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About the Research and Statistics Unit

The RSU provides research data and market intelligence to anyone with an interest in UK film and film in the UK. No part of this publication may be reproduced without the 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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Introduction

In the previous bulletin (March 2005) we reported that admissions and box office were higher in 2004 than 2003. This edition begins with a look at box office performance in the first six months of 2005 and the picture is less rosy. The disappointing performance of certain 'blockbuster' movies and a poorer than anticipated showing in the early summer season has led to a fall in admissions for the first half of 2005, down 8.4% on the same period in 2004, as reported in section 1. Box office gross revenues have fared better, but still remain 1.3% down on the first half of 2004, at £367.4 million.

That said, the slowdown in the UK theatrical market is less pronounced than in the US and other major European territories (where, for example, Germany and Italy both saw admissions fall by over 16% in the first half of the year). On a positive note, the market share of UK films released in the first half stood at 24.8%, up on the full year total for 2004 (23.4%).

And there is further reason for optimism as the year progresses. At the time of writing *Charlie and the Chocolate Factory* (a UK/USA inward investment feature) is doing brisk business at the box office, and hopes for a healthy full-year admissions total are pinned on a stronger slate in the second half of the year with a number of other big name films (e.g. *Harry Potter and the Goblet of Fire*, *King Kong*, *Chronicles of Narnia*) being released alongside home-grown hopefuls like *Wallace & Gromitt: The Curse of the Were-Rabbit*, *The Constant Gardener*, *Pride and Prejudice*, *Mrs Henderson Presents* and *Nanny McPhee*. Industry forecasts suggest the year should recover enough for admissions to equal or better 2004.

Turning attention from the general to the specific, section 2 presents a close-up look at the distribution of foreign language films, based on analysis of UK box office data between 2000 and 2004. It shows there has been an increase in the number of foreign language releases, the number of distributors releasing these films and their market share over the period. All of which suggest the market for foreign language films, while still at a stubbornly low level, has increased in size in recent years.

Continuing this theme, section 3 presents a look at the top performing specialised films on DVD (which includes foreign language films, but also non-mainstream English language features). DVD provides an increasingly important revenue stream and it can hugely expand the potential audience for specialised films given only limited theatrical releases.

This is followed in section 4 by our regular update of film on TV. The number of films shown on terrestrial TV saw a small rise in the first half of 2005 compared with the same period in 2004, although the number of UK films broadcast fell by 11%, despite a Bond season on ITV1. Only 3.8% of films broadcast on terrestrial TV were recent UK titles (i.e. made in the last eight years). Foreign language films accounted for only 2.4% of all films broadcast, lower than the full year total for 2004.

The bulletin ends with a feature on Film File Europe, a free database supported by the UK Film Council and MEDIA Plus Programme of the European Union that aims to encourage the networking of European professionals by providing a guide to what's being funded, produced and distributed in Europe, and who the key players are.

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. Theatrical market in the first half of 2005

Admissions were disappointing in the first six months of 2005, down 8.4% on the same period in 2004, to 74.7 million. A stronger February and March, buoyed by mainstream comedies (*Meet the Fockers*, *Hitch*) and family films over the lucrative Easter holiday period (*Valiant*, *Robots*) was not enough to offset the weaker performance of films in April and June. The monthly breakdown is given in [Tables 1.1](#) to [1.3](#).

Table 1.1: Monthly admissions, January – June

Month	2004 (million)	2005 (million)	% +/- on 2004
January	15.3	13.4	-12.4
February	13.3	14.8	+11.3
March	10.7	12.3	+15.0
April	14.5	10.6	-29.6
May	13.1	13.1	0.0
June	14.7	10.5	-28.6
Total	81.6	74.7	-8.4%

Source: CAA, Nielsen EDI

Table 1.2: Average weekly admissions, January - June

Month	2004 weekly average (million)	2005 weekly average (million)
January	3.5	3.0
February	3.2	3.7
March	2.4	2.8
April	3.4	2.5
May	3.0	3.0
June	3.4	2.5

Source: CAA, Nielsen EDI

Table 1.3: Monthly admissions, 2001 to 2005

Month	2001 (million)	2002 (million)	2003 (million)	2004 (million)	2005 (million)
January	11.6	15.0	16.3	15.3	13.4
February	13.8	19.0	15.0	13.3	14.8
March	10.0	14.3	10.4	10.7	12.3
April	14.0	13.2	12.4	14.5	10.6
May	11.6	14.0	13.8	13.1	13.1
June	9.4	12.2	9.4	14.7	10.5

Source: CAA, Nielsen EDI

The total box office gross in the first half of 2005 fell by a lower margin than admissions, to £367,394,263 (down 1.3% on the same period in 2004).

A look at the top titles in the first half of the year reveals a familiar picture. The list (Table 1.4) is dominated by American films; 17 of the top 20 have US involvement. There were 7 UK films, including UK/USA inward investment features, in the top 20.

Table 1.4: Box office results for the top 20 films released in the UK, January-June 2005

Rank	Title	Country of origin	Gross box office (£)	Opening cinemas	Opening weekend (£)	Distributor
1	Star Wars: Episode III	USA	39.29	490	14.36	20th Century Fox
2	Meet The Fockers	USA	28.66	456	7.92	UIP
3	Hitch	USA	17.39	1	0.05	Sony Pictures
4	Batman Begins*	UK/USA	16.10	514	4.43	Warner Bros.
5	Mr. and Mrs. Smith	USA	13.53	450	3.94	20th Century Fox
6	Ocean's Twelve	USA /Aus	12.45	450	3.39	Warner Bros.
7	Robots	USA	12.33	474	2.62	20th Century Fox
8	The Hitchhiker's Guide to the Galaxy	UK/USA	10.67	465	3.30	Buena Vista
9	Valiant	UK	8.52	403	1.10	Entertainment
10	Closer	UK/USA	8.38	275	1.57	Sony Pictures
11	Kingdom of Heaven	UK/USA/Spa	7.76	447	2.53	20th Century Fox
12	The Interpreter	USA	7.18	370	1.59	UIP
13	Sin City	USA	7.08	395	2.45	Buena Vista
14	Constantine	USA/Ger	6.66	353	2.10	Warner Bros.
15	White Noise	UK/Can	6.46	314	1.79	Entertainment
16	Monster-In-Law	USA	6.33	380	1.31	Entertainment
17	The Magic Roundabout	UK/Fra	5.87	425	1.57	Pathé
18	Racing Stripes	USA/S Africa	5.73	394	1.15	Momentum
19	Spongebob Squarepants	USA	5.59	440	1.25	UIP
20	Million Dollar Baby	USA	5.40	285	0.80	Entertainment

Source: Nielsen EDI, RSU analysis

Gross box office gross = cumulative total up to 14 August 2005

Films with an asterisk (*) were still being exhibited on 14 August 2005

The market share of all UK films released between January and June stood at 24.8%, higher than the full year total for 2004 (23.4%). [Table 1.5](#) focuses on the performance of the top 20 UK films at the box office, which collectively earned £86,801,339 by the time of writing.

Table 1.5: Top 20 UK films released in the UK, January-June 2005

Rank	Title	Country of origin	Gross box office (£)	Opening cinemas	Distributor
1	Batman Begins*	UK/USA	16.10	514	Warner Bros.
2	The Hitchhiker's Guide to the Galaxy	UK/USA	10.67	465	Buena Vista
3	Valiant	UK	8.52	403	Entertainment
4	Closer	UK/USA	8.38	275	Sony Pictures
5	Kingdom of Heaven	UK/USA/Spa/Ger	7.76	447	20th Century Fox
6	White Noise	UK/Can	6.46	314	Entertainment
7	The Magic Roundabout	UK/Fra	5.87	425	Pathé
8	Sahara	UK/Ger/Spa/USA	4.73	399	UIP
9	The Wedding Date	UK/USA	3.96	300	Entertainment
10	Alexander	UK/USA/Fra/Neth	2.72	415	Warner Bros.
11	Vera Drake	UK	2.18	65	Momentum
12	Creep	UK/Ger	1.84	194	Pathé
13	Hotel Rwanda	UK/Ita	1.60	17	Entertainment
14	Millions	UK/USA	1.46	256	Pathé
15	League of Gentlemen's Apocalypse	UK/Ire	1.37	282	UIP
16	It's All Gone Pete Tong	UK/Can	0.77	282	Redbus
17	A Good Woman	UK/Spa/Ita/USA	0.70	105	Vertigo Films
18	Vanity Fair	UK/USA	0.67	139	UIP
19	The Jacket	UK/USA/Ger	0.61	130	Warner Bros.
20	Bullet Boy	UK	0.45	75	Verve Pictures

Source: Nielsen EDI, RSU analysis

Gross box office = cumulative total up to 14 August 2005

Films with an asterisk (*) were still being exhibited on 14 August 2005

The top 20 foreign language films released between January and June earned £12,770,576, led by three films that each took more than £1 million at the box office: *Downfall*, *A Very Long Engagement* and *Kung Fu Hustle* (Table 1.6). Eight of the top 20 films are in Hindi, and they collectively earned £3.9 million.

Table 1.6: Top 20 foreign language films released in the UK, January-June 2005

Rank	Title	Country of origin	Gross box office (£)	Opening cinemas	Distributor	Language
1	Downfall*	Ger/Ita/Austria	1.85	49	Momentum	German
2	A Very Long Engagement	Fra/USA	1.46	121	Warner Bros.	French
3	Kung Fu Hustle*	China	1.30	276	Sony Pictures	Cantonese
4	The Chorus	Fra/Swit/Ger	0.95	64	Pathé	French
5	Waqt	Ind	0.89	34	Eros International	Hindi
6	Maria Full of Grace	USA/Col	0.67	24	Icon	Spanish
7	Bunty Aur Babli	Ind	0.56	30	Yash Raj Films	Hindi
8	Paheli	Ind	0.54	43	Eros International	Hindi
9	Bewaafa	Ind	0.52	25	Eros International	Hindi
10	Black	Ind	0.48	19	Yash Raj Films	Hindi
11	Laura's Star	Ger/Bul	0.48	160	Warner Bros.	German
12	Parineeta	Ind	0.44	33	UTV Communications	Hindi
13	2046	Chi/Fra/Ger	0.39	26	Tartan Films	Cantonese
14	The Consequences of Love	Ita	0.39	10	Artificial Eye	Italian
15	5x2	Fra	0.38	16	UGC Films	French
16	The Sea Inside	Spa/Fra/Ita	0.33	73	Entertainment	Spanish
17	Ong-Bak	Thai	0.32	86	Contender Films	Thai
18	Lucky	Ind	0.29	29	Eros International	Hindi
19	The Edukators	Ger/Austria	0.29	19	UGC Films	German
20	Kaal	Ind	0.24	21	Yash Raj Films	Hindi

Source: Nielsen EDI, RSU analysis

Gross box office = cumulative total up to 14 August 2005

Films with an asterisk (*) were still being exhibited on 14 August 200

2. Foreign language films at the UK box office

This section looks in detail at the market for foreign language films at the UK box office, to gauge its size and characteristics and also to consider whether it has grown between 2000 and 2004.

The number of foreign language releases has increased over the last five years. During this period, 654 foreign language films were released theatrically in the UK, accounting for 33.1% of all releases. [Table 2.1](#) reveals the pattern of increase in the number of foreign language releases, which grew by just under 60% between 2000 and 2004. There was a minor dip in the number of releases in 2001 and a drop in proportion of releases in 2003.

Table 2.1: Number of foreign language films released in the UK, 2000-2004

Year	Number of foreign language releases	% of releases	Total number of releases
2000	106	27.7	382
2001	101	28.9	350
2002	131	35.5	369
2003	147	34.7	423
2004	169	37.5	451
Total	654	33.1	1,975

Source: Nielsen EDI, RSU analysis

The market share of foreign language films has shown a less even growth pattern as it tends to be driven by the performance of a small number of high earning individual titles, like the surprise hit *The Passion of the Christ* in 2004. Nonetheless, even if *The Passion of the Christ* is excluded from the analysis, the box office gross of foreign language films in 2004 stood at £27 million, 141% higher than in 2000 (the figure for 2004 in [Table 2.2](#) includes *The Passion of the Christ*).

Table 2.2: Market share of foreign language films released in the UK, 2000-2004

Year	Box office gross of foreign language releases (£m)	% of box office
2000	11.2	1.8
2001	29.6	4.0
2002	17.1	2.2
2003	20.4	2.5
2004	38.1	4.6

Source: Nielsen EDI, RSU analysis

*Note: The rise in 2001 was largely due to the success of *Crouching Tiger, Hidden Dragon*, *Amelie* and *Kabhi Khushi Kabhie Gham*.*

Table 2.3 gives the top 20 performing foreign language titles released in the UK between 2000 and 2004.

Table 2.3: Top 20 foreign language releases in the UK, 2000-2004

Rank	Title	Country of Origin	Gross box office (£)	WRP	Distributor	Year	Language
1	The Passion of the Christ	USA	11.08	366	Icon Film	2004	Aramaic
2	Crouching Tiger, Hidden Dragon	Ch/Tai/USA	9.36	151	Columbia Tristar	2001	Mandarin
3	Amelie	Fra/Ger	5.01	115	Momentum	2001	French
4	Hero	China	3.82	258	Buena Vista	2004	Mandarin
5	House of Flying Daggers	China	3.53	217	Pathé	2004	Mandarin
6	Motorcycle Diaries	USA/Ger/UK/Arg/Chil/Peru	2.72	82	Pathé	2004	Spanish
7	Kabhi Khushi Kabhie Gham	Ind	2.50	41	Yash Raj Films	2001	Hindi
8	City of God	Bra	2.37	77	Buena Vista	2003	Portuguese
9	Veer Zaara	Ind	2.01	60	Yash Raj Films	2004	Hindi
10	Devdas	Ind	1.74	54	Eros International	2002	Hindi
11	Kal Ho Naa Ho	Ind	1.67	38	Yash Raj Films	2003	Hindi
12	Y Tu Mama Tambien	Mex	1.62	41	Icon Film	2002	Spanish
13	Talk to Her	Spa	1.41	57	Pathé	2002	Spanish
14	Bad Education	Spa	1.35	47	Pathé	2004	Spanish
15	Good Bye, Lenin!	Ger	1.15	29	UGC Films	2003	German
16	Mohabbatein	Ind	1.10	29	Yash Raj Films	2000	Hindi
17	Spirited Away	USA/Jap	0.97	51	Optimum Rel.	2003	Japanese
18	Main Hoon Na	Ind	0.96	46	Eros International	2004	Hindi
19	Mujhse Dosti Karoge	Ind	0.80	32	Yash Raj Films	2002	Hindi
20	The Little Polar Bear	Ger	0.78	235	Warner Bros.	2003	German

Source: Nielsen EDI, RSU analysis

WRP= number of cinemas at widest point of release

Chinese films, all historical martial arts epics, dominate the top of the table, claiming three of the top five places. The lower rankings consist mainly of Hindi language films (which make up seven of the top 20 films). In all, eight European language films make the top 20 (including the Brazilian feature *City of God*), with *Ameile* being the highest placed entrant.

Five of the top 20 films (*House of Flying Daggers*, *The Motorcycle Diaries*, *Bad Education*, *Good Bye, Lenin!* and *Spirited Away*) were supported by the UK Film Council P&A fund, offering support for distributors of specialised films which otherwise would have limited releases across the UK.

If we exclude *The Passion of the Christ*, arguably a special case given the nature and appeal of the religious subject matter, the top 20 films played on average at 87 cinemas at their widest point of release, compared with an average of 490 sites for the top 20 English language films released over the same period.

Table 2.4 gives a breakdown of the number of titles by widest point of release bands (*The Passion of the Christ* is once again excluded in this analysis).

It reveals that nearly two thirds of foreign language films (65%) were screened in ten or fewer cinemas at their widest point of release, with 16.7% appearing in only one cinema. The mean (arithmetic average) number of cinemas screening a foreign language film at its widest point of release was 13 (median = 7); only 15% of films screened in 21 or more cinemas at their widest point of release.

Table 2.4: Number of foreign language films by widest point of release bands

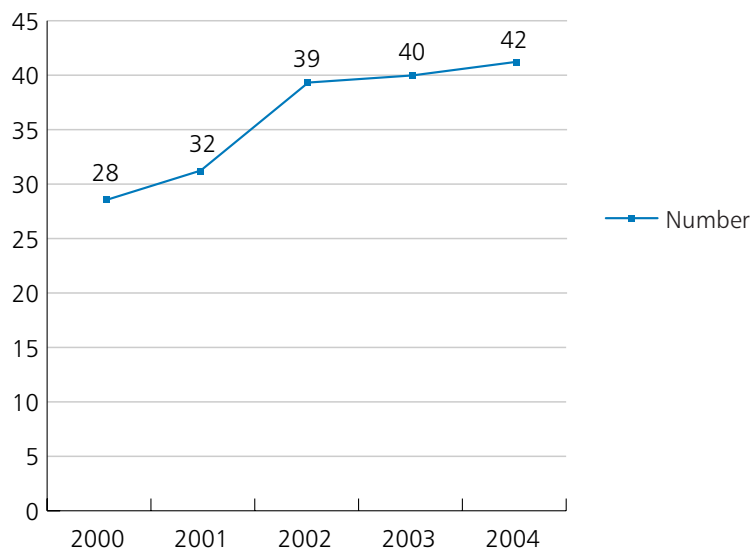
WPR band	Number	%
1 cinema	109	16.7
2 to 5 cinemas	182	27.9
6 to 10 cinemas	131	20.0
11 to 20 cinemas	134	20.5
21 to 30 cinemas	58	8.9
31 to 50 cinemas	24	3.7
51 to 100 cinemas	9	1.4
101 to 200 cinemas	3	0.5
200+ cinemas	3	0.5
Total	653	100.0

Source: Nielsen EDI, RSU analysis
WPR band= number of cinemas playing the film at its widest point of release

In all, 82 distributors released at least one foreign language film in the UK between 2000 and 2004, 63% of all active distributors in this period. 57 of these distributors released five or fewer foreign language films (32 released only one title each).

The number of distributors releasing at least one foreign language film in the UK has shown a fairly consistent rise between 2000 and 2004, as demonstrated in [Figure 2.1](#).

Figure 2.1: Number of distributors releasing at least one foreign language film, 2000-2004



Source: Nielsen EDI, RSU analysis

The 25 most active distributors of foreign language films (releasing six or more of them between 2000 and 2004) are given in [Table 2.5](#).

Table 2.5: Foreign language film distributors with the most releases, 2000-2004

Distributor	Number of releases	Box office gross (£)	Top performing title	Language
Eros International Ltd.	80	13.94	Devdas	Hindi
Artificial Eye	71	6.53	Zatoichi	Jap
Bollywood Films	36	1.79	Ek Rishtaa	Hindi
Metro Tartan	33	4.46	Belleville Rendezvous	French
Optimum Releasing	28	4.21	Spirited Away	Japanese
Spark Entertainment	28	2.24	Fiza	Hindi
Pathé Distribution Ltd.	27	13.03	House of Flying Daggers	Mandarin
Tartan Films	27	1.62	Old Boy	Korean
Venus Entertainment	23	1.52	The Hero	Hindi
BFI	22	0.99	The Leopard	Italian
Gurpreet Video Intl.	21	0.91	Aankhen	Hindi
ICA Projects	19	0.86	A Man Without a Past	Finnish
Yash Raj Films	18	12.23	Kabhi Khushi Kabhie Gham	Hindi
Metrodome Distribution	15	2.25	Together	Swedish
Columbia TriStar	14	10.39	Crouching Tiger, Hidden Dragon	Mandarin
Gala	12	0.01	East-West	French
Momentum Pictures	11	6.42	Amelie	French
Soda Pictures	11	0.19	Balzac and the Little Chinese Seamstress	French/ Mandarin
Diva Films	8	0.28	Vizontele Tuuba	Turkish
Tip Top Entertainment	7	0.94	Andaaz	Hindi
NFT	7	0.03	The Magic Gloves	Spanish
Buena Vista International	6	6.97	Hero	Mandarin
Shree Krishna Film	6	0.84	Haan Maine Bhi Pyar Kiya	Hindi
Venus Films	6	0.65	Dil Ka Rishtaa	Hindi
Millivres	6	0.01	From the Edge of the City	Greek

Source: Nielsen EDI, RSU analysis

3. Specialised films on DVD

A total of 436 features were released theatrically in 2003 and 2004 that the UK Film Council has classified as 'specialised films'.

The category has no hard and fast criteria. Broadly speaking all the qualifying films can be described as 'non-mainstream' in their intent and appeal, their production values and the way the films are marketed and released. Typically, the category includes:

- foreign language features;
- films that deal with difficult or challenging subject matter;
- features from certain genres (e.g. documentary, biopic);
- films from the archive (both old and new re-releases);
- films that present commonplace or popular themes in innovative or challenging ways.

This section examines the performance on DVD of those specialised films released theatrically in 2003 and 2004. It presents a snapshot analysis of this section of the market, shedding light on the importance of DVD as means of widening access to a broad range of film culture in the UK.

3.1 The availability of specialised film on DVD

At the time of writing, 185 of the 436 specialised films released theatrically in 2003 and 2004 had featured in the rental and retail DVD charts in the UK (42%):

- 82 of these titles were available to rent;
- 178 were available to buy;
- 7 titles were available to rent only, and 96 were only available to buy on DVD.

3.2 Specialised film to rent on DVD

Over 12.6 million DVDs of specialised films released theatrically in 2003 and 2004 have been rented to date. These same titles generated an estimated 18.8 million cinema admissions. Even if some of the titles were rented on DVD by people who had seen the film at the cinema, it is reasonable to assume that rented films tend to be watched by more than one person at a time and therefore rental DVD has the potential to greatly increase the size of these films' audiences.

Taking the average DVD rental price for 2004, £3.06 (source: BVA), the rented titles generated around £38.6 million, just under half the box office gross made by these films during their theatrical runs.

The top 20 most rented specialised films released theatrically in 2003 and 2004 are given in [Table 3.1](#). The number of rental units for each title is not given to protect the confidentiality of the data.

Table 3.1: Top 20 specialised films (released theatrically in 2003 and 2004) available to rent on DVD

Rank	Title	Country of origin	Language	Primary genre	Box office gross (£)	Theatrical release date
1	Lost In Translation	USA/Jap	English	Drama	10.06	09/01/2004
2	Eternal Sunshine of the Spotless Mind	USA	English	Romance	5.04	30/04/2004
3	About Schmidt	USA	English	Comedy	3.85	24/01/2003
4	Monster	USA/Ger	English	Biopic	2.50	02/04/2004
5	21 Grams	USA	English	Drama	2.60	05/03/2004
6	Buffalo Soldiers	UK/USA/Ger	English	Comedy	1.10	18/07/2003
7	Hero	China	Mandarin	Action	3.82	24/09/2004
8	Fahrenheit 9/11	USA	English	Documentary	6.55	09/07/2004
9	Solaris	USA	English	Sci Fi	0.95	28/02/2003
10	Animal Factory	USA	English	Drama	0.06	04/07/2003
11	House of Flying Daggers	China	Mandarin	Action	3.53	24/12/2004
12	The Good Girl	USA/Ger/Neth	English	Comedy	0.52	10/01/2003
13	Touching the Void	UK	English	Documentary	2.22	12/12/2003
14	Secretary	USA	English	Drama	1.06	16/05/2003
15	The Pianist	UK/Fra/Ger/Pol	English	Drama	2.97	24/01/2003
16	Motorcycle Diaries	USA/Ger/UK/Arg/Chil/Peru	Spanish	Biopic	2.72	27/08/2004
17	Napoleon Dynamite	USA	English	Comedy	0.56	03/12/2004
18	I Heart Huckabees	USA/Ger	English	Comedy	0.66	26/11/2004
19	Wonderland	USA/Can	English	Drama	0.26	07/05/2004
20	Dogville	UK/Den/Swe/Fra/Nor/Neth/Fin/Ger/Ita/Jap/USA	English	Drama	0.30	06/02/2004

Source: MRIB, RSU analysis

As expected, titles that performed well theatrically also appear at the top of the rental chart, although there are notable exceptions (e.g. *Animal Factory* at number 10 with a box office gross of £59,405).

Only three of the films in the top 20 are in a foreign language (*Hero*, *House of the Flying Daggers* and *Motorcycle Diaries*). It is encouraging to see two critically acclaimed documentaries, a genre currently in vogue after years in theatrical limbo, replicating their box office success on rental DVD (*Fahrenheit 9/11* and *Touching the Void*).

3.3 Specialised film to buy on DVD

Despite there being a wider selection of specialised films released theatrically in 2003 and 2004 available to buy on DVD, fewer units have been bought than rented, with 5.4 million units sold to date.

At an average retail price of £12.27 (source: BVA), the titles have generated sales to date with a value of around £66.3 million, two thirds the size of their collective gross box office (£99.6 million). Unlike the theatrical release, often on a limited number of screens for short periods, the longer term availability of DVDs in the retail catalogue should ensure continued revenue growth for the titles, with the potential to further widen the films' audiences.

The top 20 most purchased specialised films released theatrically in 2003 and 2004 are given in Table 3.2. Once again, the number of retail units for each title is not given to protect the confidentiality of the data.

Table 3.2: Top 20 specialised films (released theatrically in 2003 and 2004) available to buy on DVD

Rank	Title	Country of origin	Language	Primary genre	Box office gross (£)	Theatrical release date
1	Lost in Translation	USA/Jap	English	Drama	10.06	09/01/2004
2	City of God	Bra	Portuguese	Drama	2.37	03/01/2003
3	The Pianist	UK/Fra/Ger/Pol	English	Drama	2.97	24/01/2003
4	Eternal Sunshine of the Spotless Mind	USA	English	Romance	5.04	30/04/2004
5	About Schmidt	USA	English	Comedy	3.85	24/01/2003
6	Hero	China	Mandarin	Action	3.82	24/09/2004
7	House of Flying Daggers	China	Mandarin	Action	3.53	24/12/2004
8	Fahrenheit 9/11	USA	English	Documentary	6.55	09/07/2004
9	Secretary	USA	English	Drama	1.06	16/05/2003
10	Solaris	USA	English	Sci Fi	0.95	28/02/2003
11	Girl with a Pearl Earring	UK/Lux	English	Drama	3.84	16/01/2004
12	Touching the Void	UK	English	Documentary	2.22	12/12/2003
13	Spirited Away	USA/Jap	Japanese	Animation	0.97	12/09/2003
14	21 Grams	USA	English	Drama	2.58	05/03/2004
15	Buffalo Soldiers	UK/USA/Ger	English	Comedy	1.10	18/07/2003
16	The Good Girl	USA/Ger/Neth	English	Comedy	0.52	10/01/2003
17	Whale Rider	NZ/Ger	English	Drama	1.52	11/07/2003
18	All Quiet on the Western Front	USA	English	War	0.02	07/11/2003
19	Monster	USA/Ger/Neth	English	Biopic	2.53	02/04/2004
20	Napoleon Dynamite	USA	English	Comedy	0.56	03/12/2004

Source: The Official UK Charts Company; RSU analysis

Thirteen of the top 20 titles have US involvement, and four are UK productions. The top 20 films collectively took £56 million at the UK box office and sold 3.8 million units on DVD.

3.4 Comparison of theatrical and DVD revenues

The 185 specialised films released theatrically in 2003 and 2004 that featured in rental and retail DVD charts at the time of writing generated £102.6 million in gross box office revenues. This compares with £104.9 million estimated to have been generated in DVD rentals and sales of the same titles, demonstrating the significance of this increasingly lucrative link in the value chain.

4. Film on UK television in the first half of 2005

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.

4.1 Introduction

This section examines the number of films broadcast on UK television in the first half of 2005, with a particular focus on the number of UK films and foreign language films shown on television, including a separate assessment of recent UK films made in the last 8 years.

As [Table 4.1](#) shows, there were 1.7 billion viewing instances of films on terrestrial and multi-channel TV in the first half of 2005, compared with 74.7 million cinema admissions in the same period: more films are watched by more people on television than at the cinema.

Table 4.1: Number of viewing instances of films on terrestrial and multi-channel television, first half of 2005

Channel	Viewing instances
BBC1	266,748,500
BBC2	111,103,700
ITV1	271,292,400
Channel 4	223,956,300
Five	325,674,700
Terrestrial total	1,198,775,600
Multichannel	491,988,000
Total	1,690,763,600

Source: BARB, DGA Metrics

Note: 'Viewing instances' are the number of viewers for each film broadcast, summed for each channel.

4.2 Total number of films on terrestrial TV

The total number of films broadcast on terrestrial TV in the first half of this year showed a slight increase on the equivalent period in 2004, as shown in [Table 4.2](#). This was due mainly to an 80% increase in the number of films shown on ITV1 in that time. The number of films shown on BBC1 fell by a fifth, and the numbers for BBC2 and Channel 4 decreased slightly.

Table 4.2: Total number of films broadcast in first half of year on terrestrial TV

Channel	2003	2004	2005	% change 2004/5
BBC1	188	218	171	-21.6
BBC2	187	202	185	-8.4
ITV1	150	109	196	+79.8
Channel 4	289	286	280	-2.1
Five	311	298	307	+3.0
Total	1125	1113	1139	+2.3

Source: BARB, DGA Metrics

4.3 Total number of UK films on terrestrial TV

The total number of UK films broadcast by the five terrestrial channels fell by 11% on the first six months of 2004 (Table 4.3); a similar decline was recorded from 2003-4. Again, ITV1 showed gains in this area, although from a very low base. The number of UK films on BBC1 halved, and fell by a third on BBC2.

Table 4.3: Number of UK films broadcast in first half of year on terrestrial TV

Channel	2003	2004	2005	% change 2004/5
BBC1	32	48	23	-52.1
BBC2	32	57	38	-33.3
ITV1	23	21	41	+95.2
Channel 4	123	117	116	-0.9
Five	35	30	24	-20.0
Total	245	273	242	-11.4

Source: BARB, DGA Metrics

As with the general picture for all UK films, the number of recent UK films shown on terrestrial television fell by 14% in the first six months of 2005 compared with the equivalent time in 2004 (Table 4.4).

Recent British films shown on ITV1 included *Die Another Day*, *The World Is Not Enough*, *About a Boy*, *Ali G Indahouse* and *Grey Owl*. There was also a large increase on Five, again from a very low base, where the recent UK films included *Snatch*, *Dog Soldiers* and *There's Only One Jimmy Grimble*. On Channel 4, recent UK films included *Gosford Park*, *Resident Evil*, *Mean Machine* and *Mike Bassett: England Manager*. In total, only 3.8% of all films broadcast were of recent UK origin (i.e. made in the last eight years).

Table 4.4: Number of recent (made within the last 8 years) UK films broadcast in the first six months of the year 2003-2005

Channel	2003	2004	2005	% change 2004/5
BBC1	10	11	9	-18.2
BBC2	8	20	7	-65.0
ITV1	6	1	8	+700.0
Channel 4	8	17	13	-23.5
Five	1	1	6	+500.0
Total	33	50	43	-14.0

Source: BARB, DGA Metrics

4.4 Total number of foreign language films on terrestrial TV

There were 27 foreign language films broadcast on terrestrial TV in the first half of 2005, 2.4% of the total. We do not have figures for the first half of 2004, but this level is slightly lower than the proportion for the full year 2004 (2.7%).

Table 4.5 shows the majority were subtitled, with only three dubbed films broadcast in the period.

Table 4.5: Number of foreign language films on terrestrial TV, first half 2005

Channel	Dubbed	Subtitled	Total foreign language	% all films
BBC1	0	0	0	0
BBC2	2	8	10	5.4
ITV1	0	0	0	0
Channel 4	0	16	16	5.7
Five	1	0	1	0.3
Total	3	24	27	2.4

Source: BARB, DGA Metrics

4.5 Peak time films

A total of 508 hours of film was shown in peak time across the five terrestrial channels during the first half of 2005 (Table 4.6). Five broadcast almost 50% of these hours.

Table 4.6: Total number of broadcast hours for film per channel in peak time, first half 2005

Channel	2004 Hours	2005 Hours
BBC1	87	70
BBC2	58	28
ITV1	39	71
Channel 4	114	97
Five	295	242
Total	593	508

Source: BARB, DGA Metrics

Note: Peak time runs from 18:00 to 23:59 hours

Table 4.7 shows that the largest average peak time audience for film was on BBC1, with just under 3.2 million viewers on average.

Table 4.7: Average audience for a peak time film, first half 2005

Channel	Average audience 2004	Average audience 2005
BBC1	3,071,000	3,173,000
BBC2	1,500,000	1,114,000
ITV1	4,228,000	3,102,000
Channel 4	1,785,000	2,071,000
Five	1,610,000	1,581,000

Source: BARB, DGA Metrics

4.6 Top films on terrestrial TV

Looking at the top 10 performing films on terrestrial TV in the first half of 2005, the top film, Bend It Like Beckham on BBC1, attracted 7.3 million viewers. Seven of the films were shown on BBC (Table 4.8).

Table 4.8: Top 10 films on terrestrial television, first half 2005

Rank	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Bend It Like Beckham	BBC1	UK/Ger	2002	7.3
2	Ocean's Eleven	ITV1	USA	2001	7.1
3	Indiana Jones and the Last Crusade	BBC1	USA	1989	6.6
4	Die Another Day	ITV1	UK/USA	2002	6.2
5	The World is Not Enough	ITV1	UK/USA	1999	5.6
6	Billy Elliot	BBC1	UK/Fra	2000	5.6
7	The Rock	BBC1	USA	1996	5.6
8	What Women Want	BBC1	USA	2000	5.6
9	Meet the Parents	BBC1	USA	2000	5.5
10	Raiders of the Lost Ark	BBC1	USA	1981	5.3

Source: BARB, DGA Metrics

4.7 Top UK films on terrestrial TV

Once again, as shown in Table 4.8, James Bond films featured strongly in the list of top British performers on terrestrial TV, with 7 titles that formed part of a Bond season on ITV1. Three of the top titles were made before the 1990s.

Table 4.9: Top 10 UK-originated films on terrestrial television, first half 2005

Rank	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Bend It Like Beckham	BBC1	UK/Ger	2002	7.3
2	Die Another Day	ITV1	UK/USA	2002	6.2
3	The World is Not Enough	ITV1	UK/USA	1999	5.6
4	Billy Elliot	BBC1	UK/Fra	2000	5.6
5	About a Boy	ITV1	UK/USA	2002	4.6
6	Goldeneye	ITV1	UK/USA	1995	4.6
7	Tomorrow Never Dies	ITV1	UK/USA	1997	4.2
8	Licence to Kill	ITV1	UK/USA	1989	4.1
9	The Living Daylights	ITV1	UK/USA	1987	4.1
10	For Your Eyes Only	ITV1	UK/USA	1981	4.0

Source: BARB, DGA Metrics

Because of the success of the ITV1 James Bond season, the overall top 10 for UK originated films was skewed towards these perennial favourites. Table 4.10 shows the top 10 UK films without the Bond films, giving a more representative picture of the different types of UK films that attract sizeable TV audiences.

Table 4.10: Top 10 UK-originated films (excluding Bond films) on terrestrial television, first half 2005

Rank	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Bend It Like Beckham	BBC1	UK/Ger	2002	7.3
2	Billy Elliot	BBC1	UK/Fra	2000	5.6
3	About a Boy	ITV1	UK/USA	2002	4.6
4	Enigma	BBC1	UK/USA/Ger/Neth	2001	3.4
5	The Full Monty	Channel 4	UK/USA	1997	3.2
6	Gosford Park	Channel 4	UK/USA/Ger/Ita	2001	3.2
7	Ali G Indahouse	ITV1	UK	2002	3.0
8	Resident Evil	Channel 4	UK/Ger/Fra	2002	2.8
9	The Heroes of Telemark	BBC2	UK	1965	2.5
10	The Dam Busters	Channel 4	UK	1954	2.4

Source: BARB, DGA Metrics

4.8 Top foreign language films on terrestrial TV

The top foreign language film on terrestrial TV was *Asterix and Obelix: Mission Cleopatra* (Table 4.11). French was the dominant language of the top 10, with only two “rest of the world” titles appearing– the original Japanese versions of the *Ring* and *Ring 2*.

Table 4.11: Top 10 foreign language films on terrestrial television, first half 2005

Rank	Title	Channel	Country of origin	Main language	Audience (million)
1	Asterix and Obelix: Mission Cleopatra	Five	Fra/Ger	French	0.57
2	Être et avoir	BBC2	Fra	French	0.56
3	The Idiots	Channel 4	Den/Swe/Fra/Ita	Danish	0.42
4	My Mother’s Courage	BBC2	Ger	German	0.41
5	The Twelve Tasks of Asterix	BBC2	Fra	French	0.40
6	Ring	Channel 4	Jap	Japanese	0.39
7	Ring 2	Channel 4	Jap	Japanese	0.36
8	Artemisia	BBC2	Fra/Ger/Ita	French	0.32
9	Asterix Versus Caesar	BBC2	Fra	French	0.32
10	Nationale 7	BBC2	Fra	French	0.22

Source: BARB, DGA Metrics

4.9 Top films on terrestrial TV by channel

Tables 4.12 to 4.16 list the top 10 films appearing on each of the five terrestrial channels in the first half of 2005. US films dominated the BBC1 top ten, with all three Raiders of the Lost Ark films featuring, as in several previous years.

Table 4.12: Top 10 films on BBC1, first half 2005

Rank	Title	Country of origin	Year of theatrical release	Audience (million)
1	Bend It Like Beckham	UK/Ger	2002	7.3
2	Indiana Jones and the Last Crusade	USA	1989	6.6
3	Billy Elliot	UK/Fra	2000	5.6
4	The Rock	USA	1996	5.6
5	What Women Want	USA	2000	5.6
6	Meet the Parents	USA	2000	5.5
7	Raiders of the Lost Ark	USA	1981	5.3
8	The Others	USA/Spa	2001	5.3
9	Indiana Jones and the Temple of Doom	USA	1984	5.0
10	E.T. the Extra-Terrestrial	USA	1982	4.4

Source: BARB, DGA Metrics

The BBC2 chart features seven films made before the 1990s, as well as three more recent UK originated films.

Table 4.13: Top 10 films on BBC2, first half 2005

Rank	Title	Country of origin	Year of theatrical release	Audience (million)
1	The Heroes of Telemark	UK	1965	2.5
2	Flight of the Phoenix	USA	1966	2.1
3	A Bridge Too Far	UK/USA	1977	2.0
4	Top Gun	USA	1986	1.8
5	Sweet Sixteen	UK/Ger/Spa	2002	1.6
6	Heaven Knows, Mr Allison	USA	1957	1.6
7	Joan of Arc	USA	1948	1.5
8	King of Kings	USA	1961	1.5
9	The Island on Bird Street	UK/Den/Ger	1997	1.5
10	The Heart of Me	UK/Ger	2002	1.4

Source: BARB, DGA Metrics

The ITV1 chart is a familiar one, featuring many library titles such as the Bond films and more recent Hollywood mainstream films.

Table 4.14: Films on ITV1, first half 2005

Rank	Title	Country of origin	Year of theatrical release	Audience (million)
1	Ocean's Eleven	USA	2001	7.1
2	Die Another Day	UK/USA	2002	6.2
3	The World is Not Enough	UK/USA	1999	5.6
4	Dr Dolittle	USA	1998	5.0
5	Jurassic Park III	USA	2001	4.7
6	About a Boy	UK/USA	2002	4.6
7	Goldeneye	UK/USA	1995	4.6
8	Tomorrow Never Dies	UK/USA	1997	4.2
9	Licence to Kill	UK/USA	1989	4.1
10	Star Wars Episode I: The Phantom Menace	USA	1999	4.1

Source: BARB, DGA Metrics

The documentaries *Super Size Me* and *Fahrenheit 9/11* were broadcast on Channel 4 within a few months of their initial theatrical release, and had a strong impact on the ratings (Table 4.15). The relatively disappointing performance of *Lord of the Rings: The Fellowship of the Ring*, the third largest film at the worldwide box office over the last ten years, can be attributed to the success of the film in the preceding release platforms. Most people who might wish to see the film will probably have done so at the cinema, on rental and retail DVD and/or on pay-per-view and subscription movie channels.

Table 4.15: Films on Channel 4, first half 2005

Rank	Title	Country of origin	Year of theatrical release	Audience (million)
1	Shallow Hal	USA	2001	4.7
2	Super Size Me	USA	2004	4.5
3	The Lord of the Rings: The Fellowship of the Ring	USA/NZ	2001	4.0
4	Fahrenheit 9/11	USA	2004	3.7
5	Rush Hour 2	USA	2001	3.4
6	The Full Monty	UK/USA	1997	3.2
7	Gosford Park	UK/USA/Ger/Ita	2001	3.2
8	From Hell	USA/Czech Rep	2001	3.0
9	Resident Evil	UK/Ger/Fra	2002	2.8
10	Spy Game	USA	2001	2.6

Source: BARB, DGA Metrics

All the top 10 films on Five are US originated and almost all are in the Action/Adventure genre (Table 4.16).

Table 4.16: Top 10 films on Five, first half 2005

Rank	Title	Country of origin	Year of theatrical release	Audience (million)
1	Air Force One	USA	1997	3.1
2	Panic Room	USA	2002	3.0
3	Con Air	USA	1997	2.8
4	Tears of the Sun	USA	2003	2.7
5	The Bone Collector	USA	2000	2.6
6	Enemy of the State	USA	1998	2.5
7	The Enforcer	USA	1976	2.5
8	The Goonies	USA	1985	2.5
9	The Fugitive	USA	1993	2.5
10	Lethal Weapon 3	USA	1992	2.4

Source: BARB, DGA Metrics

4.10 Films on multi-channel TV

In the first half of 2005 there were 29,938 film broadcasts on multi-channel in first half of 2005, comprising 3,077 individual film titles (the remainder were repeat broadcasts).

Looking at the top performing titles on multi-channel TV, half of the films listed were shown on the non-subscriber ITV2 channel and all were US in origin (Table 4.17). Audiences were comparatively low – ranging from 670,000 to 800,000. *Grease* was the top film for the second half-year running.

Table 4.17: Top 10 feature films on multi-channel television, first half 2005

Rank	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Grease	ITV2	USA	1978	0.80
2	American Pie 2	ITV2	USA	2001	0.77
3	Crocodile Dundee II	ITV2	USA	1988	0.75
4	Bruce Almighty	Sky Movies 1	USA	2003	0.75
5	Pretty Woman	ITV2	USA	1990	0.72
6	Mission: Impossible	ITV2	USA	1996	0.71
7	Mission: Impossible II	ITV2	USA	2000	0.70
8	Mission: Impossible II	ITV2	USA	2000	0.70
9	The Siege	ITV2	USA	1998	0.68
10	What Women Want	BBC3	USA	2000	0.67

Source: BARB, DGA Metrics

Note: *Mission: Impossible II* was screened on 1 March and 12 June 2005

Finally, across the subscription movie channels the top 10 audiences ranged from 430,000 to 750,000 (Table 4.18). All were of US origin apart from *Shaun of the Dead* and *Lara Croft Tomb Raider 2 – the Cradle of Life*.

Table 4.18: Top 10 features films on subscription movie channels, first half 2005

Rank	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Bruce Almighty	Sky Movies 1	USA	2003	0.75
2	The League of Extraordinary Gentlemen	Sky Movies 1	USA/Ger/Czech	2003	0.57
3	Bad Boys II	Sky Movies 1	USA	2003	0.57
4	Shaun of the Dead	Sky Movies 1	UK	2004	0.51
5	Kill Bill: Vol 1	Sky Movies 1	USA	2003	0.49
6	SWAT	Sky Movies 2	USA	2003	0.49
7	Legally Blonde 2: Red, White and Blonde	Sky Movies 2	USA	2003	0.48
8	Lara Croft Tomb Raider 2: The Cradle of Life	Sky Movies 2	UK/USA/Jap/Ger	2003	0.47
9	Anger Management	Sky Movies 2	USA	2000	0.67
10	Gothika	Sky Movies 2	USA	2003	0.43

Source: BARB, DGA Metrics

5. Film File Europe – information on the European film business

In the film industries of 21st-century Europe, co-production – once something of an adventure for anyone other than the French or the Italians – has become the norm. But films from one country seem as reluctant to cross the border into the next as they were when those borders still had guards. Do we know as much as we should do about the countries we do business with – about which companies prosper, which have closed down and who does business with whom?

www.FilmFileEurope.com is an ambitious – not to say utopian – attempt to 'map' Europe for producers seeking production partners, financiers wanting to know how the funding system works in this or that region, or anyone interested in seeing what films this or that distributor has handled and how they have got on with them.

It is a free online business-to-business tool that seeks, in the best tradition of the European Union, to bring information across borders using the one medium that is truly without frontiers: the worldwide web.

Film File Europe's key objective is to establish a bank of knowledge that will stimulate cross-border film funding and production activity and the distribution of non-national films within the EU by providing authoritative and up to date information about the European film business.

Film File Europe aims to achieve its key objective by:

- Providing country-by-country production and distribution profiles to help improve practitioners' understanding of EU markets;
- Offering production and distribution company contact details to enable networking by industry professionals;
- Supplying informed commentary on and analysis of companies' recent history and track record;
- Giving details of public funding opportunities.

The database currently houses data on eleven EU countries, including all five of the biggest European film markets (UK, France, Germany, Spain and Italy). The Republic of Ireland will be added by the end of 2005 and Scandinavian countries are planned to follow in early 2006.

The database contains over 7,300 film records, over 2,300 production company profiles, details of over 500 distributors and over 100 public funders. The site is being added to on a daily basis, and once complete it will house information on the industries in all 25 EU countries.

Film File Europe is supported by the UK Film Council and the MEDIA Plus Programme of the European Union.

Visit the site at www.filmfileeurope.com