



Royal Holloway, University of London
The Department of Media Arts

**The UK low-budget film sector
during the ‘digital revolution’ between 2000 and 2012:
a quantitative assessment of its technological,
economic and cultural characteristics**

A research thesis submitted to Royal Holloway, University of London
in fulfilment of the requirements for the degree of
Doctor of Philosophy

by

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A handwritten signature in blue ink, appearing to read 'John Chappell Crissey III', with a stylized flourish at the end.

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ABSTRACT

Despite a large amount of research on the British movie industry, the ‘UK low-budget film sector’ remains under-researched. This doctoral thesis redresses this deficiency by providing a quantitative analysis of the sector from 2000 to 2012, a period that is described as involving a ‘digital revolution’ due to an unprecedented amount of technological innovation. The main questions addressed are: ‘What was the sector’s size?’; ‘What were the sector’s main traits?’; and ‘How was the sector affected by digital technology?’. In response to these questions, the thesis reconsiders: the definition of a low-budget movie, the ‘industry peculiarities’ within which producers operated, the characteristics of the sector, the technological developments at the time and how they shaped the sector. The study then makes use of supply chain theory to identify and measure the impact of technological innovation on the economic and cultural contributions made by the sector. The findings of the thesis show a higher level of production than has been reported in official estimates; the probable reasons for growth; the continuance of a high amount of risk in the supply chain process; a rapid transition to digital technology-based tools; a marked decrease in the price-quality ratio of tools; a rise in the regionalisation of locations, skills and narratives; a decrease in the cost and time of the filmmaking process; a marked rise in the percentage of movies exhibited online; and a growth in audience levels. The study also found a new relevance for ‘budget realignment theories’ published in the 1990s and offers new quantitative evidence of how the sector makes a substantial economic and cultural contribution to the domestic industry. In doing so, this PhD thesis adds to earlier studies of the British movie industry by shedding new insight on an often-neglected sector.

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LIST OF ABBREVIATIONS

The following abbreviations are adopted throughout this thesis:

A2D2A	Analogue-to-Digital-to-Analogue process
AMPAS	Academy of Motion Picture Arts and Sciences
APC	Average Production Cost
BAME	Black, Asian, and Minority Ethnic
BAFTA	British Academy of Film and Television Arts
BBFC	British Board of Film Classification
BECTU	Broadcasting, Entertainment, Cinematograph and Theatre Union (UK)
BFI	British Film Institute
BFIRSU	UKFC/BFI Research and Statistics Unit
DCMS	British Government Department for Culture, Media and Sport (UK)
EAO	European Audiovisual Observatory
EIFF	Edinburgh International Film Festival
EIS	Enterprise Investment Scheme
FDA	Film Distributors' Association (UK)
FFE	Film File Europe
FTR	Film Tax Relief
GLA	Greater London Area
ICO	Independent Cinema Office (UK)
HD or HDV	High-definition video
HMRC	Her Majesty's Revenue and Customs (UK)
IFFR	International Film Festival Rotterdam
IMDb	Internet Movie Database website
IPRs	Intellectual Property Rights
LGBT	Lesbian, Gay, Bisexual and Transgender / Transsexual
MPAA	Motion Picture Association of America (US)
MPC	Minimum Production Cost
N/RSAs	National and Regions Screen Agencies (UK)
NA	Northern Alliance (UK)
NFTS	National Film and Television School (UK)
NPA	New Producers Alliance (UK)
PACT	Producers Alliance for Cinema and Television (UK)
PESTEL	Political, Economic, Social, Technological, Environmental and Legal
PIBHC	Personal Income Before Housing Cost
PSBs	Public Service Broadcasters (UK)
SAG	Screen Actors Guild (US)
SEIS	Seed Enterprise Investment Scheme
SWOT	Strengths, Weaknesses, Opportunities and Threats
TIFF	Toronto International Film Festival
UKFC/BFI	UK Film Council / British Film Institute (UK)
VAT	Value-added tax
VIFF	Venice International Film Festival
VOD	Video on Demand
WGA	Writers Guild of America (US)

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LIST OF SYMBOLS

The following symbols are adopted throughout this thesis:

\sim	Approximately, or roughly similar to, or general size
$>$	Greater than
\geq	Greater than or equal to
$<$	Less than
\leq	Less than or equal to
σ	Standard deviation



1. INTRODUCTION

In the academic realms occupied by British media economics and arts research, the ‘UK low-budget film’ has been frequently neglected by researchers.¹ Since the start of this century, films of this type have won prestigious awards, gained devoted ‘cult followings’, received public-sector investment despite strict austerity measures, and launched the careers of now-celebrated professionals. Yet, in spite of such benefits to British cinema, the 21st century contribution of such films has seldom been the subject of academic study. One explanation for this paradox is that only a small number of these films have been theatrically released and, of those, only a fraction were marketed; as a result, these movies have often failed to gain an audience and the attention of academics. In addition, the lack of scholarly interest has likely been due to the fact that these productions have only gained a modicum of critical acclaim.² What reputation these quintessentially British films do have, therefore, has long been tainted by poor storytelling to the extent that this is likely the reason why the ‘low-budget sector’ has seldom been studied.³

Despite this situation, a relatively modest amount of research on low-budget movies has been published; however, much of this work has not been very systematic, rigorous or focused on the sector. Most of this research has considered the sector within the broader context of the history of the British film industry and its attempts to counter Hollywood domination in the twentieth century. These studies often portray heightened periods of low-budget production as a negative consequence of those attempts. However, in the 1990s, studies by Steve McIntyre and Terry Ilott argued that low-budget films might play a more substantial role in the economic

¹ The ‘low-budget film’ is defined in this thesis as any British feature-length narrative live-action movie made for ≤£2.5m.

² The press reviews for *Got to Run* (2011) and *Offending Angels* (2000) typify the egregious reviews received by most released low-budget movies. In particular, the BBC critic Jamie Russell described *Offending Angels* as a ‘truly awful pile of garbage’ and asks how it ‘ever got funding’ (2002) and film critic Peter Bradshaw called *Got to Run* so ‘awe-inspiringly bad’ that it is ‘simply un-releasable’ (Guardian 2011).

³ The ‘low-budget sector’, which is often referred to simply as the ‘sector’, is defined in this thesis as the part of the British film industry that manufactures feature-length narrative live-action movies made for ≤£2.5m.

and cultural sustainability of the film industry than had earlier been considered. These studies comprised an evidence-based advocacy for an industry-wide realignment towards the making of market-orientated productions with lower budgets. This advocacy, however, occurred when filmmaking was still based on analogue technologies that posed high barriers to new entrants and, for this reason, was largely unheeded by both practitioners and academic researchers.⁴

Over the last two decades, however, the evidential justification for conducting an investigation into the low-budget film has become more compelling than its limited scholarly interest might otherwise suggest. This rationale continues to evolve and needs to be prefaced with a reference to digital technologies, which became ubiquitous early in this century. These innovations and their wide-ranging effect on the global film industry are together termed the ‘digital revolution’ in this study, and the arrival of this event should be viewed as one of the most significant events in the history of the motion-picture industry.⁵ Characterised by an unprecedented rise in total U.S. patent applications that resulted in more new technologies being made available and a dramatic shift in the world’s capacity to store digital data,⁶ what also distinguishes the period between 2000 and 2012 from earlier periods of advancement is that it fundamentally altered every aspect of the low-budget script-to-screen process to the point that all-digital workflows became the norm (Chapter Four). Consequently, producers with modest resources gained new capabilities, suggesting an altogether new relevancy for the budget realignment proposals made

⁴ Further notable exceptions to this assertion will be presented later in this chapter.

⁵ The ‘digital revolution’ is defined in this thesis as the sector’s rapid transition from analogue technology-based tools and processes to ones based on digital technology during the first twelve years of this century (Chapter Four). However, in defining the term in this manner, it is also recognised that the use of the word ‘revolution’ and the timing defined in this study is different from how the term has been used by other media commentators. For instance, Paul Ceruzzi suggests the origins of digital technology can be traced back to the 1940s (2003: 13), Harry Mathias argues the first digital camera to enter the market in the 1980s marks the start of the ‘digital age’ (2015: 37) and Brian Vastag concludes the ‘digital age’ started in 2002 when the world began storing more data on digital formats than on analogue formats (2011). This thesis adopts Duncan Petrie’s first use of the term ‘digital revolution’ (2002: 66) by customising it based on Hilbert and López’s findings that the global transformation in data storage rose to exponential levels after 2000 and was largely completed by 2012 (2011: 60–65).

⁶ Patent applications rose by 261,748 (83%), a number higher than any previous twelve-year period (USPTO 2015) and the world’s capacity to store data in compressed megabytes rose from 25% in 2000 to 100% in 2012 (Hilbert and López 2011: 65).

by McIntyre and Ilott in the 1990s and, as a consequence, offer a new reason to reconsider how the sector might play a more substantial role in the future of British cinema.⁷

1.1 Overview

This thesis is a quantitative assessment of the low-budget sector from 2000 to 2012 and is based on the premise that the subject is largely unresearched from a sector-level perspective and what has been published is not particularly rigorous or systematic. This situation is problematic for two reasons. First, it suggests that existing research is not portraying an accurate aggregate of the sector's contributions to the British film industry. Second, this gap in the literature remains problematic with respect to the continuing discourse about strategies to create a sustainable domestic film industry, and with respect to empirical data suggesting that an all-digital 'supply chain' resulted in the sector gaining the capability to play a more crucial role in such a strategy.⁸

This situation provides the academic justification to ask, 'What was the state of the low-budget sector during the digital revolution, and how did digital technology affect its operations and its contribution to the British film industry?'⁹ This is the main research question addressed in this study, but any comprehensive attempt to answer it requires a more detailed set of questions to be considered. For this reason, attempts to answer certain subsidiary questions are also made: in particular, 'What changes occurred in the size of the sector?'; 'How did digital technology affect the low-budget filmmaking process?'; 'What were the sector's economic and cultural contributions to the domestic movie industry?'; and 'What are the main research findings, and

⁷ The 'producer' is defined in this thesis as the person(s) responsible for every aspect of the script-to-screen process, including the planning, sourcing, financing, manufacturing and delivering of a low-budget feature-length movie.

⁸ The 'supply chain' or 'script-to-screen' process is defined herein as all the tasks required to conceive, produce, distribute and exhibit a film.

⁹ The term 'total contribution' is defined in this thesis as the total economic and cultural value of a movie or group of movies.

what do they suggest should be considered in public sector policies intended to establish a more sustainable and culturally representative British motion-picture industry?’.

The aim of this thesis is to make a significant contribution to British media arts, economics and ‘film-management’ practice by means of answering these subsidiary questions and presenting an economic and cultural assessment of the low-budget sector during the digital revolution.¹⁰ In effect, the aim is to mitigate the current imbalance in academic film research by measuring how digital technology revolutionised the sector and investigate the broader implications of this change for the domestic industry. This aim is therefore different to the aims typically found in media arts research that focus on only cultural or economic characteristics since it entails a new interpretation of contribution that includes both of these views (Chapter Two).

To achieve this aim, this thesis uses a methodology based on a quantitative data perspective, a positivist epistemology and a research structure based on an interpretation of the filmmaking process. The details of this methodology will be explained in Chapter Two, but it is helpful to note here that this study differs from most media arts academic research. While it does contain some qualitative analysis, it provides mostly quantitative responses to the questions, including:

- a review of the existing research in popular and academic discourses,
- a survey of the ways low-budget films have been defined,
- a consideration of the relevant industry peculiarities that directly influence the sector,
- a description of the customised methodology used herein and how it was conceptualised,
- a census listing of all the UK low-budget feature-length movies made from 2000 to 2012,
- an entirely new set of production estimates for the sector and the wider domestic industry,
- a set of time series studies on the image-capture technology used by the sector,
- an assessment of other technological advancements that occurred during the period,
- a brief review of the relative stability of non-technological environmental economic factors,
- a set of time series studies that illustrate a transformation in the basic filmmaking process,
- a quantitative measurement of the economic contributions of the sector,

¹⁰ The term ‘film-management’ is defined herein as the study of the economic decisions that motion-picture producers make when designing, creating and delivering a feature-film to a paying audience. This process incorporates all the executive management decisions related to the planning, organisation, implementation and controlling needed to take a product through the low-budget film supply chain.

- a quantitative set of assessments of the cultural contributions of the sector,
- an evaluation of the sector's strengths, weaknesses, opportunities and threats,
- a review of the relevant findings and proposals to low-budget film-management practice,
- a review of the relevant findings and proposals for public and private sector stakeholders,
- an overall review of how the research aim was achieved and proposals for further research.

The main findings derived from these assessments indicated that from 2000 to 2012 the sector experienced an unprecedented transformation of its supply chain process. This transformation was evident in ten major observations: (1) a much higher actual level of movie production than was previously reported in official estimates; (2) a consistently high level of project complexity and risk; (3) a rapid move from analogue to digital technology, coinciding with the advent of an all-digital file-based supply chain; (4) a rapid fall in the price of image and sound-processing tools and a marked rise in tool performance; (5) a rise in regionalisation for locations, skills and narratives after the introduction of certain tool advancements; (6) a decrease in the average cost and duration of the supply chain; (7) the number of films that gained a theatrical release remained relatively small, with a marked rise in the percentage of films using online exhibition; (8) a rise in audience levels; (9) new relevance for 'budget realignment theories' published in the 1990s; and (10) the sector made a considerable economic and cultural contribution to the domestic film industry, without a rise in direct investment from public-sector agencies.

These findings and the estimates they are based on provide compelling correlational evidence that the filmmaking process became far more accessible to new producers and that the most plausible explanation for this transformation is a growth-from-innovation hypothesis (Chapter Two). This study therefore concludes that advancement in technology, not direct government intervention or public-sector programmes, was most likely the main determinant for the behaviour of low-budget producers during the period. Furthermore, evidence is presented that indicates the sector did gain a greater capability to help foster a more sustainable domestic

industry, and that certain improvements could be made in film-management practice and in the effectiveness of public-sector programmes without increasing then-current funding levels.

This thesis achieves its main aim by providing: new correlational evidence which media arts and economics researchers can use to reappraise the findings of earlier investigations; a new evidence-based view on how technological factors impact an unstudied sector of the movie industry; an additional evolutionary dimension which film historians can use to develop a more representative history of the UK industry; and an evidence-based reference work which public-sector policymakers can use to re-evaluate existing investment programmes and to develop more sustainable strategies based on a more effective use of all the sectors in the industry.

1.2 Background and existing literature

To obtain a more comprehensive understanding of the research problem addressed in this thesis it is necessary to consider the relevant background details and the research that has previously assessed low-budget films. This eclectic group of publications can be categorised as contextual research that respectively explored: historical perspectives related to Hollywood's dominant position within the British movie industry during the twentieth century, and attempts to respond to this issue that affected the low-budget sector; market-based responses to this issue based on low-budget strategies; macroeconomic views that reference low-budget movies; practitioner-author descriptions of low-budget moviemaking in the early 2000s; and specific assessments of the low-budget film sector. Despite their various specialisations, however, when the relevant details of these studies are considered together, they provide an evidence-based narrative that not only explains the factors that have influenced the sector's output and the origin of its poor reputation, but also offers the background for why further academic research can be justified.

The background of the low-budget sector is obviously rooted in the history of the British movie industry and there is a large amount of literature that explores this history. The texts that help comprise this work include: histories like David Puttnam's *The Undeclared War: Struggle for Control of the World's Film Industry* (1997); UK-specific histories such as Alexander Walker's *Icons in the Fire: The Rise and Fall of Practically Everyone in the British Film Industry* (2004), *Hollywood England* (2005) and *National Heroes: British Cinema in the Seventies and Eighties* (2005); national statistical reports such as Sean Perkins' 'Film in the UK, 2001-10: A Statistical Overview' (2012); studies that assess the public-sector's role such as Andrew Higson's view of 'Englishness' in *Film England* (2011), Gillian Doyle et al.'s *The Rise and Fall of the UK Film Council* (2015) and Geoffrey Macnab's *Stairways to Heaven: Rebuilding the British Film Industry* (2018); and works that study the cultural and institutional history of low-budget films as part of a larger project, such as John Hill's *British Cinema in the 1980s* (1999), Margaret Dickinson's *Rogue Reels: Oppositional Film in Britain 1949-90* (1999) and Richard Farmer et al.'s *Transformation and Tradition in 1960s British Cinema* (2019). These investigations either chronicle how the UK film industry responded to certain challenges during its existence or how certain films might have made a contribution to British cinema, but do not specifically investigate the sector from either an economics or contemporary cultural benefit viewpoint.

Most of the economic research studies on the low-budget sector that does exist can be found in histories or reports that discuss Hollywood's perpetual domination of the domestic market and various attempts to alter this situation. Throughout most of the twentieth century these attempts were intended to establish an independent industry that would compete on a global scale, but over the last several decades such attempts have been more pragmatically intended to foster a more sustainable industry in partnership with the studios. This situation has often been referred to as 'Hollywood hegemony', and, for over a century it has been a major theme in debates on

the future of the British movie industry.¹¹ The history of this phenomenon, fascinating as it is, does not need to be recounted here, but two of the most cited books that chronicle this debate are Ernest Betts's *The Film Business: a history of British cinema 1896–1972* (1973) and Bill Baillieu and John Goodchild's *The British Film Business* (2002).¹² These studies are notable because both studied the economic and cultural consequences of Hollywood hegemony from a perspective that provided a precedent for the conceptualisation of this study, and both came to many of the same conclusions on the 'American colonisation' of the British market (Baillieu and Goodchild 2002: xi). For instance, both conclude that this issue had devastating consequences, that private sector attempts to operate on a global scale were futile and that much of the legislation was ineffectual (Betts 1973: 62; Baillieu and Goodchild 2002: 15).

One of the government attempts that Betts and Baillieu and Goodchild describe as ineffectual is the *Cinematograph Films Act 1927* since they, along with most movie historians, conclude that one of the consequences of the act was a dramatic rise in the manufacture of low-budget, poor-quality and quickly made films intended only to satisfy the film quota requirement set out in the law. These movies are called 'quota quickies' and their arrival started the reputation of low-budget films for poor storytelling amongst the public. However, in *Quota Quickies: The Birth of the British 'B' Film*, Steve Chibnall offers a more balanced appraisal of the economic and cultural benefits of these films than do other historians (2007). While he agrees with Betts that a rise in output of poor-quality low-budget films was an 'unintended consequence' and that the law failed to achieve its aim, what is important is that Chibnall also found that quota quickies were economically and culturally beneficial (ibid.: 3). Even after reviewing a number

¹¹ The term 'Hollywood hegemony' has been adopted from Thomas Elsaesser's *European Cinema: Face to Face with Hollywood* and is used in this study to describe the long-standing debate on how the UK film industry should respond to US studio control of its market (2005: 17). A list of the Hollywood studios involved is included in the glossary.

¹² This assertion is based on their respective one-two rankings on a Google Scholar citation listing conducted on 30/01/11.

of poor-quality films, he argued that the British movie industry ‘would have been financially, technically and artistically more impoverished’ without their production (ibid.: 249).

The history chronicled by Betts, Baillieu and Goodchild and other historians also clarifies the question that has always been at the centre of the Hollywood hegemony debate: ‘What is the best strategy for establishing an economically sustainable movie industry that will also promote British culture?’. This question is relevant because past attempts by the Government to respond to it, in particular the *Cinematograph Films Act 1927* that led to a significant rise in low-budget production, offer the context for why such attempts are unlikely to be reattempted and why the lack of any improvement in domestic fortunes in the 1990s led to an advocacy for strategies that would avoid direct competition with the Hollywood studios. These strategies would work alongside public-sector efforts to encourage inward investment for medium-budget and high-budget films intended for the global market with a strategy intended to nurture more production of better crafted, domestically focused low-budget movies.

1.2.1 Low-budget strategy proposals

Two studies that advocated lower-budget industry strategies were Steve McIntyre’s ‘Vanishing Point: Feature Film Production in a Small Country’ (1994) and Terry Ilott’s *Budgets and Markets* (1996). Though McIntyre used competitive advantage theory and Ilott used a market-based budgeting approach to suggest improvements to film-management practice, both studies advanced lower-cost/market-led business models already used successfully in other industries. Like Betts and Baillieu and Goodchild, the issue, as McIntyre and Ilott described it, stemmed from Hollywood hegemony and an uncompetitive cost base; however, instead of arguing for more public-sector subsidies or market protection, McIntyre and Ilott proposed market-based strategies aimed at improving the competitiveness and capitalisation of production firms, and

a more diversified movie economy.¹³ These strategies would be more reliant on the domestic market and did not need the same ‘economies of scale’ required for big-budget films.¹⁴

McIntyre relied on competitive advantage theory to put forward his reasoning for how a viable industry could be established based on a more balanced view of both ‘economic growth’ and a ‘national ambition ... [for] self-expression’ (1994: 89).¹⁵ He started by describing Los Angeles’ geographical position as the ‘thickest market’ where the ‘widest choice of every conceivable element necessary’ to make a film was available (ibid.: 95), the ‘widest choice’ referring in this case to access to the best talent, deal-makers, financiers, distributors, knowledge-gatherers, studios, marketers and vertically-integrated conglomerates, thus giving Hollywood a ‘massive clustering advantage’ that enabled it to dominate the global film industry (ibid.: 95–97). This ‘cluster of resources’ was not only dependent on one location, but also on a complex matrix of relationships that took decades to create and is unlikely to be replicated by any other nation in the foreseeable future (ibid.: 96). According to McIntyre, these relationships are characterised by multiple levels of integration between producers, distributors, agents, large firms and banks, that enabled the studios to maintain high levels of indemnification and economies of scale.

The source of this and other competitive advantages will be discussed later in this chapter, but what is timely to note at this juncture is that McIntyre, unlike Betts and other historians of the ‘analogue era’, went deeper in his analysis by showing that it would have required vast amounts of financial incentives, public-sector investment and the establishment of a European media hub to enable producers in ‘small countries’ to gain the economies of scale needed to compete

¹³ Early examples of an uncompetitive cost base for the domestic film industry include: a 1916 ‘shortage of capital’ that resulted from a rise in ‘production costs’ and foreign imports, and Cecil Hepworth’s bankruptcy in 1924 (Baillieu and Goodchild 2002: 17).

¹⁴ A firm can gain an ‘economies of scale’ competitive advantage (a lower cost per unit) by increasing production via an increase in variable costs and maintaining fixed costs at the same level.

¹⁵ McIntyre cites *The Competitive Advantage of Nations* (Porter 1990: 1–150).

head-to-head with Hollywood (ibid.: 99).¹⁶ Since this unaffordable level of investment was unlikely to be made, and the ‘more-or-less-impossibility of genuinely competing with Hollywood’ continued to be the status quo, McIntyre argued that there was ‘no alternative to attempting the low-budget [\leq £500k rather than $>$ £1.5] filmmaking route’ since it was the only strategy that could ‘reduce risk [to private capital], increase numbers of production and generate at least the possibility of profitability across a slate of production [*sic*’ (ibid.: 105).¹⁷

McIntyre’s proposal aimed to: (1) reduce the risk to investors by lowering budget thresholds; (2) increase the rate of high-quality productions with more investment through the use of more attractive risk/return ratios; (3) reduce the need for complex ‘presales’ contracts; and (4) avoid direct competition with Hollywood by specialising on low-budget films for the British market (1994: 103–107).¹⁸ To stimulate the low-budget mentality needed for this strategy, he relied on: an increase in ‘courses, training, seminars, information about low-budget filmmaking’; a ‘sophisticated definition of “profit” and “risk”’ that would allow investors the opportunity to achieve a financial return, but would also allow local authorities and public-sector agencies to consider job creation, tourism and cultural benefits as profitable aims; and an acceptance that ‘low-budget filmmaking ... dissolves the distinction between commercial ... and cultural filmmaking’ in ways that more expensive films do not, and therefore allows opportunities to gain economic and cultural benefits without restricting producers to projects that aim for profit only (ibid.). While the use of tax credits and public-sector investment were not discussed, their continuance was still implied in his closing argument that ‘the creation of a Hollywood-style movie industry’ in a small country ‘is not viable ... [but] a small scale, low-budget industry,

¹⁶ The ‘analogue era’ is defined in this thesis as all the years between 1895 and 2000.

¹⁷ While his aim was to ‘expand the screen industry in Scotland’, McIntyre often referenced the British movie industry (ibid.: 88).

¹⁸ ‘Presales’ is distribution rights that have been sold before the start of principal photography.

using inventive mixes of public and private money, might just be possible. And be sustainable. That, after all, must be one of the key goals of any cultural or industrial strategy' (ibid.: 107).

The budget realignment strategy proposed by Ilott also called for a more diversified industry based on a greater level of low-budget production, but in ways that were not based on, nor as explicit as, the theories McIntyre had used (Ilott 1996). One key difference was that Ilott began with the premise that the decisions of the producer will always be the main determinant of a film production firm's success. Hence, Ilott did not explicitly discount the need to understand macroeconomic factors, for instance the role of the public-sector to create a more economically sustainable industry, but the film-management aim of his work and a pragmatic acceptance of Hollywood hegemony led him to argue that the 'mismatch between budgets and audiences is one of the problems of European cinema' and that this mismatch 'is a general problem and exists apart from the question of the success or failure of any particular film' (ibid.: 1). The evidence for this assertion was primarily based on case studies of 13 European films, with the main line of enquiry being into the major decisions made by the producers and whether the films had been made for the right amount of money in relation to realistic revenue projections.¹⁹

Although Ilott admitted that 'relating markets to budgets is not easy', he began his analysis by outlining his reasons for using a market-based budgeting approach and for asking what is the 'best balance of risk between the size of the budget and the likely commercial return?' (ibid.: 1, 152). Some of his reasoning was more relevant to independent medium-budget than to low-budget production, and also included factors, such as broadcaster subsidies, that ceased to be relevant to the sector in the early-2000s; however, his portrayal of a complex European market

¹⁹ The British movies *Enchanted April* (1991), *Meeting Venus* (1991) and *Peter's Friends* (1992) were part of this survey.

that was comprised of different audiences and distribution channels offered an evidence-based argument that the behaviour of the European market was based on differing national tastes. For example, he observed European audiences did not tend to watch each other’s films even though they did watch many Hollywood-made movies, and summarised this finding by stating: ‘In France, Hollywood competes with French films, in Germany it competes with German films, and so on’ (ibid.: 14). This and other such findings led Ilott to conclude that it is an essential responsibility of the producer to conduct a market-based budgeting study as part of the planning process—an approach that has always required a comprehensive knowledge of audiences, distributors, agents and the market-based budgeting estimation method (Table 1).

MARKET-BASED BUDGETING APPROACH <i>(Tasks to be undertaken during the planning sub-process (Ilott 1996: 150–155))</i>	
1.	Create a model of the target audience: <ul style="list-style-type: none"> - <i>Is the film intended to appeal to a specialist, crossover or mainstream audience</i> - <i>Is the film likely to appeal to a domestic, European or international audience</i> - <i>Is the film primarily of interest to audiences aged under or over 25</i> - <i>Is the bulk of the film’s audience reached by cinema, video or television</i>
2.	Plot the likely audience penetration by medium and age group based on the performance of similar films in the chosen markets using: <ul style="list-style-type: none"> - <i>Genre</i> - <i>Scale</i> - <i>Stars</i> - <i>Storyline</i> - <i>Subject matter</i>
3.	Apply three levels of performance to each target audience identified based on the projected depth to which the film will penetrate its target audience: <ul style="list-style-type: none"> - <i>Good</i> - <i>Average</i> - <i>Bad</i>
4.	Calculate optimum budget based on projections

Table 1 - Market-based budgeting approach

The findings and conclusions made by Ilott are relevant because they cohere with McIntyre’s proposal for a diversified national industry more reliant on an efficient, successful and larger low-budget sector focused on the local market. This was evident from Ilott’s finding indicating that the European market was not homogeneous enough for specialist and crossover British-

made movies since it only screened a small percentage of them (1994: 14).²⁰ Even in the North American market, Ilott added, to which the UK was Europe's largest exporter and shared a 'common language and cultural compatibility', the box-office performance of UK independent films was only marginally higher than in mainland Europe, when outlier medium-budget films, such as *Four Weddings and a Funeral* (1994), were excluded (ibid.: 18).²¹ Given that Ilott also argued for specialist films to be made with low budgets, his recommendations complemented McIntyre's use of the competitive advantage theory, since it suggested that low-budget movie production avoids direct competition with Hollywood while better matching the investment and risk balance needed to have an improved opportunity to achieve a positive financial return.

These and other early advocacies for an industry-wide realignment to lower budgets based on market-based production strategies, however, occurred at a time when the entire filmmaking process was still based on analogue technology—technology that posed prohibitively high 'barriers to entry' for would-be producers, especially those with meagre financial resources.²² For instance, a prohibitively high-level of initial fixed cost investment, limited access to requisite skills and personnel, lack of appropriate business knowledge, lack of influential relationships and limited access to distribution channels. These and other barriers to entry will be discussed later in this chapter, but it is necessary to note that such barriers were likely the reason why McIntyre's and Ilott's proposals went largely unheeded by practitioners.²³ This is not to imply that their views were not significant. On the contrary, books that expand on the

²⁰ Exceptions to this were US co-productions such as the *James Bond* films. Similarly, the European Audiovisual Observatory (EAO) confirm that British independent film admissions to national admissions in 2012 were 3% in France, Germany and Spain, and 4% in Italy and North American (2013: 19). These percentages were based on the percentage allocations by the EAO for each country, subtracting the estimation for UK/US mainstream co-productions, such as *Skyfall* (2012).

²¹ It is recognised that there are numerous definitions for an 'independent film' and that Ilott even suggests that movies made by 'independent producers cease to be truly independent' when working with studio-backed distributors (1996: 155), but for clarity in this study the definition of 'independent film' will mean any movie that has not received any direct financing support from a Hollywood studio.

²² Other academics also argued for low-budget production during the 1990s, but from more of a cultural ideological perspective. For instance, Colin McArthur in 'The Cultural Necessity of a Poor Celtic Cinema' argued that a greater share of public-sector support should be awarded to projects that cost <£300k and that considered a 'degree of imagination ... working with limited resources', were not restricted by 'orthodox filmmaking practices' and dealt with the 'contradictions ... of past and present' (1994: 120–125).

²³ The films of Derek Jarman and the experiences of James Mackay are obvious exceptions to this assertion (Mackay 1992).

history the British movie industry during the analogue era, such as *My Indecision Is Final: The Rise and Fall of Goldcrest Films* (Ebert and Ilott 1990) and *The Egos Have Landed: The Rise and Fall of Palace Pictures* (Finney 1996), illustrate why low-budget realignment theories warranted serious consideration at the time since financial success using traditional studio-based business models remained elusive for even the most determined British producers. Thus, from a film-management perspective, McIntyre and Ilott made a valuable contribution to the discourse on Hollywood's hegemony, even though their budget proposals would not become more technologically feasible for another decade (Chapter Four).

1.2.2 Macroeconomic perspectives

The oligopolistic filmmaking environment that has been largely controlled by the studios for the last century, and that prompted McIntyre's and Ilott's proposals, remained relatively unchanged during the digital revolution from the viewpoint of medium-budget to high-budget movies. The published evidence for this assertion is sizable and available in economic analysis published by film economists such as Harold Vogel, Janet Wasko, Arthur De Vany and Charles Weinberg. However, in addition to substantiating the continuance of Hollywood hegemony, their findings also identify other competitive advantages relevant to the low-budget sector that McIntyre did not note. For instance, while testing 'Pareto's law' and risk relationships De Vany found that 5% of all movies released in the US from 1992 to 2003 achieved >80% of the industry's profit, and the movies that comprised the 5% were mostly owned and/or distributed by the studios (2004: 207, 214).²⁴ Thus, as well as illustrating the level of control Hollywood had in its own exhibition market at the time, De Vany indicates that the studios had a greater

²⁴ Pareto's law (aka the 80/20 rule) states that for many events, most of the effects come from a minority of the causes (Juran 1964).

ability to obtain a profit than did independent producers—profit that could be used to reinvest in new productions and in advances in technology, and to achieve higher economies of scale.

This competitive advantage was not confined to the North American market; Weinberg found that De Vany's findings could be viewed as indicating a global advantage for the studios. In his paper, 'Profits out of the Picture: Research Issues and Revenue Sources Beyond the North American Box Office', Weinberg found a high correlation of $r = 0.88$ between foreign box-office revenues and those of the North American market (2005: 172).²⁵ This finding further supported the long-held practitioner view that Hollywood not only had a monopoly on profit attainment, but that this advantage was on a global scale. The ability to derive profit, however, was not only restricted to films that did well at theatres. The studios, Vogel argued, not only generated most of their income from their control of traditional distribution channels, but also gained a return from all of their films through the use of 'big-picture accounting' methods that allowed them to maintain stringent controls over costs and to achieve higher levels of economy of scale through the cross-collateralisation of overhead costs (2007: 175–194). The studios not only still had the advantage of being based in McIntyre's thickest market, including all the consequent advantages that that entailed, but also kept control of all the means of deriving profit and limiting reported losses from films that underperformed—a situation that explains why they had access to what Vogel describes as 'ever-larger pools of capital' (ibid.: 68).

In *How Hollywood Works*, Wasko argued that 'profit' has always been the 'guiding principle' for the studios (2007: 3–4, 222). This assumption is a reasonable one, since the pursuit and eventual achievement of profit is the only means to achieve a constant and sufficient amount

²⁵ The term 'box office revenue' means in this thesis a cinema-owner's receipts from ticket sales.

of inward investment, for companies determined to maintain their position in the market (ibid.). A desire to generate profit is the reason why media conglomerates buy, merge or invest in the studios. It is also the reason why private investors, banks and venture capitalists consistently invest in film production. When achieved, profit is also the main source used to reinvest in the business, such as expanding into distribution and foreign market production—strategies that help mitigate competition and to achieve economies of scale that are impractical for other national industries to emulate. Therefore, the perpetual pursuit of profit has always been the root motive driving all of Hollywood’s economic competitive advantages, and a reason why the inhospitable competitive environment domestic producers during the analogue era persisted throughout the digital revolution (McIntyre 1994: 89).

Hollywood’s seemingly impenetrable competitive advantages, built on the profit motive that created them, and the resulting domination of an American cultural narrative in the stories told in British theatres, are important because they provide the context for why participants in the UK movie industry often set aside profit motives in preference to ‘imperatives concerned with national self-expression’ and projecting a level of ‘national identity’ (McIntyre 1994: 89). As will be explored later in this chapter, it could be argued that cultural aims were as much a theme in academic and popular discourses centring on Hollywood hegemony, as well as justifying government and public-sector actions, as was the aim to achieve a profit throughout the digital revolution. This is not surprising given the entrenched dominance of the studios that restrict opportunities for new market entrants to achieve a profit and the persistent high cost of movie production that inhibited McIntyre’s proposals from being more widely actioned, but remain important considerations in any proposals for how the low-budget film sector can make a more prominent contribution to establishing a more sustainable British film industry (Chapter Eight).

The persistent Hollywood oligopoly, and the lessons the industry learned from its past actions, were major reasons for the development of a more pragmatic government policy in its support for the British film industry (Baillieu and Goodchild 2002: 141). By the turn of the century the government had already abandoned any desire to use protectionist legislation for promotion of ‘both British economic and cultural interests, at home and abroad’, and had instead pivoted to a strategy based on ‘attracting private sector investment’ and a collaborative relationship with Hollywood (Chibnall 2007: 1; Baillieu and Goodchild 2002: 141). This approach would be to encourage investment for medium and high-budget productions from the studios—and to a lesser extent foreign ‘co-production’—by incentivising them with generous tax reliefs.²⁶ The Government also reiterated a long-held desire to promote British culture and used that as a pretext for offering similar tax incentives to filmmakers as well as funding public-sector initiatives that would simultaneously foster production for culturally beneficial films (ibid.).

The effectiveness of these initiatives was routinely reappraised by various sub-committees and the UK Film Council and its successor, the British Film Institute (UKFC/BFI). For instance, the Culture, Media and Sport Select Committee report *The British Film Industry: Sixth Report of the Session 2002–03* was the first comprehensive public-sector-led research study during the digital revolution; the aim of this report was to examine the movie industry and question the effectiveness of then ‘public policy’ to ‘generate substantial economic rewards and important cultural benefits’ (2003: 3). Among its contents was testimony from the Producers Alliance of Cinema and Television (PACT) that tax incentives had led to a rise in production, especially for lower-budget films. Specifically, their view was that the *Finance Act 1997*, ‘particularly Section 48 for smaller budget films’, was responsible for this trend, and they warned that any

²⁶ A ‘co-production’ is an agreement that is legally binding between two or more producers to produce a movie jointly.

reduction to the incentive would be ‘immensely harmful to the industry’ (ibid.: 32). This opinion is significant since it not only raised the possibility that the tax relief was affecting the low-budget supply chain in the early 2000s, but also suggested that the Government’s actions were still consistent with its self-proclaimed cultural goal of supporting the movie industry.

The reasoning for this possibility was noted earlier in the report, which quoted the Department of Culture, Media and Sport (DCMS) as stating that the ‘main reason’ why the Government supported the industry was because of ‘its cultural importance’ and a belief that it was ‘vital that we continue to make great films in Britain and about Britain, and that a wide variety of films can be seen in British cinemas [*sic*]’ (ibid: 14). The emphasis on cultural benefits over economic benefits was, and remains, an important aspect of the Government’s priorities, which helped frame the conceptualisation of this study and which will be reconsidered in Chapters Seven and Eight, but what is worth noting here is that the report corroborated a perception that low-budget producers were in 2003 benefiting from the Government’s tax incentive policies and its support for public-sector agencies with a remit to promote British culture.²⁷

Another important report published nine years later by the Film Policy Review Panel titled *A Future for British Film*, not only confirms that the sector was still benefiting from the Government’s tax relief, but that it was also receiving direct investment from the public sector (FPRC 2012).²⁸ Like some of the statements made by the select committee in 2003, the panel reiterated the Government’s motive for supporting the industry as being one not due to the

²⁷ In *Response to the Culture Media and Sport Committee Inquiry ‘Is there a British Film Industry?’* the DCMS acknowledged the Government was ‘committed to a vibrant British film industry’ that could ‘explore and challenge our history, culture, beliefs and values, and help us reach a better understanding of our culture and its place in the world’ (2003: 1). Since no economic aims were mentioned, this implied that support was based on cultural aims in the form of ‘fiscal means, deregulation and support for training and education’ (ibid.). One example of this support was the cultural test, a mechanism that will be discussed later. However, as Hill makes clear, the introduction of this test was partly an attempt to bypass the European Union requirements restricting direct subsidies of private sector industries (2012: 347; 2016: 714).

²⁸ Although the topic of direct investment by the public sector was not explored in *The British Film Industry: Sixth Report of the Session 2002–03*, the *Film Council Lottery Distribution Accounts 2001–2002* indicate direct investment programmes, specifically the Premiere Fund, New Cinema Fund and Development Fund, were established in October 2000 (2003: 2, 14).

pursuit of economic growth alone, but also by a desire to help the domestic film secure ‘its rightful place at the heart of British cultural life’ (ibid.: 6). The panel argued that to achieve this goal audience demand for UK independent films would need to be broadened, ‘from the micro-budget to the blockbuster’, and made 56 recommendations for fulfilling that aim (ibid.: 2, 95). These recommendations were intended to foster ‘a more consistent flow of culturally British films’ and some offered fragments of insight into how the low-budget supply chain was functioning (ibid.: 45). For instance, when the recommendation was made to have more producer equity derived from the tax relief in the *Finance Act 2006*, the report stated that the tax incentives were being used by low-budget producers (ibid.: 45–49). Though it prefaced its conclusions by stating that ‘a tax incentive alone is not enough to maintain a successful international industry producing culturally British films’, the report also stated that without the tax relief, and without the Enterprise Investment Scheme (EIS) and Seed Enterprise Investment Scheme (SEIS), many independents movies ‘would either not be made at all or would be made at much lower budget levels, probably being lower quality as a result [*sic*]’ (ibid.: 38, 61).

Perhaps even more relevant is the fact that most of the recommendations in *A Future for British Film* relating to the low-budget film sector are remarkably similar to recommendations made in earlier reports on the public sector. The proposals that suggested Public Service Broadcasters (PSBs) finance more production and expand their training programmes are two noteworthy examples, since similar proposals were made in the Film Policy Review Committee’s (FPRC) 1998 report *A Bigger Picture* and in the 2003 select committee report (ibid: 55–58, 70–73).²⁹ Clearly these recurrences—along with similar ideas by McIntyre,

²⁹ The ‘five PSBs’ were the BBC, ITV, Channel 4, Channel 5 and BskyB. The report made a recommendation to ‘hold meetings with broadcasters to discuss their plans for future investment in the British film industry’ and to open up opportunities for ‘people from all backgrounds’ through training (1998: 25, 28). The report *The British Film Industry: Sixth Report of the Session 2002–03* recommended that ‘increased levels of support for film production’ be achieved with the ‘co-operation with the broadcasters’ and that the UKFC/BFI should work to increase training with the private sector (2003: 45, 48).

Baillieu and Goodchild—indicate that the fundamental factors of the supply chain process had not changed during the years between the publication of these reports, but it is also interesting to note that the supporting arguments that accompanied these recommendations did not offer any evidence that such factors were in fact affecting low-budget production. Apart from the tax incentives, the only other explicit factor that the report indicated had an effect on the sector was lottery-funded direct investment. This finding is not unexpected since the programmes the report listed, such as Warp X, Microwave and i-Features, were restricted to low-budget projects, but the panel’s confidence in them was high enough for them to make a recommendation to the relevant agencies to ‘develop a strategy to build on these programmes providing links and best practice ... [and if possible] act as an online distributor as part of a strategy to revitalise low-budget filmmaking’ (ibid.: 73). While the economic effects of these schemes and tax incentives were not quantified, the report is nevertheless informative because it confirms that the government’s support for these initiatives remained relatively stable during the 2000s and was based on a motive to promote domestic culture, rather than one of achieving an economic goal only.

1.2.3 Practitioner-author perspectives

Various descriptions of the moviemaking process published by practitioner-authors during the digital revolution are also insightful, but before discussing these it is first necessary to discuss the digital revolution itself.³⁰ This is because the digital revolution altered every activity in the script-to-screen process and fused them together using a single digital technology platform: the machine-readable digital file, an invention which has its origins in the 1930s, but which by the 1990s was being used to process media content. Along with advancements in light and sound

³⁰ Specific technological advancements that are relevant to this study will be discussed in Chapter Four.

sensors, computer processors, software, metadata storage, telecommunications and projection, by the mid-2000s the digital file had become the main tool for processing images and sound (Alexander and Blakely 2014). Century-old techniques based on celluloid film were replaced with ones based on digital file formats such as MPEG-4 (.m4v), QuickTime (.mov) and XML, and since these files could be used across multiple sub-processes within a single filmmaking process, the pace and scope of innovation rose at an ‘exponential rate’ (ibid.). As will be shown in Chapter Four, these developments fundamentally favoured low-budget filmmaking and led to producers gaining new and affordable ways to finance, manufacture and exhibit their films.

As a consequence of these new technologies, many of the barriers to entry that had hindered the realignment proposals McIntyre and Ilott had advocated in the last decade of the analogue era either had lessened or no longer existed. For example, McIntyre’s view that there was a limited skill pool was articulated before there was a marked rise in the number of institutions offering filmmaking courses, such as a number of screen academies that were founded in 2005 and the National Film Academy network in 2012, all of which relied on the use of digital technology in their course instruction (Chapter Five). Many of the prohibitively high marketing costs noted by Ilott became avoidable with the advent of social media providers Facebook and Twitter (Kirtis and Karahan 2011: 267). The arrival of crowdfunding platforms like Kickstarter began to offer new funding sources to those who were often unable to secure traditional types of investment (Trigonis 2013: 21). The concentration of broadcasters in London no longer posed as big a barrier to regional production after broadband became more widely available, and the arrival of web-based platforms such as Amazon, Netflix, YouTube and Vimeo began to provide altogether new distribution channels for independent producers. Combined with a tightly-integrated supply chain based on the digital file and on ever-increasing access to high-quality cameras, technological developments such as these not only

mitigated most of the analogue-era issues McIntyre and Ilott had seen, but also had the effect of providing lower-cost-production alternatives (Alexander and Blakely 2014). Naturally, industry stakeholders began to take notice of these developments and though they seldom referenced McIntyre and Ilott, they did re-examine their own cost plans, in the context of the digital revolution.

Among the first of these stakeholders to discuss this change, albeit from an applied view, was a small group of practitioner-authors. Comprised of filmmakers like Mike Figgis, Genevieve Jolliffe, Chris Jones, Dov S-S Simens and Elliot Grove, the group started publishing ‘how to make a film’ books in the 1990s. These early guides illustrated methods that relied on analogue technologies, but after the arrival of affordable prosumer cameras and image processing tools they were soon updated to ‘low-to-no’ methods based on digital technologies.³¹ These revised manuals were also different from their earlier editions because they accentuated accessibility, affordability and simplicity of a supply chain based on the digital file format, and in so doing, helped to fuse ideas of empowerment and ‘democratisation’ with the concept of low-budget filmmaking in practitioner literature.³² Figgis epitomises the level to which these authors came to believe wholeheartedly that digital technology was democratising moviemaking when he stated: ‘Now there is no reason to prevent anybody from making a film. The technology exists, the equipment is much cheaper than it was ... the entire equipment to make a film can ... be carried as hand luggage on a plane. There is nothing to stop people making films’ (2007: 1).

³¹ The term ‘Lo-to-no budget’ was first used by Grove to describe a type of low-cost production (2004).

³² The term ‘democratisation’ is used in this study to describe the higher level of access to the filmmaking process gained by new entrants, and has been adopted from Roy Armes’s use of the term to label the greater accessibility video analogue technology gave filmmakers in the 1980s (as cited in Petrie 2002: 66).

This belief and the economic developments that created it did not, however, lead to a renewed academic interest in the low-budget realignment proposals called for a decade earlier. Indeed, except for a few notable studies mentioned later in this chapter, not only did academics largely ignore the economic implications for independent production implied by practitioner-authors, but with a few exceptions government policy also remained relatively unchanged (Chapter Five). Nevertheless, the enthusiasm practitioner-authors showed for digital technology-based supply chains arguably heralded a new attitude towards moviemaking that superseded earlier movements, such as those that followed François Truffaut's 1954 essay 'Une certaine tendance du cinéma français' and Dogme 95. This is because, like Figgis, they all exuded a confidence that cinema-level quality was now possible on a miniscule budget, and that this would almost certainly have a positive influence on an entirely new generation of British producers, who previously had long considered the established industry to be a closed shop to new entrants.

Another aspect of the work published by the practitioner-authors is that their manuals offer useful insight into how the supply chain evolved during the digital revolution and the results of this change on producers. Of course, texts like *The Guerilla Film Makers Movie Blueprint* (Jones 2003), *The Guerilla Film Makers Handbook* (Jones and Jolliffe 2006) and *Digital Film-making* (Figgis 2007) are not research studies per se, but each of these books contains an empirical description of the low-budget supply-chain at the time of their publication.³³ Their usefulness in this case is as a qualitative source on how filmmaking evolved, for their various portrayals of an increasingly accessible production process and for their 'can do' expectations that likely mirrored the mindset of a new generation of low-budget producers (Chapter Four).

³³ For example, *The Guerilla Film Makers Handbook* is based on 150 interviews from experts in each major task of the supply chain process.

This specific point can be illustrated by comparing the evolution of *The Guerilla Film Makers Handbook* over its various editions, since they demonstrate not only the speed at which low-budget film producers migrated their supply chains to digital technology, but also the extent to which they adopted and reinforced themes based on accessibility, affordability and simplicity, and in so doing fused together the ideas of empowerment and democratisation with the idea of low-budget filmmaking. For instance, in terms of gaining an indication of the speed at which the sector migrated from analogue to digital technology, a transition that broadened the creative options for low-budget producers, a survey of the editions indicates that: the 1st ed., published in 1996, featured only an analogue technology-based supply chain; the 2nd ed., published in 2000, also presented an analogue technology-based supply chain, but did mention some early digital technology-based tools and distribution methods; the 1st US ed., published in 2004, discussed a supply chain based on digital technology and included some discussion on 16mm and 35mm cameras; and the 3rd ed., published in 2006, mostly discussed a high definition (HD) digital technology-based supply chain process, albeit with some analogue camera integration.

In terms of how these manuals made the filmmaking process appear more accessible and, in so doing, influenced the mindset of a new generation of producers, a textual comparison of the introductions in the 1st and 3rd editions indicate a significant shift in tone and an implied broader empowerment. For instance, Jones and Jolliffe stated in 1996 ‘It’s true that the road to becoming a successful film maker is a rocky, often bizarre and certainly unpredictable one ... Film making can take a very long time. There are exceptions the press love to quote, but on the whole, carving out a career in film making is not dissimilar to mounting an expedition to tackle the North face of the Eiger [*sic*]’ (1996: 6). The tone and level of enthusiasm they conveyed in 2006, however, was markedly changed, with them stating that ‘Digital is here. Oh boy is it. And along with it, come welcome opportunities for new or cash strapped film makers

... HD formats for under £1k, full blown post in your bedroom, online delivery is now coming fully online ... [*sic*]’ (2006: 5). The level of influence that such manuals had on the sector is difficult to measure but will be reconsidered as part of training developments in Chapter Five.

These texts were primarily production-oriented, but there were other manuals that dissected the supply chain from more of a business viewpoint. Books like *From Reel to Deal: Everything You Need to Create a Successful Independent Film* (Simens 2003), *Successful Business Models for Filmmakers* (Sweeney 2007) and *The Producer’s Business Handbook: The Roadmap for the Balanced Film Producer* (Lee and Gillen 2010) all described the supply chain from a low-budget producer’s view and showed the same type of enthusiasm shown by Jones and Jolliffe in their manuals. For example, when explaining marketing, cash flow management, project management, financing and sales tasks, they did so by illustrating accessible business models that did not charge a fee and that were made possible by new technology.³⁴ When they stressed the necessity for a business-like professionalism through the process, they did so by saying it was the best way to take advantage of a new set of possibilities to avoid traditional barriers.

1.2.4 Specific assessments of the low-budget sector

The realisation that low-budget manufacturing and exhibition capabilities were changing at the turn of the century was not entirely ignored by academics. In fact, the first and most important journal article to call specific attention to the effects and possible consequences of the digital revolution on the low-budget sector was Duncan Petrie’s ‘British low-budget production and digital technology’ (2002). This article broadly agreed with practitioner-author assertions that ‘digital video’ had finally become a viable option for production, technically and economically,

³⁴ For example, the case studies and legal toolkits in *The Guerilla Film Makers Handbook* (Jones and Jolliffe 2006: 639–763).

and that most producers had gained the chance to ‘realise projects on very low budgets’ (ibid.: 68, 71); and, in so doing, substantiated the views of ‘major funding bodies’ that expressed the opinion that digital technology offered a new and low-cost way to increase film production and foster new talent (ibid.: 72). The essay also was the first study to: determine an average cost for a ‘conventionally made low-budget British feature’ (£2–3m); find that movies made using digital technologies cost on average less than those made with analogue film; use the phrase ‘low-budget sector’ to describe the part of the industry that makes these movies; use the term ‘digital revolution’ to describe the period of technological upheaval that was engulfing the low-budget sector at the time; and argue that, aesthetically at least, producers were focusing on achieving less expensive ways in reproducing ‘existing cinematic traditions, rather than ‘pioneering new approaches to visual language and representation’ (ibid.: 65–74).³⁵

While Petrie admits these and other ‘interim conclusions’ were made at an ‘early moment in the digital revolution’ and that it was too early to confirm the higher level of ‘personal control’ in the filmmaking process that he found had increased output or developed any new talent, he was able to argue with some certainty that low-budget producers still faced certain challenges that would have to be overcome if their digital films were to gain a significant audience (2002: 73–74). The main challenge being the need to increase the level of ‘innovation’ and ‘creative ideas’ needed to maximise the full ‘extent of digital technology’s impact on British cinema’ (ibid.: 73, 75), but he also added that if this obstacle was overcome digital technology offered an ‘unprecedented opportunity’ to ‘reinvigorate’ British film culture and foster ‘new creative voices’ in ways that differed from the ‘commercial agenda dictated by Hollywood’ (ibid.: 74).

³⁵ To support this assertion, Petrie described how *Daybreak* (2000) and *One Life Stand* (2000) were made using digital technology.

Public-sector agencies with a remit to encourage domestic production and exhibition also began to take a more overt interest in the possible consequences of digital technology on the operations of the British film industry. This was especially true for the UKFC/BFI in the aftermath of its then Chairman, Sir Alan Parker, asking producers in 2002 why they were not making films at costs that ‘reflect their market value’ (2002: 11). Like Ilott six years earlier, this was an attempt to shift the national debate to an enquiry on how a ‘sustainable film industry’ could be established within the market so aptly described by Puttnam, Walker, Hill and many others (Parker 2002: 3).³⁶ In the decade that followed this question, the UKFC/BFI began commissioning studies on all aspects of the industry. Research was done on the state of training and skills in *A Bigger Future: The UK Film Skills Strategy* (2003), on the economic environment in *Film in the UK: A Briefing Paper* (2009), on the cultural output of British cinema in *Stories We Tell Ourselves: The Cultural Impact of UK Film 1946–2006* (2009) and on the economic benefits of the industry in *The Economic Impact of the UK Film Industry* (Oxford Economics 2012). Though these works do not discuss the low-budget sector, they do offer observations about the low-budget sector that will be discussed later in this study.

There were, however, three major public-sector sponsored reports that did focus on low-budget films and that should be discussed at this point. The first of these reports, *The Relph Report* on ‘costs of lower budget UK films and their value in the world market’, studied ‘the increasing costs of lower budget British films’ that ‘too often exceed their earning potential’ (2002: 1). This was a response to Parker’s question and to the market dominated by Hollywood, but what is also interesting is that the report was undertaken during the early stage in the digital revolution and in the same year ‘British low-budget production and digital technology’ was

³⁶ It should be noted that Parker’s aim was to establish a global ‘film hub’ of creative talent, not a more vibrant low-budget sector (2002: 9).

published. This is why only three of the twenty-five films surveyed in the report used a DV format and, except for two comments remarking that digital technology may make filmmaking ‘somewhat easier’ and had the ‘potential for real cost savings’, digital technology’s impact on costs and economies of scale was not measured (ibid.: 11, 56, 60). Nevertheless, some of its business model proposals were consistent with some of the opinions expressed by McIntyre, Ilott and the practitioner-authors. Proposals such as writing to budget, better preparation, planning and training, limiting shooting ratios, using smaller multi-skilled crews and restricting shooting options (no ‘dolly’) were all consistent with their proposals.³⁷ For example, the ‘writing to budget’ proposal argued that producers making a film without a pre-signed distribution agreement should avoid budgets that exceed £500k since that was likely the maximum possible revenue that could be gained from UK television rights, and that a proposal for a ‘code of practice for lower budget films’ be established based on the then already signed 2002 Equity/PACT *Cinema Films Agreement* that will be discussed in the next section (2002: 61, 70).³⁸ However, the most important reason why *The Relph Report* is significant is that it brought more attention to the low-budget sector and signalled the need for more research.

The other two reports commissioned by the UKFC/BFI were Northern Alliances’ (NA) *Low and Micro-Budget Film Production in the UK* report on films made for ≤£50k and its addendum *Low and Micro-budget Film in the UK – Cultural Value and Potential Strategic Interventions* published six months later on the cultural benefits of the movies surveyed (2008: 2008). Like *The Relph Report* and the ‘British low-budget production and digital technology’ article, these studies are also significant since their findings: corroborated practitioner-authors’ assertions that cinema-quality images could be processed inexpensively into a commercial product;

³⁷ A ‘dolly’ is a wheeled platform that is mounted with a camera and used to create smooth horizontal camera movements.

³⁸ BBC guidelines stipulated the maximum budget for 55 minutes of drama content was £450k and for documentary content was £350k (2006).

assessed a niche of the low-budget sector that had never before been studied; offered a research-based precedent on how to define the sector by budget levels; and applied the same assessment approach used by Betts, Chibnall and others based on an economic and cultural contribution of the films surveyed. The studies also went into more depth by surveying the business models used by low-budget production firms and the cultural benefits they could have provided.

Important findings in this case included evidence that supply chains based on ‘slates of films’, such as at Warp X and Slingshot, were likely the most viable business models used in the sector during the period—especially those that were partially-funded by broadcasters (2008: 33). The importance of screening a movie at a prominent festival for averting traditional script-to-screen ‘bottlenecks’, such as a lack of sales agent and distribution, was another testimony-based conclusion (ibid.: 30). The reports also suggested that the cultural contribution of the sector was not being fully realised because films with cultural merit were not being distributed (ibid.: 15). When providing the evidence for these findings, the reports listed a much larger group of agencies and organisations that had become involved in the sector than had been noted in earlier research. The reports also demonstrated that the list of public-sector funding sources for low-budget production and distribution had grown since the publication of *The Relph Report*, thus providing evidence that a vibrant and growing sector had developed in a short space of time.

The addendum to the NA report also made a finding that should be mentioned at this point: it concluded that low-budget moviemaking ‘could have cultural benefits’ (2008: 15).³⁹ This particular conclusion, therefore, echoed some of Chibnall’s and McIntyre’s claims that both economic and cultural benefits can be gained from low-budget production. However, what is

³⁹ The *Low and Micro-Budget Film Production in the UK* was published in June 2008 and its addendum report *Low and Micro-budget Film in the UK – Cultural Value and Potential Strategic Interventions* was published in December of the same year.

unique about this NA finding is that it was based on a sample survey of films that were never released. In fact, the sole aim of this survey was to identify any ‘bottlenecks’ that might prevent films made on ‘low or micro budgets’ from ‘making their full contribution to the UK’s film culture’ (ibid.: 2). This aim seems to have been accomplished since the survey revealed that ~15% of the films studied did have a ‘potential to make a contribution’ but failed to do so because of poor distribution—an issue that will be explored in Chapter Seven (ibid.: 15).

The summary finding in these investigations—that low-budget production was beginning to change the manufacturing profile of the entire British film industry—was also starting to be corroborated in other data commissioned by the UKFC/BFI. This was evident in the annual percentage of domestic and co-production films made for £500k to £2.0m reported in their annual *Statistical Yearbook* since these types of films increased from 16% of national output in 2004 to 49% by 2008—a 206% rise over the four years that preceded the publication of *Low and Micro-Budget Film Production in the UK*.⁴⁰ Though no explicit link between this growth and the use of digital technology was included with the data used in this calculation, the case studies in *Low and Micro-Budget Film Production in the UK* did offer circumstantial evidence for the claim made by practitioner-authors that a new supply chain paradigm had been created. For instance, with the exception of one film shot on 16mm, all the fiction films surveyed in *Low and Micro-Budget Film Production in the UK*, including *Scenes of a Sexual Nature* (2006), *Limescale* (2005) and *Low Tide* (2008) were shot using only digital technology. The possibility that a groundswell of low-budget filmmaking was occurring also began to be found in other data published by the UKFC/BFI. This data became available in 2011 when the agency decided to include films made for >£500k in their yearly estimates—a decision that was made

⁴⁰ These data were obtained from production totals published by the UKFC/BFI in their annual *Statistical Yearbook* from 2000 to 2012.

as a ‘direct result’ of the rise in films made for \geq £500k to £2.0m and the findings in the *Low and Micro-Budget Film Production in the UK* report (Topping 2012). This change in the way that national production was calculated was also significant because it resulted in another 178 films being included in the 2011 total and a further 177 films in the 2012 total, thus reinforcing earlier evidence that previous estimates might have been underestimated (BFI 2014: 182).

1.3 Defining the UK low-budget film

One of the most obvious aspects of the lack of systematic focus on the sector is that there is no widely accepted definition for the low-budget film. While it is clear that the term ‘low-budget’ implies a film made with modest resources, other ‘product traits’, such as a budget limit and the types of costs included in the budget, remain unspecified and open to interpretation.⁴¹ As previously noted, *The Relph Report* and Northern Alliance reports, adopted their own definition of the sector, but neither of them have been used in any other study. This ambiguity in defining the low-budget films is also evident in the many colloquial terms used, such as art-house, cult film, B-movie, no-budget film and guerrilla film, and the multiple views as to how they should be defined (Raindance 2013: 37). For example, The New Producer Alliance (NPA) called them films ‘shot on a limited budget’ (1997: 1); Jones described them as films made by ‘small crews’ (2003: 100); and Martin Spence, of the Broadcasting, Entertainment, Cinematograph and Theatre Union (BECTU), described them films made on a ‘wing and a prayer’ by ‘grubby characters who like to call themselves producers’ and who want to ‘make a few bob’ (as cited in Jones and Jolliffe 2006: 196).⁴² While these qualitative views were never intended to be used as a basis for academic research, they do put into context the ambiguity that has existed.

⁴¹ The term ‘product traits’ in this thesis means any physical or creative attribute of a film. For example, physical traits such as runtime, budget level and technology used for principal photography, and creative traits such as the type of talent involved and type of content.

⁴² The NPA ceased trading on 16 March 2010 after operating for seventeen years.

1.3.1 Definitions of low-budget films

Since the beginning of the British film industry, many types of productions have been described as low budget. This eclectic group consists of: movies financed by studios as well as by independents; movies made by people who started their careers in the sector (amateurs) as well as by those who transitioned into it later in their careers (professionals); movies made with consumer cameras as well as with high-end cameras; movies that were extensively advertised as well as those that were not; and fiction movies as well as documentaries. Therefore, this diverse group encompasses many different styles, themes and sections of the industry, but all share one trait—that they all have been labelled as having been made with limited resources.

Although the most common use of the term ‘low-budget’ has been to describe a single movie, the term has also been used to define creative movements, sub-genres and the business remit of studio divisions. Films such as *Deep Throat* (1972), *Enter the Dragon* (1973), *Sholay* (1975), *Eraserhead* (1977), *Mad Max* (1979), *Slacker* (1990), *El Mariachi* (1992), *Clerks* (1994), *The Full Monty* (1997), *Pi* (1998), *Following* (1998) and *Open Water* (2013) have all been labelled as low-budget in popular discourse.⁴³ The creative movements ‘No Wave Cinema’ and ‘Dogme 95’, that are typified respectively by movies such as *Stranger than Paradise* (1994) and *Festen* (1998), have also been called low-budget based on their minimalist style.⁴⁴ In genre terms, films like *Night of the Living Dead* (1968), *The Texas Chainsaw Massacre* (1974), *Friday the 13th* (1980), *The Blair Witch Project* (1999), *Saw* (2004), *Paranormal Activity* (2007) and *Buried* (2010) have been called ‘low-budget horror’ films, which some authors have described collectively as a ‘sub-genre’ (Caldwell 2006: v; Russo 2014). The low-budget idea has even been used as the aim for studio subsidiaries, such as

⁴³ All these productions have a low-budget-film keyword association in their IMDb listings.

⁴⁴ IMDb describes No Wave Cinema as a ‘boiled-down ... punk guerrilla filmmaking’ and Dogme 95 as ‘minimalist’ (2013).

Disney's Miramax, Warner Brothers' New Line Cinema and Paramount's 'micro-budget division' Insurge Pictures (McClintock 2010).

There have also been attempts to define the low-budget film on a more substantial level by the industry stakeholders. For instance, the trade unions have defined 'low-budget' several times; however, unlike the previous examples, their definitions contained specific budget-threshold criteria. The first of these was in the 2002 *Cinema Films Agreement* between PACT and the UK union for performers, Equity. In this agreement, films produced for <£3.0m qualified as a low-budget films and those made for ≤£1.0m qualified as a 'Very Low Budget Film' (Equity and PACT 2002: 42). The second definition was written by the Screen Actors Guild (SAG) in the US for their own low-budget agreement, and it stated three classifications: films produced for <US\$200k, films produced for between US\$200k and US\$625k; and films produced for between US\$625k and US\$2.5m (SAG 2009: 5). Though the number of films that abided by these agreements is unknown, the fact that their definitions exist suggest that budget thresholds have been accepted as a means to contractually define feature-films in a way that would restrict the requirement for guild and union minimums to be used in determining cast and crew salaries.

The aforementioned *Relph Report*, the Northern Alliance reports and the data published by the UKFC/BFI Research and Statistics Unit (BFIRSU) each year in their *Statistical Yearbook* also used budget threshold criteria to define the UK low-budget film. In particular, the *Relph Report* focuses on movies between the £2.0m and £4.0m cost range, while the report *Low and Micro-Budget Film Production in the UK* used a tier-like definition based on three classifications that span the zero to £1.0m range (2002: 5).⁴⁵ The BFIRSU also use a tier-like definition structure

⁴⁵ The *Relph Report* did include movies made for as low as £76k and as high as £7.0m, but its focus was the £2.0m to £4.0m range (2002: 5).

to organise the data they publish in their *Statistical Yearbook*, but until 2011 they only included movies made for >£500k—an approach that excluded a large number of films until that time and is an omission that will be considered further in Chapter Three.

The definitions used in these union contracts and industry reports offer some precedents for using a budget-threshold-based definition for this thesis (Figure 1). In addition to their applied use in production codes and research, their use suggests that quantitative traits, production costs in this case, are already accepted by the industry as a basis for classifying movies. This was evident in the industry report definitions since they not only provided clarity to the ambiguous views of the NPA, Jones and Spence noted earlier, but also showed how it was possible to use such definitions to help define the scope of a project. Since budget thresholds can be precisely defined, more focused analysis can be achieved. Before considering how the product traits were chosen for the definition used in this thesis, however, it is helpful to re-consider those stated in the earlier studies and why they are not applicable to this study (Figure 1).

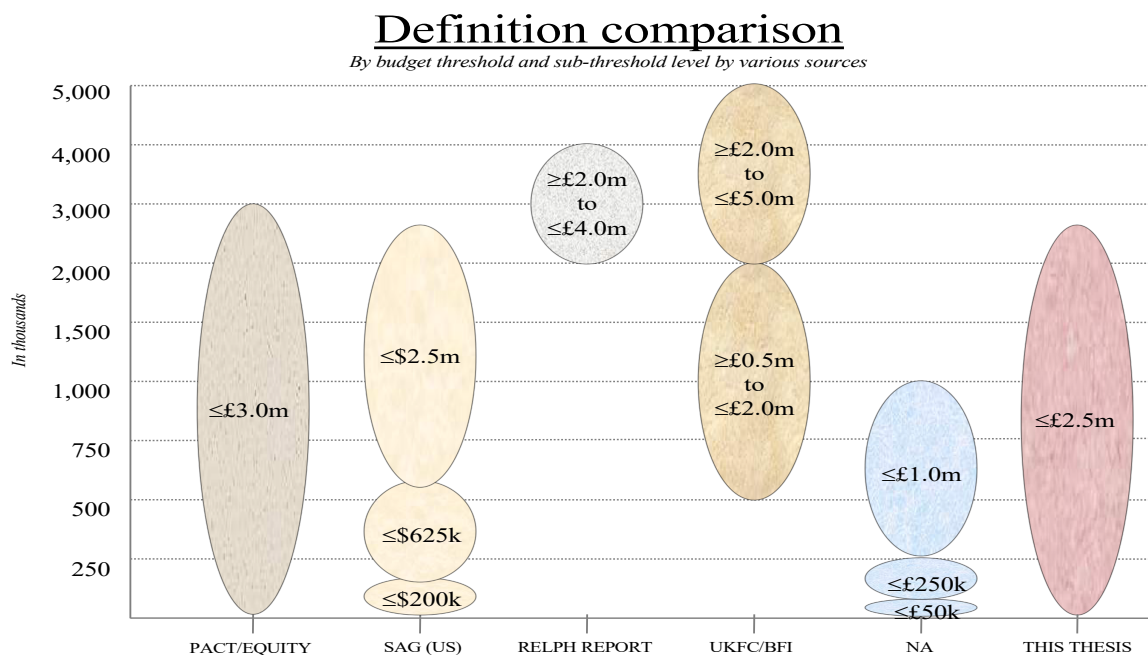


Figure 1 - Definition comparison by budget threshold level

While the definitions and findings of the aforementioned industry reports are insightful from a research conceptualisation viewpoint, it is clear that they cannot be used verbatim in this study. The definition used by *The Relph Report* is not ideal because it would exclude many of the films funded by public-sector agencies like Scottish Screen, Film London and, ironically, the UKFC/BFI.⁴⁶ The NA definition is also unsuitable because it would omit most of the expensive films surveyed by the UKFC/BFI (Figure 1). These discrepancies would therefore impede a broad enough survey that is necessary to achieve the research aim. This point can be explained by contrasting the differences between amateur-made films without a pre-arranged distribution agreement and films made by experienced producers with a pre-agreed distribution agreement. This distinction was not considered in either *The Relph Report* or the NA reports, since the majority of productions they surveyed were distributed, but this thesis surveys both theatrically and non-theatrically distributed feature-length films by amateurs and professionals alike if they have the product traits presented in the next section, traits that offer the possibility that any of these films could have made a cultural and/or economic contribution.

One way to distinguish between an amateur film and a professional movie is to consider the criteria needed for a ‘completion bond’.⁴⁷ A completion bond is essentially an insurance policy whereby a guarantor promises the investor that their production will be made in accordance with the final script if unforeseen circumstances occur. These bonds, therefore, are different from general liability insurance since they have a different function and require a high professional standard in the production process. To ensure this standard, the producer has to prove—before the start of principal photography—that a feasible production plan exists that

⁴⁶ Most public-sector schemes had a maximum budget threshold of \leq £500k. For instance, Film London’s Microwave Programme (£100k max.), Scottish Screen’s Express Film Fund (£150k max.), North West Vision + Media’s Digital Departures Programme (£250k max.), Northern Film and Media’s support via Pinball Films (£150k max.) (Northern Alliance 2008: 38–45).

⁴⁷ A completion bond is also called a completion guarantee.

not only specifies how all laws and union requirements will be met, but also how project risks will be minimised. Since the use of amateur cast and crew is viewed as an avoidable risk by guarantors, it would be reasonable to conclude that only professional movies obtain completion bonds. This conclusion is also supported by the fact that in the 2000s most guarantors charged a fee of around £40k as their minimum; it is improbable that many films made for <£1.0m would have been bonded based on this threshold.⁴⁸ While the producers of a small number of films made for <£1.0m may have been forced by their investors to purchase completion bonds, it is also likely that bonded and non-bonded films have different production characteristics. Hence, the £1.0m threshold provides a point at which a theatrical release comparison can be made between films that more likely had more stringent risk-reduction measures and those that likely did not; such a comparison might reveal potential improvements in film-management for <£1.0m productions and ways to improve the sector's contribution to the UK film industry.

Admittedly, there is a risk that the adoption of a more inclusive union-like definition that starts at zero could lead to films being surveyed that are not considered 'real movies' by the industry. Most student films, automated location recordings, family videos, moving-picture art films and other non-narrative films are in this category, but this risk can be minimised by surveying only films that have the potential to make a contribution to the industry. The approach that will be used to identify these films during the data gathering stage will be outlined in the next section and in Chapter Two, however, it is helpful to note at this point that the reasons for a minimum threshold of zero, and the assurance that only films with a contribution potential will be studied, cannot be used to justify an upper threshold above the levels used by the unions (Figure 1).

⁴⁸ Throughout the 2000s a typical fee for a completion bond was ~6% of the budget or a ~£40k minimum, with a rebate clause of half the fee if the bond was not called. If budget overruns did occur and the bond was called, production control could pass from the producer to the guarantor, who would then have been obliged to finish the film in accordance with the script. The producer was often required to take out a bond to secure finance and the normal threshold was budgets ≥£1m (Film Finance Partners Ltd. 2012). In fact, Northern Alliance found that only 5% of films made for <£1.0m in their study had a completion bond, which provides some evidence for this threshold (2008: 19).

The £1.0m bond threshold offers a useful reference point since *The Relph Report* found that films made for £1.0m to £6.0m had similar production characteristics and exhibition rates even though the circumstances of the films surveyed varied (2002: 9–20).⁴⁹ The likelihood that most movies made for >£1.0m were bonded and that their producers were forced to embark on risk-reduction measures by their bonds, and the observation in *The Relph Report* that movies made for £1.0m to £2.5m have characteristics similar to those of film made between £2.5m and £6.0m, therefore helps to narrow the focus of this study since any inclusion of productions made for between £2.5m and £6.0m would unlikely provide any further statistical insight.

1.3.2 Definition used in this thesis

It is not within the remit of this thesis to advocate a particular definition of the low-budget film. When the term ‘low-budget film’ is used simply to describe a film made with limited resources it does not need to be defined further here except to note that the vagueness of this definition was a factor that helped identify the research problem. A thesis, however, needs specific data parameters to provide it with the focus required to make a contribution to knowledge (Dunleavy 2003: 27). In fact, definitions that specify unique product traits are prerequisites for providing the research parameters needed for correlational research of the type attempted in this study (Esser and Vliegenthart 2017: 87). Since the colloquial use of the term does not offer such details on a consistent or broadly accepted basis, it must be more precisely defined (*ibid.*).

This thesis more narrowly defines the low-budget film as one that is wholly or partially made in the UK, has a runtime of >70 minutes, is narrative live-action in style, cost ≤£2.5m to make and was produced during the digital revolution. These product traits were therefore used to

⁴⁹ In terms of production characteristics, movies made for >£1.0m had broadly similar crew sizes, used the same pay rates, similar days needed for principal photography, director fees and cast fees (Relph 2002: 9–20).

narrow the focus of this study to make it more logistically feasible to achieve, and only movies that adhered to these criteria were surveyed. The earlier noted published research and the aim of this study provide the context for why these particular traits were selected, but it is also necessary to add that their selection was predicated on certain constraints: a desire to use definitions already used in previous research; the requirement to have a sufficiently narrow research topic; and the necessity to survey only films that could have made an observable cultural or economic contribution (Easterby-Smith et al. 2008). Therefore, the reason for narrowing the definition to British films only is obvious given the research aim, but the meaning of ‘British’ still requires a more precise definition since it is not detailed enough to be used as a research parameter. For that reason, in accordance with the requirements noted, the definition of a British movie stipulated by the 2007 UK ‘cultural test’, or one of the UK’s bilateral co-production treaties, or the terms of the European Convention on Cinematic Co-Production, was adopted since it provided a more definitive and consistent interpretation that led to the prudent exclusion of films not measured by the UKFC/BFI (BFI 2015: 3, 13–24).⁵⁰

The definition of a ‘feature-length’ film also required further refinement since its interpretation too is often ambiguous. For example, exhibitors have never set an official runtime requirement, and the UKFC/BFI defined feature-length using different minimum runtime thresholds during the period, including a 40-minute limit for inclusion in their Collections Information Database and an 80-minute limit for their *Statistical Yearbook* (2014: 1; 2008: 178). This situation led to the adoption of a 70-minute minimum threshold, since a 40 or 80-minute runtime threshold was not deemed appropriate for three reasons: first, that the inclusion of films from 70 to 80 minutes long did not add a burdensome amount of additional data to be gathered; second, that

⁵⁰ This definition was the only one used by the UKFC/BFI during the period. The original cultural test required: cultural content (story set in the UK or featuring UK citizens as lead characters), cultural contribution (film represents/reflects a diverse British culture, heritage or creativity), use of cultural hubs (post-production or music) and cultural practitioners (director, lead actors) (Oxford Economics 2007: 9–10).

a 70-minute minimum threshold proved to be an assessment that was both statistically representative and logistically feasible to achieve; and, third, that by excluding films with runtimes between 40 and 70 minutes, a considerable amount of effort would be saved during data collection since such films were unlikely to have a measurable economic value based on Vogel's movie library valuation theory (2007: 94–98), to be explained presently, and following from the finding that 99% of all movies theatrically released in the UK between 2000 and 2016 had runtimes >75 minutes (Follows 2016).⁵¹

Vogel's 'movie library valuation theory' is useful to introduce at this point because it provides a rationale for identifying low-budget films that have the highest potential to make an economic or cultural contribution based on product traits, such as runtime and content, and that can also be used to limit the number of movies surveyed in this thesis. This rationale is based on Vogel's argument that films with the highest potential to generate an asset value for their rights-holders are those that achieve a 'utilisation rate', which he defines as the 'degree of public exposure' a film achieves during exhibition (2007: 92–98); and that films that attain a utilisation rate exhibit similar product traits that can be used to define the scope of a quantitative research project. For instance, data compiled by Stephen Follows indicates that the average runtime for British movies theatrically released during the digital revolution was 90 minutes and that 99% of all films released between 2000 and 2016 had runtimes >70 minutes (2017). Therefore, from the perspective of Vogel's library valuation theory, it is reasonable to conclude that films with runtimes of <70 minutes would not be worth surveying in this study since they are unlikely to have achieved a utilisation rate; ergo, a measurable level of economic contribution.

⁵¹ Lowering the runtime threshold from 80 to 70 minutes increased the number of titles surveyed in this study by only 167 films.

Another common product trait observed in the vast majority of movies that achieved a level of utilisation during the digital revolution was that their content was live action in style, telling a fictional or fictionalised story (Barsam et al. 2013: 70). This observation led to the exclusion of animated films, documentaries and non-narrative films in this thesis. In fact, no animated or non-narrative films with a >70-minute runtime were found during the data collection stage detailed in Chapter Two, thus indicating that their exclusion was not going to be statistically influential. However, the decision to exclude documentaries was made for more practical reasons since: (1) these productions have already been extensively studied as a distinct group; (2) the risk of project failure would rise, from a data gathering viewpoint; and (3) these films, as a distinct sub-group, did not always exhibit the same traits found in films that had the potential to achieve a level of utilisation.⁵² Therefore, the decision to exclude documentaries was based on logistical expediency to focus on films with the highest asset value potential, rather than intended to imply that they do not have the ability to generate any asset value.

The reason why this thesis is limited to movies made for ≤£2.5m only has also already been contextualised, but in this case by the last section's discussion on why previously used budget-based definitions were not directly applicable to the main research aim. As shown in *The Relph Report*, low-budget movies that cost £2.5m to £6.0m tend to have product traits similar to those of bonded films made for between £1.0m to £2.5m; therefore, it was deemed improbable that their inclusion would have improved the accuracy of any contribution estimates to a level that would have justified the additional amount of data and effort that would have been needed to

⁵² These assertions are supported as follows: (1) *The Impact of Digital Technology on Documentary Distribution* (Nime 2012) extensively studies documentary films made during the digital revolution; (2) The decision to exclude documentaries not only reduced the number of titles surveyed by 1,797, but it also followed the history of the best film category at both the Oscars and BAFTA since no documentary has ever won these award categories; (3) Follows indicates that documentaries only accounted for 1% of box office revenue between 2003 and 2013 and 2% of production cost from 2010 to 2012 (2013). While documentaries did account for 14% of all films made from 2010 to 2012 and 8% of films distributed from 2003 to 2013, they consistently failed to exhibit any asset value traits, such as theatrical distribution and box office revenue, to the same level narrative live-action films achieved (ibid.). In a few cases, where a documentary film had significant elements of drama such as *The Road to Guantanamo* (2006), they were included in the census conducted for this thesis (Chapter Two).

study these films (2002: 5). Using a £2.5m maximum threshold therefore allowed a manageable amount of data to be gathered without compromising the statistical accuracy of any findings. The zero to £2.5m budget spectrum would also allow contribution analysis of films made for <£1.0m and provide an opportunity to compare bonded and non-bonded films across the entire low-budget spectrum. Furthermore, the adoption of a ≤£2.5m budget-based definition was based on the precedents set by PACT/Equity and SAG (Figure 1). This would not only allow for the opportunity to identify distinctions between non-bonded (<£1.0m) and bonded films (£1.0m to £2.5m), but also to test if there are important distinctions at different budget levels below £1.0m in ways that might advance the findings noted in the NA reports—for instance, to identify any differences in low-budget movies at the £50k, £250k, £1.0m and £2.5m levels. The ≤£2.5m threshold, therefore, was aligned with the definitions used by Equity/PACT and SAG and was still more inclusive than those used by the UKFC/BFI, *The Relph Report* and Northern Alliance (Figure 1).

Although this thesis primarily uses statistical analysis to assess the low-budget sector, it will occasionally augment this analysis with details of specific productions, producers and/or companies in an effort to contextualise its quantitative findings and to better substantiate its conclusions. To aid this endeavour, all the films that comprise the secondary data gathered and surveyed in this study are listed for reference purposes in Appendix A. For instance, although no authoritative evidence was obtained to confirm a film was bonded, the production profiles of: *Mean Machine* (2001), *My Little Eye* (2002), *The History Boys* (2006), *The Bunker* (2000), *The Holding* (2011), *The Magdalene Sisters* (2002), *Sex Lives of the Potato Men* (2004), *This is England* (2006) and *Bullet Boy* (2004) suggest these films were likely bonded (Figure 2). The production profiles of *Evil Aliens* (2005), *The Football Factory* (2004), *Rage*

(2009), *Ruby Blue* (2007), *Monsters* (2010), *GamerZ* (2005), *London to Brighton* (2006), *Weekend* (2011) and *The Last Horror Movie* (2003) suggest these were non-bonded (Figure 2).

UK low-budget film definition: title examples

Bonded and non-bonded films (estimated)

<i>Bonded films</i>	 <p><u>Mean Machine</u> Dir: Barry Skolnick Details: Comedy, 2001, 35mm Budget Est.: £2.5m WW BO: £4.5m</p>	 <p><u>My Little Eye</u> Dir: Marc Evans Details: Horror, 2002, 6 week shoot, WT2, DV Budget Est.: £2.0m WW BO: £3.3m</p>	 <p><u>The History Boys</u> Dir: Nicholas Hytner Details: Comedy, 2006, 6 week shoot, 16mm Budget Est.: £2.0m WW BO: £6.7m</p>	
	 <p><u>The Bunker</u> Dir: Rob Green Details: Horror, 2000, 35mm Budget Est.: £1.9m WW BO: £20k</p>	 <p><u>The Holding</u> Dir: Susan Jacobson Details: Thriller, 2011, HD Budget Est.: £1.9m WW BO: £0.0m</p>	 <p><u>The Magdalene Sisters</u> Dir: Peter Mullen Details: Drama, 2002, 35mm Budget Est.: £1.6m WW BO: £6.9m</p>	
	 <p><u>Sex Lives of the Potato Men</u> Dir: Andy Humphries Details: Comedy, 2004, 5 week shoot, 35mm Budget Est.: £1.8m WW BO: £0.7m</p>	 <p><u>This is England</u> Dir: Shane Meadows Details: Drama, 2006, 35mm Budget Est.: £1.5m WW BO: £0.7m</p>	 <p><u>Bullet Boy</u> Dir: Saul Dibb Details: Drama, 2004, 16mm Budget Est.: £1.0m WW BO: £0.3m</p>	
	 <p><u>Evil Aliens</u> Dir: Jake West Details: Comedy, 2005, 6 week shoot, HD Budget Est.: £900k WW BO: £14k</p>	 <p><u>The Football Factory</u> Dir: Nick Love Details: Crime 2004, HD Budget Est.: £767k WW BO: £623k</p>	 <p><u>Rage</u> Dir: Sally Potter Details: Drama, 2009, 3 week shoot, 35mm Budget Est.: £625k WW BO: £14k</p>	
	<i>Non-bonded films</i>	 <p><u>Ruby Blue</u> Dir: Jan Dunn Details: Drama, 2007, 3 week shoot, HiDef Budget Est.: £320k WW BO: £14k</p>	 <p><u>Monsters</u> Dir: Gareth Edwards Details: , 2010, 4 week shoot, HDCam Budget Est.: £313k WW BO: £2.6m</p>	 <p><u>GamerZ</u> Dir: Robbie Fraser Details: Crime 2005, HD Budget Est.: £300k WW BO: £4k</p>
		 <p><u>London to Brighton</u> Dir: Paul Andrew Williams Details: Crime / Drama, 2006, s16mm Budget Est.: £244k WW BO: £174k</p>	 <p><u>Weekend</u> Dir: Andrew Haigh Details: Drama, 2011, 4 week shoot, HD Budget Est.: £120k WW BO: £280k</p>	 <p><u>The Last Horror Movie</u> Dir: Julian Richards Details: Horror, 2003, 3 week shoot, 35mm Budget Est.: £50k WW BO: £4k</p>

Figure 2 - Definition title examples (bonded and non-bonded films)

To further illustrate this distinction between bonded and non-bonded films, it is useful to offer a practical application of the definition and movies surveyed in this study by briefly detailing two films that were probably bonded and two that were probably not bonded. The comedy *The History Boys* (2005) is one of the movies that was defined as a low-budget film in this study

and was likely bonded given that it cost ~£2.0m to bring to screen. Produced and directed by Nicholas Hytner and adopted by Alan Bennett from his play of the same name, this 1980s-set production has a runtime of 109 minutes, a rating of 15 from the British Board of Film Classification (BBFC), took six weeks to shoot, was filmed on 16mm and gained ~£7.0m in global box-office receipts by being released in over twenty countries.⁵³ The film was made and partially-funded by BBC Two Films, together with DNA Films and Fox Searchlight Pictures, and also received funding from the UKFC/BFI and from Screen Yorkshire. The other likely bonded film example is *Clubbed* (2009). Produced and directed by Neil Thompson, this crime/drama is also set in the 1980s, has a runtime of 95 minutes, has an 18 BBFC rating, took four weeks to shoot and was filmed using a s16mm camera. Unlike *The History Boys*, however, the film's £1.6m budget—with the exception for a £250k grant from the UKFC/BFI—was funded by venture capital investors using an Enterprise Investment Scheme (EIS) (Thompson 2008).⁵⁴ The film only gained £16k in box office receipts, but it should be noted that only 40 prints were distributed and the theatrical release was accompanied by a DVD release (ibid.).

On the low end of the budget spectrum, the modestly successful *London to Brighton* (2006) is also surveyed in this study and was probably never bonded since its £300k budget would have made it economically imprudent to buy such a policy. Produced and directed by Paul Andrew Williams, this award-winning crime drama has a runtime of 85 minutes, has an 18 rating from the BBFC, took five weeks to shoot and was filmed on s16mm. Originally conceived as a short film, the script was written over two days and had to rely on the use of 'deferrals' to complete principal photography.⁵⁵ It ultimately gained just over £200k in global box office receipts in

⁵³ Most of these countries only had a DVD release.

⁵⁴ The £1.6m budget estimate 'does not include £350k spent on marketing' (Thompson 2008).

⁵⁵ The term 'deferrals' means in this thesis the practice of deferring the financial payment of cast and crew fees until after the film has been sold or when some level of revenue has been received by the producer.

15 countries, but most of these markets only received a DVD release (Appendix B). The other likely non-bonded example is the film *Powerless* (2004). This thriller was produced and directed by Matt Daniels and tells the story of a Shropshire family and their struggles to survive a major terrorist attack. It has an 86-minute runtime, gained a BBFC rating of 12, required a six-week shoot, was shot entirely on HD cameras and was only ever released on DVD. Given that the film only cost £5k to produce and relied on a single family to source its cast and crew, it is improbable the film was bonded or avoided the use of deferrals. These films, therefore, have significantly different production characteristics to those films that are likely bonded since their production budgets are not high enough to warrant the cost of being bonded nor exhibit the professionalism of films that could be insured based on the key members of crew involved.

1.4 Industry peculiarities

There are also a number of unique industry peculiarities that shape the operations of the movie industry and which are particularly relevant to the low-budget movie sector. These ‘industry peculiarities’ have been characterised as ‘unconventional and strange’ by Andy Pratt and Galina Gornostaeva (2005: 2–3), as ‘mystical elements’ by Vogel (2007: 65), and as ‘unique characteristics that defy typical economic analysis’ by Wasko (2003: 2) because their oddness stems not only from what they are and how they affect the film industry, but also from the way these peculiarities seem to be more concentrated in the script-to-screen process—especially the low-budget movie sector—than in other industry. Their relevance to this study is therefore essential since they have been known to defy typical media economic and cultural analysis and, as such, any quantitative assessment of the UK low-budget film sector must take them into consideration. While further specifics of their relevance will become more apparent at different points later in this study, what is important to note at this stage is what they are, and what their

effects are, so that later observations in the filmmaking process, how they might have affected low-budget producers and possible future consequences can be better understood.

1.4.1 The one-off nature of filmmaking

Although not unique to the film industry, the one-off process independent producers are usually forced to employ is an important peculiarity in what De Vany labels ‘not a “normal” business’ since it inhibits producers’, especially low-budget producers’, ability to achieve lower costs via economies of scale (2004: 211). In many product-oriented industries the process used to make and deliver a product is a linear progression of activities that transforms raw materials into ready-to-use goods. The script-to-screen process is often similarly portrayed since production firms must acquire raw materials (literary rights), design the product (script development), make the product (shoot and edit the film) and use sales channels to reach the client (agents and distributors). This simplistic description was epitomised by Orson Welles when he said, ‘everything you need to know about filmmaking can be learned in two to three days’ (as cited in Simens 2003: 5). Yet, despite Welles’ patriarchal eminence, the filmmaking process is neither linear nor simple, but is instead a complex, iterative and heuristic process that has to be customised for every production (Pratt and Gornostaeva 2005: 15).

The reason for this situation stems from the unusual physical nature of the product itself since no two films tell the same story in the same way, and so every movie is different irrespective of the source of its narrative. For instance, the tale *Snow White* has been retold many times in film, but each of these movies has interpreted the story in a different way.⁵⁶ This is because there is no business reason why an existing film should be remade in exactly the same way

⁵⁶ For example: *Snow White and the Seven Dwarfs* (1937) and *Snow White* (1995) were animated films; *Snow White: A Tale of Terror* (1997) was a live action horror film; *Snow White and the Huntsman* (2012) and *Blancanieves* (2012) were adventure-fantasy films; and beyond these, there are over twenty other movie portrayals (IMDb 2013).

with the same storytelling components, since copies of the film can be distributed without the need for a new copy of the film to be produced. This is why it would have been absurd for Walt Disney to remake his 1937 version of *Snow White* with the same artists and in the same style. There have been instances when a new version of an older film has been made, but there is no need to reproduce copies of the same movie via an assembly-line process as used in other manufacturing industries. Since every film must have a different mix of creative elements so that it can differentiate itself, producers have no other choice but to use a one-off process.

There are four characteristics of the one-off moviemaking process that should be considered when undertaking economic research on the low-budget sector. The first, as already noted, is that filmmaking has always been a complex process that requires a new mix of elements for each film and, consequently, an entirely new sequence of decisions, tasks and uses of resources. Though most of these elements have been identified in popular discourse, it is impractical to attempt to list all the elements used in every production. It is, however, possible to quantify the level of complexity that one-off filmmaking entails by extrapolating empirical estimates from practitioner-authors. In their descriptions of the process, Simens (2003) and Jones (2003) list ~1,500 inter-dependent decisions/tasks, ~50 types of skills and ~300 different resources.⁵⁷ As such, a large number of process combinations are possible and complexity is multitiered in that it can be procedural, materials and skills related. This is why the moviemaking process is comparatively a more complex process than mass manufacturing processes (Grove 2004: 2).

Another attribute of the one-off filmmaking process is that it offers fewer opportunities for producers in the sector to gain economies of scale (Samuelson and Nordhaus 2010: 111). An

⁵⁷ Chapter Two will provide an example listing, but it is worth noting here that an example of a task would be to start a company, which also requires other tasks to be completed, and an example of a material would be paper to print a script.

example of this hindrance is the producer's decision whether to buy or hire a camera. If the producer makes only one film, the entire cost of that camera must be set against the cost of one film; however, if that producer makes five films it is possible to amortise 1/5 of the cost against all five movies. This has the effect of lowering the cost for each film through the use of improved cost synergies and is a principle that can be applied to any fixed assets and overhead costs. Most low-budget film producers, however, cannot gain this average cost advantage since most make only one film (Follows 2013). While there are options that offer some economies of scale, such as to hire a camera or hire a cinematographer with a camera package, the one-off process has usually been another obstacle for the sector to maximise its capital investments.

The third attribute of the one-off filmmaking process that pertains to the low-budget sector is that it manifests itself more as a build-to-sell process and has fewer opportunities to prototype when compared to studio films. In other industries that use one-off manufacturing methods, such as aerospace (spacecraft) and civil construction (motorways), the manufacturers tend to build-to-order for customers who pre-order and/or partially pay up front for a customised product. This can therefore be advantageous to manufacturers who build this way, since it enables the production process to be more efficiently financed and reduces the financial risks of making a one-of-a-kind product without a more reliable market. Independent low-budget producers often choose or are forced to use a build-to-sell process that involves distributors only after most of the physical production has occurred and that does not offer many chances to audience-test the film before the sales sub-process (Grove 2013: 23). This means that low-budget producers not only need the project management skills to simultaneously coordinate a complex production process based on a challenging schedule and budget, but also must have an almost prophetic ability to predict the needs of distributors before securing any revenue.

This situation leads to the last attribute of the one-off filmmaking process that is pertinent—the high level of project risk inherent in the process. F. Scott Fitzgerald once wrote that ‘not half a dozen men have been able to keep the whole equation of pictures in their heads’ and this is an accurate way to introduce the high failure rate that has always existed in the movie industry (1941: 4). More recently, Jones and Jolliffe described this risk by asserting that the ratio of completed scripts to those that reach the screen as 10,000/1 and of those that become financially successful as 100,000/1 (2006: 152).⁵⁸ The main source of this risk is the immense complexity of a process that requires thousands of distinct project elements to be executed on time, on budget and in a way that comes together in a market accepted manner. Based on the view that bonded films might have been more professionally project managed compared to non-bonded films, comparative analysis in this case might provide some insight into possible improvements in film-management practice. However, risks associated with the unpredictable reactions of audiences, a limited number of prototype opportunities and achieving quality are more difficult for low-budget producers to mitigate (Pratt and Gornostaeva 2005: 11–13).

Hollywood has long tried to pre-empt unfavourable audience reactions by using well-known actors and spectacular special effects, making sequels or re-boots of previously successful films and focusing on genre stories (De Vany 2004: 73, 88, 135). These are not prototype approaches per se since they entail management decisions before the production process has fully started, but nevertheless, they are often used by studios as a means to exploit an existing market and to pre-book distribution income with the aim to limit their financial risk (Slack et al. 2006: 704; Wasko 2007: 55). For the low-budget producer these creative elements are often prohibitively expensive, but practitioner-authors list other less costly prototype-like methods that could be

⁵⁸ These ratios are derived from the ‘Concept to Screen Power of 10’ diagram and it is not made clear if these numbers are industry averages or apply to only big-budget productions (Jones and Jolliffe 2006: 152).

used before a movie is released. These include the use of script readings and pre-visualisation storyboards during the planning phase and test screenings during the delivery phase.

The test screening is routinely used by the studios and is more of a true prototype method since it occurs before or soon after the movie is optioned/sold to a distributor. Its use is intended to identify any editorial ways the final film can be improved to achieve a more favourable reaction from the intended audience. The effectiveness of test screenings in reducing the risk of an unfavourable audience response by low-budget producers has never been researched and also remains controversial in public discourse. For instance, Jones first expressed a more sceptical view based on a belief that test screenings compromise a director's creative vision (2003; 373), but later he and Jolliffe would argue that 'showing your movie to an impartial audience is a vital way to tell if the mechanics of your story are working' (2006: 359). Indeed, while Figgis, Angus Finney, Art Linson and even the DCMS support the use of the method, others equally disapprove.⁵⁹ For example, the American low-budget director Kevin Smith has stated he 'hates' test screenings and 'doesn't know of any filmmaker' who benefits from using the method (*Silent Bob Speaks* 2006). What is certain is that the one-off build-to-order process, where 'every film project is unique', offers the low-budget producer fewer chances to refine their movies before they are released, and, therefore, fewer options to lessen risk (Grove 2004: 2).

1.4.2 Intellectual property rights menagerie

Another peculiarity of the industry is the creation and exploitation of intellectual property rights (IPRs), which have been particularly difficult for British independent low-budget movie producers to maintain ownership and use to finance later projects (Parker 2002: 9; Northern

⁵⁹ The DCMS stated in *A Future for British Film* that market testing 'should be encouraged by the BFI where appropriate' (FPRC 2012: 13).

Alliance 2008: 18, 23). These are critical because they offer the rights holders, generally the producers, with the legal entitlement to financially profit from their films (Finney 2010: 157–158). Vogel even describes the US studios as ‘intellectual property clearinghouses’ that are ‘contract-driven’ in their way they conduct their business (2007: 106). Through the use of copyrights, trademarks and patents, IPRs encompass every conceivable artistic element that can be merchandised.⁶⁰ From books to fast food toys, they act as major conduits by which a producer can maximise the asset value of their movie. As such, they are major generators of profit and without their existence there would be no film industry (Wasko 2007: 16–17). Yet, when these rights are exercised, they can exhibit some peculiar monetary attributes. For example, when there is market demand for a film, IPRs offer the rights holder the opportunity to extract a higher fee, by giving them monopoly power. When this occurs, the producer gains control over prices, meaning that a higher amount of profit can be obtained without incurring additional production costs. This situation famously occurred when the producers of *The Blair Witch Project* (1999) sold their IPRs for sixteen times its production cost (CNN 2002).

Another unique monetary trait of IPRs is that a film’s value can have a long duration. Unlike product patents, which last only 20 years in most countries, a film copyright can last the entire life of the creator, plus 70 years in the UK (Tate 2016: 60). The associated rights can therefore be sold repeatedly, over a long period, in ways that can provide the IPR owner with a revenue stream that can far surpass the income received from the box office as well as the original cost incurred. This is one reason why studios have built up significant values on their balance sheets from the expansion of their movie libraries, whereas manufacturing firms in other industries

⁶⁰ Examples in the film industry of copyright (©) include literary work (scripts, stories or books), moving images, music compositions, soundtracks, photographs (*mise-en-scène* components), recordings or broadcast performances of any kind. Examples of trademarks (® for registered and ™ for not yet registered) include phrases, logos, symbols and designs. Examples of patents are inventions such as toys.

often have a shorter period in which to exploit and capitalise their products (Vogel 2007: 106). The rights holders do not even have to be involved in the actual manufacturing process.

For most independent producers, however, the opportunities to extract further revenue from IPRs are seldom realised (UKFC 2011: 36). Aside from the simple logic that if a movie has no perceived value in the market then its IPRs will also not have any value in the market, the build-to-sell process often obliges low-budget producers either to pre-sell all their IPRs to a distributor in order to finance the manufacturing stage, or to wait to sell all their rights before the distribution stage when they are often facing severe cash flow issues (ibid.). Irrespective of the choice, the low-budget producer's negotiating power when selling or optioning their IPRs will typically be based on an oligopsony where few buyers are involved, and where producers are more 'inclined to secure any deal possible' (Simens 2001: 56). Hence, unless a low-budget production is exceptionally successful, the producer seldom receives any income—much less profit—to help finance their next project, since most of the revenue will remain with distributors and/or transferred to investors (UKFC 2011: 36).

1.4.3 Value is not always based on cost

The ultimate net 'worth' of an independent low-budget movie's IPRs is another peculiarity of the industry since abstract factors are often the main determinant of value instead of production costs.⁶¹ In fact, evidence will be presented in this section that suggests production costs do not always influence the price charged to customers for a cinema ticket. These industry tendencies are highlighted by Vogel when he details the 'differing viewpoints and interpretations' in big-picture accounting methods used by the studios; analysis that did not include independent

⁶¹ The terms 'worth, value and valuation' are considered from the perspective of IPR rights-holders in this section.

production firms that produce only one movie—a situation that is often the norm in the low-budget sector (2007: 164). This means that accounting methods related to inventory values, unamortised residuals and salaries are not as pertinent to assessing the value of a low-budget movie. Vogel also considers presales and how these agreements are often used to help calculate the value of independent films (*ibid.*: 164–165). In cases when all the key territories have been pre-sold, from a producer’s viewpoint, the income from these agreements could be considered a type of net worth valuation since this valuation often represents all the receipts the producer is ever likely to obtain for the movie rights. Compounding this issue, as mentioned previously, is the fact that independent producers are usually forced to use presales contracts to finance their movies; thus, pre-sale values can also represent ‘depressed sales’ in cases when they are based on heavily discounted estimations of distribution income (Jones and Jolliffe 2006: 427).

Given that it is not advisable to rely solely on the values derived from presales contracts and other similar agreements when attempting to estimate an independent film’s true net worth, how can a more accurate estimation of value be determined? Northern Alliance did find some consensus amongst sales agents of low-budget films on the answer to this question in that ‘a good film is sold on the basis of value in the market, not cost to produce’ (2008: 23), thus confirming Simens’ view that the ultimate measure of value is the response of the consumer (2003: 356). The question is therefore: Will enough people enjoy the movie? This necessitates the requirement for a qualitative dynamic in determining net worth, since most of the rubrics used to appraise public opinion are subjective in nature and any quantitative assessment of an independent film’s value will be subordinate to more crucial qualitative factors related to the level of acceptance a film achieves with its intended audience. This is why vast sums can be spent on eminent directors, famous actors, exotic locations and special effects, and the movie may still end up being valued at a level less than what it cost to be produced (Jones and Jolliffe

2006: 152). Films such as *Heaven's Gate* (1980), *The Fall of the Roman Empire* (1964) and *Battlefield Earth* (2000) all had book-value elements that should have ensured their net worth was higher than their costs, but after poor audience responses they ended up being valued less than their break-even points.⁶² Of course, low-budget producers can experience the inverse of this situation, since movies such as, *Napoleon Dynamite* (2004), *Clerks* (1994) and *The Blair Witch Project* (1999) all achieved valuations higher than their production cost after release.⁶³

The limited influence production costs have in determining the value of an independent movie could suggest that low-budget films might be better value than their more expensive medium-budget rivals, but this has not been proven in research. In fact, Vogel argues that 'it may be less risky to pay a star \$2m than to pay an unknown actor \$100k' since this may 'increase the value of the property by several times' (2007: 165). As noted, this is because studios have the option to secure a pre-sale based on the perceived value of its known talent before the film has been completed. In the low-budget sector, where unknown talent is the norm, any pre-release IPR value estimation will likely be zero. This is why a low-budget producer is at a financial disadvantage—an issue that also has the effect of discouraging investment and why the sector, along with the rest of the British industry, has always been undercapitalised (CMSC 2003: 3).

There is also evidence indicating that the prices of British cinema tickets and other exhibition formats were not directly influenced by production costs during the digital revolution.⁶⁴ While a cost-plus-margin pricing approach would suggest that a cinema ticket for a £100m film would

⁶² *Heaven's Gate* (1980) cost \$44m and gained only \$1.3m in global box office sales (IMDb 2014), *The Fall of the Roman Empire* (1964) cost \$20m and gained only \$4.8 in sales (Dirks 2014) and *Battlefield Earth* (2000) cost \$73m and gained only \$29.7m in sales (Dirks 2014).

⁶³ The film *Napoleon Dynamite* cost \$400k, yet achieved \$46m at the box office, *Clerks* cost \$27k and achieved \$3m at the box office and *The Blair Witch Project* cost \$60k and gained \$248m at the cinema (Box Office Mojo 2015).

⁶⁴ While it should be noted that Follows did find that consumers were paying marginally more on average for blockbuster and 3D movies than for 'standard 2D films' in 2015, he also found that cinemas did not vary their ticket prices in 2000 and that other factors, such as location (London's West End the most expensive), time of day, and the use of discounts, had more influence on cinema ticket prices (2015).

cost more than a ticket to see a £10m film, Vogel’s views on cinema ticket pricing elasticities are that changes in ‘box-office prices ... may be more responsive to the total cost of movie-going’ (2007: 76). Empirical evidence based on the number of admissions and box-office totals collected for this thesis support Vogel’s view (Table 2). In fact, the data suggests that cinema tickets for certain low-budget films have sometimes been priced higher than those made with higher budgets. For instance, when comparing the number one low-budget movies in terms of box-office revenue with the top-grossing films for 2000, 2005 and 2010, the top low-budget films for 2000 and 2005 had a higher average cinema ticket price than did the top-grossing movies in the same years, whereas in 2010 the number one low-budget movie was slightly cheaper to view than the top-grossing film (Table 2). In fact, there is no evidence that the prices of other exhibition formats are influenced by production costs. While Bronwyn Coate and Deb Verhoeven, have found that the timing and format of a movie’s release can be a factor (a Blu-ray Disk), they did not find any indication that production costs were involved (2014).

AVERAGE CINEMA TICKET PRICE COMPARISON <i>(Examples for 2000, 2005 and 2010)</i>						
Film Title:	Kevin & Perry GL	Toy Story 2	Confetti	Harry Potter and the Goblet of Fire	Monsters	Toy Story 3
Year Released:	2000	2000	2005	2005	2010	2010
Published Budget:	£2M	£56M	£2M	£95M	£300k	£125M
Industry Avg. Cinema Ticket Price:	£4.40	£4.40	£4.71	£4.71	£5.96	£5.96
Film Avg. Cinema Ticket Price:	£5.23	£4.73	£5.36	£5.31	£6.12	£6.21

Table 2 - Average cinema ticket price comparison

Admittedly, this analysis is not a comprehensive study across a randomly selected cross section of films nor does it consider the obvious fact that theatre owners always expect to sell a much larger number of tickets for blockbuster movies and other ticket pricing factors such as the time of screening and location of the cinema are involved (Follows 2015), but it does offer empirical evidence for the reality that production costs and exhibition prices are not always linked. The

low-budget film, therefore, seems to have a rare advantage over larger budgeted movies, if it finds a sizeable audience: the advantage that its breakeven point will always be lower than for more expensive films, but its ticket or DVD price will be relatively in the same price range and more likely to be determined by audience response and other market forces based on demand.

1.4.4 Barriers to entry paradox and power relationships

In earlier decades, vertically-integrated organisations, such as the Rank Organisation and UK-based Hollywood studios, were the only ones that could make a movie and show it in a cinema (Betts 1973: 316–317). This was because they not only had access to the limited number of highly-skilled personnel, equipment, locations and distribution network needed to carry out the script-to-screen process, but they also had the financial resources needed to meet the Minimum Production Cost (MPC) thresholds required to employ these resources for the duration of the supply chain process.⁶⁵ The need to have the access and means to pay for these resources have historically been major barriers to entry for prospective independent producers (Relph 2002: 63). While there have been occasions when independent production firms have gained a level of success, the formidable MPC thresholds needed to overcome these barriers has always been prohibitively high to the point that few have ever achieved a sustained level of success.

This situation can be better understood when considering that the barriers to entry have historically not been homogeneous in nature. In fact, it is better to describe them as three distinct types of barriers: those that have inhibited production, those that have inhibited exhibition and the inability to meet the MPC threshold required to overcome those barriers (Table 3). As noted earlier, practitioner-authors believe that many historical barriers to

⁶⁵ This should not be confused with Vogel's interpretation of 'negative cost', which he describes as the cost of production, including overhead and capitalised interest (2007: 114).

production, such as access to the necessary skills and equipment, were largely removed during the digital revolution. However, UKFC/BFI data seems to indicate that barriers to distribution do not seem to have been lessened since the number of films shown in British cinemas in 2012 was about the same as the number of films shown in 1992 (2013). The possibility that barriers to distribution continued while barriers to production and the MPC lessened are considered in Chapter Six, but at this point it is worth noting there is evidence that an economic paradox still existed between market supply and demand during the digital revolution. One where British distributors were likely more motivated to screen Hollywood films—with all the marketing benefits they provide—than screen domestic low-budget films.

HISTORICAL BARRIERS TO ENTRY EXAMPLES FOR NEW PRODUCERS <i>(All the following act to increase MPC thresholds)</i>	
Barriers to production	Barriers to distribution
<ul style="list-style-type: none"> • High initial development costs, • Lengthy development process, • Limited access to production and delivery skills, • Limited access to financial sources, • High cash flow requirement for duration of supply chain, • High risk of failure (disincentive to investors) • The need for specialist business skills, • Limited access to power relationships to gain: <ul style="list-style-type: none"> - Distribution and exhibition, - Market understanding for production planning, • High guild and union minimums. 	<ul style="list-style-type: none"> • Limited access to direct markets, • A studio oligopoly that inhibits non-guild and union productions, • A lack of power relationships, • Risk-averse domestic sales agents and distributors, • A relatively small number of domestic sales agents and distributors, • A relatively small number of broadcasters.

Table 3 - Historical barriers to entry examples for new producers

The barriers to obtaining commercial distribution are paramount in this case (Petrie 2002: 73) and can also be attributed to the influence power relationships have and to how they can impact the fortunes of producers (Wasko 2007: 4; Doyle 2012: 15). The adage ‘it’s not what you know, it’s who you know’ is believed to be a truth that affects the fortunes of many people in many industries, but Barbara Doyle argues that in the movie industry power relationships are among the most important determinants of success, and that without them it is near impossible to gain support from a Hollywood studio (2012: 72). From a UK distribution perspective, this

barrier is more complicated than knowing the right people because the domestic film industry is influenced by a small number of individuals who have the power to select who will work for established firms and tend to employ professionals who have already been successful or whom they have a personal affinity for (Grugulis and Stoyanova 2012: 1–3). Therefore, this issue not only acts as a barrier to those first-time producers who want to work in the established industry, but also relates to why the industry tries to mitigate financial risk by using proven personnel.

To contextualise the level of difficulty aspiring producers faced in forming power relationships, during the digital revolution the nation had only three major terrestrial broadcasters (BBC, ITV and Channel 4), Pinewood studios and 15 public and private sector organisations that invested in production. There were also ~50 other distributors that specialised in IPR exploitation and ~50 other firms that offered specialist services, which together equated to ~10% of the movie economy of Los Angeles (FDA 2014; Pearl & Dean 2014). The available number of influential people, therefore, was comparatively small, but Doyle adds a further complication based on the opinion that relationships must always be based on mutual trust (2012: 72). Though it is possible to initiate these relationships through surreptitious means that usurp normal business processes, they must eventually be based on trust that has been earned from previous successes that were beneficial for all concerned (*ibid.*). This situation is, of course, not unique to the film industry, but it is particularly relevant to industries with high levels of risk and where ‘nobody knows anything’ (Goldman 1983, cited by De Vany 2004: 220). The attainment of this trust is difficult for an aspiring low-budget producer since it is reasonable to conclude that the chances of profit and prestige are higher for a person who has already been successful than for one who has never made a film. It is also the reason why it is easier for an established producer to make a new film since they can leverage their already trusted relationships with people who can, in

turn, be used again to help secure the resources they need. This situation, therefore, provides experienced producers with a perpetual and an ever-increasing advantage over new producers.

In addition to the perpetual advantage success provides those already fortunate enough to be in the industry, a further complication for the new low-budget producer is that power relationships are not always predicated on the strength of their own abilities or the merits of the projects they represent. The 2014 Creative Skillset Survey and the *Survey of Entertainment Professionals* (2012) suggests a number of reported cases of nepotism, sexism, ageism, classism, racism and even cases of a person's religious and political beliefs occurred during the digital revolution (Grugulis and Stoyanova 2012: 1–3).⁶⁶ There are two results that arise from these indefensible practices; the first is that these practices could prevent more meritorious talent and projects from entering the industry and, the second is that they could burden it with unnecessary economic inefficiencies.⁶⁷ The economic repercussions of these practices on the domestic motion-picture industry, particularly the lives of those involved, were likely to be considerable. However, irrespective of how power relationships are begun, they can never endure without success—a fact that strengthens the practitioner-author assertions not only that first-time producers who achieve success on their own create for themselves an opportunity, but also that the sector can always be a useful testing ground to identify true talent (Doyle 2012: 72).

1.4.5 Commercial art form

The last peculiarity is the commercial art form characteristics of a movie (London Economics 1992: 22). This is because a film is unique, when compared to other products like a toothbrush

⁶⁶ The annual Creative Skillset Survey showed a downward trend for ethnic minorities—but an increase in women (2014: 4) and the *Survey of Entertainment Professionals* found the 'British film and TV production industry continues to be dominated by members of the middle class who hoard career opportunities and benefit from family connections' (Grugulis and Stoyanova 2012: 1–3).

⁶⁷ While no research could be found on the economic effects of nepotism on the British movie industry, there is some empirical data. In particular, the achievements of Oscar-winning offspring of famous filmmakers has been used to defend the practice (Barbara Broccoli, Sofia Coppola, Angelina Jolie), whereas the negative aspects of Hollywood exclusivity have been explored by Justin Samuels (2011) as well as how nepotism can cause inefficacies (Singell and Thornton 1997).

or a car. It could even be argued that a film is not a product at all, but a hybrid commodity that has a mixture of commercial and artistic elements. Lord Richard Attenborough once described films as a ‘commercial art form’, and this is an appropriate phrase to introduce this peculiarity (National Heritage Committee 1995: 210). This is because a film not only acquires commercial traits after it has been made, but it also attains non-commercial traits similar to works of art (paintings or sculptures). The distinction between a product and a work of art is important and needs to be emphasised since it is derived from the motives of the producer and helps explain a key difference between the low-budget sector and the profit-driven studio-centred industry Wasko describes (2003: 2–3). This distinction begins with the business truism that commercial products are made to address the needs and wants of consumers in a way that achieves a profit motive for the manufacturer (Kotler et al. 2012: 14), whereas works of art—‘art films’ in this case—are created by artists for a ‘specialised audience’ or purely for themselves and who often are more motivated by the need to create something with aesthetic value (Branston and Stafford 2006: 116–117). Of course, these two extremes are not mutually exclusive since it is possible a commercial product can have artistic merits and a work of art can result in a financial profit to its owner, but in the low-budget sector these extremes are more often observed (ibid.: 117).⁶⁸

The degree to which any movie is perceived to be either a commercial product or a work of art varies because a film’s artistic merits can only be measured subjectively. This presents several complexities from a quantitative research perspective. The first is that when works of art are considered an ‘expression or application of human creative skill and imagination ... to be appreciated primarily for their beauty or emotional power’, their merits can be judged in many different ways, including by measuring the opinions of audiences, critics and academics

⁶⁸ Branston and Stafford note *Amélie* (2001) and *Hero* (2002) as two examples of art films shown in multiplexes (2006:117).

(Oxford Dictionary 2013). As such, the full extent of a movie's artistic merit and cultural contribution to cinema cannot always be observed solely from its *mise-en-scène* but must also include the reactions of the public. The second complexity is that the producer's motives are particularly relevant, since they are an indicator for identifying the artistic credentials of a movie, especially those that have been produced for primarily creative reasons. The Metro-Goldwyn-Mayer Latin motto *ars gratia artis*, or 'art for art's sake', succinctly describes a film that was made primarily for artistic reasons. If this was not complex enough, other individuals in the filmmaking process might have different motives; thus, a director might be motivated by more creative desires and a producer might be more motivated by financial objectives.

This situation has inevitably led to a disparity between varying interpretations of the merits of different films, and hence, different feature films are viewed as being more commercial or more artistic than others (Branston and Stafford 2006: 117). The varying interpretations in this case can be illustrated by contrasting the likely main motives for producing a studio blockbuster and those for making a low-budget movie. For instance, high-budget blockbusters are often made by producers in order to address a specific demographic market and to achieve a profit objective (Wasko 2007: 36, 55). The *James Bond* and *Harry Potter* franchises typify films of this nature in that they are, from the onset, made for a global audience and are budgeted based on the aggregate value of all of their ancillary IPRs. These films have famous actors and expensive special effects and are usually promoted with campaigns that cost more than the production of the film itself (ibid.: 188–189). Hollywood-backed films that are made mostly for commercial reasons, however, do not always have a high budget; for example, it could be argued that

Disney's direct-to-video *The Little Mermaid II: Return to the Sea* (2000) and *The Fox and the Hound 2* (2006) were also made for a specific market and primarily for commercial reasons.⁶⁹

The motives for low-budget film producers, however, appears to be more convoluted and more representative of the two extremes in motivation. For instance, in *Low and Micro-Budget Film Production in the UK*, a much greater prevalence of *ars gratia artis* motives was observed in producers of likely non-bonded movies (Northern Alliance 2008: 21). After acknowledging that the 'precise motivations of filmmakers are individual and various, the report concluded that there were 'generic categories': the first being those that embark on movie production using a 'business model which is well-constructed and evidence based'; those that regard the production process as a 'learning experience almost regardless of the outcome for their film, and value outcomes in terms of knowledge gained and lessons learned'; and those that feel they are 'unsupported by (or even oppositional to) the mainstream industry' and make films because 'they can ... because they want to ... [and] ... hope that the movie will be seen' (ibid.: 21–22).

These types of *ars gratia artis* motives and how they often accompany more profit motives are also found in low-budget films that are likely to have been bonded. Neil Marshall's low-budget werewolf-horror *Dog Soldiers* (2002) is one such example. Made for approximately £1.5m, this directorial debut has been called 'one of the best British horror films' made during the digital revolution, but even though Marshall's main motive was based on a 'desire to make a distinctly British werewolf film', the motive of the producer, Dave Allen, was to produce a film that would fill a gap in 'the international market for horror films and achieve a specific level of financial success' (Rotten Tomatoes 2014; Fangorsmic 2005). Producers, especially

⁶⁹ The budgets for both of these productions directed by Jim Kammerud were ~20% of the budgets of their predecessors (IMDb Pro 2014).

producer-directors, have also expressed *ars gratia artis* motives. One likely bonded production example is Steve McQueen's *Hunger* (2008). Though it is probable that Film4 conducted a potential IPR revenue-to-cost analysis on this £1.63m film before approving it for production, its non-commercial narrative and McQueen's 'paramount need to tell his story' suggest a financial return was not the main motive that brought it to the screen though McQueen himself was one of the producers (BBC 2008). Movies like the ones Marshall and McQueen made are atypical in a commercial sense since they achieved an extensive international release (Chapter Six), but they suggest that any gulf between mutually exclusive profit and artistic aims can be overcome if low-budget movie producers adopt a dual motive approach.

The relevance of all these 'film-industry peculiarities' is that they provide an essential context for interpreting the results of quantitative analysis of the low-budget film sector that would not otherwise be apparent. Their pertinence will be made clear in later chapters, where it will be shown that output increased without any rise in the use of traditional distribution in absolute terms—trends that cannot be explained by economic logic alone since it would be illogical for manufacturers in most industries to increase their output without an increase in demand. For that reason, it is essential these peculiarities are understood so that the decisions of low-budget producers, and the consequences of these decisions, can then be more accurately assessed.

1.5 Outline of chapters

In this Introduction, it has been established that the research problem is that the low-budget sector has been under-researched during the digital revolution in terms of how it can be defined, its characteristics, its contributions—economic and cultural—and its potential in a digital age to help foster a more sustainable British motion-picture industry. The chapter also presented the context for the research, questions, aim and scope of this thesis. This was followed by an

explanation of the possible reasons why low-budget movies have seldom been explored in academic research, within the context of a literature review, and why new research can now be justified based on the arrival of new technology. It was also noted that feature-length non-documentary movies made for \leq £2.5m between 2000 and 2012 would be the only feature-length films assessed and that this definition deviates from definitions based purely on budget thresholds such as have been used in previous research. The chapter also provided an overview of the industry peculiarities that are particularly relevant to quantitatively evaluating the sector since they defy typical economic analysis in comparison to other industries.

Chapter Two, 'Research Methodology', will begin with an overview of the methodology used and of how it was conceptualised. This will include an explanation of why a quantitative perspective, a positivist epistemology and a supply chain framework were chosen as the main research design elements. This explanation will also include the reasoning as to why other research models and/or theories have been used, including the movie producer's viewpoint and the growth-from-innovation hypothesis. The research method and approaches used will also be examined regarding how they will address the problem, questions and aim of this thesis.

Chapter Three, 'Production and Sector-to-Industry Estimates', will present an entirely new set of production estimates so that an accurate appraisal can be made of the sector's output and its relative position within the domestic film industry. These estimates will be derived from a more comprehensive collection of sources and confirm the most rapid increase in British moviemaking history. These estimates will then be scrutinised in terms of year-to-year trends at the industry and sector level to clarify why the digital revolution appeared to be affecting the sector differently from the way in which it affected the rest of the industry.

Chapter Four, ‘The Supply Chain: Tools, Tasks & the Digital Revolution’, will be the first of four chapters that will discuss changes observed in the supply chain. The focus will be the main technological developments that occurred during the trends noted in the previous chapter, including analysis on the speed and extent with which low-budget filmmakers abandoned analogue technology-based tools and processes in favour of those based on digital technology. This will also include tool analysis and case studies, which will demonstrate how technology gave producers new ways to improve the quality and efficiency of their supply chain processes.

Chapter Five, ‘The Supply Chain: Planning & Sourcing’, will be the second of four chapters that will discuss changes observed in the supply chain. In this chapter the focus will be on the level and type of change that occurred in planning and sourcing decisions/tasks and whether the changes that were observed fuelled the rise in output presented in Chapter Three. This analysis will be based on trends in public and private-sector financing, an expansion in regional production and a higher, a deliberate public-sector-led expansion in training programmes and institutions, and a more evenly distributed national skill base.

Chapter Six, ‘The Supply Chain: Manufacturing & Delivering’, is the third of four chapters that evaluate changes that took place in the supply chain process and how such changes relate to the findings described in Chapters Three and Four. The focus will be on the level to which the production and delivery sub-processes became more efficient as a result of technological developments, and how such changes might have affected the decisions of producers. This will include new evidence on the average duration and investment needed, how the use of exhibition formats and agents evolved and the extent barriers to entry were removed.

Chapter Seven, 'The Supply Chain: Evaluations', is the last of four chapters that consider the causes and effects of changes that occurred in the supply chain and how such changes relate to findings noted in earlier chapters. However, unlike Chapters Five and Six, this chapter will not be solely concerned with sub-process changes per se, but will instead offer a new estimates on what the sector created in terms of economic and cultural contribution to the UK industry. For this reason, this chapter will present a customised economic estimate and a cultural benefit analysis derived from a review of sector performance in festivals, in reaching niche audiences, and in broadening diversity in both the types of narratives told and directors involved.

Chapter Eight, 'Conclusions and Recommendations', will review the main findings presented and augment this review with further analysis and conclusions. The thesis will then note how the analysis presented addressed the problem, questions and aim noted in Chapter One. It will also review how this thesis made a contribution to academic knowledge in the fields of media arts and economics and film-management scholarship. The Chapter will then offer some closing thoughts on the future areas of research and the importance of low-budget production.

2. RESEARCH METHODOLOGY

The lack of contemporary research on the low-budget movie sector, particularly in terms of its economic and cultural contribution to the wider domestic industry and in terms of how digital technology influences its contribution, was identified in the previous chapter as an important research problem. This gap in the existing literature is therefore a legitimate focus for enquiry in the fields of British media arts, movie economics and film-management practice. To address this gap, this thesis aims to advance scholarly understanding of the domestic industry and film-management practice by means of an economic and cultural assessment of the sector during the digital revolution. This aim offers the opportunity to answer questions that have not been addressed in previous academic study. In particular: ‘What changes occurred in the size of the sector?’; ‘How did new technology affect the filmmaking process?’; ‘What was the sector’s economic and cultural output?’; and ‘What are the possible implications for future production, exhibition and government policy?’. This chapter outlines the methodological process used to respond to those questions by describing how the research was conceptualised, the framework, elements, methods and research approaches used and the main limitations of the methodology.

2.1 Research design and early conceptualisation

This thesis is primarily a quantitative investigation of the low-budget movie sector. Its research design was based in a positivist epistemological approach, which holds that certain ‘realities’ can be expressed numerically (Easterby-Smith et al. 2008: 57; Heywood and Stronach 2005: 116). This approach stresses an objective world, and that size measurements and quantification can be useful ways of learning about it; including quantitative methods such as correlational analysis and descriptive study (Easterby-Smith et al. 2008; Glatthorn and Joyner 2005: 40). This is in contrast with more interpretivist epistemological approaches, which place greater stress on narrative understanding of those aspects of reality that are more difficult to translate

into numbers without loss of meaning; an approach that favours the use of qualitative methods such as unstructured observations, interviews or case studies (Heywood and Stronach 2005: 346). While the focus here is on positive questions which can be answered with numerical data on a large group of films, it does occasionally discuss the individual aspects of certain movies.

The decision to use a positivist epistemological approach as the overall research design of this study was made early in the research design process, between September 2007 and July 2008, and motivated by the nature of the research questions stated in Chapter One. These questions are suited to being answered with measurements and relationships searches that use objectively collected and analysed numerical evidence (Easterby-Smith et al. 2008: 57). As John Latham argues, this 'alignment' between type of question and approach is an important consideration since it is essential that the perspective and epistemology chosen is 'consistent and congruent' with the research problem and aim (2016: 13). Given that a positivist epistemological approach appeared to meet this requirement and could be designed using rudimentary definition criteria (Glatthorn and Joyner 2005: 40), the decision to use this approach also led to correlational and descriptive analysis approaches being employed. The specific application of these approaches will be discussed later in this chapter, but it is worth noting at this point that these methods too were 'consistent and congruent' with the problem and aim of this thesis (Latham 2016: 13).

The next important decision made early in the research design process was the selection of the other research elements that would be needed. This decision was not only an essential step in determining the overall the research framework; it was also a decision that confirmed that the thesis questions could be addressed in a logistically feasible project. The conceptual structure used to appraise the suitability of each element was Latham's research design approach (2016). It offered a coherent process for identifying, testing and selecting the research elements that

were most aligned to the research questions before the start of labour-intensive data collection activities (ibid.: 48). As with the decision to use a positivist approach, the ‘alignment principle’ was the main criterion used to determine if a research element was congruent to the aim of this thesis and suitable to being used to answer the research questions (ibid.: 13). The use of this approach led to the identification of five research elements based on Glatthorn and Joyner’s basic definitions for the most commonly used research perspectives, methods and approaches (2005: 39–45). These five elements were: the main perspective, epistemology and approach already discussed; the overall research framework; interpretative perspectives; the research method; and the research approaches. An overview of these research elements, their purpose and the specific reasons why they have been selected will now be explained in detail (Table 4).

MAIN RESEARCH DESIGN ELEMENTS OVERVIEW <i>Definitions of research elements based on Easterby-Smith et al. (2008); Glatthorn and Joyner (2005)</i> <i>Research design elements adopted from Latham (2016)</i>	
Research element groups	Research elements selected
Overall research design	<ul style="list-style-type: none"> ▪ Quantitative perspective ▪ Positivist epistemology
Overall research framework	<ul style="list-style-type: none"> ▪ Low-budget supply chain framework Needed to provide a data resource and means to: <ul style="list-style-type: none"> - Identify the most pertinent decisions/tasks that might be quantitatively measured using secondary sources - Test if a broad enough study could be done that might offer insight on how the entire script-to-screen process evolved during the digital revolution - Confirm enough data might be obtained to identify changes in risk and film-management practice - Confirm the framework could be used as the overall research presentation structure
Interpretative theoretical perspectives	<ul style="list-style-type: none"> ▪ Producer’s viewpoint Needed to provide a means to: <ul style="list-style-type: none"> - Isolate and interpret data related to reasons for why changes occurred in the supply chain - Isolate and interpret data related to changes in approaches used in film-management ▪ Environmental scanning analysis theory (PESTEL/SWOT) Needed to provide a means to: <ul style="list-style-type: none"> - Isolate environmental factors of most change - Conduct final assessment analysis ▪ Growth-from-technology theory Needed to provide a means to: <ul style="list-style-type: none"> - Interpret changes in technology use

Research method / data collection	<ul style="list-style-type: none"> ▪ Total production census Needed to provide a data resource and means to: <ul style="list-style-type: none"> - Establish a new production estimate for the sector - Analyse changes in technology used in the supply chain process - Analyse changes related to producer decisions in the supply chain process - Estimating economic contribution - Estimating cultural contribution - Estimating strengths and weaknesses of the sector - Identify relevant findings to film-management practice - Identify relevant findings to public / private sector groups
Research approaches / types	<ul style="list-style-type: none"> ▪ Descriptive approaches: Needed to assess: <ul style="list-style-type: none"> - Production data (economic): * time series, groupings and percentages - Technological environmental data (economic): * time series, groupings and trend smoothing - Supply chain analysis (economic/cultural): * time series, geographic, averages, groupings, percentages, listings, ratio analysis, frequencies and totals - Measurement of Economic Activity analysis (economic) * totals - Film festival participation analysis (cultural) * groupings, totals - Audience reach analysis (cultural) * groupings, totals - Talent diversity time series analysis (cultural) * groupings, totals ▪ Correlational approaches: Needed to assess: <ul style="list-style-type: none"> - Production data (economic) * standard deviation (σ) comparison - Supply chain trends analysis (economic/cultural) * comparison between production and technology developments - Talent diversity trends analysis (cultural) * comparison between totals and technology developments

Table 4 - Main research design elements overview

2.2 Research framework

To answer the research questions posed in this study an overall research framework is required: (1) to serve as a means to identify the types of quantitative data needed; (2) to have a structure to coherently present all the findings; (3) to help contextualise the findings and (4) to help limit the project scope to a feasible level (Latham 2016: 47). For this reason, a framework has been adopted based on a rudimentary version of the ‘supply chain model’ (SCM), first defined by Keith Oliver in 1982 and later advanced by Peter Drucker, Henry Mintzberg and other influential management theorists. The supply chain model selected in this case achieves these

requirements by providing a systematic tool to identify major aspects in the script-to-screen process that can be statistically measured, and at the same time provides a research structure.

To explain the reasons for this decision it is first necessary to note that the SCM is usually used to assist executives manage complex manufacturing and delivery processes that comprise many different tasks, skills and resources (Slack et al. 2006: 402). The SCM offers a means to deal with such complexity and assess every stage of a process, starting from the acquisition of raw materials through to the final delivery of the product or service. This approach necessitates the itemisation of every task in the process, including all the costs, personnel, skills, tools and time needed, and a consideration of how tasks depend on each other (ibid.: 404). Thus, the model can be based on a positivist view of quantitative data and include the identification of factors that influence process efficiency, performance measurements and output estimates (ibid.: 402). As such, the purpose of the SCM is to achieve the most efficient and effective supply chain possible, and this utility is why it is widely used in most industries—except the movie industry.

While recognising the SCM's functionality, it should be noted that the most prominent process analysis method used in the film industry is the 'value chain' model, devised by Michael Porter (1985). In contrast with supply chain management's focus on process efficiency through better resource allocation and task sequencing, the value chain model's purpose is to assist businesses determine long-term strategies through an understanding of what consumers value (Eliashberg 2006: 639).⁷⁰ As such, a SCM process study would emphasise how delivery systems could be improved, a value-chain process study would instead start with the customer's perception of value and then work back through the decision/tasks that comprise the process to identify those

⁷⁰ The 'value chain' is a term that describes the activities a firm needs to facilitate or undertake in order to create pre-measured customer value.

that customers do not value and could be omitted (Figure 3). This view offers a more strategic measure of competencies, which has led to the value chain model being widely used by public-sector agencies, movie-industry associations, media firms, educational institutions and media business professors such as Lucy Küng, Jehoshua Eliashberg and Peter Bloor.⁷¹

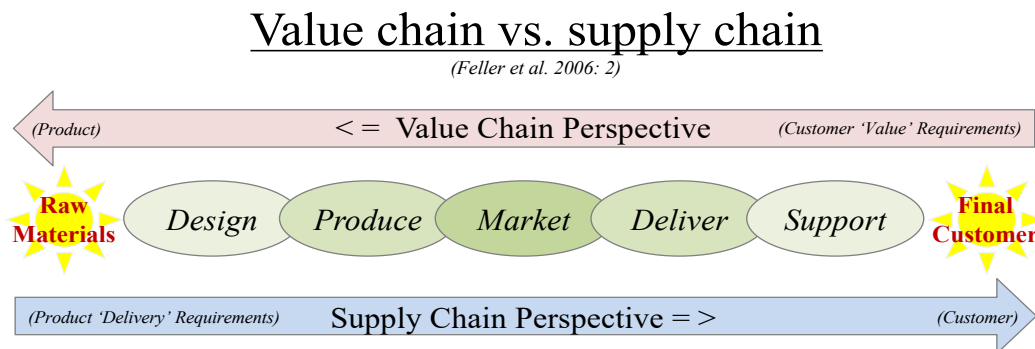


Figure 3 - The value chain vs. supply chain

Notwithstanding the popularity of the value chain model in the industry, it is not ideally suited to being applied to the low-budget film sector. Its market-based focus, which tries to match a perception of customer value with the competencies in a delivery process so that a corporate strategy can be determined, are aspects that are more relevant to the studios or macroeconomic film industry analysis than to a sector that is more often characterised by the extremes of the peculiarities discussed in the previous chapter—particularly the *ars gratia artis* motive for production. In fact, it could be argued that the SCM was the only framework that can ever be used on the low-budget sector since it is more reasonable to believe that low-budget producers, irrespective of their personal motives, are more concerned with efficiently managing their costs and making ‘their film’ because ‘they can’ rather than generating a gross profit from consumers

⁷¹ For example, the UKFC/BFI began basing their strategic plans on value chain theory in 2003 and used it again in *UK Film: Digital innovation and creative excellence report* (2010), *Statistical Yearbook* (2010) and *Future Film Value Toolkit* (2007). PACT used it in *Independent Production Sector* (2009) and *Submission to Digital Britain Review Second Phase* (2009). Value chain principles have also been taught at the Edinburgh Skillsset Screen and Media Academy, Edinburgh Napier University in 2014 (*MFA Advanced Film Practice course*).

(Appendix C). The assertion that the SCM is more suitable for low-budget film sector analysis is also augmented by how it can be used to identify quantitative data that can be used to measure economic and cultural outputs and the effect new technologies have on a process—reasons that justify a research framework divergent from past industry practice and will now be explained.

2.2.1 The basic filmmaking process and supply chain model

Any application of the SCM to the low-budget film sector should begin with an understanding of the basic components of the moviemaking process. As noted in the last chapter, practitioner-authors have published many books on how to make a low-budget film, but despite their diverse contributions on the topic they all essentially describe the process by listing the same sequence of tasks and resources. This is clear from the uniform manner in which the filmmaking process is described as a linear list of tasks that begins with rights acquisition and is followed by script development, planning, securing, filming, editing, marketing and distributing (Figure 4). When discussing this list, they often use analogies, such as describing the it as the number of cheques a producer writes (Simens 2003) or as ‘twenty-five blueprints’ (Jones 2003), or with terms such as ‘pre-production’, ‘production’ and ‘post-production’ (Ryan 2010). As such, these and other depictions imply an ordered assembly process that can be applied to any film. This description may be a pedagogically appropriate simplification for new entrants, but it is not suitable for academic research design, since in truth the process is neither universally linear nor ordered. Instead, it is a highly complex and risky process that always requires a customised approach involving multiple dependencies, reiterative cycles and a unique mix of resources.⁷²

⁷² Dependencies are factors that determine the order of activities in the supply chain, such as skills, time parameters and prerequisite materials.

Basic film-making process

(Adapted from Figgis 2007; Grove 2004; Jones 2003; Simens 2003; Vachone 2007)



Figure 4 - Basic filmmaking process

There are many versions of the SCM that are designed to assess ‘highly complex manufacturing processes’ (APICS 2009).⁷³ These models can be applied to the filmmaking process and can accommodate the industry peculiarities like the sector’s *ars gratia artis* tendencies discussed in the last chapter. One SCM that has these capabilities is the supply chain operations reference tool (SCOR) by the American Production and Inventory Control Society (APICS). This model has been described as the ‘de facto standard employed in academia and industry’ (Ntabe et al. 2015: 310), and was the only one found to have been used on the movie industry (Handfield 2012).⁷⁴ Comprising ‘four pillars’ (task modelling, performance measurements, best-practices and skills) that can be used in a single analytical framework and for evaluating management processes that have many concurrent sub-processes, practices and performance metrics (APICS 2009). This particular SCM, therefore, is a framework that can be used to study any production process using any or all of its four pillars, at any ‘breadth or depth’ of detail needed, and this gives it considerable functionality that is in excess of what is required in this thesis (ibid.).

The ‘process modelling’ pillar, including its ‘distinct management processes’ component, is one part of the SCOR that is particularly applicable to this thesis since it can be used to further develop a description of the basic filmmaking process into a more detailed study of all the

⁷³ For instance, the SCM by the Supply Chain Forum (2015), the SCM by the Supply Chain Resource Consortium (2002), the Six Models by Magaya (2016) and the process classification model by the American Productivity & Quality Center (2015).

⁷⁴ The SCOR scorecard was used in *A Supply Chain Study of the Economic Impact of the North Carolina Motion Picture Industry* (2012).

major ‘producer decisions’ required to make a movie (ibid.). This more detailed study includes the interdependencies, non-linear order and possible consequences of such decisions which are not apparent in the practitioner-authors’ descriptions. In this way, the SCOR’s supply chain management component offers a means to designing a framework that is academically more rigorous and that can be used to assess the basic filmmaking process (ibid.). The method the SCOR model uses to provide this begins with the way it dissects the management process into five ‘sub-processes’: planning, sourcing, manufacturing, delivery and evaluation of the entire process (Figure 5). These sub-processes are themselves made up of different tasks that all need to be completed in order for the supply chain to function. Though logic dictates that planning should come before sourcing, sourcing should come before manufacturing, and so on, a specific sequential order is not mandated in the SCOR model’s basic supply chain management process. Furthermore, the model can also accommodate the unique interactions between customers and suppliers, industry-specific evaluations and how-to best structure sub-processes, thus allowing for the construction of a fully customised SCM for the UK low-budget film sector (Figure 5).

Basic supply chain management process

(APICS 2009)

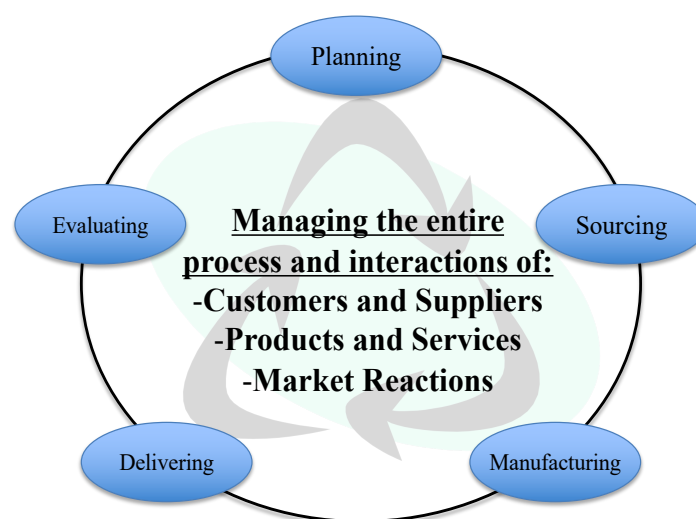


Figure 5 - Basic supply chain management process

2.2.2 The low-budget film supply chain model (overview)

The determination of a quantitative perspective and the need for an overall research framework that would not only serve as a coherent structure for presenting in one narrative all the findings, but could also be used to identify the data types that might be used, led to a reinterpretation of the filmmaking process using the SCOR's supply chain management process (Figures 4 & 5). The supply chain used in this study is based on this adaptation and is defined as an overarching process that has seven inter-dependent sub-processes: planning, sourcing, manufacturing, delivering, evaluating, project management and marketing (Figure 6).

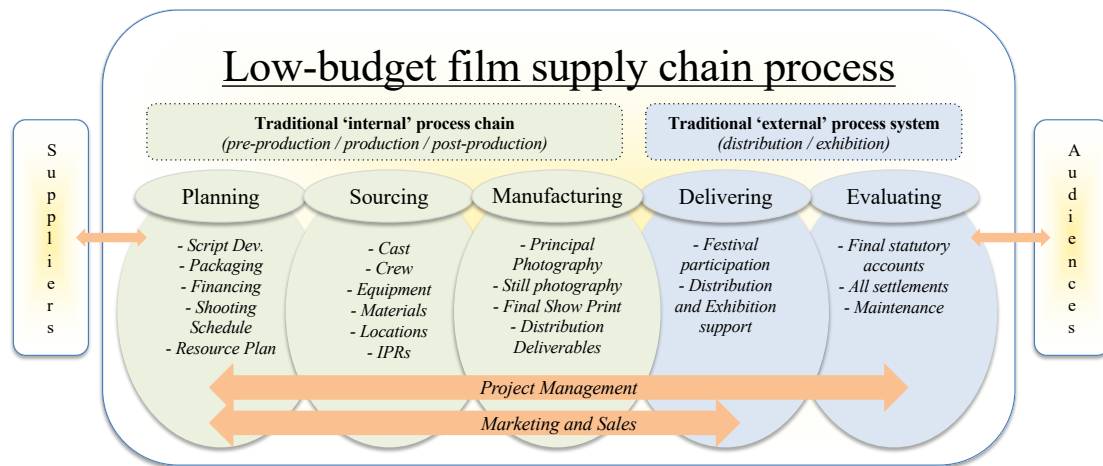


Figure 6 - Low-budget film supply chain process model

As in the SCOR model, the tasks that comprise these sub-processes do not need to be performed in any particular order—except when dependencies are involved—or need to be assigned to any one sub-process category. For example, script development can be categorised as both a planning and a sourcing decision/task in this model since it has a high interaction with project planning and the sourcing of an existing script. Therefore, the order of decisions/tasks and their dependencies are also not predetermined in this model, which allows it to accommodate the high level of complexity and risk that is inherent in the filmmaking process. While it must

be admitted that the model does not offer a means of measuring complexity or project risk, it does offer a way for producers to mitigate risk by identifying all the major decisions/tasks and their dependencies. The focus of the model is therefore on improving process efficiency, not customer preferences like the value chain model, thus allowing for *ars gratia artis* motives.

Before explaining how the low-budget film supply chain was used as a framework to present the research findings and why it was an appropriate framework to answer the questions posed in this study, it is first necessary to describe the main decisions/tasks that comprise each sub-process. The logical point to start this description is with the planning sub-process since it comprises all the decisions/tasks needed to package, schedule and resource a movie (Figure 6). These decisions/tasks can either supersede, precede or be done simultaneously to sourcing sub-process decisions/tasks like the hiring of personnel or acquisition of equipment, locations, IPRs and financing. Unlike the basic filmmaking process that uses simple terms like ‘development’ and ‘pre-production’ to label and predetermine the order of such sub-processes, the SCOR sub-process categories offer a more definitive way to view a deeper level of dependencies. These include prerequisites for specific skills, materials and time parameters. This is why financing appears in both the planning and sourcing sub-processes since it requires both organisational-planning and negotiation-sourcing skills; and also why script development can be viewed as a planning sub-process task in one project when describing it as a packaging tool, but in another project it could be categorised a sourcing task when describing the acquisition of a screenplay.

Once most of the planning and sourcing decisions/tasks have been completed the supply chain enters a manufacturing phase that can be defined in producer parlance as all the activities that are conducted in the production and post-production stages. This large and variable collection of decisions/tasks includes every physical image-and-sound task, from the start of principal

photography to the completion of all ‘distribution deliverables’ (Figure 6).⁷⁵ While many of these decisions/tasks are either intuitive enough not to need formal description, or too detailed to be discussed in a way useful to this study, it is worth noting the requirement for distribution deliverables. Although distribution deliverables are seldom mentioned in academic discourse, they are an important consideration for low-budget producers since they are required before a movie can be theatrically realised and can also be prohibitively expensive. It is also during the delivery sub-process that the producer will need to perform public relations tasks that involve the representing of the movie to the press and coordinating the participation at festivals. After the delivery sub-process has progressed to a sufficient point, the low-budget producer can begin to assess the performance of the script-to-screen process, commercially and artistically, and complete any remaining legal obligations to investors and regulatory agencies before restarting the supply chain process for a new production. These decisions/tasks can include the submission of final statutory accounts and reports to government agencies, such as Companies House; investor reports; the setting up of certain maintenance activities, so that IPRs are protected; and the sending out of any final legal and congratulatory correspondence (Figure 6).

There are two other sub-processes that need to be conducted in conjunction with the five sub-processes just described in order for a low-budget film supply chain process to be successfully completed. The supply chain must be managed throughout the entire process, so that all five sub-processes work harmoniously as a single process. Project management decisions/tasks can be numerous, complex and time-consuming, since they require the skill to balance time, budget and quality constraints while simultaneously managing personnel, crises and asset logistics (Figure 6). This sub-process is generally accompanied by marketing and sales decisions/tasks,

⁷⁵ The number of distribution deliverables can amount to hundreds of items, depending on the distributor’s requirements. For example, a show print on HDCam or digital file, a trailer, poster art, separate audio tracks, separate music tracks, licenses, listings of cast and crew restrictions, certificate of authorship, certificate of origin, chain of title, errors and omission insurance (E&O) and other items too numerous to list here.

which also require skills different from those needed in the creation of the film itself. This sub-process includes tasks in public relations, the design of promotional materials (posters, trailer, trade release), photo stills, festival applications and industry/press screenings. These distinct decisions/tasks are not, by nature, always dependent on or linked with activities in the other sub-processes. For example, it is possible for a producer to create a movie poster for a screening before most of the sourcing or any of the manufacturing tasks have been completed, but it is also possible that a producer might never need to create a poster if the film is sold directly to a broadcaster. As with all the possible sequences that are available in this version of the SCM, the order of decisions/tasks is totally dependent on the production.

2.2.3 The low-budget film supply chain model (applied)

The previous overview of the low-budget film supply chain process not only provides a useful understanding of how producers make their movies, but also offers a reference for how it will be used to systematically present the findings in Chapters Four to Seven and how those findings should be interpreted with a script-to-screen perspective. In fact, the framework was even used during the research design phase to identify the types of quantitative data that might be needed to answer the research questions and ensure a broad enough study was achieved that would advance film-management practice and accommodate the industry's peculiarities. To explain how the low-budget film SCM adapted for this thesis was used in these ways, it is helpful to illustrate how it was applied during the research conceptualisation phase to a hypothetical film, how it works in practice and to present the information that was gained from that exercise. This applied version of the model took the form of a summary listing of all the sub-processes, decisions/tasks, other dependencies and skills needed, using the SCOR activity categorisation

method (APICS 2009). This approach described these process elements as a single workflow of seven interlocked sub-processes that was hierarchically structured as:⁷⁶

Sub-process – (level 1)

Major decisions/tasks – (level 2)

Minor decisions/tasks/processes – (level 3)

The initial aim was to apply the SCOR activity categorisation method to the production of an actual low-budget film, but the selection of a suitable production was complicated by lack of access to confidential schedules and assistant director reports. It therefore became necessary to invent a hypothetical production modeled on the versions of the basic filmmaking process by practitioner-authors Figgis (2007), Grove (2004), Jones (2003), Ryan (2010), Simens (2003) and Vachon (2007). These versions, with few exceptions, had relatively similar sub-processes, decisions/tasks and dependencies (sequencing and skills) irrespective of the budget or number of crew involved. For instance, Jones detailed the crew sizes for films made for <£20k, £20k to £50k, £50k to £200k and >£200k using a scale that began with a crew of 12 for a <£20k film and ended with 55 for a >£200k film (2003: 94). One finding from this exercise indicated that similar supply chain sub-processes are always used, irrespective of crew size, an observation that suggests the number of process elements and level of complexity is not greatly affected by the number of personnel involved.⁷⁷ In fact, though evidence will be presented in Chapter Three that suggest certain tasks once provided by outside suppliers had moved ‘inhouse’ in ways that might be viewed as a simplification of the process, the results of this exercise confirmed that the low-budget supply chain remained a highly risky endeavour since the same decisions and tasks that underpin project complexity are required in every moviemaking project.

⁷⁶ The term ‘decision’ means a choice between alternative tasks that are intended to achieve the same desired result, a ‘task’ is as an activity with a measurable outcome and a ‘sub-process’ is a set of interdependent tasks that together lead to one measurable result (APICS 2009).

⁷⁷ For example, films made for ≤£1m did not need a decision as to whether to obtain a completion bond (Jones 2003: 153; Ryan 2010: 232).

The hypothetical film considered herein was therefore not determined on the basis of crew size, as is often the practice in Hollywood films, but instead on the usual decisions/tasks and other dependencies needed to make a commercial low-budget film as defined by practitioner-authors. Based on this survey, the hypothetical film used herein had a 16-week supply chain comprised of a five-week planning and sourcing sub-process, a three-week manufacturing sub-process (18 x 12-hour days, 3:1 shooting ratio, five pages a day, 90-page script 90/18, five locations), an eight-week delivering sub-process and photography based on digital technology (Table 5).

LOW-BUDGET FILM SUPPLY CHAIN – HYPOTHETICAL PRODUCTION	
<i>(Summary sheet)</i>	
<i>Based on a 16-week supply chain comprised of: five weeks for planning and sourcing, three weeks for manufacturing (18 days, 12-hour day, 3:1 shooting ratio, five pages a day of 90-page script, five locations, digital cameras) and eight weeks for delivering.</i>	
Sub-process category / major task or mini process / minor task (main skill required)	Decision/task Dependencies
# Decisions/tasks that can be measured quantitatively and some amount of data is publicly available.	* See skills descriptions below
1. PLANNING (Part of what has been traditionally known as pre-production)	
1.1. Packaging #	2.1 (1-6) *
1.1.1. Project profile selection (genre selection, talent led)	6.2 (5) *
1.1.2. Top sheet	1.1.3 (1-6) *
1.1.3. Business plan (all provisional) #	2.1 (1-6) *
1.1.3.1. Talent plan	
1.1.3.2. Top-down budget #	
1.1.3.3. Marketing and sales plan	
1.1.3.4. Sales estimates by territory #	
1.1.3.5. Management structure (chain of command)	
1.1.3.6. Legal structure statement #	
1.1.3.7. Compliance plans (WGGB, BECTU, PACT, health and safety) #	
1.1.3.8. Finance structure plan (presales, gap financing, actor-partner, co-production, private equity, SEIS, EIS and public sector) #	
1.2. Final shooting schedule and production board (Based on 18 shooting days, 12 hours a day, shooting five pages a day, 3:1 shooting ratio and cast scheduling) #	2.1 (1) *
1.3. Final budget plan (based on final script and shooting schedule) #	2.1 (1-6) *
2. SOURCING (Part of what has been traditionally known as pre-production)	
2.1. Screenplay sourcing #	NR (2, 3, 10, 17) *
2.1.1. Screenplay search	
2.1.2. Option a completed script #	
2.1.3. Hire a writer (if developed in-house) #	
2.1.4. First draft (if developed in-house)	
2.1.5. Rewrites (if developed in-house)	
2.1.6. Performed readings	
2.1.7. Storyboards	
2.1.8. Coverage reports	
2.1.9. Final draft (90-pages Warner Brothers format)	
2.1.10. Shooting script	
2.1.11. Copyright script, WGA registration, historical chronicle #	
2.2. Casting: principal cast hired #	2.1, 2.7 (2, 3, 8, 10) *
2.2.1. Talent agent discussions	
2.2.2. Principal cast selected	
2.2.3. Legally non-binding 'letters of understanding' signed by principal cast	
2.2.4. Principal cast employment contracts signed	
2.3. Casting: non-principal cast hired	2.1, 2.7 (2, 3, 8, 10) *
2.3.1. Casting call advertising	
2.3.2. Non-principal cast selected	
2.3.3. Extras selected	
2.3.4. Non-principal cast employment contracts signed	
2.4. Crewing: department heads hired #	2.1, 2.7 (2, 3, 10) *
2.4.1. Director selected	
2.4.2. Director of photography selected	
2.4.3. Sound recordist selected	
2.4.4. Gaffer (chief electrician)	
2.4.5. Costume designer selected	
2.4.6. Production designer selected	

LOW-BUDGET FILM SUPPLY CHAIN – HYPOTHETICAL PRODUCTION

(Summary sheet)

Based on a 16-week supply chain comprised of: five weeks for planning and sourcing, three weeks for manufacturing (18 days, 12-hour day, 3:1 shooting ratio, five pages a day of 90-page script, five locations, digital cameras) and eight weeks for delivering.

Sub-process category / major task or mini process / minor task (main skill required) # Decisions/tasks that can be measured quantitatively and some amount of data is publicly available.	Decision/task Dependencies * See skills descriptions below
<ul style="list-style-type: none"> 2.4.7. Editor selected 2.4.8. Music composer selected 2.4.9. Unit publicist / EPK producer selected 2.4.10. Department heads employment contracts signed 2.5. Crewing: key personnel and department teams hired # 2.5.1. Assistant director (1stAD) selected 2.5.2. Camera team selected (assistant cameraman, camera operator, focus puller and clapper) 2.5.3. Sound recordist team selected (sound assistant and production sound mixer) 2.5.4. Gaffer and lighting team selected (the best boy – gaffer assistant - grip and sparks) 2.5.5. Costume designer team selected (make up / hair artist) 2.5.6. Production designer team selected (asst. production designer, prop master, buyer, maker and painter) 2.5.7. Post-production team selected (including post-production manager/supervisor, sound editor, sound designer, dubbing mixer, foley artist, SFX artist and negative cutter) 2.5.8. Musicians selected 2.5.9. Music supervisor selected 2.5.10. Stills photographer selected 2.5.11. Special effects coordinator (practical and digital) selected 2.5.12. Continuity and script supervisor selected 2.5.13. Stunt coordinator and performers selected 2.5.14. Line producer selected 2.5.15. Production manager selected 2.5.16. Production assistant/secretary selected 2.5.17. Production accountant selected 2.5.18. Drivers and runners selected 2.5.19. Caterer selected 2.5.20. Location manager selected 2.5.21. Storyboard artist selected 2.5.22. Casting director selected 2.5.23. Health and safety / first aid officer selected 2.5.24. Key personnel and department teams employment contracts signed 2.6. Sales agent agreement obtained 2.7. Financing obtained # 2.7.1. Preparation of UK financing structure documents (presales, gap financing, actor-partner, co-production, private equity, SEIS and EIS) # 2.7.2. Public sector funding applications (national/regional screen agencies, BFI and MEDIA) # 2.7.3. Crowd funding prospectus material and upload (if applicable) # 2.7.4. Investment proposal road show and related sales activities (SEIS and EIS) # 2.7.5. Financing structure contracts finalised 2.8. Equipment purchase or hire # 2.8.1. Camera package with lenses # 2.8.2. Cranes and dolly 2.8.3. Steadicam 2.8.4. Lights (key, back and fill) 2.8.5. Blue/green screens 2.8.6. Construction tools 2.8.7. Production equipment (computer, software) # 2.8.8. Administration equipment (phone, computer, accounting and office software, scheduling and production management software) # 2.9. Materials purchased and inventoried 2.9.1. Image capture storage 2.9.2. Expendables (gels, filters and tape) 2.9.3. Set construction materials 2.9.4. Set dressings (furniture, draperies, paintings, plants) 2.9.5. Costumes 2.9.6. Props rentals (cell phones, lighters, guns) 2.9.7. Production office materials (stationery) 2.10. Insurance purchased # 2.10.1. Mechanical equipment insurance 2.10.2. Theft and damage insurance 2.10.3. Liability insurance 2.10.4. Workers compensation insurance 2.10.5. E&O insurance # 2.10.6. Completion bond # 2.11. Locations secured # 2.11.1. Location scouting (recce) 2.11.2. Locations selected # 2.11.3. Permits, permissions and releases 2.11.4. Production office selected and leased 2.12. Purchase or option of any copyright materials (music) # 	<ul style="list-style-type: none"> 2.1, 2.7 (2, 3, 10) * 2.1 (1, 2, 3) * 1.1, 2.1 (1-5) * 1.1, 2.7 (2, 3) * 1.1, 2.7 (2, 3) * 1.1 (2, 3, 7) * 1.1 (1-6) *

LOW-BUDGET FILM SUPPLY CHAIN – HYPOTHETICAL PRODUCTION

(Summary sheet)

Based on a 16-week supply chain comprised of: five weeks for planning and sourcing, three weeks for manufacturing (18 days, 12-hour day, 3:1 shooting ratio, five pages a day of 90-page script, five locations, digital cameras) and eight weeks for delivering.

Sub-process category / major task or mini process / minor task (main skill required) # Decisions/tasks that can be measured quantitatively and some amount of data is publicly available.	Decision/task Dependencies * See skills descriptions below
3. MANUFACTURING (Traditionally known as production and post-production)	
<ul style="list-style-type: none"> 3.1. Set building 3.2. Principal Photography # <ul style="list-style-type: none"> 3.2.1. Blocking and other set preparation 3.2.2. Set up lighting 3.2.3. Set up sound 3.2.4. Filming (masters, close ups and coverage shots) 3.2.5. Continuity monitoring 3.2.6. Review of dailies (including lab transfers if 16mm or 35mm) 3.3. Photo stills # 3.4. Film edit <ul style="list-style-type: none"> 3.4.1. First rough editing 3.4.2. Sound edit 3.4.3. ADR 3.4.4. Foley 3.4.5. Music mix 3.4.6. Dubbing mix 3.4.7. Separate M&E track, titles 3.4.8. Optical transfers, 3.4.9. Negative cutting (digital online) 3.4.10. Colour correcting 3.4.11. Striking print 3.5. Pickups and reshoots 3.6. Soundtrack 3.7. Test screenings 3.8. Final answer print 3.9. Digital to 35mm blow up transfer (if necessary) # 3.10. Distribution deliverables # <ul style="list-style-type: none"> 3.10.1. Release print 3.10.2. 35mm inter-positive and inter-negative 3.10.3. 35mm optical sound negative 3.10.4. Sound master, music and effects mix (M&E) 3.10.5. Textless title background 3.10.6. Trailer (Digital and 35mm) 3.10.7. Video tape 3.10.8. Video tape textless backgrounds 3.10.9. Universal master 3.10.10. Screenplay transcript 3.10.11. EPK, wrap report and reviews # 3.10.12. Photo stills package 3.10.13. Credit list (separate) 3.10.14. Script breakdown sheet 3.10.15. Music cue sheet 3.10.16. Distribution restrictions 3.10.17. US copyright notice 3.10.18. Chain of title documentation 3.10.19. Certificate of origin and of authorship 3.10.20. Certificate of nationality 3.10.21. E&O policy confirmation 3.10.22. Lab access agreement letter (if 16mm or 35mm) 	<p>2.7 (2, 3, 12, 13) *</p> <p>2.7 (3, 11, 14, 16, 20, 21) *</p> <p>NR (3, 15) *</p> <p>3.2 (3, 18, 20) *</p> <p>3.2 (3, 11, 20) *</p> <p>3.2 (18, 20) *</p> <p>3.2 (3) *</p> <p>3.2 (18, 20) *</p> <p>3.2 (3, 20) *</p> <p>3.2 (3, 20) *</p>
4. DELIVERING (Part of what has been traditionally known as distribution and exhibition)	
<ul style="list-style-type: none"> 4.1. Distribution and exhibition support (by territory) # <ul style="list-style-type: none"> 4.1.1. Theatrical certification secured with BBFC 4.1.2. Poster creative input and/or production 4.1.3. Principal cast and crew exhibition support 4.1.4. Lab negative storage (if 16mm or 35mm) 4.1.5. Digital image storage 4.2. Self-distribution activities (contingent on 4.1) # <ul style="list-style-type: none"> 4.2.1. Limited theatrical release tasks (four-walled, university screenings) 4.2.2. Terrestrial broadcast agreements (pay and free TV) 4.2.3. DVD, VOD and online release activities 4.3. Ancillary rights exploitation activities (if relevant) # 	<p>3.8, 3.9 (3, 6) *</p> <p>3.8 (3, 5, 6) *</p> <p>3.8 (2, 3, 4, 5) *</p>
5. EVALUATING	
<ul style="list-style-type: none"> 5.1. Final assessment reports # <ul style="list-style-type: none"> 5.1.1. Distribution sales performance # 5.1.2. Box office performance # 5.1.3. Ancillary rights sales (DVD and downloads) # 5.1.4. Critic review (Rotten Tomatoes) # 5.1.5. Private investor and public-sector assessment reports 5.1.6. Audience reach # 5.1.7. Festival performance # 	<p>1.1, 1.2, 1.3 (1-5) *</p>

LOW-BUDGET FILM SUPPLY CHAIN – HYPOTHETICAL PRODUCTION	
<i>(Summary sheet)</i>	
<i>Based on a 16-week supply chain comprised of: five weeks for planning and sourcing, three weeks for manufacturing (18 days, 12-hour day, 3:1 shooting ratio, five pages a day of 90-page script, five locations, digital cameras) and eight weeks for delivering.</i>	
Sub-process category / major task or mini process / minor task (main skill required)	Decision/task Dependencies
# Decisions/tasks that can be measured quantitatively and some amount of data is publicly available.	* See skills descriptions below
6. PROJECT MANAGEMENT (Usually done throughout the entire process)	
6.1. Company name selected	1.1 (1) *
6.2. Company registration with Companies House #	NR (3) *
6.3. Statutory obligations management #	NR (3, 4, 6) *
6.3.1. Annual financial accounts #	
6.3.2. VAT and PAYE	
6.4. Contract compliance management	1.1 (3, 6) *
6.4.1. Employment contracts	
6.4.2. Credit list maintenance	
6.4.3. Releases: (actor's, property, music, group, script)	
6.5. Production schedule management #	1.2, 1.3, 2.1 (3, 4, 6, 8) *
6.5.1. Daily production checklists (production manager's checklist, assistant director's shot list, DP and gaffer checklists and property and wardrobe checklists)	
6.5.2. Daily production reports (camera reports, sound reports, script supervisor notes and edit notes)	
6.5.3. Expense-to-budget report (daily and weekly) #	
6.5.4. Call sheets produced and distributed (daily)	
6.5.5. Team communication activities (daily meetings)	
6.5.6. Review of dailies meeting (daily)	
6.5.7. Review actual to plan budget and schedule meeting (daily)	
6.5.8. Health and safety plan management (risk assessments)	
6.5.9. Accommodation and transportation logistics for key cast and crew	
6.5.10. Craft management	
6.5.11. Security management	
6.5.12. Health and Safety management	1.1 (3, 6) *
6.6. Post-production schedule management	
6.6.1. Edit schedule management	1.1 (3, 6) *
6.6.2. Routine updating of post-production reports (schedule, music cue sheets)	
6.7. Distribution and exhibition management	1.1 (3, 6) *
6.7.1. Distribution deliverables management	
6.7.2. Print transfer management	
6.8. Investor communications and management	1.1 (3, 5, 6) *
6.8.1. Routine investor updates	
6.8.2. Routine investor compliance reports	
6.8.3. Remittance of all investor profits (if applicable)	
6.9. IPRs management (registration of copyright of screenplay) #	1.1 (3, 6) *
7. MARKETING AND SALES (Usually done after all other sub-processes)	
7.1. Public relations activities #	3.3 (3, 5, 6) *
7.1.1. Listed in the trades (production listings)	
7.1.2. Listed in IMDb, British Council website and film finders	
7.1.3. Webpage	
7.1.4. Online EPK, stills, poster, trailer and news press releases #	
7.1.5. Press engagement and management (interviews)	
7.2. Festival applications #	3.1 (3, 5, 6) *
7.3. Festival screenings logistics	3.1 (3, 5, 6) *
7.4. Sales agent and distributor contact campaign	3.1 (3, 5) *
7.4.1. Sales agent cold calling	
7.4.2. Private screenings	
7.5. Sale agreement(s) signed #	3.1 (2, 3, 4, 5) *
7.6. Sales agent support activities (film market sales support)	3.1 (5) *
# Decisions/tasks that can be measured quantitatively and some level of data is available from secondary sources.	
* Main skills key: 1 Planning, 2 Organising/sourcing, 3 Managing/controlling/legal, 4 Finance skills, 5 Marketing/sales, 6 Admin support, 7 Location support, 8 Casting skills, 9 Conceptual artists, 10 Director skills, 11 Camera/lighting skills, 12 Set designer skills, 13 Gaffer/spark, 14 Make-up/costume, 15 Stills photo, 16 Sound recordist, 17 Scriptwriter, 18 Editor, 19 Caterer, 20 Other specific production/post skills (20+), 21 Acting skills. Adapted from both APICS 2007, Jones 2003)	

Table 5 - Low-budget film supply chain hypothetical production

Admittedly, this hypothetical example presents a challenging schedule. Its 3:1 shooting ratio, 12-hour days and five-pages-a-day plan represent an ambitious project that is likely to have been easier for practitioner-authors to portray in their texts than it was to put into practice

during the digital revolution.⁷⁸ This example, however, also presents an opportunity to study the filmmaking process for what it is to the producer—a difficult and risky undertaking. Since this example was not based on a real movie, it is also possible that some critical decisions/tasks, dependencies and/or resources might have been overlooked that ought to have been considered for the data collection. For these reasons this hypothetical film cannot be considered a perfect representation of the sector’s supply chain. However, no two films have been made in the same way or with the same mix of resources—a history that suggests it is improbable that a single example could ever represent every film made by the sector. This hypothetical movie therefore offers a comprehensive view of the supply chain process that attempts to represent the majority of elements required in low-budget filmmaking, and for this reason was deemed an acceptable tool to use for the research design in this thesis (Table 5).

The categorisation of all the elements in this hypothetical example resulted in the identification of 225 major and minor decisions/tasks, 56 major dependencies (sequence and personnel) and at least 41 different types of skill requirements (Table 5).⁷⁹ This statistical summary clearly differs from the far simpler descriptions of the basic filmmaking process given by practitioner-authors in that it offers a more detailed view of the dependencies, complexities and risks inherent in the supply chain process. Nevertheless, since these elements represent the most common filmmaking elements published by practitioner-authors, it is reasonable to conclude that they reflect the most common management challenges experienced by low-budget producers. There was, however, one obvious difference between the way the basic filmmaking process was portrayed by the practitioner-authors and this hypothetical project. This difference was in the way process complexity was presented by the practitioner-authors, who explicitly

⁷⁸ In *Recommended Rates Terms and Conditions* published by BECTU it stated that 11 hours per day was acceptable (2010).

⁷⁹ These findings are still consistent with those derived from the separate works of Simens and Jones noted in Chapter One since those estimates were based on ‘all’ possible decisions/tasks, skills and resources, not just the major and minor decisions/tasks, skills and materials.

mentioned only 12 task sequence dependencies; but after their main decisions/tasks were categorised, 45 sequence dependencies were identified (Figure 7; Table 5). This would suggest that not only is the basic low-budget filmmaking process much more complex than has been stated in ‘how-to-make-a-film’ books, but also, as we saw before with the observation on crew member numbers, the level of complexity is unlikely to be affected by changes in most external factors. In particular, the level of complexity is unlikely to be affected by new technology, given the one-off nature of production, the continual requirement for the same elements in the supply chain and the continuance of certain product requirements for feature-film distribution.

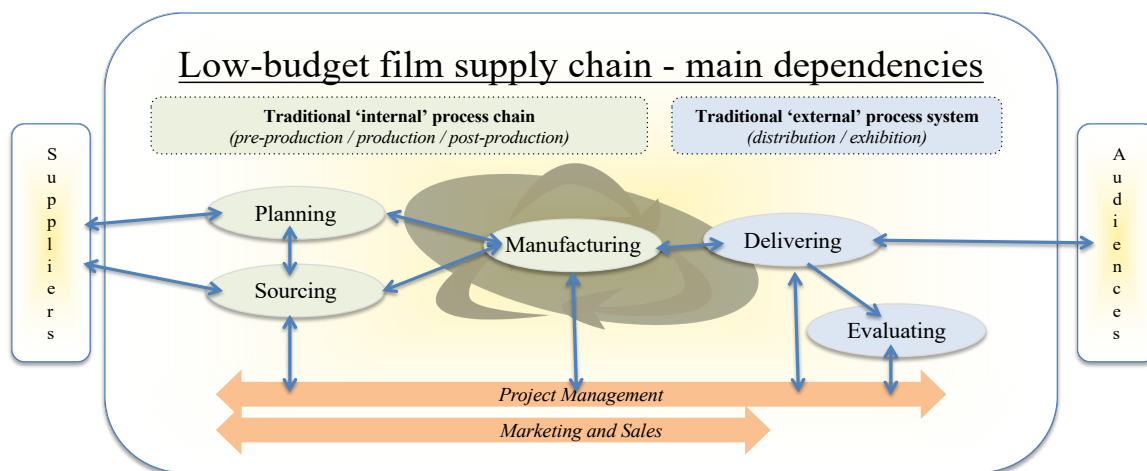


Figure 7 - Main dependencies explicitly mentioned by practitioner-authors

More attention is given to these findings in Chapter Eight, but it is appropriate to re-emphasise here that this applied hypothetical exercise was needed to: (1) identify the decisions and tasks that were most pertinent to answering the research questions and that might be quantitatively measured using secondary data sources; (2) test if a broad enough study could be conducted that would include quantitative analysis of all five main sub-processes and that might provide meaningful insight on how the script-to-screen process evolved during the digital revolution; (3) confirm if enough quantitative data might be available that could be used to identify changes

in the level of project risk and approaches used in film-management practice; and, (4) confirm the framework could be used as the overall research structure. Thus, the exercise confirmed all of these possibilities since it resulted in the identification of 27 major decisions/tasks that had the potential to be quantitatively measured in ways that could be useful in answering the research questions and still aligned with the aim of this thesis (Latham 2016: 47). These 27 decisions/tasks (of the 225), highlighted in yellow in the summary sheet and later used as a checklist during the sources audit discussed later in this chapter, also confirmed data might be available to provide the economic and cultural contribution analysis also needed—an aspect of the data collection process that will also be discussed later in this chapter (Table 5).

2.3 Other interpretative considerations

The adoption of a quantitative perspective and an overall research structure based on the low-budget film supply chain process was not, however, enough to narrow down the research focus to a level needed to establish a viable research project. Two other perspectives were also used in the research design to ensure that a more manageable project would be undertaken, and that the overall methodology was aligned with the research aim. Although Easterby-Smith et al. (2008) would not define them as such, these perspectives provided the additional clarification needed to determine the research method and approaches described later in this chapter. These are the British low-budget movie producer's viewpoint, used throughout this study, and the hypothesis that changes in the low-budget supply chain can be primarily attributed to the arrival of digital technology instead of to developments in other environmental factors.

2.3.1 The low-budget producer's viewpoint

Arguably the most important person in the script-to-screen process, at least in terms of the level of responsibility held and the type of decisions that are made, is the producer. It is the producer

who is ultimately responsible for every decision made during the supply chain process, and it is the producer who is alone responsible for ensuring that the film is finished on schedule, stays within budget, is of a sufficient quality to be commercially distributed and is seen by as large a paying audience that is possible (Simens 2003: 29). It is therefore reasonable to interpret any SCM-based analysis from the producer's perspective since it is the best way to isolate and interpret data related to how change occurred, what environmental factors were involved and what observations can be made that advance film-management scholarship. For this reason, the focus on the low-budget producers' viewpoint in this study makes an important contribution to the research by providing an essential film-management dynamic to interpreting the results.

As the hypothetical example presented in the last section illustrates, the responsibilities of the producer can begin before a director or an investor is involved and end long after they have left the project, and so ubiquitous that they are present in every level of every sub-process (Table 5). The decisions that producers have to make, in effect, are those with the greatest influence and this also is why the producer's viewpoint is a valid way to assessing changes that occurred in the supply chain and interpreting much of the data presented later in this study. While in some sections of this thesis others' views are considered, the producer's viewpoint is the most frequently used because the quantitative data measured herein are based on the decisions made by producers and it is the one best aligned with the aim and questions (Latham 2016: 47).

In noting the role and responsibilities of the producer and why the producer's perspective has been used in this study, it is also appropriate to mention briefly that the business skills needed to make all the major decisions and find a way to balance the often-conflicting project factors of limited time, the need to reduce costs and the need to make a quality movie are considerable (Slack et al. 2006: 402). The producer must not only possess or have access to a broad range

of business skills seldom found in a single person, but also have a pragmatic acumen that takes into account how a decision in one sub-process might affect other decisions/tasks in other parts of the supply chain (Simens 2003: 29). These skills are essential for good film-management to be achieved and, as such, illustrate why the role of the low-budget producer equates to senior executives in other industries, and why the producer's perspective offers the most appropriate interpretative for the economic contribution-based research questions (Mackay 1992: 56–63).

2.3.2 The growth-from-innovation hypothesis

The design of this research thesis was also based on the hypothesis that digital technology was the main external factor instigating change and shaping the supply-chain structure of the low-budget sector from 2000 to 2012 and, consequently, influencing its manufacturing output. The origins of this hypothesis and the reasons for accepting it as the central premise for conducting the first major academic research study on the sector have already been outlined and will be examined with more correlational evidence in Chapter Four, but it is first necessary to explain why all the other environmental factors usually included in operational performance analysis have either been ignored or only briefly acknowledged in this study.

The research contained in this study is mostly focused on the low-budget sector's supply chain process and is mostly an 'internal environment' economic study of process changes and output; however, such changes in operational performance are usually influenced by macroeconomic forces that originate from the 'external environment' outside the direct control of executives (APICS 2009; Johnson et al. 2013: 53; Slack et al. 2006: 402). This assertion is corroborated by Drucker, who explains that strategic decisions and the resulting actions of firms, industry sectors and entire industries need to be based on a factual knowledge of all the factors in the internal and external environments (2007: 36). This advice is logical since the operation of the

global movie industry has on many occasions in its history been affected by external forces emanating from changes in the economy, laws, demographics, environment, technology, society and public safety (Puttnam 1997). In strategy development these external forces are often assessed using ‘environmental scanning analysis’ methods and, even though the SCOR model does have a ‘market interactions’ component that can be used to assess the influence of such factors on the supply chain (APICS 2009), this part of the SCOR model was not incorporated into the supply chain framework used herein for reasons that will soon become apparent—despite the fact that this type of analysis is considered by some management theorists as an essential aspect to management performance evaluation (Drucker 2007: 36).

Two established environmental scanning models that can be used to conduct this type of macro-environment analysis are the SWOT and PESTEL models (Johnson et al. 2013: 53). Often attributed to Albert Humphrey, the SWOT model provides a means of assessing a firm’s or industry’s internal strengths and weaknesses (supply chain elements within its control) and the external market opportunities and threats that exist (2005: 7). The PESTEL model is credited to Francis Aguilar and is used to assess external environment forces, particularly the political, economic, social, technological, environmental and legal macroeconomic factors that impact an organisation or industry (Aguilar 1967). These models provide different perspectives of the market for different reasons. The SWOT model was designed to help executives formulate strategic options with the information of their relative position in the market compared to competitors or to industry norms (Johnson et al. 2013: 53). In contrast, the PESTEL model does not consider such organisational attributes or competitors, but instead provides a structure for measuring the political, economic, social, technological, environmental and legal factors in the external environment that might impede the attainment of a firm’s aims (ibid.; Figure 8).

PESTEL and SWOT model comparison

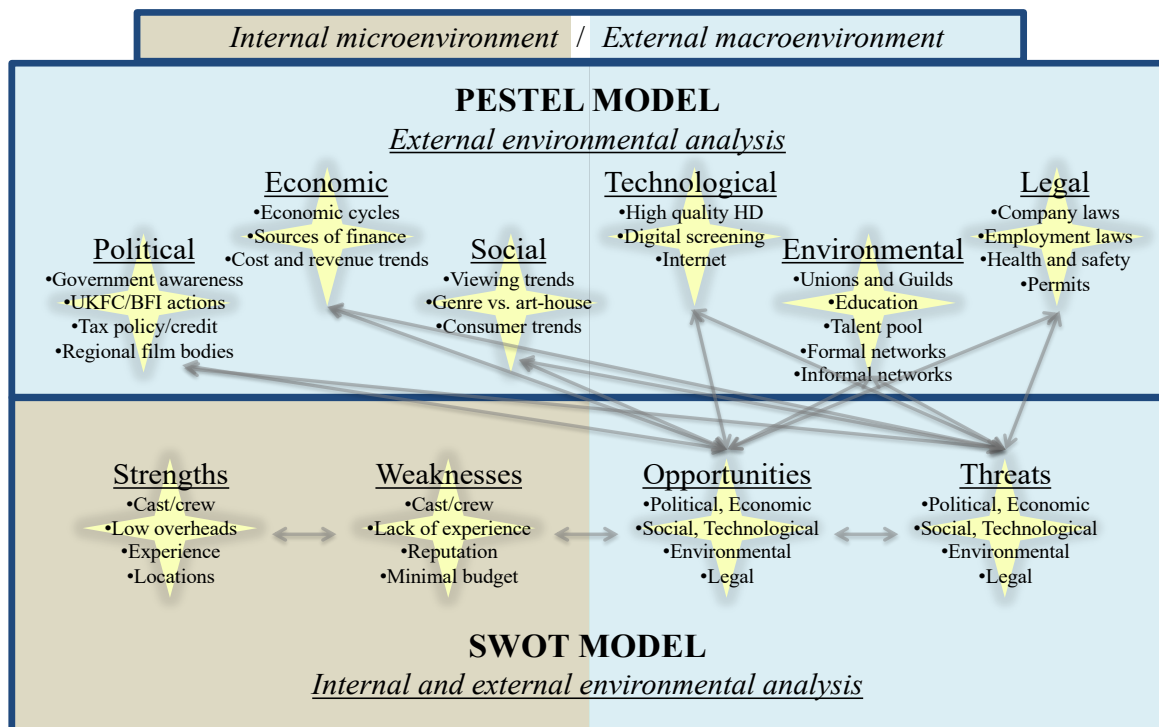


Figure 8 - PESTEL and SWOT model comparison

These differences, and the ways in which the models might help achieve the aim of this thesis, were reviewed during the research design phase. It was determined at that time that a modified SWOT model would be appropriate in helping to summarise the findings of this thesis. The PESTEL model was rejected as not being necessary since, in a preliminary PESTEL survey undertaken during the early stages of this study, technology was the only external factor that was found to have experienced a high level of measurable change (Table 6). Later in the conceptualisation process this decision was amended to include a number of legal, economic and social factors, but the decision to conduct the study on the premise that technology was the main environmental factor that had influenced the sector was not changed. In support of this decision, the small number of minor factors found to be worth noting after the preliminary study will be briefly noted in this section to illustrate why the hypothesis that digital technology was the main catalyst for change in the sector during the digital revolution is largely justified.

PESTEL SURVEY FINDINGS						
<i>(In terms of their possible impact on the low-budget sector)</i>						
Research conducted	Political change	Economic change	Social change	Technological change	Environmental change	Legal changes
Evidence found in literature review	NONE	MINOR	MINOR	HIGH	MINOR	MINOR
Evidence found in source review	NONE	NONE	NONE	HIGH	NONE	NONE
NB: None = no other evidence found, Minor = less than five pieces of evidence found, Medium = five to ten pieces of evidence found, High = over ten pieces of evidence found.						

Table 6 - PESTEL survey findings

Apart from the introduction of digital technologies, the most obvious environmental PESTEL factors that changed during the period under investigation—factors that undoubtedly had an impact on the domestic industry—were the introduction of new tax incentives for producers, the economic turmoil caused by a banking crisis and organisational changes in certain public-sector agencies. The UKFC/BFI (2008: 5), Oxford Economics (2012: 16), the EAO (2013: 31) and Harbottle and Lewis (2013: 24) have all commented on the impact these environmental factors had on the British movie industry; however, it should be noted that no evidence could be found these factors had any major impact—relative to the changes caused by new technology—on the low-budget sector’s supply chain or its contribution to the industry. In particular, the replacement of ‘Sale and Leaseback’ tax incentives for production with the UK Film Tax Relief (FTR) for producers in 2007 did not appear to have an effect on the sourcing of finance trends noted in Chapter Five; the banking crisis of 2008 and the recession that followed did not appear to have an effect on the production trends presented in Chapter Three; and public-sector changes that altered direct investment programmes, such as the abolishment of Scottish Screen in 2010 and the UKFC in 2011, did not seem to have any measurable impact on the output trends also presented in Chapter Three. There were social factors related to changes in consumer behaviour that are likely to have had an impact, but in the absence of evidence to the contrary, it is likely these factors can also be attributed to technological change.

One social factor that might illustrate this possibility was the behavioural shift that occurred as digital technology gave British consumers new viewing capabilities and entertainment options (Grossman 2016: 14). Some of the most adverse of these behavioural changes, particularly a rise in movie piracy, online gaming and viewing a greater amount of non-movie content at the expense of cinemagoing, are not the subject of this study. However, what is relevant is that the application of digital technology also changed consumer behaviour in ways that created a more favourable environment for the sector. One such case relates to the arrival of multiple viewing capabilities in the mid 2000s and to the way that the option to watch any movie, at any time and at any place led to consumers watching more movies, but in ways that did not involve a television or a cinema (BFI 2012: 120). Among the digital technologies and devices that helped encourage this change in consumer behaviour were online media platforms that created self-distribution channels with little or no up-front investment. These channels, such as YouTube, Vimeo, Distriby and others noted in Chapter Four, offered alternatives to established exhibition methods at ‘no financial cost to the rights-holder’ (SP 2008: Issue 3435). The effect these channels had on the low-budget sector is measured in Chapter Six, but it is helpful to note here consumers started to watch films using platforms that were more readily available and that allowed these producers to gain access to a global audience via a method that circumvented the studio-dominated distribution system (Chapter Four and Chapter Six).⁸⁰

The behaviour of consumers changed not only in terms of how films were enjoyed, but also in the ways that they were discussed and that their reputations were established. Before the digital revolution, public debate about a film’s merits occurred mostly via word of mouth and after the pronouncements of critics and marketing hype. However, after the arrival of social media

⁸⁰ The concept, implications and opportunities of multiple viewing opportunities were widely discussed in the early 2000s. Organisations such as Shooting People, the Screen Academy in Scotland and Raindance all held self-distribution seminars based on this social change.

sites, Internet Movie Database (IMDb) and Rotten Tomatoes, consumers had another public platform—one that was more instantaneous in its reach to a global audience—on which to discuss movies in ways that could pre-empt the views of critics and the desired aim of marketing campaigns. These globally promoted websites and their impact on the supply chain will also be discussed in Chapter Four, but from a social PESTEL perspective, they offered consumers a variety of experiences, as well as services with which to instantly publish and distribute their views on any production.⁸¹ By 2005, consumer use of such sites, as well as the habit of discussing films on social media, had risen to the point that the public had gained a considerable amount of influence in defining the early reputation of a feature-film at the expense of the once dominant critics and advertisers (Campbell 2008: 30). This new influence extended to the ability to disseminate an opinion on any movie—not just those supported by a studio—and, along with a rapid rise in the use of social media, this trend began to be viewed by low-budget producers as another positive development. This is because social media sites were discussed as another way for films to be promoted with little or no cost (Michaelian 2014). Though this thesis does not provide any evidence that this view was a reality, the possibility that a film could be screened privately or at a festival, then reviewed and rated by the public in a way that might help producers promote their productions at virtually no cost, probably helped create a more favourable environment for low-budget film production (Grove 2013: 255).

In addition to the apparent lack of change in external environmental factors not related to new technology, the decision to forgo an in-depth PESTEL survey was also influenced by Vogel's assertion that technological advancements in the 'filmmaking process itself, in marketing and audience sampling methods, and in the development of distribution and data storage ... [have

⁸¹ Although IMDb concentrated on film data and Rotten Tomatoes focused on film reviews, these sites would offer enticing ways to express opinions including free-form message boards, user reviews, numerical ranking scales and emoji ratings.

been] ... unquestionably the most potent impetus for change' affecting the film industry (2007: 68–71). In fact, Vogel argues that technology-based innovation has always had a 'phenomenal' impact on the supply chain in ways that have exceeded all other PESTEL factors and this view is particularly relevant to the low-budget sector since his other three 'evolutionary elements' showed little change in the PESTEL survey. Specifically, in order of importance: access to capital; the effects of legislation on exhibition; and the merger actions of media conglomerates (2007: 68–74). While legislation has already been discounted as a relevant factor and corporate mergers pertain more to the high-budget sector, the lack of capital investment has always been mentioned as an issue affecting independent production in the UK and the establishment of a more sustainable domestic film industry (Parker 2002: 8; Petrie 1992: 52). For this reason, this thesis does consider investment trends in Chapter Five; however, as will be shown at that point, even these findings are likely to have been the result of technological innovations in online fundraising and not in any dramatic shift in use of traditional sources of capital.

As well as the findings in the PESTEL survey, Vogel's views, the optimism of practitioner-authors noted earlier and the technological changes that are chronicled in more detail in Chapter Four, there was also another evidence-based rationale for adopting a growth-from-innovation hypothesis as the main explanation for the trends observed in this thesis: Moore's Law. Named after Gordon E. Moore, co-founder of the firm Intel, Moore's Law is the observation that, over the history of electronics, the number of transistors in a dense integrated circuit chip doubles approximately every two years (Moore 1965).⁸² This groundbreaking prediction focused on the minimum cost of the density of transistors, but since then it has often been used to signify the basic idea that rapid, simultaneous improvements in both technical quality and lower costs can

⁸² From the 1940s to the 1970s computer technology underwent its own transition from analogue to digital formats (Ceruzzi 2003: 13).

be gained in manufacturing. Consequently, different Moore-inspired views have emerged in economic formulations that have assessed the supply chains of other industries. One example is Kryder's Law, which is used to measure data storage and network capacity, an aspect of the supply chain that will be discussed in Chapter Four (Walter 2005). Though these interpretations of Moore's work no longer focus on the production of transistors, or mandate a specific pace of innovation, they all espouse the idea that the velocity of innovation, in performance and quality, and the impact that innovation has on costs, remain intrinsically linked to production efficiency and, ultimately, to changes in consumer behaviour of the nature noted previously.⁸³ While Moore's Law cannot be used to prove that any efficiency changes found in this thesis were caused by the increased use of digital technology (causality), it does offer a historically-proven correlation between the market entry of new technologies and the attainment of greater efficiencies (Myhrvold 2012).⁸⁴ The findings presented in Chapters Three and Four detail correlations of this kind and, thus, support the growth-from-innovation hypothesis. This evidence does not negate the possibility that this thesis might have overlooked certain causal factors that influenced the production of a specific movie, but it does support the hypothesis—and ultimate position of this study—that technological factors in the external environment were the main reason for changes in the supply chain and a growth-from-innovation hypothesis is an appropriate interpretative perspective to use to assess any findings.

⁸³ The scope of this study did not permit a broader exploration of other ways Moore's Law and technological innovation can be interpreted. For example, from a social history of technology perspective, Pinch and Bijker argue that technological innovation is neither a linear nor simple process in the manner Moore's Law suggests but is instead 'multidimensional' in both its development and impact on society—an argument that will be noted again in Chapter Four when image-capture technology trends are discussed (1989: 29). The work of Bordwell et al. is also noteworthy since it concluded the development of Mooresque innovations can historically be attributed to big institutions in the movie industry (1985: 251). However, in regard to the low-budget sector during the digital revolution, this finding can be challenged since many different tool manufacturers were involved in the transformation of the low-budget supply chain, a finding that can be explained by Thompson's view that large firms had a role in enforcing technological standards on the innovations made by smaller firms (1985: 263).

⁸⁴ It is accepted that spurious correlations can be made simply because two trends are each increasing or decreasing, but the nature of the correlational evidence presented in this study, and in the absence of other findings, indicates technological factors were the main causes for the changes observed. Furthermore, the hypothesis growth-from-innovation hypothesis is also supported by a large amount of literature that has investigated the impact digital technology had on business workflows. For instance, Westerman et al. views Mooresque trends as evidence that digital technology remains the most potent environmental factor for 'reinventing business models' and that the transformation of a workflows is predicated on technological innovation alone—not other PESTEL factors (2014: 75). In fact, in *The 2nd Digital Revolution* Andriole et al. ignores all other PESTEL factors—even competitive factors—and argues that the constant innovations in new digital technology is the force that underpins all supply chain planning and management (2005: 60).

2.4 Research method

The research design process described up to this point has included: a literature review; the identification of a research problem, questions and aim; the choice of a quantitative perspective and a positivist epistemology; the decision to use a customised framework based on the SCOR model; the confirmation that the proposed research was logistically viable via the testing of a hypothetical example of a supply chain; the initial identification of types of data that could be useful; and how SWOT and PESTEL surveys were used to determine the applicability of these models (Table 4). It is now necessary to describe the method used and how it was applied—a description that explains why a census was conducted as the main data collection method.

In quantitative research, a relatively small statistical sample is often randomly selected from a larger population so that inferences can be made about that population from the sample's data (Bluman 2012: 12). This method is called 'sampling', and when done correctly it offers an unbiased view of the population at a fraction of the effort and cost that would be needed to survey the population (*ibid.*). However, 'in cases where a population is believed to be narrowly defined' and when a precise estimate of size is both needed and feasible to determine, the use of sampling may not be as practical or as accurate as using a census (Israel 1992: 2). This is because a survey of a small population can require 97% to 99% of the total population to be in the survey to achieve a high confidence rate, which is essentially a census of a small population (*ibid.*). Since past estimates by the UKFC/BFI have always been at levels that indicate a census of every movie could be feasible using public sources—hundreds rather than many thousands of films—and an accurate estimate of the total number of movies is consistent with the aim of this thesis, a population census was chosen as the main collection method so that the highest level of accuracy could be achieved (*ibid.*). This census consisted of four phases: secondary source identification; database design; data collection; and data quality adjustment (Table 7).

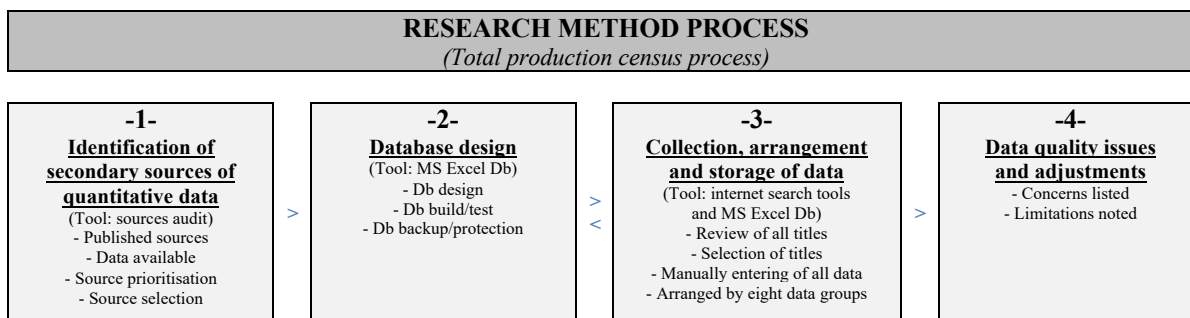


Table 7 - Research method process: total production census four phases

The initial attempt in this case was to establish empirically how many British low-budget films were made and if previous estimates were correct. Of equal importance was the identification of as many sources of data as possible on the 27 major decisions/tasks that had been identified in the sources audit and that had the potential to be quantitatively measured. During the census process, therefore, it was essential not only to identify films that should be included, but also to incorporate other data that would provide useful analysis of the sector and how it changed during the period. Before detailing how this total production census was undertaken, however, it helpful to note that the census took five years of part-time effort—July 2008 to July 2013—and resulted in the identification of: 44 potential secondary sources of data that was later qualified to 16 sources; 58 different data variables on the supply chain of each film; and ~10k possible films that was eventually qualified to 1,451 films that meet all the requirements for inclusion (~15% of all titles reviewed). The construction of the census database itself required ~85k different data entries—an effort separate from the qualitative review presented in Chapter One and the economic and cultural analysis that will be presented in the next six chapters.

2.4.1 Data sources and database design

The first phase of this process was to conduct a secondary sources audit to identify potential secondary sources that had statistical or textual data on low-budget films produced during the

digital revolution and of the nature identified in the hypothetical supply chain (Table 5). For a source to be considered, it had to have published its data in a way that was publicly available and that made clear how the data was acquired. The sources audit also considered the types of data held by each secondary source, the types of data eventually collected from each source and a way to prioritise the sources likely to be most useful. After a review of all publicly-available secondary data sources, the audit resulted in an initial list of 44 different sources that met the minimum criteria, which were later further catalogued, based on the years of the data they held, on their author/owner/funder and on any issues related to data quality (Table 8).

MAIN SECONDARY SOURCES USED*		
Databases audited and used	Data yrs.	Data group, authors and/or owners, other information
British Council Film Database* (britfilms.com)	2000 - 2013	Data group(s): A, C, F, G Owner/funder: British Council, a charity governed by a Royal Charter, a public body. Data: standard production listing information, technical format data and diversity genre and crew information. Data contrasted with data from FFE, IMDb, BFI and EIFF. Data origin: originator and referrer of primary sources. Most production data supplied directly from producer submissions via an openly editable content internet user model.
British Film Institute* (UKFC/BFI) (bfi.org)	2000 - 2014	Data group(s): A, B, C, E, F, G, H Owner/funder: BFI is a charity governed by a Royal Charter, a UK public body. Data: Mostly production data, but also some case study and economic data (by title, sector and total industry). Examples included detailed production data in the BFI sponsored report <i>Low and Micro-Budget Film Study</i> , specific confidential production data from the UKFC/BFI Research and Statistic Unit based on investment application data from 2000 to 2009 (via Sean Perkins and Angela Topping), the investment award database for data from 2000 to 2012 (NB: This database was later changed in 2016 to include data from 2011 onwards only), production data listed in the Skillset Fund Allocation Listings, some case study data in their monthly <i>Sight & Sound Magazine</i> , data from their British film archive, government policy responses, funding award procedures and policies. The <i>Statistical Yearbook</i> reports were also a major source of data for the production analysis presented in Chapter Three. Production data compared and verified with data obtained from FFE, IMDb, BC and EIFF listings. Merged with the data from the UKFC/BFI with the webpage ukfilmcouncil.org.uk . Data origin: originator, commissioner or original data and referrer of primary sources.
EIFF Film Festival Catalogues* (edfilmfest.org.uk)	2004 - 2009	Data group(s): A, B, C Owner: Edinburgh International Film Festival, catalogues no longer published. Data: production data compared and verified with data obtained from FFE, IMDb, BC and UKFC/BFI. Data origin: originator, commissioner of some research and referral of primary sources. Most production data supplied directly for producer submissions.
Film File Europe Database (FFE)* (filmfileeurope.com)	2000 - 2009	Data group(s): A, B, C, E, F, G, H Owner/funder: A Media Consulting Group database project co-financed by the UKFC and the EU MEDIA Programme, but no longer online after 2009. Data: until 2007 it was the largest online database for economic data on European film production, distribution and funding. Significant production data on UK low-budget films. Production data compared and verified with data obtained from UKFC/BFI, IMDb, BC and EIFF listings. Data origin: originator and referrer of primary sources. Most production data supplied directly from producer submissions via an openly editable content internet user model.
Internet Movie Database* (IMDb.com and IMDbPro.com)	2000 - 2016	Data group(s): A, B, C, E, F, G, H Owner: IMDb and IMDbPro are subsidiaries of Amazon.com. Data: extensive production data including, some revenue and industry data. Production data was verified with data obtained from FFE, BFI/UKFC, BC and EIFF listings. Data origin: originator, however most production data supplied directly from producer submissions. Most production data obtained by using a volunteer collection model of 'openly editable content' available to registered users.

OTHER SECONDARY SOURCES USED[^]		
Databases audited and used	Data yrs.	Data group, authors and/or owners, other information
Box office mojo[^] (boxofficemojo.com)	2000 - 2019	Data group(s): C, D Owner/funder: Amazon is owner through IMDb subsidiary. Data: box office data, some budget data. Data origin: referrer of primary data sources – likely Rentrak.
British Board of Film Classification[^] (bbfc.co.uk)	2000 - 2012	Data group(s): A Owner/funder: BBFC is an independent non-profit organisation. Data: Official BBFC ratings and verification of self-reported ratings. Data origin: originator.
Cinando[^] (cinando.com)	2003 – 2012	Data group(s): A, C, E Owner/funder: Marché du Film - Festival de Cannes. Data: Cannes market production listings data. Some economic statistics on industry and film marketing data. Data origin: originator and referrer of primary sources.
Cineuropa[^] (cineuropa.org)	2000 - 2012	Data group(s): B, E, G, H Owner/funder: EU supported via MEDIA Programme. Data: EU low-budget films, industry commentary, festival data. Resource portal for European cinema, filmmaker, producer data. Data origin: originator and referrer of primary sources.
Film London[^] (filmlondon.org.uk)	2006 - 2016	Data group(s): A, B, C Owner: Film London is a public-sector organisation, funded by the BFI and others. Data: production data, London Microwave listings, case study examples and film funding policy. Data origin: originator and referrer of primary sources.
Mandy.com Production Listings[^] (mandy.com)	2000 - 2016	Data group(s): A, B, C Owner: Mandy Network Ltd. is a private company (aka Blue Compass Ltd.). Data: production listings data. Data origin: originator, but most production data provided from producers.
MEDIA Programme Winner Database[^] (ec.europa.eu/media)	2000 - 2012	Data group(s): A, B, C Owner/funder: EU MEDIA Programme Data: economic details on all winners of the programme (<i>This is England</i>). Data origin: originator and referrer of primary sources.
Numbers.com[^] (the-numbers.com)	2000 - 2016	Data group(s): C, D Owner/funder: Published by Nash Information Services LLC. Data: box office data, some budget data. Data origin: referrer of primary data sources, likely Rentrak.
Rentrak[^] (rentrak.com)	2000 - 2012	Data group(s): D Owner: ComScore Data: domestic box-office data and industry statistics. Nielsen EDI used to be the firm, but in December 2009 it was acquired by Rentrak. All data used from Rentrak has been kept confidential since specific authorisation was required (unlike all other sources in this list). Data origin: an originator.
Screen International[^] (www.screendaily.com).	2000 - 2016	Data group(s): A, B, C, D, E Owner: Media Business Insight Ltd. Data: individual production listings data. Data origin: originator and referrer of primary sources.
Various promotional websites[^] (various websites)	2000 – 2012	Data group(s): A, B, C, E, F, G, H Owner(s): film production websites and marketing promotion. Data: Various individual sources. Data origin: originators.
SECONDARY SOURCES REVIEWED BUT NOT USED FOR DATABASE		
Databases audited	Data yrs.	Data group, authors and/or owners, other information
Arts and Business (andb.org.uk)	2003 - 2009	Data group(s): not used as a database source, see bibliography for any references. Owner/funder: Prince's Responsible Business Network - a UK non-profit. Data: some information on small-business models and miscellaneous data. Data origin: originator and referrer of primary sources.
Association of Film Commissioners International (afci.org)	2000 - 2012	Data group(s): not used as a database source, see bibliography for specific references. Owner/funder: self-funded consortium of film commissioners. Data: some data on selecting locations for low-budget films and govt. policy. Data origin: originator and referrer of primary sources.
Baseline FT (ft.com/baseline)	2000 - 2012	Data group(s): not used as a database source, see bibliography for any references. Owner/funder: Financial Times Data: case study information on film and television, some industry statistics. Data origin: originator and referrer of primary sources.
British Academy for Film and Television Arts (bafta.com)	2004 - 2014	Data group(s): not used as a database source, see bibliography for any references. Owner/funder: BAFTA is an independent non-profit organisation. Data: some case study information via interviews on the BAFTA Guru website. Data origin: originator.
Broadcasting Entertainment Cinematograph and Theatre Union (bectu.org.uk)	2000 - 2010	Data group(s): not used as a database source, see bibliography for specific references. Owner: independent trade union representing crew, merged with Prospect in 2017. Data: government policy responses. Data origin: originator and referrer of primary sources.
British Kinematograph, Sound and Television Society (BKSTS) (bksts.com)	2000 - 2016	Data group(s): not used as a database source, see bibliography for any references. Owner: now the International Moving Image Society, a non-profit organisation. Data: approaches to training and education data. In 2016 it changed its name.

		Data origin: referrer of primary sources.
Broadcast Now (broadcastnow.co.uk)	2000 - 2012	<u>Data group(s): not used as a database source, British television focused.</u> Owner: Broadcast Data: TV and radio industry portal, industry commentary, some commentary on TV broadcaster involvement/responsibilities in domestic film production. Data origin: originator and referrer of primary sources.
Cineaste (cineaste.com)	2000 - 2012	<u>Data group(s): not used as a database source.</u> Owner/funder: Cineaste magazine. Data: Some articles on American politics of the cinema. Resource portal. Data origin: originator and referrer of primary sources.
Directors Guild of Great Britain (dgggb.co.uk)	2000 - 2012	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner: ceased operations in 2017, replaced by the Directors Charitable Foundation Data: directors codes and industry policy statements. Data origin: mostly referrer of primary sources.
Equity (equity.org.uk)	2000 - 2012	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner: independent trade union representing cast (performing artists) Data: actor codes and industry policy statements. Data origin: originator and referrer of primary sources.
Film Comment Magazine (filmlinc.org)	2009 - 2012	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner: Film Society of Lincoln Center. Data: diversity discourse contributions. Data origin: originator and referrer of primary sources.
Film Distributors' Association (FDA) (launchingfilms.com)	2000 - 2012	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner: the FDA is a trade body representing UK film distributors. Data: domestic distribution statistics and government policy positions. Annual <i>FDA Yearbook</i> contained data on annual exhibition trends and box-office revenue on a national level. Reports are prepared independently of government sources and provide data that helps identify the inefficacies of domestic distribution compared with the US studios and the challenges faced by independent producers to gain distribution and exhibition in the domestic market. Data origin: originator and referrer of primary sources.
GreenCine (greencine.com)	2000 - 2012	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner: GreenCine was an independent company, ceased operating in 2015. Data: film consumer portal with a Netflix type operation, but also articles, film production support data, podcasts and reviews. Data origin: referrer of primary sources.
IndieWire (indiewire.com)	2009 - 2012	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner: IndieWire is an independent company. Data: independent film portal. Data origin: originator and referrer of primary sources.
Hollywood Reporter (hollywoodreporter.com).	2000 - 2016	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner: the Hollywood Reporter is an independent company. Data: production listing data. Data origin: originator and referrer of primary sources.
New British Cinema Quarterly (nbcq.co.uk)	2010 - 2013	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner/funder: independent UK web film magazine. No longer published. Data: individual production listings. No longer published. Data origin: originator and referrer of primary sources.
Netribution Film Network (netribution.org)	2000 - 2002 2006 - 2014	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner/funder: now an independent user blog on the web. Data: some industry data and production listings. First a weekly newsletter, then as a user submitted site. Data origin: originator and referrer of primary sources.
New Producers Alliance (npa.org.uk)	2000 - 2010	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner/funder: independent association. Ceased operations in 2010. Data: domestic industry information, mostly on low-budget production. Data origin: referrer of primary sources.
Pearl & Dean (pearlanddean.com)	2000 - 2012	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner: an independent company. Data: UK cinema and distribution statistics. Data origin: mostly an originator, but sometimes a referrer of primary sources.
Premiere Magazine (premiere.com)	2000 - 2010	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner: Hachette Fillpacchi Media US. Data: production listings data. Data origin: originator and referrer of primary sources.
Production Guild of Great Britain (productionguild.com)	2000 - 2012	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner: independent guild. Data: training and skills data, industry statistics and some production listings. Data origin: originator and referrer of primary sources.
Raindance (raindance.co.uk)	2000 - 2012	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner: an independent organisation. Data: Raindance film festival website contained production listing data, training and skills development concepts and the British Independent Film Awards site contained some production data. Data origin: originator and referrer of primary sources.
Scottish Screen Archive (ssa.nls.uk)	2000 - 2010	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner/funder: former public-sector organisation, now Creative Scotland. Data: Scottish screen production listings data. No longer updated, still online. Data origin: originator and referrer of primary sources.

Screen Rush (www.screenrush.co.uk)	2009 - 2013	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner: independent company. No longer published. Data: production listings data. Data origin: originator and referrer of primary sources.
Studio System (studiosystem.com)	2000 - 2012	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner: an independent company in the USA. Data: film and TV professional contact database. Data origin: originator and referrer of primary sources.
UK Government of Culture, Media and Sport (culture.gov.uk)	2000 - 2012	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner: government department. Data: government policy and tax information. Data origin: an originator.
Variety International (variety.com)	2000 - 2016	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Author: an independent company. Data: production listing data. Data origin: originator and referrer of primary sources.
Writers Guild of Great Britain (writersguild.org.uk)	2000 - 2012	<u>Data group(s): not used as a database source, see bibliography for any references.</u> Owner: a trade union for writers. Data: writer codes and industry policy statements. Data origin: originator and referrer of primary sources.

Table 8 - Secondary data sources audit: results

Several observations were also made during this stage of the audit. In particular, instead of 27 types of variables based on the 27 major decisions identified during the hypothetical supply-chain study (Table 5), the audit identified 58 data variables included in the secondary sources altogether. This was a welcome discovery, not because of the mere fact that 58 data variables had been identified when initially only 27 variables had been identified during the hypothetical supply chain, but because these additional variables offered the opportunity to provide a more comprehensive study of the low-budget sector than had ever been undertaken. There were, however, issues with this new discovery—aside from the additional effort that would be required to gather and process this extra data—since the number of variables given by each source varied significantly. For instance, the Internet Movie Database (IMDb) gave 32 different types of variable, whereas The Numbers gave only four. It was also found during the source audit that five secondary sources contained more data variables than all the other sources combined, 11 sources gave only a relatively small number of variables and 28 sources did not contain any significant amount of data points that could be used to propagate the database on a large enough scale (Table 8). The ‘five main secondary sources’ that gave the most variables for the most films were IMDb, Film File Europe (FFE), the British Council (Britfilms.com), the Edinburgh International Film Festival (EIFF) catalogues and the UKFC/BFI (Figure 9).

Secondary data sources audit

44 sources reviewed

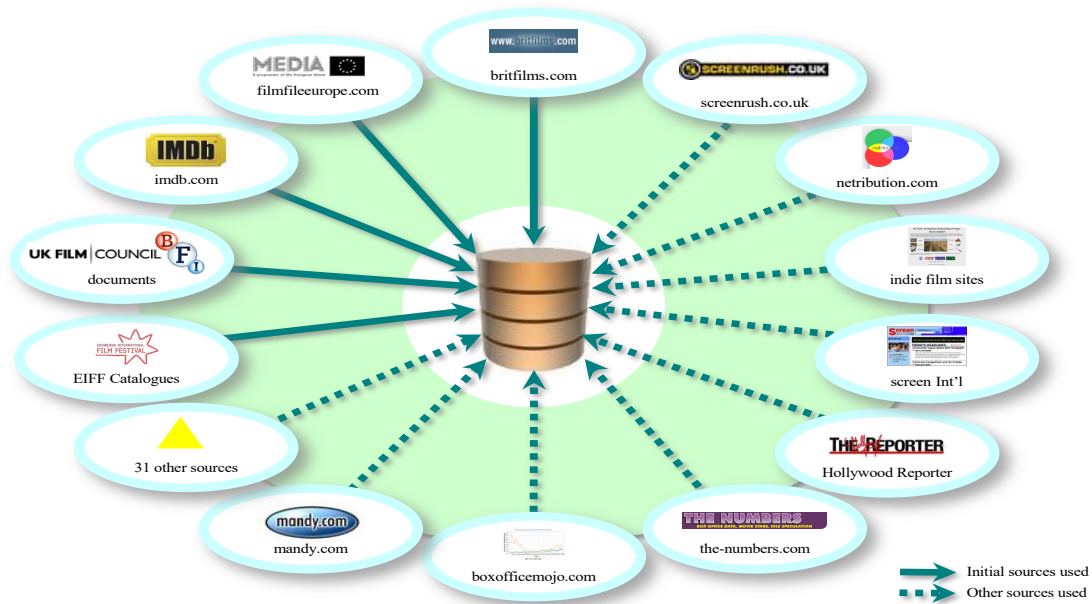


Figure 9 - Secondary data sources: sources identified

Furthermore, many of the variables given in IMDb were also found in other sources, but in an inconsistent manner. For example, the four types of variable given by The Numbers were found only in Box Office Mojo (Table 8). This inconsistency and the large number of variables made it necessary to classify these 58 different variables into eight general groups so that their holdings could be catalogued.⁸⁵ Based on the types of research questions the data would be used to help answer and their general classification in the low-budget film supply chain, these groupings were: manufacturing product data (Group A); delivery data (Group B); financial data on manufacturing (Group C); financial information on delivery (Group D); data on festival participation (Group E); director profile data (Group F); miscellaneous technology data (Group G); and miscellaneous other data (Group H) (Table 9). These groupings not only simplified the sources audit process by providing a way to catalogue the data succinctly in each source, but it also offered a rudimentary architecture for the database before data collection (Table 9).

⁸⁵ These groupings were based on an intuitive approach.

VARIABLES CONTAINED IN EACH MOVIE RECORD <i>(by group category)</i>	
GROUP A: Manufacturing Product Data <i>(Used for both economic and cultural analysis)</i>	GROUP B: Delivery Data (Distribution/Exhibition) <i>(Used primarily for economic analysis)</i>
Title of film (in English only) Year film completed Director (first billed only) Producer (first billed only) Exec producer (first billed only) Screenwriter (first billed only) Cast (first billed only) Locations (first three listed only) Production Company (first billed only) Genre (first billed only—see Appendix E) UK BBFC rating (if rated, otherwise NR) Length (in minutes) Filmed format (technology used) Script development process (free form survey response) Adapted screenplay (yes/no) Production duration (in weeks if known) Minority / arthouse subject matter (e.g. LGBT)	Year distributed (domestic) First distribution format (domestic) Average time delay from year completed to year distributed (domestic) Year distributed (foreign) First distribution format (foreign) Average time delay from year completed to year distributed (foreign) Commercial DVD available Commercial web streaming or download available (legal: fee) Commercial web streaming or download available (legal: free) Commercial web streaming or download available (illegal) Sales agent (yes or no) Sales agent (name) Distributor (yes or no) Distributor (name) IMDb ratings (average rating) IMDb ratings (number of ratings) Rotten Tomatoes ratings (average critic’s rating – meter) Rotten Tomatoes ratings (average audience rating)
GROUP C: Financial Manufacturing Data <i>(Used primarily for economic analysis)</i>	GROUP D: Financial Delivery Data (Distribution/Exhibition) <i>(Used primarily for economic analysis)</i>
Budget (lowest published number) Budget data source (author/owner) Co-production countries (if listed) Funding sources (both public and private if listed)	Box-office revenue (domestic gross) Box-office revenue (world-wide gross)
GROUP E: Film Festival Data <i>(Used primarily for cultural analysis)</i>	GROUP F: Director Profile Data <i>(Used primarily for cultural analysis)</i>
Film festivals attended (number) Film festivals attended (name of festival, priority top FF) Film festival awards (number of wins) Film festival awards (number of nominations) Film festival awards (title of top wins and nominations)	Director background – BAME (yes or no) Director background – female (yes or no) Director background – debut feature (yes or no) Director background – last feature (yes or no) Director background – had TV credits (yes or no) Director background – had a TV career BEFORE first feature (yes or no) Director background – had a TV career AFTER first feature (yes or no) Director background – film academy trained or degree in filmmaking
GROUP G: Miscellaneous Technology Data <i>(Used to study growth-from-innovation evidence)</i>	GROUP H – Miscellaneous Sundry Data <i>(Used for both economic and cultural analysis)</i>
Technology observations (free form survey response) Other PESTEL observations (free form survey response)	Interesting websites (commentary and movie promo) Special Notes (free form survey response)

Table 9 - Secondary data sources audit: data groups and database structure

2.4.2 Data collection

Since the results of the audit revealed that five main sources contained a larger number of data variables, that 11 of the remaining 39 sources had some relevant variables and that there were 58 types of data variable, it became evident that a logical collection process would have to be used to propagate the database in an efficient and effective manner. Otherwise, it would have been an inefficient use of time and resources to review all 58 data variables in all 44 secondary

sources for each potential film, an exercise that could have resulted in literally many thousands of redundant data searches. To simplify the collection process, the newly designed database (Table 9) was initially propagated with data from the five main secondary sources and structured so that it would take the most advantage of this approach. For example, only the 32 data points relevant to IMDb data were visible for data entry when the IMDb data was entered.

However, before full-scale data collection was begun, it was also necessary to identify all the low-budget films made during the digital revolution that had to be included in the census based on the criteria noted in Chapter One. This search began by entering all the British productions from 2000 to 2012 listed in Britfilms.com, FFE, the EIFF catalogues and the UKFC/BFI award database, and then cross-referencing those titles with IMDb using country-based search word identifiers. This undertaking resulted in ~10k films being initially identified as having at least been made in the UK between 2000 and 2012, and by an British independent production company, but this list of films also included movies that can be described as shorts (<40 minutes runtime), student films, titles mistakenly listed more than once and others made for terrestrial television. After further cross-referencing to eliminate those titles and films that were found to have been made for >£2.5m, this list of ~10k films was then further narrowed down to 3,037 films. Finally, this list was further narrowed down to 1,451 movies that met all the definition requirements needed to be listed as UK low-budget films in this study. However, this total of 1,451 did include 205 films with no verifiable budget, but because they exhibited other product traits that strongly suggested that they had been made for ≤£2.5m they were also included in the census; films that fall into this category included ones that had been made with a consumer digital camera, ones that had used a no-name cast and crew and ones that had been produced by a company with a history of low-budget productions. Therefore, the decision to include such productions was based on intuitive judgement of the evidence available.

Once the census list of 1,451 low-budget films was finalised, the total population in statistical terms, the next stage in the data collection process was to physically enter each of the 58 data variables for each film record (Table 9). This required ~84k (1,451*58) individual data points and ~420k cross-references for the first five main sources checked. Rather than checking every source for every data point, the five main sources were again used as the initial sources for the majority of data. Since IMDb held the most data when compared with the other sources, it was used as the first source for the 32 variables it contained of the 58 variables identified during the sources audit (Table 10). While the EIFF catalogues and FFE often held more data or more accurate data on certain films in certain years, the IMDb data was still used as the first source for filling in the database since it offered the most expedient way of acquiring data that would later be cross-referenced. At this point it should again be stressed that IMDb was not used as the only source for these 32 variables, but rather it was the first source used in the collection process. This is because after the IMDb data points were entered into the database, they were cross-referenced with their corresponding values in other sources to confirm if their values agreed. In fact, all 16 sources deemed useful in the audit were cross-referenced to ensure every movie record of 58 variables was completed and was as accurate as possible (Table 10).

VARIABLES COLLECTED AND THEIR INITIAL SOURCES	
<i>(single movie record)</i>	
Data variable	Notes and initial secondary sources used
Title of movie	EIFF, Film File Europe and/or IMDb.
Year production completed	Earliest year recorded. EIFF, Film File Europe and/or IMDb.
Director	First listed director only. EIFF, Film File Europe and/or IMDb.
Producer	First listed producer only. EIFF, Film File Europe and/or IMDb.
Exec producer	First listed exec producer only. EIFF, Film File Europe and/or IMDb.
Screenwriter	First listed writer only. EIFF, Film File Europe and/or IMDb.
Cast	Top billed cast member. EIFF, Film File Europe and/or IMDb.
Locations (primary)	Main locations only. EIFF, Film File Europe and/or IMDb.
Production company	Main company listed on Film File Europe and/or IMDb.
Genre	Top listing only. Promotional, EIFF, Film File Europe and/or IMDb (Appendix E).
UK BBFC rating	IMDb and/or BBFC website.
Running time (mins)	IMDb.
Filmed format	Promotional material, EIFF, Raindance, Film File Europe and/or IMDb.
Budget	Lowest value reported. Promotional material, EIFF, Film File Europe and/or IMDb.
Budget source data	Source listing and cross referenced.
Co-production countries	If applicable
Funding source(s)	Private or public sector, named organisation always noted when verified.
Year distributed in UK	Earliest year recorded. Nielsen EDI/Rentrak, Film File Europe and/or IMDb.
Time from completion to domestic release (years)	Calculation.
First distribution format used in UK distribution	IMDb.

Year distributed in foreign territory	Earliest year recorded. Nielsen EDI/Rentrak, Film File Europe and/or IMDb.
Time from completion to foreign release (years)	Calculation.
First distribution format used in foreign distribution	IMDb.
Box-office receipts (domestic)	Lowest reported. Nielsen EDI/Rentrak, thenumbers.com or boxofficemojo.com.
Box-office receipts (foreign)	Lowest reported. Nielsen EDI/Rentrak, thenumbers.com or boxofficemojo.com.
Commercial DVD available	Yes/no. Web search (e.g. amazon.co.uk)
Online streaming or download available	Yes/no. Web search (e.g. distrify.com)
Online legal: fee download available	Yes/no. Web search (e.g. distrify.com)
Online legal: free download available	Yes/no. Web search (e.g. youtube.com, vimeo.com)
Illegal download available	Yes/no. Web search (e.g. napster.com and limewire.com)
Script origin and development	Promotional materials, EIFF, Raindance and/or IMDb
Adapted screenplay	Yes/no. Source from promotional materials
BAME stories and/or main characters prominent	Film review.
Special notes	N/A
Interesting websites	N/A. Most list the main promotional website.
Number of recognised film festivals attended	Festival listings and/or IMDb.
Main festivals attended	IMDb.
Number of film festival awards (nominations)	Promotional materials, festival websites and/or IMDb.
Number of film festival awards (wins)	Promotional materials, festival websites and/or IMDb.
Key awards won	Promotional materials, festival websites and/or IMDb.
Director ethnicity	Promotional materials.
Director gender	Promotional materials.
Debut feature (as director)	Promotional materials. Film File Europe and/or IMDb.
Last feature (as director)	Promotional materials and/or IMDb.
TV career (as director – before)	IMDb.
TV career (as director – after)	IMDb.
Sales agent	Promotional materials and/or IMDb.
Distributor	Promotional materials and/or IMDb.
Self-distribution	Yes/no.
IMDb average rating	IMDb.
IMDb number of ratings	IMDb.
Rotten Tomatoes average audience rating	Rotten Tomatoes.
Formal training of director	Promotional materials.
Formal training of producer	Promotional materials.

Table 10 - Secondary data sources: variables collected and their initial sources

2.4.3 Data arrangement, storage and quality

The main tool used to build, store, back up and analyse the data obtained from the secondary sources was a Microsoft Excel spreadsheet. This served as an ideal database since its columnar structure could be adapted to the different requirements needed during the five phases of the census process (Table 7). As already noted in the initial use of IMDb data, during the collection phase, for example, if a source with data for five variables was being extracted, the spreadsheet could be rearranged in a way that was convenient for data input by positioning the relevant input columns adjacent to each other. The database could also be arranged into the eight data groups during the analysis phase, a function which allowed data to be analysed in numerous ways, including the different approaches discussed in the next section, and the comparison of standard deviations described in Chapter Three. While it should be admitted that the database

was used more as a hierarchical database rather than as a matrix database for data retrieval, the spreadsheet's structural flexibility was matched by its capacity to store and securely back up all the data collected.⁸⁶ The robustness of the tool was proven in this case after the first batch of ~25k separate pieces of data from IMDb was entered into the database. The basic hierarchal structure of the database was then 'stress tested' in order to ensure that Excel would be able to hold and process the expected amount of data fast enough to be used on a personal computer. This was done by quadrupling the storage size of the database, by copying and repasting the preliminary data four times, and then by performing several data sorting tests, graph tests and off-site storage tests, before the main data collection phase was started. After these tests, the spreadsheet proved to be able enough to handle the expected storage and analysis requirements.

All the data used in this thesis still had to be manually extracted from their original source and entered into the database one variable at a time. No automatic data extraction routines or robots were employed since it was essential to ensure that the data entered for each variable for each production was of the highest accuracy (Table 10). The sustained effort involved in completing this task in the census was, of course, considerable, and is the reason why the census needed five years of part-time effort to complete. One way to illustrate the amount of physical labour that was needed to complete this exercise is to consider the final database record for *Dead Man's Shoes* (2004) and where the 58 variables it contains were eventually sourced. Like most of the records created in the database, the record for *Dead Man's Shoes* had ~75% of its data derived from the initial five sources, but after further cross-referencing and quality checks that ratio fell to ~60%, with the remaining ~40% coming from nineteen different sources (Table 11). The other 1,451 movie records were similarly propagated, first by using the initial main

⁸⁶ Hierarchical databases searches were based on the movie title, whereas matrix database searches were based on multiple variables.

sources and then cross-checking the data already held against other sources identified in the audit, which resulted in the creation of a comprehensive census database on the sector.

MOVIE DATABASE RECORD	
<i>(Dead Man's Shoes)</i>	
Variable	Data recorded
Title of movie	Dead Man's Shoes
Year production completed	2004
Director	Meadows, Shane
Producer (top billed)	Herbert, Mark
Exec producer (top billed)	Carlton, Peter
Screenwriter (top billed)	Considine, Paddy
Cast (top billed)	Considine, Paddy
Locations (primary)	Derbyshire
Production company	Warp Films
Genre (first listed)	Crime
BBFC rating	18
Running time (mins)	90
Filmed format	S16mm
Budget	£695,393
Budget data source	Multiple sources confirm same number, incl. IMDb, UKFC/BFI award data, etc.
Co-production countries	N/A
Funding source(s)	FilmFour, East Midlands Media Initiative, European Regional Dev. Fund, EMMI
Year distributed in UK	2004
Time from completion to domestic release (years)	0
First distribution format used in UK distribution	Theatrical
Year distributed in foreign territory	2006
Time from completion to foreign release (years)	2
First distribution format used in foreign distribution	Theatrical
Box-office receipts (domestic)	£119,795
Box-office receipts (foreign)	£123,800
Commercial DVD available	Yes
Online streaming or download available	Yes
Online legal: fee download available	No
Online legal: free download available	No
Illegal download available	Yes
Script origin and development	Spec script
Adapted screenplay	No
BAME stories and/or main characters prominent	N/A
Special notes	Film Finders had a £730k budget listing, BFI handbook had £1.5m, FFE lowest
Interesting websites	http://eulerfoundation.com/archives/dead-mans-shoes.html
Number of recognised film festivals attended	15
Main festivals attended	EIFF 04, Venice 2004, Toronto 2004
Number of film festival awards (nominations)	13
Number of film festival awards (wins)	4
Key awards won	BAFTA 2005 & BIFA 2004, Dinard 2004 & DGGB 2005
Director ethnicity	White
Director gender	M
Debut feature (as director)	No
Last feature (as director)	No
TV career (as director – before)	No
TV career (as director – after)	Yes
Sales agent	Element X
Distributor	Optimum Releasing
Self-distribution	No
IMDb average rating	7.7
IMDb number of ratings	24,508
Rotten Tomatoes average audience rating	56%
Formal training of director	Yes
Formal training of producer	Performing arts course at Burton College

Table 11 - Example of a single database record

It is important to note, in order to avoid any later confusion, that two numbers are used in this thesis to describe the number of low-budget films that were made during the digital revolution. The first is 1,451; this number signifies the ‘actual number’ of movies identified during the data gathering phase. The second number is 1,552; this number is the ‘adjusted estimate’ of the number of films made during the digital revolution. The difference between these two totals is 101 unidentified films. The reason for this difference is that when the data gathering phase was completed in mid 2013, only 99 films had been identified for the 2012 year. Since the average delay between end of production and distribution for the actual number of 1,451 films was 1.2 years (Chapter Six), it was reasonable, prudent and consistent with time series trends that will be presented in Chapter Three to make an adjusted estimate of 200 films to the 2012 total. This was done by adding another 101 unidentified productions in the \leq £500k category to the 99 films identified for the 2012 year to provide a more reasonable estimate of 200 for the year and an adjusted estimate of 1,552 for the period. In the interests of academic clarity, when a total, trend or figure includes the adjusted estimate it will be labeled ‘2012*’.

Certain data quality issues were discovered during the census process and some of these issues exacerbated what weaknesses there are in the research framework. This was particularly the case for financial data extracted from the secondary sources since the original sources of this data were low-budget producers. As Simens noted, public statements on budget levels for low-budget movies are, by nature, not ideal for academic research because it is in the interests of producers to overstate such totals during the delivery sub-process to foster the perception—especially among acquisition executives—that they made a more expensive movie (2003: 123). The level of such exaggeration in the data acquired, however, is difficult to estimate with any level of accuracy, and to provide the most reliable estimates possible using such sources, the

lowest cost and revenue numbers found in any ‘credible source’ was used.⁸⁷ This method was also time-consuming because every budget and distribution number was cross-referenced with all the secondary sources in the audit so that the lowest totals could be obtained. This was deemed the most ‘conservative approach’ and explains why the estimates for sector production expenditure and distribution revenue presented in Chapter Seven are likely to be the lowest possible reported values that could have been estimated using public sources.

One film that typifies this issue and how it was mitigated during cross-referencing is the 2006 film *Six Bend Trap* (also known as *Thugs, Mugs and Dogs*). This crime film was directed by Mike McCarthy, has a runtime of 110 minutes and a cast that includes a well-known adult-entertainment actress. Like other films made with miniscule budgets, it was shot on HDCAM, has a BBFC 18 rating and had a direct-to-DVD release. Yet, when the film’s online listings were reviewed, there was a considerable level of discrepancy in the budget recorded and how that data changed in the years that followed the movie’s release. The history of this discrepancy begins in 2007 when IMDb first listed it as £1.4m, and then decreases precipitously to £500k in 2008 based on its FFE record, to ~£40k based on a 2011 interview of the director posted on YouTube and to finally <£1k with deferrals based on a 2015 interview of the producers that was on Vimeo.⁸⁸ Interestingly, an extreme example of some of the data integrity issues found at the data arrangement stage was the film’s Wikipedia page—not considered a credible source, but noted here for illustrative purposes—since it was even more erratic in its reporting, stating in 2006 that the film cost £4.5m, but then revising that figure down to £4.50 in 2011 and then finally to £0.45 in 2014.⁸⁹ Although any comment on the involvement and possible motives of

⁸⁷ A ‘credible source’ is defined as any report, article, book, monograph or festival listing that has been published by an industry organisation or individual with an established record in the film industry and is available for peer review and/or public commentary.

⁸⁸ Both of these interviews were originally on YouTube but have since been removed and therefore cannot be specifically sourced.

⁸⁹ *Brick Lane* (2007) is an example of a movie that was ultimately not included after it was found that its budget was higher than first identified. Specifically, IMDb had a total of £2.5m, but Sarah Gavron stated to the *Evening Standard* that £3m was the actual cost of production (2007).

the producer in this case would be speculative, it is reasonable to hypothesise that this chronology is illustrative of some producers' choice to inflate the published cost of their films during the later stages of the delivery sub-process, but after sales opportunities have waned, dispense with such ploys in favour of being personally credited as resourceful filmmakers.

The aim of this thesis, however, required a determination on these findings and, for this reason, a nominal £5.00 was recorded for *Six Bend Trap* as its budget in its database profile record in order that the lowest budget aggregates could be presented in Chapter Seven. The rationale for this decision was based on evidence showing that the film was financed with deferrals/pro bono work, and on the aim to present estimates as conservative as possible, conservative in this case meaning the lowest budget number published so that, when aggregated, it could be interpreted as a more probable total when compared to the industry total made by the UKFC/BFI.⁹⁰

Data-integrity issues like those observed on *Six Bend Trap*, therefore, needed to be mitigated during data collection, and another way in which this was accomplished was by comparing suspected cases of budget exaggeration with data that was contractually required to be accurate. The UKFC/BFI offered two sets of data of this type: confidential data based on the investment grant applications made from 2000 to 2009, and data from their lottery-award database.⁹¹ The confidential data used herein was obtained from the BFIRSU, under a film title non-disclosure agreement whereby the data could be used only to estimate sector-level aggregates and trends. The origin of this data was completed production grant application forms submitted to national lottery-aligned agencies such as the UKFC/BFI, Scottish Screen and Northern Ireland Screen.

⁹⁰ In cases where no budget or distribution data was found, this was also recorded, and such films were excluded from any quantitative analysis.

⁹¹ The UKFC/BFI lottery award database was changed in 2016 to include only data from 2011 onwards, but the 2000 to 2012 quantitative data used in this thesis was obtained from this database in 2014 before the change occurred. National and regional screen agencies also provided this type of information on their websites, but grant recipient data for films between 2000 and 2012 is no longer available online.

Since these forms always required the producer to provide a projected budget and a cash flow projection as part of the application process, it is likely that this data was accurate to actual production spend. However, in an effort to add a higher level of verification to this research, this data was also compared to the UKFC/BFI's online award database.⁹² While this database did not include any production cost totals, it did supply the total public-sector investment that a project received. This number was useful since it not only helped identify the sources of public-sector investment that is used in Chapter Five, but was also useful in estimating the total budgets for certain films made after 2009 when no other credible evidence was found.⁹³

Another tangential problem with the data is that many of the secondary data sources identified in the audit acquired their data via a collection model based on 'openly editable content' from internet users. This issue was noted in the secondary sources audit for those sources which used this model, including all five main secondary sources, and while it is true that these sources often included a verification or a confirmation stage in their data-submission processes, most of their data was probably obtained from the producers of the films whose data was being submitted (Table 8). In the case of qualitative data, such as cast, crew and location names, few quality issues were found based on a review of the 'rear title crawl credits' of the films, which was expected since producers are legally obligated—based on the contracts they sign with their cast and crew—to provide such data as accurately as possible to the public during the delivery sub-process stage (Alberstat 2000: 321–407). However, for commercial cost and revenue data, producers seldom have such a legal obligation to provide the public with such information.

⁹² Only projects that were completed, irrespective of whether they received a public-sector grant, were included in the total population census.

⁹³ This was possible because public-sector agencies usually had a maximum investment policy, such as a percentage of the total budget, and this could be used to estimate the total budget. For example, Scottish Screen had a maximum single project award of the lower of either £50k or 20% of the total proposed budget (2009). Thus, in the absence of other data, a £20,000 award would suggest a £100k budget.

2.5 Research approaches

The predominant analysis approach used in this study is descriptive since it offers plausibility arguments based on quantitative method analysis. This type of analysis was chosen during the research design phase because it was deemed to be appropriate when based on Easterby-Smith's approach definitions (2008: 212–223) and Latham's alignment principle (2016: 47). While some correlational and causal-comparative approaches are also used, most of the quantitative data has been descriptively analysed through the use of aggregates, averages, frequencies, percentages, geographic locations, groupings and time series studies (Easterby-Smith et al. 2008: 234). The full list of descriptive approaches used in this study were noted at the start of this chapter and their merits/limitations are extensively discussed by Dunleavy (2003), Blaxter et al. (2010) and others who not only define these approaches, but also detail how they are often used in academic research (Table 4). It is therefore unnecessary to restate these definitions in this chapter, but it is worthwhile to note some of the ways in which they have been applied to the estimation of the sector's economic and cultural contribution.

This thesis considers these different approaches as a single group of quantitative measurements that together offer a broad interpretation of value. In effect, this group of measurements extends the small amount of published research on the sector and its supply chain to include economic and cultural achievements that manifest themselves at the end of the script-to-screen process. This more 'holistic approach' is seldom used in movie arts or economics academic research, but it is often practised by the UKFC/BFI in their effort to encourage the production of films that 'reflect the public' and that show 'a bold vision and creative excellence ... unlikely to be financed by the marketplace' (BFI 2015).⁹⁴ This is because the UKFC/BFI application

⁹⁴ Other examples of equal consideration to economic and cultural benefits of production are the aims of the DCMS stated on their website and the aims of the UKFC/BFI, stated in *UK Film: Digital Innovation and Creative Excellence* (2011; 2010: 4).

form for production funding not only requires a detailed business plan, but also an explanation of how ‘British culture’ and diversity will be advanced by the applicant’s proposed film project. While this additional consideration of public benefit is not used in the commercially weighted ‘green-light’ approval systems often attributed to Hollywood studios, it reinforces the view that a holistic approach to contribution, where cultural benefits are more equally considered with economic benefits, is an accepted way to assess film industry sectors that are characterised by the industry peculiarities described in the previous chapter. Therefore, based on this reasoning, a customised Measurable Economic Activity (MEA) measurement derived from elements used by the UKFC/BFI in their Gross Value Added (GVA) calculation, and certain audience reach and diversity measurements were the main descriptive approaches used in this thesis to provide an overall estimate of contribution to the British motion-picture industry.

2.5.1 Economic contribution approach

In economics, the monetary value of a national industry can be measured differently. Vogel alone has used theatre admissions, box office revenue, IPR valuations, balance sheet totals, composite ratios, brand value estimates amongst others (2007). There is, however, another more aggregate measure of economic contribution that is both widely used and broad enough to be aligned with the holistic approach attempted in this thesis—this measurement is the GVA. The UKFC/BFI has published annual GVA estimates since 2008 and uses it to study the industry’s ‘ability to generate income for its workers, company owners and investors’ (UKFC 2008: 148). Similar to other ‘Value Added’ estimates used in economics (Samuelson and Nordhause 2010: 875), the UKFC/BFI’s GVA estimate includes all ‘wages, interest, profit components and output by a firm or industry’ and, therefore, measures ‘the direct contribution an industry makes to UK Gross Domestic Product ... [based on its] turnover minus the cost of

inputs bought from other industries' (BFI 2014: 224).⁹⁵ This definition therefore suggests that the GVA would have been an ideal measurement to adopt for this thesis since it has already been used in a local context and could have made like-for-like comparisons more possible.

Unfortunately, however, the UKFC/BFI's version of the GVA could not be wholly adapted to the low-budget sector since it includes certain direct and non-direct economic estimates that could not be measured due to either a lack of verifiable data or that they were not relevant. In particular, the UKFC/BFI GVA includes direct cost and revenue estimates, including costs for marketing and revenue from online exhibition, DVD and other IPR sales, that are confidential in nature and that could not be found in the secondary sources surveyed (Table 8). Likewise, non-direct economic factors, such as economic contributions made to tourism via the multiplier effects gained from the promotion of British locations or UK-made products in other countries, are also in the UKFC/BFI GVA, but are of a nature that they tend to be more attributable to more costly films with higher foreign release rates or to large firms that outsource parts of their supply chains (Northern Alliance 2008: 33). These elements do not apply to most low-budget films, but even for bonded films that might be likely to make such a value-added contribution, no information could be found to help generate a more GVA-like estimate for the sector. For these reasons, a simpler MEA estimate was used as the economic part of the holistic approach used herein so that a relational estimate of the sector's economic contribution could be made and compared to an equivalent estimate for the domestic industry (Chapter Seven).

As with the UKFC/BFI GVA, the MEA estimation includes all the production expenditure in the supply chain process, but in this case the aggregate expenditure will be based solely on the

⁹⁵ The UKFC/BFI note the 'main components of value added are wages and salaries, interest and company profits' in their *Statistical Yearbook*, therefore, it is a 'measure of an industry's ability to generate income for its workers, company owners and investors' (2014: 224).

production budget totals that were found during the data collection stage, and all the identified box office revenue achieved by the sector during the digital revolution. It is regrettable that intermediate consumption costs, specifically those related to the costs of raw materials and included in the UKFC/BFI GVA estimate, could not be included in this study so that a more tested GVA measurement approach could be used, but as already noted in regard to marketing costs and certain revenues, no such data was found in the secondary sources surveyed (Table 8). The MEA approach is therefore limited in how it can be applied and interpreted since it is based on total expenditure of production and total box office revenue achieved, but despite this limitation it still remains a suitable measure for assessing the aggregate economic activity of the sector. This is because the MEA estimate in Chapter Seven still includes the majority of spending in the supply chain and, in this particular case, is used to measure a sector that seldom exhibits the use of marketing funds or the purchase of raw materials from outside of the movie industry. Together with the availability of similar data on an industry level, this situation meant that the MEA was, in effect, the only measure of economic contribution that could have been estimated and the only one that could be used to conduct sector-to-industry comparisons.

2.5.2 Cultural contribution approach

To explain the cultural component of the contribution approach used in this thesis it must first be acknowledged that during the research design phase it was observed that: culture is easier to define as a word or concept than it is to obtain a consensus on how to interpret such a word or concept, and that cultural benefit analysis is more in the realm of social anthropologists, who often use qualitative methods, such as case studies and ethnographic research, than the quantitative perspective adopted in this study.⁹⁶ There are therefore many potential ways of

⁹⁶ These observations were based on the findings of Raymond Williams and Clifford Geertz (as cited in UKFC 2009: 8–9).

measuring the cultural impact of a group of movies, and before one of them could be selected for use in this thesis it was necessary to have a definite idea of what is culture. The one chosen for this thesis was based on the Oxford Dictionary definition that states culture is ‘arts and other manifestations of human intellectual achievement ... [such as] ideas, customs and social behaviour of a particular people or society’ (2014). Of course, this definition can be interpreted in different ways by different researchers, but the UKFC/BFI has in the past sponsored research that has defined culture in ways that suggest that any effect on the views or actions of a society involving the exhibition of art, like when it is publicly celebrated, discussed or has empowered a section of society, can be used as a measure of cultural impact (2009: 5).

An example of how the UKFC/BFI has applied this interpretation can be found in *Stories we tell ourselves: The Cultural Impact of UK 1946–2006* (2009). This comprehensive study was based on an ‘intuitive sample of 200 films generally regarded by professional observers as significant’, a random sample of 200 other films to act as a ‘reality check’ to the first sample, and 30 case studies of films that were deemed as ‘culturally significant’ (ibid.: 5–6). The method used to measure the sample survey was based on a set of ‘indicators’ that were ‘period, location, genre, creative source and ethnic representation’, while the case studies were examined using three ‘indices’ that were classified as ‘original impact (box office, awards), extended impact (DVD re-issues and restorations) [and] wider impact (citations in other media, evidence of esteem, impact on social or cultural behaviour, IMDb ratings and ... YouTube clips)’ (ibid.: 5–6). Amongst its many findings in this respect was that it found four types of cultural impact: censorship and notoriety, quotations in media (music, TV), zeitgeist moments where films captured the ‘preoccupations of their times and earned a place in popular culture’ and cumulative impact where films ‘defined shared cultural perceptions’ (ibid.). Hence, all of these types of impact, together with other indicators and indices used in the report, were based

on the same premise—that cultural impact cannot occur until after a film has been marketed (ibid.: 66). This is obviously a reasonable assumption since any change in the views or actions of a society should be predicated by a level of public awareness; but this logic did present certain challenges when determining which of the UKFC/BFI approaches were the most appropriate to this study since a low-budget film is always likely to have less impact on society than a film released with an advertising campaign that garners a high level of public awareness.

Although it is not the aim of this thesis to prove that low-budget films provided a certain level of cultural value compared to more expensive movies, it is part of the research aim to identify any cultural value generated by the sector. This is why an attempt was made to select measurements that would have been less likely to have been skewed by marketing campaigns that generate higher press coverage, ticket sales and audience awareness, by instead selecting measurements more applicable to films made with limited financial resources and a higher reliance of self-distribution. For example, a low-budget producer is more likely to be able to apply to a film festival than fund an advertising campaign, and thus, measures used in *Stories we tell ourselves: The Cultural Impact of UK 1946–2006* (UKFC 2009) such as film festival participation and contributions to more diversity in production are more applicable to the low-budget sector than are measures such as the number of mentions a movie received in the *Daily Telegraph* entertainment section. This does not mean that this thesis ignored the obvious correlation between the level of public awareness in a film and that film’s eventual level of impact on society; on the contrary, some of the same approaches used in the UKFC/BFI report that consider these factors have been used as will be explained presently. However, it should be noted that an attempt was made to use the most appropriate means to quantify the cultural value made by the low-budget sector—no matter how meagre the final result.

The cultural component of the more holistic approach presented herein incorporates several of the approaches used in the *Stories we tell ourselves: The Cultural Impact of UK 1946–2006* report (UKFC 2009). Specifically, this study also measures the location, genre and creative representation of films, but in terms of how changes in the supply chain during the digital revolution resulted in a more favourable public attitude and environment for production and enabled greater empowerment (Chapters Five and Six). It also includes direct quantitative measures of original impact based on box office revenue and distribution format levels as a means to estimate the level of public awareness (Chapters Six and Seven).

This thesis also includes estimates of extended impact based on festival participation, audience reach and contributions to diversity. For instance, though not as quantitatively definitive as the actual number of people who have purchased a theatre ticket, the number of accolades a movie has received is an indicator of extended impact used by the UKFC/BFI, and given that festival attendance is a marketing task that is generally available to all producers, it can be applied to the sector (Jones and Jolliffe 2006: 472).⁹⁷ One rationale for this view is based on the idea that festivals are basically cultural celebrations, and that the greater the recognition a film receives at these events, the greater the societal significance and contribution it makes to society. This measurement involves more than just a simple count of the nominations and awards a movie has obtained; it also involves a weighting of the industry prestige of the organisations awarding the accolades. This is because not all festivals are equal in prestige; for this reason, this study not only considers every accolade gained by each low-budget movie, but also investigates the sector's success at some of the world's most prestigious film festivals.

⁹⁷ In addition to the fact that *Stories we tell ourselves: The Cultural Impact of UK 1946–2006* report (UKFC 2009) also measure these movie characteristics to assess cultural benefits, James Leggott lists them in *Contemporary British Cinema: From Heritage to Horror* (2008: 5).

The audience reach measurement used in this thesis is based on the hypothesis that a movie's cultural impact on society can be approximated by measuring the level of public interaction it generated (UKFC 2009). In this case, the number and type of ratings and reviews posted on the IMDb and Rotten Tomatoes online databases were used to develop several different perspectives of audience reach. The first of these continues the focus on film festivals by comparing IMDb rating totals with premiere location data—an indicator of cultural benefit of films appearing in prestigious and non-prestigious festivals (UKFC 2009: 25). The second measurement gives an indication of social interaction based on IMDb and Rotten Tomatoes data, and measures whether the level of interaction changed during the digital revolution. Some consideration was paid during the research design phase to the possibility of aggregating such data for the entire British film industry, as a means of providing a comparative measure of social interaction with the rest of the industry, but this was not logistically feasible.

Several other quantifiable measures can be used to estimate the cultural impact of low-budget films that have also been used by the UKFC/BFI. In particular, by measuring the contributions made to British cinematic heritage by the creation of new narratives that explore and push the boundaries of class, gender identity, sexuality, race, cultural diversity and genre.⁹⁸ The movies selected for this measurement were chosen based on nominations and/or awards won at the festivals listed in Chapter Seven. A film that has been given such an accolade has been recognised as one that has also contributed to the heritage of cinema and, as a result, is deemed in this study as having made a cultural contribution. As in the criteria used by the UKFC/BFI in determining the movies they will support, productions that have explored new narratives touching on themes involving class, gender identity, sexuality, race, cultural diversity and

⁹⁸ Appendix D provides the list of IMDb genre categories and definitions used in this thesis.

genre are all viewed as enriching the heritage of British cinema, and in so doing making a cultural contribution. In addition to the merits of the movie itself, filmmakers who produced these productions and then went on to establish successful careers in the industry are included as they also made a tangible impact and contribution to the industry (Chapter Seven).

Finally, in addition to the hybrid set of approaches already described, this thesis also provides a survey of ‘notable productions’ from the census so that one further perspective on the cultural contribution made by the sector can be considered (Chapter Seven). Unlike most analysis contained herein, this examination is qualitative and based on an intuitive list of films derived from various discussions by academics, practitioner-authors, analysts and audiences. The rationale used to determine this list has been adopted from the way ‘culturally significant and representative’ British films were included in *Stories we tell ourselves: The Cultural Impact of UK 1946–2006* (UKFC 2009: 9). However, this approach cannot be considered above criticism since it is inherently biased in favour of the most ‘well-known’ movies and predicated on the hypothesis that British films do indeed make a ‘cultural impact’. The reason for using this approach herein is because, during the research conceptualisation stage, it was found to be the only one used previously to measure the cultural impact of British films using characteristics associated with *ars gratia artis* motives for production. In particular, the ‘changing face of Britain’, how ‘distinct identities for the nations and regions’ were created; how the ‘voice and image of minority ethnic communities’ evolved; and what level of ‘British audiences had access to British stories’ were all characteristics of cultural benefit that were measured (ibid.). In fact, after acknowledging ‘the divergent ways of assessing the effectiveness of the national cinema’, James Leggott uses the approach in *Contemporary British Cinema: From Heritage to Horror*, but in doing so he restricts most of his analysis to films theatrically released and

discussed by other academics (2008: 5).⁹⁹ Of course, the approach used to identify ‘notable productions’ in Chapter Seven will also be used to consider films deemed culturally significant by media academics and any other credible sources that have been included in the census.

2.6 Conclusions

This chapter has outlined the research design process and elements used to respond to the aim and questions posed in the last chapter. This account includes a description of the quantitative perspective and positivist epistemology adopted; the conceptualisation of a customised supply-chain framework for the structure of the research, including an applied use of the framework so that it could be used to identify potential data variables and if the planned research was viable from a quantitative measurement perspective; the reasons for using a producer view for many of the descriptive assessments, and for basing the premise for the thesis on a growth-from-innovation hypothesis; a detailed description of the total production census used, and some preliminary findings from the research method design process; and a presentation of the descriptive research approaches used, in particular the combined use of both an economic MEA estimate and certain cultural benefit assessments.

It was also noted that the data collection process itself was a considerable undertaking based on its complexity and the amount of sources and variables included; an effort that was separate from the more qualitative review presented in Chapter One and the economic and cultural analysis that will be presented in the next six chapters. Furthermore, at various points within this chapter, adjustments that had to be made during the research conceptualisation, design and data collection stages to ensure the thesis was more logistically feasible were noted, as well as

⁹⁹ Leggott describes this dilemma as ‘the divergent ways of assessing the effectiveness of the national cinema’ (2008: 5).

reasons why some perspectives, methods and approaches were not used. The chapter described the overall methodology and explained why a customised research design process was needed to ensure that the main research problem, questions and aim would be addressed.

3. PRODUCTION AND SECTOR-TO-INDUSTRY ESTIMATES

Before assessing the effects on the low-budget sector of the digital revolution, it is necessary to re-visit the applicability of manufacturing estimates published during that period. This re-appraisal is essential because earlier estimates were based on research that never defined the low-budget film in a consistent way or that studied non-bonded films. This is especially the case for the annual totals published by the BFIRSU. While appropriate for their aims, the Unit's approach omitted movies that are within the scope of this thesis; this included the omission of films previously unknown to the industry at large. As such, an accurate measure of the sector's contribution cannot be achieved without an accurate view of the production levels of the sector as it is defined in this thesis. This chapter will provide that understanding.

The chapter will begin with a discussion of the most rapid rise in production in the history of the UK film industry. This account will be followed by an audit that will include new and more inclusive manufacturing estimates for low-budget film and for national production. Given that these estimates have never before been published, and that they differ from all published estimates, the method used in their calculation will be given in detail. The chapter will then consider low-budget production from two perspectives, one showing year-to-year trends and the other by budget levels trends. Through these evaluations, insight will be gained into the ways in which the sector's output differed from that of the wider industry.

3.1 Periods of exceptional production during the twentieth century (analogue era)

Low-budget filmmaking has always existed in the British movie industry. A persistent lack of investment and producers' efforts to minimise their costs—forces that necessitate low-budget production—can be observed throughout the entire history of domestic moviemaking (Betts 1973: 316). This history entails three periods of exceptionally high levels of low-

budget production. The first of these was a ‘Short format period’ in the early 1900s, typified by Cecil Hepworth films such as *Alice in Wonderland* (1903) and *Rescued by Rover* (1905), and by Mitchell and Kenyon films such as *Cambridge University Sportsday* (1903) and *Tram Ride through Sunderland* (1904).¹⁰⁰ Films produced during this era were seldom more than ten minutes long, and were often shot with a single fixed camera; such films could be made for very little money and within the confines of existing technology. As cinema-going became a more popular pastime and as filmmaking based on celluloid technology advanced, the number of films made each year increased. Although exact numbers are now difficult to estimate, by the time of the First World War ‘thousands’ of those early films had been made by approximately a dozen production firms (Baillieu and Goodchild 2002: 9). Those short format films would not fall under the definition of a ‘low-budget film’ used for this study, since they are not feature-length in runtime and are often documentary in nature; nevertheless, this era does provide a basis for assessing later periods of exceptional growth.

The second period of growth is the ‘quota quickie period’, lasting from 1927 to 1938, which has already been mentioned in Chapter One in relation to the work of Chibnall (2007). This growth period occurred as a response to exhibition quotas set out in the *1927 Cinematograph Films Act*, which had been designed to stimulate the British film industry. Movies typical of this era, like *Stepping Stones* (1931) and *Department Store* (1935), were usually made for no more than £1 per foot of screened film, and ‘were often shot in a matter of days’ (Baillieu and Goodchild 2002: 38). Given that their average length was six thousand feet, the typical cost of a quota quickie was ‘around £6,000’ or, in current value, £400,000—the equivalent of a low-budget movie as defined herein (ibid.: 39).¹⁰¹ To put this into context, the cost of a

¹⁰⁰ For example, the once-popular film *Rescued by Rover* (1905) ran for seven minutes and cost £7 13s 9d, ~£800 in present-day value, when accounting for monetary inflation since 1905 (Baillieu and Goodchild 2002: 10).

¹⁰¹ Inflation-adjusted estimate based on inflation rates provided by <http://inflation.stephenmorley.org>.

Gainsborough and Gaumont film in the 1930s was ~£35k, whereas the US-backed *Goodbye, Mr. Chips* (1939) cost ~£225k (Baillieu and Goodchild 2002: 35).¹⁰² As exhibition quotas rose, so did output on a scale not seen since the short format period. By the end of 1938, annual production was >200 films per year, and the total floor space devoted to studios had reached ‘777,650 square feet’ (ibid.: 40). Involved in this boom were people like the director Michael Powell, the director, producer and screenwriter David Lean and the actress Vivien Leigh, who would all later achieve global acclaim (Sweet 2007). However, even though the *Cinematograph Films Act 1927* launched the careers of such artists and fuelled production, historians have not considered it a success since it led to many low-quality films (Chibnall 2007). Nevertheless, the rapid growth in production during this period offers another useful reference point, for two reasons. Firstly, it confirms that the government can be effective in fostering production. Secondly, the economic forces that dictated the direction of the market at that time—like Hollywood’s hegemony, the UK government’s involvement, and a rapidly evolving set of consumer tastes—would also all still be evident during the digital revolution. While it should be noted that many other macro-economic developments occurred after the quota quickie period that impacted the sector, what is clear is that, instead of new legislation or subsidies, during the first decade of this century, the rise in production would be primarily due to another, more powerful, economic force: the invention of digital technology.¹⁰³

3.2 Production during the digital revolution

The third period of increased production pertinent to low-budget movies was that which occurred during the digital revolution, from 2000 to 2012, and which is the focus of this thesis. This was a time of significant economic, social and technological upheaval for the

¹⁰² Exchange rate for 1939 provided by www.historicalstatistics.org/currencyconverter.html.

¹⁰³ For example, the role of second features until the 1960s, niche independent movements that started after the 1960s and the introduction of other state subsidies supported by the BFI, Arts Council, Channel Four and the franchised workshops. However, no evidence could be found that these developments significantly increased overall domestic production to the extent that occurred in the 1900s and 1930s.

global movie industry. The tragedy of the 9/11 attacks had an understandable impact on the stories told by the studios and an international financial crisis in 2008 reduced the availability of investment capital in the UK.¹⁰⁴ Traditional theatrical exhibition also came under renewed threat in the UK, on a level not seen since the advent of television with the arrival of internet-based entertainment alternatives, and in 2007 the Film Tax Relief (FTR) was introduced in part to limit tax fraud, a situation that also disrupted existing domestic investment models. However, despite these developments, the digital revolution had an impact on moviemaking that led to the biggest production expansion in the history of the British movie industry.

To understand the empirical evidence supporting this assertion, it is necessary to review the UKFC/BFI estimates published at the time. These indicate that during the digital revolution, the industry's output grew by 56% (from 80 films made in 2000, to 125 films made in 2012), at an average of 4% annually, with a total of 1,571 films made over the entire period (Figure 10).¹⁰⁵ In addition to the fact that these official totals still indicate a rise in production, they also portray an erratic year-to-year pattern that may have been the result of macroeconomic factors such as the repeal of Sections 48 and 42 tax relief that coincided with a rapid rise in output prior to 2003, and the 2008 financial crisis that coincided with a fall in output for that year and a relatively stagnant annual total during the remaining period (120 to 140 films). However, irrespective if certain PESTEL factors shaped this industry-wide trend or not, what is important to note is that these totals do not include a large number of low-budget movies.

¹⁰⁴ Post the 9/11 attacks, many productions were edited (*Spider-Man* 2002, *Zoolander* 2001), delayed (*Collateral Damage* 2002, *The Time Machine* 2002) or cancelled (*Nosebleed*, *True Lies II*) (*Screen Daily* 2002). Six major recessionary periods occurred in the UK over the last 100 years, the second most severe being the -7.1% in gross domestic product that occurred from 2008 to 2009 (*The Guardian* 2012).

¹⁰⁵ Secondary data obtained from the UKFC/BFI's *Statistical Yearbooks*, published annually.

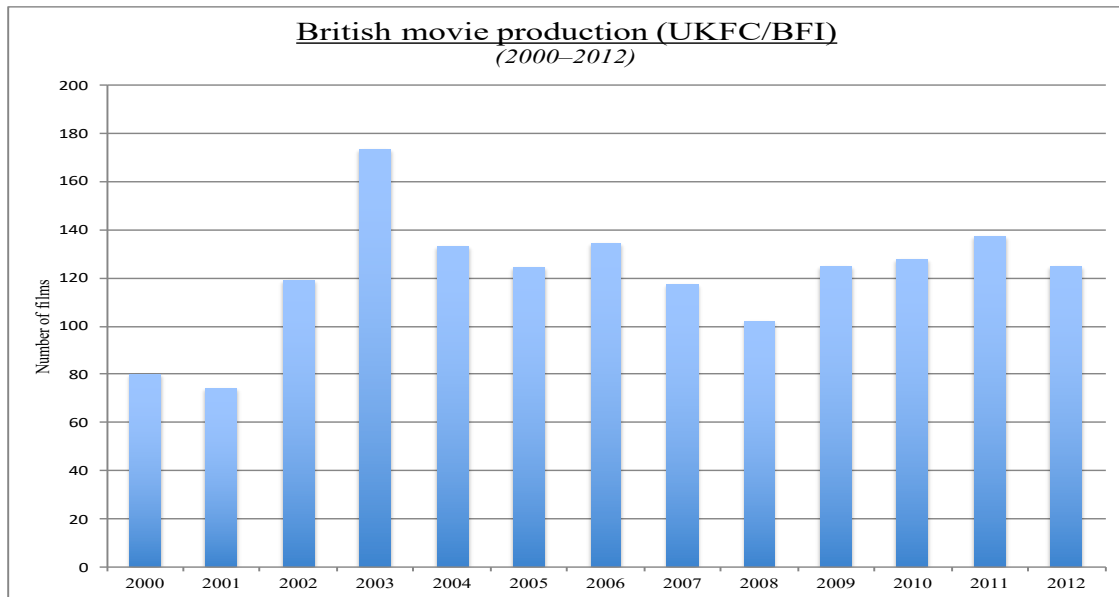


Figure 10 - British movie production (UKFC/BFI original estimates)

3.2.1 Low-budget film production

The contention that earlier published estimates of national film production did not accurately reflect actual production is supported by the data gathered (Chapter Two). Those totals show that the sector alone produced 1,552 films from 2000 to 2012 by increasing its annual output by 233% (60 films in 2000 to 200 films in 2012*), or ~11% per year (Figure 11).¹⁰⁶ While this increase was larger than any before it and, therefore, striking in its overall magnitude, it is also steady despite occurring during a period of considerable economic turmoil as seen in the UKFC/BFI's more erratic totals just discussed. However, before exploring the reasons for this rise in output, it must be explained why this new total is inconsistent with the official UKFC/BFI estimates (Figure 10). The anomaly is that their estimate of 1,571 likely includes only a small number of films surveyed in this thesis and included in the sector estimate of 1,552 films. To reconcile this difference the two methodologies used must be reconsidered.

¹⁰⁶ The estimate of 1,552 is the 'adjusted estimate' noted in Chapter Two and is based on the actual total of 1,451 films identified during the data gathering stage and a further 101 films added to the 2012* total made for less than half a million pounds each.

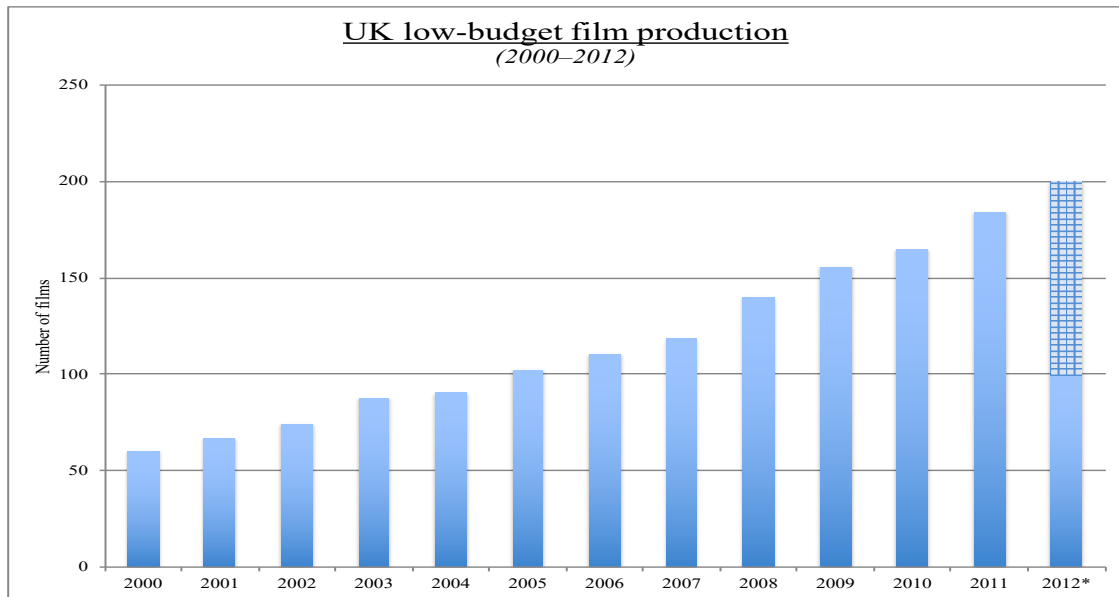


Figure 11 - UK low-budget film production

3.2.2 Methodological differences between data sources

There are three key differences between the methodological approaches used in the research conducted by the UKFC/BFI and in the secondary sources which provided the data for this thesis. The first difference relates to the conflicting ways in which the studies categorised the year when a film was made. While the UKFC/BFI always listed movies by the year when their principal photography was begun, the method used in this study involved classifying films according to the year in which their production was completed. Since the data collected indicated many low-budget films were started in one calendar year and completed in a later calendar year, it is conceivable that the UKFC/BFI might have categorised certain films as having been made a year earlier than the year under which those same films were listed for this study (Topping 2012). Besides this, it was also found during the data collection phase that movies were often announced to the market but never completed; thus, suggesting the possibility that the UKFC/BFI might have included in their

statistics films that were never finished and, as a result, the possibility of a larger discrepancy between the estimates.¹⁰⁷

The UKFC/BFI totals, however, are unlikely to have been inflated with unfinished projects. Every title included in the BFIRSU totals was checked by members of the unit to ensure that it had gained some type of exhibition (Topping 2012). In fact, for the £500k–£2.0m budget category—the only like-for-like classification used in both sets of research data throughout the entire period under analysis—the BFIRSU results are corroborated by the data gathered for this thesis, which provides a similar estimate for the number of films produced in that budget category, and which also included only completed films. There are still discrepancies between the two studies, especially after 2006 (Figure 12), but these can be attributed to issues that arose when relying solely on financial data that was extracted from sources that are ‘openly editable’ and that likely originated from producers reluctant to divulge the true financial details of their productions (Chapter Two; Simens 2003: 372). As indicated, efforts were made to minimise this issue, as well as the issue observed during the data collection stage that the more recent the title, the harder it was to obtain financial information on that title, it is unlikely that the widening discrepancy between the two studies of films made for between £500k and £2.0m in this instance affected the total adjusted estimate for low-budget output (Figure 12).¹⁰⁸ This comparison will again become relevant when the stability of the sector’s growth is explored, but it is important to point out now that both studies are in broad

¹⁰⁷ It is worth explaining in more detail what was highlighted in Chapter Two concerning the films discounted in the data gathering phase. Specifically, 17% of films were found not to be listed on IMDb as having been completed or as being linked to any other evidence that might suggest they had been made. There is also a more dubious aspect to this situation, for in 2013 five people were convicted on tax fraud and sentenced to 20 years in prison for claiming the FTC for a fictitious production. The phantom film project was called *Landscape of Lives* and was claimed to star Hollywood A-list actor Jeremy Irons. To cover their criminal activities, the convicted people shot a low-budget thriller that starred *Loose Women* host Andrea McLean and former *EastEnders* actor Marc Bannerman. The producers then retitled this substitute film *Landscape of Lives* and attempted to use it to carry out tax fraud (BBC 2013).

¹⁰⁸ As detailed in Chapter Two, films with no credible budget data have nevertheless been classified in this estimate as being in the low-budget category. The reason is that these films seemed likely to be low-budget when non-financial criteria were taken into consideration. For instance, productions with only first-time cast and crew, or which had been filmed solely with consumer-digital cameras and/or produced in a single location would have been judged as appropriate for inclusion in the low-budget class.

alignment despite this widening and that this methodological difference did not undermine the calculation of a more accurate set of adjusted estimates for total UK movie production.

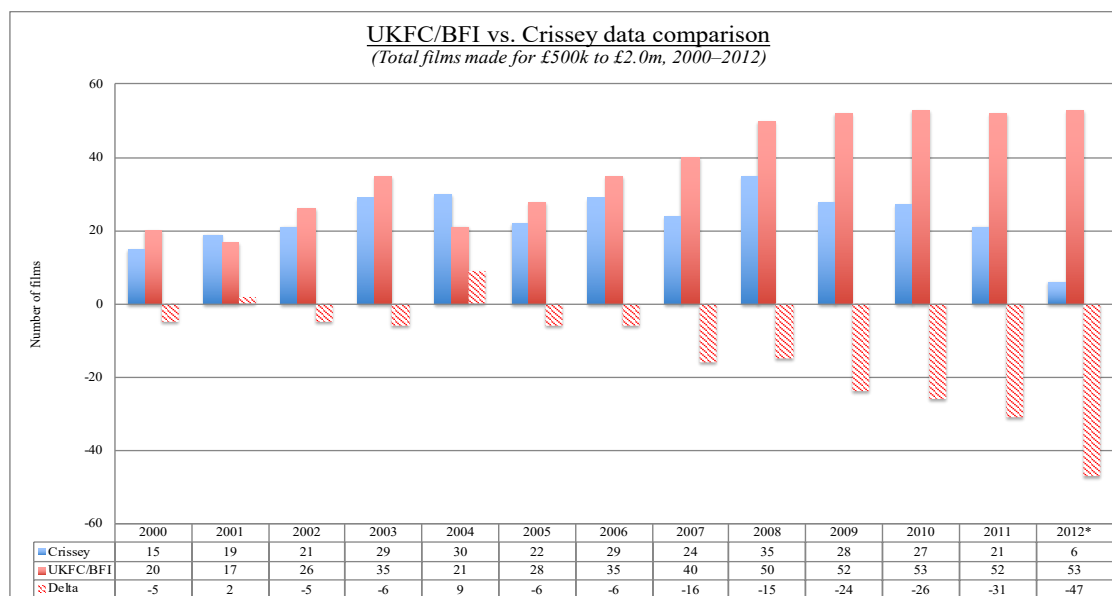


Figure 12 - Data source findings comparison for films made for £500k to £2.0m

The second methodological dissimilarity relates to the different sets of source material that the two studies used to verify data accuracy. The UKFC/BFI data had an advantage in this regard since it was not only based on the publicly available sources noted in Chapter Two, but it also had access to confidential financial information on projects for which lottery funding had been applied. Although the names of the films that received this money, and the amounts they were awarded, were in the public domain and were considered where possible, information concerning the actual production budgets (as distinct from the ‘promotional budgets’ reported by the press) was not available to the public. As a result, the UKFC/BFI is likely to have had access to more accurate data on movies that received soft-money support than was available for this thesis. However, as with the first methodological difference, the potential effect of having this advantage is also likely to be minimal, since only 47 of the 1,451 films identified in the census were recipients of lottery funding. In fact,

even if this finding was increased to 100 films, the discrepancy between the two estimates would be limited to ~5% of the data. In view of this exposure and of the knowledge that both studies agree on the total films made for £500k to £2.0m, this methodological difference can also be discounted since it does not prevent a more accurate estimate of UK production.

Although the first two methodological differences appear not to have been relevant in re-estimating the total number of films produced in the UK, the third difference presents a more serious obstacle. This difference concerns the choice whether to include or exclude certain categories of film. Since the sector could not possibly include more movies in 2012 than the entire UK industry (200 vs. 125 respectively), it is reasonable to conclude that the difference between the low-budget adjusted total of 1,552 and the UKFC/BFI total industry estimate of 1,571 likely resulted from the omission of certain types of film in the original UKFC/BFI estimates (Figures 10 and 11). To a large extent, the omission of certain kinds of low-budget films is indeed the main discrepancy, for unlike the criteria used herein, the UKFC/BFI excluded films made for \leq £500k in their annual output totals, for all years prior to 2010.¹⁰⁹ Though their decision to omit films in this important budget category was reversed in 2010, the UKFC/BFI still included documentary films of the sort that do not fall under the scope of this study. One way to estimate the effects of these differences would be to remove documentary titles from the UKFC/BFI totals and then add to these totals those films made for \leq £500k that were identified. Unfortunately, however, this is not possible, since the titles included in the UKFC/BFI's data were never published in their annual publications. This means that, when combining totals from the two different studies, the degree to which these methodological differences contribute to different results cannot be determined with a high

¹⁰⁹ The decision in 2000, to omit films made for \leq £500k, was logical since few films below this budget could be professionally made and distributed at that time. However, in 2010, this decision was reversed and in subsequent years the BFIRSU included films at all budget levels and attempted to adjust the original estimates back to the year 2003, a decision that will be discussed later in this section.

degree of certainty because there always is the risk that a small number of movies might inadvertently be counted more than once, categorised in a different year or omitted.

3.2.3 National film production

Since these methodological differences cannot be ignored, there are two approaches that can be used when attempting to obtain a more accurate view of the nation's production history and, consequently, to provide a better benchmark against which to assess the sector's total performance. The choice as to which approach is more accurate depends on the level of trust which one wishes to place in the data provided by the UKFC/BFI, as distinct from the research data. To provide a balanced view, both approaches will be presented in this section.

The first approach assumes that the data gathered for this thesis are more accurate and, when possible, it means replacing the original UKFC/BFI totals for films with budgets of <£2.0m with the totals obtained from secondary sources reviewed in Chapter Two. This approach is viable because the UKFC/BFI always used the £2.0m level as a defining threshold in its budget categories and was therefore always consistent on a year-to-year basis; in contrast their next highest budget level, £2.0m–£5.0m, a category that goes higher than the ≤£2.5m scope of this study and which therefore might include medium-budget films.

In the first approach, which places more emphasis on the secondary data listed in Chapter Two, the original UKFC/BFI estimate of the total number of films made between 2000 and 2012 is seen as having risen markedly from 1,571 to 2,563 films (Figure 13). This figure is arrived at by first augmenting the UKFC/BFI total by 911 films made for ≤£500k, and 563 films made for between £500k and £2.0m, these being the numbers given by the secondary data. That total is then reduced by the 482 films recorded in the original UKFC/BFI estimate

as having been made for between £500k and £2.0m.¹¹⁰ This first estimate not only suggests that the industry's total output may have been 63% higher than the original reports, but also shows how the discrepancy between the original and revised estimates widened each year up until 2010, when the UKFC/BFI began including films made for <£500k. For example, for films made for \geq £500k, in 2000 this total is 41% higher than the UKFC/BFI figure, but in 2012 this estimate is 118% higher than UKFC/BFI figure (Figure 13).¹¹¹ This widening discrepancy is one of the reasons why, in 2010, the UKFC/BFI began to include all movies, irrespective of budget level, in all its estimates. Unfortunately, despite the change, their 2013 totals could not be used for calculating this total, since there were still other methodological differences between the research that produced them, and the secondary data gathered for this thesis—a situation that will be considered again later in this section.

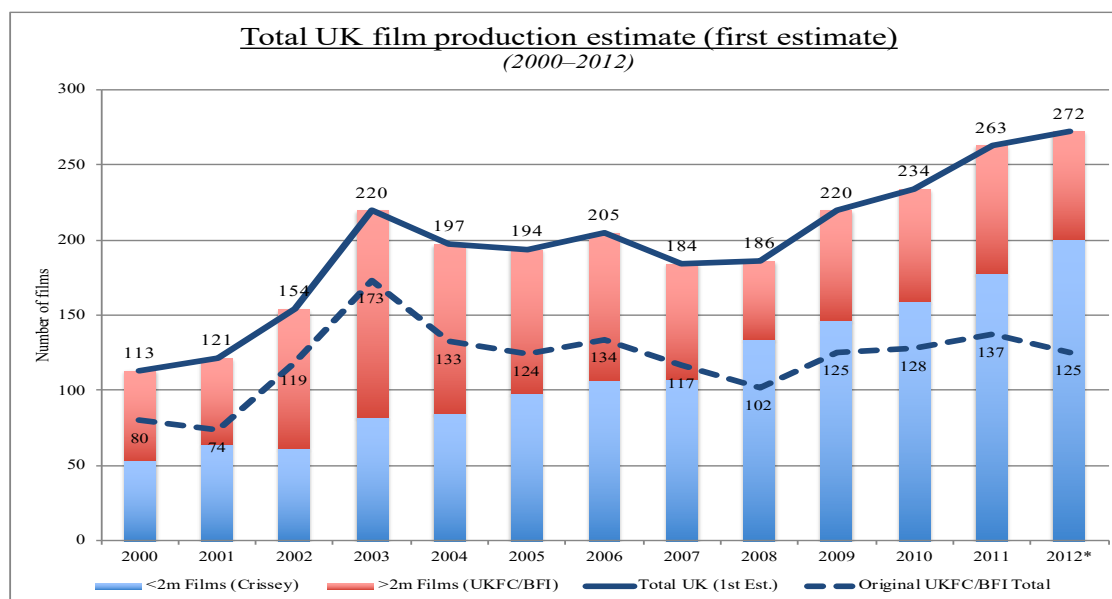


Figure 13 - Total UK film production (first estimate)

¹¹⁰ This estimate assumes that every film included in the UKFC/BFI estimate was also included in the secondary data sources.

¹¹¹ The 41% for 2000 has been calculated by comparing the change from the 80 films originally estimated by the UKFC/BFI with the revised estimate of 113 films in the Revised 1 estimate. A similar calculation has been conducted regarding the other two percentages.

The second approach places a higher reliance on the UKFC/BFI data than on the sources used for this thesis. When using this method, the only alteration that is made to the original UKFC/BFI estimates is the inclusion of feature films that were once excluded—those made for $\leq\pounds500k$. Using this approach, the calculation of the total number of films made over the period begins with the UKFC/BFI estimate of 1,571 and adds to this the 911 films produced for $\leq\pounds500k$, identified in the sources listed in Chapter Two, for an estimated total of 2,482 films produced (Figure 14). As with the first estimate, this method suggests that the original UKFC/BFI calculations underestimated the total level of UK film output; this method suggests that the real output was 58% higher than the UKFC/BFI estimate, whereas the first method suggests that it was 63% higher. This second method thus also supports the view that the difference between the original and revised totals widened year by year until, from 2010 onwards, the UKFC/BFI began to include films made for $\leq\pounds500k$ (Figure 14).¹¹²

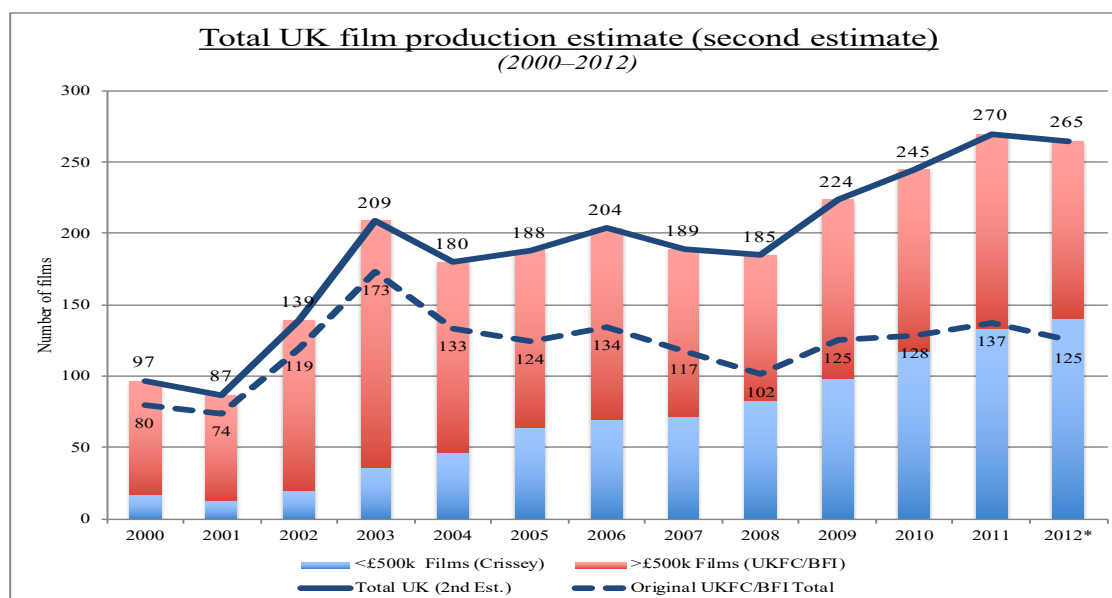


Figure 14 - Total UK film production (second estimate)

¹¹² The discrepancy for 2000 was 21%, for 2010 it was 91% and for 2012 it was 13% in relation to the revised UKFC/BFI estimates.

Regardless of which of these two estimates is used, they both offer new evidence that, in the first twelve years of this century, a higher level of domestic movie production occurred than was first reported or was achieved during the quota quickie period.¹¹³ Furthermore, the similarity between these estimates—2,563 for the first, and 2,433 for the second—suggests a high level of accuracy of the secondary data sources used in this study, since both estimates show similar results regarding the total number of films, the levels of annual output, the growth trajectory of that output and the total number of movies made during the period for £500k–£2.0m. Therefore, it is reasonable to conclude that the quality of the sources listed in Chapter Two is similar to that of the sources used by the UKFC/BFI and should be regarded as reliable enough to be adopted throughout this study (Figure 15).

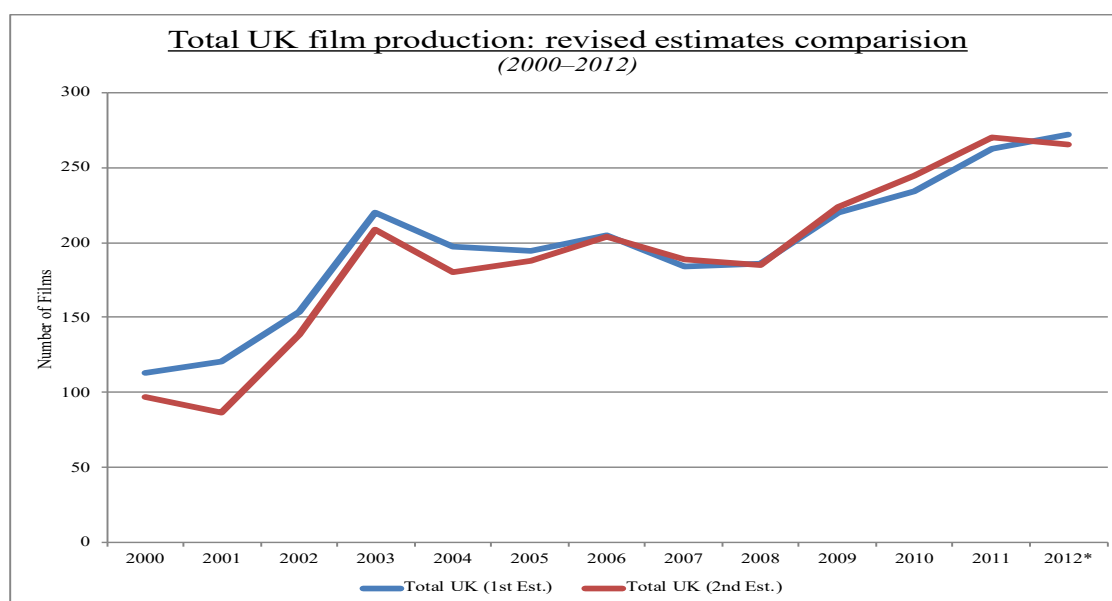


Figure 15 - Total UK film production: revised estimates comparison

These two new production estimates are also different from the revised 2013 totals published by the UKFC/BFI, which were numbers they themselves revised and is a fact which also

¹¹³ According to Chibnall, ‘supporting features >70 minutes’ grew by 113% (from 15 to 32 films) between 1928 and 1937 (2007: 13).

requires discussion. As noted by Baillieu and Goodchild, British production firms have often lacked the funds to carry out essential tasks (2002: xi). Marketing spend is a case in point since it is often the item of least priority to producers in cases when production costs overrun (Simens 2003: 329). From this perspective, this environment was a difficult one for the UKFC/BFI, for several reasons. Firstly, they often learned about the existence of a movie after it had been made (Topping 2012). For instance, they might have become aware of it from a festival screening, or when a BBFC classification had been given, or even after seeing it on YouTube. Thus, films with limited marketing resources were difficult for the BFIRSU's small team to identify (ibid.). Data problems also arose due to the way in which the UKFC/BFI categorised films in its yearly totals by the year in which their photography was begun. The problem was that the UKFC/BFI often learned of films several years after they had begun production and was often obligated to revise previous *Statistical Yearbook* totals so that they would include all previously unknown titles. The UKFC/BFI also started to become aware of the growing number of very low-budget films being made, until finally, in 2010, it decided to improve the accuracy of the yearly totals by including \leq £500k films. This was, of course, a recognition of the emerging importance of low-budget production at the time (ibid.; Chapter One), and in turn led to a more accurate view of UK production and a clearer focus on the low-budget sector. That decision, however, affected totals only after 2008, making long-term trend analyses more difficult to achieve. To adjust for this, in 2013 the BFIRSU also decided to include every film made after 2003, regardless of its budget.

Unfortunately, these revised BFIRSU 2013 estimates are not useful for the purposes of this thesis, for reasons best explained by comparing these estimates with the two new estimates just presented. One of the most obvious observations that can be made in this comparison is that there is similarity in all three revised estimates until 2007, after which the revised

2013 UKFC/BFI estimates become far higher, until they re-converge with the other two estimates in 2012 (Figure 16). This is a difference of 370 films over the period of divergence and is a large enough variance to require investigation. There are four possible explanations for this difference. The first is that the revised 2013 UKFC/BFI estimates also included documentary and animation films, whereas those are excluded from the scope of this thesis. Although precise numbers regarding genre are not available for the 2007–2012 divergence period, the BFIRSU does indicate that 109 documentary and animation films were made between 2010 and 2012, corresponding to an estimated 16.2% of all films made during that period (BFI 2013: 187). While this is consistent with other BFIRSU statements concerning a rise in documentary and animation films at the time, the 16.2% may be an overestimation when compared with its total output estimates. Even so, if it is assumed that 16.2% of all films produced in the 2007–2012 period were documentaries and animated films, then this would correspond to ~290 extra films, accounting for most of the 370-film difference.¹¹⁴

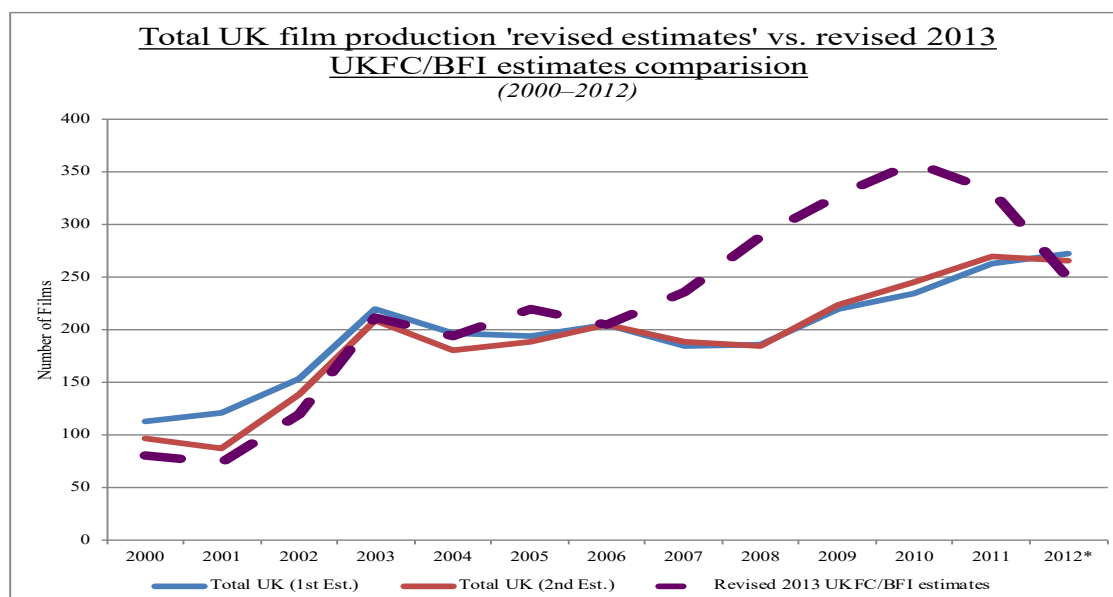


Figure 16 - UK film production: revised estimates vs. UKFC/BFI 2013 estimates

¹¹⁴ This estimate could be viewed as an overstatement since it was based on a total of 655 films made over the period. When the BFIRSU’s own revised 2013 production totals of 358 (2010), 331 (2011) and 249 (2012) are used (2013: 186), the total appears as 938 films.

A second possible factor accounting for the difference between the revised 2013 UKFC/BFI estimate and the two estimates provided in this study is that there might be titles that the BFIRSU considered to have commenced filming but that were never completed. However, the number of these films is unlikely to be high, due to the similarity of the BFIRSU total, and the two new estimates for films made for between £500k and £2.0m. A third possible reason for the divergence is the possibility that the UKFC/BFI revised its earlier published estimates to a higher number, by adding films made for >£2.0m. This possibility cannot be confirmed, but it is a possibility that could help explain the remaining difference of 80 films (5% of the total during that period) between the estimates. Finally, the fourth factor is the possibility that during the data gathering phase, some films produced by the sector might have been overlooked. This is clearly a possibility but, since the remaining difference, after taking the other three factors into account, is only ~5% of the overall total of films made during that period, it is more prudent to use the more conservative estimates shown in this thesis to form the benchmark for comparing the production performance in the sector.

When all these factors are considered together, based on both revised estimates provided in this study, and ignoring the revised 2013 UKFC/BFI estimates, the domestic film industry can be seen to have made ~2,500 feature-length movies over a twelve-year period. This estimate is ~60% higher than the published BFIRSU totals, but is still consistent with its more recent estimates (excluding documentaries and animation). This was a growth in output of ~150%, but still appears to have been somewhat sensitive to changes in government policy and to the broader economy. Since the data used to create these new estimates have been shown to be reconcilable with the previously published UKFC/BFI totals, once the differences in methodology and scope have been taken into account, they can be used with a high level of confidence to make observations in this study.

3.2.4 Position of low-budget film production to national film production

These estimates not only provide an altogether new perspective on UK movie production during the first decade of this century, but also highlights more accurately the growing prevalence of the low-budget feature-length film sector. This can be observed by plotting the yearly low-budget production numbers (Figure 11) over the revised estimates for total production which were discussed in the previous section of this chapter (Figure 15); except for the boom years between 2003 and 2005, the low-budget sector can be clearly seen to have underpinned the rest of the nation's film production output (Figure 17). Therefore, while the rest of the domestic industry was experiencing more modest levels of growth, or even stagnation or decline, possibly due to the macroeconomic changes occurring during this period, low-budget filmmaking was being undertaken at a rapid and steady pace in a way that resulted in overall growth in the British movie industry's manufacturing output.

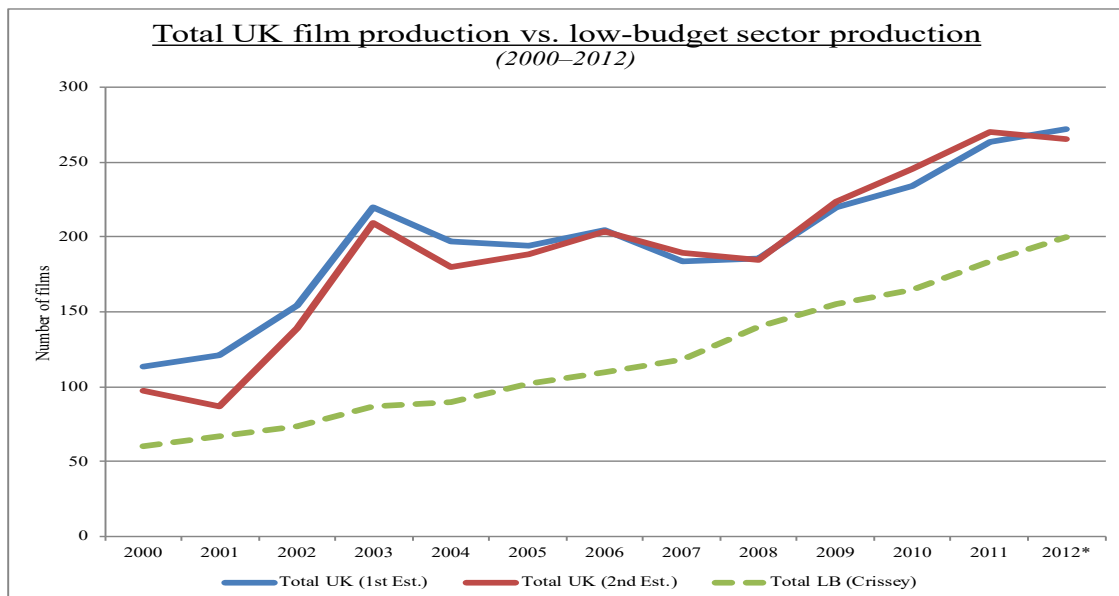


Figure 17 - Total revised UK film production vs. low-budget film production

The growing role of low-budget movies in national film production can also be observed from a domestic market-share perspective. This is because the low-budget sector accounted

for ~59%–61% of all films produced during the period (Table 12), with its share of total production increasing over the period to the point where it was producing roughly two-thirds of all the films made annually. This is in contrast to the 1990s, when the ‘nature of films’ changed, and the country accumulated a more evenly balanced portfolio of budgeted films (Baillieu and Goodchild 2002: 127–129). Yet, despite this legacy, it was clear by 2012 that the nation’s annual manufacturing total was totally underpinned by the production of low-budget feature films.

LOW-BUDGET FILM PRODUCTION VS INDUSTRY ESTIMATES														
<i>(2000-2012*)</i>														
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012*	Total
Revised Estimate 1	53%	55%	48%	40%	46%	53%	54%	64%	75%	70%	71%	70%	74%	61%
Revised Estimate 2	55%	74%	44%	39%	47%	52%	52%	57%	72%	66%	65%	66%	75%	59%

Table 12 - Low-budget film production compared to revised industry estimates

The growth in low-budget production, however, was not equally distributed across all budget ranges within the sector. Earlier it was noted that national production, as first defined by the UKFC/BFI, had experienced erratic expansions and contractions that resulted in overall growth (Figure 10). The trends that were evident in these original totals tended to originate from the films made for between £500k and £2.0m. As such, these estimates indicated that the lower the budget, the higher and more stable the growth in the annual production rate. Furthermore, this finding not only holds true when one is looking at the entire industry but also when viewing output growth solely within the low-budget sector; it is the lowest-budget films whose production contributed the most to the growth in output. This phenomenon was already alluded to in the revised first estimate (Figure 13). The growth in the industry was not driven uniformly by the sector as a whole, but rather from films made for ≤£500k (Figure 14). In fact, the growth rate for films made for ≤£500k became so strong that they increased faster than films made in all higher budget categories combined (Figure 18). Not only was

the growth in production fuelled by the low-budget sector; the sector's growth itself was fuelled by the growth in films made for $\leq\pounds 500\text{k}$. This observation lends credence to the old heuristic view that the 'lower the cost the higher the volume', an economic principle that has been applied to other industries (Samuelson and Nordhaus 2010: 83). The revelation that this phenomenon also occurred in the specific case of the British movie industry is therefore of little academic significance; usefully, however, it provides new understanding of the reasons for this rapid growth in low and very low-budget films, as will be explored later.

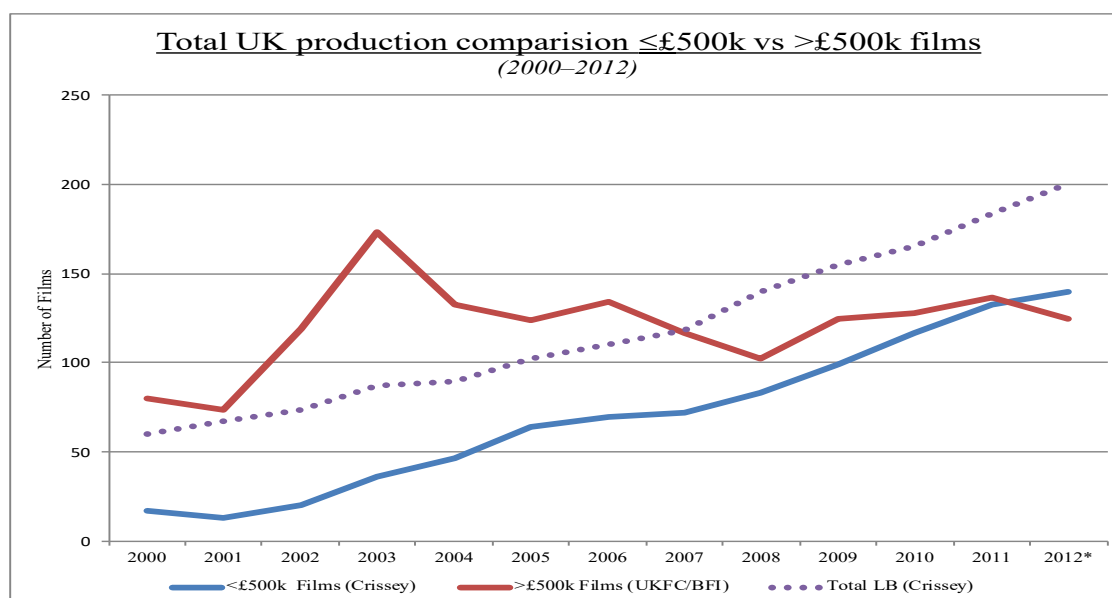


Figure 18 - Production comparison $\leq\pounds 500\text{k}$ and $>\pounds 500\text{k}$ films

3.3 Annual production rates

Arguably, a production increase of 233% would be considered impressive by any standard, but the rise in low-budget filmmaking is even more striking when one considers that it was achieved with steady, year-on-year growth, at a time when the rest of the domestic movie industry was enduring fluctuations in overall production. This success is evident when the peaks (2003 and 2009) and troughs (2007 and 2010) in the original UKFC/BFI estimates for the total industry are contrasted with the more gradual and consistent rises achieved by the

sector (Figures 10 and 11). Unfortunately, with all the methodological differences between this study and those of the UKFC/BFI, and with the limitations already noted, this visual comparison is not a reliable way to compare the stability of the growth of the low-budget sector with that of the rest of the industry. A better statistical measurement of the difference between the volatility of the two growth trends can be accomplished by comparing the standard deviations of their yearly growth percentages (σ). In this case, the σ assesses the degree of variation of a curve's yearly growth rate (Hand 2008: 38); the higher the yearly production curve's σ , then, the more volatile the growth, and the riskier the industry. For the BFIRSU's revised 2013 totals for the entire industry, the σ in growth rate was 29%, while for the sector, using the data gathered for this study, the σ in growth rate was only 4%.¹¹⁵ This quantifies the claim that the output of the sector was more stable than that of the rest of the industry during the time (Figure 10): since, in terms of standard deviation growth rates, the growth in the sector was only one seventh as volatile as that of the rest of the industry.

On many intuitive grounds, the idea of a more stable low-budget sector seems to defy basic economic logic. Nothing would lead one to expect stability in a sector that is characterised by the peculiarities noted in Chapter One and hundreds of under-capitalised, 'single-purpose companies' (Branston and Stafford 2006: 439). Indeed, of the relatively small number of firms in the British motion-picture industry that have made and had distributed over five films, few can claim to have had even occasional involvement in the making of films with budgets \leq £2.5m.¹¹⁶ During the years covered by this study, the more stable and established

¹¹⁵ The following average growth numbers were used to calculate the σ on the BFI's revised 2013 estimates: 2000 (-13%), 2001 (-8%), 2002 (61%), 2003 (78%), 2004 (-8%), 2005 (13%), 2006 (-6%), 2007 (15%), 2008 (22%), 2009 (13%), 2010 (9%), 2011 (-8%) and 2012 (-25%). This equates with an average yearly growth rate of 11% and a σ of 29%. Similarly, the following average growth numbers were used to calculate the σ for the low-budget sector: 2000 (11%), 2001 (12%), 2002 (10%), 2003 (18%), 2004 (3%), 2005 (13%), 2006 (8%), 2007 (7%), 2008 (19%), 2009 (11%), 2010 (6%), 2011 (12%) and 2012 (9%). This equates with an average yearly growth rate of 11% and a σ of 4%. This being so, the σ for the low-budget sector (4%) is only one-seventh the size of the σ for the total industry (29%).

¹¹⁶ Aside from the PSBs, the most obvious private-sector exception to this trend is Working Title Pictures which under their WT2 subsidiary produced *My Little Eye* (2002), *Inside I'm Dancing* (2004) and *Gone* (2007). Other firms, including Carnaby International, Vertigo Films, the now dormant Spice Factory and the now bankrupt Revolver Entertainment, can also be viewed as exceptions.

manufacturing firms remained firmly rooted in the higher budget sectors, yet most of the films produced were produced for very low budgets. Despite its neglect by large firms, low-budget film production nevertheless continued to rise, and in a way that was not destabilised by the same economic forces that had driven fluctuations in medium-to-large-budget production (Figure 19). This does not suggest that the economic forces did not affect films produced within the sector at all. Indeed, since both the UKFC/BFI estimates, and the estimates used in this study, yield similar totals for films made for between £500k and £2.0m, it is plausible that many films within this range were also affected (Figure 12). Evidence for this possibility—that non-technological PESTEL factors discussed in Chapter Two—might have influenced production can be found when comparing the UKFC/BFI’s production data for >£500k films for different years. These show turbulent peaks (booms) and troughs (busts) in annual levels, in contrast with the more stable growth evident in the data gathered for this thesis on films made for ≤£500k (Figures 12 and 18). This suggests that a more likely ‘lower budget threshold’ at which the effects of these macroeconomic forces start to dissipate, is at least the ~£500k level or below, and could be present for all non-bonded films.

This conclusion can also be supported by further dividing the total number of low-budget films made each year into more detailed budget-level subgroups since it offers a different perspective on the underlying importance of non-bonded films made for ≤£500k (Figures 11 and 19). This breakdown of the low-budget sector’s annual output achievement still shows an average annual growth rate of 11%, with a standard deviation of 4%, at the total level, with none of the volatility seen in the UKFC/BFI data. However, the data also show how the production trend for films made for ≤£500k is different from that for more expensive low-budget categories. Just as when an adjustment was made earlier in this chapter, for the discrepancy between the BFIRSU data and the data gathered for this study, non-bonded films

made for $\leq\text{£}500\text{k}$ are seen to form the largest sub-group within the sector, and to have an average growth rate of 23% per year, the highest in the sector (although this sub-group also had more erratic growth than did the low-budget sector as a whole, with a standard deviation in growth rates of 23%). This being so, the growth in films made for $\leq\text{£}500\text{k}$ again appears to have driven much of the expansion of the low-budget sector and, as a result, the entire domestic industry's overall production level. Nevertheless, the σ of 23% for this low-end part of the low-budget sector appears to be inconsistent with the overall sector's more stable σ of 4%. To understand this anomaly, it is necessary to revisit the data on low-budget films whose exact budget could not be verified.

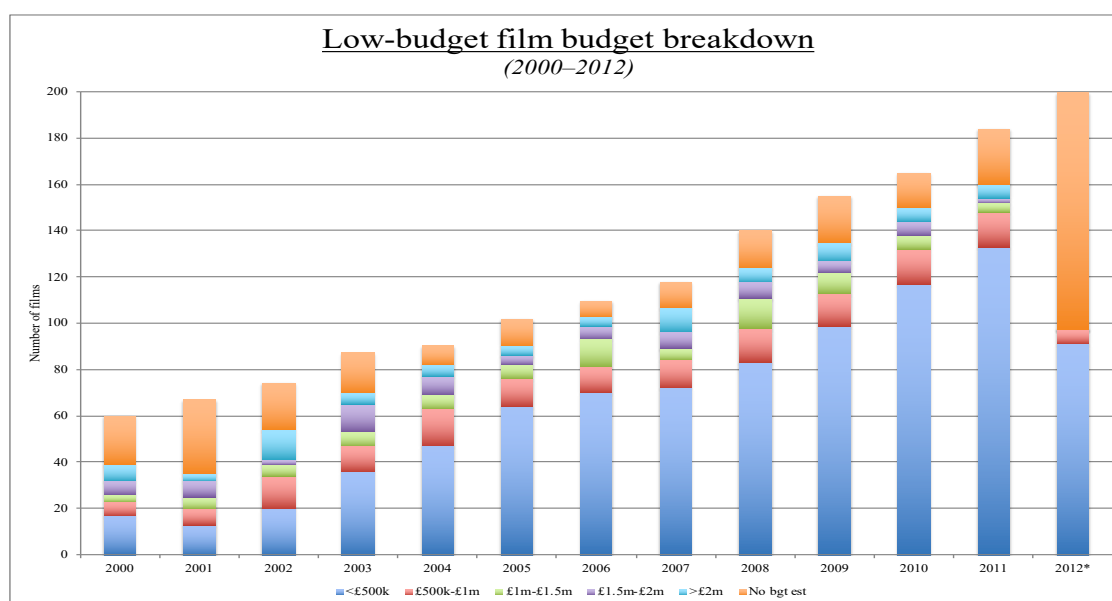


Figure 19 - Low-budget film sector production breakdown

As can be observed in the budget breakdown for the low-budget sector, the higher σ of 23% for films made for $\leq\text{£}500\text{k}$ likely arose from fluctuations in the average year-to-year levels (Figure 18). Yet, while this was occurring, especially in 2001, low-budget films with no verifiable budget (which were nevertheless assumed to be low-budget due to other characteristics) began to counterbalance the maintenance of a stable overall growth rate at

the total production level. This is why films made for $\leq\pounds 500\text{k}$ could still have a higher σ of 23% while the overall sector had a lower 4% σ . Although it has already been explained in Chapter Two why low-budget films with no verifiable budget were included in this thesis, it is still helpful to restate here that these films exhibited enough product traits that strongly suggested they were made for $\leq\pounds 2.5\text{m}$ and, for that reason, they were included.¹¹⁷

It is also likely that a high percentage of these films with no verifiable budget could have been made for $\leq\pounds 500\text{k}$. As will be shown in Chapter Six, most the films fell into this sub-category and if films with no verifiable budget estimate were apportioned across the four budget categories based on this finding, the σ for films made for $\leq\pounds 500\text{k}$ would probably be much closer to the 4% for the entire low-budget film sector. It is true that, compared to the production of the overall sector, the performance of films made for $\leq\pounds 500\text{k}$ has both a higher average growth rate (23% instead of 11%) and a standard deviation in growth rates (23% instead of 4%). Nevertheless, the yearly production curve for this budget-category in this representation still lacks the peaks and troughs that are found in the BFIRSU data. Aside from confirming the heuristic rule of thumb that ‘less cost equals more volume’, this data is consistent with the possibility that the PESTEL forces that likely affected medium-to-large-budget films were largely inconsequential for low-budget production during the period, and that the making of very low-budget films—at least in terms of number of films produced—was not only fuelling the growth of the low-budget sector but also of the entire industry.

3.4 Conclusions

The purpose of this chapter was to contextualise the sector’s contribution to the British film industry by offering a new set of estimates for production during the digital revolution. This

¹¹⁷ Excluding the 101 unidentified films added in the 2012 total for the production estimate (Chapter Two).

manufacturing output audit was necessary since previous estimates had not included all the types of low-budget films made during this period as defined in the scope of this thesis. The chapter accomplished this aim by providing new production estimates for the low-budget sector and for the overall industry, as well as a budget-subcategory breakdown of the sector estimate. The chapter began by describing earlier manufacturing booms in the twentieth century, thus providing a historical benchmark against which to compare the new estimates. These new production estimates indicated that the sector alone made an adjusted estimate of 1,552 films between 2000 and 2012*, increasing its annual output by a little under 11% per year on average for an overall growth of 233% over the entire period (Figure 11). Since this rate was almost as high as previous published estimates and the need to counter the absurd view that only 19 medium or high-budget films had been produced during the digital revolution, a new estimate was also needed for the total UK film production. Two different approaches were then used to derive two new estimates. These estimates were similar in magnitude to each other and suggested that the domestic industry made ~2,500 movies over the period. Since this assessment was higher than published totals, the research process and the data used in the calculation of the estimates were described in detail. It was concluded that the accuracy of these estimates is comparable to that of the previous estimates, with differences between them occurring due to difference in methodology and scope.

Overall, it is evident from the trends presented in this chapter that the British motion-picture industry during the early years of the digital revolution underwent the biggest manufacturing expansion in its history. This was despite its facing severe macroeconomic challenges, and despite, going by the production estimates published at the time, its being an industry that was largely unaware that output was expanding to this level. However, the total industry growth rate of 150% was not equally distributed throughout all the production sectors; this

chapter identified various differences between the rise experienced by the sector and that experienced by the rest of the industry. For instance, the growth over the entire 2000–2012 period was 233% for low-budget production, but only 20% for medium-to-high-budget films. This trend alone resulted in a steep rise in the share of production for the sector, to the point where by 2012, it was producing roughly two-thirds of all the films made annually. This was in stark contrast to the circumstances in the late nineties, when domestic production was more evenly distributed across budget categories. It also differed markedly from the output trend for the rest of the industry.

Therefore, a growth in low-budget filmmaking was the cause of an unprecedented increase in overall production. What is perhaps even more remarkable, however, is the way in which growth occurred. Two key observations were discussed concerning the sector. The first was that this growth was primarily driven by growth in the production of non-bonded films made for \leq £500k. Thus, not only was national production being fuelled by the low-budget sector, but the growth of the sector itself was being supported by the growth of its lowest-budget subcategory. Evidence was also presented that year-to-year growth of low-budget films was a remarkably stable, although, surprisingly, growth of the lowest budget \leq £500k was not as stable as the growth of low-budget films overall. This was quantified in terms of the sectors' standard deviations in growth rates. Both of the new estimates for overall domestic movie production supported the view that manufacturing of more expensive movies was impacted more by macroeconomic forces than was the production of low-budget films.

4. THE SUPPLY CHAIN: TOOLS, TASKS & THE DIGITAL REVOLUTION

While it was clear from the quantitative analysis presented in Chapter Three that British low-budget production grew at an unprecedented rate over the 2000–2012 period, it remains to investigate the causes of growth. Factors affecting production often come from the external environment, and their examination can put into context the contribution of an industry by offering reasons for how economic output was achieved and how the market might continue to be shaped in the future (Johnson et al. 2013: 42). In Chapter One it was noted that new technology was one of the most obvious external factors during that time, causing social and economic changes that led to a far-ranging debate among film industry stakeholders. While some of this discourse did consider aspects related to the low-budget sector, it did not include much discussion on other external factors and their impact on low-budget filmmaking. The reasons for this situation, particularly the lack of change in other PESTEL factors and why this stability helps support a growth-from-technology hypothesis, have already been detailed in Chapter Two, but the likelihood that the production trends detailed in Chapter Three can be largely explained by the arrival and use of digital technology can also be supported by an understanding of some of the ways digital technology transformed the supply chain process.

The aim of this chapter is to offer empirical correlational evidence supporting such a link, and to provide the context for observations of the supply chain process which will be detailed in the next three chapters. This contextualisation will be based on an appraisal of certain tools used in filmmaking for image capture, pre-visualisation, non-linear editing, e-distribution and exhibition, and of how the development of these tools and associated sub-processes offered new benefits to low-budget film producers. In exploring these concepts, this chapter will detail the sector's extraordinary transition from analogue to digital image-capture formats, illustrating the impact of the digital revolution briefly described in Chapter

One. This will then be followed by a set of assessments of the role played by innovations in camera, software and distribution tools in fostering the move to digital technology formats, and an argument that their acceptance during a period of unprecedented growth supports a growth-from-innovation hypothesis.

4.1 The transition from analogue to digital image-capture formats

One of the trends that provides the strongest support for a growth-from-innovation theory is the sector's rapid adoption of digital cameras and the coincidence of this adoption with the rise in production. The popularity of these digital cameras had a precedent in the introduction and adoption in the early 1980s of inexpensive analogue-tape camcorders.¹¹⁸ The arrival of these tools, such as the Sony BMC-100P and the JVC GR-C1, ushered in a new breed of budget-conscious filmmaker who would begin to demand increasingly higher levels of picture and sound quality, along with ease of use and affordability (McGill 1989). By the late 1990s, however, the demands of these filmmakers were still not being satisfied, so camcorder manufacturers responded by introducing a plethora of new prosumer digital cameras. These more advanced devices, some of which used the Digital8 and MiniDV tape formats, offered levels of quality and control that had never before been available to low-budget producers, and quickly became the de facto tool of choice for their cinematographers. Indeed, this move was already underway by the turn of the millennium, since digital cameras had already gained an 11% market share of the sector's production. Even more notably, by

¹¹⁸ With the advent in the 1980s of consumer VHS and Betamax cameras, a new product was created to cater for the novice filmmaker. Not only were these cameras affordable to the budget-conscious consumer, but they also had five major advantages over earlier analogue cameras. First, in conjunction with the arrival of new post-production software, they offered the user immediate image processing, which eliminated the need for the costly film-lab developing required by analogue cameras. Second, they offered an improvement in picture quality over 8mm, the only other inexpensive format at the time. Third, they had in-built sound recording and synchronizing capacities, again an advantage over earlier formats. Fourth, they were portable in size and weight, and had their own power supply that could handle remote recording sessions. Finally, they all used a standard tape format that was widely accepted, could be plugged into TV sets for immediate playback and made self-distribution more feasible. Though it would be another fifteen years before similar simplicity in the editing process and advancements in picture quality were achieved (new lenses and image capture), these early cameras would pave the way for a new generation of producers who would not have to conform to the Hollywood method of moviemaking, but could instead use a 'camcorder' that was both a camera and a video recorder (Sony for Betamax and later Panasonic/JVC for VHS) to tell their stories.

2012 this share had risen to 90% and made the digital camera's dominance over analogue cameras complete (Figure 20). This finding helps substantiate the decision to define the digital revolution as the years from 2000 to 2012 as this more measured discovery indicates that the transition by the low-budget sector to a supply chain based on digital technology was largely completed during this period. Moreover, this trend typifies a rapidly shortening product life cycle since it did not end with the demise of analogue cameras alone, but digital technology itself would undergo its own transformation (Kotler et al. 2012: 558).

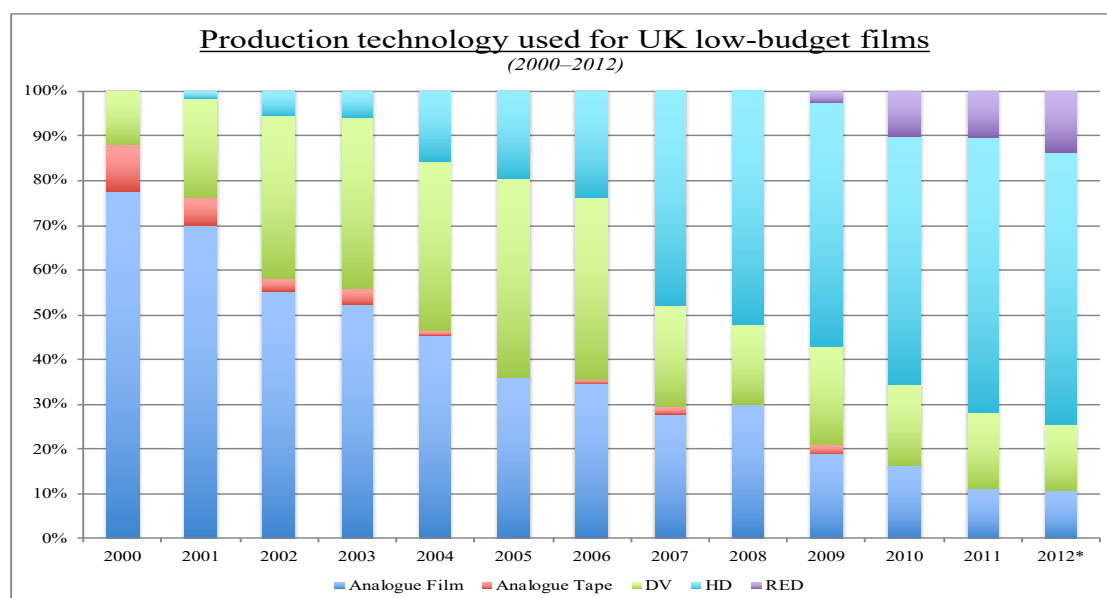


Figure 20 - Production technology used for UK low-budget films

As fast as new digital image-capture technologies were being introduced, they were being replaced by even newer and more advanced digital technologies.¹¹⁹ The first observable case of this trend is the way early digital camera formats became obsolete as High-Definition (HD) formats began to enter the market. This occurred between the years 2000 and 2005,

¹¹⁹ The early digital camcorders that replaced 16mm and 35mm analogue cameras provided higher picture and sound quality by comparison with their earlier competitors. However, their 5:1 compression rate, limited colour space and limited variety of lenses soon gave way to HD formats that utilized 2k and 1080 interlaced technologies that could mimic 35mm quality at an affordable price.

when the digital-video format increased its market share from 11% to 42%; as this growth was taking place, HD cameras were increasing their market share at the expense both of analogue-film and of other digital-video devices (Figure 20).¹²⁰ This change started inconspicuously, early in the decade, when only a few low-budget cinematographers could access HD technology due to its high cost, but by 2011 the format was being used to make 59% of all films (Figure 20). However, even then, the migration to the latest image-capture digital formats did not end with the ascendancy of the HD format, but rather intensified.

Just as with the demise of the analogue format before it, the HD camera was already losing its dominant position by the end of the decade as still more advanced formats became affordable. The success of these new ‘higher-than-1080’ digital cameras was spearheaded in 2008 with the introduction of the RED camera, which would take only three years to attain a 10% market share; however, by 2010, camera manufactures, including Sony, Panasonic, and even analogue-stalwart ARRI, were collectively introducing, on average, over twenty higher-than-1080 cameras a year. This confirms that the only certainty at that time was that all existing formats would eventually be usurped by more advanced formats. This dynamic and chaotic pace of innovation was not, however, confined to recording an image.

4.2 Camera technologies

While the rapid changes that took place in output, in cost levels and in the use of digital camera technology all occurred around the same time, this fact does not by itself prove the growth-from-innovation hypothesis. When the situation is viewed more sceptically, there are other plausible PESTEL explanations for the rapid moves in trajectory evident in the rise

¹²⁰ This rather linear set of trends, from a social history of technology perspective, is contrary to the views of Pinch and Bijker since they argue that technological innovation is neither a linear nor simple process, but instead ‘multidimensional’ (1989: 29). When accepting this view, these findings indicate a higher level of innovation across the entire supply chain process.

in production (Johnson et al. 2013: 42). As noted in Chapter Two, it is unlikely that the trends detailed in Chapter Three could be explained by any changes in government policy or by a rise in the national population, or that the trends arose by coincidence; and for that reason it is still important to look at correlational evidence. To support the theory of a causal link between technological innovation and productivity, it is necessary to consider the physical characteristics of the digital camera itself. Unlike their celluloid-based forebears, which captured images onto film with chemical reactions responding to impinging light, the digital cameras used components such as sensors, software, microprocessors, flash storage and satellite data to capture light waves and transform them into electronic files (.mpeg and .mov files). With product components like these, digital cameras had as much in common with computers as with their analogue-based ancestors.

These shared product characteristics suggest the digital camera manufacturing industry can be studied from some of the same perspectives used to analyse the computer industry; most prominently, they suggest the relevance of Moore's Law (Chapter Two). When this theory is used, there are four 'Mooresque' elements that become useful for analysing the low-budget supply chain.¹²¹ The first is the rising quality of image-capture technology (sensors, processor speed and number of pixels); the second is innovation related to the physical design of the camera (size, lens variety, memory capacity and battery-life); the third element is the pace of innovation; and the fourth is the lower costs that typically result from these advancements.¹²² As in the realm of computers, the first three elements are important when it comes to assessing their impact, and are often already interconnected when introduced to

¹²¹ The term 'Mooresque' is used in this thesis to describe technological innovations in moviemaking tools that result in more improved price-quality ratios and that occur on at least a biennial basis.

¹²² Although there is little debate regarding a camera's electronic components (processor speed and memory), there is a problem with applying Moore's Law to the physical diffraction limit of the lens since 'the diffraction limit ... is larger than the pixel size on some sensors'; thus, cramming more or smaller pixels on a chip will 'not result in a higher resolution image' (Maxwell 2009: 55).

the market since they can manifest themselves in single product upgrades. For instance, the Canon XL1, the Sony PMW-EX3 and the RED ONE NAB were replaced with major model upgrades on average every 14 months after first being introduced, a rate of market introduction comparable to the consumer electronics industry, but slower than the 11 month average by Apple for their iMac computer after it was introduced in 1998 (Apple 2015).

Whereas secondary research is available for other products (Maxwell 2009), there are only a few online sources that have related these Mooresque elements to the economics of digital cameras. This limits the amount of analysis that can be done without conducting primary research. Furthermore, the relatively few sources that do exist also lack academic credibility; most are camera-enthusiast blog-websites, where authors are listed under aliases and their analyses are presented on opinion forums. That being stated, these online sources were developed by enthusiasts, and for this reason they should be viewed as sources of information on consumer opinion. These websites' users discuss in detail the merits and costs associated with the Mooresque elements, and also speculate on the possible effects they might have on consumers (Maxwell 2009; Sandstrom 2009; Videomaker 2011).

Although the discourse on these sites has always been somewhat structureless, it can be grouped into two broad themes: the utility of breakthroughs in new technology (frame rate, lenses, batteries and processor capacity) and the costs and benefits these innovations presented to low-budget cinematographers (Videomaker 2011).¹²³ Although the specifics of these users' discussions are not insightful, their existence does suggest that a qualitative link may exist between innovation and production, via consumer demand. In particular, the

¹²³ In addition to sources already referenced, consumer electronics websites www.which.co.uk and www.amateurphotographer.co.uk also presented similar commentary.

better a product is at satisfying a consumer's needs the more attractive it will be to that consumer, and the lower the price is for that product the more likely it is to be purchased (Kotler et al. 2012: 127). It is therefore reasonable to suppose that the four Mooresque elements pertinent to the analysis of the production of digital cameras are also key forces in driving a rise in consumer demand, at least as far as camera enthusiasts are concerned. While this empirical analysis certainly provides a qualitative link between output and technology, there are other methods that help to provide a more quantifiable link.

One way to establish this more precise link is to map the changes in innovation, quality and device costs onto the trends outlined in the previous chapter. Regrettably, this approach, too, involves issues that are not ideal for Mooresque analysis. These arise from the fact that the innovations under discussion are heterogeneous in design and purpose, whereas Moore's Law was originally focused on the pace of innovation in transistor density for an electrical component with only two functions (amplification and switching of electrical signals). The various image-capture formats used in low-budget production were neither harmonious in purpose nor in the type of technology they used. Although each format basically performed the same task in taking a sequence of photos, the analogue film, analogue tape and digital formats were all different in technical configuration and in the types of filming for which they were originally intended. An example of this is in the difference between the analogue film and analogue videotape. When first created, analogue film, particularly 35mm film, was designed for cinematographers who wished to create high-quality movies for projection on large screens. In contrast, the analogue tape format was developed for less demanding image-quality and recording needs, for display on smaller screens. At its low end, the VHS tape format was used to record low-quality images for unedited playback on televisions; whereas the Betacam tape format was made for broadcasters who needed a medium-quality

image for transmission purposes. The original roles of analogue film and tape in the market would eventually be transferred to the digital file, but the point is that these distinct formats were created for different purposes, for different users, and were all priced accordingly.

Irrespective of their original intended use, however, some insight can be gained by mapping the evolution of the image-capture formats onto the rise in production; such an analysis is presented in Table 13. The analysis encompasses an eclectic-looking collection of devices; however, these cameras, as well as related models, all share a common heritage in British low-budget filmmaking since they were all used on three or more films surveyed in this study. In this case, each format, with corresponding sample digital camera using that format, has been compared with the others, using a test that measures quality, cost and the physical features of the technology concerned. This has been achieved by dividing the various formats into sub-formats (HD, 35mm), listing real examples of films that used each sub-format, and by providing a benchmark against which to compare the various ranges of image quality—in this case, the number of horizontal lines per image. The analysis then outlines each sub-format by listing an example camera using that format, along with the time when it entered the market, its main physical and technical features and its original retail price. The methodology, assumptions and sources for this comparison are provided within the Table 13, but it should be mentioned here that not every camera expert would agree with these estimations; in fact, the price and weight estimates, and the approach used in this analysis to compare the quality of an analogue film frame with an image captured on one of the digital formats, are undoubtedly subjective and continue to be debated by camera-enthusiasts (Appendix D). However, despite their subjectivity, it must be stressed that even if other Mooresque elements had been used, they would likely still yield the same overall results, since technological innovation of all Mooresque elements still occurred.

ANALOG FILM	ANALOG TAPE	DIGITAL	HD	RED
16mm Film s16mm Film	Video VCR/VHS SVHS Hi8mm	Digital Betacam Betacam SP	DV MiniDV DVCam Digital DSLR	HiDef HD-Cam HDV HDDV XDCam
35mm Film s35mm Film	Betacam Betacam SP	Digital Betacam Betacam SP	DV MiniDV DVCam Digital DSLR	HiDef HD-Cam HDV HDDV XDCam

Technology Format	Analog s16mm	Analog s35mm	Analog Video	Digital Betacam	Digital MiniDV	Digital HD	REDCODE
UK Low-Budget Films that used this format:	Bowl (2000), Rhoads of Fire (2000) and History Boys (2006)	Born Romantic (2000), Neasy Neighbours (2000) and Page (2009)	Denis Faise (2000), We Love You, John Sitt (2000) and Advanced Warriors (2000)	Spin (2000), Telephone Deceives (2000) and The Debt (2000)	Kit of Evil (2000), Actors (2004), Sir (2009) and Six Feet (2009)	The Silencer (2005), Stark (2009) and Monsters (2010)	Debra (2006), The Spair (2009) and Being Six (2011)
Typical Line Resolution - Horizontal (Figure 21)	1000 to 1400	1000 to 1400	170 to 500	480	480	1080	4096
Example Pro/Prosumer Camera/Camcorder	Amiflex 16 SR3	Amiflex 535	Panasonic M10 VHS	Sony DVM790	Canon XL1	Sony PMWEX3	RED ONE WAB
- Year/first model introduced	1992	1990	1989 (est.)	1999	1997	2008	2007
- Number of comparable model upgrades (2000 - 2012)	NA	NA	NA	NA	8	3	2
- Main technology/features advertised	Super 16 support	Sync-sound	X8 Optical Zoom, Stereo Sound	Last of comparable models	16.9 / 4.3 Switchable FT CCD	HD quality	4K HD (close to 65mm equiv)
- Line resolution (H)	1000	1000	250	450	360	1080	4096
- Interchangeable Lenses	Y	Y	N	Y	Y	Y	Y
- Blowup to 35mm needed	Y	N	Y	Y	Y/N	N	N
- Camera weight (lbs) without mag, lens or accessories	15.4	17	5.9	11	7	7.9	10
- Power source	24 V	24 V	12 V	12 V	7.2 V	12 V	12 V
- Original list price*	\$52,500	\$146,875	\$8,000	\$34,940	\$6,500	\$8,320	\$35,700
- Filmstock cost (270 mins)	\$3,451	\$15,066	\$50	\$40	\$40	\$300	\$300
Price Comparisons:							
- Purchase Price Per Min (90)	\$622	\$1,799	\$89	\$389	\$73	\$96	\$400
- Purchase Price Per Line (H)	\$56	\$162	\$32	\$78	\$18	\$8	\$9
- Purchase Price Per Min - Inflation adjusted (Figure 22)	\$691	\$1,999	\$159	\$432	\$97	\$99	\$40
- Purchase Price Per Line (H) - Inflation Adjusted (Figure 23)	\$62	\$100	\$57	\$86	\$24	\$8	\$9
Assumptions:							
- Inflation Index at 2011 Equivalent (www.westegg.com)	1.1109	1.1109	1.7752	1.1109	1.3333	1.0312	1
- Camera Purchase Price Source	From 2006 Amr Price List	From 2006 Amr Price List	From 1989 Advert in Camera Today	Original price listed on broadcaststore.com	Purchase price paid by author.	Original price listed on broadcaststore.com	Source 2012.ae.utatplus.com
- Horizontal Line Estimate For Film	Assumed same from 35mm source	(Beronini, Mahler and Sintas 2004)	na	na	na	na	na
- Film Stock / Tape / Memory Costs	Kodak Calculator	Kodak Calculator	Kodak Calculator	Tape Costs	Tape / Memory Costs	Memory Costs	Memory Costs
- Cost of film stock assumptions 2012 numbers	16mm (24fps 3 to 1)	35mm (24fps 3 to 1)					
Format and Shooting Ratio (90mins at 3x = 4hrs 30 mins)	9,720	24,300					
Film Length ft	400	1,000					
Length per roll	142	620					
Cost per roll (feet Kodak)	\$3,451	\$15,066					
Cost to film movie							

Table 13 - Image-capture technology format mapping

When the results of the camera comparison were mapped onto the growth trend in UK low-budget production and an exponential trend line is plotted, several Mooresque observations become evident, giving support to a growth-from-innovation hypothesis (Table 13; Figures 11 and 21). The first observation relates to the rising levels of quality in technology and the subtle effects these improvements had over time on the price paid for those innovations by moviemakers. With the exception of analogue film, each successive sub-format gained an increase in image quality as evident in an exponential trend increase (in red), measured as the number of horizontal lines in an image (Figure 21). Thus, the analogue Betacam format delivered an improvement over analogue tape, and digital Betacam had a higher resolution on average than analogue Betacam. While this trend does not confirm a direct correlational link between technological advancements and output growth, when the effects of these improvements on the price for them are studied, a correlational link becomes more apparent.

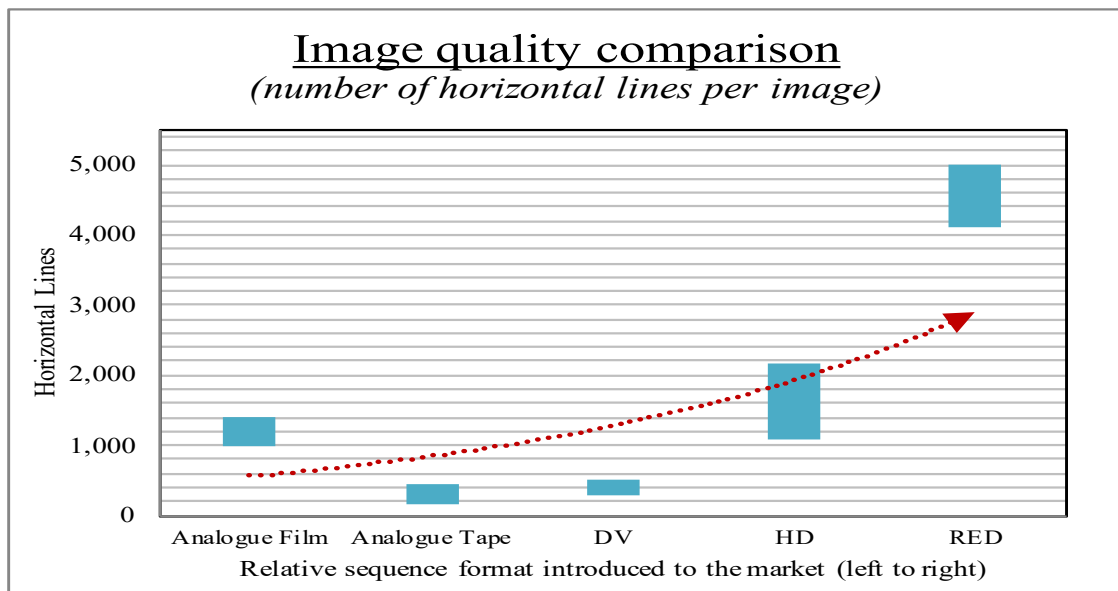


Figure 21 - Image-capture format quality comparison (horizontal lines)

The significance that this technological innovation has had for production growth can be observed by taking, for each camera, the ratio of its inflation-adjusted retail prices to its

image quality, and then plotting these ratios, at the times of the cameras' availability, over the growth trend in low-budget production (Figure 22). Doing this, it is not surprising to note that the 35mm Arriflex 535 camera has the highest price-quality ratio. This is because the cost of the camera in relation to the level of quality it provides has always been prohibitive for British low-budget filmmakers (highest quality to highest cost), whereas at the lower end of the spectrum the VHS Panasonic M10 has the lowest price-quality ratio (Figure 22A). When the five most used formats in UK low-budget moviemaking are compared, the trend line's downward trajectory becomes more visible (in red). This can be seen when omitting the data on analogue formats and viewing only the transition from Betacam to digital technologies. Therefore, the decision to interpret these trends from a Mooresque viewpoint is justified since the data indicates that as image-quality increased during the period, the costs of those improvements decreased (Figure 22B).

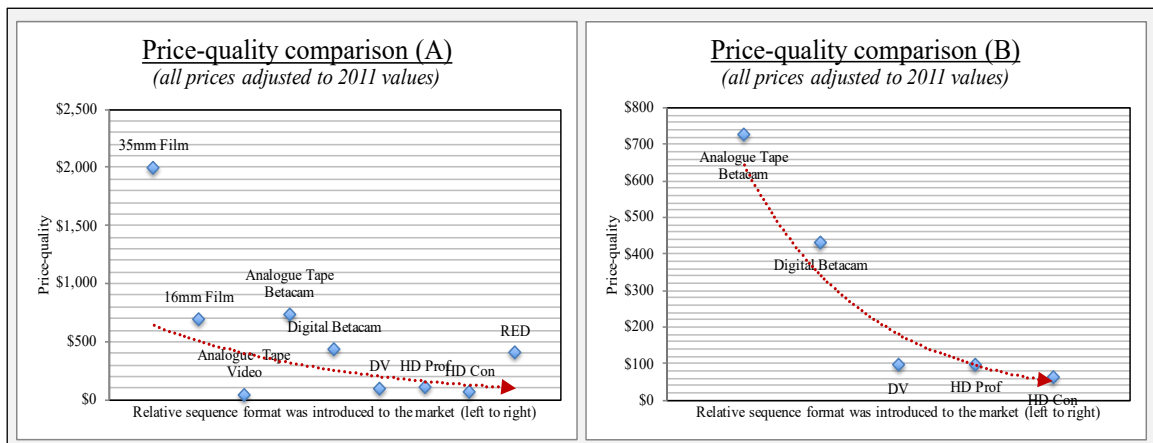


Figure 22 - Price-quality ratio comparison by image-capture format

Not only did the price-quality index fall greatly during the digital revolution, but there was also an even more pronounced fall in the camera cost-production index, defined as the ratio of a camera's cost to the total runtime of all films shot with the camera. This index apportions camera cost evenly over all minutes of a single 90-minute feature-length production. This

is a realistic assumption from a low-budget perspective since most British low-budget movie production firms only make one film and, as a result, have to forgo an opportunity to gain a level of economies of scale by having to assign the entire cost of a camera to one movie (Follows 2013). Note that the trajectory of the average price-per-minute-of-production index factors into its calculation an approximate chronology of the time when each new format was introduced into the market. This index not only gives a comparison between sub-formats but also provides a view of how costs behaved over time as low-budget production rose. Here again the evidence suggests a rapid fall in camera cost per minute (in red), offering some reasoning for the rapid fall in average total production costs noted later in Chapter Six, and coinciding with the increase in low-budget production (Figure 23).

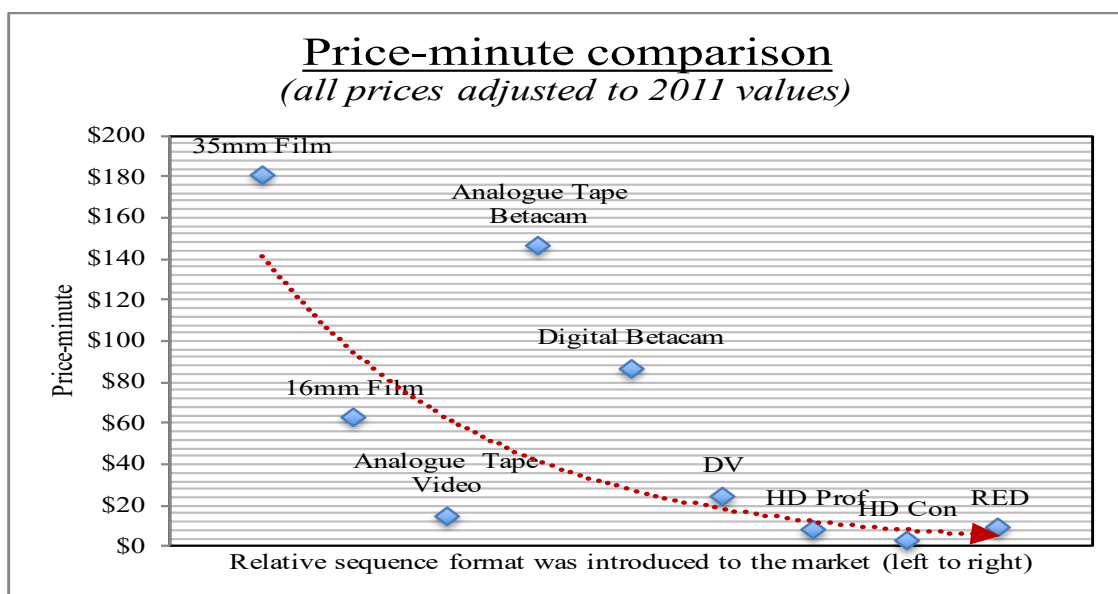


Figure 23 - Price-minute comparison by image-capture format

The analysis presented here is, clearly, only a broad assessment since the example cameras represent only a sample of all the innovations that occurred. However, Mooresque analysis in this instance offers convincing correlational evidence for why low-budget film production increased and overall average costs decreased; a rapid improvement in image-capture quality

and a fall in the average cost for this improvement created the environment to foster such outcomes (Figures 11, 22 and 23; Chapter Six); a fall in cost for higher quality creates the right environment for a rise in consumer demand—in this case, the demand by low-budget filmmakers for cameras—and logically corresponds with a rise in production (Kotler et al. 2012). This is especially evident for films made for \leq £500k, since digital image quality comparable to that of 35mm film became increasingly available to a wider constituency of moviemakers. Innovation, however, did not take place only in camera technologies.

4.3 Software technologies

Filmmaking software applications also have Mooresque elements that can be measured to help examine the likelihood of a growth-from-innovation hypothesis. Two such elements are the evolution of certain software products during the period and the benefits they offered low-budget producers. However, before the results of these measurements are presented, it should be noted that filmmaking software were priced in several ways during the period—total purchase and annual subscription—and were often categorised by their general purpose (planning, organising, implementing and controlling) or by a specific task they enabled in the supply chain (Figure 24). As the capabilities of applications increased, it became more difficult to define them with a single category. Nevertheless, all moviemaking applications have Mooresque-elements and, as with the cameras, it is possible to assess changes in their design and performance (transaction speed and connectivity), as well as the pace of such changes. The assessment of such changes are useful in this case since they can indicate any reductions in the price-performance ratio and if producers are achieving a more efficient use of resources from a more integrated supply chain process (Meredith and Mantel 2008: 45).

Basic software categories

(low-budget film supply chain process)

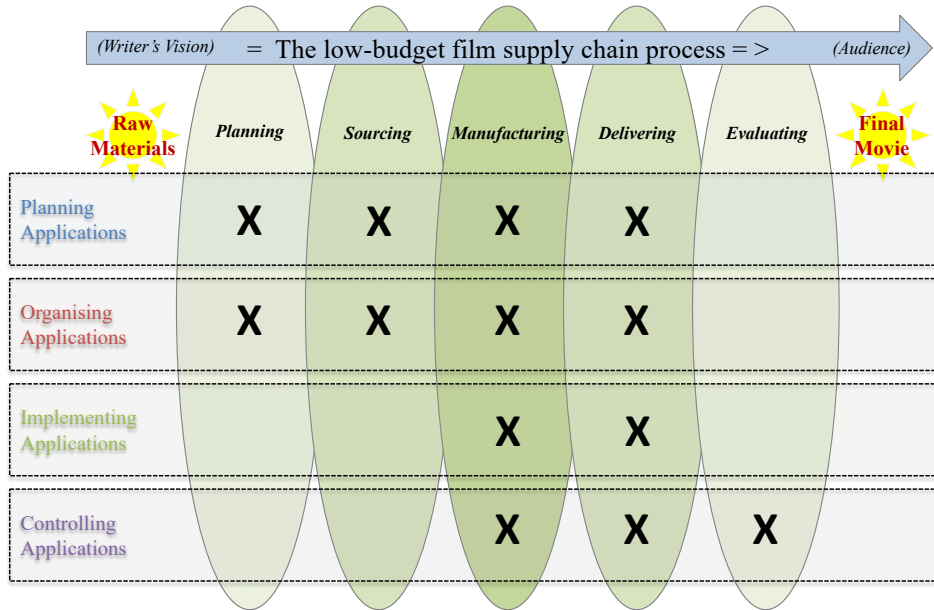


Figure 24 - Basic software categories

The origins of this increase in enablement capability can be traced back to the 1980s, when affordable off-the-shelf production software, designed specifically for the script-to-screen supply chain process, became widely available. When introduced into the market these tools were originally designed to improve the efficiency and quality of analogue technology-based workflows for medium-to-high-budget films, but by the time the digital revolution began to take hold in the 1990s, a much larger and disparate collection of new software had come into existence, based on cost-efficient workflows that used digital technology. These new tools not only provided low-budget producers with the means to improve the image and sound quality of their productions at only a fraction of the cost of the older technologies; they also offered them the chance to reduce the level of risk in their supply chains, by improving the coordination of planning, organising and controlling tasks (Figure 24). These new planning and sourcing applications, such as Scriptor (1983), Movie Magic Budgeting (1985) and Movie Magic Scheduling (1987), were at first designed as stand-alone tools for analogue

technology-based workflows and priced for movie and TV projects in the medium-to-high-budget ranges. However, by the end of the twentieth-century, they had been improved and redesigned to work with other applications using digital technology-based workflows, at price levels well within the means of low-budget productions.¹²⁴ One way to illustrate the impact of this transformation is to consider a few well-known tools in the all-digital supply chain and the benefits producers were able to derive from their proper use.

4.3.1 Case study: Final Draft

In the planning stage of the filmmaking supply chain, perhaps the most well-known and widely used implementing tool for film content development during the digital revolution was the Final Draft software made by the California-based firm Final Draft Incorporated.¹²⁵ Developed in the 1990s as a screenwriting tool and still promoted as the ‘number one selling software program in the UK’ for writing movie and TV scripts, Final Draft’s evolution exemplifies how filmmaking software applications greatly improved their functionality, reliability and price-performance ratios during the period (Final Draft 2014). This is because the makers of Final Draft constantly focused on improving the tool’s ease of use and affordability. Although there are no published data on the number of UK low-budget films that used Final Draft from 2000 to 2012, commentary suggests that as early as 2002, with the introduction of Final Draft Version Six, the application had become the de facto tool for scriptwriting (Robillard 2002). This evidence would seem to corroborate the manufacturer’s claim that it dominated the market throughout the digital revolution and conclude it was widely used in the low-budget sector.¹²⁶ Final Draft has always primarily been a word-

¹²⁴ One early example of how prices were lowered to low-budget levels can be observed with the screenplay formatter software Scriptor. Launched in January 1983 as the world’s first screenplay formatting software it was priced at \$495 in the United States, but after several months of dismal sales it was re-priced at \$295 and stayed at this price for the next ten years (Write Brothers 2012).

¹²⁵ Final Draft® is a registered trademark of Final Draft, Inc.

¹²⁶ This assertion is based on the findings of a review of film schools presented in the next chapter. It indicates that 91% used Final Draft as their tool of choice. Furthermore, it is likely many Final Draft licenses used at that time were either legal student licences that were greatly discounted or illegal copies (prices as low as £15 for older licenses were found on online auction sites during this review).

processing application for the writing of scripts, and so the main benefit for writers has been the easy formatting of words into a wide array of standard industry formats, for example the Warner Brothers' screen-play format. In addition to these well-established product features, however, were also additional options that offered low-budget producers the opportunity to improve the efficiency of their supply chains and thereby to reduce the level of risk in making their projects. When Final Draft was used in this manner, it could act as a planning and organising tool that helped producers to better manage much of the supply chain process.

From a controlling application perspective, Final Draft, and other similar applications, gave producers the means to better package their projects and assist them with the identification of resources before the start of principal photography (Figure 24). In planning, for example, it could be used to assist the producer in promoting and packaging the script for potential investors via an option that could change a raw script file into a story outline or treatment document, which could then be used to create top-sheets and investor prospectuses more easily. Pre-visualisation and promotional materials could also be created from this raw script file option; these, in turn, could be used to initiate the development of storyboards which could be used as a marketing tool for those searching for finance and for named cast and crew. The ability to transform a raw script file may seem to be a simple innovation, but at the time its wide acceptance in the industry empowered producers to build a host of marketing and productivity tools, based on the latest version of the script, in a way that was faster and less expensive than ever before. It has also always been imperative that the producer protect the literary rights of the script during the planning stage; Final Draft offered an option to copyright the script, thus saving the producer time and effort in a task required to protect their intellectual property rights.

Final Draft also offered a number of preconfigured reports that could be adopted to assist the producer, later in the process, to better project manage the cast, crew, locations, props and scheduling. For instance, Final Draft files could be imported into most of the project-management applications available at the time, including Gorilla, Movie Magic Budgeting and Movie Magic Scheduling. The Final Draft script file, in these instances, could then be used to generate shooting schedules, bottom-up budgets, daily call sheets, spending reports and almost any other report needed by the producer and assistant director. Before the digital revolution, these reports had been laborious and expensive to generate, since they required specialised skills and were based on cumbersome tools such as strip-boards, typewriters and calculators. Although specialist skills were still required for these tasks at the turn of the millennium, reports of this kind became much easier to generate using Final Draft.

While the hypothetical low-budget film supply chain model described in Chapter Two makes clear that the main activities needed to produce and deliver a film remained relatively unchanged throughout the digital revolution, the use of Final Draft offered producers an opportunity to streamline planning activities, ultimately helping to reduce the cost of making a low-budget film. Cost savings could be achieved in three ways: by avoiding the purchase of more expensive tools; by no longer needing to buy as many tools; and by not needing to do tasks required in the analogue era. For instance, a licence for Final Draft Version Six could be purchased in 2002 for £80 (not adjusted for inflation). It offered the same basic functionality, in terms of report generation, as using Word, Excel (for approximate scheduling) and Movie Magic Scheduling combined. Furthermore, not only did Final Draft Version Six reduce the need for a larger number of project management tools, it was also considerably less expensive than its rivals that had a similar level of basic functionality (Movie Magic Screenwriter and CeltX), thus offering film producers the opportunity to save

tool acquisition costs and avoiding the need acquire the extra skills needed to manage and integrate a more disparate and larger collection of software tools. For much of the digital revolution, older versions of the software were also still widely available from third-party sellers, such as eBay, allowing for the possibility of even greater cost saving. However, the cost saving associated with its purchase price pales in significance to the opportunity the tool offered in the time saved by carrying out multiple supply-chain tasks simultaneously, particularly call sheets and scheduling changes.

4.3.2 Case study: Final Cut and other non-linear editing tools

Scriptwriting applications were not the only software tools to experience innovation and a fall in price-quality ratios over the course of the period. Due in large part to an intense rivalry between Apple Inc., Avid Technology Inc. and Adobe Systems Inc., software for editing and special effects also underwent a remarkable series of technical advancements. Of particular note was the arrival of affordable non-linear editing software given that such tools offered the means to greatly improve the efficiency of supply chains and the quality of films in ways that fundamentally favoured low-budget production. Like digital cameras, these inexpensive high-performance editing tools also had Mooresque traits since they were priced within the reach of most producers and were far more interoperable with cameras in ways that provided numerous options to streamline workflows and costs. Examples of how such efficiencies and improvements could be gained—including the avoidance of expensive tasks needed in analogue workflows, the option to rapidly make a rough edit in order to raise further finance and how they enabled the creation of low-cost and serviceable versions of the film that could be used for delivery without costly deliverables—will be discussed later in this chapter and in Chapter Six. However, it is worth noting at this point that these and other improvements to the supply chain could be achieved while simultaneously improving

a movie's audio-visual quality to a level that, prior to the digital revolution, only studios were able to afford.

To introduce this point, before the 2000s, low-budget cinematographers and editors could only make their films with a supply chain that used an all-analogue workflow. This required exposing negatives, cutting and rearranging those negatives into a certain order and then copying them to other negatives so that they could be seen in cinemas. This process was prohibitively expensive, laborious and cumbersome for low-budget producers. For example, an all-analogue process necessitated the daily shuttling of exposures between shooting locations and a negative-developing lab so that those 'dailies' could be checked for errors.¹²⁷ Yet, with the advent of digital filming and editing within an all-digital workflow, time-consuming and costly methods such as these were no longer required. Digital footage could be instantly reviewed and edited on location if needed, and if any 'in-the-can' footage was found not to be satisfactory, it could be reshot without the need for costly 'pickups' after the end of principal photography (Figgis 2007).¹²⁸ When digital cameras and non-linear editing tools began to capture and process sound, the filmmaking process became even more streamlined, since this allowed audio and video to be recorded together on the same device, negating the need to gather and synchronise separate clap-board sound, all at higher quality levels and increasingly lower costs. In addition to these significant developments, there were many other all-analogue-based tasks that were made redundant with the arrival of all-digital workflows—although low-budget producers would have to wait until the digital revolution gathered pace before they could use these workflows.

¹²⁷ The term 'Dailies' means the raw, unedited footage shot on a particular day during the making of a movie. In all-analogue productions, dailies are often reviewed at the end of each day to ensure the scenes shot for the day have been completed.

¹²⁸ The term 'in-the-can' means footage that has been recorded during the manufacturing sub-process and 'pickup's refers to scenes that have been missed or have to be shot over again.

When they first entered the industry in the early 1990s, most non-linear editing software was engineered and priced for multi-million dollar movie projects.¹²⁹ These new tools, most prominently Avid's Media Composer and Media 100, offered workflows based on a high-quality analogue-to-digital-to-analogue (A2D2A) process that provided technical and procedural advantages over more established tools used in an all-analogue workflow.¹³⁰ These tools, however, were expensive and required specialised technical skills to operate and maintain. They therefore remained beyond the means of most low-budget producers (Friedman 2011). Adobe Premier, Avid Cinema and other less costly entry-level software applications did exist at the time, but these early versions of consumer non-linear editing software were technically limited, and so most low-budget film editors had little choice but to continue with editing on celluloid.¹³¹ Then, in 1999, a product breakthrough occurred that would intensify the rivalry amongst software manufacturers and ensure that a Mooresque environment would exist in all future developments of non-linear editing tools. This breakthrough was the introduction of Apple Inc.'s Final Cut Pro application.

With low-cost non-linear software tools like Adobe Premiere and Avid Cinema still in their technical infancy, Apple's Final Cut Pro gave British low-budget producers their first real chance to acquire a professional studio-quality editing system that was easy to operate and that negated the need to continue with the more time-consuming all-analogue workflow.

¹²⁹ Some media historians view the CMX 600, created by CMX Systems in 1971, to be the first non-linear editing tool, but the early 1990s is when market acceptance began; for this reason that decade customarily marks the beginning of its use (Bargen 2008).

¹³⁰ From the viewpoint of a big-budget film editor, these technical advantages were numerous. With the advent of non-linear editing tools, such as Avid's Media Composer, the destructive act of cutting film negative was eliminated and replaced with a much more natural process of editing. In his book *Practical DV Filmmaking*, Russell Evans describes non-linear editing tools as an audio/video equivalent of word processing, with one of the biggest advantages being that the original source material is not modified during editing and a single environment is created where instant changes can be made and reviewed (2005). The instant creation of edit decision lists (EDLs), faster arrangement of content via timeline control and controlling 'generation loss' when special effects are applied were also benefits over previous linear editing methods and tools.

¹³¹ Early versions of Adobe Premiere required a wide variety of different hardware components that were not universally compatible with analogue video cameras. Because of this, data transfer rates were slow for video input and could only support low-resolution (160 x 120 pixels) film creation. Up until 1993, Avid's Media Composer could be used for small projects only, like commercials and music videos, since its hardware platform could access just 50 gigabytes of storage at a single time. Although the software itself was affordable for the UK low-budget producer, a plentiful supply of used Moviola and Steenbeck machines were available for all-analogue workflows. For many editors who were trained on these devices, these remained viable options for low-budget film editing until the digital revolution.

One important feature of this product was the existence of a single environment for editing, effects and compositing. This meant that editors no longer needed to buy, configure and maintain three separate software environments, and they could also save more time and money. The tool also included other groundbreaking innovations, such as in-and-out split-marks for audio and video cuts, drag-and-drop movement of content files, time codes and audio/visual sync capabilities—all of which had the potential to reduce process complexity when compared with all-analogue and A2D2A workflows. The tool was also easy to use since it had an intuitive menu, yet still appealed to more discerning Avid-trained editors by including the option to use an Avid-like menu and command board. In addition to software, the Apple platform also simplified existing hardware configurations with its use of ‘plug and play’ hardware. This was a major innovation in its own right, for unlike other non-linear editing tools that required additional hardware boxes and motherboard cards, the Final Cut Pro system needed only a standard Apple computer, a platform that also provided fast audio and video file data transfer, FireWire. However, as important as all these innovations were, what made Final Cut Pro such a major breakthrough for low-budget production was that it was a ‘professional system’ that cost less than £800 to put into operation (Friedman 2011). At this price and with all these features and workflow benefits, Final Cut Pro quickly became the most-used editing application on the popular Mac platform (ibid.).¹³²

Of course, Apple should not be given all the credit for bringing non-linear editing to the low-budget sector. Adobe, Avid and other software manufacturers also made crucial

¹³² Avid Technology was an early loser in this ‘software war’ with Apple Inc. and Adobe Systems Inc. Introduced in 1989 Avid’s Media Composer would principally create, then for the next ten years dominate, the non-linear editing market for big-budget feature-film editing. After many early innovations, such as providing true 24-frame-per-second capture and playback, its industry acceptance became evident when AMPAS gave the software an award for Science and Technical Achievement in 1994 and Walter Murch used Media Composer to edit *The English Patient* (Minghella 1996) for which he won an Oscar in 1997 (Hilton 1998). Its technological complexity, however, was also matched by its price. Thanks in part to its dominance over its direct rivals (Media 100), the price for a software bundle grew from US\$24,000 in 1993 (Model 210 with a Mac II) to between US\$66,500 (MC 1000) and US\$100,000 (MC 8000) in 1998 (Pullman 2001). Then, with the increasing performance capability of Adobe Premier and the introduction of a US\$1,000 Final Cut Pro bundle in 1999 (a solution that would provide most of the performance of its costlier rival) Avid was forced to slash its price while improving its product. The effect was that by 2011 Media Composer was selling for less than US\$3,000 (Friedman 2011).

contributions to image processing quality, workflow simplification and cost reduction. Important innovations, such as eight-bit audio, support for NTSC/PAL, dynamic previewing and inter-frame editing, had already come into existence by the time Final Cut Pro was announced (Table 14). That being said, however, Apple's entry into the editing market was a major catalyst for change that roused Mooresque behaviour in a group that had previously been focusing on large-scale production, that had been small in number and that had shown little improvement in price-quality ratios. When Final Cut Pro began to gain market share in the 2000s, Adobe, Avid and others were forced to accelerate their development efforts and lower their prices. This resulted in a more intense competitive environment that led to an impressive series of innovations, such as DV, HD, 2k and 4k technologies. These changes ultimately gave most moviemakers the chance to make studio-quality movies (Table 14).

EDITING SOFTWARE <i>(Innovations, versions and pricing)</i>			
Manufacturer/ Year:	Apple	Adobe	Avid
1989			Avid v1 (Macintosh)
1991		Premiere v1 (Macintosh) Key Features: <ul style="list-style-type: none"> • QuickTime support • Supported 160 x 120 pixels • 8-bit audio Approximate Price UK£4,500 <i>(Software Only £900)</i>	
1994		Premiere v4 (Macintosh) Key Features: <ul style="list-style-type: none"> • Dynamic previewing • Time-lapse capture • NTSC 29.97 frame rate support • 32-bit architecture (v4.2 1996) Approximate Price UK£4,500 <i>(Software Only £900)</i>	Media Composer v5 (Macintosh) Key Features: <ul style="list-style-type: none"> • Multicamera editing • Realtime • Photoshop compatibility • QuickTime • 64k Macintosh hardware Approximate Price £15,000 <i>(Model 210 with HW)</i>
1998		Premiere v5 (Win/Macintosh) Key Features: <ul style="list-style-type: none"> • Up to 3-hour project length support • Dual processor support Approximate Price UK£3,860 <i>(Software Only £860)</i>	Media Composer v7 (Macintosh) Key Features: <ul style="list-style-type: none"> • Interframe Editing • AudioSuite plugins • Uncompressed SD video (v8 1999) Approximate Price £41,500 <i>(MC1000 with HW)</i> Approximate Price £60,000 <i>(MC8000 with HW)</i>

EDITING SOFTWARE <i>(Innovations, versions and pricing)</i>			
Manufacturer/ Year:	Apple	Adobe	Avid
1999	Final Cut Pro v1 (Macintosh) Key Features: • Multi-track timeline and drag-and-drop editing • Firewire/DV support • Broadcast TV quality • Editing and compositing in a single workflow interface Approximate Price UK£2,750 <i>(Software Only £750)</i>		Media Composer v8 (Macintosh OS 8) Key Features: • Uncompressed SD video • On Windows NT 4.0 (v9) Approximate Price £55,000 <i>(Including HW)</i>
2001	Final Cut Pro v2 & v3 (Macintosh) Key Features: • 3:2 pull-down • 24 fps support Approximate Price UK£2,500 <i>(Software Only £750)</i>	Premiere v6 (Win/Macintosh) Key Features: • Web video and DV support • Title editor • Audio mixer Approximate Price UK£2,400 <i>(Software Only £450)</i>	Media Composer v10.5 (Macintosh OS 9) Key Features: • SD 24 fps support • On Windows 2000 Approximate Price £12,600 <i>(Including HW)</i>
2003	Final Cut Pro v4 (Macintosh) Key Features: • Live Type • Soundtrack • Cinema Tools Approximate Price £2,450 <i>(Software Only £750)</i>	Premiere Pro v1 (Win) Key Features: • 5.1 surround sound support • Audio effects • Colour correction tools Approximate Price UK£2,400 <i>(Software Only £450)</i>	Media Composer v11 (Win/OS X) Key Features: • DV Support (Option) Approximate Price £8,812 <i>(Including HW)</i>
2004		Premiere Pro v1.5 (Win) Key Features: • After effects clipboard support • HDV support (v1.5 2005) Approximate Price UK£2,450 <i>(Software Only £450)</i>	Media Composer v2.0 (Win/OS X) Key Features: • HD Support • 10-bit video Approximate Price £8,125 <i>(Including HW)</i>
2006	Final Cut Studio v5 – v6 (Macintosh) Key Features: • HDV Support Approximate Price £2,950 <i>(Software Only £950)</i>	Premiere Pro v2 (Win) Key Features: • HDV editing • SD and HD support • Multicam editing • 10-bit and 16-bit colour res support Approximate Price UK£2,500 <i>(Software Only £500)</i>	Media Composer v2.6 (Win/OS X) Key Features: • XDCam HD • Mojo SDI • Safe Colour Limiter effect • Offline editing with low-bandwidth DNxHD35 technology Approximate Price £6,125 <i>(Including HW)</i>
2009	Final Cut Pro v7 (Macintosh) Key Features: • REDCODE support • Real-time editing for DV • SD and HD Approximate Price £2,800 <i>(Software Only £800)</i>	Premiere Pro CS4 (Win/OS X) Key Features: • REDCODE Support • DV/HDV playback • IMX footage support • 16 channel audio tracks Approximate Price UK£2,570 <i>(Software Only £570)</i>	Media Composer v4.0 (Win/OS X) Key Features: • REDCODE support • DX hardware support • Improved multi-threading and GPU support • RT timecode generator • XDCAM 50mb format • GFCAM 50mb/100mb support Approximate Price £4,555 <i>(Including HW)</i>
2011	Final Cut Pro vX (Macintosh) Key Features: • Native 64-bit application • 5k resolutions Approximate Price £1,950 <i>(Software Only £150)</i>	Premiere Pro CS5 (Win/OS X) Key Features: • Native 64-bit application • Final Cut Pro XML support Approximate Price UK£2,510 <i>(Software Only £510)</i>	Media Composer v6.0 (Win/OS X) Key Features: • Native 64-bit application • RED camera support (AMA, EPIC) • HD-RGB support • HDCAM SR Lite native editing Approximate Price £3,999 <i>(Including HW)</i>
NB: This table contains a basic listing of technology and pricing developments in editing software that have historically been used in the production of UK low-budget feature-length films. This data was collected from numerous non-academic sources including the websites of the three manufacturers listed, online user commentary, online advertisements, printed consumer evaluations and trade press commentary and adverts held at the British Film Institute. Since the data presented in this table is to be used for illustrative purposes and not for exact measurement, and since the number and detail of these sources make listing them cumbersome to present, these sources have not been listed in this study.			

Table 14 - Editing software innovations and pricing

These technological innovations and benefits were so significant that a compelling case can be made that if they had not taken place there would not have been an equivalent rate of

innovation and acceptance in digital image-capture technology—and vice versa. This is because the usefulness of each of the two product sets, digital cameras and editing tools, is dependent on the technological status of the other; one product set could not advance without an equal state of technical innovation in the other and still gain wide consumer acceptance. This ‘innovation interdependence’ was particularly evident in the development of HD capability, something that originated in digital cameras, but could have never been fully utilised in motion-picture making if an equivalent advancement in editing software had not taken place. Proprietary technologies, such as REDCODE and native 16-bit, also illustrate an innovation interdependence linkage; in addition, they show how the forces of competitive rivalry accelerated the overall pace of innovation. As rivalries intensified, with each software and camera maker trying to out-innovate and out-price competitors in their pursuit of market share, pushing the level of quality ever higher in both technologies, Mooresque forces increasingly started to prevail, giving consumers access to better technology at lower prices (Table 14). As a result, the rate of improvement in price-quality ratios for non-linear editing applications rose together with the ratios shown earlier for digital image-capture technology; this is a clear mechanism by which technological innovation could have driven the rise in UK low-budget film production and a lowering of its average cost (Chapter Six).

4.3.3 Case study: After Effects and other post-production applications

Like non-linear editing applications in the low-budget supply chain, special effects software and other post-production applications also played a role in creating an all-digital workflow. An example is Adobe’s After Effects application. After Effects was first introduced into the market in 1993 by the firm CoSA, and after being bought by Adobe in 1995 it quickly became a popular tool for creating animation, motion graphics and visual effects. Like the above-discussed non-linear editing applications, After Effects was a layer-oriented software

tool that allowed each media file (video, audio or still) to be individually changed and controlled. Though originally designed for layered compositing, the software was at the forefront of technical innovation in special effects at the time and often complemented the developments in non-linear editing technology they could use the same digital file formats. With a constant focus on the creation of new visual effects, innovations such as 3D channel effects (1999: v4.1), 3D layers and lights (2001: v5.0), Adobe Photoshop 7.0 integration and later REDCODE support (2008: v9.0), helped the tool keep pace with and complement non-linear editing applications. Typically priced at <£500, and with a long history of innovations throughout its product life cycle, After Effects always demonstrated an attractive rise in its price-quality ratio. From improving the quality of existing footage to generating new content from scratch, the application became a sophisticated, versatile and easy-to-master tool that could be used for a broad range of purposes. For instance, low-budget editors could remove unwanted artefacts from a scene, thus avoiding the need for pick-ups. They could also introduce new elements, such as different skylines and blue screen, or create studio-quality credit titles. All of these had been expensive activities in the analogue era that prevailed before 2000, but could now be carried out at the press of a few buttons.

There were many other instances of innovation in post-production applications, all providing low-budget producers with the chance to make studio-quality movies: two further examples worth mentioning in this context relate to post-production ADR and to digitally created orchestral-sounding soundtracks. These technological contributions to all-digital workflows were equal in importance to the more prominent tools discussed earlier, but software such as Avid Pro Tools did not surpass that level of pervasiveness. Further analysis of these applications would not add anything qualitatively new to the understanding of the linkage between innovation and the trends shown in Chapter Three. However, from a broader

filmmaking software application perspective, the technical advances in these and similar tools show how the digital revolution was a period of unprecedented innovation and, that it was one that was constantly providing improving price-quality ratios.¹³³ Hence, these Mooresque advances not only yielded benefits to medium and large-budget films, but they also provided producers with tools that could achieve higher visual and audio quality.

4.4 Distribution, marketing and exhibition technologies

In response to the needs of producers and consumers, innovation in tools and methods also took place in the later stages of the delivery sub-process. These needs stemmed from low-budget producers who not only were concerned with moviemaking, but also wanted access to efficient, effective and affordable distribution and marketing channels so that their films could be viewed by as many people as possible. For such producers, the digital revolution offered new and enhanced tools that could help satisfy these needs. Such tools underwent significant amounts of Mooresque-type innovation during the period and provided access to affordable all-digital script-to-screen workflows that were based on entirely new modes of distributing, exhibiting and marketing films.

The enabler of these new delivery channels was the Internet, which had existed for over four decades, but which became accessible to the general public in the 1990s once commercial traffic was allowed, and once certain innovations became available, such as hypertext, the World Wide Web, browsers that were easy to acquire and use and the expansion of email tools. Even so, from an online delivery view, the 1990s were still years of poor data-transfer

¹³³ From a manufacturer's viewpoint, the price-quality ratios were improving for two reasons. First, in Mooresque fashion, performance and functionality were constantly being increased, while a competitive environment kept pressure on pricing levels. However, for the UK low-budget producer, the price-quality ratios were also improving for other reasons. Manufacturers continually offered discounted pricing options for certain types of moviemakers, such as academic pricing. Besides this, as stated before, the wide availability of less expensive older versions (on eBay), opportunities to purchase previously owned software, and the availability of free online tools made it likely that 'grey or free market' price-quality ratios were even higher.

speeds and unreliable connections. People were still using 56k modems, a speed suitable for downloading a short music track, but not suitable for downloading a 60mb movie that could often take days to complete.

Then, in 2001, ‘broadband’ services began to be introduced in the UK. Broadband would revolutionise the way films would be seen by audiences. This innovation would augment all the previous Internet-technology advancements and lead to high-quality real-time viewing and downloads of online content. This innovation allowed for Mooresque increases in transaction performance with decreases in costs. While download speeds for most consumers had still been around the 56k level by the introduction of broadband, these speeds rose steadily afterwards, reaching 512k in 2004, 1Mbps in 2005, 3.6Mbps in 2008, 7.6Mbps in 2011 and 12Mbps in 2012 (Blantyre Telegraph 2013). As performance increased, costs fell from an average of £24.99 per month for an ADSL connection in 2004, to £17.99 in 2005 and then to £13.61 in 2012 (Ofcom 2009). By 2012, super-fast broadband speeds of 60Mbps to 70Mbps began to be offered, and these systems could handle the highest HD-quality movies.¹³⁴ Together with connection reliability advances in the early 2000s—such as the replacing of copper wiring with fibre optics, faster switching, and more secure WAN performance—a rapidly growing list of Mooresque ‘speed and feed’ advancements in broadband began to have an observable effect on the market.

All of this speed and feed innovation, from a delivery sub-process viewpoint, contributed to an environment that allowed web content providers to thrive. Firms such as LOVEFILM in 2002, YouTube in 2005, Vimeo in 2004, BBC iPlayer in 2007, Amazon Video on Demand

¹³⁴ Through 4G and 5G networks, mobile phone networks were also advancing data transfer speeds during the digital revolution, thus providing another format to distribute film content.

in 2008, and later Distrify in 2011 and Netflix UK (2012), all began during the period and grew rapidly within a content-hungry domestic market (Ofcom 2009). Vimeo, for instance, which started in 2004, began offering users high-definition playback in 1280x720 pixel resolution (720p) in 2007, becoming the first video-sharing site to support consumer HD. Along with innovations in capacity, Vimeo also increased its free account storage limit for uploaders from 20mb in 2004 to 30mb in 2006 and then to 500mb in 2007. Some of these content platforms not only focused on direct exhibition but also began programmes aimed at allowing low-budget producers to gain access to a global market and earn advertising revenue. For example, YouTube was one of the first video-sharing websites to offer content creators the opportunity to earn advertising revenue from their uploaded films, originally limited to a maximum of 15 minutes in length, via the company's AdSense service. British low-budget productions *A New Day in Old Sana'a* (2005), *Next Time Ned* (2008) and *Highlight* (2009) were all exhibited on YouTube by breaking their running times into six to eight 15-min episodes, in order to circumvent the short runtime limit. Moreover, sites such as Facebook, Twitter and YouTube also came to be relied upon extensively, at an early stage, for promotional materials even for more traditional films that would be viewed elsewhere.

The impact of such web-based platforms on the decisions of producers will be explored later in this study, but it is logical to conclude that these innovations helped create the favourable environment for the production expansion noted in Chapter Three. There were, however, other technological innovations that were introduced in the delivery sub-process that might have also indirectly encouraged the sector's expansion. For instance, even though tools such as Dolby Digital EX and 2K digital image projection were already available by the start of the new millennium, the cost of converting a 35mm-based cinema into a digital cinema, or

‘D-cinema’, remained relatively high throughout the digital revolution.¹³⁵ In fact, even up until the late 2000s, most independent theatres could not afford to upgrade their screens to D-cinemas, and even those that could make such an investment had little incentive to do so, since most movies were still being distributed with 35mm prints. Nevertheless, innovations continued, such as 2K to 4K and Dolby Digital EX to Dolby Digital Plus, a trend that enabled the creation of the Digital Cinema Network.

Established in 2005 by the UKFC/BFI, the Digital Cinema Network initially extended to a quarter of all domestic screens and was touted with much fanfare as the first national digital exhibition network (FDA 2005). Since theatre owners were reluctant to invest in D-cinema and few films were being released on a digital format, the UKFC/BFI decided to intervene. Their aim was to have more ‘specialised’ films shown on a ‘regular’ basis, and to achieve this goal Dolby Digital and 2K projection was provided to exhibitors that agreed to screen a wider range of independent, documentary and foreign-language films. The rationale was that by creating an all-digital channel, speciality distributors would be able avoid the costs of 35mm logistics and would instead use the money saved on more marketing. Naturally, the potential of this initiative was not lost on the sector since it offered the first opportunity for producers to work within an all-digital supply chain that included big-screen theatre chains (Shooting People 2005). This potential, however, was never fully realised in the 2000s, since most of the films shown were foreign-language movies and the licensing fees for the Virtual Print Fee model remained prohibitive for those the network had been intended to incentivise (ICO 2012). As such, the network likely did not have any direct impact on the

¹³⁵ In 2001 the cost of converting an analogue screen to one based on digital technologies (including: sound, projection at 2.2 megapixels, then later at 8.8 megapixels, and redecorating) was ~£50k (Arts Alliance 2011). When considering that such a cost was up to five times more than a new 35mm-based system, that there was plentiful supply of reliable pre-owned analogue systems available to purchase and D-cinema technologies were experiencing a high level of innovation and subsequent obsolescence, such an investment was not attractive until most of the distributors stopped using 35mm prints (ibid.).

supply chain, but it did signal the arrival of a digital script-to-screen process that included the cinemas.

4.5 General business tools

Although not directly related to the low-budget supply chain, advances in general business tools, including Microsoft Word, Microsoft Excel and Microsoft PowerPoint, also occurred. These and other tools became more affordable and integrated with each other. For example, spreadsheets could be embedded into Word files and PowerPoint presentations could use Excel graphs. These applications also became more widely used, eventually becoming the industry's tools of choice for creating documents, spreadsheets and presentations; low-cost communication was also made widely available via the Microsoft Outlook application. All of these advances benefited the low-budget producer, and these advantages can be observed in the innovations that occurred in the Microsoft Office product suite. As the overall quality, performance and functionality of MS Office increased, its cost decreased. The retail price for the product in 2000 was approximately £170 (not adjusted for inflation); by the end of the digital revolution, even after the product had been greatly improved, the retail price had remained relatively stable (Table 15). In addition, second-hand licences could easily be obtained at a small fraction of their original retail price. This provided the producer with a valuable productivity tool that did away with many pre-digital-revolution tasks and expenses, such as the use of traditional post. Similar trends can be observed in other business applications for small businesses, such as the SAGE accounting/finance software.

MICROSOFT OFFICE SOFTWARE PROFILE <i>(Innovations, versions and pricing (Amazon.co.uk))</i>				
Product Suite	Rel. Date	Std. Product list	Key advancements	Price*
Microsoft Office 2000	29/03/99	* Word 2000 * Excel 2000 * Outlook 2000 * PowerPoint 2000	Introduction of adaptive menus, greater security features based on digital signatures, greater interoperability.	£169.98
Microsoft Office XP	05/03/01	* Word 2002 * Excel 2002 * Outlook 2002 * PowerPoint 2002	Introduction of Safe Mode features, anti-piracy measures, greater interoperability and production tools.	£159.95
Microsoft Office 2003	21/10/03	* Word 2003 * Excel 2003 * Outlook 2003	Improved functionality, including Kerberos authentication, RPC over HTTP, Cached Exchange Mode and improved junk mail filter.	Free to £145.95
Microsoft Office 2007	30/01/07	* Word 2007 * Excel 2007 * Outlook 2007	Introduction of new graphical user interface called the Fluent User Interface. Improved menus, toolbars and tabbed toolbar, XML-based file formats.	Free to £159.95
Microsoft Office 2010	15/03/10	* Word 2010 * Excel 2010 * Outlook 2010 * PowerPoint 2010 * OneNote 2010	Introduction of a backstage file menu, new collaboration tools, a customisable ribbon, better navigation panel. The first version to ship in 32-bit and 64-bit variants.	Free to £239.99
Microsoft Office 2013	30/01/12	* Word 2013 * Excel 2013 * Outlook 2013 * PowerPoint 2013 * OneNote 2013 * Publisher 2013	Introduction of a new visualisation for scheduled tasks, greater interoperability and production tools.	Free to £179.99
*All information derived from archived webpages from amazon.co.uk. Pricing information not adjusted for inflation and based on the standard software package sold at the time of market introduction (except for MS XP price taken from BMS Software store). Free equates to six-month free promotions occasionally advertised.				

Table 15 - Microsoft Office software profile

Other communication and productivity tools also became accessible during the digital revolution, including Skype in 2003, Google Docs in 2006, WhatsApp in 2009 and FaceTime in 2010, offering further opportunities to avoid once-substantial communication costs while improving efficiency. To go through a detailed list of such software applications would not fall within the scope of this study, but it is still useful to mention them as factors contributing to the positive Mooresque environment previously described in this chapter.

4.6 Conclusions

This chapter presented empirical correlational evidence supporting the hypothesis that a rapidly evolving technological environment provided an important precondition for a rise in low-budget movie production. The chapter set out this evidence by first detailing how the sector consistently invested in the most modern equipment available in an ever-increasing manner. This conclusion was supported by three observations: the observation of how digital technologies began to be used in the image-capture process before 2000; the

observation of how they gained dominance four years later; and the observation of how in 2010 they began to offer low-budget producers 35mm-like image quality on a large scale.

The possible causes of this transformation were next explored by reviewing the frequency and capabilities of new product releases and considering if any changes occurred in the retail prices paid by producers. In effect, this was a tool development audit that measured trends in price-quality ratios, examining performance characteristics that were expected to improve in a Mooresque fashion. The results were: an exponential rise in image capture/processing quality; a parallel decrease in price-quality ratios as the cost for tools stayed relatively the same or lessened (often to zero); and the arrival of a single script-to-screen process based on digital files. Such developments offered low-budget producers' new opportunities to access processes which had previously been unattainable, while at the same time allowed for certain task conflation in the supply chain and new ways to reach audiences.

These Mooresque factors cannot be considered on their own, since they were interconnected and co-dependent with other technological developments. The advancements that offered higher levels of quality in capturing and processing images and sounds are a case in point, since they were mostly achieved in ways that resulted in the tools' becoming more affordable to a larger number of low-budget producers. Innovations that gave cinematographers the ability to capture and process 4k images and high-end stereo sound were being achieved through parallel advancements in miniaturisation, off-the-shelf software, file standardisation and fibre-optics, which together offered improved performance and cost advantages. By the early 2000s a Mooresque environment had developed to the point that a constant cycle of improving price-quality ratios had been established. This was not only based on hardware and software improvements, but also on efficiencies based on an all-digital supply chain that

led to more ways to reduce the time and cost needed. Coupled with the arrival of online distribution channels and the rollout of broadband technologies, in effect low-budget movie producers had gained, for the first time in the history of the motion-picture industry, the real capability to create cinema quality movies and exhibit them directly to a global audience.

In practical terms, low-budget producers gained the option to make their films with smaller crews, using more miniaturised equipment, in almost any place they choose; to manage their projects more efficiently and effectively; to make films that could meet the quality standards needed for commercial distribution; and to promote their projects to a global audience. The juxtaposition of these new capabilities with the increase in output described in Chapter Three not only offers evidence for a growth-from-innovation hypothesis and proof that barriers to entry once prevalent during the analogue era were lessened by digital technology, but also lends support to the views of total empowerment expressed by practitioner-authors (Chapter One). Given the Mooresque nature of the advancements noted, and the capabilities it gave to novice producers, it is understandable why there was great enthusiasm at the time for the idea that anyone could be a filmmaker (Figgis 2007), a can-do attitude which was obviously one of the forces that created the preconditions for production growth and discussions related to how the supply chain process might be affected—a subject that will now be investigated.

5. THE SUPPLY CHAIN: PLANNING & SOURCING

Changes in production output like those presented in Chapter Three are often indicative of adjustments in the manufacturing process and, given the observations noted in the previous chapter, it is probable that the arrival of digital technologies caused considerable disruption to the way the supply chain process operated (Slack et al. 2006). This claim is based on the growth-from-innovation hypothesis and subscribes to the view that a rise in output is not only dependent on a constant flow of innovations into the market but also on the efficient use of those advances. Any attempt to evaluate the low-budget sector must therefore extend beyond a mere assessment of incremental tool improvements and their potential capabilities; it must also analyse the ways in which the use of such improvements might have affected the decisions of producers; the degree to which efficiencies were gained in the supply chain as a consequence of such decisions; and the ways in which those decisions might have influenced the types of films made. This approach should complement the conclusions of the previous chapters by providing a better understanding of how the trends described in Chapter Three might have occurred and to what extent barriers into the filmmaking industry, which were quite high in the analogue era, were reduced by the digital revolution.

To achieve these intermediate research goals, the next three chapters will examine aspects of the UK low-budget film supply chain from the perspective of how it might have been affected by the digital revolution. While the emphasis of this analysis will be on empirical changes that are likely to have been caused by the use of digital technology, other PESTEL factors will also be considered when they have been discussed by other commentators as having influenced the British film industry. This chapter will begin this analysis by focusing on how producers' planning and sourcing decisions were affected by the digital revolution. As accurate data were not available concerning the time and cost of planning and sourcing

tasks per se, this chapter will focus on assessing the decisions related to changes in finance, locations and personnel, for which reliable data were available. The level of influence the public sector had in the sourcing of finance and skills will also be explored since certain agencies have promoted themselves as participants in these areas of the supply chain. This chapter will therefore provide a representation of how these sub-processes changed during the digital revolution, of the causes of those changes and of their possible implications.

5.1 Finance

Before considering key changes that arose in the planning and sourcing of finance, it is worth noting that the low-budget sector is estimated to have spent ~£554m on manufacturing all of its movies during the digital revolution.¹³⁶ This investment constituted ~8% of the total production expenditure by the entire domestic industry. The relative size and details of this expenditure will be discussed in Chapter Seven, but what is relevant for this chapter are: the sources of this investment; how these sources were affected by environmental factors; and whether these sources subsequently affected the efficiency of the supply chain process. For example: did different types of financing become more readily available during the digital revolution and, if so, could this have helped to create an environment for a rise in production? These questions are important and suggest that the performance of long-established sources of finance—such as the public sector, tax credits, PSBs, co-production firms and private investors—should be compared with sources of financing that might have been derived from fundraising tools based on digital technology. To measure the impact of these tools on the sourcing of production finance, it is therefore useful to study how different forms of public-

¹³⁶ Based on the cumulative reported expenditure of £553,620,206 for all the films surveyed in this study (Chapter Two, Appendix A).

sector investment were used, how that performance compared with private-sector investment and whether new technology influenced the finance-sourcing decisions of producers.¹³⁷

5.1.1 Public sector sources: direct, indirect and broadcasters

The public sector has long been viewed as an essential source of funding, and it is clear that it made a substantial investment in UK low-budget production during the digital revolution. This contribution took two forms of what was colloquially referred to in the industry as ‘soft money’: direct investment from public-sector agencies that had a remit to aid the local film industry using a number of different methods, and indirect finance in the form of tax credits from the government. The direct investments were derived from the National Lottery and were managed by organisations like the UKFC/BFI, the national/regional screen agencies (N/RSAs) and Arts Councils charged with promoting British culture. For example, in 2007 there were over a dozen programmes open to low-budget producers with a combined value of ~£7m per year, including the UKFC/BFI’s New Cinema Fund, Film London’s Microwave Fund, the Northern Ireland Film and TV Commission Low Budget Film Production Fund and Scottish Screen’s Content Development Fund (Davies and Wistreich 2007: 395–424).

These agencies invested in 216 out of the 1,451 low-budget films identified in this study (~15%). However, what is further noteworthy is that the percentage of direct investment recipients fell from 25% of the films made annually at the beginning of the century to 10% by 2012.¹³⁸ This decline was not due to any significant reduction in the number of films receiving direct public-sector funding, which remained in the narrow range between 18 and 26 films per year, but simply due to a rise in overall production output (Figures 11 and 25).

¹³⁷ The term ‘production finance’ is defined in this thesis as funds derived from any source that enable the script-to-screen process and that can take the form of investment, loans, distribution advances and guarantees.

¹³⁸ Only films that received support from the UKFC/BFI, the Arts Council, Film Commissions, DNA Films, Irish FC, the Princes Trust, MEDIA and Eurimages. If a film had support from both a public-sector agency and a broadcaster, credit was given to the agency.

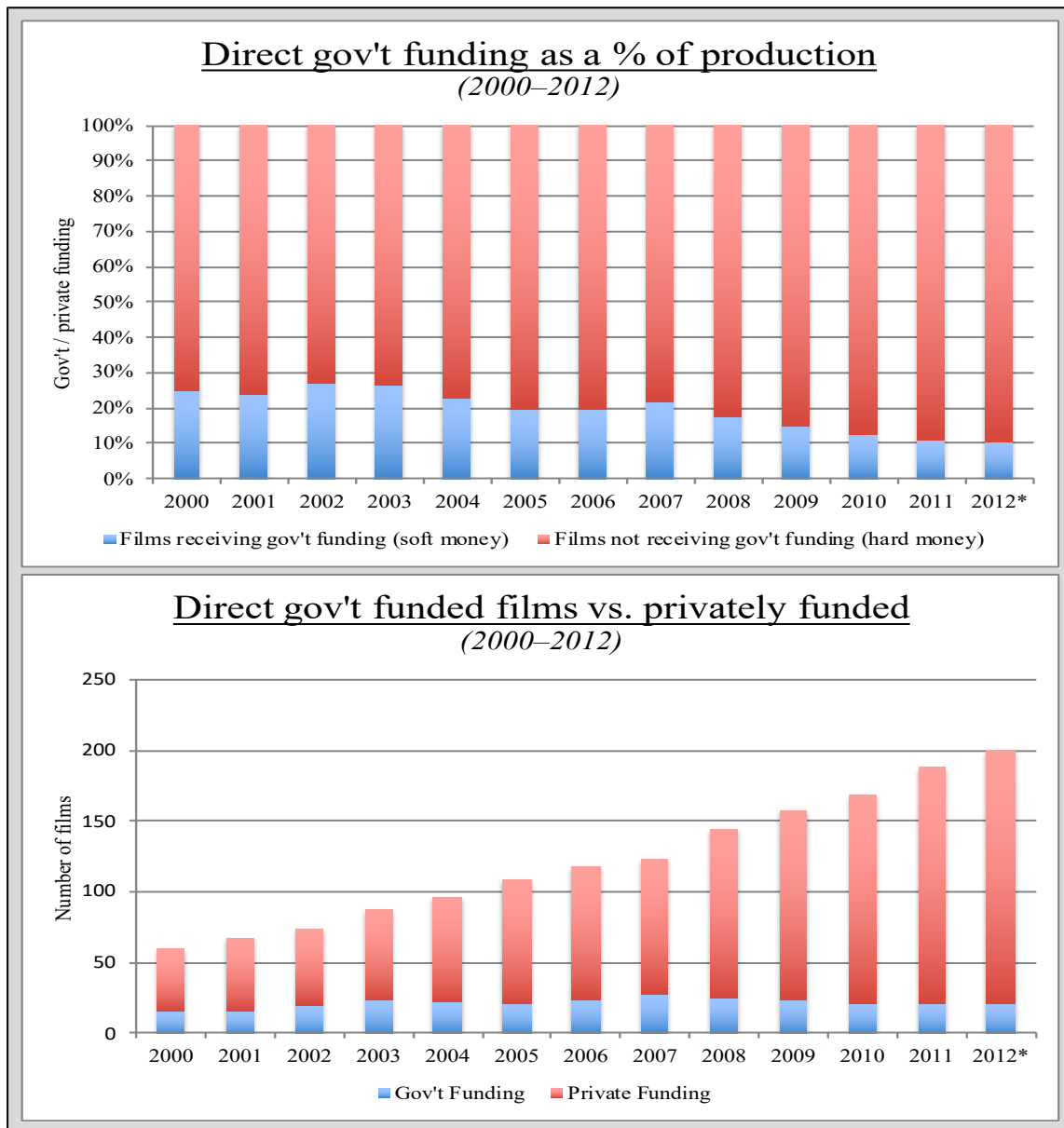


Figure 25 - Public-sector agency funding percentages

In addition to the direct investment from public-sector agencies, the government also offered producers access to indirect forms of financing. These sources were open to all producers, irrespective of the financial size of their projects, but with the proviso that their firms must be registered with both Companies House and HM Revenue and Customs (HMRC), must produce statutory-compliant financial statements and, subsequently to 2007, must also ensure that their projects met the cultural test. Producers could reclaim the value-added tax

(VAT) paid on production and, after meeting further legal stipulations, could use certain Sale and Leaseback options; or after 2007, they could use the Film Tax Relief (FTR) (Davies and Wistreich 2007: 458).¹³⁹ Both the Enterprise Investment Scheme (EIS) and the Seed Enterprise Investment Scheme (SEIS) were also available for investors during the period, but applications were required before the commencement of principal photography. The combined use of such direct and indirect financing sources could be valuable to a low-budget producer, and together could amount to between 15% and 35% of a production budget after legal costs.¹⁴⁰ Yet, despite the relative availability of these indirect sources of finance and their costs to taxpayers, the limited amount of data on the use of these incentives that has been published indicates they had minimal impact on the low-budget sector.

For instance, before the FTR was introduced in 2007, there were two ‘Sale and Leaseback’ options.¹⁴¹ One was Section 48 of the *Finance Act 1997*, which allowed for a 100% write-off for films costing <£15m. The other was Section 42 of the *Finance Act 1992*, which allowed a three-year write-off for films costing ≥£15m. Since producers seldom expected to achieve a profit from which to write off their production costs, they would access Sections 42 and 48 arrangements via Sale and Leaseback transactions. On a national level, these options became popular with some medium-to-high budget producers, as they could yield ~15% of a film’s production expenditure upon completion (Jones and Jolliffe 2006: 142).¹⁴² In 2004, however, Swan Turton LLP estimated that the use rate for Section 42 was averaging

¹³⁹ From the producer’s viewpoint, VAT reclaims can also be considered as state subsidies or sources of finance when the film is not sold. Besides this, the VAT rate was 17.5% from 2000 to 2009 and 20% after 2010, whereas the FTR amounted to 25% of 80% of UK qualifying production expenditure. Also, the FTR was not limited to a specific budget level or to the amount of relief payable within the 80%, but these aspects did not necessarily make it a more attractive incentive to low-budget producers when compared with the replaced Section 48 Sale and Leaseback option. This is because the Section 48 option allowed for a 100% write-off for films that cost <£15m and—depending on the circumstances and the budget—could provide a greater amount of money. Depending on the production, the FTR might offer ~11% to 17% of a film’s final cost to the producer and Section 48 ~9% to 15% (Davies and Wistreich 2007: 458).

¹⁴⁰ Estimate based on the combined use of VAT reclaims and the FTR as per the percentages noted in the previous footnote.

¹⁴¹ The UKFC/BFI published a concise history of the legislation intended to support the British movie industry, including the legislation that was in place during the digital revolution, specifically the *Finance Act 1992* (‘section 42 relief’), the *Finance Act 1997* (‘section 48 relief’) and the *Finance Act 2006*, but does not mention low-budget production in their formation (2015).

¹⁴² It was possible for a Sale and Leaseback to be initiated during the manufacturing sub-process, but this would end up costing the producer another ~2% of the film’s budget (Davies and Wistreich 2007: 458).

~7%, and for Section 48 was averaging ~15%, of the total industry (2004).¹⁴³ Their data did not, however, show the breakdown of what the usage rate was for ≤£2.5m films specifically, and so is not able to either support or undermine PACT's view, mentioned in Chapter One, that Section 48 was 'particularly' effective for 'smaller budget films' (2003: 32).¹⁴⁴

In the data gathered for this study, only three low-budget films were found to have used Section 48: *Capital Punishment* (2003), *Blinded* (2003) and *Captain Eager and the Mark of Voth* (2007). While it is probable that more than three producers might have used Section 48 between 2000 and 2007 (when it was replaced with the FTR), it is improbable that any more than two dozen were used.¹⁴⁵ This view follows from the logic that the legal costs for a Section 48 Sale and Leaseback transaction were likely to be too expensive for films that could not afford a completion bond; it is therefore improbable that the availability of Section 48 had any major impact on the rise in production.

The EIS was different from the Sale and Leaseback options. It was originally created to help firms not listed on the stock exchange to gain private investment, but was quickly adapted by media lawyers to encourage investment in film production companies. These incentives came in the form of tax deductions, helping to reduce the level of risk an investor incurred when investing in a production.¹⁴⁶ After widespread promotion, EISs became popular among high-net-worth investors and were used to finance medium-to-large movies such as *The King's Speech* (2010), *My Week With Marilyn* (2011) and some of the Harry Potter films

¹⁴³ The costs to the Treasury for Sections 42 and 48 in the 2004–05 tax year were £170m and £350m respectively (Seely 2007: 9).

¹⁴⁴ Likewise, no data exists on the FTR, but Oxford Economics did state it 'is vital to sustaining the competitiveness of the core UK film industry ... without the Film Tax Relief, we estimate that the core ... industry would be around 71% smaller' (2012: 7).

¹⁴⁵ The difficulty in estimating a Sale and Leaseback estimate not only stems from a lack of published data on use levels; this also was not information a producer would usually publish. The ~24 estimate is based on the industry average of 15% by Swan Turton LLP multiplied by the 133 films made for £1m to £2m between 2000 and 2007, plus the three films on record (~24 films).

¹⁴⁶ The Enterprise Investment Scheme Association set out five compelling reasons for an EIS from an investor's perspective, the first being a 30% initial income-tax relief, no Capital Gains Tax payable on the disposal of shares after three years, provided the EIS initial income-tax relief was given and not withdrawn on those shares, Inheritance Tax Relief after two years, CGT Deferral Relief and Loss Relief if shares were disposed of at any time at a loss—after taking into account income tax relief (EISA 2013).

(Adler 2012). The investors of low-budget films, including *Cloud Cuckoo Land* (2012), *Charlie* (2004), *Saxon* (2007), *Caught in the Act* (2008), *Messages* (2007), *Clubbed* (2009), *The Deep Blue Sea* (2011) and *Lipstikka* (2012) are also reported to have benefited from this programme. Productions such as these, however, were unusual; only 12 of the 1,451 low-budget films surveyed were found to have used an EIS, a relatively low number that suggests the effort and legal fees associated with the programme might have been prohibitively expensive, complicated and cumbersome for most low-budget producers.¹⁴⁷ Neil Thompson, the producer of *Clubbed* (2009), noted this possibility when he stated that it took six years to put together the film's financing within an EIS (Thompson 2008). Nevertheless, the EIS was key to the twelve low-budget films that did use this financing mechanism, and even Thompson admitted that he still planned to use the scheme in all his future projects (*ibid.*). This mechanism was, therefore, likely useful for a small number of projects operating at the higher low-budget range, even if it does not appear to have been a major funding source for the sector or to have greatly influenced production.

Direct investment by domestic PSBs was also a traditional source of capital for low-budget producers, notwithstanding this type of investment did not happen often enough for low-budget films in the analogue era (McIntyre 1994: 105). During the digital revolution, this source of capital was, in effect, government-supported via the funding it provided to PSBs like the BBC and Channel Four. However, despite the credibility of these organisations, the data gathered for this study suggest that their impact on total output was much less influential than that of the UKFC/BFI and similar agencies.¹⁴⁸ In fact, of the low-budget films surveyed,

¹⁴⁷ The Financial Conduct Authority had stringent regulations for creating an EIS. Thus, the prospectus and other investor correspondences had to be approved by a qualified lawyer. These legal requirements were specialist in nature and could be expensive. When combined with the large amount of sales effort and promotional activities required for the launch of an EIS, the costs could be between £30,000 and £60,000, depending on the complexity of the project (Davies and Wistreich 2007: 138). In April 2012 the British Government announced the Seed Enterprise Investment Scheme (SEIS), but this scheme has not been considered in this study.

¹⁴⁸ Of the films funded by the BBC and Film4 in the government's 2012 Film Policy Review Committee Report ~72% received financial investment from one of the public-sector agencies (FPRC 2012).

only 7% , or 95 films, received any financial support from the PSBs; even if this number were to be later proved higher, it is unlikely that any revised total would match the appeals made in the Film Policy Review Committee’s 1998 report *A Bigger Picture* and in the 2003 select committee report noted in Chapter One (ibid: 55–58, 70–73). These appeals was typified by the UKFC/BFI, who stated to the House of Commons Culture Media Sport Committee that they viewed ‘the lack of contribution’ by PSBs as the ‘single biggest “hole”’ in an effective strategy and that their investment was ‘lamentable’ (CMSC 2003: 41).

In response to these statements, executives from the BBC and C4 stressed that they spent ‘around £10 million’ per year on domestic production, while ITV made it clear that their priority was to acquire the broadcasting rights for studio blockbusters, rather than on production of original content, since they felt that the cost of feature-film production was prohibitive (ibid.: 42–43).¹⁴⁹ This last point is noteworthy because it cannot be justified since the average budget for a low-budget film during the digital revolution was £446k, an amount that was well within the BBC’s production cost limits at the time.¹⁵⁰ Indeed, throughout the period the PSBs did not increase their low-budget movie production, a fact which led the Film Policy Review Committee to suggest that if they did not make real ‘commitments’ to support filmmaking, the government could ‘look at legislative solutions’ (FPRC 2012: 55). Given the total number of films being produced each year, even if the PSBs had substantially increased their own production, such a change would have been minor in comparison to the annual total (Figure 11). That being noted, however, from McIntyre’s view, any addition to the number of high-quality films made each year would have been a positive development,

¹⁴⁹ Film4 produced 17 films surveyed in this study.

¹⁵⁰ The average of £446k will be discussed in Chapter Six, but it is worth explaining at this point that it is an aggregate of all the budgets identified in the census, correlating with the £927,331 average in 2000 and the £168,116 average in 2012. The published BBC tariff prices for independent content production were: £50k to £500k per hour for daytime and low-cost drama, £500k to £700k per hour for lower-to-mid-cost drama, £700k to £900k per hour for mid-to-high-cost drama, £110k to £600k per hour for scripted comedy, £20k to £285k per hour for entertainment, £40k to £300k per hour for factual and lifestyle content, £40k to £350k per hour for performance content, £10k to £60k per hour for daytime factual content, and £50k to £550k for children’s shows (BBC 2013).

since PSB films would have been distributed and made a welcome economic contribution to the low-budget sector (1994: 105).

5.1.2 Private sector sources: crowdfunding, co-pros, presales and private equity

In the later years of the digital revolution, ‘crowdfunding’ began to be touted in the press as an alternative way to independently finance a movie (BBC 2012). The underlying approach to crowdfunding was one whereby producers would bypass traditional private-sector sources by ‘pooling the near-unlimited audiences of the internet’ to obtain small amounts of money each—as little as £1—from large numbers of private investors (ibid.). Although during the digital revolution this idea was often portrayed as a pioneering source of funding, the business concept can be traced back to 18th century Germany, where a subscription-based model called Praenumeration was used to finance the publication of books.¹⁵¹ After the millennium, however, this method was used to finance certain well-publicised movies and documentaries, including *The Iron Sky* (2012), *The Age of Stupid* (2009) and *Da Sweet Blood of Jesus* (2014).¹⁵² The low-budget sector did use this model for some of its productions, including *Outlaw* (2007) and *The Mask of Sanity* (2012), but while this potential financing source was much-heralded at the time, only six low-budget films surveyed were found to have used it.¹⁵³ Given that by 2012, many of the popular crowdfunding tools had been integrated with the all-digital filmmaking process, this meagre total is incongruent with the idea that crowdfunding was an effective alternative way for low-budget producers to finance their movies. Despite these technical synergies and the constant need for investment, there

¹⁵¹ English language sources for this historical context are not consistent. However, for this study, the link to Praenumeration-type models is taken from Darya Baranova and Artur Lugmayr’s paper, *Crowd Intelligence in Independent Film Productions* (2013: 3).

¹⁵² The number of films claimed to be fully or partially funded by crowdfunding has not been estimated, so these examples should only be used as evidence that the crowdfunding method was used during the period. For example, *The Iron Sky* (2012) Timo Vuorensola used wreck-a-movie.com, a website he himself created (Child 2012).

¹⁵³ For *The Mask of Sanity*, Govind Chandran used the Indiegogo platform (Chandran 2011).

is little evidence in the data to support the view that this form of financing was a significant factor in the rise in low-budget production.

To understand the reasoning for this conclusion, the history of the digital crowdfunding phenomenon, beginning during the late 2000s, needs to be reviewed. Like the technical components in the all-digital supply chain, most of the crowdfunding applications, such as Kickstarter, CrowdRise, Wreck-a-movie and Indiegogo, were established on internet-based platforms that were more akin to social-media sites such as YouTube, Facebook and Twitter than they were to venture-capital websites (Barclays Media 2012). These sites were easy to use, inexpensive, and fully integrated with Facebook and Twitter so that they could be used to conduct marketing tasks. Their most important feature was their ability to reach a large number of small investors within a short span of time. The attractiveness of this product feature led to >5,000 producers around the world using Kickstarter to finance their projects in 2012 (BBC 2012). Yet, despite their ease and availability, British low-budget producers did not embrace crowdfunding to any large extent. One reason for this is that these tools were not available during most of the period; for although New York-based Kickstarter began in 2009, it only became available to UK producers in 2012, and while Finland-based Wreck-a-movie was founded in 2009, it never built a domestic market presence.¹⁵⁴ Hence, the small use of crowdfunding there was before the arrival of these tools, such as *The Outlaw* (2007), was based on time-consuming campaigns more akin to the Praenumeration model.¹⁵⁵

Another issue with crowdfunding was that, contrary to popular discourse, they did not appear to be ideal for feature-length film projects. Some insight into this issue was provided by *The*

¹⁵⁴ In fact, Wreck-a-movie had ceased operating by 2012 and Indiegogo was only founded in 2008.

¹⁵⁵ To help fund *Outlaw* (2007) Nick Love and Vertigo Films resorted to selling 44 Executive Producer credits (Brightmore 2006).

Financialist when it observed that crowdfunding campaigns were ‘much more likely to be successful if they tap into a significant pre-existing fan base [and/or] ... fulfil an existing gap in the market’ (Gould 2013). This does not entirely exclude fictional movies, but it does offer a plausible explanation for why documentaries were the most viable productions for crowdsourcing (BBC 2012). This view was also supported by the finding that feature-length fictional film projects on Kickstarter were outnumbered by documentary proposals in 2012 by a ratio of 25 to one, at all budget levels.¹⁵⁶ Thus, there were producers securing funding via these crowdfunding methods, but overall, it had little impact of output levels.

There were also other complications for low-budget producers considering these platforms during this period. The first was the evolving legal status of these sites. In this regard, there were three types of crowdfunding websites: those that used a loan method; those that used a financial investment model; and those that embraced a donation or reward model. In the late 2000s, the regulations governing these sites were fairly minimal, since the Financial Conduct Authority would only begin to tighten the legislation involving how they operated in 2012 (Barraclough 2013). Therefore, before this time the ownership of IPRs were still untested, a factor that would likely have dissuaded the involvement of more profit-minded investors requiring a return. The second complication was related to the success of the websites. As more producers from around the world attempted to use these sites, competition between an ever-increasing number of competing projects also increased, a trend that likely meant it became more difficult for producers without sales-and-marketing skills to compete (ibid.).

There was also no indication in the data gathered for this thesis that co-production and presales agreements were used to any measurable extent during the digital revolution. In

¹⁵⁶ On 20 November 2013 Kickstarter had 4,607 projects listed as documentaries, but only 167 projects listed as narrative films.

fact, only twelve films had listings that indicated they were financed by co-productions in 2000; and of those twelve, four films were listed as having been co-produced in non-EU countries that did not have specific co-production agreements with the UK, especially in the USA. Despite a nearly three-fold increase in production by 2010, in this year there were only 21 co-produced films, and nine of these were listed with companies in countries that did not have specific co-production agreements with the UK. In terms of presales agreements, it is first necessary to explain that this form of financing has usually required ‘bankable talent’ and a completion bond (Jones and Jolliffe 2006: 427). Since only very few low-budget filmmakers could afford the cost of such talent and of a completion bond, one would not expect such presales finance to have been much used. Unfortunately, it was not possible to estimate the number of presales contracts that were secured during the digital revolution from the data gathered, since the relevant data was not published due to its confidential nature. However, even when considering the movies that had bankable talent and could have been bonded, it is also apparent that the use of presales could not have been a factor in the growth portrayed in Chapter Three since most of the growth occurred films made for ≤£500k that were likely not bonded (Figure 18).

Therefore, no evidence was found that suggests that direct public-sector investment, PSBs, co-productions, presales or even crowdfunding methods were underwriting the low-budget sector’s expansion, even though they were undoubtedly useful for a relatively small number of producers.¹⁵⁷ The only other investment source that could have provided the bulk of the ~£554m used to make the 1,451 low-budget films surveyed in this thesis was private equity. Sources of private equity have usually included venture capital, ‘empathy-based donations’,

¹⁵⁷ The use of ‘gap funding’ and other types of production loans were not considered in this study because they are not a form of investment.

self-financing, deferrals and pro bono services.¹⁵⁸ However, before presenting the evidence in support of this assertion, one point of clarification is needed. Only 43% of the 1,451 films identified during the census were found to have verifiable sources of finance, and it is this 43% that shows most producers resorted to private equity to fund the sector's expansion.

Specifically, the data indicates that the public sector provided a level of financial support to 25% of all low-budget films that had verifiable sources of finance, a level equivalent to 15% of all the films surveyed (Figure 26). The PSBs only provided a level of investment to 16% of films with verifiable sources, 7% of all films surveyed. These percentages, however, are likely to be unrealistically high since every film that received a level of funding from the public sector or PSBs also likely had a substantial amount of investment from both private equity and presales. Public sector involvement was easy to identify since producers were required to credit such support in their credit listings; however, even when every movie with any involvement by the public sector and PSBs is excluded, it is clear that most films with verifiable sources of finance were made with private equity. In fact, of all the films surveyed, 359 were confirmed to have been made with private equity only, a figure that represents 58% of those that had a verified source of funding and 25% of all those films surveyed. Private equity investment was therefore substantial and likely the main investment source fuelling the rise in production.

¹⁵⁸ The term 'empathy-based donations' refers in this thesis to money invested by people who do not invest primarily for tax incentives or financial gain reasons and who often invest only small amounts of money (<£10k).

Sources of investment finance
(For UK low-budget films with known sources of finance)

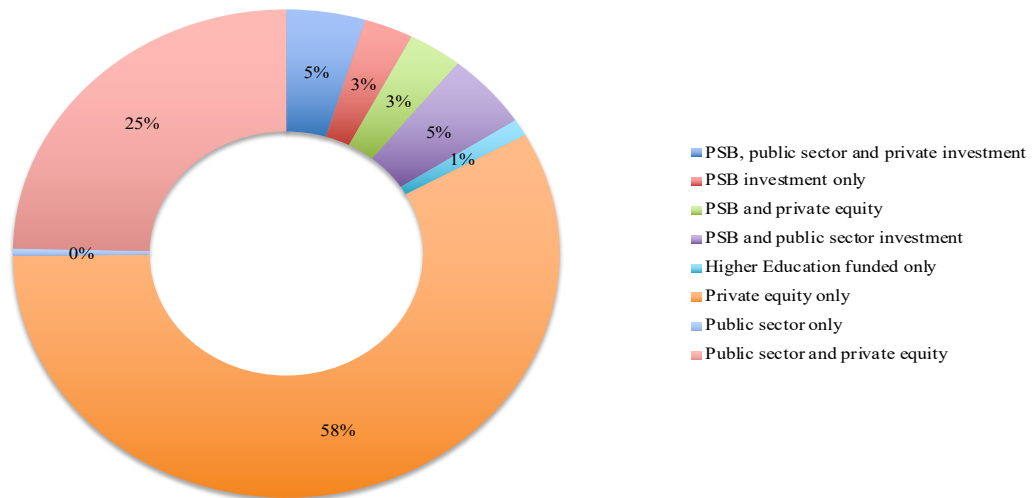


Figure 26 - Sources of investment finance

It should also be noted that this study was unable to assess in more detail the relative split of the ~£554m from a funding sources percentage perspective. While it is not unreasonable to extrapolate from films with known funding sources to all films, to estimate that the makers of ~58% of low-budget movies were likely to have used only private capital to finance their manufacture and to hypothesise that the lower the budget, the more likely it is that a higher percentage of private capital was used, the cumulative value of the private equity used to produce those films is not certain. Additionally, it is not known whether the ~£554m estimate for the cost to make all 1,451 films took the form of money, and how much of the value took the form of deferrals and pro bono services. What is known from the data is that ~7% of films surveyed had producers who publicly stated that their films were totally self-financed. This could be viewed indicative of a sector that is often more concerned with *ars gratia artis* aims than with creating a viable business, but irrespective of how much real money was invested, it is evident that the personal assets, time and effort of an increasing number of private investors was the main underwriting financial resource for the sector.

5.2 Locations

The shooting locations selected by low-budget producers provide another way to measure the degree of change that occurred in the planning and sourcing sub-processes during the digital revolution. As Betts illustrates, London has always been a centre for UK production, but during the digital revolution a much higher rise occurred in the use of locations outside the Greater London Area (GLA) (Betts 1973).¹⁵⁹ This transformation can be seen in the fall of the percentage share of London as a shooting location, from 53% in 2000 to 36% in 2012, despite a rise in the absolute number of films made, from 27 per year in 2000 to 72 per year in 2012* based on the adjusted estimate (Figure 27). This would suggest that the GLA was still attracting production throughout the first decade of this century, but at a slower rate than the rate for the rest of the nation. The reasons for this ubiquitous expansion will be explained later in this section, but it is helpful to note here that the Mooresque developments detailed in Chapter Four were not geographically dependent in the way that the filmmaking process had been during the analogue era. This was because the optimality of London that Betts describes was based on a small number of studios in the GLA that were the only ones that had access to the cameras, sound stages, processing labs and skills needed to make a 35mm movie, advantages that were no longer relevant after the advent of the digital revolution.

¹⁵⁹ The 'Greater London Area' is defined here as the area within the M25 motorway and the adjoining counties.

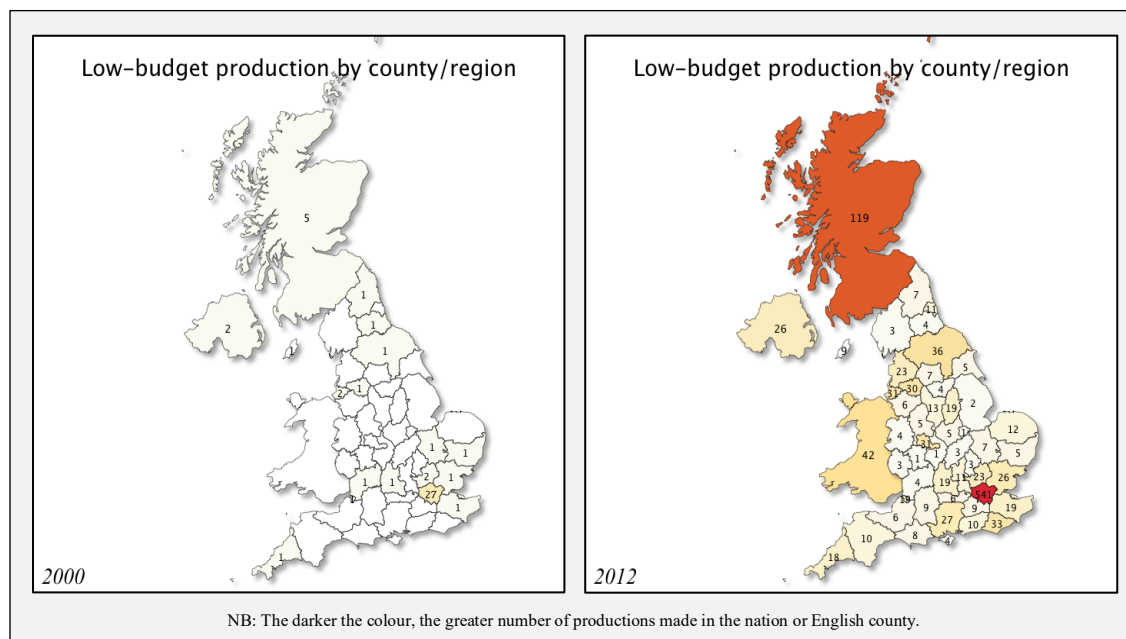


Figure 27 - Cumulative growth in production location by county/country

5.2.1 London as the nation's 'film hub'

Nevertheless, in spite of the faster pace in regional manufacturing, by 2011 low-budget film producers were still making more than three times as many films in the GLA as any other part of the nation.¹⁶⁰ The capital's long-established resilience in holding its number one status is evident from the fact that 42% (541 films) of all the low-budget films made between 2000 and 2012* were shot within the GLA, and with budgets that spanned the entire budget range of the low-budget sector (Figure 27). As a result, the GLA's production base catered to a diverse group of projects, from very low-budget films like *Being Considered* (2000), *Tick Tock Lullaby* (2005) and *I am a Great Man* (2011) to more expensive productions like *Out of Depth* (2000), *Confetti* (2005) and *Demon* (2012). These and the other 535 movies made in the capital not only demonstrate the GLA movie industry's varied base, but also

¹⁶⁰ In 2011, the last year with complete data, London was the location for 41% of the films, Scotland was next with 9% and Yorkshire was third highest with 4% of production.

support McIntyre’s analogue-era view that filmmaking activity congregates in the thickest market (1994: 95–96).

The evidence that London was the UK’s thickest market during the digital revolution is not only supported by the number of films made in the capital, but also by the state of its movie-making economy. In particular, the GLA was the host area for all of the main PSBs, large studios, online content providers, social media companies and online game manufacturers. Organisations like the BBC, Pinewood Studios, Channel 4, Warner Bros, Working Title, E1 and the Moving Picture Company, along with internet-related or social media firms such as Google, Yahoo, Facebook and Twitter, all had a presence there. Thus, at least in terms of economic activity, these and other firms provided the GLA with the densest concentration of cast, crew and facilities in the country.¹⁶¹ The capital was also home to renowned movie-financing companies like Prescience, Baker Street, Barclays Media and Ingenious Media, as well as to charities and unions such as BECTU, the Producers Guild, PACT and the British Academy of Film and Television Arts (BAFTA). London was also the thickest market based on the more than thirty educational institutions that formed the largest centre for movie skills training. Institutions such as the National Film and Television School (NFTS), the London Film School (LFS), the Met Film School, the London Film Academy, Goldsmiths, Royal Holloway and Straight Curve not only helped train a new generation, but also fostered the necessary preconditions that resulted in the production of the 541 films made in the area.

Admittedly, the evidence that supports the assertion—that the proximity of these GLA-based establishments fostered the production of 541 low-budget films—is circumstantial, since a

¹⁶¹ Oxford Economics stated most of the jobs were located in London and the South East. Specifically, ‘26,300 jobs (incl. self-employed), or 55% of the total workforce, were in London, with a further 5,800 (12%) in the South East’ (2012: 31).

detailed study of the producers and their backgrounds was not undertaken. However, the capital's role as the main low-budget production centre for the nation during this time offers some evidence to support McIntyre's view that the GLA provided producers with more benefits than the rest of the country (1994: 97). This is based on the theory that independent production firms are more likely to prosper when they have access to the indirect benefits derived from being in close proximity to the largest movie economy (ibid.). For example, London-based producers likely had a larger skill pool for cast and crew and a higher level of interaction with other producers than their counterparts in the rest of the country, which could have enabled them to undertake more collaborations. Indirect opportunities such as these, therefore, suggest that the thickest market theory is a plausible explanation, along with London's largest population, as to why the capital remained the largest filming location.

At this point it is also worth noting the role that was played by Film London in fostering the production of the 541 films. This agency was charged with promoting London-based film production and, as already noted, a direct investor. Although the number of films it supported was not large in comparison to the output of the sector, it was able to assist a small number of movies that might never have been made without its support, including *Mum and Dad* (2008), *Shifty* (2008) and *The Burial* (2009).¹⁶² The agency also co-sponsored the single largest annual movie festival event in the UK, the BFI London Film Festival, which has been held every October with more than 300 screenings, and dozens of educational seminars, many of which were aimed at improving independent production. The agency also funded outreach and mentorship programmes to encourage interest in the movie industry and help ensure the next generation finds access to the capital's considerable filmmaking resources.

¹⁶² Success in this case being that all three of these films were accepted in film festivals and received a commercial distribution.

5.2.2 Regions and international

London's continued position as the low-budget sector's most-used location does not negate the fact that more movies were being made in other parts of the nation, and that altogether this production was growing at a faster rate. The seemingly everywhere nature of this expansion can be observed in the geographic data gathered for this study, which indicates that 47% of low-budget movies were made outside the GLA in 2000, but that by 2012* this percentage had risen to 64%.¹⁶³ This growth involved the production of 860 films outside the GLA over the twelve-year period (Figure 27). To speculate as to why this rise occurred, it is helpful first to consider the role national and regional screen agencies (N/RSAs) played in fostering higher levels of regional production.

During the digital revolution, the N/RSAs were tasked with the specific role of encouraging production in their respective parts of the country. Aside from their training programmes, some of which will be discussed later in this chapter, they did this via a disparate set of programmes that can be loosely categorised into promotional activities such as the Film in Wales campaign, and direct financial investment initiatives such as the Scottish Screen's New-Found Film programme. Such initiatives were similar to the ones used by Film London, and resulted in a small number of productions being made in the regions that would otherwise not have been produced. Films that received this type of support included Scottish Screen's *Night People* (2005), *GamerZ* (2005), *Red Road* (2006) and *Seachd* (2007), the Arts Council of Wales and the Wales Screen Commission's *A Way of Life* (2004), *Daddy's Girl* (2006) and *I Know You Know* (2008), and Northern Ireland Screen's *Hunger* (2008), *Pumpgirl* (2009) and *Beyond the Fire* (2009). Regional low-budget films also received financial support from the UKFC/BFI; in fact, the UKFC/BFI was the single largest co-

¹⁶³ Based on 48 English counties (incl. Greater London and the Isles of Scilly), plus the countries of Wales, Scotland and Northern Ireland.

producer in regional production, having supported 33 films made outside the GLA, including such films as *Reveners Tragedy* (2002), *I Want Candy* (2007) and *That's for Me!* (2009).

While undoubtedly the investment provided by the N/RSAs and UKFC/BFI was appreciated by the producers involved, in numerical terms their combined efforts were evident only in the credits of 3% of the 860 movies filmed primarily outside the capital.¹⁶⁴ Therefore, the data suggests that the backing made by the N/RSAs was not likely to have been a major catalyst in the rise of films made outside London. This does not mean that the activities of, and programmes provided by, the N/RSAs were not effective or good value for money. The data, in fact, suggests the critical success of their films and the promotional tasks they performed clearly helped to inform the industry of the production possibilities in their regions. Nevertheless, the fact that most films made in the regions outside the GLA—like Dorset-filmed *The Season of the Witch* (2009), West Midlands-based *Schrodinger's Girl* (2009) and Merseyside-based *The Temp* (2010)—were privately financed again reinforces the view that public-sector direct investment was not a major factor in encouraging production or regionalisation.¹⁶⁵

The modest number of international co-productions also seems to suggest that the use of these agreements was not a factor in a rise of output outside the capital, since the number of such films did not increase as fast as the rate seen in regional domestic production. While it is evident that the number of international productions did rise from nine to 24 films between 2000 and 2012*, it is certain that this was not a result of any increase to use co-production

¹⁶⁴ This estimate was based on an acknowledgement in the credits—for example 'with the assistance of' or 'executive producer'.

¹⁶⁵ It is likely that a small minority of regional producers did avail themselves of the FTR. In fact, in the case of films supported by the N/RSAs, the producers were probably required to do so as part of their assisted production process, and for this reason it is realistic to estimate that ~3% claimed the FTR. Of course, this estimate contrasts with Oxford Economics overall industry view, and therefore highlights a difference between the sector and the rest of the domestic industry (2012: 7).

agreements (Figure 28). The prohibitively high cost needed to establish a legal co-production company was likely a factor in this case. For instance, films such as the Tunisian co-production *Siren* (2010), the partly-made-in-Australia ballad of *Des and Mo* (2010) and South African-linked *Reuniting the Rubins* (2010) are all listed as co-productions in the sources used in this thesis but are likely—because of their low production budgets—to have been made without using a legally recognised co-production structure. Besides this, 23 films were identified as co-productions with films in the United States, a country where no inter-government agreement existed.

UK Low-Budget Film Co-Production Countries 2000 – 2012

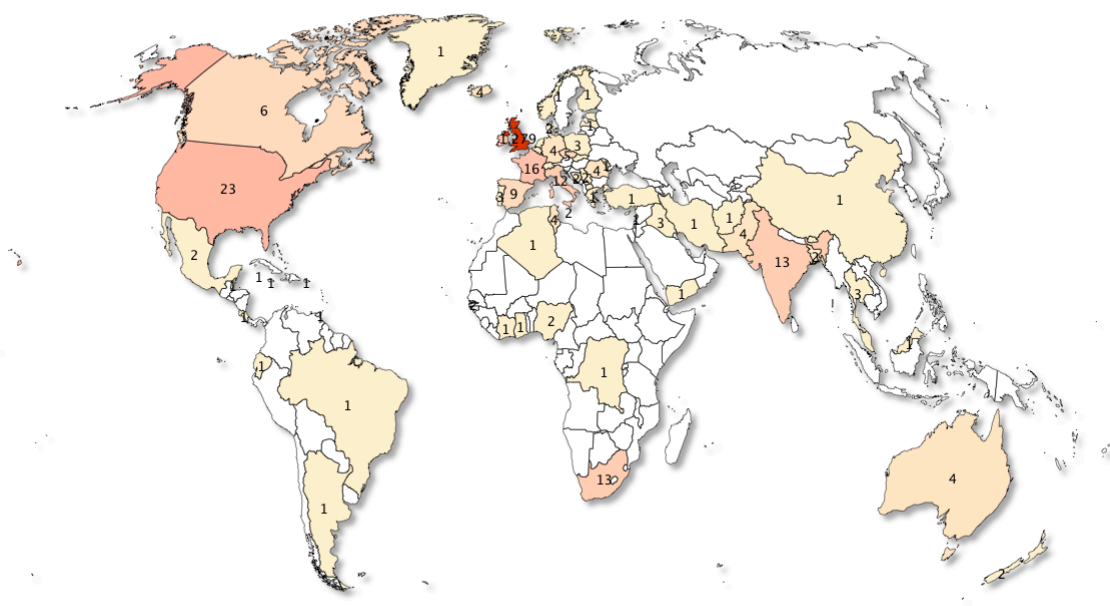


Figure 28 - Cumulative production in international locations

5.3 Cast and crew

While it was not logistically possible to measure the hiring decisions producers made for all the movies included in this research thesis, it was possible to survey the various skills-development initiatives that existed at the time, and to discuss possible ways in which new

technology might have influenced their delivery, helped create the environment that led to the regionalisation just described and contributed to the overall increase in production. To assess these factors, it is necessary to contextualise the education market aimed at providing moviemaking skills during the period and the role played by the public and private sectors.

Producers need workers who are skilled, motivated and talented to make movies, and for an industry to produce these kinds of individuals it needs to attract people constantly to join its ranks by offering them good training, facilities and educational resources. The UKFC/BFI recognised this need at the beginning of the digital revolution and developed a coordinated filmmaking training strategy (Skillset 2009).¹⁶⁶ The delivery of this plan was a considerable undertaking that entailed the setting up of hundreds of courses around the UK, yet it was not done in an environment devoid of other independent initiatives. The number of educational institution programmes not supported by the National Lottery also rose during this time, as did specialist tool training provided by the camera and software makers, and privately funded initiatives that improved access to skills. Although these programmes were developed separately, the majority of them were based on vocational training courses relying on digital technology; this resulted in an increase in filmmaking skills throughout all parts of the UK.

5.3.1 Public sector supported training

The government's role in developing these skills is especially relevant to the sourcing of cast and crew in the low-budget supply chain. This role was first set out in the already mentioned speech, 'Building a Sustainable UK Film Industry' where Parker stressed the need for more and improved training in an effort to establish a more competitive and sustainable domestic

¹⁶⁶ The context and purpose of this strategy is detailed in 'Creative Industries and Skills: Film Education and Training in the Era of New Labour,' where Petrie argues that they were rooted in an 'advocacy of a primarily market-oriented imperative (rather than the concept of cultural value or social good)' in an effort to promote Britain's 'creative industries' instead of the 'arts' (2012: 357).

industry (2002: 8). He did this by first accusing the British movie industry of ‘scandalous neglect’ in training its filmmakers and stressed that this situation had to be rectified before it could become a ‘confident player’ in the global motion-picture industry (ibid.: 2, 6).¹⁶⁷ To rectify this issue he then pledged the UKFC/BFI to the production of ‘a coherent training strategy for film, organised at the centre, but delivered at ... establishments all around the country’ (ibid.: 12).¹⁶⁸ Even though it would take a committee chaired by Stewart Till another year to publish the details of this vision in their *A Bigger Future*, the results of the programme suggest that Parker’s pledge was largely realised (Skillset 2004).¹⁶⁹ Unlike earlier attempts, *A Bigger Future* was reasonably funded by an annual grant from the National Lottery (~£7m) and the yearly proceeds from the Skills Investment Fund (Skillset 2009b). In partnership with industry and with educational institutions, the plan was managed by Skillset and resulted in a ‘national network of Screen Academies’ that, in turn, delivered ‘an agreed mix of creative and commercial skills’ (ibid.).

These institutions would later be reclassified as either film academies, media academies or film and media academies.¹⁷⁰ The three principal ones for film were the Screen Academy Scotland at Napier University (est. 2005), the London Film School (LFS est. 1956, but began to receive Skillset support from 2005) and the National Film and Television School (NFTS est. 1971, but became a Skillset Film and Media Academy in 2005). Twenty-one further

¹⁶⁷ Parker would go further in his unflattering description of the UK’s training facilities by stating ‘We’ve a National Film and Television School out at Beaconsfield which looks like an abandoned set from *The Day of the Triffids*, and some good, but seriously under-resourced film courses at Leeds, Bournemouth, the London Film School and elsewhere’ (2002: 12).

¹⁶⁸ The skills issue had already been highlighted in *A Bigger Picture* (1998). Not only did this report note several skill issues and provide the basis for creating a national strategy, but it also recommended the introduction of the Skills Investment Fund that would be voluntarily financed by local productions. The fund was set up the following year with an annual intake of ~£700k and it was with this money that Creative Skillset was able to invest in the training needs of the industry. However, the legacy of this strategy is debatable since funding cuts after 2008 reduced the number of institutions it supported, the lack of involvement of higher education institutions, the focus on vocational training instead of also attempting to foster the development of creative ideas being issues raised (Petrie 2012: 357–376).

¹⁶⁹ The *A Bigger Future* strategy encompassed four main strands: careers information and advice; further and higher education (vocational); training for new entrants, professional development for industry practitioners and support for companies; and research and labour market intelligence. It should be noted that one of the ‘golden thread’ objectives in *A Bigger Future* was the need to recognise ‘the importance of fully understanding and addressing the potential of new digital technology’ (Petrie 2003: 29).

¹⁷⁰ It should be noted that during the period a rising number of institutions claimed the designation ‘film school’ (Petrie 2012: 359).

screen and/or media academies were to be supported, such as the Bournemouth Skillset Media Academy (est. 2007), the Skillset Media Academy Wales (est. 2005), the Screen Academy at the London College of Communication (LCC) and the Ealing Institute of Media. Unique among these was the Film Business School at the Cass Business School London (est. 2006, closed 2010). Overall, this network ultimately became 23 accredited academies, 11 screenwriting courses and a Craft and Technical Academy.¹⁷¹

However, as good as these academies were at teaching the vocational skills needed for making films, their educational methods included the attainment of degrees, diplomas and certificates. These types of provisions were undoubtedly ideal for higher and further education students but were not always suitable for those who might only be interested in vocational training. However, *A Bigger Future* also dealt with this issue by offering, through Skillset, over 300 short courses and apprenticeships, covering almost every task in the supply chain (Skillset 2009). Some of these non-academic courses were conducted in Skillset academies, while others were held at non-Skillset accredited institutions in locations not served by the academy network. For cases in which individuals or firms required project-specific training, grants were also made available for specialist education delivered by independent firms.¹⁷² Grants of this nature were usually awarded on the merits of a project and were used for developing a script or distributing a movie. The Script Factory, with its master classes and custom script appraisal services, was one such organisation that provided this type of training and was often used by producers.¹⁷³ British creative teams also had the option of applying for funds via the European Union's MEDIA programme (MEDIA Plus

¹⁷¹ The British Universities Film and Video Council was government funded but focused on supporting higher-educational institutions' use of the moving image and not on filmmaking training. Thus, its work has not been included in this analysis.

¹⁷² The UK-based script development group Euroscript was one example of an institution that provided this type of training. Although a private organization, students could apply for Skillset grants up to £500 for this type of training (course fees and travel) (Skillset 2009).

¹⁷³ The Script Factory was originally set up in 1996 to help support British writers develop their scripts through consultancy and education. In 2012 its National Lottery subsidy was cancelled, but it continued to provide individual project script development consultancy.

[2001–2006] and MEDIA [2007–2013]). While similar to the project-based training just described, these courses would often have strong co-production content that made them ideal for projects intended for European audiences.

As well as the training co-ordinated by Skillset and the MEDIA programme, the UKFC/BFI also nurtured a passion for filmmaking in young people with a set of initiatives managed by Skillset Careers, Filmclub and First Light Movies. While not a training school per se, Skillset Careers was an advice service that put young people in contact with practising professionals to help them become better acquainted with the career options that existed. This programme was relatively successful to the extent that it was able to create a comprehensive website, and facilitated over 800 one-on-one career advice sessions (BOP Consulting 2008: 7). Although it is not known how many people went on to have a career in the industry after attending one of these sessions, it is known that two other UKFC/BFI programmes intended to encourage young people to become more engaged with movies were introduced during the period. Filmclub's part in this endeavour was to give children greater access to cinema and, as a result, to increase the number of British film enthusiasts. Here, too, it seems that progress was made, with the establishment of ~7,000 Filmclubs around the UK that helped >50k young people to be more engaged with British cinema (Skillset 2009).

For those young people who were interested in a 'hands-on' experience, the activities of First Light Movies began in 2001. This initiative allowed young people to gain some of the skills needed to make 'high-quality' short films, eventually training 5,000 people per year between the ages of 5 and 25 (First Light 2013). Despite the early age and elementary skills of the students, this was a sizeable addition to the UK's training efforts. Indeed, it may have led to a greater number of skills being made available to the low-budget sector towards the

later years of the digital revolution. Though no evidence was discovered to support this view or to link any First Light student with any production, it is plausible that these programmes may have contributed to the rise in the number of students taking media and film courses at BTEC, A Level and at university (Williams 2010).

5.3.2 Private sector supported training

A number of non-Skillset-supported schools and private initiatives also contributed to a rise in training. Private institutions like the London Film Academy (est. 2001), the Brighton Film School (est. 2001), the Met Film School (est. 2003), the Central Film School London (est. 2008) and the London School of Film, Media and Performance (est. 2009) were all founded after the start of the millennium and were, by 2012, training over 500 students every year.¹⁷⁴ By 2005 the Anna Florentini Theatre and Film School (est. in 2001, for students aged 4–18) and the Straight Curve Film School (est. 2001, for students aged 11–16) were training 75 students annually, and in 2009 Pinewood Studios began supporting apprentices. Growth in the number of private institutions was also augmented by a rise in students taking Film and Media Arts university degrees (Shepherd 2012). In 2013 there were 62 UCAS-registered universities and higher education institutions teaching 143 undergraduate and graduate film-production degree courses, a 67% rise from the number of courses in 2000 (UCAS 2013).

Tool manufacturers may have also helped to broaden and deepen the UK's filmmaking talent pool during the digital revolution. Adobe, Avid, Apple, Panavision, Arri and RED had by 2007 all provided accessible training on how to use their products. For instance, Adobe, Avid and Arri sponsored training with many of the Skillset and non-Skillset institutions.

¹⁷⁴ The London Film School was a private institution financially dependent on government-sponsored students and for this reason has been included in this analysis.

Although it is likely that much of the cost of this training had already been included in the £70m in private-sector funds that Skillset had leveraged (FPRC 2012), a substantial portion of the training was carried out as part of marketing campaigns aimed at improving brand loyalty. Apple and RED used this approach quite successfully, and on occasion collaborated on joint workshop and seminar programmes. Free educational seminars and workshops on Final Cut Pro, as well as on other third-party applications and cameras, routinely took place within UK Apple retail stores, which themselves constituted a sizeable training initiative in their own right. While Apple hadn't opened its first European store in London until November 2002, by 2010 it had 37 stores in 32 UK cities from which training was conducted. With each store containing at least one workshop facility and/or offering 'one-to-one' training service, over 1,500 hours of filmmaking tool education were delivered every year to British participants on major tools such as Gorilla Software (pre-production), Final Cut Pro (post-production), Canon cameras (image-capture), GarageBand (score), Final Draft, Moviestorm and Adobe.¹⁷⁵ Apple's stores also routinely conducted popular 'meet the filmmaker' events, which provided numerous opportunities for filmmakers to network.¹⁷⁶

Other training initiatives by other organisations also deserves mention. Shooting People, which was started in 1998, was a unique example in this case. Originally a free, email-based group chat service for 60 low-budget filmmakers in and around London, by 2013 Shooting People had become a network of over 38k members and 200 production firms who used its internet-based services every week. Its services had expanded to include easy and affordable access to an 'ask any question' email bulletin, a forum for posting cast and crew calls for low-budget projects, a large filmmaker database and events listing. Other groups, such as

¹⁷⁵ Estimate derived from Apple Store event notices in 2011.

¹⁷⁶ For example, the Apple Store in London held sessions with Baz Luhrman (*Australia*) on 05/01/09, John Lasseter (*Cars 2*) on 22/07/11 and Tom Hooper (*The King's Speech*) on 22/02/11.

Raindance, the NPA, Imaginox Online Film lab (est. 2009) and the Writers Store (1993) also provided some of these same services to varying degrees. Raindance, in particular, played a key role in nurturing British independent filmmakers. Begun in 1992, Raindance not only offered training, but it also provided social media and online resources, as well as the Raindance Film Festival and the British Independent Film Awards. Through its school and festival, it held hundreds of seminars and networking events throughout the digital revolution, and by 2013, both it and the NFTS had impressive lists of alumni.¹⁷⁷

As a result of all these activities, training and resources became more widely available and less expensive for the low-budget producer during the period. However, what is not certain is what impact these activities had on producers when attempting to source cast and crew. Other than empirical observations, this is not an easy question to answer, since no studies were found to have measured the return achieved from these programmes. The NFTS, for example, states that its success should be judged ‘not ... by how many of our graduates get jobs, but rather by what and how many awards they win and by the audiences their films ... attract’ (2013). This standard may be an appropriate way to assess an institution established in 1971, but as to whether Skillset’s efforts led to the creation of more low-budget films, a more definitive answer requires a different approach. Fortunately, Skillset’s contributions to broadening the vocational workforce in ways that were directly relevant to low-budget film producers can be measured. This is because the original Screen Academies were able to grow the nation’s film-training intake by ~2,100 students, or ~39%, between 2004 and 2012, by awarding them Skillset support.¹⁷⁸ This was accompanied by an additional total of ~19k training sessions, and £7.0m in matching funds leveraged from the industry (FPRC

¹⁷⁷ Raindance alumni includes: Sacha Baron Cohen, David Yates, Edgar Wright, Matthew Vaughn, Alison Owen, Guy Ritchie, Ben Miller, Christopher Nolan, Kirk Jones, Mark Mahon, Emily Lloyd, Vadim Jean and Nick Hornby (2016).

¹⁷⁸ Estimates for 2005–2012 were derived from the individual websites of the three schools. Screen Academy Scotland lists 300 graduates, London Film School lists 250 alumni profiles and the NFTS gives 220 as their yearly student intake. In total, ~2,100 graduates estimated.

2012). Non-Skillset-supported universities and private institutions also increased their intake, by ~27%, to ~3,200 graduates.¹⁷⁹ Therefore, though this sizable increase in training programmes does not offer a direct evidence-based link that a rise in training opportunities contributed to a rise in low-budget film production, it does suggest that producers gained more personnel options and that the underlying skills in digital filmmaking were in place in sufficient numbers to support the rise in location regionalisation and overall output.¹⁸⁰

5.4 Conclusions

This chapter presented evidence that over the course of the digital revolution, a considerable transformation occurred in the low-budget supply chain at the planning and sourcing sub-process level. The main findings were: a rise in sourcing private equity financing; an increase in the regionalisation of filming locations; and the probability that a nation-wide expansion of the skilled filmmaking workforce had occurred. This chapter further presented evidence that these changes were either directly or indirectly caused by the innovations noted in Chapter Four and led to low-budget producers having more and better options when sourcing their financing, locations and personnel. These findings also suggest that these trends signalled a more regionally diverse output of films and a lowering of certain barriers to entry that had previously inhibited production during the analogue era.

The chapter began with the finding that the investment levels from long-established sources, particularly the UKFC/BFI, N/RSAs, PSBs and co-productions, remained low in actual numbers as total production increased. No evidence could be found that the arrival of online

¹⁷⁹ These estimates were obtained from the student lists published from 2005 to 2012 on the websites of the institutions mentioned.

¹⁸⁰ There are three reasons why it is not possible to conclusively prove a link between a rise in movie training with the rise in low-budget production. The first reason is partially due to the high number of foreign students in the screen academies. The second reason is that many of the Skillset beneficiaries might have gone on to work in other media industries (television, advertising or Internet). Finally, it is of course possible that a high proportion of students may have dropped out of the industry before securing a job.

crowdfunding platforms had any effect on the investment decisions of producers or on shaping output levels. It was then noted that 58% of the ~£554m estimated cost of making the films surveyed was from private equity. The next set of findings related to the planning and sourcing of locations. In particular, it was found that the GLA continued to be the main film hub of the nation based on the actual number of films made, and a rise was found, from 47% in 2000 to 64% in 2012, in the use of shooting locations outside the GLA. The final set of findings that were presented related to the planning and sourcing of personnel, but since specific hiring decisions were not able to be measured the level of skills training was used as a substitute measure. This survey indicated that a significant expansion in the number of skill development opportunities occurred during the period; based on the establishment of 23 accredited academies, 300 independent courses, 12 higher education programmes, ~7,000 film appreciation clubs and other public-sector-funded initiatives in all parts of the country.

To explain the most probable reasons why low-budget producers increasingly resorted to sourcing private equity and regional locations, it is helpful to consider to the growth-from-innovation theory and the Mooresque innovations that became widely available during the period. With the advent of affordable tools that could emulate 35mm-level quality and were portable enough to be used by small crews in almost any location, it no longer became necessary for producers to be based in close proximity to London in order to more readily obtain the investment, tools and skilled personnel they needed. One plausible explanation for the rise in private equity is that a general fall in the Minimum Production Cost defined in Chapter One occurred over the period. Additional statistical evidence for this possibility will be provided in Chapter Six, but at this point it is not unreasonable to consider that the arrival of HD-quality cameras for <£1k may have reinforced in the minds of producers and investors the view that anybody could make a film (Figgis 2007: 2). This perception would

have theoretically made it easier to raise the minimum funds needed to make a low-budget film, in particularly for \leq £500k productions, since it offered a convincing argument to entice new investors to enter the market based on the new sales propositions of a lower investment threshold derived from a lower MPC, the potential to avoid selling any IPRs before distribution and the option to self-distribute if required (Chapter Six).

The Mooresque innovations that occurred during the digital revolution undoubtedly also gave the UKFC/BFI the means to become more efficient when implementing their skill development programme, since the lower costs for high-quality tools should have resulted in lower costs for training environments and allowed budgets to be used to greater effect in more locations. Of course, it is speculation to argue that if the *A Bigger Future* strategy had been attempted during the analogue era it could not have established as many media academies and independent courses; nevertheless, the arrival of an all-digital script-to-screen workflow that could be demonstrated in a single room for less capital costs than earlier 16mm-based training environments must have been an influential development. This does not negate the public-sector's considerable investment into what was clearly an expansion in digital filmmaking skills and, likely, an expansion in the workforce, but it remains implausible that results of this magnitude could have been achieved in the analogue era.

Combined with increased opportunities to attract private equity and hire skilled personnel outside the GLA, analogue-era barriers to entry described by McIntyre concerning access to capital, a prohibitively high MPC and limited access to appropriately skilled personnel were no longer inhibiting production to the same level as before. As a result, low-budget producers were increasingly able to base their operations, fundraise and make their movies in places like Devon, Edinburgh, Belfast, York, Cardiff, Newcastle and Liverpool—all locations that

had once been much less advantageous than London in which to make a low-budget feature-length movie. This trend also contributed to a greater regional diversity in narratives since being based outside the GLA allowed producers more opportunities to make more region-specific stories (Chapter Seven).¹⁸¹ Indeed, low-budget filmmaking had become more pervasive and diversified in its locations and workforce, and the low-budget sector therefore no longer had to solely depend on a ‘thick market’ for sourcing finance and skills. Instead, this was a situation that opened up new possibilities for the sector and the industry, and helped create the necessary preconditions for the transformation discussed in Chapter Three.

¹⁸¹ For example, *The Space Between* (2010) was made and its story was set in Edinburgh, *Boxed* (2002) was made and its story was set in Belfast, *The Bike Thief* (2005) was made and its story was set in York and *The Feral Generation* (2007) was made and set in Cardiff.

6. THE SUPPLY CHAIN: MANUFACTURING & DELIVERING

Chapters Four and Five provided correlational evidence that the digital revolution had a profound impact on the low-budget moviemaking process, and that its effects included an increasing reliance of film producers on private equity investment and regional production. However, these were not the only effects on the supply chain. As already noted, the digital revolution also made possible a more integrated script-to-screen process, one that offered an improved set of production and delivery capabilities. This situation not only gave producers the opportunity to create images of a quality comparable to that of 35mm film, but also offered them the capability to improve the efficiency of their supply chains. In economic terms, this meant that prospective producers could now make studio-quality movies, with more streamlined workflows, at cost levels that were no longer prohibitive. This situation was a cornerstone of the proposition made by practitioner-authors and, as a result, a growing belief that digital technology made filmmaking easier was likely one of the reasons more speculators entered the market (Chapter Five). However, if a growth-from-innovation hypothesis is to be confirmed as explaining the rise in output detailed in Chapter Three, it must be shown not only that there were opportunities for higher efficiency and lower costs, but also that these opportunities were realised in the production and delivery sub-processes.

Fortunately, it is possible to identify and measure whether producer decisions at these two stages of the supply chain process were affected by the introduction of digital technology since production factors such as characteristics, efficiency and cost can be quantified. Analysis of these factors is relevant at this point since it provides statistical evidence that can be used to confirm a growth-from-innovation hypothesis and provides a further level of understanding on the degree to which analogue era barriers to entry might have been made less relevant at the time. For these reasons, this chapter will include an attempt to measure

three aspects of the manufacturing and delivery sub-processes in the supply chain: the average time taken for manufacturing and delivery, and whether producers achieved any time efficiencies; the average production cost, and whether producers gained any cost efficiencies; and ways in which producer decisions might have been affected.

6.1 Duration estimates

With the advent of a more integrated all-digital workflow process, low-budget producers would have an opportunity to reduce the amount of time spent on the manufacturing and delivering sub-processes of their productions. Over the whole digital revolution, the time required for principal photography for low-budget films had a mean of 4.9 weeks, with a mode of 4.0 weeks.¹⁸² There was fluctuation in the annual averages; at one point in 2002 the mean shooting time rose to 7.1 weeks, while in 2011 it fell to 3.5 weeks. However, the trend can be smoothed out by using wider time-intervals. When three-year intervals were used, the mean shooting time dropped from 5.6 weeks for the 2000–2002 period to 4.2 weeks for the 2009–2011 periods, a decrease of 25% (Figure 29). In addition to the earlier finding that the low-budget film sector largely migrated to digital technology over the period, the movies that provided the data for these trends also offer some comparative analysis in support of a growth-from-innovation hypothesis. For example, at the low end of the budget range, *Rituals of Fire* (2000) and *Freestyle* (2010) were both made for ~£100k, but *Rituals of Fire* used 16mm analogue technology and took 12 weeks to film, whereas *Freestyle* used the Red One and it took only three weeks to shoot.¹⁸³ A similar result was found at a higher-budget level with *Day of the Sirens* (2002) and *Bunny and the Bull* (2009), both costing ~£1m to make,

¹⁸² This trend analysis is based on verifiable data from 301 films with published production times of the 1,451 films identified in the census.

¹⁸³ Data on *Rituals of Fire* and *Freestyle* came from the British Council Achieve (2012).

but *Day of the Sirens* was shot with 35mm analogue technology over 16 weeks and *Bunny and the Bull* took only five weeks using High Definition.¹⁸⁴

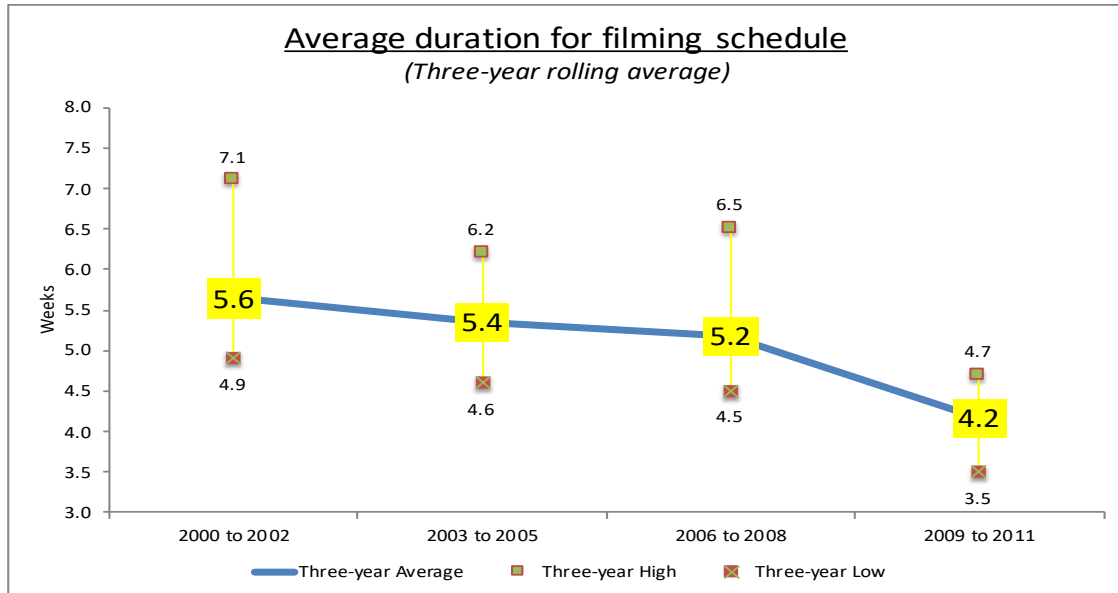


Figure 29 - Average filming schedule duration

Naturally, there were exceptions to these trends. For instance, *Idol of Evil* (2003) cost ~£9k and was shot using a digital Canon XL1, yet still took 14 weeks to be shot (IMDb 2013), while *Cloud Cuckoo Land* (2004) cost ~£1.5m and was shot on 35mm, but it took only three weeks to be shot. It is therefore evident that production costs and camera technology were not always indicators of the duration of manufacturing sub-process, and that other factors, such as the number of shooting locations and setups, could often be more reliable indicators. However, the data still suggest that there was a decrease of 25% in the average time needed for principal photography over the period, and that this was likely due to the increased

¹⁸⁴ Data on *Day of the Sirens* came from the Film File Europe (2009) and the data on *Bunny and the Bull* was from the EIFF (2012). It is not certain if these films or any of the films mentioned in this chapter required a full five-day week or were shot over the weekends, but the data indicates 'full week' periods (ibid.).

frequency of production of films like *Freestyle* and *Bunny and the Bull* that relied on an all-digital production process and that were made in less than 4.2 weeks (Figure 29).

This reduction in the duration of shooting schedules was accompanied by a reduction in the overall time needed for the entire script-to-screen process. In Chapter Four it was noted that digital technology gave low-budget producers the chance to improve the efficiency of their supply chains and, in so doing, gave them more decision alternatives to manage their projects better. This theory, however, could not be proven with a high degree of confidence since it is not as useful or easy to measure efficiency improvements for tasks in the planning and sourcing sub-processes, in terms of qualities like time and cost, as it is for tasks in the later sub-processes of the supply chain process.¹⁸⁵

This is why there is no single efficiency measurement that can be used to measure the entire supply chain for every movie. It is possible, however, to estimate the total length of time between the start of the manufacturing sub-process and the beginning of exhibition within the delivery sub-process. Although not a true indicator of the duration for the entire script-to-screen process, this quantity is precise enough to measure. Using that measure, the data show the average time required to make and deliver a low-budget film fell from 2.3 years in 2000 to 0.6 years in 2010 (Figure 30). This was a 74% reduction over ten years—a decrease that was far higher than the 25% reduction seen in the shooting schedules—and indicated that efficiencies must have been gained in the delivery sub-process at a much faster rate, proportionally, than those gained in the actual shooting of a movie.¹⁸⁶ Potential reasons for this disparity, such as the use of faster routes-to-market, will be explored later in this chapter.

¹⁸⁵ For example, it is conceivable a writer could take a week or years to write a screenplay or a producer a day or year to source a location.

¹⁸⁶ The average time taken for international distribution was 1.6 years.

Whatever the explanation, it is clear from the data that low-budget producers did indeed achieve significant process efficiencies, both in manufacturing and in delivery.

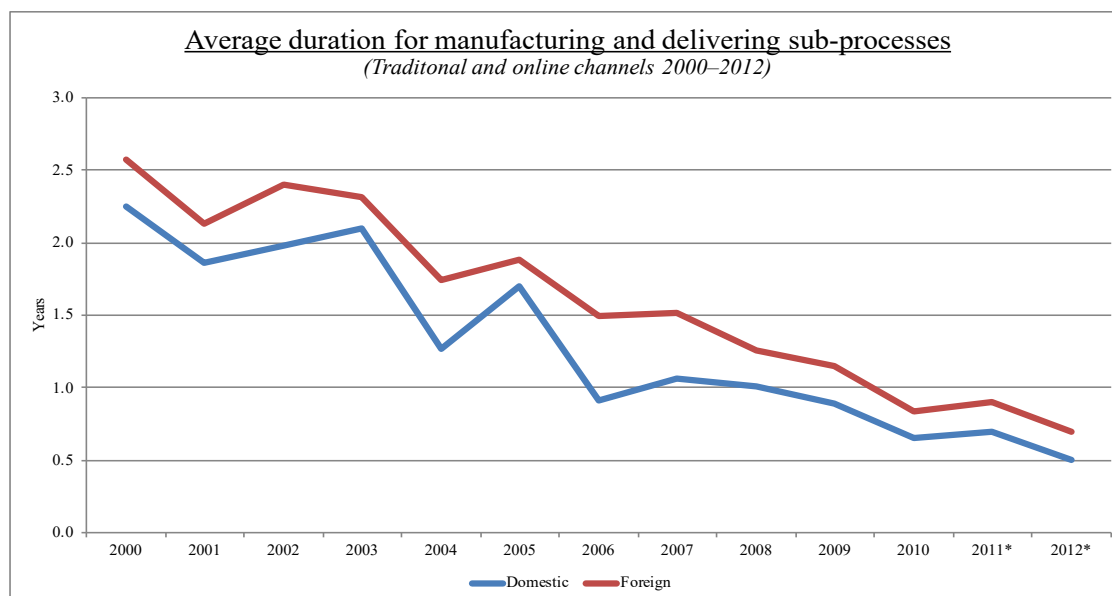


Figure 30 - Average manufacturing and delivering duration

6.2 Expenditure estimates

The reduction in the duration of the supply chain was also accompanied by a corresponding fall in production expenditure. This finding was already mentioned in Chapter Five, but can now be explained in more detail within the context of the manufacturing and delivering sub-processes. The first perspective of this trend can be seen in the plotting of the budgets for the low-budget productions surveyed in ascending order, and in the level to which the low-budget sector was skewed towards films made for less than $\leq\pounds 500k$, particularly those made for ultra-low budgets of $\leq\pounds 100k$ (Figure 31).¹⁸⁷ The ascending order of this data should not be confused with growth trend, but instead as an indicator of the number of films made for a certain budget. As was noted in Chapter Three, the sector has always been angled towards

¹⁸⁷ Of the 1,451 low-budget films, only 1,242 were identified as having a specific budget (Chapter Two).

very low-budget production, but as will be shown presently this trend accelerated during the digital revolution. In fact, analysis for this study shows that 68% of films were made for less than the sector's average of £446k, but only accounted for 11% of the total production cost of ~£554m (Figure 19).¹⁸⁸ The data presented here actually suggest that a shift to ultra-low-budget production was even more pronounced for movies made for ≤£50k since these made up 46% of the sector's production total, but only accounted for ~1% of its production expenditure (Figure 31). This corroborates the findings in Chapter Three since it indicates that the lower the budget the higher the number of films made at that lower budget level.

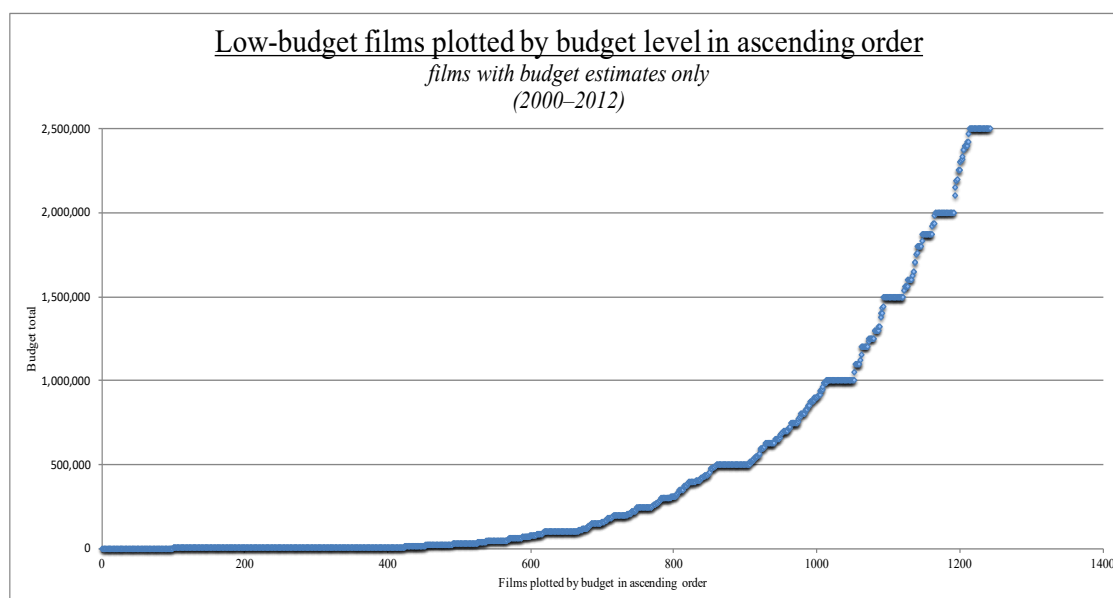


Figure 31 - Low-budget films plotted by budget level in ascending order

To assess whether or not manufacturing costs were falling, each movie surveyed in this study was plotted according to its budget in ascending order and the year it was made. As with the previous analysis (Figure 31), the results from this method also reinforced the findings of Chapter Three (Figure 18), but also indicated that most of this growth was in films made

¹⁸⁸ The mean of £446k is based on the 1,242 films that had a budget estimate from a verifiable source (Chapter Two).

for \leq £500k (Figure 32).¹⁸⁹ This trend is especially visible in 2004, 2006 and 2008, which were also years of heightened adoption rates of digital image-capture tools (Figure 20). However, perhaps more striking is the rate and consistency of the growth of films made at the lowest of budget levels, first noted in Chapter Three (Figures 18 and 19) but again demonstrated from this different perspective (Figure 32). This trend counters the macro-economic theory that mass output has to be accompanied by mass demand (Samuelson and Nordhaus 2010: 145) and suggests other film-industry peculiarities—such as an *ars gratia artis* motivation or the lowering of costs—created the pre-conditions for growth along with other factors like the rising number of private investors (Chapter One and Four).¹⁹⁰

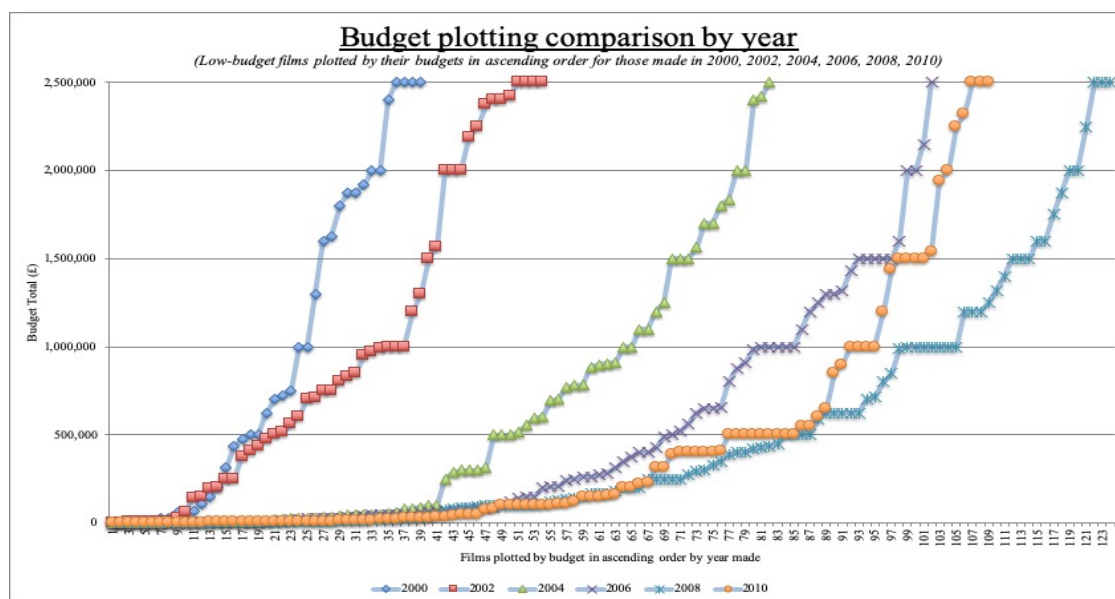


Figure 32 - Budget plotting comparison by year

With an increasing number of very low-budget films being made each year, and a decrease in production time, it is not surprising that the reported Average Production Cost (APC) for low-budget films fell by 82% over the period of the digital revolution, from a high of £927k

¹⁸⁹ The data for 2010 and 2012 have not been plotted since budget data for those years were only partially available.

¹⁹⁰ The only anomaly in this trend is in 2010, but this can be viewed as a statistical outlier since the data for this year were incomplete.

in 2000 to £168k in 2012 (Figure 33). This reduction in the yearly APC provides a different view from that of the mean of £446k since it also suggests that another economic logic did not apply in this case to low-budget filmmaking. This is because an 82% fall in the APC would normally signal a benefit from some level of economies of scale, but since most firms surveyed in this study only made one film that theory does not seem to be valid. It is also worth noting that the downswings in 2004 and 2005 also coincide with the years some of the major innovations discussed in Chapter Four entered the market—similarly to the coincidence between the increased use of digital tools and the heightened growth in certain years for films made for \leq £500k. For instance, it was in 2004 and 2005 that digital technology became the dominant format for the sector, and this was also just before Section 48 would be restricted in 2006—an event that did not seem to make an impact on total output but might have affected the amount spent on manufacturing (Figures 18 and 19).

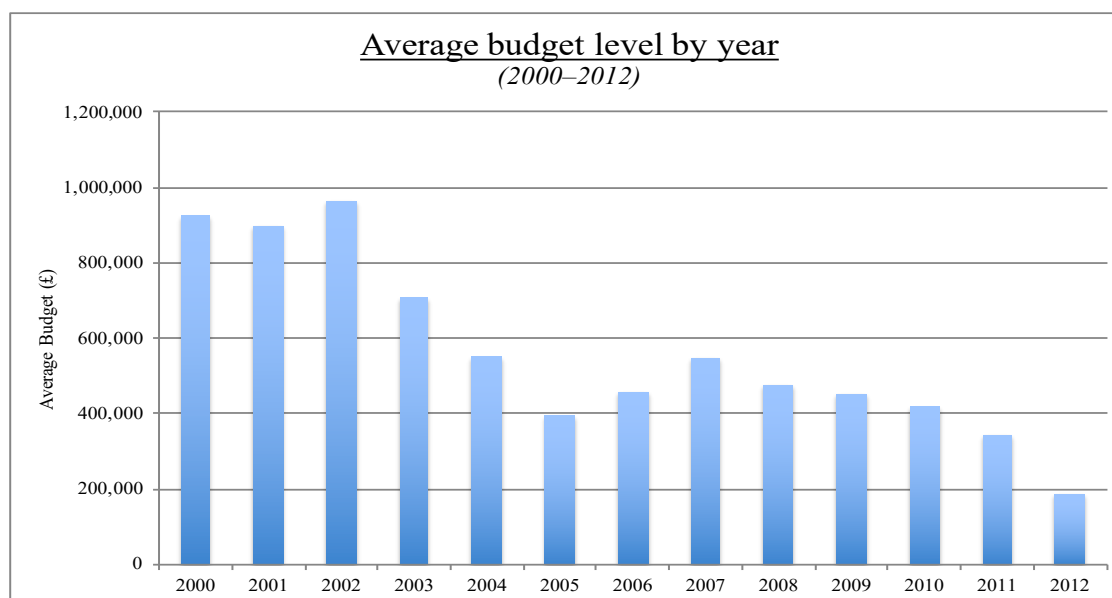


Figure 33 - Average production cost based on reported budget

Another perspective on these developments is provided by considering the affordability of production and how it might have influenced the decisions of new producers during this

period. This is because, for much of the early twenty-first century, there was a gradual rise in Personal Income Before Housing Costs (PIBHC).¹⁹¹ This potentially had some effect on attracting new investor-producers and the rise in private equity (Chapter Five); this is because the ratio of the APC of low-budget movies to the PIBHC fell during this period, from a high of 45:1 in 2000 to 18:1 in 2010 (Figure 34). Thus, not only did the APC fall but financing the entire low-budget supply chain became more affordable to more investors and thus it became possible for low-budget producers to finance the total cost of their supply chains personally. Although the data in this estimation are not entirely complete for the years after 2010, the data verified before 2010 are as accurate as any other gathered for this thesis. It is therefore possible to conclude that, aside from 2006 and 2007, the affordability ratio again started to rise at a more modest rate and eventually flattened out as the price of filmmaking tools reached a minimum.

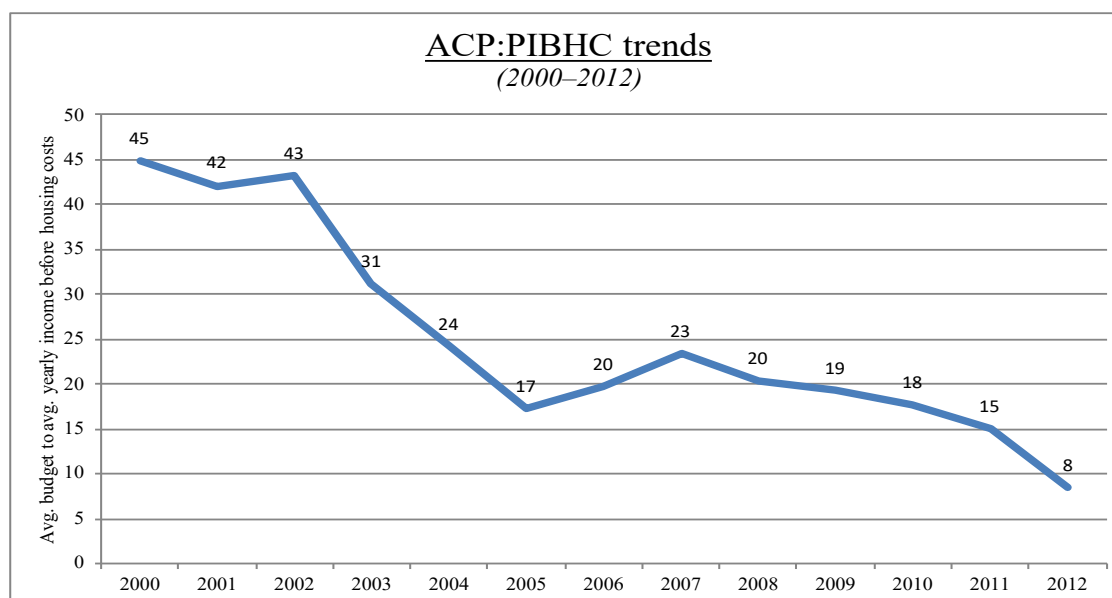


Figure 34 - APC:PIBHC trends

¹⁹¹ The PIBHC is one of a number of indexes used by the Office of National Statistics (ONS) and was chosen because data was available on their website at www.ons.gov.uk/incomeperformance.

The fall in the APC and the rise in the PIBHC index suggest a probable reduction of certain long-established barriers to entry to the film market that had tended to discourage the entry of new filmmakers. Throughout the history of the British movie industry one of the most problematic obstacles for would-be producers has been the need to finance a prohibitively high Minimum Production Cost (MPC) in order to make and release a commercial 35mm-quality feature-length film (Table 3). Unfortunately, there is no way to estimate a general MPC threshold for the sector since there is no one way to make a movie, but what is clear from the previous analysis is that the APC fell in parallel with a rise in the use of tools that could enable a more efficient supply chain (Chapters Four and Five). This would suggest that the average MPC also decreased as the average cost to make a film steadily decreased, complementing the findings in Chapter Four that indicate the digital revolution led to greater efficiencies in the manufacturing sub-process. As already mentioned in Chapter Four, major economic and logistical synergies are likely to have been gained by the removal of the costly time-consuming lab activities once needed in the ‘daily rushes’ process, while the advent of digital cameras offered 35mm-level quality and the capability to process images and sounds within a single workflow on a single computer in any location. Around the same time, the arrival of video-streaming websites allowed filmmakers to avoid the need to make costly post-production deliverables. As will be shown in the next section, new ways to circumvent distribution monopolies also became available (Wheeler 2009).¹⁹² Along with the mitigation of other long-standing barriers to entry, such as those related to a limited access to financing, training and critical skills, the mitigation of a prohibitive MPC level must have contributed to a surge of new producers entering the market, and thereby to a rise in production.

¹⁹² The use of digital direct-to-edit workflows that incorporated cameras such as the Red One™ camera, which in 2008 could capture both a 4K image and 4 channel 24-bit 48 kHz sound in a single device, is one such example.

One aspect of the films produced that does not seem to have been affected by the forces that brought about the growth in low-budget production was the runtime duration of the movies themselves. It would have been reasonable to hypothesise that as production costs per minute fell due to the effects of the digital revolution, the average runtime of low-budget films might begin to lengthen as production costs become less of an obstacle for producers. However, this does not appear to have happened. While the data indicate that runtimes did increase from an average of 90 minutes in 2010 to an average of 94 minutes in 2012, this increase was small, comparable to the typical amount of year-to-year fluctuation; since the beginning of the millennium, the annual runtime averages typically fluctuated between 89 and 92 minutes. This suggests a couple of things. Firstly, it suggests that digital technology and the reduction in APC had little impact on runtimes. Although costs fell, producers evidently did not increase the duration of their movies, even if many of them could have afforded to do so and Figgis' view that shooting ratios increased during the period (2007: 83). Thus, producers may have used the increased affordability to shoot more footage but followed this by being more selective about which footage to use in their final edits. Secondly, the lack of change in runtimes might also suggest that the traditional concepts of what have been thought of as the physical product elements of a movie seem to have remained the same—at least in the minds of those working in the low-budget sector (Vogel 2007: 92–98).

6.3 Delivering trends

Media economists have established statistical correlations between certain key production elements and the likelihood that a movie will obtain a successful exhibition: when independent producers use well-known directors and/or actors, base their film on a famous literary work, confine themselves to conventional genres, and/or secure a Hollywood studio as a partner, they improve the chances that their movie will secure a theatrical release (De

Vany 2004; Weinberg 2005; Wasko 2007). Intuitively, this could be because the use of such elements increases a film's audience appeal during promotion (Wasko 2007: 55). This view is supported by UKFC/BFI data, which indicate that the higher the cost of a movie with these elements, the more likely it is to be released (BFI 2013: 36). However, as noted in Chapter One and with the exception of genre, the sector seldom used these elements. Nevertheless, output still increased as theatre distribution as a percentage decreased, a correlational situation that supports, as will now be shown next, a growth-from-innovation hypothesis.

6.3.1 Formats: traditional to online channels

Over the course of the digital revolution, the percentage of low-budget films that achieved a 'traditional' domestic exhibition—meaning a theatrical release, terrestrial broadcast or DVD release—halved, from 60% in 2000 to 30% in 2012, and the percentage of movies that gained a foreign theatrical release fell from 35% to 15% over the same period (Figure 35). Much of this percentage decrease was due to a rise in output of films without traditional releases, with there only being a modest fall in the actual number of films being released via traditional domestic exhibition; in 2000, 36 films were released through traditional domestic channels and 21 films were launched on the foreign market, while in 2012, 30 movies appear to have secured a domestic release and 17 films were released in the foreign market. Overall, aside from some fluctuation in the rates for 2003 to 2004, there was thus a decline in traditional distribution in both percentage and numerical terms. This finding, however, should be interpreted with caution. Due to practical necessity, 'traditional release' should actually be interpreted as meaning 'traditional release prior to the data-gathering phase of this thesis'; movies produced earlier during the digital revolution, therefore had more time to secure a cinema release in time for inclusion in the data, than did movies produced towards the end.

Therefore, further research could potentially find higher percentages for the later years, and a more gradual decline in both domestic and foreign distribution than is shown in Figure 35.

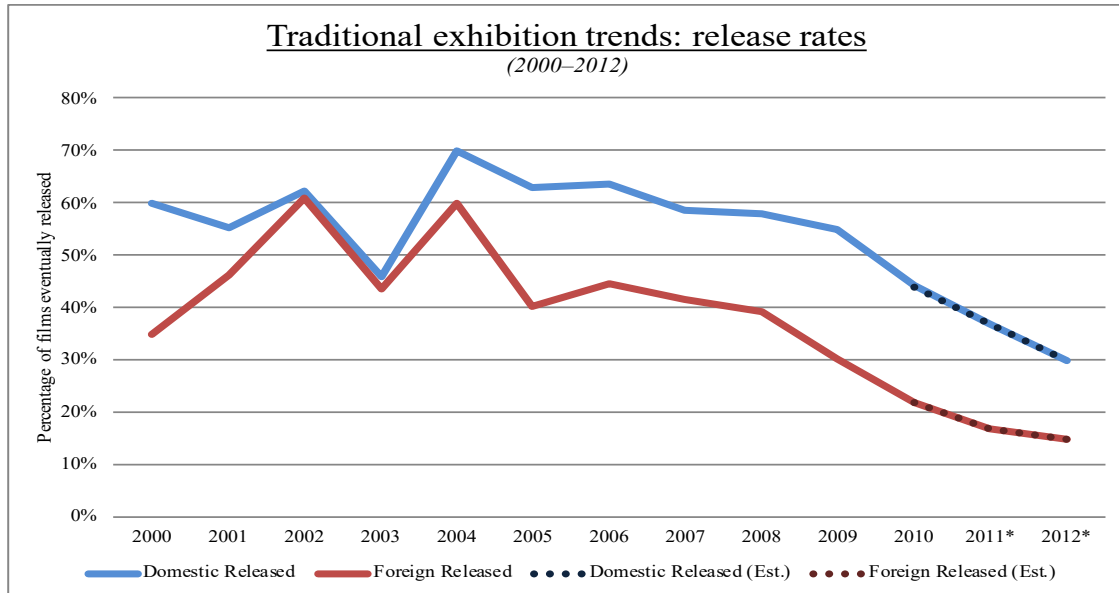


Figure 35 - Traditional exhibition trends: release rates

An interesting detail underlying these trends is that they reflect how format technology was evolving at the delivery stage, with a gradual decline in films that were able to achieve an exhibition through either a theatrical or DVD release as their primary distribution medium; from 2000 to 2012, the percentage of low-budget films that gained a domestic theatrical distribution as their first medium of exhibition fell from 20% to 7%, while the percentage that went directly to a domestic DVD release fell from 30% to 20% (Figure 36).¹⁹³ A similar trend was also evident in foreign-release movies, where the percentage of low-budget films that gained a foreign theatrical distribution dropped from 17% to 4% over the same period.

¹⁹³ The fall from 20% to 7% between 2000 and 2012 can also be represented by an 18% average for all the films theatrically released, but this average must be put into context since it may include films that were four-walled and/or publicised in cinemas. Hence, the estimate presented here is higher than the 3% to 5% estimate made by the UKFC/BFI at the time and their analysis of box office data supplied by Rentrak/Nielsen EDI (2007). The UKFC/BFI estimate should therefore be viewed as a more accurate measure of the commercial distribution rate for theatrical exhibition, whereas the estimate provided in this thesis is more useful for interpreting the theatrical trends. In regard to films that were eventually distributed via the DVD format, in percentage terms this decreased from 67% to 15% between 2000 and 2012 (822 productions). In terms of films that were eventually distributed via online legal: free downloads, this increased from 0% to 41% between 2000 and 2012 (111 productions).

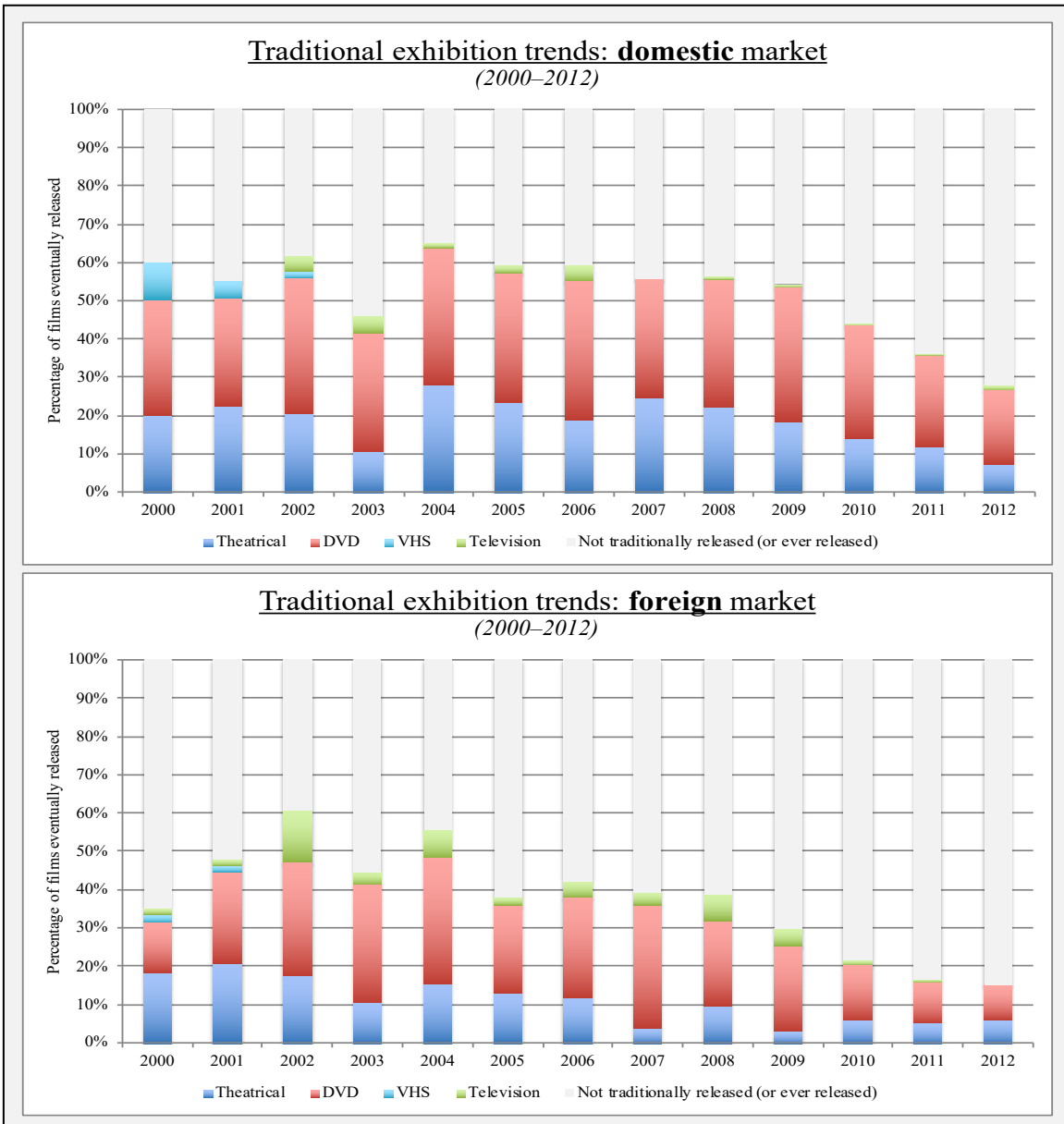


Figure 36 - Traditional format trends: domestic and foreign markets

When considering that the global film industry also underwent a percentage fall in theatrical and DVD releases during the same period, the fact that the number of UK low-budget movies achieving theatrical and DVD releases fell is not in itself unexpected (MPAA 2012).¹⁹⁴ What

¹⁹⁴ Evidence of a more competitive theatrical market is found in data published by the Film Distributors' Association data that indicates the annual number of films released in cinemas rose from 450 in 2004 to 577 in 2011, a 28% increase (FDA 2010: 9; FDA 2012: 14).

is more interesting is the almost total lack of terrestrial broadcasters in the distribution mix. It is unsurprising for this percentage to be low, given the lack of broadcaster investment noted in the last chapter and that various select committees had highlighted this issue as early as 1998 (Chapter One). However, the fact that few low-budget films were financed by PSBs after 2007 is notable from a McIntyre perspective given his view that links with PSBs was essential to any domestic strategy (1994: 105).¹⁹⁵ There could be several reasons for this. For example, the guild and union minimums that PSBs always had to pay may have risen to a point by the mid 2000s that exceeded the upper-budget limit to the scope of this study; furthermore, it is also possible that the PSBs restricted their efforts to a small number of films, and that these were not captured by the data used for this thesis.¹⁹⁶ Nevertheless, what it is still evident from these trends is that a gradual fall in cinema and DVD releases occurred over the course of the digital revolution, with little involvement by broadcasters.

The desire of producers to make movies for people to enjoy was not being fulfilled during the period in a traditional distribution sense, even though the nation was expanding its digital exhibition network (Chapter Four). Until the advent of VHS and DVD in the 1980s and 1990s, the prospects of a low-budget film being seen by anybody was low since other forms of exhibition, especially in theatres and broadcasting, remained largely inaccessible to those who wished to screen their work commercially. Given the likelihood that the usual result of a film's failure to be shown in a cinema is a financial loss, producers must have been under considerable financial pressure during this time. There is, however, more encouraging data that indicate that the low-budget sector was gaining more options to reach audiences.

¹⁹⁵ The film *Sparkle* was the only film to be made in 2007 with broadcaster investment (BBC) and that would gain a theatrical release.

¹⁹⁶ Additionally, in an interview in 2002, then FilmFour Head Paul Webster indicated a strategic direction away from financing the entire cost of a low-budget film to one of investing in more expensive medium-budget co-productions (Hill 2002). As discussed in Chapter Two, *The British Film Industry: Sixth Report of the Session 2002–03* report, confirmed an annual £10m fund for both BBC and FilmFour, while ITV was 'explicitly not willing and does not invest in British film production' (CMSC 2003: 43).

These more encouraging data comes in the form of two other supply-chain trends: the earlier noted fall in the average time spent for the manufacturing and delivery stages, and a rise in the rate of online exhibition. These two trends are interconnected, but it makes sense to reconsider first the 74% fall that took place in the average time needed for manufacturing and delivery (Figure 30). This figure has already been presented as evidence that the duration of the supply chain had shortened between 2000 and 2012. This gave plausibility to the view that workflow efficiencies had been gained, but that a greater proportional efficiency gain occurred at the delivery stage than at a manufacturing stage. In particular, the 74% reduction for the average time used for both stages was greater than the 25% fall that took place at the manufacturing stage only. Both of these trends support the view that the rise in output was brought about by technological innovation (Figures 29 and 30), but they also suggest that producers were increasingly deciding to use new, faster, efficient and more direct producer-controlled routes-to-market; particularly online exhibition.

The opportunity online exhibition offered was good news for producers faced with more a competitive traditional distribution market and this situation seems to have been exploited. When considering all the low-budget films made throughout the period, it can be seen that the percentage of productions that gained some level of online exhibition rose considerably (Figure 37). In 2000, 23% of movies gained an ‘online legal’ release of some kind; with the exception of 2001 and 2003, when it dipped <20%, this percentage rose progressively and is likely to have exceeded 40% by the end of 2012*—despite the rise in production.¹⁹⁷ As

¹⁹⁷ This finding should be considered within the limitations of the methodology used. The first limitation is that all the data would be based on the year of production. For example, a film that was made in 2000 and distributed in 2006 would have been counted as distributed in 2000 as that was the year in which it was made. The second limitation is that these statistics are not cumulative since a movie could be counted numerous times. For example, a 2002 film could have obtained a 2004 theatrical release, then a 2006 DVD release, then appear as an online illegal download in 2006, then as an online legal: fee download in 2007 and as an online legal: free download in 2008. This film would be counted five times in the year 2000 statistics. This limitation, however, was mitigated because the average delay estimates give some indication of the lag from the end of manufacturing to the start of delivery using the first exhibition method used. An ‘online legal’ film (fee or free) is a film that is exhibited via an online platform that has secured the IPR option to do so.

traditional exhibition fell, therefore, online distribution rose. However, even though the 40% online legal distribution rate in 2012 was higher than the 30% traditional distribution rate, it should also be remembered that in this year 46% of all low-budget films did not obtain any type of exhibition and this is likely why online distribution increasingly became the preferred option for the sector.¹⁹⁸

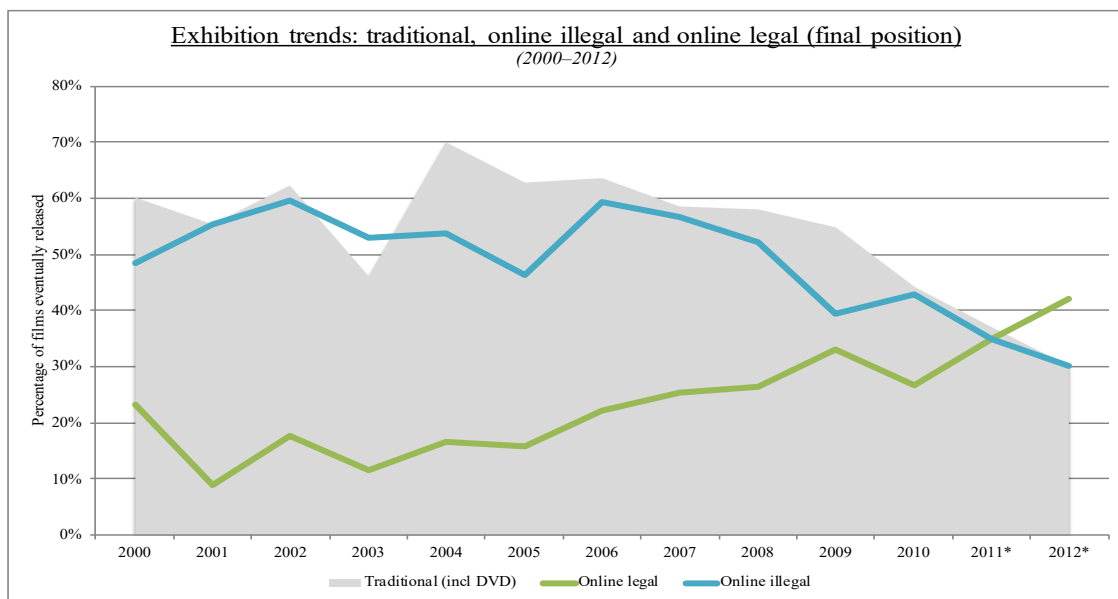


Figure 37 - Format trends: traditional, online illegal and online legal

The rise in online legal distribution is also interesting because it contrasts with the percentage change that occurred in ‘online illegal’ films available to be download (Figure 37).¹⁹⁹ This is because when online illegal versions of films are viewed as a percentage of total sector output it appears that the online illegal percentage of films was decreasing while the online legal percentage of the same films was rising. However, it is useful to note this observation in terms of absolute numbers, so that a complete understanding can be gained. Although the

¹⁹⁸ The one exception to this was represented by films that were screened only at festivals.

¹⁹⁹ An ‘online illegal’ film is one that has been made freely available on an online peer-to-peer file sharing platform (Limewire, BitTorrent) without the consent of the IPR holder.

percentage of low-budget films available illegally online did decrease from 48% in 2000 to 30% in 2012, in absolute terms this change actually corresponded to a rise of 17 films, from 29 in 2000 to 46 in 2012, though this issue did not seem to gain much attention from law-enforcement agencies.²⁰⁰ Nevertheless, the percentage of online illegal movies did fall, and one of the most probable reasons for this trend was a rise in the number of films that were distributed online legally: from 23% in 2000 to 42% in 2012 in percentage terms, and from 14 films in 2000 to 84 films in 2012 in absolute terms. These statistics confirm that, for the first time, a supply-chain workflow based entirely on digital technology, even up to the point of exhibition, had been largely achieved (Figure 37). The reasons for a possible connection between a fall in online illegal films and a rise in online legal films will be explored in the next section, but evidence here suggests the degree to which traditional distribution was being eclipsed by a new way of exhibiting films, and that the absolute number of online illegal films was not growing nearly as fast as the overall growth in sector production.

6.3.2 Channels: sales agents, distributors, exhibitors and self-distribution

The distribution trends for traditional and online formats can also be compared with data that highlight the route-to-market decisions made by producers, such as those decisions relating to the use of sales agents, distributors and ‘self-distribution’ methods.²⁰¹ In this case, the yearly percentages of films eventually released indicates that the use of sales agents and distributors generally declined, as did the use of traditional forms of distribution, while self-distribution increased markedly: from 2000 to 2012 the use of agents fell from 75% to 24%, the use of distributors fell from 73% to 31% and the use of self-distribution rose from 0% to 53% (Figure 38).²⁰² In absolute terms, the number of films for which agents were used rose

²⁰⁰ Throughout the entire research phase of this study, not one example was found of law enforcement involvement in dealing with piracy.

²⁰¹ ‘Self-distribution’ refers to the case where no established agent or distributor is involved in the supply chain process. Usually all distribution sub-process tasks are undertaken by the producer or production company and no ownership transfer of IPRs takes place.

²⁰² A total of 237 self-distributed films were identified in the census conducted for this thesis.

from 45 in 2000 to 66 in 2012, and the number of films for which distributors were used rose from 44 in 2000 to 89 in 2012. This suggests that agents and distributors still grew the size of their portfolios, but at a rate much lower than the rise in output, such that much of the increased film output would not be optioned. This fact also helps to contextualise the 46% of films that did not obtain a commercial distribution and explains why producers increasingly decided to use the new online content providers described in Chapter Four and self-distribute their films via online legal channels at rates that seemed almost unabated.

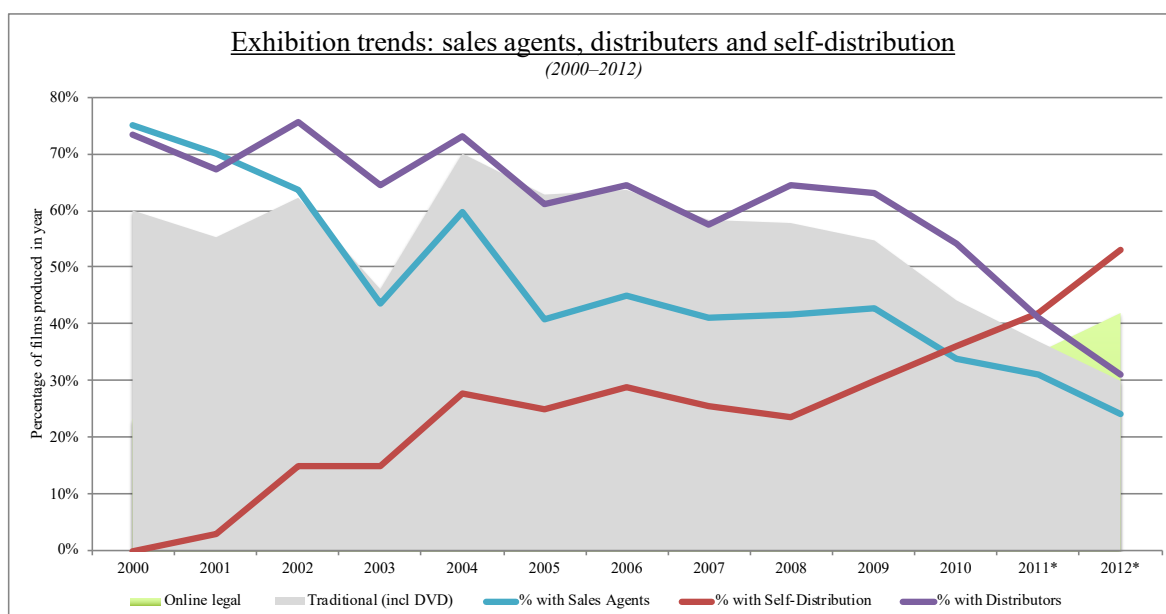


Figure 38 - Exhibition trends: sales agents, distributors and self-distribution

This transformation may have had an effect on the relationship producers had with sales agents and distributors and so it is useful to profile the status at the time of these delivery sub-process participants. In fact, there were only 50 to 75 active sale agent firms at any one point in time during the digital revolution and only 17 of those companies had both sales and distribution capabilities. These firms typically employed fewer than five people, had fewer than five titles under option, seldom represented medium or high-budget films or foreign-

made films and often folded within six years.²⁰³ There were, of course, exceptions to this situation. For example, one firm that specialised in sales and distribution was HanWay Films, which represented six of the films surveyed in this study, including Sarin's *Dreaming Lhasa* (2005) and Huda's 2006 cult-hit *Kidulthood* (HanWay Films 2014). Based in London and with options to dozens of foreign and domestic titles, this firm appeared to have a consistent level of financing, stable management, a broad film catalogue, a diversified set of operations, and links, both formal and informal, to broadcasters (ibid.). There were other firms as well, like The Works, Icon Entertainment, Pathe Pictures, Park Entertainment and FilmFour, with similar characteristics and which sold and/or distributed at least five low-budget films each, thus suggesting that agents with a niche market focus could be economically successful with low-budget productions.

Such organisations were exceptions, however, and their capacity to acquire new products was limited. This point is illustrated by the fact that, out of the 623 movies for which some form of representation was obtained, only 196 secured the services of a top-twenty agent or distributor; and, among the other 427 films, 277 were optioned to firms which had the rights to only one other title (Table 16). While it is possible that some of these firms might have had additional films in their product catalogues, not included in this study due to having higher budgets or to being foreign films, the data gathered for this study still suggest that most of these firms had small film portfolios and no apparent contractual links with PSBs.²⁰⁴ This situation likely inhibited the growing number of low-budget producers in gaining a traditional release and helps to illustrate the degree to which the sector was not able to improve its theatrical distribution rate in line with a rise in production.

²⁰³ The agent listings included in *The Knowledge* for 2000, 2002, 2004, 2006, 2008, 2010 and 2012 were the source for these statistics.

²⁰⁴ Based on a survey of the respective companies' websites.

SALE AGENT RANKING PROFILE		
<i>(Top twenty agents by numbers of films represented)</i>		
Rank	Top twenty sales agents / distributors	Films represented
1	The Works	22
2	Moviehouse Entertainment Ltd.	17
3	AV Pictures Ltd.	14
4	High Point Films and Media Group	13
5	FilmFour	12
6	Content Film International	11
7	Pathe Pictures International	11
8	Protagonist Pictures	11
9	Stealth Media Group	10
10	Icon Entertainment	8
11	Centre Films Media Sales Ltd	7
12	Left Film Sales Ltd.	7
13	Seven & Seven Producers' Sales	7
14	Carnaby International	6
15	HanWay Films	6
16	Park Entertainment Ltd.	6
17	Portman Film and Television Ltd.	6
18	Vine International Pictures	6
19	Celluloid Dreams	5
20	Shoreline Entertainment Inc.	5

Table 16 - Sale agent ranking profile

Although the limited capacity of these delivery companies is an important factor in terms of the sector's low rate in traditional distribution, it cannot be considered the only factor. This is because every independent production, regardless of budget, faced major challenges when entering a saturated UK market. As noted in Chapter One, one reason for this is because the studios controlled the traditional exhibition network with the appeal of their blockbuster films, their capacity to spend vast amounts of money on marketing and their ability to block-book an entire season. This, along with a surge in output and the continuance of the barriers to entry from the analogue era, makes it unsurprising that low-budget film producers began bypassing domestic sales agents and distributors by self-distributing their own productions.

At the start of the digital revolution, the data indicates that much of this self-distribution took the form of DVD distribution; however, towards the end of the period the number of 'online

legal: fee’ and ‘online legal: free’ movies began to rise steadily (Figure 39).²⁰⁵ The rise in online legal: free films is particularly of note since it offers an explanation for why the absolute number of online illegal films was not rising as fast as the rate of film production (Figure 37). This is because the annual output of online legal: free films grew both in percentage and absolute terms, rising from 0% in 2000 to 20%, or 34 films, in 2010.

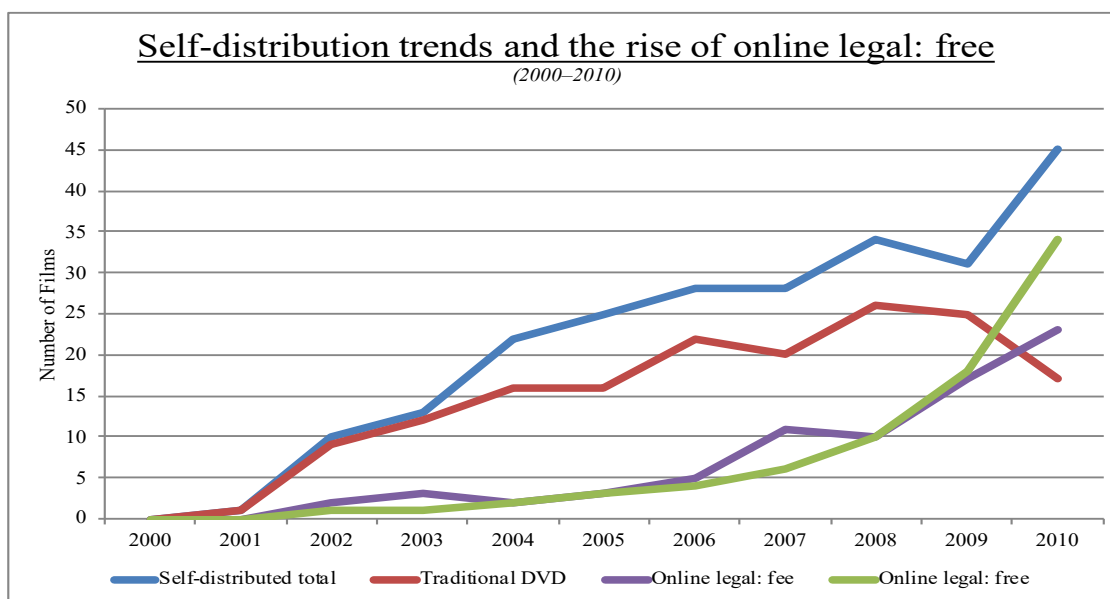


Figure 39 - Self-distribution trends and the rise of online legal: free

While the online legal: free format might have had negative economic consequences for the low-budget sector—for instance, by limiting the number of opportunities to monetise value from IPRs, except potentially through advertising revenue—it indicates the continuance of the traditional distribution challenges that have long existed and the extreme extent to which producers went to overcome the limited capacity of domestic agents and distributors in order to secure an exhibition, irrespective of economic consequences.

²⁰⁵ An ‘online legal: fee’ film is one that is exhibited via an online platform that has secured the IPR option with the aim to charge customers (Distrify, iTunes). An ‘online legal: free’ film is one that is exhibited via an online platform that has secured the IPR option but does not charge customers (YouTube, Vimeo).

One extreme example of self-distribution by a low-budget film production company, at least from an online legal: fee perspective, can be seen in the IMDb history record of Palm Tree Entertainment. Based at Pinewood Studios, this firm produced 19 films from 2000 to 2012 at budgets estimated to be <£25k.²⁰⁶ With the exception of *Deep Lies* (2006) and *Photoshoot* (2009), the director for all of these movies was Robbie Moffat, whose prodigious efforts resulted in Palm Tree Entertainment becoming the most prolific self-distributor in the low-budget sector.²⁰⁷ Although the firm's distribution efforts during the digital revolution were largely focused on streaming and on sales of DVDs using its own online catalogue, most of its films could also be obtained from sites including Euroflix (VOD), eBay (DVD), Amazon (VOD) and the UK online exhibitor/retailer Distrify (VOD).²⁰⁸ Retailers and exhibitors such as these are indicative of the web-based firms used by most of the producers represented in the self-distribution trends on DVD and online legal: fee films included in Figure 39. Yet, the observation that none of these films obtained a commercial theatrical release underscores another trend finding from the data gathered. None of the self-distributed films identified in this study ever achieved a theatrical release or a terrestrial broadcast in a way that appeared to be commercially viable to the original IPR owners. This leaves open the question of why the producers of these films decided to self-distribute in ways that would unlikely result in their work ever being screened in cinemas—the original medium of movie entertainment.

Two obvious potential reasons for this relate to the earlier discussed barriers to entry; firstly, a lack of power relationships (Wasko 2007: 4); secondly, the possibility that the producers of these films might have been more preoccupied with *ars gratia artis* motives than with profit motives (Chapter One). From such a viewpoint, it could be argued that these producers

²⁰⁶ Primarily based on IMDb record at www.imdb.com/name/nm0595586/.

²⁰⁷ This is based on the number of titles the company distributed relative to the other production firms in the sector that self-distributed.

²⁰⁸ The term 'VOD' means Video on Demand.

might have started the supply chain process more concerned with production rather than with distribution. This possibility is undoubtedly likely in ‘build-to-sell’ cases, but is less likely at the sector level. It can alternatively be argued that most producers may have recognised their fiduciary responsibilities to investors, but nevertheless been unable to engage effectively with distributors due to issues such as poor linkages and inadequate business training. These and other possible barriers will be explored again in the last chapter, but it is worth mentioning here that such factors all interact with the decisions made by the producer. The importance of the low-budget producer in this case cannot be stressed enough, since it is often through that individual’s salesmanship and perseverance alone that a cinema exhibition deal is obtained (Chapter Two). It therefore can be concluded that it is essential that the low-budget producer should have the level of skills and education necessary to identify potential acquisition executives and to engage with them in a manner that leads to the producer having a thorough understanding of the market. This means that for a low-budget film to have any chance of being seen by a paying audience, it requires not only artistic merit, but also a producer who can overcome the formidable barriers to entry that are inherent in the delivering sub-process (Chapter One).

Finally, a third potential explanation for the rise in self-distributed low-budget films must be acknowledged: the possibility that a number of them are simply not commercial enough to compete for mainstream or niche audiences. To be blunt, these films may simply have been low-quality. This is an unsettling prospect for the low-budget producers who created these films, but nevertheless, this is a serious possibility for why many producers had to take on the added responsibility of exhibition. While this study does not attempt to assess the quality of low-budget films, it does attempt to assess the low-budget sector’s contribution and, as will be apparent in the next two chapters, improving quality is an obvious means to improve

contribution. Therefore, in noting the high probability that many films were of low-quality, it is also reasonable to conclude that many low-budget producers were often using online legal: free platforms not because they wanted to, but because they had no other choice.

6.4 Conclusions

This chapter has provided further evidence that the low-budget supply chain underwent significant changes during the digital revolution and that an increase in production was likely caused by the sector's adoption of new technology. It has done so first by identifying trends that occurred in the manufacturing and delivering sub-processes. This evidence was seven observations pinpointing: a fall in the average duration of the supply chain process; a fall in the Average Production Cost (and likely a fall in the Minimum Production Cost and a general rise in the ability to self-finance); a percentage fall in the use of traditional exhibition; a rise in percentage and absolute terms in the use of online distribution platforms (legal: fee and legal: free); a reduction in percentage and absolute number of online illegal films; a lessening in the use of agents and distributors; and a rise in percentage and absolute terms in self-distribution. Therefore, the trends described in these findings and the correlational evidence that they provide require examination, not only because they indicate that the supply chain had become more efficient, but also because they showed the extent to which the manufacturing and delivering sub-processes had become more open to new entrants. This especially involved reductions in the perennial barriers to entry that McIntyre and Ilott once described as inhibitors to a more sustainable industry, including those related to a high MPC, poor links with PSBs and limited access to private capital, factors that were evidently no longer inhibiting production to the level to they had been before the digital revolution.

The lowering of these barriers to entry was first noted in a 74% reduction in the average time taken for the manufacturing and delivering sub-processes together, and in an 82% decrease in the APC. In absolute terms, the average duration of the low-budget supply chain process was reduced from 2.3 years in 2000 to 0.6 years in 2012, and the average reported cost of making a low-budget film fell from £927k in 2000 to £168k in 2012. Given that economies-of-scale forces could not have been a factor in these trends since most production firms only made one film, this suggests that the supply chain process became more efficient and less costly to complete at all production levels. As Chapter Four indicates, the most likely causes for this transformation were the improved image/sound quality capabilities and lower cost resulting from an increasingly all-digital supply chain process that could be accomplished in almost any location and at any budget level. The APC not only decreased, and likely the MPC as well, but personal incomes also rose over the period; evidence relating to this was provided by a fall in the APC:PIBHC ratio, from 45:1 in 2000 to 18:1 in 2010. This development signalled a greater ability to finance a movie independently without requiring the typical forms of investment that were seldom accessible to first-time producers, and likely made financing an entire project more feasible for small investors (Chapter Five).

It can also be argued from a growth-from-innovation perspective that the disruptive changes that resulted in a 74%, or 1.7 year, decrease in the average duration of the manufacturing and delivering sub-processes was mainly due to a reduction in the time needed to distribute a movie to audiences. This was evident in five sector-average figures, indicating, over the 2000–2012 period: a fall in traditional distribution, from 60% to 30% of all productions; a rise in online distribution (both legal: fee and legal: free), from 23% to 40% of all movies; a decrease in the number of films available for illegal download, from 48% to 30% of all productions; a decrease in agent and distributor use, from 73% to 24% of all films; and a rise

in self-distribution, from 0% to 53% of all movies. Therefore, as output was quadrupling, producers were increasingly moving away from using traditional forms of distribution and established channels based on agents and distributors, and instead adopting web-based forms of delivery and self-distributing their own productions as a percentage of annual production. This change occurred in spite of the fact that the actual number of traditionally exhibited films fell by only six, and the number of features represented by agents and distributors rose, suggesting that the traditional distribution market remained relatively flat throughout the period. This, however, posed an altogether new dilemma for the low-budget sector.

With a growing output of feature-length films, this situation led to an increasingly saturated market that left the overwhelming majority of new low-budget producers with two options: either to self-distribute online or to abandon any form of commercial exhibition altogether. While it is probable that more expensive low-budget productions, supported by a studio or PSB, or linked to well-known talent, were still able to gain traditional exhibitions, the rising number of producers who made movies for \leq £500k and had none of these advantages faced a much more daunting task if they attempted to gain a commercial release. However, a lack of alternatives was not the only reason why online distribution showed a marked rise in usage over the course of the digital revolution. As was already detailed in Chapter Four, the digital revolution brought with it many platforms for producers to ‘cut out the middleman’. These platforms made it easy to provide and upload content; thus, there was no longer a need to create a long list of highly expensive 35mm deliverables, to incur costly and time-consuming lab fees or to conduct a protracted sales process to entice agents. These and other such rewards of digital technology not only saved low-budget producers considerable time and expense but gave them greater control of the supply chain, as repeatedly asserted by the practitioner authors (Chapter One). Producers gained confidence in the fact that they were

in more control and could decide when and how to release their films. The longstanding barrier-to-entry to distribution markets was, theoretically, removed and, as a result, likely encouraged even greater numbers of new producers and levels of private equity investment.

Finally, another interesting trend revealed in this chapter is the increase in online legal: free downloads and how they were projected to surpass online legal: fee movies. This is because the increased use of this form of exhibition likely affected the commercial relationships that producers had with distributors and, most crucially, with their audiences. While it offered the potential to reach a worldwide audience, albeit on the small screen, and was an alternative for producers who had been shunned by more established agents and distributors, the risks in taking this approach were high. The format offered few apparent opportunities to generate revenue and had the potential to undermine historically lucrative ways to generate an income from cinema, television and DVD sales.²⁰⁹ Producers were likely aware of these risks given the financial consequences that could befall their firms if they failed to secure an investment return on their IPRs. In fact, no evidence was found that indicated producers of these films preferred no-fee formats since there are pragmatic reasons why they would have tried to use fee sites before resorting to free sites. Nevertheless, despite these risks, a rising number of movies was being legally streamed on the web by non-paying audiences to the point that by 2012 90% of all low-budget films were gaining some level of distribution—a situation likely caused by a sizeable group of filmmakers who might have created their films for *ars gratia artis* reasons or had no other choice. As to whether these and all other low-budget movies manufactured during this period made an economic or cultural contribution to the British motion-picture industry is a line of enquiry that will now be investigated.

²⁰⁹ The NPA (2010) and Shooting People (2008) discussion boards often discussed the financial potential legal: free downloads might offer producers in terms of advertising revenue, but no example case studies were found that proved this type of income was achieved.

7. THE SUPPLY CHAIN: EVALUATING CONTRIBUTIONS

Over the last three chapters this thesis has presented a wide-ranging collection of economic observations suggesting that the use of digital technology in the supply chain set in motion the necessary preconditions for an unprecedented rise in the production of low-budget films. Most of this evidence took the form of identifying and quantifying trends in time series data; this yielded insight by identifying measurable changes reflecting the ways in which producers chose to make and exhibit their films. The changes the supply chain experienced as it moved from analogue to digital technology have therefore been measured, but these changes also merit evaluation from the view of the sector's contribution to the wider British film industry. As stated earlier, one of the aims of this thesis is to gain a better understanding of the contribution of the low-budget sector and to use that assessment to advance the long-running discourse on how to achieve wider sustainability of the British film industry. Given the unique artistic and market-oriented product traits of movies, this aim can be achieved by defining its contribution in terms that are both economic and cultural. As such, this chapter will consider the aggregate of the cost estimates presented in Chapter Five and new revenue estimates to derive an economic profile of the sector. This profile will then be augmented with a list of the cultural achievements in terms of festival participation, audience responses and greater diversity in stories and talent.

7.1 Economic contributions

In Chapter Two it was explained that the estimate of total economic contribution made in this study is based on a customised Measurable Economic Activity (MEA) approach. This approach was derived from the relevant types of data used by the UKFC/BFI in their Gross Value Added (GVA) estimations and that were also available in the secondary sources identified during the research design stage (Table 8). As already noted, the MEA total

presented herein is based on the total of all the manufacturing expenditure, based on the budget total for each low-budget film, and on box office revenue for all the productions surveyed in this thesis. Since these were the only two types of data used, the MEA is only intended as a relative measurement of the economic activity of the low-budget sector, and a means to compare the sector's economic size to the entire British movie industry using an equivalent industry estimate. While it would have been ideal to estimate a GVA total for the sector so that direct comparisons with the published UKFC/BFI GVA estimates could have been more easily made, the lack of verifiable data in this case did not make this (preferred) approach logistically possible. Hence, the MEA estimate used herein should only be viewed as an indicator of the level of economic activity for the sector during the digital revolution and the relative size of that activity compared to a similarly calculated number for the overall British movie industry, and not be confused with other economic indicators such as turnover, profit or net economic contribution to the domestic economy.

Based on this customised MEA approach, the economic contribution of the low-budget film sector during the digital revolution was ~£613m, which was comprised of ~£554m for production costs and ~£59m for domestic box office revenue. As was also noted in Chapter Two, this estimate does not include GVA elements such as marketing costs and online exhibition revenue, since this data was not available at a sector level. If such data were available, the estimated ~£613m total would have been higher; however, the inclusion of such data was not necessary for the purposes of the MEA used in this thesis, since it was still possible to isolate like-for-like industry totals in the *Statistical Yearbooks* published by the UKFC/BFI. When considered using these like-for-like industry estimates, the sector's economic contribution of ~£613m equalled ~2.3% of the entire UK movie industry's £26.2b MEA economic activity, which can also be expressed as a ~3.6% share of the £15.3b national

manufacturing expenditure and a ~0.5% share of the £10.8b in national box office revenue receipts that occurred during the digital revolution.

This relatively modest economic contribution to the national film industry is consistent with the evidence presented on Hollywood hegemony of the domestic market and with the traditional delivery trends noted in Chapter Six, and therefore is not unexpected. What is noteworthy about this MEA total estimate is that it represents a level of economic activity that was achieved without a high level of public-sector investment (Chapter Five), and that it can be interpreted more favourably when analysed in comparison with all the other independent British-made films produced during the digital revolution—including those made with higher budgets. To present these perspectives, and at the same time provide a more detailed understanding of the sector's ~£613m economic contribution to the domestic movie industry as defined by the MEA approach herein, it is necessary to reconsider the ~£554m estimate for manufacturing costs presented in Chapter Five, and to provide further details and comparisons on the ~£59m box-office revenue estimate.

7.1.1 Supply chain expenditure contribution (cost estimate revisited)

As pointed out in Chapter Six, the estimated economic contribution of ~£554m is based on the total cost of the 1,451 low-budget films made during the digital revolution, estimated from the reported budgets. This approximation, however, was based on data sources that sometimes were incomplete or could not be fully verified. If more precise data were available, the total might be found to be either understated or overstated, and so the estimate should be viewed as an approximate number rather than a precise total (Chapter Two). For instance, the ~£554m estimate's calculation included 216 movies with a zero-cost estimate, because no verifiable cost estimate could be found. These films were nevertheless included

in the 1,451 films identified during the data collection phase because they exhibited other non-cost attributes indicating that they met the low-budget criteria defined in Chapter One. Together with the need to maintain consistency between data sets, this is why these 216 films were included in both the total production estimate of 1,552 films (Chapters Two and Three) and in the cost estimate of ~£554m. From one viewpoint this means that ~£554m is likely to be an underestimate, as it does not include the costs of 216 films; on the other hand, however, the total also may be overstated, since it is based on published budget statements, and, as was argued in Chapter Two, producers have incentives to exaggerate their budget pronouncements in order to foster the PR perception of a more valuable production (Simens 2003: 123). The level of such bolstering is, however, impossible to estimate with any level of certainty and therefore the ~£554m estimate should be used as a rough indicator of the sector's economic size in relation to the UK film industry.

When the cumulative total of ~£554m is compared to the ~£15.3b generated by the UK film industry over the same period, it would appear that the low-budget film sector accounted for ~3.6% of the domestic industry's total manufacturing expenditure during the period.²¹⁰ In fact, when considering that the ~£15.3b industry total includes 'film and video' production, the ~3.6% share for the low-budget sector could also be viewed as understated since such revenue categories are not included in the ~£554m estimate (BFI 2014: 224). Nevertheless, despite the limitations of the secondary sources used and the difficulty of making precise comparisons with UKFC/BFI estimates that were calculated with different source data and likely have more financial variables included, the ~3.6% share estimate still offers a relative positioning of economic benefit from which an evaluative judgement can be made. For

²¹⁰ The estimate of £15,345m was based on the cumulative of 'UK spend of feature films produced' for movies listed between 2000 and 2012 in the *Statistical Yearbook* (BFI 2014: 180).

instance, when the relative position of the low-budget sector in relation to all independent UK-made films is considered, the low-budget sector's share of manufacturing expenditure was ~22% instead of the ~3.6% achieved at the national level. The ~22% estimate is perhaps a more indicative measure of economic contribution for the sector since it is based on the ~£554m manufacturing expenditure total and a ~£2.6b UK expenditure total for all 'domestic (indigenous)' films as defined and published by the UKFC/BFI in their *Statistical Yearbooks* for the years 2000 to 2012 (BFI 2013: 184).²¹¹ This view therefore indicates that the low-budget sector, based on a large number of films made for ≤£500k that were funded by private equity with almost no direct investment from the public sector (Figure 31), accounted for roughly a quarter of all independent domestic production expenditure during the digital revolution. Hence, although on a national industry level the sector's share of the manufacturing economy was modest, it was arguably still significant when considering it was at this time a major contributor to the independent domestic filmmaking economy.

7.1.2 Box office revenue contribution

The revenue generated from traditional distribution formats, particularly productions that started their exhibition cycle with a cinema release, commercial DVD deal and/or terrestrial broadcast, has already been contextualised in Chapter Six by the observation that the percentage of films gaining a traditional release halved between 2000 and 2012 (Figure 37). While some of this percentage decrease can be attributed to a rise in output while the number of films that obtained a theatre release remained relatively fixed, this reduction should also be considered in the context of other delivery-stage trends. These include: a rise in online legal: fee and online legal: free exhibition, a persistent lack of PSB financing and a move to

²¹¹ The UKFC/BFI defined a 'domestic (indigenous) UK film' as a 'feature made by a UK production company that is produced wholly or partly in the UK' (2013: 184). The ~22% estimate, therefore, does not include manufacturing costs from productions defined by the UKFC/BFI as 'inward features (single country)' or 'co-productions (excl. inward feature) UK spend only' (ibid.).

self-distribution (Figures 37 and 39). Notably, in spite of a move away from traditional exhibition formats, the secondary data on which these trends are based indicates that 18% of low-budget films gained a UK cinema release and 9% secured a foreign cinema release—percentages that were based on relatively constant absolute numbers throughout the period.

These percentages not only indicate the level of theatrical distribution that the sector achieved, but also confirm that a modest economic contribution was made to the British motion-picture industry. This contribution took the form of ~£59m in domestic box office revenue and ~£54m in foreign box office revenue.²¹² As noted earlier in this chapter, on initial examination the ~£59m in domestic box office receipts does not appear to be of much significance, since it comprises only ~0.5% of the £10.8b box office revenue generated by the entire British film industry.²¹³ To put the ~0.5% into a bit more perspective, it is roughly the same level achieved in the UK by all foreign films excluding those from Europe and India (BFI 2013: 17). However, like manufacturing expenditure, the attainment of ~£59m can be considered more substantial, proportionally, when it is compared with the UK box-office revenue achieved by all British independent movies; taking this perspective, low-budget films were responsible for ~7% of the box office revenue generated by independent domestic UK films during the digital revolution.²¹⁴ As such, while the sector's box office revenue comprised only a small fraction of total domestic box office (~0.5%), its share of all UK independent films during the period was more significant (~7%).

²¹² These numbers have been obtained from IMDb, Film File Europe and others listed in Chapter Two. They have, in some random cases, also been cross-referenced with Companies House reported financial statements (Chapter Two).

²¹³ The £10,769m box office total was based on the UKFC/BFI totals published in their *Statistical Yearbook* (2013: 14).

²¹⁴ These ratios are also based on *Statistical Yearbook* totals, but in this case for films defined as a 'UK independent' films (BFI 2013: 184). The ~7% does not include box office revenue by 'inward features (single country)' or 'co-productions (excl. inward feature).

As Ilott argued, it is good practice to consider the potential market value for a movie before determining the costs that must be expended to accumulate that revenue (1996: 150; Table 1). This method suggests that it would be useful to take the low-budget sector's production cost estimate of ~£554m, and the box office revenue estimate of ~£59m as a ratio; when this is done, the result is a ~10% revenue-to-cost ratio. It should be clarified that this ratio is not a precise measure of return on investment in low-budget films; a more precise calculation of return on investment would require taking into account not only theatrical receipts, but also an accurate estimate of non-theatrical revenue, as well as the fees paid to distributors and online exhibitors. Nevertheless, this ratio can still yield insight by comparison with the ~70% revenue-to-cost ratio for the entire UK film industry (£10.8b/£15.3b) and the ~31% revenue-to-cost ratio for the independent UK film industry.²¹⁵ This is because, even though the ~10% estimate was likely unprofitable for the investors involved, and was significantly lower than the ~70% box office revenue-to-cost ratio achieved by the industry as a whole and even than the ~31% ratio attained by independent UK-made films, it was further indicative of the traditional release distribution trends noted in the last chapter since traditional sources of revenue could not have been a source of further reinvestment for the rise in production. In fact, low-budget films that were likely to have been bonded (\geq £1.0m) had a ~14% revenue-to-cost ratio, whereas non-bonded films ($<$ £1.0m) had an ~8% revenue-to-cost ratio. These, along with the industry (~71%) and independent film (~31%) revenue-to-cost ratios, might be more indicative of the degree of influence that higher-budgeted films with larger marketing budgets might have in securing higher levels of engagement than they are of economic contribution; a possibility that is discussed further in the next chapter.

²¹⁵ The totals used to calculate this ratio are based on the *Statistical Yearbook* estimates published by the UKFC/BFI from 2000 to 2012. In particular, the total box office revenue used of £806m was obtained from the annual total listed under UK independent films in the 'Country of Origin of Film Releases' tables and the total manufacturing expenditure estimate was based on the sum total of 'Domestic UK' films budget trends (2014: 17, 186).

It is also worth noting the sector did achieve box office revenue from foreign markets (Figure 40). This equated to an additional ~£54m from 2000 to 2010 for a total of ~£113m for world-wide box office revenue. Though in 2000 world-wide box office revenue was £5.2m and this amount roughly doubled to £10.9m by 2010, fluctuations occurred in the intervening years; most notably, there was a peak of £27.9m in 2002, which was primarily (78%) due to three films: *The Magdalene Sisters* (2002), *Dog Soldiers* (2002) and *My Little Eye* (2002); apart from this outlier, however, the relatively stable number of films that had a traditional release, showed only small fluctuations around £8m–£10m. Broadly, these changes were paralleled by the fluctuations noted by the UKFC/BFI in the box-office revenue of independent UK films not affiliated with a studio (BFI 2011: 11).

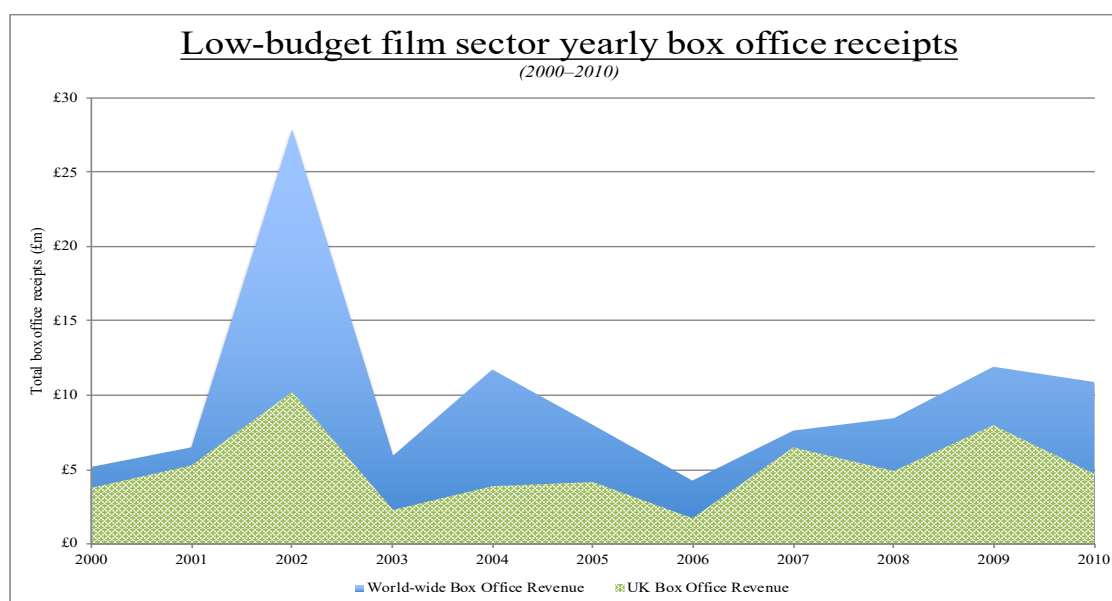


Figure 40 - Yearly box office receipts for UK low-budget films

These data illustrate the modesty and instability of the revenue stream the low-budget sector had during the digital revolution. However, as Jones and Jolliffe point out, this situation was not unique to the sector (2006: 152). The British movie industry has always been dependent on a small number of successful films each year, so it is not surprising that box

office revenue for the low-budget sector matched the same heuristic ‘80/20’ rule, whereby most of the revenue is attained by a relatively small number the films, which had also described the industry as a whole. However, with production expanding, but the number of films that were theatrically distributed remaining relatively stable, it is not surprising to find that the cumulative expenditure of the sector grew faster than the cumulative box office revenue, even though the average cost per film was decreasing (Figures 33 and 41). Box-office receipts did rise somewhat, but not sufficiently to have improved the financial viability of the low-budget sector alone nor enough to have been a factor in the growth of production.

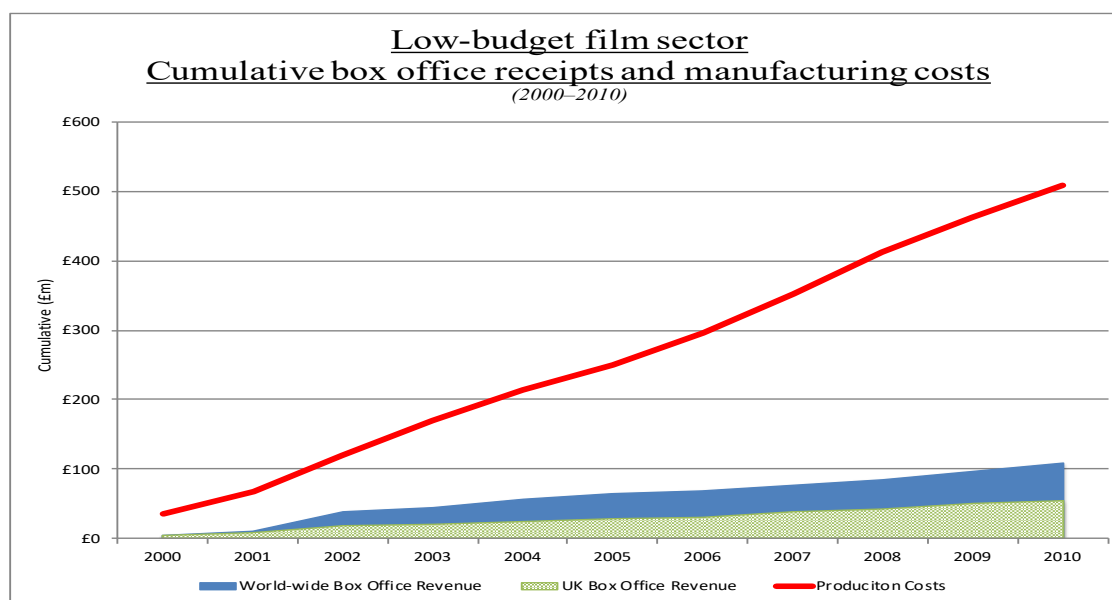


Figure 41 - Cumulative box-office receipts to production costs

While it is unlikely that box office revenue was a significant financial asset on its own, cinematic distribution may have still been an important component in the marketing of a small number of movies; if implemented properly, this could have improved the total economic contribution of the films from IPRs. Media economists such as Finney (2010: 86), Wasko (2007: 105) and Vogel (2007: 88) have all discussed the theory that theatrical distribution can be a useful ‘loss-leader’, used to improve the sale of DVDs as well as

increasing revenue-generating opportunities from other IPRs. Their conclusion on this point seems to be supported by the data presented in this study that show that 89% of all movies that were theatrically distributed—including those that were ‘four-walled’—were also released in DVD format.²¹⁶ This is not surprising, since only 2% of those films generated more box office revenue than their original costs. Not only did low-budget producers have a poor chance of gaining a theatrical distribution; even those who did would have little choice but to also use other exhibition formats. Thus, it would be useful to assess the amount of revenue that was derived from the sale of DVDs, cable transmissions, terrestrial broadcasting, online legal: fee and online legal: free revenue; unfortunately, however, as already mentioned, confidential data of this type was not publicly accessible, making a more accurate assessment impossible.²¹⁷

However, the press did report cases of films making a financial return from sponsorship, DVD sales and other IPRs that suggest other types of economic contribution. One example is the movie *Powerless* (2004), whose £5k budget was reported to have been funded mostly by product placement deals with BMW, Tesco and Sony PlayStation (BBC 2004).²¹⁸ After showing the film at several festivals and a premiere at the Mann Theatre in Los Angeles, the producer undertook a DVD campaign, resulting in a net profit to the production firm that helped fund the production company’s next film, *Finding Their Feet* (2009) (ibid.). The films *Weekend* (2011) and *Archipelago* (2010) were also reported to have achieved a level of revenue return for their producers, even though they never gained a UK cinema release (IMDb Pro 2014).²¹⁹ The movie *Shank* (2010), on the other hand, did have a theatrical release that preceded its DVD campaign. Made in London, this crime/action film cost ~£385k and

²¹⁶ The term ‘four-walled’ means when a producer or distributor hires a theatre for a duration and receives all the box office revenue.

²¹⁷ Online legal: free revenue would potentially come from advertising revenue.

²¹⁸ The term ‘product placement’ means branded products displayed in a film after the brand-owner has paid a fee to the producer.

²¹⁹ The film *Weekend* (2011) did gain a US theatrical release in September 2011.

made global box office revenue of ~£550k (Boxofficemojo 2015); however, despite this initial achievement, it is improbable that the production company gained a return before DVD sales began to be realised.²²⁰ Similarly, other films such as *Tyrannosaur* (2011), *The Disappearance of Alice Creed* (2009), *Ill Manors* (2011) and *Anuvahood* (2011) were also likely to achieve financial returns from their IPRs only following theatrical releases (IMDb Pro 2014). This seems to substantiate the views of Finney, Wasko and Vogel that a theatrical release can be useful in improving the long-term distribution revenue of a film either from the sale of other IPRs, or from advertising and/or sponsorship. This also suggests the possibility that the revenue generated from DVD sales, online viewing and from other IPRs might often be higher than the box office revenue estimate noted earlier.²²¹ Considering the move of the low-budget sector towards new online forms of exhibition, if this hypothesis were proven it would indicate that a higher percentage of films were financially viable than the previously discussed evidence indicates, and that the low-budget sector would have brought a greater MEA to the domestic film industry.

7.2 Cultural contributions

The evidence confirming that the low-budget sector contributed an amount of the economic activity to the UK film industry also supports the idea that the sector may have made a cultural contribution to British cinema. Indeed, the fact that 1,451 low-budget movies were made during the digital revolution, many of which were screened to paying audiences around the world, is itself enough to suggest that some level of cultural value was made. In Chapter Two it was noted that *Stories we tell ourselves: The Cultural Impact of UK 1946–2006*

²²⁰ This is based on the calculation that, as a minimum, box office revenue would need to be at least four-to-five-times the amount of a film's budget before any possibility of a financial return could be achieved (Crissey 2011).

²²¹ As noted in Chapter Six, in regard to films that were distributed via the DVD format, in percentage terms this decreased from 67% to 15% between 2000 and 2012, and in absolute terms 822 productions were found to have a DVD release. In regard to films that were eventually distributed via online legal: free downloads, in percentage terms this increased from 0% to 41% between 2000 and 2012, and in absolute terms 111 productions were found to have been released via the online legal: free format.

(UKFC 2009) used a number of approaches to both quantify and measure the cultural contribution of British films and, based on this precedent, this thesis will adopt some of those measurements. Therefore, to assess the cultural contribution of the low-budget sector, this section will review four separate, but interconnected, cultural benefit elements: the level of public recognition received via participation in film festivals; the level and extent of audience reach achieved by all the low-budget films made during the period; and the contribution the low-budget film sector made to widening diversity in stories told (including genre, sub-genre and ratings) and talent; and certain notable productions. The focus will be on the 'directly and quantifiably measurable' cultural contribution low-budget films made and how that impact might have been beneficial for the British movie industry.

7.2.1 Film festivals

As output increased and producers, especially those who were unable to obtain a traditional exhibition, became more reliant on self-distribution and online legal: free views, there was a marked rise in the number of film festivals held annually and in the number of low-budget films screened at those festivals. These were important developments from a cultural viewpoint, but before assessing their implications for the low-budget sector it is necessary to consider why festivals are established and why a festival screening is an essential delivering sub-process task/objective for low-budget producers (Table 5).

Film festivals are usually set up to increase tourism and promote the cultural prowess of their sponsors. They do this by celebrating the artistic merits of films via the screening of movies, often based on certain themes or on genres (Sci-fi-London Film Festival and Horror-on-Sea Film Festival), or on ethnicity, religion or the sexual orientation of the characters (UK Jewish Film Festival, UK Christian Film Festival, Black International Film Festival, London LGBT

Film Festival). They may also focus on retrospectives (Hitchcock Fortnight) or on a single region (Africa in Motion Film Festival, Romanian Film Festival). Film festivals also tend to be helmed by an artistic director, use juries to select award recipients and describe movies by their country of origin in promotional material. Cultural attributes such as these explain why film festivals are considered ‘cultural events’ and why they offer low-budget producers a platform on which to contribute to British cinema (Simens 2003: 336).

One of the reasons why a festival screening is a key task/objective for low-budget producers is that festival organisers promote the films in their programme and pay all the related marketing costs. This publicity can be useful to producers with limited resources and can be substantial enough to influence the level of public awareness about a production (ibid.: 44). Given that this awareness about a movie often correlates with the level of effect that it has on society, publicity can be a major factor from a direct cultural-benefit perspective. The marketing conducted by festival organisers offers producers the chance to screen their movies to a larger audience and to make a greater cultural impact than would be possible otherwise. It also allows better assessment of the market value of their films based on the response of festival audiences (Jones 2003: 479). Cultural and economic benefits are interrelated in this situation; the reactions of audiences, the types of accolades received, and the reputations of festivals involved can affect both a movie’s societal influence and its perceived value to prospective buyers. This is why acquisition executives join enthusiasts and critics in attending the top festivals, and is the basis for Jones’ suggestion that the more prestigious the festival, the more likely it is that a film screened at that festival will increase both its perceived cultural and economic value (ibid.).

Festival screenings can, of course, have negative consequences for the producer since all box office revenue is retained by the organisers and distributors can be deterred from acquiring the IPRs to movies that undertake lengthy festival campaigns since their box office revenue opportunity is likely to be compromised. Producers who place a higher value on *ars gratia artis* aims and simply wish to screen their films at festivals so that they will be seen and appreciated can therefore find themselves in conflict with agents who have only business aims. In fact, the lack of a financial return for both the producer and distributor illustrates some similarities between festival screenings and legal: free forms of exhibition; neither is controlled by the studios; except for the possibility of advertising revenue neither often brings financial returns to producers and both circumvent a fragmented distributor network.

Given the importance of festivals to low-budget producers, it was fortunate for them that the number of annual film festivals rose with the rise in the sector's output. At a global level there was a 122% increase from 2000 to 2012, to the point where there were just over 3k active festivals (both physical and online) in >50 countries.²²² Data published by the British Council indicates that in 2000 the UK had 67 annual events, but that by 2014 this total had risen to 234 festivals.²²³ Many of these events were established to reflect the various ways in which society had become more diverse, while studio output remained relatively constant in its thematic diversity. Niche-audience events were established, particularly those with Lesbian, Gay, Bisexual and Transgender / Transsexual (LGBT) themes, such as the Rainbow Film Festival in Shrewsbury (2006), and those with Black, Asian, and Minority Ethnic (BAME) themes, such as the Black Int'l Film Festival in Birmingham (2005) and the London

²²² Over 6,000 festivals were listed in 2012 as being held annually around the world (Withoutabox 2012). A random sample of those listed indicated 55% were established after 2000, resulting in a 122% growth. However, it is also recognised that Follows' totals indicate the number of festivals was ~10k and ~75% of them had been started after 2000 (2013); and that the British Council listed ~1,300 annual festivals. For this study a more conservative representation was derived by using the ~3,000 festivals listed on FilmFocus.org and IMDb online data on 30/01/17.

²²³ These numbers include cultural arts events that had a feature-film programme.

Indian Film Festival (2010). There was also growth in festivals dedicated to specific genres, such as Sci-Fi-London (2002), the Abertoir / Wales International Horror Festival (2006), FrightFest (2002), and in festivals bringing cinema to regions once ignored by the wider industry, such as the Berwick Film & Media Arts Festival (2004), the Cornwall Film Festival (2001) and the Norwich Film Festival (2009). Student-themed and social justice-themed festivals such as the Zoom International Young People's Film Festival (2006) and the UK Green Film Festival (2011) were also part of this trend.

The increase in festivals held around the world was also accompanied by a rise in the overall yearly number of times low-budget features were shown at these cultural events. This trend can be observed in the data collected for this thesis indicating that the number of festivals that screened at least one low-budget film increased five-fold over an eight-year period, from 108 in 2000 to 534 in 2008 (Table 17). When all of the low-budget feature-length films made during the digital revolution are considered, the data suggest that 3,676 screenings occurred out of ~36k festivals in >50 countries (Table 17).²²⁴ However, the 2:1 ratio of the number of screenings to the total number of low-budget films made is rather misleading, since not all movies gained a festival acceptance. In fact, only 66% of the low-budget films made from 2000 to 2012 were awarded entry into a festival, and of these productions, over half had only one screening. Nevertheless, a two-thirds screening ratio is an interesting ratio, suggesting that most low-budget films were of sufficient production quality to be selected and marketed by an independent organisation for paying-public exhibition and that the other third of films that failed to gain a screening might still have made a more significant contribution to British cinema if they had received more development support (Northern Alliance 2008: 15).

²²⁴ A festival might appear more than once in this total since it is possible that it might have screened more than one movie in a year.

FILM FESTIVAL AWARD PERFORMANCE PROFILE					
<i>(2000–2012)</i>					
	Number of festivals attended by films made in year	Ratio of festivals attended to films made in year	Number of award nominations received in those festivals (NB not including wins)	Number of award wins received in those festivals	Ratio of nominations and awards to films
2000	108	<i>1.8</i>	50	56	<i>1.8</i>
2001	141	<i>2.1</i>	69	93	<i>2.4</i>
2002	328	<i>4.4</i>	120	106	<i>3.1</i>
2003	289	<i>3.3</i>	78	79	<i>1.8</i>
2004	366	<i>4.1</i>	104	112	<i>2.4</i>
2005	373	<i>3.7</i>	55	92	<i>1.4</i>
2006	391	<i>3.6</i>	70	105	<i>1.6</i>
2007	423	<i>3.6</i>	59	84	<i>1.2</i>
2008	534	<i>3.8</i>	119	157	<i>2.0</i>
2009*	434	<i>2.8</i>	110	115	<i>1.5</i>
2010*	289	<i>1.8</i>	76	73	<i>0.9</i>
2011*	312	<i>1.7</i>	67	76	<i>0.8</i>
2012*	32	<i>0.2</i>	4	6	<i>0.1</i>
Total	3,676	<i>3.1</i>	910	1,072	<i>1.7</i>

*NB: verifiable data for 2009 to 2012 was not available, totals represent number found.

Table 17 - Film festival award performance profile

Later in this chapter some of the movies that comprise this two-thirds will be discussed. At this point it is worth clarifying that the number of festivals attended by low-budget films was higher than the number of low-budget films produced—even despite the fact that a third of the movies produced had no festival appearances at all. This can be explained by the fact that some of the films that did appear in festivals appeared in more than one. In fact, some films had quite long festival campaigns: 267 of the films participated in five or more festivals, and of those films, 103 were screened in ten or more festivals. This does not, however, necessarily signal that these movies would become more financially successful in distribution than those that did not screen in a festival or only had one festival premiere. There were numerous movies that never appeared in a festival but went directly into distribution after production. For instance, films like *Rise of the Footsoldier* (2007), *Grow*

your Own (2007), *High Heels and Low Lifes* (2001) and *The Firm* (2009) all gained a level of commercial distribution without first securing a festival screening.²²⁵

Furthermore, many accolades were amassed by the two-thirds of films that were screened in festivals. Since such awards are likely to have been determined by artistic merit and by an independent jury, the number of accolades accumulated can be used as a measure of audience acceptance and cultural representation. As was already argued, based on the premise that awards provide more opportunities to experience culture (Chapter Two), the more awards a film gains the more it is deemed to have contributed to British cinema for the purposes of this thesis. Therefore, the 3,676 festival screenings achieved by the sector constituted a representation of British cinema since they not only brought low-budget films to a global audience but gave these movies the chance to be judged in competition with films from other nations. In this respect the UK low-budget sector did have some success, since it was able to collect 1,072 nominations and 910 awards from those appearances (Table 17).

In terms of festivals attended on a global level, English language-based festivals were the most preferred venues, for these films, especially those held in the UK (38%) and in the US (17%), but non-English language-based festivals were also popular, with France (14%), Italy (7%), Germany (5%), the Netherlands (5%) and Spain (5%) being the most frequently listed.

Of the best-established festivals in the UK, the Edinburgh International Film Festival (EIFF) was the most-attended by low-budget producers during the years under study. The EIFF is the world's oldest continually running film festival and it owes much of its reputation to the commitment it has shown to debuting new British talent (EIFF 2013). During the digital

²²⁵ Commercial distribution includes any form of revenue generating exhibition, including theatrical, DVD and online.

revolution the organisers of the EIFF not only proved this commitment by presenting 115 low-budget films either as world premieres or as UK premieres, but in so doing helped to launch the directorial careers of Paul Andrew Williams, David Mackenzie, Tom Muschamp and Jan Dunn. Furthermore, films such as *Monsters* (2010), *Dead Man's Shoes* (2004), *16 Years of Alcohol* (2003) and *London to Brighton* (2006) all received either their UK or world premiere showings at the EIFF. Other globally recognised British festivals, during the same period, were also venues for low-budget film screenings and for promoting British talent. The Raindance Film Festival also proved to be popular—second only to the EIFF, with 68 premieres—but the Portobello Film Festival (26) and festivals in Leeds (16), London (21), Glasgow (14), Swansea (9), Belfast (5) and Cardiff (5) were also major exhibitors. This list, however, is not complete, since it includes only UK-premiere screenings and ignores movies that were given their world premieres in foreign festivals; thus, there were more UK festivals that had low-budget films in their programmes.

The UK low-budget sector was also modestly successful in obtaining screenings at some of the most prestigious festivals elsewhere in the world. For the purpose of this study, this group of ‘top film festivals’ includes the Toronto International Film Festival (TIFF), the Berlinale, the Cannes Film Festival, the Sundance Film Festival, the Tribeca Film Festival, the International Film Festival Rotterdam (IFFR) and the Venice International Film Festival (VIFF). During the digital revolution, TIFF topped this group, by screening 67 low-budget films; 40 films were shown at the Berlinale, 30 at Cannes, 28 at Sundance, 14 at Tribeca, 14 at the IFFR and seven at the VIFF (Table 18). These figures also show that those festival-exhibited films had a higher release rate than the rest of the low-budget sector, supporting the hypothesis that screening at these events is beneficial to a film’s reputation. However, before examining this finding, it will be useful to re-consider the rates of traditional forms

of distribution shown earlier for both domestic and foreign releases, and how they fell with the rise in output and with the shift to other forms of online exhibition (Figure 35). During this time, the entire sector achieved an 18% overall rate for domestic theatrical distribution; in contrast, 33% of the films that were accepted by a top festival went directly to domestic theatrical distribution, with 37% going directly to DVD, 3% directly to TV and 27% never being commercially distributed in the UK market (including online legal: free release). As for foreign distribution, 17% achieved a foreign theatrical release and 79% gained some form of distribution in a foreign territory (Table 18).

DISTRIBUTION RESULTS <i>(low-budget films attending the 'top seven' film festivals)</i>							
Festival	Domestic Theatrical	Domestic DVD Only	Domestic Television	Domestic ND/Free	Domestic Total	Foreign Theatrical	Foreign Total
TIFF (Toronto)	31	21	3	12	67	7	56
Berlinale	11	20	1	8	40	4	27
Cannes	17	23	2	27	30*	14	29
Sundance	8	13	1	6	28	4	20
Tribeca	5	5	0	4	14	1	10
IFFR (Rotterdam)	5	4	0	5	14	3	8
VIFF (Venice)	3	2	0	2	7	2	9
TOTAL (%)	33%	37%	3%	27%	100%	17%	79%
*NB: Sixty-nine films did publicly register an attendance at Cannes, but it is likely this is not an accurate total since at least half of these films were represented only at the Cannes Film Market. Thus, a more conservative estimate of 30 films has been used in this analysis.							

Table 18 - Distribution results of films attending the top seven film festivals

When comparing the total average UK commercial distribution rates for the low-budget film sector (18% for theatrical exhibition and 51% for all formats), with the corresponding rates for low-budget films that were first shown at a top festival (50% for theatrical exhibition and 85% for all formats), it is clear that films that gained acceptance into these top festivals achieved a higher distribution rate (Figure 35 and Table 18). This finding, however, needs to be contextualised by the fact that the data used to estimate the overall low-budget sector's 18% theatrical distribution rate was based on sources that were likely to have had a number of four-walled productions (Figure 35); admittedly a weakness in the data used in this study. It would therefore be prudent to view the UKFC/BFI estimates of 3% to 5% for UK theatrical

distribution, since they were based on confidential box-office data that was not available for this study (UKFC 2007).²²⁶ When using this lower estimate it is found that when a low-budget film was screened at a top festival it was five to six times more likely to be theatrically distributed in the UK and 34% more likely to be non-theatrically distributed in the UK than the average film not accepted into those festivals.

7.2.2 Audience reach

As noted by the rationale provided in Chapter Two, another way to assess cultural benefit is to consider audience reach. This idea is multifaceted and based on the hypothesis used in *Stories we tell ourselves: The Cultural Impact of UK 1946–2006* (UKFC 2009: 9), that a movie's cultural impact on society can be approximated by measuring the level of public interaction and/or the level of discourse it generated. For this assessment, several different perspectives were developed using the number and type of ratings and reviews posted on the IMDb and Rotten Tomatoes online databases (Table 19).²²⁷ The first of these perspectives retains the earlier focus on festivals by comparing IMDb rating totals with premiere location data. Substantial differences can be found between movies shown at a top festival, those that were shown in other festivals and those not shown at any festival: of the 187 movies that premiered at one of the top festivals, 551,154 IMDb users gave a rating; of the 666 films that were shown at other festivals, 400,384 users provided a rating; and of the 578 movies that never received a festival screening, only 104,013 users gave a rating (Table 19). Audience-reach levels based on IMDb user ratings are therefore strongly associated with festival participation rates: films that premiered at one of the top festivals had over four times the number of ratings (433% as many) than the other low-budget movies first shown at other

²²⁶ The UKFC/BFI had access to box office revenue data via an arrangement with Rentrak. These data were based on actual ticket sales and revenue reporting by the cinemas. Until December 2009 Nielsen EDI provided these data to the UKFC/BFI, but Rentrak acquired Nielsen EDI and became the sole provider of worldwide box office ticket-sales information.

²²⁷ As with all the data selected for this study, these data were selected because it was available and could be measured (Chapter Two).

festivals (3,079 vs. 711), and movies shown in other festivals had almost twice the average number of ratings (178% as many) than those that were never screened at a festival (711 vs. 400) (Table 19). Given that festivals can be viewed as both cultural and marketing events, it was clearly culturally and economically beneficial for producers to have their films screened at a festival; they often gained further opportunities to gain an audience and make a cultural impact on society. This is not unexpected when one reconsiders the higher distribution rates for films that attended a top festival; nevertheless, in identifying an association between a producer’s decision to screen his or her film at a festival and the higher audience-reach level that is likely to have resulted, the results still suggests the sector made a cultural contribution.

FESTIVAL PARTICIPATION AND AUDIENCE FEEDBACK <i>(2000–2012)</i>						
Film Group	Number of Films	Number of IMDb Raters	Average number of IMDb Raters	Average IMDb Rating	Average RTR*	Average RTRAS*
Top Festivals	187	551,154	3,079	6.0	0.6	0.55
Other Festivals	686	400,384	711	5.4	0.5	0.44
No Festivals	578	104,013	400	5.1	0.3	0.38
*NB: RTR = Rotten Tomatoes Rating (Tomatometer), RTRAS = Rotten Tomatoes Rating Audience Score						

Table 19 - Festival participation and audience feedback

It is worth noting that this finding does not confirm that a top festival screening, or any film festival screening for that matter, guaranteed a successful traditional exhibition or extended audience reach. There are numerous instances in which low-budget movies with successful festival campaigns were unable to secure commercially successful distribution contracts, but might nevertheless have made cultural contributions. One of the more extreme examples of a film that had a notable festival campaign, but according to public records did not have a theatrical release, is Laura Amelia Guzman’s *Cochochi* (2007). Described by the director as a family drama about two brothers growing up in the northwest of Mexico, this co-production was screened at 63 festivals around the world over a three-year period, including

the 2007 VIFF, the 2007 TIFF and the 2008 IFFR.²²⁸ It also won 11 awards, such as the 2007 TIFF Discovery Award, and was nominated for 11 others. Despite this critical acclaim, however, the film never achieved any box office revenue.²²⁹ This finding is supported by IMDb data which indicates that twelve years after it was shown in a festival, only 801 user ratings had been recorded, the production company was still listed as its only sales agent and only Region 4 DVDs were distributed. An apparent disconnect between cultural benefit and commercial performance was also evident in Ritu Sarin's 2005 film *Dreaming Lhasa*; it, too, was accepted by many festivals—47 in total, including the 2005 TIFF—and gained acclaim with a nomination at the 2005 Kerala Int'l Film Festival. Nevertheless, like *Cochochi*, *Dreaming Lhasa* never opened in a UK cinema and only had a brief release in Romania, despite having the long-established HanWay Films as its distributor (total box office US\$13,125.00). Even after twelve years and a lengthy festival campaign, it had just 219 IMDb user ratings, indicating that it, too, had a limited audience reach as well as a poor box office performance.

It is possible that the producers of *Cochochi* and *Dreaming Lhasa*, as well as those who made the 30 other films that did not gain a traditional distribution after being exhibited at top festivals, never intended to distribute their films commercially in the first place, and that they were motivated by *ars gratia artis* reasons alone. This is not a likely reason, however, since most of the major acquisition executives would have attended the top festivals, would have assessed their commercial potential and purchased their IPRs if they had thought a profitable market existed. Undoubtedly films like *Cochochi* (2007) and *Dreaming Lhasa* (2005) have directly measurable artistic merit, but what is clear is that during the digital

²²⁸ I should be noted that *Cochochi* (2007) was listed on both Film File Europe and IMDb as a 'Mexico, Canada and UK co-production', but no co-production agreement existed between Mexico and the UK at this time. Furthermore, it is interesting to note that the film did not receive any direct public sector agency investment.

²²⁹ Rentrak had a \$0 revenue total for *Cochochi* (2007).

revolution a lengthy festival tour—even one that included top festivals—could sometimes constitute the main or only measurable cultural contribution made to British cinema.

Another audience-reach-related question that should be addressed before quantifying the net cultural contribution that might have resulted from low-budget films during the digital revolution is whether audience levels rose as a result of the rise in output detailed in Chapter Three. In addition to offering a view on audience reach levels by type of festival attended, the IMDb data can be used to test the hypothesis that higher output led to higher audience reach for the low-budget sector overall. Earlier it was explained why consumption levels do not always move in accordance with manufacturing levels in the film industry and how low-budget producers began to bypass most of the historical barriers-to-entry that once prevented them from taking their films to market by resorting to festivals and self-distribution (Chapter Six). It is therefore uncertain whether these economic factors had any impact on the sector's ability to expand its audience reach. In fact, after arranging the IMDb data according to yearly trends and sorting it into distribution sub-categories, it is still not clear whether overall audience reach was improved by these new modes of distribution. While there was a small overall rise, this conclusion must be prefaced by the observation that the annual totals fluctuated considerably from one year to the next. Much of the rise can be attributed to a few films that were distributed via traditional exhibition channels. This can be seen in how the average number of user ratings rose by over 200% in the first three years of the decade (533 in 2000, 933 in 2001 and 1,671 in 2002), then fluctuated every other year until 2008 before falling to levels similar to those gained in 2000 for the years that followed (Table 20).

AUDIENCE REACH BASED ON IMDb RATINGS (on 01/01/13)					
(2000-2012)					
	Number of IMDb user ratings	Average number of IMDb user ratings for films produced	Number of IMDb user ratings for films that were traditionally distributed	Number of IMDb user ratings for films that were self-distributed and/or had an online legal: free download	Percentage of the total of IMDb user ratings for films that were self-distributed and/or had an online legal: free download
2000	32,007	533	32,007	0	0%
2001	62,521	933	62,500	21	0%
2002	123,674	1,671	117,167	6,507	5%
2003	48,959	563	47,828	1,131	2%
2004	134,849	1,498	134,157	692	1%
2005	61,487	603	58,855	2,632	4%
2006	116,708	1,061	113,551	3,157	3%
2007	59,516	504	55,279	4,237	7%
2008	149,784	1,070	145,145	4,649	3%
2009	97,037	626	95,276	1,761	2%
2010	82,313	499	79,709	2,604	3%
2011	85,357	464	81,922	3,435	4%
2012	1,339	7	1,339	0	0%

Table 20 - Audience reach as measured by IMDb user ratings

Much of the fluctuation in the average of IMDb user ratings can be explained by the presence of a small number of films that each had >10k ratings (Table 20). The average number of ratings for the films surveyed in this study was 1,053, but only 31% of the movies had any ratings. This skew was especially evident in the years that had higher than usual rating rises. In particular, four films accounted for 59% of all the user ratings submitted for films made in 2002. These were: *Dog Soldiers* (2002); *24 Hour Party People* (2002); *The Magdalene Sisters* (2002); and *Bloody Sunday* (2002). In 2004, just five films accounted for 73% of the ratings: *Cashback* (2004); *Dead Man's Shoes* (2004); *The Football Factory* (2004); *9 Songs* (2004); and *It's all gone Pete Tong* (2004). Only two films—*This is England* (2006) and *Kidulthood* (2006)—comprised 50% of the 2006 ratings, and three films—*Bronson* (2008), *Hunger* (2008) and *Lesbian Vampire Killers* (2008)—made up 37% of the 2008 ratings. Those fourteen films not only constituted the bulk of the 22 films that gained over 10,000 IMDb user ratings in the films surveyed in this study, but also share other traits that might indicate how they achieved higher levels of audience reach. For instance, all 22 films, except for *Lesbian Vampire Killers* (2008), had a cinema release (78% a domestic release, 74% a foreign release and 61% gained both a domestic and foreign release); 78% were made with

35mm film; 61% were made with public-sector investment; 74% had an online legal: fee download, and 61% had an association with one of the broadcasters. Collectively they accounted for 32% of the sector's UK Box Office returns and 41% of its foreign Box Office returns. Only 13% had been uploaded illegally online, all were available in DVD format and 65% were likely bonded films made for over a million pounds.

The results of this analysis corroborate the hypothesis that the level of audience reach is dependent on the amount of distribution/marketing expenditure that accompanies a film's screenings. Since this type of cost is used to support commercial theatrical releases and DVD releases, it is likely that this was the reason why this elite group of films was able to achieve higher than average audiences. These results also seem to indicate that an effective level of marketing expenditure was spent on promoting these films; 21 out of 22 of them were released theatrically and on multiple exhibition formats that were often financially supported by the PSBs. The disparity in audience levels that existed between films with marketing budgets and those that did not have access to these funds can be deduced from the poorer IMDb user ratings achieved by films that were self-distributed and/or legal: free downloads (Table 20). Despite web-based platforms providing the public with greater access to these productions, they were less often rated by IMDb users; only 3% of self-distributed films had any significant number of reviews (Figure 42). The implications of these findings are that the increased use of these types of exhibition models did not have any impact on growing audience reach levels. As output rose, audience reach for the low-budget sector was, at best, expanding at a slower rate and based on a small number of films each year. Perhaps worse, online legal: free downloads may have offered producers a direct channel to consumers, but in using them producers not only gave up any chance to monetise their IPRs, they also likely surrendered those rights without achieving any improvement in audience reach (Figure 42).

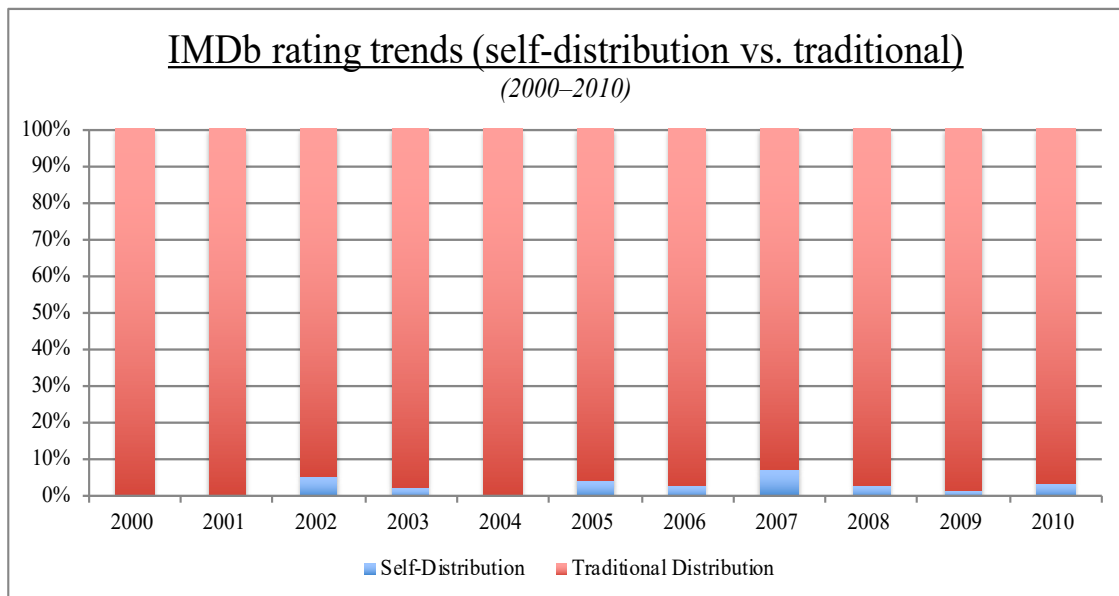


Figure 42 - IMDb rating trends (self-distribution vs. traditional)

There is another interesting trend that arises from the data derived from the IMDb user ratings. It concerns the relative consistency in the yearly average. With few exceptions, the 5.5 average IMDb user rating remained consistent, especially when contrasted with the rise in output (Table 21). In fact, the maximum deviation from this between 2000 and 2012 was -0.5, and this level of deviation occurred only once, in 2010. This stability, in what could be argued to be the only measure the sector has of quality (from a consumer viewpoint), also appears to be mirrored in other cinema fandom websites, such as the Rotten Tomatoes Tomatometer rating average of 53%, and its audience ‘liked it’ average of 55%, both of which were also relatively stable throughout the years surveyed (Table 21). The IMDb user rating of 5.5 is also interesting when put into context with the average rating of 5.6 achieved by the entire UK film industry and the 5.9 average user rating obtained by American films.²³⁰

²³⁰ The UK and global film industry estimates are based on a random survey conducted for this thesis. This analysis was carried out on 05/07/13 and was based on the IMDb user ratings of a random sample of 300 British films (excluding those that had been identified as low-budget in this study) and 300 American films. All titles were chosen randomly, using a random number generator to identify titles.

This comparison could be used to suggest that British movie consumers do not perceive the production value of the low-budget sector's films to be much lower than industry norms. Unfortunately, using this comparison alone cannot substantiate this reasoning, given weaknesses in the reliability of the research data used to estimate these averages (Chapter Two). Nevertheless, the low-budget sector's IMDb user ratings offer some data with which to measure the impact of new digital technology on audience perceptions. Overall, despite all the technological advancements noted in Chapter Four, the relatively consistent IMDb ratings for the sector indicate that audience views of quality did not substantially increase.

IMDb AND ROTTEN TOMATOES AVERAGE USER RATINGS (on 01/01/13)													
(2000-2012)													
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
IMDb User rating avg.	5.5	5.6	5.7	5.6	5.7	5.5	5.5	5.3	5.3	5.4	5.0	5.5	5.6
Rotten Tomatoes Tomatometer avg.	49%	53%	49%	50%	48%	49%	51%	48%	46%	48%	47%	50%	53%
Rotten Tomatoes Audience 'liked it' avg.	55%	56%	58%	57%	55%	57%	57%	50%	53%	52%	50%	53%	55%

Table 21 - IMDb and Rotten Tomatoes average user ratings

7.2.3 Expanding diversity in narratives and talent

There is also evidence that indicates that the low-budget sector likely broadened its narrative portfolio during the digital revolution, in terms of its use of genres, sub-genres, ratings and the talent involved; if so, this would therefore seem to indicate that the low-budget sector readily adapted to a changing society in ways not addressed by the rest of the industry, and in this way made a cultural contribution to British cinema.²³¹ Indeed, the data support this possibility, in that previously seldom-explored themes based on class, sexuality, race, immigration and social identity were increasingly being explored by low-budget producers during the period as the transformation to digital technology progressed.²³² Possible reasons

²³¹ These findings also seem to coincide with some of Leggott's observations, particularly on representation of ethnicity and how the 2000s were 'more receptive to the experiences (and problems) of multicultural Britain' (2008: 105).

²³² The rationale used to explain the inclusion of this measurement has already been discussed in Chapter Two and is based on the approach used in *Stories we tell ourselves: The Cultural Impact of UK 1946-2006* (UKFC 2009: 9).

for this change, such as a more diverse workforce and/or a greater demand for more niche stories, will be partially explored later in this chapter. What is noteworthy at this point is that the low-budget sector did ultimately produce a remarkably diverse portfolio of movies, as producers began to connect with more niche audiences.

This analysis examines the degree to which the use of various genres, sub-genres and ratings might have evolved as production output grew, costs fell and the British population become more heterogeneous.²³³ First of all, to give an overview, the ‘average’ low-budget film made during the digital revolution was called a ‘drama’ by the producer, had a BBFC rating of 15 and had a runtime of 87 minutes.²³⁴ This single summary, however, conceals the profound shifts that occurred in the types of stories told and of how those changes altered the low-budget sector’s ultimate contribution to British cinema.²³⁵ Although ‘drama’, and to a lesser extent ‘comedy’ and ‘horror’, were the genre terms most cited by producers during this period, the IMDb data used in this analysis also indicates that the range of genres categories as defined by IMDb adopted by producers doubled from eight to sixteen (Figure 43).²³⁶

²³³ The term ‘genre’ is used here to mean any single term a producer, or authoritative source, uses to describe a movie. This definition is not intended to endorse any particular views expressed in the current discourse on defining genre but is used in this case to illustrate the storytelling trends in the low-budget sector. Appendix D has a listing of the IMDb genre categories.

²³⁴ Based on IMDb data, the running time estimate uses a mean average and the BBFC rating and genre estimates use a mode average.

²³⁵ The single genre estimate is based on IMDb and British Film Council data and uses the first genre term self-reported by producers.

²³⁶ Data for 2011 and 2012 were incomplete to the extent that they could not be used with any level of accuracy.

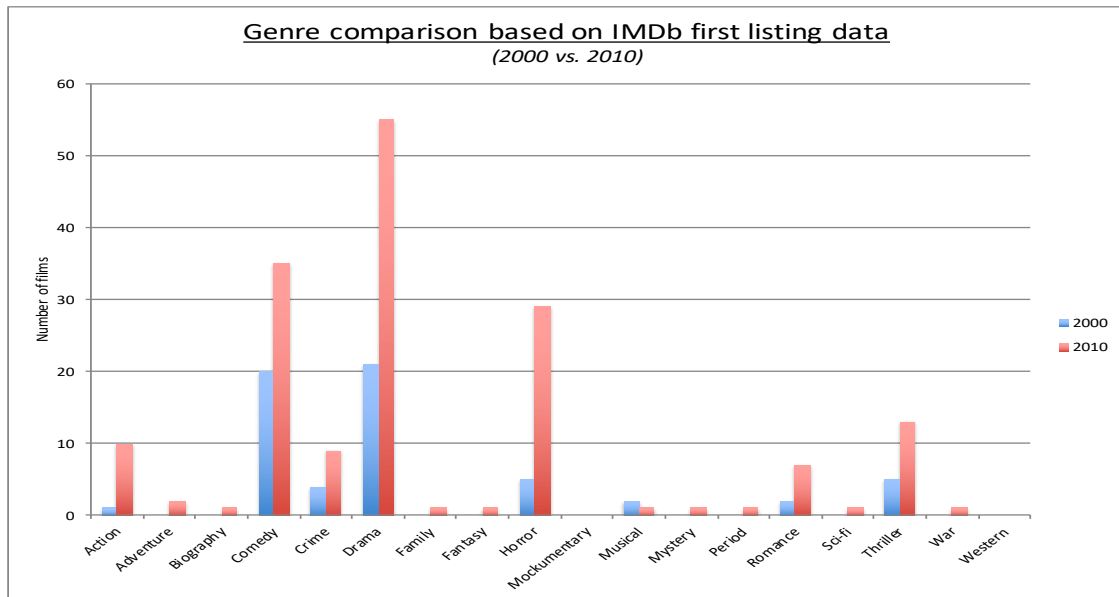


Figure 43 - Genre comparison based on IMDb first listing data

While it should be stressed that any attempt to quantify the proliferation of genres by using categories reported on websites such as IMDb can only be considered a pragmatic choice at best since it can be quantifiably measured, it is still reasonable to conclude that the sector expanded the genres of stories it told, and that in so doing it changed the type of movies it made as the digital revolution gathered momentum. As well as the usual dramas, comedies and horror films that were commonly produced by the sector during the analogue era, films with different stories, such as the biography *Nowhere Boy* (2009), the family film *My Angel* (2010), the fantasy film *the Song of King Solomon* (2011), the mystery *In the Dark Half* (2011), the sci-fi *Framework* (2009) and the war film *Blood Army* (2010), were also made.

The IMDb data used in this case also suggest that the sector broadened its storytelling repertoire to include certain non-traditional sub-genre storytelling themes related to race, sexual orientation, national identity and religion. Although the subjectivity involved in producers' categorising a movie into a single genre cannot be ignored, films with stories that prominently portrayed characters from the BAME and LGBT communities, or issues and

themes relevant to those sections of society, could be identified and, as a result, quantitatively labelled and assessed in sub-genre terms, more easily than they could be during the analogue era.²³⁷ The obvious subjectivity in labelling a film using a single genre category is due to the nature of some of the creative elements involved, and in spite of the fact that producers of such films often did not use such sub-genre labels or were unable to use them because no such terms were available.²³⁸ For instance, the term ‘gay’ was available in IMDb’s keywords section after 2002; however, sub-genre terms such as ‘BAME’, ‘Black’, ‘Asian’, ‘lesbian’, ‘LGBT’, ‘British’, ‘Welsh’, ‘Irish’, ‘Scottish’ and ‘Christian’ were not available in the keywords section during the period. When using the IMDb data for a single-genre assessment, this made it more difficult to estimate the number of these productions. There were also other complications. For example, *Dog Eat Dog* (2001) was first classified as a ‘Black Film’ by the BFI when listed in 2001 but was later reclassified in 2012 as a comedy. Similarly, *Greek Pete* (2009) and the more influential *Weekend* (2011) were first listed in IMDb as dramas even though they began to be referred to as the most influential British gay films during that time (Davidson 2014).²³⁹ Such issues notwithstanding, the IMDb data can be taken to indicate that ~18% of all the films surveyed had a central storyline or element based on a BAME theme and ~8% had a LGBT theme, since the producers of these films promoted those themes on movie websites and/or in their own publicity, using such terms as a single or primary genre listing (Figure 44).²⁴⁰

²³⁷ It is recognised that the terms BAME and LGBT lack nuance and are increasingly being amended by society, but they were used by the government, UKFC/BFI, BAFTA, PACT, BECTU and other organisations during the period and this is why they have been adopted for comparative purposes in this thesis.

²³⁸ One reason a producer might have decided not to promote their film as being a BAME or LGBT film could be because he/she might have had a desire to portray such themes within more traditional genre terminology.

²³⁹ The BFI stopped using the term ‘Black Film’ as a genre on its online database in 2013.

²⁴⁰ The 2012 estimates are based on actual data and are not an estimate.

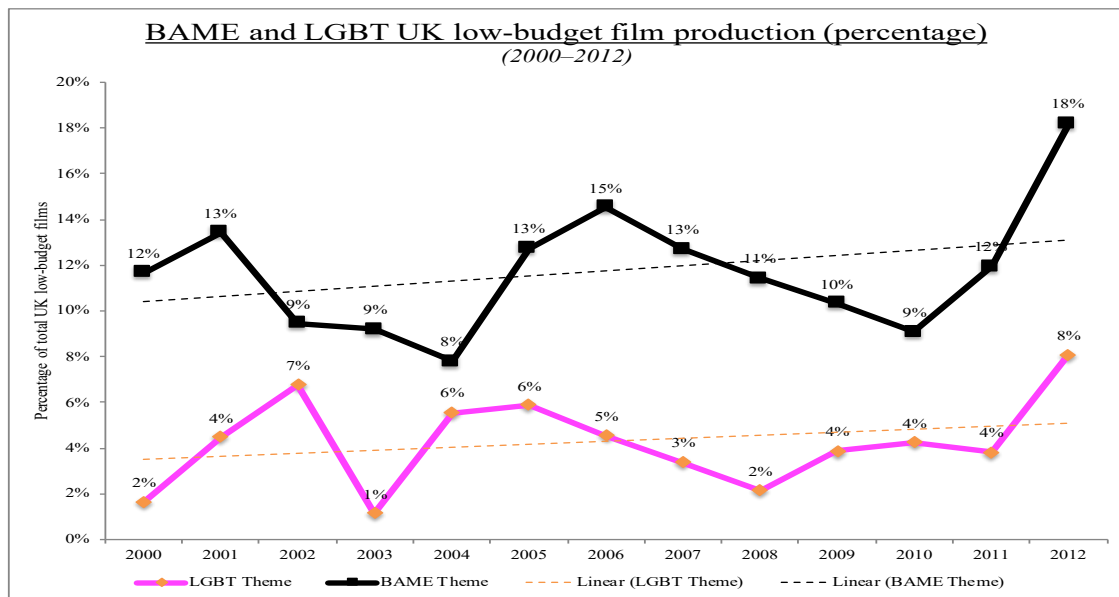


Figure 44 - BAME and LGBT theme analysis (percentage)

When considered separately, films with key characters and/or themes that represent BAME communities remained stable at ~12% of annual sector output (Figure 44). Movies with prominent LGBT characters or themes consistently formed 4% of sector output (Figure 44). While the films identified in these statistics should not be viewed as the only low-budget films that used BAME or LGBT story elements during the period, these productions do represent the movies that were promoted with such themes as central narratives. The trend of slow growth of these percentages, as production grew, also indicates a rise in the absolute number of films in these categories. Hence, BAME production rose from seven films in 2000 to 18 in 2012, and LGBT film production grew from one film in 2000 to eight films in 2012 (Figure 45). It is therefore likely that the production level for films in these sub-genres moved in line with the overall output rates of the low-budget sector, in terms of the rise in actual numbers during the latter part of the decade (Figure 45).

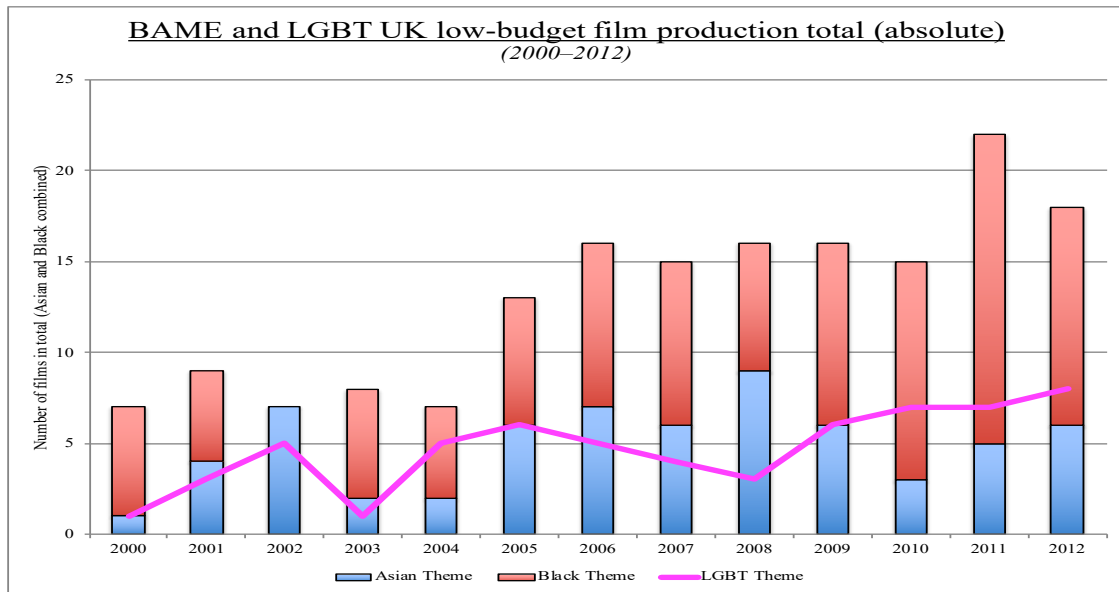


Figure 45 - BAME and LGBT low-budget film production total (absolute)

The rise in output of BAME and LGBT films does not seem to have been matched by films labelled with non-traditional sub-genre categories related to national identity and religion. While production growth in Scotland, Wales and Northern Ireland was clearly evident in Chapter Five, the movement towards more production outside the Greater London Area does not seem obvious when using the IMDb data from a sub-genre viewpoint. Aside from a relatively small number of films in indigenous languages, such as the Scottish Gaelic-language production *Seachd—The Inaccessible Pinnacle* (2007), the Welsh film *Calon Gaeth* (2006) and the Cornish film *Hwerow Hweg* (2002), only 14 films were found that were identified in terms of a genre label as Scottish or Scotland. Five were labelled as ‘Northern Irish’, ‘Northern Ireland’ or ‘Ulster’, three as ‘Welsh’ or ‘Wales’, but none as ‘English’ or ‘England’. Therefore, while more films were being made outside the GLA, no data could be found that such terms were being used as a genre or sub-genre identifier to link the film publicly with a particular region of the nation.

When assessing the BBFC age-ratings of those movies that obtained such classifications, no measurable change seems to have occurred during the period. This is because in 2000, 60% of low-budget films that obtained a BBFC rating classification were given a rating of 15, and 20% received a rating of 18; but by 2010 these ratings had not changed significantly, with ~52% of films received a rating of 15 and ~25% of films receiving a rating of 18 (Figure 46). Hence, the low-budget sector concentrated 75%–80% of its efforts on creating stories appropriate for those over the age of 15. In fact, from 2000–2010, only 38 low-budget films received a rating of 12; 21 films received a rating of PG; and only six films received a rating of U. The restriction of films’ audiences to certain age-classes, of course, can be viewed as a hindrance to expanding audience reach, as such this situation identifies a new opportunity for the low-budget sector.

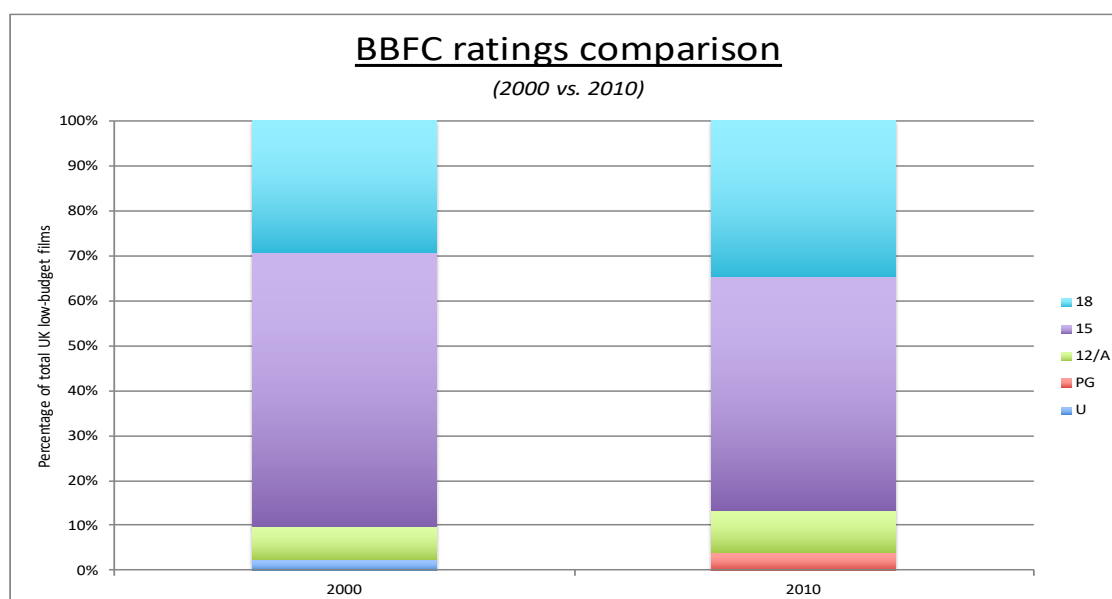


Figure 46 - BBFC ratings comparison

Another intriguing set of trends indicating that the low-budget sector might have made a, albeit indirect, contribution to British cinema relates to the level of participation of BAME people and of women in the role of director. Averaged over the whole period, BAME

directors helmed 15% of all low-budget films, and 18% were directed by women. When yearly averages are considered, both demographics show distinct increases in rates of directing. These growth trends are apparent in that Black, Asian and minority ethnic directors collectively directed 3% of the films in 2000 but 19% in 2012, and women increased their participation from 6% to 28% over the same period (Figure 47). Since the rates of these rises were significantly higher than the growth rates that were achieved by the industry as a whole, it would seem that the low-budget film sector was more conducive to encouraging diversity than the wider domestic industry as a whole, at least for directors.²⁴¹

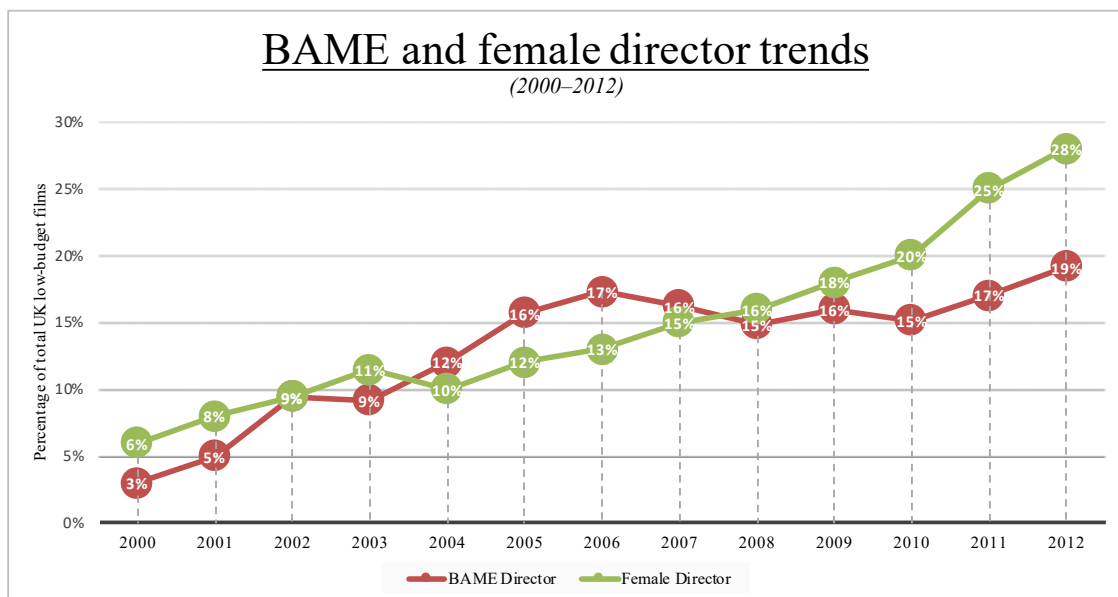


Figure 47 - BAME and women director trends

The trajectories for these trends are also telling from several other perspectives. Firstly, the 19% of films made by BAME directors compares favourably with 2012 government census data indicating that BAMEs made up 12.9% of the domestic population; thus, the low-budget sector had a higher representation of BAME directors when compared with the national

²⁴¹ Directors UK reported in 2015 that 1.5% of TV directors were BAME and the BFI reported in 2012 that 18% were women (2013).

average (ONS 2012). Notable BAME directors making up this group, who have gone on to have successful careers, include Noel Clarke (*Adulthood* 2008), Steve McQueen (*Hunger* 2008), Amma Asante (*A Way of Life* 2004), Asif Kapadia (*The Warrior* 2001) and Menhaj Huda (*Kidulthood* 2006). Secondly, the number of women directors also increased. Although the 28% of films directed by women in 2012 was lower than the 51% of women in the national population, it was nevertheless higher than the percentage for the domestic film industry overall. Women directors in this group include: Andrea Arnold (*Red Road* 2006), Lone Scherfig (*Wilbur Wants to Kill Himself* 2002), Penny Woolcock (*The Principles of Lust* 2003), Debbie Isitt (*Confetti* 2005), Alison Peebles (*Afterlife* 2003), Gaby Dellal (*Angles Crest* 2011), Eleanor Yule (*Blinded* 2003) and Sarah Gavron (*This Little Life* 2003). As such, the low-budget sector was a development arena for new BAME and women directors entering the industry, and it made a disproportionately higher contribution to the diversity for the UK film industry, in spite of the barriers-to-entry noted in Chapter One.

7.2.4 Notable productions

One further perspective on cultural contribution that is useful to adopt is a consideration of some of the most notable films that have been previously described as having made a cultural contribution. The reason for illustrating the films mentioned in this section is, therefore, to provide a further level of understanding not achievable by taking into account only the quantitative analysis presented earlier. This perspective of contribution is qualitative in nature and based on the rationale used in *Stories we tell ourselves: The Cultural Impact of UK 1946–2006* (UKFC 2009: 9). Nevertheless, it is still based on an intuitive list of films derived from the census and also considered to have merit by various academics, analysts, practitioner-authors and cinemagoers (Chapter Two).

One film that achieved an exceptional level of international recognition was Peter Mullan's *The Magdalene Sisters* (2002). Filmed primarily in Dumfries & Galloway, it depicts four teenage Irish girls who were sent to the Magdalene Asylums in Ireland during the 1960s. After being screened at the VIFF, TIFF and the London Film Festival, the movie won 16 awards, including the 2002 Golden Lion in Venice, and was nominated for 12 others, including one from BAFTA. Predictably, a Rotten Tomatoes 90% Tomatometer critic rating placed the film in the top twenty best-reviewed movies for 2002, an accolade in itself. As well as achieving this critical success, Mullan's film reminded the public's of the brutal injustice inflicted on the women who had been sent to the 'Magdalene Asylums' in Ireland, so this was not only a significant contribution to the international reputation of British cinema but also gave focus to the debate on what should be done to address this injustice. James Smith, a professor of Irish studies at Boston College, wrote that 'Mullan offsets the long historical silence' that allowed the religious and government agencies who had run and supported the laundries to 'maintain their secrecy and invisibility', a statement that validates both the artistic and societal merits of the production (2007: 138–140).

Two other movies that illustrate how the low-budget sector helped shape the international reputation of British cinema by focusing on underrepresented themes are Asif Kapadia's *The Warrior* (2001) and Kevin Macdonald's *Touching the Void* (2003). Like *The Magdalene Sisters*, the narratives of both of those critically acclaimed films are located outside the UK, but it is this very circumstance that proves the sector's boldness in telling stories that extend beyond domestic borders. In telling the tale of a feudal Indian warrior who renounces his role as an enforcer and who has to escape over the Himalayan mountains to survive, Hackney-born Kapadia used foreign locations, Asian characters and the Hindi language to challenge traditional global audience perceptions of what constitutes a British film. BAFTA

selected this feature to represent the UK in the Best Foreign Language Film category at the 2003 Oscars, but the Academy of Motion Picture Arts and Sciences (AMPAS) rejected the application on the basis that Hindi was ‘not a language indigenous to the UK’ (*Hollywood Reporter* 2002: 1). This rejection and the publicity that surrounded it caused debate among British scholars about the ‘Britishness’ of certain movies made with no other connections to indigenous culture or geography (Leggott 2008: 10).²⁴² However, despite AMPAS’s decision, this film won the 2002 Alexander Korda BAFTA award for Best British film and was nominated for the Best British Independent Film at the 2001 British Independent Film Awards (BIFA). This helped to push the boundaries further of what was then defined as British cinema. Like Kapadia’s work, Kevin Macdonald’s *Touching the Void* (2003) also expanded the historical parameters of British film, but in this case the foreign setting is secondary to the contribution the film made to the art of storytelling and the use of the documentary format. By infusing real-event storytelling with the ‘dramatic and visual richness of popular genre filmmaking,’ Macdonald’s experimentation can also be viewed a contribution to British cinema and an example of how the sector used unconventional themes in the stories it told (Leggott 2008: 47).

The low-budget sector’s exploration of unconventional themes historically ignored by the mainstream industry was also evident in the multiple-award-winning movies *Bloody Sunday* (2002), *Hunger* (2008) and *This is England* (2006). These films all gained global recognition and audiences with narratives that explore contentious societal issues in recent British history. Greengrass’s *Bloody Sunday* was inspired by Don Mullan’s book *Eyewitness Bloody Sunday* (1997) and tells the story of the Civil Rights Association march in Londonderry on

²⁴² Leggott offers a ‘compelling argument for classifying the work of certain UK-based directors or screenwriters as British, even when links to indigenous culture or geography are tenuous’ by citing *United 93* (Greengrass 2006), *The House of Mirth* (Davies 2000), *Bread and Roses* (Loach 2000), *The Last King of Scotland* (Macdonald 2006) and *Sunshine* (Boyle 2007) in support of this view (2008: 8).

30 January 1972 through the eyes of Ivan Cooper, a man who was a SDLP Member of Parliament and organiser of the march.²⁴³ Although Granada Television broadcast *Bloody Sunday* to a domestic television audience four days after it premiered at the 2002 Sundance Film Festival, a limited European and US theatrical release took place afterwards along with an extended festival campaign.²⁴⁴ The controversial and often-ignored themes of Northern Irish politics also formed the backdrop for *Hunger*, a film that tells the story of the 1981 hunger strikes in the Maze Prison. Winner of >30 awards, including the Caméra d'Or for first-time filmmakers at the 2008 Cannes Film Festival, and with a 90% critics' rating on Rotten Tomatoes, McQueen's debut movie is regarded as a modern cultural contribution to British cinema, with Liam Lacey of *The Globe and Mail*, saying that the movie 'does for modern film what Caravaggio did to Renaissance painting' (2009). Meadows gained a similar level of praise from his award-winning *This is England*, a production that examined skinhead culture in Thatcher-era working-class society. In addition to a 93% Rotten Tomatoes critic rating, a Best British Film BAFTA award in 2007 and a spin-off TV series for Channel 4, the film not only achieved a high level of critical acclaim, but also became an example of how a low-budget film could be used as a tool to counterbalance extremism.²⁴⁵

As noted in the previous section, the low-budget sector also contributed culturally to British cinema by telling stories that explored contemporary issues centred on ethnicity, sexuality, gender and identity. The number of films with distinct BAME and/or LGBT story elements increased considerably during the digital revolution to a level that left the sector as the main contributor to the British motion-picture industry of films with these narratives. For instance, from a number of festival screenings perspective, of the top 100 low-budget movies

²⁴³ One production paradox is that the story is set in Northern Ireland, but much of the filming took place in Ballymun in North Dublin.

²⁴⁴ The film was first screened on 16 January 2002 at Sundance, then shown via UK television on 25 January 2002, then this was followed by a limited distribution in Italy in May 2002 (42 screens) and the United States in October 2002 (45 screens).

²⁴⁵ Lord David Puttnam called the film 'the best example of how British cinema can play an important role in fighting hatred' (2007).

that were made between 2000 and 2012 and that were accepted into a film festival, ~40% contained a major BAME and/or LGBT story theme or character. Moreover, of all the types of festivals that existed during the digital revolution, those that were dedicated to showing only films with significant BAME and/or LGBT content were more likely to screen at least one low-budget film than were any other type of genre-focused festival. Indeed, 52% of all festival screenings and 57% of all awards achieved by the sector were made at dedicated BAME and/or LGBT festivals.

During the years under examination the contribution made by low-budget movies with prominent BAME story elements tended to focus on narratives that explored social realism, poverty, racism and other issues pertinent to those sections of society, such as forced marriage. Multiple-award winning ‘urban’ movies *Bullet Boy* (2004), *Johnny Was* (2006) and *Kidulthood* (2006) are well-known examples of the sector’s contribution in this regard. Along with other urban low-budget movies, they fostered a market for independent British Black Cinema.²⁴⁶ Films such as these, however, were not without criticism in that they were accused of ‘ghettoising’ Black British cinema and pigeonholing it into a genre of social realism (Leggott 2008: 109).²⁴⁷ Many of the films criticised in these ways fall within the low-budget category, but the sector’s thematic contribution to Black British film culture is more varied. For instance, *Elvis Pelvis* (2007) tells the story of a boy named Elvis who worships Jimi Hendrix, but at the same time is tormented by an oppressive father who himself has an obsession with Elvis Presley. Through its study of hero worship and fatherhood the film gained international recognition after being nominated for a Grand Jury Prize at the 2007 Berlin International Film Festival. Likewise, the romantic comedy *Jump*

²⁴⁶ Saul Dibb’s *Bullet Boy* (2004) won three, including a 2004 BIFA, and was accepted into seven festivals. Mark Hammond’s *Johnny Was* (2006) won one, the 2006 Rebellfest Audience Award, and was accepted into 16 festivals. Menhaj Huda’s *Kidulthood* (2006) won two including a 2006 BIFA and was accepted into five festivals.

²⁴⁷ Serita Malik argues that entirely new sub-genres have emerged in filmmaking that represent the BAME communities (2010).

Tomorrow (2001) is equally removed from the harsh social realism that often defines Black British films. Winner of the 2002 Carl Foreman BAFTA award and nominated for the Best British Independent Film at the 2001 BIFAs, this movie tells the story of a Nigerian man who is on the verge of entering into an arranged marriage, but begins to question his situation after meeting a Latin-American woman who herself is also about to be married. The much-celebrated *A Way of Life* (2004) too achieves a marked shift in the focus of Black British urban films, due to its geographic shift from London, the most common setting, to southern Wales, and to its story of racism and complex parent-child relationships.

During the digital revolution, the low-budget sector was also producing a number of award-winning British Asian films. In addition to *The Warrior*, the sector was at the forefront in delivering films that portrayed the British Asian community. Not unexpectedly, many of these have stories that explore racism and complications that arise when cultural traditions clash with the views of a secular society, as they do in *Ghosts* (2006). Other themes are explored through stories involving contemporary issues related to sexuality, the role of women, an increasingly confident Asian-LGBT community, the effects of drugs and crime on society, war and, most notably of all, the modern identity of the British Asian. Therefore, while films such as *Yasmin* (2003), *Chicken Tikka Masala* (2004) and *Mischief Night* (2006) all deal with cultural integration and racial tensions, they also have themes pertinent to all parts of society. For instance, *Yasmin* (2003) not only portrays a racist setting in post-9/11 Yorkshire but does so from a woman's viewpoint, seldom presented in films that prominently depict British Asians. Racism is also given attention in *Second Generation* (2002), and like *Yasmin* its focus is on a woman who struggles for independence in a patriarchal society. The romantic comedy *Chicken Tikka Masala* explores the emotional struggles that LGBT Asians often face when declaring their sexuality, telling the story of a

young, gay, Lancastrian-Indian doctor who is forced by his conservative parents to undertake an arranged marriage to a woman. Humour is also used in *Mischief Night* (2006) to portray racial and cultural conflict, but in this narrative the environment is used to focus on social deprivation. The use of the comedy to present society-wide themes is also evident in *Nina's Heavenly Delights* (2006), *The Infidel* (2010), *West is West* (2010), *Room to Rent* (2000), *Halal Harry* (2006) and *Don't Stop Dreaming* (2007).

The comedy genre was not the only one explored by low-budget British Asian films during the digital revolution. More serious films also explored subject matter such as drug addiction, as in the 2004 Cannes Film Festival winner *Clean* (2004), and the impact of crime on the innocent, as in *Soi Cowboy* (2008) and in *Butterfly Man* (2002). A very prominent and topical subject during this time involved the consequences of the American-led 'war on terror' and the invasions of Iraq and Afghanistan. This theme is explored in his award-winning *Ahlaam* (2006), a story set in a Bagdad mental asylum, and in the acclaimed film *Infinite Justice* (2006), which tells the story of an American reporter held hostage in Pakistan so that he can be exchanged for prisoners held in Guantanamo Bay. Another film portraying the consequences of war was *In This World* (2002), a film that won the 2003 Golden Bear at the Berlinale and depicted two Afghan refugees who make a dangerous journey from their refugee camp in Pakistan to find a new life in London. Low-budget British Asian movies also had other themes related to war; the Sri Lankan civil war is the backdrop in *In the Name of Buddha* (2002), while in *Trouble Sleeping* (2008), the Israeli-Palestinian conflict takes centre stage in the story of a Palestinian refugee who is forced to return to the Middle East.

Given the distribution and exhibition dominance of Hollywood studio-based movies and the mass audience focus of the narratives they usually portrayed during the digital revolution,

the sector became the main outlet for producers who wished to tell LGBT-themed narratives. This situation resulted in the low-budget film sector becoming a major contributor to British Queer Cinema. As previously shown, the number of productions with prominent LGBT content did rise in actual numbers during this time, but at this point it is more interesting to note the quality of these films. One of the most obvious examples of the sector's contribution to British Queer Cinema is the 2011 feature-film *Weekend*. Following on the successful debut of the LGBT-themed *Greek Pete* (2009), itself an award winner about the life of a London rent boy, the story in *Weekend* is of two men who have a one-night stand but end up making a stronger commitment to each other. The movie received universal acclaim, garnering 45 festival appearances, 13 award nominations and 17 awards including a 2011 BIFA, a win at the 2012 IFFR and many other awards at festivals such as the Paris Lesbian Film Festival, the San Francisco International Lesbian & Gay Film Festival and the L.A. Outfest. It also boasts a 95% user rating and an 86% critics rating on Rotten Tomatoes. The data also indicate that the film was probably a financial success; it was only made for only £120,000 and its US theatrical box office revenue was five times higher than that amount (it was not released in the UK). The sector's cultural contribution to British Queer Cinema can also be observed in its award-winning films that gained over 20 individual festival screenings. These include *Gypo* (2005), *Break My Fall* (2011), *Wild Side* (2004), *Tick Tock Lullaby* (2005) and *I Can't Think Straight* (2008). They comprise a unique group out of the ~70 LGBT-themed films that made a contribution to British cinema during this time.²⁴⁸

The low-budget sector was also fertile territory for producing movies with strong working-class male-centred subject matter. The work of English auteurs Shane Meadows and Nick

²⁴⁸ Other low-budget films with prominent LGBT themes were made, but do not appear in this list because they did not attend over 20 film festivals (the threshold used in this measurement). Movies that added to the canon of British Queer Cinema and fall into this category include Pawlikowski's *My Summer of Love* (2004), Mo's *9 Dead Gay Guys* (2002) and Gornick's *Do I Love You?* (2002).

Love epitomises this contribution. Meadows and Love both began their careers within the sector and both continue to make British movies for ≤£2.5m. Films like *Once Upon a Time in the Midlands* (2002), *Dead Man's Shoes* (2004), *This is England* (2006), *Somers Town* (2008) and *Le Donk & Scor-zay-zee* (2009) by Meadows all offer some insight into modern Britain from a contemporary working-class male perspective.²⁴⁹ A substantial portrayal of the experiences and struggles of the English male can also be found in Nick Love's *Goodbye Charlie Bright* (2001), *The Football Factory* (2004), *The Business* (2005), *Outlaw* (2007) and *The Firm* (2009). These films often portray a harsh working-class world in which men have to overcome issues linked to poverty, crime, sexual relationships and the class prejudices of a middle class that is usually oblivious to the suffering of the working-class. The movies produced by Meadows and Love, along with other award-winning films, such as *Bronson* (2008), *16 Years of Alcohol* (2003), *Saxon* (2007), *Sweet Sixteen* (2002) and *Kill List* (2011), suggest that the sector made a significant contribution in this genre by giving it a unique perspective on the aspirations and struggles of the working-class man that would not otherwise have been told by the wider industry.²⁵⁰

Male-centric narratives, however, were not the sole preserve of male directors in the low-budget film sector. Coinciding with a rising number of female directors mentioned before, more films with women-centric themes were also produced that made a contribution to British cinema. Andrea Arnold's UKFC/BFI-supported features *Red Road* (2006) and *Fish Tank* (2009) are two typical examples of female-centric stories that were conceived, directed and produced by this group of women filmmakers. After lengthy festival campaigns, both of these movies obtained accolades from reputable organisations and have been used to

²⁴⁹ These Meadows films garnered 57 festival appearances, 15 nominations and 32 awards, including a 2008 BAFTA Award for Best British Film for *This is England* (2006).

²⁵⁰ Love was originally going to direct *Bronson* (Refn 2008), but instead took an executive producer credit and directed *The Firm* (2009).

support the claim that Arnold inspired a rise in the number of female UK directors.²⁵¹ The rise in low-budget films directed by women can be found in films, like *Frozen* (2004), *Yes* (2004), *The Calling* (2009) and *Unrelated* (2007) since they all have female-centric stories and were directed by women. While most of these portrayals were of heterosexual women and relationships, there were also lesbian-centric films made by women that were told from a viewpoint that had seldom before been expressed in British cinema. The award-winning LGBT-themed women-centric films *The World Unseen* (2007) and *I Can't Think Straight* (2008), and the acclaimed *Tick Tock Lullaby* (2005) and *Do I Love You* (2002), are all examples of such films and all have helped define the British Lesbian Romance sub-genre since they were pioneers in exploring this topic. Women filmmakers, such as Lone Scherfig, Penny Woolcock, Alison Peebles, Debbie Isitt, Eleanor Yule, Gaby Dellal and Sarah Gavron, also explored more gender-neutral themes. Their active participation in an industry historically dominated by men was in itself a contribution to British cinema. That being said, women-centric narratives have also been used by male directors, as in *London to Brighton* (2006), *The Mother* (2003), *My Summer of Love* (2004) and *Last Resort* (2000).

The low-budget sector's contribution to British cinema is also partially defined by its output in genre storytelling. Earlier it was shown that this branch of filmmaking expanded the field of genres it used, but it is the horror genre that is most often associated with low-budget films and it is from this perspective that the sector made some particularly notable contributions. This study identified 187 productions that were described by their producers primarily as horror films, comprising 11% of annual production on average. Of these 187 horror films, 102 were able to achieve at least one festival premiere—54%, the highest of

²⁵¹ Arnold won the 2013 Screen International Star of Tomorrow and was appointed Officer of the Order of the British Empire (OBE) in the 2011 New Year Honours list for services to the British film industry.

any genre category. Many of the festival-screened horror films include lesser-known works such as *Inbred* (2011), the action-horror films *Colin* (2008), *The Dead Outside* (2008), *Outcast* (2010) and *The Living and the Dead* (2006). However, included in this group are also much more widely distributed and award-winning cult films such as *My Little Eye* (2002), *Evil Aliens* (2005), *The Children* (2008) and *The Bunker* (2000). In fact, a number of now-acclaimed British directors began or advanced their careers by making low-budget horror films during the digital revolution. These directors included Neil Marshall, who made *Dog Soldiers* (2002); Paul Andrew Williams, with his second film *The Cottage* (2008); and the award-winning horror auteur, Julian Richards. Richards is particularly interesting since he was the most prolific horror filmmaker in the low-budget sector during the period with his three films *Silent Cry* (2002), *The Last Horror Movie* (2003) and *Summer Scars* (2007); together, those films were accepted into over fifty festivals around the world, obtained 17 awards, including a BAFTA, and all achieved a commercial distribution.

However, the most commercially successful British low-budget horror/sci-fi film during the digital revolution was Gareth Edwards's *Monsters* (2010), which tells the story of a cynical journalist who agrees to escort a shaken tourist through an alien-infected zone in Mexico. Made for £312,500, this film had a worldwide theatrical release that achieved £2,651,861 in box office revenue.²⁵² Before this distribution the film had appeared at 18 festivals, received seven nominations and won seven awards from a number of well-known organisations. Amongst those honours was the Best International Film award at the Academy of Science Fiction, Fantasy and Horror, three BIFA awards and a nomination for a BAFTA award. This movie received 38,649 IMDb user ratings and a rating average of 6.4, with Rotten Tomatoes ratings of 72% from critics and 52% from users. Yet the strength of its financials and the

²⁵² IMDb lists the budget at US\$800,000 from a total production standpoint.

prestige of its accolades are not the only reasons why this movie deserves special attention; also of interest is that the director believed the film could not have been made without affordable ‘prosumer’ image-capture and processing technology within all HD digital workflows (Edwards 2010). This is because *Monsters* was shot and edited by two people, with cameras and lenses costing \$13,000 and had over 250 special effects, generated on a personal computer with Adobe Creative Software. As such, the movie remains a textbook example of the power the digital revolution gave to low-budget filmmakers (Kohn 2010).

Finally, the low-budget film sector also made an important linguistic contribution to British cinema during the digital revolution, by providing the nation with some of its candidates at the Academy Awards for the Best Foreign Language Oscar. These included three Welsh-language films: the UK’s sixth candidate for the 75th Academy Awards, *Do Not Go Gentle* (aka *Oed Yr Addewid*) (2001); the nation’s eighth candidate for the 81st Academy Awards, *Hope Eternal* (2008); and the tenth British candidate for the 84th Academy Awards, *Patagonia* (2010). This contribution could have been numerically higher and more representative of all the indigenous languages that are spoken in the nation if it had not been for a controversial decision made in 2007 by the BAFTA film committee.²⁵³ In that year the group decided not to submit a candidate for Best Foreign Language Film at the 2008 Academy Awards, despite two low-budget movies being put forward by their respective producers; the Scottish Gaelic-language film *Seachd: The Inaccessible Pinnacle* (2007) and the Welsh-language film *Calon Gaeth* (aka *Small Country*) (2007) were both proposed by their producers as the UK’s ninth candidate for the 80th Academy Awards, but the BAFTA film selection committee decided not to submit any candidate for that year, insisting that

²⁵³Cornish (Kernewek), Irish or Irish Gaelic (Gaeilge), Scots or Ulster Scots, Scottish Gaelic (Gàidhlig), Welsh (Cymraeg) and Cornish are all classified as ‘indigenous languages’ by the British government under the European Charter of Regional or Minority Languages.

there were no ‘outstanding films’ available (BBC 2007). This controversial decision gained coverage in the press at the time and was the reason why the film’s producer, Christopher Young, decided to resign his BAFTA membership in protest (ibid.). The Scottish Parliament even pressured BAFTA to reconsider its decision, but in the end, it was not reversed. The dominance of Welsh-language films selected as candidates for the Academy Award for Best Foreign Language Film notwithstanding, the low-budget sector is also the only section of the British film industry ever to have made a Cornish-language movie; the film *Bitter Sweet (Hwerow Hweg)* (2002) remains the only Cornish-language film to have been produced, an accomplishment that is in itself a contribution to the heritage of British film.²⁵⁴

7.3 Conclusions

This chapter presented certain economic and cultural statistics that, when viewed together, offer an evaluative perspective on the contribution made by the low-budget sector during the digital revolution. In the economic section of this study a customised Measurable Economic Activity approach was used to derive an estimate of total economic activity contributed by the sector of ~£613m. This was based on a ~£554m estimate for costs and a ~£59m estimate for national box office revenue. This contribution was described as modest when compared with comparable industry totals, since the sector’s contribution of ~£613m was ~2.3% of the UK movie industry’s £26.2b MEA estimate, its share of UK manufacturing expenditure was ~3.6% (~£554m/£15.3b) and its share of UK box office receipts was ~0.5% (~£59m/£10.8b).

Given Hollywood hegemony and the distribution trends discussed in the last chapter, these findings were not surprising, but what was more revealing was the sector’s position in

²⁵⁴In fact, *Bitter Sweet (Hwerow Hweg)* (2002) was made for ~£250k and was shot in both Cornish and English. The film was first shown in the House of Commons in March 2002 as part of a campaign to have the Cornish language officially recognised (BBC 2002).

comparison to all other independent British-made and financed movies. When compared to the UK's independent filmmaking sector (at all budget levels), a part of the market that is essential to establishing a more sustainable British film industry, it was found that the low-budget sector's ~£554m production expenditure was responsible for ~22% of the cost of all independent movies, and its ~£59m UK box office revenue was responsible for ~7% of all British independent films' UK box office revenue. The ~22% share of the manufacturing expenditure is notable because it includes a large number of privately-funded movies made for \leq £500k, and suggests that roughly a quarter of all independent domestic production occurred in the sector. The ~7% share of box office revenue for UK independent production is also noteworthy because it too suggests that the low-budget sector was responsible for a substantial fraction of the economic contribution of all locally-made independent productions to the UK box office revenue—a fraction similar to that amount achieved by films from Asia and Latin America combined.

The two components of the MEA estimate were also used to calculate a ~10% revenue-to-cost ratio. This estimate was limited in that it considered revenue from domestic theatrical exhibition only (and not from other forms of exhibition or from advertisement revenue), and considered costs from manufacturing only (not distribution costs), and could therefore not be viewed as a measure of profit. However, it did provide another opportunity to compare the sector to the rest of the movie industry. The industry as a whole, including studio-backed UK productions, achieved a ~70% revenue-to-cost ratio, while a ~31% ratio was achieved by independent British-made movies at all budget levels. While the sector's ~10% revenue-to-cost ratio was lower than the ~70% ratio achieved by the entire industry and the ~31% ratio achieved by the independent UK-made films, it was further indicative of the distribution trends noted in the last chapter, in that it shows how traditional sources of

revenue could not have been a major source of reinvestment fuelling the growth in production. Nevertheless, the MEA analysis did confirm that the sector did make an economic contribution to the British movie industry of ~£613m, and that this contribution was a major component of domestic independent production. This contribution did not receive a high level of investment from the public sector, nor was it based on a rise in production of likely-bonded films; it was based instead on a rise in likely-non-bonded films, and on a growth in private sector investment.

The later section of this chapter presented analysis indicating that the low-budget sector also made a measurable cultural contribution to British cinema during the digital revolution. The evidence for this was based on four assessments: film festival participation, audience reach achievements; narrative portfolio additions to British cinema; and the contributions of new moviemaking talent. These assessments were prefaced by a review of the global rise that occurred in the number of film festivals and of how this offered low-budget producers more opportunities to screen their films to paying audiences and, ultimately, to make a greater impact on society. To support this conclusion, data were provided that showed that the number of festivals that screened at least one low-budget film rose five-fold over an eight-year period, from 108 in 2000 to 534 in 2008. They also showed that this expansion led to 3,676 individual screenings of low-budget films in more than 50 nations. By any measure this was a substantial representation of British cinema, but the extent of this achievement is better understood when noting that 3,676 screenings equated to 76% of all the festival screenings of all British-made films in the ~36k festivals held over the twelve-year period. Though only a minority of the 1,451 productions surveyed gained entry into a festival, with some of those attending numerous festivals, the data indicate that those screenings brought

more UK low-budget films to a global audience and more chances to be judged alongside more costly movies from around the world.

The specific cultural benefit of the films that attended festivals was the first area of focus in this section. However, in this case, the analysis was based on the accolades gained, since such awards were usually selected by an independent jury, according to artistic merit. This method was based on the assumption that the more awards a movie received, the more likely it is to have made an impression on audiences and, as a result, the greater its cultural impact. This assessment found that 1,072 nominations and 910 awards were garnered by UK low-budget features during the digital revolution, a finding that offers evidence that a measurable level of cultural contribution was made by the sector; these totals equate to 57% of all nominations and 64% of all awards gained by the entire British film industry.²⁵⁵ On a more detailed level, the data also indicated that a small sub-group of these films attained an even higher level of societal interaction by attending some of the most prestigious festivals in the world. This is because low-budget films gained premieres at film festivals such as the TIFF (67 films), the Berlinale (40 films), Cannes (30 films) and Sundance (28 films); and this not only gave them more prestige by association with the festivals involved, but also led to this group gaining a higher than average distribution rate and a higher level of audience reach.

The next type of cultural contribution examined was audience reach. This analysis was based on the premise that a movie's cultural impact on society can be measured by the interaction it generates on online. The data used to measure this interaction was made up of public rating and review totals posted online on the IMDb and Rotten Tomatoes websites, which together revealed a number of interesting observations. The most obvious finding

²⁵⁵ Based on IMDb online data as of 30/01/17.

was that the 1,451 low-budget movies received 1,221,232 IMDb ratings by the end of 2014. Admittedly, this was a modest total compared to those gained by studio-backed films such as *Casino Royale* (Campbell 2006) with its 428,043 ratings and *The King's Speech* (Hooper 2010) with its 431,329 ratings. Nevertheless, regardless of its relative position on an industry-wide level, it is undeniable that 1.2m ratings do signify a cultural contribution. In fact, the low-budget sector is responsible for a significant fraction of the contribution of all other British independent films, having garnered 40% of all ratings received, which compares favourably with its ~22% share of independent production expenditure and its ~7% share of independent UK box office receipts. The sector's 1.2m IMDb ratings also seem to corroborate the higher distribution rates achieved by films that attended top festivals. This is because when the data were sorted by festival appearances, they indicated that productions that attended one of the top festivals had over four times the number of 'raters' than their contemporaries that attended other festivals only, and that productions shown at other festivals had almost twice the average number of raters than those not shown at any festival. Therefore, for the producer who wanted to have a production seen by as many people as possible, festival attendance—particularly at a top festival that offered quality publicity, greater opportunities to meet distributors and attain a higher audience level—was an essential undertaking that was needed to counter limited marketing budgets.

The extent of audience reach was also considered from other perspectives. For instance, the data did not indicate any causal relationship between audience reach levels and the increase in self-distribution, online legal: fee and online legal: free exhibition. This finding was not expected since it would seem reasonable to conclude there would have been a growth in audience size with a rise in use of new online-based exhibition channels. While it is true that the data did confirm a small rise in the total number between 2000 and 2012, this

increase has to be viewed in light of the fact that only 22 films gained over 10,000 of the ratings over the course of the digital revolution, and that the annual rating totals fluctuated considerably as a result. These 22 productions were not only disproportionately influential on the sector's average of 787 ratings per film, because of their own success in gaining a higher level of audience reach, but also because 31% of low-budget films never attained a single IMDb user rating. Furthermore, 21 of those 22 shared one trait: they were all theatrically released before being distributed on other platforms. This suggests that theatrical exhibition, not online self-distribution, was a likely factor in the audience reach gained. However, another probable reason that this elite group was able to gain higher than average audiences is because they were better quality than most movies. The evidence for this possibility is based on the finding that the 22 films that had over 10,000 ratings possessed an average IMDb rating score higher than the sector's average, by 2.3 points, but it should be noted that the average IMDb user rating for the sector was 5.5, which was close to the 5.8 averages for the industry as a whole.

The thematic diversity of the films themselves was another category of cultural contribution that was measured. The empirical evidence presented indicated that the sector had broadened its narrative repertoire with genres, subgenres and BBFC ratings seldom used before the digital revolution. A key finding included the rising number of films in genres not historically associated with low-budget production, in particular, sci-fi and western films. The chapter also highlighted a rise in the use of sub-genre categories, especially those with BAME and LGBT themes, and a more consistent use of the BBFC 15 rating. As such, statistically at least, these trends indicate the sector had become more aligned with the national industry by tackling a greater variety of genres. The data suggested that the low-budget sector's narrative portfolio had become even more complex, for two reasons. Firstly,

it was caused by a rise in the number of films that illustrated themes on ethnicity, sexuality, gender and identity that had been less common before 2000; secondly, the sector's complexity may be underestimated by such films' increasingly being categorised under main genre terms instead of by more descriptive subgenre terminology. An example is that before 2000, romance films that had LGBT characters in the main roles were typically categorised on FFE and on IMDb under a subgenre, hybrid or niche term such as a 'gay romance,' but by 2012 the use of such terminology had been largely replaced by the main genre term, 'romance'. Hence, the genre data held on such databases became more generic, and obscured a broadening in the narrative diversity of the low-budget sector.

While the psychological and sociological reasons low-budget producers had for generalising the way they promoted some of their films were not explored in this thesis, the data did show that, in addition to the arthouse, genre and working-class male-oriented films that the low-budget sector has always made, producers increased the numbers of films they made that had main characters and/or key incidents that centred on female, BAME and LGBT themes, and of films that were scripted in an indigenous language. The low-budget sector therefore did make a production contribution to British cinema in this regard but, because the idea of cultural contribution specifically implies artistic success, a survey was conducted of some of the sector's most award-winning films. This qualitative review led to some conclusions on what can only be collectively defined as an eclectic group of movies. One of the most obvious findings was that many artistically influential films provided some evidence for the view that satisfactory quality levels were achieved for modest budgets. The evidence also suggested these same films had artistic value in the way they portrayed new themes. For example, some of the most celebrated films challenged many of the public's views as to what defines a quintessential British movie. This expansion gave a public undergoing

profound social change a greater selection of films to choose from and, in so doing, gave niche artists more of a voice than they had before. This was particularly true for women and those from the BAME and regional sections of society. Audiences that had long been ignored by the studios were now being offered stories more in line with their experiences and tastes, and this was accompanied by a large amount of experimentation and risk taking, leading to the exploration of ideas and expressions of identity on a world scale.

The final perspective on cultural contribution reviewed related to the success the sector had in providing an environment that led to rises in participation levels from under-represented areas of society. The evidence of geographical diversity was already provided in Chapter Five, but the evidence demonstrated in this chapter also indicated that BAME and women directors also increased markedly in number, and in so doing helped fuel the cultural contribution of the stories they portrayed. Indeed, the sector was so successful in this transformation that, when grouped together, in 2012 BAME directors helmed 19% and women 28% of the films produced that year. A number of examples were then provided that suggested this change led to talented BAME and women directors using their low-budget films as initial stepping-stones that would later lead to other, higher-budget contributions.

8. CONCLUSIONS

Over the course of this thesis a wide range of evidence-based findings have been presented on an area of the British film industry that has seldom been investigated: the low-budget film sector. This chapter reviews the main findings of this study so as to present an assessment of the sector during what has been referred to as the digital revolution. The findings will be reviewed from the aspect of their relevance to the research questions, rather than in their order of appearance in the chapters. These findings will then be examined using a SWOT matrix to elucidate their possible applications to film-management practice and public sector policy. The chapter will then consider the degree to which this thesis achieved its main aim; offer recommendations for further research; and conclude with some closing comments.

This thesis began by noting that the low-budget film sector, despite notable successes, has not been systematically researched in terms of its economic functioning and its total cultural contribution to the British movie industry. This gap in the literature presented an opportunity to contribute to the ongoing strategic discourse on how to create a more sustainable domestic industry; in particular, it offered an opportunity to examine the role, suggested by empirical data, that the arrival of an all-digital low-budget supply chain process could play in enabling the achievement of this goal. This opportunity also instructed the main research question: ‘What was the state of the low-budget sector during the digital revolution, and how did new technology affect its operations and overall contribution?’ In so doing, the study also asked subsidiary questions inquiring into a growth-from-innovation hypothesis and possible new relevance for budget realignment strategies published in the 1990s with the intent to increase cultural representation and economic sustainability. These subsidiary research questions are: ‘What changes occurred in the size of the sector?’; ‘How did new technology affect the low-budget filmmaking process?’; ‘What were the sector’s economic and cultural contributions

to the overall domestic movie industry?'; and 'What are the main research findings, and what do they suggest should be considered in public sector policies intended to establish a more sustainable and culturally representative British motion-picture industry?' (Chapter One).

The introduction also discussed industry peculiarities that must be considered in any analysis on the sector: the preponderance of what Wasiko describes as 'unique characteristics that defy typical economic analysis' (2003: 2). This survey was then followed by a review of the research conceptualisation process, including a review of the reasons for using a customised supply chain framework, a census approach and certain perspectives and methods (Chapter Two). This review of the research design process also included the results from a PESTEL survey, concluding that there was no evidence that the decisions of low-budget producers had been significantly affected by any non-technology-related PESTEL factors. This lack of feasible alternative explanations for the sector's production growth between 2000 and 2012 lends indirect support for a growth-from-innovation hypothesis: that the increase was fuelled by the arrival and use of digital technology and that the decisions of low-budget producers were greatly influenced by this situation (Chapter Two).

8.1 Main findings

The first subsidiary question asked in this study was: 'What changes occurred in the size of the sector?' In an effort to answer this question two research assessments were undertaken: a census of all the low-budget feature-length films made from 2000 to 2012, and a new set of annual production estimates for both the sector and the entire domestic industry (Chapter Three). These assessments led to the most comprehensive quantitative study of low-budget movies yet conducted, and ultimately revealed that manufacturing levels had been far higher than previously reported. The main finding in this instance was that from 2000 to 2012 the

sector made 1,552 films, with output rising by 233% over the period, from 60 films in 2000 to 200 films in 2012*; in absolute terms, this rise was unequalled in the history of the British movie industry. It was also found: that most of this rise was fuelled by films made for \leq £500k and that the sector's average production rate was consistent and high, at ~11% per year, a comparison that reinforced the heuristic view that the lower the cost of production, the higher the volume and the more stable the growth; and that non-technology related PESTEL factors might have marginally affected the annual number of films made for $>$ £500k. These findings indicated that the low-budget sector was not only the largest production sector in the British movie industry, but was also larger than the rest of the industry combined (Chapter Three).

The second subsidiary question asked was: 'How did new technology advancements affect the low-budget filmmaking process?' To answer this question, three different assessments were undertaken. These were: a comprehensive review of the most significant advancements that took place during the period; a study of the image-capture technologies used; and an identification of other changes that occurred in the sector's supply chain. These provided insight both into the types of innovations that occurred, and into the changes that followed in the decisions made by producers in each sub-process, thus proving the extent of empirical views made by practitioner-authors that the supply chain had fundamentally altered in favour of low-budget filmmaking.

The assessments on the scale of technological change found evidence that most tools used in the supply chain process experienced rapid and frequent 'Moore'sque innovations' that are characterised by an improving price-quality ratio (Chapter Four). In particular, they provided evidence that tool manufacturers were introducing new cameras every fourteen months; that by the early 2000s many of these cameras had the functionality needed to meet the standards

needed for theatrical distribution; and that these were priced at levels no longer prohibitive (Chapter Four). Further trend analysis confirmed these findings by indicating two product traits suited to productions with small crews: a rapid fall in price-quality ratios and greater miniaturisation in the size of cameras. Similar trends were also found in the technological evolution of certain software used for planning, editing and special effects. This fall in price-quality ratios was achieved by the continuation of relatively stable and affordable prices, accompanied by a rise in image-processing abilities (Chapter Four). The Mooresque nature of these technological developments, based largely on the arrival of data file standardisation, suggested all moviemaking software underwent similar types of advancements, making possible a more interconnected and efficient supply chain.

These findings corroborated the claims made by practitioner-authors, which asserted that low-budget producers had, for the first time, gained the ability to make cinema-quality films for a relatively small cost (Chapter One). However, a more favourable PESTEL environment for production that these trends portray does not in itself show that producers took advantage of this situation. The demonstration that they did exploit the more favourable manufacturing environment was shown with another study, one which found that the percentage of movies made with a digital camera rose from 11% to 90% from 2000 to 2012 (Chapter Four). This finding is informative since it not only confirms for the first time the speed and magnitude of the sector's abandonment of analogue-based technologies, but is also consistent with other findings suggesting that every sub-process was altered during this period (Chapter Six).

These other findings can be summarised by first noting the extent to which film producers' decisions were affected in the planning and sourcing of their investors, filming locations and personnel. The evidence in this case was based on trend analysis that showed: a percentage

rise in private funding as capital from the UKFC/BFI, N/RSAs, PSBs, co-producers and art agencies remained at consistently low levels in absolute terms, but fell in percentage terms; a marked rise in regional filmmaking and in the diversity of types of stories told; and a rise in the number and location of skills that followed an expansion in regional training (Chapter Five). Changes were found in the manufacturing and delivery sub-processes, in particular: a decrease in the average duration of the supply chain; a fall in the APC; a rise in legal online distribution (paid and free) as traditional exhibition decreased; a fall in online illegal films; a fall in the use of agents and distributors along with a rise in self-distribution; and a rise in online legal: free films at a rate projected to surpass online legal: fee films (Chapter Six).

Altogether these findings offer new insights into the pace and extent with which producers' adoption of the digital file as their preferred image-capture-and-processing medium in their script-to-screen processes (Chapter Four), as well as into the coinciding expansion in output (Chapter Three). Adding to the PESTEL review's ruling out of other factors as explaining the growth in output during the period, these findings present positive correlational evidence for a growth-from-innovation hypothesis (Chapter Two). The evidence that supports this hypothesis was not based solely on the temporal overlap of these trends, but also on how the capabilities of new tools enabled more efficient and effective supply chains (Chapter Four). Although consideration of a hypothetical supply chain did not prove that all-digital supply chains were less complex or risky than their all-analogue predecessors (Chapter Two), it did indicate certain labour-intensive and expensive tasks needed in analogue era manufacturing processes could be avoided, combined or streamlined (Chapter Four). This opportunity was clearly exploited since the data for 2010 indicates 90% of the films were made with digital cameras and both the APC and duration of the supply chain had dramatically fallen, factors that enabled lower MPCs and more ways to satisfy *ars gratia artis* ambitions (Chapter Four).

The constantly improving price-quality ratio for filmmaking tools, which offered producers more ‘bang for buck’ via lower MPCs, also had two other consequences that fuelled output. First, Mooresque developments allowed industry stakeholders to build new training facilities (physical and online) at lower cost and in every region (Chapter Five). This meant producers were no longer restricted to sourcing their crew and services from within the GLA since the skills base had become more evenly distributed around the nation. Second, the improving price-quality ratio lessened the need to obtain investment finance from London-based public sector agencies and/or PSBs since higher levels of private equity could be secured locally, especially by self-financing. Thus, not only did low-budget producers gain, for the first time, the same ability as a studio executive to make a feature-length film with the standards needed for commercial distribution (Chapter Four), but they also obtained greater control over the supply chain, a situation that led to more regional stories being told (Chapters Five and Six).

The simultaneous rise in accessibility of the supply chain process and increase in output also indicated that some of the longstanding barriers to entry noted earlier by McIntyre, Ilott and Relph during the analogue era were no longer as prohibitive during the digital revolution. As just noted, production was no longer inhibited to the same degree by a limited access to either capital or requisite skills (Chapter One). Moreover, peculiarities of the sector that once acted as inhibitors to production, especially the lack of opportunities to gain economies of scale, lack of power relationships, limited presale opportunities and historically high MPC values, also lessened, as evidenced by the high production rate (Chapter Three). In addition to the lowering of barriers to entry, the rise in output is also notable for occurring in spite of a lack of demand by distributors and confirms the long-held concerns of the perpetual gap between producers and distributors expressed by McIntyre, Petrie and Relph (Chapter Six).

While low-budget producers increasingly gained the ability to plan, source and manufacture their productions wherever and whenever they wanted, it was not evident they were more commercially successful in the delivery sub-process, since the traditional distribution level remained consistently low in absolute terms and dramatically decreased in percentage terms (Chapter Six). The most plausible reason why many movies failed to gain theatrical releases is that they were not of sufficient 'quality' to be competitive in the market; a factor that was not investigated in this thesis. What was found was that the theatrical market had become more competitive during the period, based on a growing number of new releases each year that likely saturated the market. Producers often had no other choice but to self-distribute their films online (both fee and free) to gain more control over the delivery sub-process, an assertion that is consistent with other findings that showed: a rapid decrease in the overall duration of the supply chain; fewer agents being employed; and that there was an absolute reduction in online illegal films (Chapter Six).

While these trends may seem to have been a positive development for the movie producers involved, it is not certain that the 90% distribution rate achieved in 2010 signalled an equally great increase in financial return for the sector. This is because the rise in the distribution rate and the shortening of the supply chain's duration was primarily based on a rise in online legal: free downloads (Chapter Six). In fact, though the increased use of the legal: free format ensured that British audiences had, for the first time, access to most of the sector's films, it cannot be assumed that more people were watching these films or that online distribution had become a panacea for new IPRs revenue creation. This is because no evidence was found that the rise in online legal: free exhibition was accompanied by any new internet-based

revenue generating business models (Chapter Six).²⁵⁶ Hence, it could be argued that the rise in legal: free downloads became more of a threat to the national goal of a more economically sustainable industry than illegal downloads had been, since the values of IPRs for movies legally free to download were willingly set to zero by the producers concerned.²⁵⁷ As Vogel makes clear, financial sustainability can only be derived from a sufficient level of revenue from the exploitation of IPRs; it is here that box-office performance becomes pivotal since it has historically not only been a means for producers to gain an income, but has also been an important promotional tool in deriving incremental revenue from other rights (2007: 106).

The third subsidiary question asked in Chapter One was: ‘What were the sector’s economic and cultural contributions to the overall UK film industry?’ To answer this, two assessments were undertaken: a quantitative study of the sector’s economic activity and a quantitative set of assessments of the sector’s cultural achievements. In terms of economic contribution, the aggregate data indicated the sector was ~2.3% of the entire domestic industry’s MEA output (~£613m/£26.2b) based on a ~3.6% (~£554m/£15.3b) share of manufacturing expenditure and a ~0.5% (~£59m/£10.8b) share of box office receipts (Chapter Seven). This contribution was deemed small relative the overall industry, but more informative when compared with only independent production. This is because the low-budget sector comprised ~22% of the manufacturing expenditure and ~7% of the box office takings of all independent movies (any budget) (Chapter Seven); an achievement that was not achieved by an increase in public sector investment, but from a rise in unbonded films (Chapters Five and Six). Therefore, the

²⁵⁶ For instance, of all the movies that were found to be distributed via online legal: free downloads, only ~3% of them were found to have advertising placements or sold merchandise (hats, shirts, signed DVD sets).

²⁵⁷ A counter argument could be made that ‘free movies for everyone’ is a model more in keeping with the *ars gratia artis* aims of some producers and a worthy response to ‘ruthless Hollywood capitalism’, but no data was found that such a strategy could be economically self-sustaining in the long term.

sector's ~£613m MEA contribution was not only significant in sustaining independent film production, but also that it was largely achieved by private investment.

The cultural contribution of the sector was considered from four perspectives (film festivals, audience, diversity in narratives and talent, notable productions), the first being film festival participation. Over the 2000–2012 period, the number of film festivals around the world increased fivefold and British low-budget films made during the period were shown in 3,676 individual screenings in fifty nations (Chapter Seven). These 3,676 screenings accounted for ~76% of all the festival screenings by British-made movies in the ~36,000 festivals held over the twelve-year period, thus the sector achieved more festival screening opportunities than all other British films combined (Chapter Seven). Of these 3,676 screenings, UK low-budget films garnered 1,072 nominations and 910 awards, a result that equated to 57% of all nominations and 64% of all awards gained by the British motion-picture industry. This evidence, therefore, suggests the sector made a large cultural contribution when measured by festival exposure. The data also indicated that a small sub-group of films attained a higher level of societal interaction by attending some of the most prestigious festivals since such movies gained premieres at festivals like Cannes and Sundance; and this not only gave such movies more prestige by association with those festivals, but also led to them gaining higher than average distribution and audience reach rates (Chapter Seven).

The second measurement used to assess the cultural contribution of the sector was based on the level of audience reach that was achieved. The 1,451 low-budget movies surveyed were found to have 1,221,232 IMDb ratings at the end of 2014 (Chapter Seven). This number was modest in comparison with studio-backed films, but was proportionally higher when considering it equated to ~40% of all ratings received by all British independent movies, a

ratio that compares favourably with the sector's ~22% share of manufacturing expenditure and ~7% share of UK box-office receipts of those same movies (Chapter Seven). However, it is likely that one reason the ~40% share is higher is because of the greater number of low-budget films made during the period. It is therefore reasonable to conclude that as more films were seen in more festivals and online, the total number of IMDb ratings increased in tandem with this expansion rather than from an increase in the number of viewers per movie.

The sector's 1.2m IMDb ratings also corroborate the higher distribution rates achieved by films that attended a top film festival. When the data were sorted by festival appearances, they indicated that movies that attended one of these festivals had over four times the number of ratings than did films that attended other festivals only, and that movies shown at other festivals had almost twice the average number of ratings than did those not shown at any festival (Chapter Seven). However, no causal link between audience reach and the rise in self-distribution (online legal: fee and free exhibition) was found. This result was surprising, since it might have been expected to find a rise in audience levels with an increase in online-based exhibition; nevertheless, this finding was still indicative of the lack of evidence that more people per film were watching low-budget films. Further analysis indicated: that only 22 films had >10k ratings; that the annual rating totals fluctuated substantially; and that 31% of films never attained a single IMDb user rating. It was also found that 21 of the 22 films with >10k ratings had one common trait: they were all theatrically released before being distributed on other platforms. This finding therefore suggested that cinema exhibition, not online exhibition, was a more influential factor in the audience achieved (Chapter Seven).

The IMDb user ratings were also used to consider audience reach in terms of societal interaction using the ratings' values themselves. The 22 films that gained >10k ratings are

noteworthy since they gained both more ratings than the average film in the sector, and also attained a 2.3 higher rating score than the sector's average (Chapter Seven). However, it should again be noted that the average IMDb user rating for the sector was consistently 5.5, a rating that was almost the same as the average for the industry as a whole.

The third measurement was based on the additions made to the narrative portfolio of British cinema. The empirical evidence presented indicated that the sector had broadened its story repertoire with genres and subgenres seldom used before the digital revolution. Specifically, that the sector increased the number of genre films it made, including those that were not historically associated with the sector such as science fiction and westerns, a finding that indicated the sector had become more aligned—in genre terms—with the rest of the industry (Chapter Seven). The data also indicated that the sector's narrative portfolio had become more complex, in two other ways. First, the sector saw a rise in the number of movies that illustrated themes on ethnicity, sexuality, gender, women and national identity, which had seldom been depicted before the digital revolution. Second, such films were increasingly being categorised online with main genre terms. For instance, in 2002, romance films with LGBT characters in the main roles were often categorised on under a subgenre term such as a 'gay romance', whereas by 2012 the use of such terminology had been replaced by the main genre term 'romance'. This suggests that the data held on such databases became more generic, obscuring a higher level of diversity in narrative (Chapter Seven).

The fourth measurement used to assess the cultural contribution of the sector considered this finding on diversity in more detail. As well as the arthouse, genre and working-class male-oriented films the sector made in 2000, the data showed that producers increased the number of movies they made that had main characters and/or key incidents that centred on female,

BAME and LGBT themes, or that were told in an indigenous language (Chapter Seven). For instance, in a cross-sectional survey of some of the sector's most award-winning films, it was found that the majority of low-budget films were unlikely to be bonded and that they portrayed stories in ways that added to the diversity of the sector's output. Some of the most celebrated films amongst this group challenged many of the public's views as to what defines a quintessential British movie, and in so doing offered evidence that attempts were being made to focus on niche audiences, in accordance with Ilott's advice (1996: 150); this trend applied particularly to women, and those from the BAME and regional sections of society.

The evidence that indicated greater diversity in genre, themes and representation confirmed not only that attempts were being made by producers to make films for audiences that had historically been ignored by the studios, but also that the sector had become a venue for thematic experimentation and risk taking. Not surprisingly, this same evidence also showed that low-budget films were increasingly being directed by individuals from underrepresented sections of society—sometimes at levels higher than proportional to their share of the UK population. Not only were more films being made by people in the regions, but more of them were being directed by women and by those from BAME communities. While the number of women directors in the sector was still below their representation in the population, it was higher than the industry average. In contrast, the proportion of BAME directors was higher than both their representation in the population and the industry average (Chapter Seven).

When all of these findings are considered together, it is apparent that the sector did make a substantial contribution, both economic and cultural, to the British film industry during the digital revolution. Not only did the sector continue to be a proving ground for new talent, just as it had during the analogue era, but its films were arguably a standard bearer for British

culture in hundreds of festivals around the world since they won most of the accolades gained by UK films, expanded audience reach and facilitated greater diversity in talent and stories told. As such, these findings confirm Northern Alliance's opinion that a core group of these films did have a 'clear potential to make a contribution to the UK's film culture' (2008: 15).

8.2 SWOT assessment

The fourth subsidiary question asked in Chapter One was: 'What are the research findings, and what do they suggest should be considered in public sector policies intended to establish a more sustainable and culturally representative British motion-picture industry?' To answer this question, the findings presented will now be assessed from a SWOT viewpoint (Chapter Two). This analysis identifies the main strengths and weaknesses of the supply chain, and the environmental opportunities and threats that might impact the sector's contribution. Until this point, this type of analysis has not been possible, but now that the sector is understood within the context of the changes that took place during the digital revolution, it is possible to consider all the major findings in a way that answers the main questions.

The less expensive supply-chain processes used in the sector offer some advantages to the British movie industry in the aftermath of the digital revolution. In terms of its strengths, the sector: is larger than the rest of the industry in output terms; offers minimal barriers to entry for production; is able to meet all commercial distribution quality requirements; is based in all regions of the country; is not reliant on direct investment from the public sector; is diverse in talent and stories told; continues to cater for *ars gratia gratis* motivations; experienced in telling British stories; and is a proven engine for experimentation (Table 22).

	ADVANTAGES <i>Advantages the low-budget sector has that could be of benefit to the wider UK film industry</i>	DISADVANTAGES <i>Disadvantages the low-budget sector has that need to be mitigated or avoided</i>
SUPPLY CHAIN FACTORS <i>Within the control of firm or sector (Internal factors)</i>	<p style="text-align: center;">STRENGTHS</p> <ul style="list-style-type: none"> - The sector is big in production terms - Minimal barriers to entry in production terms - The supply chain can meet all quality requirements - Lower APCs and MPCs, thus an affordable supply chain - Commercial distribution quality available at any budget - Production more regionally distributed and less reliant on the GLA as a production hub <ul style="list-style-type: none"> - No apparent production skills shortage - Not reliant on public sector direct investment - Diverse director pool and story portfolio <ul style="list-style-type: none"> - Good performance record in festivals <ul style="list-style-type: none"> - Strong <i>ars gratia artis</i> motives - Ideal sector for experimentation - Engine for increasing diversity 	<p style="text-align: center;">WEAKNESSES</p> <ul style="list-style-type: none"> - High project complexity and completion risk - Poor linkages with established distributors/agents - Poor linkages with broadcaster and online media providers <ul style="list-style-type: none"> - Inability to expand audience reach - Constant need for producer training and market knowledge <ul style="list-style-type: none"> - Inability to generate IPR values (quality, distribution) - Difficulties in retaining ownership of IPRs for bonded films <ul style="list-style-type: none"> - Producer professionalism - Lack of marketing expertise - Strong <i>ars gratia artis</i> motives
PESTEL FACTORS <i>Outside the control of firm or sector (External factors)</i>	<p style="text-align: center;">OPPORTUNITIES</p> <ul style="list-style-type: none"> - Primarily focuses on British stories for the UK market <ul style="list-style-type: none"> - Terrestrial broadcasters and online exhibition - Niche market opportunities (domestic and foreign) - Crowdfunding might prove more influential in future - New forms of monetarisation of IPRs (advertising) - Innovation likely to fuel growth in foreseeable future - Synergies with education and training organisations <ul style="list-style-type: none"> - New marketing (social media) opportunities 	<p style="text-align: center;">THREATS</p> <ul style="list-style-type: none"> - Lack of interest by industry leaders and public sector agencies - Constant changes in technology that require new investment <ul style="list-style-type: none"> - Constant changes in technology that require investment <ul style="list-style-type: none"> - Price-quality ratio stabilisation - Little indication producers have strong business skills

Table 22 - Strengths, weaknesses, opportunities and threats for the sector

These strengths provide certain opportunities for the domestic industry to further maximise the sector’s contribution. For instance, the sector specialises in British stories for the British market and the high levels of production provides an opportunity to work more in partnership with broadcasters and online exhibitors that serve this market. Furthermore, foreign and local markets that require ‘British content’ offer niche opportunities, rises in production will likely continue to be fuelled by new digital technology, the ability to make a movie will also most probably continue to be widely available, sources of private equity will likely continue to be based on small investment amounts and the chance to realise a lower MPC. Crowdfunding might also prove more influential but will likely remain more applicable to documentaries. The legal: free download platforms might offer new ways to monetarise IPRs (advertising). Finally, these factors offer the chance to work together with higher education and training institutions to promote best practice (Table 22).

The sector was also found to have some major weaknesses: the supply chain remains highly complex and risky; formal links with broadcasters, distributors and agents is still limited; a persistent inability to expand audience reach and generate IPR values indicates that quality issues persist; film producers have to constantly maintain their business skills and market knowledge; and there is no indication producers are retaining IPR ownership (Table 22). The disadvantages also included external threats that might prevent the sector from increasing its contributions to the British movie industry: private and public sector leaders might continue to ignore the potential value of the sector; constant changes in technology might result in higher tool replacement costs and MPCs; the constant need for current market knowledge could become more costly; the price-quality ratio might rise; and educational institutions might ignore the need for strong business and producer skills training (Table 22).

What can be seen from this SWOT analysis is both how little and how much things changed for the low-budget sector between the 1990s McIntyre and Ilott described and the end of the digital revolution as described herein. For example, on the side of little change: no evidence was found that Hollywood hegemony of the domestic market had lessened; nor that links with PSBs had improved; nor that producers were increasing the value and their rate of ownership of the IPRs they were attempting to create; nor that the level of influence of power relationships had been rebalanced by the ‘democratisation’ of the manufacturing sub-process; nor, finally, that any of these factors were going to change in the foreseeable future.

However, a great many changes did occur during the period and these changes resulted in McIntyre and Ilott’s low-budget strategies gaining renewed relevance. This is because many of the inhibitors that had once prevented their implementation on a large scale were no longer preventing production. The once formidable costs that kept MPCs levels prohibitively high

in the 1990s and were the main concern in *The Relph Report* (2002) were no longer inhibiting non-bonded movie production, especially for those films made for ≤£500k (Chapter Three). The analogue era issues, including the limited pool of talent located mostly in the GLA, the limited number of investment sources that all tended to be risk averse and unwilling to work with new producers, the large amount of resources needed to achieve the minimum quality requirements for theatrical distribution and the limited amount of equipment and sound stage facilities all were factors that were no longer quite so inhibiting to low-budget production. Therefore, while the competitive environment remained relatively the same before and after the digital revolution, the supply chain changed in ways that allowed for a readier assessment of the inherent advantages of reducing the financial risk of making a movie by lowering its costs (McIntyre 1994: 105), or of using market-based pricing methods in order to increase the profit potential of a film intended for a particular market (Ilott 1996). The production of a movie was no longer the issue, but distribution and achieving exhibition remained elusive.

8.3 Possible practical application of knowledge

The low-budget sector's strengths, weaknesses, opportunities and threats also clarify how the main research findings might be applied by public sector agencies, industry leaders and educators. The practical contribution of these findings are their provisioning of correlational evidence: that a large-scale democratisation of the supply chain had occurred; that the most plausible explanation for this transformation is a growth-from-innovation hypothesis; that low-budget production is always likely to be high as a result, irrespective of other PESTEL factors, since digital technology, rather than public sector investment, is the main factor that influences the supply chain; that the sector will always be—but on a larger scale—a means of experimenting with new and diverse talent; and that any strategy that aims to improve the

sustainability of the UK film industry necessitates the most efficient use of all the assets at the disposal of the nation, including those that have historically been largely ignored.

Public sector agencies could therefore benefit from some of these findings by considering the low-budget sector from five perspectives: training; leadership and lobbying; research and measurement; and including low-budget initiatives in all future strategies and initiatives. To be more specific, the first area of focus would be to place an even higher emphasis on skills training. This decision can be justified from the findings indicating that the public-sector sponsored training programmes were likely a significant enabler for regionalisation and that the implementation of a national education and skills training strategy likely achieved ‘more bang for buck’ when compared to direct investment expenditure. In effect, an increase in skills training could have a proportionally greater impact on supporting the sector, and for that reason it can justifiably be argued that funding appropriations should be reprioritised to education programmes and other priorities discussed presently. The focus of any expanded education initiative, however, should be on further producer skills training to minimise some of the current weaknesses in the supply chain. Initiatives towards that aim would improve risk reduction and project management skills (thus addressing the high risk of project failure due to project complexity), increase business skills on how to take advantage of current investment schemes, tax credits and VAT reclaim (thus addressing public sector funding can be increased), increase business and legal skills related to starting a company, crew rights, deferment requirements, protecting IPRs, marketing, budgeting to intended markets, the use of proven revenue-generating models, self and online distribution, and how to achieve higher quality levels, such as through the use of script development techniques.

The evidence presented can also be used to justify arguing that public sector agencies should expand their leadership and lobbying initiatives. For instance, agencies could make more of

a concerted effort to lobby the government and PACT in order to simplify the FTR process by specifying a new ‘low-budget threshold’—at a higher percentage to further support local independent production—along the lines SEIS are more easy to establish and do not need costly legal services. Leadership could also be taken in lobbying online content providers to acquire/host more low-budget content and offering a direct royalty payment per view to IPR rights holders. Other leadership initiatives could also be justified, including: lobbying one of the major domestic film festivals and BAFTA to have dedicated UK low-budget movie competitions; lobbying PACT and the established studios, distributors and agents in the industry to provide more ‘new producer’ networking events; and lobbying higher education institutions to offer more modular based film-management programmes.

It can now also be argued, based on the low-budget sector being the largest sector in terms of output, that a distinct measurement focus on the sector should be made by public sector agencies. In official publications, for instance, the sector should be a distinct area of study, including: levels of production, crew and story diversity, and the effectiveness of training programmes; the publishing of case studies of best practices and using these in film producer training initiatives (Appendix B); and the measuring of audience reach levels and festival performance. Public sector agencies could also track aspects of the sector by commissioning further industry research that would study ways to improve IPR revenue via self-distribution, including free downloads, as well as formulating sustainable business models with online content providers and even independent cinema owners. Other research could be to identify ways to gain economies of scale benefits, maximise crowdfunding opportunities and study how to improve the total efficiency and effectiveness of the supply chain process.

Finally, public sector agencies could commit to ensuring that a specific component of their national or regional movie production support strategies is to include initiatives, of the types

already noted, that specifically support the low-budget sector. For instance, the sector could be considered as a specific topic when producing reports such as *A Future for British Film*, in order to achieve a more concerted effort to support the sector and, at the same time, help improve the economic sustainability of the national movie industry (FPRC 2012).

8.4 Significance of findings

The aim of this thesis was to make a contribution to knowledge in the fields of British movie arts, movie economics and film-management practice by means of answering the subsidiary questions and by presenting an economic and cultural study of the low-budget sector during the digital revolution. The findings contained herein, along with the SWOT analysis and practical application possibilities just discussed, achieved this aim. For instance, the adjusted estimate of 1,552 films, the growth rate that achieved this total, the revised industry estimates and the MEA economic sizing of the sector were all contributions to movie economics. The adjusted estimate for the number of films produced, for example, augments the findings in *Low and Micro-Budget Film Production in the UK* since they not only provide a broader quantitative measure of the case study-based changes noted in the report, but they also offer a new quantified view for the transformational nature of those changes (2008). Along with the results from the studies of the technological innovations and how the sector was affected, these findings offer new correlational evidence for the growth-from-innovation hypothesis, and evidence that historical barriers to entry lessened during the period.

The thesis also advanced the field of British movie arts based on the results from the four measurements of cultural benefit: festival participation, audience reach, expanding diversity in narratives and talent, and notable movies. It is worth re-noting the use of these quantitative measurements provided new insight into how independent films performed

throughout the world, a measure of the level of social interaction achieved via the use of IMDb ratings (total amount and level) and measurements of diversity that all augmented the analysis done in *Stories We Tell Ourselves: The Cultural Impact of UK Film 1946–2006* by providing a more detailed perspective of the cultural contribution made by the sector (2009).

The contribution to film-management practice provided was also significant and, in addition to the way it framed some of the practical applications mentioned above, it is also worth noting the specifics of the models and information that comprise the basis of this contribution, since they can be used by any low-budget producer to plan and manage their productions more efficiently and more effectively (Chapter Two). The models include the hypothetical supply chain model, which can be reinterpreted for any low-budget project, and which includes: a list of major producer decisions; a list of decision contingencies; an enhanced listing based on Ilott's market-based budgeting method, which offers a means to build a top-down budget and reduce financial risk; and a detailed project plan outline that can be used to more effectively manage the supply chain process.

The thesis also provided evidence-based information that can also be used to enhance film-management practice. This information included: the reasoning for why low-budget movie producers should conduct an Ilott-like top-down budget during the planning sub-process by matching the intended audience, the intended primary exhibition channel and the likely IPR revenues with a proportionally costed production process; the fact that the sector is mostly influenced by technological advancements and subsequent changes in consumer behaviour, rather than by public sector investment levels or policy; the fact that the supply chain process remains highly complex and risky, despite practitioner-authors' descriptions, and the low-budget producer should not underestimate the challenges involved or their responsibility to

use good project management skills throughout the supply chain; the fact that the main challenge is not in completing the production sub-process, but in securing a commercial distribution; the fact that it is imperative for the producer to have access to good marketing, legal and relationship skills, and to use them in the planning sub-process; and the need to consider festival and production during the planning sub-process.

Finally, this study also provides movie historians with an additional evolutionary dimension to the existing history of British low-budget movies as described by Betts, Baillieu and Goodchild, and Chibnall. The benefits of this addition not only include a more representative economic history of the UK film industry by augmenting the relatively small amount of already published research, but also provide a new opportunity to assess how economic factors affected past periods of heightened production and whether those factors have any relevance to the current environment. As such, this study also offers researchers the benefit of being able to re-examine the results made in published industry reports and, as was already noted in the last section, the priorities of public-sector programmes.

8.5 Directions for further research

While this thesis has provided new understanding of the low-budget sector, certain time and financial constraints, as well as the need to achieve the research aim, often made it necessary to ignore other gaps in the literature related to low-budget films that would otherwise have been worthwhile to explore. For instance, the distribution performance of low-budget films warrants in-depth analysis from a film-management practice perspective since a qualitative case study analysis on how low-budget movies made for different budgets, perhaps along the lines of the 2008 Northern Alliance study where three budget levels for likely non-

bonded films were used, could help identify cases of best and worst practice that could be also used in producer skills training programmes.

Given the earlier discussed findings indicating that direct investment from public sector agencies was not a major factor causing the increase in production, and that the utilisation rate for the FTR and the reclaiming of VAT remained unknown, further study on this subject would also be valuable from a film-management viewpoint since it would possibly indicate: whether there are correlations between these sources of finance and delivery performance; the effectiveness of claiming the FTR and VAT; the effectiveness of direct investment from public sector agencies in supporting movies that eventually make a contribution to the total domestic movie industry. It might also possibly confirm the long-expressed view stated by PACT that the tax credits were vital to maintain production (2003: 32). The results from such a research study might further augment the findings in this thesis and suggest producer training initiatives that might benefit from including more practical instruction on how to claim tax credits and structure private sector investment—especially if the percentage of low-budget producers using these sources of finance were proved to be low. It might also provide evidence that could be used to assist public sector agencies in efforts to lobby government for a third-tier FTR level, such as for films made for \leq £2.5m, based on the rationale that the PACT/Equity agreement already recognises this distinction and that a more streamlined process by government might help foster independent production.

As noted in the definition for a low-budget film discussed in Chapter One, this thesis surveys both theatrically and non-theatrically distributed feature-length movies by both amateurs and professionals alike. The decision to include bonded and non-bonded films was therefore deliberate since it was based on Vogel's product traits, listed in his film library valuation

theory, that are necessary for a production to make a cultural and/or economic contribution. It would have therefore been impossible to achieve the aim of this study without the inclusion of all productions, irrespective if they gained a commercial distribution. Admittedly, it could be argued that ‘amateur films’ that failed: to gain any type of release, to be screened in any festival and which may suffer from a lack of skills on the part of the producer should either be excluded or separately identified and studied. Therefore, it could be beneficial in a further study to isolate the data on these films and consider if they should be studied separately.

It would also be beneficial from a public sector policy viewpoint to investigate in more depth the correlational evidence shown earlier, indicating that lottery-funded training programmes helped to fuel an expansion in regional production. However, rather than considering the growth in skilled personnel and considering that the locations of these skills become more evenly distributed around the country, the focus would be more on the effectiveness of these training programmes. For instance, published alumni name lists could be compared to key crew lists of low-budget films in order to measure the level of participation of such graduates in the sector; the degree of participation that they had in films judged to have made a significant economic and/or cultural contribution to the British film industry; and whether the low-budget sector was their first career credit. The findings of such a study could be also used to help confirm the effectiveness of such programmes in preparing the next generation of filmmakers and to what level the sector was part of that process.

8.6 Closing comments

This study—an assessment of a large body of cinematic work that has largely been ignored—achieves its research aim by providing: new correlational evidence which media arts and media economics researchers can use to reappraise the findings of earlier investigations and

domestic movie industry reports; a new evidence-based perspective on how technological factors impacted a largely unstudied sector of the movie industry; an additional evolutionary dimension which media historians can use to develop a more representative history of the British motion-picture industry; and an evidence-based reference work which public-sector policymakers can use to re-evaluate the effectiveness of existing investment programmes and to develop new strategies based on a more effective use of all the sectors in the industry.

The evidence presented indicates that a vibrant UK low-budget film sector emerged over the course of the digital revolution, and that this sector was radically transformed by the arrival of digital technology. The thesis found: that long-standing barriers to production had been removed; that barriers to traditional distribution likely intensified; that the sector became more diverse in the stories it told and the individuals who told them; and that low-budget producers did make a considerable economic contribution to UK independent production and provided a cultural benefit to British cinema. The question therefore no longer concerns whether the budget realignment proposals of the 1990s could be more applicable in the post-digital revolution era, but rather concerns how this situation can be exploited in ways that help achieve a more sustainable domestic movie industry.

It is apparent from the main findings that the low-budget sector did indeed gain the technical capability to play a more important role in achieving this desire. However, for the sector to fulfil this role, it is also clear that a new attitude has to be adopted by the relevant leaders in the public sector and industry. This new attitude will still need to include acceptance that: the sector will never have the same level of professionalism, business acumen and quality that the Hollywood studios possess; that advancements in technology will continue to shape the low-budget supply chain; and that the sector's contribution to the British film industry is

best measured within the context of the industry's peculiarities and a realistic expectation of both the potential economic and cultural benefits. This new attitude, however, must also include the view that the sector is now an exciting, important and integral part of the British film industry. As such, the sector is: an essential and low-cost generator of creative and diverse talent; an ideal proving ground for new ideas in production and exhibition; and offers cost-efficient supply chains that are suited to addressing consumer markets for which a diverse selection of British stories is desired. To achieve such a change in attitude means that the sector can no longer be often overlooked, but instead must be specifically supported.

It is also recognised that the evidence and analysis presented in this thesis are unlikely to be enough alone to enable such a change in attitude by the relevant agencies and industry leaders. After all, it could still be argued that low-budget film production will always occur irrespective of the level of demand by distributors and that most producers are unlikely to generate any revenue. Nevertheless, it is hoped that this thesis will help reignite the limited discourse on the subject by reminding or alerting 'the powers that be' that the main legacy of the digital revolution during the 2000s is that it created an entirely a new paradigm that offers the opportunity to utilise to a greater effect a predominantly self-funding sector of the UK industry that is almost entirely dedicated to telling British stories for British audiences. If more proactive attempts are made to engage with more of the producers of these films, at an earlier stage in their supply chains, then it should be possible to increase the overall contribution of the sector so that these actions would benefit the entire British movie industry. The question then becomes, 'Why not try to exploit this situation for all it's worth?'

APPENDIX A: Production census list

Title:	Director:	Producer:	Screenwriter:	Cast (Top Billed):	Production Company:	IMDb Genre:	Year Finished
<i>1234</i>	Borg, Giles	Kearney, Simon	Borg, Giles	Bonar, Ian	Carson Films	Drama	2008
<i>1 Day</i>	Woolcock, Penny	Bosworth, Claire	Woolcock, Penny	Duffus, Dylan	Blast! Films	Drama	2009
<i>10</i>	Knight, Paul	Knight, Paul	Knight, Paul	O'Keefe, Jamie	New Breed Productions Ltd UK	Action	2010
<i>12 in a Box</i>	McKenzie, John	Windwood, Bruce	McKenzie, John	Mitchell, Brian	Masses Entertainment	Comedy	2007
<i>13th Sign, The</i>	Mason, Adam	Brand, Nadja	Acton, Jonty	Brand, Nadja	Paranoid Celluloid	Horror	2000
<i>16 Days till the Rest of your Life</i>	Isserow, Lee	Sumner, Esther	Isserow, Lee	Eccles, Cathy	Opiate of the People Films	Comedy	2004
<i>16 Years of Alcohol</i>	Jobson, Richard	McAlpine, Hamish	Jobson, Richard	McKidd, Kevin	Tartan Films	Drama	2003
<i>24 Hour Party People</i>	Winterbottom, Michael	Eaton, Andrew	Cottrell-Boyce, Frank	Coogan, Steve	Revolution Films	Comedy	2002
<i>24 Lines</i>	Astbury, Helena	Astbury, Jake	Astbury, Jake	Lundholm, Juliet	The Astburys	Mystery	2011
<i>25Gs</i>	Li, Baldwin	Li, Baldwin	Hall, Andy	Moan, Joe	Honlodge Productions	Crime	2008
<i>31 North 62 East</i>	Loraine, Tristan	Loraine, Tristan	Loraine, Leafwine	Rhys-Davies, John	Fact Not Fiction Films	Thriller	2009
<i>33 Times Around the Sun</i>	Hardwick, John	Schlesinger, Derrin	Hardwick, John	Rudolph, Lars	Panopticon Pictures	Fantasy	2005
<i>43 Pounds</i>	Davies, Rhys	Davies, Rhys	Duncan, Rob	Herbert, Christopher J	Hive Films Ltd UK	Comedy	2011
<i>500 Miles North</i>	Massey, Luke	Higginbottom, Julia	Massey, Luke	Morgan, Joseph	Read Books Ltd UK	Drama	2012
<i>7lives</i>	Wilkins, Paul	Parker, Mike	Wilkins, Paul	Ashfield, Kate	Starfish Films	Fantasy	2011
<i>7th Dimension, The (aka Beacon 77)</i>	Watson, Brad	de la Mare, Janice	Moon, Debbie	Adams, Kelly	Revolt Films	Sci-fi	2009
<i>8.5 Hours</i>	Lally, Brian	Lally, Brian	Lally, Brian	Callaghan, Lynette	Instigator Films	Drama	2008
<i>9 Songs</i>	Winterbottom, Michael	Eaton, Andrew	Winterbottom, Michael	Stilley, Margo	Revolution Films	Drama	2004
<i>A bit of Tom Jones?</i>	Watkins-Hughes, Peter	Lysaght, Will	Watkins-Hughes, Peter	Berry, Matt	Tred Films	Comedy	2009
<i>A Certain Romance</i>	Robertson, Gabriel	de Pellette, Alan	Robertson, Gabriel	Campbell, Scott	Aficionado Films	Comedy	2009
<i>A Congregation of Ghosts</i>	Collicott, Mark	Collicott, Mark	Collicott, Mark	Woodward, Edward	Whitechapel Films Ltd UK	Drama	2009
<i>A Day of Violence</i>	Ward, Darren	Andrews, Dave	Ward, Darren	Radice, Giovanni	Giallo Films	Crime	2010
<i>A Gospel of Us (aka The Fire Under the Cross, aka Port Talbot Passion)</i>	McKean, Dave	Griffiths, Keith	Sheers, Owen	Sheen, Michael	Rondo Media Ltd UK	Drama	2012
<i>A Lonely Place to Die</i>	Gilbey, Julian	Loveday, Mike	Gilbey, Julian	George, Melissa	Carnaby International	Adventure	2011
<i>A Morass</i>	Bordas, Shane James	Taliana, Ross	Bordas, Shane James	van Ommen, Vincent	Paradyll Productions Ltd UK	Thriller	2010
<i>A Mutual Friend: The secret life of John Ebneigh</i>	Le, Barry	Riad, Christian	Le, Barry	Riad, Christian	Benned Noir Films	Drama	2010
<i>A New Day in Old Sana'a</i>	Hirsi, Bader Ben	Abdali, Abbs	Hirsi, Bader Ben	Saber, Nabil	Felix Films Entertainment	Drama	2005
<i>A Night in the Woods</i>	Parry, Richard	Niblo, Allan	Parry, Rupert	McNairy, Scoot	Vertigo Films	Horror	2011
<i>A Place to Stay</i>	Thompson, Marcus	Thompson, Marcus	Thompson, Marcus	O'Maonlai, Colm	Hollywood Daze Motion Pictures UK	Drama	2003
<i>A Spanking in Paradise</i>	Thallon, Wayne	Thallon, Wayne	Thallon, Wayne	Gaffney, John	Veritas GB Ltd UK	Comedy	2010
<i>A Thousand Kisses Deep</i>	Lustig, Dana	Granier-Deferre, Christopher	Kustanovich, Alex	Scott, Dougray	Goldcrest Pictures, Tomori Films	Thriller	2011
<i>A Wedding Most Strange</i>	Garlick, Trevor	Garlick, Trevor	Garlick, Trevor	Finch, Chris	Trinity X Productions Ltd UK	Comedy	2011
<i>Abraham's Point</i>	Price, Wyndham	Purves, Tony	Price, Wyndham	Crook, Mackenzie	The Film Partnership	Thriller	2008
<i>Absolutely Wasted</i>	Lacey, David	Lacey, David	Lacey, David	Rashid-Reilly, Sharon	Blootered Films	Comedy	2005
<i>Accidental Existence of Me</i>	Haque, Riyadh	Haque, Riyadh	Haque, Riyadh	Overland, Caroline	Trash Arts Ltd UK	Drama	2011
<i>Across the River</i>	Malone, Warren B	Carla, Jeannie	Malone, Warren B	Charles, Keir	Penguins with Freckles Ltd UK	Drama	2012
<i>Act of God</i>	Faughnan, Sean	O'Hagan, Nick	Faughnan, Sean	Suchet, David	AOG Films	Thriller	2009
<i>Act of Grace</i>	Kershaw, Noreen	Field, Alan	Pye, Marc	Gregory, Leo	Embrace Productions	Thriller	2008
<i>Actors</i>	Vernon, Ian	Vernon, Ian	Vernon, Ian	Simpson, Robin	Biffa Productions Ltd.	Comedy	2004
<i>Acts of Godfrey</i>	Daukes, Johnny	Schlesinger, Tony	Daukes, Johnny	Callow, Simon	Goldcrest Post Production London	Drama	2012
<i>Adored, The</i>	Medland, Carl	Medland, Carl	Medland, Carl	Martin-Simpson, Laura	Discovery Films UK Ltd	Thriller	2012
<i>Adulthood</i>	Clarke, Noel	Isaac, George	Clarke, Noel	Clarke, Noel	Cipher Films	Drama	2007
<i>Advanced Warriors</i>	Dymond, Andrew	Dymond, Andrew	Dymond, Andrew	Nichols, Rebecca	LightworX CGI Ltd.	Action	2003
<i>Adventures of George the Projectionist, The</i>	Higham, Tim	Higham, Tim	Higham, Tim	Warner, George	Pecora Squisita Productions	Comedy	2003
<i>Africa in her Blood (aka Goodnight Mr Smith)</i>	Carretta, Al	Carretta, Al	Carretta, Al	Carretta, Al	Nightpiece Media Ltd UK	Action	2011
<i>Afterlife</i>	Peebles, Alison	Aitken, Catherine	Gibb, Andrea	Duncan, Lindsay	Gabriel Films	Drama	2003

Title:	Director:	Producer:	Screenwriter:	Cast (Top Billed):	Production Company:	IMDb Genre:	Year Finished
<i>Afterwards</i>	Bowling, Kivmars	Bowling, Kivmars	Bowling, Kivmars	Malkus, Beate	Dog Animal Films	Drama	2009
<i>Agent, The</i>	Manning, Lesley	Wagner, Martin	Wagner, Martin	Beck, William	Pinter & Martin	Drama	2008
<i>Aggressive Behavior (aka Unwelcome)</i>	Smith, Stefan	Rolfé, Christopher	Barfoot, Chris	Kay, Marysia	Dark Hour Productions	Thriller	2010
<i>Ahlaam (aka Dreams)</i>	Al-Daradji, Mohamed	Al-Daradji, Mohamed	Al-Daradji, Mohamed	Adel, Aseel	Human Film	Drama	2006
<i>Al's Lads (aka Capone's Boys)</i>	Standeven, Richard	Barnes, Peter	Gee, Marc	Warren, Marc	Alchemy Pictures	Crime	2002
<i>Aimless</i>	Tobbell, Tobias	Tobbell, Tobias	Tobbell, Tobias	Arnold, Keith	Two Bells Productions Ltd UK	Comedy	2009
<i>Airborne (aka Panic Zone)</i>	Williams, Alexander	Burns, Dominic	Chronnell, Paul	Hamill, Mark	Press on Features Ltd UK	Horror	2012
<i>AKA</i>	Roy, Duncan	West, Richard	Roy, Duncan	Leitch, Matthew	Bard Entertainments	Drama	2002
<i>Albatross</i>	MacCormick, Niall	Sturges, Adrian	Rafn, Tamzim	Koch, Sebastian	CinemaNX	Drama	2010
<i>Alien Rising</i>	Moran, Nigel	Moran, Nigel	Moran, Nigel	Johnson, Kieron	NGM Films	Horror	2007
<i>All Bar Love</i>	Derbyshire, James	Tredget, Aubs	Boggio, Julia	Hancock, Jeremy	Te Papa Films	Comedy	2008
<i>All Good Dogs Lie Down</i>	McMonagle, Kevin	McMonagle, Kevin	Doyle, Tom	Doyle, Tom	Ultraviolet Media	Drama	2009
<i>All Together, The</i>	Claxton, Gavin	Raftery, Annabel	Claxton, Gavin	Freeman, Martin	Establishment Films	Comedy	2007
<i>Almost Adult</i>	Khan, Yousaf Ali	Hibbin, Sally	Munro, Rona	Milandu, Victoire	Parallax Independent Pictures	Drama	2006
<i>Alpha Male</i>	Wilde, Dan	Styler, Trudie	Wilde, Dan	Ehle, Jennifer	Xingu Films	Drama	2006
<i>Amazing Grace, The</i>	Amata, Jeta	Arce, Alicia	Cleverdon, Scott	Moran, Nick	Jeta Amata Concepts	Drama	2006
<i>Ambition</i>	Forzy, Nicolas	Beranger, Axel	Forzy, Nicolas	Rutherford, Matthew	Rock Solid Entertainment	Thriller	2005
<i>Ambleton Delight</i>	Parkes, Daniel	Yamasaki, Itsuka	Yamasaki, Itsuka	Capron, Brian	Parkes Productions	Drama	2009
<i>American Cousins</i>	Coutts, Don	Matheson, Margaret	Casci, Sergio	Hedaya, Dan	Little Wing Films	Drama	2003
<i>Amina</i>	Ashaiku, Christian	Ashaiku, Christian	Ashaiku, Christian	Jalade, Omotola	AOC Communications Ltd UK	Comedy	2011
<i>Among Friends</i>	Saunders, Richard	Saunders, Richard	Saunders, Richard	Peter-Watkins, Christine	Freestanding Films	Drama	2003
<i>An Act of Terror</i>	Nadeem, Shahid	Mirza, Sarned	Nadeem, Shahid	Bukhari, Asim	Stepping Stone Films	Drama	2009
<i>An Actor's Life: Less Ordinary</i>	Rigg, Stephen	Rigg, Stephen	Rigg, Stephen	Barantini, Philip	Blackdog Productions Ltd UK	Drama	2012
<i>An American Nobody in London</i>	Bashar, Anit	Bashar, Anit	Bashar, Anit	O'Driscoll, Ciaran	Perception Pictures	Romance	2006
<i>An Angel for May</i>	Cokeliss, Harley	Cowan, Michael	Milligan, Peter	Wilkinson, Tom	Spice Factory	Drama	2002
<i>Ana Begins</i>	O'Connor, Ben	Tull, Edward	O'Connor, Ben	Huison, Stevie	Feature One	Drama	2009
<i>Anaphylaxis</i>	Mokhtar, Ayman	Mokhtar, Ayman	Mokhtar, Ayman	Defferary, Guy	FilmArt Productions	Drama	2010
<i>Angels Crest</i>	Dellal, Gaby	Cowan, Leslike	Trieschmann, Catherine	Dekker, Thomas	Process Film	Drama	2011
<i>Animals</i>	Alon, Arik	Alon, Arik	Hurn, Jon	Conway, Paul	Jaffa Films Limited	Drama	2003
<i>Another Day in Hell</i>	Kane, Stuart	Ennis, Siobhan	Kane, Stuart	Bowman, Colleen	Courtesan Films	Horror	2009
<i>Anuvahood</i>	Deacon, Adam	Deacon, Adam	Deacon, Adam	Deacon, Adam	Gunslinger	Comedy	2011
<i>Anxiety</i>	Ogilvie, Alasdair	Ogilvie, Alasdair	Ogilvie, Alasdair	Abomeli, Charles	Mortal Films	Drama	2000
<i>Any Minute Now</i>	Goddard, Peter	Barber, Darren	Goddard, Peter	Calvey, Mhairi	Devil's Avalanche Films Ltd UK	Horror	2012
<i>Archipelago</i>	Hogg, Joanna	Griffiths, Gayle	Hogg, Joanna	Hiddleston, Tom	Whild Horses Film Company	Drama	2010
<i>Are You Ready for Love?</i>	Grace, Helen	Sargent, Trudy	Trippini, Roberto	Berrington, Elizabeth	Carnaby International	Romance	2007
<i>Arjun and Alison</i>	Sharma, Sidharth	Sharma, Sid	Conway, Andy	Squeri, Monique	Sid Said Sid Productions	Action	2011
<i>As You Like It</i>	Walkington, Andrew	Deeley, Matthew	Shakespeare, William	Greenwood, Imogen	The Co-operative British Youth Film Academy	Drama	2011
<i>Ashes and Sand</i>	Blagden, Bob	Holmes, Andrew	Upton, Judy	Moran, Nick	Open Road Films	Drama	2003
<i>Astropia (aka Dorks & Damsels)</i>	Gudmundsson, Gunnar	Kemp, Julius	Borg, Otto Geir	Jonsdottir, Ragnhildur	Film & Music Entertainment	Comedy	2007
<i>Asylum (aka The Refuge)</i>	Barker, Nigel	Roffe, Melloney	Barker, Nigel	Condes, Gary	Maximise Ltd.	Drama	2003
<i>Asylum Nights</i>	Watson, Brad	de la Mare, Janice	Watson, Brad	Carlyle, Adrienne	Revolt Films	Horror	2004
<i>At the Foot of a Tree</i>	Reid, R S	Reid, Kelly Jo	Reid, R S	Reid, Reece	Mysterious Tea	Drama	2009
<i>Auction, The</i>	Hossain, Zakir	Ahmed, Ashuk	Hossain, Zakir	Begum, Runa	Sky Visual	Drama	2008
<i>Autochrome</i>	Astbury, Jake	Astbury, Jake	Astbury, Jake	Mitchell, Helena	HJX Films	Drama	2008
<i>Awaydays</i>	Holden, Pat	Hughes, David	Sampson, Kevin	Bell, Nicky	Red Union Films	Drama	2009
<i>Axe Raiders</i>	Moffat, Robbie	Sutherland, Mairi	Moffat, Robbie	Baxter, Marmie	Palm Tree UK	Action	2005
<i>Axed</i>	Driscoll, Ryan Lee	Driscoll, Ryan Lee	Driscoll, Ryan Lee	Hansler, Jonathan	Shining Light Productions	Thriller	2012
<i>Baby Blues</i>	Carey-Jones, Owen	Carey-Jones, Owen	Carey-Jones, Owen	Talacko, Nicky	Carey Films Ltd.	Romance	2002
<i>Baby Juice Express, The</i>	Hurst, Mike	Cowan, Michael	Hurst, Mike	Moran, Nick	Spice Factory	Comedy	2002
<i>Bad Company</i>	King, Jason	Price, Samantha	King, Jason	Sier, Sonya	Sparkler Productions	Drama	2010

Title:	Director:	Producer:	Screenwriter:	Cast (Top Billed):	Production Company:	IMDb Genre:	Year Finished
<i>Bad Day</i>	Diaz, Ian David	Ashwell, Gena Helen	Diaz, Ian David	Goose, Claire	7th 12th Collective Ltd.	Thriller	2008
<i>Bad Day (aka Fluffy Little Bunnies)</i>	Makin, Dominic	Dubois, Dominic	Makin, Dominic	Thomas, Brad	Makin Movies	Comedy	2004
<i>Bad Place</i>	Winter, Darren	Winter, Darren	Winter, Darren	Senn, Paul	Winter Productions	Horror	2003
<i>Badinage</i>	Harrison, Oliver	Harrison, Oliver	Harrison, Oliver	Smith, Steve	Celestial Pictures	Fantasy	2007
<i>Baker, The (aka Assassin in Love)</i>	Lewis, Gareth	Sturges, Adrian	Lewis, Gareth	Lewis, Damian	Grandville Pictures	Comedy	2007
<i>Ballad of Des and Mo</i>	Fair, James	Hoctor, Gary	Fair, James	Cahill, Michael F	Hello Camera	Romance	2010
<i>Banana Boys</i>	Iqbal, Zafar	Iqbal, Zafar	Iqbal, Zafar	Iqbal, Zafar	Zafar Iqbal Films Ltd.	Crime	2007
<i>Bane</i>	Eaves, James	Eaves, James	Eaves, James	Dawnay, Sophia	Amber Films	Sci-fi	2008
<i>Barn, The</i>	Webster, Ruairidh	Boje, Steffan	Broder, Jake	Broder, Jake	Barn Pictures Ltd.	Fantasy	2004
<i>Barry and Tarquin</i>	Colebrook, Tom	Nicholls, Simon	Colebrook, Tom	Webb, Barry	Allsopp Contemporary Motion Picture House Films Ltd UK	Drama	2006
<i>Baseline (aka The Baseline)</i>	O'Loughlin, Brendon	Bryan, Rupert	Connor, Freddie	Foreman, Jamie	Kandu Arts for Sustainable Development	Action	2010
<i>Bash Street</i>	Deedigan, Ed	Redfern, Michelle	O'Neill, Con	O'Neill, Con	Angelica Entertainments Ltd UK	Drama	2011
<i>Bashment</i>	Beadle-Blair, Rikki	Beadle, Carleen	Beadle-Blair, Rikki	Bonin, Ludvig	Yellow Fever Productions Ltd UK	Drama	2010
<i>Battle of the Bone</i>	Clarke, George	Clarke, George	Clarke, George	Jenkins, Laura	Whatever Pictures Ltd.	Action	2008
<i>Be All and End All, The</i>	Webb, Bruce	Webb, Bruce	Lewis, Steve	Byrne, Eugene	Whatever Pictures Ltd.	Comedy	2009
<i>Beginner's Luck</i>	Callis, James	Evans-Lombe, Harriet	Callis, James	Delpy, Julie	Angle Eye	Drama	2001
<i>Behold the Lamb</i>	McLluff, John	Jackson, Kevin	McLluff, John	Bhroin, Sandra Ni	Dumbworld Productions	Comedy	2011
<i>Being Considered</i>	Newman, Jonathan	Newman, Jonathan	Newman, Jonathan	Dreyfus, James	Serendipity Productions	Comedy	2000
<i>Being Sold</i>	Hawkins, Phil	Costelloe, Michael	Magrath, Aidan	Dane, Christopher	Stone Cross Films Ltd UK	Comedy	2011
<i>Bell Pool, The</i>	Tibbetts, Joe	Kassell, Matt	Tibbetts, Joe	Tanswell, Grace	Boilerhouse Media Ltd UK	Drama	2010
<i>Beneath a Neon Tide</i>	Edwards, Simon P	Edwards, Simon P	Edwards, Simon P	Woodyatt, Ann-Marie	Kill the Sunset Pictures Ltd UK	Drama	2012
<i>Best Laid Plans</i>	Blair, David	Knowles, Michael	Green, Chris	Graham, Stephen	Made Up North Productions Ltd UK	Drama	2012
<i>Best Little Whorehouse in Rochdale</i>	Vernon, Ian	Vernon, Ian	Vernon, Ian	Williams, Jeni Howarth	Biffa Productions Ltd UK	Comedy	2010
<i>Best Man, The</i>	Crocker, Jon	Robinson, Emily	Robinson, Emily	Swanson, Danny	Felix Films	Action	2005
<i>Betsy and Leonard</i>	Pucher, Bernhard	Pucher, Bernhard	Foster, Luke	Anderson, Samuel	Iron Box Films Ltd UK	Comedy	2012
<i>Better Things</i>	Hopkins, Duane	Hailay, Samm	Hopkins, Duane	McLifattrick, Liam	Wellington Films	Drama	2008
<i>Beyond Recognition</i>	Muschamp, Tom	Clementel, Stefano	Muschamp, Tom	Jones, Jimmie	Freefall Productions	Thriller	2003
<i>Beyond the Fire</i>	Murphy, Maeve	Alexander, Helen	Murphy, Maeve	Seymour, Cara	Playing with Fire	Romance	2009
<i>Beyond the Pole</i>	Williams, David L	Williams, David L	Warhurst, Neil	Thomas, Rhys	Shooting Pictures	Comedy	2009
<i>Bhavishya: The Future</i>	Kaushik, (Dr) Nikhil	Kaushik, (Dr) Nikhil	Kaushik, (Dr) Nikhil	Jaffrey, Saeed	Dishak Films	Drama	2006
<i>Bicycle Day (aka Bad Day)</i>	Morter, Damian	Morter, Nicola	Morter, Damian	Morter, Damian	Safehouse Pictures	Thriller	2011
<i>Big Fat Gypsy Gangster</i>	Grover, Ricky		Grover, Ricky	Berkoff, Steven	Black & Blue Films	Comedy	2011
<i>Big Font Large Spacing (aka Avoiding Christian Bale)</i>	Allen, Paul Howard	Muller-Rommel, Vivien	Allen, Paul Howard	Kristian, James	33Story Productions Ltd UK	Comedy	2009
<i>Big Nose and Twinkle Toes</i>	Finnigan, Duncan	Finnigan, Duncan	Finnigan, Duncan	Finnigan, Duncan	Finscotland Productions	Drama	2005
<i>Big Slick, The</i>	Hughes, Graham	Hughes, Graham	Grantham, Keith	Cunningham, Scott	Enlightened Monster Productions Ltd UK	Comedy	2011
<i>Big Society the Musical</i>	Harwood, Lynne	Mitchell, Nicola	Wilson, Esther	Simms, Paula	First Take Ltd UK	Drama	2012
<i>Big Things</i>	Devenport, Mark	Dennis, Luke	Claassen, Tony	Claassen, Tony	Anonymous Room	Comedy	2009
<i>Bigga Than Ben</i>	Halewood, Suzie	Holford, Liz	Halewood, Suzie	Chadov, Andrei	Bigga Than Ben Ltd.	Drama	2007
<i>Bike Thief, The</i>	Smarg, Dan	Ablitt, Richard	Smarg, Dan	Baxendale, Simon	Maverick Filmworks Inc	Action	2005
<i>Billboard</i>	Patterson, Jamie	Holman, Nathalie	Patterson, Jamie	Cox, Anna	Jump Start Productions Ltd UK	Horror	2011
<i>Birds of Heaven (aks Les Oiseaux du Ciel)</i>	de Latour, Eliane	Simon, Christopher	de Latour, Eliane	James, Fraser	Arte France Cinema	Drama	2005
<i>Birthday</i>	McCall, Alex	Beedham, Robert	Beedham, Robert	Cavanah, Robert	Glasgow Films Ltd UK	Horror	2011
<i>Bits n' Bites</i>	Finnigan, Duncan	Finnigan, Duncan	Finnigan, Duncan	Duffy, Pauline	Finscotland Productions	Drama	2007
<i>Bitter Sweet (aka Hwerow Hweg)</i>	Kovacs, Antal	Farmer, Paul	Kovacs, Antal	Rule, Helen	West-Coast Productions Ltd	Drama	2002
<i>Black Biscuit</i>	Federico, Fabrizio	Federico, Fabrizio	Federico, Fabrizio	Federico, Fabrizio	Ants Productions Ltd UK	Drama	2011
<i>Black Coffee</i>	Finnigan, Wilma Smith	Finnigan, Duncan	Finnigan, Wilma Smith	Finnigan, Duncan	Finscotland Productions	Drama	2002
<i>Black Pond</i>	Sharpe, Will	Brocklehurst, Sarah	Sharpe, Will	Langham, Chris	Black Pond Films	Comedy	2011
<i>Blackball</i>	Smith, Mel	Gay-Rees, James	Firth, Tim	Kay, Paul	Midfield Films	Comedy	2003
<i>Blind Flight</i>	Furse, John	Hibbin, Sally	Furse, John	Hart, Ian	Parallax Pictures	Drama	2003
<i>Blind Spot, The</i>	Kirkby, Tim	Kirkby, Tom	Kirkby, Tim	Beales, Daniel	Avalon Motion Pictures	Thriller	2003

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<i>Blinded</i>	Yule, Eleanor	van Heek, Oscar	Yule, Eleanor	Mullan, Peter	Oscar Films	Drama	2003
<i>Blood</i>	Cantor, Charly	Markham, Simon	Cantor, Charly	Rawlins, Adrian	Cantor-Markham Productions	Horror	2000
<i>Blood and Roses</i>	Aitken, Simon	Aitken, Simon	Woodiwiss, Ben	Kay, Marysia	Independent Runnings	Horror	2009
<i>Blood Army</i>	Moore, Will	Harper, Frank	Moore, Will	Bamake, Edde	Argy Films Ltd UK	War	2010
<i>Blood Relative</i>	Richardson, Miles	Tizzard, Rob	Tizzard, Rob	Foxon, Richard	Megropolis1 Productions	Horror	2004
<i>Bloodmyth</i>	Rackham, John	Rackham, John	Rackham, John	Clayton, Natalie	Rouges Yarn Film	Horror	2006
<i>Bloody Sunday</i>	Greengrass, Paul	Redhead, Mark	Greengrass, Paul	Nesbitt, James	Granada Film	Drama	2002
<i>Blue Tower, The</i>	Bhide, Smita	Nuttgens, Jamie	Bhide, Smita	Galeya, Abhin	Monkey in Heaven Films	Thriller	2008
<i>Boat People, The</i>	Curry, Rob	Fletcher, Anthony	Fletcher, Anthony	Elouahabi, Nabil	Fifth Column Films	Thriller	2007
<i>Bodyguard: A New Beginning</i>	Cheung, Chee Keong	Cheung, Chee Keong	Cheung, Chee Keong	Tagawa, Cary-Hiroyuki	Intense Productions	Action	2008
<i>Boheme</i>	Britten, Tony	Partridge, Phil	Britten, Tony	Bruce, Graham MacKay	Music Theatre London Films	Musical	2000
<i>Bollywood Queen</i>	Wooding, Jeremy	Piette, Jason	Wooding, Jeremy	McAvoy, James	Spice Factory	Drama	2002
<i>Bomber</i>	Cotter, Paul	Ryan, Maureen	Cotter, Paul	Taylor, Shane	Boris Films	Comedy	2009
<i>Bombil and Beatrice</i>	Gustad, Kaizad	Kamaran, Manu	Gustad, Kaizad	McGuinness, Katie	Tarlac Limited	Thriller	2007
<i>Bonded by Blood</i>	Bennett, Sacha	Stone, Terry	Muir, Graeme	Philips, Simon	Gateway Films	Crime	2010
<i>Booked Out</i>	O'Neil, Bryan	O'Neil, Bryan	O'Neil, Bryan	Syms, Sylvia	BON Productions	Comedy	2012
<i>Border Post (aka Karaula)</i>	Grilic, Rajko	Anastasov, Vladimir	Grilic, Rajko	Gojanovic, Toni	Refresh Production	Action	2006
<i>Borges and I</i>	Harris, Emily	Bentovim, Jonathan	McColl, Chris	Fowler, Dominic	Indivision Films	Drama	2009
<i>Born of Hope</i>	Madison, Kate	Madison, Kate	DiSante, Paula	Dane, Christopher	Actors at Work Productions	Action	2009
<i>Born Romantic</i>	Kane, David	Kane, David	Kane, David	Ferguson, Craig	BBC	Comedy	2000
<i>Borrowed Time</i>	Bishop, Jules	Kaempfer, Olivier	Bishop, Jules	Davis, Philip	Parkville Pictures Ltd UK	Comedy	2012
<i>Box, The</i>	Wilcox, Jason	Wilcox, Jason	Wilcox, Jason	Monkewitz, Ariette	Verdley Productions	Horror	2006
<i>Boxed</i>	Comer, Marion	Penn, Laurence	Comer, Marion	Jordan, Tom	Fireproof Films	Drama	2002
<i>Boxing Day</i>	Rose, Bernard	Roeg, Luc	Rose, Bernard	Huston, Danny	Independent Film Productions Ltd UK	Drama	2012
<i>Boy Called Dad, A</i>	Percival, Brian	Knowles, Michael	Rutterford, Julie	Hart, Ian	Made Up North	Drama	2009
<i>Boy with a Thorn in His Side, The</i>	Jeavons, Mark	Jeavons, Mark	Jeavons, Mark	Sedgley, Iec	Sepia Films	Comedy	2004
<i>Brannigan's March</i>	Knudsen, Erik	Janet, Erik	Knudsen, Erik	Fowler, Philip	One Day Films Limited	Drama	2004
<i>Brash Young Turks</i>	Mahmood, Ash	Mahmood, Ash	Danquah, Paul	Latouche, Melissa	Transient Film Exchange Ltd UK	Drama	2012
<i>Break My Fall</i>	Wichmann, Kanchi	Wizz, Billy	Wichmann, Kanchi	Redstone, Kat	Break My Films	Drama	2011
<i>Breathe</i>	Winter, Nicholas	Lyons, Gina	Winter, Nicholas	Harnett, Ricci	Porcelain Films Limited	Drama	2009
<i>Brilliantlove (aka The Orgasm Diaries, Brilliant Love, Erotology)</i>	Horner, Ashley	Liegis, Karl	Conway, Sean	Browne, Liam	Pinball Films Limited	Romance	2010
<i>Broken</i>	Mason, Adam	Mason, Adam	Mason, Adam	Mason, Nadja Brand	Brand Mason Ltd	Horror	2006
<i>Broken Lines (aka There for Me)</i>	Aprahamian, Sallie	Cummins, Douglas	Fredenburgh, Dan	Bettany, Paul	Axiom Films	Drama	2008
<i>Bronson</i>	Refn, Nicolas Winding	Preston, Rupert	Brock, Brock Norman	Hardy, Tom	Str&Jacket Creations	Action	2008
<i>Bubonic Play, The</i>	McCrystal, Cal	McCrystal, Cal	Nero, Piggy	Baynton, Mat	Nero, Piggy	Musical	2008
<i>Buck Rules, The</i>	Lennox, Sam	Lennox, David	Lennox, Sam	Burns, Dominic	Tenterhooks Productions	Comedy	2006
<i>Buffering</i>	Flaxstone, Darren	Martin, Christian	Flaxstone, Darren	Anthony, Alex	FAQS Ltd UK	Comedy	2011
<i>Build a Ship, Sail to Sadness</i>	Federlein, Laurin	Federlein, Laurin	Federlein, Laurin	Aronson, Magnus	National Film and Television School Agency	Musical	2007
<i>Bullet Boy</i>	Dibb, Saul	Caleb, Ruth	Dibb, Saul	Walters, Ashley	Shine Entertainment	Drama	2004
<i>Bunker, The</i>	Green, Rob	Figuero, Daniel	Dawson, Clive	Fleming, Jason	Millennium Pictures	Horror	2000
<i>Bunny and the Bull</i>	King, Paul	Burke, Mary	King, Paul	Hogg, Ed	Warp X	Comedy	2009
<i>Burial, The</i>	Boucher, Daniella	Mills, David William	Boucher, Danielle	Boucher, Danielle	Jack & Jill Films	Comedy	2009
<i>Burning Light</i>	Ellegaard, Marc	Ellegaard, Marc	Ellegaard, Marc	Myers, Harry	Y Productions	Drama	2006
<i>Business, The</i>	Love, Nick	Richardson, James	Love, Nick	Dyer, Danny	Vertigo Films	Crime	2005
<i>Butterfly Man</i>	Kea, Kaprice	Waller, Tom	Kea, Kaprice	Laing, Stewart	De Warrenne Pictures	Drama	2002
<i>Butterfly Tattoo, The</i>	Hawkins, Phil	Visser, Rik	Potts, Stephen	Stuart, Duncan	Dynamic Entertainment	Thriller	2008
<i>Bye Bye Miss Goodnight</i>	Kandhari, Karan	Cocker, Adam	Kandhari, Karan	Duby, Neha	Oslo Beach Films	Comedy	2005
<i>Cab Hustle</i>	Futura 3000	Futura 3000	Aneke, Osita	Ojo, Wale	The Film Exchange	Musical	2004
<i>Cal</i>	Martin, Christian	Martin, Christian	Martin, Christian	Brocklebank, Danie	Bonne Idée Productions Ltd UK	Drama	2012
<i>Calais</i>	Teklu, Germai	Teklu, Germai	Teklu, Germai	Hunt, Maurice D	Manotherunproductions Ltd UK	Thriller	2011

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<i>Call of the Hunter</i>	Straeger, Anthony	Kelly, Anthony	Gawtry, Stephen	Paul, Sarah Hastings, Amy Joyce	Quid In Shrapnel Productions	Comedy	2009
<i>Callback Queen, The</i>	Cantwell, Graham	Cantwell, Graham	Cantwell, Graham	Lefevre, Rachele	Film Venture	Comedy	2012
<i>Caller, The</i>	Parkhill, Matthew	Dasmal, Amina	Casci, Sergio	Lefevre, Rachele	Alcove Entertainment	Horror	2011
<i>Calling, The</i>	Dunn, Jan	Wickham, Elaine	Dunn, Jan	Blethyn, Brenda Jones, Mark Lewis	Medb Films	Comedy	2009
<i>Calon Gaeth (aka Small Country)</i>	Way, Ashley	Staniforth, Richard J	Barstow, Stan		Green Bay Media	Romance	2006
<i>Cancer of Corruption, The</i>	Heron, Thomas	Heron, Thomas	Heron, David	Heron, Drew	Muckle Films	Drama	2003
<i>Canning Town Fox</i>	Dale, Samuel	Garcia, Pablo	Dale, Samuel	Dale, Samuel	Lo-Fi Films Limited	Comedy	2004
<i>Capital Punishment</i>	Vitoria, Adrian	O'Leary, Tony	Kendall, Steven	Kavaz, James Alli-Farah, Mohamed	Real People Productions	Crime	2003
<i>Captain Eager and the Mark of Voth</i>	Davison, Simon	Bazzard, Rebecca	Davison, Simon		Imperious Films	Sci-Fi	2007
<i>Car Park</i>	McCoid, Bill	McCoid, Bill	McCoid, Bill	Swift, Stephen	Multi Story Film Company	Thriller	2009
<i>Cargo</i>	Reiss, Andi	Melville, Louis	Jones, Tudor	Williams, Heahcote	Yellow Productions	Drama	2004
<i>Casanova's Last Stand</i>	Murphy, Mark	de Naray, Constantine	Murphy, Mark	Bergin, Patrick	Solar Productions	Drama	2007
<i>Cash and Curry</i>	Bains, Sarjit	Edwards, Christine	Edwards, Christine	Chana, Ameet	Jaffa Entertainment Ltd.	Comedy	2008
<i>Cashback</i>	Ellis, Sean	Bausager, Lene	Ellis, Sean	Biggerstaff, Sean	Ugly Duckling Films	Comedy	2004
<i>Cass</i>	Baird, Jon S	Haller, Stefan	Baird, Jon S	Anozie, Nonso Brannegan, Fabian	Cass Pictures	Crime	2008
<i>Castell De Ferro</i>	Tobbell, Tobias	Mac, Jessie	Tobbell, Tobias	Lubbock-Smith, Nathan	Monkey Mac Productions	Romance	2006
<i>Catalina: A New Kind of Superhero</i>	Barker, Kenneth D	Barker, Kenneth D	Barker, Kenneth D		Water on the Rock Limited	Sci-fi	2009
<i>Caught in the Act</i>	Lipsey, Matt	Lipsey, Matt	Savage, Neil	Speirs, Steve	Carnaby International	Comedy	2008
<i>Chaos and Cadavers</i>	Hilber, Niklaus	Thomas, Nigel	Hilber, Niklaus	Moran, Nick	Matador Pictures	Comedy	2003
<i>Charlie</i>	Needs, Malcolm	Ireland, Tim	Needs, Malcolm	Goss, Luke	Midas Films	Thriller	2004
<i>Charlie Noades R.I.P.</i>	Doyle, Jim	Fitzmaurice, Tony	Fitzmaurice, Neil	Fitzmaurice, Neil McGettigan, Alex	North Star Productions	Comedy	2009
<i>Charlie White</i>	Abrahams, Samuel	Datau, Maya	Abrahams, Samuel		Tabloid Films	Drama	2004
<i>Chemical Wedding</i>	Doyle, Julian	Pupkewitz, David	Dickinson, Bruce	Callow, Simon	Bill & Ben Productions Limited, Focus Films	Horror	2008
<i>Cherps</i>	Lee, Kolton	Lee, Kolton	Lee, Kolton	Dyer, Clint	Prophet Pictures	Comedy	2003
<i>Cherry Tree Lane (aka 44 Alexandra Hall Road)</i>	Williams, Paul Andrew	Marshall, Ken	Williams, Paul Andrew	Blake, Rachael	Steel Mill Pictures	Crime	2010
<i>Cherrybomb</i>	Barros D'sa, Lisa	Huffam, Mark	Carville, Daragh	Grint, Rupert Bisson, Christopher	Generator Entertainment	Drama	2009
<i>Chicken Tikka Masala</i>	Kalirai, Harmage Singh	Tandon, Sanjay	Parekh, Roopesh	Harvey, Vivienne	Seven Spice Productions	Comedy	2004
<i>Childhood</i>	Allen, Ben	Sheppard, Nigel	Sheppard, Nigel		Styx Productions	Drama	2007
<i>Children of the Lake</i>	Lewis, Ian	Lewis, Ian	Lewis, Ian	McKern, Abigail	Farnham Film Company	Action	2009
<i>Children, The (aka The Day)</i>	Shankland, Tom	Niblo, Allan	Williams, Paul Andrew Lamoral-Roberts, Julian	Birchistle, Eve	Vertigo Films	Horror	2008
<i>Chinese Burns</i>	Ronald, Alan	Ronald, Alan		James, Eleanor	Hill Roberts Films Ltd UK	Horror	2012
<i>Christie Malry's Own Double-Entry</i>	Tickell, Paul	Kasander, Kees	Bent, Simon	Moran, Nick	Delux Productions	Drama	2000
<i>Chronoslexia</i>	Isserow, Lee	Fleming, Trevor	Isserow, Lee	Waller, Angie	Opiate of the People Films	Sci-fi	2011
<i>Chunky Monkey</i>	Cruttwell, Greg	Hunt, Phil	Cruttwell, Greg	Threlfall, David Saunders, Laurence	Head Gear Films	Drama	2001
<i>Cincinnati to Cymru</i>	Ellis, Stephen	Thomas, Des	Ellis, Stephen		MicroFilms	Drama	2001
<i>City of Dreamers</i>	Patterson, Jamie	Holman, Nathalie	Patterson, Jamie	Cosgrove, Ellen	Jump Start Productions Ltd UK	Drama	2011
<i>City Rats</i>	Kelly, Steve M	Borthwick, William	Fantauzzo, Simon	Hassan, Tamer	Scanner-Rhodes Productions	Action	2009
<i>City Slacker</i>	Larkin, James	Walde, Jane	Mueller, Machael	Bathurst, Robert	Tornado Films Ltd UK	Romance	2012
<i>Clan, The</i>	Hutcheon, Lee	Hutcheon, Lee	Hutcheon, Lee	Cosmo, James	Clanfilm Productions	Crime	2009
<i>Clean</i>	Assayas, Olivier	Fichman, Niv	Assayas, Olivier	Cheung, Maggie	Rectangle Productions	Drama	2004
<i>Cleaners</i>	Carretta, Al	Carretta, Al	Carretta, Al	Federman, Katy	Nightpiece Media Ltd UK	Crime	2011
<i>Closed Book, A (aka Blind Revenge)</i>	Ruiz, Raoul	Kinninmont, Tom	Adair, Gilbert	Hannah, Darryl	Eyeline Entertainment	Thriller	2010
<i>Closer You Get, The (aka American Women)</i>	Ritchie, Aileen	Pasolini, Uberto	Ivory, William	Hart, Ian Anderson, Gillian	Redwave Films	Comedy	2000
<i>Closure (aka Straightheads)</i>	Reed, Dan	Jones, Damian	Reed, Dan		Free Range Films	Horror	2007
<i>Cloud Cuckoo Land</i>	Dickinson, Matt	Bradley, Chris	Dickinson, Matt	Jacobi, Derek	Airborne Productions	Drama	2004
<i>Club Le Monde</i>	Rumley, Simon	Symonds, Jolyon	Rumley, Simon	Badland, Annette	Screen Production Associates	Comedy	2001
<i>Club, The</i>	Balogun, Tony	Etienne, Treva	Balogun, Tony	Etienna	Logun Media Limited	Thriller	2004
<i>Clubbed</i>	Thompson, Neil	Carr, Martin	Thompson, Geoff	Salmon, Colin	Formosa Films	Crime	2008
<i>Clubbing to Death</i>	Phillips, Lee	Ware, Mat	Phillips, Lee	Moran, Nick	4ground Media	Action	2007
<i>Cocaine Saints</i>	Diapper, Russ	Diapper, Russ	Diapper, Russ	Diapper, Russ	Eagle Eyes Pictures Ltd UK	Crime	2011

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<i>Cochochi</i>	Guzman, Laura Amelia	Cruz, Pablo	Cardenas, Israel	Batista, Antonio Lerma	Alcove Entertainment	Family	2007
<i>Codename: Hide</i>	Lingard, Jim	Greenwood, Ryan	Lingard, Jim	Donohue, Simon	Ninth Circle Films Ltd UK	Drama	2012
<i>Coffee Sex You</i>	Grant, Marcel	Grant, Marcel	Grant, Marcel	Zafar, Caspar	Shipwreck Films	Drama	2008
<i>Coffin, The</i>	Price, Marc	Price, Marc	Price, Marc	Kirton, Alastair	Nowhere Fast Productions Ltd UK	Drama	2010
<i>Cold Earth (aka Dark Secrets)</i>	Falco, Frank	Riera, Ernest	Falco, Frank	Daniels, Gary	Bridgeway Productions	Thriller	2008
<i>Cold Fish</i>	Fairman, David	Fairman, David	Cristie, Graham	Gates, Jon-Paul Sigurdsson, Ingvar Eggert	Opus Pictures	Crime	2000
<i>Cold Light</i>	Oddsson, Hilmar	Frioriksson, Friorik	Oddsson, Hilmar		Film and Music Entertainment	Drama	2004
<i>Cold Living</i>	Dimitropoulos, Nicholas	Don, Cliff	Don, Cliff	Trister, Steven	AR Film Production	Action	2008
<i>Colin</i>	Price, Marc	Price, Marc	Price, Marc	Kirton, Alastair	Nowhere Fast Productions	Horror	2008
<i>Collusion (aka Three Guesses)</i>	Burridge, Richard	Burridge, Richard	Burridge, Richard	Stubbs, Imogen	Thirdwave Films	Drama	2003
<i>Coma Girl: the State of Grace</i>	Jacobsen, Dina	Renee, Lisa	Jacobsen, Dina	Orton, Amanda	Vista Films	Comedy	2005
<i>Come on Eileen</i>	Geraghty, Finola	Geraghty, Finola	Geraghty, Finola	Howe, Jackie	Foal Film Productions Ltd UK	Drama	2010
<i>Comedian, The</i>	Schkolnik, Tom	Falvre, Bertrand	Schkolnik, Tom	Hogg, Edward	The Bureau Ltd UK	Comedy	2011
<i>Comfort the Disturbed, Disturb the Comforted</i>	de Moubray, Arran	de Moubray, Arran	de Moubray, Arran	Craddock, Jack	Code M Productions	Drama	2006
<i>Commando, The</i>	Buck, Timothy	Buck, Timothy	Buck, Timothy	Knowles, Gary	TimBuck2 Productions	Drama	2004
<i>Community (aka Final Project)</i>	Ford, Jason	Bird, Terry	Ford, Jason	Jordan, Elliott	New Town Films Ltd UK	Horror	2012
<i>Complete Map of the Universe (aka E/S/T)</i>	Peterson, Nick	Norwood, Tom	Gaud, Nicolas	Emmanuelle, Jenia	EdgeImageBank	Drama	2007
<i>Complicity (aka Retribution)</i>	Millar, Gavin	Dunn, Neil	Elsley, Bryan	Miller, Jonny Lee	Carlton Films Chana Film & Entertainment Limited, Screen Production Associates	Thriller	2000
<i>Compulsive Behaviour (aka The Case)</i>	Warner, Mark	Jackson, Piers	Warner, Mark	Brahmbhatt, Bob		Drama	2002
<i>Conejo en la luna (aka Rabbit on the Moon)</i>	Ramirez Suarez, Jorge	Cruttwell, Greg	Ramirez Suarez, Jorge	Bichir, Bruno	Beanca Films	Crime	2004
<i>Confetti</i>	Isitt, Debbie	Benson, Ian	Isitt, Debbie	Freeman, Martin	Wasted Talent	Comedy	2005
<i>Conquering Heros</i>	Moffat, Robbie	Harris, Simon	Moffat, Robbie	Baxter, Marmie Bonneville, Hugh	Beast the the Basement Ltd.	Crime	2010
<i>Conspiracy of Silence</i>	Deery, John	Stanley, Davina	Deery, John		Flick Features	Drama	2003
<i>Conundrum, The</i>	Radich, Martin	Horner, Ashley	Radich, Martin	Fox, Trevor Kelham, Christopher	Pinball Films Discovery Films UK Ltd	Drama	2011
<i>Cost of Love, The (aka Dale)</i>	Medland, Carl	Medland, Carl	Medland, Carl			Comedy	2011
<i>Cottage, The</i>	Williams, Paul Andrew	Marshall, Ken	Williams, Paul Andrew	Serkis, Andy Thompson, Scottie	Steel Mill Pictures London Dream Motion Pictures Ltd UK	Horror	2008
<i>Coulda, Woulda, Shoulda</i>	Jhaj, Jacky	Jhaj, Jacky	Jhaj, Jacky			Comedy	2012
<i>Counterfeit Butterfly</i>	Easmon, Marimba	Easmon, Marimba	Easmon, Marimba	Thomas, Maria McMenamin, Ciaran	Ije Films	Thriller	2008
<i>County Kilburn</i>	Hegarty, Elliot	MacIntyre, Magnus	Hegarty, Elliot	Gillespie, Simon Jake	Watermark Films Haggis Western Pictures	Comedy	2000
<i>Cowboy Court, The</i>	Gillespie, Simon Jake	Malley, Tony	Gillespie, Simon Jake			Action	2011
<i>Cowboys and Angels</i>	Gleeson, David	Lichtenthaler, Nathalie	Gleeson, David	Legge, Michael	Wide Eye Films Normal Vibes Productions	Comedy	2003
<i>Cowfusion</i>	Francis, John	Furber, Greg	Francis, John	Arthur, John		Comedy	2006
<i>Crack Willow</i>	Radich, Martin	Hooks, Jane	Radich, Martin	Bennett, Mark	Warp X	Thriller	2008
<i>Credo (aka The Devil's Curse)</i>	Harman, Toni	Dobbin, Michael A	Wakeford, Alex	Buring, Myanna	Alto Films	Horror	2007
<i>Crew, The</i>	Vitoria, Adrian	Brady, Ian	Brady, Ian	Williams, Scot	Syndicate Films	Crime	2008
<i>Cricket</i>	Austin, Daniel	Austin, Chris	Austin, Daniel	Aistrup, Matt Keaveney, Emma	Austin Brothers Films MilesTones Productions Ltd UK	Crime	2010
<i>Crimefighters</i>	Watts, Miles	Watts, Miles	Cathena, Anna			Action	2010
<i>Cross-Eyed Waltz</i>	Hearn, Peter	Hearn, Peter	Hearn, Peter	Bell, David	Kicked by a Mule Productions	Comedy	2005
<i>Crossing Bridges</i>	Norfolk, Mark	Norfolk, Mark	Norfolk, Mark	Rose, Jason	Prussia Lane Productions	Drama	2005
<i>Crying with Laughter</i>	Molotnikov, Justin	Mundell, Claire	Molotnikov, Justin	McCole, Stephen	Synchronicity Films	Thriller	2009
<i>Cuckoo</i>	Bracewell, Richard	Bracewell, Richard	Bracewell, Richard	Fraser, Laura	Punk Cinema Ltd OTT Productions Ltd UK	Thriller	2009
<i>Culled, The (aka The Culling)</i>	Archer, Nick	Archer, Nick	Archer, Nick	Starks, Andy Gurreeboo, Yasmin		Thriller	2011
<i>Cultural Menace</i>	Metto, Erim	Metto, Erim	Stevens, Robbi		Metto Productions	Drama	2004
<i>Cup Cake</i>	McIvor, Colin	Jackson, Katy	Murphy, Christine	Fairley, Michelle	Wee Buns Ltd	Comedy	2010
<i>Curio</i>	Nesbit, Steve	Footit, Benjamin	Nesbit, Steve	Russell, Wayne	Curio Film Productions Ltd UK	Horror	2010
<i>Cut</i>	Williams, Alexander	Dominic Burns	Williams, Alexander	George, River	Hawthorn Productions Ltd UK	Horror	2010
<i>Cut Sleeve Boys</i>	Yeung, Ray	Yeung, Ray	Yeung, Ray	Leow, Chowee	Rice is Nice Productions	Comedy	2006
<i>Cwcv (aka Cuckoo)</i>	Jones, Delyth	Jones, Delyth	Jones, Delyth	Thomas, Eiry	Ffilmiau Fondue Films Ltd.	Drama	2008
<i>Cycle</i>	Moffat, Robbie	Sutherland, Mairi	Moffat, Robbie	Baxter, Marmie	Palm Tree UK	Thriller	2005

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<i>Daddy Issues</i>	Hewitt, Gary	Hewitt, Gary	Hewitt, Gary	Dougal, Lissa	Backgate Productions Ltd UK	Horror	2012
<i>Daddy's Girl</i>	Evans, David	Lloyd, Nerys	Evans, David	Harrington, Richard	Carnaby / Boda	Horror	2006
<i>Daisy Chain, The</i>	Walsh, Aisling	Lynch, Tristan Orpen	MacKenzie, Lauren	Morton, Samantha	Subotica Entertainment	Horror	2008
<i>Dance with Me</i>	Damjanovski, Sasha	Collier, Simon James	Damjanovski, Sasha	Ludman, Ismael	Orev Films	Drama	2009
<i>Dancer Upstairs, The</i>	Malkovich, John	Vincente Gomez, Andres	Shakespeare, Nicholas	Bardem, Javier	Fox Searchlight Pictures	Drama	2002
<i>Dark Corners</i>	Gower, Ray	Ruskin, Morris	Gower, Ray	Birch, Tora	Matador Pictures	Horror	2006
<i>Dark Hunter, The</i>	Cowan, Duncan	Oddball, Johnnie	Jackson, Mark	Jackson, Mark	Digital Guerrilla Filmmakers	Comedy	2003
<i>Dark Journey</i>	White, James	Murray, C. L.	White, James	Mulheron, Tiffany	Hard House Pictures	Fantasy	2009
<i>Dark Nature</i>	de Launay, Marc	de Launay, Marc	Harrison, Eddie	Fulton, Niall G	Mandragora Productions	Horror	2009
<i>Dark Night</i>	Grant, Daniel	Grant, Daniel	Grant, Daniel	Stein, Vaughn	Spiffing Films	Horror	2006
<i>Dark Rage</i>	Akehurst, Lee	Akehurst, Lee	Akehurst, Lee	Dunne, Chris	Media Killer Ltd.	Thriller	2008
<i>Dark Side of Heaven</i>	Moffat, Robbie	Sutherland, Mairi	Moffat, Robbie	Rath, Rachel	Palm Tree UK	Sci-fi	2008
<i>Dark Spirits</i>	Keppler, Huck	Keppler, Huck	Keppler, Huck	Minichova, Milka	Big Pine Holdings	Thriller	2008
<i>Darkest Hour, The</i>	Ellis, John	Holliman, Carrie	Ellis, John	Ford, Jason	Sirius Pictures	Drama	2002
<i>David is Dying</i>	Jackson, Stephen Lloyd	Jackson, Stephen Lloyd	Jackson, Stephen Lloyd	Engele, Lonyo	SAR Production Ltd.	Drama	2011
<i>David is Dying (aka Romeo is Dying)</i>	Jackson, Stephen Lloyd	Mundy-Castle, Andy	Jackson, Stephen Lloyd	Engele, Lonya	SAR Productions Ltd UK	Drama	2011
<i>Day of the Sirens</i>	Brady, Ray	Brady, Deba	Brady, Ray	Mayall, Rick	Imaginary Films	Thriller	2002
<i>Daybreak</i>	Rudden, Bernard	Hickey, Jim	Rudden, Bernard	Allison, Dot	Basilisk Communications	Drama	2000
<i>Daylight Robbery</i>	Leonti, Paris	O'Hagan, Nick	Leonti, Paris	Bell, Geoff	Giant Films	Crime	2008
<i>Dead Babies (aka Mood Swingers)</i>	Marsh, William	Holmes, Richard	Marsh, William	Bettany, Paul	Civilian Content	Comedy	2000
<i>Dead Cat</i>	Georgiou, Stefan	Hilton, Ben	Georgiou, Stefan	McCumisky, Victoria	Dead Cat Films Ltd UK	Romance	2011
<i>Dead Cert</i>	Lawson, Steven	Murray, Billy	Shillito, Ben	Fleming, Jason	Black & Blue Films	Horror	2010
<i>Dead Cool</i>	Cohen, Nick	Cohen, Nick	Cohen, David	Stubbs, Imogen	Psychology News	Comedy	2004
<i>Dead Crazy</i>	Scantori, Frank	Scantori, Frank	Scantori, Frank	Adair, Bonnie	The Film Theatre Company Ltd UK	Horror	2011
<i>Dead Creatures</i>	Parkinson, Andrew	Parkinson, Andrew	Parkinson, Andrew	Ruspoli, Bart	Long Pig Limited	Horror	2001
<i>Dead Dog Blues</i>	Stephenson, Aimee	Jackson, Tim	Stephenson, Aimee	Vernon, Kate	Greenlight Films	Horror	2001
<i>Dead Frequency</i>	Burrows, Rob	Wakefield, Denise	Burrows, Rob	Mason, Stephen	Solarus Films	Drama	2010
<i>Dead in France</i>	McManus, Kris	Levine, Brian Allen	Levine, Brian Allen	Muir, Celia	Delachery Films Ltd UK	Comedy	2012
<i>Dead in the Water (aka Out of Bounds)</i>	Ward, Merlin	Cowan, Michael	Ward, Merlin	Ward, Sophie	Spice Factory	Thriller	2000
<i>Dead Man's Cards</i>	Marquand, James	Marquand, James	McMartin, James	Barber, Paul	Stray Dogs Productions	Western	2006
<i>Dead Man's Shoes</i>	Meadows, Shane	Herbert, Mark	Considine, Paddy	Considine, Paddy	Warp Films	Crime	2004
<i>Dead of the Nite</i>	Evans, S J	Evans, S J	Evans, S J	Tennanat, Cicely	Pillay-Evans Productions Ltd UK	Horror	2012
<i>Dead Outside, The</i>	Mullaney, Kerry Anne	Bird, Kris R	Mullaney, Kerry Anne	Douglas, Sandra Louise	Mothcatcher Films	Horror	2008
<i>Dead Room</i>	Boote, Julian	Askew, Joseph	Boote, Julian	Ofoegbu, Anthony	Seventh Twelfth Collective Ltd.	Comedy	2001
<i>Dead Wood</i>	Bryant, David	Bryant, David	Bryant, David	March, Fergus	Menan Films	Horror	2007
<i>Dead, The</i>	Ford, Howard J	Ford, Howard J	Ford, Howard J	Freeman, Rob	Indelible Pictures Ltd UK	Horror	2010
<i>Deadeye - The True Story of Private Lives</i>	Morledge, Phillip	Morledge, Phillip	Morledge, Phillip	Bozenska, Becca	Zero Productions	Thriller	2004
<i>Deadly Pursuit</i>	Diaper, Russ	Diaper, Russ	Diaper, Russ	Diaper, Russ	Sledge Films	Action	2008
<i>Deadmeat</i>	Manso, Kwabena	Manso, Kwabena	Manso, Kwabena	Laird, Martina	Deadmeat Productions	Crime	2007
<i>Deadpan Valentine</i>	Lindsey, Robin	Lindsey, Robin	Lindsey, Robin	Parsons, Mark	Deadpan Valentine Ltd	Comedy	2006
<i>DeadTime</i>	Jopia, Tony	Took, Dominic	Bishop, Stephen	Saunders, Laurence	Spooked Films	Horror	2010
<i>Death</i>	Gooch, Martin	Gooch, Martin	Gooch, Martin	Freeman, Paul	Gothic Manor Ltd UK	Mystery	2012
<i>Death of a President</i>	Range, Gabriel	Range, Gavriel	Range, Gabriel	Ayoub, Hend	Borough Films	Crime	2006
<i>Death of Klinghoffer, The</i>	Woolcock, Penny	Baptiste, Madonna	Goodman, Alice	Sylvan, Sanford	Blast Films	Musical	2003
<i>Death of Merlin, The (aka Enchantress)</i>	Lewis, Ian	Roffe, Melloney	Lewis, Ian	McKern, Abigail	The Farnham Film Company Ltd UK	Thriller	2011
<i>Deathwatch</i>	Bassett, Michael	Downey, Mike	Bassett, Michael	Bell, Jamie	F&ME	Horror	2002
<i>Debt, The</i>	Jones, Jon	Wilkie, Pier	McBrien, Richard	Clarke, Warren	High Point Film and Television	Crime	2003
<i>Decoy Bride, The</i>	Folkson, Sheree	Bernstein, Robert	Phillips, Sally	Eve, Alice	Ecosse Films	Comedy	2011
<i>Deep Blue Sea, The</i>	Davies, Terence	O'Connor, Sean	Davies, Terence	Weisz, Rachel	Camberwell / Fly Films	Romance	2011
<i>Deep Lies (aka Barefooting)</i>	Stagg, Phil	Law, Cliff	Stagg, Phil	Ward, Ken	Arena-Nova Films	Drama	2006

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<i>Delhi Boom!</i>	Puri, Sameer	Puri, Sameer	Puri, Sameer	Zafar, Ali	GAP2000 Films	Action	2007
<i>Demon</i>	Duffield, Mark	Duffield, Mark	Duffield, Mark	Langford, Clare	Demon House Pictures	Horror	2012
<i>Demon Within, The</i>	Gasnier, Harold	Gasnier, Harold	Gasnier, Harold	Austin, Sophie	24 Carrot Films	Horror	2009
<i>Demons and Doors</i>	Croot, Jason	Croot, Jason	Southouse, Stephen	Kalligas, Nelly	Vermillion Films	Drama	2012
<i>Demons Never Die (aka Suicide Kids)</i>	Rose, Arjun	Maza, Jason	Rose, Arjun	Sheehan, Robert	S.Kids	Horror	2011
<i>Deserter</i>	Huberty, Martin	Burrows, Laura	Weinberg, Julie	Fox, Paul	Simon Films	War	2002
<i>Desire</i>	Jones, Gareth	Howe, Fiona	Jones, Gareth	Pearce, Oscar	Scenario Films Limited	Drama	2009
<i>Desperate Measures</i>	Looker, Stephen	Green, Chris	Green, Chris	Lord, Stephen	Chris Green Productions Ltd UK	Thriller	2011
<i>Destiny</i>	Alagan, Mathi	Ramsamy, Kesva Nanda	Alagan, Mathi	Guyonnet, Julien	M2N Films Ltd	Drama	2006
<i>Districed</i>	Taylor-Wood, Sam	Agace, Mel	Taylor-Wood, Sam	Byrne, Jasmine	Districed Sterling Pictures Ltd UK	Drama	2006
<i>Deviation</i>	Amalou, J K	Greenway, Lara	Amalou, J K	Dyer, Danny	Districed Sterling Pictures Ltd UK	Thriller	2012
<i>Devil's Bridge</i>	Crow, Chris	Lloyd, David	Crow, Chris	Millson, Joseph	Dogs of Annwn	Thriller	2010
<i>Devil's Business, The</i>	Hogan, Sean	Handorf, Jennifer	Hogan, Sean	Clarke, Billy	SHH Films Ltd.	Horror	2011
<i>Devil's Feast, The</i>	Woodward, Sharon	Duriez, Richard	Woodward, Sharon	Coyle, Eloise	Mischief Pictures	Horror	2000
<i>Devil's Gate</i>	St Paul, Stuart	Heard, Jean	Todd, Trevor	Fraser, Laura	Firstupfilm International	Thriller	2003
<i>Devil's Music, The</i>	Sweeney, John	McCarthy, Adrian	Sweeney, John	David, Jennifer Hopkins, Victoria	Beyond the Line	Drama	2001
<i>Devil's Music, The</i>	Higgins, Pat	Higgins, Pippa	Higgins, Pippa	Hopkins, Victoria	Jinx Media Ltd.	Horror	2008
<i>Devil's Playground</i>	McQueen, Mark	Hutton-Mills, Freddie	Ruspoli, Bart	Murray, Jaime	Intandem Films	Action	2010
<i>Devil's Tattoo, The (aka Ghost Rig)</i>	Kean, Julian	Clapperton, Graeme Tchoubouroff, Michael	Kean, Julian	Peace, Heather	KCD Films Limited	Horror	2003
<i>Diagnosis: Superstar</i>	Tchoubouroff, Michael	Clapperton, Graeme Tchoubouroff, Michael	Tchoubouroff, Michael	Alderson, Giles	Weeble Films	Comedy	2008
<i>Diamond Ice'd</i>	Brown, Alan	Brown, Alan	Alan Brown	Harrison, James	Krown Films Ltd UK	Drama	2009
<i>Diana Clone, The</i>	Cheeroth, Sajeev	Langston, Helen	Cheeroth, Sajeev	Cheeroth, Sajeev	Red Buddha Films Ltd UK	Crime	2011
<i>Diary of a Bad Lad</i>	Booth, Michael	Williams, Jonathan	Williams, Jonathan	O'Byrne, Joe	Pleased Sheep Productions	Comedy	2009
<i>Dimensions: A Line, A Loop, A Tangle of Threads</i>	U'Ren, Sloane	Neely, Antony	Neely, Antony	Carson, Hannah	Sculptures of Dazzling Complexity	Drama	2011
<i>Dinner Party, The</i>	Wall, Si	Evans, Rebecca-Clare	Wall, Si	Sidonie, Emily	SEW 'n' sew Films	Drama	2010
<i>Dirty Sanchez: The Movie</i>	Hickey, Jim	Preston, Rupert		Dainton, Lee	Vertigo Films	Comedy	2006
<i>Disappeared, The</i>	Kevorkian, Johnny	Murphy, Neil	Kevorkian, Johnny	Robertson, Finlay	Lost Tribe Productions	Horror	2008
<i>Disciple, The</i>	Charles, Rodney	Charles, Rodney	Rodney, Charles	Owen Race	The Disciple Productions LLC	Drama	2008
<i>Displaced</i>	Holland, Martin	Tolkington, Andy	Holland, Martin	Strange, Mark	Skylandian Pictures Limited	Sci-fi	2006
<i>Ditching</i>	Hackett, Stephen	Factotum	Factotum	Roddy, Llor	Factotum Ltd UK	Fantasy	2009
<i>Do Elephants Pray?</i>	Hills, Paul	Hill, Paul	Hurn, Jonnie	Hurn, Jonnie	Elephant Features Ltd.	Drama	2010
<i>Do I Love You?</i>	Gornick, Lisa	Gornick, Lisa	Gornick, Lisa	Posner, Ruth	Vallant Doll	Comedy	2002
<i>Do Not Go Gentle (aka Oed Yr Addewid)</i>	Williams, Emlyn	Jones, Alun Ffred	Williams, Emlyn	Berry, Caroline	Ffilmiau'r Nant	Drama	2001
<i>Dog Eat Dog</i>	Shoabi, Moody	Davis, Amanda	Shoabi, Moody	Tonderai, Mark	FilmFour	Comedy	2001
<i>Dog Soldiers</i>	Marshall, Neil	Allen, David E	Marshall, Neil	Pertwee, Sean	The Noel Gay Motion Picture Company	Horror	2002
<i>Dogging: A Love Story (aka Public Sex)</i>	Ellis, Simon	Niblo, Allan	Groom, Michael	Treadaway, Luke	Vertigo Films	Comedy	2009
<i>Doghouse</i>	West, Jake	Loveday, Mike	Schaffer, Dan	Dyer, Danny	Carnaby Film Productions	Comedy	2009
<i>Dolphins</i>	Jay, Mark	North, Stephen	Jay, Mark	Davies, Karl	Full on Film	Action	2007
<i>Don't Call Back</i>	Nicholson, Christopher	Hill, Jonathan D	Nicholson, Christopher	Oliver, Travis	Youthink Pictures Ltd UK	Comedy	2010
<i>Don't Let Him In (aka The Hollow)</i>	Smith, Kelly	Smith, Kelly	Smith, Kelly	Linfield, Sophie	Straightwire Films Ltd UK	Horror	2011
<i>Don't Look at Me (I'm Ugly in the Morning)</i>	Purnell, Chris	Purnell, Chris	Purnell, Chris	Byrne, Ed	Orphanage Films	Drama	2008
<i>Don't Look Back!</i>	Sherard, Nick	Sherard, Nick	Sherard, Nick	Tobias, Oliver	New Forest Pictures	Thriller	2003
<i>Don't push your Granny while she's shaving</i>	Parker, James P	Jhazbhal, Kudayja	Parker, James P.	Mzobe, Siph	Free Range Productions	Drama	2001
<i>Don't Stop Dreaming</i>	Kapoor, Aditya Raj	Ahmad, Munir	Nazir, Azjad	Kapoor, Rishi	Stereo Nation Pictures	Comedy	2007
<i>Don't Worry About Me</i>	Morrissey, David	Maxwell, John	Morrissey, David	Eve, Beverley	Tubedale Films	Drama	2009
<i>Donkey (aka Kenjac)</i>	Nuic, Antonio	Matic, Boris T	Nuic, Antonio	Glogovac, Nebojsa	Film and Music Entertainment	Drama	2009
<i>Donkey Punch</i>	Blackburn, Oliver	Lamont, Angus	Bloom, David	Winstone, Jaime	Warp X	Thriller	2008
<i>Donkeys</i>	McKinnon, Morag	Berrie, Gillian	Scherfig, Lone	Dickie, Kate	Advanced Party Film	Comedy	2010
<i>Donovan Quick</i>	Blair, David	Austen, Sue	Franceschild, Donna	Firth, Colin	Making Waves Film and Television Limited	Drama	2000
<i>Donovan Slacks</i>	Bowling, Kivmars	Bowling, Kivmars	Bowling, Kivmars	Penrose, Ashley	Dog Animal Films	Drama	2007

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<i>Dora (aka D'ora)</i>	Antal, Delia	Antal, Delia	Antal, Delia	Antal, Delia	28 Films Ltd UK	Drama	2012
<i>Dot the I (aka El punto sobre la I)</i>	Parkhill, Matthew	Duffield, George	Parkhill, Matthew	Barcia Bernal, Gael	Arcane Pictures	Drama	2003
<i>Double Top</i>	Bolton, Christopher	Williams, Mark	Bolton, Chris	Tempest, Sarah	Double Down Flicks Ltd UK	Drama	2012
<i>Down Terrace</i>	Wheatley, Ben	Starke, Andrew	Hill, Robin	Hill, Robin	Baby Cow Productions	Comedy	2009
<i>Draining Lizards</i>	Sunderland, Matthew	Hunt, Sue	Nimmo, Richard	Anderson, Charles David	Sunipa Pictures	Comedy	2002
<i>Dreaming Lhasa</i>	Sarin, Ritu	Thomas, Jeremy	Sonam, Tenzing	Kalsang, Jampa	White Crane Films	Adventure	2005
<i>Dreamscape</i>	Fox, Daniel J	Ellingham, Mark	Fox, Daniel J	Rodriguez, Magda	Chat Noir Productions	Sci-Fi	2008
<i>Dressing Granite</i>	Scott, Bill	Hardman, Laura	Sheppard, Pauline	Shaw, David	Bedrock Films	Drama	2007
<i>Drowning Room Only</i>	Collins, Katharine	Birmingham, Andy	Collins, Katharine	Chaneac, Delphine	Wild Frontier productions Ltd.	Thriller	2012
<i>Drummond Will, The</i>	Butterworth, Alan	Tobbell, Tobias	Butterworth, Alan	Oosterveen, Mark	Knee Jerk Films Ltd UK	Comedy	2010
<i>Dubplate Drama</i>	Hyams, Luke	Figgis, Louis	Hyams, Luke	Mnene, Charles	Trilogy Productions Ltd UK	Drama	2009
<i>Dummy</i>	Thompson, Matthew	Robinson, Maranda	Muller, Michael	Johnson, Aaron	Format Films Ltd.	Drama	2008
<i>Dungeon Moor Killings, The</i>	Hickey, Jim	Hickey, Jonathan	Hickey, Jonathan	Paul, Gavin	Fredonia Films	Horror	2009
<i>Duplicity</i>	Cornish, Jack	Cornish, Jack	Cornish, Jack	Mitchelson, Tom	Galleon Films	Crime	2004
<i>Dust</i>	Mason, Adam	Mason, Adam	Mason, Adam	Rudolf, Gerard	The Paranoid Celluloid Co. Ltd.	Horror	2001
<i>Dying Breed, A</i>	Collins, Katharine	Collins, Katharine	Collins, Katharine	Wheatley, James Oliver	Wild Frontier Productions	Thriller	2007
<i>Ealing Comedy</i>	Raschid, Neville	Raschid, Sagarika	Croker, Jon	Ghir, Kulvinder	Ealing Comedy Limited	Comedy	2008
<i>East Midlands Babylon</i>	Ball, Graham	Kitchen, John	Ball, Graham	Penny, Brett	S-I-A Films	Drama	2006
<i>Easy Virtue</i>	Elliott, Stephan	Abrams, Joseph	Elliott, Stephan	Biel, Jessica	Ealing Studios	Comedy	2008
<i>Eating Cake</i>	Ellis, Stephen	Ellis, Stephen	Carr, Alan	Carr, Alan	Microfilm Productions	Drama	2003
<i>Ebony Road</i>	Fry, Maia Krall	Rashid, Masarat	Fry, Maia Krall	Garcia, Daniel	Ebony Road Productions	Drama	2011
<i>Ecology</i>	Turner, Sarah	Turner, Sarah	Turner, Sarah	Jay, Caroline	Sarah Turner	Drama	2007
<i>Eden Lake</i>	Watkins, James	Colson, Christian	Watkins, James	Reilly, Kelly	Rollercoaster Films	Horror	2008
<i>Edge</i>	Morley, Carol	Cannon, Cairo	Morley, Carol	Peake, Macine	Cannon and Morley Productions	Drama	2010
<i>Edward and Lulu</i>	Celebidachi, Serge	Hook, Bryan	James, Celi	Olivier, James	Celi Films Ltd.	Drama	2004
<i>Egression</i>	Brady, Ray	Brady, Ray	Brady, Ray	Brady, Ray	Imaginary Films 2000	Drama	2010
<i>Eight Minutes Idle</i>	Hewis, Mark Simon	Moll, Chris	Blincoe, Nicholas	Thomas, Antonia	ArthurCox Ltd.	Comedy	2012
<i>Electric Man</i>	Barras, David	Jackson, Ellen Raissa	Mackay, Scott	Manly, Toby	Dugbus Ltd UK	Comedy	2012
<i>Elemental Storage</i>	Dixon, Matthew	Woods, David	Dixon, Matthew	Regan, Alix Wilton	Original Standard Picture Production	Drama	2009
<i>Elevator Gods</i>	Hunt, Peter	Hunt, Peter	Hunt, Peter	Brown, Ralph	Happyourfilms Ltd UK	Comedy	2012
<i>Eleven Men Out</i>	Douglas, Robert	Kemp, Julius	Douglas, Robert	Haraldsson, Bjorn Hlynur	The Icelandic Filmcompany	Comedy	2005
<i>Eliminate Archie Cookson</i>	Holder, Rob	Karavella, Ioanna	Holder, Rob	Rhys, Paul	Agent Pictures Ltd.	Comedy	2011
<i>Elvis Pelvis</i>	Aduaka, Kevin	Aduaka, Kevin	Aduaka, Kevin	Pearse, Kadeem	Love Streams Agnes B Productions	Drama	2007
<i>EMR</i>	Erskine, James	Lentaigne, John	Erskine, James	Leese, Adam	Cottonopolis Films	Thriller	2004
<i>Emulsion</i>	Singh, Suki	Merrifield, Adam	Singh, Suki	Heughan, Sam	White Lantern Film Ltd UK	Thriller	2011
<i>Encounters</i>	Kelman, Pat	Reason, Jonty	Kelman, Pat	Kershaw, David	Pittot Films	Romance	2005
<i>Endgame</i>	Wicks, Gary	Jones, Gary	Wicks, Gary	Newman, Daniel	Various Films	Drama	2001
<i>Engagement, The</i>	Duigan, John	Le Terriere, Peter	Duigan, John	Glaser, Ty	First Foot Films Ltd.	Drama	2004
<i>Englishman, The</i>	Sellar, Ian	Mulqueen, Teresa	Grant, Brendan	Topic, Velibor	Mechanical Films	Drama	2007
<i>Entity</i>	Stone, Steve	Stone, Steve	Stone, Steve	Kirwan, Dervla	South Yorkshire Filmmaker's Network UK	Horror	2012
<i>Entwinement</i>	Burrows, Rob	Edwards, Natalie	Burrows, Rob	Ormston, Amy	Solarus Films	Drama	2012
<i>Escapist, The</i>	MacKinnon, Gillies	Symonds, Jolyon	Perry, Nick	Miller, Jonny Lee	Jolyon Symonds Productions Limited	Thriller	2002
<i>Escapist, The</i>	Wyatt, Rupert	Sturges, Adrian	Wyatt, Rupert	Cox, Brian	Parallel Films	Thriller	2008
<i>Eschatrilogy</i>	Morter, Damian	Morter, Nicola	Morter, Damian	Wellard, Dan	Safehouse Pictures Ltd UK	Horror	2012
<i>Essex Boys</i>	Winsor, Terry	Pope, Jeff	Pope, Jeff	Bean, Sean	Granada Film Productions	Crime	2000
<i>Evan's Baby (aka Se1: Evan's Baby)</i>	Callender, Devron	Lowe, Peter	Lowe, Peter	Bankinson, Ty	Menace Films Ltd UK	Drama	2012
<i>Evans Baby (aka Se1: Evan's Baby)</i>	Callender, Devron	Callender, Devron	Lowe, Peter	Bankinson, Ty	Menace Films and Entertainment	Drama	2012
<i>Eve</i>	Davies, Jack	Davies, Jack	Davies, Jack	Winstone, Jamie	Lunchtime Films	Action	2009
<i>Every Picture</i>	Tobbell, Tobias	Arnold, Keith	Greenway, Lara	Hancock, Jenny	Tobbell Films	Thriller	2005
<i>Everything</i>	Hawkins, Richard	Potterton, Oliver	Hawkins, Richard	Winstone, Ray	Shropshire	Drama	2004

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<i>Everything to Dance For</i>	Howie, Pearl	Howie, Pearl	Howie, Pearl	Jackson, Sasha	Flying Machine Films	Drama	2007
<i>Everywhere and Nowhere</i>	Huda, Menhaj	Tromans, Sam	Huda, Menhaj	Floyd, James	Foton Films Limited	Drama	2011
<i>Evil Aliens</i>	West, Jake	Dennison, Tim	West, Jake	Booth, Emily	Falcon Media	Sci-Fi	2005
<i>Evil Calls: The Raven (aka Alone in the Dark)</i>	Driscoll, Richard	Driscoll, Richard	Driscoll, Richard	Driscoll, Richard	House of Fear	Horror	2008
<i>Ex Cathedra</i>	Wright, Liam Andrew	Petela, Vicky	Wright, Liam Andrew	Amies, Gabrielle	Firefly Independent Films	Drama	2009
<i>Exam</i>	Hazeldine, Stuart	Hazeldine, Stuart	Hazeldine, Stuart	Salmon, Colin	Bedlam Productions	Thriller	2009
<i>Exhibit A (aka Home Movie)</i>	Rotheroe, Dom	Bender, Darren	Rotheroe, Dom	Cole, Bradley	Bent Films Ltd	Thriller	2007
<i>Experiment</i>	Turner, Daniel	Deacon, Clare	Turner, Daniel	French, Georgina	Magician Pictures	Thriller	2005
<i>Expiry Date</i>	Bird, Karen	Parker, Louise	Bird, Karen	Edwards, Gaz	Trevor Hall	Horror	2005
<i>Extraordinary Rendition</i>	Threapleton, Jim	Noble, Andrew	Threapleton, Jim	Serkis, Andy	Ultrafilm	Drama	2007
<i>F</i>	Roberts, Johannes	Blacknell, Paul	Roberts, Johannes	Schofield, David	Gatlin Pictures	Horror	2010
<i>Face at the Window</i>	Harper, Graeme	Ward, Josephine	Harper, Graeme	Andreou, Angelo	High Point Film and Television	Drama	2004
<i>Faintheart</i>	Rocco, Vito	Niblo, Allan	Lemon, David	Marsan, Eddie	Vertigo Films	Comedy	2008
<i>Fakers</i>	Janes, Richard	Janes, Richard	Gerstenberger, Paul	Malik, Art	Kleparski & Bee Productions	Comedy	2004
<i>Fall of the Louse of Usher, The</i>	Russell, Ken	de Neef, Ronald	Russell, Ken	Johnston, James	High Point Film and Television	Horror	2002
<i>Fallen Angels</i>	Diaz, Ian David	Boote, Julian	Boote, Julian	Eliot, Esmé	Avrio Filmworks	Horror	2002
<i>Fallen Dreams</i>	Samray, Daniel	Samray, Daniel	Samray, Daniel	Beed, Coral	Fallen Dreams Ltd.	Action	2001
<i>Fallow Field, The</i>	Dovey, Leigh	Arnold, Colin	Dovey, Leigh	Dacre, Michael	Figment TV Productions	Horror	2009
<i>Fast Romance</i>	Ferguson, Carter	Verlaque, Amanda	McCreadie, James	Freer, Jo	Ickleflix Productions	Comedy	2011
<i>Fated</i>	Scott, Nicola	Scott, Joe	Scott, Nicola	MaKay, Brendan	Ace Film	Romance	2005
<i>Fathers of Girls</i>	Howman, Karl	Pacalioglu, Riza Nur	Howman, Karl	Winstone, Ray	FOG Films	Drama	2009
<i>Fatigue</i>	Barnes, Michael Blackwood	Faiers, Mark	Barnes, Michael Blackwood	Faiers, Mark	Fatigue Films	Crime	2003
<i>Feedback</i>	Atkins, Chris	Auty, Charles	Atkins, Chris	Lovett, Norman	S2S Productions	Drama	2004
<i>Feral Generation, The</i>	Jones, Andrew	Panthaki, Ray	Jones, Andrew	Kinsella, Brooke	Urban Way Productions	Drama	2007
<i>Ferryman, The</i>	Graham, Chris	Fletcher, Richard	Ward, Nick	Rhys-Davies, John	Atlantic Film Productions	Fantasy	2007
<i>Festival</i>	Griffin, Annie	Young, Christopher	Griffin, Annie	Bulmore, Ameia	FilmFour	Comedy	2005
<i>Field Trip, The</i>	Coyle, Patrick	Barber, Darren	Coyle, Patrick	Coyle, Patrick	Raw Vision Films Ltd UK	Comedy	2010
<i>Fight Night</i>	Morgan, Chris	Morgan, Chris	Morgan, Chris	Haynes, Tim	Bloody Scary Films	Action	2011
<i>Fighter's Ballad, The</i>	Ukpo, Tony Sebastian	Frisby, Jane	Cadwell, Peter	Cadwell, Peter	Yellow Dolphin Films	Drama	2010
<i>File 25</i>	Baldwin-Smith, Luke	Anderson, Tom	Baldwin-Smith, Luke	Acanfora, Joseph	Oomph Productions	Crime	2010
<i>Film With No Name, The</i>	Race, Ben	Race, Ben	Race, Ben	Fedoro, Olegar	Capture Films Ltd UK	Western	2011
<i>Film-Maker's Son, The</i>	Gavigan, Bart	Gavigan, Bart	Gavigan, Bart	Gavigan, Gabriel	Triptych Productions Ltd UK	Crime	2012
<i>Filth and Wisdom</i>	Madonna	Doring, Nicola	Cadan, Dan	Hutz, Eugene	Semtex Film	Comedy	2008
<i>Final Curtain, The</i>	Harkins, Patrick	Young, Christopher	Hodge, John	O'Toole, Peter	Young Films	Drama	2002
<i>Finding Bob McArthur</i>	Hickey, Jim	Mitchell, Robin	Hickey, Jim	Edwards, Bob	Cadies Productions Ltd.	Drama	2007
<i>Finding Fortune</i>	Moffat, Robbie	Sutherland, Mairi	Moffat, Robbie	D'Elia, Ilaria	Palm Tree UK	Drama	2003
<i>Finding their Feet (aka Way to Dance, The)</i>	Daniels, Matthew B. P.	Staniforth, Richard	Daniels, Matthew B. P.	Polland, Hannah	This Can Motion Pictures	Comedy	2009
<i>Fingers in the Water</i>	Moffat, Robbie	Moffat, Robbie	Moffat, Robbie	Long, Lisa Marie	Moffat Sutherland Pictures	Comedy	2011
<i>Firm, The</i>	Love, Nick	Niblo, Allan	Ashton, Al	Anderson, Paul Fassbender, Michael	Vertigo Films	Drama	2009
<i>Fish Tank</i>	Arnold, Andrea	Kasander, Kees	Arnold, Andrea	Anderson, Paul Fassbender, Michael	Kasander Limited	Drama	2009
<i>Fist of Justice (aka Mersey Cop)</i>	Routledge, Matt	Routledge, Matt	Routledge, Matt	Routledge, Matt	Worldwide Film Entertainment	Comedy	2004
<i>Fit</i>	Blair, Rikki Beadle	Blair, Rikki Beadle	Blair, Rikki Beadle	Blair, Rikki Beadle	Team Angelica Ltd UK	Drama	2010
<i>Flamingo Blues</i>	Stevens, Robbi	Chadwick, Matthew	Stevens, Robbi	Happisburgh, Emmy	Metto Productions	Thriller	2004
<i>Flick</i>	Howard, David	Hall, Rik	Howard, David	O'Connor, Hugh	Monster Films Limited	Horror	2008
<i>Flip a Coin</i>	Flamholz, David	Flamholz, Leon	Papperskorgen, Tom	Eliot, Staten	Caravan Film	Comedy	2004
<i>Flirting Club, The</i>	Jovy, Alex	Bedford, James	Jovy, Alexander	Alderton, Terry	FlirtingClubFilms	Comedy	2010
<i>Flummox</i>	Bell, Sam Mason	Haque, Riyadh	Bell, Sam Mason	Barrington-Jones, Ryan	Trashart Cinema	Action	2008
<i>Fly Trap</i>	Baker, Joseph	Brown, Elizabeth	Large, Tom	Baker, Joseph Baxendale, Helen	Big View Productions	Crime	2010
<i>Flyfishing</i>	Williams, David Klimkiewicz, Katarzyna	Williams, David	Barnhill, Paul	Williams, David Klimkiewicz, Katarzyna	Shooting Pictures	Comedy	2002
<i>Flying Blind</i>		Sterling, Alison	Harrington, Caroline	McCrary, Helen	Ignition Films	Drama	2012

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<i>Folie a Deux</i>	Martin, Sean	Bennett, Andre	Martin, Sean	Dunne, Christopher	891 Filmhouse	Drama	2012
<i>Following Yago</i>	Cooper, Adam	Rouse, Karen	Rouse, Karen	Little, Mark	Infactuation Productions	Romance	2004
<i>Football Factory, The</i>	Love, Nick	Niblo, Allan	Love, Nick	Dyer, Danny	Vertigo Films	Crime	2004
<i>Forest of the Damned (aka Demonic)</i>	Roberts, Johannes	Ruz, Miquel	Roberts, Johannes	Savini, Tom	Garlin Pictures	Horror	2005
<i>Forest of the Damned 2 (aka Demonic 2)</i>	Riera, Ernest	Evans, Mark	Riera, Ernest	Fowler, Francesca	Lonely Crow Productions Ltd UK	Horror	2011
<i>Forget Me Not</i>	Holt, Alexander	Long, Rebecca	Underwood, Mark	Menzies, Tobias	Quicksilver Films	Romance	2009
<i>Forget Paris</i>	Presswell, Chris	Presswell, Chris	Presswell, Chris	Coleman, Ed	Paper Sun Films	Romance	2011
<i>Fossil</i>	Walker, Alex	Walker, Alex	Walker, Alex	Sackville, John	Brickwall Films Ltd UK	Thriller	2012
<i>Four</i>	Langridge, John	Mirza, Raiomond	Chronnell, Paul	Pertwee, Sean	Oh My! Productions Ltd UK	Drama	2010
<i>Four Eyes</i>	Finnigan, Duncan	Finnigan, Duncan	Finnigan, Duncan	Finnigan, Duncan	Finscotland Productions	Comedy	2003
<i>Fragments</i>	Nickson, Ross	Nickson, Ross	Nickson, Ross	Harding, Stacey	Dubious Films	Action	2008
<i>Framed</i>	Kirby, Jon	Manson, Crispin	Strandling, Matthew	Sumner, Kathryn	Cat's Paw Productions	Thriller	2008
<i>Framework</i>	Mckenna, Sean	Bramley, Roxana	McKenna, Sean	Chomiak, Michael	Nineteen in Paris	Sci-fi	2009
<i>Framing Frankie</i>	Allen, Ben	Allen, Ben	Allen, Ben	Christina, Anoucia	Styx Productions	Comedy	2005
<i>Frank</i>	Heslop, Richard	Shotton, Philip	Heslop, Richard	Beaumont, Darren	I Like Films Me Ltd UK	Drama	2012
<i>Frank (aka Frank: Diary of an Assassin)</i>	Jaggi, Steve	Ryman, Michael	Jaggi, Steve	Powell, James	Frank Pictures Limited	Action	2006
<i>Frankenstein X</i>	Eshire, Paul	Ray, Jennifer	Eshire, Paul	Dailey, Charlotte	Redemption Films	Horror	2003
<i>Freak Out</i>	James, Christian	James, Christian	Palmer, Dan	Heathcote, James	Beyond Therapy Entertainment	Comedy	2004
<i>Free Spirits</i>	Knott, Oliver	Knott, Oliver	Knott, Oliver	Herbert, Leon	Big H Productions	Drama	2000
<i>Freebird</i>	Ivay, Jon	Bohling, Adam	Ivay, Jon	Daniels, Phil	Freedom Pictures	Comedy	2008
<i>Freedom Dance</i>	Brown, Alan	Brown, Alan	Brown, Alan	Vanellis, Julia	Krown Films	Drama	2008
<i>Freestyle</i>	Lee, Kolton	Daniel, Lincia	Maynard, Michael	Konadu, Lucy	B19 Media	Romance	2010
<i>Freeze Frame</i>	Simpson, John	Casey, Michael	Simpson, John	Evans, Lee	Parallel World Productions	Thriller	2004
<i>French Film</i>	Oudney, Jackie	Ethan, Arvind	Ditta, Aschlin	Bonneville, Hugh	Slingshot Studios	Comedy	2008
<i>Frontier Blues</i>	Jalali, Babak	Assadian, Homayoun	Jalali, Babak	Dordi, Khajeh Araz	Caspian Films	Drama	2009
<i>Frozen</i>	McKoen, Juliet	Lavender, Mark	McKoen, Juliet	Seth, Roshan	Rough Sea Productions	Thriller	2004
<i>Full Firearms</i>	Wardill, Emily	Kidner, Dan	Wardill, Emily	Schaub-Abkarian, Catherine	City Projects Ltd UK	Drama	2011
<i>Furor: Rage of the Innocent</i>	Marke, Vic	Marke, Vic	Marke, Vic	Phython, Zara	NB Pictures	Action	2007
<i>Game Keepers without Game</i>	Wardill, Emily	Dingle, Tom	Wardill, Emily	Wilson, Chloe	Tom Dingle	Drama	2009
<i>GamerZ</i>	Fraser, Robbie	Gavin, Paul	Fraser, Robbie	Finbow, Ross	Pure Magic Films	Comedy	2005
<i>Gangster Kittens</i>	Mahmood, Naeem	Madmood, Naeem	Madmood, Naeem	Glover, Julian	Transient Film Exchange	Drama	2011
<i>Gatekeeper, The</i>	Ripley, Darren	Ripley, Darren	Ripley, Darren	Kelly, Craig	Two Bit Films Ltd UK	Horror	2008
<i>Geography of the Hapless Heart</i>	Li, Rain	Asmar, Omar	Billington, Alexandra	Wright, Bonnie	Saetre Film	Drama	2012
<i>Get Cash (aka Get Ca\$h)</i>	Croot, Jason	Southouse, Stephen	Southouse, Stephen	Croot, Jason	Zelica Films Ltd.	Comedy	2011
<i>Ghost of Mae Nak</i>	Duffield, Mark	Waller, Tom	Duffield, Mark	Pacharawirapong, Pataratida	De Warrenne Pictures	Drama	2005
<i>Ghosted (aka Ghost)</i>	Vivelross, Craig	Bryan, Rupert	Civelross, Craig	Lynch, John	Motion Picture House	Drama	2011
<i>Ghosts</i>	Broomfield, Nick	Broomfield, Nick	Broomfield, Nick	Lin, Ai Qin	Lafayette Films	Drama	2006
<i>Gigolos, The</i>	Bracewell, Richard	Bracewell, Richard	Tarter, Sacha	Tarter, Sacha	Punk Cinema Ltd	Comedy	2006
<i>Girl</i>	Astbury, Jake	Astbury, Jake	Astbury, Jake	Mitchell, Helena	Astbury Film Productions	Sci-fi	2009
<i>Give and Take, and Take</i>	Grewal, Jaspreet Singh	Grewal, Jaspreet Singh	Grewal, Jaspreet Singh	Bird, Tom	Troubled Children Films Limited	Drama	2003
<i>Gladiator</i>	Grant, Brian	Jones, Damian	Whitby, Nick	Allen, Fiona	Mission Pictures	Comedy	2004
<i>Glamour Dolls</i>	de Luca, John	Alvarado, Lorena	de Luca, John	de Luca, John	First Round Films Ltd UK	Comedy	2012
<i>Glass Man, The</i>	Solimeno, Cristian	Melhuish, Bruce	Solimeno, Cristian	Nyman, Andy	Tigermoth Motion Pictures	Thriller	2011
<i>Gnaw</i>	Mandry, Gregory	Weston, Rob	Bell, Michael	Bleetsman, Hiram	Jinga Films	Horror	2008
<i>Goat's Tail, A</i>	Amedume, Julius	Amedume, Julius	Amedume, Julius	Nortey, Godfred	Amedume Films	Drama	2006
<i>Gobsnacked!</i>	Kern, Gabriel	Tong, Peter	Tong, Peter	Flint, Beryl	PeterPix Productions	Comedy	2003
<i>Godard & Others</i>	Bliss, Barry	McGann, Clare	Bliss, Barry	Bliss, William	New Troy Productions Ltd UK	Comedy	2010
<i>Godforsaken</i>	Dehlavi, Jamil	Dehlavi, Jamil	Dehlavi, Jamil	Wright, Annabel	Dehlavi Films	Thriller	2010
<i>Golden Brown</i>	Sheehan, Sharon	Sheehan, Sharon	Sheehan, Sharon	Agutter, Jenny	Twilight Films	Drama	2011
<i>Goldfish Memoirs</i>	Cohen, Cas Beau	Wood, Philip	Cohen, Cas Beau	Martello-White, Nathaniel	2nd Century Cinema Limited	Drama	2003

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<i>Gone (aka Middle of Nowhere)</i>	Ledwidge, Ringan	Balderstone, Deborah	Watkins, James	Evans, Shaun	Working Title Pictures	Thriller	2007
<i>Good Arrows</i>	Welsh, Irvine	Welsh, Irvine	Cavanagh, Dean	Brand, Katy	Dust Films Limited	Comedy	2009
<i>Good Dick</i>	Palka, Marianna	Dubin, Jennifer	Palka, Marianna	Palka, Marianna	Good Dick	Comedy	2008
<i>Goodbye Charlie Bright</i>	Love, Nick	Bryer, Lisa	Love, Nick	Nicholls, Paul	Bonaparte Films	Drama	2001
<i>Goodnight Until Tomorrow</i>	Ache, Sunny	Antony, Stuart	Antony, Stuart	Antony, Stuart	Nite Nite Productions	Comedy	2009
<i>Gordon Bennett</i>	Brinkhurst, Timothy	Zajac, Mathew	Brinkhurst, Timothy	Zajac, Mathew	BZ Productions	Comedy	2003
<i>Got to Run</i>	Moffat, Robbie	Moffat, Robbie	Moffat, Robbie	Kendall, Suzanne	Palm Tree Productions	Comedy	2011
<i>Gozo</i>	Bowen, Miranda	Scholfield, Henry	Shell, Steve	Lovibond, Ophella	Bishop Films Ltd UK	Thriller	2012
<i>Gracie</i>	Foster, Jane Alexander	Foster, Jane Alexander	Foster, Jane Alexander	Strauss, Lexi	23 Films Limited	Fantasy	2011
<i>Graders</i>	Hutchison, David	Hutchison, David	Hutchison, David	de Vigne, Janet	Eyedoll Productions	Comedy	2011
<i>Grand Theft Parsons</i>	Caffrey, David	Mannion, Frank	Drysdale, Jeremy	Macht, Gabriel	Swipe Films	Comedy	2003
<i>Graveyard of Death, The</i>	Ash, Jonathon	Days, Tim	Note, Bob	Czekaj, Bartkek	Digital Nasties	Horror	2005
<i>Great Ecstasy of Robert Carmichael, The</i>	Clay, Thomas	Lang, Joseph	Clay, Thomas	Dyer, Danny	Boudu Film	Horror	2005
<i>Greek Pete</i>	Haigh, Andrew	Haigh, Andrew	Haigh, Andrew	Pittaros, Peter	Elmbourne Films Limited	Drama	2009
<i>Greenwich Village Massacre, The</i>	Fellows, Ben	Fellows, Julia	Fellows, Ben	Blignaut, Tim	Ben Fellows Productions Ltd UK	Drama	2010
<i>Greetings</i>	Colley, Kenneth	Colley, Kenneth	Colley, Kenneth	Colley, Kenneth	8 Range Road Productions	Horror	2007
<i>Grey</i>	Murphy, Joseph	Lynch, Patrick	Murphy, Joseph	O'Gorman, Joseph	Red 11 Productions	Romance	2004
<i>Griffin</i>	Jones, Mark	Jones, Mark	Jones, Mark	Ellison, Chris	TaffKirk Films	Comedy	2004
<i>Grind, The</i>	Opel, Rishi	Follows, Stephen	Opel, Rishi	Foreman, Jamie	The Grind Productions	Crime	2007
<i>Ground Floor</i>	Strathie, Carl	Kilby, Charlette	Strathie, Carl	Lawrence, Gary	Strathie Film Ltd UK	Comedy	2010
<i>Grow Your Own (aka The Allotment)</i>	Laxton, Richard	Ryan, Barry	Cottrell, Frank	Wong, Benedict	Warp Films	Comedy	2007
<i>Gun of the Black Sun (aka Luger of the Black Sun)</i>	Burr, Jeff	Douglas, Gary	Tilley, Patrick	Douglas, Gary	Max Productions	Fantasy	2011
<i>Gypo</i>	Dunn, Jan	Wickham, Elaine	Dunn, Jan	McLynn, Pauline	Medb Films	Drama	2005
<i>Gypsy Woman</i>	Folkson, Sheree	Ackerman, Justin	Knight, Steve	Davenport, Jack	Starfield Productions	Comedy	2001
<i>H3</i>	Blair, Les	Flynn, James	McKeown, Laurence	Mackey, Brendan	Metropolitan Films	Drama	2001
<i>Hacked Off</i>	Weild, Andrew	Barsby, Fraser	Weild, Andrew	Browne, Liam	Chipboard Productions	Horror	2003
<i>Hackney's Finest</i>	Bouchard, Chris	Price, Samantha	Haughton, Thorin	Wiseman, Nate	Ionia Films Ltd UK	Thriller	2011
<i>Halal Harry</i>	Razzaque, Russell	Maraj, Sanjay	Razzaque, Russell	McNair, Andrew	21st February Films	Comedy	2006
<i>Halfway Hotel (aka Drawn)</i>	Asomani-Poku, Nana	Eliot, Staten	Asomani-Poku, Nana	Eliot, Staten	Forward Motion Picture Company	Drama	2008
<i>Ham and the Piper</i>	Norfolk, Mark	Norfolk, Mark	Norfolk, Mark	Kissoon, Jeffery	Prussia Lane Productions Ltd.	Drama	2011
<i>Hamlet</i>	Fodor, Alexander	Allan-Slade, Paul	Nwokedi, Emeke	Belchambers, William	The Zed Resistor Company	Thriller	2007
<i>Happy Day</i>	Davis, Toby	Davis, Toby	Davis, Toby	Brookers, Paula	Toby Davis Productions	Horror	2005
<i>Happy F***** Endings</i>	Thompson, Chris	Thompson, Chris	Thompson, Chris	MacDonald, Jamie	Edinburgh College of Art	Horror	2009
<i>Hardcore: A Poke Into the Adult Film Orfice (aka Bare Naked Talent)</i>	Boreman, Linda	Withers, Mark	Withers, Mark	Constatine, Alex	Big Brush Films	Comedy	2005
<i>Hardly Bear to Look at You</i>	Melnick, Huck	Herman, Jeremy	Herman, Jeremy	Herman, Jeremy	AndBut Films	Drama	2009
<i>Harold's Going Stiff</i>	Wright, Keith	Guy, Richard	Wright, Keith	James, Eleanor	FrissonFilm Ltd	Comedy	2011
<i>Harsh Light of Day, The</i>	Milburn, Oliver	Biggins, Emma	Milburn, Oliver	Richardson, Dan	Multistory Films Ltd UK	Horror	2012
<i>Haunting of Harry Payne, The</i>	Pick, Martyn	Desira, Paul	Mangan, John	Moriarty, P H	Equilibrium Films Ltd UK	Thriller	2012
<i>Haven</i>	Green, Paul Phillip	Papadopoulou, Nefeli	Green, Paul Phillip	Macdonald, Selina	Paul Phillip Green	Drama	2007
<i>Hawk and the Dove, The</i>	Moffat, Robbie	Sutherland, Mairi	Moffat, Robbie	Gates, Jon Paul	Palm Tree UK	Drama	2002
<i>Headrush</i>	Marcus, Shimmy	Forkin, Edwina	Marcus, Shimmy	Conlon, Wuzza	Zanzibar Productions	Comedy	2003
<i>Heartlands</i>	O'Donnell, Damien	Carter, Gina	Fraser, Paul	Sheen, Michael	Revolution Films	Comedy	2002
<i>Heartless</i>	Ridley, Philip	Cross, Pippa	Ridley, Philip	Sturgess, Jim	CrossDay / May 13	Action	2009
<i>Hearts and Minds</i>	Tyler, Adam	Powell, Sarah	Tyler, Adam	Prasad, Nicholas	Scratchmark Films Ltd UK	Drama	2009
<i>Heathen</i>	Shepherd, Ross	Shepherd, Ross	Shepherd, Ross	Rudd, Tom	Paravel Films	Drama	2009
<i>Heights</i>	Terrio, Chris	Merchant, Ismail	Terrio, Chris	Close, Glenn	Merchant Ivory Productions	Drama	2005
<i>Helen</i>	Molloy, Christine	Lawlor, Joe	Molloy, Christine	Townsend, Annie	Desperate Optimists	Drama	2008
<i>Hell's Pavement</i>	Kemp, Andy	Gorman, Keith	Gorman, Keith	McLynn, Pauline	Oopic Films Ltd.	Drama	2009
<i>Hellbreeder</i>	Eaves, James	Eaves, James	Roberts, Johannes	Uphill, Lyndie	Cat'N'Cage Productions	Horror	2004
<i>Hellbride</i>	Higgins, Pat	Higgins, Pat	Higgins, Pat	Andrews, Neil	Jinx Films	Horror	2007

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<i>Hello You</i>	Keates, John	Stubbs, Nick	Keates, John	Keates, Mike	Fecund	Comedy	2006
<i>Hero Shy</i>	Jon, Oskar	Bala, Krishna	Jon, Oskar	Baster, Matthew	Twisted Head Creations Ltd UK	Comedy	2010
<i>Heroes and Villains</i>	Roberts, Selwyn	Pegg, Mark	Raymond, David	Raymond, David	One Vision Films	Romance	2006
<i>Hey, Mr. DJ</i>	Patrick, Danny	Naughton, AnneMarie	Mancini, Anthony	Wisdom, Tom	Empire Productions	Thriller	2003
<i>Hidden Persuaders, The</i>	Dudley, Wayne	Dudley, Wayne	Dudley, Wayne	Teegarden, Dayle	Dudley Dangerous Productions Ltd UK	Crime	2011
<i>Hide, The</i>	Losey, Marek	Granier-Deferre, Christopher	Whitnall, Tim	Macqueen, Alex	Poisson Rouge	Thriller	2008
<i>High Heels and Low Lives</i>	Smith, Mel	Thompson, Barnaby	Fuller, Kim	Driver, Minnie	Fragile Films	Action	2001
<i>High Stakes</i>	Ferris, Peter	Griffiths, Dewi	Doyle, Michael	Higgins, Jeff	Garland Stone Productions	Horror	2008
<i>Highlight</i>	N'Dour, Mickael	Singer-Lee, Aaron	N'Dour, Mickael	Anderson, Samuel	Maseproductions Ltd UK	Romance	2009
<i>Hijack Stories</i>	Schmitz, Oliver	Guez, Philippe	Schmitz, Oliver	Kgoroge, Tony	Black Forest Films	Crime	2001
<i>Hike, The</i>	Bryan, Rupert	Bryan, Rupert	Bryan, Rupert	Hassan, Tamer	Motion Picture House Ltd UK	Horror	2011
<i>History Boys, The</i>	Hytner, Nicholas	Loader, Kevin	Bennett, Alan	Griffiths, Richard	Free Range Films	Comedy	2006
<i>Holding, The</i>	Jacobson, Susan	Boden, Alex	Dormer, James	Groome, Georgia	Pistachio Pictures	Thriller	2011
<i>Hollow</i>	Axelgaard, Michael	Holt, Matthew	Holt, Matthew	Plumtree, Emily	Hollow Pictures	Thriller	2011
<i>Hollow, The</i>	Earnshaw, James	Gardiner, Philip	Earnshaw, James	De-leuw, Lara	Olive Studios	Horror	2011
<i>Homemade Vigilante</i>	Turner, Nathan	Turner, Nathan	Turner, Nathan	Lewis, Jack	Roys Boys Ltd UK	Comedy	2009
<i>Honey Killer, The</i>	Harrison, Richard	Crowler, Laurie	Harrison, Richard	Stone, Robert	Razor Films	Comedy	2010
<i>Honeymooner</i>	Spector, Col	Brown, Alicia	Spector, Col	Anderson, Sophie	Honeymooner Ltd.	Comedy	2010
<i>Honeymooner</i>	Tiernan, Andrew	McWilliams, Shona	Tiernan, Andrew	Stanley, Lorraine	Artina Films Ltd UK	Thriller	2010
<i>Honeymooners, The</i>	Golden, Karl	Brinkler, Martin	Golden, Karl	Byrne, Jonathan	Bord Scannan na hEireann	Comedy	2003
<i>Honeytrap, The</i>	Gunther, Michael G.	Lim, Madeline	Gunther, Michael G.	Lloyd, Emile	Film House	Thriller	2002
<i>Hoods n Halos</i>	Phillip, Yvonne	Williams, Anthony	Philip, Yvonne	Adeyemi, Benedict	Artefacts Edutainment Ltd UK	Musical	2010
<i>Hooked on a Ceiling</i>	Graham, David B	Braham, David B	Graham, David B	Branton, Rebecca	Rainy Days Pictures Ltd.	Comedy	2007
<i>Horror of the Dolls, The</i>	Davey, Shane	Davey, Shane	Davey, Shane	Allcorn, Marie	Davey Inc Productions	Horror	2010
<i>Horror!</i>	Harrison, Stu	Harrison, Stu	Harrison, Stu	Harrison, Patrick	Yousaint Productions	Comedy	2008
<i>Horrorcide</i>	Keig, Rakie	Keig, Rakie	Keig, Rakie	Woods, David	Applepaste Productions	Horror	2009
<i>Horseman</i>	McManus, Kris	Dixon, Dan	Nicholas, Jon	Rouse, Rob	It's No Joke Productions	Comedy	2009
<i>Horses 4 Courses</i>	Levene, Jon	Levene, Jon	Levene, Jon	Gillespie, Grant	Fraudster Films	Drama	2002
<i>Hounds, The</i>	del Piccolo, Maurizio	del Piccolo, Maurizio	del Piccolo, Maurizio	Moate, Maddie	MovieDel Productions Ltd UK	Horror	2012
<i>Hour of Living, The</i>	Michael, Sebastian	Michael, Sebastian	Michael, Sebastian	Absalom, Dan	Optimist Creations Ltd UK	Drama	2012
<i>How Is Your Fish Today?</i>	Guo, Xiaolu	Guo, Xiaolu	Guo, Xiaolu	Hao, Lin	Xiaolu Guo Productions	Drama	2006
<i>How to Be</i>	Irving, Oliver	Kelly, Justin	Irving, Oliver	Pattinson, Robert	How To Films	Comedy	2008
<i>How to Become a Criminal Mastermind</i>	Scriven, Henry	Morley, Jeanne Claire	Delwiche, Michael	Massey, Sam	Squirrel Vision Productions Ltd UK	Comedy	2011
<i>How to Film Your Neighbour</i>	Skitt, Steve	Argent, Douglas Elford	Martin, Sean	Renouf, Nik	Mad as Hell Films	Thriller	2003
<i>How to Stop Being a Loser</i>	Burns, Dominic	Phillips, Simon	Grezo, Chris	Grant, Richard E	Dead on Arrival Digital Ltd UK	Comedy	2011
<i>Huge</i>	Miller, Ben	Farhall, Rebecca	Miller, Ben	Clarke, Noel	Fortuitous Films	Drama	2010
<i>Human Centipede II: Full Sequence, The</i>	Six, Tom	Six, Tom	Six, Tom	Harvey, Laurence R	Bounty Films Ltd UK	Crime	2011
<i>Hunger</i>	McQueen, Steve	Hastings-Smith, Laura	Walsh, Enda	Fassbender, Michael	Blast! Films	Drama	2008
<i>Hush</i>	Tonderai, Mark	Stewart, Zoe	Tonderai, Mark	Ash, Will	Warp X	Thriller	2008
<i>Hush Your Mouth</i>	Tyrwhitt, Tom	Brown, Liza	Tyrwhitt, Tom	Sheen, Ruth	Neophyte	Crime	2007
<i>I am a Great Man</i>	Crowley, Alex	Chys, Robin	Crowley, Alex	Saunders, Laurence	Noodle Pictures Ltd UK	Comedy	2011
<i>I Am Nasrine (aka Ali in Wonderland)</i>	Gharavi, Tina	Baillie, James Richard	Gharavi, Tina	Sadeghi, Micsha	Bridge + Tunnel Productions	Drama	2010
<i>I Can't Think Straight</i>	Sarif, Shamim	Kattan, Hanan	Sarif, Shamim	Ray, Lisa	Enlightenment Productions	Romance	2008
<i>I Know You Know</i>	Kerrigan, Justin	Hibbin, Sally	Kerrigan, Justin	Carlyle, Robert	Parallax East	Drama	2008
<i>I Really Hate My Job</i>	Parker, Oliver	Higgie, Andrew	Higgie, Jennifer	Campbell, Neve	3DD Productions	Comedy	2007
<i>I Want Candy</i>	Surjik, Stephen	Thompson, Barnaby	Hughes, Phil	Riley, Tom	Ealing Studios	Comedy	2007
<i>I'll Be There</i>	Ferguson, Craig	Robinson, James G	Ferguson, Craig	Ferguson, Craig	Immortal Entertainment	Comedy	2003
<i>I'll Sleep when I'm Dead</i>	Hodges, Mike	Hodges, Mike	Preston, Trevor	Owen, Clive	Mosaic Film Group	Crime	2003
<i>Iced Lolly</i>	Next, Seumas	Warner, Ben	Next, Seumas	Mackey, David	Occidental Films	Adventure	2003
<i>Icharus Broken</i>	Wilton, Tom	West, Philip	Wilton, Tom	Clayton Smith, Philip	Bring It Give It Films	Drama	2007

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<i>id-iology</i>	Terran, Will	Terran, Will	Terran, Will	Tulip, Lizanne	Black Barn Productions	Drama	2011
<i>Idol of Evil</i>	McDonagh, Kevin	Nicol, AJ	McDonagh, Kevin	Cambridge, Richard	Rotunda Films	Drama	2003
<i>If You Can't Stand the Heat</i>	Heron, Thomas	Johnston, Christine	Heron, Richard	Coleman, Michael	Muckle Films	Crime	2006
<i>Ill Manors</i>	Drew, Ben	Ghani, Atif	Drew, Ben	Ahmed, Riz	Ill Manors	Musical	2011
<i>Illusion</i>	Brown, Alan	Brown, Alan	Brown, Alan	Scantori, Frank	Krown Films Ltd UK	Drama	2010
<i>Imaginary Summer</i>	Coley, Rebecca	Coley, Rebecca	Coley, Rebecca	Thomas, Gareth	Spinky Films	Drama	2007
<i>Imagine Me and You</i>	Parker, Ol	Balhetchet, Sophie	Parker, Ol	Perabo, Piper	BBC Films	Comedy	2005
<i>Imperium</i>	Ali, Jameal	Mohammed, Shakeel	Ali, Jameal	Khan, Sojib	Ali Entertainment	Drama	2009
<i>In a Dark Place... (aka Dark Places)</i>	Rotunno, Donato	Bajohra, Andreas	Waddington, Peter	Sobieski, Leelee	Phantom Pictures	Horror	2006
<i>In a Man's World</i>	Hutcheon, Lee	Hutcheon, Lee	Hutcheon, Lee	Caird, Ronnie	Clanfilm Productions	Crime	2004
<i>In and Out of Planet Earth</i>	Peterson, Nick	Norwood, Tom	Gaud, Nicolas	Joseph, Mark	EdgelmageBank	Action	2005
<i>In Love with Alma Cogan</i>	Britten, Tony	Mordaunt, Katja	Britten, Tony	Lloyd-Pack, Roger	Capriol Films Ltd UK	Drama	2011
<i>In Me (aka Hands That Do Dishes)</i>	Ricketts, Isobel	Ricketts, Isobel	Walley, James	Macqucen, Harry	Dollar Factory Films Ltd UK	Comedy	2010
<i>In Our Name (aka One in Ten)</i>	Welsh, Brian	Eastwood, Michelle	Welsh, Brian	Froggatt, Joanne	A10 Films	Drama	2010
<i>In the Dark Half (aka In the Dark)</i>	Siddons, Alastair	Matheson, Margaret	Catherine, Lucy	Curran, Tony	Bard Entertainments Ltd	Mystery	2011
<i>In the Name of</i>	Hughes, Beata	Goldman, Simon	Hughes, Beata	Collier, Melissa	Tiger Ventures	Drama	2007
<i>In the Name of Buddha</i>	Touchriver, Rajesh	George, Sai	George, Sai	Shiju, Sonyia	Da'sai Films International	Drama	2002
<i>In This World</i>	Winterbottom, Michael	Eaton, Andrew	Grisoni, Tony	Udin, Jamal	Revolution Films	Drama	2002
<i>In Your Dreams</i>	Sinyor, Gary	Sinyor, Gary	Sinyor, Gary	Fletcher, Dexter	Magnet Films	Comedy	2008
<i>Inbetweeners</i>	Fisher, Darren	Fisher, Darren	Fisher, Darren	Finlay, Robertson	The Britpack Film Company Ltd	Comedy	2001
<i>Inbred</i>	Chandon, Alex	Benfeghou, Yazid	Chandon, Alex	Hartley, Jo	New Flesh Films GmbH	Horror	2011
<i>Incapacity</i>	Wilson, Louis	Wilson, Louis	Wilson, Louis	Price, Andrew	Louisfilm	Drama	2008
<i>Incendiary</i>	Nickson, Ross	Nickson, Ross	Nickson, Ross	Morton, Lindsay	Dubious Films	Mystery	2008
<i>Infestation</i>	Evers-Swindell, Edward	Fletcher, Stuart	Fletcher, Stuart	Evison, Ross	ESP Productions	Sci-Fi	2005
<i>Infidel, The</i>	Appignanesi, Josh	Baddiel, David	Baddiel, David	Djalili, Omid	Met Film Production	Comedy	2010
<i>Infinite Justice</i>	Dehlavi, Jamil	Dehlavi, Jamil	Dehlavi, Jamil	Collins, Kevin	Dehlavi Films	Drama	2006
<i>Inheritance (aka Spadek)</i>	Porembny, Edward	Porembny, Edward	Hislop, Andy	Norstrom, Tomas	Arcadia Moving Pictures	Drama	2005
<i>Innocent Crimes</i>	Green, Jonathan	Green, Jonathan	Green, Jonathan	Grivas, Venetia	Carpathian Films Ltd UK	Crime	2011
<i>Inside Outside Lydia's Head</i>	Reyntiens, Dominick	Foster, Simon	Reyntiens, Dominick	Milkovich, Natasha	Covent Garden Films	Drama	2002
<i>Intended, The Intergalactic Combat (aka Team One)</i>	Levring, Kristian	Blenkov, Malene	McTeer, Janet	Feild, JJ	Parallex Projekt (Innocence) Ltd.	Drama	2002
	Brady, Ray	Brady, Ray	Brady, Ray	Alexander, Gordon	Imaginary Films	Sci-fi	2002
<i>Interview with a Hitman</i>	Bhandal, Perry	Fisher, Dean	Bhandal, Perry	Goss, Luke	Scanner Rhodes Productions Ltd UK	Thriller	2012
<i>Interview with a Politician</i>	Kamatkar, Niranjan	Kamatkar, Niranjan	Kamatkar, Niranjan	Wheeler, Antony	Wise Thoughts / Blue & Yellow Productions	Drama	2008
<i>Invalid Debris</i>	Stevens, Robbi	Stevens, Robbi	Howell, Victoria	Bradley, Francesca	YPTC	Action	2009
<i>Invisible Eyes</i>	Cohen, Olivier	Rosilio, Liz	Cohen, Olivier	Mechler, Pia	HiDe Films Ltd.	Drama	2009
<i>Island</i>	Taylor, Brek	Gardner, Amy	Mitchell, Elizabeth	Press, Natalie	Finite Films	Drama	2011
<i>Island</i>	Malik, Rehan	Hardy, Leon	Hardy, Leon	Montrose, Gabriella	European Broadcast	Thriller	2012
<i>Isle of Dogs</i>	Sutton, Tammi	Handorf, Jen	Hogan, Sean	Nedeljakova, Barbara	Isle of Dogs Films Ltd UK	Crime	2011
<i>It's All Gone Pete Tong</i>	Dowse, Mike	Niblo, Allan	Dowse, Mike	Kaye, Paul	Vertigo Films	Drama	2004
<i>Itch</i>	Radosavijevic, Jay	Radosavijevic, Jay	Radosavijevic, Jay	Andrew, Paul	Handcrafted Films	Thriller	2007
<i>Jack Falls</i>	Tanter, Paul	Burns, Dominic	Tanter, Paul	Hassan, Tamer	Hawthorn Productions	Crime	2011
<i>Jack of Diamonds</i>	Kirby, Jon	Manson, Crispin	Mitchell, David	Manson, Crispin	Enterprise Films	Crime	2001
<i>Jack Said</i>	Basannavar, Leander	Phillips, Simon	Tanter, Paul	Dyer, Danny	Lucky Strike Productions	Thriller	2009
<i>Jack Says</i>	Phillips, Bob	Phillips, Simon	Ronald, Alan	Phillips, Simon	Press On Features	Crime	2008
<i>Jack, The Last Victim</i>	Peel, Phil	Peel, Phil	Peel, Phil	MacGregor, Gillian	Grindstone Films	Thriller	2005
<i>Jam</i>	Abela, Angelo	Abela, Angelo	Abela, Angelo	Alderton, Terry	Jam Films	Comedy	2006
<i>January 2nd</i>	Winn, Matt	Clements, Francis	Ivan	Freeman, Ellis	Globocine International Pictures	Comedy	2006
<i>Je Suis Daddy</i>	N'Dour, Mickael	de Langlade, Gregoire	Klein, Zak	Durden, Richard	Blacklight Productions Ltd UK	Romance	2011
<i>Jealous God, The</i>	Woodcock, Steven	Woodcock, Steven	Woodcock, Steven	Merrells, Jason	North Country Productions	Drama	2004
<i>Jean Charles (aka Brazuca)</i>	Goldman, Henrique	Goldman, Henrique	Goldman, Henrique	Mello, Selton	Mango Films	Biography	2009

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<i>Jelly Dolly</i>	Gent, Susannah	Ryan, Barry	Gent, Susannah	Walton, Rachael	Cargo Film Ltd.	Horror	2004
<i>Jen (aka Another Life)</i>	Allder, Julian	Allder, Julian	Allder, Julian	Ryan, Danielle	TeamTV	Drama	2010
<i>Jesus the Curry King</i>	John, Marc	John, Marc	John, Marc	Carr, Brendan	Aylesbury Films	Fantasy	2001
<i>Jetsam</i>	Welsford, Simon	Welsford, Simon	Welsford, Simon	Reid, Ales	Skyman Films	Thriller	2007
<i>Jigsaw of Life, The</i>	McDermott, Mark	McDermott, Mark	McDermott, Mark	Hooton, Nick	Creative Gold Ltd	Thriller	2005
<i>Jitters</i>	Zopboniasson, Baldwin	Downey, Mike	Reyhisdottir, Ingibjorg	Fjalarrson, Atli Oskar	Film and Music Entertainment	Drama	2010
<i>Johnny Was</i>	Hammond, Mark	Maquire, Tom	Foley, Brendan	Jones, Vinnie	Borderline Productions	Action	2006
<i>Journal of a Contract Killer</i>	Maylam, Tony	Damiano, Michele	Maylam, Tony	Powell, Justine	MJ Films Ltd.	Thriller	2008
<i>Journey to the Moon</i>	Cookson, Stephen	Cookson, Stephen	Cookson, Stephen	Ahluwalia, Jassa	Dream on Films	Adventure	2008
<i>Journey, The</i>	Coull, Fraser	Clark, James	Coull, Fraser	Maxwell, Ross	Silly Wee Films	Drama	2006
<i>Julius Caesar</i>	Hamilton, Adam Lee	Moskal, Katie	Hamilton, Adam Lee	Baddley, Simon	The Co-perative British Youth Film Academy	Drama	2011
<i>Jump Tomorrow</i>	Hopkins, Joel	Usborne, Nicola	Hopkins, Joel	Adebimpe, Tunde	Eureka Pictures	Drama	2001
<i>Junk Mail</i>	Crosbie, Jim	Crosbie, Jim	Crosbie, Jim	French, Miranda	Mardi Gras Motion Pictures	Drama	2005
<i>Junkhearts</i>	Krishnan, Tinge	Katz, Karen	Frank Simon	Marsan, Eddie	Coded Pictures, Hustle Productions	Drama	2011
<i>Just for the record</i>	Lawson, Steven	Sothcott, Jonathan	Barron, Phillip	Dyer, Danny	Black and Blue Films Ltd UK	Comedy	2010
<i>Just Ines</i>	Grant, Marcel	Grant, Marcel	Grant, Marcel	Weyman, Daniel	Shipwreck Films	Drama	2010
<i>Justin's Genes (aka Throw of a Dice)</i>	Chazelle, Chaand	Chazelle, Chaand	Chazelle, Chaand	Johnson, Wil	CVS Films Ltd UK	Drama	2011
<i>K</i>	Allen, Don	Reece, Harry	Barron, Phillip	Salmon, Colin	All Enquiries Productions	Thriller	2009
<i>Kandahar Break</i>	Whitney, David	Whitney, David	Whitney, David	Dooley, Shaun	Millhouse Films Ltd.	Drama	2009
<i>Kapital</i>	Finlay-Hall, Rebecca	Hall, Greg	Hall, Greg	Oldham, Richard	Prodigal Productions	Drama	2007
<i>Katalin Varga</i>	Strickland, Peter	Strickland, Peter	Strickland, Peter	Peter, Hilda	The Razeti Group	Crime	2009
<i>Kelling Brae (aka Big Sky)</i>	Miller, Alan	Miller, Alan	Miller, Alan	Sawiris, Jackie	Shake the Tree Productions	Drama	2006
<i>Kelly + Victor</i>	Evans, Kieran	Marmot, Janine	Evans, Kieran	Press, Natalie	Hot Property Films Ltd UK	Drama	2012
<i>Kenneth</i>	Farren, Peter Anthony	Semple, Oliver	Anthony, Peter	Casey, Duncan	Monster Island Films Limited	Comedy	2011
<i>Kevin & Perry Go Large</i>	Bye, Ed	Bennett-Jones, Peter	Enfield, Harry	Enfield, Harry	Tiger Aspect Pictures	Comedy	2000
<i>Kick Off (aka KickOff)</i>	Beadle-Blair, Rikki	Beadle, Carleen	Beadle-Blair, Rikki	Chrysanthou, David	Achilles Entertainments	Comedy	2010
<i>Kicks</i>	Heymann, Lindy	Stebbing, Andy	Campbell, Leigh	Hayes, Kerrie	Starstruck Films Ltd.	Drama	2009
<i>Kidulthood</i>	Huda, Menhaj	Isaac, George	Clarke, Noel	Villiers, Christopher	Cipher Films	Drama	2006
<i>Kill Keith</i>	Thompson, Adam	Major, Tim	Thompson, Adam	Phillips, Simon	Dead on Arrival Digital Ltd UK	Comedy	2011
<i>Kill Kill Faster Faster</i>	Roberts, Gareth Maxwell	Dusi, Carlo	Roberts, Gareth Maxwell	Bellows, Gil	Aria Films	Drama	2008
<i>Kill List</i>	Wheatley, Ben	Jones, Claire	Wheatley, Ben	Maskell, Neil	Rook Films	Horror	2011
<i>Killer Bitch</i>	Galvin, Liam	Galvin, Liam	Galvin, Liam	Rowland, Yvette	Gangster Videos	Thriller	2010
<i>Killer Gloves, The (aka Stitches)</i>	Fleming, Trev	Xander, Nico	Isserow, Lee	Silver, Lauren	Opiate of the People Films	Horror	2010
<i>KillerKiller</i>	Higgins, Pat	Higgins, Pat	Higgins, Pat	Collins, Richard	Jinx Media	Horror	2007
<i>Killing of John Lennon, The</i>	Piddington, Andrew	Singh, Rakha	Piddington, Andrew	Ball, Jonas	Picture Players Productions	Drama	2006
<i>Kin</i>	Welsh, Brian	Rees, Laura	Welsh, Brian	Kinniard, Dominic	NFTS	Drama	2009
<i>Kindness of Strangers, The</i>	Hadfield, Deborah	Hadfield, Deborah	Hadfield, Deborah	Bullivant, Georgie	Queen Bee Films Limited	Drama	2010
<i>Kingdom</i>	Barker, Kenneth D	Barker, Kenneth D	Barker, Kenneth D	Kirk, Simon	Water of the Rock	Adventure	2001
<i>Kings</i>	Collins, Tom	Larkin, Jacqueline	Collins, Tom	Meaney, Colm	Newgrange Pictures	Drama	2007
<i>Kino</i>	Zaffino, Marco	Zaffino, Marco	Zaffino, Marco	Sykes, Kim	MinstrelWallEye Productions	Action	2009
<i>Kiss Kiss (Bang Bang)</i>	Sugg, Stewart	Richardson, James	Sugg, Stewart	Bettany, Paul	Vertigo Films	Comedy	2001
<i>Kiss of Life</i>	Young, Emily	Griffiths, Gayle	Young, Emily	Mullan, Peter	BBC Films	Drama	2003
<i>Knackery, The</i>	Clarke, George	Clarke, George	Clarke, George	Boden, Iain	Yellow Fever Productions Ltd UK	Horror	2009
<i>Knocking on Heaven's Door (aka Knock Knock)</i>	Peterson, Nick	Norwood, Tom	Gaud, Nicolas	Mansell, Stuart	EdgeImageBank	Sci-fi	2008
<i>Kung Foo Flid (aka KFF, aka Unarmed but Dangerous)</i>	Leret, Xavier	Sothcott, Jonathan	Leret, Xavier	Fraser, Mat	The Film Lounge Ltd UK	Action	2009
<i>Kyle</i>	Bradburn, John	Fleming, George	Bradburn, John	Blackwood, Hugh	Jovian Productions	Drama	2007
<i>Ladies in Lavender</i>	Dance, Charles	Brown, Nicolas	Locke, William J.	Dench, Judi	Future Films	Drama	2004
<i>Lady Godiva</i>	Jewson, Vicky	Kempton, Adam	Jewson, Vicky	Thomas, Phoebe	Jewson Film Productions	Romance	2008
<i>Lake, The</i>	Golden, Robert	Haire, Denise	Golden, Robert	Pearce, Eve	Robert Golden Pictures	Drama	2002
<i>Land Gold Women</i>	Hari, Avantika	Agrawal, Vivek	Hari, Avantika	Samra, Narinder	A Richer Lens Ltd.	Drama	2009

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<i>Lands End</i>	Torjussen, Ruth	Torjussen, Ruth	Torjussen, Ruth	Bettany, Lisa	Betty Mae Productions	Drama	2007
<i>Large</i>	Edgar, Justin	Usborne, Alex	Dent, Mike	Catherwood, Emma	Picture Palace	Comedy	2001
<i>Lark, The</i>	Tanner, Steve	Tanner, Steve	Farmer, Paul	Woodvine, Mary	War-Rag LLP	Horror	2007
<i>Last Blood Line, The</i>	Evans, John C	Riera, Ernest	Evans, John C	Moraghan, Mark	Short Feature Production Company Ltd.	Horror	2007
<i>Last Ferry, The (aka Red and Blues: The Ballad of Dixie and Kenny)</i>	Lysaght, Ian	Lysaght, Ian	Kirby, Dave	Aldridge, John	Miracle Productions Ltd UK	Thriller	2012
<i>Last Flight to Abuja, The</i>	Emelonye, Obi	Thompson, Charles	Emelonye, Obi	Jalade-Ekeinde, Omotola	The Nollywood Factory Ltd UK	Thriller	2012
<i>Last Great Wilderness, The</i>	Mackenzie, David	Berrie, Gillian	Tait, Michael	Mackenzie, Alastair	Sigma Films	Comedy	2002
<i>Last Horror Movie, The</i>	Richards, Julian	Piggott, Zorana	Handel, James	Howarth, Kevin	Prolific Films	Horror	2003
<i>Last Man, The</i>	Murray, Alex	Langley, Robert	Murray, Alex	Bennett, Kerry	Creative Outlaw	Horror	2010
<i>Last Night at Alfredo's</i>	Rhodes, Daniel	Rhodes, Daniel	Farelli, Dom	Anscombe, Nicholas	TP4 Films Ltd UK	Comedy	2011
<i>Last Resort</i>	Pawlikowski, Pawel	Caleb, Ruth	Joffe, Rowan	Korzun, Dina	BBC Films	Drama	2000
<i>Last Seven, The (aka T17)</i>	Naqvi, Imran	Meredith, Toby	Stanley, John	Dyer, Danny	Press On Features Ltd UK	Thriller	2010
<i>Last Summer</i>	Li, Hongwei	Xiang, Yan	Zai, Kang	Li, Yue	Oriental Dragon	Drama	2007
<i>Last Thakur, The</i>	Ahmed, Sadik	Ghani, Atif	Taylor, Heather	Anam, Tariq	Ivanorite Limited	Action	2008
<i>Late Night Shopping</i>	Metzstein, Saul	Lamont, Angus	Lothian, Jack	Ashfield, Kate	Ideal World Films	Comedy	2001
<i>Late Twentieth, The</i>	Hajaig, Hadi	Hajaig, Hadi	Hajaig, Hadi	Allder, Justin	Timeless Pictures PLC	Crime	2002
<i>Lava</i>	Tucker, Joe	Riley, Mike	Tucker, Joe	Tucker, Joe	Sterling Pictures	Comedy	2001
<i>Lawless Heart, The</i>	Hunter, Neil	Pope, Martin	Hunter, Neil	Nighy, Bill	Martin Pope Productions	Comedy	2001
<i>Lazy Days... Crazy Nights</i>	Dale, Samuel	Dale, Samuel	Dale, Samuel	Davies, Sarah	Lo-Fi Films	Musical	2002
<i>Le Donk & Scor-zay-zee</i>	Meadows, Shane	Herbert, Mark	Meadows, Shane	Considine, Paddy	Warp X Films	Comedy	2009
<i>Le Fear II: Le Sequel</i>	Croot, Jason	Croot, Jay	Croot, Jason	Tiernan, Andrew	AJC Production	Comedy	2011
<i>Leaves</i>	Waugh, Ian	Waugh, Ian	Waugh, Ian	Donald, Ewan	Marquise	Drama	2008
<i>Leaving Baghdad (aka Al Raheel Min Bagdad)</i>	Al-Janabi, Koutaiba	Al-Janabi, Koutaiba	Al-Janabi, Koutaiba	Al Heifi, Samir Kadhom	Reel Art Pictures Ltd UK	Drama	2010
<i>Left For Dead</i>	Boyask, Ross	Hobden, Phil	Foiadelli, Adrian	Savage, Glenn	Modern Life	Thriller	2004
<i>Legacy: Black Ops (aka Legacy)</i>	Ikimi, Thomas	Parker, Kieran	Ikimi, Thomas	Elba, Idris	Black Camel Pictures	Thriller	2010
<i>Leila</i>	Manning, Lesley	McFie, Kirsten	Manning, Lesley	Annett, Chloe	Met Film Production Ltd UK	Drama	2010
<i>Lena: The Bride of Ice</i>	Steele, Polly	Bimler, Margit	Steele, Polly	Purefoy, James	UKI Films	Drama	2008
<i>Length of Spring, The</i>	Carretta, Al	Carretta, Al	Carretta, Al	Brandon, Simon	Nighpiece Media Ltd UK	Romance	2010
<i>Lesbian Vampire Killers</i>	Claydon, Phil	Hall, Steve Clarke	Hupfield, Paul	Corden, James	Alliance Films	Action	2008
<i>Letter to Obama (aka Nour)</i>	Mokhtar, Ayman	Mokhtar, Ayman	Mokhtar, Ayman	El Zein, Hussein	Filmart Ltd UK	Drama	2011
<i>Liability, The</i>	Viveiros, Craig	Johns, Richard	Wrathall, John	Roth, Tim	Corona Pictures Ltd UK	Thriller	2012
<i>Liam</i>	Frears, Stephen	McKeown, Colin	McGovern, Jimmy	Hart, Ian	BBC Films	Drama	2000
<i>Lie Still (aka The Haunting of #24)</i>	Hogan, Sean	Chowdhry, Navin	Hogan, Sean	Laing, Stuart	Indobrit Pictures Ltd.	Horror	2005
<i>Life Classes</i>	Morgan, Robin	Morgan, Robin	Aldous, Simon	Maynard, Henry	Boogle Eyes Productions Ltd UK	Comedy	2010
<i>Life Goes On</i>	Datta, Sangeeta	Datta, Soumik	Datta, Sangeeta	Tagore, Sharmila	Stormglass Productions Ltd UK	Drama	2009
<i>Life Goes On</i>	de Pellette, Alan	de Pellette, Alan	de Pellette, Alan	Kay, Marysia	Aficionado Films	Comedy	2010
<i>Life Just Is</i>	Barrett, Alex	Stuart, Tom	Barrett, Alex	de Meo, Will	Patchwork Productions	Drama	2012
<i>Lighthouse Hill</i>	Fairman, David	Skeggs, Hamish	Cobb, Sharon	Fleming, Jason	Carnaby International	Comedy	2002
<i>Lightning Falls</i>	Lynch, Johnny	Witter, Clay	Lynch, Johnny	Cernow, Sean	Sawn Off Picture House	Drama	2011
<i>Like Father</i>	Grassick, Richard	Grassick, Richard	Grassick, Richard	Armstrong, Joe	Amber Films	Drama	2001
<i>Limelight, The</i>	Long, Paul	Maney, Glen	Maney, Glen	Grover, Ricky	The Creative Film Company	Comedy	2007
<i>Limescale</i>	Terran, Will	Terran, Will	Terran, Will	O'Reilly, Stewart	Black Barn Productions	Drama	2005
<i>Lipstikka (Odem)</i>	Sagall, Jonathan	Allon, Guy	Sagall, Jonathan	Khouri, Clara	Obelis Productions	Drama	2011
<i>Little Box of Sweets</i>	Das, Meneka	Das, Sheenu	Das, Meneka	Anderson, Joe	Oceansonic Pictures Ltd	Drama	2006
<i>Little Deaths</i>	Merchant, Oliver	Emery, Peter	Jones, Matt	Ruggieri, Elio	Carbonark Films	Thriller	2007
<i>Little Deaths</i>	Hogan, Sean	Wright, Samantha	Parkinson, Andrew	Ainslie, Scott	Almost Midnight Productions	Horror	2011
<i>Little England II</i>	Brady, Ray	Brady, Ray	Brady, Ray	Brady, Des	Imaginary Films 2000 Ltd.	Drama	2002
<i>Little White Lies</i>	James, Caradog	Giwa-Amu, John	Griffin, Helen	Griffin, Helen	Red and Black Films	Comedy	2006
<i>Live East Die Young</i>	Hypponen, Laura	Hypponen, Laura	Hypponen, Laura	Grisedale, Zoe	Electric Blue Films Ltd UK	Drama	2011

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<i>Lives of the Saints, The</i>	Cottam, Chris	Hastings-Smith, Laura	Grisoni, Tony	Cosmo, James	Dazed Film & TV	Comedy	2006
<i>Living and the Dead, The</i>	Rumley, Simon	O'Hagan, Nick	Rumley, Simon	Bill, Leo	Giant Films	Horror	2006
<i>Living in Hope</i>	Miller, John	De Beaujeu, Guy	De Beaujeu, Guy	Harper, Tom	Fluidity Films	Comedy	2002
<i>London Life</i>	Medaram, Naveen	Patel, Renu	Medaram, Naveen	Shan, Asad	Kaybee Pictures Ltd UK	Romance	2010
<i>London to Brighton</i>	Williams, Paul Andrew	Clark, Alastair	Williams, Paul Andrew	Stanley, Lorraine	Steel Mill Pictures	Drama	2006
<i>London Voodoo</i>	Pratten, Robert	Pratten, Robert	Pratten, Robert	Stewart, Sara	Zen Films	Horror	2004
<i>Lookin' for Lucky</i>	Leonard, Chris	O'Byrne, Joe	O'Byrne, Joe	Bonelle, Clyve	Albino Injun Ltd	Drama	2009
<i>Lord of the Dance in 3D</i>	Viner, Marcus	Bethavas, Vicki	Viner, Marcus	Flatley, Michael	Nineteen Fifteen Productions Ltd UK	Musical	2011
<i>Losers Anonymous</i>	Smith, Kevin W	Smith, Kevin W	Smith, Kevin W	Armesto, Sebastian	Canned Comedy Productions	Drama	2008
<i>Lost Dogs</i>	Doyle, Jim	Raschid, Neville	MacNabb, Tony	Moody, Ron	Optimist Films	Comedy	2005
<i>Lost Weekend</i>	Rattray, David	McKenzie, Matthew	Rattray, David	Stewart, Alan	Digital Liberty	Drama	2007
<i>Lost, The</i>	Jones, Neil	Brennan, Stuart	Brennan, Stuart	Cushing, Peter	Burn Hand Film Production	Horror	2006
<i>Lost, The</i>	Neethling, Johan	Neethling, Johan	Neethling, Johan	Arends, Elizabeth	Thames Gate Films	Horror	2012
<i>Lottery</i>	Moss, Rod	Kay, Simon	Moss, Rod	Robertson, Stewart	Camerashy Productions	Drama	2007
<i>Lotus Eaters</i>	McGuinness, Alexandra	Blanshard, Kyle	McGuinness, Alexandra	Campbell-Hughes, Antonia	McGuinnessLee	Drama	2010
<i>Louie</i>	Kay, Jonathan	Kay, Jonathan	Baxter, Graeme	Beech, Lucy	Red Rose Media Ltd UK	Comedy	2008
<i>Love + Hate</i>	Savage, Dominic	Thomas, Neris	Savage, Dominic	Hudson, Tom	Ruby Films	Drama	2005
<i>Love and Rage</i>	Black, Cathal	Black, Cathal	Lynch, Brian	Scacchi, Greta	Black Forest Films	Drama	2000
<i>Love Life (aka Daddy)</i>	Brady, Ray	Atkins, Chris	Brady, Ray	Backhouse, Des	Imaginary Films	Drama	2001
<i>Love Me Still (aka Friends and Enemies)</i>	Hiller, Danny	Hiller, Danny	Munns, Paul	Howard, Andrew	Defiant Films	Crime	2008
<i>Love the One You're With</i>	Moffat, Robbie	Sutherland, Mairi	Moffat, Robbie	Crawford, Hazel	Palm Tree UK	Drama	2000
<i>Love Tomorrow</i>	Payne, Christopher	Moon, Stephanie	Payne, Christopher	Jourdain, Cindy	Delilah Film Ltd UK	Romance	2010
<i>Love's Kitchen (aka No Ordinary Trifle)</i>	Hacking, James	Davies, J. Alan Davis	Hacking, James	Atterbury, John	Just Nuts Films	Comedy	2011
<i>Lovelorn (aka Inner Calm)</i>	Preston, Becky	Cheung Christine	Preston, Becky	James, Phillip	Tread Softly Productions	Drama	2010
<i>Lovesick: Sick Love (aka The Chambermaid)</i>	Buld, Wolfgang	Coe, Nick	Buld, Wolfgang	Conway, Paul	Dark Black Films	Horror	2004
<i>Loving Glances (aka Sjaž u Ocima)</i>	Karanovic, Srdjan	Cvijanovic, Zoran	Karanovic, Srdjan	Alihodzic, Senad	Film and Music Entertainment	Drama	2003
<i>Low</i>	Shepherd, Ross	Tighe, Jamie	Tighe, Jamie	Keyes, David	Paravel Films	Thriller	2011
<i>Low Down, The</i>	Thraves, Jamie	Llewellyn, Sally	Thraves, Jamie	Gillen, Aidan	British Screen Productions	Drama	2000
<i>Low Tide</i>	Sanders, Jon	Sanders, Jon	Sanders, Jon	Chappell, Jan	Oxymoron Films	Drama	2008
<i>Luminal</i>	Vecchiato, Andrea	Tate, Alex	Santacroce, Isabella	Lavant, Denis	Hadaly Pictures	Drama	2004
<i>Lunar Girl</i>	Sharp, Janis	Sharp, Wilson	Sharp, Janis	Wilson, Charli	Innocent Films	Musical	2001
<i>Lunatic</i>	Maloney, Bill	Maloney, Maria	Maloney, Bill	Maloney, Bill	Pie 'n' Mash Films Ltd	Drama	2007
<i>Luzhin Defence, The</i>	Gorris, Marleen	Becker, Louis	Berry, Peter	Turturro, John	Clear Blue Sky Productions	Drama	2000
<i>Lycanthropy</i>	McDonagh, Kevin	McDonagh, Kevin	McDonagh, Kevin	Calil, George	Rotunda Films	Crime	2006
<i>Mad Dogs</i>	Jamal, Ahmed	Sharma, Poonam	Louvish, Simon	Pryce, Jonathan	Roaring Mouse Films	Thriller	2000
<i>Mad, Sad and Bad</i>	Luthra, Avie	Alderson, Christine	Luthra, Avie	Syal, Meera	Ipsa Facto Films	Comedy	2009
<i>Made in Romania</i>	Louthan, Guy Jon	Louthan, Guy Jon	Louthan, Guy Jon	Tilly, Jennifer	Celadon Motion	Comedy	2010
<i>Madness in the First Degree</i>	Searle, Geoff	Messer, Mike	Searle, Geoff	Straker, Lance	Mapletown Motion Picture Company	Action	2005
<i>Madrigal</i>	Barowitz, Jonathan	Sayer, Daniel	Sayer, Daniel	Cooper, Dan	Rabblewise Films	Drama	2006
<i>Magdalene Sisters, The</i>	Mullan, Peter	Higson, Frances	Mullan, Peter	McEwan, Geraldine	Element Films	Drama	2002
<i>Magic Hour 2, The</i>	Islam, Sanchita	Edgar, Justin	Bulmer, Alex	Alderton, John	104 Films Ltd UK	Drama	2010
<i>Magic Hour, The</i>	Mager, William	Edgar, Justin	Swinbourne, Charlie	Kirby, Matt	104 Films Ltd UK	Drama	2009
<i>Magicians</i>	O'Connor, Andrew	Madden, Ollie	Armstrong, Jesse	Mitchell, David	Intermedia	Comedy	2007
<i>Making a Killing (aka Murder by Design)</i>	Driscoll, Ryan Lee	Driscoll, Ryan Lee	Driscoll, Ryan Lee	Gallagher, Sean	Shining Light Productions	Thriller	2002
<i>Making of Plus One, The (aka Making of Plus One with Kate, Cate and George, the Story of a Hollywood Nobody, The)</i>	McGuckian, Mary	McGuckian, Mary	McGuckian, Mary	Bluteau, Lothaire	Pembridge Pictures	Comedy	2009
<i>Making Waves</i>	Van Pallandt, Nicolas	Burns, David	Van Pallandt, Nicolas	Henderson, Craig	Eden Films	Comedy	2004
<i>Malicious Intent</i>	Patrick, Danny	Camby, Louise	Patrick, Danny	Gerard, Jason	Empire Productions	Crime	2000
<i>Man About Dog</i>	Breathnach, Paddy	Channing-Williams, Simon	Elliott, Pearse	Murphy, Tom	Potboiler Productions	Comedy	2004
<i>Man Dancin' (aka Kerrigan's Passion)</i>	Stone, Norman	Marshall, Ray	Casci, Sergio	Ferns, Alex	Festival Films	Drama	2003

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<i>Man in a Box</i>	Rhys, Steven	Thomson, Robin	Reade, Helen	O'Loughlin, Alistair	Films for Nothing	Thriller	2008
<i>Man in a Hat</i>	Hare, David	Hudson, Rob	Hudson, Rob	Thompson, Erin	Harebrained Films	Drama	2006
<i>Man Inside, The</i>	Turner, Dan	Fisher, Dean	Turner, Dan	Mullan, Peter	Scanner Rhodes Productions Ltd UK	Thriller	2012
<i>Man Who Sold the World</i>	Melville, Louis	Feneghan, Stuart	Melville, Louis	Sidgwick, Jonathan	Man Who Films	Horror	2006
<i>Man Who Walked, The</i>	Willis, James	Willis, James	Willis, James	Troisi, Claudio	Contains Nuts Productions	Drama	2011
<i>Man Who Would be Queen</i>	Amalou, J K	Amalou, Sam	Amalou, J K	Laing, Stuart	Silver Leaf Productions	Comedy	2007
<i>Mandrake Root, The</i>	Bogdanov, Malachi	Woods, Simon M	Bogdanov, Malachi	Bateman, Geoffery	European Drama Network	Comedy	2008
<i>Manifesto</i>	Metcalfe, Tom	Rowley, John	Metcalfe, Tom	Palmer, James	Thus Spoke Productions	Drama	2008
<i>Market: A Tale of Trade, The</i>	Hopkins, Ben	Behesht, Roshanak	Hopkins, Ben	Ayadin, Tayang	Flying Moon Filmproduction	Drama	2008
<i>Married/Unmarried</i>	Noli	English, Jonathan	Noli	Seganti, Paolo	Spice Factory	Drama	2001
<i>Mask of Sanity, The</i>	Chandran, Govind	Chandran, Govind	Chandran, Govind	Elwim, Sam	Oxford Brookes Film Productions Ltd UK	Thriller	2012
<i>Master and Victim</i>	Burns, Mark	Burns, Mark	Burns, Mark	Turrell, George	Crystal Media Productions Ltd UK	Horror	2010
<i>Masterpiece</i>	Tanner, Andrew	Tanner, Andrew	Tanner, Andrew	Clack, Boyd	Burn Hand Film Productions	Thriller	2010
<i>May Nothing But Happiness Come Through Your Door</i>	Yu, Chi	Yu, Chi	Yu, Chi	Romero, Gerardo	The Alpha Channel	Crime	2005
<i>McQueen</i>	Lee, Oliver	Battle, Lee	Lee, Oliver	Battle, Lee	Bittersweet Pictures Ltd UK	Drama	2011
<i>Me Without You</i>	Goldbacher, Sandra	Dwyer, Finola	Goldbacher, Sandra	Friel, Anna	Finola Dwyer Productions	Drama	2001
<i>Mean Machine</i>	Skolnick, Barry	Vaughn, Matthew	Fletcher, Charlie	Jones, Vinnie	Ska Films	Comedy	2001
<i>Meanwhile</i>	Millward, Jason	Shirt, Lairy	Millward, Jason	Hill, Rupert	Lairy Shirt Films	Comedy	2003
<i>Measure for Measure (aka William Shakespeare's Measure for Measure)</i>	Komar, Bob	Phillips, Simon	Attwell, Wendy	Roberts, Daniel	Lucky Strike Productions	Drama	2006
<i>Memos: Closer to the Sun, The</i>	Peterson, Nick	Norwood, Tom	Peterson, Nick	di Rosso, Dolly	EdgeImageBank	Thriller	2003
<i>Mermaid Mushroom, The (aka Il Fungo Sirena)</i>	Archetti, Stefan	Archetti, Stefan	Archetti, Stefan	Bianchini, Agostino	Nine Lives Films	Adventure	2010
<i>Mesocafe</i>	Abd al-Hamid, Ja'far	Abd al-Hamid, Jafar	Abd al-Hamid, Jafar	Alexander, Daphne	Mesocafe	Drama	2011
<i>Messages</i>	Fairman, David	Morrey, Jon	Kinsey, Wayne	Fahey, Jeff	Grosvenor Films	Thriller	2007
<i>Middletown</i>	Kirk, Brian	Casey, Michael	Carville, Daragh	MacFadyen, Matthew	Green Park Films	Drama	2006
<i>Midnight Drives, The</i>	Jenkin, Mark	Harvey, Simon	Jenkin, Mark	Holt, Colin	Midnight Films	Comedy	2007
<i>Midsummer Madness</i>	Hahn, Alexander	Walsh, Steve	Hahn, Alexander	Pinon, Dominique	Steve Walsh Productions	Drama	2007
<i>Midsummer Nightmare 2, A</i>	Wallace, Charles	Wallace, Charles	Wallace, Charles	Moore, Patrick	The Moving Image Company	Horror	2005
<i>Miles Away</i>	McNamee, Brendan	McNamee, Brendan	McNamee, Brendan	Larkin, Bryan	Blunt Films	Adventure	2009
<i>Mind of her Own, A</i>	Jones, Owen Carey	Jones, Owen Carey	Jones, Owen Carey	Talacko, Nicky	Carey Films	Drama	2006
<i>Mind the Gap</i>	Munshi, Abdullah	Munshi, Abdullah	Moss, Cassandra	Cayatte, Simao	DDP Films	Drama	2006
<i>MindFlesh</i>	Pratten, Robert	Pratten, Robert	Pratten, Robert	Bramhill, Peter	Zen Films	Horror	2008
<i>Mine</i>	Leret, Xavier	Bokhari, Jade	Leret, Xavier	Soteriades, Phoebe	White Fire Films	Drama	2007
<i>Miranda</i>	Munden, Marc	Bowen, Laurence	Young, Rob	Ricci, Christina	Feelgood Fiction	Thriller	2002
<i>Mirror Boy, The</i>	Emelonye, Obi	Campbell, Patrick	Emelonye, Obi	Nnaji, Genevieve	OH Films Ltd UK	Adventure	2010
<i>Mirror Maze</i>	Groizard, Guillermo	Romero, Jose Antonio	Groizard, Guilermo	Collado, Adria	Film and Music Entertainment	Drama	2006
<i>Mischief Night</i>	Woolcock, Penny	Bach, Abi	Woolcock, Penny	Hollis, Kelli	Company Pictures	Comedy	2006
<i>Mission London</i>	Mitovski, Dimitar	Doykov, Ivan	Mitovski, Dimitar	Arana, Tomas	SIA Advertising	Comedy	2010
<i>Monarch</i>	Walsh, John	Walsh, John	Walsh, John	McKenna, T.P.	Walsh Bros. Ltd.	Drama	2000
<i>Money Kills</i>	Murphy, Lee	Openshaw, Luke	Openshaw, Luke	Kerr, Joe	Sheringham Studios Ltd UK	Action	2012
<i>Monitor</i>	Davies, David VG	Davies, David VG	Davies, David VG	Kolesnyk, Yana	Film MA Ltd UK	Horror	2011
<i>Monk3ys</i>	Cullingham, Drew	Fisher, James	Cullingham, Drew	Hurn, Jonnie	Elephant Features	Thriller	2011
<i>Monsters</i>	Edwards, Gareth	Niblo, Allan	Edwards, Gareth	McNairy, Scoot	Vertigo Films	Sci-fi	2010
<i>Moonlight</i>	van der Oest, Paula	Rechsteiner, Emjay	Donck, Carel	van den Broeck, Laurien	Spice Factory	Thriller	2002
<i>Morning Tea</i>	Sebo, Milan	Macaulay, Alex	Sebo, Milan	Brocklehurst, Stephen	Blackbull Productions	Drama	2010
<i>Morris: A Life with Bells on</i>	Akhurst, Lucy	Oldham, Charles Thomas	Oldham, Charles Thomas	Akhurst, Lucy	Twist Films Ltd.	Comedy	2009
<i>Mortus Illumina</i>	Chance	Smith, Robert St-John	Chance	Hooley, Jonathan	The SYLAC Group	Drama	2004
<i>Most Unromantic Man in the World, The</i>	Dimech, Gratian	Lumby, David	Heath, James	Akudolu, Chizzy	Burning Vision Entertainment	Comedy	2006
<i>Mother, The</i>	Michell, Roger	Loader, Kevin	Kureishi, Hanif	Reid, Anne	Free Range Films	Drama	2003
<i>Mothers and Daughters</i>	Conolly, David	Turley, Ben	Davis, Hannah	Blackham, Joan	La Plante Productions	Drama	2004
<i>Moussaka and Chips</i>	Patrick, Danny	Patrick, Danny	Corcoran, Emily	Reid, Mike	Empire Productions	Adventure	2005

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<i>Mouth to Mouth</i>	Murray, Alison	Beresford, Anne	Murray, Alison	Page, Ellen	M2M Films	Drama	2005
<i>Mr. In-Between</i>	Sarossy, Paul	Bajohra, Andreas	Waddington, Peter	Howard, Andrew	Phantom Pictures	Horror	2001
<i>Mr. Right</i>	Morris, Jacqui	Morris, Jacqui	Morris, David	Lance, James Narayannan, Paroshant	Mugshots	Comedy	2009
<i>Mr. Singh & Mrs. Mehta</i>	Bhardwaj, Pravesh	Kumaran, Manu	Bhardwaj, Pravesh		Tarlac Ltd.	Drama	2010
<i>Mrs. Palmfrey at the Claremont</i>	Ireland, Dan	Caplin, Lee	Sacks, Ruth	Plowright, Joan	Claremont Films LLC	Comedy	2005
<i>Mum and Dad</i>	Sheil, Steven	Tmovski, Lisa	Sheil, Steven	Benson, Perry Kaas, Nikolaj Lie	Revolver Entertainment Film and Music Entertainment	Horror	2008
<i>Murk (aka Morke)</i>	Johansen, Jannik	Gammeltoft, Thomas	Jensen, Anders Thomas			Drama	2005
<i>My Angel</i>	Cookson, Stephen	Cookson, Stephen	Cookson, Stephen	Blethyn, Brenda	CKM Entertainments	Family	2010
<i>My Brother Tom</i>	Rotheroe, Dom	Schoenfeld, Carl	Rotherhoe, Dom	Harrison, Jenna	Trijbits Productions	Drama	2001
<i>My Grandparents' Tenant</i>	Schwindt, Grace	Schwindt, Grace	Schwindt, Grace	Lewis, Eleanor	City Projects Ltd UK	Drama	2011
<i>My Kingdom</i>	Boyd, Don	Weisman, Neal	Boyd, Don	Harris, Richard	Close Grip Films	Drama	2001
<i>My Life as a Bus Stop</i>	Finnigan, Duncan	Finnigan, Duncan	Finnigan, Duncan	Stewart, John	Finscotland Productions	Comedy	2008
<i>My Little Angel</i>	Neal, Ice	Brown, Guy Murray	Neal, Ice	Anne, Holly	Soob Productions Ltd UK	Mystery	2011
<i>My Little Eye</i>	Evans, Marc	Finn, Jon	Hilton, David	Regan, Laura	WT2	Horror	2002
<i>My Name is Nobody</i>	Woodruff, Matt	Rishton, Matt	Rishton, Matt	Roy, Neil E	Factor X Films	Drama	2005
<i>My Summer of Love</i>	Pawlikowski, Pawel	Seghatchian, Tanya	Wynne, Michael	Considine, Paddy	Apocalypso Pictures	Romance	2004
<i>Myna</i>	Heron, Thomas	Finn, Clare	Heron, Richard	Davies, Chuck	Muckle Films Film and Music Entertainment	Crime	2006
<i>Mystery of the Wolf</i>	Niemi, Raimo	Lyytkainen, Leila	Vuento, Heilli	Talvisara, Tila Baker, Billie- Suliat		Drama	2006
<i>Mystery Play</i>	Martin, Sean	Martin, Sean	Martin, Sean		891 Filmhouse	Drama	2000
<i>Mystic Masseur, The</i>	Merchant, Ismail	Hafizka, Nayeem	Naipaul, V.S.	Puri, Om	Merchant Ivory	Comedy	2001
<i>Nailing Vienna</i>	English, Jonathan	English, Jonathan	Millen, Mark	Murray, James	Meltemi Entertainment	Crime	2002
<i>Naked August</i>	Thorp, Roger	Brown, Iain	Thorp, Roger	Penny, Adam	Parallel Pictures	Drama	2000
<i>Name (aka Shem)</i>	Roboh, Caroline	Levi, Jerome	Roboh, Caroline	Newman, Ash Tomlinson, Ricky	BIF Productions	Drama	2004
<i>Nasty Neighbours</i>	Isitt, Debbie	Alderson, Christine	Isitt, Debbie		Ipsa Facto Films	Comedy	2000
<i>Nativity</i>	Isitt, Debbie	Jones, Nick	Isitt, Debbie	Freeman, Martin	BBC Films	Comedy	2009
<i>Nature Morte</i>	Burrows, Paul	Derrien, Carole Rastelli-Lewis, Edward	Burrows, Paul	McFadden, Troy	NM Productions Uprising Productions Ltd UK	Horror	2006
<i>Needle in the Hay</i>	Ivanov, Viktor		Slattery-Christy, David	James, Luke		Drama	2011
<i>Negative Equity</i>	Pearson, Guy	Pearson, Guy	Pearson, Guy	Baker, Mark	Thrifty Films	Action	2012
<i>Neil's Party</i>	Pidgeon, Stephen	Lott, Philip	Pidgeon, Stephen	Lucas, Bryn	Twothreefive Pictures	Comedy	2006
<i>Never Enough Thunder</i>	Dempster, Bill	Hanley, Joan	Dempster, Bill	Tripp, Stephanie	No. 8 Fencing Wire Productions Ltd UK Mediabus Industries Ltd.	Comedy	2009
<i>Never Play with the Dead</i>	Kilby, Ray	Dalton, Chris	Fedash, David	Homer, Mark		Horror	2001
<i>Never Quite the Same</i>	Vernon, Paul	Vernon, Paul	Vernon, Paul	Cox, Jo	Twelve Quid Productions	Sci-fi	2008
<i>New Blood</i>	Hurst, Michael	Cowan, Michael	Hurst, Michael	Hurt, John	Applecreek Communications	Action	2000
<i>New City Fighter</i>	North, Russell	Leg, Matt	Leg, Matt	Leg, Matt	New Breed Productions Ltd UK	Action	2011
<i>New Town Killers</i>	Jobson, Richard	Roeg, Luc	Jobson, Richard	Scott, Dougray	Independent	Drama	2008
<i>New Town Original (aka This is Essex)</i>	Ford, Jason	Bird, Terry Williams, Simon Channing	Ford, Jason	Jordan, Elliott Potts, Andrew Lee	New Town Films	Drama	2005
<i>New Year's Day</i>	Krishnamma, Suri		Brown, Ralph	Mearns, Raymond	Alchymie Shared Moment Productions	Drama	2001
<i>Next Time Ned</i>	McCue, Thomas	McCue, Thomas	McCue, Thomas			Comedy	2008
<i>NFA (aka No Fixed Abode)</i>	Rainbow, Steve	Edgar, Justin	Rainbow, Steve	Baladi, Patrick	104 Films Ltd UK	Thriller	2012
<i>Nice Guy</i>	Bergamin, Pascal	Bergamin, Pascal	Clerkin, Cavan	Clerkin, Cavan	Red Bike Films Ltd UK Silly Wee Films Ltd UK	Crime	2011
<i>Night is Day</i>	Coull, Fraser	Dowell, Lindsay	Coull, Fraser	McCredie, Colin	Scanner-Rhodes Productions	Action	2011
<i>Night Junkies</i>	Pearce, Lawrence	Fisher, Dean	Pearce, Lawrence	Alderson, Giles		Horror	2007
<i>Night People</i>	Mead, Adrian	Kerr, Clare	Mead, Adrian	Bryan, Katrina	Mead Kerr Ltd	Drama	2005
<i>Night-Bird</i>	Wilton, Tom	Wilton, Tom	Wilton, Tom	Laurence, David Mackay, Somerset	Bring It Give It Films	Drama	2004
<i>Night-Wolf</i>	Gibson, Kristen	Gibson, Kristen	Storey, David		Galleon Productions	Comedy	2005
<i>Nina's Heavenly Delights</i>	Parmar, Pratibha	Atkins, Chris	Gibb, Andrea	Conn, Shelley	Priority Pictures	Comedy	2006
<i>Nine Days of Hell</i>	Stitt, Martin	Kunze, Julia Hilaire, Larnia	Quershi, Farhan	Larwood, Marek	Sprig Productions	Thriller	2002
<i>Nine Dead Gay Guys</i>	Mo, Lab Ky	Nayeb-St.	Lab, Ky Mo	Mulhern, Glen	Little Wing Films	Comedy	2002
<i>Nine Lives</i>	Green, Andrew	Green, Andrew	Green, Andrew	Warner, Amelia	A&A Films	Thriller	2002
<i>Nine Lives of Tomas Katz, The</i>	Hopkins, Ben	Hewitt, Caroline	Browne, Thomas	Fisher, Tom	G2 Films	Comedy	2000

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<i>Nine Steps to a New Start</i>	Wagstaff, Neil	Price, Samantha	Wagstaff, Neil	Bailey, Scott	Left	Drama	2005
<i>No 7 Welcome to London</i>	Shan, Asad	Khangura, Pixie	Lyer, Manju	Shan, Asad	Iconic Productions Ltd UK	Drama	2012
<i>No Man's Land</i>	Tanovic, Danis	Baschet, Marc	Tanovic, Danis	Djuric, Branko	Man's Films	Comedy	2001
<i>No Place</i>	Davies-Frayne, Clive	O'Brien, Steve	O'Brien, Steve	Turnbull, Rob	24:25 Films	Drama	2005
<i>Nobody the Great</i>	Miller, Kara	Miller, Kara	Miller, Kara	Head, Peter	Arawak Films	Comedy	2007
<i>Nobody's Hero</i>	Lehel, Jason	Randall, Esther	Lehel, Jason	Furtado, Nelly	Open Eye Productions	Drama	2006
<i>Non Compos Mentis (aka Not of Sound Mind)</i>	Ellis, John	Holliman, Carrie	Ellis, John	Brooklyn, Chris	Sirius Pictures	Horror	2003
<i>Not Afraid, Not Afraid</i>	Carducci, Annette	Carducci, Annette	Carducci, Annette	Davenport, Jack	Fearless Films Limited	Drama	2001
<i>Not Alone (aka Ellie Rose: When the past is better left buried)</i>	Versluis, Tristan	Thompson, Andy	Versluis, Tristan	Benjamin, Lucy	Dead on Arrival Digital Ltd UK	Horror	2010
<i>Notebooks of Cornelius Crow, The</i>	Martin, Sean	Elford-Argent, Douglas	Mark, Nicholas	Brown, Adso	30 Something Productions	Thriller	2005
<i>Novelist, The</i>	Young, Jason	Young, Jason	Young, Jason	Buckingham, Clare	Clapham South Productions	Drama	2009
<i>Nowhere Boy</i>	Taylor-Wood, Sam	Bernstein, Robert	Greenhaigh, Matt	Johnson, Aaron	Ecosse Films	Biography	2009
<i>Number One, Longing, Number Two, Regret</i>	Wassell, Neil	Wassell, Neil	Wassell, Neil	Agutter, Jenny	World on Fire Production	Thriller	2004
<i>O Coro</i>	Schumann, Werner	Schumann, Werner	Schumann, Werner	Barato, Paulo	Schumann Brothers	Drama	2010
<i>Occasional Monsters</i>	Addison, Sam	Addison, Sam	Addison, Sam	McMillan, Marcus	Donside Pictures	Comedy	2008
<i>Off We Go Then</i>	Paterson, Ian	Eyers, Geoff	Paterson, Ian	Kernohan, Michelle	Superteam Films	Comedy	2008
<i>Offending Angels</i>	Rajan, Andrew	Fink, Stanley	Rajan, Andrew	Harker, Susannah	Pants Productions Limited	Comedy	2000
<i>Oh Happy Day</i>	Poitier, Ian	Cooper, Brian	Poitier, Ian	Colquhoun, Christopher	Oh Happy Day Productions Limited	Comedy	2007
<i>Ollie Kepler's Expanding Purple World</i>	Fongenie, Viv	Fongenie, Viv	Fongenie, Viv	Hogg, Edward	Fruitcake Films	Drama	2010
<i>On The Ropes</i>	Taha, Hamdy	Taha, Hamdy	Noyce, Mark	Egan, Joe	Ink Pixel Films	Comedy	2011
<i>Once There Was A Girl</i>	Osborne, Dominic	Osborne, Dominic	Osborne, Dominic	Cox, Simon	Freeform Films	Drama	2007
<i>Once Upon a Time in the Midlands</i>	Meadows, Shane	Calderwood, Andrea	Meadows, Shane	Carlyle, Robert	Slate Films	Comedy	2002
<i>One</i>	Brown, Robbie	Brown, Robbie	Brown, Robbie	Graves, Ben	Distracted	Drama	2008
<i>One Day Removals</i>	Stirton, Mark	Fraser, Ken	Stirton, Mark	Wight, Patrick	Stirton Productions	Comedy	2008
<i>One For the Road</i>	Cooke, Chris	Ogborn, Kate	Cooke, Chris	Procter, Rupert	One For the Road Films	Comedy	2003
<i>One Last Chance (aka The Bum's Rush)</i>	Svaasand, Stewart	Karlsen Orjan	Svaasand, Stewart	Sives, Jamie	Hero Film Productions Ltd	Comedy	2004
<i>One Life Stand</i>	Thomas, May Miles	Smyth, Karen	Thomas, May Miles	Carr, Maureen	Elemental Films	Drama	2000
<i>One Love</i>	Elgood, Rick	Deutschman, Yvonne	Rhone, Trevor	Marley, Ky-mani	One Love Films	Drama	2003
<i>One Minutes</i>	Pugh, Philip	Pugh, Philip	Pugh, Philip	Adams, Lydia	Philip Pugh Films	Comedy	2009
<i>One Night in Powder</i>	Attar, Jason	Wimborne, Danny	Attar, Jason	Powder, Kevin	One Light Productions Ltd UK	Comedy	2011
<i>One Thick Second</i>	Pugh, Will	Wyatt, Chloe	Pugh, Will	Webb, Jon	Anxiety8	Drama	2000
<i>One Way Love</i>	Johnston-Lynch, Chase	Mitchell, Nicola	Johnston-Lynch, Chase	Cole, Steven	PIDGIN Productions	Romance	2005
<i>Only Boy for Me, The</i>	Humphreys, Dewi	Scott, Ann	Wallington, Mark	Baxendale, Helen	Greenpoint Films	Comedy	2006
<i>Only Hotel, The</i>	Collinge, Stuart	Clements, Francis	Collinge, Stuart	Budlong, Danielle	Globocine International Pictures	Drama	2003
<i>Oracle, The</i>	Maxwell, Shamus	Maxwell, Shamus	Maxwell, Shamus	Bishop, Kate	Cruellest Month Ltd UK	Fantasy	2010
<i>Other Half, The</i>	Nockles, Richard	Whittome, Tiffany	Nockles, Richard	Dyer, Danny	Piper Films	Comedy	2006
<i>Other Possibility, The</i>	Horner, Ashley	Mitchell, Michael	Dillon, Peter	Hodgson, Michael	Pinball Films	Drama	2007
<i>Other Side of the Game</i>	Akyuz, Savas	Akyuz, Savas	Akyuz, Savas	Sutton, Simon Paul	Splitwigs	Action	2010
<i>Ouija Board, The</i>	Stone, Matthew J	Stone, Matthew J	Stone, Matthew J	Smithers, Nick	Thunder Films	Horror	2009
<i>Out of Depth</i>	Marshall, Simon	Cranny, Stephen	Marshall, Simon	Maquire, Sean	Steon Films Ltd.	Thriller	2000
<i>Out on a Limb</i>	Heath, Robert	Mellins, Joy	McCabe, Bob	Goodman, Henry	Theta Films	Comedy	2005
<i>Outcast</i>	McCarthy, Colm	Dick, Eddie	McCarthy, Tom	Dickie, Kate	Fantastic Films	Horror	2010
<i>Outlanders</i>	Lees, Dominic	Riley, Michael	Gardner, Jimmy	Tolak, Jakub	Sterling Pictures	Action	2007
<i>Outlaw</i>	Love, Nick	Niblo, Allan	Love, Nick	Bean, Sean	Vertigo Films	Action	2007
<i>Outpost</i>	Barker, Steve	Croft, Arabella	Brunton, Rae	Stevenson, Ray	The Black Camel Picture Company	Action	2008
<i>P.O.V. (aka Point of View)</i>	Manning, Lesley	Manning, Lesley	Walker, Andy	Boardman, Lee	Parallel Pictures	Romance	2000
<i>Paddy Lincoln Gang, The</i>	Jagger, Ben	Jagger, Ben	Audsley, Alistair	Jagger, Dean S	Belief Films Ltd UK	Drama	2012
<i>Page Eight</i>	Hare, David	Barron, David	Hare, David	Nighy, Bill	Heyday Films	Mystery	2011
<i>Panic Button</i>	Crow, Chris	Shackleton, John	Crow, Chris	Johnson, Scarlett Alice	Movie Mogul Films Ltd UK	Horror	2011
<i>Pantomine</i>	Ball, Graham	Ball, Graham	Ball, Graham	Penny, Brett	S-I-A Films	Comedy	2004

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<i>Paradise Grove</i>	Harris, Charles	Castro, David	Harris, Charles	Moody, Ron	Paradise Grove	Comedy	2003
<i>Paranoid</i>	Duigan, John	Trijbits, Paul	Duigan, John	Alba, Jessica	Sky Pictures	Thriller	2000
<i>Parasite</i>	Prendergast, Andrew	Kingsley, Chris	Stacey, Richard	Condes, Gary	Fearth Production	Horror	2004
<i>Paris 60</i>	Ukpo, Tony Sebastian	Kaiba, Sebastian	Ukpo, Tony Sebastian	Gajda, Damien	Vertigoheights Film	Drama	2010
<i>Paris Skylight</i>	Southouse, Stephen	Southouse, Stephen	Southouse, Stephen	Fredericks, Joe	Zelica Films	Drama	2002
<i>Park it Right</i>	Okoh, Donny Kingsley	Okoh, Donny Kingsley	Okoh, Donny Kingsley	Walker, Clinton	Don Ebony Productions Ltd UK	Comedy	2011
<i>Parkside Hell House</i>	White, James	Murray, Caroline L	White, James	Mulheron, Tiffany	Hard House	Horror	2008
<i>Party, The</i>	Chowdhury, Mikail	Chowdhury, Mikail	Chowdhury, Mikail	Bettiss, Chris	Spontinuity Productions	Drama	2002
<i>Passengers</i>	Hales, John	Turner, Richard	Hales, John	Popplewell, Anna	Ratio Films Ltd UK	Thriller	2012
<i>Past Present Future (Imperfect)</i>	Thorp, Roger	De Beaujeu, Guy	De Beaujeu, Guy	Frazer, Rupert	Fluidity Films	Drama	2004
<i>Pasty Faces</i>	Baker, David	Waddell, Alasdair	Baker, David	Baker, David	Noel Gay Motion Picture Company	Comedy	2000
<i>Patagonia</i>	Evans, Marc	Gilbertson, Rebekah	Evans, Marc	Rhys, Matthew	Rainy Day Films	Drama	2010
<i>Patient 17</i>	Le, Tuyet	Le, Tuyet	Le, Tuyet	Waterman, Hannah	Patient 17 Ltd.	Horror	2011
<i>Payback Season</i>	Donnelly, Danny	Adams, John	Donnelly, Danny	Deacon, Adam	Pure Film Productions Ltd UK	Thriller	2012
<i>Peacefire</i>	Vallely, Macdara	Martin, Chris	Vallely, Macdara	Travers, John	Mayfly Entertainment	Drama	2008
<i>Peaches</i>	Grosso, Nick	Glennane, Ronan	Grosso, Nick	Rhys, Matthew	Stoneridge Entertainment	Comedy	2000
<i>Pelican Blood</i>	Golden, Karl	Rae, Douglas	Cole, Cris	Treadaway, Harry	Ecosse Films	Drama	2009
<i>Penalty King, The</i>	Cook, Chris	Bowden, Charlie	Cook, Chris	Grogan, Clare	Maverik Motion Pictures	Comedy	2006
<i>Penetration Angst</i>	Buld, Wolfgang	Coe, Nick	Buld, Wolfgang	Conway, Paul	Dark Black Films	Comedy	2003
<i>Peppermint</i>	Morton, Gabby	Fair, James	Fair, James	Oliver, Jennifer	Grand Independent	Drama	2005
<i>Perfect Burger, The</i>	Carty, Todd	Mills, Paul	Huntrods, James	Allen, Lindsay	Co-operative British Youth Film Academy	Horror	2010
<i>Perfect Parents</i>	Ahearne, Joe	Cauverien, Nicole	Ahearne, Joe	Eccleston, Christopher	ITV Productions	Drama	2006
<i>Perfect Woman</i>	Groves, Deborah	Bell, James E	Snape, Sam	Bourret, Caprice	Olympus Productions	Horror	2007
<i>Pets</i>	Lister, David	Matthews, Elizabeth	Atkins, Christopher	Evigan, Greg	Peakviewing	Comedy	2000
<i>Pharmacist, The</i>	Boetticher, Patrick	Dalton, Tom	Boetticher, Patrick	Gould, Liana	Texture Films Ltd UK	Drama	2012
<i>Phoenix Blue</i>	Maylam, Tony	Hayley, Keith	Maylam, Tony	Donohoe, Amanda	Little Wing Films	Thriller	2001
<i>Photo Finish</i>	McFerran, Douglas	Douglas, Christopher	McFerran, Douglas	Gillen, Aidan	S Films	Drama	2003
<i>Photoshoot</i>	Sutherland, Mairi Fraser	Sutherland, Mairi Fraser	Sutherland, Mairi Fraser	Altman, John	Palm Tree Productions	Thriller	2009
<i>Piano Tuner of Earthquakes, The</i>	Quay, Timothy	Griffiths, Keith	Quay, Timothy	Casar, Amira	Koninck Studios	Drama	2005
<i>Piece of Cake</i>	Lario, Elena	Azabal, Alex	Lario, Elena	Bisson, Christopher	London Film Lab	Comedy	2004
<i>Piercing Brightness</i>	Dawood, Shezad	Parker, Kate	Dawood, Shezad	Brabin, Tracy	Ubik Productions Ltd UK	Sci-fi	2012
<i>Pimp</i>	Cavanah, Robert	de Vos, Paul	Kirby, Jon	Dyer, Danny	Coppola Productions	Thriller	2010
<i>Plague, The</i>	Hall, Greg	Finlay-Hall, Rebecca	Hall, Greg	Anokye, Samuel	Prodigal Productions	Drama	2005
<i>Planet, The</i>	Stirton, Mark	Clark, Mark	Stirton, Mark	Mitchell, Mike	Stirton Productions	Sci-fi	2006
<i>Plans of Man, The</i>	BernSousa, Rachael	BernSousa, Rachael	BernSousa, Rachael	Loxton, Dean	Human Flower Films	Drama	2007
<i>Plato's Breaking Point</i>	Barker, Nigel	Barker, Nigel	Roffe, David	Ferrera, Joe	Robark Pictures	Drama	2002
<i>Playground Logic</i>	Sanger, Matthew	Sanger, Matthew	Sanger, Matthew	Fisher, James	Bent Films	Comedy	2004
<i>Playing the Moldovans at Tennis</i>	Jarozewicz, Mikolaj	Hawks, Tony	Hawks, Tony	Hawks, Tony	Tony Hawks Productions Ltd UK	Comedy	2012
<i>Point of Regret, The</i>	Tate, Simon	Tate, Simon	Tate, Simon	Nicol, A J	Emanation Films Ltd UK	Thriller	2011
<i>Poor Wee Me</i>	Powell, Simon	Powell, Simon	Powell, Simon	Antley, Lee	Friday Night Films Limited	Drama	2010
<i>Popcorn</i>	Fisher, Darren	San, Daniel	Fisher, Darren	Ryder, Jack	DMS Films	Comedy	2007
<i>Power of Three, The</i>	Deutschman, Yvonne	Snyman, Thereza	Cameron, Ann	Willcox, Toyah	Power of 3 Productions Ltd UK	Comedy	2011
<i>Powerless</i>	Daniels, Matt	Daniels, Matt	Daniels, Matt	Wilkins, Bethany	This Can Motion Pictures	Drama	2004
<i>Pride of Manchester</i>	Quinn, Craig	Quinn, Craig	Quinn, Craig	Muldoon, Ryan	Momentary Revolution Entertainment Ltd UK	Drama	2012
<i>Principles of Lust, The</i>	Woolcock, Penny	Baptiste, Madonna	Woolcock, Penny	Newman, Alec	Blast Films	Drama	2003
<i>Prodigal, The</i>	Sampays, Ben	Morrey, Jon	Edwards, Paul	Quinn, Kevin	Tiger Films Limited	Drama	2002
<i>Project: Brainstorm</i>	Tizzard, Rob	Tizzard, Rob	Tizzard, Rob	Noble, James Daniel	Megropolis Productions Ltd.	Sci-fi	2004
<i>Promoted to Glory</i>	Spence, Richard	Trodd, Kenith	Heyland, Rob	Stott, Ken	Talkback Thames Television	Drama	2003
<i>Psychosis (aka Vivid)</i>	Traviss, Reg	Fischer, Patrick	Traviss, Reg	Carpenter, Charisma	Kingsway Films Ltd UK	Horror	2010
<i>Psychosomatic</i>	Tanner, Andrew Charles	Tanner, Andrew Charles	Tanner, Andrew Charles	Harper, Dawn	Shine Productions	Thriller	2008

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<i>Pub Crawl</i>	McGeough, Henry	McGeough, Henry	McGeough, Henry	Acton, Leigh	555 Films	Drama	2011
<i>Puckoon</i>	Ryan, Terence	Ryan, Terence	Ryan, Terence	Hughes, Sean	Distinguished Feature	Comedy	2002
<i>Pulp</i>	Hamdy, Adam	Bland, Phil	O'Toole, Bode	Sutherland, Jay	Dare Productions	Comedy	2012
<i>Pumpgirl</i>	Moore, Carol	Parr, Chris	Spallen, Abbie	Murphy, Gerard	PG Productions	Drama	2009
<i>Purely Belter</i>	Herman, Mark	Karlsen, Elizabeth	Herman, Mark	Beattie, Chris	FilmFour	Comedy	2000
<i>Purifiers, The</i>	Jobson, Richard	Atkins, Chris	Jobson, Richard	Monaghan, Dominic	Bill Kenwright Films	Action	2004
<i>Puritan</i>	Hajaig, Hadi	Hajaig, Hadi	Hajaig, Hadi	Moran, Nick	Parliament Films	Drama	2005
<i>Quality Indigo</i>	Grewal, Jaspreet	Grewal, Jaspreet	Grewal, Jaspreet	Jakeman, Frank	Troubled Children Films	Action	2005
<i>Quarry Men, The</i>	White, Toby	White, Toby	White, Toby	Henderson, Craig	Gangster Pictures	Drama	2000
<i>Rabbit Fever</i>	Denyer, Ian	Heinman, Matt	Raphael, Stephen	Rhind-Tutt, Julian	Rabbit Reproductions Ltd	Comedy	2006
<i>Radio London Movie</i>	Malik, Rehan	Hady, Leon	Malik, Rehan	Hady, Zaid El	European Broadcast Ltd UK	Horror	2011
<i>Rag Tag</i>	Nwandu, Adaora	Nwandu, Uzoamaka	Nwandu, Adaora	Parsons, Danny	Muka Flicks Ltd	Drama	2006
<i>Rage</i>	Potter, Sally	Sheppard, Christopher	Potter, Sally	Law, Jude	Adventure Pictures	Drama	2009
<i>Raindogs (aka Rain Dogs)</i>	Moffat, Robbie	Sutherland, Mairi	Moffat, Robbie	Matheson, James	Palm Tree UK	Adventure	2004
<i>Randall's Flat</i>	Atkins, Chris	Atkins, Chris	Atkins, Chris	Broome, Peter	Stage to Screen	Drama	2001
<i>Random 11</i>	Ukpo, Tony Sebastian	Ukpo, Tony Sebastian	Ukpo, Tony Sebastian	Abe, Haruka	Vertigo Heights Film Ltd UK	Crime	2011
<i>Rapture, The</i>	Steel, William	Steel, William	Steel, William	Dyer, Danny	A Rapture Film Production Limited	Mystery	2010
<i>Re-evolution</i>	Walkington, Andrew	Mills, Paul	Warburton, John	Blessed, Brian	The Co-operative British Youth Film Academy	Horror	2011
<i>Re-inventing Eddie</i>	Doyle, Jim	Brady, Ian	Brady, Ian	Lynch, John	Great British Films	Comedy	2002
<i>Really</i>	Mitelpunkt, Daniel	Mitelpunkt, Daniel	Mitelpunkt, Daniel	Bushell, Kirst	Day For Night Films	Drama	2006
<i>Rebels Without a Clue</i>	Vernon, Ian	Vernon, Ian	Vernon, Ian	Barnett, Rik	Biffa Productions Ltd. UK	Comedy	2010
<i>Red Fruit</i>	Cripps, Jonny	MacMillan, Alex	Cripps, Jonny	Cripps, Jonny	Zografia Films	Drama	2007
<i>Red Mist (aka Freakdog)</i>	Breathnach, Paddy	Bosanquet, Simon	Wright, Spence	Kebbel, Arielle	Generator Entertainment	Horror	2008
<i>Red Road</i>	Arnold, Andrea	Comerford, Carrie	Arnold, Andrea	Dickie, Kate	Sigma Films	Drama	2006
<i>Red Rose</i>	Moffat, Robbie	Sutherland, Mairi	Sutherland, Mairi	Rodgers, Michael	Palm Tree UK	Drama	2004
<i>Red White and Blue</i>	Rumley, Simon	Portal, Bob	Rumley, Simon	Fuller, Amanda	Rumleyvision	Horror	2010
<i>Redemption Road</i>	Stanton, Lloyd	Cookson, Steve	Stanton, Lloyd	Stanton, Lloyd	Spice Factory	Drama	2001
<i>RedMeansGo</i>	Dunton, Erica	Gosling, Simon	Dunton, Erica	English, Corri	Enjoy Films	Drama	2005
<i>Reeds, The</i>	Cohen, Nick	Sprackling, Simon	Galluzzo, Mark	Brewster, Anna	Delacheroy Films	Horror	2010
<i>Refuge</i>	Jashanmal, Narain	Jagtiani, Micky	Jashanmal, Narain	Choudhury, Sarita	Park and 60 Seconds Productions	Drama	2002
<i>Release</i>	Flaxstone, Darren	Martin, Christian	Flaxstone, Darren	Flaxstone, Darren	FAQS Limited	Drama	2010
<i>Resistance</i>	Gupta, Amit	Faber, Amanda	Sheers, Owen	Sheen, Michael	Big Rich Films	Drama	2011
<i>Resurrection</i>	Hawkins, Jack	Hawkins, Jack	Phelps, Andy	Colvin, Eric	Charmed Apocalypse Pictures Ltd UK	Horror	2011
<i>Retreat</i>	Tibbetts, Carl	Sinyor, Gary	Hallett, Janice	Murphy, Cillian	Magnet Films	Thriller	2011
<i>Retribution</i>	Aynsley, Maz	Holland, Victoria	Aynsley, Maz	Brake, Richard	PPP Films	Crime	2007
<i>Retribution (aka The Ticking Man 2)</i>	Simpson, Steven Lewis	Simpson, Steven Lewis	Simpson, Steve Lewis	Lochburn, Peter	Roaring Fire Film Production	Thriller	2004
<i>Reuniting the Rubins</i>	Factor, Yoav	Factor, Yoav	Factor, Yoav	Mitra, Rhona	Factor Films	Comedy	2010
<i>Revenge</i>	Little, Bill	Little, Bill	Little, Bill	Mitchell, Mike	Scot Films International	Action	2010
<i>Revenge: The Movie</i>	Little, Bill	Little, Bill	Little, Bill	Mitchell, Mike	Scot Films Ltd UK	Action	2011
<i>Revergers Tragedy</i>	Cox, Alex	Matheson, Margaret	Cottrell-Boyce, Frank	Izzard, Eddie	Bard Entertainments	Drama	2002
<i>Reverb</i>	Arrusi, Eitan	Mannion, Frank	Arrusi, Eitan	Birhistle, Eva	Swipe Films	Horror	2008
<i>Reverend, The (aka New Awakenings)</i>	Jones, Neil	Brennan, Stuart	Brennan, Stuart	Hassan, Tamer	Burn Hand Films Ltd UK	Comedy	2011
<i>Reykjavik Whale Watching Massacre</i>	Kemp, Julius	Thurdarson, Ingvar	Sigurdsson, Sjon	Hennessy, Miranda	Solar Films	Horror	2009
<i>Rhythm & Blues</i>	Lennhoff, Stephen	Winters, David	Lennhoff, Stephen	Blackthorne, Paul	Life on Mars Ltd.	Musical	2000
<i>Right Hand Drive</i>	Kalbskopf, Mark	Crosscup, Debbie	Kalbskopf, Mark	Lumley, Nicholas	Pine Road Pictures	Comedy	2009
<i>Riot on Redchurch Street</i>	Miller, Trevor	Tottingham, Stephen	Miller, Trevor	Hazeldine, Sam	1234 Films Ltd UK	Drama	2012
<i>Rise of the Footsoldier</i>	Gilbey, Julian	Loveday, Mike	Gilbey, Julian	Harnett, Ricci	Carnaby International	Action	2007
<i>Rising Tide</i>	Furness, Dawn	Shotton, Philip	Furness, Dawn	Roxby, Isolde	Rising Tide Productions	Thriller	2011
<i>Rising Tide (aka Screaming Demons)</i>	Furness, Dawn	Shotton, Philip	Shotton, Philip	Cardy, Ileana	Rising Tide Productions Ltd UK	Horror	2011
<i>Rituals of Fire</i>	Aryeetey, Joel	Brumey, David	Aryeetey, Joel	Lee, Joyce	LJ Pictures	Drama	2000

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<i>Road to Guantanamo, The</i>	Winterbottom, Michael	Eaton, Andrew	Winterbottom, Michael	Harun, Farhad	Revolution Films	Drama	2006
<i>Roanoke: The Lost Colony</i>	Stephens, Bertie	Stephens, Bertie	Robert, Shane	Courtney, Andy	BSDS Productions	Drama	2007
<i>Room 36</i>	Groom, Jim	Dennison, Tim	Dennison, Tim	Herzberg, Paul	Ivory Tower Entertainment	Comedy	2005
<i>Room to Rent</i>	El Hagar, Khaled	Kemeny, Ildiko	El Hagar, Khaled	Taghnaoui, Said	Renegade Films	Comedy	2000
<i>Rose (aka Rose the Feature Film)</i>	Yildirim, Kemal	Yildirim, Kemal	Loveless, Stephen	Clifford, Helen	Rose The Film Ltd UK	Drama	2012
<i>Rosetta: Prima Donna Assoluta</i>	Barker, Kenneth D	Grierson, Roy	Barker, K D	Graham, Louise	Water on the Rocks Limited	Drama	2003
<i>Rough and Ready III (aka Rough and Ready I, Rough around the Edges)</i>	Dickinson, Jim	Dickinson, Granville	Dickinson, Jim	Mitchell, Mike	Big Cheese Films	Comedy	2011
<i>Rough Around the Edges</i>	Dickinson, Jim	Hinchliffe, Jess	Foster, Campbell	Ahmed, Zahir	Big Cheese Films	Comedy	2009
<i>Round Ireland with a Fridge</i>	Bye, Ed	Sharkey, Simon	Hawks, Tony	Basham, John	Fridge d'Or Films	Comedy	2010
<i>Roundabout, The</i>	Wilson, Daniel	Martin, Alex	Martin, Alex	Brown, Spencer	The Roundabout Movie Ltd UK	Horror	2012
<i>RU-486 - The Last Option</i>	Maffei, Irene	Webster, Eliot	Webster, Eliot	Badran, Zina	Xylomancy Films Ltd UK	Drama	2010
<i>Ruadhan the Bard</i>	Chambers, Jamie	Barrett, James	Pete, Robyn	Maclean, Norman	Transgressive North	Drama	2012
<i>Ruby Blue</i>	Dunn, Jan	Wickham, Elaine	Dunn, Jan	Hoskins, Bob	Medb Films	Drama	2007
<i>Rulers and Dealers</i>	Jackson, Stephen Lloyd	Jackson, Stephen Lloyd	Jackson, Stephen Lloyd	Anderson, Terrence	RDL Productions	Drama	2005
<i>Run, The</i>	Meneguzzi, Tania	Meneguzzi, Tania	Meneguzzi, Tania	Weaver, Alexandra	ZZ Productions	Drama	2008
<i>Running in Traffic</i>	Corlett, Dale	Twynholm, Marc	Larkin, Bryan	Larkin, Bryan	Dabhand Films	Drama	2009
<i>Rupert Brockstein's 'Blood Red Letters'</i>	Tyrone, Nick	Tyrone, Nick	Tyrone, Nick	Faulkner, Giles	Solarmonite Productions	Drama	2008
<i>S.N.U.B.</i>	Glendenning, Jonathan	Adams, John	Adams, John	Mavers, Gary	Angry Badger Pictures	Horror	2009
<i>Sacrificed</i>	Bradley, Keith	Bradley, Keith	Bradley, Keith	Darnell, Sandra	Thinktank Productions	Horror	2008
<i>Saltwater</i>	McPherson, Conor	Walpole, Robert	McPherson, Conor	McDonald, Peter	BBC Films	Drama	2000
<i>Salvage</i>	Gough, Lawrence	Lau, Julie	Gough, Lawrence	Andrews, Dean	Hoax Films	Horror	2009
<i>Sam Jackson's Secret Video Diary</i>	Rowland, Guy	Rowland, Guy	Rowland, Guy	Miller, Posy	Molehill Productions Ltd	Drama	2005
<i>Sanitarium</i>	Roberts, Johannes	Eaves, James	Roberts, Johannes	Minns, Jeremy	Catcage Pictures	Horror	2001
<i>Saxon</i>	Loftin, Greg	Valmorbida, Elise	Loftin, Greg	Harris, Sean	Sillwood Films Ltd.	Comedy	2007
<i>Scandalous Four, The</i>	van Wijk, Christianne	van Wijk, Christianne	Hills, Samantha	Butler, Chris	Art of Life Films Ltd UK	Period	2010
<i>Scar Crow, The</i>	Thompson, Andy	Thompson, Andy	Thompson, Andy	Tolputt, Anna	Gaia Media Management Ltd.	Horror	2009
<i>Scar Tissue</i>	Michell, Scott	Riley, Michael	Michell, Scott	George, Helen	Tall Man Films Ltd UK	Mystery	2012
<i>Scenes of a Sexual Nature</i>	Blum, Edward	Blum, Edward	Ditta, Aschlin	Aird, Holly	Tin Pan Films	Comedy	2006
<i>School that Roared, The</i>	Walkington, Andrew	Caunt, Richard J.	Warburton, John	Bradbury, Tom	Co-operative British Youth Film Academy	Comedy	2009
<i>Schrodinger's Girl (aka Triple Hit)</i>	Bowen, Huw	Bowen, Huw	Bowen, Huw	Tartelin, Abigail	Entanglement Productions	Sci-fi	2009
<i>Scopia</i>	Butler, Christopher	Flynn, Steven	Butler, Christopher	Ignaczewska, Joanna	The Flynn Film Company	Action	2011
<i>Scouting Book for Boys</i>	Harper, Tom	Mackinnon, Ivana	Thorne, Jack	Turgoose, Thomas	Celador Films	Drama	2009
<i>Screaming out Silently</i>	McDermott, Mark	McDermott, Mark	McDermott, Mark	McDermott, Mark	Tosh Pictures	Drama	2002
<i>Sea of Madness</i>	Knudsen, Erik	Knudsen, Janet	Knudsen, Erik	Fallon, Amy	One Day Films	Drama	2006
<i>Seachd - The Inaccessible Pinnacle</i>	Miller, Simon	Young, Christopher	Cockwell, Jo	Caimbeul, Aonghas	Young Films	Drama	2007
<i>Seamonsters</i>	Kerridge, Julian	Gordon, Angela	Sadofski, Martin	Tushingham, Rita	Orange Trousers	Drama	2011
<i>Search for John Gissing, The</i>	Binder, Mike	Binder, Mike	Binder, Mike	Binder, Mike	Dyno-B Films	Comedy	2001
<i>Season of Mists (aka Sezon Tumanov)</i>	Tchernakova, Anna	McCartney, Neil	Tchernakova, Anna	Blake, Marina	Kinoglaz	Drama	2009
<i>Season of the Witch, The</i>	Goddard, Peter	Coffey, Daniel	Goddard, Peter	Kingston, Beth	Devils Avalanche Films Ltd UK	Thriller	2009
<i>Second Generation</i>	O'Sullivan, Shane	Kellett, Jack	O'Sullivan, Shane	Yutani, Shigetomo	Second Generation Films	Drama	2000
<i>Secrets</i>	Yildirim, Kemal	Yildirim, Kemal	Yildirim, Kemal	Clifford, Helen	Knight Productions 2000 Ltd UK	Drama	2011
<i>See You at the Altar</i>	Thomas, Victoria	Rochester, Joan	Thomas, Victoria	Convy, Al	Yolo International	Drama	2006
<i>Seeing Heaven</i>	Powell, Ian	Risan, Anton Z	Powell, Jan	Bracq, Alexander	Magic Mask Pictures Limited	Drama	2010
<i>Seeing Smoke</i>	Mortimer, Glen	Maloney, Patrick	Mortimer, Glen	Ryan, Emma	Ultimate Films	Drama	2009
<i>Self Made</i>	Wearing, Gillian	Russo, Lisa Marie	Wearing, Gillian	Rumbelow, Sam	Fly Film Production Ltd UK	Drama	2011
<i>Senseless</i>	Hynd, Simon	Thomas, Nigel	Hynd, Simon	Behr, Simon	Matador Pictures	Thriller	2007
<i>Senses</i>	Nebot, Norma	Coop, Adam	Nebot, Norma	Earl, Vanessa	London Film School	Drama	2003
<i>Set Piece</i>	Goddard, Peter	Ruskin, Victoria Grace	Goddard, Peter	Cotter, Nila	Devils Avalanche Films Ltd UK	Drama	2009
<i>Seven Crosses</i>	Moffat, Robbie	Moffat, Robbie	Moffat, Robbie	Kendall, Suzanne	Palm Tree Productions	Thriller	2008
<i>Seven Deadly Sins</i>	Reid, Steve	Reid, Steve	Reid, Steve	Wade, Dave	Doc Redeye Productions	Musical	2003

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<i>Seven Games</i>	Elliott, Mark	Taylor, Elaine	Williams, Jeff		Thrilanfere Limited	Comedy	2005
<i>Seven Seconds to Heaven</i>	Lindsay, Caleb	Shonteff, Alex	Lindsay, Caleb	Fisher, James	Acid Films Limited	Thriller	2008
<i>Sex and Drugs and Rock and Roll</i>	Whitecross, Mat	Jones, Damian	Viragh, Paul	Serkis, Andy	DJ Films	Biography	2010
<i>Sex Lives of the Potato Men</i>	Humphries, Andy	Overland, Anita	Humphries, Andy	Vegas, Johnny	Devotion Films	Comedy	2004
<i>Shades of a Killer</i>	Yildirim, Kemal	Yildirim, Kemal	Yildirim, Kemal	Amar, Mohammad	Knight Productions 2000 Ltd UK	Action	2011
<i>Shaking Dream Land</i>	Nagel, Martina	Moss, Katrina	Clifford, Ann	Winchester, Philip	Eagle Films	Drama	2006
<i>Shank</i>	Pearce, Simon	Martin, Christian	Falaxstone, Darren	Virgo, Wayne	FAQs	Drama	2009
<i>Shank</i>	Ali, Mo	Stone, Terry	Van Carter, Paul	Williams-Stirling, Kedar	Gunslinger	Action	2010
<i>Shell Shock</i>	Price, James	Sohanpal, Mani	Price, James	Whitelock, Robert	Pixie Films Limited	War	2009
<i>Shifty</i>	Creevy, Eran	Aitken, Rory	Creevy, Eran	Ahmed, Riz	Between the Eyes	Drama	2008
<i>Shimkent Hotel</i>	de Meaux, Charles	Donaldson, Gil	de Meaux, Charles	Collette, Yann	Donaldson Polakoff Productions Ltd	Horror	2003
<i>Shirley Adams</i>	Hermanus, Oliver	Nathan, Jeremy	Hermanus, Oliver	Newman, Denise	DV8 Films	Drama	2009
<i>Shoot the DJ</i>	Peters, Dan	Vincent, Sean J	Vincent, Sean J	Vincent, Sean J	Sonic-Hub Records Ltd UK	Drama	2010
<i>Shooters</i>	Teague, Colin	Bone, Margery	Dempsey, Louis	Dunbar, Adrian	Catapult Productions	Crime	2002
<i>Shooting Magpies</i>	Grassick, Richard	Amber Production Team	Amber Production Team	Harker, Emma	Amber Films	Drama	2005
<i>Shooting Shona</i>	Pastoll, Abner	Pastoll, Kamma	Pastoll, Abner	Burke, Sam	February Films	Thriller	2004
<i>Shootout</i>	Hapeshis, Michael	Bellinger, Justin	Hapeshis, Michael	Cooke, Caroline Burns	Artistry Media Limited	Comedy	2003
<i>Shopner Desh</i>	Sibley, Steve	Shah, Laion	Shah, Laion	Amin, Shah	Bangla Dreams	Crime	2006
<i>Showwheel</i>	Birkbeck, Ross	Schleifer, Shaheen	Shepherd, Andrew	Broke, Jonathan	Inbex Random	Comedy	2010
<i>Shrine, The</i>	Catterall, Duncan	Catterall, Duncan	Catterall, Duncan	Pizzey, Christopher	Duncan Catterall Productions	Drama	2007
<i>Shut Up and Shoot Me</i>	Agro, Steen	Sherwood, Paul	Agro, Steen	Roden, Karel	U.F.O. Pictures	Comedy	2005
<i>Shut Your Eyes</i>	Galen, Nikolai	Hobbs, Nick	Galen, Nikolai	Lewis, Sean	Voice of Shade	Drama	2009
<i>Sick House, The</i>	Radclyffe, Curtis	Morakhia, Shripal	Walker, Romla	Philips, Gina	Hopscotch Films	Horror	2006
<i>Silencer, The</i>	Wyndham, Simon	Wyndham Simon	Lawson, Steve	Salvage, Glenn	Phoenix-I Productions	Action	2005
<i>Silent Accomplice, The</i>	Knudsen, Erik	Knudsen, Janet	Knudsen, Erik	Choudhry, Naveed	One Day Films Ltd UK	Drama	2010
<i>Silent Cry</i>	Richards, Julian	La Terriere, Peter	Lubert, Simon	Woof, Emily	Little Wing Films	Thriller	2002
<i>Silent Knight</i>	Boyask, Ross	Foiadelli, Adrian	Boyask, Ross	Prior, Andy	Modern Life	Action	2005
<i>Silent Terror</i>	McDermott, Mark	Smith, Paul	McDermott, Mark	Curtis, Ruth	Impromptu Film Ltd UK	Thriller	2010
<i>Silver Goat, The</i>	Brookner, Aaron	Vaccaro, Paula Alvarez	Brookner, Aaron	McCorkindale, Don	Pinball London	Drama	2011
<i>Simon and Emily</i>	Isserow, Lee	Palsson, Kasja	Isserow, Lee	Kerkhoven, Ellis	Opiate of the People Films	Comedy	2008
<i>Siren</i>	Hull, Andrew	Dasmal, Amina	Hull, Andrew	Macken, Eoin	Alcove Entertainment	Horror	2010
<i>Sisterhood</i>	Wellings-Thomas, Richard	Corcoran, Emily	Corcoran, Emily	Default, Isabelle	Cork Films	Comedy	2008
<i>Sisters Grimm</i>	Moffat, Robbie	Moffat, Robbie	Moffat, Robbie	Kendall, Suzanne	Palm Tree Productions	Adventure	2009
<i>Sitting Ducks</i>	Fox, Gerald	Adam, Nick	Fox, Gerald	Mullion, Anabel	Synergy Films London Ltd	Comedy	2003
<i>Six Bend Trap (aka Thugs. Mugs and Dogs)</i>	McCarthy, Mike	Kann, D.W.	McCarthy, Mike	Courtney, Dave	Ironopolis Film Company	Comedy	2006
<i>Six Degrees (aka Graveyard Shift: A Zomedy of Terrors)</i>	Sen-Gupta, Sapphira	Sandsom, Dannielle	Hawkins, Jaq D	Collins, Louise	First Step Films	Horror	2009
<i>Skeletons</i>	Whitfield, Nick	Myres, Kate	Whitfield, Nick	Gaughan, Ed	Forward Films	Comedy	2010
<i>Sket</i>	Bhogal, Nirpal	Fischer, Patrick	Bhogal, Nirpal	Walters, Ashley	Revolver Entertainment	Crime	2011
<i>Skin</i>	Fabian, Anthony	Hofmeyr, Genevieve	Crawley, Helen	Okonedo, Sophie	Bard Entertainments	Drama	2008
<i>Slackistan</i>	Khan, Hammad	Khan, Shandana Ayub Hammad	Khan, Shandana Ayub Hammad	Akthar, Aisha Linnea	Big Upstairs Films Ltd UK	Drama	2010
<i>Sleeping with Fishes</i>	Gunn, Matthew J	Gunn, Matthew J	Gunn, Matthew J	Brooks, Lucy	Stray Monkey Productions	Crime	2006
<i>Slumber Party</i>	Marshall, Martin	Marshall, Martin	Marshall, Martin	Pritchard, Simon	NRG Films	Horror	2001
<i>Small Creatures (aka Nowhere Fast)</i>	Wallace, Martin	Wallace, Martin	Wallace, Martin	Coventry, Michael	Nova Inc. Film & TV Ltd.	Thriller	2010
<i>Small Town Folk</i>	Stanley-Ward, Peter	Stanley-Ward, Peter	Stanley-Ward, Peter	Wright, Chris R	Gumboot Pictures	Horror	2007
<i>Snake's Tail, A</i>	Daneshmand, Bijan	Daneshmand, Bijan	Daneshmand, Bijan	Marzban, Manou	The Film Exchange	Drama	2006
<i>SNUB</i>	Glendenning, Jonathan	Adams, John	Adams, John	Mavers, Gary	Angry Badger Pictures Ltd UK	Horror	2010
<i>Social Work</i>	Reynolds, Declan	Hipwell, Conor	Reynolds, Declan	Angelus, Daniel	Cartway Productions	Comedy	2007
<i>Soi Cowboy</i>	Clay, Thomas	Lang, Joseph	Clay, Thomas	Bro, Nicolas	Pull Back Camera Ltd.	Drama	2008
<i>Solid Air</i>	Thomas, May Miles	Thomas, Owen	Thomas, May Miles	Roeves, Maurice	Element Films	Thriller	2003
<i>Some Dogs Bite</i>	Munden, Marc	Feilden, Sara	Coghlan, Lin	Taylor, Aaron	Kindle Entertainment	Drama	2010

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<i>Some Voices</i>	Cellan-Jones, Simon	Broadbent, Graham	Penhall, Joe	Craig, Daniel	Dragon Pictures	Comedy	2000
<i>Someone Else</i>	Spector, Col	Chakraborty, Radha	Chakraborty, Radha	Mangan, Stephen	RSA Films	Comedy	2006
<i>Somers Town</i>	Meadows, Shane	Spurrier, Bamaby	Fraser, Paul	Jagiello, Piotr	Mother Vision	Comedy	2008
<i>Sommambulists, The</i>	Jobson, Richard	Adams, Richard	Jobson, Richard	O'Connell, Jack	No Bad Films	War	2012
<i>Son of Babylon</i>	Al-Daradji, Mohamed	Al-Daradji, Atea	Al-Daradji, Mohamed	Hussein, Shazada	Human Film	Drama	2009
<i>Son of Man</i>	Dornford-May, Mark	Dornford-May, Mark	Dornford-May, Mark	Kosi, Andile	Spier Films	Drama	2006
<i>Song of King Solomon</i>	Southouse, Stephen	Croot, Jason	Southouse, Stephen	Croot, Jason	Vermillion Films Ltd UK	Fantasy	2011
<i>Song of Songs</i>	Appignanesi, Josh	Griffiths, Gayle	Appignanesi, Josh	Press, Natalie	Wild Horses Films	Drama	2005
<i>Soul Searcher</i>	Oseman, Neil	Oseman, Neil	Clarke, James	Brake, Richard	Jigawatt Pictures	Thriller	2005
<i>SoulBoy (aka Souled Out)</i>	Marcus, Shimmy	Alderson, Christine	Williams, Jeff	Compston, Marton	Ipsos Facto Films	Comedy	2010
<i>South West Nine</i>	Parry, Richard	Niblo, Allan	Parry, Richard	Stapleton, Nicola	Vertigo Films	Comedy	2000
<i>Space Between, The</i>	Barrow, Tim	Barrow, Tim	Barrow, Tim	Reid, Vivien	Lyre Productions	Romance	2010
<i>Space Invader</i>	Strauss, Tatiana	Strauss, Tatiana	Strauss, Tatiana	Gregory, Brendan	Invasion Films	Drama	2002
<i>Sparkle</i>	Hunter, Neil	Pope, Martin	Hunter, Neil	Channing, Stockard	Martin Pope Productions	Comedy	2007
<i>Sparrow</i>	Troke, Shaun	Stuchlik, Wojciech	Di Febo, Justin	Sewell, Faye	East Pictures	Horror	2010
<i>Special People</i>	Edgar, Justin	Usborne, Alex	Edgar, Justin	Coleman, Dominic	104 Films	Drama	2007
<i>Speed of Light</i>	Peterson, Nick	Norwood, Tom	Gaud, Nicolas	Hall, Alex	EdgeImageBank	Drama	2005
<i>Spell, The</i>	Carey-Jones, Owen	Jones, Owen Carey	Carey-Jones, Owen	Pitkin, Rebecca	Carey Films Limited	Drama	2009
<i>Spiderhole</i>	Simpson, Daniel	O'Neill, Patrick	Simpson, Daniel	Malin, Emma	Spiderhole Productions Ltd Ireland	Horror	2010
<i>Spin</i>	Shonaiya, Ayo	Shonaiya, Ayo	Shonaiya, Ayo	Griffiths, Caroline	Rainmaker 70 Filmworks	Drama	2000
<i>Spinning Candyfloss</i>	Pernicci, Anna	Bloom, Nicholas	Pernicci, Anna	Crawford, Daz	Tortoise Rock Films	Crime	2000
<i>Spivs</i>	Teague, Colin	Skeggs, Hamish	Teague, Colin	Dee, Jack	Carnaby International	Comedy	2004
<i>Splinter</i>	Maurer, Kai	Maurer, Kai	Marquand, James	Barber, Paul	Surface Films	Comedy	2006
<i>Splintered</i>	Halligan, Simeon	Richardson-Jones, Rachel	Halligan, Simeon	Walters, Stephen	Not a Number	Horror	2010
<i>Spoken by Crowds</i>	Zaffino, Marco	Taylor, Nik	Zaffino, Marco	Vann, Lindsay	Minstrel Walleye	Drama	2005
<i>SSDD: Same Sh*t Different Day</i>	Hall, Greg	Finlay-Hall, Rebecca	Hall, Greg	Anoyke, Samuel	Broke But Making Films	Drama	2010
<i>St Ann's Demons</i>	Gerry, Brett	Gerry, Brett	Gerry, Brett	Burrows, Rob	Brett Gerry Films Ltd UK	Mystery	2012
<i>Stag Night of the Dead</i>	Jones, Neil	Jones, Neil	Jones, Neil	Street, Sebastian	Zomball Films Ltd.	Comedy	2009
<i>Stagknight</i>	Cathcart, Simon	Mercer, Rob	Cathcart, Simon	Osorio, Jocelyn	Stagknight Ltd	Comedy	2007
<i>Stalker (aka Expose)</i>	Kemp, Martin	Sothcott, Jonathan	Kemp, Martin	Murray, Billy	Black and Blue Films Limited	Horror	2010
<i>STARTled</i>	Marshall, Maria	Broadfoot, Francesca	Marshall, Maria	Naef, Jacob	Eighty Eighty Ten Productions Ltd UK	Horror	2010
<i>STDevs, The</i>	Sunderland, Matthew	King, Simon	King, Simon	Gilroy, Gerard	Yokon Films	Comedy	2006
<i>Stealing Elvis</i>	Edwards, Ed	Edwards, Sam	Edwards, Sam	Baxter, Naomi	Ragged Crow	Crime	2010
<i>Stella Street</i>	Richardson, Peter	Swaffer, Ben	Cornwall, Phil	Sessions, John	Stella Street Productions	Comedy	2004
<i>Stone Seeker</i>	Damaam, Neil	Moffat, Robbie	Damaam, Neil	Gates, Jon Paul	Laird Ltd.	Action	2011
<i>Stone: No Soul Unturned, The</i>	Gardiner, Philip	Spencer, Nik	Gardiner, Philip	Andrews, Ade	Chalk Productions	Horror	2010
<i>Stormhouse</i>	Turner, Dan	Fisher, Dean	Turner, Dan	Flynn, Katherine	Scanner-Rhodes Productions	Horror	2011
<i>Strange Factories</i>	Harrigan, John	Harrigan, Lucy	Harrigan, John	Astarita, Annalisa	Foolish People Ltd UK	Horror	2012
<i>Stranger Than Kindness</i>	Cottage, Ian	Cottage, Ian	Cottage, Ian	Rutter, Simon	Airship Films Ltd.	Drama	2006
<i>Stranger Things</i>	Burke, Eleanor	Burke, Eleanor	Burke, Eleanor	Collins, Bridget	Faces Films	Drama	2010
<i>Strawberry Fields</i>	Lea, Frances	Beatty, Liam	Lea, Frances	Elliott, Emun	Mosaic Films	Drama	2011
<i>Strictly Sinatra</i>	Capaldi, Peter	Kenley-Letts, Ruth	Capaldi, Peter	Hart, Ian	DNA Films	Drama	2001
<i>Stud Life</i>	Campbell X	Nwimo, Stella	Campbell X	Miller, T'Nia	New Lime Republic Ltd.	Drama	2012
<i>Sub Zero</i>	Dowson, Ian	Taylor, Chris J	Dowson, Ian	Fellows, Bill	Superkrush Films	Drama	2006
<i>Submarine</i>	Ayoade, Richard	Burke, Mary	Ayoade, Richard	Taylor, Noah	Warp Films	Comedy	2010
<i>Subterranean Blue</i>	Richards, Glenn-Emlyn	Richards, Glenn-Emlyn	Richards, Glenn-Emlyn	Atkins, Tyrone	Wodum	Drama	2001
<i>Sugarhouse (aka Collision)</i>	Love, Gary	David, Arvind Ethan	Leyton, Dominic	Serkis, Andy	Slingshot Studios	Crime	2007
<i>Summer</i>	Gleenaan, Kenny	Bray, Camilla	Ellis, Hugh	Carlyle, Robert	Sixteen Films	Drama	2008
<i>Summer Rain</i>	Glendening, Jonathan	Glendening, Jonathan	Glendening, Jonathan	Allen, Charlie	Great British Films	Drama	2001
<i>Summer Scars</i>	Richards, Julian	Richards, Julian	Wilson, Al	Howarth, Kevin	Prolific Films	Horror	2007

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<i>Summertime</i>	Evans, Maxine	Smith, Antony	Docking, Neil	Raymond, Matthew	Tornado Independent Films Ltd.	Musical	2011
<i>Sunstroke</i>	Coburn, Lesley	Reid, Kenny	Coburn, Lesley	Lamacraft, Jane	14-26 Films	Thriller	2007
<i>Superhero, The</i>	Simcox, Adam	Greenberg, Olivia	Simcox, Adam	Hannaway, Damien	Freestyle Films	Action	2006
<i>Superman: Requiem</i>	Fallaize, Gene	Cook, Tony	Fallaize, Gene	Richardson, Martin	Eagle House Pictures Ltd UK	Action	2011
<i>Superstition</i>	Hope, Kenneth	Glinwood, Terry	Hoffman, Paul	Strong, Mark	Delux Productions	Drama	2001
<i>Surveillance</i>	Oremland, Paul	Gardiner, Tracey	Sampson, Kevin	Callow, Simon	Blue Blood Films	Thriller	2007
<i>Surviving Evil</i>	Daw, Terence	Ernst, Anton	Daw, Terence	Torre, Joel	Focus Films Limited	Action	2009
<i>SUS</i>	Heath, Robert	Dyer, Clint	Keefe, Barrie	Brown, Ralph	Thin Film Productions	Drama	2010
<i>Suzie Gold</i>	Cantor, Ric	Green, Rebecca	Cantor, Ric	Fraval, Ariana	Green Wolf Films	Comedy	2004
<i>Sweet Sixteen</i>	Loach, Ken	O'Brien, Rebecca	Laverty, Paul	Compston, Martin	Sixteen Films	Drama	2002
<i>Swimmer, The</i>	Mahmood, Ash	Mahmood, Naeem	Mahmood, Ash	Summernote, Kyle	Transient Film Exchange	Drama	2005
<i>Tacho</i>	Landa, Mirjam	Wild, Steffen	Danda, Daniel	Landa, Daniel	Fourth Culture Films	Action	2010
<i>Take Me to Your Leader</i>	Wright, Keith	Wright, Keith	Wright, Keith	Bingham, Roger	FrissonFilm Ltd	Comedy	2008
<i>Tale of Our Little Deaths, The (aka L'Histoire de nos petites morts)</i>	Chidlow, David	Chidlow, David	Chidlow, David	Lanza, Delphine	Campfire Stories Ltd UK	Drama	2012
<i>Tales of the Fourth Dimension</i>	Hussein, Arif	Fletcher, Nik	Hussein, Arif	O'Brien, Richard	The Ghost Film Company	Sci-Fi	2008
<i>Tan Lines</i>	Williams, Johnny	Williams, Johnny	Williams, Johnny	Southern, Andrew	Vanguard Cinema	Drama	2005
<i>Tangled up in Blue</i>	Rashid, Haider	Carvelli, Francesco	Boesen, Brad	Attfield, Ian	Bluesun Films	Drama	2009
<i>Tash Force</i>	Booth, Michael	Rigg, Stephen	Booth, Michael	Woodward, Mark	Blackdog Productions Ltd UK	Comedy	2012
<i>Telephone Detectives</i>	Reynaud, Mark	Mariani, William	Walsh, Andrew	Hill, Daniel	Mediabus Industries Ltd.	Horror	2000
<i>Telstar: The Joe Meek Story</i>	Moran, Nick	Jordan, Simon	Hicks, James	Spacey, Kevin	Aspiration Films	Drama	2007
<i>Temp, The</i>	Byrne, Douglas	Byrne, Karen	Byrne, Douglas	Dec, Matt	TV Plus Films Ltd UK	Comedy	2010
<i>Temptation (aka Black Tower: Temptation)</i>	Taylor, Catherine	Hicks, Lionel	White, Julianne	Haines, Caroline	Hicks / Jaggi Limited	Fantasy	2009
<i>Ten Dead Men (aka 10 Dead Men and originally FXers)</i>	Boyask, Ross	Hobden, Phil	Boyask, Ross	Carr, Brendan	Modern Life	Action	2006
<i>Territory</i>	Johnson, Reuben	Brittain, Victoria	Johnson, Reuben	Johnson, Reuben	Fiddy West Productions Ltd UK	Comedy	2012
<i>Terry</i>	Nevern, Nick	Maza, Jason	Nevern, Nick	Nevern, Nick	Terry the Movie Ltd UK	Crime	2011
<i>That Deadwood Feeling (aka Deadwood or Three Men in a Restaurant)</i>	Ubsdell, Simon	McCusker, Donall	Ubsdell, Simon	Bonamy, Max	The Electric Theatre Company	Comedy	2002
<i>That Difficult Second Album</i>	Simcox, Adam	Skinner, Andrew	Simcox, Adam	Levi, Joe	Freestyle Films	Comedy	2008
<i>That Samba Thing</i>	Hayes, Teddy	Rosenthal, Jenny	Hayes, Teddy	da Vila, Martinho	SKD Productions	Drama	2008
<i>That's For Me!</i>	Solti, Claudia	Solti, Claudia	Solti, Claudia	Tammer, Debra	H2O Motion Pictures	Comedy	2009
<i>The Disappearance of Alice Creed</i>	Blakeson, J	Sturges, Adrian	Blakeson, J	Arterton, Gemma	CinemaNX	Horror	2009
<i>There's only one Jimmy Grimble</i>	Hay, John	Bolt, Jeremy	Carmichael, Rik	McKenzie, Lewis	CanalPlus	Comedy	2000
<i>These Are Your Creams</i>	Morgan, Robin	Aldous, Simon	Aldous, Simon	Bateson, Katherine	Boogle Eyes	Comedy	2003
<i>Third Star (aka Barafundle Bay)</i>	Dalton, Hattie	Broad, Kelly	Sivell, Vaughan	Cumberbatch, Benedict	Western Edge Pictures	Comedy	2010
<i>This Filthy Earth</i>	Kotting, Andrew	Woolford, Ben	Kotting, Andrew	Palmer, Rebecca	Tall Stories	Drama	2001
<i>This is England</i>	Meadows, Shane	Herbert, Mark	Meadows, Shane	Turgoose, Thomas	Warp Films	Drama	2006
<i>This is Not a Love Song</i>	Eltringham, Bille	Blaney, Mark	Beaufoy, Simon	Colgan, Michael	Footprint Films Limited	Thriller	2002
<i>This Little Life</i>	Gavron, Sarah	MacKinnon, Stewart	Kay, Rosemary	Mullan, Peter	Common Features	Drama	2003
<i>Those Without Shadows</i>	Sweeney, John	Myin, Nila Maria	Sweeney, John	Barat, Elisabeth	Beyond the Line	Drama	2004
<i>Three Blind Mice</i>	Ledoux, Mathias	Caldera, Carolyn	Olivier, Mikael	Furlong, Edward	Kcraft and Co	Crime	2003
<i>Three Kings</i>	Mosley, Shaun	Turner, Rod	Mosley, Shaun	Freeman, Paul	Indio Pictures	Drama	2000
<i>Three Minute Moments</i>	Allen, Don	Allen, Don	Patience, Hari	Amies, Gabrielle	All Enquiries Productions	Comedy	2007
<i>Three Stags</i>	Locke, Mark	Locke, Mark	Locke, Mark	Brakewell, Richard	Fort Mark Films Ltd UK	Comedy	2010
<i>Three's a Shroud</i>	Brownlie, Dan	Brownlie, Dan	Brownlie, Dan	Booth, Emily	Dead Food Films Ltd UK	Horror	2012
<i>Through the Looking Glass</i>	Griffith, Craig	Craig Griffiths	Griffiths, Craig	McCarthy, Paul	The Workshop	Horror	2006
<i>Throw of a Dice</i>	Chazzel, Chaand	Chazzel, Chaand	Chazzel, Chaand	Sahota, Ruby	CVS Films	Drama	2011
<i>Thugs, Mugs and Violence</i>	Chen, Djonny	Knight, Paul	Knight, Paul	O'Keefe, Jamie	New Breed Productions	Action	2009
<i>Tick Tock Lullaby</i>	Gornick, Lisa	Gornick, Lisa	Gornick, Lisa	Bending, Joanna	Valiant Doll	Drama	2005
<i>Ticking Man, The</i>	Simpson, Steven Lewis	Simpson, Steven Lewis	Simpson, Steven Lewis	McCafferty, Alan	Roaring Fire Film Production	Thriller	2003
<i>Tied in Blood</i>	Lawrence, Matthew	Baumont, David	Ross, David	McEwan, Paul	Rotunda Films	Horror	2010

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<i>Till Sunset</i>	Woods, David	Woods, David	Woods, David	Sweeney, Shane	Filthy Lucre Productions	Horror	2010
<i>Time of Her Life</i>	Smith, Steven M.	Smith, Steven M.	Smith, Steven M.	Penneycard, Laura	Greenway Entertainment	Drama	2005
<i>Tiny Town</i>	Alagan, Mathi	Alagan, Mathi	Alagan, Mathi	Munro, Annabelle	Aruna Films Ltd.	Drama	2008
<i>Tomorrow</i>	Clayton, Alastair	Laws, Stuart	Laws, Stuart	Sansum, Ben	WindowSlaws Productions	Action	2004
<i>Tomorrow La Scala!</i>	Joseph, Francesca	Caleb, Ruth	Joseph, Francesca	Johnson, Karl	BBC Films	Drama	2002
<i>Tonight You're Mine (aka You Instead)</i>	Mackenzie, David	Berrie, Gillian	Leveritt, Thomas	Treadaway, Luke	Sigma Films	Comedy	2011
<i>Tony</i>	Johnson, Gerard	McCulloch, Dan	Johnson, Gerard	Maskell, Neil	Tightrope Pictures	Drama	2009
<i>Too Much Too Young</i>	Smith, Trevor Steven	Fenegang, Stuart	Smith, Trevor Steven	Shepherd, Steve John	Pensmith Pictures	Comedy	2007
<i>Tooting Broadway: It's not where you live but how</i>	Shanmugam, Dev	Clement, Joshua	Hulugalle, Tikiri	Sidhu, Nav Neville	Tooting Broadway Films Ltd UK	Crime	2012
<i>Torment, The (aka The Possession of David O'Reilly, Inside)</i>	Cull, Andrew	Isles, Steve	Cull, Andrew	Alderson, Giles	Authentic Films Ltd UK	Horror	2010
<i>Tormented</i>	Wright, Jon	Brimm, Tracy	Prentice, Stephen	Pettyfer, Alex	Forward Films, Slingshot	Comedy	2009
<i>Tortoise in Love</i>	Browning, Guy	Aquarone, Steffan	Browning, Guy	Mitchelson, Tom	Immense Productions	Comedy	2010
<i>Touching the Void</i>	Macdonald, Kevin	Smithson, John	Simpson, Joe	Mackey, Brendan	Darlow Smithson Production	Drama	2003
<i>Toybox, The</i>	Sedazzari, Paolo	Mason, Simon	Sedazzari, Paolo	Jordan, Elliott	Brandnew Films	Horror	2005
<i>Trace</i>	Gayle, Rita	Gayle, Rita	Gayle, Rita	Barrow, Anthony Mark	Kuruji Films	Drama	2007
<i>Trailer, The</i>	Emm, Nick	Emm, Nick	Emm, Nick	Emerson, Richard	Jobbernowl Films Ltd UK	Comedy	2010
<i>Trapped</i>	Cantwell, Graham	Clarke, Patrick	Fox, Anthony	McSorley, Gerard	Fox Glove Films	Action	2008
<i>TrashHouse</i>	Higgins, Pat	Higgins, Pat	Higgins, Pat	Moelter, Amber	Jinx Media	Comedy	2005
<i>Travellers</i>	McManus, Kris	Richards, Ben	McManus, Kris	Sweeney, Shane	Animus Pictures	Thriller	2011
<i>Travellers and Magicians</i>	Norbo, Khyentse	Steiner, Raymond	Norbo, Khyentse	Dendup, Tschewang	Prauer Flag Pictures	Drama	2003
<i>Treacle Jr</i>	Thraves, Jamie	Small, Rob	Traves, Jamie	Gillen, Aidan	Golden Rule Films	Drama	2010
<i>Triads, Yardies & Onion Bhajees</i>	Bains, Sarjit	Patel, Manish	Patel, Manish	Bassi, Jass	Ghetto Vision	Action	2003
<i>Trinity</i>	Boulton-Brown, Gary	Haight, Adam	Bolton-Brown, Gary	McCamus, Tom	Worldmark Films Ltd.	Sci-fi	2001
<i>Trouble Sleeping</i>	Rae, Robert	Dick, Eddie	Rae, Robert	Naama, Hassan	Theatre Workshop	Drama	2008
<i>Trouble with Men and Women, The</i>	Fisher, Tony	Simon, Christopher	Fisher, Tony	McFadden, Joseph	S Films	Drama	2003
<i>Truth Game, The</i>	Rumley, Simon	Jackson, Piers	Rumley, Simon	Blackthorne, Paul	Screen Production Associates	Drama	2001
<i>Truth or Dare</i>	Heath, Robert	Jermyn, Rupert	McGuchan, Matthew	Oakes, David	Corona Pictures Ltd UK	Horror	2011
<i>Truth, The</i>	Milton, George	Edwards, Julie-Anne	Milton, George	Beck, William	2 Many Executives The UK Film & Television Production Company	Comedy	2006
<i>Tsotsi</i>	Hood, Gavin	Fudakowski, Peter	Hood, Gavin	Chwenyagae, Presley		Crime	2005
<i>TuEsday</i>	Bennett, Sacha	Parsons, Jonathan	Bennett, Sacha	Simm, John	Hangman Films	Action	2008
<i>Tuck Bushman and the Legend of Piddledown Dale</i>	Lumb, Chris	Lumb, Chris	Lumb, Chris	Lumb, Chris	Lumbfilm Ltd UK	Comedy	2009
<i>Turbulence</i>	Baig-Clifford, Michael	Carlsh, Natasha	Pamballis, Stavros	Banks, Adrian	Vicarious Dreams Ltd UK	Comedy	2011
<i>Turn in your Grave</i>	Ager, Robert	Ager, Robert	Ager, Robert	Bolton, Marc	Ager Media Liverpool Ltd UK	Horror	2010
<i>Turning, The</i>	Impey, Jason	Yildirim, Kemal	Impey, Jason	Burniston, Cheryl	Knight Productions 2000 Ltd UK	Horror	2011
<i>Turnout</i>	Sales, Lee	Barratt, Nick	Sales, Lee	Drew, Ben	Fulwell 73 Ltd UK	Drama	2011
<i>Twelfth Night</i>	Richardson, Ed	Winter-Willoughby, Anna	Shakespeare, William	Bullock, Miles	Outlook Productions	Drama	2005
<i>Twisted</i>	Ralph, Nicholas	O'Keefe, Felix	Lucey, Matthew	Berk, Sarah	No Logo Films	Comedy	2003
<i>Twisted Sisters</i>	Buld, Wolfgang	Coe, Nick	Buld, Wolfgang	Horsey, Fiona	Dark Black Films	Thriller	2006
<i>Two Donuts</i>	Finnigan, Duncan	Finnigan, Duncan	Finnigan, Duncan	Callaghan, James	FIN Scotland Productions	Drama	2002
<i>Tyrannosaur</i>	Considine, Paddy	Scrimshaw, Diarmid	Considine, Paddy	Mullan, Peter	Warp X	Drama	2011
<i>Ultimate Truth, The</i>	Clark, Nick	Swanston, Tom	Clark, Nick	Howeld, Keir	Wysiwyg Films	Comedy	2004
<i>Ulysses Road</i>	Gathe, Lars Harald	Kolber, Anna	Chianta, Paolo	Wolff, Phillip	Fenris Films	Comedy	2008
<i>Umbrage: The First Vampire (aka Umbrage)</i>	Cullingham, Drew	Cullingham, Drew	Cullingham, Drew	Bradley, Doug	Motion Picture House Stone City Films Ltd UK	Horror	2009
<i>Unconditional</i>	Higgins, Bryn	Higgins, Bryn	Fisher, Joe	Cooke, Christian		Thriller	2012
<i>Under the Bombs</i>	Aractingi, Philippe	Aractingi, Philippe	Aractingi, Philippe	Atallah, Bshara	Starfield Productions	Drama	2007
<i>Under the Mud</i>	Papadopoulos, Solon	Boulter, Roy	Barlow, Sophia	Schofield, Andrew	Hurricane Films	Comedy	2006
<i>Underground</i>	Cheung, Chee Keong	Cheung, Chee Keong	Cheung, Chee Keong	Strange, Mark	Intense Productions	Action	2008
<i>Unhappy Birthday</i>	Harriott, Mark	Matthews, Mike	Matthews, Mike	Paisley, David	Unhappy Birthday Productions Ltd.	Drama	2010
<i>United</i>	Strong, James	Stannard, Julia	Chibnall, Chris	Andrews, Dean	World Productions	Drama	2011

Title:	Director:	Producer:	Screenwriter:	Cast (Top Billed):	Production Company:	IMDb Genre:	Year Finished
<i>Unrelated</i>	Hogg, Joanna	Stone, Barbara	Hogg, Joanna	Worth, Kathryn Bannatyne, Neamh	Raw Siena Ltd	Drama	2007
<i>Untitled Composition #1</i>	Bannatyne, Neamh	Bannatyne, Neamh	Bannatyne, Neamh	Bannatyne, Neamh	Testify Pictures	Drama	2005
<i>Up There</i>	Salim, Zam	Davis, Annalise	Salim, Zam	Gorman, Burn	Wilder Films	Comedy	2011
<i>Upstaged</i>	Walkington, Andrew	Walkington, Andrew	Healey, Andrew	Cool, Phil	Cheshire Youth Film Project	Comedy	2005
<i>Urban Breakdown</i>	Crosbie, Jim	Crosbie, Jim	Crosbie, Jim	Bach, Katrine	Mardi Gras Motion Pictures	Drama	2003
<i>Urge, The</i>	Andrews, Chris	Kingston, Nina	Andrews, Chris	Bracken, Simon	Solstice Films Ltd.	Drama	2011
<i>Vacation Hunter</i>	Spencer, Daz	Barnett, Blair	Spencer, Daz	Ryan, Frank	Sabrewing Films Ltd UK	Drama	2010
<i>Vampire Diary</i>	James, Mark	Riley, Michael	O'Shea, Phil	Walton, Anna	Bard Entertainments	Horror	2007
<i>Vampires of Bloody Island, The</i>	Kempthorne, Allin	Kempthorne, Pamela	Kempthorne, Allin	Kempthorne, Pamela	Wibbell Productions Ltd	Comedy	2007
<i>Vanguard, The</i>	Hope, Matthew	Hope, Matthew	Hope, Matthew	Bullock, Ray	Propaganda Pictures	Sci-fi	2007
<i>Veil, The</i>	Chance, Richard	Chance, Richard	Chance, Richard	Allen, Russell	Chance Encounters	Action	2005
<i>Veiled Existence</i>	King, David	Ahmed, Munir	King, David	Jogi, Kiren	Birmingham Media	Drama	2007
<i>Vendetta, The</i>	Zaffino, Marco	Allen, Robert	Zaffino, Marco	Manni, Laura	Minstrel Wall Eye Productions	Drama	2003
<i>Venus Drowning</i>	Parkinson, Andrew	Parkinson, Andrew	Parkinson, Andrew	Jameson, Jody	Long Pig	Horror	2006
<i>Venus in Eros</i>	Imai, Takako	Imai, Takako	Imai, Takako	Hara, Saori	RM Europe Ltd UK	Fantasy	2012
<i>Veranda, The</i>	Zaffino, Marco	Zaffino, Marco	Zaffino, Marco	Pirie, Zoe	Minstrel Wall Eye Productions	Drama	2001
<i>Verity's Summer</i>	Crowe, Ben	Hartland, Christine	Crowe, Ben	Barbe-Willson, Indea	Multistory Films	Drama	2012
<i>Veteran, The</i>	Hope, Matthew	Leggatt, Kim	Hope, Matthew	Kebbell, Toby Madedkwe, Ashley	Veteran Pictures Ltd.	Action	2011
<i>Victim</i>	Pillai, Alex	Adams, John	Chin, Ashley	Chin, Ashley	Pure Film Productions	Action	2011
<i>Victims</i>	Bryant, David	Bryant, David	Bryant, David	Bocelli, John	Menan Films	Thriller	2011
<i>Vinyl</i>	Sugarman, Sara	Reed, Clay	Sugarman, Sara	Allen, Keith	H2O Motion Pictures	Comedy	2012
<i>Virgin of Liverpool, The</i>	Donaldson, Lee	Vadim, Jean	Brailey, Gil	Vegas, Johnny	The Mob Film Company	Adventure	2003
<i>Vivid</i>	Cottrell-Boyce, Joe	Cottrell-Boyce, Joe	Cottrell-Boyce, Joe	Cottrell-Boyce, Joe	Ghetosaints	Horror	2006
<i>Waiting at the Gate</i>	Palladino, Rocky	Arguedas, Priscilla	Palladino, Rocky	Eustace, Joshua Duff, Anne-Marie	Fade In Productions	Drama	2007
<i>Waiting Room, The</i>	Goldby, Roger	Sulick, Sarah	Goldby, Roger	Goldby, Roger	Bright Pictures	Romance	2007
<i>Wake Wood</i>	Keating, David	McCarthy, Brendan	Keating, David	Gillen, Aidan	Hammer Film Productions	Horror	2011
<i>Wake, The</i>	Williams, Paul	Terry, Paul Maclean-Clark, Alister	Williams, Paul	Carter-Hope, Daniel	Evil Hypnotist Productions	Comedy	2006
<i>War Bride, The</i>	Chubbock, Lyndon	Workman, Angela	Workman, Angela	Friel, Anna Bickersteth, James	Random Harvest Pictures	Drama	2001
<i>War Crimes</i>	Thomas, Michael G.	Thomas, Nick S.	Thomas, Michael G.	Thomas, Michael G.	Spearhead Films	Thriller	2005
<i>Ward 3</i>	Choi, April	Bentley, Simon	Donoghue, Fred	Barrio, Marta	Met Film Productions Ltd UK	Horror	2012
<i>Warehouse, The</i>	Taylor, Matt	Lucas, Abbie	Taylor, Matt	Lee, Julian Campbell, Cheryl	FBH Films Limited	Drama	2011
<i>Warning: Monday 10am, The</i>	Hamilton, Mark	Hamilton, Mark	Birks, Daniel	Birks, Daniel	Fat Herdsman Films	Thriller	2002
<i>Warrior, The</i>	Kapadia, Asif	Faivre, Bertrand	Kapadia, Asif	Khan, Irfan	The Bureau	Adventure	2001
<i>Wasted</i>	Paterson, Caroline	Griffin, Wendy	Paterson, Caroline	Leiper, Neil	Wasted Productions Limited	Drama	2009
<i>Wasted Youth</i>	Naughton, Bruce	Naughton, Bruce	Naughton, Bruce	Usher, Colin	Running Dog Films	Comedy	2001
<i>Wasters</i>	Rufo, Luke	McDonagh, Kevin	Rufo, Luke	Breeze, Mark Murdock, Johanne	Rotunda Films	Drama	2009
<i>Watching and Waiting</i>	Fair, James	Hector, Gary	Fair, James	Fair, James	Hello Camera	Drama	2008
<i>Way of Life, A</i>	Asante, Amma	Edwards, Peter	Asante, Amma	James, Stephanie Longworth, Miles	AWOL Films	Drama	2004
<i>We Love You, John Salt</i>	Bell, Adam	Bell, Adam	Vinson, Claire	Vinson, Claire	Ten Storey Films	Comedy	2000
<i>We Need to Talk about Kieron (aka Education of Kieran)</i>	Murphy, Steve	Dalivalle, Kal	Pirkis, Tory Lyne	Wilby, James	Big Dream Productions UK	Romance	2011
<i>We've got the Toaster</i>	Laloe, Mike	Moffatt, Janey	Laloe, Mike	Mander, Jamie	Toaster Productions	Comedy	2006
<i>Weak at Denise</i>	Nott, Julian	Nott, Julian	Nott, Julian	Thomas, Bill	Peninsula Films	Comedy	2001
<i>Web of Deceit</i>	Franco, Nick Layton, James D.	Franco, Nick Layton, Ibraheem James	Craig, Ian Layton, James	Howe, Michael Layton, Ibraheem James, Eleanor	24 Carrot Films Oh Gosh! Productions Ltd UK	Action	2005
<i>WebKam</i>	Franco, Nick Layton, James D.	Franco, Nick Layton, Ibraheem James	Craig, Ian Layton, James	Howe, Michael Layton, Ibraheem James, Eleanor	24 Carrot Films Oh Gosh! Productions Ltd UK	Horror	2010
<i>Wedding Most Strange, A</i>	Garlick, Trevor	Garlick, Trevor	Garlick, Trevor	Andrew, Clive	Trinity X Productions	Comedy	2011
<i>Wedding Tackle, The</i>	Dvir, Rami	Horne, Nigel	Horne, Nigel	Dunbar, Adrian	Viking Films	Comedy	2000
<i>Weekend</i>	Haigh, Andrew	Dargavel, Rachel	Haigh, Andrew	Cullen, Tom	Bureau	Romance	2011
<i>Weekend Retreat</i>	Harvey, Brett	Harvey, Simon	Harvey, Brett	Sutton, Dudley	o-region	Comedy	2011
<i>Weekender</i>	Golden, Karl	Brady, Ian	Coghill, Chris	Ashton, Zawe	Benchmark Films	Musical	2011
<i>Weekender (aka Weekend)</i>	Haigh, Andrew	Goligher, Tristan	Haigh, Andrew	New, Chris	Glendale Picture Company Ltd UK	Drama	2011

Title:	Director:	Producer:	Screenwriter:	Cast (Top Billed):	Production Company:	IMDb Genre:	Year Finished
<i>Welcome to the Majority</i>	Owen, Russell	Owen, Russell	Owen, Russell	Hurd-Wood, Philip	Castle Valley Films Ltd UK	Thriller	2012
<i>West End Story, The</i>	Sampaio, Gerard	Sampaio, Gerard	Sampaio, Gerard	Cooper, Lisa May	Simpatico Productions	Drama	2005
<i>West is West</i>	de Emmony, Andy	Udwin, Leslee	Khan-Din, Ayub	Khan, Aqib	Assassin Films	Comedy	2010
<i>West Wittering Affair, The</i>	Scheinmann, David	Timlett, Ben	Scheinmann, Danny	Scheinmann, Danny	Bill and Ben Productions	Comedy	2005
<i>Weyback</i>	Coote, Jonathan	Jones, Martin	Town, Willard	Coote, Jonathan	Little Apple Productions	Drama	2001
<i>What You See Is What You Get</i>	Carretta, Al	Carretta, Al	Carretta, Al	Carretta, Al	Nightpiece Media Ltd UK	Crime	2010
<i>Whatever Happened to Pete Blaggit</i>	Jeavons, Mark	Jeavons, Mark	Jeavons, Mark	Leetham, Rob	Sepia Films	Comedy	2012
<i>When Brendan Met Trudy</i>	Walsh, Kieron J	Myles, Lynda	Doyle, Roddy	McDonald, Peter	Deadly Films	Comedy	2000
<i>When I was Twelve</i>	Savage, Dominic	Caleb, Ruth	Savage, Dominic	Bell, Neil	BBC	Drama	2001
<i>When in London</i>	Carbone, Nina	Whitworth, Hugh	Carbone, Nina	Smith, James Innes	Madhatter Productions	Drama	2001
<i>Where Eskimos Live</i>	Wisniewski, Tomasz	Brurda, Chris	Brutter, Robert	Hoskins, Bob	Akson Studios	Drama	2002
<i>Where have all the Cowboys gone?</i>	Farrell, Hugh	Farrell, Hugh	Farrell, Hugh	Beard, Jeremy	Pilton Pictures	Drama	2001
<i>Whispers</i>	Sutton, Tammi	Rees, Craig	Sutton, Tammi	Hazell, Keeley	Tower Bridge Productions Ltd UK	Mystery	2012
<i>White Lightnin'</i>	Murphy, Dominic	Downey, Mike	Smith, Shane	Hogg, Ed	Film & Music Entertainment	Drama	2009
<i>White Out</i>	Brewster, Lawrie	Brewster, Lawrie	Daly, Sarah	Finnegan, John	Icy Pictures Ltd UK	Drama	2011
<i>White Van Man</i>	Heron, Thomas	Ferguson, Christine	Heron, Thomas	Dore-Boize, Dutch	Muckle Films	Action	2008
<i>Who Can I Turn To?</i>	Isaac, Andy	Issac, Andy	Issac, Andy	Easter, David	The Film Exchange	Drama	2001
<i>Wicked (aka Nefarious)</i>	Knighton, Michael	Tivers, Paul	Knighton, Michael	Bodnia, Kim	Wicked Film Productions	Drama	2008
<i>Wickham Road</i>	Nash, Oliver	Dench, Kristian	Nash, Oliver	Elvin, Elizabeth	Northiam Films	Drama	2005
<i>Wide Open Spaces</i>	Hall, Tom	Donovan, Paul	Mathews, Arthur	O'Hanlon, Ardal	MeadKerr Limited	Comedy	2009
<i>Wilbur (Wants to Kill Himself)</i>	Scherfig, Lone	Olsen, Sisse Graum	Scherfig, Lone	Sives, Jamie	Zentropa Productions	Comedy	2002
<i>Wilby Park</i>	Fielding, Ian	Fielding, Ian	Fielding, Ian	Conroy, Claire	Luxurious Dread	Action	2010
<i>Wild About Harry</i>	Lowney, Declan	Cooper, Robert	Bateman, Colin	Gleeson, Brendan	Scala Productions	Romance	2000
<i>Wild Bill</i>	Fletcher, Dexter	Chapman, Andrew	Fletcher, Dexter - King, Danny	Creed-Miles, Charlie	20ten Media	Drama	2011
<i>Wild Country</i>	Strachan, Craig	Borland, Ros	Strachan, Craig	Shields, Samantha	Gabriel Films	Horror	2005
<i>Wild Side</i>	Lifshitz, Sebastien	Sandoz, Gilles	Bouquet, Stephane	Micheline, Stephanie	Maia Films	Drama	2004
<i>Winter of Love (aka A Quiet Desperation, also The Line?)</i>	Maan, Shakila Taranum	Maan, Shakila Taranum	Bassi, Shekhar	Bassi, Shekhar	Falcon Films	Drama	2001
<i>Winter Sun is a Lie, The</i>	Abassi, Nassim	Abassi, Nassim	Abassi, Nassim	Bovolenta, Sara	Moondund Productions	Drama	2005
<i>Winter Warrior, The (aka The Bone Hunter)</i>	Moffat, Robbie	Sutherland, Mairi	Moffat, Robbie	Watson, James	Palm Tree UK	Adventure	2003
<i>Wishbaby</i>	Parsons, Stephen W	Parsons, Stephen W	Parsons, Stephen W	Benjamin, Tiana	Bubblehead Productions	Horror	2007
<i>Witch House: The Legend of Petronel Haxley</i>	McCarthy, Mike	Stalker, Geoff	McCarthy, Mike	Fellows, Bill	Ironopolis Film Company	Horror	2008
<i>Witches Hammer, The</i>	Eaves, James	Tennant, Laura	Eaves, James	Coulter, Claudia	Amber Films	Horror	2006
<i>Withycombe Running</i>	Boyles, Jack	Boyles, Jack	Boyles, Jack	Boyles, Jack	Media Jacks Ltd UK	Comedy	2009
<i>WMD</i>	Holroyd, David	Hartland, Christine	Holroyd, David	Lenagan, Simon	WMD Film Ltd.	Thriller	2008
<i>Wo ishg jo humse rooth gaya</i>	Khaliq, Yusef	Khaliq, Yusef	Shaboroz, Fadia	Nabeel, Fadia	Vision Entertainments	Drama	2005
<i>Woman in the Fifth, The (aka La femme du vene)</i>	Pawlikowski, Pawel	Benjo, Caroline	Kennedy, Douglas	Hawke, Ethan	Haut et Court	Action	2011
<i>Woman in Winter, A</i>	Jobson, Richard	Atkins, Chris	Jobson, Richard	Fleming, Jason	Vestry Films	Drama	2004
<i>Women and Children</i>	Mitelpunkt, Daniel	Mitelpunkt, Daniel	Mitelpunkt, Daniel	Doyle, Mark	Day For Night Films	Drama	2011
<i>Wonderland Experience, The</i>	Hardyment, Ben	Hardyment, Ben	Brown, Andrew	Branche, Derrick	Urban Eye Films	Adventure	2002
<i>Wooden Camera, The</i>	Wa Luruli, Ntshavheni	Delahaye, Olivier	Buclet, Yves	Singo, Junior	Tall Stories	Family	2003
<i>World Unseen, The</i>	Sarif, Shamim	Kattan, Hanan	Sarif, Shamim	Ray, Lisa	Enlightenment Productions	Drama	2007
<i>Wreckers</i>	Hood, Dictynna	Onwurah, Simon	Hood, Dictynna	Foy, Claire	Likely Story Limited	Drama	2010
<i>Writing on the Wall</i>	Peterson, Nick	Norwood, Tom	Peterson, Nick	Joseph, Mark	EdgImageBank	Action	2008
<i>Y Lleil (aka The Others)</i>	Williams, Emyr Glyn	Williams, Emyr Glyn	Williams, Emyr Glyn	Green, Rhian	Ankst Musik	Drama	2005
<i>Yam</i>	Garden, Angel	Garden, Angel	Garden, Angel	Mead, Alison	Amazon Films	Comedy	2004
<i>Yasmin</i>	Glemaan, Kenny	Hibbin, Sally	Beaufoy, Simon	Panjabi, Archie	Parallax Pictures	Drama	2003
<i>Yes</i>	Potter, Sally	Sheppard, Christopher	Potter, Sally	Allen, Joan	Adventure Pictures	Romance	2004
<i>Yoof Projekt</i>	Southern, Stephen	Meagher, Paul	Meagher, Paul	Brown, Luke	Voo Doo Doll Productions	Comedy	2010
<i>You're Fired</i>	Harris, Dean	Sunley, Danny	Sunley, Danny	Sunley, Danny	Cappuccino Studios	Comedy	2006
<i>Young Hearts Run Free</i>	Simpson, Andy Mark	Simpson, Andy	Simpson, Andy	Black, Andy	Bede Films Limited	Romance	2011

<u>Title:</u>	<u>Director:</u>	<u>Producer:</u>	<u>Screenwriter:</u>	<u>Cast (Top Billed):</u>	<u>Production Company:</u>	<u>IMDb Genre:</u>	<u>Year Finished</u>
<i>Yours Emotionally!</i>	Rangayan, Sridhar	Kamatkar, Nirranjan	Kamatkar, Nirranjan	Lamport, Jack	Wise Thoughts	Drama	2005
<i>Zemanovaload</i>	Rothwell, Jayson	Rothwell, Jayson	Rothwell, Jayson	Byrne, Ed	Zema Productions	Comedy	2005
<i>Zombie Diaries, The</i>	Gates, Kevin	Gates, Kevin	Gates, Kevin	Jones, Russell	Off World Films	Horror	2006
<i>Zombie Hunter, The</i>	Yildirim, Kemal	Yildirim, Kemal	Yildirim, Ali	Chippindale, Jennifer	Knight Productions 2000 Ltd UK	Horror	2011
<i>Zombie King, The</i>	Belizaire, Aidan	Evans, Rebecca-Clare	Evans, Rebecca-Clare	Furlong, Edward	Northern Girl Productions Ltd UK	Comedy	2012
<i>Zombie Undead</i>	Rhys, Davies	Rhys, Davies	Tearse, Kris	King, Ruth	Hive Films	Horror	2009
<i>Zombie Women of Satan</i>	O'Brien, Steve	O'Brien, Steve	Speed, Warren	Speed, Warren	24:25 Films Ltd UK	Horror	2009
<i>Zonad</i>	Carney, John	Guiney, Ed	Carney, John	Murray, David	Element Pictures	Comedy	2009

APPENDIX B: Case study London to Brighton



London to Brighton

A case study in British low-budget film

BBFC rating: 18 [UK] R [US] Genre: Crime drama Theatrical release: 2006

Producer(s):	Paul Andrew Williams, Alastair Clark, Ken Marshall, Rachel Robey,
Director:	Paul Andrew Williams
Writer:	Paul Andrew Williams
Editor:	Tom Hemmings
Cast:	Lorraine Stanley, Georgia Groome, Johnny Harris
Locations:	London, Brighton
Running time:	85 minutes
Production company:	Steel Mill Pictures and Wellington Films
Format:	16mm (mostly hand-held)

Description:

Neither a genre film as defined in Appendix E, nor a gangster movie, this gritty crime drama is about a 12-year-old runaway girl named Joanne, who is lured by a prostitute, Kelly, into having sex with a violent mobster. The mobster also happens to be an elderly paedophile and after he is killed; the gangster's son forces Kelly's pimp to find the girls. The film follows the girls as they escape London in the wake of what has happened.

Overview:

In some ways *London to Brighton* is a typical product of modern low-budget British filmmaking, a cross-genre piece made on a shoestring budget with mainly unknown actors. What distinguishes it from other films in the same category is that it is a well-crafted film that has gone on to provide a showcase for all those involved, in particular its writer, producer and director Paul Andrew Williams. A tight script, solid acting, an engaging score and judicious editing by Tom Hemmings (*Adulthood*) are all facets of this professional, yet disturbing film.

Although the initial production budget was obtained with venture capital backing, like most low-budget British films *London to Brighton* was created 'on spec' and any commercial

objectives for this picture were clearly secondary. The main focus for the film's producers was to bring the creative vision of its director to fruition, a goal they partially achieved by the early part of 2006. However, due in part to the use of 16mm as the recording format, and to the inevitable complications that result from a limited budget, the first capital investment was exhausted before the negative was technically suitable for distribution. As a result, with only a rough cut and score completed, the producers turned to the UK Film Council (UKFC).

In June 2006 the UK Film Council awarded Steel Mill Pictures a cash injection to complete postproduction of *London to Brighton*. Now, with the film finished and the UKFC's full support assured, a domestic distribution deal was signed with Vertigo Films and a targeted festival campaign was started. By December 2006 the film had already screened in five major festivals and won five prestigious awards. In the meantime, Vertigo took advantage of the publicity and critical acclaim the festivals provided and began a limited cinema release with a £40,000 P&A grant from the UK Film Council. Both the distributor and the UKFC viewed this campaign a 'success' after the film achieved a box office ranking of 18, which equated to US\$348,245 in total receipts, and was playing in 19 theatres across five cities.

In the years since, the film has gone on to be distributed in six other territories and to obtain a DVD release in the UK, US, Canada and the Nordic countries. Total world-wide box office returns amounted to half a million dollars, which is roughly equivalent to its final production costs (including marketing). Together with domestic broadcasting rights it is still unlikely that the film has 'broken even' for its investors, but it is possible that the UKFC, in its role as an investor, might have achieved a return.²⁵⁸

From a 'cultural contribution' perspective, the movie has achieved a level of notoriety from the non-UK festivals and foreign theatrical releases it achieved. Furthermore, the film was the career breakthrough for the British director, editor, composer and lead actor and can therefore be viewed as a testament to the film's contribution to British filmmaking talent.

It could be argued that *London to Brighton* did reach its full commercial potential. The difficult subject matter of its narrative and lack of known cast would always have prevented a wide theatrical release, even in its 'home' market. What is also clear is that without the financial investment and marketing support from the UKFC the film would not have had the technical opportunity to be screened in cinemas or to have gained domestic distribution.

History:

Paul Andrew Williams, the director of *London to Brighton*, began his film career as an actor trying to play bit parts in various television programmes, but eventually moved into writing and directing short films. In 2001 he wrote and directed the short film *Royalty* that would later form some of the creative inspiration for *London to Brighton*. *Royalty* premiered at the London Film Festival in 2001, played on UK television and consequently screened at BAFTA. While unemployed and trying to develop another £2.5 million feature, Williams decided to attempt a longer version of a *Royalty*-type low-budget film that would be easier to finance. While on a weekend trip to Devon to see his parents, he spent the time writing the script of *London to Brighton* and, aside from a few scenes that needed to be 'switched around' for the non-linear flashbacks, the script was essentially complete.

²⁵⁸ This assertion is based on the 'five bites rule' noted in *Distribution and exhibition patterns of UK films* (Crissey 2011: 16).

Despite the incredibly short 72-hour period for story development, the script was a quality thriller set in London's murky underworld and in an out-of-season Brighton. While the script evokes British classics of old, especially *Mona Lisa* and *Get Carter*, it has a voice distinctly its own. The 'art house-like' subject matter of paedophilia, underage prostitution, drugs and torture was never considered commercially oriented, and even Williams would later say how surprised he was that the movie became one of the most celebrated British films of 2006.

With the script complete, Williams turned to Tony Bolton, who had funded some of his shorts and would later become the film's executive producer. Bolton responded positively to Williams's proposal to take a 50% ownership in the production company in return for providing the £80,000 venture capital needed to make the movie and, after a four-month pre-production period, principal photography was started.

During the shoot numerous creative compromises had to be made to make best use of the budget. Williams did manage to shoot the picture on film rather than digital tape, using a hand-held 16mm camera, but had to defer his own fee in order to do so. As a result, Williams claimed unemployment benefit throughout the production and every possible cost-cutting measure in the shoot had to be taken. An example of this was how the homes of investors and people working on the film were used as filming locations and accommodation. On many occasions the crew would literally turn up on the day without knowing where they would be shooting. The production schedule was also grueling and included days where there were four hours of travel and 18 hours of shooting.

After the production was in a rough-cut state and the score completed, the producers finally exhausted the production budget. A new investor had to be found urgently to provide the necessary completion funds, so Williams and Bolton decided to approach the UKFC. Paul Trijbits, head of the Council's New Cinema Fund, was supportive and in June 2006 the Williams-Bolton production company, Steel Mill Pictures, was awarded £184,566 to complete postproduction. With the movie finished and the UKFC's full support assured, a domestic distribution deal was quickly secured with Vertigo Films and a targeted festival campaign was initiated. First in this rollout was the Edinburgh International Film Festival, followed in quick succession by the Toronto International Film Festival, the London International Film Festival, the Raindance Film Festival and the Dinard Festival of British cinema. By December 2006 the film had already won a number of prestigious awards and received a considerable amount of critical acclaim. In the meantime, Vertigo took advantage of the free publicity the festivals were generating and, with the help of a further £40,000 P&A grant from the UKFC, started a limited theatrical release in 19 theatres across five cities. Both the distributor and the Film Council considered this campaign a success after the film achieved a box office receipts ranking of 18 and generated US\$348,245 in total revenue. Williams would later reflect that the reception from the Edinburgh festival was the impetus for the agent discussions at the Toronto festival and the subsequent UK theatrical rollout.

The success of *London to Brighton* provided many in the British cast and crew with the chance to begin their professional careers. Williams in particular has built on his experience from the film. After coming 'off the dole', he has gone on to make larger budgeted films, including *The Cottage*, and many of his crew have followed him or gone on to bigger projects with other directors. One notable example is how Georgia Groome's outstanding performance as the 12-year-old lead helped propel her into a full-time acting career that has included playing the lead in Gurinder Chadha's *Angus, Thongs and Perfect Snogging*.

Funding:

Originally an £80,000 total budget was planned, but this turned out to cover only the filming, first edit and scoring. Eventually the UKFC provided an additional investment of £184,566 to complete the legal requirements and ensure that the film was in a technical state ready for distribution. Therefore, for the film to reach the screen, the cost was £260,000, not the £80,000 widely reported at the time in the press. The overall budget was as follows:

Development:	0	
Production:	80,000	(Venture capital – filming, rough cut and score only)
Post-production:	184,566	(UKFC: New Cinema Fund on 13/06/06 – legal, post)
Deferred fees:	N/A	(Breakdown not know)
Total budget:	264,566	
+Festival support:	3,950	(European Film Promotion Grand - €5,000)
+Marketing:	40,000	(UKFC – P&A Fund, Vertigo Films, 22/10/06)

Reviews:

The critical response was generally positive from critics, with review aggregator *Rotten Tomatoes* reporting 71% for positive reviews, based on 24 independent observations.²⁵⁹

‘A gritty British gangster film that leaves a bitter aftertaste, Paul Andrew Williams’ *London to Brighton* is as technically assured as it is ultimately superfluous.’
Hollywood Reporter [US]

‘Get Carter for the 21st Century.’
The Times [UK]

‘With plenty of chutzpah, the young British filmmaker Paul Andrew Williams has written and directed a cracking debut feature with enough clout to kick the door in.’
The Guardian [UK]

‘The film is a calling card for its sure-handed rookie director, Paul Andrew Williams, who expertly turns up the suspense knob while establishing a thick sense of doom amid grimy settings.’
The New York Post [US]

‘The denouement is both surprising and morally complex.’
The Observer [UK]

‘British urban crime movie that is several cuts above the rest.’
Empire Magazine [UK]

Marketing and distribution:

The sequence of events suggests that Vertigo Films may have been approached before the festival circuit, perhaps as early as the application process to the UKFC for completion funds. The speed with which a distribution agreement was achieved, and the speedy commencement of theatrical screenings, suggest significant involvement from the UKFC.

²⁵⁹ London to Brighton Movie Reviews, Rotten Tomatoes. <http://uk.rottentomatoes.com/m/londontobrighton/> [October 7, 2009].

What is clear is that Vertigo Films received a £40,000 cash contribution to boost advertising spend and increase the number of prints. This was undoubtedly a major factor as to why the film gained a UK audience.²⁶⁰ Not unexpectedly, Williams provided a different explanation for choosing Vertigo when he said, ‘I always knew they were great at marketing films and they were very, very, proactive about getting the film, they were very passionate about it and that was what clinched it for them, all the passion they could put behind it.’²⁶¹

After Toronto, Outsider Films was secured for the North America release. No public information is available about Outsider Films or the distributor for the other European territories. Outsider Films apparently went bankrupt in 2008.

UK distributor: Vertigo Films
 US distributor: Outside Films (P&A spend n/a)
 UK DVD distributor: Momentum Pictures

Revenues:

To maximise the use of a limited number of prints, Vertigo Films employed a ‘rolling print’ strategy. This is an approach whereby a small number of prints plays in one city until the screening opportunity in that location ceases, at which stage the distributors transfer those same prints to another city until the exhibitors there stop showing the film—and so on. In this way Vertigo Films maximised the limited P&A budget for *London to Brighton* and kept the film in the British box office charts for a longer period of time. This is not an unusual approach and is consistent with the exhibition strategy many small distributors take with British low-budget features. The final result here is that Vertigo Films was able to keep the movie in the UK box office charts for a respectable nine weeks. At one point, the film was playing at 19 theatres and achieved a box office ranking of 18, totalling US\$348,245.

Weekly UK Box Office Tracking²⁶²

Weekend	<i>London to Brighton</i>								
	Dec 1-3 (Week 1)	Dec 8-10 (Week 2)	Dec 15-17 (Week 3)	Dec 29-1 (Week 4)	Jan 5-7 (Week 5)	Jan 12-14 (Week 6)	Jan 19-21 (Week 7)	Jan 26-28 (Week 8)	Feb 2-4 (Week 9)
UK box office rank	18	18	25	35	29	38	38	42	43
# of theatres	15	19	13	1	5	4	6	6	15
Avg. per theatre (US\$)	3,849	2,847	1,639	6,123	3,562	2,302	1,056	987	400
Gross to date (US\$)	57,740	152,652	218,821	260,076	277,043	303,367	326,239	339,152	348,245

Worldwide distribution revenue was more modest. The figures below are for illustrative purposes only and are translated at the release year’s dollar rate and rounded up.²⁶³

<u>Distribution territory totals</u>	<u>Release date</u>	<u>B.O. gross US\$</u>	<u>As of</u>
<i>United States</i>	08/02/08	6,700	15/02/08
<i>Belgium and Luxembourg</i>	04/07/07	45,905	19/08/07
<i>France, Algeria, Monaco, Morocco & Tunisia</i>	20/06/07	43,151	24/06/07
<i>Greece</i>	26/06/08	1,771	29/06/08
<i>Netherlands</i>	02/08/07	2,088	05/08/07
<i>Sweden</i>	13/04/07	1,821	15/04/07
<i>United Kingdom, Ireland and Malta</i>	01/12/06	348,245	04/02/07
<u>TOTAL BOX OFFICE (US\$)</u>		<u>449,681</u>	

DVD, internet streaming and terrestrial broadcast revenue: unknown

²⁶⁰ *British films to reach more audiences through lottery funding* (UKFC 2009) www.ukfilmcouncil.org.uk/12174 [October 9, 2009].
²⁶¹ *Paul Andrew Williams* (Shooting People 2008) http://shootingpeople.org/shooterfilms/interview.php?int_id=76 [October 11, 2009].
²⁶² *UK Box Office Index for 2006* (Box office Mojo 2007) www.boxofficemojo.com/intl/uk/?yr=2006 [October 10, 2009].
²⁶³ *London to Brighton* (Box office Mojo 2008) www.boxofficemojo.com/movies/?id=londontobrighton.htm [October 7, 2009].

Awards:

The film won a number of awards including a British Independent Film Award for Best Achievement in Production. Paul Andrew Williams won the Golden Hitchcock award at the Dinard Festival of British cinema, the New Director's Award at the Edinburgh International Film Festival, Most Promising Newcomer—Evening Standard British Film Awards, Best Feature Film at the Foyle Film Festival, and a Jury Prize at the Raindance Film Festival.²⁶⁴

Producer's remarks:

‘Well, we just made it because we wanted to make it. That was the only impetus for us.’

‘To be honest, I know I’m where I am through hard work and tenacity, and never giving up. But [the success] freaked me out a lot. I still am a bit humbled by it. I find it a bit uncomfortable.’

‘There [the Edinburgh Film Festival] we started to realise that people liked the film.’

Commentary and Conclusions:

Together with UK broadcasting rights, it is possible that the film ‘broken even’ for its investors, but a more likely scenario is that the UKFC was the only investor that achieved a return. It is also doubtful that the film would have had the opportunity to be made ‘theatrical ready’, or obtained a domestic distribution, if the UK Film Council had not provided the necessary funding, logistical support and representation.

From a British cinema perspective, the film did gain a level of notoriety from the non-UK festival screenings and foreign theatrical releases it obtained. The later success of the editor, director, composer and lead actor also indicates a contribution to British filmmaking talent.

²⁶⁴ *London to Brighton* official website www.l2b-themovie.co.uk [October 7, 2009].

APPENDIX C: The unsuitability of the value chain model

Arguably the most prominent commercial analysis method to emerge in the global motion-picture industry over the last twenty years is the value chain model. First achieving wide acceptance in the mid 1980s as a generic tool to assist companies with the assessment of their strategic options, the value chain is now used by a small, but increasing, number of public and private-sector film-associated organisations. Public-sector agencies, such as the government of British Columbia and the British Film Institute (BFI), now incorporate ‘value principles’ into their strategies, or make ‘value chain’ references.²⁶⁵ Industry associations, too, are moving in a value-chain direction. For example, the Producers’ Alliance for Cinema and Television (PACT) and BECTU have consistently alluded to the value chain in their stated positioning.²⁶⁶ Some of this momentum can, no doubt, be attributed to academic endeavours. Well-known media business professors Lucy Küng, Jehoshua Eliashberg and Graham Vickery have all published versions of a ‘film value chain’ model designed for motion-picture industry analysis, while the School of Cinematic Arts at USC and other respected centres of applied film-management practice now include ‘chain frameworks’ in their degrees and producer-training curricula.²⁶⁷ This eclectic group, uniting government, industry and academia, is likely to continue as studio executives continue to use business-analysis techniques in attempting to cope with an ever more complex market. In the meantime, their conclusions have direct relevance to the selection of a commercial analysis methodology for the UK low-budget film sector. Notwithstanding the fact that the value chain is now the pre-eminent model in media business research and commentary, it does possess certain design traits in its pure form that disqualify it from being used to assess some areas of the film industry. To describe these, and subsequently justify a more appropriate model for economic analysis of the low-budget sector, an elementary understanding of the history and structure of the value chain is required.

C.1 The value chain and the value system defined

Originally popularised by Professor Michael E. Porter of the Harvard Business School, the value chain model has for decades been a vital tool in assisting organisations to assess their strategic options. Thousands of firms, from aerospace groups to zoos, small local companies to large multinational corporations, and service providers as well as manufacturers, have contributed to a list of beneficiaries that is as diverse as it is long.²⁶⁸ The model is now a major topic in business literature and the focus of numerous evolving strategies to improve corporate performance.²⁶⁹ This success in management analytics, combined with the market changes affecting the industry, are the reasons why the aforementioned group of executives, associations and scholars now accepts the value chain model as an assessment tool.

²⁶⁵ Specifically, the government of the Province of British Columbia’s *Opportunities for Growth and Competitive Advantage for BC’s Film and New Media Industries* (IAC 2006), the UKFC’s *UK Film: Digital innovation and creative excellence* (2010), their value toolkit called the *Future Film Value Toolkit* (2007) and in their *Statistical Yearbook* (2010).

²⁶⁶ For example, PACT’s 2009 report on the independent production sector (2009) and their *Submission to Digital Britain Review Second Phase* (2009) and BECTU’s *Ofcom consultation* (2007).

²⁶⁷ For example, the USC School of Cinematic Arts (Producing Symposium), the Wharton School’s Media Initiative, University of Pennsylvania (Media and Entertainment Field Projects course), the Film Business Academy at the Cass Business School (The film value chain and business models module) and the Edinburgh Skillset Screen and Media Academy (MFA Advanced Film Practice course).

²⁶⁸ The number and diversity of cases in the application of value-chain analysis is impracticable to detail in this study. However, published case studies on the American Hospital Association, Boeing, British Airways, De Beers, Dell, Intel, Marks and Spencer, the NYSE and London Zoo do provide an indication of the extent of this acceptance among practitioners since the 1980s. As detailed by Gooch & Felfel, endorsement from academics, scholars and consultants is also extensive (2009).

²⁶⁹ An ABI/Inform search on 15/04/09 listed 1973 documents (698 from academic journals and 28 PhD theses since 1987).

Porter first describes the value chain in *Competitive Advantage: Creating and Sustaining Superior Performance* (1985) where his principal assertion is that a firm's success is dependent on its capacity to achieve commercial advantages over its rivals. These 'competitive advantages', as Porter labels them, come in the form of three generic strategies that an organisation can pursue: cost leadership, differentiation and focusing on a narrow segment of an industry. Each of these strategies will be examined in more detail later as they relate to the low-budget sector, but what is of importance at this point is that they continue to be widely accepted, by both business academics and practitioners, as offering an approach applicable to all firms that strive to obtain and sustain profitability.²⁷⁰ Linked to these alternative strategies is the process of selecting which of them is the most appropriate. Porter stresses that this cannot be accomplished by looking at a firm as a whole, but that it requires the analysis of 'many discrete activities a firm performs in making, delivering and supporting its product' (Porter 1985). He labels these activities the 'value chain' since the way raw materials are converted into products people want is by carrying out a sequence of interdependent tasks.

To assist the business strategist in assessing these activities, or 'sub-processes', as some prefer to call them, Porter offers a value chain model centred on the strategically important processes within a single organisation. Observing that few firms in today's economy are able to perform single-handedly every task required to deliver their product or service, he suggests that a company's value chain is often embedded within a larger process system, or 'value system', of vertically aligned firms which, with their own distinct value chains, work collectively towards a single purpose. A simple example of this framework is the Hollywood studio that attempts to gain DVD revenue from its latest blockbuster. Though the studio may have its own value chain for creating and exhibiting movies, it will probably need to secure agreements with other firms, such as DVD suppliers and retailers, to deliver its blockbuster to market and, ultimately, provide value to the customer. Hence, if Porter's terminology is applied strictly, the studio's internal activities constitute a value chain and the collection of all the value chains from other companies makes up a movie value system.

Over time, however, alterations have been made to the way in which strategists use and express the value chain in analysis. Many of these changes are a consequence of shifts in employment practice and channel operation. These also, coincidentally, reflect the personnel profile of the movie industry. They include the rise in non-traditional, full-time employment methods such as freelancing and subcontracting, and the emergence of e-business tools in fulfilment processes. Changes of this nature have prompted media industry analysts to re-appraise the distinction between the value chain and value system and it is now generally accepted that a value chain encompasses all the stages of value addition, whether within one firm or not. Indeed, all the assessments of the motion-picture industry presented in this study represent this view. Despite this trend, there are two reasons why a continued use of Porter's original nomenclature remains suitable for attempting analysis of the global movie industry. First, it is debatable whether the value system in which a production company operates always works towards a common purpose. Secondly, the film producer often has minimal influence over the other value chains in the system. Both assertions are key assumptions used in value-chain phraseology and, for that reason, contrary to contemporary usage, this study will continue to draw a distinction between a value chain and a value system.

²⁷⁰ A comprehensive list is impossible to provide here. However, a 'value chain' search on ProQuest ABI Inform on 5/4/2010 revealed over 3,300 documents in business-related studies focused on value-chain content.

As previously emphasised, the value chain model operates on the principle that ‘every firm is a collection of activities that are performed to design, produce, market, deliver and support its product’ (Porter 1985: 36). Based on this theory, the model specifies nine generic value-creating activities that are categorised as either *primary* or *support* activities. Primary activities are those processes that enable the physical creation of the product or service and include logistics, operations, marketing and delivery services. Support activities provide the structure that enables the primary activities to take place through the provision of infrastructure, human resource management, technology development and procurement activities. All of these value activities, as well as the interdependencies they have in relation to each other, or ‘linkages’, as Porter prefers to call them, can provide potential sources of competitive advantage. Once individual examination of these takes place, coupled with an understanding of the impact they make on industry rivals, strategy can be determined. Since a firm’s value chain may ‘differ in ‘competitive scope’ from that of its competitors’ and each of its activities can contribute to its cost position, both of which are a basis for differentiation, each activity and linkage must be reviewed separately (ibid.: 36). On this point Porter stresses that the model will reflect the total customer value generated only if the analysis is set within the context of an individual firm’s ‘histories, strategies and success at implementation’ (ibid.: 34). The value-chain model was not originally designed to assess an entire industry or group and this probably explains why media academics have ignored its original single-firm design by instead using it as a ‘shorthand’ for depicting the various stages by which a movie is created and delivered to a customer (Kung 2008) (Figure C1).

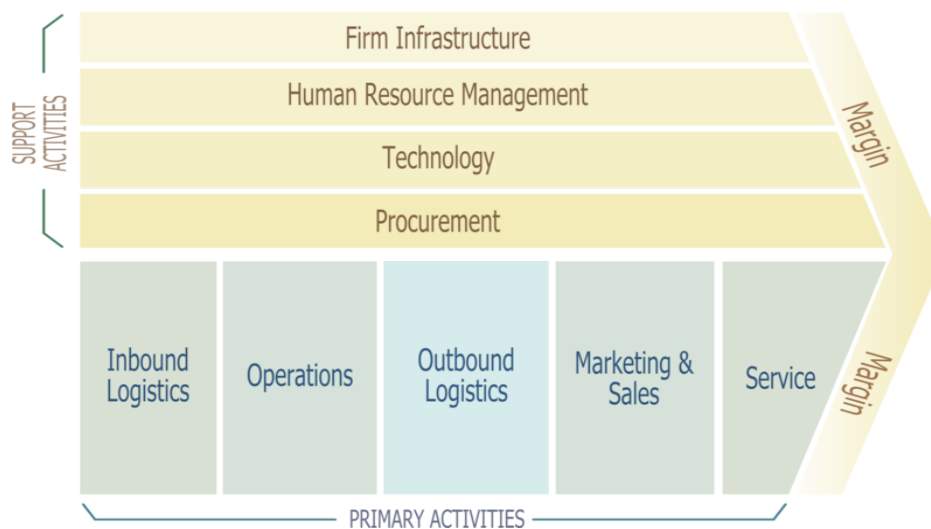


Figure C1 - The value chain concept (Porter 1985)

In addition to the primary and support-value activities, there is also a third element of the model called ‘margin’, which is not an activity but an expression of customer value. Porter describes margin as the value a customer places on a product after paying for the primary and support activities. In an applied sense ‘margin’ means a tool for quantifying the benefits a customer believes he or she has received for a price paid. This can be expressed more vividly by a simple formula in which customer value (V_c) equals customer benefits (β_c) over price (P) and may be stated as:

$$V_c \equiv \frac{\beta_c}{P}$$

In certain instances, when assessing consumer products like toothpaste, margin is not only easy to comprehend but easy to calculate. On these occasions specific costs tend to be readily identifiable and price (P) adjustments are almost always made in response to overt competitor reactions in the market. In other cases, such as entertainment services like purchasing a cinema ticket, customer value is more difficult to calculate quantitatively without using subjective and often spurious data. Viewer surveys have been attempted to address this issue, especially in efforts to value customer benefits (β_c), but these attempts tend to focus on narrative adjustments and not on determining industry contribution. The criticality of the margin component is brought into further focus when considering that it is the only means the value chain framework has for measuring and prioritising a firm's competitive advantages within its wider value system. Though this crucial element does not receive an abundance of explicit attention in Porter's commentary, its importance is implied in every facet of competitive advantage theory. Thus, to omit margin is to ignore customer value, and without customer value, the model's usefulness is significantly weakened.

When a firm is unable to perform all the activities required to deliver a product or service to the customer it has to form 'vertical linkages', or agreements, with other suppliers and or channel firms. As a result, these interlinked value chains become a value system, which in turn can be broken down into supplier value chains, manufacturer value chains, channel value chains and buyer value chains. To illustrate this structure, the Hollywood studio is again a useful example, where camera and film-stock-supplier value chains are considered *upstream value* to the studio because they create and deliver purchased inputs used in its own chain, while channel value chains perform additional 'downstream value' activities that affect the buyer. Examples include those provided by cinema owners and DVD retailers in different countries. From Porter's viewpoint, a firm's product in this process model eventually becomes part of a 'buyer's value chain' in which the needs of the purchaser are assessed and met. Whether or not this actually happens in the motion-picture industry is not explored in this appendix, but it is helpful to note that the whole purpose of performing a value-chain analysis again comes into focus because of the need to measure customer value, using the margin element. As with a physical chain, what is obvious about the value system is that each link is indispensable to achieving and sustaining a competitive advantage. Under circumstances like these, a large movie production company cannot simply rely on its own value chain alone but must manage the value system of which it is part (See Figure C2).

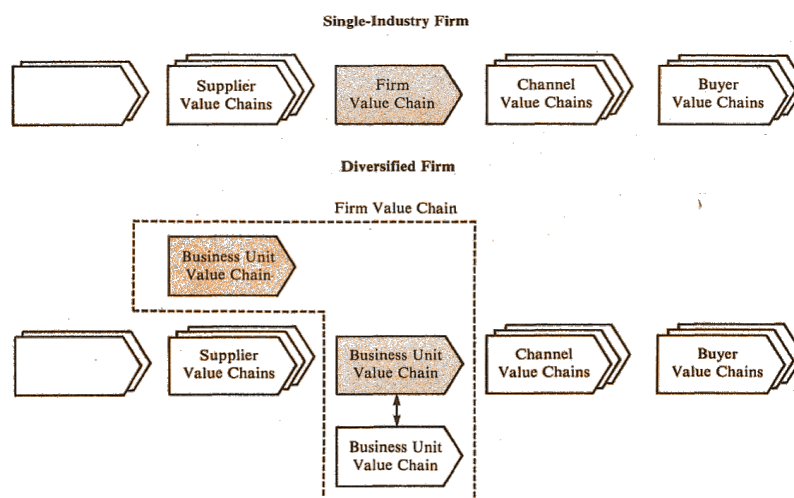


Figure C2 - The value system (Porter 1985)

C.2 Previous attempts at film value-chain research

Over the last ten years nearly a dozen major academic studies have attempted to use a 'film value chain' concept. The most notable of these works are: 'The Motion-picture Industry: Critical Issues in Practice, Current Research and New Research Directions' by Eliashberg et al. (2006), 'Remaking the Movies: Digital Content and the Evolution of the Film and Video Industries' by Vickery and Hawkins (2008), Küng's book, *Strategic Management in the Media* (2008) and Bloore's essay 'Re-defining the Independent Film Value Chain' (2009). Although these studies incorporate a movie value chain framework, their contributions to commercial motion-picture industry analysis vary.

The earliest and most frequently cited of these works is the research study by Eliashberg et al. In this study, the value chain is not used in pursuit of competitive advantages, but as a method for exploration of important issues in US film delivery and for investigation of a number of film-industry matters. Some of these issues have subsequently led to the advancement by other academics of new topics in research. These topics include the process of 'green lighting' scripts for production. From a value chain perspective, this establishes a direct link between the needs of the theatregoer and the requirements of the producer, yet does not attempt an assessment of customer value or of how value can be improved.²⁷¹ The work of Eliashberg and his colleagues is also known for breaking new ground by showing the impacts of the digital revolution on production activity processes and forecasting how traditional US studio power structures will persevere. As important as these topics are, what is vital in regard to this study is that Eliashberg et al. never attempt pure value-chain analysis since it does not focus on the competitive advantages and customer value potential of the impacts they explore.

Vickery and Hawkins (2008) and Küng (2008) follow on from the Eliashberg study by taking the value-chain concept in several divergent directions. In both of these cases the value chain model is used to illustrate differences in the film process system in relation to other media-industry process chains, such as those seen in broadcasting and in music production, while at the same time reinforcing the call for process analysis in the movie business. Küng extends these concepts by describing how various media industries are being impinged on in a number of ways by technology, especially with the emergence of fragmentation, unbundling and non-linear sequences in various media value chains.²⁷² These mark the first attempts to address and define customer value in a film activity process system (Vickery and Hawkins) by including market research activities in the development stage (Küng) and paying attention to general marketing activities after principal photography. However, the value chain models they use to explore these issues are not representative of the majority of firms that are involved with low-budget films. Their textual emphasis is studio oriented and incorporates activities dealing with blockbuster marketing, sequels, franchises, product placement and other mega-budget film elements that are not prevalent in the British independent film sector.

Advancing this concept further is Bloore's attempt to address the imbalance in favour of studio-focused value-chain analysis in a revised model centred on independent films. Taking the perspective of only non-US studio financed movies, his work illustrates how most films are created and delivered through a variety of disparate value systems, involving specialist organisations. Bloore extends Küng's work by proving the impact of fragmentation and the

²⁷¹ Possible research topics include: the process of 'green lighting' (final approval for production) projects to increase the success rate and ROI (cost estimations vs. consumer behaviour forecasting), the use of franchises, portfolio risk distribution by making a group of films instead of specialisation, talent issues, reliance on marketing, release timings and the future use of home cinema options.

²⁷² The terms 'fragmentation' and 'unbundling' describe value systems that are increasing in the number of corporate participants.

fragility of linkages between the script-to-screen activities. In doing so he highlights specific challenges faced by large independent film companies, such as income risk, recoupment flows, talent retention, the value of cast and crew reputations, investment levels and timescale issues. Although it is debatable whether these particular issues should be included in a pure customer value chain study as distinct from a general business-model discussion, he does attempt to explore customer value. Unique among the studies already discussed, Bloore's work fosters the debate on the traditional description of a movie end-customer by including movie critics as well as theatregoers and DVD/download purchasers. In taking this approach, Bloore challenges long-held perceptions of customer identity and inadvertently sets them within the context of today's Web 2.0+ environment where film bloggers, social networking and other movie opinion sites can either make or break a movie. Bloore's work also partially succeeds in distinguishing between the activity processes of independent and Hollywood films—one of his original research aims—but his analysis is still weakened by the same generality of scope that plagues the studio-oriented work of Eliashberg et al., Küng, and Vickery and Hawkins. The independent sector, as interpreted in Bloore's analysis, considers films with budgets of 'millions', and for which many of the activities widespread in larger-budget films are still required, such as dealing with movie stars, library rights and licensing. These tasks are seldom called for in UK independent low-budget productions.

Each of these studies is ground-breaking, exceeds the original aim of its authors and advances commercial movie industry scholarship. However, when considering them, and when taking account of the majority of comparable 'film chain' work not included in this study, it is obvious that a true 'Porteresque model' for the film industry has yet to be made. The evidence for this statement is clear from the fact that none of these studies has been conducted at company level. Aside from Bloore's sector-focused research, previous studies have only been attempted, at an industry level, of process description. That degree of generality makes it difficult to pinpoint customer-value enhancements and competitive advantages from analysing linkages in the movie delivery process. True, many of these studies do discuss 'customer' and 'value' but they never attempt to quantify them by using competitive advantage theory. This is not to suggest that their research is in any way compromised, and indeed it has already been stated that this is not the case. Nevertheless, this does suggest that the search for customer value was never an aim of these authors.²⁷³ Both Küng and Bloore specifically acknowledge this by confessing that their models are 'shorthand' for describing the activity flow of movie delivery instead of the competitive advantage tool Porter had originally designed. In actuality recent media business researchers have always abandoned the value chain model's true purpose and instead used it as a euphemism for collectively describing the individual stages of the script-to-screen process. Needless to say, the fact that a pure Porteresque model has yet to be shown does not, in itself, disqualify it from being achieved in the future. However, it does raise the question as to whether the model's original parameters prevent it from ever being used effectively to improve customer value and increase competitive advantage within the film industry.

C.3 Limitations of the film value chain in industry-wide analysis

It has been alleged that 'no two films are alike' and although this phrase is probably used out of its original context here, it does support the reasoning behind a key element in Porter's competitive advantage theory. As detailed earlier, in order for a firm to improve its financial position relative to a competitor, any potential advantages it has, or can have, in costs, product differentiators or in taking a niche market focus, must be identified before being

²⁷³ Their description often resembles the same process used in *The Guerilla Film Makers Handbook* (Jones and Jolliffe 1996).

incorporated into strategy (Porter 1985). The value-chain model was designed as a tool for this purpose, but only in relation to assessing a firm's production and delivery processes. Apart from the occasional exception, such as in a monopoly, an industry comprises various sectors that tend to use many different, and often individually unique, approaches to delivering customer value. This is why industry-wide value-chain analysis offers too broad a means of finding sources of advantage. Be that as it may, the aforementioned body of film value-chain research suggests that industry-wide and sector-level analysis can be useful in providing an understanding of the commercial aspects of motion pictures. Furthermore, there is no research-supported reason why the concept of competitive advantage must be restricted to single-firm analysis. As long as competitive advantages can be identified, it is conceivable that the scope of the value chain could be expanded to include industry-level comparisons. Attempting this approach would undoubtedly require the researcher to view the model's original design as guidance in best practice rather than as a restriction. However, even after allowing for this wider adaptation, the model would still need further alteration to allow it to assess an industry that individually crafts each film it produces.

Unlike other entertainment industries—broadcasting and sports entertainment for instance—filmmaking has no one assembly-line process that systematically delivers a continual flow of features. All movies do indeed go through the same general set of activities to reach a cinema but, from an industry-wide view, few consistencies are evident at a discrete activity level. This particular trait of the film delivery process will be explored later in this appendix, but Bloore's study does suggest that mutual activities exist at a sector level. Therefore, if the low-budget sector can be accurately defined, it should be possible, theoretically at least, to propose a generic sector-based film-value-chain model that is more relevant to low-budget film production companies. Yet even if the scope of competitive advantage theory and the single-firm focus of the original value-chain model could be broadened, other issues would remain that would probably prevent its effective use in motion-picture analysis. These relate to matters involving process linkages, the absence of chain bundling, the need to assess margin and the model's inability to deal with works of art.

Linkages and coalitions

As previously described, every studio and independent feature-film company follows the same basic set of procedures in creating a movie and delivering it to a paying audience. This sequence of activities generally includes rights acquisition, script development, project planning, employing cast and crew, filming, editing, print finishing, marketing, distributing and exhibiting. While some of these activities may be omitted, or the sequence in which they occur adjusted, the overall sub-process chain is, in general, approximately the same for every film. The apparent uniformity in this set of actions is only superficial, however, and masks significant variations in the approaches used throughout the industry. These dissimilarities occur at an activity level and happen primarily in the linkages required to ensure that the process chain, and/or system, works seamlessly. Studio films, for example, are delivered either through a process chain, using a single vertically-aligned conglomerate, or by a process system that relies on tightly established coalitions with other media firms.²⁷⁴ The studios, in these situations, have almost complete control over the entire process system and, as a consequence, their films have a superior financial position to those of most independent films. This is because they are able to optimise all their upstream and downstream value

²⁷⁴ Porter emphasises coalitions within the value system. He defines these as long-term alliances with other firms which share the goal of delivering the same product or service to market, but fall short of outright mergers, such as joint ventures, acquisition of licenses and supply agreements (1985: 34). Unless a firm broadens its scope internally, it has to form these coalitions to serve the customer.

processes before filming commences, especially in linkages between finance, production, distribution and marketing activities.

On the other hand, movies that are not studio-financed are usually forced to employ more fragmented process systems that are often characterised by weaker vertical linkages. For the most part, low-budget film businesses have a 'downstream attitude' to their processes in that they consider the next company in the process system as an end customer, rather than concentrating on the eventual cinemagoer. This can often be observed in cases where an independent producer, agent and distributor are legally attached to the same film in a virtual process system, yet continue to use conflicting approaches in their distribution, marketing and exhibition activities. On such occasions, the producer sells a film to distributors, who then sell it on to other distributors in different foreign territories, who in turn sell it to local exhibitors and/or broadcasters. These companies often resist activity-coordination attempts by other firms in their value system, have little motivation to optimise the overall process and probably have conflicting business objectives. This situation has the effect of blurring the concept of who the customer is within a film value-chain concept, since a film is typically made for an audience to enjoy rather than for consumption by a distributor. Recoupment is also a factor and situations involving 'all rights' transactions restrict producers from considering local distribution and exhibitor requirements. Few low-budget producers would publicly admit that their customer is anyone other than the movie viewer, but in reality they are forced by their weak financial position in these situations to consider any opportunity to secure revenue, no matter how ridiculously meagre, including foregoing box-office prospects by accepting an 'all-rights no-upfront payment deal' with a distributor. Taking into account the inherent frailty in every independent film process system, combined with the reality that most UK films are made by independents, there can be little wonder that the British motion-picture industry is often described as a cottage industry.

Fortunately, to the great relief of many British producers, not every independent film has this level of weakness built into the vertical linkages of its process system. Medium-budget producers often strive to mirror the process systems of studio films by attempting to integrate all their process tasks at the beginning of production. These attempts do occasionally succeed in establishing a level of coordination and optimisation similar to that achieved by their larger-budgeted rivals, whereas, low-budget producers often make their films 'on spec' and, as a result, tend to establish their process systems after production has begun, using a 'one thing at a time' approach. In this scenario the establishment of a single-process system that works harmoniously, and in which everyone involved shares the same commitment to providing value to the customer, is practically non-existent. There will always be exceptions to these norms since budget levels do not form the sole determinant for the type of process system used, but what they illustrate is the vast disparity in the vertical linkages and coalitions used by British films. They also demonstrate that the attempted use of value-chain analysis in the low-budget sector remains problematic.

The chain bundling opportunity myth

Although *chain bundling* is not a specific element of the value chain model, one of the possible outcomes of improving a value system is the 'bundling' together of discrete tasks by a single firm expanding the tasks it performs. As illustrated in Chapter Four, the digital revolution enabled single firms to execute the entire process system affordably within their own internal sub-process chains. The capacity to use digital technology from script to screen, bypassing traditional distribution channels, is often touted as the best approach in numerous 'how to make a movie' seminars and books. Feature films such as *Powerless* (2004) and *Evil*

Aliens (2005) are examples of movies that have been produced, distributed and exhibited on various media platforms without ever being screened in a movie theatre. Initially this appears to run counter to the ‘disintermediation’ evidence found in other media-industry value studies, in which the arrival of new technology and deregulated markets is seen to be decoupling specific stages from hitherto tightly linked value chains (Küng 2008).

Disintermediation might be having a significant de-coupling impact on the value systems of studio productions, but new technologies are not having this effect in the low-budget sector. The rise in low-budget films produced and delivered by a single firm demonstrates that decoupling is not happening throughout the entire film industry. Thus, competitive advantage theory could still be considered an appropriate method for assessing the low-budget sector from this perspective. Moreover, producers could conceivably average value across an entire process chain in these situations, thereby avoiding the weak linkages mentioned earlier. Yet even though new technologies do provide small independent film companies with the capability to carry out every task at a relatively low cost, in practice any benefits from this situation are usually counterbalanced by an ever-increasing consumer demand for higher levels of quality. While it may now be technically feasible to use a digital camera and a desktop computer to produce and distribute a feature-film, the final product of such an endeavour rarely matches the needs of a movie viewer. The reason for this is that consumers are continually increasing their minimum requirements as technology advances and, as a consequence, they expect to experience movies in ever more sophisticated and expensive formats.²⁷⁵ In practice, low-budget producers do not usually outsource manufacturing activities that are at a higher cost in order to meet these ever-increasing customer demands. Instead, they usually attempt to ‘make do’ with inferior production elements performed in-house. These in turn negate any advantages gained in bypassing traditional process systems.

The margin element

The imperative to obtain and measure margin is another design element in the value chain model that causes difficulties when attempting low-budget sector assessment. Porter defines margin as the ‘difference between total value and the collective cost of performing value activities’ (1985: 36), but in practice it is much more than just the difference between cost and price. Its real contribution lies in providing the value chain model with its only means of measuring customer value and this directly relates to the profit requirement of companies. With few exceptions, the main reason for-profit companies exist is to generate and maximise profit. Advocates of competitive advantage theory do not overtly discuss this fundamental business requirement but, by including the assessment of margin, they do, provide for it within the value chain framework in a subtle and indirect way. The description of margin in Porter’s model clearly does not directly equate to financial profit in an accounting sense, but it does equal customer value, on which profit is greatly dependent. The logic for this is based on how differentiation and lower costs provide the means to achieving customer value, which in turn generates competitive advantages that ultimately result in profit. This reinforces what has been stated earlier, in that it is impossible to exclude margin from the value chain model without also dismissing the model’s original purpose and the way in which most corporate practitioners use it today.

While the margin element is fairly straightforward to apply in many commercial industry scenarios, it proves much less simple when applied to the film industry. To illustrate this point, consider again the simple formula in which customer value (V_c) equals customer

²⁷⁵ Blue-ray and 3D are two such examples.

benefits (β_c) over price (P). For low-budget independent film companies, the main difficulty arises in estimating the customer benefits (β_c) portion of this calculation because the ambiguity described earlier often occurs in identifying the real end customer and the complexity of defining customer benefits once the end consumer is known. Vickery and Hawkins, later quoted by Bloore, outline this issue when they state:

The unique economic features of the film and video industries stem from the 'experience goods' characteristics of these products, whose market performance depends on complex interactions between psychological, social and cultural factors ... The realisable value of a film is determined largely by intangible assets that have very special characteristics (Vickery and Hawkins 2008:106 and 59).

Here the concept of cost differentiators—a major source of competitive advantage, if seen from a Porter viewpoint—has no direct part to play in this estimation. Vickery and Hawkins argue that strong customer value is not created in films by providing 'good value for money' for the end consumer, but through differentiators to which the low-budget producer usually has no access. When the theatre-goer has the choice of watching two films with the same ticket price, one a blockbuster and the other a low-budget film, customer value cannot be generated for the low-budget film by discovering ways to reduce its entrance price. In this case, customer value must be generated from the emotional response the customer receives after the purchase has been made. Differentiators such as movie stars and special effects, as with many other variables, do indeed come into play, but not in the low-budget sector.

Even if the difficulties in determining customer benefit could be overcome more easily, the concepts of customer value and profit are not always considered a priority in the low-budget sector. This can be attributed to the wide variety of people and organisations investing in the British film industry. Venture capitalists, media conglomerates, private individuals, studios, government bodies, charities and philanthropists are all involved, and this naturally leads to a broader diversity in organisational structures, finance approaches and business objectives being adopted by the firms to which they give support. US studio-backed UK film companies and medium-budget independents linked to larger media firms, such as Working Title, have reliable cash flows that enable them to operate traditional business models predicated on proven profit methods and commitment to customer value. These businesses are forced by their investors to have long-term strategies that incorporate both downstream and upstream perspectives in their process systems. Profits are more readily achieved from the synergies and economies of scale that are made possible through the assembly-line production of medium-to-large budget films, while customer value is proactively attempted by targeting audiences that have been market tested with well-known actors and genres.

On the other hand, low-budget independent film companies do not have access to dependable cash flow, and this inhibits their ability to achieve a profit or consider customer value. These firms tend to be precariously single-project focused, often legally defined within 'single-purpose' limited companies, and produce their films speculatively, a situation which unfortunately limits any opportunity for economies of scale. It is advantageous that the managing directors of these firms often have investors who are not necessarily always driven by profit or market requirements. In fact, some of these companies have no interest in profit or customer value in any business sense whatsoever (Chapter One). For example, production budgets are determined by production requirements instead of profit or ROI potential, pre-production planning rarely incorporates the requirements of target audiences or distribution channels and tried-and-tested approaches, such as using genre, are commonly ignored.

These firms are often ‘tax vehicles’ or ‘cultural experiments’ that satisfy the esoteric needs of their investors instead of any specific business requirement that would be measured by margin in a value-chain analysis. Every British film company that is professional in its operations is likely to share a desire to control the cost of production, distribution and marketing, but such firms are not always preoccupied with the need to address the requirements for maximising the margin element. This industry-wide ambivalence in relation to customer value and the margin element has also direct correlations with the artistic aspects of the film product.

Works of art

In a broad context it is often difficult to discern the differences between products and works of art. For many in the general public, what constitutes a work of art is a matter of personal opinion. Clarity from pertinent academic material is also difficult to obtain in a commercial context, in that there is a lack of consensus on definition and, as a result, examples exist of films that can be categorised as either products or as works of art, depending on the meaning of the terms (Wollheim 1980). That being said, this ambiguity is less relevant in attempts to conduct value-chain analysis of the British film industry, since the primary intentions of the filmmaker are of more importance. In this analysis, a ‘commercial product’ is viewed as something manufactured, for the economic benefit of its maker and/or seller, that satisfies a buyer’s need, whereas a work of art has already been defined as something primarily created to meet the artistic needs of its creator. A movie, as Sir Richard Attenborough once said, is a commercial art form in that it exhibits both the traits of a product and of a work of art (National Heritage Committee 1995: 210). This proves problematic for conducting a value-chain analysis, especially in any case where the film is considered more art than product, since the whole premise of competitive advantage theory is that a firm’s success depends on its competitive situation.

By the nature of their job, producers will always strive to ensure that every stage in the filmmaking process creates value and that their films delight their audiences, but the search for competitive advantages in terms of cost, differentiation and niche focus to increase customer value, and eventually profit, are often not their primary aims. Illustrations of these situations can be found in the firms that make and distribute ‘art house’ films. As the name suggests, these movies tend to be inspiration-led and, this being so, the creators of an art-house film rarely begin their development process by identifying a specific customer need. They may have a particular audience in mind, but this rarely dictates the way in which they design and create their films. More often than not, art-house movies are made ‘on spec’, and the creative inspiration usually originates in the personal creative desires of the producer and/or director rather than coming from any market requirements per se. Aside from a small minority of independent features made by an ever-dwindling cartel of British producers, art-house films are rarely intended to create a profit.²⁷⁶ Although there is little public data to support this assertion, as shown in Chapter Six, the distribution rates for low-budget films tend to be very low. Hence, it is reasonable to conclude that media business scholars would not endorse the low-budget film sector as a great profit opportunity.

Further evidence that profit is much less of a priority in the low-budget sector can also be inferred from seeing the types of investors who normally back these films. Government agencies, philanthropists, relatives of the filmmakers and other private, first-time investors typify this group. All may have legal return-on-investment contract clauses but whether they

²⁷⁶ Potential exceptions include films made by British producers Simon Channing Williams, Rebecca O’Brien and UK broadcasters.

really consider their investment to be any more than a gamble would be illogical. Moreover, this list is perhaps more notable for those who are not on it, such as the established film investors, who have consistently made profits. There will always be exceptions to this generalisation but, again, this reinforces the point that essentially traditional business attitudes in beating the competition and providing a return on investment do not exist in all areas of the low-budget film sector. Indeed, much of the motivation behind low-budget film production could be more accurately described as esoteric.

C.4 The ineligibility of the value chain for low-budget film analysis

The value chain model will almost certainly continue to be used for motion-picture industry-level assessment for years to come since it has been consistently effective in portraying the activities and relationships involved in delivering studio-made and supported movies. As a result, many unique issues concerning the commercial idiosyncrasies of professional filmmaking, as well as some of the firms involved, would probably not have been explored without the use of Porter's model. However, one of the results of this trend in media research has effectively been to effectively shift the common use of the value chain from a method of identifying a firm's competitive advantages to a more ubiquitous concept. Just as the business model concept is now regularly equated with anything related to the way a company operates, the contemporary film value chain now resembles a business analysis framework in its normal application. The reason why this is problematic is that the commercial benefits of improving performance through customer value is largely ignored in modern commercial film analysis, with the result that motion-picture executives are not aware of the financial potential Porter's original model could provide their businesses. However, neither this trend nor the underlying focus of the model previously outlined necessarily disqualifies the value chain from ever being used appropriately in the film industry. Studio films are oriented towards making a profit and surely yield opportunities for pure value-chain analysis. The conspicuous nature of this potential is evident in large, vertically integrated media conglomerates, such as the studios, which are characterised by process systems that encourage strong value-generation activities. Other medium-budget independent film sectors might also provide insightful case study opportunities for pure value-chain analysis, but these areas also demonstrate that the value-chain model cannot be universally applied to all types of firms or sectors within the British film industry, especially those that operate in the low-budget film sector.

As the foregoing discussion of the model's limitations indicates, the low-budget sector and the companies that constitute it do not generally provide a suitable subject for value chain model use, particularly when many of the companies in the sector do not have a commercial focus or intent. In essence, UK low-budget firms do not share the same needs or objectives as film companies in other sectors of the motion-picture industry. Because of this, the need to uncover competitive advantages that relate to cost, differentiation and focus, so that customer value and profit margin can be maximised, is not the primary goal for most low-budget film production businesses. It is probable that most British low-budget film producers would still profess a desire to make a profit, but they are equally likely to admit they 'just want to make a flick' as their primary goal, which in itself provides little reason to investigate competitive advantage. The low-budget sector itself is, of course, not a homogenous arm of the industry; it is comprised of a whole host of different firms with different objectives, making different commercial art-form products as diverse as culture, art-house and genre films. While some UK low-budget firms do indeed have a real financial focus, many others do not. In addition to the model's emphasis on determining the competitive advantage of a firm or industry, the aptness of using the value chain on businesses in industries that are not

economically attractive is something that must also be considered. Given the failure rate of firms in the low-budget film sector and the industry in general,²⁷⁷ Porter himself questions the need for analysing firms and industries with low economic attractiveness (1985). This means the low-budget film sector is not an ideal candidate for value-chain analysis; there can be little need for seeking competitive advantage in a financially unattractive industry. Michael Porter's original value-chain model still provides Hollywood studio executives with a powerful tool for assessing their businesses, but for British low-budget firms the search for business improvement, however the film producer may define it, must lie in other more suitable methodologies. In this thesis, a supply chain model is used and the reasoning for adopting that methodology is provided in Chapter Two.

²⁷⁷ Chapter Six provides evidence for a high company failure rate for the sector, based on a low distribution rate. In terms of the evidence for a high company failure rate for the British film industry in general, this can be found in the unpublished Northern Alliance report *The Corporate Finance of SMEs in the UK Film Industry* (2014) based on the Screen Daily article published in 2017 and found here: www.screendaily.com/news/bfi-commissioned-report-critical-of-uk-film-industry-surfaces-after-three-years-/5125012.article.

APPENDIX D: Image quality measurement debate

It is useful to note that ‘number of horizontal lines’ is not the only possible measure of image quality, but it is the generally accepted by enthusiasts. As La Volpe explains, there are two factors that need to be considered when comparing formats: the colour spectrum and the resolution of the image (2009). Although it is acknowledged that colour is important, an image’s resolution is the only factor that has been widely used to compare the quality of different image-capture formats and is also the more likely factor for which people will notice subtle differences in range. Since pixels are the smallest point of data in the digital world, La Volpe argues that it would be logical to compare the pixel counts of different image-capture formats when measuring the quality of their images. Of course, 35mm is an analogue format so there are no pixels to count in their image, but La Volpe navigates around this problem by using an estimate from converted measures, which states that a 35mm frame has three to 12m pixels (depending on the type of negative, lens and shooting conditions). Since an HD image has just over two million pixels (1920 x 1080 scan lines) it would appear that 35mm is superior to even the HD format, but because the human eye cannot see single pixels from a distance this is the point at which using pixel counts as a basis for comparison becomes controversial. Camera manufacturers have long recognised this and devised a parameter called Modulation Transfer Function to measure the sharpness of photographic images and components. This process uses the number of lines instead of pixels as the basis for comparison. Since Modulation Transfer Function is an industry standard, La Volpe promotes it as the best way to compare the different formats and uses the estimates documented by Baroncini et al. (2004) as the basis for comparison (La Volpe 2009). These same estimates are also used in this study. As for the price and weight estimations, these too are subject to criticism since camera packages were often sold with the different accessories, with the result that direct comparisons are difficult to achieve with accuracy.

APPENDIX E: IMDb genre classifications and definitions

The following genre classifications were used by IMDb from 2000 to 2012 (not including documentaries). These classifications were the only options available during that period, but they have since been expanded (adult, music, sport). At the time, it was possible to list more than one genre category, in order of priority, for a single film. Films could also be defined by sub-genre categories under the 'plot keywords' listing. Again, a film could be described by multiple plot keywords. The advice given by IMDb's Help Centre was:

It should be remembered that these definitions are guidelines. No single definition can cover every possible eventuality. Some of these genres are objective; for the others, a little leeway is given. Either way, please try to adhere to the definitions as much as possible. Please note that the genre should relate to the main driving force behind the story arc; any sub-plots may be better represented via keywords (IMDb 2012).

Action – Should contain numerous scenes where action is spectacular and usually destructive. Note: if a movie contains just one action scene (even if prolonged, i.e. airplane-accident) it does not qualify. Subjective.

Adventure – Should contain numerous consecutive and inter-related scenes of characters participating in hazardous or exciting experiences for a specific goal. Not to be confused with Action and should only sometimes be supplied with it. Subjective.

Animation – Over 75% of the title's running time should have scenes that are wholly, or part-animated. Any form of animation is acceptable, e.g., hand-drawn, computer-generated, stop-motion, etc. Puppetry does not count as animation, unless a form of animation such as stop-motion is also applied. Incidental animated sequences should be indicated with the keywords 'part-animated' or 'animated-sequence' instead. Although the overwhelming majority of video games are a form of animation it is in order to forgo indicating this genre when adding them as this is implied by the title type. Objective.

Biography – Primary focus is on the depiction of activities and personality of a real person or persons, for some or all of their lifetime. Events in their life may be re-enacted, or described in a documentary style. If re-enacted, they should generally follow reasonably close to the factual record, within the limitations of dramatic necessity. A real person in a fictional setting would not qualify a production for this genre. If the focus is primarily on events, rather than a person, use History instead. Objective.

Comedy – Virtually all scenes should contain characters participating in humorous or comedic experiences. The comedy can be exclusively for the viewer, at the expense of the characters in the title, or be shared with them. Please submit qualifying keywords to better describe the humour (spoof, parody, irony, slapstick, satire, black-comedy etc). If the title does not conform to the 'virtually all scenes' guideline then please do not add the comedy genre; instead, submit the same keyword variations described above to signify the comedic elements of the title. Subjective.

Crime – Whether the protagonists or antagonists are criminals this should contain numerous consecutive and inter-related scenes of characters participating, aiding, abetting, and/or

planning criminal behaviour or experiences, usually for an illicit goal. Not to be confused with Film-Noir, and only sometimes should be supplied with it. Subjective.

Drama – Should contain numerous consecutive scenes of characters portrayed to effect a serious narrative throughout the title. This can be exaggerated upon to produce melodrama. Subjective.

Family – Should be universally accepted viewing, for example, aimed specifically for the education and/or entertainment of children or the entire family. Note: Usually, but not always, complementary to Animation. Objective.

Fantasy – Should contain numerous consecutive scenes of characters portrayed to effect a magical and/or mystical narrative throughout the title. Note: not to be confused with Sci-Fi which is not usually based on magic or mysticism. Subjective.

Film Noir – Typically features dark, brooding characters, corruption, detectives, and the seedy side of the big city. Almost always shot in black and white, American, and set in contemporary times (relative to shooting date). We take the view that this genre began with *Underworld* (1927) and ended with *Touch of Evil* (1958). Note: neo-noir should be submitted as a keyword instead of this genre for titles that do not fit all criteria. Objective.

History – Primary focus is on real-life events of historical significance featuring real-life characters (allowing for some artistic license); in current terms, the sort of thing that might be expected to dominate the front page of a national newspaper for at least a week; for older times, the sort of thing likely to be included in any major history book. While some characters, incidents, and dialogue may be fictional, these should be relatively minor points used primarily to bridge gaps in the record. Use of actual persons in an otherwise fictional setting, or of historic events as a backdrop for a fictional story, would not qualify. If the focus is primarily on one person's life and character, rather than events of historical scope, use Biography instead. Objective.

Horror – Should contain numerous consecutive scenes of characters effecting a terrifying and/or repugnant narrative throughout the title. Note: not to be confused with Thriller which is not usually based on fear or abhorrence. Subjective.

Musical – Should contain several scenes of characters bursting into song aimed at the viewer (this excludes songs performed for the enjoyment of other characters that may be viewing) while the rest of the time, usually but not exclusively, portraying a narrative that alludes to another genre. Note: not to be added for titles that are simply music related or have music performances in them; e.g., pop concerts do not apply. Also, classical opera, since it is entirely musical, does not apply and should instead be treated as Music. Objective.

Mystery – Should contain numerous inter-related scenes of one or more characters endeavouring to widen their knowledge of anything pertaining to themselves or others. Note: Usually, but not always associated with Crime. Subjective.

Romance – Should contain numerous inter-related scenes of a character and their personal life with emphasis on emotional attachment or involvement with other characters, especially those characterized by a high level of purity and devotion. Note: Reminder, as with all genres

if this does not describe the movie wholly, but only certain scenes or a subplot, then it should be submitted as a keyword instead. Subjective.

Sci-Fi – Numerous scenes, and/or the entire background for the setting of the narrative, should be based on speculative scientific discoveries or developments, environmental changes, space travel, or life on other planets. Subjective.

Thriller – Should contain numerous sensational scenes or a narrative that is sensational or suspenseful. Note: not to be confused with Mystery or Horror and can be accompanied by one (or both). Subjective.

War – Should contain numerous scenes and/or a narrative that pertains to a real war (past or current). Note: for titles that portray fictional war, please submit it as a keyword only. Objective.

Western – Should contain numerous scenes and/or a narrative where the portrayal is similar to that of frontier life in the American West during the 1600s to recent times. Objective.

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Blancanieves (2012) [film] Directed by P Berger.

Bread and Roses (2000) [film] Directed by K Loach.

Brick Lane (2007) [film] Directed by S Gavron.

Buried (2010) [film] Directed by R Cortes.

Cambridge University Sportsday (1903) [film] Directed by S Mitchell and J Kenyon.

Casino Royale (2006) [film] Directed by M Campbell.

Clerks (1994) [film] Directed by K Smith.

Collateral Damage (2002) [film] Directed by A Davis.

Da Sweet Blood of Jesus (2014) [film] Directed by S Lee.

Deep Throat (1972) [film] Directed by G Damiano.

Department Store (1935) [film] Directed by L Hiscott.

El Mariachi. (1993) [film] Directed by Rodriguez, R.

Enchanted April (1991) [film] Directed by M Newell.

The English Patient (1997) [film] Directed by A Minghella.

Enter the Dragon (1974) [film] Directed by M Allin.

Eraserhead (1978) [film] Directed by D Lynch.

The Fall of the Roman Empire (1964) [film] Directed by A Mann.

Festen (1998) [film] Directed by R Vinterberg.

Following (1999) [film] Directed by C Nolan.

Four Weddings and a Funeral (1994) [film] Directed by M Newell.

The Fox and the Hound 2 (2006) [film] Directed by J Kammerud.

Friday the 13th (1980) [film] Directed by S Cunningham.

The Full Monty (1997) [film] Directed by P Cattaneo.

Goodbye, Mr. Chips (1939) [film] Directed by S Wood and S Franklin.

Heaven's Gate (1980) [film] Directed by M Cimino.

Hero (2002) [film] Directed by Y Zhang.

The House of Mirth (2000) [film] Directed by T Davies.

Iron Sky (2012) [film] Directed by T Vuorensola.

The King's Speech (2010) [film] Directed by T Hooper.

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Mad Max (1979) [film] Directed by G Mille.

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Napoleon Dynamite (2004) [film] Directed by J Hess.

Night of the Living Dead (1968) [film] Directed by G Romero.

Open Water (2004) [film] Directed by C Kentis.

Paranormal Activity (2009) [film] Directed by O Peli.

Peter's Friends (1992) [film] Directed by K Branagh.

Pi (1999) [film] Directed by D Aronofsky.

Rescued by Rover (1905) [film] Directed by C Hepworth.

Saw (2004) [film] Directed by J Wan.

Sholay (1975) [film] Directed by R Sippy.

Skyfall (2012) [film] Directed by S Mendes.

Slacker (1992) [film] Directed by R Linklater.

Snow White (1995) [film] Directed by T Hiruma and Takashi.

Snow White and the Huntsman (2012) [film] Directed by R Sanders.

Snow White and the Seven Dwarfs (1938) [film] Directed by W Cottrell et al.

Snow White: A Tale of Terror (1997) [film] Directed by M Cohn.

Spider-Man. (2002) [film] Directed by S Raimi.

Stepping Stones (1931) [film] Directed by G Benstead.

Stranger Than Paradise (1984) [film] Directed by J Jarmusch.

Sunshine (2007) [film] Directed by D Boyle.

The Texas Chain Saw Massacre (1976) [film] Directed by T Hooper.

The Time Machine (2002) [film] Directed by S Wells.

Tram Ride through Sunderland (1904) [film] Directed by S Mitchell and J Kenyon.

United 93 (2006) [film] Directed by P Greengrass.

Zoolander. (2001) [film] Directed by B Stiller.

GLOSSARY

To achieve greater clarity and brevity, the following terms and their definitions are adopted throughout this thesis:

Analogue era – is an arbitrary term defined as all the years filmmaking has occurred prior to 1 January 2000, the start of the digital revolution.

Audience reach – is the total number of times a film has been seen on any platform, legal or not, including any type of exhibition.

Barriers to entry – is an economic barrier that inhibits new entrants from participating in a market. In this thesis the term is used to identify analogue era barriers to entry, such as a prohibitively high-level of initial fixed cost investment, limited access to requisite skills and personnel, lack of appropriate business knowledge, lack of useful relationships and limited access to distribution markets.

Box office receipts/revenue – cinema-owner's revenue from ticket sales. As a rule of thumb exhibitors retain 60% of box office takings and the other 40% is passed on to the distributor. Synonymous with box-office gross and gross receipts.

Cinematograph Films Act 1927 – was an act of parliament designed to stimulate the declining British film industry and is not considered a success by British film historians. It also gave rise to the quota quickie (see below).

Co-production – is an agreement that is legally binding between two or more producers to jointly produce a film.

Completion bond – is a form of insurance whereby the guarantor undertakes to pay all the costs above the agreed budget to guarantee completion and delivery of the film in cases of unforeseen budget overruns. Synonymous with bond or completion guarantee.

Credible source – is defined as any report, article, book, monograph or festival listing that has been published by an industry organisation or individual with an established record in the film industry and is available for peer review and/or public commentary.

Crowdfunding – the practice of funding a venture by raising small amounts of money via the Internet from a large number of people.

D-cinema – the use of all-digital workflows to distribute and exhibit a commercial motion picture. Synonymous with digital cinema.

Dailies – the raw, unedited footage shot on a particular day during the making of a movie. In all-analogue productions, dailies are often reviewed at the end of each day by the director and producer to ensure the scenes shot for the day have been completed.

Data variable or variable – a single piece of data on a film, such as the producer's name or the year it was first screened.

Deferrals – the practice of deferring the financial payment of cast and crew fees until after the film has been sold or when some level of revenue has been received by the producer.

Democratisation – a trend that gives new entrants a greater level of accessibility to the filmmaking process.

Development – a colloquial term for the planning and sourcing sub-processes needed to make a film that usually includes assembling the film package together by securing the rights, script development (and storyboard if applicable), selecting the director and principal actors, creating the budget and finding production finance from third parties.

Digital revolution – the movie industry’s move from analogue technology-based tools and processes to ones based on digital technologies during the first twelve years of this century. The term was first used in the context of low-budget film scholarship by Duncan Petrie in ‘British low-budget production and digital technology’ *Journal of Popular British Cinema*, 5, p. 66). It is accepted that the twelve-year period used in this study would not be recognised by other media academics since the term used for digital revolution is used differently by Petrie, Vastag, Hilbert and López (see bibliography).

Distribution agreements – agreements entered into by the owner of the film regarding the commercial exploitation of a film throughout the world, such as agreements with licensors, licensees, sales agents and broadcasters.

Distribution fee – in most cases expressed as a percentage of film rentals and is a fee that covers distribution costs and is paid by the production company that owns the rights to the film. Can be 25–50% of distribution revenue.

Distribution finance – an advancement of payment to produce a film by an independent distributor in return for the distribution rights in a certain territory.

Distribution revenue – film rentals after advertising and print expenses, typically 25% of the box office gross.

Distributor – usually contracted by the film producer and is responsible for distributing the film to cinema-owners, printing and advertising and collecting distribution revenues.

Dolly – a wheeled platform or cart that is mounted with a camera and used to create smooth horizontal camera movements.

Economies of scale – is a cost advantage that a firm can obtain by maintaining the same level of fixed costs while increasing production only through an increase in variable costs, thus lowering the cost per unit of output.

Equity – an ownership stake in a firm **or** a trade union representing professional performers in the UK.

Exhibitors – movie cinema/theatre owners.

Film festivals – is an organised presentation of movies in one or more screening venues, usually in a single city or region. They are cultural events and should not be confused with film markets (see below).

Film-management – the study of the economic decisions made by motion-picture producers to design, create and deliver a feature-film to a paying audience. This process incorporates all the general management activities related to planning, organising, implementing and controlling needed to produce a product through the supply chain.

Film markets – events where films are sold by distributors and/or producers to exhibitors and/or broadcasters. Key markets include the Marche du Film at Cannes, the Los Angeles Film Market, Amsterdam, Tokyo and Dubai.

Film rental – is the receipts after the exhibitors have taken their share, typically 40% of the box office revenue.

Film rights (IPRs) – there are many different rights associated with a film that can be bought and sold as a feature film moves from its initial cinema release to cable, satellite and terrestrial television and to distribution on video, DVD and internet. Separate rights cover each of these channels of distribution. See rights.

Four-walled – when a producer or distributor hires a movie theatre for a duration and receives all of the box office revenue.

Gap financing – the gap between the film production cost and what rights have been pre-sold plus any guarantees from financiers or distributors; the gap can be funded on the back of the remaining rights to be sold and future profit shares.

Genre – any single category used by a producer, or authoritative source, to describe a movie.

Hollywood hegemony – a concept on how the British motion-picture industry should respond to US studio control of its market.

In-the-can – footage that has been shot to a particular point during the manufacturing sub-process.

Independent film – a production that has not received any direct financing support from a Hollywood studio. Most low-budget films fall into this category.

Low-budget film – a British feature-length narrative live-action movie made for \leq £2.5m. Synonymous with production, feature-film and movie.

Low-budget film sector – the sector of the UK film industry that makes low-budget films. Synonymous with sector.

Minimum Production Cost (MPC) – the minimum cost needed to achieve a particular director's own unique interpretation of a story in a movie.

Mooresque – are technological innovations that result in more improved price-quality ratios in filmmaking tools.

Online illegal film – is a film that has been made freely available on an online peer-to-peer file sharing platform (Limewire, BitTorrent) without the consent of the IPR holder.

Online legal (fee or free) film – is a film that is exhibited via an online platform that has secured the IPR option to do so. To be more specific, an ‘online legal: fee’ film is one that is exhibited via an online platform that has secured the IPR option to do so with the aim to charge customers a fee to view the movie (Distrify, iTunes). An ‘online legal: free’ film is one that is exhibited via an online platform that has secured the IPR option to do so but does not charge customers a fee to view the movie (YouTube, Viemo).

Personal Income Before Housing Costs (PIBHC) – a measure of personal gross income before the deduction for housing costs, direct taxes, national insurance and local taxes. Often used by the Office of National Statistics UK (ONS).

PESTEL analysis – is a framework used to assess change factors in the macroenvironment to identify market trends, strategy alternatives and future business potential. The acronym stands for political, economic, social, technological, environmental and legal analysis.

Pickups – are scenes that have to be shot over again.

Presales – the basic concept of presales is where an independent producer sells various distribution rights, such as for a specific territory or format, before the start of principal photography in exchange for an early payment. Rights are usually sold to a distributor on the basis of the script, the director, budget and cast. The distributor guarantees instalments during the course of production. That guarantee may then be backed by a letter of credit from the distributor’s bank, which the producers can then use to finance the production.

Producer – the person or persons responsible for every aspect of the supply chain process, including planning, sourcing, financing, manufacturing and distributing.

Product traits – is any physical or creative attribute of a film. For example, physical traits such as runtime, budget level and technology used for principal photography, and creative traits such as the type of talent involved and type of content.

Production finance – funds derived from any source that enable the script-to-screen process and that can take the form of investment, loans, distribution advances and guarantees.

Product placement – branded products displayed in a film after the brand-owner has paid a fee to the producer.

Quota quickie – a low-cost, poor-quality film commissioned by American distributors operating in the UK purely to satisfy quota requirements laid out in the *Cinematograph Films Act 1927*. Could be considered a forerunner of the modern day low-budget film and a key point in history that has sense tainted the reputation of the low-budget sector. Synonymous with sector B-films.

Rights (IPRs) – the intellectual property rights to the original master sound and picture negatives of a film include a bundle of copyright rights that include territorial distribution rights. These rights can be in perpetuity, or for a fixed time period of time after which the rights revert back to the producer or rights owner and these ancillary rights can be sold again.

Self-distribution – is when no agent or distributor is involved in the supply chain process and all distribution sub-process tasks are undertaken by the producer or production company.

Soft money – is development, production and/or distribution finance that is provided by the public sector that does not have to be repaid or, if it does, then on a non-recourse basis and on highly favourable commercial terms when compared with financing available from the public sector (bank).

Studios / Hollywood studios / Hollywood system – historically Hollywood-based studios 20th Century Fox, Columbia Pictures, Metro-Goldwyn-Mayer (MGM), Paramount Motion Pictures Group, Universal and Warner Brothers Entertainment, but now also includes the media conglomerates that own them Viacom (Paramount), Comcast (NBC/Universal) and Sony (Columbia), as well as Disney, Dreamworks SKG and many other firms that are either affiliated with these organisation or separately-branded subsidiaries.

Supply chain analysis – is a business term that describes a tool for evaluating the efficiency of a manufacturing process, in particular, the analysis of the organisation structure, people, technology, information and resources involved in moving a product from supplier to customer. The supply chain activities transform raw materials into a finished product.

Supply chain – all the tasks required to conceive, manufacture, distribute and exhibit a low-budget movie. Synonymous with supply chain process or script-to-screen process.

SWOT analysis – is a business term that stands for strengths, weaknesses, opportunities and threats. A common management tool used in strategic planning and evaluation.

Total contribution – the total economic and cultural value of movie or group of movies.

Utilisation rate – is the degree of public exposure a film obtains via any exhibition method. The higher the utilisation rate the likely higher value of the movie.

Value chain – is a business term that describes the chain of activities a firm needs to either facilitate or undertake in order to create pre-measured customer value.

NB: Many of these terms have been adapted from Baillieu and Goodchild (2002: 181–184).

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THE END