



**BFI**

Film  
Forever

# AUDIENCES

**BFI Research and Statistics**

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Image: 12 Years a Slave courtesy of eOne Films

# AUDIENCES

THE AUDIENCE LIES AT THE HEART OF A VIBRANT AND SUCCESSFUL FILM ECONOMY AND CULTURE, YET CURRENT INSIGHT STILL PROVIDES A LIMITED PERSPECTIVE ON AUDIENCE ENGAGEMENT. NEW RESEARCH IS NEEDED TO SHOW THE FULL PICTURE OF THE AUDIENCE ON ALL PLATFORMS.

## FACTS IN FOCUS

- In 2014, 15-24 year olds made up the largest proportion of the UK cinema audience, at 31%.
- UK films were popular across all demographic groups, with a particularly strong appeal for those aged 55 and above. Cinema-goers in this age group also showed a strong preference for UK independent films.
- *22 Jump Street* had the largest above-average audience share among the 15-24 age group, while *Mr. Turner* had the largest share among cinema-goers aged 55 and above.
- A wide range of genres appealed to women, whereas men were drawn to films with a strong action element.
- UK films attracted above-average audiences across the nations and regions with the exception of the South East and West and South West.
- Black and minority ethnic groups were over-represented among cinema-goers, video rental and digital film consumers; disabled audiences were over-represented amongst video buyers.

## AUDIENCES FOR FILM IN THE UK

In earlier editions of the Yearbook, we have been able to estimate the total size of the film audience in the UK based on data from a range of sources. In the last few years, however, while we have been able to track a significant growth in revenues for online services, we have been unable to define viewing figures for films accessed online via streaming or download-to-own, nor have we been able to define viewing figures for films watched on physical video such as DVD or Blu-ray. In 2014, television remained the most popular platform in the UK for watching film, while cinema-going outperformed physical video sales for the third year in a row, since our records began, and remains the largest single revenue source for the film industry.

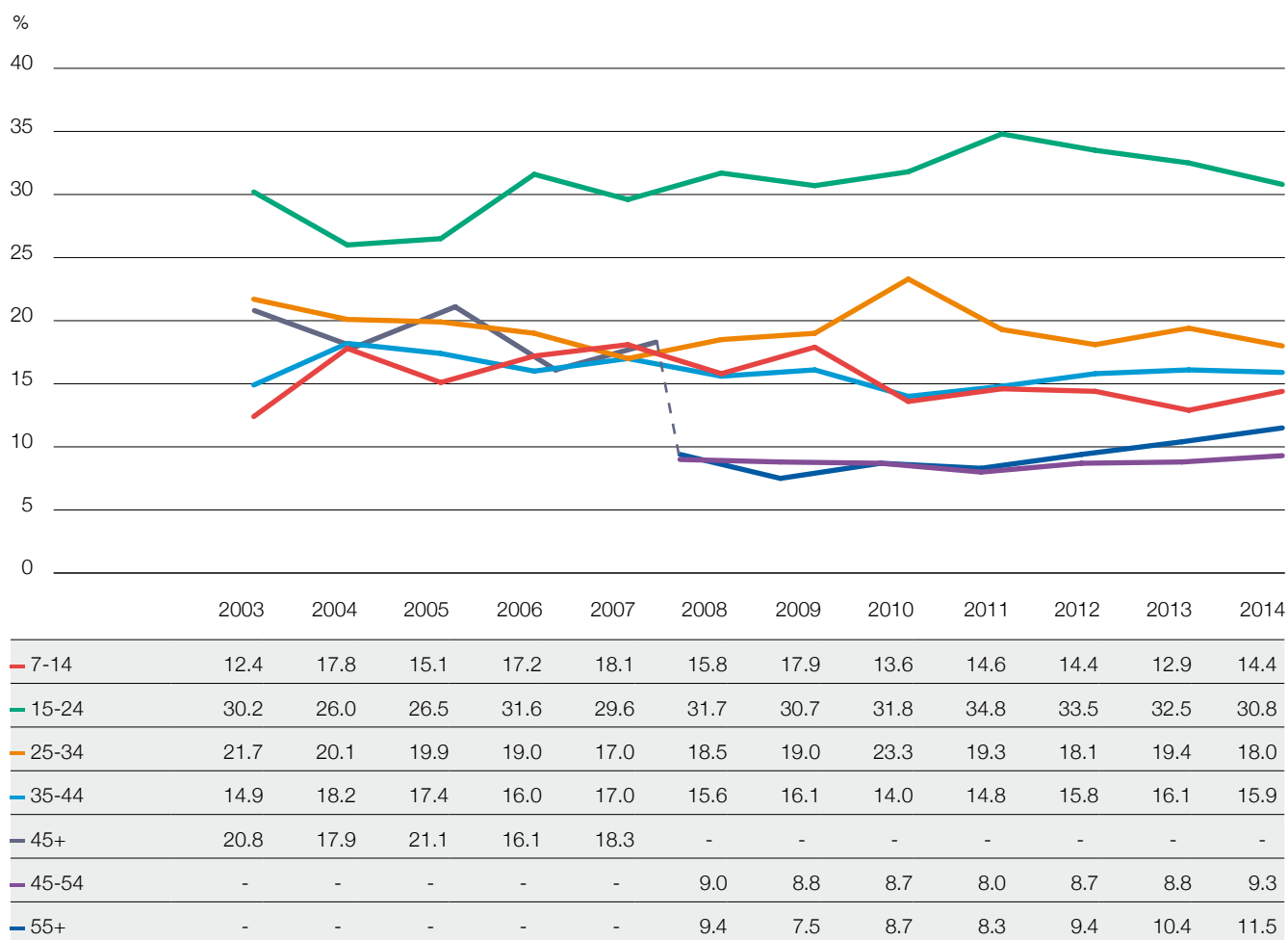
In this report, we look at UK cinema admissions by age, cinema-goers' film preferences by age, gender, geographical location and socio-economic status, and film consumption by ethnicity and disability.

### CINEMA AUDIENCE BY AGE

Figure 1 shows the age trends of cinema admissions from 2003 to 2014. Trends for the 45-54 and 55+ age groups are presented separately for the first time for 2008 onwards, replacing the wider 45+ age group. Now that seven years worth of data are available, we are able to provide a richer picture of cinema admissions, and add value to the age preference tables later in the chapter. The relative proportion of admissions for each category has been broadly similar throughout the time period, with fluctuations based on the release of a small number of successful titles with a strong appeal to particular age groups. However, there was an upward trend in the percentage of the audience in the 15-24 age group between 2005 and 2011 with an increase from 26% to a peak of 35%. Overall, this age group has had the highest proportion of admissions throughout the period. Since 2008, while the share of admissions taken by cinema-goers in the 45-54 age group has remained stable at around 9%, the proportion of admissions for the 55+ age group has shown an upward trend, increasing from 9% in 2008 to 12% in 2014.

Interestingly, the shares of admissions for 7-14 and 35-44 year olds have been very similar which may be due to parents and carers taking their children to the cinema, a finding reflected in the next section showing films with above-average audiences for the different age groups.

**Figure 1 Age distribution of admissions, 2003-2014**



Source: CAA, Film Monitor

Data for 2013 has been updated since the publication of the Statistical Yearbook 2014.

## FILM PREFERENCES BY AGE

Tables 1.1-1.6 outline films with a statistically significant above-average audience share across different age groups to show the range of films that appealed most to each group in 2014. That is to say highlighting films where the difference between the average audience attendance and each age group attendance for a particular film is greater than a standard statistical threshold. UK films had a significant appeal across all age groups, particularly the older age groups.

Family films, fantasies and animations such as *Muppets Most Wanted*, *Maleficent* and *How to Train Your Dragon 2* were of particular appeal to the 7-14 age group. The release with the highest significant above-average audience in this category was the independent UK film, *Nativity 3: Dude, Where's My Donkey?!* (Table 1.1). Comedies and action films appealed most to 15-24 year olds, with *22 Jump Street*, *The Inbetweeners 2* and *Godzilla* attracting the highest significant above-average audiences. Interestingly, the '18' certified *The Wolf of Wall Street* had a high appeal, with 45% of its audience coming from this age group (Table 1.2). *The Wolf of Wall Street* also appealed strongly to 25-34 year olds but action was the most popular genre in this age group, with *Dracula Untold*, *Non-Stop* and *Edge of Tomorrow* all attracting above-average audience shares (Table 1.3). Parents and carers in the 35-44 age group meant that a broad range of genres had significant appeal to cinema-goers in this category. *The Lego Movie* had the highest significant above-average audience share, followed by *The Monuments Men* and *Dracula Untold* (Table 1.4). A wide variety of genres were also popular with cinema-goers in the two older age groups, both of which showed a strong preference for independent UK titles. *The Railway Man* and *Pride* had the two highest above-average audience shares among the 45-54 age group (Table 1.5) while *Mr. Turner* and *The Railway Man* had the two highest shares among 55+ cinema-goers (Table 1.6).

**Table 1.1 Films with a significant above-average audience in the 7-14 age group, 2014 top 20 films and top UK films<sup>1</sup>**

Title	Age group % of film's total audience
Nativity 3: Dude, Where's My Donkey?! (UK)	44
Muppets Most Wanted (UK)	38
How to Train Your Dragon 2	30
The Lego Movie	30
Paddington (UK)	29
Maleficent (UK)	29
The Amazing Spider-Man 2	23
Guardians of the Galaxy (UK)	17
7-14 age group share of top 20 and top UK audience (%)	13
7-14 age group in total survey population (%)	13

Source: CAA Film Monitor

Notes:

1. Audience data were only available for 24 of the 35 'top 20 films and top UK films' released in 2014.

'Audience' in this table and throughout this chapter refers to film-going occasions. That is, if a person went to the cinema to see 10 films in the year, that person would have contributed 10 film-going occasions to the audience figures above, unless otherwise stated. Repeat visits to the same films are not recorded in Cinema Advertising Association (CAA) Film Monitor.

CAA Film Monitor included 95 film titles (mostly mainstream) of the 712 theatrical releases in 2014. The Film Monitor survey is carried out via a fortnightly omnibus survey of over 1,000 adults and children aged 7+, of those who had been to the cinema in the last three months. Films are also age-filtered based on the film certificate.

**Table 1.2 Films with a significant above-average audience in the 15-24 age group, 2014 top 20 films and top UK films**

Title	Age group % of film's total audience
22 Jump Street	68
The Inbetweeners 2 (UK)	49
Godzilla	47
The Wolf of Wall Street	45
The Hunger Games: Mockingjay – Part 1	44
Non-Stop (UK)	42
Dracula Untold (UK)	39
Captain America: The Winter Soldier	37
Interstellar	37
Hercules (UK)	37
Guardians of the Galaxy (UK)	35
15-24 age group share of top 20 and top UK audience (%)	31
15-24 age group in total survey population (%)	32

Source: CAA Film Monitor

See notes to Table 1.1.

**Table 1.3 Films with a significant above-average audience in the 25-34 age group, 2014 top 20 films and top UK films**

Title	Age group % of film's total audience
Dracula Untold (UK)	31
The Wolf of Wall Street	29
Interstellar	28
Non-Stop (UK)	26
Edge of Tomorrow (UK)	24
Transformers: Age of Extinction	22
The Inbetweeners 2 (UK)	21
The Lego Movie	21
X-Men: Days of Future Past	21
The Hobbit: The Battle of the Five Armies	20
25-34 age group share of top 20 and top UK audience (%)	18
25-34 age group in total survey population (%)	18

Source: CAA Film Monitor  
See notes to Table 1.1.

**Table 1.4 Films with a significant above-average audience in the 35-44 age group, 2014 top 20 films and top UK films**

Title	Age group % of film's total audience
The Lego Movie	25
The Monuments Men (UK)	23
Dracula Untold (UK)	22
Muppets Most Wanted (UK)	22
X-Men: Days of Future Past	21
Edge of Tomorrow (UK)	21
The Amazing Spider-Man 2	19
Paddington (UK)	19
How to Train Your Dragon 2	19
35-44 age group share of top 20 and top UK audience (%)	16
35-44 age group in total survey population (%)	16

Source: CAA Film Monitor  
See notes to Table 1.1.

**Table 1.5 Films with a significant above-average audience in the 45-54 age group, 2014 top 20 films and top UK films**

Title	Age group % of film's total audience
The Railway Man (UK)	23
Pride (UK)	20
Mandela: Long Walk to Freedom (UK)	17
Mrs. Brown's Boys D'Movie (UK)	16
Dawn of the Planet of the Apes	15
12 Years a Slave	14
Paddington (UK)	14
45-54 age group share of top 20 and top UK audience (%)	10
45-54 age group in total survey population (%)	10

Source: CAA Film Monitor  
See notes to Table 1.1.

**Table 1.6 Films with a significant above-average audience in the 55+ age group, 2014 top 20 films and top UK films**

Title	Age group % of film's total audience
Mr. Turner (UK)	71
The Railway Man (UK)	53
The Imitation Game (UK)	48
What We Did on Our Holiday (UK)	43
Pride (UK)	39
Mrs. Brown's Boys D'Movie (UK)	34
12 Years a Slave	33
The Monuments Men (UK)	31
Mandela: Long Walk to Freedom (UK)	29
Gone Girl	27
Paddington (UK)	18
The Hobbit: The Battle of the Five Armies	16
55+ age group share of top 20 and top UK audience (%)	14
55+ age group in total survey population (%)	12

Source: CAA Film Monitor.  
See notes to Table 1.1.

## FILM PREFERENCES BY GENDER

The overall audience for the top 20 and top UK films in 2014 had a slight bias towards males who made up 53% of total cinema-goers for these films. On an individual basis, some films attracted substantially more of one gender than the other. Table 1.7 shows the top six films with statistically significant above-average male and female audiences, and the six films that had no significant gender appeal. Films with a strong action element were particularly popular among male audiences with *Fury*, *Interstellar* and *Godzilla* topping the list of films with a greater appeal. Female audiences were drawn to a broader range of films, with *What We Did on Our Holiday*, *Maleficent* and *Nativity 3: Dude, Where's My Donkey?!* having the greatest above-average appeal. Female audiences had a stronger preference for UK films in 2014 compared to males, with all of the top six films with an above-average female audience share being British.

**Table 1.7 Audience gender split, 2014 top 20 films and top UK films**

Significant greater male audience share	Male %	Female %
<i>Fury</i> (UK)	70	30
<i>Interstellar</i>	70	30
<i>Godzilla</i>	69	31
<i>Hercules</i> (UK)	69	31
<i>Captain America: The Winter Soldier</i>	68	32
<i>Edge of Tomorrow</i> (UK)	67	33

Significant greater female audience share	Male %	Female %
<i>What We Did on Our Holiday</i> (UK)	28	72
<i>Maleficent</i> (UK)	29	71
<i>Nativity 3: Dude, Where's My Donkey?!</i> (UK)	35	65
<i>The Railway Man</i> (UK)	38	62
<i>Paddington</i> (UK)	38	62
<i>Muppets Most Wanted</i> (UK)	38	62

Gender difference not significant	Male %	Female %
<i>The Inbetweeners 2</i> (UK)	53	47
<i>The Lego Movie</i>	52	48
<i>12 Years a Slave</i>	51	49
<i>The Hunger Games: Mockingjay – Part 1</i>	51	49
<i>The Imitation Game</i> (UK)	51	49
<i>Pride</i> (UK)	49	51

Source: CAA Film Monitor  
See notes to Table 1.1.



## FILM PREFERENCES BY SOCIAL GROUP

UK films were popular among all social groups in 2014, often attracting a significant above-average audience share. Tables 1.8-1.11 outline the films with the strongest significant appeal to each group in the year.

The AB social group was attracted to a broad range of genres, with *Mr. Turner*, *Gone Girl*, *The Railway Man* and *What We Did on Our Holiday* recording the highest significant above-average audiences. All of the UK films that appealed most to this group were independent titles (Table 1.8).

**Table 1.8 Films with significant above-average AB audience share, 2014 top 20 films and top UK films**

Title	AB group % of film's total audience
Mr. Turner (UK)	55
Gone Girl	45
The Railway Man (UK)	45
What We Did on Our Holiday (UK)	45
Pride (UK)	42
Paddington (UK)	42
The Imitation Game (UK)	41
12 Years a Slave	39
AB share of top 20 and top UK audience (%)	31
AB in total survey population (%)	30

Source: CAA Film Monitor

See notes to Table 1.1.

Only two films, both of which were US studio titles, had significant above-average C1 audience shares: *The Wolf of Wall Street* and *Interstellar* (Table 1.9).

**Table 1.9 Films with significant above-average C1 audience share, 2014 top 20 films and top UK films**

Title	C1 group % of film's total audience
The Wolf of Wall Street	47
Interstellar	41
C1 share of top 20 and top UK audience (%)	36
C1 in total survey population (%)	35

Source: CAA Film Monitor.

See notes to Table 1.1.

Comedy, action, adventure and fantasy films appealed most to the C2 and DE groups (Tables 1.10 and 1.11). *Mrs. Brown's Boys D'Movie* attracted the highest above-average audience for both groups, followed by *Edge of Tomorrow* and *Maleficent* for the C2 group and *Dracula Untold* for the DE group.

**Table 1.10 Films with significant above-average C2 audience share, 2014 top 20 films and top UK films**

Title	C2 group % of film's total audience
Mrs. Brown's Boys D'Movie (UK)	27
Edge of Tomorrow (UK)	24
Maleficent (UK)	24
The Hunger Games: Mockingjay – Part 1	23
Guardians of the Galaxy (UK)	22
C2 share of top 20 and top UK audience (%)	19
C2 in total survey population (%)	18

Source: CAA Film Monitor  
See notes to Table 1.1.

**Table 1.11 Films with significant above-average DE audience share, 2014 top 20 films and top UK films**

Title	DE group % of film's total audience
Mrs. Brown's Boys D'Movie (UK)	30
Dracula Untold (UK)	25
Hercules (UK)	23
Transformers: Age of Extinction	21
The Lego Movie	19
DE share of top 20 and top UK audience (%)	16
DE in total survey population (%)	15

Source: CAA Film Monitor  
See notes to Table 1.1.

## FILM PREFERENCES BY NATION OR REGION

The national/regional distribution of audiences for the 2014 top 20 films and top UK films focuses on releases that attracted an above-average audience in each ISBA television region as defined by the Cinema Advertising Association (for ease of understanding the data are presented by geographic region). Every region had at least two films which attracted an above-average audience, except the North West which had only one top film with a significant above-average audience. UK films attracted above-average audiences in each nation or region apart from the South East and West and South West. Tables 1.12-1.16 show the nations or regions which had three or more films with a significant above-average audience to give an impression of the range of films that appealed most in each area.

In the East of England, all the films with a significant above-average audience were UK films, with *Dracula Untold* and *The Monuments Men* having the most appeal (Table 1.12).

**Table 1.12 Films with significant above-average East of England audience share, 2014 top 20 films and top UK films**

Title	East of England % of film's total audience
Dracula Untold (UK)	14
The Monuments Men (UK)	13
What We Did on Our Holiday (UK)	12
The Inbetweeners 2 (UK)	10
East of England share of top 20 and top UK audience (%)	7
East of England in total survey population (%)	7

Source: CAA Film Monitor.

East of England corresponds to the ISBA Anglia region.

See notes to Table 1.1.

The biopic *Mandela: Long Walk to Freedom* attracted the highest significant above-average audience in London and the home counties, followed by *12 Years a Slave* and *Edge of Tomorrow* (Table 1.13).

**Table 1.13 Films with significant above-average London and the home counties audience share, 2014 top 20 films and top UK films**

Title	London/home counties % of film's total audience
Mandela: Long Walk to Freedom (UK)	31
12 Years a Slave	29
Edge of Tomorrow (UK)	29
Hercules (UK)	28
Dawn of the Planet of the Apes	28
The Amazing Spider-Man 2	27
X-Men: Days of Future Past	26
London/home counties share of top 20 and top UK audience (%)	22
London/home counties in total survey population (%)	23

Source: CAA Film Monitor

London and the home counties corresponds to the ISBA LWT Carlton region.

See notes to Table 1.1.

A UK comedy headed the list of films with significant above-average audiences in Yorkshire and The Humber. The releases with the most appeal were *Mrs. Brown's Boys D'Movie*, *The Railway Man* and *Edge of Tomorrow* (Table 1.14).

**Table 1.14 Films with significant above-average Yorkshire and The Humber audience share, 2014 top 20 films and top UK films**

Title	Yorkshire and The Humber % of film's total audience
Mrs. Brown's Boys D'Movie (UK)	21
The Railway Man (UK)	17
Edge of Tomorrow (UK)	13
Dawn of the Planet of the Apes	12
Transformers: Age of Extinction	12
How to Train Your Dragon 2	11
Yorkshire and The Humber share of top 20 and top UK audience (%)	8
Yorkshire and The Humber in total survey population (%)	9

Source: CAA Film Monitor

Yorkshire and The Humber corresponds to the ISBA Yorkshire region.

See notes to Table 1.1.

The releases with the highest significant above-average audiences in both Wales and Scotland were based on home-grown characters and locations. *Pride* had the largest above-average audience share in Wales (Table 1.15) while *What We Did on Our Holiday* had the largest share in Scotland (Table 1.16).

**Table 1.15 Films with significant above-average Wales audience share, 2014 top 20 films and top UK films**

Title	Wales % of film's total audience
Pride (UK)	13
Nativity 3: Dude, Where's My Donkey?! (UK)	12
Mr. Turner (UK)	11
Paddington (UK)	11
The Hunger Games: Mockingjay – Part 1	10
Wales share of top 20 and top UK audience (%)	7
Wales in total survey population (%)	7

Source: CAA Film Monitor

Wales corresponds to the ISBA HTV region.

See notes to Table 1.1.

**Table 1.16 Films with significant above-average Scotland audience share, 2014 top 20 films and top UK films**

Title	Scotland % of film's total audience
What We Did on Our Holiday (UK)	25
Mrs. Brown's Boys D'Movie (UK)	19
The Monuments Men (UK)	18
The Wolf of Wall Street	12
Scotland share of top 20 and top UK audience (%)	9
Scotland in total survey population (%)	9

Source: CAA Film Monitor

Scotland corresponds to the ISBA Border, STV and Grampian regions.

See notes to Table 1.1.

## FILM AUDIENCE BY ETHNICITY

Looking across film platforms, black and minority ethnic groups (Asian, Chinese, mixed and other) were over-represented among paying theatrical, physical video and digital rental audiences, and under-represented among video buyers, ie they comprised a greater proportion of buyers on these platforms than their proportion of the total population (Table 1.17). White audiences were over-represented among video buyers and under-represented among film consumers on other platforms.

**Table 1.17 Ethnicity of audiences aged 13+ for cinema, rental and retail video and digital, 2014**

	Black, Asian, Chinese, mixed and other %	White %
Population aged 13+	7.8	92.2
Total buyers of cinema, rental, retail and digital film	8.0	92.0
Cinema-goers	10.3	89.6
Video buyers	4.5	95.5
Video renters	9.3	90.7
Digital buyers and renters	8.9	91.2

Source: Kantar Worldpanel

Notes:

Fieldwork took place in March 2015.

Video includes all physical video formats, including DVD, Universal Media Disc, high-definition DVD and Blu-ray.

Digital includes subscription VoD services.

## FILM AUDIENCES BY DISABILITY

As in previous years, disabled people were under-represented across all film platforms with the exception of video sell-through, where they made up over 20% of purchasers (Table 1.18). Disabled audiences were particularly under-represented among cinema-goers.

**Table 1.18 Disabled audiences aged 13+ for cinema, retail and rental video and digital, 2014**

	Disabled %	Not disabled %
Population aged 13+	18.5	81.5
Total buyers of cinema, rental, retail and digital film	17.6	81.4
Cinema-goers	13.3	86.7
Video buyers	20.3	79.7
Video renters	14.5	85.5
Digital buyers and renters	16.0	84.0

Source: Kantar Worldpanel  
See notes to Table 1.17.



21 Stephen Street, London W1T 1LN  
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