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Film
Forever



AUDIENCES

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FACTS IN FOCUS

AUDIENCE FOR FILM IN THE UK

85%

of UK adults watch a **film or movie** at least **once** every **three** months

CINEMA AUDIENCE BY AGE

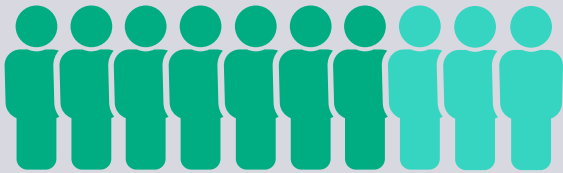
% of average cinema audience



Young cinema-goers outweigh older adults by **3 to 1**

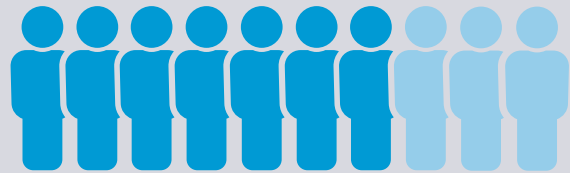
FILM PREFERENCES BY AGE

Youngest skewing title at cinema



7 out of **10** cinema-goers who saw Happy Death Day were aged 15-24

Oldest skewing title at cinema



7 out of **10** cinema-goers who saw Viceroy's House were aged 55+

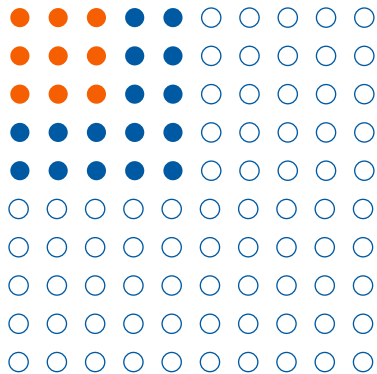
FILM PREFERENCES BY NATION

25%

1 in **4** of the cinema audience for T2 Trainspotting were **Scottish** compared with

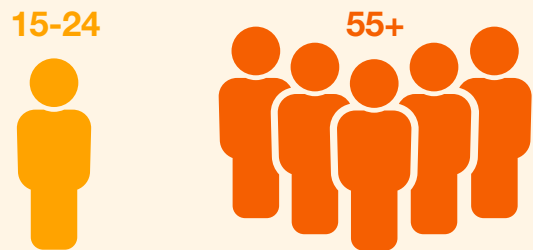
9%

for **all films**



TELEVISION AUDIENCE FOR FILM BY AGE

% of average television audience for film



Older adults who watch films on TV outweigh younger viewers by **5 to 1**

AGE PROFILE FOR FILM AUDIENCES ACROSS PLATFORMS

% of audience aged 18-24

28%



21%



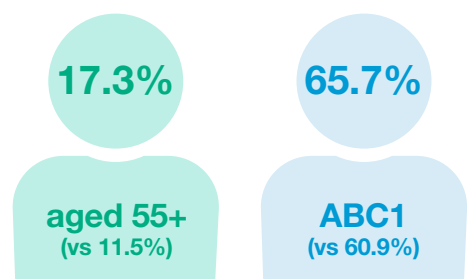
8%



Comparing the three main platforms for film, cinema audiences are the youngest, followed by SVoD and lastly TV.

CINEMA AUDIENCE FOR UK FILMS

% of audience for UK films



UK films at the cinema attract an older and more upmarket audience compared to all films

AUDIENCES

AVAILABILITY OF COMPREHENSIVE DATA ON FILM AUDIENCES

The audience is fundamental to supporting the economic and cultural impact of the film industry, and audiences have more choice than ever before of where, when and how to watch films. As we have seen in other chapters, in 2017 television remained the most popular platform in the UK for watching film while cinema-going remained the largest single revenue source for the film industry.

This year, we have expanded the scope of this chapter to include more data about audiences on platforms for which there have been limited data in the past, in particular services offering OTT Subscription Video on Demand (SVoD) ie VoD services outside those available as part of a pay TV package. However, it is also true to say that across the industry, there is currently still a lack of granular data about the wider world of film and there is no single source study, of which we are aware, that enables comparison of film audiences between platforms and services.

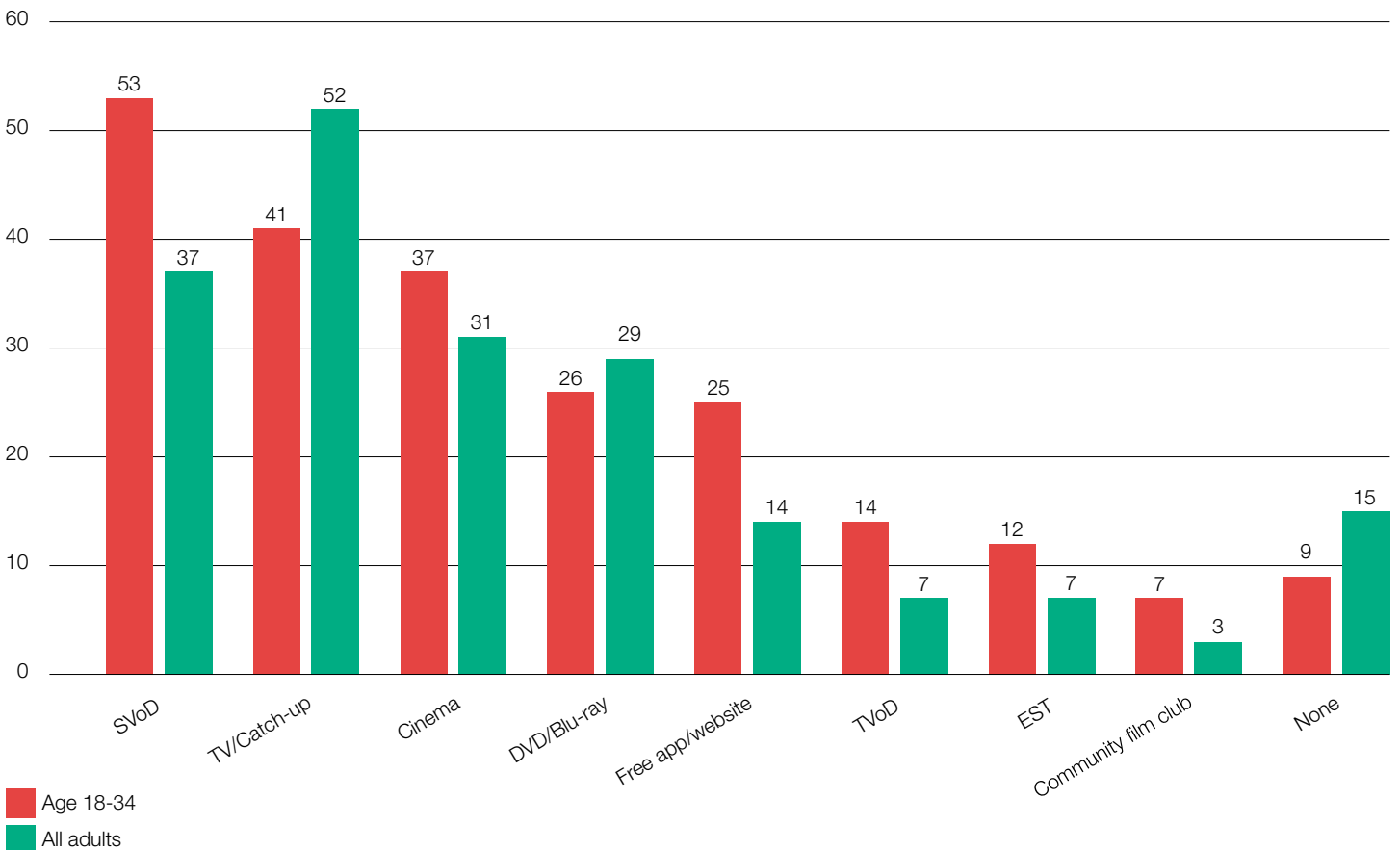
The industry also lacks robust data about the diversity of film audiences. Work is presently underway within the BFI to address this, and next year's Yearbook will thus include analysis of audience diversity in addition to the traditional demographic profiles reported here.

AUDIENCES FOR FILM IN THE UK BY PLATFORM

Audiences for film both at the cinema and at home continue to attract large numbers of the UK population. When asked whether they had watched any film or movie in the previous three months, 85% of the UK adult population responded positively (Figure 1). Whilst amongst all adults, the largest reach (52%) was for films shown on television, the most popular platform amongst 18-34 year olds was SVoD which underlines the disruption to traditional patterns of film consumption which has been driven by the arrival of these services in the UK.

Figure 1 Audiences for film in the UK by platform

% of UK adults



Source: Walnut Unlimited Omnibus Survey, Q1, 2018

Q: In the last three months have you watched a film/movie in any of the following ways? UK adults 18+, Base (2,009)

CINEMA AUDIENCE BY AGE

Figure 2 shows the trends by age for cinema admissions between 2008 and 2017. The age profile over the period shows few marked changes apart from one or two small spikes that reflect the release of a number of successful titles with strong appeal to particular age groups. Overall, there has been a small, but steady, downward trend in the share of admissions accounted for by 15-24 year olds. (The share of the cinema-going audience amongst 15-24 year olds has seen a significant drop over recent decades: in the 1990s this group regularly made up over 40% of the audience whereas in 2017 they represented just 28%, the lowest audience share in the past 20 years.) Nevertheless, 15-24 year olds remain the largest segment of the cinema-going audience and outweigh those aged 55 or over by a factor of almost 3 to 1.

As the chart shows, older (45+) cinema-goers have gradually increased their representation in cinema audiences over the period. It is hard to pinpoint the reasons for this, since the age profile of the UK population amongst this group has been increasing at the same rate as the profile of cinema audiences (around two percentage points in the last 10 years). We might have expected the audience profile in 2017 to have shown an increase in the proportion of 55+ cinema-goers in particular, given the growth in both accessible and 'silver' screenings and the number of films released during the year with appeal to this demographic (*Viceroy's House*, *Their Finest* and *Victoria & Abdul*, amongst others). It is possible, however, that the proportion of cinema admissions amongst this group will increase over coming years as 'boomers' (those born between 1945 and 1960) become more significant within the active retired population.

Figure 2 Age distribution of cinema admissions, 2008-2017

% of group in audience



Source: CAA Film Monitor, based on all films released during 2017 and captured in the Film Monitor Survey 2017. Base: 81 titles, n=126,811

CINEMA AUDIENCE BY GENDER AND SOCIO-ECONOMIC STATUS

Males typically outweigh females in the overall cinema audience and over-index versus their representation in the UK population as a whole. In 2017, males accounted for 52% of all cinema admissions but made up only 49% of the UK population. Table 1 shows, however, that this is not consistent by age group. While cinema audiences drawn from 25-44 year olds skewed strongly towards men, amongst older (35+) audiences, women outweighed men. In this latter group, the proportion of men and women in the cinema audience is thus more aligned to their age profile in the UK population.

In terms of socio-economic status, the average cinema audience attracts a disproportionate share of individuals from the higher social grades in all age groups compared with the general population. This is most marked amongst the older (35+) audience.

Table 1 Cinema audiences by age and gender/social grade, 2017

	Cinema audiences				UK population	
	Age 7-14	Age 15-24	Age 25-44	Age 35+	All 7+	7+
	%	%	%	%	%	%
Males	53	54	56	49	52	49
Females	47	46	44	51	48	51
ABC1	58	57	62	67	62	55
C2DE	42	43	38	33	38	45

Source: CAA Film Monitor, 2017. Base as Figure 2

CINEMA AUDIENCE FOR UK FILMS

This section looks at the audience profile for UK films as a subset of all films. Of the total of 81 films covered by the Cinema Advertising Association (CAA) Film Monitor, 26 were UK qualifying productions, of which nine were UK independent titles.

As Table 2 shows, the audience profile for UK films is slightly different to that for all films. UK films attracted a higher proportion of their audience from the older age groups, particularly those aged 55 or over, reflecting the genres of UK film releases in 2017 which included several period dramas and war films such as *Viceroy's House*, *Their Finest*, *Victoria & Abdul* and *Dunkirk*. UK films skewed very slightly more male than all films, but had a significantly more affluent audience profile than that for all films.

Table 2 Audience profile of UK films compared with all films, 2017

	UK films	All films (including UK films)
	%	%
Age 7-14	10.1	14.3
Age 15-24	24.7	27.8
Age 25-34	18.3	18.5
Age 35-44	17.2	17.3
Age 45-54	12.4	10.5
Age 55+	17.3	11.5
Male	52.4	51.2
Female	47.6	48.8
ABC1	65.7	60.9
C2DE	34.3	39.1
England	83.4	82.7
Scotland	8.9	8.9
Wales	7.7	8.5

Source: CAA Film Monitor

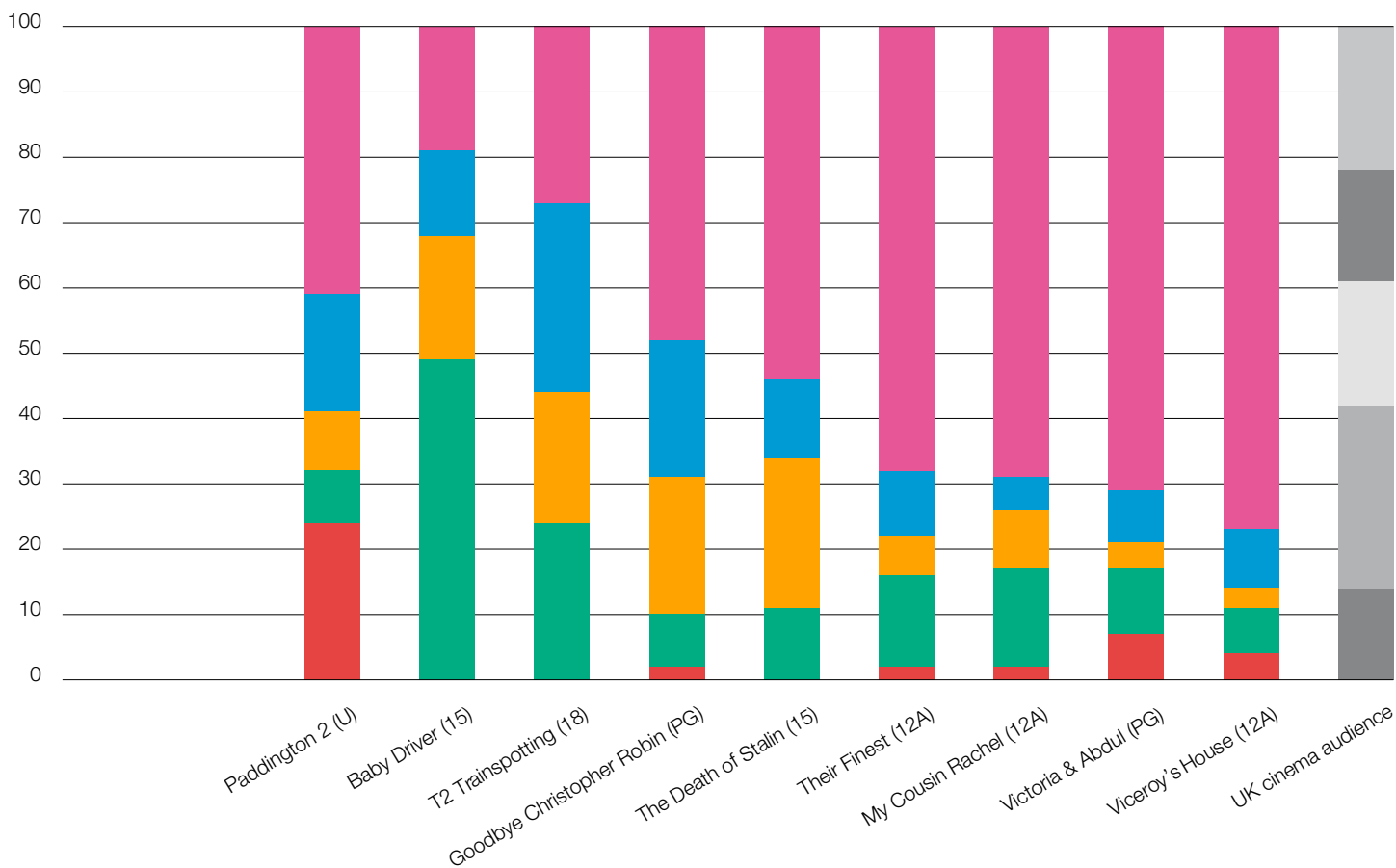
Base: all films, 81 titles, n=126,811; UK films, 26 titles, n=36,266.

The age profiles for the top UK independent films captured by Film Monitor and released in 2017 show they attracted a wide variety of audiences by age (Figure 3). Whilst in general they appealed to a slightly older than average profile, several films, notably *Viceroy's House*, *Victoria & Abdul*, *My Cousin Rachel* and *Their Finest*, all attracted audiences for whom over two thirds of all viewers were aged 45 or over. The following chart (Figure 4) shows that these films also attracted audiences that were very upmarket but also predominantly female.

At the other end of the scale, as might be expected, *Paddington 2* was popular amongst younger audiences, whilst *Baby Driver* and *T2 Trainspotting* both attracted large numbers of 15-34 year olds, more typical of the average cinema audience.

Figure 3 Cinema audience profile by age for the top UK independent film titles, 2017

% of group in audience



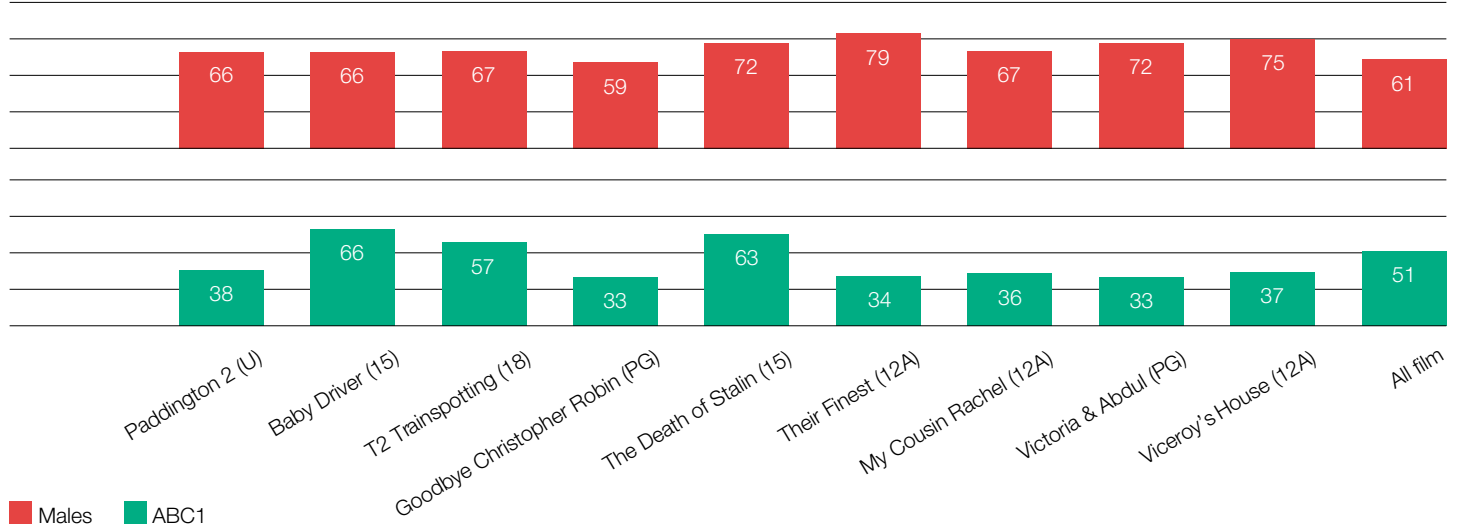
Age 7-14	24	-	-	2	-	2	2	7	4	14
Age 15-24	8	49	24	8	11	14	15	10	7	28
Age 25-34	9	19	20	21	23	6	9	4	3	19
Age 35-44	18	13	29	21	12	10	5	8	9	17
Age 45+	41	19	27	48	54	68	69	71	77	22

Source: CAA Film Monitor

Note: Film Monitor captures nine of the top 20 UK independent films released in 2017 and identified in the Yearbook chapter, Film at the cinema.

Figure 4 Cinema audience profile by gender and socio-economic status for the top UK independent film titles, 2017

% of group in audience



Source: CAA Film Monitor



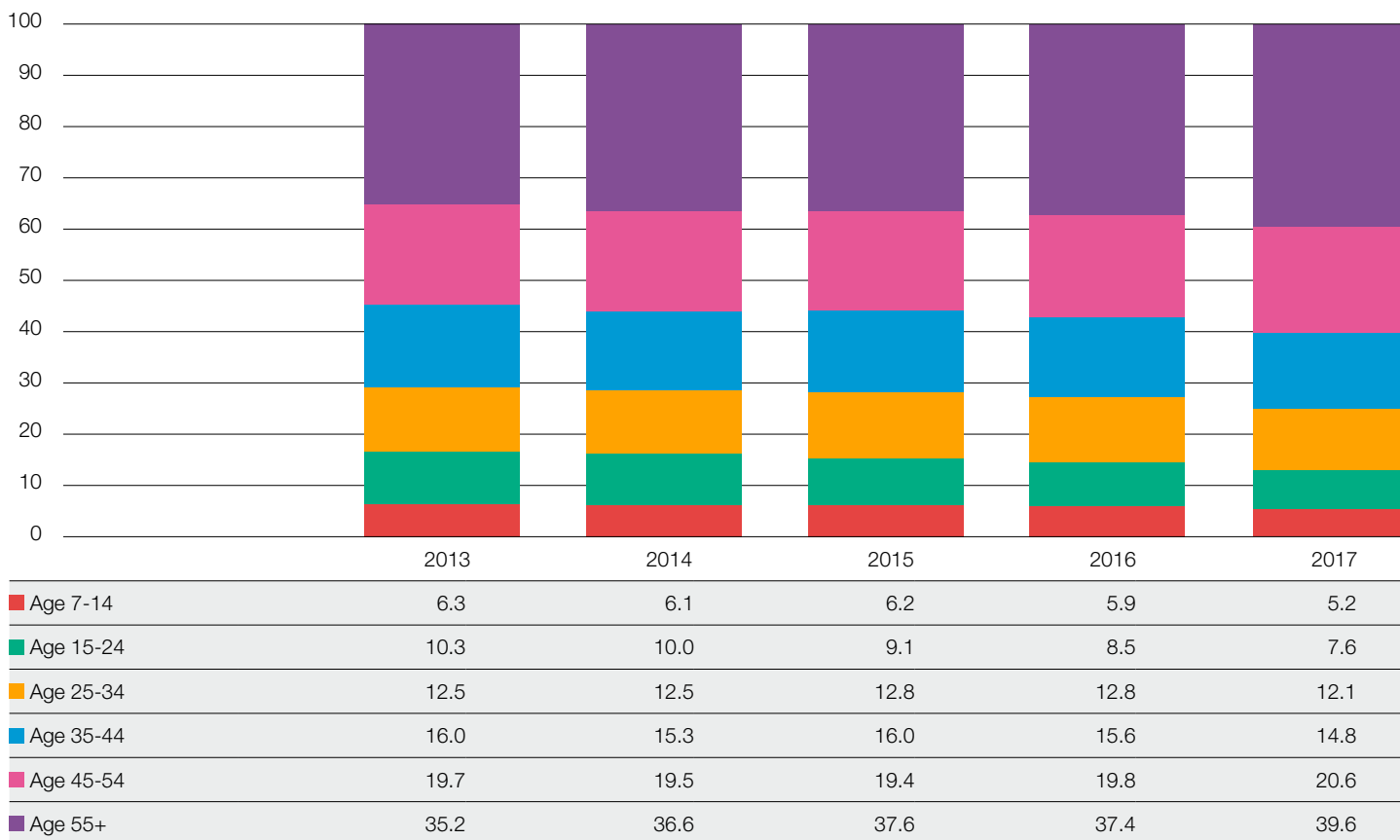
Image: *Viceroy's House* courtesy of Pathé UK

AUDIENCES FOR FILM ON TELEVISION

The age distribution of audiences for film on television shows a slightly different pattern to that of cinema audiences. Generally speaking, individuals who watch films on television tend to be in the older age groups, with more than half the audience aged 45 or over. As with cinema-goers, there is evidence that the television audience is growing older through time, albeit at a faster rate than within the UK population as a whole. As Figure 5 shows, the proportion of older (45+) viewers increased by 4% between 2013 and 2017, while the share of the youngest (7-24) viewers in the data declined at more or less the same rate.

Figure 5 Age distribution of television audiences for film, all channels, 2013-2017

% of group in audience



Source: BARB/TechEdge, 2017, All individuals 7yrs+, Total TV, Filtered on 'cinema film' genre

FILM PREFERENCES BY AGE

Tables 3-8 show the top 10 films with the highest average % of group in the total audience, for six different age groups, for all films released in cinemas in 2017 and captured in the Cinema Advertising Association Film Monitor. This is compared with the equivalent for all films transmitted on any television channel (including pay TV). The data show a measure of preference of the type and range of films that appeal most to each group, indicated by that group's representation in the audience, regardless of how many saw the film in total.

Family films and animated features appealed most to the 7-14 year old age group with three animations – *Sing*, *The Boss Baby* and *Smurfs: The Lost Village* – appearing in both the cinema and television lists. Most of the top 10 preferred television films for this age group were screened on Sky Cinema Premiere, which suggests the value families with young children place on access to the range of content offered by a Sky Cinema subscription. Interestingly, this was the only age group not to feature at least one UK film in either list.

The 15-24 year old age group made up 28% of the average cinema audience in 2017 compared with only 8% of the audience for film on television. Titles offering thrills and spills dominate the list of in-cinema films that appealed most to this group. The release with the greatest appeal was the low-budget horror *Happy Death Day* (one of three titles in the list by horror producer Jason Blum). As viewers of films on television, however, this group showed a marked preference for lighter fare with romantic and action comedies dominating the top 10 list. This dichotomy may be explained by the composition of those sharing the film watching experience, particularly whether made up of friends or other family members. *The Back-up Plan*, a romantic comedy starring Jennifer Lopez, achieved the highest indexing audience for this group on television.

While the top indexing film at the cinema for 25-34 year olds was the 18-rated Saw franchise reboot, *Jigsaw* (which may reflect a continuing loyalty to the series), the majority of in-cinema films with high appeal to this group were action, adventure and fantasy titles, including *The*

Hitman's Bodyguard and *King Arthur: Legend of the Sword*. As with 15-24 year olds, romantic and action comedies outweighed other genres in the top 10 television list for this group. It is interesting to note the presence of a biopic, *All Eyez on Me*, which tells the story of US rapper and actor Tupac Shakur, appearing in the top 10 in-cinema preferences for both 15-24 and 25-34 year olds.

The preferences of the 35-44 year old age group were clearly split between titles they watch as a family and those which they themselves have chosen. This is particularly true of films watched in the cinema where high indexing titles included both *My Little Pony: The Movie* and *Fifty Shades Darker*. *T2 Trainspotting* appears in both the cinema and television top 10s in 2017, suggesting the film clearly has resonance for this audience which would have been in the 15-24 age group when the original film was released in 1996.

A variety of genres were popular with cinema-goers in the two older age groups, both of which showed a strong preference for UK films (Tables 7 and 8). The data indicate that 45-54 year olds may have the broadest taste of all groups in terms of cinema-going: the top 10 cinema list for this age demographic is the least skewed, with the highest indexing title *The Snowman*, attracting less than two in 10 audience members from this group. The opposite is true of cinema-goers aged 55 or over who made up over half the audience for four of their top 10 in-cinema titles and over 70% of the audience for their top indexing film, *Viceroy's House*. On television, the preferences of these two groups included an eclectic mix of films, the majority of which were transmitted on the main terrestrial channels. The most significant difference between the two was a marked preference for older Hollywood classics by viewers aged 55+ compared to 44-54 year olds. (That many of these titles were broadcast in the afternoon highlights the greater leisure time available to viewers in this age group.) The 55+ group was the only age category in the data to over-index on a foreign language title – the North Sea oil exploration thriller *Pioneer* (in Norwegian) which was broadcast on BBC Four.

Table 3 Films with an above-average audience profile in the 7-14 age group, 2017 top films in the cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
Diary of a Wimpy Kid: The Long Haul	53	Top Cat Begins	Sky Cinema Premiere	30
The Emoji Movie	44	Smurfs: The Lost Village	Sky Cinema Premiere	29
Sing	43	Kubo and the Two Strings	Sky Cinema Premiere	29
Smurfs: The Lost Village	42	The Boss Baby	Sky Cinema Premiere	29
The Boss Baby	40	Rock Dog	Sky Cinema Premiere	29
Captain Underpants: The First Epic Movie	39	The Secret Life of Pets	Sky Cinema Premiere	26
The LEGO Ninjago Movie	38	Sing	Sky Cinema Premiere	26
Despicable Me 3	35	Flubber	5Star	26
The LEGO Batman Movie	33	Storks	Sky Cinema Premiere	26
My Little Pony: The Movie	27	The Angry Birds Movie	Sky Cinema Premiere	25
7-14yrs average profile of all films	14	7-14yrs average profile of all films on TV		5
7-14yrs in survey population	10	7-14yrs in total TV audience		4

Source: CAA Film Monitor

Notes:

'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 81 film titles (mostly mainstream) of the theatrical releases in 2017. 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 previous three months. Films are also age-filtered based on the film certificate and the survey does not cover Northern Ireland.

Television audiences are collated from BARB data and cover all films classified by BARB as 'cinema films', which include made-for-TV films, shown on any channel that achieved an average audience of over 250,000. The audience profile is measured at title level, so if a film is shown more than once on a single channel, the audience for that title is averaged across all showings. If a film is shown on multiple channels, eg CBBC and BBC One, then the average is taken for all transmissions per channel (not aggregated across all showings).

Table 4 Films with a significant above-average audience profile in the 15-24 age group, 2017 top films in the cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
Happy Death Day	69	The Back-up Plan	ITV2	30
Baywatch	66	21 Jump Street	Channel 5	29
Annabelle: Creation	63	Love Actually (UK)	Sky Cinema Comedy	29
It	62	War Dogs	Sky Cinema Premiere	29
All Eyez on Me	56	Cheaper by the Dozen	Film4	26
Split	55	22 Jump Street	ITV2	25
Get Out	54	Why Him?	Sky Cinema Premiere	25
Baby Driver (UK)	49	Split	Sky Cinema Premiere	24
Girls Trip	48	Fist Fight	Sky Cinema Premiere	24
The Fate of the Furious	44	American Reunion	E4	24
15-24yrs average profile of all films	28	15-24yrs average profile of all films on TV		8
15-24yrs in survey population	15	15-24yrs in total TV audience		6

Source: CAA Film Monitor

See notes to Table 3.

Table 5 Films with a significant above-average audience profile in the 25-34 age group, 2017 top films on cinema and television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
Jigsaw	32	Dirty 30	Sky Cinema Premiere	46
The Hitman's Bodyguard (UK)	29	This Means War	E4	39
King Arthur: Legend of the Sword (UK)	29	22 Jump Street	ITV2	37
All Eyez on Me	28	American Pie	ITV2	36
The Mummy	28	Sweeney Todd: The Demon Barber of Fleet Street (UK)	ITV2	34
Logan	27	Fast & Furious	ITV2	34
Snatched	27	Mr Right	Sky Cinema Premiere	34
Detroit	27	Friends with Benefits	E4	33
Atomic Blonde	27	Teenage Mutant Ninja Turtles	Sky Cinema Premiere	33
Power Rangers	26	American Pie: The Wedding	ITV2	33
25-34yrs average profile of all films	19	25-34yrs average profile of all films on TV		12
25-34yrs in survey population	14	25-34yrs in total TV audience		10

Source: CAA Film Monitor

See notes to Table 3.

Table 6 Films with a significant above-average audience profile in the 35-44 age group, 2017 top films in cinema and television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
Alien: Covenant (UK)	32	T2 Trainspotting (UK)	Sky Cinema Premiere	37
A Bad Mom's Christmas	29	Rock Dog	Sky Cinema Premiere	37
T2 Trainspotting (UK)	29	Green Lantern	5Star	36
My Little Pony: The Movie	26	Top Cat Begins	Sky Cinema Premiere	36
Peppa Pig: My First Cinema Experience (UK)	26	Underworld: Blood Wars	Sky Cinema Premiere	36
Geostorm (UK)	25	Star Wars: Episode VI - Return of the Jedi	Sky 1	33
Fifty Shades Darker	24	Batman vs Superman: Dawn of Justice	Sky Cinema Premiere	33
The LEGO Ninjago movie	24	Robin Hood: Prince of Thieves	Dave	32
Detroit	23	Ghostbusters	Sky Cinema Premiere	31
Atomic Blonde	23	Star Wars: Episode V - The Empire Strikes Back	Sky 1	31
35-44yrs average profile of all films	17	35-44yrs average profile of all films on TV		15
35-44yrs in survey population	15	35-44yrs in total TV audience		12

Source: CAA Film Monitor

See notes to Table 3.

Table 7 Films with a significant above-average audience profile in the 45-54 age group, 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
The Snowman (UK)	19	Captain Ron	Channel 4	43
A Bad Mom's Christmas	18	Dead Man's Shoes (UK)	Film4	41
The Mountain Between Us	18	The Woman in Black 2: Angel of Death (UK)	Film4	40
The Mummy	17	Purple Rain	Channel 5	37
Paddington 2 (UK)	17	Sex & Drugs & Rock & Roll (UK)	BBC Two	37
My Cousin Rachel (UK)	17	The Man with the Iron Fists	Film4	36
John Wick Chapter 2	16	The Stepford Wives	BBC One	35
Dunkirk (UK)	16	Legion	Film4	35
Jackie	16	Sin City: A Dame to Kill For	Channel 4	34
The Death of Stalin (UK)	15	Jaws 2	ITV4	34
45-54yrs average profile of all films	11	45-54yrs average profile of all films on TV		21
45-54yrs in survey population	12	45-54yrs in total TV audience		18

Source: CAA Film Monitor

See notes to Table 3.

Table 8 Films with a significant above-average audience profile in the 55+ age group, 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
Viceroy's House (UK)	71	A Risk Worth Taking	Channel 5	90
Victoria & Abdul (UK)	56	Lawman	ITV4	87
Their Finest (UK)	54	Kismet	BBC Two	87
My Cousin Rachel (UK)	52	The Great Caruso	BBC Two	86
Jackie	40	Firecreek	BBC Two	86
Murder on the Orient Express (UK)	39	Love is a Many Splendored Thing	BBC Two	86
Lion (UK)	39	Tobruk	ITV4	86
The Death of Stalin (UK)	38	Pioneer	BBC Four	84
Manchester by the Sea	35	The Winslow Boy (UK)	BBC Two	84
Goodbye Christopher Robin (UK)	34	The Young Victoria (UK)	ITV3	84
55yrs+ average profile of all films	12	55yrs+ average profile of all films on TV		40
55yrs+ in survey population	34	55yrs+ in total TV audience		51

Source: CAA Film Monitor

See notes to Table 3.



FILM PREFERENCES BY GENDER

Tables 9-10 show the top 10 films with the highest average % of group in the total audience (aged 7+) by gender for all films released in cinemas in 2017 – and captured in the Cinema Advertising Association Film Monitor – compared with the equivalent for all films transmitted on television. Whilst the overall audience for in-cinema films showed a slight bias to male viewers, those on television skewed slightly to females.

There were distinct differences in film preferences by gender for both films shown at the cinema and those transmitted on television. As in the past, films attracting a predominantly female audience included comedies and dramas with strong female protagonists alongside family and children's films. Three quarters of the cinema audience for the US comedy *Pitch Perfect 3* were female, while four out of five viewers for *Mansfield Park* and *Becoming Jane* (both shown on BBC Two) were female. Four of the top 10 female skewed films in the cinema in 2017 were UK qualifying titles, two of which, *Victoria & Abdul* and *Goodbye Christopher Robin*, were UK independent films.

Males continue to show a preference for, and over index in the audience to, action-driven genres both in the cinema and on television. Four out of five cinema-goers for the Tom Cruise thriller *American Made* were male, while three quarters of the television audience for the superhero film *Green Lantern* was male. Unusually, the top male skewing film preferences include one documentary: *Zero Days*, a film about cyber warfare transmitted as part of the Storyville strand on BBC Four. There were four UK qualifying titles in the top 10 male skewed films shown at the cinema in 2017, all of which were made in collaboration with the US major studios.

Table 9 Films with a significant above average audience profile amongst females (7yrs+), 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
My Little Pony: The Movie	79	Bride Wars	Channel 5	82
Peppa Pig: My First Cinema Experience (UK)	77	Mansfield Park (UK)	BBC Two	80
Beauty and the Beast (UK)	75	Becoming Jane (UK)	BBC Two	80
Pitch Perfect 3	74	Love, Again	Channel 5	80
Fifty Shades Darker	73	Nanny for Christmas	Channel 5	78
Girls Trip	73	The Reckoning	Channel 5	78
A Bad Mom's Christmas	71	Clueless	Channel 4	76
Smurfs: The Lost Village	68	The Young Victoria (UK)	ITV3	76
Victoria & Abdul (UK)	67	Bundle of Joy	BBC Two	76
Goodbye Christopher Robin (UK)	67	The Red Shoes (UK)	BBC Two	75
7yrs+ female average profile of all films	49	7yrs+ female average profile all films on TV		51
7yrs+ female in survey population	51	7yrs+ female in total TV audience		56

Source: CAA Film Monitor
See notes to Table 3.

Table 10 Films with a significant above average audience profile amongst males (7yrs+), 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
American Made	80	Green Lantern	5Star	76
Alien: Covenant (UK)	76	The Outlaw Josey Wales	ITV4	75
John Wick: Chapter 2	70	Slow West (UK)	Film4	73
King Arthur: Legend of the Sword (UK)	70	Sin City: A Dame to Kill For	Channel 4	72
Hacksaw Ridge	69	Monsters: Dark Continent (UK)	Film4	72
Geostorm (UK)	68	Conan the Barbarian	Channel 5	72
Assassin's Creed (UK)	68	Zombieland	Channel 4	70
Blade Runner 2049 (UK)	67	Nymphomaniac: Vol 1	Film4	70
Justice League	67	Zero Days	BBC Four	70
All Eyez on Me	67	Pale Rider	ITV4	70
7yrs+ male average profile of all films	51	7yrs+ male average profile of all films on TV		49
7yrs+ male in survey population	49	7yrs+ male in total TV audience		44

Source: CAA Film Monitor
See notes to Table 3.

FILM PREFERENCES BY SOCIO-ECONOMIC GROUP

Tables 11-12 show the top 10 films with the highest average % of group in the total audience by socio-economic group for all films released in cinemas in 2017 – and captured in the Cinema Advertising Association Film Monitor – compared with the equivalent for all films transmitted on television.

The cinema audience overall tends to skew towards ABC1 viewers compared with the UK population, whereas the profile of film audiences on television is no different to the average total television audience, with a profile skewed more to the C2DE socio-economic group.

UK films released in the cinema in 2017 attracted high proportions of ABC1 viewers with six of the top 10 films amongst this group being UK qualifying productions, of which four were UK independent films. The US biopic, *Jackie*, which tells the story of Jackie Kennedy in the aftermath of the assassination of President John F Kennedy, attracted the most upmarket cinema audience of 2017, with UK wartime drama *Their Finest* and another US drama focused on grief, *Manchester by the Sea*, also almost as equally preferred by the ABC1 audience. On television, two critically lauded horror films, *10 Cloverfield Lane* and *Don't Breathe*, both shown on Sky Cinema Premiere, attracted a high proportion of ABC1 viewers, well above the share for all films on television generally. Two foreign language features from the Danish Department Q series shown on BBC Four, *The Keeper of Lost Causes* and *The Absent One*, also attracted high proportions of ABC1 viewers.

Film preferences at the cinema amongst C2DE audiences covered a mix of genres from the top family film title *Smurfs: The Lost Village* to the low-budget horror film, *Happy Death Day*. The top films on television included action, crime, comedy and horror titles but with a notable absence of the family genre seen in the list of cinema preferences. The top six films on television in particular were overwhelmingly skewed to the C2DE audience with seven out of every 10 viewers from this group in the average audience, with this rising to nine out of 10 for the top film, *Police Academy 5: Assignment Miami Beach*, which was broadcast on Channel 5.

Table 11 Films with significant above-average audience profile amongst ABC1 viewers (7yrs+), 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
Jackie	80	10 Cloverfield Lane	Sky Cinema Premiere	75
Their Finest (UK)	79	Don't Breathe	Sky Cinema Premiere	74
Manchester by the Sea	79	Department Q: The Keeper of Lost Causes	BBC Four	73
La La Land	76	Life	Sky Cinema Premiere	71
Viceroy's House (UK)	75	Bill (UK)	BBC Four	70
Hidden Figures	75	Last Vegas	More4	70
Murder on the Orient Express (UK)	75	Love Actually (UK)	Sky Cinema Comedy	68
Victoria & Abdul (UK)	72	Department Q: The Absent One	BBC Four	68
Dunkirk (UK)	72	84 Charing Cross Road (UK)	BBC Two	68
The Death of Stalin (UK)	72	2001: A Space Odyssey (UK)	BBC Two	68
7yrs+ ABC1 average profile of all films	61	7yrs+ ABC1 average profile of all films on TV		45
7yrs+ ABC1 in survey population	55	7yrs+ ABC1 in total TV audience		45

Source: CAA Film Monitor
See notes to Table 3.

Table 12 Films with significant above-average audience profile amongst C2DE viewers (7yrs+), 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
Smurfs: The Lost Village	59	Police Academy 5: Assignment Miami Beach	ITV4	90
All Eyez on Me	57	Kangaroo Jack	Channel 5	85
Happy Death Day	56	Enter the Dragon	5Spike	84
Annabelle: Creation	54	Eraser	ITV4	83
My Little Pony: The Movie	53	Sleepy Hollow	Channel 4	82
Power Rangers	52	Mutiny on the Buses (UK)	ITV3	79
Peppa Pig: My First Cinema Experience (UK)	52	Millions (UK)	Film4	78
Geostorm (UK)	51	The House of Magic (UK)	Film4	77
The Fate of the Furious	50	Twilight Saga: Breaking Dawn - Part 1	E4	76
Girls Trip	49	Dawn of the Planet of the Apes	Film4	76
7yrs+ C2DE average profile of all films	39	7yrs+ C2DE average profile of all films on TV		55
7yrs+ C2DE in survey population	45	7yrs+ C2DE in total TV audience		55

Source: CAA Film Monitor
See notes to Table 3.

FILM PREFERENCES BY NATION

Tables 13-15 show the top 10 films with the highest average % of group in the total audience by nation for all films released in cinemas in 2017 – and captured in the Cinema Advertising Association Film Monitor – compared with the equivalent for all films transmitted on television. The Film Monitor survey does not include Northern Ireland.

British films feature in every top 10 cinema and television list for England, Scotland and Wales, with England showing the greatest preference for UK films at the cinema and Scotland showing the greatest preference for UK films on television. Four of the top 10 films at the cinema with above-average English audiences were UK films, two of which – *Dunkirk* and *Goodbye Christopher Robin* – were independent UK titles. Action was the most popular genre for in-cinema titles, while dramas and romantic comedies were the most popular genres on television. England was the only one of the three nations to feature a musical in its top 10 cinema list: the multi-Oscar® winning *La La Land*.

Traditionally, films with local themes or characters often attract sizeable above-average audiences in Scotland. In 2017, Scottish viewers made up a quarter of the total audience compared with their representation of 8% in the population, for *T2 Trainspotting*, set and filmed in and around Edinburgh. Two Scottish-set films also indexed highly amongst television audiences with the musical *Sunshine on Leith* and the original *Trainspotting* (both also set in and around Edinburgh) amongst the top three films with above-average audiences in Scotland. Overall, crime and horror titles were the most popular genres with Scottish audiences for films at the cinema, while preferences on television were more mixed. *Sunshine on Leith*, which features songs written by the Scottish group The Proclaimers was the only musical to feature in the three top 10 television lists. All four of the UK films in the television list are UK independent titles.

Drama was the most popular genre for cinema audiences in Wales which also showed a preference for action, fantasy, horror and comedy titles. Interestingly, there are two biopics in the cinema list: the Tupac Shakur life story *All Eyez on Me* and *Hacksaw Ridge*, the story of US conscientious objector and Medal of Honor recipient Desmond Doss, which starred British-American actor Andrew Garfield. Welsh preferences for films on television, which included the crime caper *Keeping up with the Joneses*, included a broad range of genres.

Table 13 Films with significant above-average audience profile amongst 7+ age group in England, 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
xXx: Return of Xander Cage	94	Parenthood	ITV	98
Atomic Blonde	92	Pretty Woman	BBC One	97
La La Land	92	Quo Vadis	BBC Two	96
Blade Runner 2049 (UK)	91	The Other Man (UK)	BBC One	96
Split	91	What Doesn't Kill You	BBC One	96
Dunkirk (UK)	91	One Fine Day	Film4	95
Goodbye Christopher Robin (UK)	91	Captain Corelli's Mandolin (UK)	ITV	95
Captain Underpants: The First Epic Movie	90	No Strings Attached	BBC One	94
My Little Pony: The Movie	90	War of the Worlds	Film4	94
Assassin's Creed (UK)	90	The Secret of My Success	BBC One	94
7yrs+ England average profile of all films	82	7yrs+ England average profile of all films on TV		83
7yrs+ England in survey population	85	7yrs+ England in total TV audience		83

Source: CAA Film Monitor

See notes to Table 3.

Table 14 Films with significant above-average audience profile amongst 7+ age group in Scotland, 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
T2 Trainspotting (UK)	25	Sunshine on Leith (UK)	Channel 4	22
Geostorm (UK)	15	The History Boys (UK)	BBC Two	21
Logan Lucky	14	Trainspotting (UK)	Channel 4	21
Smurfs: The Lost Village	13	North by Northwest	BBC Two	21
A Dog's Purpose	13	Zombieland (Channel 4)	Channel 4	20
Jigsaw	13	The Hatton Garden Job (UK)	Sky Cinema Premiere	20
It	13	Nanny for Christmas	Channel 5	20
The Snowman (UK)	13	Independence Day	Channel 5	20
Annabelle: Creation	12	Locked Away	Channel 5	19
Fifty Shades Darker	12	Confessions of a Shopaholic	BBC Two	19
7yrs+ Scotland average profile of all films	9	7yrs+ Scotland average profile of all films on TV		9
7yrs+ Scotland in survey population	8	7yrs+ Scotland in total TV audience		9

Source: CAA Film Monitor

See notes to Table 3.

Table 15 Films with significant above-average audience profile amongst 7+ age group in Wales, 2017 top films in cinema and on television

Films in the cinema	% of audience in age group	Films on TV	TV channel	% of audience in age group
Snatched	17	Keeping up with the Joneses	Sky Cinema Premiere	14
All Eyez on Me	16	The Trust	Sky Cinema Premiere	14
A Dog's Purpose	13	The Haunting	Film4	14
The Great Wall	13	Escape to Athena (UK)	BBC Two	13
Going in Style	13	The Rebound	BBC One	13
King Arthur: Legend of the Sword (UK)	13	The Riot Club (UK)	Film4	12
Lion (UK)	13	The Hound of the Baskervilles	Film4	11
Pitch Perfect 3	12	Just Go With It	Channel 5	11
My Cousin Rachel (UK)	12	Spies Like Us	Channel 5	11
Hacksaw Ridge	12	See Spot Run	ITV2	11
7yrs+ Wales average profile of all films	9	7yrs+ Wales average profile of all films on TV		5
7yrs+ Wales in survey population	7	7yrs+ Wales in total TV audience		5

Source: CAA Film Monitor

See notes to Table 3.

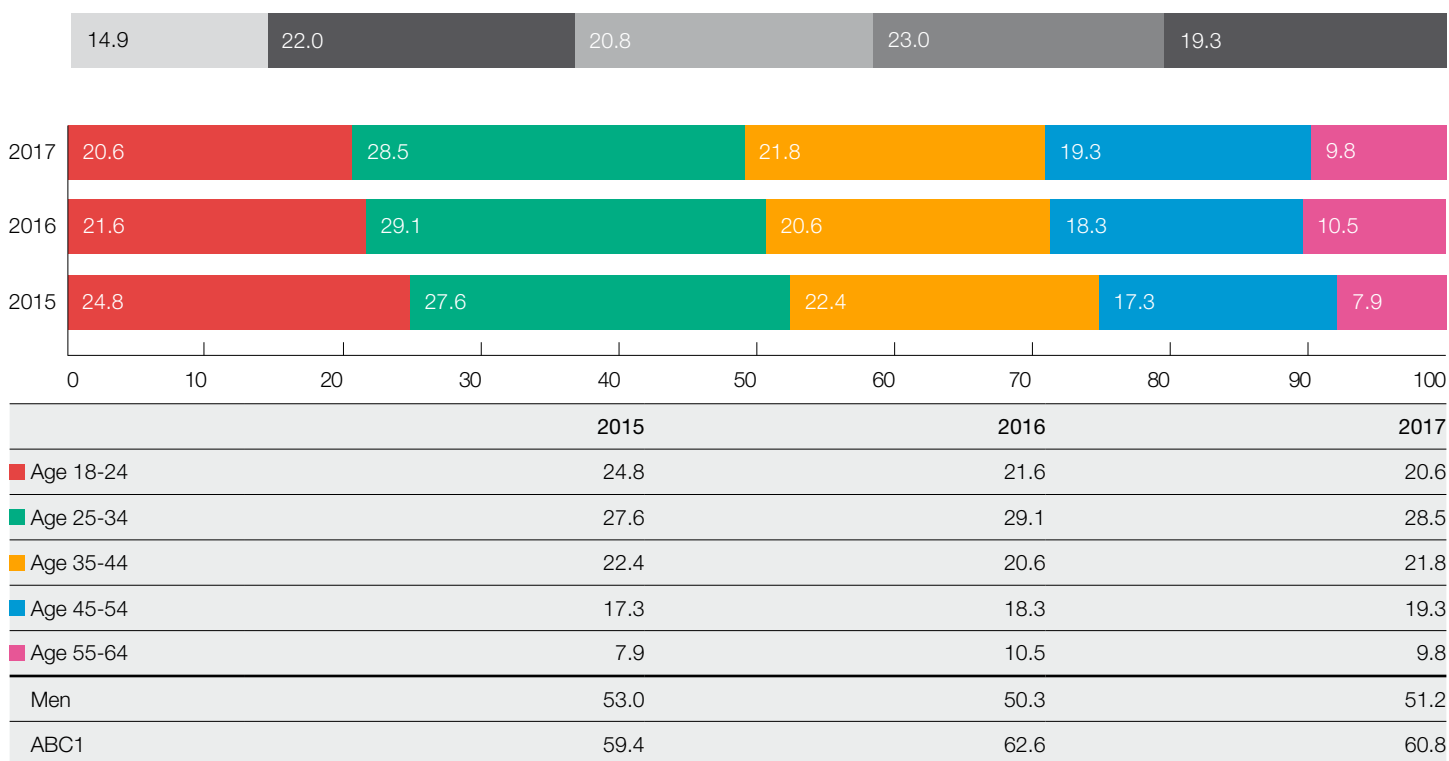
SUBSCRIPTION VIDEO ON DEMAND

There has been a rapid take-up of SVoD services in the UK in recent years, with over 11 million households now having access to one or more these services (see the Home Entertainment chapter). Early adopters of new technologies tend to be young and male, and this was certainly true in the initial days of SVoD availability in the UK. As Figure 6 demonstrates, whilst the age profile of SVoD users has gradually moved to be more representative of the UK population, subscribers remain predominantly young in comparison with the general population. In 2017, users aged 18-34 made up 49% of the SVoD audience compared with 37% for the UK as a whole.

In terms of gender and socio-economic status, the overall SVoD audience skews slightly more male and slightly more affluent than the general population. Interestingly, the socio-economic profile indicates that as adoption has increased, the audience has become slightly more upmarket. This might be due to the appeal of exclusive original British series such as *The Crown* on Netflix and *The Grand Tour* on Amazon Prime, as well as a recent broadening of the content offer to include more original documentaries and arts programming which typically appeal to an older and more affluent demographic.

Figure 6 UK SVoD audience profile by age, 2015-2017

UK population 2017



Source: Ampere Analysis, Consumer Surveys 2015-2017, UK adults 18-64. Base: 2015 (330), 2016 (788), 2017 (2,244)

Note: UK population weighted to represent 18-64 year olds.

AUDIENCE PROFILE FOR SELECTED SVoD SERVICES

Whilst there is a growing number of subscription on-demand and streaming services available to UK audiences, the market is dominated by three main providers. Netflix remains the largest and by Quarter 4, 2017 was available in 8.2 million UK homes, with Amazon Prime Video the second largest (4.3 million homes). Now TV, Sky’s wholly owned platform, is the smallest of the three with around 1.5 million subscriber homes (Q4, 2017). The profile of users is fairly similar for all three services, with only small differences between them. Compared to the UK population, audiences for all three services skew young. Netflix has the youngest profile with 54.8% of its audience aged under 35. Now TV has slightly broader appeal by age and is also the most female. All three skew slightly to the more affluent socio-economic grades.

Figure 7 Audience profile of selected SVoD services in the UK by age, 2017

% of group in audience



Source: Ampere Analysis, Consumer Survey 2017, UK adults. Base: (2,244)

Note: This is the profile of all users, not those that watch film.

AUDIENCE PROFILE COMPARATIVE ANALYSIS

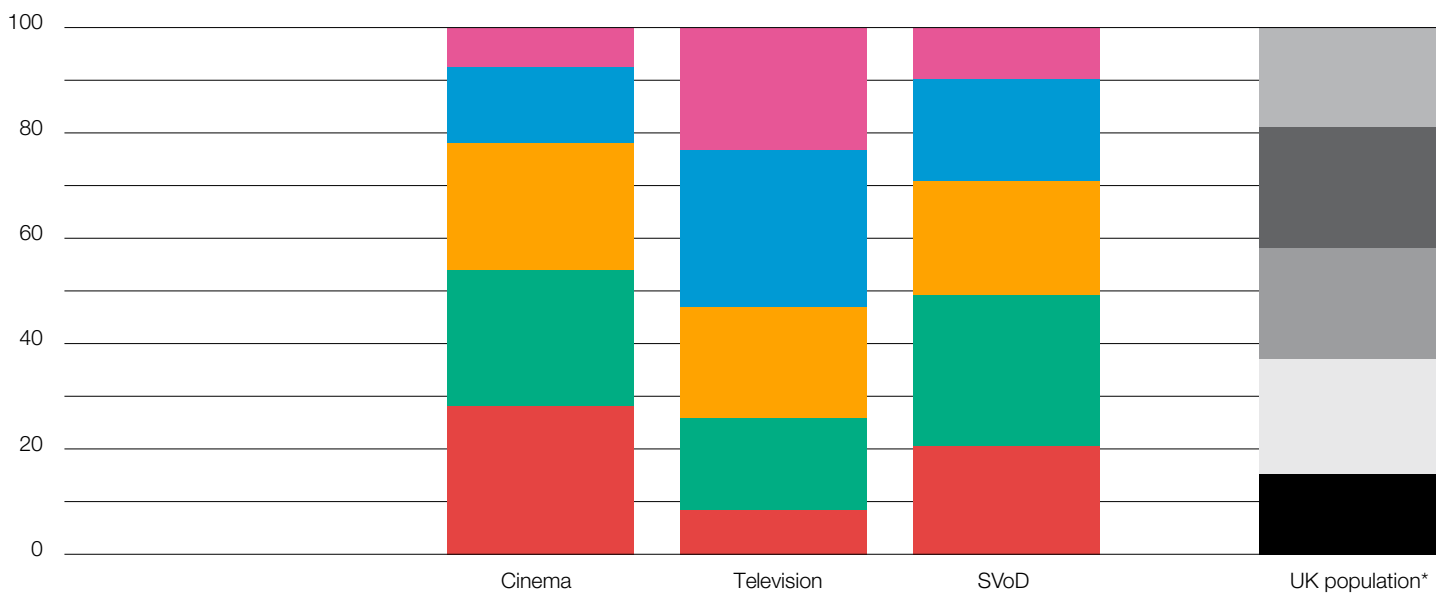
This chapter has focused on comparing the demographic profile of the audience for the three most popular platforms that show film as well as the demographic preferences of audiences for films on two of these: cinema and television. However, due to the different methodologies used to collect the data and to the different base definitions of respondents, it is difficult to draw real comparisons between them. The following chart attempts to remove those differences by looking at a common core sample of 18–64 year olds. It should be noted that this is not single source data so we are unable to create overlaps in, for example, those who use all three platforms for watching film. In addition, the data for the SVoD services is for all content watched on these platforms, including high-end television series, so is not exclusively based on a ‘film only’ audience.

Cinema delivers the youngest skewing audience profile, with 54% aged between 18 and 34 and only 7.4% aged 55–64. The age profile for television is almost a mirror image of this, with 54% of the audience aged 45–64 and only 8.4% aged 18–24. This underlines the difference between the ‘going out’ experience of cinema and the ‘staying in’ nature of television. Whilst we know from other data sources that both platforms have the ability to deliver significant audience numbers for watching film, the preference of cinema or television relates not just to the choice of film, but to the viewing experience it delivers. The SVoD audience also skews young and suggests that viewing film on SVoD platforms is complementary to seeing films in the cinema and thus more likely to compete with watching films on television than with cinema-going.

In terms of gender, all three platforms attract an audience that is not significantly different from the UK population and which splits equally between men and women. In socio-economic terms, the comparative position is similar to age, with cinema and SVoD showing a similarly slightly upmarket profile compared to that of television which under-represents ABC1 viewers.

Figure 8 Comparative UK audience profiles, cinema, television and SVoD, 2017

% of group in audience



	Cinema	Television	SVoD	UK population*
Age 18-24	28.2	8.4	20.6	15.2
Age 25-34	25.8	17.5	28.5	21.9
Age 35-44	24.0	21.1	21.8	21.0
Age 45-54	14.6	29.7	19.3	23.0
Age 55-64	7.4	24.3	9.8	19.1
Men	51.2	51.0	51.2	50.5
ABC1	60.9	44.0	60.8	54.0

Source: CAA, BARB/Techedge, Ampere Analysis, BFI analysis

Notes: CAA data based on all films released in 2017 and which achieve a base size of more than 100 respondents in the CAA's annual Film Monitor research. Titles (81), Base (13,713).

BARB/Techedge data filtered on all titles transmitted on all BARB subscribed channels in 2017, where a single title is transmitted on more than one channel it is counted once. Titles (7,323), UK adults (18-64), Base (6,668).

Ampere Analysis Consumer Survey 2017, Audience profile for all UK SVoD services, Base (2,244).

* Based on adults aged 18-64.



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