

BFI



AUDIENCES

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FACTS IN FOCUS

In 2019, nine in every ten adults in the UK watched a film on any platform. Although the audience for SVoD continues to grow, adults were more likely to have watched a film on a broadcast TV channel than any other way.

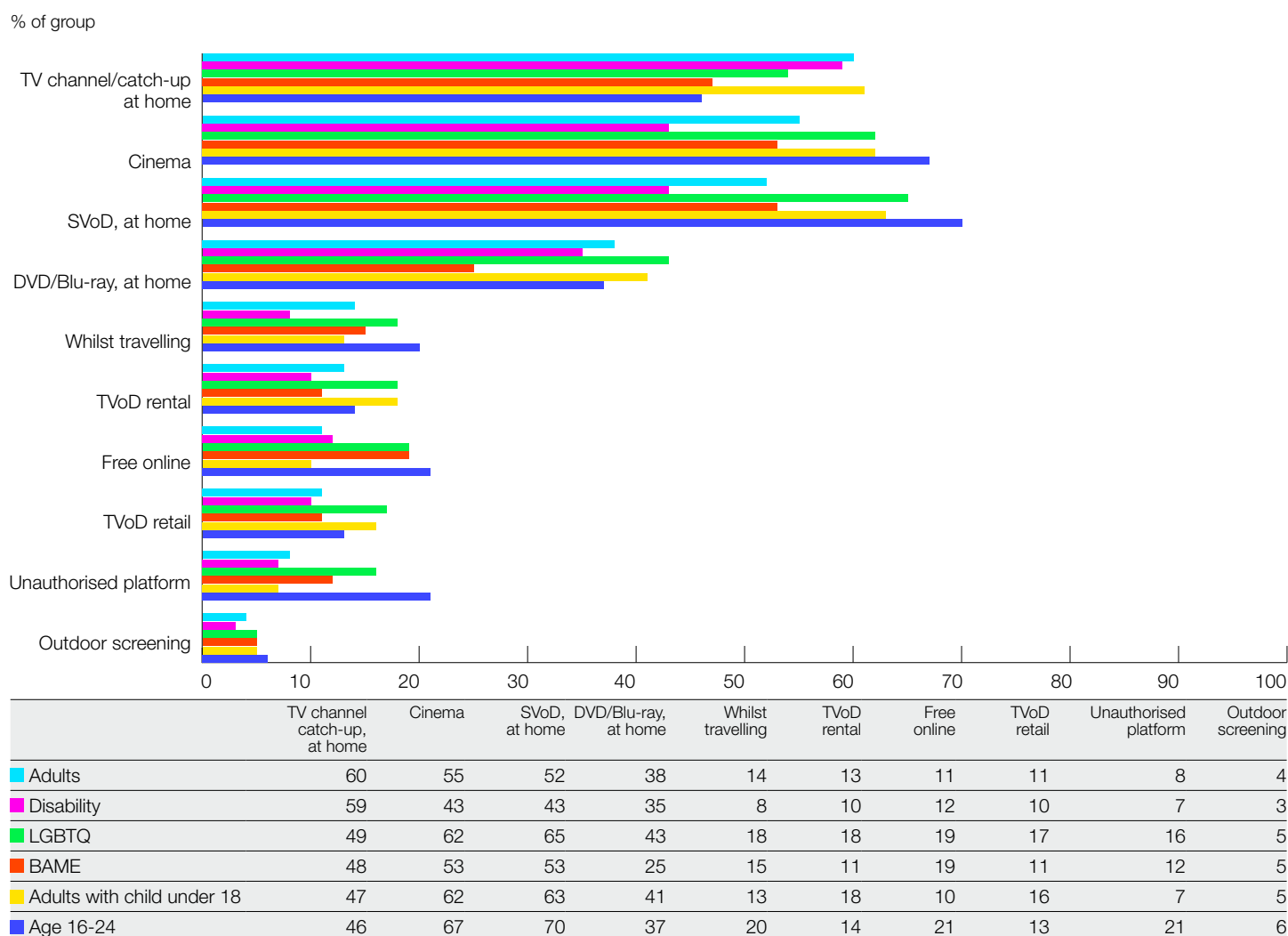
- 90% of UK adults have watched a film in the last 12 months
- Amongst these film viewers 55% watched a film at the cinema
- 41% of all cinema-going occasions in 2019 were by young people aged 15-24
- The youngest skewing title at the cinema was *Blue Story* with 74% of its audience aged 15-24
- The oldest skewing title at the cinema was *Fisherman's Friends* with 68% of its audience aged 55+
- The audience for *Downton Abbey*, the highest performing UK independent film of 2019, was 70% female and 78% ABC1
- Adults aged 55+ make up half of the viewing audience for film on TV
- 44% of the total SVoD audience are aged 18-34

AUDIENCES

AUDIENCES FOR FILM IN THE UK BY PLATFORM

When asked whether they had viewed a film at any location or by any method / platform in the previous 12 months, 90% of the UK adult population (aged 16+) responded positively. The 12 month reach for BAME audiences and adults with a disability was 87%, and 93% for adults with a child under 18. At the specific film viewing location or platform level, the highest reach amongst all adults was for film on broadcast TV channels (60%) (Figure 1). In contrast, for adults aged 16-24, adults with a child under 18, BAME and LGBTQ audiences, the most popular platform used to watch films was subscription video-on-demand services (SVoD). Adults with a disability were less likely to have viewed a film on SVoD (43%) than adults as a whole (52%), and broadcast TV channels achieved the highest reach amongst this group (59%).

Figure 1 Audiences for film in the UK, top 10 methods of viewing



Source: BFI/YouGov Nations & Regions Survey, Oct/Nov 2019, Base: n=12,029 UK adults, 16yrs+

Q. In which of the following venues or ways have you watched a film in the past 12 months? Please select all that apply

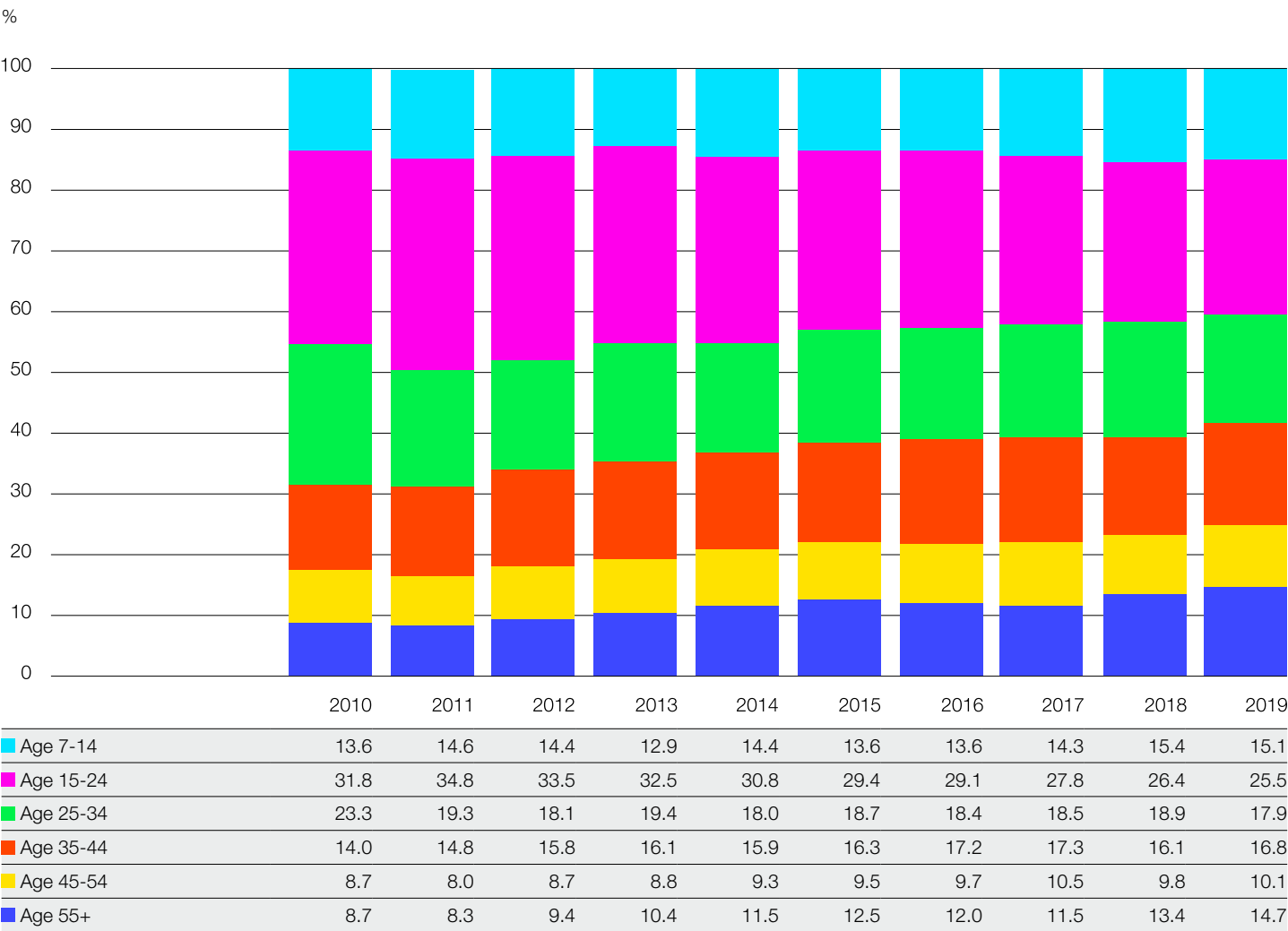
CINEMA AUDIENCE BY AGE

Figure 3 shows the trends by age for cinema admissions between 2010 and 2019. Admissions here are based on weighted averages of the audience profiles for all releases reported by the Cinema Advertising Association (CAA) Film Monitor (in 2019 this covered 84 new theatrical releases).

The relative proportion of admissions for each category has been broadly similar throughout the period, with the exception of audiences aged between 15-24 and those aged 55+. There has been a small, but steady, downward trend in the share of admissions accounted for by 15-24 year olds, which decreased from a high of 35% in 2011 to a low of 26% in 2019, and an increase in the admissions share of cinema-goers aged 55 or over, which rose from a low of 9% in 2010 to a high of 14% in 2019.

Regardless of this change in profile, which represents slightly fewer admissions than in the previous year, the 15-24 year old age group is still the largest demographic in the cinema audience for films released into cinemas in 2019.

Figure 2 Age distribution of cinema audience, 2010-2019



Source: Cinema Audience Agency (CAA) Film Monitor, 2010-2019

Notes:

‘Cinema audience’ in this chart and throughout this chapter refers to gross film-going occasions. That means, 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 reports the audience profile of 84 film titles (mostly mainstream) of the theatrical releases in 2019. The Film Monitor survey is carried o every fortnightly with an omnibus survey panel of over 1,000 adults and children aged 7+ who had been to the cinema in the previous three months. The survey does not cover Northern Ireland.

Annual cinema going age profiles are based on audiences to films released in that year and reported by the CAA Film Monitor for that year,

CINEMA AUDIENCE BY GENDER AND SOCIO-ECONOMIC STATUS

According to CAA Film Monitor data, whilst the proportion of males to females for all cinema going audiences is equal, Table 1 shows that there are differences by age group. For younger cinema going audiences, the profile skews male (52%) but for audiences aged 35+ or over, women (56%) outweighed men.

The average cinema audience consistently attracts a higher proportion of individuals from the ABC1 socio-economic grades in all age groups compared with the general population. This is most marked amongst the 35+ year old audience, 69% of which was comprised of ABC1 cinema-goers in 2019.

Table 1 Cinema audiences by age and gender/social grade, 2019

Cinema audiences						UK population
	Age 7-14	Age 15-24	Age 25-44	Age 35+	All 7+	7+
	%	%	%	%	%	%
Males	52	53	52	44	50	49
Females	48	47	48	56	50	51
ABC1	59	59	63	69	63	54
C2DE	41	41	37	31	37	46

Source: CAA Film Monitor, 2019

See notes for Figure 2

CINEMA AUDIENCE FOR UK FILMS

This section looks at the audience profile for UK films as a subset of all film. Of the 84 new releases covered by the CAA Film Monitor in 2019, 35 were UK qualifying productions, of which 20 were UK independent titles (compared with 33 and 15 in 2018).

As Table 2 shows, the audience profile for UK films is slightly different to that for all film. UK films attracted a smaller proportion of cinema goers in the 15-44 year old age range (55%) compared to 60% for all film. UK films skewed slightly more female (52%) than all film (50%), and also had a slightly more upmarket audience profile (65% ABC1) than that for all film (63%)

Table 2 Audience profile of UK films compared with all film, 2019

	UK film	All film (including UK film)
	%	%
Age 7-14	15.2	15.2
Age 15-24	24.1	25.8
Age 25-34	16.1	17.8
Age 35-44	15.0	16.8
Age 45-54	10.8	10.0
Age 55+	18.7	14.4
Male	47.9	49.7
Female	52.1	50.3
ABC1	65.3	63.2
C2DE	34.7	36.8
England	84.1	84.1
Scotland	8.0	7.7
Wales	7.9	8.2

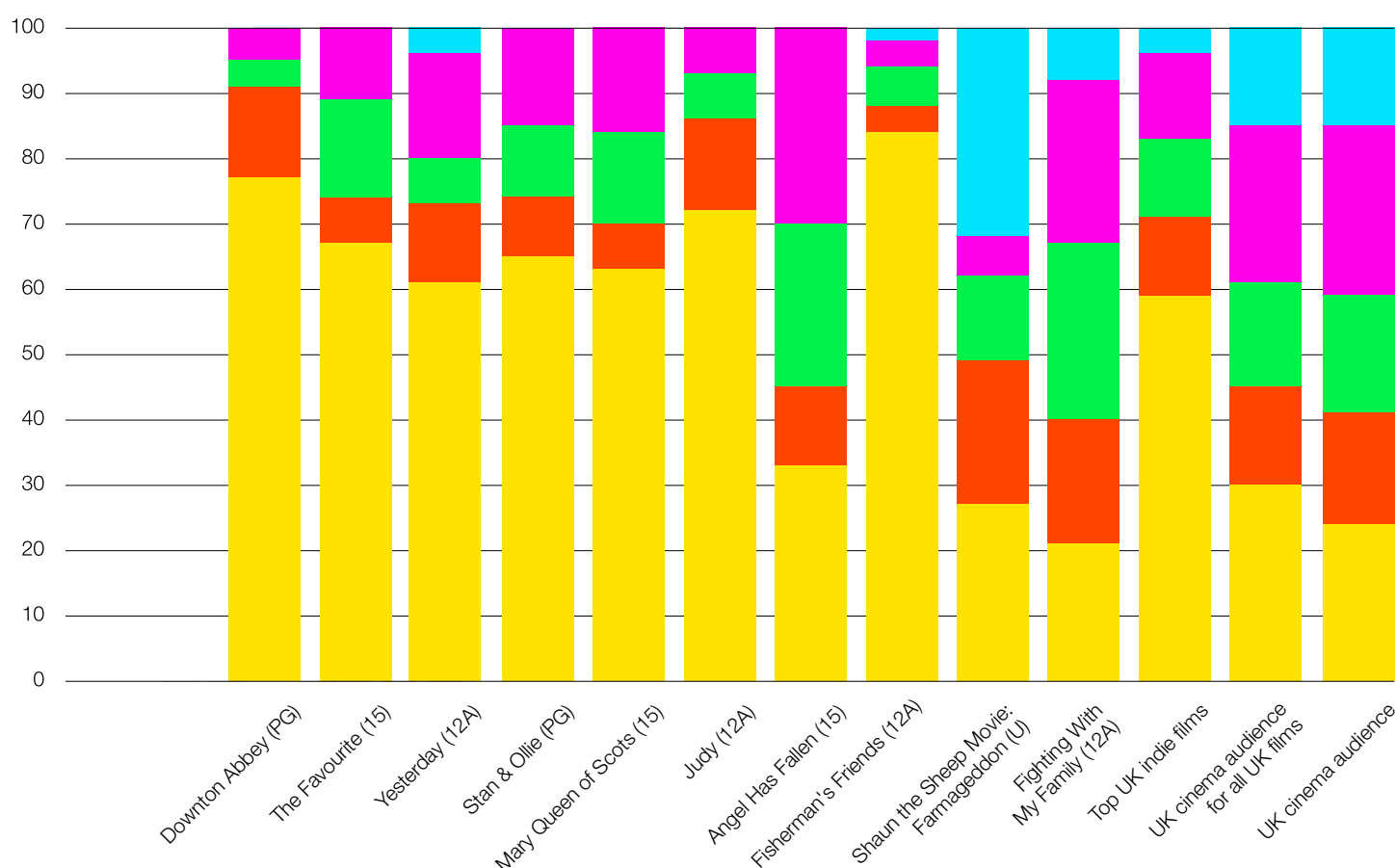
Source: CAA Film Monitor, 2019

See notes for Figure 2

The top 10 UK independent films released in 2019 show a skew towards older audiences, with 59% of the overall audience for the top 10 films being in the 45+ year old age group (Figure 3). For seven of the top 10 UK independent films over half the audience was aged over 45yrs; these features were mostly a mix of period films and romantic comedies, with over 80% of the cinema audience for *Fisherman's Friends* being in this older age group. This contrasts with audiences for UK films overall, where just 30% are 45 years or older. The films with younger profiles amongst the top 10 UK independent films are action film *Angel Has Fallen* (67% being in the under 45 year old age group), children's film *Shaun the Sheep Movie: Farmageddon* (73%), and wrestling comedy-drama *Fighting with My Family* (79%).

Figure 3 Cinema audience profile by age for the top 10 UK independent film titles, 2019, ranked by box office performance

% of group in audience



Age 7-14	0	0	4	0	0	0	0	3	32	9	4	15	15
Age 15-24	5	11	16	14	16	8	30	4	6	25	13	24	26
Age 25-34	4	15	7	11	14	7	25	6	13	27	12	16	18
Age 35-44	14	7	12	9	7	14	12	4	22	19	12	15	17
Age 45+	77	67	61	65	63	72	33	84	27	21	59	30	24

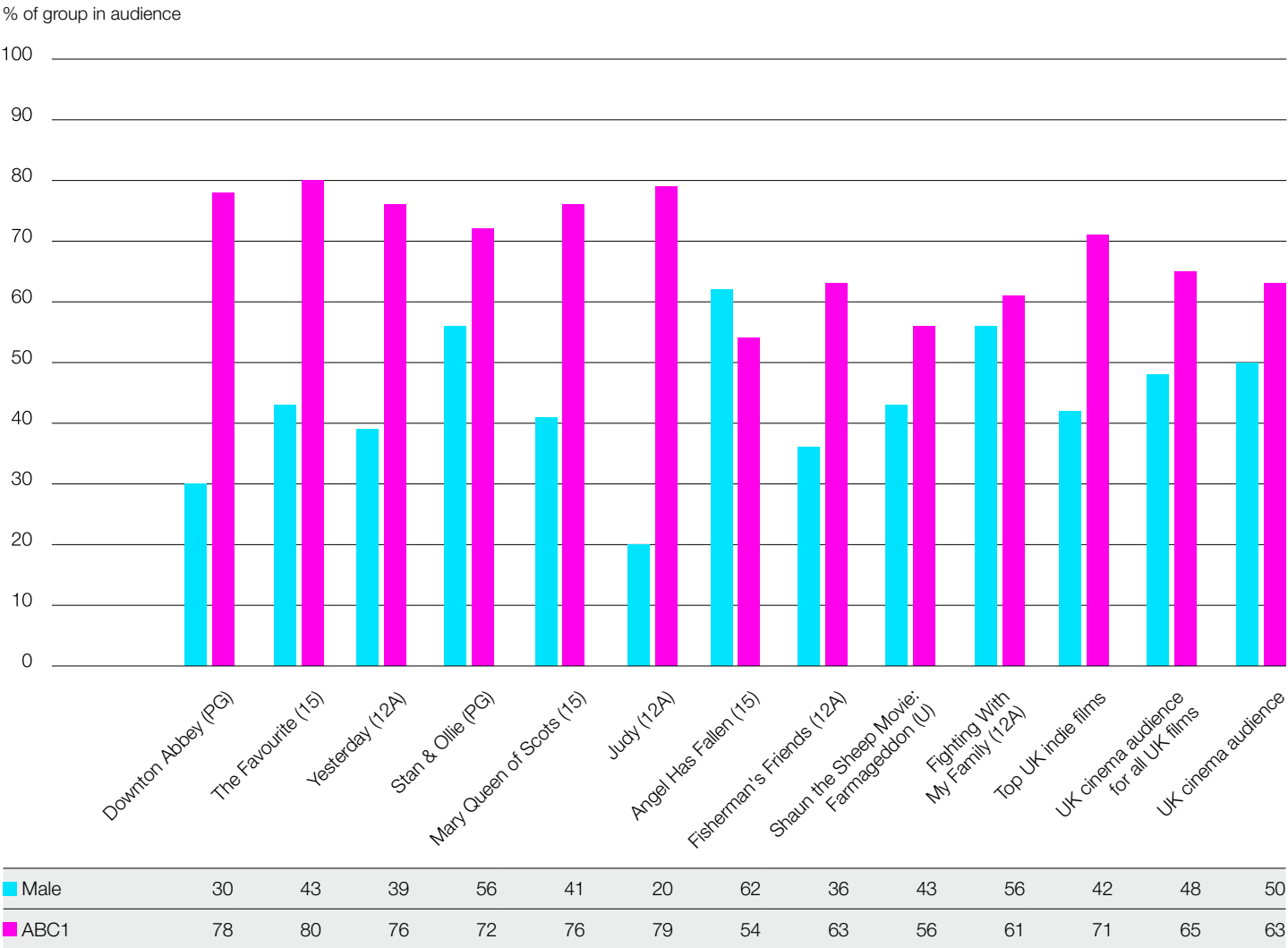
Source: CAA Film Monitor, 2019

See notes for Figure 2

In contrast to 2018 when the top 10 UK independent films attracted a relatively equal gender split (% males: % females), in 2019 58% of the total audience for the top 10 films were female (Figure 4). Seven of the UK independent features had a majority female audience, with profiles that ranged from 57% female for *The Favourite* to 80% for *Judy*. The other three features in the top 10 list attracted a higher proportion of men in the audience: *Angel Has Fallen* (62% male), *Fighting With My Family* and *Stan & Ollie* (both 56%),

As well as attracting a higher proportion of older viewers than cinema films in general, the top 10 UK independent titles in 2019 also achieved a higher share of admissions amongst those in the ABC1 socio-economic group. Overall the profile of the top 10 UK independent films in 2019 was 71% ABC1 and 29% C2DE and unchanged from 2018. This compares to an ABC1 profile of 63% for the overall UK cinema audience, and 61% for the 35 UK qualifying films covered by the CAA Film Monitor. UK independent titles which indexed below the average ABC1 profile and appealed more to audiences in the lower socio-economic categories included *Fighting With My Family* (61%), *Shaun the Sheep: Farmageddon* (56%) and *Angel Has Fallen* (54%).

Figure 4 Cinema audience profile by gender and socio-economic status for the top 10 UK independent film titles, 2019, ranked by box office performance



Source: CAA Film Monitor, 2019

See notes for Figure 2

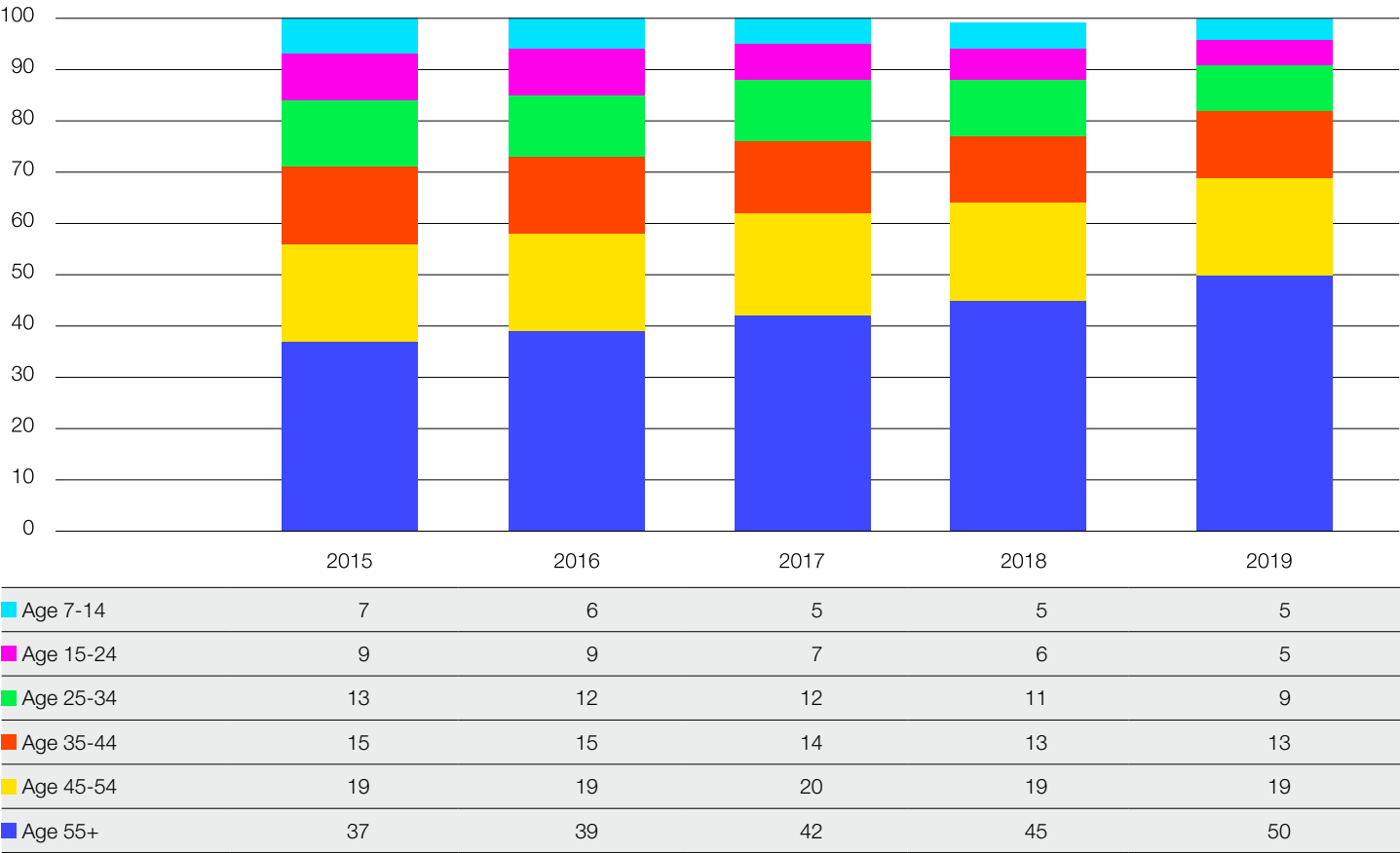
AUDIENCES FOR FILM ON TELEVISION

The age distribution of audiences for films watched on television continues to differ markedly from that for films shown at the cinema. Overall, individuals who watch films on television tend to be in the older age groups, and for the first time, half of the average television audience for film in 2019 was aged 55 or over. As with cinema-goers, there is evidence that the television audience is growing older through time, both for film and across all broadcast television, and at a faster rate than this group’s representation within the UK population as a whole. As Figure 5 shows, the proportion of older (45+) viewers increased by 13 percentage points between 2015 and 2019 (from 56% to 69%), whilst the percentage of 15-24 year olds almost halved during the same period (9.3% to 4.9%).

These changes in the data for television audiences for film are due to overall changes in the way in which film and television content is now consumed in British homes, and much of the change in profile is due to methodology factors in the measurement of television audiences, which has experienced challenges keeping up with the multiple access and behavioural developments occurring over the past few years. These data, by and large, reflect the audience to live and recorded broadcast channels rather than the totality of viewing on the TV set including on demand and streaming services viewed on internet connected TV’s. This will be explored further later in the chapter.

Figure 5 Age distribution of television audiences for film, all channels, 2015-2019

% of group in audience



Source: BARB/TechEdge, All individuals 7yrs+, Total TV, filtered on ‘film’ genre

Notes:

Television audience analyses are sourced from BARB data and cover all programmes classified by BARB’s genre attribution as ‘films’. Figures have been updated for previous years due to a change in genre metadata classification.

FILM PREFERENCE BY AGE

Tables 3-8 show the top 10 films with the strongest profiles for six separate age groups (as a % of all individuals aged 7+), for all films captured in the CAA Film Monitor and released in 2019. This is compared with the equivalent profile ranking for all films transmitted on any broadcast television channel. These tables therefore do not represent the films seen by the largest number of viewers within each age group (% of group in audience) but rather the films whose audience, regardless of size, delivered the highest proportion of its audience from, or had the strongest affinity for, each age group (% of audience in group).

A majority of the top 10 ranking films for the 7-14 year old age group, are those that have been explicitly produced for that age group, with the children's series *Horrible Histories*' big screen outing being the film with the largest proportion of these younger viewers within its audience (Table 3). Both this film and *Arthur Christmas*, which had the strongest 7-14 profile amongst films on broadcast TV, are UK films.

The audience profile for UK crime drama *Blue Story* was primarily driven by the 15-24 year old age group (74%, Table 4), mirroring the age range of the main characters in the film. The other films at the cinema attracting the strongest profiles amongst this age group were either action or horror films, with the exception of *Good Boys* – a coming-of-age comedy. The genre of films on TV attracting the largest percentage of this age group were more varied, and included music/dance dramas *Pitch Perfect*, *Step Up 3*, and *Step Up 2: The Streets*.

For the 25-34 year old age group it was a TV transmission of the 1997 UK comedy *Bean*, with a 40% 25-34 profile, that had the strongest affinity for this group amongst the top 10 broadcast and cinema films (Table 5). The majority of top 10 films on TV with high proportions of this group in the audience were also millennium-era feature releases. Amongst films at the cinema, *Long Shot*, the Charlize Theron / Seth Rogen rom-com, was the title with the strongest % profile for this age group (31%).

The top 10 highest affinity films for the 35-44 year old age group are split between family-orientated and adult-orientated titles. The diversified list ranges from the 18 certificate *Rambo: Last Blood* and the gross out comedy *There's Something About Mary* to the animated features *Abominable* and *The Lego Movie 2* (Table 6). This breadth of genres suggests that this age group's viewing habits is strongly influenced by the presence or not of younger members of their family.

As previously described the age profile of UK independent films generally skews to older age groups (Figure 3), and this is reflected in the top films at the cinema with the strongest profiles for the 45-54 year old and 55yrs+ age groups. Seven of the top 10 ranking films for 45-54 year olds (Table 7) and eight amongst the 55+ age group were UK independent films, with *Fisherman's Friends*, *The Good Liar*, *The Favourite* and *Stan & Ollie* featuring on both lists.

Films with the strongest 55+ age profile tend to include a higher number of older films than the top ranking films for younger age groups. Where the oldest film in the 45-54 age group is *Carry on Camping* (1969), the oldest film in the 55+ age group is *In Which We Serve* (1942).

Table 3 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of the 7-14 age group

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Horrible Histories The Movie – Rotten Romans (PG)*	43	Arthur Christmas (BBC 1)*	28
Spies In Disguise (PG)	41	Hotel Transylvania 2 (BBC 1)	27
The Kid Who Would Be King (PG)*	39	Antz (BBC 1)	27
The Lego Movie 2 (U)	37	Despicable Me 2 (BBC 1)	27
The Secret Life of Pets 2 (U)	36	Captain Underpants (BBC 1)	26
Angry Birds 2 (U)	36	Captain America: Civil War (BBC 1)	26
Abominable (U)	35	Scooby Doo 2: Monsters Unleashed (CH4)	26
Wonder Park (PG)	35	Home Alone (ITV)	24
The Addams Family (PG)	34	Jack Frost (ITV)	23
Dora and the Lost City of Gold (PG)*	33	Hotel Transylvania (BBC 1)	23
7-14 yrs average profile of all films	15	7-14yrs average profile of all films on TV	5
7-14 yrs in survey population	10	7-14yrs in total TV audience	4

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2

Television audiences are originated from BARB data and cover all films classified by BARB as 'films' and which achieved an average individual transmission audience of over 250,000 individuals aged 7+. Where a film has been screened more than once during the year the showing with the highest % profile for that group is included.

UK films are marked with an asterisk

Table 4 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of the 15-24 age group

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Blue Story (15)*	74	Pitch Perfect (ITV2)	29
Scary Stories To Tell In the Dark (15)	64	The Polar Express (BBC 2)	28
Us (15)	63	The World's End (ITV2)*	26
It: Chapter Two (15)	58	Bad Neighbours (5STAR)	26
Annabelle Comes Home (15)	52	Step Up 3 (ITV2)	25
Zombieland: Double Tap (15)	49	Now You See Me (ITV2)	25
Good Boys (15)	44	Kung Fu Panda 2 (ITV)	25
Joker (15)	42	Yes Man (5USA)	23
Pet Sematary (15)	41	Step Up 2: The Streets (ITV2)	23
John Wick: Chapter 3 - Parabellum (15)	41	The Hunger Games: Catching Fire (BBC 2)	23
15-24 yrs average profile of all films	26	15-24 yrs average profile of all films on TV	5
15-24 yrs in survey population	14	15-24 yrs in total TV audience	4

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

Table 5 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of the 25-34 age group

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Long Shot (15)	31	Bean (Channel 5)*	41
Stephen King's Doctor Sleep (15)	29	The Hangover (BBC 2)	40
Ad Astra (12A)	29	How The Grinch Stole Christmas (Channel 5)	38
Cold Pursuit (15)*	29	Titanic (ITV2)	37
Glass (15)	28	American Pie 2 (ITV)	36
Terminator: Dark Fate (15)	28	Fast & Furious 7 (5STAR)	36
Pet Sematary (15)	27	Dodgeball: A True Underdog Story (Film4)	33
Hustlers (15)	27	Identity Thief (ITV2)	32
Fighting With My Family (12A)*	27	The 40 Year Old Virgin (BBC 1)	32
X-Men: Dark Phoenix (12A)	26	Step Up 2: The Streets (ITV2)	32
25-34 yrs average profile of all films	18	25-34 yrs average profile of all films on TV	9
25-34 yrs in survey population	14	25-34 yrs in total TV audience	8

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

Table 6 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of the 35-44 age group

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Abominable (U)	38	Labyrinth (CH4)*	44.9
Cold Pursuit (15)*	35	Honey I Shrunk The Kids (BBC 2)	39.2
Rambo: Last Blood (18)	27	The Hangover Part II (Channel 5)	39.0
Frozen 2 (U)	26	Beetlejuice (BBC 1)	37.0
Wonder Park (PG)	26	Terminator II: Judgement Day (CH4)	36.4
Missing Link (PG)	26	There's Something About Mary (ITV2)	36.4
Horrible Histories The Movie – Rotten Romans (PG)*	25	Ride Along (ITV)	35.6
How To Train Your Dragon: The Hidden World (PG)	25	Godzilla (ITV2)	35.4
The Lego Movie 2 (U)	24	The Boss (Film4)	35.1
UglyDolls (U)	24	National Treasure (ITV2)	35.1
35-44 yrs average profile of all films	17	35-44 yrs average profile of all films on TV	13
35-44 yrs in survey population	15	35-44 yrs in total TV audience	10

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

Table 7 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of the 45-54 age group

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Midsommar (18)	21	Jaws (ITV)	46
Stan & Ollie (PG)*	19	Die Hard 2: Die Harder (Film4)	41
Knives Out (12A)	19	Snow White And The Huntsman (CH4)*	39
The Good Liar (15)*	18	The Wolverine (ITV)	38
Yesterday (12A)*	18	The Last Holiday (Film4)	37
Fisherman's Friends (12A)*	16	Carry On Camping (ITV)*	37
Blinded By The Light (12A)*	16	Evan Almighty (Channel 5)	37
Angel Has Fallen (15)*	16	Bridge Of Spies (ITV)	37
Rambo: Last Blood (18)	16	Happy Feet Two (BBC 1)	37
The Favourite (15)*	15	The Rock (Channel 5)	36
45-54 yrs average profile of all films	10	45-54 yrs average profile of all films on TV	19
45-54 yrs in survey population	12	45-54 yrs in total TV audience	17

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

Table 8 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of the 55+ age group

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Fisherman's Friends (12A)*	68	Lawman (Channel 5)	97
Can You Ever Forgive Me (15)	65	El Dorado (ITV)	94
Downton Abbey (PG)*	64	Hondo (ITV2)	94
Wild Rose (15)*	64	The Cruel Sea (Film4)*	93
Judy (12A)*	58	Nevada Smith (BBC 1)	91
The Good Liar (15)*	56	633 Squadron (Sky 1)*	91
The Favourite (15)*	52	Guns Of The Magnificent Seven (ITV4)	91
Mary Queen of Scots (15)*	50	Half A Sixpence (Film4)*	90
Little Women (U)	50	In Which We Serve (ITV4)*	89
Stan & Ollie (PG)*	46	Fire Down Below (Film4)	89
55 yrs+ average profile of all films	14	55 yrs+ average profile of all films on TV	50
55 yrs+ in survey population	35	55 yrs+ in total TV audience	57

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

FILM PREFERENCES BY GENDER

Tables 9 and 10 show the top 10 films with the highest audience profile by gender for films in the cinema and on TV during 2019. There is a close-to-even split between males and females in the overall cinema audience, but whilst females make up 55% of the overall TV audience, they only account for 50% of the audience for films on TV.

The films with the largest proportion of females in their audience, both at the cinema and on TV, typically have some mix of female-led narratives, strong romantic or dramatic elements and often highly identifiable female protagonists. At the cinema six of the top 10 skewing female films were UK films.

By contrast, the top 10 male skewing films includes only three UK titles. Films with majority male audiences were generally action-orientated genre films with male-led narratives. Westerns dominated the list of the most male skewing films broadcast on TV.

Table 9 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of female viewers (age 7yrs+)

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Judy (12A)*	80	Love Again (ITV2)	87
Wild Rose (15)*	77	Woman On The Edge (ITV2)	83
What Men Want (15)	76	Step Up 3 (ITV2)	81
Cats (U)*	74	The Fault In Our Stars (Channel 5)	80
Last Christmas (12A)*	74	Family Secrets (Film4)	80
Little Women (U)	73	Never Been Kissed (Film4)	80
Frozen 2 (U)	72	27 Dresses (ITV4)	79
Hustlers (15)	70	Locked Away (ITV)	79
Downton Abbey (PG)*	70	My Big Fat Greek Wedding 2 (ITV2)	79
Aladdin (PG)*	69	Magic Mike XXL (ITV2)	79
Females (7yrs+) average profile of all films	50	Females (7yrs+) average profile of all films on TV	50
Females (7yrs+) in survey population	51	Females (7yrs+) in total TV audience	55

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

Table 10 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of male viewers (age 7yrs+)

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
John Wick: Chapter 3 - Parabellum (15)	74	Lawman (Channel 5)	84
Le Mans '66 (12A)	74	Get Carter (BBC 2)*	78
Hellboy (15)*	72	The Mechanic (Film4)	77
Cold Pursuit (15)*	71	The Outlaw Josey Wales (ITV2)	76
Zombieland: Double Tap (15)	70	El Dorado (ITV)	76
Rambo: Last Blood (18)	69	Behind Enemy Lines (5Spike)	75
Star Wars: The Rise of Skywalker (12A)*	68	Unforgiven (ITV4)	75
Terminator: Dark Fate (15)	67	Guns Of The Magnificent Seven (ITV4)	74
Alita: Battle Angel (12A)	67	For A Few Dollars More (Film4)	73
Midsommar (18)	66	Enter The Dragon (E4)	73
Males (7yrs+) average profile of all films	50	Males (7yrs+) average profile of all films on TV	50
Males (7yrs+) in survey population	49	Males (7yrs+) in total TV audience	45

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

FILM PREFERENCES BY SOCIO-ECONOMIC GROUP

Tables 11 and 12 show the top 10 films with the highest audience profile by the two primary socio-economic groups for films in the cinema and on TV during 2019. There is a marked difference in the socio-economic profile of cinema audiences compared to audiences for films on broadcast TV; at the cinema audiences are 63% ABC1, whilst the viewing audience for films broadcast on television is just 43% ABC1.

Films with the strongest C2DE profile tend to be from action-orientated genres like horror (*Annabelle Comes Home*), action (*Bad Boys for Life*), thriller (*Cold Pursuit*) and westerns (*The Outlaw Josey Wales*). Films with a majority ABC1 audience, whilst still having some examples of male-led action genre films like *Drive Angry*, have more of a focus on dramas (e.g. *Knives Out*, *The Favourite* and *Love And Friendship*).

Table 11 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of ABC1 viewers (age 7yrs+)

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Knives Out (12A)	82	Love And Friendship (BBC 2)	76
Once Upon A Time In... Hollywood (18)	82	La La Land (Film4)	74
Blinded By The Light (12A)*	81	Borg Vs McEnroe (Channel 5)	73
Vice (15)	80	Johnny English Reborn (ITV3)*	71
The Favourite (15)*	80	Sliding Doors (ITV)	71
Judy (12A)*	79	Despicable Me 2 (CH4)	70
The Good Liar (15)*	78	Dodgeball: A True Underdog Story (ITV)	69
Downton Abbey (PG)*	78	2001: A Space Odyssey (Film4)	69
Can You Ever Forgive Me (15)	77	Drive Angry (BBC 2)	69
Ad Astra (12A)	77	A United Kingdom (ITV2)*	68
ABC1 (7yrs+) average profile of all films	63	ABC1 (7yrs+) average profile of all films on TV	43
ABC1 (7yrs+) in survey population	54	ABC1 (7yrs+) in total TV audience	46

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

Table 12 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of C2DE viewers (age 7yrs+)

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Annabelle Comes Home (15)	60	Police Academy 4: Citizens On Patrol (Film4)	88
Bad Boys For Life (15)	58	The Outlaw Josey Wales (ITV2)	85
UglyDolls (U)	57	The Searchers (Film4)	83
Blue Story (15)*	52	Bend Of The River (Film4)	83
Wonder Park (PG)	51	Hummingbird (5STAR)	82
Long Shot (15)	51	Enter The Dragon (E4)	82
Rambo: Last Blood (18)	50	Cahill, U.S. Marshal (Film4)	81
Terminator: Dark Fate (15)	50	Robin Hood Prince Of Thieves (CH4)*	81
Cold Pursuit (15)*	49	Dead Man's Shoes (Film4)*	81
Fast & Furious: Hobbs & Shaw (12A)*	49	El Dorado (ITV)	81
C2DE (7yrs+) average profile of all films	37	C2DE (7yrs+) average profile of all films on TV	57
C2DE (7yrs+) in survey population	46	C2DE (7yrs+) in total TV audience	54

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

FILM PREFERENCES BY NATION

Tables 13 through 15 show the top 10 films with the highest % profile by three nations for films in the cinema and on TV during 2019. Note that Northern Ireland is not included as the UK CAA Film Monitor survey does not cover Northern Ireland. No nation substantially over- or under-indexes as having a heavy or light film viewing population compared to the other nations, e.g. English residents make up 84% of the overall population, 84% of the overall cinema audience, 84% of the audience of films on TV, and 83% of the overall TV audience.

Across the top 10 rankings all three nations feature a mix of genre types but there is evidence of nations seeking films which represent / depict themselves on screen. This is most notable in Scotland where the two films at the cinema with the heaviest Scottish profile were also set locally (*Wild Rose* and *Mary Queen of Scots*), along with another TV showing for The Proclaimers jukebox musical *Sunshine on Leith*, which makes the list for the third year running.

As mentioned above, Northern Ireland is not included in these tables but the films on TV with the strongest Northern Irish profile were *The Equalizer* (Film4, 12%), *Uncle Buck* (Channel 5, 11%), *Paddington* (CH4, 10%), *Herbie: Fully Loaded* (Channel 5, 10%) and *The Other Woman* (ITV2, 9%).

Table 13 Top 10 films at the cinema and on broadcast television in 2019 ranked by % profile of English viewers (age 7yrs+)

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
The Aeronauts (PG)*	92	Guardians Of The Galaxy (Film4)*	99
The Hustle (12A)	91	Pirates Of The Caribbean: On Stranger Tides (Film4)	98
Wonder Park (PG)	91	Robot And Frank (Film4)	98
Glass (15)	90	Pan (Film4)*	97
Charlie's Angels (12A)	90	Having You (ITV2)*	97
Terminator: Dark Fate (15)	90	Spooks: The Greater Good (ITV4)*	97
Stan & Ollie (PG)*	90	The Full Monty (Channel 5)*	96
Bad Boys For Life (15)	89	Mary Shelley's Frankenstein (ITV)*	96
Shazam! (12A)	89	Fast & Furious 6 (Channel 5)*	96
Avengers: Endgame (12A)*	88	What A Girl Wants (ITV2)*	96
England (7yrs+) average profile of all films	84	England (7yrs+) average profile of all films on TV	83
England (7yrs+) in survey population	84	England (7yrs+) in total TV audience	84

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

Table 14 Films with significant above-average audience profile amongst Scottish viewers (7yrs+), 2019 top films in cinema and on television

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Wild Rose (15)*	18	Gremlins (Channel 5)	29
Mary Queen of Scots (15)*	15	Hotel Transylvania (ITV2)	27
Spies In Disguise (PG)	13	Behind Enemy Lines (5Spike)	25
Yesterday (12A)*	13	Sunshine On Leith (ITV4)*	23
Knives Out (12A)	12	Shawshank Redemption (ITV2)	22
Green Book (12A)	12	Philomena (Film4)*	22
Dora and the Lost City of Gold (PG)*	12	The Rock (5USA)	21
Maleficent: Mistress of Evil (PG)*	11	The Heat (ITV2)	21
The Kid Who Would Be King (PG)*	11	The Golden Compass (CH4)*	21
Men in Black: International (12A)*	11	Jurassic Park III (CH4)	21
Scotland (7yrs+) average profile of all films	8	Scotland (7yrs+) average profile of all films on TV	8
Scotland (7yrs+) in survey population	8	Scotland (7yrs+) in total TV audience	9

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

Table 15 Films with significant above-average audience profile amongst Welsh viewers (7yrs+), 2019 top films in cinema and on television

Films in the cinema	% of audience in group	Film on TV (TV channel)	% of audience in group
Can You Ever Forgive Me (15)	15	Carry On Abroad (Film4) *	19
Gemini Man (12A)	14	The Dressmaker (ITV4)	18
Dora and the Lost City of Gold (PG)*	14	The Iceman (BBC 2)	17
Ad Astra (12A)	14	Black Beauty (BBC 2) *	16
UglyDolls (U)	14	The Heat (ITV2)	15
Knives Out (12A)	14	The Last Stand (E4)	15
Stephen King's Doctor Sleep (15)	13	The Love Punch (Film4)	15
Horrible Histories The Movie – Rotten Romans (PG)*	13	John Wick (Film4)	14
Annabelle Comes Home (15)	13	The Love Punch (Film4)	14
Hustlers (15)	13	Need For Speed (Film4)	14
Wales (7yrs+) average profile of all films	8	Wales (7yrs+) average profile of all films on TV	5
Wales (7yrs+) in survey population	8	Wales (7yrs+) in total TV audience	5

Source: CAA Film Monitor, 2019, BARB/TechEdge

Notes:

See notes to Figure 2 and Table 3

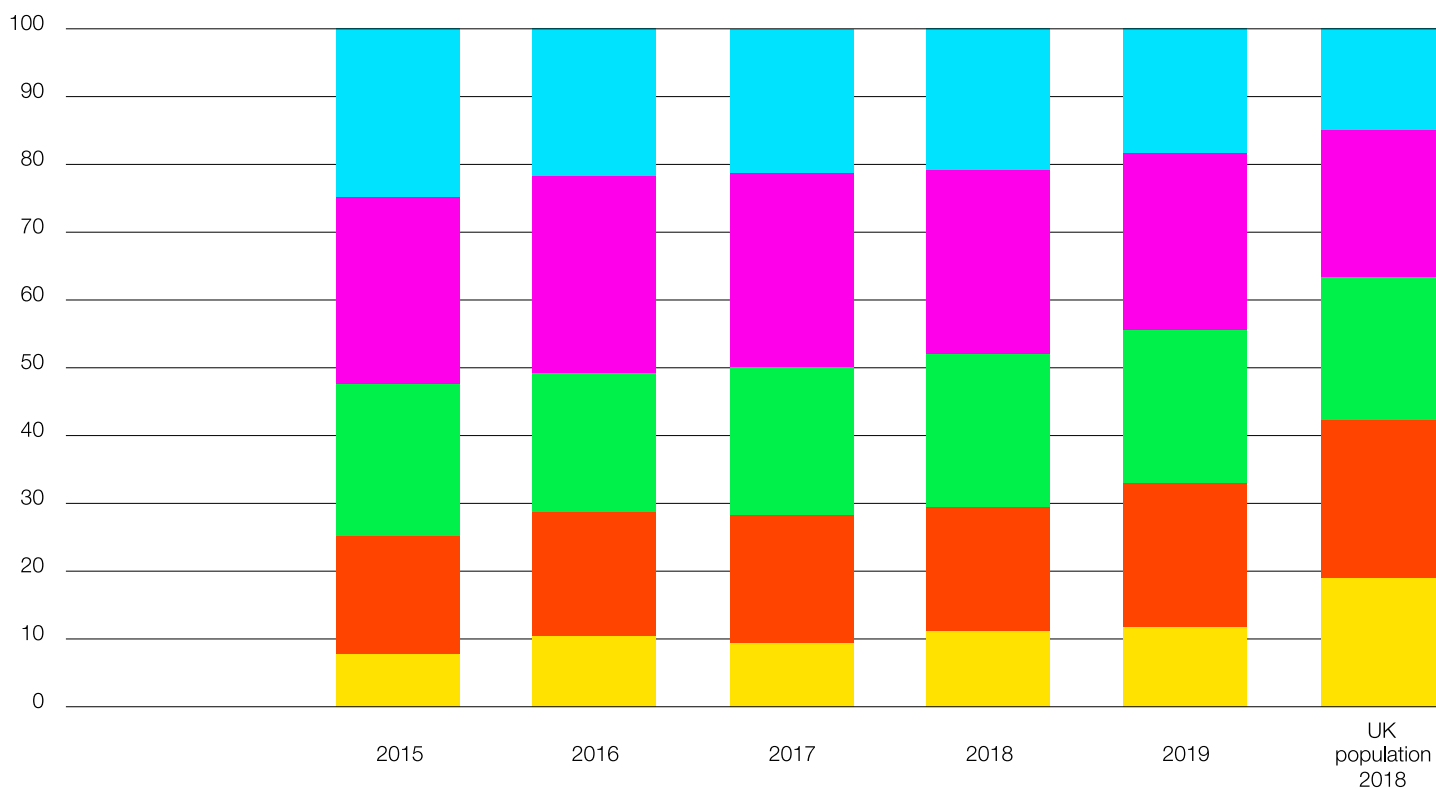
SUBSCRIPTION VIDEO ON DEMAND

There has been rapid take-up of SVoD services in the UK in recent years, with over 14 million households having access to one or more these services in 2019 (see the Film On Digital Video chapter). Figure 7 demonstrates that whilst the age profile of SVoD users has gradually moved to be more representative of the UK population, users still skew young in comparison with the general population. In 2019, users aged 18-34 made up 44% of the SVoD audience compared with 37% for the UK population as a whole, but this difference is gradually diminishing as penetration increases.

In terms of socio-economic status, the overall SVoD audience skews slightly more ABC1 than the general population, but this difference has also been decreasing with growing take-up, with only a 3% point difference between the 2019 SVoD ABC1 profile and the UK population. The gender balance has been close to evenly split since 2015, with males making up 49.5% of the audience in 2019, relatively unchanged from the previous year.

Figure 7 UK SVoD audience profile by age, 2015-2019

% of group in audience



Age 18-24	24.8	21.7	21.2	20.8	18.4	14.9
Age 25-34	27.6	29.1	28.7	27.1	26.0	21.8
Age 35-44	22.4	20.5	21.8	22.7	22.7	21.1
Age 45-54	17.3	18.3	18.8	18.2	21.1	23.3
Age 55-64	7.9	10.5	9.5	11.2	11.9	19.0
Male	53.0	49.9	51.4	50.1	49.5	49.9
ABC1	59.4	62.6	61.0	59.7	57.5	54.4

Source: Ampere Analysis, Consumer Surveys 2015-2019, UK adults (18-64). Base: 2015 (330), 2016 (794), 2017 (2,188), 2018 (2,474), 2019 (2,909)

Notes:

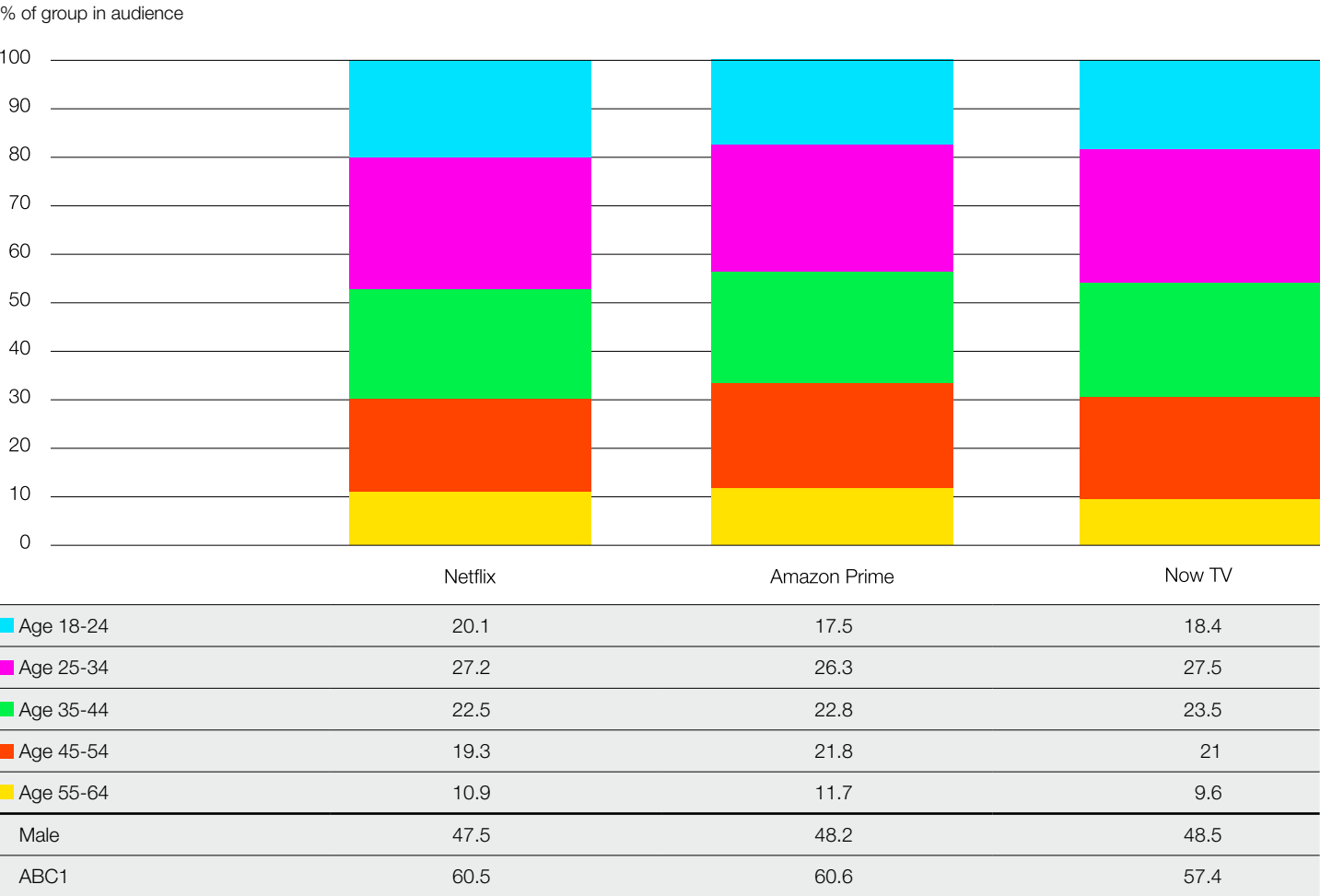
This profile is for 'all users' and includes those that also watch television programmes as well as the films available on these services.

* UK population based on sample breakdown weighted to represent 18-64 year olds.

USER PROFILE FOR SELECTED SVOD SERVICES

Whilst there is a growing number of subscription on-demand and streaming services available to UK audiences, in 2019 the three main providers continued to be Netflix, Amazon Prime Video and Now TV. (Information on reach for these services is shown in the Film On Digital Video chapter.) The audience profile of users is broadly similar for all three services: all three have a slightly more female user profile, and all over-index for the ABC1 socio-economic group (the average ABC1 profile for the three platforms is 60% compared to 54% of the UK population) (Figure 8).

Figure 8 User profile of selected SVoD services in the UK by age, 2019



Source: Ampere Analysis, Consumer Surveys 2019, UK adults (18-64).

Notes:

This profile is for 'all users' and includes those that also watch television programmes as well as the films available on these services.

FILM PREFERENCES ON SVOD PLATFORMS

Tables 16-20 show the top 10 titles with the highest profile by age group and gender (as % of all adults 18yrs +) for films available to stream on Netflix, Amazon Prime and Now TV in 2019. Note these tables do not represent the films seen by the largest number of viewers within the gender or age group, but rather the films whose audience, regardless of size, delivered the highest proportion as a % of all adults (18yrs +) by each demographic sub-group.

Differences in preference by gender for films streamed through SVoD platforms mirror those of audiences for films shown at the cinema or on television (Tables 16 and 17). Female viewers over-index in the audience for films with strong female characters, romances and family friendly films, while male viewers over-index in the audience for action-driven titles.

As expected from the overall SVoD user profiles described above, younger age groups make up the largest proportion of the audience for film on SVoD, with the 18-34 year old age group accounting for 44% of the total time spent watching film on SVoD. In 2019 *Shrek* was the film title with the highest proportion of its audience from this group (83%). Other family favourites like *Hotel Transylvania* and *How the Grinch Stole Christmas* also made their top 10 list.

Table 16 Top 10 films by highest % profile of women on SVoD platforms, 2019

	% of audience who are women
To All the Boys I Loved Before	97
The Holiday	93
Hotel Transylvania	92
A Simple Favour	92
How the Grinch Stole Christmas	91
Isn't It Romantic	91
Pitch Perfect	91
Mamma Mia!	89
A Christmas Prince	88
The Christmas Chronicles	88
Total film on SVoD	50

Source: GfK SVoD Weekly Consumption Tracker, 2019. All adults (18+) who watch SVoD at least once every two weeks. Base (10,805)

Table 17 Top 10 films by highest % profile of men on SVoD platforms, 2019

	% of audience who are men
Rogue One: A Star Wars Story	87
Avengers: Age of Ultron	76
Triple Frontier	75
Polar	75
The Irishman	74
Fast & Furious 8	72
The Ballad of Buster Scruggs	71
Shaft (2000)	70
Mission: Impossible - Ghost Protocol	70
The Lord of the Rings: The Two Towers	69
Total film on SVoD	50

Source: GfK SVoD Weekly Consumption Tracker, 2019. All adults (18+) who watch SVoD at least once every two weeks. Base (10,805)

Table 18 Top 10 films by highest % profile of viewers aged 18-34 on SVoD platforms, 2019

	% of audience who are 18-34
Shrek	83
Hotel Transylvania	79
To All the Boys I Loved Before	79
Pitch Perfect	76
The Knight Before Christmas	75
Twilight (2008)	73
How the Grinch Stole Christmas	72
Pokemon the Movie: I Choose You!	71
The Hangover	70
Despicable Me 3	68
Total film on SVoD	44

Source: GfK SVoD Weekly Consumption Tracker, 2019. All adults (18+) who watch SVoD at least once every two weeks. Base (10,805)

Table 19 Top 10 films by highest % profile of viewers aged 35-54 on SVoD platforms, 2019

	% of audience who are 35-54
The Commuter	65
Guardians of the Galaxy Vol. 2	57
Matilda	55
Cloudy with a Chance of Meatballs 2	54
Triple Frontier	54
The Lord of the Rings: The Two Towers	53
The Boy in the Striped Pajamas	51
Jack Ryan: Shadow Recruit	50
Dumplin	50
Wine Country	48
Total film on SVoD	37

Source: GfK SVoD Weekly Consumption Tracker, 2019. All adults (18+) who watch SVoD at least once every two weeks. Base (10,805)

Table 20 Top 10 films by highest % profile of viewers aged 55+ on SVoD platforms, 2019

	% of audience who are 55+
The Equalizer	49
The Ballad of Buster Scruggs	49
The House with a Clock in Its Walls	46
Star Trek Into Darkness	36
The King	35
Jack Ryan: Shadow Recruit	34
The Boy in the Striped Pajamas	34
In the Tall Grass	34
Mamma Mia!	33
The Mummy (2017)	33
Total film on SVoD	19

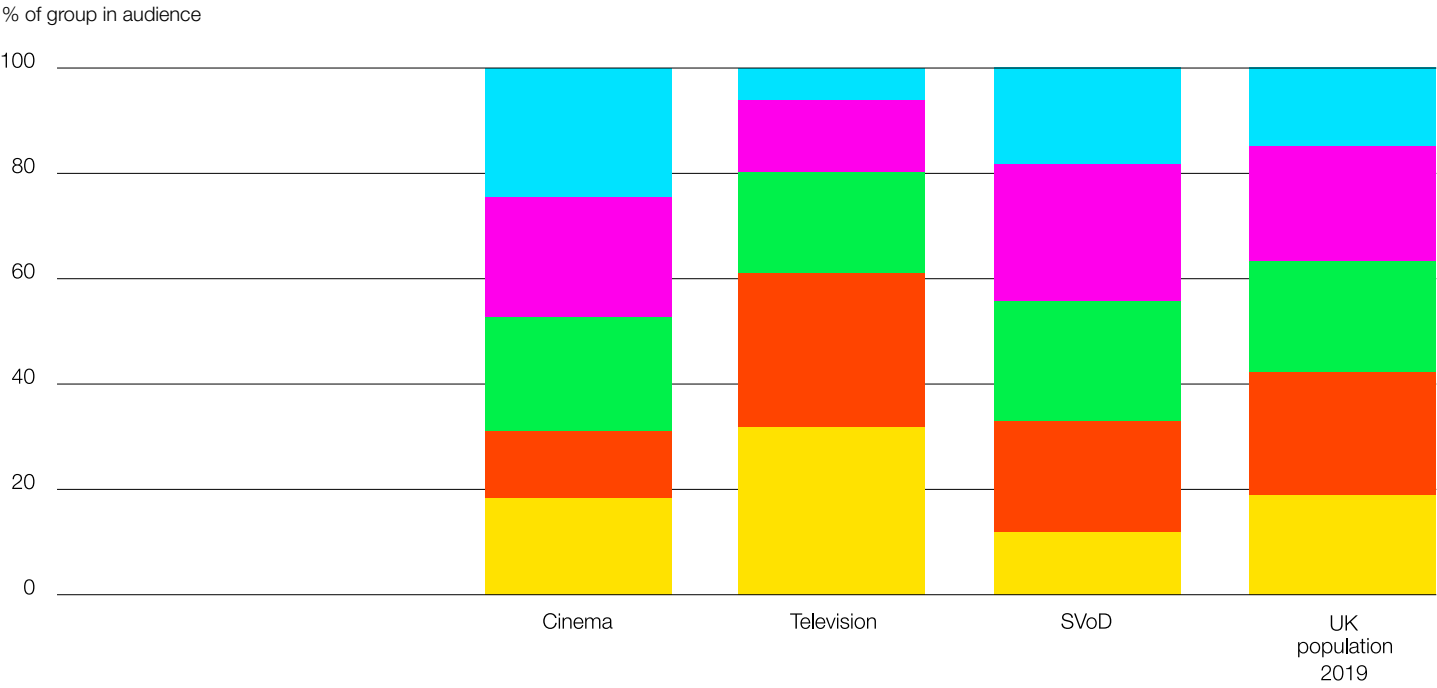
Source: GfK SVoD Weekly Consumption Tracker, 2019. All adults (18+) who watch SVoD at least once every two weeks. Base (10,805)

AUDIENCE PROFILE COMPARATIVE ANALYSIS

This chapter has focused on comparing demographic profiles and preferences of the audience for the three most used platforms that show film. However, due to the different methodologies used to collect the data and the different sampling criteria, it is difficult to draw reliable and accurate comparisons between them. Figure 9 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 includes all content watched on these platforms, television series and non-feature documentaries, so is not exclusively based on a 'film-only' audience.

There are points of similarity between the audiences for cinema and SVoD. Compared to the overall population profile both have younger audiences (47% are aged 18-34 years old in the cinema audience, and 44% in SVoD), and a higher socio-economic profile (65% are ABC1 in the cinema audience, 58% in SVoD). In contrast to cinema and SVoD audiences, television audiences have an older profile with 61% being in the 45-64 year old age group, and are more C2DE in socio-economic terms, with 56% being C2DE.

Figure 9 Comparative UK audience profiles: cinema, television and SVoD, 2019



Age 18-24	24.4	5.9	18.4	14.9
Age 25-34	22.9	13.7	26.0	21.8
Age 35-44	21.5	19.3	22.7	21.1
Age 45-54	12.8	29.2	21.1	23.3
Age 55-64	18.4	31.9	11.9	19.0
Male*	49.3	49.9	49.5	49.9
ABC1*	64.8	44.5	57.5	54.4

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

Notes:

CAA data based on all films released in 2019 and captured in the CAA's Film Monitor research. Titles (88), Base (14,106).

BARB/TechEdge data filtered on all titles transmitted on all BARB subscribed channels in 2019.

Ampere Analysis Consumer Survey 2019, Audience profile for all UK SVoD services. UK adults (18-64), Base (2,909).

* Based on adults aged 18-64.



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