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# AUDIENCES

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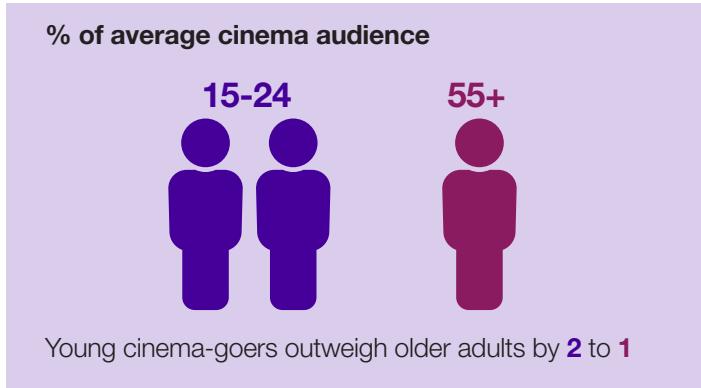
# Facts in focus

## AUDIENCE FOR FILM IN THE UK



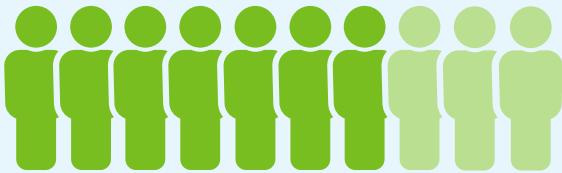
of UK adults watch a film or movie at least **once** every **six months**

## CINEMA AUDIENCE BY AGE



## FILM PREFERENCE BY AGE

### Youngest skewing title at cinema



**7** out of **10** cinema-goers who saw US low-budget horror Truth or Dare were aged 15-24

### Oldest skewing title at cinema

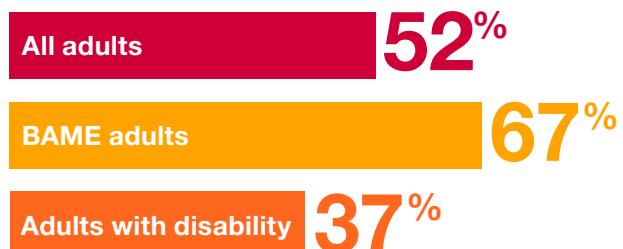


**7** out of **10** cinema-goers who saw UK independent film On Chesil Beach were aged 55+

## CINEMA AUDIENCE DIVERSITY

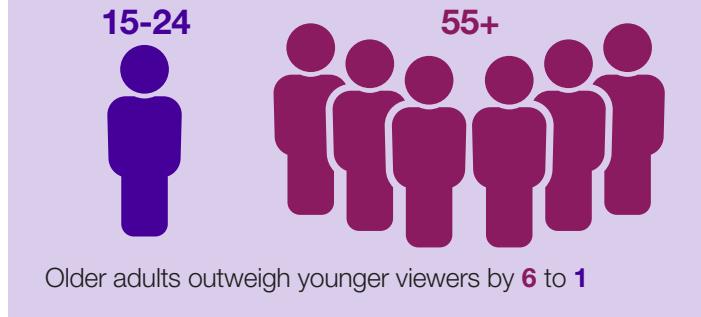
Black and minority ethnic (BAME) adults over-index vs all adults as cinema-goers while adults with a disability under-index

### % of group who watch film at the cinema



## TELEVISION AUDIENCE FOR FILM BY AGE

### % of average television audience for film



## AGE PROFILE FOR FILM AUDIENCES ACROSS PLATFORMS

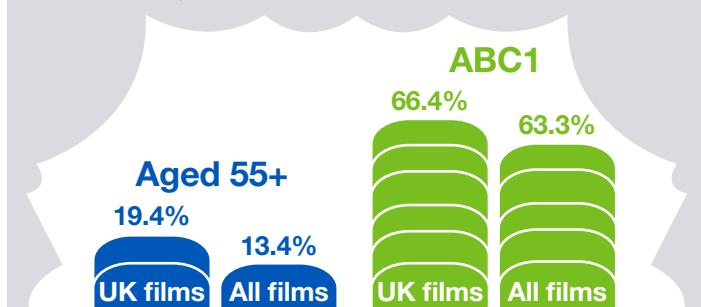
### % of audience aged 18-24



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

## CINEMA AUDIENCE FOR UK FILMS

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



# Audiences

## DATA ON THE UK FILM AUDIENCE

The audience lies at the heart of a vibrant and successful film economy and culture. However, following a decade of disruption ushered in, chiefly, by the emergence of on-demand distribution platforms, UK audiences are faced with a myriad of choices in terms of how and where to watch film. The immensity – and tyranny – of choice is coupled with fragmentation of the shared experience and increasing polarisation in the types of film available, and viewed, on different platforms. Not only is this driven by the curatorial control of gatekeepers (exhibitors and platform providers), it is also a feature of changing audience tastes and behaviours, particularly those driven by generational differences.

In order to provide a more comprehensive picture of audiences across all film distribution platforms, this year's chapter includes new data from a survey commissioned by the BFI and designed to provide insight on film consumption for a wider selection of demographic groups than currently available from traditional industry sources. We also include data provided by sector specialist agencies which are tracking audience reach and consumption for the newer-to-market subscription streaming services. These services have all shown exponential growth in recent years and this is likely to

continue into 2019 and beyond, so these early read-outs are valuable for informing the future as this element of the sector will evolve further with the launch of new services such as Apple TV+, BritBox and Disney+.

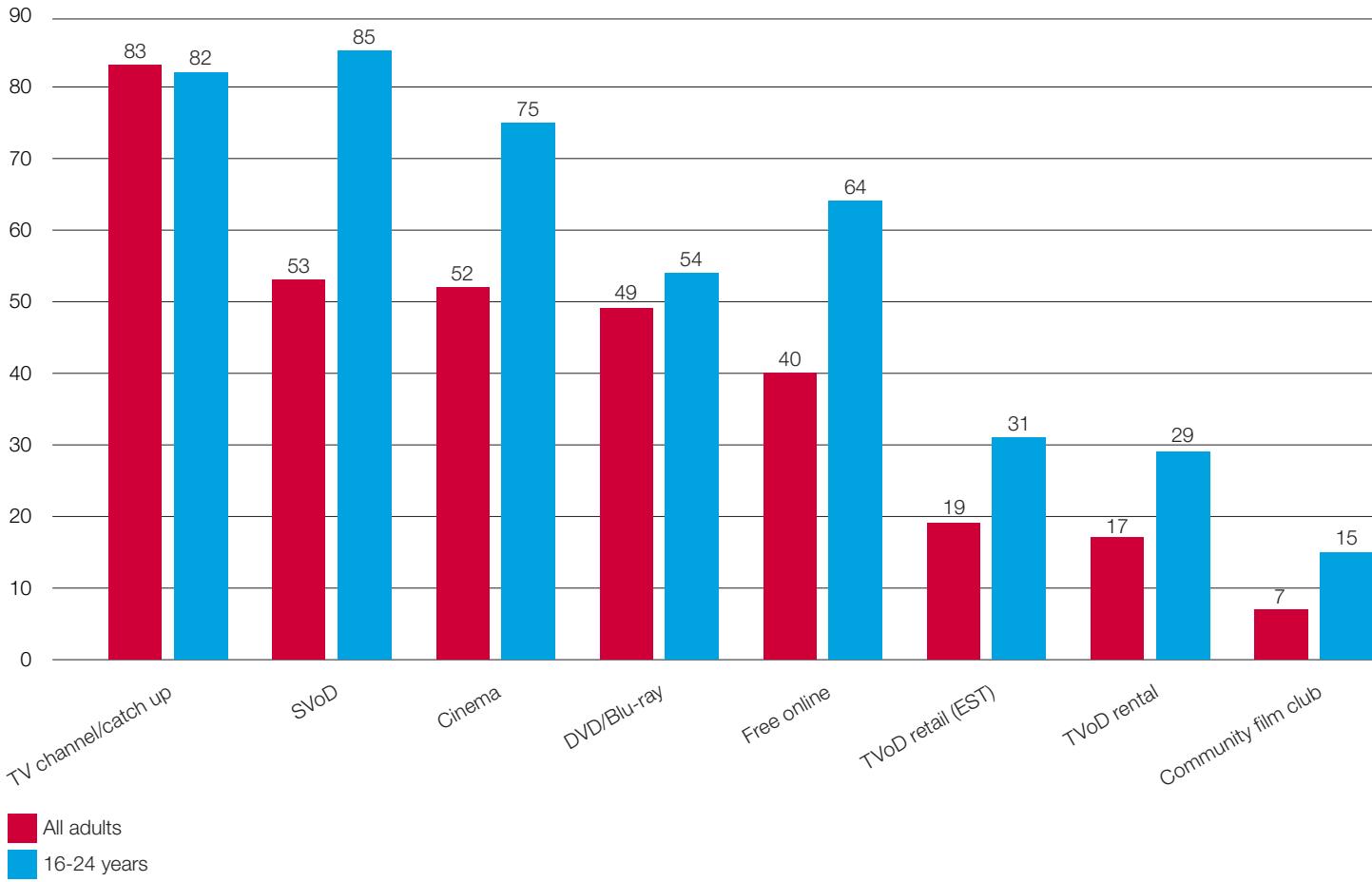
## AUDIENCES FOR FILM IN THE UK BY PLATFORM

When asked whether they had viewed a film on any platform in the previous six months, 94% of the UK adult population (aged 16+) responded positively. Amongst all adults (Figure 1) the largest reach (83%) was for films shown on television, but the most popular platform amongst 16-24 year olds (85%) was subscription video-on-demand (SVoD), which underscores the strength of these services in attracting the attention of younger adults.

Whilst the data are not directly comparable with those shown in last year's edition of the Yearbook, which were based on a three-month reach, the pattern of reach is virtually unchanged in terms of the relativity between the various platforms available to audiences. It should be noted that these figures represent total reach, so they do not take account of the fact that some audiences may be far more frequent viewers of film on certain platforms.

**Figure 1 Audiences for film in the UK by platform**

% of UK adults



Source: Establishment Survey, 2018 BFI/Populus

Q: In the last six months have you watched a film/movie in any of the following ways? Base: UK adults 16+ (10,495), 16-24yrs (1,179).

## AUDIENCES FOR FILM AMONGST OTHER DEMOGRAPHIC GROUPS

This year, we are able to extend our analysis of audience reach with measures amongst a wider selection of demographic groups including some of the protected characteristics, such as disability and sexual orientation.

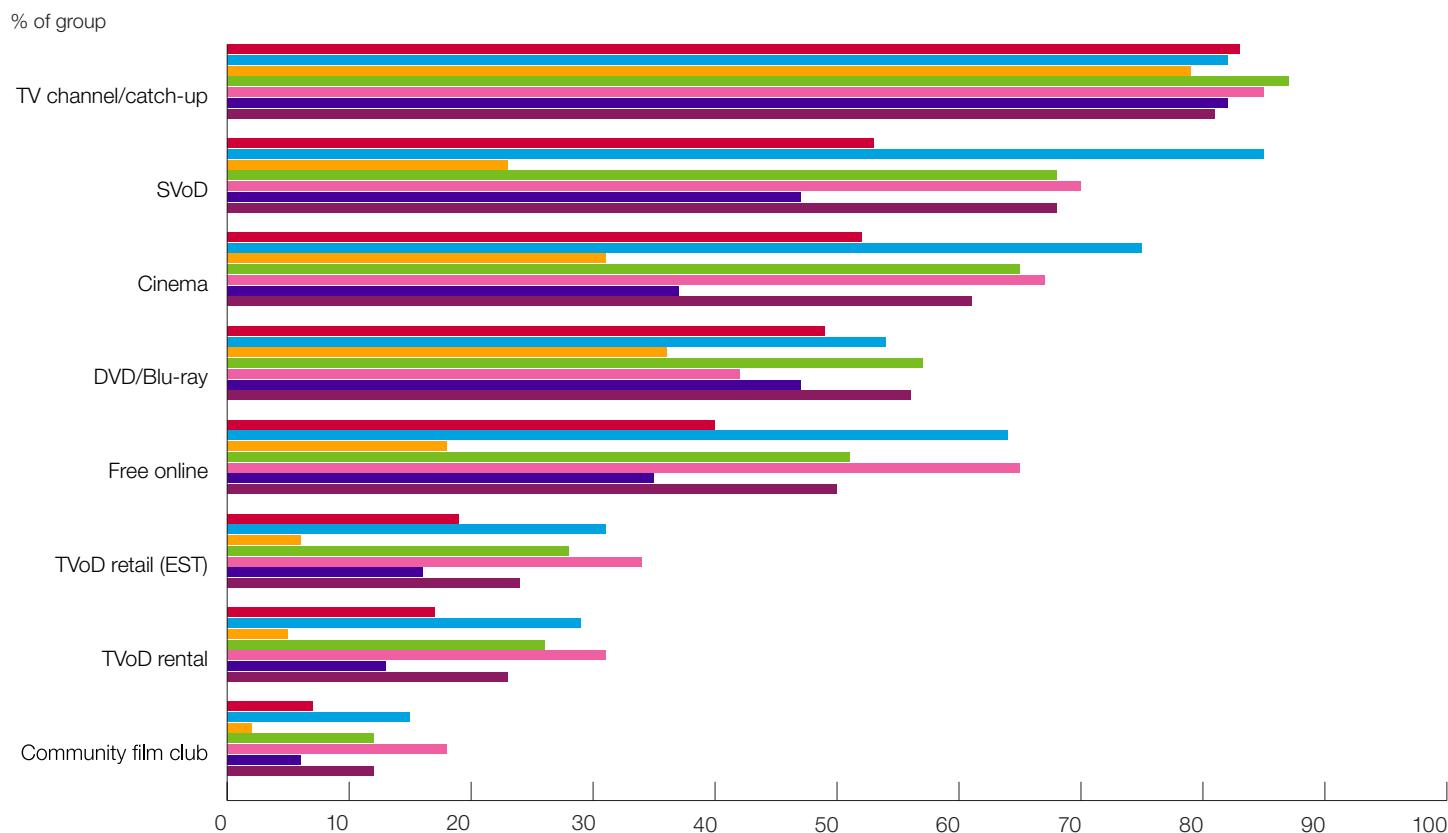
As Figure 2 shows, audiences for film on television show the most consistency across all groups, with very little separating any individual group from the all-adult average. Despite the growth of other platforms, television remains the single most important route by which film is able to reach mass audiences across all demographic groups.

As has already been demonstrated, young adults (16-24) show particular outlier behaviour in their consumption of film. They are seemingly voracious consumers across most platforms; their propensity to watch film on SVoD platforms being well above that of most other groups whilst they also remain the core audience at the cinema, particularly for mainstream content. This data shows that they also seek out film on free online platforms, both legal and unauthorised.

Mirroring the fact that the BAME population in the UK skews towards the younger age groups, there are parallels in the reach for film on most platforms between these two groups (this is also seen in those with children in the household). BAME adults, whilst similar in their film consumption to younger audiences, show above-average reach for film accessed from free online services. This could be a factor determined by the desire of this group to seek out films reflecting their cultural origins or traditions which may be less available via the majority of cinema, television or SVoD providers.

At the other end of the scale are those in older age groups and those with a disability, for which there are parallels. Individuals with a disability are more likely to be in the older age groups, particularly those with physical impairments which might make visiting a cinema and watching a film difficult and/or impossible. Both older adults (65+) and those with a disability under-index vs all adults for watching film at the cinema. However, these groups clearly watch films on television, with reach not far short of that for all adults on this platform, although they are less likely to consume film on digital platforms. Whilst accessibility may not be an impairment to viewing, these groups are less likely to be online literate or confident with the technology required for access.

**Figure 2 Audiences for film in the UK by platform by demographic group**



	TV channel/ catch-up	SVoD	Cinema	DVD/Blu-ray	Free online	TVoD retail (EST)	TVoD rental	Community film club
All adults	83	53	52	49	40	19	17	7
16-24 yrs	82	85	75	54	64	31	29	15
65+	79	23	31	36	18	6	5	2
Adults with children under 18	87	68	65	57	51	28	26	12
BAME	85	70	67	42	65	34	31	18
Disability	82	47	37	47	35	16	13	6
LGBTQ	81	68	61	56	50	24	23	12

Source: Establishment Survey 2018, BFI/Populus

Q: In the last six months have you watched a film/movie in any of the following ways? Base: UK adults 16+ (10,495), 16-24yrs (1,179), 65yrs+ (2,470), wch<18yrs (2,782), BAME (708), With a disability (2,603), LGBTQ (705).

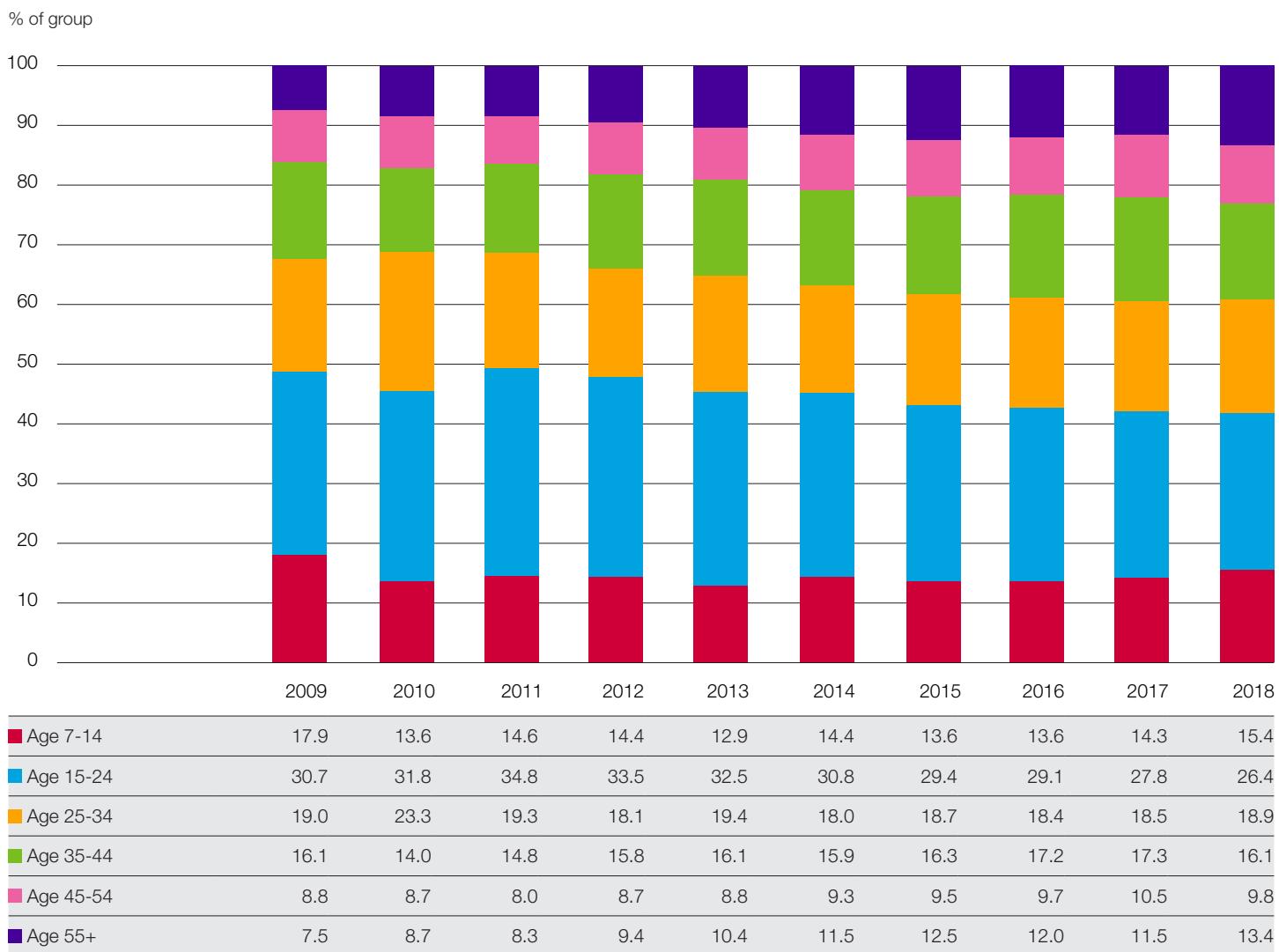
## CINEMA AUDIENCE BY AGE

Figure 3 shows the trends by age for cinema admissions between 2009 and 2018. It should be noted that admissions here are based on weighted averages of the audience profiles for all releases reported by the Cinema Advertising Association (CAA) Film Monitor.

The relative proportion of admissions for each category has been broadly similar throughout the period, with the exception of audiences drawn from the 15-24 and 45+ age groups. 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 2018, and a compensating increase in the admissions share of cinema-goers aged 45 or over, which rose from a low of 16% to a high of 23% in the same period. (The 45+ age groups also accounted for 16% of admissions in 2009.)

The rising share for older cinema-goers cannot purely be attributable to an increase in the proportion of this age group in the general population, as the cinema admissions trend has outstripped this. Although there were a number of films released in 2018 that were aimed specifically at an older audience (e.g. *Darkest Hour* and *Finding Your Feet*), there were also films not necessarily targeted at this age group which attracted either a large proportion of older cinema-goers in their audiences or high reach amongst this age group (e.g. a majority of the audience for *Three Billboards Outside Ebbing, Missouri* was aged 45 or over).

**Figure 3 Age distribution of cinema audience, 2009-2018**



Source: CAA Film Monitor, 2018

Notes: 'Cinema audience' in this chart and throughout this chapter refers to 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 included 88 film titles (mostly mainstream) of the theatrical releases in 2018. 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. The survey does not cover Northern Ireland.

## CINEMA AUDIENCE BY GENDER AND SOCIO-ECONOMIC STATUS

According to CAA Film Monitor data, males slightly over-indexed (51%) in the cinema audience in 2018 (52% in 2017) compared with their representation in the UK population as a whole (49%). Table 1 shows, however, that this is not consistent by age group. While cinema audiences drawn from the 7-14, 15-24 and 25-44 age groups all skewed towards men, amongst audiences aged 35 or over women (55%) outweighed men, and compared with 2017, increased their representation by four percentage points.

The average cinema audience consistently attracts a disproportionate share of individuals from the higher socio-economic grades in all age groups compared with the general population. This is most marked amongst the 35+ audience, 70% of which was comprised of ABC1 cinema-goers in 2018, an increase of three percentage points compared with 2017.

**Table 1 Cinema audiences by age and gender/social grade, 2018**

	Cinema audiences					UK population 7+ %
	Age 7-14 %	Age 15-24 %	Age 25-44 %	Age 35+ %	All 7+	
Males	55	55	54	45	51	49
Females	45	45	46	55	49	51
ABC1	60	57	64	70	63	54
C2DE	40	43	36	30	37	46

Source: CAA Film Monitor, 2018



## CINEMA AUDIENCE FOR UK FILMS

This section looks at the audience profile for UK films as a subset of all film. Of the 88 films covered by the CAA Film Monitor, 33 were UK qualifying productions, of which 15 were UK independent titles.

As Table 2 shows, the audience profile for UK films is slightly different to that for all film. UK films attracted a higher proportion of their audience from the older age groups, particularly those aged 55 or over, buoyed by films featuring more mature protagonists such as *Darkest Hour*, *Finding Your Feet* and *Three Billboards Outside Ebbing, Missouri*. UK films skewed very slightly more female than all film, but had a more upmarket audience profile than that for all film.

**Table 2 Audience profile of UK films compared with all film, 2018**

	UK films	All film (including UK films)
	%	%
Age 7-14	13.6	15.4
Age 15-24	22.4	26.4
Age 25-34	17.8	18.9
Age 35-44	15.3	16.1
Age 45-54	11.5	9.8
Age 55+	19.4	13.4
Male	50.6	51.2
Female	49.4	48.8
ABC1	66.4	63.3
C2DE	33.6	36.7
England	83.8	83.5
Scotland	8.0	8.6
Wales	8.2	7.9

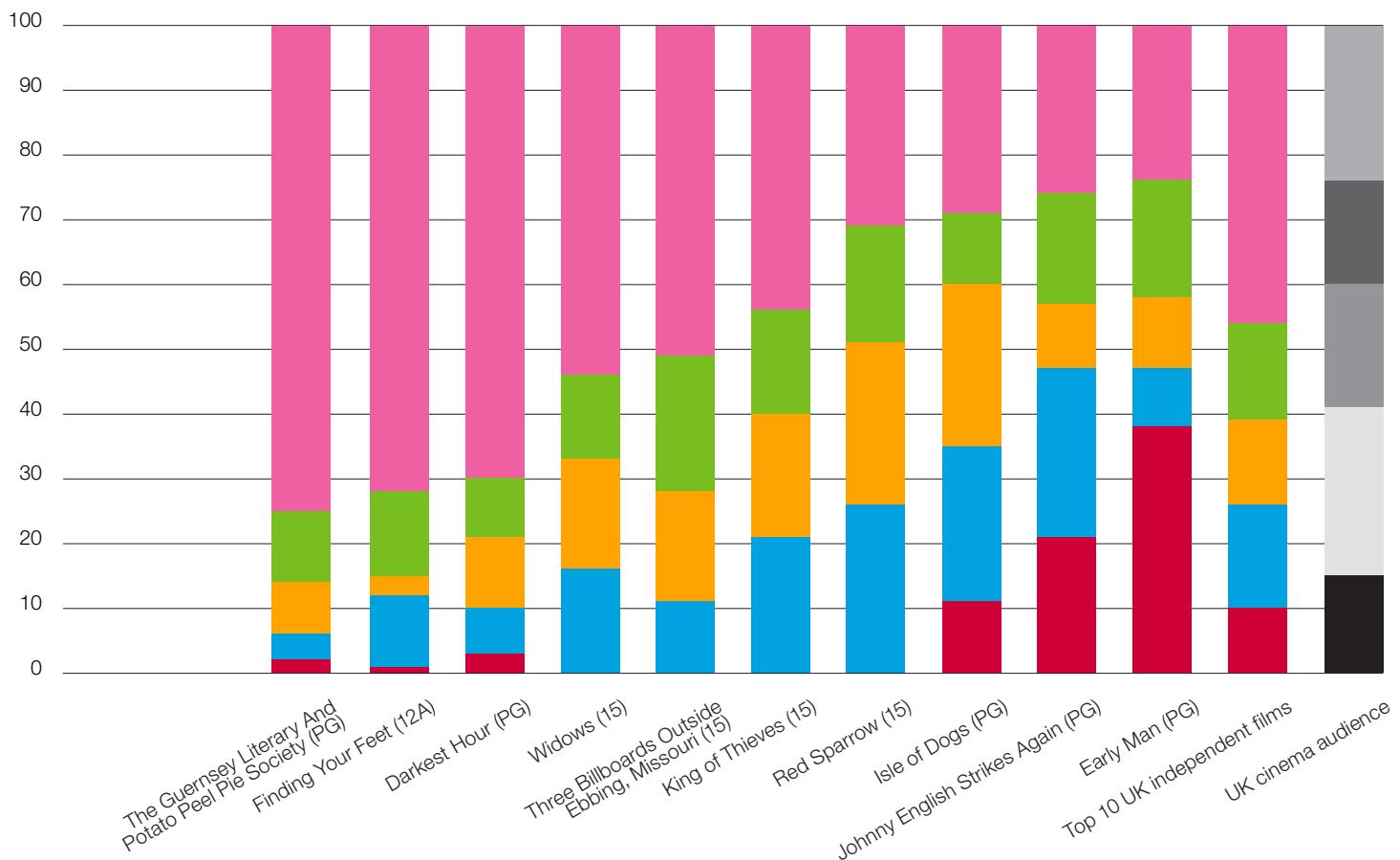
Source: CAA Film Monitor, 2018

Base: all films, 88 titles, n=130,496; UK films, 33 titles, n=58,494.

The top 10 UK independent films released in 2018 show a broad appeal across all age groups, and a rising preference in line with audience age (Figure 4). Over half of the audience for five of the top 10 titles was drawn from cinema-goers aged 45 or over, while this age group made up 70% of the audience for three of these titles: *The Guernsey Literary and Potato Peel Society*, *Finding Your Feet* and *Darkest Hour*. (The 45+ age group accounted for 47% of the combined audience for the top 10 UK independent films.) At the other end of the scale, as might be expected, the Aardman animation *Early Man* attracted a plurality of 7-14 year olds, whilst the comedy and thriller titles *Johnny English Strikes Again*, *Red Sparrow* and *Isle of Dogs* attracted the majority of their audiences from cinema-goers aged 34 or under.

**Figure 4 Cinema audience profile by age for the top 10 UK independent film titles, 2018, ranked by % of 45+ age group in audience**

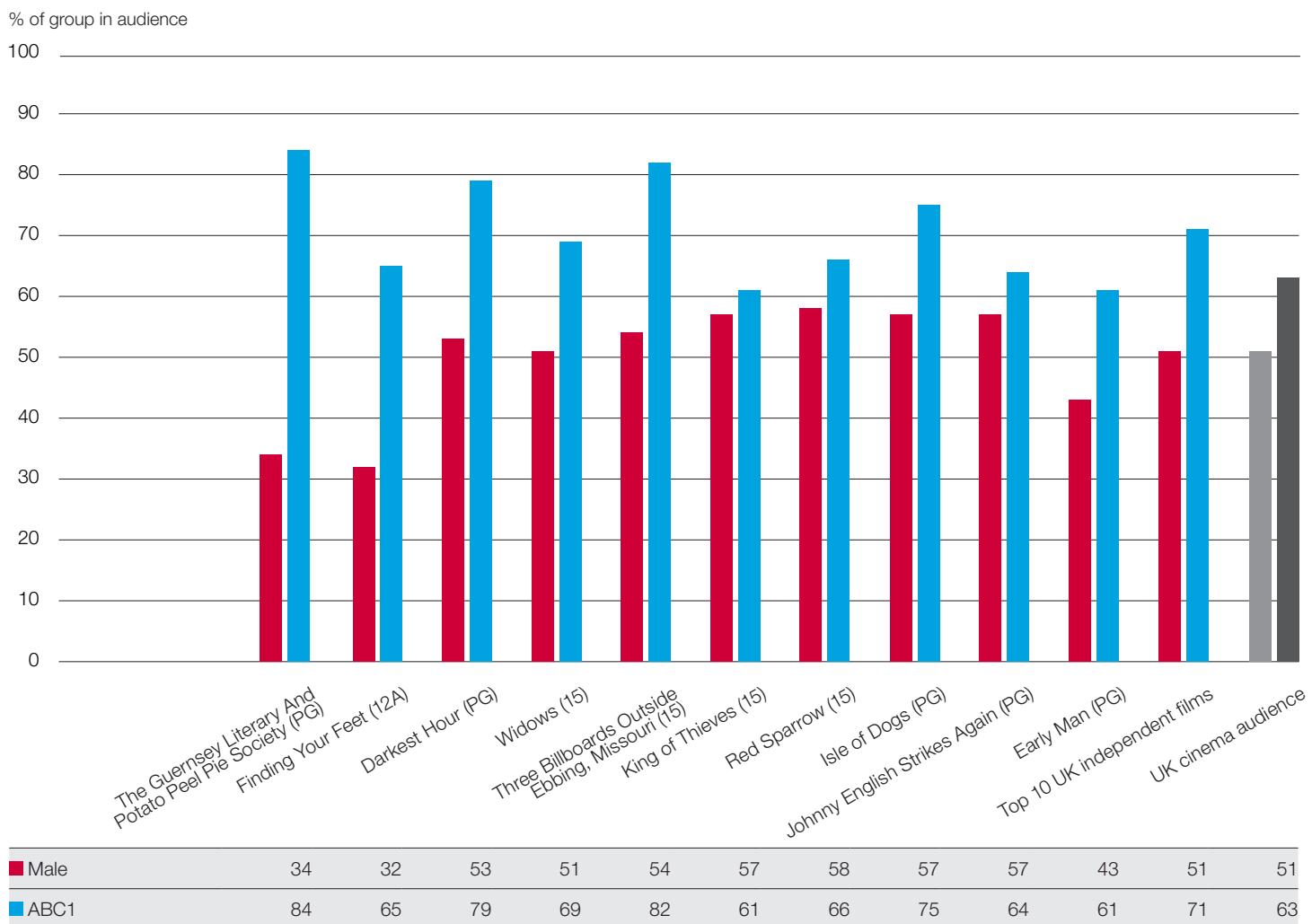
% of group in audience



Source: CAA Film Monitor, 2018

As Figure 5 shows, a majority of the top 10 UK independent films attracted a higher proportion of males than the average cinema audience in 2018, with only three of the top 10 titles – *The Guernsey Literary and Potato Peel Pie Society*, *Finding Your Feet* and *Early Man* – over-indexing for female audience members. With the exception of *King of Thieves* and *Early Man*, all of the top 10 titles attracted audiences with higher socio-economic status than the overall cinema audience.

**Figure 5 Cinema audience profile by gender and socio-economic status for the top 10 UK independent film titles, 2018, ranked by profile of audience aged 45+**



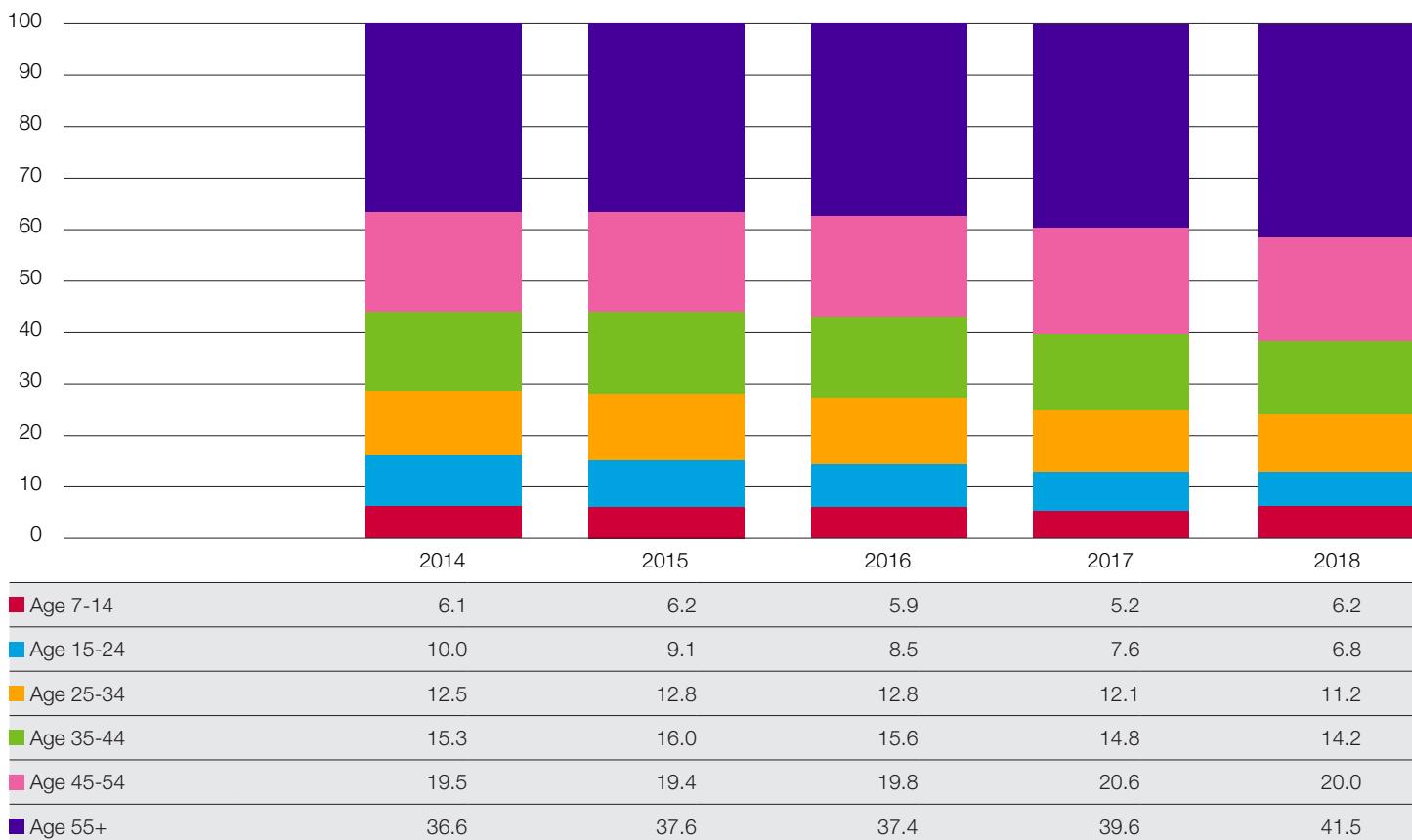
Source: CAA Film Monitor, 2018

## AUDIENCES FOR FILM ON TELEVISION

The age distribution of audiences for films watched on television differs 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, both for film and across all broadcast television, again at a faster rate than within the UK population as a whole. As Figure 6 shows, the proportion of older (45+) viewers increased by 10% between 2014 and 2018, whilst the share of 15-24 year olds decreased by 32% during the same period (consistently shrinking by around 9% each year).

**Figure 6 Age distribution of television audiences for film, all channels, 2014-2018**

% of group in audience



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

Note: 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, and which 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 e.g. CBBC and BBC One, then the average is taken for all transmissions per channel (not aggregated across all showings).

## 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 2018 and captured in the CAA Film Monitor. This is compared with the equivalent for all films transmitted on any television channel (including pay TV). This means that the tables do not represent the films seen by the largest number of viewers within each age group, but rather the films whose audience, regardless of size, delivered the highest proportion of each age group.

As Table 3 shows, family films and animated features appealed most to 7-14 year olds across both the film and television lists. Interestingly, 15 of the films with the largest profile of 7-14 year olds are either sequels or based on existing book or television series, suggesting that film viewers in this age group (or perhaps their parents or guardians) are particularly attracted to familiarity. The in-cinema title with the greatest appeal to this group was the comedy sequel *Goosebumps 2: Haunted Halloween*, while the top-indexing film on television was the fourth title in the Diary of a Wimpy Kid film series.

**Table 3 Films with a significant above-average audience profile in the 7-14 age group, 2018 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
Goosebumps 2: Haunted Halloween	59	Diary of a Wimpy Kid: The Long Haul (Sky Cinema Premiere)	47
Teen Titans Go! To the Movies	45	Hop (Sky Cinema Family)	42
Ferdinand	43	The Lego Ninjago Movie (Sky Cinema Premiere)	38
Hotel Transylvania 3: A Monster Vacation	42	Diary of a Wimpy Kid (Channel 4)	30
Coco	40	Spy Kids (ITV2)	29
Early Man (UK)	38	Sony Smurf Shorts (ITV2)	28
Smallfoot	37	Evan Almighty (ITV2)	28
A Wrinkle in Time	37	The Smurfs (ITV2)	27
Nativity Rocks! (UK)	33	The Lego Movie (5STAR)	25
Peter Rabbit	33	How the Grinch Stole Christmas (ITV)	25
7-14yrs average profile of all films	15	7-14yrs average profile of all films on TV	6
7-14yrs in survey population	10	7-14yrs in total TV audience	4

Source: CAA Film Monitor, 2018, BARB/TechEdge

See notes to Figures 3 and 6.

The 15-24 year old age group made up 26% of the average cinema audience in 2018 compared with only 7% of the audience for film on television. Titles offering thrills and spills typically dominate the list of in-cinema films that appeal most to this group. The release with the greatest appeal in 2018 was the low-budget horror *Truth or Dare*. (As in 2017, the most popular in-cinema title in this age group was produced by horror maven Jason Blum which also, as in the previous year, was one of three Blum projects to feature in the top 10 in-cinema titles.) The most popular films watched on television among this group were a broader mix with action, adventure, comedy and romance titles making up the majority of the top 10 list.

The proportion of the audience from this age group skews very much higher for the top in-cinema film with seven out of 10 viewers aged 15-24 compared with one in four for the top skewing television title.

**Table 4 Films with a significant above-average audience profile in the 15-24 age group, 2018 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
Truth or Dare	71	The Hunger Games (E4)	26
The Nun	66	Step Up 3 (ITV2)	26
Insidious: The Last Key	64	2 Fast 2 Furious (ITV2)	26
Hereditary	59	Step Up 2: The Streets (ITV2)	25
Blockers	58	Ted (E4)	24
The First Purge	53	The Mortal Instruments: City of Bones (E4)	24
Love, Simon	50	Rough Night (Sky Cinema Premiere)	24
Den of Thieves	48	Ted (ITV2)	23
A Quiet Place	46	Rise of the Planet of the Apes (E4)	22
The Spy Who Dumped Me	45	Fast & Furious 8 (Sky Cinema Premiere)	22
15-24yrs average profile of all films	26	15-24yrs average profile of all films on TV	7
15-24yrs in survey population	14	15-24yrs in total TV audience	5

Source: CAA Film Monitor, 2018, BARB/TechEdge

See notes to Figures 3 and 6.

Films over-indexing at the cinema for the 25-34 year old age group show a wide variety of tastes with action, comedy, drama, horror and thriller titles all featuring in the top 10 list. The genre mix of over-indexing films on television during the year was smaller, with romantic and action comedies being the most popular. Interestingly, a number of the comedy titles centred on issues pertinent to the lives of this age group – relationships, children and setting up home. Popular films on television also included a number of titles suitable for watching with young children.

**Table 5 Films with a significant above-average audience profile in the 25-34 age group, 2018 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
Game Night	35	Cheaper by the Dozen (E4)	37
A Simple Favour	32	Moana (Sky Cinema Disney)	35
Fifty Shades Freed	31	Grown Ups 2 (5STAR)	35
A Quiet Place	31	Bad Neighbours 2 (Channel 4)	34
Den of Thieves	31	Captain Underpants: The First Epic Movie (Sky Cinema Premiere)	34
BlacKkKlansman	29	22 Jump Street (ITV2)	34
Molly's Game	29	Baywatch (Sky Cinema Premiere)	33
Venom (UK)	28	The Wolf of Wall Street (Film4)	32
Deadpool 2	28	Life as We Know It (Channel 5)	32
The First Purge	26	American Reunion (ITV2)	31
25-34yrs average profile of all films	19	25-34yrs average profile of all films on TV	11
25-34yrs in survey population	14	25-34yrs in total TV audience	9

Source: CAA Film Monitor, 2018, BARB/TechEdge

See notes to Figures 3 and 6.

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 animated children's film *Sherlock Gnomes* and erotic drama *Fifty Shades Freed*. On television, the 35-44 year old film audience showed a greater preference for recent films (all shown on Sky Cinema Premiere) than the other age groups, many of which were titles from familiar franchises.

**Table 6 Films with a significant above-average audience profile in the 35-44 age group, 2018 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
Life of the Party	34	Back to the Future Part II (E4)	34
Duck Duck Goose (UK)	30	Captain Underpants: The First Epic Movie (Sky Cinema Premiere)	34
Sherlock Gnomes (UK)	28	Rio 2 (E4)	32
The Equalizer 2	25	The Hangover Part III (Channel 5)	32
I Feel Pretty	25	Forrest Gump (Sky One)	32
The Commuter (UK)	25	Step Up 4: Miami Heat (E4)	31
Smallfoot	24	CHiPs: Law and Disorder (Sky Cinema Premiere)	30
Show Dogs (UK)	24	Transformers: The Last Knight (Sky Cinema Premiere)	29
Fifty Shades Freed	24	Rocky III (ITV4)	29
Rampage	23	Ghost in the Shell (Sky Cinema Premiere)	29
35-44yrs average profile of all films	16	35-44yrs average profile of all films on TV	14
35-44yrs in survey population	15	35-44yrs in total TV audience	11

Source: CAA Film Monitor, 2018, BARB/TechEdge

See notes to Figures 3 and 6.

Four films appear in the list of in-cinema films which over-index for both the 45-54 age group (Table 7) and the 55+ age group (Table 8) - *Darkest Hour*, *Widows*, *The Children Act* and *Book Club* - three of which are UK titles. Overall, older cinema-goers show a strong preference for British films with six of the 10 films in the 45-54 age group list and eight in the 55+ age group list being UK titles.

The data indicate that 45-54 year olds may have the broadest taste of all groups in terms of cinema-going: the top 10 list for in-cinema titles for this age demographic is the least skewed, with the highest indexing titles *Bohemian Rhapsody* and *Darkest Hour*, attracting less than two in 10 audience members from this group. The top 10 over-indexing films on television for the 45-54 age group are split evenly between more modern films (i.e. made in the previous 10 years) and older titles.

**Table 7 Films with a significant above-average audience profile in the 45-54 age group, 2018 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
Bohemian Rhapsody (UK)	18	Alan Partridge: Alpha Papa (UK) (BBC Two)	40
Darkest Hour (UK)	18	Terminator 2: Judgement Day (ITV)	39
Widows (UK)	17	Scouts Guide to the Zombie Apocalypse (Film4)	37
A Star Is Born	17	Brotherhood (UK) (Film4)	37
The Children Act (UK)	17	The Lord of the Rings: The Two Towers (ITV)	37
Nativity Rocks! (UK)	16	Joy (2015) (Film4)	35
The Predator	16	Poltergeist (2015) (5STAR)	35
I, Tonya	15	The Amazing Spider-Man (ITV)	35
Mamma Mia! Here We Go Again (UK)	15	The Mummy Returns (ITV)	35
Book Club	15	The Lord of the Rings: The Fellowship of the Ring (ITV)	34
45-54yrs average profile of all films	10	45-54yrs average profile of all films on TV	20
45-54yrs in survey population	12	45-54yrs in total TV audience	17

Source: CAA Film Monitor, 2018, BARB/TechEdge

See notes to Figures 3 and 6.

The average age of over-indexing films on television increases substantially for the 55+ age group. The oldest film appearing in previous lists was from 1982 (*Rocky III*, 35-44 age group), whereas the majority of the films in the television list for the 55+ age group were released theatrically before the 1970s. The list features only two films from the current century: *Goldstone* (released in 2016) and the 2004 version of *The Alamo*.

**Table 8 Films with a significant above-average audience profile in the 55+ age group, 2018 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
On Chesil Beach (UK)	68	The Heroes of Telemark (UK) (BBC Four)	87
The Guernsey Literary and Potato Peel Pie Society (UK)	65	The Green Berets (ITV4)	87
Finding Your Feet (UK)	63	Laura (1944) (BBC Two)	87
The Children Act (UK)	54	I Was Monty's Double (UK) (BBC Two)	87
The Post	53	The Desert Fox (BBC Two)	87
Darkest Hour (UK)	53	Call Me Madam (BBC Two)	86
Phantom Thread (UK)	43	The Alamo (2004) (Channel 5)	85
Three Billboards Outside Ebbing, Missouri (UK)	39	Goldstone (BBC Four)	85
Widows (UK)	38	Tobruk (ITV4)	85
Book Club	37	Chisum (ITV4)	84
55+yrs average profile of all films	13	55+yrs average profile of all films on TV	42
55+yrs in survey population	35	55+yrs in total TV audience	54

Source: CAA Film Monitor, 2018, BARB/TechEdge

See notes to Figures 3 and 6.

## FILM PREFERENCES BY GENDER

Tables 9 and 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 2018 – and captured in the CAA Film Monitor – compared with the equivalent for all films transmitted on television. Whilst males slightly over-index in the cinema audience (51%) compared with the UK population, women over-index in the television audience overall (55%), but not for films shown on television where they represent the population (51%).

There were distinct differences in film preferences by gender. As in previous years, films attracting a predominantly female audience, both at the cinema and on television, included comedies and dramas with strong female protagonists alongside family friendly fare (Table 9). The top two titles over-indexing for women at the cinema in 2018 were the US comedy *Book Club*, which explores the impact of reading the erotic novel *Fifty Shades of Grey* on a group of older readers, and *Fifty Shades Freed*, the final film adaptation of the book trilogy. The only two titles across both lists not led by female characters were *Hachi: A Dog's Tale*, a tear-jerker starring Richard Gere, and *Nativity Rocks!*, the fourth instalment of the ongoing *Nativity* series. Males continued to over-index in the audience for action-driven genres both in the cinema and on television (Table 10). One of the few genre outliers across either top-indexing list for males was the comedy *The Diary of a Teenage Girl* shown on Film4, for which just under seven in 10 viewers were male.

Overall, female audiences showed a slightly stronger preference for British films in 2018, with six UK titles across both top-indexing lists compared with four for male audiences.

**Table 9 Films with a significant above-average audience profile amongst females (7yrs+), 2018 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
Book Club	80	Coming Home For Christmas (2013) (Channel 5)	84
Fifty Shades Freed	79	Walking On Sunshine (UK) (Channel 5)	80
Mamma Mia! Here We Go Again (UK)	77	The Parent Trap (1998) (5STAR)	78
Nativity Rocks! (UK)	75	Woman on the Edge (Channel 5)	77
A Simple Favour	71	Locked Away (2010) (Channel 5)	76
I Feel Pretty	69	The Big Wedding (Channel 5)	76
The Spy Who Dumped Me	69	Mamma Mia! (UK) (ITV)	75
Mary Poppins Returns (UK)	68	My Big Fat Greek Wedding 2 (Channel 5)	75
Finding Your Feet (UK)	68	Hachi: A Dog's Tale (Channel 4)	74
A Wrinkle in Time	68	The Devil Wears Prada (Channel 4)	74
Female (7yrs+) average profile of all films	49	Female (7yrs+) average profile of all films on TV	51
Female (7yrs+) in survey population	51	Female (7yrs+) in total TV audience	55

Source: CAA Film Monitor, 2018, BARB/TechEdge

See notes to Figures 3 and 6.

**Table 10 Films with a significant above-average audience profile amongst males (7yrs+), 2018 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
Sicario 2: Soldado	84	The Last Samurai (2003) (5Spike)	73
Tag	77	Transporter 2 (E4)	73
The Predator	74	Waterloo (BBC Two)	72
Den of Thieves	73	A Fistful of Dollars (ITV4)	72
Ant-Man and the Wasp	73	Heartbreak Ridge (ITV4)	71
Venom (UK)	71	Khartoum (UK) (ITV4)	70
Creed II	71	Dumb And Dumber To (Film4)	70
Solo: A Star Wars Story (UK)	70	The Outlaw Josey Wales (ITV4)	70
Pacific Rim: Uprising (UK)	70	Chisum (ITV4)	70
The Equalizer 2	68	The Diary of a Teenage Girl (Film4)	69
Male (7yrs+) average profile of all films	51	Male (7yrs+) average profile of all films on TV	49
Male (7yrs+) in survey population	49	Male (7yrs+) in total TV audience	45

Source: CAA Film Monitor, 2018, BARB/TechEdge

See notes to Figures 3 and 6.

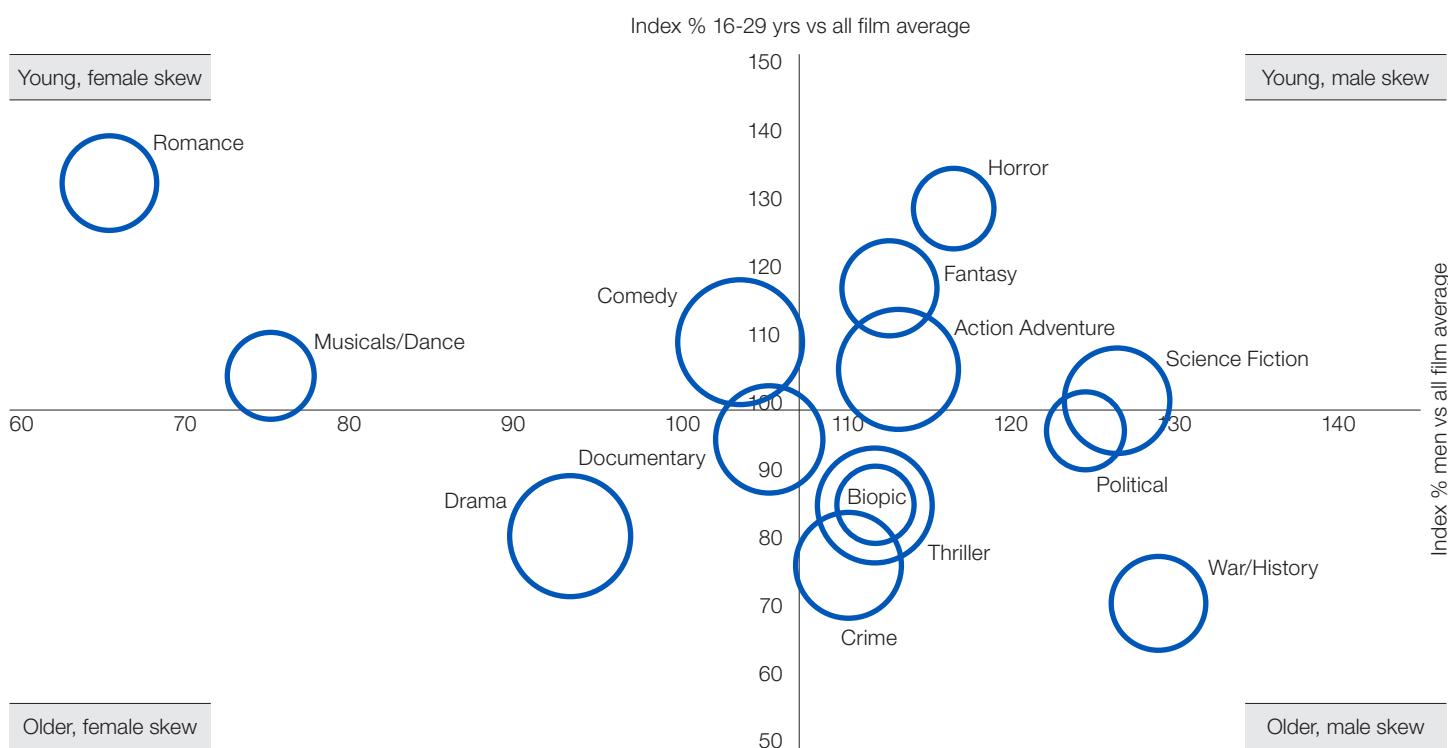
## GENRE PREFERENCES BY AGE AND GENDER

The analysis of preference by age and gender in the previous tables hints at some marked differences in film taste within and between different audience groups. Figure 7 combines these groups along with a measure of reach (size of bubble) to indicate both genre preferences in terms of demographics and overall size of audience. (It should be noted that the genre categories used here differ slightly from the categories assigned to the theatrical market in the first chapter of the Yearbook, Film at the cinema.)

The comedy and action/adventure genres attracted the largest audiences and appear close to the middle of the chart indicating that they appeal equally to all age groups and both genders. The documentary genre is also close to the middle, although the more specific genres such as political and biopic have smaller audiences and tend to skew to older men.

Young audiences have very definite genre tastes with romance far and away the preference of young women whilst young men are most likely to make up the audience for horror films.

**Figure 7 Audience mapping by genre – age and gender, 2018**



Source: Nations and Regions Survey 2019, BFI/YouGov, Base: All UK Online adults (10,497). Size of bubble equals annual genre reach.

Q: Have you watched any of the following genres of films at the cinema, at home or elsewhere over the past 12 months? Please select all that apply.

## FILM PREFERENCES BY SOCIO-ECONOMIC GROUP

Tables 11 and 12 show the top 10 films with the highest average % of group in the total audience by socio-economic grade for all films released in cinemas in 2018 – and captured in the CAA 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 little different to the average total television audience, which skews more to the C2DE socio-economic grade.

ABC1 viewers are significantly more likely to watch critically acclaimed cinema releases compared with C2DE viewers. Critical scores – aggregated by website Metacritic.com and converted into a weighted average out of 100 – for the top 10 over-indexing films at the cinema for the ABC1 audience in 2018 range from 62 for *The Children Act* (adapted from his own novel by Ian McEwan) to 94 for *Lady Bird* (Greta Gerwig's solo directorial debut). This is in contrast to the top 10 in-cinema titles which over-indexed for C2DE viewers, which ranged from a score of 31 for *Fifty Shades Freed* to 69 for the children's television big screen outing *Teen Titans Go! To the Movies*. The same is broadly true for the lists of over-indexing films on television.

ABC1 audiences showed a marked preference for UK films with a total of 10 UK titles appearing across both lists compared with only four UK titles for C2DE audiences.

**Table 11 Films with a significant above-average audience profile amongst ABC1 viewers (7yrs+), 2018 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 Guernsey Literary and Potato Peel Pie Society (UK)	84	The Equalizer (Sky Cinema Greats)	76
Lady Bird	83	American Made (Sky Cinema Premiere)	74
Three Billboards Outside Ebbing, Missouri (UK)	82	Brideshead Revisited (UK) (BBC Two)	71
First Man	80	Truly Madly Deeply (UK) (BBC Two)	71
Darkest Hour (UK)	79	King Lear (2018) (UK) (BBC Two)	70
The Shape of Water	79	The King's Speech (UK) (BBC One)	69
BlacKkKlansman	78	Alan Partridge: Alpha Papa (UK) (BBC Two)	69
The Post	78	An Education (UK) (BBC Four)	68
A Star Is Born	77	Love & Friendship (BBC Two)	68
The Children Act (UK)	76	Captain Underpants: The First Epic Movie (Sky Cinema Premiere)	67
ABC1 (7yrs+) average profile of all films	63	ABC1 (7yrs+) average profile of all films on TV	47
ABC1 (7yrs+) in survey population	54	ABC1 (7yrs+) in total TV audience	46

Source: CAA Film Monitor, 2018, BARB/TechEdge

See notes to Figures 3 and 6.

**Table 12 Films with a significant above-average audience profile amongst C2DE viewers (7yrs+), 2018 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 First Purge	57	The Karate Kid (2010) (Film4)	89
Fifty Shades Freed	56	Jeremiah Johnson (ITV4)	88
Insidious: The Last Key	53	Insidious (Film4)	82
Den of Thieves	50	Jane Got a Gun (Film4)	82
The Commuter (UK)	50	Dracula Untold (UK) (Film4)	82
Life of the Party	50	Sony Smurf Shorts (ITV2)	81
Teen Titans Go! To the Movies	49	Death Wish V: The Face of Death (ITV4)	80
Robin Hood (UK)	48	Rio 2 (E4)	80
Goosebumps 2: Haunted Halloween	47	The Dirty Dozen (UK) (5Spike)	78
Truth or Dare	47	Ransom (ITV4)	78
C2DE (7yrs+) average profile of all films	37	C2DE (7yrs+) average profile of all films on TV	53
C2DE (7yrs+) in survey population	46	C2DE (7yrs+) in total TV audience	54

Source: CAA Film Monitor, 2018, BARB/TechEdge

See notes to Figures 3 and 6.

## 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 2018 – and captured in the CAA 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. As in 2017, English audiences showed the greatest preference for UK films at the cinema while Scottish audiences showed the greatest preference for UK films on television.

As Table 13 shows, four of the top 10 films at the cinema attracting above-average English audiences were UK films, three of which – *On Chesil Beach*, *Phantom Thread* and *The Guernsey Literary and Potato Peel Pie Society* – were independent UK titles. The only UK title to appear in the television list was the independent UK film *The Danish Girl*. Action and drama were the most popular genres for both in-cinema titles and those viewed on television. While dramas with strong elements of romance such as *On Chesil Beach* and *Step Up 4: Miami Heat* were popular across both lists, on television English viewers also favoured dramas with a strong action element such as *Braven* and *Volcano*.

Drama titles were also popular with cinema and television film audiences in Scotland but there was a marked preference for crime dramas such as *BlacKkKlansman* and *Three Billboards Outside Ebbing, Missouri* in the cinema list and a preference for comedy dramas such as *The Devil Wears Prada* and *The Bishop's Wife* in the television list (Table 14). Edinburgh-set musical *Sunshine on Leith*, which appears in the list of over-indexing titles on television for the second consecutive year, was the top indexing film among Scottish viewers across both lists. All four UK titles in the Scottish lists were independent UK films.

In Wales, family friendly titles were the most likely to over-index for both cinema and television audiences, particularly in the form of animations or comedies (Table 15). The most over-indexed title in the cinema list, however, was the romantic drama *A Star Is Born*. On television, the highest indexing films were the romantic comedy *Overboard* and the animation *Happy Feet Two*. Of the four UK titles in the Welsh lists, two – *Early Man* and *Show Dogs* – were independent UK films.

**Table 13 Films with a significant above-average audience profile amongst 7+ age group in England, 2018 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
On Chesil Beach (UK)	92	Step Up 4: Miami Heat (E4)	97
Den of Thieves	91	Hop (Sky Cinema Family)	97
Phantom Thread (UK)	91	Rush Hour (ITV4)	97
Rampage	91	Braven (Sky Cinema Premiere)	96
Ready Player One (UK)	90	Die Hard with a Vengeance (BBC One)	95
The Guernsey Literary and Potato Peel Pie Society (UK)	89	The Danish Girl (UK) (ITV)	95
Creed II	88	Night at the Museum: Secret of the Tomb (Film4)	95
Ocean's 8	88	Tomorrowland: A World Beyond (BBC Two)	95
The Post	88	Rocky III (ITV)	94
Aquaman	88	Volcano (E4)	94
England (7yrs+) average profile of all films	84	England (7yrs+) average profile of all films on TV	84
England (7yrs+) in survey population	83	England (7yrs+) in total TV audience	83

Source: CAA Film Monitor, 2018, BARB/TechEdge

See notes to Figures 3 and 6.

**Table 14 Films with a significant above-average audience profile amongst 7+ age group in Scotland, 2018 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
BlacKkKlansman	18	Sunshine on Leith (UK) (Channel 4)	26
Three Billboards Outside Ebbing, Missouri (UK)	16	Tropic Thunder (BBC One)	24
The Spy Who Dumped Me	15	The Devil Wears Prada (Film4)	22
Sicario 2: Soldado	15	Mystery Road (BBC Two)	22
Maze Runner: The Death Cure	15	The Bishop's Wife (BBC Four)	22
Widows (UK)	15	Having You (UK) (BBC One)	20
Love, Simon	15	Miracle on 34th Street (1947) (Channel 4)	19
Life of the Party	14	Cheaper By The Dozen 2 (Channel 4)	19
The House with a Clock in Its Walls	14	The Best of Me (Channel 5)	19
Hereditary	14	Die Hard 2: Die Harder (E4)	19
Scotland (7yrs+) average profile of all films	9	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, 2018, BARB/TechEdge

See notes to Figures 3 and 6.

**Table 15 Films with a significant above-average audience profile amongst 7+ age group in Wales, 2018 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
A Star Is Born	16	Overboard (ITV)	21
Early Man (UK)	15	Happy Feet Two (ITV)	21
Bohemian Rhapsody (UK)	14	Rocky II (ITV)	17
Smallfoot	14	Diary of a Wimpy Kid: The Long Haul (Sky Cinema Premiere)	17
Show Dogs (UK)	13	The Goonies (1985) (5STAR)	16
Tag	13	On Her Majesty's Secret Service (UK) (ITV4)	15
Adrift	12	The Witch (Film4)	13
Coco	12	Daddy's Home (Film4)	13
Hotel Transylvania 3: A Monster Vacation	12	The Net (E4)	13
Ant-Man and the Wasp	11	The Mummy (ITV)	13
Wales (7yrs+) average profile of all films	8	Wales (7yrs+) average profile of all films on TV	5
Wales (7yrs+) in survey population	9	Wales (7yrs+) in total TV audience	5

Source: CAA Film Monitor, 2018, BARB/TechEdge

See notes to Figures 3 and 6.



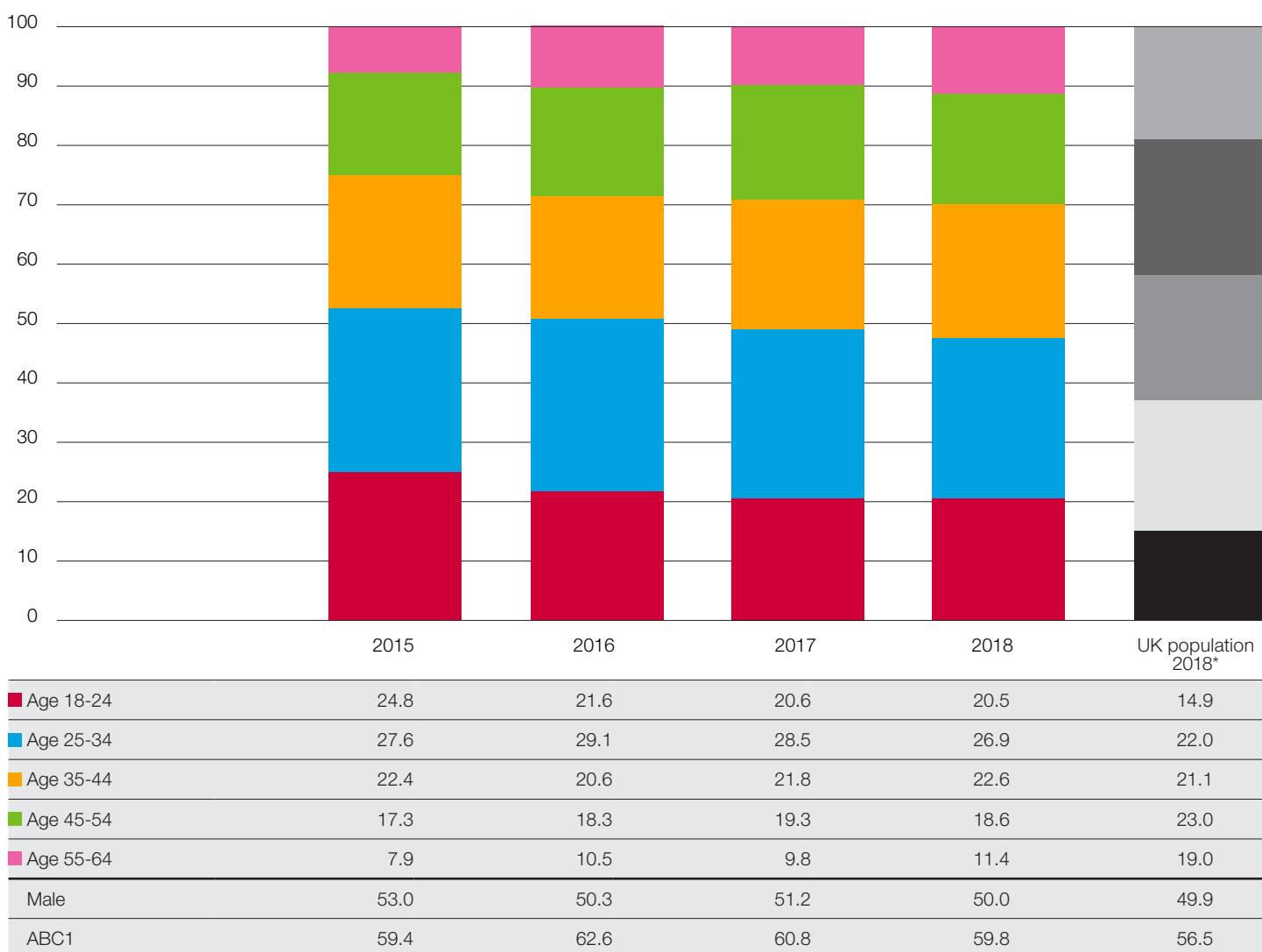
## SUBSCRIPTION VIDEO ON DEMAND

There has been a rapid take-up of SVoD services in the UK in recent years, with over 12 million households having access to one or more of these services in 2018 (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. As Figure 8 demonstrates, 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 2018, users aged 18-34 made up 47% of the SVoD audience compared with 37% for the UK as a whole.

In terms of socio-economic status, the overall SVoD audience skews slightly more affluent than the general population. The chart does show, however, that women have increased their adoption of SVoD since 2015 when they made up 47% of the SVoD audience; in 2018, the overall audience was gender balanced.

**Figure 8 UK SVoD audience profile by age, 2015-2018**

% of group in audience



Source: Ampere Analysis, Consumer Surveys 2015-2018, UK adults (18-64). Base: 2015 (330), 2016 (788), 2017 (2,244), 2018 (2,000)

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

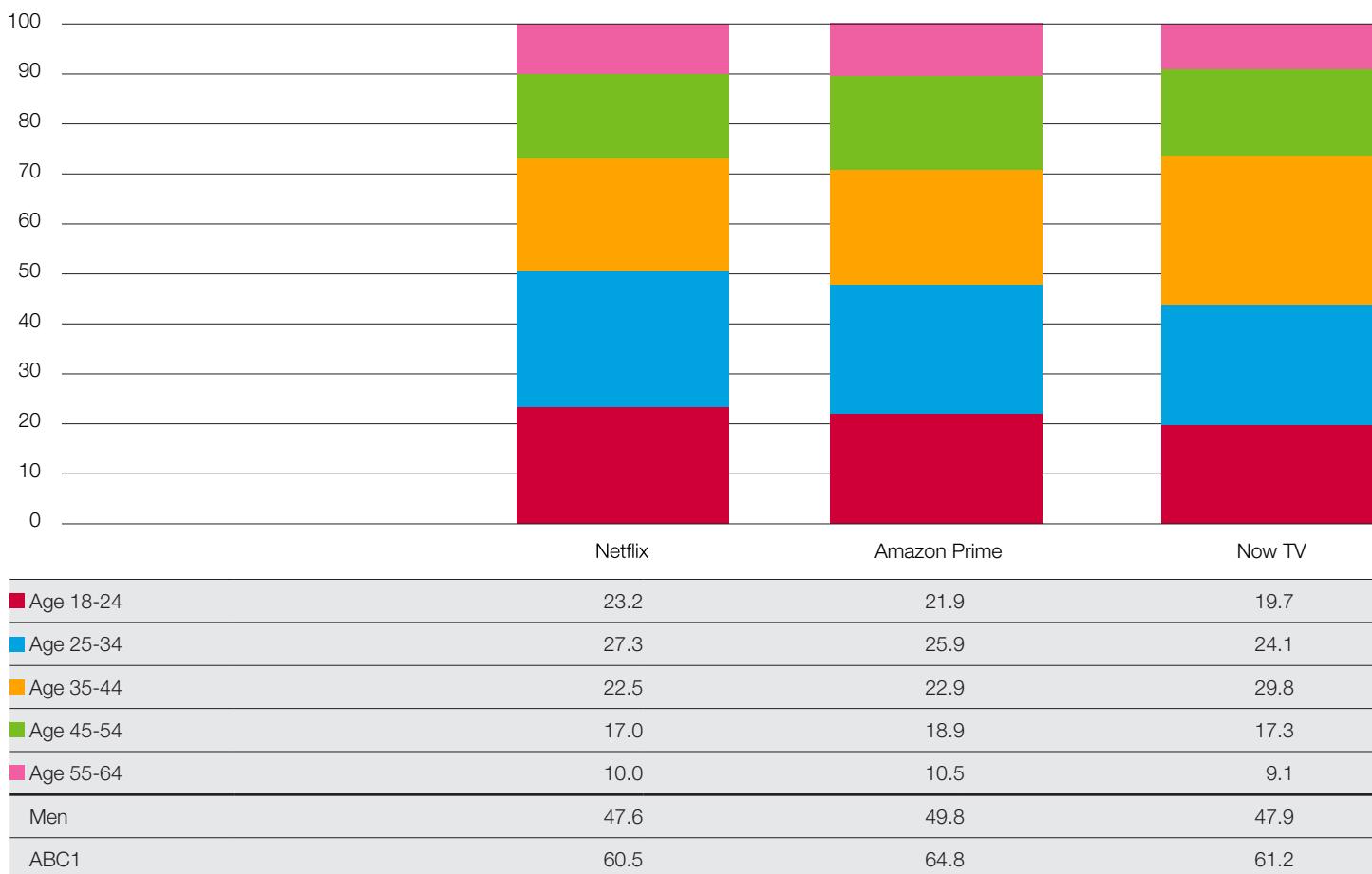
\* UK population based on sample breakdown weighted to represent 18-64 year olds.

## USER PROFILE FOR SELECTED SVOD SERVICES

Whilst there is a growing number of subscription on-demand and streaming services available to UK audiences, the market is dominated by three main providers, Netflix, Amazon Prime Video and Now TV. (Information on reach for these services is shown in the Digital video section of the Home Entertainment chapter.) The audience profile of users is fairly similar for all three services, with only small differences between them (Figure 9). Netflix has the youngest profile with 50.5% of its users aged under 35 and, although its user base still skews to the more affluent socio-economic grades, has the smallest share of ABC1 users of the top three SVoD providers.

**Figure 9 User profile of selected SVoD services in the UK by age, 2018**

% of group in audience



Source: Ampere Analysis, Consumer Survey 2018, UK adults (18-64). Base: (2,000)

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

Amazon Prime Video only includes subscribers who use the platform to watch videos, as opposed to those who solely subscribe to Amazon Prime for other non-video services.

## FILM PREFERENCES ON SVOD PLATFORMS

Tables 16-20 show the top 10 titles with the highest average % of group in the total audience by gender and age group for films available to stream on UK SVoD services as a whole in 2018. The 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 of each demographic.

Differences in preference by gender for films streamed through SVoD platforms mirror those of audiences for films shown at the cinema or on television. 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. Interestingly, according to GfK data, the high-school set romantic comedy, *The Kissing Booth* (a Netflix production touted by the platform as one of its most watched originals in 2018) recorded no male audience members at all in the UK.

**Table 16 Top 10 films with a significant above-average audience amongst females, films on SVoD, 2018**

Title	Females as % of audience
The Kissing Booth*	100
Bridget Jones's Baby (UK)	97
The Princess Switch*	95
To All the Boys I Loved Before*	93
Nativity! (UK)	90
The Holiday	90
The Secret Life of Pets	89
The Girl on the Train	87
Bad Moms	87
Bridesmaids	87
Average % of SVoD audience for film	52

Source: GfK SVoD Weekly Consumption Tracker, 2018. All adults (18+) who watch SVoD at least once every two weeks. Base (10,274)

Notes: Titles in italics have small base sizes. \* Indicates title is a Netflix original.

**Table 17 Top 10 films with a significant above-average audience amongst males, films on SVoD, 2018**

Title	Males as % of audience
Star Trek Into Darkness	72
Rogue One: A Star Wars Story (UK)	63
Outlaw King* (UK)	63
Annihilation* (UK)	63
The Hunger Games: Catching Fire	61
Iron Man 3	61
Batman v Superman: Dawn of Justice	59
Star Wars: Episode VII - The Force Awakens (UK)	59
Captain America: The Winter Soldier	56
<i>The Commuter</i> (UK)	52
Average % of SVoD audience for film	48

Source: GfK SVoD Weekly Consumption Tracker, 2018. All adults (18+) who watch SVoD at least once every two weeks. Base (10,274)

Notes: Titles in italics have small base sizes. \* Indicates title is a Netflix original.

Reflecting the average age profile for SVoD services as a whole, Tables 18-20 show that most films generally attract a high proportion of those in the 18-34 age group. Preference by age also shows that younger audiences consume a greater number of Netflix original movies than those aged 35 or over, whose viewing choice is largely dominated by familiar titles. Interestingly, the Netflix originals over-indexing for 18-34 year olds were all romantic comedies, a key genre in the platform's commissioning strategy. Sequels to all three of the originals in the list – *To All the Boys I Loved Before*, *The Kissing Booth* and *The Princess Switch* – are scheduled for release on the platform in either 2019 or 2020. (All three titles also feature in the top 10 over-indexing films for female viewers.) The most viewed film on streaming platforms in 2018 overall, the Netflix original *Bright*, does not feature in any of these lists, indicating that it appealed across all groups.

Both older age groups showed a preference for UK films, with five UK titles in the top 10 for 35-54 year olds and four in the top 10 for the 55+ age group. The inclusion of the independent UK film *Paddington 2* in the 55+ age group top 10 is an interesting example of the ability of SVoD platforms to attract a different profile of audience from that delivered by a cinema release: 30% of the SVoD audience for *Paddington 2* was aged 55+, compared to 24% of its cinema audience in 2017.

**Table 18 Top 10 films with a significant above-average audience in the 18-34 age group, films on SVoD, 2018**

Title	18-34s as % of audience
To All the Boys I Loved Before*	91
The Kissing Booth*	81
<i>White Chicks</i>	75
Shrek	74
The Secret Life of Pets	70
Captain America: The Winter Soldier	69
The Princess Switch*	68
<i>Iron Man 3</i>	65
Fast & Furious 6 (UK)	64
Step Brothers	64
Average % of SVoD audience for film	49

Source: GfK SVoD Weekly Consumption Tracker, 2018. All adults (18+) who watch SVoD at least once every two weeks. Base (10,274)

Notes: Titles in italics have small base sizes. \* Indicates title is a Netflix original.

**Table 19 Top 10 films with a significant above-average audience in the 35-54 age group, films on SVoD, 2018**

Title	35-54s as % of audience
Jaws	74
Rogue One: A Star Wars Story (UK)	70
Moana	64
<i>Jack Ryan: Shadow Recruit</i>	62
The Lord of the Rings: The Fellowship of the Ring	60
The Girl on the Train	60
Charlie and the Chocolate Factory (UK)	58
Bridget Jones's Baby (UK)	58
Annihilation* (UK)	58
Nativity! (UK)	57
Average % of SVoD audience for film	34

Source: GfK SVoD Weekly Consumption Tracker, 2018. All adults (18+) who watch SVoD at least once every two weeks. Base (10,274)

Notes: Titles in italics have small base sizes. \* Indicates title is a Netflix original.

**Table 20 Top 10 films with a significant above-average audience in the 55+ age group, films on SVoD, 2018**

Title	55+s as % of audience
Star Trek Into Darkness	36
Outlaw King* (UK)	34
<i>The Commuter</i> (UK)	33
Star Wars: Episode VII - The Force Awakens (UK)	31
Paddington 2 (UK)	30
<i>The Circle</i>	30
<i>John Wick</i>	30
La La Land	28
<i>Jack Ryan: Shadow Recruit</i>	24
The Girl on the Train	23
Average % of SVoD audience for film	17

Source: GfK SVoD Weekly Consumption Tracker, 2018. All adults (18+) who watch SVoD at least once every two weeks. Base (10,274)

Notes: Titles in italics have small base sizes. \* Indicates title is a Netflix original.



Image: *La La Land* courtesy of Lionsgate Films

## AUDIENCE PROFILE COMPARATIVE ANALYSIS

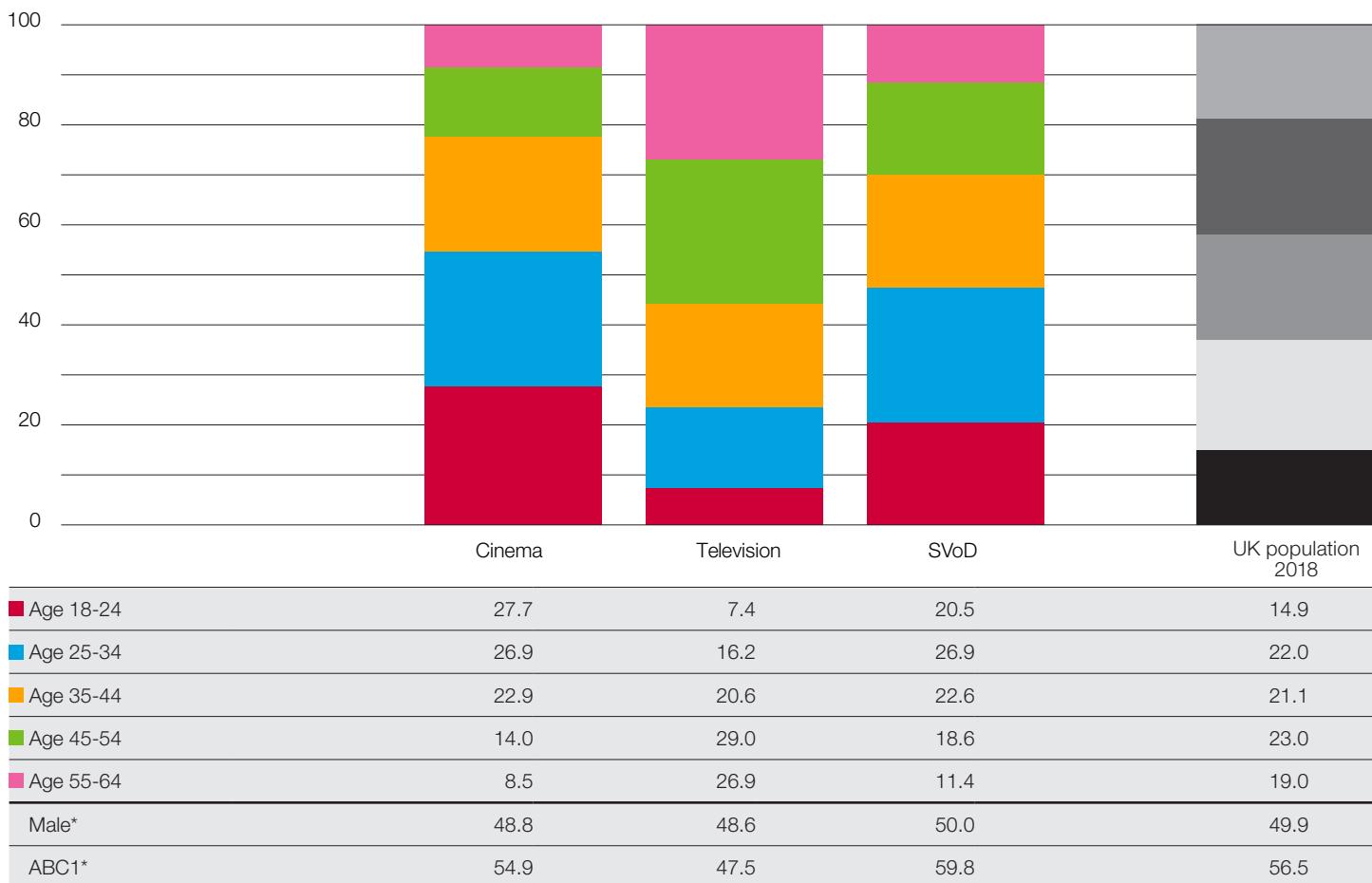
This chapter has focused on comparing demographic profiles and preferences of the audience for the three most used platforms that show film. However, due to the different methodologies used to collect the data and the different sampling criteria, it is difficult to draw any real comparisons between them. Figure 10 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 are for all content watched on these platforms, including television series and non-feature documentaries, so is not exclusively based on a 'film-only' audience.

Cinema delivers the youngest skewing audience profile, with 28% aged between 18-24 and each older age bracket steadily decreasing to just 8.5% aged between 55-64. The age profile for television is almost a mirror image of this, with 27% of the audience aged 55-64, increasing to 29% aged 45-54, and only 7% aged 18-24. This does not mean that young audiences are necessarily abandoning the small screen experience, as they over-index in the SVoD audience and access these services in the main by using a television set.

In terms of gender, all three platforms attract an audience not substantially different from the UK population as a whole, and which splits broadly equally between males and females. In socio-economic terms, television under-represents ABC1 viewers, in contrast to SVoD which attracts a more upmarket audience.

**Figure 10 Comparative UK audience profiles: cinema, television and SVoD, 2018**

% of group in audience



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

Notes: CAA data based on all films released in 2018 and captured in the CAA's Film Monitor research. Titles (88), Base (19,270).

BARB/TechEdge data filtered on all titles transmitted on all BARB subscribed channels in 2018. Titles (7,323), UK adults (18-64), Base (6,668).

Ampere Analysis Consumer Survey 2018, Audience profile for all UK SVoD services. UK adults (18-64), Base (2,000).

\* Based on adults aged 18-64.



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