



# FILMS ON PHYSICAL VIDEO

# CONTENTS

03	Facts in focus
04	Physical video
04	Film in the physical video retail market
10	Film in the physical video rental market

# FACTS IN FOCUS

Despite an increase in home leisure time in 2020, the market for film on physical video continued to decline: the value of sales decreased by 19% compared with 2019 while the value of rentals decreased by 26%. In 2020, non-digital feature film video sales and rentals in the UK generated £299 million, down from £370 million in 2019.

- ▶ The value of sales for all categories of video on physical media in 2020 was £387 million; sales of feature film on video accounted for £282 million.
- ▶ There were 38 million sales of all categories of video on physical media (48 million in 2019), with feature film accounting for 32 million sales.
- ▶ Film accounted for 82.5% of the volume of the physical sell-through market and 73% of the value. UK films accounted for around 35% of the volume of all films sold on video and 47% of the value.
- ▶ The most popular film purchase on physical video in 2020 was *Downton Abbey*; the most popular genre was action/adventure.
- ▶ The physical video rental market in 2020 was worth £17 million.

# Film on physical video

## **Physical video**

‘Video’ is used in this section as the generic description of all physical video, including DVD, Blu-ray and other physical formats, in line with the definition used by BASE, the British Association for Screen Entertainment; it does not include downloads which are discussed in the ‘Film on digital video’ chapter.

## **Film in the physical video retail market**

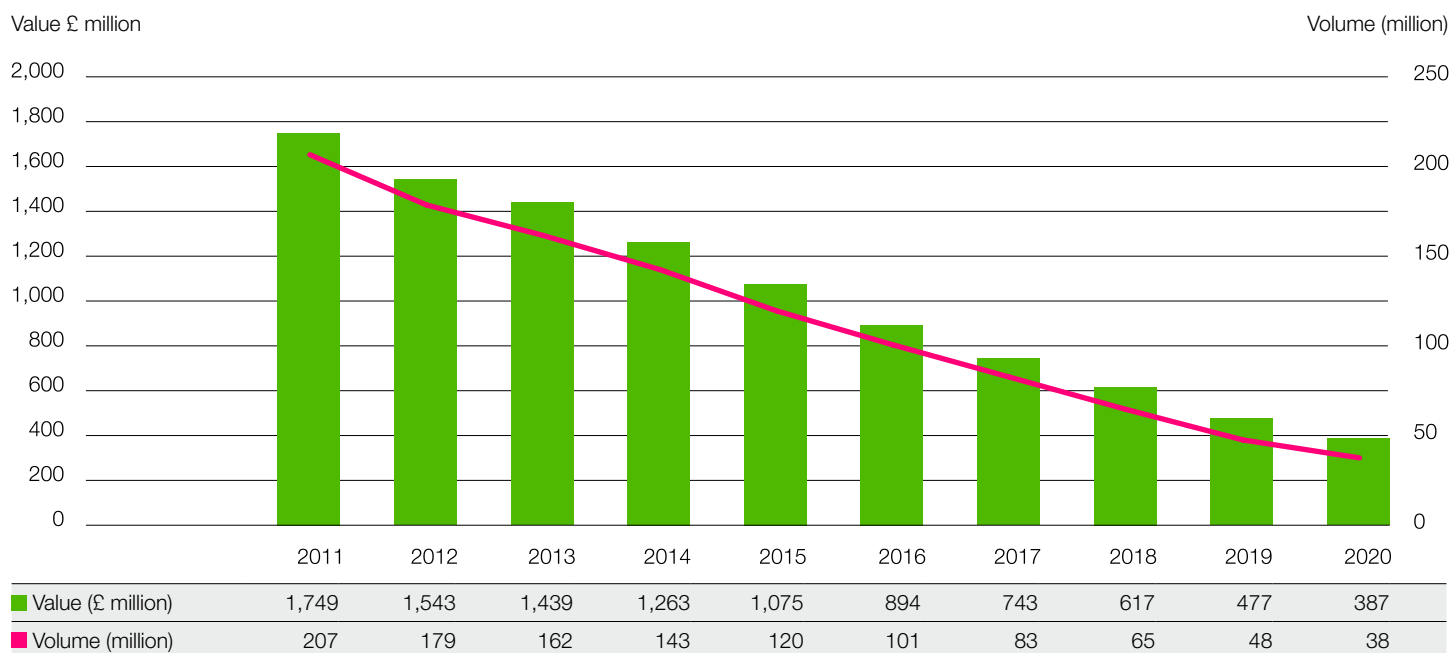
As Figure 1 shows, the value and volume of physical video sales, in all categories, in the UK have declined each year between 2011 and 2020. The value of physical video sales in the UK decreased by 82% over the period, while the volume of sales decreased by 78%.

Unlike the digital video market, which saw significant growth in 2020, due in part to the pandemic-related

restrictions on out-of-home activities, the retail market for physical video saw no uptick from the increased in-home leisure time available to most of the UK population in the year. In 2020, 38 million videos were sold in the UK (down 21% compared with 2019) with a total market value of £387 million (down 19% compared with 2019).

DVDs accounted for the majority of physical video sales in 2020 (81% by volume and 71% by value). While the DVD has remained the dominant format for physical video sales, its share of the market has contracted over the period. The share of the market associated with the Blu-ray format increased from 7% of all units sold and 13% of total value in 2011 to 19% of all units sold and 29% of total value in 2020. While overall sales have declined, Blu-ray has become the more resilient format: in 2020 the value of Blu-ray sales decreased by 13% compared with 2019 (down from £127 million to £111 million) while the value of DVD sales decreased by 21% (down from £350 million to £276 million).

**Figure 1 Retail video sales (all categories), 2011-2020**



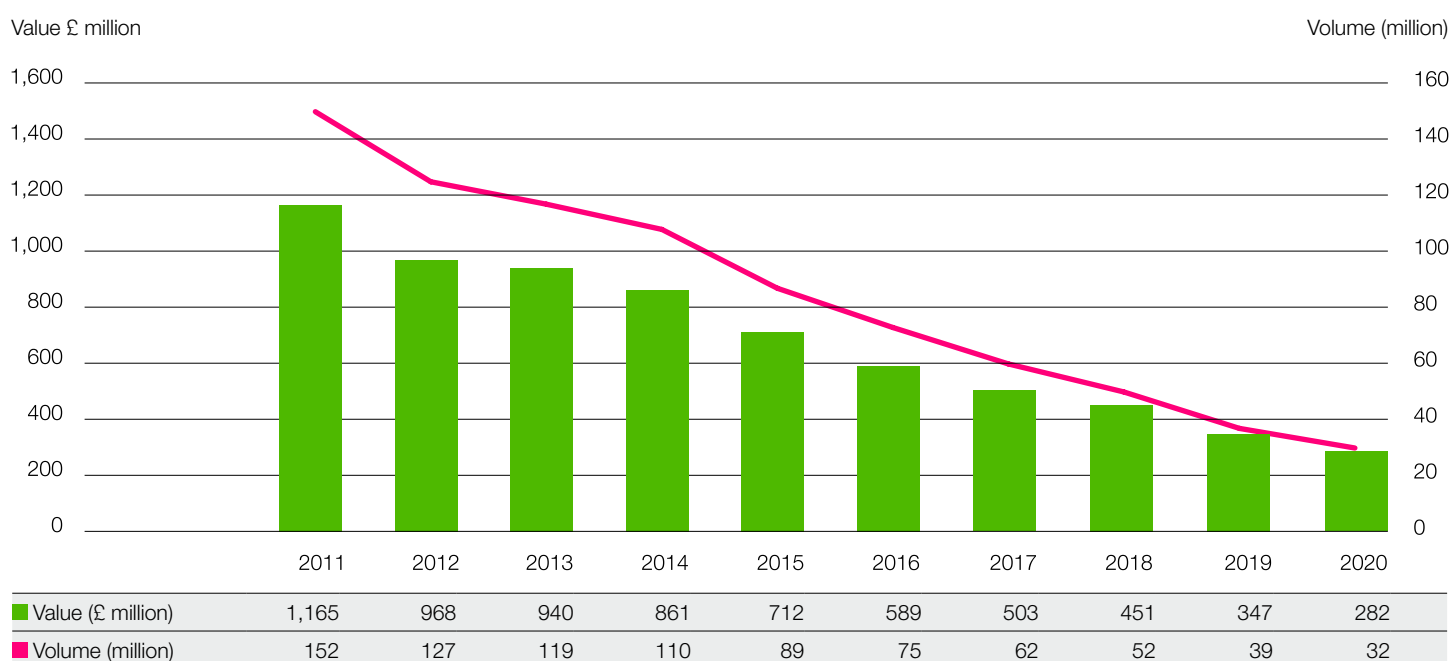
Source: Omdia

Note: Data in this table includes all categories of retail video, not only film.

Feature film represented approximately 73% of the physical sell-through market by value (£282 million) and 82.5% by volume (31.5 million units) in 2020. We estimate that UK films accounted for around 35% of sales by value (down from 40% in 2019) and 37% of sales by volume (the same as in 2019).

As Figure 2 shows, the trend for sales of film on physical video between 2011 and 2020 has mirrored that of the overall physical sell-through market. The value of the retail market for film on physical video in the UK decreased by 76% over the period, while the volume of sales decreased by 79%. Despite the increase in home leisure time available to most film audiences during the year, the value of sales in 2020 were down 19% compared with 2019, while the number of units sold fell by 18%.

**Figure 2 Film on physical video retail sales, 2011-2020**



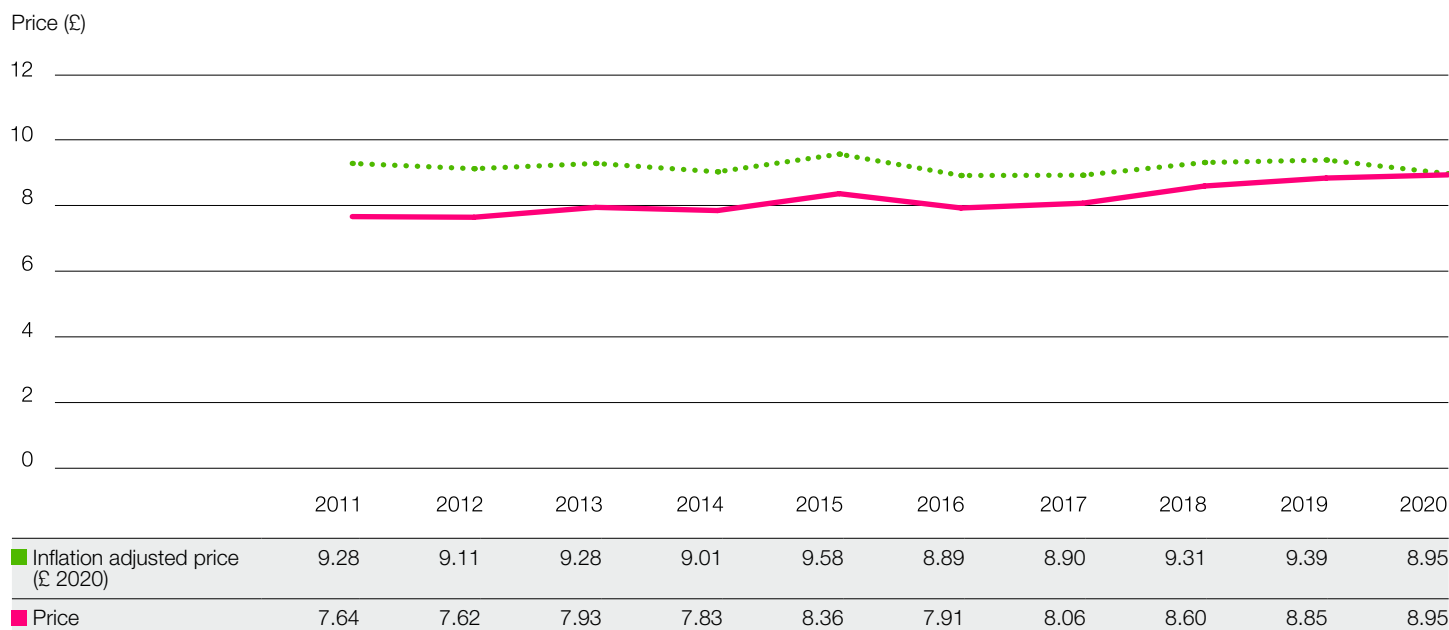
Source: Omdia, BFI RSU analysis of Official Charts Company data

Note: Includes some feature films which would be classified as 'children's videos' in Official Charts Company data.



Figure 3 shows the average unit price for film on physical video formats between 2011 and 2020. When adjusted for inflation, the average cost is fairly consistent, with the average unit price for most years falling between £8.90 and £9.40 when expressed in 2020 pounds.

**Figure 3 Average retail price of film per unit, 2011-2020**



Source: Omdia, BFI RSU analysis of Official Charts Company data, Her Majesty's Treasury

Notes:

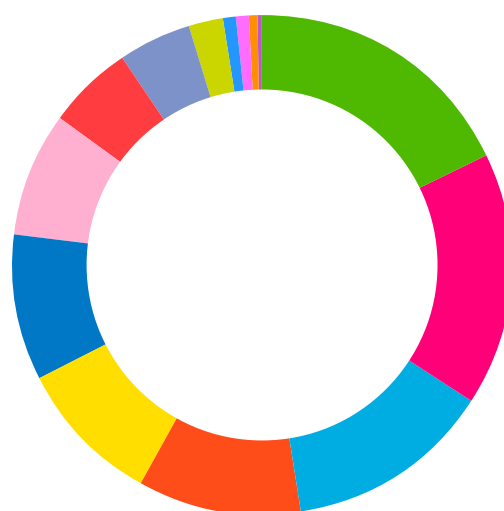
Includes some feature films that would be classified as 'children's videos' in Official Charts Company data.

The deflator used to calculate real values is the UK whole economy deflator, which can be found at <https://www.gov.uk/government/statistics/gdp-deflators-at-market-prices-and-money-gdp-september-2021-quarterly-national-accounts>.

Figure 4 shows that the most popular genre for films sold on physical video in 2020 was action/adventure, which accounted for 18% of the market (20% in 2019), followed by drama with 16% and children's animated films with 13%. (It should be noted that these categories, as defined by BASE, differ from the genre categories assigned to the theatrical market by the BFI Research and Statistics Unit in other chapters of this Yearbook.)

**Figure 4 Sales of film on physical video formats by genre, 2020**

Genre	%
Action/adventure	18.0
Drama	16.2
Children's animated	13.4
Sci-fi	10.6
Comedy	9.5
Child/Family	9.3
Horror	8.1
Thriller	5.6
War	4.7
Musical	2.3
Documentary	0.8
Western	0.7
Anime	0.7
Adult	0.1
Other	<0.1
Bollywood	<0.1



Source: Official Charts Company, BASE

Note: These shares are based on the number of physical units sold.



Image: *Downton Abbey* © 2019 Focus Features LLC. All rights reserved. Courtesy of Universal Studios Licensing LLC

Table 1 shows the top 10 best-selling films on physical video in 2020. The list is headed by *Downton Abbey*, one of eight titles released at the UK and Republic of Ireland box office in 2019, and the first UK independent film to top the chart since *Paddington* in 2015. The remainder of the list is made up of 2020 theatrical releases, including the year's top box office earner, *1917*.

In total, four of the top 10 titles are UK qualifying films. In addition to *Downton Abbey*, these include the US studio-backed productions *Star Wars: The Rise of Skywalker*, *1917* and *Maleficent: Mistress of Evil*.

**Table 1 Top 10 best-selling films on physical video formats, 2020**

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	<i>Downton Abbey</i>	UK	2019	Universal
2	<i>Star Wars: The Rise of Skywalker</i>	UK/USA	2019	Walt Disney
3	<i>Joker</i>	USA/Can	2019	Warner Bros
4	<i>Frozen 2</i>	USA	2019	Walt Disney
5	<i>1917</i>	UK/USA	2020	Entertainment One
6	<i>Jumanji: The Next Level</i>	USA	2019	Sony
7	<i>Maleficent: Mistress of Evil</i>	UK/USA	2019	Walt Disney
8	<i>Terminator: Dark Fate</i>	USA/Can/Aus	2019	20th Century Fox
9	<i>Onward</i>	USA	2020	Walt Disney
10	<i>Knives Out</i>	USA	2019	Lionsgate

Source: Official Charts Company, BFI RSU

Note: This ranking is based on the number of physical units sold. It may differ from other publicly available lists which may incorporate digital downloads or be based on revenue.

The top 10 best-selling UK qualifying films on physical video in 2020 include four titles which also appear in the overall top 10 list, including the year's most popular film on physical video, *Downton Abbey* (Table 2). Six of the top 10 UK qualifying titles were released theatrically in the UK and Republic of Ireland in 2019, while the remainder were released in 2020. Three of the titles (*Downton Abbey*, *The Gentlemen* and *Judy*) are UK independent films.

**Table 2 Top 10 best-selling UK qualifying films on physical video formats, 2020**

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Downton Abbey	UK	2019	Universal
2	Star Wars: The Rise of Skywalker	UK/USA	2019	Walt Disney
3	1917	UK/USA	2020	Entertainment One
4	Maleficent: Mistress of Evil	UK/USA	2019	Walt Disney
5	The Gentlemen	UK/USA	2020	Entertainment in Video
6	Dolittle	UK/USA	2020	Universal
7	The Lion King	UK/USA	2019	Walt Disney
8	Tenet	UK/USA	2020	Warner Bros
9	Last Christmas	UK/USA	2019	Universal
10	Judy	UK	2019	Pathé

Source: Official Charts Company, BFI RSU

See note to Table 1

Three of the top 10 best-selling UK independent films on physical video in 2020 also appear in the top 10 list of UK qualifying films (Table 3). Headed by the year's overall top-selling title, *Downton Abbey*, the list features six films released theatrically in the UK and Republic of Ireland in 2019 and four titles released in 2020. The top two films, *Downton Abbey* and *The Gentlemen* were respectively the highest grossing UK independent film releases of 2019 and 2020.

Two of the titles, *Angel Has Fallen* and *Fisherman's Friends*, feature in this list for a second consecutive year.

**Table 3 Top 10 best-selling UK independent films on physical video formats, 2020**

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Downton Abbey	UK	2019	Universal
2	The Gentlemen	UK/USA <sup>#</sup>	2020	Entertainment in Video
3	Judy	UK	2019	Pathé
4	Angel Has Fallen	UK/USA <sup>#</sup>	2019	Lionsgate
5	Yesterday	UK	2019	Universal
6	A Shaun the Sheep Movie: Farmageddon	UK	2019	StudioCanal
7	Military Wives	UK	2020	Lionsgate
8	Fisherman's Friends	UK	2019	Entertainment in Video
9	Emma	UK	2020	Universal
10	The Personal History of David Copperfield	UK/USA <sup>#</sup>	2020	Lionsgate

Source: Official Charts Company, BFI RSU

See note to Table 1.

<sup>#</sup> Film made with independent (non-studio) US support or with the independent arm of a US studio.



The most popular documentary feature on physical video in 2020 was the biographical film *Finding Jack Charlton* (Table 4). The portrait of the footballer-turned-manager is one of four sports documentaries in the 2020 top 10 list, alongside *The Three Kings*, a film about three of Scotland's greatest football managers, *Diego Maradona*, a biography of the celebrated Argentinian footballer, and *Free Solo*, the Oscar® winning film chronicling the first-ever ropeless ascent of the el Capitan peak in Yosemite National Park by American climber Alex Honnold. The list also includes four war-related documentaries, headed by the 2018 and 2019 top earning documentary film on physical video, *They Shall Not Grow Old*, Peter Jackson's homage to the troops of the First World War.

In addition to *They Shall Not Grow Old*, three other top 10 titles have appeared in this list in previous years: *Apollo 11*, *Diego Maradona* and *Free Solo* all featured in the top 10 of best-selling documentary films on physical video in 2019.

**Table 4 Top 10 best-selling documentary films on physical video formats, 2020**

Rank	Title	Country of origin	Year of theatrical release*	Distributor
1	Finding Jack Charlton	UK/Ire	2020	Noah/Spirit Entertainment
2	Apollo 11	USA	2019	Dogwoof
3	They Shall Not Grow Old	UK	2018	Warner Bros
4	Made in Auschwitz	Deu/Isr	2020 <sup>#</sup>	Signature Entertainment
5	The Three Kings	UK	2020	Spirit Entertainment
6	Diego Maradona	UK	2019	Altitude/Spirit Entertainment
7	Battle of Britain: Empty Skies	UK	2020 <sup>#</sup>	Reel2Reel
8	Free Solo	USA	2018	Dogwoof
9	Audrey	UK	2020 <sup>#</sup>	Universal
10	VE Day: Forever in Their Debt	UK	2020 <sup>#</sup>	Reel2Reel

Source: Official Charts Company, BFI RSU

See note to Table 1.

\* Year of theatrical release here indicates when a title was first released theatrically in the UK.

<sup>#</sup> Title released straight to video.

The best-selling foreign language film on physical video in 2020 was South Korean director Bong Joon-ho's black comedy *Parasite*. The multi-Oscar® and BAFTA winning title was the highest grossing foreign language film at the UK and Republic of Ireland box office in 2020 and currently ranks as the territory's all-time top earning foreign language film release. It is one of seven titles in the 2020 physical video top 10 from Asian countries. For the first time since the 2013 top 10, the list features no titles from the Japanese animation house Studio Ghibli.

**Table 5 Top 10 best-selling foreign language films on physical video formats, 2020**

Rank	Title	Country of origin	Year of theatrical release*	Distributor
1	Parasite	Kor	2020	Curzon Artificial Eye
2	Weathering with You	Jpn	2020	Anime Limited
3	Mulan: Legendary Warrior	Chn	2010 <sup>#</sup>	Cine Asia
4	Train to Busan Presents: Peninsula	Kor	2020	StudioCanal
5	The Hunt for Vlad the Impaler	Tur	2020 <sup>#</sup>	4Digital Media
6	Train to Busan	Kor	2016	StudioCanal
7	Skyfire	Chn	2020 <sup>#</sup>	Patriot Films
8	Portrait of a Lady on Fire	Fra	2020	Curzon Artificial Eye
9	Akira	Jpn	1991	Manga Entertainment
10	The Wolf's Call	Fra	2019	Altitude/Spirit Entertainment

Source: Official Charts Company, BFI RSU

Notes:

Films are labelled as 'foreign language' if their original language was not English, regardless of whether the option to view the film dubbed in English is available on the physical video release.

See note to Table 1.

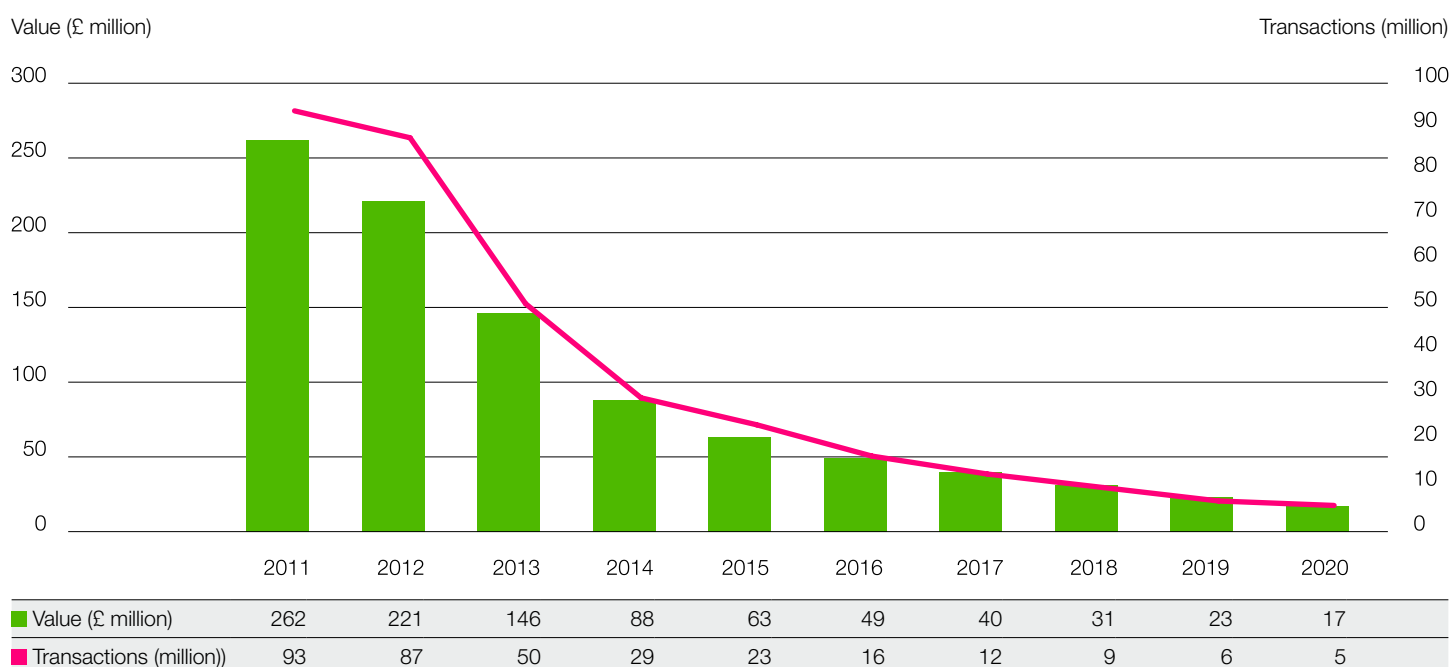
\* Year of theatrical release here indicates when a title was first released theatrically in the UK.

<sup>#</sup> Title released straight to video.

## Film in the physical video rental market

As Figure 5 shows, revenues from rentals in 2020 (£27 million) represent less than 7% of the market's value in 2011 (£262 million), while the volume of transactions in 2020 (five million) represents a drop in sales of 95% compared with 2011 (93 million).

**Figure 5 Film on physical video rentals, 2011-2020**



Source: Omdia



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