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Film
Forever



**HOME
ENTERTAINMENT**

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Facts in focus

VALUE OF FILM ON PHYSICAL VIDEO

Sales in 2018



Down 10% on 2017

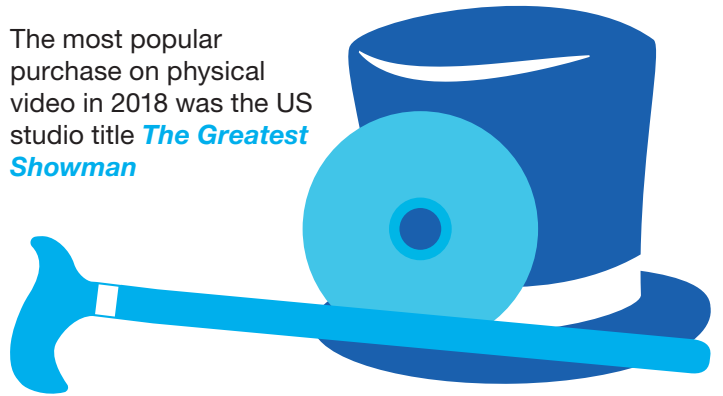
Rentals in 2018



Down 19% on 2017

TOP FILM ON DVD AND BLU-RAY

The most popular purchase on physical video in 2018 was the US studio title *The Greatest Showman*



VALUE OF DIGITAL VIDEO

Up 17% on 2017

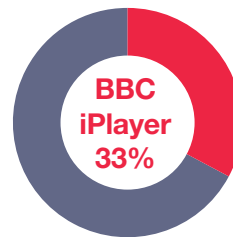


Subscription Video on Demand (SVoD), Transactional Video on Demand (TVoD) rental and TVoD retail (Electronic Sell Through - EST)

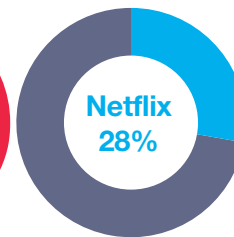
DIGITAL VIDEO PLATFORMS

% reach (UK adults 16+) of the UK's top VoD services in 2018

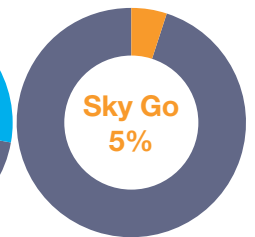
Top free/advert supported platform



Top OTT SVoD platform



Top pay TV platform



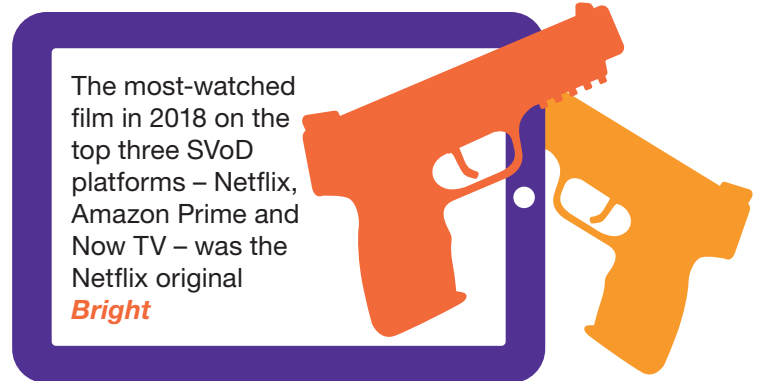
WHAT AUDIENCES WATCH ON SVOD



UK SVoD subscribers spend

- 24% of their viewing time watching films and
- 76% watching TV programmes

WHAT AUDIENCES WATCH ON SVOD



The most-watched film in 2018 on the top three SVoD platforms – Netflix, Amazon Prime and Now TV – was the Netflix original *Bright*

FILM ON TELEVISION

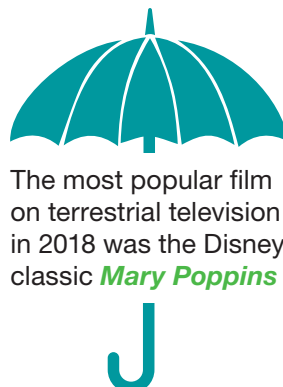
The value of feature film to UK broadcasters in 2018 was **£894 million**

Of which **£134 million** was attributable to UK films

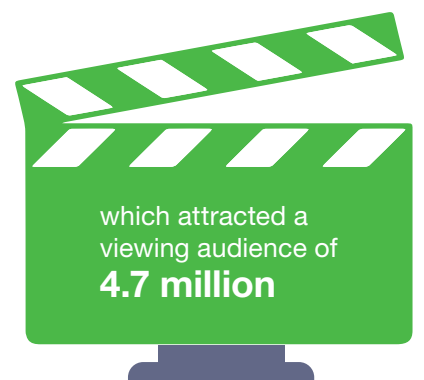


In total, there were **2.3 billion** viewings of film on UK television in the year

TOP FILM ON TELEVISION



The most popular film on terrestrial television in 2018 was the Disney classic *Mary Poppins*



which attracted a viewing audience of **4.7 million**

HOME ENTERTAINMENT

FILM ON PHYSICAL VIDEO

The advent of streaming services has revolutionised the home entertainment market in recent years and provided audiences with far greater choice in how and where they can access feature film content. However, despite increasing competition from digital video and a decade plus of falling revenues, physical video remains an important element of the film value chain, illustrating that there is still an audience for film that appreciates physical ownership.

'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 digital video section below.

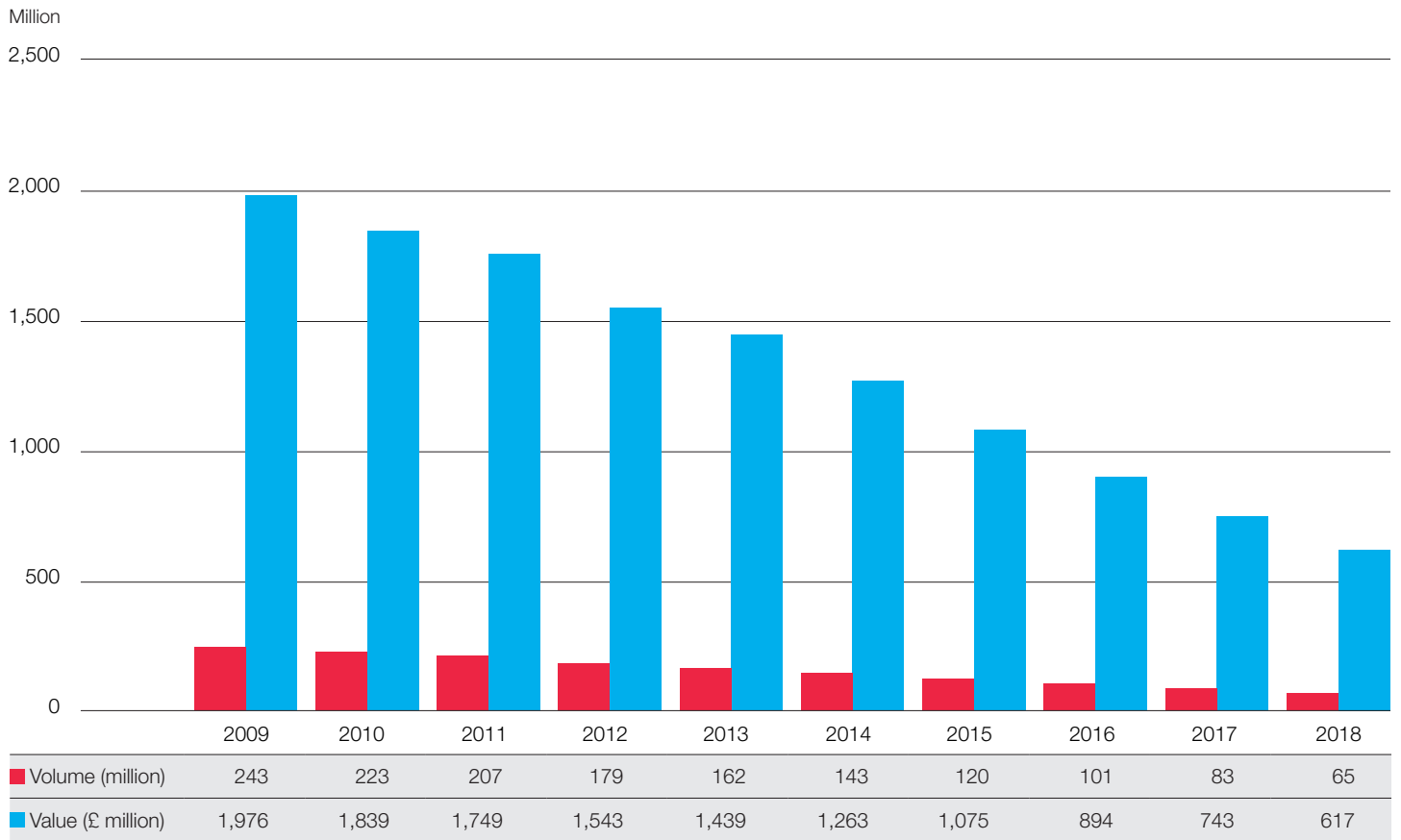
FILM IN THE PHYSICAL VIDEO RETAIL MARKET

As Figure 1 shows, the volume and value of physical video sales in all categories in the UK declined each year between 2009 and 2018. (This trend has been ongoing since the peak in video sales in 2004 when 234 million units were bought by consumers with a value of £2.5 billion.) Overall, the value of physical video sales in the UK fell by 69% over the period.

In 2018, 65 million videos were sold (down 22% compared with 2017) with a total market value of £617 million (down 17% compared with 2017). DVDs accounted for the majority of video sales (76% by value and 83% by volume), while Blu-ray disc purchases accounted for 24% of sales by value and 17% of sales by volume. (The share of the retail video market generated by Blu-ray sales, by both value and volume, has increased year on year since the format's introduction in 2006.)

Feature film represented approximately 73% of the physical sell-through market by value (£451 million) and 80% by volume (52 million units) in 2018. UK films accounted for around 35% of sales by value (a slight increase from 34% in 2017) and 39% of sales by volume (an increase from 31% in 2017).

Figure 1 Retail video sales (all categories), 2009-2018

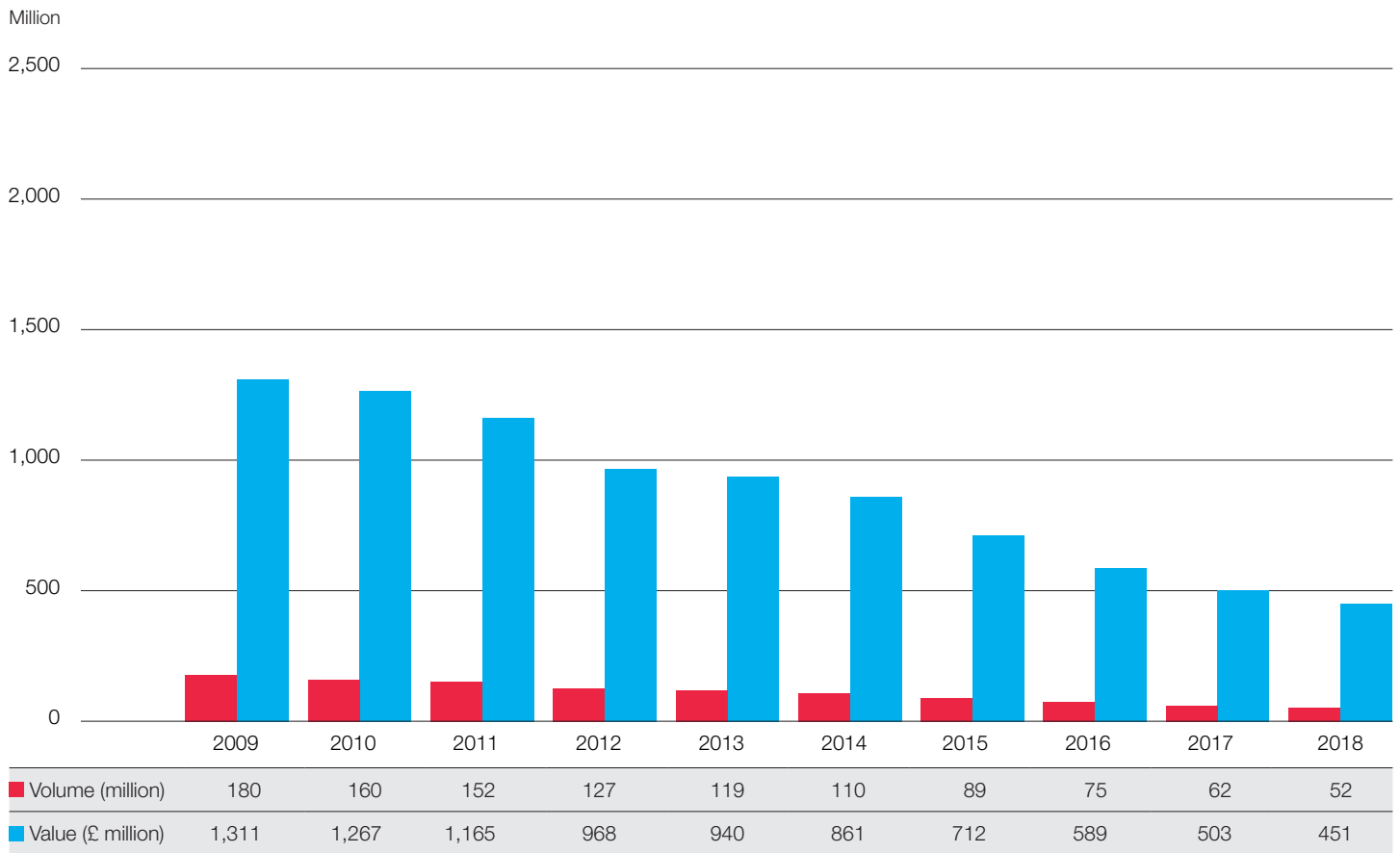


Source: IHS Markit

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

As Figure 2 shows, the trend for sales of film on physical video between 2009 and 2018 has mirrored that of the overall physical sell-through market, albeit at a slightly slower rate (Figure 2). The volume of videos sold fell from 180 million units in 2009 to 52 million units in 2018, while the value of sales decreased from £1.3 billion to £451 million. Overall, the value of the retail market for film on physical video in the UK decreased by 66% over the period.

Figure 2 Film on physical video retail sales, 2009-2018

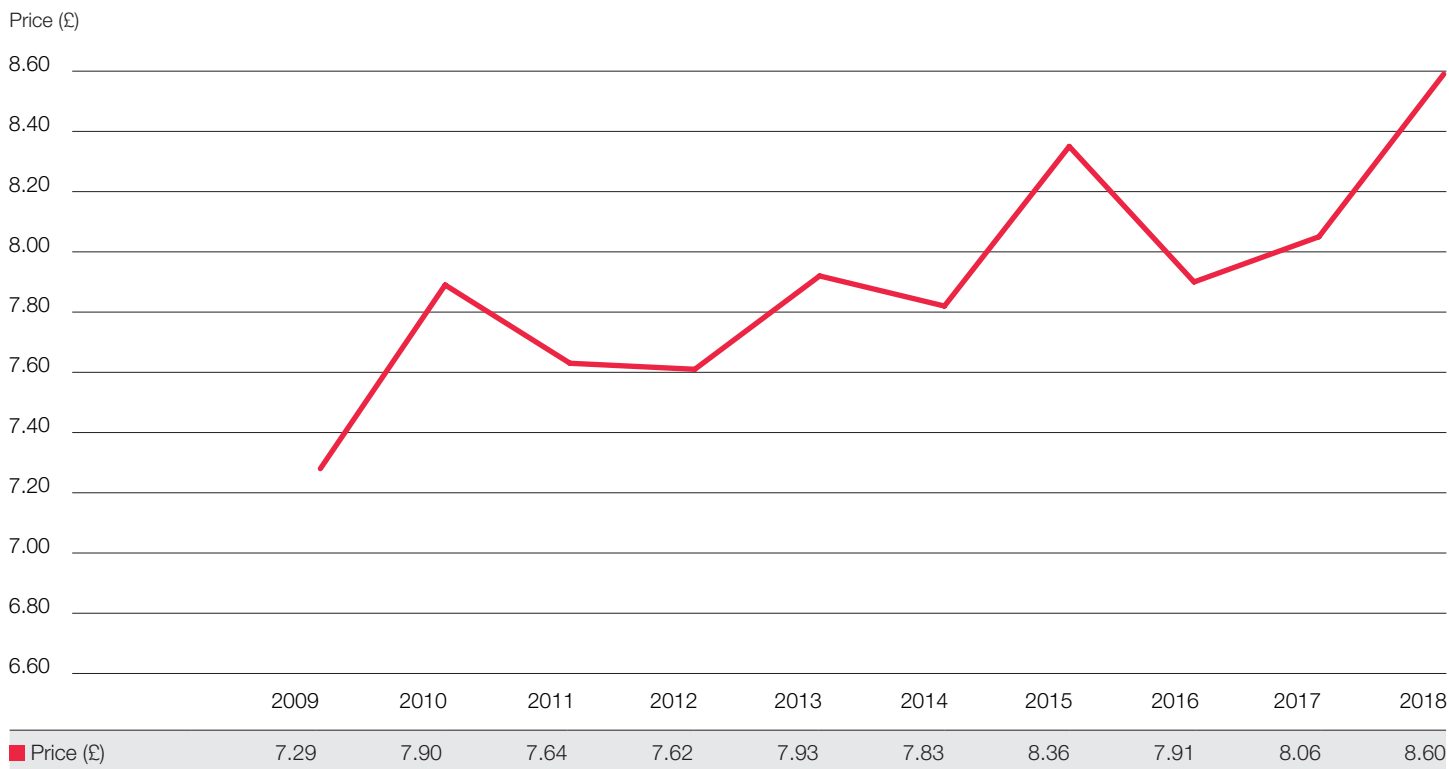


Source: BFI RSU analysis of Official Charts Company and BASE data

Note: Includes some feature films which would be classified as 'children's' videos in the BASE Yearbook.

Figure 3 shows an overall upward trend in the average unit price for film on physical video formats during the period, with costs rising from £7.29 in 2009 to £8.60 in 2018. The cost increase is due in part to the increasing share of Blu-ray sales in the physical video market, as this format generally attracts higher prices than its DVD counterpart.

Figure 3 Average retail price of film per unit, 2009-2018

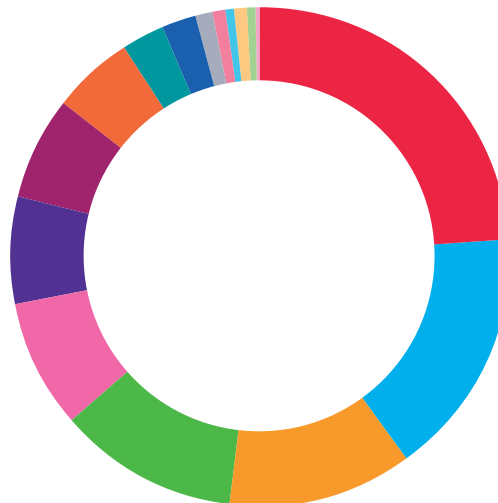


Source: BFI RSU analysis of Official Charts Company and BASE data

As Figure 4 shows, the most popular film genre on sell-through video in 2018 was action/adventure, which accounted for 24% of the market (18% in 2017). Sci-fi was the next most popular with 16% of sales, followed by children’s animated with 12%. (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 the first chapter of the Yearbook, Film at the cinema.)

Figure 4 Sales of film on physical video formats by genre, 2018

Genre	%
Action/adventure	24.1
Sci-fi	16.0
Children’s animated	12.0
Drama	11.6
Musical	8.4
Child/family	7.0
Comedy	6.6
Horror	5.5
Thriller	2.6
War	2.4
Documentary	0.9
Anime	0.8
Fitness	0.8
Western	0.7
Sport/health/fitness	0.6
Adult	0.1
Bollywood	<0.1
Other	<0.1



Source: Official Charts Company, BASE



Image: Paddington 2 courtesy of StudioCanal

TOP FILMS ON PHYSICAL VIDEO

Table 1 shows the top 10 best-selling films on physical video in 2018. The list is headed by *The Greatest Showman*, one of four titles released at the UK and Republic of Ireland box office in 2017. The remainder of the list is made up of 2018 theatrical releases, including the year's top earning film, *Avengers: Infinity War*. All of the 2018 releases were top 20 box office earners. There are five UK films in the list, one of which is an independent title.

Table 1 Top 10 best-selling films on physical video formats, 2018

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	The Greatest Showman	USA	2017	20th Century Fox
2	Star Wars: The Last Jedi	UK/USA	2017	Walt Disney
3	Mamma Mia! Here We Go Again	UK/USA	2018	Universal
4	Avengers: Infinity War	UK/USA	2018	Walt Disney
5	Thor: Ragnarok	USA	2017	Walt Disney
6	Black Panther	USA	2018	Walt Disney
7	Paddington 2	UK/Fra	2017	StudioCanal
8	Solo: A Star Wars Story	UK/USA	2018	Walt Disney
9	Peter Rabbit	USA/Aus	2018	Sony
10	Deadpool 2	USA	2018	20th Century Fox

Source: Official Charts Company

As Table 2 shows, the top 10 best-selling UK qualifying films on physical video in 2018 include five titles which are also in the year's overall top 10 films on video chart. The list is headed by *Star Wars: The Last Jedi*, the top earning film at the UK and Republic of Ireland box office in 2017, and one of four titles released theatrically in that year. The six remaining titles in the chart were released theatrically in 2018. There are two UK independent films in the list, up from one in 2017.

Table 2 Top 10 best-selling UK qualifying films on physical video formats, 2018

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Star Wars: The Last Jedi	UK/USA	2017	Walt Disney
2	Mamma Mia! Here We Go Again	UK/USA	2018	Universal
3	Avengers: Infinity War	UK/USA	2018	Walt Disney
4	Paddington 2	UK/Fra	2017	StudioCanal
5	Solo: A Star Wars Story	UK/USA	2018	Walt Disney
6	Jurassic World: Fallen Kingdom	UK/USA	2018	Universal
7	Darkest Hour	UK/USA#	2018	Universal
8	Justice League	UK/USA/Can	2017	Warner Bros
9	Kingsman: The Golden Circle	UK/USA	2017	20th Century Fox
10	Mission: Impossible - Fallout	UK/USA	2018	Universal

Source: Official Charts Company, BFI RSU

Film made with independent (non-studio) US support or with the independent arm of a US studio.

The list of the top 10 best-selling UK independent films on physical video in 2018 is headed by *Paddington 2*, the only film to appear in all of the three main top 10 tables. Unusually, this title appears twice in the current list – as a single physical video release and as part of a box set with the original 2014 release. The first Paddington film appears in the top 10 list for the fourth consecutive year, which indicates the enduring popularity of this series with British audiences.

Table 3 Top 10 best-selling UK independent films on physical video formats, 2018

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Paddington 2	UK/Fra	2017	StudioCanal
2	Darkest Hour	UK/USA [#]	2018	Universal
3	Victoria & Abdul	UK/USA [#]	2017	Universal
4	Early Man	UK/Fra	2018	StudioCanal
5	Paddington - 1 & 2	UK/Fra	2014/2017	StudioCanal
6	Three Billboards Outside Ebbing, Missouri	UK/USA [#]	2018	20th Century Fox
7	The Guernsey Literary and Potato Peel Pie Society	UK/Fra/USA [#]	2018	StudioCanal
8	Red Sparrow	UK/USA/Hun [#]	2018	20th Century Fox
9	The Commuter	UK/Fra/USA [#]	2018	StudioCanal
10	Finding Your Feet	UK	2018	20th Century Fox

Source: Official Charts Company, BFI RSU

[#] Film made with independent (non-studio) US support or with the independent arm of a US studio.

As Table 4 shows, the top 10 list of best-selling feature documentaries on physical video in 2018 is evenly split between sports-related films and others. (This is the first top 10 chart since 2013 not to be dominated by films about sport or sports personalities.)

The two most popular documentary films on physical video in the year were both war-themed titles: Peter Jackson's homage to the troops of WWI, *They Shall Not Grow Old*, and *Spitfire*, a film about the role of the iconic WWII fighter plane and its pilots in the Battle of Britain. (*They Shall Not Grow Old* was also the year's most successful non-concert UK documentary at the UK and Republic of Ireland box office.) Four of the five sports titles are football-related documentaries. There are two films about players turned managers – *Bobby Robson: More Than a Manager* and *Kenny*, the story of Kenny Dalglish – and two films about football teams – *89*, a film about Arsenal's last-minute footballing triumph in the 1988/89 season and *Take the Ball, Pass the Ball*, a film about FC Barcelona's success under manager Pep Guardiola. The other titles in the list are: *Conor McGregor: Notorious*, a film about the controversial Irish martial arts fighter; *My Generation*, a film about the Sixties cultural revolution in the UK; *McQueen*, a biopic of British fashion designer Alexander McQueen; and *Fred: The Godfather of British Crime*, a film about the ageing gangster Freddie Foreman.

Three of the films in the table also appeared in the 2017 top 10 list: *89*, *Conor McGregor: Notorious* and *Kenny*. Eight of the top 10 films are UK qualifying productions.

Table 4 Top 10 best-selling documentary films on physical video formats, 2018

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	They Shall Not Grow Old	UK	2018	Warner Bros
2	Spitfire	UK	2018	Altitude
3	Bobby Robson: More Than a Manager	UK	2018	Spirit Entertainment
4	My Generation	UK	2018	Lionsgate
5	Conor McGregor: Notorious	Ire	2017	Universal
6	Kenny	UK	2017	Spirit Entertainment
7	McQueen	UK	2018	Lionsgate
8	Fred: The Godfather of British Crime	UK	2018	Lionsgate
9	89	UK	2017	Universal
10	Take the Ball, Pass the Ball	Spa	2018	Universal

Source: Official Charts Company, BFI RSU

Note: Titles based on music concerts are not included.



Image: Kiki's Delivery Service courtesy of StudioCanal

Eight of the top 10 best-selling foreign language films on physical video in 2018 were Japanese titles, six of which are from the catalogue of Studio Ghibli. The list is headed by Hayao Miyazaki's Studio Ghibli production *My Neighbour Totoro*, which appears in the top 10 for the fourth consecutive year. (Five of the Studio Ghibli titles were directed by Miyazaki.) The two other Japanese titles in the top 10 are Makoto Shinkai's anime film *Your Name* and Takashi Miike's live-action manga adaptation *Blade of the Immortal* (a UK co-production).

The two non-Japanese films in the list are the Chinese WWII film *The Bombing* (in Mandarin, English and Japanese) and the French/Belgian thriller *Revenge* (in French and English).

Table 5 Top 10 best-selling foreign language films on physical video formats, 2018

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	My Neighbour Totoro	Jpn	1989	StudioCanal
2	Your Name	Jpn	2016	Anime
3	Blade of the Immortal	UK/Jpn/S.Kor	2017	Arrow Films
4	Howl's Moving Castle	Jpn	2005	StudioCanal
5	Princess Mononoke	Jpn	2001	StudioCanal
6	The Bombing	Chn	2018*	Signature Entertainment
7	Kiki's Delivery Service	Jpn	1991	StudioCanal
8	Revenge	Fra/Bel	2018	Thunderbird
9	Ponyo	Jpn	2010	StudioCanal
10	The Cat Returns	Jpn	2005	StudioCanal

Source: Official Charts Company, BFI RSU

Notes:

The animated films in this table were all released on physical video with the option to view either with the original Japanese language soundtrack (with English subtitles) or with a dubbed version.

* *The Bombing* was released theatrically in the Philippines and other territories in 2018. It was released straight to video in the UK in the same year.

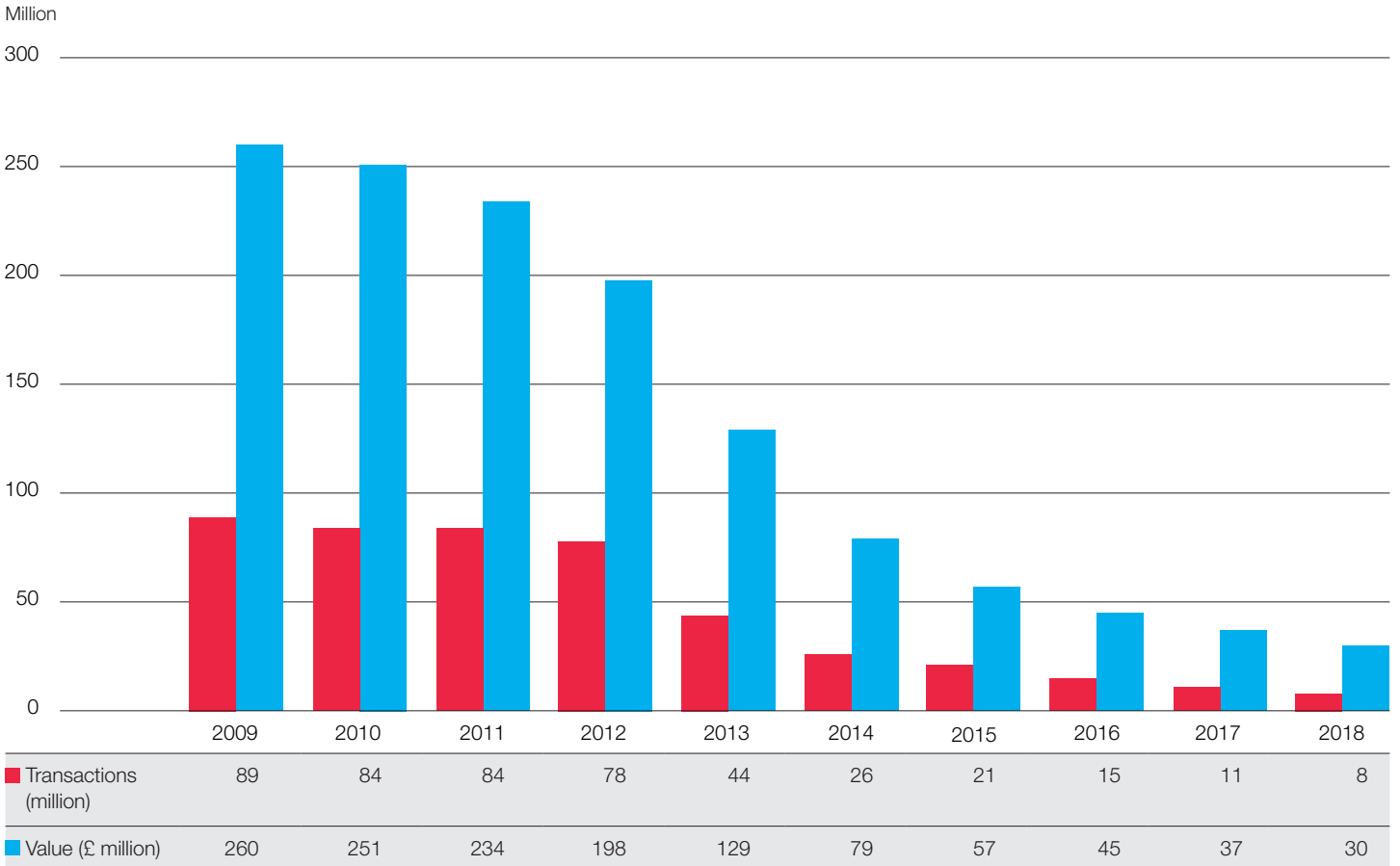
Older titles, in particular classic family films, also remain popular video purchases, due in part to theatrical re-releases or other events associated with the films. In 2018, three films re-released on video to coincide with upcoming sequels or re-makes – *Mary Poppins* (1964), *The Lion King* (1994) and *The Grinch* (released theatrically as *The Grinch who Stole Christmas* in 2000) – appeared in the list of the year's top 100 best-selling films on video.

FILM IN THE PHYSICAL VIDEO RENTAL MARKET

While competition from streaming services has contributed to a significant contraction in the video sell-through market, its impact on the rental market has been more consequential. At £30 million, revenues from rentals in 2018 represent less than 12% of the market's value in 2009 (£260 million), while the volume of transactions was down 91%, from 89 million in 2009 to eight million in 2018 (Figure 5). With the exception of Cinema Paradiso, all of the major physical video rental providers have ceased operating. According to BASE, the pool of traditional physical rental customers in the UK in 2018 was 500,000 people, a drop of 50% compared with 2017.

The average price of a physical video rental in 2018 was £3.75, and online renting of physical discs (with postal delivery) accounted for 78% of rental transactions.

Figure 5 Film on physical video rental market, 2009-2018



Source: IHS

FILM ON DIGITAL VIDEO

With the exception of cinema-goers, UK audiences for film are increasingly retreating from traditional methods of film consumption in favour of on-demand services. In 2018, digital video represented approximately 23% of the value of the UK filmed entertainment market, compared with only 3% in 2009.

Digital video or Video on Demand (VoD) is used in this section as the generic description of both over the top (OTT) streamed or downloaded content delivered via the internet and on-demand content offered by traditional cable or satellite pay TV services such as Sky.

OTT service providers in the UK employ three basic types of business model:

- Transactional (TVoD) which comprises:
rental digital video, a one-off rental for a limited time, including both streaming and Download to Rent (DTR); and retail digital video, also known as Electronic Sell Through (EST) or Download to Own (DTO) – most providers of transactional on-demand services, such as iTunes or Google Play, offer both rental and retail film content, however some services, such as Curzon Home Cinema, deal exclusively with rental content
- Subscription (SVoD) which delivers unlimited access to content for a regular fixed sum – providers include Netflix, Amazon Prime Video and Now TV
- Free/advert-supported – providers include YouTube (excluding YouTube Premium), Facebook Watch and catch-up services from the major broadcasters (also known as BVoD) such as BBC iPlayer and ITV Hub (excluding ITV Hub+).



Image: Avengers: Age of Ultron © 2015 Marvel

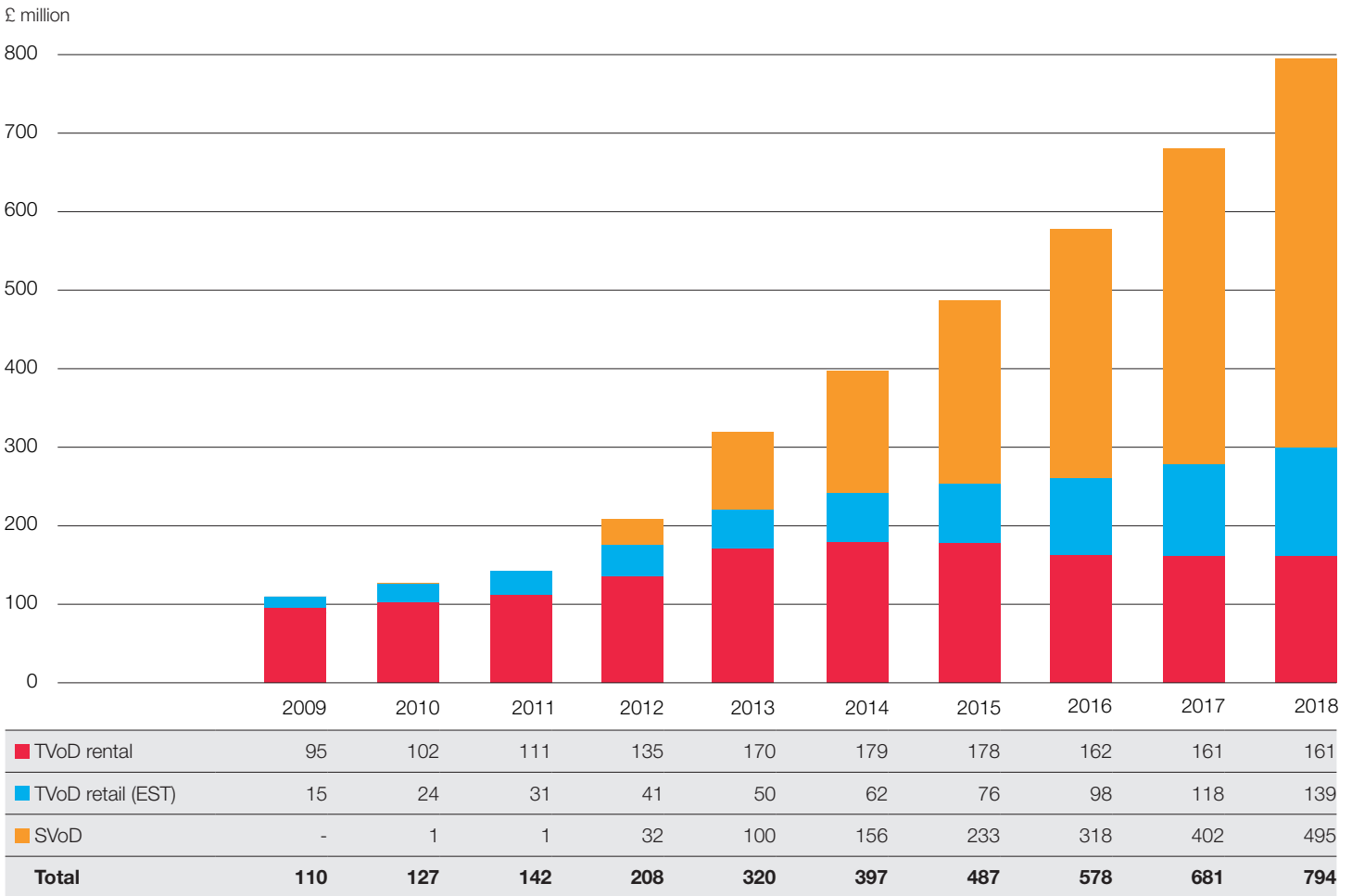
FILM IN THE DIGITAL VIDEO MARKET

According to IHS, the estimated value of the on-demand market for film in the UK in 2018 was £794 million, an increase of 17% compared with 2017, and more than seven times its value in 2009 (Figure 6).

Much of the recent growth in the market is attributable to a rise in the use of subscription streaming services. Revenues from SVoD platforms are estimated to have been £495 million in 2018, an increase of 23% compared with 2017 (£402 million). Overall TVoD revenues were also up compared with 2017 but only due to a rise in retail sales: EST revenues in 2018 are estimated to have been £139 million, an increase of 18% compared with 2017 (£118 million), while rental revenues were unchanged at £161 million.

In 2018, digital video revenues outstripped those of physical video for the second consecutive year.

Figure 6 Estimated value of the digital video film market in the UK, 2009-2018



Source: IHS

Notes:

Estimates include both television-based and online digital video revenues.

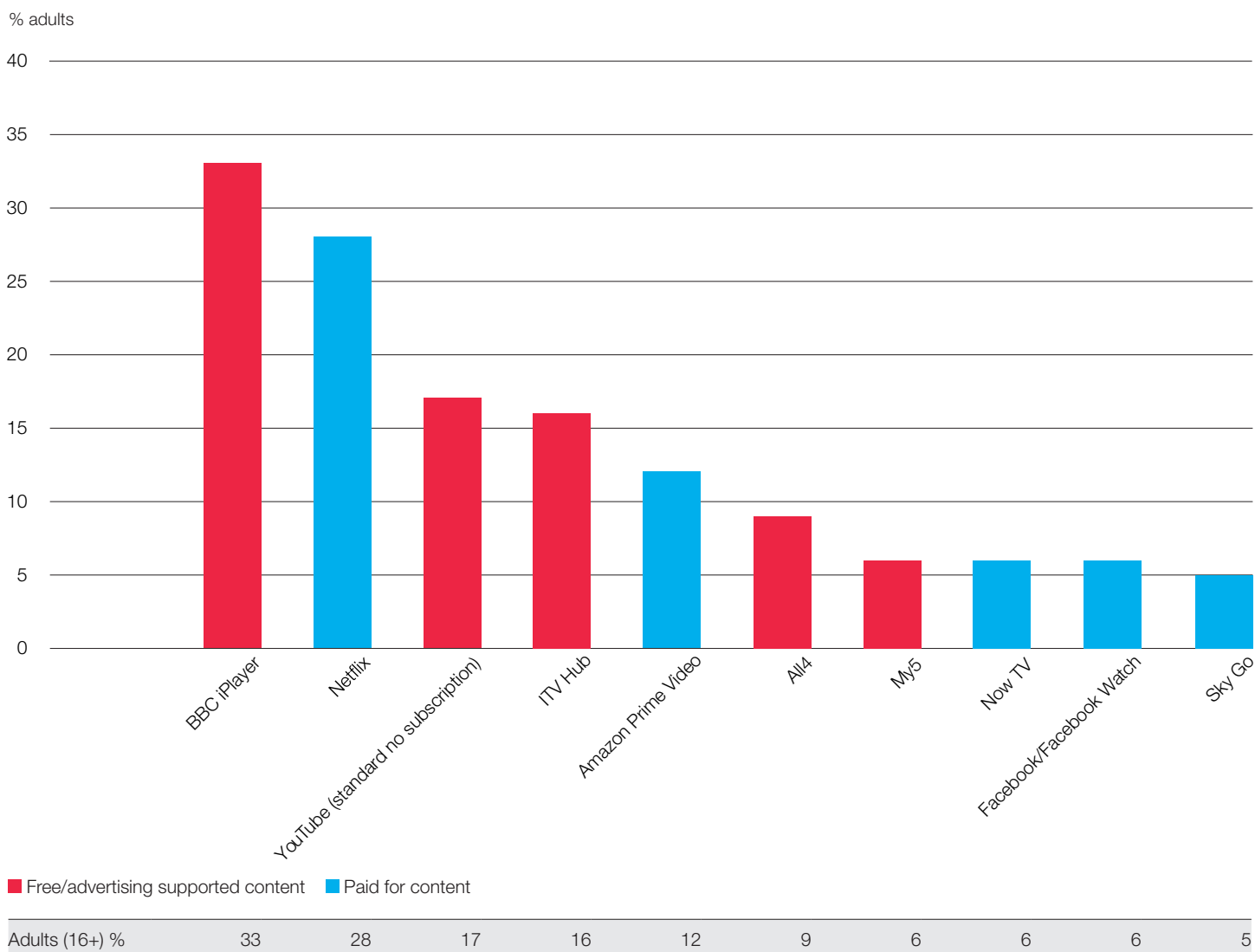
Figures may not sum to totals due to rounding.

POPULARITY OF ON-DEMAND STREAMING SERVICES

UK viewers are among the highest consumers of on-demand content in the world, thanks to the popularity of both international SVoD platforms and catch-up services from domestic broadcasters. Data from Ampere Analysis shows that as of Q1 2019, 78% of all households in the UK watch VoD at least once a month, compared with 64% in Germany and 51% in France.

Figure 7 shows the top 10 most popular on-demand streaming services (for both film and television programmes) in 2018 amongst UK adults (16+). The top 10 is split evenly between free/advert supported and paid-for services, and features all of the UK-wide broadcaster catch-up services. The BBC iPlayer (used by 33% of adults) was the most popular service overall, Netflix (28%) was the most popular OTT SVoD service, and Sky Go (5%) was the most popular pay TV provider.

Figure 7 Top 10 most popular on-demand streaming services in the UK, 2018



Source: Ofcom Technology Tracker 2018

Q: Do you use any of these services to view online TV programmes or films via any type of device (including a mobile phone, tablet, or TV set)? n=3,730

Note: The source of this data has changed since publication of the 2018 Statistical Yearbook; the users share for individual services are not directly comparable with previously published data, however, the overall ranking is similar.

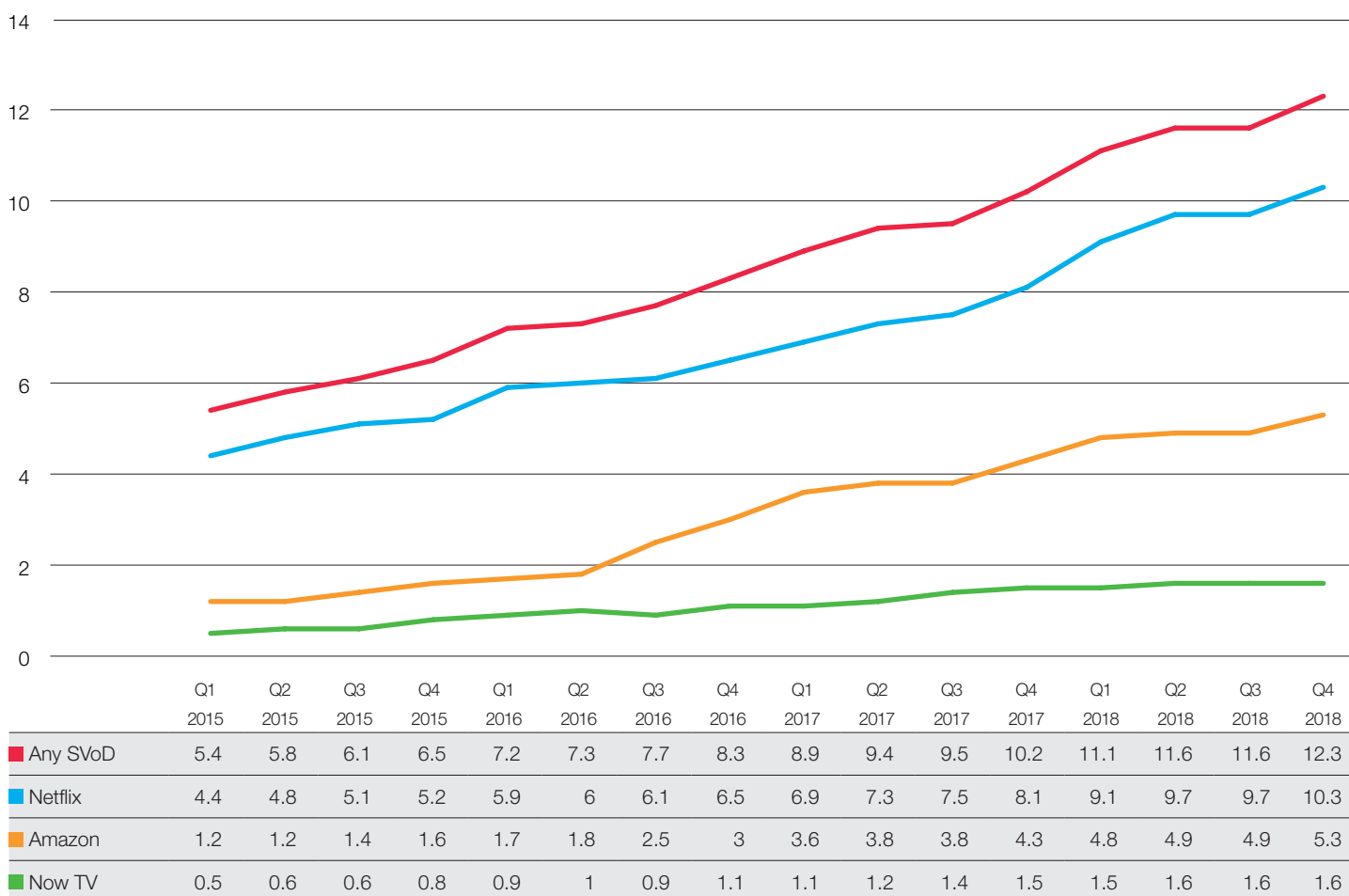
THE AUDIENCE FOR SVoD

One of the key drivers of growth in the digital video market in the UK in recent years has been the rapid take-up of OTT SVoD services. As Figure 8 shows, the number of households with access to these services increased from 5.4 million in Q1 2015 to 12.3 million in Q4 2018, due largely to rising subscriber numbers for the three most popular providers: Netflix, Amazon Prime Video and Now TV (owned and operated by Sky). In Q4 2018, Netflix was available in 10.3 million UK homes, Amazon Prime Video in 5.3 million homes, and Now TV in 1.6 million homes.

As the overall number of subscriptions to UK SVoD services has increased, so too has the number of households opting to sign up to more than one platform. According to BARB Establishment Survey data, by Q4 2018, 4.3 million households had access to two or more SVoD services, a rise of 32% compared with 3.3 million in Q4 2017. (For more on SVoD audiences, see the Audiences chapter.)

Figure 8: UK SVoD households, Q1 2015 – Q4 2018

Millions of households



Source: BARB Establishment Survey, RSU analysis

THE AUDIENCE FOR FILM ON SVoD

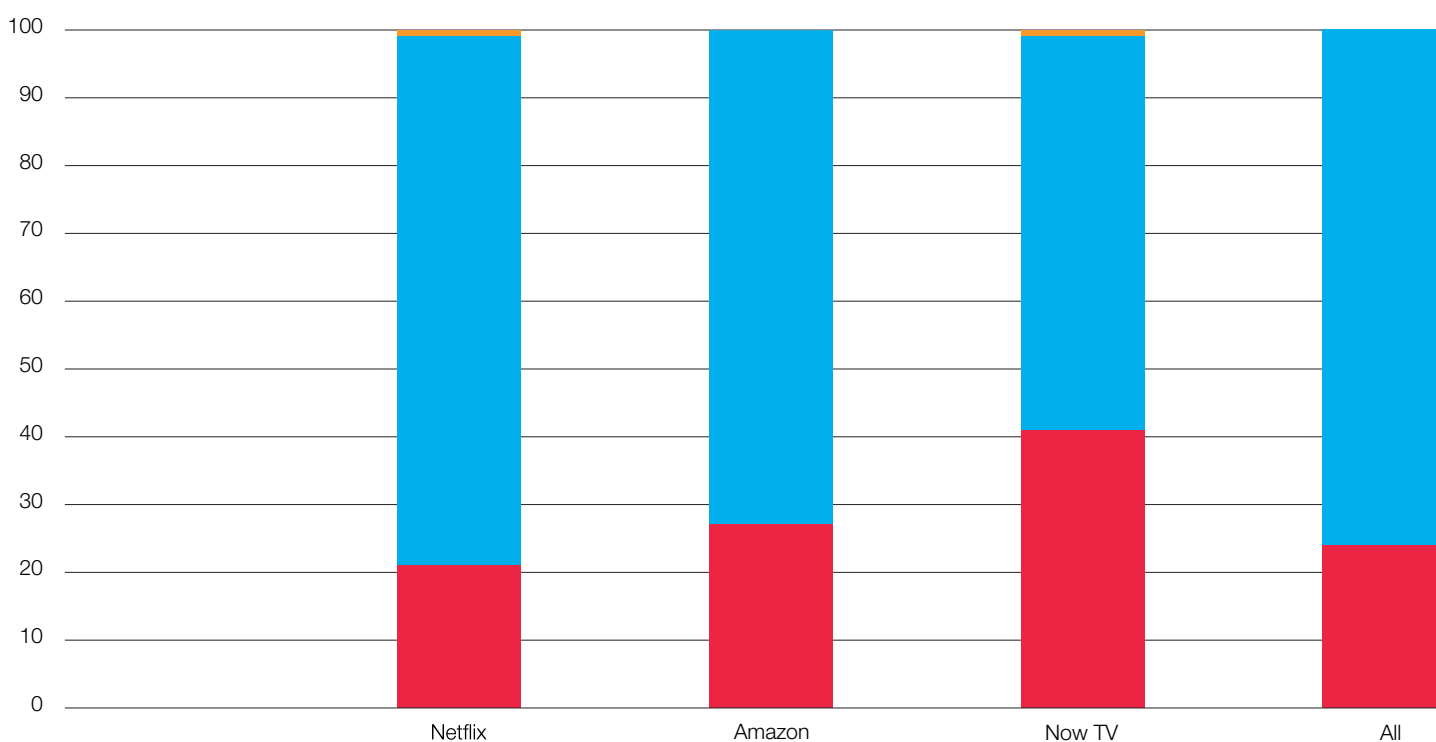
One of the key differences in the content of SVoD and BVoD platforms in the UK is the general lack of availability of feature film on the broadcaster services. Although making up a smaller proportion of the content libraries of SVoD platforms than archive or commissioned television series, feature film is an important component of the programming mix.

Figure 9 shows the share of viewing time devoted to film vs television programmes by subscribers to the UK's three main SVoD platforms compared with all SVoD users. On average, UK subscribers devote just under one quarter (24%) of their total viewing time to watching films. Amongst the top three providers, Now TV subscribers spend the largest share of their viewing time watching films (41%) while Netflix subscribers spend the smallest (21%).

It is interesting to note that while the consumption of film across SVoD platforms is lower than that of television content, it is considerably higher than on linear television. According to BARB data, in 2018, film accounted for around 8% of all viewing time on television. (Viewing figures are not directly comparable, however, as television offers a wider mix of programming including news, current affairs and sports.)

Figure 9 Share of viewing by content on UK SVoD platforms, 2018

% of all minutes consumed



Content Type	Netflix	Amazon	Now TV	All
Film	21	27	41	24
TV series	78	73	58	76
Other TV	1	0	1	<1

Source: GfK, UK SVoD Tracker, Calendar 2018, All adults 18+ who use SVoD platforms at least once every two weeks

Note: Other TV includes non-series television productions, such as single dramas and one-off specials.

TOP FILMS ON SVoD

Table 6 lists the top 10 most popular films viewed on the UK's three largest subscription streaming platforms in 2018. It should be noted that unlike other top 10 or 20 lists in the Yearbook, entries in the table are derived from a sample so should be viewed as indicative rather than definitive.

The list is headed by *Bright*, an original Netflix production released directly on the platform in late 2017, and one of two titles to appear in the top 10 for a second consecutive year (the other is *Avengers: Age of Ultron*). There are two other Netflix original films in the list: *The Christmas Chronicles*, which was also released directly on the platform, and *Outlaw King*, which had a limited day-and-date theatrical release in the UK through Curzon Artificial Eye alongside its Netflix premiere. Nine of the titles were exclusively available to stream on Netflix in 2018, although some of the titles were also available to VoD consumers via rentals on other platforms. With the exception of the Netflix originals, all but one of the top 10 titles were 2014-2017 theatrical releases. *Love Actually*, which was released theatrically in 2003, is one of four UK qualifying productions in the list.

Table 6 Top 10 films viewed on leading UK SVoD platforms, 2018 (ranked by minutes consumed)

Rank	Title	Country of origin	Main provider	Year of release in the UK	% share of total film minutes consumed
1	Bright*	USA	Netflix	2017	0.69
2	The Christmas Chronicles*	USA/Can	Netflix	2018	0.65
3	The Hitman's Bodyguard	UK/USA/Nld	Netflix	2017	0.55
4	Deadpool	USA	Netflix	2016	0.50
5	Love Actually	UK/Fra/USA	Netflix	2003	0.41
6	Outlaw King*	UK/USA	Netflix	2018	0.40
7	Batman v Superman: Dawn of Justice	USA	Amazon Prime Video	2016	0.39
8	Avengers: Age of Ultron	UK/USA	Netflix	2015	0.39
9	Captain America: The Winter Soldier	USA	Netflix	2014	0.39
10	Captain America: Civil War	USA	Netflix	2016	0.38

Source: RSU, GfK, UK SVoD Tracker, Calendar 2018, claimed viewership on Amazon Prime Video, Netflix or Now TV

Notes:

Due to the low figures for percentage of total minutes viewed, figures are shown to two decimal places.

* Film was released directly on the Netflix platform without a prior cinema release, or with a limited cinematic release.



Image: *Deadpool* courtesy of Twentieth Century Fox. All rights reserved

In the few years since Netflix launched its first original film (*Beasts of No Nation*, 2015) the streaming giant has come to rival the Hollywood majors in the scale of its annual film offer. In 2018, Netflix released 70 original films (not counting feature documentaries) on its streaming service compared with 86 theatrical releases from the six major studios. With the platform set to lose some licensed content (across both film and television) as providers move to launch their own SVoD services (e.g. Disney+), original content has become an increasingly important part of the platform's business. To raise the profile of its original films brand, Netflix has adopted a theatrical/streaming release strategy for a number of key titles which has seen the platform garner increasing numbers of award nominations (Netflix films received 15 nominations at the 2019 Academy Awards® and won in four categories).

Table 7 shows the top 10 most viewed original Netflix films by users of the platform. The list is headed by the three originals which appear in the previous top 10: *Bright*, *The Christmas Chronicles* and *Outlaw King*. Interestingly, the fourth most popular original on the list is *Bird Box* which was released on the platform on 21 December, eight days before the close of the year. (Our analysis of a cross section of Netflix originals shows that, on average, 51% of all viewing for these titles took place in the first two months of release on the platform.) The Netflix original film *Roma*, which received a day-and-date release in November 2018, and went on to win four BAFTA Awards and three Oscars® in 2019, does not appear in the list.

Table 7 Top 10 Netflix original films*, 2018 (ranked by minutes consumed)

Rank	Title	Country of origin	Year of release in the UK	% share of total Netflix minutes consumed
1	Bright	USA	2017	1.09
2	The Christmas Chronicles	USA	2018	1.02
3	Outlaw King	UK/USA	2018	0.64
4	Bird Box	USA	2018	0.58
5	Annihilation	UK/USA	2017	0.57
6	The Kissing Booth	USA	2018	0.47
7	To All the Boys I Loved Before	USA	2018	0.45
8	The Cloverfield Paradox	USA	2018	0.44
9	The Princess Switch	USA	2018	0.40
10	The Foreigner	UK/USA/Chn	2017	0.37

Source: RSU, GfK, UK SVoD Tracker, Calendar 2018, claimed viewership on Amazon Prime Video, Netflix or Now TV

Notes:

* The Netflix classification of originals includes titles commissioned directly by the platform, or those purchased from the Hollywood majors and other producers for exclusive distribution in some or all worldwide territories.

Due to the low figures for percentage of total minutes viewed, figures are shown to two decimal places.

FILM ON TELEVISION

Despite increased competition from on-demand providers of film content, in terms of viewer numbers television remains the single most important platform for film consumption in the UK. Viewers had a choice of 7,100 unique films titles across all channels in 2018, and the cumulative film audience was 2.3 billion.

PROGRAMMING ON THE TERRESTRIAL CHANNELS

In 2018, terrestrial television channels accounted for 24% of all viewings of film on television. (Terrestrial television is used here to describe the previous national terrestrial analogue services, all of which have some degree of public service obligation.) Table 8 shows the total number of feature films broadcast on the five terrestrial channels in 2018 and the number of UK titles broadcast in that time. UK films are broken down into recent titles (films released theatrically between 2009 and 2018) and older titles (released pre-2009). Here, UK films include all titles listed as UK-originated by the Broadcasters' Audience Research Board (BARB), plus UK qualifying films given other nationalities (mostly USA) in the BARB data.

There were 1,298 film transmissions on terrestrial television in 2018, down from 1,666 in 2017, an average of just over four films a day. Over one quarter (28%) of the films shown were UK titles. Channel 4 broadcast the greatest number of films overall (412) and the greatest number of recent UK films (75) while BBC Two showed the greatest number of UK films overall (121).

In total, the terrestrial channels broadcast 1,093 unique film titles in 2018, down from 1,278 unique titles in 2017.

Table 8 Feature films broadcast¹ on terrestrial television 2018

	Number of films broadcast	Number of UK films broadcast ¹	UK films as % of total	Number of recent UK films broadcast ²	Recent UK films as % of total films broadcast
BBC One	154	47	30.5	38	24.7
BBC Two	276	121	43.8	62	22.5
ITV	161	43	26.7	18	11.2
Channel 4	412	91	22.1	75	18.2
Channel 5	295	57	19.3	32	10.6
Total	1,298	359	27.7	225	17.3

Source: BARB, BFI RSU analysis

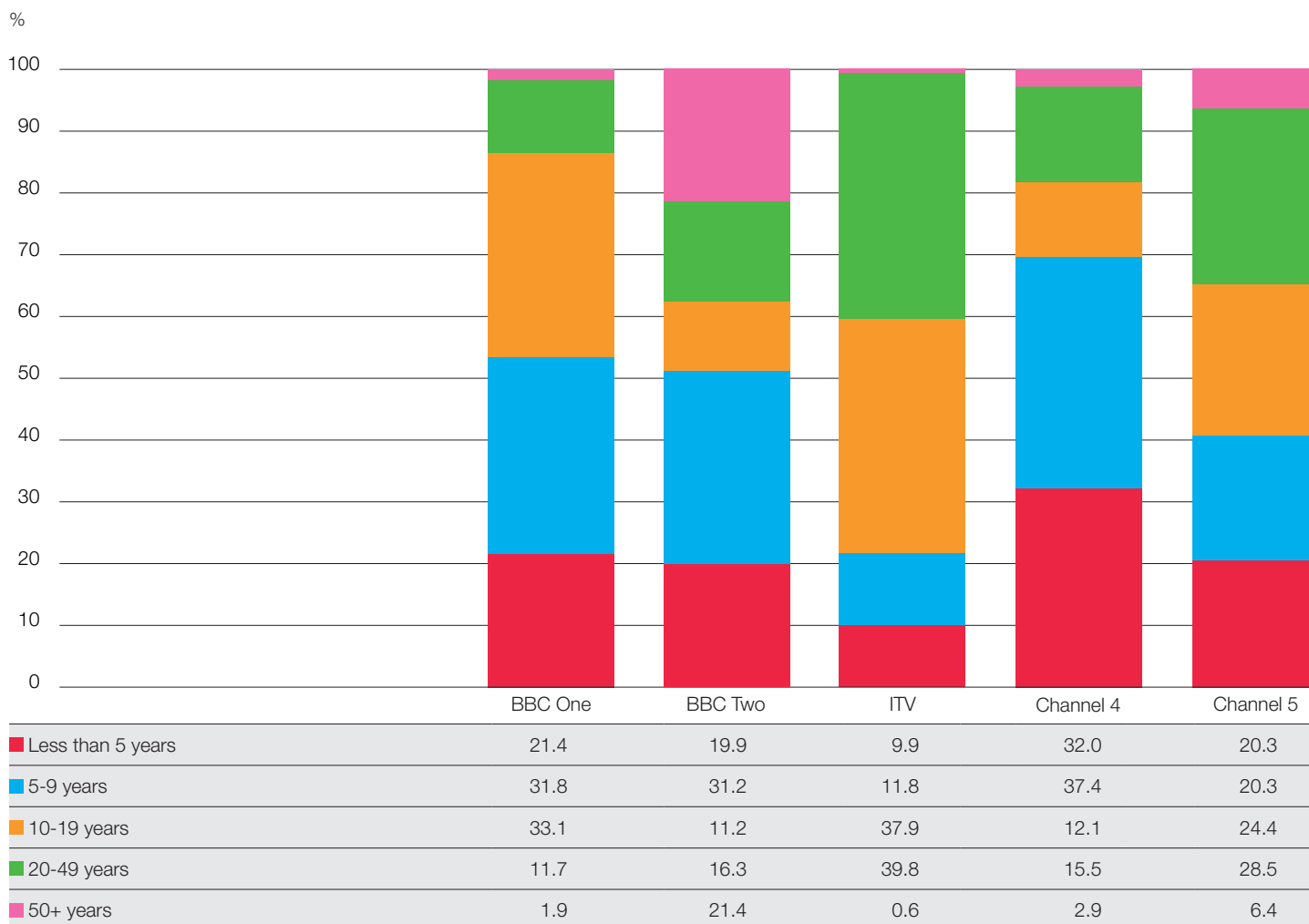
¹ Includes repeat broadcasts of individual titles.

² A recent film is one which has been theatrically released, or intended for release, in the UK since 2009.

Figure 10 shows the percentage of films broadcast on the terrestrial channels in 2018 across five age-range categories. (For this analysis, the age of a film is determined by its year of release in the UK, not production year.)

Recent titles made up a larger share of Channel 4's film output than for the other terrestrial channels. Just under one third (32%) of the films shown by Channel 4 in 2018 were less than five years old, while 69% of its films were less than 10 years old. At the other end of the scale, 40% of the films shown on ITV had been released theatrically at least 20 years before 2018, while 21% of the films screened on BBC Two had been released at least 50 years before.

Figure 10 Percentage of feature film by age on terrestrial channels, 2018



Source: BARB, BFI RSU analysis

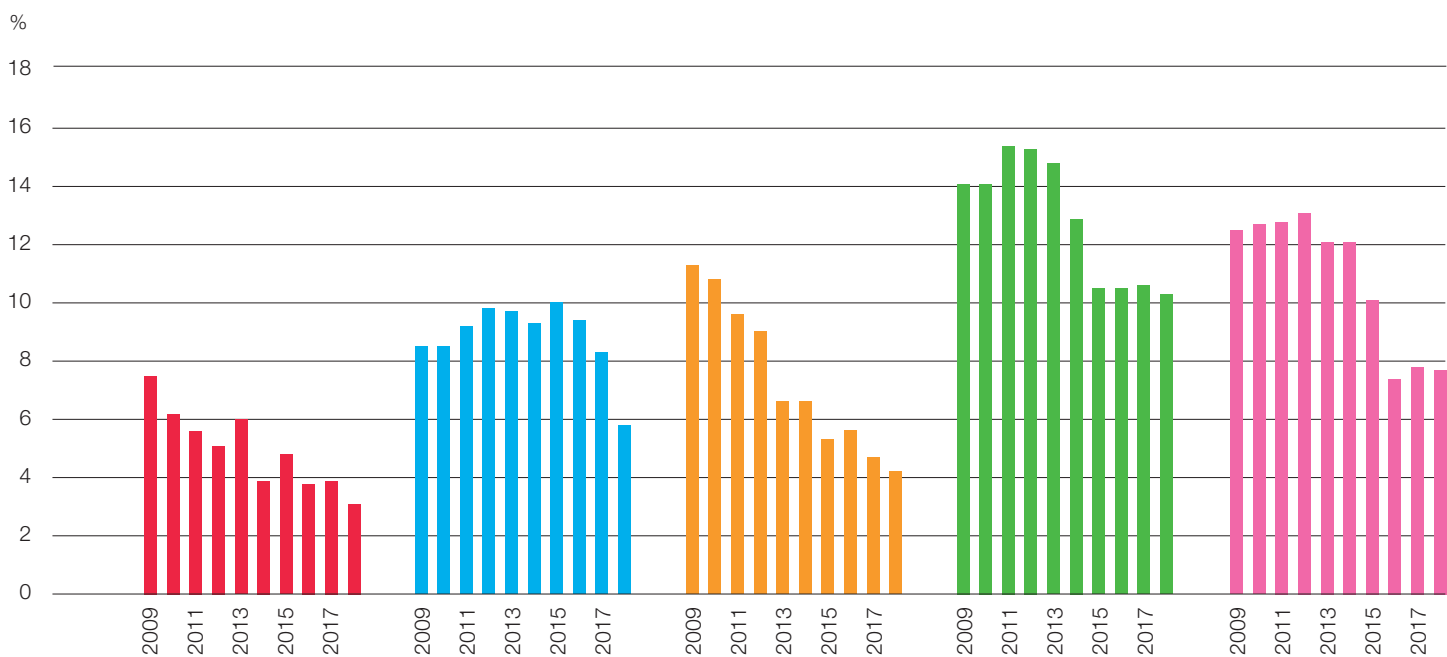
FILM ON TERRESTRIAL TELEVISION, 2009-2018

Figure 11 shows the share of total programming hours dedicated to feature film across the terrestrial channels between 2009 and 2018. (In previous editions of the Yearbook, we have reported data for peak-time film transmissions only. However, as many of the most popular films in a given year are shown during holiday or weekend day-time hours, we have extended coverage to include the entire broadcast day as defined by BARB: 06:00 to 27:00 hours.)

The percentage of programming hours dedicated to feature film varied widely across the terrestrial channels over the 10-year period. In most years, Channel 4 and Channel 5 had the highest share of film hours in their schedules, while BBC One consistently had the lowest. In 2018, feature film made up over 10% of Channel 4's output and 8% of Channel 5's, compared with 3% for BBC One.

Across the period, there has been an overall decline in the proportion of total programming time allotted to film, with the average share for terrestrial channels as a whole decreasing from 11% in 2009 to 6% in 2018.

Figure 11 Film as a percentage of total programming hours by channel, 2009-2018



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
■ BBC One	7.5	6.2	5.6	5.1	6.0	3.9	4.8	3.8	3.9	3.1
■ BBC Two	8.5	8.5	9.2	9.8	9.7	9.3	10.0	9.4	8.3	5.8
■ ITV	11.3	10.8	9.6	9.0	6.6	6.6	5.3	5.6	4.7	4.2
■ Channel 4	14.1	14.1	15.4	15.3	14.8	12.9	10.5	10.5	10.6	10.3
■ Channel 5	12.5	12.7	12.8	13.1	12.1	12.1	10.1	7.4	7.8	7.7

Source: BARB, BFI RSU analysis

Notes:

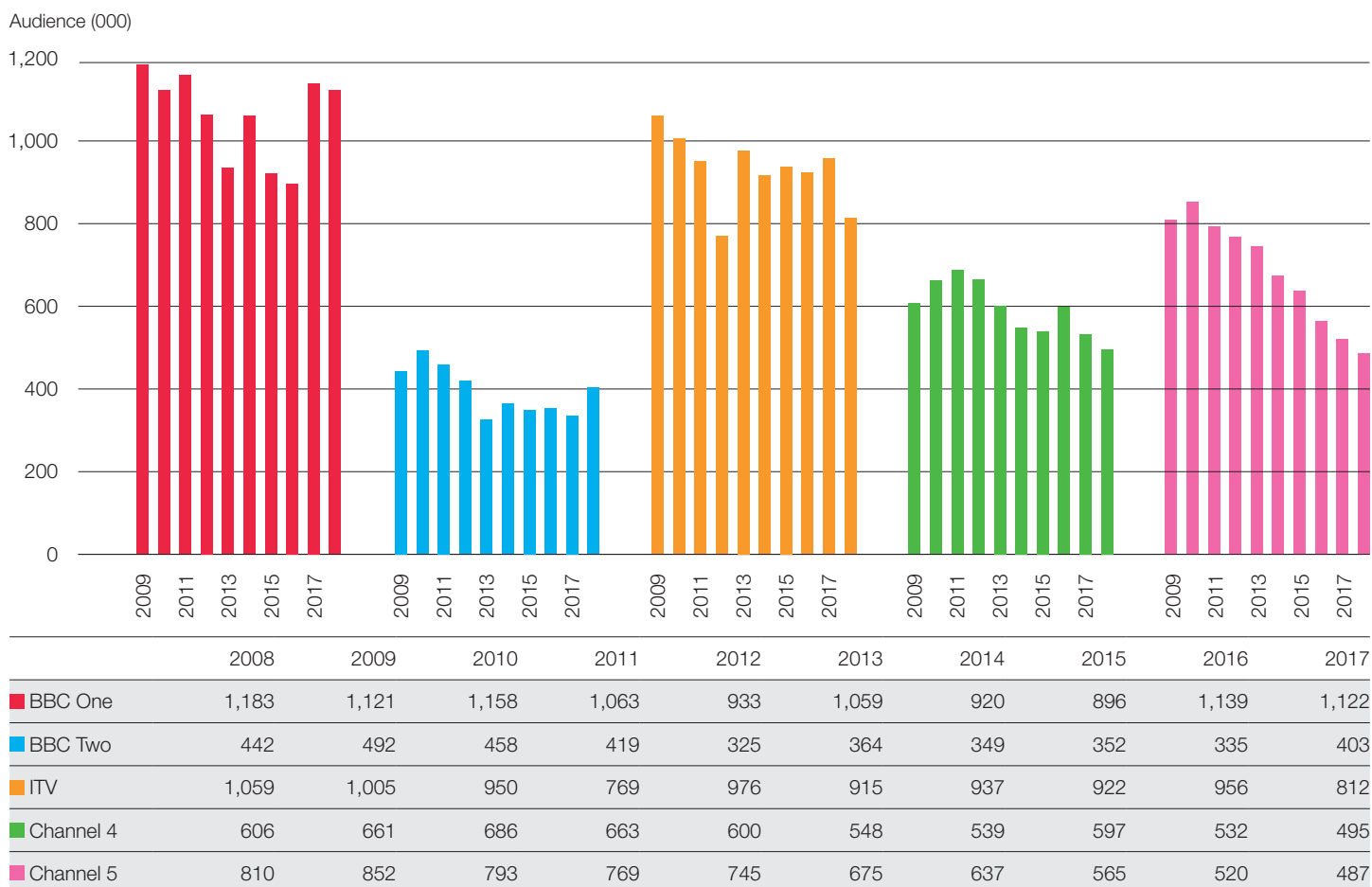
Programming hours: 06:00-27:00 (For reporting purposes the BARB broadcast day runs for 24 hours from 6:00. Times beyond 24:59 are reported using a thirty hour clock.)

Film duration includes commercial breaks and promotions within broadcast on commercial channels.

THE AUDIENCE FOR FILM ON TERRESTRIAL TELEVISION, 2009-2018

Figure 12 shows the average audience for feature film across all programming hours on the five terrestrial channels between 2009 and 2018. The general trend across the channels has been a gradual year-on-year decrease in the average viewership, which is partly attributable to the growth of competition from on-demand services during the period. BBC One and ITV had the highest average film audiences throughout the decade, while BBC Two had the lowest. The average audience for feature film transmissions in 2018 was 1.1 million on BBC One, 800,000 on ITV, 500,000 on both Channel 4 and Channel 5, and 400,000 on BBC Two.

Figure 12 Average audience for film, 2009-2018



Source: BARB, BFI RSU analysis

See notes to Figure 11.

TOP FILMS ON TERRESTRIAL TELEVISION

The most popular film on terrestrial television in 2018 was the 1964 Disney classic *Mary Poppins*, which attracted an average audience of 4.7 million viewers for its Christmas Eve screening on BBC One (Table 9). This is the first time since our records began that a non-network premiere was the most viewed film transmission on terrestrial channels. In total, seven of the top 10 films were premieres, the most popular of which was *Maleficent* which achieved 4.2 million viewers for its New Year's Day transmission on BBC One.

Four films in the top 10 achieved audiences of more than 4 million viewers compared with three in 2017. Five of the top 10 titles in 2018 were UK qualifying films: three were US studio-backed productions and two were UK independent productions.

Table 9 Top 10 films¹ on terrestrial television, 2018

Title	Channel	Country of origin	Year of release	Audience (million)
1 Mary Poppins	BBC One	USA	1964	4.7
2 Maleficent	BBC One	UK/USA	2014	4.2
3 SPECTRE	ITV	UK/USA	2015	4.1
4 Ant-Man	BBC One	UK/USA	2015	4.1
5 The BFG	BBC One	USA	2016	3.9
6 Brooklyn	BBC One	UK/Can/Ire	2015	3.9
7 Elf	ITV	USA	2003	3.3
8 Florence Foster Jenkins	BBC One	UK/Fra	2016	3.0
9 Home Alone 2: Lost in New York	Channel 4	USA	1992	2.9
10 The Good Dinosaur	BBC One	USA	2015	2.6

Source: BARB, RSU Analysis

¹ Films with the highest average audience (individuals aged 4+) for a single transmission, excludes repeats of the same title.



Image: *Florence Foster Jenkins* courtesy of Pathé UK

The top 10 most popular UK qualifying films on terrestrial television in 2018 include five titles which also appear in the year's overall top 10 films. The chart is headed by *Maleficent*, one of eight network premieres in the top 10 (Table 10). In recent years this list has been dominated by films from the Harry Potter franchise but the 2018 chart includes only one title from the series, *Harry Potter and the Chamber of Secrets*. There are two independent UK films in the list: *Brooklyn* and *Florence Foster Jenkins*. Both of these titles were backed by BBC Films and both received network premieres on BBC One.

Table 10 Top 10 UK qualifying films¹ on terrestrial television, 2018

Title	Channel	Country of origin	Year of release	Audience (million)
1 Maleficent	BBC One	UK/USA	2014	4.2
2 SPECTRE	ITV	UK/USA	2015	4.1
3 Ant-Man	BBC One	UK/USA	2015	4.1
4 Brooklyn	BBC One	UK/Can/Ire	2015	3.9
5 Florence Foster Jenkins	BBC One	UK/Fra	2016	3.0
6 Mission: Impossible - Rogue Nation	Channel 4	UK/USA	2015	2.2
7 Star Wars: Episode VII: The Force Awakens	ITV	UK/USA	2015	2.2
8 Harry Potter and the Chamber of Secrets	ITV	UK/USA	2002	2.0
9 Wallace and Gromit: The Curse of the Were-Rabbit	BBC One	UK/USA	2005	2.0
10 Kingsman: The Secret Service	Channel 4	UK/USA	2015	1.9

Source: BARB, RSU analysis

¹ Films with the highest average audience (individuals aged 4+) for a single transmission, excludes repeats of the same title.

The network premiere of *Brooklyn* on BBC One attracted the highest single average audience for a UK independent film on terrestrial television in 2018, with 3.9 million viewers tuning in for its broadcast in mid-March (Table 11). In total, seven of the top 10 films were network premieres, and five of the top 10 were backed by UK broadcasters (four were BBC Films titles and one was a Film4 title).

Table 11 Top 10 UK independent films¹ on terrestrial television, 2018

Title	Channel	Country of origin	Year of release	Audience (million)
1 Brooklyn	BBC One	UK/Can/Ire	2015	3.9
2 Florence Foster Jenkins	BBC One	UK/Fra	2016	3.0
3 Dad's Army	ITV	UK/USA [#]	2016	1.9
4 Eddie the Eagle	Channel 4	UK/USA/Ger [#]	2016	1.9
5 Spooks: The Greater Good	BBC One	UK	2015	1.8
6 Suffragette	Channel 4	UK/Fra	2015	1.8
7 Philomena	BBC Two	UK/Fra	2013	1.7
8 Paddington	Channel 4	UK/Fra	2014	1.7
9 Chitty Chitty Bang Bang	Channel 5	UK/USA [#]	1968	1.6
10 Swallows and Amazons	BBC One	UK	2016	1.5

Source: BARB

¹ Films with the highest average audience (individuals aged 4+) for a single transmission, excludes repeats of the same title.

[#] Film made with independent (non-studio) US support or with the independent arm of a US studio.

FILM ON MULTI-CHANNEL TELEVISION

In 2018, multi-channel television (Freeview/satellite/cable) accounted for 62% of all viewings of film on television. For the purposes of this section, multi-channel television includes all free-to-air and paid (non-film subscription) channels, with the exclusion of the traditional terrestrial channels.

Table 12 shows the number of film transmissions, the average film audience, the top film transmission and the audience for the top film, for channels which broadcast 30 or more feature films in 2018. After dedicated film channels Talking Pictures (3,483 transmissions), TCM (2,992), Film4 (2,804), Sony Max (2,211) and Colors Cineplex (1,898), the greatest numbers of titles were screened by London Live and 5Spike with 1,713 and 1,632 transmissions respectively. However, the largest average audiences for film were generated by ITV2 (368,000) and E4 (258,000).

In total, 5,385 unique film titles were screened on multi-channel television in 2018 across 30,684 slots, compared with 5,147 unique titles across 27,747 slots in 2017.

Table 12 Feature film on multi-channel television, 2018

Channel	Number of films broadcast	Average audience for all films (000)	Top film transmission	Audience for top film (000) *
Talking Pictures	3,483	33	Twice Round the Daffodils	174
TCM	2,992	18	The Goonies	114
Film4	2,804	167	Kingsman: The Secret Service	1,015
Sony MAX	2,211	2	Tiger Zinda Hai	71
Colors Cineplex	1,898	2	Padmaawat	61
London Live	1,713	6	The Medusa Touch	77
5Spike	1,632	71	The Guns of Navarone	353
5STAR	1,511	95	Batman Begins	372
ITV4	1,460	148	Battle of Britain	580
Zee Cinema	1,294	2	Karma (1986)	28
Syfy	1,129	37	Matilda	191
SAB TV	1,020	2	Ek Tha Tiger	46
ITV2	995	368	Jurassic World	1,438
Paramount Network	792	28	War of the Worlds (2005)	208
Star Gold	583	2	Housefull 2	34
Comedy Central	399	75	Pirates of the Caribbean: The Curse of the Black Pearl	226
Horror Channel	366	52	Hannibal Rising	186
E4	323	258	Captain America: The First Avenger	694
Zing	303	2	Hum Saath Saath Hain	14
AMC	294	1	The Duff	28
&TV	187	3	Dil	34
Universal	162	64	How the Grinch Stole Christmas	184
Comedy Central Extra	143	11	Kevin & Perry Go Large	60
ITV3	124	185	The Wizard of Oz	533
Zee TV	116	4	Tamasha	23
Sky One	115	143	The Greatest Showman	1,290

Source: BARB, RSU analysis

Notes:

Excludes channels with <30 separate film titles broadcast during 2018.

* Film with the highest average audience (individuals aged 4+) for a single transmission, excludes repeats of the same title.

As Table 13 shows, *Jurassic World* achieved the year's highest average audience for a single transmission across multi-channel television in 2018, with 1.4 million viewers for its Christmas Day broadcast on ITV2. (The film was also the year's most viewed film overall on the platform with a combined audience of 9.4 million viewers across six transmissions.) As in previous years, titles shown on ITV2 dominate the chart of most popular multi-channel film broadcasts, including four outings from two of the broadcaster's schedule stalwarts, the James Bond and Star Wars franchises.

Five of the top 10 films were UK qualifying features, and all were produced in collaboration with the major US studios.

Table 13 Top 10 films¹ on multi-channel television, 2018

Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1 Jurassic World	ITV2	USA	2015	1.4
2 Elf	ITV2	USA	2003	1.4
3 The Greatest Showman	Sky One	USA	2017	1.3
4 Star Wars: Episode IV - A New Hope	ITV2	UK/USA	1977	1.1
5 SPECTRE	ITV2	UK/USA	2015	1.0
6 Kingsman: The Secret Service	Film4	UK/USA	2014	1.0
7 How the Grinch Stole Christmas	ITV2	USA	2000	1.0
8 Mechanic: Resurrection	Film4	Fra/USA	2016	0.9
9 Skyfall	ITV2	UK/USA	2012	0.9
10 Star Wars: Episode VI - Return of the Jedi	ITV2	UK/USA	1983	0.9

Source: BARB, BFI RSU analysis

¹ Films with the highest average audience (individuals aged 4+) for a single transmission, excludes repeats of the same title.

In 2018, pay TV film channels accounted for 14% of all viewings of film on television. Table 14 shows the top 10 films, ranked by highest average audience for a single transmission on the additional TV film channels operated by Sky in 2018. These channels broadcast 1,627 unique titles across 36,050 slots during the year, with an average audience of 10,000. In 2017, there were 1,623 unique titles across 44,780 slots with an average audience of 12,000.

All of the top 10 films were Sky Cinema Premiere transmissions. *Jumanji: Welcome to the Jungle* achieved the highest single audience with 1.9 million viewers for a daytime slot in August. There are two UK qualifying films in the list: the UK independent film *Monster Family* and the studio-backed title *Justice League*. As in 2017, the Disney animation *Moana* (which does not feature in the list) gained the largest cumulative audience on pay TV, with 5.7 million viewers over 77 transmissions on Sky Cinema Disney.

Table 14 Top 10 films¹ on pay TV film channels, 2018

Title	Country of origin	Year of theatrical release	Audience (million)
1 Jumanji: Welcome to the Jungle	USA	2017	1.9
2 The Greatest Showman	USA	2017	1.7
3 Monster Family	UK/Ger	2018	1.7
4 Peter Rabbit	Aus/USA	2018	1.6
5 Despicable Me 3	USA/Fra	2017	1.6
6 Thor: Ragnarok	USA	2017	1.4
7 Kong: Skull Island	USA/Chn	2017	1.4
8 Black Panther	USA	2018	1.2
9 Justice League	UK/USA/Can	2017	1.2
10 The Emoji Movie	USA	2017	1.2

Source: BARB, BFI RSU Analysis

¹ Films with the highest average audience (individuals aged 4+) for a single transmission, excludes repeats of the same title.

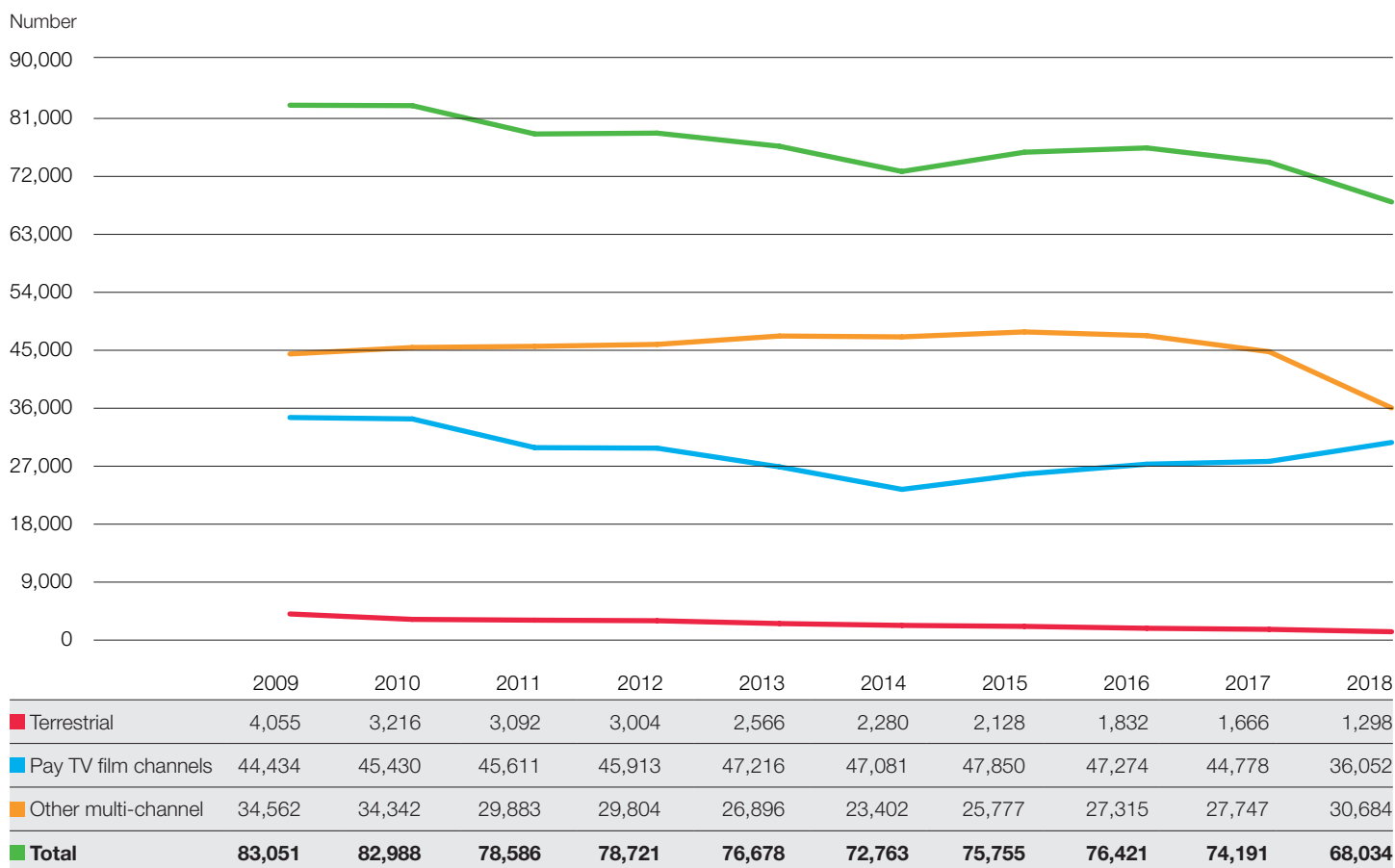


Image: Jumanji: Welcome to the Jungle © 2016 CTMG. All Rights Reserved

FILM BROADCASTS AND AUDIENCE FOR FILM ON ALL TELEVISION CHANNELS, 2009-2018

As Figure 13 shows, fewer films were shown on UK television (not including pay-per-view) in 2018 than in any other year in the period, 2009-2018. There were a total of 68,304 film transmissions in 2018, down from 74,191 in 2017, while the number of unique film titles dropped from 7,151 in 2017 to 7,100. The greatest number of unique film titles available to audiences in 2018 was shown on multi-channel television (5,385). Pay TV channels showed 1,623 unique titles while terrestrial channels screened 1,093 titles. (The overall total for 2018 is less than the sum of these categories, as some titles were shown on multiple platforms across the year.)

Figure 13 Total number of film transmissions on television (except pay-per-view), 2009-2018



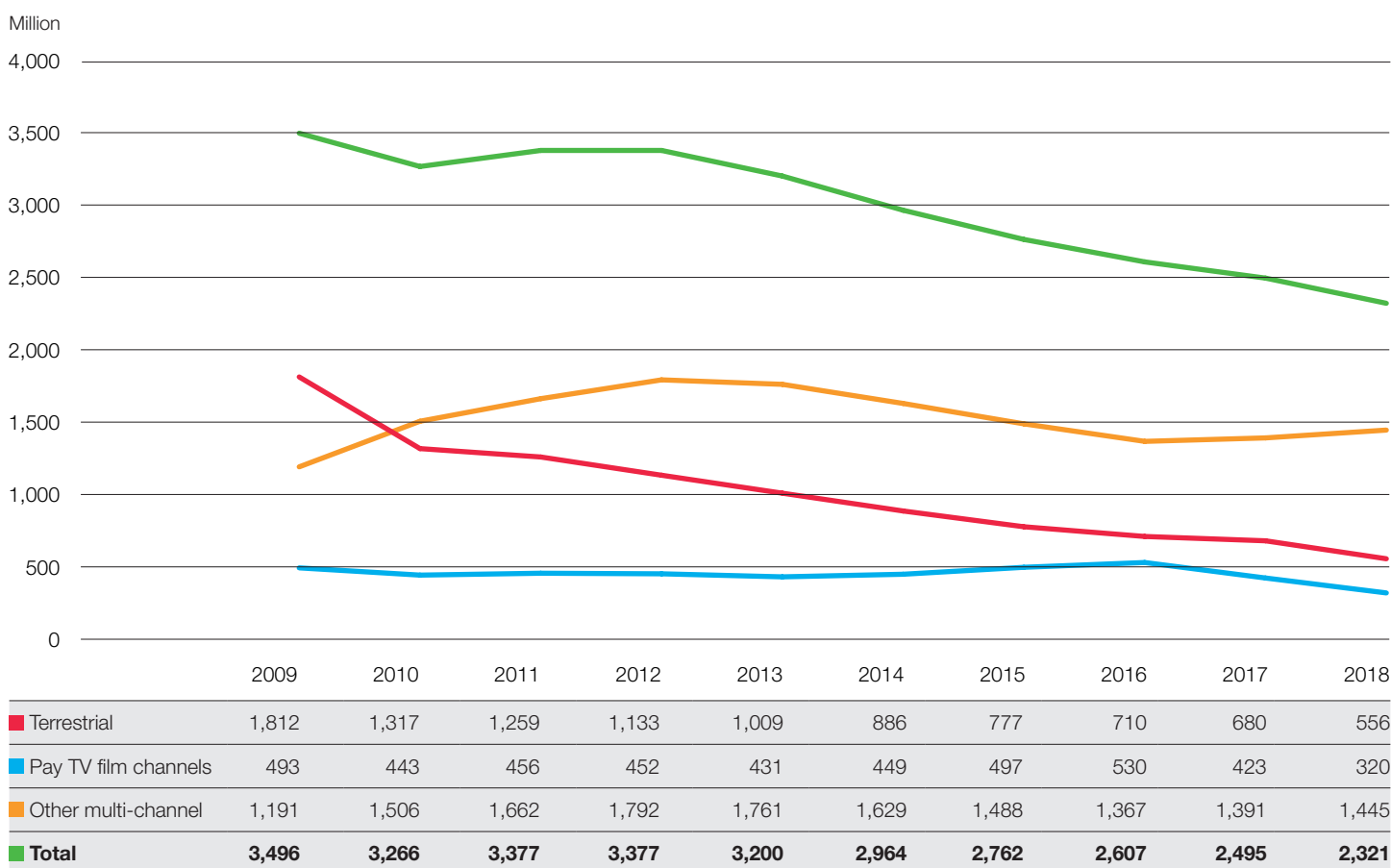
Source: BFI RSU Analysis, BARB

Note: Figures for 2009-2017 have been revised since publication of the 2018 Statistical Yearbook.

In 2018, there were 2.3 billion viewings of film on television in the UK (not including pay-per-view) which represents approximately 53 film viewings per person per year, down from 58 in 2017 (Figure 14). In line with the overall trend for the 10 years shown in the chart, in 2018, audience numbers increased for multi-channel television platforms compared with 2017, but decreased for terrestrial and pay TV channels. Multi-channel film broadcasts attracted the largest audience overall in 2018 (1.4 billion viewers) while pay TV channels dedicated to film had the smallest total audience with 320 million viewers.

Across the 10-year period 2009-2018, the audience for film on television declined by 34%.

Figure 14 Total audience for film on television (except pay-per-view), 2009-2018



Source: BARB, BFI RSU analysis

Notes:

Audience numbers are based on total viewing sessions of 30 minutes+ of consecutive film watching.

Figures for 2009-2017 have been revised since publication of the 2018 Statistical Yearbook.

Figures may not sum to totals due to rounding.

THE VALUE OF FEATURE FILM TO BROADCASTERS

We estimate the value of feature film to UK broadcasters to have been approximately £894 million in 2018, up slightly from £880 million in 2017 (the 2017 value has been updated since publication of the 2018 Statistical Yearbook). Of this it is estimated that £134 million is attributable to UK films (£142 million in 2017). Television values are based on a model developed by Ampere Analysis. Values are estimated by dividing broadcaster revenues (from subscriptions, advertising spend and licence fee share) by the percentage of content spend attributed to film.



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