BFI
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ENTERTAINMENT

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Cover image: *Pirates of the Caribbean: Salazar's Revenge* © Disney Enterprises, Inc. All Rights Reserved

FACTS IN FOCUS

VALUE OF FILM ON PHYSICAL VIDEO

Sales in 2017

£503 million

Down 15% on 2016

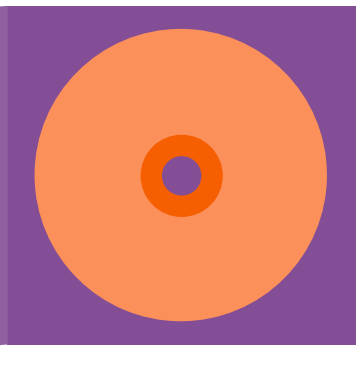
Rentals in 2017

£37 million

Down 23% on 2016

TOP FILM ON DVD AND BLU-RAY

The UK studio backed title **Beauty and the Beast** was the most popular physical video purchase in 2017



VALUE OF DIGITAL VIDEO

Subscription Video on Demand (SVoD), Video on Demand (VoD) rental and Electronic Sell Through (EST)

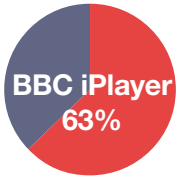
UP 18% on 2016

£681million

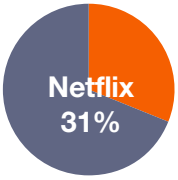
DIGITAL VIDEO PLATFORMS

% reach (UK adults) of the UK's top VoD services in 2017

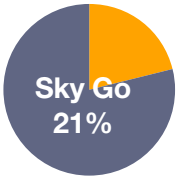
Top free/advert supported platform



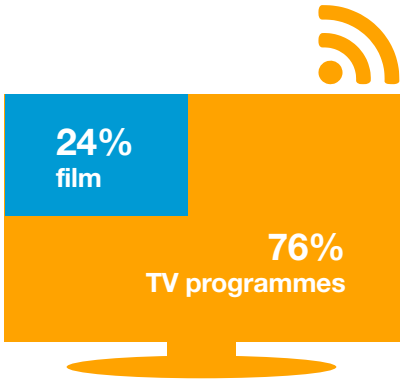
Top OTT SVoD platform



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

TOP FILM ON SVoD

The UK independent title **The King's Speech** was the most viewed film of the year across the top three SVoD platforms (Netflix, Amazon Prime and Now TV)

FILM ON TELEVISION

In total, there were **3.7 billion** viewings of film on UK television in the year.

The value of feature film to UK broadcasters in 2017 was **£861m**

Of which **£142m** was attributable to UK films

TOP FILM ON TELEVISION

The US studio title **Jurassic World** achieved the largest single audience on a terrestrial television channel attracting **6.3 million** viewers

HOME ENTERTAINMENT

FILM ON PHYSICAL VIDEO

Despite falling revenues, particularly in the rental market, physical video remains an important element of the film value chain illustrating that audiences for film still appreciate 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 (formerly the British Video Association); it does not include downloads which are discussed in the digital video section below.

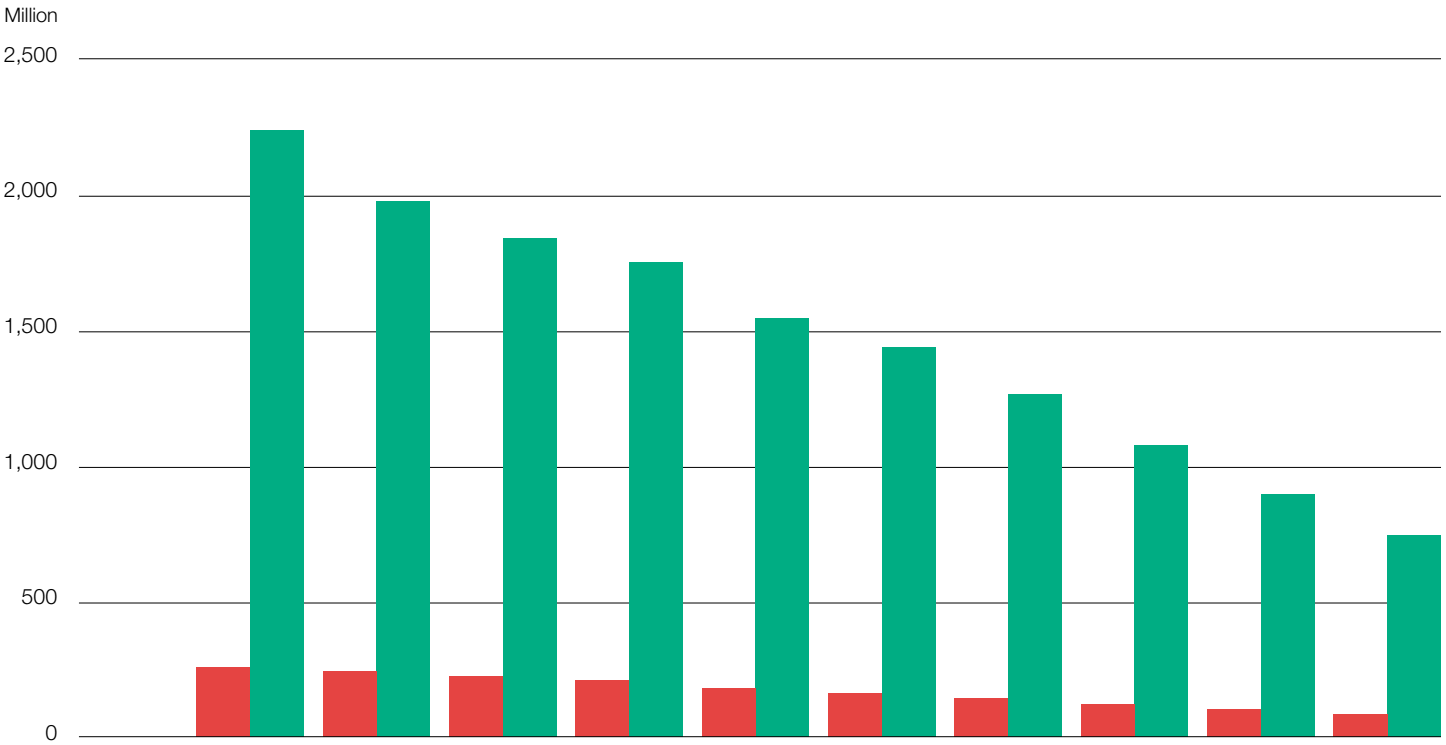
FILM IN THE PHYSICAL VIDEO RETAIL MARKET

As Figure 1 shows, the volume and value of physical video sales in all categories in the UK have declined each year between 2008 and 2017. (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.)

In 2017, 83 million videos were sold in the UK (down 18% compared with 2016) with a total market value of £742 million (down 17% compared with 2016). DVDs accounted for the majority of video sales (78% by value and 86% by volume), while Blu-ray disc purchases accounted for 22% of sales by value and 14% of sales by volume.

Feature film represented approximately 68% of the physical sell-through market by value (£503 million) and 75% by volume (62 million units) in 2017. UK films accounted for around 34% of sales by value (an increase from 33% in 2016) and 31% of sales by volume (the same as in 2016).

Figure 1 Retail video sales (all categories), 2008-2017



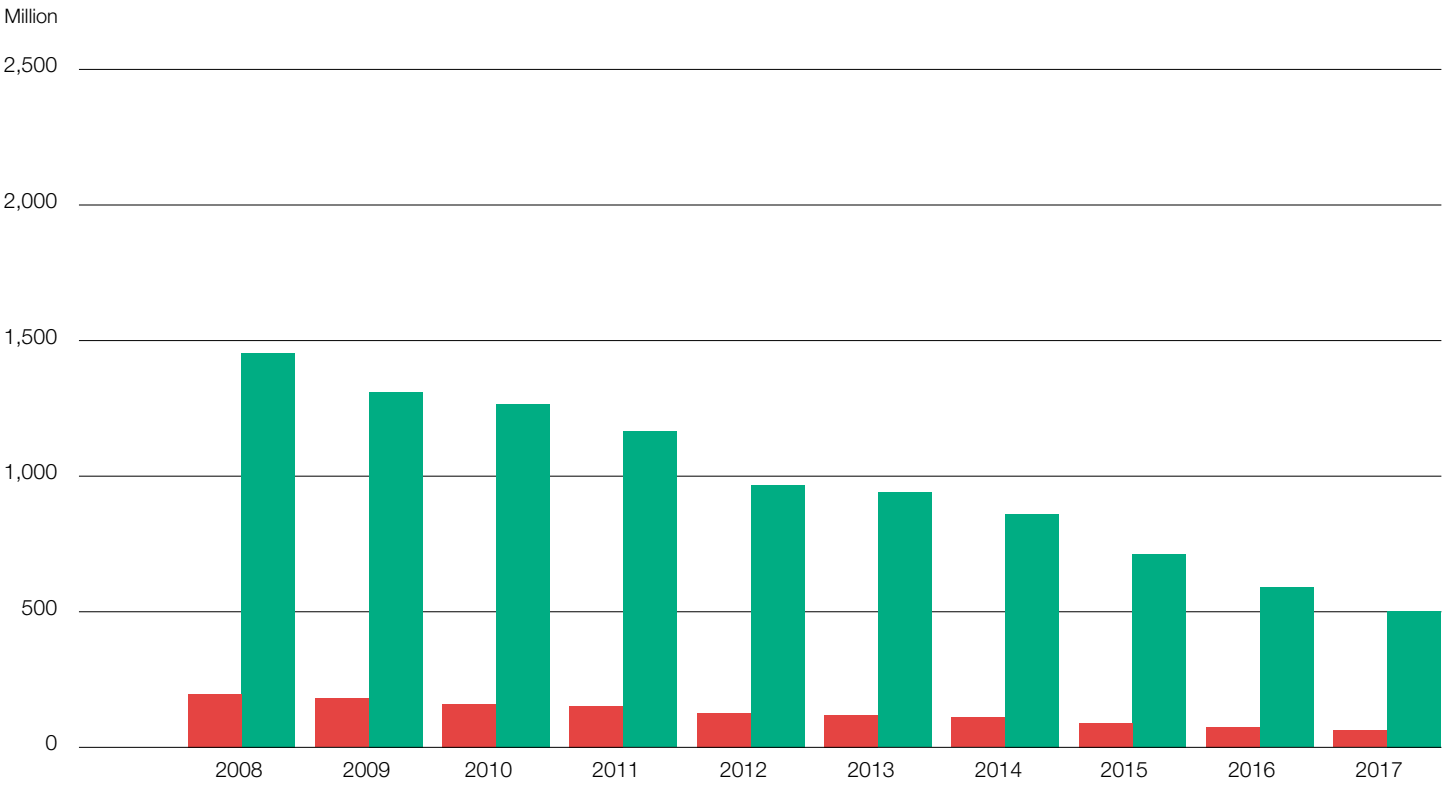
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Volume (million)	257	243	223	207	179	162	143	120	101	83
Value (£ million)	2,237	1,975	1,839	1,749	1,543	1,438	1,264	1,075	894	742

Source: BASE, IHS

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 2008 and 2017 mirrors that of the overall physical sell-through market. The number of videos sold decreased each year during the decade, falling from 196 million units in 2008 to 62 million units in 2017, while the value of sales fell from £1.5 billion in 2008 to just over £500 million in 2017.

Figure 2 Film on physical video retail sales, 2008-2017



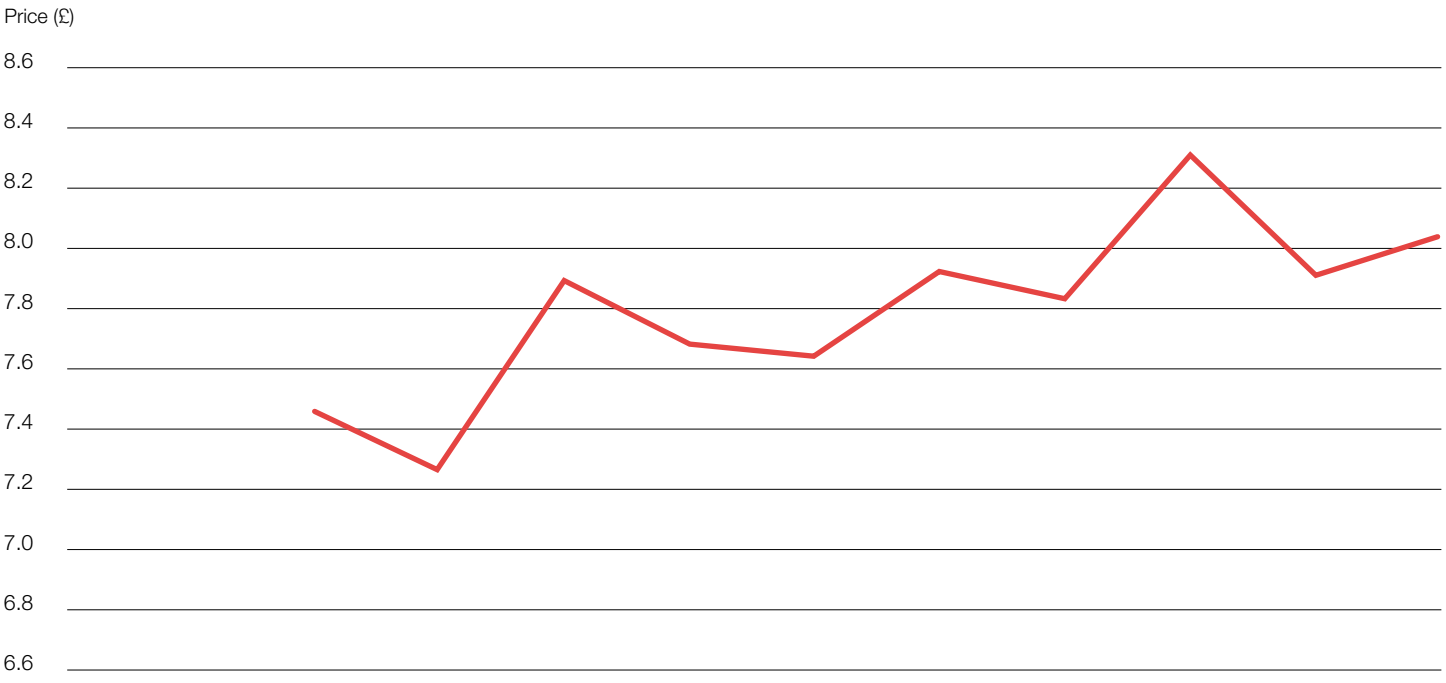
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Volume (million)	196	180	160	152	127	119	110	89	75	62
Value (£ million)	1,454	1,311	1,267	1,165	968	940	861	712	589	503

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 the average unit price for film on physical video formats between 2008 and 2017. There has been on overall upward trend over the decade, with average prices rising from £7.42 in 2008 to £8.06 in 2017. The lowest average price per unit over the period was recorded in 2009 (£7.29), while the highest was achieved in 2015 (£8.36).

Figure 3 Average retail price of film per unit, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Price (£)	7.42	7.29	7.90	7.64	7.62	7.93	7.83	8.36	7.91	8.06

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

Figure 4 shows that the most popular genre on sell-through video in 2017 was action/adventure, which accounted for 18% of the market (21% in 2016). Sci-fi was the next most popular with 16.5% of sales, followed by animation with 14.5%. (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, 2017

Genre	%
Action/adventure	18.3
Sci-fi	16.5
Animation	14.5
Drama	11.1
Child/family	10.7
Comedy	8.9
Thriller	5.1
Horror	4.4
War	3.8
Musical	1.7
Fitness	1.3
Western	1.1
Documentary	0.9
Anime	0.8
Sport/health	0.8
Adult	0.1
Bollywood	<0.1
Other	<0.1

Source: Official Charts Company, BASE

Note: These genres are assigned by BASE; the categories are not the same as those in the Film at the cinema chapter.

TOP FILMS ON PHYSICAL VIDEO

Table 1 shows the top 10 best-selling films on physical video in 2017. The list is headed by *Beauty and the Beast*, the second highest grossing film at the UK and Republic of Ireland box office in 2017. Half of the top 10 titles were released theatrically in 2017 and the remaining five were released in 2016. All five 2017 releases were among the year's top 20 highest box office earners. There are five UK films in the list, all of which were made in collaboration with the major US studios.

Table 1 Top 10 best-selling films on physical video formats, 2017

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Beauty and the Beast	UK/USA	2017	Walt Disney
2	Rogue One: A Star Wars Story	UK/USA	2016	Walt Disney
3	Fantastic Beasts and Where to Find Them	UK/USA	2016	Warner Bros
4	Moana	USA	2016	Walt Disney
5	Bridget Jones's Baby	UK/USA/Fra	2016	Universal
6	Guardians of the Galaxy: Vol 2	USA/NZ/Can	2017	Walt Disney
7	Dunkirk	UK/USA	2017	Warner Bros
8	Trolls	USA	2016	Dreamworks
9	Sing	USA/Jpn	2017	Universal
10	Despicable Me 3	USA	2017	Universal

Source: Official Charts Company

The top 10 UK qualifying films on physical video in 2017 include five titles which are also in the overall top 10 films on video for the year (Table 2). As with the previous table, half of the top 10 titles were released theatrically in 2017 and the remaining five were released in 2016. Two of the 2017 releases (*Beauty and the Beast* and *Dunkirk*) were among the year's top 20 best performing films at the UK box office. *T2 Trainspotting* is the only independent UK film in the list.

Table 2 Top 10 best-selling UK qualifying films on physical video formats, 2017

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Beauty and the Beast	UK/USA	2017	Walt Disney
2	Rogue One: A Star Wars Story	UK/USA	2016	Walt Disney
3	Fantastic Beasts and Where to Find Them	UK/USA	2016	Warner Bros
4	Bridget Jones's Baby	UK/USA/Fra	2016	Universal
5	Dunkirk	UK/USA	2017	Warner Bros
6	Doctor Strange	UK/USA	2016	Walt Disney
7	Wonder Woman	UK/USA/HK/Chn	2017	Warner Bros
8	Pirates of the Caribbean: Salazar's Revenge	UK/USA	2017	Walt Disney
9	T2 Trainspotting	UK/USA#	2017	Sony
10	Miss Peregrine's Home for Peculiar Children	UK/USA	2016	20th Century Fox

Source: BFI RSU analysis of Official Charts Company data

Film made with independent (non-studio) US support.

The top 10 best-selling UK independent films on video in 2017 include one title that appears in the previous two tables: *T2 Trainspotting*. The film was the second highest earning UK independent film at the UK box office in 2017 and is one of four titles in the list released theatrically in 2017. The oldest title in the list is the original *Trainspotting* which was first released in UK cinemas in 1996.

Two of the titles in the list have appeared in previous top 10s: *Paddington* features in the list for a third consecutive year, while *Legend* features for a second consecutive year. The list contains one non-fiction title, *Kenny*, the year's best-selling feature documentary on video.

Table 3 Top 10 best-selling UK independent films on physical video formats, 2017

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	T2 Trainspotting	UK/USA#	2017	Sony
2	Paddington	UK/Fra	2014	StudioCanal
3	A Street Cat Named Bob	UK	2016	Sony
4	Trainspotting	UK	1996	FilmFour
5	Baby Driver	UK/USA#	2017	Sony
6	The Hatton Garden Job	UK	2016	Signature Entertainment
7	I, Daniel Blake	UK/Fra/Bel	2016	eOne Films
8	Legend	UK/Fra/USA#	2015	StudioCanal
9	Kenny	UK	2017	Spirit Entertainment
10	Their Finest	UK	2017	Lionsgate

Source: BFI RSU analysis of Official Charts Company data

Film made with independent (non-studio) US support.

As Table 4 shows, all of the top 10 best-selling feature documentaries on physical video in 2017 were films about sport or sports personalities. (This list does not include documentaries which are based on music concerts.) The table is headed by *Kenny*, a biography of Kenny Dalglish, who played for and managed Liverpool FC over three decades. There are three other football-related films in the list: *89*, a film about Arsenal's odds-defying 1989 championship title win over Liverpool, *Best* and *Bobby*, respectively biographies of footballers George Best and Bobby Moore. While five of the six remaining titles centre on male sporting personalities in the worlds of mixed martial arts (*Conor McGregor: Notorious*), Formula One (*McLaren, Williams*), bare-knuckle fighting (*The Guv'nor*) and motorcycle road racing (*Road*), one title tells the story of a 13-year-old Mongolian girl's attempt to become the first female eagle hunter in 12 generations of her family (*The Eagle Huntress*).

Three of the films in the list also appeared in the 2016 top 10 list: *The Guv'nor, Road* and *Bobby*. Eight of the top 10 documentaries are UK films.

Table 4 Top 10 best-selling documentary films on physical video formats, 2017

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Kenny	UK	2017	Spirit Entertainment
2	Conor McGregor: Notorious	Ire	2017	Universal
3	89	UK	2017	Universal
4	McLaren	NZ	2017	Universal
5	Williams	UK	2017	Curzon Artificial Eye
6	The Guv'nor	UK	2016	Lionsgate
7	Best (George Best - All by Himself)	UK	2017	Dogwoof
8	The Eagle Huntress	UK/Mongolia/USA	2016	Altitude
9	Road	UK/Ire	2014	Kaleidoscope
10	Bobby	UK	2016	eOne Films

Source: BFI RSU analysis of Official Charts Company data

Note: Titles based on music concerts are not included.

Films from East Asia accounted for seven of the top 10 best-selling foreign language films on video in 2017. The list is headed by the South Korean WWII epic *Operation Chromite* (in Korean and English) which features Liam Neeson as General Douglas MacArthur. There are two other South Korean titles in the list: the zombie horror film *Train to Busan*, the highest earning film at the South Korean box office in 2016, and *The Handmaiden*, which won the BAFTA award for best foreign language film in 2018. Four of the films in the top 10 are Japanese, all of which are animations. The highest earning Japanese title in the list is Makoto Shinkai's *Your Name*, which is globally the highest earning anime film of all time.

Two of the titles have featured in the top 10 in previous years: *My Neighbour Totoro* appears in the top 10 for a third consecutive year, while *When Marnie Was There* appears for a second consecutive year.

Table 5 Top 10 best-selling foreign language films on physical video formats, 2017

Rank	Title	Country of origin	Year of theatrical release	Distributor
1	Operation Chromite	S.Kor	2016	Signature Entertainment
2	Your Name	Jpn	2016	Anime
3	Guardians	Rus	2017	4Digital Media
4	Train to Busan	S.Kor	2016	StudioCanal
5	The Handmaiden	S.Kor	2017	Curzon Artificial Eye
6	My Neighbour Totoro	Jpn	1988	StudioCanal
7	Yu-Gi-Oh!: The Dark Side of Dimensions	Jpn	2017	Manga
8	When Marnie Was There	Jpn	2016	StudioCanal
9	The Butcher of Prague	Cze/Slk	2011*	Lightning Pictures
10	William the Conqueror	Fra	2017*	Precision Pictures

Source: BFI RSU analysis of Official Charts Company data

* *The Butcher of Prague* and *William the Conqueror* were not released theatrically in the UK; the theatrical release year refers to the first release in any global territory.

Classic and archive titles also remain popular video purchases, due in part to theatrical re-releases or other events associated with the films. The year's highest video sales for any film over 10 years old were achieved by Danny Boyle's 1996 cult classic *Trainspotting*, due largely to the interest generated by the theatrical release of its sequel *T2 Trainspotting*. In addition, the Walt Disney animations *Beauty and the Beast, Cinderella, The Jungle Book, The Lion King, The Little Mermaid* and *Snow White and the Seven Dwarfs* all sold well on video in 2017, helped in part by a prolonged promotion with major retailers and also, in the case of *Beauty and the Beast*, by the successful theatrical release of a live action remake.

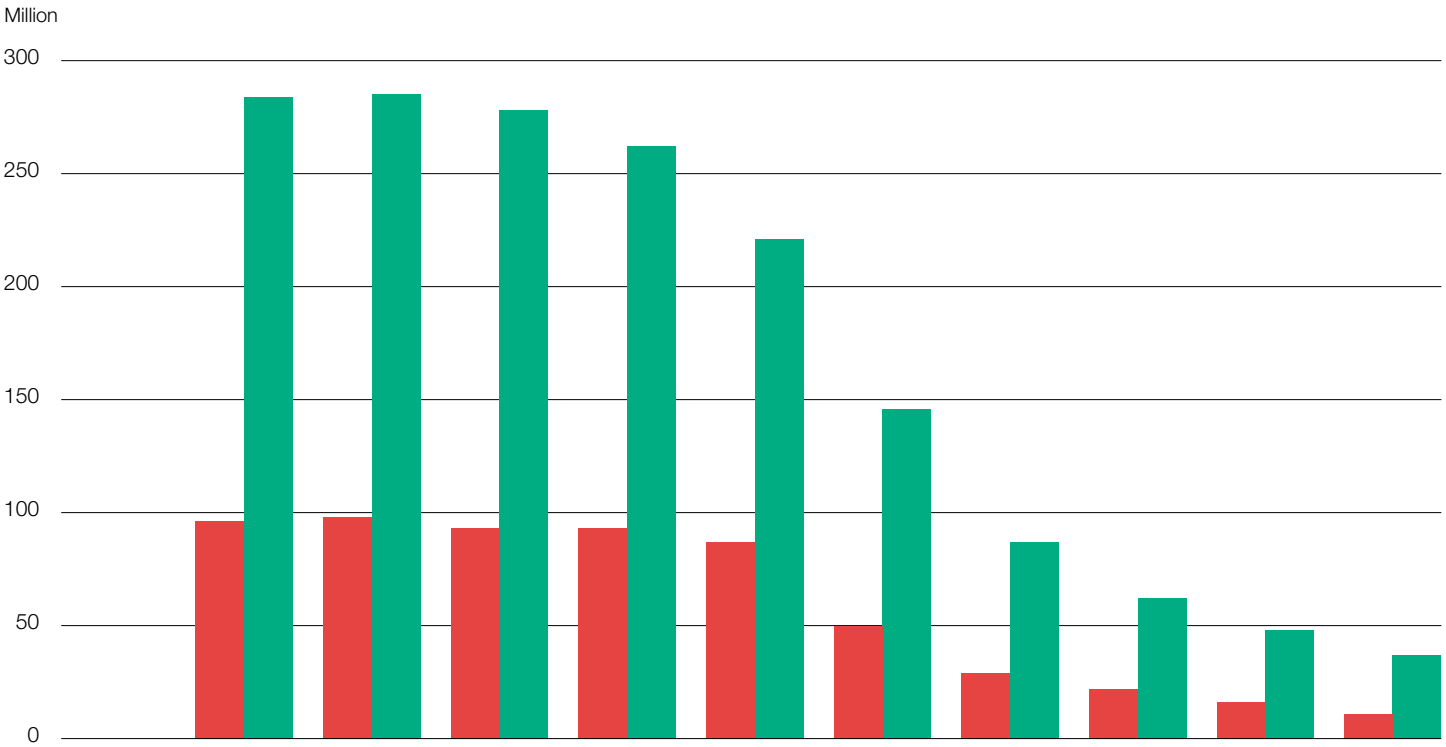
Image: *T2 Trainspotting* © Tristar Productions, Inc 2017. Courtesy of Sony Pictures

FILM IN THE PHYSICAL VIDEO RENTAL MARKET

As with the sell-through market, there has been a downward trend in physical video rentals over the 10-year period 2008-2017 (Figure 5). At £37 million, the value of the market in 2017 was nearly six times lower than in 2008 (£284 million), while rental transactions were down 31% from 16 million in 2016 to 11 million in 2017. The decrease in the market's value over the decade is due mainly to competition from multi-channel television and digital video services such as Netflix, Amazon Prime and Google Play.

The average price of a physical video rental in 2017 was £3.33, and online renting of physical discs (with postal delivery) accounted for 82% of rental transactions.[1] (In October 2017, Lovefilm, the UK's largest physical disc rental operator ceased its rental by post system.) Data produced by Kantar for BASE shows that the rental market is increasingly driven by male consumers (75%) and older age groups, with only 1% of 20-24 year olds in 2017 renting a physical video compared to 17% of 45-54 year olds and 16% of 55-64 year olds.

Figure 5 Film on physical video rental market, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Transactions (million)	96	98	93	93	87	50	29	22	16	11
Value (£ million)	284	285	278	262	221	146	87	62	48	37

Source: IHS, BASE

[1]Due to declining volumes, information on the top 10 online film video rentals and a breakdown of rentals by genre are not available.

FILM ON DIGITAL VIDEO

Digital video has revolutionised the ways in which audiences can access film by making content available through a range of devices, anytime, anywhere. The sector has grown rapidly in recent years and is now firmly established as a major contributor to the UK film economy.

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 provides unlimited access to content for a fixed monthly sum – providers include Netflix, Amazon Prime Video and Now TV
- Free/advert-supported – providers include YouTube (excluding YouTube Premium) and catch-up services from the major broadcasters such as BBC iPlayer and ITV Hub.

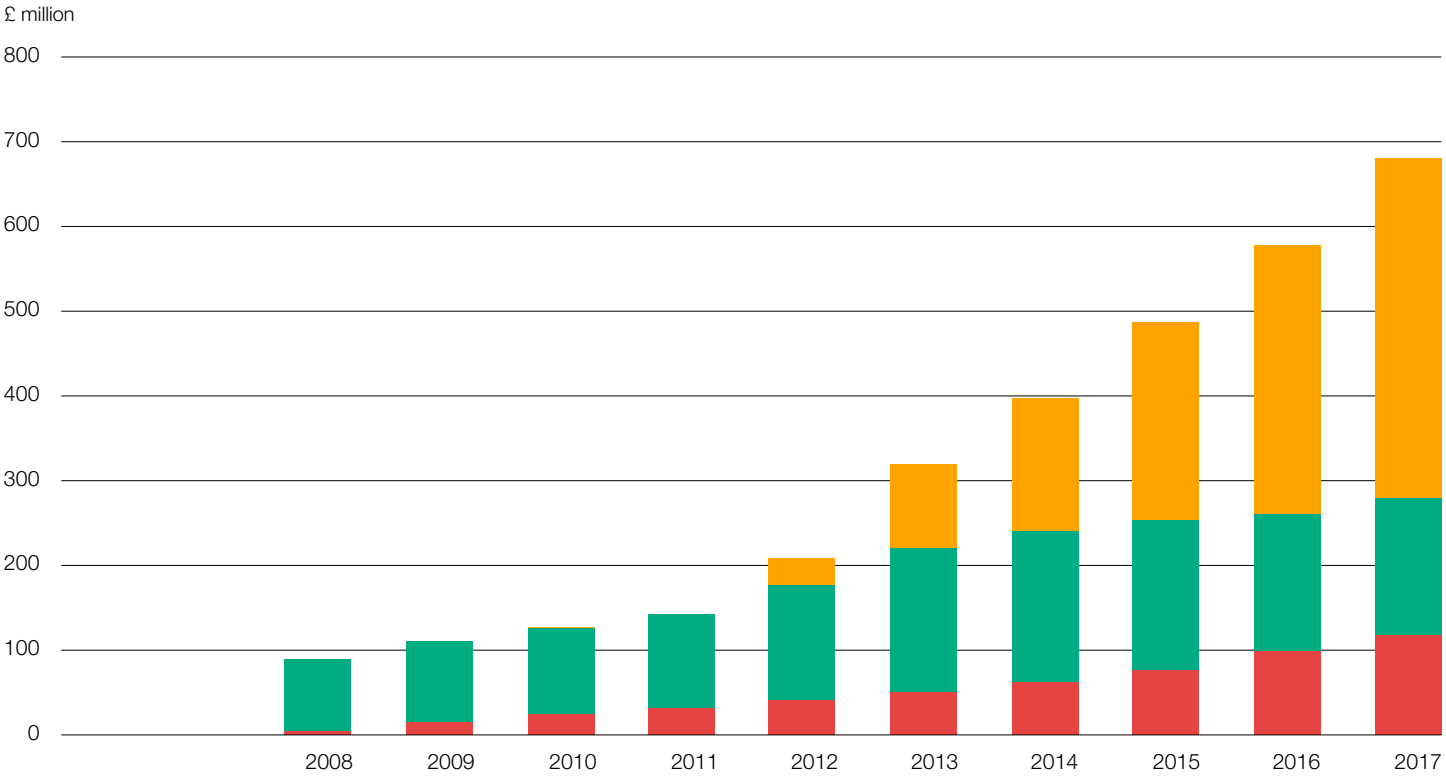
VALUE OF FILM ON DIGITAL VIDEO

According to IHS, the estimated value of the on-demand market for film in the UK in 2017 was £681 million, an increase of 18% compared with 2016 and more than seven times the value in 2008 (Figure 6). In previous editions of the Yearbook we have presented separate values for television-based and online digital video revenues but these are no longer disaggregated.

In 2017, revenues from SVoD platforms are estimated to have been £402 million, an increase of 26% compared with 2016 (£318 million). Overall TVoD revenues were also up compared with 2016 but only due to increases in retail sales: EST revenues in 2017 are estimated to have been £118 million, up 20% compared with 2016 (£98 million), while revenues from rental VoD services are estimated at £161 million, a slight drop from £162 million in 2016. (Revenues from SVoD services have been greater than those of rental VoD since 2015.)

The value of the overall on-demand film market represented approximately 20% of the total UK filmed entertainment market in 2017, an increase of three percentage points on the previous year. For the first time, digital video revenues overtook those of physical video (see Film on physical video section above).

Figure 6 Estimated value of the digital video film market in the UK, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
EST	4	15	24	31	41	50	62	76	98	118
VoD (rental)	85	95	102	111	135	170	179	178	162	161
SVoD (subscription)	-	-	1	1	32	100	156	233	318	402
Total	**89**	**110**	**127**	**142**	**208**	**320**	**397**	**487**	**578**	**681**

Source: IHS

Notes:

IHS estimates for 2008-2016 have been revised due to improved visibility on transactions and revenues.

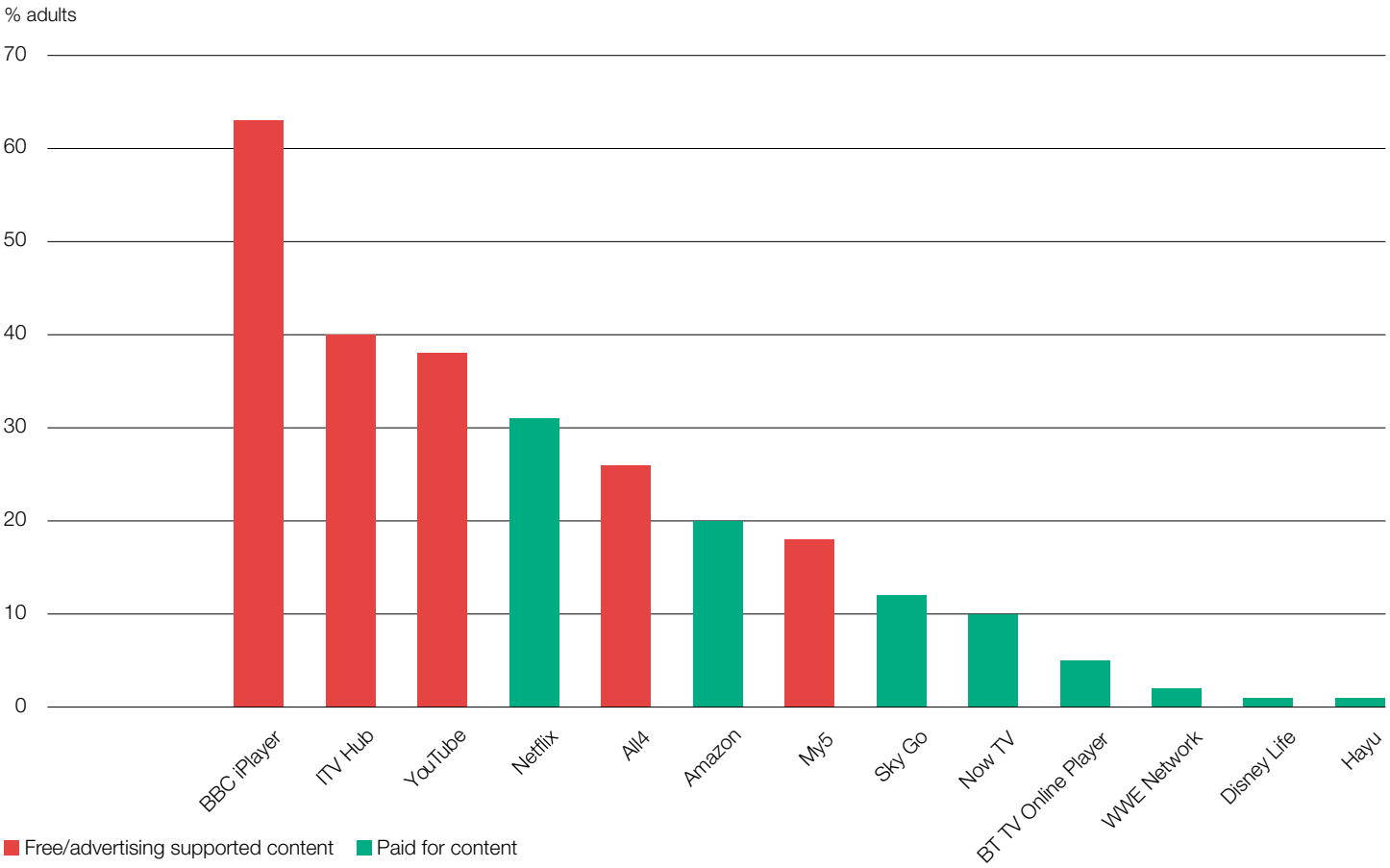
Estimates include both television-based and online digital video revenues.

Figures may not sum to totals due to rounding.

POPULARITY OF ON-DEMAND STREAMING SERVICES

According to Ofcom's *Communications Market Report*, amongst adults (16+), the top two most popular on-demand streaming services for film and television programmes in 2017 were the BBC iPlayer (used by 63%) and ITV Hub (40%) platforms offered by terrestrial broadcasters. Netflix (used by 31% of adults) was the most popular OTT SVoD service, while the pay TV platform Sky Go was used by 12% of UK adults (Figure 7).

Figure 7 Most popular on-demand streaming services for film and television programmes, 2017



Adults (16+) %	63	40	38	31	26	20	18	12	10	5	2	1	1

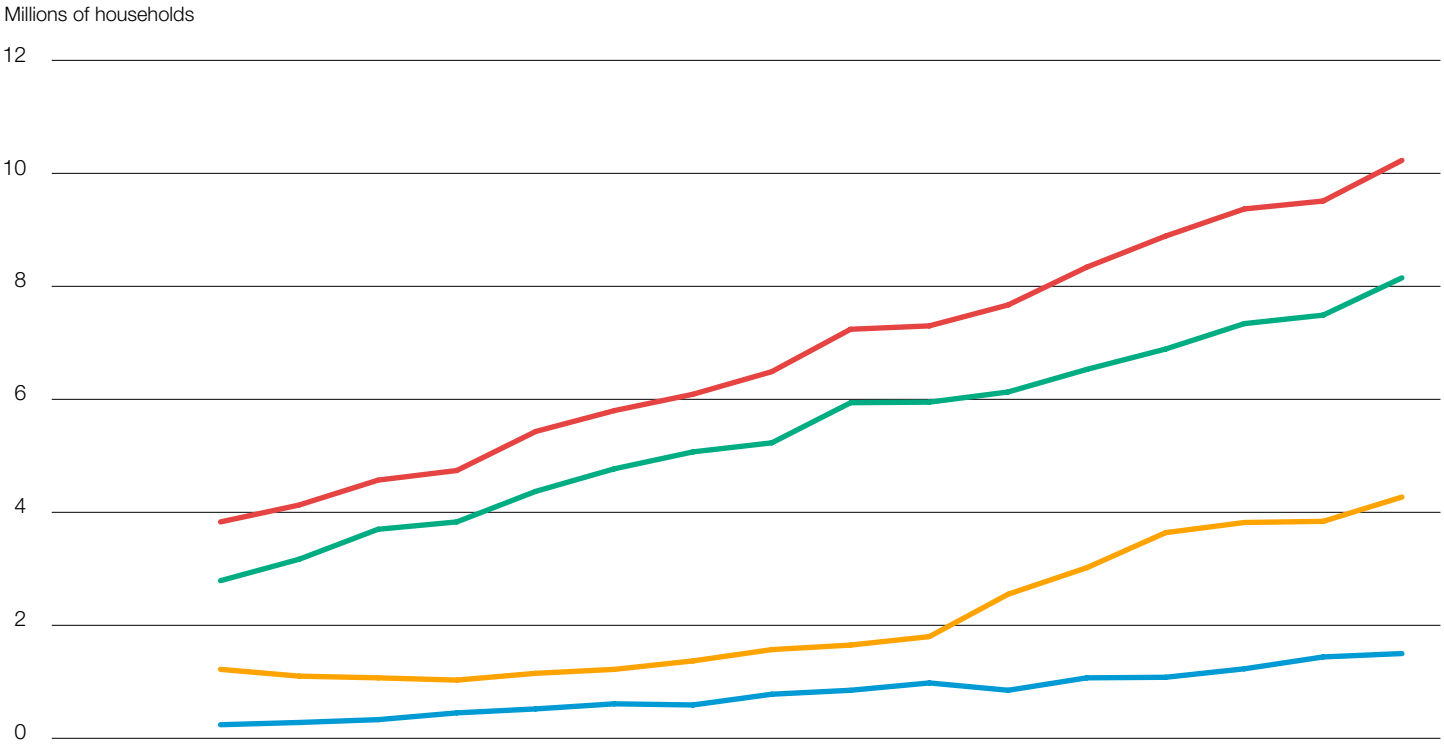
Source: Ofcom Communications Market Report, Consumption of VoD content CMR Research 2017 – Populus

Q: Thinking about when you watch TV programmes/films, do you use any of the following? n=2,356

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 3.8 million in Quarter 1, 2014 to 10.2 million in Q4, 2017, 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 Quarter 4, 2017, Netflix was available in 8.2 million UK homes, Amazon Prime Video in 4.3 million homes, and Now TV in 1.5 million homes. (For more on SVoD audiences, see the Audiences chapter.)

Figure 8 UK SVoD households, Q1 2014 – Q4 2017



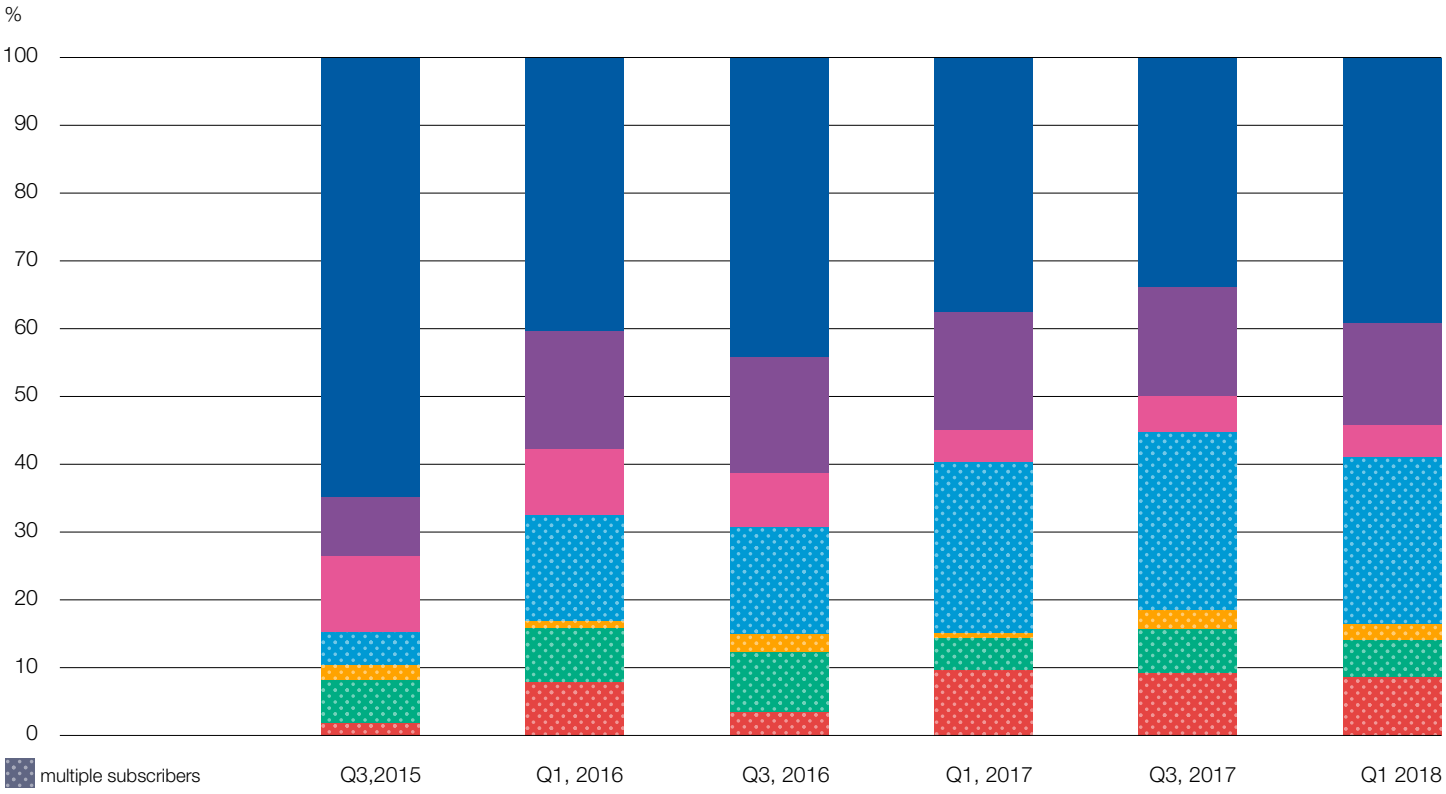
	Q1 2014	Q2 2014	Q3 2014	Q4 2014	Q1 2015	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q2 2016	Q3 2016	Q4 2016	Q1 2017	Q2 2017	Q3 2017	Q4 2017
Any SVoD	3.83	4.13	4.57	4.74	5.43	5.80	6.09	6.49	7.24	7.30	7.67	8.34	8.89	9.37	9.51	10.23
Netflix	2.79	3.17	3.70	3.83	4.37	4.77	5.07	5.23	5.94	5.95	6.13	6.53	6.89	7.34	7.49	8.15
Amazon	1.22	1.10	1.07	1.03	1.15	1.22	1.37	1.57	1.65	1.80	2.55	3.02	3.64	3.82	3.84	4.27
Now TV	0.24	0.28	0.33	0.45	0.52	0.61	0.59	0.78	0.85	0.98	0.85	1.07	1.08	1.23	1.44	1.50

Source: BARB Establishment Survey, RSU analysis

As the overall number of subscriptions to UK SVoD services have increased, so too have the number of households opting to sign up to more than one platform. According to BARB Establishment Survey data, by Quarter 1, 2018, 11.1 million households had access to one or more of the top three SVoD services, representing over 39% of all homes in the UK.

Figure 9 shows the overlap of services amongst subscribers to Amazon, Netflix and Now TV between 2015 and 2018. (This is the only data currently available on multiple subscriptions.) The most likely combination for households holding more than one subscription was Amazon and Netflix. The growth in dual – and even triple – subscriptions was particularly evident in Q1, 2017 which points to the impact of the launch of two UK-originated series during Q4, 2016 - *The Crown* on Netflix and *The Grand Tour* on Amazon. As the data shows, the proportion of subscriptions to both services increased by 10 percentage points compared with the pre-launch quarter (Q3, 2016).

Figure 9 UK SVoD subscriptions overlap, Amazon, Netflix and Now TV, 2015-2018



	Q3,2015	Q1, 2016	Q3, 2016	Q1, 2017	Q3, 2017	Q1 2018
Netflix, Amazon & Now TV	1.8	7.9	3.4	9.6	9.2	8.6
Now TV & Netflix	6.4	7.9	8.9	4.7	6.5	5.4
Amazon & Now TV	2.1	1.1	2.6	0.8	2.7	2.5
Amazon & Netflix	4.9	15.5	15.9	25.2	26.4	24.6
Now TV only	11.3	9.8	7.9	4.7	5.2	4.7
Amazon only	8.6	17.4	17.1	17.5	16.1	14.9
Netflix only	64.8	40.3	44.2	37.6	33.9	39.2

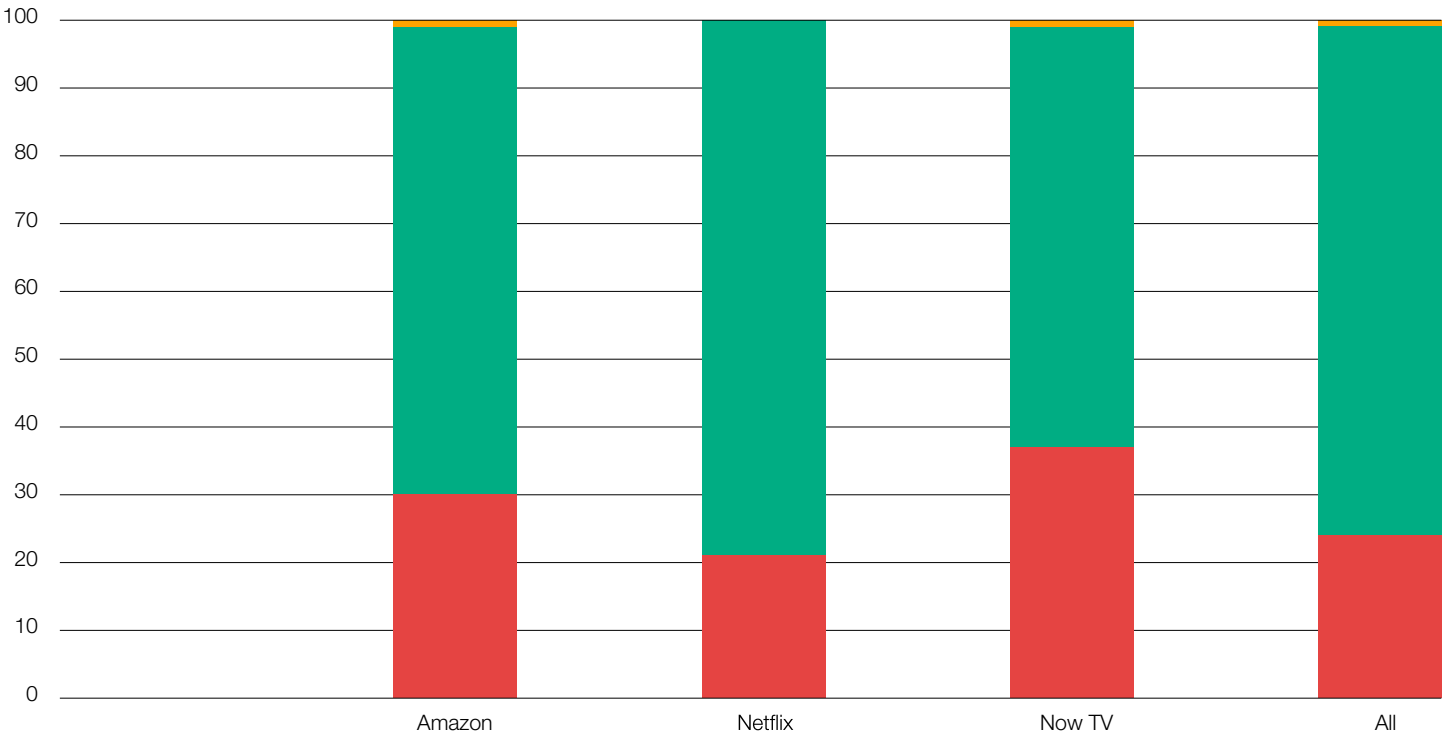
Source: Ampere Consumer, UK online survey. Base: 18+ (2,000) nationally representative

THE AUDIENCE FOR FILM ON SVoD

The provision of film content has been central to the on-demand offer. Figure 10 shows the share of viewing time devoted to film vs television programmes by subscribers to the three main SVoD platforms compared with all SVoD users. On average, subscribers to SVoD platforms in the UK 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 (37%) while Netflix subscribers spend the smallest (21%). It is interesting to note that when Now TV launched in 2012 it was a provider of exclusively film content.

Figure 10 Share of viewing by content on UK SvoD platforms, 2017

% of all minutes consumed



	Amazon	Netflix	Now TV	All
Film	30	21	37	24
TV series	69	79	62	75
Other TV	1	0	1	1

Source: GfK, UK SVoD Tracker, Calendar 2017, All adults 18+ who use SVoD platforms at least once every two weeks, Base: All (9,906), Amazon (5,554), Netflix (7,698), Now TV (2,225)

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 20 most popular films viewed on the three largest SVoD platforms in 2017. It should be noted, however, 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 *The King's Speech*, the all-time highest grossing UK independent film at the global box office, which was available on both Netflix and Amazon Prime. Interestingly, it is possible that the popularity of the film in 2017 may in part be due to Netflix's recommendation algorithms which are likely to have suggested the title to viewers of the platform's original series, *The Crown*, which was the fourth most viewed title on Netflix overall in the year. *The King's Speech* is the only UK independent film to feature in the list and is the oldest title (it was released in UK cinemas in 2011). The remaining top 20 films were all released theatrically between 2014 and 2016 with the exception of *Bright*, an original Netflix production, which was released directly on the platform in December 2017.

Table 6 Top 20 films viewed on leading UK SVoD platforms, 2017 (ranked by minutes consumed)

Rank	Title	% share of total film minutes consumed	Country of origin	Genre	Year of theatrical release
1	The King's Speech	1.0	UK	Drama	2011
2	Transformers: Age of Extinction	0.7	USA/Chn	Sci-fi	2014
3	London Has Fallen	0.7	UK/USA	Action	2016
4	Fast & Furious 7	0.6	USA/Jpn	Action	2015
5	Jurassic World	0.5	USA	Action	2015
6	John Wick	0.5	USA	Action	2015
7	Fifty Shades of Grey	0.4	USA	Drama	2015
8	The BFG	0.4	USA	Family	2016
9	Bright*	0.4	USA	Fantasy	-
10	Avengers: Age of Ultron	0.4	UK/USA	Action	2015
11	Interstellar	0.4	UK/USA	Sci-fi	2014
12	The Hunger Games: Mockingjay - Part 2	0.4	USA	Adventure	2015
13	Star Trek Into Darkness	0.3	USA	Sci-fi	2013
14	Divergent	0.3	USA	Action	2014
15	Moana	0.3	USA	Animation	2016
16	The Girl on the Train	0.3	USA	Thriller	2016
17	Minions	0.3	USA/Fra	Animation	2015
18	Guardians of the Galaxy	0.3	UK/USA	Action	2014
19	Gone Girl	0.3	USA	Drama	2014
20	Star Wars: The Force Awakens	0.3	UK/USA	Sci-fi	2015

Source: RSU, GfK, UK SVoD Tracker, Calendar 2017, claimed viewership on Amazon Prime, Netflix or Now TV
* Film was released directly on the Netflix platform without a prior cinema release.

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 over 7,000 unique film titles across all channels in 2017, and the cumulative film audience was over 3.7 billion.

PROGRAMMING ON THE TERRESTRIAL CHANNELS

Table 7 shows the total number of feature films broadcast on the five terrestrial channels in 2017 and the number of UK titles broadcast in that time. (Terrestrial television is used here to describe the previous national terrestrial analogue services, all of which have some degree of public service obligation.) UK films are broken down into recent titles (films released in the last 10 years) and older titles (more than 10 years old). 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 1,666 film transmissions on terrestrial television in 2017, up from 1,528 in 2016, an average of just over four and a half films a day. One fifth (20%) of the films shown were UK titles. BBC Two broadcast the greatest number of films overall (435) as well as the greatest number of UK films and recent UK films, with 144 and 67 transmissions respectively. As a percentage of overall films shown, however, ITV had the highest share of UK films (38%).

Table 7 Feature films broadcast[1] on terrestrial television 2017

	Number of films broadcast	Number of UK films broadcast	UK films as % of total	Number of recent UK films broadcast[2]	Recent UK films as % of total films broadcast
BBC One	230	28	12.2	21	9.1
BBC Two	435	144	33.1	67	15.4
ITV	177	67	37.9	11	6.2
Channel 4	430	65	15.1	46	10.7
Channel 5	394	33	8.4	7	1.8
Total	**1,666**	**337**	**20.2**	**152**	**9.1**

Source: BARB, BFI RSU analysis

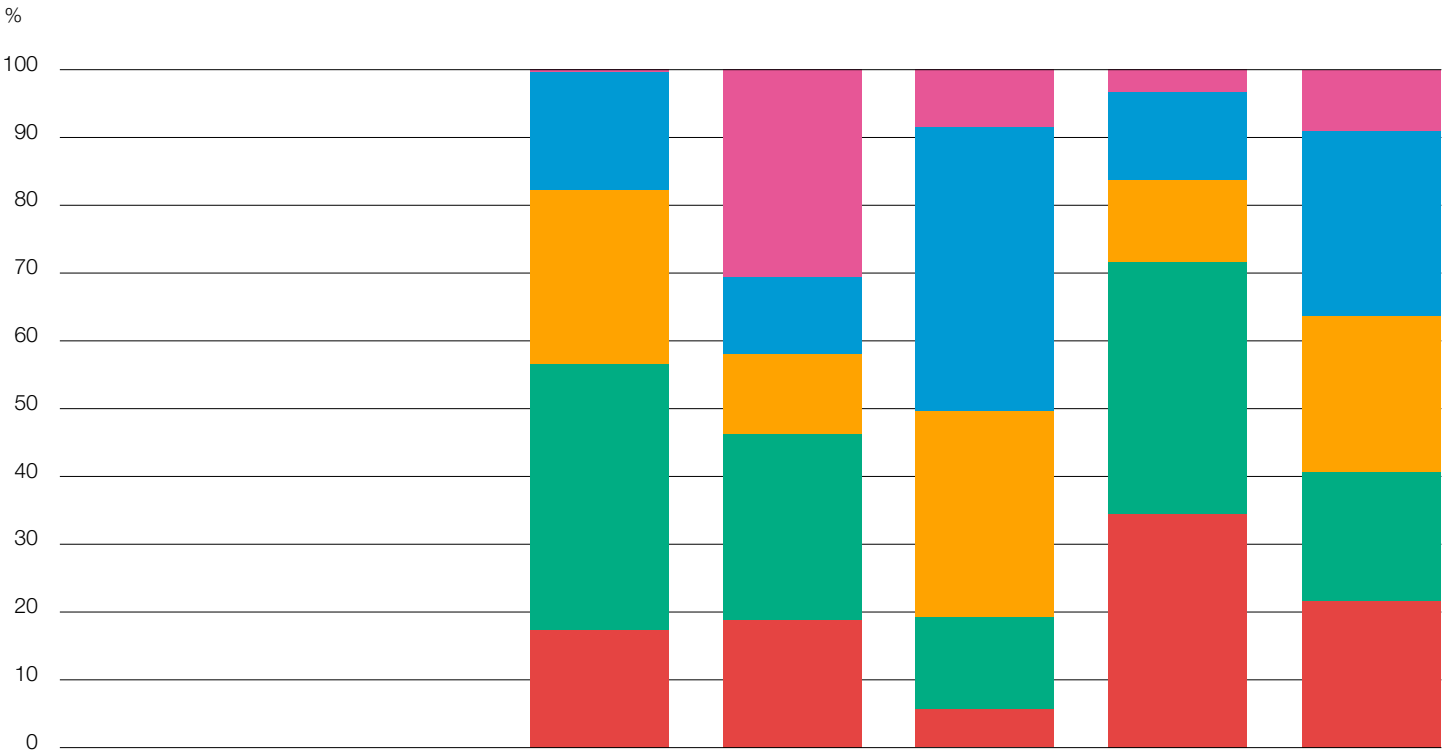
[1] Includes repeat broadcasts of individual titles.

[2] A recent film is one which has been theatrically released, or intended for release, in the UK since 2008.

Figure 11 shows the percentage of films broadcast on the terrestrial channels in 2017 across five age categories. (For this analysis, the age of a film is determined by its year of release in the UK, not production year.) Due to a change in data suppliers we are not able to analyse the number of network premieres in this edition of the Yearbook.

Recent titles made up a larger share of Channel 4's film output than for the other terrestrial channels. Over one third (34%) of the films shown by Channel 4 were less than five years old and 72% of its films were less than 10 years old. At the other end of the scale, 50% of the films shown on ITV had been released at least 20 years before, while 30% of the films screened on BBC Two were at least 50 years old. In the case of BBC Two, many of the film titles shown over the year were Hollywood and British classics from the 1940s and 1950s.

Figure 11 Percentage of feature film by age on terrestrial channels, 2017



	BBC One	BBC Two	ITV	Channel 4	Channel 5
Less than 5 years	17.4	18.8	5.6	34.4	21.6
5-9 years	39.1	27.4	13.6	37.2	19.0
10-19 years	25.7	11.8	30.5	12.1	23.1
20-49 years	17.4	11.4	41.8	13.0	27.2
50+ years	0.4	30.6	8.5	3.3	9.1

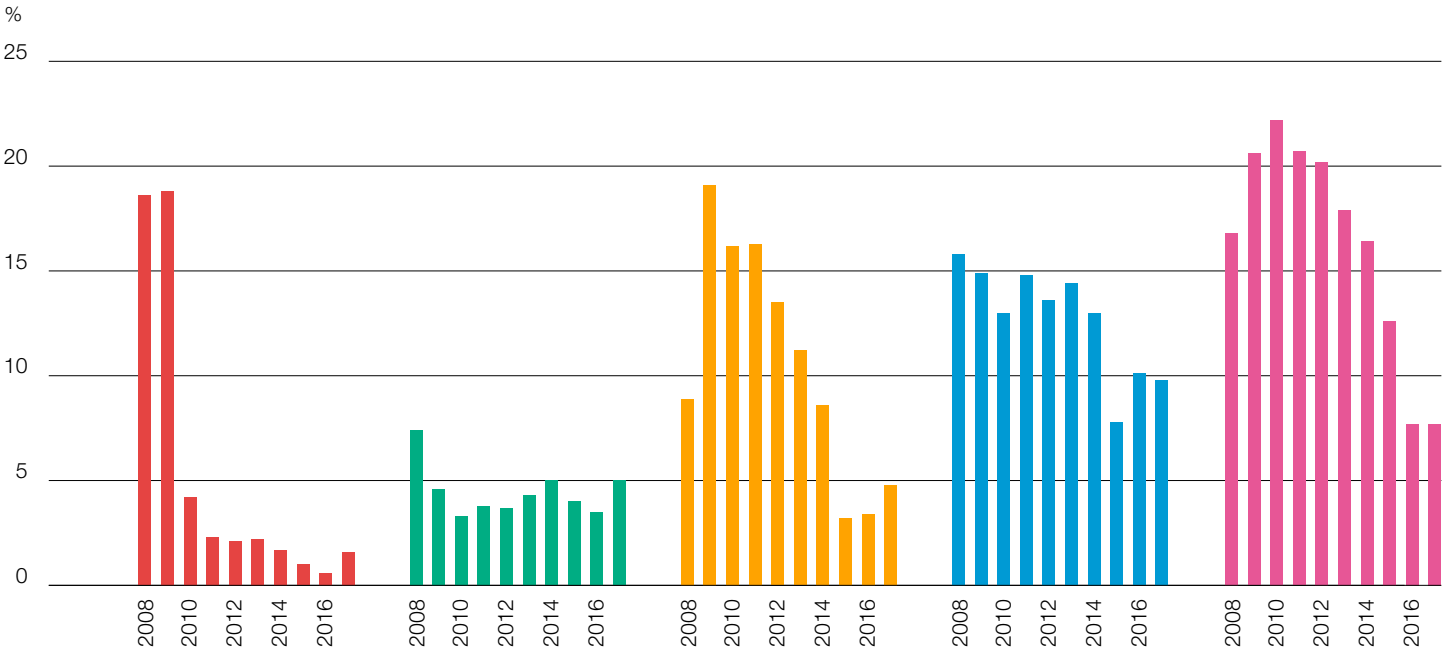
Source: BARB, BFI RSU analysis

FILM ON PEAK TIME TERRESTRIAL TELEVISION, 2008-2017

The proportion of peak time hours (18:00 to 23:00 hours) dedicated to feature film varied widely across the terrestrial channels between 2008 and 2017 (Figure 12). Channel 4 and Channel 5 showed the greatest number of films in peak time hours over the decade.

In 2017, 10% of Channel 4's peak time output was feature film, followed by 8% of Channel 5 programming and 5% of both BBC Two and ITV output. For the seventh consecutive year, BBC One had the lowest proportion of peak time hours dedicated to film (1.6%). Overall, the share of peak time hours used to show film on terrestrial channels increased from 5% in 2016 to 6% in 2017.

Figure 12 Film as a percentage of peak time programming hours by channel, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
BBC One	18.6	18.8	4.2	2.3	2.1	2.2	1.7	1.0	0.6	1.6
BBC Two	7.4	4.6	3.3	3.8	3.7	4.3	5.0	4.0	3.5	5.0
ITV	8.9	19.1	16.2	16.3	13.5	11.2	8.6	3.2	3.4	4.8
Channel 4	15.8	14.9	13.0	14.8	13.6	14.4	13.0	7.8	10.1	9.8
Channel 5	16.8	20.6	22.2	20.7	20.2	17.9	16.4	12.6	7.7	7.7

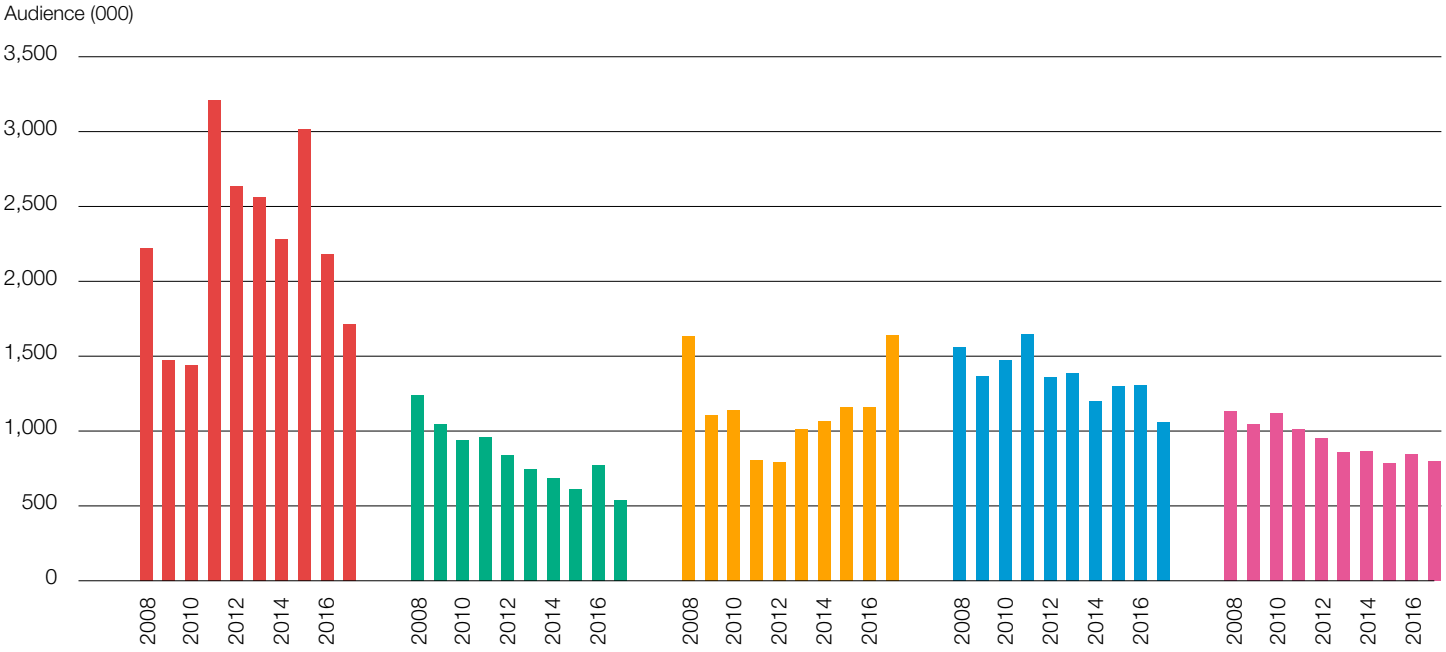
Source: BARB

AUDIENCES FOR FILM ON PEAK TIME TERRESTRIAL TELEVISION

As Figure 13 shows, the average peak time audience for film in 2017 was lower for four of the five terrestrial channels compared to 2016. (This data differs from that in the 2017 Yearbook due to a change in data suppliers and the methodology used to calculate peak time audience share.)

The general trend across the channels has been gradual year-on-year decreases in the average viewership, which is partly attributable to the growth of competition from on-demand services during the period. BBC One had the highest average audience throughout the decade, while BBC Two generally had the lowest. In 2017, peak time films on BBC One attracted an average of 1.7 million viewers (from 230 transmissions), ITV averaged 1.6 million viewers (from 177 transmissions) and Channel 4 averaged 1.0 million viewers (from 430 transmissions).

Figure 13 Average audience for peak time film, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
BBC One	2,223	1,472	1,441	3,210	2,638	2,561	2,278	3,017	2,184	1,712
BBC Two	1,242	1,043	939	961	837	744	687	608	772	535
ITV	1,632	1,104	1,137	803	790	1,015	1,068	1,156	1,160	1,640
Channel 4	1,557	1,367	1,473	1,647	1,360	1,386	1,197	1,300	1,306	1,058
Channel 5	1,129	1,046	1,118	1,010	953	861	864	784	844	797

Source: BARB
Note: Figures for 2008-16 have been revised since publication of the 2017 Yearbook.

TOP FILMS ON TERRESTRIAL TELEVISION

Jurassic World was the most popular film shown on terrestrial television in 2017 attracting an audience of 6.3 million viewers for its Boxing Day screening on ITV (Table 8). It was one of six films in the top 10 to premiere on the terrestrial channels during the year (the films in the list shown for a second time or more were the Harry Potter titles and *Monsters University*). The final film in the Harry Potter series appears in the list twice for separate transmissions in August and December.

In total, three films in the list achieved audiences of more than four million viewers compared with nine in the top 10 list for 2016. Seven of top 10 films in 2017 were US-studio backed UK productions and one was an independent UK title.

Table 8 Top 10 films[1] on terrestrial television, 2017

	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Jurassic World	ITV	USA	2015	6.3
2	Far from the Madding Crowd	BBC One	UK/USA#	2015	4.9
3	Harry Potter and the Deathly Hallows: Part 2	ITV	UK/USA	2011	4.1
4	Guardians of the Galaxy	BBC One	UK/USA	2014	3.9
5	Cinderella	BBC One	UK/USA	2015	3.9
6	Monsters University	BBC One	USA	2013	3.7
7	Harry Potter and the Deathly Hallows: Part 2	ITV	UK/USA	2011	3.5
8	Harry Potter and the Deathly Hallows: Part 1	ITV	UK/USA	2010	3.5
9	Avengers: Age of Ultron	BBC One	UK/USA	2015	3.4
10	Harry Potter and the Goblet of Fire	ITV	UK/USA	2005	3.4

Source: BARB
[1] Films with the highest audience figure for an individual transmission.
Film made with independent (non-studio) US support or with the independent arm of a US studio.

The top 10 most popular UK films on terrestrial television in 2017 include eight titles which also appear in the year's overall top 10 films (Table 9). Four of the films in the list were network premieres, including the most watched title *Far from the Madding Crowd* which attracted an audience of 4.9 million viewers. As in the previous four years, the Harry Potter franchise features strongly in the list with six entries. Two of the Harry Potter titles appear in the list twice for separate transmissions in August and December. *Far from the Madding Crowd* is the only independent UK film in the list.

Table 9 Top 10 UK qualifying films[1] on terrestrial television, 2017

	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Far from the Madding Crowd	BBC One	UK/USA#	2015	4.9
2	Harry Potter and the Deathly Hallows: Part 2	ITV	UK/USA	2011	4.1
3	Guardians of the Galaxy	BBC One	UK/USA	2014	3.9
4	Cinderella	BBC One	UK/USA	2015	3.9
5	Harry Potter and the Deathly Hallows: Part 2	ITV	UK/USA	2011	3.5
6	Harry Potter and the Deathly Hallows: Part 1	ITV	UK/USA	2010	3.5
7	Avengers: Age of Ultron	BBC One	UK/USA	2015	3.4
8	Harry Potter and the Goblet of Fire	ITV	UK/USA	2005	3.4
9	Harry Potter and the Order of the Phoenix	ITV	UK/USA	2007	3.4
10	Harry Potter and the Deathly Hallows: Part 1	ITV	UK/USA	2010	3.3

Source: BARB
[1] Films with the highest audience figure for an individual transmission.
Film made with independent (non-studio) US support or with the independent arm of a US studio.

As shown in the table above, the most popular UK film broadcast on terrestrial television in 2017 was the independent UK title *Far from the Madding Crowd*. The Thomas Hardy adaptation is one of four premieres in the top 10 most popular independent UK films list (Table 10). The list contains more first-run titles than either of the two previous top 10s and the largest share of most recent films: nine of the top 10 films were released in the cinema in either 2014 or 2015.

Table 10 Top 10 independent UK films[1] on terrestrial television, 2017

	Title	Channel	Country of origin	Year of theatrical release	Audience (million)
1	Far from the Madding Crowd	BBC One	UK/USA#	2015	4.9
2	Shaun the Sheep the Movie	BBC Two	UK/Fra	2015	2.1
3	Paddington	Channel Four	UK/Fra	2014	2.0
4	What We Did on Our Holiday	BBC Two	UK	2014	1.7
5	The Second Best Exotic Marigold Hotel	Channel Four	UK/USA#	2015	1.7
6	The Lady in the Van	BBC One	UK/USA#	2015	1.6
7	Legend	Channel Four	UK/Fra/USA#	2015	1.5
8	Trainspotting	Channel Four	UK	1996	1.4
9	Testament of Youth	BBC Two	UK/Nor	2014	1.3
10	Effie Grey	BBC Two	UK	2014	1.3

Source: BARB
Notes:
[1] UK independent films with the highest audience figure for an individual transmission.
Film made with independent (non-studio) US support.

FILM ON MULTI-CHANNEL TELEVISION

In 2017, multi-channel television (freeview/satellite/cable) accounted for 46% 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 11 lists the number of films broadcast, the average audience, the top film and the audience for the top film, for a selection of channels or suites of channels which broadcast feature films. After dedicated film channels Talking Pictures (just under 4,000 films) Film4 (over 2,800 films) and TCM (just over 2,700 films), the highest number of titles was screened by a suite of ITV channels (CITV and ITV2-4) with over 2,500 films. BBC Four and CBBC, which together broadcast only 54 films over the year, had the highest average audience at 211,000 viewers.

In total, 5,147 unique titles were screened on multi-channel television in 2017 across 27,098 slots, compared with 3,625 unique titles across 17,163 slots in 2016, a rise of 41%. For the third consecutive year, *Skyfall* recorded the largest audience for a single broadcast on the platform, attracting just over 1.2 million viewers for its Christmas Day screening on ITV2.

Table 11 Feature films on multi-channel television, 2017

Channel	Number of films broadcast	Average audience (000)	Top film (channel)	Audience for top film (000) [1]
Talking Pictures	3,952	11	House on Haunted Hill	93
Film4	2,854	148	Kingsman: The Secret Service	1,145
TCM	2,707	14	Sherlock Holmes: A Game of Shadows	111
CITV, ITV2, ITV3, ITV4, ITVBe	2,558	196	Skyfall (ITV2)	1,243
5USA, 5SELECT, 5Spike, 5STAR	2,415	77	We're the Millers (5STAR)	440
Rishtey, Rishtey Cineplex	2,045	3	Ae Dil Hai Mushkil (Rishtey Cineplex)	47
London Live	1,596	8	Who Dares Wins	75
&TV, Zee Cinema, Zee TV, Zing	1,565	3	Toilet: Ek Prem Katha (Zee Cinema)	97
SAB	1,526	3	Mehndi	48
Sony Crime Channel 2, Sony Channel, Sony MAX, TruTV, True Entertainment, True Movies	1,317	7	The Scarlet and the Black (True Entertainment)	173
Movies 24, Syfy, Universal Channel	1,221	31	The Last Starfighter (Syfy)	170
Star Bharat, Star Gold, Star Plus	905	3	Housefull 2 (Star Plus)	16
4Music, 4seven, E4, More4	456	159	Thor (E4)	585
Comedy Central, Comedy Central Extra	374	52	Grown Ups 2 (Comedy Central)	222
Alibi, Dave, Drama, GOLD, W	299	107	The Full Monty (Dave)	493
Horror Channel	211	37	Jeepers Creepers II	156
CBS Action, CBS Drama,	179	12	Firewalker (CBS Action)	100
Sky 1, Sky 2, Sky Arts, Sky Atlantic, Sky Witness	158	93	Crocodile Dundee (Sky1)	387
Vice	99	4	The Hurt Locker	33
Disney Channel, Disney Junior, Disney Junior Plus, Disney XD, Lifetime	56	31	Sleeping Beauty (1959) (Disney Junior)	90
BBC Four, CBBC	54	211	Department Q: A Conspiracy of Faith (BBC Four)	781
Boomerang	51	8	Scooby-Doo and the Cyber Chase	71

Table 11 Feature films on multi-channel television, 2017 (continued)

Channel	Number of films broadcast	Average audience (000)	Top film (channel)	Audience for top film (000) [1]
Others showing less than 50 films a year: ABN TV, AMC, COLORS TV, History, Investigation Discovery, Living Foodz, MTV, Nick Jr, Nick Jr 2, Nickelodeon UK, Nicktoons, NTV Europe, PTC Punjabi, Quest, ShowBiz TV, Venus TV and Vox Africa	226	11	The Omen (Quest)	98

Source: BARB

Notes:

[1] Film with the highest audience figure for an individual transmission.

While *Skyfall* attracted the largest audience for a single transmission on multi-channel television in 2017, *Despicable Me 2* was the most popular film overall, with 13.3 million viewers from 16 transmissions (Table 12). Unusually, every film in the top 10 was shown on the same channel: ITV2. Four of the top 10 films are UK qualifying titles, all of which were produced in collaboration with the US major studios.

Table 12 Top 11 feature films on multi-channel television, 2017

	Title	Channel	Number of transmissions	Country of origin	Year of theatrical release	Total audience[1] (million)
1	Despicable Me 2	ITV2	16	USA/Fra/Jpn	2013	13.3
2	Despicable Me	ITV2	21	USA/Fra	2010	11.9
3	Nanny McPhee	ITV2	17	UK/USA/Fra	2005	9.0
4	Skyfall	ITV2	9	UK/USA	2012	9.0
5	Charlie and the Chocolate Factory	ITV2	13	UK/USA/Aus	2005	8.6
6	The Lord of the Rings: The Fellowship of the Ring	ITV2	16	USA/NZ	2001	8.5
7	White House Down	ITV2	12	USA	2013	7.8
8	Nanny McPhee and the Big Bang	ITV2	17	UK/USA/Fra	2010	7.6
9	Evan Almighty	ITV2	24	USA	2007	7.5
10	The Hobbit: The Desolation of Smaug	ITV2	12	USA/NZ	2013	7.3

Source: BARB

[1] Total audience figure for all transmissions across all free-to-air and paid (non-film subscription) multi-channels.

In 2017, pay TV film channels accounted for 14% of all viewings of film on television. Table 13 shows the top 10 films, in terms of combined viewings, on the additional subscription TV film channels operated by Sky in 2017. The various Sky Cinema channels broadcast a total of 1,672 unique titles across 44,778 slots during the year, with an average audience of just over 10,800. This is up on 2016 when 1,556 unique titles were shown across 45,992 slots (with an average audience of just over 13,300).

Disney and Pixar titles dominate the top 10 with six films in the list including the two most watched titles: *Moana* attracted the largest cumulative audience with 13.1 million viewers over 108 transmissions, followed by *Finding Dory* with 7.9 million viewers over 149 transmissions. The large audience figures for nearly all of the top 10 films are due largely to their being shown at least twice a week over the course of the year. *Moana* also generated the largest audience from any single transmission on pay TV, with 2.2 million viewers for its premiere broadcast in July 2017. There is one UK film in the list, the studio-backed title *Alice Through the Looking Glass*.

Table 13 Top 10 feature films[1] on pay TV film channels, 2017

	Title	Number of transmissions	Country of origin	Year of theatrical release	Total audience[1] (million)
1	Moana	108	USA	2016	13.1
2	Finding Dory	149	USA	2016	7.9
3	The Angry Birds Movie	134	Fin/USA	2016	5.9
4	Sing	73	USA/Jpn	2017	5.5
5	The Secret Life of Pets	94	USA/Jpn	2016	5.1
6	The Incredibles	142	USA	2004	4.9
7	The Lion King	133	USA	1994	4.8
8	Beauty and the Beast	86	USA	1991	4.6
9	Ghostbusters	133	USA/Aus	2016	4.4
10	Alice Through the Looking Glass	175	UK/USA	2016	4.0

Source: BARB

Notes:

[1] Total audience figure for all transmissions across all subscription film channels.

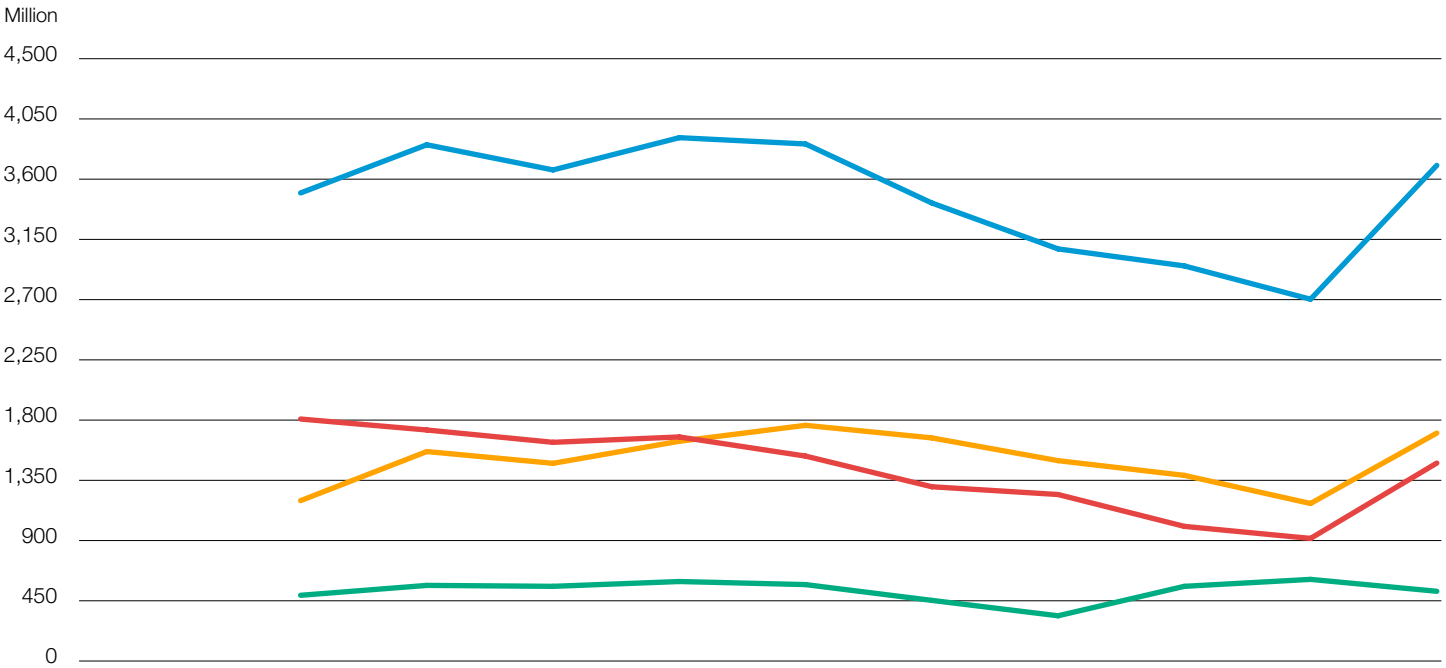
All films were shown on Sky Movies/Sky Cinema.

Image: *Moana* © 2016 Walt Disney Studios Motion Pictures

THE AUDIENCE FOR FILM ON ALL TELEVISION CHANNELS, 2008-2017

In 2017, there were just over 3.7 billion viewings of film on television in the UK (not including pay-per-view) compared with cinema admissions of just under 171 million (Figure 14). This represents approximately 56 film viewings per person per year, up from 41 in 2016. Audience numbers increased for terrestrial and multi-channel television platforms compared with 2016, but decreased for pay TV channels. Multi-channel film viewings (1.7 billion) were greater than terrestrial viewings (1.5 billion) for the sixth consecutive year. Pay TV channels dedicated to film had the smallest overall audience with just over 500 million viewers.

Figure 14 Total audience for feature film on television (except pay-per-view), 2008-2017

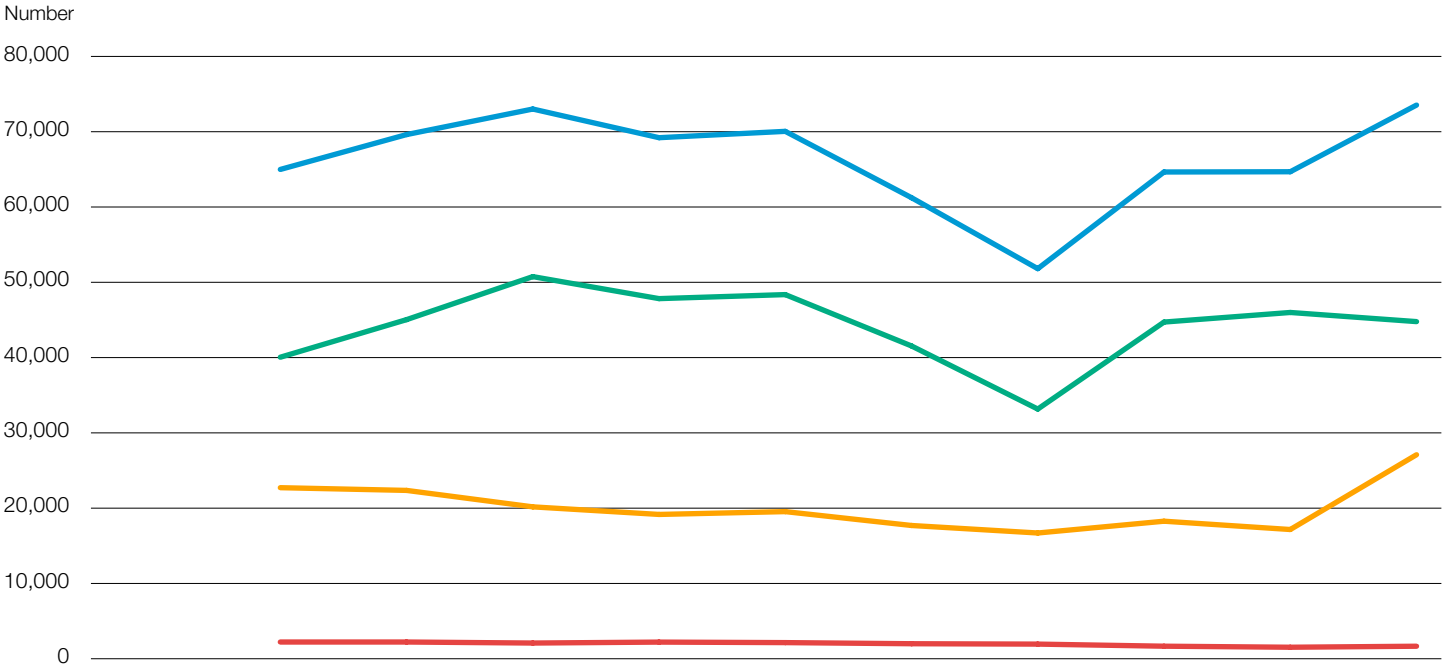


	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Terrestrial	1,808	1,726	1,634	1,674	1,531	1,302	1,244	1,006	916	1,479
Pay TV film channels	491	565	558	594	571	453	338	558	610	521
Other multi-channel	1,198	1,565	1,477	1,642	1,761	1,667	1,497	1,387	1,177	1,703
Total	**3,497**	**3,857**	**3,669**	**3,910**	**3,863**	**3,422**	**3,079**	**2,952**	**2,703**	**3,703**

Source: BFI RSU, BARB

As Figure 15 shows, more films were shown on UK television channels (not including pay-per-view) in 2017 than in any other year in the 10-year period, 2008-2017. In total 7,151 unique film titles were broadcast across 73,538 slots: 1,274 individual film titles were shown on terrestrial TV channels, 1,672 were shown on pay TV film channels and 5,147 were shown on other multi-channels. (This total is less than the sum of the totals of the various channel categories as some titles are shown on multiple platforms.)

Figure 15 Total number of film transmissions on all television channels (except pay-per-view), 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Terrestrial	2,221	2,221	2,085	2,210	2,142	1,994	1,943	1,665	1,528	1,662
Pay TV film channels	40,048	45,039	50,754	47,830	48,365	41,543	33,163	44,717	45,992	44,778
Other multi-channel	22,719	22,359	20,173	19,166	19,541	17,698	16,701	18,268	17,163	27,098
Total	**64,988**	**69,619**	**73,012**	**69,206**	**70,048**	**61,235**	**51,807**	**64,650**	**64,683**	**73,538**

Source: BFI RSU, BARB

THE VALUE OF FEATURE FILM TO BROADCASTERS

We estimate the value of feature film to UK broadcasters to have been approximately £861 million in 2017, up marginally from £860 million in 2016. Of this it is estimated that £142 million is attributable to UK films. This year, television values have been calculated on the basis of a model developed by Ampere Analysis which differs from the methodology used in previous editions of the Yearbook, so the 2016 value has been updated since publication of the 2017 Yearbook. 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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