WATCHING FILMS IN THE UK: HOW OFTEN, HOW MANY AND HOW?

Tracking audience screen engagement (before and during the pandemic)

BFI Research & Statistics Unit - May 2021

WATCHING FILMS IN THE UK: HOW OFTEN, HOW MANY AND HOW?

Tracking audience screen engagement (before and during the pandemic)

Image: Rocks (Sarah Gavron, 2019); Photographed by Aimee Spinks

BFI screen engagement tracking study

The BFI's 2019-2020 tracking study offers a detailed picture of screen engagement throughout the UK nations and English regions – including how we watch films, where we're watching and how often we watch them.

With a nationally representative sample of over 11,500 respondents, two rounds of the study have been completed so far. The first round took place before the COVID-19 pandemic struck at the end of 2019, the second round was conducted in November 2020 and includes measurement of screen engagement during the onset and continued impact of COVID-19 from March to November 2020.

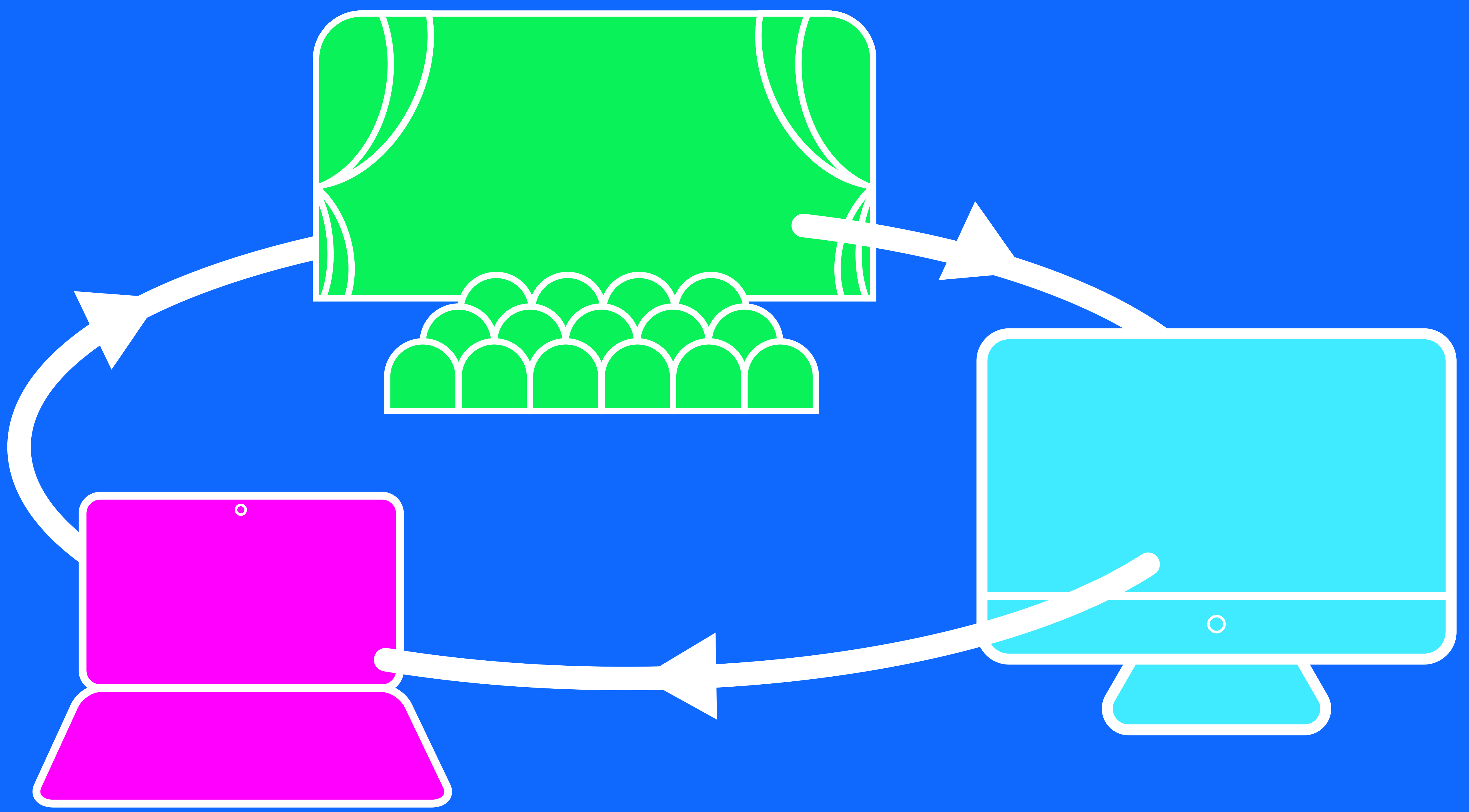
What we learnt

92% Watching films is a universal activity with 92% of all UK adults saying they watched at least one film in the past year.

2% Only 2% claim no interest in watching films.

36 FILMS During 2020, UK adults watched on average a total of 36 films each, a number unchanged from 2019.

10% In 2020 over 10% of film viewers exclusively used only streaming platforms to watch films, up from 4% in 2019.



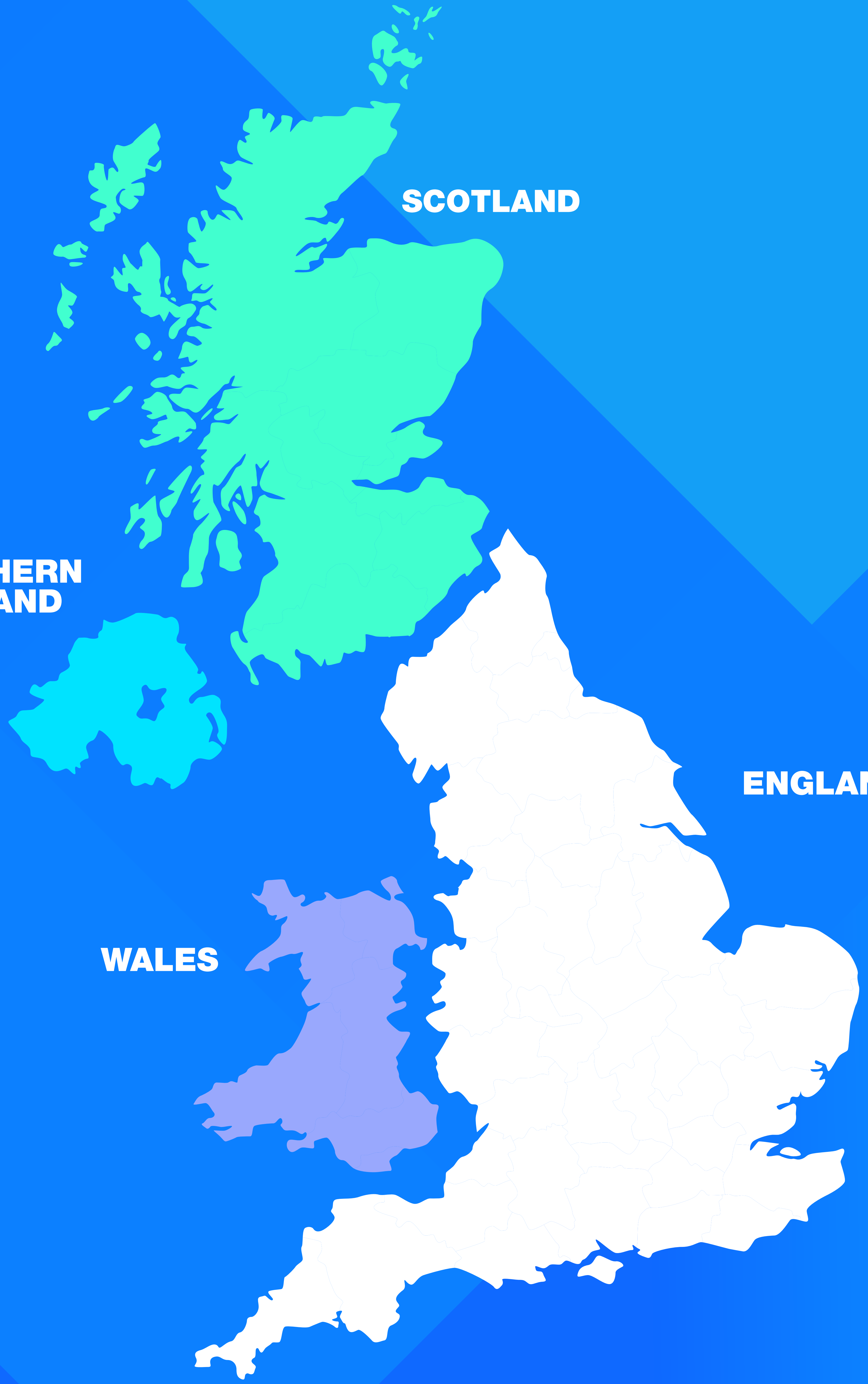
54% 2020 saw significant changes in how we watched films. Viewing on digital platforms surged from 40% of all filmviewing in 2019 to 54% in 2020 and online subscription streaming services captured the largest share (42%) of all film viewing, superceding broadcast television (34%), which fell three percentage points year on year.

31% Despite the multiple closures of venues as the Government imposed restrictions due to the COVID-19 pandemic, a third of adults (31%) watched at least one film at the cinema or other big screen venue in 2020. This reach was significantly higher in London (39%) than in other regions.

1: See slide 15 for details of 2019 and 2020 survey recall periods. Source: YouGov

UK Screen Engagement Tracking Study 2021

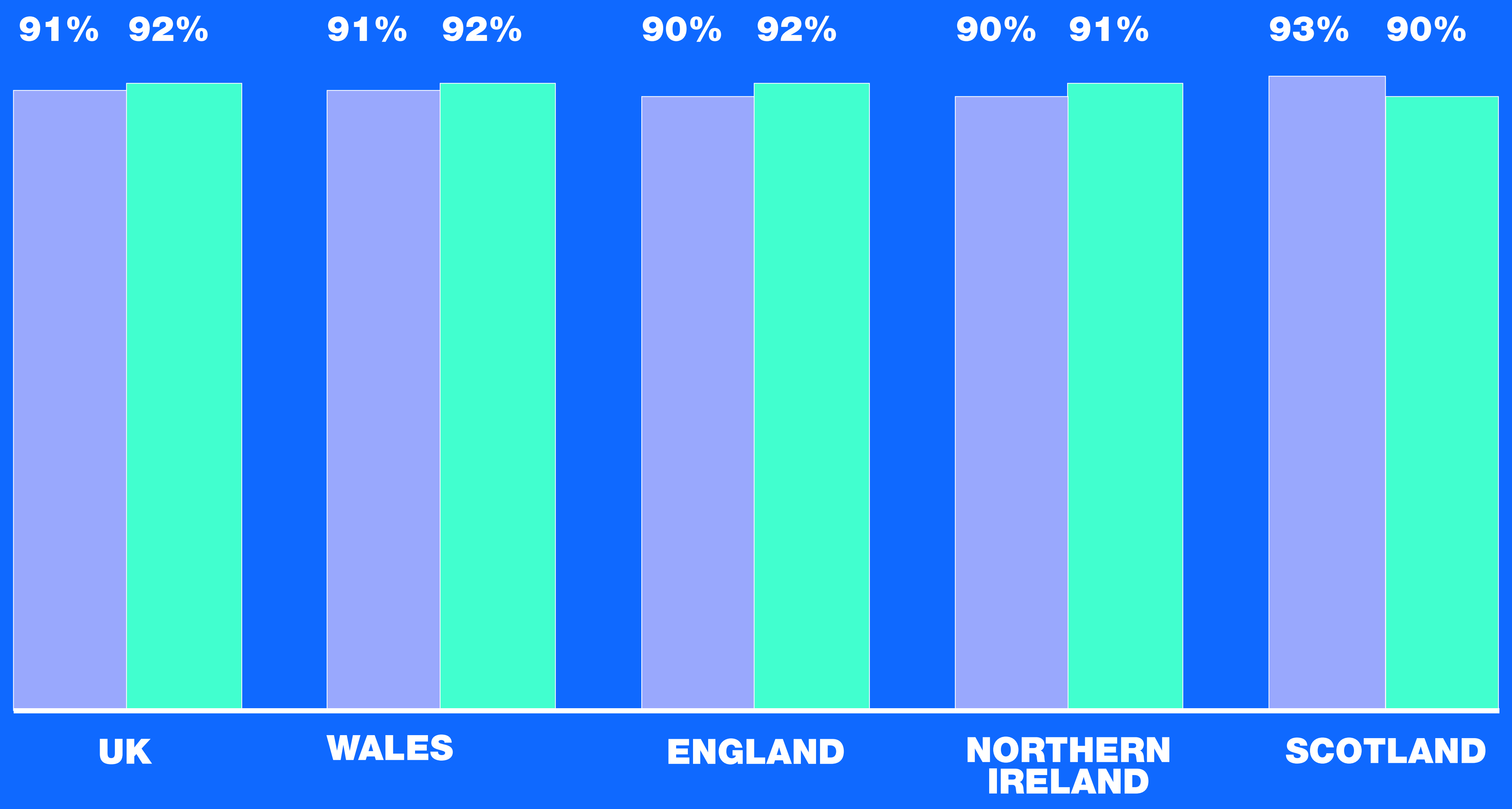
Film viewing – key engagement measures

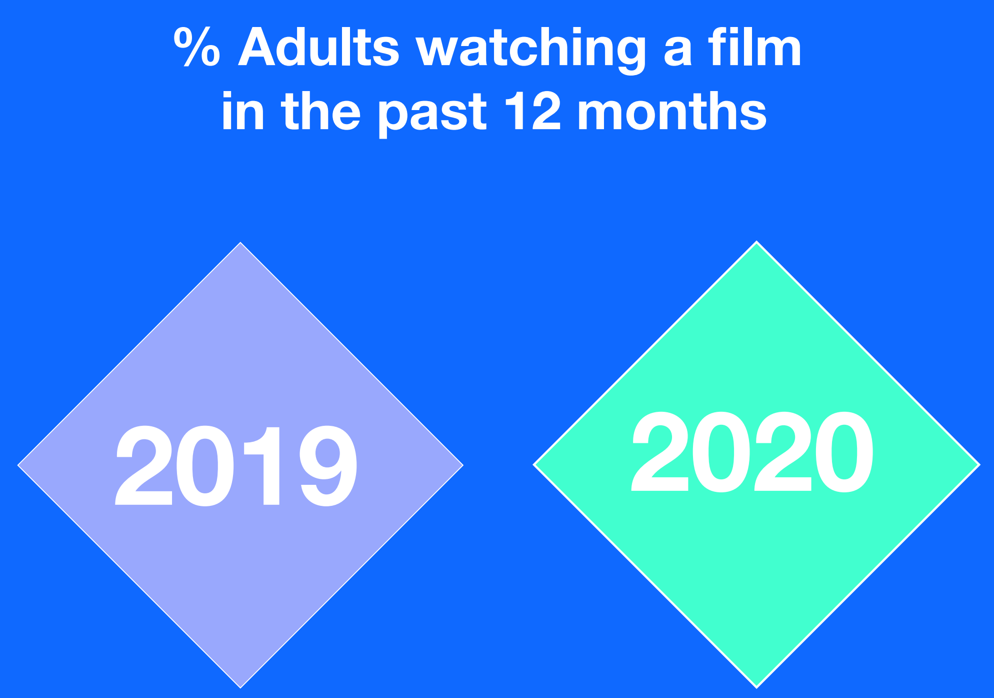


Film viewing has near universal appeal, with more than nine out of ten adults watching a film over the past 12 months

In 2019 and 2020 almost every adult in the UK watched a film.

UK Nations

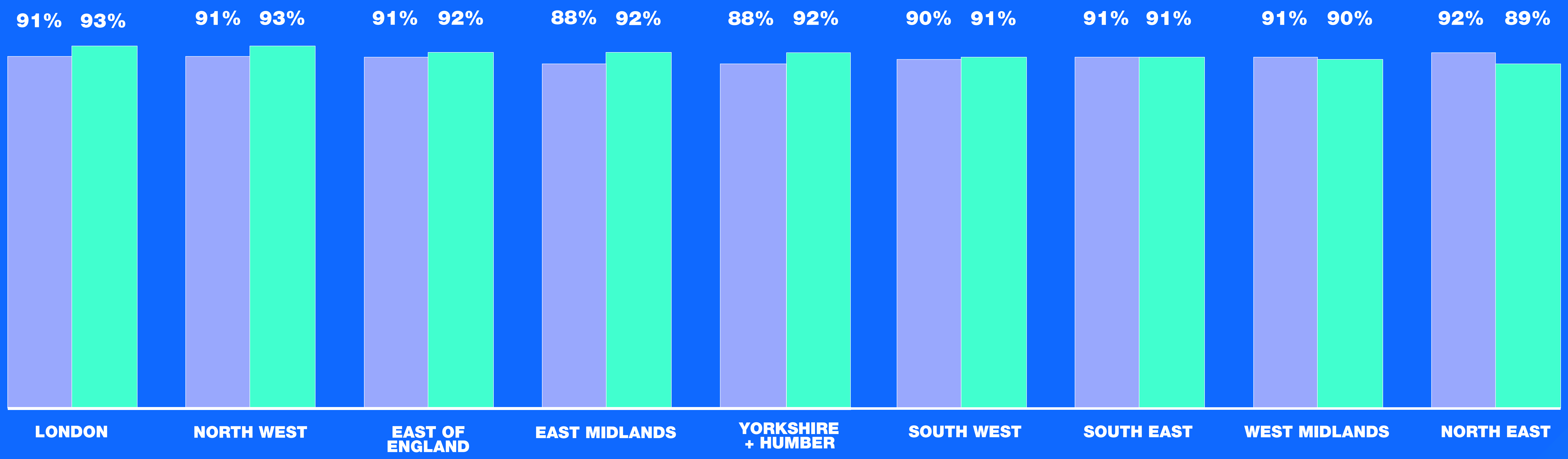




Levels of film viewing were relatively similar across the four nations. Scotland was the only nation to record a decline in the % watching a film from 2019 to 2020.

Reach was also relatively consistent across the English regions, with just a four percentage point difference between London (93% reach) and the North East (89% reach).

English Regions



Source: YouGov. Unweighted samples 2019 (12,029), 2020 (11,570)

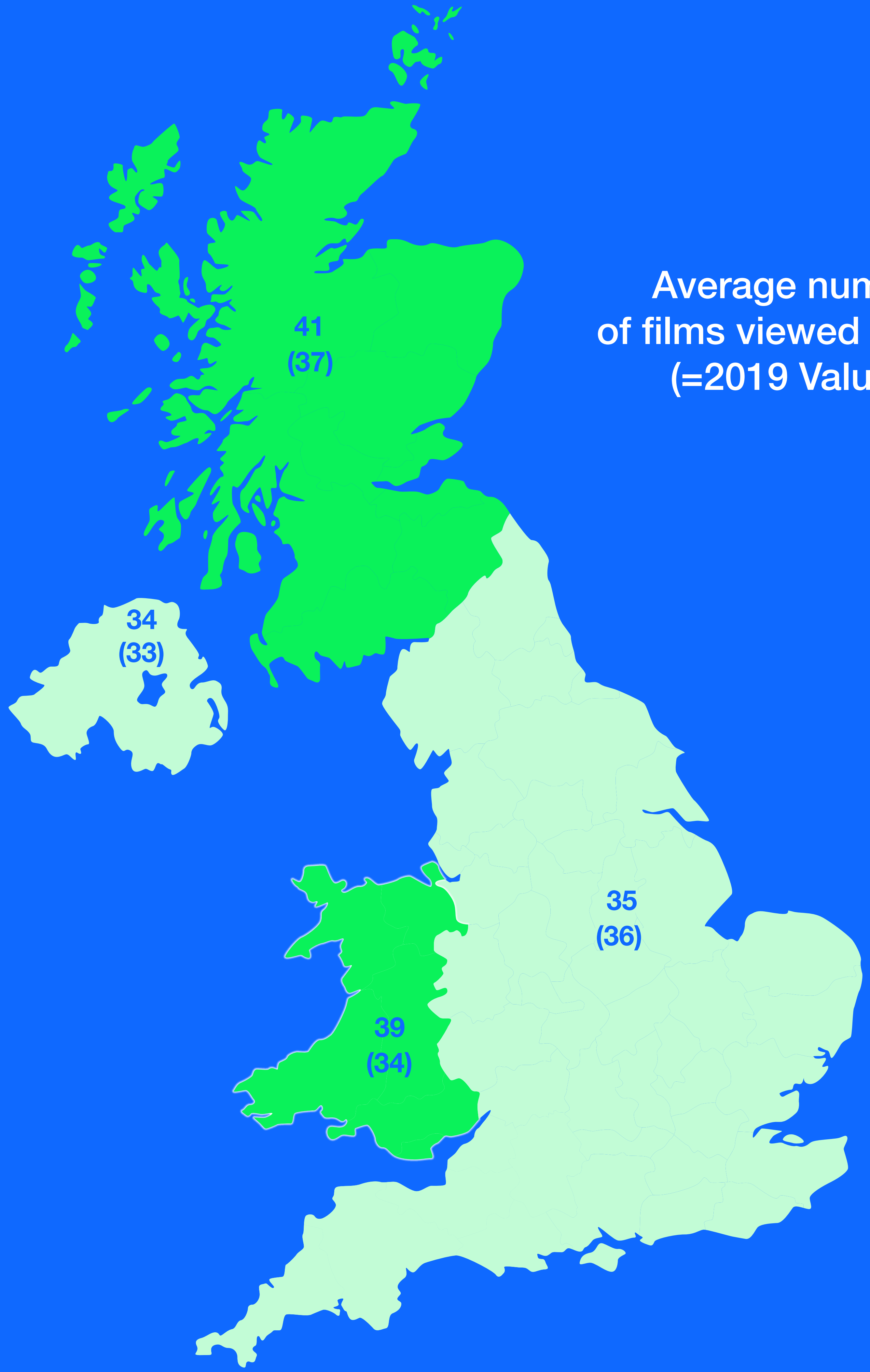
Audiences watched an average of 36 films each during 2020, the same number as viewed in 2019

In 2020 Scottish adults were the biggest film viewing nation, watching an average of 41 films, four more than they viewed in 2019. The smallest viewing nation was Northern Ireland with an annual total of 34, one additional film compared to 2019.

Adults in the South West were the biggest film viewers amongst the English regions, having watched 41 films or nine more than they had in 2019. The West Midlands had smallest levels of film engagement, with an average of 31 films, five less than the previous year.

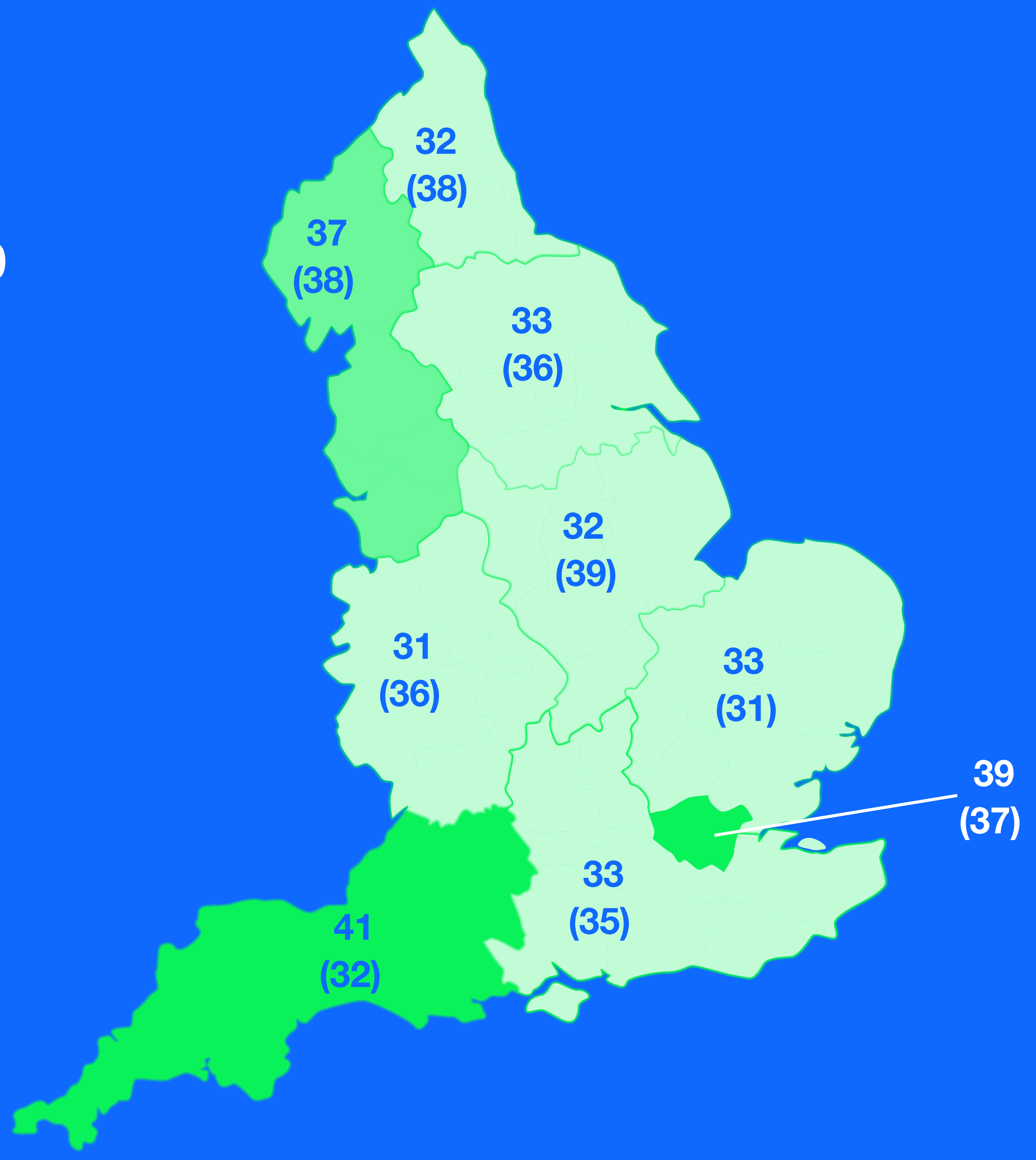
36 Average number of films viewed = 36 (36)

UK nations



Average number of films viewed in 2020 (=2019 Values)

English regions



Higher number — Lower number

Source: YouGov. Unweighted samples 2019 (12,029), 2020 (11,570)

Driven by COVID-19 restrictions, film viewing on digital platforms was twice as popular as seeing a film at the cinema.

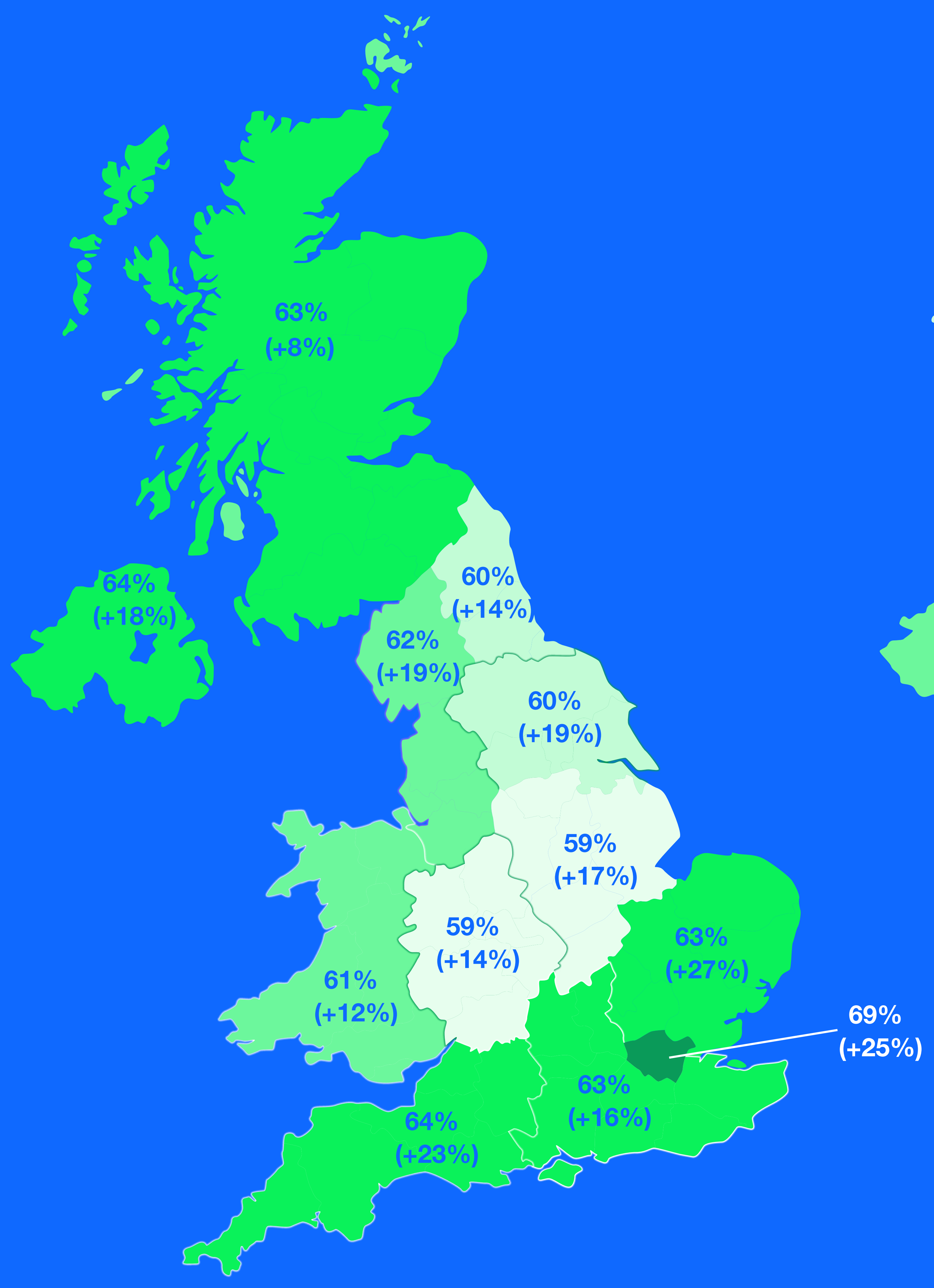
Higher number — Lower number

COVID-19 cinema closures and stay-at-home orders resulted in almost two thirds of the UK watching a film on a streaming platform and fewer than one third visiting a cinema in 2020.

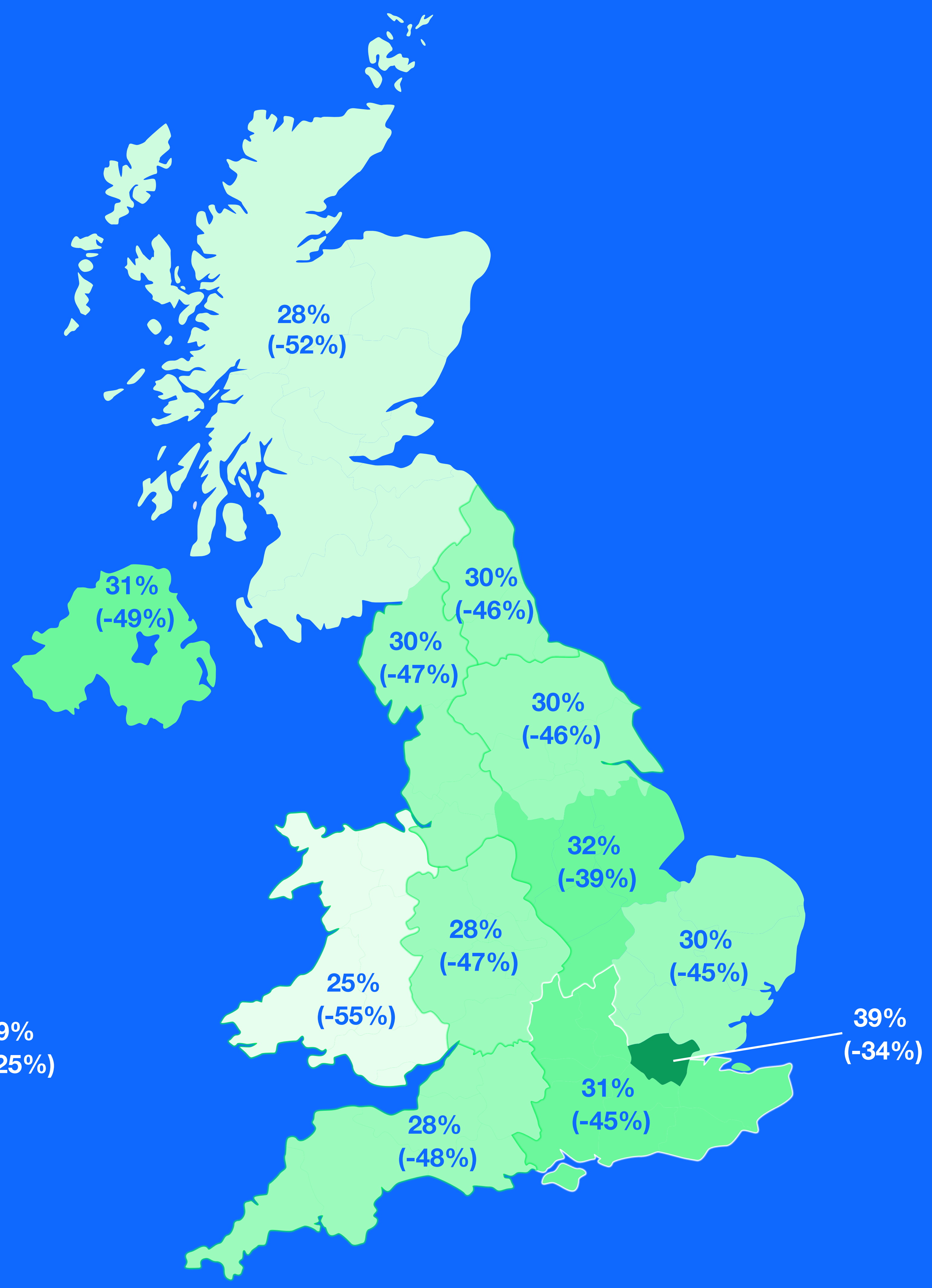
Levels of cinema attendance and streaming of films were highest in London.

63% UK average for adults watching SVod = 63% (+18%)

31% UK average for adults a film at the cinema = 31% (-45%)



% Adults watching SVoD streaming platform



% Adults watching a film at the cinema

Source: YouGov. Unweighted samples 2019 (12,029), 2020 (11,570)

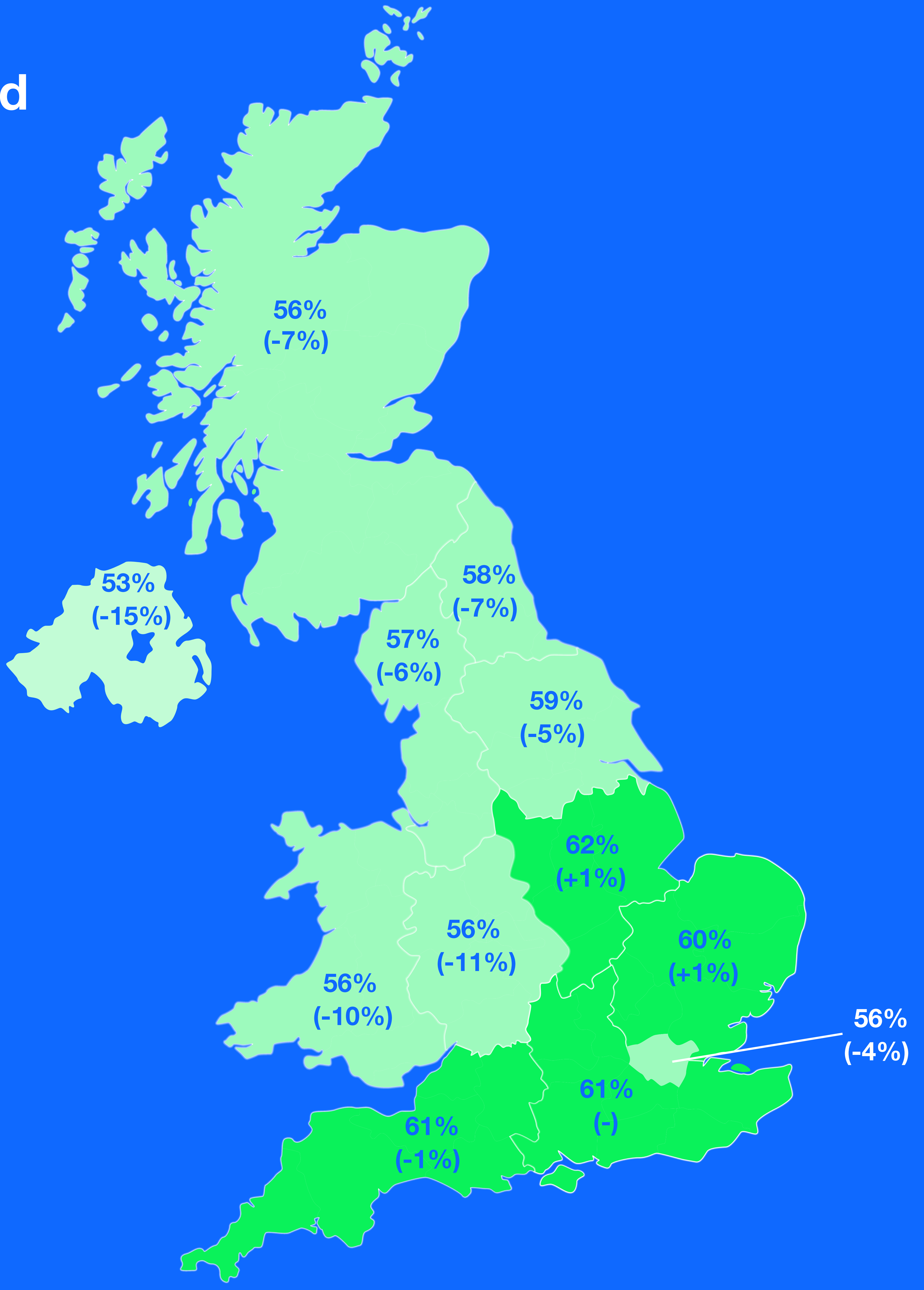
As audiences increasingly moved to watching films on streaming platforms, broadcast TV channels slipped from being the most popular viewing method in 2019 to the second most popular in 2020

% Adults watching films via broadcast TV channels (% vs 2019)

Although audiences in lockdown could have been expected to watch more films on broadcast TV, broadcast viewing levels were marginally lower year-on-year.

Film viewing on broadcast TV was most popular in the South of England, with the exception of London where viewing levels were lower than the UK average.

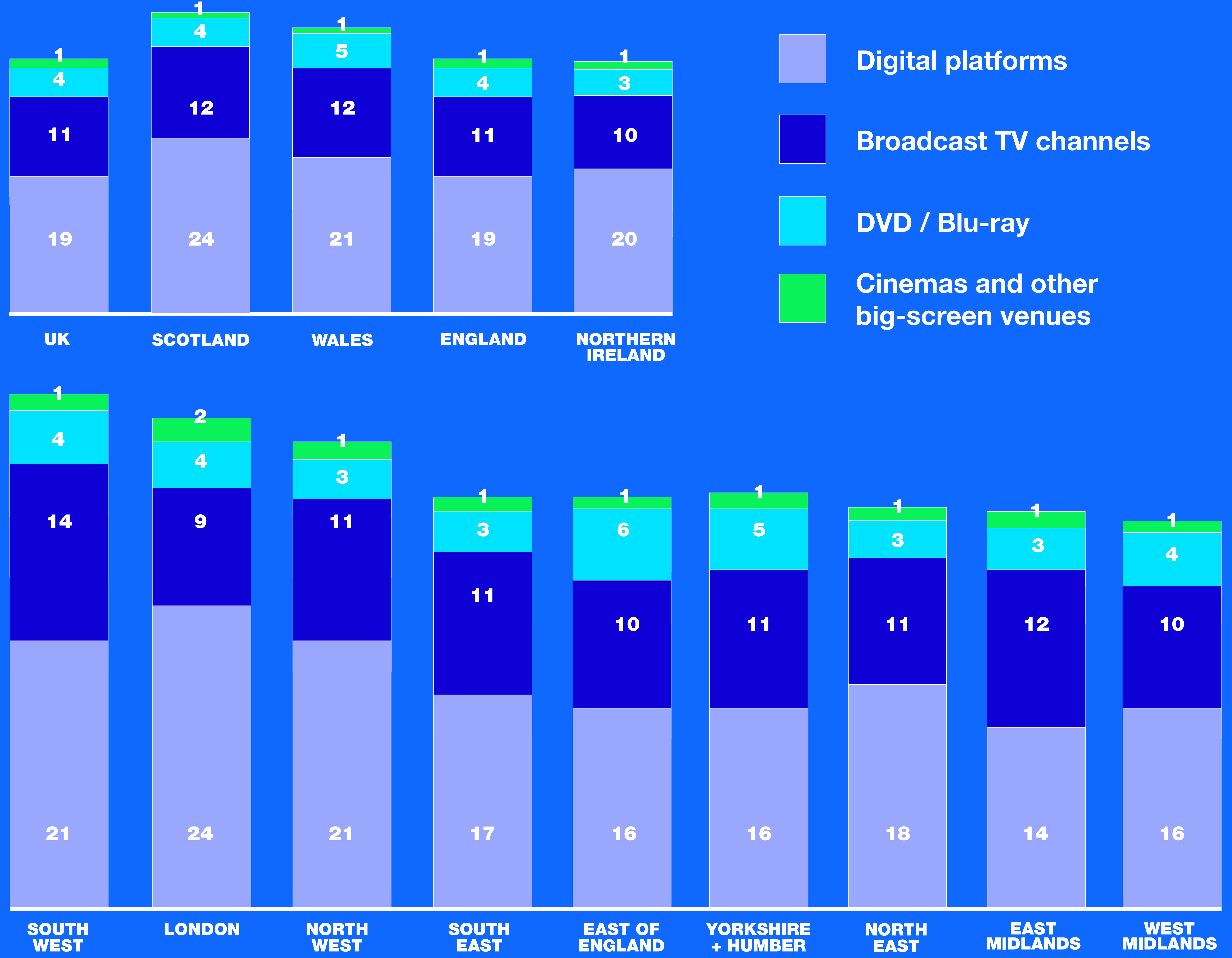
56% UK average = 56% (-5%)



Source: YouGov. Unweighted samples 2019 (12,029), 2020 (11,570)

As cinemas were closed due to COVID-19, UK adults visited a cinema or other big-screen venue only once in 2020

Total number of films viewed by main platform/location



The closure of cinemas and other big-screen venues due to COVID-19 lockdowns for most of 2020 meant, on average, that audiences visited them just once in that 12 month period.

There was a commensurate surge in digital engagement during the same period with digital access becoming the most frequent way to watch films.

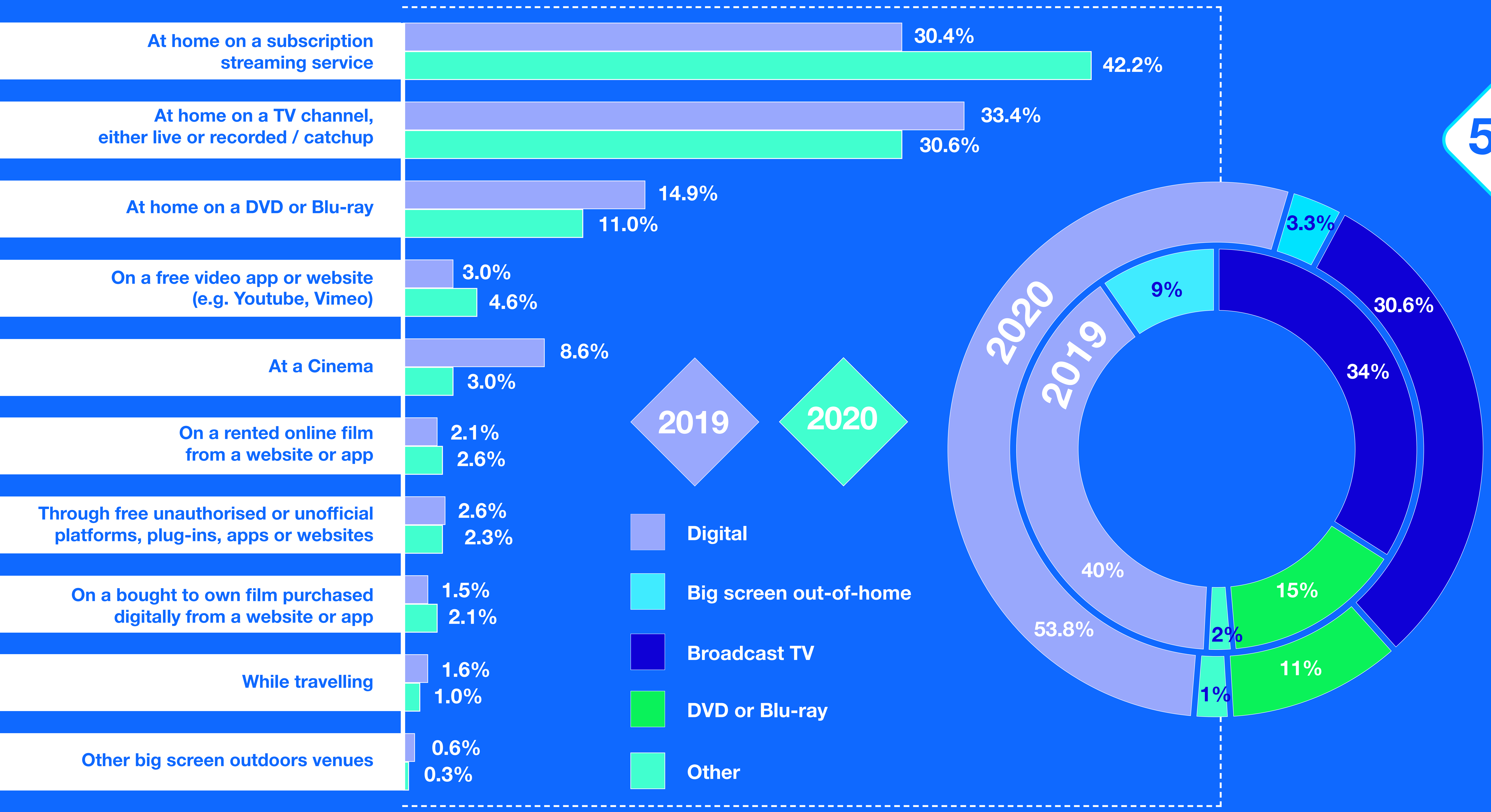
Londoners went to the cinema twice in 2020 compared to the single visit made by adults in other English regions and UK nations.

*Excludes "other viewing" Digital platforms = streaming platforms, free app / website, online rental or purchase, free unauthorised platforms

Source: YouGov. Unweighted samples 2019 (12,029), 2020 (11,570)

In 2020, more than half of all film viewing was through digital platforms, as the share of film viewing from cinema and other big screen venues fell by two thirds

% Share of all film viewing by location and platform



54%

Cinema and other big-screen venues' share of total film viewing fell from 9% to 3% year-on-year. Meanwhile the digitally-driven film viewing share increased from 40% to 54% between 2019 to 2020.

In 2020, streaming platforms exceeded broadcast TV channels to become the most frequently used way to watch films.

On average, film viewers used 3 different ways to watch a film

Locations and methods of watching films

- Cinema
- Film festvial
- Special event
- Outdoor screening
- Indoor screening
- Whilst travelling
- TV channel
- SVoD Streamer
- Free video app / website
- DVD / Blu-ray
- Digital rent
- Unofficial platform
- Other

With almost half of the usual locations and methods of watching films being critically limited because of the COVID-19 lockdowns, the average number of ways used to watch a film dropped from 3.1 to 2.7.

	ENGLAND	WALES	SCOTLAND	NORTHERN IRELAND
2019	3.1	3.0	3.1	3.1
2020	2.8	2.5	2.7	2.6

Number of ways used to watch films

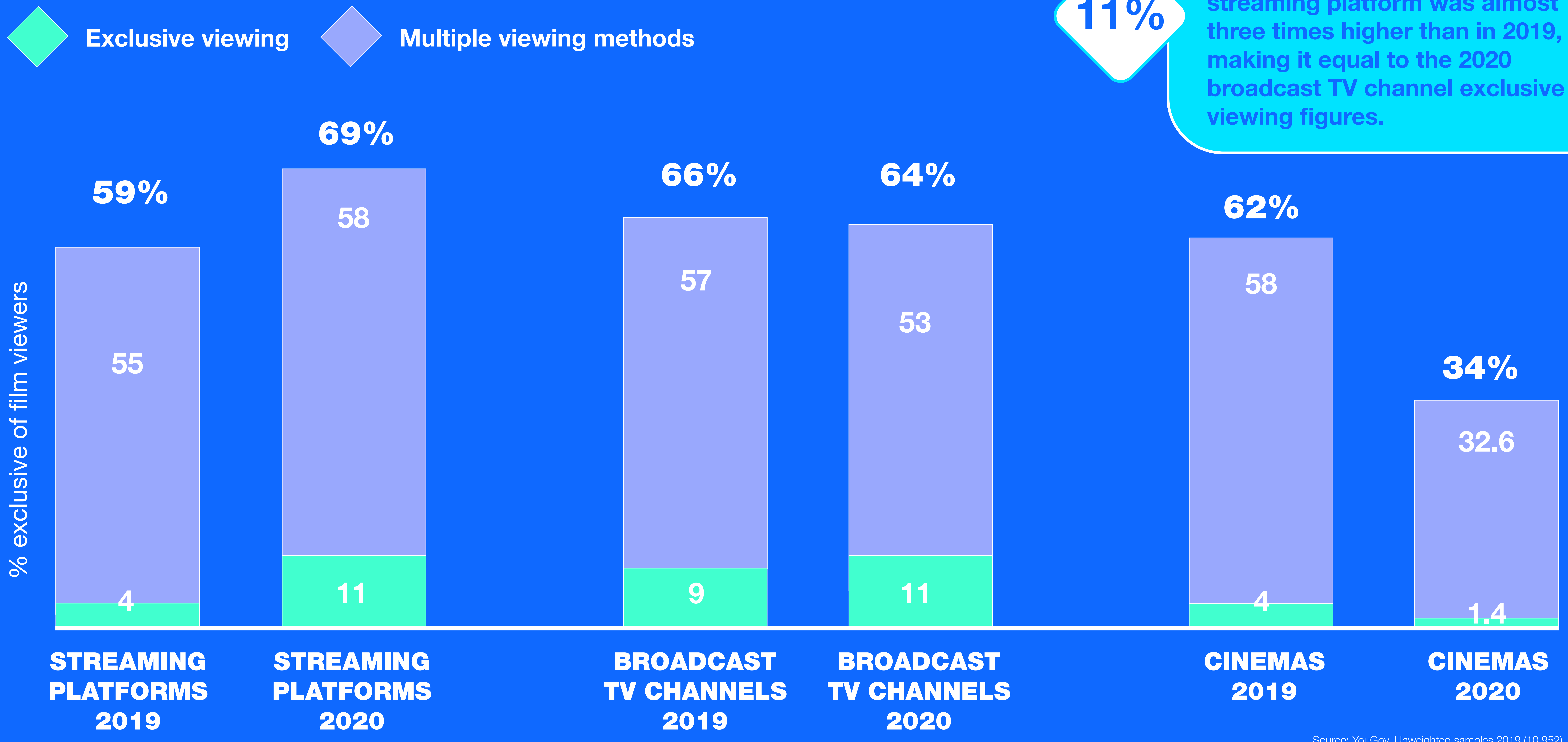
2019	2020
3.1	2.7

On average watching films at the cinema wasn't replaced by another film viewing method. Londoners' film viewing methods remained the most resilient from pre-pandemic to during the lockdown.

	NORTH EAST	NORTH WEST	YORKSHIRE + HUMBER	EAST MIDLANDS	WEST MIDLANDS	EAST	LONDON	SOUTH EAST	SOUTH WEST
2019	3.0	3.0	3.1	3.1	3.0	2.9	3.2	3.1	3.0
2020	2.6	2.7	2.7	2.6	2.7	2.8	3.1	2.9	2.7

Streaming platforms and broadcast TV channels were both used equally exclusively by 11% of viewers to watch films

Film viewers – % exclusive / multiple method viewing



11%

In 2020, the 11% of people who exclusively watched a film on a streaming platform was almost three times higher than in 2019, making it equal to the 2020 broadcast TV channel exclusive viewing figures.

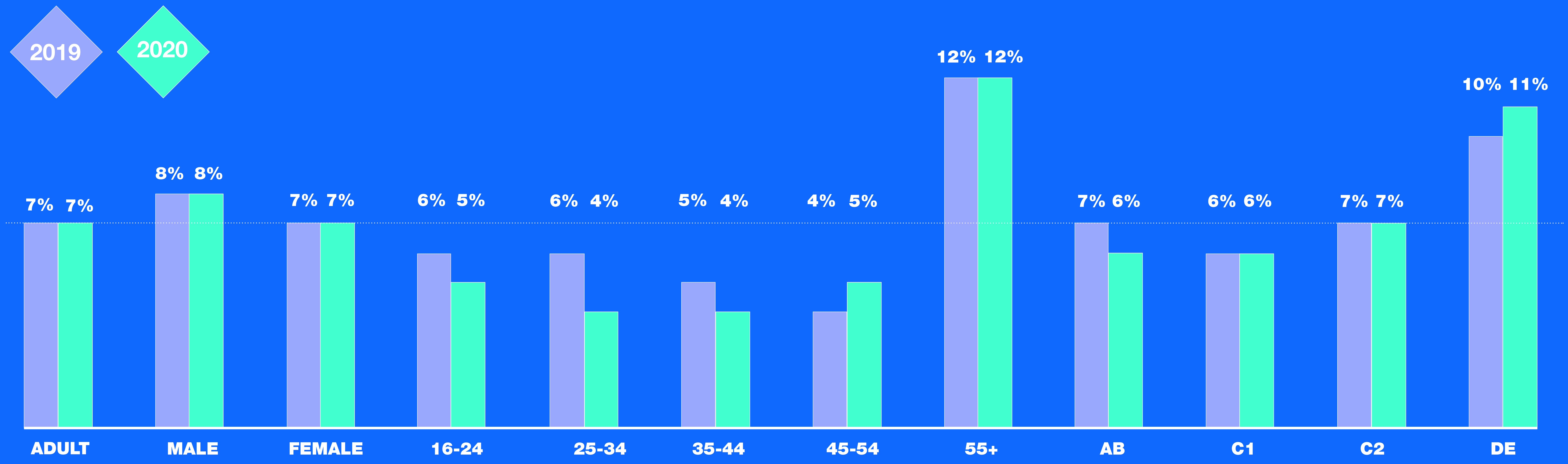
Source: YouGov. Unweighted samples 2019 (10,952), 2020 (10,600)

Fewer than one-in-ten adults had not watched a film in 2019 and 2020, with this group's demographics more likely to be lower socio-economic and older

Non-film watchers
by demographic status - % total target

3X Older adults (55+) were almost three times more likely to have not watched a film than younger adults (16-44). Younger audiences were slightly less likely to have not watched a film in 2020 than in 2019.

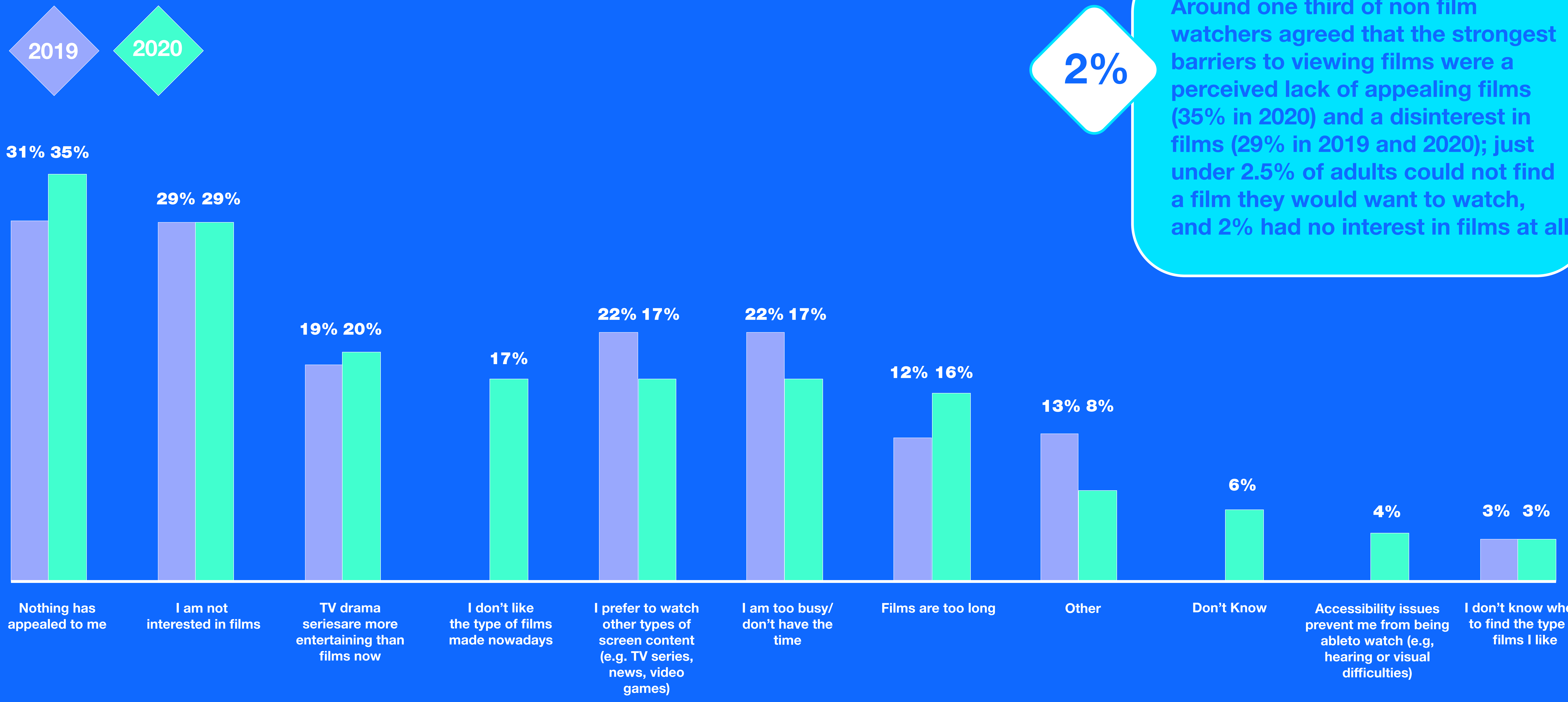
2X Lower socio-economic groups (DE) were twice as likely not to have watched a film in 2020 than high and mid-economic status groups (ABC1).



Source: YouGov. Unweighted samples 2019 (852), 2020 (843)

The strongest barriers to watching films are a perceived lack of appealing films and a lack of interest in films

Non-film watchers - reasons for not watching a film - % agree



2%

Around one third of non film watchers agreed that the strongest barriers to viewing films were a perceived lack of appealing films (35% in 2020) and a disinterest in films (29% in 2019 and 2020); just under 2.5% of adults could not find a film they would want to watch, and 2% had no interest in films at all.

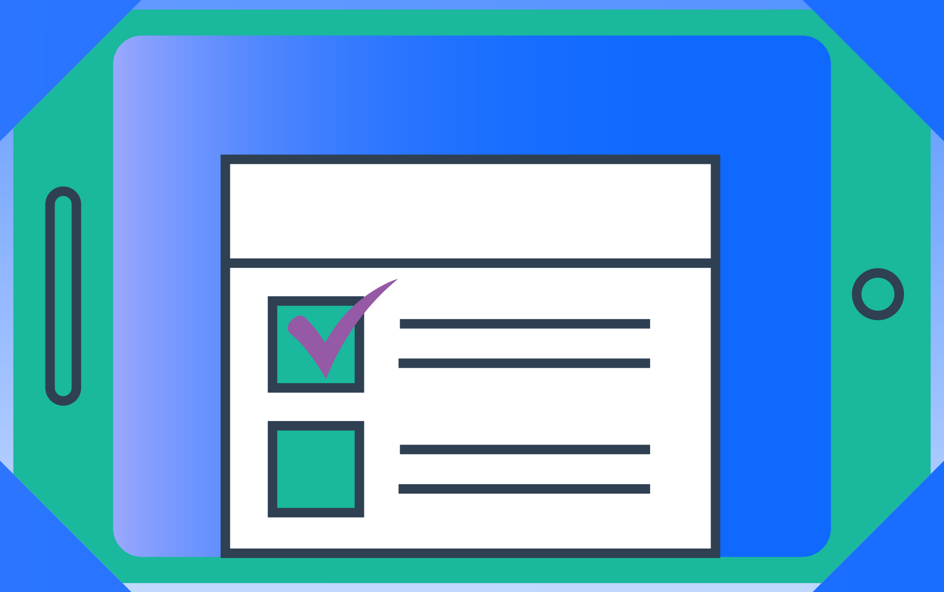
Source: YouGov. Unweighted samples 2019 (852), 2020 (843)

The survey provides a detailed picture of screen engagement throughout the UK nations and English regions

Research overview

The sample is nationally representative at UK nations and English regional level. It is also representative at combined gender by age levels.

The sample included boosts for Northern Ireland, Wales and the North East to ensure robust and reliable statistical analyses of these areas.



11,500 online interviews recruited from YouGov's **1.2** million omnibus panel.

15 minutes, **40+** question survey. Two survey rounds conducted to date.

The 2020 survey' period includes the onset and continued impact of COVID-19 from March to November.

Outputs include

- ✓ Means of watching a film (past 12 months recall)
- ✓ Types and genres of films watched
- ✓ Cultural venue access and cultural venue engagement
- ✓ Cinema engagement, types of cinema, travel duration, spend, the 'local' cinema
- ✓ Other screen behaviours including all at-home screen access and engagement
- ✓ Film and cinema drivers and barriers

The 2020 survey period includes the onset and continued impact of COVID-19 from March to November

Research overview - fieldwork and prompted engagement recall period

2019 and 2020 survey fieldwork and measured 12-month recall period

2019: Main sample and sample boost 12 month engagement recall period

2018			2019												2020	
OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB
Fieldwork - main sample 27 Aug - 12 Sept																
					Fieldwork - sample boost 12-28 Feb											

2020: 12 month engagement recall period

2019		2020										
NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV
				Fieldwork - sample 30 Oct-18 Nov								
				Due to COVID-19 cinemas were closed or had restricted access for 8 months of the 12 month recall period								

Almost two thirds of the 2020 prompted 12 month behaviour recall question was significantly affected by the many consequences of the COVID-19 pandemic.

This study was produced by the BFI Research & Statistics Unit to support the UK film industry and bring you facts that you can use. Please credit this source if you share or use this information.

We publish the annual BFI Statistical Yearbook and produce official statistics and bespoke research throughout the year.

To keep in touch with future insight reports, research findings and events, join our mailing list at **rsuevents@bfi.org.uk**

bfi.org.uk/industry-data-insights