



The UK Market in Focus 2012

Alex Stolz, Venice 2012

CONTENTS

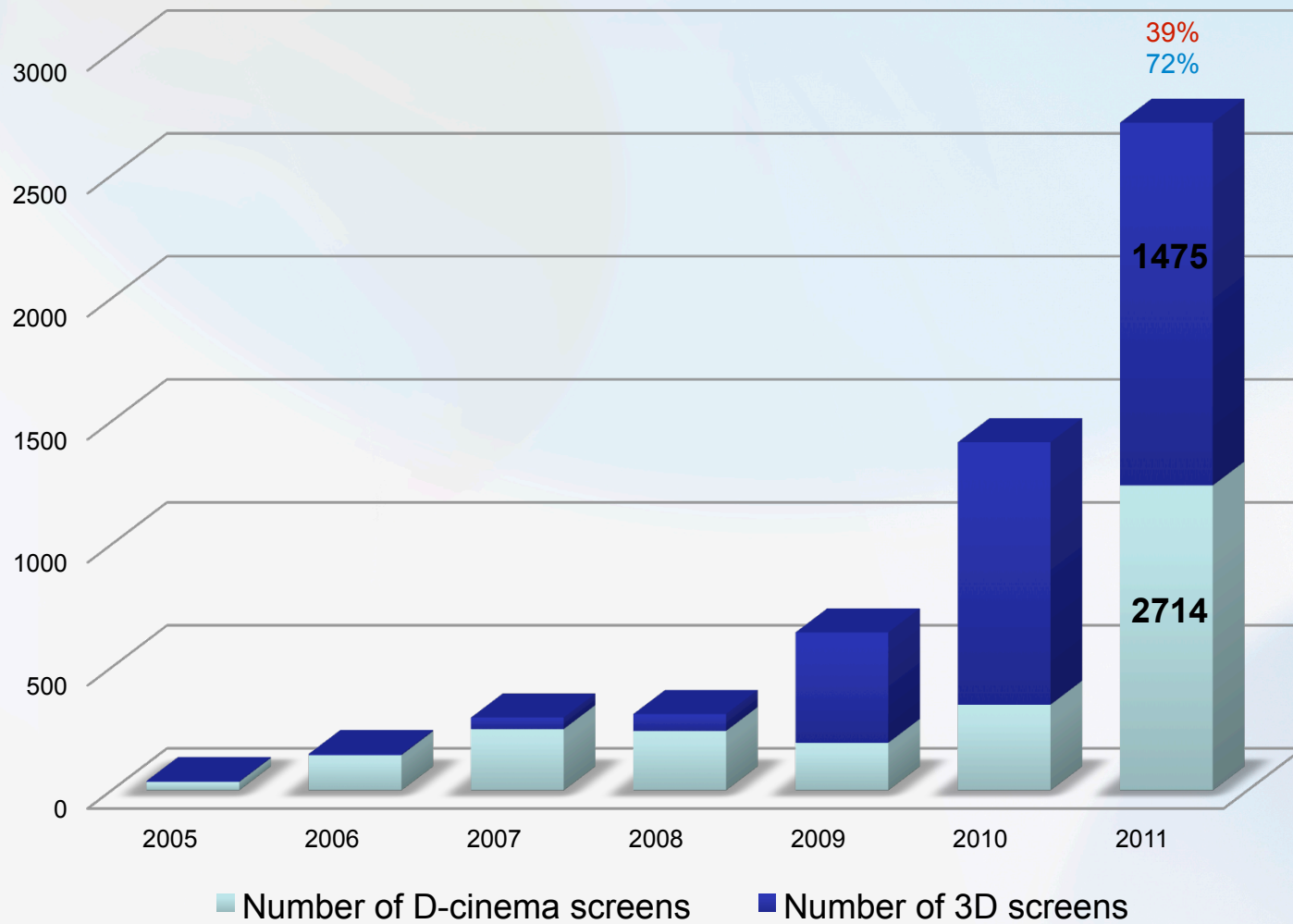
- 'The Digital Decade'
- Theatrical Distribution
- Diversity in the market
- The Power of Data: The Screening Map

The Last Decade

	2002	2011
Number of digital cinema screens in UK	4	2,714
Multi-channel TV share of viewing	22%	45%
Digital TV households	39%	96%
DVD player penetration (% households)	26%	89%
PVR penetration (% households)	1%	46%
Broadband penetration (home and mobile)	7%	76%
Mobile phone ownership (% adults)	59%	92% (39% smartphone)
Tablet ownership (% adults)	0%	11%

Sources: BARB, IHS Screen Digest, Ofcom

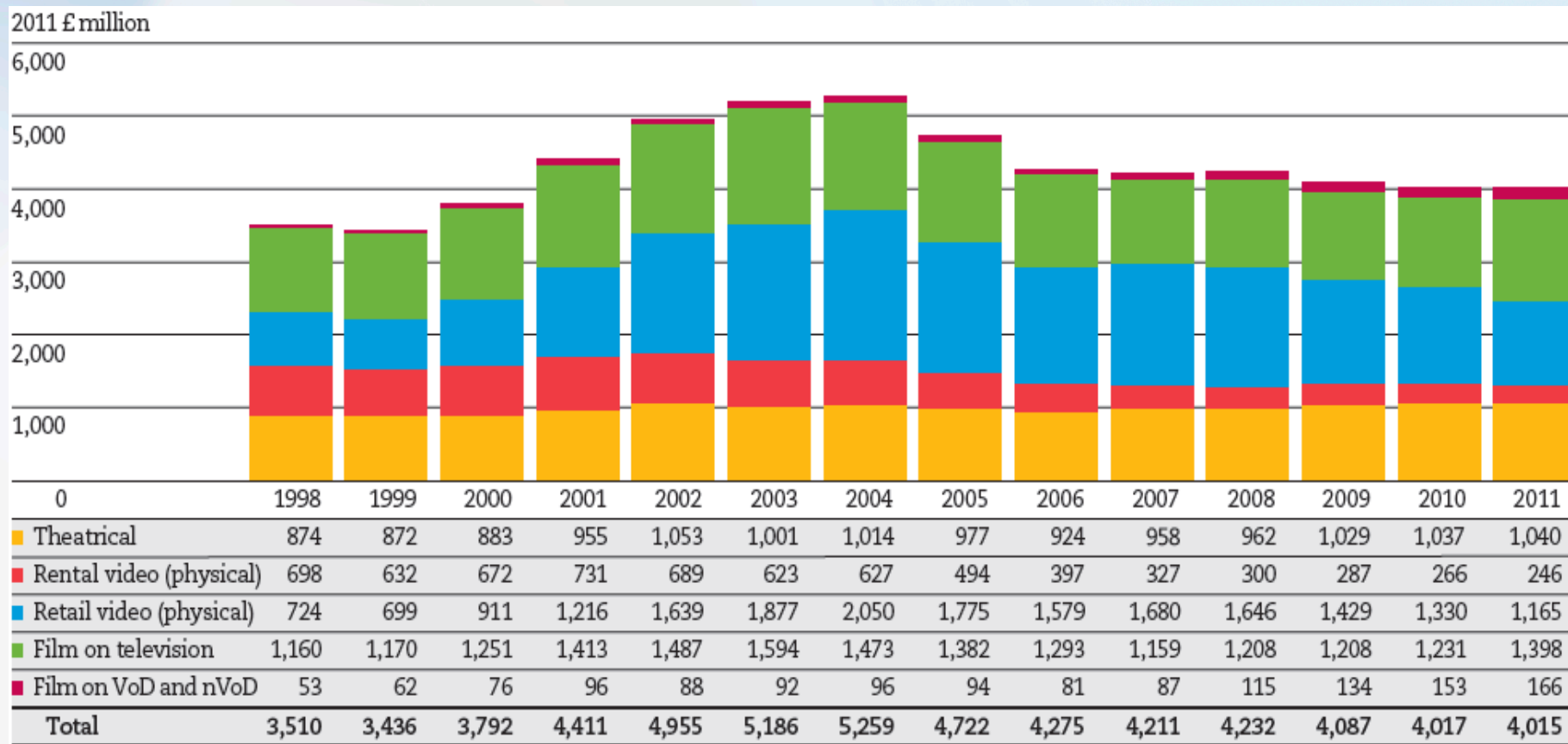
Digital Screens



Changing Patterns of Film Supply and Demand, 2002-2011

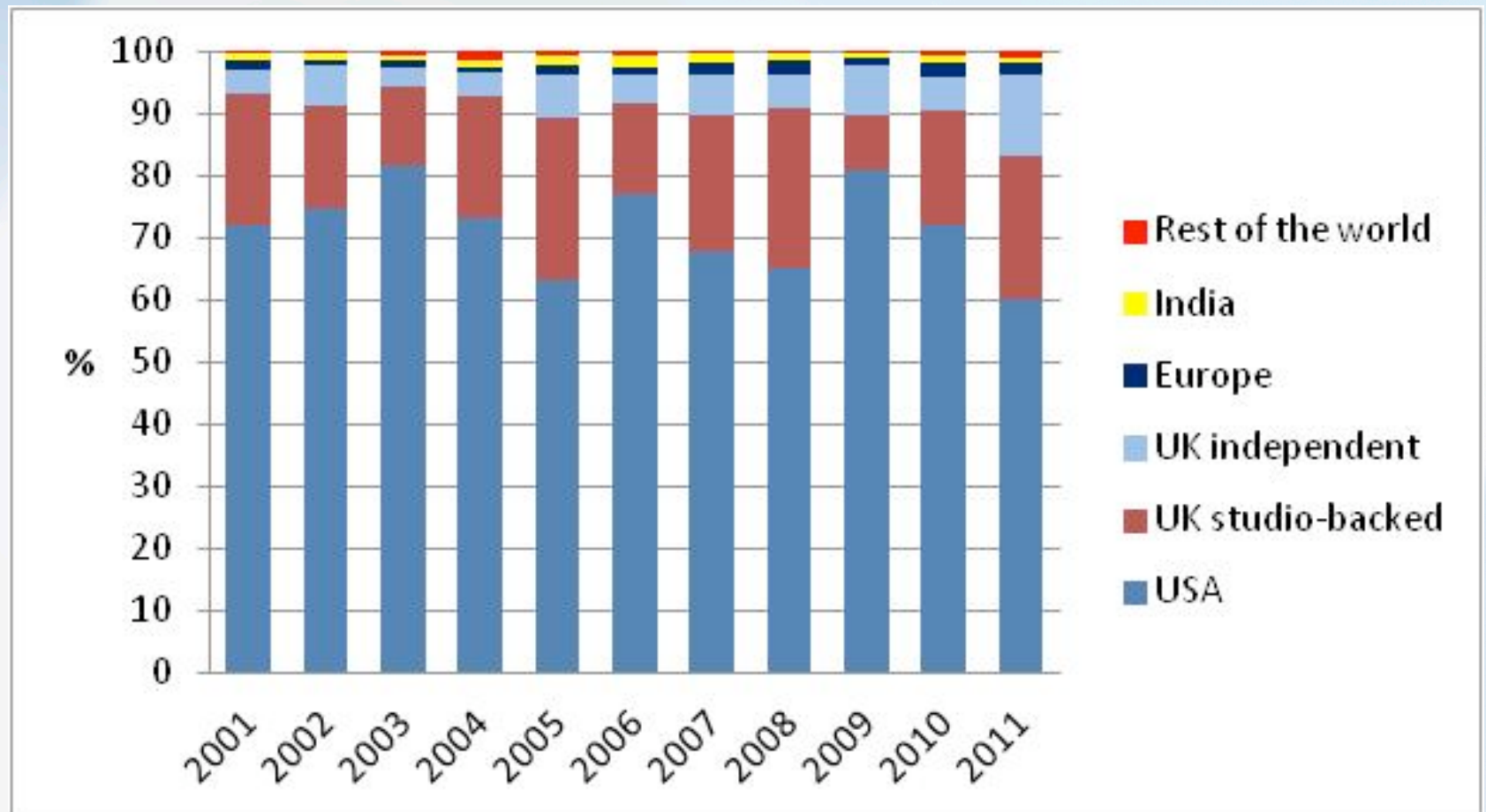
	2002	2011
Number of theatrical releases	369	558
Proportion of box office gross earned Monday-Thursday	32%	42%
Cinema audience aged 45+	18%	28%
Audience for film on terrestrial TV (m)	2,601	1,674
Audience for film on multichannel TV (m)	816	2,228
Non-USA share of the global filmed entertainment market	56%	65%

Gross Inflation-Adjusted Film Revenues, All Platforms, 1998-2011



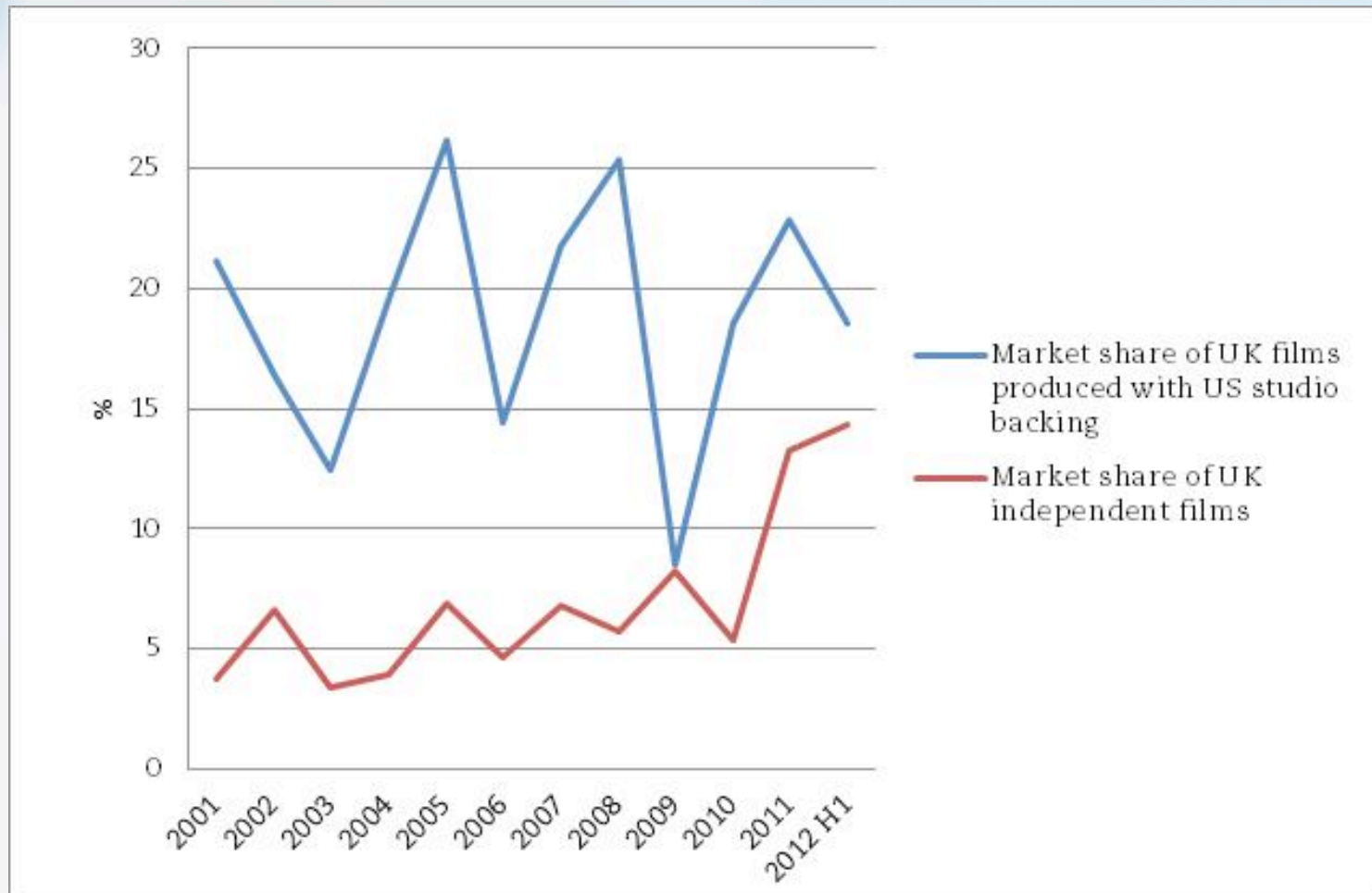
Source: Rentrak, BVA, Official Charts Company, Attentional, ONS, Screen Digest, BFI RSU analysis.

UK Box Office Market Share by Country of Origin, 2001-2011



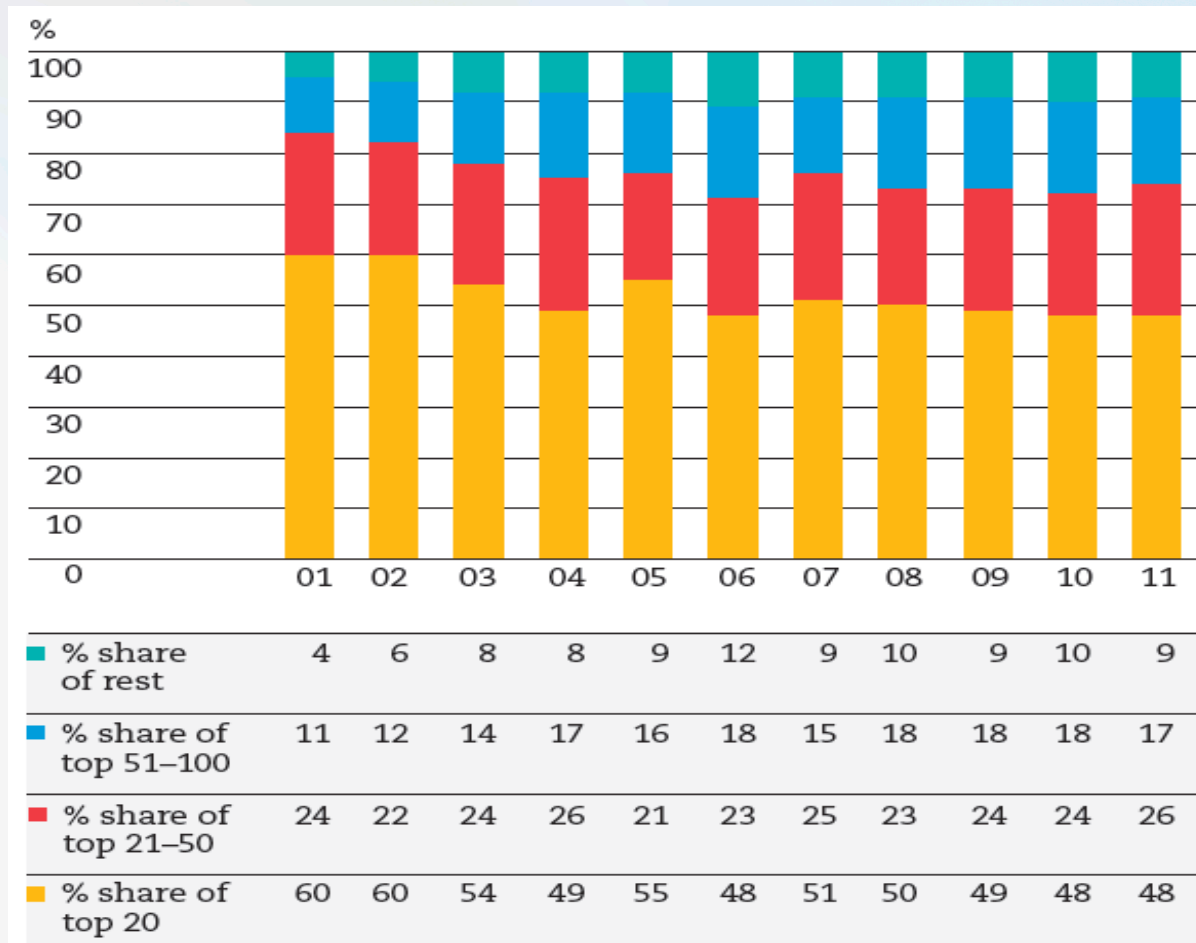
Source: BFI RSU analysis of Rentrak data

Independent UK Films Market Share 2001-2012 H1



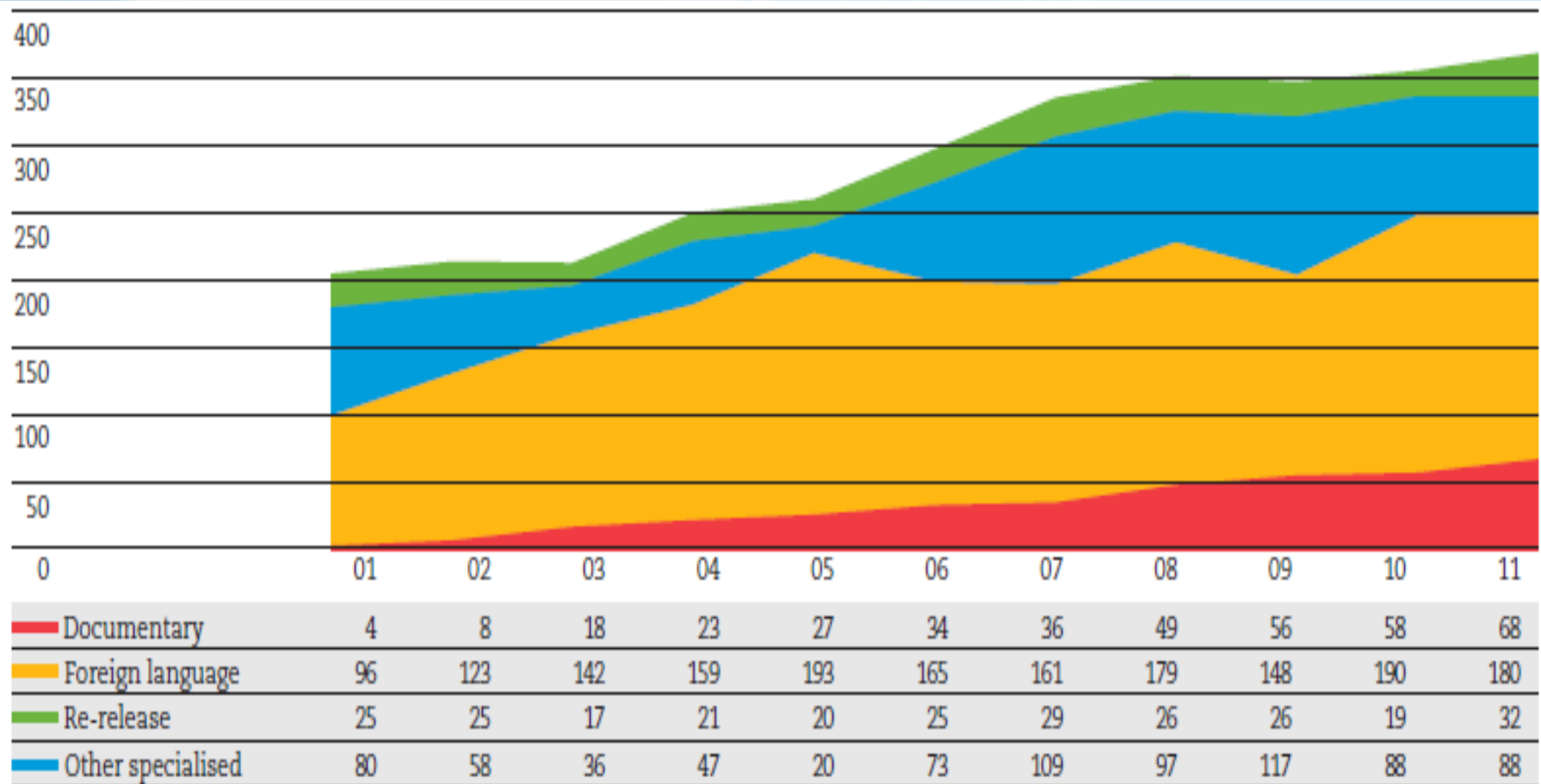
Source: BFI RSU analysis of Rentrak data

Market Share of Top 20, 21-50, 51-100 and Rest of Films, 2001-2011



Source: Rentrak, BFI RSU analysis.

Number of Specialised Releases, 2001-2011



Source: BFI RSU analysis of Rentrak data.

The Screening Map Project – using data to better understand audience behaviour

- In 2011, 9,309 films were screened 5,282,145 times in total at 2,129 venues across the UK...

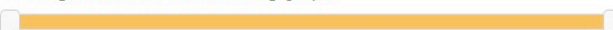
Venues that screened a film publicly in 2011

All public screenings of films are recorded each month by the BFI. Here we present that data as a cluster map of all venues, large and small, that showed a film publicly in 2011.

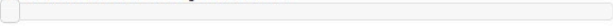
Click or tap a cluster to find out about particular venues.

Search for a venue

Showing venues with 0 - 37140 screenings per year



and that show 0% or more specialised film



Size of each dot
represents
number of
venues in an
area.

All venues that screened a film in 2011

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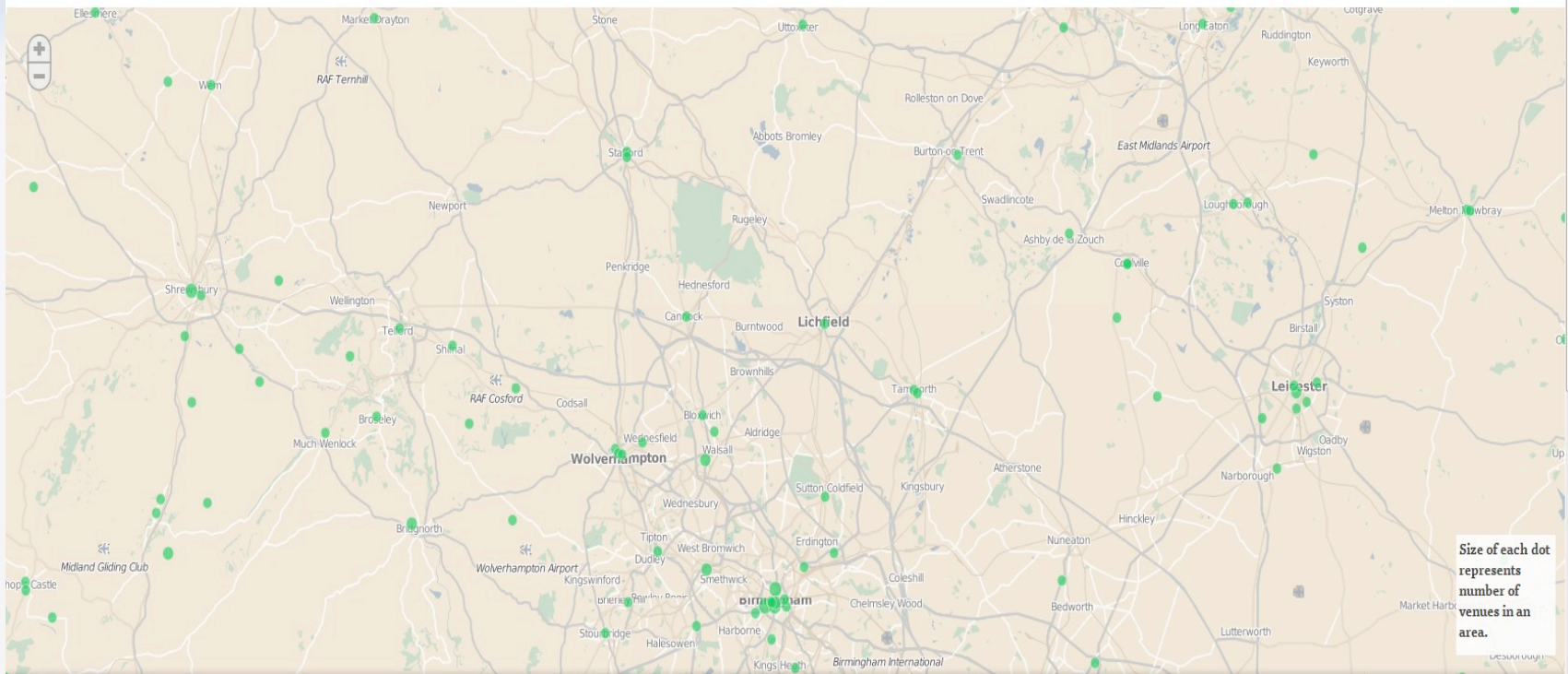
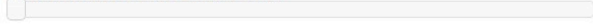
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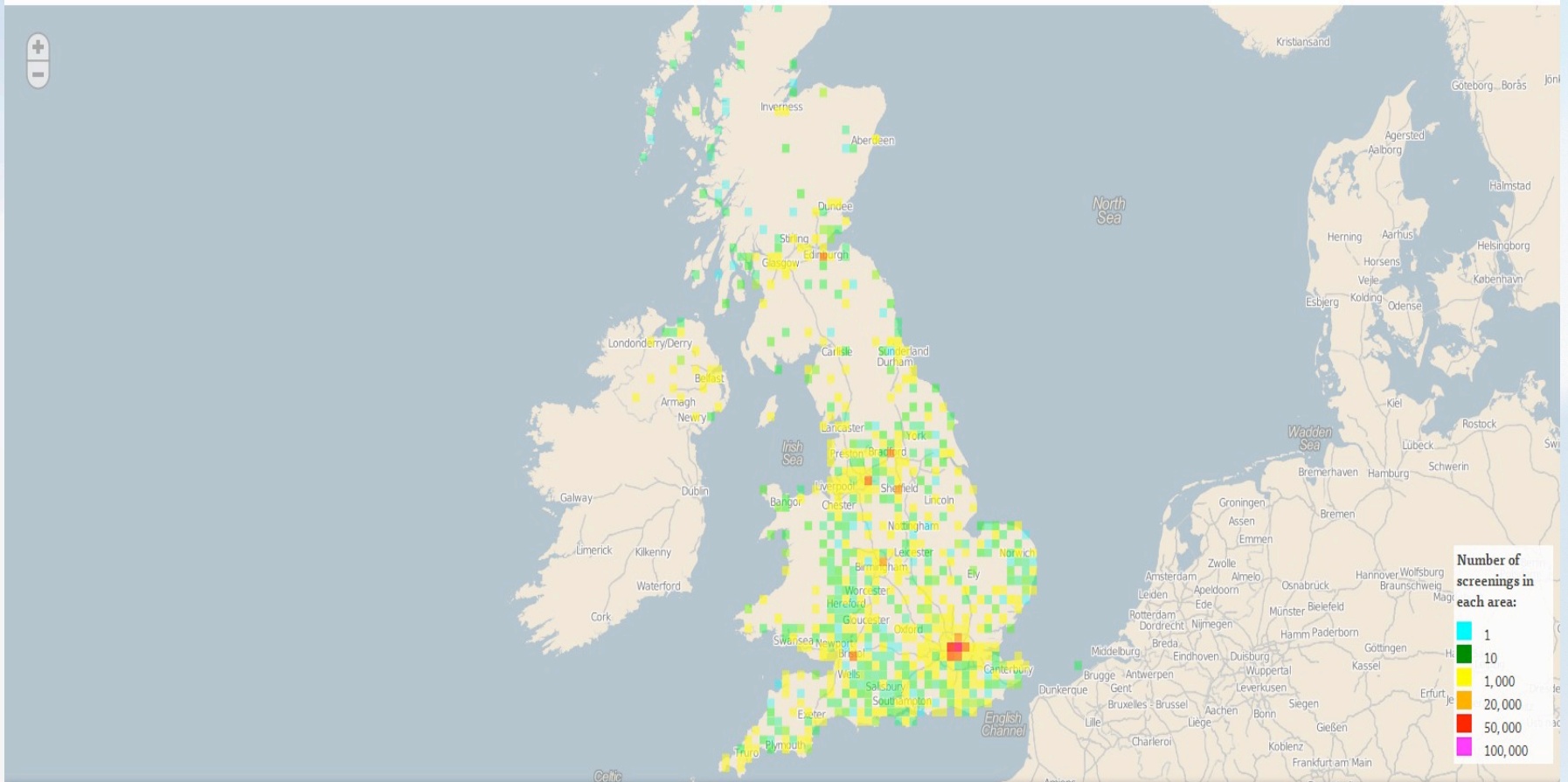


All venues that screened a film in 2011

Specialised film screenings in the UK in 2011

All records of public screenings of films classed as Specialised are recorded each month by the BFI.

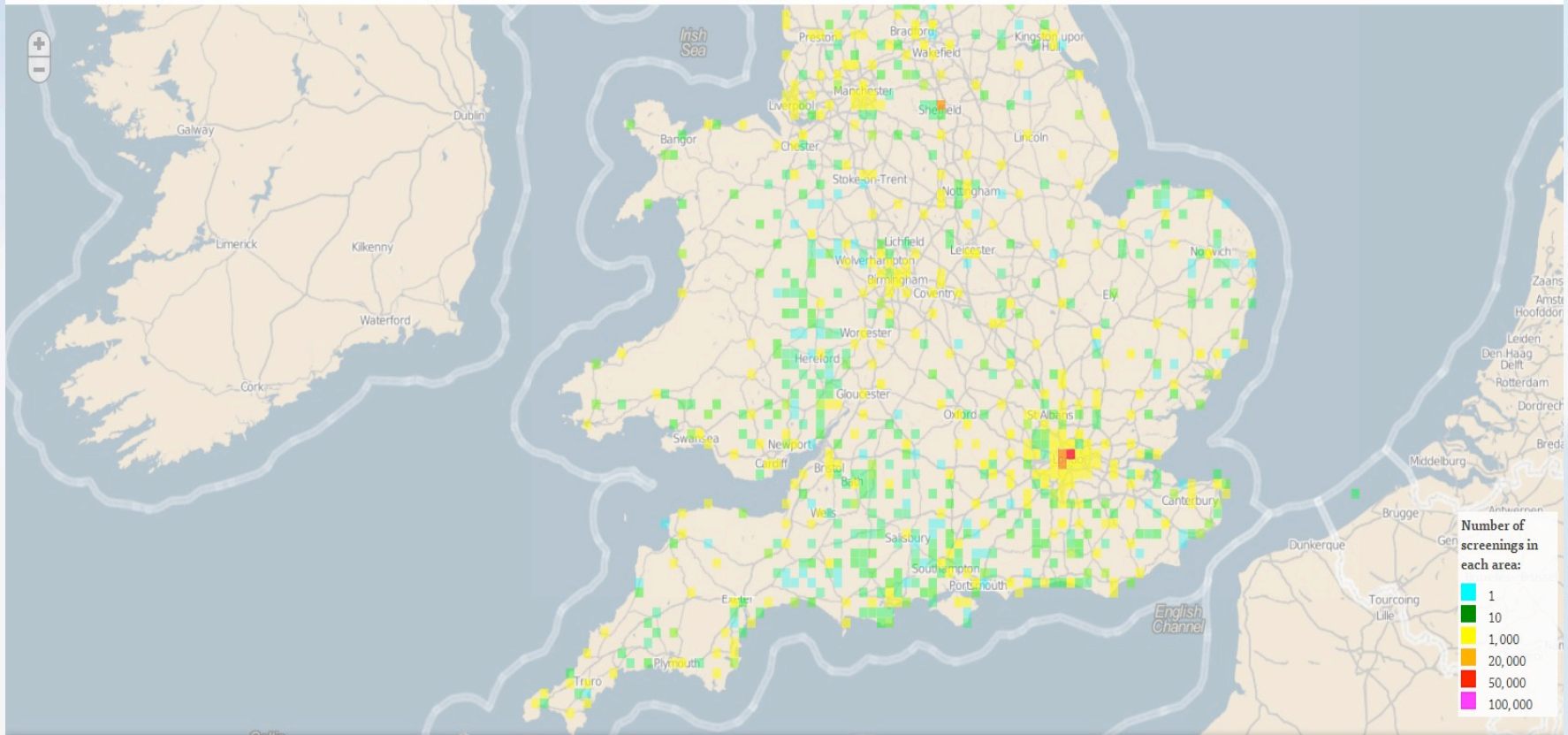
Here we present them on a heat map showing density of film screenings within a grid. Zoom in for more detail. Click or tap a grid square for a report.



Specialised film screenings in the UK in 2011

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Where specialised film was screened in 2011

La piel que habito (The Skin I Live In) Specialised A report of all of this film's UK screenings in 2011

Screened 4479 times in 2011.

Find another film



This film's run in 2011

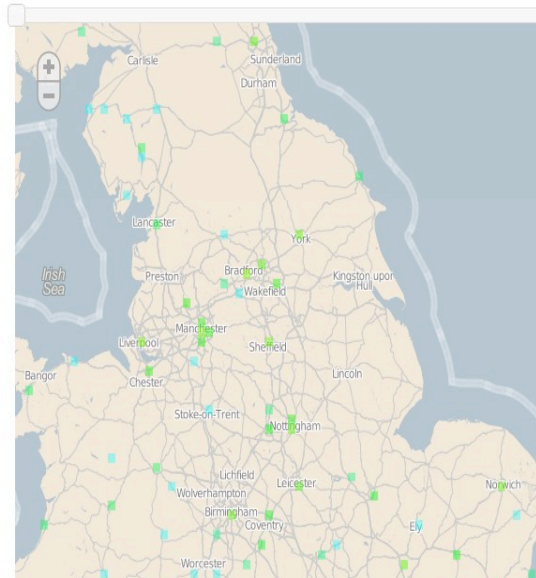


Inspired by Thierry Jonquet's novel "Tarantula", Pedro Almodóvar has produced a stunning revenge tale about a plastic surgeon on the hunt for the men who raped his daughter. Ever since his wife was burned in a car crash, Dr. Robert Ledgard, an eminent plastic surgeon, has been interested in creating a new skin with which he could have saved her. After twelve years, he manages to cultivate a skin that is a real shield against every assault. Robert needs a further three things to complete his project: no scruples, an accomplice and a human guinea pig.

Director
Pedro Almodóvar

Where this film was screened

Showing all weeks



Summary

- Theatrical market has remained robust despite massive changes in media consumption
- Market remains Hollywood dominated but there is an increased appetite for a wider range of film
- Data can be a powerful tool for public policy. Transparency of data will ultimately be for the benefit of all film stakeholders



Thank you

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