era

THE DIGITAL ENTERTAINMENT
AND RETAIL ASSOCIATION

2023

CONTENTS

TECHNOLOGY IS OUR FRIEND

BEN DRURY
CHAIR ERA

You have to go away to come back, said fantasy novelist Terry Pratchett, and I guess that's precisely what I've done as I return to ERA as Chair, seven years since I left the association.

The scale of the growth in the entertainment business over that time has been phenomenal.

The combined music, video and games businesses were worth just under £6bn in 2015. Updated figures for 2022 show that last year they were not far off twice that - £11.2bn

Maybe I should go away more often!

When my appointment was announced, I recalled that in my first stint at ERA, I was the association's first ever board member to represent the then new-fangled world of digital music.

There was initial resistance on all sides of the industry to this revolution, something which seems frankly ridiculous in retrospect.

The history of the entertainment business from the wax disc to the DVD to the games console is that, even more than content, it is technology which drives revenues.

That's why you can expect me as Chair to be an advocate of technology even if at first glance it may seem to threaten established ways of doing things. That means AI, virtual and augmented realities and the metaverse are definitely on our agenda. We need to embrace the opportunities they make possible even though we know that not all of them may succeed.

But I'm not a proverbial technology magpie, just attracted to the "bright shiny new things" of technological progress. I personally completely avoided cryptocurrency having never spent a single penny of real money on bitcoin et al. I also have been healthily sceptical of metaverse and web3 hype. Embracing the new does not of course mean we necessarily abandon older ways of doing things.

Despite the increasing presence of digital music, vinyl records have experienced a resurgence in recent years. More and more people are buying records as a way to enjoy their favourite songs in a physical format. Vinyl sales have grown steadily for the past decade, reaching their highest levels since the early 1990s. Music fans are attracted to the warm sound, the tangible experience of playing a record and the collector's item nature of owning a piece of music history. Even with the proliferation of digital music, it's clear there's still a place for vinyl in the modern world.

Back to technological advancement, the above paragraph was written by OpenAI and we can already see that 2023 will be defined by a "Cambrian Explosion" of AI development and tools. Many of these will lead to increased productivity and the emergence of amazing new products and services. There will be a dark side though, and the creative industries could be especially affected. I urge ERA members to educate themselves and try all these tools to understand the impact.

Much is quite rightly made of ERA's remarkable reinvention in which this previously 100% physical record store association now represents virtually all the major music streaming services, but the flowering of ERA's independent membership has also been a notable achievement.

I am proud to head an organisation which represents the largest multinational streaming services alongside the cream of the UK's indie record stores.

THE SCALE OF GROWTH IN THE ENTERTAINMENT BUSINESS HAS BEEN PHENOMENAL

A REMARKABLE 20 YEARS AT ERA

KIM BAYLEY
CHIEF EXECUTIVE ERA

When we announced at the top of the year that the entertainment market had reached an all-time high of more than £11.1bn, it was a statistic that meant more to me than most.

That's because the total was just over double the level of sales the business achieved in the year I first joined ERA, 2002.

That's remarkable in itself, but all the more so because all three of our sectors - music, video and games - were about to enter their pre-streaming, pre-mobile decline.

We didn't know it at the time, but music had already hit its physical peak in 2001, video would start its own decline in 2014 and even games - entertainment's greatest long-term success story - would essentially flatline between 2008 and 2013.

Which is essentially to say that in the first 10 years of my tenure, it was a story of decline for entertainment. As a sector we lost around a billion pounds of sales value.

The second 10 years, however, have been nothing less than a revelation - growth after growth after growth.

In line with that, ERA transformed itself to represent not just physical stores, but some of the largest digital companies in the world, at the same time seeing an incredible revival of what had been the most challenged physical stores of all, the indie record shops.

WHAT A RIDE IT HAS BEEN

Much as I enjoyed the tributes paid on my 20th anniversary at last year's AGM, I know of course that compared to the innovators and entrepreneurs who have driven entertainment's revival, ERA is a bystander rather than a principal, but, oh, what a ride it has been!

Our journey to that all-time-record high in 2022 was certainly an eventful one, supported by our ever-reliable office management team of Carole Lampard and Beth Perrin.

The year was dominated by the ongoing aftershocks of 2021's DCMS Select Committee Inquiry into Music Streaming. Notwithstanding the fact that the original report - and to be fair all subsequent reports - on the market essentially vindicated ERA's view that streaming has had an overwhelmingly positive impact for music fans and for the music industry, there was still much to be done.

The DCMS itself, working with the IPO, unleashed a whole series of work streams and working groups on issues around streaming, many of them still to report at the time of writing, while the Competition & Markets Authority undertook its own preliminary study of the market, again ultimately agreeing with our view that there were no grounds for a more detailed investigation.

Such studies and investigations, and to be blunt, threats of further regulation, formed a significant element of ERA's work in 2022.

In such circumstances, it's not sufficient simply to "know" that you're right. It's about the grinding committee work and endless meetings required to win hearts and minds.

The stars of this process have been our members, from senior executives to public policy professionals who have given so much time to this process.

Thanks should very definitely go to them. We remain confident that our commonsense view - that streaming services deserve bouquets rather than the brickbats which are often thrown their way - will prevail.

In connection with the post-Select Committee process, I would like to make special mention of our long-term strategic communications advisor Steve Redmond and recently-acquired political counsel Sir Robbie Gibb - their contributions have been invaluable.

Amid all the discussions of metadata and algorithms, physical retailers continued very much to ensure we kept our feet on the ground.

We mounted our second indie conference attended by over 200 shops and suppliers. It continues to go from strength to strength. Meanwhile Record Store Day, which is managed by ERA on behalf of the indie store community reaches new heights. It secured five sponsors in 2022, simultaneously helping to defray the costs of this unique promotion, while also helping it to achieve new levels of awareness. Combining credibility with mass appeal is the Holy Grail in these things and indicating that, like her, RSD has achieved both of them, one of the supremely credible pop stars of our age, Taylor Swift, agreed to be 2022's RSD ambassador.

Record Store Day has delivered many benefits, not least the inspiration it provided for the creation of our second great music promotion, National Album Day, which reached its fifth anniversary in 2022

Managing the terrific workload involved in putting these promotions together, Megan Page continued to do an outstanding job. For the past five years the yin to Megan's yang has been the wonderful Phoebe Scott. Phoebe has now moved on for a change of career to floristry. We send our very best wishes and thanks to her and extend a warm welcome to her replacement, Emily Quillin.

Alongside the big picture strategy and political work on the one hand and promotions on the other, research and insight lie at the core of ERA's service to members. Our long-time research guru, Luke Butler, now working in-house as Head of Research and Insight had another busy year, providing new quarterly updates for members and onboarding a new insight strand from Luminate which sits alongside our long-term tracking study with Fly Research.

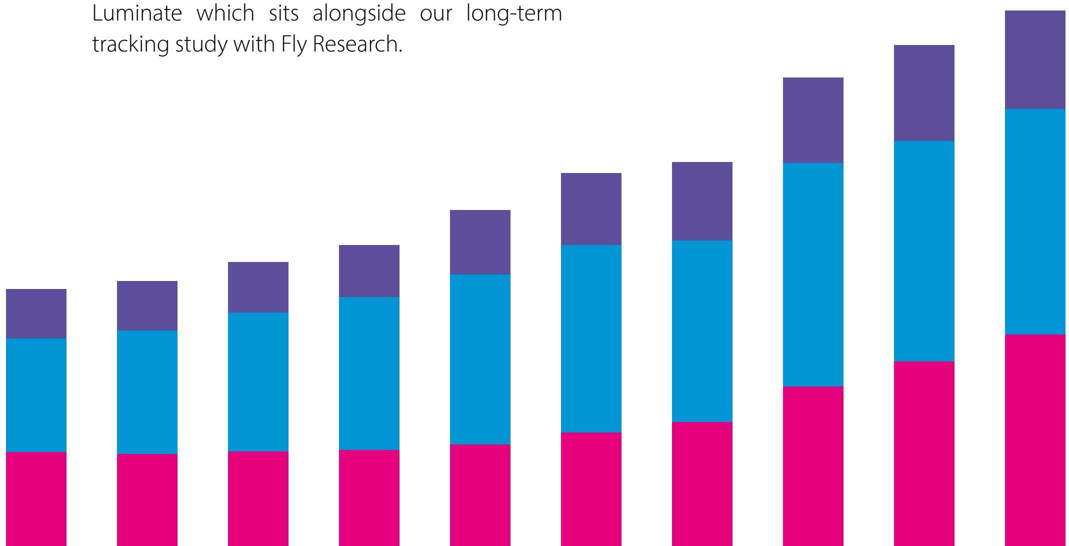
At the heart of our research service - and still a significant contributor to ERA's income - is the Official Charts Company, 50% owned by ERA alongside record companies trade association the BPI. In 2022 the Official Charts made a significant international breakthrough, now providing charts for France, as well as the UK and Ireland. Congratulations to them on making this significant step forward.

Our stake in the Official Charts Company, our strategy and our finances are all managed under the guidance of ERA's board. They continue to serve all our members well. On behalf of our entire membership, I thank them.

In 2023 they will conduct their business under a new Chair, Ben Drury, making his return to the ERA fold. Welcome to him. As our very first digital member all those years ago, Ben is a thread uniting the past and future of entertainment.

We are not short of challenges in 2023. The after-effects of the Covid-19 pandemic are still very much in evidence and the energy and cost of living impacts of Russia's invasion of Ukraine continue to cast a shadow over the economy.

But despite it all, we have good reason to continue to believe not just in the future of entertainment, but in its ability to get us through the present - whatever that may throw at us...



ALL-TIME HIGH REVENUE OF MORE THAN £11.1BN

MUSIC STREAMING

Spotify refreshes app icons

Amazon launches a live radio App Amp

SoundCloud buys AI music tagging stat up Musiio

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

Spotify buys Podsights and Chartable, podcast measurement tools

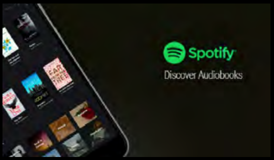
Apple buys AI Music, giving it music artificial intelligence capabilities

Spotify buys Heardle the wordle inspired music identification game

Driift, backed by Deezer, acquires Dreamstage, a live steaming platform

DREAMSTAGE

Spotify launches Audiobooks alongside music and podcasts, with listeners in the UK & Ireland are now able to access a library of more than 300,000 titles. Listeners are served curated recommendations and, once purchased, audiobooks will be automatically saved in a listener's library to listen whenever they want.



YouTube rolls out "Recap" on the main YouTube App.

YouTube

Amazon Prime Music makes 100 million tracks available to its users limited to shuffle mode (previously 2 million)

amazon Prime

Spotify rolls out Wrapped personalities

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

JANUARY

YouTube shorts extends use of licensed music to 60 seconds

YouTube

Amazon Music Live launches on Prime Video airing live streamed weekly concerts

Spotify acquires Kinzen. An AI tool to remove harmful podcasts

Kinzen by Spotify

Audius acquires Soundstage-fm, a virtual video environment

SOUNDSTAGE

Amazon Music App available on Sky glass

music

YouTube Music rolls out mood filters to allow users to find songs to match their moods

YouTube Music

VIDEO STREAMING

Prime Video Store launched its first Bonus X-Ray title with Spider: Man No Way Home, featuring in-video bonus content including a curated selection of trivia, behind-the scene videos and production set photos, as well as dynamic in-scene cast and music tagging.

prime video

Launch of Netflix in Virgin Media TV bundles

NETFLIX

Virgin media

Meeting customer demand for movie ownership, the introduction of a Premium EST format has given our customers the choice to either buy or rent the latest movies within their 'Premium window'

sky

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

Launch of 'Stream', Virgin Media's new flexible, and seamless TV and entertainment streaming service

Sky Cinema includes Paramount+ at no extra cost

Paramount+

Launch of Disney+ on Virgin Media Stream and TV 360 services

Disney+

VIRGIN TV 360

prime video

Top Gun: Maverick became Prime Video's fastest selling title ever, setting a new all-time record for first-week EST sales.

Amazon Freevee proudly announced the iconic series Neighbours will be returning to television with a brand-new series to begin filming in Australia in 2023. The cherished series will premiere exclusively on Amazon Freevee in the U.S. and UK with the world premiere slated for the second half of 2023. (Image)

freevee

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

Skys latest innovation on the Sky Glass platform, Sky Stream, gives customers access to the best entertinment streamed straight to any TV over WI-FI, without a dish, so there's no installation required. Simply plug the device into any TV to enjoy world class film, must-watch TV, movies and thrilling sport

Sky Store improve their VIP offering, with all VIP's given the choice of 2 great movies as part of their Christmas gift campaign – supporting their drive to encourage digital movie adoption

Sky VIP

STATISTICS

Luke Butler
ERA Head of Research
and Insight

HARRY STYLES TOPPED THE ALBUMS AND SINGLES CHARTS IN 2022

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RETAIL ENTERTAINMENT SALES

VALUE **£11.08bn**

YOY CHANGE **6.9%** ↑

DIGITAL V PHYSICAL MARKET SHARE

DIGITAL SHARE **91%** ↑

PHYSICAL MARKET SHARE **9%** ↓

ACCESS V OWNERSHIP

ACCESS SHARE **71%** ↑

OWNERSHIP SHARE **29%** ↓

NUMBER OF OUTLETS SELLING ENTERTAINMENT

MUSIC **2,486** ↓

VIDEO **2,916** ↓

GAMES **3,436** ↓

ENTERTAINMENT RETAIL IN CONTEXT

Consumer Leisure Spending

Each year the Leisure Industries Research Centre at Sheffield Hallam University produces figures measuring UK consumer spend across leisure activities, ranging from holidays and gambling, to eating out and home entertainment.

The 2022 figures reveal the UK's entertainment and leisure sectors ramping up activity after the pandemic-ravaged 2020 and sputtering recovery of 2021 tore into revenue streams across the board. As planes returned to the air, restaurants, gig venues, cinemas, gyms and sports centres re-opened and high street shops returned to normal, revenues – particularly 'Away from Home' – boomed.

Another dynamic that should be considered when reviewing these numbers is the impact of unusually high levels of inflation, commensurate with rapidly increasing consumer demand. The cost of food and fuel applied particularly strong upward pressure in the UK last year.

As global quarantine orders and other foreign travel restrictions lifted, the UK consumer returned to the seas and skies for holidays abroad in large numbers, with spending in the sector up 169.4% to £41.9bn. Domestic spend on 'Holidays in the UK' also enjoyed a significant bump, up 85.2% to £24.9bn. When you include 'Sightseeing' which also saw increased activity, £70.2bn was spent in the 'Holidays and tourism' category overall, up 124.5% versus 2021.

Staying with leisure 'Away from Home', consumers continued to celebrate the wider re-opening of bars and restaurants by spending a combined £160.3bn on 'alcoholic drinks' and 'eating out' in 2022 - up 32.5% year-on-year. Activity in the 'Neighbourhood Leisure' segment also grew strongly as venues and leisure centres returned to normal. Spend on 'Local Entertainment' 'Gambling' and 'Active Sport' combined hit £59.1bn, up 18.4%.

'In the Home' spend – which includes categories like 'House and Garden' and 'Hobbies and Pastimes' – soared during the lockdowns of 2020 and 2021. Naturally, as restrictions lifted, growth slowed, right across the segment, up just 1.9% year-on-year.

While declines in the annual value of the 'House and Garden' and 'Entertainment Hardware, TV, PCs' categories fell by 3.4% and 0.3% respectively, those reverses were offset by steady growth in 'Video, Games and Music' (£11.1bn / +6.9%), 'Reading' (£7.5bn / +1.5%) and 'Hobbies and Pastimes' (£18.9bn / +8.9%).

CONSUMER SPENDING ON LEISURE

£bn	2020	2021	2022	change 21/22
Video (all), Games and Recorded Music	9.7	10.4	11.1	6.9%
Entertainment Hardware, TV, PCs and Other	18.2	17.6	17.5	-0.3%
Total Home Entertainment	**28.0**	**27.9**	**28.6**	**2.4%**
Reading	7.2	7.4	7.5	1.5%
House and garden	22.1	24.6	23.8	-3.4%
Hobbies and pastimes	14.8	16.6	18.1	8.9%
IN THE HOME	**72.0**	**76.6**	**78.0**	**1.9%**
Eating out	44.4	60.1	87.4	45.4%
Alcoholic drink	52.9	60.8	72.9	19.8%
Eating and drinking	**97.3**	**121.0**	**160.3**	**32.5%**
Local entertainment	6.8	9.5	12.4	31.3%
Gambling	10.5	13.1	13.8	5.0%
Active Sport	21.7	27.3	32.9	20.3%
Neighbourhood leisure	**39.0**	**49.9**	**59.1**	**18.4%**
Sightseeing	1.2	2.3	3.4	50.0%
Holidays in UK	8.5	13.4	24.9	85.2%
Holidays overseas	13.8	15.5	41.9	169.4%
Holidays and tourism	**23.4**	**31.3**	**70.2**	**124.5%**
AWAY FROM HOME	**159.8**	**202.1**	**289.5**	**43.2%**
ALL LEISURE	**231.8**	**278.7**	**367.5**	**31.9%**

Source: Leisure Industries Research Centre, Sheffield Hallam University. Notes: Historical values may differ from previous editions due to ONS methodology revisions

Overall, UK consumers spent a total £367.5bn on leisure in 2022, up an impressive 32% versus last year and 59% versus 2020.

REVENUES HIT AN ALL TIME HIGH

Sales of over £11 billion, the biggest total for over a decade

ERA ENTERTAINMENT MONITOR 2022 - VALUE SALES (£m)

	2020	2021	2022	change 21/22
Videogames	4,651.5	4,560.3	4,664.4	2.3%
Video	3,342.2	3,875.7	4,432.2	14.4%
Music	1,734.9	1,928.9	1,986.9	3.0%
Total value	**9,728.6**	**10,364.9**	**11,083.4**	**6.9%**

Source: Music - Official Charts. Includes BPI/ERA subscription streaming consumer spend estimates. Subscription streaming in 2020/21 re-stated to reflect CMA report published in 2022. Video - Physical data from Official Charts / BASE, Digital estimates from Futuresource Consulting Videogames - Physical data from GfK. Digital estimates from Omdia

Total spend on music, video and games across the UK's entertainment retail and digital services grew for the tenth consecutive year in 2022, up 6.9% to a record £11,083.4m.

Despite strengthening economic headwinds and a crunch on consumer disposable income the entertainment sector delivered growth across all three of its core categories last year.

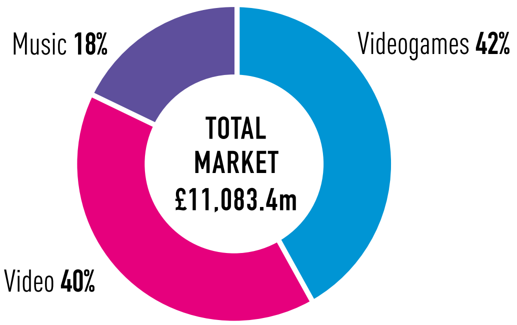
After experiencing a small reverse in annual revenues during 2021 spend on **Games** rebounded in 2022, up 2.3% to a record £4.7bn, driven by strong gains in digital downloads and Massive Multiplayer Online Game subscriptions. The category secured the biggest slice of the total entertainment pie with 42% of overall value.

After two years of pandemic-driven slowdowns 2022 saw the film and TV industries start to ramp up production again. This increase in fresh content helped build demand and drive spend in the **Video** category to record levels in the UK, soaring beyond the £4.4bn mark.

While blockbusters slowly returned to the big screen throughout the year, with cinemas enjoying an almost 60% year-on-year bump in attendance according to figures from the UK Cinema Association, the number of big hits remained well below pre-pandemic levels. With sell-through success heavily reliant on the theatrical pipeline, bankable new releases were thin on the ground for the UK's physical format retailers and transactional digital services throughout 2022, with spend stagnating across the sector.

Instead, it was down to the vibrant streaming channel to satisfy growing consumer demand for screen entertainment and power overall category growth. Price rises implemented at Netflix and increased subscription uptake at other major players like Amazon Prime Video and Disney+ saw streaming sector revenues climb again last year, more than offsetting losses suffered in the transactional channels.

ERA ENTERTAINMENT MONITOR: 2022 - (£M)



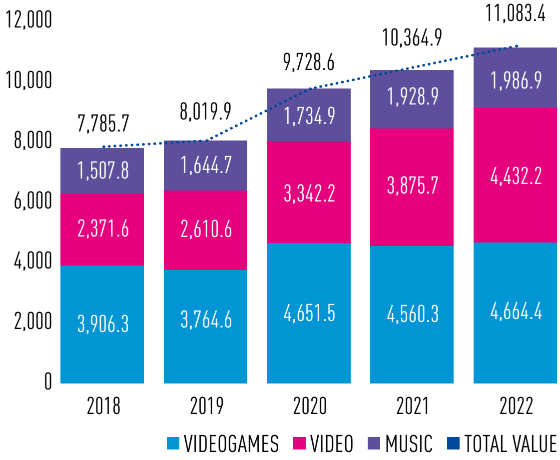
With consumer spend growing at record rates - up 14.4% versus 2021 and 32.6% versus 2020 – video grew its share of the total entertainment category, up from 37% to 40%.

After two years of intermittent high street shop closures and shuttered gig venues, 2022 ushered in a welcome return to normal trading conditions for the **Music** category. New release activity increased, live music rebooted, and footfall rose across the physical retail landscape helping to drive overall growth in album-equivalent consumption.

The dominant music streaming sector, driven by services like Spotify and Amazon Music, grew once again in both volume and value terms year-on-year, while the revival in vinyl album sales showed no signs of fatigue posting its 15th consecutive year of growth in 2022.

Almost £2bn was spent in the music category overall, 3.0% up versus 2021 representing 18% of total entertainment revenues.

CONSISTENT GROWTH



DIGITAL AND PHYSICAL FORMAT SPLITS

The trend of entertainment consumption in the UK shifting from physical to digital formats accelerated significantly over the course of 2020 and 2021as closures on the high street and disruptions to supply chains significantly impacted physical format product availability.

As trading conditions normalised over the course of 2022, so the heavy declines in overall spend on physical formats stabilised somewhat. After a posting an 18% year-on-year fall in value in 2021, spend on combined physical formats across music, video and games fell by just 6% in 2022.

The growth in spend on digital formats and on content served via digital channels continues to surge, bursting through the £10bn mark in 2022, up 8.4% year-on-year. Revenues generated from on-demand streams, digital downloads and online access across the music, video and games categories now represent 91% of total revenues generated in the entertainment retail and digital services market, up from 89% in 2021.

After the **music** category posted a welcome boost in spend across its physical formats in 2021 – the first year-on-year gain for 20 years - values fell back slightly last year. According to the Official Charts Company, combined spend on CDs, vinyl and legacy formats like cassettes amounted to £280.4m, down 3.8% versus 2021 but up versus 2020.

It is music's well-established digital market, however, that continues to dominate spend in the category. The digital music channel combines the sales of MP3 downloads with monthly fees paid to subscription-based services offered by companies like Spotify, Amazon Music, and YouTube Music. In 2022, over £1.7bn was spent on digital music in total, up 4.2% year-on-year.

While digital's share of the music market overall has grown to around 86%, the category derives a much bigger percentage of its revenues from physical formats than both the games and video categories, with 14% of the overall total generated by sales of CDs and vinyl.

Surging digital spend drove very strong overall gains for the **video** category in 2022. The digital channel in video – which combines monthly fees paid to subscription video on-demand streaming services (SVoD) like Netflix and Amazon Video with film and TV download sales (Electronic Sell Through) and one-off digital rentals (VoD) – was worth £4.2bn in 2022, up 16.2% versus 2021.

DIGITAL FORMATS (£m)

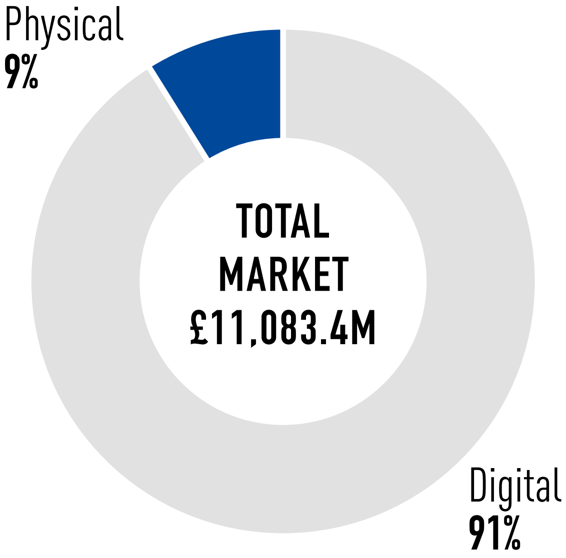
	2020	2021	2022	change 21/22
Videogames	4,005.8	4,048.8	4,175.8	3.1%
Video	2,971.4	3,627.2	4,213.2	16.2%
Music	1,463.2	1,637.4	1,706.4	4.2%
Total	**8,440.3**	**9,313.4**	**10,095.4**	**8.4%**

PHYSICAL FORMATS (£m)

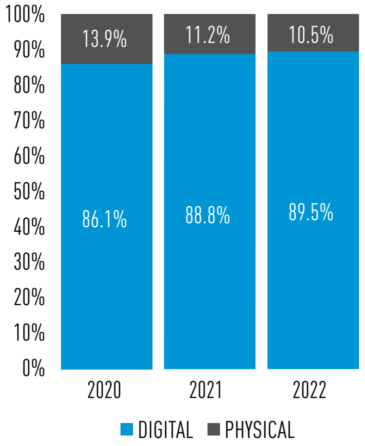
	2020	2021	2022	change 21/22
Videogames	645.7	511.5	488.6	-4.5%
Video	370.9	248.5	218.9	-11.9%
Music	271.6	291.5	280.4	-3.8%
Total	**1,288.2**	**1,051.5**	**988.0**	**-6.0%**

Source:
Music – Official Charts / ERA/BPI estimates.
Video – Physical - Official Charts / BASE. Digital – Futuresource Consulting
Games – Physical – GfK Entertainment. Digital – Omdia

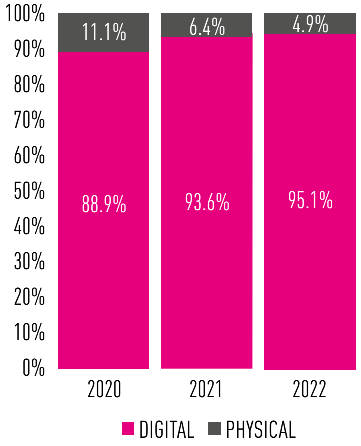
TOTAL ENTERTAINMENT RETAIL MARKET
Digital vs Physical 2022



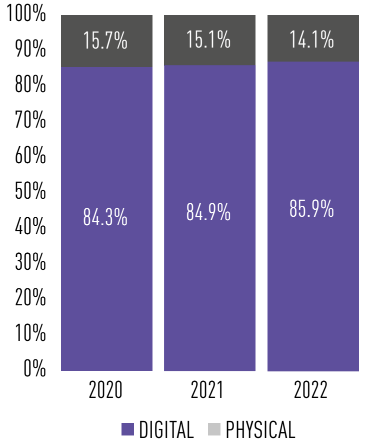
GAMES



VIDEO



MUSIC



Source:
Music - Official Charts. Includes BPI/ERA subscription streaming consumer spend estimates.
Subscription streaming in 2020/21 re-stated to reflect CMA report published in 2022
Video - Physical data from Official Charts / BASE, Digital estimates from Futuresource Consulting
Videogames - Physical data from GfK. Digital estimates from Omdia

Value generated in the UK by DVD and Blu-ray sales suffered another sharp fall last year according to the Official Charts Company, with spend dipping to £218.9m, down 11.9% versus 2021. While this obviously represents a significant reverse year-on-year it also represents a substantial slowdown in the rate of decline compared to the losses posted in 2021 when spend on physical video formats shrank by fully 33% versus 2020.

Stacking those booming digital revenues up against dwindling physical sales means that DVD and Blu-ray's share of the total video value pie has dipped again, down below 5% for the first time ever - the lowest physical share by some margin across the entertainment retail and digital services industry.

The **games** software market experienced a trend-busting dip in value during 2021 as it struggled to compete against the previous year's pandemic-driven explosion in spend witnessed during the early months of the lockdown. In 2022, the category posted a welcome return to growth, driven by solid gains in the vast digital channel. Omdia report that £4.2bn was spent on full-game downloads, downloadable content (DLC), console subscriptions and mobile gaming over the course of the year, £127m, or 3.1% up on 2021 totals.

The UK's physical boxed games software market also suffered in 2021, posting annual declines of more than 20% in value terms. Reverses of just 4.5% in 2022, then, represent something of a recovery. According to figures from GfK Entertainment, £488.6m was spent on physical games last year, representing 10.5% of combined physical and digital software value.

ACCESS VERSUS OWNERSHIP

In 2022, almost £7.9bn was spent to access on-demand entertainment, up 9.5% year-on-year. The access channel now represents 71% of total annual market spend. Over the same period, spend on physical and digital ownership formats also grew, albeit by a smaller rate, up 1.2% to £3.2bn.

On-demand video once again posted strong growth in 2022. Spend on subscriptions to services like Netflix, Disney+ and Now TV - combined with one-off rental payments to watch content from providers like Sky Store and Amazon Video - rose to almost £4bn, up 17% year-on-year. This amounts to just over 90% of total video value in 2022.

The share of overall spend secured by the category's ownership formats fell below 10% for the first time since ERA began measuring access vs ownership splits. Just over £440m was spent on DVDs, Blu-rays and digital downloads, down 5.3% versus 2021, securing just 9.9% of the total.

Very similar dynamics played out in the music sector in 2022. The category's ownership formats posted a 6% decline as reverses in CD and MP3 digital download sales offset the continued growth in spend on vinyl products. Worth £325.8m combined, spend on music's transactional formats now represent 16.4% of the category total. In contrast, the on-demand music streaming sector continues to tick upwards, finishing at just under £1.7bn in 2022. That's up a healthy 5% year-on-year, representing around 84% of the total music market.

The shift to access models in games has been a much slower process when compared to entertainment's other categories and, in 2022, that trend actually reversed in terms of share of overall category value secured. Comprised mostly of console subscriptions, MMOG micro-transactions and mobile and tablet in-app purchases, access spend is now worth approximately £2.2bn, up a marginal 0.9% versus 2021.

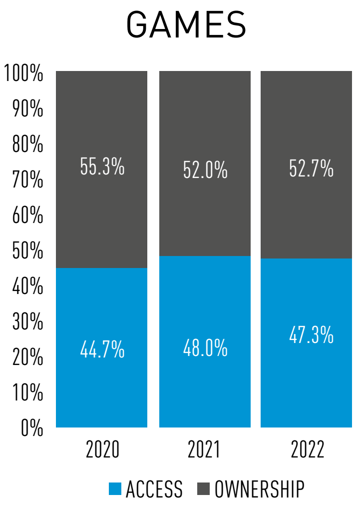
Despite that small boost in value and falls in physical disc sales, a rebounding full-game download market and increased spend on digital downloadable content saw the value of ownership formats outpace access, rising by 3.6% to almost £2.5bn in 2022. Ownership share of the games market has risen to 52.7%, with access falling to 47.3%.

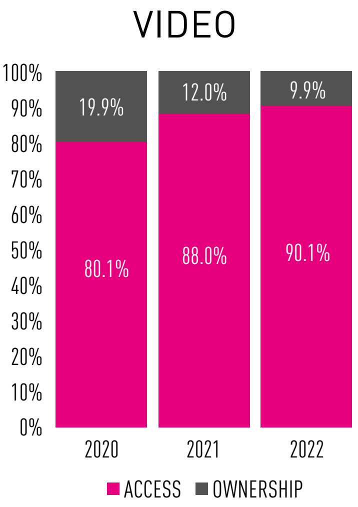
ACCESS (£ MILLION)

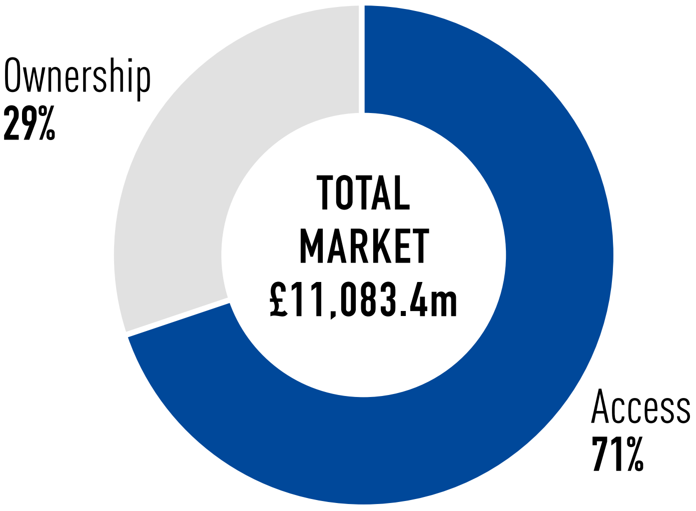
	2020	2021	2022	change 21/22
Videogames	2,081.5	2,187.8	2,206.9	0.9%
Video	2,675.7	3,410.9	3,991.9	17.0%
Music	1,391.0	1,582.3	1,661.1	5.0%
Total	**6,148.3**	**7,181.0**	**7,859.9**	**9.5%**

OWNERSHIP (£ MILLION)

	2020	2021	2022	change 21/22
Videogames	2,570.0	2,372.5	2,457.5	3.6%
Video	666.5	464.9	440.2	-5.3%
Music	343.8	346.6	325.8	-6.0%
Total	**3,580.3**	**3,183.9**	**3,223.5**	**1.2%**







Source:
Music - Official Charts. Includes BPI/ERA subscription streaming consumer spend estimates
Video - Physical data from Official Charts / BASE, Digital estimates from Futuresource Consulting
Videogames - Physical data from GfK. Digital from Omdia

GAMES


GOAT
PARIS
PARIS
CHAMPIONS LEAGUE
adidas
OFFICIAL MATCH BALL

RETAIL SALES OF GAMES SOFTWARE

VALUE **£4,664m**

YOY CHANGE **2.3%** ↑

DIGITAL SALES

VALUE **£4,176m**

YOY CHANGE **3.1%** ↑

PHYSICAL SOFTWARE SALES

VALUE **£489m**

YOY CHANGE **4.4%** ↓

RETAIL SALES OF GAMES HARDWARE

VALUE **£825m**

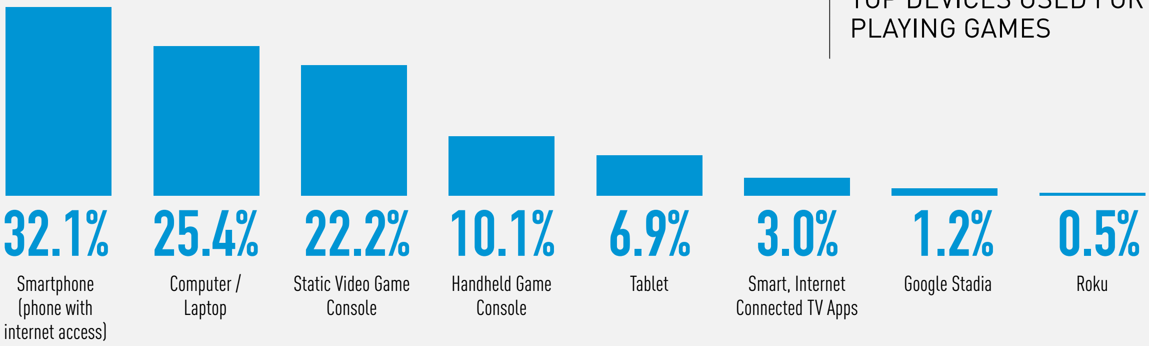
YOY CHANGE **26.9%** ↓

FIFA 23 TOPPED THE GAMES CHARTS WITH SALES OF 2.5M UNITS

MEET THE GAMES CONSUMER

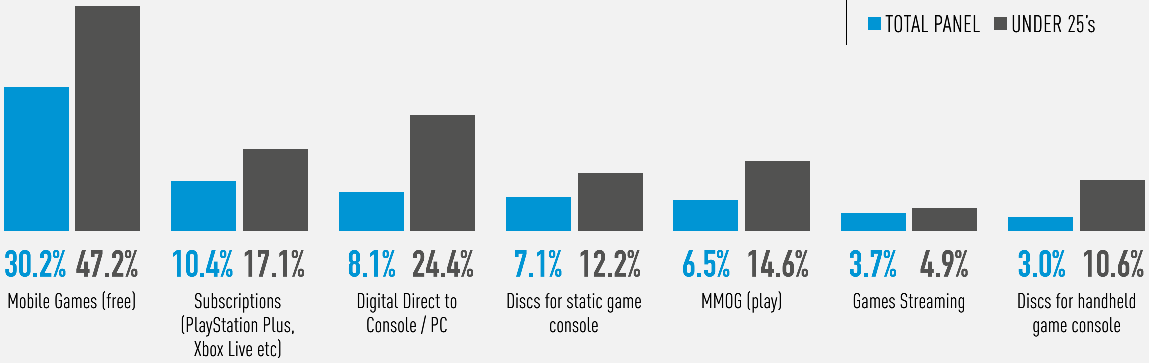
TOP DEVICES USED FOR PLAYING GAMES

The Smartphone is the most popular device used for playing games



GAMING CONSUMPTION PREFERENCES

Free gaming on mobile devices is the most popular way to play while direct to console is the most popular way to own



WHERE DIGITAL GAMERS BOUGHT

Steam continues to lead the way as an online purchasing destination but PlayStation Store is right on its heels

50.5% Steam (PC Games)

37.9% Playstation Store

18.9% Microsoft / Xbox Store

17.9% Nintendo eShop

7.4% Amazon

5.3% Game.co.uk

3.2% Origin

11.6% Other

Source: ERA Quarterly Tracking Study (November 2022) (conducted by FlyResearch)

GAMES MARKET SOFTWARE OVERVIEW

After the unprecedented, lockdown-driven surge in spend witnessed in 2020, 2021 saw the games software market undergo a minor adjustment downwards, declining by 2% year-on-year. The pre-2021 growth trend was re-established in 2022 with spend amounting to almost £4.7bn, up 2.3% versus 2021 and marginally ahead of the record 2020 totals.

According to Omdia, the steepest gains in the category were to be found in the download-to-own console game market, with sales up 12.2% to £724.9m, while the huge 'mobile & tablet' segment – which includes mobile downloads and In-app purchases - continued its uninterrupted run upwards, with spend totals approaching £1.5bn, up 3.2% year-on-year.

The complex 'Other digital and online' segment – where spend on casual PC, MMOG microtransactions, DLC and console subscriptions is measured – delivered a steady performance in 2022, with revenues up by a marginal 0.2% to £1.7bn.

According to GfK Entertainment, annual spend on full-game, physical boxed software titles in 2022 fell below the £500m for the first time since 1996. £488.6m was spent in total, down 4.4% year-on-year. In comparison to 2021, however – when total annual values fell by 20% - this represents something of a brake on the pace of trending decline seen over the last 14 years.

ENTERTAINMENT SOFTWARE - VALUE (£MILLION)

	2020	2021	2022	change 21/22
Home Console Software	638.5	507.8	487.0	-4.1%
Handheld Software	2.7	0.9	0.4	-59.7%
PC Software	4.5	2.1	1.2	-42.6%
Total Full-Game Physical Software	**645.7**	**510.9**	**488.6**	**-4.4%**
Digital Console Full-Game	725.8	646.0	724.7	12.2%
Digital PC Download-to-Own	243.5	217.4	216.8	-0.3%
Total Full-Game Digital Software	**969.3**	**863.4**	**941.5**	**9.1%**
Other Digital and Online	1,674.3	1,744.3	1,747.4	0.2%
Mobile and Tablet	1,362.2	1,441.2	1,486.8	3.2%
Total Digital Games	**4,005.8**	**4,048.8**	**4,175.8**	**3.1%**
Total Games	**4,651.5**	**4,559.7**	**4,664.3**	**2.3%**

ENTERTAINMENT SOFTWARE - VOLUME (MILLION)

	2020	2021	2022	change 21/22
Home Console Software	18.4	14.8	13.3	-9.9%
Handheld Software	0.3	0.1	0.0	-74.6%
PC Software	0.1	0.1	0.0	-51.3%
Total Full-Game Physical Software	**18.8**	**15.0**	**13.4**	**-10.4%**
Total Digital Console Full-Game and PC Download-to-Own	**66.3**	**61.0**	**62.0**	**1.6%**
Total Games Software	**85.1**	**76.0**	**75.4**	**-0.7%**

Source: Physical Games: GfK Entertainment
Digital / Online / Mobile Games: Omdia estimates
Other Digital & Online includes Subscriptions, DLC, Micropayments, Casual MMOG, Social
Mobile / Tablet includes Downloads and IAP
Only combined volume data available for Digital Console Full-Game and Digital PC Download-to-Own

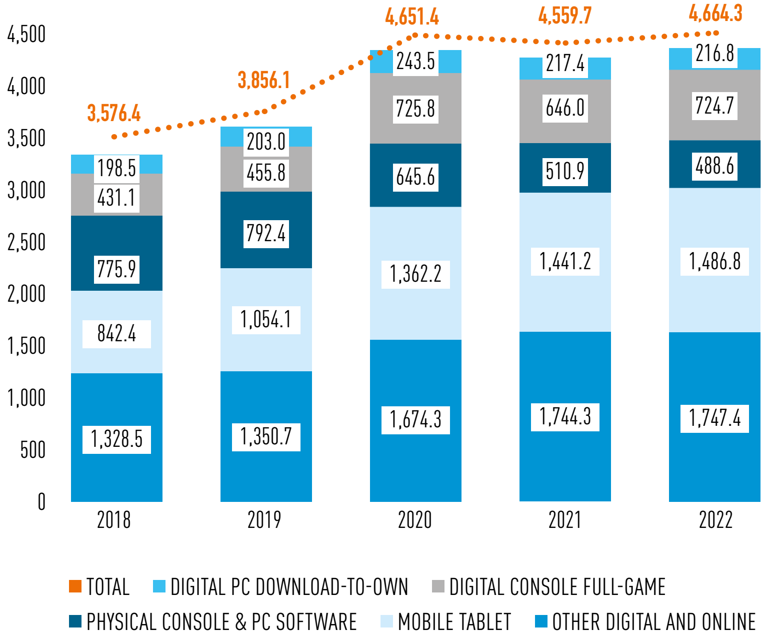
GAMES MARKET SALES BY SEGMENT

The adjacent graphs reveal just how important the diverse 'Other digital and online' segment is to wider games category performance. This is where all casual gamer-spend across PC browsers and social channels is measured, while also including the almost £1bn spent on millions of downloadable content transactions for console games. Combined, the segment secured around 37% of total category spend.

The 'mobile and tablet' segment is similarly characterised, with masses of very small transactions aggregating to very big overall spend totals. Omdia estimate that almost £1.5bn was spent on mobile games content last year, representing 32% of the market total.

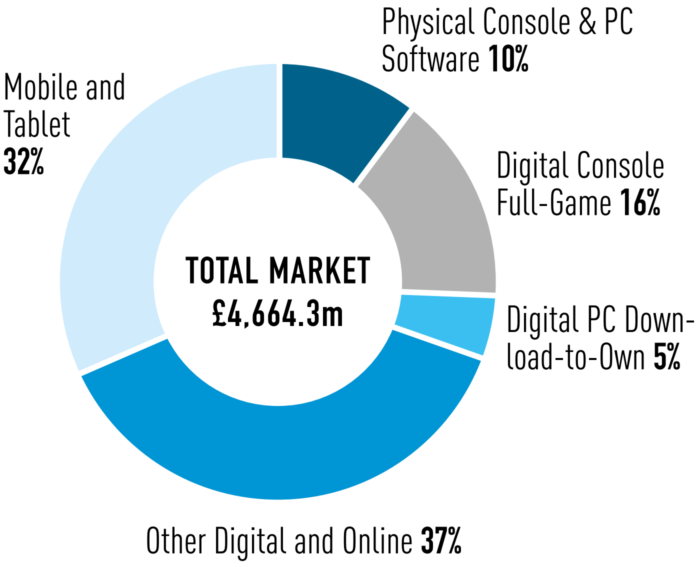
Just over £940m was spent on full-game digital console and PC download-to-own titles combined in 2022, amounting to 21% of total spend on games, while declining sales in the physical disc software segment – once the undisputed powerhouse of the category - saw its share of the market dip marginally below around 10% of the total.

GAMES MARKET BY SEGMENT
2018-2022 (£M)



Source: Physical Games: GfK Entertainment. Digital / Online / Mobile Games: Omdia
Note: Other Digital & Online includes Subscriptions, DLC, Micropayments, Casual MMOG, Social
Mobile / Tablet includes Downloads and IAP

GAMES SOFTWARE VALUE 2022:
SHARE BY SEGMENT



GAMES MARKET DIGITAL

Spend on digital games amounted to around £4.2bn in 2022, up 3.1% year-on-year.

The UK's digital games market has returned consistent year-on-year growth over the last 20 years, driving the entire games category upwards, ever since 2013 when it overtook physical disc software in terms of revenues generated.

Four of the six of the major digital segments – mobile / tablet, console DLC, console full-games and MMOGs – all delivered year-on-year gains with only the PC DTO, social and console subscription components declining in value.

The largest digital games segment – mobile / tablet gaming - driven almost entirely by the In-App-Purchase markets which form over 97% of transactional revenues – enjoyed a more than 3% bump in spend in 2022, rapidly closing in on the £1.5bn mark.

After a 10% decline in sales value in 2021, full-game console downloads returned to growth in 2022, up 12.2% year-on-year, with total spend of £724.7m almost exactly level with the extraordinary numbers delivered during the lockdown-affected 2020.

Strong uplifts in full-game purchasing often drives incremental spend on linked content that enhances, augments or lengthens the gaming experience. In 2022, Omdia estimate that close to £1bn was spent on DLC console content, up 3.5% year-on-year.

The Massive Multiplayer Online Games market – or MMOGs – combines online spend on accessing the games via subscriptions, with the microtransactions executed once playing. Spend on both elements grew in 2022 driving combined value up 5.9% to £377m.

DIGITAL GAMES - VALUE (£MILLION)

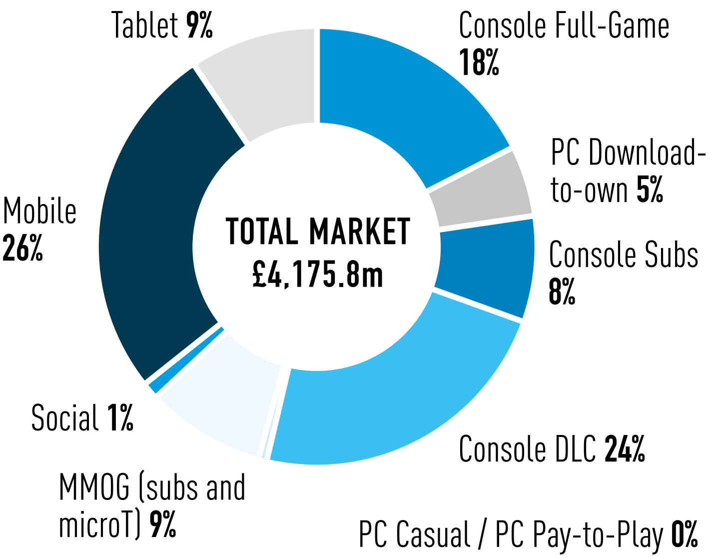
	2020	2021	2022	change 21/22
Console Full-Game	725.8	646.0	724.7	12.2%
PC Download-to-Own	243.5	217.4	216.8	-0.3%
Console Subs	351.7	368.5	328.0	-11.0%
Console DLC	900.3	948.4	981.4	3.5%
PC Casual (sales & subs) / PC Pay-to-Play	21.0	15.9	13.5	-14.9%
MMOG (subs & microT)	337.4	356.3	377.1	5.9%
Social	63.8	55.2	47.3	-14.3%
Total Digital & Online	**2,643.6**	**2,607.6**	**2,688.9**	**3.1%**
Mobile	993.9	1,059.7	1,097.7	3.6%
Tablet	368.3	381.6	389.1	2.0%
Total Mobile & Tablet	**1,362.2**	**1,441.2**	**1,486.8**	**3.2%**
Total Digital Games	**4,005.8**	**4,048.8**	**4,175.8**	**3.1%**

DIGITAL GAMES - VOLUME (MILLION)

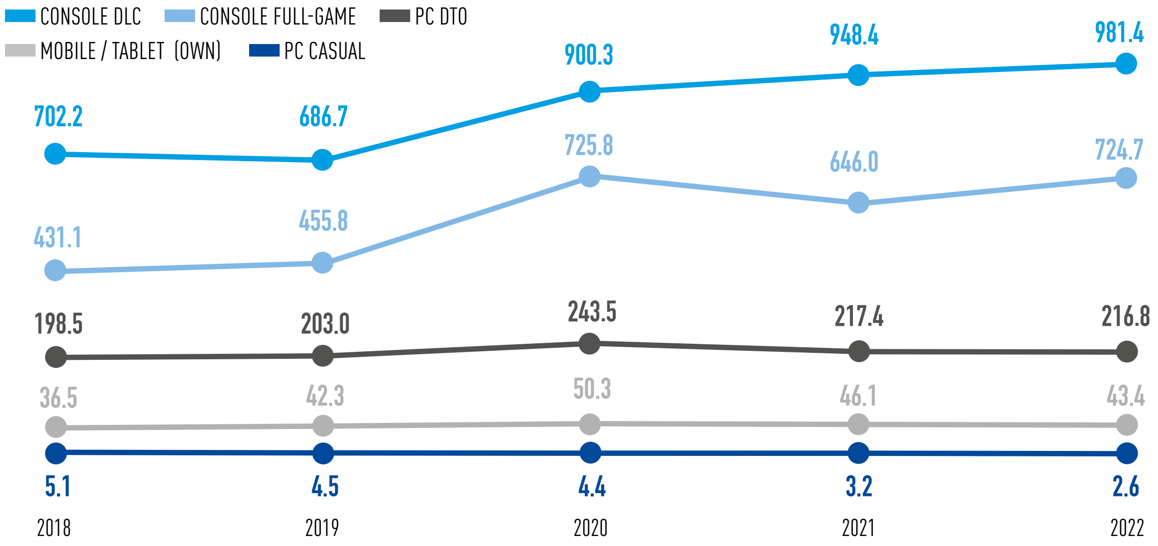
	2020	2021	2022	change 21/22
Console Full-Game & PC Download to Own	**66.3**	**61.0**	**62.0**	**1.6%**

Sources: Omdia Note: Mobile / Tablet includes Downloads and IAP
Only combined volume data available for Digital Console Full-Game and Digital PC Download-to-Own

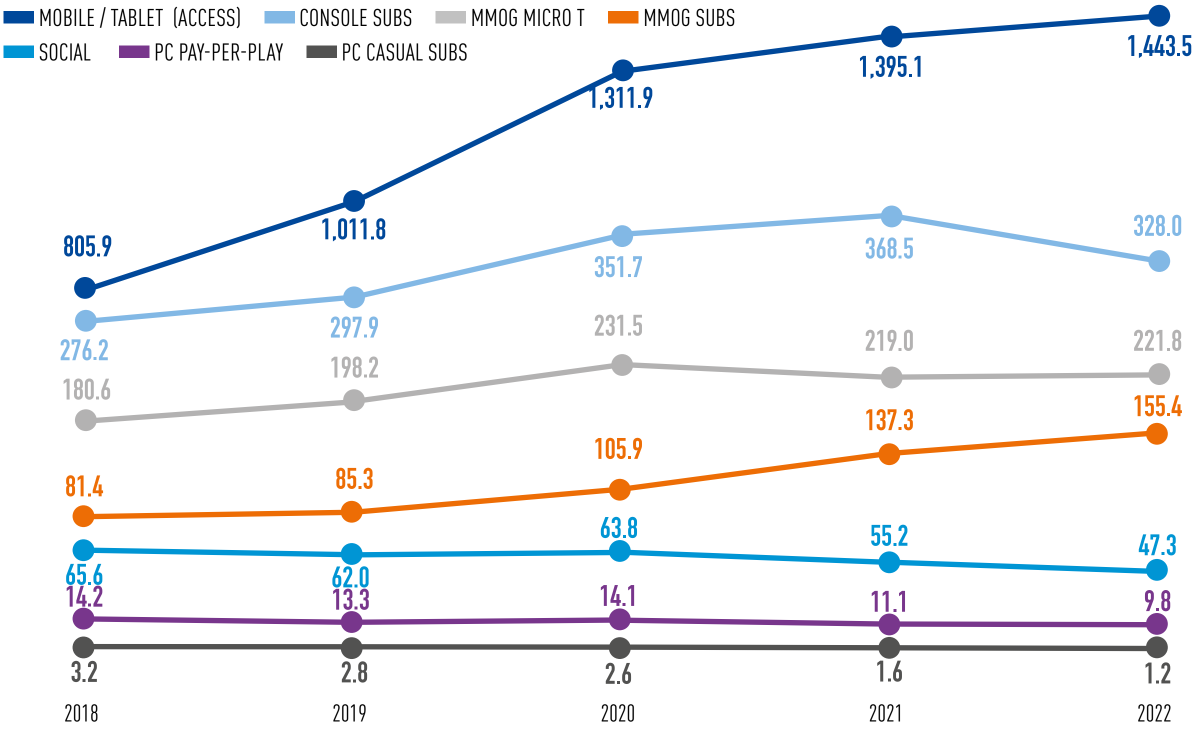
DIGITAL GAMES MARKET BY SEGMENT: 2022



DIGITAL GAMES OWNERSHIP SEGMENTS (£ MILLION)



DIGITAL GAMES ACCESS SEGMENTS (£ MILLION)



Sources: Omdia Note: Mobile includes Smartphone & Tablet

GAMES MARKET PHYSICAL

Putting aside the Covid-driven bounce in 2020, the physical entertainment software market has been in long-term decline, with consumers increasingly turning to full-game digital downloads, subscriptions and cloud gaming for their core content over the last decade or so.

Some sales resilience was evident over the course of 2022 as PS5 and Xbox Series hardware penetration improved slowly, boosting sales of linked console disc titles. This cyclical renewal of the software market, traditionally driven by new console technology, saw Sony's PS5 disc sales jump to £147.1m, up 57.2% versus 2021, while Xbox Series sales moved beyond the £35m mark, up 32.7% year-on-year.

While that PS5 sales growth easily outpaced the rates of decline in spend on PS4 games last year, Xbox Series sales lagged significantly behind, with 2022 totals nowhere near enough to offset Xbox One declines.

Coupled with the hitherto all-conquering Nintendo Switch games market finally displaying some signs of fatigue - sales declined to £214m, down 9.3% versus 2021 - the overall physical software market resumed its steady drift downwards, posting a 4.4% year-on-year reverse, dipping below the £500m for the first time since 1996.

GAMES: PHYSICAL ENTERTAINMENT SOFTWARE - VALUE (£MILLION)

	2020	2021	2022	change 21/22
Sony Playstation 5 (PS5)	30.3	93.6	147.1	57.2%
Sony Playstation 4 (PS4)	240.7	107.3	72.0	-32.9%
Microsoft Xbox Series	5.2	26.8	35.5	32.7%
Microsoft Xbox One	113.2	43.9	17.9	-59.1%
Nintendo Switch	247.9	235.9	213.9	-9.3%
Other	1.2	0.5	0.5	-8.9%
Total Home Console	**638.5**	**507.8**	**487.0**	**-4.1%**
Nintendo 3DS	2.7	0.9	0.4	-60.1%
Total Handheld Console	**2.7**	**0.9**	**0.4**	**-60.1%**
PC	4.5	2.1	1.2	-42.6%
Total Physical Games Software	**645.7**	**510.9**	**488.6**	**-4.4%**

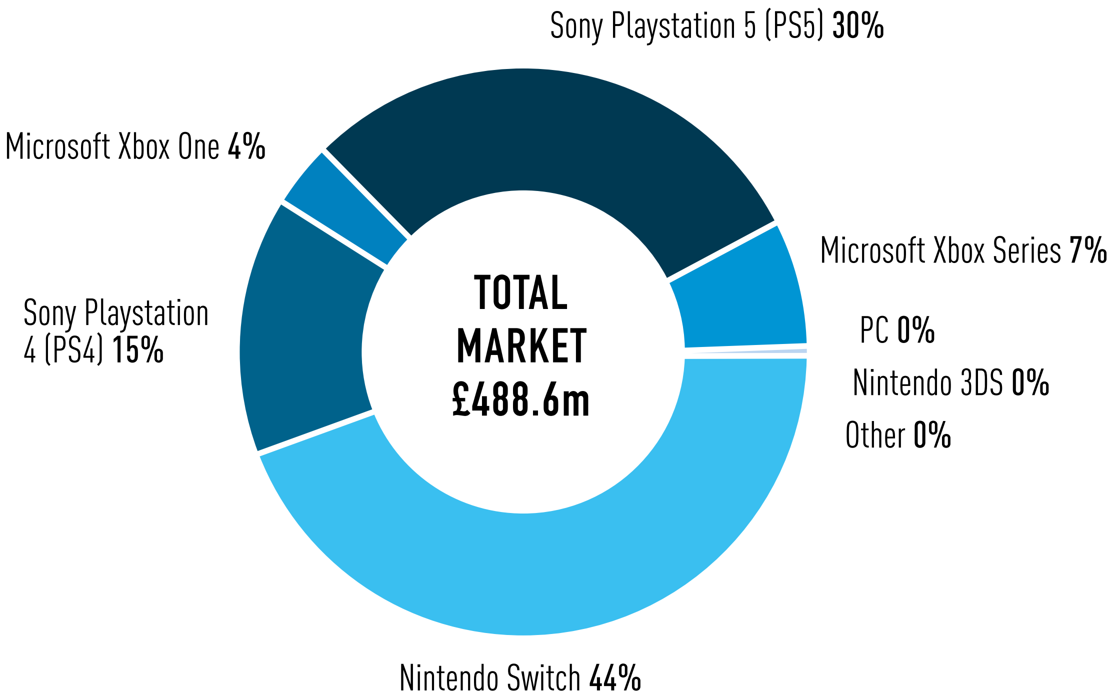
Physical Games: GfK Entertainment

GAMES: PHYSICAL ENTERTAINMENT SOFTWARE - VOLUME (MILLION)

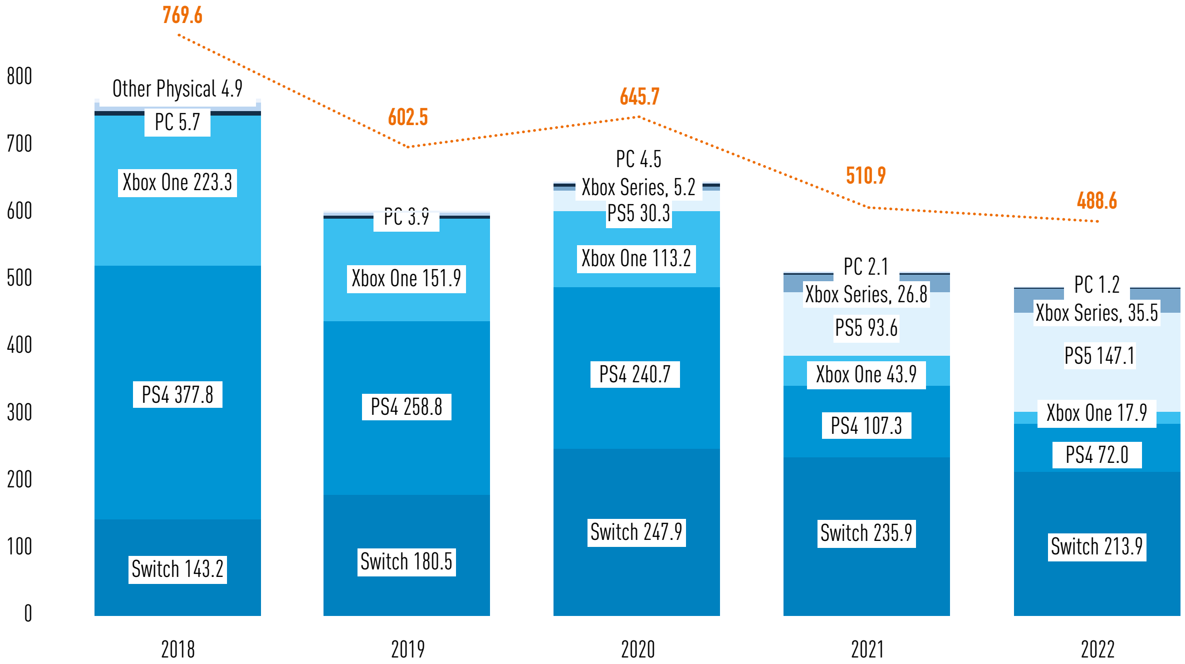
	2020	2021	2022	change 21/22
Sony Playstation 5 (PS5)	0.5	2.0	3.0	50.1%
Sony Playstation 4 (PS4)	7.3	3.7	2.3	-39.3%
Microsoft Xbox Series	0.1	0.6	0.9	43.2%
Microsoft Xbox One	3.5	1.5	0.6	-58.6%
Nintendo Switch	6.9	7.0	6.6	-5.4%
Other	0.1	0.0	0.0	-13.4%
Total Home Console	**18.4**	**14.8**	**13.3**	**-9.9%**
Nintendo 3DS	0.3	0.1	0.0	-75.5%
Total Handheld Console	**0.3**	**0.1**	**0.0**	**-74.6%**
PC	0.1	0.1	0.0	-51.3%
Total Physical Games Software	**18.8**	**15.0**	**13.4**	**-10.4%**

Physical Games: GfK Entertainment

PHYSICAL GAMES MARKET BY FORMAT (£ MILLION): 2022



PHYSICAL GAMES SPEND 2018-2022 (£ MILLION)



GAMES MARKET BRANDS

Combining disc sales across all the available platforms under the Nintendo, Sony and Microsoft umbrellas, 2022's 'Battle of the Brands' saw Sony regain top spot. Burgeoning PS5 disc sales helped Sony secure 45% of total physical games spend, supplanting Nintendo whose share dipped to 44%. Microsoft share of the market continues to slip, falling from 14% to 11% in 2022.

BATTLE OF THE BRANDS - SOFTWARE SALES BY BRAND. VALUE (£M)

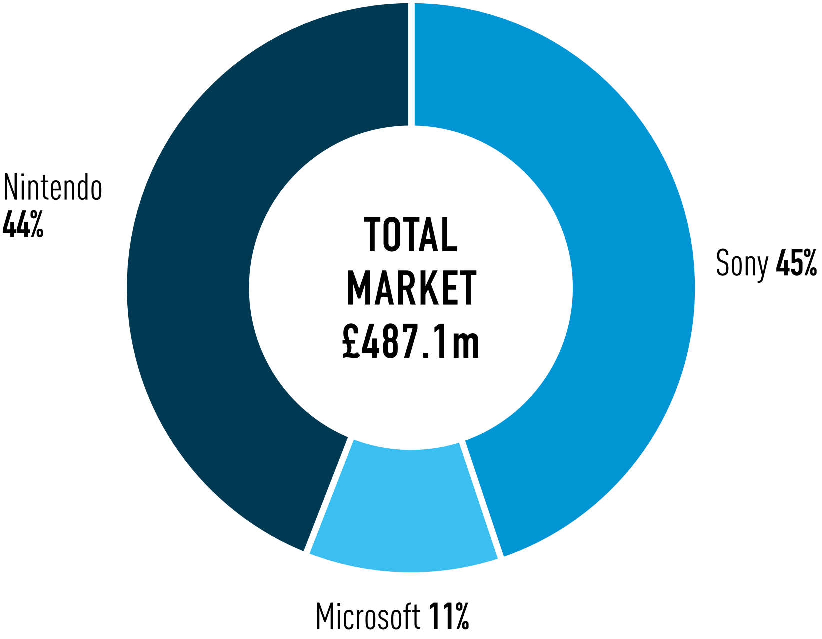
	2020	2021	2022	change 21/22
Sony	271.2	201.0	219.3	9.1%
Microsoft	118.7	70.8	53.5	-24.4%
Nintendo	251.2	236.8	214.3	-9.5%

BATTLE OF THE BRANDS - SOFTWARE UNITS BY BRAND. UNITS (M)

	2020	2021	2022	change 21/22
Sony	7.8	5.7	5.2	-8.2%
Microsoft	3.6	2.1	1.5	-29.9%
Nintendo	7.2	7.0	6.6	-5.9%

Source: GfK Entertainment
All SW for consoles formats, not just first-party titles

BATTLE OF THE BRANDS: 2022



GAMES MARKET HARDWARE

2.4 million games consoles were sold in the UK during 2022, 29% down on 2021 totals. In terms of value, £825m was spent, down 27% year-on-year.

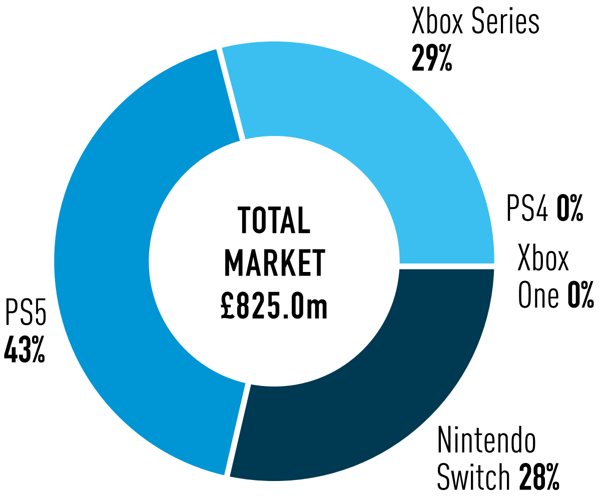
The global chip shortage - that has affected the availability of the industry's frontline games consoles for more than two years – continued to restrict supply through 2022.

The Nintendo Switch remains the UK's most popular console with around 880k sold over the course of the year, delivering £231.7m through the tills. These numbers are, however, significantly down on 2021 totals: -28% in volume and -24% in value.

While selling fewer units, Sony's PS5 generated the highest revenues last year - £350m from 780k units – but, again, this performance was well down on 2021levels, -33% in volume and -31% in value.

After a slow start from its 2020 launch, Microsoft's Xbox Series console sales finally built some momentum during the latter stages of 2021, with more than £284m spent over the course of the year. Sales declined in 2022 though, with 723k units sold generating £242.5m, 14.6% down year-on-year.

GAMES HARDWARE MARKET (£ MILLION): 2022



GAMES: TOTAL HARDWARE VALUE (£MILLION)

	2020	2021	2022	change 21/22
Sony Playstation 5 (PS5)	191.0	505.5	350.0	-30.8%
Sony Playstation 4 (PS4)	99.6	34.3	0.8	-97.7%
Microsoft Xbox Series	117.7	284.1	242.5	-14.6%
Microsoft Xbox One	66.8	1.0	0.0	-99.5%
Nintendo Switch	367.4	303.7	231.7	-23.7%
Other	0.1	0.0	0.0	-65.2%
Total Home Console	**842.5**	**1,128.5**	**825.0**	**-26.9%**
Total Handheld Console	**0.5**	**0.0**	**0.0**	**-41.3%**
Total Console	**843.0**	**1,128.5**	**825.0**	**-26.9%**

GAMES: TOTAL HARDWARE VOLUME (MILLION)

	2020	2021	2022	change 21/22
Sony Playstation 5 (PS5)	0.5	1.2	0.8	-32.6%
Sony Playstation 4 (PS4)	0.4	0.1	0.0	-97.7%
Microsoft Xbox Series	0.3	0.8	0.7	-14.7%
Microsoft Xbox One	0.3	0.0	0.0	-99.4%
Nintendo Switch	1.5	1.2	0.9	-27.5%
Other	0.0	0.0	0.0	-98.5%
Total Home Console	**3.0**	**3.4**	**2.4**	**-28.9%**
Total Handheld Console	**0.0**	**0.0**	**0.0**	**-59.9%**
Total Console	**3.0**	**3.4**	**2.4**	**-28.9%**

Source: GfK Entertainment. Excludes TV Console/Micro Console/Retro Console. Revenue based on SPLIT HW revenue.

Hardware SPLIT revenue - due to the fact that units/revenue from Consoles is split, some revenue from Hardware Bundles is counted under Software or Accessories and 1 unit of the software element / accessories element is also split.

The SPLIT revenue for Hardware is shown above, because if you sum the total SW-HW-ACC you arrive at the true total. If we put UNSPLIT harware revenue in these figures, there would be double-counting for total revenue.

GAMES MARKET ACCESSORIES

In lockstep with the console market, sales of controllers, headsets, and other gaming peripherals, which comprise the hardware accessories market, also posted double-digit declines in 2022. According to GfK Entertainment, 11.5m accessory units were sold worth £530.7m, down 13% year-on-year.

TOTAL GAMING ACCESSORY VALUE (£ MILLION)

	2020	2021	2022	change 21/22
Total Console	452.0	461.4	395.7	-14.2%
Total PC	119.5	148.2	135.0	-8.9%
Total	**571.6**	**609.6**	**530.7**	**-13.0%**

TOTAL GAMING ACCESSORY UNITS (MILLION)

	2020	2021	2022	change 21/22
Total Console	12.0	10.8	9.3	-14.4%
Total PC	2.0	2.4	2.3	-6.6%
Total	**14.1**	**13.2**	**11.5**	**-13.0%**

Source: GfK Entertainment - Traditional Gaming Accessories. Excludes Digital Content / Toy / VR.

AVERAGE SELLING PRICES

A post-pandemic rebound in the games new release market last year delivered a bump in average selling prices across both the physical retailer landscape and digital channels.

According to figures from GfK Entertainment, the average cost of a boxed game was £36.47, 6.7% higher than in 2021. According to Omdia, the average selling price of a full-game digital unit – across PC and console – rose by 7.3% to £15.19. The deeper availability of catalogue and budget titles in the digital space keeps average prices well below those found at physical retail.

Despite increasing by the highest year-on-year margin (+7.4%) the market's lowest average selling prices for boxed games remain in the home delivery channel at £36.16, £0.87 per unit less than average prices found in the specialist channel, at £37.03.

The much smaller ranges carried in the supermarket channel focus mostly on frontline titles, pushing selling prices up to £37.57, the highest average in the category.

The much smaller ranges carried in the supermarket channel focus mostly on frontline titles, pushing selling prices up to £37.57, the highest average in the category.

PHYSICAL ENTERTAINMENT SOFTWARE AVERAGE SELLING PRICES

	2020	2021	2022	change 21/22
Specialists, generalists and independents	£35.03	£35.08	£37.03	5.5%
Supermarkets	£36.61	£36.11	£37.57	4.0%
Home delivery	£33.90	£33.68	£36.16	7.4%
Total Market	**£34.42**	**£34.17**	**£36.47**	**6.7%**

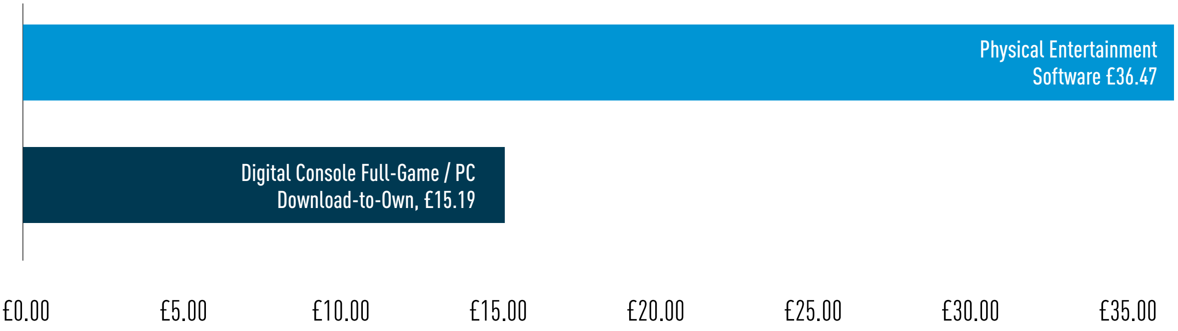
Source: GfK Entertainment. Physical SW. Note that Home Delivery (Online) includes all Home Delivery and Click & Collect transactions, if ordered and fully paid for online as the initial transaction.

DIGITAL FULL-GAME SOFTWARE AVERAGE SELLING PRICES

	2020	2021	2022	change 21/22
Digital Console Full-Game / PC Download-to-Own	£14.62	£14.15	£15.19	7.3%

Source: Omdia

AVERAGE SELLING PRICES BY GAMES FORMAT - 2022



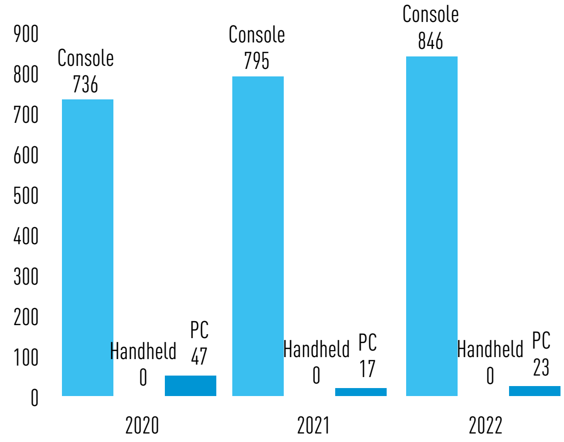
PRODUCT AVAILABILITY

846 new physical format console games titles were made available to the market in 2022, an increase of 6.4% versus 2021, the fifth consecutive year of growth.

With the current console cycle across all three major platforms maturing to somewhere near midway, hardware penetration is accelerating and games development for the new consoles increasing, with new IP gradually coming to market.

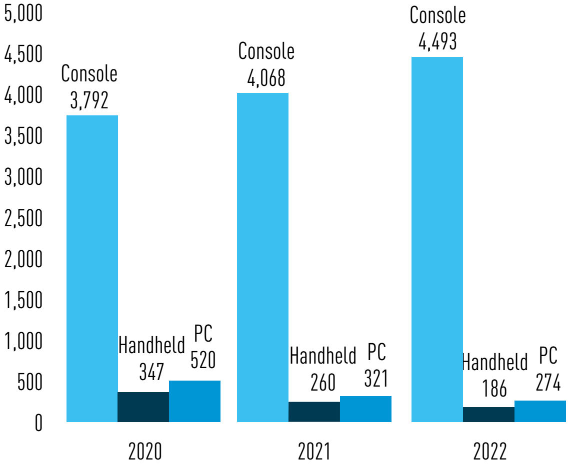
According to GfK Entertainment, the total number of physical games titles available in the UK is approaching the 5k mark, with a 10.4% increase in the console segment over the course of 2022. That was more than enough to offset the declines in across handheld and PC platforms.

TOTAL NO. OF NEW VIDEOGAMES TITLES AVAILABLE: 2020-2022



GfK Entertainment (physical formats only)

TOTAL NO. OF VIDEOGAMES TITLES AVAILABLE: 2020-2022



GfK Entertainment (physical formats only)

BRICKS AND MORTAR VS ONLINE

A defining dynamic of modern entertainment retailing over the last decade or so has been the shift of spend from traditional bricks and mortar shops to digital services and physical online operations.

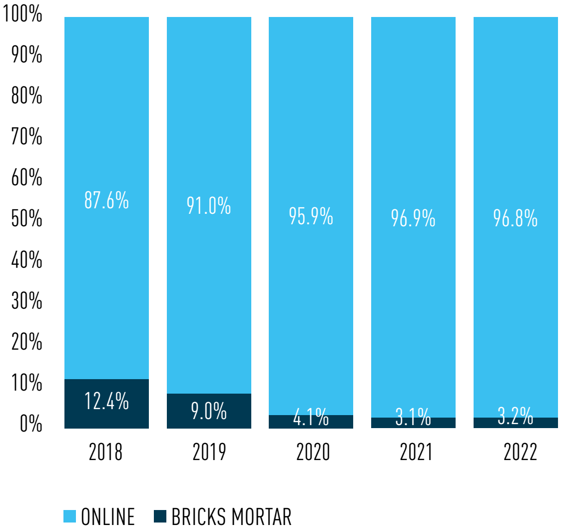
Across an extraordinarily diverse digital landscape, with countless opportunities to spend on downloadable content, microtransactions and subscriptions, the Games market has moved decisively online. This shift is clearly illustrated in the adjacent tables showing that, in 2022, over £4.5bn – or 97p in every pound spent - was transacted either over the internet at physical online retailers, or digitally for digital-only products.

While just £149.8m worth of transactions were taken over-the-counter last year, accounting for just 3.2% of total spend, this represents a small year-on-year increase as the UK's physical games retailers emerged from the lockdown restrictions of 2021 to enjoy a full year of uninterrupted trading on the high street.

BRICKS & MORTAR VERSUS ONLINE SALES SPLIT (£ MILLION - VIDEOGAMES)

	2018	2019	2020	2021	2022
Bricks & Mortar	443.3	328.4	190.1	143.2	149.8
Online	3,126.9	3,337.8	4,461.4	4,416.6	4,514.5
Total Market	**3,570.2**	**3,666.2**	**4,651.5**	**4,559.7**	**4,664.3**

VIDEOGAMES MARKET - SPEND SHIFT TO ONLINE (£ MILLION)



Source:
Physical Games: GfK Entertainment
Digital / Online / Mobile Games: Omdia
Note: Other Digital & Online includes Subscriptions, DLC, Micropayments, Casual MMOG, Social
Mobile / Tablet includes Downloads and IAP.

GAMES RETAILERS & DIGITAL SERVICES

For the fifth year in a row the number of UK retailers selling games software has fallen, according to figures produced by GfK Entertainment. In 2022, 3,436 outlets recorded sales of software over the course of the year compared to 4,017 in 2021, a fall of 14.5%.

A further 586 supermarket stores withdrew from the category in 2022, while 49 outlets in the general multiples sector ceased stocking titles.

With improving trading conditions on the high street, the number of specialist games shops recording sales of games software grew by 71 in 2022, up to 404, while music and video specialists also increased their presence in the category with a further 7 shops trading in games titles.

PRINCIPAL BRICKS & MORTAR RETAILERS SELLING GAMES

	2018	2019	2020	2021	2022	change 21/22
Music/Video Specialists	129	129	76	113	120	6.2%
Game & Software Specialists	397	292	298	333	404	21.3%
Electrical/Hardware Chains	403	329	332	314	300	-4.5%
General Multiples	1,400	1,388	1,245	929	880	-5.3%
Supermarkets*	3,804	3,326	2,500	2,178	1,592	-26.9%
Others (estimate)	202	180	160	150	140	-6.7%
Total Retailers	**6,335**	**5,644**	**4,611**	**4,017**	**3,436**	**-14.5%**

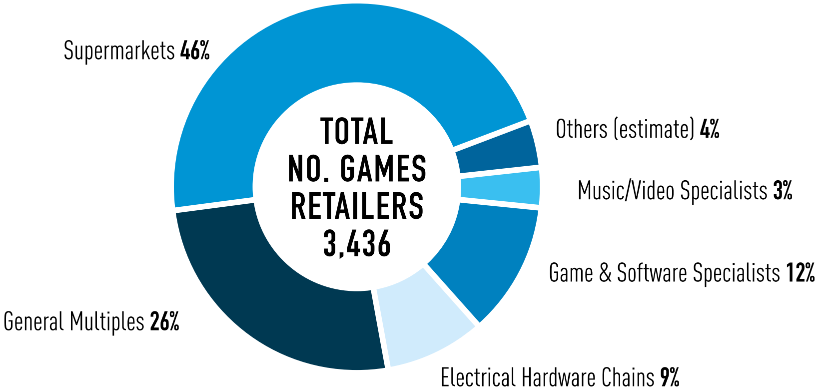
Supermarkets include Asda, Morrisons, Sainsbury's (including Locals*), Tesco (including Metro and Express*), Co-Ops* Spar* and One-Stop* (*That sell entertainment software titles).
Data is based on stores that sold only entertainment software (not hardware/accessories). Store count reflects actual outlet count based on active shops.
Click & Collect - items that are fully purchased online but picked up in-store - these are generally known as online transactions, but there are variances in the way some retailers account for these transactions.

In 2022 a further 3,236 shops - mostly supermarkets - sold card-based digital games content only, including Point-Of-Sale-Activation, Online Time and Virtual Currency

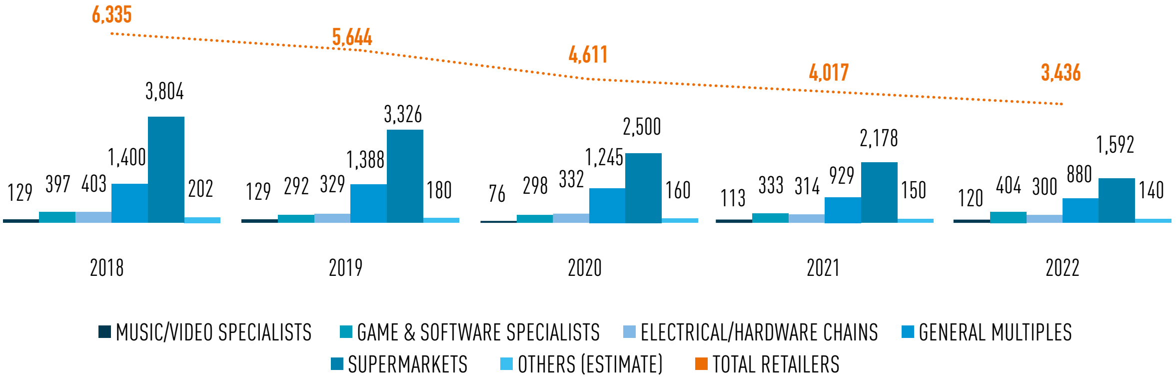
DIGITAL GAMES SERVICES: 2022

Buy / Rent	Subscription	Stream
Amazon Games	Google Play	Armor Games
Apple App Store	Humble Bundle	Bigpoint.com
Blizzard	King Games	Google Play
Codemasters	Nintendo Eshop	King Games
Dl Gamer	Origin	Miniclip.com
Ea Mobile	Playstation Network	Origin
Epic Games	Playstation Now	Playstation Network
Game	Sky	Playstation Now
Gameloft	Steam	Sky
Gamersgate	Uplay	Twitch
Games Planet	Twitch	Xbox Game Pass
Games Rocket	Xbox Game Pass	Xbox Live
Gog.com	Xbox Live	
Google Play		
Green Man Gaming		
Humble Bundle		
Just Flight		
Just Trains		
King Games		
Microsoft Apps		
Nintendo Eshop		
Origin		
Ovi Store		
Playstation Network		
Playstation Now		
Rockstar		
Sky		
Square Enix		
Steam		
Uplay		
Xbox Game Pass		
Xbox Live		
Xbox Live		

SHARE OF TOTAL GAMES RETAILER ESTATE: 2022



NO. OF BRICKS & MORTAR RETAILERS SELLING GAMES



GAMES RETAIL PHYSICAL

ERA's 'Physical Formats Share by Retailer Type' table looks at the traditional physical boxed games market and measures value shares by retail channel.

These tables illustrate the general decline of consumer spending on the boxed game running into the abrupt and highly disruptive impact of restrictions and closures brought about by the Covid pandemic.

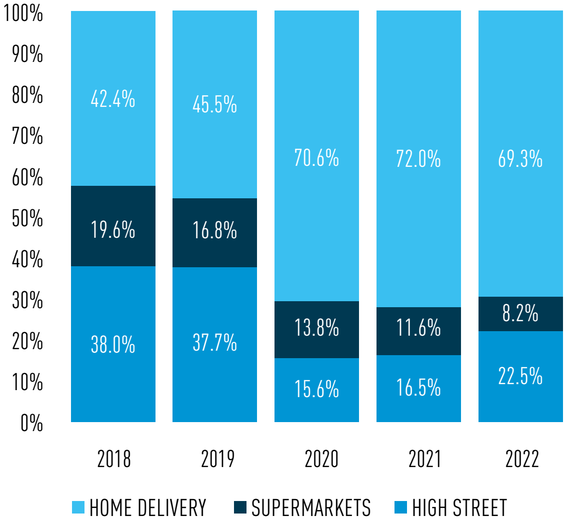
While 'home delivery' operators naturally benefitted from a closed high street – moving from 45.5% share of the market in 2019 to 72% in 2021 – it also shows the grocery channel reducing space committed to the games category, and high street specialists rapidly regaining the ground it lost thanks to the return to normal trading conditions in 2022.

Last year, retailers like Game helped the 'high street' channel grow its share from 16.5% to 22.5%, 'home delivery' share eroded to back below the 70% mark while 'supermarket' share dipped under 10% for the first time since it entered the UK's physical games category.

PHYSICAL FORMAT £ SPEND SHARE BY RETAILER TYPE - VIDEOGAMES

	2018	2019	2020	2021	2022
High Street	292.2	227.4	100.8	84.1	110.0
Supermarkets	151.2	101.0	89.3	59.1	39.9
Home Delivery	326.4	274.2	455.6	367.7	338.7
Total Market	**769.8**	**602.6**	**645.7**	**510.9**	**488.6**

VIDEOGAMES MARKET - PHYSICAL FORMAT SHARE BY RETAILER TYPE (£ MILLION)



Source: Physical Games: GfK Entertainment

CHARTS – COMBINED

ERA's Top 20 Combined Games Chart - that brings together physical sales as measured by GfK Entertainment and digital sales as provided by Sparkers / ISFE – sees two familiar franchises sitting in the top 2 positions.

Once again, 'FIFA' took the No.1 spot with the 'FIFA 23' edition with 2.5m unit sales, 61% of which came on digital formats, while 'Call of Duty: Modern Warfare II' finished at No.2 shifting nearly 1.7m units, 65% sold digitally.

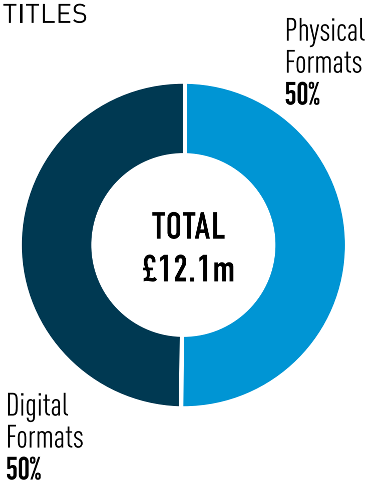
Bandai Namco's new IP - 'Elden Ring' - was the 2022's surprise hit, debuting at No.3 in the annual chart by shifting over 865k units, with over three-quarters coming via digital download.

TOP 20 COMBINED GAMES CHART - 2022

	Title	Company	Combined Unit Sales	Physical Units	Digital Units	% Shr Digital
1	FIFA 23	Electronic Arts	2,530,510	980,214	1,550,296	61.3%
2	Call Of Duty: Modern Warfare II	Activision Blizzard	1,675,323	581,786	1,093,537	65.3%
3	Elden Ring	Bandai Namco Entertainment	865,262	205,114	660,148	76.3%
4	Lego Star Wars: The Skywalker Saga	Warner Bros. Interactive	817,299	387,341	429,958	52.6%
5	Grand Theft Auto V	Take 2	816,081	142,939	673,142	82.5%
6	God Of War Ragnarok	Sony Computer Ent.	670,617	443,699	226,918	33.8%
7	FIFA 22	Electronic Arts	567,875	159,119	408,756	72.0%
8	Horizon Forbidden West	Sony Computer Ent.	530,454	409,747	120,707	22.8%
9	Mario Kart 8 Deluxe*	Nintendo	426,748	426,748	0	0.0%
10	Pokemon Legends: Arceus*	Nintendo	419,894	419,894	0	0.0%
11	Nintendo Switch Sports*	Nintendo	360,409	360,409	0	0.0%
12	Gran Turismo 7	Sony Computer Ent.	356,630	205,510	151,120	42.4%
13	Red Dead Redemption 2	Take 2	354,905	44,067	310,838	87.6%
14	Pokemon Violet	Nintendo	306,437	306,437	0	0.0%
15	F1 22	Electronic Arts	269,072	86,790	182,282	67.7%
16	WWE 2K22	Take 2	263,390	87,165	176,225	66.9%
17	Pokemon Scarlet*	Nintendo	239,971	239,971	0	0.0%
18	Minecraft*	Nintendo	219,679	219,679	0	0.0%
19	Animal Crossing: New Horizons*	Nintendo	210,276	210,276	0	0.0%
20	Assassin's Creed Valhalla	Ubisoft	176,311	47,681	128,630	73.0%

Source: Digital: Sparkers / ISFE
Physical: GfK Entertainment
* No Nintendo digital data available
PSN, XBL & 3rd party Nintendo, PC Steam sales only

PHYSICAL / DIGITAL SHARE OF 2022'S TOP 20 BESTSELLING TITLES



Source: Digital: Sparkers / ISFE
Physical: GfK Entertainment
Note: Splits only included where there is both physical and digital data available.

Warner Interactive has successfully merged two huge franchises – Lego and Star Wars – into one popular game, as 'Lego Star Wars: The Skywalker Saga' sold a combined 817k units, enough to take the No.4 slot in the chart.

Elsewhere in the 2022 games chart landscape, 'FIFA' and 'Call of Duty' dominate the top positions across the physical-only and digital-only charts. And while 'Elden Ring' enjoyed the overall No.3 spot, it took the top slot in the 'PC Download-to-Own Chart' with 182k units sold, according to Sparkers.

TOP 20 DIGITAL CONSOLE GAMES CHART 2022

	Title	Company	Total Digital Units Sold
1	FIFA 23	Electronic Arts	1,550,296
2	Call Of Duty: Modern Warfare II	Activision Blizzard	1,093,537
3	Grand Theft Auto V	Rockstar Games	572,786
4	Elden Ring	Bandai Namco Entertainment	478,614
5	FIFA 22	Electronic Arts	408,756
6	Lego Star Wars: The Skywalker Saga	Warner Bros. Interactive	360,776
7	God Of War Ragnarök	Sony Interactive Entertainment	226,918
8	Red Dead Redemption 2	Rockstar Games	209,747
9	F1 22	Electronic Arts	182,282
10	Grand Theft Auto Online	Rockstar Games	167,717
11	WWE 2K22	2K	167,562
12	Gran Turismo 7	Sony Interactive Entertainment	151,120
13	Star Wars Jedi: Fallen Order	Electronic Arts	126,276
14	NBA 2K23	2K	122,708
15	Horizon Forbidden West	Sony Interactive Entertainment	120,707
16	Assassin's Creed Valhalla	Ubisoft	114,188
17	Far Cry 6	Ubisoft	103,751
18	NBA 2K22	2K	96,199
19	Monopoly Plus	Ubisoft	92,369
20	Call Of Duty: Vanguard	Activision Blizzard	91,159

Source: Sparkers / ISFE
PSN, XBL & 3rd party Nintendo sales only

TOP 20 PC DOWNLOAD-TO-OWN CHART 2022

	Title	Company	Total PC DTO Units Sold
1	Elden Ring	Bandai Namco Ent	181,534
2	Red Dead Redemption 2	Rockstar Games	101,091
3	Grand Theft Auto V	Rockstar Games	100,356
4	Football Manager 2023	Sega	96,075
5	Total War: Warhammer III	Sega	75,090
6	Lego Star Wars: The Skywalker Saga	Warner Bros. Interactive	69,182
7	God Of War	Sony Interactive Ent	61,665
8	Sid Meier's Civilization VI	2K	50,795
9	Football Manager 2022	Sega	50,694
10	Dishonored	Bethesda Softworks	44,124
11	Tom Clancy's Rainbow Six Siege	Ubisoft	42,417
12	Cities: Skylines	Paradox Interactive	41,821
13	Spider-Man Remastered	Sony Interactive Ent	36,210
14	Fallout 4	Bethesda Softworks	35,181
15	Monster Hunter Rise	Capcom	34,961
16	Horizon Zero Dawn	Sony Interactive Ent	34,271
17	Fallout: New Vegas	Bethesda Softworks	29,931
18	Powerwash Simulator	Square Enix	27,557
19	The Elder Scrolls V: Skyrim: Special Edition	Bethesda Softworks	25,957
20	Days Gone	Sony Interactive Ent	24,770

Source: Sparkers / ISFE
PC Steam sales only

CHARTS – PHYSICAL

TOP 20 PHYSICAL GAMES CHART 2022

	Title	Company	Total Physical Units Sold
1	FIFA 23	Electronic Arts	980,214
2	Call Of Duty: Modern Warfare II	Activision Blizzard	581,786
3	God Of War Ragnarok	Sony Computer Ent.	443,699
4	Mario Kart 8 Deluxe	Nintendo	426,748
5	Pokemon Legends: Arceus	Nintendo	419,894
6	Horizon Forbidden West	Sony Computer Ent.	409,747
7	Lego Star Wars: The Skywalker Saga	Warner Bros. Interactive	387,341
8	Nintendo Switch Sports	Nintendo	360,409
9	Pokemon Violet	Nintendo	306,437
10	Pokemon Scarlet	Nintendo	239,971
11	Minecraft	Nintendo	219,679
12	Animal Crossing: New Horizons	Nintendo	210,276
13	Gran Turismo 7	Sony Computer Ent.	205,510
14	Elden Ring	Bandai Namco Entertainment	205,114
15	FIFA 22	Electronic Arts	159,119
16	Grand Theft Auto V	Take 2	142,939
17	Splatoon 3	Nintendo	142,517
18	Kirby And The Forgotten Land	Nintendo	131,507
19	Sonic Frontiers	Sega	128,359
20	Mario Party Superstars	Nintendo	111,083

Source: GSD

CHARTS – ACCESSORIES

TOP 20 GAMING ACCESSORY TRADITIONAL - 2022

Rev Posn	Unit Posn	Title	Format	Variant	Manufacturer	Unit Sales
1	1	Dualsense Wireless Controller For PS5 - White	Controller	PS5	Sony Computer Ent.	413,740
3	2	Dualsense Wireless Controller For PS5 - Midnight Black	Controller	PS5	Sony Computer Ent.	237,416
4	3	Xbox Wireless Controller - Carbon Black	Controller	Xbox Series	Microsoft	211,169
25	4	Ear Force Recon 50x Headset Black	Voice Access Headset	Xbox One/ Series	Turtle Beach	161,764
9	5	Xbox Wireless Controller - Shock Blue	Controller	Xbox Series	Microsoft	160,220
6	6	PS4 Dualshock 4 Controller V2 (Black)	Controller	PS4	Sony Computer Ent.	159,916
8	7	Xbox Wireless Controller - Robot White	Controller	Xbox Series	Microsoft	156,368
19	8	Wired Controller For Xbox - Black	Controller	Xbox Series	Acco	150,999
13	9	PS4 Dualshock 4 Controller V2 Mid Blue	Controller	PS4	Sony Computer Ent.	125,819
14	10	Xbox Wireless Controller - Pulse Red	Controller	Xbox Series	Microsoft	123,153
10	11	Dualsense Wireless Controller For PS5 - Cosmic Red	Controller	PS5	Sony Computer Ent.	120,035
42	12	Ear Force Recon 50p Headset Black	Voice Access Headset	PS4/PS5	Turtle Beach	115,854
11	13	Dualsense Wireless Controller For PS5 - Starlight Blue	Controller	PS5	Sony Computer Ent.	115,395
28	14	Dualsense Charging Station For PS5	Battery Pack/ Dock	PS5	Sony Computer Ent.	112,396
2	15	Xbox One Elite Wireless Controller Series 2 - Black	Controller	Xbox One	Microsoft	99,115
7	16	Pulse 3d Wireless Headset For PS4/ PS5 - White	Voice Access Headset	PS4/PS5	Sony Computer Ent.	95,618
37	17	Wired Controller For Xbox - White	Controller	Xbox Series	Acco	85,108
62	18	Xbox Series Twin Docking Station - Black	Battery Pack/ Dock	Xbox Series	Venom Products	76,741
21	19	PS4 Dualshock 4 Controller V2 (Red)	Controller	PS4	Sony Computer Ent.	75,243
16	20	Joy-Con Pair (Neon Purple/Neon Orange)	Controller	Nintendo Switch	Nintendo	72,711

GfK Entertainment. Total UK Market Estimates

GAMES VISIBILITY & AWARENESS:

ON-STORE DISCOVERABILITY & PRESS/SOCIAL ACTIVITY

Lego Star Wars: The Skywalker Saga was the most discoverable title across the whole of 2022 on online retailers (physical games only, console and PC). 'Discoverability' refers to the number of, and quality of, on-store placements of a specific title on online or console stores. It indicates how commercially visible a title is to consumers and can help identify why a title may under/overperform.

The most discoverable titles of 2022 span a range of age of titles; from Assassins Creed: Valhalla, which remained highly discoverable despite being launched in November 2020, to pre-sale placements for Hogwarts Legacy, released in February 2023, highlighting the high retailer anticipation for such high-profile titles.

Fortnite continues to be the most talked about game in the UK, highlighted by the number of press articles and social media posts and views. The evergreen nature of its success is in contrast to the success of the brand new franchise, Elden Ring, which is just edged out to number 2 position for press and social activity. This social/press chatter, strong discoverability (taking 3rd position for the year) and sales success, along with the numerous awards the title has won, prove what a huge breakthrough phenomenon Elden Ring is with gamers.

The profile of the long-standing franchises Call of Duty and FIFA remain strong, both with two titles each in the top 10 for press/social activity, whilst the most recent two instalments of FIFA make the top 10 for discoverability.

TOP 10 GAMES BY ON-STORE DISCOVERABILITY – UK - 2022		
RANK	TITLE	PUBLISHER
1	Lego Star Wars: The Skywalker Saga	Warner Bros.
2	Hogwarts Legacy	Warner Bros.
3	Elden Ring	Bandai Namco
4	Far Cry 6	Ubisoft
5	Fifa 22	Electronic Arts
6	Fifa 23	Electronic Arts
7	Rainbow Six: Extraction	Ubisoft
8	Gotham Knights	Warner Bros.
9	Call Of Duty: Vanguard	Activision Blizzard
10	Assassins Creed: Valhalla	Ubisoft

Source: Fancensus. Online stores - physical games. Includes all SKUs across console & PC titles.

TOP 10 GAMES BY PRESS/SOCIAL ACTIVITY – UK - 2022		
RANK	TITLE	PUBLISHER
1	Fortnite	Epic Games
2	Elden Ring	Bandai Namco
3	Call Of Duty: Modern Warfare 2 (2022)	Activision Blizzard
4	Grand Theft Auto V: Next Gen	Rockstar Games
5	FIFA 23	Electronic Arts
6	Call Of Duty: Warzone	Activision Blizzard
7	God Of War: Ragnarok	Sony Interactive Entertainment
8	FIFA 22	Electronic Arts
9	Minecraft	Microsoft
10	Apex Legends	Electronic Arts

Source: Fancensus. Blended ranking of press mentions, YouTube views, Tweets, Facebook posts and Instagram posts. Console & PC Games.

VIDEO

RETAIL SALES OF UK VIDEO

VALUE **£4,432bn**

YOY CHANGE **14.4%** ↑

DIGITAL VIDEO SALES

VALUE **£4,213m**

YOY CHANGE **16.2%** ↑

RETAIL SALES OF DISCS

VALUE **£209m**

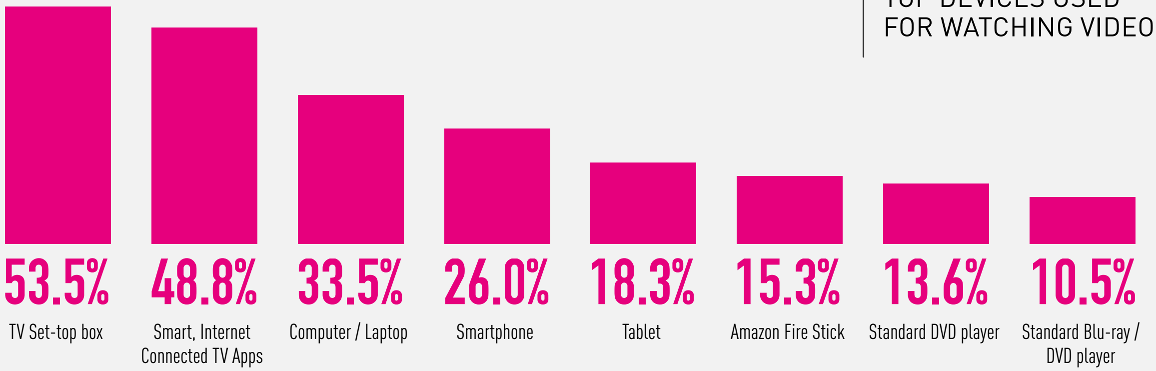
YOY CHANGE **11.5%** ↓

TOP GUN MAVERICK TOPPED THE CHARTS WITH SALES OF **1.1** MILLION UNITS

MEET THE VIDEO CONSUMER

The TV Set-Top Box is the most used device to watch video content

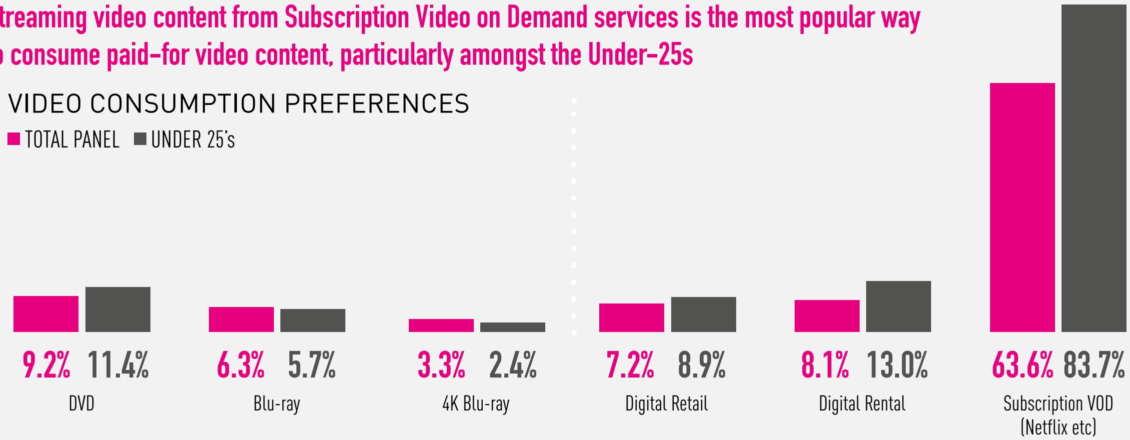
TOP DEVICES USED FOR WATCHING VIDEO



ERA Entertainment Tracker November 2022

Streaming video content from Subscription Video on Demand services is the most popular way to consume paid-for video content, particularly amongst the Under-25s

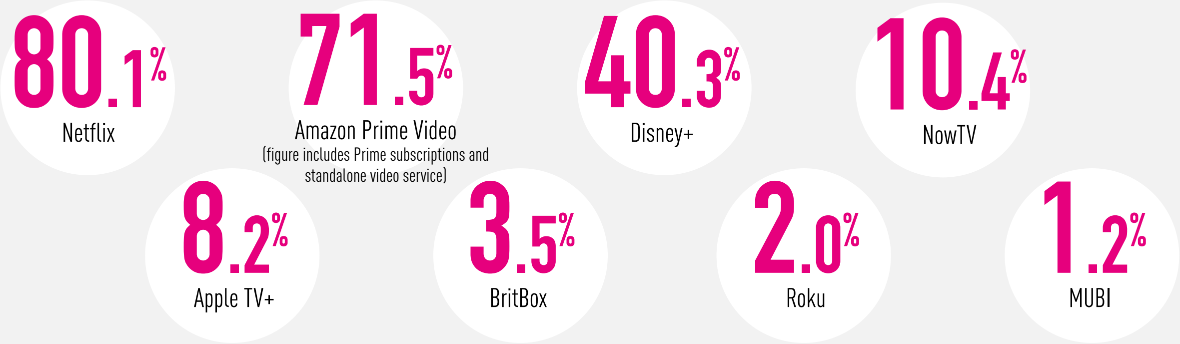
VIDEO CONSUMPTION PREFERENCES



ERA Entertainment Tracker November 2022

As a destination for streamed video, Netflix is the most popular closely followed by Amazon

WHERE SVOD USERS STREAMED VIDEO



ERA Quarterly Tracking Study (November 2022)
(conducted by FlyResearch)

VIDEO OVERVIEW

A record £4.4bn was spent on buying video products and accessing video content in the UK last year, up 14.4% versus 2021, the 8th consecutive of year growth posted by the category.

After two years of disruption, production in the film and TV industries began ramping up, cinemas stayed open for a full 12 months and trading conditions on the high street normalised.

Compelling content started to land more regularly on the Subscription Video on Demand platforms, the occasional blockbuster hit the big screens and the new releases started to refill video distributor schedules.

Since 2018, the burgeoning SVoD market has driven the majority of revenues generated in the video category and 2022 saw the sector climb to new heights, adding an incremental £575m in annual spend. According to figures produced by FutureSource Consulting, spend on subscriptions to services like Netflix, Amazon Video and Disney+ surged to £3.8bn in 2022, up 17.6% versus 2021.

After shrinking by over a third in value terms in 2021, the annual rate of decline in retail sales of DVDs, Blu-rays and other physical formats slowed dramatically in 2022, with £209m spent, down 11.5% year-on-year. The £231.3m spent in the UK's digital retail, or EST, market saw the segment return to annual growth, up 1.1% versus 2021.

The transactional digital video rental market also rebounded after a difficult 2021, with spend on VoD rising to £132.2m, up 6.1%, while physical rental revenues dipped again, down by 19% to £9.9m.

VIDEO - VALUE (£MILLION)

	2020	2021	2022	change 21/22
DVD	248.9	150.5	117.2	-22.1%
Blu-Ray	106.7	85.7	91.7	7.0%
4K UHD	24.8	23.6	31.5	33.9%
Other Physical	0.0	0.0	0.0	-32.7%
Total Physical Retail	**355.7**	**236.2**	**209.0**	**-11.5%**
Physical Rental	15.2	12.3	9.9	-19.4%
Total Physical Video	**370.9**	**248.5**	**218.9**	**-11.9%**
Digital Retail (EST)	310.8	228.7	231.3	1.1%
Digital Rental (VOD)	157.4	124.6	132.2	6.1%
SVoD	2,503.1	3,273.9	3,849.8	17.6%
Total Digital Video	**2,971.4**	**3,627.2**	**4,213.2**	**16.2%**
Total Video	**3,342.2**	**3,875.7**	**4,432.2**	**14.4%**

VIDEO - VOLUME (MILLION)

	2020	2021	2022	change 21/22
DVD	27.4	16.0	11.8	-26.2%
Blu-Ray	6.7	5.1	5.4	5.2%
4K UHD	1.1	1.0	1.3	32.9%
Other Physical	0.0	0.0	0.0	-31.9%
Total Physical Retail	**34.1**	**21.1**	**17.2**	**-18.6%**
Physical Rental	4.3	3.2	2.3	-27.9%
Total Physical Video	**38.3**	**24.3**	**19.5**	**-19.8%**
Digital Retail (EST)	35.5	27.3	25.8	-5.5%
Digital Rental (VOD)	40.6	34.6	33.6	-2.9%
Total Digital Video (exc. SVoD)	**76.1**	**61.9**	**59.4**	**-4.0%**
Total Video	**114.4**	**86.2**	**78.9**	**-8.5%**

Sources: DVD, Blu-ray, Other Physical: The Official Charts / BASE. 4K UHD counted in Blu-ray.
Physical Rental: Omdia
EST / VOD Volume: Futuresource Consulting
Digital Video Value (EST, SVoD, iVoD, Pay TV VoD) PVoD Excluded - Futuresource Consulting

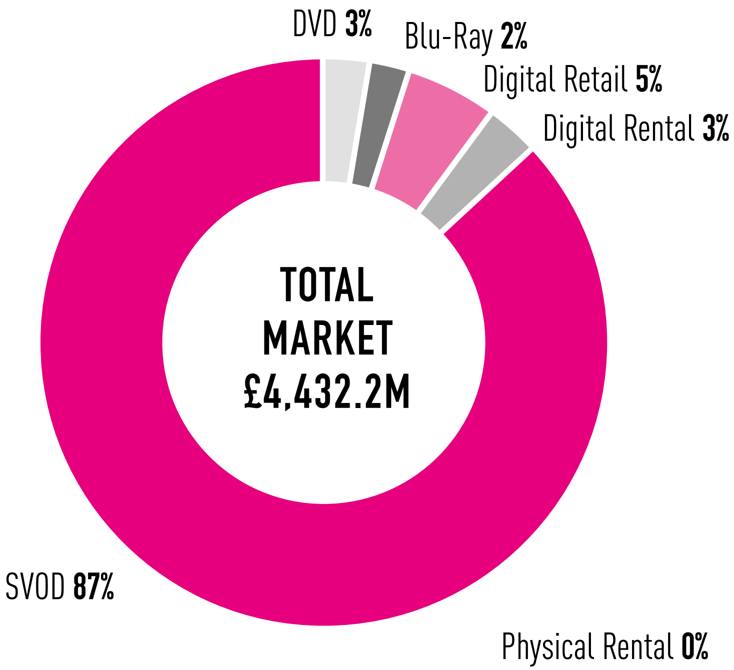
VIDEO MARKET SALES BY SEGMENT

The size of the SVoD market has just about tripled since 2018 with spend growing at a particularly rapid rate over the last three years. Worth £1,325.4m and a 56% share of the market in 2018, spend on subscriptions hit £3.8bn in 2022, amounting to an 87% share of the market.

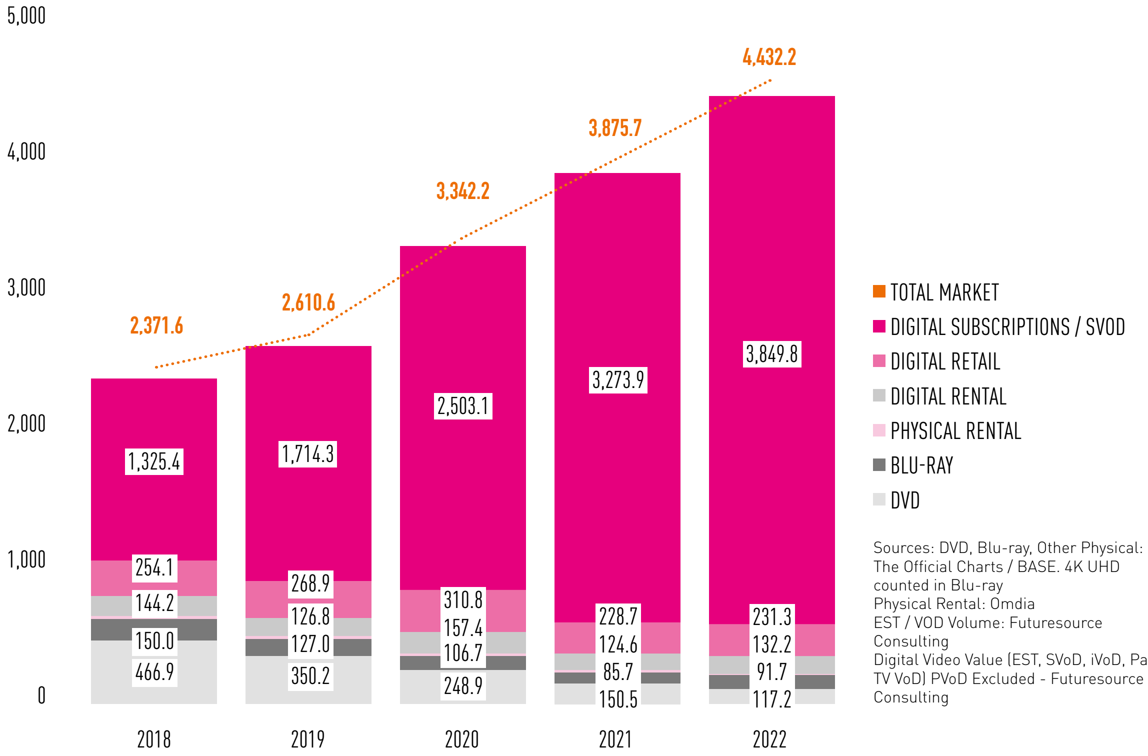
Over the same period spend on DVDs has fallen from £466.9m to just £117.2m, shedding more than 75% of its value in 5 years. DVD share of the market now sits at just 3%. While Blu-ray performance has followed a similar 5-year trajectory, 2022 saw the format post an annual bump in spend to £91.1m, securing 2% of the total video market.

Improving EST / Digital Retail sales were worth £231.3m in 2022, or 5% of total market spend, while the VOD market also suffered some share erosion, down from 3.2% to 3.0% despite posting a marginal bump in revenues.

SHARE OF VIDEO MARKET
BY FORMAT: 2022



VIDEO MARKET BY SEGMENT £m



Sources: DVD, Blu-ray, Other Physical: The Official Charts / BASE. 4K UHD counted in Blu-ray
Physical Rental: Omdia
EST / VOD Volume: Futuresource Consulting
Digital Video Value (EST, SVoD, iVoD, Pay TV VoD) PVoD Excluded - Futuresource Consulting

THE DIGITAL VIDEO MARKET

According to FutureSource Consulting, there were nearly 49 million subscriptions to video streaming services operating in the UK during 2022, up 6.4% versus 2021, over double the number of subscriptions in 2018.

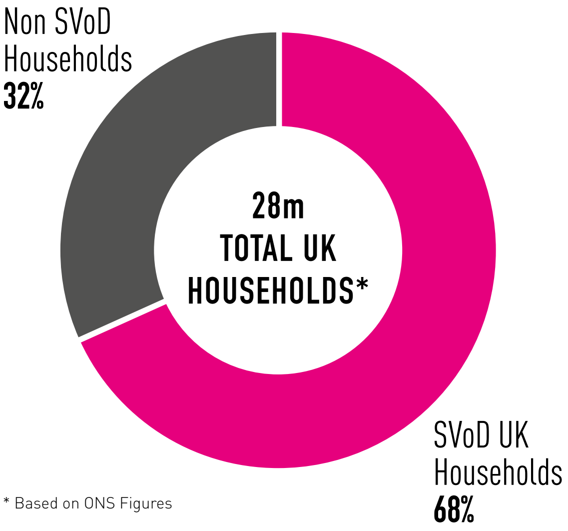
19.1 million households are now actively subscribing to at least one service, converting to a penetration level of 68% of total UK homes. On average, that is 2.5 active subscriptions per household. In 2018, the average was just 1.6, the growth illustrative of increasing de-aggregation of content, content-owners launching their own new services and the UK consumer's willingness to stack subscriptions.

SUBSCRIPTION VIDEO ON DEMAND (SVOD) - SUBSCRIPTIONS / HOUSEHOLDS (MILLION)

	2020	2021	2022	change 21/22
SVoD Subscriptions	40.6	45.8	48.8	6.4%
SVoD Households	17.5	18.3	19.1	4.3%

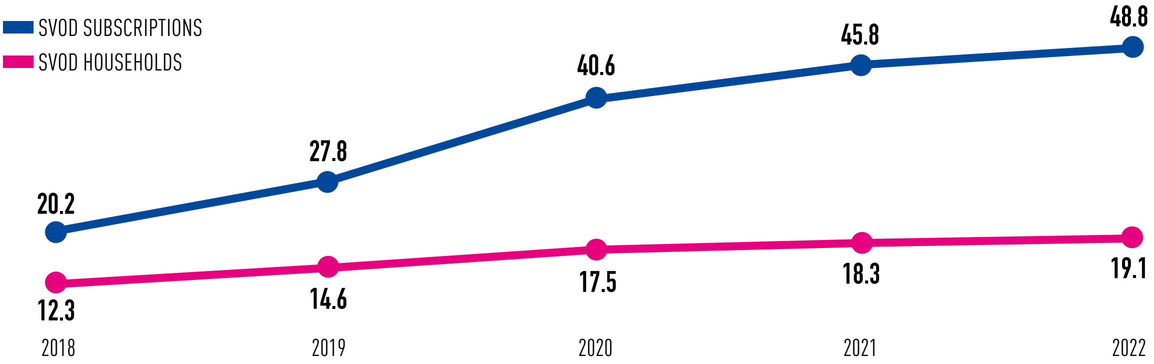
Sources: EST / VOD / SVoD Volume: Futuresource Consulting
Digital Video Value (EST, SVoD, iVoD, Pay TV VoD) PVoD Excluded - Futuresource Consulting

UK HOUSEHOLD SVOD PENETRATION 2022



* Based on ONS Figures

SVOD SUBSCRIPTIONS AND HOUSEHOLDS (MILLION)



Coupled with price increases implemented across the major services, including Netflix and Disney+, the SVoD market value rose to record levels: in 2022 over £3.8bn was spent, up 17.6% versus 2021 and 190% versus 2018.

In terms of digital retail, or EST, the market stabilised somewhat last year after a 2021 that saw annual value declines for the first time ever. While total volumes dipped for the second year in a row, the increased availability of frontline releases inflated average selling prices, driving revenues marginally north. New release download revenues represented 47% of the total in 2022, up from 38% in 2021, helping spend grow by 1.1% to £231.3m.

The digital rental VOD market also relies heavily on a strong new release slate and the segment's performance in 2022 closely mirrored that of EST. Volumes were also down for a second consecutive year but spend climbed to £132.2m, up 6.1% year-on-year.

Overall, the UK digital video market was worth over £4.2bn in 2022, 16.2% up versus 2021.

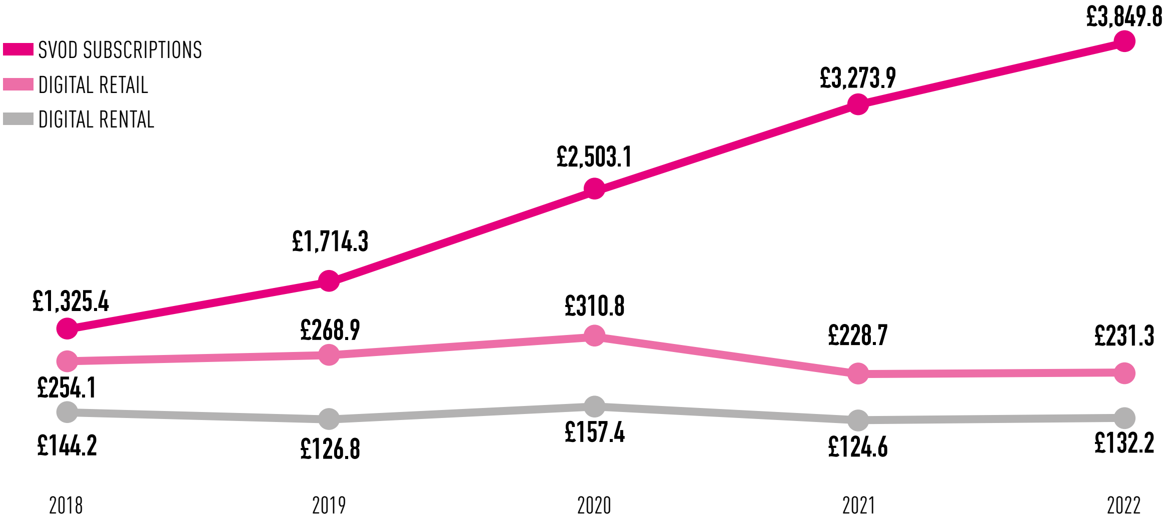
DIGITAL VIDEO - VALUE (£MILLION)

	2020	2021	2022	change 21/22
Digital Retail (EST)	310.8	228.7	231.3	1.1%
Digital Rental (VOD)	157.4	124.6	132.2	6.1%
SVoD	2,503.1	3,273.9	3,849.8	17.6%
Total Digital Video	**2,971.4**	**3,627.2**	**4,213.2**	**16.2%**

DIGITAL VIDEO - VOLUME (MILLION)

	2020	2021	2022	change 20/22
Digital Retail (EST)	35.5	27.3	25.8	-5.5%
Digital Rental (VOD)	40.6	34.6	33.6	-2.9%
Total Digital Video (exc. SVoD)	**76.1**	**61.9**	**59.4**	**-4.0%**

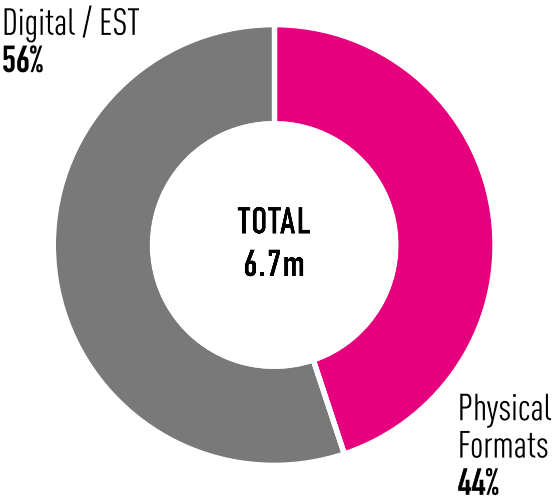
DIGITAL VIDEO VALUE BY SEGMENT (£ MILLION)



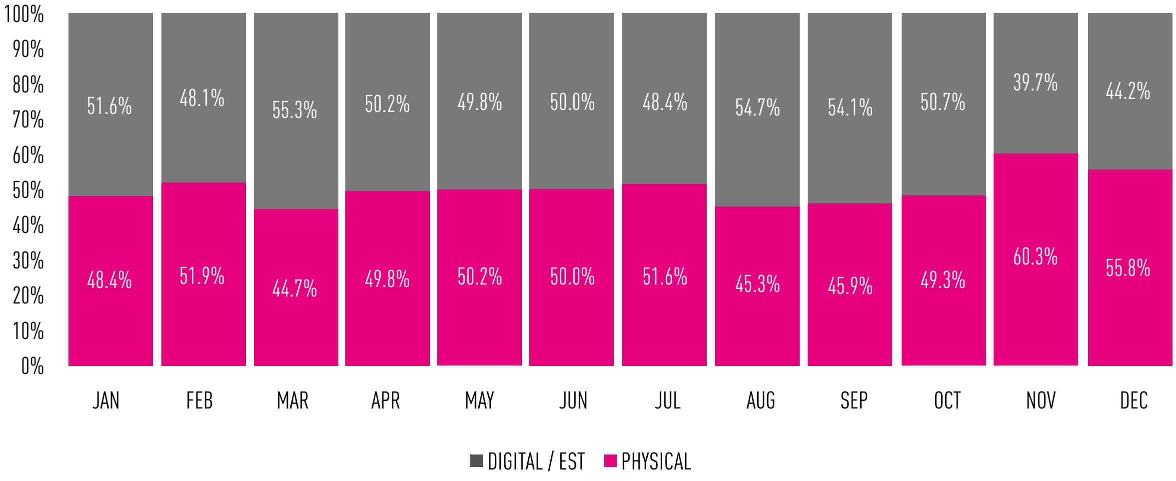
EST VS PHYSICAL

At the end of this section you will find digital and physical charts where you will see that the digital share on single titles varies from just 25% to north of 73%. On average the digital share of the top 20 titles was 44%.

PHYSICAL / EST SHARE OF 2022'S TOP 20 BESTSELLING SELL-THROUGH TITLES



PHYSICAL / EST SHARE OF TOP 20 SELL-THROUGH TITLES BY MONTH



THE PHYSICAL VIDEO MARKET

While the UK's overall video market has returned consistent year-on-year growth for 8 years, the physical retail segment has been in decline since 2009, as the consumer switches spend to digital transactional format options and shifts to streaming subscriptions in record numbers.

Two years of lockdown-affected trading and restricted new release activity through 2020 and 2021 steepened those declines. According to figures from the Official Charts Company, in 2021 the value of the once all-conquering DVD market fell almost 40% year-on-year to £150.5m. In 2022, as the new release slate recovered, the rate of those annual declines slowed. 11.8m DVDs were sold in the UK last year, generating £117.2m at retail, down 22% year-on-year. The market is now around a quarter of the size it was in 2018.

The Blu-ray format is prone to the same structural market pressures as DVD but benefits from a physical format consumer that increasingly demands its viewing experience in High Definition. After posting near 20% annual declines in 2021, better new release availability and a consumer switching away from DVD combined to boost sales in 2022, with volumes up 5.2% and value up 7% to £91.7m.

Further evidence of the film connoisseur demanding even more hi-def attributes from their disc purchases can be found in the performance of the buoyant 4K UHD Blu-ray variant. Measured within the overall Blu-ray numbers, when broken out on their own, volumes are up 33% to 1.3m units. Commanding a premium price, those units were worth £31.5m though the tills, up 34% on 2021.

Overall, the physical video market was worth £218.9m in 2022, down 11.9% versus 2021.

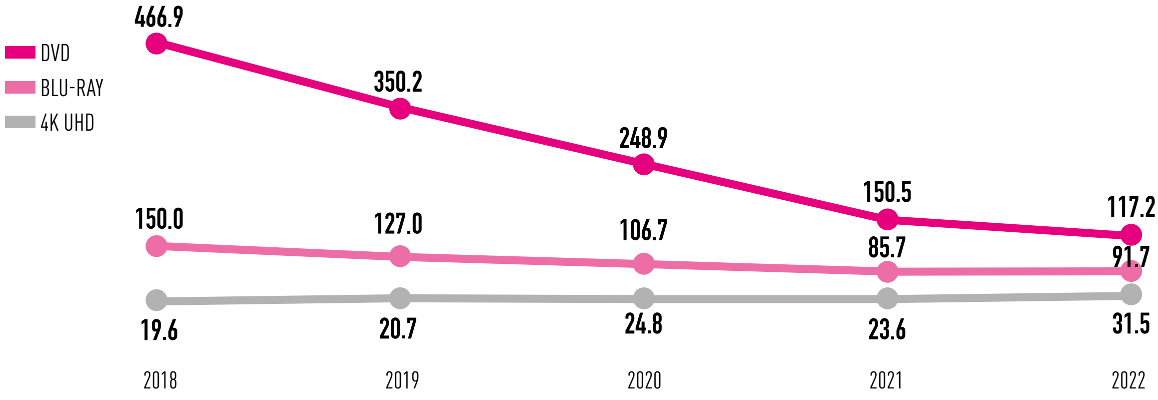
VIDEO - VALUE (£MILLION)

	2020	2021	2022	change 21/22
DVD	248.9	150.5	117.2	-22.1%
Blu-Ray	106.7	85.7	91.7	7.0%
4K UHD	24.8	23.6	31.5	33.9%
Total Physical Retail	**355.7**	**236.2**	**209.0**	**-11.5%**
Physical Rental	15.2	12.3	9.9	-19.4%
Total Physical Video	**370.9**	**248.5**	**218.9**	**-11.9%**

VIDEO - VOLUME (MILLION)

	2020	2021	2022	change 21/22
DVD	27.4	16.0	11.8	-26.2%
Blu-Ray	6.7	5.1	5.4	5.2%
4K UHD	1.1	1.0	1.3	32.9%
Total Physical Retail	**34.1**	**21.1**	**17.2**	**-18.6%**
Physical Rental	4.3	3.2	2.3	-27.9%
Total Physical Video	**38.3**	**24.3**	**19.5**	**-19.8%**

PHYSICAL VIDEO VALUE BY SEGMENT (£ MILLION)



NEW RELEASE VS CATALOGUE

As the video category continues to re-build its content offer and reinvigorate the product mix, new release titles increased their share of overall spend, from 27.6% in 2021 to 33.6% in 2022.

PHYSICAL FORMATS: NEW RELEASE VERSUS CATALOGUE - VALUE (£M)

	2020	2021	2022	change 21/22
New Release	110.4	65.2	70.2	7.7%
Catalogue	245.3	171.0	138.8	-18.8%
Total Physical	**355.7**	**236.2**	**209.0**	**-11.5%**
New Release as % of market	31.0%	27.6%	33.6%	

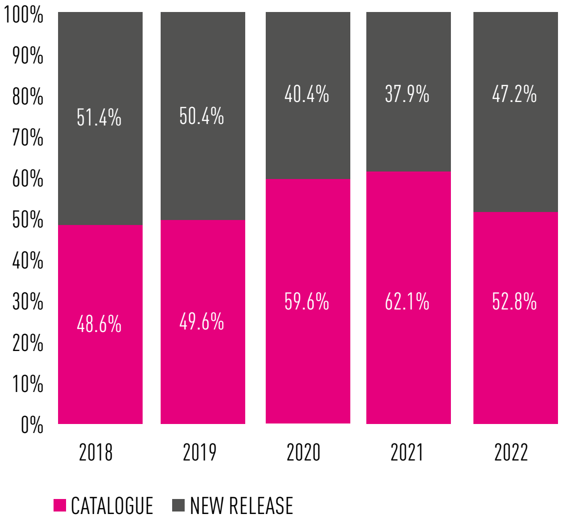
Source: Official Charts/BASE - Retail Only

PHYSICAL FORMATS: NEW RELEASE VERSUS CATALOGUE - UNITS (M)

	2020	2021	2022	change 21/22
New Release	9.2	5.3	5.0	-4.2%
Catalogue	24.8	15.9	12.2	-23.3%
Total Physical	**34.1**	**21.1**	**17.2**	**-18.6%**
New Release as % of market	27.0%	24.9%	29.2%	

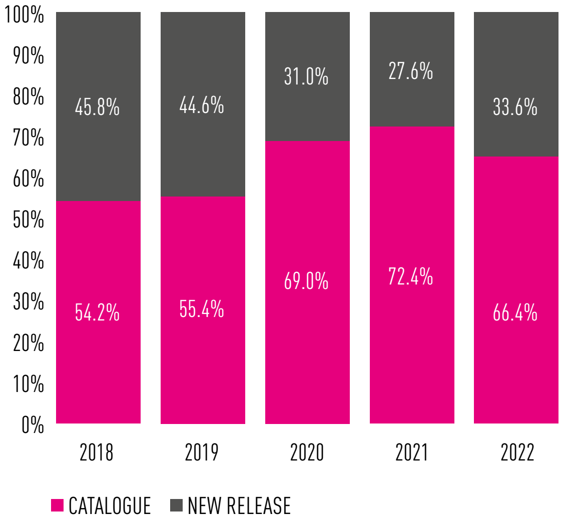
Source: Official Charts/BASE - Retail Only

DIGITAL EST NEW RELEASE VS CATALOGUE UNITS (FILM ONLY)



Source: EST Volume, Film Only - Official Charts Company

PHYSICAL VIDEO NEW RELEASE VS CATALOGUE £



Source: Official Charts Company / BASE - Retail Only

VIDEO MARKET PRODUCT AVAILABILITY

While more compelling, bankable video content was released to the market in 2022 compared to the previous two years, the total number of new titles available fell yet again, highlighting just how far the studios have to go to fully recover the production ground lost through the pandemic.

1,219 new titles were made available on DVD, down 18.5% versus 2021 and 1,201 new titles arrived on Blu-ray, down 8.8%. The 350 new titles made available on 4k UHD is, however, up marginally on 2021 levels, by 1.4%.

The lack of genuine new release activity in 2021 saw a huge increase in the number of titles previously unavailable on digital formats to be rushed out for the EST and transactional VOD markets. An unprecedented 8,144 titles were released to digital in 2021, over 6,400 more than in 2020. That level of activity naturally fell back in 2022 with just 1,099 new titles being made available, down 86.5% year-on-year.

The total number of EST titles available now stands at 20,431, closing in on the total number available on Blu-ray which grew to 21,854 in 2022.

DVD still dominates in terms of number of titles with 127,344 available to buy, while the category's newest physical format – 4K UHD – still lags far behind the others with only 1,639 available in total.

NO. OF NEW VIDEO TITLES AVAILABLE ON FORMAT

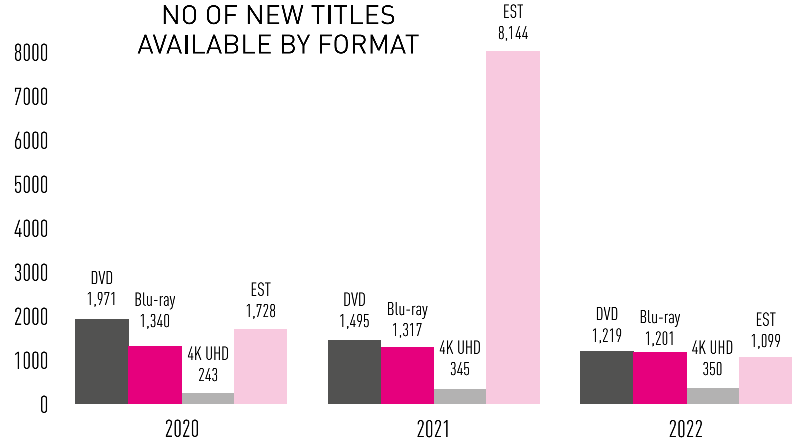
	2018	2019	2020	2021	2022	change 21/22
DVD	2,901	2,070	1,971	1,495	1,219	-18.5%
Blu-ray	1,583	1,498	1,340	1,317	1,201	-8.8%
4K UHD	204	247	243	345	350	1.4%
EST	2,047	1,463	1,728	8,144	1,099	-86.5%

Source: Kantar

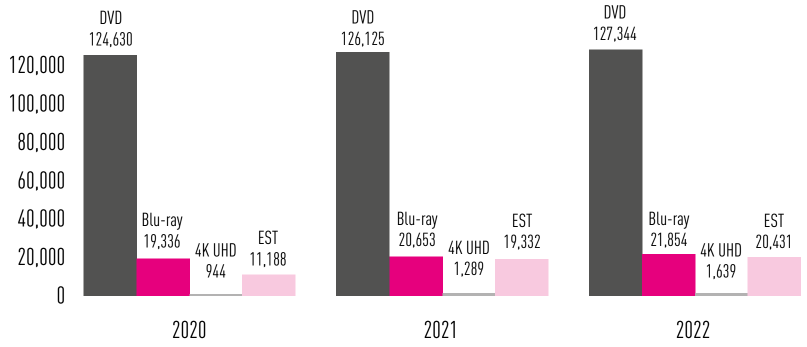
TOTAL NO. OF VIDEO TITLES AVAILABLE

	2018	2019	2020	2021	2022	change 21/22
DVD	120,589	122,659	124,630	126,125	127,344	1.0%
Blu-ray	16,498	17,996	19,336	20,653	21,854	5.8%
4K UHD	454	701	944	1,289	1,639	27.2%
EST	7,997	9,460	11,188	19,332	20,431	5.7%

Source: Kantar


NO OF NEW TITLES AVAILABLE BY FORMAT

TOTAL NO. OF VIDEO TITLES AVAILABLE



VIDEO AVERAGE SELLING PRICES

Average selling prices in the UK's physical and digital video market rose across the board in 2022. The average DVD unit cost £7.74 in 2022, up 8.4% versus 2021. The supermarket channel commanded the highest ASP at £7.94, a rise of 14.6% year-on-year, illustrative of the channel focusing more on smaller, chart focused ranges.

Blu-ray ASPs (excl. 4K) climbed to £12.05 in 2022, up 4.2% versus the previous year. At £13.63 the highest average Blu-ray prices were once again found in the supermarkets but, as increasingly seen in their DVD offers, Blu-ray range is mostly focused on premium new release titles.

The category's highest definition physical format, 4K UHD, commanded a selling price that was, on average, more than double the cost of standard Blu-rays prices. At £24.30, 4K prices are up 0.8% versus 2021, with the Home Delivery channel generating the highest ASP at £25.56, nearly £3 higher than found elsewhere.

DVD AVERAGE SELLING PRICES

	2020	2021	2022	change 21/22
Specialists, generalists and independents	£7.16	£7.82	£7.87	0.6%
Supermarkets	£7.29	£6.93	£7.94	14.6%
Home delivery	£7.40	£7.13	£7.59	6.5%
Total Market	**£7.32**	**£7.14**	**£7.74**	**8.4%**

Source: Offical Charts / Kantar. Excludes box sets and multiple disc-sets of 3 or more. Physical product only

BLU-RAY (EXCLUDING 4K VARIANTS) AVERAGE SELLING PRICES

	2020	2021	2022	change 21/22
Specialists, generalists and independents	£10.05	£11.01	£11.41	3.6%
Supermarkets	£13.45	£12.83	£13.63	6.2%
Home delivery	£11.52	£11.49	£12.11	5.4%
Total Market	**£11.62**	**£11.57**	**£12.05**	**4.2%**

Source: Offical Charts / Kantar. Excludes box sets and multiple disc-sets of 3 or more. Physical product only

BLU-RAY (INCLUDING 4K VARIANTS) AVERAGE SELLING PRICES

	2020	2021	2022	change 21/22
Specialists, generalists and independents	£11.13	£12.47	£12.81	2.7%
Supermarkets	£14.45	£13.23	£14.04	6.1%
Home delivery	£14.15	£14.99	£16.53	10.3%
Total Market	**£13.40**	**£14.34**	**£15.37**	**7.2%**

Source: Offical Charts / Kantar. Excludes box sets and multiple disc-sets of 3 or more. Physical product only

4K UHD AVERAGE SELLING PRICES

	2020	2021	2022	change 21/22
Specialists, generalists and independents	£18.58	£18.76	£18.84	0.4%
Supermarkets	£23.82	£23.52	£22.79	-3.1%
Home delivery	£23.49	£25.17	£25.56	1.6%
Total Market	**£22.96**	**£24.11**	**£24.30**	**0.8%**

Source: Official Charts / Kantar

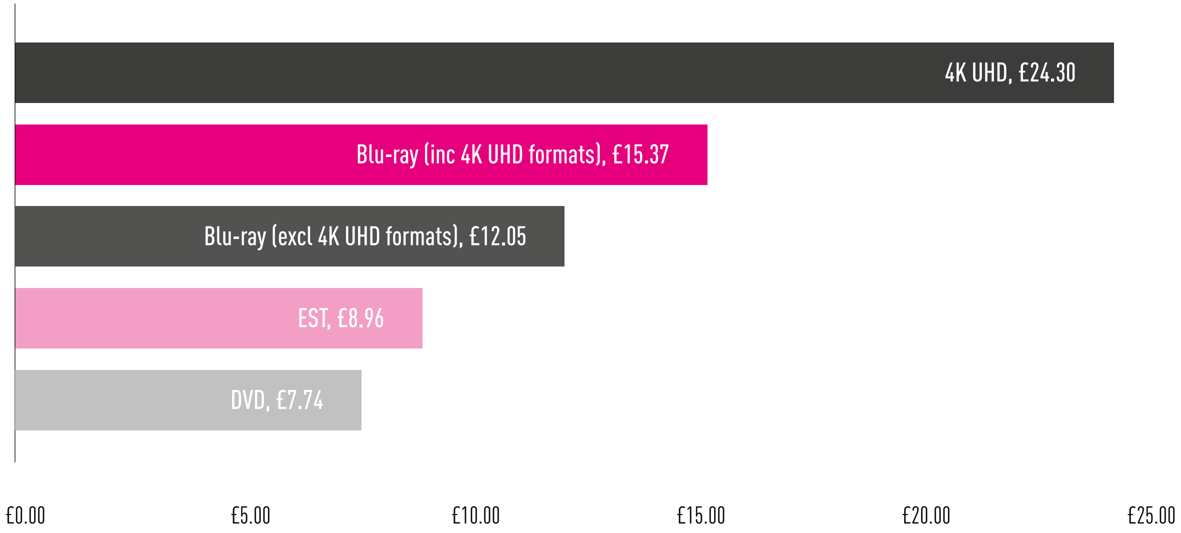
The average price of an EST download climbed to £8.96, up 7% versus 2021.

ELECTRONIC SELL-THROUGH (EST) AVERAGE SELLING PRICES

	2020	2021	2022	change 21/22
Total EST	**£8.75**	**£8.38**	**£8.96**	**7.0%**

Source: Futuresource

AVERAGE SELLING PRICES BY VIDEO FORMAT - 2022



BRICKS AND MORTAR VERSUS ONLINE

Exposed to the twin impact of pandemic-driven trading restrictions on the high street and a quickening contraction in the number of supermarkets stocking physical video products in the UK, the value of DVDs and Blu-rays sold by bricks and mortar retailers amounted to just £76.2m in 2022, down from £85.1m in 2021.

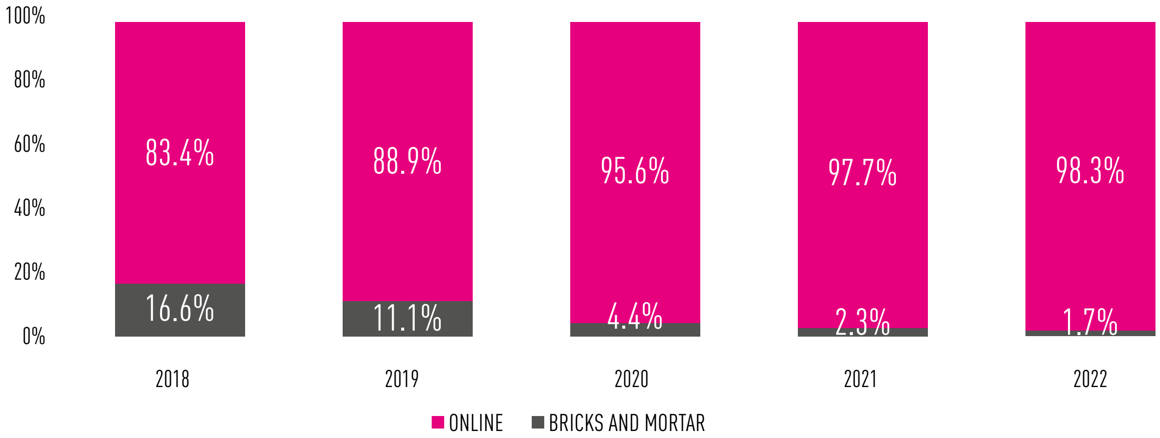
When combining the value of the UK's enormous Subscription Video on Demand sector, with revenues delivered by transactional digital video services and spend on physical video products retailed over the internet by home delivery operators, the share of overall category spend shifted even further online in 2022.

A total £4.4bn was spent on accessing digital video content and making online purchases last year, accounting for a record 98.3% of overall category revenues.

BRICKS & MORTAR VERSUS ONLINE SALES SPLIT (£ MILLION)

Retail Type	2018	2019	2020	2021	2022
Bricks & Mortar	394.7	290.2	146.9	85.1	76.2
Online	1,977.0	2,320.4	3,164.8	3,667.2	4,356.0
Total Market	**2,371.7**	**2,610.6**	**3,311.7**	**3,752.3**	**4,432.2**

VIDEO MARKET - SPEND SHIFT TO ONLINE (£ MILLION)



VIDEO RETAIL – DIGITAL

Site-checker 'Get It Right from A Genuine Site' audit the digital video retail market and counted 24 services in the UK where video can be streamed from, and 14 where it can be digitally downloaded or rented from.

DIGITAL VIDEO SERVICES: 2022

SUBSCRIPTION	BUY / RENT
Acorn	Amazon Prime
Amazon Prime	Apple TV
Apple TV	BFI Player
BFI Player	BT TV
Britbox	Find Any Film
BT TV	Google Play
Disney+	Microsoft Films & TV
Google Play	NOW Music
Hayu	Now TV
Lebara Play	Rakuten TV
Mubi	Sky
Netflix	Sony Playstation TV and Video
NOW Music	Talk Talk TV
Now TV	Virgin Media
Rakuten TV	
Showmax	
Sky	
Talk Talk TV	
TVPlayer	
Twitch	
Vimeo	
Virgin Media	
YouTube	
YouTube Music	

Source: getitrightfromagenuinesite.org

VIDEO RETAIL – PHYSICAL

According to Kantar, the total number of bricks and mortar retailers stocking video fell dramatically in 2022, down from 4,210 shops in 2021 to 2,916, a decline of 30.7% year-on-year.

876 fewer supermarkets ranged video product in 2022, continuing a trend that started to accelerate in 2019. Despite that decline, supermarkets still dominate the bricks and mortar channel for video, representing 82% of total outlets selling DVDs and Blu-rays in the UK.

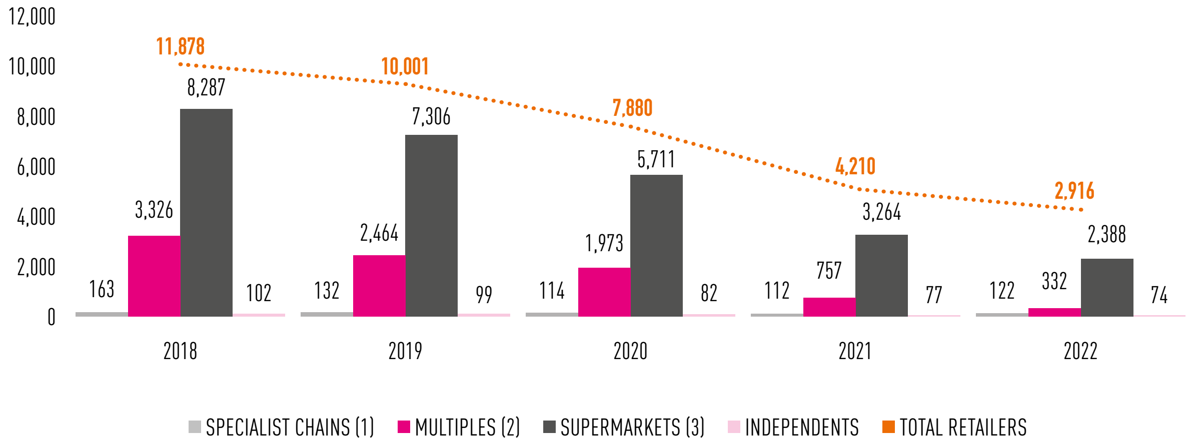
The number of shops in the multiples channel stocking video also fell sharply, down 425 outlets to 332, a decline of 56.1%. hmv - the only retailer left in the specialist sector still selling physical video – stocked product in 10 more stores than in 2021, up to 122, while the indie channel lost a further 3 shops, down to 74.

PRINCIPAL BRICKS & MORTAR RETAILERS SELLING VIDEO

	2018	2019	2020	2021	2022	change 21/22
Specialist Chains (1)	163	132	114	112	122	8.9%
Multiples (2)	3,326	2,464	1,973	757	332	-56.1%
Supermarkets (3)	8,287	7,306	5,711	3,264	2,388	-26.8%
Independents	102	99	82	77	74	-3.9%
Total Retailers	**11,878**	**10,001**	**7,880**	**4,210**	**2,916**	**-30.7%**

Source: Kantar
(1) Specialist Chain - HMV
(2) Multiples are Urban Outfitters, WHSmith, Matalan, Primark, Boots, Moto, Original Factory Store, B&M, Easons, and SemiChem. (Changes are most likely due to withdrawal from Audio and Video retailing/stocking).
(3) Supermarkets include Asda, Morrisons, Sainsbury's (including Locals*), Tesco (including Metro and Express*), Waitrose*, Co-Op*, and One-Stop* (*That sell audio and video titles).
NOTE: Supermarkets merged with Multiples in 2022

NO. OF BRICKS & MORTAR RETAILERS SELLING VIDEO



VIDEO RETAILERS – PHYSICAL

After two years of damaging restrictions, the UK's high street specialist and supermarket channels enjoyed a return to relatively normal trading conditions through 2022, allowing traditional bricks and mortar shops to compete for share of the DVD and Blu-ray market more effectively.

The high street channel in particular capitalised, managing to return 40% year-on-year growth in physical video product revenues, pushing spend totals back up through the £50m mark. Achieved against a backdrop of falling consumer demand, Specialist share rebounded from 15% in 2021, to 24% in 2022.

The number of supermarket outlets selling DVDs and Blu-rays fell by more than 25% in 2022, while many others reduced floorspace dedicated to video. As a consequence, spend in the channel declined by almost 50% to £26.1m, with market share contracting to just 12.5%.

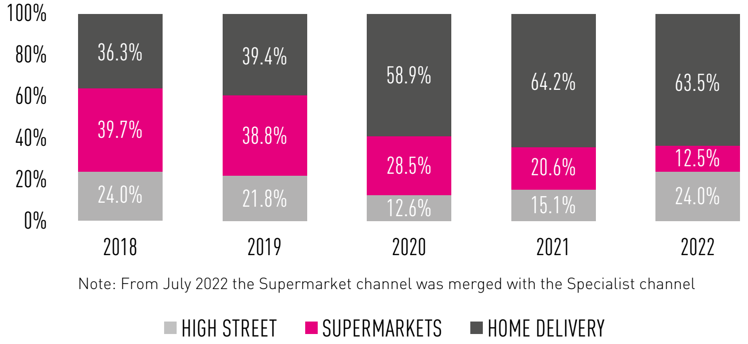
For context, in 2018, supermarket share stood at around 40%.

During the pandemic, the UK's physical online retailers helped satisfy consumer demand for DVDs and Blu-rays as other retailers were forced to close. This helped the channel build share significantly, growing from 39% in 2019, to over 64% in 2021. As the high streets and supermarkets re-opened, revenues and share declined a little through 2022, with sales worth £132.8m down 12.5% year-on-year and share slipping from 64.2% to 63.5%.

PHYSICAL FORMAT £ SPEND SHARE BY RETAILER TYPE VIDEO

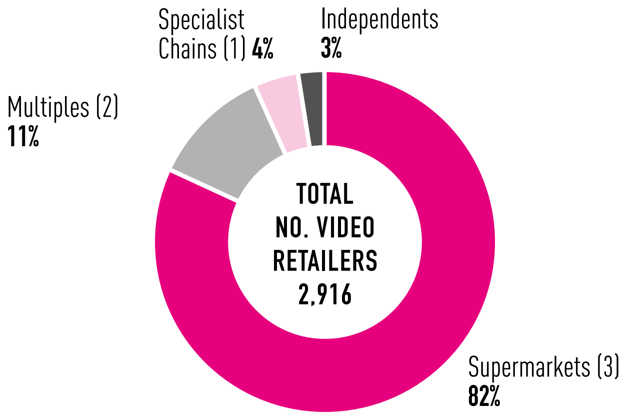
Retail Type	2018	2019	2020	2021	2022
High Street	148.2	103.9	44.7	35.7	50.1
Supermarkets	245.0	185.1	101.4	48.8	26.1
Home Delivery	223.7	188.2	209.6	151.7	132.8
Total Market	**616.9**	**477.2**	**355.7**	**236.2**	**209.0**

VIDEO MARKET - PHYSICAL FORMAT SHARE BY RETAILER TYPE (£ MILLION)



Note: From July 2022 the Supermarket channel was merged with the Specialist channel

SHARE OF TOTAL VIDEO RETAILER ESTATE: 2022



VIDEO CHARTS

The return of Tom Cruise in 'Top Gun: Maverick' was the cinema event of the year in 2022 as the film topped the box office charts, with the £84m taken representing 9% of the annual total, according to the BFI.

This success translated neatly to the sell-through market, with 1.1m units sold across EST and physical formats, representing 17% of total sales across the annual Top 20. Enjoying an unusually long digital window - 10 weeks - it is no surprise that EST dominated format sales, with 841k units representing 73.4% of the total.

'Spiderman – No Way Home' was the only film to deliver volumes anywhere near 'Maverick' with 886k units sold, 69.8% coming on digital.

Overall, it was a much better year for the video category at the top end of the market, with more than 6.6m units sold over the top 20 titles, over 2 million more than last year's Top 20 delivered.

While digital formats took a 56% share of the annual top 20, physical formats took a higher share of the top 20 across 6 of 12 months of 2022.

TOP 20 VIDEO CHART 2022

	Title	Corp. Group	Total Video Units	Total DVD Units	Total Blu-ray Units	Total Digital	% Shr Digital
1	Top Gun - Maverick	Elevation Sales	1,146,768	197,345	108,220	841,202	73.4%
2	Spider-Man - No Way Home	Sony Pictures He	885,581	151,020	116,679	617,883	69.8%
3	Dune (2021)	Warner Home Video	426,614	108,781	121,354	196,479	46.1%
4	The Batman	Warner Home Video	365,891	110,392	109,632	145,867	39.9%
5	Ghostbusters - Afterlife	Sony Pictures He	341,838	78,452	48,669	214,718	62.8%
6	No Time To Die	Warner Home Video	333,970	169,707	71,297	92,965	27.8%
7	Sing 2	Warner Home Video	312,101	72,373	8,961	230,767	73.9%
8	Jurassic World - Dominion	Warner Home Video	289,002	112,482	56,812	119,708	41.4%
9	Downton Abbey - A New Era	Warner Home Video	266,634	173,865	21,752	71,017	26.6%
10	Uncharted	Sony Pictures He	253,166	56,830	26,375	169,961	67.1%
11	Venom - Let There Be Carnage	Sony Pictures He	241,193	99,225	56,566	85,403	35.4%
12	Encanto	Walt Disney Studios	238,539	110,894	14,182	113,463	47.6%
13	Fantastic Beasts - Secrets Of Dumbledore	Warner Home Video	233,327	113,417	47,532	72,378	31.0%
14	Top Gun	Elevation Sales	226,391	41,651	22,932	161,809	71.5%
15	Elvis	Warner Home Video	225,437	125,060	35,425	64,953	28.8%
16	Sonic The Hedgehog 2	Elevation Sales	214,183	43,323	15,170	155,691	72.7%
17	The Matrix Resurrections	Warner Home Video	200,672	66,219	51,370	83,084	41.4%
18	Elf	Warner Home Video	175,637	44,405	4,896	126,334	71.9%
19	Bullet Train	Sony Pictures He	148,185	21,932	21,012	105,240	71.0%
20	Doctor Strange In The Multiverse Of	Walt Disney Studios	131,524	56,331	42,630	32,562	24.8%

Source: Offical Charts Company
EST film volume comprised of data from the following services: Amazon; iTunes; SKY Store; Talk Talk; Rakuten; Virgin
Weighting applied by Official Charts to EST data to take into account "other" EST film services not reporting
Within the chart, only titles available from all of the top 3 services (based on market share) would be eligible to be displayed in the chart in order to preserve retailer confidentiality
Windowed releases through a single service and Service Exclusives excluded from the chart

TOP 20 VIDEO CHART 2022 - DIGITAL VERSUS PHYSICAL WEEK 1 SALES

	Title	Corp. Group	Total Video Units Sold - 2022	Week1 Physical Units	Week1 Digital EST	EST Release Window
1	Top Gun - Maverick	Elevation Sales	1,146,768	113,074	351,052	10 Weeks
2	Spider-Man - No Way Home	Sony Pictures He	885,581	127,545	257,169	3 Weeks
3	Dune (2021)	Warner Home Video	426,614	71,351	29,049	2 Weeks
4	The Batman	Warner Home Video	365,891	80,180	29,056	3 Weeks
5	Ghostbusters - Afterlife	Sony Pictures He	341,838	42,741	74,204	3 Weeks
6	No Time To Die	Warner Home Video	333,970	620,168	73,135	1 Week
7	Sing 2	Warner Home Video	312,101	18,762	18,405	2 Weeks
8	Jurassic World - Dominion	Warner Home Video	289,002	59,284	32,838	2 Weeks
9	Downton Abbey - A New Era	Warner Home Video	266,634	60,624	14,271	2 Weeks
10	Uncharted	Sony Pictures He	253,166	20,898	49,429	2 Weeks
11	Venom - Let There Be Carnage	Sony Pictures He	241,193	58,030	31,620	2 Weeks
12	Encanto	Walt Disney Studios	238,539	20,516	3,843	7 Weeks
13	Top Gun	Elevation Sales	226,391	Released 1989 (No week 1 sales available)		
14	Fantastic Beasts - Secrets Of Dumbledore	Warner Home Video	233,327	49,005	9,235	2 Weeks
15	Elvis	Warner Home Video	225,437	40,900	12,344	No Window
16	Sonic The Hedgehog 2	Elevation Sales	214,183	19,682	46,607	8 Weeks
17	The Matrix Resurrections	Warner Home Video	200,672	30,897	16,713	1 Week
18	Elf	Warner Home Video	175,637	158,674	Released 2004	
19	Bullet Train	Sony Pictures He	148,185	9,669	26,408	3 Weeks
20	Doctor Strange In The Multiverse Of	Walt Disney Studios	131,524	34,850	9,375	2 Weeks

Source: Offical Charts Company
EST film volume comprised of data from the following services: Amazon; Apple Video; SKY Store; Talk Talk; Rakuten
Weighting applied by Official Charts to EST data to take into account "other" EST film services not reporting
Within the chart, only titles available from all of the top 3 services (based on market share) would be eligible to be displayed in the chart in order to preserve retailer confidentiality
Windowed releases through a single service and Service Exclusives excluded from the chart

OFFICIAL TOP 20 EST VIDEO CHART 2022

	Title	Corp. Group	Total EST Video Units Sold
1	Top Gun - Maverick	Elevation Sales	841,202
2	Spider-Man - No Way Home	Sony Pictures He	617,883
3	Sing 2	Warner Home Video	230,767
4	Ghostbusters - Afterlife	Sony Pictures He	214,718
5	Dune (2021)	Warner Home Video	196,479
6	Uncharted	Sony Pictures He	169,961
7	Top Gun	Elevation Sales	161,809
8	Sonic The Hedgehog 2	Elevation Sales	155,691
9	The Batman	Warner Home Video	145,867
10	Elf	Warner Home Video	126,334
11	Jurassic World - Dominion	Warner Home Video	119,708
12	Encanto	Walt Disney Studios	113,463
13	Bullet Train	Sony Pictures He	105,240
14	No Time To Die	Warner Home Video	92,965
15	The Grinch (Animated)	Warner Home Video	91,315
16	Paw Patrol - The Movie	Elevation Sales	89,032
17	Venom - Let There Be Carnage	Sony Pictures He	85,403
18	The Matrix Resurrections	Warner Home Video	83,084
19	The Lost City	Elevation Sales	81,841
20	The King's Man	Walt Disney Studios	75,747

Source: Official Charts Company
EST film volume comprised of data from the following services: Amazon; iTunes; SKY Store; Talk Talk; Wuaki
Weighting applied by Official Charts to EST data to take into account "other" EST film services not reporting
Windowed releases through a single service and Service Exclusives excluded from the chart.

TOP 20 VOD VIDEO CHART 2022 (OCT 2022)

	Title	Corp. Group	Total VOD Video Units Sold
1	Top Gun	Paramount	487,457
2	Spider-Man - No Way Home	Sony Pictures He	456,290
3	Uncharted	Sony Pictures He	419,972
4	No Time To Die	Mgm	400,770
5	The Lost City	Paramount	347,745
6	Venom - Let There Be Carnage	Sony Pictures He	329,635
7	Top Gun - Maverick	Paramount	326,458
8	Ghostbusters - Afterlife	Sony Pictures He	322,128
9	The Batman	Warner Home Video	272,674
10	Sing 2	Universal Pictures	216,194
11	Fantastic Beasts - Secrets Of Dumbledore	Warner Home Video	213,418
12	House Of Gucci	Mgm	203,414
13	Dune (2021)	Warner Home Video	173,337
14	Jurassic World - Dominion	Universal Pictures	172,830
15	Sonic The Hedgehog 2	Paramount	157,889
16	Operation Mincemeat	Warner Home Video	156,608
17	Morbius	Sony Pictures He	150,256
18	Jackass Forever	Paramount	149,252
19	Downton Abbey - A New Era	Universal Pictures	146,234
20	Belfast	Universal Pictures	134,411

Source: Official Charts Company
Note: VOD reporting is subject to delays and full-year end chart not available at time of publication. The above chart represents VOD transactions measured between January and October 2022. The reporting panel consists of rental information from Amazon, Apple, Rakuten, Sky Store and TalkTalk.
A confidential upweighting has been applied to services active in VOD but not currently reporting. Windowed releases through one service and retailer exclusives will be excluded from all charts but volume included within market level figures (where data has been delivered to us).

VIDEO CHARTS

OFFICIAL TOP 20 PHYSICAL VIDEO CHART 2022

	Title	Corp. Group	Total Video Units Sold	Total DVD Units Sold	Total Blu-ray Units Sold
1	Top Gun - Maverick	Elevation Sales	305,565	197,345	108,220
2	Spider-Man - No Way Home	Sony Pictures He	267,698	151,020	116,679
3	No Time To Die	Warner Home Video	241,004	169,707	71,297
4	Dune (2021)	Warner Home Video	230,135	108,781	121,354
5	The Batman	Warner Home Video	220,024	110,392	109,632
6	Downton Abbey - A New Era	Warner Home Video	195,616	173,865	21,752
7	Jurassic World - Dominion	Warner Home Video	169,294	112,482	56,812
8	Fantastic Beasts - Secrets Of Dumbledore	Warner Home Video	160,949	113,417	47,532
9	Elvis	Warner Home Video	160,485	125,060	35,425
10	Venom - Let There Be Carnage	Sony Pictures He	155,791	99,225	56,566
11	Ghostbusters - Afterlife	Sony Pictures He	127,120	78,452	48,669
12	Encanto	Walt Disney Studios	125,076	110,894	14,182
13	The Matrix Resurrections	Warner Home Video	117,588	66,219	51,370
14	Doctor Strange In The Multiverse Of	Walt Disney Studios	98,961	56,331	42,630
15	Uncharted	Sony Pictures He	83,205	56,830	26,375
16	Sing 2	Warner Home Video	81,334	72,373	8,961
17	Eternals	Walt Disney Studios	80,589	47,803	32,786
18	Top Gun/Top Gun Maverick	Elevation Sales	79,732	48,192	31,540
19	Thor - Love And Thunder	Walt Disney Studios	79,019	47,682	31,336
20	Belfast	Warner Home Video	76,249	67,880	8,369

Source: Offical Charts Company / BASE

MUSIC

RETAIL SALES OF MUSIC

VALUE **£1,987bn**

YOY CHANGE **3%** ↑

AUDIO STREAMS

VALUE **£1,661bn**

YOY CHANGE **5%** ↑

SALES OF VINYL

VALUE **£151m**

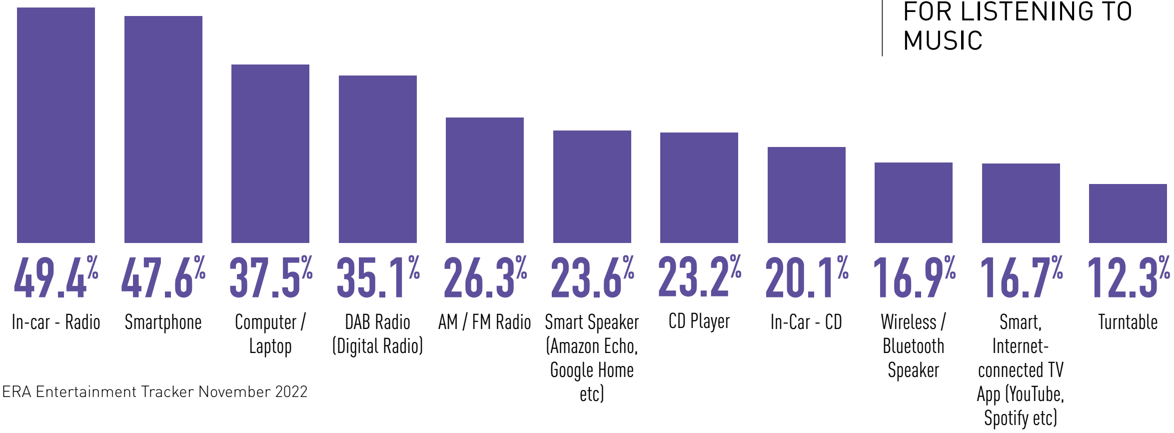
YOY CHANGE **11%** ↑

HARRY'S HOUSE TOPPED
THE ALBUMS CHART WITH
SALES OF **460,000**

MEET THE MUSIC CONSUMER

The In-Car Radio is still the most used device to access music

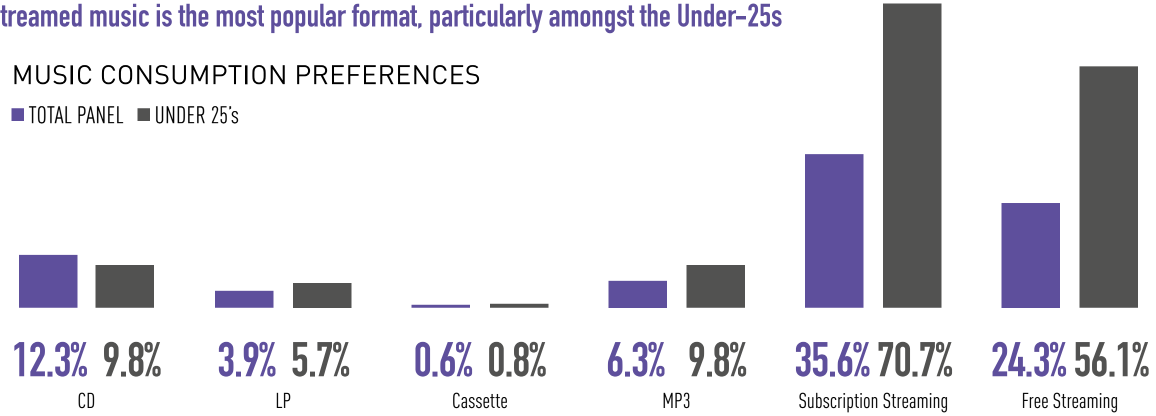
TOP DEVICES USED FOR LISTENING TO MUSIC



ERA Entertainment Tracker November 2022

Streamed music is the most popular format, particularly amongst the Under-25s

MUSIC CONSUMPTION PREFERENCES



ERA Entertainment Tracker November 2022

Based on indicative ERA Tracker panel data from 2,000 UK respondents, Spotify leads the way as a destination for streamed music

WHERE MUSIC STREAMERS LISTENED

74.7%	Spotify
33.4%	Amazon Music
15.4%	Apple Music
14.3%	YouTube Music
4.4%	Soundcloud
4.2%	Deezer
1.8%	Tidal

% Amazon Music Unlimited and Amazon Prime Music

ERA Quarterly Tracking Study (November 2022)
(conducted by FlyResearch)

MUSIC OVERVIEW

Last year saw robust gains in the streaming sector offset declines in the physical format market, pushing overall spend in the music category up 3% year-on-year. Nearly £2bn was spent on streaming subscriptions, vinyl LPs, CDs, and MP3s in 2022 – the ninth consecutive year of growth.

According to ERA / BPI estimates, spend in the subscription streaming market surged through the £1.6bn mark, up 5% versus 2021, accounting for 84% of total music category value.

As measured by the Official Charts Company, over 170 billion streams were recorded across subscription and ad-funded tiers in 2022, up 6.6% year-on-year.

After posting vinyl-driven growth in 2021, spend on combined physical format albums fell back in 2022, down 3.9% to £276.5m. The buoyant vinyl LP market continues to forge ahead, bursting through the £150m mark in 2022. Vinyl now generates more revenue than CDs in the UK, taking an 8% share of total category spend.

Down 17.4% year-on-year, CD album sales declined to £124m, which represents a 6% share of the total music pie, while spend on niche physical formats also fell, down 4.4% to £1.9m.

The digital MP3 albums market posted another double-digit reverse in 2021, down 17.5% to £27.5m, which amounts to just 1% of total category value.

The singles market contracted again in 2022, down 14.4% to £21.8m. While combined physical singles sales grew by 3.8% to £3.9m, the MP3 tracks market shrank by 17.6% year-on-year finishing on £17.8m.

MUSIC - VALUE (£MILLION)

	2020	2021	2022	change 21/22
CD	156.2	150.1	124.0	-17.4%
Vinyl LP	110.1	135.6	150.5	11.0%
Other Physical Albums	1.9	2.0	1.9	-4.4%
Total Physical Albums*	**268.1**	**287.7**	**276.5**	**-3.9%**
Digital Albums	43.5	33.4	27.5	-17.5%
Total Albums	**311.6**	**321.1**	**304.0**	**-5.3%**
Vinyl Singles	3.1	3.3	3.3	-0.5%
CD & Other Physical Singles	0.4	0.5	0.7	31.3%
Total Physical Singles	**3.5**	**3.8**	**3.9**	**3.8%**
Digital Singles**	28.7	21.6	17.8	-17.6%
Total Singles	**32.2**	**25.4**	**21.8**	**-14.4%**
Subscription Streaming ***	**1,391.0**	**1,582.3**	**1,661.1**	**5.0%**
Total Music	**1,734.9**	**1,928.9**	**1,986.9**	**3.0%**

*Upweighted by 5% from Official Charts numbers to reflect 100% of market
**Combines single track and bundle sales
***ERA / BPI estimate

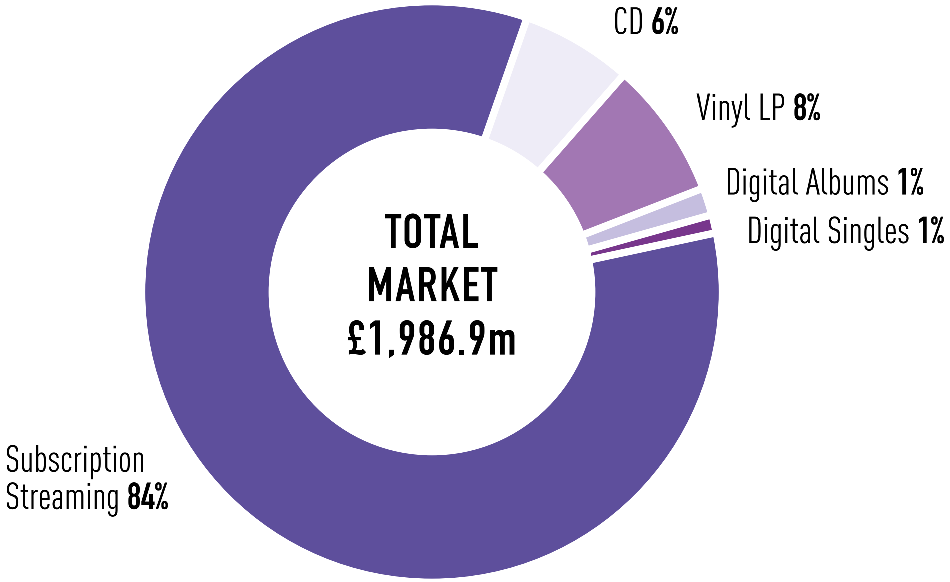
MUSIC - UNITS (MILLION)

	2020	2021	2022	change 21/22
CD	16.9	15.1	12.2	-19.3%
Vinyl LP	5.1	5.6	5.8	2.9%
Other Physical Albums	0.2	0.2	0.2	0.7%
Total Physical Albums*	**22.2**	**21.0**	**18.2**	**-13.1%**
Digital Albums	5.9	4.6	3.7	-18.9%
Total Albums	**28.1**	**25.6**	**21.9**	**-14.1%**
Vinyl Singles	0.3	0.3	0.2	-7.8%
CD & Other Physical Singles	0.1	0.2	0.2	12.2%
Total Physical Singles	**0.4**	**0.4**	**0.4**	**0.1%**
Digital Singles**	31.3	23.7	19.5	-17.8%
Total Singles	**31.7**	**24.1**	**19.9**	**-17.5%**
Audio Streams	139,283.0	147,218.9	159,300.2	8.2%
Video Streams	13,945.6	12,492.5	10,884.1	-12.9%
Total Streams	**153,228.6**	**159,711.4**	**170,184.4**	**6.6%**
Streaming Equivalent Albums***	125.2	132.4	143.1	8.1%
Total Album Equivalent Sales	**156.5**	**160.3**	**167.0**	**4.2%**

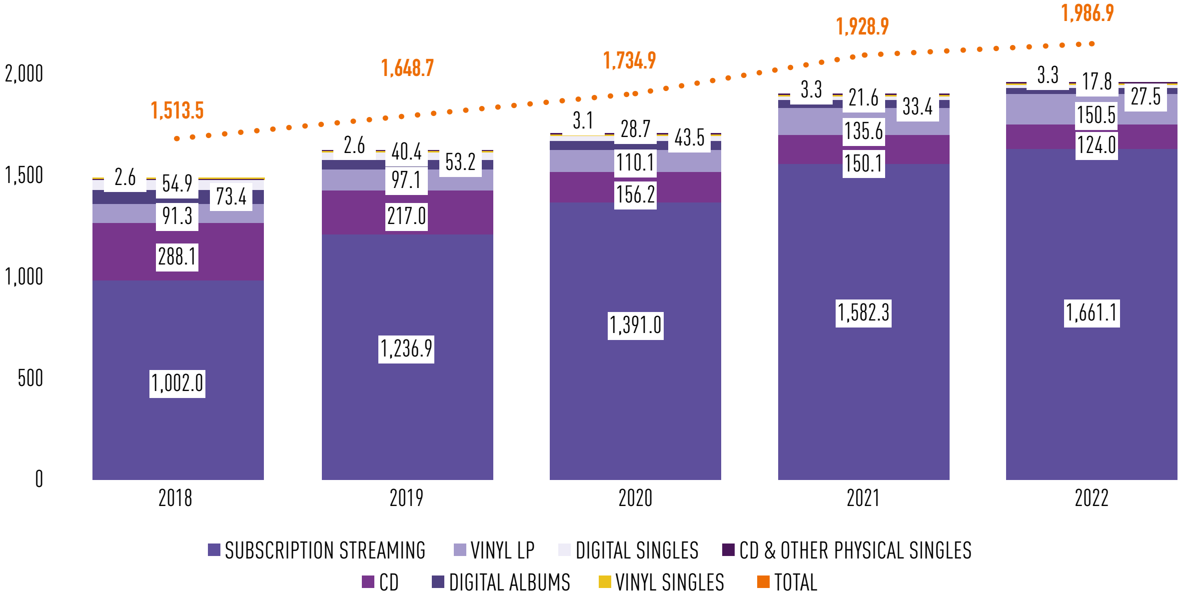
Source: Official Charts Company. *Upweighted by 5% from Official Charts numbers to reflect 100% of market. **Combines single track and bundle sales. *** Streaming Equivalent Albums (audio and video streams divided by 6,000 or 1,000 according to source (premium or ad-supported))

MUSIC SALES BY SEGMENT

MUSIC MARKET 2022: SHARE BY FORMAT



MUSIC MARKET BY SEGMENT (£M)



Physical and Downloads: Official Charts Company
Subscription Streaming: ERA / BPI Estimates

THE STREAMING MUSIC MARKET

According to the Official Charts Company, 137.7bn premium streams were recorded in 2022 across the paid-for subscription tier, up 8.5% year-on-year, accounting for 81% of total streams volume. 32.5bn streams were recorded across the ad-funded, free tier – down 1% - making up 19% of the total.

Audio's share of the streaming market moved further ahead of video in 2022 with a total 159.3bn streams recorded, up 8.2% versus 2021, securing 94% of the total market. Video-only streams declined in 2022, down 12.9% versus 2021 totals to 10.9bn.

Digging deeper into the audio-only streaming segment, paid-for premium streams grew by 8.5% to 137.3bn in 2022 representing 86% of the total audio-only volume. The ad-funded market enjoyed a bump too, up 6.7% to 22bn. Combined, the audio streams market is up 8.2% to 159.3bn.

In contrast to audio streaming, In the video-only streaming segment is dominated by free, ad-funded plays. 10.5bn ad-funded video streams were recorded in 2022, down 13.9% versus 2021 amounting to 98% of total video streams. While only 2% of the market, the premium video streaming segment is in growth, with the 384m recorded up 28% year-on-year.

In terms of the label market share, around 73% of total streams were by artists and bands signed to one the three major record labels – Universal Music, Sony Music and Warner Music – while 26% belonged to performers signed to independent record labels.

STREAMING MARKET - CHART-ELIGIBLE PREMIUM VERSUS AD-FUNDED - UNITS (MILLION)

	2020	2021	2022	change 21/22
Audio & Video Premium	119,562.6	126,881.9	137,674.1	8.5%
Audio & Video Ad-Funded	33,666.0	32,829.5	32,510.3	-1.0%
Total Streams	**153,228.6**	**159,711.4**	**170,184.4**	**6.6%**

Note: Audio Streams also includes static video and lyric videos
Video Streams only include official claimed video content
Source: Official Charts Company.

STREAMING MARKET - CHART-ELIGIBLE AUDIO VERSUS VIDEO - UNITS (MILLION)

	2020	2021	2022	change 21/22
Audio Streams	139,283.0	147,218.9	159,300.2	8.2%
Video Streams	13,945.6	12,492.5	10,884.1	-12.9%
Total Streams	**153,228.6**	**159,711.4**	**170,184.4**	**6.6%**

Note: Audio Streams also includes static video and lyric videos
Video Streams only include official claimed video content
Source: Official Charts Company.

STREAMING MARKET - CHART-ELIGIBLE AUDIO PREMIUM VERSUS AD-FUNDED - UNITS (MILLION)

	2020	2021	2022	change 21/22
Audio Premium	119,343.5	126,582.1	137,290.3	8.5%
Audio Ad-Funded	19,939.5	20,636.9	22,010.0	6.7%
Total Audio Streams	**90,915.5**	**147,218.9**	**159,300.2**	**8.2%**

Note: Audio Streams also includes static video and lyric videos
Video Streams only include official claimed video content
Source: Official Charts Company.

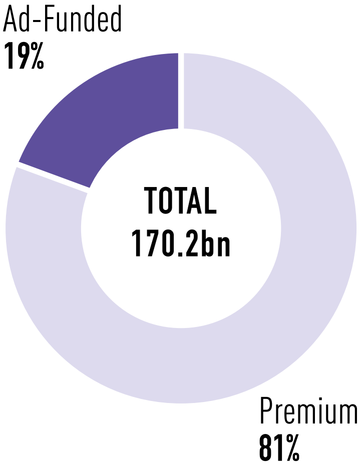
STREAMING MARKET - CHART-ELIGIBLE VIDEO PREMIUM VERSUS AD-FUNDED - UNITS (MILLION)

	2020	2021	2022	change 21/22
Video Premium	219.1	299.9	383.8	28.0%
Video Ad-Funded	13,726.4	12,192.6	10,500.3	-13.9%
Total Video Streams	**13,945.6**	**12,492.5**	**10,884.1**	**-12.9%**

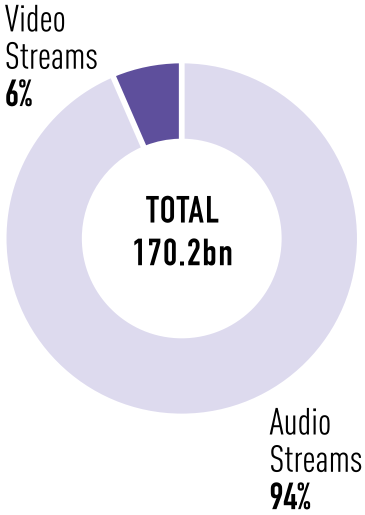
Note: No prem / ad-f splits available for 2018
Audio Streams also includes static video and lyric videos
Video Streams only include official claimed video content
Source: Official Charts Company.

THE STREAMING MUSIC MARKET – CHART ELIGIBLE STREAMS

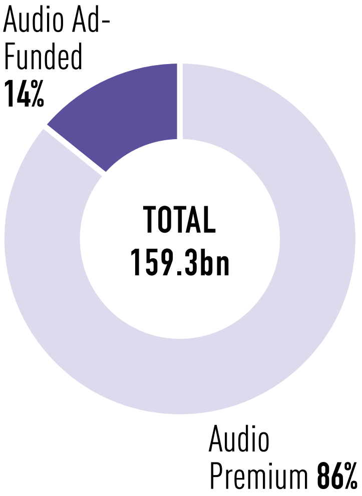
COMBINED AUDIO & VIDEO - PREMIUM VS AD-FUNDED: 2022



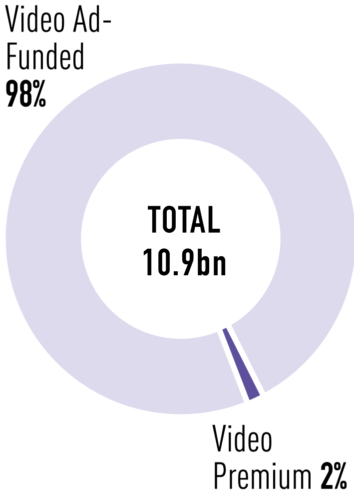
TOTAL AUDIO STREAMS VS TOTAL VIDEO STREAMS: 2022



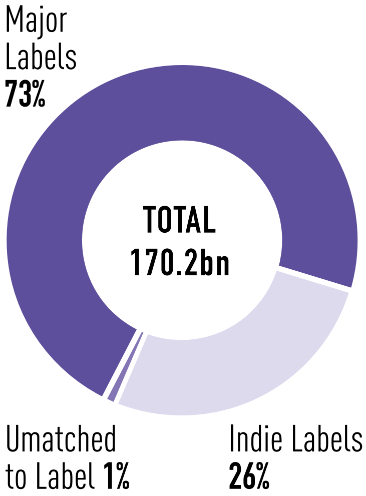
AUDIO STREAMS - PREMIUM VS AD-FUNDED: 2022



VIDEO STREAMS - PREMIUM VS AD-FUNDED: 2022



TOTAL STREAMS - MAJORS VS INDIES % VOLUME SHARE: 2022



Note: Matched, chart-eligible streams only / Audio & video. Source: Official Charts Company

PHYSICAL MUSIC MARKET

Spend on combined physical formats product totalled £280.4m in 2022, down 3.8% year-on-year, with burgeoning vinyl sales not quite enough to offset declines in spend on CDs.

The UK's 400+ independent record shops enjoyed a full year of uninterrupted trading, helping drive those vinyl LP sales north: 5.8m units were sold in 2022, up 2.9%, generating £150.5m at retail, up 11% year-on-year. In contrast, CD album volumes fell 19.3% to 12.2m units, although rising average selling prices saw more value retained, ending 17.4% down at £124m.

PHYSICAL FORMAT MUSIC - VALUE (£ MILLION)

	2020	2021	2022	change 21/22
CD	156.2	150.1	124.0	-17.4%
Vinyl LP	110.1	135.6	150.5	11.0%
Other Physical Albums	1.9	2.0	1.9	-4.4%
Total Physical Albums*	**268.1**	**287.7**	**276.5**	**-3.9%**
Vinyl Singles	3.1	3.3	3.3	-0.5%
CD & Other Physical Singles	0.4	0.5	0.7	31.3%
Total Physical Singles*	**3.5**	**3.8**	**3.9**	**3.8%**
Total Physical Music*	**271.6**	**291.5**	**280.4**	**-3.8%**

PHYSICAL FORMAT MUSIC - UNITS (MILLION)

	2020	2021	2022	change 21/22
CD	16.9	15.1	12.2	-19.3%
Vinyl LP	5.1	5.6	5.8	2.9%
Other Physical Albums	0.2	0.2	0.2	0.7%
Total Physical Albums*	**22.2**	**21.0**	**18.2**	**-13.1%**
Vinyl Singles	0.2	0.3	0.2	-12.9%
CD & Other Physical Singles	0.1	0.1	0.2	130.7%
Total Physical Singles*	**0.3**	**0.4**	**0.4**	**20.4%**
Total Physical Music*	**22.5**	**21.4**	**18.7**	**-12.6%**

*Upweighted by 5% from Official Charts numbers to reflect 100% of market

THE VINYL MARKET

According to the Official Charts Company, the vinyl LP market recorded annual growth in both volume and value terms in 2022, with unit sales up 2.9% to 5.8m pushing value through the £150m, up 11%.

Vinyl share of the combined physical format album market moved above 50% for the first time this century, securing 54.5% of total spend last year – more than double the share it had in 2019.

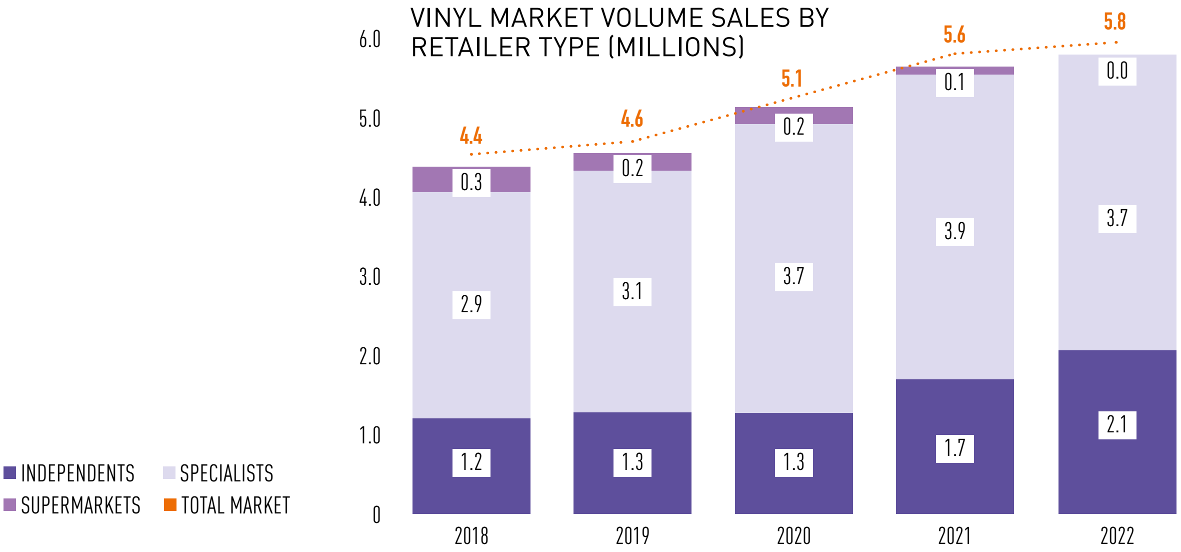
Over 2m albums were sold through the UK's independent sector, with the channel continuing to recover share lost during the pandemic-affected 2020 and 2021, plus some, moving from 30.3% of the market to 35.8% - the Indie's highest take since 2014.

Around 3.7m vinyl album units were shifted through the specialist channel – which includes hmv and home delivery operators like Amazon – accounting for 64% of total sales, down from 69% in 2021.

In July, Kantar merged the supermarkets into the specialists channel as more grocers exit the music category altogether. While not completely absent from the music offers that remain on supermarket shelves, 2022 sales were likely to be far below the 50k units recorded in 2021.

	VINYL ALBUMS - VALUE (£M)			VINYL ALBUMS - UNITS (MILLIONS)							
Year	Total Vinyl Album Market Value (£m)	Year-on-Year % Variance	Vinyl as % of Total Physical Album £	Total Market Volume (m)	Year-on-Year % Variance	Specialist Units	Supermarket Units	Independent Units	Specialist % Share	Supermarket % Share	Independent % Share
2013	14.7	101.4%	1.2%	0.8	101.2%	0.5		0.4	55.6%	0.0%	44.4%
2014	25.9	76.2%	2.7%	1.4	64.4%	0.9		0.5	63.7%	0.0%	36.3%
2015	42.5	64.1%	5.0%	2.2	63.7%	1.5	0.0	0.7	68.0%	0.3%	31.6%
2016	65.6	54.4%	8.3%	3.4	52.3%	2.3	0.2	0.8	68.4%	6.9%	24.7%
2017	87.7	33.7%	14.0%	4.3	26.8%	2.8	0.3	1.1	65.9%	8.0%	26.1%
2018	91.3	4.1%	19.1%	4.4	1.6%	2.9	0.3	1.2	65.4%	7.1%	27.6%
2019	97.1	6.4%	24.0%	4.6	4.2%	3.1	0.2	1.3	66.8%	5.2%	28.0%
2020	110.1	13.3%	30.8%	5.1	11.3%	3.7	0.2	1.3	72.0%	3.1%	24.9%
2021	135.6	23.2%	41.0%	5.6	10.6%	3.9	0.1	1.7	68.7%	1.0%	30.3%
2022	150.5	11.0%	54.5%	5.8	2.9%	3.7		2.1	64.2%	0.0%	35.8%

Source: Official Charts. Note: Home Delivery volumes counted in 'Specialist' From July 2022 the Supermarket channel was merged with the Specialist channel


VINYL MARKET VOLUME SALES BY RETAILER TYPE (MILLIONS)

NEW RELEASE V CATALOGUE – VINYL

While vinyl new release sales grew year-on-year by almost 6% in volume and 10% in value, the format remains majority-catalogue. Despite narrowing annual growth in older vinyl product – up 1% to 3.6m units and 12% in value to £90.7m – catalogue represented around 61% of total format sales in 2022.

Share in the CD market shifted more decisively towards catalogue, despite sales of older albums declining by around 10% in 2022. In terms of new release, sales declined at a much faster rate, down around 27% in volume and 24% in value versus 2021.

For the first time ever new release titles secured less than 50% of total yearly CD volume, falling from 50.3% to 45.3% in 2022, although strong ASPs means sales value remained majority new release at 51%.

VINYL LP ALBUMS: NEW RELEASE VERSUS CATALOGUE - VALUE (£M)

	2020	2021	2022	change 21/22
New Release	40.2	54.5	59.9	9.7%
Catalogue	69.8	81.0	90.7	11.9%
Total LP	**110.1**	**135.6**	**150.5**	**11.0%**
New Release as % of market	36.5%	40.2%	39.8%	

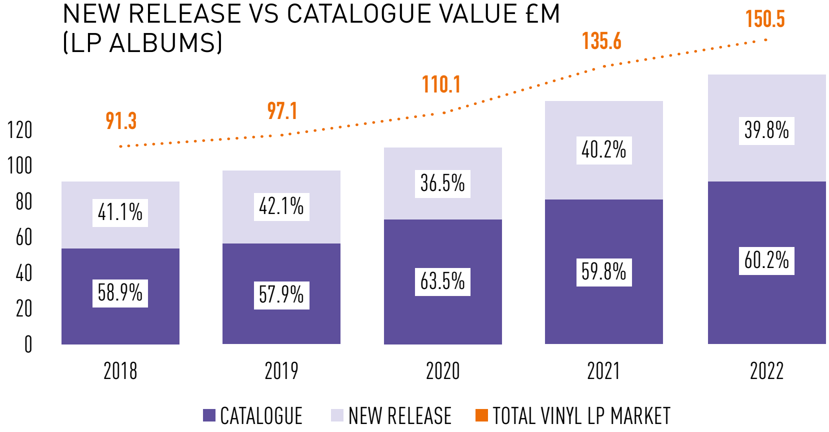
Source: Official Charts Company / ERA Weighted to reflect 100% of market

VINYL LP ALBUMS: NEW RELEASE VERSUS CATALOGUE - UNITS (M)

	2020	2021	2022	change 21/22
New Release	1.7	2.1	2.2	5.9%
Catalogue	3.4	3.5	3.6	1.0%
Total LP	**5.1**	**5.6**	**5.8**	**2.9%**
New Release as % of market	33.1%	37.4%	38.5%	

Source: Official Charts Company / ERA Weighted to reflect 100% of market

NEW RELEASE VS CATALOGUE VALUE £M (LP ALBUMS)



NEW RELEASE V CATALOGUE CD

New release CD continued to bear the brunt of the decline down 23.6% in 2022, with catalogue CD seeing a more modest 9.8% decline. New release as a share of market continued to drift downwards in 2022 and now accounts for 51% of the market in value terms and just 45.3% in volume terms.

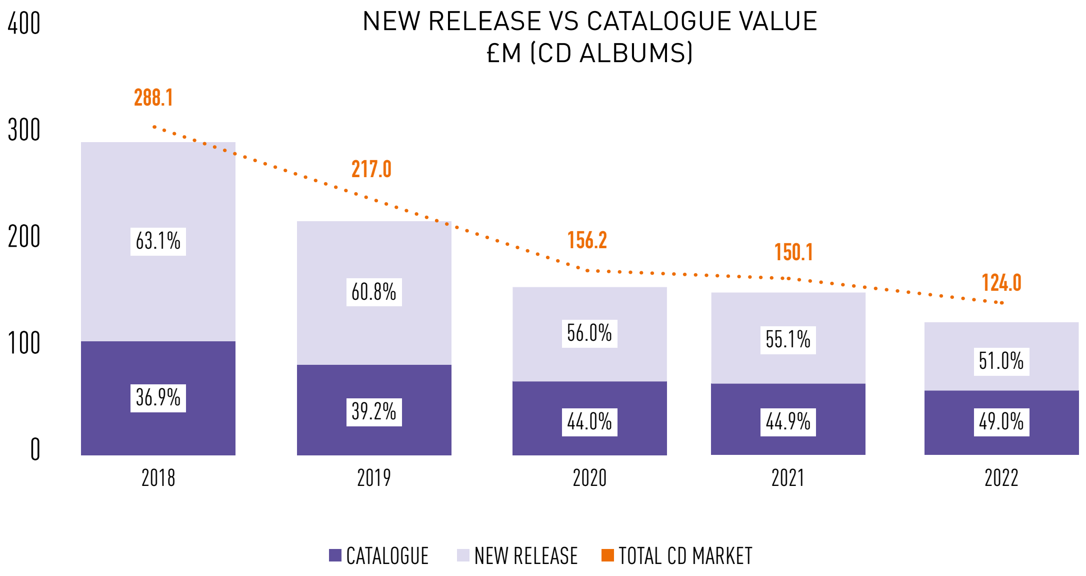
CD ALBUMS: NEW RELEASE VERSUS CATALOGUE - VALUE (£M)

	2020	2021	2022	change 21/22
New Release	87.5	82.7	63.2	-23.6%
Catalogue	68.8	67.4	60.8	-9.8%
Total CD	**156.2**	**150.1**	**124.0**	**-17.4%**
New Release as % of market	56.0%	55.1%	51.0%	

CD ALBUMS: NEW RELEASE VERSUS CATALOGUE - UNITS (M)

	2020	2021	2022	change 21/22
New Release	8.6	7.6	5.5	-27.3%
Catalogue	8.4	7.5	6.7	-11.1%
Total CD	**16.9**	**15.1**	**12.2**	**-19.3%**
New Release as % of market	50.6%	50.3%	45.3%	

Source: Official Charts Company / ERA Weighted to reflect 100% of market


NEW RELEASE VS CATALOGUE VALUE £M (CD ALBUMS)

PRODUCT AVAILABILITY

After years of steady decline, the number of new titles made available on CD ticked upwards in 2022, to 14,850, up 2.8% versus 2021, while 16,777 new titles came to other physical formats like vinyl, up 17.6% year-on-year.

26,682 new titles arrived on digital formats in 2022, just one less than arrived in 2021.

The total number of CD titles available has risen by 2.3% to 650,822, around 50k more than are available on digital formats, where the total has grown by 4.6% versus 2021 to just over 600k titles.

There are now over 217k vinyl and other physical format titles in total available for retailers, up 8.4% versus 2021.

NO. OF NEW MUSIC TITLES AVAILABLE BY FORMAT

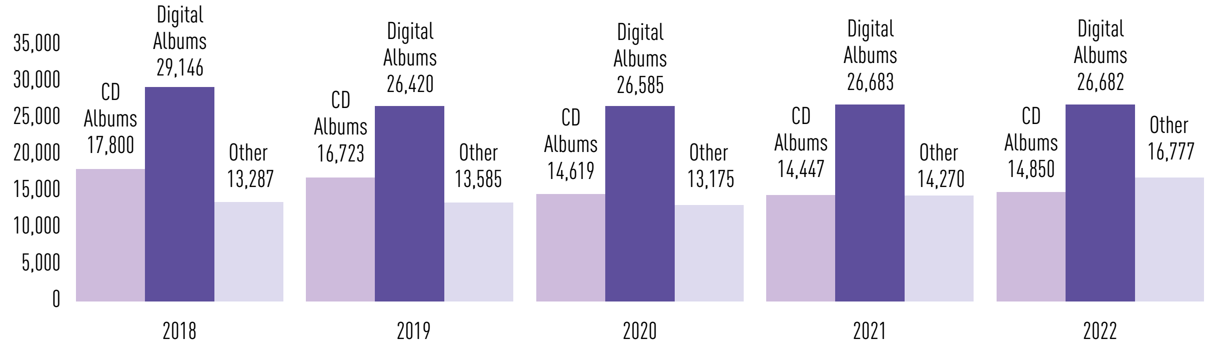
	2018	2019	2020	2021	2022	change 21/22
CD Albums	17,800	16,723	14,619	14,447	14,850	2.8%
Digital Albums	29,146	26,420	26,585	26,683	26,682	0.0%
Other	13,287	13,585	13,175	14,270	16,777	17.6%

TOTAL NO. OF MUSIC TITLES AVAILABLE

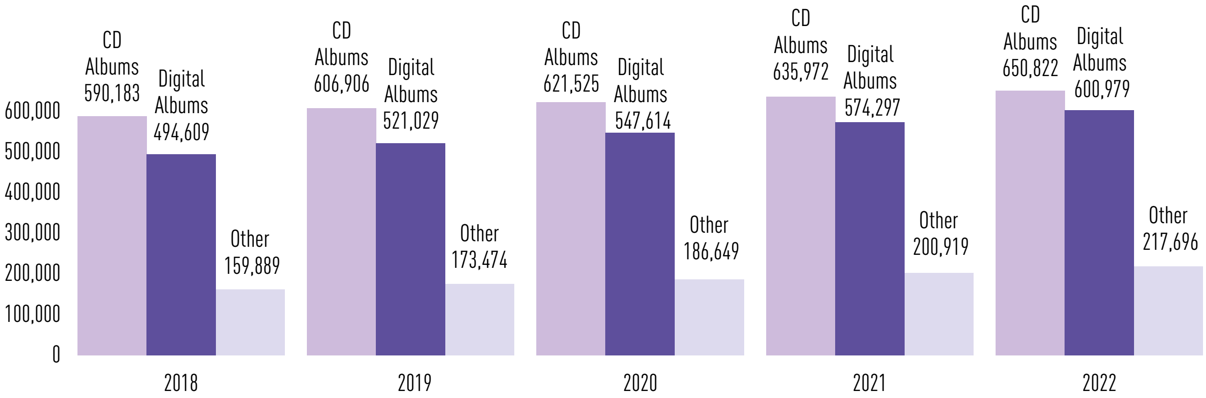
	2018	2019	2020	2021	2022	change 21/22
CD Albums	590,183	606,906	621,525	635,972	650,822	2.3%
Digital Albums	494,609	521,029	547,614	574,297	600,979	4.6%
Other	159,889	173,474	186,649	200,919	217,696	8.4%

Source: Kantar

NO OF NEW TITLES AVAILABLE BY FORMAT



TOTAL NO. OF MUSIC TITLES AVAILABLE



Source: Kantar

AVERAGE SELLING PRICES

Prices in the UK's album market have been rising steadily over the last few years and 2022 saw them inflate yet again. The average transactional price for an album is now £13.68, up £1.35, or 10.9% versus 2021, primarily driven by strong growth in the high-ticket vinyl LP market and a decline in CD and digital album sales.

With pressures on pressing plant capacity remaining high, vinyl dealer prices are pushing further upwards, sending the average price of a LP though the £26 mark, up 8% year-on-year.

While the CD market is not immune from inflationary conditions, with average prices moving through the £10 mark in 2022, that is up just 2.3% versus 2021.

Prices are rising most sharply in the home delivery sector, with the 2022 average up by more than 9% to £14.51. The highest prices, however, are found across the UK's high street specialist and indie retailers, where focus on vinyl is perhaps more concentrated. An album in that channel now costs £15.81 on average, up 5.8% versus 2021 prices.

ALBUM AVERAGE SELLING PRICES BY RETAIL CHANNEL 2022

	2020	2021	2022	change 21/22
Specialists, generalists and independents	£12.75	£14.95	£15.81	5.8%
Supermarkets	£9.78	£9.52	£9.68	1.7%
Home delivery	£12.23	£13.29	£14.51	9.2%
Digital download sites	£7.33	£7.32	£7.44	1.6%
Total Market	**£11.06**	**£12.33**	**£13.68**	**10.9%**

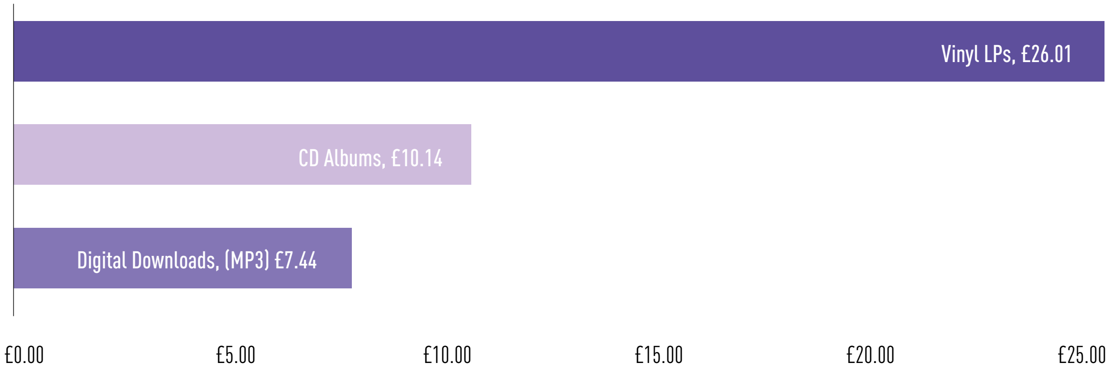
Source: Official Charts / Kantar

ALBUM AVERAGE SELLING PRICES BY FORMAT 2022

	2020	2021	2022	change 21/22
CD Albums	£9.24	£9.91	£10.14	2.3%
Vinyl LPs	£21.62	£24.10	£26.01	8.0%
Digital Downloads (MP3)	£7.33	£7.32	£7.44	1.7%
Total Market	**£11.06**	**£12.33**	**£13.68**	**10.9%**

Source: Official Charts / Kantar

AVERAGE SELLING PRICES BY MUSIC FORMAT - 2022



Source: Kantar

BRICKS & MORTAR VS ONLINE

While the dominant streaming market has been accelerating the transfer of spend in the music category - from bricks and mortar retailers to digital services and home delivery operators - over the last decade or so, that trend was reversed in 2022.

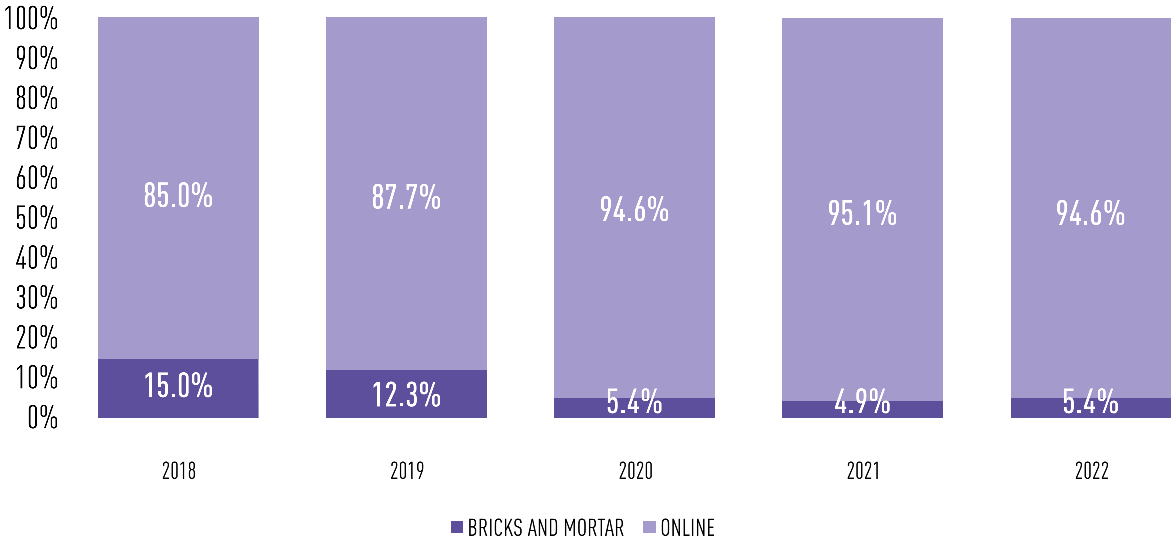
With bricks and mortar retailers capitalising on a high street freed from the trading restrictions imposed during the pandemic, the channel saw sales climb at a steeper rate than spend online, up 12.6% versus 2021.

The £107.5m spent in traditional music specialist shops and supermarkets in 2022 saw bricks and mortar share grew from 4.9% to 5.4%.

BRICKS & MORTAR VERSUS ONLINE SALES
SPLIT (£ MILLION) - MUSIC

	2018	2019	2020	2021	2022
Bricks & Mortar	198.6	179.2	94.0	94.0	107.5
Online	1,122.1	1,274.4	1,640.9	1834.9	1879.3
Total Market	**1,320.6**	**1,453.7**	**1,734.9**	**1928.9**	**1986.9**

MUSIC MARKET - SPEND SHIFT TO ONLINE (£ MILLION)



MUSIC RETAILERS – DIGITAL

DIGITAL MUSIC SERVICES: 2022

Subscription	Download
Amazing Tunes	Amazing Tunes
Amazon Music	Amazon Music
Anghami	Beatport
BBC iPlayer	Bleep
Beatport	Boomkat
Classical Archives	Chandos
Deezer	Emusic
Google Play	Google Play
Highresaudio	Highresaudio
Idagio	HMV Digital
ITunes	ITunes
Jango	Juno Download
Mixcloud	Kobo
Napster	Presto Classical
Primephonic	Primephonic
QObuz	QObuz
Roxi	Saavn
Saavn	Sky
Sky	Traxsoutrce
Soundcloud	
Spotify	
Tidal	
Tunein	
Twitch	
Worldwide.fm	
YouTube	
YouTube Music	

MUSIC RETAILERS – PHYSICAL

The number of retailers selling music once again fell sharply in 2022, according to figures produced Kantar. 2,486 outlets recorded sales of music over the course of the year compared to 3,309 in 2021, a fall of 24.9% year-on-year.

The continuing retreat of the supermarket sector from the music category saw a further 568 stores stop selling CDs and LPs in 2022, while another 284 multiple sector outlets also stopped selling music during the year.

hmv took advantage of a full year of restriction free trading by adding another 10 shops to their estate, bringing the total to 122, just 10 down on pre-pandemic levels.

The Indies strengthened their presence on the high street in 2022 with Kantar recording sales across 426 outlets, a 20-year record high for the sector.

While the supermarket sector saw another steep fall in the number of shops stocking music, the channel still represents 71% of the total music retailer estate, with the indies back on 17% and hmv on 5%.

Information compiled by industry site-checker 'GetItRightFromAGenuineSite.com' lists 27 digital service provider sites where the UK consumer can stream music from and 19 where they can download MP3s.

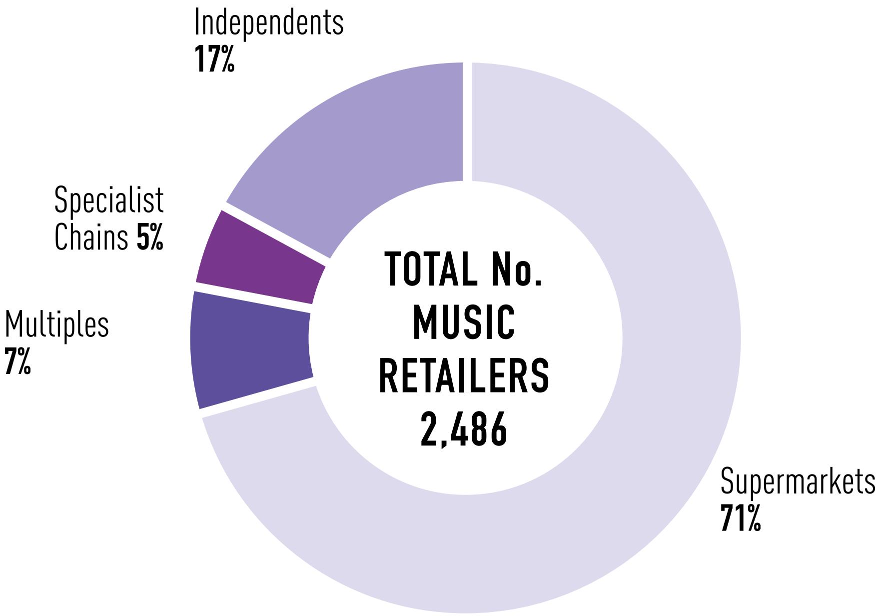
PRINCIPAL BRICKS & MORTAR RETAILERS SELLING MUSIC

	2018	2019	2020	2021	2022	change 21/22
Specialist Chains (1)	163	132	114	112	122	8.9%
Multiples (2)	2,888	2,068	1,551	468	184	-60.7%
Supermarkets (3)	7,181	5,825	4,360	2,322	1,754	-24.5%
Independents	425	425	390	407	426	4.7%
Total Retailers	**10,657**	**8,450**	**6,415**	**3,309**	**2,486**	**-24.9%**

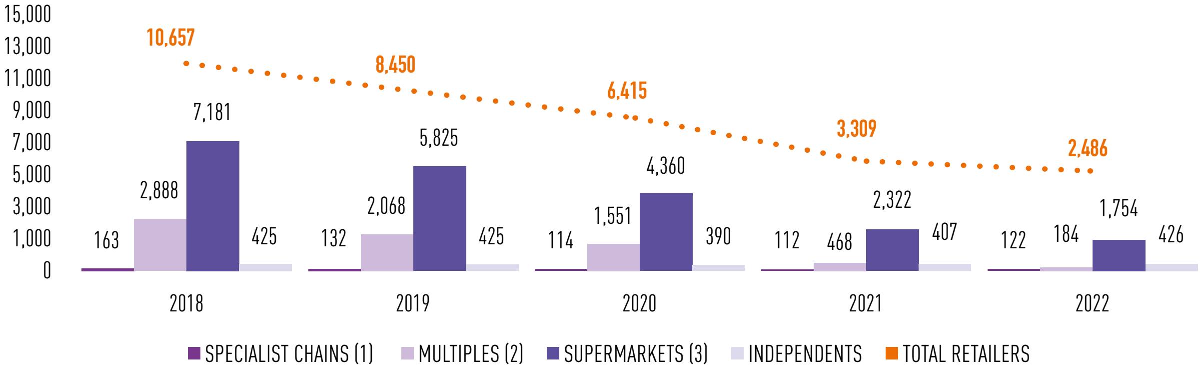
(1) Specialist Chain - HMV
(2) Multiples are Urban Outfitters, WHSmith, Matalan, Primark, Boots, Moto, Original Factory Store, B&M, Easons, and SemiChem. (Changes are most likely due to withdrawal from Audio and Video retailing/stocking).
(3) Supermarkets include Asda, Morrisons, Sainsbury's (including Locals*), Tesco (including Metro and Express*), Waitrose*, Co-Op*, and One-Stop* (*That sell audio and video titles). Supermarkets combined with multiples in July 2022
NOTE: Supermarkets merged with Multiples in 2022

RETAILERS PHYSICAL cont

SHARE OF TOTAL MUSIC RETAILER ESTATE: 2022



NO. OF BRICKS & MORTAR RETAILERS SELLING MUSIC



PHYSICAL FORMAT £ SPEND SHARE BY RETAILER TYPE

One over-arching theme of entertainment retail in 2022 – bricks and mortar, physical format traders recovering from a Covid-disrupted 2020 and 2021 – is played out again when we analyse where CD and vinyl sales were transacted throughout the year.

According to Kantar, spend on physical format albums in Indie high street specialists and hmv surged in 2022, up 40.7% to £96.6m, boosting its share of the market from 24% to 35%.

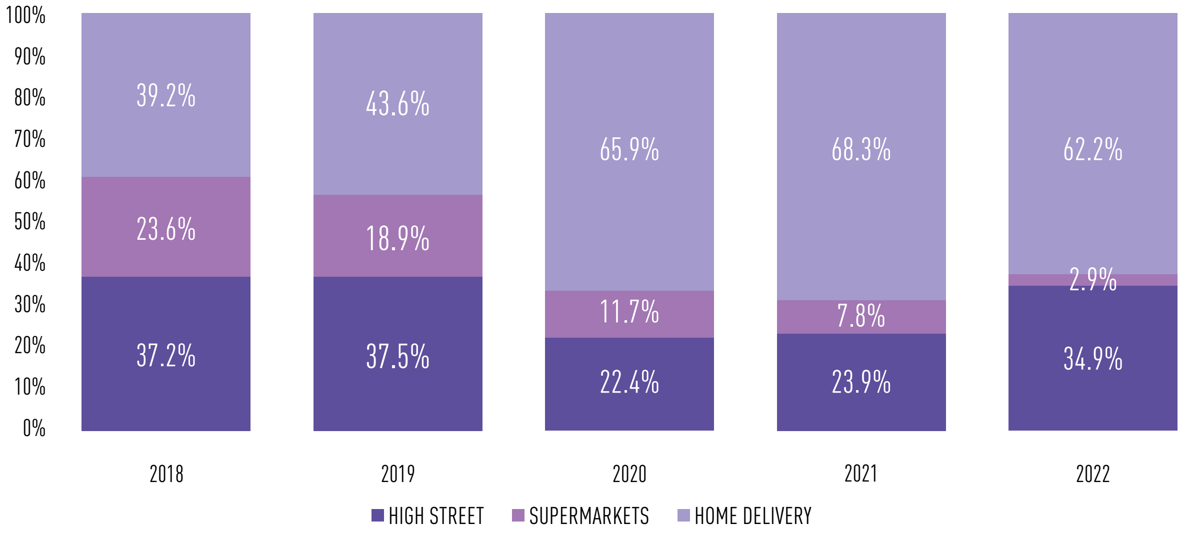
As documented above, a sizeable chunk of the supermarket sector has retreated from the music category altogether, resulting in a 65% decline in sales and a markedly reduced share of revenues, down from 7.8% to 2.9%.

The UK's physical format home delivery operators were heavily relied upon during the two-year pandemic and enjoyed significant revenue growth and market share grab. As trading conditions on the high street normalised in 2022, spend online dipped by 12% to £171.9m. While this resulted in market share contraction – down from 68% to 62% - online remains the most popular destination for the UK's CD and vinyl buyers.

PHYSICAL FORMAT ALBUMS: £ SPEND SHARE BY RETAILER TYPE - MUSIC

	2018	2019	2020	2021	2022
High Street	141.4	118.1	60.0	68.7	96.6
Supermarkets	89.8	59.7	31.3	22.5	7.9
Home Delivery	149.2	137.4	176.8	196.6	171.9
Total Market	**380.4**	**315.3**	**268.1**	**287.7**	**276.5**

PHYSICAL ALBUMS MARKET - PHYSICAL FORMAT SHARE BY RETAILER TYPE (£ MILLION)



OFFICIAL SINGLES CHART 2022

	Title	Artist	Total Units - 2022	Cumulative Units Since Release	Corp. Group
1	As It Was	Harry Styles	1,573,672	1,573,673	Sony Music
2	Bad Habits	Ed Sheeran	1,179,354	2,902,092	Warner Music
3	Peru	Fireboy Dml & Ed Sheeran	1,116,347	1,208,014	Empire/Universal/ Warner
4	Go	Cat Burns	1,109,277	1,124,495	Sony Music
5	Shivers	Ed Sheeran	1,085,981	1,951,876	Warner Music
6	Running Up That Hill	Kate Bush	1,077,284	1,683,088	Warner Music
7	Heat Waves	Glass Animals	1,046,715	2,148,405	Universal Music
8	Where Are You Now	Lost Frequencies/ Calum Scott	990,965	1,117,417	Sony Music/ Universal Music
9	Afraid To Feel	Lf System	978,432	978,433	Warner Music
10	Seventeen Going Under	Sam Fender	941,591	1,283,896	Universal Music
11	We Don't Talk About Bruno	Gaitan/ Castillo/ Adassa/Feliz	914,545	937,552	Universal Music
12	Make Me Feel Good	Belters Only Ft Jazzy	883,337	895,315	Universal Music
13	Cold Heart	Elton John & Dua Lipa	870,701	1,670,464	Universal Music/ Warner Music
14	Starlight	Dave	865,507	865,507	Universal Music
15	Green Green Grass	George Ezra	778,787	778,787	Sony Music
16	Where Did You Go	Jax Jones Ft Mnek	755,680	755,680	Universal Music
17	Abcdefu	Gayle	739,039	958,493	Warner Music
18	Baby	Aitch/Ashanti	738,242	738,242	Universal Music
19	About Damn Time	Lizzo	728,104	728,103	Warner Music
20	I Ain't Worried	Onerepublic	725,637	725,637	Universal Music

Source: Official Charts

MUSIC CHARTS

New releases struggled to make a significant impact on the year-end charts, with only four albums with a 2022 release date breaking into the overall Top 20, according to statistics compiled by the Official Charts Company.

Two new releases did, however, enjoy particularly strong sales, with Harry Styles’ ‘Harry’s House’ topping the charts with just over 460k units sold since its release in May.

‘Midnights’ by Taylor Swift, released in October, sold 417k units over the course of the final two months of 2022, enough to take the No.3 slot. Almost 50% of ‘Midnights’ sales came on CDs, LPs and cassettes, helping it top the physical format only Top 20 chart.

The other new releases to make 2022’s Album Top 20 were Artic Monkeys’ ‘The Car’ and George Ezra’s ‘Gold Rush Kid’ with physical formats representing the vast majority of both albums’ sales totals. In ‘The Car’s’ case, over 10k cassettes were sold, making up 8% of total physical sales.

Ed Sheeran’s “=“, released in 2021, shifted 433k units in 2022 – 1,000 more than it did in its year of release – to take the No.2 spot.

The year-end ‘Streamed Tracks Chart’ reveals a list dominated by UK acts, filling 16 of the 20 slots in 2022. Harry Styles’ ‘BRITs Song of the Year’ ‘As It Was’ topped the chart with a total 181m streams measured. Ed Sheeran’s ‘Bad Habits’ secured the No.2 spot with over 150m streamed, while Londoner Cat Burns’ 2020 break out smash, ‘Go’ was still racking up the plays in 2022, with 138m streams enough to take the No.3 slot.

TOP 20 ALBUMS CHART 2022

	Title	Artist	Total Units	Combined Physical Albums	Digital Albums	Album Streams
1	Harry's House	Harry Styles	460,432	150,759	10,641	299,032
2	=	Ed Sheeran	433,021	70,209	12,345	350,467
3	Midnights	Taylor Swift	416,965	206,136	11,679	199,150
4	The Highlights	Weeknd	248,900	7,271	476	241,153
5	Encanto	Motion Picture Cast Recording	242,294	29,114	10,605	202,575
6	Sour	Olivia Rodrigo	224,565	22,324	1,708	200,533
7	Curtain Call - The Hits	Eminem	214,338	8,421	2,423	203,493
8	Diamonds	Elton John	208,779	9,716	3,047	196,016
9	50 Years - Don't Stop	Fleetwood Mac	208,053	2,926	498	204,629
10	Between Us	Little Mix	199,771	10,637	2,081	187,053
11	Gold - Greatest Hits	Abba	197,844	34,525	7,054	156,264
12	Greatest Hits	Queen	193,111	23,313	3,620	166,177
13	Divide	Ed Sheeran	191,370	11,765	2,843	176,762
14	Am	Arctic Monkeys	177,022	31,322	1,000	144,700
15	30	Adele	168,121	54,863	7,780	105,477
16	Time Flies - 1994-2009	Oasis	166,558	3,003	2,091	161,464
17	Fine Line	Harry Styles	163,595	21,726	2,448	139,422
18	The Car	Arctic Monkeys	159,573	129,854	3,584	26,135
19	Gold Rush Kid	George Ezra	157,427	100,197	10,343	46,887
20	Divinely Uninspired To A Hellish Extent	Lewis Capaldi	156,295	12,824	2,844	140,627

Source: Official Charts

CHARTS – STREAMING

TOP 20 STREAMED TRACKS 2022

	Title	Artist	Corp Group	Total Streams	Premium Audio Streams	Ad-Funded Audio Streams	Video Streams
1	As It Was	Harry Styles	Sony Music	180,900,842	143,991,815	19,273,404	17,635,622
2	Bad Habits	Ed Sheeran	Warner Music	150,183,925	106,887,516	18,171,920	25,124,488
3	Go	Cat Burns	Sony Music	138,123,698	102,418,817	16,680,960	19,023,922
4	Peru	Fireboy Dml & Ed Sheeran	Empire/ Universal/ Warner	135,498,593	101,645,934	13,667,186	20,185,473
5	Heat Waves	Glass Animals	Universal Music	133,671,786	96,596,205	24,013,707	13,061,875
6	Shivers	Ed Sheeran	Warner Music	132,270,807	100,078,702	15,899,846	16,292,258
7	We Don't Talk About Bruno	Gaitan/Castillo/ Adassa/Feliz	Universal Music	128,935,759	79,469,651	9,041,637	40,424,471
8	Running Up That Hill	Kate Bush	Warner Music	123,981,471	98,320,455	16,778,603	8,882,412
9	Where Are You Now	Lost Frequencies/ Calum Scott	Sony Music/ Universal Music	119,437,674	89,136,259	12,541,210	17,760,205
10	Make Me Feel Good	Belters Only Ft Jazzy	Universal Music	114,203,245	79,174,922	15,357,413	19,670,909
11	Starlight	Dave	Universal Music	113,789,644	79,557,436	19,543,879	14,688,330
12	Afraid To Feel	Lf System	Warner Music	109,342,194	89,588,562	13,033,466	6,720,165
13	Seventeen Going Under	Sam Fender	Universal Music	107,507,587	88,094,603	7,114,599	12,298,385
14	Cold Heart	Elton John & Dua Lipa	Universal Music/ Warner Music	104,421,603	79,394,632	11,979,357	13,047,613
15	Easy On Me	Adele	Sony Music	92,768,308	65,295,544	12,596,920	14,875,845
16	Overseas	D-Block Europe Ft Central Cee	Universal Music	91,712,795	53,990,654	18,206,427	19,515,714
17	Baby	Aitch/Ashanti	Universal Music	91,626,637	67,859,299	11,369,397	12,397,941
18	Green Green Grass	George Ezra	Sony Music	90,339,870	69,001,024	9,228,420	12,110,425
19	Abcdefu	Gayle	Warner Music	88,599,138	68,099,986	13,774,067	6,725,085
20	Another Love	Tom Odell	Sony Music	85,840,574	59,800,113	13,794,077	12,246,384

Source: Official Charts

CHARTS – PHYSICAL

TOP 20 PHYSICAL ALBUMS 2022						
	Title	Artist	Corp. Group	Total Physical Units Sold	Total CD Units Sold	Total Vinyl LP Units Sold
1	Midnights	Taylor Swift	Universal Music	206,136	114,844	89,163
2	Harry's House	Harry Styles	Sony Music	150,759	64,242	77,955
3	The Car	Arctic Monkeys	Domino Recordings	129,854	67,877	51,545
4	Gold Rush Kid	George Ezra	Sony Music	100,197	86,353	12,623
5	C'mon You Know	Liam Gallagher	Warner Music	80,827	43,390	36,683
6	=	Ed Sheeran	Warner Music	70,209	60,475	9,464
7	Only The Strong Survive	Bruce Springsteen	Sony Music	62,960	52,359	10,601
8	Christmas With Cliff	Cliff Richard	Warner Music	62,313	60,387	1,926
9	A Family Christmas	Andrea/Matteo/ Virginia Bocelli	Universal Music	59,969	58,826	1,143
10	Wet Leg	Wet Leg	Domino Recordings	59,146	28,420	29,484
11	Will Of The People	Muse	Warner Music	57,959	28,891	22,186
12	Xxv	Robbie Williams	Sony Music	54,993	43,797	4,754
13	30	Adele	Sony Music	54,863	46,067	8,659
14	Last Night In The Bittersweet	Paolo Nutini	Warner Music	53,732	34,926	16,426
15	Now That's What I Call Music 111	Various Artists	Sony Music/ Universal Music	53,400	53,400	0
16	Together In Vegas	Michael Ball & Alfie Boe	Universal Music	48,570	46,637	595
17	Silver Bells	Andre Rieu & Johann Strauss Or	Universal Music	48,281	48,281	0
18	Now That's What I Call Music 112	Various Artists	Sony Music/ Universal Music	47,095	47,095	0
19	Being Funny In A Foreign Language	1975	Dirty Hit	46,381	17,236	24,654
20	Now That's What I Call Music 113	Various Artists	Sony Music/ Universal Music	46,080	46,080	0

Source: Official Charts

CHARTS – VINYL

TOP 20 VINYL LP ALBUMS 2022

	Title	Artist	Corp. Group	Total LP Units Sold
1	Midnights	Taylor Swift	Universal Music	89,163
2	Harry's House	Harry Styles	Sony Music	77,955
3	The Car	Arctic Monkeys	Domino Recordings	51,545
4	C'mon You Know	Liam Gallagher	Warner Music	36,683
5	Rumours	Fleetwood Mac	Warner Music	30,101
6	Wet Leg	Wet Leg	Domino Recordings	29,484
7	Being Funny In A Foreign Language	1975	Dirty Hit	24,654
8	Am	Arctic Monkeys	Domino Recordings	23,866
9	Skinty Fia	Fontaines Dc	Partisan	23,062
10	Will Of The People	Muse	Warner Music	22,186
11	The Dark Side Of The Moon	Pink Floyd	Warner Music	21,798
12	Back To Black	Amy Winehouse	Universal Music	18,381
13	Nevermind	Nirvana	Universal Music	17,916
14	The Rise And Fall Of Ziggy Stardust	David Bowie	Simply Vinyl	17,716
15	Older	George Michael	Sony Music	16,429
16	Last Night In The Bittersweet	Paolo Nutini	Warner Music	16,426
17	The Overload	Yard Act	Universal Music	15,991
18	Revolver	Beatles	Universal Music	14,891
19	Seventeen Going Under	Sam Fender	Universal Music	14,546
20	Whatever People Say I Am That's What I'm	Arctic Monkeys	Domino Recordings	13,429

Source: Official Charts

TOP 20 VINYL SINGLES 2022

	Title	Artist	Corp. Group	Total Vinyl Units Sold	Total Vinyl 12" Sold	Total Vinyl 7" Sold
1	God Save The Queen	Sex Pistols	Universal Music	6,312	0	6,312
2	The Lakes	Taylor Swift	Universal Music	4,344	0	4,344
3	Late Night Talking	Harry Styles	Sony Music	3,689	0	3,689
4	Forget Me	Lewis Capaldi	Universal Music	3,552	0	3,552
5	Hey Hey Rise Up	Pink Floyd Ft Andriy Khlyvnyuk	Warner Music	3,247	0	3,247
6	Ooh Do U Fink U R	Suggs & Paul Weller	Bmg	3,215	0	3,215
7	You Make Me Feel Like It's Halloween	Muse	Warner Music	2,465	0	2,465
8	Aphelion	Arab Strap	Rock Action	2,416	0	2,416
9	Especially For You	Kylie Minogue & Jason Donovan	Bmg	2,337	0	2,337
10	Erotica	Madonna	Warner Music	2,290	2,290	0
11	We're Gonna Get There In The End	Noel Gallagher's High Flying	Ignition	2,272	0	2,272
12	Hunter's Moon	Ghost	Universal Music	2,172	0	2,172
13	Brilliant Adventure Ep	David Bowie	Warner Music	2,096	2,096	0
14	Face It Alone	Queen	Universal Music	2,040	0	2,040
15	Rock The Casbah	Clash	Sony Music	2,015	0	2,015
16	Through The Echoes	Paolo Nutini	Warner Music	1,953	0	1,953
17	Dark Days	Yard Act	Memphis Industries	1,846	1,841	6
18	Making A Fire	Foo Fighters	Sony Music	1,791	0	1,791
19	A Celebration	U2	Universal Music	1,776	1,776	0
20	Tainted Love	Soft Cell	Universal Music	1,765	1,735	30

Source: Official Charts

INSIGHT

MARKET DATA

ERA prides itself on best in class data and insight for its members.

Every week we provide market data sourced from Official Charts Company (music and video) and GfK and GSD (games and hardware).

ERA's retail members receive free access to the Official Charts Online service as well as a range of reports from GfK and GSD, which coupled with our own dashboard service available on our members portal means that all of our members have up to date market data at their fingertips wherever they are.

This market data is also supplemented by digital video and games data from Insight specialists such as Omdia and Futuresource.

MUSIC Market Data Available to ERA members	**VIDEO** Market Data available to ERA Members	**GAMES** Market Data available to ERA Members
Physical Music (Official Charts) CD Vinyl	**Physical TV and Film (Official Charts)** DVD BluRay 4K	**Physical Games (GfK & GSD)** Console software Handheld software Digital at store
Digital Music (Official Charts) Downloads Subscription streams Ad funded streams Music video streams	**Digital Film (Official Charts)** EST downloads VOD rental	**Digital Games (GSD)** Full game downloads
	Digital Film & TV (Futuresource and Omdia) SVoD Pay TV EST VOD	**Digital Games (Omdia)** DLC Downloads Mobile Subscriptions Casual and Social
		Hardware (GfK) Consoles Peripherals and accessories

CONSUMER INSIGHT

FLY RESEARCH TRACKER

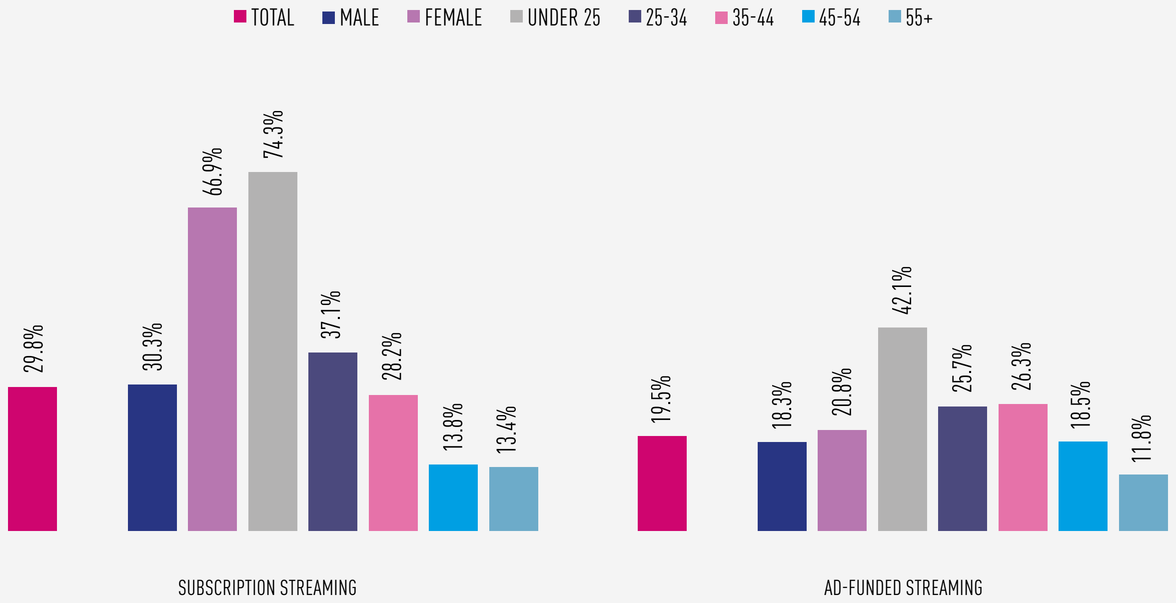
It's not enough to just understand what is selling in the market, our members also need to understand what is driving consumer behaviours and to that end ERA provide a Consumer tracking service to its members in conjunction with Fly Research, which is now in its 10th Year, allowing us to accurately track changes in consumer behaviours and predict the changes that will likely occur in the market.

The Fly panel consists of approximately 2,000 consumers which are nationally representative and the panel is surveyed twice a year to track device choices and behaviour across music video and games.

In addition, we ask bespoke questions on a quarterly basis on a range of topics of interest to ERA members.

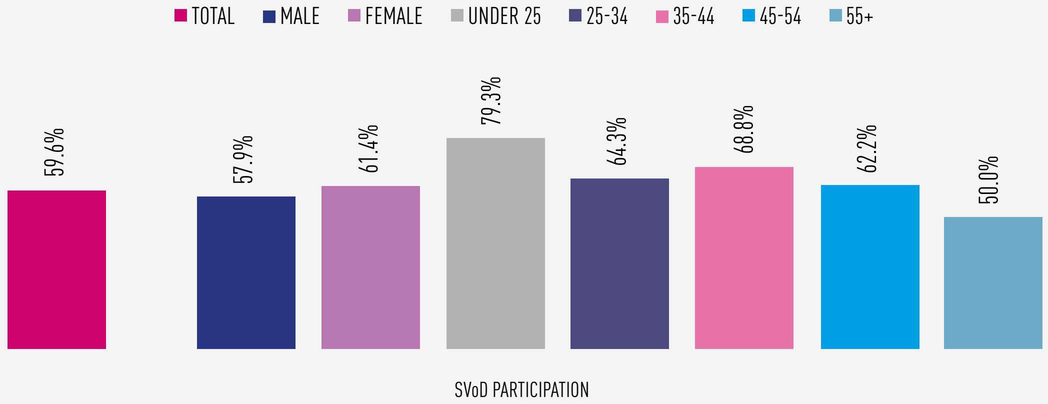
The Fly service covers hardware purchasing, entertainment purchasing, spend on entertainment, service use, stores visited etc.

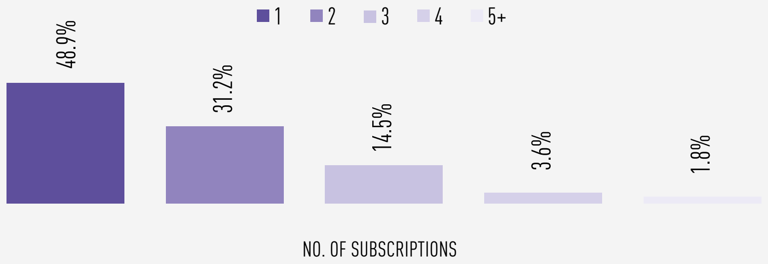
Paid-For Music Subscribers – May 2022



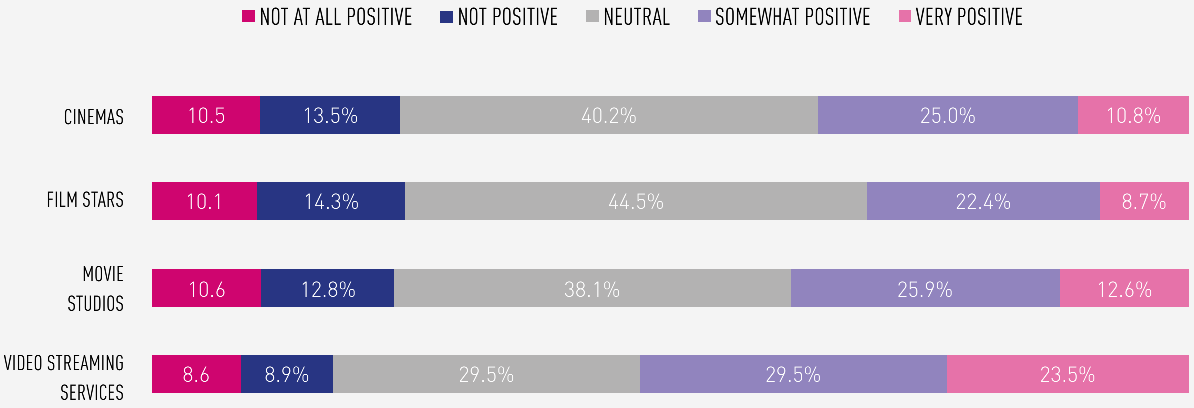
Note:
Subscription Streaming
Paid Single License
Paid Family License
Student Discount License
Bundled with Other Paid-For Service

SVoD Subscribers – May 2022



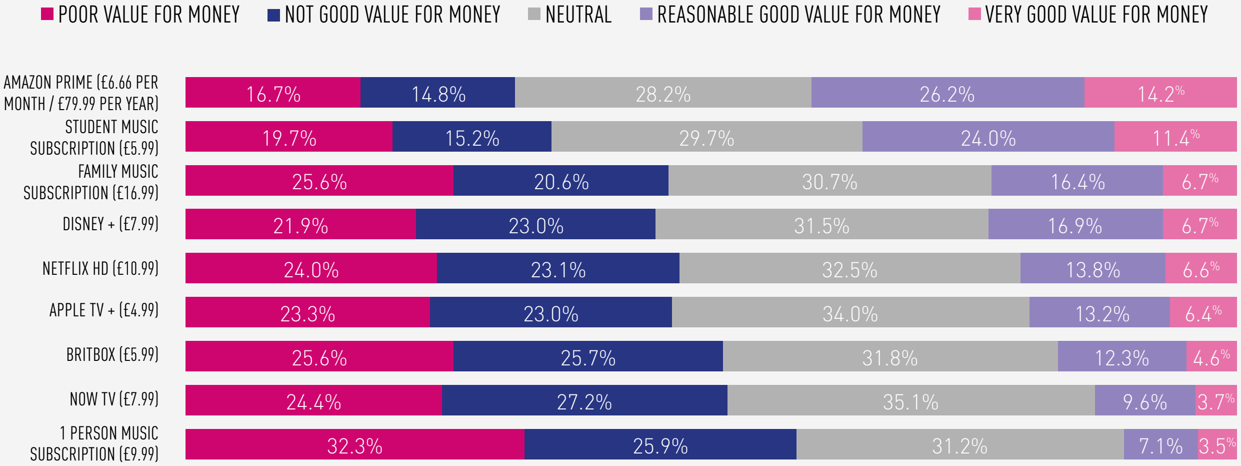


How positively or negatively do you feel about the following groups:



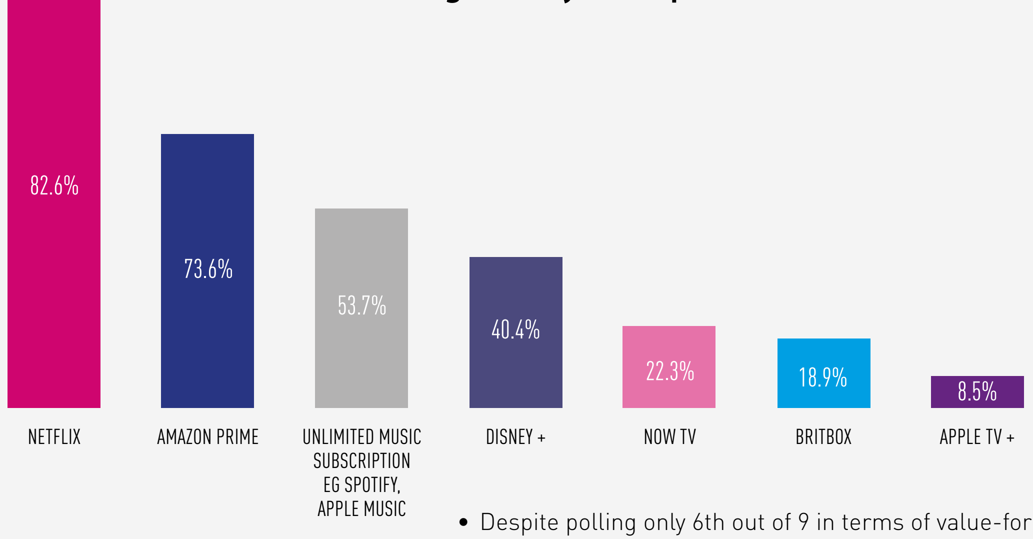
- 'Video Streaming Services' enjoy the highest approval levels amongst the panel with over 53% feeling positive about them
- 'Movie Studios' and 'Cinemas' attract similar positive ratings on 38.5% and 35.8% respectively

On a scale of 1 to 5 1 being poor value for money and 5 being very good value for money please rate the following monthly subscription products



- Amazon Prime (free delivery, plus music and video) polled the highest value-for-money ratings with over 40% saying the service was either reasonably good or very good value.
- Music subscriptions polarised opinion depending on the tier responded to – 35.4% stated the '£5.99 Student' tier was reasonably or very good VFM, while only 10.6% considered the standard '1 Person' tier good value for money

If you could only have 3 subscriptions, which of the following would you keep?



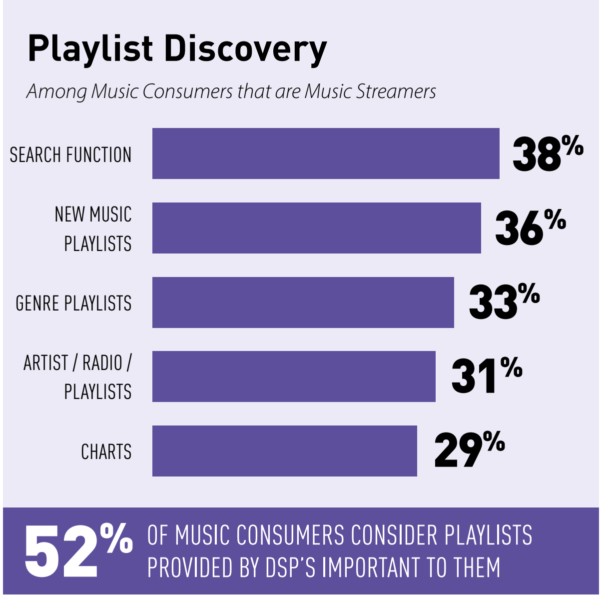
- Despite polling only 6th out of 9 in terms of value-for-money, Netflix tops the list of those services respondents would keep if they could only keep 3.

CONSUMER INSIGHT

LUMINATE DASHBOARD

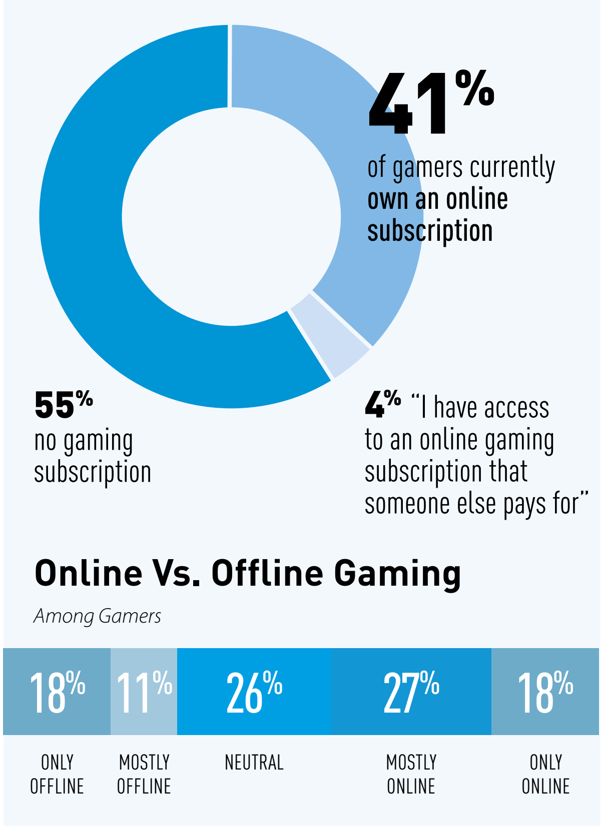
Tracking consumer behaviours in such a fast paced environment as entertainment is extremely challenging and requires constant re-evaluation, which is why in 2022 ERA launched a second service to its members in conjunction with Luminate to track newer forms of entertainment consumption.

The new service again has a sample size of around 2,000 people and covers the following areas: Music, Film, TV, Gaming, Podcasts, Radio, Sport, NFTs, Audiobooks, Devices, Merch, Crypto, the Metaverse etc and the data provided in an interactive dashboard form which helps members understand questions around trends in these areas and can be broken down by demographics, genre preferences, service use etc.


Playlist Discovery

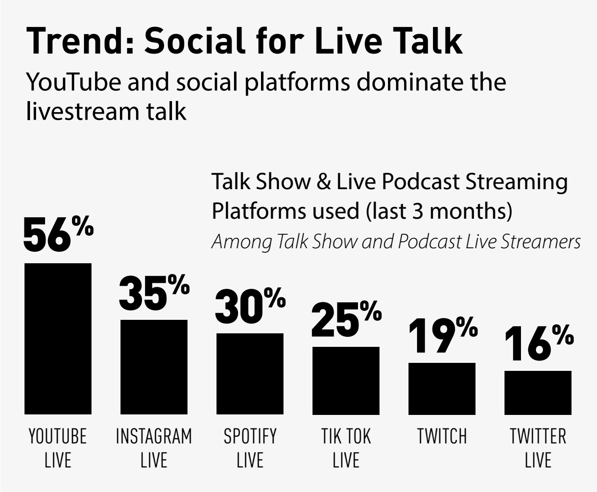
Among Music Consumers that are Music Streamers

52% OF MUSIC CONSUMERS CONSIDER PLAYLISTS PROVIDED BY DSP'S IMPORTANT TO THEM



Online Vs. Offline Gaming

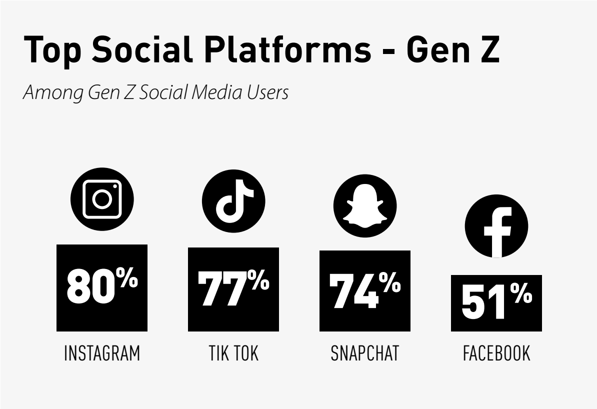
Among Gamers


Trend: Social for Live Talk

YouTube and social platforms dominate the livestream talk

Talk Show & Live Podcast Streaming Platforms used (last 3 months)

Among Talk Show and Podcast Live Streamers


Top Social Platforms - Gen Z

Among Gen Z Social Media Users

INDIE CONFERENCE

The second ERA Indie Conference was held on the 23rd January and we welcomed more than 200 attendees. We heard from employment law specialists, sustainable experts, the international RSD organiser, labels and distributors. The day was rounded off by an accoustic performance from The Lathums courtesy of Universal.

era
INDEPENDENT
CONFERENCE
23 JANUARY 2023
11AM – 6PM
COIN STREET CENTRE, 108 STAMFORD STREET,
LONDON SE1 9NH

PROGRAMME

11.00
Welcome from ERA and our Sponsors

11.10
Market place selling - iHaveIt

11.40
Top Employment Law Tips – Citation

12.00
Sustainability for Indie retailers - BRC

12.15
Record Store Day Global Co-ordinator –
Michael Kurtz

12.30
The Official Charts – Chris Austin

12.45
SoundDrop

1.00 – 2.00 LUNCH

2.00
Label Panel – The

2.25
The Distribution

2.40 – 5.30
Speed dating (m
stands etc) (Boc

5.30 Close

6.00
Guest Perforr

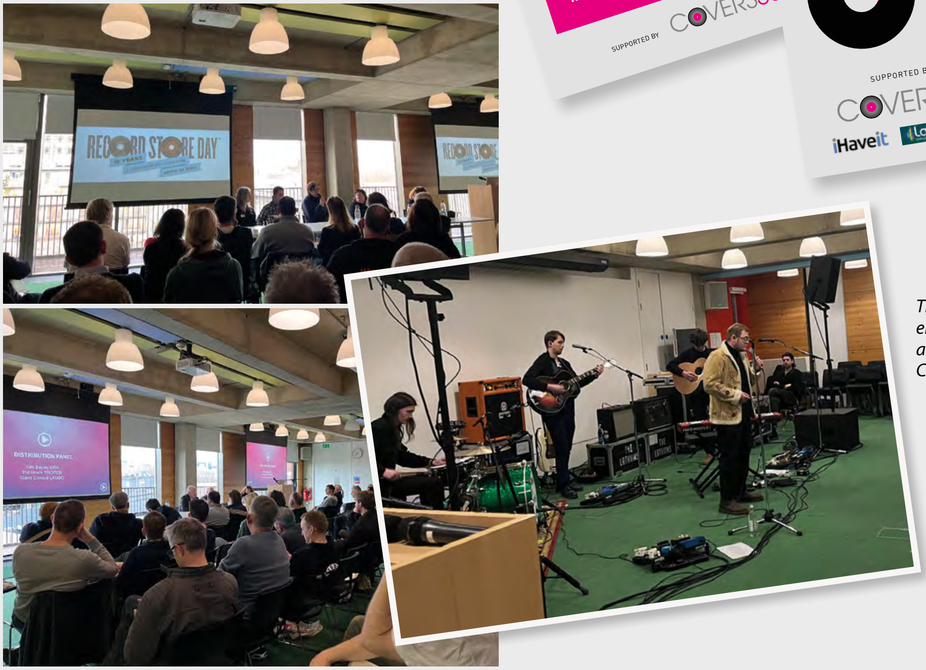
To book a ticket go to:
members.eraltd.org/events/indeper
or contact **beth@eraltd.c**

SUPPORTED BY

era
INDEPENDENT
CONFERENCE

A DAY WHERE INDIE SHOPS, SALES REPS AND RECORD SHOP SUPPLIERS COME TOGETHER TO NETWORK AND LEARN FROM EACH OTHER AND A CHANCE TO HEAR FROM A RANGE OF GUEST SPEAKERS WITH TOP TIPS FOR INDIE RECORD SHOPS.

SUPPORTED BY:



The Lathums entertain the audience at the Indie Conference 2023

2022 saw Record Store Day celebrate its 15th anniversary – and the ERA team pulled out all the stops to make it one to remember!

Despite the backdrop of the pandemic still looming over us, it didn't stop record shops from enjoying another triumphant year. In fact, despite all odds, more record shops took part in RSD 2022 than ever before, with a new record shop opening in the UK every three weeks.

Alongside the series of 400+ bumper releases, RSD celebrated its 15 year milestone by enlisting its first global ambassador with none other than superstar artist Taylor Swift. With the event having now recruited a new generation of music lovers through its doors, Swift was the perfect artist to truly fly the flag for record shop culture. The announcement of Taylor Swift was picked up by media worldwide, including CNN, NME, Metro, Daily Telegraph, BBC and many others as well as taking social media by a storm.

RSD embraced TikTok for the first time with an official partnership which included promoted playlisting on TikTok Sounds and boosted RSD content across the platform - this generated an impressive 30m views over the weekend and tapped into a music loving gen z audience.

On top of this, our official RSD beer with Meantime Brewing Company returned. The IPA was stocked in participating record shops and the partnership culminated in a special live music festival at the Greenwich brewery, headlined by Samm Hensahw and Hak Baker and attending by over 500 people

One of our most treasured partnerships also continued as BBC 6Music were finally able to reinstate their live outside broadcast. Gilles Peterson and his team decamped their Saturday show and presented live from Intense Records in Essex as part of a RSD special weekend of features and coverage

And finally, our brilliant YouTube and Instagram series "Behind the Counter", in partnership with Bowers & Wilkins and Classic Album Sundays, returned telling the weird and wonderful stories from record store owners up and down the UK. The digital campaign has to date enjoyed over 1.7m views

The in-house PR team worked round the clock to deliver these initiatives and enjoyed another great year of press, with coverage including:

- **700+ online articles reaching over 160m people.**
- **50+ print pieces with an incredible regional reach, reaching over 10m people.**
- **And an amazing broadcast partnership across the BBC networks reaching over 35m people.**

2022

RECORD STOR

The results speak for themselves as RSD delivered yet another huge boost to the vinyl market with an 80% uplift in weekly vinyl sales and 107% uplift in vinyl value.

As always, a special thank you to the record labels who contribute their artists and releases to the special product list and to our partners who bring fun and exciting initiatives to the RSD campaign.

And lastly, a huge well done to all of the shops who despite another year of turbulence pulled off a fantastic RSD campaign for their customers to remember.

THE RECORD CLUB

Record Store Day, National Album Day and The Official Charts came together in 2020 to create The Record Club – a bi-weekly live broadcast presented by BBC Music's Jess Iszatt, which takes a deep look into new releases with the artist themselves to help support the independent community.

Although initially created to help with record shop mail orders and to support new releases during the pandemic, we celebrated over a quarter of a million views within our first year.

The Record Club has continued to grow in 2022 with a total of 80,000 live views and reaching over 550,000 people on social media.

This year, The Record Club has played host to 25 guests with 10 Top 10 Albums and 2 Number 1 Albums between them. Some of our 2022 guests have included Blondie, Miles Kane, Nilufer Yanya, Blossoms, Nova Twins, Katy J Pearson, The Big Moon, Kokoroko Easy Life, Ezra Collective and more.

Each episode also gives a nod to one of our special independent record shops with a featured question specifically from the shop staff members themselves.

The Record Club is proud to be continuing our partnership with Bowers & Wilkins and is more committed than ever to supporting new music, physical releases, and record shops as we move into 2023.

the RECORD CLUB
IN ASSOCIATION WITH
Bowers & Wilkins

ORDER. LISTEN. WATCH.

the RECORD CLUB
IN ASSOCIATION WITH
Bowers & Wilkins

WED 20 APRIL - 6.30PM BST
FACEBOOK LIVE

BLONDIE

RECORD STORE DAY · album day · Official Charts.com

@RSDAYUK · @ALBUMDAYUK · @OFFICIALCHARTS

2022

- **22 episodes - 22 guests**
- **10 Top 10 albums including 2 Number 1 albums.**
- **10 Specialist Chart Albums with all of these reaching Top 10 in their respective chart - 7 Number 1's.**
- **Total stream views:**
  91,477
- **Total social impressions:**
  590,918
- **Total social video views:**
  209,125

NATIONAL ALBUM DAY

National Album Day returned for its fifth edition in October as we honoured the album format and celebrated debut albums.

In collaboration with the BPI, 2022 was the third year National Album Day welcomed a theme and an exclusive product offering for retailers under ERA's physical and digital membership.

The theme gave retailers an opportunity to celebrate the musically rich and diverse debut albums that influence and inspire today. Ranging decades and genres, National Album Day released limited edition products exclusively to ERA members including Alt-J, Chase & Status, Jamiroquai, Jennifer Lopez, Mariah Carey, The National, Stereophonics, Wu-Tang Clan, and many more.

While first and foremost a cultural event, the commercial results speak for themselves as the titles claimed several places in the Official Albums Chart Top 20.

Several exciting ambassadors spearhead the media coverage including Sam Ryder, KSI, Franz Ferdinand, The Mysterines, The Staves, Jake Bugg, Pip Millet and India Arkin.

National Album Day activities were supported by official BBC coverage across TV, radio and online including BBC Breakfast, The One Show, Radio 2's Official Debut Albums Chart, BBC iPlayer, and BBC local radio networks across the UK.

Outside of the BBC, coverage also reached to Metro, NME, The Sun, Good Morning Britain, Radio X, Music Week and more.

In physical retail, over 100 HMVs and 150 indie record stores joined in with in-store racking, window displays, events, performances, bespoke newsletters, and social media posts.

NAD Ambassador India Arkin

In digital retail, Amazon and DSPs Spotify, YouTube Music, Qobuz and Napster took part with homepage takeovers, Twitch takeovers, podcast features, playlisting, editorial and social media support.

Outdoor media partners Diabolical also helped to create striking billboards across 13 locations including London, Manchester, Brighton, and Liverpool encouraging people to interact with our social campaign.

Two murals were commissioned at 81 Renshaw in Liverpool and Avalanche Records in Edinburgh to celebrate iconic debut albums from the local area.

This year's National Album Day was a brilliant opportunity for cross-industry collaborations and illustrated just what we can achieve when suppliers and the ERA membership come together.

ERA looks forward to working on the next campaign with all members in 2023!

AGM

This year's AGM welcomed Julia Killer from Meta as our keynote speaker, who inspired and excited members by talking us through the future of the Metaverse. Killer explored the opportunities and changes this will bring to the future of retail and entertainment and how organisations can begin to engage in the Metaverse in 2022 and beyond. This was followed by an introduction to Luminate and the impressive Entertainment 365 research dashboard now available to ERA members. The AGM was once again held at the Everyman Theatre in King's Cross and enjoyed a brilliant turnout from our members across music, video and games.

Kim Bayley opening proceedings

Awarded to Kim Bayley for 20 years at ERA

2023 CALENDAR

March

10-19	SXSW (USA)
12	Oscars (USA)
19-22	Musexpo (USA)
29 – 9 April	London Games Festival

April

22	Record Store Day

May

10-13	The Great Escape
15-18	Music Biz (USA)
24	Music Week Awards

June

3-4	UK Games Expo
13-16	E3 Expo (USA)
TBC	Midem (France)

July

11-13	Develop: Brighton
12	Alliance Summer Reception

August

23-27	Gamescon

September

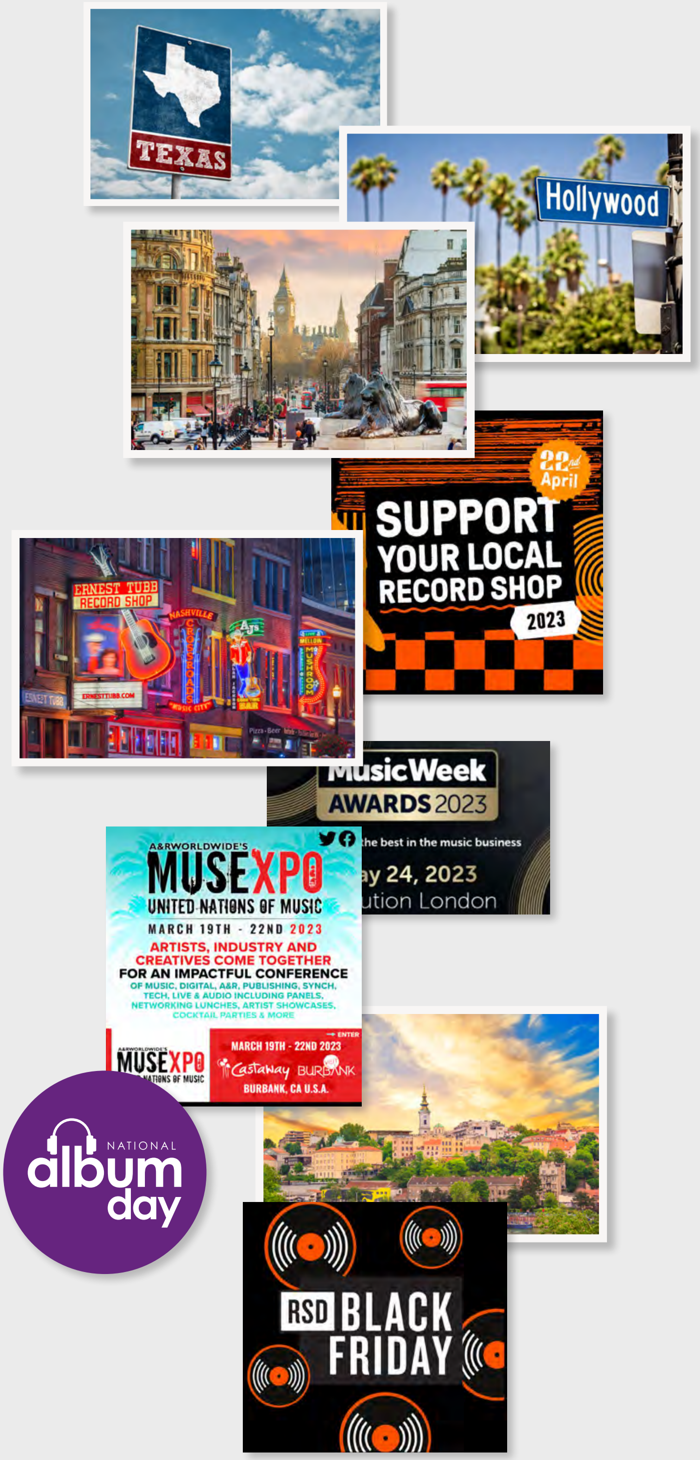
TBC	Mercury Music Prize
13	ERA AGM

October

14	National Album Day

November

24	Record Store Day Black Friday

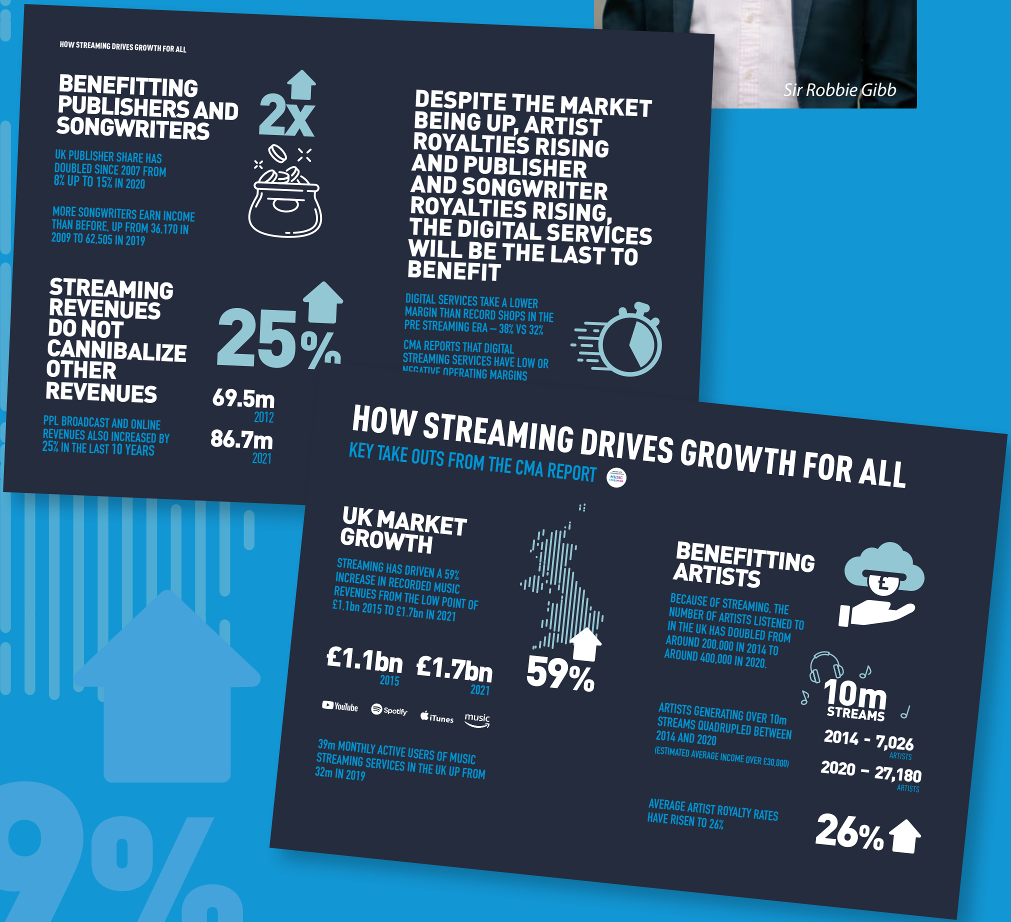


POLICY AND ADVOCACY

This year ERA welcomed Sir Robbie Gibb as a consultant to help steer our Government affairs function. Our own agenda was dominated by the DCMS streaming enquiry as well as the conclusion of the Competition and Markets Enquiry.

A summary of the key take outs from the final CMA report is shown below.

Sir Robbie Gibb



HOW STREAMING DRIVES GROWTH FOR ALL

BENEFITTING PUBLISHERS AND SONGWRITERS

2x

UK PUBLISHER SHARE HAS DOUBLED SINCE 2007 FROM 8% UP TO 15% IN 2020

MORE SONGWRITERS EARN INCOME THAN BEFORE, UP FROM 36,170 IN 2009 TO 62,505 IN 2019

STREAMING REVENUES DO NOT CANNIBALIZE OTHER REVENUES

25%

69.5m
2012

86.7m
2021

PPL BROADCAST AND ONLINE REVENUES ALSO INCREASED BY 25% IN THE LAST 10 YEARS

DESPITE THE MARKET BEING UP, ARTIST ROYALTIES RISING AND PUBLISHER AND SONGWRITER ROYALTIES RISING, THE DIGITAL SERVICES WILL BE THE LAST TO BENEFIT

DIGITAL SERVICES TAKE A LOWER MARGIN THAN RECORD SHOPS IN THE PRE STREAMING ERA – 38% VS 32%

CMA REPORTS THAT DIGITAL STREAMING SERVICES HAVE LOW OR NEGATIVE OPERATING MARGINS

HOW STREAMING DRIVES GROWTH FOR ALL

KEY TAKE OUTS FROM THE CMA REPORT

UK MARKET GROWTH

STREAMING HAS DRIVEN A 59% INCREASE IN RECORDED MUSIC REVENUES FROM THE LOW POINT OF £1.1bn 2015 TO £1.7bn IN 2021

£1.1bn
2015

£1.7bn
2021

59%

39m MONTHLY ACTIVE USERS OF MUSIC STREAMING SERVICES IN THE UK UP FROM 32m IN 2019

BENEFITTING ARTISTS

BECAUSE OF STREAMING, THE NUMBER OF ARTISTS LISTENED TO IN THE UK HAS DOUBLED FROM AROUND 200,000 IN 2014 TO AROUND 400,000 IN 2020.

ARTISTS GENERATING OVER 10m STREAMS QUADRUPLED BETWEEN 2014 AND 2020
(ESTIMATED AVERAGE INCOME OVER £30,000)

10m STREAMS
2014 - 7,026 ARTISTS
2020 – 27,180 ARTISTS

AVERAGE ARTIST ROYALTY RATES HAVE RISEN TO 26%

26%

INDEPENDENT RETAILERS CONFEDERATION

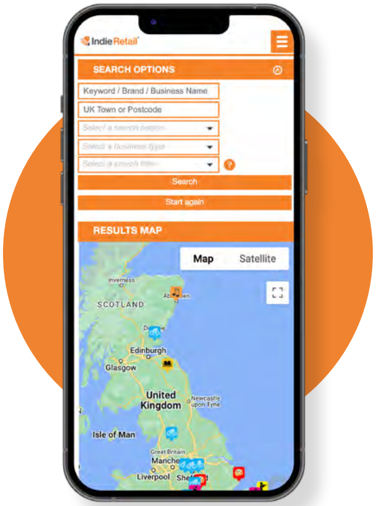
One of ERA's key partners in the independent retail space is the Independent Retailers Federation, which provides a lobbying platform for like minded trade bodies in the independent retail space. Much of the focus in 2022 was spent looking at ways to support small businesses in the current economic environment – post Brexit, rising energy costs etc.

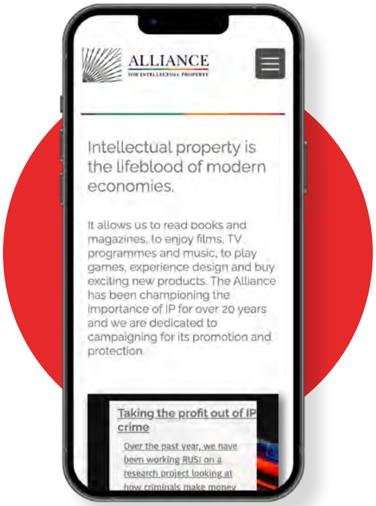
THE ALLIANCE FOR IP

ERA has been a member of the Alliance for IP since its inception in 1998. The Alliance is a UK based coalition of 20 organisations representing businesses and creators from the worlds of audio visual, music, toy and games, sports, publishing and many more. The Alliance campaigns to ensure that consumers are able to enjoy the content and products they love whilst also campaigning for the value of IP rights in the UK. During 2022 the Alliance once again hosted a successful Summer Reception and provided input into a number of key policy areas including Design Rights, Copyright, Online Harms and International Trade.

THE INDUSTRY TRUST

The Industry Trust is another of ERA's key lobbying partners who address the ongoing challenges of film and TV copyright infringement by inspiring audiences to consume content via legitimate sources. Their Moments Worth Paying For campaign is now well established and drives consumers to respective the value of the creative content they consume by watching only on legal and genuine sites including ERA member digital services and / or legitimate physical formats. The Trust also provides insight into copyright infringement as well as working on initiatives with organisations such as Crimestoppers to educate infringers.



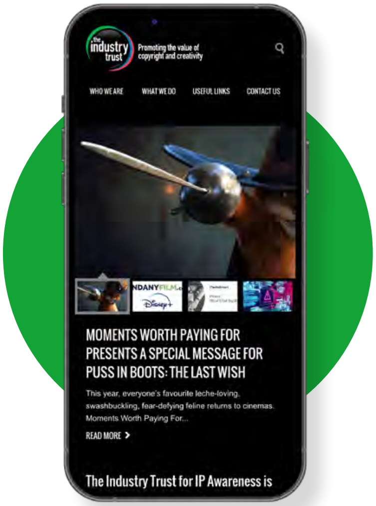


Intellectual property is the lifeblood of modern economies.

It allows us to read books and magazines, to enjoy films, TV programmes and music, to play games, experience design and buy exciting new products. The Alliance has been championing the importance of IP for over 20 years and we are dedicated to campaigning for its promotion and protection.

Taking the profit out of IP crime

Over the past year, we have been working RUSI on a research project looking at how criminals make money



MOMENTS WORTH PAYING FOR PRESENTS A SPECIAL MESSAGE FOR PUSS IN BOOTS: THE LAST WISH

This year, everyone's favourite leche-loving, swashbuckling, fear-defying feline returns to cinemas. Moments Worth Paying For...

The Industry Trust for IP Awareness is

2022-23 BOARD MEMBERS

EXECUTIVE BOARD

Kim Bayley
CEO ERA
Kim has been ERA's CEO for over 20 years and works alongside ERA's Chair driving ERA's strategy and oversee's ERA's work.

Ben Drury
NON EXECUTIVE CHAIR
ERA
Ben first joined the ERA board as ERA's first ever digital member in 2008. Now the MD of Yoto, he was elected as ERA's Chair in January 2023.

Drew Hill
TREASURER
Proper Distribution
Drew is Managing Director of Proper Music, having joined in 2007 from the Walt Disney Company. He runs the groups's distribution label.

Paul Firth
Amazon
Having started his career as store manager at MCV, Paul Firth spent nine years at Entertainment UK where he worked in both the music and video teams, culminating in a role as head of music. After two years at Lovefilm, he transferred to Amazon where he now heads up Amazon Music.

Phil Halliday
hmv
Phil joined HMV in June 2020 after a career spanning the media and products industries. He has been MD since that August. Since joining, he has overseen development of new category expansions.

Alan Jordan
Reflex
Alan is the owner of Reflex Records in Newcastle and Chairs the Independent Retailers within ERA.

Tom Connaughton
Spotify
Tom is Spotify's UK Managing Director and leads the growth of Spotify's UK business, including driving its content strategy, artist partnerships, editorial and artist marketing. He has over 17 years' experience in the music industry.

Dan Chalmers
YouTube / Google
Dan is Head of Music at YouTube (EMEA) and has over 20 years of music industry experience having previously been President of ADA and in charge of East West and Rhino Records at Warner.

THE ERA BOARD IS THE RULING BODY OF THE ENTERTAINMENT RETAILERS ASSOCIATION. IT COMPRISES 18 TO 20 COMPANY REPRESENTATIVES ELECTED BY THE MEMBERSHIP WITH SIX POSITIONS RESERVED FOR INDEPENDENT MEMBERS. THE BOARD IS COMPLEMENTED BY AN EXECUTIVE BOARD DRAWN FROM THE OVERALL BOARD WHICH IS RESPONSIBLE FOR THE STRATEGIC DIRECTION OF THE ORGANISATION.

OTHER BOARD MEMBERS

Samantha Sawyer
7digital

Scott Gamble
Crash Records

Ashlie Green
David's Music

Nick Arran
GAME

Will Spencer
(resigned Dec 2022)
MusicGlue

Joe Vesayaporn
(appointed Jan 2023)
MusicGlue

Brad Aspess
Rarewaves

Natasha Youngs
Resident

Paul Newton
Sky Store

Anne-Marie Chirema
(resigned Dec 2022)
SoundCloud

Emmy Lovell
(appointed Jan 2023)
SoundCloud

Markus Bhatia
The Hut

Parick Clifton
The Vinyl Factory

Tony Boothroyd
Vinyl Tap

Louise Jackson
Wax & Beans

ERA MEMBERS

101 Collectors Records	Farnham
303 Records	Ilton
7digital Limited	London
81 Renshaw	Liverpool
A & R Music & Film	Ashbrook
A Slice Of Vinyl	Gosport
Action Records	Preston
Adrians	Wickford
Amazon	London
Analogue October Records	Chichester
Andy's Records	Ceredigion
Applestump Records	Nantwich
Arrow Film Distributors	Shenley
ASDA Stores Ltd	Leeds
Assai Records	Dundee
Astonishing Sounds	Burnley
Avalanche Records	Edinburgh
B Side Records	Newbury
Back To Mono Records	Lincoln
Badlands	Cheltenham
Banquet Records	Surrey
Beatdown Records Ltd	Newcastle Upon Tyne
Bella Union Vinyl Shop	Brighton
Bending Sound	Bangor
Beyond The Download	Wokingham
Beyond Vinyl	Newcastle Upon Tyne
Big Red Tent	London
Black Circle Records	Leighton Buzzard
Black Slab	Teesside
Black Star Records	Lyndhurst
Blackest Rainbow Ltd T/A Bear Tree Records	Sheffield
Blast Music and Comics	Braintree
Blood Records	Towcester
Bobs Records	Whittlesey
Boiler Room Records	Poole
Book Stop	Tavistock
Bug Vinyl	Beverley
Café Luna	Baldock
Capsule Records	Hove
Castle Sounds	Christchurch
Cavern Music Services	Richmond
CentreSoft	Birmingham
Chalky's (Belushi Ltd T/A)	Banbury
Chameleon	Edinburgh
Chapter22 Roots and Records	Bath
Chepstow Records	Chepstow
Choons	Bangor
Clocktower Music	Bridport
Convoy Records	Frodsham
Crash Records	Leeds
Crazy Beat Records	Upminster
Creekside Vinyl	Faversham
Dark Earth Records	Wallasey
Dash The Henge Store	London
David's Music	Letchworth
Deezer	London
Defend Vinyl	Liverpool
Derricks Music	Swansea
Diverse Music	Newport
Domino Recording Company	London
Dreamhouse Records	London
Earworm Records	York
Eclipse Records	Walsall
Eel Pie Records	Twickenham
Elsewhere	Margate
Empire Records	St Albans
Europa Music	Stirling
Even Flow	Tunbridge Wells
Fairhill Records	Ballymena
Fish Records	Staffordshire
Five Rise Records	Bingley
Five's Records	Leigh on Sea
Flashback Records Limited	Islington
Forest Vinyl	Cinderford
FortyFive Vinyl Café	York
Frank Harvey Hi-Fi Excellence	Coventry
Friendly Records	Bedminster
Game	Basingstoke
* Gardners Books	Eastbourne
Gatefield Sounds	Whitstable
Global Groove	Hanley
Google	London
Grind And Groove Records	Keighley
Grooves Records	Orkney
Harbour Records Emsworth	Emsworth
Head Records	Leamington Spa
Heathen Chemistry Records	Fareham
Henry's Records	Burton-on-Trent
Hey Joe	Brentwood
HMV	London
Honest Jons	London
Hundred Records	Romsey
iHaveit UK Ltd	Swindon
Intense Records	Chelmsford
Isotope Music Ltd	Isleworth
It's For You Vinyl & Vintage	Wolverhampton
Jacaranda Records	Liverpool
Jam	Falmouth
Jazzed	London
JG Windows	Newcastle Upon Tyne
Jumbo Records	Leeds
Just Dropped In	Coventry
Kaleidoscope Records	St. Helens
Keep Audio Co	Launceston
Keymailrecords	Camberley
Lasgo Chrysalis	London
Left For Dead	Shrewsbury
Level Crossing Records	London
Life Of Vinyl	Thornaby
Lion Coffee & Records	London
Lion Vibes	London
Loafers Vinyl	Halifax
Logo Fiasco Records	Carshalton
Longwell Records	Keynsham
Lost In Vinyl	Cambridge
Lovemusic	Glasgow
Low Port Music	Linlithgow
Lucky's Record Bar	Redruth
Maidinvinyl	Aberdeen
Malcolm's Musicland	Chorley
Marketplace Solutions Worldwide LLP	Morley
Martian Central	Exmouth
Mixed Up Records	Glasgow
Mo' Fidelity	Montrose
Monorail Music	Glasgow
Morrisons	Bradford
Mudshark Records	Bangor
Muse Music & Love Café	Hebden Bridge
Museum Vinyl	St Austell
Music and Goods Exchange Ltd	London
Music From Big Blue	Glasgow
Music Glue	London
Music Junkee	Sheffield
Music Magpie	Macclesfield
Music Mania	Clacton-on-Sea
Music Mania (Hanley)	Stoke-on-Trent
Music Nostalgia	Truro
Music's Not Dead Ltd	Bexhill On Sea
Napster Luxembourg Sarl	Luxembourg
Number One Records	Larne
Off The Beaten Tracks	Louth
Olaf's Record Store	Sevenoaks
Online Commerce Ltd	Upper Rissington

Opus 13 Ltd	Bristol
Out Of The Attic Music	Hull
Overdraft Records	Southampton
P & C Music	Harrogate
Pacemaker Music AB	Sweden
Pandemonium	Bournemouth
Peckham Soul	London
Phoenix Sound	Newton Abbot
Phonica Records	London
Piccadilly Records	Manchester
Pie & Vinyl	Southsea
Polar Bear	Kings Heath
Presto Classical	Leamington Spa
Probe Records	Liverpool
Proper Music Distribution	Dartford
Pure Vinyl Records	London
Qobuz	France
Queen Street Records	Market Drayton
Quicksilver Music	Southport
Radio On	Bristol
Rakuten	London
Ranger Computers	Duston
Rarekind Records	Brighton
Rarewaves	Chiswick
Raves From The Grave	Frome
Record Collector	Broomhill
Record Corner	Godalming
Record Culture	Stourbridge
Record Revivals	Scarborough
Record Trader	Altrincham
Red Robin Records (Vinyl Café)	Aberdeen
Reflex	Newcastle
Reflex Folio	Southsea
Reggie's Retro Record Store	Ventnor
Released Records	Leeds
Relevant Records	Cambridge
Replay Records	Grimsby
Resident	Brighton
Revived Vinyl Records	Northwich
Revo Records	Halifax
Revolution Records	Walsall
Rival Records	Hatherleigh
Roan Records	Teddington
Rock Box Records Ltd	Camberley
Rough Trade	London
RPM Music	Newcastle Upon Tyne
S.T. Records	Dudley
Sable Starr Records	Belfast
Sainsburys Argos	Milton Keynes
Sandbag Ltd	Reading
Saxosoul Records	Darlington
Seismic Records	Leamington Spa
Serenade	Beaconsfield
Shaks Stax of Wax	Kingston Upon Thames
Sister Ray	London
Sky Store	Isleworth
Slide Record Shop	Bedford
Slow Progress	Edinburgh
Some Great Reward	Glasgow
Soul Brother Records	London
Sound It Out Records	Stockton on Tees
Sound Knowledge	Marlborough
Sound Records (IOM)	Douglas
Sound Records (Stroud)	Stroud
SoundCloud	London
Sounds Of The Universe	London
South Record Shop	Southend-on-Sea
Specialist Subject Records	Bristol
Spillers Records	Cardiff
Spin The Black Circle	Worcester
Spinning Discs	Sheffield
Spiral Classics	Loughborough
Spotify	London
Square Records	Wimborne
Stewarts Music Shop	Co Tyrone
Sticky Black Tarmac	Leigh
Strummer Room Records	Banbury
Stylus Records	Lichfield
Tallbird Records	Chesterfield
Tangled Parrot	Carmarthen
Tesco	Welwyn Garden City
The Beat and Track	Sherborne
The Chelsea Gamer	London
The Drift Record Shop	Totnes
The Electric Church	Winsford
The Hut	Northwich
The Left Legged Pineapple	Loughborough
The LP Café	Watford
The Music Store & Musical Exchanges (Ceritech)	Cinderford
The Musical Box	Liverpool
The Orpington	Orpington
The Record Café	Bradford
The Record Shop Ltd	Amersham
The Record Store	Ashford
The Turntable Coffee & Vinyl	Huddersfield
The Vault Collective	Ebbw Vale
The Vinyl Factory	London
The Vinyl Whistle Ltd	Leeds
Thirteen Records	Dundee
Thorne Records	Edinburgh
TNT Records	Cumbria
To Have and to Hold Records	Tewkesbury
Tough Love St Leonards	St Leonards-on-sea
Townsend Records	Great Harwood
Trading Post	Stroud
Truck/Rapture	Oxford
Underground Solushn	Edinburgh
Union Music Store	Lewes
Universal Music UK eCommerce	London
Up North Records	Chester
Ventnor Exchange	Ventnor
Venus Vinyl	Norwich
Vinilo Record Store	Southampton
Vintage & Vinyl	Folkestone
Vinyl Attraction	Newark
Vinyl Café	Carlisle
Vinyl Eddie	York
Vinyl Exchange	Manchester
Vinyl Frontier	Eastbourne
Vinyl Guru	Newcastle Upon Tyne
Vinyl Hunter	Suffolk
Vinyl Sounds Good	Bangor
Vinyl Tap	Huddersfield
Vinyl Underground	Northampton
Vinyl Van	Dorchester
Vinyl Vaughan	Alderney
VinylBox	London
Vinylstore Jr	Canterbury
Virgin Media Store	Hook
VOD Music	Mold
VoxBox Music Ltd	Edinburgh
Wax and Beans Ltd	Bury
Wax At Moorgate	Sheffield
WH Smith PLC	Swindon
What Records	Burton Hastings
When Spaceships Appear	London
Wilderness Record Store	Manchester
Winyl	Manningtree
World Of Echo	London
Wrecking Ball Music and Books	Hull
X Records	Bolton

USEFUL ADDRESSES

AIM - The Association of Independent Music
PO Box 76406
London W5 9RP
Tel: 020 4515 7056
www.aim.org.uk

Alliance for IP
c/o The Publishers Association
1st Floor, 50 Southwark Street
London SE1 1UN
Tel: 020 7618 9105 (press)
Tel: 020 7803 1324
www.allianceforip.co.uk

BBFC - British Board of Film Classification
3 Soho Square London
W1D 3HD
Tel: 020 7440 1570
www.bbfc.co.uk

BASE - British Association for Screen Entertainment
C/O Harmer Slater
Salatin House 19 Cedar Road,
Sutton Surrey SM2 5DA
Tel: 020 7440 0382
www.baseorg.uk

BPI - British Phonographic Industry
27 Old Gloucester Street
London WC1N 3AX
Tel: 020 7803 1300
www.bpi.co.uk

The BRIT School
60 The Crescent Croydon
CR0 2HN
Tel: 020 8665 5242
www.brit.croydon.sch.uk

DCMS - Department for Digital Culture Media and Sport
100 Parliament Street
London SW1A 2BQ
Tel: 020 7211 6000
www.culture.gov.uk

FACT - The Federation Against Copyright Theft
4th Floor Regal House
70 London Road
Twickenham TW1 3QS
Tel: 020 8891 1217
www.fact-uk.org.uk

GfK Chart Track
7th Floor
Blue Fin Building
110 Southwark Street
London SE1 0SU
Tel: 020 7890 9000
www.gfk.com

IFPI - International Federation of the Phonographic Industry
7 Air Street London
W1B 5AD
Tel: 020 7878 7900
www.ifpi.org

Industry Trust
C/O Harmer Slater
Salatin House 19 Cedar Road,
Sutton Surrey SM2 5DA
Tel: 020 7440 0382
www.industrytrust.co.uk

IRMA - Irish Recorded Music Association
63 Patrick Street Dun
Laoghaire Co Dublin Ireland
Tel: 00 353 1 280 6571
www.irma.ie

ISFE - Interactive Software Federation of Europe
15 Rue Guimard B-1040
Brussels
Tel: 0032 2 612 17 77
www.isfe.eu

Ivors Academy
1 Upper James Street
London W1F 9DE
Tel: 020 7636 2929
www.ivorsacademy.com

Julie's Bicycle
Somerset House South Wing
Strand London WC2R 1LA
Tel: 020 8746 0400
www.juliesbicycle.com

Kantar
Olympus Avenue
Tachbrook Park
Warwick CV34 6RJ
Tel: 01926 452233
www.kantar.com

MMF - Music Managers Forum Ministry of Sound
103 Gaunt Street London
SE1 6DP
Tel: 020 7700 5755
www.themmf.net

MPA - Music Publishers Association
2nd Floor Synergy House
114-118 Southampton Row
London WC1B 5AA
Tel: 0333 077 2350
www.mpaonline.org.uk

MPAA - Motion Picture Association of America
15301 Ventura Blvd Building
E Sherman Oaks
CA 91403
Tel: 001 818 995 6600
www.motionpictures.org

Mercury Prize
27 Old Gloucester Street
London WC1N 3AX
Tel: 020 3327 7111
www.mercuryprize.com

The Music Business Association
PO Box 150726 Nashville
TN 37215 US
Tel: 001 856 596 2221
www.musicbiz.org

Official Charts
6th Floor
4 Golden Square
London W1F 9HT
Tel: 020 7620 7450
www.officialcharts.com

OTTX - (formerly EMA)
11304 Chandler Blvd #6339
N. Hollywood CA 91601
Los Angeles United States
Tel: 001 818 385 1500
www.ottx.org

PPL / PRS - Phonographic Performance Limited
Mercury Place St George's
Street Leicester LE1 1QG
Tel: 0800 0720 808
www.pplprs.co.uk

UK Cinema Association
22 Golden Square London
W1F 9AD
Tel: 020 7734 9551
www.cinemauk.org.uk

UKIE - The Association of UK Interactive Entertainment
Black Bull Yard 24-28 Hatton
Wall London EC1N 8JH
Tel: 0207 534 0580
www.ukie.org.uk

UK Music
Work.Life
33 Foley Street
London W1W 7TL
Tel: 020 3713 8444
www.ukmusic.org

VSC - VSC Ratings Board
Suite 1E, Meadway Court
Rutherford Close
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www.videostandards.org.uk

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