THE BOX OFFICE 2019

CONTENTS

FACTS IN FOCUS

In 2019, UK box office revenues exceeded £1.2 billion for the fifth year in succession, while cinema admissions at 176.1 million, although lower than in 2018, where the second highest since 1970.

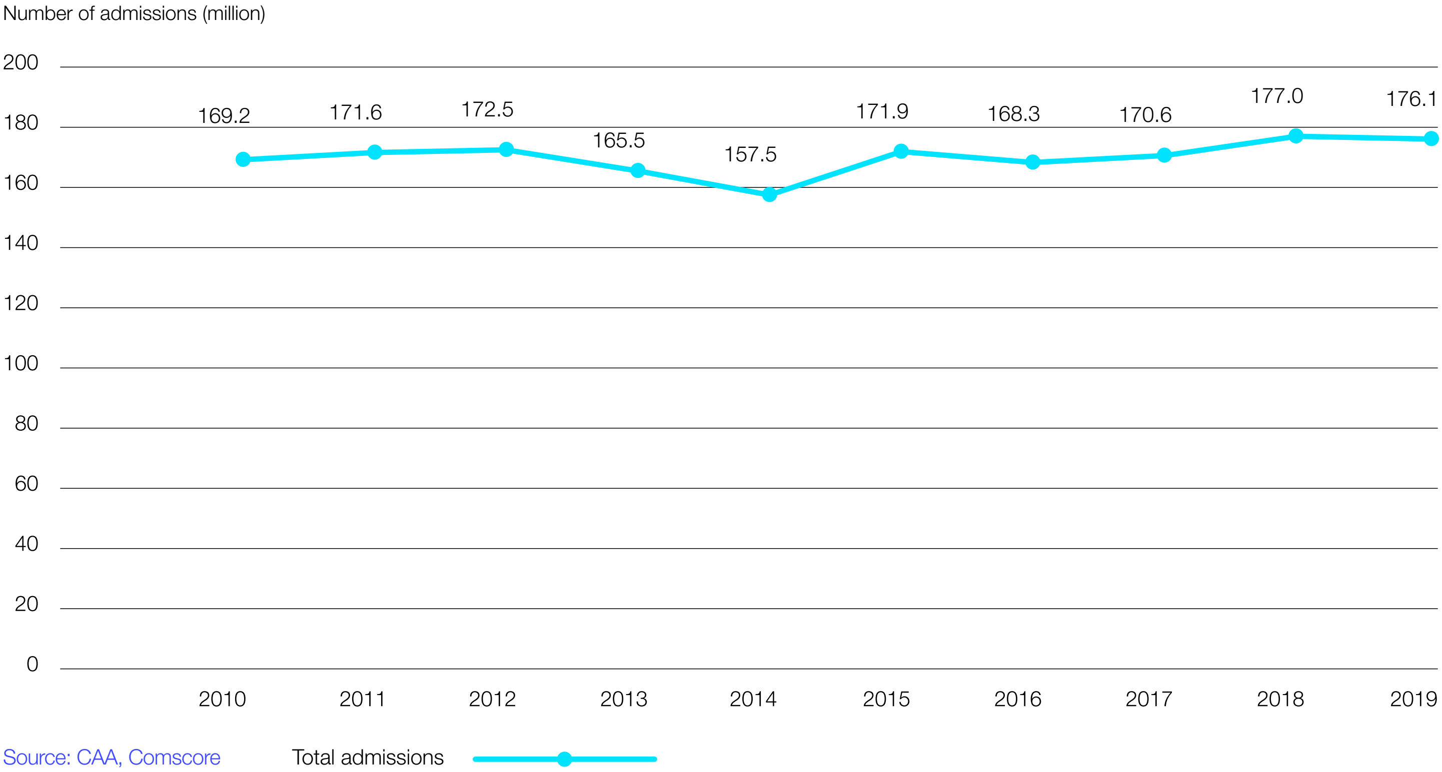
- UK cinema admissions reached 176.1 million in 2019, down 0.5% from 177 million in 2018.
- UK box office receipts in 2019 were £1.25 billion, down 2% on 2018.
- A total of 764 films were released for a week or more in the UK and Republic of Ireland.
- UK films, including co-productions, accounted for 25% of releases and 48% of the market by value.
- The box office share of UK independent films was 12.9%, down from 13.2% in 2018.
- The top 100 films earned 94% of the gross box office, the highest share of the past decade.
- Just under 10% of all films released in 2019 (72) were shown at 500 sites or over, while 30% of films (227) were shown at fewer than 10 sites.

THE BOX OFFICE 2019

ADMISSIONS

Just over 176 million cinema tickets were sold in the UK in 2019, a slight drop from the 177 million sold in 2018, but still the second highest attendance figure since 1970. These figures cap a strong decade of cinema-going in the UK with six of the 10 years between 2010 and 2019 recording annual admissions in excess of 170 million (Figure 1).

Figure 1 Annual UK cinema admissions, 2010-2019



Source: CAA, Comscore

Attendances were up in four of the five major European Union (EU) territories in 2019, with only the UK witnessing a small decline (-0.5%). Italy (+14.2%) recorded the largest increase, followed by Germany (+12.6%), France (+6.0%) and Spain (+4.8%). According to European Audiovisual Observatory estimates, total admissions in the EU increased by 5.5% in 2019 to just over 1 billion, the highest recorded figure for attendances since 2004. With the inclusion of non-EU territories, admissions in Europe also saw an overall increase, rising from 1.25 billion in 2018 to 1.31 billion. Europe's largest cinema market in terms of admissions, Russia, recorded a rise of 9.5% while Turkey saw a substantial decline in admissions (-15.6%).

Increased attendances were also seen in the majority of other major cinema markets in 2019, including the world's two largest territories in terms of admissions, China (+0.6%) and India (+8.8%). There was, however, a decline in the North American market which saw admissions fall by 4.1% compared with 2018.

Table 1 Admissions in selected global territories, 2018 and 2019 (ranked by 2019 admissions)

Territory	Admissions 2018 (million)	Admissions 2019 (million)	+/- 2018 (%)
China	1,717	1,727	0.6
India	1,463	1,592	8.8
USA and Canada	1,310	1,256	-4.1
Mexico	332	350	5.5
South Korea	216	227	4.8
Russia	200	219	9.5
France	201	213	6.0
Japan	169	195	15.2
UK	177	176	-0.5
Brazil	163	172	5.6
Indonesia	135	146	7.8
Germany	105	119	12.6
Italy	92	105	14.2
Spain	99	105	4.8
Poland	60	61	1.5
Turkey	70	59	-15.6

Source: CAA, BFI, European Audiovisual Observatory, Omdia

Notes:

Includes all global territories with more than 100 million admissions and all European territories with more than 50 million admissions.
Admissions figures for India in both 2018 and 2019 have been calculated on the basis of a different methodology than the one used for earlier editions of the Yearbook, so are not directly comparable.

Table 2 shows the breakdown of UK admissions for 2019 by month. Seven months (April, May, June, July, September, October and December) recorded higher admissions than their equivalent in 2018. June saw the year's largest increase in attendances (up 34% on 2018), while July saw the highest admissions for the entire year at 18.7 million. The top earning titles released, or earning the bulk of their total gross, in these two months included six of the year's top 20 box office earners: *Aladdin, Toy Story 4, Rocketman, The Secret Life of Pets 2, Spider-Man: Far from Home* and *The Lion King*.

Table 2 Monthly UK cinema admissions, 2018 and 2019

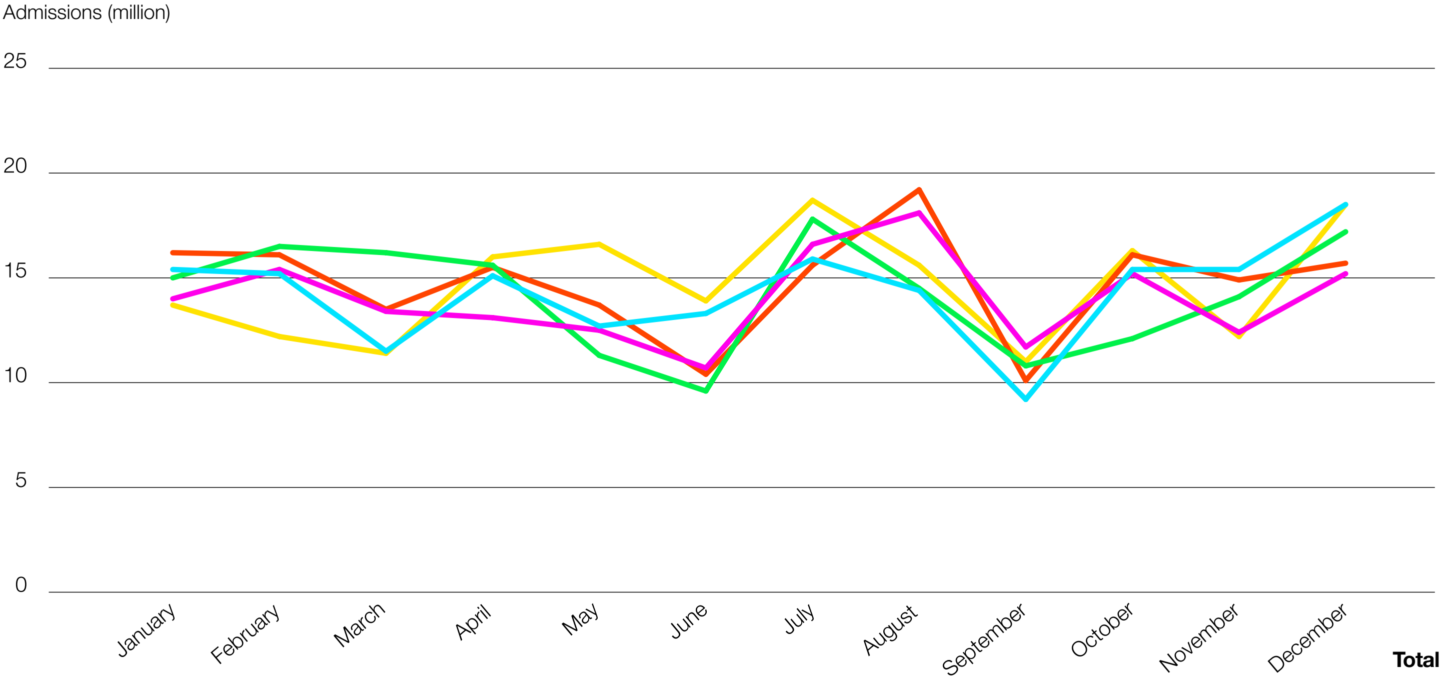
Month	2018 (million)	2019 (million)	% +/- on 2018
January	16.2	13.7	-15.4
February	16.1	12.2	-24.0
March	13.5	11.4	-15.5
April	15.5	16.0	3.1
May	13.7	16.6	20.8
June	10.4	13.9	33.7
July	15.6	18.7	19.5
August	19.2	15.6	-19.1
September	10.1	11.0	8.2
October	16.1	16.3	1.8
November	14.9	12.2	-17.8
December	15.7	18.5	18.1
Total	**177.0**	**176.1**	**-0.5**

Source: CAA, Comscore

Note: Figures for 2018 updated since publication of the 2019 Statistical Yearbook.

Looking at monthly admissions since 2015, Figure 2 shows there is a broadly similar pattern year on year, with attendances peaking during the school and festival holiday periods when people have more time to go to the cinema.

Figure 2 Monthly UK cinema admissions, 2015-2019



	January	February	March	April	May	June	July	August	September	October	November	December	Total
2015	15.4	15.2	11.5	15.1	12.7	13.3	15.9	14.4	9.2	15.4	15.4	18.5	**171.9**
2016	14.0	15.4	13.4	13.1	12.5	10.7	16.6	18.1	11.7	15.2	12.4	15.2	**168.3**
2017	15.0	16.5	16.2	15.6	11.3	9.6	17.8	14.5	10.8	12.1	14.1	17.2	**170.6**
2018	16.2	16.1	13.5	15.5	13.7	10.4	15.6	19.2	10.1	16.1	14.9	15.7	**177.0**
2019	13.7	12.2	11.4	16.0	16.6	13.9	18.7	15.6	11.0	16.3	12.2	18.5	**176.1**

Source: CAA

See note to Table 2.

Table 3 shows how the 2019 admissions break down by the television advertising regions used by the Incorporated Society of British Advertisers (ISBA). The UK's most populous region, London, accounted for the highest share of admissions (22.9%) followed by the Midlands and South and South East (with 12.0% and 11.9% respectively). Together these three regions accounted for almost half (47%) of all cinema admissions in 2019. In terms of average admissions per head of population, cinema-going is highest in London and Central Scotland and lowest in the West and Border regions.

Overall, the pattern of national and regional admissions has remained largely unchanged over the last decade. It is worth noting, however, that while London accounts for the highest number of attendances each year its share of the total has fallen in recent years; it was 25.5% in 2013.

Table 3 Cinema admissions by ISBA TV region, 2019

Region	Admissions (million)	%	Population (million)*	Admissions per person
London	40.2	22.9	13.4	3.0
Midlands	21.0	12.0	8.8	2.4
South and South East	21.0	11.9	7.5	2.8
North West	18.1	10.3	7.1	2.5
Yorkshire	15.4	8.8	6.4	2.4
East of England	14.1	8.0	4.9	2.9
Central Scotland	11.3	6.4	3.8	3.0
Wales	7.6	4.3	3.1	2.4
North East	7.0	4.0	2.7	2.6
West	5.8	3.3	3.1	1.9
Northern Ireland	5.6	3.2	1.9	2.9
South West	4.4	2.5	1.8	2.5
Northern Scotland	3.3	1.9	1.3	2.5
Border	1.1	0.6	0.6	1.9
Total	**176.1**	**100.0**	**66.4**	**2.7**

Source: CAA, Comscore

Notes:

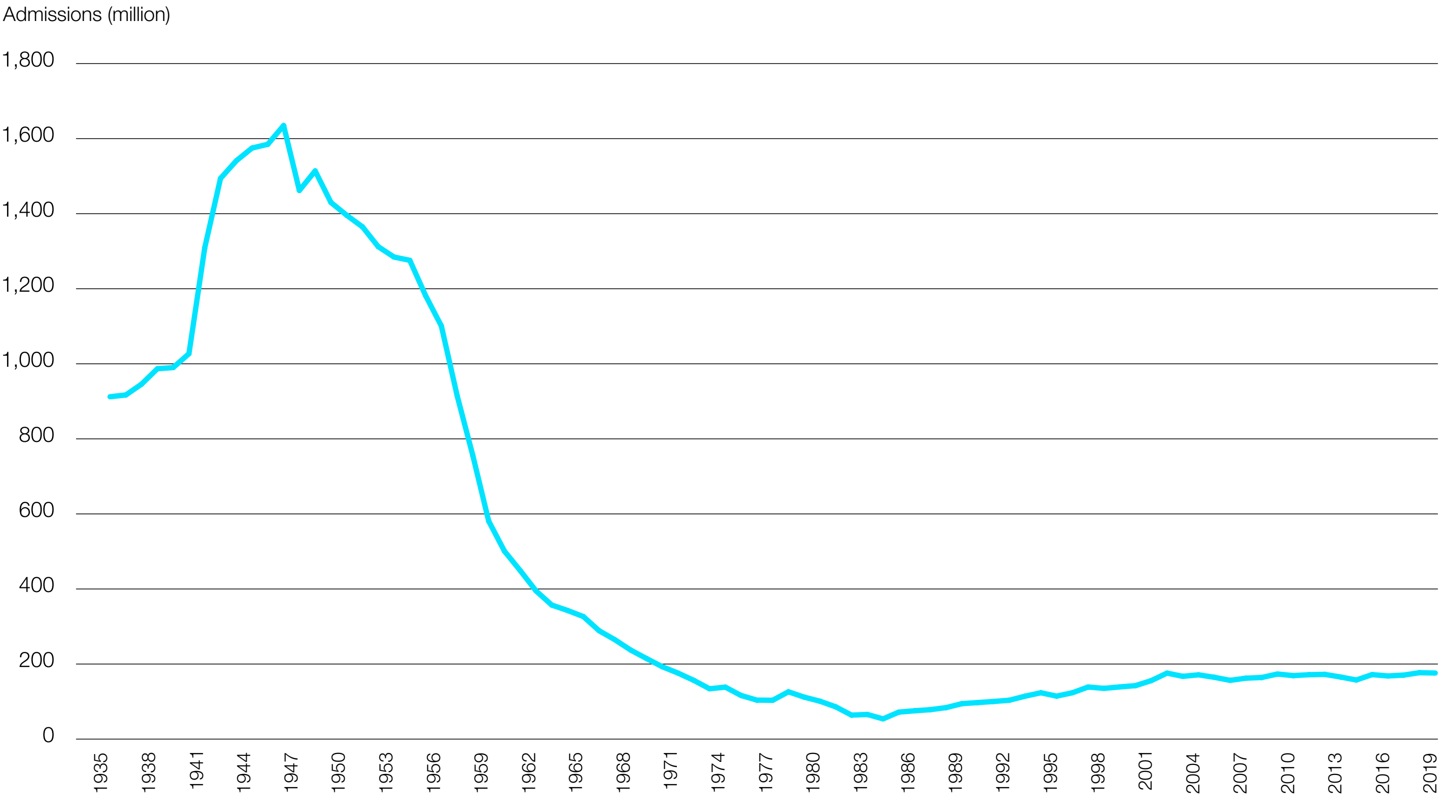
Figures/percentages may not sum to totals due to rounding.

The difference in the share of admissions between Midlands and South and South East is explained when admissions figures are shown to two decimal places: Midlands (21.05 million) and South and South East (20.97 million).

* BARB/Ipsos Connect Establishment Survey data for all individuals, Annual Data Report, ITV Areas.

Figure 3 puts UK admissions in a longer term perspective. Along with the USA and other western European countries, cinema-going in the UK declined sharply in the post-war era as incomes rose and new leisure activities became available. The largest competition came from the growth of television which allowed audiences to satisfy their appetite for screen entertainment in the comfort of their own homes. As cinema admissions fell so did the supply of screens, which led to further falling demand and more cinema closures. By the 1980s the number and quality of the remaining cinemas were at an all-time low. The introduction of the VCR in the same decade had a further negative impact on admissions and the nadir was reached in 1984 with cinema-going down to an average of one visit per person per year. However, the introduction of multiplex cinemas to the UK from 1985 onwards reversed the trend and ushered in a new period of growth which saw admissions gradually returning to levels last seen in the early 1970s.

Figure 3 Annual UK admissions, 1935-2019



Year	Admissions (million)
1935	912.3
1936	917.0
1937	946.0
1938	987.0
1939	990.0
1940	1,027.0
1941	1,309.0
1942	1,494.0
1943	1,541.0
1944	1,575.0
1945	1,585.0
1946	1,635.0
1947	1,462.0
1948	1,514.0
1949	1,430.0
1950	1,395.8
1951	1,365.0
1952	1,312.1
1953	1,284.5
1954	1,275.8
1955	1,181.8
1956	1,100.8

Year	Admissions (million)
1957	915.2
1958	754.7
1959	581.0
1960	500.8
1961	449.1
1962	395.0
1963	357.2
1964	342.8
1965	326.6
1966	288.8
1967	264.8
1968	237.3
1969	214.9
1970	193.0
1971	176.0
1972	156.6
1973	134.2
1974	138.5
1975	116.3
1976	103.9
1977	103.5
1978	126.1

Year	Admissions (million)
1979	111.9
1980	101.0
1981	86.0
1982	64.0
1983	65.7
1984	54.0
1985	72.0
1986	75.5
1987	78.5
1988	84.0
1989	94.5
1990	97.4
1991	100.3
1992	103.6
1993	114.4
1994	123.5
1995	114.6
1996	123.5
1997	138.9
1998	135.2
1999	139.1
2000	142.5

Year	Admissions (million)
2001	155.9
2002	175.9
2003	167.3
2004	171.3
2005	164.7
2006	156.6
2007	162.4
2008	164.2
2009	173.5
2010	169.2
2011	171.6
2012	172.5
2013	165.5
2014	157.5
2015	171.9
2016	168.3
2017	170.6
2018	177.0
2019	176.1

Source: BFI, CAA, Comscore

UK BOX OFFICE EARNINGS

According to Comscore, the total UK box office gross for 2019 was £1.25 billion, a slight decrease on the record high achieved in 2018. This total covers all box office earnings during calendar year 2019 for cinema screenings in the UK tracked by Comscore. The trends in box office takings from 2010 are shown in Table 4 and indicate growth of 27% in the period.

The decline in box office between 2018 and 2019 (-2.2%) was larger than the year-on-year decrease in admissions (-0.5%) shown in Table 1. This is partly due to a fall in the average ticket price, the second recorded annual decrease since our analysis began in 2002. (Trends in ticket prices are reported more fully in the Exhibition chapter.)

Table 4 UK box office trends, 2010-2019

Year	Box office gross (£ million)	Change on previous year %	Change since 2010 %
2010	988	-	-
2011	1,040	5.3	5.3
2012	1,099	5.7	11.2
2013	1,083	-1.5	9.6
2014	1,063	-1.8	7.6
2015	1,242	16.8	25.7
2016	1,228	-1.1	24.3
2017	1,279	4.2	29.5
2018	1,282	0.2	29.8
2019	1,254	-2.2	26.9

Source: Comscore

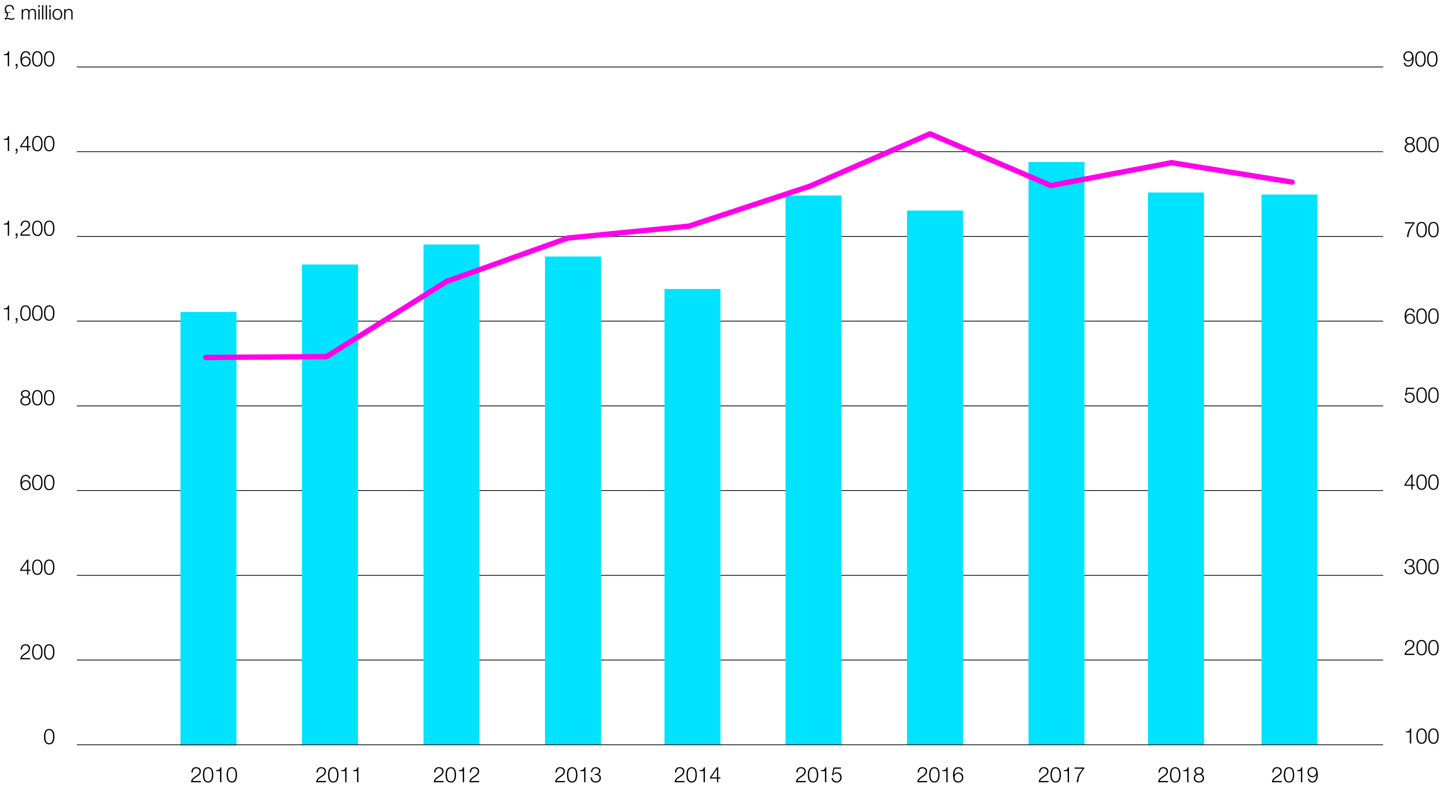
Image: *Rocketman* © 2018 Paramount Pictures. All rights reserved.

FILM RELEASES AND BOX OFFICE REVENUES IN THE UK AND REPUBLIC OF IRELAND

In 2019, 764 films (an average of just under 15 per week) were released for a week or more in the UK and Republic of Ireland, 23 fewer than in 2018. These films generated £1.3 billion in box office revenues, the same as in 2018. This figure differs from the £1.25 billion in the previous section because it includes revenues generated in 2020 by films released in 2019 and covers the Republic of Ireland as well as the UK, which distributors usually treat as a single distribution territory. The subsequent analysis in this chapter includes all titles released in 2019 and includes revenues generated up to 20 February 2020.

Figure 4 shows the number of releases and box office revenues between 2010 and 2019. Although there is an upward trend in both the number of films exhibited and theatrical earnings over the period, there is little correlation between the two.

Figure 4 Revenues and releases at the UK and Republic of Ireland box office, 2010-2019



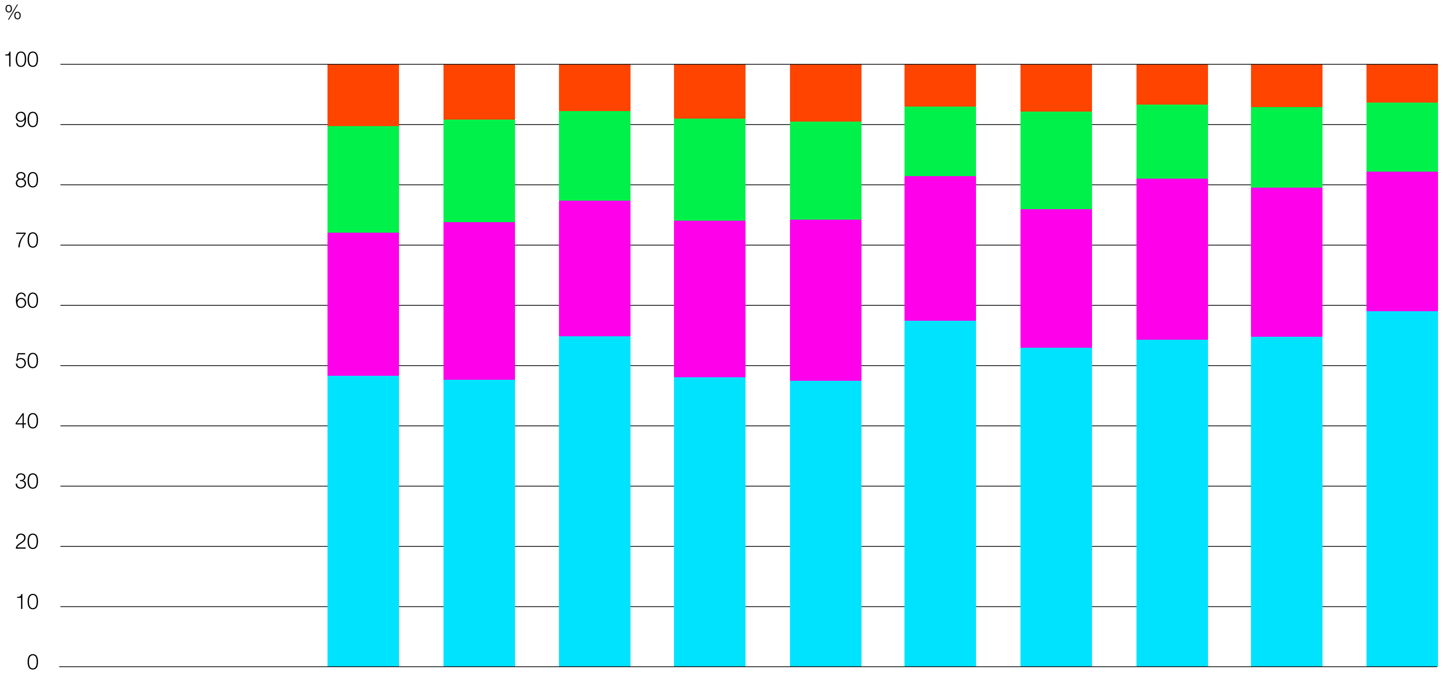
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Gross box office (£ million)	1,023.6	1,134.5	1,182.4	1,153.7	1,077.8	1,298.4	1,262.0	1,376.9	1,304.8	1,300.9
Number of releases	557	558	647	698	712	759	821	760	787	764
Average revenue per release (£ million)	1.8	2.0	1.8	1.7	1.5	1.7	1.5	1.8	1.7	1.7

Source: Comscore, BFI RSU analysis

Note: Box office up to and including 20 February 2020.

The market share of the top 50 highest grossing films has been on an upward trend since 2010, rising from 72% to 82% in 2019 (Figure 5). The concentration of box office share in the top 20 films in 2019 was 59%, the highest of the 10-year period. Six films released in 2019 earned over £50 million at the box office with the top earning title *Avengers: Endgame* accounting for nearly 7% of total theatrical revenue for the year. This is more than the combined share of all films outside the top 100.

Figure 5 Market share of top 20, 21-50, 51-100 and rest of films, 2010-2019



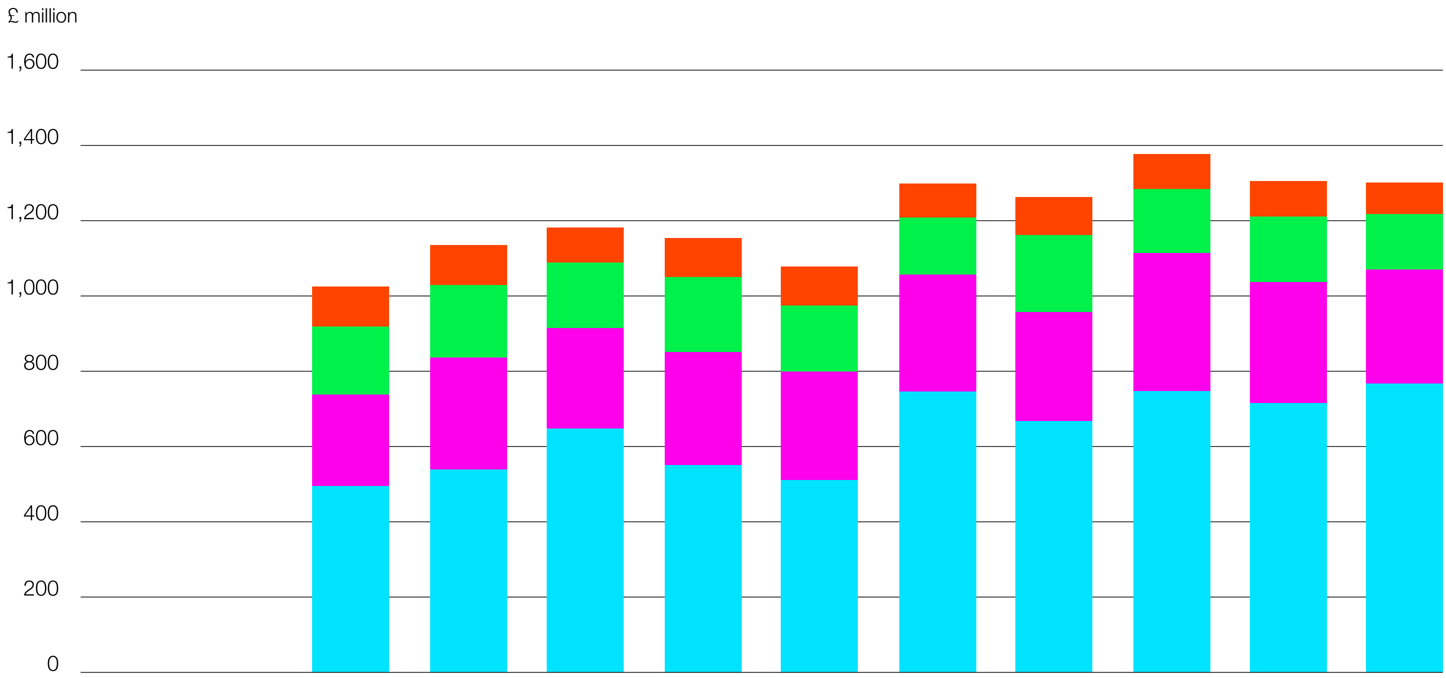
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
% share of rest	10.3	9.3	7.9	9.0	9.6	7.0	7.9	6.7	7.1	6.4
% share of 51-100	17.7	17.0	14.8	17.0	16.3	11.6	16.2	12.3	13.4	11.4
% share of 21-50	23.7	26.2	22.5	26.0	26.7	24.0	23.0	26.7	24.7	23.2
% share of top 20	48.2	47.5	54.8	48.0	47.4	57.4	52.9	54.3	54.8	59.0

Source: Comscore, BFI RSU analysis

Note: Percentages may not sum to 100 due to rounding.

As Figure 6 shows the total box office gross generated in 2019 was 27% higher than in 2010. The takings of the top 20 film releases in 2019, an all-time record at £767 million, were up 7% compared with 2018, and an increase of 55% on 2010. The films ranked 21-50 earned £302 million, down 6% compared with 2018 but up 24% on 2010, while those ranked 51-100 earned £148.5 million, a 15% decrease compared with 2018 and the lowest gross of the decade.

Figure 6 Gross box office of top 20, 21-50, 51-100 and rest of films, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Box office of rest (£ million)	106.1	105.6	92.9	104.0	103.5	90.9	100.2	92.2	93.1	82.9
Box office of 51-100 (£ million)	181.7	192.8	174.9	199.3	175.5	150.3	204.5	170.0	175.1	148.5
Box office of 21-50 (£ million)	242.9	296.8	266.5	299.3	288.1	311.6	289.6	367.2	321.7	302.3
Box office of top 20 (£ million)	494.6	539.3	647.9	551.1	510.7	745.6	667.7	747.1	714.9	767.2

Source: Comscore, BFI RSU analysis

Table 5 shows that since 2010, while there has been an overall increase in the total number of films being released, there has been a downward trend in the gross box office earnings for films outside the top 100. The £83 million generated by all films outside the top 100 in 2019 was shared by 664 titles (a median box office of £26,767) while the £106 million taken by films outside the top 100 in 2010 was split across 457 titles (a median box office of £35,905). This highlights the increasing difficulties faced by independent distributors in competing for market share but also shows their success in achieving theatrical releases for more independent films than in recent years.

Table 5 Releases and revenues of films outside the top 100, 2010-2019

	Number of films	Gross box office (£ million)	Median box office (£)
2010	457	106.1	35,905
2011	458	105.6	34,859
2012	547	92.9	22,073
2013	598	104.0	25,790
2014	612	103.5	22,027
2015	659	90.9	19,743
2016	721	100.2	16,790
2017	660	92.2	23,803
2018	687	93.1	22,154
2019	664	82.9	26,767

Source: Comscore, BFI RSU analysis

WIDEST POINT OF RELEASE

Table 6 shows the number of releases and median box office gross by the number of sites at the widest point of release (WPR). A total of 204 releases were shown at 100 sites or over (27% of all films released), while 227 films were shown at fewer than 10 sites (30%). Just under 10% of all films released in 2019 (72) were shown at 500 sites or over, a five-fold increase from the start of the decade in 2010, when only 2% of films (13) received such wide releases.

Table 6 Number of releases and median box office gross by widest point of release, 2019

Number of sites at WPR	Number of releases	% of releases	Median box office (£)	Minimum box office (£)	Maximum box office (£)
≥600	38	5.0	18,829,774	3,301,195	88,692,771
500-599	34	4.5	4,744,210	757,494	10,979,867
400-499	32	4.2	1,963,972	87,614	7,615,618
300-399	26	3.4	511,495	92,891	4,497,955
200-299	16	2.1	475,224	29,978	2,197,562
100-199	58	7.6	174,277	8,406	1,528,261
50-99	77	10.1	104,824	4,548	994,174
10-49	256	33.5	32,534	583	418,506
<10	227	29.7	5,042	40	207,112
Total	**764**	**100.0**	**38,327**	**40**	**88,692,771**

Source: Comscore, BFI RSU analysis

Note: Percentages may not sum to 100 due to rounding.

COUNTRY OF ORIGIN OF FILM RELEASES

Twenty-five per cent of all films released in the UK and Republic of Ireland in 2019 were of USA origin (excluding UK co-productions) and these films accounted for 50% of total box office earnings (Table 7). UK films, including co-productions, also represented 25% of releases (the same as in 2018) and earned 48% of the box office; UK independent films represented the majority of this share (22%, down marginally from 23% in 2018) and 13% of the box office (the same as in 2018).

Films originating outside the UK and USA accounted for 50% of releases in 2019 (up from 48% in 2018) but just 3% of earnings (the same as in 2018). Films from non-UK European countries accounted for 1.1% of the box office (from 18% of releases), the same as in 2018. It is worth noting, however, that one quarter of the box office for these films was generated by two English language European animations (*The Queen's Corgis* and *Playmobil: The Movie*). If we compare the box office of non-English language European releases with those of the previous year, we see an 18% drop (£9.8 million in 2019; £12.0 million in 2018). Films from India accounted for 1.2% of the total box office in 2019 (from 23% of releases), the same as in 2018. The share for films from the remaining world territories accounted for 0.5% of the overall box office (from 9% of releases) a slight increase from 0.3% of the box office in 2018.

Table 7 Country of origin of films released in the UK and Republic of Ireland, 2019

Country of origin	Number of releases	% of all releases	Box office gross (£ million)	% of total box office
USA	191	25.0	651.0	50.0
UK (studio-backed*)	23	3.0	450.8	34.7
UK (independent)	168	22.0	168.0	12.9
All UK	191	25.0	618.8	47.6
Other Europe	140	18.3	14.4	1.1
India	175	22.9	15.5	1.2
Rest of the world	67	8.8	6.2	0.5
Total	**764**	**100.0**	**1,300.9**	**100.0**

Source: Comscore, BFI RSU analysis

Notes:

Box office gross = cumulative total up to 20 February 2020.

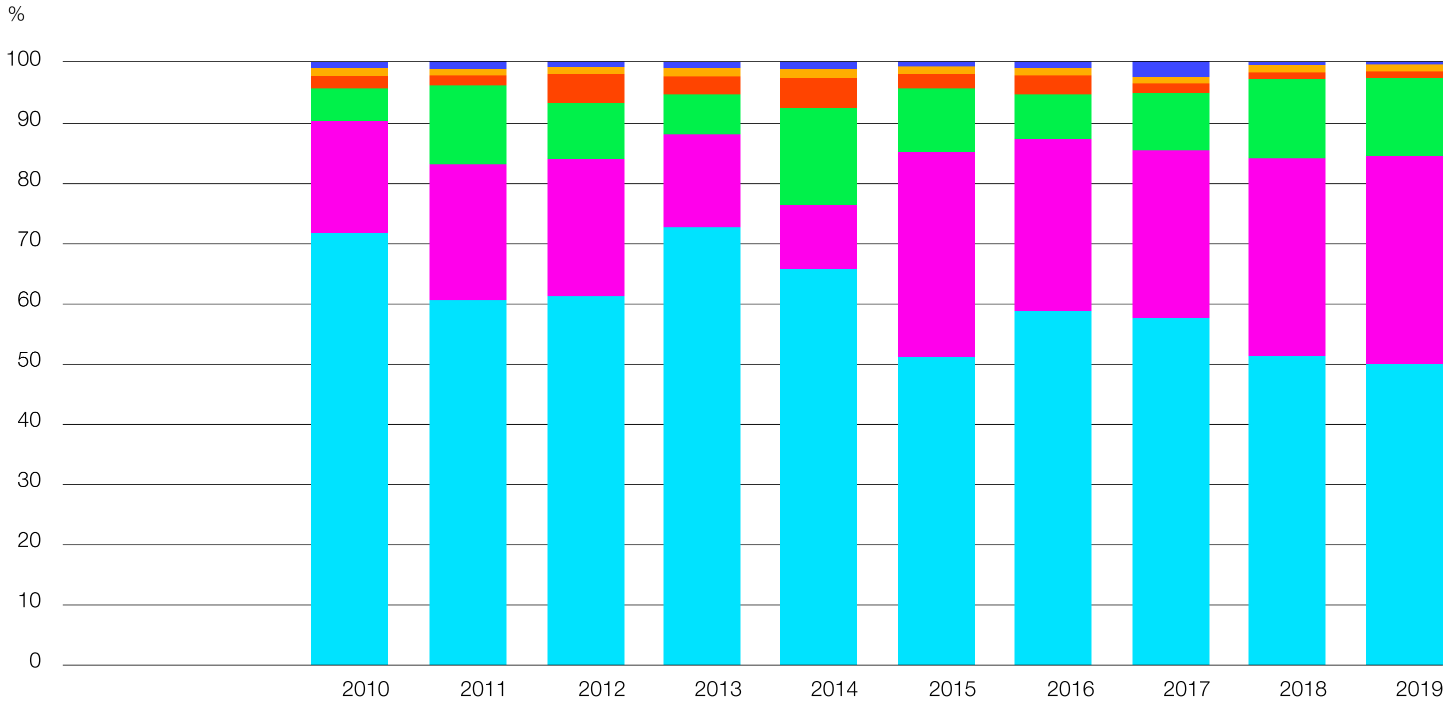
Percentages may not sum to totals due to rounding.

* 'Studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.

Figure 7 shows the breakdown of market share by country of origin for all films released between 2010 and 2019. The most significant trend over the period has been a decline in share for USA-only films which has been compensated by an increase in share for UK studio-backed titles. The combined share of USA-only and UK studio-backed films was 90% in 2010, but fell to an average of around 84% for the remainder of the period, with the exception of 2014 when the aggregate share was 76%. The main reason for the lower figure in 2014 was the record share achieved by UK independent releases (16%), which included titles such as *Paddington* and *The Inbetweeners 2*, two of the year's top five grossing films.

The high levels of market share achieved by UK studio-backed films between 2015 and 2019 reflects the number of successful big budget franchise productions making use of the UK's filmmaking infrastructure during those years.

Figure 7 Market share by country of origin, 2010-2019



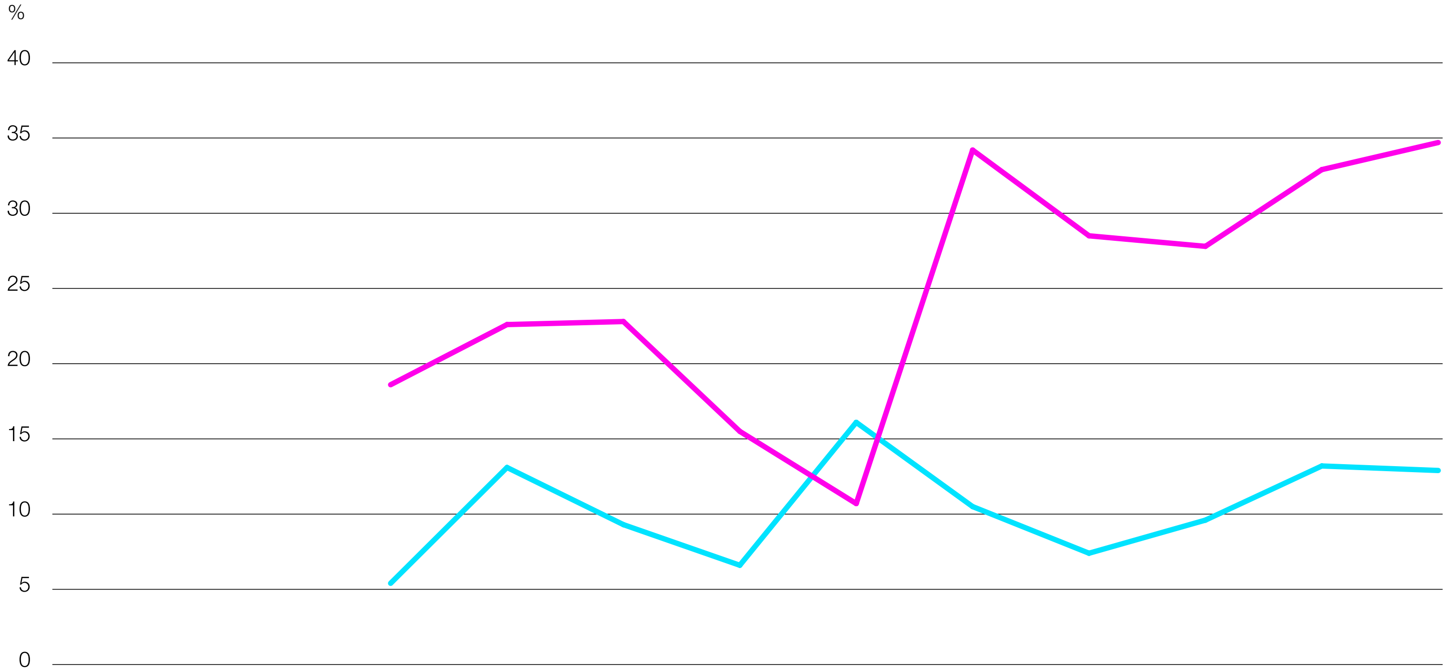
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Rest of the world	0.8	1.0	0.6	0.7	1.1	0.5	0.8	2.3	0.3	0.5
India	1.3	1.0	1.2	1.4	1.5	1.3	1.2	1.1	1.2	1.2
Other Europe	2.1	1.7	4.8	3.0	4.9	2.4	3.2	1.5	1.1	1.1
UK independent	5.4	13.1	9.3	6.6	16.1	10.5	7.4	9.6	13.2	12.9
UK studio-backed*	18.6	22.6	22.8	15.5	10.7	34.2	28.5	27.8	32.9	34.7
USA	71.8	60.6	61.3	72.7	65.8	51.1	58.9	57.7	51.3	50.0

Source: BFI, RSU

* 'UK studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.

The fluctuating pattern of UK market share is underlined in Figure 8 with the annual figure dependent on a small number of high grossing titles. The average share for UK independent films for the 10-year period was just over 10% with a slight upward trend from a low of just over 5% in 2010.

Figure 8 UK films' share of the UK theatrical market, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
UK studio-backed*	18.6	22.6	22.8	15.5	10.7	34.2	28.5	27.8	32.9	34.7
UK independent	5.4	13.1	9.3	6.6	16.1	10.5	7.4	9.6	13.2	12.9

Source: BFI, RSU

* 'UK studio-backed' means a film that was wholly or partly financed and controlled by a major US studio but which qualifies as British under the cultural test for film.

Table 8 shows the share of UK film releases by box office band over the 10-year period. In 2019, 76.5% of UK films earned less than £1 million at UK and Republic of Ireland cinemas (the second lowest share of the period), while 5% of films earned £20 million or more (the second highest share of the period). One in 10 films released in 2019 earned between £1 million and £5 million while 8% of films earned between £5 million and £20 million, a broadly similar proportion to the rest of the period.

Table 8 UK releases by box office band, 2010-2019 (£ million)

		≥20	10 – 19.99	5 – 9.99	1 – 4.99	0.1 – 0.99	<0.1	Total
2010	Number	3	6	3	10	20	77	119
	%	2.5	5	2.5	8.4	16.8	64.7	100.0
2011	Number	7	4	6	16	24	70	127
	%	5.5	3.1	4.7	12.6	18.9	55.1	100.0
2012	Number	5	3	7	13	32	102	162
	%	3.1	1.9	4.3	8.0	19.8	63.0	100.0
2013	Number	4	3	8	14	21	89	139
	%	2.8	2.2	5.8	10.1	15.1	64.0	100.0
2014	Number	3	3	9	21	28	90	154
	%	1.9	1.9	5.8	13.6	18.2	58.4	100.0
2015	Number	7	8	7	20	28	139	209
	%	3.3	3.8	3.3	9.6	13.4	66.5	100.0
2016	Number	6	5	10	17	16	122	176
	%	3.4	2.8	5.7	9.7	9.1	69.3	100.0
2017	Number	7	6	5	20	28	93	159
	%	4.4	3.8	3.1	12.6	17.6	58.5	100.0
2018	Number	9	6	9	20	48	105	197
	%	4.6	3.0	4.6	10.2	24.4	53.3	100.0
2019	Number	9	7	8	20	30	117	191
	%	4.7	3.7	4.2	10.5	15.7	61.3	100.0

Source: Comscore, BFI RSU analysis

Note: Percentages may not sum to 100 due to rounding.

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