EXHIBITION

CONTENTS

FACTS IN FOCUS

Cinemas provide the best environment for people to enjoy films as they are intended - on the big screen, with a large audience. The performance of the commercial exhibition sector is therefore an important indicator of the vitality of film culture.

- At the end of 2019, the UK had 4,480 screens in 808 cinemas.
- Multiplexes accounted for 48% of cinema sites and 82% of screens.
- There were just under seven screens for every 100,000 people in the UK, lower than countries such as the USA (12.4), France (9.3), Australia (9.2) and Spain (7.7).
- Only 7% of screens showed mainly ‘specialised’ (i.e. non-mainstream) programming, with 0.2% dedicated to Asian films.
- At the end of 2019, the three largest exhibitors owned 38% of all UK cinemas and 63% of screens.
- The average ticket price at commercial cinemas in 2019 was £7.12, down from £7.21 in 2018.
- The top three exhibitors had a 65% share of the UK and Republic of Ireland box office.
- Event cinema screenings earned a record-breaking £52 million at the UK and Republic of Ireland box office in 2019, up 24% compared with 2018 (£42 million).

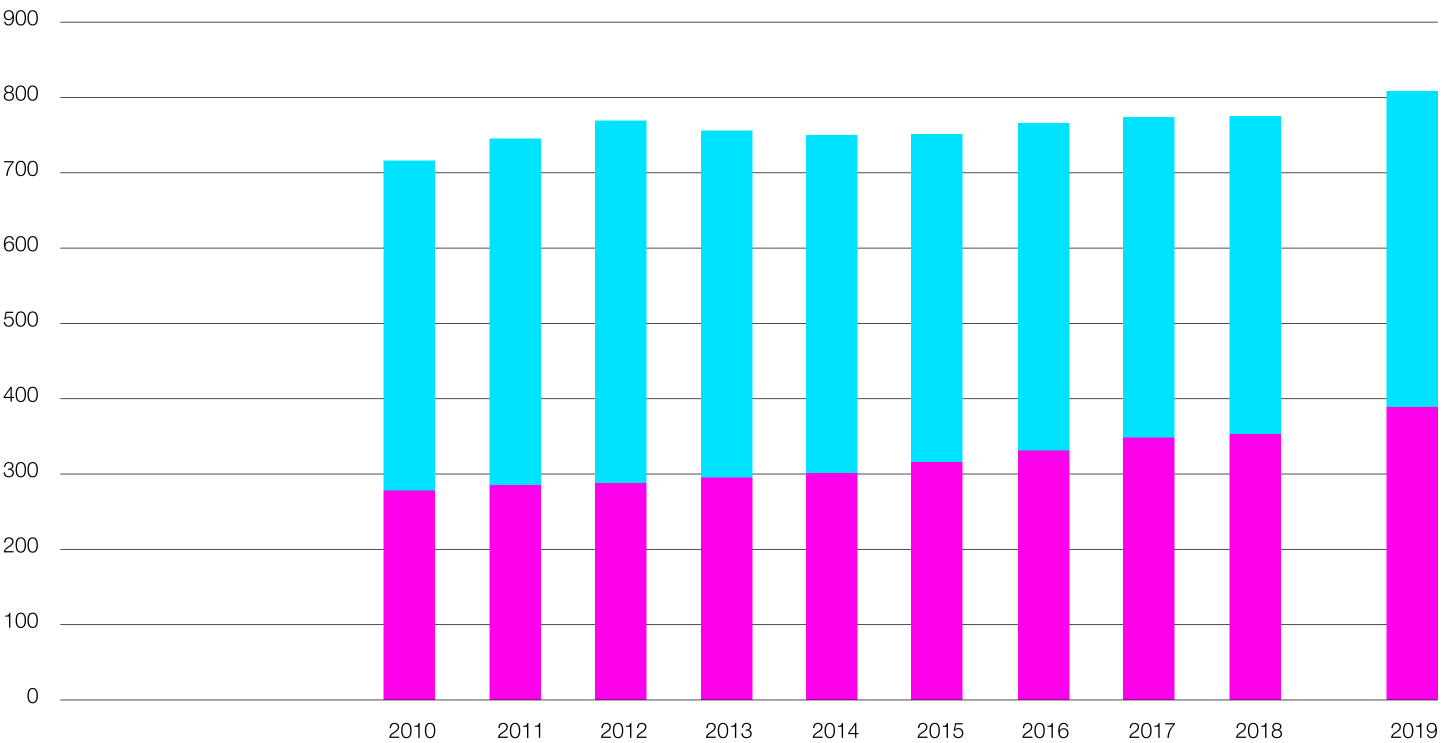
EXHIBITION

UK CINEMA SITES

Figure 1 shows the number of cinema sites in the UK from 2010 to 2019. (It should be noted that due to a change in data supply, the figures for 2019 are not historically comparable as these were calculated on the basis of a different methodology.)

The chart shows an overall increase in provision between 2010 and 2018. It also shows a change in the make-up of sites over that period. The number of cinema sites increased from 716 in 2010 to 775 in 2018, while the share of traditional and mixed-use sites declined from 61% in 2010 to 54.5% in 2018. (Mixed-use cinemas are used for film screenings only part of the time.) In 2019, there were 808 cinema sites in the UK, 419 (52%) of which were traditional and mixed-use venues.

Figure 1 UK cinema sites by type of site, 2010-2019



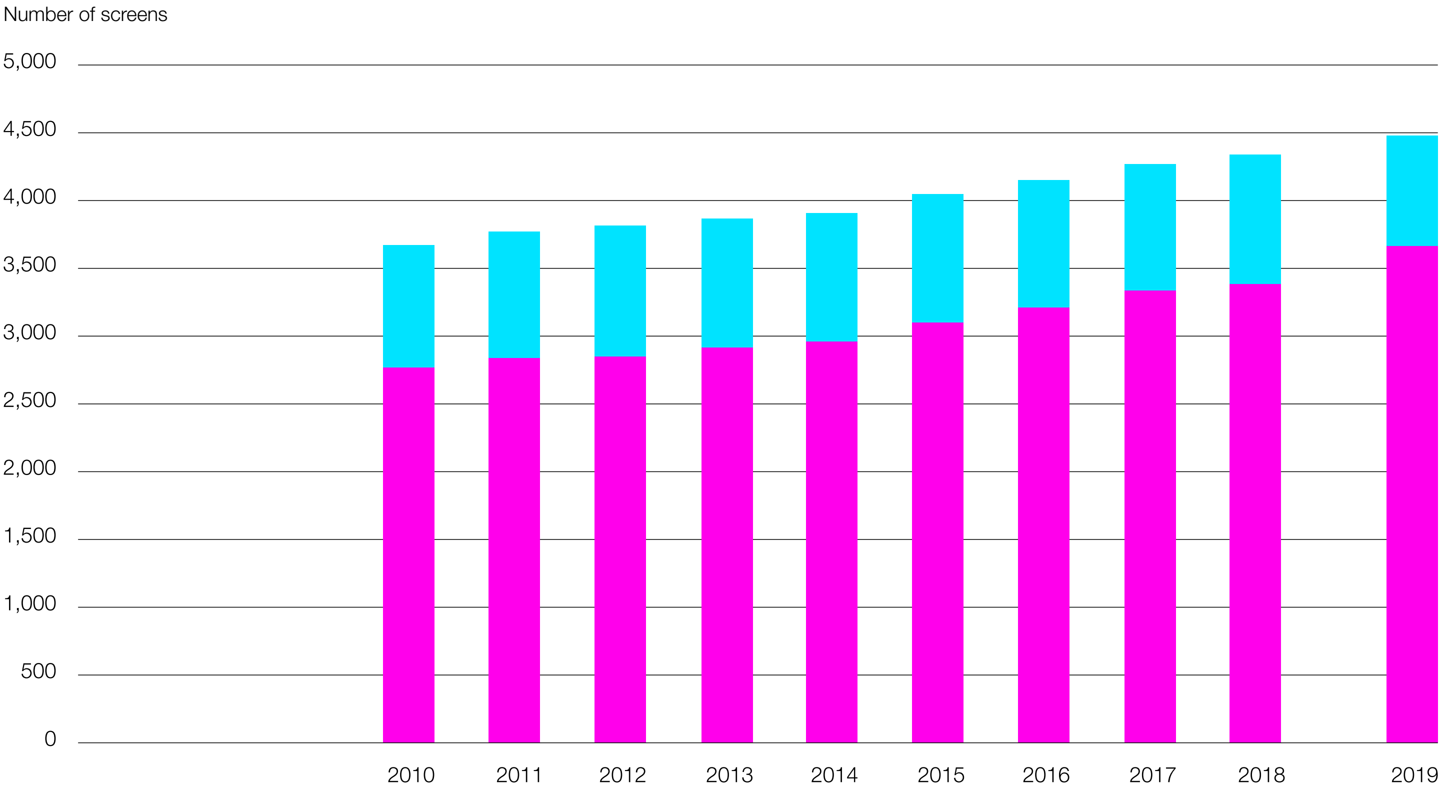
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Traditional and mixed-use	438	460	481	461	449	435	435	426	422	419
Multiplex	278	285	288	295	301	316	331	348	353	389
Total sites	716	745	769	756	750	751	766	774	775	808
% multiplex sites	38.8	38.3	37.5	39.0	40.1	42.1	43.2	45.0	45.5	48.1

Source: BFI, Dodona Research, Comscore, Omdia, Cinema Theatre Association
Notes:
The data for 2019 are not historically comparable as these were calculated on the basis of a different methodology. For 2010-2018, multiplexes are defined as purpose-built cinema complexes with five or more screens while excluding those that were converted from traditional cinema sites. For 2019, multiplexes are defined as any cinema with 5 or more screens.
Mixed-use cinemas are used for screenings only part of the time.

UK SCREENS

As Figure 2 shows, the overall number of cinema screens in the UK (excluding those operated in venues such as schools and private screening rooms) increased every year between 2010 and 2018, due primarily to an increase in multiplex provision. Although not directly comparable with these data, the figures for 2019 would suggest this trend is ongoing. In 2019, the total number of screens stood at 4,480, 82% of which were multiplex screens.

Figure 2 UK cinema screens by type of cinema, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Traditional and mixed-use	904	934	966	952	950	950	941	930	956	814
Multiplex	2,767	2,833	2,851	2,915	2,959	3,096	3,209	3,334	3,384	3,666
Total screens	3,671	3,767	3,817	3,867	3,909	4,046	4,150	4,264	4,340	4,480
% multiplex screens	75.4	75.2	74.7	75.4	75.7	76.5	77.3	78.2	78.0	81.8

Source: BFI, Dodona Research, Comscore, Omdia, Cinema Theatre Association
See notes to Figure 1.

SCREEN DENSITY AND ADMISSIONS PER HEAD OF POPULATION – INTERNATIONAL COMPARISONS

A standard way to gauge the level of cinema provision is by 'screen density', i.e. the number of screens per unit of population. According to Omdia, in 2019, screen density in the UK was 6.8 screens per 100,000 people. This level of access to screens falls short of the numbers in other major film territories: USA (12.4), France (9.3), Australia (9.2), Spain (7.7) and Italy (6.9). Germany's screen density, at 5.4 screens per 100,000 people, remained lower than the UK's.

For the fourth consecutive year, the world's fastest expanding territory, China, gained an additional 10,000 cinema screens, which increased its number of screens per 100,000 people from 4.3 in 2018 to 4.9.

Table 1 shows the level of admissions per head of population in a number of major film territories. The UK saw more admissions per capita (2.6) than Spain, Italy and Germany despite having a lower screen density than Spain and Italy. Of the selected territories, the USA (3.5) and Australia (3.4) had the highest admissions per head of population.

Table 1 Admissions per head of population in selected major film territories, 2010-2019 (ranked by 2019 admissions)

	USA	Australia	France	UK	Spain	Italy	Germany
2010	4.0	4.2	3.3	**2.7**	2.2	1.8	1.6
2011	3.8	3.8	3.4	**2.7**	2.1	1.7	1.6
2012	3.9	3.8	3.2	**2.7**	2.0	1.5	1.7
2013	3.8	3.5	3.0	**2.6**	1.7	1.6	1.6
2014	3.6	3.3	3.2	**2.4**	1.9	1.5	1.5
2015	3.8	3.8	3.1	**2.6**	2.0	1.7	1.7
2016	3.8	3.8	3.2	**2.6**	2.2	1.8	1.5
2017	3.5	3.5	3.2	**2.6**	2.2	1.6	1.5
2018	3.7	3.6	3.0	**2.7**	2.1	1.4	1.3
2019	3.5	3.4	3.2	**2.6**	2.3	1.6	1.4

Source: Omdia
Note: Data updated since publication of the 2019 Statistical Yearbook.

SCREEN DENSITY AND ADMISSIONS PER HEAD OF POPULATION IN THE UK

Tables 2 and 3 present screen provision data for the UK based on two types of national/regional classification. The datasets are not directly comparable because of differences in the way the regions are defined; they do, however, shed light on different aspects of national and regional variation in screen provision.

Table 2 shows screen and admissions data for the television advertising regions used by the Incorporated Society of British Advertisers (ISBA). The table shows that, although London had the greatest numbers of screens and sites, its screen density, at 7.4 screens per 100,000 people, was lower than that of Northern Ireland (11.3), Central Scotland (7.7) and the Midlands (7.6). The South and South East had the lowest screen density (5.2) of all the ISBA regions followed by the West (5.3) and Border (5.5).

The average cost of a cinema ticket in the UK in 2019 was £7.12, down from £7.21 in 2018. This is the second consecutive year to see a decrease in the average ticket price. The UK Cinema Association, which represents the interests of the majority of UK cinema operators, partially attributed these decreases to 'tactical discounting', which is seen in areas with strong local competition among exhibitors, as well as the impact of nationwide discount schemes such as Meerkat Movies, Cineworld Unlimited and Odeon Limitless. Table 2 does, however, highlight the wide variation in ticket prices across the country, with an average ticket in London (£8.64) being over 60% more expensive than in Northern Ireland (£5.29).

Table 2 Screens and admissions by ISBA TV region, 2019 (ranked by screens per 100,000 people)

ISBA TV region	Screens per 100,000 people	Screens	% of total screens	Sites	Population (million)*	Admissions (million)	Admissions per screen	Admissions per head of population	Average ticket price (£)#
Northern Ireland	11.3	214	4.8	31	1.9	5.6	26,168	2.9	5.29
Central Scotland	7.7	291	6.5	40	3.8	11.3	38,832	3.0	6.78
Midlands	7.6	664	14.8	117	8.8	21.0	31,627	2.4	7.04
London	7.4	985	22.0	169	13.4	40.2	40,812	3.0	8.64
North West	6.9	487	10.9	71	7.1	18.1	37,166	2.5	6.53
Wales	6.5	201	4.5	49	3.1	7.6	37,811	2.4	5.68
South West	6.4	116	2.6	36	1.8	4.4	37,931	2.5	5.90
North East	6.4	173	3.9	31	2.7	7.0	40,462	2.6	6.31
Northern Scotland	6.4	83	1.9	21	1.3	3.3	39,759	2.5	6.45
Yorkshire	6.2	394	8.8	62	6.4	15.4	39,086	2.4	6.55
East of England	5.8	282	6.3	52	4.9	14.1	50,000	2.9	7.16
Border	5.5	33	0.7	15	0.6	1.1	33,333	1.9	6.53
West	5.3	165	3.7	32	3.1	5.8	35,152	1.9	6.88
South and South East	5.2	392	8.8	82	7.5	21.0	53,571	2.8	7.11
Total	**6.8**	**4,480**	**100.0**	**808**	**66.4**	**176.1**	**39,308**	**2.7**	**7.12**

Source: BFI, Comscore, Cinema Theatre Association, Dodona Research, BARB, Cinema Advertising Association (CAA)
Notes:
* The population totals in Tables 2 and 3 are both 2019 estimates but differ slightly due to the difference in regional estimates.
# Average ticket prices for the UK as a whole are calculated by dividing the UK-only box office gross by total UK admissions. In 2019, the box office gross was £1.254 billion and admissions were 176.1 million.
Figures may not sum to totals due to rounding.

Table 3 provides screen information for each of the English regions, as defined by the UK Government, plus Scotland, Wales and Northern Ireland. Northern Ireland had the highest number of screens per 100,000 people in 2019 (11.5), followed by London (7.7) and Wales (7.5). The East Midlands had the fewest screens per 100,000 people at 5.3, followed by the North East and East of England at 6.1.

Table 3 Screens and population in the nations and regions, 2019 (ranked by screens per 100,000 people)

Nation/region	Screens	% of total screens	Sites	Population (million)*	Screens per 100,000 people	Average number of screens per site
Northern Ireland	214	4.8	31	1.9	11.5	6.9
London	688	15.4	120	8.9	7.7	5.7
Wales	233	5.2	55	3.1	7.5	4.2
Scotland	379	8.5	66	5.4	7.1	5.7
South West	380	8.5	88	5.5	6.9	4.3
North West	480	10.7	73	7.2	6.7	6.6
Yorkshire and The Humber	358	8.0	56	5.4	6.6	6.4
South East	574	12.8	111	9.0	6.4	5.2
West Midlands	366	8.2	62	5.8	6.3	5.9
East of England	377	8.4	68	6.1	6.1	5.5
North East	160	3.6	27	2.6	6.1	5.9
East Midlands	252	5.6	45	4.7	5.3	5.6
England sub-total	3,635	81.1	650	55,2	6.6	5.6
Other	19	0.4	6	n/a	-	-
Total	**4,480**	**100.0**	**808**	**65.6**	**6.8**	**5.6**

Source: BFI, Office for National Statistics (ONS)
Notes:
* See note to Table 3.
n/a = not available.
Figures/percentages may not sum to totals due to rounding.
Other includes the Channel Islands and Isle of Man.

TYPE OF CINEMA SCREENS BY NATION AND REGION

Table 4 provides a snapshot of variations in multiplex provision around the UK. London had the largest number of multiplex screens (567) in 2019, followed by the South East (463) and the North West (412). Northern Ireland had the highest proportion of multiplex screens (92%) followed by Yorkshire and The Humber (87%), the North West and the North East (both with 86%). In England the lowest concentration of multiplex screens was found in the South West (68%), which had the joint highest number of traditional and mixed-use screens along with London (121). Across the nations, after Northern Ireland, England had the highest proportion of multiplex screens (82%), followed by Wales and Scotland (both with 80%).

Table 4 Cinema screens by type by nation or region, 2019 (ranked by % multiplex)

Nation/region	Multiplex	% multiplex	Traditional and mixed-use	Total
Northern Ireland	196	91.6	18	214
Yorkshire and The Humber	313	87.4	45	358
North West	412	85.8	68	480
North East	137	85.6	23	160
East Midlands	212	84.1	40	252
West Midlands	306	83.6	60	366
London	567	82.4	121	688
South East	463	80.7	111	574
Wales	187	80.3	46	233
Scotland	303	79.9	76	379
East of England	301	79.8	76	377
South West	259	68.2	121	380
Other	10	52.6	9	19
England sub-total	2,970	81.7	665	3,635
Total	**3,666**	**81.8**	**814**	**4,480**

Source: BFI, Dodona Research, Comscore, Omdia, Cinema Theatre Association

MAINSTREAM, SPECIALISED AND ASIAN PROGRAMMING

Dodona Research categorises screens according to whether they show mostly mainstream, specialised (i.e. non-mainstream, including 'arthouse') or Asian films.

Table 5 shows that by far the majority of screens primarily show mainstream films. In 2019, 667 cinemas with 4,146 screens showed mostly mainstream films (83% of sites, 93% of screens). There were 138 sites with 327 screens showing mainly specialised films (17% of sites, 7% of screens) and three cinemas with seven screens dedicated mainly to Asian films (0.4% of sites, 0.2% of screens).

For the fourth consecutive year, the majority of specialised screens (53%) were found in chain cinemas rather than single, independent venues. This is partly a result of recent increases in the number of sites owned by boutique cinema chains such as Everyman, Light Cinemas and Picturehouse (itself owned by Cineworld) which have a broader programming focus than the larger exhibitors.

Table 5 Sites and screens by programme, 2010-2019

Programme	Sites									
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Mainstream	550	571	589	586	583	595	604	609	610	667
Specialised	163	171	177	168	165	153	159	162	162	138
Asian*	3	3	3	2	2	3	3	3	3	3
Total	**716**	**745**	**769**	**756**	**750**	**751**	**766**	**774**	**775**	**808**
Programme	**Screens**									
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Mainstream	3,416	3,501	3,542	3,598	3,630	3,760	3,844	3,946	3,999	4,146
Specialised	248	259	268	265	275	280	300	312	335	327
Asian*	7	7	7	4	4	6	6	6	6	7
Total	**3,671**	**3,767**	**3,817**	**3,867**	**3,909**	**4,046**	**4,150**	**4,264**	**4,340**	**4,480**

Source: BFI, Dodona Research, Comscore, Omdia, Cinema Theatre Association
* Dodona Research renamed this category in 2018; it was previously titled 'South Asian'.

Cinema screens showing mainly specialised films were concentrated in London and the South East, which jointly accounted for 56% of the UK total in 2019 (Table 6). Yorkshire and The Humber had 27 screens (8% of all specialised screens) whilst Scotland and the East of England both had 23 (7%). Northern Ireland (0.6%), the North East (1.5%) and Wales (2.1%) had the smallest shares of specialised screens.

The seven screens showing Asian films were found in only three cinemas; two in London and the other in Leicester in the East Midlands.

Table 6 Geographical spread of specialised screens, 2019

Nation/region	Number of specialised screens	% of specialised screens
London	130	39.8
South East	52	15.9
Yorkshire and The Humber	27	8.3
Scotland	23	7.0
East of England	23	7.0
North West	20	6.1
South West	16	4.9
East Midlands	12	3.7
West Midlands	10	3.1
Wales	7	2.1
North East	5	1.5
Northern Ireland	2	0.6
Other	0	-
England sub-total	295	90.2
Total	**327**	**100.0**

Source: BFI, Dodona Research, Comscore, Omdia, Cinema Theatre Association
Note: Percentages may not sum to 100 due to rounding.

EXHIBITORS

The UK exhibition sector is made up of a small number of larger exhibitors which own and operate the majority of sites and screens and a large number of smaller companies with one or two sites and screens. At the end of 2019, 16 exhibitors (5% of all exhibitors) owned or programmed 20 or more screens in the UK (Table 7). The three largest exhibitors owned 38% of all UK cinemas and 63% of UK screens.

Table 7 Cinema screens by exhibitors with 20 or more screens, 2019

Exhibitor	Sites	Screens	% of total screens
Cineworld	102	1,060	23.7
Odeon	112	919	20.5
Vue	90	862	19.2
Showcase Cinemas	21	275	6.1
Empire Cinemas	18	132	2.9
Omniplex	15	114	2.5
Everyman	29	91	2.0
Picturehouse (Cineworld)	26	89	2.0
Light Cinemas	11	78	1.7
Reel Cinemas	13	60	1.3
Curzon Cinemas	18	54	1.2
Merlin Cinemas	15	41	0.9
Movie House Cinemas	6	39	0.9
Irish Multiplex Cinemas	5	33	0.7
Savoy Cinemas	8	30	0.7
Parkway Entertainment	4	20	0.4
Others (19 major exhibitors and 264 independent single venue exhibitors)	315	583	13.0
Total	**808**	**4,480**	**100.0**

Source: BFI, Dodona Research, Comscore, Omdia, Cinema Theatre Association
Notes:
Figures correct as at December 2019.
Percentages may not sum to 100 due to rounding.
Cineworld was formed in 1995 and acquired the former Cine-UK and UGC chains in 2004. It also acquired Picturehouse in 2012.
Odeon was bought by US cinema chain AMC Entertainment in 2016. It was previously owned by Terra Firma Capital Partners, a European private equity firm.
Vue, which acquired Warner Village cinemas in 2003 and the Apollo cinema chain in 2012, was sold to Canadian investors Omers Private Equity and Alberta Investment Management in 2013.
Showcase Cinemas is owned by National Amusements which in turn is owned by the family of the late Sumner Redstone, former chairman of US media giant Viacom.
Empire Cinemas is owned by Irish entrepreneur Thomas Anderson. It emerged as a buyer of sites from UCI and Odeon in 2005 and UGC and Cineworld in 2006, which were divested as a result of the companies' mergers.
Omniplex Cinemas is owned by the Anderson family. It has a dominant position in Ireland, operating 48% of cinemas and 53% of screens across the Republic of Ireland and Northern Ireland.

EXHIBITOR REVENUES

As Table 8 shows, the top nine exhibitors had an 81% share of overall box office receipts in the UK and Republic of Ireland in 2019; 65% of the box office was shared between the top three exhibitors.

We estimate that exhibitors' revenues from refreshment sales in 2019 totalled £537 million, down 2% compared with 2018 (£549 million). The average spend on refreshments per individual visit was £3.10, the same as in 2018.

Table 8 Exhibitor share of box office in the UK and Republic of Ireland, 2019

Exhibitor	Market share (%)	Box office gross* (£ million)
Cineworld	23.0	311.9
Odeon	21.9	296.8
Vue	20.0	271.0
Showcase Cinemas	6.0	81.9
Everyman	3.1	41.8
Empire Cinemas	2.4	32.0
Picturehouse (Cineworld)	2.2	30.5
Light Cinemas	1.6	21.2
Curzon Cinemas	1.0	14.0
Sub-total	81.1	1,101.3
Other	18.9	256.1
Total	**100.0**	**1,357.4**

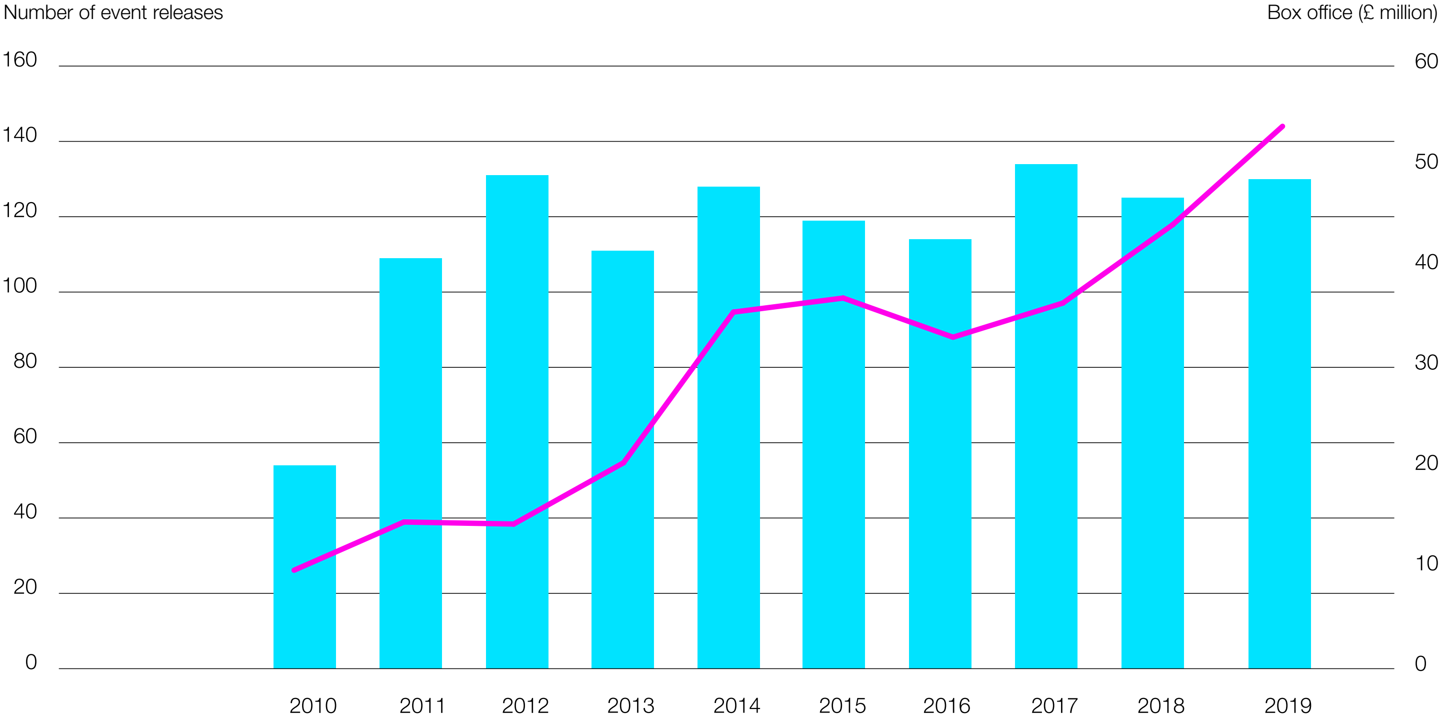
Source: Comscore
Notes:
* Box office gross is for all films and event cinema screenings shown in cinemas in 2019. This includes titles first released in 2018.
Figures/percentages may not sum to totals/sub-totals due to rounding.

EVENT CINEMA

Event cinema, alternative content or non-feature film programming has provided a growing revenue stream for the exhibition sector in the past decade. Event cinema screenings have potentially improved the use of auditorium capacity during typically quiet periods and, as 'events' are usually shown only once or twice (often as a simultaneous screening of a live performance and a subsequent catch-up screening), can often generate higher occupancy rates than feature films. Event cinema screenings also tend to have higher ticket prices than standard film screenings. This is particularly the case with the immersive cinema screenings offered by London-based Secret Cinema, whose 2019 ticket prices ranged from £49 to £175.

As Figure 3 show, the annual box office earnings generated by event cinema releases in the UK and Republic of Ireland increased by 560% over the past decade, rising from £8 million in 2010 to £52 million in 2019. There has also been an overall upward trend in the volume of releases, which increased by 140% between 2010 and 2019.

Figure 3 Volume and value of event cinema releases in the UK and Republic of Ireland, 2010-2019



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Number of event releases	54	109	131	111	128	119	114	134	125	130
Box office (£ million)	7.9	12.7	12.5	18.6	33.6	35.0	31.1	34.5	42.3	52.1

Source: comScore
Note: Figures include Secret Cinema screenings.

As Table 9 shows, 130 individual events, the majority of which were live, were screened (at least once) in 2019. The box office generated by these screenings (£52 million) set a new all-time record for the event cinema sector. Opera had the greatest number of releases with screenings of 27 different productions (21% of all events), while screenings of theatre performances generated the highest earnings (£20 million), a 38% share of the total box office.

Table 9 Volume and value of event cinema releases in the UK and Republic of Ireland by type of event, 2019 (ranked by gross box office)

Type of event	Number of events	% of events	Gross box office (£ million)	% of gross box office
Theatre	23	17.7	19.6	37.6
Film	3	2.3	8.7	16.7
Popular music concert	26	20.0	6.7	12.9
Ballet	24	18.5	5.5	10.5
Opera	27	20.8	5.3	10.1
Classical music concert	5	3.8	4.0	7.7
TV	2	1.5	0.8	1.6
Children's TV special	8	6.2	0.7	1.3
Exhibition	6	4.6	0.5	1.0
E-Sports	5	3.8	0.3	0.7
Sport	1	0.8	<0.1	<0.1
Total	**130**	**100.0**	**52.1**	**100.0**

Source: Comscore
See note to Figure 3.
Percentages/figures may not sum to totals due to rounding.

Image: *Casino Royale* © 2006 Danjaq, LLC and United Artists Corporation and Columbia Pictures Industries, Inc. All rights reserved

TOP 10 EVENT CINEMA RELEASES 2019

The Secret Cinema screening of 2006's *Casino Royale* was the highest grossing event cinema release at the UK and Republic of Ireland box office in 2019 with earnings of £8.4 million (Table 10). Daniel Craig's first outing as James Bond became the UK's all-time highest earning event cinema release, surpassing the 2015 Secret Cinema release of *Star Wars IV: The Empire Strikes Back* (£6.3 million). Also record-breaking was the second highest grossing event release of 2019. With earnings of £4.3 million, the National Theatre's release of Phoebe Waller-Bridge's one-woman show *Fleabag*, became the new all-time top grossing non-Secret Cinema event release in the UK and Republic of Ireland, overtaking 2015's release of the National Theatre's production of *Hamlet* (£3.4 million). The 2019 list is dominated by theatre productions, with six of the top 10 events being screenings of plays or musicals.

Table 10 Top 10 event cinema releases in the UK and Republic of Ireland, 2019

Rank	Title	Type of event	Country of origin	Distributor	Number of cinemas at widest point of release	Gross box office (£ million)
1	Casino Royale (Secret Cinema)	Film	UK/USA/Cze	Secret Cinema	1	8.4
2	Fleabag - NT Live 2019	Theatre	UK	NT Live	628	4.3
3	Les Misérables: The Staged Concert	Theatre	UK	Universal	595	3.3
4	Take That - Greatest Hits Live	Popular music concert	UK	CinemaLive	627	2.1
5	Andre Rieu 2019 New Year Concert from Sydney	Classical music concert	Aus/Nld	Piece of Magic	601	1.9
6	Andre Rieu 2019 Maastricht Concert - Shall We Dance?	Classical music concert	Nld	Piece of Magic	647	1.8
7	42nd Street - The Musical	Theatre	UK	More2Screen	602	1.4
8	One Man, Two Guvnors - NT Live 2019 Encore	Theatre	UK	NT Live	579	1.3
9	Present Laughter - NT Live 2019	Theatre	UK	NT Live	585	1.2
10	All About Eve - NT Live 2019	Theatre	UK	NT Live	567	1.2

Source: Comscore

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