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DISTRIBUTION

# CONTENTS

<b>Facts in focus</b> .....	03
<b>Distributors</b> .....	04
<b>Width of release</b> .....	08
<b>Weekend box office</b> .....	10
<b>Film advertising</b> .....	11

# FACTS IN FOCUS

The UK theatrical marketplace is dominated by a few very large companies. In 2019, the top 10 distributors generated £1.27 billion in box office revenues, while the remainder made £62 million.

- The top 10 distributors had a 95% share of the market in 2019; Walt Disney was the top earning distributor with theatrical revenues of £507 million.
- The market share for the 130 distributors outside the top 10 was 5%.
- The highest earning distributor of UK independent films was Universal, but Entertainment One and Altitude handled the largest number of such films.
- In 2019, 63% of films were released at fewer than 50 sites, compared with 64% in 2018.
- In 2019, eight titles including *Star Wars: The Rise of Skywalker*, *Downton Abbey* and *The Lion King* were released at over 700 sites, compared with only two in 2018.
- In 2019, 29% of total theatrical revenue was generated during opening weekends.
- The estimated total amount spent by distributors on advertising films released theatrically was £201 million.

# DISTRIBUTION

## DISTRIBUTORS

The top 10 feature film distributors in 2019 had a 95% share of the market from the release of 248 titles (27% of all films on release). The top 10 distributors in 2018 achieved a similar share from 251 releases (26% of films on release). A further 130 film distributors were involved in the theatrical release of films in the UK and Republic of Ireland in 2019, compared with 128 companies outside the top 10 in 2018. In 2019, distributors outside the top 10 handled a total of 671 titles (73% of all films on release) but generated only 5% of the total box office.

Table 1 shows box office takings by distributor for all films on release during 2019, and hence includes revenues for titles which were released in 2018 but remained in cinemas into 2019. The top earning distributor was Walt Disney, with total revenues of £507 million, a 38% share of the overall

box office. Walt Disney's market share is the largest achieved by a single distributor since our records begin. (If added to the total from 20th Century Fox, which Walt Disney acquired in early 2019, the total share would be 44%.) Walt Disney titles made up eight of the top 20 releases of 2019, including the year's three highest earning films, *Avengers: Endgame* (£89 million), *The Lion King* (£76 million) and *Toy Story 4* (£66 million). The second highest earning distributor in 2019 was Universal, which released four of the year's top 20 titles including *Downton Abbey* (£28 million), *Fast & Furious: Hobbs & Shaw* (£21 million) and *How to Train Your Dragon: The Hidden World* (£20 million).

The top earning independent distributor in 2019 was Lionsgate, whose highest grossing titles were *Knives Out* (£13 million), *John Wick: Chapter 3 – Parabellum* (£10 million) and *Angel Has Fallen* (£7.5 million).

**Table 1 Distributor share of box office, UK and Republic of Ireland, 2019**

Distributor	Market share (%)	Films on release in 2019	Box office gross (£ million)
Walt Disney	37.9	24	506.8
Universal	13.9	39	185.6
Warner Bros	12.4	40	166.3
Sony	9.3	27	124.7
Paramount	5.9	13	79.0
20th Century Fox*	5.7	30	75.5
Lionsgate	4.2	19	56.4
Entertainment One	3.8	27	50.4
STX Entertainment	1.2	7	15.4
StudioCanal	1.0	22	14.0
Top 10	95.4	248	1,274.1
Others (Total 130 distributors)	4.6	671	61.6
<b>Total</b>	<b>100.0</b>	<b>919</b>	<b>1,335.8</b>

Source: Comscore

Notes:

The total here differs from Table 5 as it includes all films on release in 2019, including titles first released in 2018.

Box office gross = cumulative box office total for all films handled by the distributor in the period 1 January 2019 to 31 December 2019.

Figures may not sum to sub-totals/totals due to rounding.

\* From October 2019, 20th Century Fox titles were released under the Walt Disney label.



Table 2 shows the top 10 distributors by market share between 2010 and 2019. Four different distributors claimed the top spot in the first six years of the period: Warner Bros (2010, 2011, 2013), Sony (2012), 20th Century Fox (2014) and Universal (2015). Between 2016 and 2019, Walt Disney was the UK's highest earning film distributor, the longest consecutive run in the top spot since our records began. Six independent distributors have ranked among the top 10 distributors of the year over the period. Entertainment One has featured in the list every year, while Lionsgate, Optimum/

StudioCanal and Entertainment Film Distributors have each appeared nine times. In 2019, STX Entertainment appeared in the list for the first time. Its top earning titles included US independent titles *Hustlers* (£8 million) and *The Upside* (£2 million).

Throughout the period, the share of box office generated by distributors outside the top 10 has ranged from 3.7% in 2014 to 6.3% in 2010. The share in 2019, at 4.6%, was the highest since 2012.

**Table 2 Distributor market share as percentage of box office gross, 2010-2019 (ranked by 2019 market share)**

Distributor	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Walt Disney	14.0	8.7	10.2	15.2	10.1	20.0	23.2	19.7	23.6	37.9
Universal	10.2	11.8	10.7	15.1	11.2	21.6	14.0	16.0	19.5	13.9
Warner Bros	18.3	18.2	12.9	17.2	15.9	9.0	15.6	16.6	13.9	12.4
Sony	6.9	7.2	18.0	8.7	6.2	11.8	6.6	10.3	10.7	9.3
Paramount	14.8	16.3	7.7	7.8	5.8	4.0	5.4	3.7	4.8	5.9
20th Century Fox <sup>1</sup>	15.9	12.1	16.1	13.1	21.8	14.9	15.7	15.1	14.5	5.7
Lionsgate	3.5	-	5.7	4.7	5.5	4.0	4.0	6.3	1.5	4.2
Entertainment One	5.5	5.1	6.7	9.0	8.0	3.9	8.4	2.5	3.2	3.8
STX Entertainment	-	-	-	-	-	-	-	-	-	1.2
Optimum/StudioCanal <sup>2</sup>	2.2	3.8	-	2.8	6.7	4.7	1.5	4.2	2.8	1.0
Entertainment Film Distributors	2.5	6.7	3.1	1.9	5.2	1.6	1.5	1.7	1.1	-
Momentum <sup>3</sup>	-	4.6	4.3	-	-	-	-	-	-	-
Top 10 total <sup>4</sup>	93.7	94.4	95.4	95.5	96.3	95.5	95.9	96.1	95.5	95.4
Others	6.3	5.6	4.6	4.5	3.7	4.5	4.1	3.9	4.5	4.6
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: Comscore

Notes:

<sup>1</sup> 20th Century Fox was bought by Walt Disney in March 2019. From October 2019, existing 20th Century Fox titles were released under the Walt Disney label.

<sup>2</sup> Optimum Releasing, the UK subsidiary of StudioCanal, was rebranded as StudioCanal in September 2011.

<sup>3</sup> Momentum was taken over by Entertainment One in January 2014.

<sup>4</sup> Top 10 total refers to the top 10 distributors of that particular year.

Tables 3 and 4 show the top 10 distributors of foreign language films and independent UK titles released in the UK and Republic of Ireland in 2019. (In total, 764 films were released theatrically in 2019.)

Foreign language films accounted for 45% of releases at the UK box office in 2019, grossing a total of £29 million (2% of overall box office). The high volume of foreign language releases is reflected by the number of companies in the UK handling such titles: 96 different distributors released non-English language films in the year. As Table 3 shows, the top 10 distributors associated with these films released 69 (20%) of the total 346 foreign language titles. These films generated £17.2 million which equates to 59% of the overall box office for foreign language films.

Hindi, Punjabi and Tamil were the most popular non-English languages for films released in the year, so companies releasing titles from the Indian subcontinent – such as 20th Century Fox, Zee Studios, Cinestaan AA and Yash Raj Films – feature highly in the list. In addition to releasing seven Hindi language films, including *Kalank* (£1 million) and *Total Dhamaal* (£0.5 million), the top earning distributor in this category, 20th Century Fox, distributed the highest grossing foreign language film of the year *Pain and Glory* (in Spanish) which earned £1.5 million at the UK and Republic of Ireland box office. (For more on the year's top earning foreign language titles, see the Top films in 2019 chapter.)

**Table 3 Top 10 distributors of foreign language films in the UK and Republic of Ireland, 2019 (ranked by box office gross)**

Distributor	Number of foreign language films released in 2019	Average widest point of release	Box office gross (£ million)
20th Century Fox	8	94	4.1
Zee Studios	14	42	2.4
Cinestaan AA	8	49	2.2
Yash Raj Films	6	72	1.9
Phoenix	4	239	1.3
Picturehouse	4	54	1.3
Curzon Artificial Eye	12	23	1.1
National Amusements	2	111	1.1
Magnetes Pictures	11	104	0.9
Sun Media	15	17	0.9

Source: Comscore, BFI RSU analysis

In total, 75 distributors released independent UK films in 2019, generating a combined box office gross of £168 million (13% of the total box office) from 168 releases. The 49 films released by the top 10 distributors of independent UK titles accounted for £162 million, which equates to 96% of the box office generated by these films (Table 4). Universal had the largest share of box office for UK independent films with earnings of £52 million from four titles, which included the year's top earning UK independent film *Downton Abbey*

(£28 million) and two other top 10 UK independent titles, *Yesterday* (£14 million) and *Mary Queen of Scots* (£9 million). Entertainment One and Altitude had the highest number of releases in this category with nine each. Entertainment One's top earning UK independent film release was *Stan & Ollie* (£11 million), while Altitude's top earning UK independent title was *Horrible Histories: The Movie - Rotten Romans* (£3 million).

**Table 4 Top 10 distributors of UK independent films in the UK and Republic of Ireland, 2019 (ranked by box office gross)**

Distributor	Number of UK independent films released in 2019	Average widest point of release	Box office gross (£ million)
Universal	4	554	51.8
20th Century Fox	6	492	32.9
Entertainment One	9	410	25.6
Lionsgate	7	359	20.7
StudioCanal	6	220	10.5
Entertainment Film Distributors	3	386	8.8
Altitude	9	115	5.2
Paramount	1	311	4.5
Vertigo	3	89	1.3
Sony	1	254	1.1

Source: Comscore, BFI RSU analysis



## WIDTH OF RELEASE

Table 5 shows the number and share of films released in the UK and Republic of Ireland from 2015 to 2019 by widest point of release (WPR). While the number of releases has fluctuated across the period, each year around three quarters of all films were released at fewer than 100 sites and around two thirds of films were released at fewer than 50 sites. There has been a downward trend in the share of films released at 200-599 sites but an upward trend in the share of films released at 100-199 sites and 600 sites or over. In 2019, eight titles including *Star Wars: The Rise of Skywalker* (WPR of 746), *Downton Abbey* (WPR of 741) and *The Lion King* (WPR of 725) were released at over 700 sites compared with only two in 2018.

**Table 5 Number and share of releases by widest point of release, 2015-2019**

	2015		2016		2017		2018		2019	
Sites at widest point of release	Number of releases	% of releases	Number of releases	% of releases	Number of releases	% of releases	Number of releases	% of releases	Number of releases	% of releases
>=600	6	0.8	21	2.6	29	3.8	15	1.9	38	5.0
500-599	40	5.3	40	4.9	34	4.5	43	5.5	34	4.5
400-499	50	6.6	45	5.5	33	4.3	40	5.1	32	4.2
300-399	33	4.3	19	2.3	24	3.2	22	2.8	26	3.4
200-299	22	2.9	18	2.2	24	3.2	29	3.7	16	2.1
100-199	41	5.4	59	7.2	53	7.0	53	6.7	58	7.6
50-99	52	6.9	58	7.1	79	10.4	82	10.4	77	10.1
10-49	236	31.1	244	29.7	224	29.5	224	28.5	256	33.5
<10	279	36.8	317	38.6	260	34.2	279	35.5	227	29.7
<b>Total</b>	<b>759</b>	<b>100.0</b>	<b>821</b>	<b>100.0</b>	<b>760</b>	<b>100.0</b>	<b>787</b>	<b>100.0</b>	<b>764</b>	<b>100.0</b>

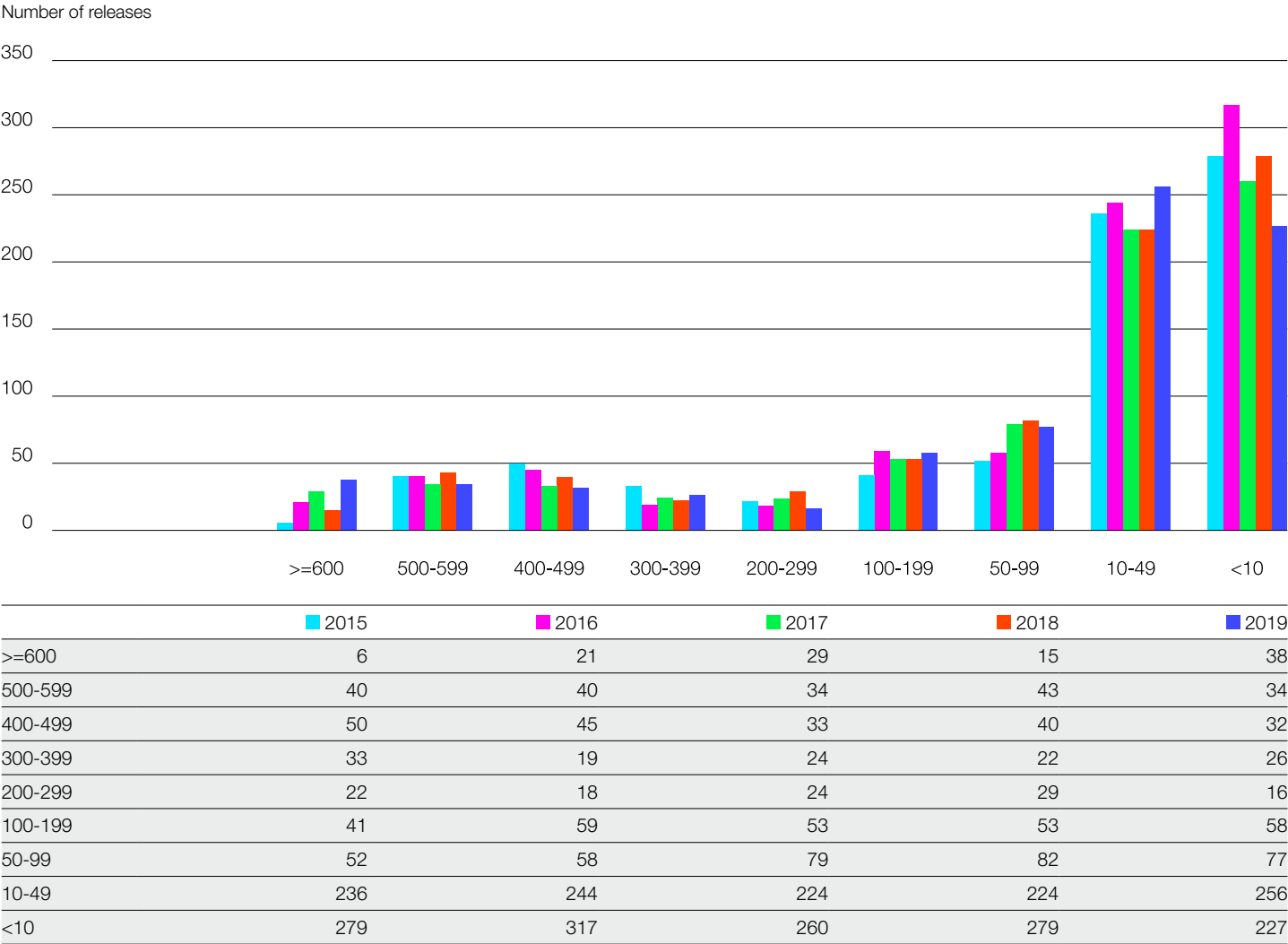
Source: Comscore, BFI RSU analysis

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



Figure 1 shows that between 2015 and 2019 more films were shown at fewer than 50 sites at their widest point of release than at any of the higher WPR bands. For the first time since our records began, in 2019 more films were released at 10-49 sites (256) than were released at less than 10 sites (227). The chart shows the declining numbers of releases at WPR bands between 200 and 499 sites. In 2019, the numbers of films released at 200-299 sites (16) and 400-499 sites (32) were the lowest since our records began.

Figure 1 Number of releases by widest point of release, 2015-2019



Source: Comscore

## WEEKEND BOX OFFICE

In 2019, 59.5% of box office revenue was taken during weekends (Friday to Sunday), up slightly from 59% in 2018 (Table 6). The pattern of box office takings by day has remained largely consistent throughout the decade covered in the table with the exception of the middle of the working week, which was boosted for the first five years by the 'Orange/EE Wednesdays' promotion. Since the end of this promotion in February 2015, the box office share has been more evenly distributed across weekdays, although the subsequent 'Meerkat Movies' promotion, which offers two-for-one tickets on Tuesdays and Wednesdays, is likely to be responsible for some of the increase seen in Tuesday attendances.

**Table 6 Box office percentage share by weekday/weekend 2010-2019**

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Friday	16.0	16.6	16.4	15.8	15.3	15.3	16.1	15.7	15.5	15.3
Saturday	24.1	23.8	24.1	24.9	25.2	23.9	24.6	24.7	24.1	24.6
Sunday	18.5	17.6	17.6	18.2	18.8	18.8	18.3	18.9	19.1	19.6
<b>Weekend</b>	<b>58.6</b>	<b>57.9</b>	<b>58.1</b>	<b>58.9</b>	<b>59.2</b>	<b>58.1</b>	<b>58.9</b>	<b>59.2</b>	<b>58.7</b>	<b>59.5</b>
Monday	9.5	9.2	9.3	8.9	9.1	9.5	9.7	8.7	9.6	9.6
Tuesday	9.3	9.1	9.3	9.4	9.4	10.6	10.4	10.3	10.0	10.1
Wednesday	13.2	13.9	13.4	12.6	12.4	10.8	10.9	11.3	11.2	10.0
Thursday	9.3	9.8	9.8	10.2	9.8	10.9	10.1	10.6	10.6	10.9
<b>Weekday</b>	<b>41.4</b>	<b>42.1</b>	<b>41.9</b>	<b>41.1</b>	<b>40.8</b>	<b>41.9</b>	<b>41.1</b>	<b>40.8</b>	<b>41.3</b>	<b>40.6</b>
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: Comscore

Note: Percentages may not sum to weekend/weekday sub-totals due to rounding.

For many films the opening weekend box office represents a significant proportion of their final theatrical gross. In 2019, 29% of total theatrical revenue was generated during opening weekends (Table 7). The table illustrates that the highest earning films generally take the lowest share of overall box office during their opening weekend. Four of the top 10 films released in 2019 took 22% or less of their final gross during their opening: *The Lion King* (22%), *Joker* (22%; to 20 February 2020), *Toy Story 4* (20%) and *Aladdin* (19%). The biggest film of the year, however, *Avengers: Endgame*, generated 49% of its total box office during its four-day opening. (Its opening gross of £43.4 million set a new UK all-time box office record overtaking the £41.3 million earned by *Spectre* when it opened in 2015.)

**Table 7 Opening weekend as percentage of total box office, by box office band, 2010-2019**

Range of box office (£ million)	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
>30	27.4	29.4	27.0	24.0	27.1	32.2	27.2	26.5	26.9	30.1
20-30	35.8	22.6	22.4	30.9	21.9	25.9	28.0	33.3	24.7	24.7
10-19.9	26.1	27.6	24.6	27.6	30.9	25.6	29.1	28.5	25.3	24.8
5-9.9	26.7	26.2	26.1	28.4	25.9	28.7	32.2	33.2	29.5	28.7
1-4.9	30.4	32.2	31.8	32.1	30.3	32.3	33.1	32.1	34.5	31.0
0.2-0.9	31.9	35.5	37.7	37.0	36.7	37.3	37.7	35.1	35.6	39.1
<0.2	34.8	38.5	37.8	38.3	40.0	39.6	39.6	41.4	41.6	43.9
<b>All films</b>	<b>28.6</b>	<b>28.1</b>	<b>26.8</b>	<b>28.4</b>	<b>27.9</b>	<b>29.9</b>	<b>29.8</b>	<b>29.9</b>	<b>27.9</b>	<b>28.9</b>

Source: Comscore

Note: Opening weekends include preview figures. For films with a limited initial opening, the wider release figure is included in the analysis.

## FILM ADVERTISING

The opening weekend is recognised as being crucial to the success of a film, both in cinemas and on subsequent release platforms. A good opening weekend, for example, may encourage exhibitors to continue to screen a film, and is likely to have a positive impact on the rest of the value chain. This is particularly important for independent films which do not have the backing of the major studios. Distributors invest heavily in advertising across all media (television, outdoor, print, radio and digital) in order to raise a film's profile with potential audiences.

Nielsen estimates that the total advertising spend by distributors in 2019 was £201 million, up 2% from £197.5 million in 2018 (Table 8). Overall expenditure on traditional media (television, outdoor, print and radio) was £161 million, an increase of 5% on 2018. This was driven, however, by an increase in spend in only two categories: outdoor and radio advertising expenditure increased by 33% and 28% respectively compared with 2018, while spend on both press and television decreased by 15%.

The Nielsen data indicate a fall in advertising spend on digital media in 2019 compared with 2018. It should be noted that the data for digital advertising only cover desktop/mobile display and pre-roll advertising; they do not include estimates for advertising on social media platforms or websites that require a log-in, search advertising or pay-per-click. The value of internet advertising as reported in the table represents 20% of the total advertising spend for film in 2019. However, as the data for this category is not wholly comprehensive, we believe this share to be an underestimate.

**Table 8 Estimated advertising spend 2010-2019 (£ million)**

Medium	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
TV	76.0	90.8	89.1	89.2	101.0	102.2	93.3	81.1	79.2	67.2
Outdoor	61.0	69.1	67.2	71.2	64.2	60.5	52.8	56.5	54.9	73.1
Press	19.9	22.0	21.5	20.7	24.2	21.3	14.9	14.0	10.8	9.2
Radio	7.6	6.8	6.8	5.9	4.6	7.4	5.7	12.1	8.7	11.1
<b>Sub-total</b>	<b>164.5</b>	<b>188.7</b>	<b>184.6</b>	<b>187.0</b>	<b>194.0</b>	<b>191.4</b>	<b>166.7</b>	<b>163.7</b>	<b>153.6</b>	<b>160.6</b>
Digital*	6.1	8.5	4.0	2.5	1.1	0.7	46.4	65.5	43.7	40.5
<b>Total</b>	<b>170.6</b>	<b>197.2</b>	<b>188.6</b>	<b>189.4</b>	<b>195.1</b>	<b>192.1</b>	<b>213.1</b>	<b>229.5</b>	<b>197.5</b>	<b>201.1</b>

Source: Nielsen Media Research

Notes:

Figures may not sum to totals due to rounding.

\* The figures for 2014 onwards are not historically comparable; different methodologies were used for internet advertising spend for the periods 2010-2013, 2014-2015 and 2016-2019.

Table 9 shows the share of advertising spend on traditional media only from 2010 to 2019. It does not include digital advertising activity due to the reporting limitations described above.

Over the period, the majority of advertising spend on traditional media has been allocated to TV and outdoor advertisements. These two categories accounted for over 80% of traditional media advertising spend each year, with TV taking the largest share of the two, with the exception of 2019, when the share of spend on TV advertising was 42% compared with 45.5% for outdoor advertising. The share of spend on press advertising has been on an overall downward trend over the period, due in part to falling newspaper and magazine circulations, decreasing from 12% in 2010 to 6% in 2019. Conversely, the share of advertising spend on radio has seen an overall increase during the period, despite a more fluctuating trend line, rising from 5% in 2010 to 7% in 2019, when the percentage of advertising spend on radio was greater than for press for the first time since our records began.

**Table 9 Share of traditional media advertising spend, 2010-2019**

Medium	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
TV	46.2	48.1	48.3	47.7	52.1	53.4	56.0	49.5	51.6	41.8
Outdoor	37.1	36.6	36.4	38.1	33.1	31.6	31.7	34.5	35.7	45.5
Press	12.1	11.7	11.6	11.1	12.5	11.1	8.9	8.6	7.0	5.7
Radio	4.6	3.6	3.7	3.2	2.4	3.9	3.4	7.4	5.7	6.9
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: Nielsen Media Research

Notes:

See notes to Table 8.

Figures may not sum to totals due to rounding.





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