



THE BOX OFFICE 2021

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FACTS IN FOCUS

The cinema sector in the UK showed significant signs of recovery in 2021. While still below pre-pandemic levels, there was a strong upturn in both ticket sales and box office receipts during the year.

- UK cinema admissions reached 74 million in 2021, up 68% on 2020 (44 million), but down from 176 million in 2019.
 - UK box office receipts were £542 million, up from £307 million in 2020, but down from £1.25 billion in 2019.
 - A total of 442 films were released for a week or more in the UK and Republic of Ireland, up from 381 films in 2020 (764 in 2019).
 - UK films, including co-productions, accounted for 30% of releases and 41% of the market by value.
 - The box office share of UK independent films was 5%, down from 14% in 2020.
 - The top 100 films earned almost 98% of the gross box office.
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The box office

2021

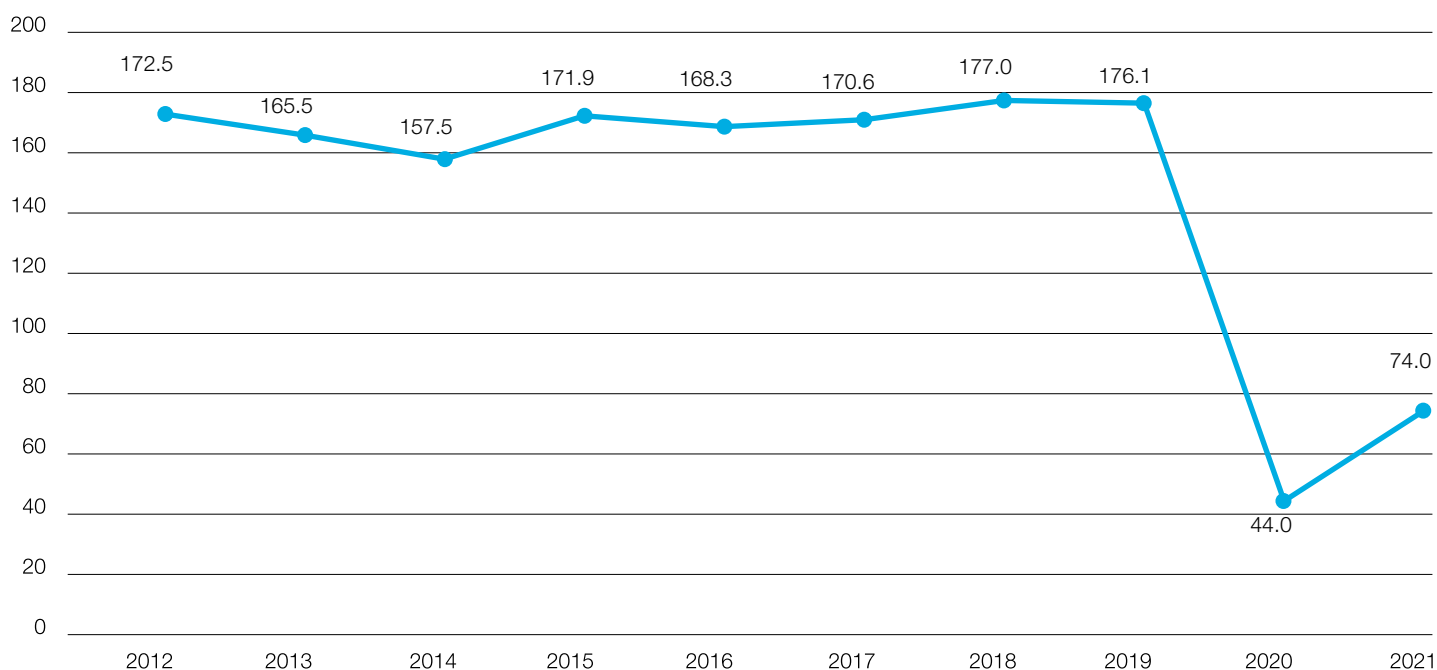
Admissions

Despite months of closures at the start of the year and subsequent restrictions in the form of capacity limits and rules on social distancing, cinemas enjoyed significantly greater audience numbers in 2021 than in 2020.

Admissions for the year totalled 74 million, up 68% compared with 2020, but still well below the level of attendances seen in 2019 (Figure 1).

Figure 1 Annual UK cinema admissions, 2012-2021

Number of admissions (million)



Total admissions

Source: Cinema Advertising Agency (CAA), Comscore

Note: Annual admissions include those to event cinema screenings.

Table 1 shows admissions data for the largest world and European film markets between 2019 and 2021. As with the UK, the majority of territories saw increased attendances in 2021 in comparison with 2020 but cinema-going in every territory remained well below the level of admissions in 2019. The two territories reporting numbers of ticket sales in 2021 closest to those of 2019 were China (down only 32%) and Russia (-34%) while those with the greatest shortfall between 2019 and 2021 were Indonesia (-82%), Italy (-74%) and South Korea (-73%).

According to Omdia, global cinema admissions in 2021 totalled 3.3 billion, an increase from 1.9 billion in 2020, but still 57% down on the 7.6 billion recorded in 2019.

Table 1 Largest film markets by admissions, 2019-2021 (ranked by 2021 admissions)

Territory	Admissions 2019 (million)	Admissions 2020 (million)	Admissions 2021 (million)	+/- 2019 (%)
China	1,727	548	1,167	-32.4
USA	1,163	226	466	-59.9
India	1,460	225	427	-70.8
Russia	219	89	146	-33.6
Japan	195	106	115	-41.1
Mexico	350	65	114	-67.6
France	209	64	94	-55.1
UK	176	44	74	-57.9
South Korea	227	60	61	-73.3
Brazil	176	39	51	-71.3
Germany	119	38	42	-64.5
Spain	105	29	41	-60.9
Poland	61	17	29	-52.4
Indonesia	140	31	25	-82.1
Italy	98	28	25	-74.4

Source: Omdia

Note: Includes all global territories with more than 50 million admissions and all European territories with more than 25 million admissions in the calendar year 2021.

Table 2 shows UK cinema admissions by month between 2019 and 2021. The figures show both the shortfall in admissions in comparison with the pre-pandemic totals of 2019 and the year-on-year recovery in attendances seen during some months in 2021. It should be noted, however, that following the re-opening of cinemas in the UK in late spring 2021, one or more restrictions (such as mask wearing, social distancing, capacity limits and mandatory vaccine passports) were in operation in some or all parts of the country for the remainder of the year. (Cinemas began reopening in England, Scotland and Wales from 17 May, and in Northern Ireland from 24 May.)

The first film to top the UK box office charts when cinemas reopened in 2021 was the family-friendly *Peter Rabbit 2: The Runaway* which grossed £4.6 million (in the UK and Republic of Ireland) on its seven-day opening. (Its Friday to Sunday total of £3.8 million was the biggest three-day opening gross in the territory since *Sonic the Hedgehog* which earned £4.7 million for its three-day debut in February 2020.) The film was one of three top 20 titles released in May and heralded a summer dominated by action, adventure and comedy titles which attracted

younger audiences in particular back to cinemas. After May opens *Cruella* (a UK qualifying film) and the US horror title *The Conjuring: The Devil Made Me Do It*, top 20 earners in the summer included UK studio-backed titles *Black Widow* and *Fast & Furious 9*, along with *Space Jam: A New Legacy*, *The Suicide Squad*, *Jungle Cruise*, *The Croods: A New Age* and *Free Guy*. Top grossing UK independent films released in the summer included the year's second highest earning UK independent title, *The Hitman's Wife's Bodyguard* alongside *The Father*, *The Courier* and *People Just Do Nothing: Big in Japan*.

Admissions rose each month between May (3.5 million) and August (10.4 million) but fell in September to 6.5 million. Traditionally one of the slowest months for ticket sales, September did, however, see the opening of the year's fourth highest earning release *Shang-Chi and the Legend of the Ten Rings*. The superhero blockbuster, the 25th film in the Marvel Cinematic Universe and the first to feature an Asian lead, had the largest opening weekend of the year thus far with a three-day gross of £5.8 million.

Shang-Chi's three-day record was soon overtaken by the debut of another official 25th outing. The much delayed 007 instalment, *No Time to Die*, originally scheduled for release in April 2020, grossed £21 million on its three-day opening (£25.8 million including Thursday previews), the highest Friday to Sunday tally for a Bond film ever in the UK and Republic of Ireland. Officially released on 1 October, *No Time to Die* would go on to become the UK's third highest ever release with a gross of £97 million and was the first film of the year to entice substantial numbers of older audience members back to the cinema. Alongside three other top 20 earners – *Dune*, the UK studio-backed title *Venom: Let There Be Carnage* and *The Addams Family 2* – and the top earning UK independent film of the year, *The French Dispatch*, *No Time to Die* helped propel October's ticket sales to the highest total of the year at 16.4 million. October was the only month to see an increase in admissions compared with the equivalent month in 2019.

At 8.8 million, attendances in November were almost half the level of October but were still the fourth highest of the year. Releases in the month include three top 20 earners – *Ghostbusters Afterlife* and the UK studio-backed titles *Eternals* and *House of Gucci* – as well as the third highest grossing UK independent film of the year, *Spencer*. Admissions rose again in December, despite concerns around the discovery of the COVID Omicron variant. The biggest release of the month was *Spider-Man: No Way Home*, which would go on to become the second highest grossing release of the year and the all-time fourth highest earning film at the UK and Republic of Ireland box office with earnings (to 13 February 2022) of £93 million. Ticket sales for the month were also the second highest of the year, with total admissions of 13.5 million.

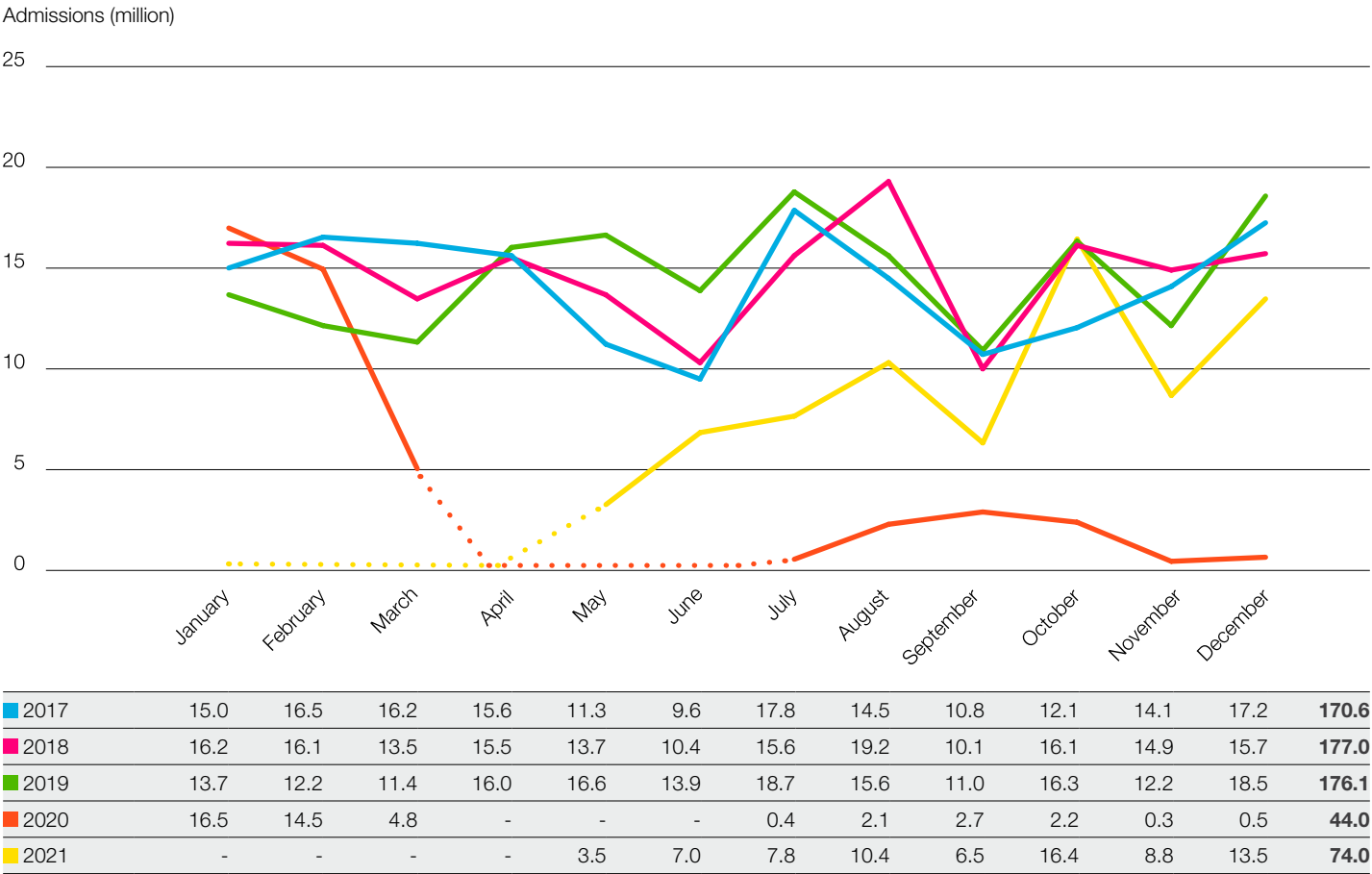
Table 2 Monthly UK cinema admissions, 2019-2021

Admissions (million)	2019	2020	2021	% change on 2019
January	13.7	16.5	-	-100.0
February	12.2	14.5	-	-100.0
March	11.4	4.8	-	-100.0
April	16.0	-	-	-100.0
May	16.6	-	3.5	-78.8
June	13.9	-	7.0	-49.9
July	18.7	0.4	7.8	-58.5
August	15.6	2.1	10.4	-33.1
September	11.0	2.7	6.5	-40.6
October	16.3	2.2	16.4	0.9
November	12.2	0.3	8.8	-27.5
December	18.5	0.5	13.5	-26.8
Total	176.1	44.0	74.0	-58.0

Source: CAA, Comscore

Figure 2 shows the level of recovery in cinema-going in 2021 with admissions in the second half of the year mirroring the pattern of previous years. In general, attendances are cyclical, peaking during the school and festival holiday periods when people have more time to go to the cinema.

Figure 2 Monthly UK cinema admissions, 2017-2021



Source: CAA

Table 3 shows how admissions in 2021 break down by the television advertising regions used by the Incorporated Society of British Advertisers (ISBA). The pattern of attendances by ISBA region in the year is broadly consistent with previous years, despite local variations in terms of pandemic restrictions following the reopening of cinemas from May onwards.

The UK's most populous region, London, accounted for the greatest share of admissions (23%) followed by the Midlands (12%) South and South East, and North West

(both with 11%). In terms of average admissions per head of population, cinema-going was highest in Northern Ireland, London and Central Scotland and lowest in the Midlands, Wales 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 been on a downward trend; it was 25.5% in 2013.

Table 3 Cinema admissions by ISBA TV region, 2021

Region	Admissions (million)	%	Population (million)	Admissions per person
London	16.9	22.8	13.7	1.2
Midlands	8.9	12.0	9.1	1.0
South and South East	8.5	11.4	7.7	1.1
North West	8.3	11.1	7.2	1.2
Yorkshire	6.6	9.0	6.5	1.0
East of England	5.6	7.6	5.0	1.1
Central Scotland	4.7	6.3	3.9	1.2
Wales	3.0	4.1	3.1	1.0
North East	2.9	4.0	2.8	1.1
West	2.5	3.4	2.5	1.0
Northern Ireland	2.5	3.4	1.9	1.3
South West	1.9	2.6	1.8	1.1
Northern Scotland	1.3	1.8	1.3	1.0
Border	0.4	0.6	0.6	0.7
Total	74.0	100.0	67.1	1.1

Source: CAA, Comscore

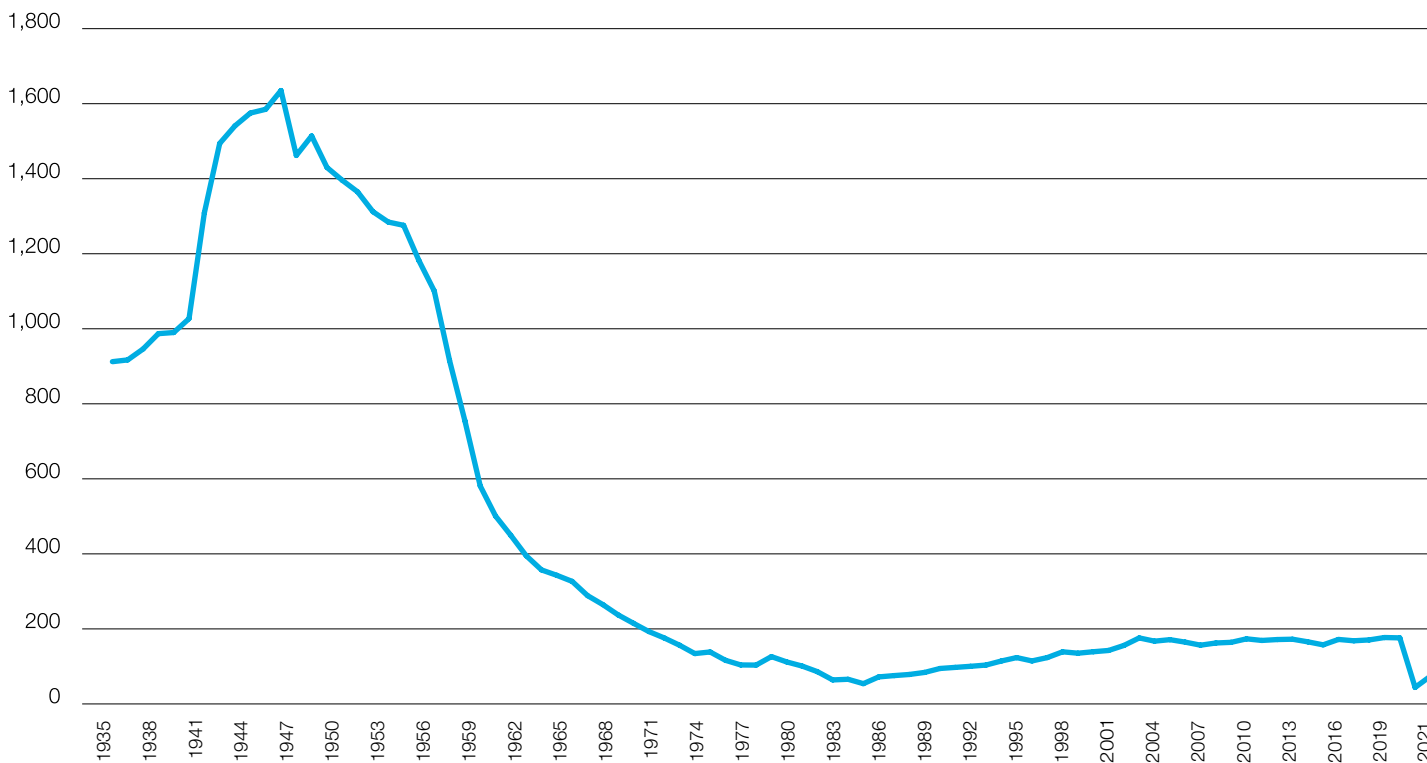
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Figure 3 puts UK admissions in a longer-term perspective. Along with the USA and other western European countries, cinema-going in the UK declined sharply in the post-war era as incomes rose and new leisure activities became available. The largest 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 popularisation of the VCR in the same decade had a further negative impact on attendances, and by 1984 ticket sales had plummeted to a 50-year low of

54 million. However, the introduction of multiplex cinemas to the UK from 1985 onwards began to reverse the trend and ushered in a new period of growth which saw admissions gradually returning to levels last seen in the early 1970s. In the decade prior to the COVID-19 pandemic (2010-2019) attendances topped 170 million in six different years, peaking in 2018 with the highest admissions since 1970. The onset of the pandemic in the UK in 2020 caused massive disruption to the cinema sector: admissions for the year fell to an all-time low of 44 million. While the impact of the pandemic continued into 2021, admissions began to recover with total tickets sales for the year up by more than two-thirds compared with 2020.

Figure 3 Annual UK admissions, 1935-2021

Admissions (million)



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
2020	44.0
2021	74.0

Source: BFI, CAA, Comscore

UK box office earnings

According to Comscore, the total UK box office gross for 2021 was £542 million. This figure covers all box office earnings during the calendar year 2021 for films exhibited in the UK whose box office takings were tracked by Comscore. While still below the level of recent pre-pandemic box office earnings, the overall gross for 2021 was 76.5% greater than in 2020.

Table 4 UK box office trends, 2012-2021

Year	Box office gross (£ million)	Change on previous year %	Change since 2012 %
2012	1,099	5.7	-
2013	1,083	-1.5	-1.5
2014	1,063	-1.8	-3.3
2015	1,242	16.8	13.0
2016	1,228	-1.1	11.7
2017	1,279	4.2	16.4
2018	1,282	0.2	16.7
2019	1,254	-2.2	14.1
2020	307	-75.5	-72.1
2021	542	76.5	-50.7

Source: Comscore

Note: Box office for all titles on release in the UK only, including event cinema grosses.



Image: Shang-Chi and the Legend of the Ten Rings © Marvel Studios 2021. All Rights Reserved.

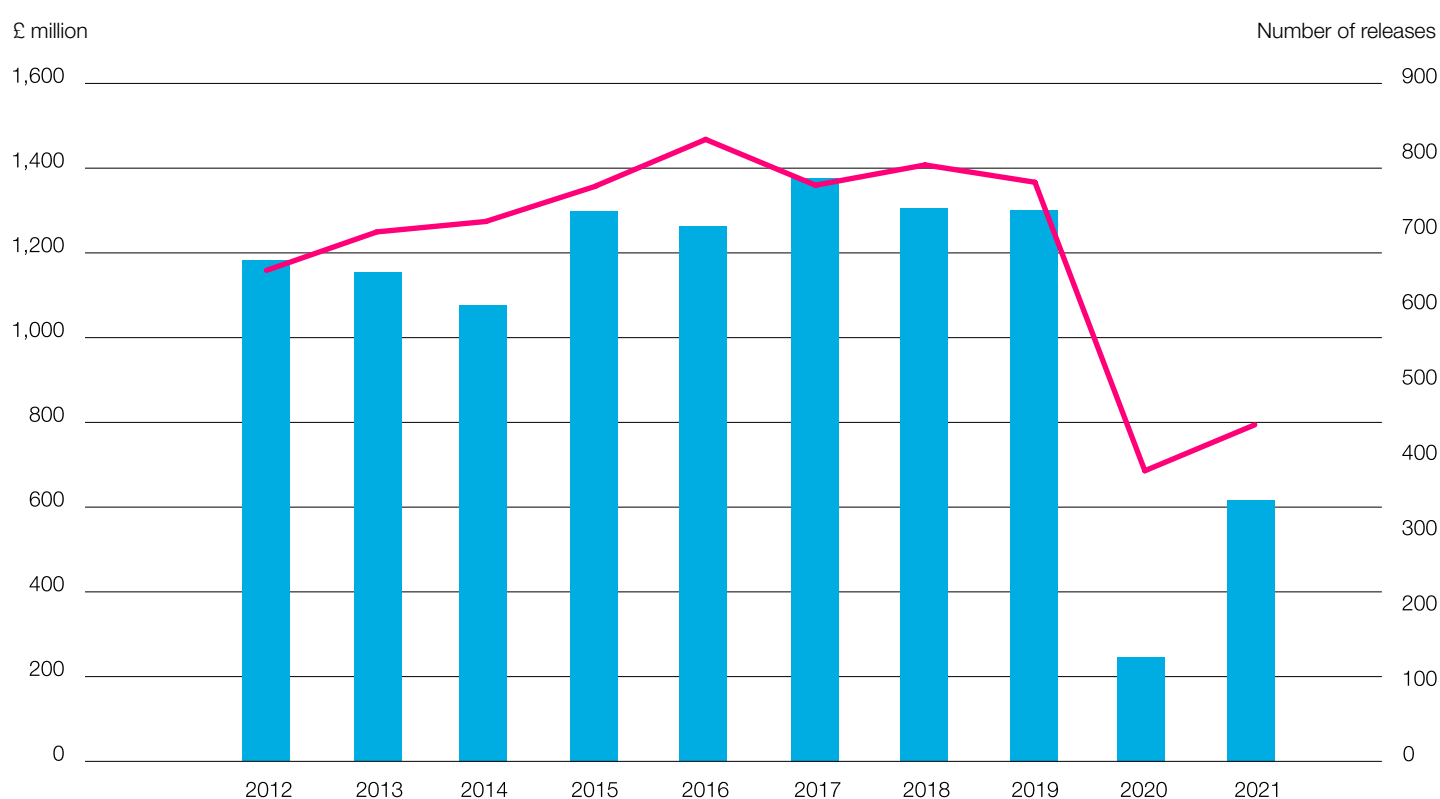
Film releases and box office revenues in the UK and Republic of Ireland

In 2021, 442 films were released for a week or more in the UK and Republic of Ireland, an increase from 381 in 2019, but below the average of over 700 releases seen between 2012 and 2019 (Figure 4). These films generated

£616 million in box office revenues, up from £247 million in 2020, but less than half the box office total generated in 2019 (£1.3 billion). The figure of £616 million differs from the £542 million in the previous section because it includes revenues generated in 2022 by films released in 2021 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 covers all titles released in 2021 (excluding event cinema releases) and includes revenues generated up to 13 February 2022.

The box office recovery in 2021 is underscored by the increase in average earnings for film releases, which rose from £600,000 in 2020 to £1.4 million.

Figure 4 Revenues and releases at the UK and Republic of Ireland box office, 2012-2021



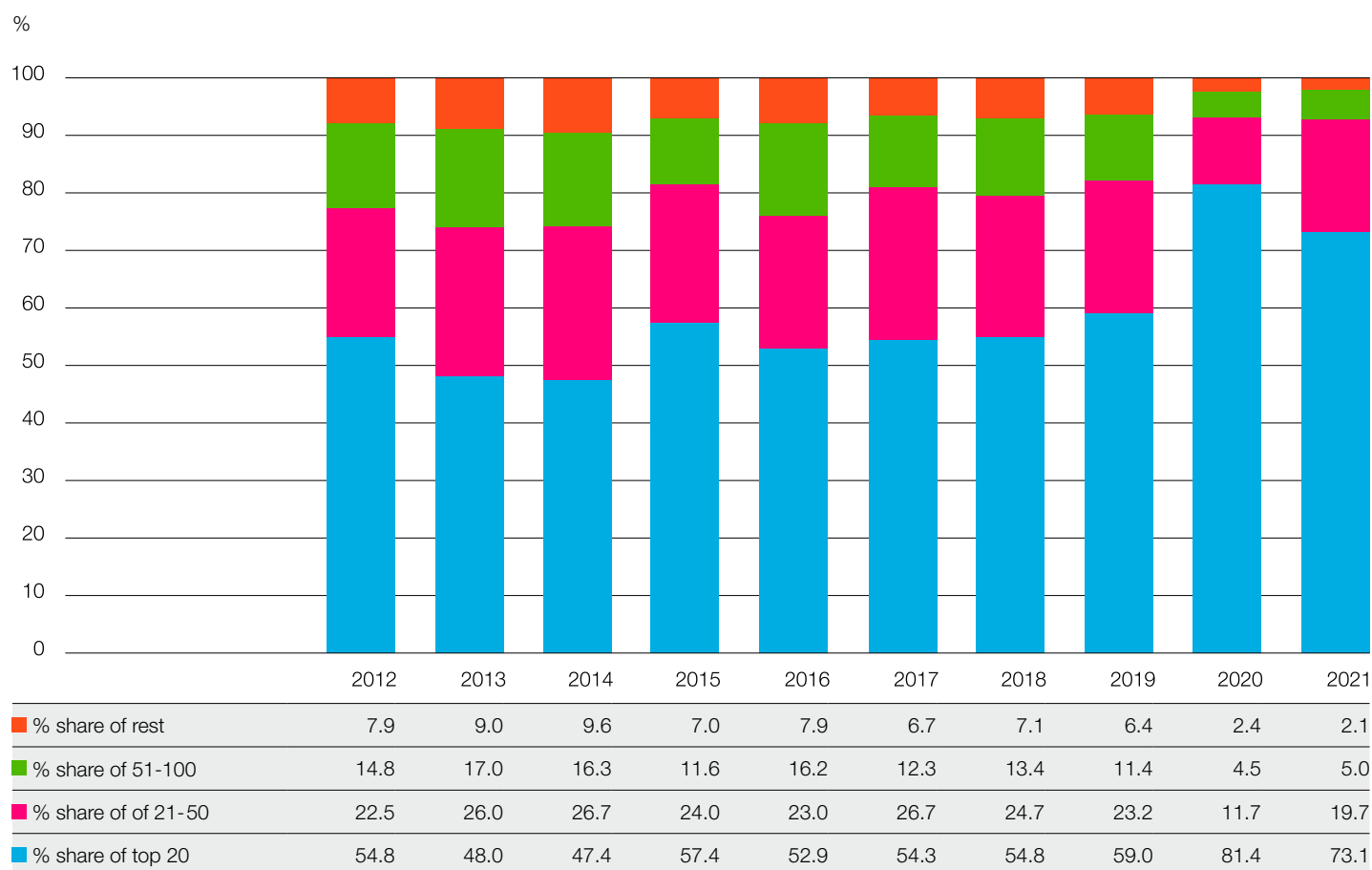
Box office gross (£ million)	1,182.4	1,153.7	1,077.8	1,298.4	1,262.0	1,376.9	1,304.8	1,300.9	246.9	616.2
Number of releases	647	698	712	759	821	760	787	764	381	442
Average revenue per release (£ million)	1.8	1.7	1.5	1.7	1.5	1.8	1.7	1.7	0.6	1.4

Source: Comscore, BFI RSU analysis

Note: Figure 4 and all subsequent analysis of the theatrical market includes all titles released in 2021 excluding event cinema. The combined gross reflects the territorial gross (i.e. including the Republic of Ireland), and includes those titles released in 2021 but also generating revenue into 2022, up to and including 13 February 2022.

The market share of the top 50 highest grossing films was relatively stable between 2012 and 2019 accounting on average for around 75%- 80% of box office revenues (Figure 5). In both 2020 and 2021, however, the box office share of the top 50 films was 93%, indicating the strength of performance from the major releases in these years. At just under 98%, the box office share of the top 100 films in 2020 and 2021 was the highest since our records began.

Figure 5 Market share of top 20, 21-50, 51-100 and rest of films, 2012-2021



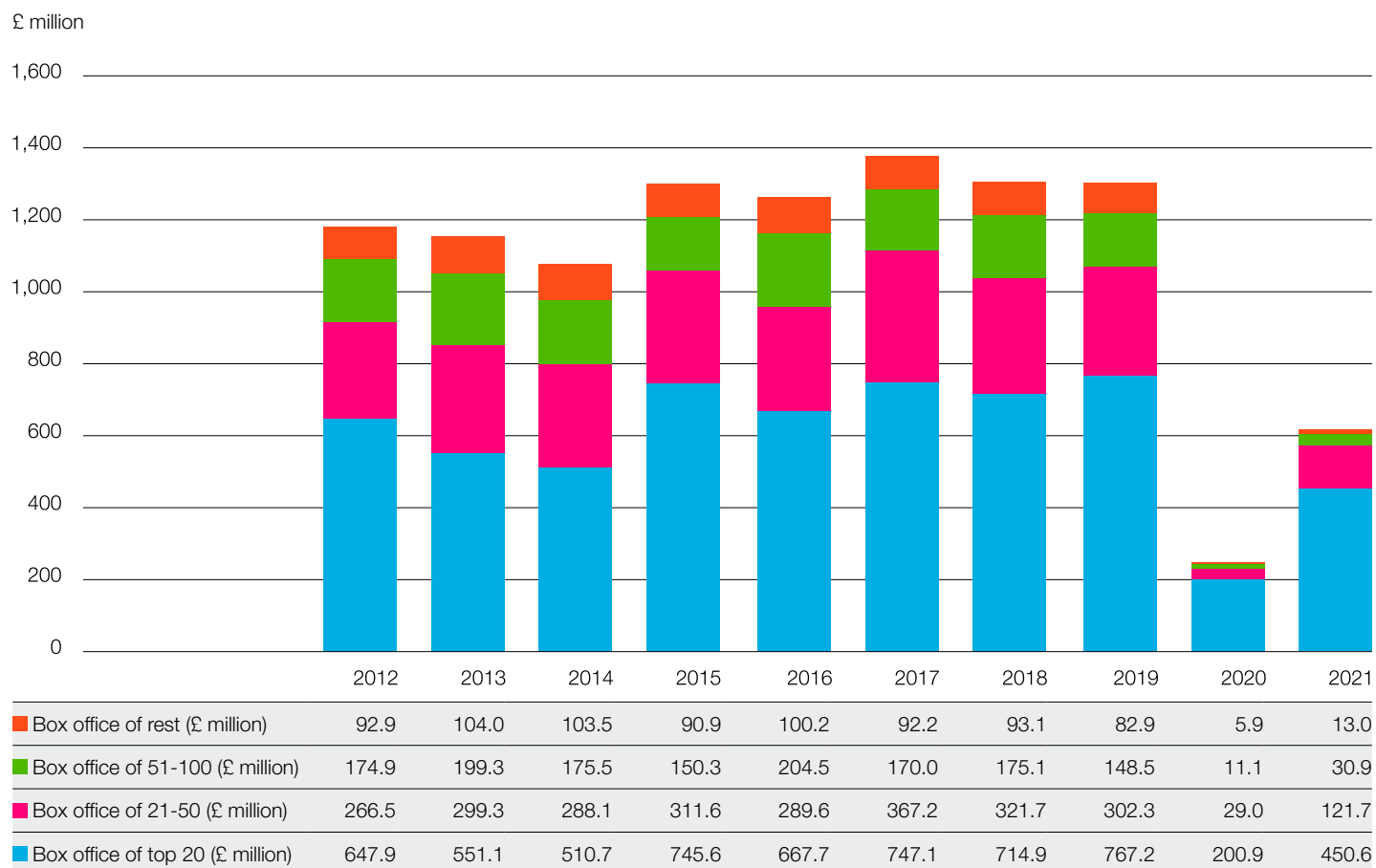
Source: Comscore, BFI RSU analysis

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

Figure 6 illustrates the negative impact of the pandemic on box office earnings in both 2020 and 2021. It does, however, show an uptick in 2021 compared with 2020. The top 20 films in 2021 grossed £451 million, more than double the take for the top 20 earners in 2020 (£210 million). The films ranked 21-50 earned £122 million

in 2021, a substantial increase on 2020's total (£29 million), while those ranked 51-100 earned £31 million, up from £11 million in 2020. The combined box office of all films outside the top 100 was £13 million in 2021, up from £6 million in 2020.

Figure 6 Gross box office of top 20, 21-50, 51-100 and rest of films, 2012-2021



Source: Comscore, BFI RSU analysis

The slump in box office earnings caused by the pandemic is underscored by Table 5 which shows the drop in median earnings for all films outside the top 100 in 2020 and 2021.

Table 5 Releases and revenues of films outside the top 100, 2012-2021

	Number of films	Gross box office (£ million)	Median box office (£)
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
2020	281	5.9	8,948
2021	342	13.0	13,003

Source: Comscore, BFI RSU analysis

Widest point of release

Table 6 shows the number of films released in the UK and Republic of Ireland in 2021 by the number of sites at the widest point of release (WPR). A total of 149 films were shown at 100 sites or over (34% of all films released) while 107 films were shown at fewer than 10 sites (25% of all films released). Two-thirds of all films released in 2021 were shown at fewer than 100 sites.

Table 6 Number of releases and median box office gross by number of sites at widest point of release, 2021

Number of sites at WPR	Number of releases	% of releases	Median box office (£)	Minimum box office (£)	Maximum box office (£)
≥600	32	7.2	10,139,903	2,052,828	96,665,491
500-599	15	3.4	2,341,029	556,092	9,569,197
400-499	16	3.6	1,212,124	490,034	2,677,765
300-399	20	4.5	513,457	75,861	4,160,505
200-299	18	4.1	197,401	26,116	830,970
100-199	48	10.9	74,940	5,768	904,164
50-99	41	9.3	88,932	3,245	469,899
10-49	145	32.8	16,565	391	468,153
<10	107	24.2	2,308	26	39,080
Total	442	100.0	22,275	26	96,665,491

Source: Comscore, BFI RSU analysis

Country of origin of film releases

As Table 7 shows, 30% (25% in 2020) of all films released in the UK and Republic of Ireland in 2021 were UK qualifying films (including co-productions). These films accounted for 41% of total box office gross, of which UK independent films earned 5% and UK studio-backed titles earned 36%. Films originating from the USA

(excluding UK co-productions) represented 29% of releases (up from 28% in 2020) and accounted for 56% of total box office gross.

Films originating outside the UK and USA accounted for 41% of releases (down from 47% in 2020) and 4% of earnings (down from 11% in 2020). Films from non-UK European countries represented 21% of all releases and 1.1% of revenues. Films from India accounted for 0.6% of total box office from 11% of releases, and films from the rest of the world accounted for 2% of total box office from 10% of releases.

Table 7 Country of origin of films released in the UK and Republic of Ireland, 2021

Country of origin	Number of releases	% of all releases	Box office gross (£ million)	% of total box office
USA	128	29.0	342.4	55.6
UK (studio-backed*)	18	4.1	221.0	35.9
UK (independent)	114	25.8	30.4	4.9
All UK	132	29.9	251.3	40.8
Other Europe	92	20.8	6.7	1.1
India	47	10.6	3.7	0.6
Rest of the world	43	9.7	12.1	2.0
Total	442	100.0	616.2	100.0

Source: Comscore, BFI RSU analysis

Notes:

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.

The changes in market share for films by country of origin between 2012 and 2021 are shown in Figure 7. A 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. When combined, the share for these two categories of film ranged between 84%-87% for the majority of the

period but was as low as 76.5% in 2014 and 74% in 2020. The main reason for the lower figures in these years was the increased share achieved by UK independent releases (16% in 2014; 14% in 2020). In 2021, the aggregate share of USA-only and UK studio-backed films was at a period high of 91.5%.

Figure 7 Market share by country of origin, 2012-2021

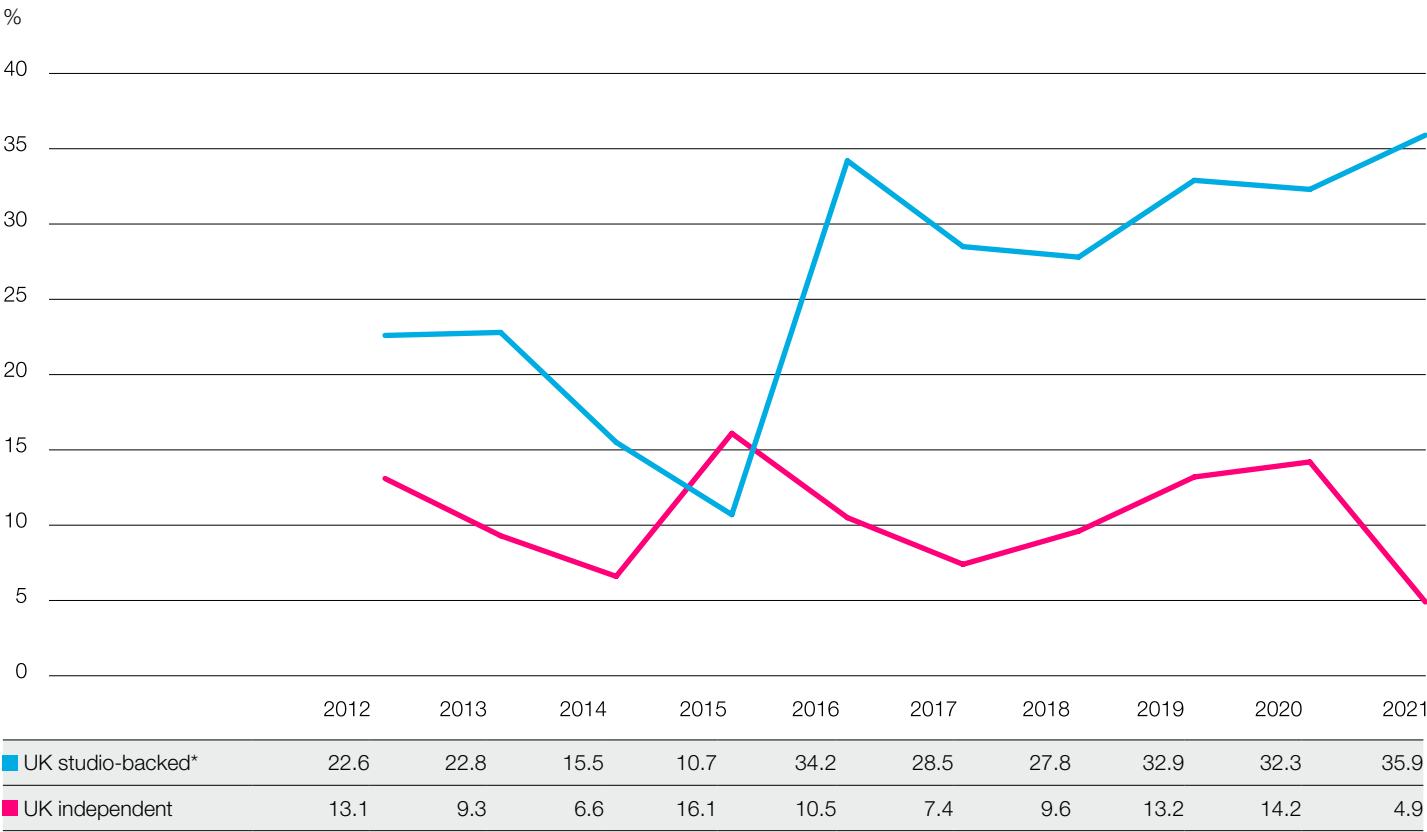


Source: Comscore, BFI RSU

* '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 total generally dependent on a small number of high grossing titles. The average share for UK independent films between 2012 and 2021 was 10.5%. In 2021, however, the share was just under 5%, the lowest of the period. Conversely, at over 36%, the market share for UK studio-backed films in 2021 was the highest since our records began. Half of the top 10 earning films in the year were UK studio-backed titles, including *No Time to Die* (£97 million), *Black Widow* (£19 million) and *Venom: Let There Be Carnage* (£18 million).

Figure 8 UK films’ share of the UK theatrical market, 2012-2021



Source: Comscore, 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 from 2012 to 2021. On average, in the years prior to the pandemic (2012-2019), between 77%-80% of all UK films earned less than £1 million at UK and Republic of Ireland cinemas. In 2020, this share had risen to 92% but fell to 85% in 2021. In both 2020 and 2021, 4% of UK films earned £10 million or over, the lowest share since 2014, and only one UK title in each year earned over £20 million, both of which were the top earning releases of the year: *1917* (£44 million) in 2020 and *No Time to Die* (£97 million) in 2021.

Table 8 UK qualifying releases by box office band, 2012-2021 (£ million)

		≥20	10 – 19.99	5 – 9.99	1 – 4.99	0.1 – 0.99	<0.1	Total
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
2020	Number	1	3	2	2	18	70	96
	%	1.0	3.1	2.1	2.1	18.8	72.9	100.0
2021	Number	1	4	5	10	27	85	132
	%	0.8	3.0	3.8	7.6	20.5	64.4	100.0

Source: Comscore, BFI RSU analysis

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



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