DISTRIBUTION

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FACTS IN FOCUS

There was a welcome recovery in the theatrical marketplace in the UK and Republic of Ireland in 2021. In total, distributors handled 981 feature films compared with 926 in 2020. The top 10 distributors handled 44% of all releases and these films earned 97% of the total box office.

- The total box office for all films on release in the UK and Republic of Ireland in 2021 was £590 million, up from £311 million in 2020 (£1.3 billion in 2019).
- Films released by the top 10 distributors generated £571 million in box office revenues, while releases from the remaining distributors (137) made £19 million.
- Universal was the top earning distributor in 2021, with 51 films making £181 million at the UK and Republic of Ireland box office (including the top earning release of the year, *No Time to Die*, which grossed £97 million).
- Lionsgate was the top earning distributor of UK independent films released in 2021, with seven titles grossing £9 million.
- Sony was the top earning distributor of foreign language films released in 2021, with four titles grossing £2 million.
- In 2021, 56% of box office revenue was taken during weekends (Friday to Sunday), the lowest share in the past 10 years.

Distribution

Distributors

A strong recovery in the numbers of people choosing to watch films on the big screen made 2021 a more successful year for the distribution sector than 2020. Despite continued challenges from the COVID-19 pandemic, which saw all cinemas closed for the first five to six months of the year, a total of 981 films were on release theatrically during 2021, compared with 926 films in 2020 (1,154 in 2019). Cinemas reopened in England, Scotland and Wales from 17 May, in Northern Ireland from 24 May and in the Republic of Ireland from 7 June.

The top 10 feature film distributors had a 97% share of the market in 2021 from the release of 432 titles (44% of all films on release). The share is the highest since 2005 and up almost five percentage points from 2020, when the top 10 distributors had a market share of 92.5% from 392 releases (42% of all releases). A further 137 distributors were involved in the theatrical release of films in the UK and Republic of Ireland in 2021, compared with 143 companies outside the top 10 in 2020. These distributors handled a total of 549 titles (56% of all releases) but generated only 3% of the total box office.

Table 1 shows box office takings by distributor for all films on release in the UK and Republic of Ireland during 2021 (including titles released prior to 2021). The top earning distributor was Universal which released the highest earning film of the year *No Time to Die* alongside four other top 20 titles including *Fast & Furious 9* and *The Addams Family 2*. In total, titles released by Universal generated revenues of £181 million in 2021 (a 31% share of overall box office). The second highest earning distributor in 2021 was Sony which released four of the year's top 20 titles, including *Spider-Man: No Way Home, Peter Rabbit 2: The Runaway* and *Ghostbusters: Afterlife*. Sony releases earned £131 million in 2021, a 22% share of the box office.

The appearance in the top 10 of Park Circus, which specialises in classic and back catalogue titles, indicates the importance of older releases to cinemas during the two years most impacted by the pandemic. The newcomer to the list had 96 titles on release during 2021, the greatest number of any of the top 10 distributors.

Table 1 Distributor share of box office, UK and Republic of Ireland, all films on release 2021

Distributor	Market share in 2021 (%)	Films on release in 2021	Box office gross in 2021 (£ million)
Universal	30.6	51	180.8
Sony	22.2	52	130.8
Walt Disney	21.2	63	125.1
Warner Bros	14.4	80	84.7
Paramount	3.7	16	21.8
Lionsgate	1.8	23	10.5
Entertainment One	1.4	12	8.1
Park Circus	0.6	96	3.4
STX Entertainment	0.6	3	3.4
StudioCanal	0.5	36	2.7
Top 10	**96.8**	**432**	**571.2**
Other distributors (137)	3.2	549	19.0
Total	**100.0**	**981**	**590.2**

Source: Comscore
Notes:
The total here differs from Table 5 as it includes all films on release in 2021, including titles first released in 2020.
Box office gross = cumulative total for all films handled by the distributor in the period 1 January 2021 to 6 January 2022.
Figures may not sum to sub-totals/totals due to rounding.

Table 2 shows the top 10 distributors by market share between 2012 and 2021. Universal, the leading distributor of 2021, held the top spot in one other year during the period (2015), while Walt Disney, which was third in the list of top 10 earning distributors in 2021, has headed the top 10 chart on four occasions over the period (2016-2019), the highest number of any distributor. With one exception, the top spot has always been held by one of the major US studios. In 2020, however, for the only time since our records began, the leading place was held by an independent distributor: Entertainment One. (This was primarily due to the cancellation or postponement of many of the year's major Hollywood blockbusters.)

Seven different independent distributors have featured in the top 10 list since 2012. Both Lionsgate and Entertainment One have appeared each year while StudioCanal has featured nine times and Entertainment Film Distributors has featured eight times. More recent entrants to the top 10 are STX Entertainment which has appeared twice since 2019, Shear Entertainment which featured in 2020 and Park Circus which featured in 2021. The top earning independent distributor in 2021 was Lionsgate, whose highest grossing titles were *The Hitman's Wife's Bodyguard, The Father* and *The Courier*.

In 2020, partly as a result of the lack of studio output, the market share for distributors outside the top 10 was 7.5% (the highest share since 2009). In 2021, the share was 3% (the lowest share since 2005).

Table 2 Distributor market share as percentage of box office gross, 2012-2021 (ranked by 2021 market share)

Distributor	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Universal	10.7	15.1	11.2	21.6	14.0	16.0	19.5	13.9	12.5	30.6
Sony	18.0	8.7	6.2	11.8	6.6	10.3	10.7	9.3	15.6	22.2
Walt Disney	10.2	15.2	10.1	20.0	23.2	19.7	23.6	37.9	14.3	21.2
Warner Bros	12.9	17.2	15.9	9.0	15.6	16.6	13.9	12.4	11.7	14.4
Paramount	7.7	7.8	5.8	4.0	5.4	3.7	4.8	5.9	8.0	3.7
Lionsgate	5.7	4.7	5.5	4.0	4.0	6.3	1.5	4.2	4.5	1.8
Entertainment One	6.7	9.0	8.0	3.9	8.4	2.5	3.2	3.8	15.9	1.4
Park Circus	-	-	-	-	-	-	-	-	-	0.6
STX Entertainment	-	-	-	-	-	-	-	1.2	-	0.6
StudioCanal	-	2.8	6.7	4.7	1.5	4.2	2.8	1.0	4.5	0.5
20th Century Fox[1]	16.1	13.1	21.8	14.9	15.7	15.1	14.5	5.7	-	-
Entertainment Film Distributors	3.1	1.9	5.2	1.6	1.5	1.7	1.1	-	4.3	-
Momentum[2]	4.3	-	-	-	-	-	-	-	-	-
Shear Entertainment	-	-	-	-	-	-	-	-	1.3	-
Top 10 total[3]	**95.4**	**95.5**	**96.3**	**95.5**	**95.9**	**96.1**	**95.5**	**95.4**	**92.5**	**96.8**
Others	4.6	4.5	3.7	4.5	4.1	3.9	4.5	4.6	7.5	3.2
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Comscore
Notes:
[1] 20th Century Fox films released after October 2019 are categorised as Walt Disney distributed releases.
[2] Momentum was taken over by Entertainment One in January 2014.
[3] 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 UK independent films released in the UK and Republic of Ireland in 2021. (In total, there were 442 new film releases in the year, up from 381 in 2020.)

One third (33%) of all new releases at UK and Republic of Ireland cinemas in 2021 were foreign language films, which grossed a total of £12 million (2% of the overall box office). The high volume of foreign language releases is reflected by the number of companies in the UK handling such titles: 62 different distributors released non-English language films in the year. Five of the top 10 most popular languages for releases during the year were from the Indian subcontinent – Hindi, Punjabi, Malayalam, Tamil and Telugu – so companies releasing Indian films, such as Reliance Big Entertainment, Zee Studios and White Hill Studios, feature highly in the list.

US studio distributor Sony had the greatest share of this category's box office in 2021, generating £1.8 million from four releases, which included the top earning foreign language release of the year, the Japanese anime *Demon Slayer The Movie: Mugen Train* (£1.2 million). Zee Studios International handled the greatest number of foreign language releases (six) generating a total box office of £0.8 million. (For more on the year's top earning foreign language titles, see the Top films in 2021 chapter.)

In total, 50 distributors released UK independent films in 2021, generating a combined box office gross of £30 million (5% of the total box office) from 113 releases. The 35 films released by the top 10 distributors of these films accounted for just under £27 million, which equates to 89% of the total box office generated by independent UK titles (Table 4).

The distributor with the largest share of the box office for these films was Lionsgate, whose releases included three of the year's top 10 highest grossing UK independent titles, *The Hitman's Wife's Bodyguard, The Father* and *The Courier*. Second in the list is Universal which handled two of the category's top 10 titles, *People Just Do Nothing: Big in Japan* and *Last Night in Soho*.

Table 3 Top 10 distributors of foreign language films in the UK and Republic of Ireland, 2021 (ranked by box office gross)

Distributor	Number of foreign language films released in 2021	Average widest point of release	Box office gross (£ million)
Sony	4	205	1.8
Reliance Big Entertainment	2	117	1.2
StudioCanal	1	171	0.9
Zee Studios International	6	56	0.8
Altitude Film Distribution	4	146	0.8
White Hill Studios	2	30	0.5
Signature Entertainment	3	263	0.5
Mubi	5	33	0.5
Sun Media	5	32	0.4
Rhythm Boyz Entertainment	1	54	0.4

Source: Comscore
Box office gross = cumulative total up to 13 February 2022.

Table 4 Top 10 distributors of UK independent films in the UK and Republic of Ireland, 2021 (ranked by box office gross)

Distributor	Number of UK independent films released in 2021	Average widest point of release	Box office gross (£ million)
Lionsgate	7	265	8.7
Universal	6	238	5.2
Walt Disney	1	367	4.2
STX Entertainment	2	333	2.8
StudioCanal	6	204	2.0
Warner Bros	3	411	1.5
Sky Cinema	2	133	0.9
Picturehouse Entertainment	3	121	0.7
Reliance Big Entertainment	1	124	0.6
Munro Film Services	4	108	0.5

Source: Comscore, BFI RSU
Box office gross = cumulative total up to 13 February 2022.

WIDTH OF RELEASE

Table 5 shows the number and share of films released in the UK and Republic of Ireland from 2017 to 2021 by widest point of release (WPR). Between 2017 and 2019, around 74% of all films were released at fewer than 100 sites, while around 64% of films were released at fewer than 50 sites. In 2020 and 2021, however, the share of films released at both under 100 sites and under 50 sites was lower. The share of films released at fewer than 100 sites was 69% in 2020 and 66% in 2021 while the share of films released at fewer than 50 sites was 58% in 2020 and 57% in 2021. This shift is likely due to the smaller numbers of films released in these two years. It does, however, highlight the success of independent distributors in achieving wider theatrical releases for a greater share of independent films during these two years.

The share of films released at 500 sites or over, meanwhile, was between 7.0% and 9.5% from 2017 to 2019. In 2020, when the theatrical release of many of the year's biggest films was postponed or cancelled, this share was just 5%. In 2021, while the number of films being released at 500 sites or over was smaller than in the years 2017 to 2019, the share, at 11%, was the highest of the period.

Table 5 Number and share of releases by widest point of release, 2017-2021

	2017		2018		2019		2020		2021	
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	29	3.8	15	1.9	38	5.0	9	2.4	32	7.2
500-599	34	4.5	43	5.5	34	4.5	11	2.9	15	3.4
400-499	33	4.3	40	5.1	32	4.2	17	4.5	16	3.6
300-399	24	3.2	22	2.8	26	3.4	13	3.4	20	4.5
200-299	24	3.2	29	3.7	16	2.1	21	5.5	18	4.1
100-199	53	7.0	53	6.7	58	7.6	46	12.0	48	10.9
50-99	79	10.4	82	10.4	77	10.1	44	11.5	41	9.3
10-49	224	29.5	224	28.5	256	33.5	110	28.8	145	32.8
<10	260	34.2	279	35.5	227	29.7	111	29.1	107	24.2
Total	**760**	**100.0**	**787**	**100.0**	**764**	**100.0**	**382**	**100.0**	**442**	**100.0**

Source: Comscore, BFI RSU analysis
Notes: Percentages may not sum to totals due to rounding.
Only includes films released within each year.

WEEKEND BOX OFFICE

Table 6 shows the impact of the pandemic on the typical pattern of cinema-going. Between 2012 and 2019, 58%-59% of box office revenue was made during weekends (Friday to Sunday). In 2020, however, this share was 63% and in 2021 it was 56%. The high share in 2020 is due largely to the fact that in the latter part of that year many cinemas only opened during weekends, while the low of 2021 is due to more of the year's box office being generated during the summer and other holiday periods than usual, when going to the cinema is less concentrated at weekends.

Table 6 Box office percentage share by weekday/weekend 2012-2021

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Friday	16.4	15.8	15.3	15.3	16.1	15.7	15.5	15.3	16.1	15.9
Saturday	24.1	24.9	25.2	23.9	24.6	24.7	24.1	24.6	27.2	22.0
Sunday	17.6	18.2	18.8	18.8	18.3	18.9	19.1	19.6	20.0	18.2
Weekend	**58.1**	**58.9**	**59.2**	**58.1**	**58.9**	**59.2**	**58.7**	**59.5**	**63.2**	**56.1**
Monday	9.3	8.9	9.1	9.5	9.7	8.7	9.6	9.6	8.1	10.2
Tuesday	9.3	9.4	9.4	10.6	10.4	10.3	10.0	10.1	9.4	10.0
Wednesday	13.4	12.6	12.4	10.8	10.9	11.3	11.2	10.0	9.9	11.8
Thursday	9.8	10.2	9.8	10.9	10.1	10.6	10.6	10.9	9.3	12.0
Weekday	**41.9**	**41.1**	**40.8**	**41.9**	**41.1**	**40.8**	**41.3**	**40.6**	**36.8**	**43.9**

Source: Comscore

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

Image: *The Croods: A New Age*

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, which is particularly important for independent films which do not have the backing of the major studios. For many films, opening weekend earnings represent a significant proportion of their final theatrical gross.

As Table 7 shows, from 2012 to 2021 the average opening weekend box office as a share of total theatrical revenue was fairly consistent falling between 27%-30%. In 2021, 28% of total theatrical revenue was generated during opening weekends. (If a film is previewed before the official Friday opening, its opening weekend box office figures include the takings from its previews.) The year's top earning film, *No Time to Die*, earned £25.8 million over its four-day opening, which represented 27% of its total theatrical gross (to 13 February 2022).

Four of the year's top 20 films earned as much as 37% of their total box office on their opening weekends: *Black Widow* (five-day opening; £7.0 million), *Fast & Furious 9* (four-day; £6.1 million), *Eternals* (three-day; £5.5 million) and *Ghostbusters: Afterlife* (four-day; £4.3 million). The latter was still on release on 13 February 2022, so its opening share is likely to reduce. At the opposite end of the scale, one top 20 release earned less than 10% of its total box office on its opening weekend. *The Croods: A New Age* earned £0.7 million over its three-day opening weekend, representing just 7% of its total gross (to 13 February 2022). The second Croods title earned more in its second, third and fourth weeks in cinemas than on its opening weekend and by 13 February 2022 had been on release for a total of 31 weeks.

Table 7 Opening weekend as percentage of total box office, by box office band, 2012-2021

Range of box office (£ million)	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
≥30	27.0	24.0	27.1	32.2	27.2	26.5	26.9	30.1	16.9	30.5
20-29.9	22.4	30.9	21.9	25.9	28.0	33.3	24.7	24.7	-	25.5
10-19.9	24.6	27.6	30.9	25.6	29.1	28.5	25.3	24.8	25.2	26.7
5-9.9	26.1	28.4	25.9	28.7	32.2	33.2	29.5	28.7	30.7	24.7
1-4.9	31.8	32.1	30.3	32.3	33.1	32.1	34.5	31.0	30.3	27.7
0.2-0.9	37.7	37.0	36.7	37.3	37.7	35.1	35.6	39.1	42.1	33.6
<0.2	37.8	38.3	40.0	39.6	39.6	41.4	41.6	43.9	43.0	43.3
All films	**26.8**	**28.4**	**27.9**	**29.9**	**29.8**	**29.9**	**27.9**	**28.9**	**27.4**	**28.1**

Source: Comscore
Notes:
Opening weekends include preview figures.
Only includes films released within each year.

FILM ADVERTISING

Distributors invest heavily in advertising across all media (outdoor posters, print media, television, radio and online) in order to raise a film's profile with potential audiences. The estimated total advertising spend by distributors in 2021 was £61 million, up from £48 million in 2020, but still well below the £201 million invested in 2019 (Table 8). Even taking into account the lower numbers of film releases in both 2020 (382) and 2021 (442) compared with 2019 (764), the average advertising spend per film was substantially lower in both these years: £0.13 million in 2020 and £0.14 million in 2021 compared with £0.26 million in 2019.

It should be noted that the data for digital advertising only covers 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 19% of the total advertising spend for film in 2021. However, as the data for this category are not wholly comprehensive, we believe this share to be an underestimate.

Table 9 shows the share of advertising spend on traditional media only (television, outdoor, print and radio) from 2012 to 2021. It does not include digital advertising activity due to the reporting limitations described above. Over the period, the majority of expenditure has been allocated to TV and outdoor advertisements. These two categories accounted for 84%-88% of traditional media advertising spend each year, with TV taking the largest share of the two, with the exception of 2019 and 2020. In 2021, TV advertising accounted for 49% of the total spend on traditional media, with outdoor advertising accounting for 38%.

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 2012 to 3% in 2021. Conversely, the share of advertising spend allocated to radio has seen an overall increase, rising from 4% in 2012 to 10% in 2021. The percentage of advertising spend on radio has been greater than for press each year since 2019.

Table 8 Estimated advertising spend 2012-2021 (£ million)

Medium	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
TV	89.1	89.2	101.0	102.2	93.3	81.1	79.2	67.2	14.5	24.2
Outdoor	67.2	71.2	64.2	60.5	52.8	56.5	54.9	73.1	19.1	18.9
Press	21.5	20.7	24.2	21.3	14.9	14.0	10.8	9.2	2.3	1.5
Radio	6.8	5.9	4.6	7.4	5.7	12.1	8.7	11.1	2.7	4.9
Sub-total	**184.6**	**187.0**	**194.0**	**191.4**	**166.7**	**163.7**	**153.6**	**160.6**	**38.5**	**49.6**
Digital*	4.0	2.5	1.1	0.7	46.4	65.5	43.7	40.5	9.9	11.7
Total	**188.6**	**189.4**	**195.1**	**192.1**	**213.1**	**229.5**	**197.5**	**201.1**	**48.4**	**61.2**

Source: Nielsen Media Research
Notes:
Figures may not sum to totals/sub-totals due to rounding.
* The figures for 2014 onwards are not historically comparable; different methodologies were used for internet advertising spend for the periods 2012-2013, 2014-2015 and 2016-2021.

Table 9 Share of traditional media advertising spend, 2012-2021

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
TV	48.3	47.7	52.1	53.4	56.0	49.5	51.6	41.8	37.6	48.9
Outdoor	36.4	38.1	33.1	31.6	31.7	34.5	35.7	45.5	49.5	38.2
Press	11.6	11.1	12.5	11.1	8.9	8.6	7.0	5.7	5.9	3.1
Radio	3.7	3.2	2.4	3.9	3.4	7.4	5.7	6.9	6.9	9.8
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Nielsen Media Research
See notes to Table 8.

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