



THE BOX OFFICE 2020

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FACTS IN FOCUS

The year was defined by the onset of the COVID-19 pandemic, which resulted in the closure of UK cinemas in late March, as such 2020 was an unprecedented year for the UK box office.

- ▶ 2020 saw substantial disruption from the COVID-19 pandemic with revenues and admissions sharply down as cinemas closed their doors during multiple national lockdowns.
- ▶ UK cinema admissions were 44 million, the lowest on record.
- ▶ UK box office receipts in 2020 were £307 million, down 76% on 2019.
- ▶ A total of 381 films were released in the UK and Republic of Ireland, less than half the number released in 2019.
- ▶ UK films, including co-productions, accounted for 25% of releases and 47% of the market by value.
- ▶ The box office share of UK independent films was 14.2%, up from 12.9% in 2019, though total revenues were substantially down.
- ▶ The top 100 films earned 98% of the gross box office, the highest share of the last decade.

The box office 2020

Admissions

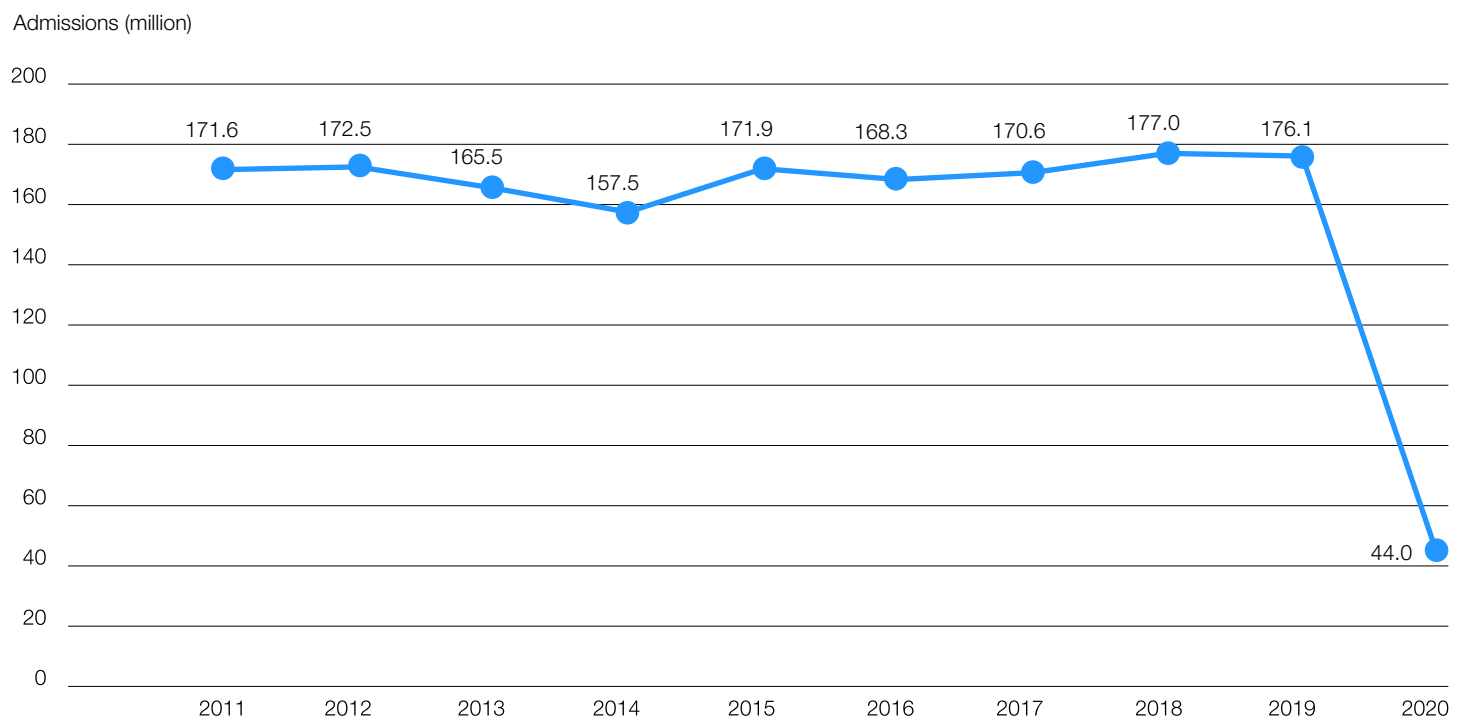
The outbreak of the COVID-19 pandemic resulted in a massive drop in the number of tickets sold in the UK with just 44 million cinema tickets sold in the UK in 2020 (Figure 1). This is a 75% decline on 2019 and the lowest figure since continuous records began in 1935, being 10 million fewer admissions than the previous low of 54 million in 1984.

Across the world, there were substantial drops in cinema admissions with the average decline in the 15 largest markets in 2019 being a 71% drop. Japan was the only market in the 2019 top 15 to have a decline of less than 50%.

Of the major European territories, Russia reported the smallest drop at 59.6% followed by Germany (-67.9%), France (-69.4%), and Spain (-73.1%). The UK had the largest drop of the largest European markets at -75%.

Of the three markets that recorded over a billion admissions in 2019, China saw the smallest decrease (-68.3%). There were similar levels of decrease in both USA and Canada (-80.2%) and India (-81.0%). The biggest decrease in the 15 largest territories was recorded in Mexico where there was a decrease of 82.3%.

Figure 1 Annual UK cinema admissions, 2011-2020



Source: Cinema Advertising Agency (CAA), Comscore

Total admissions

Table 1 15 largest markets by admissions 2018, 2019 and 2020 (ranked by 2019 admissions)

Territory	Admissions 2018 (million)	Admissions 2019 (million)	Admissions 2020 (million)	+/- 2019 (%)
China	1,716,985	1,727,000	548,000	-68
India	1,560,000	1,460,000	277,655	-81
USA	1,215,022	1,163,000	226,336	-81
Mexico	332,000	350,100	62,000	-82
South Korea	216,390	226,680	61,500	-73
Russia	200,200	219,400	88,700	-60
France	197,100	209,200	64,100	-69
Japan	169,210	194,910	106,137	-46
Brazil	163,464	176,433	38,837	-78
UK	177,001	176,054	43,981	-75
Indonesia	135,131	140,000	47,214	-66
Germany	105,400	118,611	38,094	-68
Spain	97,700	104,900	28,200	-73
Italy	85,903	97,587	28,140	-71
Philippines	88,000	92,000	28,900	-69

Source: CAA, BFI, European Audiovisual Observatory, OMDIA

Note: Due to the unprecedented nature of 2020 admissions the analysis focuses on the 15 largest markets of 2019 to illustrate the impact COVID-19 had on comparable large markets

Table 2 shows the breakdown of UK admissions for 2020 by month. The first two months of the year were unaffected by the COVID-19 pandemic and continued the strong trend for admissions seen in 2019. January saw the highest admissions for the year with 16.5 million, as audiences were attracted by Oscar® nominated films such as *1917* and *Parasite*, as well as releases from late 2019 including *Star Wars: The Rise of Skywalker*. The January admissions were the third highest for any January since the turn of the millennium. February saw a 19% increase in admissions year-on-year. However, by the second week of March the effects of the COVID-19 pandemic started to become apparent, and the government introduced a full lockdown on 23rd March, requiring all cinemas to close.

The rest of the year was heavily affected by the COVID-19 pandemic, with 20 weeks directly affected by national lockdowns. Cinemas remained closed until July when a gradual reopening began, albeit with social distancing regulations in place limiting audience sizes. August, September and October saw admissions of between 2 and 3 million, all of which are 75-86% decreases compared to the previous year. While major studio films were released during these months (including Christopher Nolan's *Tenet*), drawing modest numbers of cinemagoers, many planned releases were delayed into 2021 or moved onto Video On Demand platforms. New lockdowns were introduced in November, and meant most UK cinemas were closed through the majority of the month. While many cinemas did reopen briefly before the end of the year, low levels of admissions continued into December, and the year ended with all cinemas closed due to further national lockdowns.

Over 31 million cinema admissions occurred in the first two months of the year, 20% up on 2019 (26 million). However they, along with the first weeks of March, ended up accounting for 82% of the total annual admissions for the year (these months accounted for 21% in 2019). The final nine months of 2020 accounted for 8.1 million admissions.

Table 2 Monthly UK cinema admissions, 2016- 2020

Admissions (million)	2016	2017	2018	2019	2020	% change on 2019
January	14.0	15.0	16.2	13.7	16.5	20.4
February	15.4	16.5	16.1	12.2	14.5	19.0
March	13.4	16.2	13.5	11.4	4.8	-57.9
April	13.1	15.6	15.5	16.0	-	-100.0
May	12.5	11.3	13.7	16.6	-	-100.0
June	10.7	9.6	10.4	13.9	-	-100.0
July	16.6	17.8	15.6	18.7	0.4	-97.9
August	18.1	14.5	19.2	15.6	2.1	-86.7
September	11.7	10.8	10.1	11.0	2.7	-75.8
October	15.2	12.1	16.1	16.3	2.2	-86.6
November	12.4	14.1	14.9	12.2	0.3	-97.5
December	15.2	17.2	15.7	18.5	0.5	-97.2
Total	168.3	170.6	177.0	176.1	44.0	-75.0

Source: CAA, Comscore



Image: *Emma* © 2019 Focus Features, LLC. All rights reserved. Courtesy of Universal Studios Licensing LLC

Timeline of national responses to the coronavirus pandemic, 2020

This table shows the timeline of the main points in the UK response to the COVID-19 pandemic in 2020. This list is non-exhaustive, and does not reflect many of the regional restrictions which were put in place.

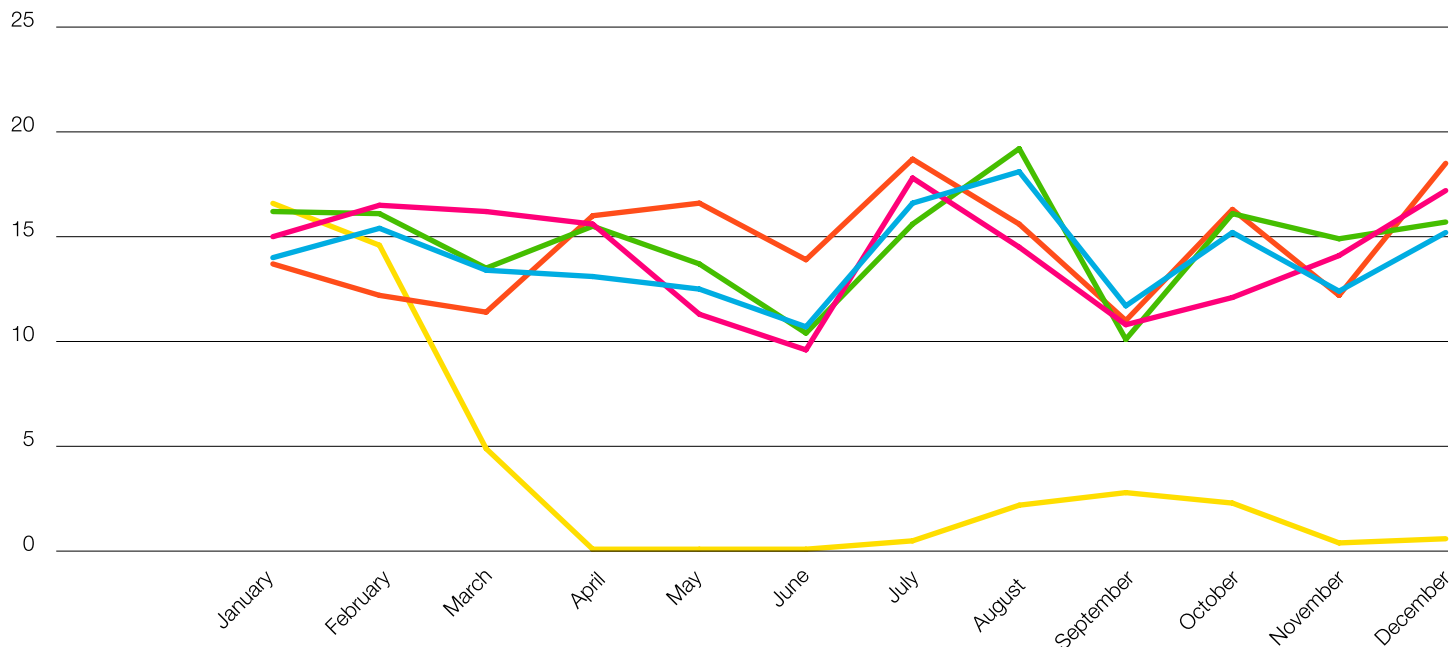
Date	Nationwide responses to the pandemic
16/03/2020	UK Prime Minister addresses the country saying “now is the time for everyone to stop non-essential contact and travel” Most cinemas in the UK and the Republic of Ireland shut, the remaining close over the next few days
23/03/2020	UK PM announces the first lockdown in the UK, requiring people to “stay at home”
10/05/2020	UK PM announces a conditional plan for lifting lockdown
29/06/2020	Cinemas in the Republic of Ireland begin re-opening
03/07/2020	Cinemas in England begin re-opening, with some regional restrictions still in place
11/07/2020	Cinemas in Northern Ireland begin re-opening
15/07/2020	Cinemas in Scotland begin re-opening
03/08/2020	Cinemas in Wales begin re-opening
26/08/2020	<i>Tenet</i> released - a majority of chain cinemas are now open
07/10/2020	Cinemas in the Republic of Ireland close
09/10/2020	Cineworld shuts all cinemas until further notice
17/10/2020	Cinemas in Northern Ireland close
23/10/2020	Cinemas in Wales close
02/11/2020	Many cinemas in Scotland close due to regional restrictions
05/11/2020	Cinemas in England close
09/11/2020	Cinemas in Wales begin re-opening
01/12/2020	Cinemas in the Republic of Ireland begin re-opening
02/12/2020	Cinemas in England begin re-opening, with some regional restrictions still in place
04/12/2020	Cinemas in Wales close
11/12/2020	Cinemas in Northern Ireland begin re-opening
16/12/2020	<i>Wonder Woman 1984</i> released
25/12/2020	Cinemas in Northern Ireland, the Republic of Ireland, Scotland and Wales close
31/12/2020	Cinemas in England close

Source: BFI

Looking at monthly admissions since 2016, Figure 2 shows the dramatic drop off in March, along with the complete lack of admissions during the national lockdown. Audiences started to venture back between August and October, however admissions remained low, driven by concerns over the indoor transmission of COVID-19, and a lack of major theatrical releases. New national lockdowns in November and December resulted in very low admissions at the end of the year.

Figure 2 Monthly UK cinema admissions, 2016-2020

Admissions (millions)



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
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
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
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
2020	16.5	14.5	4.8	-	-	-	0.4	2.1	2.7	2.2	0.3	0.5

Source: Comscore, BBFC, BFI RSU analysis

Note: Figures as at 18 February 2021.

Table 3 shows how the 2020 admissions break down by the television advertising regions used by the Incorporated Society of British Advertisers (ISBA). Overall, the pattern of national and regional admissions has remained largely unchanged over the last decade and the COVID affected year of 2020 is no different. While different nations and regions may have had additional lockdown periods or stricter rules around social distancing, the effect of this is minimal as 82% of the total admissions in 2020 were generated in the early months of the year.

Whilst admissions were significantly down everywhere, the UK's most populous region, London, accounted for the highest share of admissions (23.3%) followed by the South and South East and the Midlands (with 12.1% and 11.4% respectively). In terms of average admissions per head of population, cinema-going was highest in London, Northern Ireland, Central Scotland and the East of England and lowest in Wales and Border regions.

Table 3 Cinema admissions by ISBA TV region, 2020

Region	Admissions (million)	%	Population (million)	Admissions per person
London	10.2	23.3	13.7	0.75
South and South East	5.3	12.1	7.7	0.70
Midlands	5.0	11.4	9.1	0.55
North West	4.6	10.4	7.2	0.64
Yorkshire	3.8	8.7	6.5	0.58
East of England	3.6	8.1	5.0	0.71
Central Scotland	2.8	6.3	3.9	0.72
Wales	1.7	3.9	3.1	0.54
North East	1.7	3.9	2.8	0.61
West	1.6	3.7	2.5	0.66
Northern Ireland	1.4	3.1	1.9	0.73
South West	1.1	2.6	1.8	0.64
Northern Scotland	0.8	1.8	1.3	0.62
Border	0.3	0.7	0.6	0.49
Total	44.0	100.0	67.1	0.66

Source: CAA, Comscore

Notes:

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

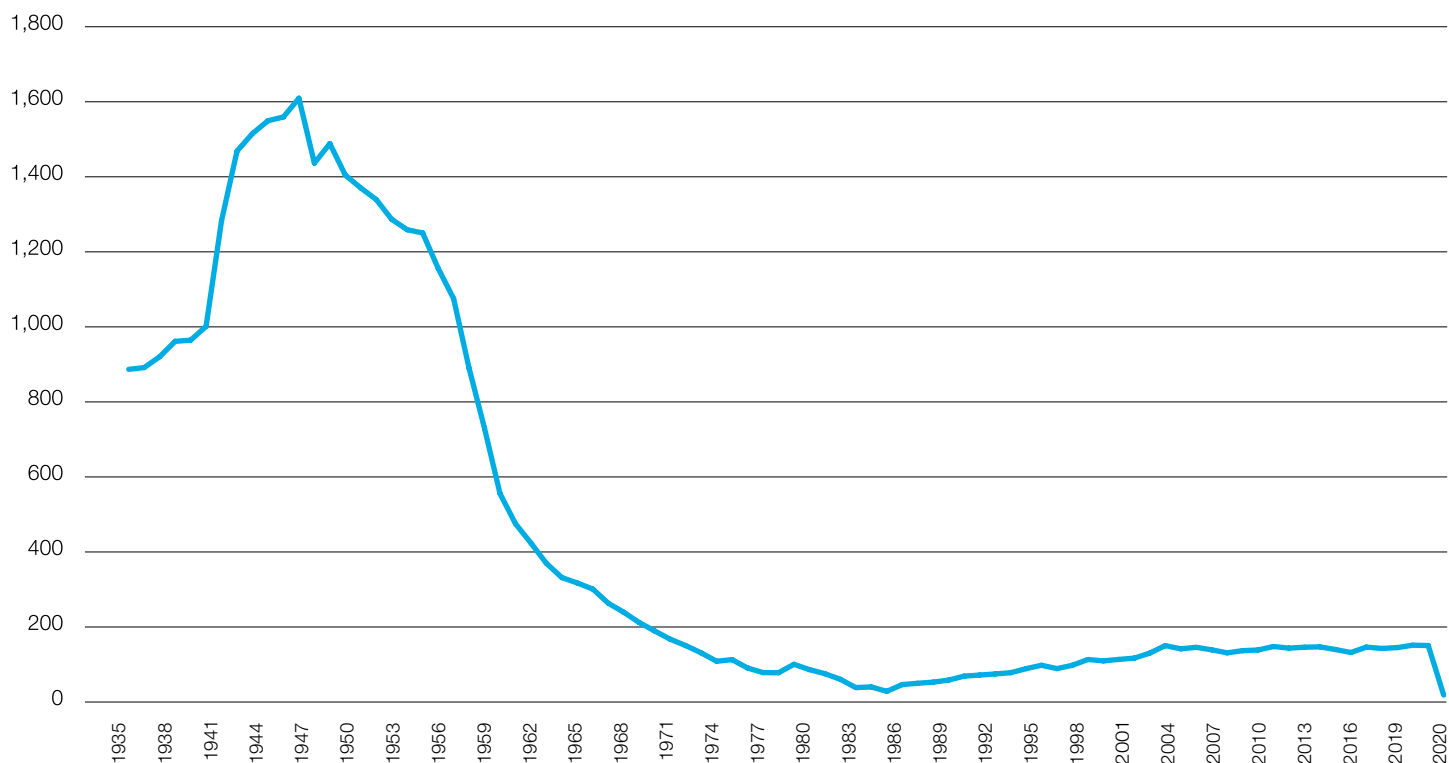
The difference in the share of admissions between Midlands and South and South East is explained when admissions figures are shown to two decimal places: Midlands (21.05 million), and South and South East (20.97 million).

Figure 3 puts UK admissions in a longer term perspective and shows the dramatic impact of COVID-19 marking 2020 as the year with the lowest total admission since continuous records began in 1935.

Along with the USA and other western European countries, cinema-going in the UK declined sharply in the post-war era as 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 total number 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 previous 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. The COVID-19 pandemic brought a drastic break in this resurgence, with 44 million admissions being the lowest on record.

Figure 3 Annual UK admissions, 1935-2020

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

Source: BFI, CAA, Comscore

UK box office earnings

According to Comscore, the total UK box office gross for all titles on release in 2020 was £307 million, a quarter of the revenues achieved in 2019 (Table 4).

Table 4 UK box office trends, 2011-2020

Year	Box office gross (£ million)	Change on previous year %	Change since 2011 %
2011	1,040	-	-
2012	1,099	5.7	5.7
2013	1,083	-1.5	4.1
2014	1,063	-1.8	2.2
2015	1,242	16.8	19.4
2016	1,228	-1.1	18.1
2017	1,279	4.2	23.0
2018	1,282	0.2	23.3
2019	1,254	-2.2	20.6
2020	307	-75.5	-70.5

Source: Comscore

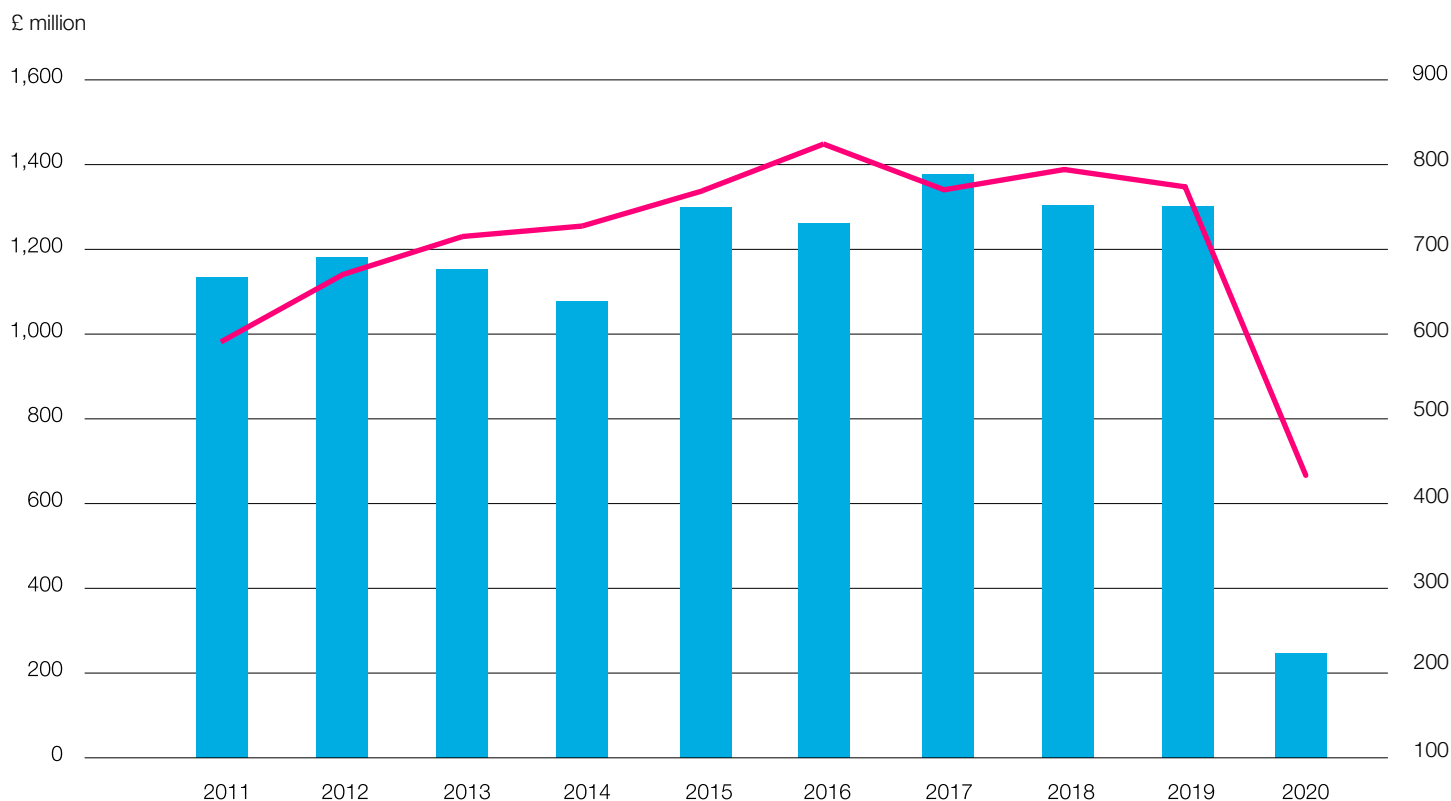
Film releases and box office revenues in the UK and Republic of Ireland

In 2020, 381 films were released in the UK and Republic of Ireland, just under half the number of films released in 2019 (764). This equates to an average of just over seven releases per week (or 11 per week excluding weeks when cinemas were closed) compared with an average of just under 15 releases per week in 2019. These films generated £247 million in box office revenues at the UK and Republic of Ireland box office. (This figure differs from the £307 million quoted in Table 4, as that figure includes all titles on release, and is for the UK only.) The subsequent analysis in this chapter includes all films released in 2020, and to remain consistent with previous editions of the yearbook it includes revenues generated up to 18 February 2021, even though cinemas were mostly closed in the first two months of 2021.

Figure 4 shows the sharp drop in the number of films and box office revenue in 2020. The previous nine years showed an upward trend in both the number of films exhibited and theatrical earnings over the period.

The average revenue per release in 2020 was £600,000, which is substantially lower than in the previous nine years, where the average release generated about £1.7 million)

Figure 4 Revenues and releases at the UK and Republic of Ireland box office, 2011-2020



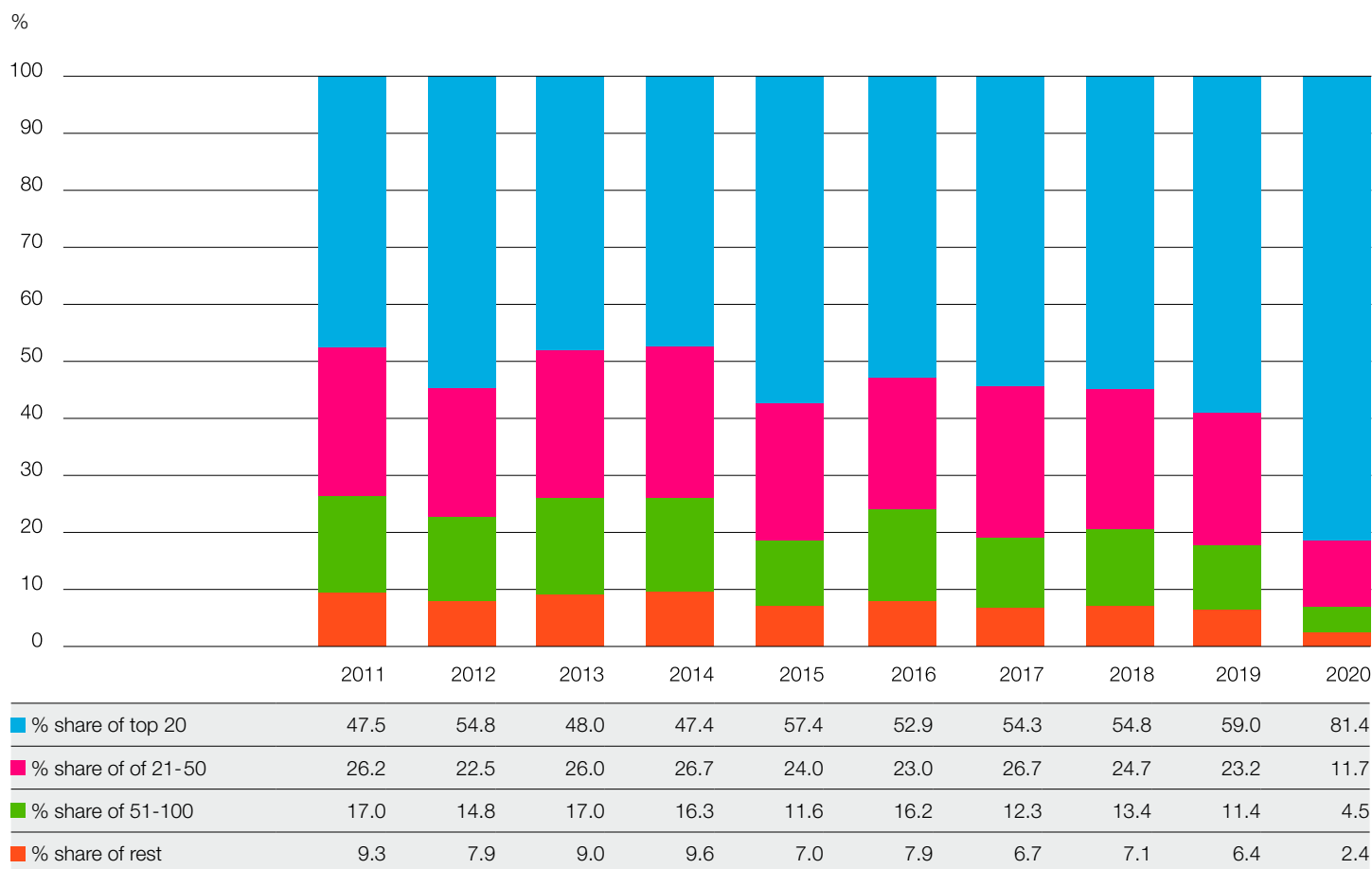
Box office gross (£ million)	1,134.5	1,182.4	1,153.7	1,077.8	1,298.4	1,262.0	1,376.9	1,304.8	1,300.9	246.9
Number of releases	558	647	698	712	759	821	760	787	764	381
Average revenue per release (£ million)	2.0	1.8	1.7	1.5	1.7	1.5	1.8	1.7	1.7	0.6

Source: Comscore, BFI RSU analysis

Note: Box office up to and including 18 February 2021, only includes new in-year releases.

The top 20 earning films of 2020 accounted for 81% of the total market, a substantial increase from 59% in 2019 (Figure 5). Of the top 20 earning films, 17 were released in the first quarter, with the top six films accounting for more than half the total box office for the year (although this includes *Tenet*, released in August). This occurred because not only were there fewer than usual releases in the latter part of the year, they also mostly underperformed at the box office, leaving the films released in Q1 to have an outsized share of the final box office. Consequently, the box office skews more heavily towards the top 20 than in previous years.

Figure 5 Market share of top 20, 21-50, 51-100 and rest of films, 2011-2020

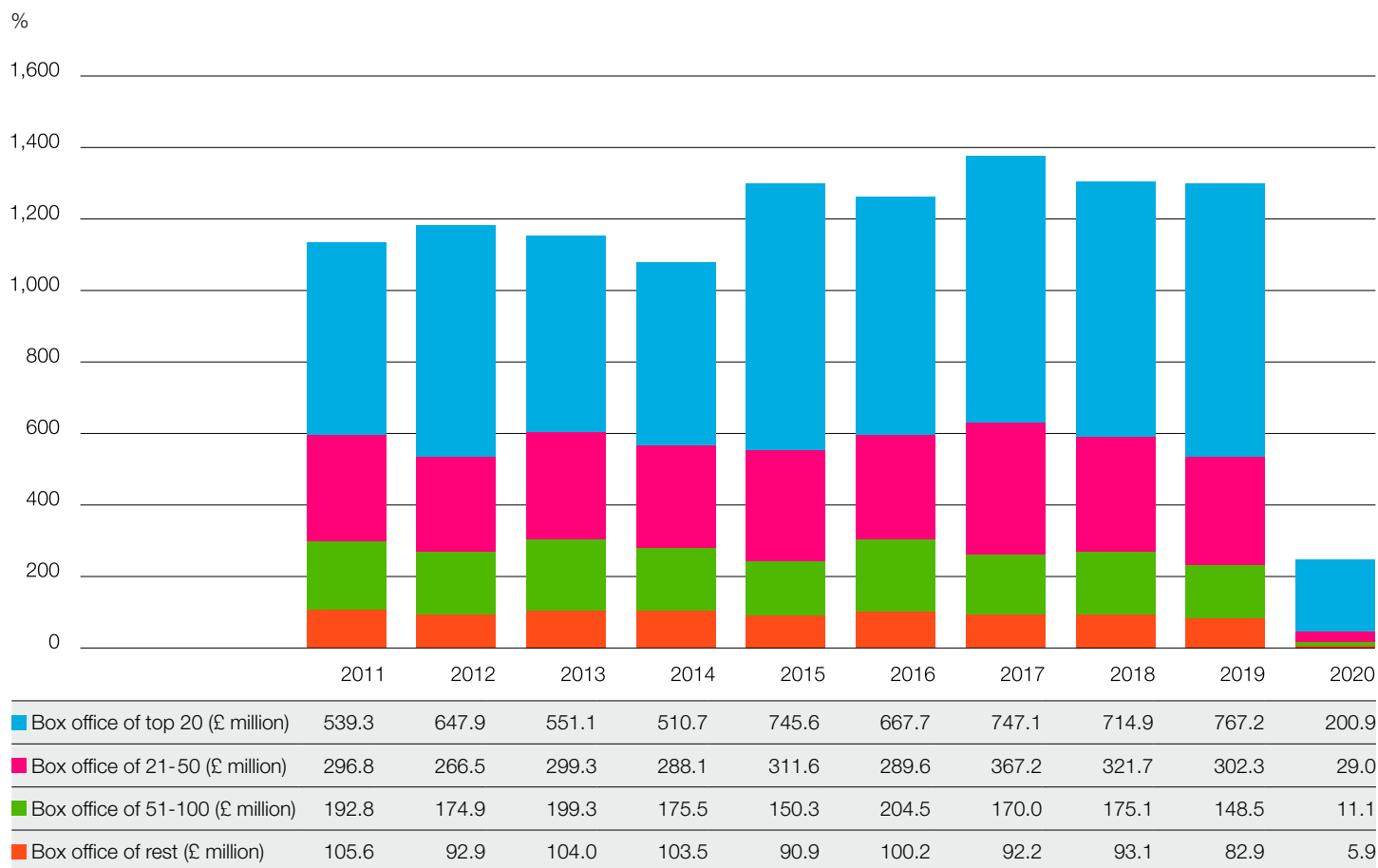


Source: Comscore, BFI RSU analysis

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

As Figure 6 shows the total box office gross generated in 2020 saw a dramatic drop off compared to the previous years, being roughly the equivalent of the box office generated by the films outside the Top 50 in the previous years of the last decade. More than 92% of the box office was generated by the top 50 films. The Top 6 films, of which 5 were released pre-pandemic, accounted for more than 50% of the total box office for the year.

Figure 6 Gross box office of top 20, 21-50, 51-100 and rest of films, 2011-2020



Source: Comscore, BFI RSU analysis

Table 5 shows the large drop in box office revenue and number of films released in 2020 outside the Top 100. In 2020 £5.9 million was generated by the 281 films outside the top 100 with a median box office of £8,767, all figures being a drastic drop from 2019 (£83 million total, from 664 titles with a £26,767 median).

Table 5 Releases and revenues of films outside the top 100, 2011-2020

	Number of films	Gross box office (£ million)	Median box office (£)
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
2020	281	5.9	8,948

Source: Comscore, BFI RSU analysis

Widest point of release

Table 6 outlines the number of films released in the UK and Republic of Ireland in 2020 by the number of sites at the widest point of release (WPR). Just nine films (2.4% of all releases) were simultaneously screened at over 600 sites in 2020, a drop from 38 films – or 5.0% of all releases – in 2019. A total of 117 releases were shown at 100 sites or over (30% of all films released), while 110 films were shown at fewer than 10 sites (28%).

Table 6 Number of releases and median box office gross by number of sites at widest point of release, 2020

Number of sites at WPR	Number of releases	% of releases	Median box office (£)	Minimum box office (£)	Maximum box office (£)
≥600	9	2.4	8,825,588	2,516,068	44,093,644
500-599	11	2.9	2,795,843	455,472	16,214,071
400-499	17	4.5	809,063	304,021	4,002,501
300-399	13	3.4	764,175	73,464	1,636,943
200-299	21	5.5	157,048	30,392	1,533,299
100-199	46	12.1	90,445	14,426	1,427,214
50-99	44	11.5	51,461	4,335	567,969
10-49	110	28.9	11,693	937	181,241
<10	110	28.9	2,926	32	49,157
Total	381	100.0	19,945	32	44,093,644

Source: Comscore, BFI RSU analysis

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

Country of origin of film releases

Twenty-eight per cent of all films released in the UK and Republic of Ireland in 2020 were of USA origin (excluding UK-qualifying partnerships) and these films accounted for 42% of total box office earnings (Table 7).

UK films, including co-productions, represented 25% of releases (the same as in 2018 and 2019) and 46.5% of the box office. UK qualifying independent films represented the majority of this share of releases (23% overall) and accounted for 14% of the box office (similar percentages to 2018 and 2019)

Films originating outside the UK and USA accounted for 47% of releases in 2020 (down from 50% in 2019) and accounted for 11% of earnings. This is a big increase on the 4% seen in the previous two years, and it is mostly attributable to the box office successes of the Oscar® winning *Parasite* from South Korea and the Canadian *PAW Patrol: Ready Race Rescue*. Films from non-UK European countries accounted for 2.7% of the box office (up from 1.1% in 2019) from 23% of releases. Films from India accounted for 0.9% of the total box office in 2020, down from 2019 (1.2%).

Table 7 Country of origin of films released in the UK and Republic of Ireland, 2020

Country of origin	Number of releases	% of all releases	Box office gross (£ million)	% of total box office
USA	107	28.1	104.1	42.1
UK (studio-backed*)	7	1.8	79.7	32.3
UK (independent)	89	23.4	35.1	14.2
All UK	96	25.2	114.8	46.5
Other Europe	88	23.1	6.6	2.7
India	43	11.3	2.3	0.9
Rest of the world	47	12.3	19.2	7.8
Total	381	100.0	247	100

Source: Comscore, BFI RSU analysis

Notes:

Box office gross = cumulative total up to 18 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.

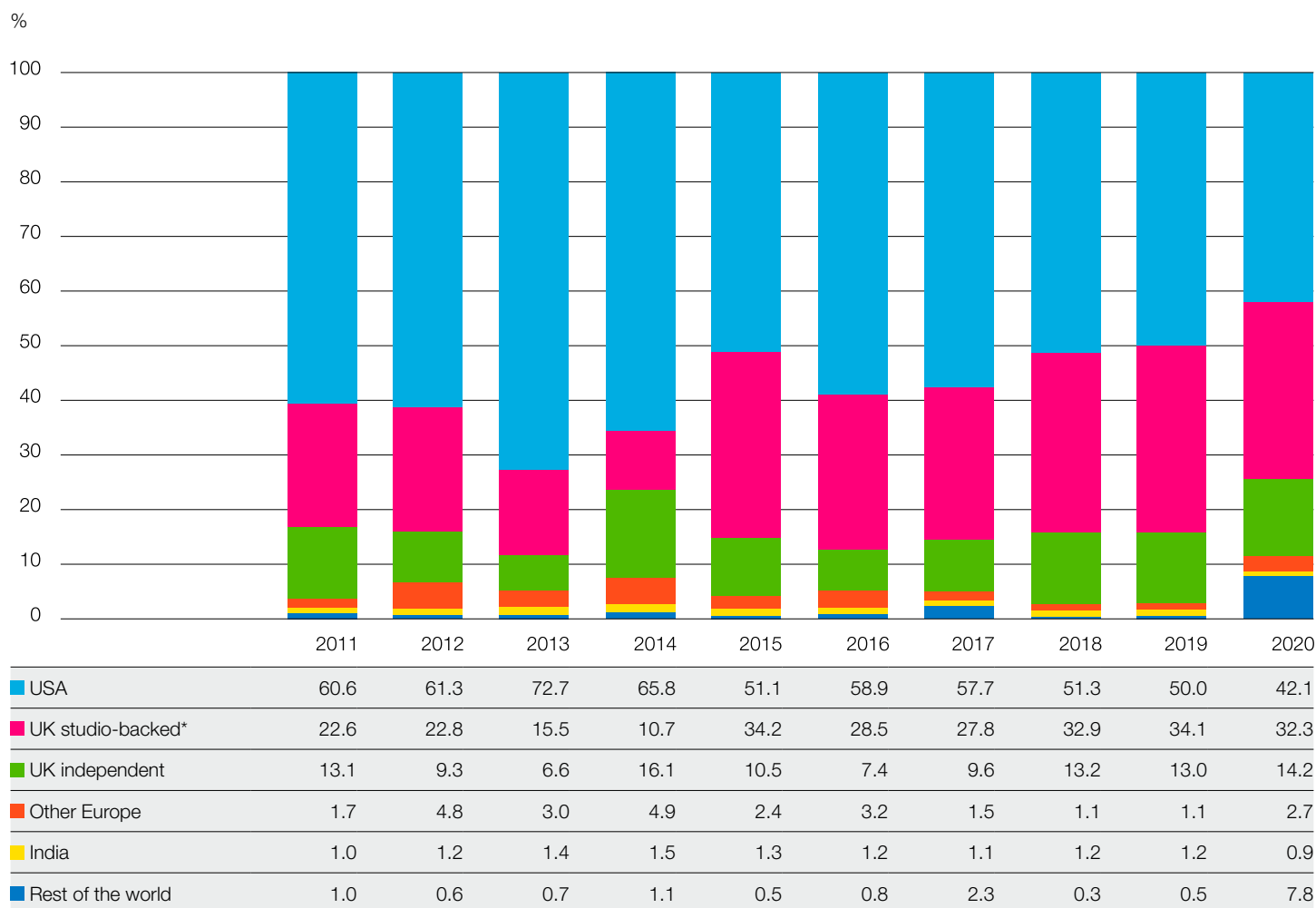
Figure 7 shows the breakdown of market share by country of origin for all films released between 2011 and 2020. The most significant trend over the period has been a decline in share for USA-only films, which has been compensated by an increase in share for UK/USA studio-backed titles. The combined share of USA-only and UK/USA studio-backed films was 88% in 2013, but fell to an average of around 84% for the remainder of the period, before dropping to 74% in 2020.

UK-qualifying independent films had a market share of 14% in 2020. This was the highest share since 2014 (16%), and was driven by titles including *The Gentlemen*, *Emma* and *The Personal History of David Copperfield*.

2020 saw a larger share of the market generated by films from the 'Rest of the World', thanks to the performance of *Parasite*, which made £12 million and accounted for 63% of the 'Rest of the World' total.

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, 2011-2020



Source: BFI, RSU

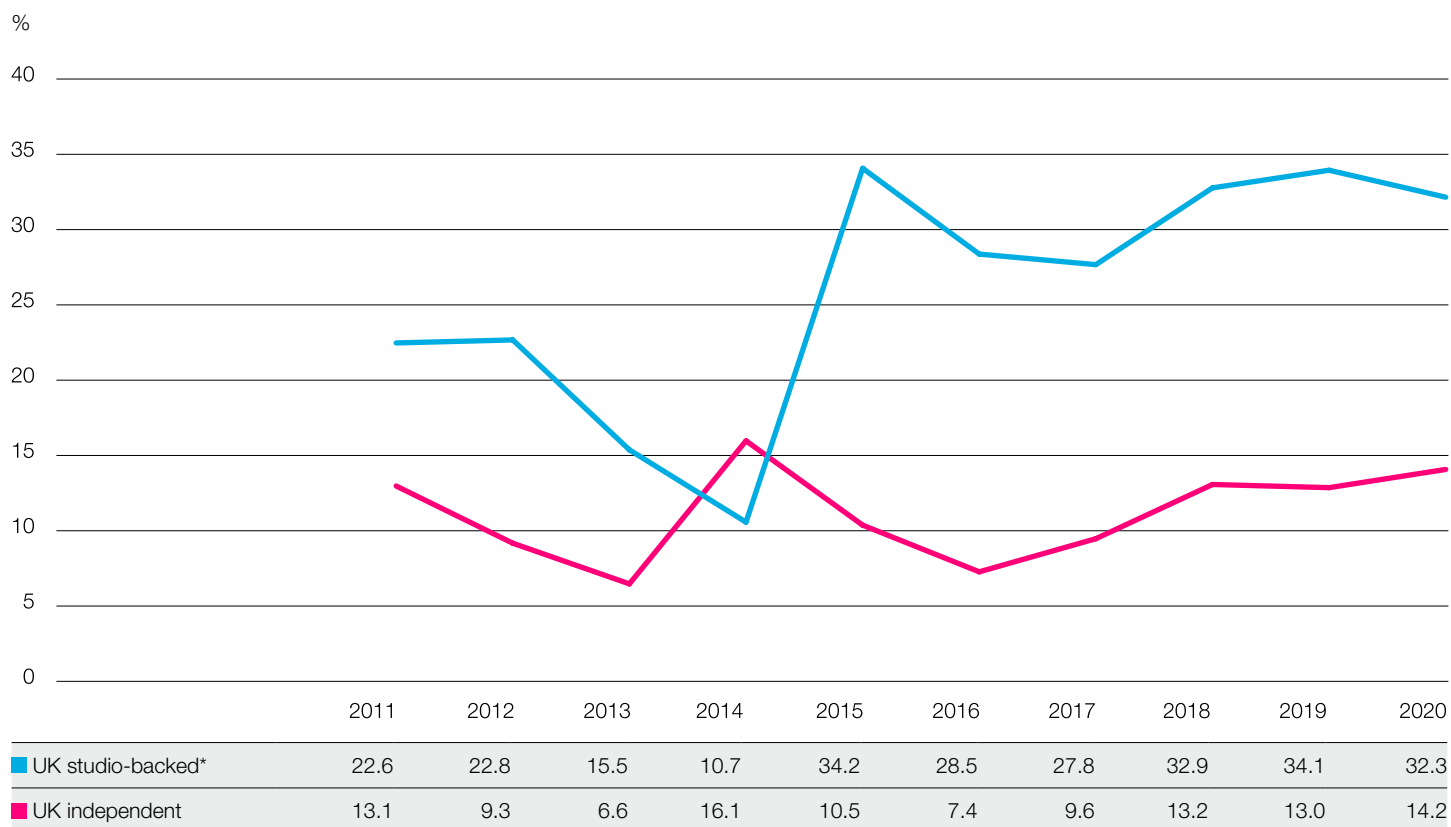
Notes:

Data has been revised since the publication of the 2019 data

* '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 UK qualifying independent market share for the 10-year period was just over 10% with a slight upward trend from a low of just over 6.6% in 2013.

Figure 8 UK films' share of the UK theatrical market, 2011-2020



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 2020, 91% of UK films earned less than £1 million at UK and Republic of Ireland cinemas (the largest share of the period), while only one film (1917) earned £20 million or more. Only eight UK titles made more than £1 million at the box office, with *Tenet* and *Wonder Woman 1984* being the only two titles to pass the £1 million mark after the first UK lockdown.

Table 8 UK releases by box office band, 2011-2020 (£ million)

		≥20	10 – 19.99	5 – 9.99	1 – 4.99	0.1 – 0.99	<0.1	Total
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
2020	Number	1	3	2	2	18	70	96
	%	1.0	3.1	2.1	2.1	18.8	72.9	100

Source: Comscore, BFI RSU analysis

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



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