EXHIBITION

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FACTS IN FOCUS

The exhibition sector faced major challenges during 2020 as a result of the COVID-19 pandemic, with cinemas either closed or operating at reduced capacity for much of the year.

- In 2020, the UK had 4,682 screens in 985 cinemas.
- Multiplexes accounted for 40% of cinema sites and 79% of screens.
- There were seven screens for every 100,000 people in the UK, lower than countries such as the USA (12.4), France (9.3), Australia (8.8) and Spain (7.7).
- In 2020, the three largest exhibitors owned 31% of all UK cinemas and 60% of UK screens.
- The average ticket price at commercial cinemas in 2020 was £6.98, down from £7.12 in 2019.
- Event cinema generated £11 million from 60 releases at the UK and Republic of Ireland box office in 2020, down from a record high of £52 million in 2019.

Exhibition

Background to the UK exhibition sector in 2020

In an effort to reduce the transmission risk of COVID-19, the UK Government required all cinemas to close at the end of Q1 2020. Restrictions were eased at the beginning of Q3, which enabled cinemas to reopen if they had additional safety measures in place (including operating at reduced capacity); however, further national and regional restrictions were implemented during periods in late Q3 and Q4 which required many cinemas to close again.

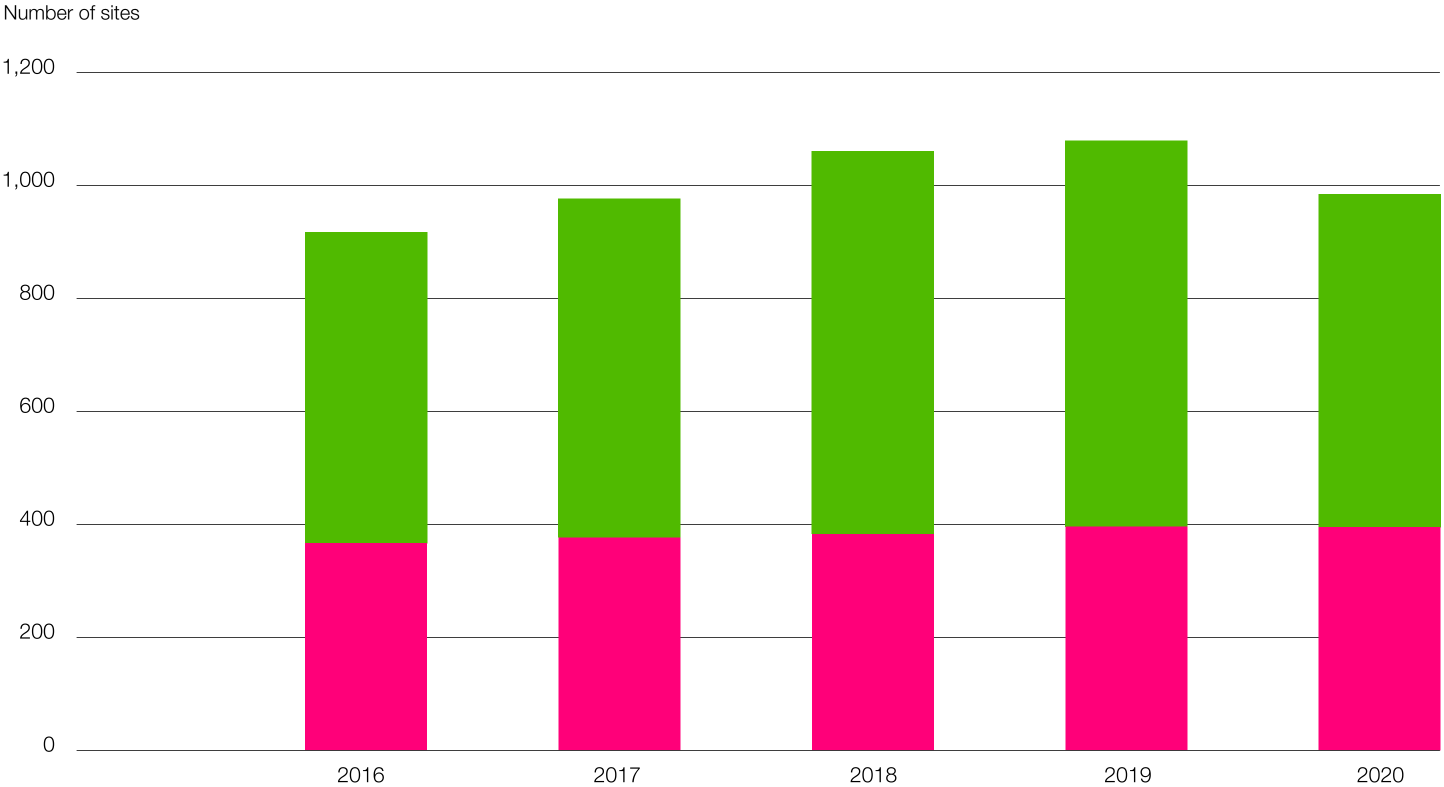
To help support non-profit and independent cinemas at risk of permanent closure, the Culture Recovery Fund for Independent Cinemas in England was launched in August as part of the UK Government's £1.57 billion support package for cultural and heritage organisations hit hard by the pandemic. Administered by the BFI on behalf of the Department for Digital, Culture, Media & Sport (DCMS), in 2020 the fund awarded a first raft of over £16 million to more than 200 cinemas in the form of 'Safety Grants' to enable cinemas to put coronavirus health and safety measures in place, and 'Business Sustainability Grants' to support cinemas to reach a break-even point during their first months of re-opening. The devolved administrations were allocated a total of £189 million from central Government towards cultural and heritage support. Funding for cinemas was made available through the Scottish Government's Independent Cinema Recovery and Resilience Fund, the Welsh Assembly Government's own Cultural Recovery Fund, and the Northern Ireland Executive's Stability & Renewal Programme for Organisations.

UK cinema sites

Figure 1 shows the number of cinema sites in the UK from 2016 to 2020. It should be noted that these data are not comparable with those published in previous Yearbooks due to a change in data suppliers and the methodology used to calculate the number of sites. Cinemas are now only included in the count if they have reported any theatrical grosses to Comscore for the given year. (It should be noted that figures for 2016-2019 have been updated on the basis of the new methodology so that the data are consistent for reviewing trends.)

According to Comscore there were year-on-year increases in the number of UK cinema sites between 2016 and 2019, with an overall rise from 918 to 1,080. There was a decrease, however, in the number of sites reporting in 2020. While there was little change in the number of multiplexes between 2019 and 2020 (a decrease from 396 to 395), there was a substantial fall (-14%) in the number of traditional and mixed-use sites, which decreased from 684 to 590. This fall is partly explained by the fact that some mixed-use sites, which screen films only part of the time, were not counted in 2020 as they reported no earnings from film screenings for the year. The share of multiplexes in the UK in 2020 was 40%, up from 37% in 2019.

Figure 1 UK cinema sites by type of site, 2016-2020



	2016	2017	2018	2019	2020
Traditional and mixed-use	551	600	678	684	590
Multiplex	367	377	383	396	395
Total sites	918	977	1,061	1,080	985
% multiplex sites	40.0	38.6	36.1	36.7	40.1

Source: Comscore, BFI

Notes:

These data are not comparable with those of previous Yearbooks which were based on different methodology. Figures are now based on the number of sites reporting any film or event cinema box office grosses to Comscore within a given year. Figures for 2016-2019 have been updated using the new methodology.

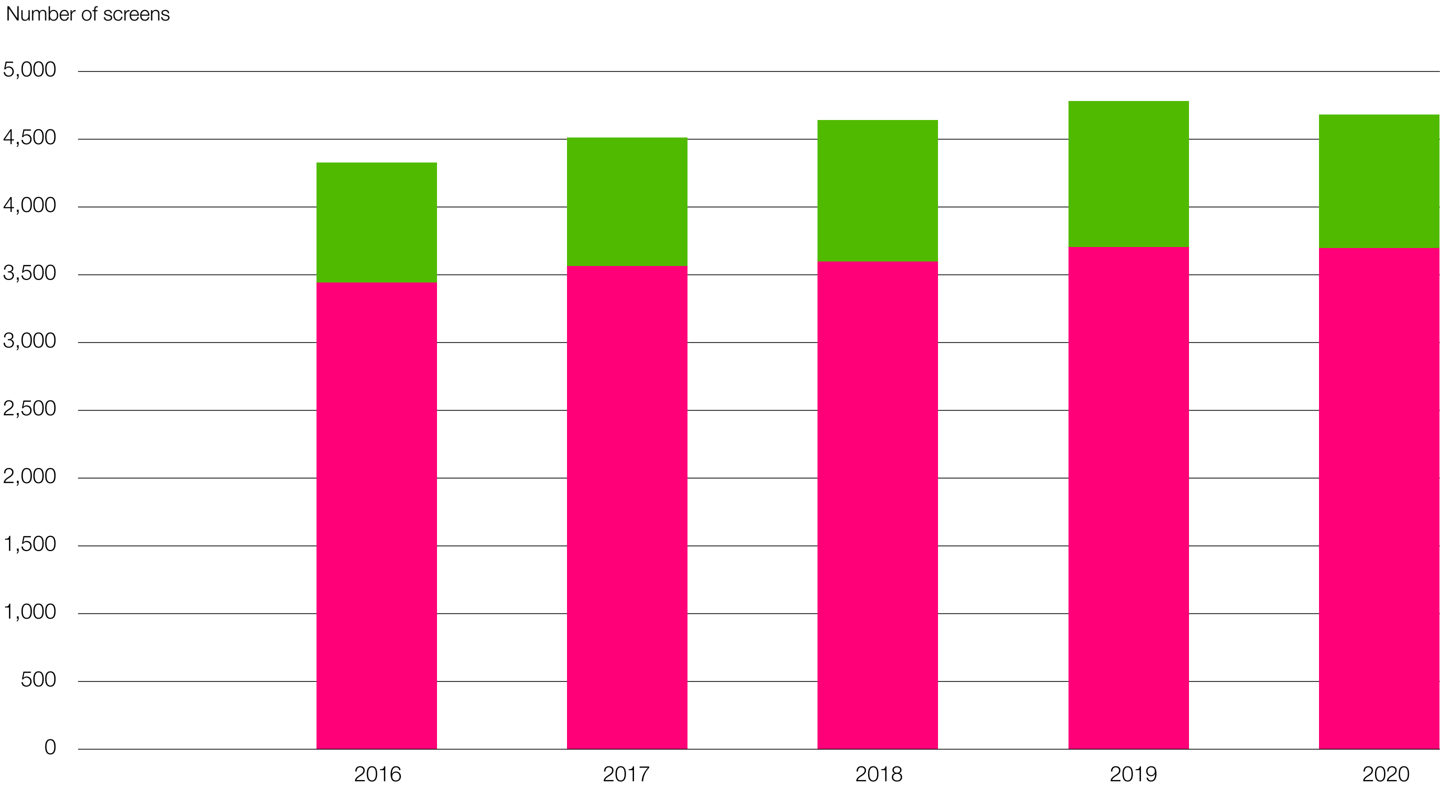
Multiplexes are defined as any cinema with five screens or more.

Traditional sites are defined as any cinema with four screens or fewer; mixed-use venues are sites that only screen films on an occasional or part-time basis.

UK cinema screens

Figure 2 shows the overall number of cinema screens in the UK between 2016 and 2020. As with cinema sites, the number of screens increased each year between 2016 and 2019 before falling (from 4,782 to 4,682) in 2020. The number of multiplex screens decreased by just under 1% between 2019 and 2020 (from 3,703 to 3,697), while traditional/ mixed-use screens decreased by 9% (from 1,079 to 985). The share of multiplex screens in the UK in 2020 was 79%, up from 77% in 2019.

Figure 2 UK cinema screens by type of cinema, 2016-2020



	2016	2017	2018	2019	2020
Traditional and mixed-use	885	948	1,043	1,079	985
Multiplex	3,442	3,564	3,597	3,703	3,697
Total sites	4,327	4,512	4,640	4,782	4,682
% multiplex sites	79.5	79.0	77.5	77.4	79.0

Source: BFI, Comscore
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. In 2020, screen density in the UK was 7.0 screens per 100,000 people. Data provided by Omdia show that this level of access to screens falls short of the numbers in some other major film territories: USA (12.4), France (9.4), Australia (8.8) and Spain (7.7). Italy and Germany's screen density, at 6.7 and 5.4 screens per 100,000 people respectively, was lower than the UK's.

For the fifth consecutive year, China was the world's fastest expanding territory, gaining more than 5,500 additional cinema screens, which increased its number of screens per 100,000 people from 4.9 in 2019 to 5.3.

Table 1 shows the level of admissions per head of population in a number of major film territories. Cinema attendances in 2020 fell substantially compared with 2019 for all listed territories: the fall-off in admissions per capita ranged from 67% in Australia to 81% in the USA. The UK had a similar level of admissions per head of population to Spain (0.6), despite having a lower screen density, but saw more admissions per capita than Italy and Germany. Of the selected territories, Australia (1.1) had the highest admissions per head of population.

Table 1 Admissions per head of population in selected major film territories, 2011-2020 (ranked by 2020 admissions)

Country	Australia	France	USA	UK	Spain	Italy	Germany
2011	3.8	3.4	3.8	**2.7**	2.1	1.7	1.6
2012	3.8	3.2	3.9	**2.7**	2.0	1.5	1.7
2013	3.5	3.0	3.8	**2.5**	1.7	1.6	1.6
2014	3.3	3.2	3.6	**2.4**	1.9	1.5	1.5
2015	3.8	3.1	3.8	**2.6**	2.0	1.6	1.7
2016	3.8	3.2	3.8	**2.5**	2.2	1.7	1.5
2017	3.5	3.2	3.5	**2.6**	2.1	1.5	1.5
2018	3.6	3.0	3.7	**2.6**	2.1	1.4	1.3
2019	3.4	3.2	3.5	**2.6**	2.2	1.6	1.4
2020	1.1	1.0	0.7	**0.6**	0.6	0.5	0.5

Source: Omdia
Note: Data updated since publication of the 2020 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 7.3 screens per 100,000 people, was lower than that of Northern Ireland (12.4), Northern Scotland (7.7) and the South West (7.7). The Midlands had the lowest screen density (6.0) of all the ISBA regions followed by the North East (6.2) and Yorkshire (6.3).

The average cost of a cinema ticket in the UK in 2020 was £6.98, down from £7.12 in 2019. Although this was the third consecutive year to see a decrease in the average ticket price, the fall in 2020 can partly be explained by the reduced-price tickets offered by many venues in the second half of the year in a bid to encourage audiences to return to cinemas when they reopened.

Table 2 Screens and admissions by ISBA TV region, 2020 (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	12.4	236	5.0	32	1.9	1.4	5,853	0.7	5.45
Northern Scotland	7.7	101	2.2	31	1.3	0.8	8,030	0.6	6.44
South West	7.7	139	3.0	52	1.8	1.1	8,262	0.6	5.87
Central Scotland	7.3	283	6.0	53	3.9	2.8	9,866	0.7	6.55
Wales	7.3	229	4.9	63	3.1	1.7	7,448	0.5	5.56
London	7.3	995	21.3	190	13.7	10.2	10,283	0.7	8.43
Border	7.1	44	0.9	20	0.6	0.3	6,809	0.5	6.34
West	7.0	172	3.7	43	2.5	1.6	9,348	0.7	6.61
North West	6.9	498	10.6	78	7.2	4.6	9,218	0.6	6.31
East of England	6.7	338	7.2	75	5.0	3.6	10,574	0.7	7.02
South and South East	6.7	513	11.0	128	7.7	5.3	10,403	0.7	7.08
Yorkshire	6.3	411	8.8	76	6.5	3.8	9,259	0.6	6.41
North East	6.2	173	3.7	37	2.8	1.7	9,843	0.6	6.03
Midlands	6.0	550	11.7	107	9.1	5.0	9,081	0.5	6.94
Total	**7.0**	**4,682**	**100.0**	**985**	**67.1**	**44.0**	**9,394**	**0.7**	**6.98**

Source: BFI, Comscore, Cinema Advertising Association (CAA), Office for National Statistics (ONS)
Notes:
See notes to Figure 1.
Figures may not sum to totals due to rounding.
Average ticket price is calculated by dividing the region's box office gross for the year by its admissions.

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 greatest number of screens per 100,000 people in 2020 (12.5), followed by London (7.8) and Scotland and the South West (7.3). The East Midlands had the fewest screens per 100,000 people at 5.5, followed by the North East (5.9) and East of England (6.2).

Table 3 Screens and population in the nations and regions, 2020 (ranked by screens per 100,000 people)

Nation/region	Screens per 100,000 people	Screens	% of total screens	Sites	Population (million)	Average number of screens per site
Northern Ireland	12.5	236	5.0	32	1.9	7.4
London	7.8	705	15.1	127	9.0	5.6
Scotland	7.3	398	8.5	94	5.5	4.2
South West	7.3	412	8.8	117	5.7	3.5
Wales	7.2	229	4.9	63	3.2	3.6
North West	7.1	520	11.1	80	7.4	6.5
South East	6.6	609	13.0	149	9.2	4.1
Yorkshire and The Humber	6.6	363	7.8	67	5.5	5.4
West Midlands	6.3	373	8.0	73	6.0	5.1
East of England	6.2	389	8.3	89	6.3	4.4
North East	5.9	159	3.4	30	2.7	5.3
East Midlands	5.5	266	5.7	53	4.9	5.0
England sub-total	**6.7**	**3,796**	**81.1**	**785**	**56.6**	**4.8**
Other	n/a	23	0.5	11	n/a	2.1
Total	**7.0**	**4,682**	**100.0**	**985**	**67.1**	**4.8**

Source: BFI, Comscore, Office for National Statistics (ONS)
Notes:
See notes for Figure 1
n/a = not available.
Figures/percentages may not sum to totals/sub-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 greatest number of multiplex screens (568) in 2020, followed by the South East (462) and the North West (447). Northern Ireland had the highest proportion of multiplex screens (94%) followed by the North West (86%) and Yorkshire and The Humber and the North East (both at 83%). In England the lowest concentration of multiplex screens was found in the South West (64%), which also had the greatest number of traditional and mixed-use screens (148). Across the nations, after Northern Ireland, Wales and England had the highest proportion of multiplex screens (both at 79%), followed by Scotland (73%).

Table 4 Cinema screens by type by nation or region, 2020 (ranked by percentage multiplex)

Nation/region	Multiplex	% multiplex	Traditional and mixed-use	Total
Northern Ireland	222	94.1	14	236
North West	447	86.0	73	520
Yorkshire and The Humber	302	83.2	61	363
North East	132	83.0	27	159
West Midlands	306	82.0	67	373
East Midlands	217	81.6	49	266
London	568	80.6	137	705
Wales	181	79.0	48	229
South East	462	75.9	147	609
East of England	295	75.8	94	389
Scotland	291	73.1	107	398
South West	264	64.1	148	412
England sub-total	**2,993**	**78.8**	**803**	**3,796**
Other	10	43.5	13	23
Total	**3,697**	**79.0**	**985**	**4,682**

Source: BFI, Comscore
See notes to Figure 1.

Exhibitors

In 2020, the three largest exhibitors owned 31% of cinemas and 60% of screens in the UK (Table 5). Cineworld had the highest share of total UK screens (23%) and its network of Picturehouse cinemas accounted for an additional 2%. Odeon operated the greatest number of sites (114) and had 19% of screens, while Vue had 88 sites and 18% of screens. In Northern Ireland, the Omniplex chain (which operates across the island of Ireland) had a dominant position, operating 47% of cinemas and 50% of screens in 2020, something that is unmatched in any of the other nations of the UK.

Table 5 Cinema screens by exhibitors with 20 or more screens, ranked by number of screens, 2020

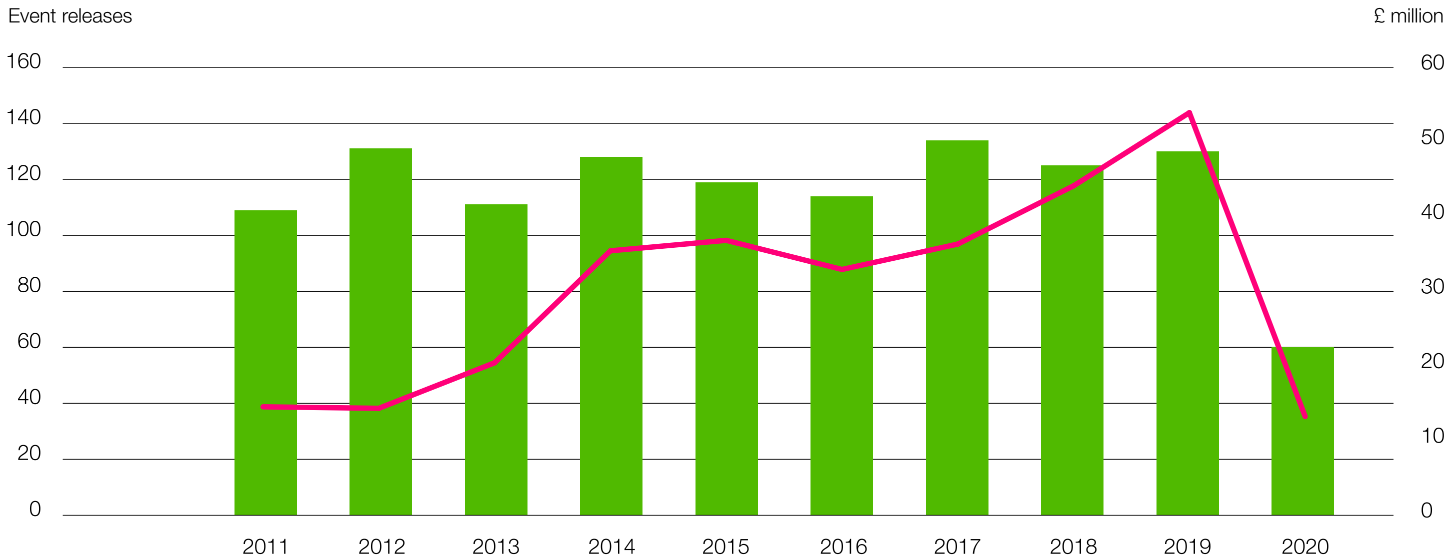
Exhibitor	Sites	Screens	% of total screens
Cineworld	101	1,071	22.9
Odeon	114	898	19.2
Vue	88	844	18.0
Showcase Cinemas	21	279	6.0
Empire Cinemas	15	135	2.9
Omniplex	15	117	2.5
Everyman	35	114	2.4
Picturehouse (Cineworld)	26	93	2.0
Light Cinemas	10	76	1.6
Reel Cinemas	15	68	1.5
Movie House Cinemas	5	46	1.0
Curzon Cinemas	15	43	0.9
Merlin Cinemas	16	40	0.9
Irish Multiplex Cinemas	5	34	0.7
Savoy Cinemas	5	25	0.5
Parkway Entertainment	4	20	0.4
Other (includes other independent chains and individual cinemas/multi-use venues)	495	779	16.6
Total	**985**	**4,682**	**100.0**

Source: Comscore, BFI RSU
Notes:
Data for 2020 are not directly comparable with those in previous Yearbooks, as these are based on information from sites that actively reported revenue to Comscore during the year.
See notes to Figure 1.
Percentages may not sum to 100 due to rounding.

Event cinema

Figure 3 shows the volume and value of event cinema releases between 2011 and 2020. Event cinema, or alternative content, can include special screenings of documentaries, films or TV content, but screenings of musical or theatrical performances are the most common types of release. As such, event cinema was doubly hit by the effects of the pandemic in 2020: not only were cinemas closed or operating under reduced capacity limits for most of the year, live performances themselves were similarly curtailed. (The planned event organised by London-based Secret Cinema, whose immersive screenings had dominated the box office charts for event cinema releases in recent years, was postponed until 2021, and subsequently to 2022.) There was a significant contraction in the event cinema market in 2020, following an overall upward trend from 2010 to 2019: the number of new events released was down 54% compared with 2019 while box office receipts were down 78%.

Figure 3 Total number of event cinema releases and box office earnings, UK and Republic of Ireland, 2011-2020



	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Number of event releases	109	131	111	128	119	114	134	125	130	60
Box office (£ million)	12.7	12.5	18.6	33.6	35.0	31.1	34.5	42.3	52.1	11.4

Source: Comscore
Note: Only includes new event cinema releases.

According to Comscore, there were 60 new event cinema releases in 2020, down from 130 in 2019 (Table 6). These events generated a total box office of £11 million, down from a record £52 million in 2019. Ballet/dance and popular music concerts had the greatest number of releases in 2020 with 10 each while releases of theatre performances generated the highest earnings (£2.6 million), a 23% share of the total box office for this type of programming.

Table 6 Number and box office takings of event cinema releases in the UK and Republic of Ireland by type of event, 2020 (ranked by gross box office)

Type of event	Number of events	% of events	Gross box office (£ million)	% of gross box office
Theatre	5	8.3	2.63	23.1
Classical music concert	6	10.0	2.56	22.5
Ballet/dance	10	16.7	2.50	22.0
Opera	9	15.0	1.52	13.3
Popular music concert	10	16.7	0.81	7.1
Documentary	9	15.0	0.61	5.4
Anime	2	3.3	0.47	4.1
Children's TV special	5	8.3	0.16	1.4
Exhibition	3	5.0	0.12	1.0
Comedy	1	1.7	0.01	<0.1
Total	**60**	**100.0**	**11.40**	**100.0**

Source: Comscore, BFI RSU
Notes:
Percentages/figures may not sum to totals due to rounding.
Only includes new event cinema releases.

Top 10 event cinema releases 2020

Eight of the top 10 event cinema releases in 2020 were shown before the initial cinema restrictions came into force in March of that year, the majority of which were live event releases. The two remaining releases (*David Attenborough: A Life on Our Planet* and *Break the Silence: The Movie*) were produced with footage captured before the pandemic. *Andre Rieu: 70 Years Young*, released at the beginning of January, was 2020's highest grossing event cinema title with earnings of £2 million (Table 7), and the Dutch conductor's most successful release to date. As an indication of the impact of the pandemic on cinema attendances, whilst every Andre Rieu release from 2016 to early 2020 earned between £1.4 million and £2.0 million, his second release of 2020 (Q3) *Andre Rieu's Magical Maastricht: Together in Music* earned just £0.2 million.

Table 7 Top 10 Event cinema releases in the UK and Republic of Ireland, 2020

Rank	Title	Type	Country of origin	Distributor	Locations Opening Week	Gross box office (£ million)
1	Andre Rieu: 70 Years Young	Classical music concert	Nld	Piece of Magic	628	2.04
2	Kinky Boots - The Musical	Theatre	UK	Trafalgar	613	1.45
3	Cyrano de Bergerac - NT Live 2020	Theatre	UK	NT Live	598	0.90
4	Riverdance 25th Anniversary Show	Ballet/dance	Ire	Trafalgar	424	0.67
5	The Sleeping Beauty - ROH, London 2019/20	Ballet/dance	UK	ROH	518	0.66
6	La Boheme - ROH, London 2019/20	Opera	UK	ROH	524	0.60
7	The Cellist/Dances at a Gathering - ROH, London 2019/20	Ballet/dance	UK	ROH	496	0.51
8	Porgy and Bess - Met Opera 2020	Opera	USA	Trafalgar	214	0.50
9	David Attenborough: A Life on Our Planet	Documentary	UK	Altitude	527	0.45
10	Break the Silence: The Movie	Popular music concert	Kor	Trafalgar	354	0.40

Source: Comscore, BFI RSU

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