DISTRIBUTION

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Cover image: *After We Collided* courtesy of Shear Entertainment

FACTS IN FOCUS

For the majority of 2020, cinemas were closed or operating at limited capacity due to the COVID-19 pandemic, causing distributors to delay the release of a large number of films, including planned tentpole releases. The total box office for all films on release in the year was £311 million, a fall of 76% from £1.3 billion in 2019.

- Films from the top 10 distributors generated 92.5% of the total box office for all titles on release in 2020.
- Entertainment One was the top earning distributor in 2020, with 30 films making £49 million at the UK and Republic of Ireland box office (including the top earning release of the year, *1917*, which grossed £44 million).
- Entertainment Film Distributors was the top earning distributor of UK independent films released in 2020, with its sole release *The Gentlemen* grossing £12 million.
- StudioCanal was the top earning distributor of foreign language films released in 2020, with nine releases grossing £12 million.
- In 2020, 63% of box office revenue was taken during weekends (Friday to Sunday), up from 59.5% in 2019.

Distribution

Distributors – all films on release

The distribution sector faced many challenges in 2020 due to the COVID-19 pandemic. All cinemas temporarily closed in March, the gradual re-opening of cinemas in Q3 was impacted by continued social distancing measures which limited capacity, and there were additional nationwide closures in Q4. As a consequence, a substantial number of planned releases from Q2 onwards were delayed into 2021.

Table 1 shows box office takings by distributor for all films on release in the UK and Republic of Ireland during 2020 (including titles released prior to 2020). The overall box office gross for all films on release in 2020 (£311 million) was just 24% of 2019's figure (£1.3 billion). The top 10 distributors had a market share of 92.5% (down from 95% in 2019) from 392 titles on release (up from 310 in 2019). In total, 926 films were on release in 2020, down from 1,154 in 2019. For the first time since our records began in 1997, an independent distributor, Entertainment One, was the top earning distributor, with 30 films on release (including 2020's highest grossing release, *1917*) generating revenues of £49 million.

After re-opening in Q3, many cinemas chose to schedule a variety of popular, older films to entice audiences back, with many films being picked from the Film Distributors' Association's *Relaunching Cinema: Content for Recovery* collection. This is reflected in the increased share of older films (59% of all films on release in 2020, compared with 30% in 2019).

For eight of the top 10 distributors the majority of box office revenues were generated by films initially released before Q2 (including Walt Disney, whose highest grossing film in the year was 2019's *Star Wars: The Rise of Skywalker*). For Warner Bros, however, its Q3 and Q4 releases, which included *Tenet, Wonder Woman 1984, Cats & Dogs: Paws Unite!* and *Bill & Ted Face the Music*, generated a greater cumulative gross than its earlier releases. Shear Entertainment also found success with its Q3 release *After We Collided.*

Table 1 Distributor share of box office, UK and Republic of Ireland, all films on release 2020

Distributor	Market share in 2020 (%)	Number of films on release in 2020	Box office gross in 2020 (£ million)	Number of films on release in 2019
Entertainment One	15.9	30	49.4	28
Sony	15.6	38	48.4	39
Walt Disney	14.3	58	44.3	47
Universal	12.5	73	39.0	55
Warner Bros	11.7	89	36.5	64
Paramount	8.0	22	25.0	13
Lionsgate	4.5	29	14.0	23
StudioCanal	4.5	46	13.9	31
Entertainment Film Distributors	4.3	6	13.3	10
Shear Entertainment*	1.3	1	4.0	n/a
Top 10	92.5	392	287.8	310
Other distributors (143)	7.5	534	23.2	844
Total	**100.0**	**926**	**311.0**	**1,154**

Source: Comscore
Notes:
Box office gross = cumulative total for all films handled by the distributor in the period 3 January 2020 to 31 December 2020.
Number of films on release in 2019 updated since publication of the 2020 Yearbook due to Comscore adjustments.
Figures may not sum to sub-totals/totals due to rounding.
* Shear Entertainment also released one film in 2020 in conjunction with The Movie Partnership, and two films in 2019 in conjunction with Noah Media and Spirit Entertainment.

Table 2 shows the top 10 distributors by market share between 2011 and 2020. Nine of the 2020 top 10 have appeared in the list before, six of which have featured in every top 10 list over the period. The exceptions are Lionsgate, Optimum/StudioCanal and Entertainment Film Distributors, which have appeared nine times, and Shear Entertainment, which features in the list for the first time. From 2011-2019 the average market share for distributors outside the top 10 was 4%, however, in 2020 this increased to 7.5%, the highest share since 2009.

Table 2 Distributor market share as percentage of box office gross, 2011-2020 (ranked by 2020 market share)

Distributor	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Entertainment One	5.1	6.7	9.0	8.0	3.9	8.4	2.5	3.2	3.8	15.9
Sony	7.2	18.0	8.7	6.2	11.8	6.6	10.3	10.7	9.3	15.6
Walt Disney	8.7	10.2	15.2	10.1	20.0	23.2	19.7	23.6	37.9	14.3
Universal	11.8	10.7	15.1	11.2	21.6	14.0	16.0	19.5	13.9	12.5
Warner Bros	18.2	12.9	17.2	15.9	9.0	15.6	16.6	13.9	12.4	11.7
Paramount	16.3	7.7	7.8	5.8	4.0	5.4	3.7	4.8	5.9	8.0
Lionsgate	-	5.7	4.7	5.5	4.0	4.0	6.3	1.5	4.2	4.5
Optimum/StudioCanal[1]	3.8	-	2.8	6.7	4.7	1.5	4.2	2.8	1.0	4.5
Entertainment Film Distributors	6.7	3.1	1.9	5.2	1.6	1.5	1.7	1.1	-	4.3
Shear Entertainment	-	-	-	-	-	-	-	-	-	1.3
20th Century Fox[2]	12.1	16.1	13.1	21.8	14.9	15.7	15.1	14.5	5.7	-
STX Entertainment	-	-	-	-	-	-	-	-	1.2	-
Momentum[3]	4.6	4.3	-	-	-	-	-	-	-	-
Top 10 total[4]	94.4	95.4	95.5	96.3	95.5	95.9	96.1	95.5	95.4	92.5
Others	5.6	4.6	4.5	3.7	4.5	4.1	3.9	4.5	4.6	7.5
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 Optimum Releasing, the UK subsidiary of StudioCanal, was rebranded as StudioCanal in September 2011.
2 20th Century Fox films released after October 2019 are categorised as Walt Disney distributed releases.
3 Momentum was taken over by Entertainment One in January 2014.
4 Top 10 total refers to the top 10 distributors of that particular year.

Distributors – foreign language and UK independent films released in 2020

Foreign language films accounted for 36% of new releases at the UK and Republic of Ireland box office in 2020, grossing a total of £18 million (7% of the total box office for films released in 2020). Fifty-two distributors handled 136 foreign language film releases in the year. The top 10 distributors released 34% of these films, which accounted for 90% of the total box office for foreign language films.

StudioCanal was the year's top earning foreign language film distributor (Table 3). Its Q1 release of the South Korean film *Parasite* became the UK's all-time highest grossing foreign language film, with earnings of £12 million, 66% of the overall box office for non-English language releases. (For more on the year's top earning foreign language titles, see the Top films in 2020 chapter.)

Table 3 Top 10 distributors of foreign language films in the UK and Republic of Ireland, 2020 (ranked by box office gross)

Distributor	Number of foreign language films released in 2020	Average widest point of release	Box office gross (£ million)
StudioCanal	9	87	12.3
Magnetes Pictures	8	92	0.7
Signature Entertainment	3	136	0.6
Curzon Artificial Eye	7	16	0.6
National Amusements	1	268	0.6
Cinestaan AA Distributors	3	53	0.4
Sun Media	7	20	0.4
Hamsini Entertainment	5	45	0.4
Phoenix	1	256	0.3
Walt Disney	1	116	0.3

Source: Comscore
Box office gross = cumulative total up to 18 February 2021.

In total, 54 distributors released independent UK films in 2020, generating a combined box office gross of £35 million (14% of the total box office for films released in 2020) from 91 releases. The 25 films released by the top 10 distributors of independent UK titles accounted for £33 million, which equates to 95% of the box office generated by these films (Table 4). Entertainment Film Distributors had the largest share of box office for UK independent films from one title, the Q1 release *The Gentlemen*.

Table 4 Top 10 distributors of UK independent films in the UK and Republic of Ireland, 2020 (ranked by box office gross)

Distributor	Number of UK independent films released in 2020	Average widest point of release	Box office gross (£ million)
Entertainment Film Distributors	1	516	12.3
Lionsgate	4	375	9.1
Universal	3	327	7.6
StudioCanal	4	122	1.0
Sony	2	277	0.8
Paramount	2	365	0.8
Sky Cinema	1	201	0.7
Walt Disney	1	511	0.5
Altitude Film Distribution	2	65	0.3
Signature Entertainment	5	48	0.2

Source: Comscore, BFI RSU analysis
Box office gross = cumulative total up to 18 February 2021.

Width of release

Table 5 shows the number and share of films released in the UK and Republic of Ireland from 2016 to 2020 by widest point of release (WPR). As in previous years, in 2020 the majority of films (58%) were shown at fewer than 50 sites at their widest point of release. Of the 20 films with a WPR of 500 or over, 16 were Q1 releases. Only one Q3 or Q4 release – *Tenet* – was shown at 600 sites or over.

Table 5 Number and share of releases by widest point of release, 2016-2020

	2016		2017		2018		2019		2020	
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	21	2.6	29	3.8	15	1.9	38	5.0	9	2.4
500-599	40	4.9	34	4.5	43	5.5	34	4.5	11	2.9
400-499	45	5.5	33	4.3	40	5.1	32	4.2	17	4.5
300-399	19	2.3	24	3.2	22	2.8	26	3.4	13	3.4
200-299	18	2.2	24	3.2	29	3.7	16	2.1	21	5.5
100-199	59	7.2	53	7.0	53	6.7	58	7.6	46	12.0
50-99	58	7.1	79	10.4	82	10.4	77	10.1	44	11.5
10-49	244	29.7	224	29.5	224	28.5	256	33.5	110	28.8
<10	317	38.6	260	34.2	279	35.5	227	29.7	111	29.1

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

Weekend box office

In 2020, 63% of box office revenue was generated during weekends (Friday to Sunday), up from 59.5% in 2019 (Table 6). This is the only year between 2011 and 2020 that the weekend share was above 60% and may be due, in part, to some cinemas only opening at weekends during the latter part of the year. The pattern of box office takings by day has remained largely consistent throughout the period with the exception of the middle of the working week, which was boosted for the first few years by the 'Orange/EE Wednesdays' promotion.

Table 6 Box office percentage share by weekday/weekend 2011-2020

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Friday	16.6	16.4	15.8	15.3	15.3	16.1	15.7	15.5	15.3	16.1
Saturday	23.8	24.1	24.9	25.2	23.9	24.6	24.7	24.1	24.6	27.2
Sunday	17.6	17.6	18.2	18.8	18.8	18.3	18.9	19.1	19.6	20.0
Weekend	**57.9**	**58.1**	**58.9**	**59.2**	**58.1**	**58.9**	**59.2**	**58.7**	**59.5**	**63.2**
Monday	9.2	9.3	8.9	9.1	9.5	9.7	8.7	9.6	9.6	8.1
Tuesday	9.1	9.3	9.4	9.4	10.6	10.4	10.3	10.0	10.1	9.4
Wednesday	13.9	13.4	12.6	12.4	10.8	10.9	11.3	11.2	10.0	9.9
Thursday	9.8	9.8	10.2	9.8	10.9	10.1	10.6	10.6	10.9	9.3
Weekday	**42.1**	**41.9**	**41.1**	**40.8**	**41.9**	**41.1**	**40.8**	**41.3**	**40.6**	**36.8**

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

The opening weekend is recognised as being crucial to the success of a film, as a strong opening may encourage exhibitors to continue to screen a film. In 2020, 27% of total theatrical revenue was generated during opening weekends, the second lowest figure of the period (Table 7). Only one film – *1917* – made more than £30 million in 2020, and no films made between £20 million-£29.9 million (compared with 10 and seven films respectively in 2019).

For many films the opening weekend box office represents a significant proportion of their final theatrical gross. As in previous years, in 2020, films that made less than £1 million at the box office tended to make more of their total box office revenue in their opening weekend than higher grossing films.

Table 7 Opening weekend as percentage of total box office, by box office band, 2011-2020

Range of box office (£ million)	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
>=30	29.4	27.0	24.0	27.1	32.2	27.2	26.5	26.9	30.1	16.9
20-29.9	22.6	22.4	30.9	21.9	25.9	28.0	33.3	24.7	24.7	-
10-19.9	27.6	24.6	27.6	30.9	25.6	29.1	28.5	25.3	24.8	25.2
5-9.9	26.2	26.1	28.4	25.9	28.7	32.2	33.2	29.5	28.7	30.7
1-4.9	32.2	31.8	32.1	30.3	32.3	33.1	32.1	34.5	31.0	30.3
0.2-0.9	35.5	37.7	37.0	36.7	37.3	37.7	35.1	35.6	39.1	42.1
<0.2	38.5	37.8	38.3	40.0	39.6	39.6	41.4	41.6	43.9	43.0
All films	**28.1**	**26.8**	**28.4**	**27.9**	**29.9**	**29.8**	**29.9**	**27.9**	**28.9**	**27.4**

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

With distributors having significantly fewer new films to promote in 2020 due to the pandemic, advertising spend was down substantially compared with previous years. Nielsen estimates that the total advertising spend by distributors in 2020 was £48 million, around a quarter of the figure in 2019 (Table 8).

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 20% of the total advertising spend for film in 2020. However, as the data for this category are not wholly comprehensive, we believe this share to be an underestimate.

Table 8 Estimated advertising spend 2011-2020 (£ million)

Medium	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
TV	90.8	89.1	89.2	101.0	102.2	93.3	81.1	79.2	67.2	14.5
Outdoor	69.1	67.2	71.2	64.2	60.5	52.8	56.5	54.9	73.1	19.1
Press	22.0	21.5	20.7	24.2	21.3	14.9	14.0	10.8	9.2	2.3
Radio	6.8	6.8	5.9	4.6	7.4	5.7	12.1	8.7	11.1	2.7
Sub-total	188.7	184.6	187.0	194.0	191.4	166.7	163.7	153.6	160.6	38.5
Digital*	8.5	4.0	2.5	1.1	0.7	46.4	65.5	43.7	40.5	9.9
Total	**197.2**	**188.6**	**189.4**	**195.1**	**192.1**	**213.1**	**229.5**	**197.5**	**201.1**	**48.4**

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 2011-2013, 2014-2015 and 2016-2020.

Table 9 shows the share of advertising spend on traditional media (television, outdoor, print and radio) only from 2011 to 2020. It does not include digital advertising activity due to the reporting limitations described above.

While expenditure on TV advertising had consistently accounted for around half of the total spend on traditional media up until 2018, it fell to 42% in 2019 and to 38% in 2020. In both 2019 and 2020 the category with the highest spend was outdoor advertising; in 2020 it accounted for 49.5% of total expenditure on traditional media.

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 2011 to 6% in 2019 and 2020. Conversely, the share of advertising spend allocated to radio has seen an overall increase during the period, rising from 4% in 2011 to 7% in 2019 and 2020.

Table 9 Share of traditional media advertising spend, 2011-2020

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
TV	48.1	48.3	47.7	52.1	53.4	56.0	49.5	51.6	41.8	37.6
Outdoor	36.6	36.4	38.1	33.1	31.6	31.7	34.5	35.7	45.5	49.5
Press	11.7	11.6	11.1	12.5	11.1	8.9	8.6	7.0	5.7	5.9
Radio	3.6	3.7	3.2	2.4	3.9	3.4	7.4	5.7	6.9	6.9
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
Notes:
See notes to Table 8.
Percentages may not sum to 100 due to rounding.

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