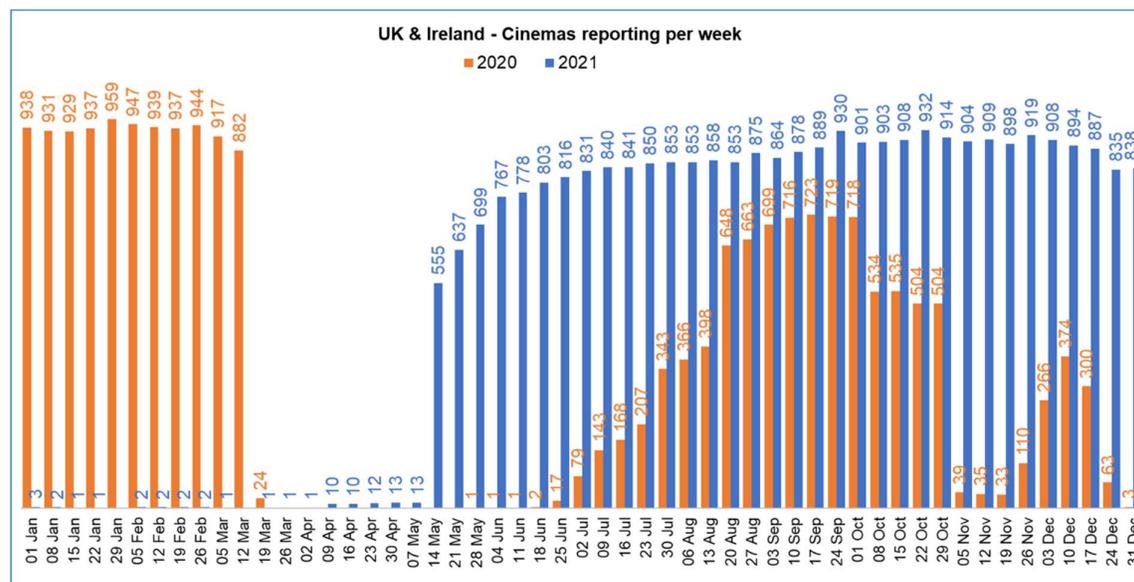


## UK & Ireland 2021 Box Office Review – Comscore Movies

Total box office revenue across UK & Ireland in 2021 was £596,923,252, an increase of 85% versus 2020's total of £323,275,476. Prior to the pandemic, annual box office exceeded £1.3 billion in each of the five years up to 2019. Cinemas were closed for the first 19 weeks of 2021, allowed to reopen from Monday 17<sup>th</sup> May, and have not been subject to enforced closures in any UK nation since.

While the last two years were both affected by periods of lockdown in response to rising COVID-19 case rates, the shape of the reopening was very different in 2021. As the chart below shows, when cinemas were permitted to reopen in mid-May 2021 there was a swift and sustained response, due in large part to a strong slate of film releases. Within four weeks, over 700 cinemas had reopened, a milestone it took over ten weeks to reach in 2020 due to regional restrictions and a shortage of new releases. 2020 also suffered from the reintroduction of closures at different times in the various nations, making it difficult to coordinate UK-wide film releases. This was thankfully not repeated in 2021, in the main due to the widespread rollout of the COVID vaccination programme.



Going into 2022, all cinemas now remain open, with face coverings required except when eating or drinking, and additional Omicron restrictions in some nations including:

- Wales: Proof of vaccination/immunity; social distancing and maximum party size of six
- Scotland: Social distancing
- Republic of Ireland: 8pm curfew; 50% capacity cap; proof of vaccination/immunity
- Northern Ireland: Proof of vaccination/immunity.

497 new titles were released into cinemas in 2021, up from 444 in 2020. We expect 2022 to return to the usual volume, which peaked in 2019 at 938 new releases. Looking only at the period when cinemas were able to open, 2021 had just 20% fewer titles released mid-May to December than 2019, which had 625 releases in the equivalent period.

Following the opening of 31 drive-in cinemas in 2020, eight of these sites continued to operate and were joined by six new openers in 2021. These 14 drive-ins contributed over £1m to the box office this year, down from £1.6m in 2020. They were the only available out-of-home cinema venues in April and early May.

Final 2021 admission figures are not yet available; the total is expected to be in the region of 74 million in the UK and close to 6 million in Republic of Ireland. This would be almost 70% up from 2020's total admissions of 47.6 million for UK & Ireland combined, which represented a fall of three-quarters from 2019's total of 191.1 million.

Across the five nations, Northern Ireland and Wales had the strongest recovery in 2021, up 102% and 99% respectively from 2020. England and Scotland box office rose by 79-80%. Currently under the most onerous restrictions, Republic of Ireland had the smallest increase at 59%, the introduction of the 50% capacity cap from 7<sup>th</sup> December impacting ticket sales for the year's second-highest grossing film *Spider-Man: No Way Home* which opened 15<sup>th</sup> December.

Looking at audience demographics from our PostTrak exit poll, we continue to see a slight suppression of the older audience with 13% of interviewees aged 45+ versus the pre-pandemic average of 17%. However, this is likely to reflect the types of films being released rather than audience reluctance, as we saw that older audiences did attend for relevant titles. As well as the expected success of *No Time To Die* for this age group, we saw several other titles over-index for 45+ attendees including *Dream Horse*, *The Father*, *Stillwater*, *The Courier*, *Respect*, *The Many Saints Of Newark*, *Spencer* and *West Side Story*.

Top 10 films in UK & Ireland in 2021:

Data from 1<sup>st</sup> January 2021 to 6<sup>th</sup> January 2022

1. *No Time To Die* (Universal): £96.5m
2. *Spider-Man: No Way Home* (Sony): £74.8m – still on release
3. *Dune* (Warner Bros): £21.8m
4. *Shang Chi And The Legend Of The Ten Rings* (Disney): £21.2m
5. *Peter Rabbit 2* (Sony): £20.4m
6. *Black Widow* (Disney): £18.8m
7. *Venom: Let There Be Carnage* (Sony): £18.0m
8. *Free Guy* (Disney): £16.8m
9. *Fast & Furious 9* (Universal): £16.4m
10. *Eternals* (Disney): £14.8m

The reopening was kick-started by *Peter Rabbit 2* on 17<sup>th</sup> May, followed by *Fast & Furious 9* on 24<sup>th</sup> June and *Black Widow* on 7<sup>th</sup> July. The surprise hit of the summer was *Free Guy* (11<sup>th</sup> August). All held onto their spots in the Top 10 films of the year despite stiff competition in an unusually strong Q4. *No Time To Die* is the No.3 film of all time at the UK & Ireland box office, behind only *Star Wars: The Force Awakens* (£123.2m) and *Skyfall* (£103.2m). December release *Spider-Man: No Way Home* is No.10 in the all-time chart, grossing £11.0m in the latest week; it should shortly overtake 2019's *The Lion King* (£76.0m) and will then challenge *Titanic* for the No.8 spot (£80.2m). Also released in Q4, *Dune* became director Denis Villeneuve's biggest hit overtaking 2017's *Blade Runner 2049*. Disney had the most titles in the Top 10, led by *Shang Chi And The Legend Of The Ten Rings* at No.4.

Universal was the top distributor in 2021, taking £180.8m (30.3% of the total market) from 25 new releases and 27 pre-2021 releases. Although *No Time To Die* was their top release by some margin, a variety of other films contributed almost half of their total including *Fast & Furious 9*, *The Addams Family 2*, *The Croods 2: A New Age* and *House Of Gucci*. Sony and Disney were neck-and-neck with 21.9% and 21.0% share respectively. The other Top 5 distributors were Warner Bros (14.2%) and Paramount (3.6%), with other major players including Lionsgate, eOne, Park Circus, STXfilms and Studiocanal.

In total, 118 different distributors released films this year. The Top 10 distributors' films accounted for 95.7% of box office, the first time this figure has exceeded 95%, with *No Time To Die* single-handedly contributing 16% of the year's total.

Top 10 British films in UK & Ireland in 2021:

Data from 1<sup>st</sup> January 2021 to 6<sup>th</sup> January 2022

1. *No Time To Die* (Universal): £96.5m
2. *The King's Man* (Disney): £4.4m – still on release
3. *Spencer* (STXfilms): £2.8m
4. *People Just Do Nothing: Big In Japan* (Universal): £2.3m
5. *Last Night In Soho* (Universal): £2.3m
6. *The Father* (Lionsgate): £2.1m
7. *The Courier* (Lionsgate): £2.0m
8. *Harry Potter & The Philosopher's Stone (20<sup>th</sup> Anniversary)* (Warner Bros): £1.3m
9. *The Night House* (Disney): £977k
10. *A Boy Called Christmas* (Sky Cinema): £830k

The British films chart is dominated by *No Time To Die*. New release *The King's Man* takes the No.2 spot after just 12 days on release since Boxing Day. Building on the continuing interest in Diana, Princess of Wales following her portrayal in Netflix's *The Crown*, *Spencer* is the third-biggest British release of the year with £2.8m. Film production has been well-supported in the UK throughout the pandemic and we expect no interruption to the pipeline of British films. Kenneth Branagh's *Belfast* will be the first major release of 2022 on 21<sup>st</sup> January.

Phil Clapp, Chief Executive of the UK Cinema Association commented, "While the challenges presented to the sector by COVID during 2021 were still all too apparent, the extraordinarily positive public response to the return of cinemagoing in the second half of the year, and in particular their recognition of the huge efforts made by cinema operators to ensure the continuing safety and comfort of audiences and team members alike, augur extremely well for a strong and continued recovery in 2022 and beyond."

Andy Leyshon, Chief Executive Officer at the Film Distributors' Association added, "Once cinemas were permitted to reopen their doors, it was heartening to see audiences return in good numbers and cinemagoing reaffirm its position as the nation's favourite out-of-home entertainment choice. 2021 delivered some terrific titles and stellar big screen successes, and in 2022 the recovery story is set to continue with an even more diverse slate of films and something on offer for every taste."

Note: The 2021 date range was Friday 1<sup>st</sup> January 2021 to Thursday 6<sup>th</sup> January 2022 (53 weeks).