

The UK box office in 2018

BFI Research and Statistics Unit

31 January 2019

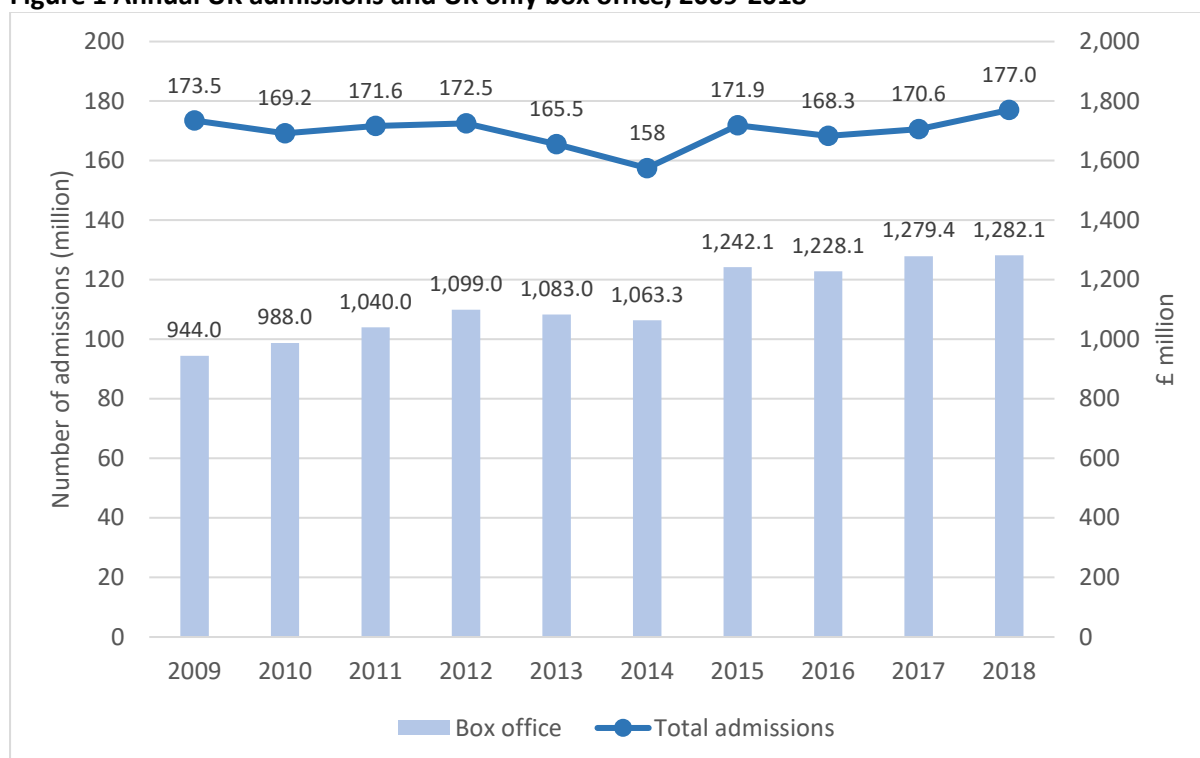
1. Key points

- UK cinema admissions in 2018 were 177 million, the highest level of admissions since 1970 and 3.7% up on 2017.
- The total box office in the UK and Republic of Ireland was £1,387 million, up 0.6% on 2017. The UK-only figure for the calendar year was £1,282 million up by 0.2% on the previous year.
- The highest grossing film released in 2018 was *Avengers: Infinity War*, with earnings of almost £71 million followed by *Mamma Mia: Here We Go Again!* (£66 million) and *Incredibles 2* (£56 million).
- The top 20 films earned £711 million at the box office, accounting for 55% of the total box office.
- *Darkest Hour* was the highest grossing independent UK film of 2018 with takings of £24 million. This was followed by *Johnny English Strikes Again* (£18 million) and *Three Billboards Outside Ebbing, Missouri* (£15 million). The Top 20 independent UK films accounted for 85% of the gross box office for all independent UK films.
- The market share of independent UK films was 12% (2.2% points higher than 2017), with the share of US studio-backed and other inward investment UK films at 33%. The market share of all UK films, at 45%, was the highest since records began in 2002.

2. UK cinema admissions

UK cinema admissions in 2018 were 177 million, the highest since 1970, when admissions were 193 million. Figure 1 shows the level of and change in admissions for the UK only box office since 2009. Admissions have stayed at around 170 million for most of the period, seeing a fall in 2014 to 158 million in 2014 and an increase of 3.7% from 171 million in 2016 to the high in 2017. The gross value of ticket sales in the UK and Republic of Ireland was £1,387 million, up slightly (0.6%) from £1,379 million on 2017. The UK-only figure for the calendar year was £1,282 million, again slightly up (0.2%) on 2017 (£1,279 million). The average ticket price in 2018 was £7.24, a drop of 26p (3.4%) from £7.50 in 2017.

Figure 1 Annual UK admissions and UK only box office, 2009-2018



Source: CAA, comScore

Data for the calendar year and the UK Only

Looking at admissions throughout 2018, the third quarter saw the highest and lowest admissions. At 19.2 million, August had the largest admissions of any month since August 2011 (which had admissions of 21 million). The month also had the largest increase in admissions (both in numbers and percentage terms) from the same month in the previous year, up by 32.8% from 14.5 million in 2017. This is due to the continued success of the top 20 films *Mamma Mia: Here We Go Again!*, *The Incredibles 2*, *Mission Impossible: Fallout* and *Hotel Transylvania 3: Summer Vacation*. The following month, September, saw the lowest admissions of the year, at 10.1 million. This is the lowest level of monthly admissions since 2014 (when admissions were 8.5 million) and the third consecutive year when there has been a decrease in admissions in this month. Trends usually show September to have lower admissions than other months.

The year started off with January showing an 8% uplift to over 16 million admissions compared to the same month in 2017. This was due to the on-going success of the Christmas 2016 and New Year 2017 releases of *Star Wars: The Last Jedi*, *The Greatest Showman* and *Jumanji: Welcome to the Jungle*. However, over the first quarter of the year admissions were down nearly 4% on 2017 despite the release of *Black Panther*, the fifth biggest film at the UK box office in 2018, and top earning independent UK films, *Darkest Hour* and *Three Billboards in Ebbing, Missouri*. The higher

admissions in the same months in 2017 were driven by *The LEGO Batman Movie*, *Beauty and the Beast* and *Fast and Furious 8*, all top performing films for that particular year.

May saw admissions increase by 21% on the same month in 2017, due to the release of *Avengers: Infinity War*, *Deadpool 2* and *Solo: A Star Wars Story*. June saw a fall in admissions from May, coinciding with the start of the heatwave and the FIFA World Cup. However, admissions were still nearly 9% higher than in June 2017, primarily due to the release of the sequel *Jurassic World: Fallen Kingdom*. July figures were down 12% on 2017 despite the release of the second and third highest grossing films of the year *Mamma Mia: Here We Go Again!* and *Incredibles 2*.

The final quarter of 2018 saw an increase in admissions to over 16 million in October; this was the second largest month on month increase in 2018. This is in part due to the release of the Academy Awards® nominated *A Star Is Born* and *Bohemian Rhapsody*, but also the same month in 2017 saw no releases make the Top 20 films released in the year. November saw a fall in admissions, even though this month saw the release of the latest instalment of the ‘Fantastic Beasts’ franchise. Compared to the same month last year, admissions in December were down nearly 9%. The top films of the month, *Mary Poppins Returns* and *Aquaman* did not quite match the strength of appeal of *Star Wars: The Last Jedi* released in December 2017.

Table 1 Monthly cinema admissions 2016-2018

	2016 (million)	2017 (million)	2018 (million)	% change on 2017
January	14.03	15.00	16.20	+8.0
February	15.35	16.48	16.10	-2.3
March	13.39	16.15	13.53	-16.2
April	13.13	15.64	15.50	-0.9
May	12.50	11.34	13.72	+21.0
June	10.71	9.58	10.41	+8.6
July	16.59	17.80	15.61	-12.3
August	18.09	14.47	19.22	+32.8
September	11.66	10.78	10.13	-6.0
October	15.19	12.11	16.05	+32.6
November	12.40	14.09	14.85	+5.4
December	15.22	17.16	15.67	-8.7
Total	168.26	170.62	177.00	3.7

Source: CAA, comScore

3. Top films released in 2018

The following analysis covers films released in the UK and Republic of Ireland in 2018, based on box office data up to and including 27 January 2019. The top 20 is dominated by sequels, franchises and re-makes with these films taking up 16 places (Table 2). The three highest grossing films released in 2018 were sequels: *Avengers: Infinity War* which earned almost £71 million, followed by *Mamma Mia: Here We Go Again!* (£66 million) and *Incredibles 2* (which earned 75% more than the first *Incredibles*). The top 20 films earned £711 million at the box office, accounting for 55% of the total box office. Seventeen of the top films earned £20 million or more; by contrast, all of the top 20 films in 2017 achieved this.

Table 2 Top 20 films released in the UK and Republic of Ireland, 2018

	Title	Country of origin	Box office Gross (£m)	Distributor
1	Avengers: Infinity War	UK/USA	70.8	Walt Disney
2	Mamma Mia: Here We Go Again!	UK/USA	65.5	Universal
3	Incredibles 2*	USA	56.2	Walt Disney
4	Bohemian Rhapsody*	UK/USA	52.0	20th Century Fox
5	Black Panther*	USA	50.6	Walt Disney
6	Mary Poppins Returns*	UK/USA	42.1	Walt Disney
7	Jurassic World: Fallen Kingdom	UK/USA	41.6	Universal
8	Peter Rabbit*	Aus/USA/UK	41.1	Sony Pictures
9	Fantastic Beasts: The Crimes of Grindelwald*	UK/USA	34.0	Warner Bros
10	Deadpool 2	USA	32.7	20th Century Fox
11	A Star Is Born	USA	29.9	Warner Bros
12	The Grinch	USA	27.8	Universal
13	Mission: Impossible Fallout	UK/USA	24.4	Paramount
14	Darkest Hour	UK	24.1	Universal
15	Aquaman*	USA	22.1	Warner Bros
16	Venom	UK/USA	20.2	Sony Pictures
17	Hotel Transylvania 3: A Monster Vacation*	USA	20.1	Sony Pictures
18	Solo: A Star Wars Story	UK/USA	19.4	Walt Disney
19	Coco*	USA	18.9	Walt Disney
20	Fifty Shades Freed	USA	17.8	Universal

Source: comScore

Notes:

Box office gross = cumulative gross up to 27 January 2019.

* Film still being exhibited on 27 January 2019.

Data is for UK and the Republic of Ireland. UK and Republic of Ireland are a single "territory" for film distribution purposes.

4. Top UK qualifying films released in 2018

The following analysis covers films released in the UK and Republic of Ireland in 2018, based on box office data up to and including 27 January 2019. The top 20 UK films are dominated by UK/USA productions (18 films) with the top two films repeating the top films of year: *Avengers: Infinity War* and *Mamma Mia: Here We Go Again* (Table 3). The Freddie Mercury biopic, *Bohemian Rhapsody* (£52 million) is in third place, followed by *Mary Poppins Returns* (£42 million), the sequel to the 1964 classic. The total box office of the top 20 UK qualifying films accounted for 87% of the gross box office for all UK qualifying films released in 2018.

Table 3 Top 20 UK qualifying films released in the UK and Republic of Ireland, 2018

	Title	Country of origin	Box office Gross (£m)	Distributor
1	Avengers: Infinity War	UK/USA	70.8	Walt Disney
2	Mamma Mia: Here We Go Again!	UK/USA	65.5	Universal
3	Bohemian Rhapsody*	UK/USA	52.0	20th Century Fox
4	Mary Poppins Returns*	UK/USA	42.1	Walt Disney
5	Jurassic World: Fallen Kingdom	UK/USA	41.6	Universal
6	Fantastic Beasts: The Crimes of Grindelwald*	UK/USA	34.0	Warner Bros
7	Mission: Impossible Fallout	UK/USA	24.4	Paramount
8	Darkest Hour	UK	24.1	Universal
9	Venom	UK/USA	20.2	Sony Pictures
10	Solo: A Star Wars Story	UK/USA	19.4	Walt Disney
11	Johnny English Strikes Again*	UK [#]	17.7	Universal
12	Ready Player One	UK/USA	16.1	Warner Bros
13	Three Billboards Outside Ebbing, Missouri	UK/USA [#]	15.3	20th Century Fox
14	Disney's Christopher Robin*	UK/USA	14.9	Walt Disney
15	Early Man	UK/Fra	11.2	StudioCanal
16	Sherlock Gnomes	UK/USA	9.5	Paramount
17	Tomb Raider	UK/USA	7.7	Warner Bros
18	Red Sparrow	UK/USA [#]	6.4	20th Century Fox
19	Widows*	UK/USA [#]	6.3	20th Century Fox
20	King of Thieves	UK	6.1	StudioCanal

Source: comScore, BFI RSU analysis

Notes:

Box office gross = cumulative gross up to 27 January 2019.

* Film still being exhibited on 27 January 2019.

[#] Film made with independent (non-studio) US support or with the independent arm of a US studio.

Data is for UK and the Republic of Ireland. UK and Republic of Ireland are a single "territory" for film distribution purposes.

5. Top independent UK films released in 2018

This analysis covers films released in the UK and Republic of Ireland in 2018, based on box office data up to and including the 27 January 2019. *Darkest Hour*, grossing £24 million, was the highest earning independent UK film of 2018 followed by *Johnny English Strikes Again* (£18 million) and *Three Billboards Outside Ebbing, Missouri* with £15 million (Table 4). The total box office for the top 20 independent UK films accounted for 86% of the gross box office of all independent UK films released in 2018.

Table 4 Top 20 independent UK films released in the UK and Republic of Ireland, 2018

	Title	Country of origin	Box office Gross (£m)	Distributor
1	Darkest Hour	UK	24.1	Universal
2	Johnny English Strikes Again*	UK [#]	17.7	Universal
3	Three Billboards Outside Ebbing, Missouri	UK/USA [#]	15.3	20 th Century Fox
4	Early Man	UK/Fra	11.2	StudioCanal
5	Red Sparrow	UK/USA [#]	6.4	20th Century Fox
6	Widows*	UK/USA [#]	6.3	20th Century Fox
7	King of Thieves	UK	6.1	StudioCanal
8	Isle of Dogs	UK/USA [#]	6.0	20th Century Fox
9	The Guernsey Literary and Potato Peel Pie Society	UK/USA [#]	5.9	StudioCanal
10	Finding Your Feet	UK	5.9	eOne Films
11	The Commuter	UK/USA [#]	4.0	StudioCanal
12	The Festival	UK	3.4	Entertainment
13	Nativity Rocks!*	UK	3.1	eOne Films
14	The Children Act*	UK/USA [#]	2.9	eOne Films
15	Phantom Thread	UK/USA [#]	2.8	Univeral
16	Robin Hood*	UK/USA [#]	2.8	Lionsgate
17	The Wife*	UK/Swe/USA [#]	1.7	Picturehouse Entertainment
18	Ghost Stories	UK	1.6	Lionsgate
19	Peterloo*	UK	1.2	eOne Films
20	Patrick	UK	1.2	Disney

Source: comScore, BFI RSU analysis

Notes:

Box office gross = cumulative gross up to 27 January 2018.

* Film still being exhibited on 27 January 2018.

[#] Film made with independent (non-studio) US support or with the independent arm of a US studio.

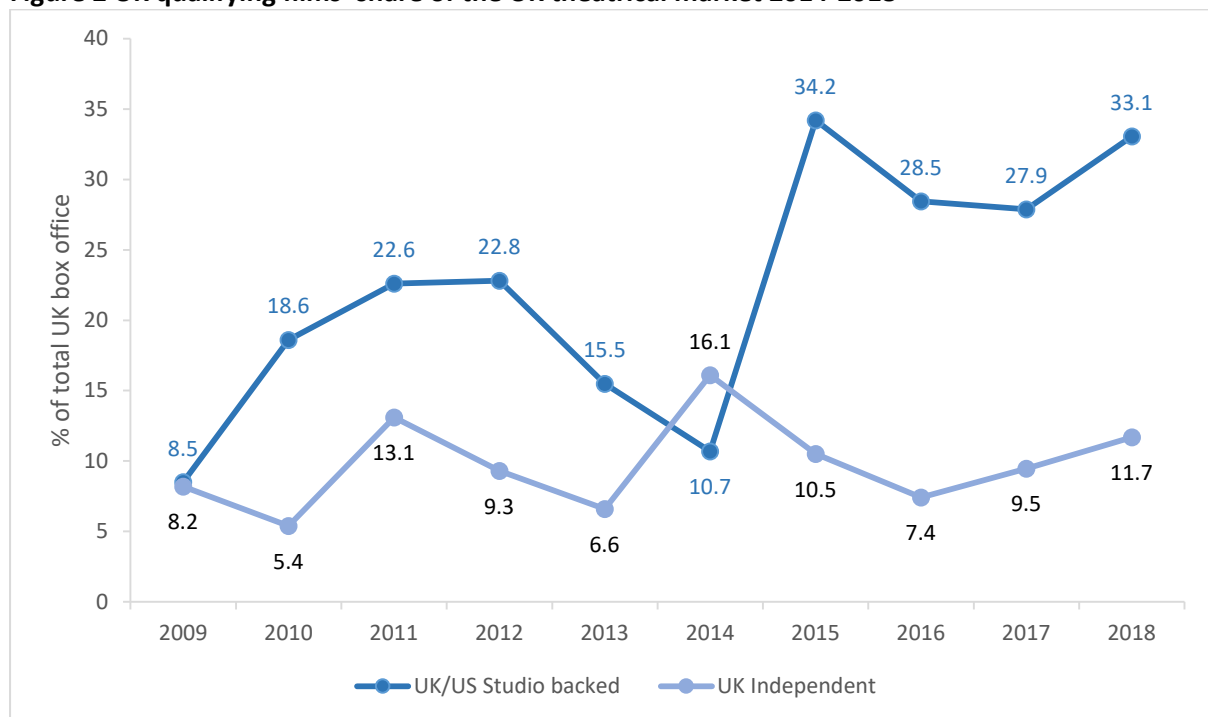
Data is for UK and the Republic of Ireland. UK and Republic of Ireland are a single "territory" for film distribution purposes.

6. Market share of UK films

The market share of independent UK films in 2018 was 11.7%, up from 9.5% in 2017 (Figure 2). The market share of US studio-backed, UK-made, qualifying titles was 33.1%, an increase from 27.9% in 2017. The market share of all UK films, at 44.8% (being slightly greater than the high in 2015) was the highest market share since records began in 2001.

Figure 2 shows the fluctuating patterns of UK market share with the annual figure dependent on a small number of high-grossing titles. The large increase in market share for US studio-backed, UK-made, qualifying titles in 2015 was due to the success of *Star Wars: The Force Awakens* and *SPECTRE*. In 2014, owing to the performance of *Paddington* and *The Inbetweeners 2* and the low number of US studio-backed, UK-made, qualifying titles released, the independent UK film market share was a record high. The average independent UK market share for the 10 year period from 2009-2018 was 9.8%.

Figure 2 UK qualifying films' share of the UK theatrical market 2014-2018



Source: BFI

2018 market share calculation based on grosses up to and including 27 January 2018; market share for previous years based on grosses up to and including the third weekend in February of that given year.

Notes

1. Data

Admissions data supplied by the Cinema Advertising Association/comScore. Box office data supplied by comScore.

The value of the UK box office in 2018 (£1,282.1 million) refers to the gross value of UK ticket sales in the calendar year. Subsequent analysis of individual titles and market shares includes box office gross in the UK and Republic of Ireland up to and including 27 January 2018 for films released in the calendar year.

2. Definitions

Country of origin is allocated by the BFI Research and Statistics Unit. For the purposes of this analysis, a **UK film** is one which is certified as such by the UK Secretary of State for Digital, Culture, Media and Sport under Schedule 1 of the Films Act 1985, via the Cultural Test, under one of the UK's official co-production agreements or the European Convention on Cinematographic Coproduction; a film which has not applied for certification but which is obviously British on the basis of its content, producers, finance and talent; or (in the case of a re-release) a film which met the official definition of a British film prevailing at the time it was made or was generally considered to be British at that time. Most UK films in the analysis (including the major UK/USA films) fall into the first group – films officially certified as British.

An **independent film** is produced without creative or financial input from the major US studio companies. These are Fox Entertainment Group, NBC Universal, Paramount Motion Pictures Group, Sony Pictures Entertainment, Walt Disney Motion Pictures Group and Warner Bros Entertainment.

3. Feedback

We welcome feedback from users of our statistics releases to help us improve what we do. If you have any feedback on these statistics, or if you wish to make a complaint, in the first instance please contact us using the named contact details shown below.

4. Statistical contact details

This release was prepared by Alex Tosta and Ian Cade, Research and Statistics Unit, BFI,
tel + 44 (0)20 7173
3279

(end)