The UK box office in 2009

UK Film Council Research and Statistics Unit

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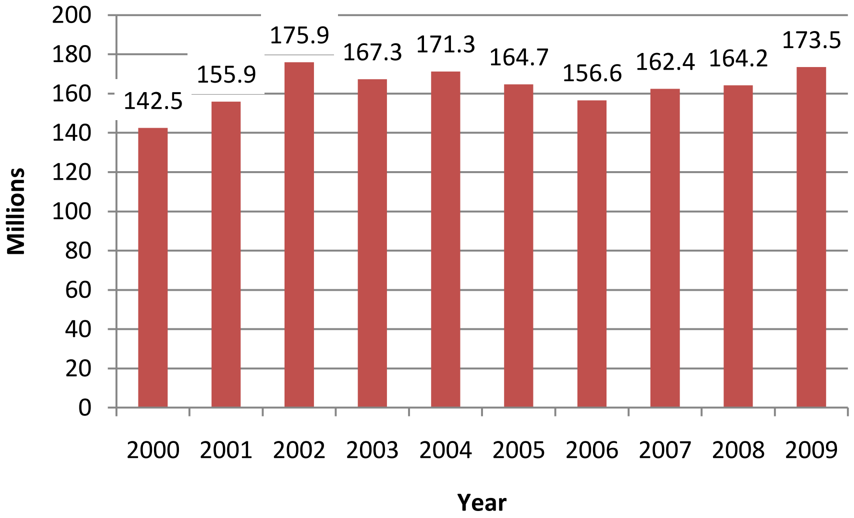
UK cinema admissions for 2009 were 173.5 million, the highest since 2002 and the second highest since 1971. The total UK gross box office for the year was a record £944 million, up 11% on 2008 and the overall territory gross (including the Republic of Ireland) exceeded £1 billion for the first time (£1.05 billion).

Figure 1: Annual UK admissions, 2000-2009



Source: CAA; Nielsen EDI

The year began strongly with January admissions up 8% on the previous year, due mainly to the release of UK film *Slumdog Millionaire*. The first major 3D animated release of the year, *Bolt*, and the continued strong performance of *Slumdog Millionaire* following BAFTA and Academy Award® success helped to lift February ticket sales by 16%. The April release of another 3D animated title, *Monsters vs. Aliens* and action thriller *Fast & Furious* increased ticket sales by 41% compared with April 2008 and a raft of major studio releases such as *X-Men Origins: Wolverine*, *Star Trek*, *Angels and Demons* and *Night at the Museum 2* continued to lift admissions in May. Surprise hit comedy *The Hangover* and franchise films *Terminator Salvation* and *Transformers: Revenge of the Fallen* contributed to the 6% increase in June admissions. Admissions across the summer months failed to match the levels of 2008, when *Mamma Mia!* and *The Dark Knight* earned over £110 million between them but the sixth instalment of the *Harry Potter* series, *Harry Potter and the Half-Blood Prince*, was released in July and went on to gross almost £51 million. *Ice Age III* was also released in July and grossed over £35 million, with over half of that from 3D screens. The release of another 3D animation, *Up*, and the second film in the Twilight series, *Twilight Saga: New Moon* boosted autumn admissions and the year ended with the highest December admissions for four years as *Avatar* became the widest released and most successful 3D film to date.

Table 1: Monthly UK cinema admissions, 2008-2009

Month	2008 (million)	2009 (million)	% change on 2008
January	13.5	14.5	+7.7
February	12.9	15.0	+16.4
March	12.2	11.9	-2.3
April	9.8	13.8	+40.8
May	12.7	15.8	+24.0
June	11.8	12.5	+5.6
July	21.4	20.0	-6.4
August	20.4	15.5	-23.8
September	10.7	9.7	-9.0
October	13.0	13.5	+3.8
November	13.5	14.9	+10.4
December	12.3	16.3	+32.5
Total	**164.2**	**173.5**	**+5.6**

Source: CAA, Nielsen EDI

Table 2: Average weekly UK cinema admissions, 2008-2009

Month	2008 weekly average (million)	2009 weekly average (million)
January	3.0	3.3
February	3.1	3.7
March	2.8	2.7
April	2.3	3.2
May	2.9	3.6
June	2.8	2.9
July	4.8	4.5
August	4.6	3.5
September	2.5	2.3
October	2.9	3.1
November	3.2	3.5
December	2.8	3.7

Source: CAA, Nielsen EDI

Patterns of regional cinemagoing were similar to previous years with the London area accounting for just under a quarter of cinema admissions (24%), followed by the Midlands (14%) and Lancashire (11%).

Table 3: Cinema admissions by ISBA region, 2009

Region	Admissions (million)	Admissions (%)
London	41.7	24.0
Midlands	24.6	14.2
Lancashire	19.8	11.4
Southern	16.0	9.2
Yorkshire	14.6	8.4
Central Scotland	12.8	7.4
Wales and West	11.4	6.6
East of England	11.3	6.5
North East	6.5	3.7
Northern Ireland	5.7	3.3
South West	4.3	2.5
Northern Scotland	3.6	2.1
Border	1.3	0.8
Total	173.5	100.0

Source: CAA, Nielsen EDI

Harry Potter and the Half-Blood Prince was the highest earning release of the year with £51 million (Table 4), although at the time of writing *Avatar* is continuing to perform strongly in its fourth weekend on release and could go on to exceed this figure.

Table 4: Top 20 films released in the UK and Republic of Ireland, 2009

	Title	Country of origin	Box office gross (£m)	Distributor
1	Harry Potter and the Half-Blood Prince	UK/USA	50.72	Warner Bros
2	Avatar*	USA	41.00	20th Century Fox
3	Ice Age III	USA	35.02	20th Century Fox
4	Up*	USA	34.42	Disney
5	Slumdog Millionaire	UK	31.66	Pathé
6	The Twilight Saga: New Moon*	USA	27.08	E1 Films
7	Transformers: Revenge of the Fallen	USA	27.06	Paramount
8	The Hangover	USA	22.12	Warner Bros
9	Star Trek	USA	21.40	Paramount
10	Monsters Vs. Aliens	USA	21.37	Paramount
11	A Christmas Carol*	USA	20.16	Disney
12	Night at the Museum 2	USA	20.03	20th Century Fox
13	2012*	USA	19.43	Sony Pictures
14	Angels and Demons	USA	18.79	Sony Pictures
15	Bolt	USA	17.94	Disney
16	X-Men Origins: Wolverine	USA	16.28	20th Century Fox
17	Sherlock Holmes	UK/USA	15.68	Warner Bros
18	Bruno	USA	15.66	Universal
19	Marley & Me	USA	15.25	20th Century Fox
20	Alvin and the Chipmunks II: The Squeakquel	USA	15.00	20th Century Fox

Source: Nielsen EDI, UK Film Council
Box office gross = cumulative gross up to 10 January 2010.
Films with an asterisk (*) were still being exhibited on 10 January 2010.
UK and Republic of Ireland are a single "territory" for film distribution purposes.

The development of digital 3D exhibition had a major impact on the box office in 2009 and the top 10 3D releases of the year are listed in Table 5. *My Bloody Valentine* was released in 118 3D-enabled cinemas in January and grossed £6.2 million. This was followed by *Bolt* in 124 3D sites in February and by the time *Monsters vs. Aliens* was released in April there were 169 cinemas showing that particular film in 3D. The next leap in the evolution of 3D in UK cinemas came about in July when *Ice Age III* was released in 240 3D-enabled cinemas with additional sites added for the release of *Up* (266 3D sites) and *A Christmas Carol* (281 sites). The culmination of a year of 3D growth occurred in December with the release of James Cameron's *Avatar* across 302 3D sites. It has grossed over £32 million to date from these cinemas, representing 79% of its overall gross.

Table 5: Top 10 3D releases, 2009

	Title	3D gross (£m)	Total gross (£m)	3D as % of gross	Number of 3D sites	Distributor
1	Avatar	32.3	41.0	79	302	20th Century Fox
2	Up	20.8	34.4	60	266	Disney
3	Ice Age III	18.2	35.0	52	240	20th Century Fox
4	A Christmas Carol	14.3	20.2	71	281	Disney
5	The Final Destination	10.7	12.8	84	228	Entertainment
6	Monsters Vs. Aliens	9.4	21.4	44	169	Paramount
7	G-Force	9.4	13.5	69	228	Disney
8	Bolt	7.2	17.9	40	124	Disney
9	My Bloody Valentine	6.2	6.9	89	118	Lions Gate
10	Coraline	5.5	7.4	74	174	Universal

Source: Nielsen EDI
Note: the 3D figures do not include IMAX screenings, although IMAX revenues contribute to the total gross.

The highest-grossing UK release of the year was *Harry Potter and the Half-Blood Prince* which grossed £51m, followed by eight-times Oscar® winning *Slumdog Millionaire* with £32 million (Table 6).

Table 6: Top 20 UK films released in the UK and Republic of Ireland, 2009

	Title	Country Of origin	Box office Gross (£m)	Distributor
1	Harry Potter and the Half-Blood Prince	UK/USA	50.72	Warner Bros
2	Slumdog Millionaire	UK	31.66	Pathé
3	Sherlock Holmes*	UK/USA	15.68	Warner Bros
4	Fantastic Mr Fox*	UK/USA	8.92	20th Century Fox
5	St. Trinian's 2: The Legend of Fritton's Gold*	UK	6.18	Entertainment
6	The Boat that Rocked	UK/USA	6.14	Universal
7	Nativity!*	UK	5.17	E1 Films
8	The Young Victoria	UK/USA	5.11	Momentum
9	Harry Brown*	UK	4.54	Lions Gate
10	Planet 51*	UK/Spa	4.43	Entertainment
11	The Imaginarium of Doctor Parnassus	UK/Can	3.92	Lions Gate
12	Dorian Gray	UK	2.97	Momentum
13	Nine*	UK/USA/Ita	2.40	Entertainment
14	The Damned United	UK/USA	2.24	Sony Pictures
15	In the Loop	UK	2.16	Optimum
16	Last Chance Harvey	UK/USA	2.14	Momentum
17	An Education*	UK	1.98	E1 Films
18	Lesbian Vampire Killers	UK	1.67	Momentum
19	Moon	UK	1.32	Sony Pictures
20	Looking for Eric	UK/Fra/Bel/Ita	1.31	Icon

Source: Nielsen EDI, UK Film Council RSU analysis
Box office gross = cumulative gross up to 10 January 2010.
Films with an asterisk (*) were still being exhibited on 10 January 2010.
UK and Republic of Ireland are a single "territory" for film distribution purposes.

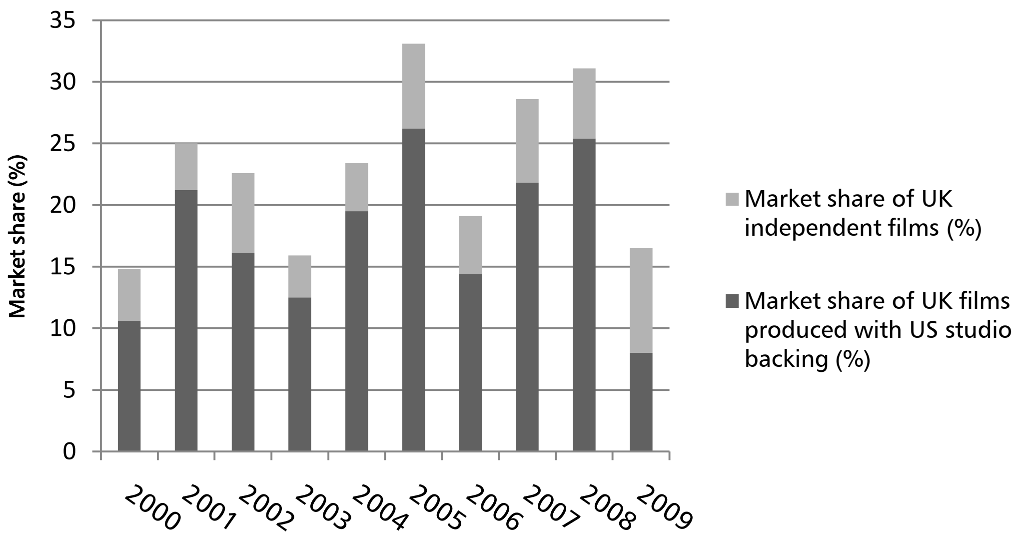
The theatrical market share of UK films (Table 7) was 16.5% which included 8% from films wholly or part-financed by US studios but featuring UK cast, crew, locations, facilities, post-production and often UK source material. Independent UK films took an 8.5% share of the UK box office, the highest figure of the last decade. The fluctuating pattern of UK market share is underlined in Figure 2 with the annual figure dependent on a small number of high-grossing titles. The average UK market share for the decade was 23%, with US studio-backed films accounting for 18% and independent UK films 5%. The market share of UK independent films averaged 4.4% in the first half of the decade and 6.5% in the second half of the decade. The total UK market share averaged 20% in the first half of the decade and 26% in the second half of the decade.

Table 7: Theatrical market share of UK films by studio and independent titles, 2000-2009

Year	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Market share of UK films produced with US studio backing (%)	10.6	21.2	16.1	12.5	19.5	26.2	14.4	21.8	25.4	8.0
Market share of UK independent films (%)	4.2	3.8	6.5	3.4	3.9	6.9	4.7	6.8	5.7	8.5
Total UK film market share (%)	14.8	25.0	22.6	15.9	23.4	33.1	19.1	28.6	31.1	16.5

Source: UK Film Council
2009 market share calculation based on grosses up to and including 10 January 2010

Figure 2: UK film share of the UK theatrical market 2000-2009



Source: UK Film Council

Notes

1. Admissions data supplied by the Cinema Advertising Association and Nielsen EDI.
2. Gross box office data supplied by Nielsen EDI.
3. Country of origin is allocated by the UK Film Council 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 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.

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