

INDIA IS BACK... AT THE THEATRES

A GroupM & Ormax Media Report: 2022

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Executive Summary

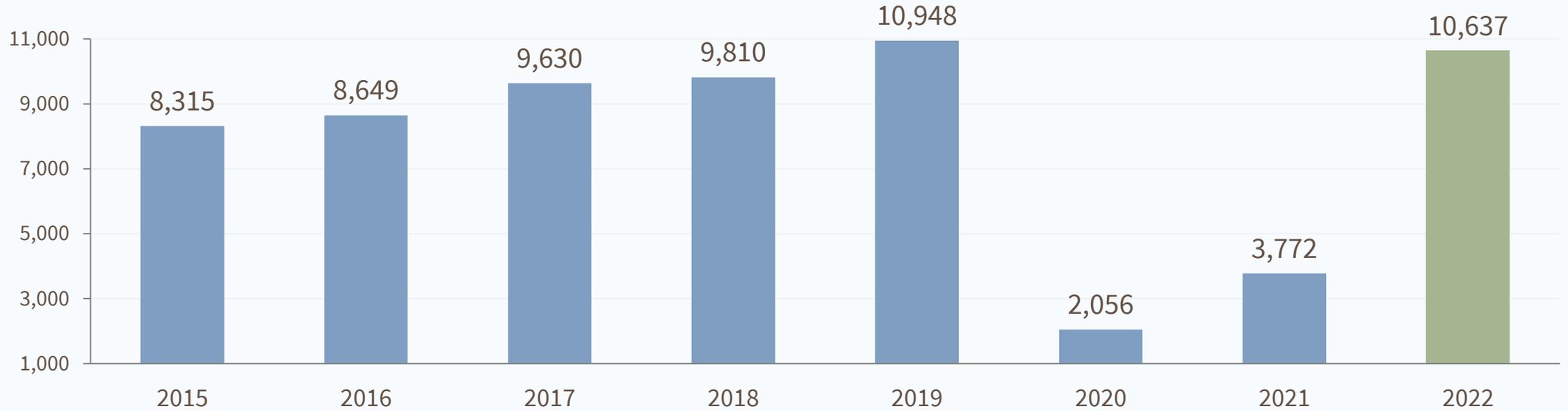
- With gross box office of ₹10,637 Cr, 2022 became **only the second year ever** to cross ₹10,000 Cr mark at the India box office. Despite theatres being shut in many parts of India in January 2022, the year is only about ₹300 Cr behind 2019, which remains the best-grossing year at the India box office
- Compared to pre-pandemic (2019), Hindi box office lost share (44% to 33%) to South Indian languages, with Telugu being the biggest gainer, moving up from 13% to 20% share. 32% of Hindi box office came from dubbed versions of South films like K.G.F: Chapter 2, RRR, Kantara, etc.
- K.G.F: Chapter 2, RRR and Avatar emerged as the top 3 films of the year, based on their cumulative gross collections across languages. Brahmāstra was the top (original) Hindi language film
- Telugu & Tamil films crossed cumulative footfalls of 20 Cr, ahead of Hindi, which relied on higher ticket rates compared to other languages
- The second half of the year saw an 18% increase in the number of brands advertising in Indian cinemas, compared to the same period in 2019. F&B and Consumer Durables were the top 2 categories in cinema advertising in 2022

BOX OFFICE COLLECTIONS



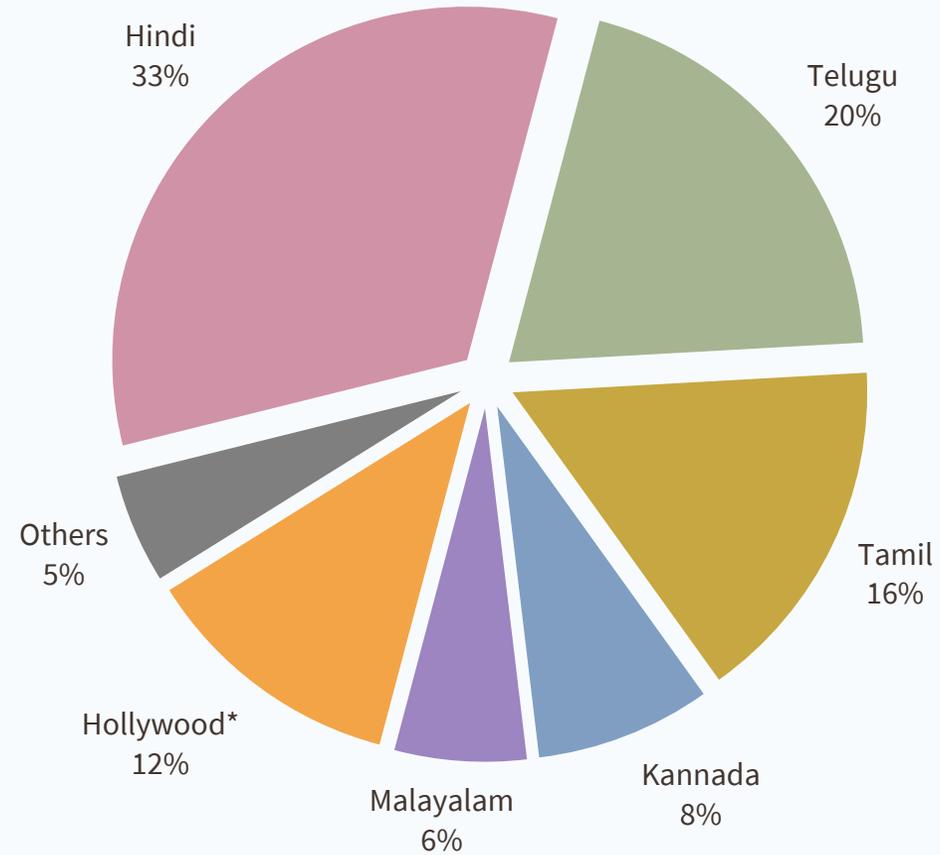
India Box Office

Gross Box Office (₹ Cr)



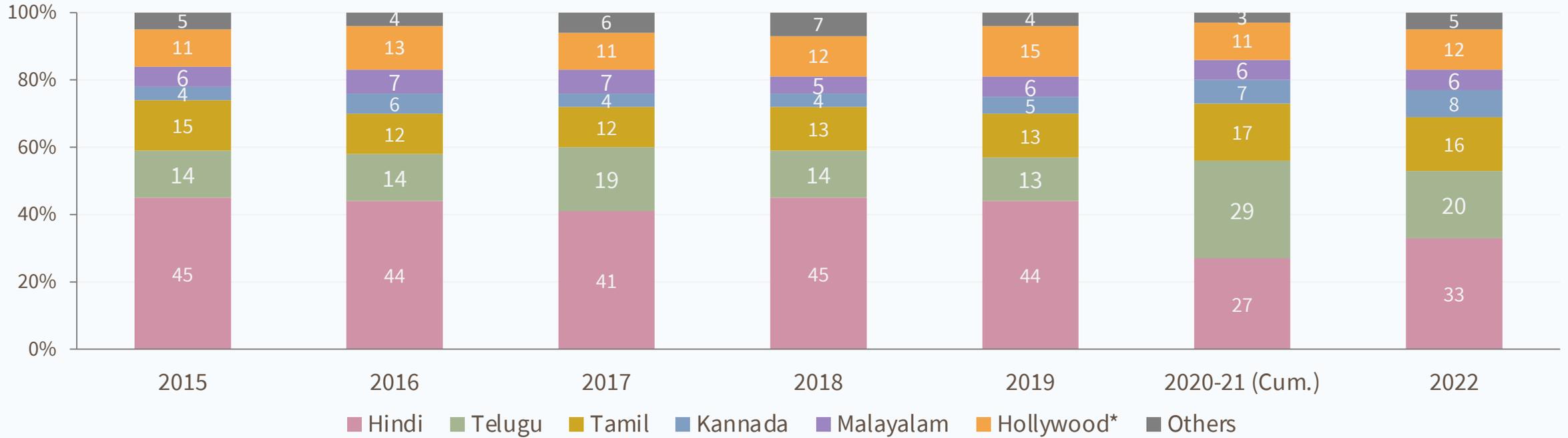
2022 is **only the second year ever** when the gross box office has crossed the ₹10,000 Cr mark. Despite theatres being shut in many parts of India in January 2022, the year is only about ₹300 Cr behind 2019, which remains the best-grossing year at the India box office.

Box Office Share by Language



**Hollywood includes all language versions*

Box Office Share by Language



**Hollywood includes all language versions*

Compared to the pre-pandemic year of 2019, Hindi cinema has lost 11 percentage points in share, while Telugu cinema has been the biggest gainer, growing its share from 13% to 20%.

Box Office by Language (2019 vs. 2022)

Language	Gross BO (2019)	Gross BO (2022)	Growth %	% Share (2019)	% Share (2022)
Hindi	4,831	3,513	-27	44	33
Telugu	1,404	2,145	53	13	20
Tamil	1,460	1,724	18	13	16
Hollywood*	1,595	1,230	-23	15	12
Kannada	522	810	55	5	8
Malayalam	604	633	5	5	6
Marathi	111	268	141	1	3
Punjabi	249	147	-41	2	1
Bengali	62	77	24	1	1
Gujarati	62	56	-10	1	1
Others	48	35	-27	0	0

All four South languages have surpassed their 2019 collections, with Telugu and Kannada showing the highest percentage growth.

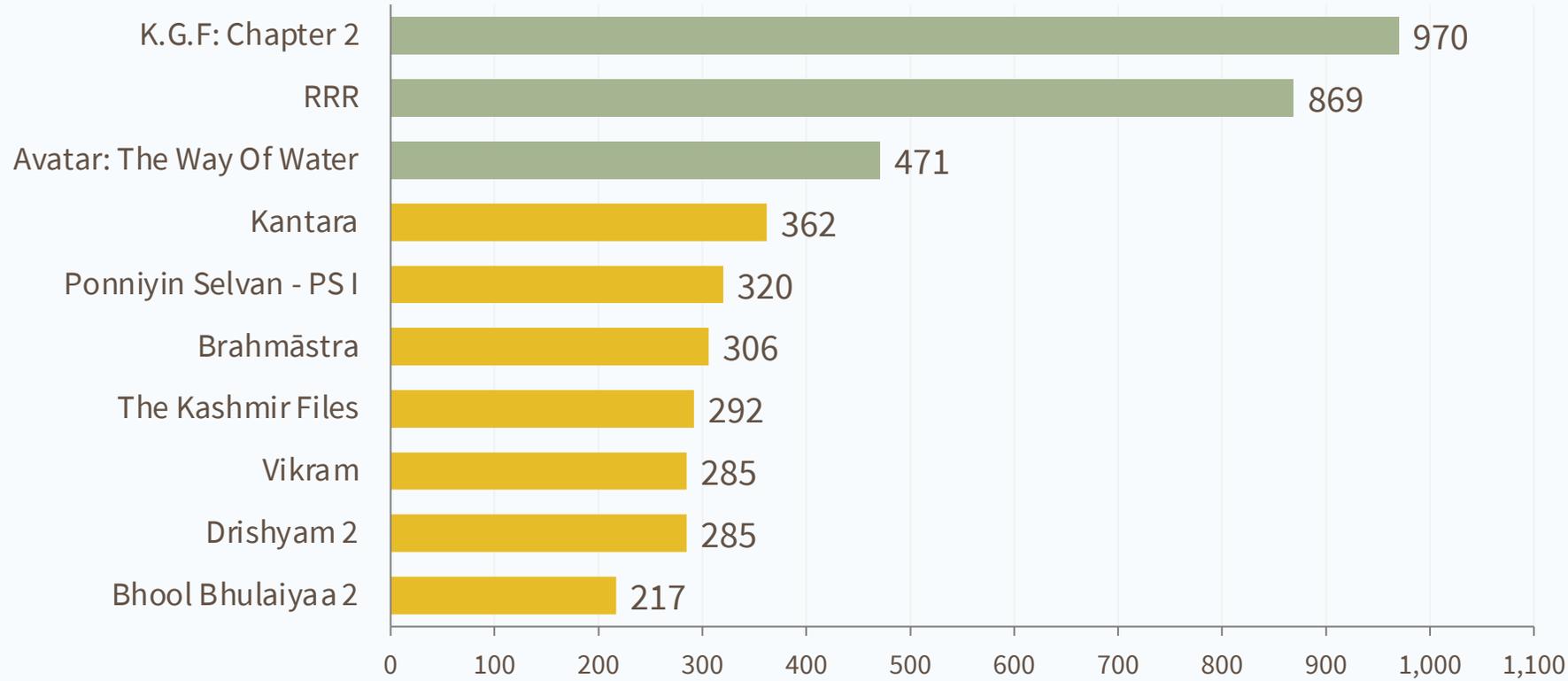
Hindi and Hollywood have underperformed compared to 2019, with the latter being impacted by a weaker flow of film in the first half of the year.

Gross BO figures in ₹ Cr

*Hollywood includes all language versions

Top 10 Films (All India)

Gross Box Office (₹ Cr)



Cumulative BO of each film in all languages in which it was released



FOOTFALLS & AVERAGE TICKET PRICE



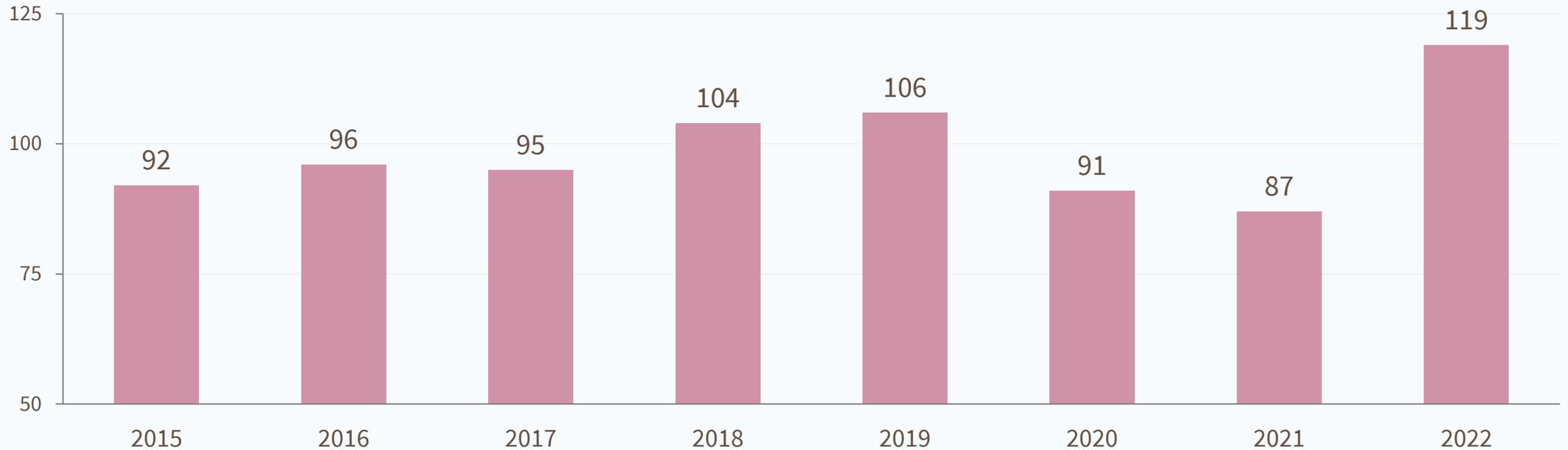
Domestic Footfalls

in Crore



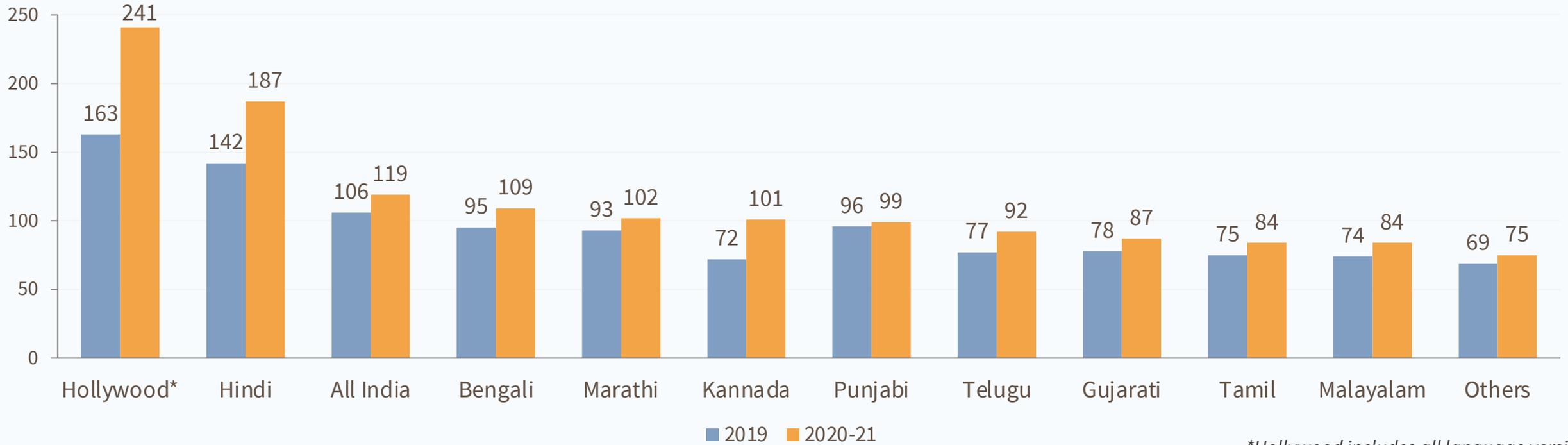
2022 recorded more than double the footfalls of 2021. However, footfalls were a notch below the pre-pandemic levels, largely because of Hindi cinema under-performing in 2022.

Average Ticket Price (₹)



Post-pandemic ATP is 12% higher than the pre-pandemic (2019) level. Higher share of box office from big-ticket/ event films across languages has also contributed to an increase in the ATP at an all India level.

ATP (₹) by Language



*Hollywood includes all language versions

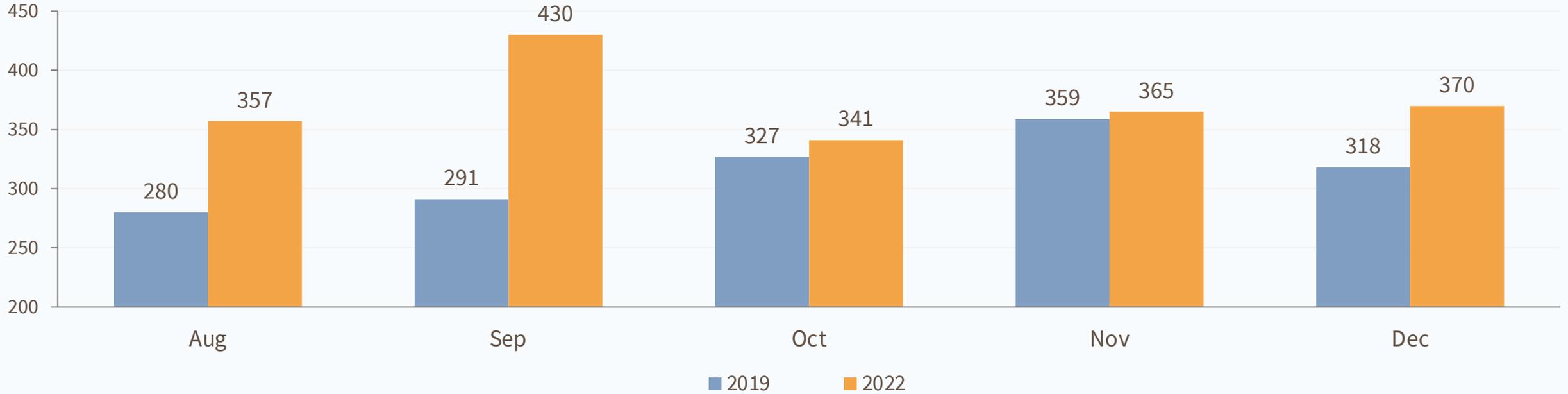
While all languages have seen an increase in ATP, Hollywood and Hindi, which are more multiplex-dependent, saw the maximum increase in 2022.

CINEMA ADVERTISING



Cinema Advertising: Pre & Post-Pandemic

Number of brands advertising in Indian cinemas



Number of brands advertising on Indian cinema in the second half of 2022 are higher than the same period in 2019, with an average increase of 18% in a typical month.

Top 5 Categories

2019

1. Clothing
2. Telecom/ Internet Service Provider
3. Consumer Durables
4. Food & Beverages
5. Banking, Financial Services & Insurance

2022

1. Food & Beverages
2. Consumer Durables
3. Clothing
4. Beauty & Personal Care
5. Banking, Financial Services & Insurance

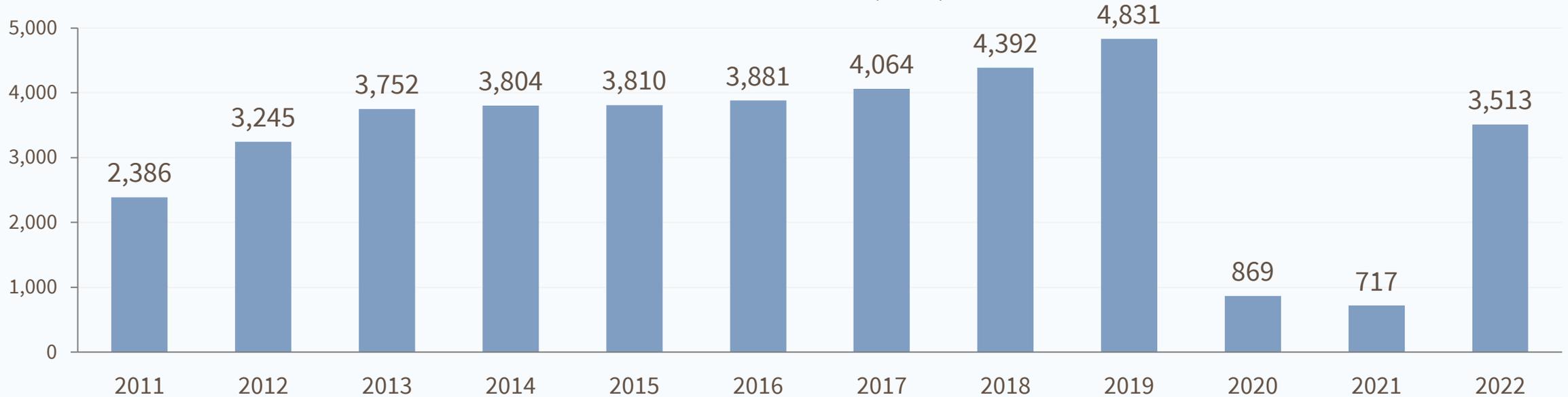
LANGUAGE-WISE PERFORMANCE

HINDI FILMS



Hindi: Domestic Box Office

Gross Box Office (₹ Cr)



At ₹3,500 Cr, Hindi cinema has under-performed in 2022, because of several high-profile titles failing to deliver at the box office.

Hindi: Domestic Footfalls

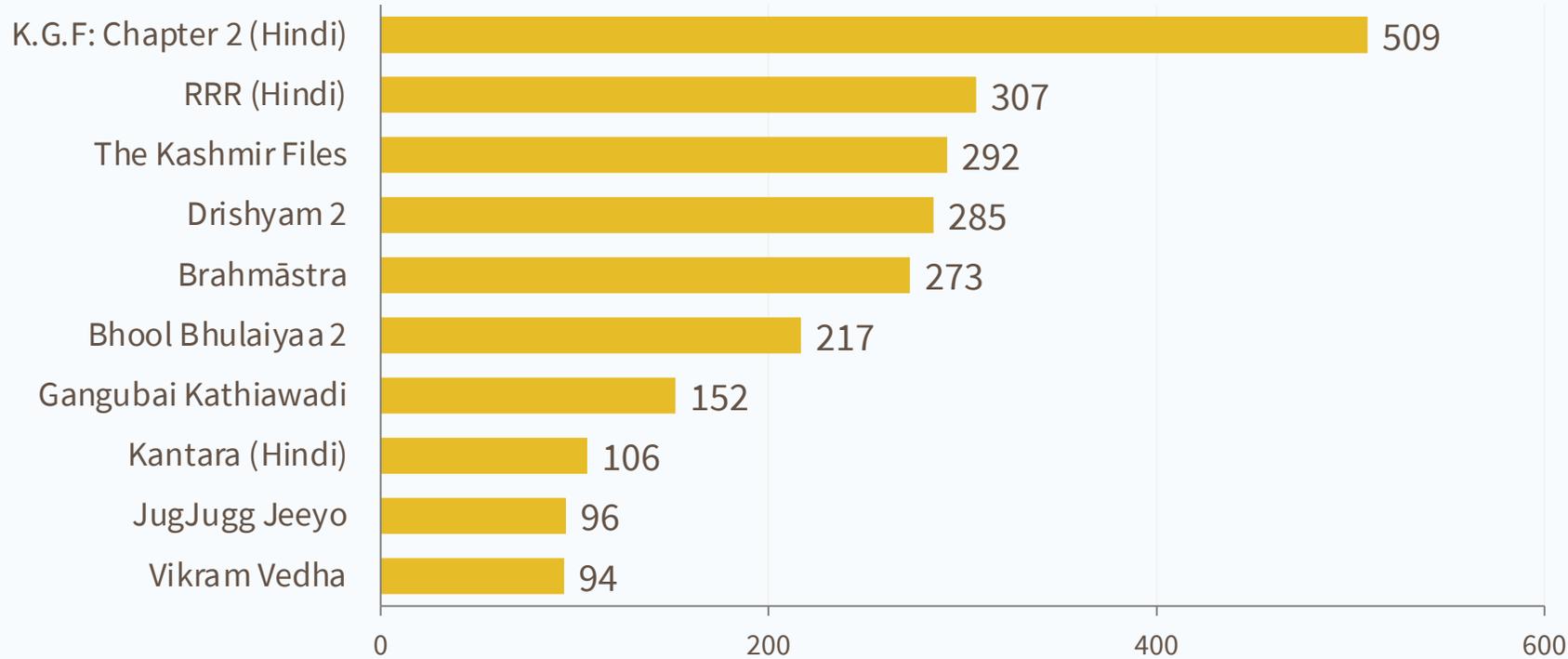
in Crore



Footfalls for Hindi cinema have not been able to recover to pre-pandemic levels, falling below the 20 Cr mark in 2022.

Hindi: Top 10 Films

Gross Box Office (₹ Cr)



The top 2 spots are taken by dubbed version of films from South India. Dubbed or multi-lingual (Hindi) versions of South films contributed a staggering ₹1138 Cr to the Hindi box office, i.e., 32% contribution. Without these films, Hindi cinema would have closed the year at an even-lower total.

*Lifetime gross has been estimated for films that are still running in theatres
For films released in multiple languages, only Hindi versions have been reported in this chart*

LANGUAGE-WISE PERFORMANCE TELUGU FILMS



Telugu: Domestic Box Office

Gross Box Office (₹ Cr)



2022 has been Telugu cinema's best-ever year till date, and also the first one to cross the ₹2,000 Cr mark.

Telugu: Domestic Footfalls

in Crore

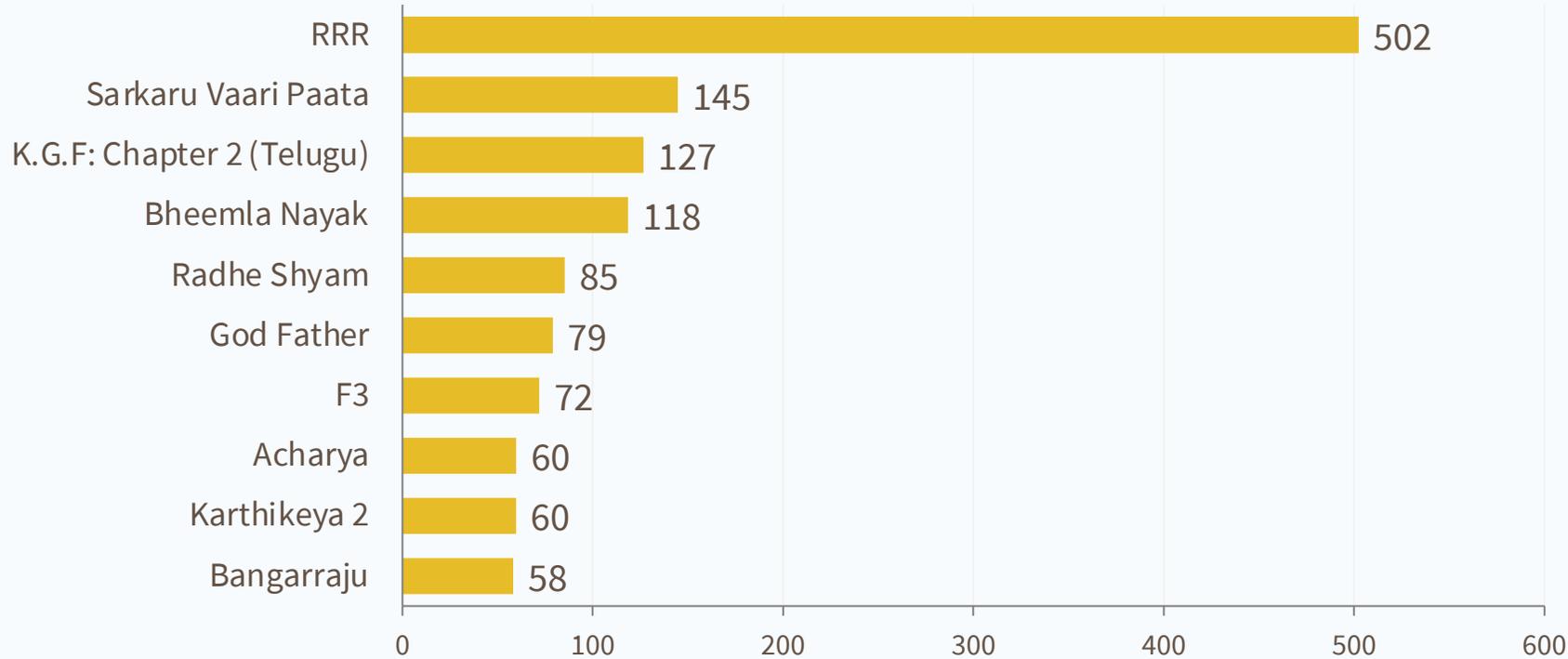


2022 is only the second year in the last decade when Telugu cinema footfalls have crossed the 20 Cr mark.

Telugu is now the no. 1 language at the India box office based on footfalls.

Telugu: Top 10 Films

Gross Box Office (₹ Cr)



RRR contributed 23% single-handedly to the Telugu box office of 2022. While no other film crossed the ₹150 Cr mark, a consistent flow of releases, that either opened very well or found audience appreciation, ensured steady performance through the year for the Telugu film industry.

*Lifetime gross has been estimated for films that are still running in theatres
For films released in multiple languages, only Telugu versions have been reported in this chart*

LANGUAGE-WISE PERFORMANCE

TAMIL FILMS



Tamil: Domestic Box Office

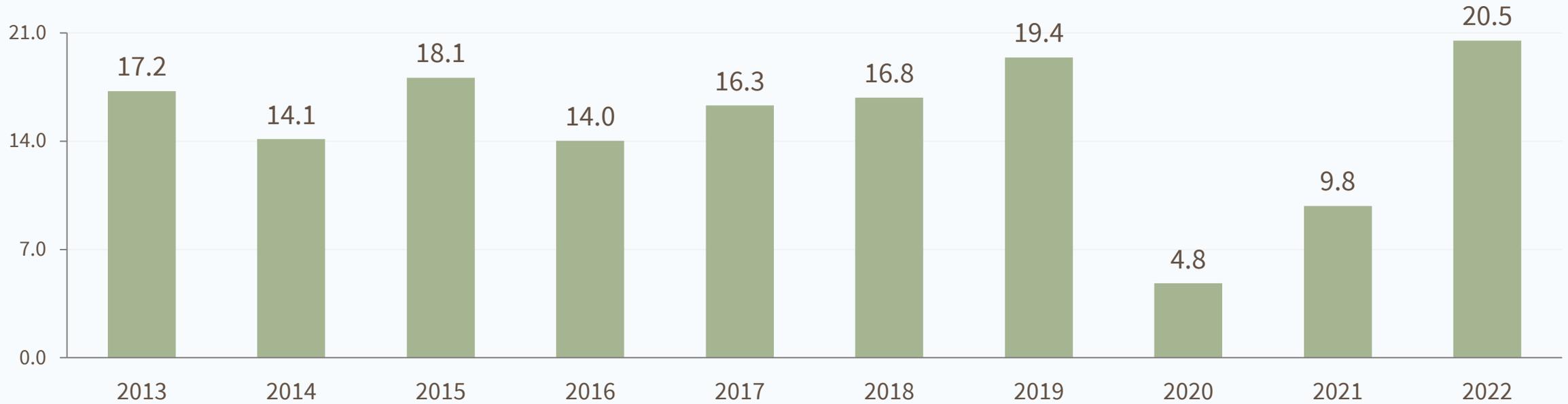
Gross Box Office (₹ Cr)



2022 was the highest-grossing year for Tamil cinema as well, becoming the first year ever when the industry crossed the ₹1,500 mark.

Tamil: Domestic Footfalls

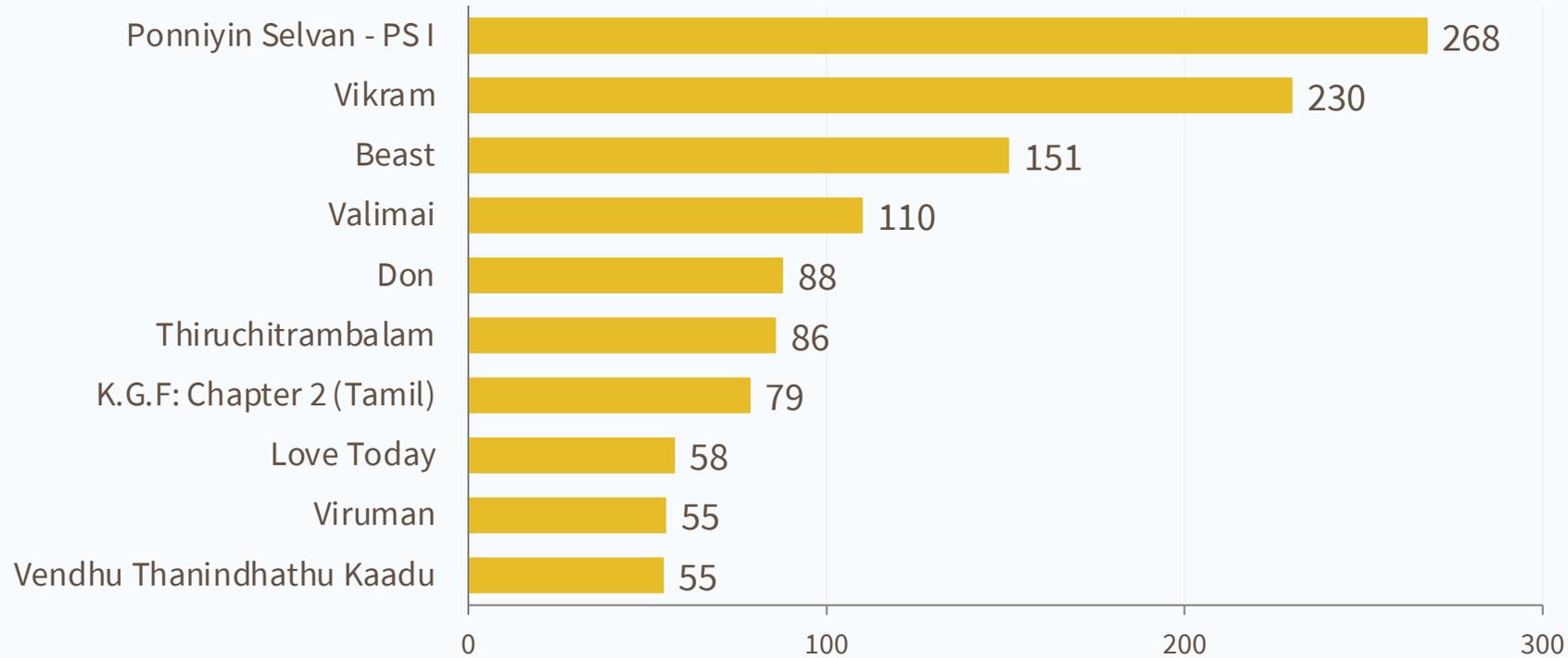
in Crore



Tamil cinema's 20.5 Cr footfalls are higher than Hindi cinema's 18.9 Cr, demoting Hindi to no. 3 in the footfalls ranking of languages.

Tamil: Top 10 Films

Gross Box Office (₹ Cr)



Two big successes in PS I and Vikram led the post-pandemic recovery for Tamil cinema, while a second line of successful medium-budget films ensured the year was not dependent only on the big blockbusters.

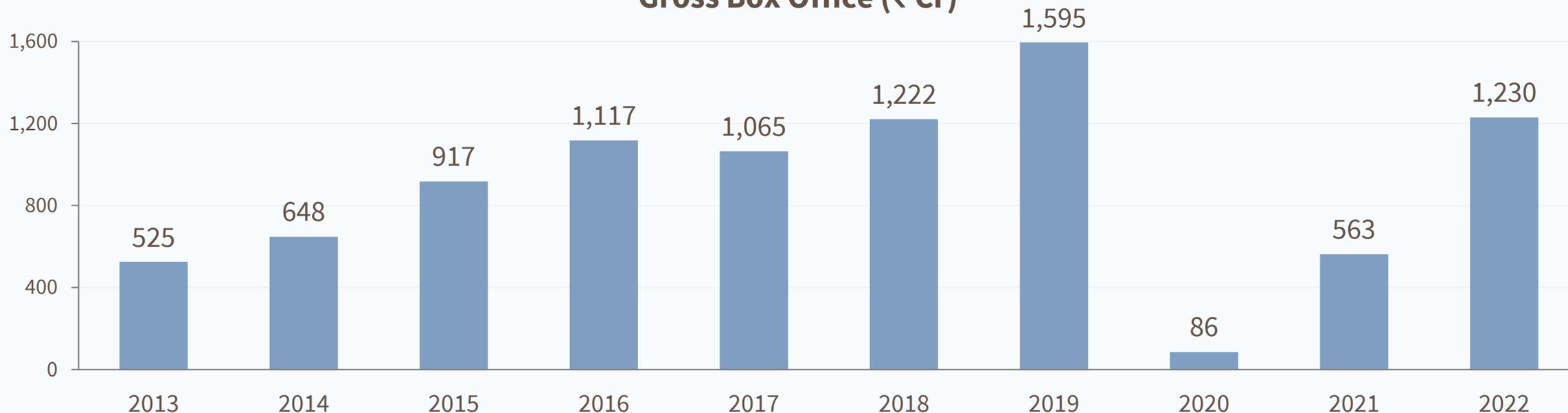
*Lifetime gross has been estimated for films that are still running in theatres
For films released in multiple languages, only Tamil versions have been reported in this chart*

LANGUAGE-WISE PERFORMANCE HOLLYWOOD FILMS



Hollywood: India Box Office

Gross Box Office (₹ Cr)



2022 saw strong recovery for Hollywood, with more than 100% growth over 2021. However, a disrupted release calendar, because of the global impact of the pandemic, meant lesser number of releases compared to pre-pandemic years, resulting in de-growth over 2019.

Hollywood: India Footfalls

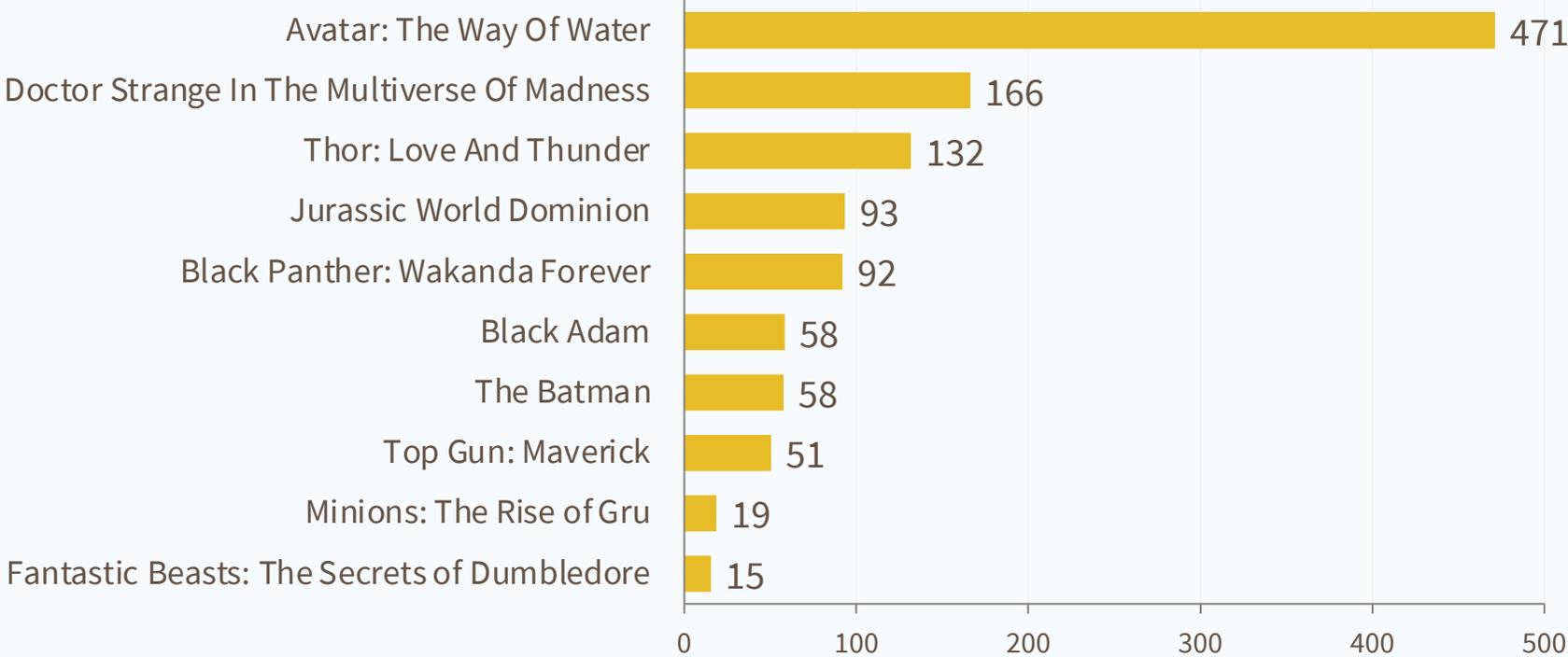
in Crore



With 3D films dominating the Hollywood box office in India in 2022, ATP levels increased, resulting in good box office, despite footfalls being well short of the 2019 level.

Hollywood: Top 10 Films

Gross Box Office (₹ Cr)



Avatar: The Way Of Water became the all-time highest-grossing Hollywood film in India, contributing a staggering 38% to Hollywood box office in India in 2022.

Only eight films crossed the ₹20 Cr mark, highlighting the absence of a long tail in Hollywood theatrical business in India.

Lifetime gross has been estimated for films that are still running in theatres
Figures include all language versions

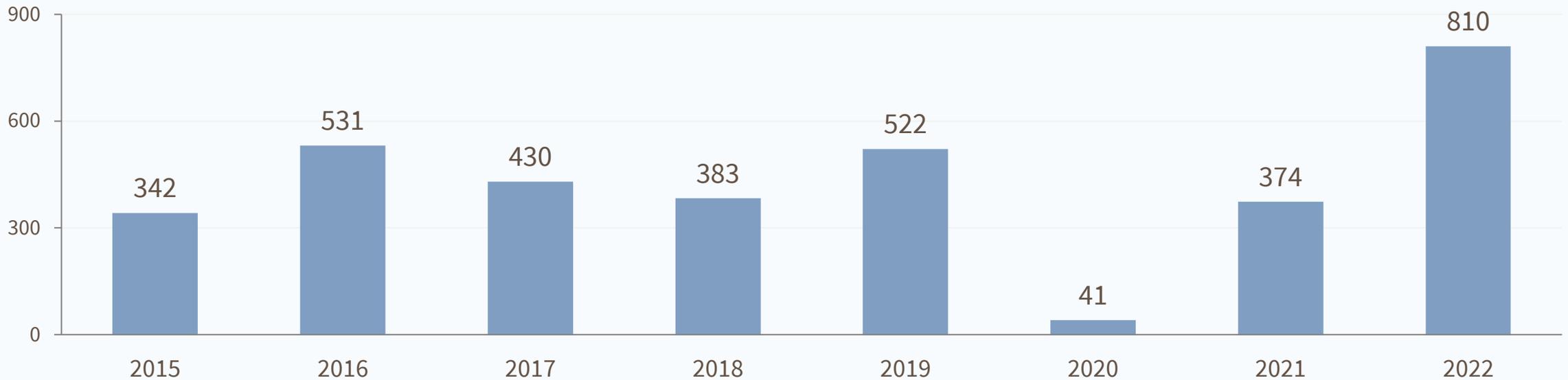


LANGUAGE-WISE PERFORMANCE KANNADA FILMS



Kannada: Domestic Box Office

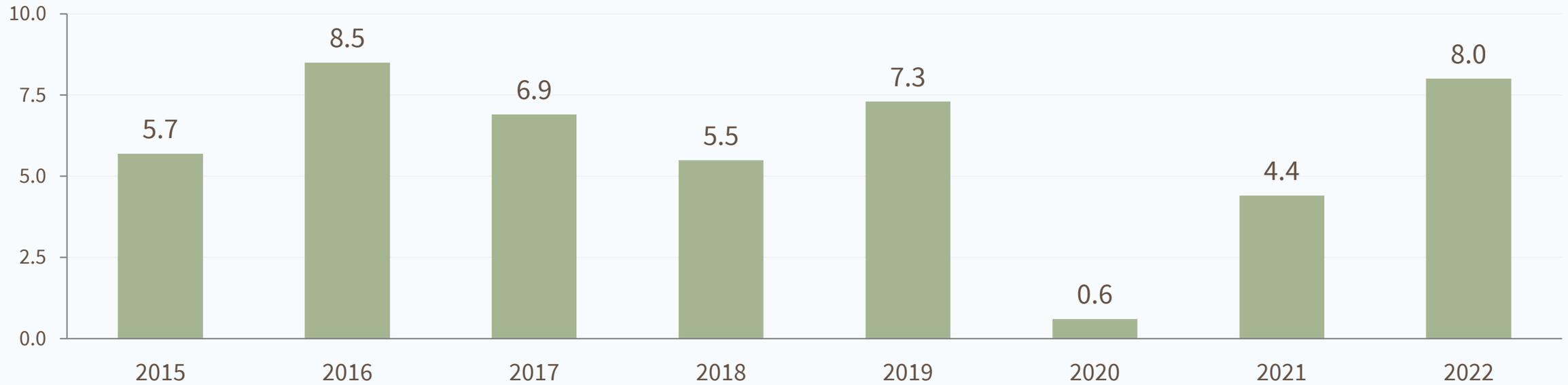
Gross Box Office (₹ Cr)



Kannada cinema had its best-ever year by a wide margin, beating the previous record (2016) by a staggering 53%.

Kannada: Domestic Footfalls

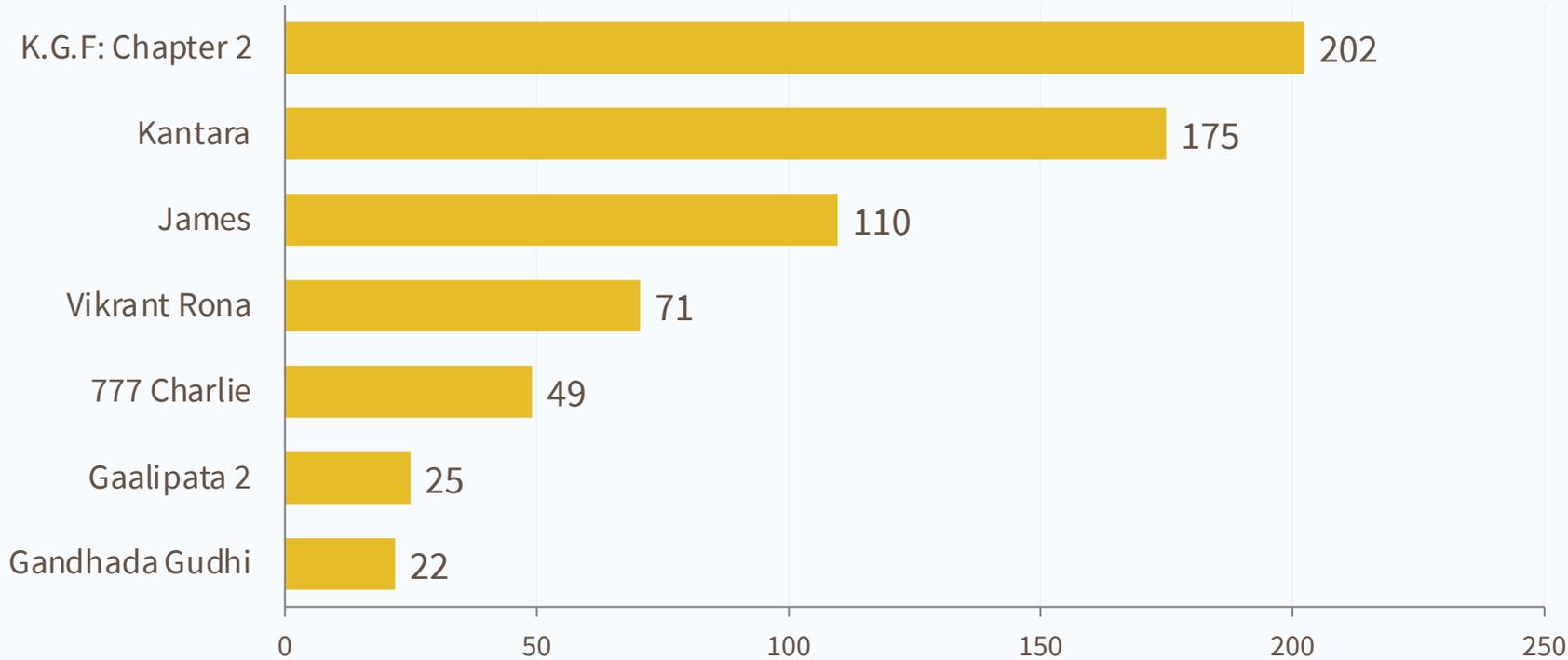
in Crore



Footfalls saw healthy growth too, being the highest since 2016, when they had last touched the 8 Cr level.

Kannada: Top 7 Films

Gross Box Office (₹ Cr)



K.G.F: Chapter 2 and Kantara led the glorious performance of Kannada cinema in 2022. Only seven films crossed the ₹20 Cr mark, highlighting the dependence of the Kannada film industry on big-ticket blockbusters.

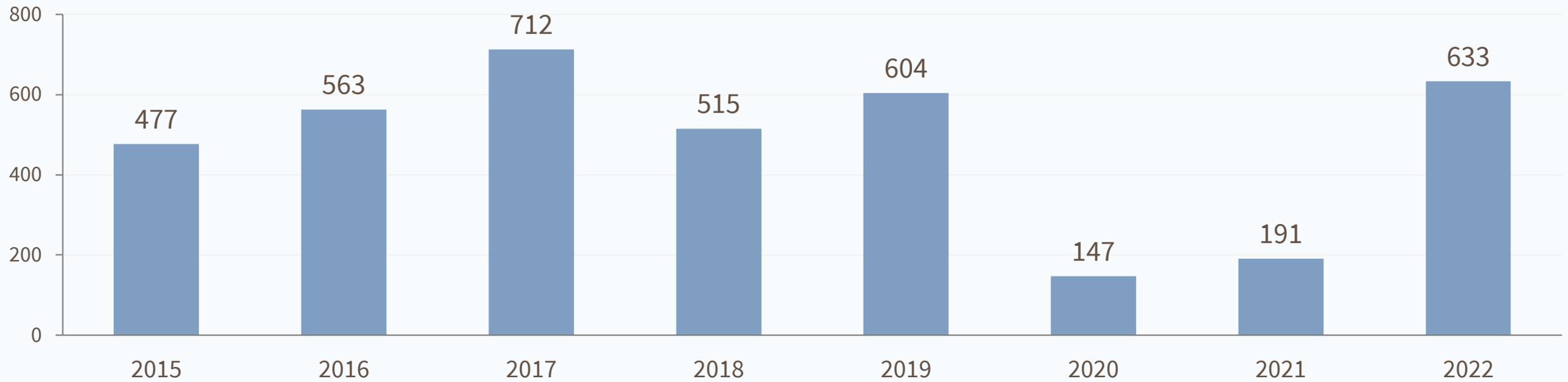
*Lifetime gross has been estimated for films that are still running in theatres
For films released in multiple languages, only Kannada versions have been reported in this chart*

LANGUAGE-WISE PERFORMANCE MALAYALAM FILMS



Malayalam: Domestic Box Office

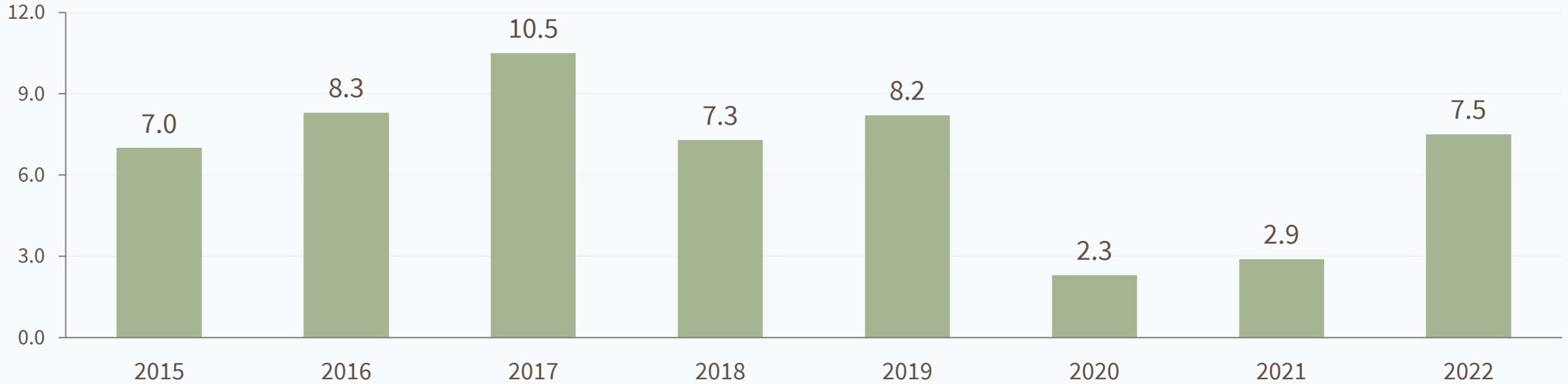
Gross Box Office (₹ Cr)



Malayalam cinema showed minimal growth over 2019, finishing at the same level as that year, just above ₹600 Cr.

Malayalam: Domestic Footfalls

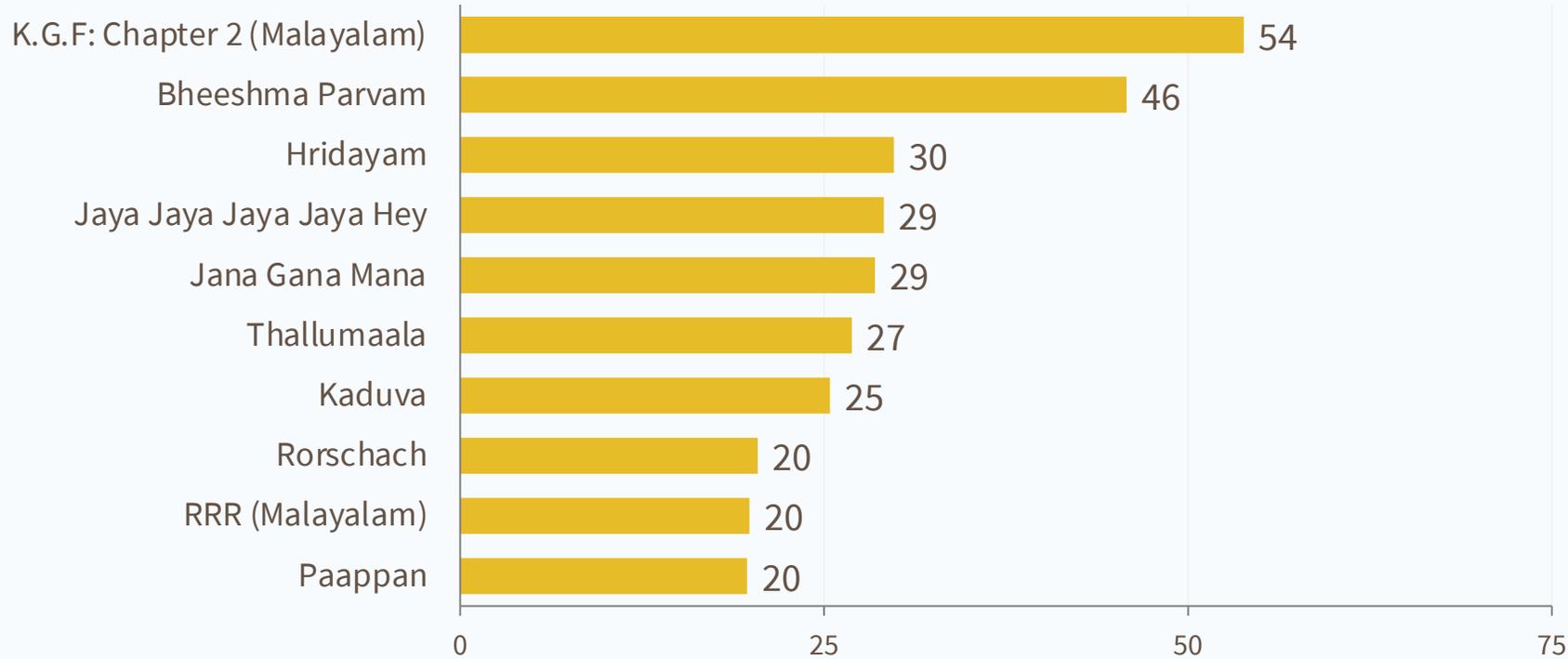
in Crore



Malayalam footfalls are back to the pre-pandemic levels, when they hovered in the 7-8 Cr range, with the exception of 2017.

Malayalam: Top 10 Films

Gross Box Office (₹ Cr)



Interestingly, the highest-grossing Malayalam film of the year was the dubbed of Kannada film K.G.F: Chapter 2. No (original language) Malayalam film crossed the ₹50 Cr mark. However, 18 films above ₹10 Cr and another 14 above ₹5 Cr, the industry saw a steady flow of small and medium scale films, ensuring good cumulative returns by the end of the year.

*Lifetime gross has been estimated for films that are still running in theatres
For films released in multiple languages, only Malayalam versions have been reported in this chart*

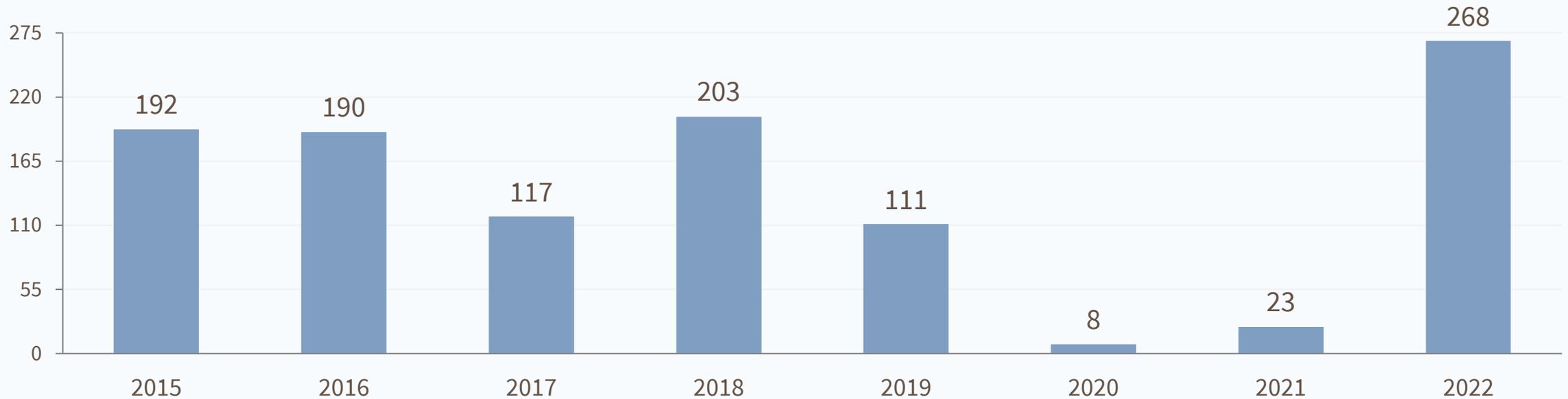
LANGUAGE-WISE PERFORMANCE

MARATHI FILMS



Marathi: Domestic Box Office

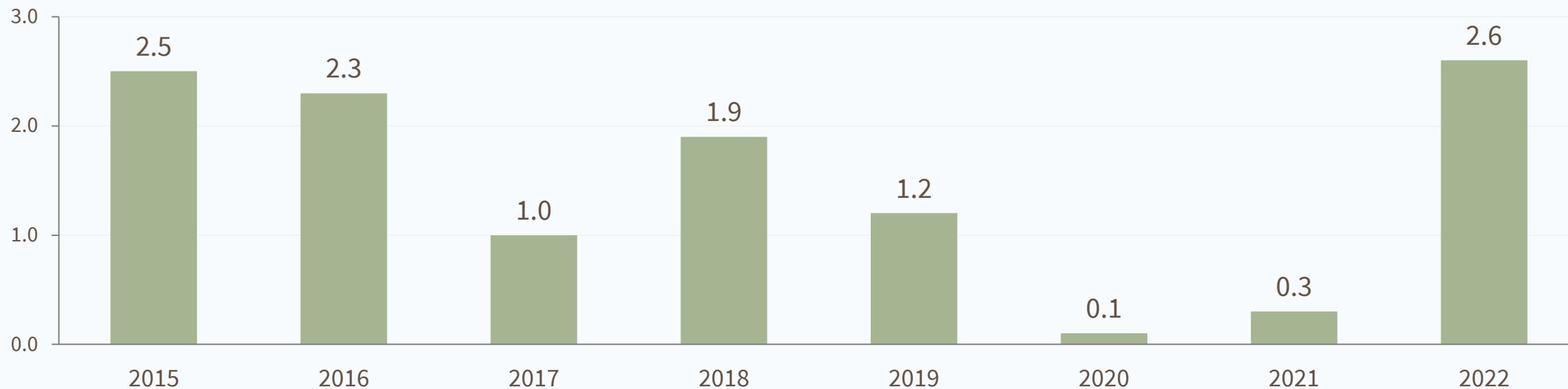
Gross Box Office (₹ Cr)



After struggling for several years, Marathi cinema had a very good year, crossing the ₹250 Cr for the first time ever.

Marathi: Domestic Footfalls

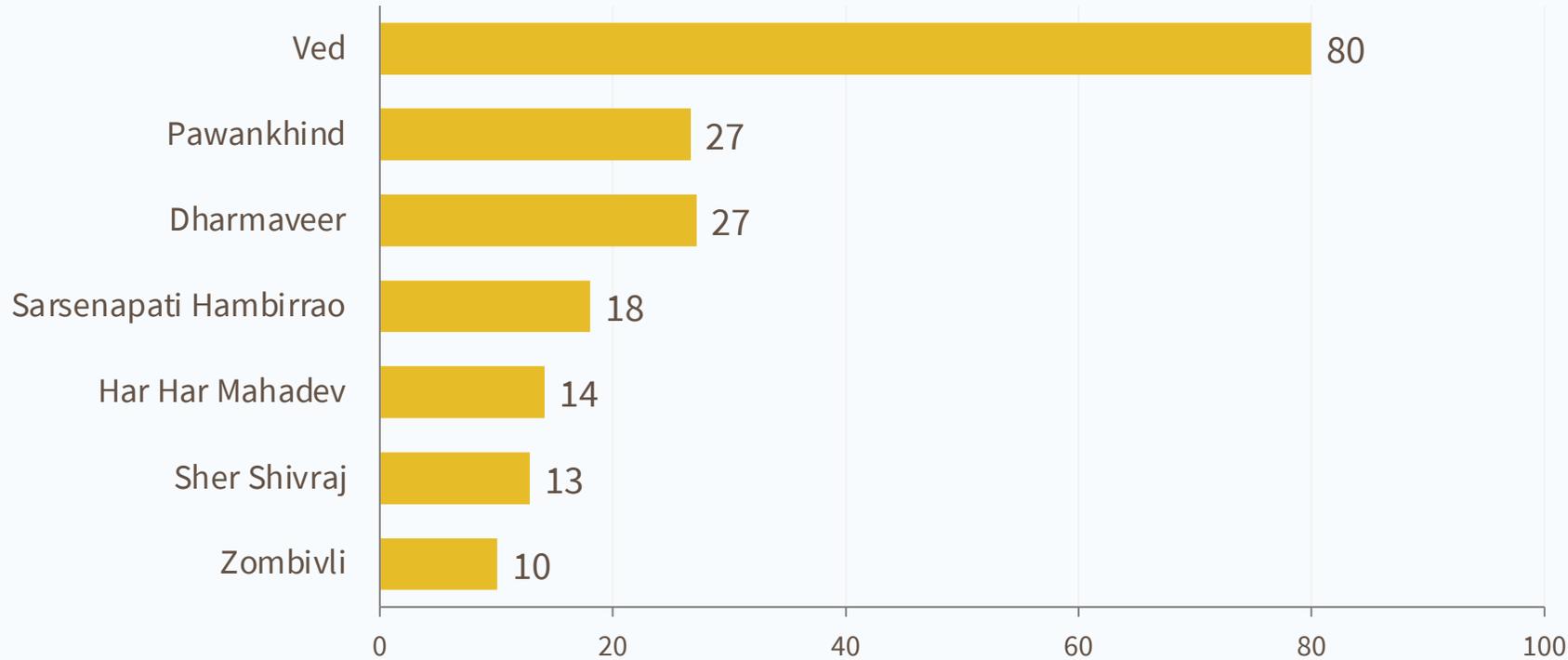
in Crore



2022 was also the best-ever year for Marathi cinema in the last decade, in terms of footfalls.

Marathi: Top 7 Films

Gross Box Office (₹ Cr)



Riteish Deshmukh's Ved is expected to gross ₹80 Cr at the domestic box office, making it the second-highest grossing Marathi film of all time after Sairat.

However, only seven films crossed the ₹10 Cr mark, highlighting the absence of consistency of performance in Marathi cinema, unlike the South languages.

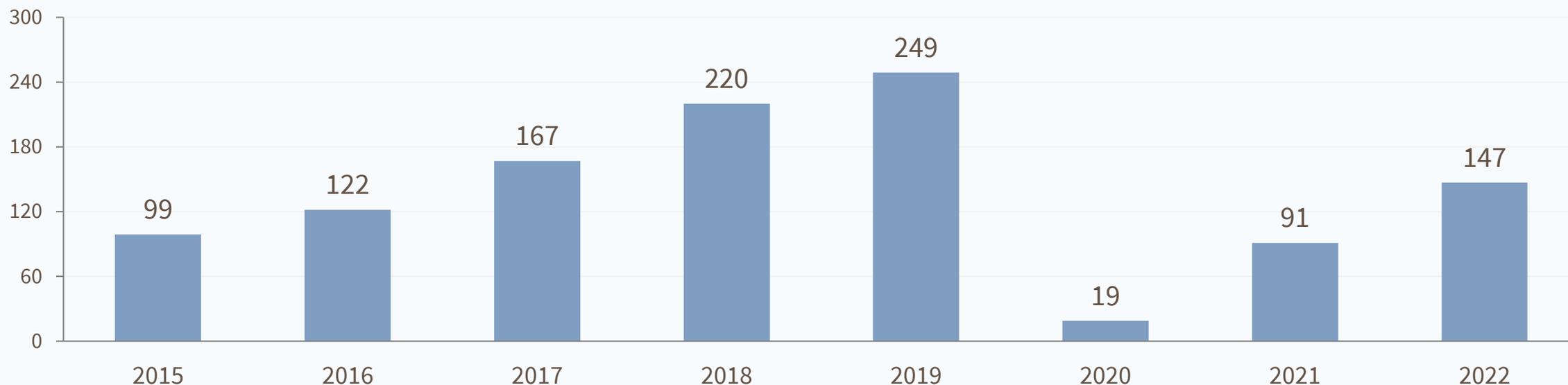
*Lifetime gross has been estimated for films that are still running in theatres
For films released in multiple languages, only Marathi versions have been reported in this chart*

LANGUAGE-WISE PERFORMANCE PUNJABI FILMS



Punjabi: Domestic Box Office

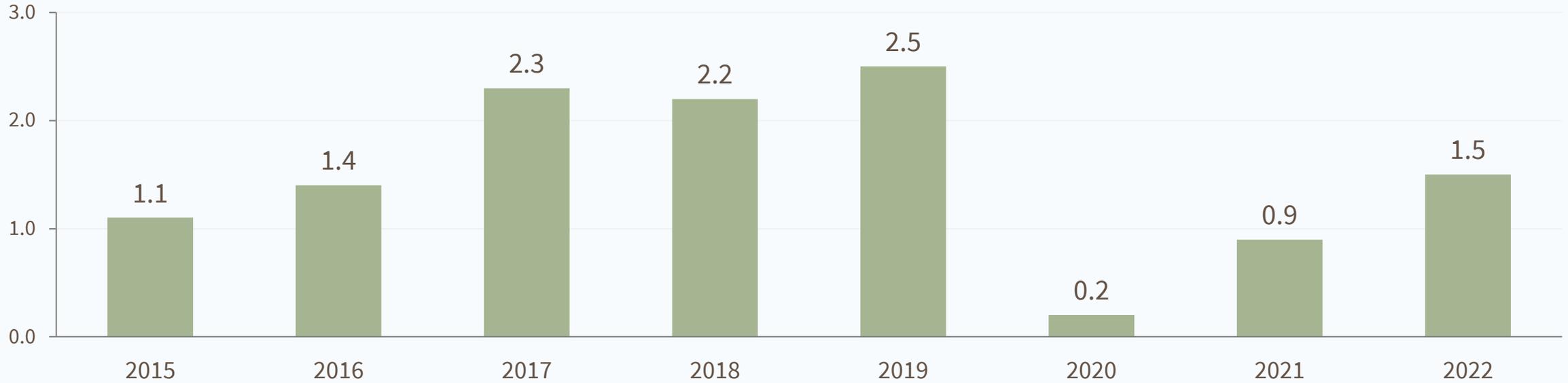
Gross Box Office (₹ Cr)



Punjabi box office saw muted recovery post-pandemic, failing to touch the ₹200 Cr mark it had achieved in 2018 & 2019.

Punjabi: Domestic Footfalls

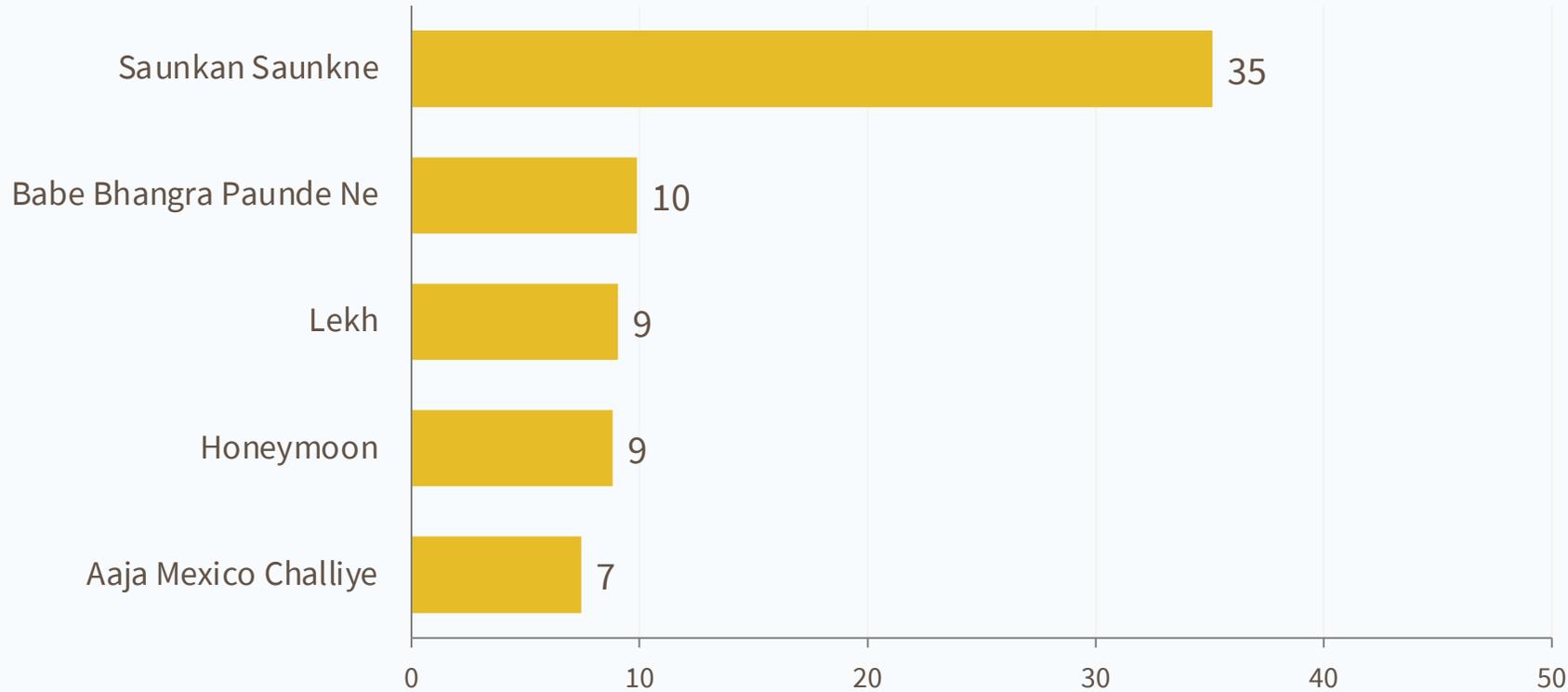
in Crore



Punjabi footfalls just managed to touch the 1.5 Cr mark, well below the 2+ Cr number seen every year from 2017 to 2019.

Punjabi: Top 5 Films

Gross Box Office (₹ Cr)



Except Saunkan Saunkne, no other film managed to perform at the box office, with only five films grossing ₹5 Cr or more.

There were periods during the year where there were no major releases, highlighting pandemic-led disruption in the Punjabi film industry.

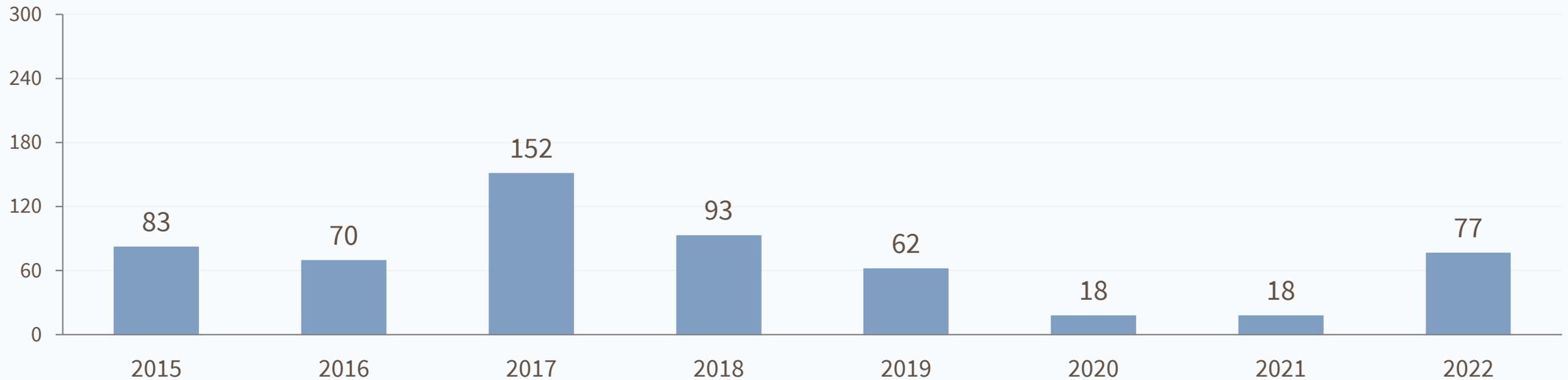
Lifetime gross has been estimated for films that are still running in theatres

LANGUAGE-WISE PERFORMANCE BENGALI FILMS



Bengali: Domestic Box Office

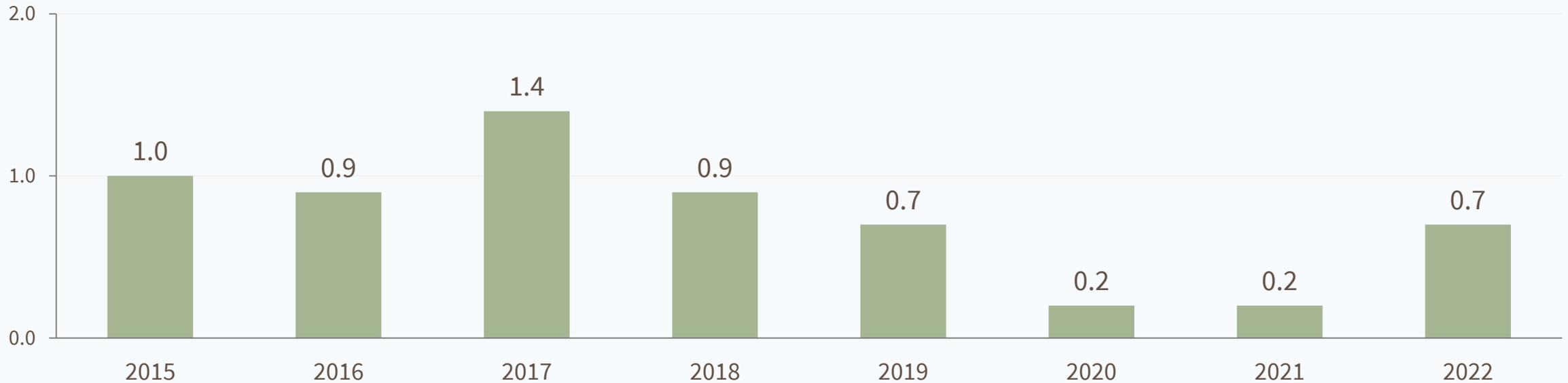
Gross Box Office (₹ Cr)



At ₹77 Cr, Bengali box office recovered to pre-pandemic levels, but did not witness major growth like some of the other languages.

Bengali: Domestic Footfalls

in Crore



Bengali cinema lacked the big blockbusters, with only Kishmish and Projapati crossing the ₹5 Cr mark, resulting in total annual footfalls being only 7 Mn.

Methodology

All box office data in this report has been compiled and analysed using information collected from various credible industry sources, such as producers, distributors, exhibitors and trade analysts. All figures in this report should be considered as estimates, which may vary vis-a-vis actuals by upto 5% for the Hindi, Hollywood, Telugu & Tamil, and by upto 10% for other languages.



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