

# THE ORMAX BOX OFFICE REPORT

2020 & 2021





# Executive Summary (1/2)

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- The pandemic severely impact the Indian box office in 2020 & 2021, with the cumulative gross box office from two years being just ₹ 5,757 Cr, which is more than ₹ 5,000 Cr lower than what the Indian film industry grossed in 2019 alone
- 2020 saw an 81% drop in box office collections vis-à-vis 2019. Aided by the last quarter (Oct-Dec), 2021 registered a recovery and closed at ₹ 3,701 Cr, vis-à-vis just ₹ 2,056 Cr in 2020
- Of the eight quarters in 2020 & 2021, three were washouts because of theatres being closed, and two others showed negligible business. Jan-Mar 2020, Jan-Mar 2021 and Oct-Dec 2021 contributed to 87% of the gross box office from 2020 & 2021 put together
- Footfalls dropped from 103.0 Cr in 2019 to 22.5 Cr in 2020, before recovering to 42.7 Cr in 2021



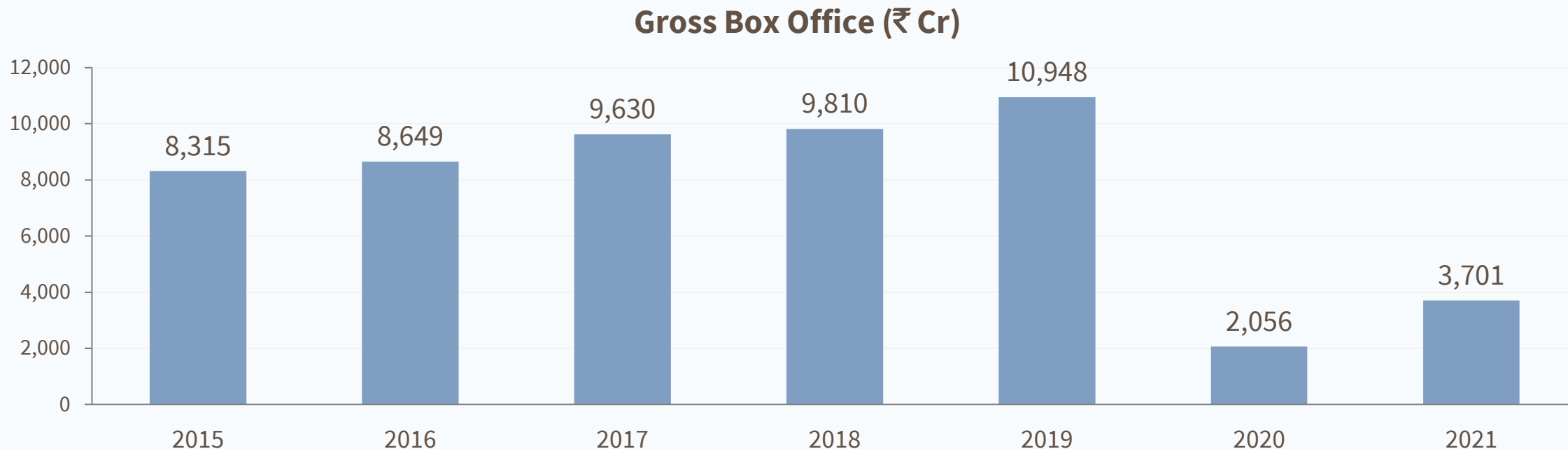
# Executive Summary (2/2)

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- With very few major Hindi releases in the pandemic years, Hindi cinema's share of box office fell from 44% in 2019 to just 27% in 2020-21. Hollywood also saw a drop in share from 15% to 11%
- The four South languages showed better performance than Hindi and Hollywood, aided by major releases when theatres were open. Their contribution to domestic box office increase from 36% in 2019 to 59% in 2020-21
- Telugu cinema was the strongest industry in the pandemic years, with 28% share of box office in 2020-21. Of the top 10 films across the two years, four came from the Telugu industry
- The top 5 films of 2020-21 (cumulative box office across languages) were: Tanhaji, Pushpa, Spider-Man: No Way Home, Sooryavanshi & Ala Vaikunthapurramuloo

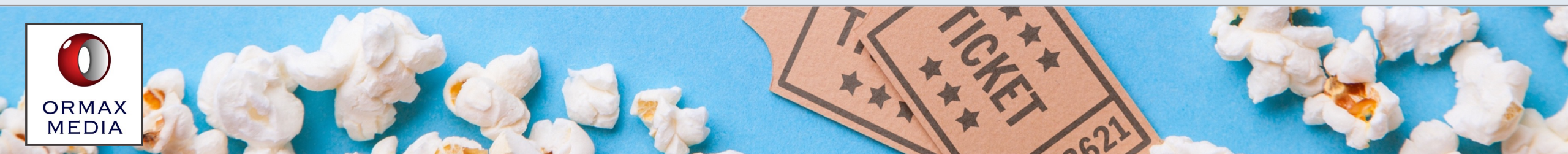


# Domestic Box Office



With the pandemic impacting a large part of 2020, Gross Domestic Box Office saw a steep fall of 81%.

The last quarter of 2021 witnessed a recovery, resulting in the year crossing the ₹ 3,500 Cr mark.

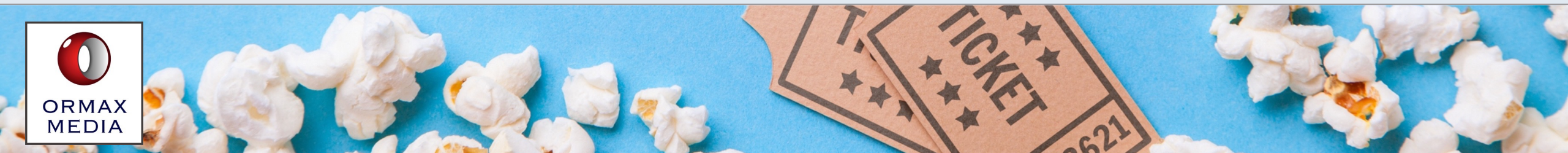


# Domestic Footfalls

in Crore



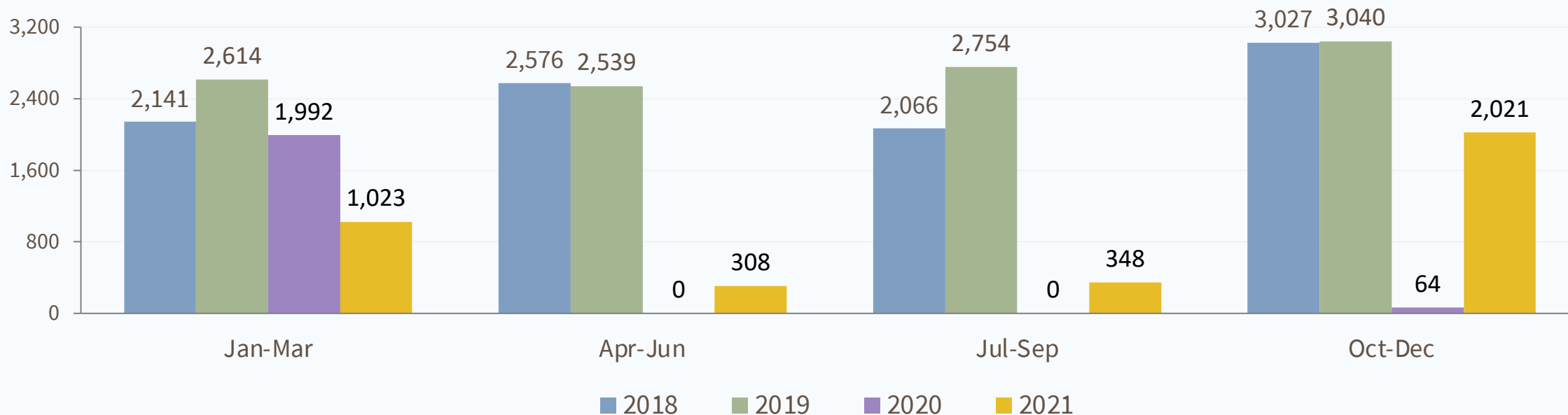
2019 had seen a record 103 Cr footfalls, but that momentum was halted by the onset of the pandemic in March 2020.





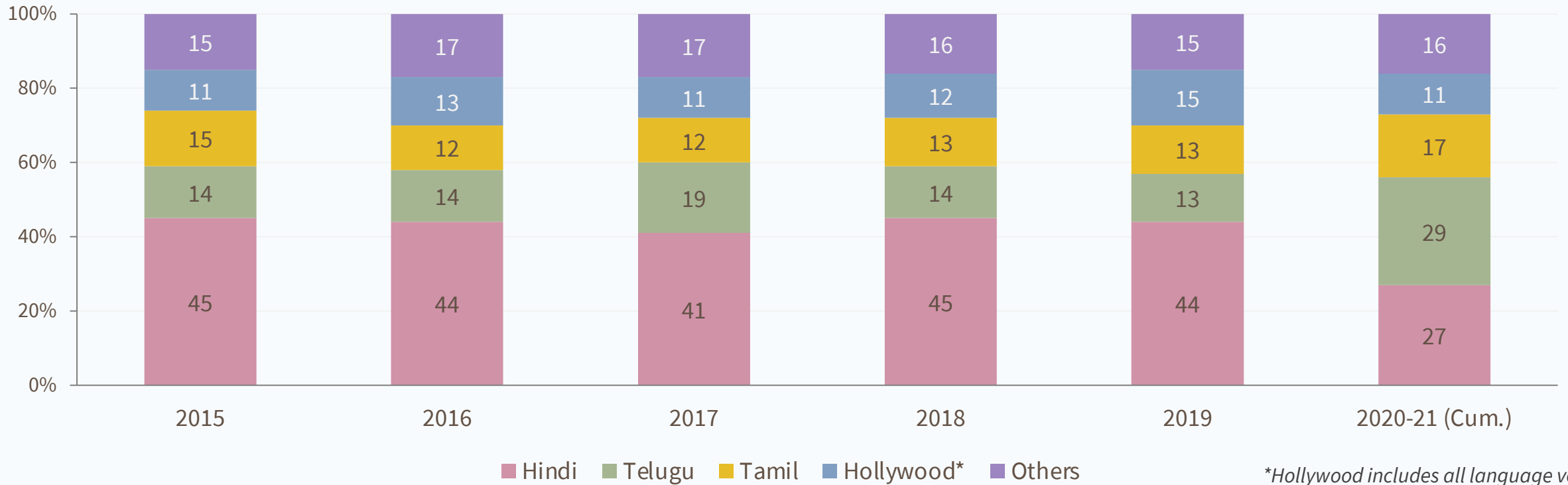
# Quarterly Box Office

Gross Box Office (₹ Cr)



The last quarter of 2021 was the best quarter since 2019, with the gross box office crossing the ₹ 2,000 Cr mark again.  
Just two quarters (Jan-Mar 2020 & Oct-Dec 2021) account for 70% of the cumulative box office of 2020 & 2021.

# Box Office Share by Language



Because of more big-ticket releases compared to Hindi and Hollywood, Telugu and Tamil languages saw an increase in their contribution to total domestic box office in 2020-21, with Telugu emerging has the biggest language in this period.



# Box Office by Language

Language	Gross BO (2019)	Gross BO (2020-21 Cum.)	% Share (2019)	% Share (2020-21 Cum.)
Hindi	4,831	1,534	44	27
Telugu	1,404	1,648	13	29
Tamil	1,460	985	13	17
Hollywood*	1,595	632	15	11
Kannada	522	414	5	7
Malayalam	604	334	5	6
Punjabi	249	110	2	2
Bengali	62	36	1	1
Marathi	111	31	1	1
Gujarati	62	14	1	0
Others	48	18	0	0

All four South languages garnered a higher share of the total domestic BO in the pandemic years, with a combined share of 59%, vis-à-vis 36% in 2019.

Telugu is the only language in which the combined BO of 2020 & 2021 exceeded the 2019 number.

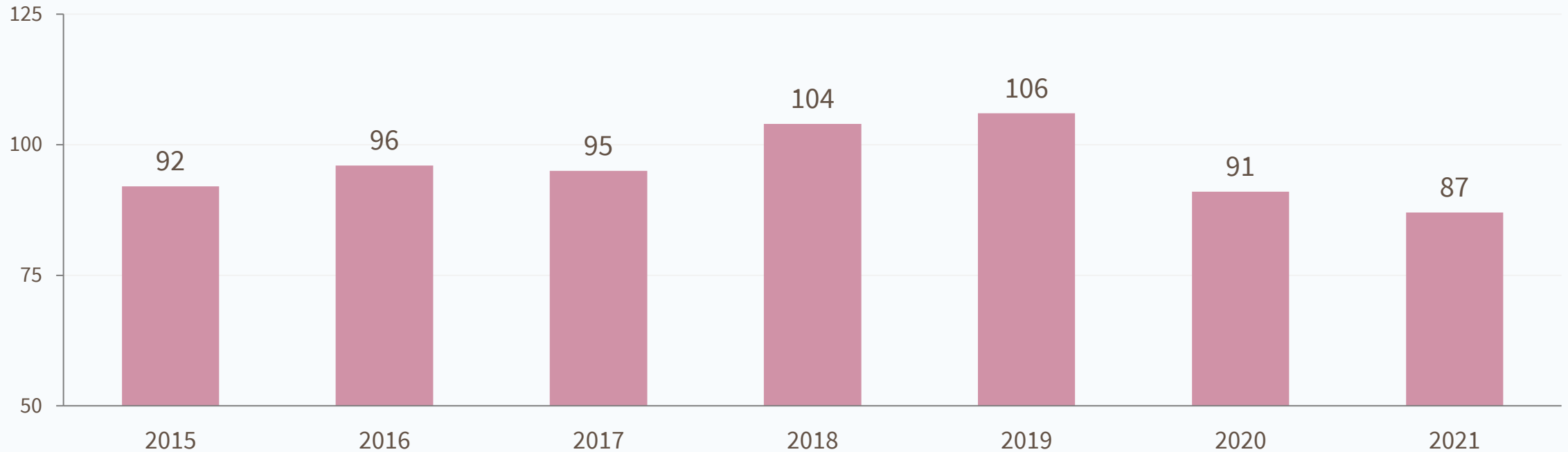
Gross BO figures in ₹ Cr

\*Hollywood includes all language versions

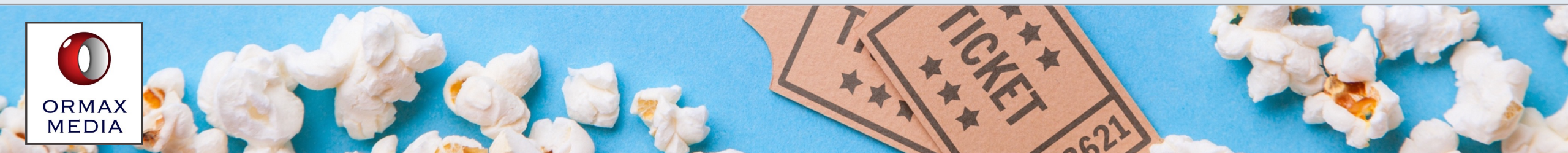




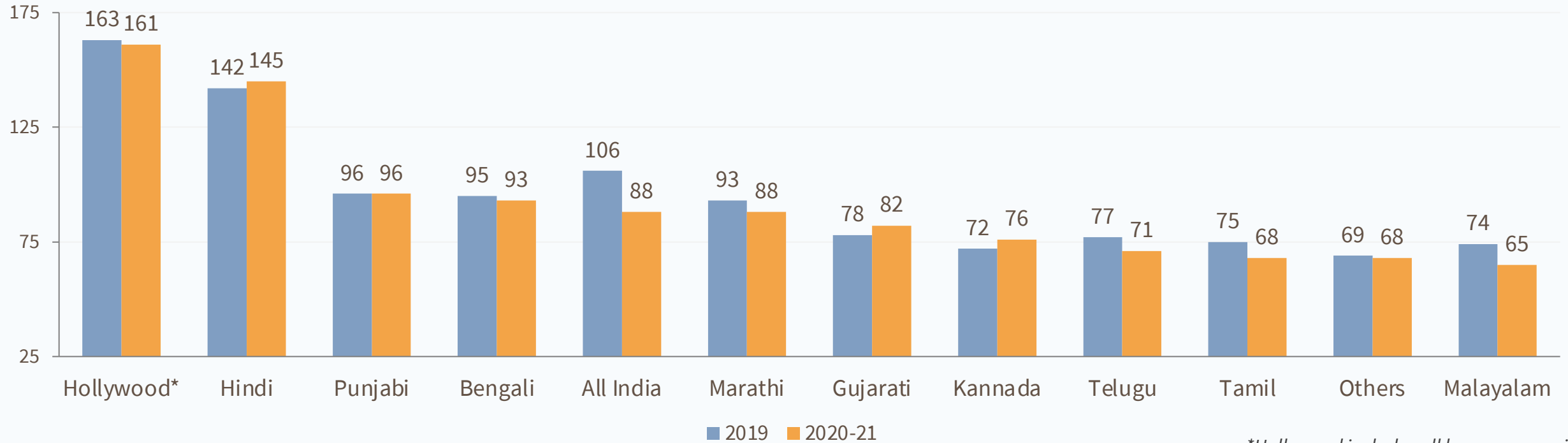
# Average Ticket Price (₹)



The change in taxation and the growth in Hollywood BO was a major driver of ATP rise in 2018 & 2019. ATP is lower in the pandemic years because of higher contribution from the South markets, which have a lower operating ATP than Hindi & Hollywood.



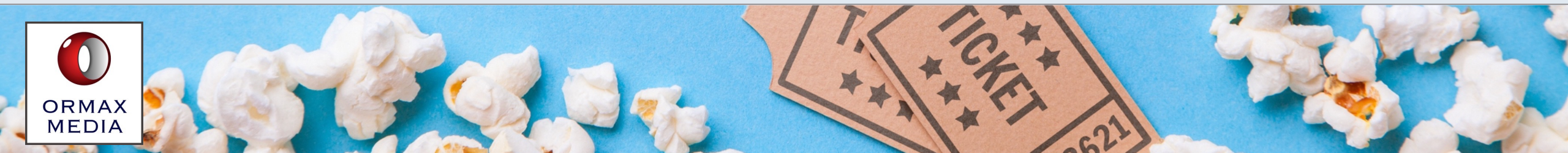
# ATP (₹) by Language



\*Hollywood includes all language versions

ATP in most languages remained at the 2019 level in 2020 & 2021.

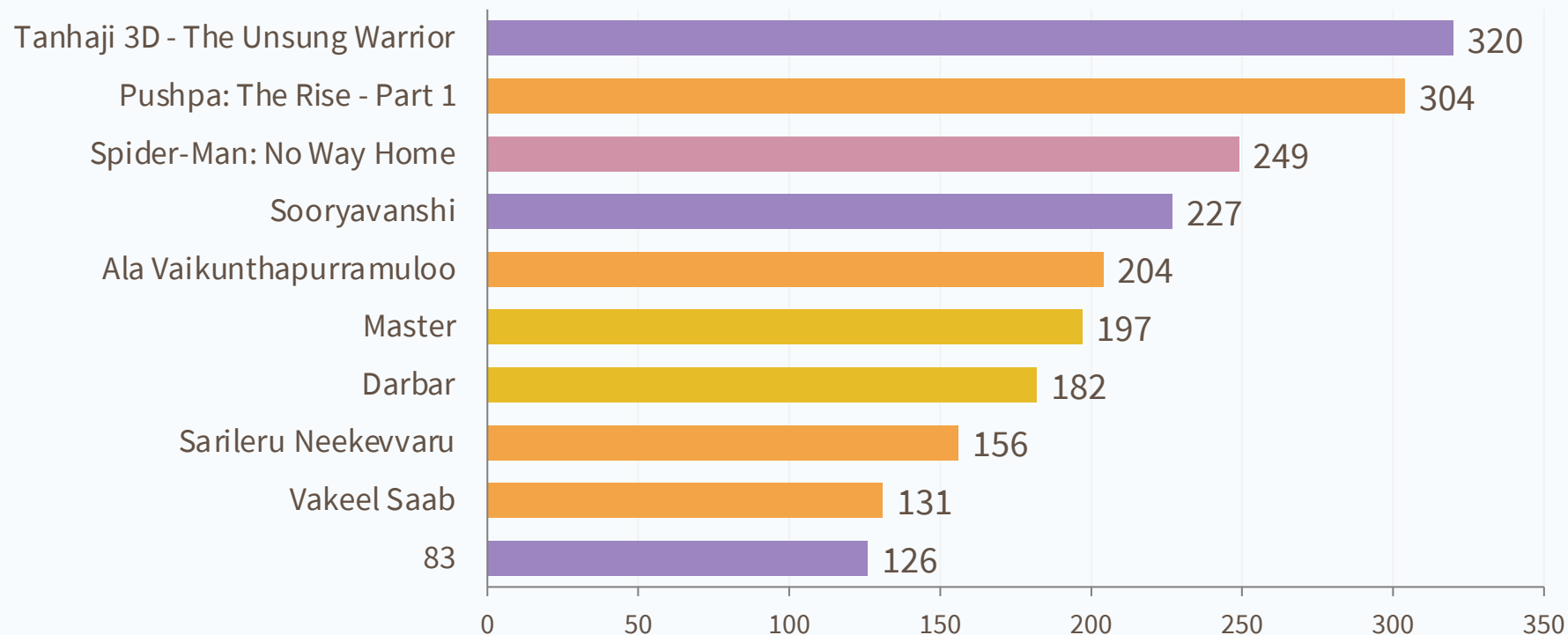
However, the overall ATP dropped from 106 to 88 because of drop in the BO share of Hindi + Hollywood from 59% to 38%.





# Top 10 Films (2020 & 2021)

## Gross Box Office (₹ Cr)



The top 10 combined list for 2020 & 2021 comprises of four Telugu films, three Hindi films, two Tamil films and one Hollywood film.

With 6 out of 10 films in the list (and Annaatthe at no. 11 by a narrow margin), the pandemic period marked the dominance of South cinema at the Indian box office.

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





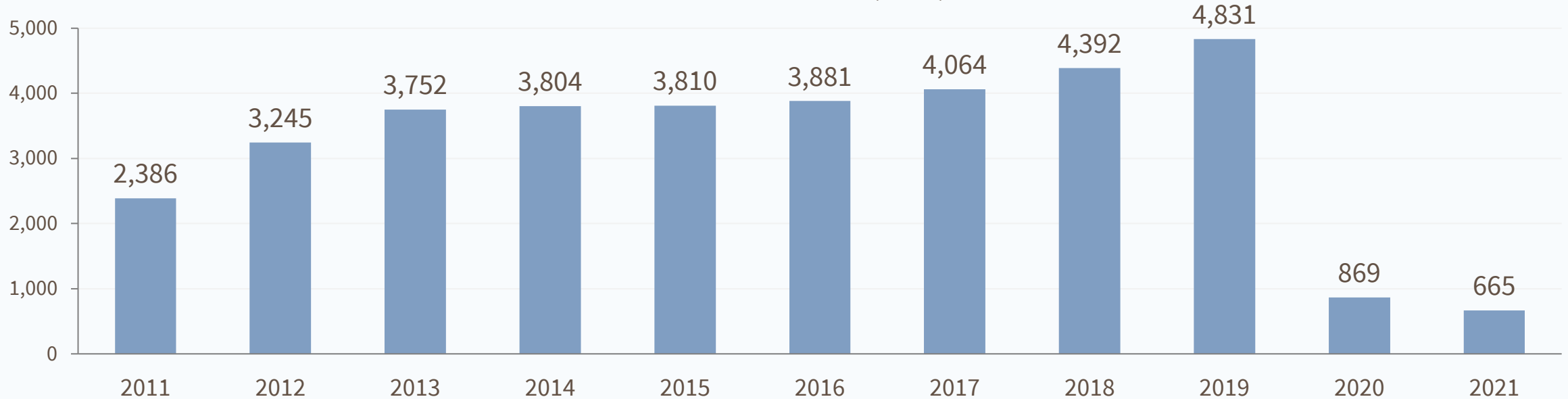
# HINDI FILMS





# Hindi: Domestic Box Office

Gross Box Office (₹ Cr)

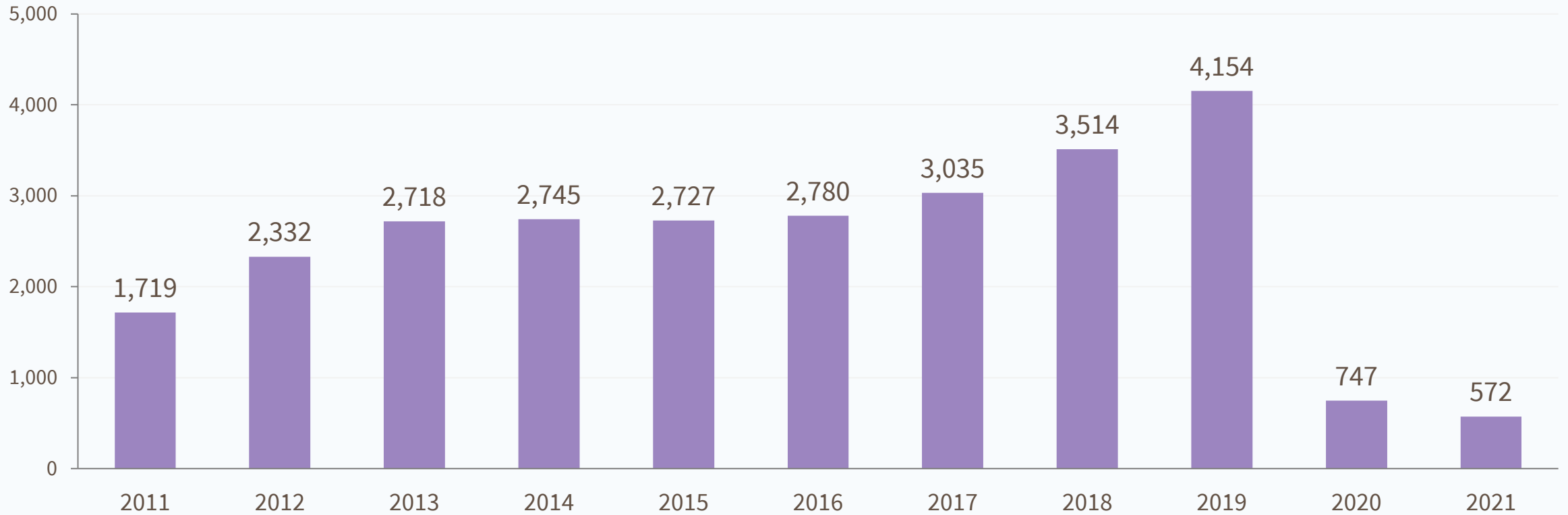


With only a few big releases (Tanhaji, Sooryavanshi, Baaghi 3, Pushpa & 83), Hindi box office plummeted below the ₹ 1,000 Cr mark in both the pandemic years.



# Hindi: Domestic Box Office

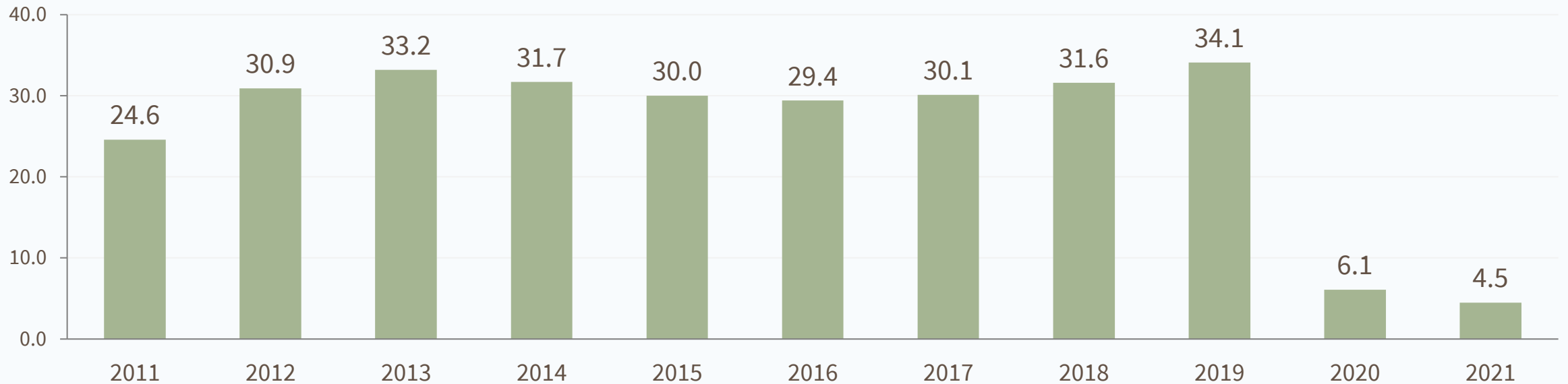
Nett Box Office (₹ Cr)



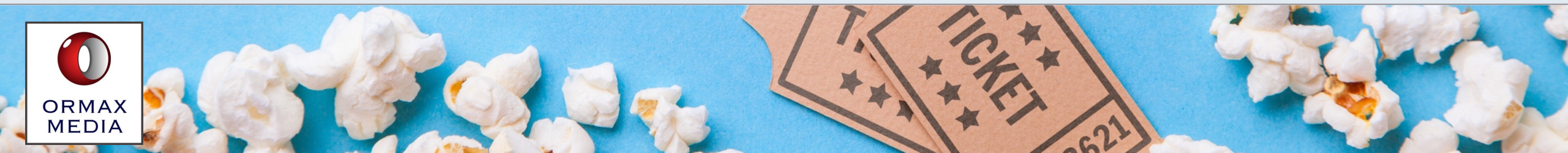


# Hindi: Domestic Footfalls

in Crore



2020 and 2021 witnesses 82% and 87% drop in footfalls respectively, vis-à-vis 2019.





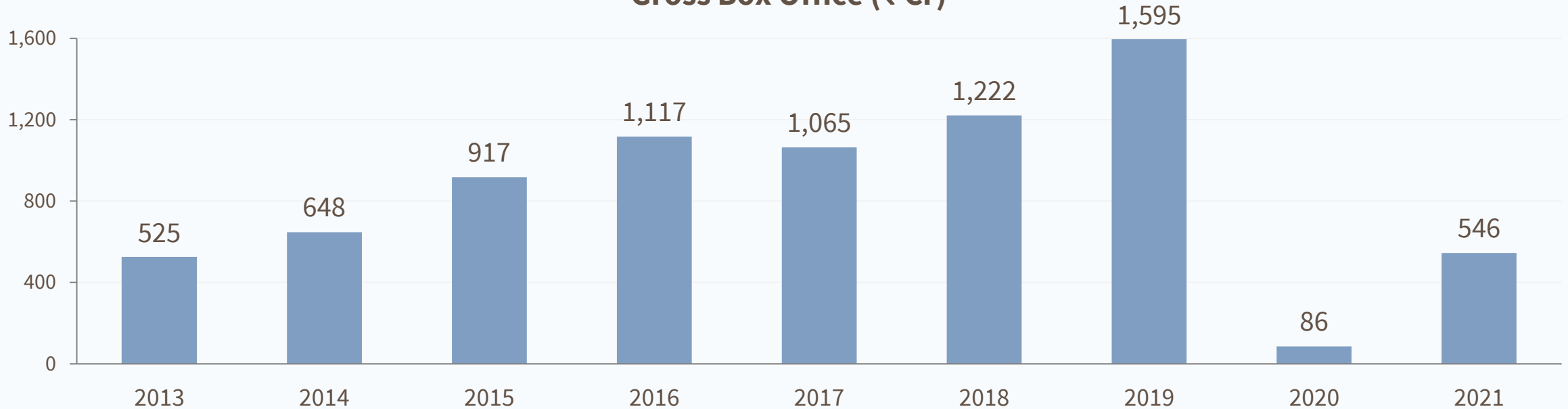
# HOLLYWOOD FILMS





# Hollywood: India Box Office

Gross Box Office (₹ Cr)



After a washout year in 2020, Hollywood BO saw good recovery in 2021, primarily because of Spider-Man: No Way Home grossing ₹ 250 Cr, followed by Godzilla vs. Kong and other MCU films like Eternals, Venom: Let There Be Carnage & Shang-Chi.



# Hollywood: India Box Office

Nett Box Office (₹ Cr)

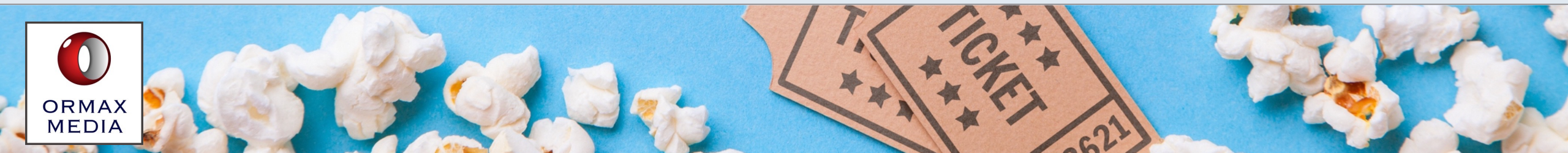


# Hollywood: India Footfalls

in Crore



Hollywood footfalls in India dropped below the 1 Cr mark in 2020, in which the biggest film (Wonder Woman: 1984) grossed only ₹ 16 Cr (1.1 Mn footfalls).





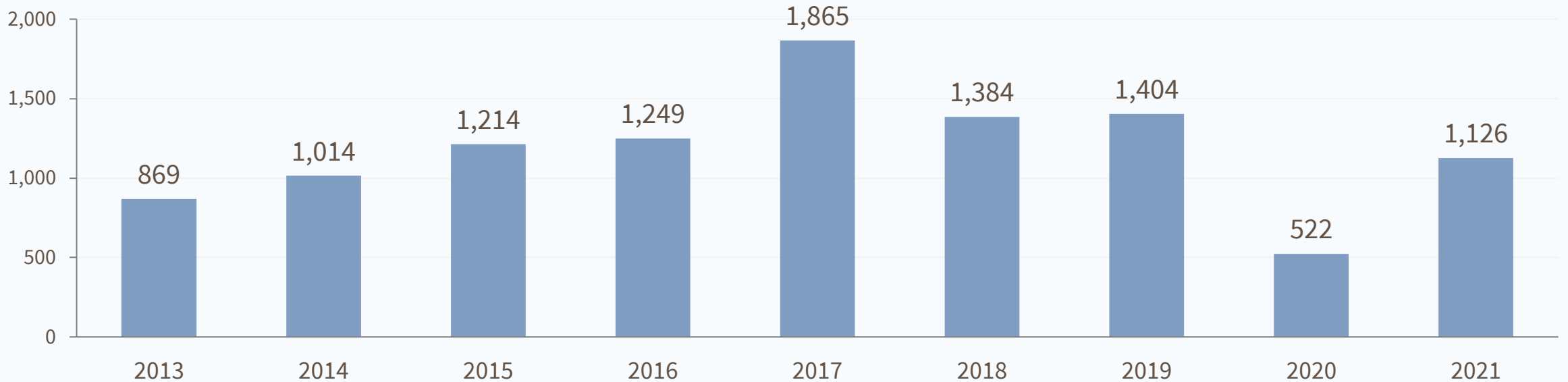
# TELUGU FILMS





# Telugu: Domestic Box Office

Gross Box Office (₹ Cr)

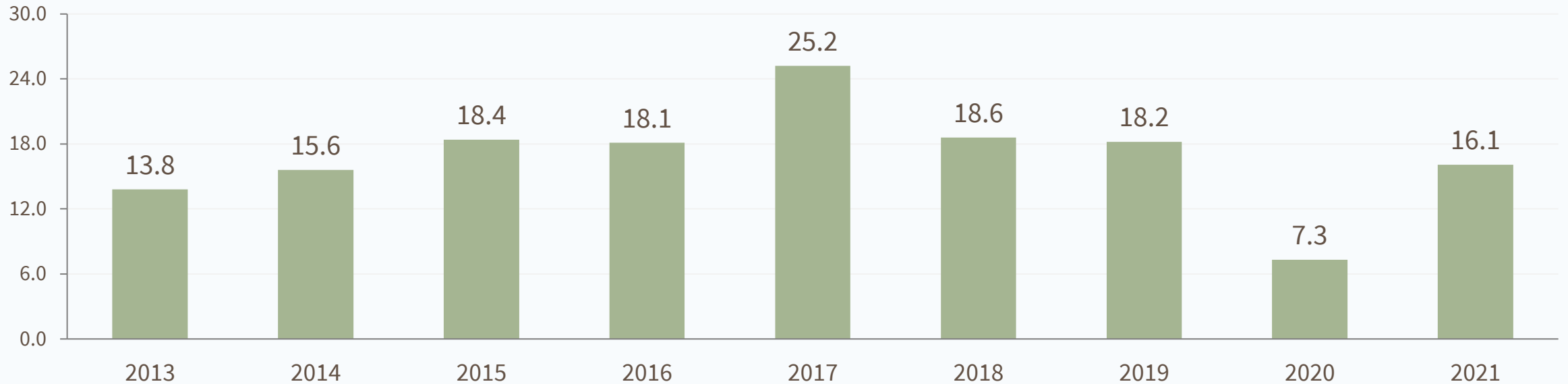


Despite the severe impact of the pandemic, Telugu BO grossed above ₹ 1,100 Cr in 2021, not much lower than the operating levels in the 2015-2019 period (with the exception of 2017, when Bahubali 2 released).

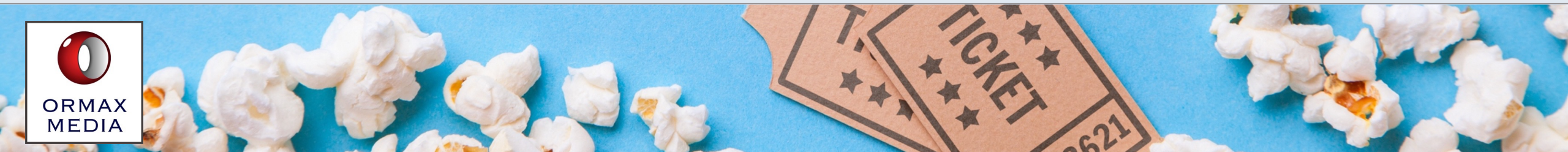


# Telugu: Domestic Footfalls

in Crore



At 16.1 Cr, Telugu footfalls in 2021 were only a notch lower than Tamil, Hindi & Hollywood footfalls in the same year put together.





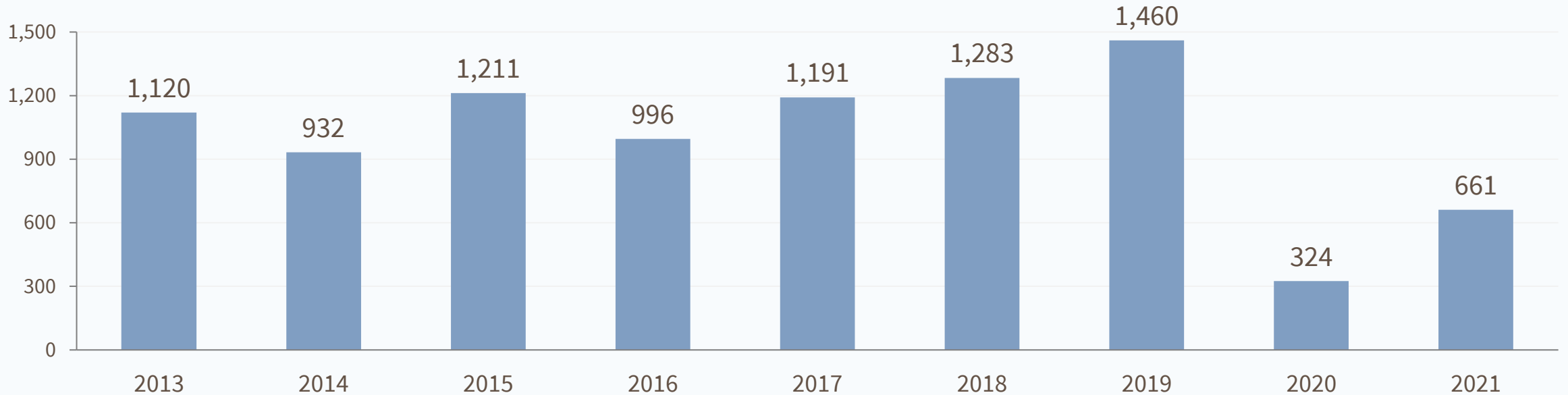
# TAMIL FILMS





# Tamil: Domestic Box Office

Gross Box Office (₹ Cr)



In comparison with Telugu, recovery of Tamil box office was somewhat muted in 2021, which closed at 45% of the 2019 level, vis-à-vis the same proportion being 80% for Telugu.





# Tamil: Domestic Footfalls

in Crore



In the absence of any ₹ 150+ Cr Gross BO or 2+ Cr footfalls films except Master, Tamil BO's recovery was subdued.





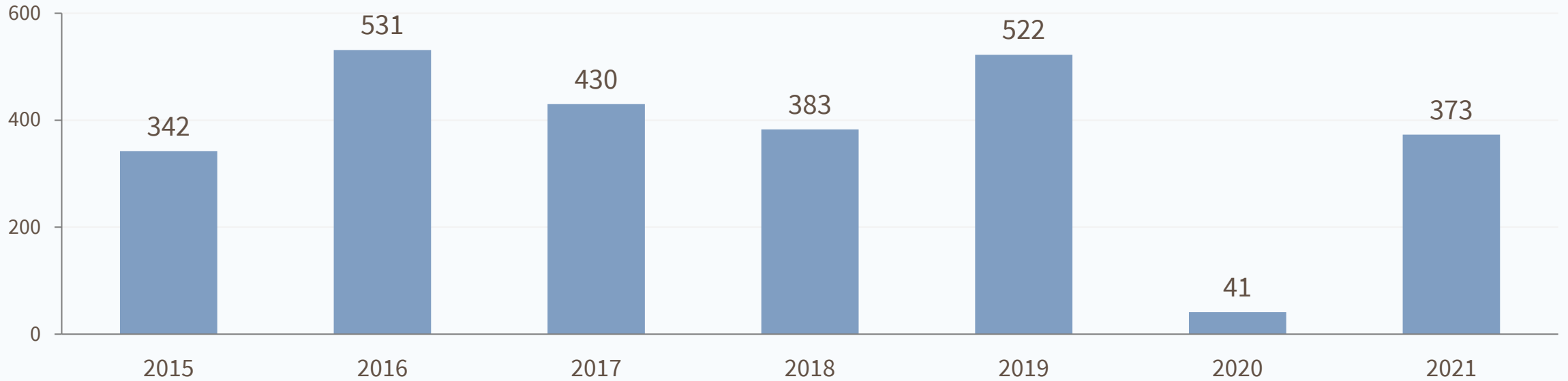
# KANNADA FILMS





# Kannada: Domestic Box Office

Gross Box Office (₹ Cr)

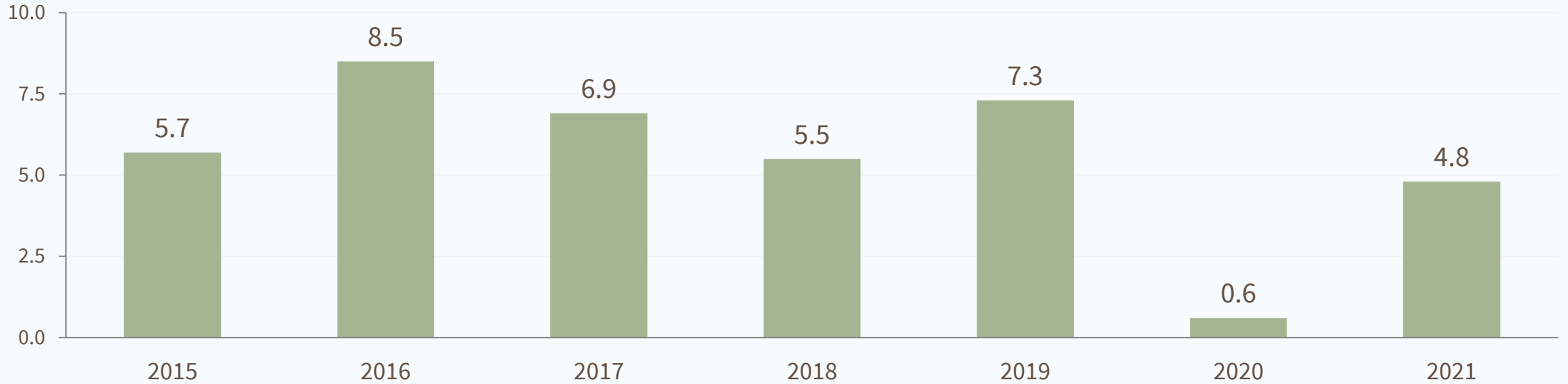


After negligible box office in 2020, Kannada box office staged good recovery in 2021, on the back of films like Roberrt, Yuvarathnaa, Pogaru & Kotigobba 3.

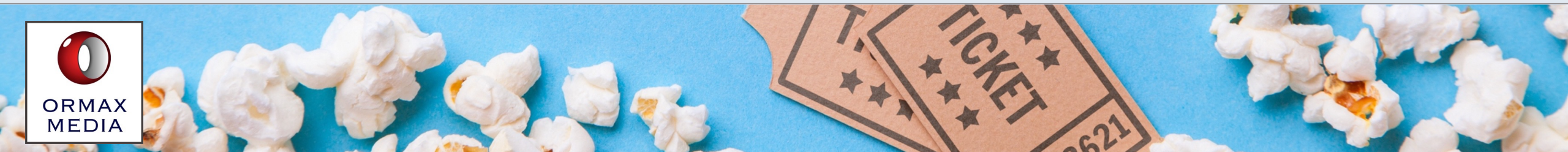


# Kannada: Domestic Footfalls

in Crore



In 2021, Kannada footfalls recovered to almost touch the 5 Cr mark, not too far behind the 2018 level.



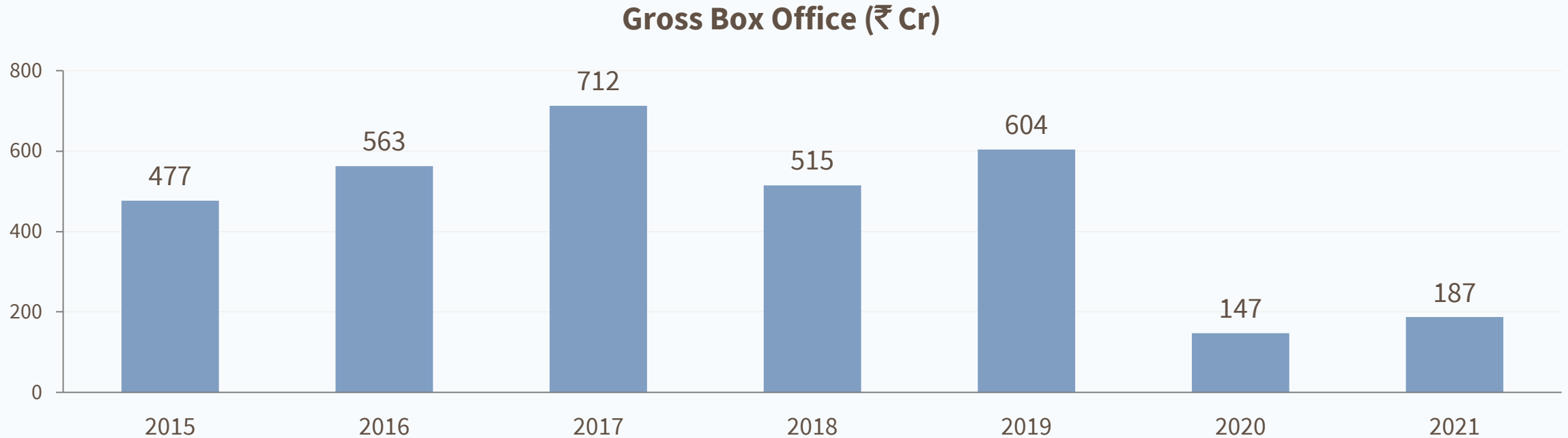


# MALAYALAM FILMS

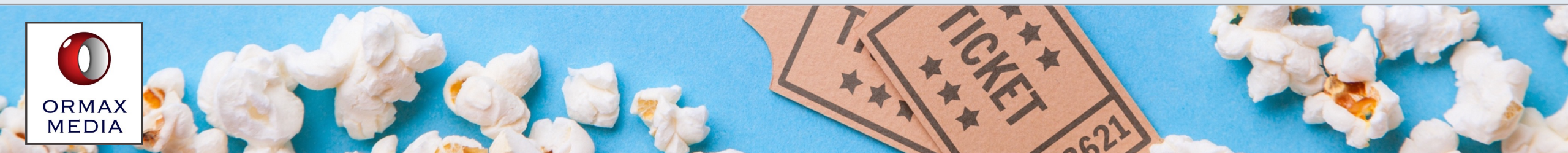




# Malayalam: Domestic Box Office



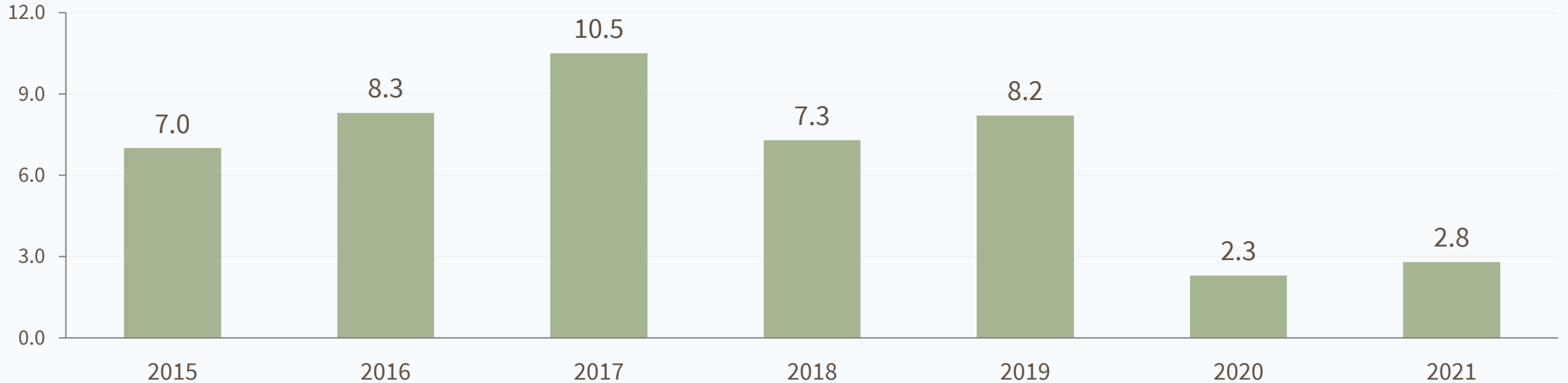
While Malayalam cinema has witnessed buzz and appreciation on streaming platforms during the pandemic, the box office remained low in 2020 & 2021. Kerala Government's COVID policies being more stringent than other South Indian states was a key factor.





# Malayalam: Domestic Footfalls

in Crore



Malayalam BO had seen higher footfalls than Kannada every year since 2017.

However, Kannada footfalls surged ahead of Malayalam in 2021.





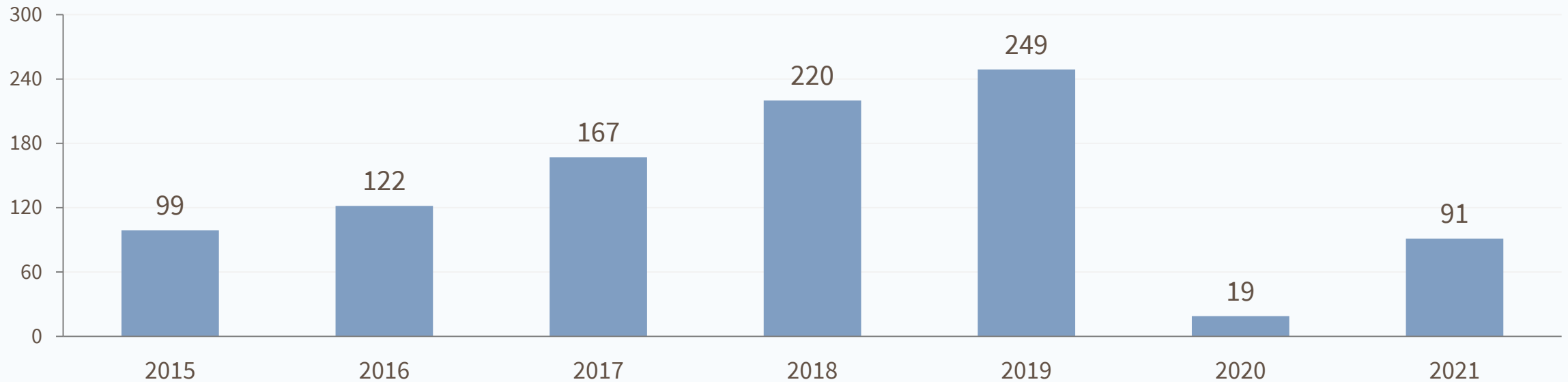
# PUNJABI FILMS





# Punjabi: Domestic Box Office

Gross Box Office (₹ Cr)



Till the pandemic put the brakes on its growth, Punjabi cinema had been on an ascendancy since 2016, with every year registering higher BO than the previous year.



# Punjabi: Domestic Footfalls

in Crore



After three consecutive years of 2+ Cr footfalls, Punjabi cinema fell below the 1 Cr mark during the pandemic years. However, 2021 saw good momentum in the later half, with three films (Honsla Rakh, Qismat 2 and Chal Mera Putt 3) generating good footfalls.



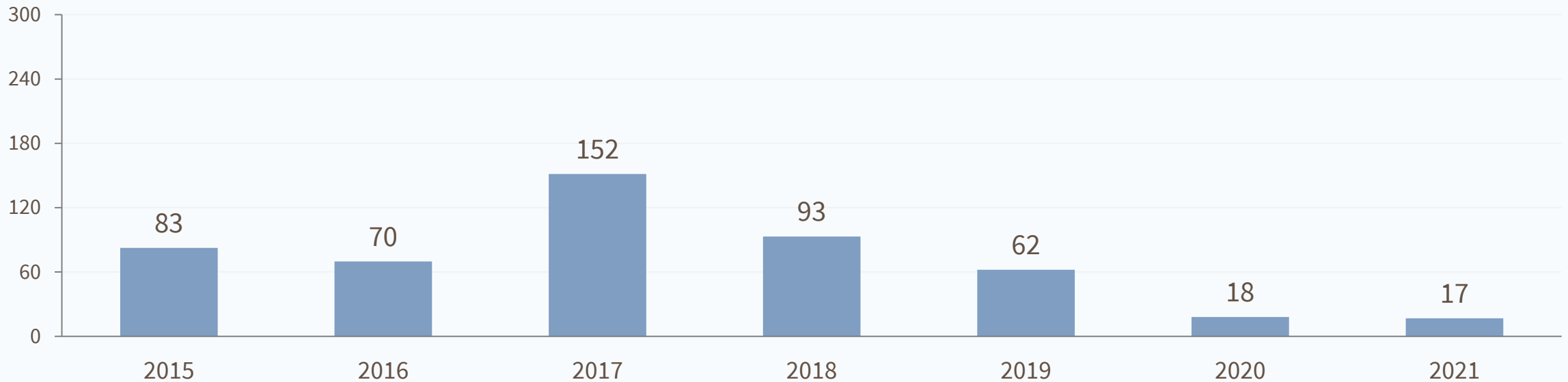
# BENGALI FILMS





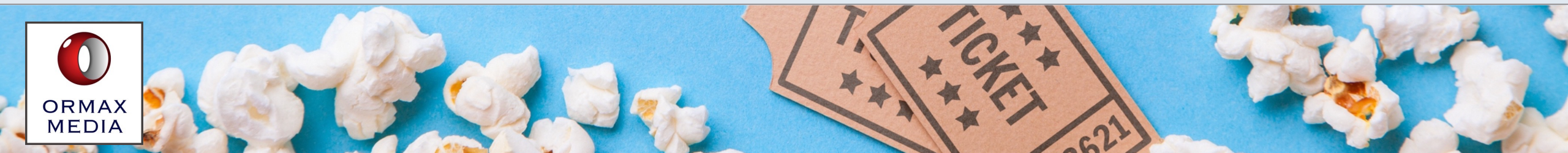
# Bengali: Domestic Box Office

Gross Box Office (₹ Cr)



After a strong year in 2017, led by Amazon Obhijaan, Bengali BO had been on a decline leading up to the pandemic.

With negligible BO in 2020-21, recovery to 50 Cr+ levels will be a challenge in 2022.



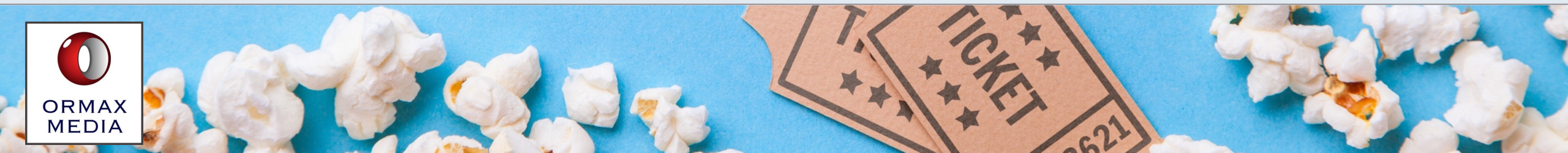


# Bengali: Domestic Footfalls

in Crore



The implementation of GST resulted in an increase in ATP from mid-2017, negatively impacting footfalls for Bengali cinema.





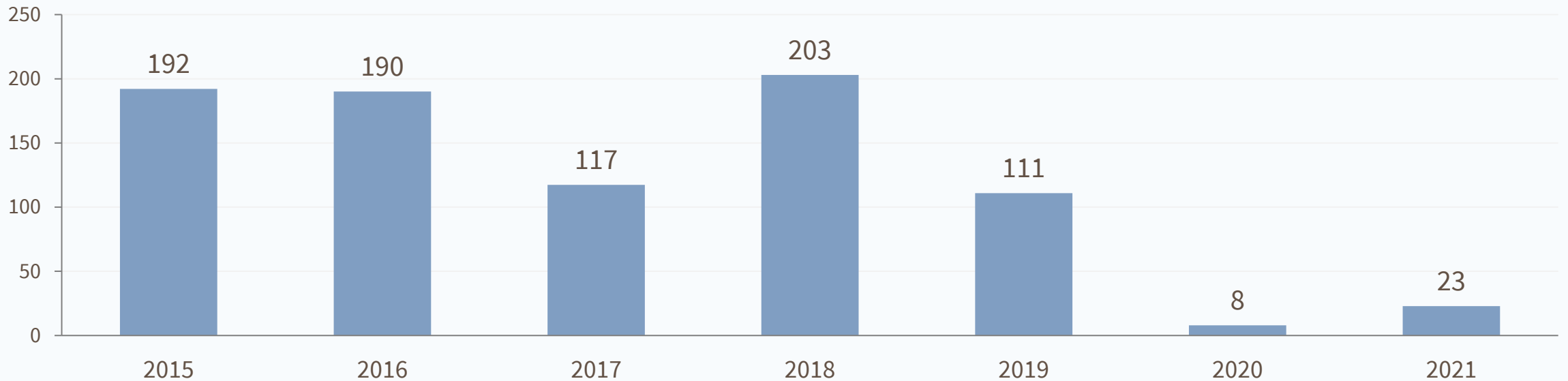
# MARATHI FILMS





# Marathi: Domestic Box Office

Gross Box Office (₹ Cr)



Marathi cinema was struggling with structural issues in any case, leading to inconsistent BO performance. The pandemic has brought the category to negligible levels, from where it will need to rebuild.



# Marathi: Domestic Footfalls

in Crore



Marathi cinema's peak footfalls date back to 2015. Implementation of GST in mid-2017, resulting in higher ATP for the consumer, was one of the factors that contributed towards the decline in footfalls over time.





# Methodology

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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.

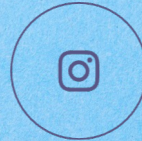
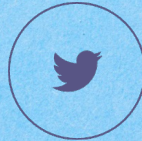
Collections reported for a particular calendar year include collections of all films released that year, including the part that may have come from early weeks of the next calendar year.







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