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SOUTH AFRICA
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Annual Box Office Report South Africa (January – December 2018)

EXECUTIVE SUMMARY

- ❖ South Africa's (SA) total Box Office earnings for the year 2018 amounted to R1,3 billion, an increase of 9% when compared to 2017;
- ❖ A total of 213 films were released in South African cinemas; 22 of which were locally produced;
- ❖ These 22 titles earned a total of R50 million in Box Office revenues recording an increase of 12% compared to the year 2017;
- ❖ 12 of the 22 locally produced films were partially funded by the NFVF. These films earned a total of R21 million;
- ❖ The market share of locally produced films in 2018 was 4%;
- ❖ The top-earning domestic films in 2018 were:
 - ***Frank and Fearless*** opening with 95 screens and earning a total of R7,8 million in revenues;
 - ***Stroomop*** opening with 57 screens at release, earning R7,4 million;
 - ***Ellen: Die Storie van Ellen Pakkies***, which was allocated 35 screens, was the third highest performing local film, making R6 million at the cinema.
- ❖ The highest grossing films in South Africa were:
 - ***Black Panther*** (grossing over R107 million);
 - ***Avengers: Infinity War*** (at R73 million); and
 - ***Aquaman*** (at R55 million).
- ❖ *Action/Adventure* was the highest earning genre, followed by *Animation*, and *Action/Sci-fi*;
- ❖ A total of 52 3D/4DX/IMAX format films were released and these accounted for 65% of the total Box Office gross.

(To see the half-yearly Box Office Report for 2018, [Click Here](#)).

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LIST OF ABBREVIATIONS

AUS	Australia
BEL	Belgium
BOG	Box Office Gross
BRA	Brazil
CAN	Canada
CHN	China
CBD	Crystal Brook Distribution
SPN	Spain
EE	Empire Entertainment
FRA	France
GER	Germany
HK	Hong Kong
IFD	Indigenous Films Distribution
IND	India
ITL	Italy
MEX	Mexico
NETHER	Netherlands
NFVF	National Film and Video Foundation
NZ	New Zealand
POL	Poland
SA	South Africa
SPN	Spain
SCI-FI	Science Fiction
SWE	Sweden
S.KOR	South Korea
UAE	United Arab Emirates
UIP	United International Pictures
UK	United Kingdom
USA	Unites States of America

DEFINITION OF KEY TERMS

- ❖ **Gross Box Office:** is measured in terms of the number of tickets sold at the cinema or the amount of money raised by ticket sales (revenues).
- ❖ **Market Share:** is the percentage of an industry or market's total sales that is earned over a specified period. It is calculated by adding domestic gross and dividing by the Total Gross Box Office figure.
- ❖ **SA/Locally produced:** refers to films that are shot and produced by South Africans, and shot in South Africa, and further includes films classified as '*National Films*' by virtue of having received official co-production status by the NFVF.
- ❖ **Foreign/International:** refers to films that are produced outside of South Africa.
- ❖ **Movie:** a cinematographic and/or theatrical film.
- ❖ **Cumulative:** refers to a figure that grows in quantity.
- ❖ **Compound Annual Growth Rate (CAGR):** is a measure of growth over multiple time periods.

Note: In order to provide a fair comparison between theatrical films released, all rankings are based on ticket sales.

1. Introduction

The Annual Box Office Report is a consolidation of South Africa's Top 25 reports which show the performance of films released at the Box Office. This information is collected from South African film distributors namely; Filmfinity, Empire Entertainment, United International Pictures, Indigenous Film Distributors, Blacksheep Films, Gravel Road Distribution, and CMD Entertainment Africa, and is made available by Filmfinity. This report is compiled on a half-yearly basis with the first publication accounting for the January – June period, followed by an Annual Box Office overview report from January – December. The data is sourced from Filmfinity and the Box Office Mojo website (available online at [Box Office Mojo, 2018](#)).

An important limitation is that films cannot be monitored once they are out of cinema circuit or not in South Africa's Top 25 list. Therefore, all the figures quoted in this report are for the period during which the film was still competing in the Top 25.

This report analyses the performance of local films and highlights some of the highest earning titles for the 2018 period. The information on Box Office gross, type of genres distributed, number of domestic films released and an indication of the market share for South Africa will also be reported on to give an indication of what drives audience consumption of films in South Africa.

For the various films that were exhibited on South African theatrical cinema, the following indicators are analysed:

- Gross Box Office revenue;
- Market Share of local films;
- Distributors;
- Genre Classification;
- Country of Origin;
- Films per Language;

2. Box Office Trends

Moviegoers were spoiled with a variety of choices in 2018: from the release of *Black Panther* (Action/Adventure), *Incredibles 2* (Animation), *Aquaman* (Action/Sci-fi), *Night School* (Comedy), *Tyler Perry's Acrimony* (Thriller) and local films: *Frank and Fearless* (Comedy), *Stroomop* (Adventure), *Ellen: Die Storie van Ellen Pakkies* (Drama), *Five Fingers for Marseilles* (Western Thriller) and *Inxeba* (Drama/Romance) just to name a few.

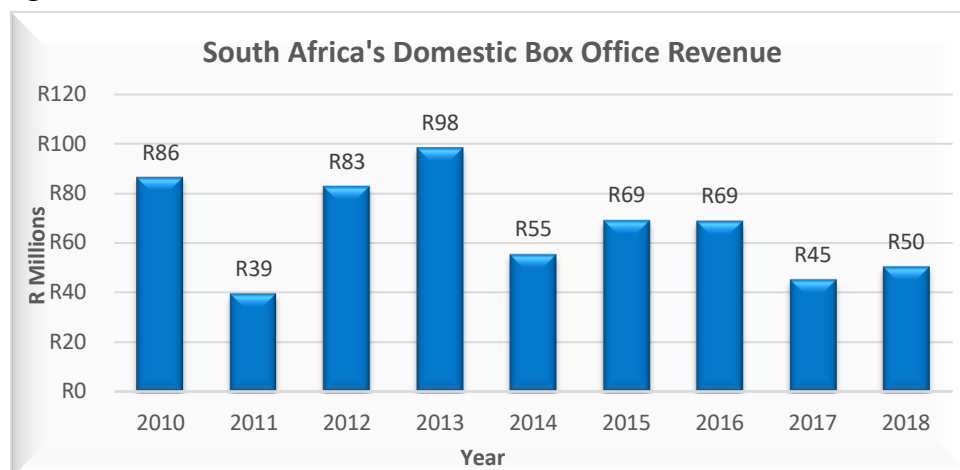
However, South African consumers were under tremendous pressure, which was further aggravated by economic factors such as an increase in food and petrol prices as well as an increase in Value Added Tax (effective as of 1 April 2018) - all of which put pressure on the average consumer, and possibly led to less spending on theatrical films or attendance at the cinema. Lack of consumer spending is illustrated by Box Office results which will be discussed in detail below.

2.1 South Africa's Domestic Box Office Revenue

Box Office revenues generated for locally produced films in the first half of 2018 amounted to R17 million. There was an improvement in the second half of the year with earnings of R33 million. This has resulted in a combined Box Office gross of over R50 million recorded for the year 2018 with an increase of 12% from 2017.

Consumer attendance at the cinema and the lack of support for locally produced films remains a serious concern as this is evident from the revenue received at the Box Office.

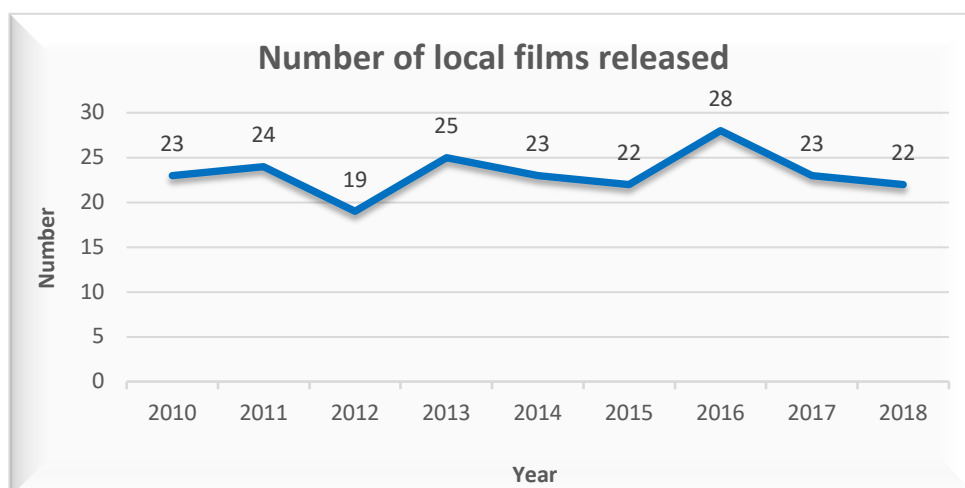
Figure 1: South Africa's Domestic Box Office Revenue, 2010 - 2018



2.2 Number of local films released

South Africa released 22 theatrical films in 2018 across different genres; comedy, drama, romance, thriller, horror and adventure films.

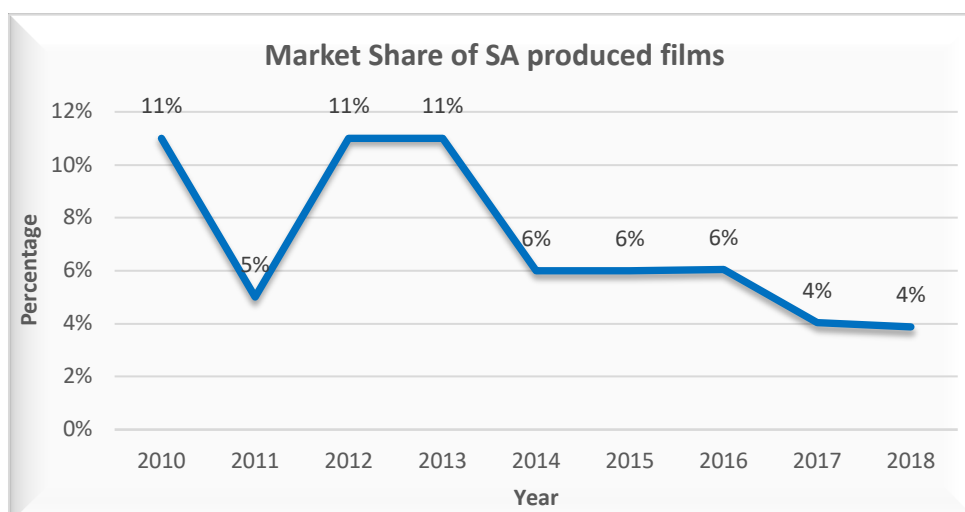
Figure 2: Number of local films released, 2010 - 2018



2.3 Market Share of domestic films

The fluctuating patterns of South African local films' market share is highlighted in Figure 3, below. Locally produced films represent only 4% of the total market share of the Box Office revenue. The percentage that represents the share of revenues for locally produced films have declined from 6% in 2016 to 4% in 2017. The pattern of market share has remained fairly constant at 4% in the past two years (2017 and 2018).

Figure 1: Market Share of SA produced films, 2010 - 2018



2.4 Indigenous language films

Out of the 22 locally produced titles, 10 of those were Afrikaans/English language films, 7 were in English, 2 in IsiXhosa/Southern Sotho, and 3 were in IsiZulu/English. The Afrikaans/English language films earned R27 million in total while English only films earned R17 million in Box Office revenue. IsiXhosa/Southern Sotho made R3,6 million and IsiZulu/English language films earned approximately R2 million in revenues.

Table 1: Indigenous Language Films

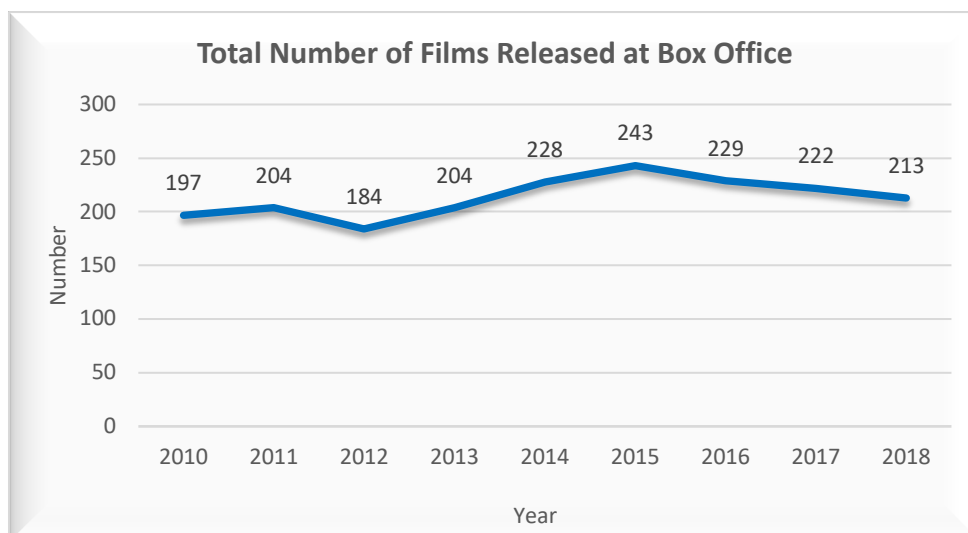
Indigenous Language			
No#	Language	Count of Movie Title	Box Office Gross (ZAR)
1	Afrikaans/English	10	R27 646 861
2	English	7	R17 053 295
3	IsiXhosa/Southern Sotho	2	R3 680 706
4	IsiZulu/English	3	R2 034 994
Grand Total		22	R50 415 856

Source: NFVF database

2.5 Total number of films released at Box Office

The number of films released annually at the Box Office has remained constant, releasing an average of 213 per year.

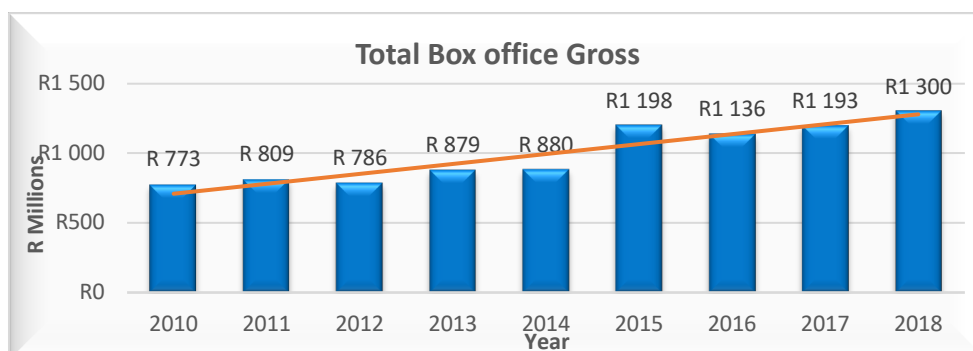
Figure 2: Total number of films released at Box Office, 2010 - 2018



2.6 Total Box Office Gross

The total earnings for the 213 films released at the Box Office in 2018 amounted to R1,3 billion, a 9% growth of the 2017 results. The NFVF is delighted to note that the total Box Office gross has been on an increasing trend since 2010.

Figure 3: Total Box Office Gross for films released in South Africa, 2010 - 2018



The forecast of the Box Office revenues for the next five years (2019-2023) is depicted in Table 2, below. These figures are the estimates of the future Box Office performance based on the current trends. The projected statistics show that Box Office gross will continue to rise, at 4% Compound Annual Growth Rate (CAGR).

Table 2: South Africa's Box Office Gross, 2014 - 2023 (R millions)

Year	Historical Data					Forecast Data					CAGR %
	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2018-2023
Gross Box Office	R880	R198	R136	R193	R300	R392	R283	R500	R1 391	R607	4%
YOY Growth	-	36%	-5%	5%	9%	7%	-8%	17%	-7%	16%	-

Source: NFVF database

CAGR - Compound Annual Growth Rate

3. Top performing theatrical films

3.1 Top 10 – South African produced films

Table 3, below, illustrates the performance of South African produced films. Some of the films were well-received by the audience and performed quite well at the Box Office.

Frank and Fearless was the top performing local title, opening with 98 screens and earning a cumulative gross of R7,8 million for seven weeks on circuit). **Stroomop** (allocated 57 screens at its release) followed, earning R7,4 million for its 9 weeks on circuit with the film. **Ellen: Die Storie van Ellen Pakkies** (allocated 35 screens) was the third highest performing local film, making R6 million for the 8 weeks it ran in cinemas. The remaining top 10 films on the list earned revenues between R1,8 million and R5,0 million.

Table 3: Top 10 – South African produced films

Top 10 - SA Produced Films					
No#	Movie Title	No# of Weeks	No# of Screens	BOG at Release	Box Office Gross (ZAR)
1	Frank and Fearless	7	98	R1340 342	R7873 349
2	Stroomop	9	57	R2 547 451	R7 407 835
3	Ellen: Die Storie van Ellen Pakkies	8	35	R968 408	R6 085 624
4	Broken Promises: 4-Ever	13	15	R1 029 775	R4 280 383
5	Susters	10	37	R1 012 632	R4 141 651
6	Baby Mamas	12	61	R723 281	R3 222 353
7	Thys En Trix	6	43	R604 343	R2 738 908
8	Raaiselkind	4	33	R397 413	R1 978 783
9	The Wound (Inxeba)	10	19	R598 571	R1 950 353

10	Looking for Love	9	46	R443 953	R1 833 520
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Source: NFVF, Filmfinity, Box Office Mojo

Gross Box Office = Cumulative gross up to 28 February 2019

* was still being exhibited as at 28 February 2019

3.2 Top 20 – films released in South Africa

As depicted in Table 4, films ranked by the amount earned during 2018. The highest grossing film in 2018 was ***Black Panther***, an Action/Adventure film which surpassed South Africa's Box Office charts, earning a total of R107 million. The second highest earning film, ***Avengers: Infinity War***, (also an Action/Adventure film) grossed over R73 million, and the Action/Sci-fi film, ***Aquaman***, followed, earning R54 million at the Box Office (as at 28 February 2019).

None of the local films made it to the overall Top 20 list.

Table 4: Top 20, films released in South Africa

Top 20 Films released in South Africa, 2018					
No#	Movie Title	Distributor	Genre	Box Office Gross (ZAR)	Country of Origin
1	Black Panther	Filmfinity	Action/Adventure	R107 449 011	USA
2	Avengers: Infinity War	Filmfinity	Action/Adventure	R73 134 339	UK/USA
3	Aquaman*	EE	Action/Sci-fi	R54 528 121	USA
4	Incredibles 2	Filmfinity	Animation	R52 809 096	USA
5	Bohemian Rhapsody*	EE	Biography/Drama	R41 193 600	UK/USA
6	Mamma Mia: Here we Go Again	UIP	Musical	R33 976 673	UK/USA
7	Fifty Shades Freed	UIP	Drama/Romance	R33 296 021	USA
8	Jurassic World: Fallen Kingdom	UIP	Action/Adventure	R32 349 719	UK/USA
9	Deadpool 2	EE	Action	R31 835 113	USA
10	Tyler Perry's Acrimony	Filmfinity	Thriller	R27 761 881	USA
11	Mission Impossible: Fall Out	UIP	Action	R24 867 466	UK/USA
12	Night School	UIP	Comedy	R24 142 637	USA
13	Venom	Filmfinity	Action/Sci-fi	R23 731 718	USA
14	Peter Rabbit	Filmfinity	Animation	R23 697 315	AUS/UK/USA
15	The Grinch*	UIP	Animation	R23 599 451	USA
16	Ralph Breaks the Internet*	Filmfinity	Animation	R23 549 302	USA
17	Oceans 8	EE	Action/Adventure	R22 323 881	USA
18	Bumblebee (Incl. 3D)*	UIP	Action/Sci-fi	R21 119 599	USA
19	Ant-man and the Wasp	Filmfinity	Action/Adventure	R19 117 690	USA
20	Johnny English Strikes Again	UIP	Action/Comedy	R18 960 091	FR/UK/USA

Source: NFVF database

4. Market Share by Distributor

4.1 Total market share of films per distributor

Table 5 provides an analysis of films released by local distributors; Filmfinity, Empire Entertainment, United International Pictures, Indigenous Film Distributors, Blacksheep Films, Gravel Road Distribution, and CMD Entertainment Africa. Seven distribution companies distributed a total of 213 films released in 2018.

- Filmfinity earned the largest share of Box Office revenue (with a gross taking of R517 million - 40% market share);
- Empire Entertainment (EE) accounted for a Box Office gross of R440 million, (34% of the total Box Office gross);
- United International Pictures (UIP) earned R306 million, (24% of the market share).

Table 5: Total Market Share of films by distributor

Total Market Share of films by distributor				
No#	Distributor	Count of Movie Title	Box Office Gross (ZAR)	Market Share
1	Filmfinity	86	R517 302 921	40%
2	Empire Entertainment	79	R440 200 686	34%
3	United International Pictures	28	R306 557 972	24%
4	Indigenous Film Distributors	13	R18 486 273	1%
5	Blacksheep Films	5	R16 036 285	1%
6	Gravel Road Distribution	1	R671 932	0%
7	CMD Enter. Africa	1	R608 236	0,05%
Grand Total		213	R1 299 864 305	

Source: NFVF database

5. Box Office Gross by Genre

5.1 South African produced films by Genre

Table 6, explores the different genres and their popularity with the South African audience. The pattern of popular genres is determined by a few high grossing titles. Table 6, depicts the popular genres in 2018 for locally produced films. The top three genres were: *Comedy, Adventure and Drama*. The Comedy genre generally which generally has a wide audience appeal in South Africa, grossed at R15 million). Adventure grossed at over R11 million, and the Drama genre earned R9,5 million.

Table 6: SA produced films by genre

SA produced films by genre				
No#	Genre	Count of Movie Title	Box Office Gross (ZAR)	Top performing title
1	Comedy	4	R15 668 130	Frank and Fearless
2	Adventure	2	R11 549 486	Stroomop
3	Drama	6	R9 576 665	Ellen: Die Storie van Ellen Pakkies
4	Comedy/Drama	1	R4 280 383	Broken Promises: 4-ever
5	Comedy/Drama/Romance	2	R2 544 102	Catching Feelings
6	Drama/Romance	1	R1 950 353	The Wound (Inxeba)
7	Drama/Thriller/Western	1	R1 730 353	Five Fingers for Marseilles
8	Thriller	2	R1 453 806	Nommer 37
9	Drama/Musical/War	1	R1 444 756	Kanarie
10	Horror	1	R143 113	The Tokoloshe
11	Drama/Crime	1	R74 709	Mayfair
Grand Total		22	R50 415 856	

Source: NFVF database

5.2 Total gross of films released in South Africa by Genre

The top-earning genre of all films released at the Box Office was *Action/Adventure* with a total gross of R311 million. This was followed by *Animation* which earned R215 million in revenues, and the *Action/Sci-fi* genre at R115 million in Box Office revenues.

Table 7: Total number of films released in SA by genre

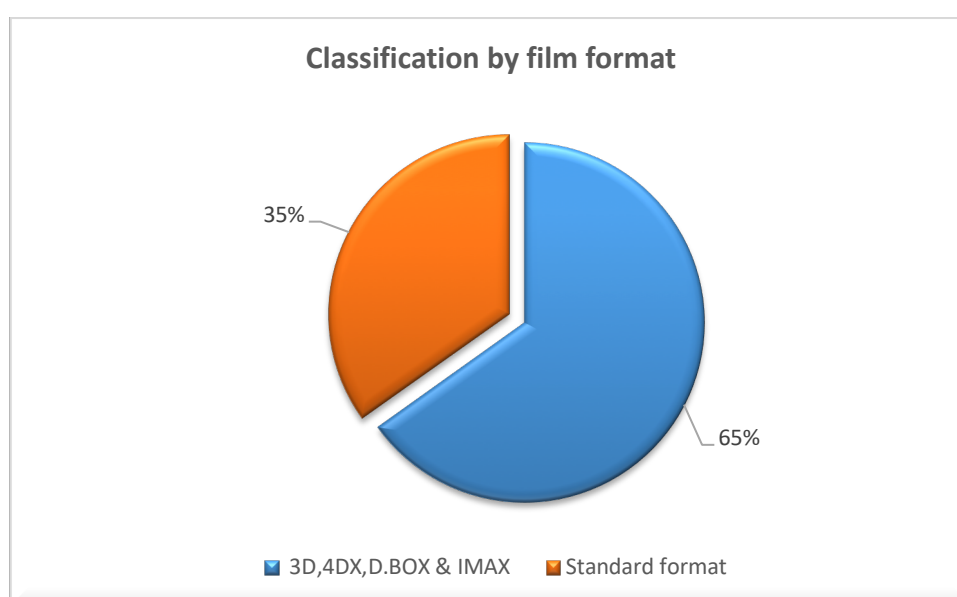
Top 20 Films released in SA by Genre				
No#	Genre	Count of Movie	Box Office Gross (ZAR)	Top performing title
1	Action/Adventure	13	R311 346 556	Black Panther
2	Animation	25	R215 725 297	Incredibles 2
3	Action/Sci-fi	9	R151 059 009	Aquaman
4	Comedy	21	R72 832 441	Night School
5	Action/Thriller	10	R71 796 438	Mission Impossible - Fallout
6	Thriller	12	R69 735 033	Tyler Perry's Acrimony
7	Biography/Drama	2	R41 875 793	Bohemian Rhapsody
8	Comedy/Drama	9	R40 585 023	Instant Family
9	Drama	41	R38 139 709	Ellen: Die Storie van Ellen Pakkies
10	Drama/Romance	3	R37 072 618	Fifty Shades Freed
11	Musical	1	R33 976 673	Mamma Mia: here we go again
12	Action/Comedy	4	R33 880 059	Johnny English strikes again
13	Horror	11	R19 615 631	The Nun
14	Adventure	4	R18 679 469	Stroomop
15	Sci-fi/Thriller	2	R18 606 983	The Meg
16	Adventure/Fantasy	1	R17 969 609	Fantastic Beasts: the crimes of Grindelwald
17	Drama/Musical	1	R13 977 412	A Star is born
18	Family/Fantasy	1	R13 321 921	Mary Poppins returns
19	Comedy/Romance	2	R9 653 051	Crazy Rich Asians
20	Adventure/Sci-fi	2	R9 304 429	Maze Runner: The death cure

Source: NFVF database

6. 3D/4DX/IMAX format

Figure 6, compares Box Office revenues earned by film format, which provides an indication of how well these formats perform in the South African market. 52 titles in the 3D, 4DX, D. Box & IMAX formats accounted for a significant 65% of the total Box Office gross (R846 million) for the period under review. The top three previously - mentioned films (*Black Panther*; *Avengers: Infinity War* and *Aquaman*) remained the most popular top releases in these formats. The titles that were released in the standard format accounted for 35% (R453 million).

Figure 4: 3D/4DX/IMAX format



7. Country of Origin

As depicted in Table 8, 22 local films were released (which accounted for 4% of the total Box Office revenue). Most of the films released in South Africa in 2018 originated from the USA (i.e. 99 titles, accounting for 61% of the total Box Office earnings).

30 UK/USA collaborations were released and these shared 30% of the total Box Office revenue.

Table 8: Country of Origin

Country of Origin			
No#	Row Labels	Count of Movie Title	Box Office Gross (ZAR)
1	USA	99	R789 314 084
2	UK/USA	30	R327 563 166
3	SA	22	R50 415 856
4	CHINA/USA	5	R28 435 776
5	AUS/UK/USA	1	R23 697 315
6	FRA/UK/USA	1	R18 960 091
7	CAN/USA	3	R12 114 152
8	UK	9	R6 401 616
9	CAN/S.KOR/USA	1	R5 489 869
10	FRA/UK	2	R4 987 938
11	SPAIN	3	R4 560 950
12	CAN	2	R3 172 637
13	NZ/USA	1	R2 830 342
14	GER/AUS	1	R2 253 604
15	HK/ICE/USA	1	R2 024 915
16	SWE/UK/USA	1	R1 873 438
17	MEX/UK/USA	1	R1 684 525
18	CAN/GER/SWE/USA	1	R1 584 553
19	RUSSIA	2	R1 289 035
20	GER/UK	1	R1 123 997

8. Conclusion

In conclusion, the performance of local films at the Box Office for the year under review has improved from that in 2017. 2018's domestic revenue amounted to R50 million (i.e. a 12% increase from R45 million in 2017).

The overall theatrical revenues for 2018 totalled R1,3 billion (a 9% increase from R1,2 billion).

The pattern of market share has remained at a fairly constant 4% increase for the past two years.

- ❖ The highest grossing film in 2018 was *Black Panther* (an *Action/Adventure* movie which surpassed South Africa's Box Office charts earnings by earning R107 million. The second highest earning film was *Avengers: Infinity War*, another *Action/Adventure*, grossing over R73 million while the *Action/Sci-fi* film *Aquaman* followed, earning R54 million at the Box Office (as at 28 February 2019);
- ❖ Filmfinity dominates the distribution space, having distributed the largest number of titles for the past three years;
- ❖ *Action/Adventure*, *Animation*, *Action/Sci-fi* remained the most popular genres liked by audiences.
- ❖ *Comedy* and *Drama* were the highest grossing genres for locally produced films;
- ❖ With the advancement of technology, there has been a steady increase in films released in 3D, 4D, and IMAX formats which accounted for 65% of the total Box Office gross. The standard format earned only 25% of the total Box Office revenues;
- ❖ The top-performing films in South Africa's Box Office charts are mostly those from the US origin with a few films being UK/USA collaborations; and
- ❖ South Africa released 22 films, while UK released 9 titles excluding the collaboration with the USA.

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