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Annual Box Office Report, South Africa January 2019 - December 2019

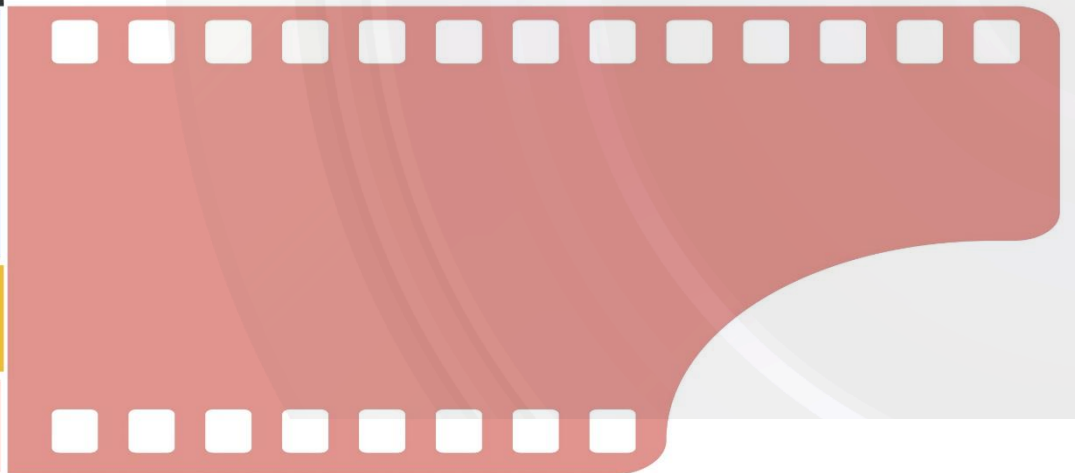
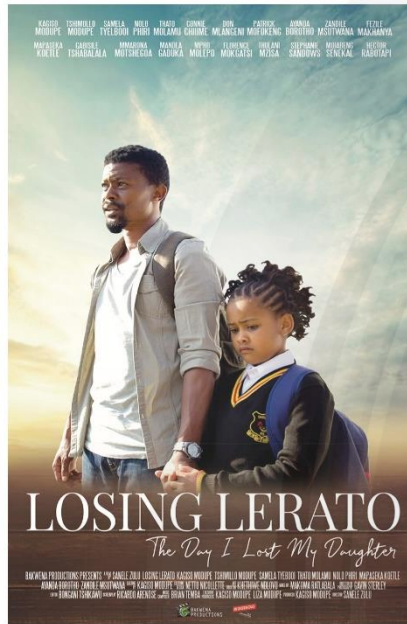


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LIST OF ABBREVIATIONS

| | |
|--------|------------------------------------|
| AUS | Australia |
| BEL | Belgium |
| BOG | Box Office Gross |
| BRA | Brazil |
| CAGR | Compound Annual Growth Rate |
| 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 | United States of America |

DEFINITION OF KEY TERMS

- ❖ **Gross Box Office:** is measured in terms of the number of tickets sold at cinema(s) 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 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 from 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 over a period of time.
- ❖ **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/box office gross.

EXECUTIVE SUMMARY

- ❖ South Africa's total box office earnings for the year 2019 amounted to R1,2 billion, a decline of 6% when compared to 2018.
- ❖ For the year 2019, South Africa released a total of one hundred and ninety (190) films in cinemas; twenty-two (22) of which were locally produced films.
- ❖ These twenty-two (22) titles earned a total of R59,7 million in box office revenues recording a significant increase of 18% compared to the year 2018.
- ❖ The NFVF partially funded seven (7) of the twenty-two (22) films that were locally produced. These films earned a total of R14,9 million.
- ❖ The market share of locally produced films in 2019 was 5%.
- ❖ The top-earning domestic films in 2019 were:
 - ***Kandasammy: The Wedding*** (this film ran for 13 weeks on circuit and earned a total of R19,2 million in box office revenues);
 - This was followed by ***Matwetwe***, which took R6,5 million of box office gross for the 12 weeks it ran in cinemas; and
 - ***Losing Lerato*** was the third top-earning domestic film that ran for 23 weeks at cinemas with a cumulative box office gross of R4,9 million.
- ❖ The highest-grossing films in South Africa were:
 - ***The Lion King*** (grossing over R120 million);
 - ***Avengers: End Game*** (at R104 million); and
 - ***Jumanji: The Next Level*** (at R70 million).
- ❖ *Animation* was the highest-earning genre overall, followed by *Action/Adventure/Sci-fi*, and then *Action/Adventure*;
- ❖ A total of forty-eight (48) 3D/4DX/IMAX format films were released and these accounted for 68% of the total box office gross.

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 the following South African film distributors:

- Filmfinity;
- Empire Entertainment;
- United International Pictures;
- Indigenous Film Distributors;
- Blacksheep Films;
- Gravel Road Distribution; and
- Nolava International Film Distributors and is made available by Filmfinity.

This report is compiled bi-annually with the first publication reporting January – June period, followed by an annual box office report from January – December period. The data is sourced from Filmfinity and the Box Office Mojo website (available online at [Box Office Mojo, 2019](#)).

An important limitation on this report to note is that, films cannot be followed through once they are out of circuit. Therefore, all the figures quoted in this report are for the period during which the film was still competing in South Africa's Top 25 report.

The annual box office report analyses the performance of local films and highlights some of the highest-earning titles for the 2019 period. Insights will be provided on: box office gross, type of genres distributed, the number of domestic films released and their market share for South Africa. These indicators will give an indication of what drives audience consumption. The following indicators are analysed:

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

2. BOX OFFICE TRENDS

This analysis covers films released in South Africa for the calendar year 2019, based on the box office data up to and including 23 February 2020. South African films performed significantly well at the box office with an 18% increase from 12% in 2018.

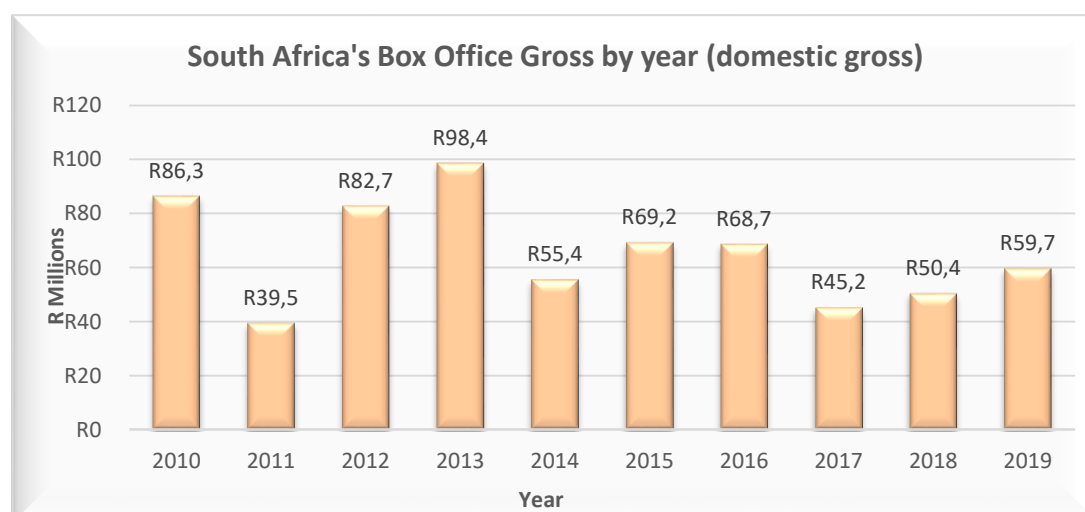
National power outages due to load shedding by Eskom have negatively impacted the economy as a whole and the growth of the entertainment sector as they disrupt both business transactions and individual households. Cinema complexes are not immune from these disruptions and some complexes had to shut down in instances where there were no scheduled outages. Despite the above, box office earnings thrived nonetheless.

Below we discuss the box office trends that emerged from the data received.

2.1 South Africa's domestic box office revenue

Figure 1 below, illustrates the performance of theatrical produced domestic films. It can be observed from the figure below that, locally produced films recorded a total of R59,6 million at the box office in 2019. This is a substantial increase from R50,4 million in 2018 (18% growth)

Figure 1: South Africa's box office gross by year, 2010 – 2019

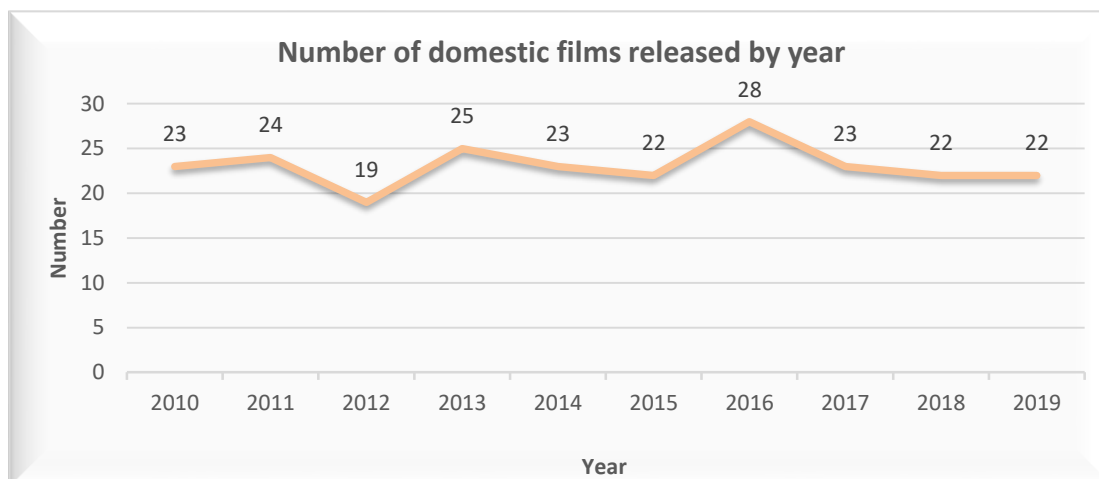


**Source: Filmfinity, NFVF database*

2.2 Number of domestic films released

The number of domestic films released in 2019 remains unchanged at twenty-two (22).

Figure 2: Number of domestic films released, 2010 - 2019

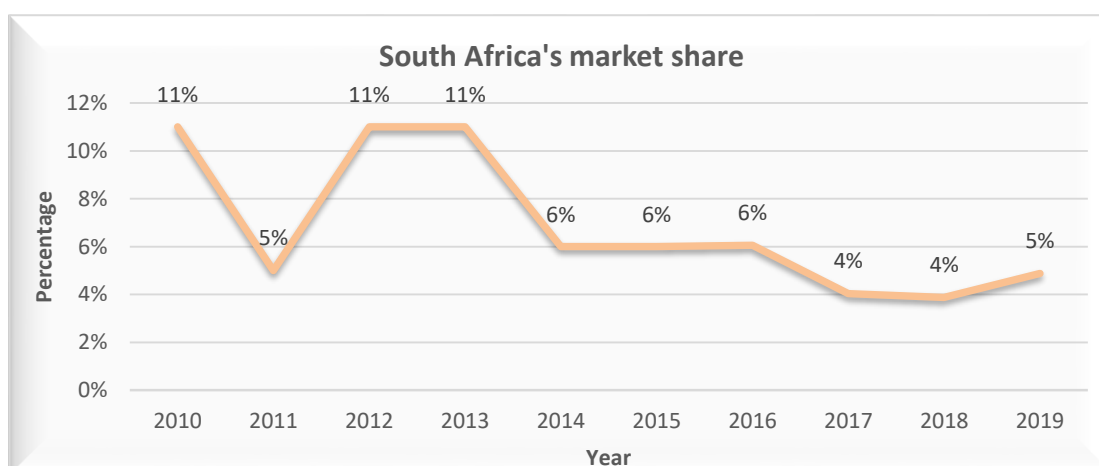


**Source: Filmfinity, NFVF database*

2.3 Market Share of domestic films

The fluctuating patterns of our local films' market share is highlighted in figure 3, below. Locally produced films represent only 5% of the total market share of box office revenue, a slight increase from 4% in 2018.

Figure 3: Market Share of SA produced films, 2010 - 2019

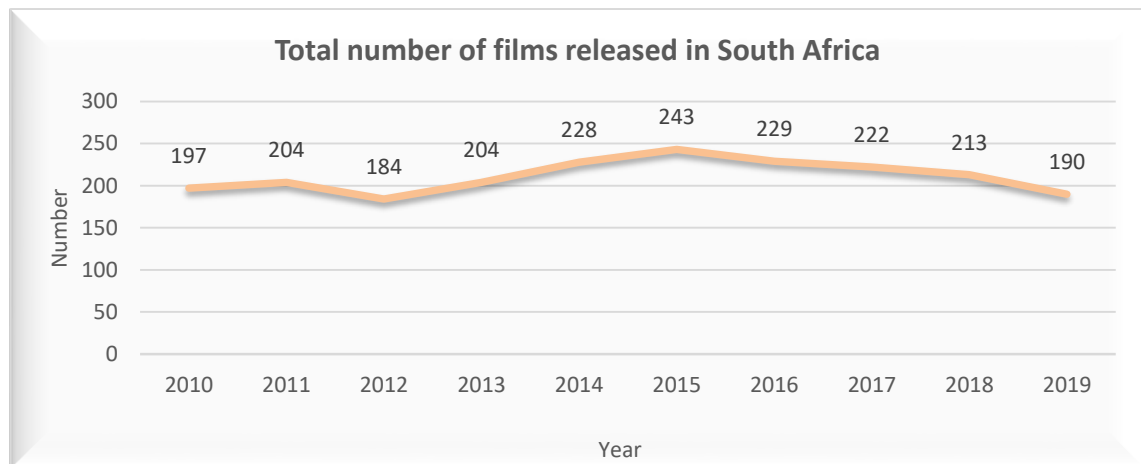


**Source: Filmfinity, NFVF database*

2.4 Total number of films released at Box Office

The total number of films released in South African cinemas dropped by 11% from two hundred and thirteen (213) films released in 2018 to one hundred and ninety (190) films released in 2019.

Figure 4: Total number of films released at Box Office, 2010 - 2019

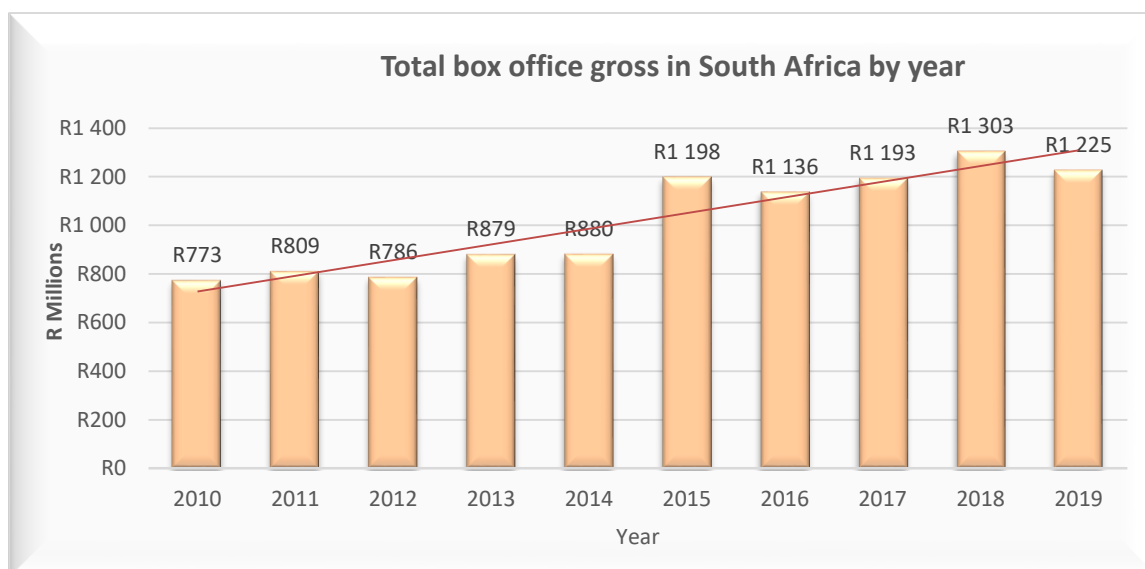


**Source: Filmfinity, NFVF database*

2.5 Total Box Office Gross

The total earnings for the one hundred and ninety (190) films released in 2019 amounted to R1,2 billion. This figure translated to a 6% decline from 2018.

As observed in figure 5 below, the overall box office earnings experienced positive growth trends since 2010 with slight periodic declines depending on the performance of films at the box office.

Figure 5: Total box office gross for films released in South Africa, 2010 - 2019

**Source: Filmfinity, NFVF database*

The forecast of the box office revenues for the next five (5) years (2020-2024) 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 3% CAGR”.

Table 1: South Africa’s Box Office Gross, 2014 - 2023 (R millions)

| Year | Historical Data | | | | | Forecast Data | | | | | CAGR % |
|------------------|-----------------|--------|--------|--------|--------|---------------|--------|--------|--------|--------|-----------|
| | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2019-2024 |
| Gross Box Office | R1 198 | R1 136 | R1 193 | R1 302 | R1 225 | R1 317 | R1 400 | R1 402 | R1 485 | R1 487 | 3% |
| YOY Growth | - | -5% | 5% | 9% | -6% | 8% | 6% | 0% | 6% | 0% | - |

**Source: Filmfinity, NFVF database*

CAGR - Compound Annual Growth Rate

2.6 Indigenous language films

Out of the twenty-two (22) locally produced titles, nine (9) of these were English language films which earned a total of R36,8 million. Eight (8) of the films were in Afrikaans earning R10,6 million in revenue. Other indigenous languages did not perform well in cinemas.

Table 2: Indigenous Language Films

| Indigenous Language (2019) | | | |
|----------------------------|----------------------------|----------------------|--------------------|
| No# | Language | Count of Movie Title | Box Office Gross |
| 1 | English | 9 | R36 842 868 |
| 2 | Afrikaans | 8 | R10 699 272 |
| 3 | Setswana/English | 1 | R6 473 633 |
| 4 | IsiZulu/Setswana/English | 1 | R4 979 930 |
| 5 | IsiZulu | 1 | R361 824 |
| 6 | Afrikaans/IsiZulu/English | 1 | R246 357 |
| 7 | Afrikaans/IsiXhosa/English | 1 | R77 018 |
| Grand Total | | 22 | R59 680 902 |

**Source: NFVF database*

3. TOP PERFORMING THEATRICAL FILMS

3.1 Top 10 – South African produced films

Table 3 below, shows the performance of South African produced films. Some films were well received by audiences and performed relatively well at the box office.

- The highest-grossing domestic film in 2019, was the romantic comedy ***Kandasamy – The Wedding*** (grossing over R19,2 million at the box office). This sequel follows the entertaining ***Keeping up with the Kandasamys*** – South Africa's number one film at the box office in 2017, which made R16,3 million and ran in cinemas for 12 weeks.
- ***Matwetwe***, a low budget film, that was produced with a budget of less than R2 million, made a box office gross of R6,5 million for the twelve (12) weeks on circuit.
- ***Losing Lerato***, the third highest-grossing local film made an impressive R4,9 million. The film was allocated twenty-six (26) screens at its release and ran in cinemas for twenty-three (23) weeks.

Table 3: Top 10 – South African produced films

| Top 10, SA Produced Films, 2019 | | | | | |
|---------------------------------|--------------------------|--------------|----------------|----------------|------------------|
| No# | Movie Title | No# of Weeks | No# of Screens | BOG at Release | Box Office Gross |
| 1 | Kandasamys - The Wedding | 13 | 52 | R5 725 910 | R19 253 079 |
| 2 | Matwetwe | 12 | 17 | R980 762 | R6 473 633 |
| 3 | Losing Lerato | 22 | 26 | R821 224 | R4 979 930 |
| 4 | Zulu Wedding | 12 | 59 | R746 049 | R4 372 428 |
| 5 | Dominee Tienie | 9 | 40 | R578 849 | R4 221 158 |
| 6 | 3 Days to Go | 8 | 31 | R892 936 | R3 479 599 |
| 7 | Fiela Se Kind | 5 | 59 | R823 748 | R3 139 869 |

| | | | | | |
|----|--------------------------|----|----|----------|------------|
| 8 | Blessers* | 16 | 53 | R663 508 | R3 123 763 |
| 9 | Love Lives Here* | 11 | 41 | R631 637 | R2 866 485 |
| 10 | Kings of Mulberry Street | 11 | 30 | R628 478 | R2 406 840 |

**Source: Filmfinity, NFVF*

Gross Box Office = Cumulative gross up to 23 February 2020

** was still being exhibited as at 16 February 2020*

Number of weeks on circuit, #Number of screens at release

3.2 Top 20 – films released in South Africa

The following analysis looks at the top-performing films released in South Africa for the year under review. Table 4, depicts films ranked by the amount earned in 2019.

- The highest-grossing film in 2019 was ***The Lion King***, an Animated movie that surpassed South Africa's box office charts, earnings over R120,8 million in total.
- The second highest-earning film was ***Avengers: End Game***, an Action/Adventure/Sci-fi film earning R104,2 million in box office revenue. The film did exceptionally well, performing better than ***Avengers: Infinity War*** (at R73 million) and exceeded audience expectations.
- ***Jumanji: The Next Level***, was the third highest-grossing Action/Adventure film earning R70,1 million.
- ***Kandasamy: The Wedding***, a locally produced film, made it to the Top 20 list earning in R19,2 million.

Table 4: Top 20, films released in South Africa

| Top 20, Films released in South Africa, 2019 | | | | | | |
|--|--|--------------|----------------|-------------------------|------------------------|-------------------|
| No# | Movie Title | No# of Weeks | No# of Screens | Genre | Box Office Gross (ZAR) | Country of Origin |
| 1 | The Lion King | 20 | 145 | Animation | R120 881 434 | USA |
| 2 | Avengers: End Game | 14 | 202 | Action/Adventure/Sci-fi | R104 238 526 | USA |
| 3 | Jumanji: The Next Level | 9 | 134 | Action/Adventure | R70 875 403 | USA |
| 4 | Frozen II | 10 | 138 | Animation | R56 013 253 | USA |
| 5 | Captain Marvel | 10 | 125 | Action/Adventure/Sci-fi | R49 340 780 | AUS/USA |
| 6 | Aladdin | 16 | 120 | Adventure/Family | R43 472 052 | USA |
| 7 | Fast and Furious: Hobbs & Shaw | 12 | 114 | Action/Adventure | R42 125 371 | USA |
| 8 | Spider-Man: Far from Home | 11 | 123 | Action/Adventure/Sci-fi | R35 278 876 | USA |
| 9 | John Wick: Chapter 3 - Parabellum | 14 | 120 | Action/Thriller | R28 689 446 | USA |
| 10 | How to Train your Dragon: The Hidden World | 12 | 141 | Animation | R26 870 585 | JP/USA |
| 11 | Joker | 14 | 90 | Crime/Drama | R25 700 831 | CAN/USA |
| 12 | Toy Story 4 | 13 | 126 | Animation | R23 645 801 | USA |
| 13 | Star Wars: Rise of Skywalker | 8 | 117 | Action/Adventure/Sci-fi | R22 955 794 | USA |
| 14 | What Men Want | 12 | 83 | Comedy | R22 700 684 | USA |
| 15 | Maleficent: Mistress of Evil | 13 | 122 | Adventure/Family | R19 417 043 | UK/USA |
| 16 | Kandasamys - The Wedding | 13 | 52 | Comedy | R19 253 079 | SA |
| 17 | The Secret Life of Pets 2 | 12 | 122 | Animation | R18 283 733 | FRA/JP/USA |
| 18 | Men in Black: International | 9 | 120 | Action/Adventure/Sci-fi | R17 446 093 | CHN/USA |
| 19 | Angel has Fallen | 17 | 108 | Action/Thriller | R17 287 893 | USA |
| 20 | Shazam! | 7 | 135 | Action/Adventure | R14 752 523 | CAN/USA |

**Source: Filmfinity, NFVF database*

4. MARKET SHARE BY DISTRIBUTOR

4.1 Total market share of films by distributor

Table 5 provides an analysis of films released by local distributors. Seven (7) distribution companies distributed a total of one hundred and ninety (190) films.

- Filmfinity earned the largest share of box office revenue (with gross earnings of R723 million - 59% market share);
- Empire Entertainment (EE) accounted for gross earnings of R245 million, (20% of the total box office gross); and
- United International Pictures (UIP) earned R216 million, (18% of the market share).

Table 5: Total Market Share of films by a distributor

| Total Market Share of Films by Distributor | | | | |
|--|--|----------------------|-----------------------|--------------|
| No# | Distributor | Count of Movie Title | Box Office Gross | Market Share |
| 1 | Filmfinity | 77 | R728 022 419 | 59% |
| 2 | Empire Entertainment | 59 | R245 359 991 | 20% |
| 3 | United International Pictures | 27 | R216 188 039 | 18% |
| 4 | Indigenous Film Distributors | 13 | R20 585 188 | 2% |
| 5 | Blacksheep Films | 9 | R11 315 628 | 1% |
| 6 | Gravel Road Distribution | 4 | R3 265 683 | 0,27% |
| 7 | Nolava International Film Distributors | 1 | R598 000 | 0,05% |
| Grand Total | | 190 | R1 225 334 948 | |

**Source: Filmfinity, NFVF database*

5. BOX OFFICE GROSS BY GENRE

5.1 South African produced films by genre

Table 6 depicts the different genres and their popularity with South African audiences. The popular genres in 2019 for locally produced films were (the top three (3)):

- *Comedy* (grossing R24,8 million) this genre generally has a wide audience appeal in South Africa;
- *Drama* grossed over R14,8 million; and
- *Comedy/Romance* earned R7,2 million.

Table 6: SA produced films by genre

| SA Produced Films by Genre, 2019 | | | | |
|----------------------------------|------------------|----------------------|------------------------|---------------------------|
| No# | Genre | Count of Movie Title | Box Office Gross (ZAR) | Top Performing Title |
| 1 | Comedy | 4 | R24 893 065 | Kandasamys: The Wedding |
| 2 | Drama | 10 | R14 898 180 | Matwetwe |
| 3 | Comedy/Romance | 2 | R7 238 913 | Zulu Wedding |
| 4 | Comedy/Drama | 2 | R6 849 195 | Dominee Tienie |
| 5 | Drama/Thriller | 2 | R5 077 103 | Losing Lerato |
| 6 | Horror/Thriller | 1 | R598 000 | Red Room |
| 7 | Action/Adventure | 1 | R77 018 | Sew the Winter to my Skin |
| Grand Total | | 22 | R59 631 474 | |

**Source: Filmfinity, 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 *Animation* with a total gross of R313,6 million. This was followed by *Action/Adventure/Sci-fi* which earned R253,3 million in revenues, and the *Action/Adventure* genre at R145,4 million in box office revenues.

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

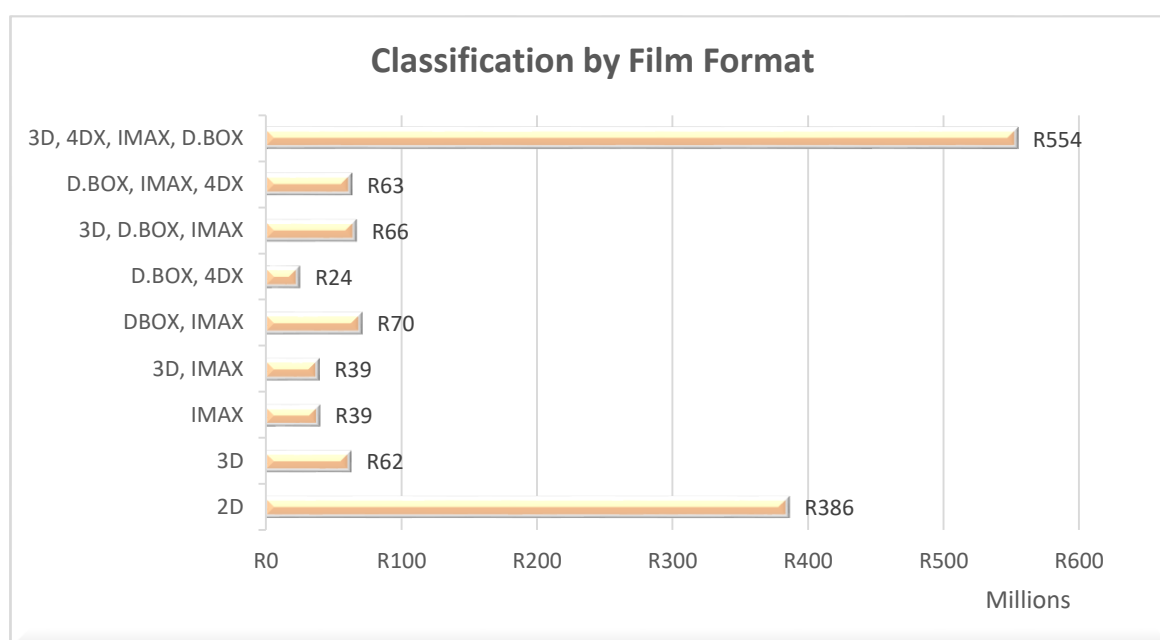
| Top 20 Films released in SA by Genre | | | | | |
|--------------------------------------|-------------------------|----------------------|---|------------------------|-------------------------|
| No# | Genre | Count of Movie Title | | Box Office Gross (ZAR) | Top performing title |
| 1 | Animation | 22 | R | 313 743 198 | The Lion King |
| 2 | Action/Adventure/Sci-fi | 9 | R | 253 306 941 | Avengers: End Game |
| 3 | Action/Adventure | 8 | R | 146 181 811 | Jumanji: The Next Level |
| 4 | Adventure/Family | 7 | R | 88 739 379 | Aladdin |
| 5 | Comedy | 12 | R | 79 729 606 | What Men Want |
| 6 | Comedy/Drama | 18 | R | 64 687 145 | Hustlers |
| 7 | Drama | 41 | R | 49 912 687 | After |
| 8 | Action/Thriller | 4 | R | 49 355 101 | John Wick: Chapter 3 |
| 9 | Crime/Drama | 12 | R | 38 367 385 | Joker |
| 10 | Horror/Thriller | 13 | R | 24 044 944 | Annabelle Comes Home |
| 11 | Comedy/Romance | 10 | R | 24 010 385 | Last Christmas |
| 12 | Action/Drama | 6 | R | 22 826 648 | Gemini Man |
| 13 | Drama/Horror | 9 | R | 18 929 296 | IT: Chapter Two |
| 14 | Action/Crime/Drama | 3 | R | 16 227 294 | 21 Bridges |
| 15 | Drama/Thriller | 5 | R | 14 758 777 | Glass |
| 16 | Musical | 2 | R | 8 000 063 | Rocketman |
| 17 | Thriller | 3 | R | 4 622 226 | Till Death Do Us Part |
| 18 | Biography | 3 | R | 3 056 676 | Pavarotti |
| 19 | Adventure/Sci-fi | 1 | R | 2 734 191 | AD Astra |
| 20 | Action/Comedy | 2 | R | 2 101 195 | Stuber |

**Source: Filmfinity, NFVF database*

6. CLASSIFICATION BY FILM FORMAT

Figure 6, compares box office revenues earned by film format, which provides an indication of how well these formats performed in the South African market. Forty-eight (48) titles were released in different formats (i.e. 3D, 4DX, D. BOX & IMAX) while one hundred and forty-two (142) were a standard format. A combination of 3D/4DX/IMAX/D.BOX claimed R553,8 million in box office revenue. A standard 2D format earned R385,6 million.

Figure 6: Classification by Film Format D)



**Source: Filmfinity, NFVF database*

7. COUNTRY OF ORIGIN

Most of the films released in South Africa in 2019 originated from the USA (i.e. 96 titles, accounting for 66% of the total box office earnings). There were also eleven (11) CAN/USA collaborations released and these shared 6% of the total box office revenue of R73,1 million. South Africa released twenty-two (22) films (which accounted for 5% of the total box office revenue).

Table 8: Country of Origin

| No# | Row Labels | Country of Origin | |
|-----|------------|-------------------|------------------------|
| | | Count of Movie | Box Office Gross (ZAR) |
| 1 | USA | 96 | R806 653 701 |
| 2 | CAN/USA | 11 | R73 196 479 |
| 3 | SA | 21 | R59 385 117 |
| 4 | AUS/USA | 1 | R49 340 780 |
| 5 | UK/USA | 12 | R44 826 522 |
| 6 | CHN/USA | 5 | R43 821 750 |
| 7 | JP/USA | 1 | R26 870 585 |
| 8 | FRA/JP/USA | 1 | R18 283 733 |
| 9 | FRA/USA | 4 | R15 246 352 |
| 10 | SPN/USA | 1 | R14 450 900 |

**Source: Filmfinity, NFVF database*

8. CONCLUSION

In conclusion, the performance of local films at the box office for the year under review has improved. Domestic revenues grew to 18% from R50,4 million in 2018 to an impressive R59,7 million in 2019. On the other hand, the total box office revenues declined by 6%, a drop from R1,3 billion in 2018 to R1,2 billion in 2019.

Kandasamys: The Wedding was the only South African film to gross over R19,2 million. The highest-grossing film of 2019 in Southern Africa was ***The Lion King***, which is a remake of the classic movie and grossing over R120 million.

The locally produced films represent only 5% of the total market share of box office revenue.

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