**SOUTH AFRICA'S (PRELIMINARY)**

**BOX OFFICE REPORT**

**(January to June 2022)**

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# **List of abbreviations and definitions of key terms**

**List of Abbreviations**

**AUS:** Australia

**BLG**: Belgium

**CAN:** Canada

**CHN**: China

**FRA**: France

**GBO:** Gross Box Office

**IND:** India

**JPN:** Japan

**NFVF:** National Film and Video Foundation

**SPN:** Spain

**SA: South Africa**

**SCI-FI:** Science Fiction

**SVOD**: Subscription Video on Demand Services

**UK:** United Kingdom

**USA:** Unites States of America

**Definitions of key terms**

* **Admission:** refers to the total number of tickets sold (cinema attendance).
* **Cinema**: a cinema is a place where people go to watch films for entertainment.
* **Cumulative**: refers to a figure that grows over a period of time.
* **Foreign/International:** refers to films produced outside of South Africa.
* **Domestic/South African produced films:** refers to films made locally 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
* **SVOD:** Subscription Video on Demand services, allow consumers to access an entire catalogue of content for a flat rate, typically paid monthly.
* **Gross Box Office**: is the amount of money raised through ticket sales (revenues).
* **Market Share:** is the percentage of an industry or market sales earned over a specified period. It is calculated by adding domestic gross and dividing it by the total gross box office figure.
* **Movie:** a cinematographic and/or theatrical film.

\*Note: To provide a fair comparison on all theatrical films released, all rankings are based on ticket sales/box office gross.

# **Executive Summary**

The first six months (H1) of 2022 saw a steady increase in the total gross box office in the South African theatrical markets compared to the previous year, 2021. Cinema admissions grew by 65% (from 1,1 to 3,1 million attendance). South Africa's box office revenue amounted to R264,6 million. A total of 86 titles were released at the box office, of which 9 were domestic films. By revenue, these films (domestic films) contributed only 4% (GBO = R10, 441, 459).

The majority (75%) (GBO = R199, 049, 014) of the revenue generated in H1, 2022 came from the Top 10 films. The highest grossing release for the period was ***Top Gun: Maverick*,** with earnings of R60,1 million, or 23% of the total box office. One of the South African-produced films, ***Bones 3: Son of Bones,*** made it to the top performing chart grossing R9,6 million in revenues.

The 5-year trend analysis shows the revenue of all films released in South Africa between 2018 and 2012. There was a steep drop in 2020 and 2021, following the COVID-19 pandemic and the associated lockdowns, however, there is a sign an upward trend in 2022.

1. **Introduction**

This Box Office report outlines the performance of all films released in South Africa between January and June 2022. It provides insights on various indicators including, but not limited to:

* revenue/gross box office (GBO) generated by the films;
* total number of films and their corresponding market share;
* market share by distributors;
* origin of film i.e., international vs domestic films; and
* cinema admissions.

These indicators provide information on the performance of cinema films released in the country and an overview of what drives audience consumption.

1. **Results: box office performance and trends**

Below is a trend analysis of the revenues, admissions, genre, and market share of all films released in South Africa.

* 1. **Cinema admissions in South Africa by month**

The first six months (referred to as H1 2022 hereafter) of 2022 saw a steady increase in South African theatrical markets compared to the previous year, 2021. Cinema admissions grew by 65% (from 1,1 to 3,1 million attendance). The month of April and May had the highest attendance (793,9 and 940,0 thousand, respectively). South Africa sold 3,1 million cinema tickets in total during the first half of 2022.

**Table 1: Cinema admissions in South Africa by month, H1 2021 and H2 2022**

|  |  |  |  |
| --- | --- | --- | --- |
| **Month** | **2021** | **2022** | **% Change** |
| January | 99,738 | 139,901 | 28.71 |
| February | 30,124 | 386,141 | 92.20 |
| March | 271,546 | 423,214 | 35.84 |
| **Quarter 1 Total** | **401,408** | **949,256** | **57.71** |
| April | 188,792 | 793,966 | 76.22 |
| May | 163,259 | 940,004 | 82.63 |
| June | 321,405 | 385,749 | 16.68 |
| **Quarter 2 Total** | **673,456** | **2,119,719** | **68.23** |
| **H1 Total** | **1,074,864** | **3,068,975** | **64.98** |

***Source: Numero, NFVF***

* 1. **Number of films released and revenue (GBO) by month**

The revenues generated for all titles released at South Africa's box office during H1 of 2022 was R264,6 million, 67% more than the R86,9 million earned in H1 2021. Consistent with cinema admissions, the months of April and May earned the highest revenues (R61,6 and R90,4 million respectively).

**Table 2: Number of films released and revenue (GBO) by month, H1 2021 and H2 2022**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Month** | **Number of films (2021)** | **Revenue**  **(2021)** | **Number of films(2022)** | **Revenue (2022)** | **% Change (Revenue)** |
| January | 8 | R7,808,017 | 12 | R10,849,311 | 28.03 |
| February | 9 | R2,519,324 | 12 | R31,270,912 | 91.94 |
| March | 14 | R22,548,965 | 16 | R36,464,172 | 38.16 |
| **Quarter 1 Total** | **31** | **R32,876,306** | **40** | **R78,584,395** | **58.16** |
| April | 18 | R15,708,887 | 21 | R61,603,916 | 74.50 |
| May | 12 | R12,472,248 | 14 | R90,395,902 | 86.20 |
| June | 11 | R25,901,864 | 11 | R34,007,897 | 23.84 |
| **Quarter 2 Total** | **41** | **R54,082,999** | **46** | **R186,007,715** | **70.92** |
| **H1 Total** | **72** | **R86,959,305** | **86** | **R264,592,110** | **67.13** |

**Source: Numero, NFVF**

## 

* 1. **Number of films released and revenue (GBO) in South Africa**

Figure 1 shows the revenues of all films released in South Africa between 2018 and 2022. There was a steep drop in 2020 and 2021, following the COVID-19 pandemic and the associated lockdowns, however, there is a sign of an upward trend in 2022. The year 2018 was the best-performing year throughout the last five-years and generated over R651.8 million, while 2021 was the worst performing year and only generated R87 million.

**Figure 1: Number of films released and revenue (GBO) in SA**

**Source: Numero, NFVF**

* 1. **Market share of number of films released and revenue (GBO)**

In total, 86 films were released in H1 2022, of which 09 were South African produced accounting for 10% of films released. By revenue, these films contributed only 4% (GBO = R10, 441, 459) of the total revenue generated (Figure 2).

**Figure 2: Market share of the number of films released and revenue (GBO)**

**Source: Numero, NFVF**

* 1. **Films produced in South Africa**

There were 09 films produced in South Africa, generating revenues of R10,4 million. The highest earning locally produced film was ***Bones 3: Son of Bones***, grossing over R9,6 million, with cinema attendance of 135,9 thousand.

**Table 3: Films produced in South Africa, H1 2022**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **No#** | **Title** | **Distributor** | **Revenue (GBO)** | **Admissions** | **Genres** |
| 1 | Bones 3: Son of Bones | Filmfinity | R9,558,536 | 135,948 | Comedy |
| 2 | Indemnity | Filmfinity | R394,772 | 5,381 | Thriller |
| 3 | Thando | Indigenous | R331,518 | 5,348 | Drama |
| 4 | The Castle | Independent/Other | R45,498 | 549 | Horror/Thriller |
| 5 | Silent Voice - State Theatre | SA State Theatre | R44,850 | 420 | Action/Thriller |
| 6 | Shaka Zulu | SA State Theatre | R39,075 | 359 | Drama |
| 7 | Sodium Day | Gravel Road | R22,525 | 300 | Comedy/Drama |
| 8 | Sarafina! (RE: 2022) | SA State Theatre | R3,920 | 50 | Drama/Musical |
| 9 | Gaia | Independent/Other | R765 | 9 | Drama/Horror |
|  | **Total** |  | **R10,441,459** | **148,364** |  |

***Source: Numero, NFVF***

**Box office gross = cumulative gross up to 17 July 2022.**

**Films with an asterisk (\*) were still being exhibited on 17 July 2022.**

* 1. **National Film and Video Foundation funded films**

Of the 09 films produced in South Africa in H1 2022, 02 were partially funded by the NFVF. The two films were ***Indemnity (thriller)*** and ***Sodium Day (comedy/drama***). The NFVF also supported 04 of the 09 films released on subscription video on demand (SVOD) services in H1 2022 (Table 8, Appendix).

* 1. **Top performing films**

The majority, 75% (GBO = R199, 049, 014) of the revenue generated in H1, 2022 came from the Top 10 films (refer to Table 4 below). The highest grossing release of the period was ***Top Gun: Maverick,*** with earnings of R60,1 million, or 23% of the total box office. One of the South African-produced films, ***Bones 3: Son of Bones,*** made it to the top performing chart grossing R9,5 million in revenues. Six of the top ten titles were of USA origin.

**Table 4: Top 10 performing films released in South Africa, H1 2022**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No#** | **Movie Title** | **Revenue (GBO)** | **Market Share (% GBO)** | **Country of Origin** |
| 1 | Top Gun: Maverick\* | R60,119,934 | 22.72 | USA |
| 2 | Doctor Strange in the Multiverse of Madness\* | R26,726,031 | 10.10 | USA |
| 3 | Jurassic World: Dominion\* | R20,461,332 | 7.73 | USA |
| 4 | The Batman\* | R20,396,874 | 7.71 | USA |
| 5 | Uncharted | R18,807,735 | 7.11 | USA |
| 6 | Sonic the Hedgehog 2\* | R14,788,609 | 5.59 | JPN/USA |
| 7 | The Lost City\* | R12,116,388 | 4.58 | USA |
| 8 | Bones 3: Son of Bones\* | R9,558,536 | 3.61 | SA |
| 9 | Fantastic Beasts: The Secrets of Dumbledore | R8,155,998 | 3.08 | UK/USA |
| 10 | Turning Red\* | R7,917,577 | 2.99 | CAN/USA |
|  | **Total** | **R199,049,014** | **75.23** |  |

**Source: Numero, NFVF**

**Box office gross = cumulative gross up to 17 July 2022.**

**Films with an asterisk (\*) were still being exhibited on 17 July 2022.**

* 1. **Top performing films by genre**

Table 5 shows the relative popularity of different genres at the box office. Action/Drama was the top-earning genre, grossing R60,6 million in revenue, followed by Action/Adventure/Sci-fi with R48,7 million and Action/Adventure with R27,0 million.

**Table 5: Top 10 performing films by genre, H1 2022**

|  |  |  |  |
| --- | --- | --- | --- |
| **Genre** | **Number of films** | **Revenue (GBO)** | **Top performing title** |
| Action/Drama | 5 | R60,579,300 | Top Gun: Maverick\* |
| Action/Adventure/Sci-fi | 3 | R48,691,120 | Doctor Strange in the Multiverse of Madness\* |
| Action/Adventure | 2 | R26,963,733 | Uncharted |
| Animation | 9 | R24,795,531 | Turning Red\* |
| Action/Crime/Drama | 2 | R20,527,768 | The Batman\* |
| Action/Adventure/Animation | 1 | R14,788,609 | Sonic the Hedgehog 2\* |
| Action/Adventure/Comedy | 2 | R12,874,287 | The Lost City\* |
| Comedy | 2 | R9,797,877 | Bones 3: Son of Bones\* |
| Action/Thriller | 7 | R6,680,380 | Ambulance |
| Biography/Drama/Music | 1 | R5,813,278 | Elvis\* |

**Source: Numero, NFVF**

**Box office gross = cumulative gross up to 17 July 2022.**

**Films with an asterisk (\*) were still being exhibited on 17 July 2022**

* 1. **Number of films and revenue by the distributor**

Filmfinity distributed the majority (26%) of the films released in H1 2022. However, in terms of revenue, United International Pictures (UIP) accounted for 48% (GBO = R127, 787, 793) following Filmfinity at 33% (GBO = R88, 595, 358) and Empire Entertainment at 17% (GBO = R44, 748, 604). The distributor with the smallest amount of the total GBO in 2022 was State Theatre (GBO = R87, 845) (Table 4).

**Table *6*: Market share of the films released in H1, 2022 by distributor**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Distributor** | **Number of films** | **% Films** | **Revenue (GBO)** | **Market Share (%GBO)** |
| UIP | 15 | 17.44 | R127,787,793.00 | 48.30 |
| Filmfinity | 22 | 25.58 | R88,595,358.00 | 33.48 |
| Empire Ent | 19 | 22.09 | R44,748,604.00 | 16.91 |
| Independent/Other | 21 | 24.42 | R2,524,202.00 | 0.95 |
| Indigenous Films | 2 | 2.33 | R560,020.00 | 0.21 |
| Gravel Road | 2 | 2.33 | R162,437.00 | 0.06 |
| Nolava | 2 | 2.33 | R125,851.00 | 0.05 |
| SA State Theatre | 3 | 3.49 | R87,845.00 | 0.03 |
| **Total** | **86** | **100.00** | **R264,592,110.00** | **100.00** |

**Source: Numero, NFVF**

* 1. **Number of films and revenue by origin**

Most of the top-performing films were of USA origin (i.e. 31 films), recording a box office revenue of R197,3 million. JPN/USA (co-production between USA and Japan) had 02 films released, recording R17,3 million in revenues. UK/USA (co-production between the UK and USA) released 04 films accounting for R13,3 million in revenues. South African-produced films earned R10,4 million of the 09 that were released**.**

**Table 7: Country of origin**

|  |  |  |
| --- | --- | --- |
| **Country** | **Number of films** | **Revenue (GBO)** |
| USA | 31 | R197,292,375 |
| JPN/USA | 2 | R17,287,215 |
| UK/USA | 4 | R13,365,238 |
| SA | 9 | R10,441,459 |
| CAN/USA | 1 | R7,917,577 |
| AUS/USA | 1 | R5,813,278 |
| IND | 24 | R1,913,863 |
| CAN/FRA | 1 | R1,605,371 |
| CHN/USA | 1 | R1,604,951 |
| CAN/CHN/USA | 1 | R1,503,757 |
| JPN | 1 | R1,462,155 |
| AUS/CHN/USA | 1 | R1,443,342 |
| UK | 4 | R1,108,414 |
| BLG/FRA | 1 | R790,530 |
| Russia | 1 | R540,572 |
| Greece/USA | 1 | R264,099 |
| SPN | 1 | R175,844 |
| CAN/UK/USA | 1 | R62,070 |
| **Total** | **86** | **R264,592,110** |

***Source: Numero, NFVF***

* 1. **Conclusion**

Analysing revenue by month shows that most revenues were generated from films released in April and May 2022, with May having the most significant share. One of the reasons for the higher revenue seen in May is that the highest-grossing film in H1 2022 (Top Gun: Maverick) was released in May, accounting for 23% of the total revenues. The 5-year trend analysis further shows that there is a sign of an upward trend in 2022. Thus, the South African theatrical market is slowly recovering.

1. **Appendix**

**Table 8: List of South African produced films released on SVOD, H1 2022**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **No#** | **Title** | **Release Date** | **Genre** | **Platform** | **NFVF Funded** |
| 1 | Amandla | 21-Jan | Crime/Drama | Netflix | No |
| 2 | No Love Lost | 17-Feb | Romance | Showmax | No |
| 3 | Last Blue Ride | 01-Apr | Documentary | Showmax | Production |
| 4 | Silverton Siege | 27-Apr | Action/Crime/Drama | Netflix | No |
| 5 | The Umbrella Man | 14-Jun | Comedy Crime | eVOD | Development & Production |
| 6 | Collision | 16-Jun | Crime/Drama/Thriller | Netflix | No |
| 7 | Meet Melusi | 01-Jul | Drama | Showmax | No |
| 8 | You're my Favourite Place | 01-Jul | Drama | eVOD | Post-production |
| 9 | Jewel | 08-Jul | Drama | Netflix | Development |

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