

# SOUTH AFRICA

(Pop: 54.8 million; GDP: \$757.3 billion)

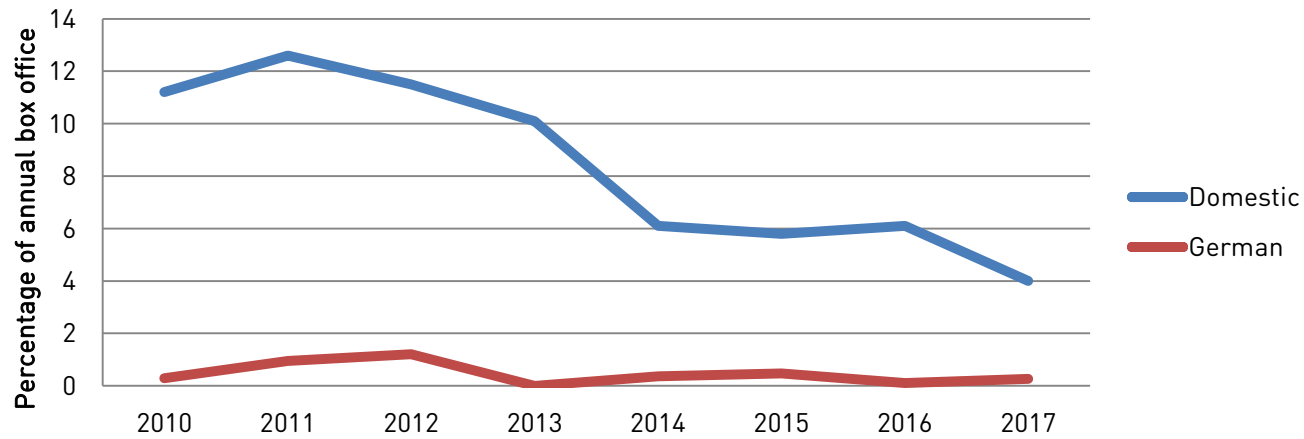
## (1) SOUTH AFRICA: THEATRICAL MARKET OVERVIEW

	2010	2011	2012	2013	2014	2015	2016	2017
Screens	857	750	734	865	757	800+	750	782
Theatrical admissions (millions)	26.0	30.0	22.4	22.4	37.4	36.9	49.7	19.9
Per capita attendance	0.5	0.5	0.4	0.4	0.7	0.6	0.9	0.3
Box office (EUR millions*)	50.3	53.3	43.4	70.1	62.5	71.1	73.4	75.3
Average ticket price (EUR*)	n/a	1.62	1.97	1.77	1.79	2.26	1.5	3.8
Releases	204	202	254	204	228	243	228	222
Domestic releases	23	24	16	25	23	22	28	23
US releases	131	154	143	156	154	210	160	130
European releases**	n/a	33	22	23	26	27	25	34
German releases	2	2	5	0	3	2	1	1
Domestic market share	11.2%	12.6%	11.5%	10.1%	6.1%	5.8%	6.1%	4.0%
German market share	0.29%	0.95%	1.21%	-	0.36%	0.47%	0.10%	0.27%

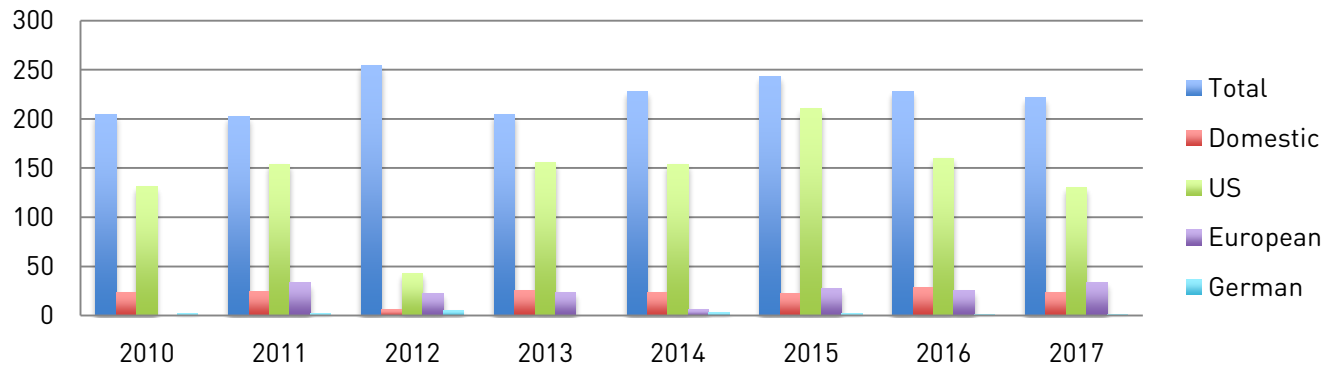
\*EUR equivalents are calculated throughout at the exchange rate for December 31 of the year in question.

\*\*Excluding German majority films

### South Africa: Theatrical Market Shares 2010-17



### South Africa: Theatrical Releases 2010-17



## (2) SOUTH AFRICA: THEATRICAL RELEASES OF GERMAN FILMS, 2010-17

Title	Distributor	Release date	Box office US\$
<b>2010 German films (100% or majority co-productions)</b>			
THE LAST STATION (Ger/Rus/UK)	Ster Kinekor	26.03.10	151,078
DAS WEISSE BAND (Ger/Aut/It/Sp)	UIP (South Africa)	30.07.10	44,774
<b>2010 German minority co-productions</b>			
RESIDENT EVIL: AFTERLIFE (UK/Ger/US)	Sony Pictures South Africa	10.09.10	450,701
MÄN SOM HATAR KVINNOR (Swe/Ger/Nor)	Nu Metro	15.10.10	276,717
NINJA ASSASSIN (US/Ger)	Nu Metro	29.01.10	209,739
FLICKAN SOM LEKTE MED ELDEN (Swe/Fr/Ger)	Nu Metro	05.11.10	148,095
THE GHOST (Fr/Ger/UK)	Nu Metro	21.05.10	65,716
EYES WIDE OPEN (Isr/Fr/Ger)	UIP (South Africa)	12.11.10	30,933
LUFTSLOTTET SOM SPRÄNGDES (Swe/Fr/Ger)	Nu Metro	10.12.10	30,809
SÉRAPHINE (Fr/Bel/Ger)	Ster Kinekor	07.05.10	27,256
WHERE THE WILD THINGS ARE (US/Aus/Ger)	Nu Metro	10.01.10	11,794
ANTICHRIST (Den/Fr/Ger/It/Swe)	UIP (South Africa)	30.07.10	8,201
FAUBOURG 36 (Fr/Ger/Cz)	Ster Kinekor	28.05.10	6,858
<b>2011 German films (100% or majority co-productions)</b>			
THE THREE MUSKETEERS (Ger/Fr/UK/US)	Nu Metro	14.10.11	452,619
KONFERENZ DER TIERE (Ger)	Nu Metro	27.05.11	205,026

### 2011 German minority co-productions

UNKNOWN (US/Ger/UK/Fr)	Nu Metro	08.04.11	974,313
HANNA (US/UK/Ger)	Ster Kinekor	27.05.11	153,303
ANONYMOUS (UK/Ger)	Ster Kinekor	04.11.11	61,001
BLACK BUTTERFLIES (NL/Ger/SA)	Nu Metro	21.10.11	53,640
CHALET GIRL (UK/Ger/Aut)	UIP (South Africa)	22.07.11	19,799
SKOONHEID (SA/Fr/Ger)	Swift 2.0	05.08.11	10,794

### 2012 German films (100% or majority co-productions)

RESIDENT EVIL: RETRIBUTION (Ger/Can)	Ster Kinekor	14.09.12	398,060
CLOUD ATLAS (Ger/US)	Ster Kinekor	02.11.12	296,055
DER GANZ GROSSE TRAUM (Ger)	Ster Kinekor	04.05.12	n/a
GOETHE! (Ger)	Ster Kinekor	22.06.12	n/a
VINCENT WILL MEER (Ger)	Ster Kinekor	13.07.12	n/a

### 2012 German minority co-productions

THE VOW (US/Brz/Fr/Aus/UK/Ger)	Ster Kinekor	11.05.12	939,671
TINKER TAILOR SOLDIER SPY (UK/Fr/Ger)	Nu Metro	09.03.12	102,850
HYSTERIA (UK/Fr/Ger/Lux)	Ster Kinekor	09.11.12	35,297
CARNAGE (Fr/Ger/Pol)	Ster Kinekor	23.03.12	29,237
MELANCHOLIA (Den/Swe/Fr/Ger)	Ster Kinekor	16.03.12	n/a
STREETDANCE 2 (UK/Ger/It)	Ster Kinekor	19.10.12	n/a

### 2013 German minority co-productions

HANSEL & GRETEL: WITCH HUNTERS (US/Ger)	UIP (South Africa)	22.02.13	821,836
THE MORTAL INSTRUMENTS: CITY OF BONES (Can/Ger)	Nu Metro	13.09.13	186,130
RUSH (US/UK/Ger)	Nu Metro	04.10.13	153,681
SONG FOR MARION (UK/Ger)	UIP (South Africa)	28.06.13	149,341
THE BLING RING (US/Fr/Ger/Jap)	Ster Kinekor	15.11.13	27,244
AMOUR (Fr/Ger/Aut)	UIP (South Africa)	19.07.13	n/a

### 2014 German films (100% or majority co-productions)

LOVE, ROSIE (Ger/UK)	Times Media	12.12.14	98,962
TARZAN 3D (Ger)	Times Media	14.11.14	59,780
MR. MORGAN'S LAST LOVE (Ger/Bel/Fr/US)	Ster Kinekor	12.09.14	n/a

### 2014 German minority co-productions

POMPEII (Can/Ger)	Times Media	21.02.14	274,255
THE GRAND BUDAPEST HOTEL (US/Ger)	Times Media	20.03.14	254,863
THE BOOK THIEF (US/Ger)	Nu Metro	24.01.14	229,776
THE MONUMENTS MEN (US/Ger)	Nu Metro	14.02.14	224,388
THIRD PERSON (US/UK/Ger/Bel)	Crystal Brook	11.07.14	72,510
A MOST WANTED MAN (UK/US/Ger)	Ster Kinekor	22.10.14	23,994
NYMPHOMANIAC: VOLUME 1 (Den/Ger/Fr/Swe/Bel)	Cinema Nouveau	08.08.14	n/a
NYMPHOMANIAC: VOLUME 2 (Den/Ger/Fr/Swe/Bel)	Cinema Nouveau	22.08.14	n/a

### 2015 German films (100% or majority co-productions)

DIE BIENE MAJA - DER KINOFILM (Ger/Aus)	Black Sheep Films	18.09.15	357,826
EVERY THING WILL BE FINE (Ger/Can/Swe/Nor)	Black Sheep Films	28.08.15	6,500

### 2015 German minority co-productions

POINT BREAK (US/Ger)	Black Sheep Films	25.12.15	904,629
HITMAN: AGENT 47 (US/Ger)	Ster Kinekor	04.09.15	279,916
BIG GAME (Fin/Ger/UK)	Black Sheep Films	11.07.15	58,534
SHE'S FUNNY THAT WAY (US/Ger)	Crystal Brook	01.05.15	37,830
LIFE (Can/Ger/Aus/US)	Ster Kinekor	09.10.15	4,720

### 2016 German films (100% or majority co-productions)

HEIDI (Ger/Swz)	Times Media	02.09.16	77,595
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### 2016 German minority co-productions

POINT BREAK (US/Ger)	Black Sheep Films	25.12.15	352,158
EDDIE THE EAGLE (UK/US/Ger)	20th Century Fox South Africa	08.04.16	69,917
THE DANISH GIRL (UK/Bel/Ger/Den/US)	UIP (South Africa)	29.01.16	44,500
RACE (Can/Ger/Fr)	Times Media	01.04.16	41,889
A HOLOGRAM FOR THE KING (US/Ger)	Black Sheep Films	17.06.16	27,967
ALONE IN BERLIN (UK/Fr/Ger)	Ster Kinekor	18.11.16	20,196
NOBODY'S DIED LAUGHING (SA/Ger/Swz/US/UK)	Ster Kinekor	29.07.16	19,862
SHEPHERDS AND BUTCHERS (SA/US/Ger)	Times Media	28.10.16	19,623
REMEMBER (Can/Ger)	UIP (South Africa)	12.02.16	12,115

**2017 German films (100% or majority co-productions)**

RESIDENT EVIL: THE FINAL CHAPTER (Ger/Aus/Can)	Sony Pictures South Africa	03.02.17	246,124
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**2017 German minority co-productions**

COLLIDE (UK/Ger)	Ster Kinekor	17.02.17	163,376
THE HUNTER'S PRAYER (US/Sp/Ger)	Ster Kinekor	16.06.17	32,594
A CURE FOR WELLNESS (US/Ger)	20th Century Fox South Africa	17.02.17	23,479
BRIMSTONE (NL/Fr/Ger)	Ster Kinekor	04.08.17	10,984

### (3) SOUTH AFRICA: TOP GERMAN FILMS (THEATRICAL), 2010-17

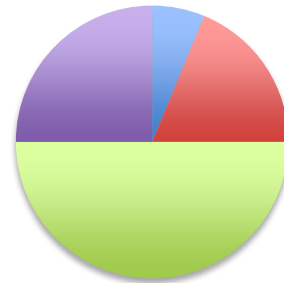
	Admissions	Box office (EUR)
THE THREE MUSKETEERS (2011)	215,532	349,422
DIE BIENE MAJA - DER KINOFILM (2015)	145,664	329,200
RESIDENT EVIL: RETRIBUTION (2012)	153,100	301,729
CLOUD ATLAS (2012)	113,867	224,410
KONFERENZ DER TIERE (2011)	97,431	158,280
THE LAST STATION (2010)	69,596	112,745
TARZAN 3D (2014)	61,568	124,086
RESIDENT EVIL: THE FINAL CHAPTER (2017)	54,428	206,827
HEIDI (2016)	49,267	73,900
LOVE, ROSIE (2014)	45,691	81,787



**(4) SOUTH AFRICA: DISTRIBUTORS OF GERMAN FILMS, 2010-17**

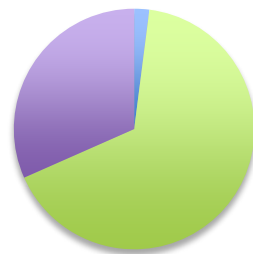
	2010	2011	2012	2013	2014	2015	2016	2017	Total
Ster Kinekor	1	-	5	-	1	-	-	-	7
Nu Metro	-	2	-	-	-	-	1	-	3
Black Sheep Films	-	-	-	-	-	2	-	-	2
Times Media	-	-	-	-	2	-	-	-	2
Sony Pictures South Africa	-	-	-	-	-	-	-	1	1
UIP (South Africa)	1	-	-	-	-	-	-	-	1

### South Africa: German Releases by Genre, 2010-17



- Arthouse
- German Stories
- English Language
- Animation & Children's Films
- Local Interest

### South Africa: German Films Box Office by Genre, 2010-17



- Arthouse
- German Stories
- English Language
- Animation & Children's Films
- Local Interest

## (6) GERMAN FILMS IN SOUTH AFRICA, 2010-17: AN ANALYSIS

Two things need to be said about the theatrical market in South Africa by way of preliminary qualification. One, the data in Section 2 of this report refers to 'Southern Africa' rather than just the Republic of South Africa, much as US box office figures include those for Canada. It is, however, very unlikely that ticket sales in Botswana (six screens) or Namibia (also six screens) will make any substantial difference to the conclusions for German films. Secondly, the data for South Africa as a whole is incomplete and in certain respects inconsistent, so all conclusions are tentative. Also the market share and genre graphics in Section (1) has been omitted.

With that said, the market seems to be very much US-dominated and the second of the two genre charts above - the one based on box office - tells pretty much the whole story as far as German films are concerned: English-language films account for 68.9% of the box office; animation and children's films for 29.3%; and the single arthouse title, *DAS WEISSE BAND*, for the remaining 1.8%. No figures are available for the week of German films shown by major distributor Ster Kinekor in 2012.

In general economic terms, South Africa has the continent's highest level of economic development; a solid and growing middle class; and, in the cities, a cinematic infrastructure not dissimilar to, for instance, leading Latin American markets. But the distribution market is extremely limited, with a narrow range of titles and little to offer to European films. There are only between 750 and 800 screens (figures vary depending on the source) serving a population of 54 million (one for about every 70,000 inhabitants) which makes it clear that cinema of any kind is available only in the major cities (Cape Town, Durban, Johannesburg and Pretoria). What is more, while the arthouse theatrical market is developing in other territories, it has a long way to go in South Africa despite the emergence of a number of specialist distributors. To find a genuine arthouse movie making a theatrical mark in South Africa, we have to go back to 2010, when *DAS WEISSE BAND* took under EUR 50,000 at the local box office. No German films at all were released in South Africa in 2013 - the only territory among all those surveyed to go a full 12 months without opening one.

Returns are likewise low, although improving. But with average ticket prices of two Euros or less and annual box office of between EUR 43 and 75 million in the period surveyed (during which it rose by almost 50%), it is not a market that offers much to purveyors of specialist product (although converting Rands into Euros makes the figures look worse than they really are). Admissions appear to fluctuate wildly, between 50 million and 20 million, but this is more due to conflicting sources than anything else.

A recent survey by Nielsen South Africa found that 63% of South Africans watched a VOD service regularly and 79% did so at least once a week. The good news is these services reach 43 million South Africans a week. The bad news is that the content made available currently mirrors the theatrical market by containing almost no European or arthouse titles. It is difficult to see how this will change, at any rate in the short term, and South Africa remains of limited interest to German film exporters.

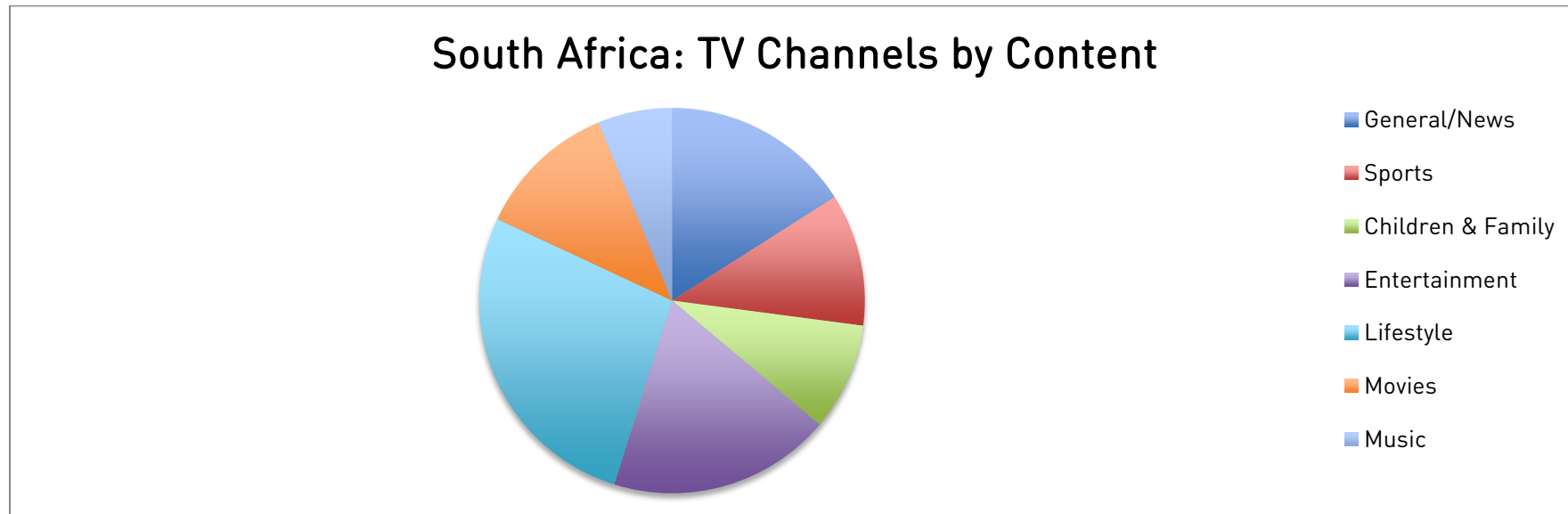
**What works in South Africa?** Only films which were made or look like they were made in North America.

**What doesn't work in South Africa?** Almost everything else, especially arthouse.

**What else might appeal?** Exposure of European films seems limited to the European Film Weeks which play most years in Johannesburg, Pretoria and Cape Town.

## (7) GERMAN FILMS IN SOUTH AFRICA, 2010-17: TV AND VOD

South Africa has a highly-developed pay-TV sector divided up along familiar lines, as indicated in the chart below. Given the aspiration of many channels to celebrate South African national identity, the Lifestyle category is especially large, all the more so since the many religious channels are listed under that heading as well. Movies are also well represented, but with the emphasis on blockbusters, action and comedy.



Leading South African cable and satellite provider M-Net divides its movie channels into nine groups labelled Premier, Comedy, Family, Action, Action +, Romance, Showcase, Stars and Zone. American movies make up the overwhelming majority (89%).

## South Africa: Films on M-Net by Country of Origin



For details of on-line VOD platforms available in South Africa, see the appropriate appendix.

Of the two major distributors handling German films, only **Ster Kinekor** currently has plans for a VOD platform.

### (8) SOUTH AFRICA: SOURCES AND ACKNOWLEDGMENTS

CIA World Factbook, XE.com, European Audiovisual Observatory, NFVF (National Film and Television Foundation, Box Office Report), Rentrak, Box Office Mojo, MNet.dstv.com, businesstech, PriceWaterhouseCooper, Nielsen South Africa.