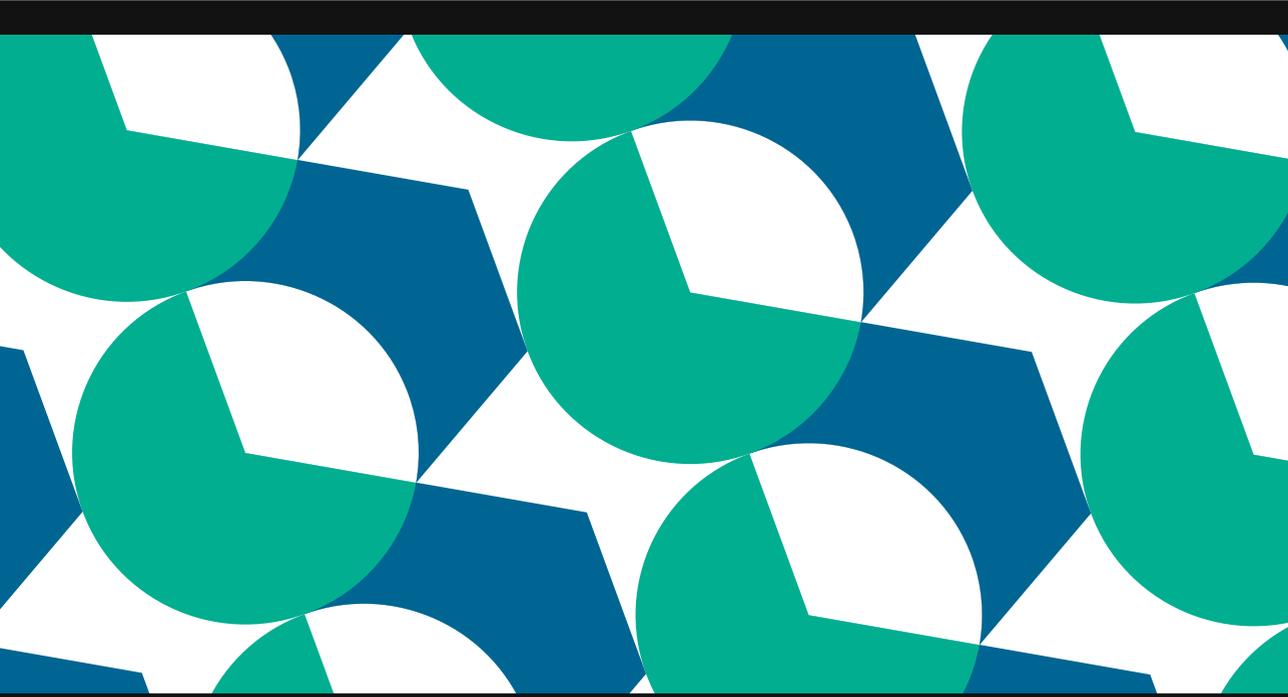


UNIFRANCE

FRENCH
CINEMA
WORLDWIDE



20th RENDEZ-VOUS WITH

FRENCH CINEMA

PARIS / JANUARY 18 - 22 2018

**PERFORMANCE
OF FRENCH FILMS
IN FOREIGN MARKETS
IN 2017**

THE PERFORMANCE OF FRENCH FILMS IN FOREIGN MARKETS IN 2017

80.5
MILLION
ADMISSIONS*
(UP 98% COMPARED
TO 2016)

Note: in France, French films drew
78.2 million admissions in 2017**

468
MILLION
EUROS
IN RECEIPTS*
(UP 82% COMPARED
TO 2016)

2017, A YEAR OF RECOVERY FOR FRENCH CINEMA ABROAD

- ▶ **More admissions abroad than in France for the 4th time in 6 years**
- ▶ **60.7 million admissions* (76% of the total)** for majority-French productions (up 124% compared to 2016)
- ▶ **38 million admissions* (47% of the total)** for French-language films (up 42% compared to 2016)
- ▶ **642 French films on release*** in foreign movie theaters (up 5% compared to 2016)
- ▶ **7 French films sold more than 1 million tickets abroad***** (compared to 6 in 2016)
- ▶ **76 French films drew more than 100,000 admissions abroad*****
- ▶ **China became the leading market for French films in 2017**, ahead of the United States and Russia

*Non-exhaustive data already compiled by UniFrance. The definitive results, available in September, will necessarily be higher
Provisional data estimated by the CNC / *Provisional data estimated by UniFrance

A YEAR OF FRENCH CINEMA ON THE INTERNATIONAL MARKETPLACE

After a sluggish year in 2016 with fewer than 50 million admissions, the performance of French films in foreign theaters soared in 2017 to reach 80.5 million admissions, for some 468 million euros in revenue. For the 4th time in 6 years, French films generated more ticket sales in international theaters than on home soil.

As was the case in 2014 and 2015, 2017 was dominated by one EuropaCorp English-language production, *Valerian and the City of a Thousand Planets*, which single-handedly accounted for 40% of spectators for French films during the period. As a result, the number of admissions for French-language films, while rising 42%, only accounted for 47% of overall admissions for French cinema for the year, compared to 66% in the previous year. This is, however, in line with the average over the past decade (44%).

Majority-French productions also returned to more normal levels, with 60.7 million ticket sales in 2017, surging 124% compared to 2016, and accounting for 76% of overall admissions for the year (compared to 67% the previous year). This is slightly below the 10-year average of 79.6%.

Although 2017 was notable for the performance of Luc Besson's film, many majority-French financed productions also enjoyed success

abroad, such as the 4.8 million admissions for the comedy drama *Two Is a Family*, 2nd in the annual ranking, followed by the thriller *Overdrive* which completed the podium, accumulating nearly two million ticket sales. The rest of the top 10 once again underlines the diversity of French production, with the success of the animated movie *The Jungle Bunch*, the 4th best-selling French film of the year, the comedies *R.A.I.D. Special Unit*, *Christmas & Co* and *Radin!*, and the dramas *Elle* and *Miss Sloane*. Another indicator of the diversity of the offer of French cinema: 76 French films cumulated more than 100,000 foreign ticket sales last year, compared to an average of 60 per year since 2000. Despite this, atomization remains limited, with **64% of admissions concentrated on the five leading films in the annual ranking**, significantly higher than the 10-year average of 59%.

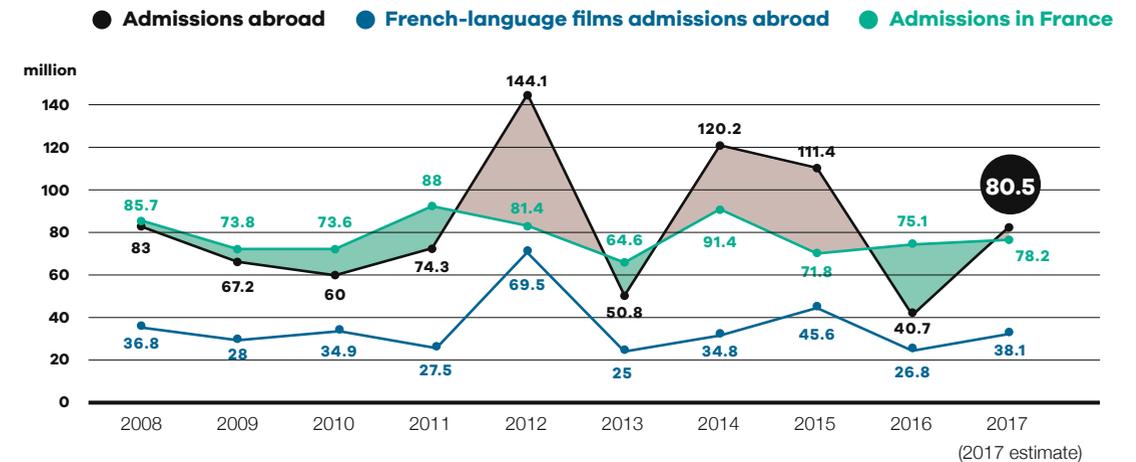
Last year was notable for the recovery of French cinema abroad, and 2018 should see the strong

performance in foreign theaters continue. Among upcoming films are some highly-anticipated comedies, with the Dany Boon-directed *La Ch'tite Famille* and *L'Extraordinaire Voyage du fakir* by Ken Scott. After the success of *Asterix: The Mansions of the Gods*, a new animation adventure is set to hit screens: *Astérix – Le Secret de la potion magique*, written by Alexandre Astier and animated by Louis Clichy. Action movies are also expected to do well, with two new EuropaCorp productions: *Taxi 5* and *Anna*. Other titles to watch out for include the third and final instalment in the hit saga *Belle & Sebastian* by Clovis Cornillac, the new films from Jacques Audiard (*The Sisters Brothers*) and Abdellatif Kechiche (*Mektoub, My Love: Canto Uno*), and the first feature film by Xavier Legrand, *Custody*, which won a string of awards at the Venice Film Festival.

★ EuropaCorp, Gaumont and SND are at the top of the 2017 sales companies ranking in terms of admissions obtained by their films in foreign markets. Follow the independent sales agent Wild Bunch, Kinology, Memento Films International and Playtime.

★ EuropaCorp is at the top of the ranking of producers whose films attracted the most admissions abroad, thanks to *Valerian*. It is followed by Quad/Main Journey (*Leap!*) and Vendôme Production (*Two Is a Family*).

EVOLUTION OF FRENCH FILMS ADMISSIONS IN FRANCE AND ABROAD OVER THE PAST 10 YEARS



THE YEAR'S BIGGEST HITS AT THE INTERNATIONAL BOX OFFICE

★ TOP 10 MAJORITY-FRENCH PRODUCTIONS ABROAD IN 2017

Film (International sales agent / Producer)	Admissions 2017* (million)	Cumulative admissions to 31/12/2017*	Receipts 2017* (M€)	Cumulative receipts to 31/12/2017*
1 <i>Valerian and the City of a Thousand Planets</i> (EuropaCorp / EuropaCorp)	30.6	-	170.9	-
2 <i>Two Is a Family</i> (SND / Vendôme Production)	4.8	5.1	31.5	33.6
3 <i>Overdrive</i> (Kinology / Kinology, Overdrive Productions)	1.9	-	9.2	-
4 <i>The Jungle Bunch</i> (SND / TAT productions)	1.2	-	5.3	-
5 <i>Elle</i> (SBS International / SBS Productions)	0.9	1.6	7.3	11.6
6 <i>Renegades</i> (EuropaCorp / EuropaCorp)	0.8	-	3.3	-
7 <i>Miss Sloane</i> (EuropaCorp / EuropaCorp)	0.7	1.2	5	8.6
8 <i>R.A.I.D. Special Unit</i> (Pathé / Pathé, Les Productions du Ch'Timi)	0.6	-	4.2	-
9 <i>Christmas & Co</i> (Gaumont / Légende)	0.6	-	2.7	-
10 <i>Radin!</i> (TF1 Studio / Jerico)	0.5	0.9	2.9	5.7

(*Non-definitive figures)



Despite doing less well than expected, *Valerian and the City of a Thousand Planets* was the French production that sold the most tickets in international theaters in 2017, totaling 30.6 million admissions in close to 80 territories. More than one-third of the total came from China, where the film sold 11.6 million tickets – the best performance ever by a French movie in this country. The film also garnered 4.7 million admissions in the US & English-speaking Canada, 3.2 million in Russia, 1.75 million in Mexico, and 1.05 million in Germany.



The sensation of 2017 was *Two Is a Family*. The comedy drama broke the five-million admissions barrier abroad, driven by its performance in Italy, where it drew 1.1 million admissions, putting it in the overall top-25 hits of 2017 there. The film also did well elsewhere in Europe: 926,000 admissions in Germany, 521,000 in Spain, and 250,000 in Poland.



With 1.9 million admissions in international theaters, an action movie is 3rd on the podium in 2017. *Overdrive* was the 2nd biggest-selling French movie of the year in Mexico, where it sold 286,000 tickets. It attracted more than 200,000 admissions in Russia and Italy, while the appetite in Asian markets for high-adrenaline films drove it to 171,000 admissions in Malaysia and 132,000 in Japan.

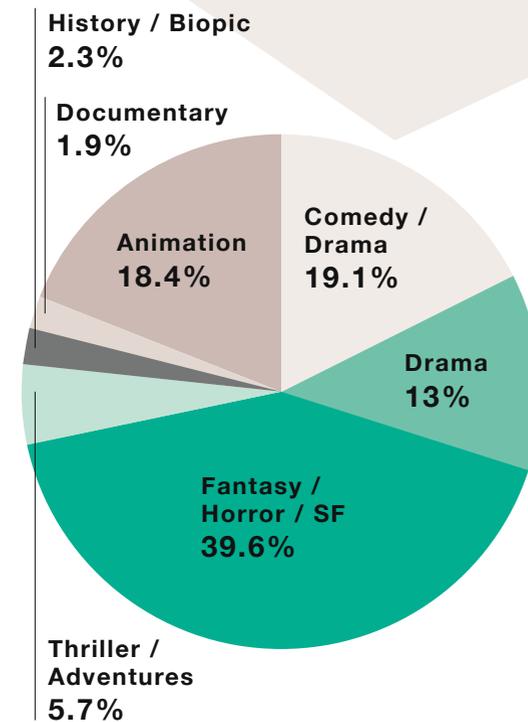


Another film that drew more than one million foreign admissions is *The Jungle Bunch*, which performed well in the United Kingdom, where it was on release for 16 weeks, garnering 225,000 admissions, the 2nd highest score in 2017 for a French film after *Valerian*. The animation has been released over 30 territories, and did even better in Russia, where it sold 281,000 tickets.



For the 2nd year running, *Elle* features in the top 10. The thriller's international roll-out began mid-2016, and continued throughout 2017, when it generated an additional 984,000 admissions taking its worldwide total to an impressive 1.6 million admissions. The stand-out figures last year were in Italy (176,000 admissions), the US & English-speaking Canada (a further 159,000 admissions, for a total of 270,000), and Germany (150,000).

BREAKDOWN OF FRENCH FILMS ADMISSIONS ABROAD IN 2017 BY GENRE



ANIMATION

In addition to *The Jungle Bunch*, *Leap!* was another flag-bearer for French animation in foreign markets in 2017. With 14 million admissions worldwide, the Franco-Canadian coproduction became the top-grossing French animation in the US and English-speaking Canada of all time (\$22M). Featuring in the top five in some 20 countries in the week of its release, *Leap!* also crossed the million-admissions mark in China, Spain, Russia and Mexico.



COMEDY

Dany Boon once again confirmed his role as ambassador for French comedy abroad. In 2017, he top-lined *R.A.I.D. Special Unit* and *Radin!*, both productions garnering more than 500,000 admissions abroad. Other strong comedies performances last year included *Christmas & Co* (600,000 admissions), but also *With Open Arms*, *Alibi.com* and *C'est la vie!*, all of which totaled more than 400,000 admissions. Meanwhile, *The African Doctor* drew 206,000 admissions in Germany alone.



DOCUMENTARY

Last year, the stand-out territory for French documentaries was the US & English-speaking Canada. Driven notably by the honorary Oscar awarded to Agnès Varda, *Faces Places* was a slow-burn hit, having so far sold more than 72,000 tickets, making it the veteran director's biggest hit stateside. Meanwhile, *I Am Not Your Negro* took more than \$7 million in receipts (823,000 admissions) on a combination of up to 320 screens, becoming the 5th highest grossing French documentary in the territory!



DRAMA

While *Elle* remained the runaway drama success of the year, three other French titles enjoyed outstanding performances, each cumulating more than 500,000 admissions over the period. The English-language production *Miss Sloane* captured hearts in Spain (174,000 admissions), while *Back to Burgundy* drew 190,000 admissions in Germany, and *Frantz* continued its international roll-out, racking up 100,000 admissions in Germany, Spain, US & English-speaking Canada and Italy.

BREAKDOWN OF FRENCH FILMS ADMISSIONS ABROAD IN 2017 BY REGION

★ TOP 5 TERRITORIES FOR ADMISSIONS TO FRENCH FILMS IN 2017

Territory	Admissions 2017*	Receipts 2017* (in €)
1 China	13 390 000 ↗ +816%	64 447 000
2 US & English-speaking Canada	10 052 000 ↗ +80%	74 757 000
3 Russia	6 330 000 ↗ +306%	23 544 000
4 Mexico	5 160 000 ↗ +121%	12 179 000
5 Germany	4 956 000 ↗ +43%	41 400 000

(*Non-definitive figures)

BOX OFFICE HIGHLIGHTS

Raw drew more admissions in Mexico (231,000) than in France (153,000).

The Insult (119,000 admissions) became the second-biggest French hit of all time in Lebanon.

The Young Karl Marx (182,000) and **Happy End** (92,000) both recorded more admissions in Germany than in France (175,000 and 85,000 respectively).

Dalida was 3rd at the box office in Quebec on its first week on release.

Aurora achieved the second-best per-screen average in Spain on the week of its release (after *Spider-Man: Homecoming*).

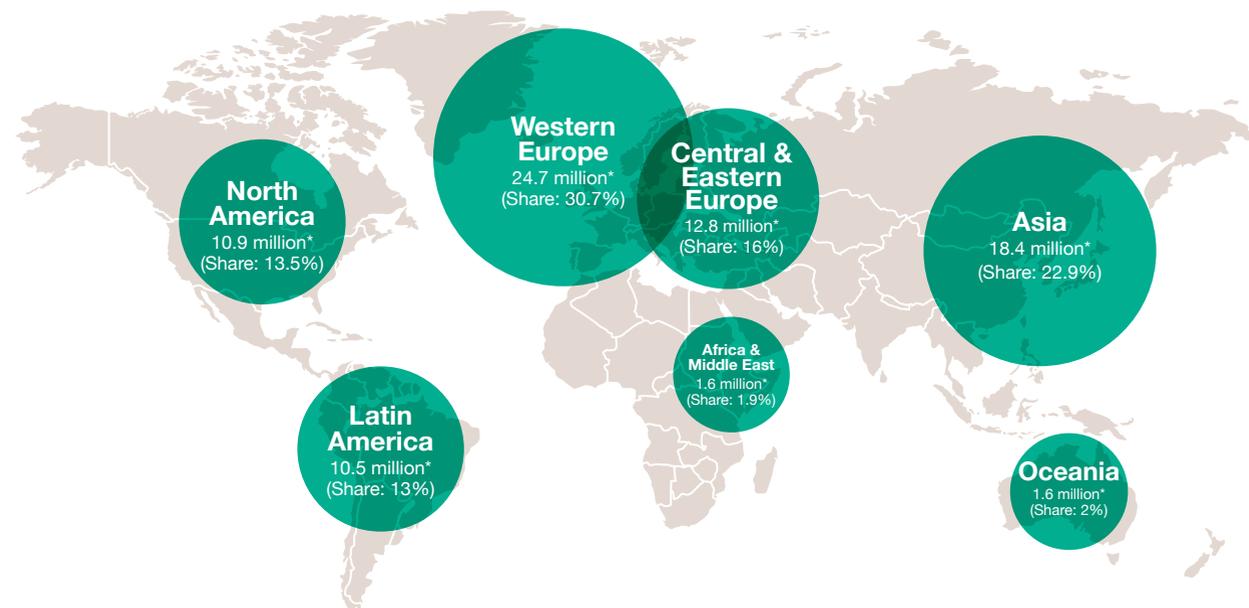
Rosalie Blum (149,000) and **Things to Come** (63,000 admissions) were both on release on Australian screens for more than 13 weeks.

Valerian and the City of a Thousand Planets was in the top 3 in 30 territories on its first week of release.

Lost in Paris was released in South Korea on as many screens as in France (80).

Personal Shopper is the 5th most widely-released French film abroad in 2017 (41 territories).

Mr. Stein Goes Online was the biggest French hit of the year in Colombia (227,000 admissions), ahead of *Valerian* (225,000).



For the 2nd year running, **Western Europe** remained the leading export region for French films. With a total of 24.7 million ticket sales, it accounted for nearly one-third of tickets sold for French films over the period. Germany was the only territory of the region to make the top five (compared to four last year), with 4.9 million total admissions, including 1 million for *Valerian and the City of a Thousand Planets*, and more than 900,000 for *Two Is a Family*. Other notably strong performances included *Leap!* in Spain and *Two Is a Family* in Italy, which both sold more than one million tickets locally.

Driven mainly by *Valerian*, which cornered 75% of total admissions to French films in the region, **admissions in Asia increased five-fold, taking the region to 2nd position for French cinema exports in 2017**. With 13.4 million admissions (including 11 million for *Valerian*), China became the leading market in terms of audience for French films in 2017, ahead of the United States. There were also more than one million ticket sales in South Korea and Japan for French films over the period.

It was a good year for **Central and Eastern Europe** which took the 3rd place of the ranking by accounting for 16% of total admissions to French films abroad in 2017, its best performance since 2007 (17.3%). As with other regions, *Valerian* and *Leap!* dominated the annual rankings and accounted for more than 50% of total admissions in the region. The strong performances of these films in Russia (3.2 and 1.2 million admissions respectively) saw that territory move up to 3rd place on the podium among export markets for French cinema in 2017.

Despite growth in admissions of 66%, **North America slipped to 4th position among export regions for French film in 2017**. The disappointing results for *Valerian* in the United States and English-speaking Canada (4.7 million admissions) saw the territory lose its leading position in 2017, in favor of China. As for Quebec, it was another sluggish year with 800,000 total admissions, including 184,000 for *Valerian* and 104,000 for *Two Is a Family*.

Side by side with North America, **Latin America ranks 5th** with 10.5 million total ticket sales and a 13% market share (the second-best market share for the region in more than a decade). With more than five million ticket sales, Mexico was the leading country in the region and moved up to 4th place among export territories in 2017, mainly thanks to the 1.7 million admissions for *Valerian*, the only French film to cross the symbolic one-million mark in the region.

In **Oceania**, the top-performing French film of the year was for once a French-language picture, *Leap!* (450,000 admissions), which outstripped *Valerian* (260,000). Another pleasant surprise was the performance of the comedy *Rosalie Blum*, which ranked 3rd with almost 150,000 admissions in Australian theaters.

(*Non-definitive figures)

EVERYTHING YOU ALWAYS WANTED TO KNOW ABOUT FRENCH CINEMA ABROAD

1. CAN A FRENCH-LANGUAGE FILM SELL WELL ABROAD?

YES.

Over the past 5 years, French-language films have sold an annual average of 34 million ticket sales abroad per year. In 2017, admissions to French-language films were up by 42% compared to 2016, but they only accounted for 47% of all French film admissions over the period.

EVOLUTION OF FRENCH-LANGUAGE FILMS ADMISSIONS ABROAD OVER THE PAST 5 YEARS (MILLION)

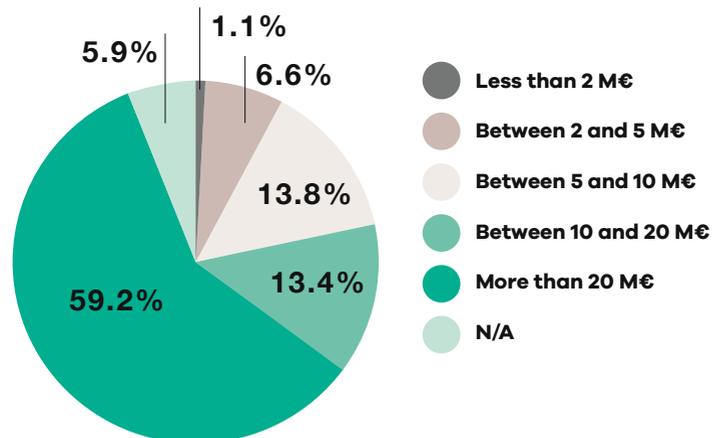


2. ARE THE MOST WIDELY-DISTRIBUTED FILMS ABROAD THE MOST EXPENSIVE ONES?

BIG-BUDGET FILMS OFTEN TOP THE RANKINGS OF FRENCH FILMS ABROAD

In 2017, *Valerian*, the most expensive film in the history of French cinema, was in top spot. But films with more modest budgets may also enjoy wide distribution. For example, *Raw* (410,000 admissions in 2017) was released in 15 territories, and *Things To Come* (250,000 admissions) in 20 territories.

BREAKDOWN OF FRENCH FILMS ADMISSIONS ABROAD IN 2017 BY BUDGET

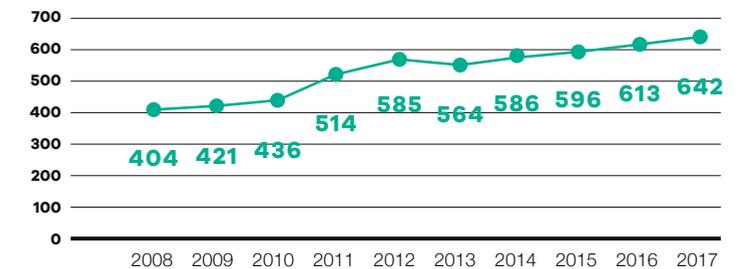


3. HAVE FRENCH FILMS BEEN SELLING BETTER OVER THE PAST 10 YEARS?

FRANCE PRODUCES NEARLY 300 FILMS PER YEAR.

As a result, there are more and more films on sale. Nowadays, the lifecycle of films is increasingly short, and the number of releases ever-growing. French films are following this trend, which means more French films have to be offered on foreign markets to have a continual presence.

EVOLUTION OF THE NUMBER OF FRENCH FILMS RELEASED IN FOREIGN MARKETS OVER THE PAST 10 YEARS

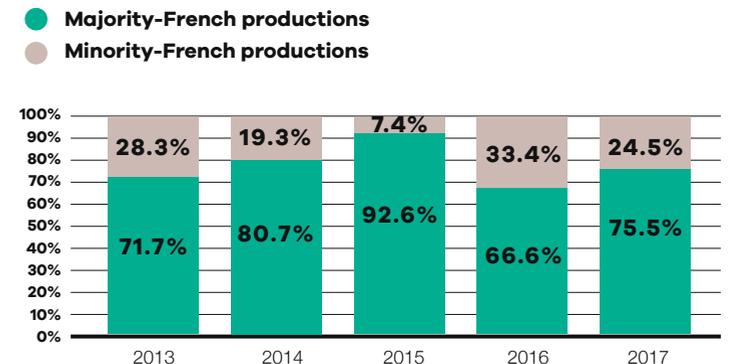


4. DO COPRODUCTIONS EXPORT BETTER THAN OTHER FILMS?

One of the strengths of French production is its capacity to work with films initiated in other countries and to attract international coproducers.

A QUARTER OF ALL ADMISSIONS FOR FRENCH FILMS ABROAD IN 2017 CAME FROM COPRODUCTIONS, which helps to reinforce the diversity of the films proposed.

EVOLUTION OF FRENCH FILMS ADMISSIONS ABROAD OVER THE PAST 5 YEARS ACCORDING TO THE FRENCH SHARE OF FINANCING





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