

21th RENDEZ-VOUS WITH

FRENCH CINEMA

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**PERFORMANCE
OF FRENCH FILMS
IN FOREIGN MARKETS
IN 2018**

THE PERFORMANCE OF FRENCH FILMS IN FOREIGN MARKETS IN 2018

**40
MILLION
ADMISSIONS***
(down 52% on 2017)

Note: In France, French films sold
77 million tickets in 2018**

**237
MILLION
EUROS
IN RECEIPTS***
(down 51% on 2017)

OVERALL, FRENCH CINEMA TICKET SALES FELL IN 2018 ON THE INTERNATIONAL MARKETPLACE

- ▶ **26 million admissions* (65.7% of the total)** for majority-French productions
(down 58.4% on 2017)
- ▶ **24.6 million admissions* (62.2% of the total)** for French-language films
(down 38.2% on 2017)
- ▶ **665 French films on release*** in foreign movie theaters
(down 3.8% on 2017)
- ▶ **6 French films sold more than 1 million tickets in foreign markets*****
(compared to 7 in 2017)
- ▶ **78 French films sold more than 100,000 tickets in foreign markets*****
- ▶ **Results back to the level of those of 2016**
- ▶ **Italy leading territory in terms of ticket sales for French films in 2018**,
ahead of the United States & English-speaking Canada
and Belgium & Luxembourg

*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

In 2018, French films attracted 40 million admissions and generated 237 million euros in box-office receipts. After an upturn in 2017 when international admissions rose to 82.5 million, ticket sales for French cinema in foreign theaters fell by 52% and went back to the level of those of 2016. For the second time in five years, French films attracted fewer admissions abroad than in France.

The primary reason for this sharp drop is the absence of any major hits like *Valerian and the City of a Thousand Planets* (30.4 million admissions) or *Leap!* (12.7 million admissions), the two biggest sensations of the previous year. If figures for those two movies are removed, the total for 2017 comes down to 39.4 million admissions, roughly equivalent to that of 2018. The number of films on release dropped to 665, from 691 in 2017. Six French films (including three majority-French coproductions) drew more than 1 million admissions, one fewer than the previous year, and 78 films accumulated more than 100,000 admissions, compared to 82 in 2017.

The five biggest French hits in 2018 only accounted for 27.1% of overall admissions for French cinema in foreign theaters, compared to 64.8% in 2017. This fragmentation of admissions is due to the absence of any flagship titles, but allowed greater visibility for a wider range of films. Majority-French productions only accounted for 65.7% of the annual total, while minority-French

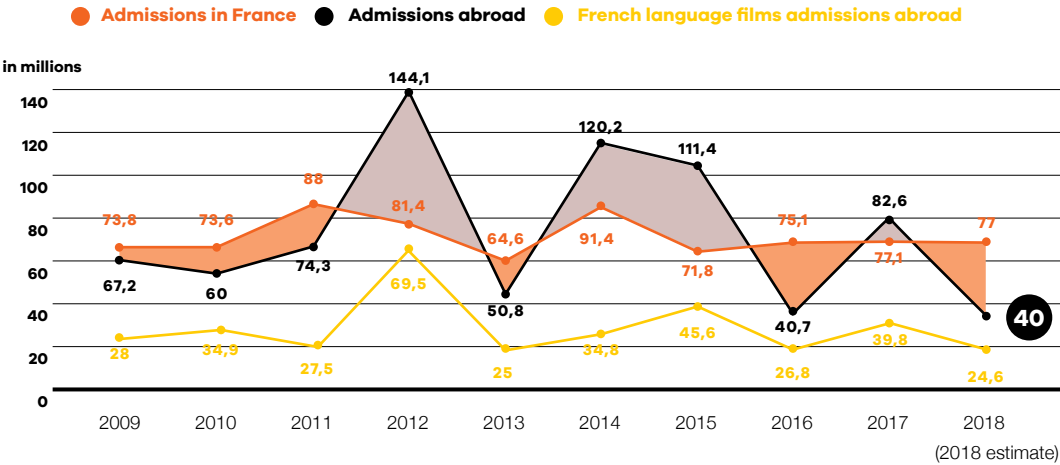
productions accounted for more than one-third of total admissions for the year – for the third time since 2011. French-language films sold 24.6 million tickets, the worst performance since 2009. Nonetheless, they accounted for 62.2% of total admissions for the period (significantly higher than the 10-year average of 48%), a level only seen once before in 2016.

It is clear that 2018 was a disappointing year overall, with certain films performing below forecasts. That said, there is no reason to question the underlying appeal of French cinema, which still commands an enviable place on all five continents. Among the majority-French productions in the top 20 for the year, 10 attracted more spectators abroad than in France, including *The Jungle Bunch: The Movie*, *The Insult* and *Maria by Callas*. The presence of French film festivals continued its steady rise (especially in Australia and Mexico) and the offer of French film was undiminished in terms of richness and diversity. Its distribution was influenced by strong competition

in terms of access to screens, and by changes in the marketplace and in spectator habits.

New films scheduled for 2019 should reveal that the figures for 2018 are a temporary blip. There are some highly-anticipated sequels in store: *We'll End Up Together*, *Serial Bad Weddings 2* and *Tanguy is Back*. Already out in some territories, in 2019 *Asterix: The Secret of the Magic Potion* will be released in many other territories and will fly the flag for French animation alongside *Funan*, *Minuscule – Mandibles from Far Away* and *Terra Willy*. The offer of upcoming family films includes *Mia and the White Lion*, *Rémi, Nobody's Boy* and *Aïlo's Journey*, while fans of emotional drama will enjoy *Anna*, *The Emperor of Paris* and *The Translators*. 2019 will also see the return of some auteurs who are festival regulars, such as Olivier Assayas (*Non-Fiction*), François Ozon (*By the Grace of God*), and Paul Verhoeven (*Benedetta*), not forgetting Lisa Azuelos (*Sweetheart*), Céline Sciamma (*Portrait of a Lady On Fire*), and Alice Winocour (*Proxima*).

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 2018

Film (International sales agent / Executive producer)	Admissions 2018* (million)	Cumulative admissions to 31/12/2018* (million)	Receipts 2018* (million €)	Cumulative receipts to 31/12/2018* (million €)
1 <i>Taxi 5</i> (EuropaCorp / T5 Production)	2,44	-	10,2	-
2 <i>C'est la vie!</i> (Gaumont / Ten Films, Quad / Main Journey)	1,67	2,18	11,6	15,2
3 <i>La Ch'tite Famille</i> (Pathé Production / Pathé Films)	1,06	-	7,98	-
4 <i>Belle and Sebastian, Friends for Life</i> (Gaumont / Epithète Films, Radar Films)	0,79	-	4,47	-
5 <i>White Fang</i> (SC Films International / Superprod)	0,78	-	4,11	-
6 <i>The Jungle Bunch: The Movie</i> (SND / TAT productions)	0,75	2,08	3,62	9,65
7 <i>Rolling to You</i> (Gaumont / Gaumont)	0,69	-	4,11	-
8 <i>Big Bad Fox & Other Tales</i> (StudioCanal / Folivari)	0,69	0,76	2,91	3,47
9 <i>The Young Karl Marx</i> (Mercure International / Velvet Film, Agat Films & Cie / Ex Nihilo)	0,66	0,94	3,23	5,18
10 <i>The Insult</i> (Indie Sales / Rouge International, Tessalit Productions)	0,51	0,71	3,34	4,83

(*Non-definitive figures)

TOP
5



The most-watched French film outside France in 2018 was **Taxi 5**. The action-comedy sold 2.44 million tickets in foreign markets, mainly in Asia and Eastern Europe. In China, where it was released on 6,000 screens, the film drew 1 million admissions, plus a further 426,000 in Russia. *Taxi 5* was released in more than 30 territories and, on the week of its release, featured in the top 3 of 13 of them. However, with the exception of the first installment (2.29 million spectators), its international performance fell short of the other episodes in the franchise.



In second position, **C'est la vie!** was a major hit in Spain (382,000 admissions) and Germany (361,000), and sold a total of 1.67 million tickets in 40 foreign territories. The comedy crossed the 100,000-admissions mark in Belgium, Israel, Italy, Russia, and Switzerland. Its international roll-out having begun at the end of 2017, *C'est la vie!* accumulated 2.18 million admissions abroad, a score approaching that of *Samba* (2.34 million admissions), but a long way from the exceptional performance of *The Intouchables* (31.9 million).



In third place was another comedy, which also attracted more than 1 million foreign spectators in 2018. **La Ch'tite Famille** fared particularly well in Europe, totaling 1.06 million admissions, including 282,000 in Germany. It also performed well in the French-speaking countries, like Belgium (306,000 spectators) and Switzerland (76,000). *La Ch'tite Famille* was the top French film of the year in Quebec (52,000 admissions).

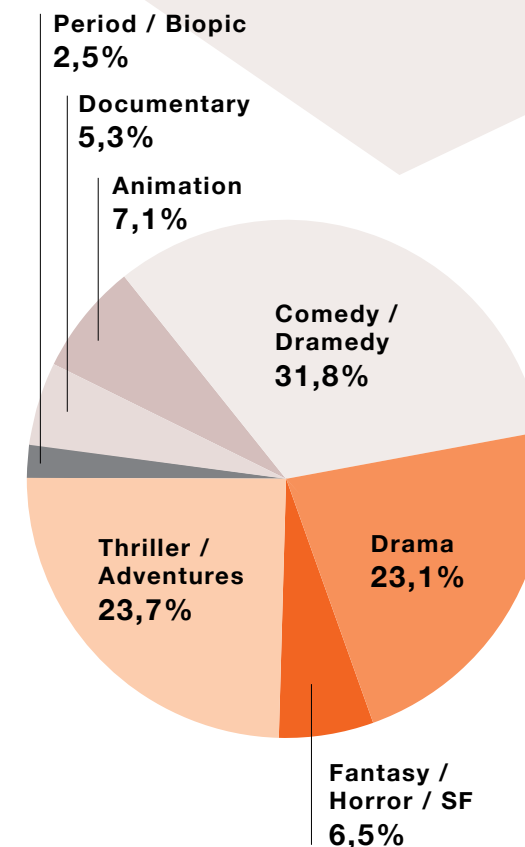


After *Taxi*, another franchise featured in the top 5. **Belle and Sebastian, Friends for Life** stood out in Poland (200,000 admissions) and especially in Italy, selling 444,000 tickets to become the biggest French hit of 2018. For the third time, Italy was the foreign country where the franchise sold the most tickets outside France. But overall, *Belle and Sebastian 3* did not equal the overseas performance of the further installments.



Rounding out the top 5 is another family film, **White Fang**, which had a very similar international trajectory to *Belle and Sebastian 3*, proving popular in Italy (333,000 admissions) and Poland (226,000 admissions), which accounted for more than 70% of total ticket sales. In Poland, *White Fang* was in the top 3 on its week of release and was then programmed more widely in some 200 theaters. A few weeks later, it was named the best-liked French film of 2018 by Polish audiences.

BREAKDOWN OF FRENCH FILMS ADMISSIONS ABROAD IN 2018 BY GENRE



ANIMATION

Alongside **White Fang**, several other titles contributed to the success of French animation in international markets. The fourth top performer in 2017, **The Jungle Bunch: The Movie** continued its roll-out and crossed the symbolic bar of 2 million spectators in some 60 foreign territories, helped by a further 745,000 admissions in 2018. **Big Bad Fox & Other Tales** was the only film to sell 500,000 tickets in a single country (China), with an overall total of 755,000 in more than 20 territories.



COMEDY

This genre accounted for one-third of the annual total, thanks to the latest titles from the duo of Nakache/Toledano and Dany Boon. Two other comedies garnered more than 500,000 admissions abroad: **Rolling to You** and **Le Brio**. One could also note the healthy performance of **Madame** (469,000 admissions) and **Les Tuche 3**, which sold 360,000 in Belgium alone. Among minority-French productions, **The Death of Stalin** performed well in English-speaking markets, totaling 1.84 million admissions.



DOCUMENTARY

Once again, North American audiences confirmed their appetite for French documentary. **Maria by Callas** saw its success build over the weeks until it reached more than 150 sites, crossing the bar of 1 million dollars in receipts in early December (around 150,000 admissions). **Faces, Places** opened in some new territories and totaled 430,000 admissions outside France, while the minority-French production **Pope Francis – a Man of his Word** sold close to 900,000 tickets, including 487,000 in Germany.



DRAMA & PERIOD / BIOPIC

The Young Karl Marx and **The Insult** both drew more than 500,000 admissions in 2018. The former performed well in China (450,000 admissions), reaching a total of 940,000 foreign ticket sales, while *The Insult* was a hit in North America with 126,000 admissions, taking it to a total of 714,000 outside France since 2017. **Call Me by Your Name**, a minority-French production, sold 3.41 million tickets (4.25 million in total).

BREAKDOWN OF FRENCH FILMS ADMISSIONS ABROAD IN 2018 BY REGION

★ TOP 5 TERRITORIES BY ADMISSIONS TO FRENCH FILMS IN 2018

Territory		Admissions 2018* (million)		Receipts 2018* (million €)
1	Italy	3,94	-11%	23,1
2	US & English-speaking Canada	3,92	-40%	29,1
3	Belgium & Luxembourg	2,93	+13%	20,8
4	Spain	2,92	-33%	17,5
5	Germany	2,78	-44%	21,1

(*Non-definitive figures)

BOX OFFICE HIGHLIGHTS

BPM (Beats Per Minute) was the only French-language film to generate more than £100,000 on its first week in the United Kingdom

Climax drew more admissions in Russia (84,000) than in France (62,000)

In Poland, **White Fang** sold more tickets in its second week than its first

The House by the Sea was on release for more than 10 weeks in Finland, Italy, and Sweden

Belleville Cop was the only French title in the weekly top 3 in Hungary

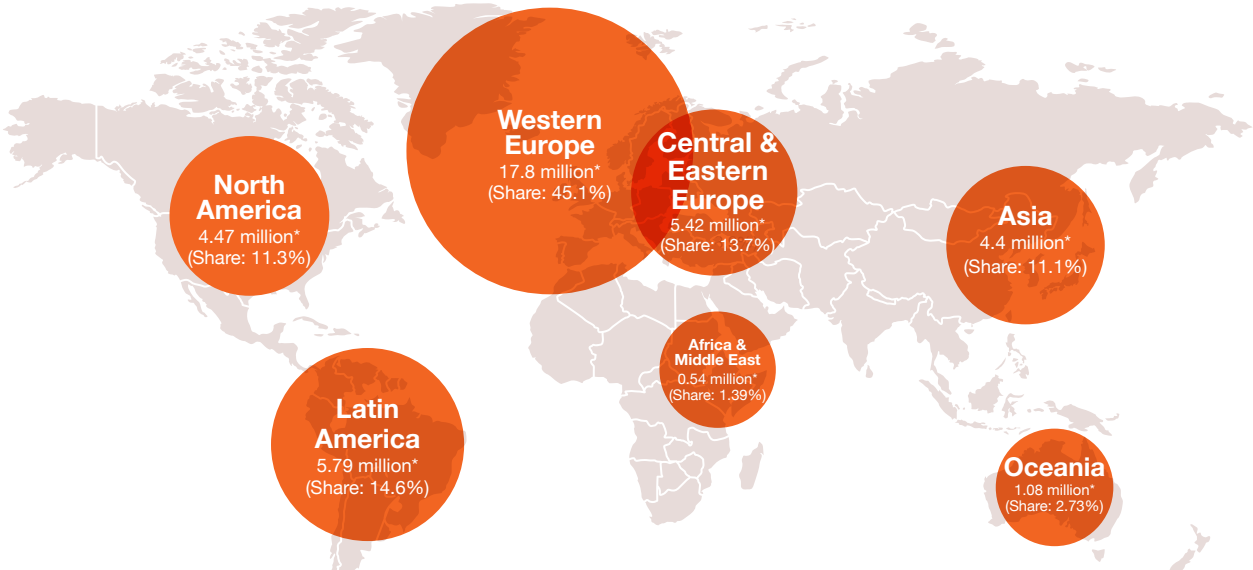
Maria by Callas and **Sink or Swim** took in nearly CA\$10,000 in per-screen average on the week of their release in Quebec

C'est la vie! was the best opening for a film directed by Nakache/Toledano in Russia (110,000 admissions)

The Jungle Bunch: The Movie was released in South Korea on almost as many screens as in France (331 compared to 361)

The Sisters Brothers is the only film by Jacques Audiard to cross the bar of \$3M at the US and English-speaking Canada box office

Les Tuche 3 had the strongest opening week of the three movies in the franchise in Belgium



For the third consecutive year, **Western Europe** was the leading region for the export of French films. With 17.8 million spectators in total, the region accounted for more than one in three admissions to French cinema over the period. Four territories in the region were in the top 5 in 2018 (compared to only one in the previous year), with Italy moving into top spot, thanks to a smaller fall in admissions. **C'est la vie!** was the only title to attract more than 1 million spectators in the region (including 382,000 in Spain), while several comedies enabled Belgium to increase the level of admissions compared to 2017.

For the first time, **Latin America** was in second position among export regions for French cinema. While 2015 remains a record year (22 million spectators with market share of 20.3%), the region's market share of 14.6% in 2018 was the **second-best performance for the region in more than 10 years**, thanks in part to three minority-French foreign-language productions. Mexico dropped out of the top 5 territories, but nonetheless remained the leader in the region with 2.38 million admissions, including 394,000 recorded during the last Tour de Ciné Francés. Brazil registered 1.44 million spectators.

Central and Eastern Europe held onto third place in the ranking, with 13.7% of worldwide admissions to French films abroad in 2018. After an upsurge in 2017, the region experienced a sharp drop in admissions, down 60.6%. Russia and Poland were level on 1.4 million admissions, but slipped into the lower half of the top 10 foreign territories. No film sold more than 1 million tickets. **Taxi 5** was the top performer in the region, totaling 933,000 admissions, including 426,000 in Russia.

In 2018, the fourth-biggest export region for French film was once again **North America**. For the past 10 years, the region has seen its market share gradually dwindle, now approaching 10%. The breakout hit **Call Me by Your Name** (minority production) drew 1.46 million admissions, while **The Sisters Brothers** accumulated more than \$3 million in receipts (360,000 admissions). For its part, Quebec remained just above the threshold of 500,000 admissions.

With 4.4 million admissions, **Asia** dropped to become the fifth region for the export of French cinema in 2018, in the absence of a runaway hit like **Valerian and the City of a Thousand Planets**, which drew 13.6 million admissions the prior year. **Taxi 5**, the top-selling French film of the year in the region, totaled 1.17 million admissions. In China, despite one more release than in 2017, admissions to French films fell by 80%, and only **The Young Karl Marx** attained more admissions than in France (450,000 compared to 176,000).

Total admissions generated by French films in **Oceania** were once again over the bar of 1 million, the region accounting for 2.73% of worldwide admissions for French cinema in 2018. The fall is estimated at 41%, one of the lowest compared to other regions. The French-language films that fared best were **C'est la vie!** (87,000 admissions) and **Back to Burgundy** (66,000 admissions).

(*Chiffres non définitifs)

THE PERFORMANCE OF INDUSTRY PROFESSIONALS IN FOREIGN MARKETS IN 2018

★ TOP 10 INTERNATIONAL SALES AGENTS

By admissions to majority-French films abroad in 2018*

International sales agent	
1	Gaumont (<i>C'est la vie!</i> , <i>Belle and Sebastian 3</i>)
2	EuropaCorp (<i>Taxi 5</i> , <i>Miss Sloane</i>)
3	StudioCanal (<i>Big Bad Fox & Other Tales</i> , <i>Sink or Swim</i>)
4	Pathé Films (<i>La Ch'tite Famille</i> , <i>Le Brio</i>)
5	Playtime (<i>The Young Karl Marx</i> , <i>Let the Sunshine In</i>)
6	SND (<i>The Jungle Bunch: The Movie</i> , <i>Just to Be Sure</i>)
7	Wild Bunch (<i>Les Frères Sisters</i> , <i>Climax</i>)
8	MK2 Films (<i>Maria by Callas</i> , <i>The House by the Sea</i>)
9	TF1 Studio (<i>The Extraordinary Journey of the Fakir</i> , <i>Just a Breath Away</i>)
10	Indie Sales (<i>The Insult</i> , <i>Mademoiselle de Joncquières</i>)

★ TOP 10 EXECUTIVE PRODUCERS

By admissions to majority-French films abroad in 2018*

Executive Producer	
1	T5 Production (<i>Taxi 5</i>)
2	Quad / Main Journey (<i>C'est la vie!</i> , <i>A Bag of Marbles</i>)
3	Radar Films (<i>Belle and Sebastian 3</i>)
4	Ten Films (<i>C'est la vie!</i> , <i>Just a Breath Away</i>)
5	Curiosa Films (<i>Let the Sunshine In</i> , <i>The Other Woman</i>)
6	Gaumont (<i>Rolling to You</i> , <i>A Bag of Marbles</i>)
7	Pathé Production (<i>La Ch'tite Famille</i> , <i>Le Brio</i>)
8	Agat Films & Cie / Ex Nihilo (<i>The Young Karl Marx</i> , <i>The House by the Sea</i>)
9	Superprod (<i>White Fang</i>)
10	TAT productions (<i>The Jungle Bunch: The Movie</i>)

★ TOP 10 FOREIGN DISTRIBUTORS

By admissions to majority-French films abroad in 2018*

Distributor	Territory	Highest-Grossing Movie in 2018
1	China Film Group	China <i>Taxi 5</i>
2	Alternative Films	Belgium & Luxembourg <i>Les Tuche 3</i>
3	Notorious Pictures	Italy <i>Belle and Sebastian 3</i>
4	A Contracorriente Films	Spain <i>C'est la vie!</i>
5	Belga Films	Belgium & Luxembourg <i>Nothing to Hide</i>
6	Nueva Era Films	Mexico <i>Mr. Know-It-All</i>
7	Kino Swiat International	Poland <i>White Fang</i>
8	Central Partnership	Russia <i>Taxi 5</i>
9	Adler Entertainment	Italy <i>White Fang</i>
10	Universum Film	Germany <i>C'est la vie!</i>

(*Non-definitive figures)

★ One could also note some companies (international sales agents and/or executive producers) which performed well abroad in 2018 thanks to the success of

minority-French productions, such as **Memento Films** (*Call Me by Your Name*, *Everybody Knows*) and **Kinology**, **Logical Pictures**, and **Mars Films** (*Ghostland*).

★ This chart shines a light both on foreign distributors and territories historically linked to French cinema and crucial for its influence abroad. Logically, we can find the biggest hits of the year in the most important markets, but also a few less exposed films and their

heathy performances in some specific countries. Despite a less brilliant year than 2017, China tops this list: for a French film, a release in this market is still regarded as a desired but unpredictable event.



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