



THE TOP SELLING

# FRENCH FILM GENRES

IN FOREIGN MARKETS

13 GENRES 20 YEARS OF STATISTICS

COMEDY  
DRAMA  
HORROR  
SCIENCE FICTION  
FANTASY  
THRILLER  
ADVENTURE  
CRIME  
WAR  
PERIOD  
BIOPIC  
ANIMATION  
DOCUMENTARY





This study seen from the perspective of genre underlines just how much the international marketplace embraces and reflects the rich diversity of French cinema. Over the past 15 years, French production has expanded into different areas. Contrary to popular belief, French cinema is not limited to dramas and comedies. Animated films; documentaries, notably wildlife; thrillers, often English-language; biopics of major national figures known around the world: French cinema has no qualms about tackling any kind of genre, and audiences abroad seem to have understood this better than anyone.

As such, foreign audiences now outstrip the number of spectators in France for documentaries, thrillers, period films, fantasy films, and biopics. This is mainly due to the fact that comedy, the genre which dominates the French box office (66% of admissions for French films), accounts for a much smaller proportion in foreign markets (only 35%, although it remains the dominant genre). That leaves more room for other genres to have much greater visibility than on the domestic market. Comedy nonetheless remains the genre with the greatest number of productions in circulation – as many as all the others put together. Drama, which encompasses arthouse films, accounts for the second biggest contingent of French films on the international scene. It is also the most widely represented genre on the international festival circuit, but dramas draw fewer admissions in foreign theaters than in France. Likewise, crime films and animations do not outstrip their national performance in foreign markets.

Certain genres almost automatically travel better than others. Among biopics, animations, and period films, nine out of 10 films have a foreign release. The genre which exports the least well is documentary.

Shooting in English can be an advantage, but only for certain types of film like thrillers, period or fantasy films. Some 80% of admissions for these genres are recorded by English-language pictures. Conversely, 4 out of 5 admissions for comedies, biopics and crime films are clocked up by films shot in French. It should be noted that animations and documentaries are not concerned with the issue of language, since they are almost always dubbed.

Budget is also a criteria for successfully breaking out beyond French borders. In the case of thrillers, biopics and animations, box office performance tends to be greater, the bigger the film's budget. Receipts for dramas and comedies are less closely associated with production costs. Only documentaries can hope to achieve success on a relatively low budget.

This overview by genre of the circulation of French films abroad is altogether enlightening. It shows the vitality of national production, but also reveals some potential yet to be explored. Should we produce expensive movies in English to maintain a presence in certain genres in the international marketplace? Can dramas break through in Russia? Can French animation measure up in Japan? Are US audiences inherently resistant to French comedy? Which genres should we offer to new Chinese audiences? This study provides the elements to answer these questions.

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13 GENRES 20 YEARS OF STATISTICS

# OVERALL STATISTICS

## FROM 1995 TO 2014

**Dramas, comedies, thrillers, biopics, animations, documentaries... The strength of French cinema resides in its diversity.** Reflecting the varied audiences for French films abroad, this diversity contributes to enhancing the appeal of the world's second-biggest film exporting nation.

**For the past 10 years, French films have sold an average of 80 million tickets per year on foreign markets. But which genres of films are selling abroad ?**

To find out, it is first necessary to identify which genres travel best. Which territories have the greatest appetite for French comedies? Which genres have sold more tickets abroad than in France over the past two decades? What are the budgets of the biopics that did best in international markets? How many admissions does a French thriller attract on average in foreign theaters?

To answer these questions and more, this study focuses on the figures for majority-French productions tracked by UniFrance in almost 100 territories since 1995. The 9 genres recognized by this report correspond to the CNC's categories, which are the following: Animation, biopic, comedy/dramatic comedy, documentary, drama, fantasy/science fiction/horror, war/period drama, crime film, and thriller/adventure. To avoid complicating the analysis, we will refer to all comedy/dramatic comedy as simply comedy; fantasy/science fiction/horror as fantasy; war/period films as just period; and thriller/adventure as simply adventure. Any distinction between these sub-genres will be made as and when necessary.

### GEOGRAPHICAL BREAKDOWN OF ADMISSIONS FOR EACH GENRE

(see map on opposite page)

Ticket sales of French films **in France** are characterized by a **dominance of homegrown comedies and dramatic comedies**. Over the past 20 years, two-thirds of admissions for majority-French productions were concentrated in this one genre in French theaters. This was followed by drama (11%), adventure (7%), then animation (4%). **The picture is very different in the rest of the world.**

**In foreign theaters** across all territories, **French comedies were still the dominant genre, but to a much lesser extent**, accumulating one-third of total French cinema admissions. Adventure films accounted for a quarter of total admissions, while dramas and fantasy films each accounted for more than 1 in 10 spectators for French films. The other genres all accounted for less than 5% of the total audience for French cinema abroad. The way of life in western Europe is closest to that of the French, and as such, this region shows a distinct taste for French comedies, as does central and eastern Europe, which also exhibits a certain appetite for fantasy and adventure films. By contrast, admissions in both Asia and North America were largely taken up by adventure films. Latin America and Oceania show a more balanced spread.

### METHODOLOGY

UNIFRANCE FIGURES ONLY TAKE INTO ACCOUNT THOSE FILMS GRANTED CERTIFICATION FROM THE CENTRE NATIONAL DE LA CINÉMATOGRAPHIE (CNC). THE FOREIGN DATA COMES FROM OFFICIAL OR PROFESSIONAL ORGANIZATIONS, SPECIALIST COMPANIES, DISTRIBUTORS, AND FRANCE'S AUDIOVISUAL ATTACHÉS ABROAD. THE THEATRICAL ADMISSIONS FIGURES THAT APPEAR IN THIS STUDY COVER THE 20 YEARS FROM 1995 TO 2014, AND ONLY INVOLVE MAJORITY-FRENCH FINANCED PRODUCTIONS THAT RECEIVED CERTIFICATION SINCE 1994, REGARDLESS OF LANGUAGE. MINORITY-FRENCH COPRODUCTIONS AND FILMS CERTIFIED BEFORE 1994 HAVE BEEN INTENTIONALLY LEFT OUT OF THIS STATISTICAL ANALYSIS.

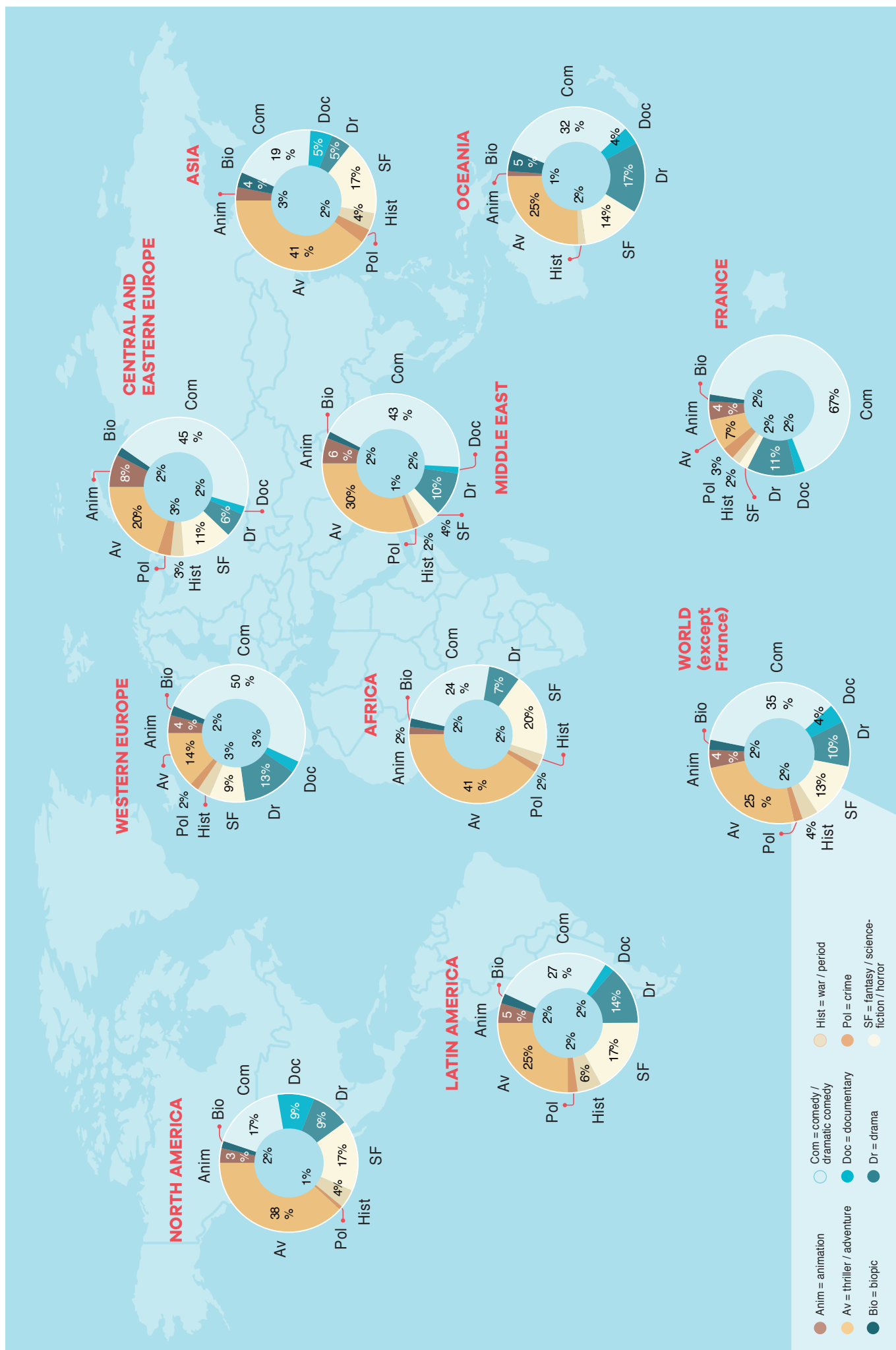
Unsurprisingly, admissions across **western Europe** – the leading region for the export of French films – show the greatest similarities with France. Comedies have accounted for half of all admissions since 1995 (50%), while dramas accounted for 13% during the period. Animation accounted for 4% of total admissions, period films 3%, crime films 2%, documentaries 3%, and biopics 2%, which means the European audience for these films is roughly proportional to that in French theaters. By contrast, fantasy films (9%) and adventure films (14%) had twice the market share of that on home territory.

In **central and eastern Europe**, almost half of ticket sales were taken up by comedies (45%), while animation, on 8%, attracted twice its market share in France, notably thanks to its popularity in Russia, Poland and the Czech Republic. Dramas attracted a smaller share of the audience, accounting for 6% of total ticket sales compared to 11% in France.

In **North America**, adventure films was the dominant genre, pulling in more than one-third of admissions (38%), ahead of comedies (17%) and fantasy films (also 17%). The strong performance of adventure and fantasy movies Stateside is in correlation with the dominance of English-language productions in these 2 genres. One can also note the healthy market share for documentary in the region (9%), driven by a handful of titles that enjoyed considerable local success.

In **Asia**, adventure films also dominated, accounting for 41% of total admissions for French films during the period studied (compared to 7% in France). It was a similar story for fantasy films, cornering 17% of admissions in Asia compared to 2% in France. Both genres were particularly popular in China and South Korea. By contrast, dramas accounted for just 5% of total admissions for French films in the region.

**Latin American** audiences were especially fond of comedies (27%) and adventure films (25%), and to a lesser extent fantasy films (17%), followed closely by dramas (14%), with a great market share across the region for period films (6%) than that in France (2%).



In **Oceania**, French biopics (5%) and documentaries (4%) attracted a larger market share than they do on French territory. 1 in 4 tickets sold for French movies were for adventure films (25%), whereas one-third were for comedies (32%).

In **Africa and the Middle East**, the two dominant genres were comedy (43% in the Middle East, 24% in Africa) and adventure films (30% in the Middle East, 41% in Africa).

## BREAKDOWN OF ADMISSIONS BY GENRE ACROSS 10 MAJOR TERRITORIES

(see graphic opposite)

The leading territory for the export of Gallic movies is the **United States and English-speaking Canada, where audiences are chiefly drawn to adventure pictures (41%)**, and then fantasy (18%), genres which figure strongly among French productions made in English (e.g. the *Taken* franchise, Luc Besson's movies *Lucy* and *The Fifth Element*, etc). In third place in terms of admissions over the past 20 years, French comedies (14%) have historically struggled to find an audience on the other side of the Atlantic, with a few notable exceptions like *Amélie* and *The Artist*.

By contrast, 4 of the major European territories have movie-going habits that are closer to those of the French public. **In Germany, Spain, Italy and Belgium, comedy was the genre which sold most tickets among French films**, accounting for at least half of all spectators in Germany (58%), Spain (50%) and Belgium (67%). *The Intouchables*, the *Asterix* franchise, and more recently *Serial (Bad) Weddings* figure among the genre's biggest hits in these markets. Dramas hold their own in Italy, where the genre accounts for 19% of total admissions thanks to hits like *The Secret of the Grain*, *The Class* and *Man on the Train*. German audiences were proportionally more receptive to French documentaries (5% of admissions, compared to 2% in France), embracing movies such as *March of the Penguins* and *Winged Migration*, whereas only 1% of the Spanish audience for French films bought tickets for the genre, preferring instead period films (5% of ticket sales for French film, compared to 2% in France), with titles such as Roman Polanski's *The Pianist*. One can also note the close correlation between the popularity of the various genres in France and in Belgium.

**The United Kingdom remains one territory with a clear appetite for French animation**, where the genre accounted for 10% of total French movie admissions, driven by the *Arthur and the Minimoys* franchise and *The Magic Roundabout*. Dramas also accounted for a sizeable market share (15%, with successes including *A Prophet*, *Hidden*, and *I've Loved You So Long*). Comedies only accounted for 22% of admissions to French pictures.

**In Russia, the market share for French animation, at 8%, is double that for the genre on home turf. Nearly 1 in 2 spectators were tempted by comedies** (43%, with the *Asterix* and *Taxi* franchises proving to be major hits), but

dramas performed poorly (4%). 1 in 4 ticket sales for French cinema in Russia involved adventure films (25%).

In Asia, **audiences in China showed a strong appetite for French adventure films** with 45% of total admissions (mainly concentrated on EuropaCorp's English-language productions), while fewer than 1 in 6 admissions were for Gallic comedies (15%). Dramas fell back strongly in this territory to just 4%. **Japanese audiences exhibited very varied tastes**, with more than 5% of total admissions for each genre, except French animation (2%).

In **Mexico**, the 10th biggest export territory for French cinema over the past two decades, animation accounted for almost double its market share in France (7%), while the share for French dramas reached 10% (*A Very Long Engagement*, *Irreversible*, etc). Almost 1 in 3 spectators for French films opted for adventure titles (30%), while the audience for French comedies remained relatively modest, accounting for 19% of total admissions since 1995.

## BREAKDOWN OF GENRES BY NUMBER OF RELEASE TERRITORIES

(see graphic p.8)

This comparative graphic provides an analysis of all French films that benefited from a release in at least one foreign territory, and helps to identify the international potential of the various genres studied here. Animation is the genre released in the largest number of territories. Biopics also travel particularly well. However, documentaries typically export to a smaller number of markets. Comedies, which attract the most admissions abroad, have a more balanced distribution pattern.

**Animation seems naturally destined for a wider international roll-out**, in keeping with the significant release budgets. Two-thirds of films are released in more than 4 territories (67%), and one-third enjoy a release in more than 30 territories (32%).

**The same goes for biopics**, a majority of which (55%) are sold to at least 20 international markets. Only 10% of films in this genre are released in just 1 or 2 territories.

**Fantasy films also enjoy wide international reach**, with 53% of films

released in 10 territories and more. On the other hand, **dramas, comedies and crime films present a more balanced picture**, with roughly the same number of titles released in fewer than 10 territories as those released in a greater number of markets.

**Period films and adventure films are a natural fit for international distribution**, with almost half (47%) selling to more than 10 markets, compared to around 1 film in 5 being released in only 1 or 2 territories (respectively 17% and 21%).

Lastly, **documentary shows a significant split between big and small releases**. Some 44% of titles have a small-scale international roll-out (released in just one or two foreign markets), while one in five French documentaries released abroad (20%) are sold to more than 30 territories.

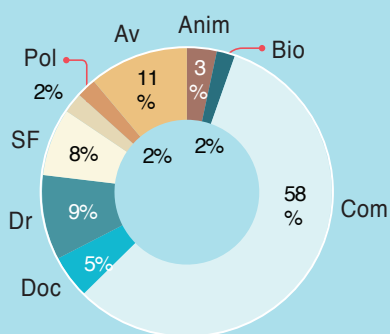




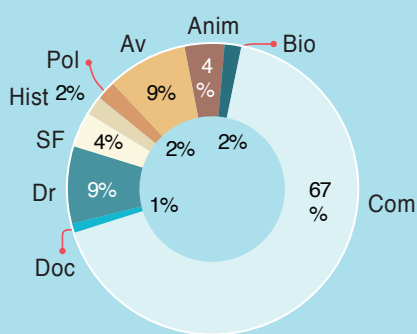
## BREAKDOWN OF ADMISSIONS BY GENRE ACROSS 10 MAJOR TERRITORIES

(market share by genre as a percentage of total admissions for French films in each territory)

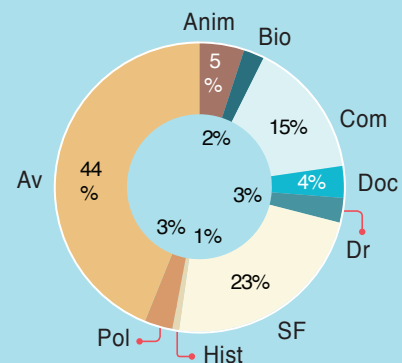
### GERMANY



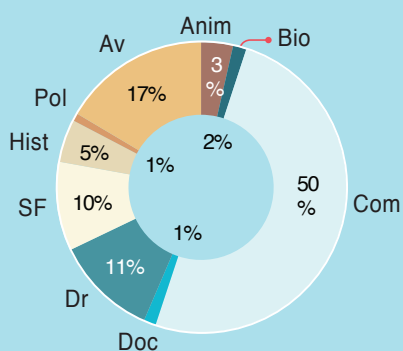
### BELGIUM AND LUXEMBOURG



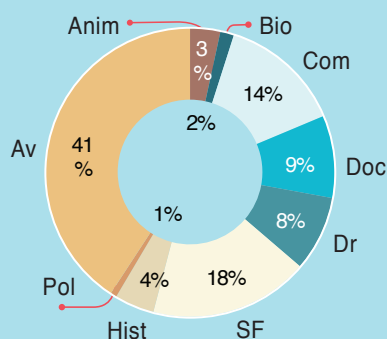
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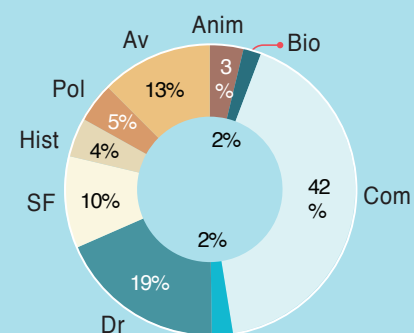
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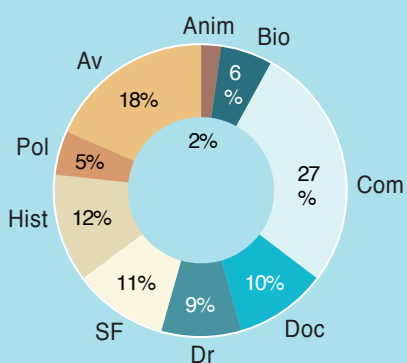
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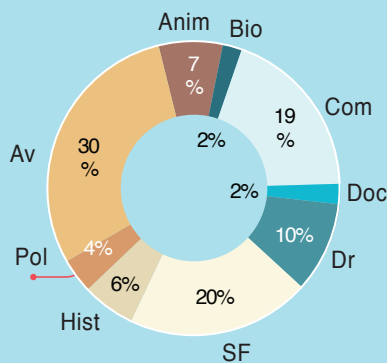
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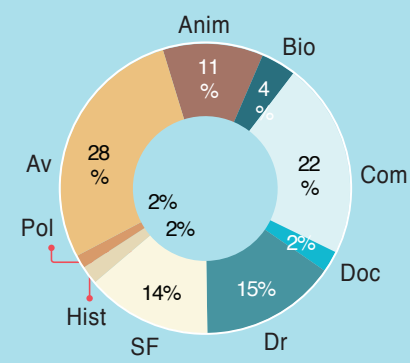
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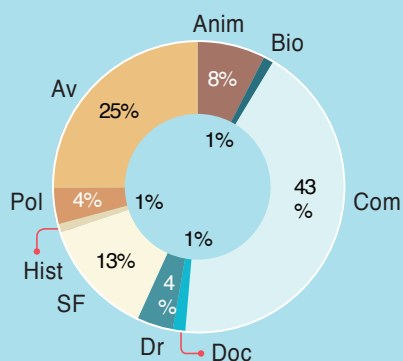
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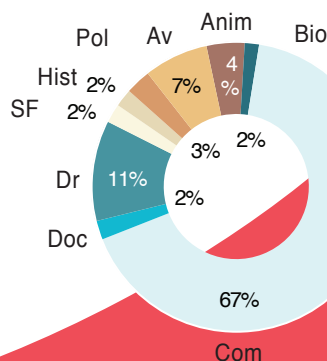
### UNITED KINGDOM



### RUSSIA

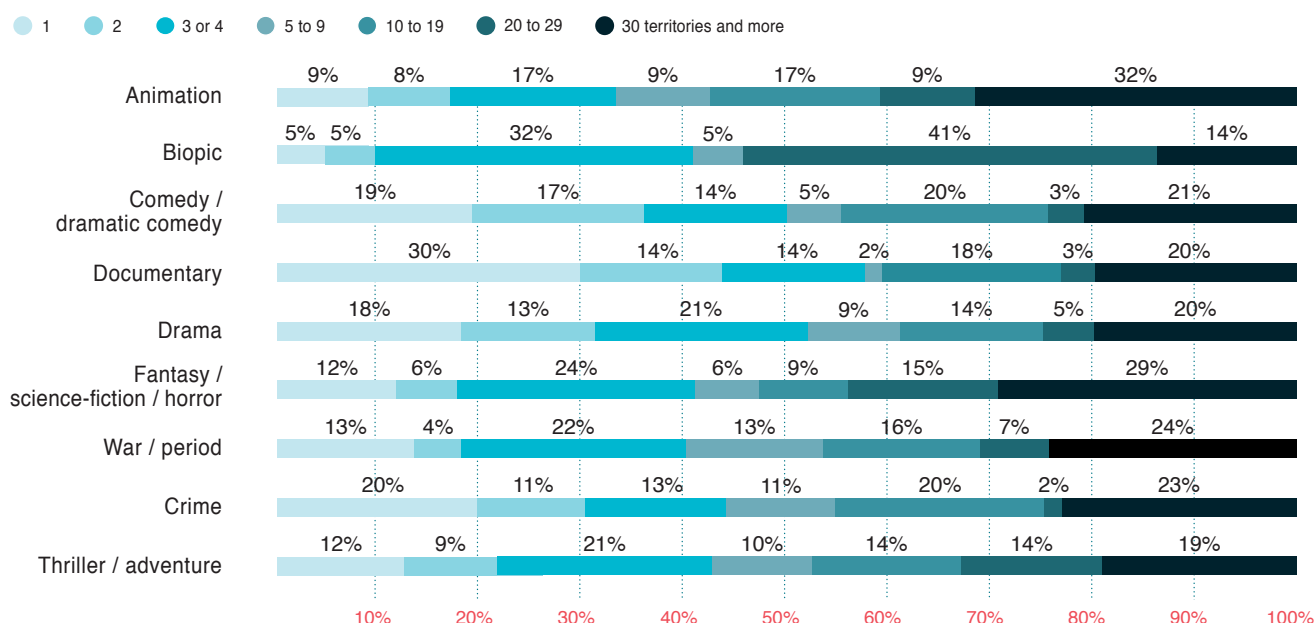


### FRANCE

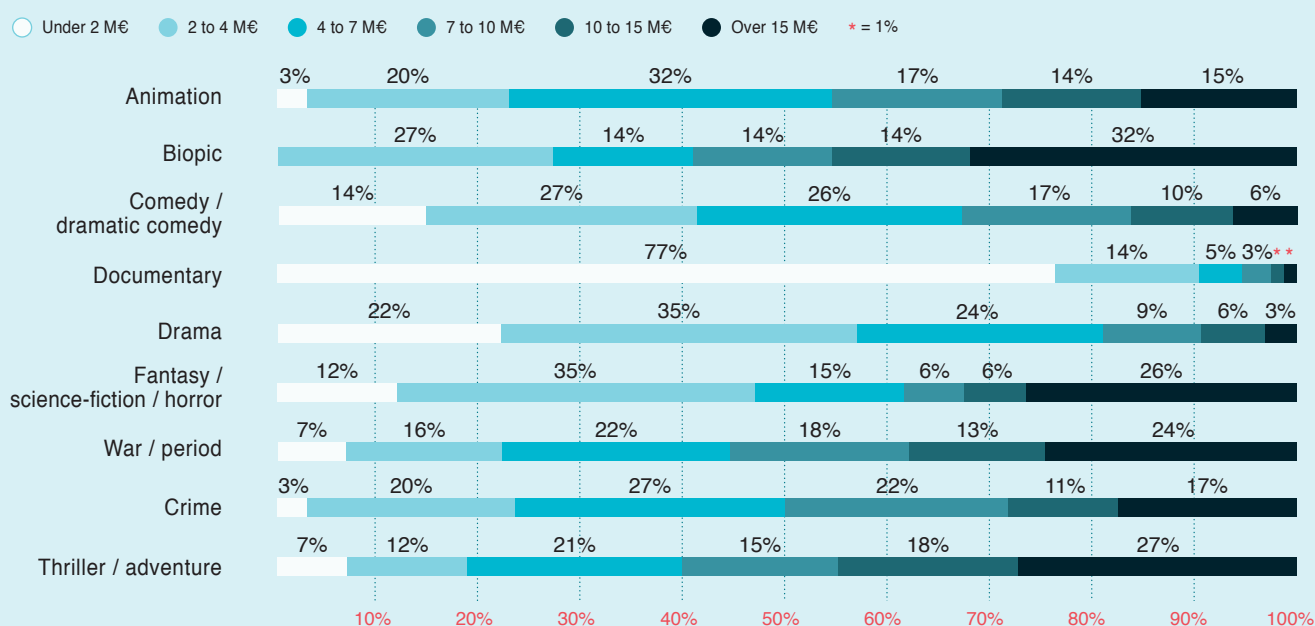


- Anim = animation
- Av = thriller / adventure
- Bio = biopic
- Com = comedy / dramatic comedy
- Doc = documentary
- Dr = drama
- Hist = war / period
- Pol = crime
- SF = fantasy / science-fiction / horror

## BREAKDOWN OF GENRES BY NUMBER OF RELEASE TERRITORIES



## BREAKDOWN OF THE NUMBER OF FILMS RELEASED BY PRODUCTION BUDGET



Based on the number of films that were released in at least one foreign market, an analysis of the production budgets characteristic of each genre (see graphic above) reveals several points.

What stands out most is the generally **small budgets for French documentaries**, with more than three-quarters of films with a foreign release (77%) costing less than €2 million, while **more than half of all biopics (60%), period films (55%), crime films (50%) and adventure films (60%) had substantial budgets** greater than €7 million.

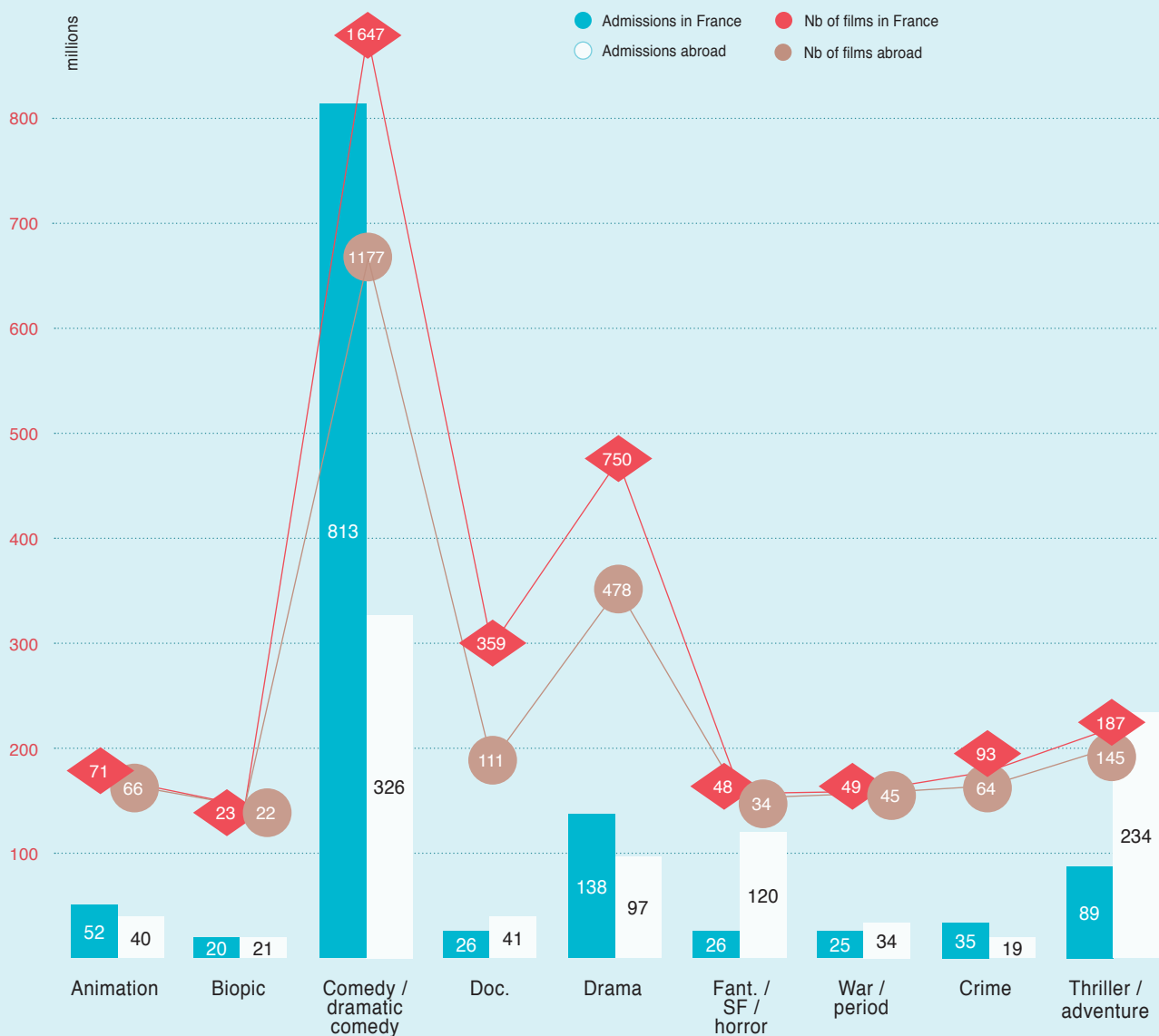
**Animation naturally involves bigger budgets, and more than three-quarters of films in this genre (78%) had budgets greater than €4 million.** It is no surprise that only 3% of French animations had a production budget

lower than €2 million. 1 in 4 films (26%) with a foreign release were in the “middle” bracket (€4-7 million), **comedies and dramas which showed a more balanced performance.** Comedy – by far the most widely produced genre in the past 20 years – has moved away from bigger budgets, with only 1 in 6 films (16%) with an international release costing more than €10 million. Dramas are also showing budgetary restraint, with more than half of films (57%) costing less than €4 million, and four-fifths (81%) having a production budget of less than €7 million.

**Fantasy films show a significant split between low-budget productions** (47% costing less than €4 million) and more sizeable budgets (38% costing more than €10 million), with a something of a gap in the middle (only 15% of films with an international release).



## COMPARISON OF GENRES IN FRANCE AND ON THE INTERNATIONAL MARKETPLACE



The above graphic shows that the lion's share (66%) of majority-French productions in the past two decades were released in at least one foreign territory. Of the 3,227 majority-French films released in French theaters between 1995 and 2014, 2,142 films – or two-thirds – had a theatrical release in at least one foreign market.

Closer examination reveals that **3 genres exhibit a very high domestic-to-foreign release ratio**, with more than 9 out of 10 films released in France enjoying at least one foreign release: **biopics** (96%), **animation** (93%) and **period films** (92%). Unsurprisingly, these are the genres most closely associated with multiple foreign releases and higher production budgets.

Also **above the average in terms of foreign-to-domestic release ratio** were **adventure** films (78%), **comedies** (71%), **fantasy** films (71%) and **crime** films (69%), with dramas not far behind (64%). **The genre which exports least well remains documentary**, with fewer than 1 film in 3 (31%) finding a release outside French territory.

An analysis of the France/international ratio over the past 20 years reveals the **strong performance of fantasy**

**and adventure films on the international market**, with respectively 82% and 72% of their worldwide admissions coming from outside France. Conversely, **comedies only generate 29% of their total admissions outside France**, which is due to the predominance of the genre at the French box office.

Similarly, **dramas** (41%), **animations** (43%) and **crime** films (35%) **register the majority of their ticket sales on home territory**. Meanwhile **documentaries** (61%), **biopics** (51%) and **period** films (58%) all recorded **slightly higher levels of admissions in foreign markets than in France**.

## EVOLUTION OF THE NUMBER OF FILMS BY YEAR OF PRODUCTION

By studying the graphic of the number of films released in international markets by year of production (according to CNC certification), one can see that **the number of French films released abroad each year naturally follows the evolution of French production on national territory**. It is important to note that 2013 shows a far lower number of films than in the previous years because several films that obtained certification that year had yet to be released in any foreign markets by the end of the following year. (2014 has been deliberately omitted for the same reason.)

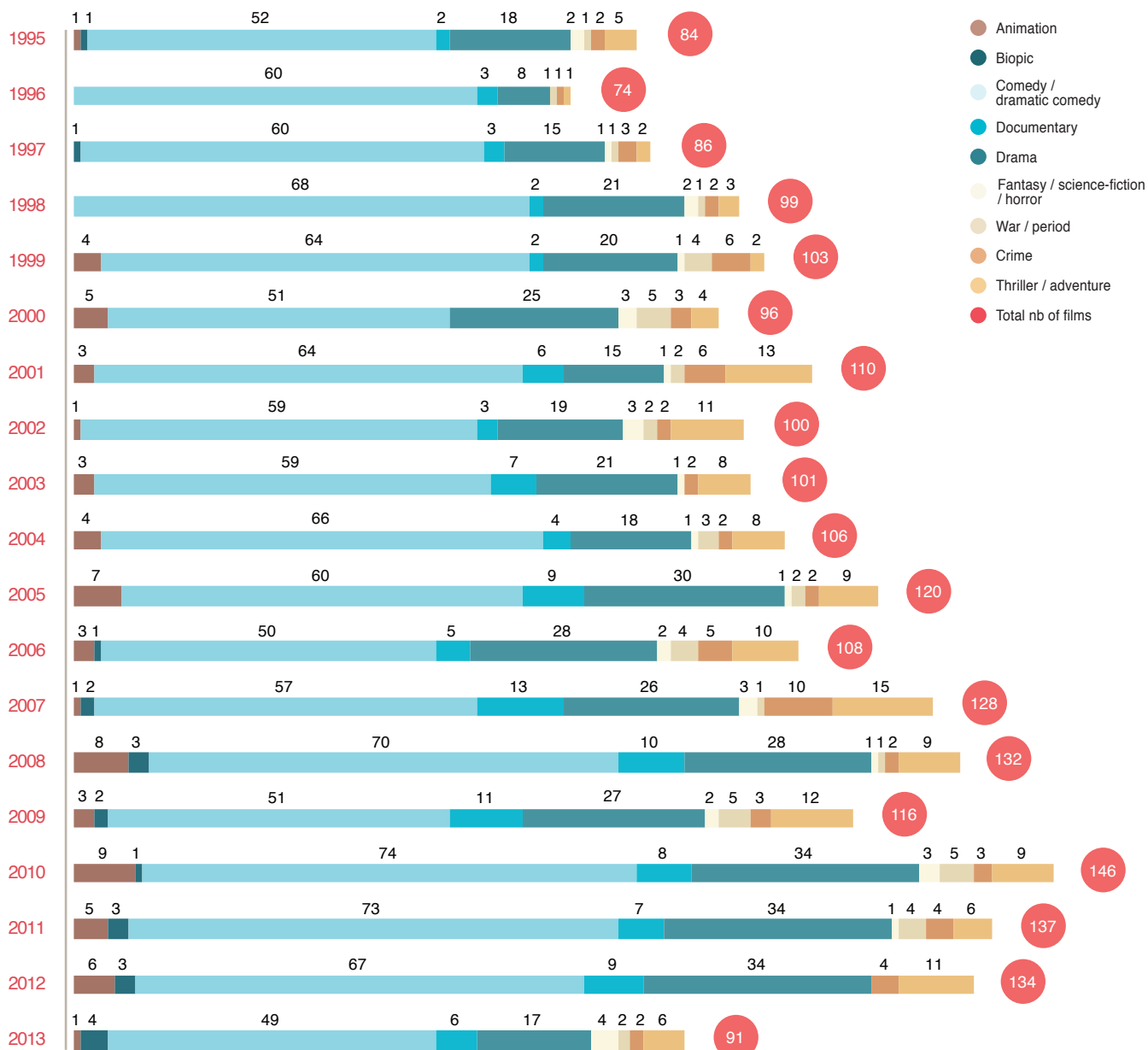
Despite a slight drop since 2010 – a record year when 146 majority-French productions receiving certification had at least one international release (compared to a total of 203 films receiving certification, in other words 72%) – **the great majority of French productions enjoy an international career**, as previously observed.

Among these, **comedies account for more than half the films released abroad in the past 20 years**. The volume of films in the genre that sold abroad

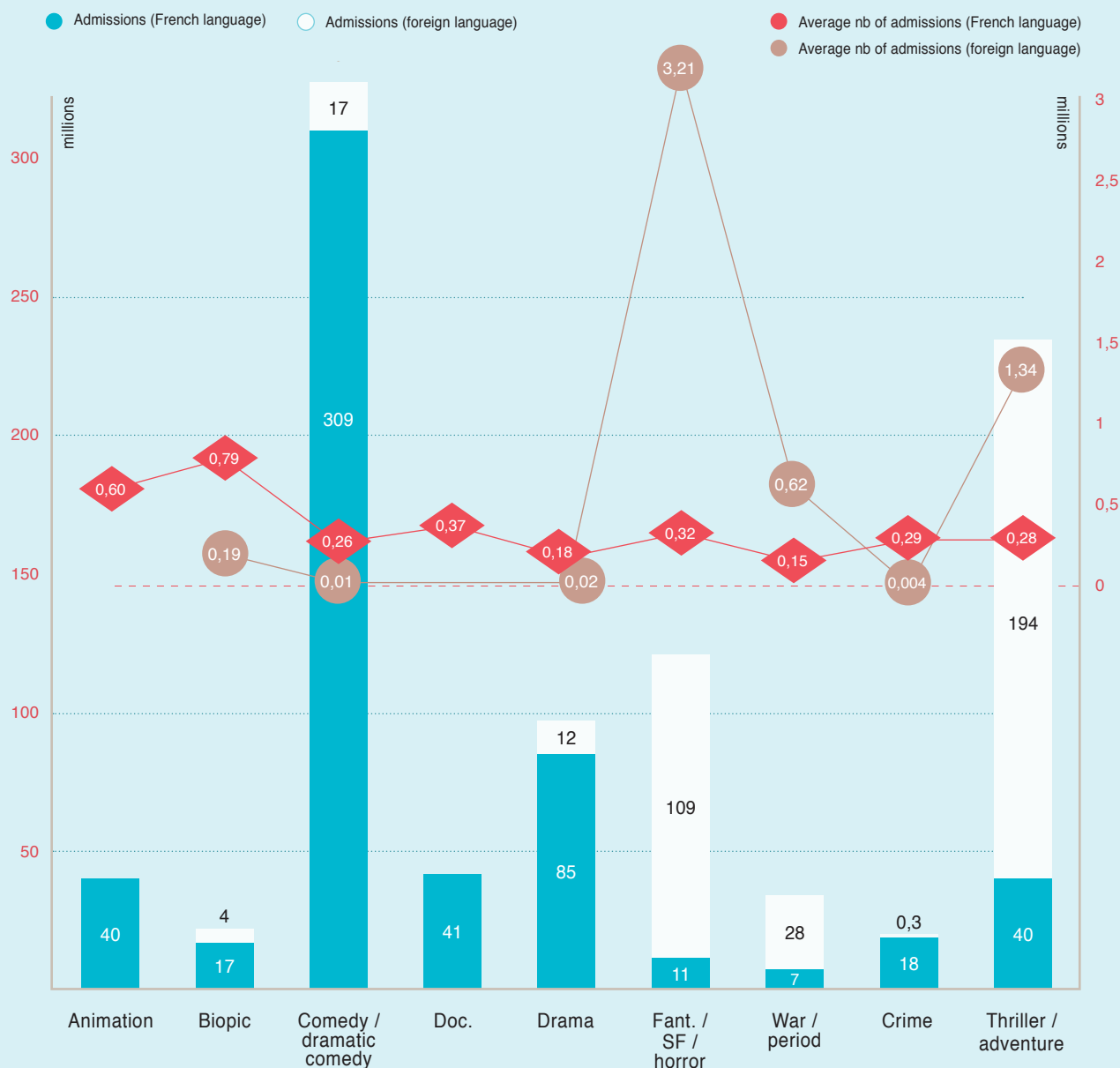
remained relatively stable during the period, with just over 60 majority-French productions released internationally each year.

With 23 and 6 films respectively produced on average per year since 1995, **dramas and documentaries released abroad have increased in absolute terms** during the period. Although animation films first appeared in foreign theaters at the end of 1998 (*Kirikou and the Witch* received its classification in 1995, but was released in 1998), **the number of annual international animation releases has since varied widely**, from 0 to 8 productions per year enjoying a foreign release, with a similar pattern for crime films (from 1 to 10 films per year). The same goes for adventure films, with an average of around 8 productions per year, but wide fluctuations from one year to the next.

Given the small proportion they make up of total French production, the volume of biopics, adventure films and fantasy films sold to international markets has varied significantly from one year to the next since 1995.



## BREAKDOWN OF ADMISSIONS BY GENRE AND BY LANGUAGE AROUND THE WORLD



More than 4 out of 5 admissions for adventure, period and fantasy films are French films in a foreign language, which bears a close correlation with the strong performance of these 3 genres in territories that are generally resistant to films in French.

The opposite is true for comedies, dramas, biopics and crime films, for which 4 out of 5 admissions are for films shot in French, most of these genres enjoying a higher market share in France's neighboring countries in western Europe.

Similarly, the genres for which theatrical performance is dominated by foreign-language films saw their average number of admissions reach great heights: more than 3.2 million on average for foreign-language fantasy films (10 times more than films of the same genre in French), and more than 1.3 million for foreign-language adventure films (compared to 280,000 for those made in French).

Foreign-language period films drew an average of 620,000 admissions abroad over the past two decades,

significantly higher than the average of 435,000 for films in all languages across the total of 2,142 majority-French productions released abroad in the past 20 years.

On a more modest level, French-language comedies drew an average of 260,000 foreign admissions in the past 20 years, while crime films fared slightly better with an average of 290,000 ticket sales per film. The lowest average admissions for French-language productions fell to period films (150,000) and dramas (180,000), whereas biopics made in French drew some 800,000 ticket sales per title. Animations and documentaries, which, due to their nature, tend to be adapted into the local language, attracted on average 600,000 and 370,000 admissions respectively in theaters outside France.

**STUDY WRITTEN BY QUENTIN DELEAU**  
**UNDER THE SUPERVISION OF GILLES RENOARD**

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