



**23<sup>rd</sup> RENDEZ-VOUS WITH**

# **FRENCH CINEMA**

**PARIS / JANUARY 13 - 15 2021**

**FRENCH FILMS ON  
THE INTERNATIONAL  
MARKETPLACE  
AND AT FESTIVALS  
IN 2020**

# RESULTS FOR FRENCH FILMS ON THE INTERNATIONAL MARKET PLACE **IN 2020**

**13.7\***  
**MILLION**  
**ADMISSIONS**

**down 69.8%\* compared to 2019**

Note: In France, French films generated  
29.2\*\* million admissions in 2020,  
down 60.7%\*\* compared to 2019

**86.6\***  
**MILLION**  
**EUROS**  
**IN RECEIPTS**

**down 68.6%\* compared to 2019**

## **IN 2020, FRENCH CINEMA SAW INTERNATIONAL BOX OFFICE RECEIPTS SHRINK, BUT RETAINED ITS PLACE IN FOREIGN MARKETS AND FESTIVALS**

- ▶ **9.5\* million admissions (69.5%\* of the total)** for majority-French productions (38 million in 2019, down 75%\*)
- ▶ **10.6\* million admissions (77.6%\* of the total)** for French-language films (26.9 million in 2019, down 60.6%\*)
- ▶ **611\* French films on release in foreign theaters** (869 in 2019, down 29.7%\*)
- ▶ **1,398\* releases of French films** (2,836 in 2019, down 50.7%\*)
- ▶ **2\* French films sold more than 1 million tickets abroad** (7 in 2019)
- ▶ **28\* French films drew more than 100,000 spectators abroad** (68 in 2019)
- ▶ **Russia becomes the leading territory in terms of admissions** for French films in 2020, ahead of Spain and Italy\*
- ▶ **163 French films were selected across 8 major international film festivals\*\*\* and accounted for 19.5% of the films presented** (199 and 19% in 2019, down 18.1% and up 2.6%)

### **Note:**

\*The figures given in this brochure are provisional and non-exhaustive. The definitive figures will be available in the fall and will inevitably be higher.

\*\*Provisional data estimated by the CNC.

\*\*\*Berlinale, Busan, Cannes, Rotterdam, San Sebastián, Sundance, Toronto, and Venice.

# THE YEAR OF FRENCH CINEMA ON THE INTERNATIONAL MARKETPLACE

In 2020, French cinema experienced an unprecedented year, losing nearly 70% of international box office receipts. But despite most key indicators being in the red, French cinema preserved a strong foothold in theaters and festivals abroad.

Since its invention, cinema has been faced with the advent of new technologies, changing audience habits, evolutions in the industry itself, and social and political phenomena which have influenced production, distribution, and exhibition. In 2020, it was confronted with an unprecedented health crisis. For the first time in history, practically all the world's movie theaters were closed. Films shoots were suspended. Festivals and markets were cancelled, postponed, or switched to a digital format. Distributors had to revise their release schedules, some opting to go straight to VOD. Exhibitors organized drive-in and outdoor screenings, or streaming events. This unprecedented crisis forced the sector to turn more towards digital channels, the only window that allows industry professionals to remain in contact and lets films reach an audience, which in turns has boosted the growth of online platforms and fueled the debate on the chronology of release windows. The reopening of cinemas a few months later showed that spectators had not lost their appetite for the movie theater, since admissions climbed continually until the end of October when the second wave of the pandemic hit.

So how has international box office for French cinema fared through all this? It is clear that it has suffered from the absence of the kind of major hit which has driven the market recently, the loss of theatrical admission for films which went direct to VOD, the downturn in emerging markets (notably China) where it often struggled to reach its audience, and by independent stakeholders becoming weakened up against the major groups. UniFrance

has never previously recorded foreign admissions of just 13.7 million (since 2011, the annual average is 72.7 million, or 42.5 million if the extraordinary hits selling more than 10 million tickets are extrapolated). That said, Gallic cinema has managed to draw on the richness and variety of its offer to retain its place in the global market. More than 600 different films were screened in one form or another, and there were more than 1,300 theatrical releases, 50 of which made it into the local top 3. The absence of Hollywood blockbusters left a gap which less-high-profile output from other countries, including France, helped fill. With the exception of French-speaking territories on its doorstep, French films, unlike US films, are never released day-and-date worldwide, or not even over a short interval. As such, distributors and exhibitors could look to French titles to offer audiences something fresh.

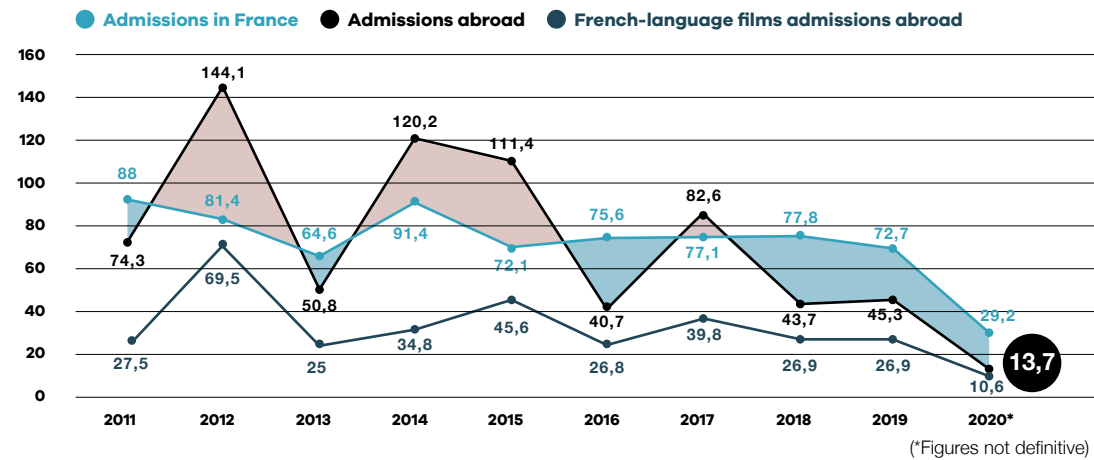
For the first time in 10 years, French-language productions accounted for more than three-quarters of French cinema ticket sales abroad, a ratio that could be found even in regions which are traditionally below the bar of 50%. No foreign-language film was among the 10 biggest hits that were majority-French productions. Two titles attracted more than 1 million admissions in 2020, both minority-French productions, and pushed up the share of such coproductions to 30.5% (compared to 23.2% on average). The top 10 in 2020 accounted for half the total admissions for the year. Comedy, drama, and animation remained the three most popular genres. Europe as a whole accounted for three-quarters

of all ticket sales for French films, while other regions (excluding Asia) each totaled fewer than 1 million. Three countries recorded more than 1 million admissions – Russia, Spain, and Italy – while another 15 territories saw a fall in admissions of less than 50% compared to 2019.

We don't yet know when the situation will improve to allow the whole sector to recover, but the assets inherent in French cinema are clear: Its rich and diversified offer, the high number of coproductions, solid infrastructure, a constant and sustained presence at festivals and other events (163 films and 226 selections in the 8 major international festivals, with one in five films flying the French flag), and a tissue of French professionals working to ensure production and distribution, who are cooperating with foreign executives, many of whom are very keen on all things French. French cinema has not given up the fight, but remains a force to reckoned with on the international stage.

**Bye Bye Morons, Calamity, Delete History, How to be a Good Wife, Mama Weed, Night Shift, Petit vampire, Poly, Summer of 85, Under the Stars of Paris and Yakari, A Spectacular Journey** will continue their international roll-out in 2021, and a fresh batch of films will enter the fray, including **Aline, Eiffel, French Tech, Gagarine, How I Became a Super Hero, OSS 117: From Africa With Love, Skies of Lebanon, Spring Blossom, The Big Hit, The Last Journey of Paul W. R., The Rose Maker, The Speech, and The Wolf and the Lion.**

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

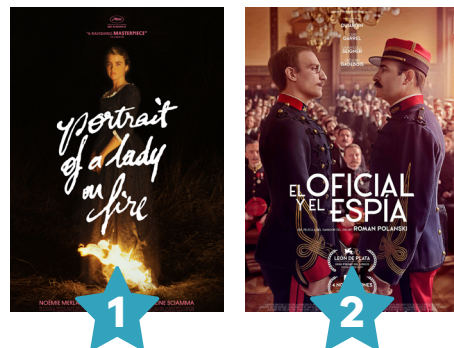


## THE YEAR'S BIGGEST HITS AT THE INTERNATIONAL BOX OFFICE

### TOP 10 MAJORITY-FRENCH FILMS ABROAD IN 2020 BY ADMISSIONS

#	Film (International sales agent / Executive producer)	Admissions abroad in 2020 (million)	Receipts abroad in 2020 (million €)	Cumulative admissions abroad to 31/12/2020 (million)	Cumulative receipts abroad to 31/12/2020 (million €)	Territories
1	<b>Portrait of a Lady on Fire</b> (mk2 films / Lilies Films)	0.97	7.06	1.47	10.8	40
2	<b>An Officer and a Spy</b> (Playtime / Légende, RP Productions)	0.73	4.5	1.41	8.97	27
3	<b>Les Misérables</b> (Wild Bunch International / SRAB Films)	0.57	3.86	0.67	4.64	48
4	<b>The Specials</b> (Gaumont / Quad Cinéma, Ten Cinéma)	0.54	3.83	0.88	6.53	34
5	<b>La Belle Époque</b> (Pathé Films / Les Films du Kiosque)	0.44	2.75	0.96	6.44	36
6	<b>Spread Your Wings</b> (SND / Canopée Productions, Radar Films, SND)	0.27	1.26	0.35	1.85	17
7	<b>The Translators</b> (Wild Bunch International / Trésor Films)	0.26	1.8	0.28	1.87	17
8	<b>The Truth</b> (Wild Bunch International / 3B Productions)	0.25	1.86	0.66	5.11	36
9	<b>Arab Blues</b> (mk2 films / Kazak Productions)	0.23	1.67	0.23	1.67	20
10	<b>Yakari, A Spectacular Journey</b> (Bac Films Distribution / Dargaud Films)	0.19	1.54	0.19	1.54	13

(\*Figures not definitive)



The year 2020 began with *An Officer and a Spy* selling more than 200,000 tickets in Spain, its second-best foreign performance after Italy (547,000 admissions). In January, the film's total foreign ticket sales crossed the 1-million barrier. The following month, *Portrait of a Lady on Fire* achieved the same, becoming the biggest majority-French hit of the year outside of France. It managed to combine critical acclaim and popular success, winning over markets that traditionally do not embrace French-language fare. The film sold more tickets in the United States (410,000) than in France (312,000), also becoming the biggest French-language drama of the past five years in South Korea (150,000) and selling more than 50,000 tickets in the UK on its launch. *The Specials* drew 150,000 admissions in the Netherlands, along with 100,000 in Spain and 90,000 in Russia.

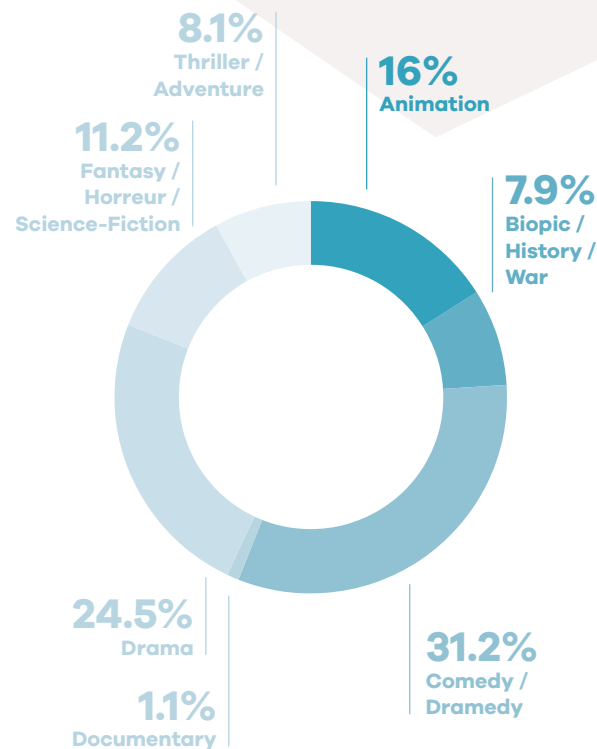
Then movie theaters gradually started to be shut down across the five continents. It was, therefore, on the few markets that remained active – mainly in Asia – where French films enjoyed some often-unexpected good box office performance. *Les Misérables* was a smash in Hong Kong (61,000 admissions), making it the top-selling French-language production since *The Intouchables*. In South Korea, *La Belle Époque* clocked up a very respectable 66,000 admissions, taking second spot at the local box office on the week of its release with a 13% market share.

The third phase was the gradual reopening of cinemas around the world, ahead of another shutdown that was introduced in November. A French presence was ensured by films continuing their international rollout, along with some new releases.

The former group included *The Truth*, which came out in the Netherlands on the day theaters reopened and registered the best per-screen average of the week, and *The Translators*, which was #1 in Greece and Australia (among limited releases) on its launch.

Major successes in the second group include three comedies. *How to Be a Good Wife* debuted in the top 3 in four foreign territories, *Mama Weed* took the title of biggest hit of the year in Germany, while *Arab Blues* helped to relaunch admissions in European markets, totaling some 230,000 admissions. One should also point out the key role played by animation, driven by *SamSam* and *Yakari*, *A Spectacular Journey*, and the continued rollout of *Terra Willy* (leading French film in 2020 in Oceania, with 72,000 admissions), plus two minority-coproductions, *Vic the Viking* and *Bigfoot Family*. The latter sold 670,000 tickets in Russia, 200,000 in the Netherlands, and 100,000 in Denmark, and is the only French film along with *Pinocchio* (minority) to have recorded 1 million admissions since the start of the year.

## BREAKDOWN OF FRENCH FILMS ADMISSIONS ABROAD IN 2020 BY GENRE



(\*Figures not definitive)



### COMEDY

As in 2018 and 2019, comedy emerges as the genre which sells the most tickets outside France, accounting for a third of the annual total (4.27 million). Europe accounted for 79.4% of this (34% of total ticket sales for the region). *The Specials* was the only film which drew more than half-a-million admissions, while a further 10 movies sold more than 100,000 tickets, including *Arab Blues*, *La Belle Époque*, *Mama Weed*, *The Best is Yet to Come*, and *The Mystery of Henri Pick*.



### DRAMA

Drama held onto second place on the podium (3.35 million). This genre comprises the biggest number of titles on release (225, compared to 208 comedies), 4 of which were on screens in more than 30 territories. *Portrait of a Lady on Fire* is the only film approaching 1 million admissions, while another 3 sold more than 100,000 tickets (*The Truth*, *Les Misérables* and *Sorry We Missed You*, a minority-French production). Drama posted a record share of 64.5% in North America, and was also leader in Asia (33.3%).



### OTHER GENRES

After a poor year in 2019, the fantastic/horror/science-fiction genre was the only one that showed an increase on the previous year (up 15.6%), largely thanks to the million-selling *Pinocchio*, a minority coproduction. The biopic/history/war genre was driven by *An Officer and a Spy*, while documentary admissions saw a tenfold drop in admissions. In the absence of any high-selling titles like *Anna* and *Mia and the White Lion*, the thriller/adventure genre did not reach the same heights as in 2019, the best performance being *Spread Your Wings* with 265,000 admissions.



### ANIMATION

Having accounted for an average of 10% of foreign admissions for French cinema since 2011, animation saw its share reach 16% in 2020. This was driven by *Bigfoot Family* (minority), which drew 1.3 million admissions, and 4 other films which attracted more than 100,000 each (*SamSam*, *Terra Willy*, *Vic the Viking*, minority, and *Yakari*, *A Spectacular Journey*). Animation garnered almost half its annual admissions in central and eastern Europe (36.5% of total admissions in the region) and was also notable for the performance of *Terra Willy*, with 24% of French ticket sales in Oceania.



# BREAKDOWN OF FRENCH FILMS ADMISSIONS ABROAD IN 2020 BY REGION

## TOP 5 TERRITORIES IN 2020 BY ADMISSIONS TO FRENCH FILMS

#	Territory	Admissions (million)	Admissions 2020 vs Admissions 2019	Receipts (million €)
1	Russia	1.46	-50.7%	4.29
2	Spain	1.42	-60.7%	8.38
3	Italy	1.03	-76.6%	5.67
4	Germany	0.95	-77.2%	7.33
5	Netherlands	0.81	-26.5%	7.12

(\*Figures not definitive)

## BOX OFFICE HIGHLIGHTS

In the United States, *Portrait of a Lady on Fire* took \$1m in receipts in just 10 days, a feat not seen since *Coco Before Chanel* in 2011

In South Korea, *La Belle Époque* opened on the biggest number of screens outside France (463)

*Meet the Malawas* topped the box office in Portugal for 3 weeks

On its week of release, *The Translators* was in the top 5 in Greece, which was entirely made up of French productions

In Russia, *The Specials* opened in the same number of theaters as *C'est la vie* in 2018 (270)

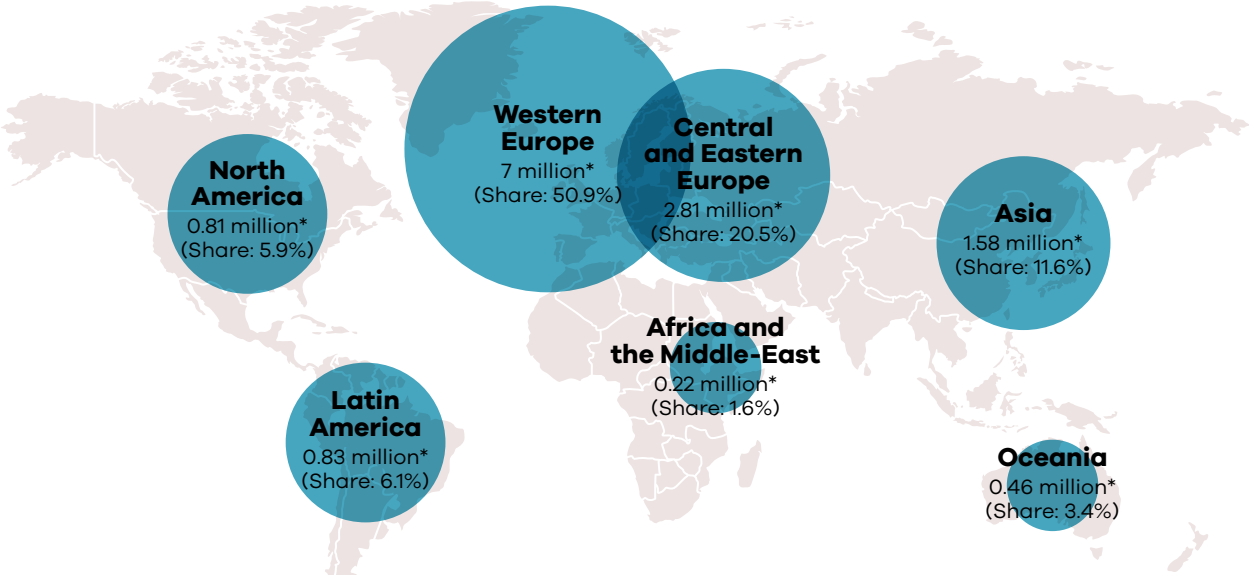
*How to be a Good Wife* opened in second place at the Polish box office

*Les Misérables* and *Proxima* were screened in more than 130 UK cinemas on their launch

*Who You Think I Am* recorded its best foreign performance in Mexico, with 71,000 admissions

*Yakari, A Spectacular Journey* was the only film to attract 100,000 admissions on its launch in Germany

Thanks to the success of her latest film, the three previous works by *Céline Sciamma* are being released for the first time in South Korea



For the fifth consecutive year, **western Europe** remained the leading region for the export of French films. It accounted for half of all admissions for French cinema during the period. Two territories in the region sold more than 1 million tickets, 6 of them were in the worldwide top 10 for the year in terms of number admissions, and 6 in the top 10 in terms of number of releases. Ticket sales for French productions posted their lowest falls compared to 2019 in Denmark (-3.9%), the Netherlands (-26.5%), and Iceland (-28.7%). The three biggest majority-French hits in the region were *An Officer and a Spy* (490,000 admissions), *The Specials* (320,000), and *Les Misérables* (262,000).

**Central and eastern Europe** remained in second place and its market share of 20.5% is the highest in the past decade. Russia was the only territory to clock more than 1 million admissions, ousting Italy as worldwide number-one. Russia is the only country in the region to feature in the top 10 in terms of number of releases, while Poland remained in the top 10 in terms of admissions. Croatia and Lithuania posted the lowest falls in terms of ticket sales (-48.1% and -31.5% respectively) and new releases (+4.3% and -27.9%). *Bigfoot Family* was the uncontested biggest hit with 792,000 admissions, helping to drive the share of minority productions up to 42.8% (29.3% on average over the past 10 years).

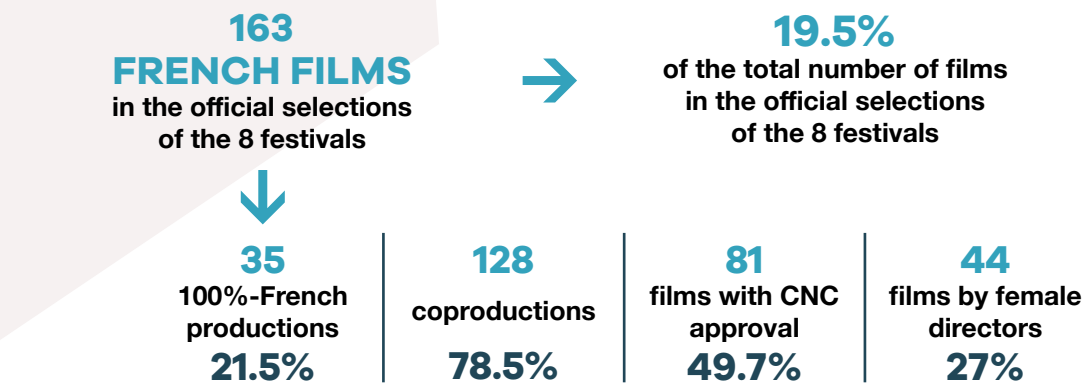
After three years, **Asia** returned to the top-three export regions for French cinema. Previously, growth in the region came from China, but in 2020 it was driven by certain markets which saw limited closures of theaters.

South Korea thus became the leading territory in the region for French film admissions, 9<sup>th</sup> worldwide. Cinema-going there was less affected by the crisis in Hong Kong (-29.1%), as illustrated by the huge success of *Les Misérables*. Japan and Taiwan entered the global top 10 in terms of number of releases (50 and 43 new releases respectively), but only one picture drew more than 100,000 admissions: *Portrait of a Lady on Fire*.

The four other regions, despite being all very different, all shared the same disappointing achievement of recording fewer than 1 million total admissions for French cinema in 2020. This is often the case for **Africa and the Middle East** and **Oceania**, the first weakened by the sudden shutdown of its 2 most dynamic marketplaces, Israel and Morocco, while the latter is the region that posted the lowest overall drop compared to 2019 (-42.2%). The American continent saw theaters shut down for longer than elsewhere, and the markets there are showing more difficulty in resuming. **North America** is the only one of these four regions to see one of its territories among the top 10 in worldwide admissions (United States and English-speaking Canada, 8<sup>th</sup> place), while Quebec was among the top 10 in terms of releases (53). It also clocked more than 420,000 admissions for *Portrait of a Lady on Fire*, despite an overall 80.6% drop in admissions to French movies. **Latin America** registered a sharp drop in ticket sales for Gallic cinema (-83%), dropping out of the top 3 regions but still ahead of North America.

(\*Figures not definitive)

# FRENCH FILMS AT MAJOR INTERNATIONAL FESTIVALS IN 2020



## TOP 5 COUNTRIES WITH WHICH THE SELECTED FRENCH FILMS IN 2020 WERE COPRODUCED

#	Country	Films	
		Number	Share
1	Belgium	34	20.9%
2	Germany	25	15.3%
3	Brazil, UK	9	5.5%
4	Luxembourg, Netherlands, Qatar, Spain, Sweden	7	4.3%
5	Canada	6	3.7%
Other countries (63)		89	54.6%
France only		35	21.5%
Total		163	

## TOP 5 LANGUAGES SPOKEN IN THE SELECTED FRENCH FILMS IN 2020

#	Language	Films	
		Number	Share
1	French	84	51.5%
2	English	46	28.2%
3	Arabic	19	11.7%
4	Spanish	16	9.8%
5	German	12	7.4%
Other languages (53)		79	48.5%
Total		163	

### METHODOLOGICAL NOTES:

★ The 10 festivals studied were: The Berlin International Film Festival (Berlinale), the Buenos Aires International Festival of Independent Cinema (BAFICI), the Busan International Film Festival, the Festival de Cannes, the Locarno International Film Festival, the Rotterdam International Film Festival, the San Sebastián International Film Festival, the Sundance Film Festival,

the Toronto International Film Festival (TIFF), and the Venice International Film Festival (Mostra). In 2020, BAFICI wasn't held, and Locarno proposed a selection of work-in-progress called *The Films After Tomorrow*. ★ Titles considered as French films have a French (co)producer (and so are not only those films with CNC approval). Only recent films, i.e. those made not more than two years ago, are taken into account.

★ Films with several nationalities, or made in several languages, or by several directors, are counted as many times as the number of nationalities, filming languages, or directors. ★ For the sake of harmonization of information provided by each festival, the attribution of nationality and languages spoken has been done using IMDb data.

## BREAKDOWN OF FRENCH FILMS SELECTED IN 2020 BY FESTIVAL AND BY COUNTRY OF PRODUCTION

Berlinale		Busan		Cannes		Rotterdam	
Germany	42	South Korea	41	France	44	France	53
France	33	France	34	Belgium	11	Germany	24
USA	26	USA	14	USA	6	USA	24
Brazil	13	Japan	12	United Kingdom	5	Belgium	22
United Kingdom	13	Germany	11	Italy	4	Netherlands	19
Total	168	Total	169	Total	69	Total	235
San Sebastián		Sundance		Toronto		Venice	
Spain	30	USA	83	USA	21	Italy	30
France	21	United Kingdom	19	Canada	12	France	20
USA	11	France	7	France	12	USA	14
United Kingdom	10	Germany	6	United Kingdom	7	Belgium	8
Argentina	7	Canada	5	Germany	5	Germany	7
Total	89	Total	121	Total	57	Total	92

In 2020, the festivals at the start of the year (Berlinale, Rotterdam, and Sundance) which were able to take place as usual were in stark contrast to the subsequent ones, which were either cancelled (BAFICI and Cannes, although the latter did announce a label), opted for a different format (Locarno), or else cut back on the number of sections and films (Busan, San Sebastián, Toronto, and Venice). This year, the predominance of local films or those from neighboring countries in each festival can mainly be explained by the limitations on movement

imposed by the health emergency. Despite this, French cinema remains a key ingredient, the second most widely represented country by number of titles (only 5 behind the leader, the United States), and the leading territory in terms of selections (226). One of its strengths lies in the wealth of coproductions, which makes it multicultural and multi-linguistic, allowing French films to circulate more between events (1.38 selections on average, the best ratio in 2020).

## LIST OF MAJOR AWARDS WON BY FRENCH FILMS IN THE 8 FESTIVALS IN 2020

Berlinale	
🏆 Silver Bear for Best Actress	Paula Beer for <i>Undine</i> by Christian Petzold
🏆 The Silver Bear – 70 <sup>th</sup> Berlinale	<i>Delete History</i> by Benoît Delépine and Gustave Kervern
🏆 Berlinale Documentary Award	<i>Irradiated</i> by Rithy Panh

San Sebastián	
🏆 Golden Shell for Best Film	<i>Beginning</i> by Dea Kulumbegashvili
🏆 Silver Shell for Best Director	Dea Kulumbegashvili for <i>Beginning</i>
🏆 Silver Shell for Best Actress	la Sukhitasvili for <i>Beginning</i> by Dea Kulumbegashvili
🏆 Jury Prize for Best Screenplay	<i>Beginning</i> by Dea Kulumbegashvili

Sundance	
🏆 World Cinema Grand Jury Prize: Documentary	<i>Epicentro</i> by Hubert Sauper
🏆 World Cinema Grand Jury Prize: Dramatic	<i>Yalda, a Night for Forgiveness</i> by Massoud Bakhshi
🏆 Directing Award: World Cinema Dramatic	<i>Cuties</i> by Maïmouna Doucouré

Venice	
🏆 Silver Lion – Grand Jury Prize	<i>New Order</i> by Michel Franco
🏆 Orizzonti Award for Best Actor	Yahya Mahayni for <i>The Man Who Sold His Skin</i> by Kaouther Ben Hania
🏆 Orizzonti Award for Best Actress	Khansa Batma for <i>Zanka Contact</i> de Ismaël El Iraki



**GILLES RENOARD**

Deputy Director  
Head of Festivals, Markets  
and Surveys Department  
gilles.renouard@unifrance.org  
T +33 1 47 53 27 23

**ANDREA SPONCHIADO**

Economic Data  
and Reports Manager  
andrea.sponchiado@unifrance.org  
T +33 1 47 53 27 07

**BETTY BOUSQUET**

Publicist  
betty.bousquet@unifrance.org  
T +33 1 47 53 27 37  
C +33 6 85 95 57 61

**UNIFRANCE**

13, rue Henner, 75009 Paris  
T +33 1 47 53 95 80

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