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Unifrance Rendez-Vous in Paris

24th edition — January 11 > 17, 2022

FRENCH FILMS ON THE INTERNATIONAL MARKET PLACE,
AT FESTIVALS AND ON SVOD PLATFORMS IN 2021

Results for French films on the international marketplace in 2021

14.8*
million admissions

up 8%* compared to the provisional figure
in 2020 announced in January 2021

Note: In France, French films generated
39.2** million admissions in 2021,
up 34.2%** compared to 2020

91.4*
million euros
in receipts

up 5.5%* compared to the provisional figure
in 2020 announced in January 2021

In 2021, French cinema saw international box office unchanged
and retained its place in foreign markets and festivals.



7.3* million admissions (49.5%* of the total)

for majority-French productions

(9.5 million and 69.5% in January 2021, down 23.2%*)



7.4* million admissions (50.3%* of the total)

for French-language films

(10.6 million and 77.6% in January 2021, down 30.2%*)



719* French films on release in foreign theaters

(611 in January 2021, up 17.7%*)



1,527* releases of French films

(1,398 in January 2021, up 9.2%*)



**2* French films sold more than 1 million tickets abroad and 24*
more than 100,000**

(2 and 28 in January 2021, 0* and down 4*)



China becomes the leading territory in terms of admissions

for French films in 2021, ahead of Russia and Spain*



**202 French films were selected across 10 major international
film festivals*** and accounted for 21.7% of the films presented**

(163 and 19.5% in 2020, up 23.9%)



**Almost 2,900 French films were available on SVOD foreign platforms
and accounted for 4.8% of listings**

(almost 2,700 and 3.5% in 2020, up 7.4%)

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

The year of French cinema on the international marketplace

In 2021, French cinema on the international marketplace showed performance similar to that of the previous year. While it conserved its position in theaters and strengthened its presence at festivals and on SVOD platforms, analysis of the figures reveals a geographical breakdown of the offer and markets very different to 2020.

As the slow recovery process was starting to bear fruit, the film sector suffered another shutdown in October and November 2020 due to an upsurge in the pandemic. For the first time in history, audiences almost throughout the world were deprived of cinema during the end-of-year holidays. What no one could then imagine was that this situation would last for many long months. It was not until May or June 2021 that most countries eased restrictions on cinema-going. Compared to 2020, one can observe less homogeneity in the measures applied in various geographical regions. In spring, just as the prospect of a relaxation in measures was emerging in Europe, restrictions were tightened in Asia and Latin America. In August and September, when the recovery was underway in Europe, cinemas were closing in Oceania. Whilst trying to avoid a total halt in theatrical exhibition, the regulations covering movie houses were adjusted according to the evolution of the pandemic in each territory. This fragmented picture made planning and the implementation of international launch strategies for films considerably more complicated.

So how did French cinema fare? Box office receipts and the number of films on release were higher than the previous year. And yet, if one analyzes the results closely, one can see that 2021 is very different to 2020. The latter was notable for the domination of majority-French productions (69.5% of all admissions) and those in the French language (77.6%). By contrast, 2021 marked the third time since 2000 (after 2006 and 2011) to be driven by minority-French productions, which accounted for more than half of all admissions, with a 50.5% share. During the first six months of the year, four films were largely responsible for maintaining a French presence on foreign screens, including **The Father** and **Pinocchio**, the only two which crossed the symbolic milestone of one million ticket sales in 2021. A more familiar phenomenon which is encapsulated in the years when EuropaCorp enjoyed a major hit, films not in the French language also accounted for one in two admissions, driven by **The Wolf and the Lion**. The reopening of French cinemas after more than six months of closure and the staging of the Festival de Cannes helped to relaunch the Gallic film

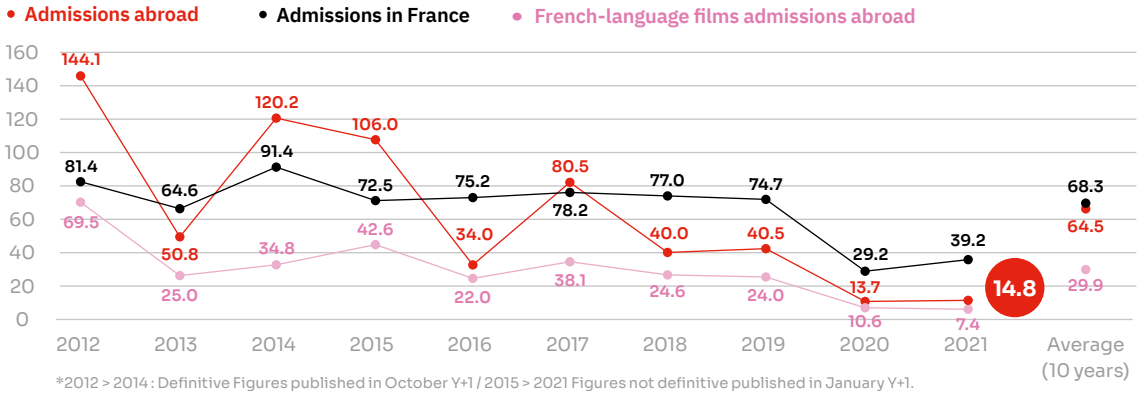
sector, especially majority-French productions which began their international roll-out over the summer. This resumption of activity also benefitted the Hollywood studios, with the release of some highly-anticipated blockbusters which in turn increased the competition for screens and audiences. Their absence in 2020 had left a void, which provided an opportunity for the movie output from other countries, including France.

The breakdown of admissions by genre showed the same top three (drama, comedy, animation), but the breakdown by geographical region was profoundly different. Europe, which accounted for half of all spectators in 2020, saw admissions drop by more than 1.5 million, losing market share to other regions apart from Africa and the Middle East, which also fell. China became the leading market in terms of admissions for French cinema, while ticket sales for French films were up 90% year-on-year across Asia and Latin America, and those in Oceania were up 80%. With the exception of the latter continent, these increases were mainly due to minority productions and films not in French.

Once again, the future remains uncertain and unpredictable, but French cinema maintains its presence on the international stage thanks to its rich and diversified offer, the high level of coproductions, its solid cinematic heritage, a sustained presence at festivals and on streaming platforms, and a tissue of French film industry professionals working on both production and distribution in close collaboration with foreign executives, many of whom have a great appreciation of all things French.

Aline – The Voice of Love, Around the World in 80 Days, Delicious, Happening, Lost Illusions, Pil's Adventures and **The Wolf and the Lion**, among others, will continue their international roll-out in 2022, and a fresh batch of films will enter the fray, including **Full Time, Notre-Dame on Fire, Paris, 13th District, Serial (Bad) Weddings 3, Superwho?, The Velvet Queen, Vicky and her Mystery, Vortex**, and **Waiting for Bojangles**.

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 films abroad in 2021 by admissions*

#	Film (International sales agent / Executive producer)	Admissions abroad in 2021 (million)	Receipts abroad in 2021 (million €)	Cumulative admissions abroad to 31/12/2021 (million)	Cumulative receipts abroad to 31/12/2021 (million €)	Territories
1	Around the World in 80 Days (StudioCanal / Cottonwood Media)	0.63	3.04	0.63	3.04	17
2	The Wolf and the Lion** (StudioCanal / Galatée Films, Mai-Juin Productions)	0.50	2.53	0.50	2.53	16
3	Titane (Wild Bunch International / Kazak Productions)	0.38	2.73	0.38	2.73	32
4	Annette (Kinology / CG Cinéma)	0.30	1.86	0.30	1.86	43
5	Eiffel (Pathé Films / VVZ Production)	0.30	2.19	0.30	2.19	20
6	Kaamelott (SND / Regular Production)	0.28	2.66	0.28	2.66	6
7	Benedetta (Pathé Films / SBS Productions)	0.19	1.52	0.19	1.52	29
8	Family Swap (Gaumont / Karé Productions)	0.18	1.11	0.18	1.11	9
9	The Rose Maker (Charades / Estrella Productions)	0.16	1.24	0.16	1.25	19
10	Delicious (SND / Nord-Ouest Films)	0.16	1.15	0.16	1.15	11

*Figures not definitive. **Film not in the French language.

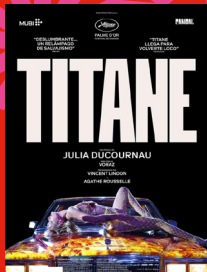
TOP *5



*1



*2



*3



*4



*5

In the first six months of 2021, four minority-French productions were driving ticket sales for French cinema beyond French borders: **The Father**, **Pinocchio**, **Bigfoot Family**, and **Cinema Paradiso**, which was on screens for the first time in China, 30 years after its initial release. Among majority-French films, **My Donkey**, **My Lover & I** was the only title to accumulate more than 100,000 foreign admissions, notably in Australia and New Zealand (212,000 ticket sales outside France since 2020).

It was not until July that another French hit came along, when **Kaamelott** took French-speaking markets by storm (281,000 total admissions, including 121,000 in Belgium), providing Gallic cinema with its best opening numbers since **Serial (Bad) Weddings 2** in 2019. A few weeks later, **OSS 117: From Africa With Love** took up the baton, garnering 156,000 admissions. The reopening of French movie theaters and the Festival de Cannes saw a fresh batch of films on the market, the first of these to enjoy an international release being **Annette**. This picture

has since rolled out in some 40 territories, selling almost 50,000 tickets in Spain and Russia and 41,000 in South Korea on its way to 304,000 total foreign admissions.

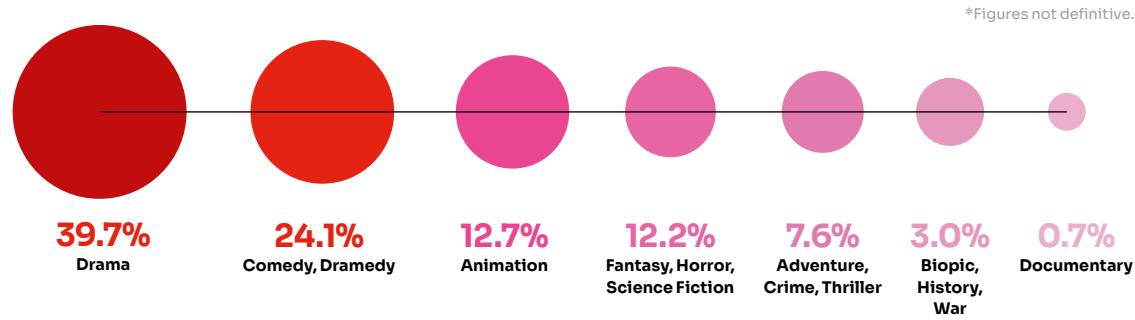
At the start of September, **Around the World in 80 Days** burst onto screens in several European markets: 254,000 admissions in Russia, 103,000 in Italy, and more than 73,000 in the UK and Ireland (631,000 in total, mainly in Europe). In Spain, **Family Swap** drew a solid audience with 127,000 ticket sales. Meanwhile, **Eiffel** bowed in Australia with 57,000 admissions, before going onto to sell 63,000 tickets in Benelux and a further 47,000 Russia, taking its worldwide cumulated admissions to 302,000.

October was notable for the roll-out of the highly anticipated Palme d'or winner **Titane**, which took more than \$1M at the North American box office in just 10 days. Launched on more than 500 screens, it drew over 150,000 admissions there, plus a further 40,000 in Spain, and 25,000 in both Germany and Italy, for a cumulated total of 377,000. Shortly after, **My Son** crossed the barrier of 100,000

admissions on the week of its release in Russia, reaching 136,000 at the end of its run.

Highly anticipated after the worldwide success of **Mia and the White Lion** two years ago (4.5 million admissions), **The Wolf and the Lion** got off to a good start on its international roll-out. Ticket sales in Poland totaled a healthy 198,000, while Spain clocked 140,000 admissions. The adventure film is already the most successful French movie of the year in many countries of Eastern Europe, and it has racked up 500,000 admissions.

Breakdown of French films admissions abroad in 2021 by genre



DRAMA

Drama emerged as the genre which attracted the greatest number of admissions outside France (5.88 million, up 75.8% compared to 2020). The only genre to generate more than 5 million ticket sales, its market share went up 15 points in one year and exceeded 40% in Asia, Western Europe, and Oceania. This performance was driven by **The Father**, a minority coproduction, which alone sold 3.8 million tickets. This genre encompassed the largest number of titles (271), seven of which were released in more than 20 territories.



COMEDY

After two years as the top-selling genre, comedy has slipped into second place, despite 239 productions on release. Admissions fell year-on-year by 16.4% and its market share dropped by 7 points (3.57 million admissions). Nonetheless, it still accounted for one in three ticket sales in Western Europe and Oceania. No single title was distributed in more than 30 markets, while nine garnered more than 100,000 admissions, including **Kaamelott** (281,000) and **Family Swap** (182,000).



ANIMATION

As usual, animation was third place this year, but admissions fell 13.9% compared to 2020 (1.86 million). Released in more than 30 territories, **Bigfoot Family**, a minority-French production, was firmly out front, accounting for one in two ticket sales. The leading majority-French film in this category in 2021 was **Around the World in 80 Days**, followed by **Yakari – A Spectacular Journey**. Animation accounted for 46.8% of French admissions in Africa and the Middle East and 32.6% in Eastern Europe.



OTHER GENRES

Thanks to the continued roll-out of the minority-French **Pinocchio**, and the arrival of **Titane**, fantasy/horror/science-fiction was the only other genre to accumulate more than 1.5 million admissions, up 18.6% on the previous year. Despite the success of **Eiffel**, ticket sales for biopics fell by 59.3%. Documentary saw admissions drop by a third, while the adventure/crime/thriller genre was a long way from its glory days, but was up 2.9% thanks to **My Son** and **The Wolf and the Lion**.

Breakdown of French films admissions abroad in 2021 by region

Top 5 territories in 2021 by admissions to French films

#	Territory	Admissions (million)	Admissions 2021 vs Admissions 2020	Receipts (million €)
1	China	2.22	+908.2%	10.6
2	Russia	1.29	-11.3%	4.30
3	Spain	1.09	-23.5%	6.39
4	Mexico	0.88	+116.8%	2.33
5	Belgium & Luxembourg	0.82	+22.0%	6.93

*Figures not definitive.

Box office highlights

In South Korea and Russia, **Annette** bowed on the most screens outside of France (more than 300).

In Russia, **Around the World in 80 Days** bowed on more than 1,100 screens.

Eiffel, Happening, My Son, Simple Passion, and **The Rose Maker** all began their international roll-out before being released in France.

In Spain, **Family Swap** attracted the most admissions on its third week on release.

In Quebec, **Kaamelott** achieved the 8th best opening for a majority-French, French-language production in the past decade.

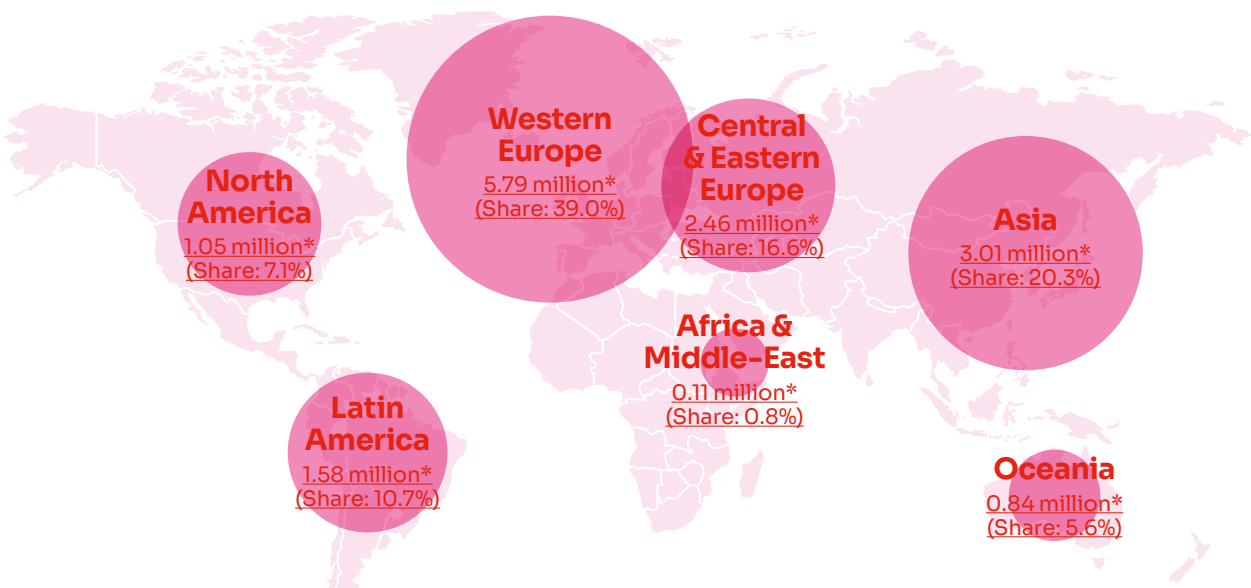
In New Zealand, **My Donkey, My Lover & I** became the biggest French-language hit since **Intouchables** ten years ago.

My Son drew more than 100,000 admissions on its release in Russia and sold three times as many tickets on the international marketplace as in France.

On the week of its release, **The Wolf and the Lion** was in the top 10 in nine foreign territories.

Thanks to **Titane**, a majority-French, French-language production featured in the top 10 in North America, 11 years after **Océans**.

Yakari – A Spectacular Journey featured in the top 10 in Serbia for five consecutive weeks.



For the sixth consecutive year, **Western Europe** was the leading market for the export of French films. The region clocked up more than 5 million admissions, although this was down 17.3% compared to 2020, when the region accounted for more than half of all foreign admissions. Only Spain totaled more than 1 million admissions. Four countries were in the global top 10 for the year in terms of admissions, and six were in the top 10 in terms of number of releases. Ticket sales for French productions were up in Scandinavia, Belgium and Switzerland, stable in Greece, but fell in all the other markets. The majority-productions that drew the most admissions in the region were **Around the World in 80 Days** (283,000) and **Kaamelott** (207,000).

The region where French films recorded the biggest increase in admissions was **Asia** (up 90.5%). This was driven by China, where admissions were up tenfold on 2020 for the six French films on release (including five minority-productions), making it the leading foreign market in 2021 by number of admissions. Japan remained the leading market in the region by number of releases (eighth worldwide). That said, with the exception of some stability in Hong Kong and Singapore, ticket sales for French films fell in other markets across the region. Besides three minority-productions that each sold half-a-million tickets, no majority-French productions sold more than 50,000.

Like the western half of the continent, **Central and Eastern Europe** delivered fewer ticket sales for French cinema than in 2020 (down 12.5%). The only territory which clocked up more than 1 million admissions was Russia, which lost its place as the leading export market but was the only country in the

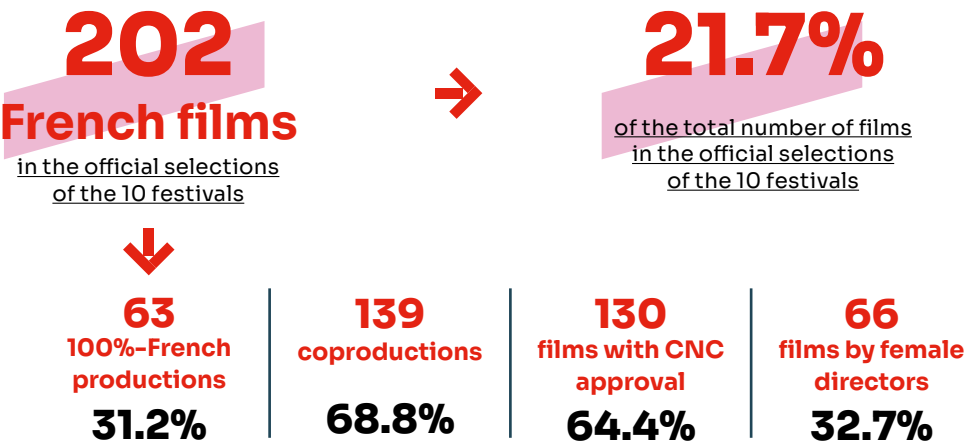
region to feature in the top 10 by number of releases. Meanwhile, Poland remained in the top 10 in terms of admissions. Bosnia-Herzegovina, Bulgaria, Poland and Romania were the only markets which sold more tickets compared to the previous year. Majority-French productions which drew the most admissions in the region were **Around the World in 80 Days** (333,000), **The Wolf and the Lion** (305,000), and **My Son** (147,000).

After a terrible year in 2020, **French cinema recovered somewhat in the Americas**. Admissions were up 90.4% year-on-year in Latin America, and up 29.6% in North America. Mexico and the United States & English-speaking Canada entered the top 10 in terms of admissions, and the latter market, along with Quebec, also featured in the top 10 by number of releases. The upturn in Latin America was largely due to minority-French productions, while the majority-productions **Titane** (170,000 admissions) and **Kaamelott** (74,000) performed well in the northern part of the continent.

With figures from Israel and Morocco still pending, **admissions for French films in Africa & Middle East halved from one year to the next. However, they rose 82.6% in Oceania**, Australia emerging as the tenth biggest market in terms of ticket sales. The surprise hit of 2021 was **My Donkey, My Lover & I**, which drew 107,000 spectators.

*Figures not definitive

French films at major international festivals in 2021



Top 5 countries with which the selected French films in 2021 were coproduced

#	Country	Films	
1	Belgium	35	17.3%
2	Germany	33	16.3%
3	Italy	21	10.4%
4	Switzerland	17	8.4%
5	Qatar	15	7.4%
	Other countries (68)	99	49.0%
	France only		17.3%
	Total	202	

Top 5 languages spoken in the selected French films in 2021

#	Language	Films	
1	French	112	55.4%
2	English	50	24.8%
3	Arab	16	7.9%
	Spanish		
5	Italian	14	6.9%
	Other languages (54)	78	38.6%
	Total	202	

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).
• 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 2021 by festival and by country of production

BAFICI	Berlinale	Busan	Cannes	Locarno
Argentina 54	Germany 31	South Korea 41	France 82	France 19
USA 15	France 18	France 45	Belgium 23	Switzerland 17
Spain 14	USA 13	Germany 23	Germany, USA 20	Germany 13
Brazil, France 11	Canada 9	USA 17	Italy 10	Italy 12
Uruguay 7	Switzerland 7	Japan 15	Qatar, UK 8	USA 9
Total 129	Total 94	Total 182	Total 136	Total 86
Rotterdam	San Sebastián	Sundance	Toronto	Venice
France 13	Spain 34	USA 49	USA 38	Italy 45
USA 11	France 29	France, UK 6	France 31	France 33
Germany, Japan 9	USA 12	Sweden 5	Canada, UK 20	USA 20
Netherlands 6	UK 10	Canada, Denmark 3	Germany 16	UK 11
Brazil, Canada, Denmark 5	Germany 9	Belgium, Germany, India, Norway, Switzerland 2	Belgium 9	Germany 8
Total 104	Total 108	Total 73	Total 127	Total 116

In 2021, after skipping a year due to the pandemic, the festivals in Buenos Aires, Cannes and Locarno were held with audiences. Those held at the start of the year – Berlin, Rotterdam and Sundance – opted for an online or hybrid version. Busan, San Sebastián, Toronto and Venice all benefited from a lull in the pandemic to announce rich line-ups. While the impact of Covid-19 is

still being felt, the year for French cinema was notable for two phenomena: One the one hand, the slowdown in the North America film industry allowed it to emerge as the leading cinema country by number of titles (and festival selections); on the other, for the first time in history, French women directors won the Palme d’Or and the Golden Lion in the same year.

List of major awards won by French films* in the 10 festivals in 2021

Cannes

🏆 Palme d’or
Titane by Julia Ducournau
🏆 Best Director
Leos Carax for **Annette**
🏆 Jury Prize
Ahed’s Knee by Nadav Lapid
🏆 Ensemble Prize (Un Certain Regard)
Good Mother by Hafsia Herzi

Locarno

🏆 Special Jury Prize (Cineasti del presente)
Our Summer by Émilie Aussel

Rotterdam

🏆 Special Jury Prize
A Corsican Summer by Pascal Tagnati
🏆 Youth Jury Award
Night of the Kings by Philippe Lacôte

San Sebastián

🏆 Jury Prize for Best Cinematography
Undercover by Frédéric Jouve
🏆 Audience Award – Best Film
Petite maman by Céline Sciamma
🏆 Audience Award – Best European Film
Between Two Worlds by Emmanuel Carrère
🏆 Zabaltegi – Tabakalera Award
Vortex by Gaspar Noé

Toronto

🏆 People’s Choice Award (Midnight Madness)
Titane by Julia Ducournau

Venice

🏆 Golden Lion for Best Film
Happening by Audrey Diwan
🏆 Orizzonti Award for Best Actress
Laure Calamy for **Full Time** by Éric Gravel
🏆 Orizzonti Award for Best Director
Éric Gravel for **Full Time**

*Majority-French productions with CNC approval.

French films on SVOD platforms abroad in 2021

4.8%

of French films available
on SVOD platforms abroad
in July 2021



almost 2,900
French films

available on SVOD platforms
abroad in July 2021

Top 5 most widely represented national cinemas on SVOD platforms on the international market in 2021

#	Country	Market Share
1	USA	41.8%
2	India	8.4%
3	France	4.8%
4	UK	4.2%
5	Japan	2.3%

In a changing context and one of constant growth, it is reassuring to note that French films are occupying an ever-greater space. In three years, the presence of French productions on streaming platforms worldwide has climbed from 2.4% in 2019 to 3.5% in 2020 before

reaching 4.8% in 2021. The increase in both the number of operators and number of titles on offer has undoubtedly benefitted French films. The pioneering platforms like Netflix and Amazon Prime Video have been steadily increasing the number of acquisitions of French properties, and their market share of the global volume has grown year-on-year. In parallel, local platforms are becoming established and are less oriented towards American movies and provide a greater space for French films, although they acquire fewer titles. It is also gratifying to observe the wide diversity of genres of French films screening on these platforms, as evidenced by the three Gallic films present on the greatest number of platforms: A dramedy (**Monsieur Chocolat**, 22 different SVOD platforms), a thriller (**A Prophet**, 21 platforms), and a fantasy film (**Valerian and the City of a Thousand Planets**, 20).

The trend is thus positive and the margin for growth still significant. Accounting for 4.8% of online catalogs, **French films are in third spot among the most-widely represented national cinema output on these platforms**, behind the United States and India, moving up one spot compared to 2020. One can compare this figure to that of French films presence on cinema screens worldwide, which is 9.9%. One can observe a strong correlation between the presence on local platforms (notably in Italy, Russia, Taiwan, etc.) and the appeal of French films on the big screen. So there are positive prospects in store for the years ahead.

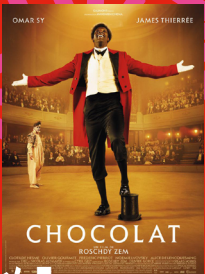
Methodological notes:

• Data from the SVOD UniFrance Indicator 2021 – Study on the place of French films on SVOD platforms worldwide.

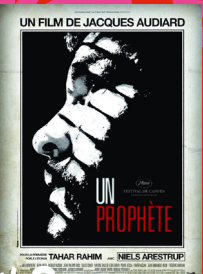
• Source of data: Ampere Analysis
Perimeter: 48 territories (excluding France), 81 SVOD platforms.

TOP *3

The 3 French films
screening on the most
SVOD platforms



*1



*2



*3

Top 10 countries with the greatest share of French films on SVOD platforms in 2021

#	Country	Market Share
1	Italy	7.5%
2	Romania	7.4%
3	Spain	7.4%
4	Estonia	6.9%
5	Taiwan	6.8%
6	Lithuania	6.8%
7	Latvia	6.5%
8	Russia	6.1%
9	Portugal	6.0%
10	Turkey	5.9%

Top 10 SVOD platforms with the greatest share of French films in 2021

#	SVOD Platform	Country	Market Share
1	Curzon Home Cinema	UK	28.4%
2	MUBI	World	22.3%
3	BFI Player	UK	14.6%
4	Globo Play	Brazil, USA	10.6%
5	Film1	Netherlands	9.4%
6	MyVideo	Taiwan	8.2%
7	Okko	Russia	8.1%
8	Mediaset Infinity	Italy	7.7%
9	Sundance Now	USA, Canada	7.6%
10	Catchplay	Taiwan	7.3%

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