Animation films and TV series in Europe
Key figures

Marta Jiménez Pumares
Gilles Fontaine
December 2021

A publication of the European Audiovisual Observatory

European Audiovisual Observatory

COUNCIL OF EUROPE
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Introduction and methodology

- This reports compiles data available at the European Audiovisual Observatory on the production and exploitation in cinemas and in VOD of animation films and audiovisual content produced in Europe. The data is based on the following sources:
  - The Observatory LUMIERE database. LUMIERE tracks the admissions of films released in Europe and in 12 major non-European markets. LUMIERE was also used as a proxy to identify the number of films produced in Europe, with one limit: LUMIERE only includes films released in at least one of the covered countries; therefore films that were produced but not released are not considered.
  - The LUMIEREVOD database. LUMIEREVOD tracks the composition of films and TV content in over 500 European VOD catalogues.
  - In both cases, identifying animation programmes can face limits, in particular when they combine animation and live action. We have used a variety of sources (mainly LUMIERE and IMDb) to establish whether a given programme could be considered as animation.
- This reports also provides new data regarding the production of animation TV content. This data faces a series of methodological limits, which are detailed in slide 14. However, the Observatory hopes that these figures represent a useful first step to bring more transparency to the sector.

Introduction and methodology

- **The data collected for this report depicts a series of characteristics of the European animation sector.**
  - A stable theatrical film segment with individual films performing well in terms of exports in cinemas (in particular thanks to a high share of coproductions) and on video-on-demand (VOD), but comparatively limited in terms of number of films produced and hence a comparatively low share of admissions or presence in VOD catalogues.
  - A TV (and subscription video-on-demand [SVOD]) animation segment which seems to be gaining momentum since 2017/2018 and which shares some characteristics with the animation film segment: high share of coproductions and better circulation than live action fiction.
  - The growth in TV animation production is likely partly driven by web-only animation TV series, primarily on You Tube and other video sharing platforms. The high share of animation programmes on SVOD catalogues will likely drive more demand for European animation TV series but, as of 2019, it probably had a marginal impact on the production volume.
  - Looking at the various indicators presented in this report conveys the impression of a shortage of European animation film and TV content. The recent growth in the production of TV content (and the more qualitative sense of a high number of projects in development) may resolve the gap in the coming years, at least as regards TV animation content.
  - Finally, the European animation production sector appears to be led by France in terms of production volume and by the United Kingdom in terms of theatrical and VOD exploitation.

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The production and theatrical exploitation of animation films

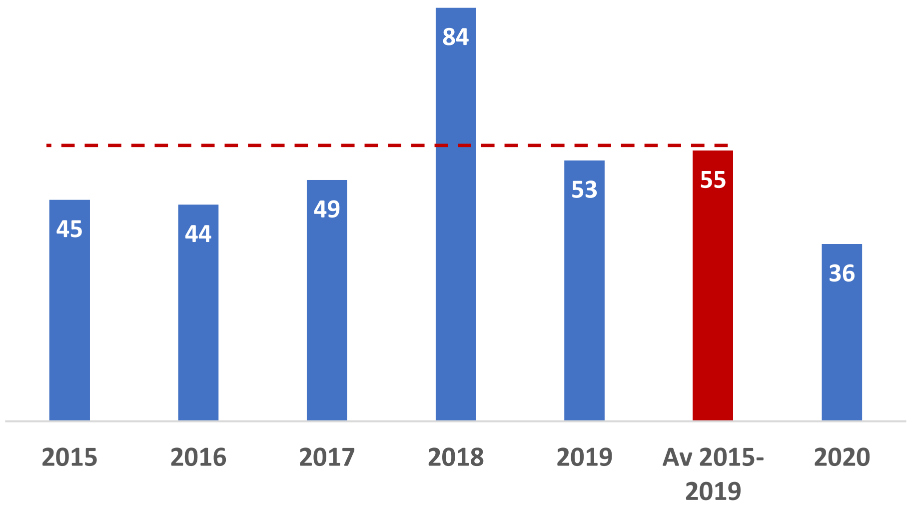
Key findings

- Europe produces around 55 theatrical animation films per year. France, Russia and Germany are the main producing countries.
- Theatrical animation films are significantly more often international coproduction than films of all categories.
- Exports are much more important for the theatrical exploitation of animation films than for films of all categories.
- The United Kingdom, France and Russia get the highest share of admissions to European animation films.
- The top 20 European animation films account for 60% of all admissions to European animation films.
- In Europe, European animation films get a lower market share than films of all categories.
- China is the first non-European market for European animation films.

On average, 55 theatrical animation films produced in Europe each year

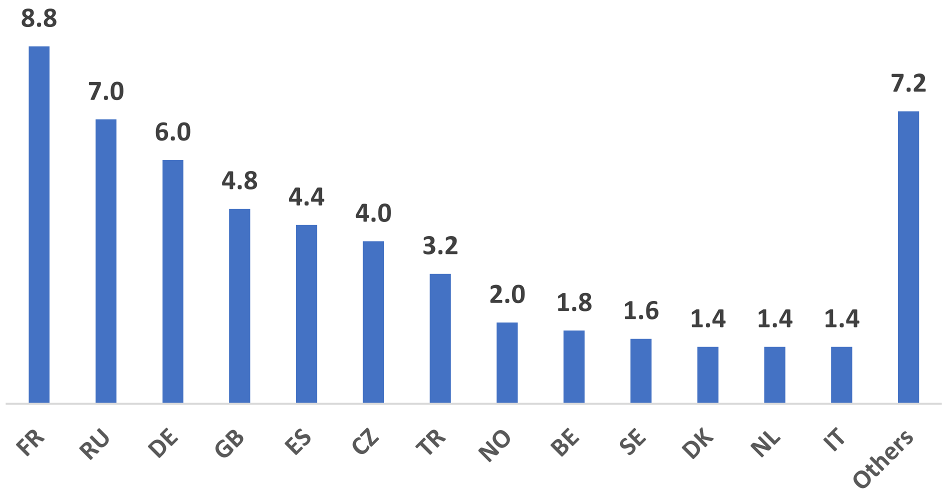
- The lower number of animation films produced in Europe in 2020 should be considered as indicative only. Films indeed only appear in the Observatory LUMIERE database once they are theatrically released. The figure may therefore result from delays in the release of films.
- France and Russia are the two main producers of theatrical animation films.

Number of animation films produced in Europe



Source: European Audiovisual Observatory

Average number of films produced yearly in the period 2015-2019



Source: European Audiovisual Observatory

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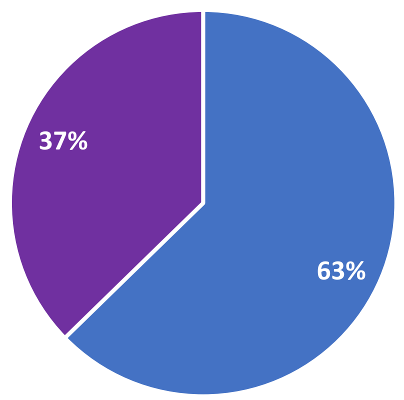
More coproductions in theatrical animation films

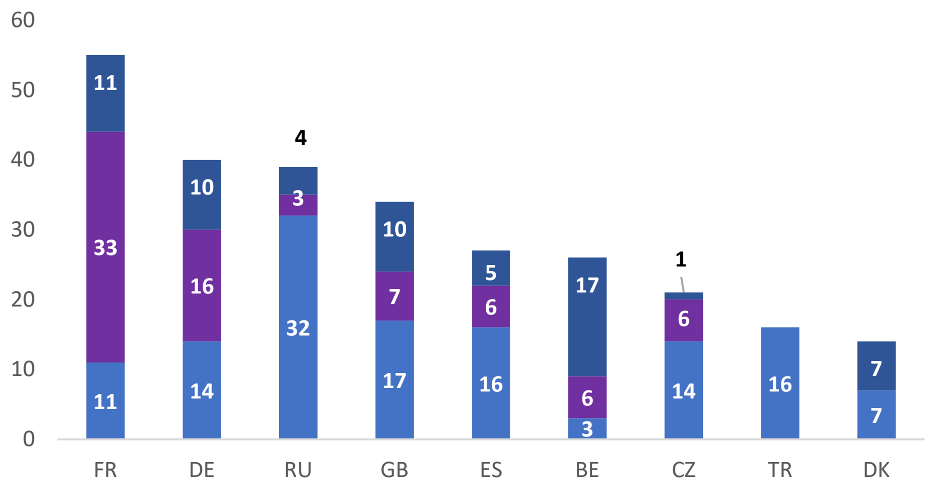
- Coproductions account for 37% of European animation films, to be compared with 22% for all fiction films (2019).
- France, Germany and Belgium stand out as coproductions partners.

Share of coproductions in European animation films (2015-2019)



Source: European Audiovisual Observatory

Major animation film producing countries in Europe including minority coproductions (2015-2019)



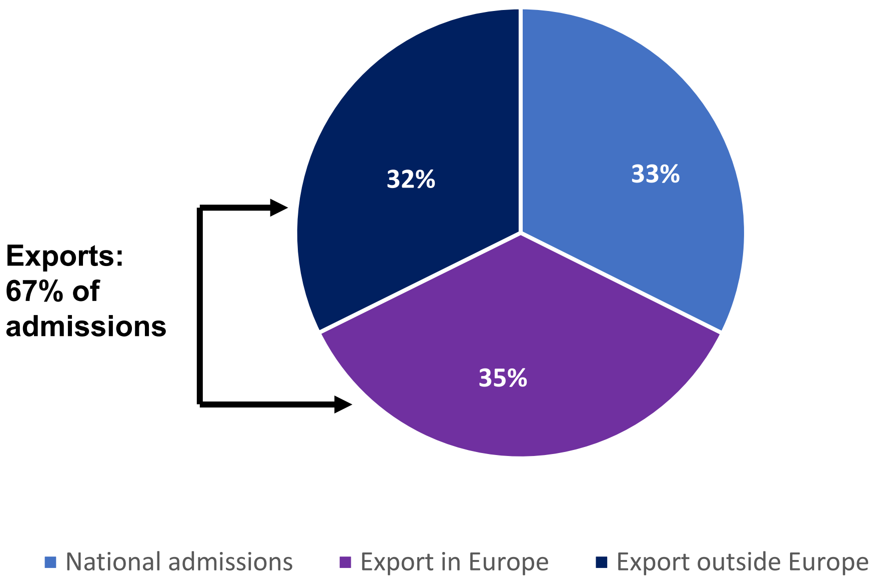
Source: European Audiovisual Observatory

Worldwide admissions to European animation films: the importance of exports

Non-national admissions account for 2/3 of admissions to European animation films, to be compared with 40% for all categories of European films.

Breakdown of worldwide admissions to European animation films (average 2015-2019)

Total: 52 m admissions



Source: European Audiovisual Observatory

Top 10 European animation films by worldwide admissions (2015-2019)

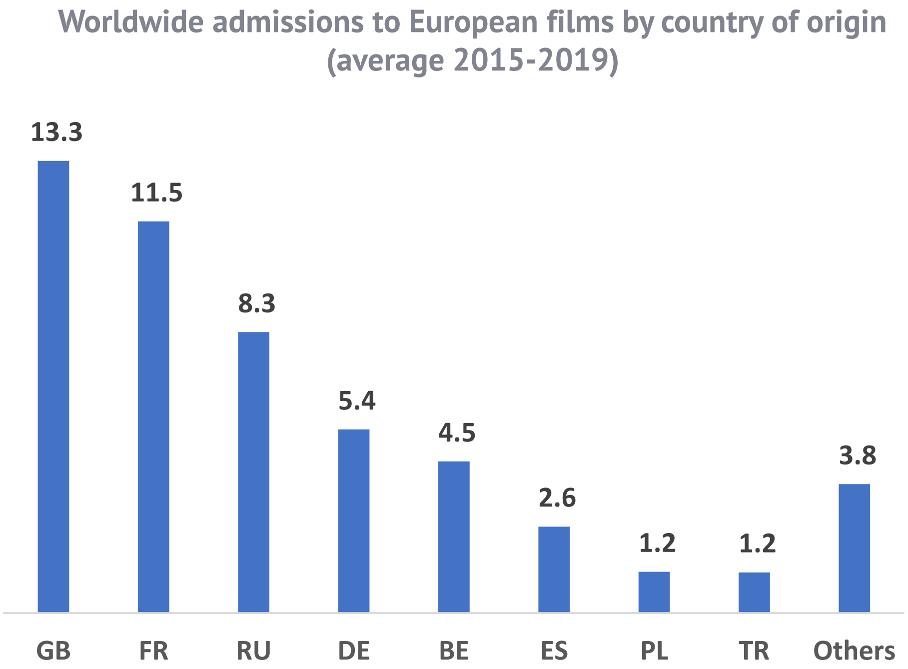
Title	Year of production	Country of origin	Worldwide admissions
Paddington 2	2017	GB / FR	27 726 933
Le Petit Prince	2015	FR / US	17 638 841
Shaun the Sheep Movie	2015	GB	13 332 656
Ballerina	2016	FR / CA	13 303 213
Cats [1]	2019	GB / US	8 134 516
The Son of Bigfoot	2017	BE / FR	7 434 905
Early Man	2018	GB / US	6 757 456
The Queen's Corgi	2019	BE / US	6 704 842
Robinson Crusoe	2016	BE / FR / US	6 656 754
Loving Vincent	2017	PL / GB / CH / NL	5 961 024

(1) Mixed live action and animation

Source: European Audiovisual Observatory

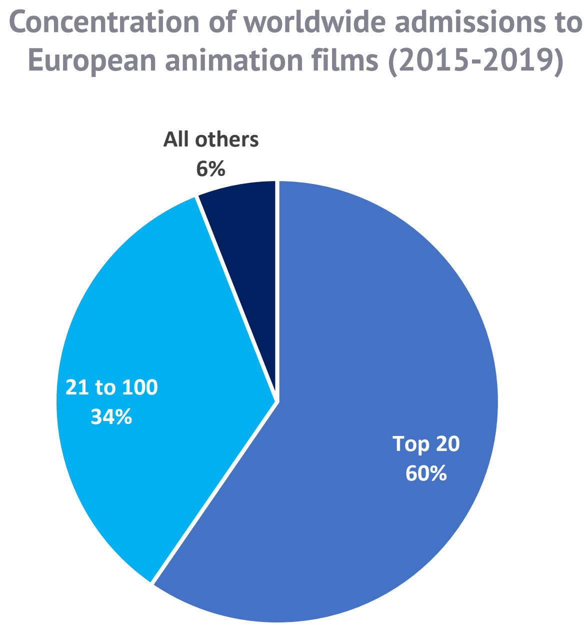
Worldwide admissions to European animation films: the UK leads

- The United Kingdom, France and Russia produce the animation with the highest number of admissions worldwide.
- But the level of admissions to animation films from a given country often depends on the success of a very limited number of films.
- The top 20 European animation films account for 60% of all admissions to European animation films.



Notes: Most admissions to Polish animation films relate to "Loving Vincent" (2017). Most admissions to Turkish animatiion films relate to "Kral Sakir Korsanlar Diyari" (2019) and "Rafadan Tayfa Dehliz Macerasi" (2018).

Source: European Audiovisual Observatory



Source: European Audiovisual Observatory

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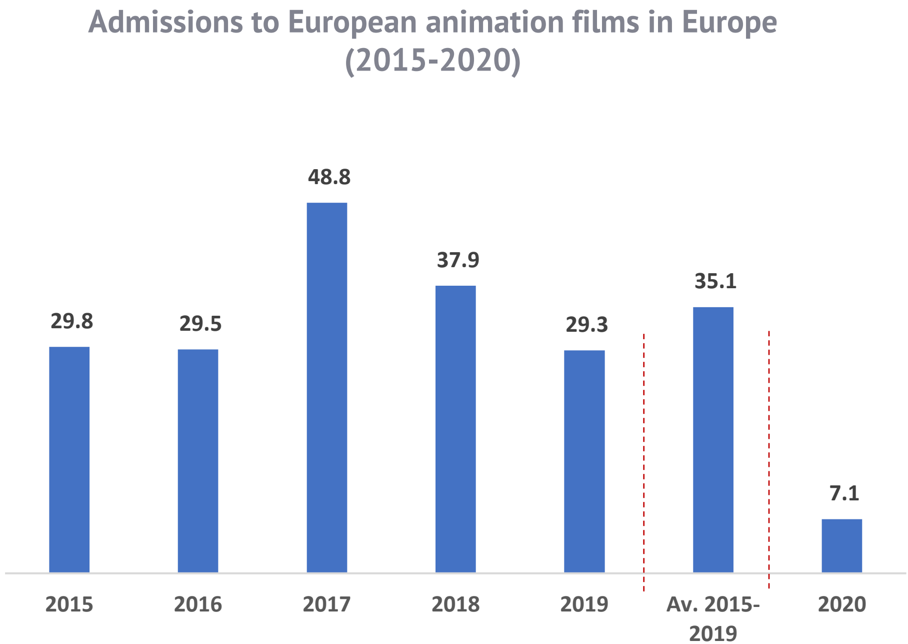
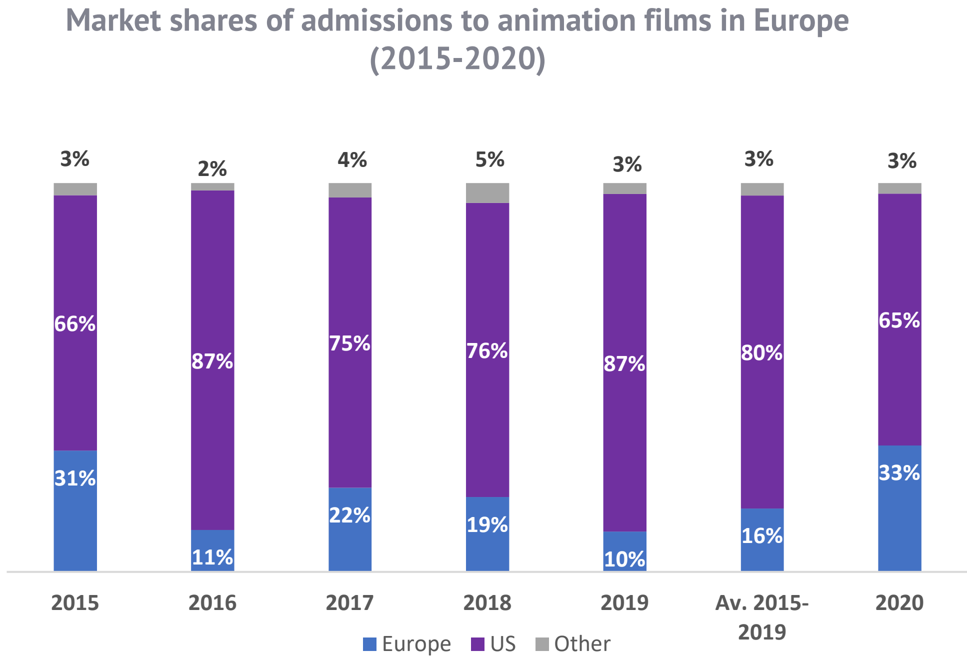
Inside Europe: on average, 35m admissions to European films in Europe

- The level of annual admissions to European animation films is highly variable and depends on the success of few films.
- European animation films get a lower share (16%) of admissions to animation films than films of all categories (29% for EUR 28 in 2019). The animation genre in cinemas is particularly dominated by US films.



Note: the higher level of admissions for 2017 films is due in particular to "Paddington 2".

Source: European Audiovisual Observatory



Note: the higher share of admissions for 2015 European animation films is due in particular to "Le Petit Prince" and "Shaun the Sheep The Movie".

Source: European Audiovisual Observatory

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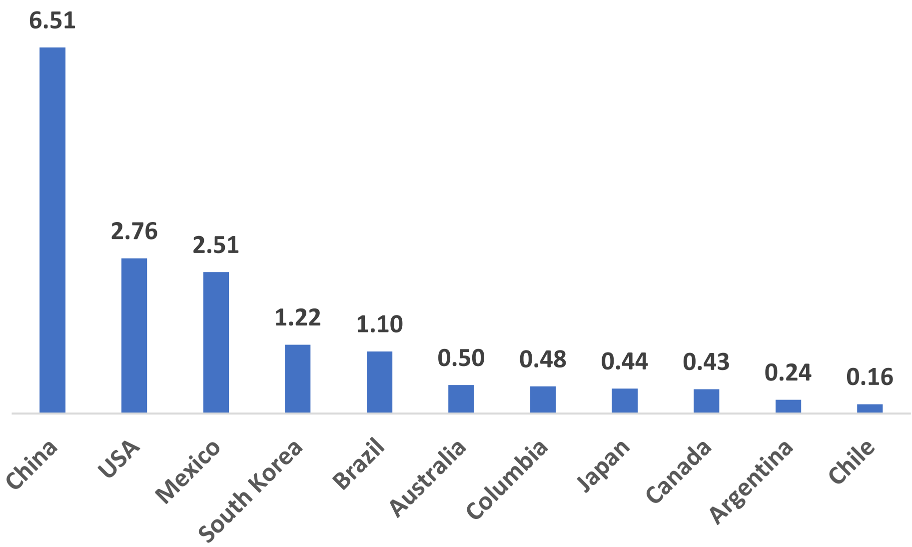
Outside Europe: China, the first non-European market for European animation films

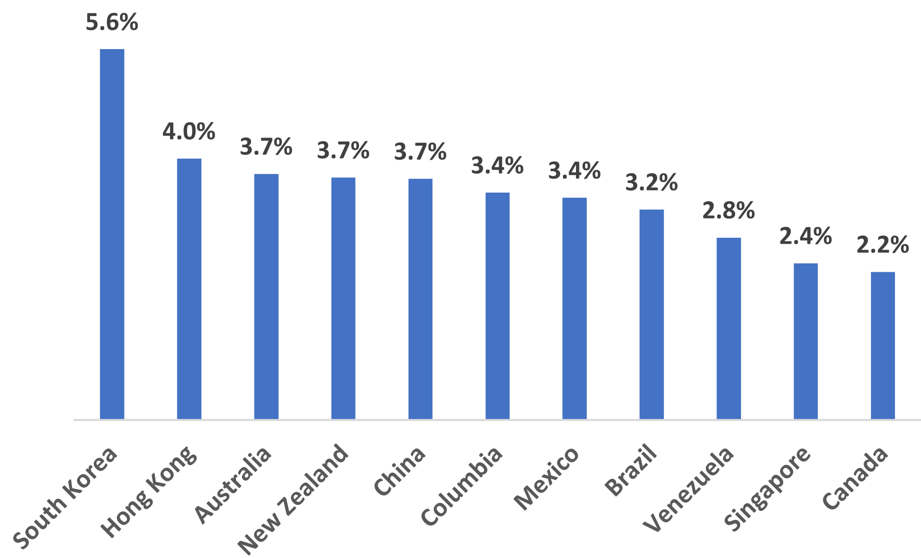
- China alone accounts for close to 40% of admissions to European animation films outside Europe.
- On average, in non-European markets, European animation films account for a 3% share of admissions to animation films, a higher share than for films of all categories.

Top non-European markets by admissions to European animation films (million, average (2015-2019)



Source: European Audiovisual Observatory

Top non-European markets by European films' market share of admissions to animation films (average 2015-2019)



Source: European Audiovisual Observatory

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The production of animation TV content

Disclaimer

- **The identification of animation TV content produced in Europe relied on a variety of sources:**
  - A dataset provided by Plurimedia/The European Metadata Group, based on the analysis of the schedule of a sample of TV channels and SVOD services.
  - An extract of all European animation TV programmes from IMDb public data.
  - A review of the catalogues of large producers and distributors on TV animation.
- Intensive additional desk research was made to check/obtain the number of seasons, the number of episodes and the run time of programmes.
- **There are limits to this methodology:**
  - Some countries are not well represented in the sources we have used.
  - Animation programmes are often packages inside "children programming" blocks, and therefore cannot be identified individually.
  - Programmes made specifically for video sharing platforms such as YouTube are complicated to spot.
  - The methodology combines different approaches to the "year of production", which may have led to double counts.
- **We therefore believe that these figures give a correct order of magnitude of the production of TV animation in Europe but should be taken with care. For the sake of transparency, we provide in a separate annex to this report the full list of animation programmes that we have identified for the 2015-2019 time period. We welcome any feedback on missing programmes.**

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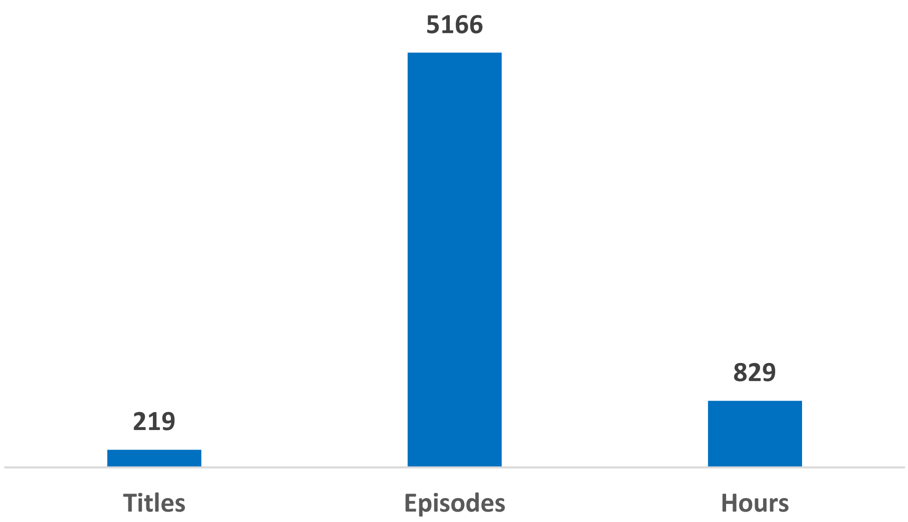
Key findings

- Gathering data on the production of TV animation in Europe faces methodological limits. The figures presented in this section should be considered as order of magnitudes and as a contribution of the European Audiovisual Observatory to a better understanding of the sector.
- The Observatory estimates the annual volume of the production of TV animation in Europe at about 220 titles (TV movie or TV series season), 5200 episodes and 830 hours.
- The sector seems to be experiencing a growth since 2017/2018 as regards the volume of hours commissioned, which translated into an increase of hours broadcast in 2019.
- The sector shows a large variety of formats in terms of number of episodes per season and of duration of episodes.
- France and the United Kingdom are by far the main producers of animation TV content.
- European TV animation coproductions account for 36% of all TV animation hours produced, a much higher share than for live TV fiction.

About 830 hours of European TV animation produced each year

- **Indicators suggest that the production of TV animation in Europe has been increasing.**
  - As the production year in our data often relates to the first broadcast date and taking into consideration the production cycle of long format animation TV series, the increase in production has likely started earlier, in 2017-2018.

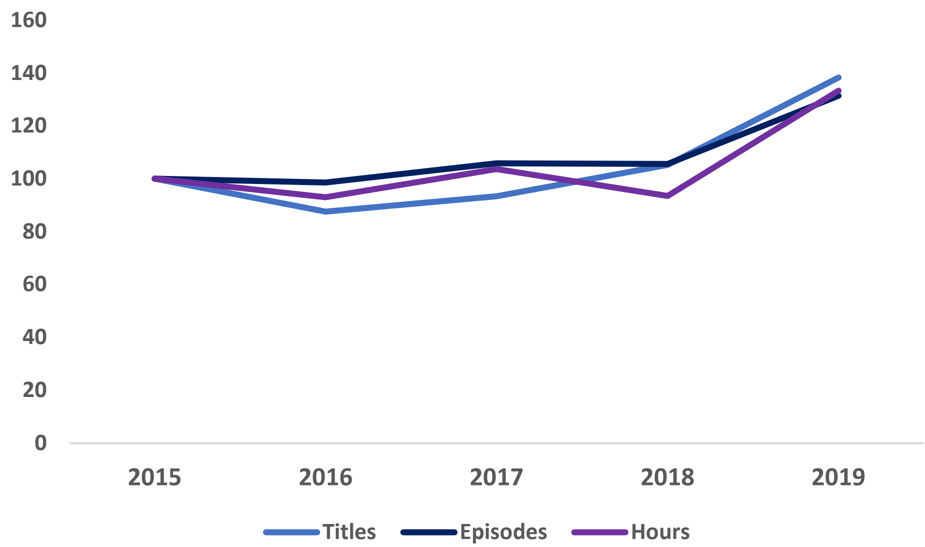
Annual animation TV content production in Europe (average 2015-2019)



Note: 1 title = 1 TV movie or one TV series season

Source: European Audiovisual Observatory

Animation TV content production in Europe (base 100 = 2015)



Note: 1 title = 1 TV movie or one TV series season

Source: European Audiovisual Observatory

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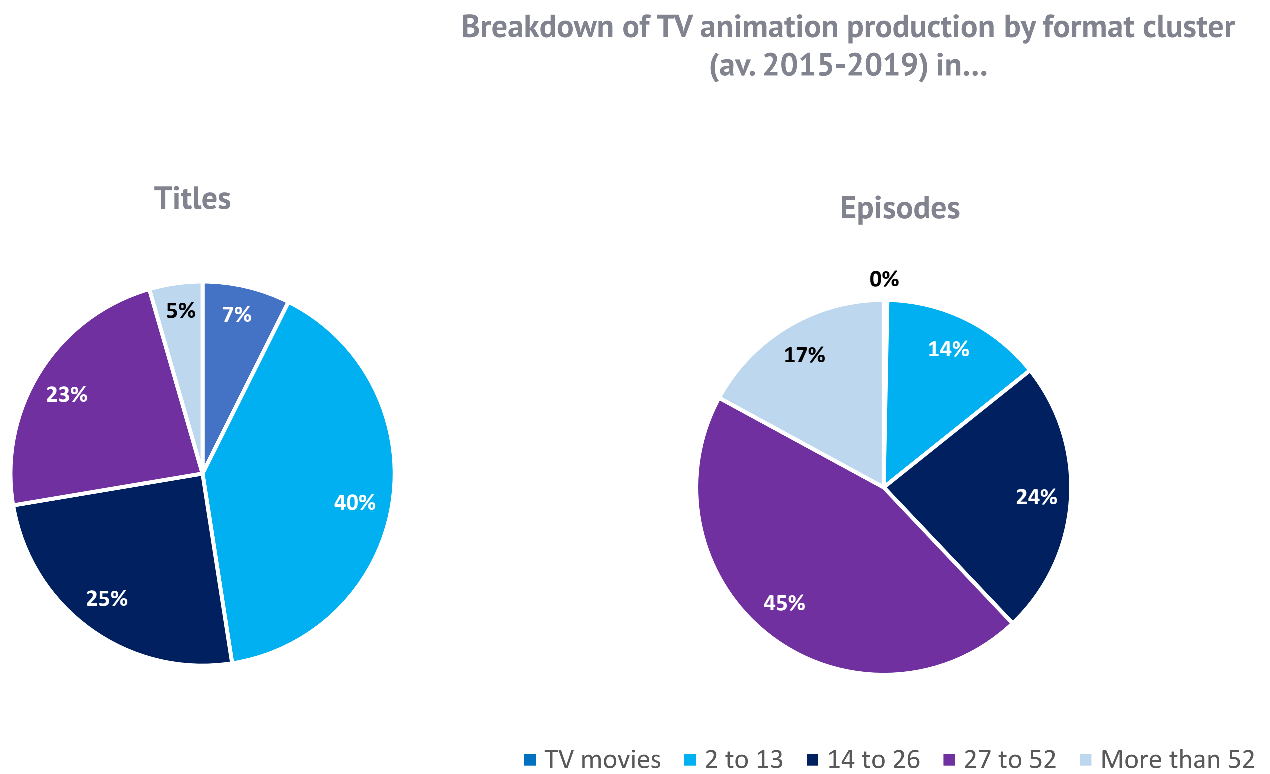
A large diversity in terms of number of episodes per season…

- **The main format of TV animation is series with 2 to 13 episodes.**
  - But TV series with more than 26 episodes per season account for 57% of hours produced.



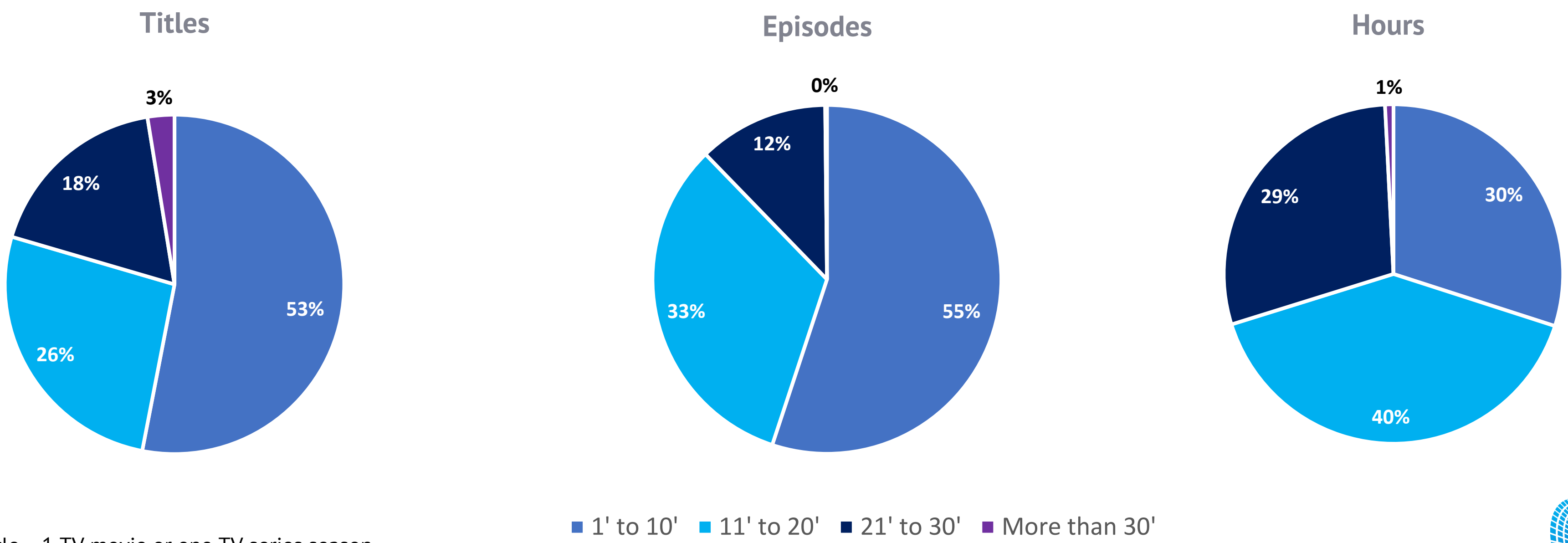
Note: 1 title = 1 TV movie or one TV series season

Source: European Audiovisual Observatory

… and in terms of duration of episodes

- **Short formats (episodes with less than 10 minutes) account for the majority of titles and episodes produced.**
    - But, in terms of hours produced, the production volume is split between 3 main clusters: episodes of less than 10 minutes, episodes from 11' to 20' and episodes of more than 30'.

Breakdown of TV animation production by duration cluster (av. 2015-2019) in…



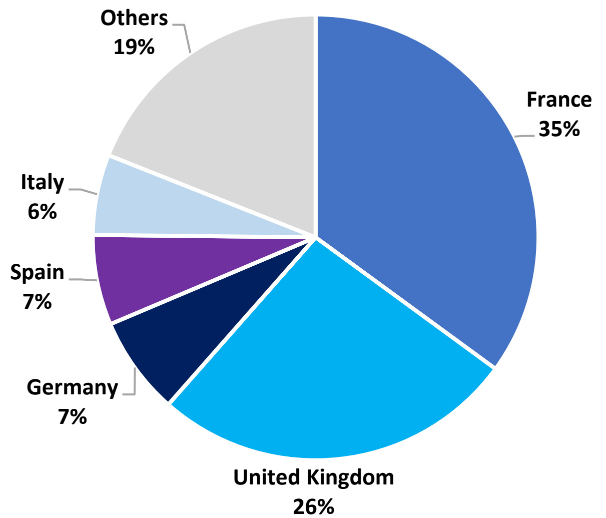
Note: 1 title = 1 TV movie or one TV series season

Source: European Audiovisual Observatory

France and the UK are by far the main European TV animation producing countries

- **Several countries are likely to be underrepresented in the sources used for this report. However, in terms of hours produced, the TV animation production landscape seems to be dominated by France (about 300 hours produced each year) and the United Kingdom (230 hours).**
  - Germany, Spain and Italy come next, with a similar volume of production (about 55 hours each year).
  - Beyond the top 5, Russia (whose production volume is probably underestimated in our data) and Ireland would follow with about 30 hours each year.

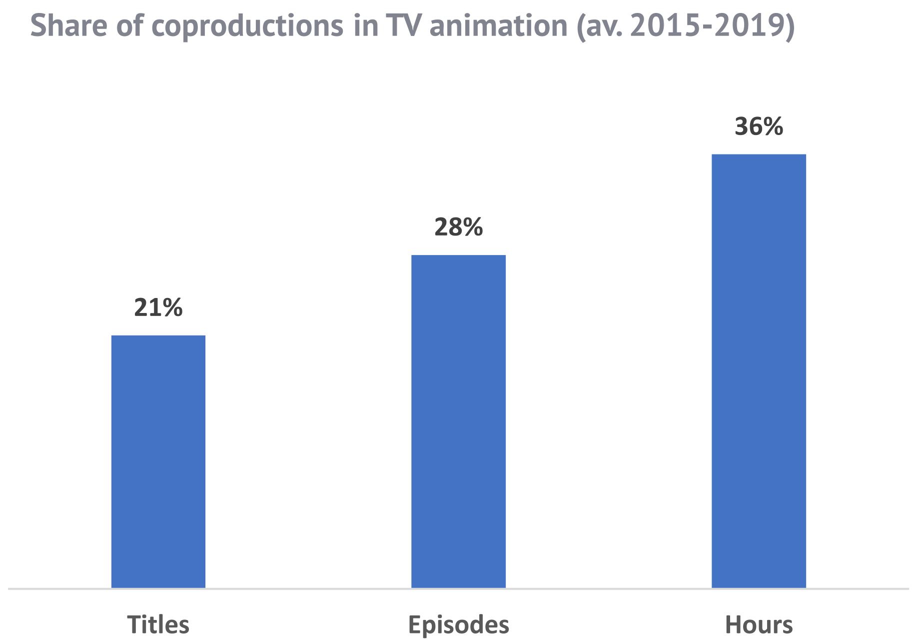
Breakdown of TV animation production by country of origin (hours, av. 2015-2019)



Source: European Audiovisual Observatory

Coproductions much more often present in TV animation than in TV fiction

- **European TV animation coproductions account for 36% of all TV animation hours produced.**
  - The figure compares with a 10% share of coproductions for live TV fiction hours (excluding telenovelas and soaps).
  - Coproductions are much more frequent for animation TV series with larger number of episodes and longer duration of episodes.



Note: 1 title = 1 TV movie or one TV series season

Source: European Audiovisual Observatory

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Animation films and TV content in VOD catalogues

Key findings

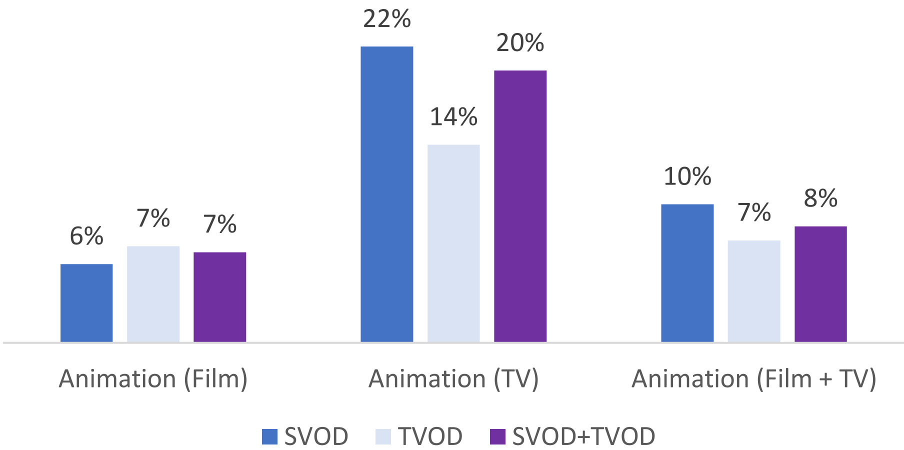
- **Animation films and TV content account for 8% of VOD catalogues titles.**
- **The weight of animation is significantly higher for TV content on SVOD services (22%).**
- **The USA (by far) and Japan are the leading providers of animation films and TV series.**
- **Among European countries, France has a much higher share of animation content catalogues than its share of content of all categories. France is the first provider of animation films and the second provider of animation TV content next to the UK.**
- **The share of European works is significantly lower for animation (21%) than for all categories of works (33%). The gap concerns both SVOD and TVOD and is primarily due to the low share of animation films.**
- **The factors that explain the gap in the European market share for animation works vs. all categories of works differ between films and TV content:**
  - Figures suggest that there is a shortage of European films available for exploitation on VOD. Moreover, when made available on VOD, European animation films circulate better than all categories of European films, but less than animation films from all origin.
  - Figures suggest that there is also a shortage of European TV content available for exploitation on VOD. But the shortage seems higher for recent content than for catalogue works. However, when made available on VOD, European animation TV content not only circulates much more than European TV content of all categories, but also as well as animation content from all origin.

Animation films and TV content account for 8% of VOD catalogues titles

The weight of animation in catalogues is significantly higher for TV content in SVOD (22%)

- The total share of animation content in VOD and SVOD is leveled-out as catalogues include much more films than TV seasons.

Share of animation films and TV content in TVOD, SVOD and all VOD catalogues (June 2021)



How to read this graph: Animation films account for 6% of all films on SVOD, 7% on TVOD, and 7% for SVOD+TVOD
Anime SVOD services excluded. 1 TV season = 1 title.

Source: European Audiovisual Observatory

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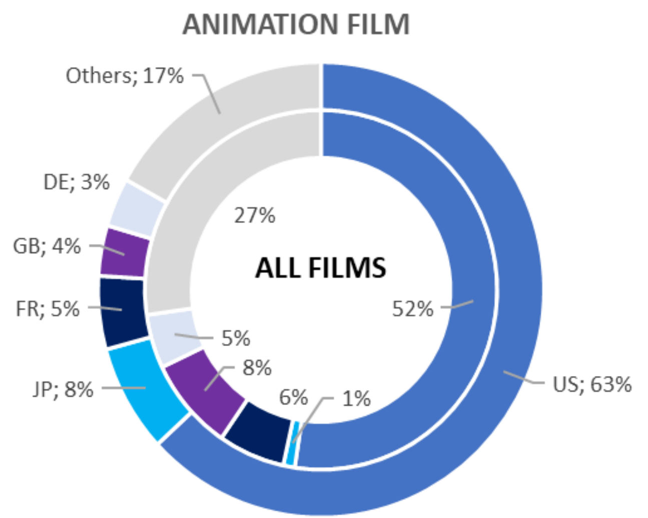
The USA are the main provider of animation films ...

The share of US animation films in VOD catalogues is higher than the share of all US films

- Japan, which accounts for about 1% of all categories of films in VOD catalogues, accounts for about 8% of animation films.
- Within Europe, France has the highest market share for animation films, and a higher market share than for all categories of films. The UK share of animation films is lower than its share of films from all categories.

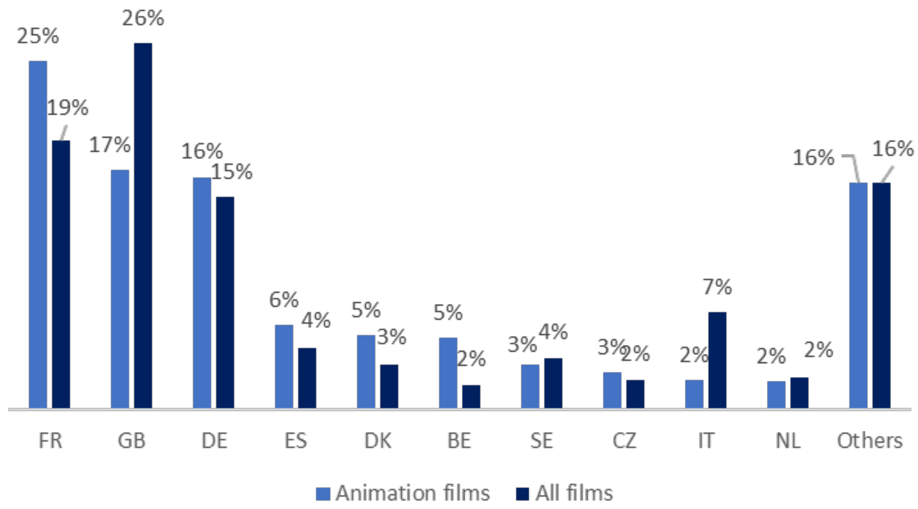
The top 5 providers of animation films in VOD catalogues



How to read this graph: the US account for 52% of all films' presence in VOD catalogue, and for 63% of animation films' presence.

Source: European Audiovisual Observatory

The top 10 providers of European animation films in VOD by share of presence and comparison with share of all films



Source: European Audiovisual Observatory

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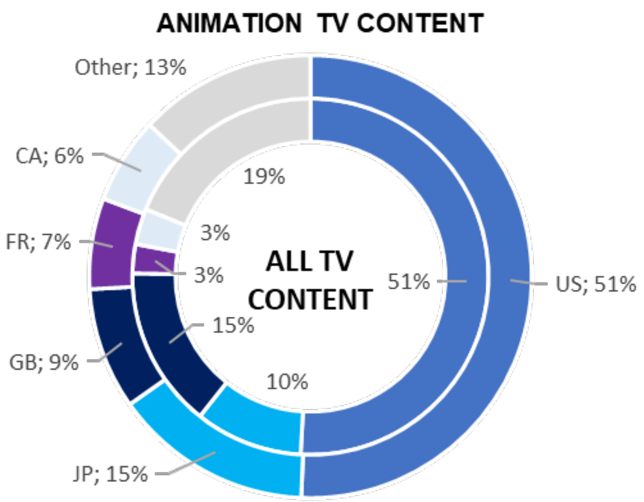
… and animation TV content

The share of US animation TV content in VOD catalogues is similar to their share of all categories of TV content

- Japan provides more animation content than any European country.
- Whereas the UK is the clear leader of the provision of TV content in VOD catalogues, France narrows the gap for animation TV content. Denmark is the 4th provider of animation TV content thanks to the LEGO franchises.

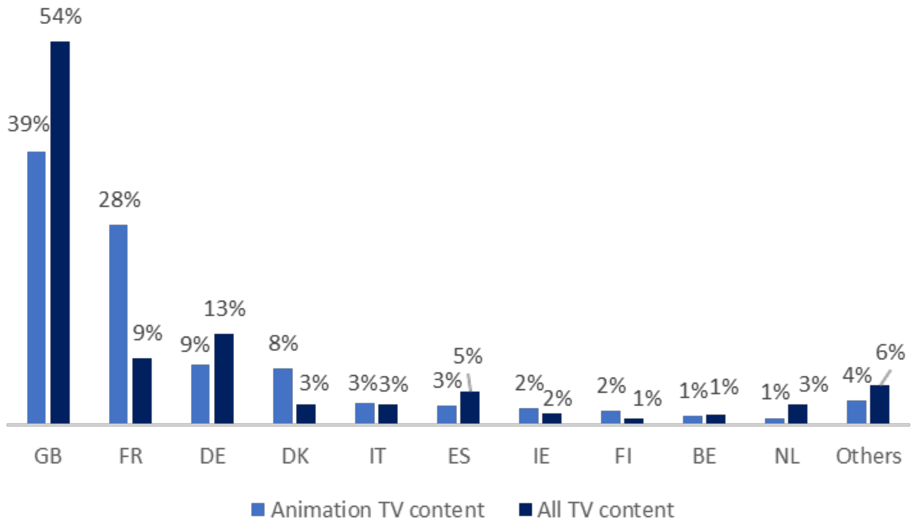
The top 5 providers of animation TV content in VOD catalogues



How to read this graph: the US account for 51% of all TV content presence in VOD catalogue, and for 51% of animation TV content presence.

Source: European Audiovisual Observatory

The top 10 providers of European animation TV content in VOD by share of presence and comparison with share of all TV content



Source: European Audiovisual Observatory

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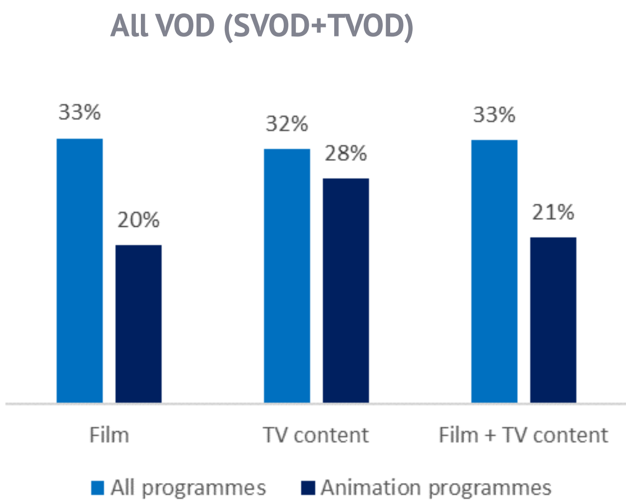
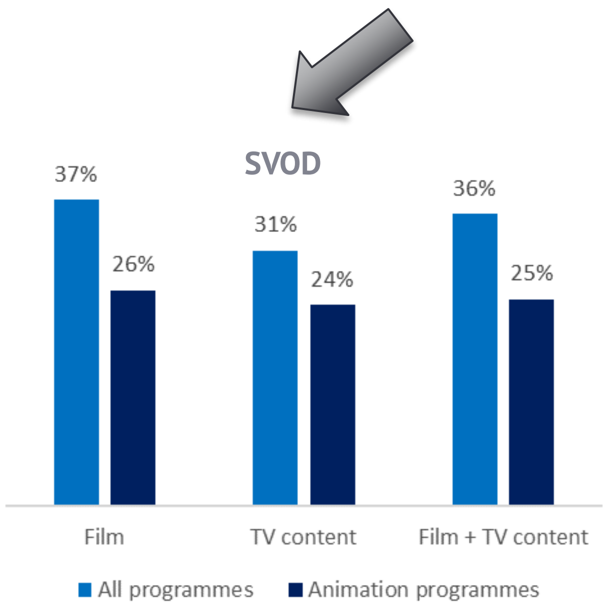
The share of European works is lower for animation than for all works

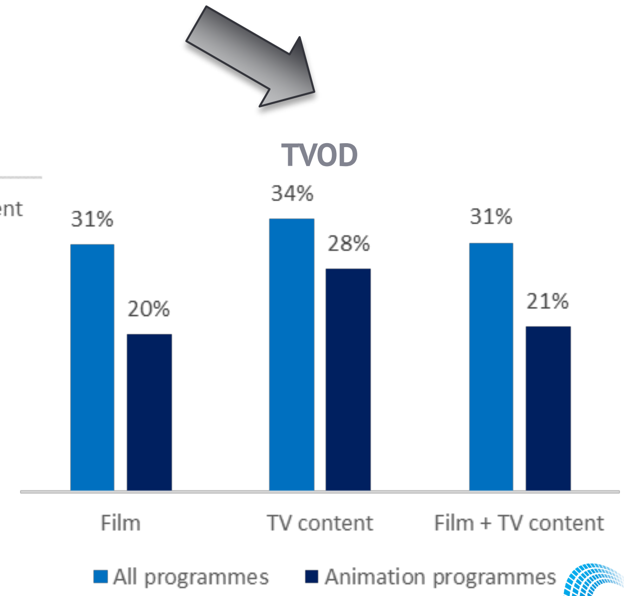
European animation works account for 21% of all animation works vs. a share of 33% for all categories of works

- The European share of animation works is lower both for SVOD and TVOD.
- The gap is primarily due to the low share of European animation films.

Share of European titles among animation titles







European Audiovisual Observatory

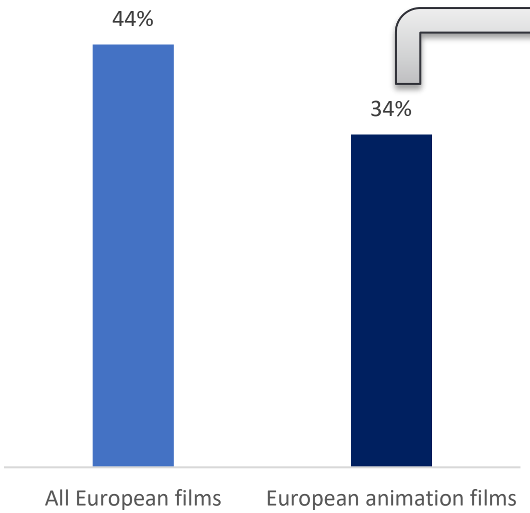
Source: European Audiovisual Observatory

More details on the low share of European animation films (1)

The share of European "unique" animation films is lower than the European share of all categories of films

- This lower share is not due to the lack of catalogue films: the gap remains similar when considering films produced in 2016 or later.
- It is rather due to a lack of European animation films: 94% of all European animation films are already made available on VOD in at least one service.

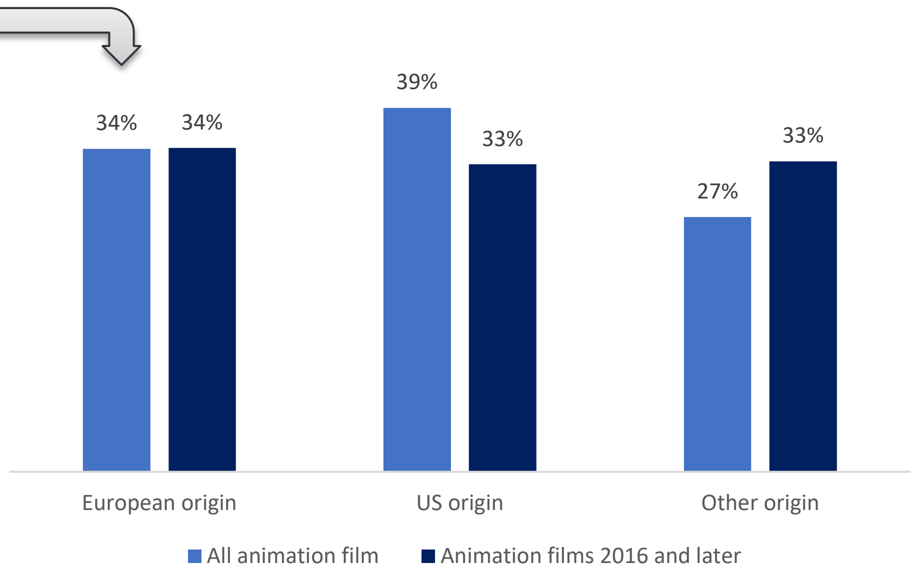
Share of European unique films for animation films and all films



How to read this graph: European films account for 44% of all unique films and European animation films account for 34% of unique animation films.

Source: European Audiovisual Observatory

Share of unique animation films per origin and per year of production



How to read this graph: European animation films account for 34% of all unique animation films and European animation films account for 34% of unique animation films produced in 2016 or after.

Source: European Audiovisual Observatory

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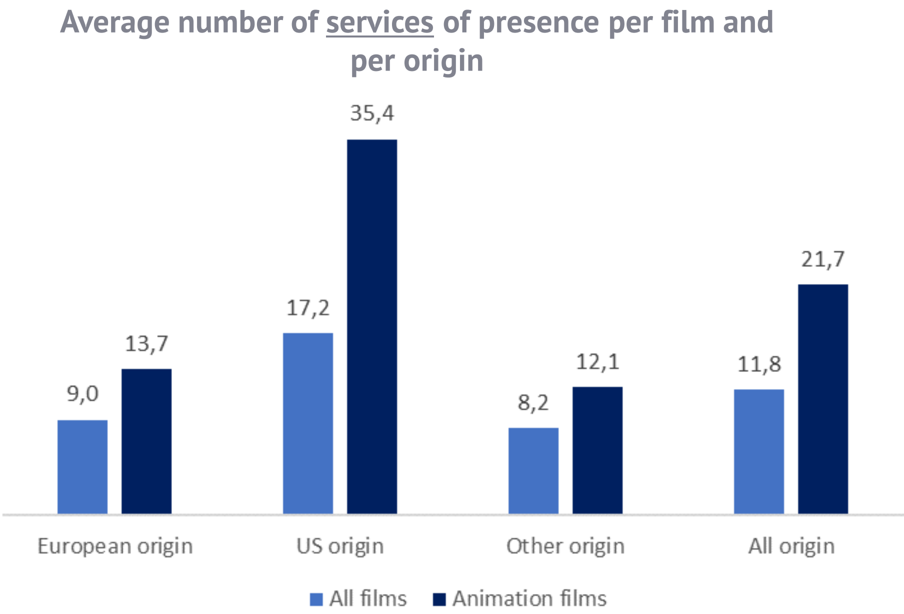
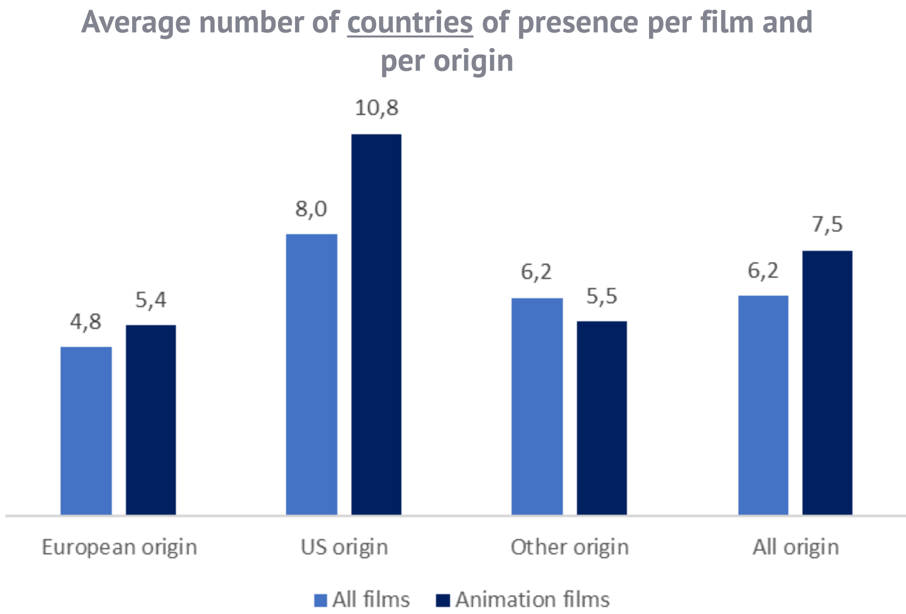
More details on the low share of European animation films (2)

A lower share of unique titles combines with a lower circulation in terms of number of services or countries

- European animation films circulate better than European films of all categories.
- However, this increase in circulation is even higher for animation films from all origin.
- The high ratio between the number of services and number of countries of presence suggest that animation films are made available in a given country on a non-exclusive basis more often than films of all categories.



Source: European Audiovisual Observatory

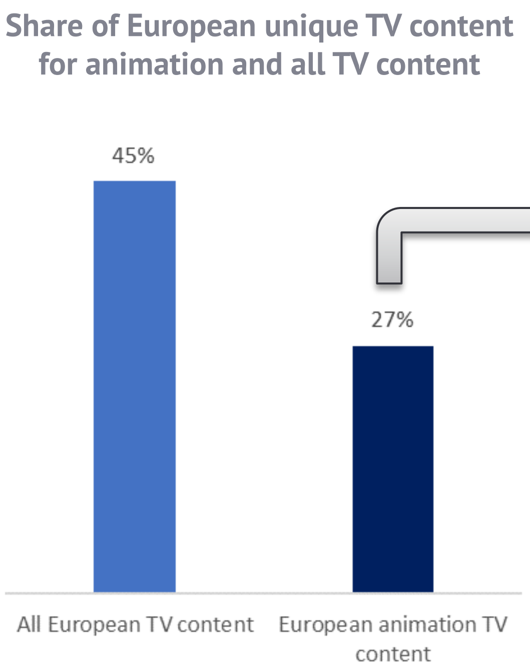


Source: European Audiovisual Observatory

More details on the low share of European animation TV content (1)

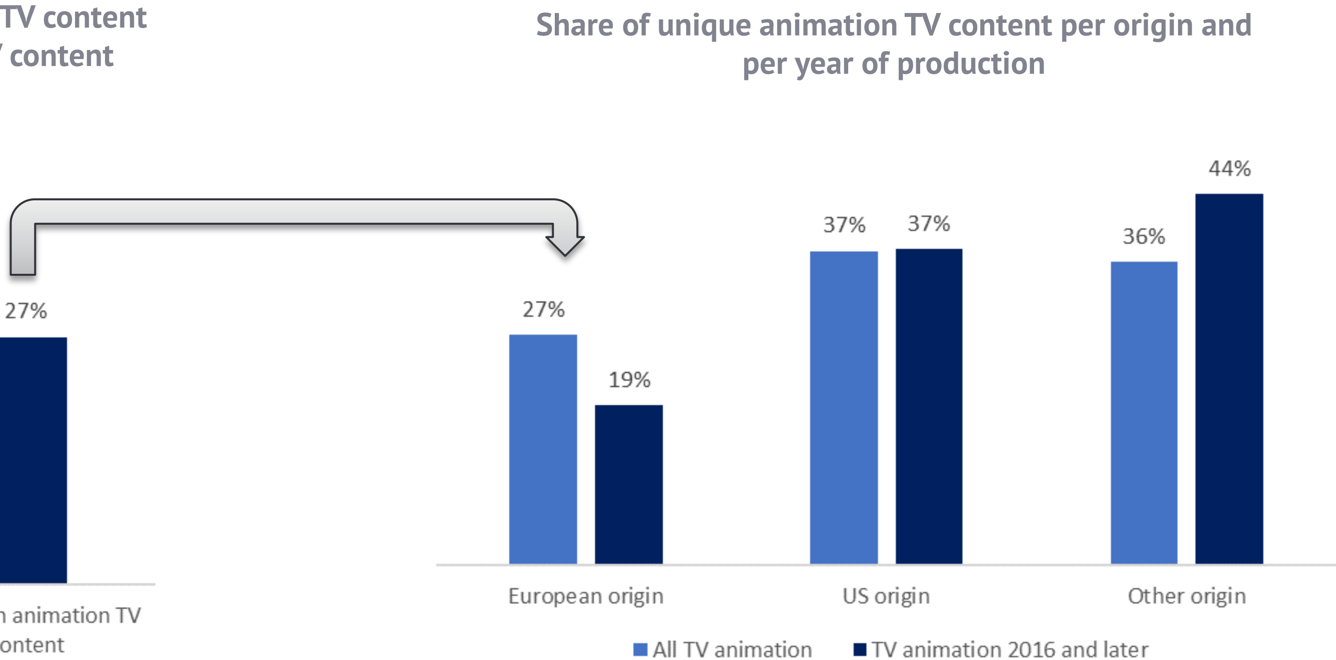
The share of European "unique" animation TV content is lower than the European share of all categories of TV content

- The gap is increasing when considering the most recent TV content (TV series with season 1 produced in 2016 or later.



How to read this graph: European TV content accounts for 45% of all unique TV content and European animation TV content accounts for 27% of unique animation films.

Source: European Audiovisual Observatory



How to read this graph: European animation TV content accounts for 27% of all unique animation TV content and European animation films accounts for 19% of unique animation TV content produced in 2016 or after.

Source: European Audiovisual Observatory

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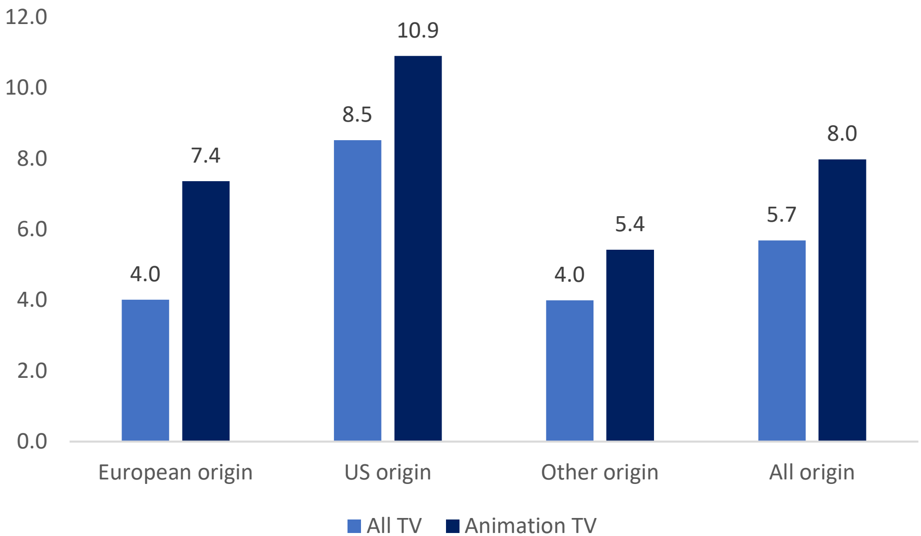
More details on the low share of European animation TV content (2)

Unlike films, European animation TV content circulates as well as animation TV content on average

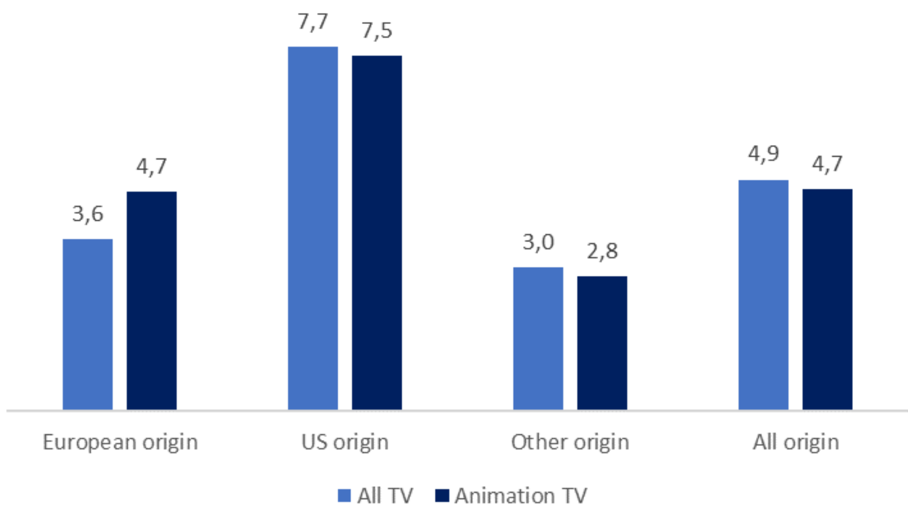
- TV content from all origin circulates less than films, both in terms of services and countries of presence. This applies in particular to animation TV content. Reasons include that many TVOD services do not propose any TV content.
- European animation TV content circulates much better than European TV content of all categories. The increase is driven both by a presence in more countries and the presence in more services in a given country.

Average number of services of presence per TV content and per origin



Source: European Audiovisual Observatory

Average number of countries of presence per TV content and per origin



Source: European Audiovisual Observatory

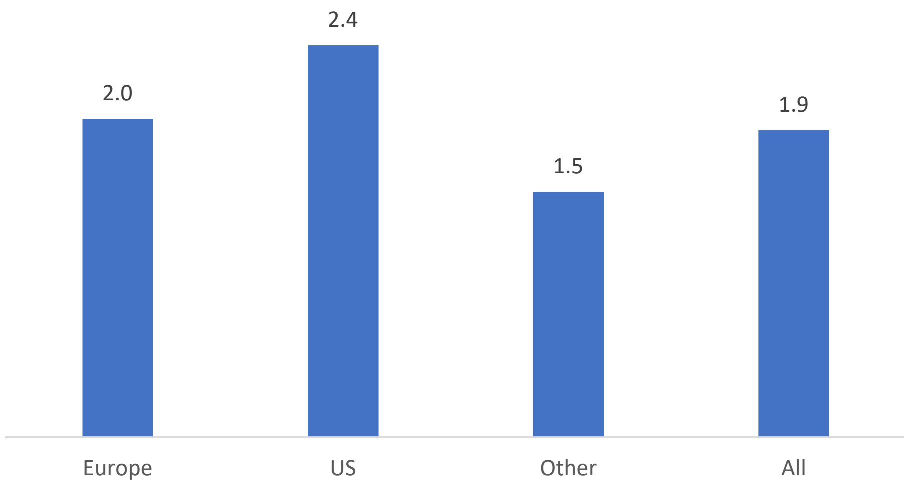
European Audiovisual Observatory

More details on the low share of European animation TV content (3)

On average, European animation series do not have less seasons than animation series from all origin.

- On average, animation series made available on VOD have close to 2 seasons.
- The comparatively low share of European animation TV content cannot therefore be explained by a lower number of seasons per series.

Average number of seasons per animation series and per origin



Source: European Audiovisual Observatory

Annex: list of European TV animation programmes produced between 2015 and 2019

- **The full list of European TV animation programmes produced between 2015 and 2019 can be downloaded here:**

  https://rm.coe.int/eao-european-animation-tv-content-2015-2019/1680a4a67f

European
Audiovisual
Observatory

More information:

www.obs.coe.int

Gilles.Fontaine@coe.int