

# FOCUS ON ANIMATION

Produced by the  
European Audiovisual Observatory  
on behalf of the  
European Commission





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EUROPEAN AUDIOVISUAL OBSERVATORY  
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Yearbook 2013  
Volume 1



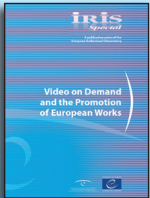
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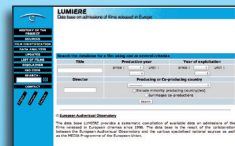
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2015

## The images used on the cover of this publication are from the following animation works:

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Les triplettes de Belleville  
Minuscule  
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Peppa Pig  
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Song of the Sea  
Albert  
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Hocus Pocus Alfie Atkins  
Identikat - Mirò the Cat  
Maya the Bee  
Moomins on the Riviera  
Mortadelo y Filemón contra Jimmy el Cachondo  
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Pointillés



The animation industry has become a vital part of the European audiovisual sector both in cultural and economic terms where technology, creativity and business intertwine with each other.

The recent success stories in the animation industry are concrete proof of the capacity of creative industries to contribute to cultural diversity and boost jobs and growth whilst harnessing the full potential of digital technologies. The European Commission promotes the economic performance of the creative and cultural sectors and their potential to act as a catalyst for creativity, innovation and cross-pollination between sectors. At this time animation has a key role to play in making this the case.

Animation is also the branch of the audiovisual sector with the greatest potential in terms of audience and largely contributes to cultural diversity in Europe and to the circulation and promotion of European culture worldwide.

In this context it is a great pleasure for me to introduce the *Focus on Animation 2015* in cooperation with the European Audiovisual Observatory. The collection of sufficient in-depth intelligence on this industry is a key milestone in the definition of efficient policy to support the full potential of animation at a European level.

Indeed, we cannot ignore the fact that the European animation industry faces challenges, not least the drain of creative talent to US or Asian based competitors. While national and regional policy makers in Europe are supporting the animation industry, it may be time now to consider the potential of the industry from a broader European Union perspective.

**Lucia Recalde Langanica**

Head of MEDIA sub-programme of Creative Europe, European Commission

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On the occasion of Annecy's MIFA 2015, the European Audiovisual Observatory is pleased to present the *Focus on Animation*, which outlines the first results of a larger project to map the animation industry in Europe.

The Creative Europe MEDIA sub-programme of the European Commission entrusted the Observatory with the challenge of describing the current European animation environment. It is no coincidence that this project has been launched, for the first time ever, at this moment when the industry is gaining momentum; not only is European animation increasing its share of the pie both at home and abroad, but there is a general consensus that the industry has plenty of scope for future growth. The European institutions are well aware of this potential.

The purpose of this booklet and the final report that will follow by the end of the year is to quantify the importance of animation within the overall European audiovisual industry. On the one hand, we are tracking production, distribution and circulation of European films and TV works; on the other, we are gathering structural data on this sector of the industry (employment, income, number of companies, et cetera). An important aspect of the second phase of this mapping will require the co-operation and support of the industry stakeholders and associations regarding provision of data and feedback. We are grateful for the help already received, in particular from Cartoon and CITIA.

We are confident that a clear picture of the current situation will contribute to paving the way ahead and helping the development of a more robust animation industry.

**Susanne Nikoltchev**

Executive Director, European Audiovisual Observatory

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The European Audiovisual Observatory, set up in 1992, is a public-service body whose mission is to supply information services (concerning film, television, home video, on demand audiovisual services as well as related public policies) to the audiovisual industry in Europe. The Observatory has 40 member countries, along with the European Union represented by the European Commission. The Observatory is part of the Council of Europe and located in Strasbourg, France. It carries out its mission with the help of a network of partners, correspondents and professional organisations.

The Observatory provides information on markets, financing and legal aspects of the audiovisual sector.

Source: <http://www.obs.coe.int>





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## Charting unknown waters

This booklet is part of a major research project entitled “Mapping the Animation Industry in Europe” commissioned to the European Audiovisual Observatory by the Creative Europe MEDIA sub-programme of the European Commission. The project aims to track the production volume, distribution and circulation of European animation films and TV works, and also to provide a general overview of the structure of the animation industry country by country and in Europe as a whole.

A second publication is foreseen for the end of 2015. Building upon the figures presented here, the final report will offer an in-depth analysis of the many elements and perspectives which, either due to lack of space or availability of the figures at the time of the publication, could not be included in this booklet.

## Theatrical animation

### No piece of cake

The animation industry, as old as film itself, keeps fighting the misconceptions about it among the general public. Animation is an artistic tool for telling a story, whether a comedy, drama or documentary. Animation implies above average production periods and above average investment. To begin with, it is not unusual to spend more than three years in the development stage. In addition, crews are larger and the actual production takes much longer than that of non-animated films. Therefore, it is not surprising that it often takes more than a decade to see the first recoupments.

Despite the enormous differences from country to country, it can be said, in general rule that the decrease of investment in animation by European broadcasters has forced producers to explore new sources of financing. Licensing and internet services have become more and more fundamental for the industry. Producers, broadcasters and distributors are now partners in the business of IPs and Brands rather than handling single titles. Successful programmes are expanded to become sagas, and the subsequent sequels add market value to the properties. The multiplier effect of online services is necessary to develop the brand’s digital presence, thus to enlarge its commercial value.

### 14.7% of European admissions go to animation films

Animation films achieved an average of 179.8 million admissions in Europe over the period 2010-2014, representing 14.7% of the market. UK & Ireland was the largest market for animation in the EU with an average 30.5 million admissions over that period;

along with Russia and France, the three account for more than half of the yearly average admissions to animation in Europe (179.8 million). However, when it comes to the share of animation in each country, smaller territories such as the three Baltic states and Slovakia and Slovenia stand out with high levels of admissions.

### European animation only gets 20% of the animation market in Europe

188 new animations were on release in the European Union in 2014, 107 of which produced in the EU. Compared to the average 33.3% market share for European films in Europe, European animation got a thinner slice of the pie in proportion, with only 20% of the market share for animation in 2014. In turn, the 44 American films on release accounted for most of the box office to animation that year (71.6% of the admissions). Furthermore, the top 20 European animation films between 2010 and 2014 had 84% of the admissions to animation in Europe, with three UK inward investment productions accounting for more than a third of them.

### A yearly average of 50 animation films produced in Europe

250 European feature animation films were produced (and released) between 2010 and 2014, representing just 3% of the production volume and 2.94% of the total European admissions. France, Spain and the UK were the main producers of animation, accounting for 40% of the overall production of animation in Europe. In turn, medium and low volume production countries like Belgium, Luxembourg or Ireland stand out as minority partners in animation films, not only in Europe but worldwide.

### Animation, the best way to travel

The analysis of the average number of territories of distribution of the animation films produced in a country shows that Belgian animation travels as no other, with an average of 20,4 distribution territories per film. However, it is UK animation – with 53.5 million admissions abroad, which tops the list when it comes to admissions abroad despite having an average export rate of 4.5 territories of release per film (the lowest of the big 5). It is also worth noting that films from big production countries such as France or Spain have a relatively low performance abroad compared to their remarkable export ratios (see page 17).

### It's a hard world

The US is, by far, the largest market for animation in the world. Between 2010 and 2014, feature animations did a yearly average of 173.9 million tickets,

accounting for 14.2% of the total admissions in the country. Despite only accounting for 2.8% of the production volume of the country, domestic feature animation films represented 12% of the total domestic admissions in 2014.

The yearly average market share for European films in North America between 2010 and 2014 was 2.96%. However, this was mostly due to the high performance of three films (*Gnomeo and Juliet*, *Arthur Christmas* and *The Pirates! Band of Misfits*), representing 75% of the admissions to European animation in the country.

The analysis of world markets other than the US & Canada, could not be conducted in a comprehensive way. On the one hand, the limited information available on China (only 2014 admission could be taken into account in this report) does not allow for an analysis of the evolution in the country; on the other, the Indian and Japanese market could not be analysed at all due to a lack of data. However, just from the production volume calculated from the number of animation films released in the countries tracked, it becomes evident that Japan is one of the main producers of animation in the world. Equally, China was the second largest market for animation in the world in 2014; a country where European animation has still a very marginal penetration (only 5 European animation films made it into the Chinese market, reaching a meagre 0.19% of the admissions to animation). However, China has the potential to increase dramatically the performance of a film –that was the case of *Minuscule - La vallée des fourmis perdues* and *Niko 2: Lentäjävөлjekset*, where China represented 37.7% and 21.3% of their non-national admissions respectively.

## European linear (television) and non-linear (on-demand) audiovisual services

This first attempt at mapping the animation industry with regard to television (and on-demand services) has proved to be a challenge. It is difficult to establish a reliable picture of production volume for television without the availability of a comprehensive European database of TV animation. Some very useful sources of data include: the MAVISE database of the European Audiovisual Observatory in terms of services available; certain national institutions who gather extensive data on audiovisual markets and audiovisual productions such as the CNC in France; and data from various commercial providers which may help to develop a European overview of TV animation products. In addition, the project in the future will hopefully benefit from the feedback of national associations of animation producers, and national broadcasters to enhance the data on TV animation.

## Children's channels – an explosion of niche services

In Europe, one of the earliest examples of a children's TV channel is Canal J, launched in 1985 in France. Of the US affiliates, the first launches in Europe were the Disney Channel (1995), Cartoon Network (1993) and Nickelodeon (1995). Further launches in the 1990s included the French channels Mangas and Télétoon+, and the German channels Super RTL and Junior.

The data outlined on P57 shows the current snapshot of children's channels established in the European Union. From a total of 301 (plus an additional 40 HD simulcasts), 217 channels are established in the European Union by US affiliates. The UK, the Czech Republic and the Netherlands emerge as European homes of major US brands (Disney, Boomerang, Cartoon Network Nickelodeon). Walt Disney Inc, Viacom Inc, Turner Inc and AMC Networks Inc are the major players in children's television in Europe. A further 80 private children's TV channels are established in the EU including those of some of the major EU groups (Lagardère, RTL and Bonnier). Eighteen public service children's channels have been established in 11 EU countries: Belgium, Czech Republic, Denmark, Germany, Ireland, Italy, the Netherlands, Poland, Spain, Sweden and the United Kingdom.

## On demand services: a new platform for distribution and pre-financing?

The MAVISE database also compiles information on on-demand services (including catch-up and various types of VOD), including those that target children. Two major obstacles exist with regard to mapping the animation industry in the on-demand environment. Firstly, data on viewing and consumption of on-demand services is very difficult to access and the major players do not tend to share this information.

A second challenge is providing an overview of the types of content available on catalogues due to the vast numbers of titles on the catalogues and the territorial distinctions in content for the same services. Only expensive customised research aids in accessing this data, and this report provides a small sample of what such an analysis could look like.

This focus briefly introduces the main developments regarding children's and animation content in the on-demand world which is becoming the next battle ground of the major VOD players. Exclusive agreements with production houses, content acquisition and the launching of dedicated services for children are being announced daily in the press: Amazon with Viacom for exclusivity on Nickelodeon shows; Netflix with Disney, Dreamworks, Cartoon Network and Mattel. Specific child oriented services have been launched such as the Netflix "For Kids" section, the Youtube kids app, and as announced in June 2015, Amazon's

Free for Kids Unlimited - to include videos, e-books educational applications and games with potential content would include children's titles from Disney, Mattel, Nickelodeon and Aardman Studios. The challenges and opportunities for European animation presented by these developments will be furthered examined in the broader mapping animation project.

## European content on TV – main trends

Focus on Animation provides overviews of the five main EU markets. Regarding the production of TV animation these are very different markets. The French market is strong in the production of TV animation. According to the CNC (Centre national du cinéma et de l'image animée), the production volume of TV series in France increased in 2012 by 63% compared to the previous year.

For the broadcasting of TV animation on the main generalist channels, two different sources were used. The French CNC publication *Marché de l'animation en 2013* shows a stability of broadcast volume over time (2009-2013) on TF1, France 2, France 3, Canal+, France 5, M6, and also illustrates that TF1, France 3 and France 5 are the major broadcasters of animation among the generalist channels. Further data shows an equivalent consistency regarding origin of programming with French programming representing an average of 42,4% of the animation broadcast on these channels over the time period.

Data from ROVI International Solutions shows that regarding French children's channels the highest proportion of French animation appears on Canal J, Gulli, Mangas and Teletoon+.

For the other countries, just data from ROVI International Solutions was used. The UK is also an important market in the production of TV animation series. It is also a major home of children's channels that are broadcast throughout Europe. For the main generalist and entertainment channels, the level of non-European animation (up to 60% in 2013) is much higher than on children's channels. Two channels with a significant level of US animation are Comedy Central and Sky 1. For the UK children's channels (CBBC, CITV and Cbeebies) the proportion of national animation is over 83% of the total.

In Spain, the data revealed a major reduction on the amount of animation broadcast on all the main channels between 2009 and 2011. This could be a consequence of the financial crisis in Spain, or could also be due to the migration of programming to children's channels. On the children's channels the proportion of non-European content exceeds 60%. Content from other European countries such as the UK, France and Italy make up a considerable part of the European animation on Spanish TV.

German main generalist channels also show a major reduction on the amount of animation broadcast between 2009 and 2011. The proportion of German animation on German TV is very low overall with the highest proportion of almost 15% on the national channels KIKA, Super RTL, RIC TV, Fix&Foxi and Junior. Almost 80% of content on KIKA is European, including German, French, British and co-productions.

Italy also follows the trend of reduction in animation over time on the main generalist channels, but children's channels from Rai, in particular RAI Gulp contain an impressive level of European content including British, French and Italian.

Some further analysis is carried out for channels in a range of smaller countries such as Belgium, Ireland, the Netherlands, Sweden and Finland showing the proportions of European and non-European animation and also the extent to which European TV animation travels around the broadcasters in Europe. An overview of the US channel brands provides some interesting insights into the programming of different country versions. In particular the levels of European versus US programming often varies on the same brand in different countries.

## Show me the figures

The lack of information for some indicators, along with the methodological diversity of the various sources in the countries covered in this *Focus on Animation*, represented the main obstacles to a more comprehensive analysis; this being especially true when it comes to structural figures. The European Audiovisual Observatory has conducted a survey on the structure and the production volume of European animation companies contacting 8 500 professionals in 34 European countries. So far only 900 answers have been received. In the second part of the project, leading to a final report, the European Audiovisual Observatory will try to obtain more data by interviewing key players from the industry and trying to reach more companies through our ongoing online survey. It is on this particular point, more than any other, that the commitment of the industry is needed. In the meantime, we hope that you enjoy reading this first Focus on Animation.

## That's all Folks!

# Cartoon Forum

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Admissions 2014 all films	3 264.0 million
Admissions 2014 animation	467.9 million

① This section includes the group of countries for which figures were available. Please refer to the methodology at the end of the report to have a comprehensive list of the countries covered.

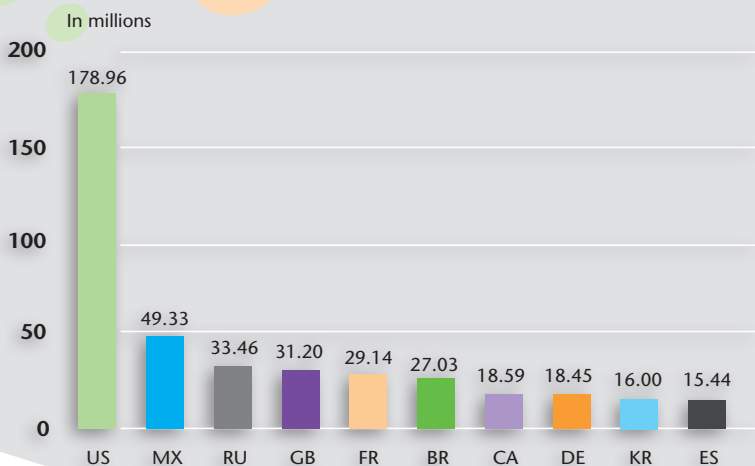
Animation market share 2014

Animation films  
14.34%

Others  
85.66%

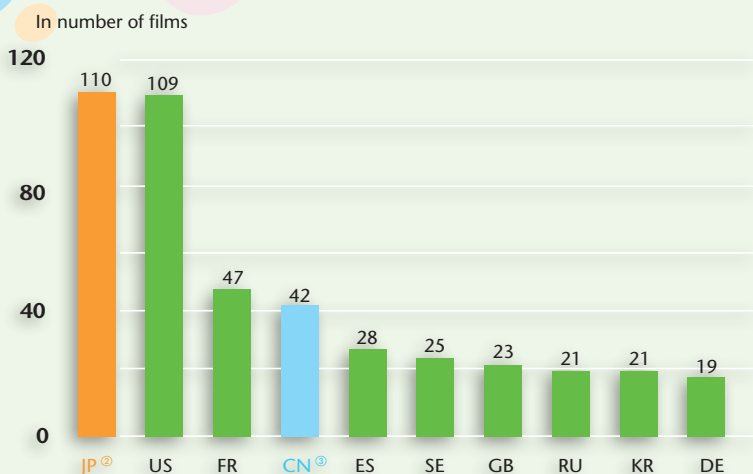
OBS LUMIERE/RENTRAK

### Top 10 markets by admissions to animation Films • 2010-2014 average



OBS LUMIERE/RENTRAK

### Top 10 production countries by volume of animation films <sup>①</sup> • 2010-2014



OBS LUMIERE/RENTRAK

① Includes films produced and released in the period 2010-2014. Films produced in 2014 or before but not released before 2015 could not be included.

② Data on the Japanese market were not available. Therefore Japanese animation films released only in Japan could not be taken into account. Hence, the actual volume of production of animation in the country is likely to be higher than the one presented here.

③ Data on the Chinese market was only available for 2014. Therefore Chinese animation films only released in China could only be taken into account if they were on release in 2014. Hence, the actual volume of production of animation in the country is likely to be significantly higher than the one presented here.



## Top 20 animation films by admissions worldwide • 2010-2014

Rank	Title	Country of origin	Director	Admissions	Year of production
1	<b>Toy Story 3</b>	US	Lee Unkrich	<b>115 178 819</b>	2010
2	<b>Frozen</b>	US	Chris Buck, Jennifer Lee	<b>113 208 834</b>	2013
3	<b>Despicable Me 2</b>	US	Pierre Coffin, Chris Renaud	<b>107 669 272</b>	2013
4	<b>Ice Age: Continental Drift</b>	US	Steve Martino, Mike Thurmeier	<b>99 701 226</b>	2012
5	<b>Shrek Forever After</b>	US	Mike Mitchell	<b>90 381 490</b>	2010
6	Madagascar 3: Europe's Most Wanted	US	Conrad Vernon, Tom McGrath, Eric Darnell	<b>81 190 497</b>	2012
7	Monsters University	US	Dan Scanlon	<b>76 025 021</b>	2013
8	Brave	US	Steve Purcell, Mark Andrew, Brenda Chapman	<b>64 903 885</b>	2012
9	How to Train Your Dragon 2	US	Dean DeBlois	<b>64 033 657</b>	2014
10	Tangled	US	Nathan Greno, Byron Howard	<b>63 862 564</b>	2010
11	Despicable Me	US	Pierre Coffin, Chris Renaud	<b>62 306 657</b>	2010
12	The Croods	US	Chris Sanders, Kirk De Micco	<b>61 571 950</b>	2013
13	Puss in Boots	US	Chris Miller	<b>60 744 472</b>	2011
14	Kung Fu Panda 2	US	Jennifer Yuh	<b>60 573 616</b>	2011
15	Cars 2	US	John Lasseter, Brad Lewis	<b>59 860 402</b>	2011
16	Rio 2	US	Carlos Saldanha	<b>57 648 950</b>	2014
17	The Smurfs	US	Raja Gosnell	<b>57 364 944</b>	2011
18	How to Train Your Dragon	US	Dean DeBlois, Chris Sanders	<b>55 699 442</b>	2010
19	Rio	US	Carlos Saldanha	<b>53 787 126</b>	2011
20	The Lego Movie	US/AU/DK	Phil Lord, Christopher Miller	<b>53 105 916</b>	2014

Note: Films in bold are ranking among the top 20 of all film genres by admissions worldwide.

OBS LUMIERE/RENTRAK

## Top 20 animation films by admissions worldwide excluding US productions • 2010-2014

Rank	Title	Country of origin	Director	Admissions	Year of production
1	<b>Gnomeo and Juliet</b>	GB inc/US	Kelly Asbury	<b>22 534 924</b>	2011
2	<b>Happy Feet Two</b>	AU	George Miller	<b>16 970 992</b>	2011
3	<b>Arthur Christmas</b>	GB inc/US	Sarah Smith, Barry Cook	<b>16 924 523</b>	2011
4	The Nut Job	CA/KR/US	Peter Lepeniotis	<b>14 743 528</b>	2014
5	The Pirates! Band of Misfits	GB inc/US	Jeff Newitt, Peter Lord	<b>12 825 654</b>	2012
6	Paddington	GB/FR	Paul King	<b>10 233 780</b>	2014
7	Sammy's avonturen: De geheime doorgang	BE/US	Ben Stassen	<b>8 394 503</b>	2010
8	Las aventuras de Tadeo Jones	ES	Enrique Gato	<b>7 223 114</b>	2012
9	Sammy's avonturen 2	BE/FR/IT	Vincent Kesteloot, Ben Stassen	<b>6 362 328</b>	2012
10	The House of Magic	BE	Jeremy Degruson, Ben Stassen	<b>6 157 914</b>	2013
11	Die Konferenz der Tiere	DE	Reinhard Klooss, Holger Tappe	<b>5 753 407</b>	2010
12	Tarzan	DE	Reinhard Klooss	<b>5 187 388</b>	2013
13	Kari-gurashi no Arietti	JP	Hiromasa Yonebayashi, Gary Rydstrom	<b>4 776 519</b>	2010
14	Metegol	AR/ES	Juan José Campanella	<b>4 627 986</b>	2013
15	Zambezia	ZA	Wayne Thornley	<b>4 105 611</b>	2012
16	Tri bogatyrya na dalnikh beregakh	RU	Konstantin Feoktistov	<b>4 103 342</b>	2012
17	Arthur et la guerre des deux mondes	FR	Luc Besson	<b>4 094 984</b>	2010
18	Don gato y su pandilla	MX/AR/GB	Alberto Mar	<b>3 539 656</b>	2011
19	Doragon bôru Z: Kami to kami	JP	Masahiro Hosoda	<b>3 413 925</b>	2013
20	Tri bogatyrya i Shamakhanskaya tsaritsa	RU	Sergei Glezin	<b>3 340 877</b>	2010

Note: Films in bold are ranking among the top 20 of all film genres by admissions worldwide excluding US productions.

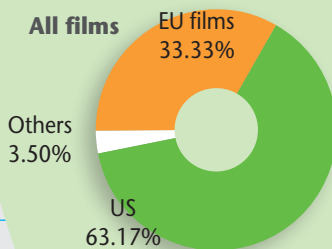
OBS LUMIERE/RENTRAK

	Europe
Population 2014*	726 million
Gross box office 2014 all films	6 407.2 M EUR (8 517.0 M USD)
Admissions 2014 all films	1 147 million
Gross box office 2014 animation	943.5 M EUR (1 254.2 M USD)
Admissions 2014 animation	168.4 million
Average admissions 2010-2014 animation	179.8 million
Screens 2014 (digital screen penetration)	34 773 (84.65%)

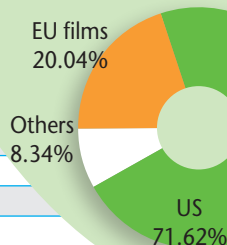
	European Union
Population 2014*	505.94 million
Gross box office 2014 all films	5 327.7 M EUR (7 067.0 M USD)
Admissions 2014 all films	909 million
Gross box office 2014 animation	754.3 M EUR (1 003.2M USD)
Admissions 2014 animation	128.7 million
Average admissions 2010-2014 animation	142.1 million
Screens 2014 (digital screen penetration)	29 395 (85%)

① New films (films produced up to 2 years before year of release)

Market share of animation in the EU by country of origin 2014



Animation



Not surprisingly, the largest European markets were also the largest markets for animation in Europe, with Russia, the UK and France accounting for more than half of the yearly average admissions to animation in Europe between 2010 and 2014 (179.8 million). However, when it comes to the market share of animation in each country, smaller territories such as the three Baltic states, and Slovakia and Slovenia stood out (see page 13) during the same period. In 2014, 14.7% of the overall European admissions went to animation films.

Of the 188 new animation films on release in the European Union in 2014, 107 were produced in the EU. However, the 44 American films on release accounted for most of the box office for animation that year (71.6% of the admissions); whereas EU productions got 20% of the market, well below the performance of EU films across all genres (33.3%).

In terms of production, 250<sup>①</sup> animation films were produced in Europe over the five years analysed, with the 4 main producers (France, Spain, UK, and Sweden) accounting for half of this figure. Some countries with low or medium production volumes stood out as minority co-producers (such as Belgium or Luxembourg).

European animation films achieved most of their admissions outside the national markets. Only 36.3% were generated in the main country of production, compared with 50% in the case of European productions of all genres. Part of the explanation is to be found in their performance in non-national European markets, accounting for

29% of the total admissions to European animation (only 23.7% if we look at films of all genres). However, it is in non-European territories where the difference becomes more evident, with 34.8% of the admissions to European animation generated there compared to only 26.3% of those to European films of all genres.

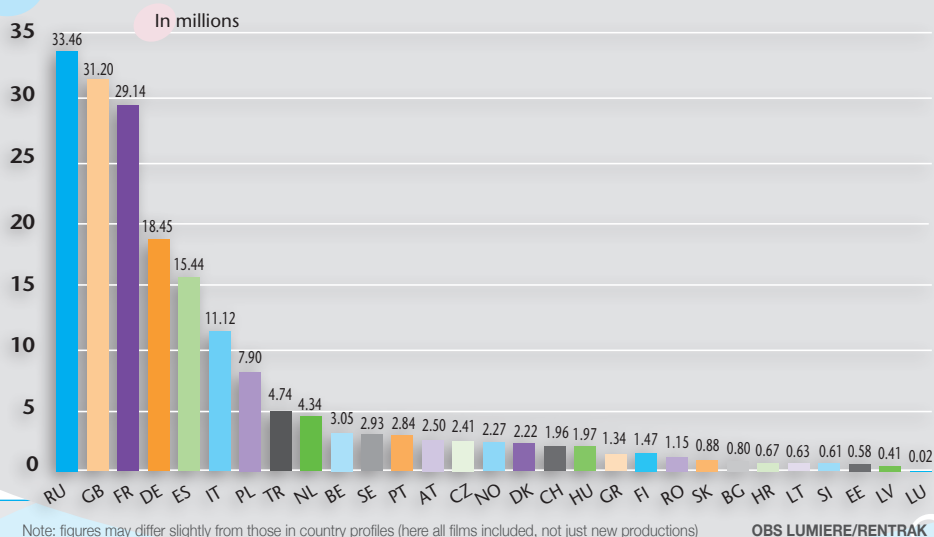
This, along with the high number of average territories in which animation films were released finally proves that, in general, European animation performs better and has a wider circulation in foreign territories than non-animated films. Nonetheless, it is also true that there is an above average concentration of admissions in the world of animation; when it comes to non-national markets, the top 20 European animation films between 2010 and 2014 had 84% of the admissions (with only three GB inward investment productions accounting for slightly more than a third).

Not a single European production made it to the top 30 list of animation films in Europe by admissions, which was completely monopolised by American productions. In turn, only 8 European countries were represented as main producers in the top 30 list of European animation films by admissions in Europe, with only six titles getting more than five million admissions. *Arthur Christmas* and *Paddington* were the only two titles which, with close to the eight million admissions, topped the ranking.

OBS LUMIERE

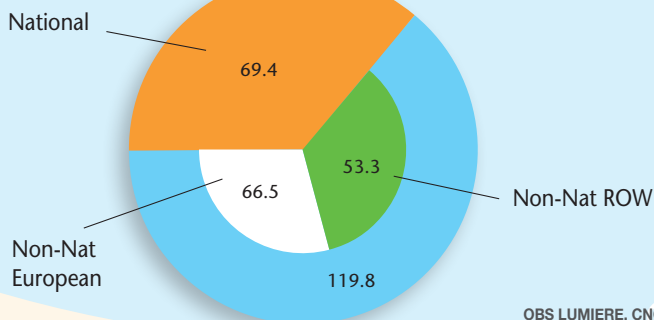
① The figure may increase as films produced in 2014 or before and released in 2015 could not be taken into account.

European markets by admissions to animation films • 2010-2014 average



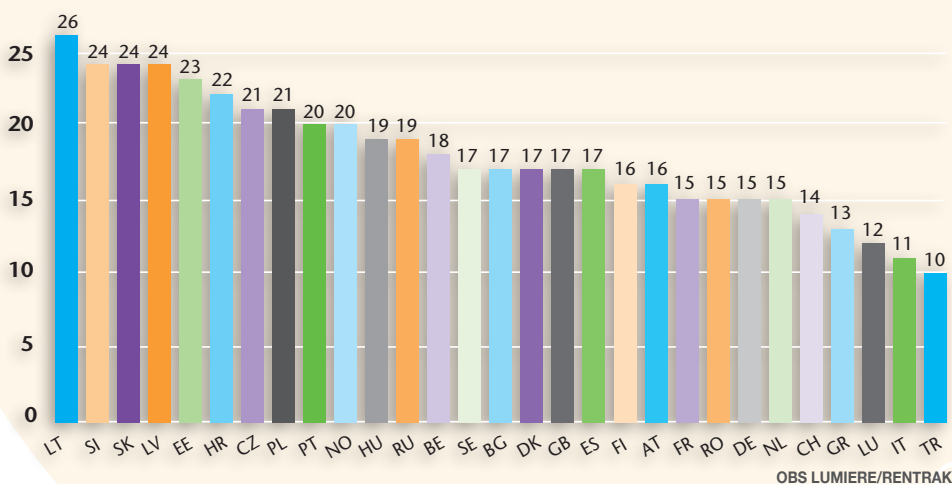
Admissions to European animation films by territory of release • 2010-2014

In millions



European markets by share of admissions to animation films • 2010-2014 average

In %



## Top 30 animation films in Europe by admission • 2010-2014

Rank	Title	Country of origin	Director	Admissions	Year of production
1	Ice Age: Continental Drift	US	Steve Martino, Mike Thurmeier	42 845 050	2012
2	Frozen	US	Chris Buck, Jennifer Lee	34 660 424	2013
3	Shrek Forever After	US	Mike Mitchell	34 150 837	2010
4	Despicable Me 2	US	Pierre Coffin, Chris Renaud	32 306 548	2013
5	Madagascar 3: Europe's Most Wanted	US	C. Vernon, T. McGrath, E. Darnell	31 433 260	2012
6	Toy Story 3	US	Lee Unkrich	29 982 852	2010
7	Puss in Boots	US	Chris Miller	27 073 527	2011
8	Tangled	US	Nathan Greno, Byron Howard	24 005 218	2010
9	How to Train Your Dragon 2	US	Dean DeBlois	23 095 644	2014
10	The Croods	US	Chris Sanders, Kirk De Micco	21 381 212	2013
11	The Smurfs	US	Raja Gosnell	20 979 327	2011
12	Kung Fu Panda 2	US	Jennifer Yuh	19 164 435	2011
13	Rio 2	US	Carlos Saldanha	19 070 569	2014
14	Cars 2	US	John Lasseter, Brad Lewis	18 918 442	2011
15	Monsters University	US	Dan Scanlon	18 810 009	2013
16	Brave	US	S. Purcell, M. Andrew, B. Chapman	18 473 506	2012
17	The Smurfs 2	US	Raja Gosnell	17 840 564	2013
18	The Adventures of Tintin	US/NZ	Steven Spielberg	17 651 829	2011
19	Despicable Me	US	Pierre Coffin, Chris Renaud	17 510 827	2010
20	How to Train Your Dragon	US	Dean DeBlois, Chris Sanders	16 368 857	2010
21	Rio	US	Carlos Saldanha	15 732 399	2011
22	Alvin and the Chipmunks: ...	US	Mike Mitchell	14 789 019	2011
23	Turbo	US	David Soren	13 267 737	2013
24	The Lego Movie	US/AU/DK	Phil Lord, Christopher Miller	13 231 170	2014
25	Wreck-It Ralph	US	Rich Moore	13 029 053	2012
26	The Princess and the Frog	US	Ron Clements, John Musker	12 644 760	2009
27	Hotel Transylvania	US	Genndy Tartakovsky	11 873 875	2012
28	Penguins of Madagascar	US	Eric Darnell, Simon J. Smith	11 501 426	2014
29	Rise of the Guardians	US	Peter Ramsey	11 110 416	2012
30	Megamind	US	Tom McGrath	10 183 778	2010

OBS LUMIERE

## Top 30 European animation films in Europe by admissions • 2010-2014

Rank	Title	Country of origin	Director	Admissions	Year of production
1	Arthur Christmas	GB inc/US	Sarah Smith, Barry Cook	7 979 784	2011
2	Paddington	GB/FR	Paul King	7 913 257	2014
3	Gnomeo and Juliet	GB inc/US	Kelly Asbury	6 840 634	2011
4	The Pirates! Band of Misfits	GB inc/US	Jeff Newitt, Peter Lord	6 837 855	2012
5	Sammy's avonturen: De geheime...	BE/US	Ben Stassen	5 932 296	2010
6	Die Konferenz der Tiere	DE	Reinhard Klooss, Holger Tappe	5 178 482	2010
7	The House of Magic	BE	Jeremy Degruon, Ben Stassen	4 791 192	2013
8	Tri bogatyrya na dainikh beregakh	RU	Konstantin Feoktistov	4 103 342	2012
9	Arthur et la guerre des deux mondes	FR	Luc Besson	4 077 507	2010
10	Las aventuras de Tadeo Jones	ES	Enrique Gato	3 837 677	2012
11	Sammy's avonturen 2	BE/FR/IT	Vincent Kesteloot, Ben Stassen	3 674 447	2012
12	Tri bogatyrya i Shamakhanskaya ...	RU	Sergei Glezin	3 340 877	2010
13	Un monstre à Paris	FR	Bibo Bergeron	2 893 429	2011
14	Astérix: Le domaine des dieux	FR	Louis Clichy, Alexandre Astier	2 820 278	2014
15	Ivan Tsarevich i Seryy Volk 2	RU	Vladimir Toropchin	2 818 938	2013
16	Maya the Bee Movie	DE/AU	Alexs Stadermann	2 647 493	2014
17	Niko 2: Lentäjäljekset	FI/DE/DK...	Kari Juusonen, Jørgen Lerdam	2 440 042	2012
18	Minuscule - La vallée des fourmis ...	FR/BE	Thomas Szabo, Hélène Giraud	2 436 263	2013
19	Tarzan	DE	Reinhard Klooss	2 425 207	2013
20	Planet 51	ES/GB	Javier Abad, Jorge Blanco	2 309 469	2009
21	Justin and the Knights of Valour	ES	Manuel Sicilia	2 047 360	2013
22	Zarafa	FR/BE	Jean-Christophe Lie, R. Bezançon	1 707 242	2012
23	Snezhnaya koroleva	RU	Maksim Sveshnikov, Vlad Barbe	1 541 966	2012
24	Winx Club 3D: Magica Avventura	IT	Iginio Straffi	1 505 951	2010
25	Arthur et la vengeance de Maltazard	FR	Luc Besson	1 494 307	2009
26	Titeuf, le film	FR	Zep	1 410 626	2011
27	Belka i Strelka. Zvezdnye sobaki	RU	Svyatoslav Ushakov, I. Evlannikova	1 361 169	2010
28	Der 7bte Zwerg	DE	Boris Aljinovic, Harald Siepermann	1 342 916	2014
29	Smeshariki: Nachalo	RU	Denis Chernov	1 317 452	2011
30	Gladiatori di Roma	IT	Iginio Straffi	1 307 059	2012

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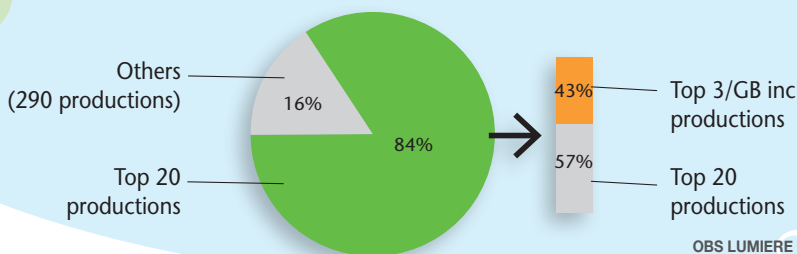
### Top 10 European countries by admissions to animation abroad • 2010-2014



Note: The number of films released in non-national European and non-national non-European territories is detailed for each country over the corresponding section of the column.

① The areas in lighter color in the GB column represent admissions to GBinc productions in each category

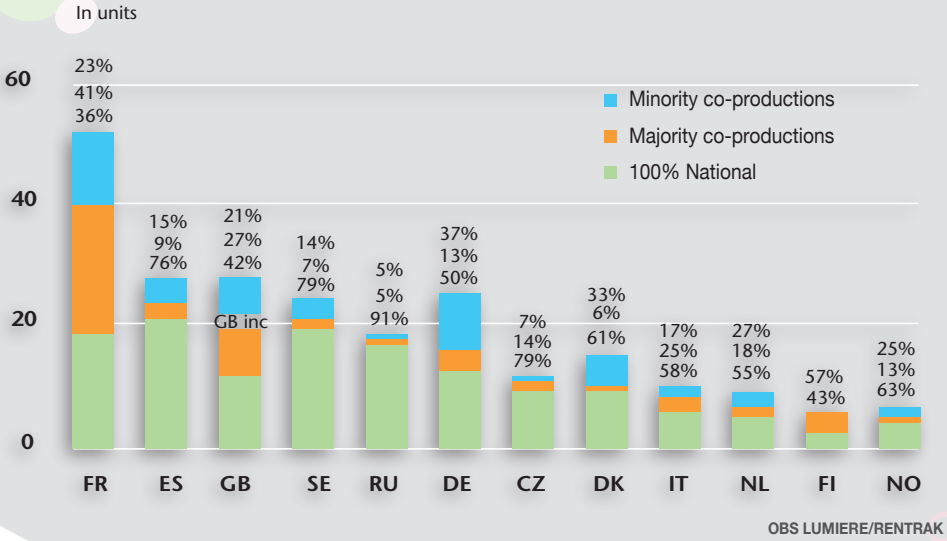
### Non-national admissions structure 2010-2014



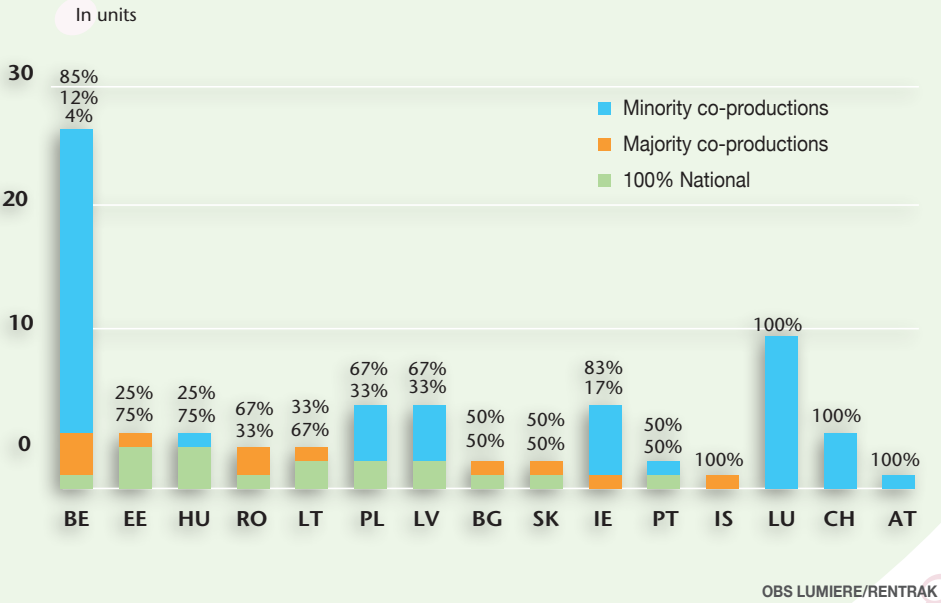
### Top 20 European animation films by admissions abroad • 2010-2014

Rank	Title	Country of origin	Director	Non-national admissions	% Non-national in total admissions	Year of production
1	Gnomeo and Juliet	GB inc/US	Kelly Asbury	19 924 165	88%	2011
2	Arthur Christmas	GB inc/US	S. Smith, B. Cook	13 378 585	79%	2011
3	The Pirates! Band of Misfits	GB inc/US	Jeff Newitt, Peter Lord	10 197 164	80%	2012
4	Sammy's avonturen: De ...	BE/US	Ben Stassen	8 158 331	97%	2010
5	Sammy's avonturen 2	BE/FR/IT	V. Kesteloot, B. Stassen	6 240 152	98%	2012
6	Paddington	GB/FR	Paul King	6 221 135	61%	2014
7	The House of Magic	BE	J. Degruon, B. Stassen	6 112 603	99%	2013
8	Tarzan	DE	Reinhard Klooss	5 420 709	95%	2013
9	Las aventuras de Tadeo ...	ES	Enrique Gato	4 477 980	62%	2012
10	Die Konferenz der Tiere	DE	R. Klooss, H. Tappe	4 324 496	74%	2010
11	Niko 2: Lentäjäljekset	FI/DE/DK/IE	K. Juusonon, J. Lerdam	3 328 911	96%	2012
12	Planet 51	ES/GB	J. Abad, J. Blanco	2 638 858	92%	2009
13	Justin and the Knights of ...	ES	Manuel Sicilia	2 376 172	85%	2013
14	Maya the Bee Movie	DE/AU	Alexs Stadermann	2 139 839	74%	2014
15	Minuscule - La vallée des ...	FR/BE	T. Szabo, H.Giraud	2 118 226	59%	2013
16	Saving Santa	GB/US	A. Seelman, L. Joosen	1 614 352	100%	2013
17	Un monstre à Paris	FR	Bibo Bergeron	1 290 201	42%	2011
18	Arthur et la vengeance de ...	FR	Luc Besson	1 154 698	67%	2009
19	Hetjur Valhallar - Þór	IS/DE/IE	Óskar Jónasson	1 137 650	100%	2011
20	Der 7bte Zwerg	DE	B. Aljinovic, H. Siepermann	1 124 356	73%	2014

European countries by production volume of animation films • 2010-2014



European countries by production volume of animation films (continued) • 2010-2014



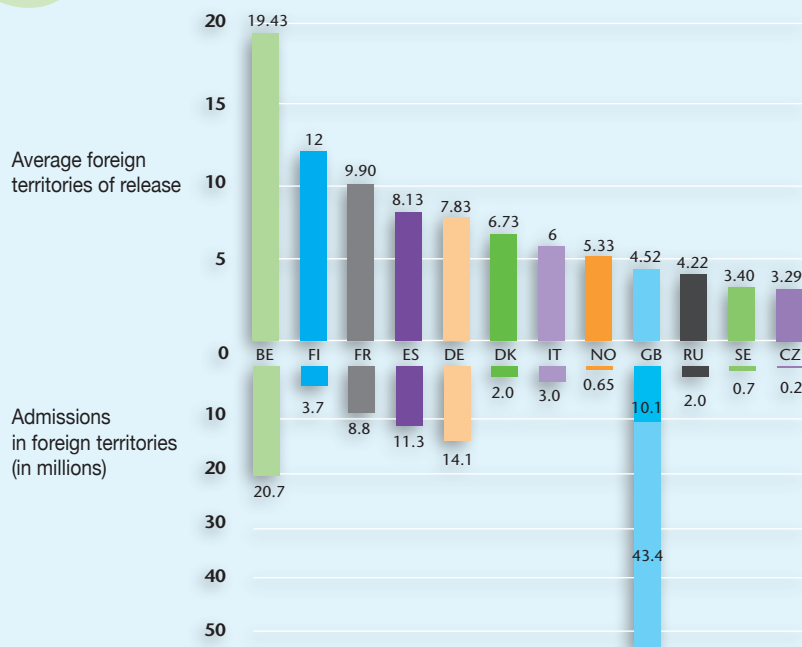
## Top 20 European animation films by number of distribution territories • 2010-2014

Rank	Title	Country of origin	Director	Territories	Non-national admissions	Year of production
1	Arthur Christmas	GB inc/US	Sarah Smith, Barry Cook	41	13 378 585	2011
2	The Pirates! Band of Misfits	GB inc/US	Jeff Newitt, Peter Lord	37	10 197 164	2012
3	Sammy's avonturen: De geheime ...	BE/US	Ben Stassen	36	8 158 331	2010
4	Gnomeo and Juliet	GB inc/US	Kelly Asbury	34	19 924 165	2011
5	The House of Magic	BE	J. Degruon, B. Stassen	33	6 112 603	2013
6	Sammy's avonturen 2	BE/FR/IT	V. Kesteloot, B. Stassen	33	6 240 152	2012
7	Planet 51	ES/GB	Javier Abad, Jorge Blanco	33	2 638 858	2009
8	Tarzan	DE	Reinhard Klooss	30	5 420 709	2013
9	Arthur et la vengeance de ...	FR	Luc Besson	30	1 154 698	2009
10	Paddington	GB/FR	Paul King	25	6 221 135	2014
11	Die Konferenz der Tiere	DE	Reinhard Klooss, Holger Tappe	25	4 324 496	2010
12	Minuscule - La vallée des fourmis...	FR/BE	Thomas Szabo, Hélène Giraud	25	2 118 226	2013
13	Justin and the Knights of Valour	ES	Manuel Sicilia	24	2 376 172	2013
14	Niko 2: Lentäjäväljekset	FI/DE/DK/IE	Kari Juusonen, Jørgen Lerdam	23	3 328 911	2012
15	Arthur et la guerre des deux...	FR	Luc Besson	22	965 706	2010
16	Las aventuras de Tadeo Jones	ES	Enrique Gato	22	4 477 980	2012
17	Zarafa	FR/BE	J-C. Lie, R. Bezançon	22	294 935	2012
18	Un monstre à Paris	FR	Bibo Bergeron	20	1 290 201	2011
19	Maya the Bee Movie	DE/AU	Alexs Stadermann	19	2 139 839	2014
20	Astérix: Le domaine des dieux <sup>①</sup>	FR	Louis Cluchy, Alexandre Astier	7	595 852	2014

① Released in November 2014

OBS LUMIERE

## Average foreign markets of release for animation films by country of production (and admissions generated in those markets) • 2010-2014

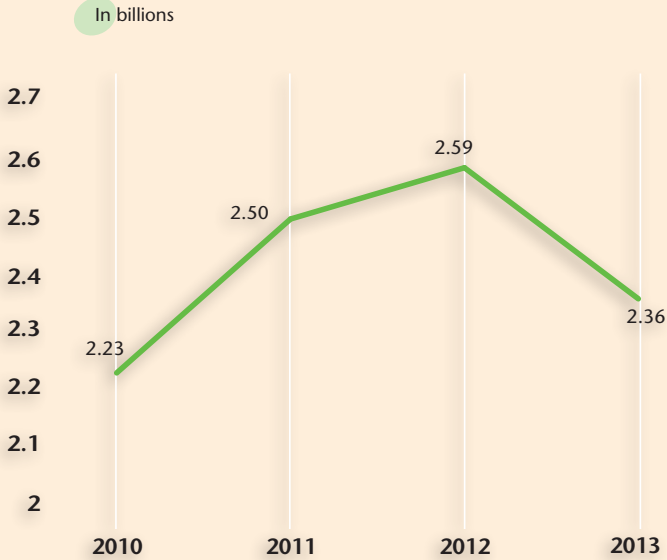


OBS LUMIERE

Note: Excludes films with less than 10 000 admissions abroad and production countries with less than 3 animation films on release during the period covered.

# Europe: structural data

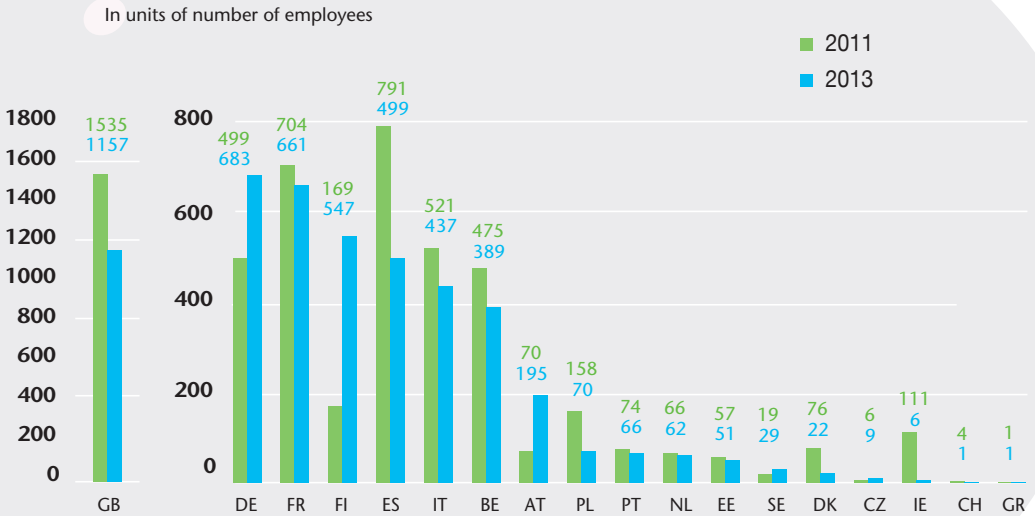
## Aggregate turnover of top European animation companies (in EUR) • 2010-2013 <sup>①</sup>



① 461 European companies have been identified in Amadeus as related to animation activities.

AMADEUS

## Sample data of evolution of aggregate number of employees in top European animation companies • 2011-2013 <sup>①</sup>

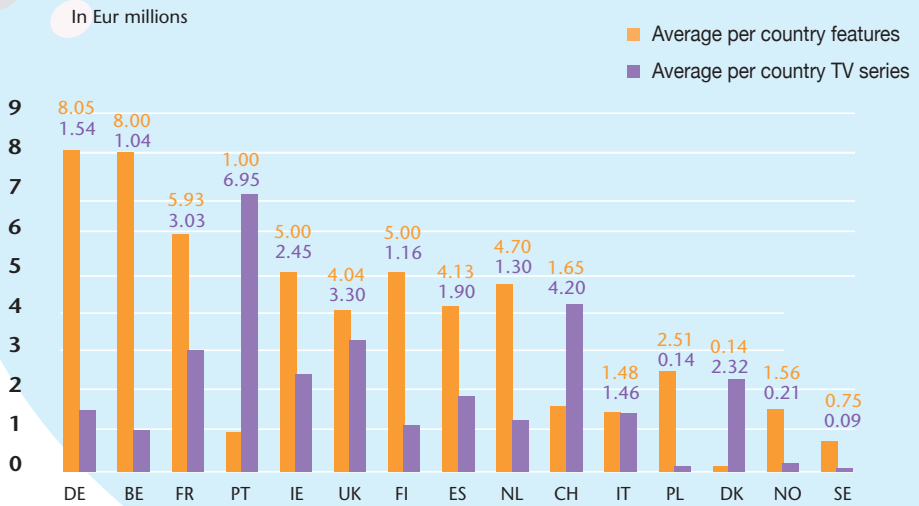


AMADEUS

① 461 European companies have been identified in Amadeus as being related to animation activities. This data is based only on companies in AMADEUS that have reported accounts for these years.



**Average budget of animation feature and TV series by country of production • 2011-2013** <sup>①</sup>



① Based on replies to OBS survey. Only countries that provided answers from more than 5 companies were considered for this graph

**STRUCTURAL DATA**

For the purpose of this section, the Observatory has made use of two distinct sources of information: the Amadeus Database and a questionnaire sent to the European animation industry. To identify the companies involved in animation activities in Europe, the European Audiovisual Observatory has gathered information from: its regular partners, the European and national animation associations, the Creative Europe Desks (Media sub-programme), Cartoon, CITIA and animation festivals. The result is a list of over 8 500 single contacts related to over 7 000 animation-related companies in the European countries covered by this report.

The Amadeus Database (Bureau van Dijk) contains comprehensive information on around 21 million companies: company financials, financial strength indicators, directors, detailed corporate structures, etc. European companies have different legal obligations concerning the provision of official financing data, depending on the country. The European Audiovisual Observatory has identified, among those 21 million, almost 500 European companies related to animation activities, with comprehensive and complete financial and employment information. This was the first limitation. We excluded the largest TV groups as although these groups are involved in animation this part of their activity can be assumed

to be a minor part of their overall activities and breakdowns are difficult to access. Also, some countries provide information on a yearly basis, and others every two years. The period taken into account to compose the previous graphs (2009-2013) was defined by the years for which the data was available. In March 2015, a questionnaire was sent to those 8 500 professionals, and almost 900 answers were received, confirming the industry interest in this project. From those replies, 514 had completed all questions in the survey– and are considered as “useful answers”. The coverage includes data from 29 countries. However, the data collected needs to be increased, in terms of number of answers and in detailed information collected, to ensure coverage of the most comprehensive part of the European animation industry. While being aware that the sources of information for this section are not comprehensive, the European Audiovisual Observatory would like to take the opportunity to request the support of the animation industry by reacting to an upcoming simple questionnaire on the animation industry sources of financing, IP properties and exploitation platforms that will be answered **anonymously**. The deep involvement of the industry will help produce the first clear picture of the current European situation, and thus promote the development of a more robust animation industry.

# Rankings and lists by other indicators

## Films nominated to the European Film Award for Best Animated Feature • 2010-2014

In EUR admissions

Rank	Film	Country of origin	Production year	Director	EUR admissions	Total admissions
3	The Pirates! Band of Misfits	GB inc/US	2012	J. Newitt, Peter Lord	6 837 855	12 825 654
4	Sammy's Adventures: The...	BE/US	2010	Ben Stassen	5 932 296	8 397 022
16	Minuscule - La vallée des...	FR/BE	2013	T. Szabo, H. Giraud	2 436 263	2 819 535
19	Planet 51	ES/GB	2009	J. Abad, J. Blanco	2 309 469	2 860 438
39	<b>The Illusionist</b>	GB/FR	2009	Sylvain Chomet	673 855	1 027 280
44	A Cat in Paris	FR/NL/CH/BE	2010	J. Felicioli, A. Gagnol	593 580	644 405
45	Jack and the Cuckoo-Clock...	FR/BE	2013	Berla, Malzieu, ...	583 540	583 540
46	The Rabbi's Cat	FR/AT	2011	A. Delesvaux, J. Sfar	539 374	553 466
52	Pinocchio	IT/LU/BE/FR	2012	Enzo D'Alò	421 445	490 156
58	<b>Chico &amp; Rita</b>	ES/GB	2010	F. Trueba, J. Mariscal	360 693	421 590
90	<b>Alois Nebel</b>	CZ/DE	2011	Tomás Lunák	160 692	160 692
~	<b>The Congress</b>	IL/BE/DE/LU/FR/PL	2013	Ari Folman	125 962	143 657
138	Wrinkles	ES	2011	Ignacio Ferreras	55 012	55 359
151	<b>The Art of Happiness</b>	IT	2013	Alessandro Rak	41 737	41 737
253	Jasmine	FR	2013	Alain Ughetto	3 874	3 874

Note: Films awarded in bold. Some films may be still grossing in 2015.  
Here "rank" is the position of the film in the entire universe of European animation films.

EUROPEAN FILM ACADEMY/OBS LUMIERE

## Top 20 European films nominated to the Cristal Award for Best Feature Film at the Annecy International Animation Film Festival • 2010-2014

In EUR admissions

Rank	Film	Country of origin	Production year	Director	EUR admissions	Total admissions
9	Tad, the Lost Explorer	ES	2012	Enrique Gato	3 837 677	7 223 114
16	Minuscule: Valley of the Lost...	FR/BE	2013	T. Szabo, H. Giraud	2 436 263	2 819 535
21	Zarafa	FR/BE	2012	J-C Lie, R. Bezançon	1 707 242	1 737 029
40	Santa's Apprentice	FR/AU	2010	Luc Vinciguerra	671 533	704 213
44	A Cat in Paris	FR/NL/CH/BE	2010	J. Felicioli, A. Gagnol	593 580	644 405
45	Jack and the Cuckoo-Clock...	FR/BE	2013	Berla, Malzieu, ...	583 540	583 540
46	<b>The Rabbi's Cat</b>	FR/AT	2011	A. Delesvaux, J. Sfar	539 374	553 466
52	Pinocchio	IT/LU/BE/FR	2012	Enzo D'Alò	421 445	490 156
58	Chico & Rita	ES/GB	2010	F. Trueba, J. Mariscal	360 693	421 590
59	Eleanor's Secret	FR	2009	Dominique Monfery	358 204	358 427
72	The Great Bear	DK	2011	Esben Toft Jacobsen	242 943	322 501
75	Ronal Barbaren	DK	2011	V. Andersen, ...	233 948	233 948
84	The Painting	FR/BE	2011	J-F Laguionie	202 273	207 047
119	My Mommy is in America...	FR/LU	2012	T. Chatel, Marc Boreal	74 502	74 502
123	Approved for Adoption	BE/FR/KR/CH	2012	H. Jung, L. Boileau	69 925	71 504
138	Wrinkles	ES	2011	Ignacio Ferreras	55 012	55 359
151	The Art of Happiness	IT	2013	Alessandro Rak	41 737	41 737
217	The Apostle	ES	2012	Fernando Cortizo	9 698	9 728
223	Metropia	SE/DK/NO/FI	2009	Tarik Saleh	8 789	8 789
228	<b>Crulic: The Path to Beyond</b>	RO/PL	2011	Anca Damian	7 414	7 414

Note: Films awarded in bold. Some films may be still grossing in 2015.  
Here "rank" is the position of the film in the entire universe of European animation films.

ANNECY FESTIVAL/OBS LUMIERE

## European animation films nominated to the Oscar for Best Animated Picture • 2010-2014

In EUR admissions

Rank	Film	Country of origin	Production year	Director	EUR admissions	Total admissions
3	The Pirates! Band of Misfits	GB inc/US	2012	J. Newitt, Peter Lord	6 837 855	12 825 654
39	The Illusionist	GB/FR	2009	Sylvain Chomet	673 855	1 027 280
43	Ernest & Celestine	FR/BE/LU	2012	S. Aubier, V. Patar	611 655	668 418
44	A Cat in Paris	FR/NL/CH/BE	2010	J. Felicioli, A. Gagnol	593 580	644 405
58	Chico & Rita	ES/GB	2010	F. Trueba, J. Mariscal	360 693	421 590
92	Song of the Sea	IE/DK/BE/LU/FR	2014	Tomm Moore	152 394	159 434

Note: Here "rank" is the position of the film in the entire universe of European animation films.

AMPAS/OBS LUMIERE

## Top 20 European animation films in the Europa Cinemas Network • 2010-2014

In EUR admissions

Film	Country of origin	Production year	Director	EUR admissions	Total admissions	
1	The Illusionist	GB/FR	2009	Sylvain Chomet	103 563	317 345
2	Ernest & Celestine	FR/BE/LU	2012	S. Aubier, V. Patar	169 793	312 459
3	A Cat in Paris	FR/NL/CH/BE	2010	J. Felicioli, A. Gagnol	224 559	297 712
4	Sammy's avonturen: De geheime...	BE	2010	Ben Stassen	6 891	193 844
5	Solan og Ludvig: Jul i Flåklypa	NO	2013	Rasmus A. Sivertsen	132 987	189 977
6	The Painting	FR/BE	2011	J-F Laguionie	139 893	168 076
7	Chico & Rita	ES/GB	2010	F. Trueba, J. Mariscal	46 116	167 005
8	Minuscule - La vallée des fourmis...	FR/BE	2013	T. Szabo, H. Giraud	82 394	151 534
9	Kerity, la maison des contes	FR	2009	Dominique Monfery	64 326	148 275
10	The Rabbi's Cat	FR/AT	2011	A. Delesvaux, J. Sfar	125 738	141 511
11	Paddington	GB	2014	Paul King	30 461	140 572
12	Le Jour des Corneilles	FR/LU/CA/BE	2011	J-C Dessaint	92 599	108 810
13	The House of Magic	BE	2013	B. Stassen, Degruson	4 410	106 515
14	Kirikou et les hommes et les...	FR	2012	Michel Ocelot	85 940	105 696
15	Knerten gifter seg	NO	2010	Martin Lund	68 371	99 381
16	Zarafa	FR/BE	2012	J-C Lie, R. Bezançon	63 058	95 556
17	Tad, the Lost Explorer	ES	2012	Enrique Gato	34 943	85 878
18	Niko 2 - Lentäjävölkjaset	FI/DE/DK/IE	2012	J. Lerdam, Juusonen	79	83 923
19	The Gruffalo's Child	GB/DE	2011	Heidschötter, Weiland	3 947	83 779
20	Loulou - L'incroyable secret	FR/BE/HU	2013	Eric Omond	75 537	81 627

Note: Here "rank" is the position of the film in the top 20 animation films in the Europa Cinemas Network.

EUROPA CINEMAS/OBS LUMIERE

Population 2014*	65,8 million
GDP per capita 2014*	45 384 USD

## Film landscape 2014

Gross box office all films	1 215,6 M EUR	1 615,90 bn USD
Admissions all films	190,57 million	
Gross box office animation	164,89 M EUR	219,19 bn USD
Admissions animation	25.85 million	
Average admissions animation 2010-2014	28.73 million	
Screens (digital screen penetration)	5 653 (100%)	

## TV landscape 2014

Television households (2013)	26.8 million
Digital TV households (2013)	95%

		Free to air	Public	Private
National children's channels	13	1		13
Children's channels targeting other countries	2			
Foreign children's channels available	15			14
National film channels	19			23
Film channels targeting other countries				
Foreign film channels available	21 <sup>①</sup>			

① Mainly over IPTV services

CSA/MAVISE/OBS

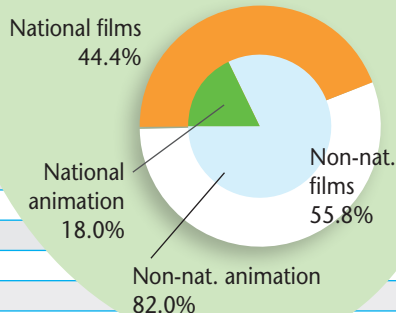
Admissions to animation films in France in 2014 totaled 25.9m in 2014, below the annual average of 28.7m admissions in the period 2010-2014, but rising for the first time since 2011 and representing a market share of almost 14% of all admissions in the country, the highest in the European Union countries. Gross Box office (€1.3b) also topped European lists; from this, 13,6% came from animation tickets (165m). On the other hand, admissions to French animation in the world in 2013 (2.2m) had decreased 61% compared to the average 5.6m admissions in the period 2010-2014. It since increased by 41% in 2014 compared to that same average. With 47 films produced in 5 years (2010-2014), and an average of 9.4 films per year, France has the highest production capacity in the European Union. Nevertheless, there has been a slight though constant decrease since 2011's peak of 13 films produced (-15% from 2011 to 2013) up to the 7 animation features produced (and released theatrically) in 2014. It should however be taken into account that some of the newest productions have or will access the theaters in 2015.

No French production has entered the Top 10 of animation films in 2014 by admissions in the country, the first national being *Arthur et la guerre des deux mondes*, which comes in 13<sup>th</sup> position. The film, produced in 2010, has accumulated over 4m admissions, 75% of them in France.

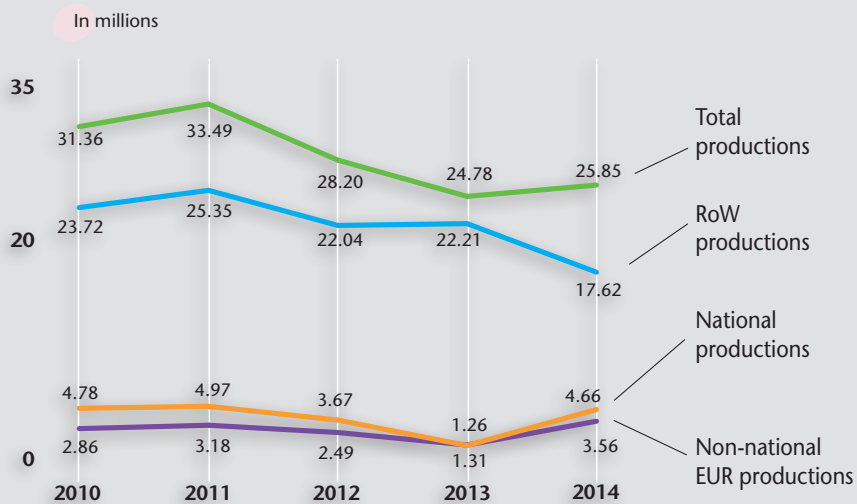
On page 25, the first two graphs are based on data from the CNC (Centre national du cinéma et de l'image animée) publication *Marché de l'animation en 2013*. The first graph deals with the total volumes on animation broadcast on TF1, France 2, France 3, Canal+, France 5, M6, in a time series from 2009 to 2013. The data shows the stability of broadcast volume over time and that TF1, France 3 and France 5 are the major broadcasters of animation among the generalist channels. The second graph outlines the proportions of animation broadcast on these channels by origin (French, other European and US). The data is aggregated and does not show a breakdown channel by channel. According to the CNC, the production volume of TV series increased in 2012 by 63% compared to the previous year, with a total of 20 257 minutes of French TV series produced (+42%). In contrast, in 2013 a total of 54 series (-19%) were produced representing 17 745 minutes (-12%).

The third graphic based on data from ROVI International shows proportions of European animation on a large sample of channels (19 generalist/entertainment and 15 children) in 2013. The highest proportion of French animation appears on the French channels (in particular Canal J, Gulli, Mangas and Teletoon+).

Market shares 2014



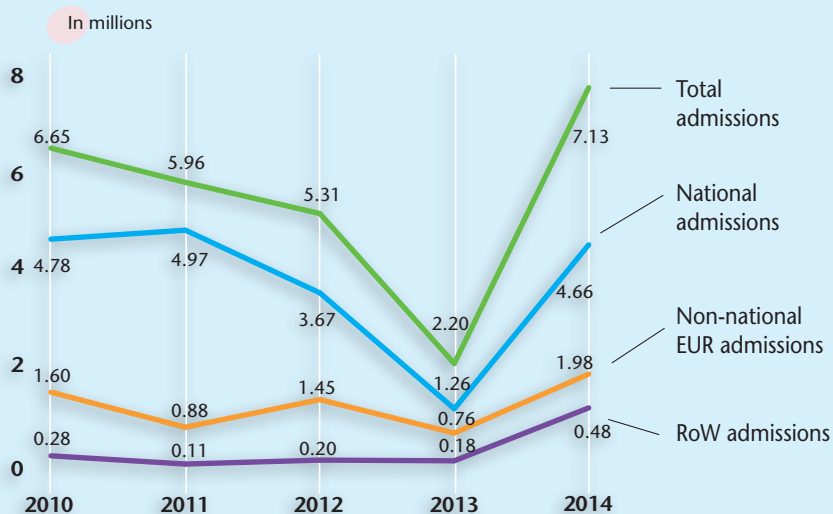
### Admissions to animation films in France by country of production • 2010-2014<sup>①</sup>



① It only includes new productions (films produced up to two years before the release year).

OBS LUMIERE/CNC

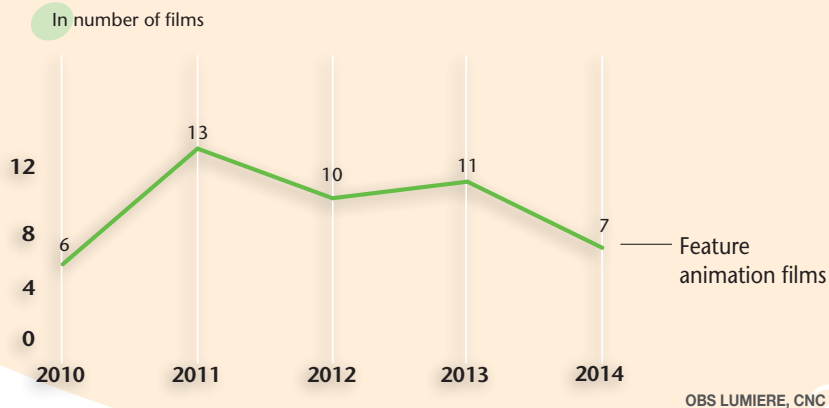
### Admissions to French animation films by release market • 2010-2014<sup>①</sup>



① It only includes new productions (films produced up to two years before the release year).

OBS LUMIERE, CNC

## Production volume • 2010-2014



## Top 10 animation films by admissions in France • 2010-2014

Rank	Title	Country of origin	Director	Distributor	Admissions	Year of production
1	Ice Age: Continental Drift	US	S. Martino, M. Thurmeier	20th Century Fox (FR)	6 625 903	2012
2	The Adventures of Tintin	US/NZ	Steven Spielberg	Sony Pictures .. (FR)	5 308 461	2011
3	Despicable Me 2	US	P. Coffin, C. Renaud	Universal Pictures	4 655 036	2013
4	Shrek Forever After	US	Mike Mitchell	Paramount .. (FR)	4 625 118	2010
5	Toy Story 3	US	Lee Unkrich	Walt Disney ..(FR)	4 353 253	2010
6	Puss in Boots	US	Chris Miller	Paramount .. (FR)	3 858 651	2011
7	The Princess and the Frog	US	R. Clements, J. Musker	Walt Disney .. (FR)	3 842 600	2009
8	Tangled	US	N. Greno, B. Howard	Walt Disney ..(FR)	3 550 281	2010
9	Madagascar 3: Europe's ...	US	C. Vernon, T. McGrath, ..	Paramount ..(FR)	3 412 055	2012
10	How to Train Your Dragon 2	US	Dean DeBlois	20th Century Fox (FR)	3 375 600	2014

OBS LUMIERE

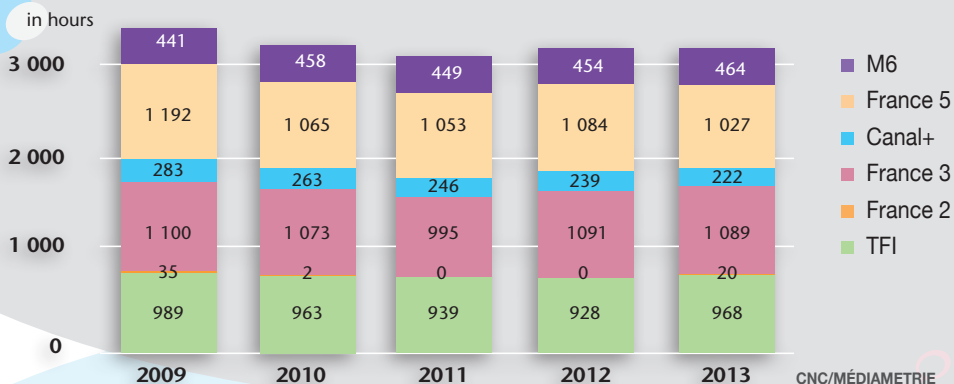
## Top 10 French animation films by admissions in France • 2010-2014

Rank	Title	Country of origin	Director	Distributor	Admissions	Year of production
1	Arthur et la guerre ....	FR	Luc Besson	EuropaCorp	3 131 880	2010
2	Astérix: Le domaine des dieux <sup>①</sup>	FR	L. Clichy, A. Astier	SND Films	2 224 426	2014
3	Un monstre à Paris	FR	Bibo Bergeron	EuropaCorp	1 766 468	2011
4	Minuscule - La vallée des...	FR/BE	T. Szabo, H. Giraud	Le Pacte	1 499 488	2013
5	Zarafa	FR/BE	J.-C. Lie, R.Bezançon	Pathé Distribution	1 442 094	2012
6	Titeuf, le film	FR	Zep	Pathé Distribution	1 267 524	2011
7	Kirikou et les hommes ...	FR	Michel Ocelot	StudioCanal(FR)	1 078 859	2012
8	L'apprenti Père Noël	FR/AU	Luc Vinciguerra	Gaumont ...	605 032	2010
9	Arthur et la vengeance ...	FR	Luc Besson	EuropaCorp	570 800	2009
10	Jack et la mécanique du coeur	FR/BE	S. Berla, M.Malzieu, S. Berla	EuropaCorp	562 347	2013

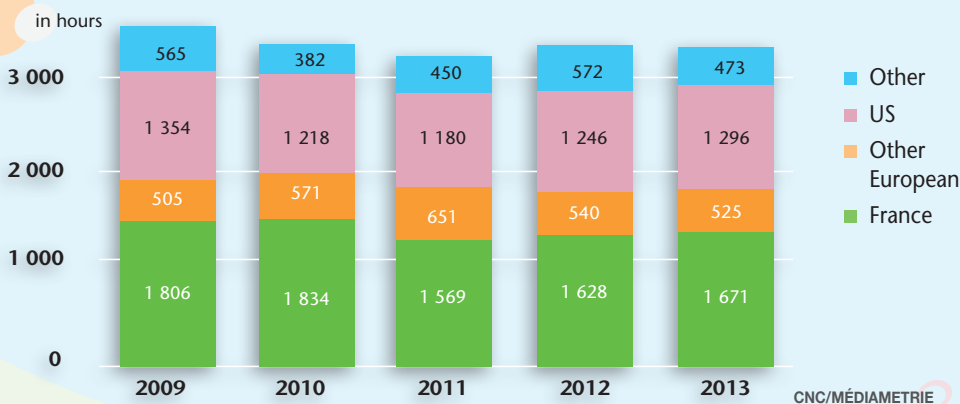
① Films still grossing in 2015

OBS LUMIERE

France: CNC data on TV animation volume on six generalist channels • 2009-2013

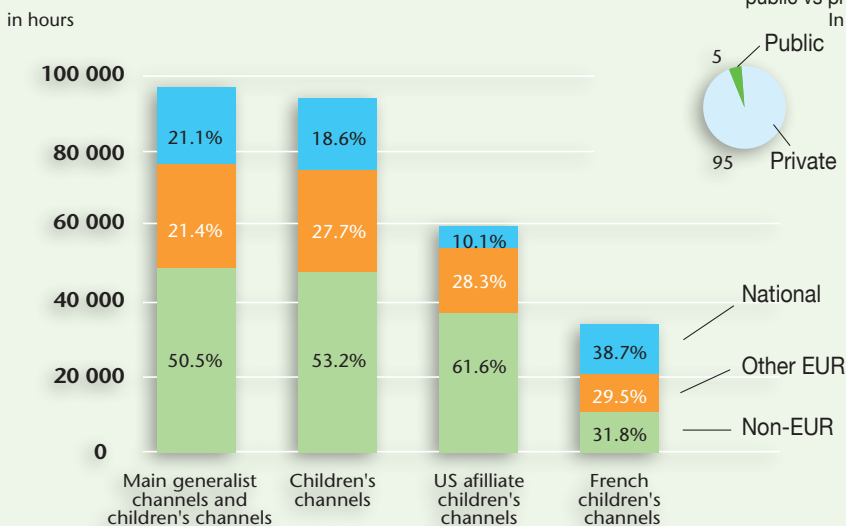


France: CNC data on origin of TV and feature film animation by origin • 2009-2013



Note: based on TF1, France 2, France 3, Canal+, France 5, M6

France: national, European and non-European animation on main TV channels and children's channels 2013



Note: on the basis of 19 generalist and entertainment channels and 15 children's channels

ROI INTERNATIONAL SOLUTIONS

Population 2014*	80.8 million
GDP per capita 2014*	47 201 USD

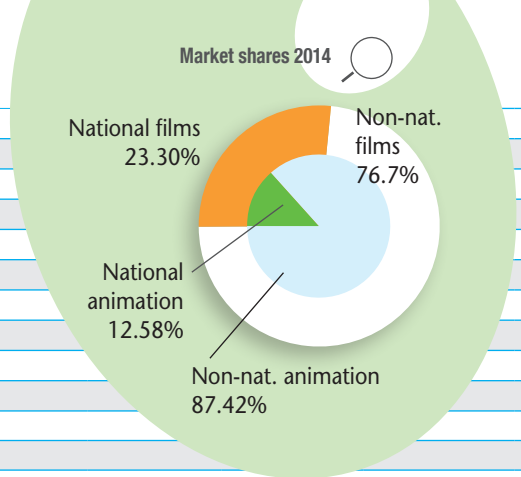
## Film landscape 2014

Gross box office all films	962.3 M EUR (1 279.2 bn USD)
Admissions all films	119.5 million
Gross box office animation	115.5 M EUR (153.6 bn USD)
Admissions animation	15.6 million
Average admissions animation 2010-2014	18.3 million
Screens (digital screen penetration)	4 637 (90%)

## TV landscape 2014

Television households (2013)	35.8 million
Digital TV households (2013)	84%

		Free to air	Public	Private
National children's channels	12	4	1	11
Children's channels targeting other countries	2			
Foreign children's channels available	7			
National film channels	22			22
Film channels targeting other countries	1			
Foreign film channels available	2			



Germany ranks third in the European Union in terms of global BGO (962.3m) and admissions (119.5m). In 2014, admission to animation features rose to 15.6m, a 15% decrease compared to the average for the 5 year period 2010-2014 (18.3m). Admission to animation films represent 13% of all theatrical tickets, and the market share of German animation in Germany was 12.6% in 2014.

No German animation film has made it to the top 10 most grossing features in 2014, although the top national title *Die Konferenz der Tiere* (2010) reached 20th position. Newer productions like *Maya the Bee* (2014) or *Der 7bte Zwerg* (2014) are still grossing and might reach higher positions in the future. German average performance, by admissions in the world in 2010-2014, is set at 4.2m. In 2014, after an extremely low performance in 2013, admissions grew 258% above the period average. This phenomenon is linked to the fabulous results abroad of three productions: *Tarzan* (2013), *Maya the Bee* (2014) and *Der 7bte Zwerg* (2014), which together achieved more than 10m admissions.

Germany has produced 20 animation features released theatrically in the period 2010-2014, which ranks it fourth in the European Union in production capacity. The peak of 6 films produced in 2012 corresponds to a year with a surprising drop in admissions to local animations in the 5 years period, (where total admissions to animation films dropped 16% compared to the previous year). This is followed in 2013 by a remarkable rise of admissions by 29% (up to 14.6m). The increase of other

European non-national admissions in Germany in 2012 is due to the success of co-production *The Pirates! Band of Misfits* (2012).

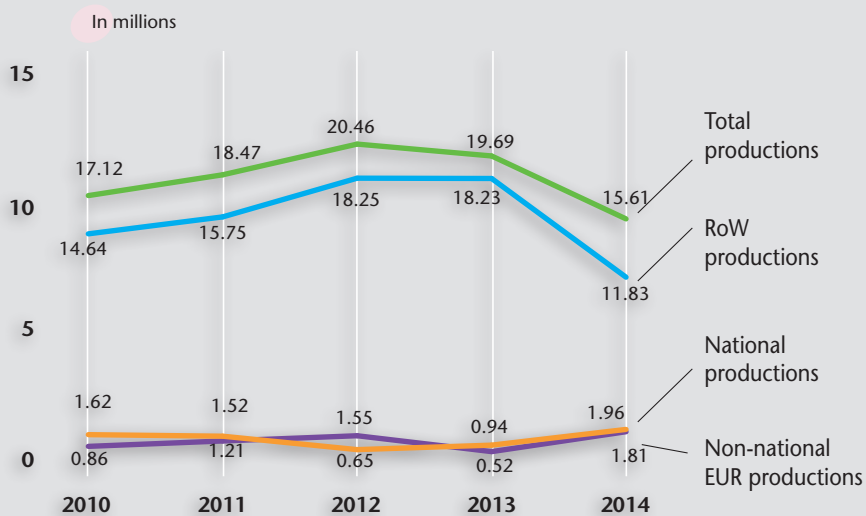
Regarding television, an analysis of the origin of TV animation on television in Germany was carried out using data from ROVI International. Page 29 shows the trends over time in animation broadcast on the main channels (ARD, BF, ZDF, ARTE, Kabel 1, Pro 7, RTL, RTL 2, Sat.1 and Tele5). There was a significant reduction in total hours of animation between 2009 and 2013. The reduced hours can mainly be explained by major reductions of Japanese animation on RTL and Tele5. The most important children's channels in Germany are KiKA and Super RTL. Public channel KiKA is distributed in 13 European countries, while Super RTL (50% owned by Disney) is available in 18 countries. The second graphic focuses on 2013 and adds 16 children's channels including national channels (KiKA, Super RTL, RIC TV, Your Family Entertainment - now Fix&Foxi - and Junior) and all the major pan-European brands. The proportion of German animation on German TV is very low overall with the highest proportion of almost 15% on the national children's channels listed above.

Further data on the origin of programming on the German children's channels can be seen on pages 58 and 59.

FFA/OBS LUMIERE/ARD JAHRBUCH/OBS MAVISE

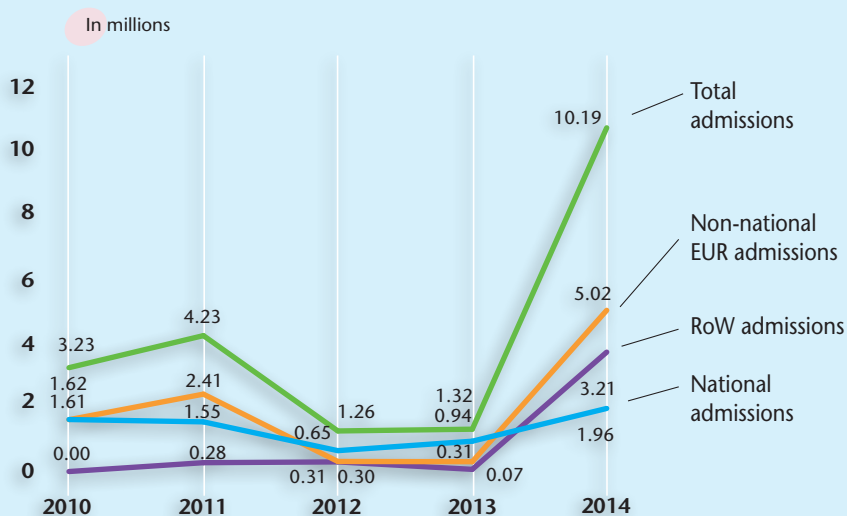
OBS LUMIERE/OBS MAVISE/  
ROVI INTERNATIONAL SOLUTIONS



Admissions to animation films in Germany by country of production • 2010-2014<sup>①</sup>

① It only includes new productions (films produced up to one year before the release year).

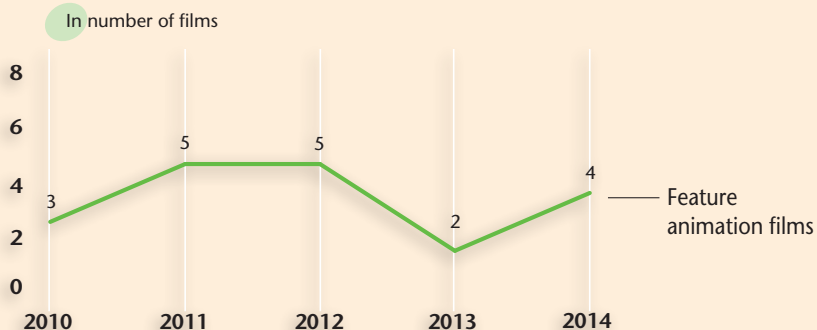
OBS LUMIERE

Admissions to German animation films by release market • 2010-2014<sup>①</sup>

① It only includes new productions (films produced up to two years before the release year).

OBS LUMIERE

## Production volume • 2010-2014<sup>①</sup>



① FFA only releases figures on the top 100 films and top 100 German films in the country over each year. Therefore, German feature animation not included on those lists cannot be taken into account unless released in other tracked countries.

OBS LUMIERE

## Top 10 animation films by admissions in Germany • 2010-2014

Rank	Title	Country of origin	Director	Distributor	Admissions	Year of production
1	Ice Age: Continental Drift	US	S. Martino, M. Thurmeier	20th Century Fox (DE)	6 694 620	2012
2	Frozen	US	Chris Buck, Jennifer Lee	Walt Disney ... (DE)	4 758 768	2013
3	Madagascar 3: Europe's ...	US	C. Vernon, T. McGrath,...	Paramount (DE)	3 956 925	2012
4	Tangled	US	N. Greno, B. Howard	Walt Disney ... (DE)	3 931 585	2010
5	Despicable Me 2	US	P.Coffin, C. Renaud	Universal Pictures (DE)	3 687 419	2013
6	Puss in Boots	US	Chris Miller	Paramount (DE)	3 193 804	2011
7	How to Train Your Dragon 2	US	Dean DeBlois	20th Century Fox (DE)	2 723 730	2014
8	The Smurfs	US	Raja Gosnell	Sony Pictures ... (DE)	2 701 742	2011
9	Despicable Me	US	P. Coffin, C. Renaud	Universal Pictures (DE)	2 513 345	2010
10	The Smurfs 2	US	Raja Gosnell	Sony Pictures ... (DE)	2 513 159	2013

OBS LUMIERE

## Top 10 German animation films by admissions in Germany • 2010-2014

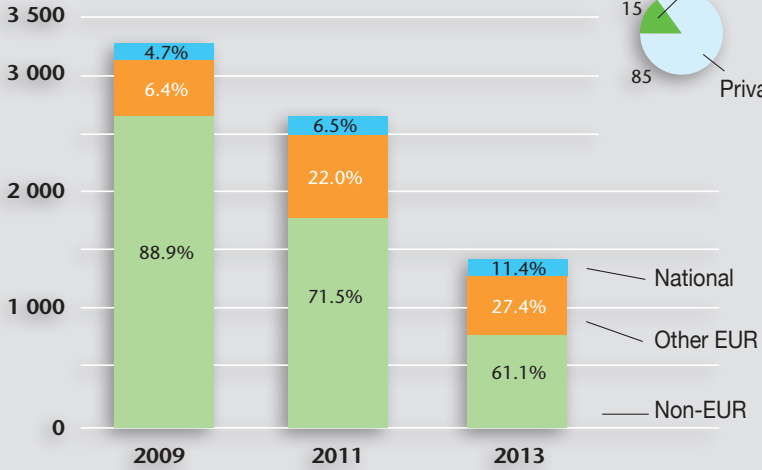
Rank	Title	Country of origin	Director	Distributor	Admissions	Year of production
1	Die Konferenz der Tiere	DE	R. Klooss, H.r Tappe	Constantin Film (DE)	1 514 087	2010
2	Maya the Bee Movie	DE/AU	Alexs Stadermann	Universum Film	763 807	2014
3	Prinzessin Lillifee und ...	DE/FR	A. Niebuhr, H. Weiland	Universum Film	626 097	2011
4	Ritter Rost - Eisenhart und ...	DE	T. Bodenstein, H. Weiland, ...	Universum Film	610 215	2012
5	Der kleine Rabe Socke	DE	U. von Münchow-Pohl, ...	Universum Film	486 481	2012
6	Werner - Eiskalt!	DE	Gernot Roll	Constantin Film (DE)	438 056	2011
7	Der 7bte Zwerg	DE	B. Aljinovic, H. Siepermann	Universal ... (DE)	412 286	2014
8	Lauras Stern und ...	DE	Thilo Rothkirch, ...	Warner Bros. (DE)	373 807	2011
9	Der kleine Drache Kokosnuss (1)	DE	Hubert Weiland, Nina Wels	Universum Film	349 687	2014
10	Keinohrhasse und Zweiohrküken	DE	T.Schweiger, M. Gräfin ...	Warner Bros. (DE)	307 534	2013

OBS LUMIERE

**Germany: National, European and non-European animation on main TV channels (reaching 70% of audience)**

**European animation on TV 2013: public vs private**

In hours

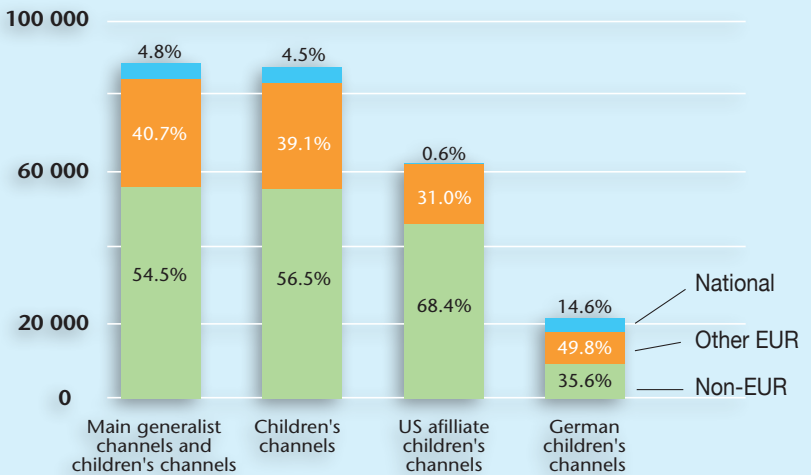


Note: on the basis of 10 generalist and entertainment channels

ROVI INTERNATIONAL SOLUTIONS/MAVISE

**Germany: National, European and non-European animation on main TV channels and children's channels • 2013**

In hours



Note: on the basis of 10 generalist and entertainment channels and 16 children's channels

ROVI INTERNATIONAL SOLUTIONS/MAVISE

Population 2014*	60.8 million
GDP per capita 2014*	35 512 USD

**Film landscape 2014**

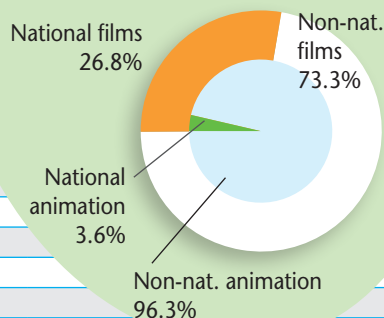
Gross box office all films	551.8 M EUR (733.5 bn USD)
Admissions all films	91.2 million
Gross box office animation	72.42 M EUR (96.32 bn USD)
Admissions animation	11.97 million
Average admissions animation 2010-2014	10.94 million
Screens ( <a href="#">digital screen penetration</a> )	2 850 (76%)

**TV landscape 2014**

Television households (2013)	25.3 million
Digital TV households (2013)	100%

		Free to air	Public	Private
National children's channels	23	5	3	20
Children's channels targeting other countries	0			
Foreign children's channels available	5			
National film channels	38	1	2	36
Film channels targeting other countries	0			
Foreign film channels available	4			

Market shares 2014



OBS MAVISE/OBS LUMIERE

In Italy, animation features films grossed over €72m in 2014, which represents 13% of total GBO in the country. Admissions to animation in 2014 (12m) have experienced an increase of over 9% compared to the average in the period 2010-2014 (10.9m). But local animation had low results, with an average market share in 2010-2014 of less than 3% of admissions (3,6% in 2014). 2011 was a dramatic year for Italian animations in Italy, with only 0,01% of market share. European animation films are not winning a major part of market share either, with an annual average of 7,5%, but in 2014 this rose to 11,7% (increasing by 57% the value for 2013). Top 10 grossing animation films in Italy do not include any local titles, the first Italian animation feature on the list being *Gladiatori di Roma*, (2012) which comes in 37th position.

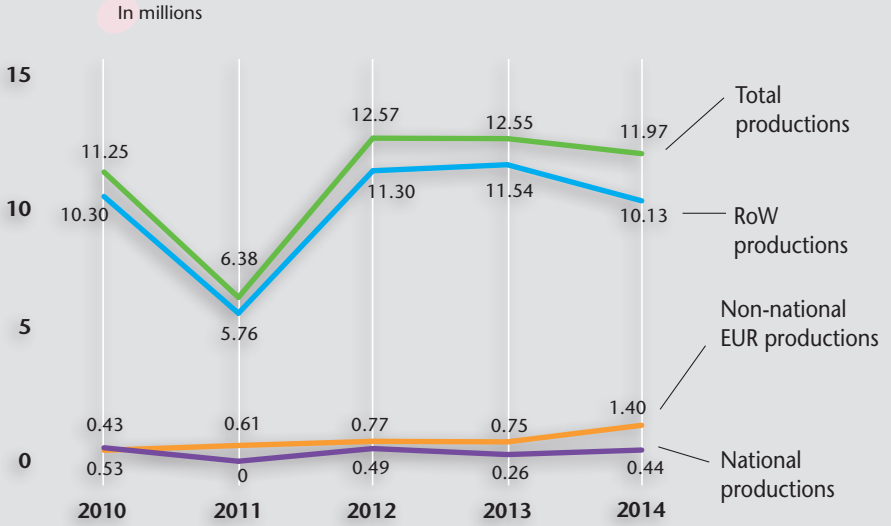
Production volumes in Italy have been very low in the last 5 years, with a total of 10 films produced and released theatrically. The evolution curve shows cyclic production periods. Higher peaks correspond to: *the Winx Club* and *Cuccioli* first films of their sagas in 2010; *Gladiatori di Roma* and *Pinocchio* in 2012; and to the latest *Winx Club* and *Cuccioli* sequels in 2014. This is also reflected in the graph for admissions to Italian animations: a peak on national market for the same year of production, and a peak abroad for the year after its local release. A new phenomenon seems to be taking place in several European countries, which

is the theatrical premiere of successful TV series' new seasons or episodes. In Italy, such a screen preview organized by Disney Junior in October 2014 made almost 55.000 admissions.

The graphs on page 33 provide an analysis of the origin of TV animation on television in Italy using data from ROVI International. The first shows the trends over time in animation broadcast on the main channels (Canale 5, Italia 1, RAI1, RAI2, RAI3, Rete 4, La 7). There was a significant reduction in total hours of animation between 2009 and 2013, in particular of national productions. This can be partly explained by a drop in animation on the RAI channels as the programming may have migrated to the two RAI children's channels RAI Gulp and RAI Yoyo. These channels and other children's channels are included in the second graph illustrating the picture in 2013. The data here shows that Italian children's channels contain an impressive level of European content including British, French and Italian. According to industry sources, Italian TV productions are growing fast due to an increase in RAI investment in recent years. Successful and worldwide popular Italian TV series include *Winx Club*, *Mia and Me* (German/Italian) and *Marco Polo* (Italian/Chinese).

MIBACT, MAVISE, ROVI, OBS

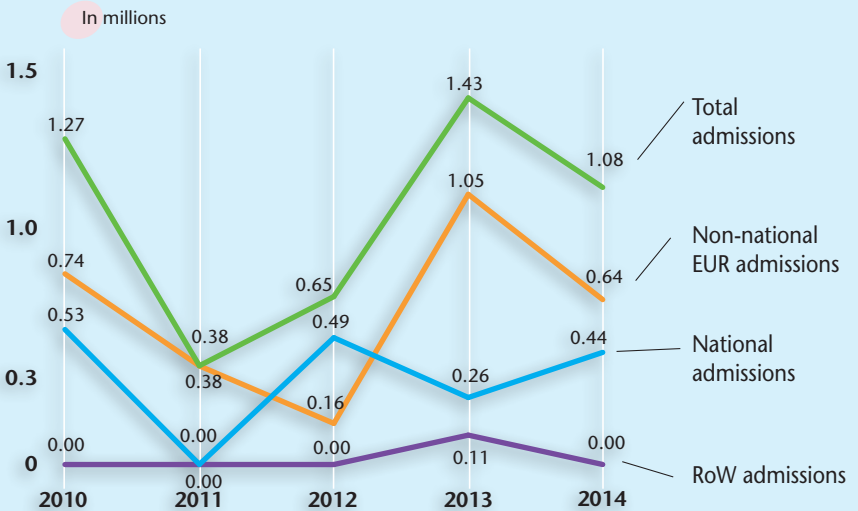
### Admissions to animation films in Italy by country of production • 2010-2014<sup>①</sup>



① It only includes new productions (films produced up to two years before the release year).

OBS LUMIERE, DG CINEMA-MIBACT

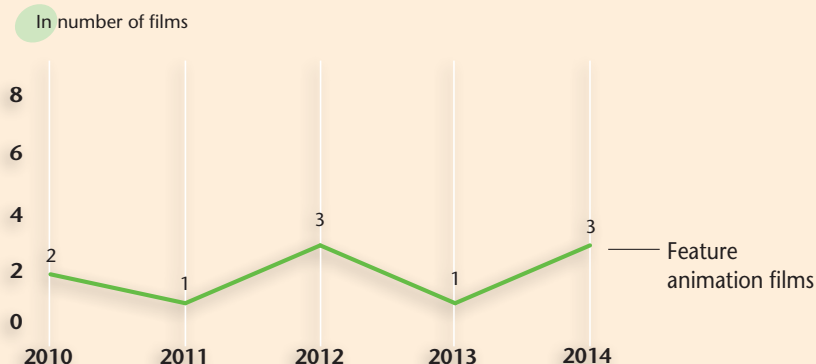
### Admissions to Italian animation films by release market • 2010-2014<sup>①</sup>



① It only includes new productions (films produced up to two years before the release year).

OBS LUMIERE, DG CINEMA-MIBACT

## Production volume • 2010-2014



OBS LUMIERE, DG CINEMA-MIBACT

## Top 10 animation films by admissions in Italy • 2010-2014

Rank	Title	Country of origin	Director	Distributor	Admissions	Year of production
1	Madagascar 3: Europe's...	US	C. Vernon, T. McGrath, ...	Universal (IT)	3 044 609	2012
2	Frozen	US	C. Buck, J. Lee	Walt Disney (IT)	2 916 915	2013
3	Despicable Me 2	US	P. Coffin, C. Renaud	Universal (IT)	2 401 598	2013
4	Ice Age: Continental Drift	US	S. Martino, M. Thurmeier	20th Century Fox (IT)	2 328 546	2012
5	Shrek Forever After	US	Mike Mitchell	Universal (IT)	2 200 358	2010
6	The Croods	US	C. Sanders, K. De Micco	20th Century Fox (IT)	1 700 087	2013
7	Toy Story 3	US	Lee Unkrich	Walt Disney (IT)	1 688 597	2010
8	Despicable Me	US	P. Coffin, C. Renaud	Universal (IT)	1 543 807	2010
9	Monsters University	US	Dan Scanlon	Walt Disney (IT)	1 423 342	2013
10	Tangled	US	N. Greno, B. Howard	Walt Disney (IT)	1 349 722	2010

OBS LUMIERE

Top 9 Italian animation films by admissions in Italy • 2010-2014 <sup>①</sup>

Rank	Title	Country of origin	Director	Distributor	Admissions	Year of production
1	Gladiatori di Roma	IT	Iginio Straffi	Medusa Film	495 032	2012
2	Winx Club 3D: Magica Avventura	IT	Iginio Straffi	Medusa Film	403 487	2010
3	Winx Club: Il mistero degli abissi	IT	Iginio Straffi	01 Distribution	319 593	2014
4	Pinocchio	IT/LU/BE/FR	Enzo D'Alò	Lucky Red	226 016	2012
5	Cuccioli e il codice di Marco Polo	IT/ES	S. Manfio, F. Manfio	01 Distribution	122 850	2010
6	Disney Junior Party <sup>②</sup>	IT	Several <sup>②</sup>	Walt Disney (IT)	54 933	2014
7	Cuccioli - Il paese del vento	IT	Sergio Manfio	01 Distribution	52 503	2014
8	L'arte della felicità	IT	Alessandro Rak	Istituto Luce ...	41 737	2013
9	Tormenti - Film disegnato	IT	Filiberto Scarpelli	Lucky Red	218	2011

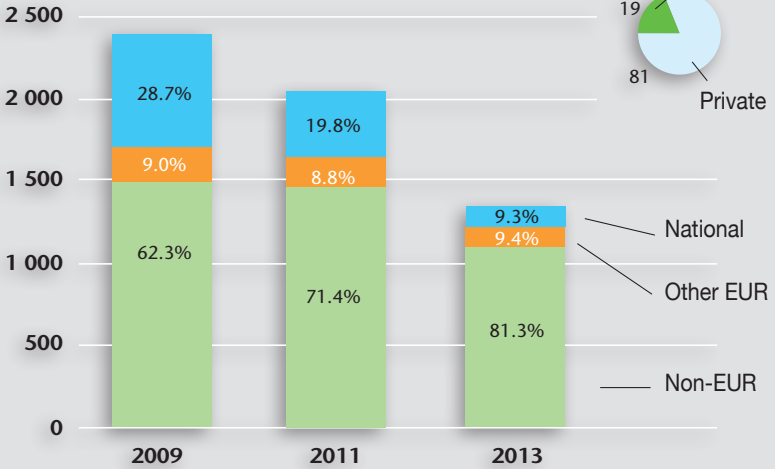
<sup>①</sup> Only 9 films in Italy meet the criteria.

<sup>②</sup> Preview on screen in Oct. 2014 of 3 Disney Channel TV series (Jake and the Neverland Pirates, Doc McStuffins and Princess Sofia). No names of directors provided.

OBS LUMIERE

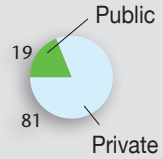
**Italy: National, European and non-European animation on main TV channels**  
(reaching 70% of audience)

In hours



**European animation on TV 2013:**  
public vs private

In %

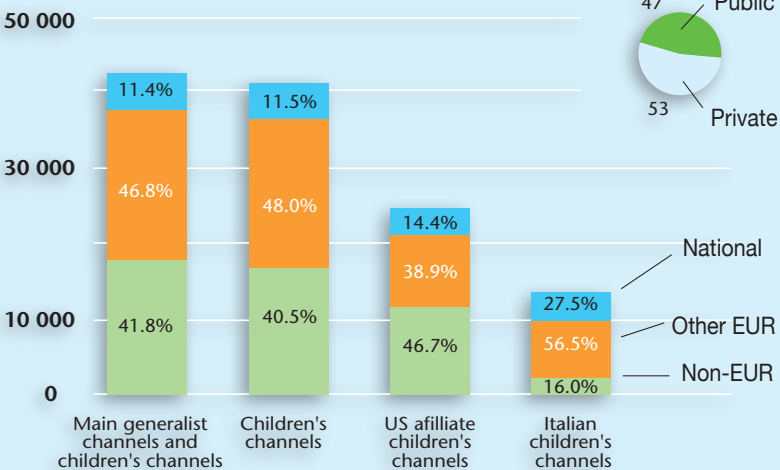


Note: on the basis of Canale 5, Italia 1, RAI1, RAI2, RAI3, Rete 4, and La 7.

ROVI INTERNATIONAL SOLUTIONS

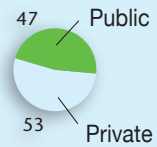
**Italy: national, European and non-European animation on main TV channels and children's channels 2013**

In hours



**European animation on all TV 2013:**  
public vs private

In %



Note: on the basis of seven generalist and entertainment channels and seven children's channels

ROVI INTERNATIONAL SOLUTIONS

Population 2014*	46.5 million
GDP per capita 2014*	30 113 USD

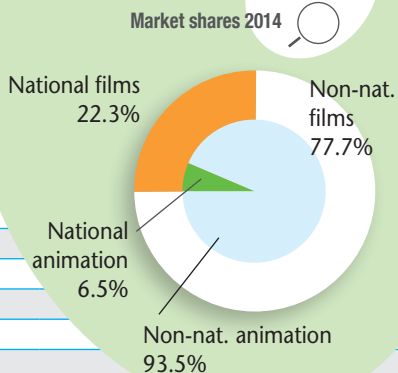
## Film landscape 2014

Gross box office all films	522.5 M EUR (694.93 bn USD)
Admissions all films	87.4 million
Gross box office animation	72.16 M EUR (95.97 bn USD)
Admissions animation	12.07 million
Average admissions animation 2010-2014	15.23 million
Screens (digital screen penetration)	2 803 (76%)

## TV landscape 2014

Television households (2013)	16.3 million
Digital TV households (2013)	99%

		Free to air	Public	Private
National children's channels	13	4	2	11
Children's channels targeting other countries	1			
Foreign children's channels available	7			
National film channels	14	2	0	14
Film channels targeting other countries	2			
Foreign film channels available	3			



Spain was the fifth largest market by admissions in the European Union in 2014 (87.4m), with an increase (+14%) for the first time after 10 years of decrease. Total gross earnings were €522.5m. For animation feature films, the 12,07m admissions represent 13.81% of total market share in 2014, which implies a decrease (-21%) from the 15.23% average market share for the period 2010-2014. Animated feature production has dropped with only 5 films produced in 2012 (and in 2013), as compared to the peak of 9 films in 2011. On average, in the period 2010-2014 Spain produced 28 animation features for theatrical release, a yearly average of 5.6 films. In 2014, only 2 feature films qualify as produced and released theatrically, but two productions (*Meñique*, *Pos Eso*) have been released in the first half of 2015 and two more (*Wiracocha* and *El Joven Cervantes*) are awaiting release. Animation represented 4% of total production volume in the country in 2014.

In 2012, the film *Tad, the lost Explorer* became the top grossing Spanish animation feature film of all time, with 2.75m admissions (96.77% of domestic admissions to all Spanish animation films in 2012) and reached number 2 in the top 10 animation feature films released in Spain for the period, just behind *Toy Story 3* but surpassing *Frozen*. From the European top 5 markets only Spain has performed this well at home compared to US pro-

ductions. In 2009, *Planet 51* reached the top 10 in 3rd position. The market share of US animation films in Spain still represents almost 90% of all admissions in the period 2010-2014 (with an exceptional decrease to 80% in 2012).

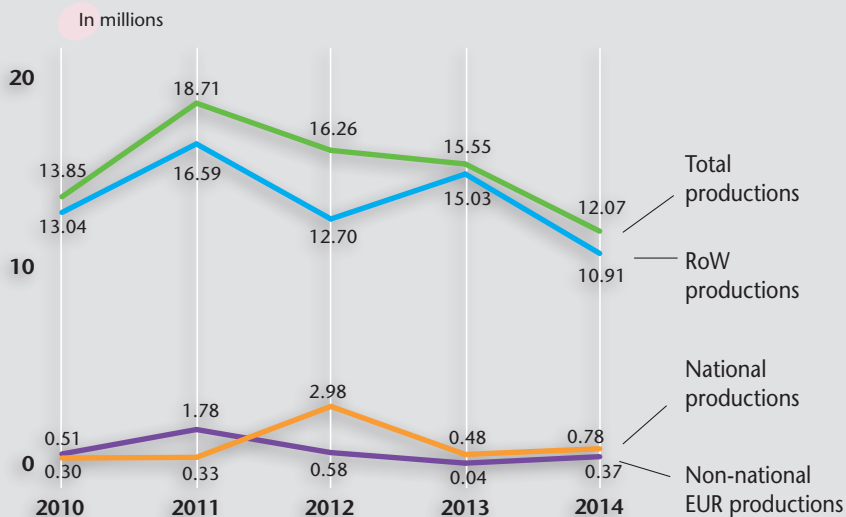
For the analysis of the proportions of animation on television in Spain, using data from ROVI, just 6 generalist and entertainment channels are available (TVE, La2, Tele5, Canal+, Cuatro, La Sexta), and three children's channels (Neox, Clan TVE, Disney Channel). The Catalan public children's channel (Super 3) is not included in the ROVI sample. Page 37 shows the trends over time in animation broadcast on the main channels, followed by the proportions of European animation on all the channels in 2013. There was a major reduction on the amount of animation broadcast on all the main channels between 2009 and 2011. This could be a consequence of the financial crisis in Spain or a result of children's programming migrating to niche children's channels. At the same time, the proportion of non-European animation has increased dramatically on these channels. The situation improves when children's channels are included, although non-European content still exceeds 60%. Content from other European countries such as the UK, France and Italy make up a considerable part of the European animation on Spanish TV.

ICAA/OBS LUMIERE/OBS MAVISE/HIS

ICAA/OBS LUMIERE/OBS MAVISE/ROVI



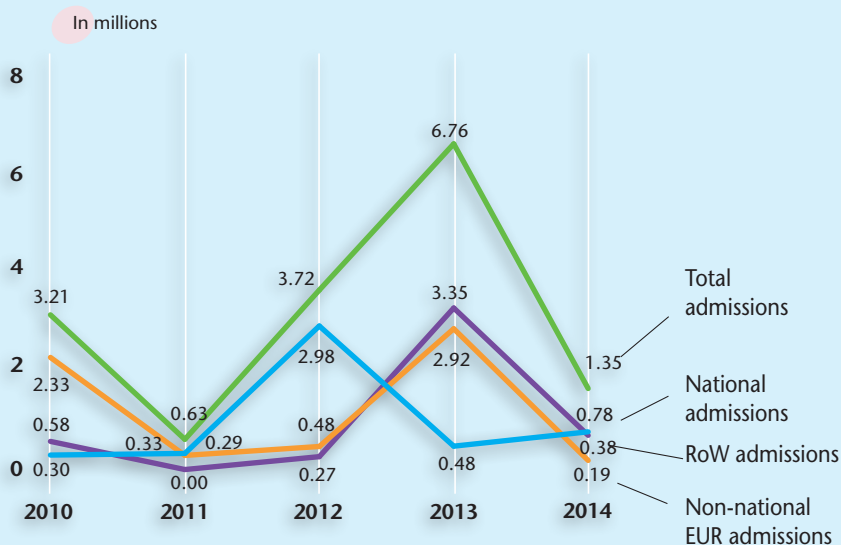
### Admissions to animation films in Spain by country of production • 2010-2014<sup>①</sup>



① It only includes new productions (films produced up to two years before the release year).

OBS LUMIERE, ICAA

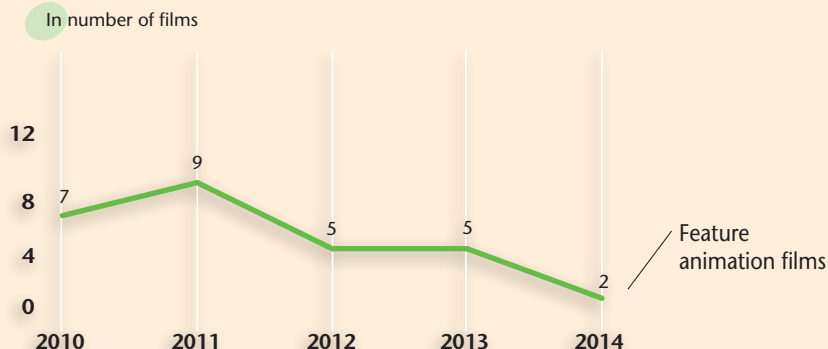
### Admissions to Spanish animation films by release market • 2010-2014<sup>①</sup>



① It only includes new productions (films produced up to two years before the release year).

OBS LUMIERE, ICAA

## Production volume • 2010-2014



OBS LUMIERE, ICAA

## Top 10 animation films by admissions in Spain • 2010-2014

Rank	Title	Country of origin	Director	Distributor	Admissions	Year of production
1	Toy Story 3	US	Lee Unkrich	The Walt Disney ...	3 609 222	2010
2	Las aventuras de Tadeo Jones	ES	Enrique Gato	Paramount Spain	2 745 134	2012
3	Frozen	US	Chris Buck, Jennifer Lee	The Walt Disney ...	2 712 226	2013
4	The Adventures of Tintin	US/NZ	Steven Spielberg	Sony Pictures ...	2 478 457	2011
5	Puss in Boots	US	Chris Miller	Paramount Spain	2 460 266	2011
6	Ice Age: Continental Drift	US	S. Martino, M. Thurmeier	Hispano Foxfilms	2 426 221	2012
7	Brave	US	St. Purcell, M. Andrew, ...	The Walt Disney ...	2 381 328	2012
8	Shrek Forever After	US	Mike Mitchell	Paramount Spain	2 321 716	2010
9	Despicable Me 2	US	P. Coffin, C. Renaud	Universal Pictures ...	2 190 423	2013
10	The Smurfs	US	Raja Gosnell	Sony Pictures ...	2 147 288	2011

OBS LUMIERE

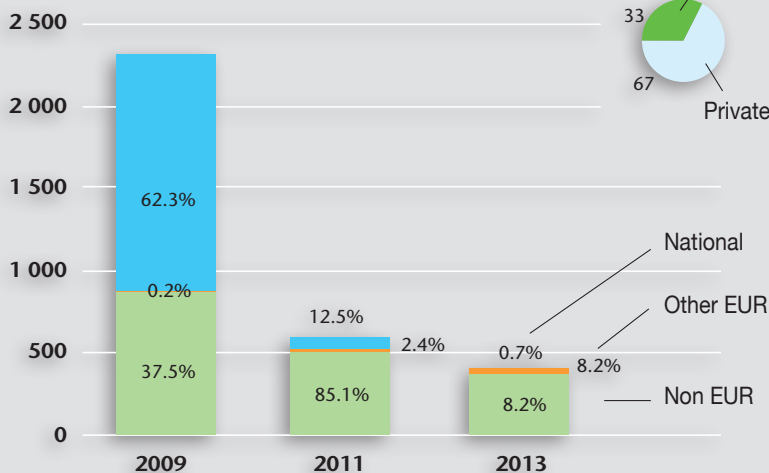
## Top 10 Spanish animation films by admissions in Spain • 2010-2014

Rank	Title	Country of origin	Director	Distributor	Admissions	Year of production
1	Las aventuras de Tadeo Jones	ES	Enrique Gato	Paramount Spain	2 745 134	2012
2	Mortadelo y Filemón ...	ES	Javier Fesser	Warner Bros. ...	694 256	2014
3	Justin and the Knights of Valour	ES	Manuel Sicilia	Sony Pictures ...	407 315	2013
4	Floquet de Neu	ES	Andrés G. Schaer	Barton Films	249 985	2011
5	Planet 51	ES/GB	Javier Abad, Jorge Blanco	DeAPlaneta	221 580	2009
6	Chico & Rita	ES/GB	J. Mariscal, F. Trueba	The Walt Disney ...	156 532	2010
7	El tesoro del rey midas	ES	Maite Ruiz de Austri	Extra Extremadura ...	69 514	2010
8	El extraordinario viaje ...	ES	Maite Ruiz de Austri	Barton Films	47 126	2013
9	La tropa de trapo en el pais ...	ES	Alex Colls	Alta Classics	41 756	2010
10	Olentzero eta Iratxoen Jauntxoa	ES	Gorka Vázquez	Barton Films	30 409	2011

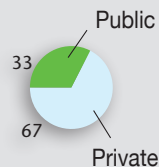
OBS LUMIERE

### Spain: National, European and non-European animation on main TV channels (reaching 70% of audience)

In hours



### European animation on TV 2013: public vs private

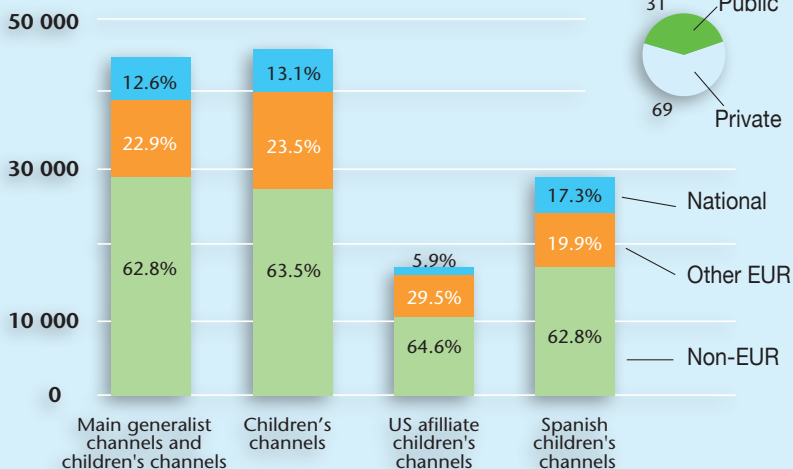


Note: on the basis of TVE, La2, Tele5, Canal+, Cuatro, La Sexta

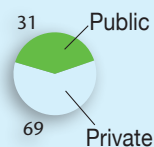
ROVI INTERNATIONAL SOLUTIONS

### Spain: National, European and non-European animation on main TV channels and children's channels 2013

In hours



### European animation on all TV 2013: public vs private



Note: on the basis of six generalist and entertainment channels and three children's channels

ROVI INTERNATIONAL SOLUTIONS

# United Kingdom

Population 2014*	63.4 million
GDP per capita 2014*	44 141 USD

## Film landscape 2014

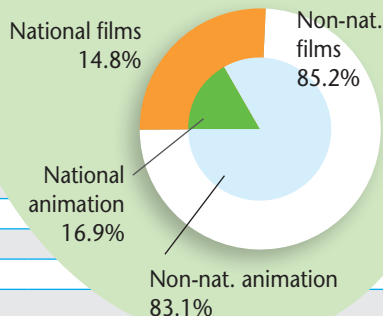
Gross box office all films	1 125.1 M EUR (1 846.3 bn USD)
Admissions all films	167.5 million
Gross box office animation	186.61 M EUR (306.2 bn USD)
Admissions animation	27.78 million
Average admissions animation 2010-2014	30.50 million
Screens (digital screen penetration)	3 909 (99%)

## TV landscape 2014

Television households (2013)	28.1 million
Digital TV households (2013)	95%

		Free to air	Public	Private
National children's channels	22	5	3	19
Children's channels targeting other countries	120		1	119
Foreign children's channels available	1			
National film channels	37	4	1	36
Film channels targeting other countries	54		0	54
Foreign film channels available	2			

Market shares 2014



UK & Ireland<sup>①</sup> is the largest market for animation in the EU with average 30.5 million admissions between 2010 and 2014 — 27.8 million admissions in 2014, representing 16.6% of the total theatrical attendance. The concentration of admissions to animation films at the top was slightly higher than in overall terms (the 10 highest grossing animation films achieved 35% of the admissions to animation in the territory). However, when it comes to local animation, the figures exploded, with the top four titles (three of them GB inc productions) accounting for 46% of the admissions to British animation in the UK & Ireland. These same three inward investment productions, *Arthur Christmas*, *The Pirates! Band of Misfits* and *Gnomeo and Juliet*, were among the four European animation films with the widest circulation abroad and alone represented 36.4% of all admissions to European animation abroad (in non-national Europe and the non-European territories tracked in this analysis). Furthermore, the market share for domestic animation (16.8% in 2014) was slightly above the market share for all British productions.

As in the rest of Europe, American films gained most of the admissions to animation in the UK & Ireland, whereas non-national European productions, despite a modest growth over the last two years, only represented a meagre 2.8% of the total admissions to animation. When it comes to production, the UK produced 26 animation films over the last five years.

The United Kingdom is a major home of children's channels that are broadcast throughout Europe (see page 57). Important national children's channels include CBBC, CBeebies (BBC), CITV and the US affiliate channels<sup>②</sup>: Disney, Nickelodeon, Boomerang, Cartoon Network and Baby TV.

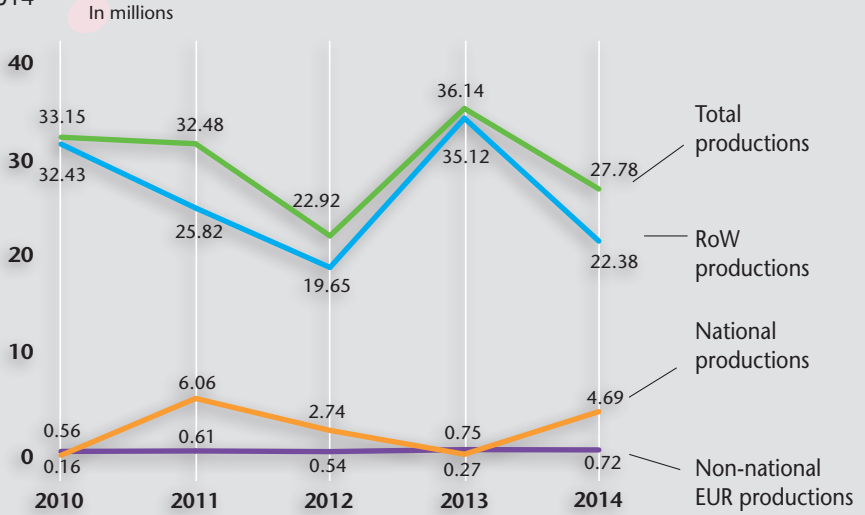
For the analysis (page 41) of the proportions of animation on children's TV in the UK, data from ROVI is used. The ROVI sample is based on 19 generalist and entertainment channels and nine children's channels. The children's channels Pop! and Tiny Pop! are not included. The graphs on page 41 deal with the trends over time in animation broadcast on the main channels, followed by the proportions of European animation on all the channels in 2013. For the main generalist and entertainment channels, the level of non-European animation (up to 60% in 2013) is much higher than on children's channels. Two channels with a significant level of US animation are Comedy Central and Sky 1. For the UK children's channels (CBBC, CITV and CBeebies) the proportion of national animation is over 83% of the total. Baby TV is categorised as a US affiliate owned by Fox International which, according to the data, sources almost 100% of its animation in the UK.

BFI/OBS LUMIERE/OBS MAVISE/  
ROVI INTERNATIONAL SOLUTIONS

① Data on admissions to individual films aggregate admissions from the UK and the Republic of Ireland

② A US affiliate channel is defined as a channel whose parent company is a US Media Group.

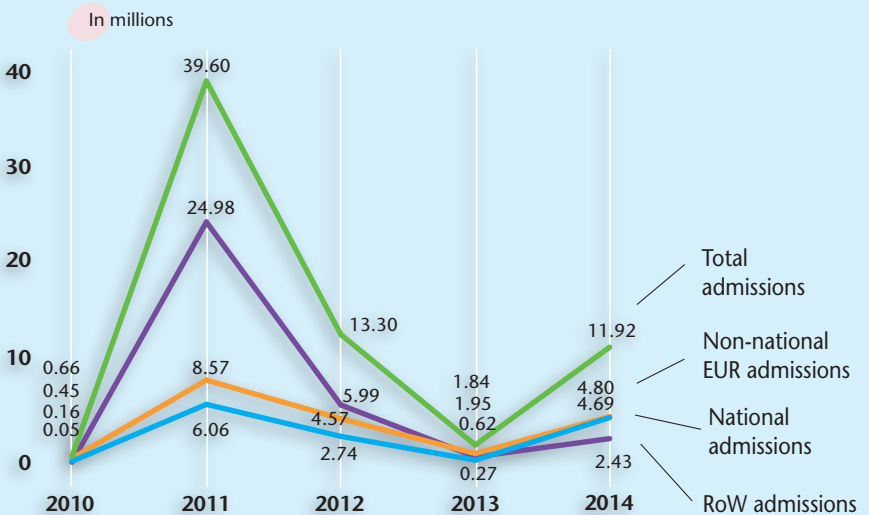
**Admissions to animation films in United Kingdom by country of production • 2010-2014<sup>①</sup>**



① It only includes new productions (films produced up to two years before the release year).

BFI, OBS LUMIERE

**Admissions to UK animation films by release market • 2010-2014<sup>①</sup>**

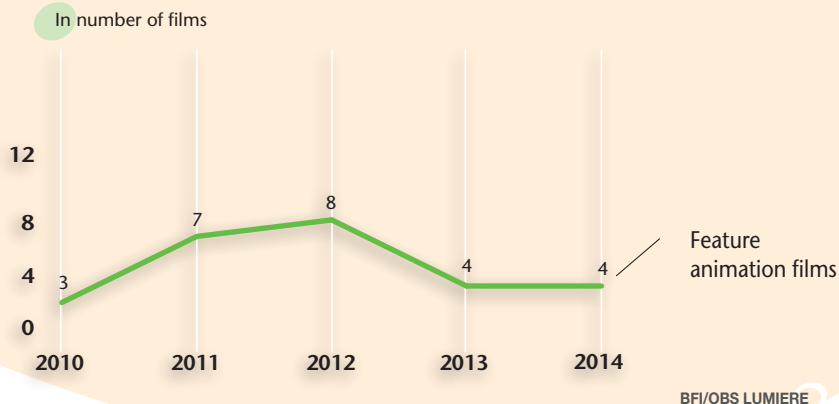


① It only includes new productions (films produced up to two years before the release year).

\* In 2011, from total admissions of 39 602 984, two GB inc/US productions had 38 965 966 admissions (98%)

BFI, OBS LUMIERE

## Production volume • 2010-2014



## Top 10 animation films by admissions in the United Kingdom • 2010-2014

Rank	Title	Country of origin	Director	Distributor	Admissions	Year of production
1	Toy Story 3	US	Lee Unkrich	Walt Disney (GB)	12 635 504	2010
2	Despicable Me 2	US	P. Coffin, C. Renaud	Universal Pictures (GB)	7 265 745	2013
3	Frozen	US	Chris Buck, Jennifer Lee	Walt Disney (GB)	6 956 653	2013
4	Shrek Forever After	US	Mike Mitchell	Paramount (GB)	5 545 096	2010
5	The Lego Movie	US/AU/DK	P. Lord, C. Miller	Warner Bros. (GB)	5 049 754	2014
6	Ice Age: Continental Drift	US	S. Martino, M. Thurmeier	20th Century Fox (GB)	4 781 086	2012
7	Monsters University	US	Dan Scanlon	Walt Disney (GB)	4 703 462	2013
8	The Croods	US	C. Sanders, K. De Micco	20th Century Fox (GB)	4 098 939	2013
9	Paddington ①	GB/FR	Paul King	StudioCanal (GB)	4 012 645	2014
10	How to Train Your Dragon 2	US	Dean DeBlois	20th Century Fox (GB)	3 688 797	2014

① Films still grossing in 2015

OBS LUMIERE

## Top 10 UK animation films by admissions in the United Kingdom • 2010-2014 ①

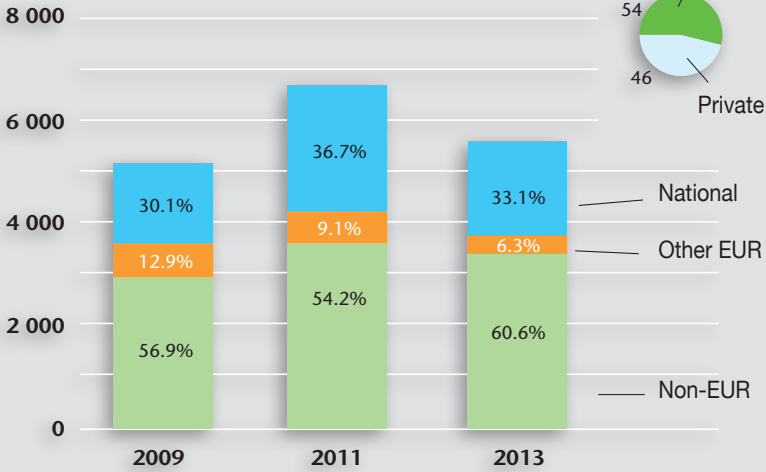
Rank	Title	Country of origin	Director	Distributor	Admissions	Year of production
1	Paddington ①	GB/FR	Paul King	StudioCanal (GB)	4 012 645	2014
2	Arthur Christmas	GB inc/US	Sarah Smith, Barry Cook	Sony Pictures (GB)	3 545 938	2011
3	The Pirates! Band of Misfits	GB inc/US	Jeff Newitt, Peter Lord	Sony Pictures Intl	2 628 490	2012
4	Gnomeo and Juliet	GB inc/US	Kelly Asbury	eOne Films	2 611 285	2011
5	Postman Pat: The Movie	GB	Mike Disa	Lionsgate (GB)	513 979	2014
6	Moshi Monsters: The Movie	GB	W. Vernooij, M. Francis	Universal Pictures (GB)	348 485	2013
7	L'illusioniste	GB/FR	Sylvain Chomet	Pathé Distribution (GB)	156 758	2009
8	Thomas & Friends: King Of ...	GB	Rob Silvestri	Hit Entertainment	21 376	2013
9	Thomas & Friends: Tale Of ...	GB	Rob Silvestri	Hit Entertainment	18 826	2014
10	Thomas & Friends: Blue ...	GB	Greg Tiernan	Hit Entertainment	17 943	2012

① Films still grossing in 2015

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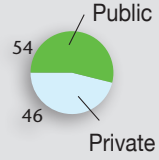
**United Kingdom: National, European and non-European animation on main TV channels (reaching 70% of audience)**

In hours



**European animation on main TV channels 2013: public vs private**

In %

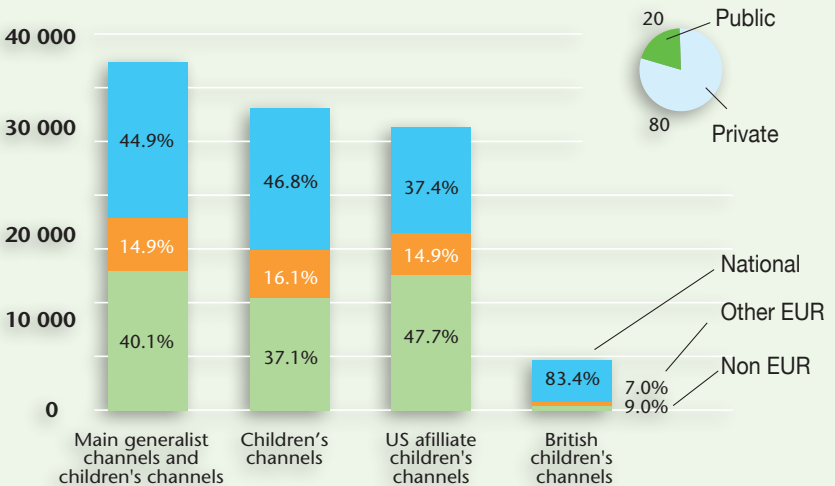


Note: on the basis of 19 generalist and entertainment channels

ROVI INTERNATIONAL SOLUTIONS

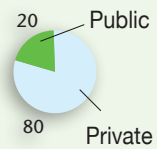
**United Kingdom: National, European and non-European animation on main TV channels and children's channels • 2013**

In hours



**European animation on all TV 2013: public vs private**

In %



Note: on the basis of 19 generalist and entertainment channels and nine children's channels.

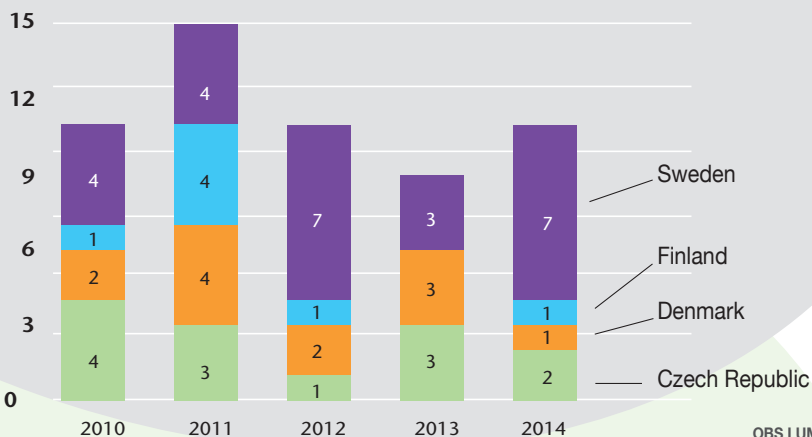
ROVI INTERNATIONAL SOLUTIONS



## Other European countries

### Feature animation films produced with a theatrical release • 2010-2014

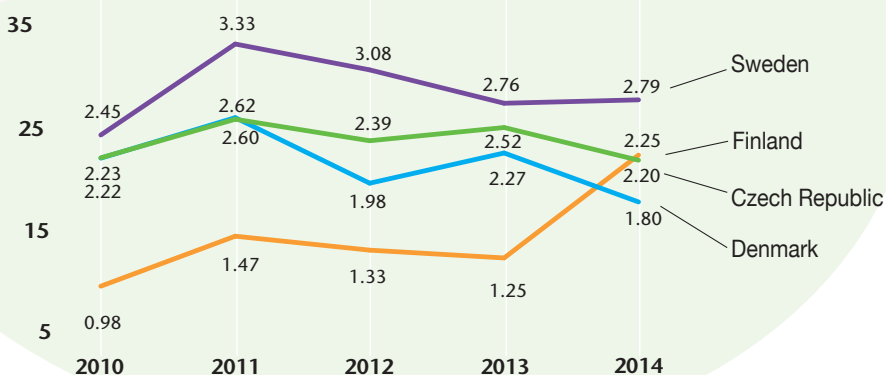
In number of films



OBS LUMIERE

### Admissions to animation films by country • 2010-2014<sup>①</sup>

In million admissions



① It only includes new productions (films produced up to two years before the release year).

OBS LUMIERE

### Top 10 Czech animation films by admissions in the world • 2010-2014

Rank	Title	Country of origin	Director	Territories	Admissions	Year of production
1	Kuky se vrací 2D	CZ	Jan Sverák	4	366 643	2010
2	Ctyrlístek ve službách krále	CZ	Michal Zabka	2	285 196	2013
3	Saxána a Lexikon kouzel 2D	CZ	Václav Vorlíček	3	248 072	2010
4	Alois Nebel 2D	CZ/DE	Tomáš Lunák	9	160 692	2011
5	Koží příběh se syrem	CZ	Jan Tománek	2	156 307	2012
6	Fimfárum, do třetice všeho dobrého	CZ	D. Sůkup, K. Dufková, V. Pospíšilová	3	140 112	2010
7	Na půdě aneb Kdo má dneska ...	CZ/SK/JP	Jirí Barta	9	68 667	2009
8	Pát et Mat	CZ	Marek Benes	2	59 172	2014
9	Kovář z Podlesí	CZ	Pavel Göbl	2	55 773	2013
10	Autopohádky 2D	CZ	divers	2	32 365	2011

OBS LUMIERE

## Top 10 Danish animation films by admissions in the world • 2010-2014

Rank	Title	Country of origin	Director	Territories	Admissions	Year of production
1	Disco ormene	DK/DE	Thomas Borch Nielsen	20	739 034	2008
2	Marco Macaco	DK	Jan Rahbek	6	629 915	2012
3	Olsen Banden - pa de bonede ...	DK	Jørgen Lerdam	1	349 070	2009
4	Orla Frøsnapper	DK	Peter Dodd	12	328 307	2011
5	Den kæmpestore bjørn	DK	Esben Toft Jacobsen	7	322 501	2011
6	Ronal Barbaren	DK	K. V. Andersen, T. Christoffersen	12	233 948	2011
7	Gummi T	DK	Michael Hegner	6	218 951	2012
8	Otto er et næsehorn	DK	Kenneth Kainz	6	217 211	2013
9	Olsen Banden på dybt vand	DK	Jørgen Lerdam	3	202 946	2013
10	En Promenade...	DK/SE/LV /...	R. Groothuizen, S. Melchior, ...	1	46 765	2010

OBS LUMIERE

## Top 9 Finnish animation films by admissions in the world • 2010-2014

Rank	Title	Country of origin	Director	Territories	Admissions	Year of production
1	Niko 2: Lentäjäveljekset	FI/DE/DK/IE	Kari Juusonen, Jørgen Lerdam	23	2 776 442	2012
2	Niko - lentäjän poika	FI/DE/DK/IE	Michael Hegner, Kari Juusonen	23	357 483	2008
3	Muumit Rivieralla	FI/FR	Xavier Picard, Hanna Hemilä	2	292 925	2014
4	Muumi ja punainen pyrstötähti	FI	Maria Lindberg	12	92 879	2010
5	Maaginen kristalli	FI/BE	Antti Haikala	2	84 887	2011
6	Muumi ja vaarallinen juhannus	FI/AT/PL	Maria Lindberg	8	19 314	2008
7	Eetu ja Konna	FI	Kari Häkkinen	1	16 527	2011
8	Ella & Alekski - Yllätys synttärit	FI	Juuso Syrjä	1	9 878	2011
9	Täältä tulee Myyrä	FI/CZ	Zdenek Miler	1	4 462	2011

OBS LUMIERE

Top 10 Swedish animation films by admissions in the world • 2010-2014 <sup>①</sup>

Rank	Title	Country of origin	Director	Territories	Admissions	Year of production
1	Bamse och tjuvstaden	SE	Christian Ryltenius	4	408 001	2014
2	Pettson & Findus - Glömligheter	SE	Anders Sørensen, Jørgen Lerdam	10	245 864	2009
3	Emil & Ida i Lönneberga	SE	Lasse Persson, Alicja Björk, Per Åhlin	6	215 214	2013
4	Resan till Fjäderkungens Rike	SE/DK	Esben Toft Jacobsen	10	186 556	2014
5	Lilla spöket Laban - Bullar och ...	SE/FI	A. Jaworski, K. Nilsson, P. Åhlin, ...	4	126 103	2009
6	Lilla Anna och Långa farbror	SE	Alicja Björk, Alicja Jaworski	2	80 990	2012
7	Prick och Fläck	SE	Uzi Geffenblad, Lotta Geffenblad	5	46 575	2011
8	Vem blöder?	SE	Jessica Laurén	1	43 698	2010
9	Liten Skär och alla små Brokiga	SE	Stina Wirsen	1	23 514	2012
10	Vem?	SE	Jessica Laurén	2	23 105	2010

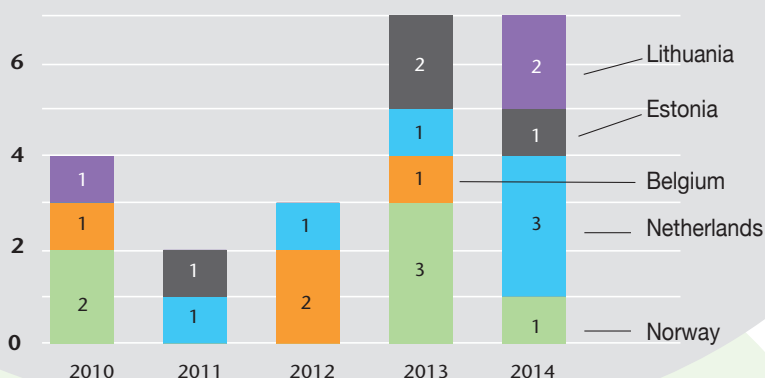
① It only includes new productions (films produced up to two years before the release year).

OBS LUMIERE

## Other European countries

### Feature animation films produced with a theatrical release • 2010-2014

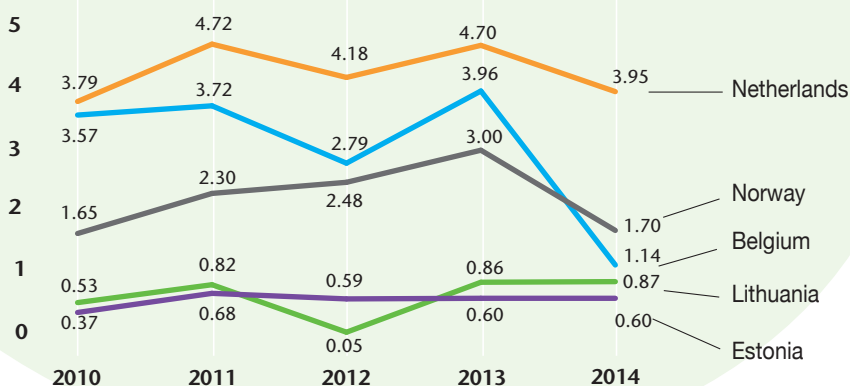
In number of films



OBS LUMIERE

### Admissions to animation films by country • 2010-2014<sup>①</sup>

In millions



① It only includes new productions (films produced up to two years before the release year).

OBS LUMIERE

### Top 8 Norwegian animation films by admissions in the world • 2010-2014

Rank	Title	Country of origin	Director	Territories	Admissions	Year of production
1	Solan og Ludvig - Jul i Flåkløya	NO	Rasmus A. Sivertsen	10	1 125 525	2013
2	Pelle Politibil på sporet	NO	Rasmus A. Sivertsen	9	257 053	2013
3	Hokus pokus Albert Åberg	NO	Torill Kove	5	255 805	2013
4	Pelle Politibil går i vannet	NO	Rasmus A. Sivertsen	6	236 355	2009
5	Elias og jakten på havets gull	NO	Lise I. Osvoll	4	150 754	2010
6	Knoester & Berkelientje	NO	Martin Lund	1	10 901	2010
7	Kurt blir grusom	NO/DK	Rasmus A. Sivertsen	3	5 572	2008
8	Freak Out	NO/DE/DK /...	Carl Javér	1	2 596	2014

OBS LUMIERE

## Top 7 Belgian animation films by admissions in the world • 2010-2014

Rank	Title	Country of origin	Director	Territories	Admissions	Year of production
1	Sammy's avonturen: De geheime...	BE/US	Ben Stassen	36	8 394 503	2010
2	Sammy's avonturen 2	BE/FR/IT	Vincent Kesteloot, Ben Stassen	33	6 362 328	2012
3	The House of Magic	BE	Jeremy Degruson, Ben Stassen	33	6 157 914	2013
4	Couleur de peau : Miel	BE/FR/KR /...	Henin Jung, Laurent Boileau	9	76 309	2012
5	Panique au village	BE/LU/FR	Stéphane Aubier, Vincent Patar	22	69 163	2009
6	Le mulot menteur	BE/FR/HU /...	Andrea Kiss	1	42 700	2008
7	Fly Me to the Moon	BE/US	Ben Stassen	26	36 691	2008

OBS LUMIERE

## Top 7 Dutch animation films by admissions in the world • 2010-2014

Rank	Title	Country of origin	Director	Territories	Admissions	Year of production
1	Sprookjesboom de Film	NL	Hans Waither	2	213 915	2012
2	Nijntje de film	NL	Hans Perk	1	176 647	2013
3	Pim & Pom: Het Grote Avontuur	NL	Gioia Smid	1	65 034	2014
4	Trippel Trappel Dierensinterklaas	NL/BE	Albert 't Hooft, Paco Vink	1	58 451	2014
5	Suske en Wiske: De Texas rakkers	NL/BE	Wim Bien, Mark Mertens	3	2 522	2009
6	The Monster of Nix	NL	Rosto	1	1 747	2011
7	Last Hijack	NL/DE/IE/BE	Tommy Pallotta, Femke Wolting	2	558	2014

OBS LUMIERE

## Top 4 Estonian animation films by admissions in the world • 2010-2014

Rank	Title	Country of origin	Director	Territories	Admissions	Year of production
1	Lotte ja kuukivi saladus	EE/LV	Heiki Ernits, Janno Põldma	14	200 948	2011
2	Lisa Limone and Maroc Orange,...	EE	Mait Laas	1	3 981	2013
3	Suur maaliöö	EE	Aina Järviine, Meelis Arulepp	1	3 053	2013
4	Muhu ätsed ja roosid/Tantsitaja	EE	Kadriann Kibus	1	79	2014

OBS LUMIERE

## Top 4 Lithuanian animation films by admissions in the world • 2010-2014

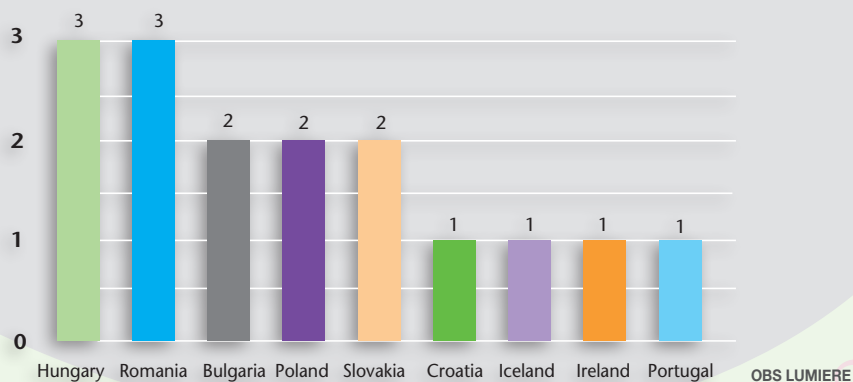
Rank	Title	Country of origin	Director	Territories	Admissions	Year of production
1	Le tigre et les animaux de la forêt	LT	Janis Cimermanis, Dace Riduze	2	62 760	2010
2	Gustavo nuotykių	LT	A. Gričius, V. Lekavičius	1	59 380	2014
3	The Golden Horse	LT/LV/LU/DK	Valentas Ashkins, Reinis Kalnaellis	2	19 552	2014
4	Le bal des lucioles et autres courts	LT	E. Laciš, M. Brinkmanis, D. Riduze	2	7 267	2008

OBS LUMIERE

# Other European countries

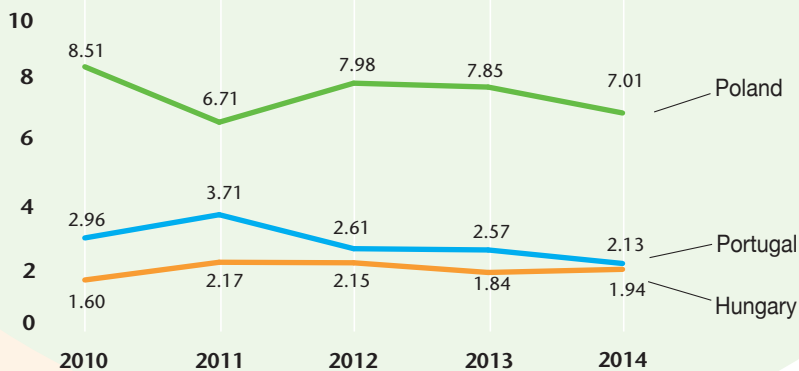
## Aggregate number of feature animation films • 2010-2014

In number of films produced



## Admissions to animation films by country • 2010-2014 <sup>①</sup>

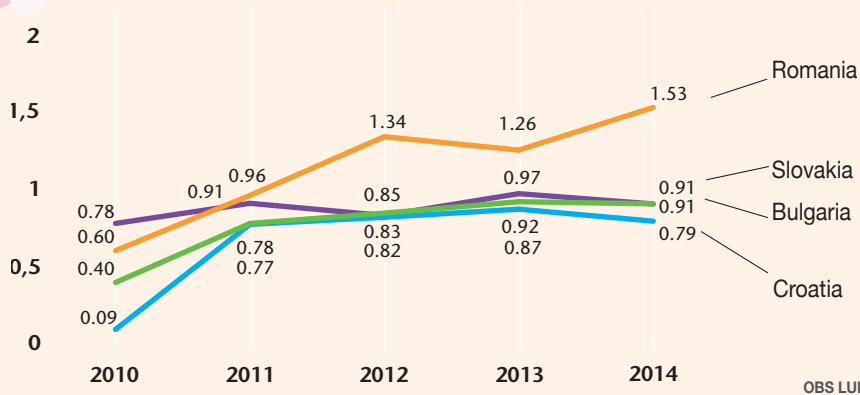
In millions



<sup>①</sup> It only includes new productions (films produced up to two years before the release year).

## Admissions to animation films by country • 2010-2014 <sup>①</sup>

In millions



<sup>①</sup> It only includes new productions (films produced up to two years before the release year).

Other European <sup>①</sup> animation films by admissions in the world • 2010-2014

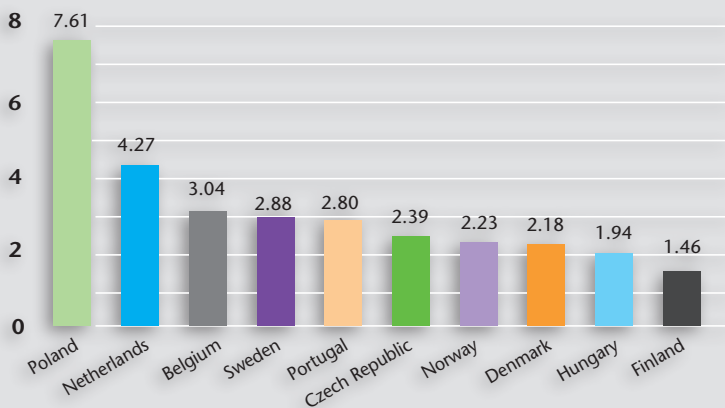
Rank	Title	Country of origin	Director	Territories	Admissions	Year of production
1	Hetjur Valhallar - Þór	IS/DE/IE	Óskar Jónasson	15	1 137 650	2011
2	Song of the Sea	IE/DK/BE/...	Tomm Moore	4	159 434	2014
3	Fimfárum - Do třetice všeho...	SK/US	V. Pospisilová, K. Dufková, D. Sůkup	3	140 112	2011
4	Jez Jerzy	PL	Jakub Tarkowski, Tomasz Lesniak	1	118 729	2011
5	Bogyó És Babóca 3. - Játszótársak	HU	Géza M. Tóth, Antonin Krizsanics	1	38 603	2014
6	Balgar: The Movie	BG	Nedelcho Bogdanov	1	32 003	2014
7	Gwiazda Kopernika	PL	Z. Kudla, A. Orzechowski	1	19 081	2009
8	Crulic - drumul spre dincolo	RO/PL	Anca Damian	8	7 414	2011
9	The Stressful Adventures of ...	RO/US	Elliot Cowan	1	3 929	2014
10	Inspektor Martin i banda puzeva	HR	Igor Lepcin	1	3 420	2012
11	Papel de Natal	PT	José Miguel Ribeiro	1	964	2014
12	Minopolska	PL	W. Giersz, T. Badzian, E. Sturlis, ...	1	939	2014
13	Cycle	HU	Zoltan Sostai	2	660	2012
14	Um Gato Sem Nome	PT	Carlos Cruz	1	602	2009
15	Cernozaurii	RO	Radu Dinulescu	1	342	2013
16	5 metra korridor	BG/RU	Dimitri Yagodin	2	36	2010
17	Bogyó és Babóca - 13 ÚJ mese	HU	Antonin Krizsanics	1	22	2011

① Countries with less than 3 films produced, as sole producers or majoritary co-producers, and released in the period 2010-2014.

OBS LUMIERE

Top 10 other European countries by average admissions • 2010-2014

In millions



OBS LUMIERE

# Minority co-production countries

## Minority co-production countries • 2010-2014

### BELGIUM

Rank	Title	Country of origin	Director	Worldwide admissions	Year of production	Production volume
1	Minuscule - La vallée des...	FR/BE	T. Szabo, H. Giraud	2 819 535	2013	<p>Majority co-production 100% national 4% 11% 85% Minority co-production</p>
2	Zarafa	FR/BE	J-C. Lie, R. Bezançon	1 737 029	2012	
3	Ernest & Celestine	FR/BE/LU	S. Aubier, V. Patar	716 556	2012	
4	Une vie de chat	FR/NL/CH...	J-L. Felicioli, A. Gagnol	644 405	2010	
5	Jack et la mécanique...	FR/BE	S. Berla, M. Malzieu, ...	584 369	2013	
6	Pinocchio	IT/LU/BE/FR	Enzo D'Alò	490 156	2012	
7	Le jour des corneilles	FR/LU/CA ...	Jean Christophe Dessaint	428 325	2011	
8	Le magasin des suicides	FR/CA/BE	Patrice Leconte	381 634	2012	
9	Yellowbird	FR/BE	Christian De Vita	335 204	2014	
10	Le tableau	FR/BE	Jean-François Laguionie	207 047	2011	
11	Song of the Sea	IE/DK/BE/...	Tomm Moore	159 434	2014	
12	The Prodigies	FR/BE/LU	Antoine Charreyron	147 870	2010	
13	The Congress	IL/BE/DE ....	Ari Folman	146 423	2013	
14	Le parfum de la carotte	FR/BE/CH	R. Durin, A. Demuyneck	108 122	2014	
15	Loulou, l'incroyable secret	FR/BE/HU	Eric Omond	91 276	2013	
16	Maaginen kristalli	FI/BE	Antti Haikala	84 887	2011	
17	Allez raconte!	FR/BE	Jean-Christophe Roger	62 515	2010	
18	The magic piano	FR/PL/BE...	M. Clapp, G.Jacquel, ...	62 282	2011	
19	Trippel Trappel ...	NL/BE	Albert 't Hooft, Paco Vink	58 451	2014	
20	L'histoire du petit Paolo	FR/BE	C. Marreiros-Marum, ...	40 378	2011	
21	Monstres... pas si ...	FR/BE	J. Bueno, C. Li, ...	37 856	2012	
22	Last Hijack	NL/DE/IE ...	T. Pallotta, F. Wolting	558	2014	

OBS LUMIERE/RENTRAK

### LUXEMBOURG

Rank	Title	Country of origin	Director	Worldwide admissions	Year of production	Production volume
1	Ernest & Celestine	FR/BE/LU	S. Aubier, V. Patar	716 556	2012	<p>Minority co-production 100%</p>
2	Pinocchio	IT/LU/BE ...	Enzo D'Alò	490 156	2012	
3	Le jour des corneilles	FR/LU/CA ...	J- C. Dessaint	428 325	2011	
4	Song of the Sea	IE/DK/BE ...	Tomm Moore	159 434	2014	
5	The Prodigies	FR/BE/LU	Antoine Charreyron	147 870	2010	
6	The Congress	IL/BE/DE /...	Ari Folman	146 423	2013	
7	Tante Hilda	FR/LU	J-R. Girerd, B. Chieux	105 489	2013	
8	Ma maman est en Amérique, ...	FR/LU	T. Chatel, M. Boreal	74 502	2012	
9	Les fantastiques livres ...	FR/AR/US ...	W. Joyce, B. Oldenburg	48 392	2011	
10	Rose et Violette	CA/LU	A. Ruhemann, S. Tan ...	21 487	2011	
11	The Golden Horse	LT/LV/LU ...	V. Ashkins, R. Kalnaellis	19 552	2014	

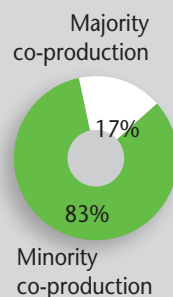
OBS LUMIERE/RENTRAK



# Minority co-production countries

## IRELAND

Rank	Title	Country of origin	Director	Worldwide admissions	Year of production	Production volume
1	Niko 2: Lentäjäväljekset	FI/DE/DK/IE	K. Juusonen, J. Lerdam	2 776 383	2012	<p>Majority co-production: 17%</p> <p>Minority co-production: 83%</p>
2	Hetjur Valhallar - Þór	IS/DE/IE	Óskar Jónasson	1 137 650	2011	
3	Der Mondmann	FR/DE/IE	S. Schesch, S. C. Weber	224 193	2012	
4	The Snowman and the Snowdog	GB/IE	Hilary Audus	130 216	2012	
5	Last Hijack	NL/DE/IE/BE	T. Pallotta, F. Wolting	558	2014	



OBS LUMIERE/RENTAK

## LATVIA

Rank	Title	Country of origin	Director	Worldwide admissions	Year of production	Production volume
1	Lotte ja kuukivi saladus	EE/LV	H. Ernits, J. Pöldma	200 948	2011	<p>100% national: 33%</p> <p>Minority co-production: 67%</p>
2	En Promenade...	DK/SE/LV ...	R. Groothuizen, Siri ...	46 765	2010	
3	The Golden Horse	LT/LV/LU ...	V. Ashkins, R. Kalnaellis	19 552	2014	
4	Rocks in My Pockets	US/LV	Signe Baumane	8 008	2014	

Minority co-production

OBS LUMIERE/RENTAK

## POLAND

Rank	Title	Country of origin	Director	Worldwide admissions	Year of production	Production volume
1	The magic piano	FR/PL/BE/NO	M. Clapp, G. Jacquel,...	62 282	2011	<p>100% national: 43%</p> <p>Minority co-production: 57%</p>
2	The Flying Machine	GB/PL/CN ...	M. Clapp, D. Kobiela	45 561	2011	
3	Gottland	CZ/PL	V. Cákanyová, R. Sibr,...	7 898	2014	
4	Crulic - drumul spre dincolo	RO/PL	Anca Damian	7 414	2011	

Minority co-production

OBS LUMIERE/RENTAK

## SWITZERLAND

Rank	Title	Country of origin	Director	Worldwide admissions	Year of production	Production volume
1	Une vie de chat	FR/NL/CH...	J.-L. Felicioli, A. Gagnol	644 405	2010	<p>100% minority co-production</p>
2	Le parfum de la carotte	FR/BE/CH	R. Durin, A. Demuyneck	108 122	2014	
3	Couleur de peau : Miel	BE/FR/KR...	H. Jung, L. Boileau	76 309	2012	
4	Lost and Found	GB/CH/FR	P. Nanuk, P. Hunt, J. Lurie	32 068	2010	

Minority co-production

OBS LUMIERE/RENTAK

Population 2014*	76.7 million
GDP per capita 2014*	10 518 USD

## Film landscape 2014

Gross box office all films	655.4 M EUR (300 M USD)
Admissions all films	61.35 million
Gross box office animation	54.36 M EUR (24.88 M USD)
Admissions animation <sup>①</sup>	5.09 million
Average admissions animation 2010-2014	4.65 million
Screens (digital screen penetration)	986 (68%)

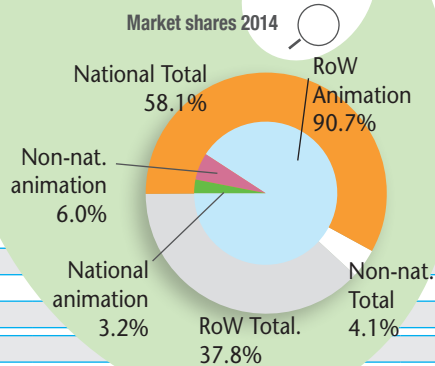
## TV landscape 2014

Television households (2013)	19.6 million
Digital TV households (2013)	57%

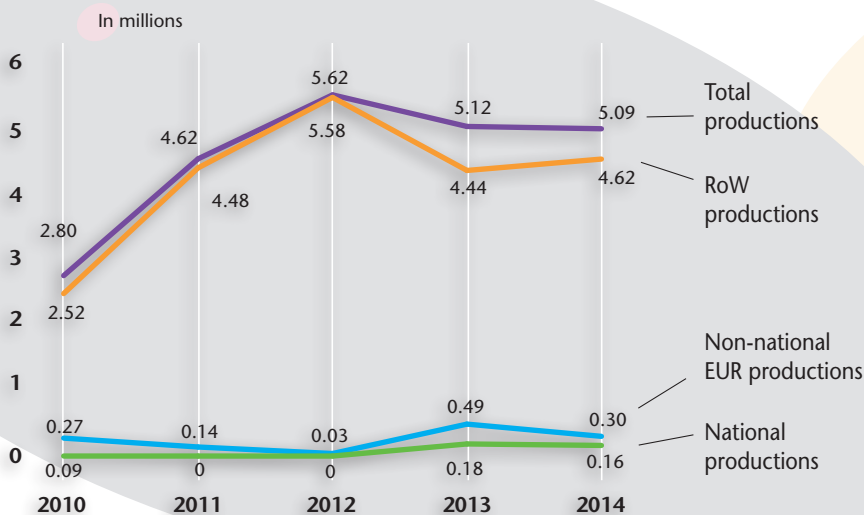
	Free to air	Public	Private
National children's channels	13	1	12
Children's channels targeting other countries			
Foreign children's channels available	10		10
National film channels	50		50
Film channels targeting other countries			
Foreign film channels available	1		

① It only includes new productions (films produced up to two years before the release year).

ANTRAK/OBS LUMIERE/OBS MAVISE



## Admissions to animation films in Turkey by country of production • 2010-2014



ANTRAK/OBS LUMIERE

## Domestic animation films by admissions worldwide • 2010-2014

Rank	Title	Country of origin	Director	Territories	Admissions
1	Ayas	TR	Mustafa Tugrul Tiryaki, Hüseyin Emre Konyali	2	198 930
2	Iksir	TR	Birkan Uz	1	110 150
3	Evlîya Çelebi ve Ölümsüzlük Suyu	TR	Serkan Zelzele	1	44 634

ANTRAK/ OBS LUMIERE

# Russian Federation

Population 2014*	143.7 million
GDP per capita 2014*	14 317 USD

## Film landscape 2014

Gross box office all films	43 332.0 bn RUB (1 150 M USD)
Admissions all films	176.10 million
Gross box office animation <sup>①</sup>	8 519.9 M EUR (37.73 M USD)
Admissions animation	34.62 million
Average admissions animation 2010-2014	33.10 million
Screens (digital screen penetration)	3 829 (96.4%)

## TV landscape 2014

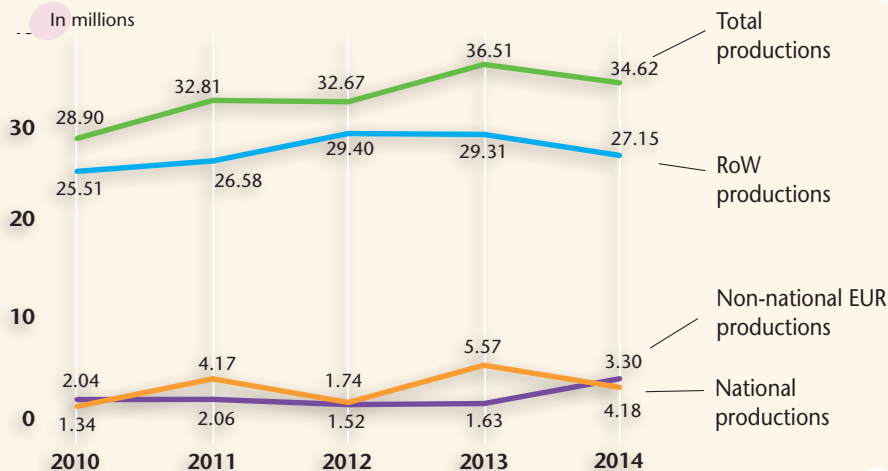
Television households (2013)	51.2 million
Digital TV households (2013)	61%

	State	Private
Children's channels in Russian language	27	23
Of which EU based channels	14	
Film channels in Russian language	79	65
Of which EU based channels	19	

① Estimated based on the average ticket price

ANTRAK, MAVISE, OBS LUMIERE

## Admissions to animation films in Russia by country of production • 2010-2014<sup>①</sup>



① It only includes new productions (films produced up to two years before the release year).

OBS LUMIERE

## Top 10 Russian animation films by admissions in the world • 2010-2014<sup>①</sup>

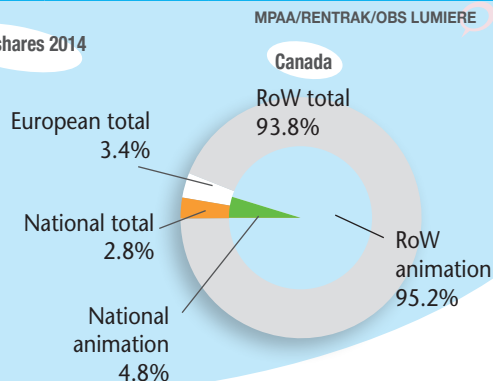
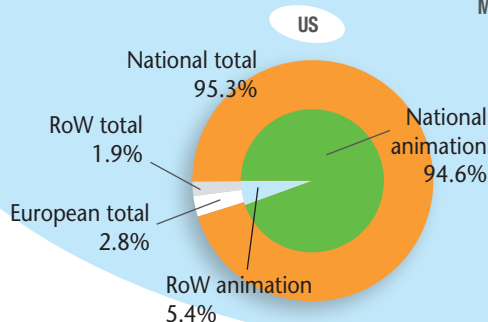
Rank	Title	Country of origin	Director	Territories	Admissions
1	Tri bogatyrya na dálnikh beregakh	RU	Konstantin Feoktistov	1	4 103 342
2	Tri bogatyrya i Shamakhanskaya tsaritsa	RU	Sergei Glezin	1	3 340 877
3	Ivan Tsarevich i Seryy Volk 2	RU	Vladimir Toropchin	1	2 818 938
4	Snezhnaya koroleva	RU	Maksim Sveshnikov, Vlad Barbe	13	1 959 863
5	Belka i Strelka. Zvezdnye sobaki	RU	Svyatoslav Ushakov, Inna Evlannikova	11	1 409 571
6	Smeshariki: Nachalo	RU	Denis Chernov	2	1 356 227
7	Belka i Strelka: Lunnye prikllyucheniya	RU	I. Evlannikova, V. Sotskov, A. Khramtsov	2	1 356 227
8	Snezhnaya koroleva 2. Snezhnyy korol	RU	Aleksey Tsitsilin	6	632 065
9	Kak poymat pero Zhar-Ptitsy	RU	Vyacheslav Plotnikov	1	426 619
10	Ot vinta 3D	RU	Olga Lopato	5	405 514

NEVAFILM/OBS LUMIERE

	North America	US	Canada
Population 2014* (million)	354.0	318.5	35.5
GDP per capita 2014* (USD)	54 267	54 678	50 577
<b>Film landscape 2014</b>			
Gross box office all films (m USD)	10 400	9877 ①	1009②
Admissions all films (million)	1 270	1155 ①	116 ①
Gross box office animation ② (m USD)	1 344	1 215	129
Admissions to animation 2014 (million)	164.17	148.39	15.78
Average admissions to animation 2010-2014 (million)	192.03	173.89	18.14
<b>Screens 2014 (digital screen penetration)</b>	43 265 (96%)	40 158 (95.7%)	3 107 (100%)

① 2013 ② Estimated based on the average ticket price

Market shares 2014



## North America

North America (US and Canada) was the second largest world market by admissions (1.270 million in 2014), only surpassed by India; and the highest grossing territory in the world by far (USD 10.4 billion in 2014).

707 films were shot in the United States in 2014 (110 of which by the majors), which places the US as the second largest production country in the world by production volume after India. On average, animation accounted for 2.8% of the production volume of the country, however, admissions to US feature animations represented 12% of the total domestic admissions in 2014. In addition, most American majors produce or own a subsidiary producing feature animation. Although Canada<sup>①</sup> only produced two animation films that year (10 over the last five years), it also participated in another 7 projects as minority producer (four with France, two with the US and one with South Korea).

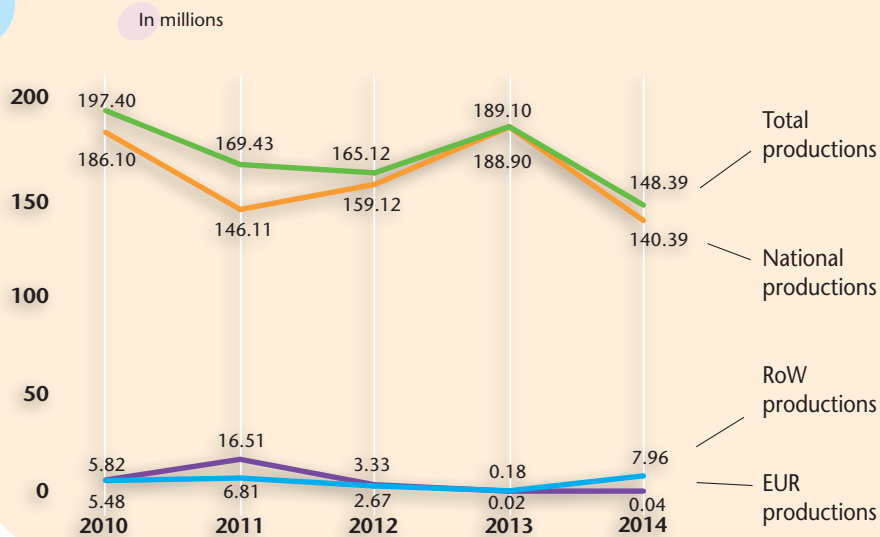
Attendance to feature animation films in the US amounted to a yearly average of 179 million admissions during the exploitation period 2010-2014 – the highest level, by far, within the countries covered by *Focus on Animation*. If we only look at new films (defined as films produced up to two years before the release date), feature animations did a yearly average of 173.9 million tickets over the same period, accounting for 14.2% of

the total admissions in the country. With similar patterns in terms of theatrical consumption of animation, Canada's biggest share of the animation pie unsurprisingly goes to films produced by its southern neighbor.

US productions took the lion's share of both the overall market and the market for animation, with a 95.3% share of the total market and 94.6% of the market for animation in 2014. In turn, the average market share for European films in the US was 5.76% during the period 2010-2014 (2.8% in 2014), with a couple of British blockbusters (mostly inward co-productions with the US) accounting for most of it. Equally, the slice of the pie for European animation films was almost non-existent most years (0.027% in 2014). Although the yearly average between 2010 and 2014 was 2.96%, this was mostly thanks to three titles, namely *Gnomeo and Juliet*, *Arthur Christmas* and *The Pirates! Band of Misfits*, which altogether represented 75% of the admissions to European animation in the country over that period (73% in the Canadian market). In turn, 29 European animation films were released in the US between 2010 and 2014 compared to only 16 in Canada.

① Data on the Canadian market do not have a comprehensive coverage of the French-speaking market. Conversely, French-speaking local productions not released in any other of the territories tracked in this report could not form part of the production volume statistics.

Admissions to animation films in US by country of production • 2010-2014<sup>①</sup>



① It only includes new productions (films produced up to two years before the release year).

RENTRAK, OBS LUMIERE

Admissions to animation films in Canada by country of production • 2010-2014<sup>①</sup>

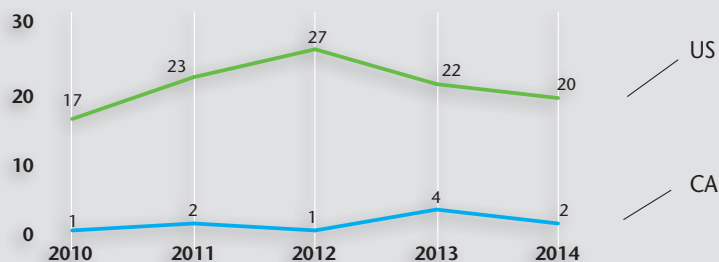


① It only includes new productions (films produced up to two years before the release year).

RENTRAK, OBS LUMIERE

## Production volume • 2010-2014 <sup>①</sup>

In number of films



<sup>①</sup> Only films with a theatrical release. Films produced but not released before the end of 2014 could not be taken into account.

RENTRAK, OBS LUMIERE

## Top 10 European animation films in the US • 2010-2014

Rank	Title	Country of origin	Director	Distributor	US admissions
1	Gnomeo and Juliet	GB inc/US	Kelly Asbury	Walt Disney Studios	11 214 220
2	Arthur Christmas	GB inc/US	Sarah Smith, Barry Cook	Sony Pictures	5 026 418
3	The Pirates! Band of Misfits	GB inc/US	Jeff Newitt, Peter Lord	Sony Pictures	3 235 821
4	Planet 51	ES/GB	J. Abad, J. Blanco	Sony Pictures	352 789
5	L'illusionniste	GB/FR	Sylvain Chomet	Sony Classics	284 257
6	Chico & Rita	ES/GB	Javier Mariscal, F. Trueba	GKids	45 771
7	Une vie de chat	FR/NL/CH/BE	J-L. Felicioli, A. Gagnol	GKids	38 268
8	Ernest & Celestine	FR/BE/LU	S. Aubier, V. Patar	GKids	31 963
9	Panique au village	BE/LU/FR	S. Aubier, V. Patar	Zeitgeist Films	18 228
10	Is the Man Who Is Tall Happy?: ...	FR	Michel Gondry	IFC Films	16 132

RENTRAK, OBS LUMIERE

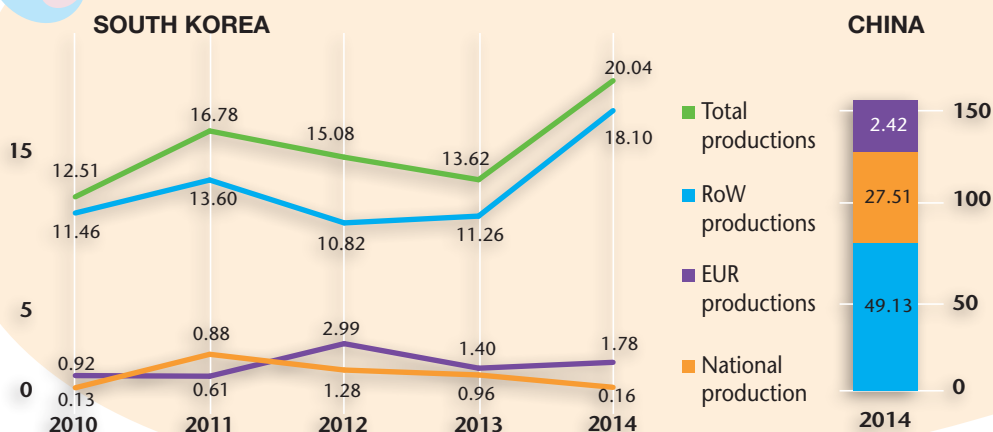
## Top 10 European animation films by admissions in Canada • 2010-2014

Rank	Title	Country of origin	Director	Distributor	Admissions in Canada
1	Gnomeo and Juliet	GB inc/US	Kelly Asbury	E1 Films	1 227 844
2	Arthur Christmas	GB inc/US	Sarah Smith, Barry Cook	Sony Pictures	656 719
3	The Pirates! Band of Misfits	GB inc/US	Jeff Newitt, Peter Lord	Sony Pictures	568 037
4	Arthur et la vengeance de Maltazard	FR	Luc Besson	Alliance	56 693
5	Un monstre à Paris	FR	Bibo Bergeron	Alliance	32 915
6	Arthur et la guerre des deux mondes	FR	Luc Besson	Alliance	17 477
7	Ernest & Celestine	FR/BE/LU	S.e Aubier, V. Patar	Metropole Films	17 152
8	Le magasin des suicides	FR/CA/BE	Patrice Leconte	E1 Films	5 085
9	Une vie de chat	FR/NL/CH/BE	J-L. Felicioli, A. Gagnol	Mongrel Media	4 652
10	Zarafa	FR/BE	J-C. Lie, R. Bezançon	E1 Films	3 553

RENTRAK, OBS LUMIERE

## Admissions to animation films in South Korea by country of production • 2010-2014<sup>①</sup>

In millions



① It only includes new productions (films produced up to two years before the release year).

RENTRAK, OBS LUMIERE

## Top 5 South Korean animation films by admissions in the world • 2010-2014

Rank	Title	Country of origin	Director	Territories	Admissions
1	Madangeul Naon Amtak	KR	Seong-yun Oh	5	2 239 162
2	Jeom-bak-i: Han-ban-do-eui Gong-ryong 3D	KR	Han Sang-Ho	2	1 216 642
3	Pororo, the Racing Adventure	KR/CN	Young Kyun Park	2	921 721
4	The Outback <sup>①</sup>	KR/US	Kyung Ho Lee	5	573 611
5	Jungle Shuffle	KR/MX	Taedong Park, Mauricio De la Orta	4	131 233

① The film did additional 875 219 admissions in China in 2014

RENTRAK, OBS LUMIERE

## Top 5 Chinese animation films by admissions in China • 2010-2014

Rank	Title	Country of origin	Director	Distributor	Admissions
1	Boonie Bears, to the Rescue!	CN	Ding Liang, Fuyuan Liu	Multiple	2 239 162
2	Xi Yang Yang Yu Hui Tai Liang Zhi Fei Ma Qi Yu Ji	CN	Yiu Chung William Kan	Huayi Bros	1 216 642
3	Yugo and Lala 2	CN	Wang Yunfei	Multiple	921 721
4	Seer IV	CN	Zhang Jun Wang	Multiple	573 611
5	The Magic Brush	CN	Zhixing Zhong	China Film Group	131 233

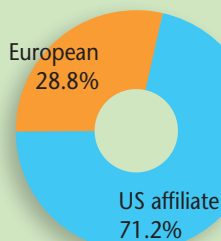
RENTRAK, OBS LUMIERE

## Top 5 Japanese animation films by admissions in the world<sup>①</sup> • 2010-2014

Rank	Title	Country of origin	Director	Territories	Admissions
1	Kari-gurashi no Arietti	JP	H. Yonebayashi, G. Rydstrom	20	4 783 403
2	Doragon bōru Z: Kami to kami	JP	Masahiro Hosoda	11	3 413 925
3	Kaze tachinu	JP	Hayao Miyazaki	23	2 209 821
4	Seinto Seiya: Legend of Sanctuary	JP	Kei'ichi Sato	6	1 657 240
5	Space Pirate Captain Harlock	JP	Shinji Aramaki	6	1 464 946

① The world, as defined in the methodology, does not include Japan, since domestic market figures were not available.

RENTRAK, OBS LUMIERE



Population 2014*	507 million
GDP per capita 2014*	36 700 USD
Television households	210.76 million
Digital TV households	88%

		Free to air	Public	Private
<b>EU-based children's channels</b>	329	22	23	306
Of which, channels of US affiliates (in EU)	234			
Other European (non-EU) children's channels	53			
<b>EU-based film channels</b>	394	6	4	390
Of which, channels of US affiliates (in EU)	162			
Other European (non-EU) film channels	139			

OBS MAVISE/IHS

Mapping the animation industry with regard to television has proved so far to be a challenge. It is difficult to establish a reliable picture of production volume for television without the availability of a comprehensive European database of TV animation. This section will provide an overview of the European TV market with a particular focus on children's channels and services.

The development of specific television channels that target children began in the United States in the 1980s along with the general evolution of niche television channels that had growing access to cable or satellite capacity for distribution. In Europe, one of the earliest examples of a children's TV channel is Canal J, launched in 1985 in France. The first Disney Channel began broadcasting in 1995, followed by French channels Mangas and Télétoon+ (in 1995). In the meantime Cartoon Network (1993) and Nickelodeon (1995) had arrived in Europe.

The first graph on page 57 shows the children's channels established in the EU distinguishing between public and private, and those owned by US affiliate companies established in the EU. The total also includes the various linguistic channel versions that target a range of European countries. While not added to the census here, there also exist at least another 40 HD simulcasts of the main TV channels. The public service broadcasters in 11 EU countries have specific children's channels: Belgium, Czech Republic, Denmark, Germany, Ireland, Italy, the Netherlands, Poland, Spain, Sweden and the United Kingdom. The second graph outlines the country of origin of TV channels and indicates the importance of the

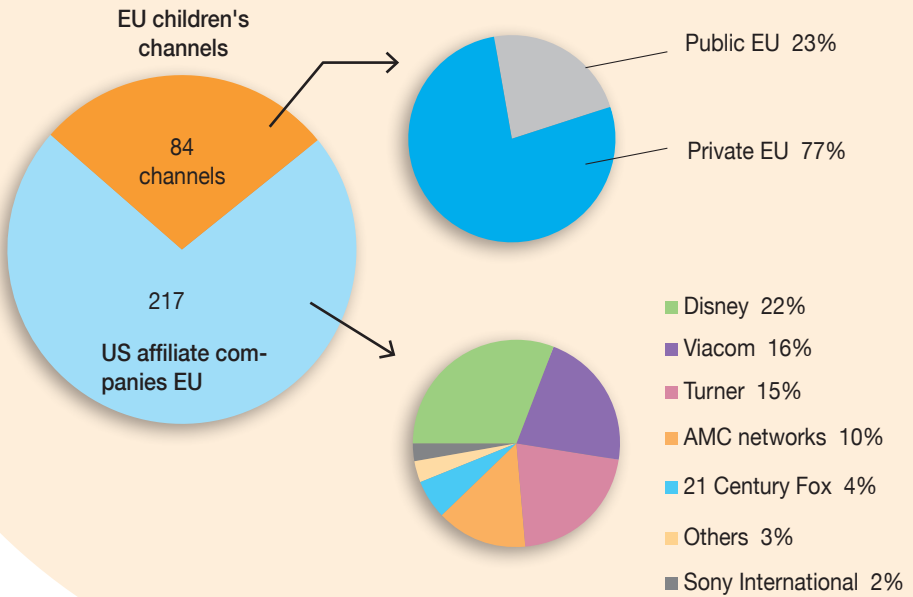
UK, the Czech Republic and the Netherlands as European homes of major US brands.

The graphs on pages 58 and 59 provide an analysis of data from ROVI International to illustrate the volume of animation on the main European TV channels, distinguishing national, European and non-European origin. It should be noted that the ROVI data covers 14 EU territories, and not all channels in these territories. The focus in this section is on animation TV series and not on animated feature films. Not all children's channels carry a majority of animation programming (such as CBBC in the UK or June in France). Several channels indicate a strong support for national animation such as Your Family Entertainment (now Fix&Foxi) from Germany, Cbeebies from the UK, Rai Gulp from Italy and the French channels Canal J, Gulli, Télétoon+ and Tiji. For smaller countries, the data illustrates the extent to which other European content plays an important role on national channels. For example, the data shows the significance of British content on the Irish children's channel RTE Junior, and to a lesser extent on the Swedish public children's channel. French animation is also strongly present on the national animation channels in Finland, Belgium, Denmark and Sweden. An overview of the US channel brands provides some interesting insights into the programming of different country versions (note for example, the levels of French programming on the French Disney Junior, Disney XD and Boomerang).

OBS MAVISE/ROVI INTERNATIONAL SOLUTIONS

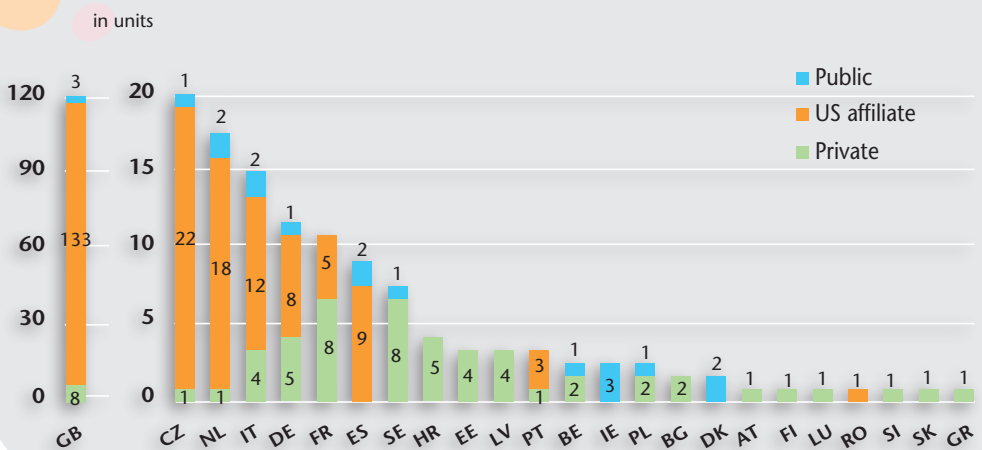


Children's channels established in the EU28 and types of ownership • 2015



OBS MAVISE

National origin/establishment of EU children's channels • 2015

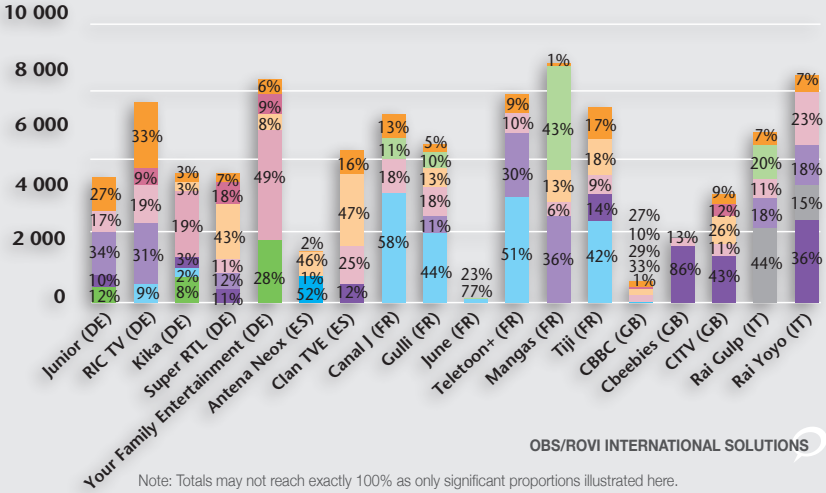


OBS MAVISE

## National children's channels and origin of animation • 2013

in units

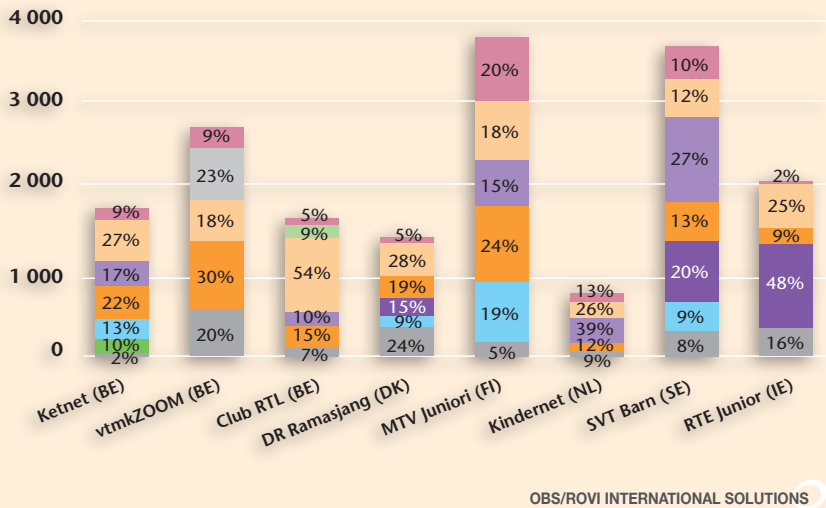
- DE ■ ES ■ FR ■ GB ■ IT ■ Mixed co-productions
- Other EU ■ US ■ CA ■ JP ■ Other Non-European



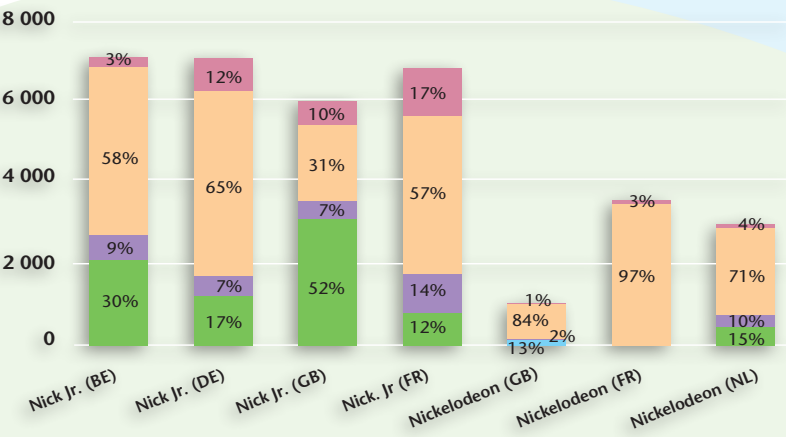
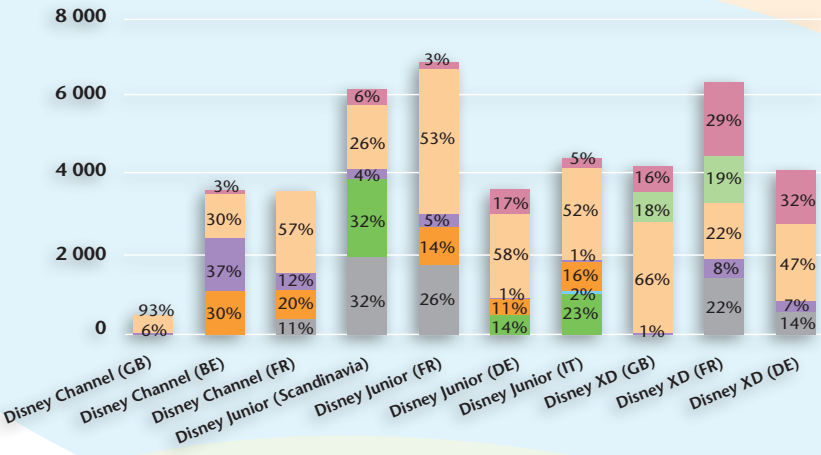
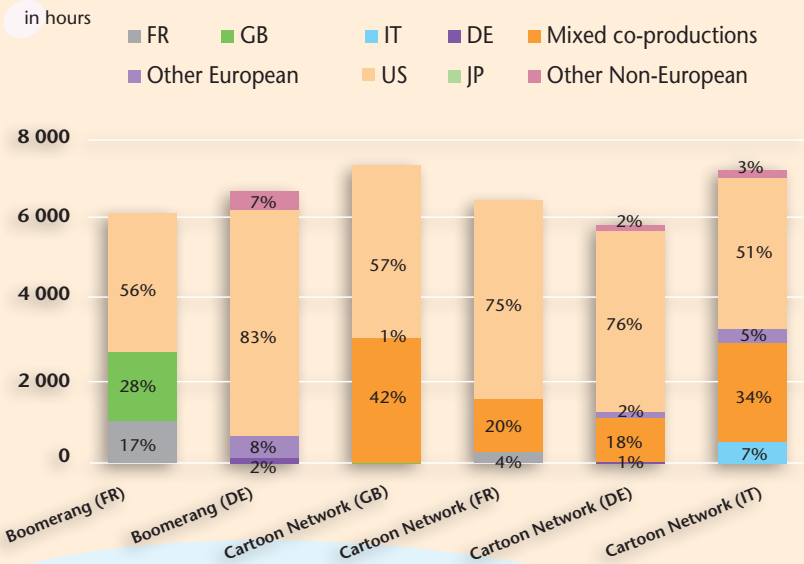
## National children's channels in smaller countries and origin of animation • 2013

in hours

- National ■ DE ■ FR ■ GB ■ Other EU
- Mixed co-productions ■ US ■ JP ■ Other Non-European



Origin of animation on the Pan-European children's television brands • 2013



Note: Totals for all three graphs may not reach exactly 100% as only significant proportions illustrated here.

# European programme awards

## TV awards for European productions at the Annecy International Animation Film Festival • 2010-2014

By year of award

Film	Country of origin	Award year	Director	Award
En sortant de l'école "Tant de forêts"	FR	2014	Burcu Sankur, Geoffrey Godet	Cristal TV Production
Le Parfum de la carotte	FR/BE/CH	2014	Rémi Durin, Arnaud Demuyneck	Jury Award TV special
Room on the Broom	GB/DE	2013	Max Lang, Jan Lachauer	Cristal TV Production
Tom & The Queen Bee	DE	2013	Andreas Hykade	Special Award TV series
L'Automne de Pougne	FR	2013	P-L. Granjon, Antoine Lanciaux	Award for best TV special
Benjamin Scheuer "The Lion"	GB/DE	2013	Peter Baynton	Special Jury Award
The Gruffalo's Child	GB/DE	2012	J. Weiland, Uwe Heidschötter	Award for best TV special
The Amazing World of Gumball "The Quest"	US/FR	2011	Mic Graves, Ben Bocquelet	Cristal TV Production
Le petit Nicolas "À la récré on se bat"	FR/LU/IN	2011	Arnaud Bouron	Special Award TV series
Das Bild der Prinzessin	DE	2011	J. Weiland, Klaus Morschheuser	Award for best TV special
Der Kleine und das Biest	DE	2010	J. Weiland, Uwe Heidschötter	Cristal TV Production
Dragons et Princesses "Le garçon qui ..."	FR	2010	Michel Ocelot	Special Award TV series
The Gruffalo	GB/DE	2010	Jakob Schuh, Max Lang	Award for best TV special

ANNECY/MIFA [HTTP://WWW.ANNECY.ORG/HOME](http://WWW.ANNECY.ORG/HOME)

## TV awards at the British Animation Awards • 2010-2014

By year of award

Title	Country of origin	Award year	Director	Award
The Amazing World of Gumball: The Apology	UK/IR/US	2014	Mic Graves, Ben Bocquelet	Best Children's series
Peppa Pig: Mr Bull in a China Shop	UK	2014	Philip Hall, Joris van Hulzen	Best Pre School series
The Amazing World of Gumball: The Quest	UK/IE/US	2012	Mic Graves, Ben Bocquelet	Best Children's series
Ben & Holly's Little Kingdom: Acorn Day	UK	2012	Neville Astley, Mark Baker	Best Pre School series
Shaun the Sheep: Ewe've Been Framed	UK	2010	Richard Webber	Best Children's series
Ben & Holly's Little Kingdom: Big Bad ...	UK	2010	Neville Astley, Mark Baker	Best Pre School series

BRITISH ANIMATION AWARDS [HTTP://WWW.BRITISHANIMATIONAWARDS.COM/](http://WWW.BRITISHANIMATIONAWARDS.COM/)

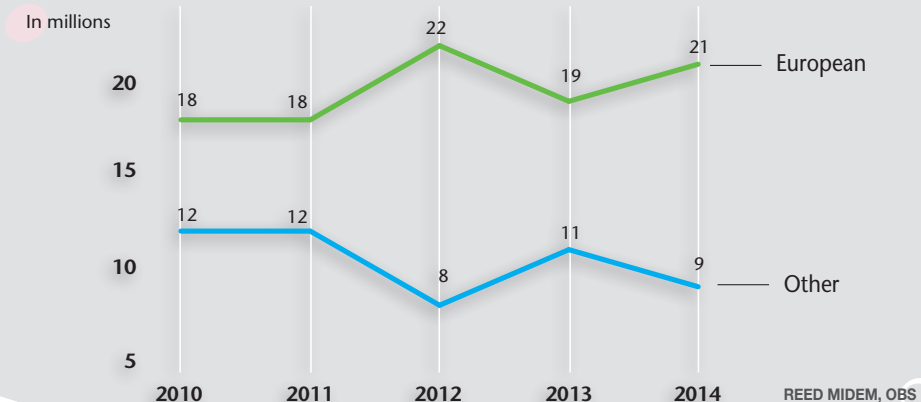
## Cartoons at the Bay Pulcinella Awards • 2010-2014

By year of award

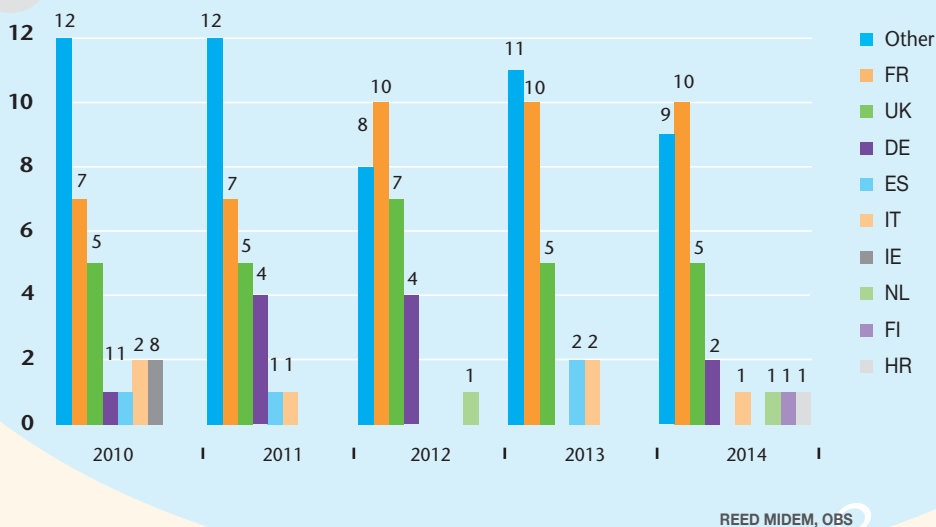
Film	Country of origin	Award year	Director	Award
Patchwork Pals	DE	2014	A. Steffen, A. Depper	Pulcinella Award Best Pre School TV Series
Les As de la Jungle à la Rescousse	FR	2014	David Alaux, Eric Tosti	Pulcinella Award Best Kids TV Series
Hello, World (Bonjour le monde)	FR	2014	A-L. Koehler, É. Serre	Pulcinella Award Best TV Pilot
The Amazing World of Gumball	UK/IE/US	2012	M.Graves, B.Bocquelet	Pulcinella Award Best Kids TV Series
Extreme Football	FR/IT	2012	Franck Michel	Pulcinella Award Best TV Pilot
The Gruffalo's Child	UK/DE	2012	U.Heidschötter, J. Weiland	Pulcinella Award Best European production
Tinga Tinga Tales	UK	2011	Richard Jeffery	Pulcinella Award Best Pre School TV Series
Fun with Claude	UK	2010	Owen Stickler	Pulcinella Award Best Pre School TV Series
Angelo Rules	FR/UK	2010	Chloé Miller, Franz Kirchn	Pulcinella Award Best Kids TV Series
Verne on Vacation	UK/US	2010	Sylvain Marc	Pulcinella Award Best TV Pilot

CARTOONS ON THE BAY [HTTP://WWW.CARTOONSBAY.COM/EN/](http://WWW.CARTOONSBAY.COM/EN/)

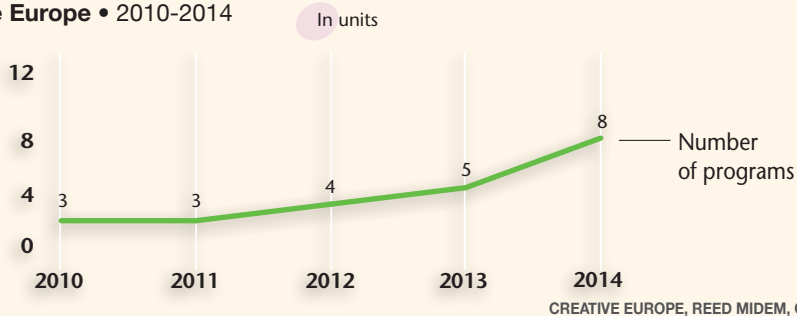
## Animation programmes listed in MIP Junior Top 30 lists of most requested programmes, showing European compared to Other origin • 2010-2014



## Animation programmes listed in MIP Junior Top 30 lists of most requested programmes, by country • 2010-2014



## Animation TV projects in Top 30 and supported by Media sub-programme of Creative Europe • 2010-2014



Footnote: In 2013 and 2014, three European programmes, supported by Creative Europe Media sub-programme, were listed among the top five most requested programmes.

# European television licensors

**31 WORLD LICENSORS, OUT OF THE TOP 150 GLOBAL, WITH ANIMATION-RELATED PROPERTIES - EUROPEAN COMPANIES ARE HIGHLIGHTED IN BOLD**

World rank	Company	Global retail sales of licensed product (USD M)	Properties sample (non exhaustive)	Country
1	The Walt Disney Company (*)	45 200	Frozen, Big Hero 6, Planes, Star Wars Rebels series	US
4	Iconix Brand Group	13 000	Strawberry Shortcake	US
5	Mattel	9 000	Thomas & Friends (**), Monster High	US
6	Sanrio	6 500	Hello Kitty	JP
7	Warner Bros.	6 000	Looney Tunes, Tom & Jerry, Scooby-Doo	US
9	Nickelodeon	5 500	Sponge Bob, Teenage Mutant Ninja Turtles	US
10	Hasbro	5 060	Little Pony, Transformers	US
12	Rainbow	4 300	Winx Club	IT
17	Dreamworks Animation	3 300	How to train your Dragon, Penguins of ..	US
27	Twentieth Century Fox Consumer ...	2 100	The Simpsons, Ice Age	US
28	Cartoon Network Enterprises...	2 000	Adventure Time, Regular Show, Gumball, Ben 10	US
33	NBC Universal	2 000	Despicable Me	US
34	The Pokemon Company Intl.	2 000	Pokemon animation series	US
36	<b>BBC Worldwide</b>	1 800	Sarah and Duck, Dino Paws	UK
40	<b>Giochi Preziosi Group</b>	1 500	Gormiti, Puppy in my pocket, Dinofroz	IT
51	<b>Rovio Entertainment</b>	1 100	Angry Birds, Stella	FI
61	<b>Entertainment One</b>	934	Peppa Pig,	UK
66	Saban Brands	850	Julius Jr., Popples, Luna Petunia, Emojville	US
67	<b>Fremantlemedia</b>	800	Tree Fu Tom, Kate & Mim-Mim, Danger Mouse	UK
69	<b>Lego Group (***)</b>	650	The Lego Movie	DK
76	<b>Studio 100 Group</b>	500	Maya the Bee, Heidi, Vic the Viking	DE
80	<b>ITV Studios Global Entertainment</b>	400	Thunderbirds are Go	UK
84	TOEI Animation Enterprises	380	Dragon Ball, Sailor Moon, Pretty cute	JP
89	Bromelia Produções	300	Galinha Pintadinha	BR
96	<b>m4e Group</b>	254	Mia and Me, Tip the Mouse	DE
99	<b>Mind Candy</b>	250	Moshi Monsters, PopJam, World of Warriors	UK
103	<b>DHX Media</b>	240	Caillou, Johnny Test	UK
105	Sony Pictures Consumer Products	225	Hotel Transylvania	US
113	Nelvana Enterprises	200	Beyblade, Franklin, Little Charmers, Babar	US
123	<b>Aardman Animations</b>	140	Shaun the Sheep, Wallace & Gromit	UK
132	4K Media	120	Yu-Gi-Oh!	JP

## TOP 150 GLOBAL LICENSORS, LICENSE! GLOBAL MAGAZINE, MAY 2015

(\*) 11 of Walt Disney's franchises generate more than 1B USD each, globally and annually.

(\*\*) Thomas & Friends (sold in 2012 by Hit Ent. to Mattel) is the No. 1 preschool toy license in the U.S., according to The NPD Group, and is present in over 185 territories in 30 languages.

(\*\*\*) In the first half of 2014 the LEGO Group became the world's largest toy company by market value, surpassing Mattel. Source: Wikipedia

## Licensing

Licensing exploitation benefits are the incomes generated from the use of a content, property, brand or character in other products (publishing, toys, etc.). The increase in children's TV channels has not led to an increase in production funding. As broadcaster investment drops, licensing the properties becomes a necessary source of recoupment. But broadcasters are also acquiring digital rights plus licensing and merchandising rights as part of the global deals with producers<sup>①</sup>. All are now in the business of IPs and Brands rather than single titles. As shown above, 31 companies (including 13 European) with animation-related properties were in the Top 150 Global Licensors list in 2014<sup>②</sup>.

① The Business of Children's Content, IHS, mipcom 2014.

② License! Global magazine, May 2015

## On demand services

This section briefly introduces some themes concerning the development of on-demand services and the significance for the animation industry. The MAVISE database quantifies on-demand services in Europe and includes more than 100 that have been identified as targeting children. In addition, the catch-up TV services of the most important broadcasters either include children's programming and animation (BBC iPlayer) or have specific catch-up services for children (Gulli Replay, Kika Plus, Ludo.fr from France Télévisions). Providing data and analysis on the on-demand markets presents several challenges. Firstly, data on viewing and consumption of on-demand services is very difficult to access and the major players do not tend to share this information. Public broadcasters generally provide an overview of statistics on downloads as is the case of the BBC iPlayer, but for the BBC their analysis of the demographics of those using the service starts with a first cohort of 16-34.

A second challenge is providing an overview of the types of content available on catalogues. Given the vast numbers of titles on the catalogues and the territorial divides that imply both a variety in the content of catalogues and a technological challenge in gathering data on catalogues in a range of countries, expensive customised research is required to access this data. The graphic below provides an example of an analysis of the origin of

animated audiovisual works on a sample of major on-demand services.<sup>①</sup>

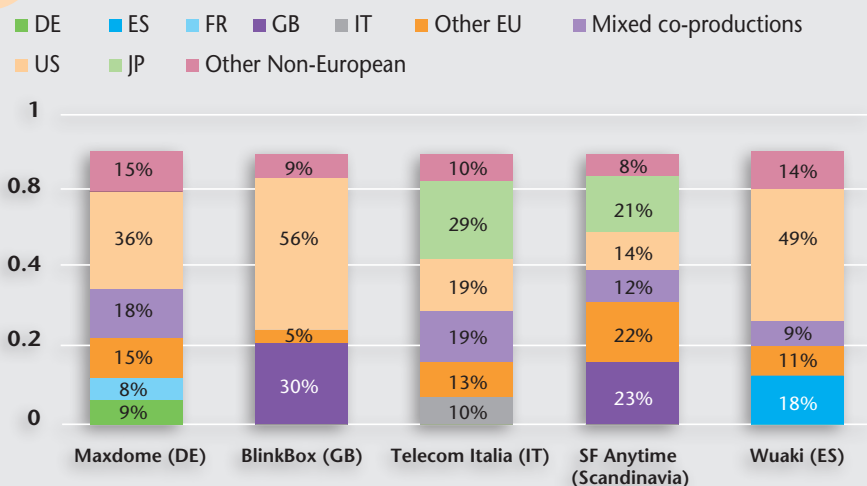
Despite these challenges, it is clear that content for children, including animation, is becoming a new hot bed of competition for the major VOD players who, according to press reports<sup>②</sup>, are concluding agreements, acquiring content and launching services. Amazon has recently announced a deal with Viacom for exclusivity on Nickelodeon shows. Specific child oriented services have been launched such as the Netflix "For Kids" section. Netflix has developed deals with Disney, Dreamworks, Cartoon Network and Mattel among others. The momentum for these developments is based on the changing consumption habits and increased sophistication of children regarding equipment, with content producers such as Nickelodeon and Disney developing smartphone and tablet apps to deliver their content directly to children. Also of importance is the prospect for parents of having a dedicated children's area online potentially free of advertising and supposedly safe from inappropriate content, as claimed by the Youtube kids app.

The challenges and opportunities for European animation presented by these developments will be furthered examined in the broader mapping animation project.

① Based on data provided to the European Audiovisual Observatory from ROVI International. Among the five services presented here, Maxdome, Telecom Italia and Blinkbox have significantly more animation works in their catalogues (10-20%) than SF Anytime or Wuaki.

② Variety, New York Times, Forbes, iKids/Kidscreen.com

**Origin of TV animation in a sample of European VOD services - October 2014**



For the production of *Focus on Animation* the central concepts are defined as follows:

**Europe:** With regard to data on film attendance and production volume, Europe comprises the 36 European territories for which the European Audiovisual Observatory possesses a relevant level of coverage. It includes comprehensive data for 29 European territories (Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Luxembourg, Netherlands, Norway, Poland, Portugal, Romania, Russian Federation, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey and United Kingdom & Ireland) as well as partial data for another seven European countries (Bosnia-Herzegovina, Cyprus, Former Yugoslavian Republic of Macedonia, Iceland, Liechtenstein, Malta, and Montenegro). Please note that the available data on admissions aggregates the UK and Ireland, therefore it is not possible to provide separate figures for each country. However, statistics on production volume in the UK and Ireland will be provided separately.

When it comes to structural figures, the scope of coverage comprises the EU Member States as well as other countries which are members of the former MEDIA Programme or of the current Creative Europe Programme. In fact, it means data on 34 countries (the abovementioned 36 plus Albania, excluding Bosnia-Herzegovina, the Russian Federation and Turkey).

Concerning television data, the MAVISE database covers the 40 countries which are members of the European Audiovisual Observatory. For the purpose of basic European data, the focus was on the EU28. The analysis of the data on origin of animation programming is based (except in the case of France) on data from ROVI International Solutions and covers just 14 EU territories that are dealt with here (Austria, Belgium, Denmark, France, Finland, Germany, Ireland, Italy, Luxembourg, Netherlands, Portugal for 2013 only, Spain, Sweden and the United Kingdom).

**World:** Europe plus 11 non-European territories (Argentina, Australia, Brazil, Canada, Chile, Colombia, South Korea, Mexico, New Zealand, Venezuela and the United States). In addition, data for China was only available for 2014; consequently it could only be used to produce statistics for that particular year but it does not form part of the calculation of global time series.

**Country of origin:** For film, this refers to the country of establishment of the producer(s) with the highest financial investment in a film. Only films entirely or in majority produced by a given or several producers from one country will count as films produced in a given country. Other films in which producers based in that country had a minority role in the production (minority co-producers) will not be counted as films produced in that country.

In relation to television, the term country of origin of TV channels implies the country where the channel or service is licensed or registered, or established.

**Production volume:** Depending on the country, this takes into account the number of films starting principal photography, being granted a exhibition visa or even being released in a given year or period.

**New production:** For the purpose of this analysis, a new production is a film released no later than 2 years after the year of production.

**Number of admissions:** Except for the World section of this booklet (in which all admissions generated are taking into account), all aggregates of admissions for a film, in a country or territory, for a given year have been calculated taking into account only new productions (see above). Only admissions generated in the year of analysis will be computed. Hence, the aggregate of admissions to animation films in a given country in 2012 will be calculated by adding up the admissions generated in that country during 2012 by all animation films produced in 2012, 2011 and 2010. Hence, the aggregate for the period 2012-2014 in that country will be the result of adding up the results for each year calculated as described before.

**Disclaimer:** Most film statistics in *Focus on Animation* have been obtained using the European Audiovisual Observatory database *Lumière*. Since data on films released in 2015 is not available at the time of the publication, films produced in 2014 and before but not released before 2015 will not appear in the statistics. Therefore some indicators for 2014 may appear slightly lower than what they would be in reality.



## Sources

### Databases

**LUMIERE Database** [www.lumiere.obs.coe.int](http://www.lumiere.obs.coe.int)

**MAVISE Database** [www.mavise.obs.coe.int](http://www.mavise.obs.coe.int)

**NL Amadeus Database (Bureau van Dijk)**  
<https://amadeus.bvdinfo.com>

### Institutions and companies

**AT Österreichisches Filminstitut (ÖFI)** [www.filminstitut.at](http://www.filminstitut.at)

**BE Centre du cinéma et de l'audiovisuel (CCA)**  
[www.audiovisuel.cfwb.be](http://www.audiovisuel.cfwb.be)

**BE Vlaams Audiovisueel Fonds (VAF)** [www.vaf.be/](http://www.vaf.be/)

**BG National Film Center (NFC)** [www.nfc.bg](http://www.nfc.bg)

**CA Canadian Media Prod. Assoc. (CMPA)** [www.cmpa.ca](http://www.cmpa.ca)

**CH Office fédéral de la statistique (OFS)** [www.admin.ch/bfs](http://www.admin.ch/bfs)

**CZ Czech Film Center** [www.filmcenter.cz](http://www.filmcenter.cz)

**CZ Ministry of Culture** [www.mkcr.cz](http://www.mkcr.cz)

**CZ Czech State Cinematography Fund** [www.fondkinematografie.cz](http://www.fondkinematografie.cz)

**CZ Unie Filmových Distributorů (UFD)** [www.ufd.cz](http://www.ufd.cz)

**DE FFA** [www.ffa.de](http://www.ffa.de)

**DE SPIO** [www.spio.de](http://www.spio.de)

**DK Danish Film Institute (DFI)** [www.dfi.dk](http://www.dfi.dk)

**DK Statistics Denmark** [www.dst.dk](http://www.dst.dk)

**EE Estonian Film Institute** [www.filmi.ee](http://www.filmi.ee)

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**EU Eurostat** [ec.europa.eu/eurostat](http://ec.europa.eu/eurostat)

**EU Europa Cinemas** [www.europa-cinemas.org](http://www.europa-cinemas.org)

**EU CARTOON** [www.cartoon-media.eu](http://www.cartoon-media.eu)

**EU International Animation Film Market (MIFA)**  
[www.anney.org/mifa](http://www.anney.org/mifa)

**EU Creative Europe - MEDIA Sub-programme of the European Commission** <http://ec.europa.eu/programmes/creative-europe>

**EU Education, Audiovisual and Culture Executive Agency of the European Commission (EACEA)** <http://eacea.ec.europa.eu>

**FI Finnish Film Foundation (FFF)** [www.ses.fi](http://www.ses.fi)

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**FR Eurodata TV Worldwide** [www.mediametrie.fr/eurodatatv](http://www.mediametrie.fr/eurodatatv)

**FR CITIA** [www.citia.org](http://www.citia.org)

**FR Reed Midem** [www.miptv.com](http://www.miptv.com)

**GB British Film Institute (BFI)** [www.bfi.org.uk](http://www.bfi.org.uk)

**GB Screen International** [www.screendaily.com](http://www.screendaily.com)

**GB Animation UK** <http://animationuk.org>

**GB IHS Technology** <http://technology.ihs.com>

**GR Greek Film Center** [www.gfc.gr](http://www.gfc.gr)

**HR Croatian Audiovisual Centre (HAVCR)** [www.havc.hr](http://www.havc.hr)

**HU National Film Office (NFO)** [www.nemzetifilmiroda.hu](http://www.nemzetifilmiroda.hu)

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**IS Icelandic Film Centre** [www.icelandicfilmcentre.is](http://www.icelandicfilmcentre.is)

**IS Hagstofa Islands (HI)** [www.statice.is](http://www.statice.is)

**IT ANICA** [www.anica.it](http://www.anica.it)

**IT Cinetel** [www.cinetel.it](http://www.cinetel.it)

**IT DGC-MiBACT** [www.cinema.beniculturali.it](http://www.cinema.beniculturali.it)

**IT MEDIA Salles** [www.mediasalles.it](http://www.mediasalles.it)



**JP EIREN Motion Picture Association of Japan** [www.eiren.org](http://www.eiren.org)

**JP UNIJAPAN** [www.unijapan.org](http://www.unijapan.org)

**KR Korean Film Council (KOFIC)** [www.koreanfilm.or.kr](http://www.koreanfilm.or.kr)

**LT Lithuanian Film Center** [www.lkc.lt](http://www.lkc.lt)

**LU Centre national de l'audiovisuel (CNA)** [www.cna.public.lu](http://www.cna.public.lu)

**LU ROVI International Solutions** <http://www.rovicorp.com>

**LV National Film Centre (NFC)** [www.nfc.lv](http://www.nfc.lv)

**ME Ministry of Culture** [www.mku.gov.me](http://www.mku.gov.me)

**MK Macedonian Film Agency** [www.filmfund.gov.mk](http://www.filmfund.gov.mk)

**MT Malta Film Commission** [www.maltafilmmcommission.com](http://www.maltafilmmcommission.com)

**NL MaccsBox** [www.maccsbox.nl](http://www.maccsbox.nl)

**NL Nederlands Filmfonds (NFF)** [www.filmfund.nl](http://www.filmfund.nl)

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[www.film distributeurs.nl](http://www.film distributeurs.nl)

**NO Film og Kino** [www.filmweb.no/filmogkino](http://www.filmweb.no/filmogkino)

**NO Norsk Filminstitutt (NFI)** [www.nfi.no](http://www.nfi.no)

**NZ New Zealand Film Commission** [www.nzfilm.co.nz](http://www.nzfilm.co.nz)

**NZ MPDA** [www.mpda.org.nz](http://www.mpda.org.nz)

**PH National Statistical Coordination Board (NSCB)**  
[www.nscb.gov.ph](http://www.nscb.gov.ph)

**PL Boxoffice.pl** [www.boxoffice.pl](http://www.boxoffice.pl)

**PL Polish Film Institute (PISF)** [www.pisf.pl](http://www.pisf.pl)

**PT Instituto do Cinema e do Audiovisual (ICA)** [www.ica-ip.pt](http://www.ica-ip.pt)

**RO Centrul National al Cinematografiei (CNC)**  
[www.cncinema.abt.ro](http://www.cncinema.abt.ro)

**RU Nevafilm Research** [www.nevafilm.ru](http://www.nevafilm.ru)

**SE Swedish Film Institute (SFI)** [www.sfi.se](http://www.sfi.se)

**SG Media Development Authority** [www.sfc.org.sg](http://www.sfc.org.sg)

**SI Slovenski Filmski Center (SFC)** [www.film-center.si](http://www.film-center.si)

**SK Slovak Film Institute (SKFI)** [www.sfu.sk](http://www.sfu.sk)

**TR Antrakt** [www.antraktsinema.com](http://www.antraktsinema.com)

**US International Movie Database (IMDb)** [www.imdb.com](http://www.imdb.com)

**US MPAA** [www.mpa.org](http://www.mpa.org)

**US Rentrak** [www.rentrak.com](http://www.rentrak.com)

**International Monetary Fund** [www.imf.org](http://www.imf.org)

### Trade press

**DE Blickpunkt Film** [www.media.biz.de/film](http://www.media.biz.de/film)

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**GB Screen International** [www.screendaily.com](http://www.screendaily.com)

**IT Giornale dello Spettacolo**  
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