A publication of the European Audiovisual Observatory

Mapping the Animation Industry in Europe

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OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
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Executive summary

The following are the key findings:

Animation production and distribution in Europe

- 14.7% of European admissions go to animation films.
- European animation only gets 20% of the animation market in Europe.
- A yearly average of 50 animation films produced in Europe.
- Russia, the UK and France accounting for more than half of the yearly average admissions to animation in Europe between 2010 and 2014.
- 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.
- UK animation – with 53.5 million admissions abroad, tops the list when it comes to admissions abroad.
- From a total of 301 (plus an additional 40 HD simulcasts), 217 children channels are established in the European Union by US affiliates.
- France stands as the first European country with the highest number of TV animation hours produced, with 285 hours in 2015.
- The proportion of European works broadcast by European children channels seems to be linked to the dynamics of each national animation industry. UK or France children channels propose a high share of national animation.
- The proportion of European animation also strongly varies between European VOD paltforms. US (and sometimes Japan) are generally the first source of programming.

The animation industry in transition

- The measurement of the European animation industry is a challenge: there is no comprehensive data available to put a total value on the size of the European animation industry. The prolific and detailed data available for France is an exception, and the few national reports available are quite outdated.
- Already a globalised market, the animation industry witnesses the emergence of new Asian players moving from a statute of mere sub-contractors to a stature of co-producers. This represents both an opportunity for European producers to expand beyond the European market, but also a difficulty in retaining Intellectual property rights.
- The pre-financing of animation is under pressure: the major broadcasters' revenues are at best stagnating; they are challenged by multiple children channels which do not have the resources to significantly invest in original programming.
- International pre-sales and exports are increasingly needed to compensate for the decline of financing in each national market. Among audiovisual programmes, animation is already the category with the largest European circulation.

- As on-demand services are integrating more and more children's programming, emerging new internet players may also become significant new outlets for animation, but only in the medium term.
- Internet brings also new opportunities for producers and rights holders: distributing directly to the consumers, including with the view to strengthen the brands and therefore increase the appeal of programmes for TV channels; testing new formats and detecting new talents.
- In a transition context, building (or reviving) strong brands is more important than ever. Brands can be born outside of the traditional TV or toys domains, e.g. from games or applications. And partnerships around brands are increasingly established right from the development phase.
- The management of Intellectual property rights has become (one of) the key roles of producers. It requires specific skills and a certain level of scale. Broadcasters and producers, otherwise partners, may increasingly compete for the control of IPs.
- Animation has many opportunities to enlarge its audience, to teens and adults. Moreover, animation is an industrial know-how that can be applied in multiple industrial sectors.
- The level of investment in the development of new brands, the necessity of obtaining worldwide pre-sales or distribution deals, and the opportunity of relocating studios in Europe have increased the need for scale and therefore have led to a concentration process.

Public funding

- There are three main forms of public support to the audiovisual production: direct public funding, tax incentives and mandatory direct investments for broadcasters. Animation can be either supported by specific funding schemes, or can be eligible for schemes supporting any category of programmes.
- Whereas direct funding schemes specific to animation are available in 11 EU countries, tax incentives schemes are almost always generalist, i.e. targeting all categories of programmes, with the exception of UK's animation tax relief. Generalist tax incentives schemes may not be perfectly suited to the peculiarities of animation, in terms of budget or duration of production, or even in terms of the eligibility criteria.
- Even if not specific to the animation industry, tax incentives seem to have a measurable effect on the level of production; this has led to a competition between European countries based on financing and not on talent, as countries compete to offer the most attractive tax incentive schemes. However, there is no evidence that the multiplication of tax incentive schemes has per se driven a decrease of public funding.
- There is a growing concern that tax incentives should focus on the production of content, and anticipate the decreasing role of broadcasters in the financing of animation. To some extent, tax incentives should not only lower the costs of production, but also bridge the lack of pre-financing by broadcasters until the programme recoups its investments through its exploitation by new platforms.
- Mandatory direct investments can apply to all broadcasters or only Public Service Broadcasters. Animation (or children's programming or "young audiences programming") can count as part of compliance but rarely benefits from specific obligations. The level of mandatory investments is generally correlated to the revenues or the programming

expenses of the broadcasters. Mandatory direct investments for animation, as for other categories of programming, therefore may decline as broadcasters revenues are under pressure.

- Generally speaking, obligations and/or public missions have made the Public Service broadcasters the leading investors among broadcasters.

Training

- Training in the animation sector faces the challenge of fast evolving technologies. Answers to this challenge include the specialisation of certain animation schools in 3D animation; tailored professional training sessions and online training.
- In response to the lack of a qualified workforce, some schools or training programmes are backed by animation studios or even created by an animation studio.
- Animation is increasingly integrated as one of the specialisation of schools addressing also video games, digital effects or software development.
- The employability of animation students can be fostered by the use of English as a teaching language, exchanges or joint projects between European schools.

Festivals and awards

- A large array of festivals dedicated to animation is organised in Europe and they usually include a marketplace and conferences. Beyond the traditional “master classes”, some festivals tend to develop a large training offer.
- Animation festivals tend to increase their scope by integrating both programmes aimed at adult audiences and niche programming (e.g. animated documentaries).
- Animation is also increasingly well-represented within other festivals with a focus on children, but also on documentaries or on music.
- Festivals with the focus on image technologies also tend to integrate animation, often together with video games or special effects.

Introduction and methodology

Charting unknown waters

Mapping the Animation Industry in Europe is a major research report commissioned to the European Audiovisual Observatory by the Creative Europe MEDIA sub-programme of the European Commission.

The project represents the first mapping of the animation industry at European level and is divided in two parts. The ***Focus on animation*** booklet (published in June 2015) tracks the production volume, distribution and circulation of European animation films and TV works, as well as at offering a general overview of the structure of the animation industry country by country and in Europe as a whole.

Building upon the figures presented in the Focus, this final report offers 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 the booklet: a qualitative study of the European animation industry; the key role of public funding; new trends in training; and festivals.

The European Audiovisual Observatory has conducted a survey on the structure and the production volume of European animation companies aiming at 8.500 companies and professionals in 29 European countries. The Observatory collected 1.000 answers. For the final report, the European Audiovisual Observatory has obtained more data by interviewing key players from the industry.

The lack of information for some indicators, along with the methodological diversity of the various sources in the several countries covered in this report, represented the main burdens to a more comprehensive analysis; this being especially true when it comes to structural figures.

Except for France, there is no national statistics on the animation industry. The recommendation from the European Audiovisual Observatory to the national agencies would be to work on annual analysis of their animation industry, following a common methodology to be defined and to which the European Audiovisual Observatory could contribute.

Methodology

This final report is supported by desk research, expert surveys in all European countries, selected deep-dive interviews with industry experts and valuable information collected through national institutes, Creative Europe Desks and animation associations across Europe.

For the production of both ***Mapping of the Animation Industry in Europe*** and ***Focus on Animation*** the following 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, Luxemburg, 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 provider separately.

When it comes to structural figures, the scope of coverage comprehends 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 make part of the calculation of global time series.

Country of origin: When it comes to film, it 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 one or several producers from one country will count as films produced in said country. Other films in which producers based in said country had a minority role in the production (minority co-producers) will not be counted as films produced in said country.

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

Production volume: Depending on the country, it 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 taken into account only new productions (see above). Only admissions generated in the year of analysis will be computed. That way, 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.

Note: 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.

1.Animation production and distribution in Europe

- 14.7% of European admissions go to animation films.
- European animation only gets 20% of the animation market in Europe.
- A yearly average of 50 animation films produced in Europe.
- Russia, the UK and France accounting for more than half of the yearly average admissions to animation in Europe between 2010 and 2014.
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- The proportion of European animation also strongly varies between European VOD paltforms. US (and sometimes Japan) are generally the first source of programming.

1.1 Film production / 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 to tell 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, as a 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.

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

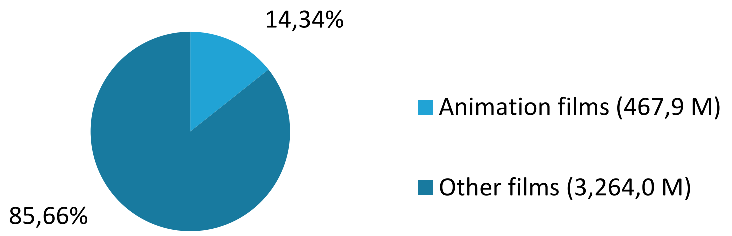
The US is, by far, the largest market for animation in the world. Between 2010 and 2014, feature animations did a yearly average of 173.9 million tickets, accounting for 14.2% of the total admissions in the country. Despite only accounting for 2.8% of the production volume of the country, domestic feature 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 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: Lentäjäveljekset*, where China represented 37.7% and 21.3% of their non-national admissions respectively.

1.1.1 World[1]

1 Animation market share 2014



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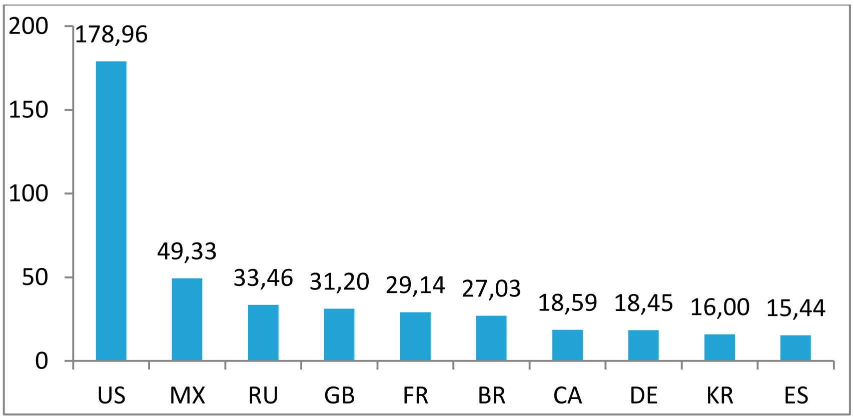
2 Top 10 markets by admissions to animation films ● 2010-2014 average, in millions[2]



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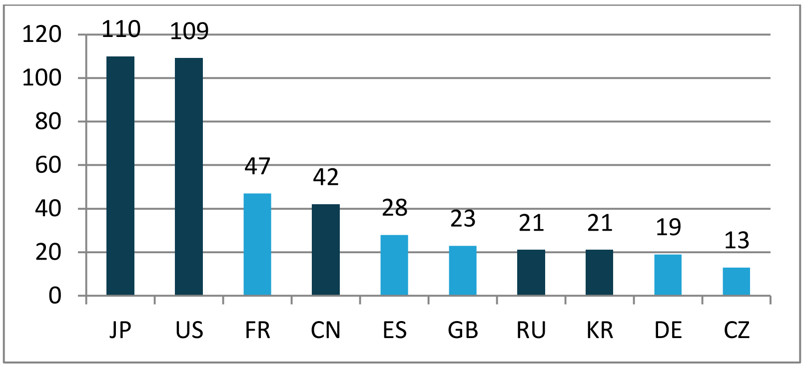
[1] This section includes the group of countries for which figures were available. Please refer to the methodology to have a comprehensive list of the countries covered.

[2] Not only new productions (as defined in the methodology) were taken into account to produce aggregates in this section, which may result in minor differences between the aggregates in each country presented here and those showed in the corresponding country pages.

3 *Top production countries by volume of animation[3] ● 2010-2014 average*



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4 *Top 20 animation films by admission worldwide ● 2010-2014*

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

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

[3] 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.

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.

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.

5 Top 20 animation films by admission worldwide excluding US productions ● 2010-2014

Rank	Title	Country of origin	Director	Admissions	Year of production
1	**Gnomeo and Juliet**	**GB INC / US**	**Kelly Asbury**	**22 534 924**	**2011**
2	**Happy Feet Two**	**AU**	**George Miller**	**16 970 992**	**2011**
3	**Arthur Christmas**	**GB INC / US**	**Sarah Smith, Barry Cook**	**16 924 523**	**2011**
4	The Nut Job	CA / KR / US	Peter Lepeniotis	14 743 528	2014
5	The Pirates! Band of Misfits	GB INC / US	Jeff Newitt, Peter Lord	12 825 654	2012
6	Paddington	GB / FR	Paul King	10 233 780	2014
7	Sammy's avonturen: De geheime doorgang	BE / US	Ben Stassen	8 394 503	2010
8	Las aventuras de Tadeo Jones	ES	Enrique Gato	7 223 114	2012
9	Sammy's avonturen 2	BE / FR / IT	Vincent Kesteloot, B. Stassen	6 362 328	2012
10	The House of Magic	BE	Jeremy Degruson, Ben Stassen	6 157 914	2013
11	Die Konferenz der Tiere	DE	Reinhard Klooss, Holger Tappe	5 753 407	2010
12	Tarzan	DE	Reinhard Klooss	5 187 388	2013
13	Kari-gurashi no Arietti	JP	Hiromasa Yonebayashi, Gary Rydstrom	4 776 519	2010
14	Metegol	AR / ES	Juan José Campanella	4 627 986	2013
15	Zambezia	ZA	Wayne Thornley	4 105 611	2012
16	Tri bogatyrya na dalnikh beregakh	RU	Konstantin Feoktistov	4 103 342	2012
17	Arthur et la guerre des deux mondes	FR	Luc Besson	4 094 984	2010
18	Don gato y su pandilla	MX / AR / GB	Alberto Mar	3 539 656	2011
19	Doragon bôru Z: Kami to kami	JP	Masahiro Hosoda	3 413 925	2013
20	How Not to Rescue a Princess	RU	Sergei Glezin	3 340 877	2010

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

1.1.2 Europe

European key figures

Europe				
Population 2014[e]	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			
Screens 2014 (digital screen penetration)	34 773	84,65%		
EU				
Population 2014[e]	507	million		
Gross box office 2014 all films	5 327,7	M EUR	7 067	M USD
Admissions 2014 all films	909	million		
Gross box office 2014 animation	754,3	M EUR	1 003,2	M USD
Admissions 2014 animation	128,7	million		
Average admissions 2010-2014 animation	142,1	million		
Screens 2014 (digital screen penetration)	29 395	85%		

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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, 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[4] 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.

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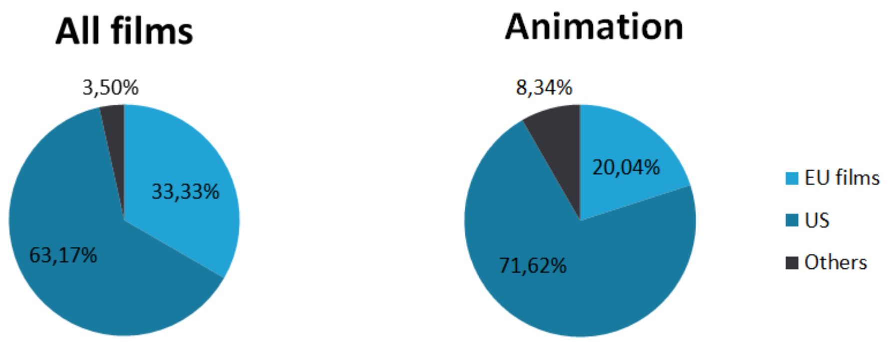
[4] The figure may increase as films produced in 2014 or before and released in 2015 could not be taken into account.

6 Market share of animation[5] in the EU by country of origin 2014



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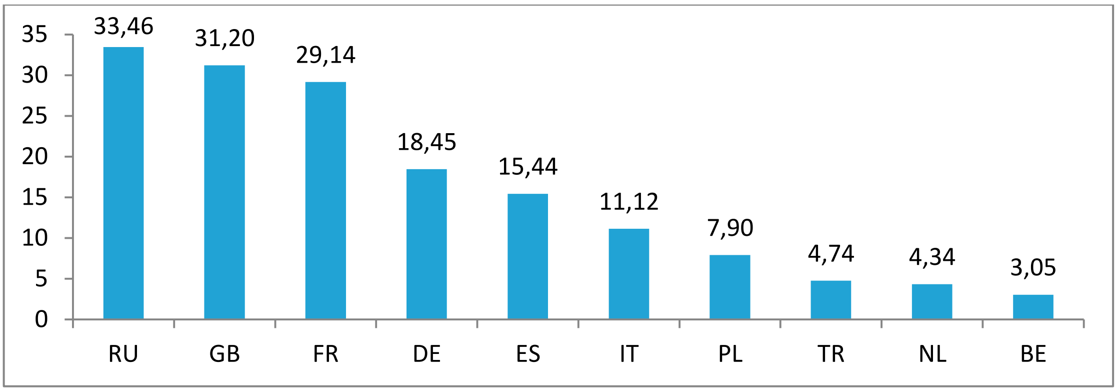
7 Top 10 European markets by admissions to animation films ● 2010-2014 average

In millions



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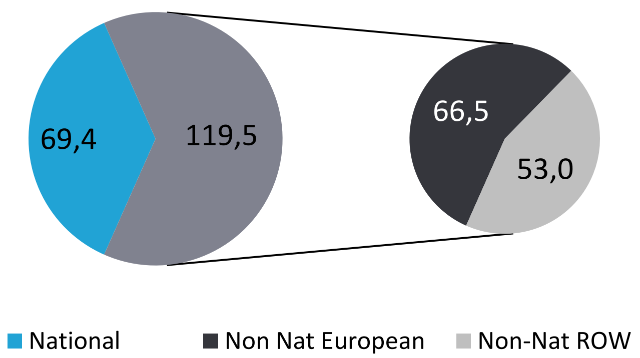
8 Admissions to European animation films by territory of release ● 2010-2014

In millions



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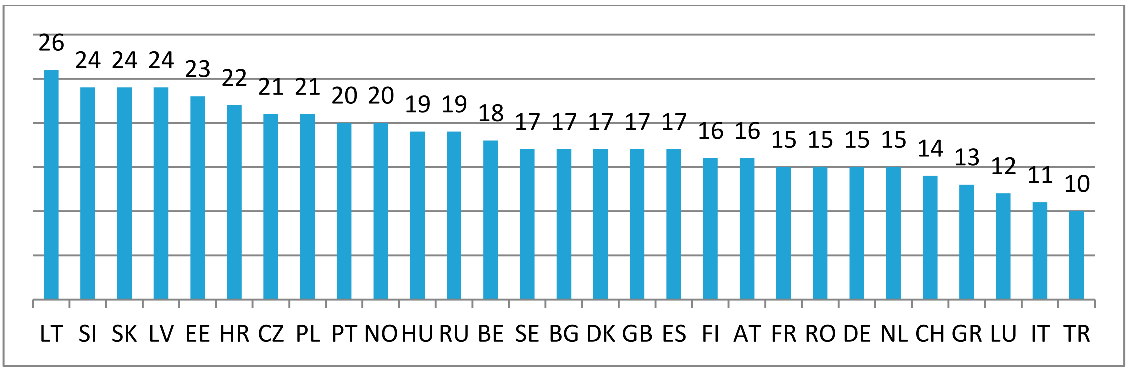
[5] New films (films produced up to 2 years before year of release).

9 European markets by share of admissions to animation films ● 2010-2014, in %



RENTRAX, OBS LUMIERE

10 Top 30 animation films in Europe by admissions ● 2010-2014

Rank	Title	Country	Director	Admissions	Year
1	Ice Age: Continental Drift	US	Steve Martino, Mike Thurmeier	42 845 050	2 012
2	Frozen	US	Chris Buck, Jennifer Lee	34 660 424	2 013
3	Shrek Forever After	US	Mike Mitchell	34 150 837	2 010
4	Despicable Me 2	US	Pierre Coffin, Chris Renaud	32 306 548	2 013
5	Madagascar 3: Europe's Most Wanted	US	Conrad Vernon, Tom McGrath, Eric Darnell	31 433 260	2 012
6	Toy Story 3	US	Lee Unkrich	29 982 852	2 010
7	Puss in Boots	US	Chris Miller	27 073 527	2 011
8	Tangled	US	Nathan Greno, Byron Howard	24 005 218	2 010
9	How to Train Your Dragon 2	US	Dean DeBlois	23 095 644	2 014
10	The Croods	US	Chris Sanders, Kirk De Micco	21 381 212	2 013
11	The Smurfs	US	Raja Gosnell	20 979 327	2 011
12	Kung Fu Panda 2	US	Jennifer Yuh	19 164 435	2 011
13	Rio 2	US	Carlos Saldanha	19 070 569	2 014
14	Cars 2	US	John Lasseter, Brad Lewis	18 918 442	2 011
15	Monsters University	US	Dan Scanlon	18 810 009	2 013
16	Brave	US	S. Purcell, M. Andrew, B.Chapman	18 473 506	2 012
17	The Smurfs 2	US	Raja Gosnell	17 840 564	2 013
18	The Adventures of Tintin	US / NZ	Steven Spielberg	17 651 829	2 011
19	Despicable Me	US	Pierre Coffin, Chris Renaud	17 510 827	2 010
20	How to Train Your Dragon	US	Dean DeBlois, Chris Sanders	16 368 857	2 010
21	Rio	US	Carlos Saldanha	15 732 399	2 011
22	Alvin and the Chipmunks: Chipwrecked	US	Mike Mitchell	14 789 019	2 011
23	Turbo	US	David Soren	13 267 737	2 013
24	The Lego Movie	US/AU/UK	Phil Lord, Christopher Miller	13 231 170	2 014
25	Wreck-It Ralph	US	Rich Moore	13 029 053	2 012
26	The Princess and the Frog	US	Ron Clements, John Musker	12 644 760	2 009
27	Hotel Transylvania	US	Genndy Tartakovsky	11 873 875	2 012
28	Penguins of Madagascar	US	Eric Darnell, Simon J. Smith	11 501 426	2 014
29	Rise of the Guardians	US	Peter Ramsey	11 110 416	2 012
30	Megamind	US	Tom McGrath	10 183 778	2 010

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11 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 doorgang	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 Degruson, Ben Stassen	4 791 192	2013
8	Tri bogatyrya na dalnikh 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	How Not to Rescue a Princess	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: Lentäjäveljekset	FI / DE / DK / IE	Kari Juusonen, Jørgen Lerdam	2 440 042	2012
18	Minuscule - La vallée des fourmis perdues	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, Rémi 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, Inna 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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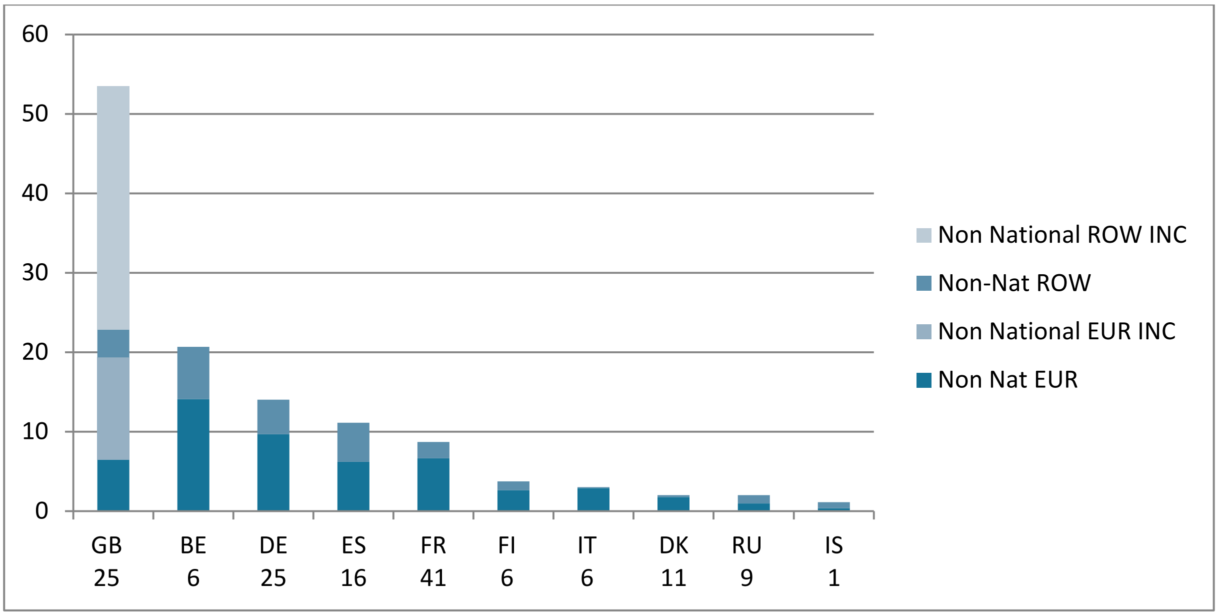
12 Top 10 European countries by admissions to animation abroad ● 2010-2014

In million admissions



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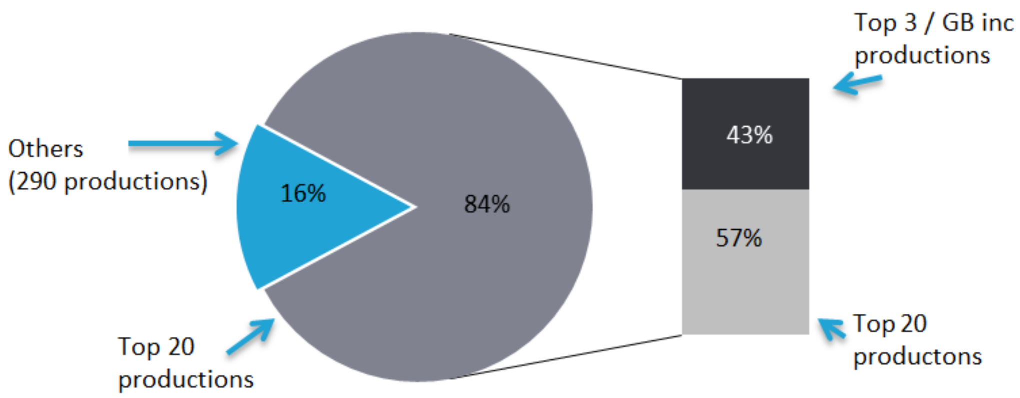
Note: The number of films released in non-national European and non-European territories is detailed for each country at the base of each column.

The areas in a lighter colour in the GB column represent admissions to GB inc productions in each category.

13 Non-national admissions structure ● 2010-2014



OBS LUMIERE

14 *Top 20 European films by admissions abroad ● 2010-2014*

Rank	Title	Country of origin	Director	Non-National admissions	Non national admissions as a share of total	Year of production
1	Gnomeo and Juliet	GB INC / US	Kelly Asbury	19 924 165	88%	2011
2	Arthur Christmas	GB INC / US	Sarah Smith, Barry 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 geheime doorgang	BE / US	Ben Stassen	8 158 331	97%	2010
5	Sammy's avonturen 2	BE / FR / IT	Vincent Kesteloot, Ben Stassen	6 240 152	98%	2012
6	Paddington	GB / FR	Paul King	6 221 135	61%	2014
7	The House of Magic	BE	Jeremy Degruson, Ben Stassen	6 112 603	99%	2013
8	Tarzan	DE	Reinhard Klooss	5 420 709	95%	2013
9	Las aventuras de Tadeo Jones	ES	Enrique Gato	4 477 980	62%	2012
10	Die Konferenz der Tiere	DE	Reinhard Klooss, Holger Tappe	4 324 496	74%	2010
11	Niko 2: Lentäjäveljekset	FI / DE / DK / IE	Kari Juusonen, Jørgen Lerdam	3 328 911	96%	2012
12	Planet 51	ES / GB	Javier Abad, Jorge Blanco	2 638 858	92%	2009
13	Justin and the Knights of Valour	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 fourmis perdues	FR / BE	Thomas Szabo, Hélène Giraud	2 118 226	59%	2013
16	Saving Santa	GB / US	Aaron Seelman, Leon 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 Maltazard	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	Boris Aljinovic, Harald Siepermann	1 124 356	73%	2014

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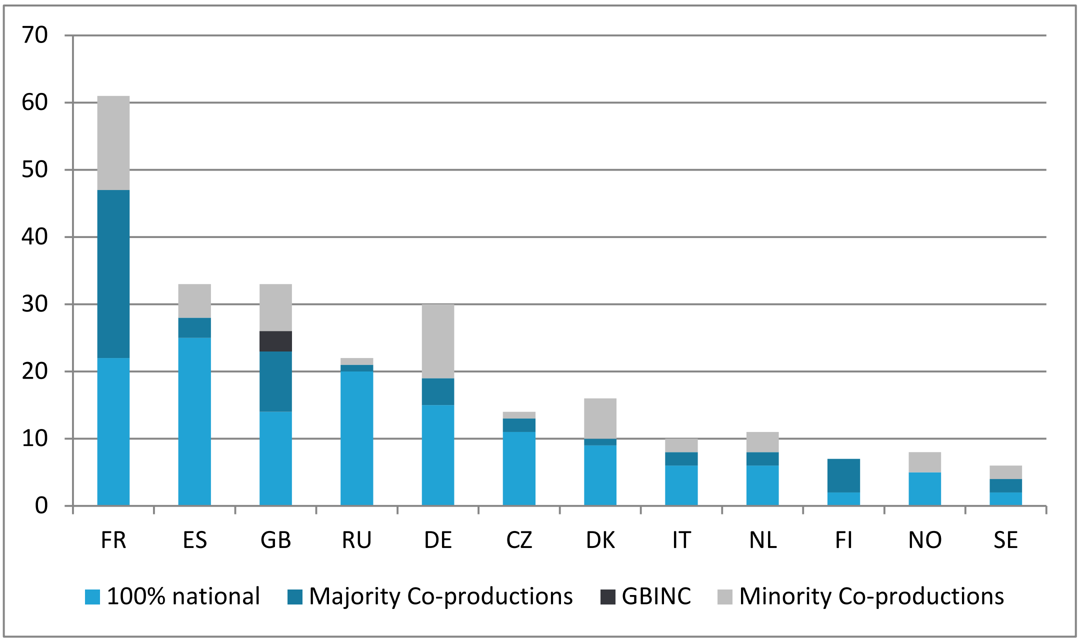
15 European countries by production volume of animation films • 2010-2014



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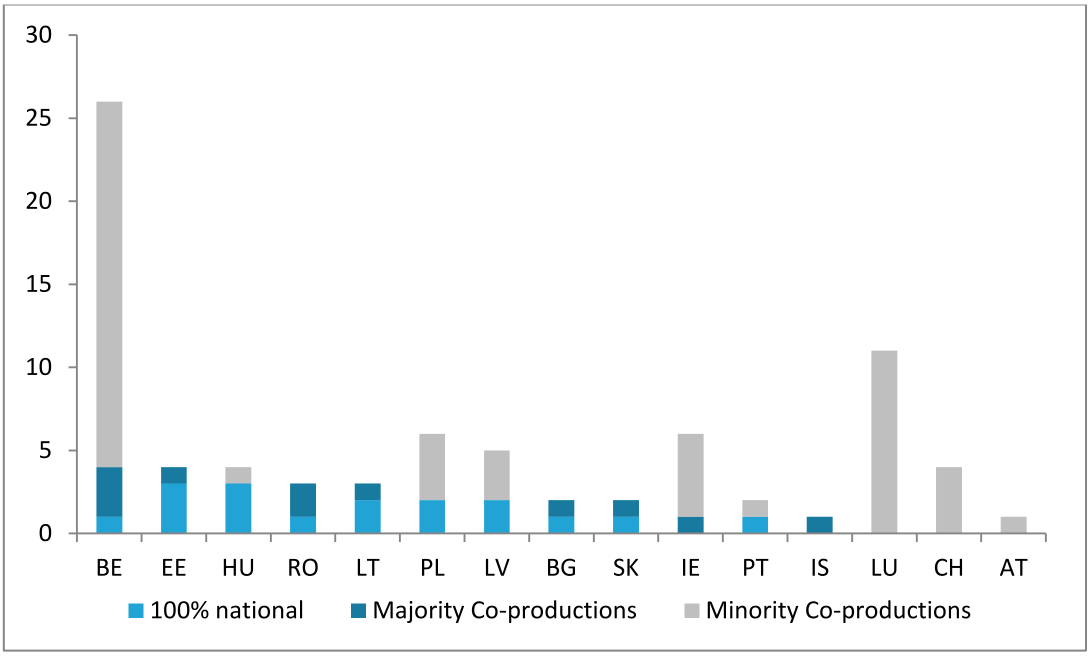
16 European countries by production volume of animation films (continued) • 2010-2014



RENTRAK, OBS LUMIERE

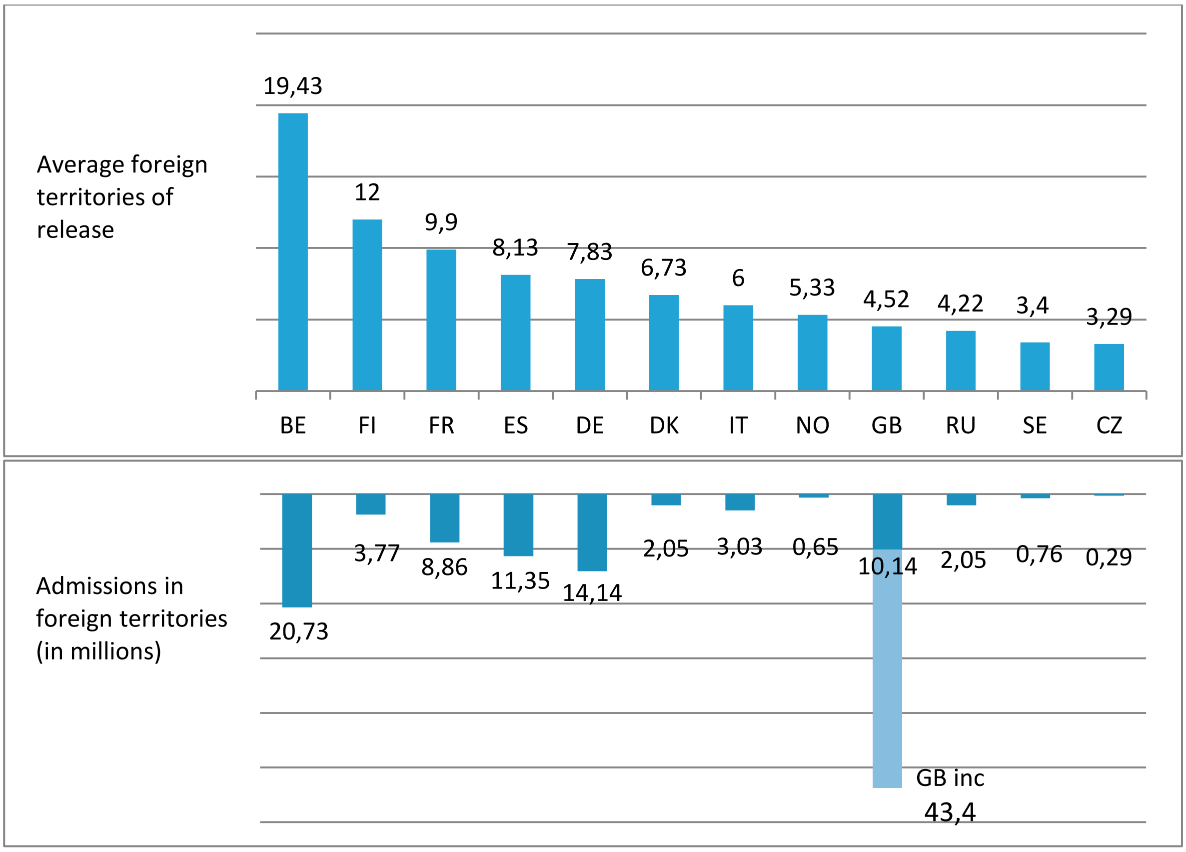
17 Top 20 European animation films by number of distribution territories ● 2010-2014

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 doorgang	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	Jeremy Degruson, Ben Stassen	33	6 112 603	2013
6	Sammy's avonturen 2	BE / FR / IT	Vincent Kesteloot, Ben 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 Maltazard	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 perdues	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: Lentäjäveljekset	FI / DE / DK / IE	Kari Juusonen, Jørgen Lerdam	23	3 328 911	2012
15	Arthur et la guerre des deux mondes	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	Jean-Christophe Lie, Rémi 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[6]	FR	Louis Clichy, Alexandre Astier	7	595 852	2014

OBS LUMIERE

[6] Film still grossing in 2015.

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



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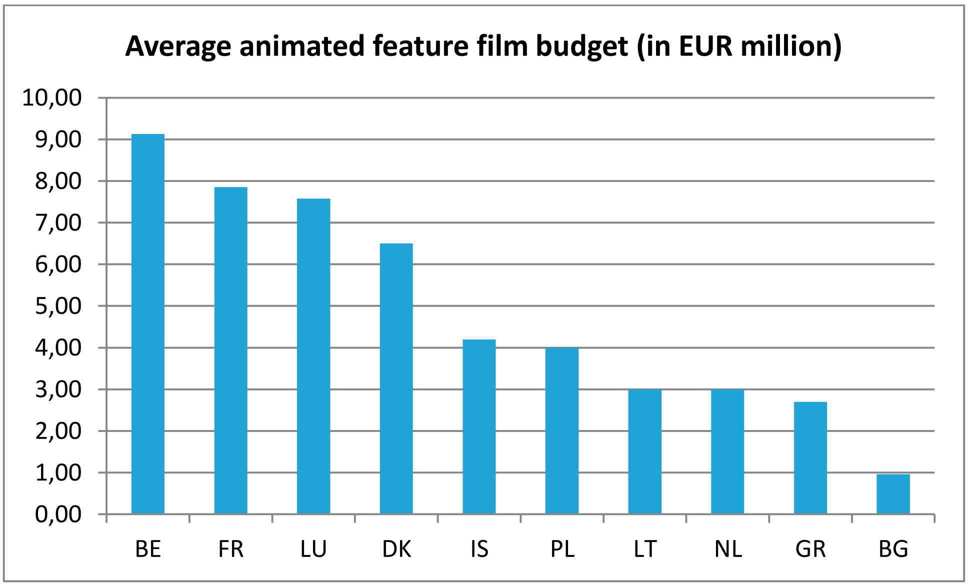
19 Average animated feature film budget (in EUR million)



Source: OBS

From the five more expensive countries to produce an animated feature, only France is one of the big five European territories, the four others being usually minority co-producers. Belgium and Luxembourg that close the podium with France are equally its most usual co-producers.

1.1.3 France

Key country figures

Population 2014[e]	**65,8**	**million**		
GDP / capita 2014[e]	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)	5653 (100%)			

CNC, CSA, OBS MAVISE

Admissions to animation films in France counted for 25,9m, 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, admission to French animations in the World in 2013 (2,2m) had decreased 61% compared to the average 5,6m admissions in the period 2010-2014, and now 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 13th position. The film, produced in 2010, has accumulated over 4m admissions, 75% of them in France.

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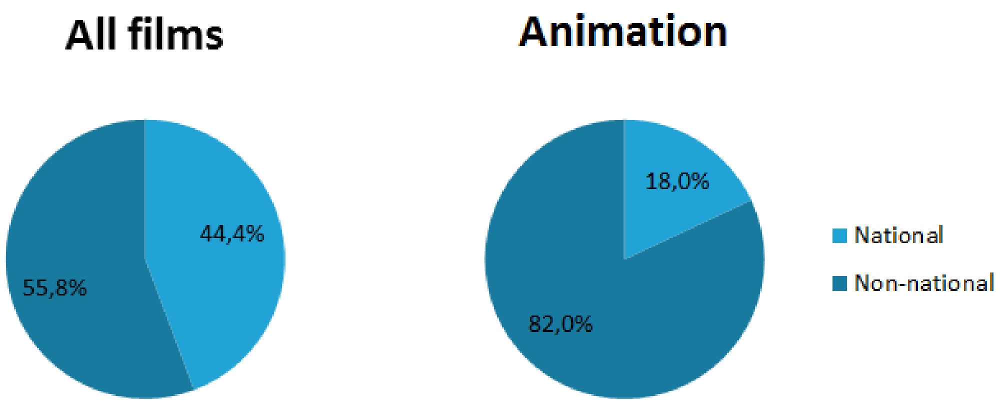
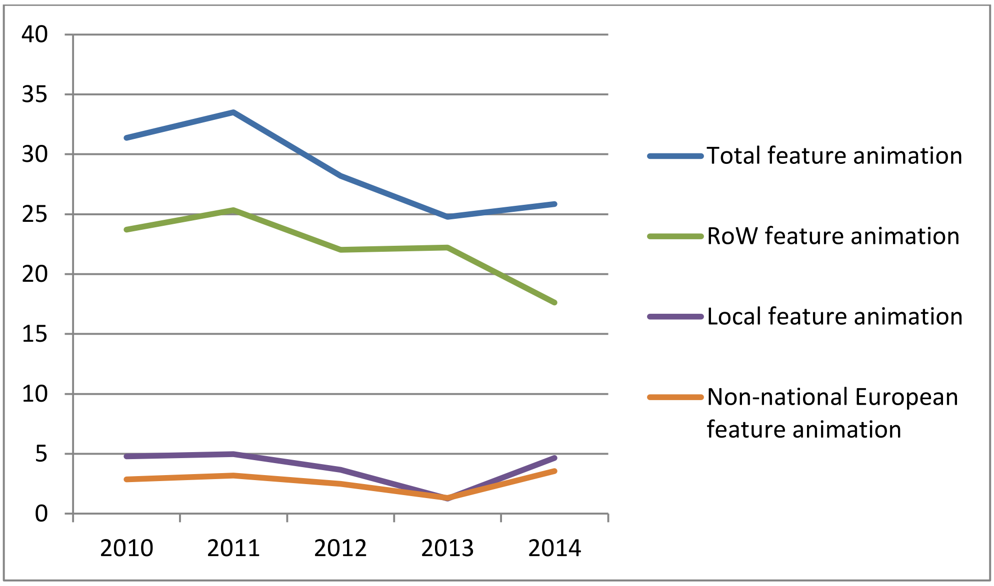
20 Market shares 2014



CNC, CSA, OBS LUMIERE

21 Admissions to animation films in France by country of production ● 2010-2014[7]

In millions

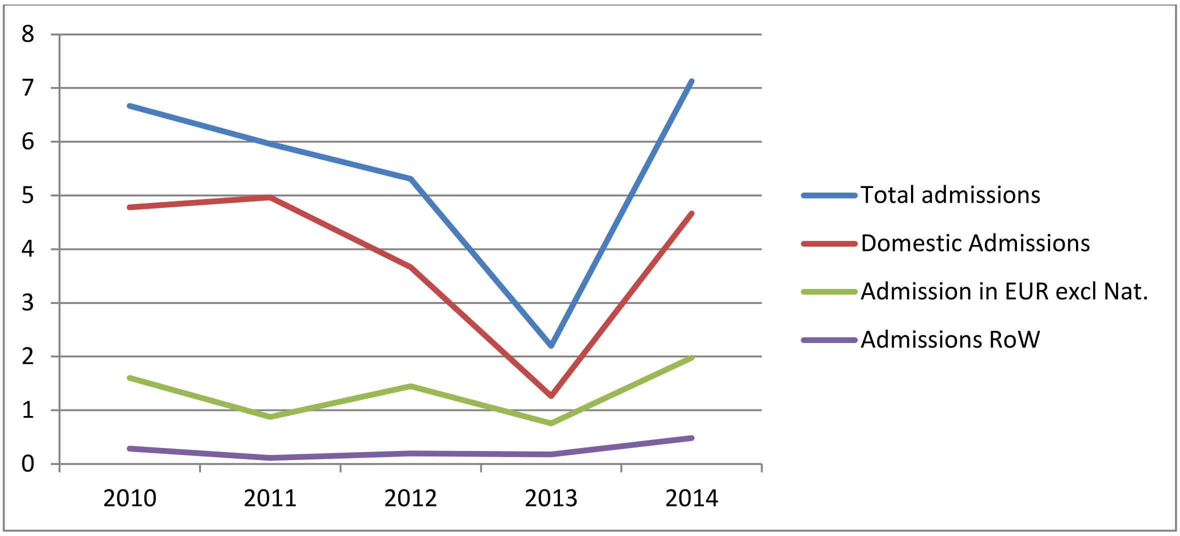


CNC, OBS LUMIERE

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

22 Admissions to French animation films by release market ● 2010-2014

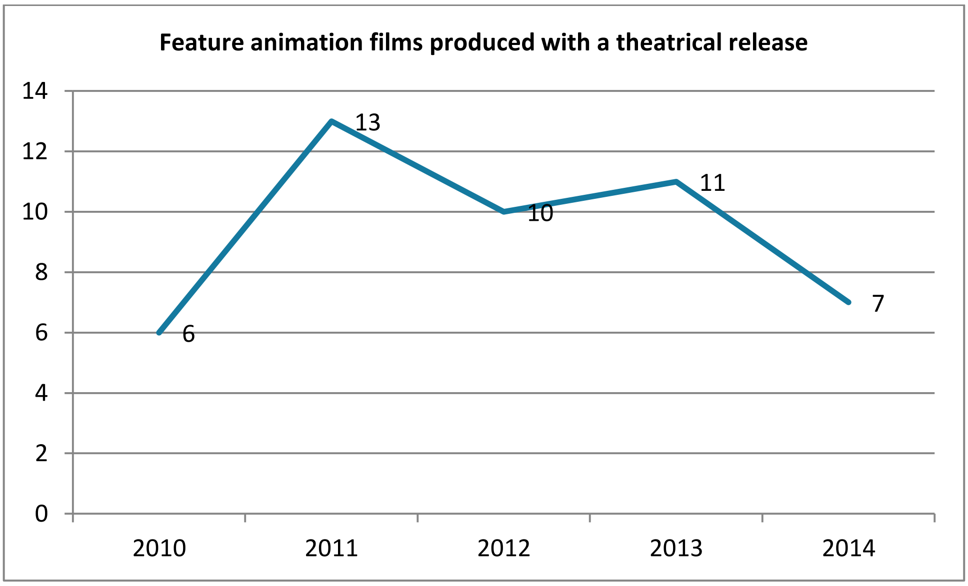
In millions



CNC, OBS LUMIERE

23 Production volume ● 2010-2014

In number of films



CNC, OBS LUMIERE

24 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	Steve Martino, Mike Thurmeier	20th Century Fox (FR)	6 625 903	2012
2	The Adventures of Tintin	US / NZ	Steven Spielberg	Sony Pictures Releasing (FR)	5 308 461	2011
3	Despicable Me 2	US	Pierre Coffin, Chris Renaud	Universal Pictures	4 655 036	2013
4	Shrek Forever After	US	Mike Mitchell	Paramount Pictures (FR)	4 625 118	2010
5	Toy Story 3	US	Lee Unkrich	Walt Disney Studios (FR)	4 353 253	2010
6	Puss in Boots	US	Chris Miller	Paramount Pictures (FR)	3 858 651	2011
7	The Princess and the Frog	US	Ron Clements, John Musker	Walt Disney Studios (FR)	3 842 600	2009
8	Tangled	US	Nathan Greno, Byron Howard	Walt Disney Studios (FR)	3 550 281	2010
9	Madagascar 3: Europe's Most Wanted	US	C. Vernon, T. McGrath, E. Darnell	Paramount Pictures (FR)	3 412 055	2012
10	How to Train Your Dragon 2	US	Dean DeBlois	20th Century Fox (FR)	3 375 600	2014

25 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 des deux mondes	FR	Luc Besson	EuropaCorp	3 131 880	2010
2	Astérix: Le domaine des dieux[8]	FR	Louis Clichy, Alexandre 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 fourmis perdues	FR / BE	Thomas Szabo, Hélène Giraud	Le Pacte	1 499 488	2013
5	Zarafa	FR / BE	Jean-Christophe Lie, Rémi Bezançon	Pathé Distribution	1 442 094	2012
6	Titeuf, le film	FR	Zep	Pathé Distribution	1 267 524	2011
7	Kirikou et les hommes et les femmes	FR	Michel Ocelot	StudioCanal(FR)	1 078 859	2012
8	L'apprenti Père Noël	FR / AU	Luc Vinciguerra	Gaumont Distribution	605 032	2010
9	Arthur et la vengeance de Maltazard	FR	Luc Besson	EuropaCorp	570 800	2009
10	Jack et la mécanique du coeur	FR / BE	S. Berla, M. Malzieu, Stéphane Berla	EuropaCorp	562 347	2013

OBS LUMIERE

[8] Film still grossing in 2015.

1.1.4 Germany

Key country figures

Population 2014[e]	**80,8**	**million**		
GDP / capita 2014[e]	47 201	USD		
Film landscape 2014				
Gross box office 2014 all films	962,3	M EUR	1 279,20	M USD
Admissions 2014 all films	119,5	million		
Gross box office 2014 animation	115,5	M EUR	153,56	M USD
Admissions 2014 animation	15,6	million		
Average 2010-2014	18,3	million		
Screens 2014 (digital screen penetration)	4 637 (90%)			

FFA, ARD JAHRBUCH, OBS LUMIERE

Germany ranks third in the European Union in terms of global GBO (€979m) and admissions (121,7m). In 2014, admissions to animation features rose to 14,4m, an increase of 5,7% compared to the average for the 5 year period 2010-2014. Admissions to animation films represent 12% of all theatrical tickets, and the market share of German animation in Germany is of 13,6%.

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 films 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 dip 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 29% for admissions (up to 14,6m). The increase of other European non-national admissions in Germany in 2012 is due to the success of GB Inc/ US co-production *The Pirates! Band of Misfits* (2012).

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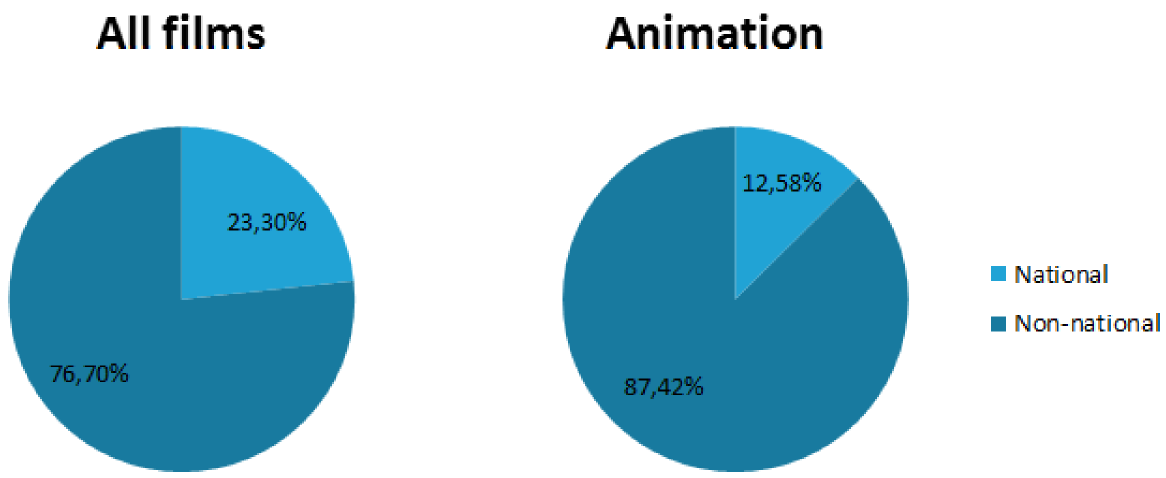
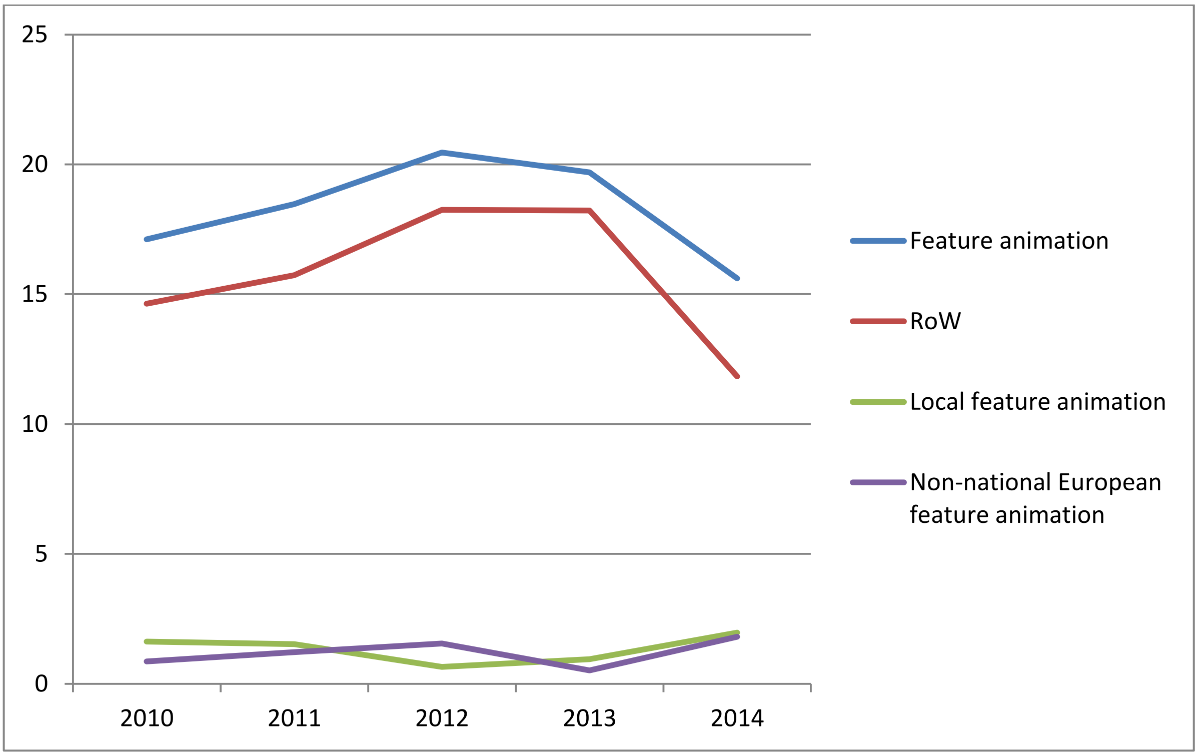
26 Market shares 2014



FFA, ARD JAHRBUCH, OBS LUMIERE

27 Admissions to animation films in Germany by country of production ● 2010-2014[9]

In millions

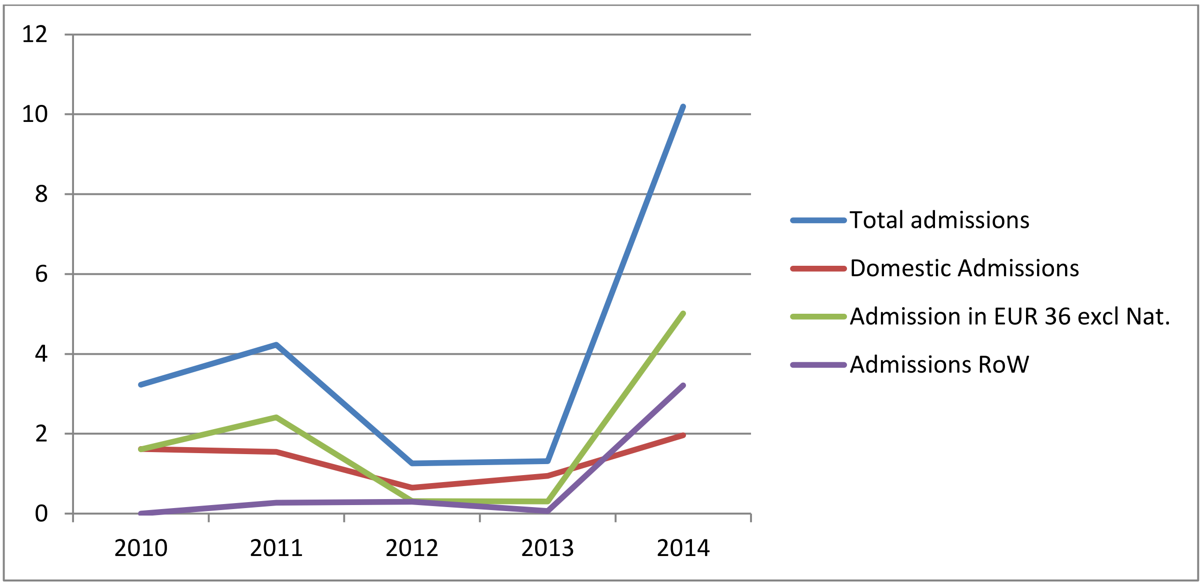


ROVI INTERNATIONAL SOLUTIONS, OBS LUMIERE, OBS MAVISE

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

28 Admissions to animation films in Germany by country of production ● 2010-2014[10]

In millions



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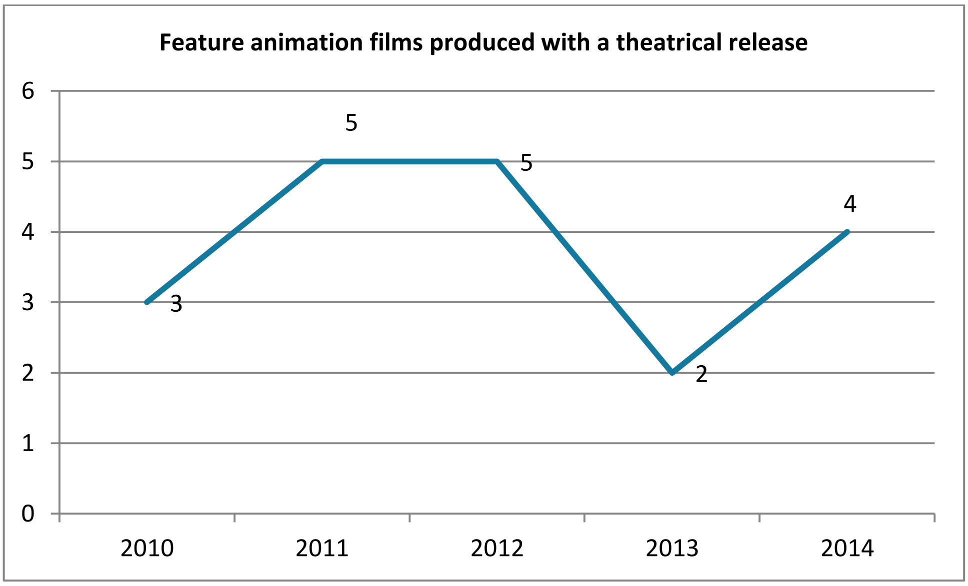
29 Production volume ● 2010-2014[11]

In number of films



OBS LUMIERE

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

[11] 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.

30 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	Steve Martino, Mike Thurmeier	20th Century Fox (DE)	6 694 620	2012
2	Frozen	US	Chris Buck, Jennifer Lee	Walt Disney Studios (DE)	4 758 768	2013
3	Madagascar 3: Europe's Most Wanted	US	Conrad Vernon, Tom McGrath, Eric Darnell	Paramount (DE)	3 956 925	2012
4	Tangled	US	Nathan Greno, Byron Howard	Walt Disney Studios (DE)	3 931 585	2010
5	Despicable Me 2	US	Pierre Coffin, Chris 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 Releasing (DE)	2 701 742	2011
9	Despicable Me	US	Pierre Coffin, Chris Renaud	Universal Pictures (DE)	2 513 345	2010
10	The Smurfs 2	US	Raja Gosnell	Sony Pictures Releasing (DE)	2 513 159	2013

OBS LUMIERE

31 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	Reinhard Klooss, Holger 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 das kleine Einhorn	DE / FR	Ansgar Niebuhr, Hubert Weiland	Universum Film	626 097	2011
4	Ritter Rost - Eisenhart und voll verbeult	DE	Thomas Bodenstein, Hubert Weiland, Nina Wels	Universum Film	610 215	2012
5	Der kleine Rabe Socke	DE	Ute von Münchow-Pohl, Sandor Jesse	Universum Film	486 481	2012
6	Werner - Eiskalt!	DE	Gernot Roll	Constantin Film (DE)	438 056	2011
7	Der 7bte Zwerg	DE	Boris Aljinovic, Harald Siepermann	Universal Pictures (DE)	412 286	2014
8	Lauras Stern und die Traummonster	DE	Thilo Rothkirch, Ute von Münchow-Pohl	Warner Bros. (DE)	373 807	2011
9	Der kleine Drache Kokosnuss[12]	DE	Hubert Weiland, Nina Wels	Universum Film	349 687	2014
10	Keinohrhase und Zweiohrküken	DE	Til Schweiger, Maya Gräfin Rothkirch	Warner Bros. (DE)	307 534	2013

OBS LUMIERE

[12] Film still grossing in 2015.

1.1.5 Italy

Key country figures

Population 2014[e]	**60,8**	**million**		
GDP / capita 2014[e]	35 512	USD		
Film landscape 2014				
Gross box office 2014 all films	*551,8*	M EUR	733,46	M USD
Admissions 2014 all films	91,2	million		
Gross box office 2014 animation	*72,42*	M EUR	96,27	M USD
Admissions 2014 animation	11,97	million		
Average 2010-2014	10,94	million		
Screens 2014 (digital screen penetration)	2850 (76%)			

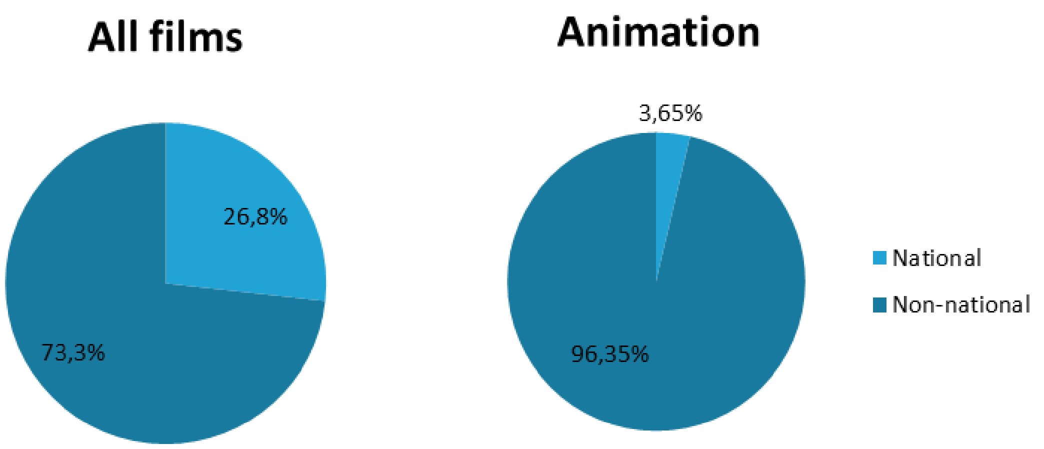
MIBACT, OBS LUMIERE

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 (11m). But local animation had low results, with an average market share in 2010-2014 of less than 3% of admissions (3,9% 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 organised by Disney Junior in October 2014 made almost 55.000 admissions.

MIBACT, OBS LUMIERE

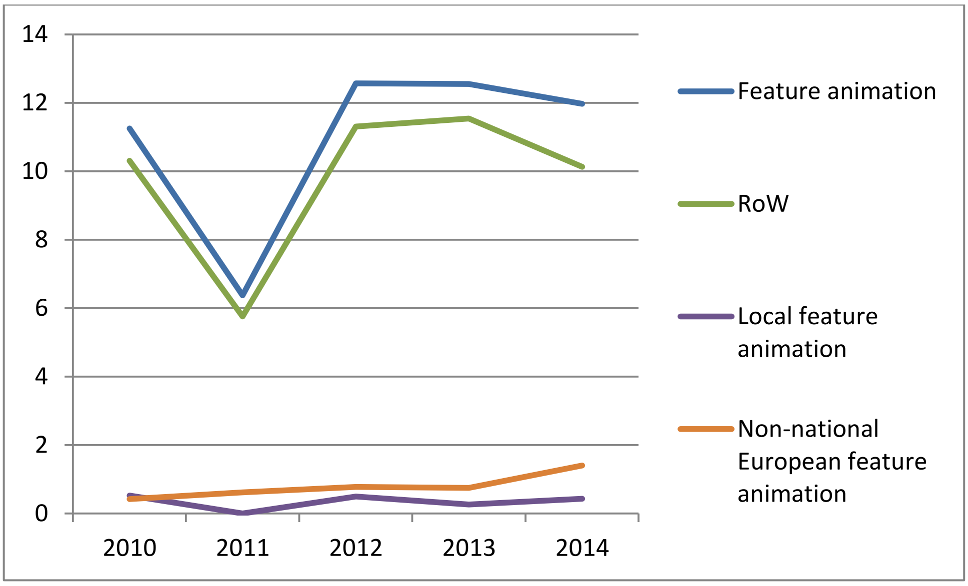
32 Market shares 2014



MIBACT, OBS LUMIERE

33 Admissions to animation films in Italy by country of production ● 2010-2014

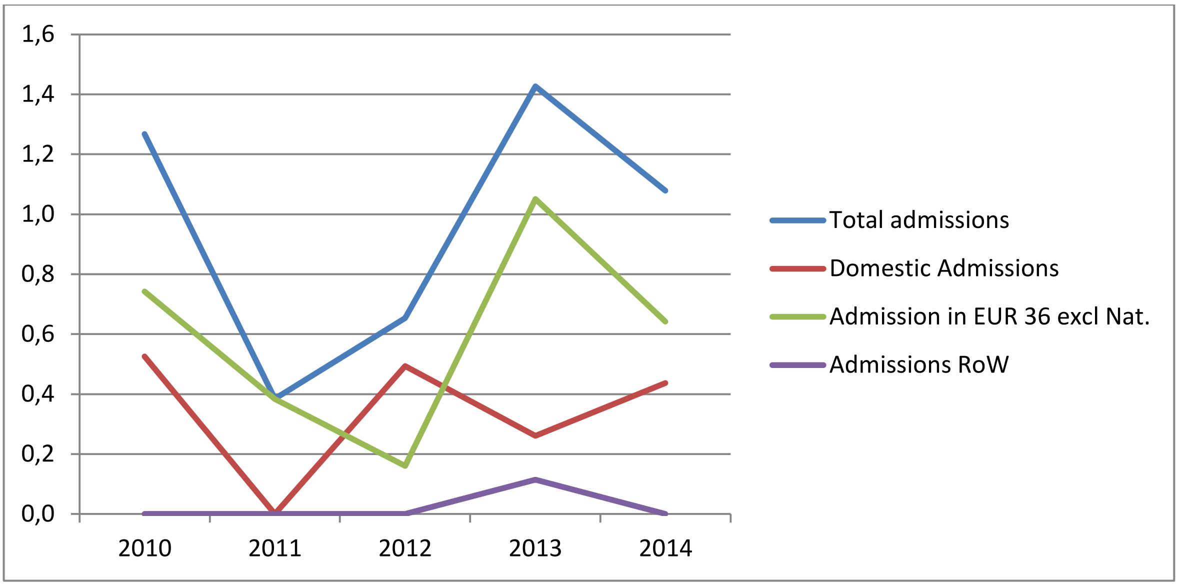
In millions



DG CINEMA-MIBACT, OBS LUMIERE

34 Admissions to Italian animation films by release markets ● 2010-2014

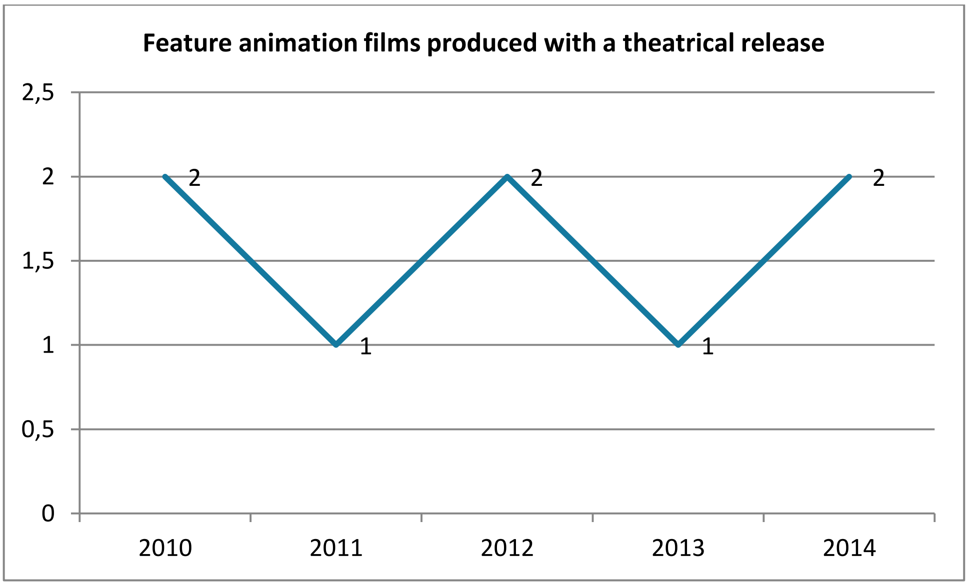
In millions



DG CINEMA-MIBACT, OBS LUMIERE

35 Production volume ● 2010-2014

In number of films



DG CINEMA-MIBACT, OBS LUMIERE

36 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 Most Wanted	US	Conrad Vernon, Tom McGrath, Eric Darnell	Universal (IT)	3 044 609	2012
2	Frozen	US	Chris Buck, Jennifer Lee	Walt Disney (IT)	2 916 915	2013
3	Despicable Me 2	US	Pierre Coffin, Chris Renaud	Universal (IT)	2 401 598	2013
4	Ice Age: Continental Drift	US	Steve Martino, Mike 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	Chris Sanders, Kirk 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	Pierre Coffin, Chris Renaud	Universal (IT)	1 543 807	2010
9	Monsters University	US	Dan Scanlon	Walt Disney (IT)	1 423 342	2013
10	Tangled	US	Nathan Greno, Byron Howard	Walt Disney (IT)	1 349 722	2010

OBS LUMIERE

37 Top 8 Italian animation films by admissions in Italy ● 2010-2014

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	Sergio Manfio, Francesco Manfio	01 Distribution	122 850	2010
6	Cuccioli - Il paese del vento	IT	Sergio Manfio	01 Distribution	52 503	2014
7	L'arte della felicità	IT	Alessandro Rak	Istituto Luce Cinecittà	41 737	2013
8	Tormenti - Film disegnato	IT	Filiberto Scarpelli	Lucky Red	218	2011

OBS LUMIERE

1.1.6 Spain

Key country figures

Population 2014[e]	**46,5**	**million**		
GDP / capita 2014[e]	30 113	USD		
Film landscape 2014				
Gross box office 2014 all films	522,5	M EUR	694,93	M USD
Admissions 2014 all films	87,4	million		
Gross box office2014 animation	72,16	M EUR	95,97	M USD
Admissions 2014 animation	12,07	million		
Average admissions animation 2010-2014	15,23	million		
Screens 2014 (digital screen penetration)	2 803 (76%)			

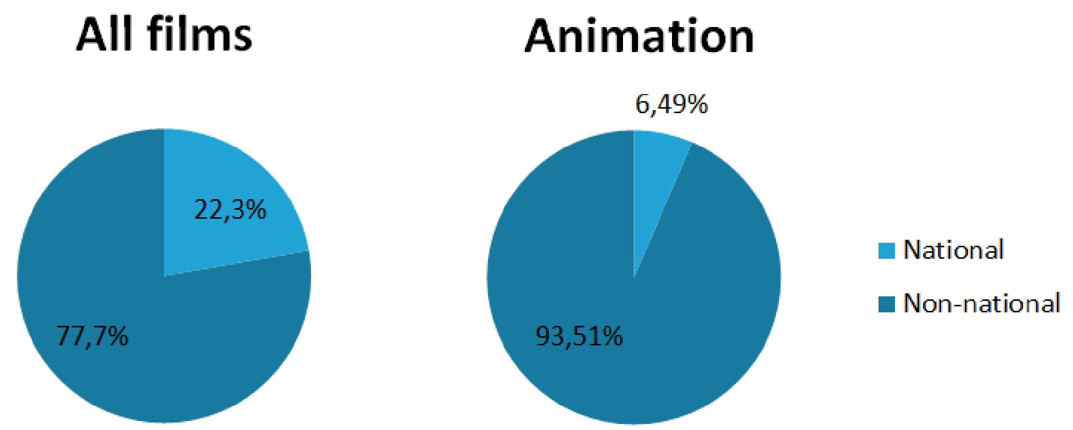
ICAA, OBS LUMIERE

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 features 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. 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 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 productions. 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).

ICAA, OBS LUMIERE

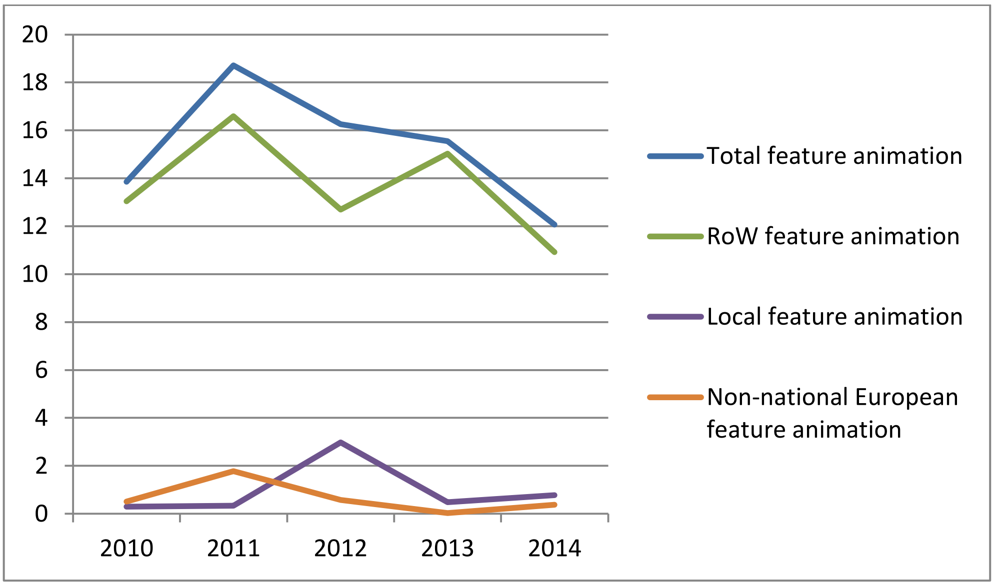
38 Market shares 2014



ICAA, IHS, OBS LUMIERE

39 Admissions to animation films in Spain by country of production ● 2010-2014[13]

In millions

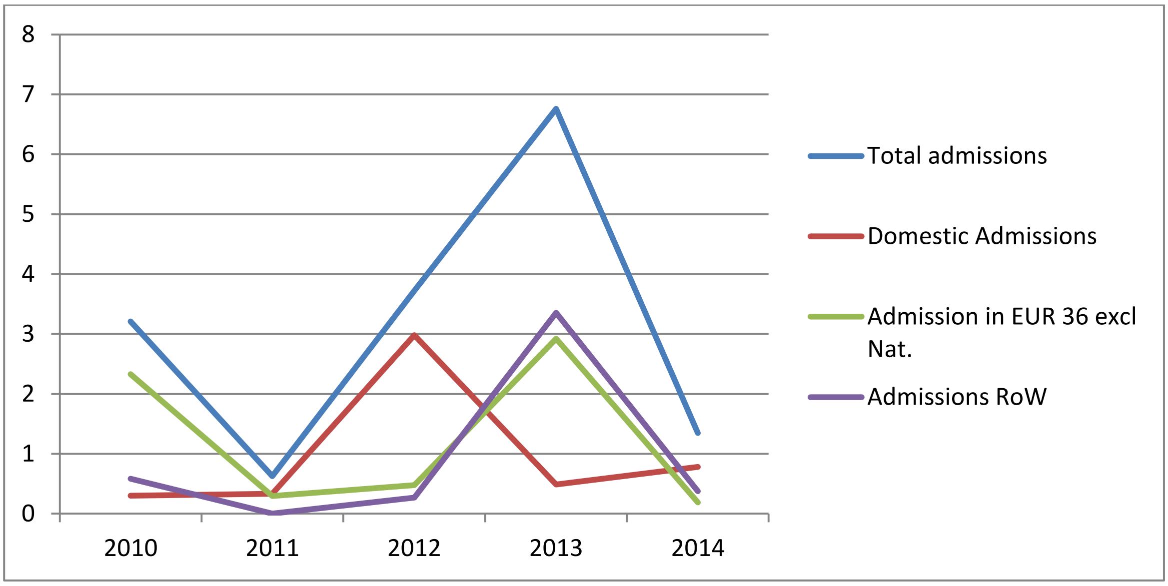


ICAA, OBS LUMIERE

[13] It only includes new productions (films producesd up to two years befor the release year).

40 Admissions to Spanish animation by release markets ● 2010-2014[14]

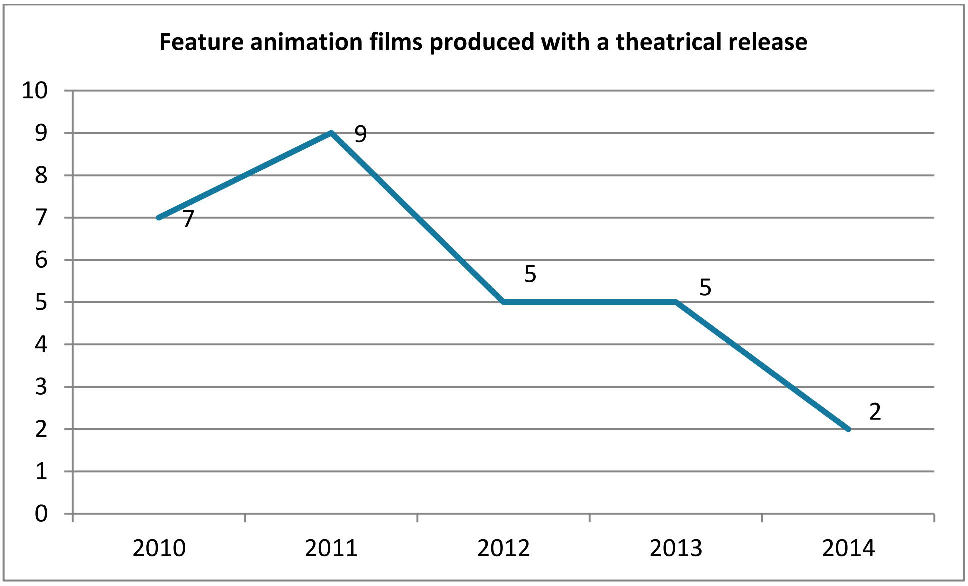
In millions



ICAA, OBS LUMIERE

41 Production volume ● 2010-2014

In number of films



ICAA, OBS LUMIERE

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

42 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 Co. Iberia	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 Co. Iberia	2 712 226	2013
4	The Adventures of Tintin	US / NZ	Steven Spielberg	Sony Pictures Releasing Espana	2 478 457	2011
5	Puss in Boots	US	Chris Miller	Paramount Spain	2 460 266	2011
6	Ice Age: Continental Drift	US	Steve Martino, Mike Thurmeier	Hispano Foxfilms	2 426 221	2012
7	Brave	US	S. Purcell, M. Andrew, B. Chapman	The Walt Disney Co. Iberia	2 381 328	2012
8	Shrek ForeverAfter	US	Mike Mitchell	Paramount Spain	2 321 716	2010
9	Despicable Me 2	US	Pierre Coffin, Chris Renaud	Universal Pictures International Spain	2 190 423	2013
10	The Smurfs	US	Raja Gosnell	Sony Pictures Releasing Espana	2 147 288	2011

43 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 c. Jimmy el Cachondo[15]	ES	Javier Fesser	Warner Bros. Ent. Espana	694 256	2014
3	Justin and the Knights of Valour	ES	Manuel Sicilia	Sony Pictures Releasing Espana	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	Javier Mariscal, Fernando Trueba	The Walt Disney Co. Iberia	156 532	2010
7	El tesoro del rey midas	ES	Maite Ruiz de Austri	Extra Extremadura de Audiovisuales	69 514	2010
8	El extraordinario viaje de Lucius Dumb	ES	Maite Ruiz de Austri	Barton Films	47 126	2013
9	La tropa de trapo en el pais donde brilla el sol	ES	Alex Colls	Alta Classics	41 756	2010
10	Olentzero eta Iratxoen Jauntxoa	ES	Gorka Vázquez	Barton Films	30 409	2011

OBS LUMIERE

[15] Film still grossing in 2015.

1.1.7 United Kingdom

Key country figures

Population 2014[e]	**64,3**	**million**		
GDP / capita 2014[e]	44 141	USD		
TV landscape 2014				
Gross box office 2014 all films	1 125,1	M GBP	1 846,33	M USD
Admissions 2014 all films	167,5	million		
Gross box office2014 animation	186,61	M GBP	306,23	M USD
Admissions 2014 animation	27,78	million		
Average 2010-2014	30,5	million		
Screens 2014 (digital screen penetration)	3 909 (99%)			

BFI, OFCOM, OBS LUMIERE

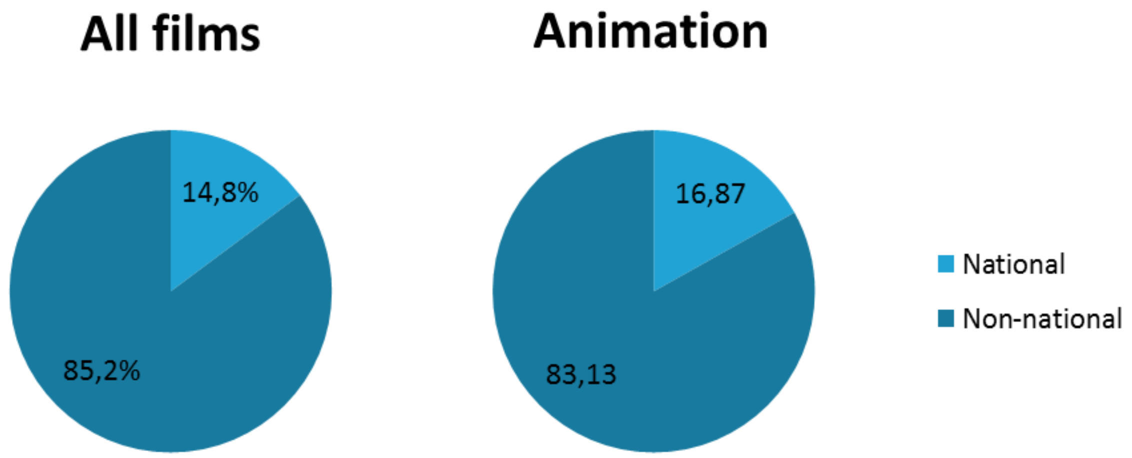
UK & Ireland[16] is the largest market for animation in the EU with average 30.5 million admissions between 2010 and 2014 - 27.8 million admissions in 2014, representing 16.6% of the total theatrical attendance. The concentration of admissions to animation films at the top (the 10 highest grossing animation films achieved 35% of the admissions to animation in the territory) was slightly higher than in overall terms. However, when it comes to local animation, the figures exploded, with the top four titles (three of them GBinc 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 animations over the last five years.

BFI, OBS LUMIERE

[16] Data on admissions to individual films aggregate admissions from the UK and the Republic of Ireland.

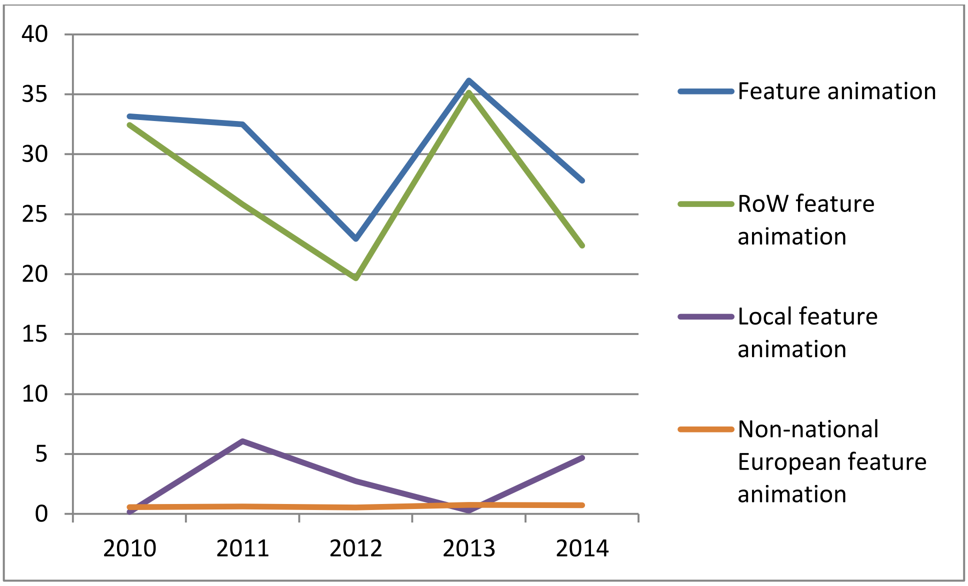
44 Market shares 2014



BFI, OFCOM, OBS LUMIERE

45 Admissions to animation films in United Kingdom by country of production ● 2010-2014[17]

In millions

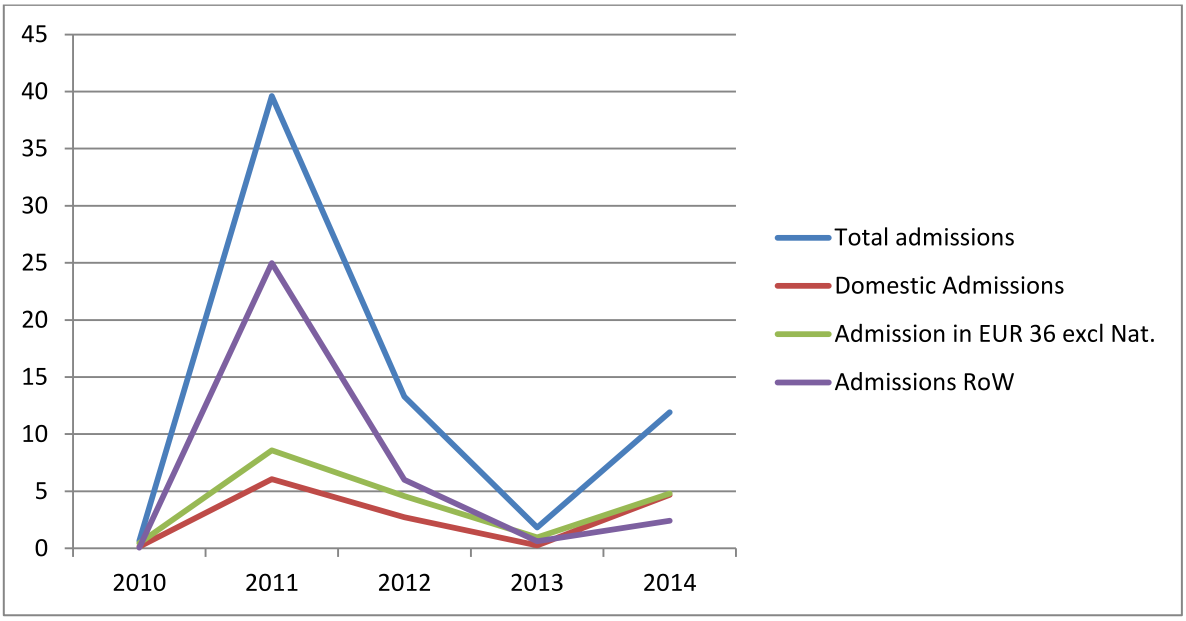


BFI, OBS LUMIERE

[17] It only includes new productions (films producesd up to two years befor the release year).

46 Admissions to UK animation films by release market ● 2010-2014[18]

In millions

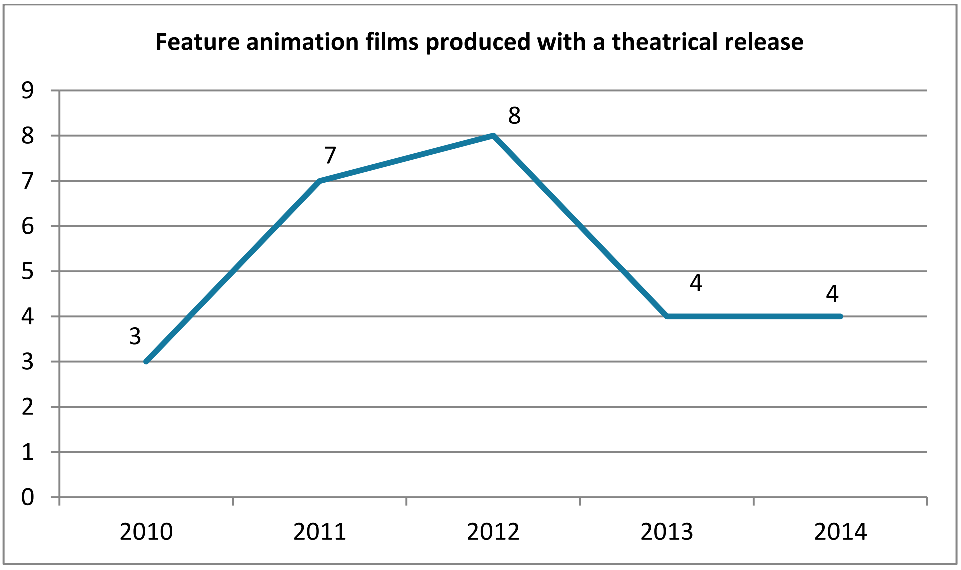


BFI, OBS LUMIERE

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

47 Production volume ● 2010-2014

In number of films



BFI, OBS LUMIERE

[18] It only includes new productions (films producesd up to two years befor the release year).

48 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	Pierre Coffin, Chris 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 (UK)	5 545 096	2010
5	The Lego Movie	US / AU / DK	Phil Lord, Christopher Miller	Warner Bros. (GB)	5 049 754	2014
6	Ice Age: Continental Drift	US	Steve Martino, Mike 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	Chris Sanders, Kirk De Micco	20th Century Fox (GB)	4 098 939	2013
9	Paddington[19]	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

OBS LUMIERE

49 Top 10 UK animation films by admissions in the United Kingdom ● 2010-2014

Rank	Title	Country of origin	Director	Distributor	Admissions	Year of production
1	Paddington[20]	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	Wip Vernooij, Morgan Francis	Universal Pictures (GB)	348 485	2013
7	L'illusioniste	GB / FR	Sylvain Chomet	Pathé Distribution (UK)	156 758	2009
8	Thomas & Friends: King Of The Railway	GB	Rob Silvestri	Hit Entertainment	21 376	2013
9	Thomas & Friends: Tale Of The Brave	GB	Rob Silvestri	Hit Entertainment	18 826	2014
10	Thomas & Friends: Blue Mountain Mystery	GB	Greg Tiernan	Hit Entertainment	17 943	2012

OBS LUMIERE

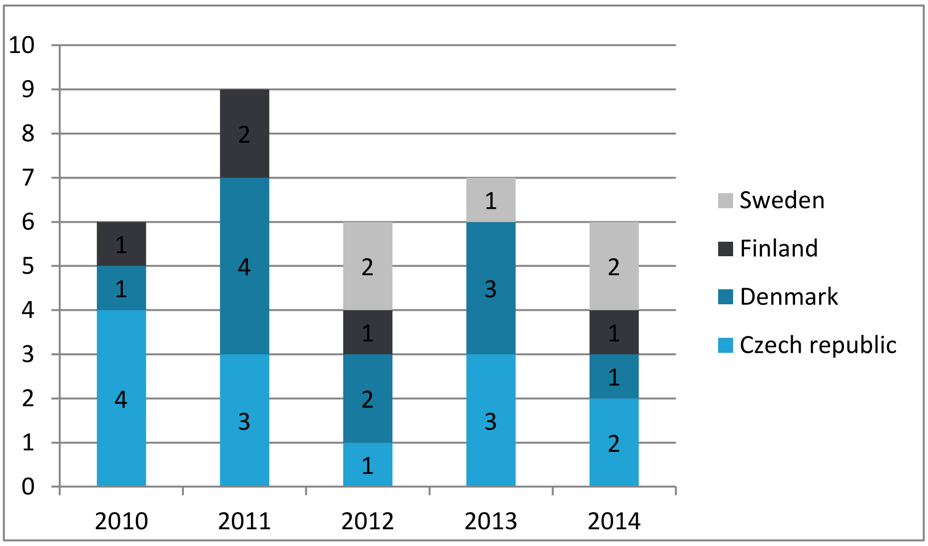
[19] Film still grossing in 2015.

[20] Film still grossing in 2015.

1.1.8 Other European countries

50 Feature animation films produced with a theatrical release ● 2010-2014

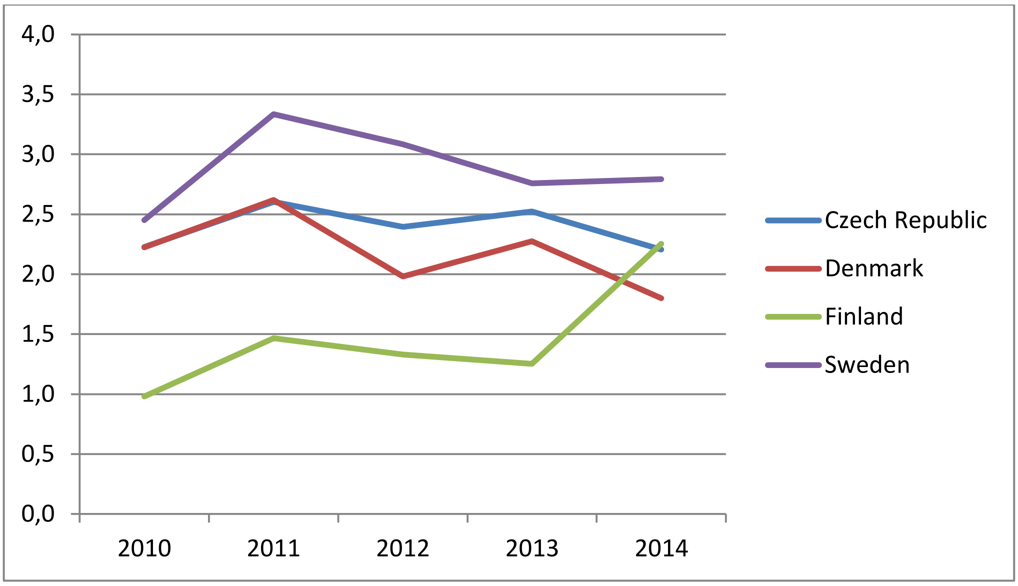
In number of films



OBS LUMIERE

51 Admissions to animation films by country ● 2010-2014[21]

In millions admissions



OBS LUMIERE

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

52 Top 10 Czech animation films by admissions in the world ● 2010-2014

Rank	Film	Country of origin	Directors	Territories	Admissions	Year of production
1	Kuky se vrací 2D	CZ	Jan Sverák	4	366 643	2010
2	Ctyrlístek ve sluzbách krále	CZ	Michal Zabka	2	285 196	2013
3	Saxána a Lexikon kouzel2D	CZ	Václav Vorlícek	3	248 072	2010
4	Alois Nebel 2D	CZ / DE	Tomás Lunák	9	160 692	2011
5	Kozi pribeh se syrem	CZ	Jan Tománek	2	156 307	2012
6	Na půdě aneb Kdo má dneska narozeniny?	CZ / SK / JP	Jirí Barta	9	68 667	2009
7	Le jardinier qui voulait etre être roi	CZ	D.Súkup, K.Dufková, V.Pospísilová	1	62 462	2010
8	Pat et Mat	CZ	Marek Benes	2	59 172	2014
9	Kovár z Podlesí	CZ	Pavel Göbl	2	55 773	2013
10	Autopohádky 2D	CZ	divers	2	32 365	2011

OBS LUMIERE

53 Top 10 Danish animation films by admissions in the world ● 2010-2014

Rank	Film	Country of origin	Directors	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 gulve	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. Vestbjerg, A. 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	Jensen og jensen	DK	Craig Frank	1	29 879	2011

OBS LUMIERE

54 Top 7 Finnish animation films by admissions in the world ● 2010-2014

Rank	Film	Country of origin	Directors	Territories	Admissions	Year of production
1	Niko 2: Lentäjäveljekset	FI / DE / DK / IE	Kari Juusonen, Jørgen Lerdam	23	2776442	2012
2	Niko - lentäjän poika	FI / DE / DK / IE	Michael Hegner, Kari Juusonen	2	357 483	2008
3	Muumit Rivieralla	FI / FR	Xavier Picard, Hanna Hemilä	23	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

OBS LUMIERE

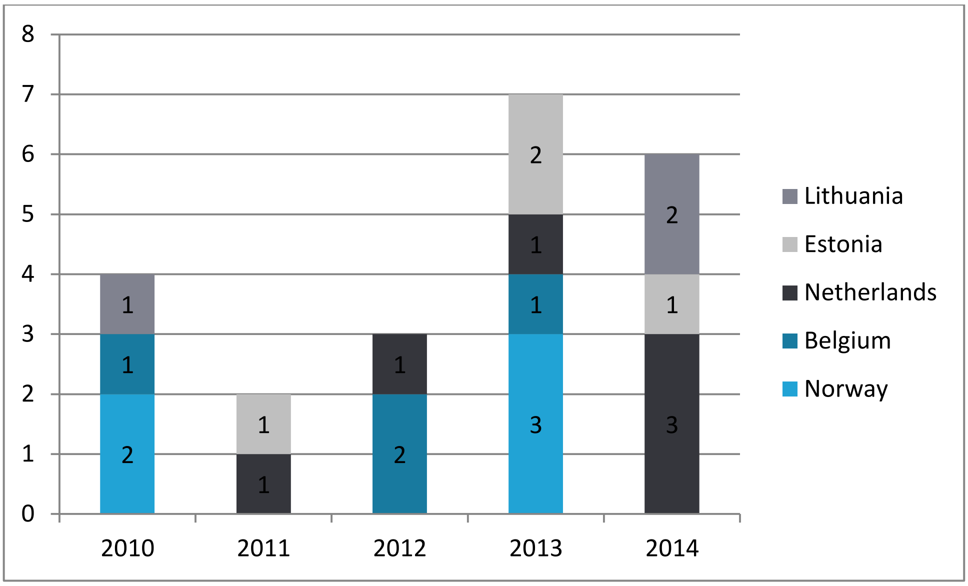
55 Top 7 Swedish animation films by admissions in the world ● 2010-2014

Rank	Film	Country of origin	Directors	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	Tomtar & troll: Den hemliga kammaren	SE	Robert Rhodin	2	14 805	2008
6	Metropia	SE / DK / NO / FI	Tarik Saleh	6	8 789	2009
7	Freak Out	SE / DE / DK / NO / GB / US / CH / AT	Carl Javér	1	2 596	2014

OBS LUMIERE

56 Feature animation films produced with a theatrical release ● 2010-2014

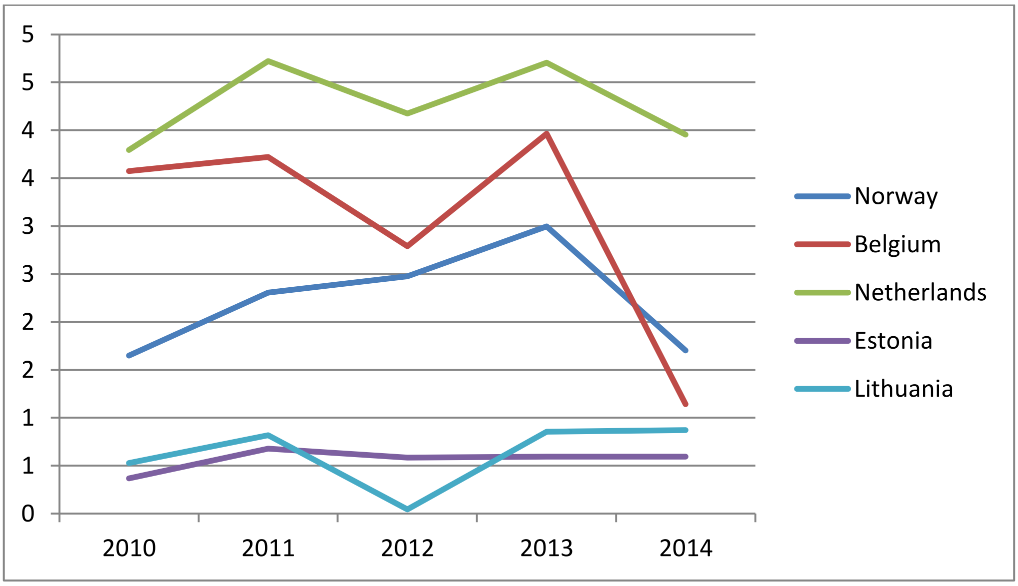
In number of films



OBS LUMIERE

57 Admissions to animation films by country ● 2010-2014

In millions



OBS LUMIERE

58 Top 7 Norwegian animation films by admissions in the world ● 2010-2014

Rank	Film	Country of origin	Directors	Territories	Admissions	Year of production
1	Solan og Ludvig - Jul i Flåklypa	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

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59 Top 7 Belgian animation films by admissions in the world ● 2010-2014

Rank	Film	Country of origin	Directors	Territories	Admissions	Year of production
1	Sammy's avonturen: De geheime doorgang	BE / US	Ben Stassen	36	8 397 022	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	6 194 627	2013
4	Couleur de peau: Miel	BE / FR / KR / CH	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 / NO	Andrea Kiss	1	42 700	2008
7	Fly Me to the Moon	BE / US	Ben Stassen	26	36 691	2008

OBS LUMIERE

60 Top 7 Dutch animation films by admissions in the world ● 2010-2014

Rank	Film	Country of origin	Directors	Territories	Admissions	Year of production
1	Sprookjesboom de Film	NL	Hans Walther	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

61 Top 4 Estonian animation films by admissions in the world ● 2010-2014

Rank	Film	Country of origin	Directors	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, a Rapid Love Story	EE	Mait Laas	1	3 981	2013
3	Suur maalriöö	EE	Aina Järviine, Meelis Arulepp	1	3 053	2013
4	Muhu ätsed ja roosid/Tantsitaja	EE	Kadriann Kibus	1	79	2014

OBS LUMIERE

62 Top 4 Lithuanian animation films by admissions in the world ● 2010-2014

Rank	Film	Country of origin	Directors	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 nuotykiai	LT	Augustinas Gricius, Vaidas Lekavicius	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	Evald Lacis, Maris Brinkmanis, Dace Riduze	2	7 267	2008

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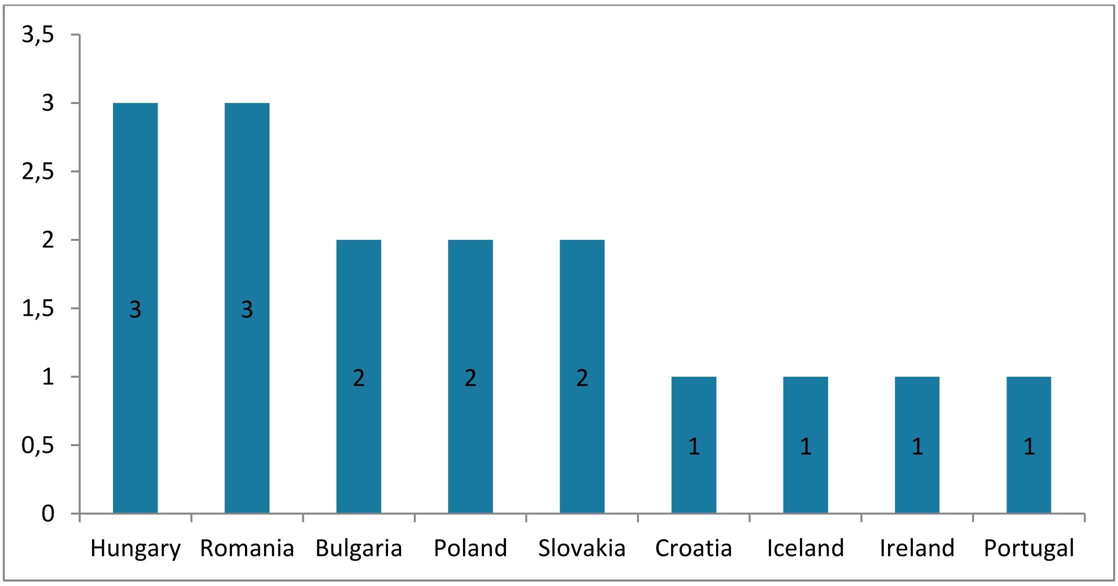
63 Aggregate number of feature animation films ● 2010-2014

In numbers of films produced



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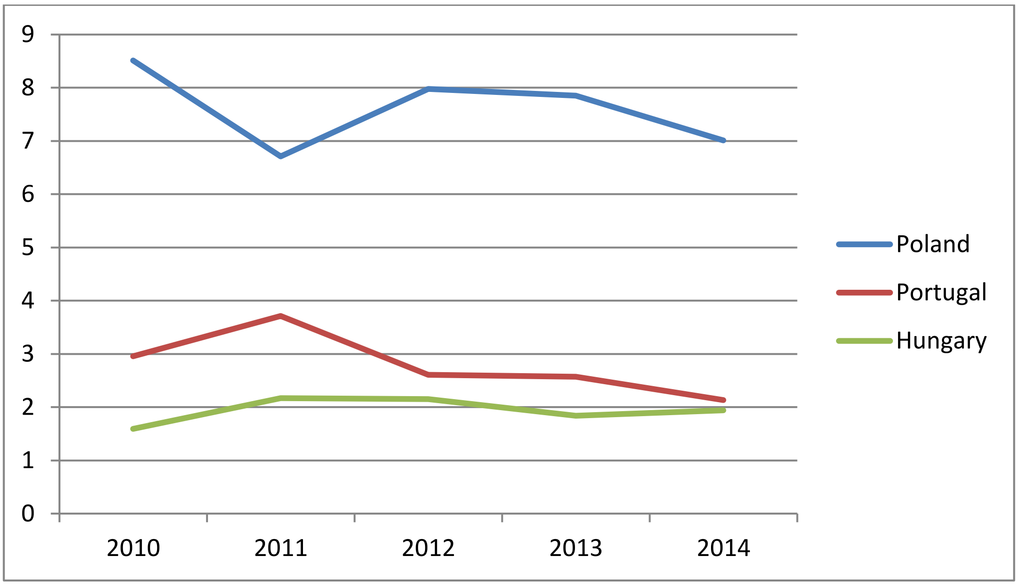
64 Admissions to animation films by country ● 2010-2014[22]

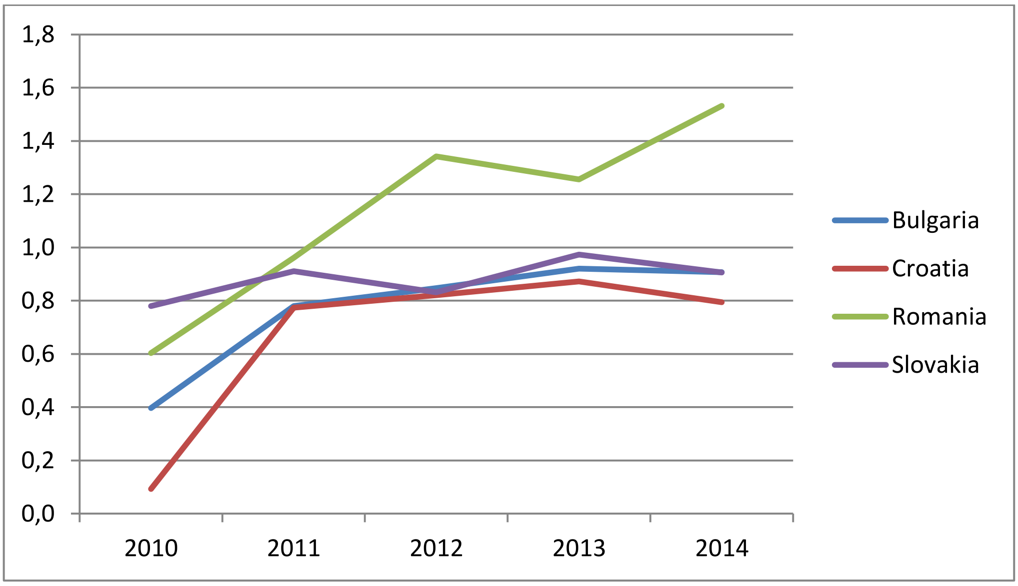
In millions



OBS LUMIERE

65 Admissions to animation films by country ● 2010-2014[23]

In millons



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

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

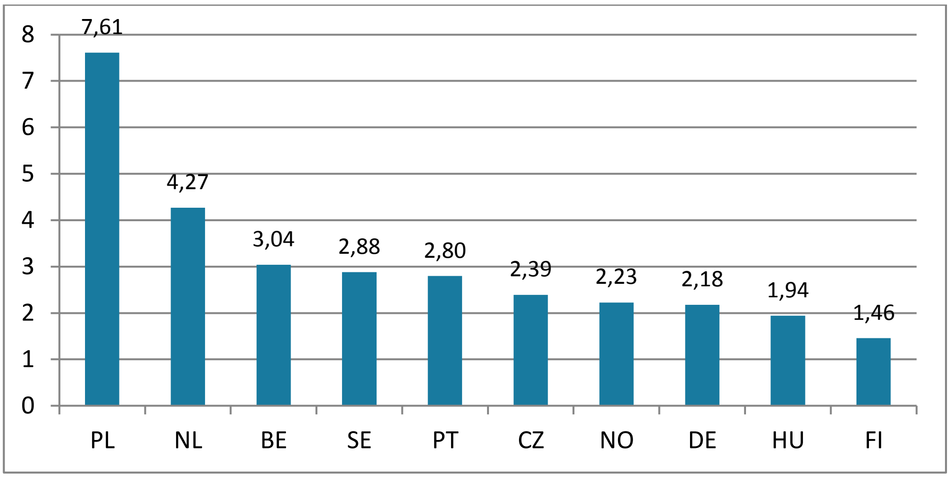
66 Other European[24] animation films by admissions in the world ● 2010-2014

Rank	Film	Country of origin	Directors	Territories	Admisions	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 / LU / FR	Tomm Moore	4	159 434	2014
3	Fimfárum - Do třetice všeho dobrého 3D	SK / US	V. Pospísilová, K. Dufková, D. Súkup	3	140 112	2011
4	Jez Jerzy	PL	J.Tarkowski T.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	Zdzislaw Kudla, Andrzej Orzechowski	1	19 081	2009
8	Crulic - drumul spre dincolo	RO / PL	Anca Damian	8	7 414	2011
9	The Stressful Adventures of Boxhead & Roundhead	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, et alii.	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

OBS LUMIERE

67 Top 10 other European countries by average admissions ● 2010-2014

In millons



OBS LUMIERE

[24] Countries with less than 3 films produced, as sole producers or majority co-producers, and released in the period 2010-2014.

1.1.9 Minority co-production countries

68 Belgium ● 2010-2014

Rank	Title	Country of origin	Director	Worldwide admissions	Year of production
1	Minuscule - La vallée des fourmis perdues	FR / BE	Thomas Szabo, Hélène Giraud	2 819 535	2013
2	Zarafa	FR / BE	Jean-Christophe Lie, Rémi Bezançon	1 737 029	2012
3	Ernest & Celestine	FR / BE / LU	Stéphane Aubier, Vincent Patar	716 556	2012
4	Une vie de chat	FR / NL / CH / BE	Jean-Loup Felicioli, Alain Gagnol	644 405	2010
5	Jack et la mécanique du coeur	FR / BE	Stéphane Berla, Mathias Malzieu, Stéphane Berla	584 369	2013
6	Pinocchio	IT / LU / BE / FR	Enzo D'Alò	490 156	2012
7	Le jour des corneilles	FR / LU / CA / BE	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 / LU / FR	Tomm Moore	159 434	2014
12	The Prodigies	FR / BE / LU	Antoine Charreyron	147 870	2010
13	The Congress	IL / BE / DE / LU / FR / PL	Ari Folman	146 423	2013
14	Le parfum de la carotte	FR / BE / CH	Rémi Durin, Arnaud Demuynck	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 / NO	Martin Clapp, Gabriel Jacquel, Anne Kristin Berge	62 282	2011
19	Trippel Trappel Dierensinterklaas	NL / BE	Albert 't Hooft, Paco Vink	58 451	2014
20	L'histoire du petit Paolo	FR / BE	Cecilia Marreiros-Marum, Nicolas Liguori, Hugo Frassetto, Vincent Bierrewaerts, Arnaud Demuynck	40 378	2011
21	Monstres... pas si monstrueux!	FR / BE	Julia Bueno, Cheng Li, Catherine Lepicard, Inès Pagniez, Julien Roguet, Paul Torris, Jean-Claude Rozec, Pascale Hecquet	37 856	2012
22	Last Hijack	NL / DE / IE / BE	Tommy Pallotta, Femke Wolting	558	2014

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69 Luxembourg ● 2010-2014

Rank	Title	Country of origin	Director	Worldwide admissions	Year of production
1	Ernest & Celestine	FR / BE / LU	Stéphane Aubier, Vincent Patar	716 556	2012
2	Pinocchio	IT / LU / BE / FR	Enzo D'Alò	490 156	2012
3	Le jour des corneilles	FR / LU / CA / BE	Jean Christophe Dessaint	428 325	2011
4	Song of the Sea	IE / DK / BE / LU / FR	Tomm Moore	159 434	2014
5	The Prodigies	FR / BE / LU	Antoine Charreyron	147 870	2010
6	The Congress	IL / BE / DE / LU / FR / PL	Ari Folman	14 6423	2013
7	Tante Hilda	FR / LU	Jacques-Rémy Girerd, Benoit Chieux	105 489	2013
8	Ma maman est en Amérique, elle a rencontré Buffalo Bill	FR / LU	Thibaut Chatel, Marc Boreal	74 502	2012
9	Les fantastiques livres volants de M. Morris Lessmore	FR / AR / US / LU	William Joyce, Brandon Oldenburg	48 392	2011
10	Rose et Violette	CA / LU	Andrew Ruhemann, Shaun Tan, Louise Seynhaeve, Raphaëlle Ranson, et alii.	21 487	2011
11	The Golden Horse	LT / LV / LU / DK	Valentas Ashkins, Reinis Kalnaellis	19 552	2014

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70 Ireland ● 2010-2014

Rank	Title	Country of origin	Director	Worldwide admissions	Year of production
1	Niko 2: Lentäjäveljekset	FI / DE / DK / IE	Kari Juusonen, Jørgen Lerdam	2 776 383	2012
2	Hetjur Valhallar - Þór	IS / DE / IE	Óskar Jónasson	1 137 650	2011
3	Der Mondmann	FR / DE / IE	Stephan Schesch, Sarah Clara Weber	224 193	2012
4	The Snowman and the Snowdog	GB / IE	Hilary Audus	130 216	2012
5	Last Hijack	NL / DE / IE / BE	Tommy Pallotta, Femke Wolting	558	2014

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71 Latvia ● 2010-2014

Rank	Title	Country of origin	Director	Worldwide admissions	Year of production
1	Lotte ja kuukivi saladus	EE / LV	Heiki Ernits, Janno Põldma	200 948	2011
3	The Golden Horse	LT / LV / LU / DK	Valentas Ashkins, R. Kalnaellis	19 552	2014
4	Rocks in My Pockets	US / LV	Signe Baumane	8 008	2014

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72 Poland ● 2010-2014

Rank	Title	Country of origin	Director	Worldwide admissions	Year of production
1	The magic piano	FR / PL / BE / NO	Martin Clapp, Gabriel Jacquel, Anne Kristin Berge	62 282	2011
2	The Flying Machine	GB / PL / CN / IN / NO	Martin Clapp, Dorota Kobiela	45 561	2011
3	Gottland	CZ / PL	Viera Cákanyová, Radovan Síbrt, Lukás Kokes, Rozálie Kohoutová, Petr Hátle, Klára Tasovská	7 898	2014
4	Crulic - drumul spre dincolo	RO / PL	Anca Damian	7 414	2011

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73 Switzerland ● 2010-2014

Rank	Title	Country of origin	Director	Worldwide admissions	Year of production
1	Une vie de chat	FR / NL / CH / BE	Jean-Loup Felicioli, Alain Gagnol	644 405	2010
2	Le parfum de la carotte	FR / BE / CH	Rémi Durin, Arnaud Demuynck	108 122	2014
3	Couleur de peau: Miel	BE / FR / KR / CH	Henin Jung, Laurent Boileau	76 309	2012
4	Perdu? Retrouve!	GB / CH / FR	Pink Nanuk, Philip Hunt, Joanna Lurie	32 068	2010

RENTRAK, OBS LUMIERE

1.1.10 Turkey

Key country figures

Population 2014 e	**76,7**	**million**		
GDP / capita 2014 e	10 518	USD		
Film Landscape 2014				
Gross box office all films	655,4	M TRY	300,0	M USD
Admissions all films	61,35	million		
Gross box office animation (1)	54,36	M TRY	24,88	M USD
Admissions animation	5,09	million		
Average admissions animation 2010-2014	4,65	million		
Screens (digital screen penetration)	986 (68%)			

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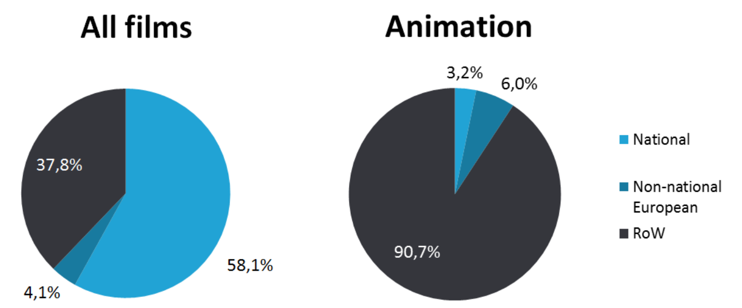
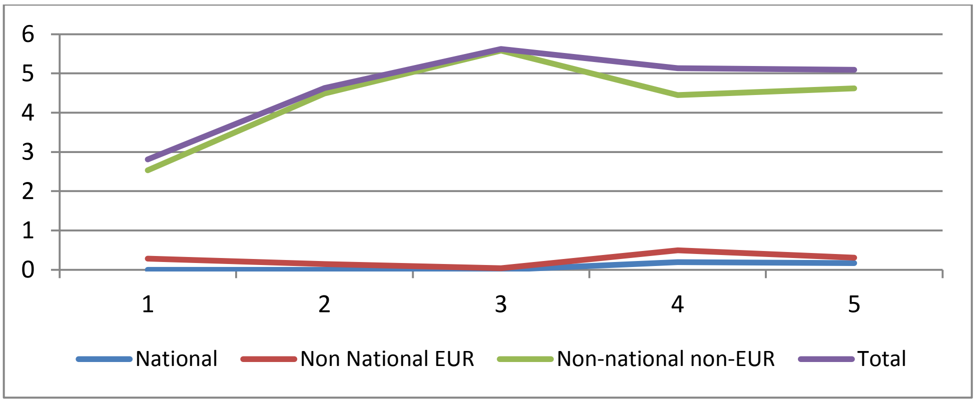
74 Market shares 2014



75 Admissions to animation films in Turkey by country of production (in millions) ● 2010-2014



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76 Top 3 Turkish animation films by admissions in the world ● 2010-2014

Rank	Title	Country	Director	Territories	Admissions	Year
1	Ayas	TR	M. Tugrul Tiryaki, Hüseyin Emre Konyali	2	198 930	2013
2	Iksir	TR	Birkan Uz	1	110 150	2014
3	Evliya Çelebi ve Ölümsüzlük Suyu	TR	Serkan Zelzele	1	44 634	2013

ANTRAK, OBS LUMIERE

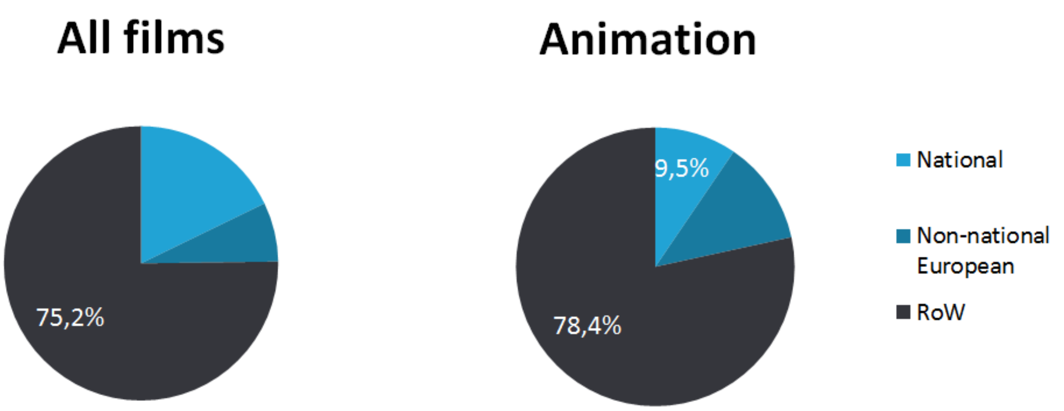
1.1.11 Russian Federation

Key country figures

Population 2014 e	**143,7**	**million**		
GDP / capita 2014 e	14 317	USD		
Film Landscape 2014				
Gross box office all films	43 332,0	B RUB	1 150,0	M USD
Admissions all films	176,10	million		
Gross box office animation (1)	8 519,9	B RUB	226,11	M USD
Admissions animation	34,62	million		
Average admissions animation 2010-2014	33,10	million		
Screens (digital screen penetration)	3829 (96.4%)			

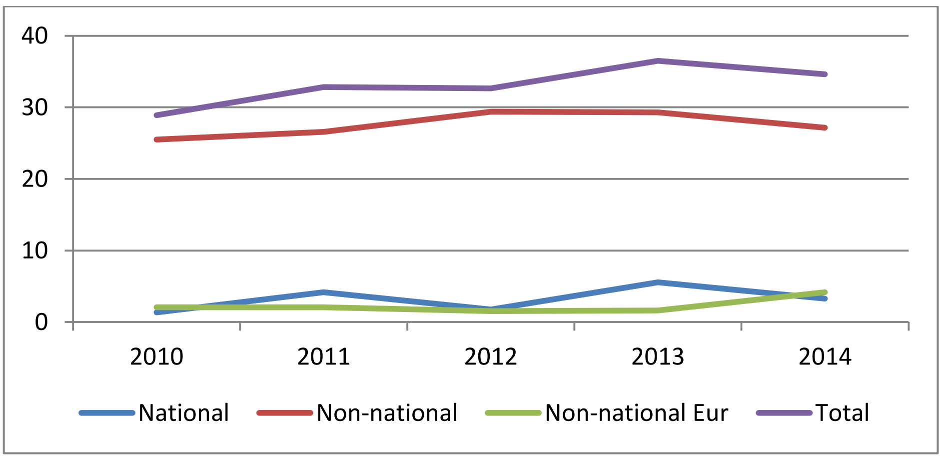
ANTRAK, OBS LUMIERE

77 Market shares 2014



78 Admissions to animation films in Russia by country of production • 2010-2014[25]

In millons



OBS LUMIERE

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

79 Top 10 Russian animation films by admissions in the world ● 2010-2014

Rank	Title	Country of origin	Director	Territories	Admissions	Year of production
1	Tri bogatyrya na dalnikh beregakh	RU	Konstantin Feoktistov	1	4 103 342	2012
2	Tri bogatyrya i Shamakhanskaya tsaritsa	RU	Sergei Glezin	1	3 340 877	2010
3	Ivan Tsarevich i Seryy Volk 2	RU	Vladimir Toropchin	1	2 818 938	2013
4	Snezhnaya koroleva	RU	Maksim Sveshnikov, Vlad Barbe	13	1 959 863	2012
5	Belka i Strelka. Zvezdnye sobaki	RU	Svyatoslav Ushakov, Inna Evlannikova	11	1 409 571	2010
6	Smeshariki: Nachalo	RU	Denis Chernov	2	1 356 227	2011
7	Belka i Strelka: Lunnye priklyucheniya	RU	Inna Evlannikova, Vadim Sotskov, Aleksander Khramtsov	2	1 077 270	2014
8	Snezhnaya koroleva 2. Snezhnyy korol	RU	Aleksey Tsitsilin	6	632 065	2014
9	Kak poymat pero Zhar-Ptitsy	RU	Vyacheslav Plotnikov	1	426 619	2013
10	Ot vinta 3D	RU	Olga Lopato	5	405 514	2012

NEVAFILM, OBS LUMIERE

1.1 12 North America

Key country figures

	North America	US	Canada
Population 2014 e (million)	354,0	318,5	35,5
GDP / capita 2014 e (USD)	54 267	54 678	50 577
Film Landscape 2014			
Gross box office all films (m USD)	10 400	9877 (1)	1009 (1)
Admissions all films (million)	1 270	1155	116
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
Screens 2014 (digital screen penetration)	43265 (96%)	40158 (95.7%)	3107 (100%)

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[26] 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).

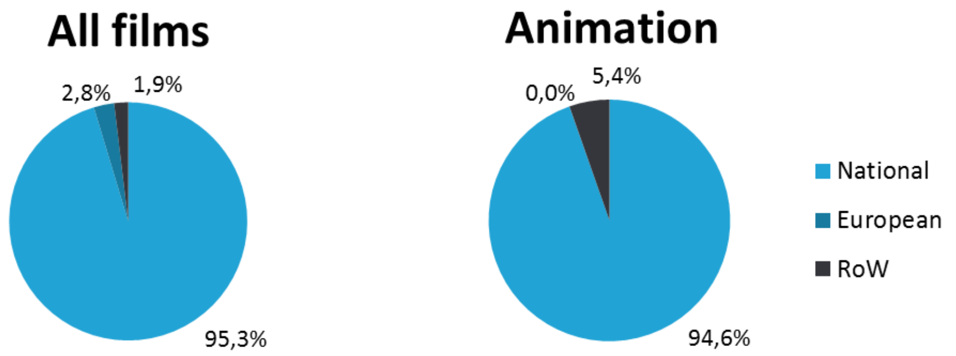
Attendance to feature animation films in the US amounted to a yearly average of 179 million admissions during the exploitation period 2010-2014 – the highest level, by far, within the countries covered by Focus on Animation. If we only look at new films (defined as films produced up to two years before 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.

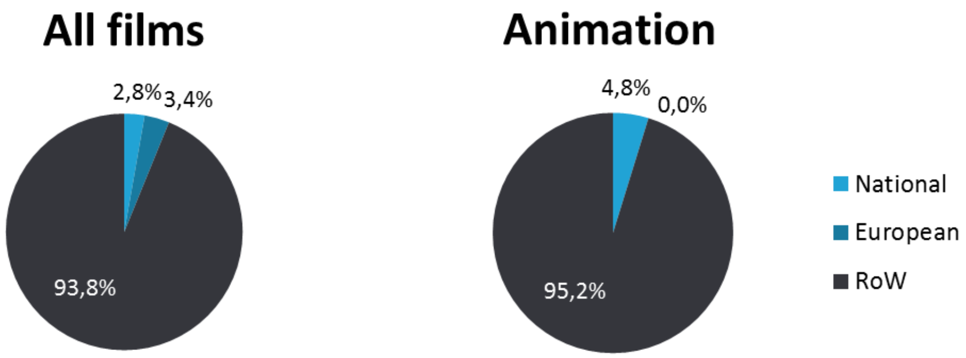
RENTRAK/OBS

[26] 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 make part of the production volume statistics.

80 Market shares US 2014



81 Market shares Canada 2014



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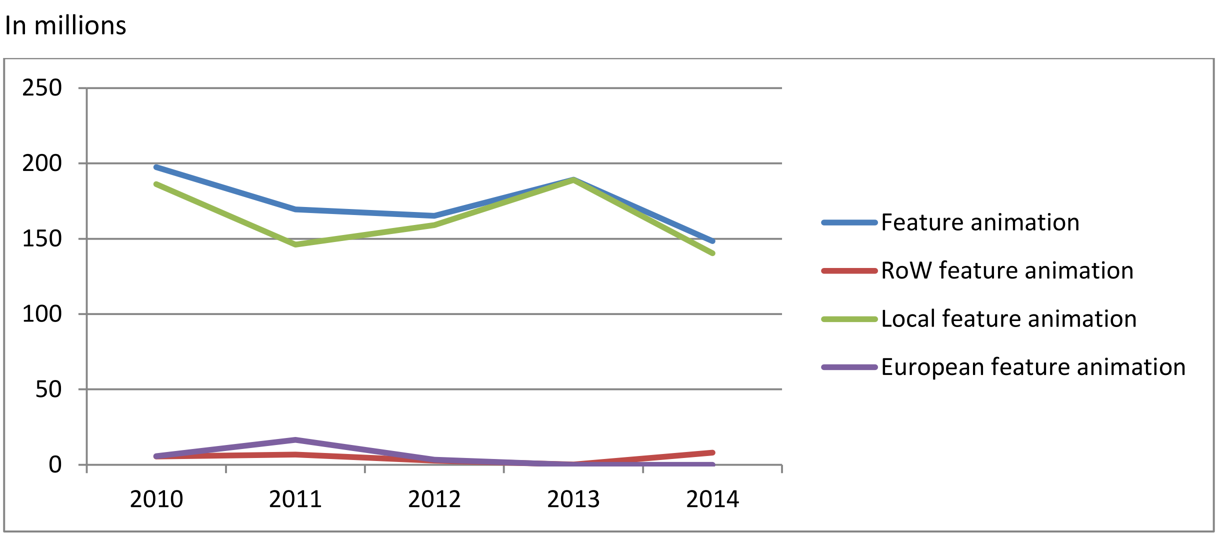
82 Admissions to animation films in US by country of production • 2010-2014[27]



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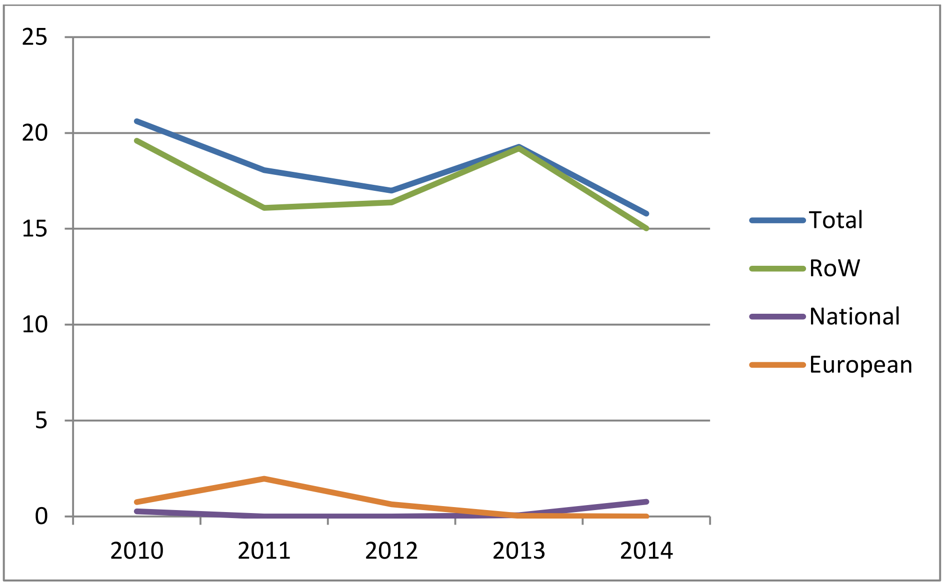
[27] It only includes new productions (films produced up two years before the release year).

83 Admissions to animation films in Canada by country of production ● 2010-2014[28]

In millions



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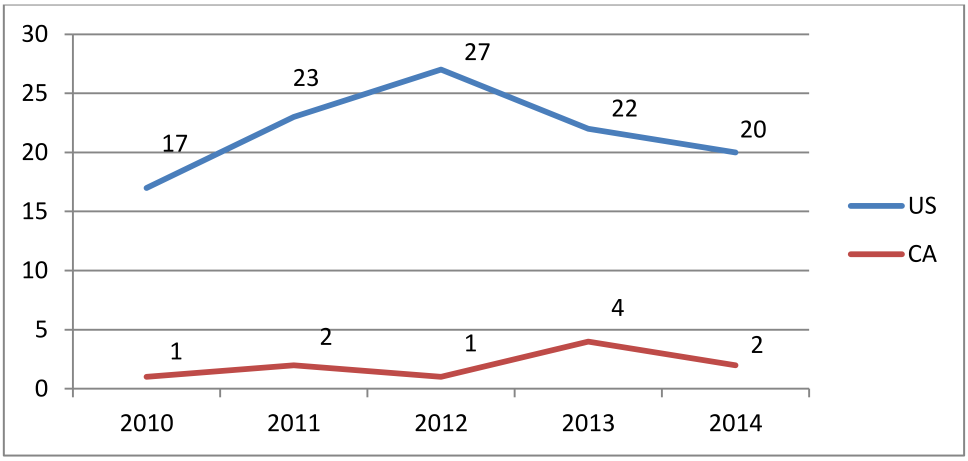
84 Production volume ● 2010-2014[29]

In number of films



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[28] It only includes new productions (films produced up two years before the release year).

[29] Only films with a theatrical release. Films produced but not released before the end of 2014 could not be taken into account.

85 Top 10 European animation films in the US ● 2010-2014

Rank	Title	Country of origin	Director	Distributor	US admissions	Year of production
1	Gnomeo and Juliet	GB INC/ US	Kelly Asbury	Walt Disney Studios	11 214 220	2011
2	Arthur Christmas	GB INC / US	Sarah Smith, Barry Cook	Sony Pictures	5 026 418	2011
3	The Pirates! Band of Misfits	GB INC / US	Jeff Newitt, Peter Lord	Sony Pictures	3 235 821	2012
4	Planet 51	ES / GB	Javier Abad, Jorge Blanco	Sony Pictures	352 789	2009
5	L'illusioniste	GB / FR	Sylvain Chomet	Sony Classics	284 257	2009
6	Chico & Rita	ES / GB	Javier Mariscal, Fernando Trueba	GKids	45 771	2010
7	Une vie de chat	FR / NL / CH / BE	Jean-Loup Felicioli, Alain Gagnol	GKids	38 268	2010
8	Ernest & Celestine	FR / BE / LU	Stéphane Aubier, Vincent Patar	GKids	31 963	2012
9	Panique au village	BE / LU / FR	Stéphane Aubier, Vincent Patar	Zeitgeist Films	18 228	2009
10	Is the Man Who Is Tall Happy? An Animated Conv. with N Chomsky	FR	Michel Gondry	IFC Films	16 132	2013

RENTRAK, OBS LUMIERE

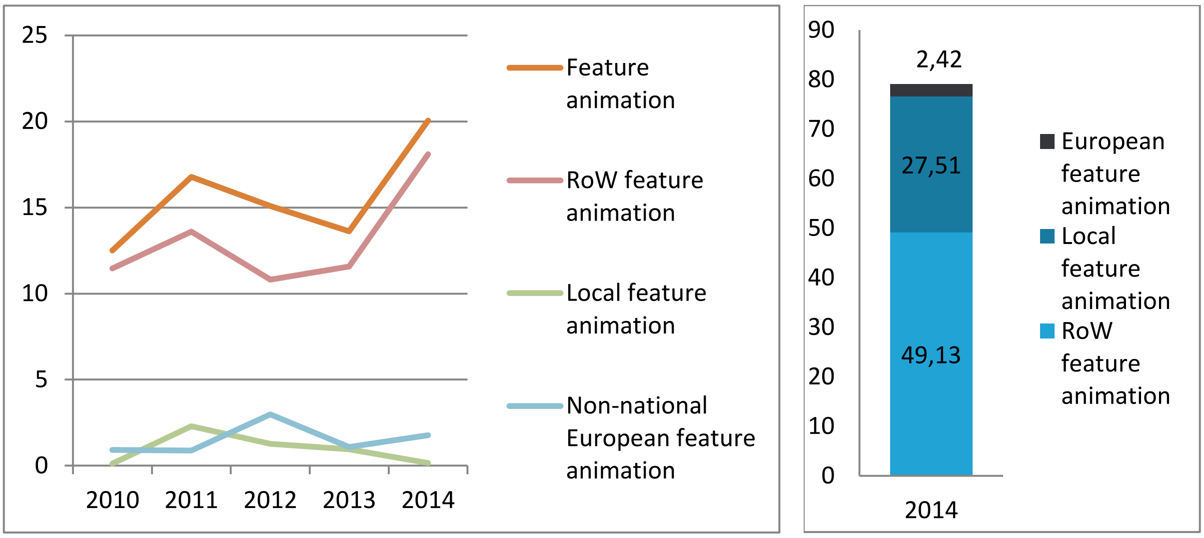
86 Top 10 European animation films by admissions in Canada ● 2010-2014

Rank	Title	Country of origin	Director	Distributor	Admissions in Canada	Year of production
1	Gnomeo and Juliet	GB INC / US	Kelly Asbury	E1 Films	1 227 844	2011
2	Arthur Christmas	GB INC / US	Sarah Smith, Barry Cook	Sony Pictures	656 719	2011
3	The Pirates! Band of Misfits	GB INC / US	Jeff Newitt, Peter Lord	Sony Pictures	568 037	2012
4	Arthur et la vengeance de Maltazard	FR	Luc Besson	Alliance	56 693	2009
5	Un monstre à Paris	FR	Bibo Bergeron	Alliance	32 915	2011
6	Arthur et la guerre des deux mondes	FR	Luc Besson	Alliance	17 477	2010
7	Ernest & Celestine	FR / BE / LU	Stéphane Aubier, Vincent Patar	Metropole Films	17 152	2012
8	Le magasin des suicides	FR / CA / BE	Patrice Leconte	E1 Films	5 085	2012
9	Une vie de chat	FR / NL / CH / BE	Jean-Loup Felicioli, Alain Gagnol	Mongrel Media	4 652	2010
10	Zarafa	FR / BE	Jean-Christophe Lie, Rémi Bezançon	E1 Films	3 553	2012

RENTRAK, OBS LUMIERE

1.1.13 Asia

87 Admissions to animation films in South Korea by country of prod. (in millions) ● 2010-2014[30]



RENTRAK, OBS LUMIERE

88 Top 5 South Korean animation films by admissions in the world ● 2010-2014

Rank	Title	Country	Director	Territories	Admissions	Year
1	Madangeul Naon Amtak	KR	Seong-yun Oh	5	2 239 162	2011
2	Jeom-bak-i: Han-ban-do-eui Gong-ryong 3D	KR	Han Sang-Ho	2	1 216 642	2012
3	Pororo, the Racing Adventure	KR / CN	Young Kyun Park	2	921 721	2013
4	The Outback[31]	KR / US	Kyung Ho Lee	5	573 611	2012
5	Jungle Shuffle	KR / MX	T. Park, M. De la Orta	4	131 233	2014

RENTRAK, OBS LUMIERE

89 Top 5 Chinese animation films by admissions in the world ● 2010-2014

Rank	Title	Country	Director	Distributor	Admissions	Year
1	Boonie Bears, to the Rescue!	CN	Ding Liang, Fuyuan Liu	Multiple	2 239 162	2014
2	Xi Yang Yang Yu Hui Tai Liang Zhi Fei Ma ...	CN	Yiu Chung William Kan	Huayi Bros	1 216 642	2014
3	Yugo and Lala 2	CN	Wang Yunfei	Multiple	921 721	2014
4	Seer IV	CN	Zhang Jun Wang	Multiple	573 611	2014
5	The Magic Brush	CN	Zhixing Zhong	China Film Group	131 233	2014

RENTRAK, OBS LUMIERE

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

[31] The film did additional 875 219 admissions in China in 2014.

90 Top 5 Japanese animation films by admissions in the world[32] ● 2010-2014

In number of films

Rank	Title	Country of origin	Director	Territories	Admissions	Year of production
1	Kari-gurashi no Arietti	JP	Hiromasa Yonebayashi, Gary Rydstrom	20	4 783 403	2010
2	Doragon bôru Z: Kami to kami	JP	Masahiro Hosoda	11	3 413 925	2013
3	Kaze tachinu	JP	Hayao Miyazaki	23	2 209 821	2013
4	Seinto Seiya: Legend of Sanctuary	JP	Kei'ichi Sato	6	1 657 240	2014
5	Space Pirate Captain Harlock	JP	Shinji Aramaki	6	1 464 946	2013

RENTRAK, OBS LUMIERE

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

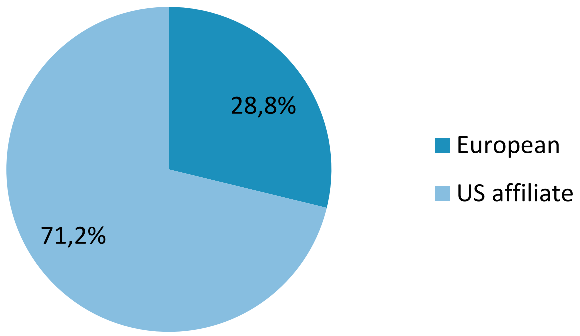
1.2 TV and VOD production and distribution

Key figures

Population 2014 [e]	**507**	**million**		
GDP per capita 2014 [e]	36 700	USD		
Television households	210,762	million		
Digital TV households	88%			
		Free to air	Public	Private
EU-based children's channels	329	22	23	306
Of which, channels of US affiliates (in EU)	234			
Other European (non-EU) childrens channels	53			
EU-based film channels	394	6	4	390
Of which, channels of US affiliates (in EU)	162			
Other European (non-EU) film channels	139			

IHS, OBS MAVISE

91 Children's TV channels established in the EU



IHS, OBS MAVISE

1.2.1 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 and Junior, and with a particularly high level of support on Your Family Entertainment (now Fix&Foxi).

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. (END OF INTRODUCTION IN THE FOCUS)

1.2.2 Mapping European television

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.

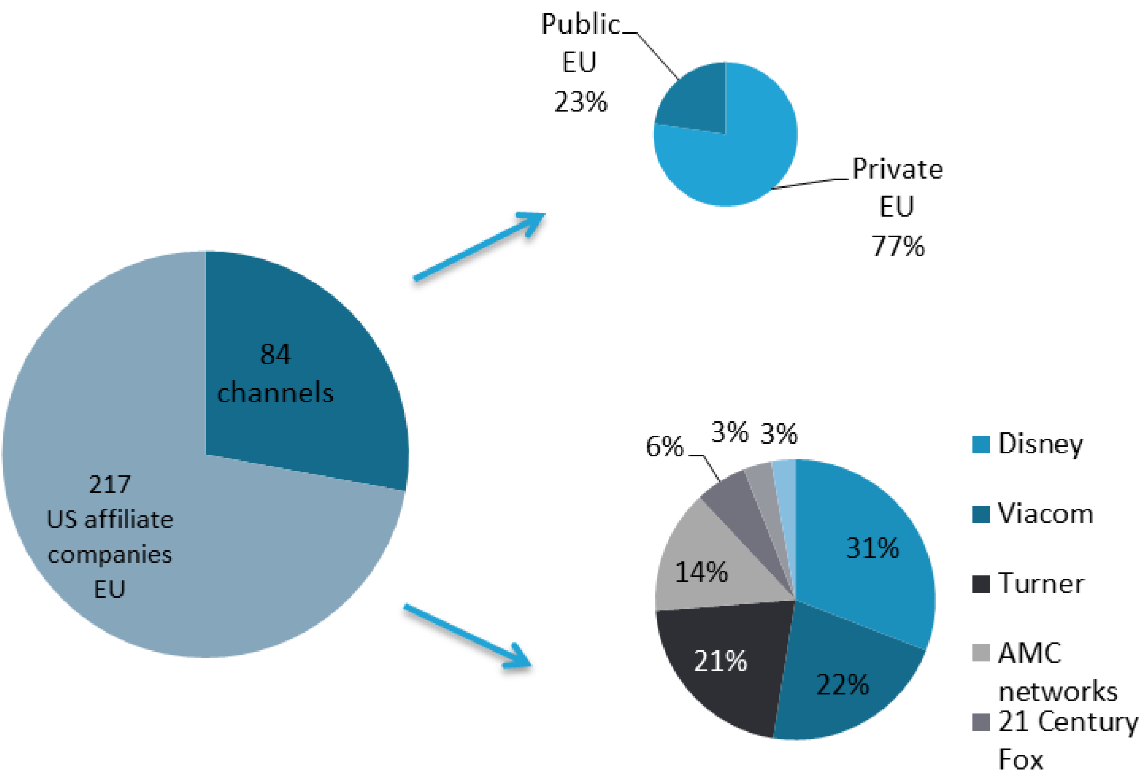
The development of specific television channels that target children began in the United States in the 1980s along with the general evolution of niche television channels that had growing access to cable or satellite capacity for distribution. In Europe, one of the earliest examples of a children's TV 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 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 following graphs 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. 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).

ROVI INTERNATIONAL SOLUTIONS, OBS MAVISE

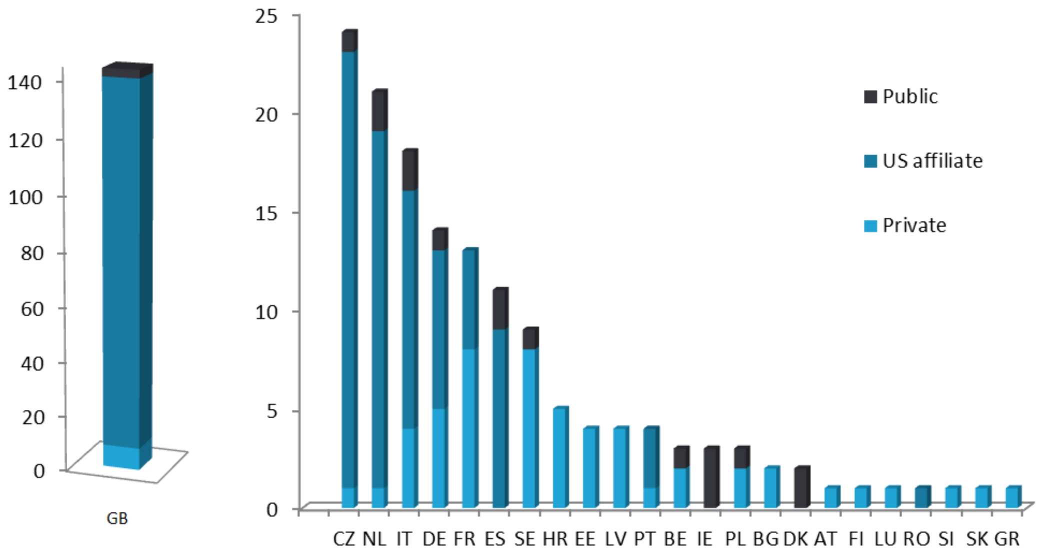
92 Children's channels established in the EU28 and types of ownership ● 2015



OBS MAVISE

93 National origin / establishment of EU children's channels ● 2015

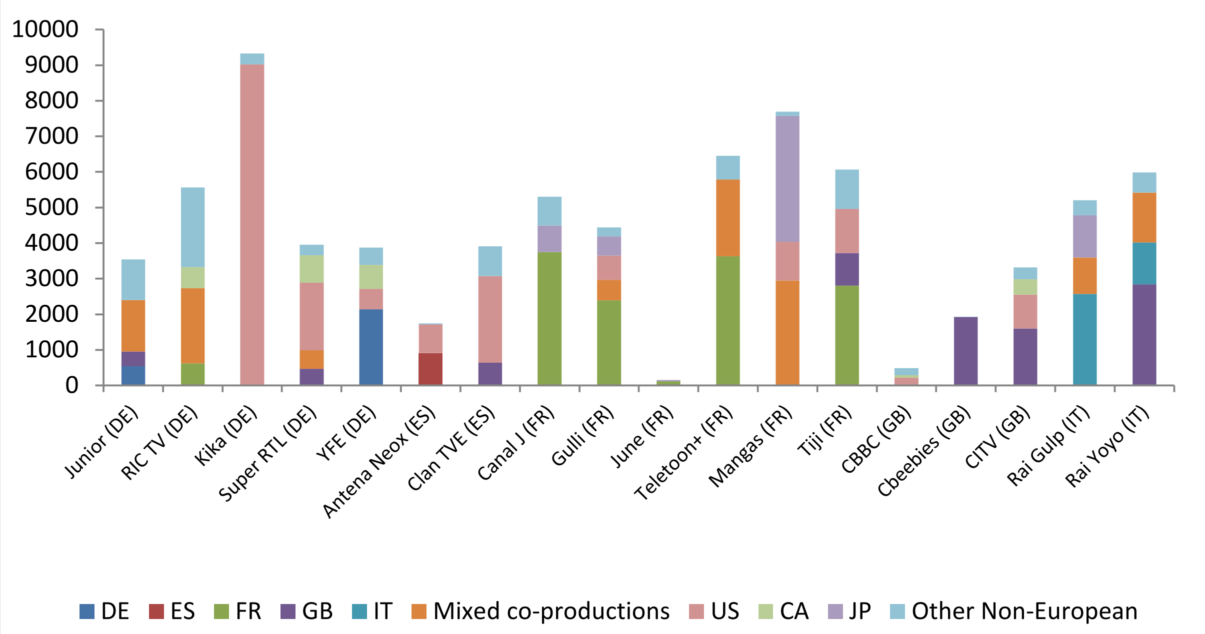
In units



OBS MAVISE

94 National children's channels and origin of animation ● 2013

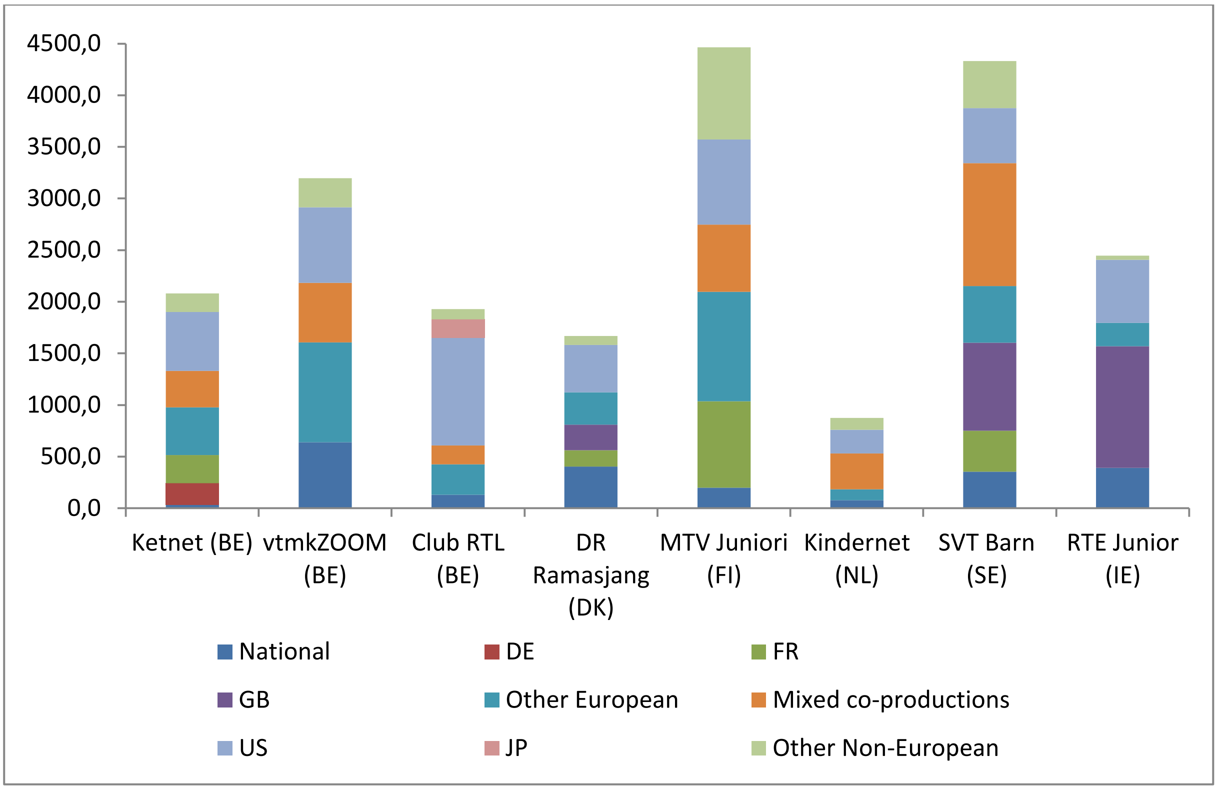
In units



ROVI INTERNATIONAL SOLUTIONS, OBS

95 National children's channels in smaller counties and origin of animation ● 2013

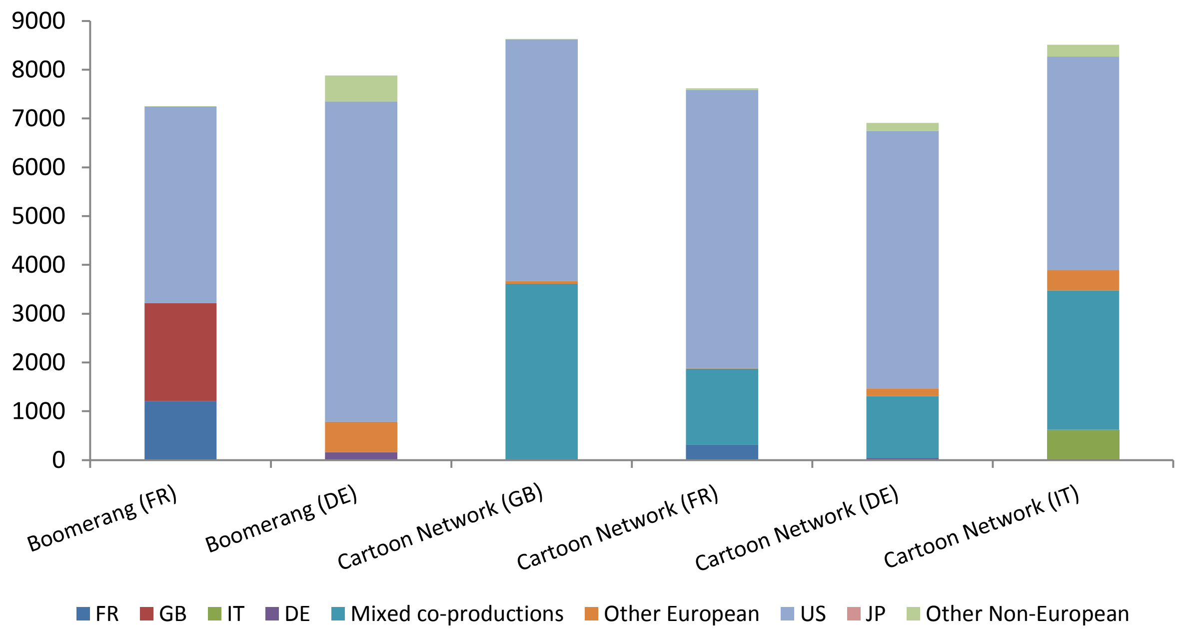
In hours



ROVI INTERNATIONAL SOLUTIONS, OBS

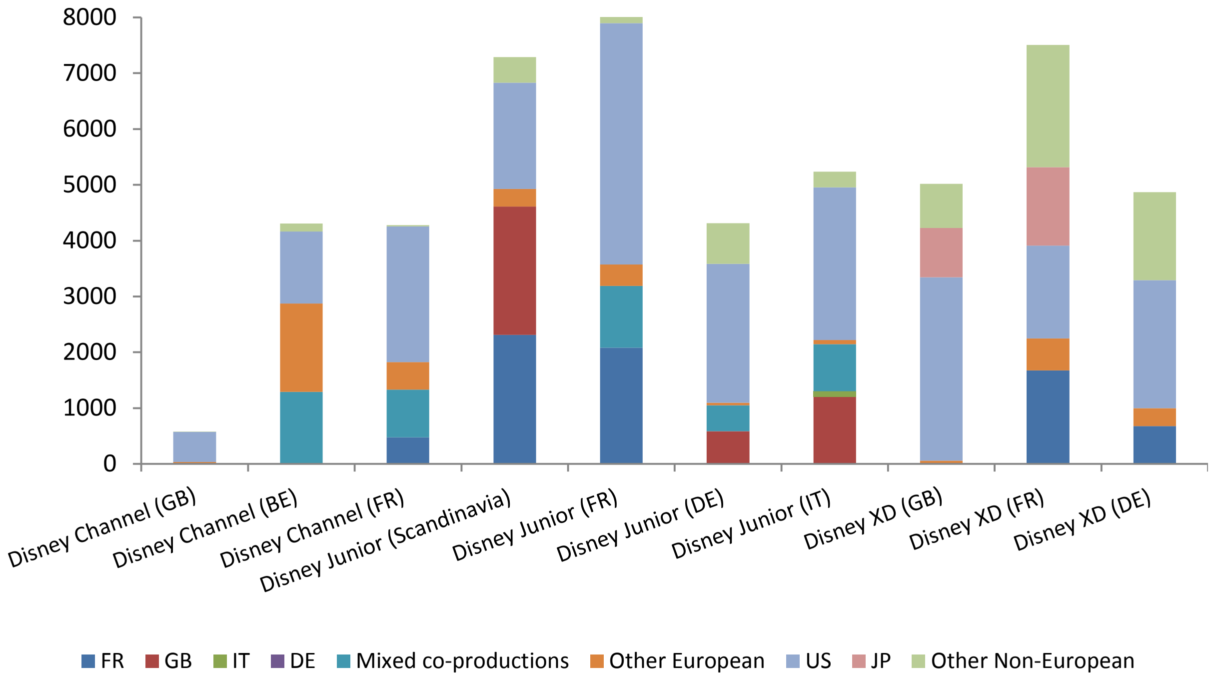
96 Origin of animation on the Pan-European children's television brands ● 2013

In hours



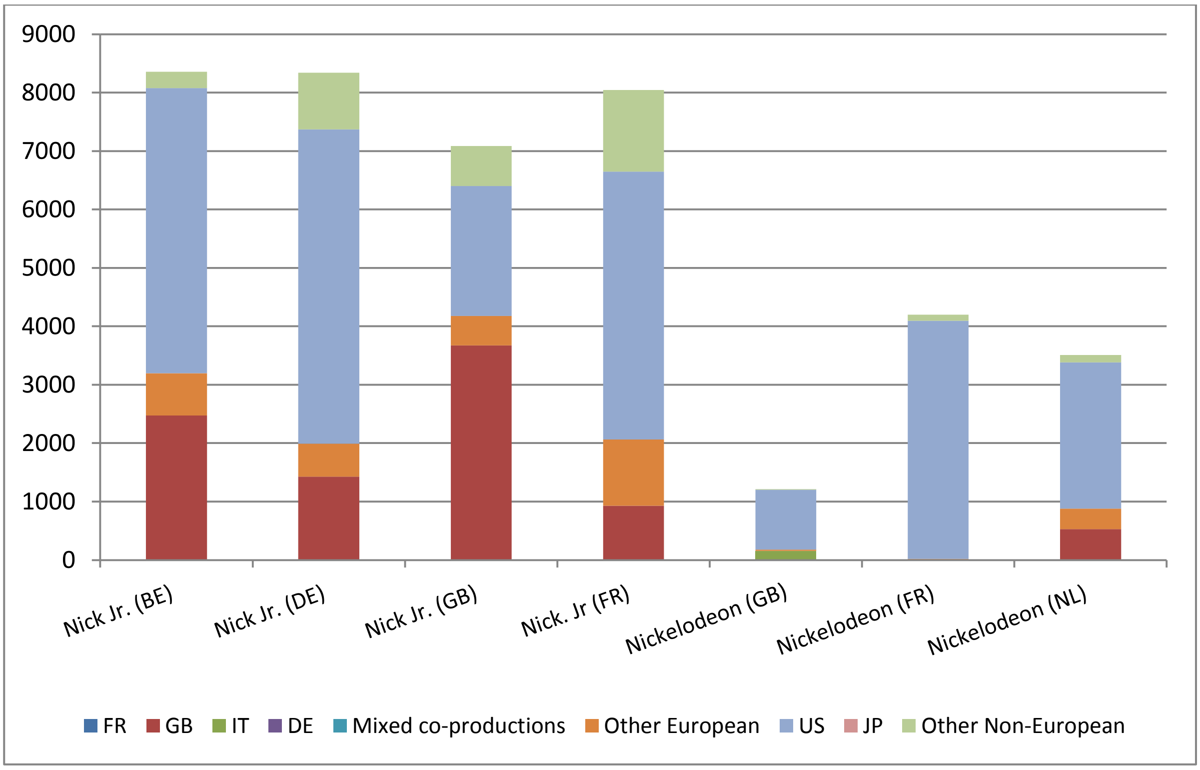
ROVI INTERNATIONAL SOLUTIONS, OBS

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



ROVI INTERNATIONAL SOLUTIONS, OBS

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



ROVI INTERNATIONAL SOLUTIONS, OBS

1.2.3 France

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		1	14
National film channels	19			23
Film channels targeting other countries	0			
Foreign film channels available	21[33]			

CNC, CSA, OBS MAVISE

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%). On the contrary, in 2013 a total of 54 series (-19%) were produced representing 17 745 minutes (-12%).

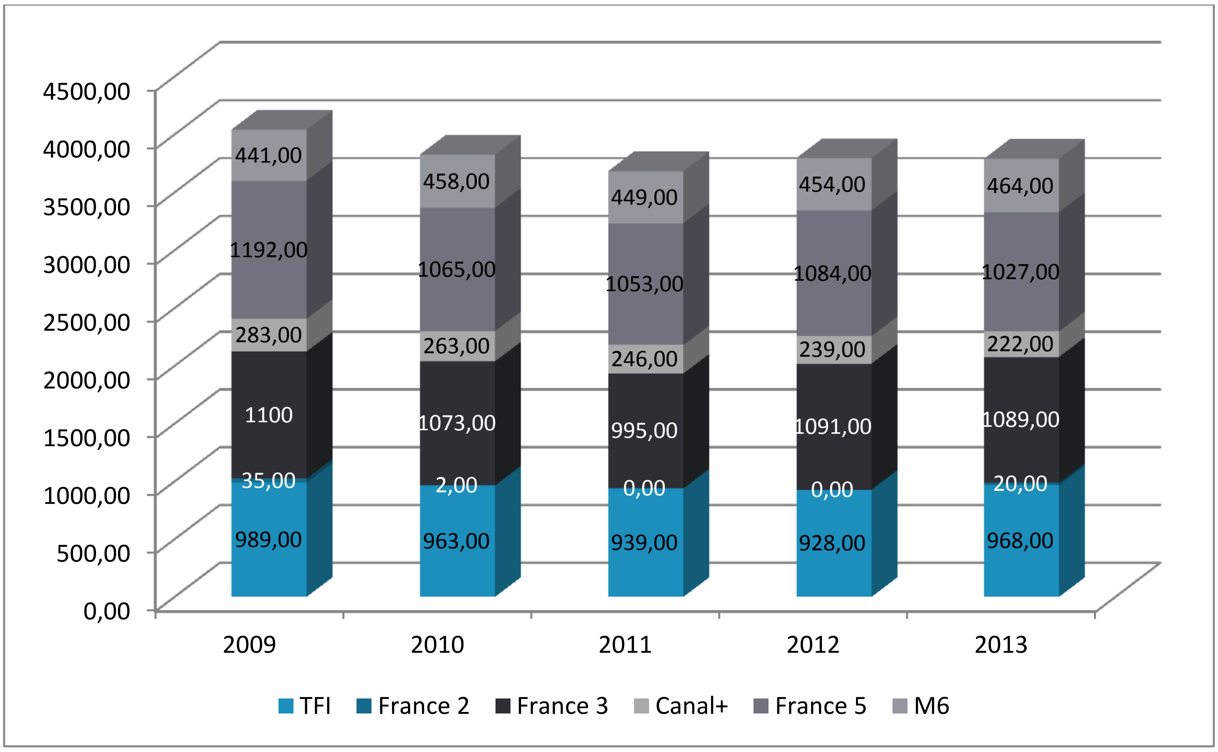
The third graphic based on data from ROVI International shows proportions of European animation on a large sample of channels (19 generalist/entertainment and 15 children) in 2013. The highest proportion of French animation appears on the French channels (in particular Canal J, Gulli, Mangas and Teletoon+).

CNC, ROVI INTERNATIONAL SOLUTIONS, OBS MAVISE

[33] Mainly over IPTV services.

99 CNC data on TV animation volume on six generalist channels ● 2009-2013

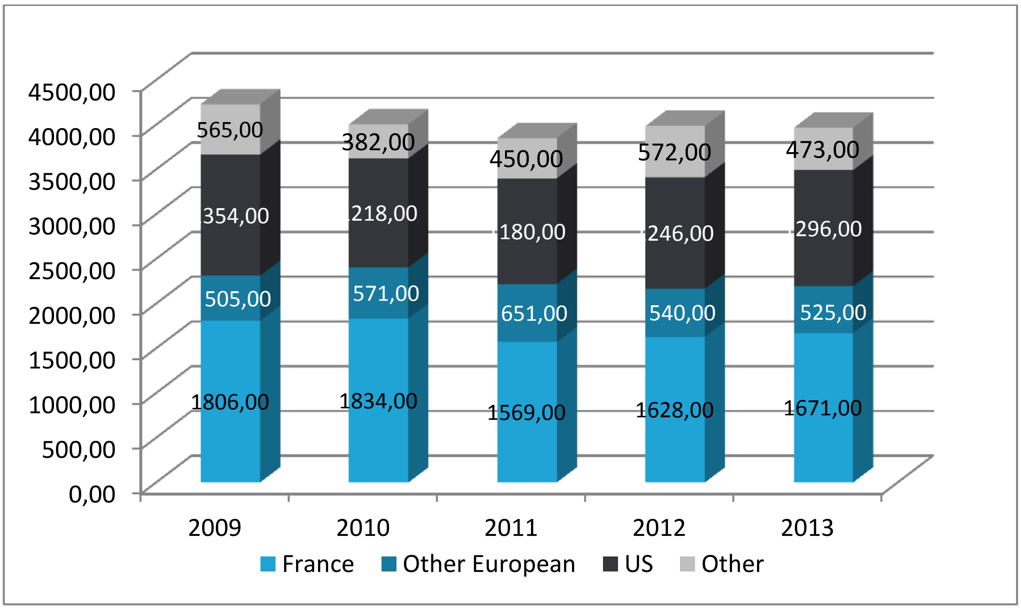
In hours



CNC, MEDIAMETRIE

100 CNC data on origin of TV and feature film animation by origin ● 2009-2013

In hours

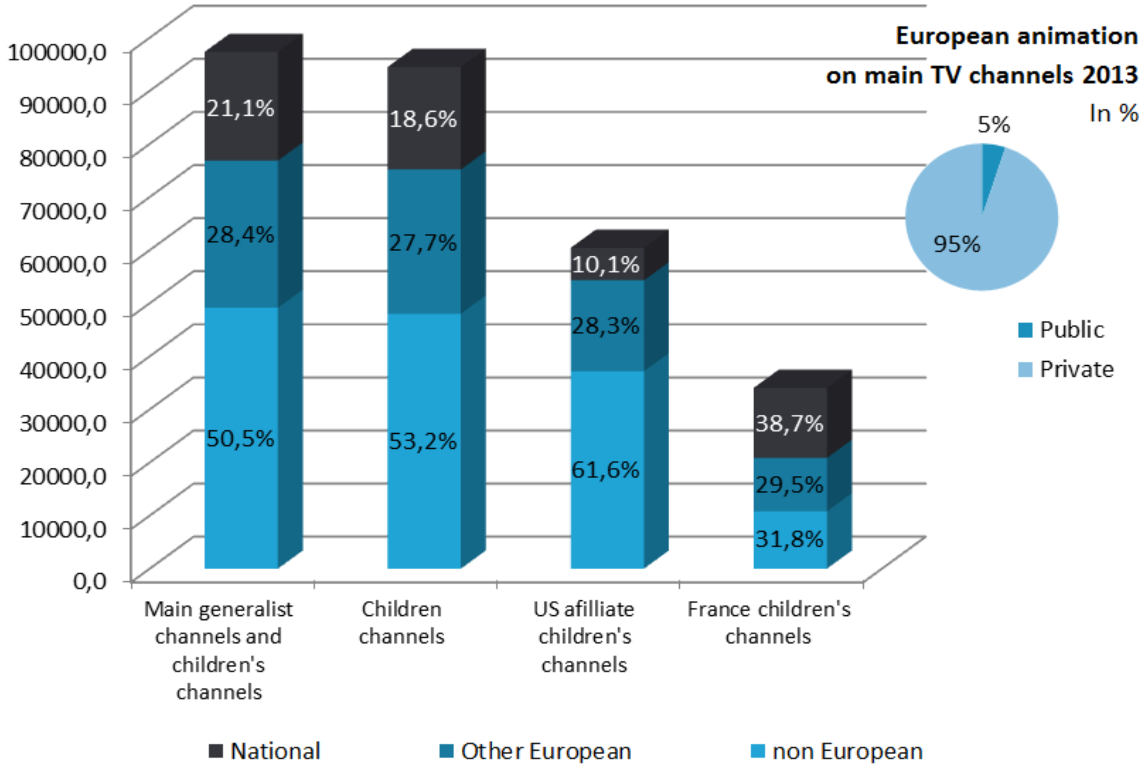


CNC, MEDIAMETRIE

Note: Based on TF1, France2, France 3, Canal+, France 5, M6.

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

In hours



ROVI INTERNATIONAL SOLUTIONS

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

1.2.4 Germany

TV landscape 2014

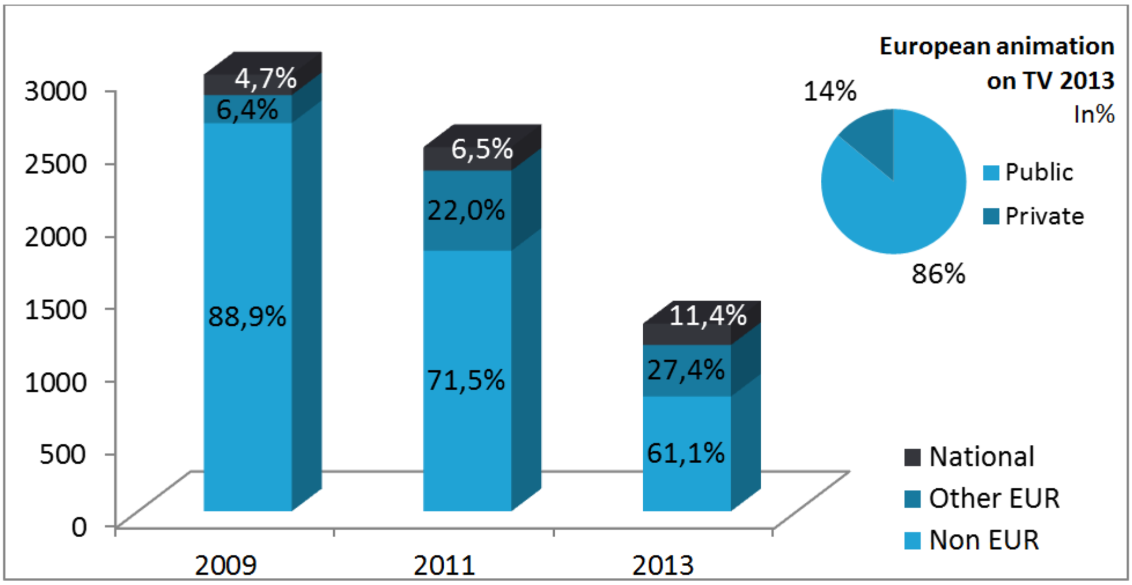
Television households	**38,5**	**million**			
Digital TV households	84%				
		Free to air		Public	Private
National children's channels	12	4		1	11
Children's channels targetting other countries	2				
Foreign children's channels available	7				
National film channels	22	0		0	22
Film channels targetting other countries	1				
Foreign film channels available	2				

FFA, ARD JAHRBUCH, OBS MAVISE

An analysis of the origin 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 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 channels listed above.

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

In hours

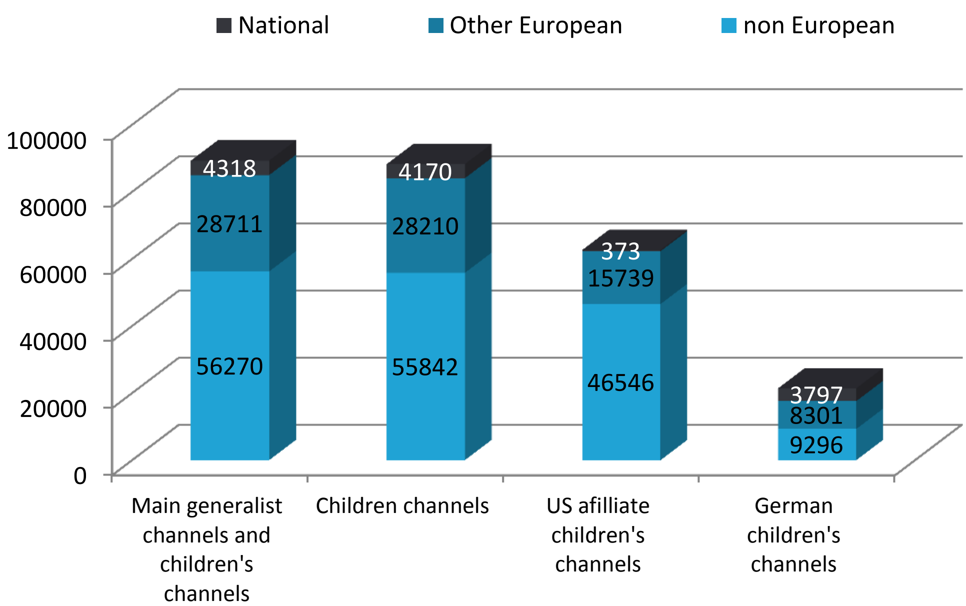


ROVI INTERNATIONAL SOLUTIONS, OBS MAVISE

Note: on the basis of 10 generalist and entertainment channels.

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

In hours



ROVI INTERNATIONAL SOLUTIONS, OBS MAVISE

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

1.2.5 Italy

TV lanscape 2014

Television households	**25,3**	**million**			
Digital TV households	100%				
		Free to air		Public	Private
National children's channels	27	5		3	24
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				

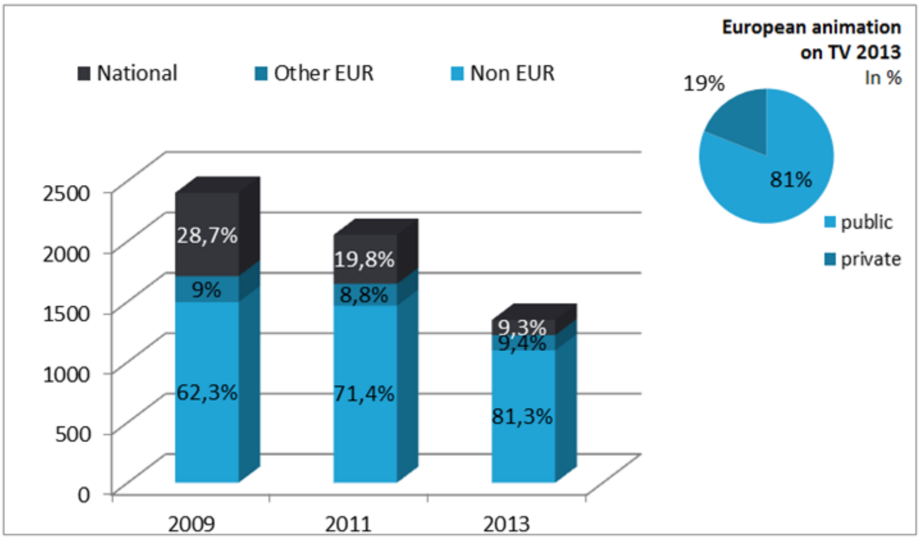
OBS MAVISE

The graphs 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, ROVI INTERNATIONAL SOLUTIONS, OBS MAVISE

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

In hours

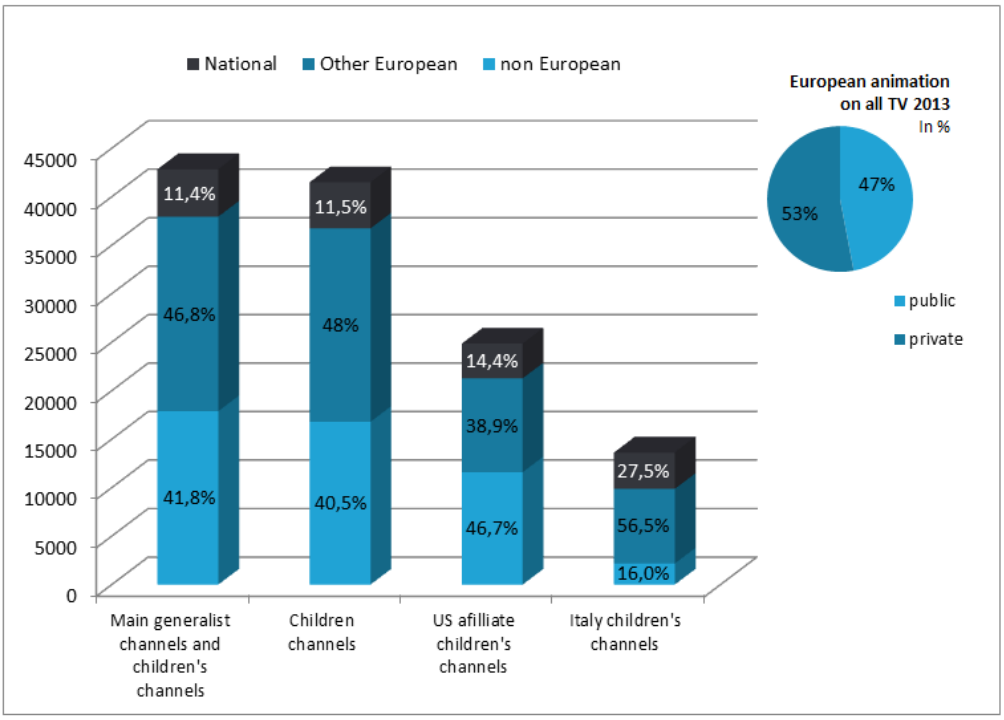


ROVI INTERNATIONAL SOLUTIONS

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

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

In hours



ROVI INTERNATIONAL SOLUTIONS

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

1.2.6 Spain

TV landscape 2014

Television households	**16,3**	**million**			
Digital TV households	99%				
		Free to air		Public	Private
National children's channels	15	4		2	13
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				

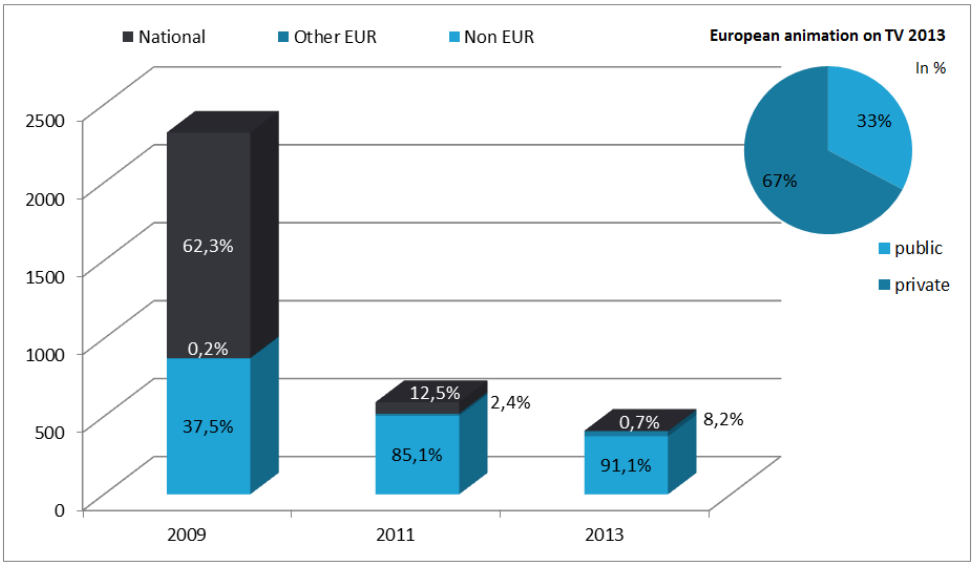
ICAA, HIS, ROVI INTERNATIONAL SOLUTIONS, OBS MAVISE

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. 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, ROVI INTERNATIONAL SOLUTIONS, OBS MAVISE

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

In hours

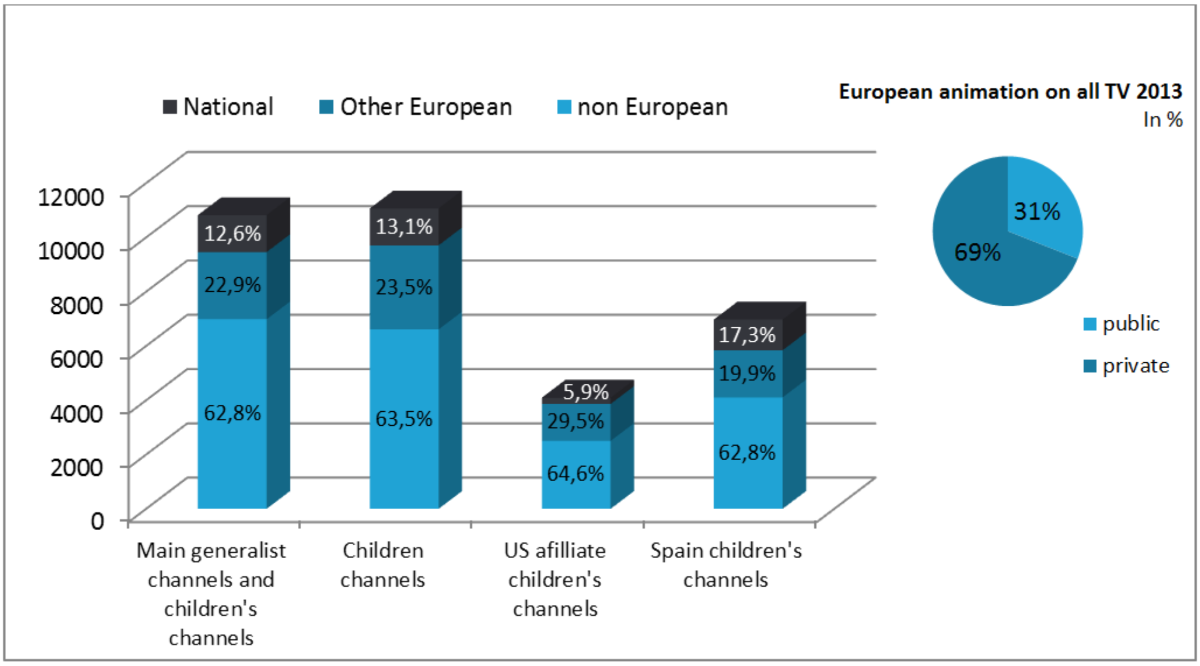


ROVI INTERNATIONAL SOLUTIONS

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

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

In hours



ROVI INTERNATIONAL SOLUTIONS

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

1.2.7 United Kingdom

TV landscape 2014

Television households	**28,1**	**million**			
Digital TV households	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				

OFCOM, ROVI INTERNATIONAL SOLUTIONS, OBS MAVISE

The United Kingdom is a major home of children's channels that are broadcast throughout Europe. Important national children's channels include CBBC, Cbeebies (BBC), CITV and the US affiliate channels[34]: Disney, Nickelodeon, Boomerang, Cartoon Network and Baby TV.

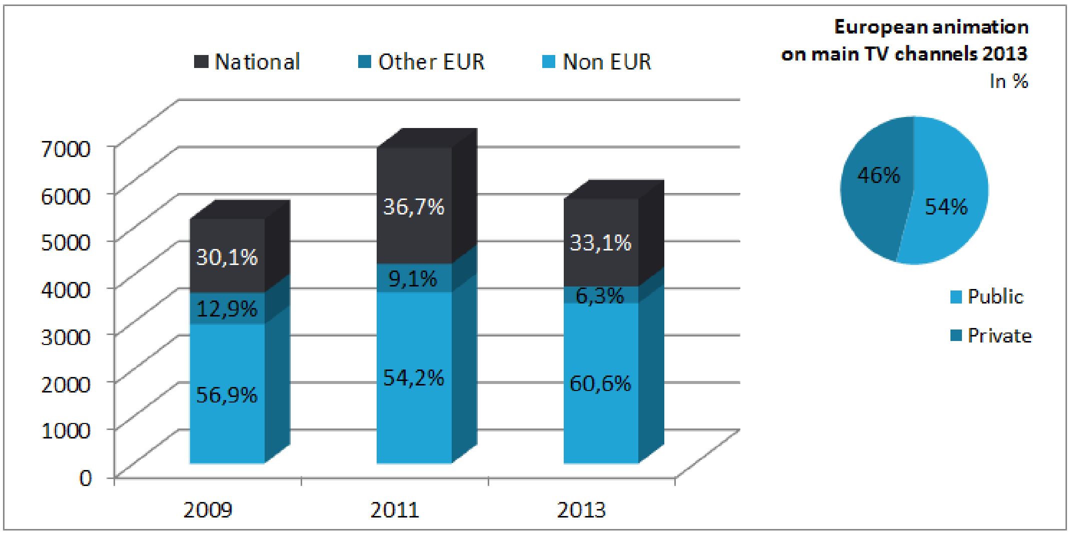
For the analysis of the proportions of animation on children's TV in the UK, data from ROVI is used. The ROVI sample is based on 19 generalist and entertainment channels and nine children's channels. The children's channels Pop! and Tiny Pop! are not included. The graphs on page 41 deal with the trends 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.

ROVI INTERNATIONAL SOLUTIONS, OBS MAVISE

[34] A US affiliate channel is defined as a channel whose parent company is a US Media Group.

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

In hours

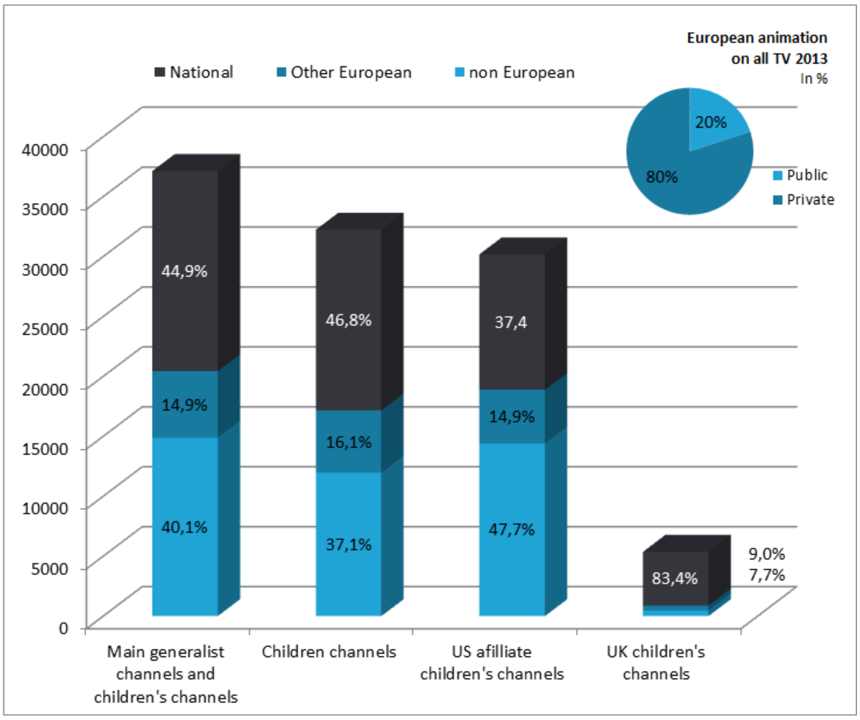


ROVI INTERNATIONAL SOLUTIONS

Note: on the basis of 19 generalist and entertainment channels.

109 United Kingdom: national, European and non-European animation on main TV channels and children's channels ● 2013

In hours



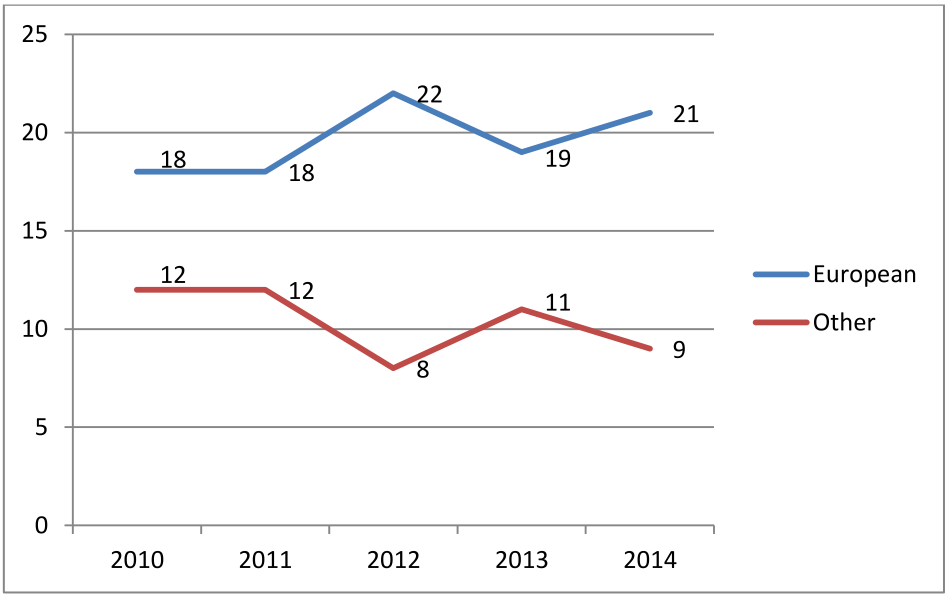
ROVI INTERNATIONAL SOLUTIONS

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

European programme performance

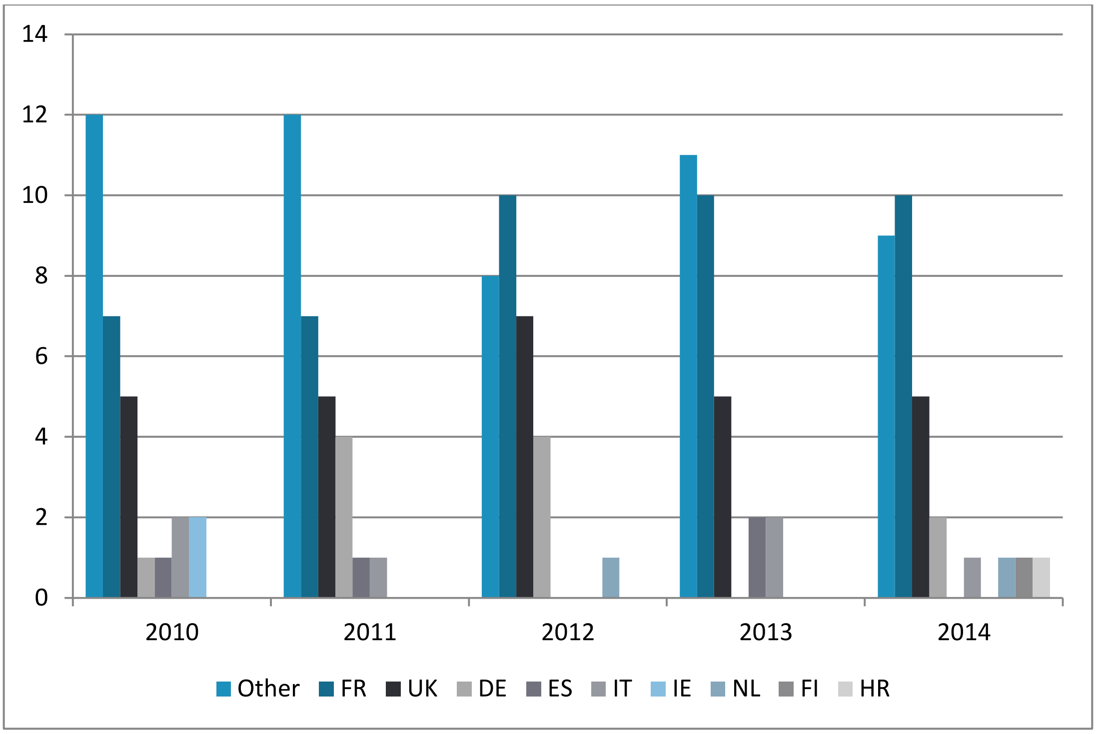
110 Animation programmes listed in MIP Junior Top 30 lists of most requested programmes, showing European compared to Other origin ● 2010-2014

In millions



REED MIDEM, OBS

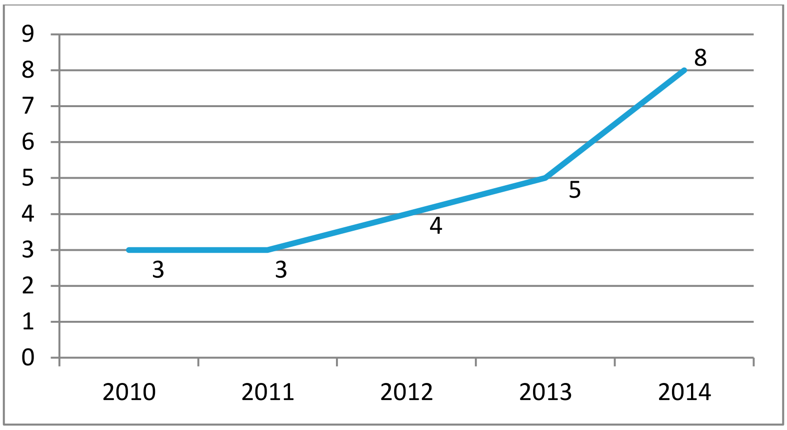
111 Animation programmes listed in MIP Junior Top 30 lists of most requested programmes, by country ● 2010-2014



REED MIDEM, OBS

112 Animation TV projects in Top 30 and supported by the MEDIA sub-programme of Creative Europe[35] ● 2010-2014

In units



CREATIVE EUROPE, REED MIDEM, OBS

Production volumes

France stands as the first European country with the highest number of TV animation hours produced, with 285 hours in 2015 for a total budget of 180.8 mEUR.

According to the BFI, 22 TV animation programmes were produced in the UK between April 2013 and March 2014, for a total budget of 36.8 m£.

In Italy, RAI co-produces 12 series per year; and this is basically the total TV animation produced.

In Spain, 5 TV series were produced every year in average in 2011[36]. Today, according to producers interviewed, no Spanish company can produce a TV series as a majority partner; there are 6-7 series being produced in minority co-production (or providing service) per year.

Germany had an average 50 hours of TV animation produced in 2008-2009[37]. No data was available to update this country's volumes, except for personal interviews with producers explaining that "German TV animation is residual".

Production costs

The following graphs are to be taken as non-official costs, provided via several combined sources: animation associations, institutions, Creative Europe's Desks, a questionnaire and personal interviews with producers. Data was not available for each European country.

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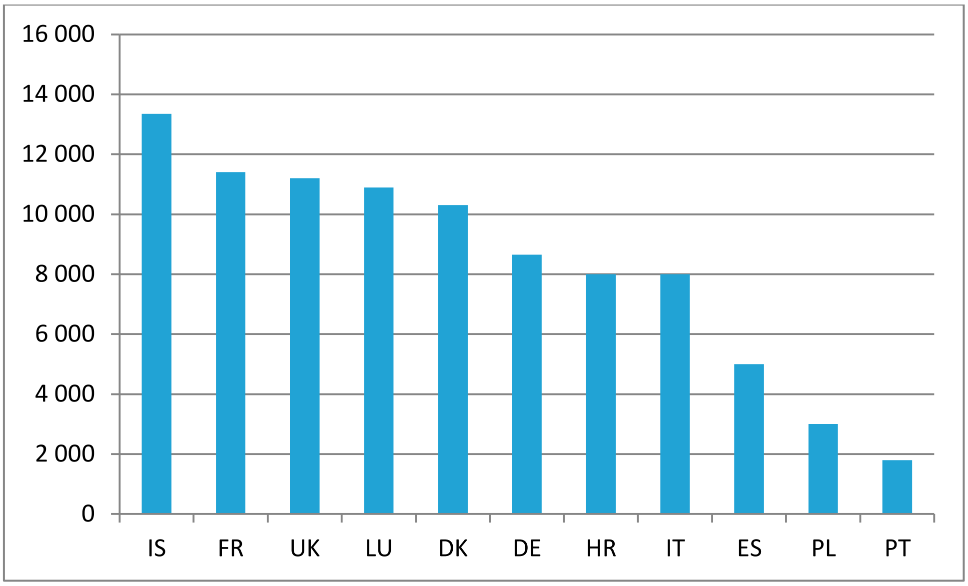
[35] In 2013 and 2014, three European programmes, supported by Creative Europe MEDIA sub-programme, were listed among the top five most requested programmes.

[36] Libro banco de la animación española, Diboos, 2012.

[37] Kino- und Fernsehproduktionen für Kinder und Jugendliche in Deutschland. Daten und Fakten 2005-2010, by Oliver Castendyk and Juliane Müller, Allianz Deutscher Produzenten Film & Fernsehen – HMS Hamburg Media School, 2011.

113 Average cost per minute of TV animation (in EUR



Source OBS

80% of the European series have an average cost per minute between EUR 5.000 to EUR 15.000, according to Cartoon statistics[38].

Iceland appears to be one of the most qualified-animators' producer in Europe. Framestore decided to open its European offices in Reykjavik in 2012 and some big successful features and SFX have placed the island in the European animation map. The expensive costs are to be read in relation to the common co-productions with US.

On the other hand, Spain presents the lowest costs for producing animation (2D digital and CGI) from the big five countries with less than half of the costs in France or UK.

[38] http://www.cartoon-media.eu/cartoon-movie-event/cartoon-movie-2016/press-7/report-2016.htm

European television licensors

114 Licensors (out of the top 150 global) with animation-related properties ● 2013[39]

Rank	Company	Sales USD M)	Properties sample (non exhaustive)	Country
1	The Walt Disney Company[40]	45 200	Frozen, Big Hero 6, Planes, Star Wars	US
4	Iconix Brand Group	13 000	Strawberry Shortcake	US
5	Mattel	9 000	Thomas & Friends[41], Monster High	US
6	Sanrio	6 500	Hello Kitty	JP
7	Warner Bros.	6 000	Looney Tunes, Tom&Jerry, ScoobyDoo	US
9	Nickelodeon	5 500	Sponge Bob, Teenage Ninja Turtles	US
10	Hasbro	5 060	Little Pony, Transformers	US
12	Rainbow	4 300	Winx Club	IT
17	Dreamworks Animation	3 300	Dragon, Madagascar, Postman Pat	US
27	Twentieth Century Fox Consumer Products	2 100	The Simpsons, Ice Age	US
28	Cartoon Network Enterprises / Turner CN 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	**BBC Worldwide**	**1 800**	**Sarah and Duck, Dino Paws**	**UK**
40	Giochi Preziosi Group	1 500	Gormiti, Puppy in my pocket, Dinofroz	IT
51	**Rovio Entertainment**	**1 100**	**Angry Birds, Stella**	**FI**
61	Entertainment One	934	Peppa Pig,	UK
66	Saban Brands	850	Julius Jr., Luna Petunia, Emojiville	US
67	**Fremantlemedia**	**800**	**Tree Fu Tom, Danger Mouse**	**UK**
69	**Lego Group**[42]	**650**	**The Lego Movie**	**DK**
76	**Studio 100 Group**	**500**	**Maya the Bee, Heidi, Vic the Viking**	**DE**
80	**ITV Studios Global Entertainment**	**400**	**Thunderbirds are Go**	**UK**
84	TOEI Animation Enterprises	380	Dragon Ball, Sailor Moon, Pretty cute	JP
89	Bromelia Produçoes	300	Galinha Pintadinha	BR
96	m4e Group	254	Mia and Me, Tip the Mouse	DE
99	**Mind Candy**	**250**	**Moshi Monsters, PopJam**	**UK**
103	**DHX Media**	**240**	**Caillou, Johny Test**	**UK**
105	Sony Pictures Consumer Products	225	Hotel Transylvania	US
113	Nelvana Enterprises	200	Beyblade, Franklin, Babar	US
123	**Aardman Animations**	**140**	**Shaun the Sheep, Wallace & Gromit**	**UK**
132	4K Media	120	Yu-Gi-Oh!	JP

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

[39] European companies are highlighted in bold.

[40] 11 of Walt Disney's franchises generate more than 1B USD each, globally and annually.

[41] Thomas & Friends (sold in 2012 by Hint Ent. to Mattel) is the No. 1 preschool toy license in the US, according to The NPD Group, and is present in over 185 territories and in 30 languages.

[42] In the fiest half of 2014 the LEGO Group became the world's largest toy company by market value, surpassing Mattel. Source: Wikipedia.

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 become 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[43]. All are now in the business of IPs and Brands rather than handling single titles. As shown above, 31 companies (including 13 European) with animation-related properties were in the Top 150 Global Licensors list in 2014[44].

IHS, REED MIDEM, LICENSE! GLOBAL, OBS

1.2.8 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[45].

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[46], 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.

[43] The Business of Children's Content, HIS, MIPCOM 2014.

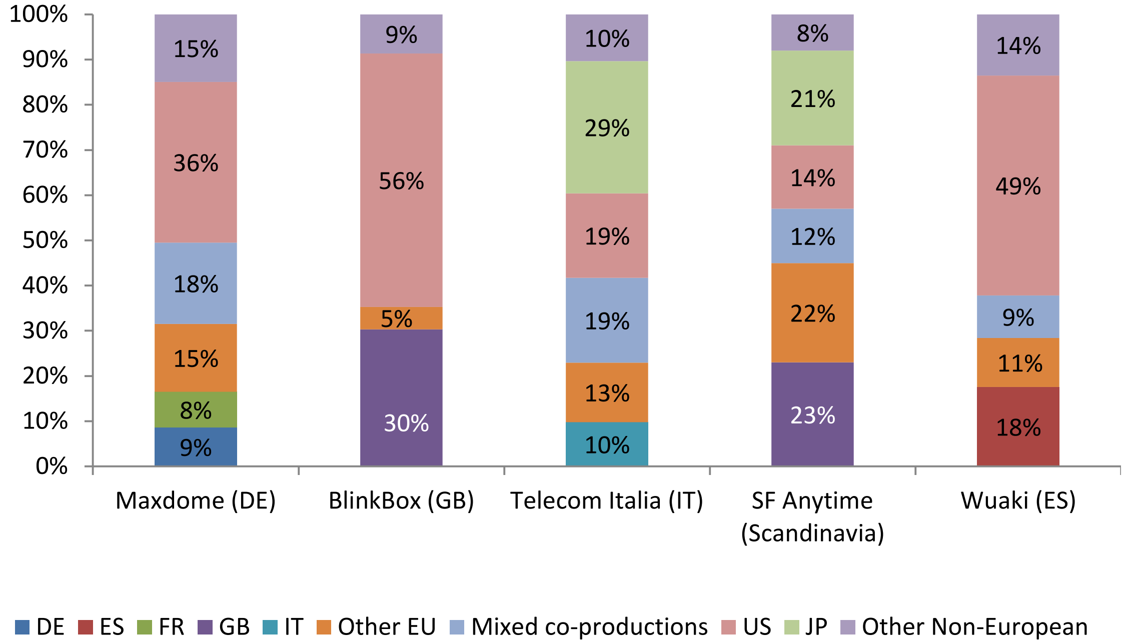
[44] License! Global magazine, May 2015.

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

[46] Variety, New York Times, Forbes, iKids/Kidscreen.com

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

115 Origin of TV animation in a sample of European VOD services ● October 2014



OBS ON ROVI DATA

2. The European animation industry in transition

- The measurement of the European animation industry is a challenge: there is no comprehensive data available to put a total value on the size of the European animation industry. The prolific and detailed data available for France is an exception, and the few national reports available are quite outdated.
- Already a globalised market, the animation industry witnesses the emergence of new Asian players moving from a statute of mere sub-contractors to a stature of co-producers. This represents both an opportunity for European producers to expand beyond the European market, but also a difficulty in retaining Intellectual property rights.
- The pre-financing of animation is under pressure: the major broadcasters' revenues are at best stagnating; they are challenged by multiple children channels which do not have the resources to significantly invest in original programing.
- International pre-sales and exports are increasingly needed to compensate for the decline of financing in each national market. Among audiovisual programmes, animation is already the category with the largest European circulation.
- As on-demand services are integrating more and more children's programming, emerging new internet players may also become significant new outlets for animation, but only in the medium term.
- Internet brings also new opportunities for producers and rights holders: distributing directly to the consumers, including with the view to strengthen the brands and therefore increase the appeal of programmes for TV channels; testing new formats and detecting new talents.
- In a transition context, building (or reviving) strong brands is more important than ever. Brands can be born outside of the traditional TV or toys domains, e.g. from games or applications. And partnerships around brands are increasingly established right from the development phase.
- The management of Intellectual property rights has become (one of) the key roles of producers. It requires specific skills and a certain level of scale. Broadcasters and producers, otherwise partners, may increasingly compete for the control of IPs.
- Animation has many opportunities to enlarge its audience, to teens and adults. Moreover, animation is an industrial know-how that can be applied in multiple industrial sectors.
- The level of investment in the development of new brands, the necessity of obtaining worldwide pre-sales or distribution deals, and the opportunity of relocating studios in Europe have increased the need for scale and therefore have led to a concentration process.

2.1 Overview: A transition phase

The changing geo-politics of animation

50 years ago, European animation companies were the service providers of US productions. 2D animators were much recognised, with some countries standing out like France, Spain Italy and several Eastern European countries. With time and public support (national and European support schemes having the objective of helping producers retain a larger proportion of their productions), European producers started developing their own ideas and IPs.

Europe then turned to Asia to outsource part of the animation of its productions. After competing for this service work, countries like Korea, China or Japan are today more interested in co-producing the programmes, and retaining some percentage of the properties. Today, the European animation targets the global marketplace, and as Ireland's Cartoon Saloon Paul Young defines it, the US, Korea and China are new markets for co-production and sales[47]. Of course, with their own specificities; for instance in China there is a quota of a maximum of 34 non-Chinese feature films in cinemas per year, which makes it extremely difficult to get distribution in the country, but if China co-produces, there is no quota. UK has a co-production treaty with China, but Ireland not yet. This represents both an opportunity for European producers to expand beyond the European market, but also a difficulty to retain Intellectual property rights.

In parallel, European fiscal incentives have had the effect of re-locating the animation processes in Europe, whose studios provide a higher quality at (almost) the same cost.

Threats on pre-financing

Animation production is a long and expensive business. The main difficulty is finding the way to finance in advance a very expensive production process that can take up to two or three years. And even if recoupment normally comes on first broadcasts by the pre-financing TV chanels, traditionally the benefits do not emerge until five years later.

As an example, UK's Astley Baker Davies original property "Peppa Pig", which is today a consolidated brand with near USD 1 billion worth of sales a year, was originated back in the 90s; Entertainment One (currently a Canadian company) started its international distribution only in 2007. Since then, over 200 episodes have been broadcast in 180 territories[48] and the brand is reported to have earned GBP 870 million by 2015[49].

Financing the production of TV animation is harder today due to several reasons related to less (and cheaper) commissioning from broadcasters, re-programing, the appearance of new platforms and more generally, the (beginning of the) change of business model.

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[47] Annecy's MIFA 2015 panel of experts *Focus on animation*.

[48] http://deadline.com/2015/09/entertainment-one-peppa-pig-astley-baker-davies-stake-1201560180/

[49] http://metro.co.uk/2015/02/05/12-cartoon-characters-who-are-making-more-money-than-you-5050646/

A) A decrease in public broadcasters' investment: It is commonly accepted in the animation industry that TV investment has decreased in the past five years. Red Kite's Ken Anderson is categorical: "Today it is almost unthinkable that CITV would pay an independent producer to make a programme (…) at the level of funding available less than 10 years ago"[50]. But this is not accurate for every European country; In Ireland, RTE announced in October 2015 the increasing of its investment in animation[51].
B) The difficulty of pre-funding: France's Gaumont Animation Pierre Belaish declared that "the cost of producing top-quality animation (…) is very high, while there are fewer and fewer pre-buys available", adding that it has become vital to secure "as many local terrestrial channels as possible, as well as a few high-quality pan-regional broadcasters"[52].
C) A decrease in first-runs, proportional to a rise in repetition of animation programmes (higher than for other genres).
D) The proliferation of networks did not offer an increase of the funding available, as smaller channels do not have the resources to invest in original programming
E) Private investors are not very attracted by the animation business model, which has a five-year to ten-years Return on Investment (ROI).

As a result, some of the biggest European outputs have suffered from the economic crisis of the past five years and "many companies have gone bust or struggled after an initial burst of success: Entertainment Rights, Moonscoop, Zinkia, etc."[53]

While broadcasters revenues are under pressure, and therefore also their capacity to invest in animation programming, emerging internet players may provide new outlets and contribute in the medium term to the funding of animation. But this transition is only beginning.

Building strong brands as a key success factor

In that context, producers and distributors need to create and exploit brands, IPs, because a unique programme does not recoup costs without a Licensing and Merchandising strategy; and this is only possible when your product is found on every window and platform, over a period of several years.

Producers therefore increasingly tend to secure partnerships right from the development phase: co-producers, broadcasters, distributors, licensors, etc. are offered the programme from the concept phase. But all partners must battle each other to retain a fraction of exploitation rights.

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[50] "A personal experience of animation policy in practice", by Ken Anderson, in: Children's Media yearbook 2015, edited by Lynn Whitaker and Beth Hewitt, The Children's Media Foundation.

[51] http://presspack.rte.ie/2015/10/14/rte-announces-increase-in-animation-sector-support-along-with-brand-new-rtejr-autumn-schedule-and-app-for-android-devices/

[52] "Where to next? A look at the challenges and opportunities of a market in transition" by Bob Jenkins, in: http://issuu.com/mipmarkets/docs/mipjunior_2015_preview, September 2015

[53] "The business of children's Content", by Tim Westcott and Anna Stuart, IHS Technology, TV Programming intelligence, December 2014

The need for strong brands also explains the rise of the TV series based on pre-existing properties, which come with a bigger potential audience and proved market potential: "in times of crisis, buyers favour the purchase of animated programmes based on a character, a well-known brand with built-in celebrity"[54].

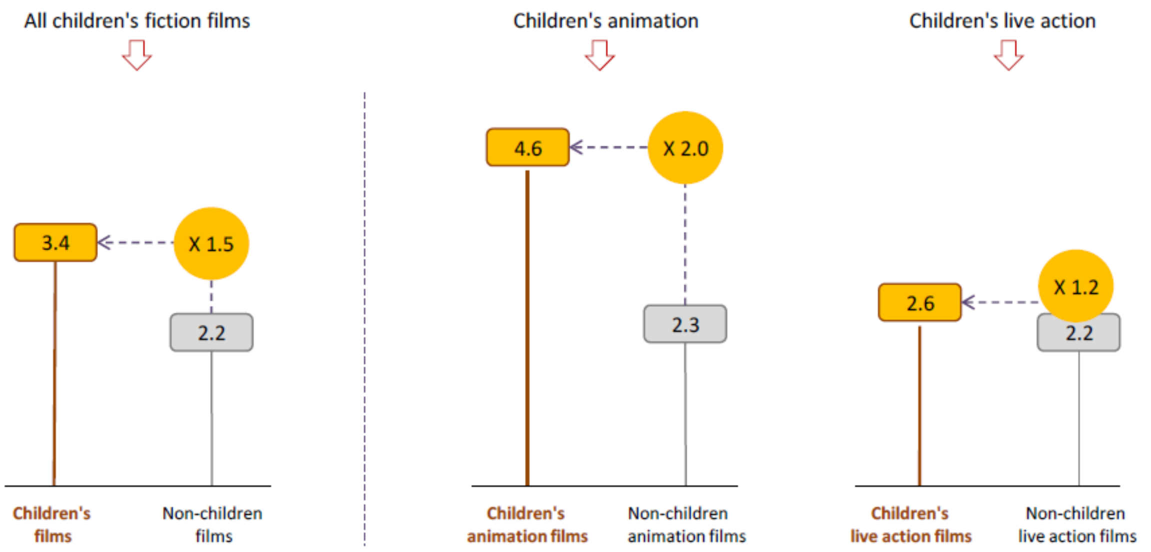
Circulation is a key asset of animation programmes

Whereas every national market suffers from the declining investments of broadcasters, combining resources from as many markets as possible becomes key.

Here, the good news, according to Cartoon is that "animation stays the best seller of the European audiovisual products: about a third of the series presented at Cartoon Forum were sold in more than 20 countries and 20 European series became blockbusters and were sold in over 100 countries, such as *64 Zoolane, Peppa Pig, The Triplets, The Jungle Bunch, The Hive, Minuscule*…"[55].

For film, 74% of children's animated features achieve a non-national release, and a comparison of the average territories of non-national release proves that children's animation films travel 1,5 times better than non-children's films, and twice as much as children's live action[56], as shown below.

Average non-national release markets of children's fiction films 2004-2013



Source: Audiovisual Media for Children in Europe, OBS

[54] CNC Results 2014.

[55] http://www.cartoon-media.eu/cartoon-forum/cartoon-forum-2015/press.htm

[56] "Audiovisual Media for Children in Europe. The theatrical circulation of European Children's films; television for Children", EAO for the Cinekid Conference, October 2011.

2.2 The challenges of measuring the European animation industry

There is no comprehensive data available to put a total value on the size of the European animation industry. The prolific and detailed data available for France is an exception, and the few national reports available are quite outdated.

The European Audiovisual Observatory has contacted all animation associations, national institutes and Creative Europe Desks to gather data at national level, with irregular results. The following section compares, as far as possible, the available values.

Employment

The following table provides employment figures for the few countries where they are available. No aggregated data are available at the European level.

	Employees		Animation companies
	2011	2014	
France		5046	106
Italy		762	81
Poland			40
Spain	5 150		50
UK	4 600	4 700	470

Source: OBS

Again, the most detailed data available comes from France's CNC. In 2014, 106 companies employed 5.046 people in the French animation industry.

In UK the number of employees has remained stable since 2008 with around 4.700 employees working for 470 companies.

In Italy, 81 companies are counted as producing animation and employing 762 people, in a Cartoon Italia internal report on the animation industry in 2015[57].

In Spain 2011 was a very good year for animation, and 5.150 employees in around 200 companies were included in an industry report from 2012. However, national producers estimate that these figures might have decreased by two or even three times after the crisis, with less than 50 companies still active[58].

Poland, the sixth largest territory in Europe, has 40 active companies working in animation.

[57] L'Industria dell'Animazione in Italia, Internal report by Cartoon Italia, 2015.

[58] Obs personal interviews.

Turnover

Here again there is no consolidated information on the global turnover of the animation industry available, and only a few national animation associations were able to provide figures in the course of this study. The following is a compilation of heterogeneous figures from several countries.

Animation in **France** corresponds to 6,9% of the investments made in cinema productions in the time span 2005-2014, all genres considered. Throughout the last decade, this percentage can vary from 3,3% (in 2007) to 13,5 (in 2008)[59].

According to Oli Hyatt (Blue Zoo), the value of the **UK**'s children TV animation production in a year equals GBP 100 M (it was only GBP 40 M the year before the introduction of the animation tax credit). The total revenue of the four largest animation companies in 2009 - HIT, Aardman Animation, Chapman and Chorioon - was GBP 246,7 M and total revenues related to animation were GBP 300 M in 2011 as outlined in Animation UK's report.

In Spain, the sector's White Book on animation (2012) estimated the size of the industy at EUR 300 M in 2011 (equivalent to 8% of all the audiovisual sector in Spain and to 0,04% of GDP). Over 65% of companies have a turnover of between EUR 0,5 M and EUR 2M[60].

In Ireland, the main animation companies annual turnover ranges from EUR 1M to EUR 15M+ and turnover has increased by 7,5% from 2013 to 2014 (Enterprise Ireland's Eileen Bell).

According to the Luxembourg Film Fund "with the help of public support, the annual average for financial participation of Luxembourg animation productions (features and series) is EUR 8,3 M (in coproduction) which means a total of EUR 24.843.00 for the period 2012-2014".

In Croatia, Adriatic Animation's Drasko Ivezic estimates that the turnover for average studios at EUR 500.000. There are 3 such studios like this in Croatia, producing an average of 4 short films and 4 adverts per year.

Investment in animation / expenditures / revenues

"The animation programme sector in the UK generated GBP 171.1 M in GVA in 2013, supported 4,700 FTEs, and provided GBP 52.0 M in tax revenue to the UK Exchequer"[61].

In Spain, still based on 2011 data, the animation sector generated EUR 306 M and a fiscal impact on the Spanish economy of EUR 67 M; the multiplying factor of investment in national animation projects is EUR 2,1 generated per euro invested"[62].

And in Ireland, according to IBEC, "the expenditure for animation in 2010 amounted for 10% of the overall expenditure of the audiovisual sectors. The total output for 2010 was EUR 29.7 M, of which

[59] CNC Results 2014

[60] Libro blanco de la animación española, Diboos, 2012.

[61] BFI, The economic contribution of the UK's film, high-end TV, video games and animation programme sectors, February 2015.

[62] Libro blanco de la animación española, Diboos, 2012.

Irish expenditure amounted to EUR 20 M"[63]. "The Irish animation sector has increased by 91% in value in terms of production spend, from EUR 57,6 M in 2009, to EUR 110 M in 2011. In terms of the Irish spend element of the total, it grew from EUR 25,1 M in 2009 to EUR 48,1 M in 2011, a 39% compound annual growth rate"[64].

Exports

Animation represented 34,2% of total audiovisual exports in France in 2013. Exports are defined by the CNC as the addition of "sales of French films and television programmes abroad and foreign investments in the form of majority or minority French co-productions"[65].

"In 2013, exports of **French TV animation** have increased for the fifth year in a row, reaching EUR 46,9 M (+ 6,7% compared to 2012). Foreign presales in French TV animation productions dropped by 12,3% to EUR 45,6 M in 2014. The main exportation territories for TV animation are Western Europe (61,8 %), North America (10,5%), Asia and Oceania (9,2%) and Central and Eastern Europe (8,3%)"[66]. And for feature films: "in 2014, 7 new French animation films were released abroad and 38 films were grossing in international movie theatres. French animation features grossed EUR 3,46 M abroad in 2014. Over the period 2005-2014, French animation films earned the 45.6% of their receipts abroad. 13 French animation films sold more than one million tickets abroad over a 10 year span"[67].

90% of turnover in **Irish animation** companies is attributed to exports according to Enterprise Ireland, and "100% of the output of the Irish animation sector is exported internationally and bought by overseas broadcasters and distributors"[68]. Animation Ireland has also accounted EUR 74,7 M of foreign direct investment that was attracted to Irish animation companies in 2011.

In Spain, in 2011, 70% of productions involved an international co-producer. 50 to 70% of Spanish producers would outsource services to other Spanish or foreign companies. And between 30 and 45% of companies offer services to other countries (like Italy, UK, US, Qatar, Mexico or France). On the other hand, 62% of Spanish producers export their products, generating 38% of their revenues from international sales (a percentage that can reach 70% in some cases)[69].

[63] IBEC, Audiovisual Federation, Film and TV production in Ireland, 2011.
[64] Animation Ireland, review of Section 481 Film relief. Submission to the Department of Finance, August 2012.
[65] CNC Results 2014.
[66] CNC Results, 2014.
[67] CNC Results, 2014.
[68] Animation Ireland, review of Section 481 Film relief. Submission to the Department of Finance, August 2012.
[69] Libro blanco de la animación española, Diboos, 2012.

2.3 The impact of internet on distribution

The past history of animation broadcasting has gone through two distinctive periods. First, animation was programmed in generalist channels, it was the classical model. In the 90s, animation moved to niche, specialised children's channels.

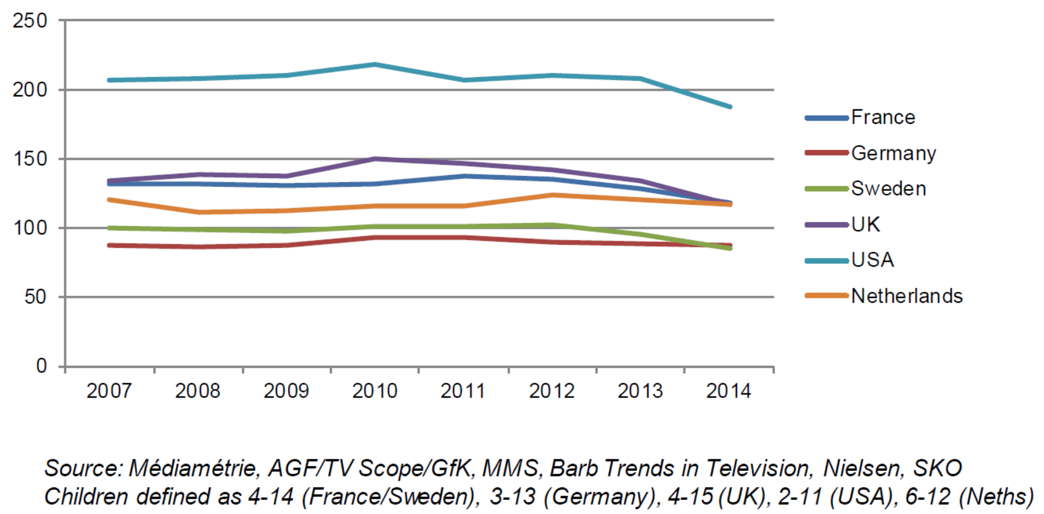
Today, we are seeing the appearance of a third period with the moving of animation contents to the Internet in platforms and SVOD channels specialised in kids' contents. Still, there are more than 400 children's channels in the World[70] and TV remains the dominant medium for watching animation, regardless of growing number of connected devices owned by children and "98% of children (5-15) watch TV, virtually the same as in 2012 in the UK"[71].

According to Cartoon: "The role of broadcasters, both public and private, remains key in developing and financing European animation, together with an interest from new players such as digital platforms like Amazon, Netflix or EuroVOD"[72]. The truth is that linear TV and new channels are currently coexisting, in a transition period that is defining the future business model.

Linear viewing declines, but digital brings new outlets, including for TV channels

Among the five biggest European countries, all but Italy saw a decline in traditional TV viewing: "below historic levels" in UK; "first decline in five years" in France; "a fall for the second consecutive year" in Germany and "a fall in traditional broadcast" in Spain[73].

116 Average daily TV viewing by children in UK (minutes)



Source: Children's on demand content comes of age, MIP Junior – IHS white paper 2015

[70] "The business of children's Content", by Tim Westcott and Anna Stuart, IHS Technology, TV Programming intelligence, December 2014

[71] Ofcom, Children and Parents: Media Use and Attitudes Report, October 2014.

[72] http://www.cartoon-media.eu/cartoon-forum/cartoon-forum-2014/press.htm

[73] "Cross-platform Television viewing time Consumers embrace on-demand TV in the US and Europe", by Fateha Begum, IHS Technology, MIPTV, April 2015

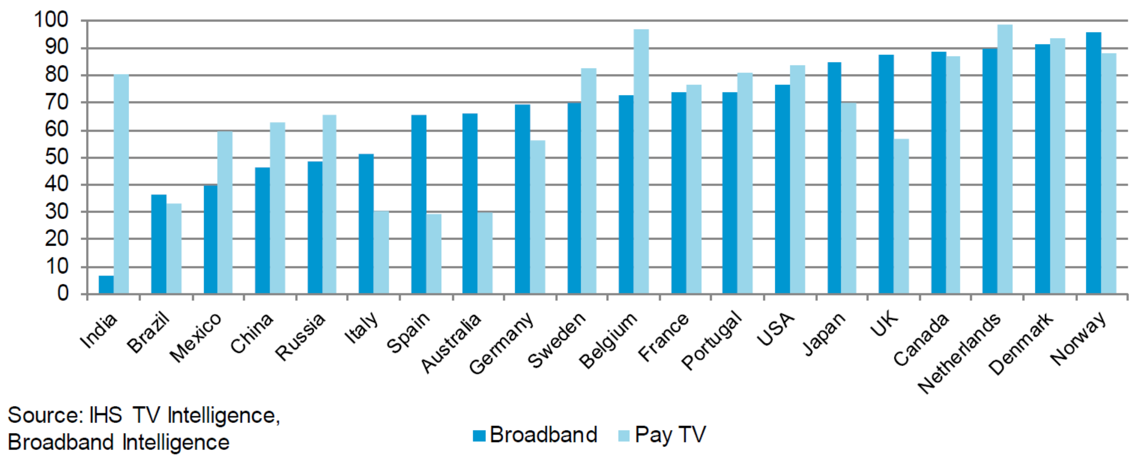
On the other hand, there seems to be a problem of under-measurement of the viewing of programmes on all platforms[74].

Digital TV is a second window that lives together with the TV set, and broadcasters are turning to internet to offer more than plain catch-up of their shows: "digital is the next evolutionary step for media: an enrichment of our experiences of content rather than a replacement. (…) As we explore opportunities on other platforms, we are starting to develop original content for our YouTube channels too. CBeebies, in particular, has seen growing success on YouTube through launching bespoke brand-related content"[75]. Spanish public broadcaster TVE innovated its offer in 2013 by creating a tablet with a dedicated app for its kids' channel Clan, which was highly praised in the sector[76].

UK's ITV chief executive Adam Crozier has stated that the broadcasters are still "in an incredibly strong position. As long as TV companies invest heavily in great new original content, they will be successful. Content will be key"[77].

The arrival of digital platforms is however a reality in Europe, with four of the five biggest European countries (except France) counting "more households (that) have access to high speed internet devices than pay TV. These broadband households are being courted by a new wave of online streaming services"[78]. In France, "catch-up TV services cannibalised paid-for VoD content"[79].

117 Pay TV and broadband penetration in UK, end 2014 (%)



Source: Children's on demand content comes of age, MIP Junior – IHS white paper 2015

[74] http://www.todotvnews.com/news/Cinco-visiones-sobre-presente-y-futuro-de-la-TV.html

[75] "Taming the future – Perspectives on the Digital World from BBC Children's", by Daniel Bays and John Haywood, in: Children's Media yearbook 2015, edited by Lynn Whitaker and Beth Hewitt, The Children's Media Foundation.

[76] http://www.audiovisual451.com/yago-fandino-director-de-clan-apostamos-por-la-vertiente-interactiva-en-los-proyectos-de-animacion-y-eso-diferenciara-al-sector-espanol-del-resto-del-mundo/

[77] http://variety.com/2015/tv/news/itv-adam-crozier-content-deals-mipcom-1201610539/

[78] "Children's on demand content comes of age", by Tim Westcott and Anna Stuart, in: MIP Junior – IHS white paper, http://www.my-mip.com/RM/RM_MIPWORLD/2015/resource-centre/pdf/miptv-mipcom-ihs-children-on-demand-content-white-paper.pdf?v=635735992882582590, August 2015

[79] "Cross-platform Television viewing time Consumers embrace on-demand TV in the US and Europe", by Fateha Begum, IHS Technology, MIPTV, April 2015

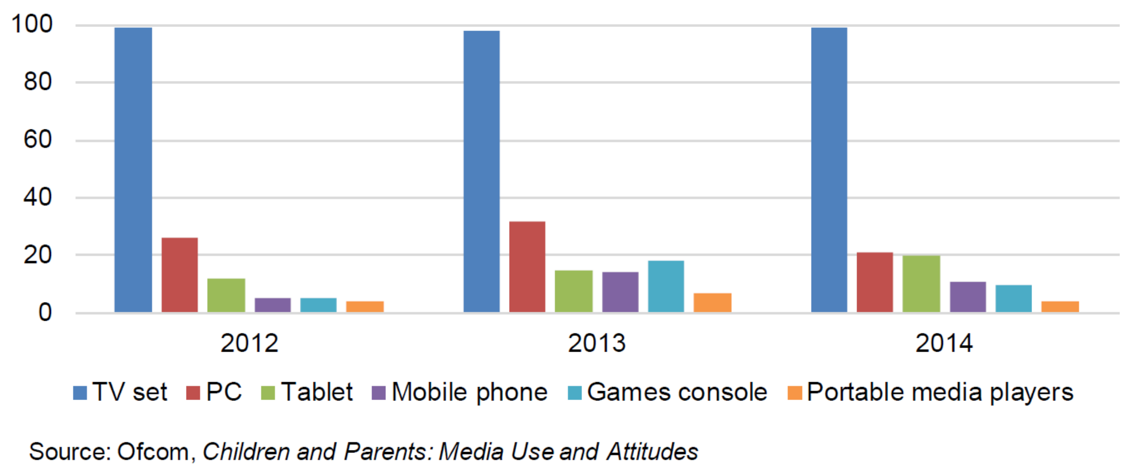
Children's programming is one of the key genres for on-demand services.

Capturing young audiences is a common goal for content providers: "broadcasters and digital platforms are looking for valuable original content to win market share and drive subscriptions" said Rainbow's Iginio Straffi[80]. From all genres, "children's content is a key driver of on demand offerings"[81]. Platforms started acquiring children's content as a way to attract families to subscribing to their services, because parents are managing kids' access to online content (90% of parents declared they would mediate in their child's access to the internet in UK[82]). Netflix opened its children's dedicated page in 2011, mainly to retain the loyalty from a large part of the subscribers[83]. Today, to encourage loyalty in the global battle for customers, platforms are targeting the whole family, the new trend is to acquire teen/ tween content too, a target audience described as under-served[84].

Actually, kids prefer on-demand content at an even higher level than adults, since they are not constrained by the strict programming of linear broadcasters. They prefer streaming TV (they want to watch what they chose and when they chose), but they "still choose TV set over phones"[85].

Consumption of TV animation is growing on devices other than TV: "children are using tablets, laptops, smartphones, iPod touches and handheld games devices, so owners of children's brands and/or shows know they need to take them to those platforms"[86].

118 Devices ever used by children aged 5-15 to watch television programmes at home in UK (%)



Source: Children's on demand content comes of age, MIP Junior - IHS, October 2015

[80] "Where to next? A look at the challenges and opportunities of a market in transition" by Bob Jenkins, in: http://issuu.com/mipmarkets/docs/mipjunior_2015_preview, September 2015

[81] "The business of children's Content", by Tim Westcott and Anna Stuart, IHS Technology, TV Programming intelligence, December 2014

[82] Ofcom, Children and Parents: Media Use and Attitudes Report, October 2014.

[83] http://www.bloomberg.com/news/articles/2015-08-14/why-hbo-netflix-and-amazon-want-your-kids

[84] http://variety.com/2015/digital/news/netflix-smosh-the-movie-streaming-exclusive-1201577671/ and http://variety.com/2014/digital/news/amazon-buys-teen-wolf-exclusive-streaming-rights-from-mgm-1201110481/ and http://www.nytimes.com/2015/08/25/business/netflix-to-add-films-and-tv-series-for-teenagers.html?ref=media&_r=2

[85] http://blogs.wsj.com/cmo/2015/08/11/kids-prefer-streaming-tv-but-still-choose-tv-set-over-phones-says-pwc-report/

[86] http://www.theguardian.com/technology/appsblog/2012/oct/08/digital-kids-brands

Children's access to a tablet computer at home has increased in the United Kingdom from 51% to 71% for 5-15s since 2013, but TV is still the number one device used, as seen in the graph above[87].

"On demand has proved a hit with consumers, with children's programming one of the most successful genres"[88]. In UK, the biggest Pay TV platform (Sky TV) "has no linear children's TV channels or original programming of its own, [but] claimed to be 'the best entertainment service for children and their parents' in the UK"[89].

Digital platforms: a new source of financing?

Netflix and Amazon continue to announce their investment in local European series: "Netflix has already energised the market in France, they're eager to buy local content," said Pierre Belaisch, managing director of Gaumont Animation. "Netflix and other multi-territory digital platforms can buy non-exclusive second- and third-window rights. And those deals can prove crucial because they help us cover the 5% to 10% gap we're often left with to complete the financing on a show"[90]. This would come to replace the cut into the DVD sales[91].

Those European producers who have signed the first deals with platforms like Netflix, Amazon or Hulu do praise its advantages. Some even say that platforms pay as much money –or good money- as traditional broadcasters:

- Italian Rainbow's Iginio Straffi: "(At MIPCOM 2015) we will also be presenting Winx Club WOW, the new Winx Club spin-off co-produced with Netflix, to be released during mid-2016"[92].
- Amazon in early 2015 green-lit a series from Ireland's Brown Bag Films (bought in August 2015 by Canadian 9 Story): "The Stinky & Dirty show", now in production. Brown Bag's Cathal Gaffney has declared to be "delighted to work with Amazon. (…) We are only starting to scratch the surface of the OTT (Over-the-Top) business"[93].
- Germany's Ulysses Emely Christians defined the deal with Google US for their feature "Ooops Noah is gone" as good money for a one month exclusive buyout, and much more now that DVD income goes down[94].
- Netflix has also picked Ireland's Cartoon Saloon "Puffin Rock" and the company had previously sold their Oscar ® nominated feature "The secret of Kells" on the service[95].

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[87] Ofcom, Children and Parents: Media Use and Attitudes Report, October 2014.

[88] "Children's on demand content comes of age", by Tim Westcott and Anna Stuart, in: MIP Junior – IHS white paper, http://www.my-mip.com/RM/RM_MIPWORLD/2015/resource-centre/pdf/miptv-mipcom-ihs-children-on-demand-content-white-paper.pdf?v=635735992882582590, August 2015

[89] "Children's on demand content comes of age", by Tim Westcott and Anna Stuart, in: MIP Junior – IHS white paper, http://www.my-mip.com/RM/RM_MIPWORLD/2015/resource-centre/pdf/miptv-mipcom-ihs-children-on-demand-content-white-paper.pdf?v=635735992882582590, August 2015

[90] http://variety.com/2014/tv/markets-festivals/netflix-and-amazon-energize-europes-toon-industry-1201314001/

[91] http://www.theguardian.com/tv-and-radio/2015/aug/15/sesame-street-hbo-streaming-killed-saved

[92] "New marketplace, new opportunities", in: http://issuu.com/mipmarkets/docs/mipjunior_2015_preview, September 2015

[93] Obs personal interviews.

[94] Obs personal interviews.

[95] http://www.irishtimes.com/business/media-and-marketing/netflix-picks-up-irish-based-animation-puffin-rock-1.2237697 and http://tbivision.com/news/2015/06/four-original-kids-series-for-netflix/440661/

Those producers who haven't had access to this source of finance are more prudent, even skeptical:

- Jim Henson's Richard Goldsmith claims that "network television remains the biggest single generator of both revenue and exposure for kid's content"[96].
- UK's Novel Entertainment's Mike Watts says "it's a new and welcome opportunity if you are able to come to an agreement that is satisfactory for your existing partners in broadcast and home entertainment"[97].
- Pierre Belaisch (Gaumont Animation) sees platforms as "important players of the future (…) for projects with big IPs, with major recognition values"[98].
- UK Snapper Productions' Ben Butterworth said that "internationally, there are a lot more outlets wanting to commission and buy content, but the money they have on offer is not always proportionate to the cost of production"[99].

The old business model and the new business model are cohabiting and looking for a new equilibrium, but it seems that platforms' contribution to producers' revenues is not capable, today, of improving or even equaling the linear broadcasters' investments.

Moreover, BRB's Carlos Biern expressed his concern in Annecy's MIFA panel 'Focus on animation' in June 2015: "although over 40% of Youtube kids contents are of European origin, the online distribution in Europe is already handled by US companies like Netflix or Amazon". Even so, four new online video services dedicated to children appeared in Europe in 2014 (Hopster TV in UK; GulliMax, CanalPlayKids and Ludo – France TV – in France), and another four in the first semester of 2015 (TFouMax in France; CBeebies UK for Latin-America; myKIDIO and Super RTL's Kividoo in Germany)[100]. "Skepticism about advertising has also contributed to the rise of niche subscription services for kids" as opposed to Youtube or other similar sites[101].

Direct distribution on the Internet: an opportunity?

Content producers are looking to build a direct relationship with consumers through the internet. Disney announced in October the launch in November of "a subscription streaming service in the UK. (…) Disney will roll out the service across Europe next year, with the aim of launching in France, Spain, Italy and Germany"[102]. But it will compete directly with the many other platforms that offer

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[96] "Where to next? A look at the challenges and opportunities of a market in transition" by Bob Jenkins, in: http://issuu.com/mipmarkets/docs/mipjunior_2015_preview, September 2015

[97] "Digital takes custody of the kids", by Andy Fry, in http://issuu.com/mipmarkets/docs/miptv_2015_preview , March 2015

[98] "Where to next? A look at the challenges and opportunities of a market in transition" by Bob Jenkins, in: http://issuu.com/mipmarkets/docs/mipjunior_2015_preview, September 2015

[99] "Where to next? A look at the challenges and opportunities of a market in transition" by Bob Jenkins, in: http://issuu.com/mipmarkets/docs/mipjunior_2015_preview, September 2015

[100] "Children's on demand content comes of age", by Tim Westcott and Anna Stuart, in: MIP Junior – IHS white paper, http://www.my-mip.com/RM/RM_MIPWORLD/2015/resource-centre/pdf/miptv-mipcom-ihs-children-on-demand-content-white-paper.pdf?v=635735992882582590, August 2015

[101] http://www.bloomberg.com/news/articles/2015-08-14/why-hbo-netflix-and-amazon-want-your-kids

[102] http://variety.com/2015/digital/global/disney-to-launch-subscription-streaming-service-in-u-k-1201623079/ and http://www.wired.com/2015/11/disney-is-finally-getting-that-apps-are-the-future-of-tv/

their contents plus many other titles for the same price. This strategy, in any case implies controlling a large catalogue of strong branded content.

The availability of content on the Internet can also contribute to the marketing of the brand: “Youtube is not just interesting as a content platform, but also as a form of marketing”[103]. Zodiak Kids Studio’s Michael Carrington says that producers are “thinking earlier and earlier about how we can develop stories across TV, website, apps, games – any digital platform. The challenge for companies is to ensure they have the right expertise, so they are capable of creating both a long-form TV script and an app”[104].

For their direct-to-consumer distribution, content producers have the choice between:

- Creating their own digital platforms: Finland’s Rovio Entertainment launched its own video-streaming platform ToonsTV in 2013 for the Angry Birds series, and that same year began acquiring third-party content. The platform hosts more than 30 channels of free, on-demand video content and original scripted animated series[105];
- Creating a brand page on large digital platform: Pocoyo’s page on YouTube[106];
- Using specific children’s targeted platforms: UK’s Hopster[107]*;*
- *Or combining these tools together.*

Still, Internet remains a complement rather than a substitute to distribution on TV. At the 2015 Cartoon Forum Toulouse, 58% of projects pitched were cross-media projects: “the TV series continue to adapt to their audience and offer interactions through other media (tablets, mobile phones, video games, websites, etc.)”[108]. Still, some producers prefer to concentrate on their business – producing minutes of animation – and leave distribution tasks to specialised partners.

Discoverability is key

This rush towards omnipresence brings a new difficulty, discoverability: audiences need to discover your product, and this is very difficult in a saturated market. Producers need new digital marketing tools to make their content viral and profitable: “The viewing experience has changed, and all along the value chain, broadcasters, financiers, producers and distributors have re-focused their activities to integrate new online routes to expand their brands and make sure kids find them”[109].

Zodiak Kids Studio’s Michael Carrington adds: “We are always mindful that even young children have access to a huge range of content across multiple devices and platforms. The competition to engage them is fierce and this means that the big challenge facing us as producers is making your content accessible and easy to find. (…) Taking a coordinated approach to the promotion of our brands and finding new ways to help our audiences interact with them makes sense”[110].

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[103] “Digital takes custody of the kids”, by Andy Fry, in http://issuu.com/mipmarkets/docs/miptv_2015_preview , March 2015

[104] “Digital takes custody of the kids”, by Andy Fry, in http://issuu.com/mipmarkets/docs/miptv_2015_preview , March 2015

[105] http://kidscreen.com/2015/10/01/rovio-launches-toonstv-app/?utm_source=newsletter&utm_medium=email&utm_campaign=rovio-launches-toonstv-app&_u=y10oxbBczy0%3d

[106] https://www.youtube.com/user/pocoyotv

[107] “A playroom for kids and a safety for parents”, www.hopster.tv

[108] http://www.cartoon-media.eu/cartoon-forum/cartoon-forum-2015/press.htm

[109] http://licensingmadein.com/cartoon-digital-creating-entertainment-for-connected-screens/

[110] “Where to next? A look at the challenges and opportunities of a market in transition” by Bob Jenkins, in: http://issuu.com/mipmarkets/docs/mipjunior_2015_preview, September 2015

You need internet audiences to find your content and select it from the overloaded digital market, and then you need them to like it, share it and recommend it, because there is a strong competition. "There's good news, though, if you're lucky enough to get found and adopted. Kids engage more deeply than ever with favourite characters, stories and brands. They'll follow you across platforms, consume your content voraciously, and share it with others"[111].

This also raises the question of the release windows of the programmes. In the past the logical distribution order would be to start exposing your show on TV (Pay TV, then Free TV), HV, SVOD and ending in the internet. Today, TV has lost the mission of validating a brand or a show, and even its exclusivity: every partner wants a part of the pie – meaning the top successful brands – and the most important shows find their way to be present in every possible window.

Internet to showcase and detect talents

Internet is a new support for creativity: accessible, free, and innovative. Some authors and small independent producers have turned to the internet as a showcase of their products (webseries, games). And the Web is more than a way to distribute programmes, as distributors, broadcasters and platforms go to the internet to find those new talents, the potential new brands[112].

Does digital favour the detection of talent? It seems at least to shorten the steps. Pukeko's Baynton: "the kids' audience is passionate about consuming new and different content, but the commercially led processes at big studios do not always allow them to explore new ideas in the same way as small studios. Digital media is giving creatives a way to bypass the gatekeepers and that's exciting for the industry"[113]. In UK, Wildseed defines itself as a "next-generation media company which enables emerging talent to create (…) new IPs by investing directly into the development and production of their ideas"[114].

2.4 Animation as the management of IP

Every animation project is a potential new successful IP, animation being a favourable ground for brands. Nevertheless, this is easier for TV series than for animated features, because it takes a very long time to construct a Brand, and theatrical films have a more limited presence in media.

Digital as a new source of brands

Historically, ideas for animation programmes would be taken from publishers' classic books, comics or magazines. Today, new Brands can come from anywhere: videogames, the internet, toys…, etc. and it is more and more common to co-produce with toy masters or licensors[115]. As put by Hasbro's

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111 http://kidscreen.com/2015/09/17/content-distribution-and-discovery-the-royal-family/?utm_source=newsletter&utm_medium=email&utm_campaign=content-distribution-and-discovery-the-royal-family&_u=N4CP65CvucA%3D

112 http://variety.com/2015/digital/news/internet-serves-as-spawning-ground-for-emerging-animators-1201449283/

113 "Digital takes custody of the kids", by Andy Fry, in http://issuu.com/mipmarkets/docs/miptv_2015_preview , March 2015

114 Catalogue: http://cartoon-media.be/cartoon-masters/cartoon-business.htm

115 El libro blanco de la animación, Diboos, 2011.

Arnesen: "At Hasbro, we are completely agnostic about where a property might start and end"[116]. New synergies arise between book publishers, game companies and toy manufacturers (e.g. Bayard Animation Jeunesse, Ravensburger Digital).

Traditionally, a publication could become a TV series, then possibly a film, and eventually become a brand to be exploited through a full set of L&M licensors. Some peculiar samples of different business models include Rovio's game app *Angry Birds* becoming a franchise and then a TV series; or Giochi Preziosi's *Gormiti* toys franchise becoming a TV series.

Brands are bigger than broadcasters. TV channels have now understood that "significant brands are being built on these devices (smartphone, tablet or iPod touch)"[117] and that they are not the sole 'authenticators' anymore. What is today the added value of a TV channel in the VoD world?

TV channels cannot invest in innovation either: "digital can act as a kind of reverse engineering test lab" [118]. A new format has appeared: 'appisodes' are TV show episodes or video clips available for viewing on the mobile phone[119], to eventually build momentum in digital platforms and then be released on TV. Rovio's Tuomo Korpinen, when launching their app, said that "with more than five billion views globally from within its mobile games, the time was right to create an app version of the popular platform [TonnsTV]"[120].

"Contents and products are no longer separate entities but experiences on a single continuum. (…) forms of 'Digital Storytelling' on a single spectrum of increasing interactivity"[121].

Reviving classic IPs

In parallel, we are witnessing a revival of classic IPs. This is more due to commercial reasons than to a lack of creativity: recognition has a value for broadcasters. IPs get identified with (family) values; young parents recover their childhood characters and want them for their own kids: nostalgia sells.

Broadcasters and producers are rebooting classic brands to repeat the past success: Germany's Studio 100 is producing 3D animated versions of *Maya the Bee, Vic the Vicking* or *Heidi* that are finding enormous success. Spain's Anima Kitchent is releasing in 2015 the 3D version of *Telerin family* a show which was successful in Spain and Mexico more than 40 years ago. And many other examples.

Those old properties are also being remade (instead of re-run) due to technical and rhythm reasons: today episodes' pace is faster and scripts include a bigger proportion of gags per episode[122].

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[116] "Digital takes custody of the kids", by Andy Fry, in http://issuu.com/mipmarkets/docs/miptv_2015_preview , March 2015

[117] http://www.theguardian.com/technology/appsblog/2012/oct/08/digital-kids-brands

[118] "Digital takes custody of the kids", by Andy Fry, in http://issuu.com/mipmarkets/docs/miptv_2015_preview , March 2015

[119] http://www.urbandictionary.com/define.php?term=appisode

[120] http://kidscreen.com/2015/10/01/rovio-launches-toonstv-app/?utm_source=newsletter&utm_medium=email&utm_campaign=rovio-launches-toonstv-app&_u=y10oxbBczy0%3d

[121] "Taming the future – Perspectives on the Digital World from BBC Children's", by Daniel Bays and John Haywood, in: Children's Media yearbook 2015, edited by Lynn Whitaker and Beth Hewitt, The Children's Media Foundation

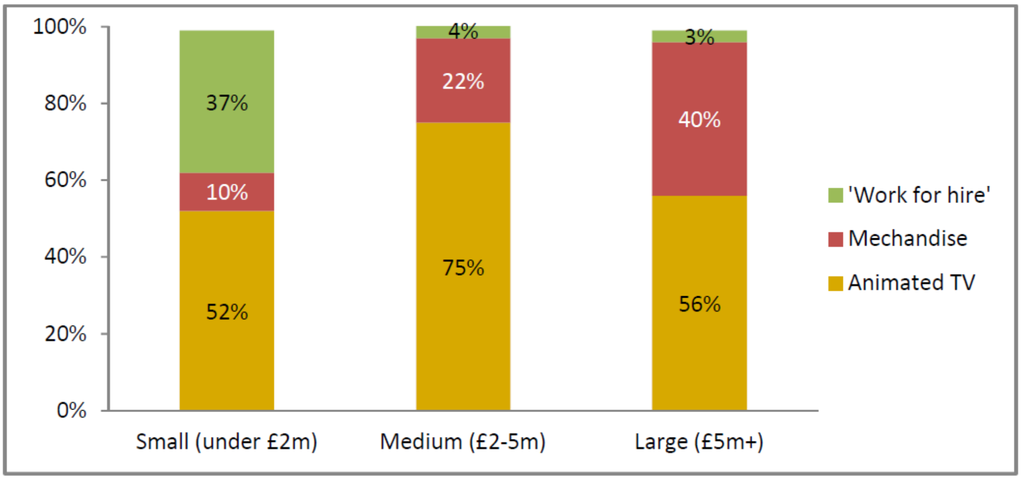
[122] "The best stories keep on going", by Bob Jenkins, in: http://issuu.com/mipmarkets/docs/mipjunior_2015_preview, September 2015

Creating and managing IPs is a matter of scale

The new core business in animation is not anymore the production process itself, but IP management: creating a portfolio of copyrighted projects and exploiting it. The differentiation between management of IPs and production is the value added to selling catalogues and brands instead of single titles. And producers need partners to do this. It is a matter of critical size: a production company cannot afford the cost of a sales team if they produce one TV series per year.

Creating and exploiting an IP is eventually a matter of scale: smaller companies dedicating their efforts to service are not able to maintain a portion of the rights to that IP. And thus, have no further income from those properties. In UK (2011) "the largest companies (with turnover of £5m and over) received 40% of their revenue from merchandising and ancillary revenue. Of animation companies with turnover of less than £2m, 37% of revenue came from 'work for hire' projects and just 10% from ancillary sources"[123].

119 Proportion of revenues by type in UK's small, medium and large companies (2011)



Source: Animation UK report, 2011

Finding the balance between producers and broadcasters

Everybody wants a piece of the pie, and broadcasters demand more and more rights related to the animated programmes they co-produce. A national broadcaster with the financial power to invest in an animation programme will have a territorial limitation for the international broadcasting rights. If they enter as co-producers with 15-20% of budget, they will want to keep that same percentage on every derivate product of the IP. Another business model is arising with TV broadcasters acquiring an IP -a brand- and then looking for the production partner to create related content (e.g. Catalonia's TV3 and *The triplets*).

One of the main challenges today is on how to keep that European IP within Europe. UK originated *Thomas & Friends* franchise has been ranking as the number one preschool property for more than 15 years, but it was acquired by Mattel® when buying Hit Entertainment in 2011[124]. Also Canadian

[123] Animation UK, Securing the future of UK animation, September 2011.

[124] http://www.telegraph.co.uk/finance/newsbysector/retailandconsumer/8847097/Thomas-the-Tank-Engine-owner-Hit-Entertainment-sold-to-Mattel-for-680m.html

Entertainment One, which already co-owned UK's successful series *Peppa Pig*, announced in October 2015 buying a 70% stake of co-owner (and creator) outfit Astley Baker Davies[125].

2.5 Enlarging the audience

Animation is not a genre but a technique, a language that can be used in any audiovisual genre (fiction, documentary). Animation is much more than kids' cartoons.

TV animation is defined overall as children's content. Linear broadcasters commission and programme animation for pre-scholars (2 to 6), kids (6 to 9) and tweens (9 to 12), but do not target teens (12 to 15), who have to turn to the internet to find their age-related contents and in UK they declare "they spend more time going online than watching television"[126]. TV channels' preference for kids' content is strongly related to the ancillary business of brands' licensing and merchandising, which is analyzed below.

Theatrical animation is a different business with a larger target audience. Although the large majority of animated features released theatrically are produced for young audiences, conditions seem more favourable today for adult audiences (at least in some European territories (like France, Spain, Germany, etc.) with trends like animated documentary feature ("Waltz with Bashir", "Persepolis", "Another day of life") which are not new formats (Winsor McCay's animation *The Sinking of the Lusitania* dates from 1918) but seem to be conquering the World screens in the last 5 years.

Animation is much more than cartoons, too. The industry has opportunities in other sectors with which it has fluid synergies like videogames and VFX, but also on very different fields, such as the automobile industry, medicine, architecture, etc. It has to be understood as an industrial know-how that can be learned and applied in multiple businesses.

2.6 An on-going restructuring process

The level of investments in the development of new brands, the necessity of obtaining worldwide pre-sales or distribution deals, the opportunity of relocating studios in Europe have increased the need for scale and therefore have led to a concentration process.

International concentration between animation companies

For some years now, there have been numerous examples of consolidation.

On one hand, a number of big European companies have been bought by US, Canadian or Indian outfits:

- UK's Hit Entertainment was acquired by Mattel in 2011 (USD 680 M).
- UK's The Foundation, became part of the Zodiak Media group in 2006.

[125] http://deadline.com/2015/09/entertainment-one-peppa-pig-astley-baker-davies-stake-1201560180/

[126] Ofcom, Children and Parents: Media Use and Attitudes Report, October 2014.

- Canada's 9 Story acquired Ireland's biggest studio Brown Bag in August 2015 (EUR 40 M).
- Canadian Entertainment One acquired a 70% stake of UK's Astley Baker Davies (*Peppa Pig*) in September 2015.
- Spain's Imira was bought by Indian Toonz end of 2014.

In parallel, the reverse happened when some European companies acquired foreign studios. E.g. . The existing talent drain seems to be going both ways too, with European animators leaving to work in US or Canadian studios and worldwide professionals coming to work in growing European companies from Ireland, France or UK.

A third phenomenon taking place in the last years is the interest of US studios in European animation studios. One case scenario is service outsourcing: Universal Studios' Illumination Entertainment contracted French MacGuff studio's services for the production of *Despicable Me* in 2009. The success of the film resulted in the acquisition in 2011 of the French animation studio by Universal, resulting in Illumination Mac Guff (producers of *Lorax* and *Despicable Me 2*). Another example is the announcement in June 2015 of the Paramount alliance with Spain's Illion for the production of its next feature.

US companies are more and more turning to European companies for their movies' SFX (e.g. Germany's Trixter work on Ant Man, Avengers, Iron Man 3, etc.[127]; or Spain's Next Limit – SGO's work on Star Wars VII, The Hobbit, Transformers, etc.[128]). *In UK, the SFX industry's calculated value is five times the animation industry (GBP 500 M) according to Animation UK's Oli Hyatt*[129].

As the key factor behind these international structuration movements is the control and management of IPs at European / international level, some mergers have also taken place among European companies, resulting in production and distribution giants. Some examples are:

- **Zodiak Media** produces entertainment, factual, drama and kids' programming, with 45 companies operating in 15 countries. Headquartered in Paris, it is majority-owned by Italian conglomerate DeAgostini and operates across the world[130]. Zodiak Kids has dedicated international sales and consumer products teams representing programming from the Group's production companies and third party producers. **Zodiak Kids** boasts one of the largest, high-quality kids catalogues in the world. The merger with Banijai (also a company of DeAgostini Group) in the summer of 2015 has led to creating one of the world's biggest independent production and distribution companies, with revenues of around USD 1 billion[131].
- France's **Marathon Media** is the result of Zodiak Entertainment's acquisition of Marathon Media Group. It is a worldwide French TV production company. Its branch Marathon Production is one of France's main TV animation producers and it is a fundamental division of Zodiak Kids's licensing department (Zodiak Kids Consumer Products Paris).
- Belgium's **Studio 100 Group** has grown to become one of the largest independent global family entertainment companies with more than 1,000 employees (FTE) worldwide and

[127] www.trixter.de

[128] http://www.nextlimit.com/pdf/Next_Limit_Mistika.pdf

[129] Obs personal interviews

[130] https://en.wikipedia.org/wiki/Zodiak_Media#Zodiak_Media_companies

[131] http://variety.com/2015/tv/global/banijay-zodiak-to-merge-to-create-1-billion-production-house-1201549764/

offices in Belgium, the Netherlands, France, Germany and Australia. In 2008 Studio 100 took control of EM Entertainment and became an international player as the owner of one of the largest independent catalogues of children's content, characters and classics. That same year they opener Studio 100 animation in France, their animation studio for both re-makes of classics and original creations. Through Studio 100 Media, based in Munich, the company distributes TV series worldwide.

- **Mediatoon** is a merger of Ellipsanime, Dupuis, Storimages and Le Ballon within the Media Participations group.

Large media groups expanding into animation production

Some European media groups and publishers have followed an international acquisitions policy that has turned them into pan-European players, and they have seen the necessity of adding an animation branch to their structures. Some examples are:

- UK's **Fremantle Media** is a British international television content and production/distribution subsidiary of Bertelsmann's RTL Group (Europe's largest TV, radio, and Production Company). Fremantle Media Kids & Family Entertainment was founded in 2009 and its content airs globally on leading broadcasters and digital platforms and extends into toys, games and other consumer products across the world[132]. "Fremantle has slipped down the Premier League of producer-distributor groups. While Endemol and Shine have created a new super group, Banijay and Zodiak have aligned. (…) Freemantle has been conspicuous by its lack of mega-deal-making"[133].
- Spain's **Planeta Junior** is a parent company of Planeta Group and DeAgostini. Planeta Junior's catalogue has increased since February 2014, due to the output deal signed with DreamWorks Animation (more than 1.100 half-hours) making the company the exclusive TV sales agent of DWA properties in Spain, Portugal, Italy, Greece and Turkey and consumer products exploitation in these territories plus Central and Eastern Europe[134].
- France's **Lagardère Group** has audiovisual production as one of its four core businesses. Lagardère Active plays a central role in the French media, with its strength built on iconic brands such Gulli (TV). Lagardère Active is also the largest media group in terms of audience on the mobile web in France.

There seems to be an opportunity for European animation companies to compete against Asia for the making of the animation. Competitiveness is based on a higher quality at (almost) the same cost. Also, public bodies should make sure their support is addressed to keeping the IPs in Europe, thus helping the industry at structural levels.

[132] http://www.fremantlemedia.com/Kids.aspx

[133] TBI's Editor's note, by Steward Clarke, TBI, August/ September 2015.

[134] www.planeta-junior.com *and* http://variety.com/2014/tv/global/dreamworks-animation-enters-into-planeta-juniors-orbit-1201096090/

3.The key role of public funding

- There are three main forms of public support to the audiovisual production: direct public funding, tax incentives and mandatory direct investments for broadcasters. Animation can be either supported by specific funding schemes, or can be eligible for schemes supporting any category of programmes.
- Whereas direct funding schemes specific to animation are available in 11 EU countries, tax incentives schemes are almost always generalist, i.e. targeting all categories of programmes, with the exception of UK's animation tax relief. Generalist tax incentives schemes may not be perfectly suited to the peculiarities of animation, in terms of budget or duration of production, or even in terms of the eligibility criteria.
- Even if not specific to the animation industry, tax incentives seem to have a measurable effect on the level of production; this has led to a competition between European countries based on financing and not on talent, as countries compete to offer the most attractive tax incentive schemes. However, there is no evidence that the multiplication of tax incentive schemes has per se driven a decrease of public funding.
- There is a growing concern that tax incentives should focus on the production of content, and anticipate the decreasing role of broadcasters in the financing of animation. To some extent, tax incentives should not only lower the costs of production, but also bridge the lack of pre-financing by broadcasters until the programme recoups its investments through its exploitation by new platforms.
- Mandatory direct investments can apply to all broadcasters or only Public Service Broadcasters. Animation (or children's programming or "young audiences programming") can count as part of compliance but rarely benefits from specific obligations. The level of mandatory investments is generally correlated to the revenues or the programming expenses of the broadcasters. Mandatory direct investments for animation, as for other categories of programming, therefore may decline as broadcasters revenues are under pressure.
- Generally speaking, obligations and/or public missions have made the Public Service broadcasters the leading investors among broadcasters.

120 Examples of countries with financing schemes specifically dedicated to animation[135]

Direct public funding	Tax incentives	Mandatory direct investments
Belgium Bulgaria Croatia Denmark Estonia France Ireland Lithuania Netherlands Poland Germany	UK	Denmark (Young audiences and children programming) Italy France

Source: OBS

This section concentrates on a description of the types of public financing available in Europe, and explains the particularities found in some of the countries[136]. It is based on the analysis of funds by the European Audiovisual Observatory in the frame work of its Korda project.

Public financing in Europe can take three distinctive forms: direct funding, fiscal incentives and mandatory direct investment from broadcasters. In France, all three types are present, established and well provided, making it a unique territory that will be analyzed independently as a case study at the end of the chapter.

Due to the existence of different types of funding in some countries only, to the non-existence of specific ones for animation and to the massive lack of data at European level, it is not possible to calculate the total amount of funding available for animation in the continent.

3.1 Public funding – direct funding

National public direct schemes

On a national level, there is specific support to animation in:

- Belgium (Flanders region): EUR 1.400.000 for features and EUR 1.200.000 for TV series in 2014.
- Bulgaria: in The Film Industry Act (2003) it is written that there will be support for up to 160' of animation, the maximum amount being approximately EUR 4.500 per minute (8.800 BGN).

[135] This table does not include generalist schemes for which animation programmes are eligible and sometimes benefit from specific eligibility or funding criteria.

[136] The majority of the information included in the chapter comes from the contributions of Animation associations, National Institutes, Creative Europe desks and animation professionals from all over Europe.

- Croatia: Croatian Audiovisual Centre (HAVC) currently operates two funding schemes for animation: feature-length animation scheme (exceptionally: e.g. in 2011 they supported an animation film with EUR 530.000) and animation shorts scheme (EUR 300.000 per year). The City of Zagreb also supports short animation film (EUR 125.000).
- Denmark: In 2010 the Danish Film Institute established an animation pool of DKK 10 million for development and production of animated short formats. Public broadcaster DR also contributes with DKK 5 million to the animation pool.
- Estonia: the Estonian Film Institute (EFI)'s annual budget for animation is EUR 750.000. For features, the maximum is EUR 800.000, divided in 3 instalments over 3 years. The maximum amount for short animation is EUR 280.000. The Estonian Cultural Endowment (KULKA)'s support is EUR 2.400 per minute, for a maximum amount of EUR 120.000. In the case of minority co-productions, the support can be up to the half of the maximum amount.
- France: see case study at the end of the chapter.
- Ireland: The Irish Film Board has specific lines to finance animation production (EUR 1,12 M were granted to 7 animation productions in 2013), and development (EUR 258.000 for 10 animation projects that same year). Frameworks scheme (IFB, RTE and Arts Council) specifically supports Animation Short Films, financing a maximum of 3 short films per year, with a maximum budget per film of EUR 46.000.
- Lithuania: support for animation includes Development (up to EUR 60.000), Production of features (up to EUR 725.000) and Production of shorts (up to EUR 145.000).
- Netherlands: The Netherlands Film Fund has a specific scheme for animation allocating EUR 725.000 per year. In 2014, the total expenditure of NFF on audiovisual was EUR 39.313.146, of which 4,1% (EUR 1.609.175) was allocated to animation (features and shorts) increasing by 45,5% the EUR 1,1 M allocated in 2013.
- Poland: support to animation includes EUR 300.000 available for development and EUR 3,2 M for production.
- In Germany, a new initiative has appeared to support children's contents: Der Besondere Kinderfilm has been opened to animation as from 2015. It is possible thanks to the collaboration of 23 partners including public television, the regional Funds, the film industry, and the FFA.

In most European countries, however, there is no public funding specific to animation, with a separate budget, although animation projects are eligible in the general funding schemes (sometimes only for feature films, though). That is the case for: Austria, Belgium (Wallonia region), Germany, Greece (the budgetary line for animation was stopped in 2009), Hungary, Iceland, Italy, Lithuania, Luxembourg, Malta, Norway, Poland, Portugal, Slovenia (where it's very hard for animation to get funding because of a legal prerequisite demanding that all projects funded by public money have to be complete in 2 years) and the United Kingdom.

European public schemes

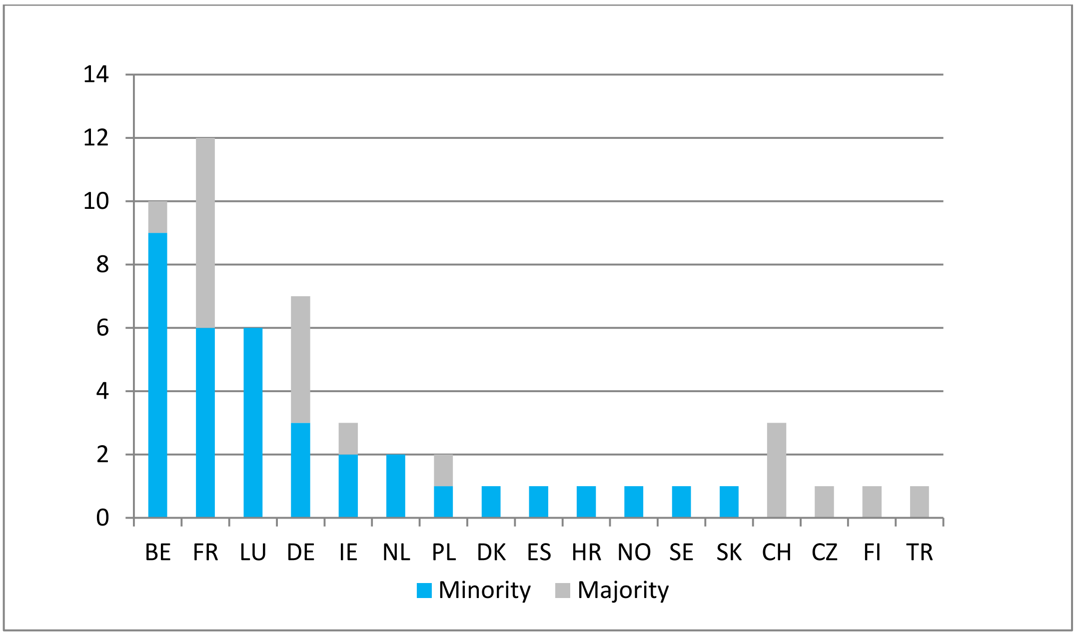
On the European level, there are mainly two sources for funding animation projects: Creative Europe and Eurimages.

The European Commission's **Creative Europe's MEDIA** sub-programme is the main European source of support to animation. Since its inception in 1991, Media has significantly helped to change the

European audiovisual industry, by: providing tools for the circulation of works outside the national frontiers; promoting international co-productions; and more particularly, participating in the growth of the European animation industry which has today an important role in the World market (see case study below).

Eurimages, the cultural support fund of the Council of Europe, is the European fund that supports feature films' co-productions, with up to EUR 500.000 per film or 17% of total budget. Although there is no specific line of support, animation feature films in co-production and intended for theatrical release are eligible. On average, 4 animated features have received Eurimages support annually in the period 2005-2014.

121 European countries involved in the 19 animation films supported by Eurimages 2010-2014, by country of minority co-production



Source: OBS

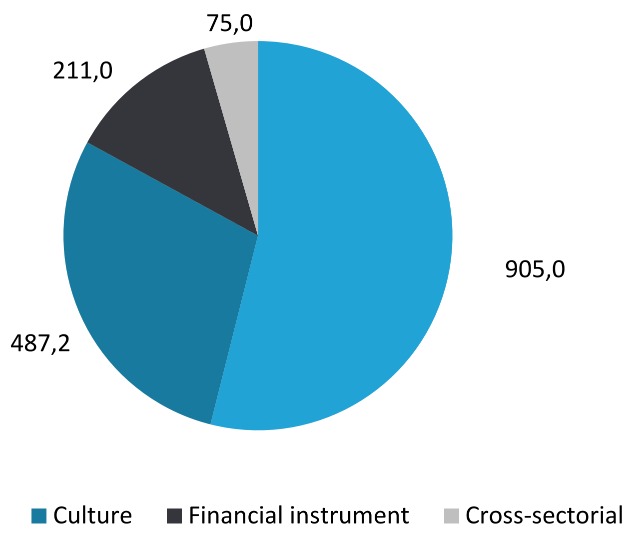
A total of 19 animated feature films received support from Eurimages from 2010 to 2014, one third of them (6) being French-Belgian co-productions. France is the country with the biggest participation, but had the same number of films in co-production as Luxembourg. From this perspective, Belgium appears as the most prolific European country for minority co-production, having participated in 9 films (47,4% of all productions). Lastly, two of the five biggest European territories are missing in this picture (United Kingdom and Italy), while the fifth one (Spain) is involved one film only, as minority co-producer.

Case study - *MEDIA*[137]

Creative Europe's MEDIA sub-programme (2014-2020) supports the EU film and audiovisual industries financially in the development, distribution and promotion of their work. It helps to launch projects with a European dimension and nurtures new technologies; it enables European films and audiovisual works including feature films, television drama, documentaries and new media to find markets beyond national and European borders; it funds training and film development schemes.

Creative Europe provides €1.46 billion over seven years to strengthen Europe's cultural and creative sectors (at least 56% of its budget –over EUR 800 M- for the MEDIA sub-programme)[138].

122 Creative Europe budget for 2014-2020, in million euros



Source: EPRS, 'How the European budget is spent' (see related footnote).

Types of support under Media include:

A) **Development** of feature films and TV series (Single Projects up to EUR 60.000 or Slate Funding scheme up to EUR 200.000): 146 animation projects were granted development funds in the period 2010-2014. Funding available for development typically amounts for 12% of Media budget (plus another 2% to development of interactive works).

B) **TV programming** (up to EUR 500.000 or 15% of total budget): 60 European animated TV series received support from 2010 to 2014. This support is praised by European producers as one of the most important pillars for funding animation in Europe. Nevertheless, animation TV series are not eligible for second or further seasons, while fiction is, which is one of the

[137] http://eacea.ec.europa.eu/creative-europe/actions/media_en, and Commission Staff Working Paper - Impact Assessment, Accompanying the document 'Regulation of the European Parliament and of the Council, establishing a Creative Europe Framework programme', {COM(2011) 785 final}, {SEC(2011) 1400 final}, http://ec.europa.eu/programmes/creative-europe/documents/ce-impact_en.pdf

[138] Briefing. How the EU budget is spent, EPRS - European Parliamentary Research Service, Author: Matthew Parry and Magdalena Pasikowska-Schnass, Members' Research Service, September 2015 (http://www.europarl.europa.eu/RegData/etudes/BRIE/2015/568320/EPRS_BRI%282015%29568320_EN.pdf)

industry's most recurrent petitions to the European programme[139]. This scheme funds amount to 12% of the total Media budget.

C) **Distribution** (automatic and selective schemes, plus support to Sales Agents): 102 animation projects from Europe received distribution funds from the Media programme (2010-2014). Around 38% of total Media funding goes to distribution (27% to automatic support; 4,5% to Sales Agents; and 6% to Digital platforms). With regards to film circulation, Media also supports the network of cinemas Europacinemas (11% of budget).

D) **Festivals**: Media supports many animation festivals in Europe like Annecy (FR), Anima (BE), Trickfilm (DE), Monstra (PT) or Animateka (SI) (see Festivals chapter for more detail). This scheme represents 3% of the total media budget.

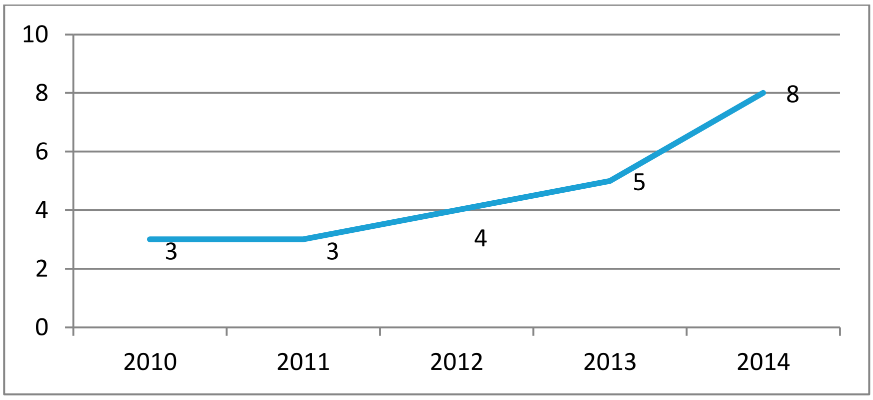
E) **Promotion - Markets and events**: Media also supports professional markets and events and promotes the attendance of European professionals (MIFA, MIP Junior, MIP TV, etc.). Though the most successful, long-lasting Media-supported programme in the animation field is **Cartoon** (see case study below). 10% of the total Media budget goes to markets.

F) **Training**: every year, Media supports a varied number of training initiatives, like AniDox:Lab, ETNA, La Poudrière, The Animation Workshop, etc. among others (see Training chapter for more detail). 7% of the Media budget is dedicated to funding Training in Europe.

G) **Co-production Funds** are supported with 1% of Media budget.

The table below shows the growing interest for European animation programmes in one of the World's top markets (Mip Junior), put in relation to the growing number of projects supported by Media that lead the lists.

123 European TV Animation projects supported by Media and included in MIP Junior Top 30 (2010-2014)



Source: Creative Europe, Reed Midem and Obs

Furthermore, both in 2013 and in 2014, three European programmes, supported by Creative Europe Media sub-programme, were listed among the top five at MIP Junior's Top 30 list of most requested programmes by buyers.

[139] Based on desk research by the Observatory.

***Cross-sectorial**: 13% of Creative Europe's funding (or EUR 190 M) goes to actions such the network of Creative Europe Desks and the European Audiovisual Observatory. From 2016, it will also finance the setting up of a EUR 121 M financial guarantee instrument (which will be managed by the European Investment Fund) to help the audiovisual, cultural and creative sectors gain better access to finance*[140]*.*

Case study - *CARTOON*

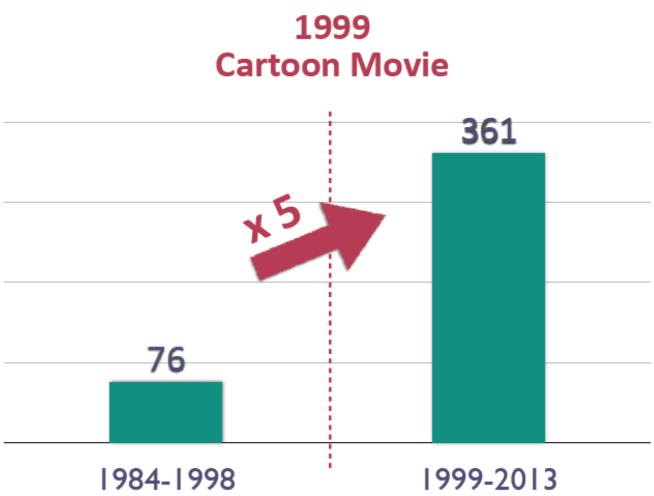
CARTOON[141] *is an international non-profit association based in Brussels organizing co-production forums Cartoon Forum and Cartoon Movie; the Cartoon Master training seminars; and Cartoon Connection, a programme intended to explore ways of reinforcing cooperation between EU and non-EU animation professionals.*

***Cartoon Forum** was created in 1990 to boost the co-production and distribution of European animation for television and new media platforms. In 25 editions, it has helped 645 projects, or 36% of projects presented (and 42% the last 10 editions) obtain financing to the tune of 2.2 billion euros.*

***Cartoon Movie** is an annual forum aimed at strengthening the production and distribution of animated feature films in Europe.*

Since 1990, over 229 films pitched, with a total budget of 1.6 billion Euros, have secured their financing and have been released.

124 Number of animated feature films produced in Europe



Source: Cartoon based on Lumiere database

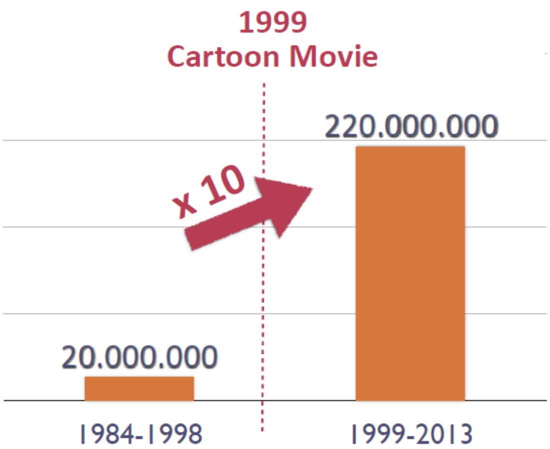
What is most interesting is seeing how, in the first 14 years of Cartoon Movie, production volumes of European animation features multiplied by five compared to the precedent 14 years, while admission to European features in Europe multiplied by 10[142]*.*

[140] http://www.creativeeurope.be/sites/creativeeurope/files/media/creativeeurope-aguideforaudiovisualprofessionals-2014.pdf

[141] http://cartoon-media.be/

[142] Cartoon statistics based on Lumiere database.

125 Audience for European animated feature films in Europe



Source: Cartoon based on Lumiere database

Cartoon Connection*'s purpose is to encourage cooperation between animation professionals from: Europe, Canada and Latin America (Cartoon Canada) or Europe and Asia (Cartoon Asia).*

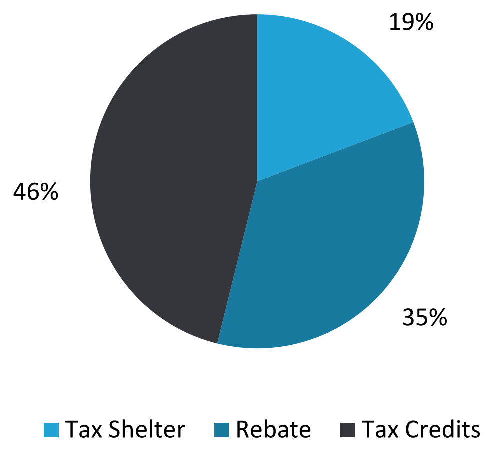
Cartoon Masters *give both a theoretical and practical approach (case studies) on the current issues faced by the industry, focusing on 4 areas: Cartoon Business (new models of financing and revenues for animated TV series), Cartoon Digital (connected screens), Cartoon 360 (cross-media projects), and Cartoon Springboard (where young talents of European animation schools meet with experts).*

From 2006 to 2014 and with the support of the MEDIA Programme of the European Union, CARTOON organised the ***Training for Trainers*** *meeting, thanks to which the European Training Network for Animation schools, ETNA, was created.*

3.2 Public funding – fiscal incentives

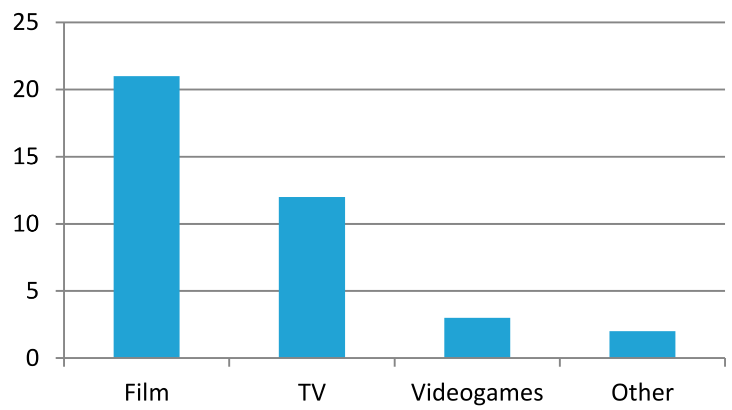
A comparative study of all fiscal incentives available in Europe[143], shows that by the end of December 2014, 26 fiscal incentive mechanisms were active in 17 European countries. Since then, other new incentives have appeared (Italy, UK, Spain), or have been announced for 2016 (Estonia's 30% cash rebate); and furthermore, many of the existing schemes keep being improved (Ireland, France, Italy) and extended to include new activities (platforms, web).

126 Fiscal incentives in Europe by category



Source: OBS based on data from Impact Analysis of fiscal incentive schemes supporting film and audiovisual production in Europe.

127 Coverage of the 26 identified schemes by sector supported



Source: OBS based on data from Impact Analysis of fiscal incentive schemes supporting film and audiovisual production in Europe.

[143] Impact analysis of fiscal incentive schemes supporting film and audiovisual production in Europe, a report by Jonathan Olsberg and Andrew Barnes, Olsberg SPI, published by the European Audiovisual Observatory, December 2014

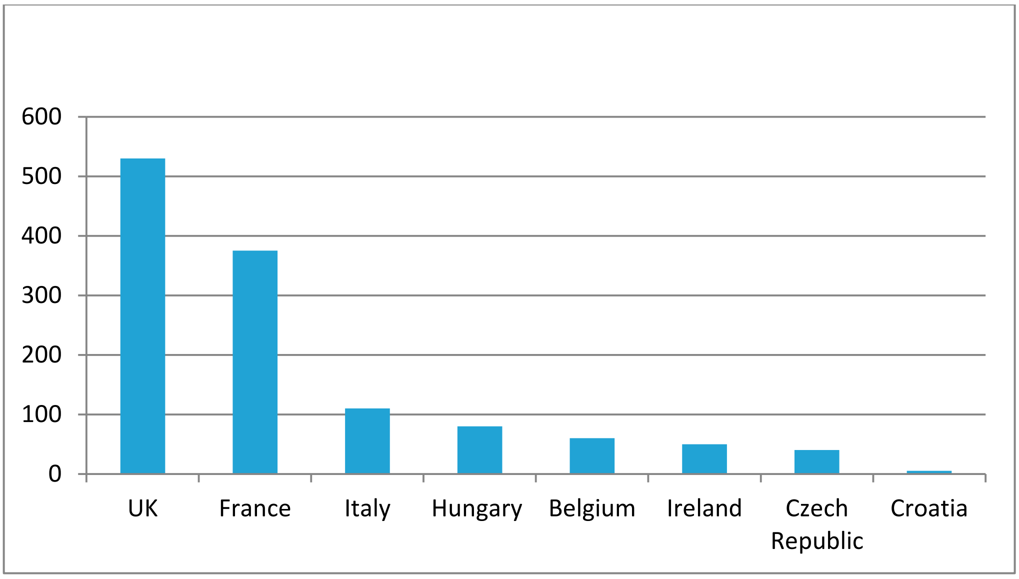
There are three types of incentives:

- Tax Shelters: designed to attract investment from tax-payers who are permitted to deduct investments in qualifying productions against their tax liabilities. It is the case for Belgium, Lithuania or France's SOFICA
- Rebates: consists of repaying producers a percentage of the qualifying costs of the budget according to a clear set of regulations. These schemes are directly funded from the state budget. Some examples are Austria, Czech Republic, Germany or Latvia.
- Tax Credits: follow the same principle as Rebates for the calculation of qualifying costs. However, the amount is deducted from the tax liabilities of the producer when his annual corporate return is filled. Examples can be found in the United Kingdom, Italy, Ireland (since 2015; before it was a Tax Shelter) or France.

Some are designed to support cinema, others TV programmes and many, both formats. Some countries are also introducing the coverage of web video (Italy) and the eligibility of digital platforms as distribution window (UK).

The total budgets available vary drastically from one country to another, as seen in the table below.

128 Total budgets available for fiscal incentives, in selected European countries in 2013 (in EUR million)



Source: Obs, based on data from Impact Analysis of fiscal incentive schemes supporting film and audiovisual production in Europe

In Europe, only one incentive is specific for animation: UK's **Animation Tax Relief**. Introduced in 2013 to support Broadcast Animation, this tax credit provides relief of 20% on 80% of qualifying UK spend (or on 100% of total spend), with a minimum UK spend of 10% of the overall budget. One of its particularities is that it includes productions intended only for OTT services, such as Netflix. The incentive was activated at the same time as the High End Television Tax relief. Both budgets can be compared in the graphic below. In 2015, a new Children's Television Tax Credit was active from April.

129 Approved budgets for HETV and Animation Tax Reliefs in UK, 2013-2018

1 GBP – 1.15373 EUR	High-end TV tax relief	Animation tax relief
2013/2014	GBP 5 M (€ 5.77 M)	GBP 5 M (€5.77 M)
2014/2015	GBP 25 M (€28.84 M)	GBP 10 M (€ 11.54 M)
2015/2016	GBP 45 M (€51.92 M)	GBP 15 M (€ 17.31 M)
2016/2017	GBP 60 M (€ 69.22 M)	GBP15 M (€ 17.31 M)
2017/2018	GBP 70 M (€ 80.76 M)	GBP 15 M (€ 17.31 M)
Total	GBP 205 M (€ 236.51 M)	GBP 60 M (€ 69.24 M)

Source: High-end Television and Animation tax reliefs in UK, EC

Nevertheless, animation is eligible for most of the 26 fiscal incentives schemes available. It is important to highlight that, given the specificities of the animation those schemes are not always adapted to this industry. The particularities that need to be revised are:

- Animation has higher costs, which demands higher cap limits.
- Animation takes longer to produce, which needs larger time limits of the incentives.
- Animation has different production procedures, which should consequently define the eligible qualifying costs
- Animation has production particularities, which are incompatible with the cultural requirement tests (such as locations, talent nationality, etc.).

In France, from the five active schemes only one does not include animation (Videogames Tax Credit). All other four are analyzed in detail in the case study at the end of the chapter.

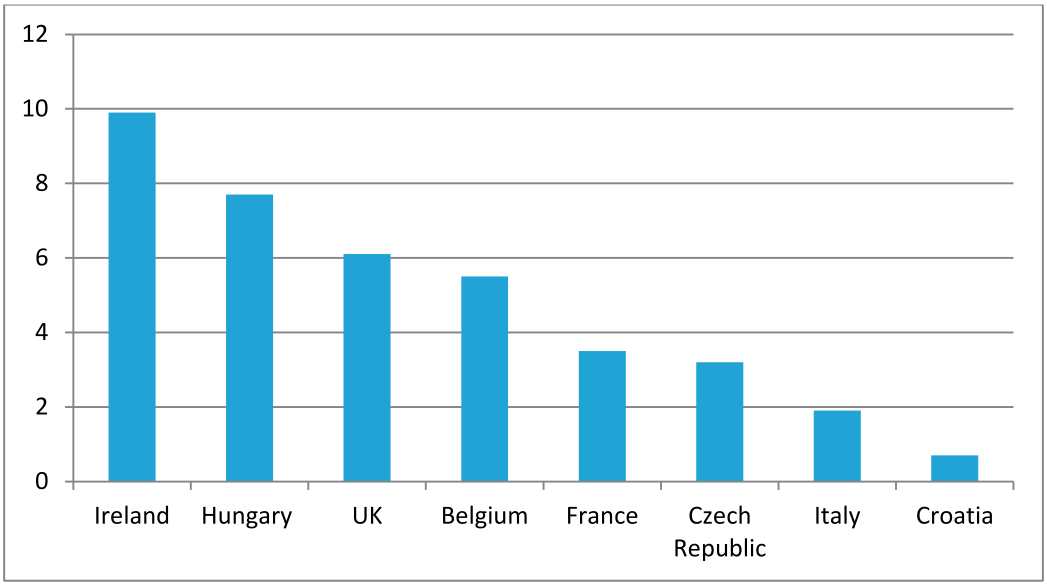
In some of the European territories in which there is a tax incentive (even if it is not specific for animation), its inception has resulted in a significant growth of the animation industry, by placing these countries as strong minority co-producers or service providers. These are the most outstanding cases:

Ireland's Section 481: was introduced back in 1997 as a Tax Shelter. In January 2015 it has become a Tax Credit and has been enhanced: the rate of tax relief has been significantly increased and is now worth up to 32% of eligible Irish expenditure; the payable tax credit is now based on the cost of all cast & crew working in Ireland, regardless of nationality; and greater flexibility in the application process: applications can be submitted at any time prior to the completion of the project[144]. Tax credits to production companies are the most common form of support in Ireland[145]. The graph below shows how Ireland stands out when comparing total budgets in proportion to the country's population.

[144] http://www.irishfilmboard.ie/financing_your_film/Section_481/5 and http://www.irishfilmboard.ie/irish_film_industry/news/Irish_Tax_Credit_for_Animation_Film_and_TV_Enhanced_up_to_32_Value/2685

[145] Economic impact assessment of Section 481 Film relief, Fiscal Division, Department of Finance, December 2012 (http://taxpolicy.gov.ie/wp-content/uploads/2012/12/2012-12-04_film-relief_economic-impact-assessment_final-report_final.pdf)

130 Fiscal incentives' budgets in proportion to the population, in selected European countries in 2013 (in EUR per capita)



Source: Obs, based on data from Impact Analysis of fiscal incentive schemes supporting film and audiovisual production in Europe

Belgium’s Tax Shelter: installed in 2003, it is designed as a shelter for private investment in Belgium film and TV production; certification is conducted through the regional screen agencies, with the federal tax authorities controlling investors’ tax payments. Its structure is so complex, that finance companies act as intermediaries between individual investors and the producers of the content[146]. In 2014, some improvements were introduced and the cap per film was settled at EUR 15 M[147].

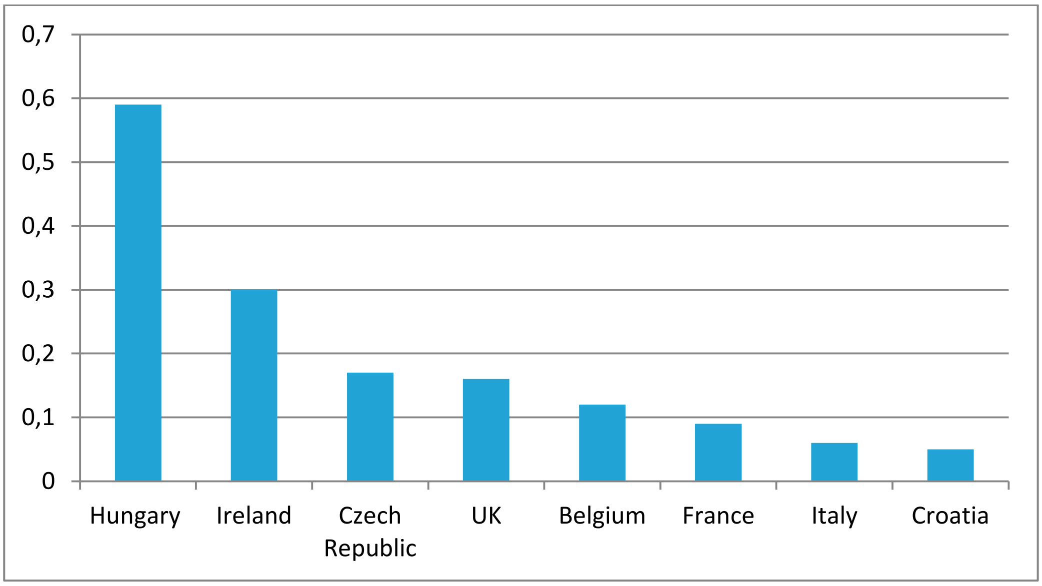
Czech Republic’s FISP: installed in 2010, the Film Industry Support Programme (FISP) was intended to facilitate the creation of film co-productions in the Czech Republic. Within this, it was intended that productions would come both from the wider European industry and the United States. The minimum spend requirements depends on the genre, being CZK 15 M (EUR 579,000) for animated films (for theatrical or TV) and CZK 10 M (EUR 386,000) for animated TV series or episodes.

Hungary’s Indirect Subsidy: corporate tax shelter installed in 2004, it depends since 2012 on a Fund operated by the Hungarian Film Office. The Fund cash-flows the production as it allows the producers to determine if they receive the incentive on a quarterly basis throughout the production, or at the end when the film is finally certified. In May 2014, the Hungarian Parliament passed an extension to the scheme, prolonging the legislation to 2019, whilst simultaneously increasing the value of the rebate to 25% of production spends. Comparing the total budgets for the schemes in selected European territories, Hungary stands out as the one with the highest budget in proportion to GDP, as shown in the graph below.

[146] Impact analysis of fiscal incentive schemes supporting film and audiovisual production in Europe, a report by Jonathan Olsberg and Andrew Barnes, Olsberg SPI, published by the European Audiovisual Observatory, December 2014

[147] http://www.lalibre.be/economie/actualite/cinema-le-nouveau-tax-shelter-sur-les-rails-52fe38b83570516ba0bb8035

131 Fiscal incentives' budgets in proportion to GDP, in selected European countries (in % of GDP)



Source: Obs, based on data from Impact Analysis of fiscal incentive schemes supporting film and audiovisual production in Europe

In **Malta**, animation (features and TV series, not videogames) can apply for fiscal incentives in the form of a cash rebate on production expenditures incurred in Malta (up to 27%). A qualifying production considered as "difficult audiovisual work" may qualify for a maximum rebate of 32% of the eligible expenditure.

Among the new improvements, the latest updated was Italy's. The three existing Tax Credits for cinema (Internal, External and International, whose budget was increased in 2014 from EUR 100 M to EUR 110 M) have been enlarged to include all audiovisual productions (TV) since April 2015. Producers can recoup 15% of all eligible Italian spend[148]. Luca Milano, from RAI commented on this: "while it's a positive step into the right direction, the 15% of tax credit is still low compared to other European countries, which hinders Italian competitiveness"[149]. This measure is too recent to analyze its results, but some producers have suggested that the amount available was insufficient, since it was fully spent in the first 6 months[150].

In Spain, modification in January 2015 of Corporate Income Tax Law which increases tax credit for local productions from 18% to 20% (for the first EUR 1m) and introduction of a tax credit of 15% for Spanish producers with international co-producers, has been considered by the industry a very much anticipated measure but unable to compete with other European territories[151].

[148] http://www.apt.it/wp-content/uploads/2015/03/GU_25marzo_MIBACT_Disposizioni-applicative-per-lestensione-ai-produttori-indipendenti-di-opere-audiovisive-dellattribuzione-del-credito-dimposta-per-le-attivita-cinematografiche.pdf

[149] Personal interviews.

[150] Personal interviews

[151] http://www.audiovisual451.com/la-regulacion-de-incentivos-fiscales-para-rodajes-extranjeros-en-espana-mas-intenciones-que-efectividad/

Impact of fiscal incentives

Countries in Europe have different measures to calculate this impact, the ROI or Return on Investment of the amount invested being the most useful: "Especially in countries where incentive systems have been in place for some years, the return on investment (on the amount of the incentives) has been impressive. For example, in France EUR 12.8 has been invested in the sector for every EUR 1 of incentive provided. The UK shows that for every GBP 1 of tax relief there is an additional GBP 12 of GVA created"[152]. According to Animation UK's Oli Hyatt, "today, the value of children TV animation production in UK in a year equals to 100 M pounds, while it was only 40 M pounds the year before the introduction of tax credit incentives in UK"[153].

Although there is no sufficient data to assess the total economic impact of fiscal incentives in Europe, there are some values that can be measured that appear to be consistent in various different territories. The table below shows this fiscal impact:

132 Overview of fiscal impact of schemes

Country	Scheme	Stated Impact
Belgium	Tax Shelter	EUR 1.21 in tax return for each EUR 1 sheltered
Croatia	Cash Rebate	HRK 1.26 in government earnings for each HRK 1 of incentive disbursed
Czech Republic	FISP	Between CZK 1.5 and CZK 1.625 of return to the state for each CZK 1 of FISP received by productions
France	Crédit d'impôt cinéma	EUR 4 in taxes and social revenues for each EUR 1 of incentive granted
France	TRIP	EUR 2.1 in taxes and social revenues for each EUR 1 of incentives granted
Hungary	Indirect Subsidy	HUF 1.25 in net tax benefit for each HUF 1 sheltered
Ireland	Section 481	EUR 0.51 in fiscal return for each EUR 1 in tax foregone
Italy	Foreign Tax Credit	EUR 1.4 in VAT and income taxes for each EUR 1 in incentive granted
UK	Film Tax Credit	GBP 12 in GVA return for each GBP 1 of relief, generating GBP 498 million in tax returns

Source: Impact Analysis of fiscal incentive schemes supporting film and audiovisual production in Europe.

There is a common impression among producers that the introduction of fiscal incentive schemes might lower the direct funding available. But these schemes are in fact self-financed and, as shown above, they even generate benefits to the treasury.

Some more general notions are measurable, according to the same report[154] and industry professionals:

A) The introduction of fiscal incentives has an immediate impact in the **increase of production levels**. According to Oli Hyatt (Animation UK and Blue-Zoo): "In UK, before the Tax credit 2-3 shows were produced, and today, it's 15 shows every year." And although he does not have the numbers for UK, he cites Film London to establish that the number of productions has grown 800% in the capital"[155]. The evident risk is the inflation

[152] Impact analysis of fiscal incentive schemes supporting film and audiovisual production in Europe, a report by Jonathan Olsberg and Andrew Barnes, Olsberg SPI, published by the European Audiovisual Observatory, December 2014

[153] Personal interviews.

[154] Impact analysis of fiscal incentive schemes supporting film and audiovisual production in Europe, a report by Jonathan Olsberg and Andrew Barnes, Olsberg SPI, published by the European Audiovisual Observatory, December 2014

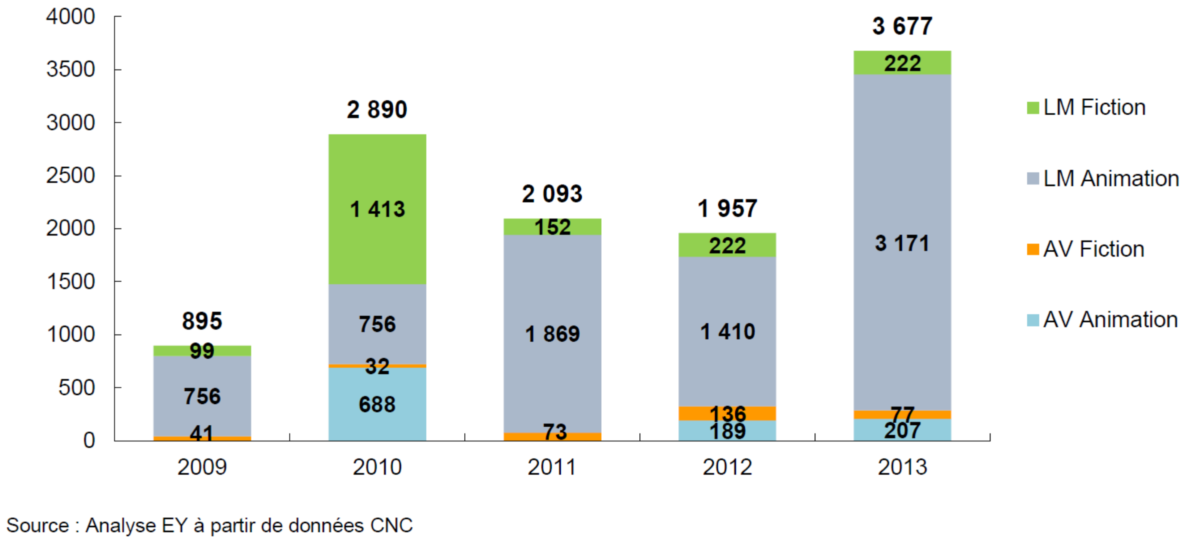
[155] Personal interviews.

of the costs. The schemes should be installed in parallel to infrastructural support schemes that would drive the growth of the industry.

B) **Full capacity utilisation** can even be reached, having the effect of attracting workforce from foreign countries. This is the case in Ireland, where Brown Bag's Cathal Gaffney defines "the issue of employment as being the downside of success; in Ireland, approximately one third of the staff comes from overseas"[156]. One of the recent improvements of Irish Section 481 in 2015 being precisely to accept as eligible the cost of all cast & crew working in Ireland, regardless of nationality.

C) **Growth in employment**: the French CNC has calculated a 38% increase in film sector employment in the period 2004-2013, and a 27% increase in the television sector[157]. The CNC also highlights that the impact of the International Tax Credit (TRIP or C2I) is particularly due to animation productions, since over 86% of the total FTEs created in 2013 were related to the animation sector (3.171 of the total 3.677)[158]. UK companies have started to produce the shows in UK again (bringing the production procedures back from Asia or America) and also, there are productions from Australia, US and Netherlands coming to UK, according to Animation UK's Oli Hyatt[159]. This phenomenon is also happening in France: Xilam's Marc du Pontavice declared in Annecy that his company is bringing back the production from Asia to France, after decades of outsourcing animation production[160].

133 Estimated number of temporary jobs created in 2013 from projects benefitting from C2I: Feature Fiction, feature animation, AV Fiction, AV Animation.



Source: CNC, évaluation des dispositifs de crédit d'impôt, 2014

[156] Personal interviews.

[157] CNC, évaluation des dispositifs de crédit d'impôt, October 2014

[158] CNC, évaluation des dispositifs de crédit d'impôt, October 2014

[159] Personal interviews.

[160] Annecy's MIFA panel of experts 'Focus on animation', June 2015.

D) **Growing skills and capacities**: tax credits favour the mobility of most skilled crews and by this promote the professionalization and the higher integration of the sector, especially in animation where some actors have managed to extend their role from service providers to concept producers, developers and distributors[161].

The future fiscal incentives

UK Red Kite's Ken Anderson: "Whilst extremely welcome and desperately needed as a driver of investment into the UK and into the animation sector, the tax credit is not the end of the story. The erosion and loss of funding by the traditional public service broadcasters of animated content, and the explosion of digital channels and online providers, means that the prices paid to acquire the content developed and produced by independent producers does not meet the costs of production"[162].

Following this same idea that each country has different tax credits, but the productions that travel better are the ones with better scripts and designs, no matter what tax incentive was behind its production, Brown Bag's Cathal Gaffney stressed the "necessity on focusing on content first"[163], a generally accepted premise.

Other producers have taken this idea one step further, suggesting as Imira's Sergi Reitg that "there is currently an auction between countries to offer the highest percentage of tax credit"[164], and that, as Blue Zoo's Oli Hyatt expressed it: "a European regulation of Tax credits and Fiscal incentives at the same level / percentages in every country, would allow the countries' competition to be based on talent"[165].

[161] CNC, évaluation des dispositifs de crédit d'impôt, October 2014

[162] "A personal experience of animation policy in practice", by Ken Anderson, in: Children's Media yearbook 2015, edited by Lynn Whitaker and Beth Hewitt, The Children's Media Foundation.

[163] Personal interviews.

[164] Personal interviews.

[165] Personal interviews.

3.3 Public funding – mandatory investments from broadcasters

Mandatory direct investments in production can apply to all broadcasters or only Public Service Broadcasters. When they are enforced, animation (or children's programming or "young audiences programming") can count as part of compliance but rarely benefits from specific obligations.

In some countries, broadcasters have the obligation of investing in national/ regional Funds for film financing (e.g. Germany with FFA) but there is no mandatory direct investment in production. Broadcasters can invest in audiovisual production voluntarily, though (e.g. Germany, Poland).

In a series of countries, direct investment from broadcasters is not mandatory whatever the category of programmes (e.g. Austria, Estonia, Iceland, Lithuania, Luxembourg, Malta, the Netherlands, or Portugal).

In other countries, there are mandatory investments from public broadcasters on audiovisual productions, but not specifically on animation. This is the case of Bulgaria, Croatia, Denmark, Slovenia (since 2011), Spain or the United Kingdom:

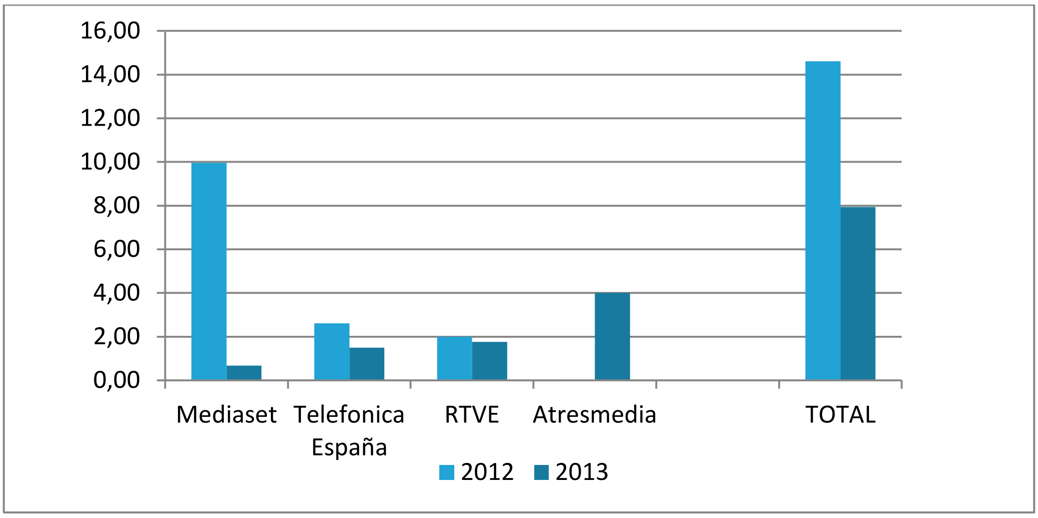
In Spain, broadcasters have the obligation to invest 5% in the production of European films for theatrical distribution and TV works of fiction, documentary or animation. Public broadcaster RTVE must invest up to 6% of its benefits. It is only compulsory to invest 50% of it on productions from independent producers. There is no specific obligation to invest in animation, but in 2013, broadcasters invested a total EUR 10,7 M in animation productions (5,7% of total invested), a 32% decrease compared to the EUR 15,6 M invested in 2012 (which represented 8,5% of total invested that same year)[166].

Animation is a two-year or three-years cycled industry. In the last two years the private broadcasters in the Spanish TV sector (Atresmedia, Mediaset and Telefonica) have been very active in co-producing the biggest (and most successful) local animated features (Tadeo, Mortadelo, Planet 51), but in an alternate way, as shown in the graph below. Their investments have been superior to public RTVE's amounts (which on the other hand have decreased). RTVE has an added difficulty since in Spain, broadcasters in co-production are obliged to pay on first broadcasting; during the crisis, RTVE has not had the cash to premiere (thus pay) the finished series they had co-produced, leaving independent producer's walking on thin ice[167].

[166] CNMC, Comisión nacional de los mercados y la competencia, Informe referido al cumplimiento de la obligación de financiar películas y series europeas en el ejercicio 2013, septiembre de 2015, and CNMC, Comisión nacional de los mercados y la competencia, Informe referido al cumplimiento de la obligación de financiar películas y series europeas en el ejercicio 2012, diciembre de 2014.

[167] http://www.audiovisual451.com/diboos-fapae-y-pate-cargan-contra-tve-por-su-politica-con-la-animacion-nacional-en-clan/

134 Investment of broadcasters in animation in 2012 and 2013, selected providers, in EUR million



Source: Obs based on CNMC reports 2014 and 2015.

United Kingdom, Public Service Broadcasters have the obligation of commissioning 25% of their broadcast time from independent producers. The last decade has seen expenditure of PSB channels (BBC, ITV, STV, UTV, Channel 4, Channel 5 and S4C) decrease by 95% from GBP 58 M in 2003 to GBP 3 M in 2013 "caused in large part by two key regulatory changes (the Communications Act 2003 that removed quotas for children's programming, and the ban on HFSS advertising to children in 2006 which removed a material part of the revenue available from such programming)", with an "overall 43% decline in PSB spend on children's commissions" and "since 2014, spend on children's programming by multichannels [ITV, Disney, Turner, Viacom…] has fallen by approximately 40%"[168].

Today there is nearly a unique buyer in the UK, the BBC, which is negative for diversity, competitiveness and available budgets. "Only for animation do the commercial PSB channels represent a substantial commissioning alternative to the BBC. However, this is by far the smallest children's genre in terms of commissioning, constituting just 9 out of the 666 first-run hours on the main five channels in 2013"[169].

Finally, a series of countries have implemented specific production obligations for animation:

In **Italy**, there are mandatory investment quotas both for public and private broadcasters to produce, finance and acquire independent European productions (including animation). RAI (public broadcaster) must invest 15% of its benefits on independent productions, 5% of which (=0,75% of total benefits) must be assigned to children's animation. RAI, with its 2 specialised TV channels (Rai YoYo and Rai Gulp) invests in animation about EUR 15 M per year. Other broadcasters should invest 10% of their proceeds to independent productions but they do not respect these obligations. As a result, RAI has become the main (almost only) investor and a decision-maker, financing naturally the products that better adjust to its editorial line. RAI's Luca Milano believes that "other partners are strongly needed" and calls for "other Italian broadcasters to invest more in animation productions"[170].

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[168] Children's television – a crisis of choice. The case for greater commercial PSB investment in Children's TV, by Robert Kenny and Tim Suter, Pact & The Ragdoll Foundation, February 2015.

[169] Children's television – a crisis of choice. The case for greater commercial PSB investment in Children's TV, by Robert Kenny and Tim Suter, Pact & The Ragdoll Foundation, February 2015

[170] Personal interviews.

In France, the main broadcasters commit to invest in animation production (see case study).

Without any mandatory obligations, several public broadcasters have implemented schemes to support animation production, e.g.:

In Greece, the public broadcaster ERT has launched every year a call for project that may also finance animation. Occasionally in the past, animated TV series or shorts were produced.

In Denmark, public broadcasters DR and TV2 must invest each DKK 65 M (EUR 8,7 M) every year to support Danish films, from which at least 25% for productions for young audiences and children.

Ireland’s RTE financial contribution to children's animation produced by independent studios hovers around EUR 500.000 per year, which means supporting 2 or 3 series[171]. In October 2015, RTE has announced an improvement of their investment in animation through: increasing up to EUR 550.000 per year; creating “a new Animated Shorts for TV Scheme (…) seeking up to five original shorts for TV broadcast”; and “a new scheme to further support Irish animation companies develop International co-production partnerships with a dedicated fund of €100,000 per annum over the next three years”[172]. Sheila de Courcy, Controller RTEjr and Cross Divisional Head of Children’s Content said, “There is a wealth of talent in Ireland’s animation industry. Over the past 10 years RTE has worked with approximately 15 Irish animation companies on 34 original series”[173].

Also, “animation is eligible for the Broadcasting Authority of Ireland's (BAI) Sound & Vision scheme (…) funded by 7% of the TV license fee. On average, the S&V scheme has awarded EUR 350.000 per animation series with typically 3 series supported each year. Since its introduction in 2006, the scheme has granted almost EUR 10 M in production funding to animation”[174].

According to Christophe Erbes, renowned animation consultant, the most active TV channels investing in animation in Europe today are: France Télévisions (see French case study at the end of the chapter), UK’s BBC (for content development but scarce international pre-acquisition or co-production), Italy’s RAI (past ten years), Catalonia’s TV3 (Spain), Finland’s YLE and Belgian Flemish VRT[175].

[171] ‘Funding Children’s animation in Ireland’, by Michael Algar, in: Children’s Media Yearbook, 2015.

[172] http://presspack.rte.ie/2015/10/14/rte-announces-increase-in-animation-sector-support-along-with-brand-new-rtejr-autumn-schedule-and-app-for-android-devices/

[173] http://presspack.rte.ie/2015/10/14/rte-announces-increase-in-animation-sector-support-along-with-brand-new-rtejr-autumn-schedule-and-app-for-android-devices/

[174] ‘Funding Children’s animation in Ireland’, by Michael Algar, in: Children’s Media Yearbook, 2015.

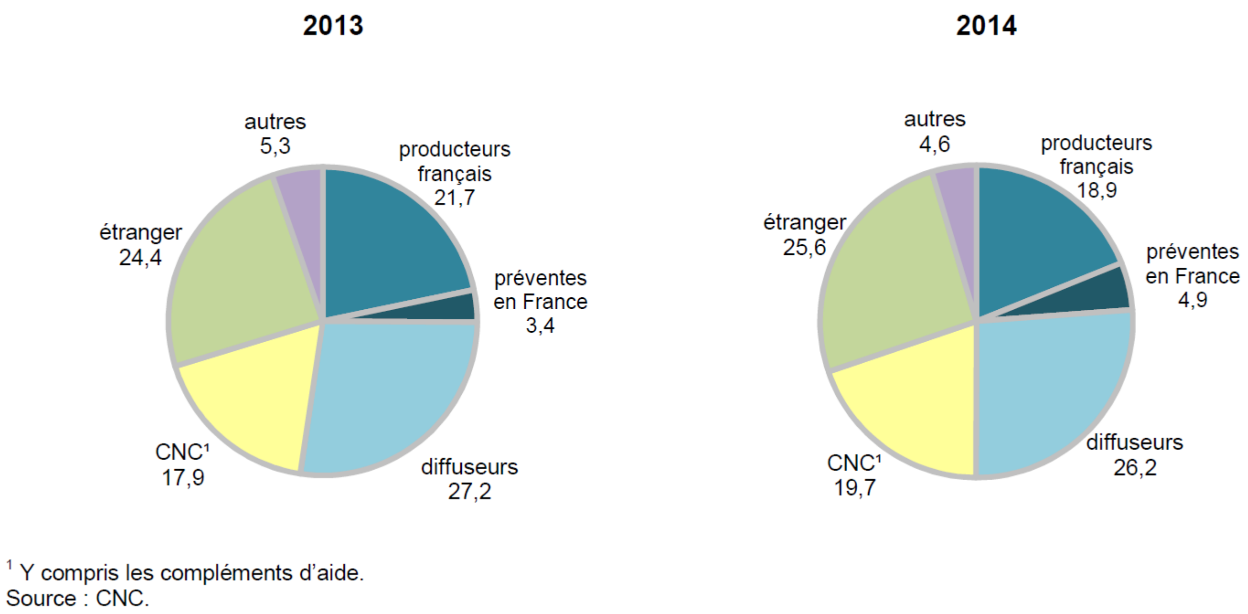
[175] Personal interviews, Christophe Erbes.

France: a country with all available funding for animation

Animation in France is a strong, established industry and the country excels in "leading the sector in Europe and occupying third place worldwide"[176].

Producers can benefit from all types of financial support schemes, general and specific, from the CNC, the State, regional funds and broadcasters.

135 Proportion of sources of finance for animation in France (2013-2014): French producers, pre-sales in France, broadcasters, CNC, foreign and others.



Source: CNC.

Specific CNC direct funds to animation:

A. Support to animated audiovisual works and digital creation (total amount for 2014 was EUR 39.784.900)

- Supports to development (automatic and selective): in 2014, 60 projects were granted EUR 2,9 M (up 33,7% compared to 2013).
- Audiovisual Innovation Fund: 32 projects received support for concept (EUR 240.000); 12 projects for writing (EUR 123.000); 8 projects for re-writing (EUR 88.000); and 19 projects received support to development (EUR 515.000).
- Fund supporting Projects for New Media: 21 animation projects (4 multi support, 8 for internet and mobile, and 9 in production) received a total sum of EUR 718.000 in 2014.

[176] CNC Results, 2014

- Supports to production of programmes (automatic, selective, advanced and complements): in 2014, 53 projects were granted EUR 35,2 M (down 7,9% compared to 2013). It covered 19,2% of total budgets that same year.
- Support to pilots: 11 projects were selected in 2014 for a total of EUR 227.000 (a slight decrease compared to 2013 with 15 pilots and EUR 273.000).

B. Support to animated theatrical works (EUR 1.800.272 in 2014)

- Support to scripts: a total EUR 60.000 was awarded to 2 animation feature scripts.
- Support to development: 6 feature projects received a total amount of EUR 294.000, which marks a strong decrease from the 15 projects that received EUR 588.000 the year before).
- Production automatic support: 9 animated feature films (5 of them majority French) were authorised and automatic support was put together for two of them for a total EUR 84.272.
- Animated shorts: 20 projects have received EUR 1.362.000.

C. Transversal support to production, video and technical industries (total: EUR 3.853.830 in 2014)

- Support to new technologies in production: 24 animated projects (or projects including animated sequences) received a total EUR 2,12 M in 2014.
- Selective support to Video/ DVD/ Blue-ray Disc: 42 animated works were granted a total EUR 239.230.
- Selective support to VoD: a catalogue with 408 hours of animation received EUR 100.000 in 2014, and 4 animation titles received support to VoD distribution (EUR 4.600).
- Support to technical industries: 20 companies related to animation received EUR 1,11 M in 2014.
- Support to R&D in audiovisual and multimedia: through the RIAM network and in collaboration with Bpifrance, 4 projects received support in 2014, for a total EUR 0,28 M (EUR 0,18 M of which from the CNC).

D. Support to export and promotion (EUR 673.200 in 2014)

- Support to export of audiovisual programmes: 13 distribution companies received support to a level of EUR 487.700. It is important to highlight that **animation works supported represented 31% of total**.
- Support to export of theatrical feature films: 10 animation films received EUR 185.500 in 2014.
- CNC also supports different events and organisations, such as: Annecy film festival and MIFA; Cartoon Movie and Forum (since their establishment in Lyon and Toulouse respectively); TV France International; and Unifrance Films.

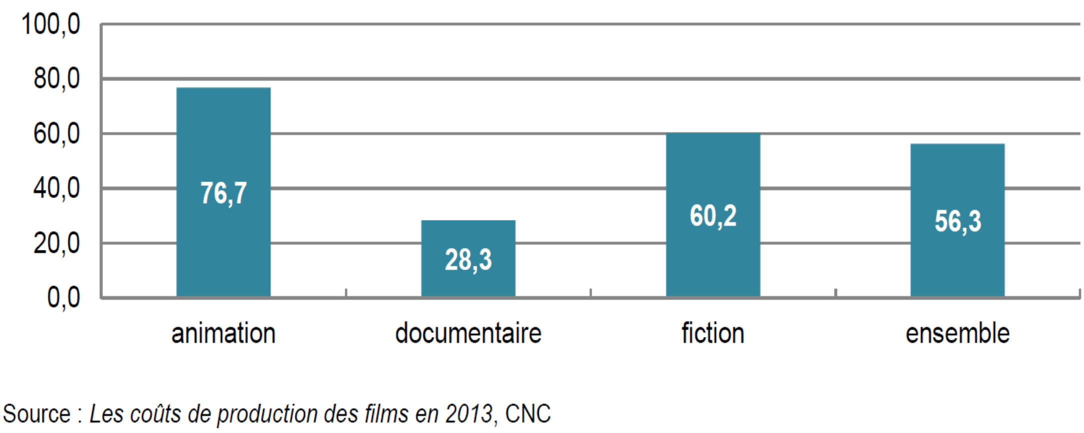
Tax Credits and Tax Shelter

France has 1 Tax Shelter (SOFICAs) and 4 different Tax Credits that operate alongside other direct funding from the CNC:

A. SOFICAs (Sociétés de financement de l'industrie cinématographique et de l'audiovisuel) must invest 90% of their collected funds into films or television production. 12 SOFICA companies were active in 2014 (compared with 15 in 2013) and they invested EUR 2,2 M in animation films, a 42% decrease compared to the EUR 3,8 M invested in 2013[177].

B. Cinema Tax Credit (or crédit d'impôt cinema – CIC): created in 2004, it was revised in 2013 from 20 to 25%, "with the objective of long-term repatriation of animation films and TV series in order to make the French animation sector more competitive at the international level"[178], although the effects of this improvement are not yet visible, due to the long production process of animation. According to CNC reports, 76,7% of animation films use this incentive"[179].

136 Proportion of works benefiting from the Cinema Tax Credit in France (2005-2013)



Source: CNC, évaluation des dispositifs de crédit d'impôt, 2014

- Audiovisual Tax Credit (or crédit d'impôt audiovisuel - CIA): created in 2005 and reinforced in 2012 to make it more attractive by raising of the cap to 1.300€ per minute of animation. There is a minimum budget of EUR 3.000 per minute of animation. In 2013, 68% of animation works benefited from the measure[180]. The amendments to the Law in 2014 (submitted to the EC for approval and to become effective in 2016) will see the incentive rise from 20 to 25% and the cap per minute of animation from EUR 1.300 to EUR 3.000[181].

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[177] CNC Results 2014.

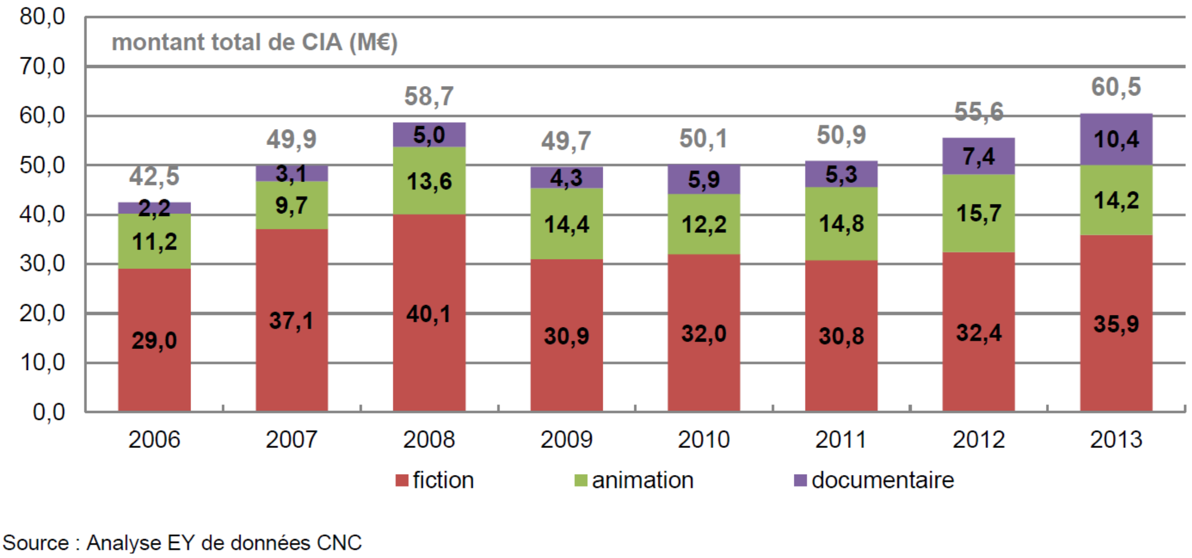
[178] Impact analysis of fiscal incentive schemes supporting film and audiovisual production in Europe, a report by Jonathan Olsberg and Andrew Barnes, Olsberg SPI, published by the European Audiovisual Observatory, December 2014.

[179] CNC, évaluation des dispositifs de crédit d'impôt, October 2014

[180] CNC, évaluation des dispositifs de crédit d'impôt, October 2014.

[181] CNC Results 2014.

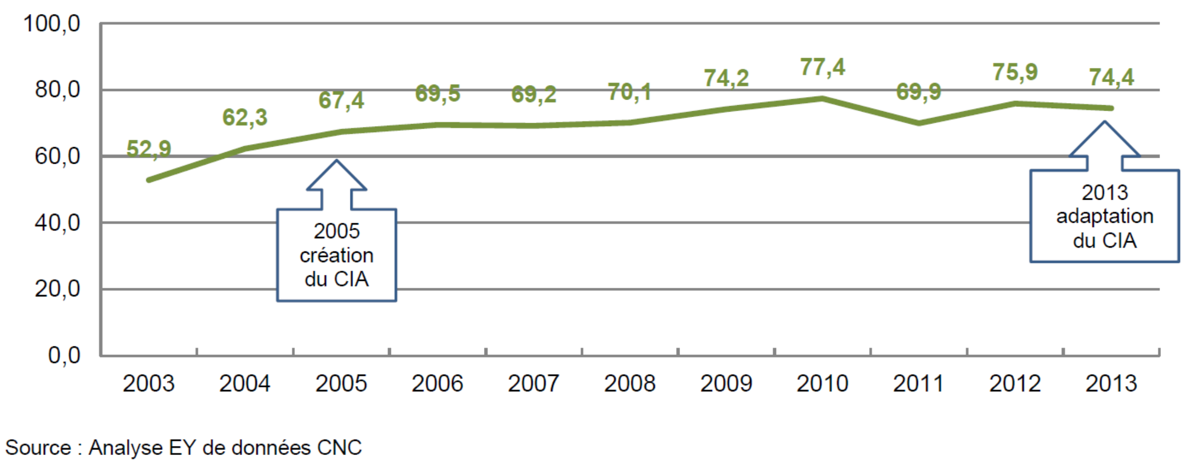
137 Evolution of amounts granted to Audiovisual Tax Credit (in millions)



Source: CNC, évaluation des dispositifs de crédit d'impôt, 2014

The Audiovisual Tax Credit has favoured the re-localization in France of the different animation production stages, and the creation (and maintenance) of Regional competency centres, like Pôle Image Magelis in Angouleme or La Cartoucherie in Bourg-lès-Valence[182].

138 Proportion of costs incurred in France for French animation audiovisual works, 2003-2013.



Source: CNC, évaluation des dispositifs de crédit d'impôt, 2014

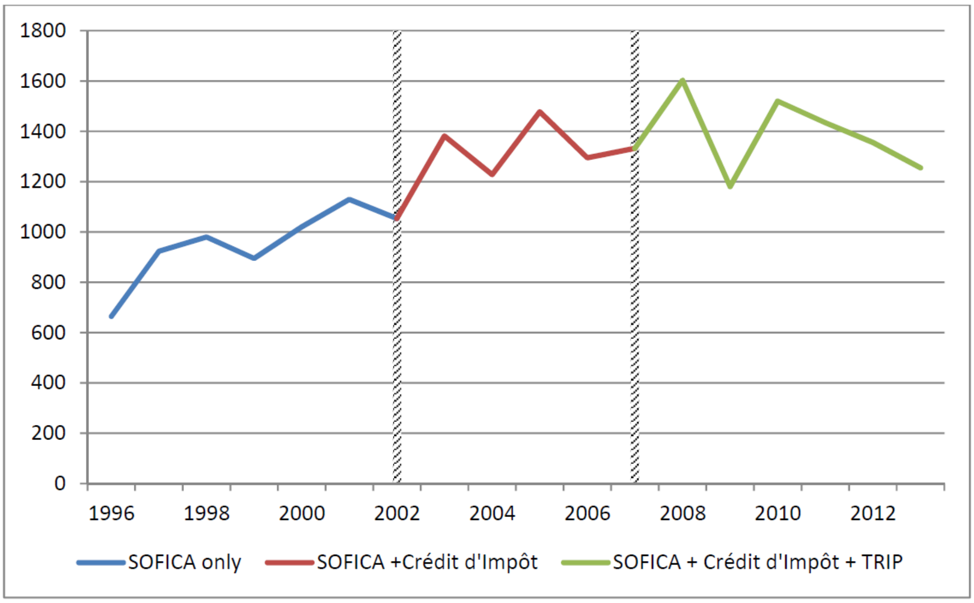
- International Tax Credit (or TRIP, or C2I): was created in 2009 to promote the shootings and the production of foreign features in France (fiction and animation), it covers up to 20% of French expenditures and can reach EUR 20 M. In 2014, 2 animated TV series were the beneficiaries to this support for a total provisory investment in France of EUR 3 M. From

[182] CNC, évaluation des dispositifs de crédit d'impôt, October 2014.

January 1st 2016, it will cover up to 30% and will reach EUR 30 M[183]. Thanks to this support, French companies were able to compete at international level. It was in 2009 that Universal decided for the first time to produce an animated feature in France ("Despicable Me"), done in its majority at Mac Guff. The success of the film led Universal to acquire the French studio (now Illumination Mac Guff) and Chris Meledandri (Director Illumination Entertainment at Universal) declared that "Universal came to France for the talent, but stayed for the C2I"[184]. Employees grew from 150 people in 2008 to almost 600 in 2014.[185]

- Videogames Tax Credit: installed in 2008, it does not apply to animation.

139 France: film sector spending, 1996-2013 (in millions, 2013 prices)



Source: SPI analysis of CNC Data

Source: Impact Analysis of fiscal incentive schemes supporting film and audiovisual production in Europe.

Mandatory direct investments from broadcasters

The investment obligations for public broadcasters are regulated by Law since 1986.

The Animation Film Producers' Guild (or SPFA in its French translation) can sign deals with broadcasters' networks (public and private) to set a minimum quota of investment for animation. For example, in 2014 France Televisions committed to invest EUR 29M in animation.

In 2014, the contribution from broadcasters to animated TV programmes amounted to EUR 46,7 M (19,4% decrease compared to 2013) and covered an average of 26,2% of the budgets. This investment represents an average of EUR 179.600 per hour of animation.

[183] Impact analysis of fiscal incentive schemes supporting film and audiovisual production in Europe, a report by Jonathan Olsberg and Andrew Barnes, Olsberg SPI, published by the European Audiovisual Observatory, December 2014.

[184] CNC, évaluation des dispositifs de crédit d'impôt, October 2014.

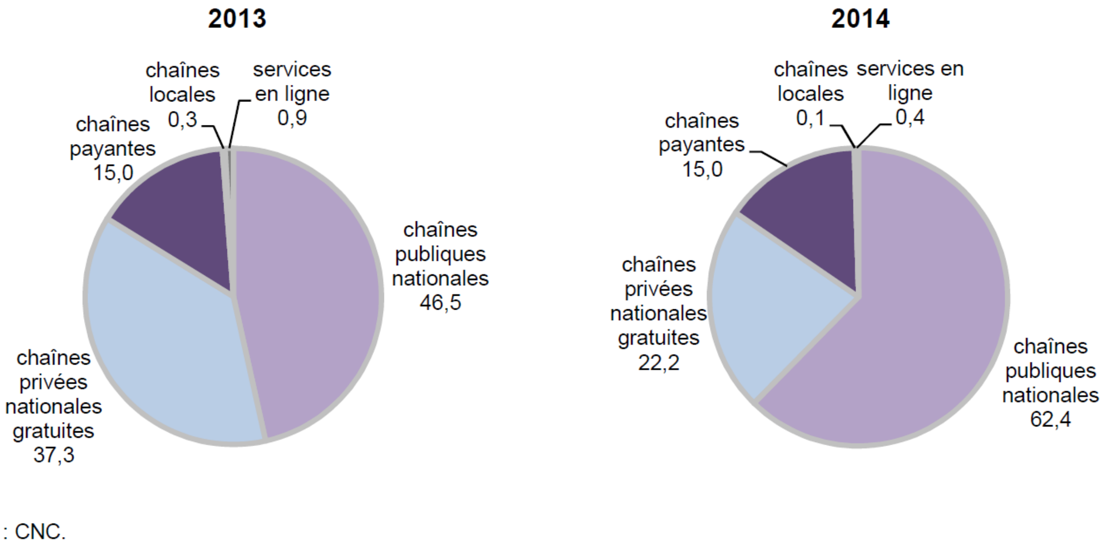
[185] CNC, évaluation des dispositifs de crédit d'impôt, October 2014.

National Free channels sum up 84,6% of investments in animation production in France in 2014 (EUR 39,5 M):

- National public channels (France Télévisions and ARTE) contributed with 151 commissioned hours and EUR 29,13 M invested. France Télévisions alone invested EUR 27,73 M, which represents 59,4% of total invested by broadcasters in animation in 2014.
- National free private channels (M6, TF1, Gulli and 6ter) contributed with 82 commissioned hours and EUR 10,37 M invested.

National Pay-TV channels (Canal+ and the thematic channels: Canal J, Disney Channel, Game One, Piwi+, Télétoon+ and TiJi) sum up 15% of investments in animation production in France in 2014, with 126 commissioned hours and EUR 7 M invested.

140 Proportion of investment in animation programmes, by type of broadcaster (2013-2014): national public channels, national free private channels, Pay-TV channels, local channels and online services



Source: CNC

Investment from local/ regional channels can be considered almost non-existent with no animation hours commissioned in 2014 and after a decrease of investment from 2013 (EUR 170.000) to 2014 (EUR 40.000).

4.Training

- Training in the animation sector faces the challenge of fast evolving technologies. Answers to this challenge include the specialisation of certain animation schools in 3D animation; tailored professional training sessions and online training.
- In response to the lack of a qualified workforce, some schools or training programmes are backed by animation studios or even created by an animation studio.
- Animation is increasingly integrated as one of the specialisations of schools addressing also video games, digital effects or software development.
- The employability of animation students can be fostered by the use of English as a teaching language, exchanges or joint projects between European schools.

4.1 Types of training in animation

Animation has not always necessarily required a formal training to enter the profession and until recently many turned to animation after completing education in a more general domain in the arts. Academic diplomas might have little value to the industry if not supported by a good portfolio. However, since breaking into the field as an animator or a 3D artist has become more and more competitive, specialised education is usually the preferred choice to start. Apart from providing the students specific skills and training in animation, schools and educational institutions make up for a valuable context where to make connections and create a network that can lead to a future career, offering students guidance from more experienced artists.

Animation training in Europe is available in a variety of forms, ranging from initial training and traditional academic degree programmes (certificates, diplomas, bachelor's and master's degrees) to specialised courses aimed at professionals, offered by both public and private institutions. Professional training is usually workshop-based and teachers are recruited among well-known specialists working in the industry. Other kinds of training are also available, usually in the form of short seminars, workshops, summer schools and master classes held at festivals or events. It is also clear that the internet has deeply changed the rules when it comes to learning and sharing knowledge. With the development in videoconference tools, online training is also becoming popular and some schools and professionals deliver online lectures, tutorials or mentoring services for individuals or small groups. Informal education and self-learning might play a relevant role as many animation students and professionals regularly publish video tutorials and share tips and techniques. Many animators appear to be self-taught at a certain point of their studies and video-tutorials represent a highly flexible learning opportunity for those who cannot be on a campus.

Well-established educational institutions such as the **La Fémis**, the **École Émile Cohl** in France or the **National Film and Television School** in the UK enjoy a strong reputation and their graduates benefit from the institution's prestige in terms of networking opportunities, placements and visibility at festivals. Students normally have to go through a highly competitive selection process in order to be admitted. Classes are generally small and this allows for students to be placed in the industry after their diploma. The short animated films produced by the students of prestigious French school of **Gobelins**, for instance, open the official screenings at **Annecy International Animated Film Festival** as curtain-raisers.

For a long time animation was typically regarded as a part of fine arts departments and certain schools still put an emphasis on artistic expression, requiring a good proficiency in drawing to be admitted. The rise of 3D has enormously changed this scenario, introducing new professional specialisations that require a high level of technical expertise (character and motion design, modeling). Even schools typically oriented towards classical animation rather than on visual effects now offer programmes in 3D animation and visual effects. Although animation is becoming an increasingly technical field and training programmes are becoming more and more specialised (especially for CG animation), most schools seek a balance between the artistic and technical side and aim to provide students with a global perspective that touches upon related disciplines (comics, illustration, cinema, visual design, photography). Academic programmes can result in bachelors and masters of Fine Arts or Applies Science. In some institutions, subjects such as 3D and visual effects might be conflated into computer science or computer graphics departments**. Bournemouth University**, for instance, runs the **National Centre for Computer Animation (NCCA)**, offering a variety of bachelor's and master's courses in computer animation, digital effects and software development animation and games.

Some schools have now decided to exclusively focus on 3D. This is the case of the **ESMA (Ecole Supérieure des Métiers Artistiques)**. With its three campuses in Montpellier, Toulouse and Nantes, ESMA is one of the leading educational institutions of its kind in France. The 5-year programme in 3D animation and special effects covers every phase of project production and includes a compulsory traineeship in an animation studio. The school has very selective standards and boasts very high employment rates among alumni (93% six months and 100% a year after graduation). Aspiring students have to submit a portfolio and must have studied fine arts for at least a year during their high school. Students have to go through further selection during their studies and only half of those who have enrolled in the first year complete the animation programme, while the other half switch to other areas of study, such as illustration. Students graduation projects are often presented at international festivals over the world and many are awarded prizes. As an example, former students' short film *Amir & Amira* obtained the Jury's Choice at SIGGRAPH 2015 and *Sweet Cocoon* was nominated for the 2015 Oscar in the short film section.

In most generalist programmes, students are first provided with an overview of different techniques and they can choose a specialisation field later on, after having acquired some basic animation skills. At the animation programme at the Italian **Centro Sperimentale di Cinematografia**[186] **(CSC),** students start attending a general curriculum, spending the first year learning about the fundamentals of animation. From the second year on, they can pick optional courses and might choose to specialise in 3D. However, the school has no formal separation between 2D and 3D and the programme is flexible enough to be adapted to each student's talents and needs.

4.2 Trends in education

Building up strong connections with the industry

One of the most striking trends in animation education in Europe is the increasing focus on the industry: schools are more and more interwoven with industry and they are building stronger connections with the employers. Education providers are now looking for new ways to bridge the gap between education and the world of employment, creating synergies and continuity between these two domains. Many schools invite professionals from the industry to teach courses as guest lecturers, which allows for these programmes to keep abreast of new tendencies and change along with the industry.

[186] Experimental Film Centre.

Big animation groups might even set up their own schools, so that their own human resources can be trained in-house. This allows the students to use advanced technologies and facilities and boost their chances to keep working with the same company after finishing their studies. Italian **Rainbow S.r.l.** for instance, created its own training centre in Rome (**Rainbow Academy**), as part of the company's studio, offering professional training in 3D digital production along with specialised online courses. Sometimes educational providers join forces with the giants of the industry. This is the case of the renowned British **National Film and Television School (NFTS)**, who offers an intensive 3-months programme in character animation, taking place at **Aardman**'s in Bristol and taught by the studio's practicing animators.

In a similar way, the Spanish **U-Tad (Centro Universitario de Tecnología y Arte Digital)**, was created in partnership with ILION, one of the biggest animation studios in Spain. Delivering training in the major fields of the digital economy (Digital Business, Engineering and Art & Design), U-Tad was the first animation programme that gained the status of university degree in Spain. Created in 2012, it offers courses in animation, graphic design, games design as well as a specialised management programme for digital businesses, which allows students from different areas to team up together for their final projects. The school aims at covering the full spectrum of the discipline concerning animation (software, anatomy, modeling, drawing, character design) so that students are provided with a solid and artistic background to master the language of animation and experiment with it. The partnership with ILION guarantees a work-based educational approach, strongly focused on the current needs of the industry: teachers are recruited among animation professionals and students are using software and hardware facilities that they will use later on for their jobs in actual studios. Students go through a full immersion during their studies and all of them carry out internships, in Spain or abroad.

Another animation school that was founded to closely meet the needs of the industry is **La Poudrière**. Set in Valence, France, the school was created in 1999 on the initiative of Jacques-Rémy Girerd, already founder of the highly reputed **Folimage**. While legally and financially independent from the studio, the school certainly benefits from its proximity. La Poudrière offers a two-year graduate programme targeted at students who already have some knowledge in the field. The course is specialised in film directing and welcomes each year a class of ten students tutored by the industry professionals, which ensures that the learning process is strictly work-based. The school also features a 3-month European programme, a MEDIA-funded professional training course jointly managed with the Danish Animation Workshop, focusing on scriptwriting for commissioned films and literary adaptation. Participants work on concept development for TV and web series and on scriptwriting for TV specials based on children's books. The course wants to confront students with the practical reality of the profession, and the teaching method is based on teamwork, highlighting the importance of collaboration between different roles. The projects are finally presented during a pitching exercise, where a jury of professionals assesses their interest and feasibility. This formula has proved to be really successful, as several students projects have developed into professional works, like *Ariol and Michel*, a TV series adapted from children's books produced by Folimage with Bayard Jeunesse

These connections between education and the industry might also be coupled with a broader investment in a certain geographic area, as in the case of **Pôle Image Magelis**, a media development conglomerate focusing on animation, film, comics and videogames. Set in Angoulême in 1997 as the first structure of its kind in France, the group aims at promoting the creative sector and supporting media companies in its region, and also established a Creative Media Campus comprising seven public higher education institutions in Angoulême, one of which, the **Ecole des Métiers du Cinéma d'Animation (EMCA)**, provides high-level training in animation. This synergy between educational institutions and the industry allowed Angouleme to attract teams of professionals, becoming one of the largest productions centres for animated images in France.

Animation training in a global setting

In an increasing number of animation schools in Europe, courses are entirely taught in English, which proves that education institutions are increasingly oriented towards an international dimension of the industry and the profession.

An example that brilliantly represents this trend is the **Animation Workshop**, a Danish school founded in 1989 in Viborg as an independent management unit under VIA University College. Striving to create a strong network of international companies, artists and professionals, the school has become one of the leading educational providers for animation training and related activities in Europe. One of its assets is the great variety of educational opportunities available, since its study catalogue offers courses at different levels, from initial and academic courses to advanced professional training. The school has also the merit of covering all the areas of expertise involved in animation, integrating its different aspects, subjects and techniques. This ensures that animation is understood and recognised in its broader value, both as a complex industry and as a tool of artistic expression. Students intending to pursue a bachelor's degree can choose to focus on Character Animation, Computer Graphic Arts or Graphic Storytelling. Short intensive programmes are available to professionals who wish to specialise in 3D character animation, visual effects or in animated documentary filmmaking. While paying close attention to visual effects and new technologies, the Animation Studio still offers training in classical drawing, available as one-semester courses or summer and week end workshops. The school also manages a 3-year youth programme for those who want to specialise in visual learning and communication while preparing a regular Secondary Education curriculum. The course allows students to approach visual arts and communication early on, representing the ideal preparatory path to pursue further studies within the creative or artistic field.

In addition, the school is responsible for the **Open Workshop**, an artistic residency centre focused on the promotion of emerging talents supported by the Danish Film Institute, the Viborg Kommune and Shareplay. The centre functions as a production catalyst for animation, film, games and cross media projects and is aimed at helping young artists and professionals in the development of their projects.

The school is well aware of the importance of establishing a high-level profile and a network of global connections. In order to better prepare the students for the challenges and demands of their future career paths, programmes are taught in English by international professionals, including experts from prominent production companies worldwide. Internships are part of the study course and students may choose to embark on traineeships abroad as the school has developed strong connections with different studios worldwide. During the courses, students not only work on assignments but are also involved in larger production teams in cooperation with a number of European partner institutions.

Seeking to strengthen the link between the animation industry and education providers, the Animation Workshop is one of the organisers of **Animation Sans Frontières (ASF)**, a training programme supported by **Creative Europe – MEDIA**. The programme is jointly run with other three prestigious European animation film schools: the **Filmakademie Baden-Württemberg** in Germany, the **Moholy-Nagy University of Art and Design (MOME)** in Hungary and **Gobelins** in France. This unique 8-week programme is open to students from all European filmmaking and animation schools and is designed to provide graduate animation students with a better understanding of production and marketing dynamics. Students are hosted for two weeks by each of the partner institutions. Through study visits, lectures and workshops, they have the opportunity to learn firsthand about the industry, getting an overview of all the steps of the production process: the German and Hungarian modules focus on project development, while study sessions in France and Denmark revolve around co-production, project presentation and pitching.

Learning never ends: continuous and professional training

Working in animation requires constant study, as technologies and software rapidly evolve. Continuous learning is necessary and specific training initiatives are available to address the need for professionals to keep abreast of advances. Furthermore, academic training tends to be mostly individual-based and this might not entirely reflect the actual demands of the professional world, where team work is key. Professional training puts a strong emphasis on team collaboration and is usually project-based, recreating the experience of collaborating under time pressure with the supervision of a film director.

*O*ne of the most accredited programmes of this kind is **Anomalia**, a summer school taking place in the Czech town of Litomyšl and run by the Czech multimedia company **3BOHEMIANS**. The school is targeted at those who are already working in the field and at animators previously trained in 2D animation who need further training in advanced 3D techniques. The course is also useful to young graduates and junior animators that lack hands-on experience and want to advance faster in a particular area under the guidance of experienced professionals from top animation studios worldwide.

A number of similar initiatives have been put in place across Europe to help young professionals meet the industry's expectations and fit quicker in a studio environment. One of them is the Irish **Animation Skillnet**, that offers companies and freelancers working in the sector subsidised, bespoke training courses in animation, games and visual effects, delivered by industry specialists. Animation Skillnet is also responsible for the **Bridge Programme**, an intensive 8-week training aimed at preparing "industry ready specialists" for the animation and games sectors in Ireland, organised in partnership with **Dublin Business Innovation Centre**, **Screen Training Ireland** and the **Irish Film Board**. In addition, Animation Skillnet has launched a 12-month traineeship programme in animation and visual effects, organised in collaboration with Screen Training Ireland, combining core animation knowledge with studio-specific skills.

On a European level, MEDIA-financed **Cartoon** runs the **Cartoon Masters**, a series of high-level seminars open to animation professionals. Based on case studies, they provide participants with a sound understanding of issues of topical interest in the industry, such as financing models (Cartoon Business), digital animation (Cartoon Digital) and cross-media projects (Cartoon 360). In 2015, Cartoon launched **Cartoon Springboard**, a new pitching event specifically designed for young graduates from European animation schools, consisting of a 3-day programme of project-based activities aimed at speeding up their access to the animation industry.

5.Festivals and awards

- A large array of festivals dedicated to animation is organised in Europe and they usually include a marketplace and conferences. Beyond the traditional “master classes”, some festivals tend to develop a large training offer.
- Animation festivals tend to increase their scope by integrating both programmes aimed at adult audiences and niche programming (e.g. animated documentaries).
- Animation is also increasingly well-represented within other festivals with a focus on children, but also on documentaries or on music.
- Festivals with the focus on image technologies also tend to integrate animation, often together with video games or special effects.

5.1 New trends in animation festivals

Even if internationally renowned film festivals often include specific sections dedicated to animation productions, a growing number of events exclusively focus on animation, treating it as an independent artistic and business sector instead of a film subgenre. From well established players such as the **Annecy International Animated Film Festival** to newly created small events, an increasing number of animation festivals are taking place across Europe.

An interesting example is **Anima Brussels**, the Brussels International Animation Film Festival, a 10 days event that includes a variety of activities targeting both children and young audiences: workshops, masterclasses and exhibitions on the art of animation as well as encounters and talks with animation filmmakers. The festival takes place in Brussels but part of the screenings are shown simultaneously in other Belgian cities.

Animation festivals are increasingly being structured as “total events” as they integrate different aspects in order to respond to the industry’s needs. They will usually feature a market area where to find co-production partners and sell films, training activities such as masterclasses and workshops, conferences and debates, along with the traditional screenings and showcasing of films. These events make excellent networking hubs for animation professionals and students, providing them with valuable opportunities to meet and forge new contacts, pitch ideas and discuss current trends.

An example of this trend is the **Stuttgart International Festival of Animated Film (ITFS**), organised by the German **Filmakademie Baden-Württemberg** that has developed into a significant meeting point for animation professionals and students. It features a Conference on Animation, Effects, Games and Transmedia as well as an Animation Production Day, a business platform for the financing and development of animated projects where producers can pitch their films to distributors and TV channels and find potential partners for co-productions.

Another leading animation event is the **Encounters Short Film and Animation Festival**, the longest running competitive festival in the UK. Set in Bristol, it showcases animation short and feature films over 6 days every year and also offers an industry forum for professionals with events, masterclasses, talks and panel discussions, with an eye to emerging trends in a fast moving digital world.

Some festivals have developed significant training opportunities. One of them is **Animated Dreams**, the oldest and biggest animation film festival in Estonia. Created in 1999, it has come to be the most famous animation festival in the Baltic area. In 2011 the festival launched **Anima Campus Tallinn**, an international networking and training event for young animated film professionals, taking place over five days during the festival.

Most festivals have a clear focus on young audiences, and normally include at least a section on children animation. Some are specifically dedicated to children and kids' productions, like **Cartoons on the Bay**, a yearly festival for TV and cross-media animation held in Venice. Organised by Italian public broadcaster RAI, it gathers together producers, commissioners and authors. The "Pulcinella Awards" are given for each category of competition: TV series for preschool, kids, tweens and young audiences, TV pilots, interactive animation, educational works, advertising and short films.

When it comes to children's animation, the place to be in Europe is doubtlessly the **Cinekid Festival**, the largest event of its kind in Europe. Organised in Amsterdam each year and encompassing film, television and new media productions for kids, **Cinekid** also includes a significant number of animation projects.

Although commercial and children's animation represent most of the projects showcased at festivals and markets, animation is expanding its audience outside the traditional young target and art-house animation films are becoming popular among the general public. In recent years, there has been growing interest for animation for grown-ups, also spurred by successful features such as The Triplets of Belleville, Persepolis or Waltz with Bashir. Formerly niche products, such non-narrative animation and animated documentaries are now becoming popular in festival venues, proving the medium's expressive potential even outside the traditional formats and scope. **DOK Leipzig International Festival for Documentary and Animated Film**, for example, has a dedicated section for animated documentaries and many festivals, like the **KLIK! Amsterdam Animation Festival**, have a specific section for animated music videos.

Finally, it is noteworthy to mention the rising popularity of events and festivals focusing on video games, special effects and digital culture alongside animation. These events revolve around the booming interest in new technologies and often adopt a highly technical, future-oriented approach and highlight the interplay between animation and other cognate areas (games, special effects, and computer graphics). This is the case, for instance, of **Future Film Festival**, which takes place every year in Bologna and has become the most prominent Italian event for animation and special effects. The festival brings together artists, directors and producers and offers retrospectives about sci-fi and the history of animated film, as well as events and debates on new technologies and transmedia.

Another relevant event to animation professionals is **Power to the Pixel**. Held every year in London it displays a full array of activities related to transmedia storytelling and innovative practices for media industries in the digital age. It offers a Cross-media Forum, a market, a conference, a training programme and several talks gathering experts from different fields. Other notable examples of festivals across Europe focusing on 3D animation, gaming and computer graphics are **3DWire** and **Mundos Digitales** in Spain, **Pixel Vienna** in Austria, **View Conference** in Italy and **BLON**[187] **Animation and Video Games Festival** in Lithuania.

Annecy International Animated Film Festival

With its annual **International Animated Film Festival**, the French city of Annecy has arguably become the place of reference for animation in Europe. The festival was created in 1960 and is now organised by **CITIA**, a public establishment active in the field of cultural cooperation. Each year in June, it brings together for a week the ensemble of the players operating in the animation industry, displaying a rich programme of initiatives, including exhibitions, meetings, conferences and keynotes targeted at cinema, TV and multimedia professionals.

[187] Beautiful Land of Nevermind – Baltic Sea and Nordic region animation and video games festival.

The official competition is open to animated works using various techniques and classified in different categories (feature films, shorts, TV and commissioned films, graduation films and special prizes) and attracts a significant number of submissions: in 2015 the festival received over 2,600 films from all over the world among which 200 were shortlisted for the official selection. The films selected for the competition are screened in various cinemas around Annecy, and night open-air projections are also organised during the festival week.

The festival's flagship event is certainly its **International Animated Film Market (MIFA)**, representing the foremost showcase for the industry professionals in Europe. The creation of the MIFA dates back to 1985 and, in the words of the then French Minister of Culture Jack Lange arose "from the need to acknowledge the evolution of the entire sector, in particular of its economic aspects" as it set out to be "a landmark event for professionals worldwide, a unique opportunity to present their projects and productions"[188].

Welcoming numerous international exhibitors every year (more than 550 in 2015), the MIFA aims at acting as a market catalyst for the sector, encouraging networking opportunities and fostering industry relationships. Every year the MIFA launches a call for animation projects in early stages of development, grouped by different categories (long features, short films, TV series and specials, transmedia). The selected projects are then presented during pitching sessions to facilitate the producing, purchasing, financing and distribution across broadcasting platforms. The MIFA also offers press conferences, workshops and an animation video library accessible through dedicated screening units, which helps producers promote their projects and have direct contacts with buyers.

Finally, the market is also looking at students and new graduates, offering recruitment sessions that allow an exchange between companies and new talents.

Cinekid Festival

Set in Amsterdam, the **Cinekid Film, Television and New Media Festival** is the largest international media festival for children aged from 4 to 14. Started as a small children's film festival, it has developed into an organisation (the Cinekid Foundation) that is responsible for a wide range of activities for children during the course of the year, while the main festival takes place every autumn during the school holidays.

Exhibiting a successful mixture of elements (film, TV, new media, live action, animation), the festival screens more than 500 productions from all over the world every year, spanning from feature films to TV series, from animation to documentaries and cross media productions. The festival is attended by over 50.000 children, parents and international guests every year and it is preceded by a series of school screening and a satellite programme held in different city across the Netherlands (Cinekid on Location). Keeping a strong focus on media education and audience engagement, the festival aims at improving the quality of the media culture scenario for children, boosting their creativity and active participation, with an eye on innovative practices and technologies. During the event, children are encouraged to actively take part in discussions, voting sessions and creative workshops.

A parallel section for media professionals (**Cinekid for Professional**) brings together TV buyers, producers, distributors and sales agents, directors and animators in order to facilitate co-productions and help industry professional expand their networks. The section features a co-production market with a selection of films and television programmes and also includes a full day conference focusing on currents trends and best practices and featuring talks and panels on different topics, from technological development to storytelling. Cinekid for Professional also offers seminars on topical

[188] *Le Festival international du film d'animation: 50 ans d'une histoire animée* by Dominique Puthod, 2015

interests, such as one on educational apps for children, and a **Media Literacy seminar**, co-organised with the EYE Film Institute, addressing game-based learning, peer-to-peer engagement and rights issues.

While the festival focuses on different genres, animation plays a significant role in the programme and the event pays close attention to the interplay between animation and live action and their reciprocal influences. The festival 2015 edition for instance, offered a Masterclass on Children's animation, providing "an exchange of knowledge and skills between live action scriptwriters and animators" as well as "inspiration and know-how about writing scripts for children's animation for both live action filmmakers and animators"[189].

Since 2014, Cinekid for Professionals also runs a **Script LAB**, a high caliber training programme targeting children's media authors. Co-organised with other European film institutions[190], the initiative allows a group of writers and directors (one for each co-funding institution), to develop their children's feature films (both live-action and animation) receiving personalised coaching. The first part of the training programmes takes place in Amsterdam in October, prior to the festival, while the second part is set in in Berlin in February, just before the **Berlin International Film Festival**.

3D Wire

Bringing together more than 15,000 attendees between professionals and visitors in Segovia every autumn, **3D WIRE** is the biggest animation and video games event in Spain. Launched in 2010, it purports to explore recent advances in the field of videogames, animation and computer graphics and introduce cutting edge technological applications to the audience.

Along with the traditional festival screenings and presentations on animation, games and new media, the festival features conferences, masterclasses and workshops as well as exhibitions and professional consulting sessions targeting a mainly professional audience.

For the official festival competition, prises are awarded to animated short films for the national, European and international categories. The competition also has special sections for innovative video games, applications and transmedia projects.

Functioning as a creative hub and a meeting point, this initiative wants to create a productive synergy between animation and related fields such as video games and new media in a fast moving industry, highlighting new trends and sharing innovative practices in digital entertainment. The boundaries between different fields are becoming blurred, which can be extremely positive. According to José Luis Farias, Director of 3D Wire International Market: "From a technical point of view, animation has a lot in common with videogames and many professionals can work easily in both sectors. As it is a powerful storytelling tool, animation is one step ahead of other technologies and is going to play a huge role in virtualization and augmented reality. On the other hand, new technologies such 3D printers are changing the way animation is done: in short, there is a mutually beneficial interplay between the way technologies and animation can influence each other. Animation is appearing everywhere, and is not only on TV or in movie theatres in the forms we are used to, but will also appear on new types of screens and platforms"[191]. This seems to confirm the general trend that the animation, in its different applications, is bound to attract a larger and more general audience than the traditionally young public.

[189] Cinekid 2015 Leaflet http://www.cinekid.nl/sites/cinekid.nl/files/bijlage/programme_leaflet_2015_def.pdf

[190] Flanders Audiovisual Film Fund, Norwegian Film Institute, Swedish Film Institute, Netherlands Film Fund and Icelandic Film Institute, the Finnish Film Foundation and the German Federal Film Board.

[191] OBS personal interviews.

3D Wire also offers an International **Short Film Market** with a selection of more than 200 animated works from all over the world, available through a video library with several screening booths for the use of professionals. Through specific B2B meetings and a pitching area for projects, the event helps putting in contact the industry’s key players (TV channels, distributors, producers) in order to facilitate co-productions as well as the marketing of new projects and the discovering of emerging talents.

One of the festival’s objectives is to support the European animation market, boosting the sector’s capacity to operate transnationally and helping the industry to create strong IP transmedia projects. It also wants to promote competitiveness and innovation by providing personalised advice to young European companies through dedicated consulting sessions and organising networking activities and to help them find relevant partners to develop their businesses. Finally, the festival also focuses on audience development, providing a set of training activities, screenings and animators’ competitions for young participants during the festival and throughout the year.

5.2 Animation awards and other success indicators

Film awards

141 Films nominated to the European Film Award for Best Animated Feature ● 2010-2014

Rank	Film	Country of origin	Production year	Director	EUR admissions	Total admissions
3	The Pirates! Band of Misfits	GB INC / US	2012	Jeff Newitt, Peter Lord	6 837 855	12 825 654
4	Sammy's Adventures: The Secret Passage	BE / US	2010	Ben Stassen	5 934 815	8 397 022
16	Minuscule - La vallée des fourmis perdues	FR / BE	2013	Thomas Szabo, Hélène Giraud	2 463 212	3 474 216
19	Planet 51	ES / GB	2009	Javier Abad, Jorge Blanco	2 317 141	2 860 438
39	**The Illusionist**	**GB / FR**	**2009**	**Sylvain Chomet**	**673 855**	**1 027 280**
44	A Cat in Paris	FR / NL / CH / BE	2010	Jean-Loup Felicioli, Alain Gagnol	593 580	644 405
45	Jack and the Cuckoo-Clock Heart	FR / BE	2013	Stéphane Berla, Mathias Malzieu, Stéphane Berla	583 540	583 540
46	The Rabbi's Cat	FR / AT	2011	Antoine Delesvaux, Joann 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**	**Fernando Trueba, Javier Mariscal**	**360 693**	**421 590**
90	**Alois Nebel**	**CZ / DE**	**2011**	**Tomás Lunák**	**160 692**	**160 692**
	The Congress	**IL / BE / DE / LU / FR / PL**	**2013**	**Ari Folman**	**125 962**	**143 657**
138	Wrinkles	ES	2011	Ignacio Ferreras	55 012	55 359
151	**The Art of Happiness**	**IT**	**2013**	**Alessandro Rak**	**41 737**	**41 737**
253	Jasmine	FR	2013	Alain Ughetto	3 874	3 874

EUROPEAN FILM ACADEMY, OBS LUMIERE

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.

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

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 Ants	FR / BE	2013	Thomas Szabo, Hélène Giraud	2 463 212	3 474 216
21	Zarafa	FR / BE	2012	Jean-Christophe Lie, Rémi 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	Jean-Loup Felicioli, Alain Gagnol	593 580	644 405
45	Jack and the Cuckoo-Clock Heart	FR / BE	2013	Stéphane Berla, Mathias Malzieu, Stéphane Berla	583 540	583 540
46	**The Rabbi's Cat**	**FR / AT**	**2011**	**Antoine Delesvaux, Joann 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	Fernando Trueba, Javier 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	Kresten Vestbjerg Andersen, Thorbjørn Christoffersen	233 948	233 948
84	The Painting	FR / BE	2011	Jean-François Laguionie	202 273	207 047
119	My Mommy is in America and she met Buffalo Bill	FR / LU	2012	Thibaut Chatel, Marc Boreal	74 502	74 502
123	Approved for Adoption	BE / FR / KR / CH	2012	Henin Jung, Laurent 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	**Crulic: The Path to Beyond**	**RO / PL**	**2011**	**Anca Damian**	**7 414**	**7 414**

ANNECY FESTIVAL, OBS LUMIERE

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.

143 European animation films nominated to the Oscar for Best Animated Picture ● 2010-2014

Rank	Film	Country of origin	Production year	Director	EUR admissions	Total admissions
3	The Pirates! Band of Misfits	GB INC / US	2012	Jeff 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	Stéphane Aubier, Vincent Patar	611 655	668 418
44	A Cat in Paris	FR / NL / CH / BE	2010	Jean-Loup Felicioli, Alain Gagnol	593 580	644 405
58	Chico & Rita	ES / GB	2010	Fernando Trueba, Javier Mariscal	360 693	421 590
92	Song of the Sea	IE / DK / BE / LU / FR	2014	Tomm Moore	152 394	159 434

AMPAS, OBS LUMIERE

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

144 Top 20 European animation films in the Europa Cinemas Network ● 2010-2014

Rank	Film	Country	Year	Director	Local admissions	EUR Admissions
1	The Illusionist	GB / FR	2009	Sylvain Chomet	103 563	317 345
2	Ernest & Celestine	FR / BE / LU	2012	Stéphane Aubier, Vincent Patar	169 793	312 459
3	A Cat in Paris	FR / NL / CH / BE	2010	Jean-Loup Felicioli, Alain Gagnol	224 559	297 712
4	Sammy's avonturen: De geheime doorgang	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	Jean-François Laguionie	139 893	168 076
7	Chico & Rita	ES / GB	2010	Fernando Trueba, Javier Mariscal	46 116	167 005
8	Minuscule - La vallée des fourmis perdues	FR / BE	2013	Thomas Szabo, Hélène 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	Antoine Delesvaux, Joann 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	Jean-Christophe Dessaint	92 599	108 810
13	The House of Magic	BE	2013	Ben Stassen, Jeremy Degruson	4 410	106 515
14	Kirikou et les hommes et les femmes	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	Jean-Christophe Lie, Rémi Bezançon	63 058	95 556
17	Tad, the Lost Explorer	ES	2012	Enrique Gato	34 943	85 878
18	Niko 2 - Lentäjäveljekset	FI / DE / DK / IE	2012	Jørgen Lerdam, Kari Juusonen	79	83 923
19	The Gruffalo's Child	GB/DE	2011	Uwe Heidschötter, Johannes Weiland	3 947	83 779
20	Loulou - L'incroyable secret	FR / BE / HU	2013	Eric Omond	75 537	81 627

EUROPA CINEMAS, OBS LUMIERE

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

European programme awards

145 TV awards for European productions at the Annecy International Animated Film Festival ● 201-2014

By year of award

Title	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 Demuynck	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	Pierre-Luc 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	Johannes 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	Johannes Weiland, Klaus Morschheuser	Award for best TV special
Der Kleine und das Biest	DE	2010	Johannes Weiland, Uwe Heidschötter	Cristal TV Production
Dragons et Princesses "Le garçon qui ne mentait jamais"	FR	2010	Michel Ocelot	Special Award TV series
The Gruffalo	GB/ DE	2010	Jakob Schuh, Max Lang	Award for best TV special

ANNECY FESTIVAL, MIFA http://www.annecy.org

146 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 Barry	UK	2010	Neville Astley, Mark Baker	Best Pre School series

BRITISH ANIMATION AWARDS, http://www.britishanimationawards.com

147 Cartoons on the Bay Pulcinella Awards ● 2010-2014

By year of award

Title	Country of origin	Award year	Director	Award
Patchwork Pals	DE	2014	Angela Steffen, Andrea 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	Anne-Lise Koehler, Éric Serre	Pulcinella Award Best TV Pilot
The Amazing World of Gumball	UK/IE/US	2012	Mic Graves, Ben 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	Uwe Heidschötter, Johannes 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.cartoonsonthebay.com

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Ministry of Culture	CZ	www.mkcr.cz
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