OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
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EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE

Audiovisual Media for Children in Europe:

The Theatrical Circulation of European Children's Films; Television for Children

Contient une synthèse en français

Enthält eine Executive Summary auf Deutsch

Report prepared by the
European Audiovisual Observatory
for the
CINEKID for Professionals Conference
at the
25th CINEKID Festival

Amsterdam, 18 & 19 October 2011

Martin Kanzler
Susan Newman-Baudais
European Audiovisual Observatory

25 -JAAR- CINEKID FESTIVAL

CINEKID PROFESSIONAL

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Audiovisual Media for Children in Europe: the Theatrical Circulation of European Children's Films; Television for Children

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Foreword

CINEKID, the festival for children's media, is 25 years old. This report represents the contribution of the European Audiovisual Observatory to the anniversary edition of the festival, which takes place in Amsterdam from 12 to 21 October 2011. The report will be presented during the CINEKID for Professionals Conference on 18 October 2011.

The European Audiovisual Observatory is a European public service body comprised of 37 member states and the European Union, represented by the European Commission. It operates within the legal framework of the Council of Europe and works alongside a number of partner and professional organisations from within the industry and with a network of correspondents. The mission of the Observatory is to gather and distribute information on the audiovisual industry in Europe. In addition to contributions to conferences, other major activities are the publication of a Yearbook, newsletters and reports, the compilation and management of databases and the provision of information through the Observatory's Internet site (http://www.obs.coe.int).

This report is divided into two different parts, each looking at different aspects of children's use of audiovisual media. The first part focuses on the theatrical market for children's films in Europe. Using an extensive data sample, it examines the production of live action and animation films for children, their circulation among European countries and how these films perform on theatrical markets across Europe.

The second part looks at two aspects of television for children in Europe. The first aspect studied is the supply of channels for younger viewers and the evolution in the availability of channels since 1990. This section then looks at the programming of animation – generally aimed at younger viewers – on a selection of 137 channels available in Europe, and analyses the relative importance of European animation in the programming mix.

We would like to thank our colleagues at CARTOON (Yolanda Alonso and Annick Maes), at the European Children's Film Association, and at KIDS Regio (Viola Gabrielli) for their assistance in preparing the sample of children's films studied in this report.

While the report cannot claim to be a comprehensive overview of either the market for children's films or of the European children's television landscape, it does provide some interesting insights into two specific areas. We hope it will provide a factual basis to at least some of the discussions taking place during the CINEKID Professional Conference…. and, of course, we wish CINEKID a very happy birthday!

Martin Kanzler & Susan Newman-Baudais
Analysts – Film Industry
European Audiovisual Observatory

Strasbourg, October 2011

ENGLISH

Executive Summary: Audiovisual Media for Children in Europe

The theatrical circulation of European children's films

In the first part of this report the European Audiovisual Observatory analyses the origin, circulation and performance of a sample of European live action and animated films for children on European theatrical markets. Circulation is measured in terms of the average number of release markets for these films as well as in terms of the percentage of films that get released on at least one non-national market. Performance is measured by studying the average admissions for the sample films as a whole as well as their admissions on national and non-national markets.

The data sample comprises a total of 564 European live action and animated feature films for children produced and released in cinemas in Europe during the period 2001 to 2010. Admissions figures and release patterns for these films are analysed using data drawn from the Observatory's LUMIERE database on admissions to films in Europe[1]. Comparative data for European fiction films (other than children's films), also drawn from LUMIERE, has been used to provide some additional comparisons.

The following key observations can be made on the basis of analysis of the sample:

1. The Big 5[2] European markets and the Scandinavian countries were the largest producers of children's films, accounting for about 44% and 30% respectively of the total sample production volume. With 91 films, Germany was the most prolific producer during the reference period, followed by France and Denmark.
2. 78% of the sample films were released in two or more European markets and the children's films studied were, on average, released in a total of 3.9 territories during the reference period. Films from the Big 5 territories obtained release in more countries than films from other regions in Europe.
3. Overall, children's animation films were released in more markets than live action films. However, live action films from the Big 5 territories and from Central and Eastern Europe were released in more markets than animation films of the same origin.
4. The median number of admissions to a European children's film was 116 451. For a live action film for children the median was 130 525 tickets sold. For animation features, the median admission level was 92 172 tickets. Films of both types originating from the Big 5 territories obtained above average admissions results. Fiction films had median admissions of 38 886 tickets sold, approximately one third the median result for a children's film.
5. Two-thirds (66%) of admissions to European children's films (animation and live action) were generated on national markets. Animation films were, however, less dependent on national

[1] http://lumiere.obs.coe.int
[2] France, Germany, Italy, Spain and the United Kingdom

markets than their live action counterparts, generating 44% of total admissions outside their national markets, compared to 29% of admissions for live action films.

6. Scandinavian and Western European animation films were the least dependent on their national markets, whereas as live action films from Scandinavia and Central and Eastern European countries relied principally on the domestic market for their success.

TV channels for children: the European landscape

The supply of television channels for children in Europe has followed the general trend towards a multiplication of television services, accessible via a variety of platforms.

In December 2010, using the MAVISE database[3], established by the European Audiovisual Observatory for the Directorate General of Communication of the European Commission, a total of 275 children's channels were identified as being available in Europe. This compares to an estimated 64 channels available in the year 2000.

The Flemish-speaking Community of Belgium, Poland and France had the largest offer of channels available for younger viewers, more than 30 as of December 2010 in each case. In terms of the country of establishment of channels, the leading territory was the United Kingdom, where a total of 136 children's channels are legally established. This figure includes multiple linguistic versions of pan-European children's channels such as Nickelodeon and the Disney channels.

Most of the larger European countries have national children's channels. These channels are generally private, but notable public examples include Ketnet and La Trois in Belgium, Ramasjang in Denmark, Gulli (public-private joint venture) in France, KIKA in Germany, 101 TV and Zappelin 4 in the Netherlands, Clan TVE in Spain and RAI Gulp and Yoyo in Italy. The only truly pan-European channels are privately and, generally, US-owned via European-registered subsidiaries.

Animation on European TV

Animation represents a relatively small segment of the total fiction of all origins broadcast on the major Western European television channels covered in the study sample. Its share of the total hourly volume of fiction broadcast is 15%, way behind that of series and soaps (43%) and feature films (37%).

Almost half (44%) of the animation broadcast on the major Western European channels covered is of European origin. Animation produced in the broadcasting country accounts for 15% of the total volume of European animation broadcast, while animation imported from other European countries

[3] Available free-of-charge at http://mavise.obs.coe.int/

accounts for a further 10%. European co-productions are particularly important in this context, accounting for 19% of the overall European animation total. Switzerland, the Netherlands, France and Spain devoted the highest proportion their total animation broadcasts to European production.

FRANÇAIS

Synthèse : Les médias audiovisuels pour enfants en Europe

La circulation en salles des films européens pour enfants

Dans la première partie de ce rapport, l'Observatoire européen de l'audiovisuel analyse l'origine, la circulation et la performance d'un échantillon de films de fiction et d'animation pour enfants sur le marché européen du cinéma. La circulation est mesurée en termes de nombre moyen de marchés de diffusion de ces films et en termes de pourcentage de films diffusés sur au moins un marché non-national. La performance en est mesurée sur la base de la moyenne des entrées pour les films de l'échantillon pris dans son ensemble, ainsi que du nombre d'entrées sur les marchés nationaux et non-nationaux.
L'échantillon analysé comprend un total de 564 longs métrages de fiction et d'animation européens pour enfants, produits et diffusés dans les cinémas d'Europe sur la période 2001 à 2010. Les chiffres des entrées et les tendances de diffusion de ces films sont analysés à l'aide des données issues de la base LUMIERE de l'Observatoire sur les entrées des films en Europe[4]. Des données comparatives pour les films de fiction européens (autres que les films pour enfants), également issues de LUMIERE, ont été utilisées pour fournir quelques comparaisons supplémentaires.

Voici les principales observations qui peuvent être faites à partir de l'analyse de cet échantillon :

1. Les 5 grands marchés européens[5] et les pays scandinaves sont les plus gros producteurs de films pour enfants, avec respectivement 44 % et 30 % environ du volume de production total de l'échantillon. L'Allemagne est le pays producteur le plus prolifique avec 91 films sur la période de référence, suivi par la France et le Danemark.

2. 78 % des films de l'échantillon ont été diffusés sur au moins deux marchés européens et les films pour enfants étudiés ont été, en moyenne, diffusés sur un total de 3,9 territoires pendant la période de référence. Les films des 5 grands territoires ont pu être diffusés dans plus de pays que les films provenant d'autres régions d'Europe.

3. Globalement, les films d'animation pour enfants ont été diffusés sur davantage de marchés que les films de fiction pour enfants. Cependant, les films de fiction pour enfants des 5 grands territoires et des pays d'Europe centrale et orientale ont été diffusés sur un plus grand nombre de marchés que les films d'animation de même origine.

4. Le nombre médian des entrées d'un film européen pour enfants était de 116 451. Pour un film de fiction pour enfants, la valeur médiane était de 130 525 entrées. Pour les longs métrages

[4] http://lumiere.obs.coe.int
[5] France, Allemagne, Italie, Espagne et Royaume-Uni.

d'animation, la valeur médiane des entrées était de 92 172. Les films de ces deux catégories provenant des 5 grands territoires ont obtenu des résultats supérieurs à la moyenne des entrées. Les films de fiction européens autres que les films pour enfants ont réalisé une valeur médiane des entrées de 38 886, soit environ un tiers du résultat médian pour un film pour enfants.

5. Deux tiers (66 %) des entrées des films européens pour enfants (animation et fiction) ont été produits sur les marchés nationaux. Néanmoins, les films d'animation se sont avérés moins dépendants des marchés nationaux que les films de fiction, générant 44 % du total des entrées en-dehors de leurs marchés nationaux, comparativement à 29 % des entrées pour des films de fiction pour enfants.

6. Les films d'animation scandinaves et d'Europe occidentale sont les moins tributaires des marchés nationaux, tandis que le succès des films de fiction pour enfants des pays de Scandinavie et d'Europe centrale et orientale s'appuie essentiellement sur les marchés nationaux.

Chaînes de télévision pour enfants : le paysage européen

L'offre de chaînes de télévision pour enfants en Europe a suivi la tendance générale vers une multiplication des services de télévision, accessibles via des plateformes variées.

En décembre 2010, la base de données MAVISE[6,] mise en place par l'Observatoire européen de l'audiovisuel pour la Direction Générale de la Communication de la Commission européenne, recensait au total 275 chaînes pour enfants disponibles en Europe, alors qu'en 2000 on estimait ce chiffre à 64.

La Communauté flamande de Belgique, la Pologne et la France affichaient le plus grand nombre de chaînes disponibles pour les jeunes téléspectateurs, soit pour chacune de ces entités plus de 30 chaînes en décembre 2010. En termes de pays d'établissement des chaînes, le Royaume-Uni arrive en tête avec un total de 136 chaînes pour enfants légalement implantées. Ce chiffre inclut des versions multilingues de chaînes pan-européennes pour enfants telles que Nickelodeon et les chaînes Disney.

La plupart des grands pays européens ont des chaînes nationales pour enfants. Ces chaînes sont généralement privées, mais il existe également des exemples notoires de chaînes publiques telles que Ketnet et La Trois en Belgique, Ramasjang au Danemark, Gulli (partenariat public-privé) en France, KIKA en Allemagne, 101 TV et Zappelin 4 aux Pays-Bas, Clan TVE en Espagne, ainsi que

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[6] Disponible gratuitement sur http://mavise.obs.coe.int/

RAI Gulp et Yoyo en Italie. Les seules chaînes véritablement pan-européennes sont privées et généralement détenues par des sociétés américaines via des filiales enregistrées en Europe.

L'animation à la télévision européenne

L'animation représente un segment relativement réduit de la fiction globale de toutes origines diffusée sur les principales chaînes de télévision d'Europe occidentale couvertes par l'échantillon. Elle correspond à 15 % du volume horaire total de fiction diffusée, loin derrière les séries et feuilletons « soap » (43 %) et les longs métrages (37 %).

Près de la moitié (44 %) de l'animation diffusée sur les principales chaînes d'Europe occidentale couvertes par cette étude est d'origine européenne. Les œuvres d'animation produites dans le pays de diffusion représentent 15 % du volume total de l'animation diffusée en Europe, tandis que l'animation importée à partir d'autres pays européens représente 10 % supplémentaires. Les coproductions européennes sont particulièrement importantes dans ce contexte et représentent 19 % de l'ensemble de l'animation diffusée.

La Suisse, les Pays-Bas, la France et l'Espagne ont consacré la plus grande part du volume total de leurs animations diffusées à la production européenne.

DEUTSCH

Executive Summary: audiovisuelle Medien für Kinder in Europa

Die Verbreitung europäischer Kinderfilme im Kino

In der ersten Hälfte dieses Berichts befasst sich die Europäische Audiovisuelle Informationsstelle mit dem Ursprung, der Verbreitung und dem Erfolg einer Auswahl von Real- und Animationsfilmen für Kinder auf dem europäischen Kinomarkt. Für die Messung der Verbreitung wird zum einen die durchschnittliche Anzahl von Märkten, in denen ein Film in die Kinos kommt, und zum anderen der Prozentsatz der Filme herangezogen, die in mindestens einem ausländischen Markt gezeigt werden. Der Erfolg wird anhand der durchschnittlichen Kinobesucherzahlen für die untersuchten Filme insgesamt sowie der Besucherzahlen im In- und Ausland berechnet.

Die untersuchte Stichprobe umfasst 564 europäische Real- und Animationsfilmen für Kinder, die zwischen 2001 und 2010 produziert und in europäischen Kinos gezeigt wurden. Die Besucherzahlen und Veröffentlichungsmuster für diese Filme werden auf der Basis der Datenbank LUMIERE der Informationsstelle über die Kinobesucherzahlen in Europa ausgewertet[7]. Zudem wurden ebenfalls aus der LUNIERE-Datenbank vergleichende Daten zu europäischen Fiktionsfilmen (nicht für Kinder) ausgewertet, um weitere Vergleiche zu ermöglichen.
Aus der Untersuchung der Stichprobe lassen sich im Wesentlichen folgende Erkenntnisse ableiten:

1. Größte Produzenten von Kinderfilmen sind die fünf großen europäischen Märkte[8] und die skandinavischen Länder mit rund 44% bzw. 30% des Gesamtvolumens der Stichprobe. Mit 91 Filmen war Deutschland der größte Produzent im Vergleichszeitraum, gefolgt von Frankreich und Dänemark.

2. 78% der untersuchten Kinderfilme wurden in zwei oder mehr Ländern Europas herausgegeben. Der Durchschnitt über alle untersuchten Filme im Vergleichszeitraum liegt bei 3,9 Länder pro Film. Die Filme aus den fünf großen Märkten wurden in mehr Ländern gezeigt als Filme aus anderen Regionen Europas.

3. Insgesamt betrachtet, wurden Kinderanimationsfilme in mehr Ländern herausgegeben als Realfilme. Allerdings wurden Realfilme aus den fünf großen Märkten sowie aus Mittel- und Osteuropa in mehr Ländern herausgegeben als Animationsfilme gleichen Ursprungs.

4. Im Schnitt erreicht ein europäischer Kinderfilm 116.451 Zuschauer. Bei Realfilmen für Kinder liegt der Medianwert bei 130.525 verkauften Kinokarten, gegenüber 92.172 bei Animationsfilmen. Sowohl Realfilme als auch Animationsfilme aus den fünf großen

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7 http://lumiere.obs.coe.int
8 Frankreich, Deutschland, Italien, Spanien und das Vereinigte Königreich

westeuropäischen Märkten erzielten überdurchschnittliche Besucherzahlen. Bei Fiktionsfilmen beträgt der Median der Besucherzahlen mit 38.886 verkauften Kinokarten nur rund ein Drittel des Werts bei Kinderfilmen.

5. Europäische Kinderfilme (Animations- und Realfilme) erreichen rund zwei Drittel (66 %) ihrer Zuschauer auf dem jeweiligen nationalen Markt. Allerdings hängen Animationsfilme mit 44 % der Besucher im Ausland weniger stark vom nationalen Markt ab als Realfilme (29 %).

6. Skandinavische und westeuropäische Animationsfilme sind am wenigsten auf den nationalen Markt angewiesen, wohingegen Realfilme aus Skandinavien und Mittel- und Osteuropa vor allem bei einheimischen Zuschauern Erfolg haben.

Fernsehen für Kinder: die europäische Landschaft

Das Angebot an Fernsehsendern für Kinder in Europa folgt dem allgemeinen Trend hin zu einem ständig wachsenden Angebot an Fernsehdiensten über unterschiedlichste Plattformen.

Laut MAVISE-Datenbank[9], die von der Europäischen Audiovisuellen Informationsstelle im Auftrag der Generaldirektion Kommunikation der Europäischen Kommission entwickelt wurde, gab es im Dezember 2010 in Europa insgesamt 275 Kinderkanäle, gegenüber geschätzten 64 im Jahr 2000.

Das größte Fernsehangebot für jüngere Zuschauer gibt es mit jeweils über 30 verfügbaren Sendern in der Flämischen Gemeinschaft Belgiens, Polen und Frankreich (Stand Dezember 2010). Was den Sitz der Sender betrifft, so steht das Vereinigte Königreich mit insgesamt 136 rechtmäßig niedergelassenen Kindersendern an der Spitze. Darin enthalten sind diverse Sprachversionen von paneuropäischen Kindersendern wie Nickelodeon oder die Disney-Kanäle.

In den meisten größeren Ländern Europas gibt es nationale Kinderkanäle. Dabei handelt es sich in der Regel um Privatsender, aber es gibt auch einige öffentlich-rechtliche Sender, darunter Ketnet und La Trois in Belgien, Ramasjang in Dänemark, Gulli (öffentlich-privates Joint Venture) in Frankreich, KIKA in Deutschland, 101 TV und Zappelin 4 in den Niederlanden, Clan TVE in Spanien sowie RAI Gulp und Yoyo in Italien. Die einzigen wirklich paneuropäischen Kanäle sind in aller Regel US-amerikanische Privatsender bzw. ihre europäischen Tochtergesellschaften.

Animation im europäischen Fernsehen

Animationsfilme machen nur einen vergleichsweise geringen Teil der Fiktion aus, die im Vergleichszeitraum von den hier ausgewerteten großen westeuropäischen Fernsehsendern

[9] Frei zugänglich unter http://mavise.obs.coe.int/

ausgestrahlt wurde. So beträgt der Anteil der Animationsfilme an der Gesamtsendezeit für Fiktion nur 15 %, weit hinter Serien und Soaps (43 %) und Spielfilmen (37 %).

Fast die Hälfte (44 %) der von den großen westeuropäischen Sendern ausgestrahlten Animation ist europäischen Ursprungs. Im Land des Senders produzierte Animationsfilme machen 15 % des Gesamtvolumens der im europäischen Fernsehen ausgestrahlten Animation aus, weitere 10 % entfallen auf Importe aus anderen europäischen Ländern. Besonders wichtig in diesem Zusammenhang sind europäische Koproduktionen, die 19 % der europäischen Animation ausmachen.

Die Schweiz, die Niederlande, Frankreich und Spanien verzeichnen den höchsten Anteil an europäischen Produktionen am Gesamtvolumen der im Fernsehen ausgestrahlten Animation.

Part 1:
The theatrical circulation of European children's films

Introduction: objectives of the analysis

The objective of this study is to analyse the theatrical circulation and performance of a sample of European live action and animation films for children. Though the sample aims for extensive coverage of the children's films produced in Europe between 2001 and 2010, the comprehensiveness of the data cannot be guaranteed. Please refer to the following section for a description of the data sample underlying the analysis and to Appendix 1 on page 43 for definitions and information on the methodological approach applied.

The analysis focuses on the following four key questions:

1. Which regions in Europe are particularly active in producing children's films? Are there any differences between regions in terms of preferences for live action or animation production?

2. How do European children's films travel, i.e. on how many markets do they get released on average? What percentage of films gets a non-national release? Can any differences between the career of a children's animation film and a children's live action film be identified?

3. How do European children's films perform, i.e. how many admissions do they generate on average? Do animation or live action films perform best?

4. What role do non-national markets play for European children's films, i.e. what is the share of non-national admissions to total admissions for these films? Are there noticeable differences between live action and animation films in this regard?

The data sample

The children's film data sample used in this report has been created in two different ways. For children's live action films, an initial sample was drawn up in 2009 using lists supplied by the European Children's Film Association (ECFA)[10] and supplemented with lists of films presented at relevant festivals by the KIDS Regio sub-group of Cine-Regio[11], the European network of regional film funds. This list was updated by ECFA / KIDS Regio in 2011 and further identification of films was carried out by the Observatory. For animation films, existing data in the Observatory's LUMIERE database was supplemented with the assistance of CARTOON[12], who provided lists of the completed animation titles presented at CARTOON Movie since 1999. A number of animation films, clearly intended for young adults or adults, were excluded from the sample. In relation to animation features, it should be noted that the LUMIERE database cannot claim to be comprehensive in its recognition of this genre of film.

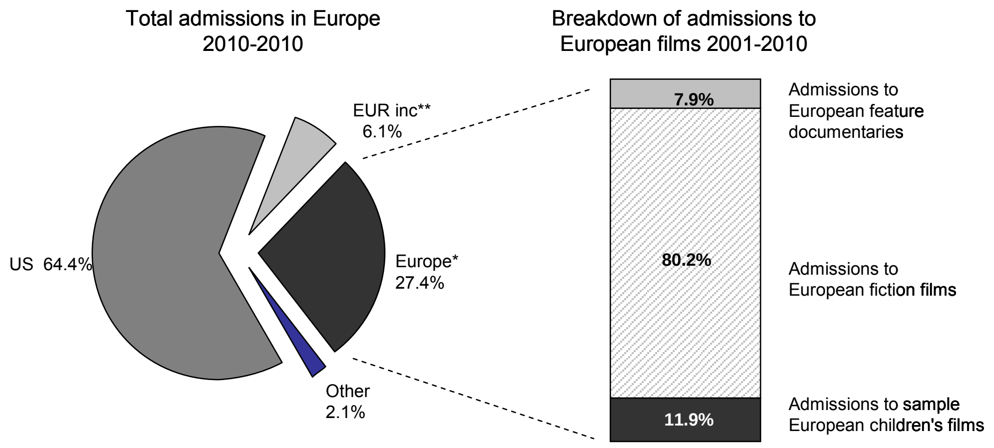
The sample used in this report comprises a total of 564 European children's films with cumulative admissions of 311.5 million tickets sold between 2001 and 2010. 227 of these films are animation features, with total admissions of just over 100 million and 337 of these are live action works, with a total of 211 million tickets sold over the period 2001 to 2010.

Figure 1 puts the data sample into the overall perspective of admissions to films in Europe between 2001 and 2010. During this period 64.4% approximately of total admissions were to US films. A

[10] http://www.ecfaweb.org/
[11] http://www.cine-regio.org/
[12] http://www.cartoon-media.be/

further 6.1% of admissions were to films produced in Europe using US finance (shown as *EUR inc* here), and films from the rest of world accounted for 2.1% of total tickets sold. All these types of films are excluded from the data sample. The remaining admissions, 27.4%, were to European films. The data sample studied here is a sub-set of this group.

Figure 1: Data sample in relation to the total market volume in terms of admissions 2001 - 2010



* Europe refers to films produced in the 37 member states of the European Audiovisual Observatory for which data on markets are collected.
** EUR inc refers to films produced in Europe with incoming investment from the US, e.g. *Harry Potter*

Source: European Audiovisual Observatory

The European Audiovisual Observatory estimates that the European children's film data sample used for this report represents about 3.2% of total admissions to films of all origins over the period and just under 12% of all admissions generated by European films between 2001 and 2010.

Production of European children's films

Within the given sample, Germany, with 91 films, was the most prolific producer of children's films in the period studied. France took second place with 66 films, followed by the Denmark (58), Sweden (54), Spain (45) and the Netherlands (39). Smaller Western European and Central and Eastern European countries produced significantly smaller numbers of films specifically for children, but this is of course within the context of a lower general level of production, given the smaller market sizes.

Table 1: Live action children's films by country of origin 2001 - 2010

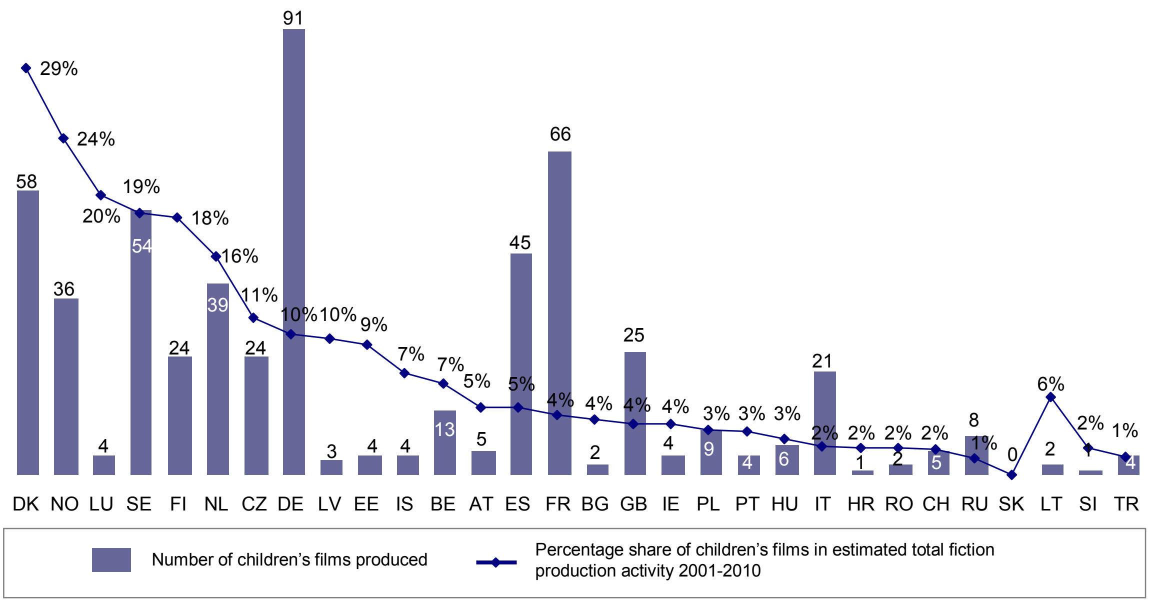
#	ISO code	Country of origin	Region	Number of children's animation films produced	Number of children's live action films produced	Total number of children's films produced between 2001 and 2010
1	DE	Germany	Big 5	33	58	91
2	FR	France	Big 5	42	24	66
3	DK	Denmark	Scandinavia	12	46	58
4	SE	Sweden	Scandinavia	29	25	54
5	ES	Spain	Big 5	38	7	45
6	NL	The Netherlands	Western Europe	2	37	39
7	NO	Norway	Scandinavia	7	29	36
8	GB	United Kingdom	Big 5	5	20	25
9	CZ	Czech Republic	Central / Eastern Europe	10	14	24
10	FI	Finland	Scandinavia	7	17	24
11	IT	Italy	Big 5	8	13	21
12	BE	Belgium	Western Europe	4	9	13
13	PL	Poland	Central / Eastern Europe	5	4	9
14	RU	Russian Federation	Central / Eastern Europe	6	2	8
15	HU	Hungary	Central / Eastern Europe	1	5	6
16	AT	Austria	Western Europe		5	5
17	CH	Switzerland	Western Europe	1	4	5
18	EE	Estonia	Central / Eastern Europe	2	2	4
19	IE	Ireland	Western Europe		4	4
20	IS	Iceland	Western Europe	1	3	4
21	LU	Luxembourg	Western Europe	3	1	4
22	PT	Portugal	Western Europe	2	2	4
23	TR	Turkey	Central / Eastern Europe	4		4
24	LV	Latvia	Central / Eastern Europe	1	2	3
25	BG	Bulgaria	Central / Eastern Europe	1	1	2
26	LT	Lithuania	Central / Eastern Europe	2		2
27	RO	Romania	Central / Eastern Europe	1	1	2
28	HR	Croatia	Central / Eastern Europe		1	1
29	SI	Slovenia	Central / Eastern Europe		1	1
	TOTAL			227	337	564

Source: European Audiovisual Observatory

Table 1 illustrates quite clearly the different national trends in terms of the types of production. Countries such as France, Spain and the Russian Federation show a preference for animation production, while the live action genre is preferred in Germany, Denmark, the Netherlands, Italy and the United Kingdom. Sweden, Estonia, Poland and Portugal show approximately equal production levels in the two genres.

Another way to analyse the relative importance of live action children's films in a specific country is to relate the number of live action children's films produced to the estimated total production volume of feature fiction films in the reference period. This ensures more balanced treatment of countries with small overall production volumes. Measured as a percentage of total fiction film production, the data indicates that Denmark, Norway and Luxembourg dedicate the highest share of their total production activity to producing children's films (both animation and live action), which account for 29% of total production in Denmark, 24% in Norway and 20% in Luxembourg. Live action children's films also account for a significant share (between 19% and 10%) in Sweden, Finland, the Netherlands, the Czech Republic, Germany and Latvia.

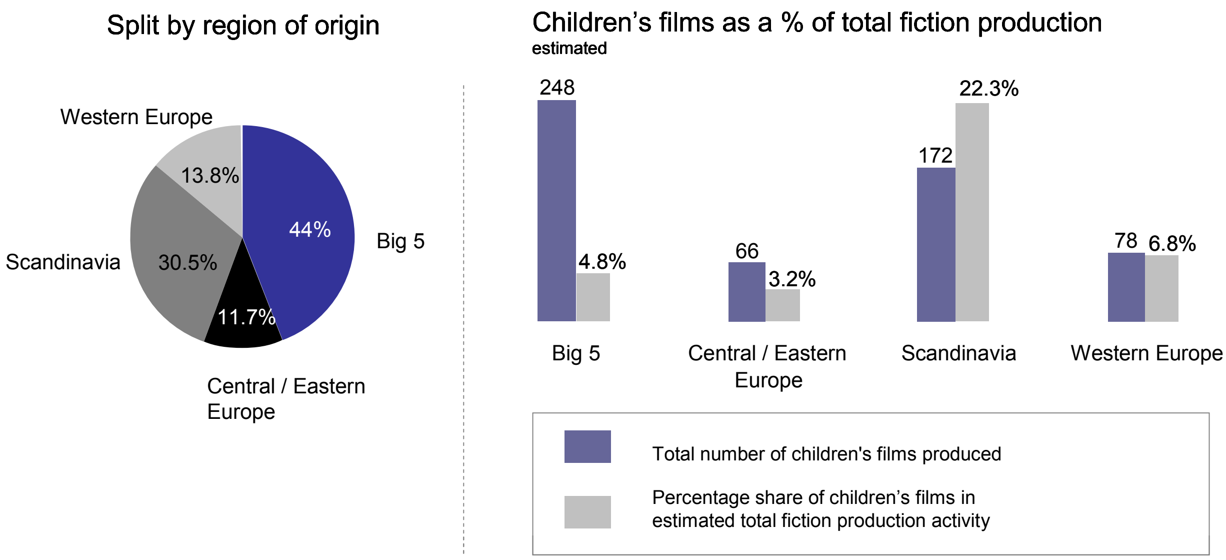
Figure 2: Live action children's films' share of total fiction feature production 2001 - 2010



Source: European Audiovisual Observatory

Looking at the production activity of live action children's films from a regional perspective, the data suggests that the big 5 countries produce about 44% of all children's films and that Scandinavia produces about 30%. Western Europe accounts for about 14% and Central / Eastern Europe for 12%. Taking into consideration the total estimated fiction production activity in these regions, Figure 3 shows clearly that children's films account for a much larger share of total production volume in the Scandinavian regions, accounting for 22% of total fiction production, compared to just 5% of total production volume in the big five markets.

Figure 3: Children's film production by region and as % of total fiction production 2001 - 2010



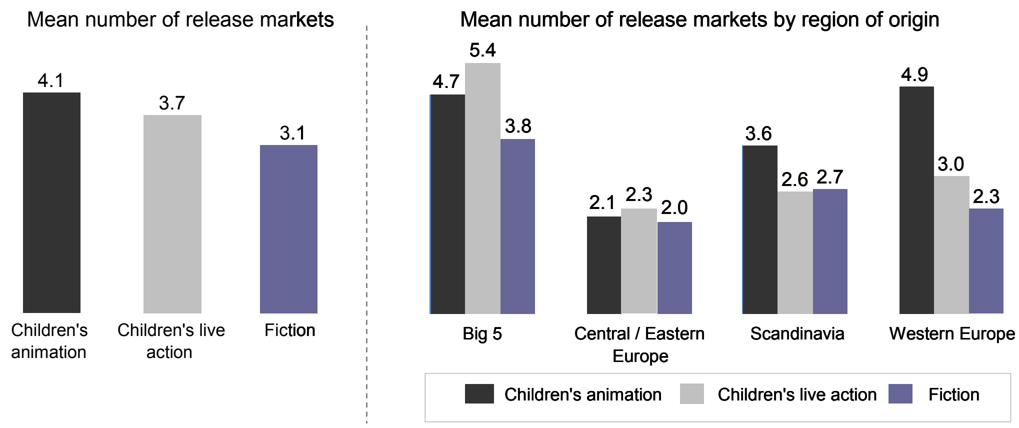
Source: European Audiovisual Observatory

Theatrical circulation of European children's films

Theatrical circulation in the context of this chapter is measured by the average number (mean) of markets on which the different types of films are released. The propensity of a film to obtain a non-national release, that is the percentage of films in each category that get released in at least one market other than the domestic market, will be analysed in section 9 on the role of non-national markets for European live action children's films.

Analysis of the data sample shows that the average number of release markets for a European children's film is 3.9 markets (that is a release on the domestic market plus a further 2.9 territories). Figure 4 shows the averages for each type of film. On average European children's animation films are released in a total of 4.1 European territories, that is on the domestic market as well as in 3.1 further European markets. Children's live action films show a slightly lower figure: on average they are released on 3.7 markets, that is, on the film's domestic market and in 2.7 other European territories. Both of these types of film circulate better than European fiction films, which are released, on average, in a total of 3.1 European markets.

Figure 4: Mean number of release markets by film type and region 2001 - 2010

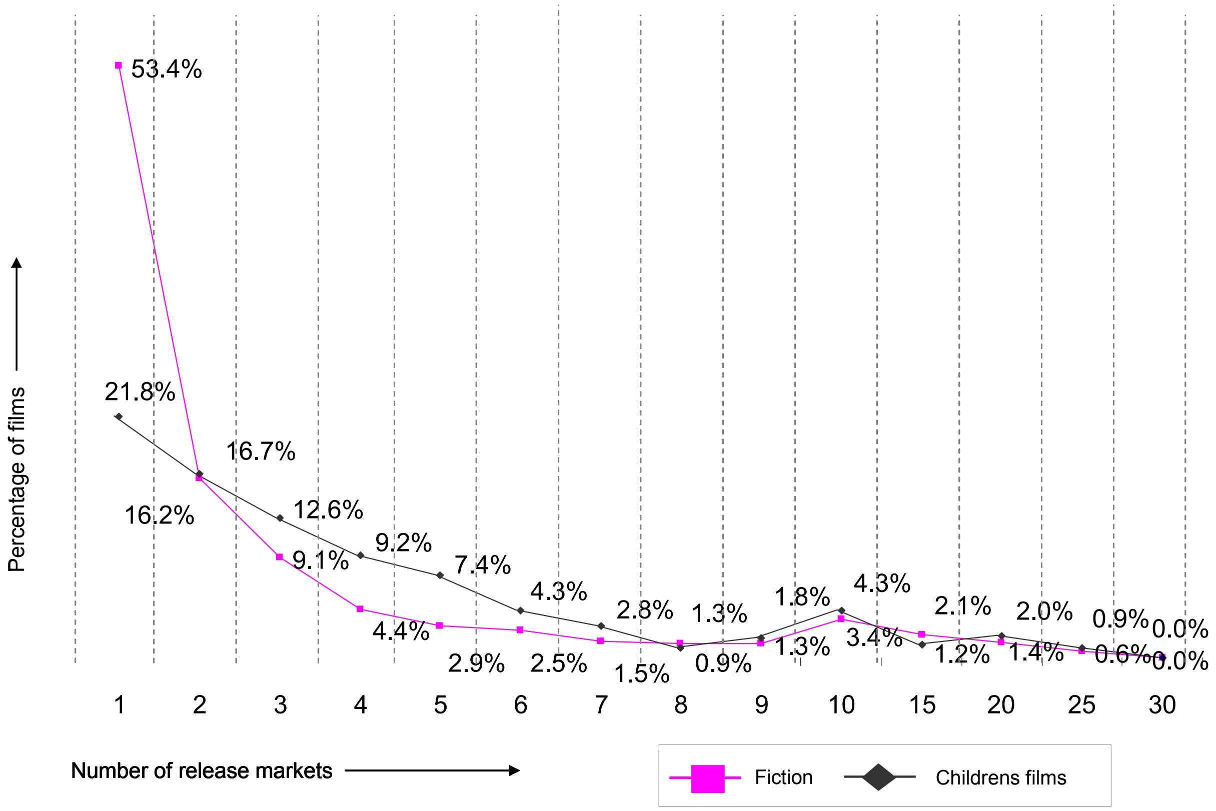


Source: European Audiovisual Observatory

Comparing films from the different regions, the sample data shows that live action children's films originating in one of the Big 5 countries get released in more countries than films from other regions in Europe. Live action films from the Big 5 get released on average on 5.4 markets compared to 3.0 release markets for Western European and 2.6 release markets for Scandinavian films. Children's animation films show a different pattern. Here the films which circulate most successfully come from Western European countries, with an average of 4.9 European release markets for these films, just ahead of films from the Big 5, which are released in 4.7 territories on average. Both Western European and Scandinavian children's animation circulates better that children's live action films from the same regions.

Analysis of the distribution pattern shown in Figure 5 reveals that 21.8% of children's films in the sample were released on just one market. That means that 78.2% of all sample films were released on two or more markets. About 16.7% of the sample films were released on two markets, 12.6% on three and just over 9% on four markets. 4.3% of the sample films were released in 10 European territories.

Figure 5: Percentage of European live action children's films by number of release markets



Source: European Audiovisual Observatory

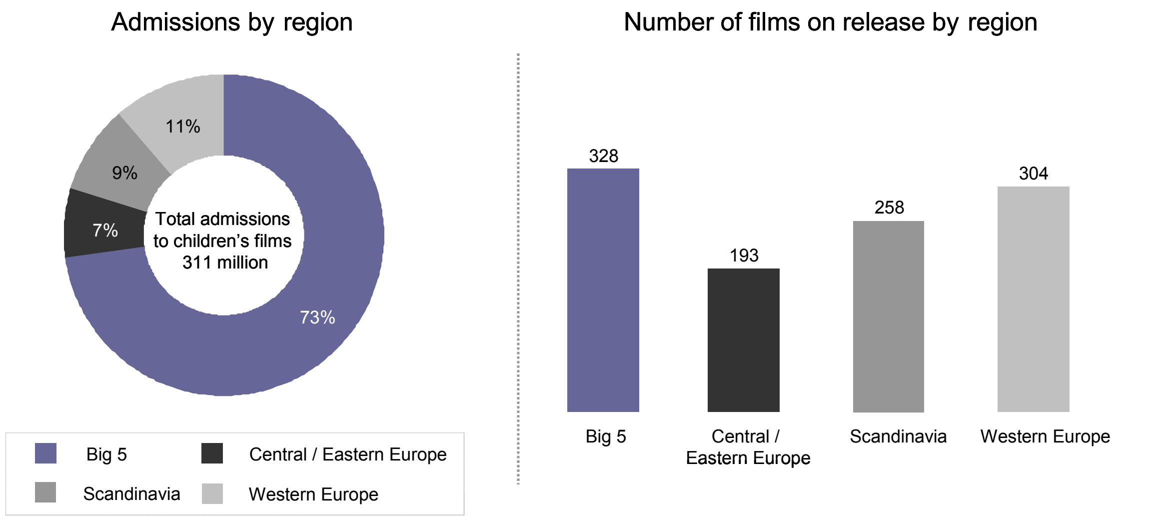
Comparing this pattern with the distribution pattern of European fiction films, it can be observed that a higher percentage of fiction films than children's films are released on only one European market: 53.4% of fiction films have a single release market, compared to 21.8% of children's films. This means that 46.6% of fiction films are released on 2 or more markets. At around 8 release markets, the patterns for fiction and children's films become closer, with 3.4% of fiction films released in 10 markets, compared to 4.3% of children's films.

Performance of European children's films

In the context of this study, the comparative performance of European children's films is measured by looking at average admissions. As mean admissions values are significantly influenced by films with extremely high or low admissions, median values give a clearer view of the 'average' admissions that a European film actually generates, and are thus preferred here.

As has been outlined in the description of the data sample, the 564 children's films studied here generated a total of 311 million admissions in the 29 European countries studied. Figure 6 shows the regional distribution of these admissions. Almost three-quarters of the total number of tickets sold to these films were sold in the five large Western European markets (the Big 5). The mid-sized and smaller Western European markets accounted for 11% of admissions to children's films and Scandinavia and Central and Eastern Europe for 9% and 7% of admissions respectively.

Figure 6: Admissions and number of sample films released by region 2001 - 2010



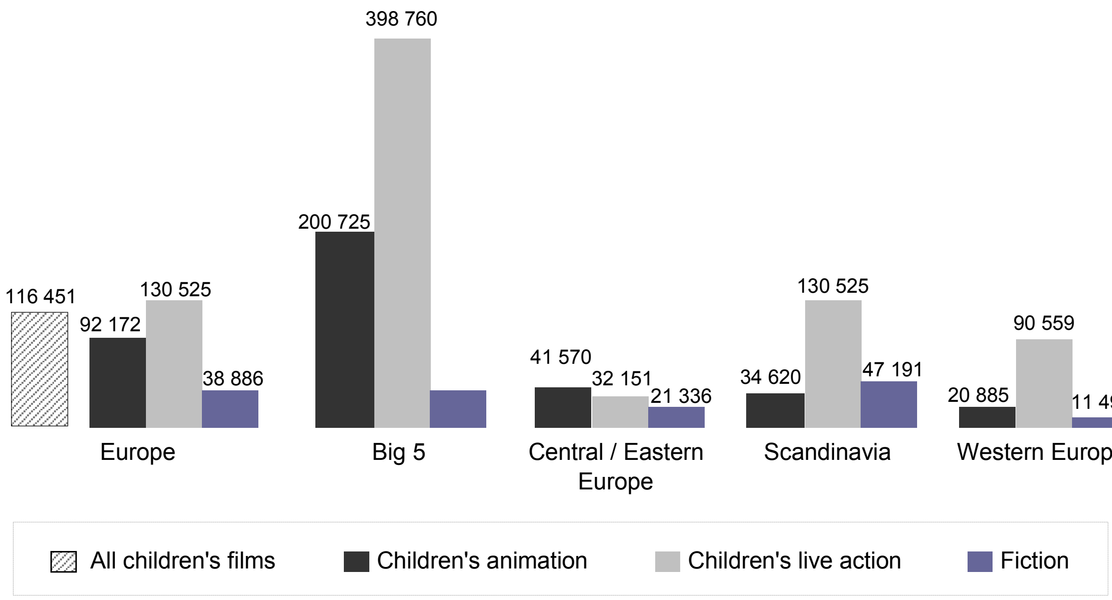
Source: European Audiovisual Observatory

Unsurprisingly, the Big 5 markets also had the highest number (328) of children's film on release over the period studied, closely followed by the Western European countries with 304, partly due the linguistic characteristics shared with two of the Big 5 markets, France and Germany, by some countries in this group. The number of films on release in Scandinavia, where markets are relatively small, contrasts with the lower figure for Central and Eastern Europe, which includes such large markets as Poland.

On average – using the median value - a European children's film generated cumulative admissions of 116 451 tickets sold. Median admissions for an animation film was 92 172 tickets sold and for a live action film 130 525 admissions. Both medians are significantly higher than that for a European fiction film, whose median admissions were 38 886.

Examining median admissions by region of origin allows a comparison of the performance of children's films of different origins. Both animation and live action films originating in the Big 5 countries achieved above-average results. Outside the Big 5 only live action children's films from Scandinavia reached the overall average figure for this film type. Live action films from all regions except Central and Eastern Europe scored higher median figures than their animation counterparts. Central and Eastern Europe animation thus achieved a better median result than children's live action films of the same origin.

Figure 7: Median admissions for European children's films by region of origin 2001 - 2010

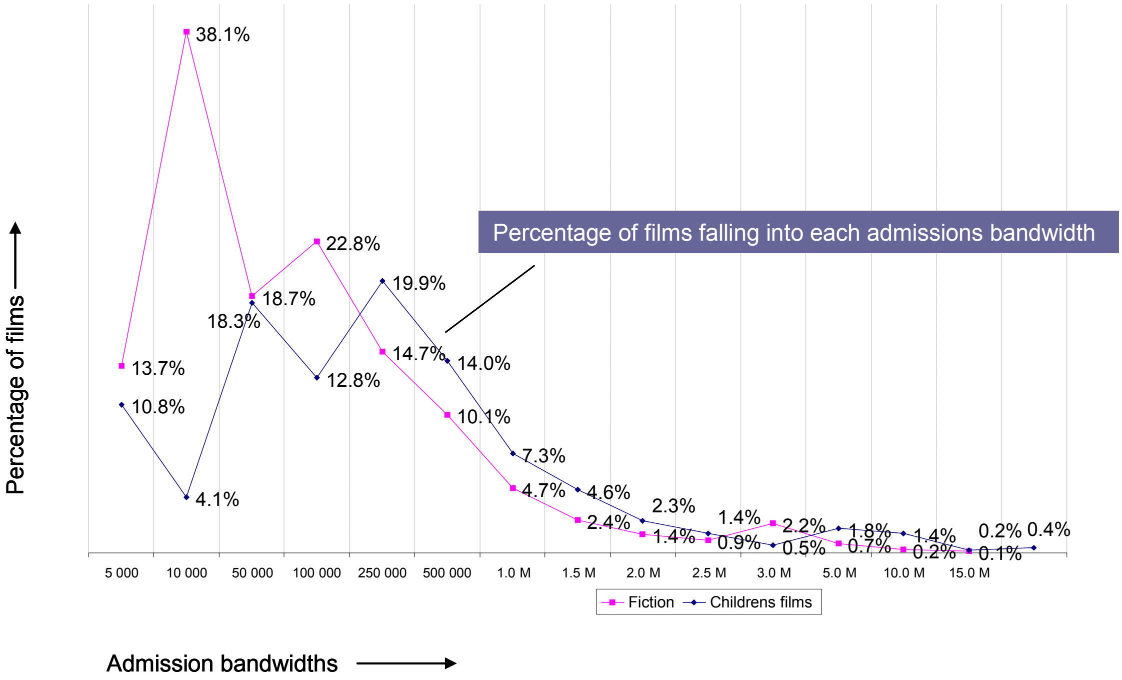


Source: European Audiovisual Observatory

Figure 8 shows the distribution pattern of films falling into a specific admissions bandwidth. The largest number of films falls into two categories: 19.9% of all films attracted between 100 000 and 250 000 admissions in the time period covered, and 18.3% generated between 10 000 and 50 000 admissions.

On a cumulative level, one third (33%) of all children's films in the data sample, generated less than 50 000 admissions in the time period covered and the vast majority (80%) did not top 500 000 admissions. Nonetheless, 13% of the films generated over 1 million admissions, with 40 films registering between 1 and 2 million admissions and 32 films generating more than 2 million. Three films in this group sold more than 10 million tickets across Europe.

Figure 8: Percentage of European live action children's films by admission bandwidths



Source: European Audiovisual Observatory

Measuring the market share of the top films can also serve as an indicator for market concentration. The top 20 children's films, i.e. 4% of the total number of films, accounted for 46% of total admissions and the top 50 films, i.e. 9% of the total number of films, accounted for 64% of total admissions. 80% of total admissions were generated by the top 100 films (18% of the total number of films).

The most successful European children's films

Arthur et les Minimoys and *Planet 51* were the most successful animation films for children in terms of admissions, selling 8.7 and 5.6 million cinema tickets respectively from release until end 2010 across Europe. Table 2 shows the full top 25 list of European animation films ranked by admissions. French and German films accounted for 20 films out of the top 25, and the remaining five films included one Spanish film, two Belgian and two Scandinavian animation titles. On a cumulative basis the top 25 animation films accounted for 67% of total admissions to the children's animation films in the data sample.

Table 2: Top 25 European animation films for children 2001 - 2010

#	Film	Country of origin	Production year	Director	Cumulative Admissions 2001-2010	Number release markets
1	Arthur et les Minimoys	FR	2006	Luc Besson	8 656 389	27
2	Planet 51	ES / GB	2009	J. Blanco & J. Abad	5 608 702	21
3	Arthur et la vengeance de Maltazard	FR	2009	Luc Besson	4 944 345	22
4	Sammy's avonturen: De geheime doorgang	BE / US	2010	Ben Stassen	3 656 093	17
5	Astérix et les Vikings	FR / DK	2006	S. Fjeldmark & J. Moller	3 636 280	23
6	Der Kleine Eisbär	DE	2001	T. Rothkirch & P. De Rycker	3 635 822	6
7	Arthur et la guerre des 2 mondes	FR	2010	Luc Besson	3 321 930	6
8	Lissi und der Wilde Kaiser	DE	2007	Michael Herbig	3 112 749	10
9	Niko - lentäjän poika	FI / DE / DK / IE	2008	M. Hegner & K. Juusonen	2 878 456	20
10	The Magic Roundabout	FR / GB	2005	D. Borthwick & J. Duval	2 598 293	12
11	Hui Buh	DE	2005	Sebastian Niemann	2 348 574	4
12	Kirikou et les bêtes sauvages	FR	2005	M. Ocelot & B. Galup	2 299 429	16
13	Der Kleine Eisbär 2 - Die geheimnisvolle Insel	DE	2005	T. Rothkirch & P. De Rycker	2 080 578	8
14	Die Konferenz der Tiere	DE	2010	H. Tappe & R. Kloos	1 947 578	4
15	Azur et Asmar	FR / BE / ES / IT	2006	Michel Ocelot	1 890 472	10
16	Lauras Stern	DE / BG	2004	T. Rothkirch & P. De Rycker	1 873 826	7
17	Fly Me to the Moon	BE / US	2008	Ben Stassen	1 798 900	21
18	Urmel aus dem Eis	DE	2006	H. Tappe & R. Kloos	1 532 927	10
19	Felix - Ein Hase auf Weltreise	DE / IT	2005	G. Lagana & G.M. Lagana	1 525 112	5
20	Happily N'Ever After	DE	2007	Y. Kaplan & P. Bolger	1 471 277	17
21	Les triplettes de Belleville	FR / BE / CA / GB	2002	Sylvain Chomet	1 442 621	22
22	La prophétie des grenouilles	FR	2003	J.R. Girerd	1 283 941	13
23	The Ugly Duckling and Me!	DK / DE / FR / IE	2006	M. Hegner & K. Kiilerich	1 221 339	14
24	Chasseurs de dragons	FR / LU / DE	2008	F. Hemmen & G. Ivernel	1 195 522	18
25	Prinzessin Lillifee	DE	2009	A. Simpson & A . Niebuhr	1 096 251	7
	Total Top 25				**67 057 406**	

Source: European Audiovisual Observatory

In numeric terms, German films dominate the list of the top live action films for children in the sample, with a total of 14 films appearing. Only five French films earn a place, though two of them occupy the first and third places ahead of the most successful German film, *7 Zwerge*, in fourth place. Four British films, an Italian and a Norwegian film complete the ranking. On a cumulative basis, the top 25 live action films accounted for 64% of total admissions to the live action films in the sample, thus demonstrating a slightly lower level of concentration than for animation.

Table 3: Top 25 European live action films for children 2001 - 2010

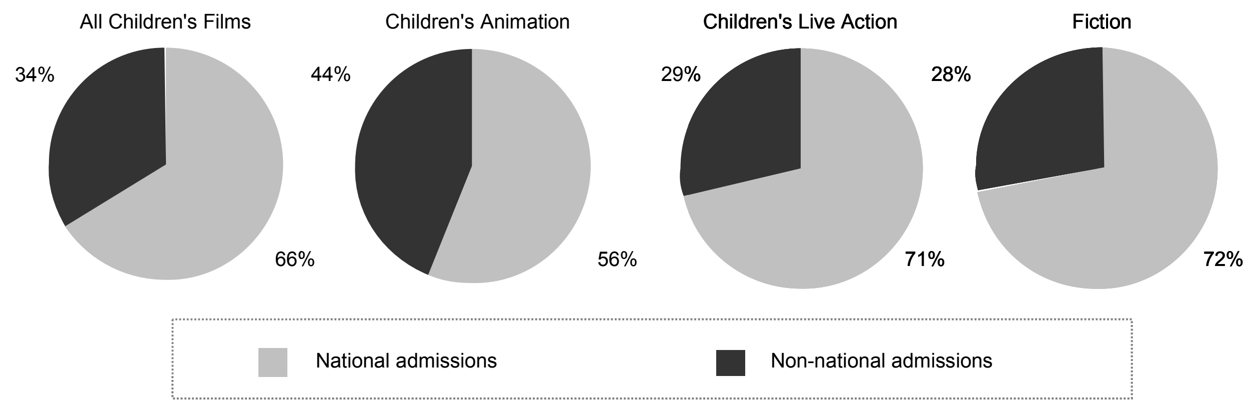
#	Film	Country of origin	Prod-uction year	Director	Cumulative Admissions 2001-2010	Number of release markets
1	Astérix & Obélix : Mission Cléopâtre	FR / DE	2002	Alain Chabat	22 010 841	26
2	Mr. Bean's Holiday	GB / FR / DE / US	2007	Steve Bendelack	15 527 899	27
3	Astérix aux jeux olympiques	FR / DE / ES / IT	2008	F. Forestier & T. Langmann	13 579 449	27
4	7 Zwerge	DE	2004	Sven Unterwaldt Jr.	7 901 072	5
5	Nanny McPhee	GB / US / FR	2005	Kird Jones	7 499 166	25
6	Le petit Nicolas	FR / BE	2009	Laurent Tirard	6 975 910	11
7	Pinocchio	IT / FR / DE	2002	Roberto Benigni	6 720 864	13
8	Wickie und die starken Männer	DE	2009	Michael Herbig	6 647 819	6
9	Nanny McPhee and the Big Bang	GB / US / FR	2010	Susanna White	5 679 172	22
10	Bend It Like Beckham	GB / DE	2002	Gurinder Chadha	4 803 367	22
11	Oliver Twist	FR / CZ / GB	2005	Roman Polanski	4 734 928	23
12	7 Zwerge - Der Wald ist nicht genug	DE	2006	Sven Unterwaldt Jr.	4 343 542	5
13	Le Renard et l'enfant	FR	2007	Luc Jacquet	3 125 773	23
14	Die Wilden Kerle 4	DE	2007	Joachim Masannek	2 773 197	3
15	Nirgendwo in Afrika	DE	2001	Caroline Link	2 464 343	19
16	Bibi Blocksberg	DE	2002	Hermine Huntgeburth	2 402 981	3
17	Die Wilden Kerle 3	DE	2006	Joachim Masannek	2 400 087	7
18	Hexe Lilli: Der Drache und das magische Buch	DE / AT / ES / IT	2009	Stefan Ruzowitzky	2 314 138	11
19	Das Fliegende Klassenzimmer	DE	2002	Tomy Wigand	2 193 132	6
20	Das Sams - Der Film	DE	2001	Ben Verbong	1 967 268	5
21	Emil Und Die Detektive	DE	2001	Franziska Buch	1 963 651	6
22	Die Wilden Kerle 5	DE	2008	Joachim Masannek	1 952 501	3
23	Wer früher stirbt, ist länger tot	DE	2006	Marcus H. Rosenmüller	1 841 965	4
24	Elling	NO	2001	Petter Naess	1 783 765	15
25	Die wilden Kerle 2	DE	2005	Joachim Masannek	1 703 563	7
	Total Top 25				135 310 393	

Source: European Audiovisual Observatory

The role of non-national markets for the performance of European children's films

To what extent do European children's films depend on a theatrical release outside of their national markets? Figure 9 shows the overall share of national and non-national admissions for the three types of films in the data sample.

Figure 9: Comparison of national vs. non-national admissions by film type

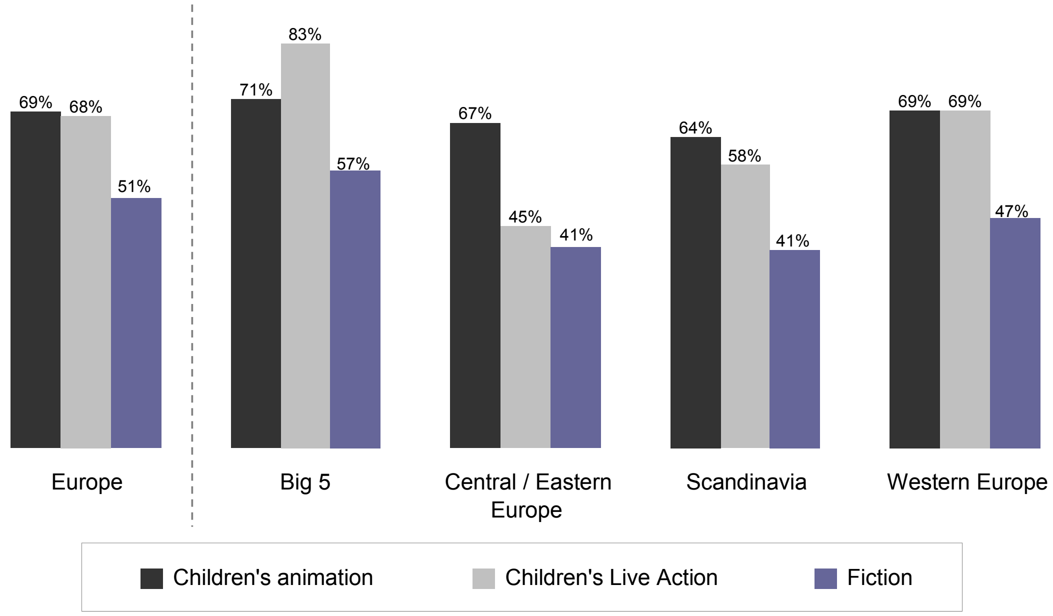


Source: European Audiovisual Observatory

Fiction films are the most dependent on national markets for their success, with 72% of their total admissions registered in the domestic markets of these films. Children’s live action films have a similar profile, with 71% of tickets to these films being sold in the producing country. Unsurprisingly, animation films are notably less dependent on their country of production to generate admissions, registering 56% of admissions on the national market and a high level of 44% of admissions in other European territories. This result goes in tandem with the higher average number of release markets for animation films (4.1 release markets on average, as opposed to 3.7 for live action films).

Figure 10 overleaf shows the importance of non-national releases for the three types of films in the sample. Live action films from the Big 5 countries demonstrated the highest regional propensity to non-national release (83%). This was the only region for which live action films showed a higher propensity to non-national release than that of animation films. In Central and Eastern Europe, in Scandinavia and in Western Europe, children’s animation films were either more likely or equally likely to be released in at least one European territory outside the domestic market. As a result, for European children’s films as a whole, animation and live action have similar propensities to non-national release, with 69% of animation films and 68% of live action films released in at least one non-domestic market. European fiction films, on the contrary, show a far lower propensity to non-national release, with just 51% of them circulating outside the national market. Fiction films from the Big 5 countries do slightly better than the European average, with 57% of them released outside these markets. Nonetheless this is clearly inferior to the non-national release rates for the children’s films from these countries, which achieve non-national release rates of 71% for animation and 83% for live action.

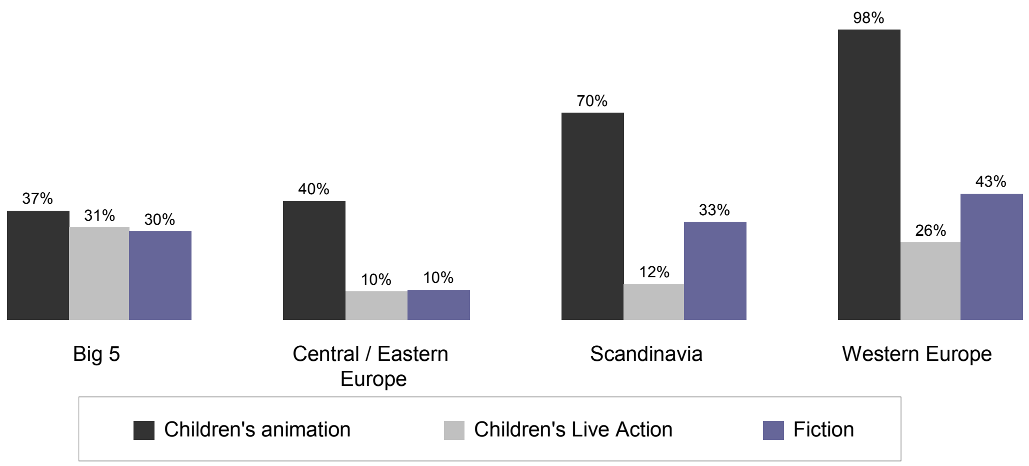
Figure 10: Percentage of films with non-national release by region of origin 2001 - 2010



Source: European Audiovisual Observatory

Comparing films from the different regions, it becomes clear that non-national admissions are very important to animation films produced in Scandinavia and in Western European countries where non-national admissions account for 70% and an estimated 98% respectively. Live action children's films generally depend more heavily on success in their home markets, with non-national admissions only accounting for 10% and 12% respectively of admissions to live action films from Central and Eastern Europe and Scandinavia.

Figure 11: Share of non-national admissions by region of origin 2001 - 2010



Note
The share of non-national admissions for Western European animation films is estimated.

Source: European Audiovisual Observatory

Which films were particularly successful outside of their national markets? Table 4 shows the 15 animation films which generated the highest number of non-national admissions in the reference period.

Table 4: European children's animation films with highest non-national admissions 2001 - 2010

#	Film	Country of origin	Production year	Director	Cumulative non-national admissions 2001-2010	% share non-national admissions	Number of non-national release markets
1	Arthur et les Minimoys	FR	2006	Luc Besson	4 598 767	53%	26
2	Planet 51	ES / GB	2009	J. Blanco & J. Abad	3 766 508	67%	20
3	Sammy's avonturen: De geheime doorgang*	BE / US	2010	Ben Stassen	3 701 172	*96% est.*	17
4	Niko - lentäjän poika	FI / DE / DK / IE	2008	M. Hegner & K. Juusonen	2 645 173	92%	19
5	Astérix et les Vikings	FR / DK	2006	S. Fjeldmark & J. Moller	2 271 614	62%	22
6	Fly Me to the Moon	BE / US	2008	Ben Stassen	1 740 362	97%	20
7	The Magic Roundabout	FR / GB	2005	D. Borthwick	1 692 629	65%	11
8	Arthur et la vengeance de Maltazard	FR	2009	Luc Besson	1 607 149	33%	21
9	Happily N'Ever After	DE	2007	Y. Kaplan & P. Bolger	1 431 924	97%	16
10	The Ugly Duckling and Me!	DK / DE / FR / IE	2006	M. Hegner & K. Kiilerich	1 113 045	91%	13
11	Der Kleine Eisbär	DE	2001	T. Rothkirch & P. De Rycker	893 031	25%	5
12	Urmel aus dem Eis	DE	2006	H. Tappe & R. Kloos	851 639	56%	9
13	Pettson och Findus 3: Tomtemaskinen	SE / DK / GB / HU	2005	J. Lerdam & A. Sorensen	828 715	78%	8
14	Lissi und der Wilde Kaiser	DE	2007	Michael Herbig	825 795	27%	9
15	Disco ormene	DK / DE	2008	T.B. Nielsen	739 845	82%	8

*3D animation. No data on admissions in the national market, Belgium, is available, but the ratio of national to non-national admissions has been estimated on the basis of data for a comparable film, *Fly Me to the Moon*, also 3D animation.

Source: European Audiovisual Observatory

Table 5: European children's live action films with highest non-national admissions 2001 - 2010

#	Film	Country of origin	Prod-uction year	Director	Cumulative non-national admissions 2001-2010	% share non-national admissions	Number of non-national release markets
1	Mr. Bean's Holiday	GB / FR / DE / US	2007	Steve Bendelack	11 149 873	72%	26
2	Astérix & Obélix : Mission Cléopâtre	FR / DE	2002	Alain Chabat	8 053 768	37%	25
3	Astérix aux jeux olympiques	FR / DE / ES / IT	2008	F. Forestier& T. Langmann	7 209 725	53%	26
4	Nanny McPhee	GB / US / FR	2005	Kirk Jones	3 975 333	53%	24
5	Oliver Twist	FR / CZ / GB	2005	Roman Polanski	3 433 868	73%	22
6	Nanny McPhee and the Big Bang	GB / US / FR	2010	Susanna White	2 849 491	50%	21
7	Bend It Like Beckham	GB / DE	2002	Gurinder Chadha	2 414 896	50%	21
8	Wickie und die starken Männer	DE	2009	Michael Herbig	1 726 030	26%	5
9	Le petit Nicolas	FR / BE	2009	Laurent Tirard	1 603 519	23%	10
10	Le Renard et l'enfant	FR	2007	Luc Jacquet	1 343 211	43%	22
11	7 Zwerge	DE	2004	Sven Unterwaldt Jr.	1 127 490	14%	4
12	Hexe Lilli: Der Drache und das magische Buch	DE / AT / ES / IT	2009	Stefan Ruzowitzky	1 068 274	46%	10
13	Elling	NO	2001	Petter Naess	1 026 534	58%	14
14	Nirgendwo in Afrika	DE	2001	Caroline Link	811 743	33%	18
15	7 Zwerge - Der Wald ist nicht genug	DE	2006	Sven Unterwaldt Jr.	763 558	18%	4

Source: European Audiovisual Observatory

Part 2:
Television for children

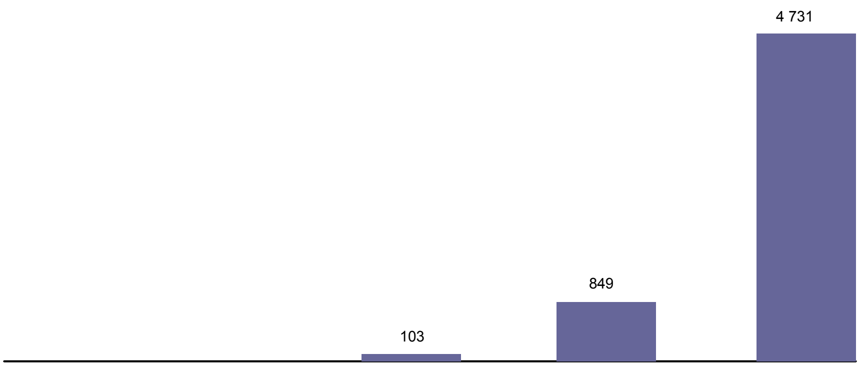
TV channels for children: the European landscape

Television for children has been an area of strong growth in Europe over the last 10 years and one of the most striking illustrations of this dynamism is the multiplication of channels specifically dedicated to children. Young viewers, even those whose access is limited to free channels, have more and more choices, not only in terms of television channels but increasingly also in terms of when and how to view television content.

The multiplication of television services over the last 20 years has been underpinned both by technological advances (digital technology, increased capacity on European satellite systems, advent of IPTV, …) but also by changes in the regulatory environment. Figure 12 provides a graphic illustration of the expansion in offer, taking as its starting point research by British consultancy Screen Digest. In 1990 Screen Digest analysts estimated the number of television channels in Europe at around 103 and ten years later the same source estimated the European total at 849. By the end of 2010, using the MAVISE database, the European Audiovisual Observatory counted a total of 4,731 national and international channels available in 29 European countries.

Figure 12: Number of television channels by genre in Europe 1990 - 2010

Estimated



Channel genre	1990	2000	2010
General	75	210	455
Sport	0	68	549
Film	7	120	422
Music	3	56	309
Children's	**1**	**64**	**275**
Other	17	331	2 721
Total	**103**	**849**	**4 731**

Note
Data for 1990 and 2000 does not include small local channels. 2010 data covers channels available in 29 European countries and includes extra-European channels available in Europe. It excludes regional and local channels. Coherency of measurement methodology between the two series cannot be gauranteed, hence data is estimated.

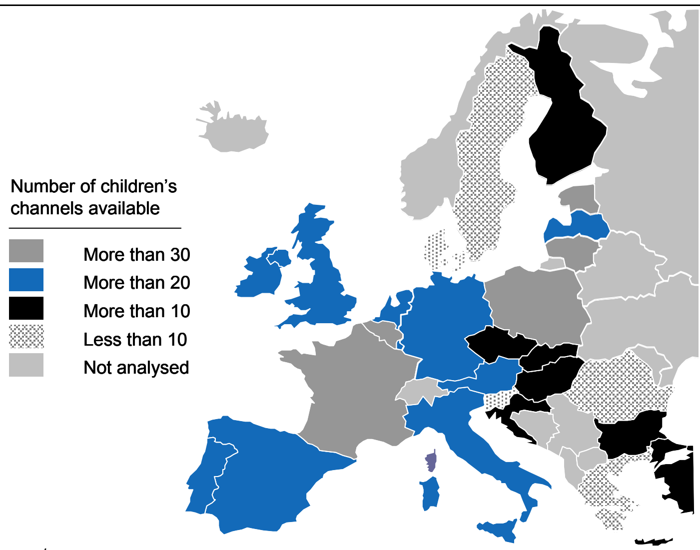
Sources: 1990 and 2000 – Screen Digest, 2010 – MAVISE database/European Audiovisual Observatory.

Though the number of generalist channels grew strongly, one of the more notable trends over the period 1990 to 2000 was the emergence of a multiplicity of niche or thematic channels. Among these, certain channel genres proved more popular than others. This was the case particularly for film channels, with approximately 113 additional channels of this type established in the period between 1990 and 2000. Though no dedicated sports channels were registered in 1990, this type of channel multiplied rapidly over the following years. By 2000 a total of 68 channels in this genre were available. Channels for children multiplied at an equivalent rate, with an additional 63 channels available in 2000 compared to 1990.

In the decade which followed, the film and sport genres maintained their popularity, with the number of channels of these two types going from 188 in 2000 to 971 at the end of 2010. Once again, channels for children were also popular, with 275 dedicated channels available at the end of 2010, compared to 64 in 2000, a net gain of 211 channels.

The 2010 channel data shown in Figure 12 is based on the channels available in Europe, that is, the number of channels which can be seen by viewers in Europe, provided they have suitable equipment and/or subscriptions. Figure 13 below illustrates the pattern of availability of channels for children across Europe and shows that there are large differences in the number of channels available to young viewers depending on their geographical location.

Figure 13: Number of children's channels available per country



Note

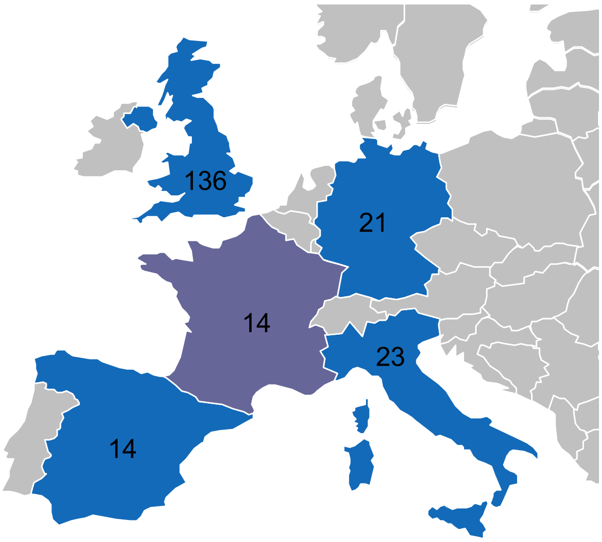
As of December 2010

Source: MAVISE database / European Audiovisual Observatory

With 45 different children's channels available, the Flemish-speaking Community of Belgium has the the largest offer in this channel genre. Poland, Estonia, France and Lithuania all have over 30 channels for children available. The United Kingdom, Spain, the Netherlands, Italy, Germany and a number of smaller Western European markets all have between 20 and 30 channels available for younger viewers. Two Scandinavian countries, Denmark and Sweden, are among the smaller group of countries with less than 10 channels available.

Channels available in these countries include both European channels and extra-European channels accessible to viewers in European countries. However, another approach to channel supply is to look at the number of channels which are established in European countries and which are specifically for children. These channels may target countries other than their countries of establishment. Figure 14 shows the number of children's channels established in each of the five large Western European markets. The United Kingdom stands out in terms of the number of this type of channel established there, with 136 different children's channels licensed. This reflects the fact that numerous pan-European channels are licensed in Britain and that each linguistic version of these channels is counted here as a separate channel.

Figure 14: Number of children's channels established in major territories



Note

As of September 2011

Linguistic versions of channels are considered as distinct channels.

Source: MAVISE database / European Audiovisual Observatory

There are currently three broad categories of children's channel available in television households in the European Union. These are:

1. National television channels;
2. Foreign national television channels;
3. Pan-European children's television channels.

1. National television channels for children

Most European Union countries have a nationally established channel which targets children. Exceptions to this rule include some of the smaller television markets such as Estonia, Slovenia, Slovakia, Malta, Latvia, Lithuania and Hungary. Few niche channels are established in these countries given the lack of potential revenues and the absence of the resources necessary to support them. An exception to this rule is Cyprus, where there is one national private children's channel, Capital Junior. Larger countries have multiple children's channels, including ten channels in Italy, eight in France and four in Germany and Spain. Among the smaller countries, Belgium benefits from six national children's channels. Table 6 lists the principle national television channels for children established in EU countries – most of these are established by private rather than public broadcasters.

Table 6: National television channels for children

Country	Public Children's Channels	Private Children's Channels
Austria		Super RTL Österreich (window of German channel)
Belgium	Ketnet, La Trois	Club RTL, Studio 100 TV, VTMkzoom, VTMkzoom +
Bulgaria		Super 7, DKTE (Ekids)
Cyprus		Capital Junior
Czech Republic		CS Mini, Minimax
Denmark	Ramasjang	
Finland		Sub Juniori
France	Gulli (a joint venture between public and private TV)	Berbère Jeunesse, Canal J, Mangas, Piwi, Télétoon, Tiji, Boing (France)
Germany	KIKA	Junior, Loko, Super RTL
Italy	RAI Gulp, RAI Yoyo	Boing TV, Cooltoon, DeaKids, Fast Game, Fast Kids, Frisbee, Hiro, K2
Netherlands	101 TV, Zappelin 4	Pebble TV
Poland		Mini Mini, ZigZap
Portugal		Canal Panda, Panda Biggs TV, SIC K, TVC HD
Romania		Boom Hop, Boom Smarty!
Spain	Clan TVE	Boing (Spain), Canal Infancia, Pocoyo
Sweden	SVTB	
United Kingdom	CBBC	Cartoonito, CITV, Kix, Pop!, Popgirl

Note
As of December 2010. This list does not include channels targetting babies and children under 6, such as Baby TV, Baby First, Bebe TV, Cbeebies, etc.

Source: MAVISE database / European Audiovisual Observatory

2. Foreign national channels

In most countries, non-national channels targetting children are available. Examples include the availability of the German children's channels in Austria and the British children's channels in Ireland (easily exported due to the shared languages). Two of the German children's channels, in particular the public channel KIKA and the private channel Super RTL, are available in a wide range of European countries, though possibly only on a limited number of platforms. A number of channels which are not based in the European Union, such as the Al Jazeera Children's channel (Qatar), are also quite widely available.

Table 7: Foreign national children's channels

Country	Channel	Also available in
Czech Republic	Minimax	Slovak Republic, Romania, Hungary (versions in Romanian and Hungarian)
France	Canal J	Belgium Flemish and French-Speaking Communities, Luxembourg
	Gulli	Belgium Flemish and French-Speaking Communities, Luxembourg
	Mangas	Belgium Flemish and French-Speaking Communities, Luxembourg
	Tiji	Belgium Flemish and French-Speaking Communities, Luxembourg, Slovenia
	Télétoon	Belgium Flemish and French-Speaking communities
Germany	KIKA	Austria, Belgium Flemish-Speaking Community, Bulgaria, Czech Republic, Denmark, Estonia, France, Hungary, Lithuania, Luxembourg, Netherlands, Slovak Republic, Slovenia
	Junior	Austria, Luxembourg
	Super RTL	Austria, Belgium Flemish-Speaking Community, Bulgaria, Czech Republic, Denmark, Estonia, Finland, France, Hungary, Latvia, Lithuania, Luxembourg, Netherlands, Poland, Romania, Slovak Republic, Slovenia,
Italy	RAI Gulp	Belgium (French-speaking Community), Belgium (Flemish-speaking Community), Luxembourg, Poland
Sweden	SVBT	Finland
United Kingdom	CBBC	Belgium Flemish and French-Speaking Communities, Ireland, Netherlands
	Tiny Pop	Czech Republic
	Cartoonito, CITV, Pop!, PopGirl, Kix	Ireland

Source: MAVISE database / European Audiovisual Observatory

3. Pan-European children's channels

Though a number of European children's channels are available in more than one European country (as illustrated in Table 7), the only truly pan-European channels for children in the European Union are those owned by US companies and are thus private. These companies have subsidiaries in the EU from where they license their channels, generally in the United Kingdom (many of the linguistic versions), the Netherlands (including Nordic language versions), the Czech Republic (many linguistic versions for Central and Eastern Europe), France, Germany, Italy and Spain. These are all available in a wide variety of linguistic versions. Table 8 overleaf gives an overview of the companies, their channels, and the countries where they are available.

Table 8: Pan-European children's channels

Company	Channels (available in different linguistic versions)	One or more channels available in:
Liberty Global (and via Chellomedia)	JimJam, Minimax	Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Greece, Hungary, Italy, Netherlands, Poland, Portugal, Romania, Slovenia
NBC Universal	Kidsco	Belgium, Cyprus, UK, France, Germany, Greece, Hungary, Poland, Portugal, Romania, Slovenia, Spain
The Walt Disney Company	Disney Channel, Disney Cinemagic, Disney Travel, Disney XD, Playhouse Disney, Toon Disney	Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom.
Time Warner (via Turner Entertainment Networks)	Boomerang, Cartoon Network, Cartoon Network Too, Cartoonito	Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovak Republic, Slovenia, Spain, Sweden, United Kingdom
Viacom INC (via MTV Networks and Nickelodeon UK)	Nickelodeon, Nickelodeon HD, Nick, Nick Jr, Nick Hits, Nicktoons, Nick Replay,	Austria, Belgium, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovenia, Spain, Sweden and the United Kingdom.

Note
As of December 2010

Source: MAVISE database / European Audiovisual Observatory

Animation on European TV

Animation is consistently among the most popular programming both on children's channels and in children's segments on generalist channels. For example, data from the *Médiamétrie* – Eurodata TV Kids TV Report[13] for the period July to December 2010 showed that animation programmes were the most popular among the 4 to 14 year-old age groups in four out of the five large European markets. For the period that followed (January to June 2011) animation reigned unchallenged as the most popular programme in all five of the major markets.

Though ubiquitous US series such as *The Simpsons* and *SpongeBob Squarepants* are among those popular programmes, they are not alone: European and Japanese animation series are the most popular programmes for children and young people in two out of the five countries covered by the Eurodata TV survey. Given these national differences, this chapter takes a broader look at the origin and volume of animation broadcast on a group of 137 channels in 15 different European countries.

About the data

Data on the number of animation broadcasts and the hourly volume of animation programmed is provided by **Infomedia / Rovi International Solutions**, a supplier of TV listings data serving all of Europe. The sample of channels analysed, drawn up in collaboration with the European Audiovisual Observatory, has been chosen to provide a representative view of each of the fifteen Western European markets included. Generalist channels with children's segments are well covered, with 47 public service channels and 40 major commercial channels included in the sample, but not all the dedicated children's channels available in the countries studied are included.

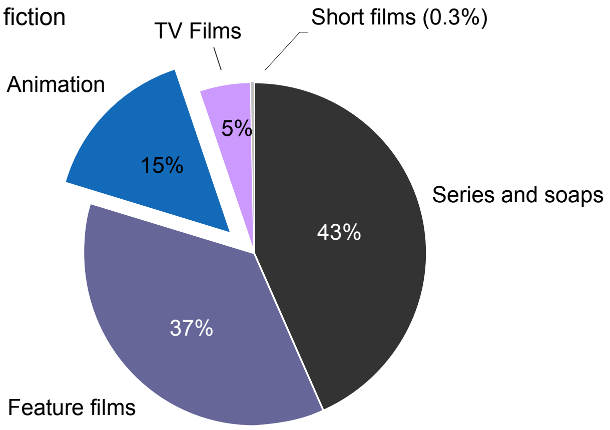
The main focus of the data is on the programming of fiction on the 137 channels tracked. This fiction offering has been split into five different categories: 1) feature films; 2) TV films; 3) short films; 4) series and soaps and 5) animation. It should be noted that animated feature films are included in the category 'feature films', rather than under 'animation' and that the short film category may contain some animation.

The data studied in this section covers the year 2009 but, given the relative stability over time both in the volume of animation programmed on the sample channels and in the origin of that animation, but is nonetheless almost certainly still representative of animation programming on European television at the time of writing.

13 http://www.mediametrie.com/eurodatatv/

Figure 15: Share of animation in fiction of all origins broadcast in Europe 2009

In % of total hourly volume of fiction



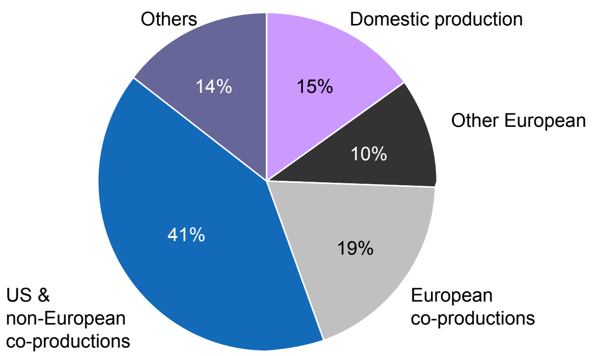
Note
Covers 15 European countries and 137 different television channels

Source: European Audiovisual Observatory after Infomedia

Animation represents a relatively small segment of the total fiction of all origins broadcast on the major Western European television channels covered in the sample. Series and soaps account for almost half (43%) of the total hourly volume of fiction transmitted and feature films (which includes animated features) account for a further 37%. At 15% the share of animation (generally animated series) is relatively modest compared to these two leading genres. Animation's share of the volume of European fiction broadcast is somewhat higher, at 17%, and this is partly at the expense of feature films and series and soaps, which account for 35% and 41% respectively of the total of European fiction broadcast.

Figure 16: Origin of animation broadcast in Europe 2009

In % of total hourly volume of animation broadcast



Note
Covers 15 European countries and 137 different television channels

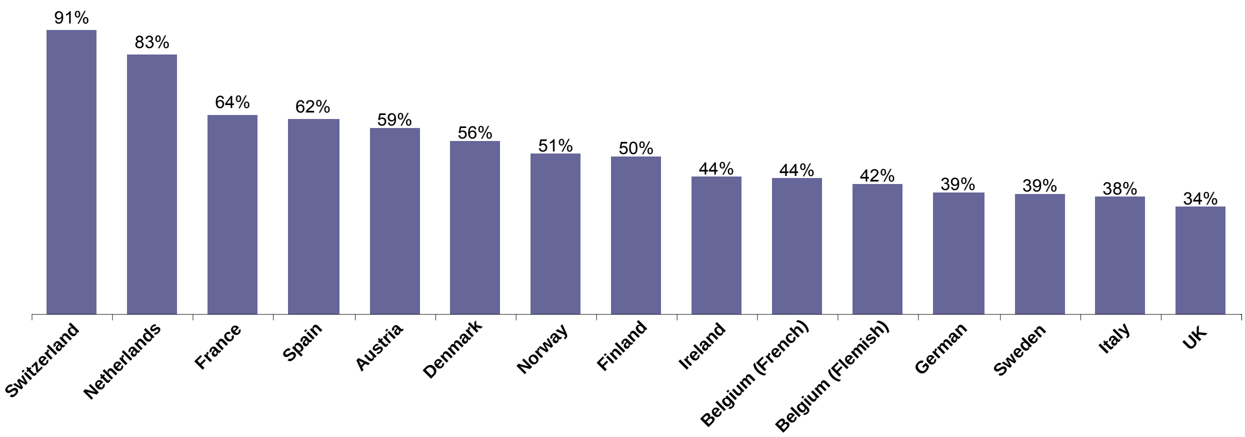
Source: European Audiovisual Observatory after Infomedia

Figure 16 illustrates the origin of the animation broadcast on the channels in the sample. Though animation sourced from the United States or co-financed / co-produced by non-European countries accounts for over 40% of the volume of animation broadcast, European animation is in fact more present on European television, accounting for a total of 44% of animation hours broadcast in 2009.

This total for European animation splits into the following elements. Firstly, domestically produced animation screened on the national public and private channels – this accounts for 15% of the total. Secondly, animation imported by national channels from other European countries amounts to 10% of the hourly volume, and lastly, animation produced as European co-productions is a key component, accounting for 19% of the overall total. The 'other' segment here includes in particular Japanese anime, a popular element of animation programming for younger viewers on certain European channels, notably in France.

Figure 17: Share of European animation by country in 2009

In % of total hourly volume of animation broadcast



Source: European Audiovisual Observatory after Infomedia

European television channels accord varying importance to European animation in their programming. During 2009 the Swiss channels covered in the study sample (SF1, TSI 1 and TSR 1) programmed a relatively low volume of animation, but this was almost exclusively of European origin. Dutch, French and Spanish channels also integrated substantial proportions of European animation in their programming. At the other end of the spectrum, the channels covered in Sweden, Italy and the United Kingdom accorded relatively less importance to European animation. This is partly influenced by the choice of channels – for example the Swedish channels covered do not include the dedicated public service children's channel. In contrast the UK sample includes a number of dedicated animation channels, such as Cartoon Network and Nickelodeon, whose programming is principally non-European in origin. For example 78% of the animation programmed on Nickelodeon comes from non-European sources. In contrast, 91% of the animation programmed on BBC channel, Cbeebies, is of European origin, principally domestic. Nonetheless, the sheer volume of animation programmed by channels such as Cartoon Network and Disney XD means that the overall figure for the United Kingdom is the lowest in the sample.

The relative importance of domestic animation production in television schedules is illustrated in Table 9. The Spanish channels covered did not import any animation at all from other European countries, preferring to concentrate on domestic production and supplementing this with animation imported from the US and Japan. Italian channels also generally preferred domestically produced animation over imports from other European countries (despite programming small amounts of Spanish, French and German-origin animation). Nonetheless, these channels weighted their overall mix heavily in favour of US and Japanese productions.

Table 9: Importance of domestic animation production

#	Channels in ...	Domestic animation as a share of European animation	Domestic animation as a share of all animation
1	Spain	100%	62%
2	Italy	76%	29%
3	France	51%	33%
4	Switzerland	46%	42%
5	UK	28%	10%
6	Denmark	26%	15%
7	Netherlands	22%	19%
8	German	18%	7%
9	Belgium (Flemish)	15%	6%
10	Ireland	12%	5%

Note
Domestic animation excludes European co-productions, which may be considered as domestic in more than one European country.
Not all countries covered in the sample are shown.

Source: European Audiovisual Observatory after Infomedia

The German channels covered in this sample had the third highest overall total volume of animation programming, after the United Kingdom and France. Despite this, the proportion of domestic animation programmed was relatively low, representing 18% of total European animation programmed, and just 7% of all animation. Two smaller markets, the Flemish-speaking Community of Belgium and Ireland, also programmed low volumes of nationally-produced animation, though in both cases the exclusion of European co-productions has an impact on the overall percentage.

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Appendices

Appendix 1: European live action and animation films for children – methodology and definitions

As has been stated, the objective of this study is to analyse the origin, theatrical circulation and performance of a representative sample of European children's films and to compare the relative performance of live action and animation films within the sample. This analysis is rendered possible by the establishment of a set of methodological parameters. To allow the reader to understand the methodology applied and the data population used in the analysis, the major parameters used in designing the study are described in the following paragraphs.

What is a 'children's' film'?

There is no universally accepted and consistent definition of a 'children's film' which could be applied across Europe. Hence, the definition of 'children's film' used in the context of this report is that implied by the sample population which aims to cover feature length films, either live action or animation, made for children up to 12 years. As a general rule, the films included have received an age recommendation no higher than 12 years from the German FSK (*Freiwillige Selbstkontrolle der Filmwirtschaft GmbH*). However, not all films in the sample have received an FSK rating and some may have received a local rating higher than 12 years in other countries.

European live action vs. animation films vs. fiction films?

Live action films are defined as films featuring live acting by actors and animated films those principally composed of sequences made using any kind of animation technique (cell, CGI, claymation, puppet animation, etc...). Films including both live action as well as animation, such as *Hui Buh* or *Arthur et les Minimoys,* have been included in the animation category where it is considered that the animation element prevails. Fiction films are drama feature films other than films appearing in the children's film data sample and excluding, of course, feature documentaries. All the films studied in Part 1 of this report are considered as of European origin by the European Audiovisual Observatory.

What is the time period covered?

When analysing the circulation of films it is crucial to capture as much of a film's theatrical life cycle as possible. In order to do so the study looks at <u>cumulative admissions</u> for the sample films between 2001 and 2010. Films released in 2010 will therefore have only part of their entire career included.

Where does the data come from?

The children's film data sample used in this report has been created in two different ways. For children's live action films, an initial sample was drawn up in 2009 using lists supplied by the European Children's Film Association (ECFA) and supplemented with lists of films presented at relevant festivals by the KIDS Regio sub-group of Cine-Regio, the European network of regional film funds. This list was updated by ECFA/KIDS Regio in 2011 and further identification of films was carried out by the Observatory. For animation films, existing data in the Observatory's LUMIERE database was supplemented with the assistance of CARTOON, who provided lists of completed animation titles presented at CARTOON Movie since 1999. A number of animation films, clearly intended for young adults or adults, were excluded from the sample. In relation to animation films, it should be noted that the LUMIERE database cannot claim to be entirely comprehensive in its recognition of animation films.

The data on film admissions which is used to study the circulation and performance of the films in the sample comes from the European Audiovisual Observatory's LUMIERE database. Data on film admissions collated in the LUMIERE database comes from a wide variety of sources, including national film agencies and statistics offices, inter-industry bodies, distributors' and exhibitors' associations, the trade press and a small number of private tracking bodies. This is supplemented and completed by data from the European Union's MEDIA Programme, on the basis of declarations made by distributors to its Automatic Distribution Support scheme.

Which markets are covered by the LUMIERE database?

Though the LUMIERE database aims to cover 37 different European markets, in practice coverage rates vary across individual territories. The overall coverage of the database for the reference period is estimated at around 86% of the total European market in the sample period.

A point to note concerns the data available in the database for the United Kingdom and the Republic of Ireland. Admissions data for these two countries are available to the Observatory only on a cumulative basis, i.e. the admissions for an individual film cover the tickets sold both in the UK and in Ireland. On the other hand, the database does distinguish between films originating in the United Kingdom and films originating in the Republic of Ireland, even if it is not possible to split admissions results for these titles into UK and Irish admissions respectively. This approach results, for certain calculations, in a minor bias that is without invalidating consequences for the analysis as a whole. It should also be noted that 2010 data is still provisional for a number of countries as some information, e.g. full results for Spain as well as distributor declarations to the MEDIA programme, is still missing at the time of writing. This means that the coverage for 2010 is slightly less comprehensive than that for earlier years.

How is a film allocated to its 'country of origin'?

Each film is allocated a unique country of origin within the LUMIERE database. This country of origin corresponds to the country of the producer(s) of the film. In the case of productions involving producers from more than one country, the film is assigned to the country which provides the majority share of production financing.

How is 'circulation' measured?

Circulation in the context of this study is measured by the average number of territories in which the different types of films are released. Another indicator for circulation is the propensity to travel, i.e. the percentage of films obtaining a release outside of their domestic (national) markets.

How is 'performance' measured?

The performance of live action children's films in the context of this study is measured by their average admissions, on their national and non-national markets as well as on a total level.

What are 'admissions'?

Admissions are defined as the number of tickets sold.

How is 'average' defined?

In the context of this study an average value can be expressed either as the 'mean' or the 'median' value. It will be pointed out at each occurrence in the text to which of the two terms the word 'average' refers. The mean refers to the arithmetical total of all the values in the array divided by the number of values. The median is found by arranging the values in order and selecting the middle value.

How are 'national' and 'non-national' markets defined?

National admissions are defined as admissions in the country of origin of the film. All other markets – including other co-producing countries – are considered as non-national markets. For example Italy is considered the national market for *Pinocchio,* an Italian, French and German co-production. The releases in France and Germany are counted as non-national releases.

How are the regions defined?

Several indicators are also analysed by regions of origin. In the context of this study the following four regions are defined:

- **Big 5:**

  France, Germany, Italy, Spain and the United Kingdom;

- **Western Europe:**

  Austria, Belgium, Ireland, Iceland, Ireland, Luxemburg, the Netherlands, Portugal and Switzerland;

- **Scandinavia:**

  Denmark, Finland, Norway and Sweden;

- **Central / Eastern Europe (CEE):**

  Bulgaria, Croatia, Czech Republic, Estonia, Latvia, Hungary, Poland, Romania, the Russian Federation, Slovakia, Slovenia and Turkey.

Understanding the data sample

As has been outlined, the circulation of European children's films is analysed here on the basis of a data sample drawn up by the European Audiovisual Observatory with the assistance of a number of external sources, and on the corresponding admissions data drawn from the Observatory's LUMIERE database.

Which films are taken into consideration?

The sample used in this report comprises a total of 564 European children's films with cumulative admissions of 311.5 million tickets sold between 2000 and 2010. 227 of these films are animated features, with total admissions of just over 100 million and 337 of these are live action works, with a total of 211 million tickets sold over the period 2000 to 2010.

Appendix 2: Major European children's channels in terms of distribution

Country [1]	Media Group/ Groups	Broadcasting company	Channel [2]	Nb of chan-nels [2]	Statute	Distribution
Belgium	VRT	VRT - De Vlaamse Radio- En Televiseomroep	Ketnet / Canvas, Ketnet / Canvas HD, Ketnet+ / Canvas+	6	Public	BE, LU, NL
Czech Republic		Československá filmová společnost, s.r.o.	CS Mini	1	Private	CZ, SK
	Liberty Global	Chello Central Europe, S.R.O.	Minimax (3)	3	Private	CZ, HU, RO
	Viacom INC	MTV Networks s.r.o.	Nickelodeon (2)	2	Private	CZ, PL, SK
	The Walt Disney Company	Jetix Europe Channels B.V.	Disney Channel (7)	7		BG, CZ, HU, RO, RU, SK, SI
Germany	ARD	KIKA	KIKA	1	Public	AT, BG, CZ, DE, DK, EE, FR, HU, LT, LU, SK
	EM TV Merchandising & Aktiengesellschaft	Junior TV GmbH	Junior	1	Private	AT, DE, LU
	RTL Group/ Walt Disney Company	Super RTL Disney Fernsehen GmbH	Super RTL (windows in Super RTL Österreich, Super RTL Schweiz)	3	Private	AT, BG, CH, CZ, DE, DK, EE, FI, FR, HU, LT, LU, SK
	Sony Pictures Television International	Sony Pictures Television International Deutschland GmbH	Animax Deutschland	1	Private	AT, DE
		RTVD Video- und Filmproduktions GmbH	Detski Mir	1	Private	BG, DE, EE, FR, LT, LV, RU
	Viacom INC	MTV Networks DE GmbH	Nickelodeon, Nicktoons, Nick (Austria), Nick junior	4	Private	AT, DE
	The Walt Disney Company	The Walt Disney Company	Playhouse Disney DE, Disney Channel DE, Disney XD, Toon Disney	4	Private	AT, DE
Spain	The Walt Disney Company	The Walt Disney Company Iberia S.L.	Disney Channel España, Disney Channel Portugal, Disney XD, Playhouse Disney	4	Private	ES, PT
France	Groupe Canal+ SA	Groupe Canal+ SA	Piwi, Télétoon (2)	3	Private	BE, FR, Africa, Madagascar
	GROUPE AB SA	AB SAustria	Mangas	1	Private	FR, LU
	Lagardère	CANAL J	Canal J, Tiji	2	Private	FR, LU
	Lagardère/ France Televisions	JEUNESSE TV	Gulli FR RU	2	Mixed	FR, LU, LV
	The Walt Disney Company	The Walt Disney Company France SA	Disney XD France, Disney Channel France, Playhouse Disney France	2	Private	BE, FR

Country (1)	Media Group/ Groups	Broadcasting company	Channel (2)	Nb of chan-nels (2)	Statute	Distribution
Italy	Mediaset S.P.A./Time Warner INC	BOING S.P.A.	Boing TV	1	Private	GB, IE, PL
	RAI	RAI - Radiotelevisione Italiana SP	RAI Gulp, RAI Yoyo	2	Public	DE, ES, FR, GB, HU, PT, SI,TR
	Time Warner INC	Turner Entertainment Networks International Ltd	Boomerang Italia, Cartoon Network Italia	2	Private	GB, IE, CZ,
	Viacom INC	Viacom Networks Italia	Nickelodeon Italia, Nick Junior Italia	2	Private	AT, BE, BG, CY, CZ, DE, GR, HR, HU, IT, LT, LV, MT, NL, PL, PT, RO, RU, SI, SK, TR,
	The Walt Disney Company	The Walt Disney Company Italia SPA	Disney Channel Italia, Disney Channel Mobile Italia, Disney in English, Toon Disney Italia, Playhouse Disney Italia	5	Private	BE, CY, DE, ES, FR, GR, HR, HU, LT, LU, MT, PL, PT, RO,RU, SI, SK, TR
Latvia	SIA Voxell Baltic	SIA Voxell Baltic	4 multimania (4)	4	Private	Europe wide (but not Nordic states)
The Nether-lands	Viacom INC	MTV Networks B.V.	Nick Hits, Nicktoons, Nick Junior (2), Nickelodeon (5)	9	Private	DK, EE, ES, FI, FR, GB, GR, IE, NO, PL, PT, SE, TR
	The Walt Disney Company	Jetix Europe Channels B.V.	Disney Channel Nederland, Disney XD	2	Private	BE, EE, FR, GB, GR, HU, IE, PT, RO, RU,
Portugal	Liberty Global	DREAMIA - Serviços de Televisão, S.A.	Canal Panda (2), Panda Biggs TV	3	Private	IT, FR
Sweden	Sveriges Television AB	STV	SVTB	1	Public	IT, LU
Slovakia	Mega Max Media s.r.o	Mega Max Media s.r.o	Duck TV, Duck TV HD	2	Private	IT
Turkey	Türkiye Radyo ve Televizyon Kurumu	TurkeyT	TurkeyT Çocuk	1	Private	IT
United Kingdom	British Broadcasting Corporation	BBC	CBBC, CBeebies (2)	3	Public	IT
	BFTV Ltd	BFTV Ltd	Baby First (6)	6	Private	EE, LT, LV, RU
	CSC Media Group Ltd	CSC Media Group Ltd	Tiny Pop, Pop!, Pop Girl!	3	Private	BE, DK, FI, NL, NO, SE
	Liberty Global	JIMJAM Television Ltd	JimJam (16)	16	Private	BE, NL
	NBC UNIVERSAL	KIDSCO Ltd	Kidsco (12)	12	Private	ES, PT
	News Corporation	Baby Network Ltd	Baby TV (11)	11	Private	DK, FI, NO, SE
	The Walt Disney Company	The Walt Disney Company Ltd	Disney Cinemagic (5), Disney XD (7) Playhouse Disney (5) Disney Channel (8)	25	Private	AT, BE, BG, CY, CZ, DE, EE, HR, HU, LT, LU, MT, NL, PL, RO, SK
	Viacom INC	Nickelodeon International Ltd	Nickelodeon (7), Nickelodeon Junior (3)		Private	FR, TR

Note
As of December 2010

Source: MAVISE database / European Audiovisual Observatory

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OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE

Established in December 1992, the European Audiovisual Observatory is a European public service organisation whose mission is to foster transparency in the European audiovisual sector and provide information services to policy makers and audiovisual professionals.

Its membership consists at present of 37 European states as well as the European Union represented by the European Commission. The Observatory functions within the legal framework of the Council of Europe and operates in collaboration with its information network: partners, correspondents and professional organisations.

The Observatory's principal areas of activity are: film, television, video/DVD, new audiovisual media services and public policy on film and television. It provides information on markets, financing and legal aspects of the audiovisual sector.

Information is made available through print publications, online services, databases and within the framework of conferences and workshops.

Créé en décembre 1992, l'Observatoire européen de l'audiovisuel est un organisme européen de service public dont la mission est d'assurer une plus grande transparence dans le secteur audiovisuel en Europe et de répondre aux besoins en information des organes gouvernementaux ainsi que des professionnels de l'audiovisuel.

Il regroupe actuellement 37 Etats membres ainsi que l'Union européenne représentée par la Commission européenne. L'Observatoire s'inscrit dans le cadre juridique du Conseil de l'Europe et travaille en collaboration avec des organismes partenaires, un réseau de correspondants et des organisations professionnelles du secteur.

Ses principaux champs d'activité concernent le cinéma, la télévision, la vidéo/DVD, les services audiovisuels des nouveaux médias et les politiques publiques relatives au cinéma et à la télévision. L'Observatoire fournit des services d'information sur les marchés, les financements et le cadre juridique du secteur audiovisuel.

Les informations sont disponibles sous forme de publications, de services en ligne, de bases de données ou dans le cadre de conférences ou d'ateliers.

Die im Dezember 1992 gegründete Europäische Audiovisuelle Informationsstelle ist eine europäische Einrichtung des öffentlichen Rechts. Ihr Auftrag besteht in der Schaffung von Transparenz im europäischen audiovisuellen Sektor durch die Bereitstellung von Informationsdienstleistungen für die audiovisuelle Fachwelt.

37 europäische Staaten sowie die Europäische Union vertreten durch die Europäische Kommission sind zur Zeit Mitglieder der Informationsstelle Die Informationsstelle erfüllt ihre Aufgabe im rechtlichen Rahmen des Europarates und arbeitet in engem Verbund mit Partnerorgani sationen, Korrespondenten und Berufsfachverbänden.

Die Informationsstelle hat die Kernarbeitsfelder: Film, Fernsehen, Video/DVD, neue audiovisuelle Mediendienste und staatliche Maßnahmen für Film und Fernsehen. Sie stellt Informationen über Märkte sowie Finanzierung und juristische Aspekte des audiovisuellen Sektors bereit.

Die Arbeitsergebnisse stehen in Form von Printpublikationen, Online-Diensten und Datenbanken zur Verfügung und werden im Rahmen von Konferenzen und Workshops vorgestellt.

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