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Introduction and methodology

This report compiles data available at the European Audiovisual Observatory on the production and exploitation in cinemas and in VOD of animation films and audiovisual content produced in Europe. The data is based on the following sources:

- The Observatory LUMIERE database. LUMIERE tracks the admissions of films released in Europe and in 12 major non-European markets. LUMIERE was also used as a proxy to identify the number of films produced in Europe, with one limit: LUMIERE only includes films released in at least one of the covered countries; therefore films that were produced but not released are not considered.

- The LUMIEREVOD database. LUMIEREVOD tracks the composition of films and TV content in over 500 European VOD catalogues.

- In both cases, identifying animation programmes can face limits, in particular when they combine animation and live action. We have used a variety of sources (mainly LUMIERE and IMDb) to establish whether a given programme could be considered as animation.

This report also provides new data regarding the production of animation TV content. This data faces a series of methodological limits, which are detailed in slide 14. However, the Observatory hopes that these figures represent a useful first step to bring more transparency to the sector.

Please quote this report as “The visibility of audiovisual works in TVOD – 2020 edition”, European Audiovisual Observatory. If you wish to reproduce tables or graphs contained in this publication please contact the European Audiovisual Observatory for prior approval. Opinions expressed in this publication are personal and do not necessarily represent the view of the European Audiovisual Observatory, its members or the Council of Europe.
Introduction and methodology

The data collected for this report depicts a series of characteristics of the European animation sector.

- A stable theatrical film segment with individual films performing well in terms of exports in cinemas (in particular thanks to a high share of coproductions) and on video-on-demand (VOD), but comparatively limited in terms of number of films produced and hence a comparatively low share of admissions or presence in VOD catalogues.

- A TV (and subscription video-on-demand [SVOD]) animation segment which seems to be gaining momentum since 2017/2018 and which shares some characteristics with the animation film segment: high share of coproductions and better circulation than live action fiction.

- The growth in TV animation production is likely partly driven by web-only animation TV series, primarily on YouTube and other video sharing platforms. The high share of animation programmes on SVOD catalogues will likely drive more demand for European animation TV series but, as of 2019, it probably had a marginal impact on the production volume.

- Looking at the various indicators presented in this report conveys the impression of a shortage of European animation film and TV content. The recent growth in the production of TV content (and the more qualitative sense of a high number of projects in development) may resolve the gap in the coming years, at least as regards TV animation content.

- Finally, the European animation production sector appears to be led by France in terms of production volume and by the United Kingdom in terms of theatrical and VOD exploitation.
The production and theatrical exploitation of animation films
Europe produces around 55 theatrical animation films per year. France, Russia and Germany are the main producing countries.

Theatrical animation films are significantly more often international co-production than films of all categories.

Exports are much more important for the theatrical exploitation of animation films than for films of all categories.

The United Kingdom, France and Russia get the highest share of admissions to European animation films.

The top 20 European animation films account for 60% of all admissions to European animation films.

In Europe, European animation films get a lower market share than films of all categories.

China is the first non-European market for European animation films.
On average, 55 theatrical animation films produced in Europe each year

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

France and Russia are the two main producers of theatrical animation films.

Number of animation films produced in Europe

- 2015: 45
- 2016: 44
- 2017: 49
- 2018: 84
- 2019: 53
- Av 2015-2019: 55
- 2020: 36

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

- FR: 8.8
- RU: 7.0
- DE: 6.0
- GB: 4.8
- ES: 4.4
- CL: 4.0
- TR: 3.2
- NO: 2.0
- BE: 1.8
- SE: 1.6
- DK: 1.4
- NL: 1.4
- IT: 1.4
- Others: 7.2

Source: European Audiovisual Observatory
More coproductions in theatrical animation films

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

Source: European Audiovisual Observatory
Worldwide admissions to European animation films: the importance of exports

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

Breakdown of worldwide admissions to European animation films (average 2015-2019)
Total: 52 m admissions

Exports: 67% of admissions


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

[1] Mixed live action and animation

Source: European Audiovisual Observatory
Worldwide admissions to European animation films: the UK leads

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

### Worldwide admissions to European films by country of origin (average 2015-2019)

<table>
<thead>
<tr>
<th>Country</th>
<th>Admissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>GB</td>
<td>13.3</td>
</tr>
<tr>
<td>FR</td>
<td>11.5</td>
</tr>
<tr>
<td>RU</td>
<td>8.3</td>
</tr>
<tr>
<td>DE</td>
<td>5.4</td>
</tr>
<tr>
<td>BE</td>
<td>4.5</td>
</tr>
<tr>
<td>ES</td>
<td>2.6</td>
</tr>
<tr>
<td>PL</td>
<td>1.2</td>
</tr>
<tr>
<td>TR</td>
<td>1.2</td>
</tr>
<tr>
<td>Others</td>
<td>3.8</td>
</tr>
</tbody>
</table>

### Concentration of worldwide admissions to European animation films (2015-2019)

- Top 20: 60%
- 21 to 100: 34%
- All others: 6%

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

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

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

Admissions to European animation films in Europe (2015-2020)

Market shares of admissions to animation films in Europe (2015-2020)

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

Source: European Audiovisual Observatory

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

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

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

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

Source: European Audiovisual Observatory

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

Source: European Audiovisual Observatory
The production of animation TV content
The identification of animation TV content produced in Europe relied on a variety of sources:

- A dataset provided by Plurimedia/The European Metadata Group, based on the analysis of the schedule of a sample of TV channels and SVOD services.
- An extract of all European animation TV programmes from IMDb public data.
- A review of the catalogues of large producers and distributors on TV animation.

Intensive additional desk research was made to check/obtain the number of seasons, the number of episodes and the run time of programmes.

There are limits to this methodology:

- Some countries are not well represented in the sources we have used.
- Animation programmes are often packages inside “children programming” blocks, and therefore cannot be identified individually.
- Programmes made specifically for video sharing platforms such as YouTube are complicated to spot.
- The methodology combines different approaches to the “year of production”, which may have led to double counts.

We therefore believe that these figures give a correct order of magnitude of the production of TV animation in Europe but should be taken with care. For the sake of transparency, we provide in a separate annex to this report the full list of animation programmes that we have identified for the 2015-2019 time period. We welcome any feedback on missing programmes.
Gathering data on the production of TV animation in Europe faces methodological limits. The figures presented in this section should be considered as order of magnitudes and as a contribution of the European Audiovisual Observatory to a better understanding of the sector.

The Observatory estimates the annual volume of the production of TV animation in Europe at about 220 titles (TV movie or TV series season), 5200 episodes and 830 hours.

The sector seems to be experiencing a growth since 2017/2018 as regards the volume of hours commissioned, which translated into an increase of hours broadcast in 2019.

The sector shows a large variety of formats in terms of number of episodes per season and of duration of episodes.

France and the United Kingdom are by far the main producers of animation TV content.

European TV animation coproductions account for 36% of all TV animation hours produced, a much higher share than for live TV fiction.
About 830 hours of European TV animation produced each year

### Indicators suggest that the production of TV animation in Europe has been increasing.

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

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

<table>
<thead>
<tr>
<th>Titles</th>
<th>Episodes</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>219</td>
<td>5166</td>
<td>829</td>
</tr>
</tbody>
</table>

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

- **Note**: 1 title = 1 TV movie or one TV series season
- **Source**: European Audiovisual Observatory
A large diversity in terms of number of episodes per season...

The main format of TV animation is series with 2 to 13 episodes.

But TV series with more than 26 episodes per season account for 57% of hours produced.

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

Note: 1 title = 1 TV movie or one TV series season
Source: European Audiovisual Observatory
... and in terms of duration of episodes

Short formats (episodes with less than 10 minutes) account for the majority of titles and episodes produced.

But, in terms of hours produced, the production volume is split between 3 main clusters: episodes of less than 10 minutes, episodes from 11’ to 20’ and episodes of more than 30’.

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

Source: European Audiovisual Observatory
Several countries are likely to be underrepresented in the sources used for this report. However, in terms of hours produced, the TV animation production landscape seems to be dominated by France (about 300 hours produced each year) and the United Kingdom (230 hours).

- Germany, Spain and Italy come next, with a similar volume of production (about 55 hours each year).
- Beyond the top 5, Russia (whose production volume is probably underestimated in our data) and Ireland would follow with about 30 hours each year.

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

- France: 35%
- United Kingdom: 26%
- Germany: 7%
- Spain: 7%
- Italy: 6%
- Others: 19%

Source: European Audiovisual Observatory
European TV animation coproductions account for 36% of all TV animation hours produced.

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

**Share of coproductions in TV animation (av. 2015-2019)**

- Titles: 21%
- Episodes: 28%
- Hours: 36%

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

Source: European Audiovisual Observatory
Animation films and TV content in VOD catalogues
Key findings

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

**The weight of animation in catalogues is significantly higher for TV content in SVOD (22%)**
- The total share of animation content in VOD and SVOD is leveled-out as catalogues include much more films than TV seasons.

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

- Animation (Film) in SVOD: 6%
- Animation (Film) in TVOD: 7%
- Animation (Film) in SVOD+TVOD: 7%
- Animation (TV) in SVOD: 22%
- Animation (TV) in TVOD: 14%
- Animation (TV) in SVOD+TVOD: 20%
- Animation (Film + TV) in SVOD: 10%
- Animation (Film + TV) in TVOD: 7%
- Animation (Film + TV) in SVOD+TVOD: 8%

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

*Source: European Audiovisual Observatory*
The USA are the main provider of animation films...

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

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

The top 5 providers of animation films in VOD catalogues:

- ANIMATION FILM
  - US: 63%
  - DE: 52%
  - GB: 27%
  - FR: 17%
  - JP: 17%

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

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

Source: European Audiovisual Observatory
The share of US animation TV content in VOD catalogues is similar to their share of all categories of TV content.

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

The top 5 providers of animation TV content in VOD catalogues:

- US: 51%
- GB: 9%
- JP: 15%
- CA: 6%
- FR: 7%

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

- GB: 28%
- FR: 28%
- DE: 13%
- DK: 8%
- IT: 3% (3%)
- ES: 3% (3%)
- IE: 5%
- FI: 2%
- BE: 1%
- NL: 1%
- Others: 6%

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

Source: European Audiovisual Observatory
European animation works account for 21% of all animation works vs. a share of 33% for all categories of works.

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

**Share of European titles among animation titles**

**All VOD (SVOD+TVOD)**

<table>
<thead>
<tr>
<th>Format</th>
<th>All programmes</th>
<th>Animation programmes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Film</td>
<td>33%</td>
<td>20%</td>
</tr>
<tr>
<td>TV content</td>
<td>32%</td>
<td>28%</td>
</tr>
<tr>
<td>Film + TV content</td>
<td>33%</td>
<td>21%</td>
</tr>
</tbody>
</table>

**SVOD**

<table>
<thead>
<tr>
<th>Format</th>
<th>All programmes</th>
<th>Animation programmes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Film</td>
<td>37%</td>
<td>26%</td>
</tr>
<tr>
<td>TV content</td>
<td>31%</td>
<td>24%</td>
</tr>
<tr>
<td>Film + TV content</td>
<td>36%</td>
<td>25%</td>
</tr>
</tbody>
</table>

**TVOD**

<table>
<thead>
<tr>
<th>Format</th>
<th>All programmes</th>
<th>Animation programmes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Film</td>
<td>31%</td>
<td>20%</td>
</tr>
<tr>
<td>TV content</td>
<td>34%</td>
<td>28%</td>
</tr>
<tr>
<td>Film + TV content</td>
<td>31%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Source: European Audiovisual Observatory
The share of European “unique” animation films is lower than the European share of all categories of films

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

### Share of European unique films for animation films and all films

<table>
<thead>
<tr>
<th></th>
<th>All European films</th>
<th>European animation films</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share of unique films</td>
<td>44%</td>
<td>34%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Origin</th>
<th>All animation film</th>
<th>Animation films 2016 and later</th>
</tr>
</thead>
<tbody>
<tr>
<td>European origin</td>
<td>34%</td>
<td>34%</td>
</tr>
<tr>
<td>US origin</td>
<td>39%</td>
<td>33%</td>
</tr>
<tr>
<td>Other origin</td>
<td>27%</td>
<td>33%</td>
</tr>
</tbody>
</table>

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

*Source: European Audiovisual Observatory*
A lower share of unique titles combines with a lower circulation in terms of number of services or countries

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

**Average number of services of presence per film and per origin**

<table>
<thead>
<tr>
<th>Origin</th>
<th>All films</th>
<th>Animation films</th>
</tr>
</thead>
<tbody>
<tr>
<td>European</td>
<td>9,0</td>
<td>13,7</td>
</tr>
<tr>
<td>US</td>
<td>17,2</td>
<td>35,4</td>
</tr>
<tr>
<td>Other</td>
<td>8,2</td>
<td>12,1</td>
</tr>
<tr>
<td>All</td>
<td>11,8</td>
<td>21,7</td>
</tr>
</tbody>
</table>

**Average number of countries of presence per film and per origin**

<table>
<thead>
<tr>
<th>Origin</th>
<th>All films</th>
<th>Animation films</th>
</tr>
</thead>
<tbody>
<tr>
<td>European</td>
<td>4,8</td>
<td>5,4</td>
</tr>
<tr>
<td>US</td>
<td>8,0</td>
<td>10,8</td>
</tr>
<tr>
<td>Other</td>
<td>6,2</td>
<td>6,2</td>
</tr>
<tr>
<td>All</td>
<td>6,2</td>
<td>7,5</td>
</tr>
</tbody>
</table>

Source: European Audiovisual Observatory
The share of European “unique” animation TV content is lower than the European share of all categories of TV content. The gap is increasing when considering the most recent TV content (TV series with season 1 produced in 2016 or later).

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

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

Source: European Audiovisual Observatory

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

Source: European Audiovisual Observatory
Unlike films, European animation TV content circulates as well as animation TV content on average

- TV content from all origin circulates less than films, both in terms of services and countries of presence. This applies in particular to animation TV content. Reasons include that many TVOD services do not propose any TV content.

- European animation TV content circulates much better than European TV content of all categories. The increase is driven both by a presence in more countries and the presence in more services in a given country.

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

<table>
<thead>
<tr>
<th>Origin</th>
<th>All TV</th>
<th>Animation TV</th>
</tr>
</thead>
<tbody>
<tr>
<td>European origin</td>
<td>4.0</td>
<td>7.4</td>
</tr>
<tr>
<td>US origin</td>
<td>8.5</td>
<td>10.9</td>
</tr>
<tr>
<td>Other origin</td>
<td>4.0</td>
<td>5.4</td>
</tr>
<tr>
<td>All origin</td>
<td>5.7</td>
<td>8.0</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Origin</th>
<th>All TV</th>
<th>Animation TV</th>
</tr>
</thead>
<tbody>
<tr>
<td>European origin</td>
<td>3.6</td>
<td>4.7</td>
</tr>
<tr>
<td>US origin</td>
<td>7.7</td>
<td>7.5</td>
</tr>
<tr>
<td>Other origin</td>
<td>3.0</td>
<td>2.8</td>
</tr>
<tr>
<td>All origin</td>
<td>4.9</td>
<td>4.7</td>
</tr>
</tbody>
</table>

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

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

### Average number of seasons per animation series and per origin

<table>
<thead>
<tr>
<th></th>
<th>Europe</th>
<th>US</th>
<th>Other</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average number of seasons per series</td>
<td>2.0</td>
<td>2.4</td>
<td>1.5</td>
<td>1.9</td>
</tr>
</tbody>
</table>

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

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

More information:
www.obs.coe.int
Gilles.Fontaine@coe.int