



# Theatrical Circulation of European Children's Fiction Films

**Facts & Figures**

**2004-2013**

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



## IMPORTANT NOTE:

This presentation was created to support a verbal key note speech at the KIDS Regio Forum and not as a self-explanatory document.

For a contextual analysis, please refer to the report  
*The Theatrical Circulation of European Children's Films*  
which can be obtained under [www.obs.coe.int/shop](http://www.obs.coe.int/shop)

# Sample analysis

Produced  
AND  
Released  
between  
2004 - 2013

# Market volume for children's film

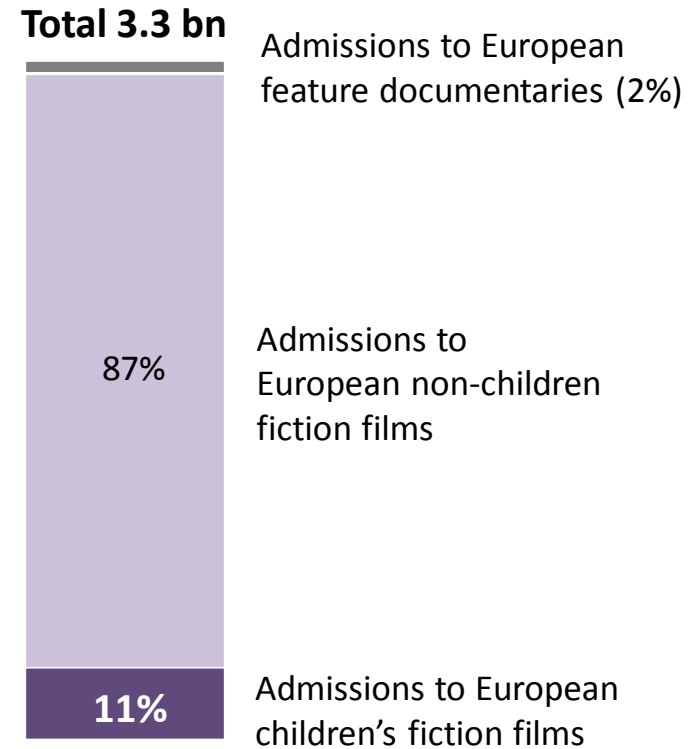
# 648 European children's films sold 373 million tickets ...

Source: OBS



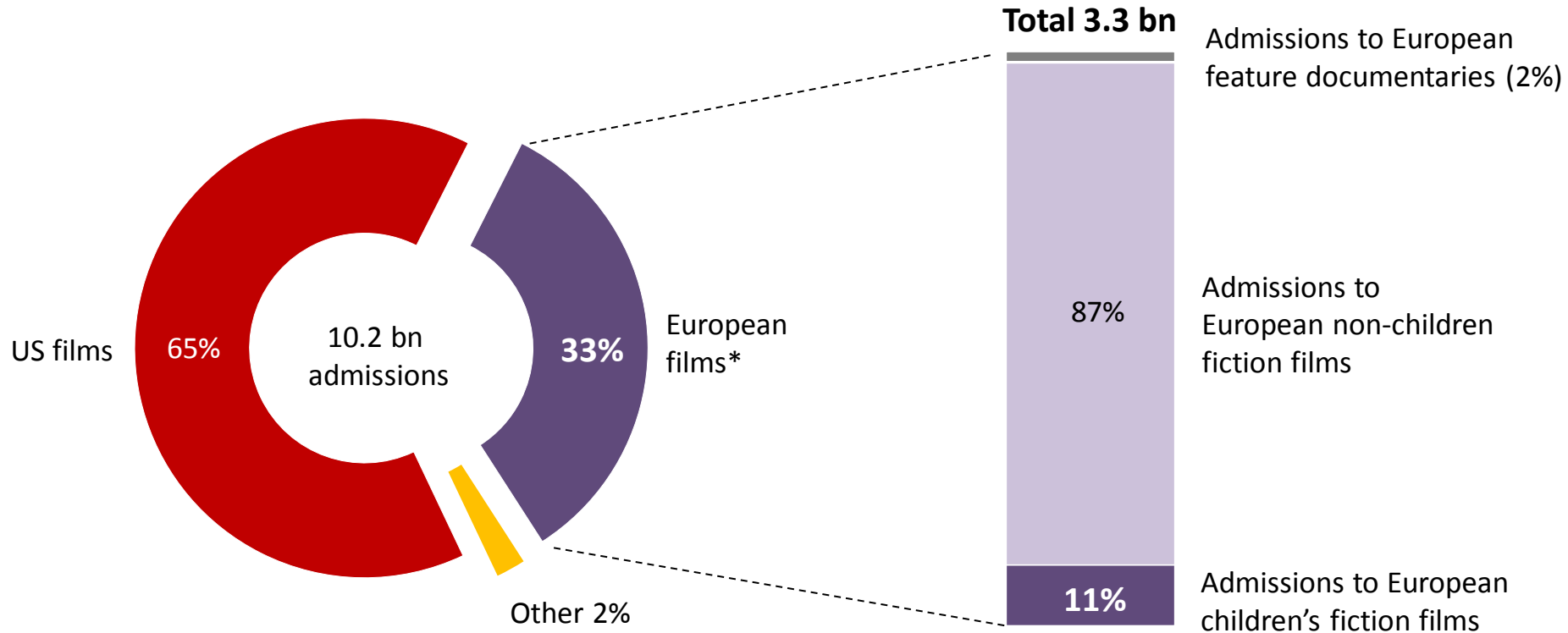
# ... at least 1 in 10 “European” tickets goes to a children’s film

Source: OBS



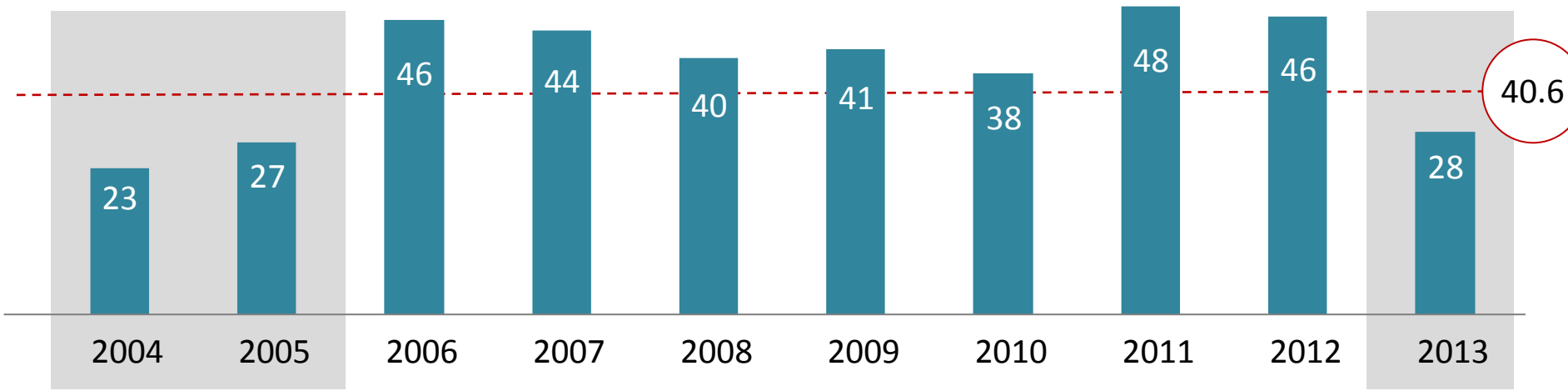
# ... European films in turn have a market share or 33%

Source: OBS



- Includes films produced in Europe with incoming investment from the US ("EUR inc"), e.g. *Inkheart*. "EUR inc" films accounted for 5.7% of total admissions while 'independent' European films took 27.8% of the market.

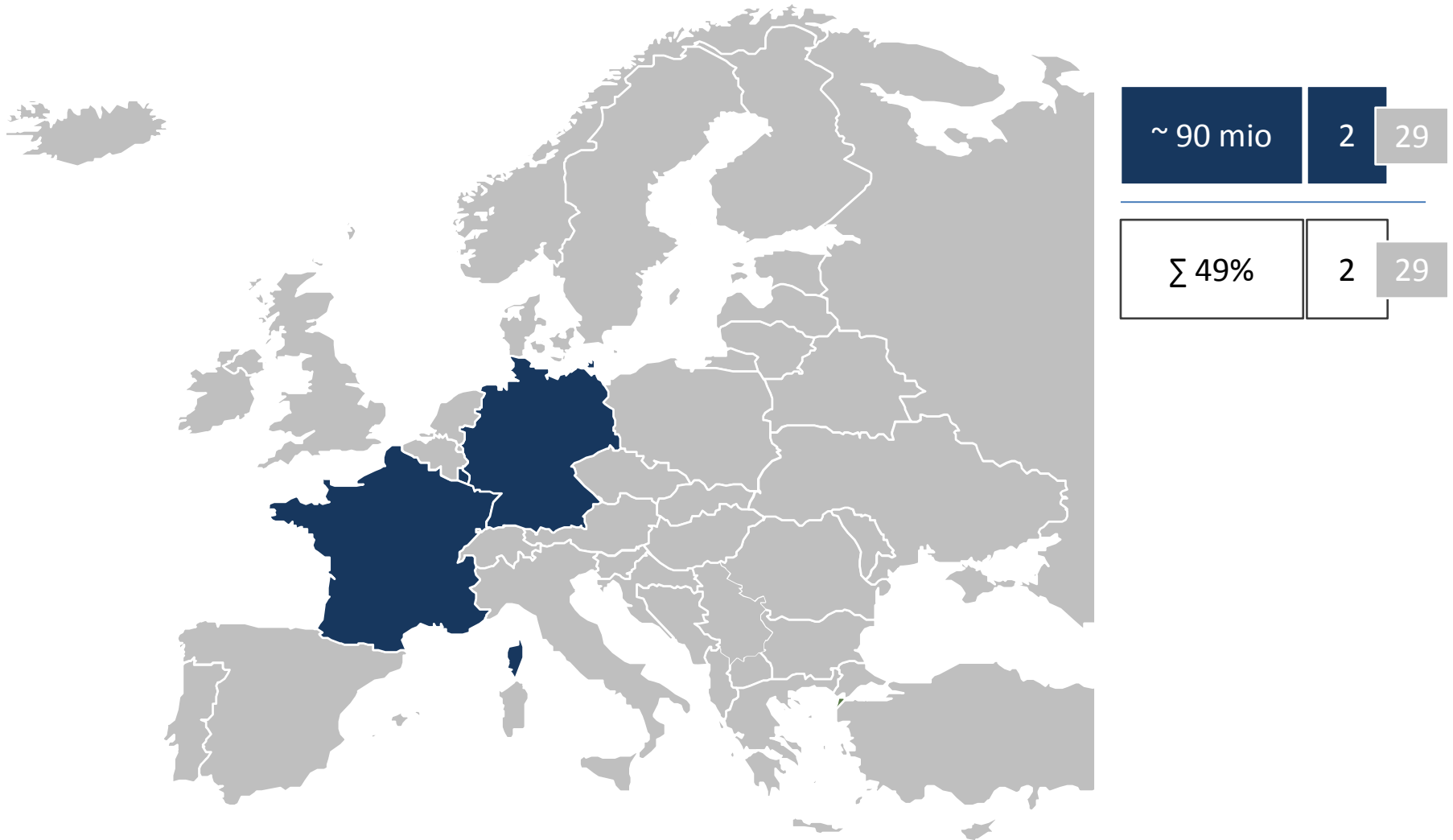




Which markets  
registered the highest admissions  
to children's films?

# Germany and France accounted for almost 50% of total admissions

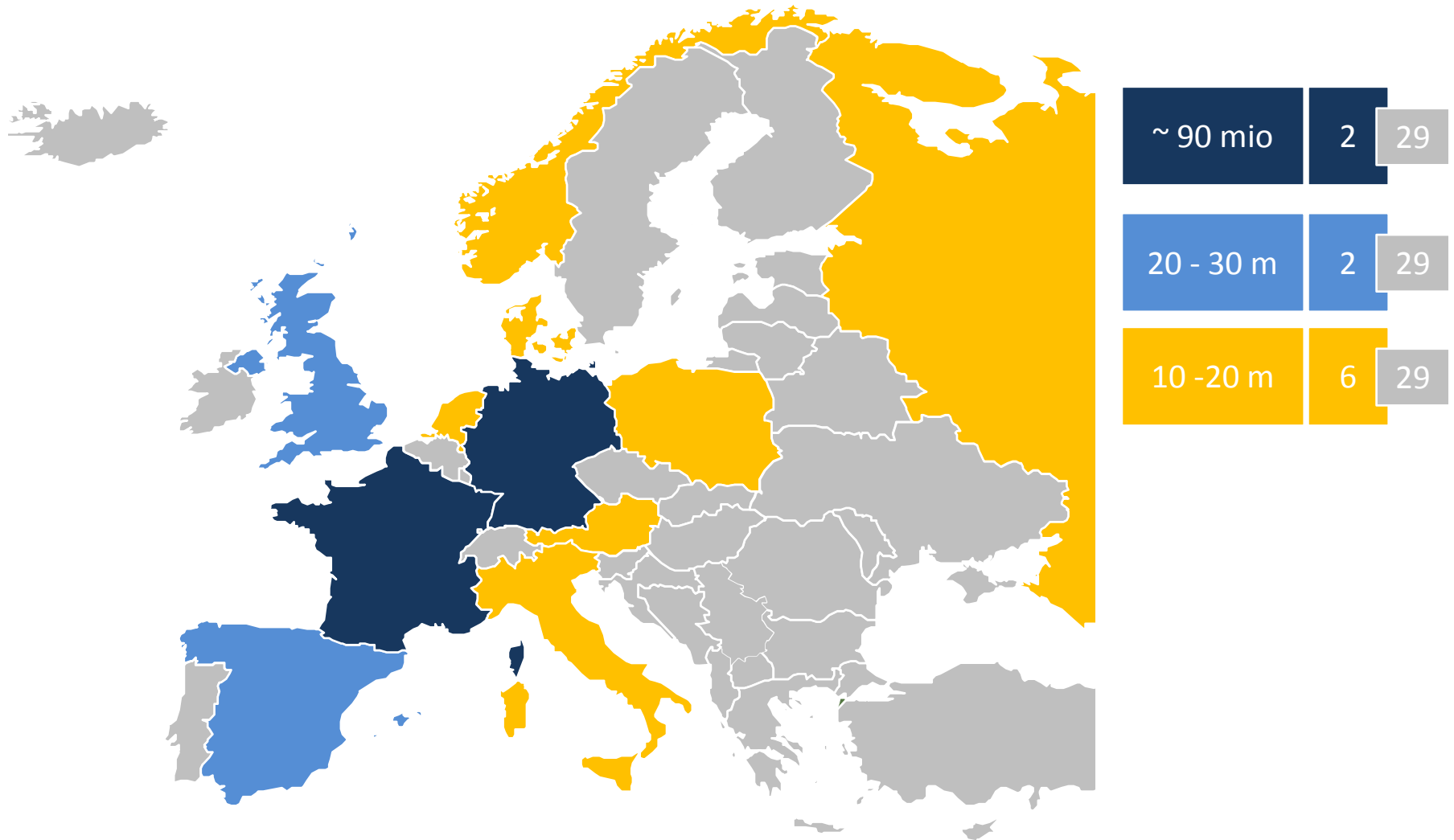
Source: OBS



Note: Coverage rates for RU, GR, LU, IS, LT vary significantly over the time period covered.

# ... followed by the UK and Spain

Source: OBS

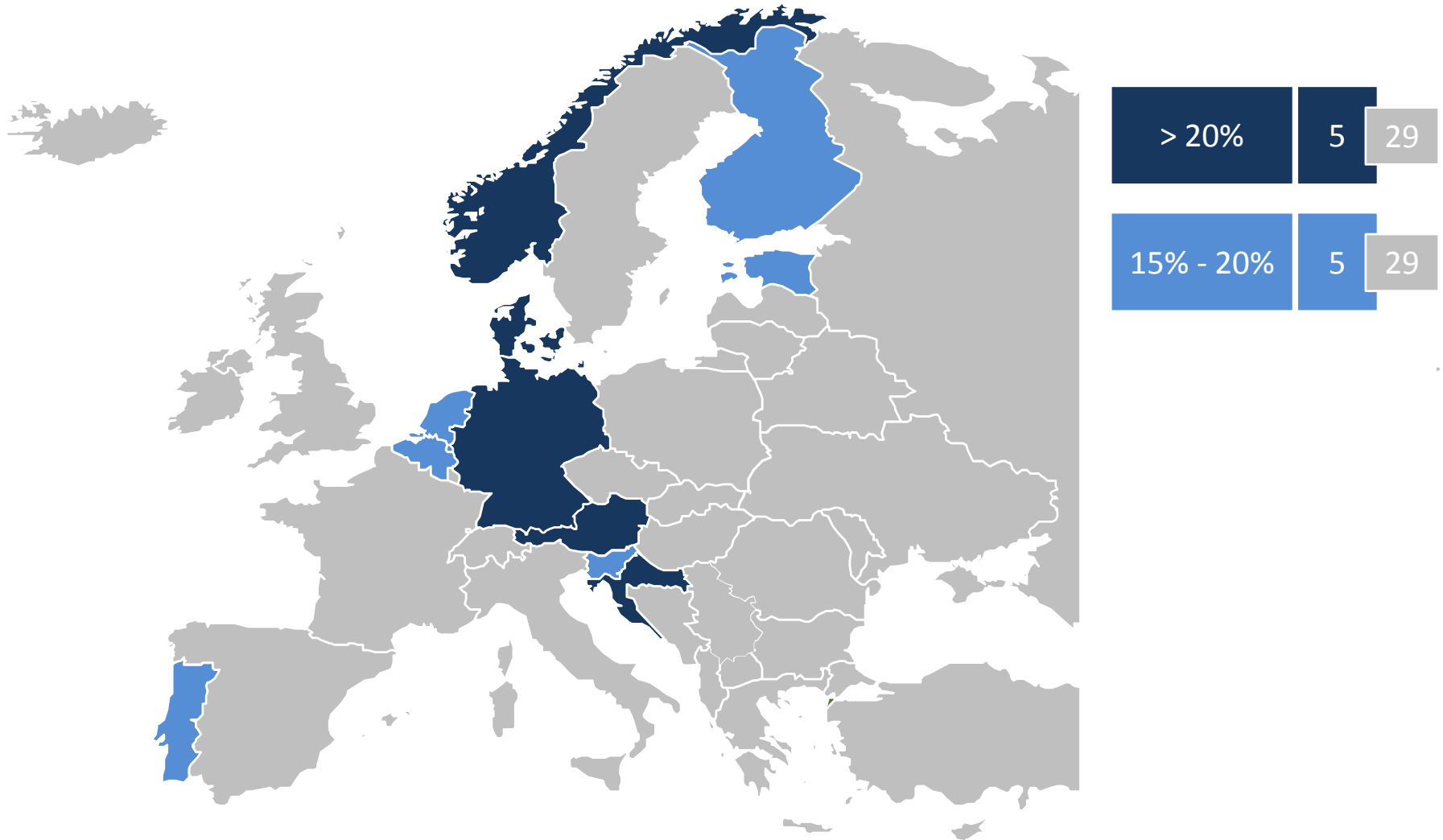


Note: Coverage rates for RU, GR, LU, IS, LT vary significantly over the time period covered.

In which markets  
were children's films particularly  
popular?

# Markets where children's films accounted for more than 15% ... ... of total admissions to European fiction films

Source: OBS

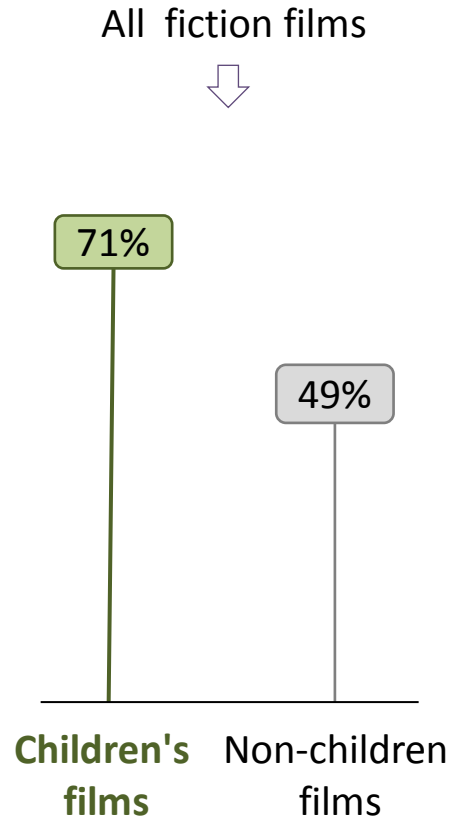


Note: Only takes into account countries with at least 5 children's films released on non-national markets

**More children's films  
get a non-national release**

# Export rate: 71% of children's fiction films had non-national release

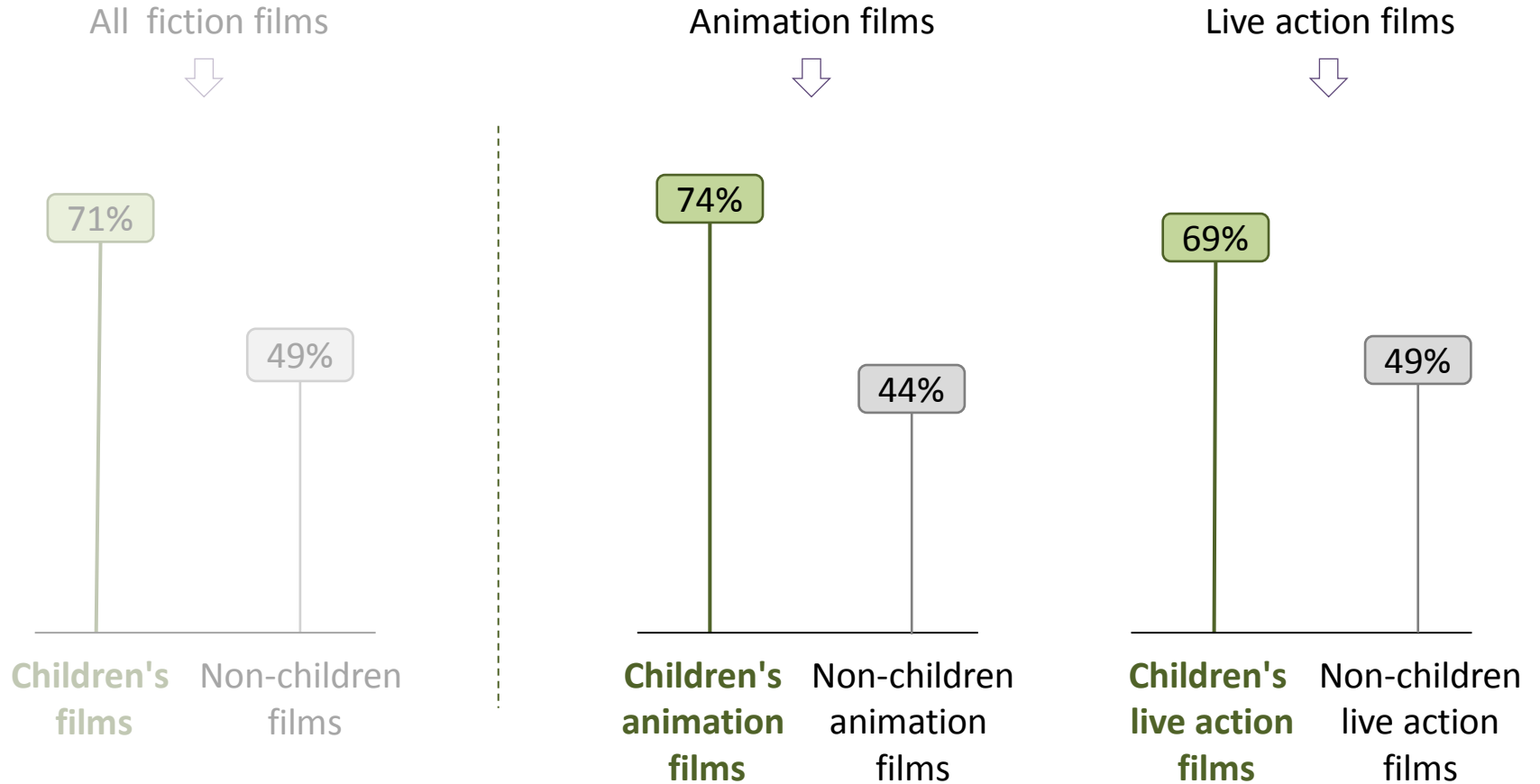
Source: OBS





# ... no significant differences between animation and live action

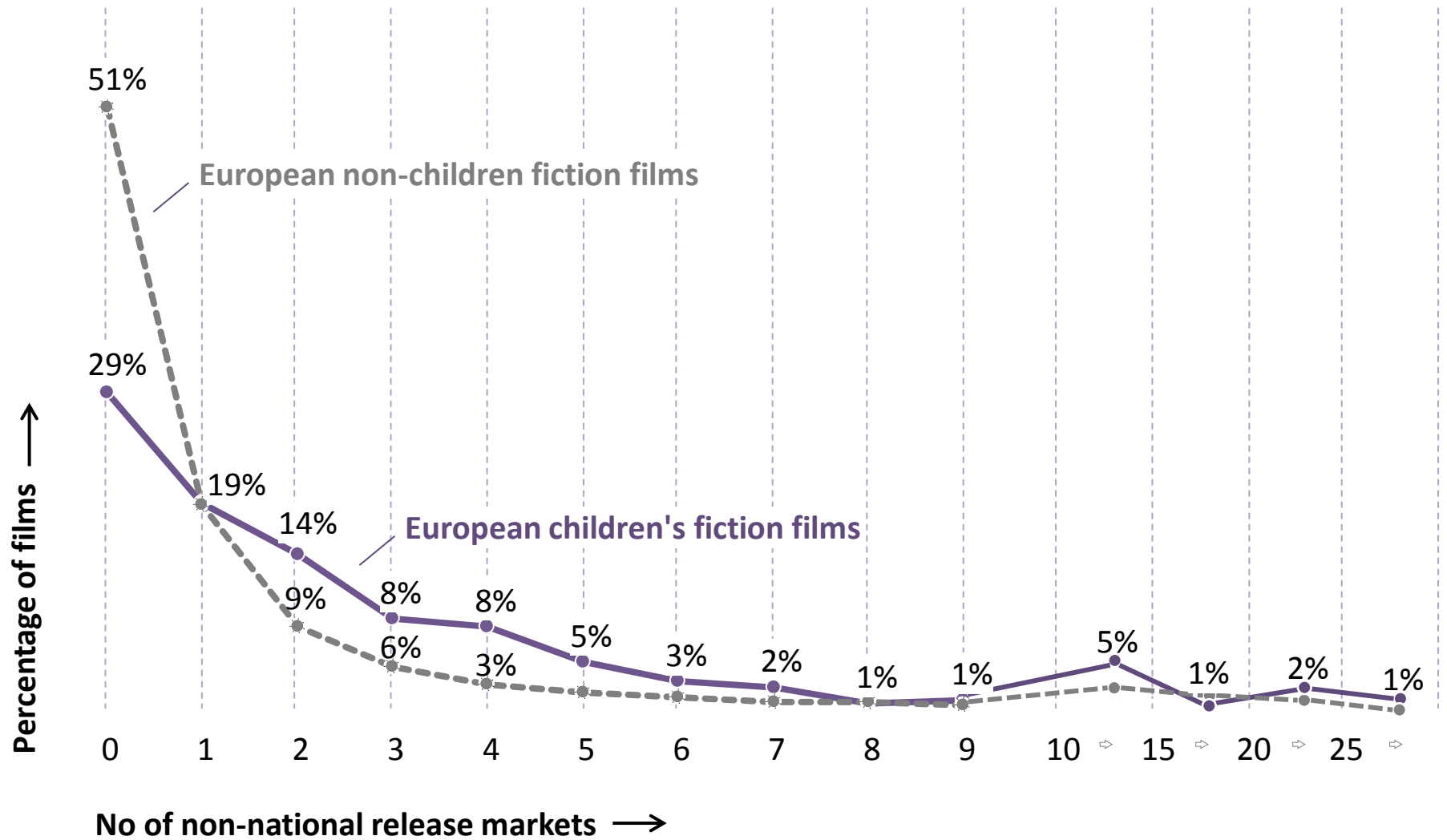
Source: OBS



Children's films  
get released on more  
non-national markets

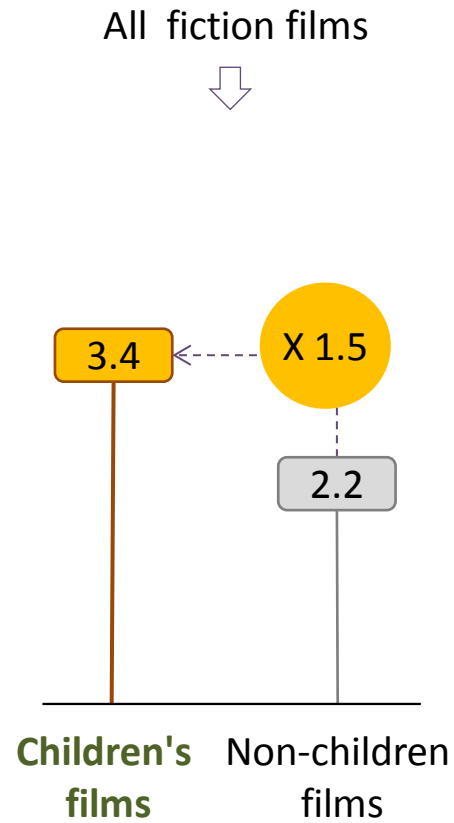
# European fiction films by number of non-national release markets

Source: OBS



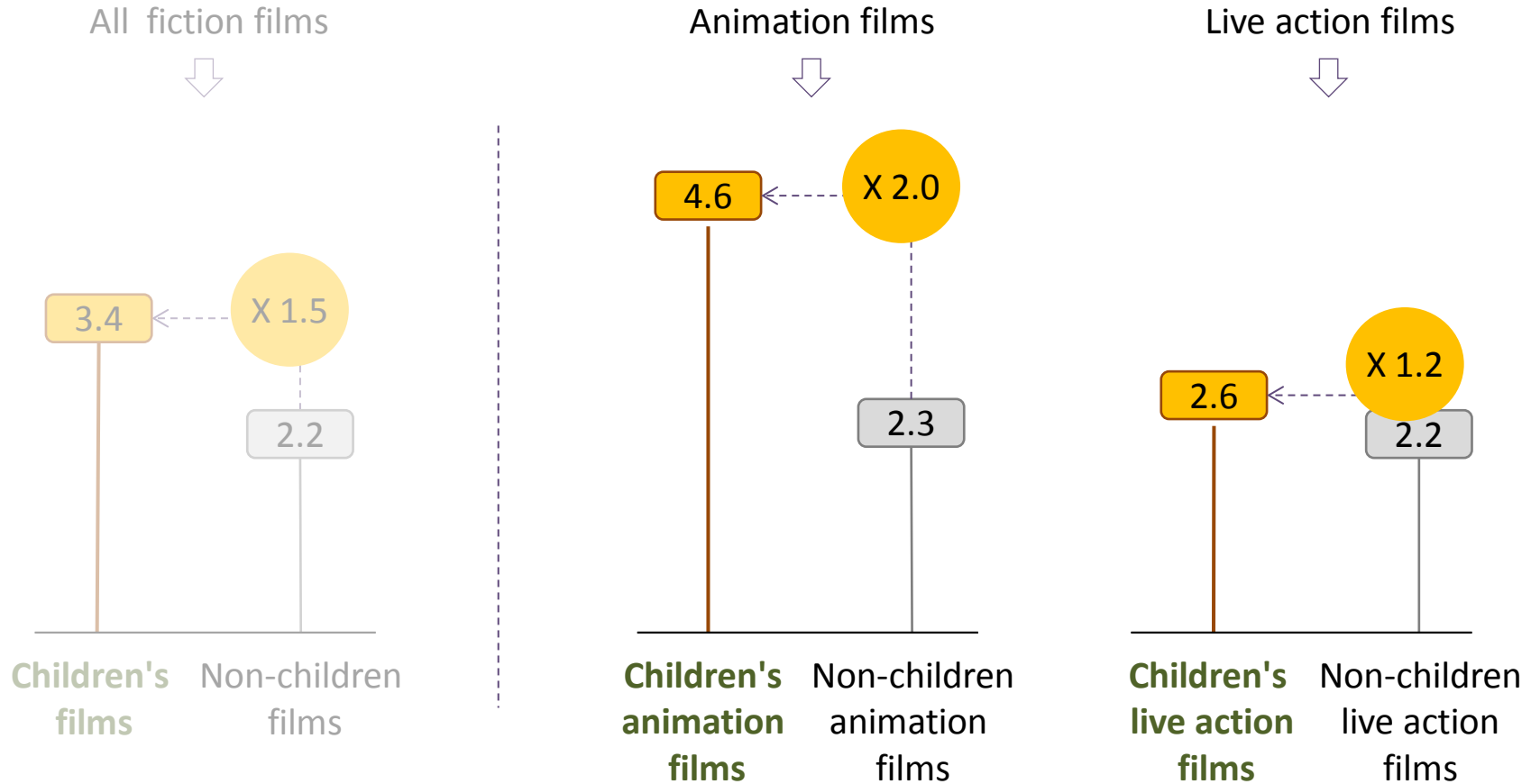
# Children's films get released on 3.4 non-national markets on average

Source: OBS



# ... children's animation films even on 4.6 non-national markets

Source: OBS

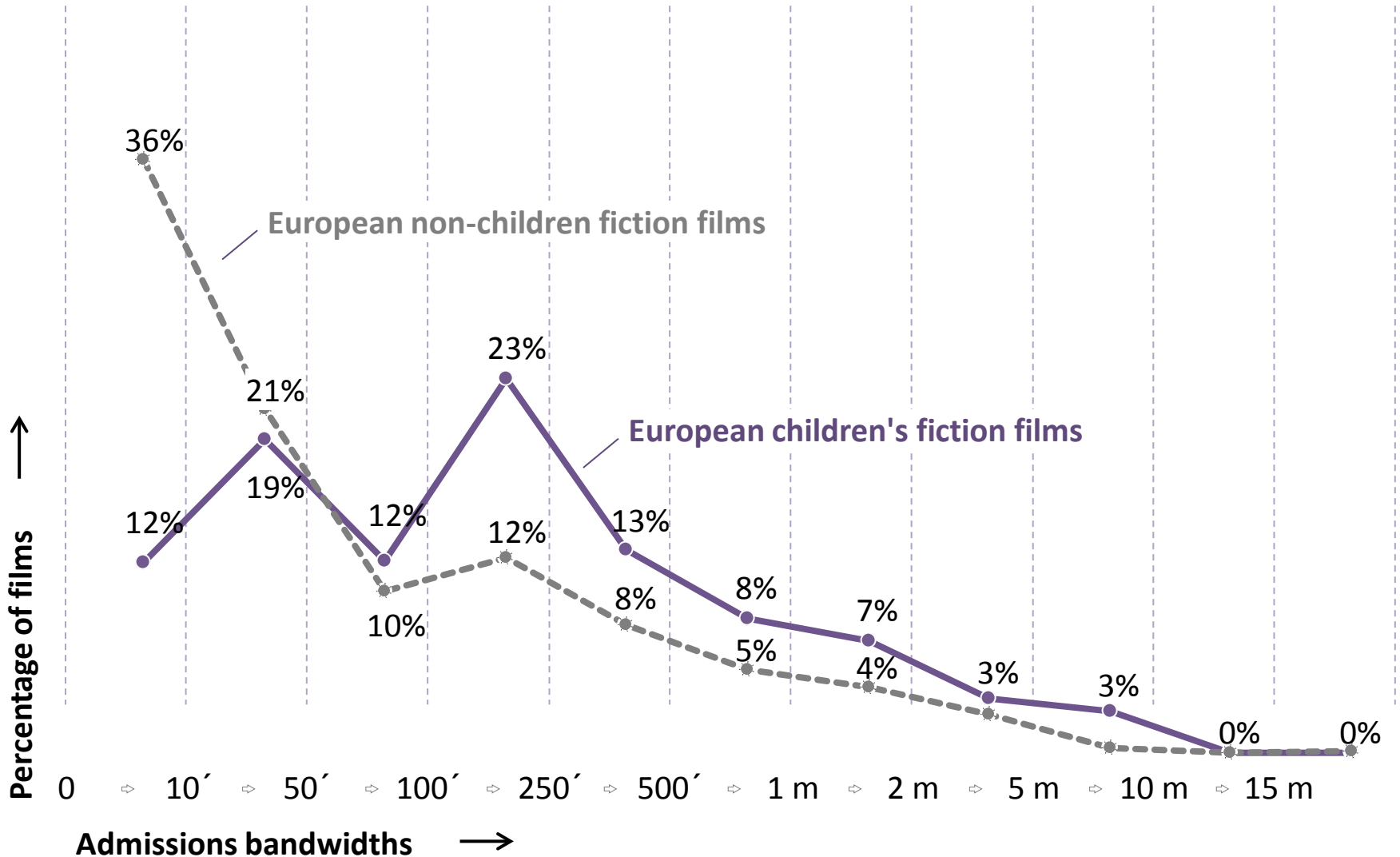


Children's films  
perform better

...

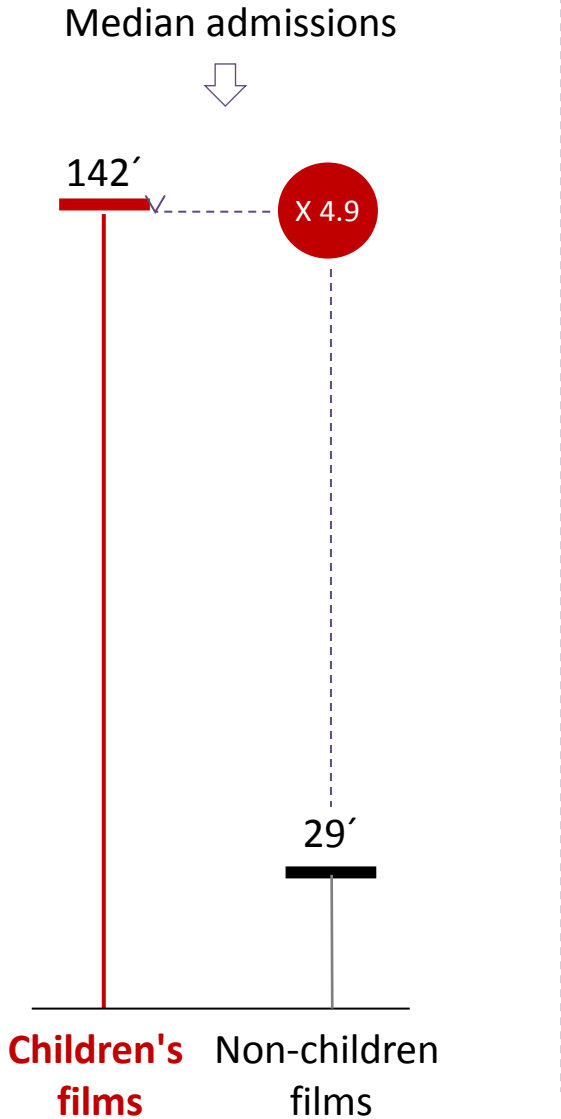
# European fiction films by admissions bandwidths

Source: OBS



# The “average” children’s film sells 5x as many tickets ...

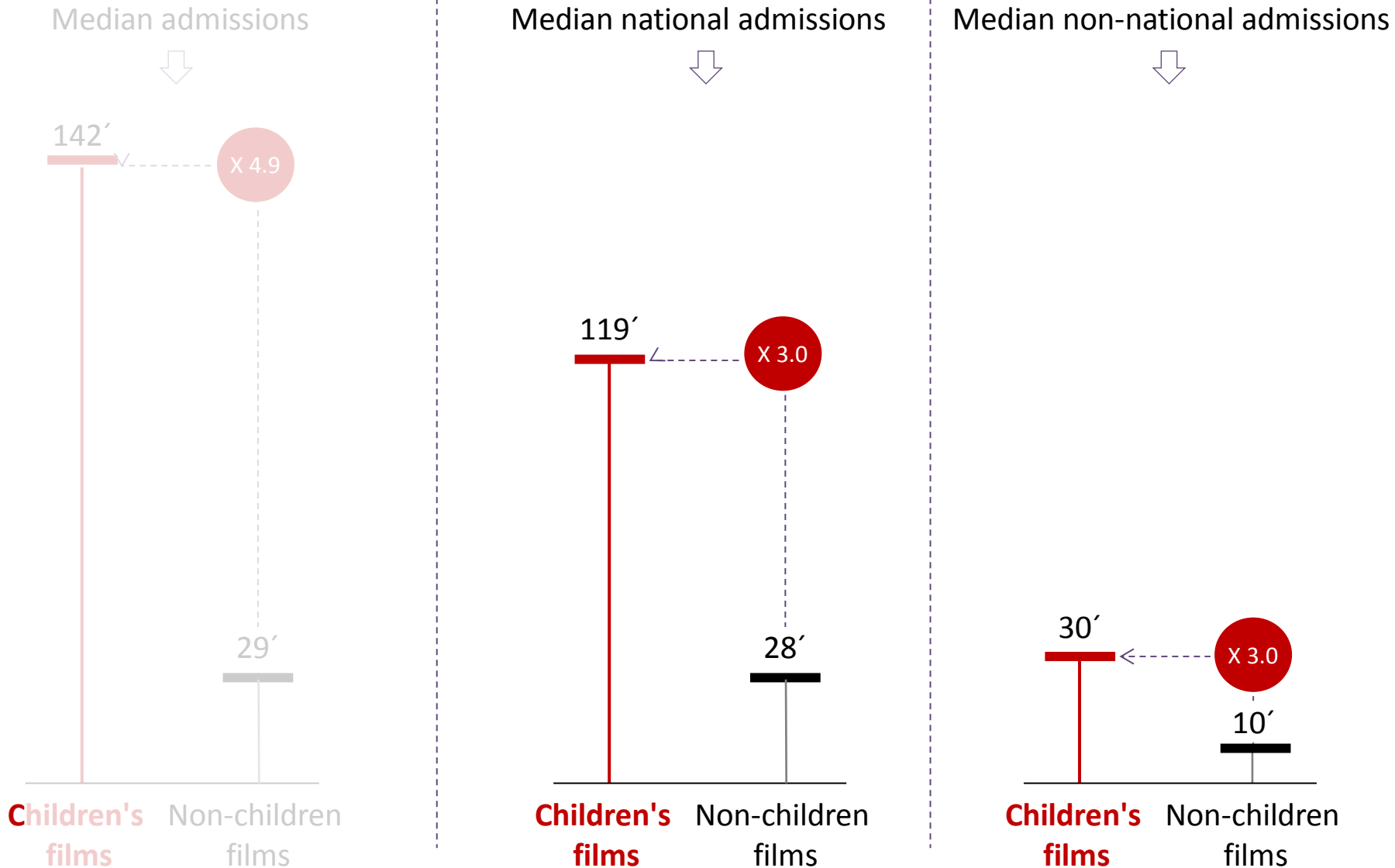
Source: OBS





# ... 3 x as many on the domestic as well as on non-national markets

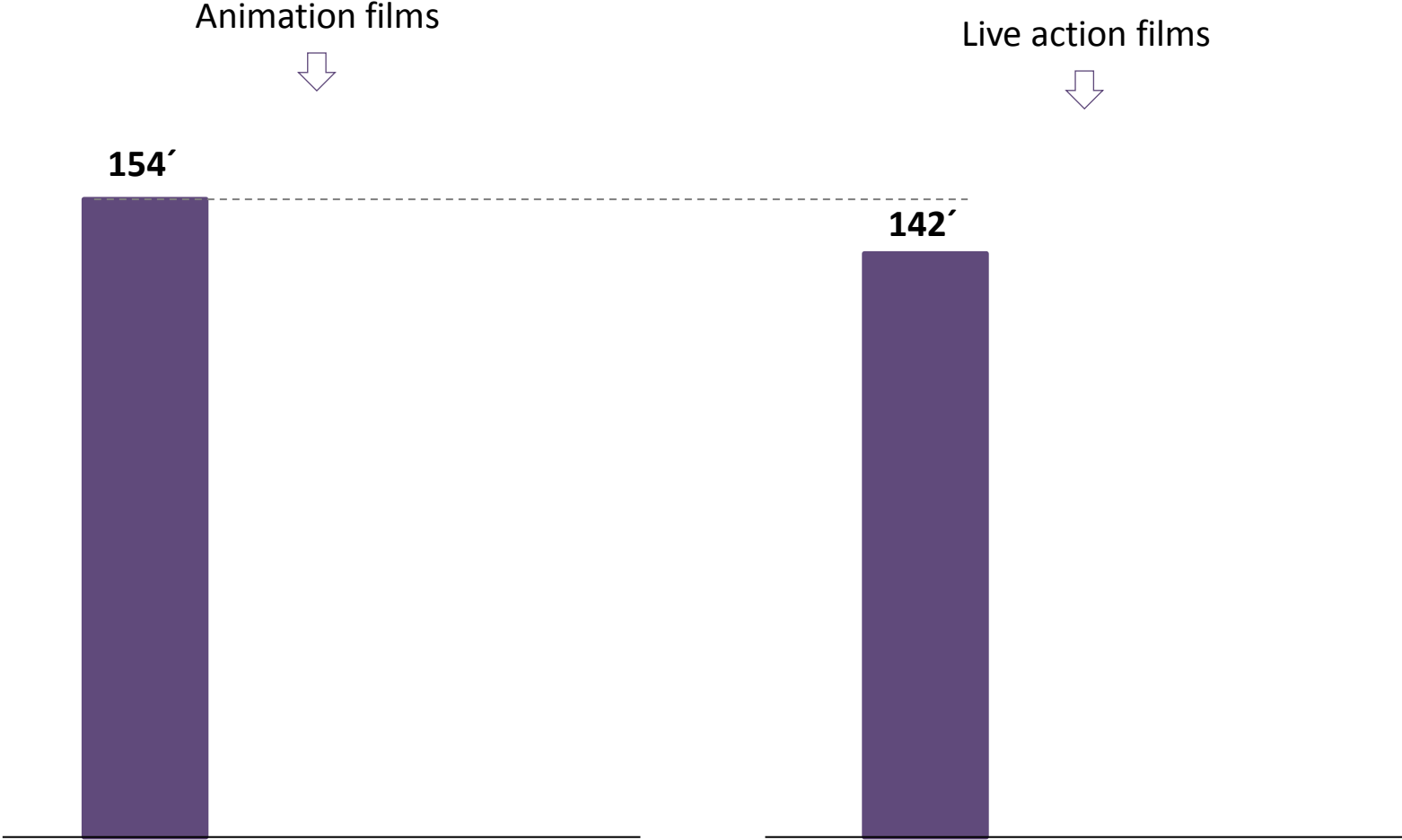
Source: OBS



**Differences between  
children's animation  
and live action films?**

# Animation and live action films generate comparable median admissions

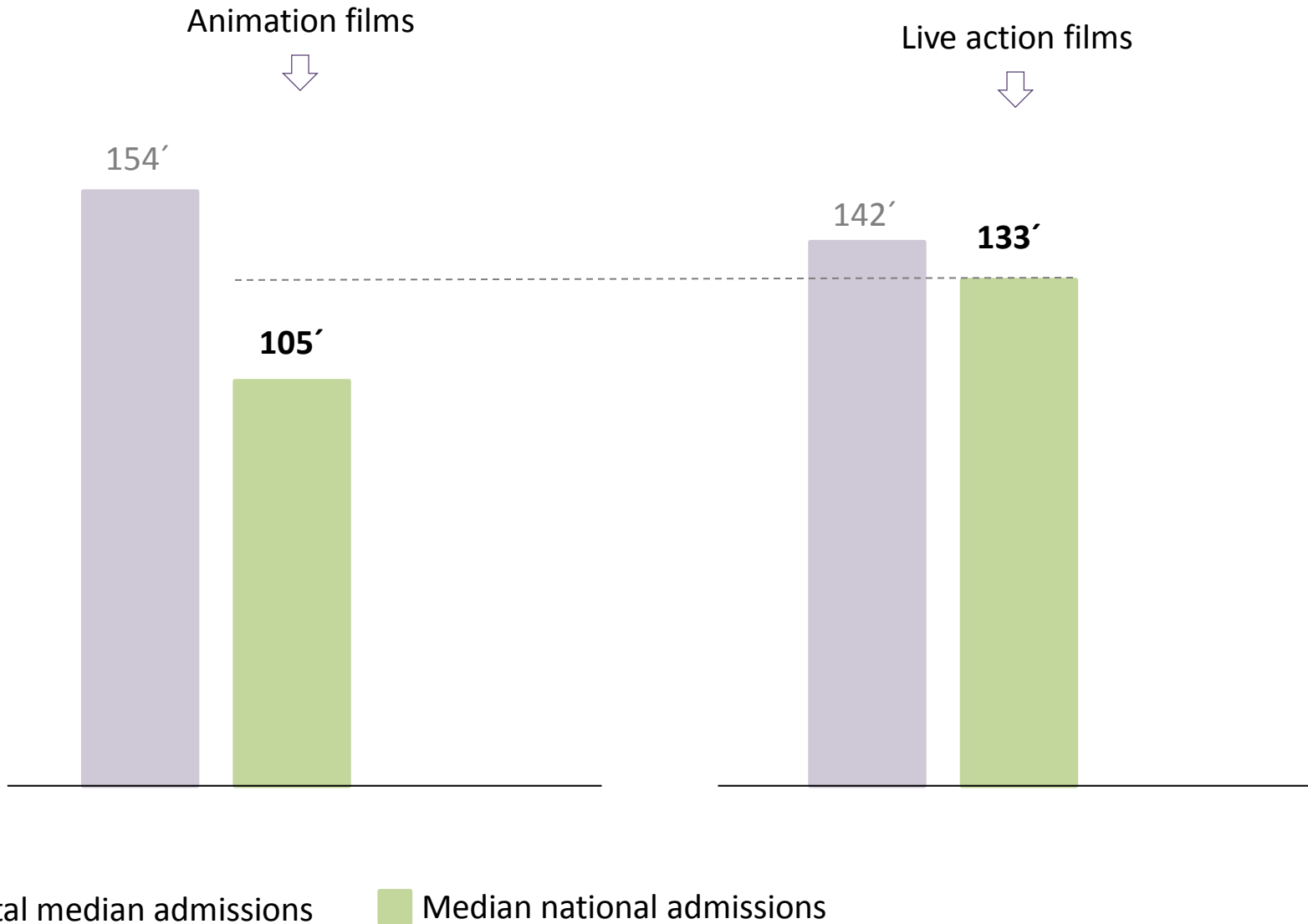
Source: OBS



■ Total median admissions

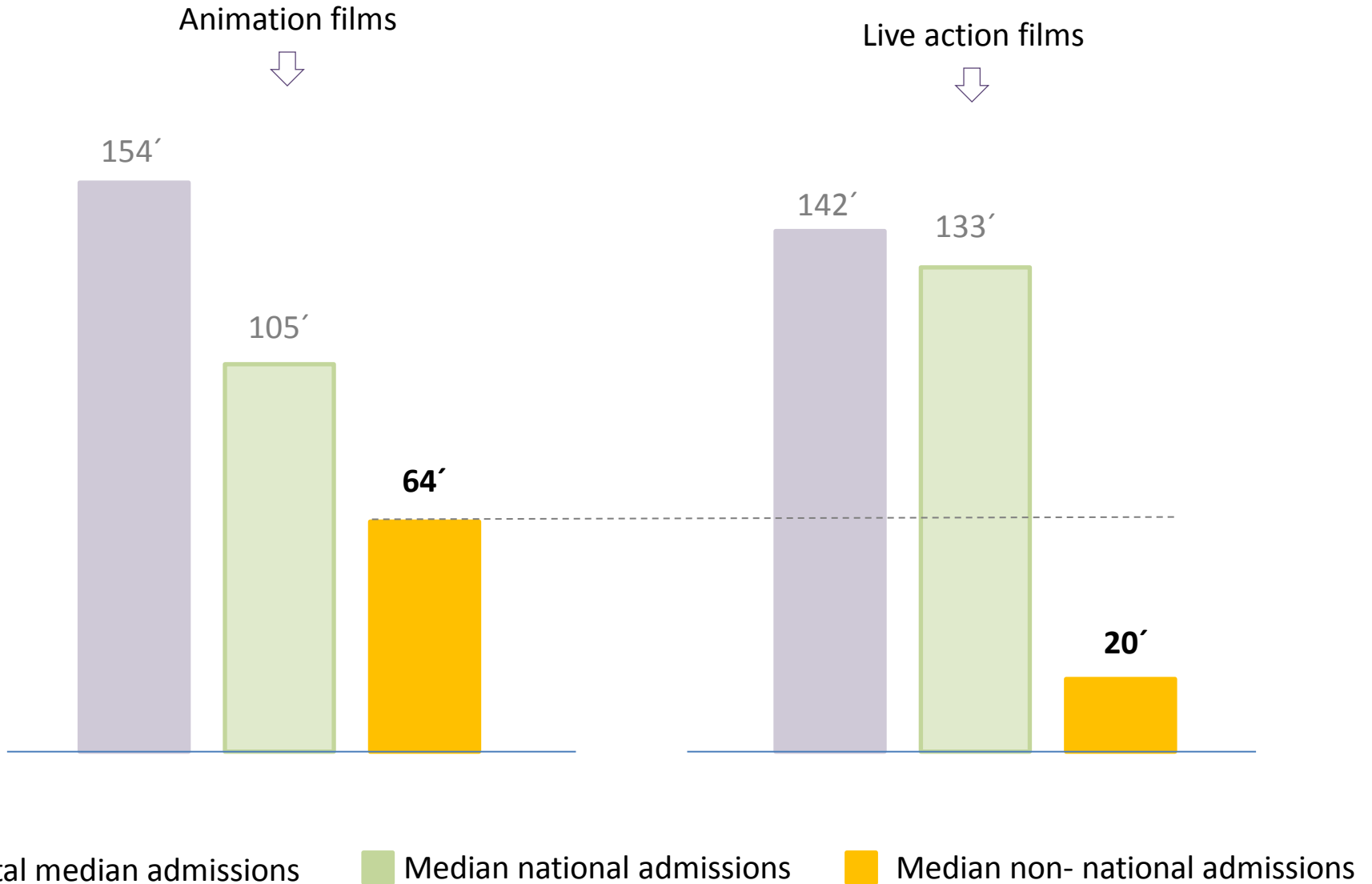
# ... though live action films perform better domestically ...

Source: OBS



# ... while animation films perform better on non-national markets

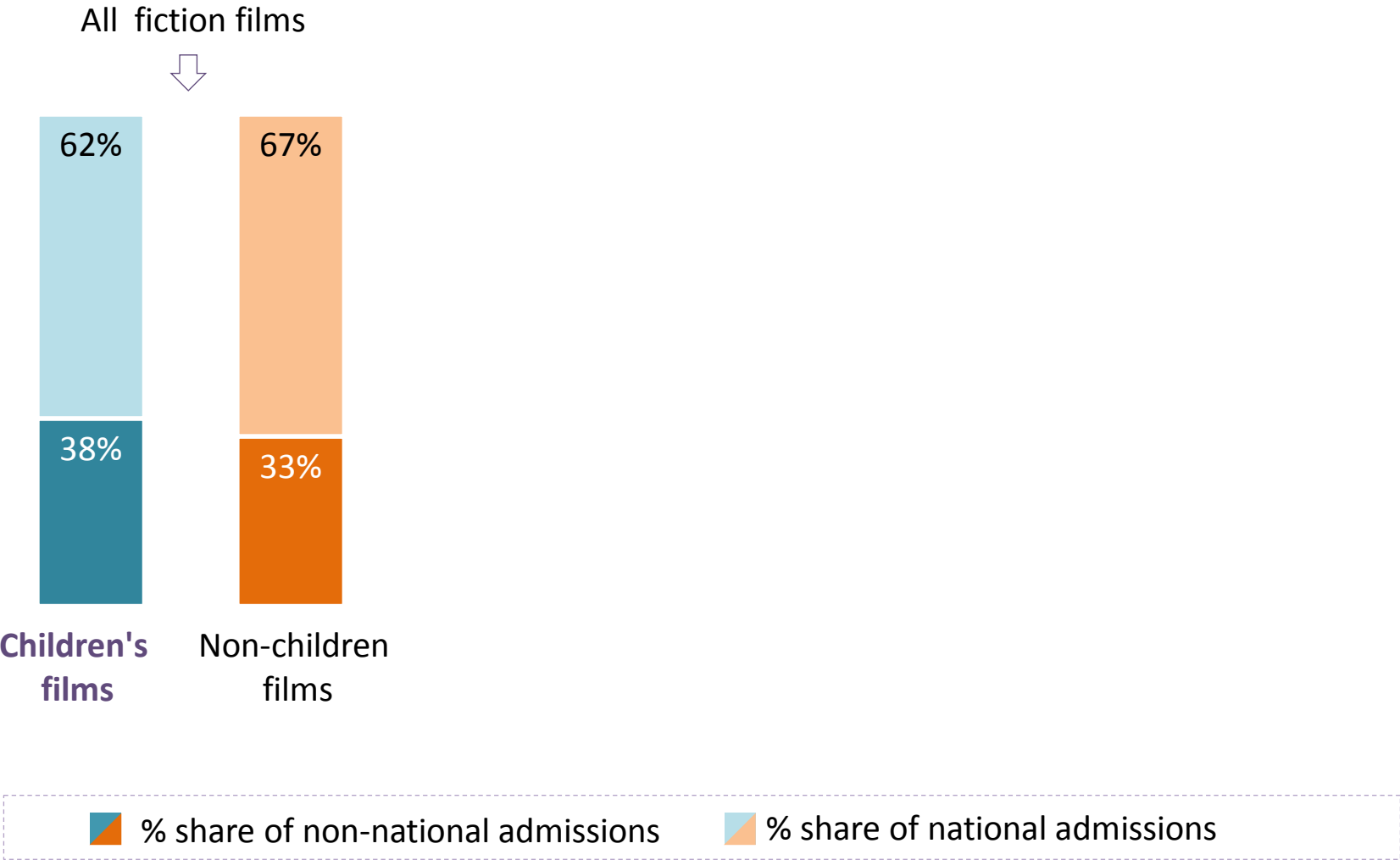
Source: OBS



How important are  
non-national markets  
for children's films?

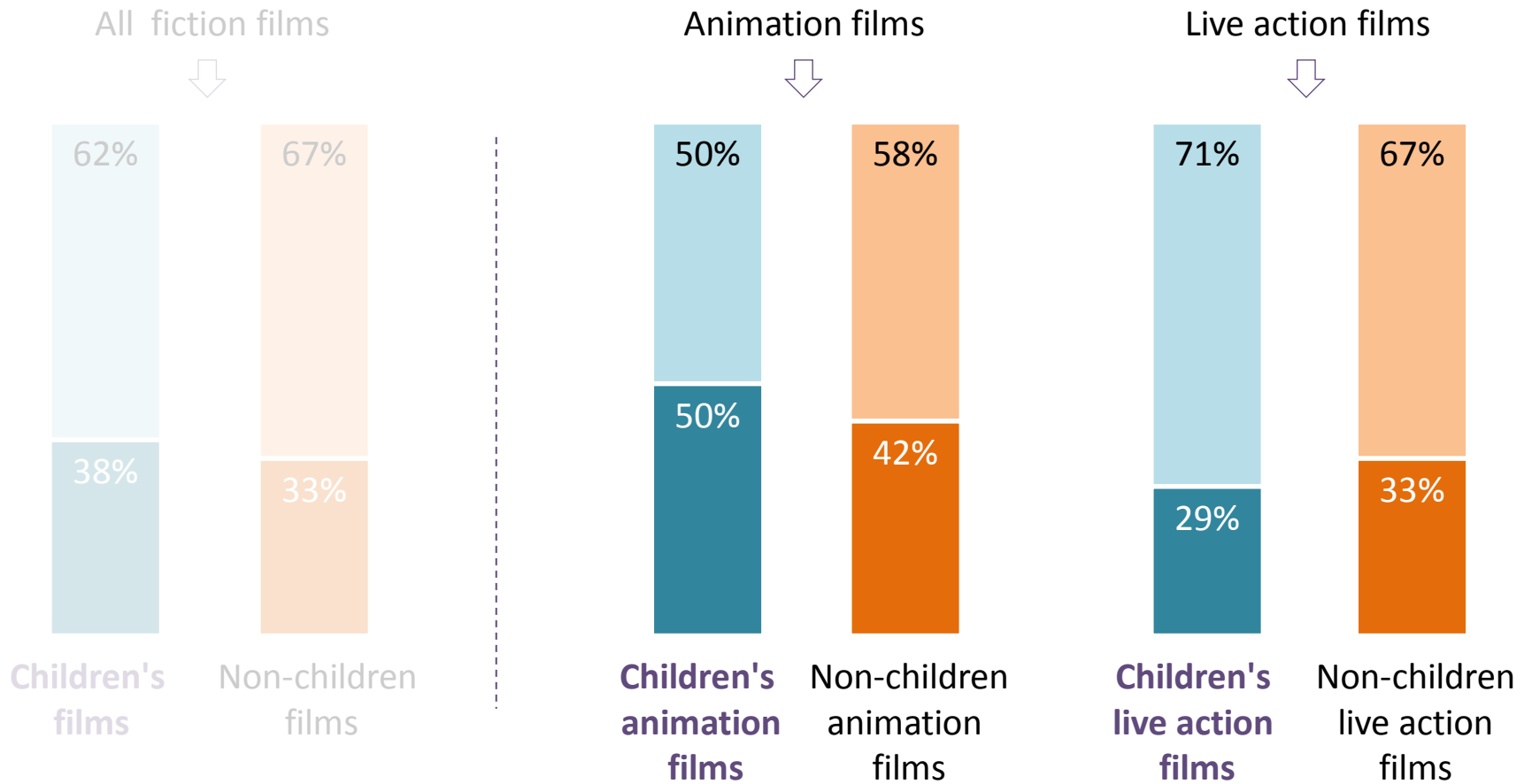
# Children's films sell 38% of their tickets on non-national market


Source: OBS



# ... animation films even 50%

Source: OBS



 % share of non-national admissions

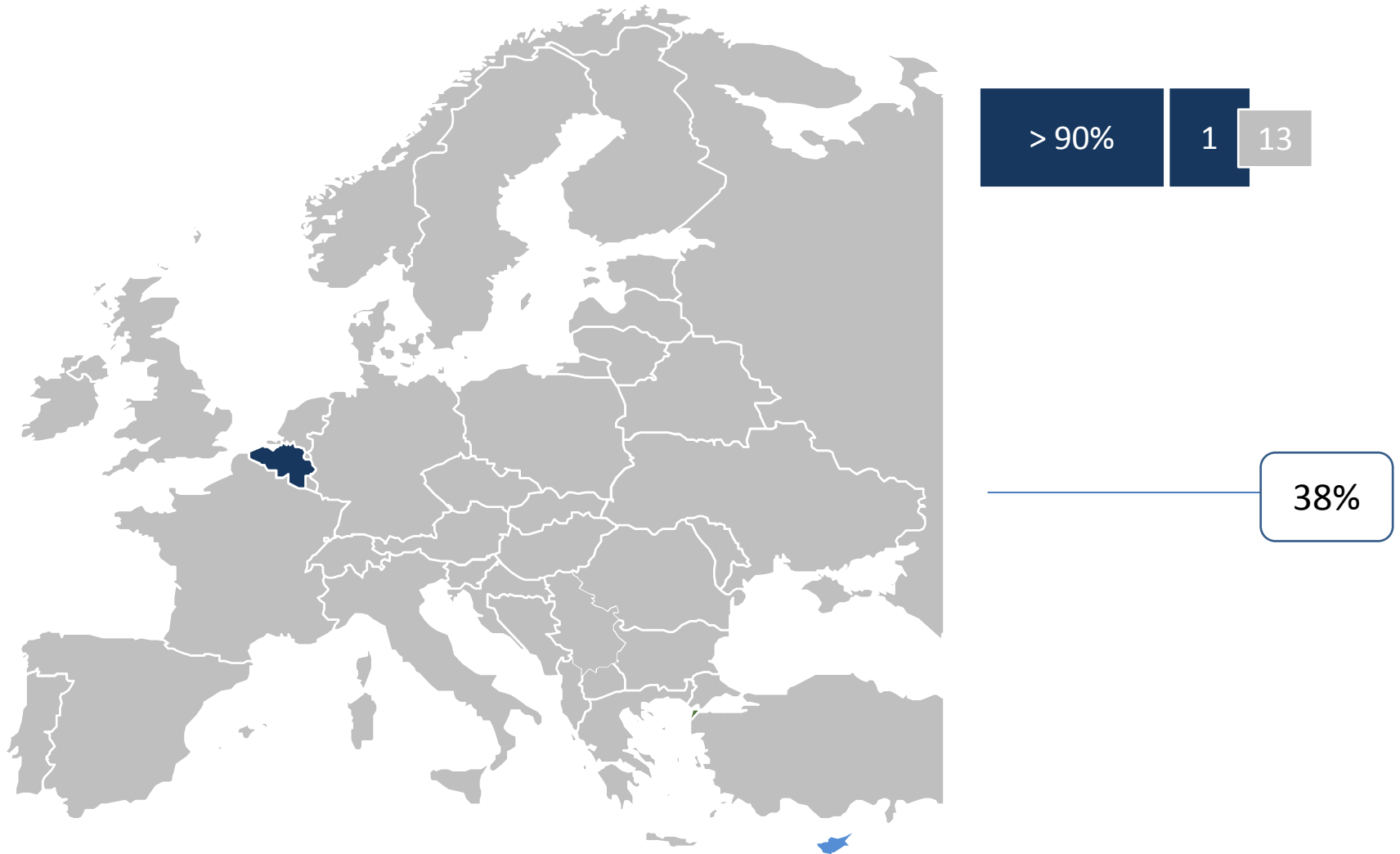
 % share of national admissions



For which countries  
is the export of children's films  
particularly important ?

# Belgian children's films generated 90% of their total admissions . outside of Belgium

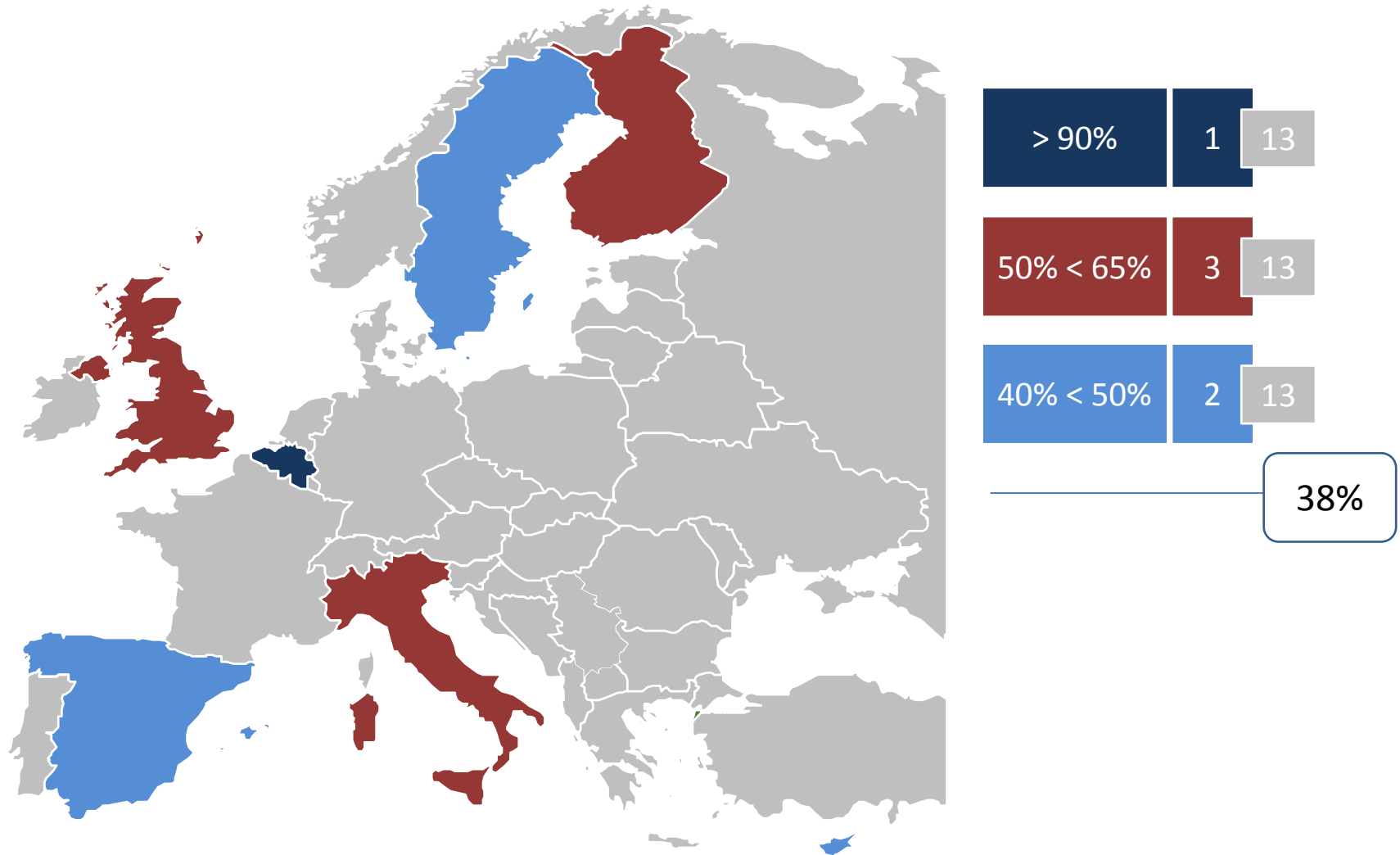
Source: OBS



Note: Only takes into account countries with at least 5 children's films released on non-national markets

# Other “export” countries included e.g. UK, Finland and Italy

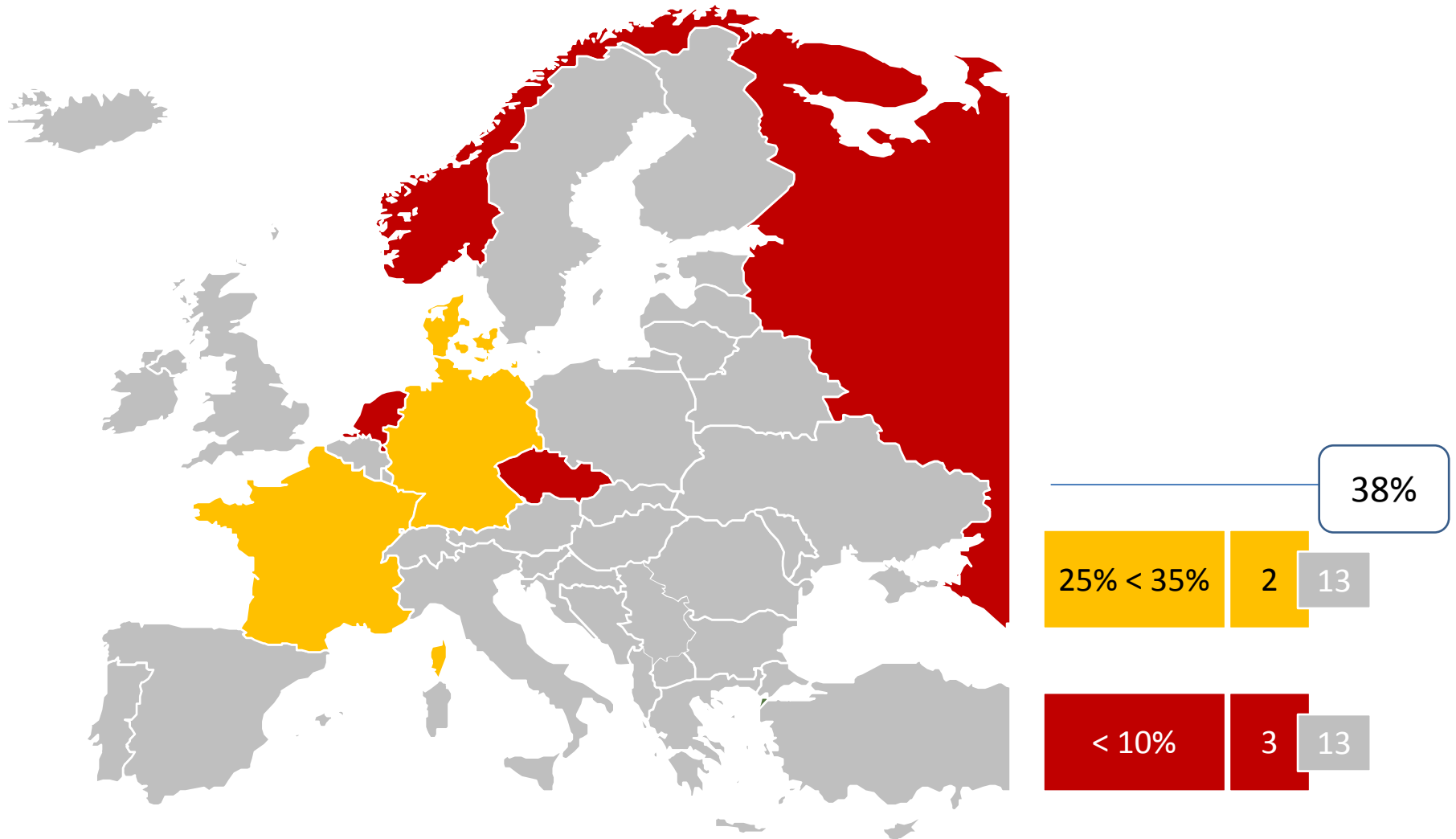
Source: OBS



Note: Only takes into account countries with at least 5 children’s films released on non-national markets

# National markets more important in e.g. Germany or France

Source: OBS

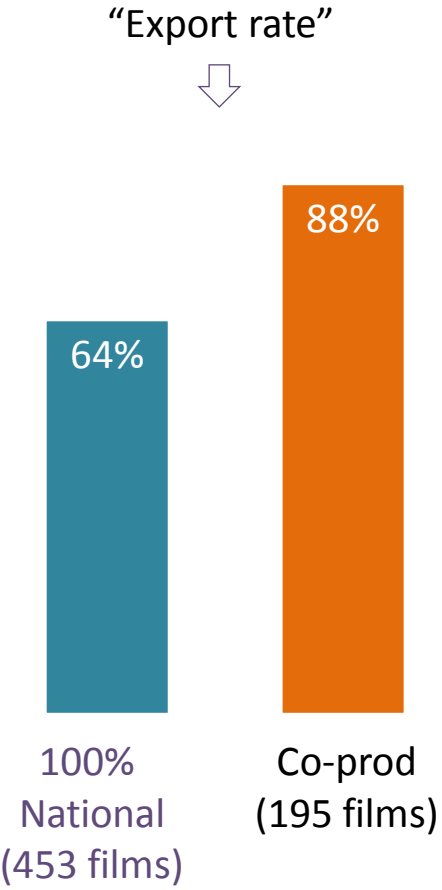


Note: Only takes into account countries with at least 5 children's films released on non-national markets

Do co-produced children's films  
travel and perform  
better than 100% national films?

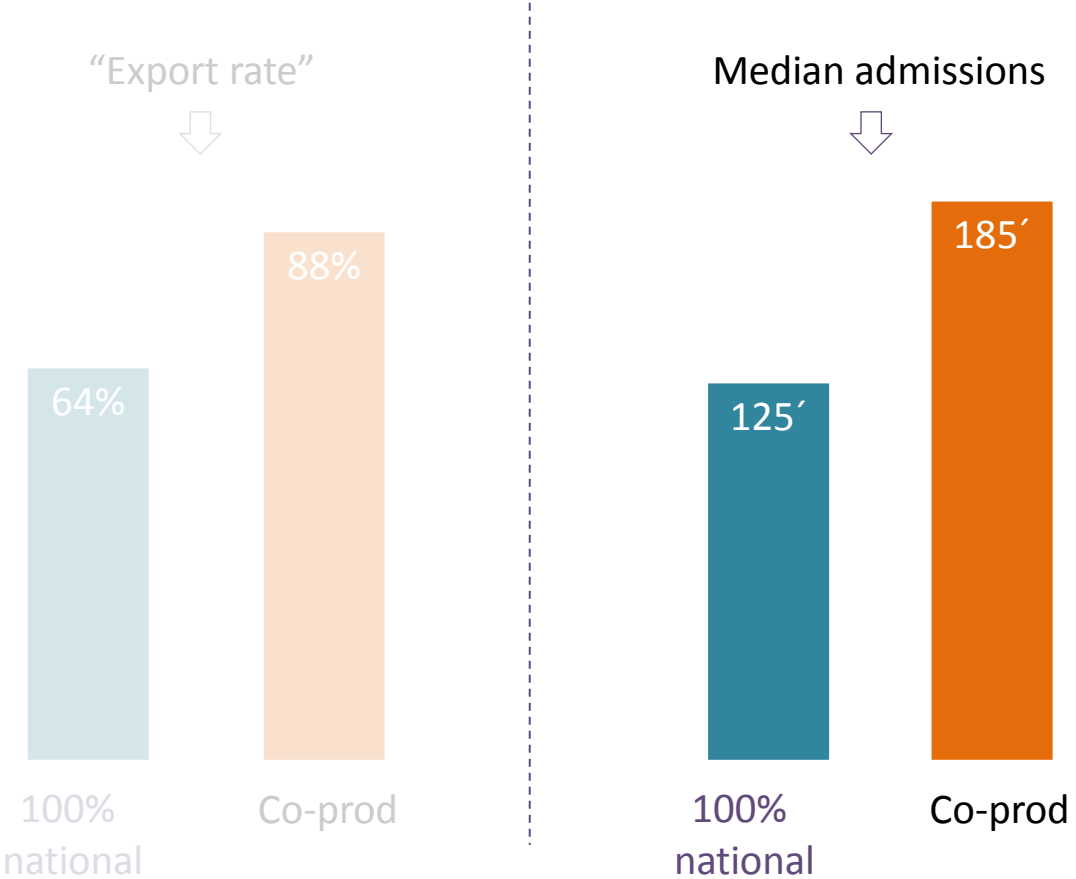
# 88% of children's co-productions get non-national release ...

Source: OBS



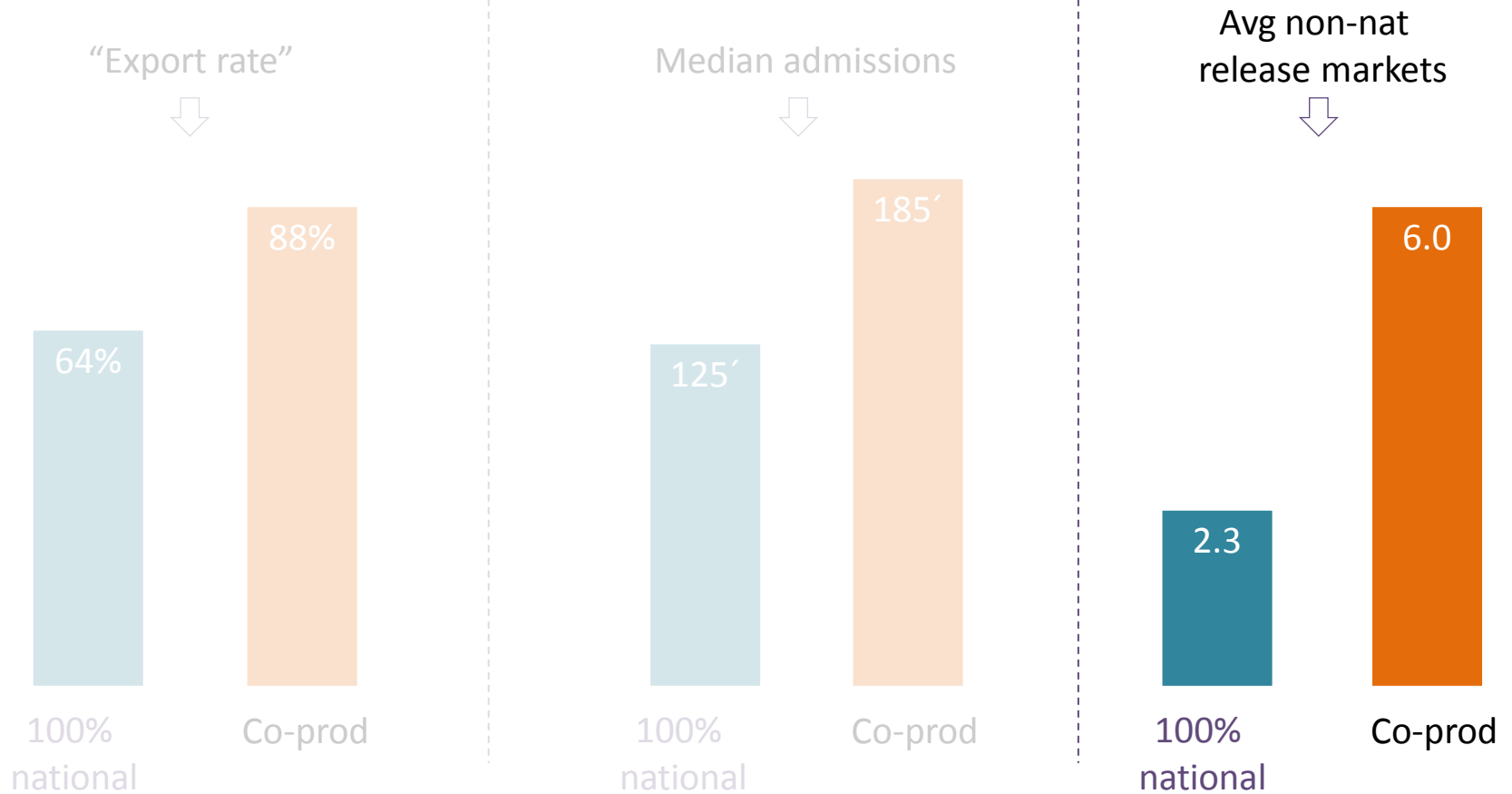
# Co-productions generate higher admissions on average ...

Source: OBS



# ... and get released on average on 6 non-national markets

Source: OBS





Conclusion:

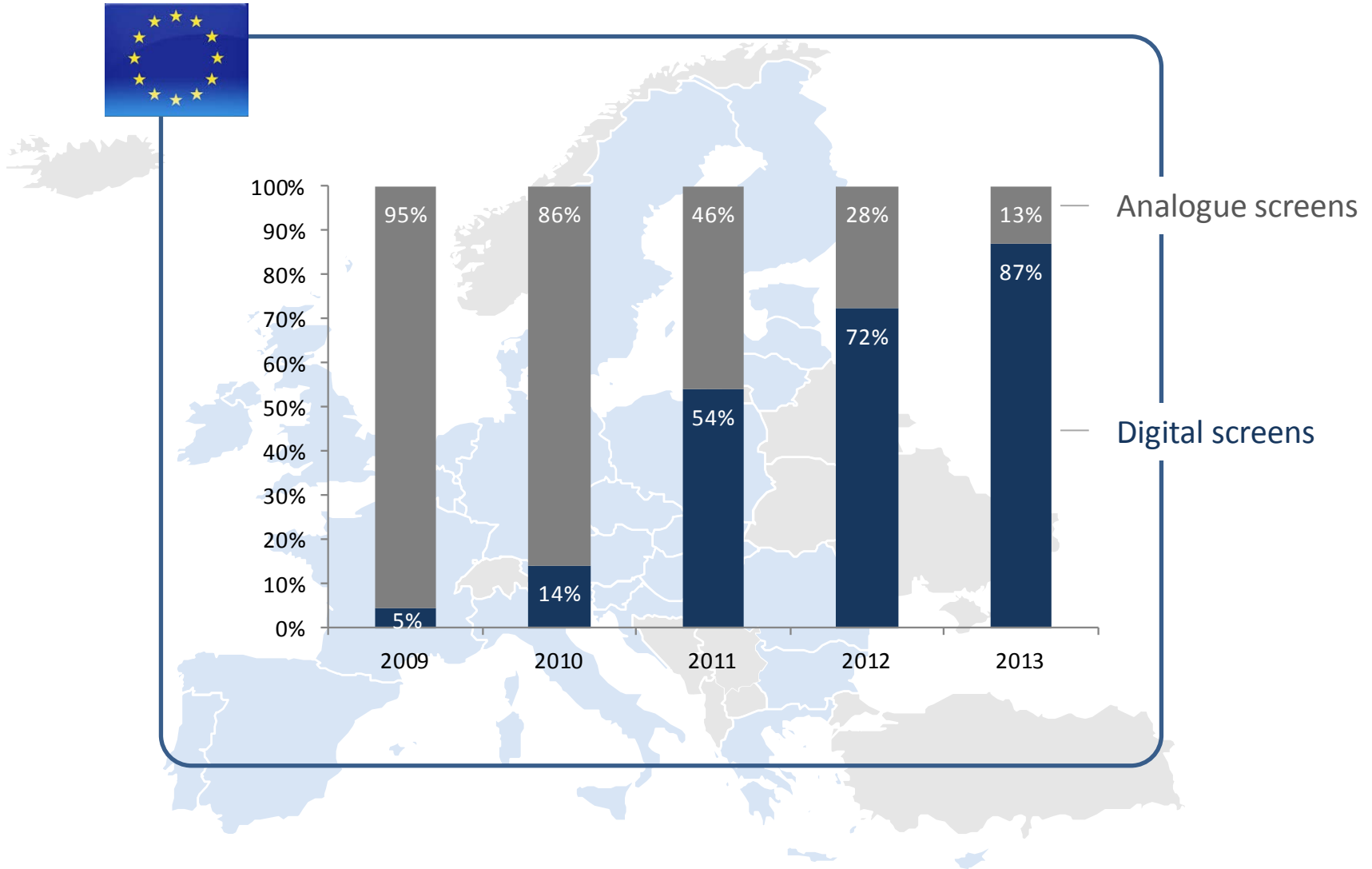
European children's films  
travel and perform better  
than other European fiction films

Some thoughts on the  
„access question“

Impact of digital distribution?

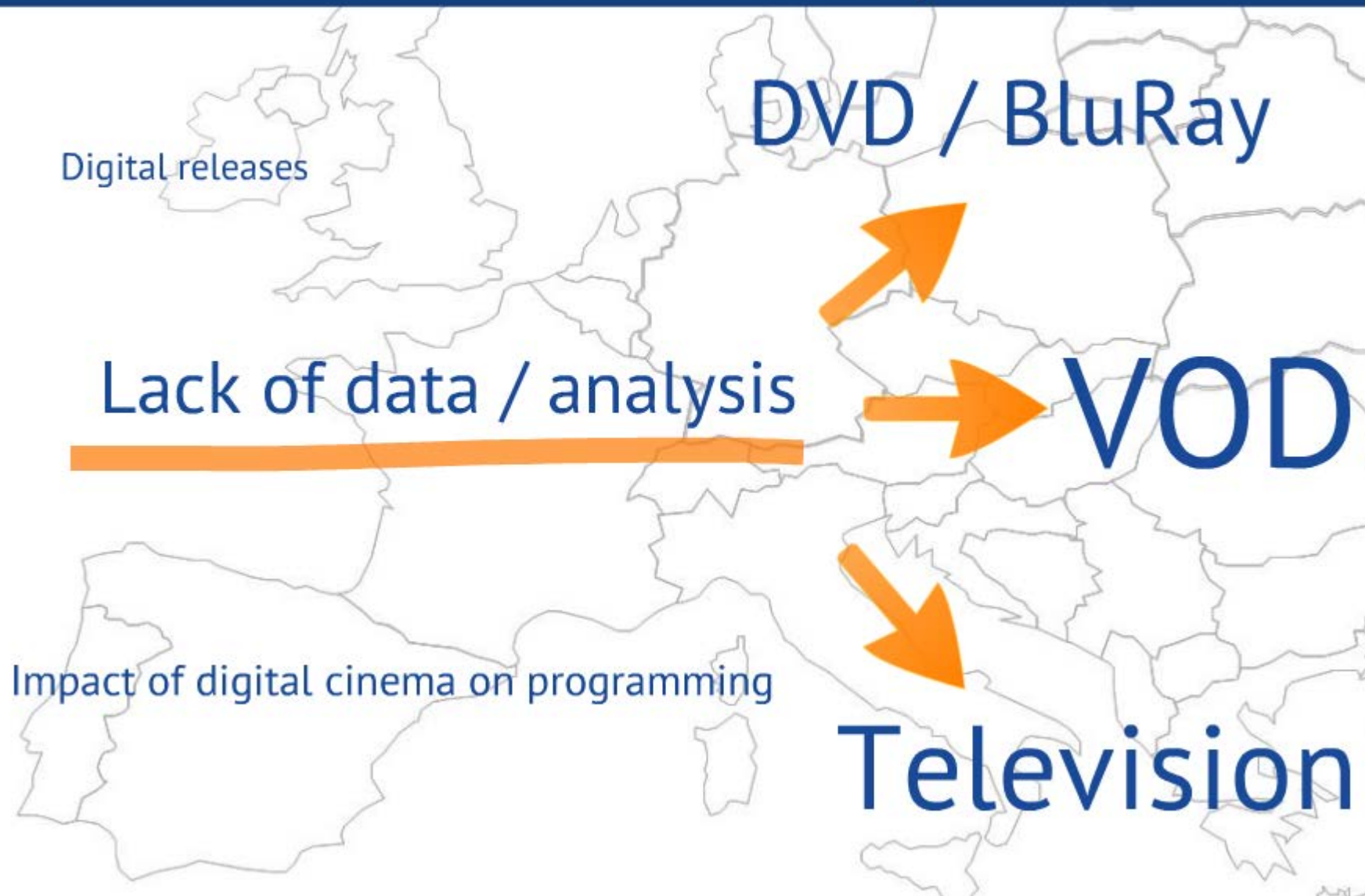
# 87% of EU screens converted to digital by end 2013

Source: MEDIA Salles, OBS



... more importantly?

# Do we have the whole picture?



# MORE INFORMATION

[www.obs.coe.int](http://www.obs.coe.int)

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