



# building bridges

European Children's  
Film in Focus

kids  regio



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Film in Focus

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# Foreword

by Catherine Trautmann, President of Eurimages  
and Patron of the KIDS Regio Forum 2024

Since its first edition in 2009, the KIDS Regio Forum has served as a platform for professionals working in the children's film industry to meet and share their experiences. It provides them with a dedicated space to analyse and discuss the current state of the industry, to develop ideas and strategies to meet new challenges in European children's film, and to further promote cinema for children.

As was noted in both the Erfurt and Weimar Declarations developed at earlier KIDS Regio Fora, these films form an essential part of the concept of cultural diversity and are an invaluable tool for media literacy, and cultural and personal education.

Eurimages, the Fund which I preside, shares this vision of film as a vector of cultural diversity and pluralism, both of which are essential to the proper functioning of democracy. Commitment to these values, which are central to the Council of Europe, Eurimages' parent organization, was recently reinforced by the member States of the Council of Europe through the Reykjavik Declaration.<sup>1</sup> This declaration reminds us that we need to strive continuously to uphold democratic values, both now and in the future. It is thus our role to share these values with those who will need to defend them in the years to come, our children and young people. As participants at the 2024 KIDS Regio Forum learned, viewing films at home and in cinemas with family and friends are a formative part of a child's experience, and one that they value highly. Ensuring that these experiences include films made from a specifically European perspective and reflecting our values is essential.

<sup>1</sup> <https://www.coe.int/en/web/cm/reykjavik-summit>

As a co-production fund, Eurimages also believes in the power of film to create connections, not only between professionals, but also by helping important stories to reach out to audiences, including young audiences, everywhere. In this context, the research undertaken specially for the 2024 KIDS Regio Forum has provided enlightening insights on the common perception of film by children across 12 different European countries.

Over the last 15 years, the network created by KIDS Regio Forum has contributed to further strengthening the partnerships between children's film professionals, funders and distributors from within the European film industry.

My exceptional patronage of this year's KIDS Regio Forum underlines the importance that Eurimages sees in these partnerships and in continuing to deepen co-operation across all areas where concerted reflection and action can lead to measurable progress in favour of young audiences.

I am confident that this event has been a significant step in identifying creative and effective ways to strengthen the children's film industry in Europe and build upon the achievements of the previous KIDS Regio Fora.

Children are our future, and providing entertaining, accessible, and meaningful films for young audiences is not only necessary, but our duty.



# Introduction

by Anne Schultka, Project Manager KIDS Regio & Elisabeth Wenk, CEO German Children's Media Foundation Golden Sparrow

In today's rapidly changing world, the values of democracy, diversity and cultural identity are more important than ever. Children's films play a key role in shaping the perspectives of young audiences, fostering understanding, empathy and a sense of shared values. The 4th KIDS Regio Forum in 2024, under the theme "Building Bridges", focused on policy, knowledge sharing and networking. It emphasised the importance of connecting different levels of decision-makers and stakeholders to ensure recognition of the social and cultural importance of children's films.

We were therefore particularly proud that the event was held under the esteemed patronage of the European Parliament and Catherine Trautmann, President of Eurimages. These prestigious endorsements underline the importance of children's films in Europe and the importance of our critical work.

Looking back at the 3rd KIDS Regio Forum in 2019 and its outcome in the form of the Weimar Declaration, it is clear that progress has been slower than hoped over the past five years. The pandemic and other external factors have posed significant challenges. Many of the issues highlighted in the 2019 Declaration echoed those of the 2009 Erfurt Declaration, underscoring the fact that meaningful change requires both time and resources. This led KIDS Regio to seek out old and new allies for the 2024 Forum, inviting many first-time participants and those from outside the children's film sector. This inclusive approach was aimed at fostering broader collaboration, as collective efforts are essential to achieve substantial progress.

Reflecting this attitude, from 2019 KIDS Regio has moved to a three-year collaborative model to support the development of

industry programmes for children's film across Europe. After fruitful partnerships with m:brane in Malmö and Young Horizons Industry in Warsaw in the past, KIDS Regio will now collaborate with the JUST Film Industry Days at the Black Nights Film Festival in Tallinn starting in 2024. This approach allows KIDS Regio to provide targeted support, help build strong industry networks, and then move on to support new partners in different regions.

An example of the tangible impact of KIDS Regio's work is the progress made by the Swiss Children's Film Working Group. This group gained momentum following the 2019 Forum, using the networking opportunities provided to advance their goals and become more professional. Their publication, "Children's Film Strategy for Switzerland: What We Can Learn from Europe", published in January 2023, serves as a valuable resource that can be adapted by other countries. KIDS Regio plans to translate this strategy into English to further promote the exchange of knowledge and best practices and so improve the conditions for children's films throughout Europe.

A key focus of the 2024 Forum, and an outcome of previous Forums, has been the need for more research and data. In partnership with Will&Agency, KIDS Regio have conducted the pioneering pan-European study "Keeping up with Children as an Audience". This comprehensive research, involving 374 children aged 7-11 from 12 European countries, combined qualitative and quantitative methods to provide valuable insights. One of the most significant findings highlighted the social nature of film viewing, with children often watching films at home with their family. This insight confirms the unique value of film and cinema as a shared experience, especially at a time when media consumption is becoming increasingly individualistic.

The study also revealed that young European audiences share more similarities than differences, with preferences influenced by age rather than nationality or gender. This insight is crucial for

distribution strategies, emphasizing the potential for the cross-border appeal of children's films. The comprehensive data gathered provides a strong foundation for advocacy efforts, highlighting the impact of European children's films on promoting cultural and linguistic diversity and fostering a European identity. In addition to qualitative insights, the demand for quantitative data on the European children's film sector remains high. Ahead of the 2024 Forum, KIDS Regio renewed its collaboration with the European Children's Film Association (ECFA) and the European Audiovisual Observatory (EAO) to update data on European children's films. Led by Dr Becky Parry, the first results were presented at the Forum, sparking discussions about the data available and its role in advocacy. These conversations highlighted the need for more context and refinement of the database, with an annual publication of analysed data being crucial for informed policy-making.

Looking ahead, KIDS Regio aims to use the momentum from the Forum to engage in broader conversations on the topics discussed. The Forum report will compile and preserve the participants' insights and ideas, making them accessible and understandable for a wider audience. The report will be released with multiple parts:

**BOOK 1** Building Bridges: A shared Mission for Children's Film in Europe

**BOOK 2** Keeping Up with Children as an Audience

**BOOK 3** European Children's Film: What Counts?

Beyond the Forum, KIDS Regio continues to engage in strategic activities at EU level to promote the importance of children's films. Past initiatives, such as presenting at various policy meetings and organising screenings of children's films in a political context, aimed to highlight the value of children's films as a cultural asset. These efforts will remain a cornerstone of KIDS Regio's strategy as the organisation seeks to build stronger networks and inform policy at both national and European levels.

For an unfiltered insight into the Forum's activities and discussions, the live editorial will continue to be available on our website. As we move forward, KIDS Regio remains committed to promoting the importance of children's films in helping to shape a diverse and democratic Europe. The outcomes of the Forum will serve as a basis for ongoing dialogue and collaboration, driving the development of children's cinema in Europe and reinforcing the values of democracy, diversity and cultural identity.

With this in mind, we hope you enjoy reading the report.



## BOOK 1

### A Shared Mission for Children's Film in Europe

building  
bridges

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## Design & Participants

better  
together!

### SYSTEMIC DESIGN APPROACH

The KIDS Regio Forum 2024 was designed with a clear focus on fostering actionable outcomes and building connections across the film sector. Participants engaged in developing policy prototypes through metaphorical bridge-building exercises that visualised the steps needed to transition from the current state of the film industry to a more inclusive and innovative future for children's film. By organising the tasks into short, medium and long-term goals, and considering the resources needed and potential challenges to be faced, participants were encouraged to think strategically and pragmatically about their goals.

The structure of the Forum prioritised small group activities and discussions, creating a dynamic environment that encouraged deep engagement with the issues at hand. This framework not only facilitated practical outcomes but also provided a unique opportunity for participants to recharge, affirming that they are not alone in their efforts, and that similar challenges are faced across Europe. Additionally, the Forum's engaging structure attracted significant attention and support for KIDS Regio's ongoing initiatives, paving the way for continued advocacy and collaboration in the months ahead.

### DIVERSITY AND EXPERTISE OF PARTICIPANTS

A key element of the Forum's success was the diversity of its participants. This year, KIDS Regio again made a concerted effort to include a wide range of voices, inviting experienced professionals from 25 European countries. These included representatives from the children's film industry as well as from film and cultural policy organisations, funding bodies and advocacy groups. Many first-time participants and individuals from outside the children's film sector were included to bring fresh perspectives and foster a more holistic dialogue.

This deliberate mix of participants was designed to encourage cross-sectoral collaboration and ensure that all aspects of the children's film ecosystem were represented. By bringing together people with different backgrounds and expertise, the Forum aimed to generate new ideas and partnerships that could move the industry forward.

## WORKING GROUP COMPOSITION AND NAMING

The working groups were a central feature of the Forum's design, reflecting its focus on practical outcomes and collaboration. Participants were assigned to groups to ensure a balance of knowledge and experience, and to create an environment in which everyone could contribute meaningfully to the discussions. This thoughtful composition was designed to maximise the exchange of ideas and foster mutual learning.

Aware of the lack of recognition of European arthouse children's films, each working group was named after a representative example from across the continent. This choice served not only as a unique identifier, but also as a symbolic reminder of the Forum's mission to celebrate and promote children's cinema across Europe. The names, drawn from a mix of well-known and lesser-known films, helped to instil a sense of pride and purpose among the participants, reinforcing the cultural diversity and creativity at the heart of the event.



## DOUBLE TROUBLE



**Julianne Forde** Tailored Films **Sebastian Markt** Berlinale Generation  
**Ariel Bianucci** European Film Agency Directors **Jo Mühlberger** European  
 Film Promotion e.V. **Nora Lakos** Cinemira Hungary **Heleen Rouw** Cinekid  
**Petra Rockenfeller** Lichtburg Filmpalast Oberhausen, AG Kino Gilde  
**Klemen Dvornik** Federation of European Screen Directors

## BEANIES



**Elisabeth Wenk** German Children's Media Foundation Golden Sparrow  
**Jure Bušić** Jaka produkcija **Charlotte Appelgren** CineRegio Association  
 of Film & AV Funds **Manuel Fioroni** European Audiovisual Observatory  
**Markus Görsch** Mitteldeutsche Medienförderung **Becky Parry** European  
 Children's Film Association **Jeanette Schjerva** Film i Skåne  
**Noémie Levadoux** Europa Cinemas

## MOOMINS



**Mikk Granström** Black Nights Film Festival **Annelie Zapfe** Representation  
 of the Free State of Thuringia to the EU **Ivana Đurašković** Film Centre of  
 Montenegro **Radka Hoffmanová** Young Film Fest, Visegrad Young Film  
 Days, Kino Kavalírka **Eszter Lányi** National Film Institute Hungary  
**Magda Wyleżalek** Young Horizons Industry **Manu Guddait** Berlinale –  
 European Film Market **Pantelis Panteloglou** European Children's Film  
 Association

## LAIKAS



**Martin Blaney** Screen International **Julia Krättli** Zürcher Filmstiftung  
**Signe Zeilich-Jensen** Freelance **Mariella Harpelunde Jensen** Buster  
 Filmfestival **Janne Vierth** Swedish Film Institute **Heike Meyer-Döring**  
 Creative Europe Desk NRW

## WOLF- WALKERS



**Edita Bilaver** Kids meet Art **Petra Slatinšek** Kinodvor **Godefroy Vujicic** Association Pictanovo **Kristina Trapp** EAVE **Marta Jodko** International Young Audience Film Festival Ale Kino! **Terje André Nymark** North Norwegian Film Centre **Margret Albers** European Children's Film Association **Christoph Schweitzer** State Chancellery of Thuringia

## WILD CHICKS



**Katharina Albrecht** Akademie des Österreichischen Films **Julia Tal** AG Kinderfilm **Michael Harbauer** SCHLINGEL – IFF for Children & Young Audience **Vėjūnė Dūdėnienė** Sklavija Cinema Center **Victoria Thomas** London Film School / Anti Racism Task Force for European Film **Petri Kempainen** Good Hand Production **Carolina Mancini** Cineuropa **Catarina Ramalho** PLAY

## COMEDY QUEENS



**Alfred Sesma Siuraneta** Drac Màgic – Pack Màgic **Gudrun Sommer** DOXS RUHR **Tamara Kolaric** Dublin City University **Rebecca Hartung** Pluto Film Distribution Network GmbH **Rüdiger Hillmer** German Children's Film Association **Elin Algreen-Petersen** The Cross Media School of Children's Fiction **Christine Eloy** Europa Distribution **Rikke Flodin** PUBLIKUM / Will & Agency

## KAUW- BOYS



**Nina Richter** Reykjavik International Film Festival – RIFF **Mark Higham** European Film Academy **Maria Papasotiri** Thessaloniki Film Festival **Thomas Hailer** Akademie für Kindermedien / Nordic Film Days Lübeck **Mirja Frehse** Creative Europe Desk Berlin-Brandenburg **Pauline Durand-Vialle** Federation of European Screen Directors **Hilde Steenssens** Film'On **Marlena Gabryszewska** Arthouse Cinemas Association

## Welcome Keynote

keeping up  
with children  
as an  
audience

held by Rikke Flodin

Rikke Flodin presented the results of a study conducted by KIDS Regio in collaboration with Will & Agency. The project, which spanned 12 European countries and regions, aimed to understand young audiences between the ages of 7 and 11. The participating countries were Belgium, Estonia, Germany, Greece, Italy, Montenegro, the Netherlands, Norway, Poland, Portugal, Switzerland and Wales.

The study involved 374 children and used a combination of qualitative interviews and quantitative research methods to gather comprehensive data. One of the key findings was that children perceive **watching films as a social activity**. At home, films are often watched with parents and siblings, highlighting the importance of family bonding when watching films.

When children go to the cinema, their focus shifts to the overall experience rather than just the film itself. The trip to the cinema is valued for its immersive environment, the big screen, and the excitement of the outing. This underlines the powerful function of **film and cinema as a shared experience**, which stands out in an age where media consumption is often isolated.

Another key finding was the **significant similarities between young audiences in different countries**. Age, rather than nationality or gender, was found to be a major determinant of children's preferences and viewing habits. This finding suggests that a universal approach may be effective in addressing the needs and interests of young European audiences.



The study also showed that children quickly outgrow content made specifically for them, often finding it too childish. They prefer stories with characters slightly older than themselves and are **looking for more complex narratives** that match their growing maturity and curiosity.



For a deeper understanding of these findings and their implications, we encourage you to read the full research report in Book 2 of this publication and watch the keynote video via the QR code.  
<https://kids-regio.org/forum-2024/keynote-by-rikke-flodin>



## What is Policy?

policy  
is us!

In shaping the future of children's film, policy serves as a crucial foundation for establishing a shared vision and a structured approach. The 4th KIDS Regio Forum focused on policy as a guiding framework for discussions, with the aim of developing strategies that meet the diverse and evolving needs of the children's film sector. In line with this, the first group work session naturally focused on the concept of policy. Participants were encouraged to reflect on their understanding of policy and where it is shaped, to collect keywords, and to define the term together – an exercise that forms the basis of this chapter. This approach creates a formal structure for setting clear goals, allocating resources efficiently, and promoting shared values across the sector.

In this context, policy is not just a set of rules, but a dynamic tool that connects ideas, individuals and visions to real action – similar to how storytelling shapes narratives in film. By conceptualising policy as a form of storytelling, a coherent narrative is created that reflects a commitment to fostering an inclusive, supportive and forward-looking environment for children's film and media. Policy, like storytelling, can be used to translate aspirations into actionable strategies.

## OUR DEFINITION OF POLICY:

*A policy can be understood as a formally structured framework or strategy developed and agreed upon by institutions or governing bodies with the aim of achieving specific objectives in areas such as politics, economics, education or, in this case, children's film. Policies provide a formal mechanism for shaping decisions, guiding actions, and allocating resources to achieve these goals.*

*In practice, policy encompasses a range of measures such as laws, regulations, administrative actions and voluntary practices. When based on evidence and best practice, policies are highly effective in promoting advocacy, raising awareness, facilitating access, and encouraging collaboration and multi-level governance. Of course, the success of policies still depends on factors such as political will, resources, the involvement of stakeholders and the context.*



## KEY ELEMENTS OF POLICY:

- **Formal Agreement:** Policies are developed and ratified by official institutions such as governments, organisations, or companies.
- **Varied Forms and Domains:** Policies may take the form of laws, regulations, procedures, or incentives, and are applied across various fields, including media, education, and economics.
- **Goal-Driven Structure:** They are designed to achieve clearly defined goals, allocate resources efficiently, and create structural frameworks that promote shared values and visions.
- **Evidence-Based:** Effective policies are informed by research, best practice, and empirical data to ensure relevance and efficacy.
- **Advocacy and Protection:** They play a central role in advocating for key stakeholders, raising awareness, ensuring protection, and providing access to essential resources.
- **Networking and Collaboration:** Policies support networking and cooperation across different sectors and levels, from local to European governance.
- **Adaptability and Flexibility:** Policies are not static; they are flexible frameworks that can evolve and adapt in response to changing needs and emerging contexts.

By approaching policy as a storytelling tool, the aim is to frame the children's film sector within a structured, strategic, and adaptable plan. This ensures that the support and production of children's film remains responsive to the evolving needs of young audiences while supporting its cultural and educational objectives across Europe.

## Input Sessions: Strategies, Structures & Processes

moving  
towards  
something  
together

As explored in the previous chapter, the effectiveness of policy work is often grounded in an evidence-based approach. In line with this, the KIDS Regio Forum 2024 input sessions were structured to offer participants both practical insights and concrete examples from across the children's film sector. These sessions, focused on structures, strategies, and processes in development, aimed to equip participants with knowledge that could help inform and shape their approach to children's film policy. While the Forum fostered rich discussions following each input, this chapter focuses on the key presentations, showcasing the expertise and inspiration that participants drew from, allowing them to leave the Forum equipped with actionable ideas and new perspectives.



## LEARNING FROM THE QUEST TO IMPLEMENT THE UN CONVENTION ON THE RIGHTS OF THE CHILD

*Is it possible to implement UNCRC by integrating it into an institution? How far can you take it and what do you need to begin the work?*



**Jeanette Schjerva**

Film i Skåne

Jeanette Schjerva shared insights from Film i Skåne's journey toward integrating the UN Convention on the Rights of the Child into the organisation's daily work starting from 2021. The initiative aimed to increase young people's influence on content and strengthen long-term structures for their interaction with the film industry. Film i Skåne now has two certified child rights strategists. Schjerva outlined the meticulous process, from initial extensive research and staff training on the UNCRC articles to detailed internal reviews and reporting. This comprehensive approach ensured a deep, organisation-wide commitment to children's rights and set a benchmark for similar institutions.

## LOBBYING FOR UNGRIFF (E. YOUTHRIF): NAVIGATING CHILDREN'S FILM POLICY IN ICELAND

*How can we adapt existing policies to better support cultural projects like children's film festivals?*

**Nína Richter**

Reykjavik International Film Festival

Nína Richter outlined the strategies used in lobbying for the creation of UngRiff, Iceland's children's film festival established in 2023. She discussed the difficulties of adapting policy frameworks and funding models to better support cultural projects, especially those aimed at children. Richter emphasised the importance of creating flexible and adaptable policies that can evolve with the changing cultural landscape, thereby fostering the growth and sustainability of children's film festivals. Her insights highlighted the potential for policy adaptation to have a lasting impact on the cultural sector.



## BARRIERS TO ENTRY VERSUS BARRIERS TO SUCCESS

*How can we identify and remove systemic barriers to success and so ensure greater representation in the European Film Industry?*



**Victoria Thomas**  
ARTEF Anti Racism Taskforce  
for European Film

Victoria Thomas explored the systemic barriers that perpetuate discrimination and limit diversity within the European film industry. Thomas highlighted observations on these structural challenges and discussed the Berlinale premiere of the Norwegian animation film "Helt super" as a case study, where misunderstandings and accusations overshadowed the film's debut, highlighting the complexity of tackling racism in the industry. Her session proposed practical solutions, such as expanding the list of qualifying festivals for award nominations to include smaller, niche festivals and so promote greater inclusivity and representation.

## EUROPEAN CHILDREN'S FILM: WHAT COUNTS?

*What quantitative data about children's film is accessible, and how can we use it to lobby for children's film?*

### Dr Becky Parry

Dr Becky Parry shared insights from KIDS Regio's collaboration with the European Children's Film Association and the European Audiovisual Observatory, focusing on accessible quantitative data on children's film production, releases and audiences across Europe. The session invited participants to discuss the further research and data needed to effectively lobby for the future of children's film. Dr Parry emphasised the importance of data-driven advocacy in shaping policy and securing support for the children's film sector. It became clear that more detailed data is needed and that continuous data collection at the national level is key to providing coherent, comparable figures across Europe.



## LIFE AS A FILM LOBBYIST IN BRUSSELS

*Where are the currents shifting?*

**Pauline Durand-Vialle**

FERA Federation of European Screen Directors

Pauline Durand-Vialle gave an insightful overview of the challenges and strategies of lobbying for film policy in Brussels. She described the disproportionate representation in lobbying efforts between cultural protection advocates and large corporate interests from US entertainment and Big Tech, as well as new players such as streamers and private broadcasters. By explaining how EU laws are made, Durand-Vialle highlighted the need for practical approaches and national influence to counterbalance these powerful entities, and emphasised the importance of aligning member states' views to effectively influence European policy.



## FILM IN THE SLOVENIAN SCHOOL CURRICULUM

*How can film education be  
integrated into school curricula?*

**Petra Slatinšek** Kinodvor

Petra Slatinšek discussed the integration of film education into the Slovenian school curriculum. She detailed the steps taken by an advisory group to successfully lobby for film as a subject, noting that although it has been included, it remains optional and less frequently chosen than science or sport. Slatinšek emphasised the importance of linking schools with cinemas through initiatives such as "Arts Education Days", which bring thousands of children into cinemas each year. She stressed that the key to success is to maintain a close relationship with the target audience and to continuously adapt strategies to their needs.



## HOW I LEARNED TO FLY – A PAN-EUROPEAN DISTRIBUTION CAMPAIGN

*What steps or innovative approaches could further increase the international reach and success of children's films in today's competitive market?*

### Rebecca Hartung

PLUTO FILM Distribution Network

Rebecca Hartung presented a comprehensive case study on the distribution campaign for "How I learned to fly", a children's film by Radivoje Andrić. She detailed the film's festival strategy, which included premieres at key festivals such as BUFF and participation in several award events. The session highlighted the innovative Audience Design methodology, which facilitated collaborative workshops and pan-European marketing strategies. Despite setbacks such as the rejection of the Films on the Move application, a distribution support scheme run by the Creative Europe Media Programme, Hartung stressed the need for early involvement of sales agents, sufficient funding for dubbing, and robust social media campaigns to increase the film's international reach and success.



## LEARNING FROM THE MOST PERFECT FILM LAW FOR CHILDREN AND YOUTH IN THE WORLD

*How can European funding systems help to support stories that reach young audiences in local European languages and reflect the present, past and future of young generations?*

### Mariella Harpelunde Jensen

BUSTER Film Festival

Mariella Harpelunde Jensen reflected on Denmark's National Film Act, which allocates 25% of film production funds to films for children and young people. She noted the successes, such as the renewed film club system and a curated film collection for schools, which attract hundreds of thousands of young viewers each year. However, Jensen noted the recent decline in the production of children-only films, as funding is diverted to films deemed suitable for teenagers and young adults. She stressed the need for regular reviews of such policies and called for educational films to be made more appealing to young audiences in order to maintain their relevance and impact.



## REVITALIZING NON-COMMERCIAL FAMILY FILM VIEWERSHIP IN EUROPE

*What role can film festivals and distribution programmes play in shaping the future of non-commercial family film viewing?*



**Vėjūnė Dūdėnienė**

Skalvija Cinema Center

Vėjūnė Dūdėnienė addressed the decline of non-commercial family film audiences in Europe, attributed to an ageing audience and competition from multiplexes and streaming services. She outlined strategies to revitalise this sector, emphasising the importance of educational and artistic children's films. The session explored the role of film festivals and distribution programmes in promoting non-commercial content, suggesting that these platforms can play a crucial role in maintaining and growing audiences for quality family films.

## THINKING ABOUT (EUROPEAN) AUDIENCES?

*When working on a film project, what do you consider the 'metrics of success' you would want to achieve with it?*



**Tamara Kolarić**

University of Dublin

Tamara Kolarić explored the complexities of defining success for European co-productions, which often struggle to attract large audiences despite their ambitious scope and diverse financing. Drawing on a research paper co-authored with Petar Mitric, Kolarić used the Serbian-Bosnian-Croatian co-production "Quo Vadis, Aida?" to illustrate the different perceptions and expectations of European audiences. She also touched on the challenge that co-productions face in balancing the different expectations of funding bodies, co-production partners, etc., which can complicate efforts to clearly target an audience. Kolarić proposed a framework for understanding audience segments and their motivations, emphasising the importance of thoughtful audience design during production and distribution. The session aimed to equip film professionals with practical strategies to better engage their target audiences and achieve greater success.

## BUILDING NETWORKS FOR CINEMAS AND LIFTING UP THE YOUNG AUDIENCE – A JOINT MISSION

*How can we build a participant-driven network,  
and what can we learn from similar networks?*

**Jeanette Schjerva** Film i Skåne  
**Petra Rockenfeller** AG Kino Gilde

Jeanette Schjerva and Petra Rockenfeller shared their experiences of setting up children's cinema networks in Sweden and Germany. In Sweden, the Children's Cinema Network, supported by Film i Skåne, includes 58 member cinemas and offers digital meetings, exchange of best practices, and online workshops. In Germany, initiatives such as Vision Kino Kongress and Innovation Labs, supported by AG KINO Gilde, promote cooperation between cinemas and distributors. Both speakers emphasised the importance of marketing and audience engagement and suggested the creation of cinema networks across Europe to share resources and strategies for making cinemas more child-friendly.



## ONE EFFICIENT RECIPE TO KEEP CHILDREN'S FILMS CIRCULATING AND REACHING A BROADER AUDIENCE INTERNATIONALLY

*How can we create a safe environment for film publishers  
and distributors to keep promoting children's films and  
distribute them on as many channels as possible?*

**Christine Eloy**  
Europa Distribution

Christine Eloy discussed strategies to improve the distribution and promotion of children's films. She emphasised the need for robust educational rights and the early involvement of distributors in the production process. Eloy pointed out that dubbing remains a critical but expensive necessity for wider distribution. She also stressed the importance of retaining educational screening rights with distributors to ensure continued promotion. The session proposed innovative solutions, such as the use of AI to reduce dubbing costs and improved marketing support during production, to create a more favourable environment for the distribution of children's films across Europe.



## LOBBYING FOR CHILDREN'S FILM - THE POWER OF COLLECTIVE WORK

*How can collaboration enhance awareness in the industry, networking, and financial backing?*

**Julia Tal** AG Kinderfilm  
**Pantelis Panteloglou** ECFA  
**Margret Albers** FDK

Julia Tal, Pantelis Panteloglou and Margret Albers represent three different but very similar institutions. AG Kinderfilm is the youngest, having started its work in Switzerland fuelled by the last KIDS Regio Forum. The German (FDK) and European Children's Film Associations (ECFA) have been around for much longer. But all of them share a commitment to making a positive impact on the film industry for young audiences. Tal, Panteloglou and Albers explored how successful national initiatives can serve as models for other countries, and how international cooperation can foster shared solutions to common challenges. The session highlighted the importance of collective work and collaboration in raising industry awareness, building robust networks and securing financial support for children's films.



## FEATURE FILMS FOR 6-8 YEAR OLDS

*Why is it crucial to develop live-action films specifically tailored for children aged 6 to 8, and what steps should the industry take to address this need?*



**Dr Rüdiger Hillmer**  
German Children's Film Association

Dr Rüdiger Hillmer addressed the lack of live-action films for children aged 6-8, a focus of the working group "Feature Films 6-8" within the German Children's Film Association. Through extensive discussions with stakeholders, including broadcasters, producers, cinema operators, media educators and children, the group has identified a strong interest and need for such films. However, significant challenges remain, particularly in terms of production financing and market competition dominated by animation and established franchises. The association and its working group are now seeking to share their findings with the industry, aiming to nurture efforts in developing and supporting live-action films for this age group.

## REBRANDING YOUNG HORIZONS

*How do you brand to appeal to a diverse audience of all ages?*

**Magda Wylężałek**

Young Horizons

Magda Wylężałek discussed the comprehensive rebranding of the Kids Kino International Film Festival (IFF) to Young Horizons IFF after nine years. The rebranding included a new name, identity, visual key and communication strategy to appeal to a wider audience and new generations who do not want to be identified solely as children. Extensive research was conducted to understand the expectations of a visually oriented generation that values design as much as language.

Wylężałek highlighted the importance of being open and global in branding to remain relevant to professionals. The rebrand aims to balance the needs of both young audiences and industry professionals, ensuring that the festival appeals to all age groups and remains relevant and accessible to all visitors.



## Stakeholders & Resources

what makes  
a successful  
strategy?

As noted in the previous chapter on policy, the success of any initiative depends heavily on the commitment of key stakeholders and the availability of essential resources. They form the backbone of effective strategies and ensure that visions can be translated into tangible, actionable results.

During the working session on this topic, participants used different approaches to identify these critical elements. This intermediate step underlined how the alignment of stakeholders and resources is fundamental to the enabling of effective and sustainable change in the European children's film industry. Some groups focused on specific input sessions, using concrete examples to identify key actors and resources. Others took a broader view, looking at common actors and resources across a range of successful strategies. In a third approach, participants drew on their own expertise and experience to inform the discussion. By way of illustration, a selection of commonly identified stakeholders is presented here, with a more detailed breakdown available in the live editorial.



YOUNG AUDIENCE



TEACHER



CINEMA MANAGER



DISTRIBUTOR



RESEARCHER



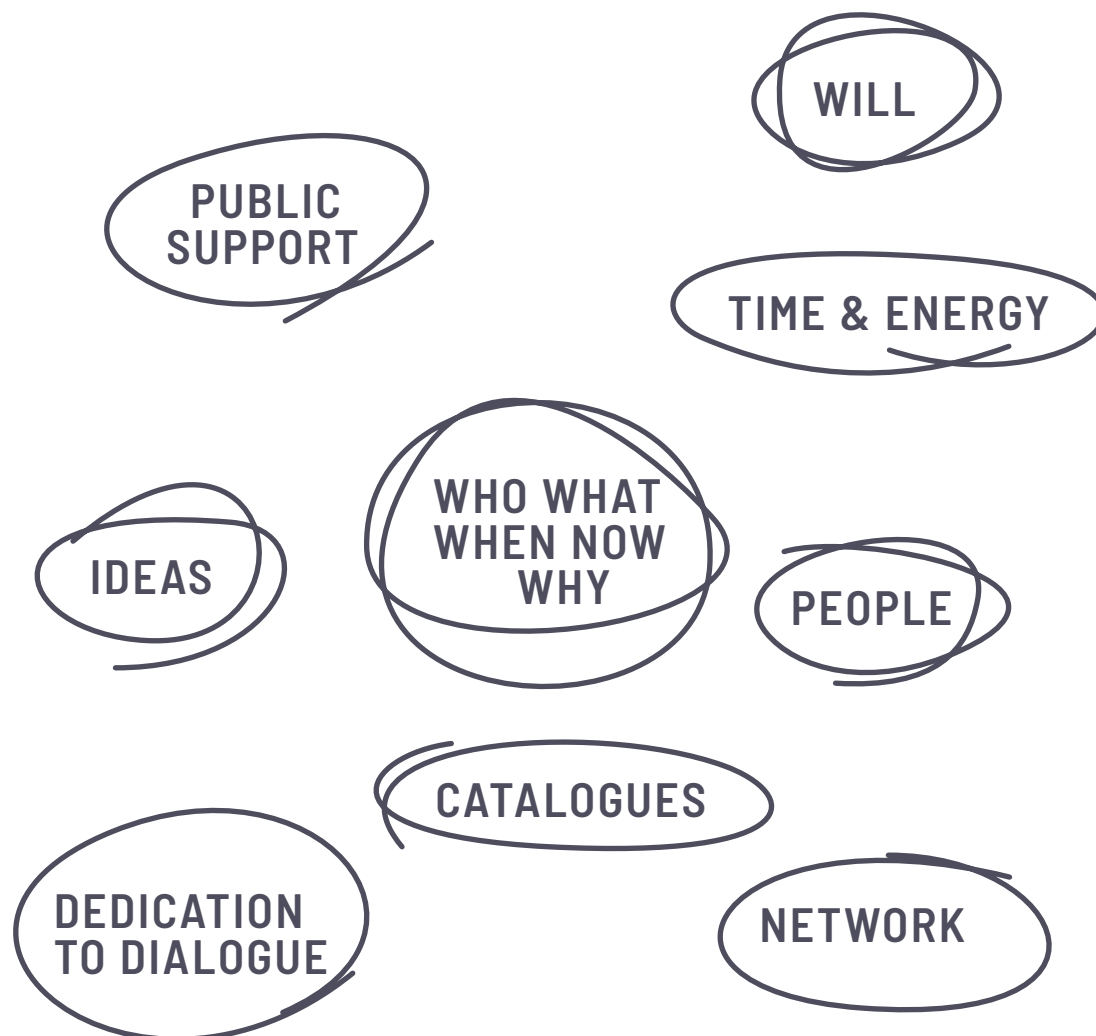
POLITICIAN



FESTIVAL DIRECTOR



Equally importantly, resources – both **tangible and intangible** – were identified as essential components in the development of robust strategies. Beyond the obvious **financial support, resources such as expertise, networks and data** emerged as vital. Participants emphasised the need to harness personal and collective resources, including public support, storytelling and creative talent. These findings reflect the fact that real success depends not only on financial investment, but also on the strategic use of knowledge, ideas and human capital.



## Great News

creating  
a vision

Working within timeframes of one, three or five years, the expert participants drew on earlier discussions and key insights to imagine what success might look like for the children's film industry. The resulting title stories, while aspirational, were firmly grounded in the realistic challenges and opportunities identified during the Forum.

In analysing these title stories, several recurring themes emerged, reflecting the participants' shared ambitions. While the stories were part of an exploratory exercise, they still offer meaningful insights into potential strategies for the future of European children's cinema. Although not comprehensive, these stories provide an indication of the way forward and the practical steps needed to turn long-term aspirations into concrete achievements.



All title stories can be found in our live-editorial.

<https://kids-regio.org/forum-2024/live-editorial>



## Common Themes of Title Stories

### 1. PAN-EUROPEAN COOPERATION AND NETWORKS

Pan-European cooperation and networks are essential for the growth and sustainability of European children's cinema. Collaboration between different countries helps to pool resources, share expertise, and create a unified approach to the promotion of children's cinema across Europe. Cooperation fosters a sense of unity and collective progress within the industry.

### 2. LOBBYING AND POLITICAL SUPPORT

Lobbying and political support are vital for the advancement of European children's cinema. Political support is essential for the film industry to receive the resources and recognition it needs to thrive.

### 3. PRODUCTION AND CREATION OF CHILDREN'S FILMS

The production of children's films represents a central pillar of the industry, requiring significant effort and resources. Strong political support, robust networks, and financial backing are essential for both major and independent productions. International cooperation fosters creativity and resource sharing.

### 4. DISTRIBUTION AND ACCESS

It is of utmost importance to improve distribution and access in order to achieve a wider reach for children's films. By improving distribution conditions, films can be made more widely available, ensuring that diverse audiences have the opportunity to experience them, thereby promoting cultural and educational benefits.

### 5. FILM AS AN EDUCATIONAL TOOL

Films are an invaluable educational resource, facilitating enhanced learning experiences and fostering critical thinking among younger audiences. They offer a unique and engaging avenue to explore a multitude of themes and impart invaluable lessons, making education more accessible and engaging viewers through storytelling.

### 6. RECOGNITION FOR EUROPEAN CHILDREN'S CINEMA

Recognising the achievements of European children's films is important if they are to continue to be successful. The recognition these films receive through awards and market dominance is a clear indication of their impact and quality. This ought to be acknowledged. By celebrating these successes, further investment and support for European children's cinema will be encouraged.

[#bettertogether](#) [#childrensfilmrules](#) [#FILMISCULTURE](#)  
[#Storytellingforchildren](#) [#CREATIVEYOUNGEUROPE](#)  
[#youthfilmsROCK](#) [#childrensfilmmonthup](#)

## Inspirational Dialogue

a mission to  
share and  
influence

written by Christian Deschutter

Before the final work phase of KIDS Regio Forum 2024, business consultant Edita Bilaver, who co-founded Kids Meet Art, and Petri Kemppinen, an authority on international children's films, were invited to an inspirational conversation.

KIDS Regio Forum, said Bilaver, provides a rare opportunity to focus exclusively on children's film strategies. Participants come together for two days – away from their usual day-to-day concerns, which often prevent strategic thinking. While attending the 2019 edition, she was struck by the idea that everyone present shared the same vision: the participants faced similar challenges and potential obstacles, which made collaborative problem-solving more effective.

Initially, Kemppinen didn't know what to expect from this edition. After the Weimar Declaration in 2019, he felt, that although it seemed like a great statement, it lacked concrete follow-on actions. KIDS Regio Forum 2024, however, exceeded his expectations. "The insights from various groups were not only interesting but also inspiring; demonstrating that positive developments were occurring at regional and national levels." For him, the most daring questions were about content – "Something we usually do not dare to speak about that much because it's easier to talk about details. Here, it came up from the very start with the opening keynote."

The two also agreed that the Forum allowed participants to define their stakeholders. "It is pretty easy to list all of them," Bilaver noted. "But what do we actually know about them?" Is there an ongoing dialogue to pinpoint their goals, challenges or needs? Do we have an opportunity to talk to them like we did over these two days?

Passionate discussions about problems and solutions also left the two with a strong sense of community. This network, as Bilaver put it, is of immense value. KIDS Regio Forum “is one of the very few platforms, if not the only one, that brings together all the actors in our field, representing each part of this chain of activities.”

Together, the participants who gathered in Erfurt represent associations, institutions, and organisations across Europe, each with extensive networks of professionals. Through their respective roles and spheres of influence, these participants can share the insights and outcomes from the Forum with their wider communities, effectively reaching well over 10,000 professionals actively engaged in film, and particularly in children’s film, across Europe.

The first thing she planned on returning home was to do what she also did last time: write a short recap. Back in 2019, Bilaver translated the Weimar Declaration and compiled a list of all the stakeholders, taking it on herself to inform the Croatian Minister for Culture, as well as the Croatian Audiovisual Centre.

Kemppinen said he would do the same, even though he had been quite frustrated with local officials showing little interest before. “However, I will overcome that feeling because of the valuable insights gained from these working groups. I’m ready to fight again!”

Let's be bold !

The two therefore called upon all KIDS Regio Forum participants to join them in their mission to share and influence; an approach that can be effective at both regional and national levels. “We must provide evidence that what we do truly matters — presenting it in a professional manner, stripped of emotion. Let’s be bold and professional as we pitch our ideas and advocate for support. It’s essential to articulate our needs accurately, illustrated with correct data and concrete examples,” they concluded.

Petri Kemppinen  
& Edita Bilaver



Watch the full inspirational dialogue on our website.  
<https://kids-regio.org/forum-2024/inspirational-dialogue>





Here is their checklist for how to take action:

## MISSION CHECKLIST

- ☐ Write a detailed report
- ☐ Translate key statements and documents
- ☐ Compile a comprehensive list of stakeholders
- ☐ Ensure that all stakeholders are informed about the key outcomes of the Forum
- ☐ Be prepared to engage repeatedly to ensure continued interest and support
- ☐ Define clear advocacy objectives based on the Forum's discussions
- ☐ Use accurate data and concrete examples to support advocacy
- ☐ Lobby for support at regional, national and European levels
- ☐ Be bold and professional when presenting ideas to policymakers

## Connecting Policy & Storytelling

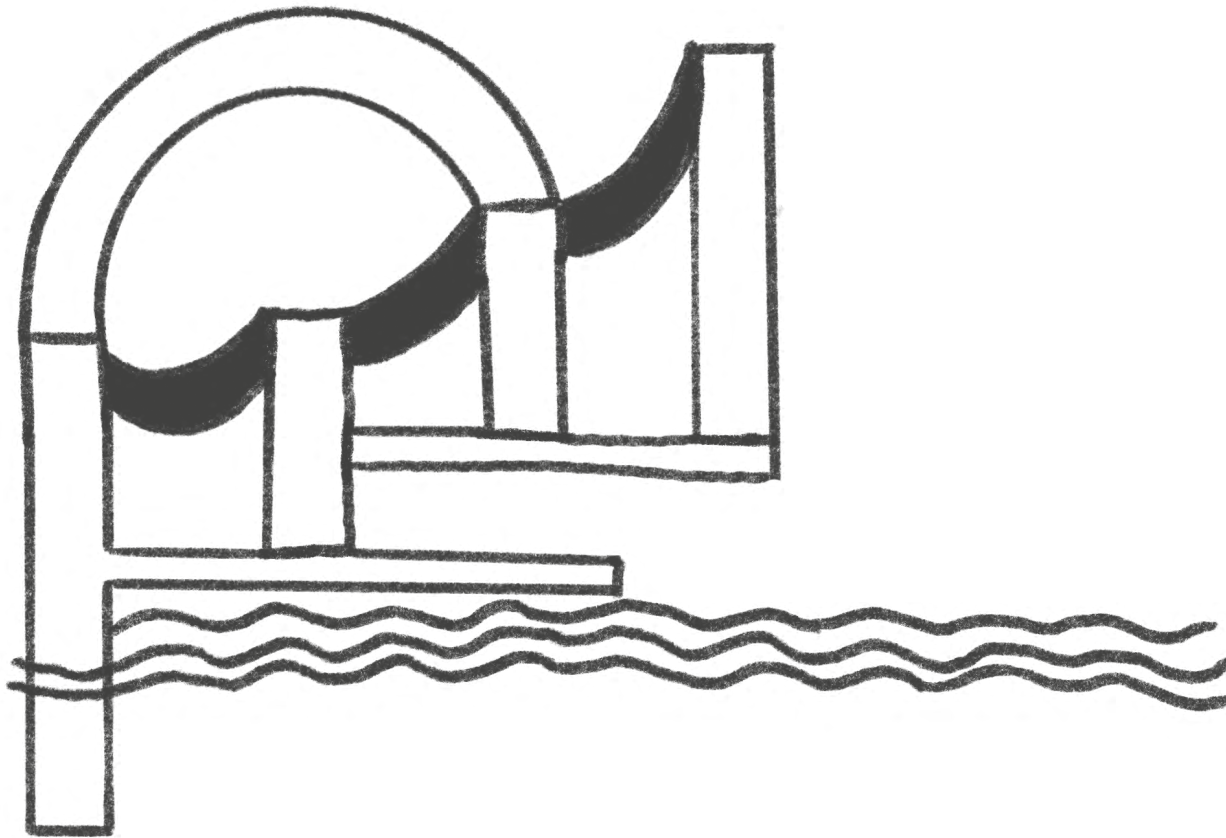
building  
bridges

In the early stages of the Forum, the groups agreed that policy should be approached as a form of storytelling. Like a compelling film, policy needs a clear beginning (vision), a middle (implementation) and an end (real-world outcomes). Through metaphorical bridge-building exercises, participants were asked to portray policy as a bridge connecting the present to a desired future. They outlined the steps needed to achieve their vision, categorising them as short, medium and long-term goals, sometimes including specific actions. Along the way, they reflected on the resources and support structures required to sustain progress, while also identifying potential threats to it.

While this framework is not exhaustive and cannot cover all the contributions shared during the final presentations, it focuses on the most pragmatic and actionable points for broader, collective impact.

This process underlined the fact that policy, like storytelling, requires both structure and flexibility. It needs a clear direction, but also the ability to adapt to changing circumstances. Crucially, the success of this vision does not depend on any one organisation, but on the collective efforts of all stakeholders. The diversity of European culture and children's film must be reflected in our advocacy and actions, with each actor taking responsibility for their role in making this vision a reality. As one group aptly put it: "Policy is us – a vision of children's film made real."





## 1 Short-term

### Mission Statement:

In the short term, the priority is to lay a solid foundation for a thriving children's film sector by taking immediate, actionable steps. Given the need to build momentum, this phase naturally focuses on a range of actions, as early progress is essential to achieve long-term goals. By engaging stakeholders, gathering essential data, and building robust advocacy networks, we are

paving the way for lasting impact. While KIDS Regio will continue its efforts, progress on a larger and more tangible scale will depend on the collective commitment of partners and stakeholders working together to ensure that the foundations for future success are firmly in place.

### Key Focus Areas:

#### Lobbying and Collaboration:

- Establish regional lobbying groups focused on children's film policies by collaborating with local film boards and cultural institutions.
- Organise regular meetings with policymakers to discuss the needs and potentials of children's cinema.

#### Data Collection and Analysis:

- Collect and analyse data to work on a clear definition of what constitutes children's film and so understand the needs and preferences of young audiences.
- Work with universities and research institutions to produce annual reports on different topics around children's film, such as its economic and social impact.

#### Strategic planning and visioning:

- Collect insights from existing projects to serve as best practices and share results.
- Develop action plans, timelines and impact papers that outline the changes needed in the industry to improve support for children's film.

## 2 Medium-term

### Mission Statement:

In the medium term, the focus is on both implementing actionable steps and achieving measurable goals to consolidate the children's film industry. This includes strengthening the infrastructure through strategic partnerships, expanding funding opportunities, and launching targeted marketing initiatives. At this point, the foundations laid in the short term should begin to bear fruit as efforts shift towards building more sustainable systems and ensuring the long-term potential of children's films across Europe.

### Key Focus Areas:

#### Strengthen lobbying and collaboration:

- Form expert working groups to address focus areas such as distribution, talent development, and film education and so ensure that these critical components of the children's film sector receive specialised attention.
- Expand and consolidate lobbying efforts and networks to ensure that the children's film industry has a strong voice in political and cultural discourse, respecting the principle of subsidiarity by addressing issues at the most appropriate level of governance – be it regional, national or European.
- Facilitate horizontal cooperation between stakeholders, promoting the sharing of resources, knowledge and expertise across sectors.
- Instigate more frequent meetings such as the KIDS Regio Forum – beyond the current five-year cycle – to ensure continued collaboration and momentum within the sector.



#### Securing funding and resources:

- Advocate for positive discrimination for children's films within funding bodies at all levels to ensure that they receive adequate financial support that reflects their cultural importance.
- Forge partnerships with private investors and international organisations to co-finance children's film projects, thereby extending financial support beyond public funding.
- Invest in innovative approaches, including co-creation with young audiences, to ensure that children's films remain relevant and engaging.

#### Launch marketing campaigns:

- Develop a pan-European marketing campaign, possibly involving celebrity and audience ambassadors, to raise awareness of children's films and their value to parents, educators and children.
- In parallel, launch communication aimed at the film industry itself to change the perception of children's films and encourage greater recognition of their cultural and commercial value.

### 3 Long-term

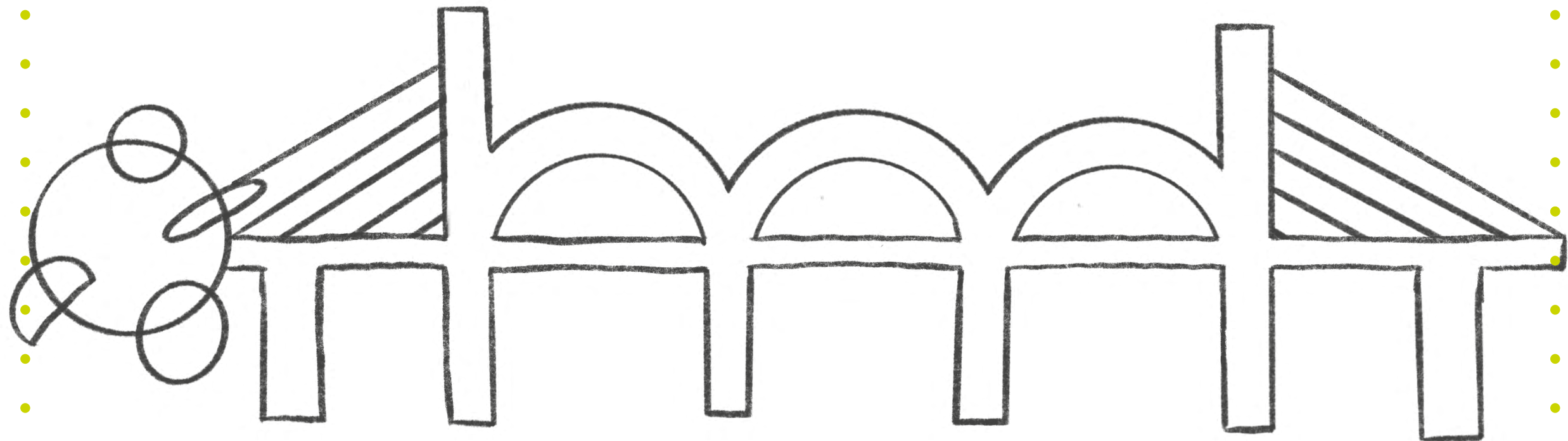
#### Mission Statement:

In the long term, the vision for European children's cinema focuses on achieving sustainability and recognition for its cultural impact and quality. By this stage, European children's films will be an integral part of local markets, with a well-established network of cinemas, distributors and filmmakers working in coordination across territories. The focus will be on maintaining these achievements, while securing continued political, financial and cultural support to ensure that children's films remain central to Europe's cultural identity. Continued advocacy and alliances will foster open dialogue with policy makers and industry leaders to ensure stable financial frameworks and adaptable policies.

#### Key Focus Areas:

##### Maintain and strengthen networks

- Establish children's cinema network(s) to coordinate between cinemas, distributors and production companies and so increase the local market presence of European children's films.
- Strengthen communication and cooperation with decision-makers and policy-makers to build a continuous support system for the advocacy of children's films at regional, national and European levels. Lobbying should be ongoing and supported by a pan-European alliance.
- Ongoing industry collaboration is maintained through more regular industry meetings, such as the KIDS Regio Forum, which facilitate exchange and alignment between stakeholders to ensure the sector remains responsive to evolving needs.



**Sustainable Financial Frameworks:**

- Positive discrimination policies for children's films will be implemented in all funding bodies, ensuring that children's cinema has equitable access to resources and is recognised as an important part of Europe's cultural output.
- Ongoing efforts focus on diversifying financial support, including partnerships with private investors, in order to sustain production and distribution pipelines.
- Continued investment in innovation, including new communication and marketing measures, remains a priority to keep children's films relevant and competitive in a dynamic media landscape.
- Adaptive funding mechanisms ensure that financial frameworks remain responsive to evolving needs, allowing for regular review and adjustment. This approach will ensure the long-term sustainability of children's cinema in line with future trends and audience preferences.

**Cultivate Film Skills**

- Expand the integration of children's films into school curricula and alternative education programmes across Europe, promoting film literacy and positioning children's cinema as both an educational tool and a cultural asset alongside their entertainment value.
- Introduce dedicated programmes in European film schools focused on children's filmmaking, ensuring that the next generation of filmmakers is equipped with the skills and knowledge necessary to produce high-quality content for young audiences.



## Threats



Policy Changes in  
Creative Europe



Shift in  
EU Priorities

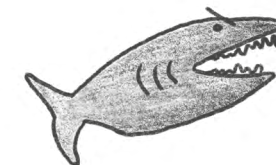


Global Issues



Anti-Regulation

Ignorance



Internal  
Competition

Conflicts of  
Interests

Far Right  
Policies



Big Tech Companies

Decreasing  
Budgets

## Spotlight on a Unique Bridging Initiative

### A EUROPEAN CINEMA NETWORK FOR CHILDREN

While the collective group discussions focused on broad goals for the European children's film sector, the 'Beanies' group took a deep dive into one specific project. Their idea demonstrates how concrete, actionable initiatives can emerge from broader conversations about policy, collaboration and industry development. This group developed the concept of a European Children's Cinema Network, inspired by the Swedish child-friendly cinema model. In Sweden, a network of independent and mainstream cinemas has come together to make cinema more enjoyable for young audiences by screening children's films and incorporating illustrations, merchandising and child-friendly design. They also prioritise accessibility, creating an inclusive environment for children's physical and emotional needs. Furthermore, it links cinemas with distributors, allowing for early exchanges and more coordinated activities in general.



The group aims to spread the idea across Europe, taking into account different regional regulations and funding structures, and so foster a lifelong love of cinema in children by creating welcoming, accessible spaces. Through collaboration and innovation, the network intends to ensure that every child in Europe can enjoy inclusive and engaging cinema.

#### Short-term

The initial aim is to engage with potential cinemas and regions in Europe, starting with pilot countries. Presenting a low-budget, adaptable model, the project will seek early supporters, raise awareness, and secure key stakeholders.

#### Medium-term

The group suggests organising a conference for representatives from different regions to share ideas and collaborate on child-friendly cinema initiatives, encouraging others to join the network and grow in stages.

#### Long-term

The vision is to create a broad European network, with a conference every three years to review progress, innovate and expand. By focusing on regional diversity, the network would adapt to local contexts and ensure that all children have access to tailored cinema experiences.

## Bringing it All Together

to infinity  
and beyond  
for young  
audiences

As KIDS Regio moves forward, clearly the work we have started cannot be sustained by one initiative alone. The success of the children's film sector in Europe depends on the active participation of many, from policy makers to filmmakers, and educators to distributors. The Forum has shown us that meaningful and lasting change must be a collective effort based on shared responsibility. It is this network of committed individuals and organisations that will ensure that the ideas we have discussed are not just aspirational but achievable. The diversity of perspectives we have gathered underlines one key message: real progress comes from everyone playing their part. KIDS Regio can be a catalyst, but it is the combined efforts of everyone involved that will make the difference.

The discussions and creative exercises that took place throughout the Forum helped to frame policy as an evolving narrative that connects people, ideas and institutions. Through these conversations, we have recognised that the policy work we do is part of a larger story – one that spans borders, languages and cultural landscapes. The Forum has shown that through collaboration and shared purpose, we can shape policies that reflect the values of democracy, diversity and inclusion. Policies that support children's film must evolve in response to the changing needs of our society. This adaptability is essential if we are to ensure that the sector remains vibrant and resilient for years to come.

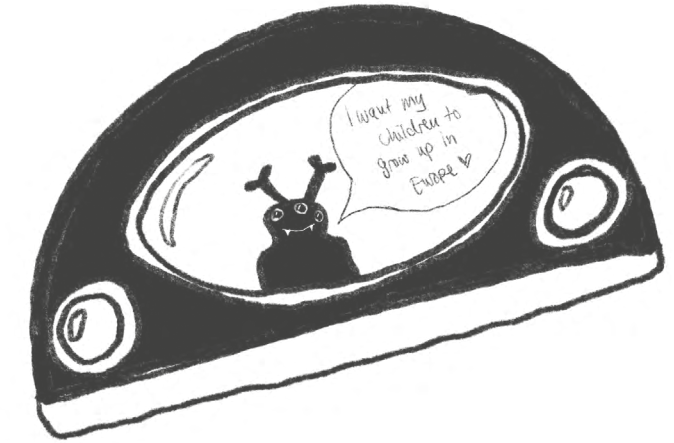
Reflecting on the rich conversations at the Forum, it is clear that there is a strong desire to build on this momentum. The seeds of this work are already bearing fruit. Our **post-Forum feedback meeting** was a direct reflection of this collective commitment. Held two months after the Forum, it provided a space for participants to continue their discussions, share progress, and support each other in their next steps.

In line with our shared vision, we have begun to prioritise the **sharing of knowledge and resources** to ensure that valuable work

is not isolated in pockets of Europe, but is available to all. One good example of this is the document that Edita Bilaver produced after her inspiring dialogue at the Forum, which we have shared with participants to support advocacy efforts in different regions. We are also working on the English translation of the Swiss Children's Film Strategy 2023 and materials from the successful Swedish Children's Cinema Network. These initiatives reflect one of the key takeaways from the Forum: we do not need to reinvent the wheel. Instead, we can pool our collective knowledge and build on what already exists, strengthening the foundation for future achievements.

Equally significant is the completion of our **research project "Keeping up with Children as an Audience"** in partnership with Will&Agency/pubikum.io. This landmark study, which spanned 12 countries with many partners and took over 18 months to complete, provides a detailed understanding of how children across Europe engage with film. Its findings are invaluable not only for filmmakers and industry professionals, but also for policy makers, who can now gain a direct insight into the minds of young audiences in Book 2 of this publication. Children's voices are often unheard in democratic processes, but this report gives them the platform they deserve. It is now up to the industry and policy makers to act on these findings and create an audiovisual landscape that truly serves its youngest citizens.

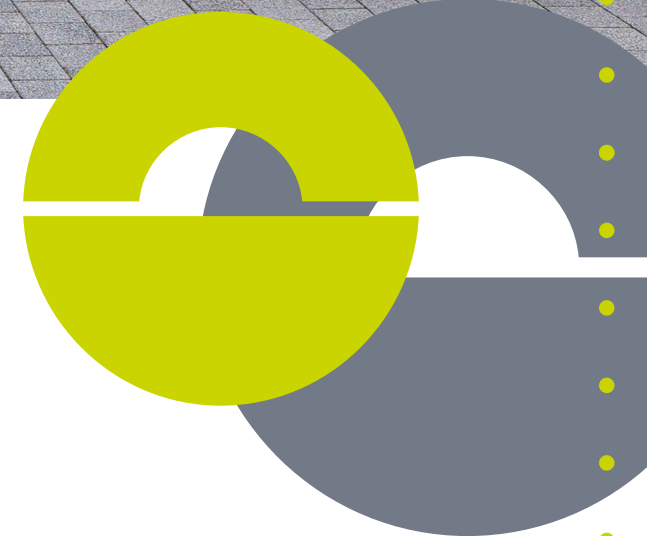
Data has become a key pillar of our advocacy. From the start, KIDS Regio recognised the need for solid data to support the case for the children's film sector. In collaboration with the European Children's Film Association and the European Audiovisual Observatory, we are making progress in **gathering comprehensive data on the production and distribution of children's films across Europe**. The Forum highlighted the need for this data at both the national and European levels, as many representatives lack the detailed insight needed to advocate for better policies, and we are already in the process of building this foundation, which will be explored further in Book 3.



As we look to the future, KIDS Regio remains committed to advancing the children's film sector through strategic activities and collaborations. Our efforts at both the national and European levels demonstrate that the work of KIDS Regio extends far beyond the Forum. It is an ongoing endeavour focused on building connections between the industry, policy makers and audiences and so foster a more inclusive and vibrant children's film culture across Europe. However, the real impact will come from collective action. While KIDS Regio continues to facilitate and inspire, it is the network of partners and stakeholders that will drive these initiatives forward in their respective regions and sectors. This shared responsibility is essential to ensure the sustainability and long-term success of the visions created in Erfurt.

With the momentum gained from the Forum, we will continue to move forward, connecting initiatives, sharing resources, and fostering partnerships that will keep children's films at the heart of Europe's cultural and educational landscape. We encourage you to explore Books 2 and 3 for further insights, data and inspiration to carry this mission forward. Together, we can make these aspirations a reality for the benefit of young audiences across Europe.

thank you



## Acknowledgements/ Imprint

Published by  
**KIDS Regio c/o German  
Children's Media Foundation  
Golden Sparrow**

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Development &  
Publication  
**2024**

**kids regio**

KIDS Regio would like to thank the patrons  
of the Forum as well as all the financial,  
organisational, foundation and other  
partners without whom the Forum would  
not have been possible.

Under the Patronage of the European  
Parliament and Catherine Trautmann,  
President of Eurimages.



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## BOOK 2

# Keeping Up with Children as an Audience A Pan-European Study on Children's Media Consumption

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# Key learnings: 10 take-aways

This report draws on insights from 374 children across 12 European countries, offering a glimpse into how films and series shape their everyday lives. The 10 key takeaways outlined below reflect the most significant observations and prominent themes.

## 1. Five years older, but worlds apart.

Between 7 and 11, the world of children changes significantly. With every year, their social and inner lives expand, resulting in their preferences quickly developing and changing. Where a 7-year-old can be perfectly happy simply 'watching something on a screen', an 11-year-old can have very strong preferences, likes and dislikes. Where most 7-year-olds love to play pretend, many 11-year-olds have become pre-teens thinking about their presence in the world. This development affects what feels relevant and what resonates with the target group in films and series. Across age and nationality, the research shows a strong tendency for children to quickly outgrow content that is made 'for them', as they are fast to deem it too childish. Thinking about the 7-to-11-year-old children as one target group can therefore be tricky. Even though there are only five years between the youngest and the oldest in the group; to keep up with them, it is important to remember that they are also worlds apart.

## 2. There are new definitions of film and entertainment.

Born as true digital natives in a global entertainment landscape, children today view screens as their primary gateway to media consumption. This shift has significantly influenced how young

European audiences perceive and define the concept of 'film', as well as their broader understanding of entertainment. To them, a film is simply another type of content accessible via screens, often experienced first in video format.

As a result, children tend to not consider artistic, narrative, or conceptual definitions of film. Instead, they view films as just another form of content accessed through technology – essentially longer videos available on streaming services, conveniently positioned alongside other apps like YouTube and TikTok.

## 3. New gateways to curiosities influence what children choose to watch.

The young audiences are used to an accessible and seemingly endless stream of content and have thus learned to be picky from an early age. They do not see themselves as passive viewers but rather as active and curious consumers who share a clear understanding that they can access the endless world of entertainment. The AV-landscape is competitive, and children navigate it through strategies such as assessing thumbnails, watching previews or trying out the first few seconds. This way, they feel they can maintain agency in choosing from the bigger shelf of content. The last thing the young audience wants is adults choosing what is interesting for them. For the young European audience, streaming and social media platforms often become gateways to dive into their curiosities, but also places where they shape their preferences. Of course, the extent to which children have access to these platforms changes depending on country and age. However, generally the European children utilise and add to online infrastructures as a means of engaging with their interests, and this ultimately influences what the children like and choose to watch when it comes to films and series.

#### 4. Stories about children, not for children.

According to the young audience, the worst thing a film can be is “childish” or “for children”. As such, the label ‘children’s film’ is challenged, as the children themselves are constantly looking up while searching for more complex narratives and characters, where repetitions in stories and plots often are perceived as childish. The children in the research love to watch stories about young characters, preferably a little older than themselves. However, if it becomes too visible that the film or series is made “for them”, it can quickly become a turn off.

#### 5. Genre mixes are in high demand.

The research shows that children today do not gravitate towards traditional genre films. Instead, they seek out stories that blend multiple genres, such as comedy, adventure, and action. They are drawn to content where the boundaries between genres are blurred, and various narrative elements seamlessly combine. This preference reflects their desire for diverse and dynamic storytelling, where the constraints of a single genre do not limit their engagement or imagination.

The appeal of a good children’s film, according to the children themselves, lies not in adhering to a specific genre, but in incorporating a variety of story elements that can cater to different tastes and interests within a single narrative. By mixing elements from different genres, these films offer a rich and multifaceted viewing experience. This approach allows children to find and connect with aspects of the story that resonate with them personally, giving them a sense of agency and choice in their entertainment consumption.

#### 6. Characters before plot.

When talking about what drives them in their films and series engagement, the young audience is quick to talk about characters before the overarching narrative or plot. For them, the specific events of a story seem to be less important than the presence of relatable characters who face and overcome challenges, learn new skills or experience a growth. This emphasis on characters is evident in the way children connect with emotionally complex individuals, and just as European children undergo significant and impactful changes between the ages of 7 and 11, they expect the characters in their stories to be in a constant state of development. Characters who remain static or “stuck” are quickly perceived as childish or unengaging and the young audiences seek stories that reflect their own rapid growth and transformation, featuring characters who evolve and adapt. This continuous character development is crucial, as it resonates with the tempo at which children themselves are changing.

#### 7. Emotional mirroring in elevated realities.

Children prefer stories that blend emotional realism with an elevated reality. They want relatable characters with genuine emotions and struggles, set in familiar yet fascinating environments. Elevated realities are seen as familiar settings but with a touch of magic or extraordinary elements, like an ordinary school with hidden magical rooms. This mix of emotional depth and captivating settings makes stories both meaningful and exciting.

They seek stories that reflect their own feelings and experiences but also transport them to worlds where the ordinary becomes extraordinary. This combination allows them to explore complex emotions within the safe, yet thrilling, confines of a fantastical setting. By catering to this preference, filmmakers can create content that resonates deeply with young audiences, balancing relatability with the allure of the fantastical.

## 8. A desire to discover, but not to be taught.

In terms of what they watch, the young European audience in general prioritises entertainment over learning. The children, however, do express a desire to learn, but they do not want to be taught. Rather, they seek content that is fun and engaging, where learning occurs organically rather than through direct instruction. In that sense, children want to maintain their agency in choosing their own learning objectives. A film should not explicitly depict what lessons children should go home with but rather leave space for the young audience to explore themselves.

Additionally, children appreciate stories that subtly weave educational elements into the narrative without making them the focal point. They enjoy discovering new information or skills as part of an engaging storyline. This approach respects their intelligence and curiosity, allowing them to draw their own conclusions and insights. By providing an entertaining context for learning, films can inspire curiosity and a love for knowledge without imposing it.

## 9. The film experience does not start at the cinema.

For children, streaming services are the primary gateway for consuming media, making home the central venue for watching films. At home, watching a film has become a social experience shared with family members. Most of the children respond that they mostly watch films with their parents, siblings, or the whole family, whereas only few of them respond that they watch films alone or with friends. As such, watching a film together is an opportunity for family bonding, where everyone gathers around the screen to enjoy a film together.

The cinema experience is valued by children not only for the film, but also for the unique environment it provides. Children appreciate the novelty of snacks such as popcorn and the ability to concentrate on the film without distractions. Unlike watching on smaller screens at home, the cinema offers a larger screen, comfortable seating and the immersive atmosphere of watching in the dark with others, which enhances the social aspect of the outing.

## 10. Moving forward: more similarities than differences?

Looking across children from 12 European countries, the young audience is looking for the same things and displays the same tendencies when it comes to their film and series consumption. Differences in preference are determined by age rather than by nationality or gender, and while local nuances which shape country-specific preferences can be identified, altogether, the young European audiences share more similarities than differences.

Due to the general practice of dubbing children's films and series in many countries, the youngest segment of the children in this research does not differentiate between different countries since the characters speak in their native language all the same. In that sense, all children's media is experienced as local. When the children grow older and start viewing content with subtitles, they become able to differentiate between what is locally produced and what is not. However, this is not a bad thing. As the world of older children starts to expand, international content starts to peak their interests, and they seem to be more used to reading subtitles as they are developing this skill through their consumption of shorts on YouTube and TikTok.

# Method

The data collection for this research has been carried out between June 2023 and May 2024 and is based on a combination of qualitative and quantitative methodology, including ethnographic as well as digital tools. In total, 374 kids from 12 different European countries contributed to this research, and interviews with 18 children's film industry experts from the respective countries have been conducted.

The primary methodology for the research on the children's perception of films and series has been a qualitative approach through a combination of mobile diaries, focus groups and in-depth interviews. All expert interviews have followed the same interview guide, to make results comparable for all regions. To support the qualitative data with concrete numbers on the distribution, habits and preferences of the young audience, a quantitative survey across all participating countries was additionally set up.

Recruitment and outreach in the 12 countries were made possible through collaborations with local film initiatives and stakeholders. Thank you to all the participating stakeholders.

Despite this local expertise assisting the recruitment process it has to be accounted for a sampling bias that occurs when recruiting within an existing group of contacts, or the proximity of once conventional audience. This does not mean that insights and tendencies are devalued in any way, rather that socio-economic, and socio-political background factors of the respective communities that were given access and included in the research must be taken into consideration

# Introduction

"Keeping up with Children as an Audience" is a research project led by KIDS Regio and PUBLIKUM which re-examines the children's film landscape in Europe – through the eyes of young audiences. Through a comprehensive cross-country study, this research gives in-depth insight into the world of children's cinema. The aim of the research is to support and strengthen the work with children and adolescents in the film and media industries across Europe – both amongst policy makers, decision makers and practitioners in the fields of cinema culture and film. By offering new, deep insights into the young audiences, the research means to advance the understanding of how these younger generations of audiences navigate the global landscape of films and series.

There exists no consistent definition of the label 'Children's Film' within the industry, and as such an important part of this research has focused on how children themselves understand, experience and define children's film. As the title of this report indicates, the young audience navigates a global and rapidly changing landscape of AV-content, and in order to capture their attention and create content that feels relevant to them, an effort to keep up with them is required. By involving children aged 7-11 from 12 different countries, this research aims to tap into their unique perspectives and explore the significant role of film, cinema and fictional characters in their lives. The qualitative research has been carried out by PUBLIKUM, part of Will & Agency, a Danish company specialised in audience research and audience building. The research covers countries in all regions of Europe, providing a comprehensive understanding of European children's perspectives on film, as well as a deeper understanding of the challenges and opportunities for children's film across cultural borders.

This report is based on input from 374 European children representing 12 countries. All have shared their thoughts on what films and series mean to them in their everyday life. The conversations have covered everything from their definition of film to entertainment, to favourite characters. In all countries, local partners

working within the film landscape have contributed to reach the young audiences. The report contains both a qualitative and quantitative introduction into the life worlds of the European children in the age segment of 7–11 years. Furthermore, a total of 18 experts from the participating countries were consulted to obtain a deeper understanding of the children's film landscape and to assess how the children's responses fit within these local and European landscapes. Chapters 3–6 will go into the perceptions the young European audience has of film and entertainment, their likes and dislikes, and their viewing habits.

## THE FILM PRODUCTION LANDSCAPE: FROM UPCOMING TO NON-EXISTENT.

This research project means to provide insight into young European audiences' interests, preferences and habits. Of course, children's viewing habits and possibilities are embedded in a local children's film landscape. They can only watch what's made available to them, and what's available differs from country to country. While across Europe, experts point out that only few children's films are locally produced, there are clear differences between the participating countries. Smaller European countries such as Montenegro and Wales, as well as southern European countries in general, appear to have little to no local production of children's film – especially when it comes to publicly funded films. Often, separate funding mechanisms for children's film within the larger local film funds are non-existent, as is the case in Poland and Estonia. This means that children's films are few and far between. In Montenegro, for example, as one expert highlights, the first publicly funded children's film is yet to be released, and one of the Portuguese experts explains that it has been 15 years since a publicly funded film has come out in Portugal. Although not implying that there is no production for children at all, this does mean that local films aimed at children in these countries generally have a commercial approach – if they are even made at all.

Northwest Europe generally appears to have a more robust children's film landscape. Currently, Norway, Germany, and Belgium have various types of funding specifically aimed at the production of children's films. The Dutch Film Fund also regularly funds children's film production. Related to this, experts from these countries also point out how there are more films aimed at the young audience coming from these countries. Norway, especially, is active when it comes to children's film production. In the Netherlands, several films are produced per year as well, and in Flemish Belgium at least one children's film per year gets funded by the Flemish Audiovisual Fund.

However, this does not mean that there is no investment at all in children's films in other parts of Europe. Regional experts explain that investments in Wales, Portugal, Italy and Greece are mainly related to distribution in terms of showing film in schools and establishing the role of film in education. This could point to a different perception of the role of film across Europe, with certain countries (or at least their governments) approaching children's film mainly as a part of education, whereas others appear to approach it more as a combination of entertainment, art, and education.

Even though the children's film environment is distinct in each country, this research will show how across Europe, the young audiences share more similarities than differences. Altogether, the results presented in this study will help fill a long-standing gap: what truly constitutes a European children's film in the eyes of the audience, and how can these films effectively cross borders in an era of diverse cultural socialisation and global content communities? By providing insight into the similarities and local nuances regarding the young European audience, this research hopes to foster closer connections between filmmakers and their young audiences, leading to the creation of more culturally diverse and globally resonant children's films.

## Participating countries

The participating countries are Belgium, Estonia, Germany, Greece, Italy, Montenegro, Netherlands, Norway, Poland, Portugal, Switzerland and Wales. In total, 374 children between the ages of 7-11 years old represent these countries, giving insight into the Europe-specific perspectives. Whilst this report aims to give a voice to children specifically, it also includes data from interviews conducted with 18 industry professionals from all participating countries. Additionally, the qualitative data is supported by quantitative insights as well. The data distribution is further explained in chapter "Method".

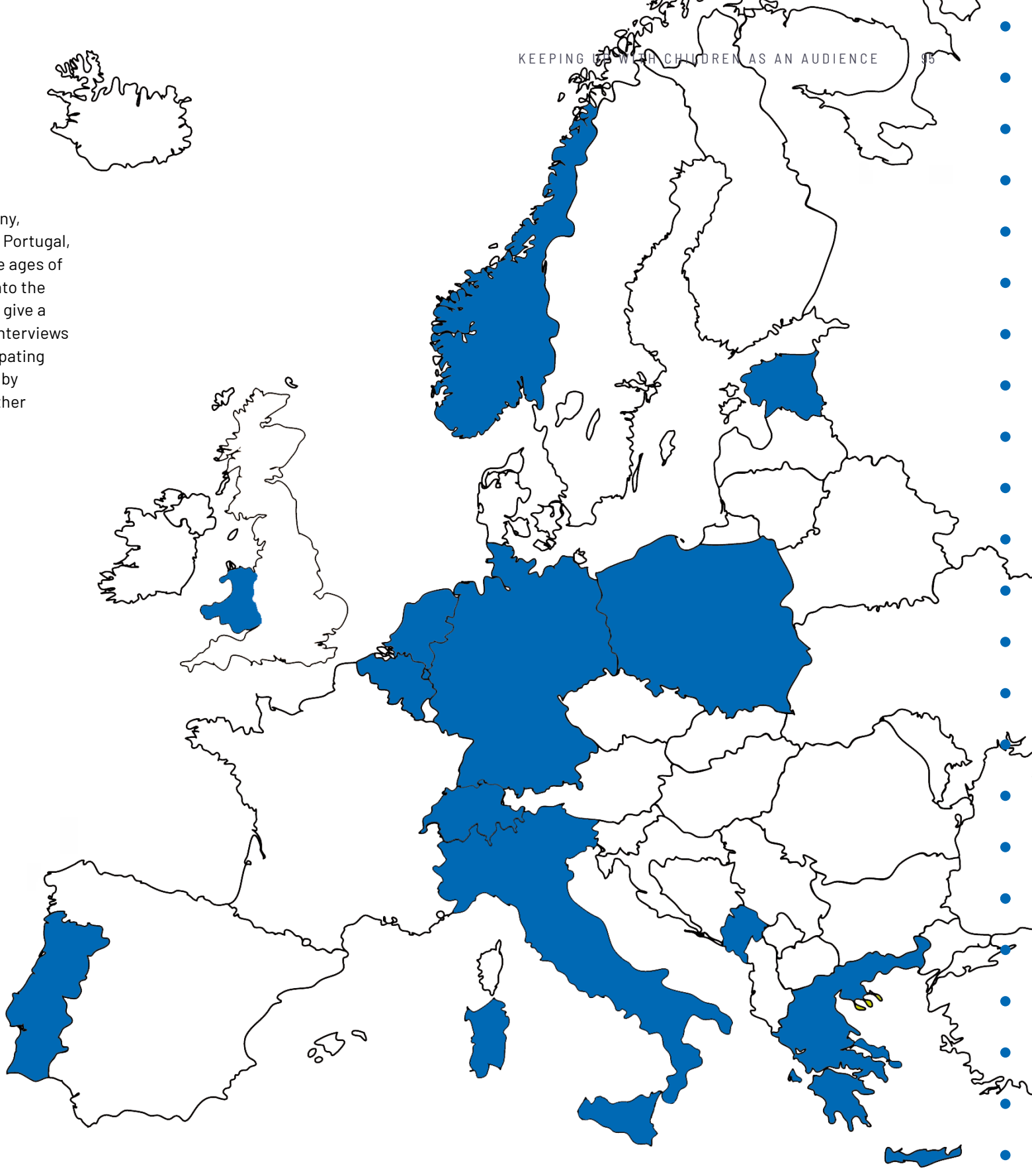


Figure 1: Map of participating countries

# Introducing the 7–11 Year Olds

To keep up with the young audiences, it is vital to keep up with them as humans and individuals and not only as consumers. What interests them? Where are they in life? What do they like? While a 5-year period might not seem like a lot, the changes children go through between 7 and 11 mean a world of difference when it comes to their development, interests and preferences. Whereas a 7-year-old might be excited to play pretend, some 11-year-olds are already in high school and almost feel as if they are closer to the world of the adults than that of the children. Although there are slight differences in age-related milestones and the perception of growing up in the participating countries, the general transition children go through during this time appears to be universal. While keeping the local circumstances in mind, this chapter will paint the bigger picture of the world of European 7–11 Year olds.

## ONLY 5 YEARS OLDER, BUT WORLDS APART.

The life worlds of children aged 7 to 11 are dynamic and transformative, marked by significant physical, cognitive, and emotional development. When creating content for these age groups, it is important to be curious about who these children are and what their lives look like, while realising that only in very few cases they can be considered as one homogenous group. Highly aware of their own development and the ways their preferences and viewing habits change, the older children especially are quick to point out how the differences between the ‘small children’ and them are enormous. As they navigate the middle years of childhood, they move beyond the dependency that characterises early childhood and towards greater independence, all while developing a more nuanced understanding of the world around them. This is also reflected in their media habits and the research shows that there are more similarities between age peers across countries in Europe than between different age groups within the same country. Between

7 and 11 years old, a lot changes. This is why within this age group, children differentiate between themselves and children of other ages, specifically those who are younger than them. Children have an awareness of these different age segments; there is “me”, “us”, and “the others”. In fact, a difference of only months can make up an entirely new audience group, as this quote from an 11-year-old girl explains:

*Wait, the worst movie I've ever watched is... Well, when I was 9 years old, I used to say that movie would be perfect, but now I say that movie was very boring. And that movie was Frozen.* Girl, 11 – Montenegro

As the quote indicates, not only self-perception changes with age, but also the self-awareness and reflections on what is ‘age-appropriate’.

Considering the different school systems in the participating countries, the difference the older children perceive between them and the younger group, also makes sense. In many of the countries, this age bracket covers the entire elementary school period. And in some countries, children will even switch schools during this time. In Germany, for example, 11-year-olds will already be in the first grade of high school. Switching schools or being ‘the oldest’ in their primary school will influence the way children see themselves – especially in relation to children younger than them. Life worlds, then, are not solely dependent on age but also on the school system children find themselves in.

During this time, which usually spans their entire primary school life (or more), the way children experience the world changes rapidly. Because of this, there are vast differences across the age

groups when it comes to the types of content they are exposed to and interested in. Generally, the children's responses indicate that where the youngest group is mainly focused on playful exploration and has a broad interest and openness to all kinds of content, the older group has developed clearer preferences. They have started thinking more about their own identity, the way they are perceived by others, and how their interests relate to those of their friends. Because of this, the older children explain that they, for example, prefer to watch films with good reviews or which have recently come out. We see that with age, preferences start to develop. Children start to think about whether something makes them laugh or whether they find it too childish. Although they have different strategies for it, as they grow up, all children start to consider: what do I like about this? In these scenarios, young children are very conscious of their personal criteria for choosing a film to watch.

*Well, I have many ways to decide that I'm going to watch that movie. First, I ask myself about that movie, what the movie looks like, what the movie sounds like, whether it's a child movie, whether it's an adult movie.*

Girl, 11 — Montenegro

*My favourite film is Jurassic World because I like dinosaur films and evolutionary films.*

Boy, 9 — Switzerland

During this period, the 7-to-11-year-old children's social interactions also change and become more complex as their cognitive abilities expand rapidly. Within these years, they begin to form deeper friendships, engage in cooperative play, and are increasingly influenced by peer groups. This age range is also characterised

by a heightened curiosity and a drive to explore new concepts, both academically and socially. Schools play a central role in their lives, serving not just as educational institutions, but as arenas for socialisation and personal growth. As such, the role of friends and family changes throughout these five years. For the 7-year-olds, life still mainly revolves around their family unit. Although friends start to play a bigger role, friendships are mainly about who you can play the best with. In the perspective of the youngest group, the world revolves around themselves: they like to play with someone (or not) and do not yet think so much about the way others see them. For the oldest children, on the other hand, friends have started playing a much larger role. While family is still important to 11-year-olds, their perspective shifts from 'me' to 'us'. They are more reflective of the ways they relate to others — both family and friends — and are busy exploring their own identity and positioning themselves in relation to other people.

## BEING BORN IN A GLOBAL ENTERTAINMENT SYSTEM SHAPES THEIR MEDIA UNDERSTANDING.

From their responses, it becomes clear that children across Europe — no matter their age — are born into and grow up in the same global entertainment system. Influenced by social media and streaming platforms, they come into contact with similar content which they consume in similar ways, no matter where they live. Unlike other 'younger' generations, such as millennials and generation Z, many of these younger children also have parents who are fluent in new media and online platforms. This means that both films that they choose to watch themselves, as well as the content that is presented to them by their parents, are generally rooted in this global entertainment system.

While across countries, there are differences in the preferences for genres and formats, the distribution channels that reach children of this age are very similar across Europe. Overall, the most common on-demand streaming services are used across the board, with Netflix and Amazon Prime at the top and followed by streaming services like Disney+ and HBO. YouTube is also highlighted by the children as an important source of video content as well, where they mainly watch short video formats and content that is neither studio produced nor animated.

*Netflix and Disney Plus, I've got both, yeah.*

Boy, 8-9 — Wales

Interviewer: *How do you choose which movies to watch?*

Boy: *I choose it on Netflix or on Disney.*

Boy, 8 — Portugal

Many of the children mention not only what they watch, but also which streaming platforms they use to watch it on, often making a list of all the ones available to them. The majority of the children in the research have access to at least one platform.

## NORTH AMERICAN TITLES ARE DOMINANT — BUT CHILDREN ARE NOT ALWAYS CONSCIOUS OF THE DIFFERENCE.

Access to numerous streaming platforms, most of which are based in North America, means that children all over Europe have abundant access to American titles primarily. Because of this, children watch American content all the time. Participating children across Europe regularly mention watching titles such as Wonka and Kung Fu Panda, as well as older Marvel, Disney and Disney Pixar movies.

*My favourite movie is currently Willy Wonka. Because I really like it. It's a dream movie. And it's a lot of singing that I like here and there. And I like the main character. She is also very talented. And that's why I like it very much.* Girl, 11 — Estonia

Interviewer: *When was the last time you went to the cinema?*

Girl: *Last weekend.*

Boy: *Four weeks ago.*

Interviewer: *What film did you see?*

Girl: *Erm, the Wonka film.*

Boy: *\*laughs\* Wonka film.*

Boy & Girl, 8-9 — Wales

When reflecting upon their favourite titles, local productions do not seem to appear as easily on the children's radar. One important reason for this can be that in most of the participating countries, local production of children's fiction films is basically non-existent.



Figure 2: A map of favourite titles as highlighted by the children in the research

In addition, not only children's film or family films appear when they mention their favourite films, which suggest that the age group are busy exploring films and stories that are not meant for them, yet still appeals to them. Figure 2 shows the titles that were mentioned the most as favourite titles across the participating children, showing how the film landscape mainly consists of international blockbusters, often meant for older age segments, yet also show an interest in local and non-American content.

Growing up in a global entertainment world that in many ways seems endless, naturally affects how the young audiences pick and choose from a global pool of entertainment. Here, it is often a question of what captures their attention and interest and makes them curious. The following chapters will explore how the young audiences find interest in stories, genres and characters, and how

they in general understand AV-entertainment. However, by having a place in a global entertainment world, the children do not seem to reject or dislike content coming from different places than their own home country. So, although competing with big-budget Hollywood series and films can be a major challenge for European filmmakers, there is a promising interest – at least from the children – in films made in other countries and in different styles than they might be used to. Not only American titles. For example, several children in the research talked about watching Japanese films and shows, while others pointed out having watched and enjoyed French animation films.

Interviewer: *Naruto is your favourite film. Do you know which country it's from?*

Boy: *Either Japan or China. I think it's from Japan.* Boy, 8 – Portugal

Recently, a study<sup>1</sup> funded by The Danish Film Institute also showed how K- and T-drama films and series have become relevant to a Danish teen audience, who have encountered this type of content through TikTok and YouTube communities.

Looking at the differences between local and global, this research shows that for many children – especially the youngest – the lines between what's local and what's not are blurred, as content aimed at them is often dubbed, meaning that children are not particularly aware of where films and series come from. To them, there isn't a big difference between a film that comes 'from Portugal' or 'from Germany' or is 'in Portuguese' or 'in German', and they do not actively dwell on the origins of the films they watch.

1 "Close Up: a study of 7-18-year-olds and their lives  
with films, series, and social media"  
<https://www.dfi.dk/branchen/viden-om-publikum/close-study-7-18-year-olds-and-their-lives-films-series-and-social-media>

## FOR BETTER OR WORSE, EASY ACCESS TO GROWN-UP MEDIA BROADENS CHILDREN'S HORIZONS.

Children's digital savviness combined with the nearly endless array of content available on streaming platforms, means that the children in this age group will generally also watch a lot of films and series that are not specifically made for them. When asked about their favourite films, many of the children mention films classified for age 12 and up. Clearly, 'children's films' are by no means the only type of film that reaches children. To put a number to this: according to the Danish Film Institute, nearly 18% of Danish children between 7 and 14 have watched *Squid Game*, a show rated 16+ in Denmark.<sup>2</sup> While children have a tendency to look up to older age groups, and have always been interested in content not aimed at them, the level at which this happens now indicates that the distinction between what is meant for children and what isn't is fading away – at least from the children's perspective.

## IN AN ON-DEMAND WORLD, SOPHISTICATED DECISION-MAKING SKILLS DEVELOP QUICKLY.

Almost none of the children in the research speak about films and series as something that is presented to them, but rather see it as something chosen by them. To children this age, film and series generally come on-demand and they have extensive knowledge about the different streaming formats. The global entertainment system, then, allows for their own choice and control over the content that is being consumed. Moreover, it gives them tons to choose from. Having access to a variety of on-demand streaming services that are mostly very similar and all offer countless films and shows to pick from, has made children capable of making very nuanced choices about what they like and dislike from a very young age.

<sup>2</sup> <https://www.dfi.dk/branchen/viden-om-publikum/hvor-mange-boern-ser-film-og-serier>

*First question is what is your favourite film or series and why? Right now, it's Outer Banks from Netflix.* Girl, 10 – Estonia

Boy 1: *What's your favourite film of all time?*

Boy 2: *Avatar The way of Water. What's your favourite film of all time?*

Boy 1: *My favourite film is Mission Impossible. Because you do not know what's going to happen next, and it's funny because no one can find him.* Two boys, 8-9 – Wales

In addition, the participating children appear to feel completely familiar and comfortable with all kinds of digital technologies, which corresponds with trends found in European statistics on online streaming habits across Europe with older audiences. For example, Eurostat writes how "in 2022, internet streaming habits revealed a generational divide within the EU. Online streaming was particularly popular among young people, with 86% of individuals aged 16 to 24 years and 81% of those aged 25 to 34 years using the internet to stream TV or videos."<sup>3</sup> Although the age group of 7 - 11 has not been taken into account in these numbers, statistics show that younger people are the primary users when it comes to streaming platforms. And undoubtedly, the children participating in this research project show that they feel at home on all different streaming platforms. This includes YouTube which is often mentioned by the children as a great source for videos and online entertainment content.

<sup>3</sup> Eurostat: <https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20240415-2#:~:text=In%202022%2C%2065%25%20of%20individuals,%25>

## CHILDREN OF THE DIGITAL AGE ARE MASTERS IN MEDIA LITERACY.

Being rooted in a global entertainment system has made children extremely well-versed in all things media-related. When it comes to film, the 7-11-year-olds demonstrate a very strong vocabulary and many appear to understand the filmmaking process, the technology and the industry at least to some extent. Having access to media from all across the world, means they are tapping into global culture communities, where they are able to pick up knowledge that can appear beyond their years. For example, many of them know what CGI is, how “character development” works and express an awareness of the international movie canon, for example in referring to Studio Ghibli films. There also appears to be some tendency with children to focus on actors and directors, knowing their names and knowing what films they have been in – a tendency that makes sense, considering the (social) media landscape the children grow up in is strongly based on influencers and famous personas.

*I like to watch the creator Toshio Suzuki. And my favourite movie of his is Spirited Away.*

Boy, 10 – Belgium

*So I like Tom Holland, who plays Spider-Man. Chris Pratt, who plays Star-Lord. Chris Hemsworth, who also plays Thor.*

Boy, 9 – Germany

Furthermore, they seem to be aware of the overall mechanics of creating a storyline or are at least able to decode them easily – even if they do not always have the specific words to talk about it. They are aware that films are created and have no difficulty discerning between what is real and what is fake.

*A movie is something you watch. The actors reproduce the story, they have to practise a lot so when the movie premiere day comes everything goes well.* Girl, 7 – Portugal

*And I do not like it when the bad guy dies, because if the bad guy dies, then you can't make another film. Because then, in Avatar, in the end, the bad guy doesn't die and then they're probably making a third film for that.*

Boy, 9 – Germany

The film literacy eventually affects the film experience, as for some of the children it becomes yet another parameter by which they assess the films they are watching.

*The worst film I've seen is Sharkboy and Sharkgirl. It was actually a very boring film. And it was also very badly edited. And the CGI, it was very bad CGI. So it was just bad film, bad story, bad characters, bad animation, everything was bad.* Boy, 11 – Norway

*I like to watch action movies or exciting movies. I also like superhero movies because I also read the comics like that, especially from DC. But they also have to be good because there is not too much CGI.* Boy, 11 – Germany

# What is film according to European children?

One of the central research questions in this study has been to explore how children themselves understand, experience and define children's films and films made for them. The globalised and mediatised world in which children nowadays grow up, does not only influence their interests and preferences – it also shapes the way they view film as a medium. For children aged 7-11, 'a film' seems to hold a slightly different meaning to previous generations, so before exploring what resonates with them in films, it is important to understand their overall concept of film as a whole. When it comes to understanding what a film is, there is a significant difference between the perspective of older generations and that of the youngest. Whereas Generation Z and up have grown up with the concept of film, which was then revolutionised by short-format content on social media, children aged 7-11 experience film the other way around. Short, quick, upright videos dominate the online landscape that they interact the most with. For them, understanding film starts with understanding video, as the short format is what they are familiar with before 'transitioning' to longer formats.

While there are slight local differences in the way children understand what film is (and specifically, what a children's film is), the direction and development of their understanding is the same across countries in Europe: first comes the video, then the episode, then the film. This makes sense, considering that they are all part of the same global entertainment system, which has likely created a more similar understanding of film across borders.

## SCREENTIME, RATHER THAN STORYLINE, DEFINES FILM FOR CHILDREN.

It is striking that, when the participating children talk about what they think a film is, they show the same patterns of understanding: they will rarely start at the story or the visuals. Instead, their point of departure is the screen. When considering films, children will think about the different types of screens that facilitate watching movies. This focus on screens signifies the central presence of devices in their daily lives. For children in this age group, then, film is less of an artform or concept. Rather, it is something practical, which they receive through technology – at least when they initially think about it. In that sense, film is not so different from the other types of content that they are used to watching. It simply takes place on a phone or tablet or possibly a larger screen, amongst apps, social media, YouTube, TikTok, streaming services, etc. Children across the 12 European countries share a similar point of departure when explaining what a film is: something on a screen.

*A film is electronics on the screen. And when you are at home and you have a TV, you can watch something on the screen. You can call it a TV. And when you are in a cinema, for example, in a gallery in Warmińska, there is a big cinema and there is a big screen.*

Boy, 8 – Poland

*I would explain, for example, you can watch it on a screen, for example on a laptop, on your TV, on your phone. And then it's just a screen and then you can watch what you want, adventure movies, drama, a bit of drama, I think explains it anyway.*

Girl, 11 – The Netherlands

*A film is actually something on the TV or on a screen, which certainly takes more than one hour or a little less than an hour. And that's a story. And that can be with real people or with drawings, with things that are drawn or stop motion. We usually watch movies on the TV, very often in the cinema and very often on the iPad.* Boy, 10 – Belgium

Interviewer: *But what is a film?*

Girl: *It's something we watch in the evening.*

Interviewer: *Yes, we watch it in the evening, but what is a film?*

Girl: *It's a kind of cinema, but on a screen.*

Girl, 8 – Italy

Because of this, many of the children see film as more of a habit or a routine, something that they 'normally watch' at a certain moment or with certain people. Moreover, like all other media they are used to, film is on-demand: in principle, they choose what and when they watch (unless they watch together with other people).

However, this does not imply that they do not see film as an art- or story-form at all. It simply means that in their hierarchy of understanding, the technology of the screen takes first place – this is how they experience film. The story is second to that – it is definitely an essential part of what a film is but it is not the main characteristic.

Besides story and medium, a defining characteristic of film that distinguishes it from other art forms is length: from the children's perspective, films take a long time to watch. Considering that the default content they watch consists of short videos (series,

YouTube, Instagram etc.), the length of a feature film can seem daunting to children on the one hand, although there also seems to be a sense that the length of film makes it a more grown-up medium. Importantly, this says a lot about their understanding of the movie landscape: online videos are not short films but instead films are a type of video content – though a very long one.

*A movie is sort of a long video that has a script, directors, and actors. If it's an animated film, you might not need actors.*

Boy, 11 – Norway

*I would explain to a friend that a movie is an hour-long video that sometimes includes scenes that are a bit made-up.*

Boy, 10 – Norway

*Actually, just a video that is very long.*

Boy, 9 – Germany

## THE WORST THING A CHILDREN'S FILM CAN BE IS CHILDISH.

Across age and nationality, the children that have participated in this research agree that a movie made for children differs, at least a little, from a movie made for adults, but they also firmly believe that this does not mean that stories should be dumbed down for them. In their eyes, the worst thing a film aimed at children can be is childish. And as children in this age group grow up quickly, something that they enjoyed when they were 8 years old might already be childish the moment they turn 9. Generally, across age groups, the children express a desire to be taken seriously. Films

can be about children but the moment that they are very clearly made for children, it is easy to lose interest. Here, the research shows that the children often overestimate themselves and their own maturity, as they generally feel a little more mature than their years, meaning that something that's not childish will be something that's aimed at children slightly older than them – or even at adults.

*Interviewer: What is the worst movie you've ever seen?" Girl: We had to watch Little Einsteins. And that was so stupid. Because the head was half as big as his body. And that's huge. He could talk. And that was very stupid.*

*Interviewer: But what was stupid about it?*

*Girl: Well, that's not for children of seven or eight. Oh, it was a bit childish.*

*Girl, 8 – The Netherlands*

*Interviewer: And what is the worst movie that your parents, teachers and guardians decided that you have to watch and why?*

*Boy: The Red Riding Hood. I can't stand it.*

*Interviewer: And why?*

*Boy: Because there is something like...*

*...For the Babys! Boy, 9 – Poland*

*What was the worst movie I've ever seen? I think it was The Loud House Movie. I do not think it's a bad movie, but I thought it was childish. Girl, 11 – Belgium*

*I really do not like Mickey Mouse because it's simply so baby-ish, and also the way they talk is just like small children. Girl, 11 – Germany*

## THE RECIPE FOR CHILDREN'S FILMS IS A FILM ADULTS WOULD WATCH, BUT LESS SCARY.

When the children talk about what they think a children's film is or rather what it should be like, they are clearly looking for a little bit of everything. The recipe for a children's film, then, should be a balance between all kinds of different components and cannot be made up out of one ingredient only.

*A good movie for me is one that has action, a little anxiety, a little fear and has a funny and smart character. Boy, 11 – Greece*

Here, they often turn to the films they watch with parents or older siblings for references. For example, a good children's film is challenging and lets the children engage in more complex storytelling while not being too complicated. It has action and tension but never becomes too gruesome. For children, this is the main thing that distinguishes children's films from films meant for adults: they are basically the same, but a little less scary. In this sense, children often do not feel that films aimed at children are meant for them. In their eyes and regardless of their age, films made for children are made for children a little younger than them – after all, they are almost grown up themselves. This can explain why they constantly search for films that are not as predictable as children's film, but rather a combination of excitement, entertainment and humour.

*Something that children can just watch. Because it's not too scary. And also not too boring. There has to be something funny or exciting. But not too funny. But also not too exciting. Girl, 8 – The Netherlands*

*I would say that children's movies are children's movies, and that there is nothing so scary about it. Of course, there is something funny, some comedy, there is a little something scary, but not so much. There are some adventures, I am most interested in them.*

Boy, 8 — Montenegro

*The worst children's movie I've seen was in school, because it wasn't dramatic and not exciting enough. And you could actually predict what was going to happen right away*

Boy, 11 — Germany

*For me, a good, ideal film is one that has action in it, but not films where it's just, I don't know, one car chase after another in the whole film. For me, the film also needs a story*

Boy, 9 — Switzerland

# Genre, story and character preferences

Diving into what draws the young audiences' interest in films and series, children seem to pay a lot more attention to characters than to genres and overarching storylines, across both age and nationality. This section will explore what resonates with the participating children and what they, in fact, enjoy to watch, when they get to choose for themselves.

## Genre

Children do not think in genres, but do use them to express story desires.

As mentioned earlier, the participating children demonstrate a high media literacy when it comes to talking about films and other media. However, differentiating between genres is not one of their main concerns. The young audiences do not express their preferences in terms of genres and neither seem to be genre fans nor loyal to genres. According to them, a "good" children's film also does not stick to one genre, but instead incorporates many different genre elements.

*It should be an action movie, with drama and a bit of horror. With animated characters and animals. It would be set in the future, in the city with a really weird flying car with no wheels. There would be some people who wanted to kill people from the other planet, but others tried to avoid any kills.*

Boy, 10 — Portugal

When articulating their criteria for a film that appeals to their age group, it is notable that children mention a diverse range of elements that the film needs to encompass. Interestingly, these elements are primarily described through their emotional reaction rather than something genre-specific. For example, while the children express a desire for humour and entertainment, they do not explicitly label these films as comedies. Or they search for suspense and action, but they are not necessarily looking to watch action films.

While searching for a good mix of elements and emotions, the young audience is clear on the fact that humour should always be prioritised in a film made for their age group. For the youngest group of children, fun is often the only selection criteria, but it remains an important part also for the older children. Here, however, the data indicates a difference in what children understand as humour. The youngest often search for physical humour or grimaces, where the older start to search for dialogue-based humour.

*It should be funny.* Boy, 10 – Greece

Interviewer: *How should a movie look?*

Boy: *It should be beautiful and something magical and something funny.*

Boy, 7 – Montenegro

*A good film is... It's funny.* Girl, 11 – Estonia

## Story

### MORE IS MORE, LESS IS A BORE.

Growing up in a seemingly endless media landscape and being bombarded with information on a day-to-day basis, children today have quickly developed tactics for navigating the stream of content on different platforms. The children are used to a lot of stimuli, which translates to them being able to digest much information at once and they are accustomed to a high tempo. Many of the children explain that films where “nothing happens”, the stories are “too long” or where the tempo is “too slow” struggle to prove its relevance to them and risk to bore them. The research shows how the vast part of the participating children is actively searching for narrative complexities. In fact, these more elaborate plots, full of events, action and adventure, are the ones that the children gravitate towards. For children, more is more, and they are ready for it.

*A movie for my age would explain to an adult that it should not be like someone is being killed, but that there are some interesting situations and that there are as many events as possible.* Girl, 11 – Montenegro

The children's preference for constantly evolving plots mirrors their own ongoing development. Between 7 – 11, the world of children is growing. Their curiosity for the world around them grows, while they also become more conscious about their own inner lives. Being invited into new, complex and elaborate story worlds caters exactly to their desires for exploration. In addition, their social world is also expanding, meaning that they look for stories which include the social life of characters. Here, it is noticeable that many of the children express a desire to watch content where they can mirror themselves and their friends, but preferably in settings that offer some sort of surprise or fascination. To many of the children the ability to identify with the characters is important, but it is

easier and more interesting if the story does not resemble their own everyday life too much.

*The best children's film I've seen is Shrek. Why is that? Because Shrek, exciting film, very funny. You can also think about, when you see the character, you can also think about yourself. Because the character kind of has the same problems as people in the world. It's not a superhero.* Boy, 11 – Norway

As mentioned earlier, the worst thing a children's movie can be is childish, and when the children try to explain what it is that makes a film feel "childish", repetition plays a big part. Because the (social) world of children is rapidly expanding, a narrative that repeats itself is inherently "childish". Instead of reflecting the growth of the young audience, repetitive stories make the children feel stuck. Repetition thus kills attention and excitement. More than films, series play a large role in children's daily media diets, partly because, with each episode, the plot thickens. The sequencing of events, the continuous world-building and the possibility to introduce new characters speaks to their curiosity.

When the children get to voice what they are hoping and looking for in a film or a series, the children seem engaged in new, bigger worlds, more characters, and complex narratives, as these all reflect their own rapid social, emotional and educational development. More so, the young audience can digest a lot of information and is picky. Bigger narratives allow for children to choose what they hook on to within the story. Just as children are exploring the real world, they want the space within the narrative to explore for themselves. In addition, they look for development in the story while desiring for their attention to be consistently captured by what's happening on the screen.

*So good movies, of what I find, they are always good in the beginning, in the middle, and at the end* Girl, 7 – Germany

## THE FINE LINE BETWEEN THE EXTRAORDINARY AND THE ORDINARY IS WHAT ENGAGES MOST.

To the children in this age group, stories that find a balance between the magical, heroic or impressive, and the realistic and recognisable, are by far most appealing. At this age, children appear to be looking for a kind of elevated reality, be it by including a character with a magical superpower or through changing the setting into an unfamiliar place. Ordinary characters living in extraordinary settings, for example, are a strong driver for fascination. This balance allows for the story to maintain relatability, while also broadening the young audience's horizon. Pushing relatable characters out of their comfort zone results in engaging plotlines for the young audience.

*Eesti has... Well, with the revenge monsters video, there's something... Well, a little added on top, kind of elaborated. But otherwise... Just normal... Ordinary people and such.*

Girl, 11 – Estonia

*More animations. A funny movie, with jokes. With adventures, in different countries, and in ancient times. The characters would be my friends and me.* Girl, 9 – Portugal

*There should be magic in the film, but it should be played with real people.* Girl, 8 – Switzerland

## ADVENTURE AND ACTION FACILITATE CURIOUS EXPLORATION AND ENTERTAINMENT.

When sharing their preferences for the types of narratives that appeal to them, many children opt for action and adventure narratives. In line with previous insights, the children are looking for stories that entertain them, and here the feeling of a present mission, an exploration of new social worlds or a constant wave of happenings support the feeling of entertainment. Action-packed adventure films fit right into these preferences; in that they provide continuous excitement. Adventure also often indicates that children can explore new story worlds alongside the characters. This interest in entertainment is confirmed by the survey responses in this research, where 77,50% of the respondents relate the film watching experience to entertainment (instead of mainly to learning or identification).

When I watch a film, ...

- I am both entertained and learn something new about myself.
- I immerse into the universe and feel entertained.
- I learn something new about myself or others.

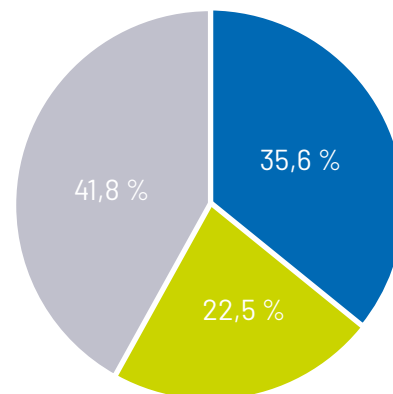


Figure 3: Survey responses to the question:  
Which statement fits best, when you think about watching a film?

## EXPLORING STORY WORLDS IS EXCITING, AS LONG AS THEY FOLLOW THE RULES.

As children in this age group are exploring the world and its rules and boundaries for themselves, they show interest in fictional story worlds all the same. Being invited into large story worlds and learning about their mechanisms is an engaging and exciting task for the young audience. This means that even in the most fantastical story worlds, the internal logic of the world must be secured. Talking animals will be accepted as long as it makes sense in the fictional world.

*They make me feel like I'm in a Kung Fu Panda world.*

Boy, 8-9 – Wales about watching Kung Fu Panda in the cinema and Kung Fu Panda videos and shorts on YouTube.

When what happens does not make sense in the world that has been established for them, children will generally connect this to the plot being childish, which, again, for children is the worst thing a film can be. Story worlds are interesting to children, but if the rules of the world are not followed in a way that makes sense to the children, they quickly lose interest.

*The worst film so far, I think was Willy Wonka, because, I do not really like this musicalish stuff and it wasn't really built up logically*

Girl, 10 – Germany

Boy: *Well, once my teacher put Peppa Pig on while I was already in 7th grade. That was very stupid.*

Interviewer: *And what do you think is so bad about it?*

Boy: *Well, there are a lot of illogical things in it.*

Boy, 10 – The Netherlands

## CHILDREN WANT TO DEVELOP, BUT NOT BE TAUGHT.

Between 7 and 11 years old, children are in a phase of continuous exploration. Their (social) world is rapidly expanding and each day comes with new experiences. Children are eager to learn and develop. However, they do not want to be told how or about what. The young audience seeks out space to determine learning goals for themselves. They want to maintain agency in what they learn from a film or other piece of media. Movies should therefore not decide beforehand what morals or lessons should be communicated. Instead, children want to explore for themselves.

*Ghost. It's a man with a skull mask. He's part of a group called "Call of Duty", special police, they have to fulfil missions to save the city from invasions, murders, etc. they protect the whole world. He's friendly and respectful towards everyone, he's really good at his job and who I would like to be in real life.*

Boy, 10 – Portugal

*The Lord of the Rings is also a good movie, I like that one too. But it's just that they teach you that family is important, that you do not have to hide from your parents or something. Do your own thing and judge. Be yourself or follow your dreams.* Girl, 11 – Estonia

## Characters

While genre elements and narratives play an important role in how the young audiences assess the films and series they are watching, these are not as important as the characters and the setting. In other words, the plot of films is generally not what draws their attention the most. Instead, they are more fascinated by strong character development. European children primarily highlight films about a social group of relatable but skilled characters in an interesting story world or in a somehow elevated reality and/or specific events that can drive suspense, surprise and entertainment throughout the story. Often, characters come before the plot and the overarching narrative, and characters represent a strong hook for the young audiences.

*And what are they supposed to do? Actually, that doesn't matter, but like that they are a group and like save the city or save someone or master some sort of task.* Girl, 11 – Germany

## EMOTIONAL MIRRORING AND FASCINATING SKILLS ARE THE BASIS FOR STRONG CHARACTER CONNECTIONS.

Across age and nationality, characters are more important than the overarching storylines, when the children talk about their favourite films. Very rarely do the children describe a plot, while taking a lot of time and consideration to describe the characters and the development they go through. Specifically, they hope to see relatable and complex characters, but preferably with extraordinary qualities as well. Characters need to be relatable, but often only one striking element will be enough to create identification.

*It has a red-haired girl, just like me, named Maria.* Girl, 8 – Portugal

*She's fun and itchy, just like me*

Girl 8 – Portugal on a character from a YouTube show

*Hermione Granger from Harry Potter. Because she is a bit like me. At least I think so.*

Girl, 11 – The Netherlands

However, identification alone is not enough for the children. The characters also need to fascinate, and here, fascinating skills can be a big help. For children, characters that already have skills, or are developing them, are very engaging. Between 7 and 11, children are at a stage where they learn many new things. Because of this, they are intrigued by characters doing the same. When the young audience is asked to point out favourites, characters with special powers, abilities and skills stand out. Especially (but not exclusively) for boys, characters resonate based on impressiveness, and not so much based on likeability and personality.

*The most interesting character was Dash from The Incredibles 2 because he runs very fast and I like this character.* Boy, 11 – Greece

*I've chosen Harry Potter because I think he's quite brave, and I think it's quite impressive that he can control such magical powers at such a young age. I know it's a fantasy film, but the character is very impressive*

Boy, 10 – Norway

## YOUNG GIRLS LOOK FOR FAMILIAR ROLE MODELS.

Whereas boys generally look for characters with impressive skills or powers, girls often look for familiar role models. Favourite characters of girls often share characteristics of relatability while also being strong, independent, and skilled. Put generally, girls look to identify and look for role models, while boys mainly seek admiration.

*My role model would be Chihiro. It's a Japanese movie about a girl who comes into a sort of fairy tale castle. But not fairy tales about princesses, but fairy tales about other races.*

Girl, 11 – Belgium

Interviewer: *So, what is the most interesting character?*

Girl: *Elsa.*

Interviewer: *Okay. And why did you choose this character?*

Girl: *Elsa: Because I really like her.*

Interviewer: *And what makes this character, what makes Elsa so interesting to you?*

Girl: *Because it's not like all princesses and because... and that's it.*

Interviewer: *Ok, and in what sense is it not like all princesses? I'm curious.*

Girl: *That in that story there are no princes.*

Girl, 7 – Italy

## LOOKING UP IS MORE INTERESTING THAN LOOKING HORIZONTALLY.

The perception of childishness which we by now know is a major deterrent for the young audience often stems from the narrative structure, but the age of the main characters is also crucial. The data shows that children prefer to look up, focusing on people that may be a few steps ahead of them. This means that teenagers and even adults can be favourite characters, but young children cannot. Not even – and maybe specifically not – if they are your own age. And if they are younger, the chance to build engagement and fascination in the audience can prove to be a struggle. Seeing a younger character experiencing something they already grew out of, is automatically uninteresting for children, meaning that different age segments within this age group express different story needs depending on their exact age. Between 7 and 11, children quickly develop which means that content should keep up.

*Why do I like the 8th one the most? Well, it's about how Harry Potter is older. That he is already grown up. Well, not grown up, just finished school. Let me just say that. Because I'm not.* Girl, 11 – The Netherlands

*I like English movies more, but I also like Dutch movies. If they are teenage movies, otherwise they are very childish.* Girl, 9 – The Netherlands

## Viewing habits – when, what, and with whom?

While this research has primarily focused on understanding what children are watching and what drives their interest in terms of AV-content, it is also important to explore the social context of their viewing habits: when do they watch, what do they watch, and together with whom?

## TO WATCH A FILM MEANS TO STREAM A FILM.

From the data, it becomes clear that streaming platforms have indeed shaped the young audiences' viewer habits, most importantly because they have created an increased feeling of freedom and autonomy in the selection process. Young audiences are no longer tied to fixed TV programming schedules. Rather, they are free to make their own decisions regarding what they watch. Popular streaming platforms such as Netflix, Disney+, and Amazon Prime are familiar grounds for children all over Europe, and across the participating countries the viewing experience of children is first and foremost platform-oriented. For children, streaming platforms have become the point of departure and, as expressed in many interviews, the platform also defines the content. "I watch Netflix" is an often-used sentence amongst the participating children, when they are asked to describe what they like to watch.

*I prefer to watch on Netflix because it's the biggest choice of movies for me and you can watch movies at any time of the day if you want and it doesn't have to depend on the time.* Girl, 11 – Estonia

Streaming platforms represent endless worlds of entertainment where children feel like they can pick and choose. Naturally, parents play an important role as gatekeepers in these scenarios, as they curate the available platforms and also — in particular for the youngest part of the group — set rules for screen-use. Many of the participating children express that they have access to more than one streaming platform, and while this allows for many choices, some children also mention that they may feel overwhelmed by the seemingly endless stream of content.

*Usually, I click on Netflix or Disney+, and then I just go and see what I like. See if I can find a new movie or a new series.*

Boy, 11 — The Netherlands

Boy: *Well, for example, I look for movies an hour before. I get nervous because I can't find one. But I can hardly find one. And the first time I turn it on, I say I do not like it. Five minutes later, I get lost in the TV.*

Interviewer: *How do you usually decide what you want to watch?*

Boy: *Well, that's how I decide.* Boy, 8 — Montenegro

## AN ENDLESS WORLD OF ENTERTAINMENT CREATES PICKY VIEWERS.

The interviews with the children show that the high digital literacy amongst children in Europe translates into them feeling capable of very independently navigating streaming services on different

screens. Many children have access to several streaming platforms at a time, as well as either owning or having access to a smartphone or a tablet, which results in them developing into independent content consumers. They are aware of the many options available at their fingertips and want to use their limited time wisely as active decision-makers.

*We look at the preview and then we see if it's fun. Does it look fun? And if it does look fun, but also not so fun, then we sometimes watch the trailer.* Girl, 8 — The Netherlands

Across ages and nationalities, children describe how they exercise agency over what they spend their time watching by comparing their various choices. This very thorough decision-making process is done by judging thumbnails, watching trailers, and viewing the first few minutes of a show or film. Time, however, is a scarce resource, also for a 7-to-11-year-old, and their limited time in combination with an endless sea of choices pushes children to develop tactics for quickly assessing — and dismissing — content. While children to some extent also rely on recommendations by peers or parents, they actively research and shape their taste themselves.

*I usually look at the age rating, then the name and the picture. Because if it has an exciting name, I'll want to watch the movie. And if it has a nice picture on the cover of the movie. But if it has a boring picture and a boring name, I might not like the movie.* Boy, 11 — Norway

## FILMS ARE SOCIAL, SERIES ARE ALONE-TIME.

When the 7-to-11-year-olds talk about watching films, they often mention how this is something they do together with their families.

Interviewer: *Who do you watch films with?*

Boy: *My family. My mum, my dad, my brother, my sister, my dog, sometimes.* Boy, 8-9 – Wales

*I mostly watch movies with my dad and at home.* Boy 9 – Montenegro

*Usually, I watch with my brother or my father.*

Boy, 7 – Greece

*With my mom, I watch movies that are a bit different, that are a little bit scarier.*

Girl, 8 – Portugal

As such, films become a social event and activity, whereas series are something children generally watch and explore on their own more. One of the advantages of watching films with the family is that, often, the boundaries for what to watch can be pushed, as the selected film has to appeal to both children and adults. Many children in the research describe how they watch films such as *Star Wars* with their parents, or other titles which are not meant for their age. With parents, the children dare to watch films that are a little scarier, more serious, or with more action.

## With whom do you mostly watch films?

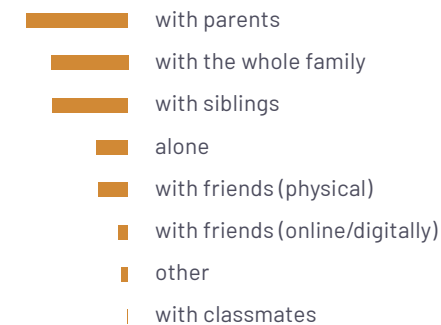


Figure 4: Less than 10% watch films by themselves, instead favouring watching with family members.

## With whom do you mostly watch series?

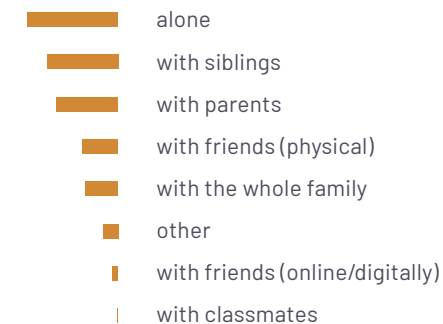


Figure 5: 1 out of 3 (28.93%) of the children watch shows by themselves.

In addition, many of the participating children express how they enjoy watching films together with other people, as they like to experience emotions and reactions together, like this 11-year-old German boy explains:

*You know, when you watch a comedy, everyone laughs together. When you watch a horror movie, everyone gets scared together. And it's just, you're together and you watch together.*

Boy, 11 – Germany

## WATCHING 'MY SHOW' IS PART OF THE NORMAL ROUTINE.

More so than feature-length films, series or shows are part of the routine of young children. As described earlier, children's knowledge of films somehow starts with either videos or series episodes. What the research shows is that the children often form a more personal bond with "their" show as they can explore these story worlds alongside the characters for a longer period of time. The threshold of continuing to watch is low compared to new films, as they are already familiar with the characters and setting. Watching a series can become ingrained in their daily routine, whereas children go more "out of their way" to watch a feature-length film. The shows they watch by themselves lean more toward comfort shows and represent "me-time".

*Actually alone, the top for me is actually to watch like Rick and Morty.*

Boy, 11 – Italy

*I have a series, it's really nice, it's called The Wookiee.*

Girl, 11 – The Netherlands

*When I'm alone at home, I often watch series such as Adventure Time and something about childhood, such as Karrewiet or something like that.*

Boy, 10 – Belgium

*I always watch at home on my own because my sister likes other things, like Dino or things like that and I don't, and that's why I watch alone on my mobile phone.*

Girl, 8 – Switzerland

Generally, children between 7 and 11 do not tend to watch films or series together with friends, although this starts to change for the oldest part of this age group. From around 10 years and up, some children describe how watching a film begins to be something they are doing with friends and not only family members. With friends, however, the selected films are funny films, where the young friends can laugh together.

## CINEMA IS NOT JUST ABOUT THE FILM; IT IS ABOUT THE EXPERIENCE.

While the smaller screens at home take up much of the participating children's headspace when they discuss films and series, the cinema remains a place of high importance to the children, and their responses show how going to the cinema is an experience in itself.

By themselves, children watch series and films on TV screens, tablets, or even phones. Because of this, one of the big selling points of the cinema is that you get to watch a film on a big screen, which according to many children allows for deeper immersion into the story.

*I think the big screen. That huge screen, it feels like you're in the movie a little bit. Like when you're watching something on a tablet or a TV. It's much smaller.* Girl, 9 – The Netherlands

Besides the size of the screen, the children point out other aspects of the setting, such as the big chairs and the fact that you watch the movie in the dark with many other people. Additionally, snacks such as popcorn stick out to the children. Altogether, for children this age, going to the cinema is not so much about the film itself but rather about the out-of-the-ordinary cinema experience.

Interviewer: *What is so awesome about the cinema?*

Girl: *Watching the movie on those seats and eating popcorn.* Girl, 8 – Portugal

*The best thing about going to the cinema is that the screen is really big and you can eat popcorn. And when you're home you do not always have that at home, but when you're in the cinema you can always buy that.*

Girl, 9 – The Netherlands

*I prefer to watch films in the cinema, because the cinema has a bigger screen and it has cooler films, because the films just aren't on Netflix right now and you can go there 3D and 4D and I don't have that at home, for example. And I have popcorn there.* Girl, 8 – Switzerland

Several children also emphasize that the good thing about going to the cinema is that you concentrate on watching the film.

*At the cinema you only watch the movie, nothing else, and mostly the chairs are more comfortable as well, but that also just feels better then.* Boy, 11 – Germany

In addition, the cinema experience is also a memorable experience, as children across the 12 countries find it easy to remember when they last went to the cinema – whether it was sometime during 2023, right before Christmas, last month or last weekend. This supports the children's idea of the cinema as a special occasion.

While the cinema-experience is primarily connected to positive experiences, the cinema also presents some disadvantages to the children. Some of the children mention the strict time schedule and fewer films to choose from. More so, in the cinema, you must adhere to social rules such as sitting still and keeping quiet for a longer period, as well as dealing with other people that you share the cinema space with.

*The only thing that's less convenient is that you can't choose which movie to watch yourself. But you can choose yourself when you go there* Boy, 10 – The Netherlands

*I do not like it when people make a lot of noise ...* Girl, 8 – Portugal

Some children further mention that they rather watch films at home because of the cosy atmosphere and practicalities such as going to the toilet, pausing, and asking questions. Especially the part of being able to ask questions or talk about the film goes together with the social aspect of watching a film.

# Local nuances

When considering the data, it becomes apparent that children aged 7-11 across Europe have very similar perspectives on and preferences for (children's) films. However, based on the children's responses and the conversations with regional experts in the field, it is possible to determine some local trends and nuances. For example, differences can be seen across Europe when it comes to the state of the children's film landscape, as well as slight variations in preferences for content among the young audience. In the following, the nuances that stand out most clearly will be given consideration.

## LOCAL LANDSCAPE: FROM FAMILIAR FAVOURITE TO UNCHARTED TERRITORY.

As established in the introduction of this report, the children's film landscape differs strongly across Europe. This is also reflected in children's content preferences. While across Europe, similar types of stories and characters appeal to children, there are only a few countries where local productions are well-known enough to belong among children's favourites. The production rate of children's film in Germany and Norway especially, as well as in The Netherlands to some extent, are reflected in the preferences of the children that have participated in the research. More than in other countries, children here are at the very least familiar with locally produced films. Seasonal stories and films that are part of larger story universes especially do well, considering cinema visitor numbers. German children, for example, show a preference for local productions and favour stories written or produced in Germany. However, since everything in Germany is dubbed, children do not seem aware of having this preference as they do not always know how to differentiate between German and international movies.

## CONTENT PREFERENCES: FROM ELEVATED REALISM TO MAGICAL ESCAPISM.

Children's film productions from northern European countries generally have a tradition of taking a socially realistic approach, concerning societal and interfamilial issues in the real world and paying attention to issues of diversity, as well as serious life topics such as grief, death and friendship. While children in Norway, The Netherlands and Belgium prefer films that are recognizably realistic, they also highlight how they look for an elevated kind of realism. For them, this particularly takes the shape of action and adventure – more so than in other regions of Europe.

*I usually watch suspense films, action.  
Because that's what the boys in my class like.  
And that's what I also like – so action,  
suspense.* Boy, 10 – Norway

*I thought Mario was very funny. I thought everything  
that happened was funny. And there's a lot of..  
Action. Action. Something happens all the time.*

Girl, 8 – The Netherlands

When it comes to Germany and Switzerland, on the other hand, children are a little more careful. Here, children are mainly interested in feel-good, light-hearted and easy to digest content: fun is key. While suspense or thrill can be sought in adventure and fast-paced developments, it should definitely not be too scary or close to 'horror'. Compared to other countries, German and Swiss children are looking for a sense of security throughout a movie or film experience – they need guidance and assurance throughout.

*And then I would just say, that it's suitable for children and it's not that scary.* Girl, 10 – Germany

Girl: *My favourite series is Paw Patrol, November and Fireman Sam.*

Interviewer: *And why?*

Girl: *Because my mum makes the films and because it's for children.*

Girl, 7 – Switzerland

In Estonia, Poland and Montenegro, a larger interest in 'magical escapism' becomes apparent. Estonian children especially see magic as an important part of movies for children and their favourite films often feature magic, mystery or witches. When it comes to Poland, on the other hand, preferences are closer to sci-fi but still show a great interest in a world they can escape into that is slightly different from their ordinary life.

*For my age, the movie should look like it has more magic and unusual characters that do not exist.* Boy, 9 – Montenegro

*It has a lot of mythical creatures, magicians, superpowers, it is all green, there are a lot of swamps, meadows and we are all different.*

Girl, 9 – Montenegro

Finally, Portuguese children appear to understand children's films more as animation films than children in other countries in Europe. Although there is a definite interest in live-action films too, from their responses it becomes clear that their current favourites are

very often animated. Possibly, this is a general preference in Portugal across ages, as one Portuguese expert points out that they perceive animation (mainly aimed at adults) to be a growing industry in Portugal.

*A children's movie is a movie for young people. It doesn't have as much horror, like the grown-up movies. And it has cartoons, like Minnie.*

Girl, 8 – Portugal

## ACCESSIBILITY: FROM STREAMING ABUNDANCE TO CINEMA SCARCITY.

In The Netherlands and Norway especially, the audience is active on streaming platforms, with more than 90% of people aged 16 and up having used online streaming sources for watching videos.<sup>4</sup> Looking across the other participating countries, the numbers are not as high. Although these numbers are not specifically about children aged 7-11, these streaming habits are reflected in our data as well. Across Europe, many children mention having three or more platforms, streaming options, formats to choose from at any time, and many can also choose between devices. For many Dutch and Norwegian children, specifically, going to the cinema is a normal occurrence, not a rarity or special occasion. As a result, the children in these countries especially are a picky audience and feel like they have agency in deciding what they want to watch. For example, children in Norway and The Netherlands talk more about looking up reviews before taking a chance on a film.

<sup>4</sup> Eurostat, <https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20240415-2#:~:text=In%202022%2C%2065%25%20of%20individuals,%25>

*Well, usually I choose between the things I've already started with. But sometimes I also choose a whole new movie and then I watch a small part of it first. And then I decide what I think of it. If I have decided, then I choose it.* Boy, 10 - The Netherlands

Interviewer: *How do you choose a movie?*

Girl: *On Netflix you see the pictures and then I choose the one that looks the best.*

Girl, 8 - The Netherlands

For children in several of the other participating countries, especially Greece, Montenegro and Wales, visiting the cinema is less of an option than for children living in the richest European countries. In Wales, for example, poverty rates are high,<sup>5</sup> making the cinema an unaffordable luxury for many. In Greece and Montenegro, experts explain that cinemas are mainly located in the respective capital cities, making them more difficult to access for children living outside of the city. While generally, streaming platforms are accessible to and used by children across Europe, these hurdles for visiting the cinema will likely also make it harder for children in these countries to get acquainted with local or even European productions — as these can be hard to find on international platforms.

<sup>5</sup> <https://www.wcpp.org.uk/wp-content/uploads/2022/09/Poverty-in-Wales-Policy-Briefing.pdf>

While it is important to highlight these nuanced local differences, as they will have implications for the way children across various countries perceive films made for them, what is most striking about the children's responses in this research is how alike they are across borders. Across Europe, children share more common definitions and understandings than previously assumed. These shared perceptions form a foundation that transcends cultural and geographical boundaries, emphasising the universal nature of children's experiences and their collective engagement with film. This insight paves the way for creating films that resonate broadly while honouring local specificities.

## Acknowledgements/ Imprint

Published by  
**KIDS Regio c/o German  
Children's Media Foundation  
Golden Sparrow**

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Development & Publication  
**2023/2024**

Realised by  
**PUBLIKUM /**  
Represented by **Rikke Flodin**

**kids**  **regio**

Financial Partners

**PUBLIKUM /**



Organisational Partners



Foundation Partners



Other Financial and Cooperation Partners



## BOOK 3

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# Introduction

Within the children's film sector there is a shared premise that children have the right to access a diverse range of films, including films in their own languages and featuring locations and issues that resonate with their own experience. In acknowledgement of this right, national film institutes, festivals and associations have implemented a range of policies and strategies to support the growth of the production, distribution and exhibition of children's film. It is critical to the future development of the European children's film sector that the impact of these approaches is understood, but access to data which enables international comparison has been limited. This limits, in turn, opportunities to understand successful case studies which could provide insights into important ways to develop the sector.

KIDS Regio has therefore led an important exchange of information between the European Children's Film Association (ECFA) and the European Audiovisual Observatory (EAO).

The collaboration resulted in an analysis of data on European children's feature films produced between 2018 and 2022, conducted by Dr Becky Parry, an ECFA board member with extensive professional and academic expertise in children's film and film education.

This report provides a summary of the key findings of the analysis, together with recommendations that emerged during the presentation of the data at the 2024 KIDS Regio Forum.

## THE PARTNERS

### KIDS Regio

KIDS Regio aims to promote the cultural, educational and artistic value of European children's films, recognising their role in shaping young people's perspectives and cultivating shared values. Children's films reflect diverse lives and cultures, making them essential for young audiences across Europe.

By fostering collaboration and strategic partnerships, KIDS Regio connects industry professionals, policy makers and advocates to advance the children's film sector. Through the KIDS Regio Forum and ongoing dialogue, stakeholders are empowered to develop strategies that reflect Europe's diversity. Throughout the year, KIDS Regio engages in research, events and advocacy to keep children's film at the heart of Europe's cultural landscape. Through collective action, the initiative works to ensure a sustainable and thriving future for children's cinema.

### The European Audiovisual Observatory

The European Audiovisual Observatory was set up in Strasbourg in 1992 to reply to a distinct lack of information and transparency concerning this industry. To the present day, it continues to provide a comparative European overview of the audiovisual industry in 40 different countries as well as detailed analysis of national and even regional industries.

## European Children's Film Association

Founded in 1988 ECFA is a membership association for film-makers, producers, promoters, distributors, exhibitors, TV-programmers, festival organisers and film educators etc. interested in children's films. ECFA has almost 150 members comprised of companies and organisations from 41 different countries.

- Networking: ECFA is the open network organisation for a wide range of professionals in the field of children & youth film and film and media education, based upon sharing knowledge and mutual solidarity among its members.
- Informing: ECFA spreads relevant information among its members and beyond.
- Facilitating: ECFA facilitates multiple forms of and occasions for exchange, both online and physical, among its members and other professionals, building bridges between various networks.
- Lobbying: ECFA lobbies on behalf of the children's film industry on a political, educational and cultural level (regular systematic contact).

## Methodology

ECFA create a range of databases, updated annually, for short films and feature films. The database is created through a process of research and data collection from a range of sources, including industry publications, annual children's film festival programmes and film production information sources. This database includes films up to age of 18.

<https://www.ecfaweb.org/european-childrens-film-network/feature-films/>



Data about children's film production are not consistently recorded by national agencies, therefore the database is selected on the basis of the following criteria:

- Films made in the period that have been selected by film festivals for young audiences.
- Films that have been recommended by children's film professionals.
- Films that ECFA are made aware of through industry networks and communication.

The key focus of this analysis is on film production for children up to the age of 11. Films made for young people with an age recommendation of 12 and above have therefore been removed from the data base, prior to analysis.

The European Audiovisual Observatory added to the database audience figures which enables further analysis of the reach of the films in the database.

A series of questions were applied to the data in order to make international comparisons and these are presented here. Early insights from this data analysis were shared with participants at the KIDS Regio Forum. Participants were invited to say what data would be useful to them in their own work and results of this activity are presented in the report.

Some insights about admissions for individual children's films are commercially sensitive and have not been included here.

## LIMITATIONS

The data we are presenting is from a database created by ECFA to provide members with insights into the range of films available to young audiences. The films included in the database, represent the range of national definitions of what constitutes a film suitable for children aged 12 and under.

This database was never intended to be a comprehensive data set of all feature films for children made in Europe. As a consequence, there are a small number of films included which are films about childhood or films with themes relating to childhood, rather than films made specifically for children.

More work needs to be done to clarify what constitutes a children's film, for the purposes of future data collection and analysis and, in particular, there needs to be more consistent use of sector guidelines to help distinguish between children's film, youth film and films about childhood and youth.

## Summary Insights

- 371 films classified as being for children are included in the analysis and were made in the five-year period between 2018 to 2022.
- 34 countries were involved in the production of these films.
- 264 of these films were from 29 countries (single origin).
- 107 of these films were from multiple origin countries (including countries outside Europe).
- The year with most films was 2018 with 86, followed by 2019 with 78. There was then a drop off which is likely related to the Covid-19 pandemic before the number of films made picked up again in 2022 (77 films).
- In the five-year period between 2018 to 2022 the country creating the most films for children was Germany (including multiple origin).
- In the five-year period between 2018 to 2022 the country creating the most films for children (single origin) was Germany (84 films), followed by France (70 films). The output from these two countries accounted for 42% of all films.
- In the five-year period between 2018 to 2022, the total audience figure for children's films was around 150 million. Of which 61% were national admissions and 39% non-national admissions.
- During this same period, 35 children's films attracted audiences of one million or more.

# Overview of Production & Distribution Numbers

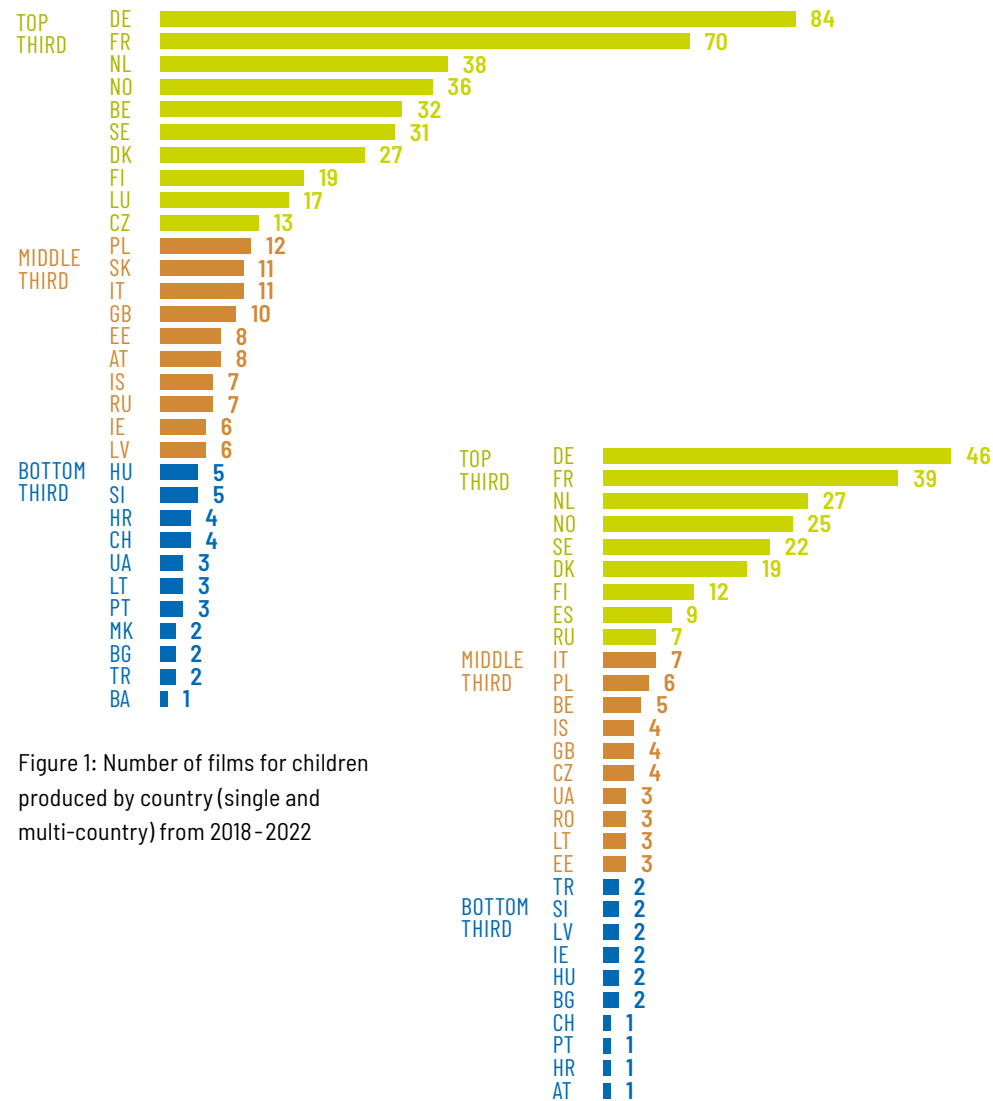


Figure 1: Number of films for children produced by country (single and multi-country) from 2018-2022

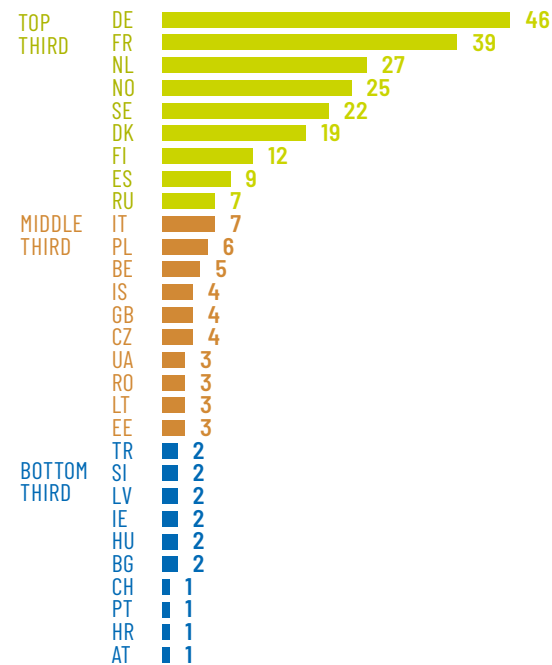


Figure 2: Number of films for children produced by country (single country) from 2018-2022

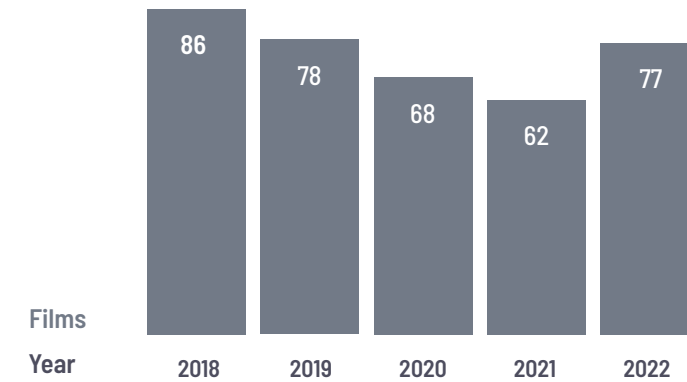


Figure 3: Number of films for children produced per year from 2018 to 2022

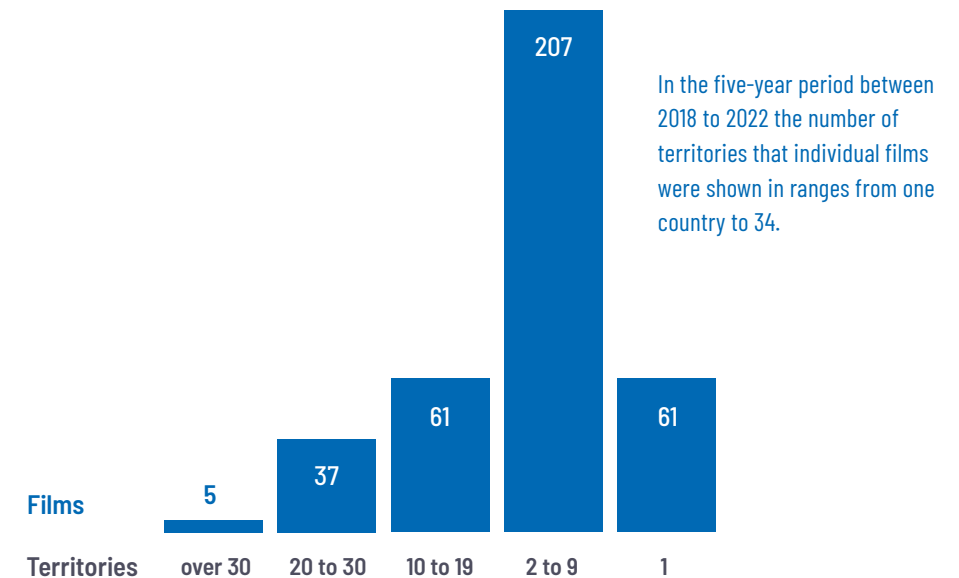


Figure 4: Distribution of films for children by territory from 2018 to 2022

## TOP THIRD

Country	No. of films
NO	154
DE	148
PL	145
CH	139
LU	134
BE	133
FR	119
AT	116
NL	112
EE	111
ES	107

## MIDDLE THIRD

Country	No. of films
LT	106
DK	84
FI	76
SI	71
SK	71
HU	70
LV	69
ME	69
BA	67
CZ	66
PT	60
TR	60

## BOTTOM THIRD

Country	No. of films
IT	59
HR	57
GR	51
RO	48
GB	46
MK	45
IS	40
BG	37
IE	36
CY	33
RS	5

Table 1: Number of films for children shown in cinemas per country from 2018 to 2022

## TOP THIRD

Country	Admissions
DE	19,682,081
FR	14,694,832
ES	7,928,781
PL	5,896,923
IT	4,568,005
NO	3,998,422
NL	3,372,215
DK	2,302,193
AT	1,983,450
CZ	1,680,185
GB	1,584,875

## MIDDLE THIRD

Country	Admissions
FI	1,573,921
TR	1,490,108
CH	1,419,782
BE	1,358,619
RO	883,690
PT	703,224
HU	683,608
EE	642,352
SK	545,051
GR	502,345
LT	429,563
HR	418,686

## BOTTOM THIRD

Country	Admissions
SI	376,095
BG	371,985
LV	348,043
IE	246,554
BA	189,995
IS	153,178
LU	152,609
RS	49,793
CY	47,911
ME	36,939
MK	14,745

Table 2: Total admissions of films for children per country from 2018 to 2022

According to the age recommendations attributed to the films, the number of films made for each age in the database for the period 2018 to 2022 show a dominance of film for the six to eight year olds.

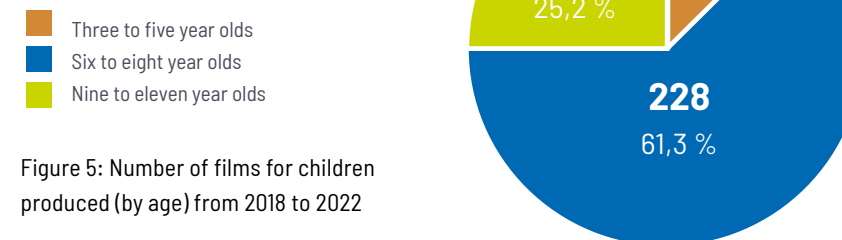


Figure 5: Number of films for children produced (by age) from 2018 to 2022

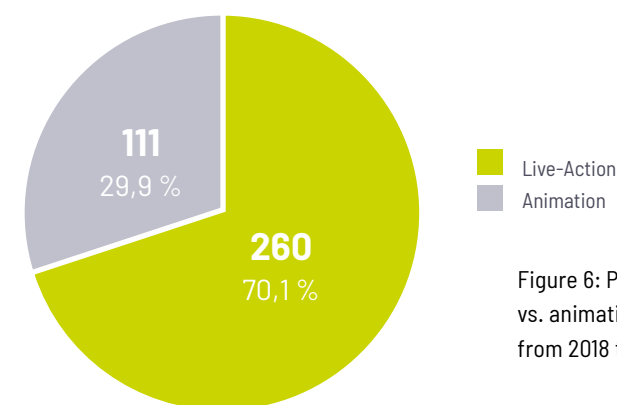


Figure 6: Production of live-action vs. animation films for children from 2018 to 2022

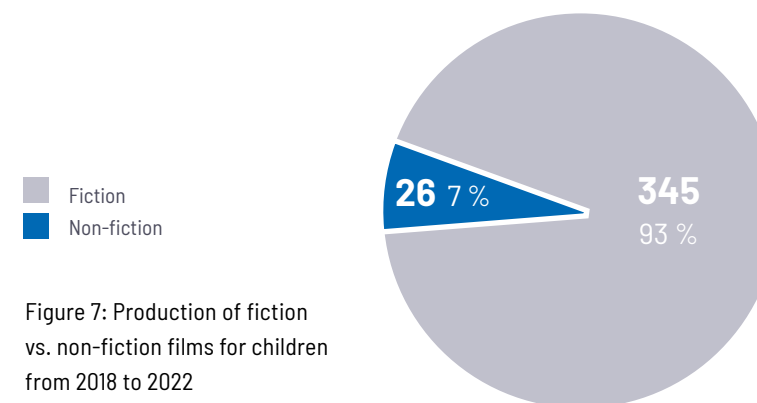


Figure 7: Production of fiction vs. non-fiction films for children from 2018 to 2022

# KIDS Regio Forum 2024: Consultation

During the KIDS Regio Forum in 2024, early insights from this data analysis were presented and participants were invited to suggest what insights they would need to help them in their work. They were asked to consider:

## *What quantitative data about children's film is accessible and how can we use it to lobby for children's film?*

The suggestions are summarised here, in order to enable the sector to collectively determine how they might gather this information.

There was some discussion about whether an industry wide accepted definition of a children's film would ensure accurate data was being collected, with clear criteria.

## Participants were keen to know:

- the average budget of a children's film and to be able to make comparisons, for example, so that the proportion of investment in children's film could be determined.
- what percentage of general admissions, children's film admissions are.
- the number of prints for each children's film, in each territory.
- the least and most successful children's films for each year.
- the admissions for individual films and not just for the first year.
- the number of children's films in regular distribution and were keen to be able to make comparisons across territories.
- a breakdown of admissions by different criteria like animation, live-action, documentary, adaptation, original screenplay and target group.
- how many children's films are accessible outside the country of origin within Europe.

- age, gender and ethnicity breakdown in terms of main characters and film directors.
- non-theatrical admission figures.
- the impact of where films are screened – for example in multiplexes or smaller cinemas.
- the accessibility of children's films in different territories.

Participants were interested in country profiles, covering number of films, titles, genres, audience profiles and market share and would like to see a breakdown country by country of the top ten / twenty films (in terms of admissions) and where children's films sit within this list.

Participants were keen to see audience profiles for individual film titles, such as those produced by the Danish Film Institute (audience database).

Participants expressed interest in research which examines case studies of interest, such as local commercial blockbusters (e.g. *Terkel in Trouble*).

## Conclusions

There is evidence of the success of key children's film titles and of national policies in relation to the production, distribution and exhibition of children's film within this report.

However, for the data to be scrutinised and understood further, relevant contextual information about each country and relevant films also needs to be provided.

More work also needs to be done to ensure that the films included in the database are children's films, according to sector definitions.

# Recommendations

There are some changes that could be made relatively easily to the data collection and reporting process that would be of value to this sector. These include:

- EFCA, KIDS Regio, National Film Agencies and the European Audiovisual Observatory should work in partnership to review the data collection process for children's film production to enable an annual reporting of relevant data and analysis to an agreed set of criteria, to enable annual and international comparison.
- This partnership should aim to establish a European online data entry process for children's film, to enable more analysis to be undertaken.
- As part of this process the partners should identify which information needs to be recorded in relation to each children's film.
- The European Audiovisual Observatory recommends the use of the unique identifier which exists for each film to be used in the database which improves opportunities for data analysis.
- Partners should seek support from academic partners and funding to enable an analysis of the data collected over the past ten years and annual publications from now on.

## Acknowledgements/ Imprint

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Development &  
Publication  
**2024**

A cooperation of

**kids  regio**



## Imprint: Building Bridges – European Children's Film in Focus

Published by  
**KIDS Regio c/o German Children's Media  
Foundation Golden Sparrow**

Represented by  
**Elisabeth Wenk**

Project Management  
**Anne Schultka**

Edited by  
**Anne Schultka  
Elisabeth Wenk  
Anna-Lena Pritz**

Design & Layout by  
**Grafikdesignerinnen  
Ricarda v. Tresckow**

Publication  
**2024**



