

Steffi Ebert

European children's films:

numbers,
challenges &
questions

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Halle, June 2019

Summary

Between 2004 and 2017, 946 children's films were produced or co-produced in 35 countries in Europe. A comparison of the periods from 2004 to 2013 and from 2014 to 2017 shows a 21% increase in the number of productions. Especially co-productions grew by about 52%, national productions by 12%. However, compared to the total of European film productions, the increase in children's film productions is somewhat smaller.

In 2017, children's films made up 6.2% of all European film productions, but drew 10.7% of the EU cinema audience for European films. They are watched by 3.1% of the total EU cinema audience for international films including from outside Europe. The share of children's films is therefore nearly as good as it was in the previous study, where their EU market share reached 3.3% per year and the share in the audience 11%. (Kanzler 2014, p. 8)

This success is however more the achievement of animated films and less that of live action films. Although only 33% of productions are animations, they draw 55% of the audience. This strengthens the position of animation in the production of children's films. Live action films show lower growth in production and reach a smaller audience.

The five most important countries for the production of children's films are Germany, France, the Netherlands, Denmark and the United Kingdom. Denmark, Luxembourg and Norway are in the lead when it comes to the share of children's films in total national productions.

Co-productions draw on average a bigger audience and are more frequently shown on more than five non-national markets than 100% national productions. However, their high audience figures are very strongly concentrated on a few productions only – for a large share of co-produced children's films, the audience figures are below average, showing that co-productions are not automatically more successful with the audience.

The protagonists in European children's films are predominantly male (49%). Female protagonists make up only 24%, mixed groups of children 27%. In only 2.8% of all films, i.e. in only 16 films in total, child protagonists have cultural roots outside the country of production.

DR. STEFFI EBERT: PHD in media science (2008), is scientific associate at Martin-Luther-University Halle-Wittenberg. Her research interests are children's films and production studies, the relation between media studies and media practise, data research and media analysis. steffi.ebert@medienkomm.uni-halle.de



Introduction & objectives

In what condition is the European children's film? This is the underlying question of this study prepared on the occasion of the third international KIDS Regio Forum 2019.

In 2009, 2011 and 2014, the European Audiovisual Observatory (EAO) already carried out studies on the theatrical circulation of European children's films (compare Kanzler 2009, 2011 and 2014). The present study is based on these previous analyses, expanding them by certain questions and perspectives. Following the earlier studies, this study too focuses on production figures, circulation and audience success of live action and animation films but additionally looks at the development and audience success of co-productions as a comparison.

Those predominantly economic questions will additionally be complemented by a media scientific perspective. The present study is, for instance, based on different selection criteria from the data base, i.e. on a scientific and distinct definition of children's films. The distinction between national and non-national markets is also methodically different. Besides the quantifiable parameters of theatrical circulation which were and are in the foreground of this and the previous studies, the present study also aims to point at further reaching issues and questions of and about the European children's film based on the available data.

The chosen data-related approach to the children's film can analyse the economic situation of the European children's film in its structure and by various parameters. Such data-based analysis of the children's film is also able to place individual productions inside the greater context of productions and social developments. But, similar to satellite pictures from space, the picture of the children's film becomes increasingly blurry the closer one tries to look at it from such data-based perspective.

This study therefore gives on the one hand an overview on the question of the condition of the European children's film and, on the other, wants to open up the topic towards further-reaching national, European or global studies and differentiated individual analysis. I would like to take this opportunity to thank those who ordered this study for making it possible to offer further and media science related perspectives within this study. Mutual understanding between academic research and the film industry is very difficult, because decisions in media policy have up to now been mainly made without taking heed of academic perspectives, which meant that scientific research was only able to start after paradigmatic decisions had already been taken. Julia Hammett-Jamart, Petar Mitric, and Eva Novrup Redvall write, in their analysis of the consequences for the development of European co-productions,

"The result is that much scholarship on co-production is focused on evaluating outcomes rather than understanding, analysing and critiquing practices, and in this turn may diminish the relevance to industry or policy professionals of much scholarship on co-production. This is a vicious circle, because the perception that scholarship may not have much to offer the industry means that valuable data then becomes more and more difficult for scholars to access."

This in turn means that "the industry continues to contend with big issues and challenges without the benefit of informed scholarly insight." (Hammett-Jamart et al. 2018, p. 9)

I am therefore very grateful for the opportunity to include in this study media scientific questions that analyse the current practices of children's film production and critically assesses them on the basis of the available data. This way, the dialogue between academic research and the film industry can, at least for a bit, be held also within the context of such commissioned studies.

The study answers the following questions:

1. How many children's films were produced in Europe, and in what countries?
2. How is the overall share and performance of children's films developing?
3. How have the formats of live action film and animation film been developing?
4. Are co-productions performing better than national productions?
5. Who are the child protagonists in European children's films?



Approach, sources & definitions

Approach

The basis for the analysis is children's films which are regularly tracked for KIDS Regio since 2010. The data captured for each film include running time, format (animation, live action), director, production, distribution and festival presentation. Out of a media scientific interest, this study also retrieved additional information on genre (according to IMDb), screenplay, original story, festival performance, international distribution, alternative title, prequels and sequels.

The data were normalised and prepared for analysis. Statistical evaluation is descriptive. The datasets are so called long tail data, which have synonymously also been referred to as "small data", "legacy data" or "orphan data". (compare Horstmann et. al. 2017) This means that, in contrast to "big data", these data do not come from easily identifiable sources but are of a very disparate provenance whose management through metadata exceeds any research economy. Some of these data are the result of case-by-case decisions if sources contradict each other. This is why the reproducibility of these data is rather very limited and there are great problems with storing these data or making them available as it is difficult to capture and manage these data in structured workflows along common standards. As a result, they are rarely used in science, theory or funding since "ensuring such data is discoverable and stored in appropriate formats with relevant curation and metadata to facilitate reuse is challenging" (ibid). These challenges also apply to the database and its contents here. The study had further to comply with EAO's general methodological restrictions regarding the collection, representativeness and accuracy of all data and information here used (compare EAO). This study nevertheless aims to provide a representative picture of the facts on the European films for children as defined below.

Sources

The films themselves were researched for Kids Regio. Research drew as a basis from ECFA's extensive annual list of films for children and young people. In addition to this list, the study checked what films were represented at various European children's film festivals such as in Zlín - International Festival for Children and Youth, the Giffoni Film Festival, Cinekid Amsterdam, or Schlingel Chemnitz. The production reports of the members of the European Film Promotion (EFP) network were systematically searched for children's films. There is a great diversity of sources for follow-up research on the films, including the websites of the films themselves, of distributors, national film institutes, IMDb, Wikipedia and many more. As regards admissions, they were verified by individual film title as shown in EAO's (European Audiovisual Observatory) Lumiere database for the years 2011 through 2017.

Definitions

CHILDREN'S FILM

"There is no universally accepted and consistent definition of a children's film which could be applied across Europe", writes Martin Kanzler in his 2014 study. (Kanzler 2014, p. 12) There can insofar be no universal definition of children's films as the question of what a children's film actually is depends on the perspective one takes. If an analysis focuses, for instance, on how children and childhood are represented in films, it would also have to include films that are not necessarily suitable for children because in these films, the children may not be children as such but stand for things like innocence, sexuality, imagination, death or infanthood. (compare Lebeau 2008 or Lury 2010) Within the meaning of studies on media consumption, we need to find other definitions for films that children watch because these are often films with adult protagonists. They would then also have to include any film that may be unsuitable for but is watched by children when no one is looking, such as films that are available by YouTube's "autoplay" function, for instance. There is last but not least the fundamental question whether there even is such a thing as a professional "children's film" because films for children are made by adults who construct children and childhood, but can never take the true perspective of a child because they are adults. (compare Rose 1993)



Despite these difficulties in finding a definition, the collection of data on which this analysis rests is based on a systematic assignment to a definition of children's films. This definition stems from the theoretical assumption that children's films are structured, and structuring, childhood elements. This means, when taking up Pierre Bourdieu's concept of habitus, that the children shown in films are, first, the result of societal conditions and their creative interpretation. Second, shape their audience's idea of childhood and, third, are a practical ingredient of the cinema goers' lives.

Children's films are therefore here defined as films for, but not limited to, children and families with child protagonists. They are suitable for children and have been shown in cinemas.

To be included in the dataset, the film had to meet all of the following conditions in terms of described content and freely accessible audiovisual artefacts (e.g. trailers):

BY FORM, a children's film is a coherent cinematic or cinematically narrative audiovisual product for primary theatrical circulation, meaning that it has been shown in a cinema at least once. This also includes films that, although they have no theatrical distributor, have been shown at festivals (Czech fairytale features, for instance). Admission figures for these films were not identified as the European Audiovisual Observatory (EAO) does not capture them. The children's films included in this study have a running time of not less than 60 minutes and are mainly fiction. Their age recommendation was no higher than 12 year in, and they were produced or co-produced by, at least one European country.

BY REFERENCE, a children's film predominantly targets children or families with children.

BY CONTENT, there is at least one pre-adolescent protagonist. An exception is fairytale feature films where the lead roles are played by young adults – here, the name of the genre has to speak for itself. Anthropomorphic characters or adults who behave like children are also possible. Children's films can be live action films or animations.

EUROPE

The dataset contains with the exception of Morocco data from all 41 EAO members. In the period from 2004 until 2017, children's films were produced by only 35 of these countries. To capture all EAO member states requires, for instance, to be able to integrate admissions from non-EU member states such as Norway and Switzerland. However, for maintaining comparability to EAO figures, evaluation excluded two Serbian and five Ukrainian children's films.

DEFINITION AUDIENCE FIGURES (ADMISSIONS)

Admissions refer to cumulative admissions in the EAO territory since theatrical release. The data were individually identified by film within the Lumière database.

MEAN AND MEDIAN

Mean admissions is the total of all admissions divided by the number of films. The median is found by arranging the values of the films (e.g. admissions) in order and selecting the middle value.

NATIONAL MARKET

National market is defined as the markets within the producing or all co-producing countries. In this, the study differs from the previous EAO analysis (Kanzler 2014) as well as from EAO's general method where national markets were only those countries that were classified as that co-producer who provided the majority share of funding, i.e. one country per film. This meant that if a film was produced in Germany, France and Belgium, only the first country would count as national market. This study takes a different approach and would count all three countries as national markets.

CO-PRODUCTIONS

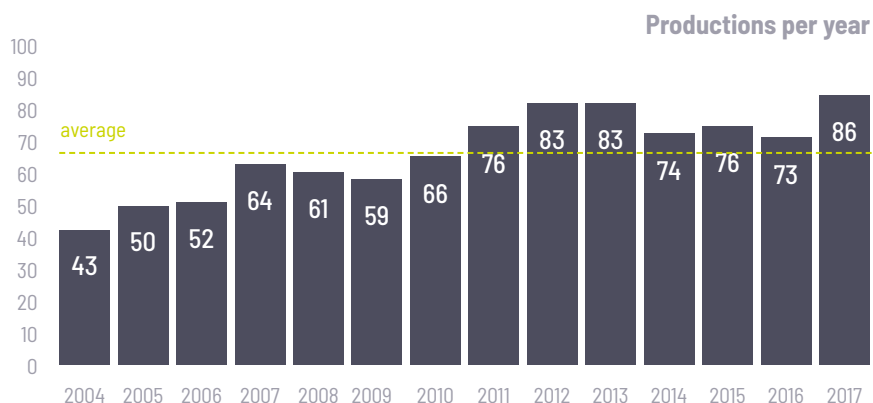
For co-productions too, the films concerned were assigned to all co-producers. If a film has been produced in Germany, France and Belgium, that film counts in the assessment by country for all three of them, i.e. Germany, France and Belgium. Those co-producers whose countries are not a member of EAO have been excluded from the study. This however means that factual statements about admissions by country cannot provide actual figures. They provide scales of proportion only.



1. How many children's films were produced in Europe, and in what countries?

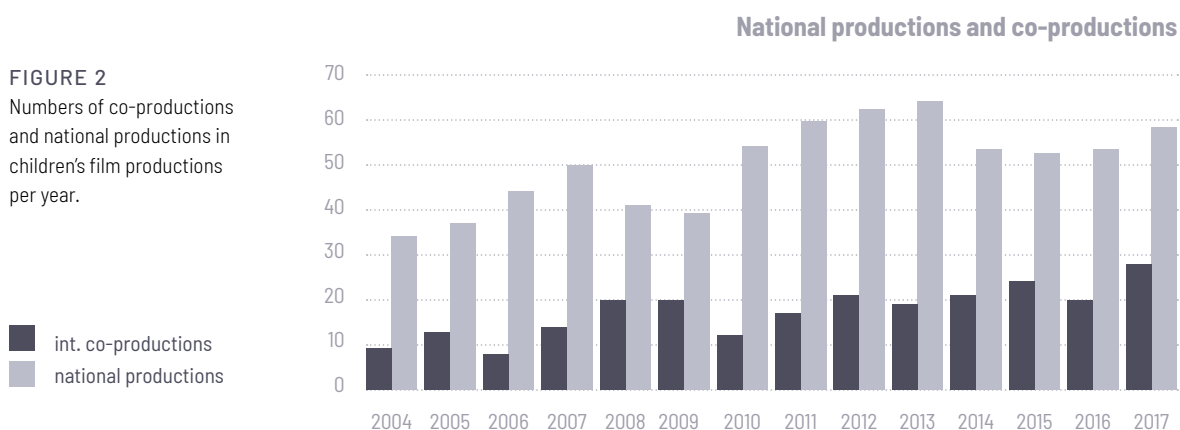
Between 2004 and 2017, 946 children's films were produced in Europe. Compared to the earlier periods from 2004 to 2013 (the period covered by the previous study) and from 2014 to 2017, production figures rose by approximately 21%. A comparison with total European production is not possible since there were no available figures for these periods. In the period from 2007 to 2016, European feature fiction productions rose by 33% (Talavera 2018, p. 29). In the same period, children's film production increased by 14%. Although production volumes oscillate generally quite considerably and comparisons of individual years do therefore not provide sufficient insights, other comparative calculations with other years too indicate that the growth in the production of children's films falls short of the growth seen in total feature fiction production.

FIGURE 1
Number of children's film productions per year (total).



Of these altogether 946 films, 246 films were international co-productions and 700 uni-national productions.

FIGURE 2
Numbers of co-productions and national productions in children's film productions per year.



A comparison of the growth of production in national vs. co-produced films shows significant differences. Whereas purely national productions grew only by 12% in the periods of 2004-2013/2014-2017, co-productions rose by 52%. This strong rise in co-productions matches the general trend on the European co-production market. (compare Talavera 2018, p. 31) In summary, we therefore find that production growth in children's film production falls short of European production growth, especially in the category of national productions.



For determining the production figures by country, co-productions were counted several times and credited to every country involved. This approach differs from the previous studies where films were credited only to that country that had provided the majority share of funding. (compare Kanzler 2014, p.42) This is plausible from an economic viewpoint but, from a media science perspective, disadvantages those countries whose financial possibilities permit participation in children's films only by way of co-production (compare Appendix 2 and co-production analysis). This also includes so called minority co-productions.

With this "count-in approach", the number of total productions in the period is 1226; 526 thereof are co-productions and 700 national productions. Any co-production involved on average 2.1 countries. Production figures by country were as follows:

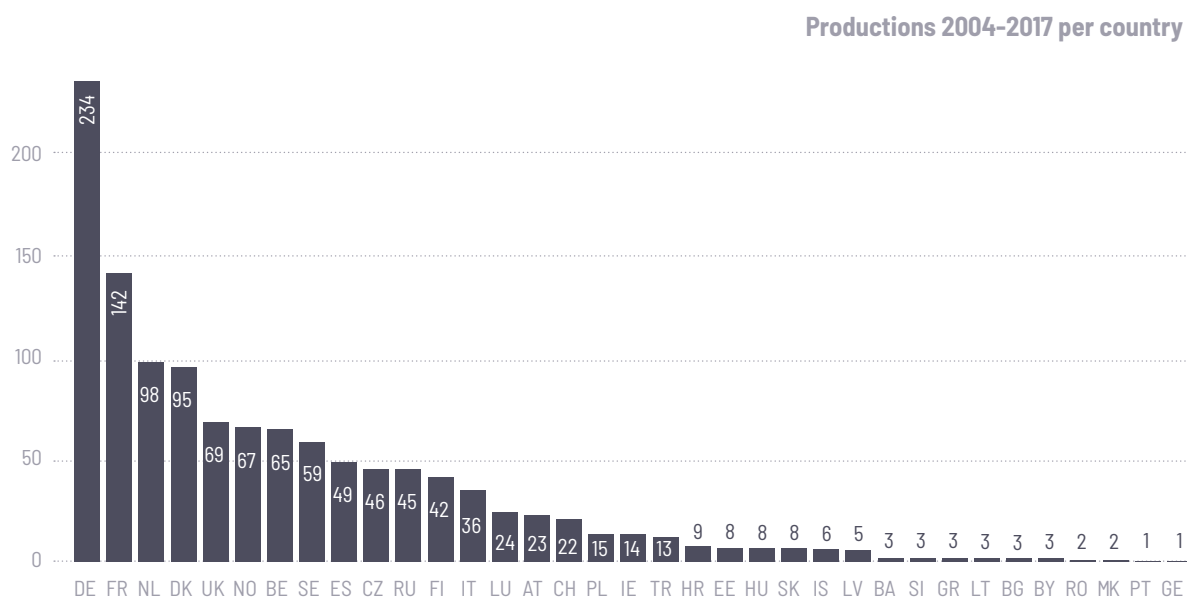


FIGURE 3

Number of productions per European country 2004-2017. See Appendix for a comprehensive list.

The five most important producing countries are Germany, France, the Netherlands, Denmark and the United Kingdom, having a share of 52% of all children's film productions. The top 10 countries have a share of 75% of all children's film productions (national and co-productions).

These figures show that it is by far not only the size of the countries and markets that decides the number of productions, but also national funding policies and production landscape, because the countries with the most children's film productions are notably not necessarily those with the most feature film productions. In the period from 2007 to 2016, the top 10 of the latter group were: United Kingdom, France, Germany, Spain, Italy, Russia, Switzerland, Turkey, the Netherlands and Denmark. (compare Talavera p. 30) This becomes even more apparent when one looks at the share that children's films have in total production:



Children's film % share of total feature film productions per country

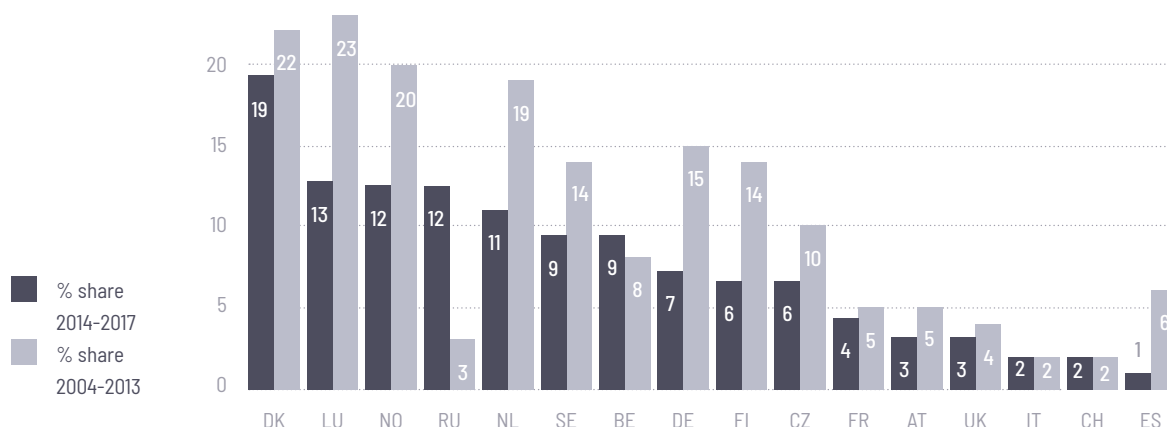


FIGURE 4
 % share of children's film production in total feature film production under comparison of the periods 2004-2013 / 2014-2017. (only countries with at least 1 production per year/see Appendix for comprehensive list)

In terms of the proportion of children's film production, the list is topped by those small countries who have all in all a healthy film production environment while, at the same time, aiming for high shares of children's films, such as Denmark, Luxembourg and the Netherlands. Since the last study, the picture has somewhat changed in that the share of children's films is showing a slight decline. This comparison has its limits, however, because the data basis of the 2014 study had been a different one. In the field of the most important children's films producers, Russia has considerably gained in strength.



2. How does the overall share and performance of children's films fare in comparison to the European film?

Between 2011 and 2017, 552 films were produced. For 478 of them, admission figures were available and form the core of this chapter. A variety of parameters such as admissions, non-national markets and festival participation, was analysed in order to gain an impression of the films' performance. Deviating from the previous studies and EAO's methodical approach, this study does not compare the concrete average figures for the non-national markets but asks instead what films were sold into more than five European markets excluding those of the producing and co-producing countries. The EAO method recognises only one country per film as national market. For co-productions, this is the country that provided the majority share of funding. Since the production landscape is increasingly diversifying, proper assignment of a majority share becomes very difficult. If, for instance, France and Germany provide for a given film 40% of the funding each, EAO decides the case on an individual basis and follows the details provided by their respective source (on this method and its limits compare also Kanzler 2016, p. 14–22). Recognising only one national market for co-productions (compare Kanzler 2014, p. 41) has also the problem that co-produced films are theatrically circulated more or less automatically also in the co-producing countries because potential distributors have already been involved in the production process. If a film is produced in the Netherlands and Belgium, for instance, it will be shown in the cinemas of both countries. This is why it would be actually necessary to establish in how many international markets excluding the producing and co-producing countries the films circulated. To do so would however be outside any research economy. This is why, for this study, the category of "more than five excluding the producing and co-producing countries" has been introduced in order to gain insights on films with especially strong international circulation.

As third parameter, the study analyses how many films had been presented at more than three international European festivals. This is believed to indicate films with a rather positive festival career.

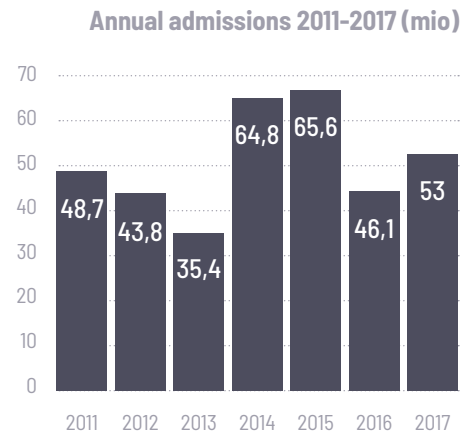
Admissions are cumulative which means that they comprise admissions from theatrical release until June 2019. This approach matches that of the previous studies. Only for comparing annual revenue, the films' revenue for the year 2017 has been additionally researched.

RESULTS

In 2017, the children's films produced made up 6.2% of total European film production, but drew 10.7% of total admissions for European films. They have a share of 3.1% of all admissions for international including non-European films. Compared to the previous study where children's films had a market share of 3.3% and generated 11% of admissions (Kanzler 2014, p. 8), the share of children's films remained nearly the same. This success is however due to the performance of animated films rather than that of live action films, as will be shown later on.



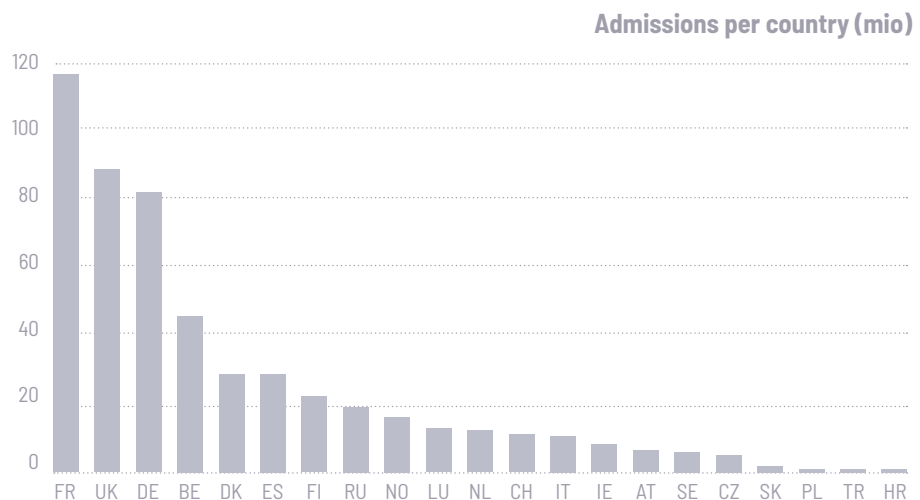
FIGURE 5
Annual admissions 2011-2017
in Europe for all European
children's films (478 films).



Annual admissions between 2011 and 2017 lie on average at 51 million admissions; which is on average approximately 10 million admissions (about 24%) more than in the period 2004-2013 covered by the previous study (Kanzler 2014, p. 18). The top 50 films generate 60% of the total revenue.

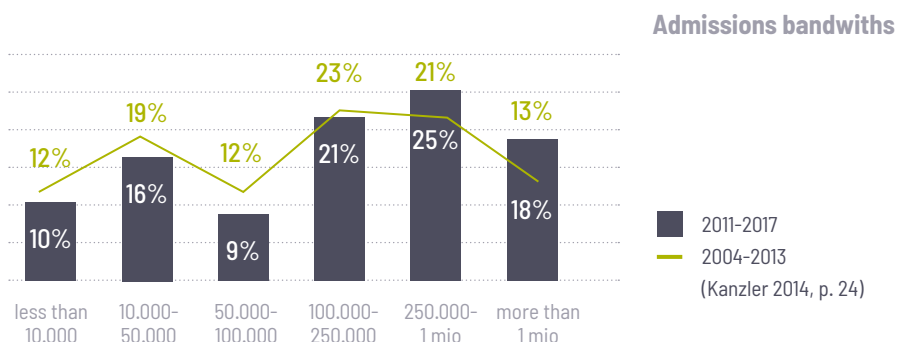
The five production countries with the most admissions are France, the United Kingdom, Germany, Belgium and Denmark, who together draw 71% of all admissions. The top 10 of the 35 countries draw nearly 90% of all admissions.

FIGURE 6
Admission figures for
2011-2017 per production
country. Since for co-
productions, admission
figures are allocated to
every country involved,
the figures do not represent
the real admissions
for that country but
express the scale and
proportion.



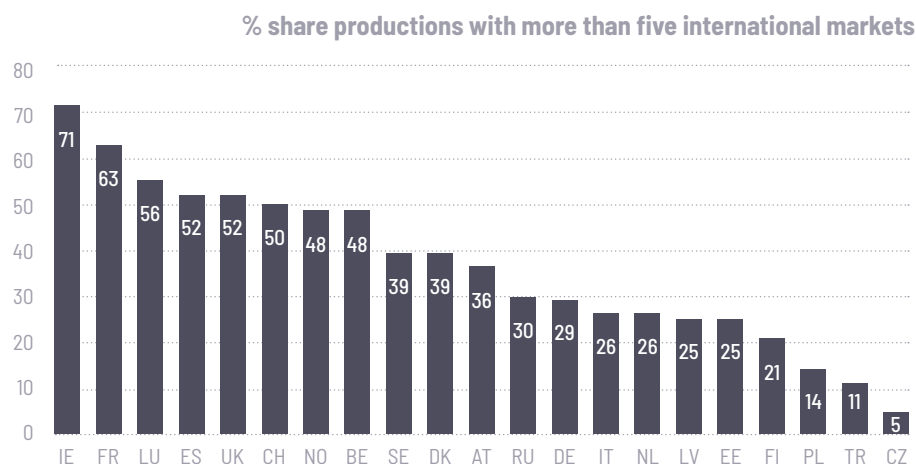
Admission figures are mainly in the bandwidth of 100.000 admissions or more. 87 films, i.e. 18 % of all films here included had more than one million admissions. As Figure 7 illustrates, it is particularly the share of the successful films with more than one million admissions that shows the biggest growth.

FIGURE 7
Admissions bandwidth
as compared to previous
study.



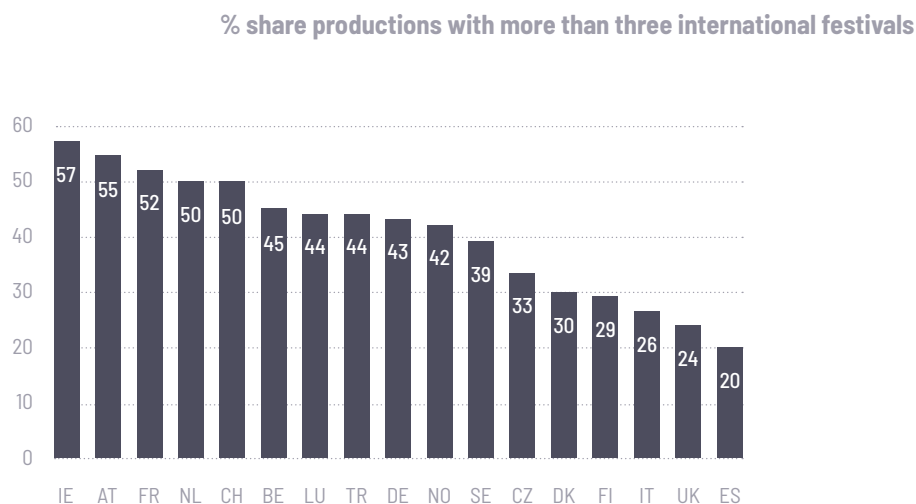
On average about 35% of the children's films produced in the period from 2011 to 2017 were very successful since they circulated in more than five markets outside their country or countries of origin. These about 35%, i.e. 165 films, generated 77% of all admissions. Broken down by country, the countries that were internationally particularly successful are Ireland, France, Luxembourg, Spain and the United Kingdom.

FIGURE 8
% shares of internationally successful films by country of production. Includes only countries that between 2011 and 2017 had produced/co-produced more than three films and for which admission figures were available.



Of the children films produced in the years from 2011 to 2016 (2017 was not included), about 45% were represented on more than three international festivals. These 188 films, i.e. about 45%, drew only 34% of all admissions, however. This confirms the widely accepted belief that successful festival films are not necessarily also popular with the audience.

FIGURE 9
% shares of successful festival films by country of production. Includes only countries that between 2011 and 2016 had produced/co-produced more than three films and for which admission figures were available.

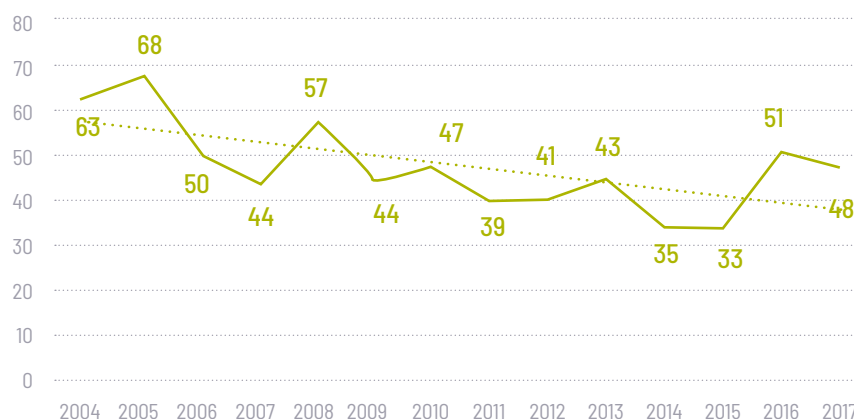


The development seen over the whole period also shows another trend. There are on average less and less films that are represented on more than three festivals even though the number of international festivals is continuously growing. This might be taken as evidence that prosperous festival participation becomes increasingly difficult to achieve. As festivals can be recognized as a qualitative success factor, this means that festivals themselves are part of a symbolic however more and more competitive distribution market also for children's films.



% share more than three festivals 2004-2017

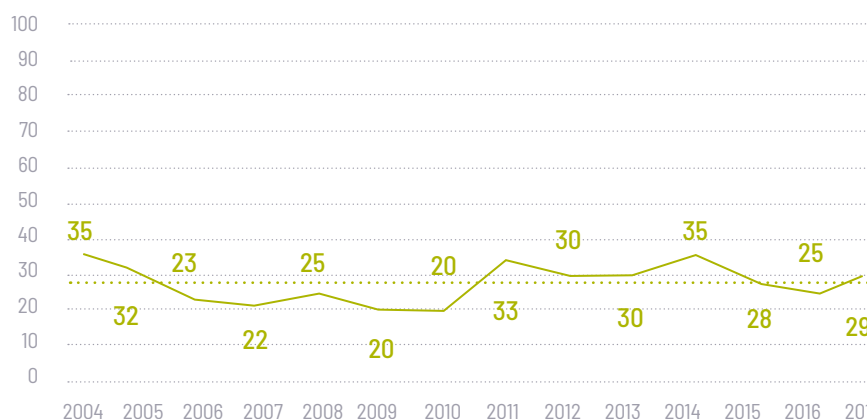
FIGURE 10
% shares of successful festival films 2004-2017.



Despite an increasing number of co-productions, there is surprisingly almost no visible trend for films with more than five international markets, i.e. the number of internationally successful films has risen only slightly.

% share more than five international markets 2004-2017

FIGURE 11
% shares of internationally successful films 2004-2017.



The development of admissions shows that for children’s films, productions and co-productions are on the rise but that admissions fall short of this increase (especially in relation to live action films, as will be shown later on). Although film productions are by themselves already important economic factors for any location where a film is made, a film is culturally, socially, politically and even economically relevant only if it reaches the greatest possible share of its specific audience. This given, it has to be said that policies and funding should not only focus on productions but that analyses and policy measures should give stronger consideration also to the distribution and exploitation of films, and to the situation of cinemas. We should thus not only take note of the problem of access to European children’s film productions but also of their visibility, especially on digital platforms. Peter Drake’s following assessment therefore also applies to the European children’s film because “audiences across Europe have access to European films, yet more often than not they choose not to see them, whether in the cinema, on television or on VoD. Clearly emerging models for digital distribution of films offer the potential to reach additional audiences across a range of those films, potentially offering European films greater visibility.” (Drake 2018, p. 101). We must in this context be critical of the so far almost non-existent availability of non-theatrical access figures at VoD platforms, for instance, without which adequate assessments on a film’s circulation and audience are by now almost impossible.

The situation of the children’s film can be described in even more detail if the films are analysed by format (live action vs. animation) and type of production (co-production vs. national production).

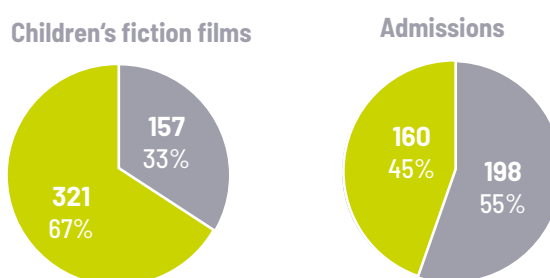


3. How have the formats of live action film and animation film been developing?

Of the 478 films that were produced in the period from 2011 to 2017 and of which admission figures are available, 321 were live action films and 157 animation films. Animations account therefore for one third of the total production volume and live action films for two thirds. Compared to the previous study, the share of animation film production fell, since in the period from 2004 to 2013, animations had had a share of 40% of all children's film productions. This ratio is however reversed when it comes to admissions, showing the extraordinary success the animation film enjoys. Animation films draw 55% of all admissions, live action films 45%. In the period from 2004 to 2013, animation films had held an admissions share of 46%. (compare Kanzler 2014, p. 4)

FIGURE 12 & 13
Production and admission volumes (admissions in million) of live action vs. animation films in the period 2011-2017.

- Animation
- Live Action

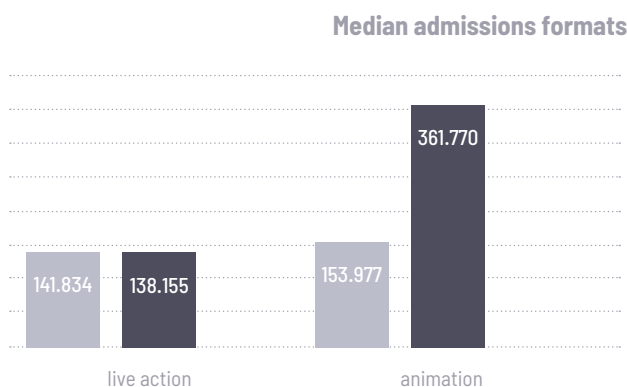


The difference between animation and live action films in median admissions is likewise considerable. Compared to the 2014 analysis (Kanzler 2014), median admissions generated by animations rose by 135% while falling by 3% for live action films. The median value is the middle value if all admissions are arranged in order. It therefore provides also insights into the individual admission figures' distribution.

On average, live action films generate 498.000 admissions, animations on average 1.3 million.

FIGURE 14
Median admissions by format.

- 2011-2017
- 2004-2013 (Kanzler 2014, p. 24)



The comparisons are however subject to methodological limitations because both studies differ in what they consider to be a live action vs. an animation film. The 2014 study includes the so called live-action animated hybrids in both categories. Live-action animated hybrids are films where a character (as for instance Findus in "Petterson and Findus") or a set are fully animated ("Labyrinthus"). In the present study, these films have without exception been included in the live action category only.



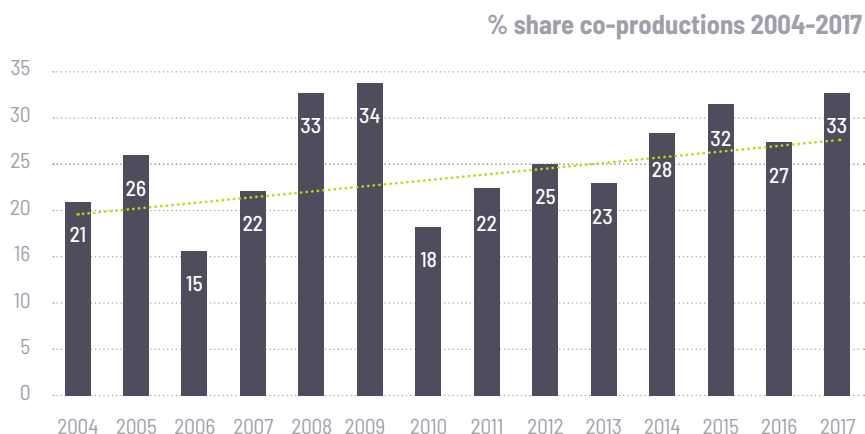
4. Are co-productions performing better than national productions?

Of the 478 films analysed, 145 were co-produced and 333 were national productions. Co-productions have in recent years been in the focus of public policy and funding grants and especially so in the course of the revision of the "Convention on Cinematographic Co-Production" adopted in 2017. (compare Talavera 2017)

As has already been said, the number of co-productions grew also in the children's film segment by enormous 52% compared to the 2004-2013/2014-2017 periods. The EAO studies emphasise above all that co-productions are particularly important for the smaller, and there particularly East European countries because they are the most important export films. (compare Talavera 2018; Cannes 2018; Talavera 2017). The question is whether this trend holds true for the children's film as well.

On average, co-productions account for 26% of children's film productions between 2007-2016. The average share of all fictional productions for the years 2007-2016 is 22% (Talavera 2017). The share of co-productions is therefore slightly greater for children's films. Over the years, this share has risen in contrast to total fictional production where the share of co-productions between 2007 and 2016 remained relatively stable. (compare Talavera 2017, p. 5)

FIGURE 15
% shares of co-productions
in total children's film pro-
duction.



However, there are large differences between the countries' production activities. Especially the smaller countries account for a much greater share of co-productions.



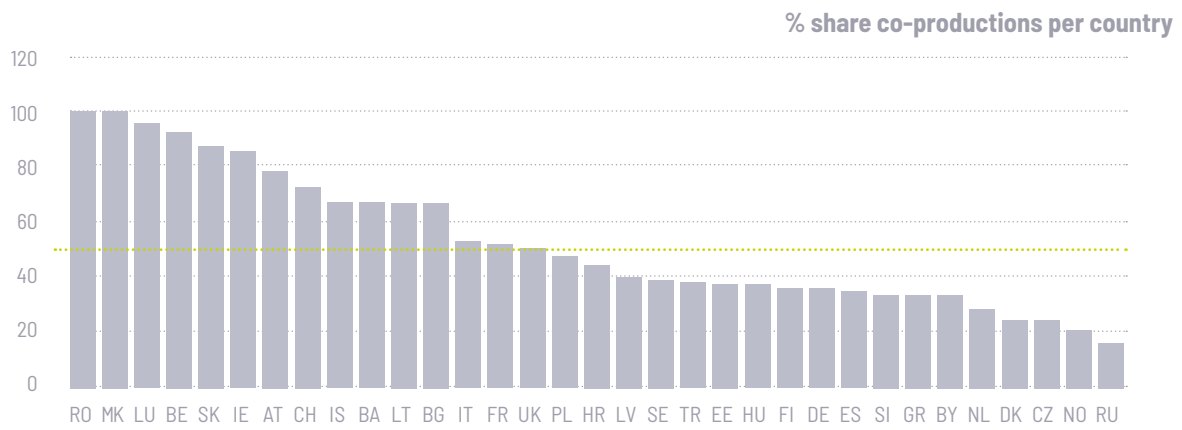


FIGURE 16 % share of co-productions 2004-2017 by country.

In view of these figures, we next have to examine admissions for co-productions. If a country can be considered successful with the co-produced children's films, its share of admissions for co-productions would have to be higher than its share of co-productions as compared to the total volume. These figures have been computed for the years from 2011 to 2017 only.

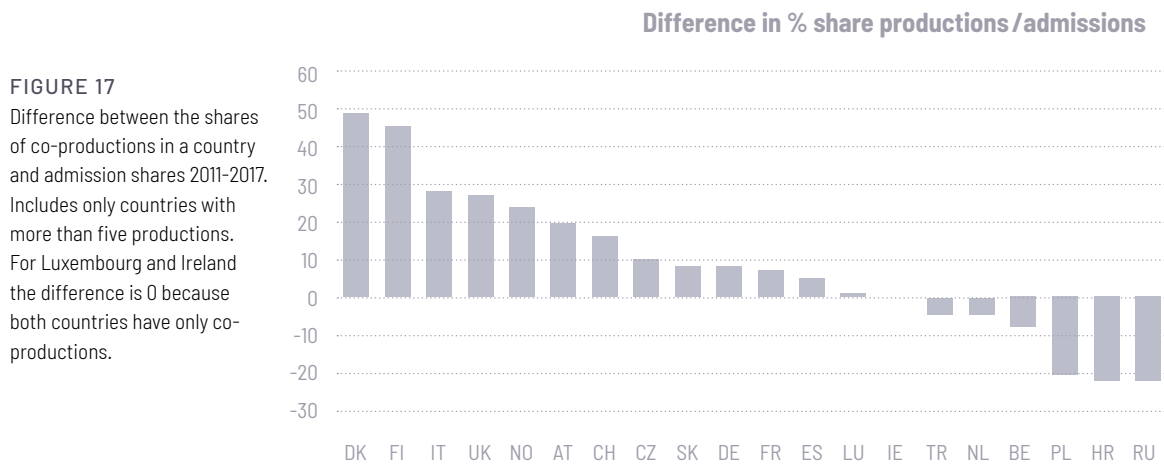


FIGURE 17 Difference between the shares of co-productions in a country and admission shares 2011-2017. Includes only countries with more than five productions. For Luxembourg and Ireland the difference is 0 because both countries have only co-productions.

It becomes apparent that specifically Denmark, Finland, Italy, the United Kingdom and Norway can be considered to have successful co-productions. Countries like the Netherlands, Belgium and Poland perform better in admissions for national productions.

Looking at admission figures as a whole, the mean values show a large difference between admissions for either national or co-productions. Median admissions are however relatively equal. This means that the high admission figures relate to only a few number of productions, i.e. as little as 8% of co-productions or, in other words, twelve of 145 films, generate 63% of the admissions.

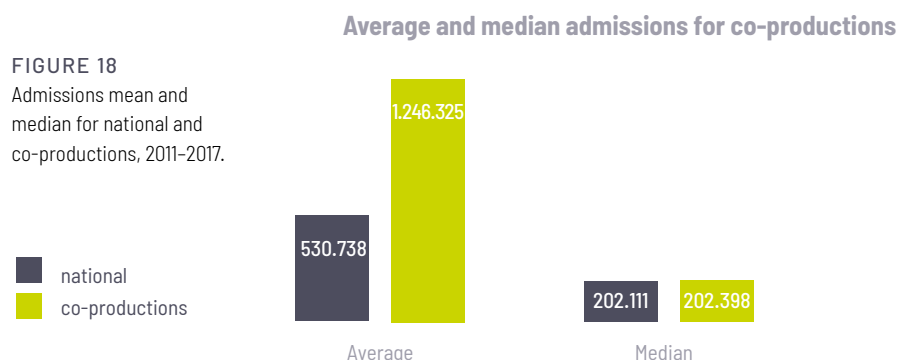


FIGURE 18 Admissions mean and median for national and co-productions, 2011-2017.

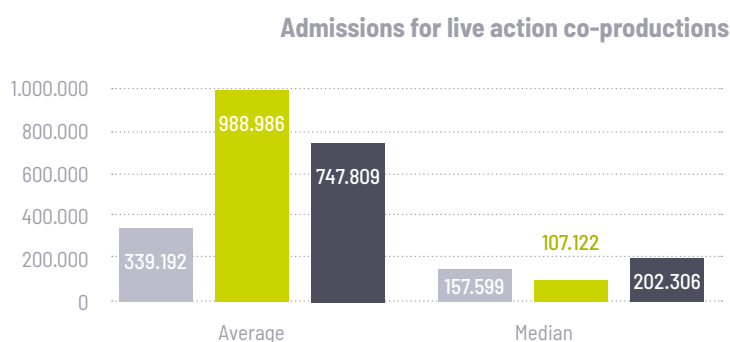
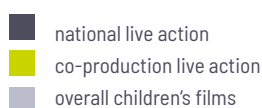


This becomes even more apparent in co-produced live action films, which have significantly higher admissions than nationally produced live action films. However, median admissions of co-produced live action films are by nearly one third lower than those of nationally produced films. This means that there is a relatively small number of high performing co-produced live action films where the concentration of admissions and profits is very high. Five films (6% of the co-produced live action films) generate nearly 72% of admissions. A large percentage of co-produced live action films must therefore generate revenue that is far below average (Figure 19). This is why it has to be said that, especially for live action films, it is certainly true that co-productions contribute to facilitate geographically wider and, in total, higher funding and that their underlying potential to open up new markets is also evident, but the conclusion that co-productions generate higher admissions because they are better in penetrating other international markets (compare Talavera 2017) certainly needs to be questioned, at least for the European live action children's film.

The very detailed EAO study of 2017 on co-productions (compare Talavera 2017, Iris plus 2018, Talavera 2018) refers also to this aspect although focusing its arguments on export and admission performance of international co-productions. Talavera firstly argues, "Since most co-productions reflect the fact that the project has greater prospects of reaching a more global or multi-regional audience, the fact that co-productions circulate better and gross more appears to be a self-fulfilling prophecy and not necessarily a recipe for success" (Talavera 2018, p.39) He then too points out that the economic and international benefit of national productions should not be underestimated, "Although it is true that co-productions account for more admissions than purely domestic films, when we look at the figures for films with more than 20.000 admissions in foreign markets, we see that 76% of purely national films were above that threshold, compared to only 69% of co-production. [...] By and large, once a purely domestic film is released in a foreign market, a minimum performance is to be expected." (Talavera 2018, p. 42) With regard to the European children's film it is similarly obvious that here too, there are strong national productions that will go a long way.

FIGURE 19

Admissions for co-produced live action films compared to national live action and overall children's films (including animations), 2011-2017. No available statistics for comparison with all feature films.



In the trajectory of these findings, the study now asked whether co-productions travel better internationally and how they perform at festivals. We found that co-productions have relatively more often more than five international markets because while 28% of all productions have on average more than five non-national markets, for co-productions this percentage amounts to 40%. This difference is significantly smaller for festival participation where 47% of all films, compared to 53% of co-productions, travelled on more than three international film festivals.



5. Who are the child protagonists in European children's films?

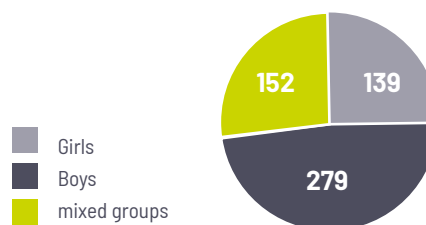
This question deals with the gender distribution of child lead roles and looks at the share of protagonists with another cultural background than that of the countries of production. The results of this analysis shall contribute to the societal discourse on diversity and gender which is by now widely held also in the European film industry and which is starting to become the subject of analysis (compare, for instance, the study of Elisabeth Prommer and Christine Linke on "Audiovisuelle Diversität? Geschlechterdarstellungen in Film und Fernsehen in Deutschland" [Audiovisual diversity? Gender representation in German film and TV]).

In order to answer this question, the synopses of 570 live action films produced between 2004 and 2017 were analysed by content analysis. The focus was on analysing as far as possible only those films which, due to their media form, have a stronger reference to social reality. These are live action films which, as fictional films, are of course creative interpretations of reality but, because of their production method, re-represent a child's environment somewhat stronger than animations do. Animation films create already by their very appearance (hand-drawn, digitally animated etc.) a distance to perceivable reality. This distance is part of their reception. For this reason, the analysis does not include any films that were classified as live action animated hybrids. Other films had to be excluded because the available content descriptions were not sufficient for such an analysis. The analysis follows methodically Werner Früh's content analysis (Früh 2017).

279 (49%) of the 610 films analysed have male protagonists. They may be individual protagonists, a pair, or a group of children. 24%, i.e. 139 films, have female protagonists. In 27%, i.e. in 152 films, the story centred on a mixed group of children. Gender distribution is therefore in no way balanced.

FIGURE 20
Protagonists by gender (2004–2017)

Protagonists of live action films 2004–2017



Only 16 films, which is 2.8% of all children's film productions, have protagonists with a cultural background that is different from that in the countries of production. In summary, it can be concluded from this rather film sociological analysis that, in the European children's film, the child is predominantly white and male.

However, diversity within film productions must be ascertained and discussed on the basis of many other parameters. First and foremost is cultural diversity which is apparently automatically brought about by increasing international co-producing activities. This at least is the fundamental view taken by European policy makers when they believe that "co-production fosters the stimulation and circulation of creativity; strengthens cultural ties between communities of film professionals and artists; and helps spread core values such as pluralism and freedom of expression across countries" (Iris plus 2018, p. 68). Since the early 2000s however, this prospect is under discussion, especially in terms of the opportunities and challenges for minority versus majority co-production partners (compare here the extremely useful publication on European co-productions by Hammett-Jamart, Petar Mitric and Eva Novrup Redvall as well as the results and publications of the MeCETES international project (Mediating Cultural Encounters Through European Screens)). These aspects will continue to be the subject of detailed analysis.



Appendix

Literature

Cannes 2018: INTERNATIONAL FILM CO-PRODUCTION IN EUROPE. A EUROPEAN AUDIOVISUAL OBSERVATORY PUBLICATION. presentation at Cannes, May 2018

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Talavera 2017: FILM PRODUCTION IN EUROPE - PRODUCTION VOLUME, CO-PRODUCTION AND WORLDWIDE CIRCULATION, European Audiovisual Observatory, Strasbourg 2017.



App 1: Countries of OBS-Europe

AL - Albania

AM - Armenia

AT - Austria

BA - Bosnia and Herzegovina

BE - Belgium

BG - Bulgaria

CH - Switzerland

CY - Cyprus

CZ - Czech Republic

DE - Germany

DK - Denmark

EE - Estonia

ES - Spain

FI - Finland

FR - France

GB - United Kingdom

GE - Georgia

GR - Greece

HR - Croatia

HU - Hungary

IE - Ireland

IS - Iceland

IT - Italy

LI - Liechtenstein

LT - Lithuania

LU - Luxembourg

LV - Latvia

MA - Morocco

ME - Montenegro

MK - North Macedonia

MT - Malta

NL - Netherlands

NO - Norway

PL - Poland

PT - Portugal

RO - Romania

RU - Russian Federation

SE - Sweden

SI - Slovenia

SK - Slovak Republic

TR - Turkey



App 2: Children's film productions 2004-2017 per country

country (iso-code)	Total children's fiction films	coproductions	national	% share of coproductions
DE	234	83	151	35%
FR	142	74	68	52%
NL	98	28	70	29%
DK	95	23	72	24%
UK	69	35	34	51%
NO	67	14	53	21%
BE	65	60	5	92%
SE	59	23	36	39%
ES	49	17	32	35%
CZ	46	11	35	24%
RU	45	7	38	16%
FI	42	15	27	36%
IT	36	19	17	53%
LU	24	23	1	96%
AT	23	18	5	78%
CH	22	16	6	73%
PL	15	7	8	47%
IE	14	12	2	86%
TR	13	5	8	38%
HR	9	4	5	44%
EE	8	3	5	38%
HU	8	3	5	38%
SK	8	7	1	88%
IS	6	4	2	67%
LV	5	2	3	40%
BA	3	2	1	67%
SI	3	1	2	33%
GR	3	1	2	33%
LT	3	2	1	67%
BG	3	2	1	67%
BY	3	1	2	33%
RO	2	2	0	100%
MK	2	2	0	100%
PT	1	0	1	0%
GE	1	0	1	0%



App 3: 20 bestselling children's films 2011-2017

Paddington Bear	UK/FR	2014	Cross-Over
Cinderella	US/UK	2015	Live Action
The Angry Birds Movie	FI/US	2016	Animation
Paddington 2	UK/FR	2017	Cross-Over
The Lego Movie	US/AU/DK	2014	Animation
Shaun the Sheep Movie	UK	2015	Animation
Arthur Christmas	UK/US	2011	Animation
The Little Prince	FR/US	2015	Animation
Ballerina	FR	2016	Animation
Gnomeo & Juliet	UK	2011	Animation
The Pirates! In an Adventure with Scientists!	UK/US	2012	Animation
Houba! On the Trail of the Marsupilami	FR	2011	Cross-Over
A Monster Calls	ES/US	2016	Live-Action
The House of Magic	BE	2013	Animation
Tad Jones 2: The Secret of King Midas	ES	2017	Animation
The Bigfoot Junior aka Son of Bigfoot	BE/FR	2017	Animation
Three Warriors on Distant Shores / Three Heroes on Distant Shores	RU	2012	Animation
Maya the Bee "Movie"	DE/AU	2014	Animation
Nicholas on Holiday	FR/BE	2014	Live-Action
Tad The Lost Explorer	ES	2012	Animation

App 4: Children's film % share of total feature film productions per country

Country	% share 2004-2013 (Kanzler 2014, p. 16)	% share 2014-2017
DK	22	19
LU	23	13
NO	20	12
RU	3	12
NL	19	11
SE	14	9
BE	8	9
DE	15	7
FI	14	6
CZ	10	6
FR	5	4
AT	5	3
UK	4	3
IT	2	2
CH	2	2
ES	6	1

