



**OBSERVATOIRE EUROPEEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSTELLE**

**ANDRE LANGE
Head of Department
for Information on Markets & Financing**

**The distribution of European feature
animation films –
Theatrical, DVD, TV**

**Cartoon Master, Potsdam, 26-28
October 2006**

OBJECTIVES OF THIS PRESENTATION

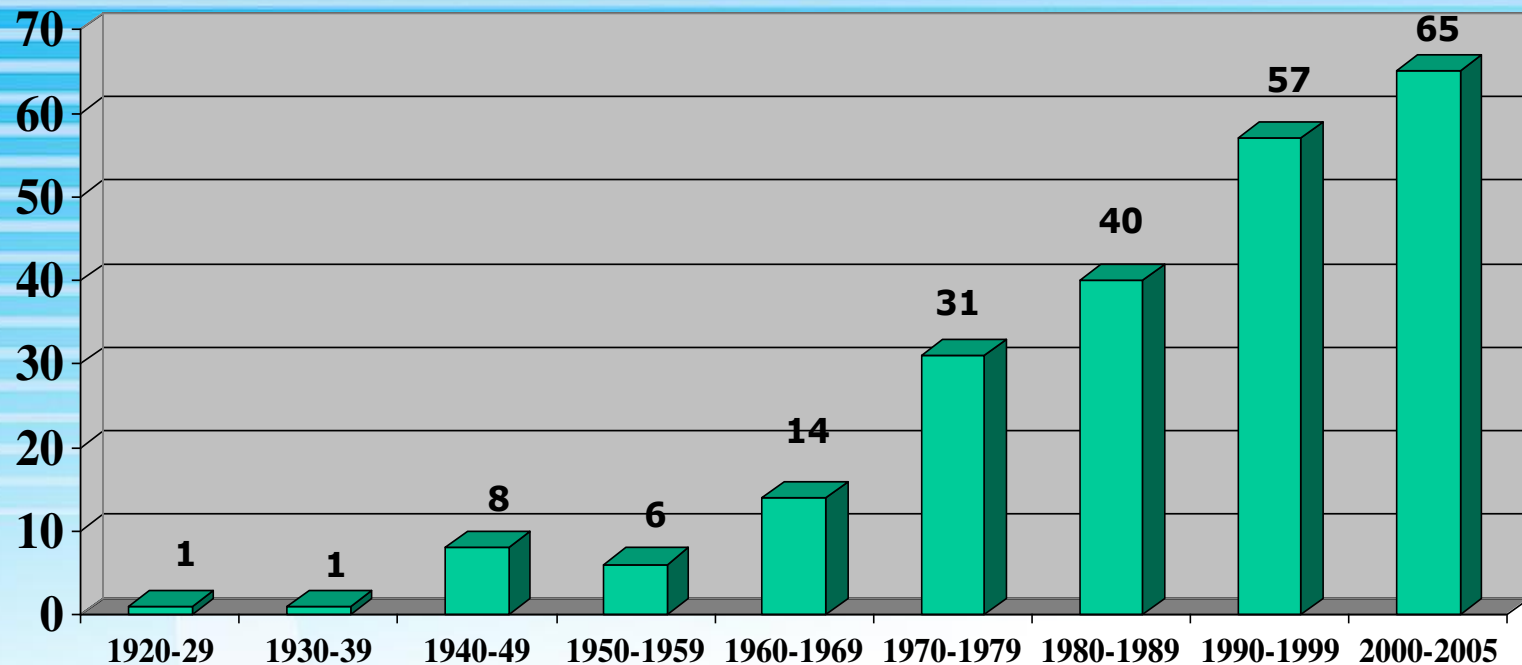
- **TO ILLUSTRATE THE STRATEGIC IMPORTANCE OF ANIMATION FEATURE FILMS FOR THE EUROPEAN FILM INDUSTRY**
- **TO ANALYSE SUCCESS IN FILM, TV AND DVD DISTRIBUTION**
- **TO ANALYSE SUCCESS WITHIN NATIONAL AND EUROPEAN MARKETS**

10 YEARS OF THEATRICAL DISTRIBUTION OF ANIMATION FEATURE FILMS IN EUROPE (1996-2005)

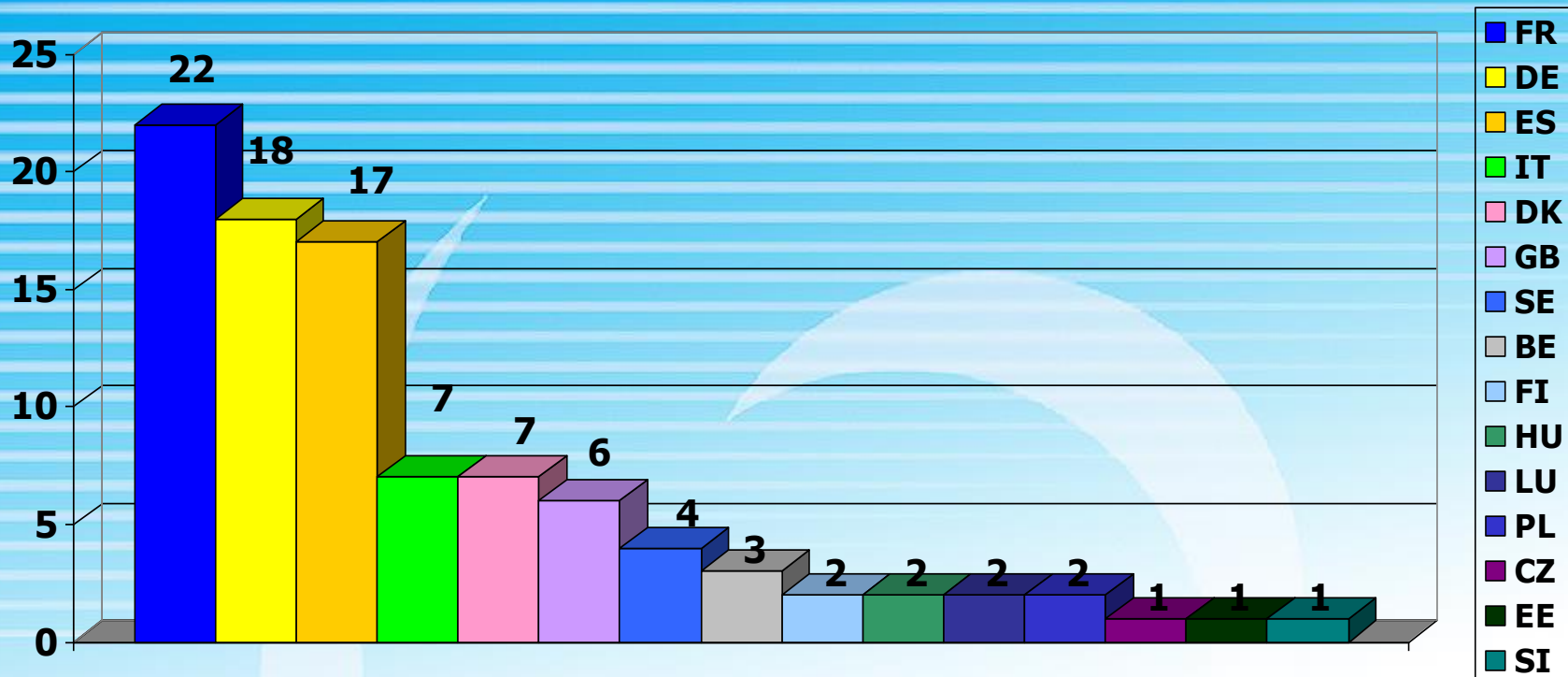
- **332 animation films in theatrical distribution (all origin)**
- **230 produced during the period and 102 before 1996**
- **765 million admissions on a total of 8,1 billion**
- **9,4 % of all admissions in EUR 25 during the period**

PRODUCTION OF EUROPEAN ANIMATION FEATURE FILMS (1926-2005)

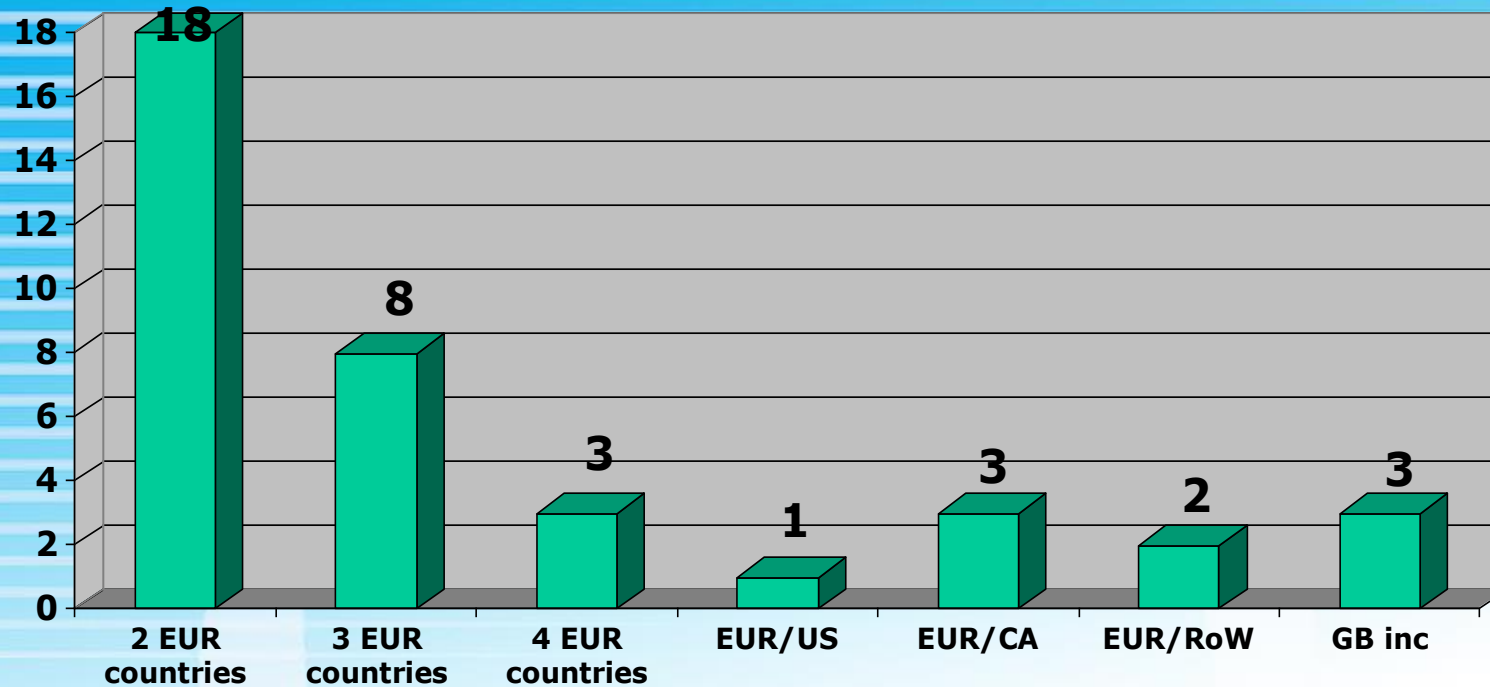
Sources : Cartoon till 1999, LUMIERE for 2000-2005



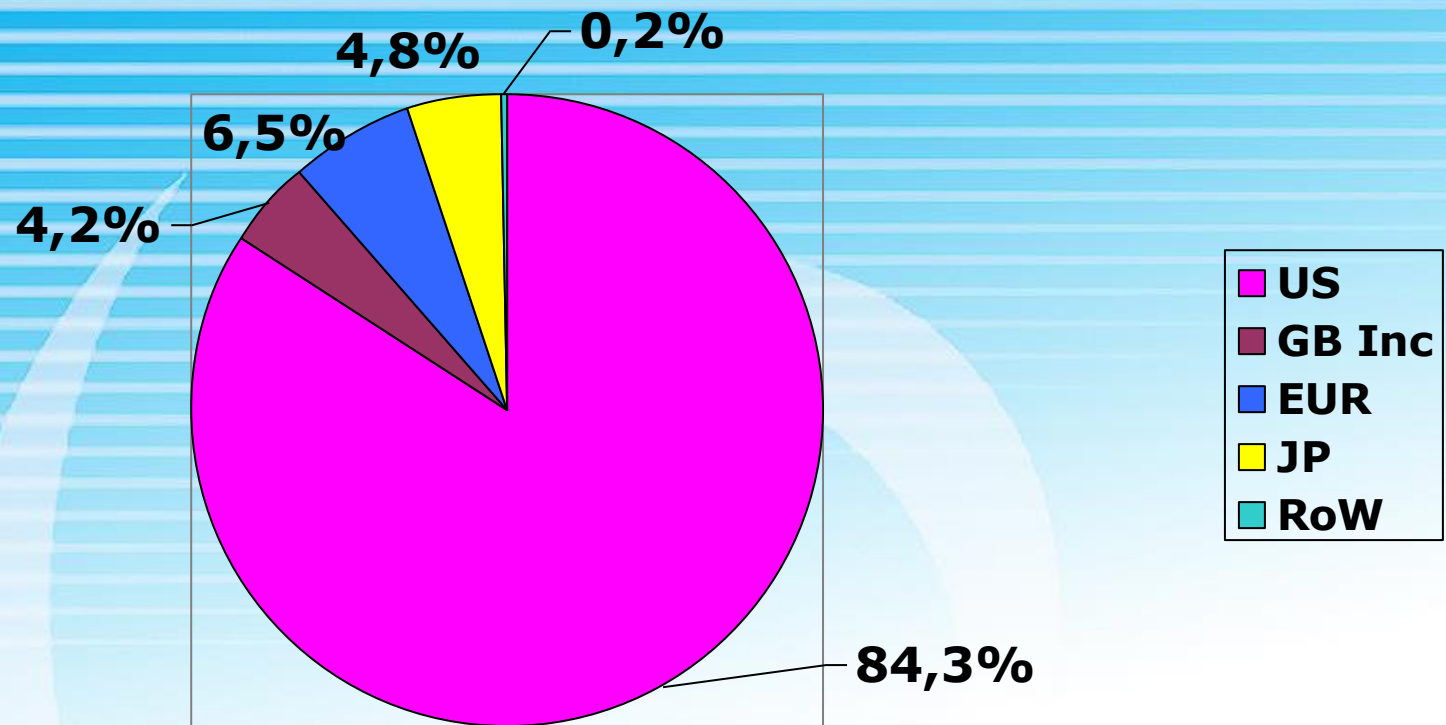
ORIGIN OF 95 EUROPEAN ANIMATION FILMS WITH THEATRICAL RELEASE DURING 1996-2005



CO-PRODUCTION OF RELEASED ANIMATION EUROPEAN FEATURE FILMS (1996-2005)



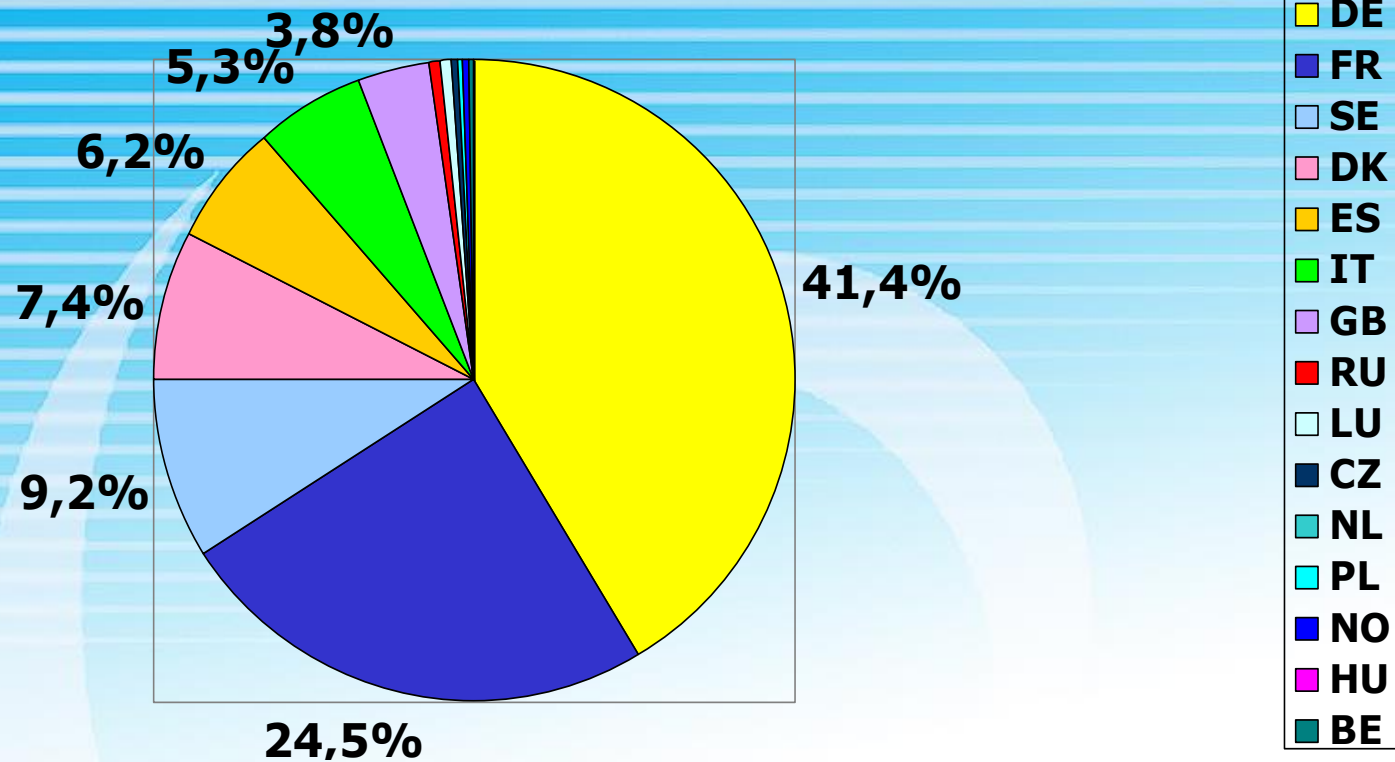
MARKET SHARE OF ANIMATION FEATURE FILM ADMISSIONS IN THE EUROPEAN UNION (765 million admissions for 332 films) (1996-2005)



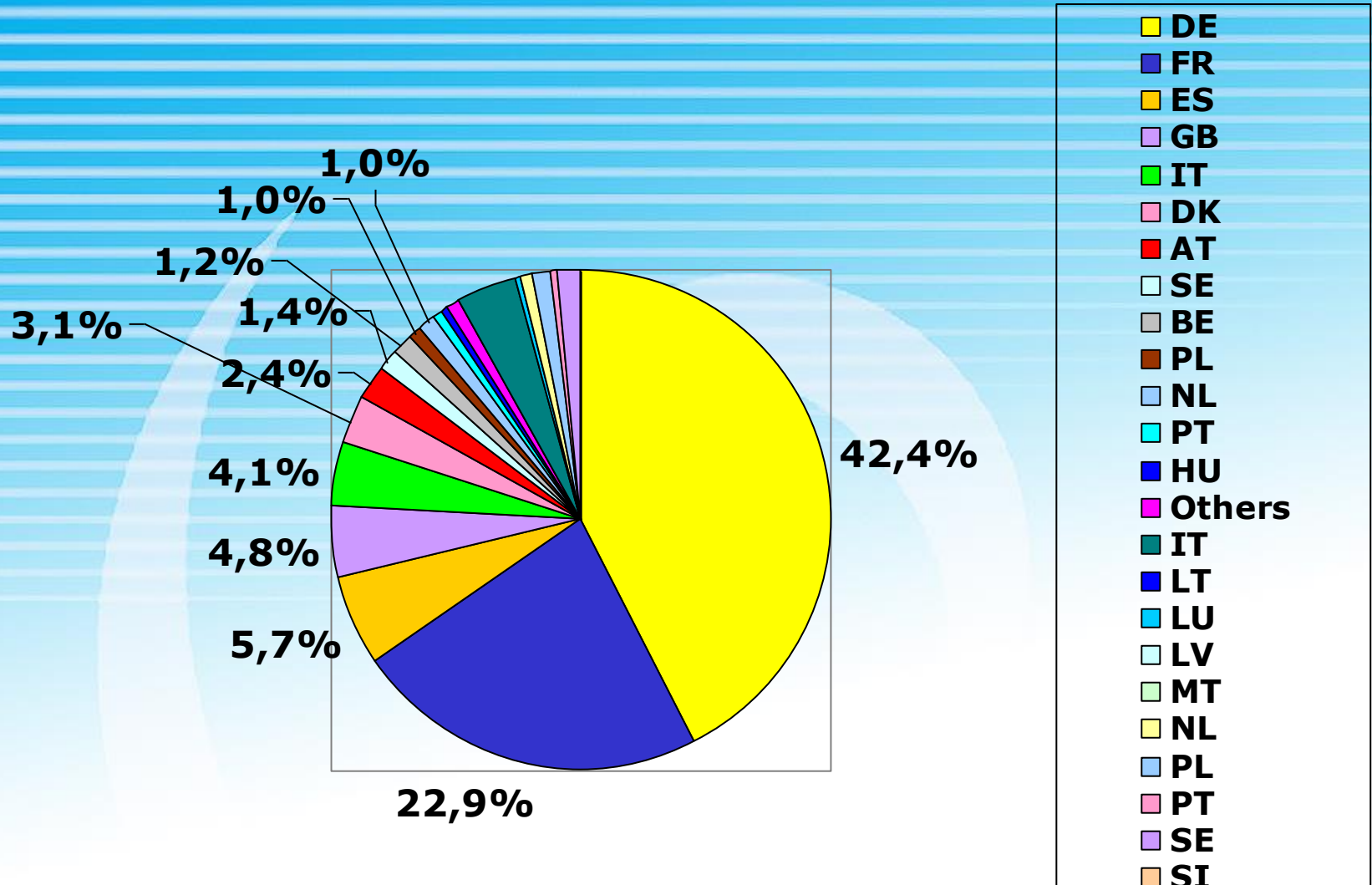
CIRCULATION OF EUR25 ANIMATION FILMS IN EUR 25 (1996-2005)

- 140 EUR25 animation films in distribution in EUR25 for a total of 8 926 EUR25 films in distribution (1.6 %)
- 49,4 million admissions for EUR25 animation films for a total of 2.03 billion admissions for EUR25 films (2.4%)

BREAKDOWN OF THE 49.2 MILLION ADMISSIONS FOR EUROPEAN FILMS IN EUR25 BY COUNTRY OF ORIGIN (1996-2005)



BREAKDOWN OF ADMISSIONS FOR EUROPEAN ANIMATION FILMS BY TERRITORY (1995-2006)



THE 10 MOST SUCCESSFUL ANIMATION FILMS BY ADMISSIONS IN EUR 25 (1996-2005)

Shrek 2	US	2004	42 735 475
Finding Nemo	US	2003	42 589 032
Tarzan	US	1999	30 240 838
Madagascar	US	2005	27 882 701
The Incredibles	US	2004	27 352 678
Toy Story 2	US	1999	24 791 683
The Hunchback of Notre Dame	US	1996	24 178 730
Monsters, Inc.	US	2001	23 453 959
Shrek	US	2001	23 135 843
Ice Age	US	2002	21 856 350

THE GB inc/US ANIMATION FILMS BY ADMISSIONS IN EUR 25 (1996-2005)

Chicken Run	GB INC / US	2000	15 379 356
Wallace & Gromit in The Curse of the Were-Rabbit	GB INC / US	2005	12 518 585
Valiant	GB INC / US	2005	4 625 024
The Corpse Bride	US / GB INC	2005	4 224 187

THE 10 MOST SUCCESSFUL EUROPEAN ANIMATION FILMS BY ADMISSIONS IN EUR 25 (2003-2005)

Sprung! The Magic Roundabout	FR / GB	2005	2 278 971
Lauras Stern	DE / BG	2004	1 694 273
Kirikou et les bêtes sauvages	FR	2005	1 419 679
Der kleine Eisbär 2 - Die geheimnisvolle Insel	DE	2005	1 331 121
Felix - Ein Hase auf Weltreise	DE / IT	2005	1 220 782
La prophétie des grenouilles	FR	2003	1 161 960
Till Eulenspiegel	DE / BE / GB	2003	868 724
Los reyes magos	ES / FR	2003	803 130
El Cid: La leyenda	ES	2003	649 827
Zurück nach Goya	DE / GB / ES	2004	412 700

**STUDY OF A SAMPLE OF 29
EUROPEAN FILMS PRODUCED IN 2003-2005
8 MARKETS ANALYSED**

DATA COLLECTED ON:

- **Admissions figures (Source: database LUMIERE) + 2006 figures when available**
- **Sales of DVD (Source : Mediacontrol-GfK)
2003- sept. 2006**
- **Date, time, share and ratings on TV (Source : Eurodata-TV) (data available for 9 countries)**

METHODOLOGICAL ISSUES

Admissions (LUMIERE) : 85 % of coverage for EUR 25, gaps in Italy, Greece,...

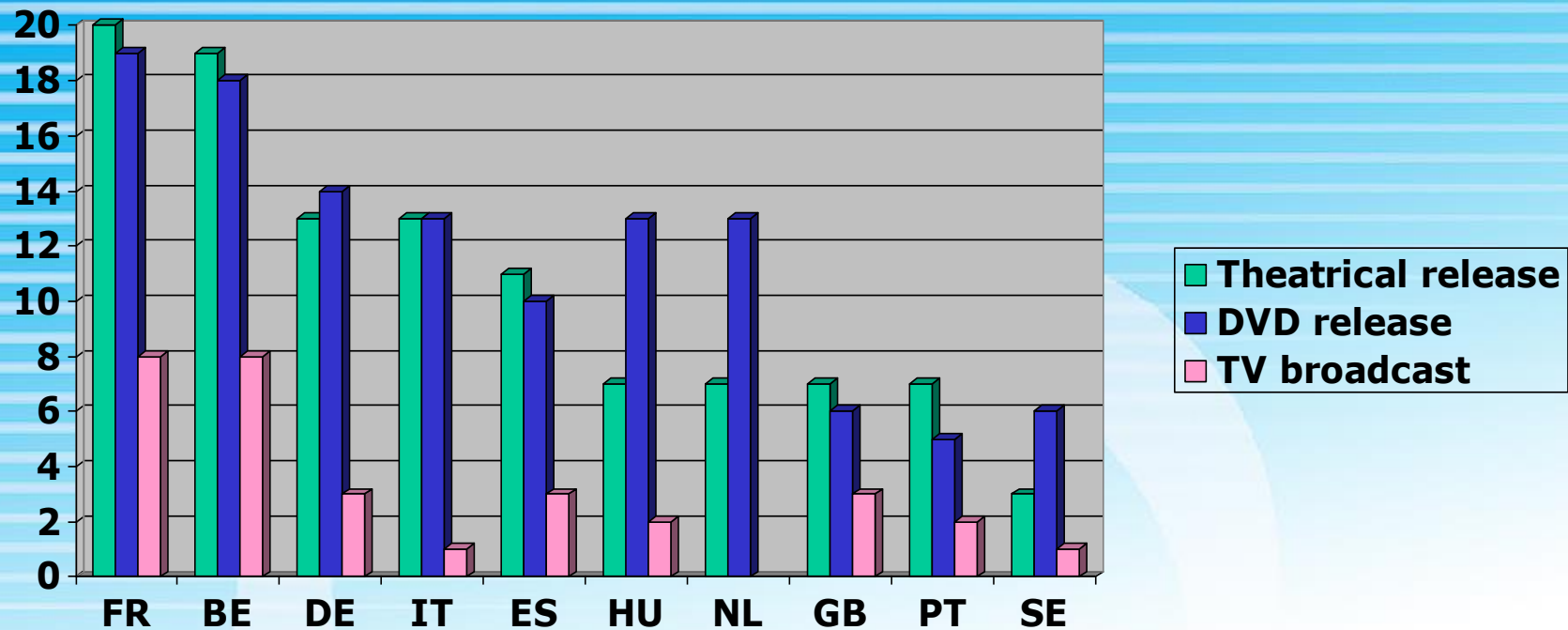
DVD (Mediacontrol-GfK) : sales monitored through bar codes, identification of titles, coverage from 70 to 90% of the market, according to countries, consolidation necessary

Audience : data collected by national audience institutes, classical issues of sampling, harmonisation, identification of films, absence of data on pay-TV in various countries

29 ANIMATION FILMS IN 10 TERRITORIES

- **Territories: BE, DE, ES, FR, GB, IT, HU, NL, PT, SE**
- **98 theatrical releases on 290 possibilities (33.8 %)**
- **110 DVD releases on 290 possibilities (37.9%)**
- **31 TV broadcasts on 261 possibilities (11,9 %)**
- **31,1 million admissions**
- **4,4 million DVDs sold (14 % of admissions)**

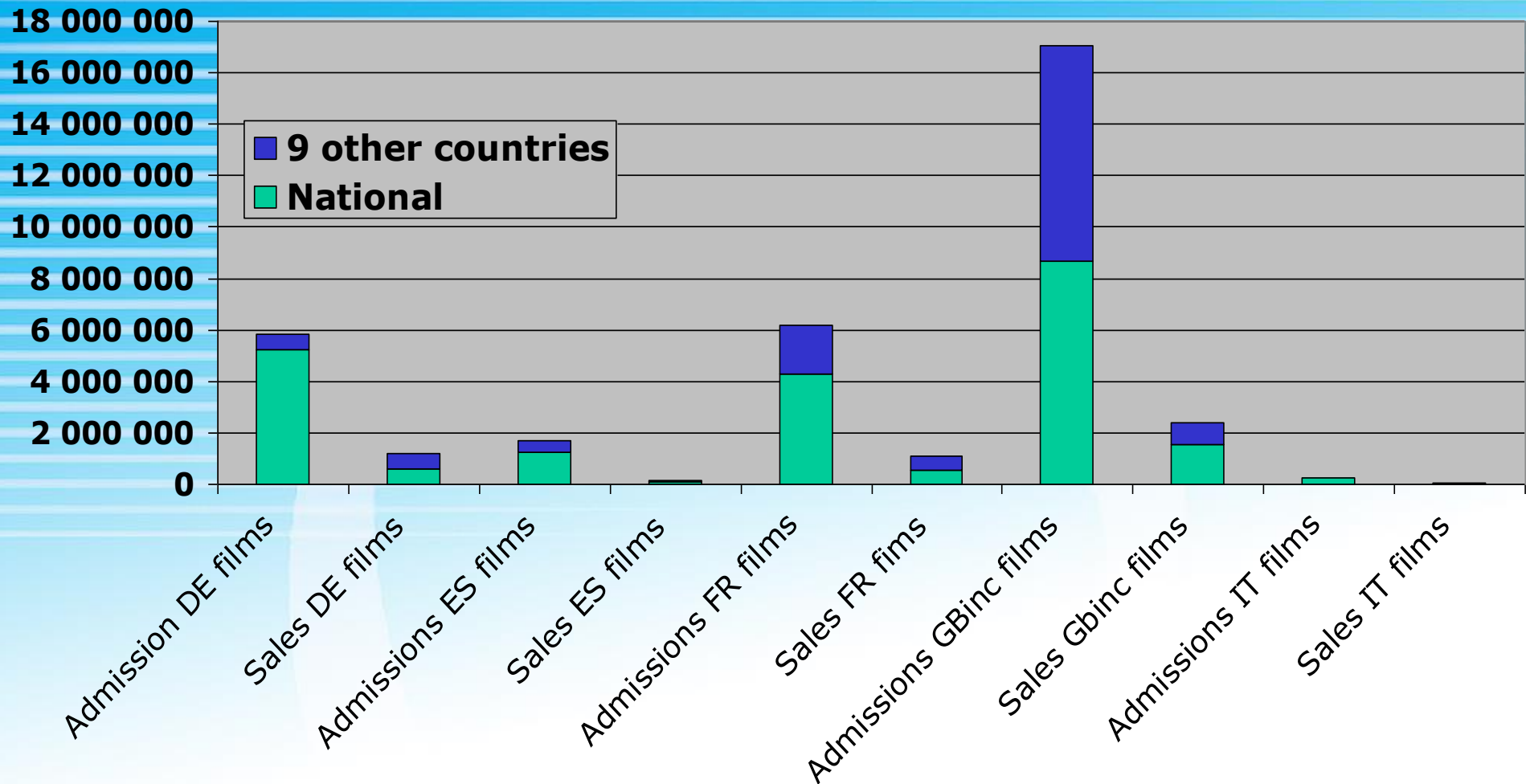
NUMBER OF THEATRICAL, DVD AND TV RELEASES OF THE 29 SAMPLE TITLES BY COUNTRY



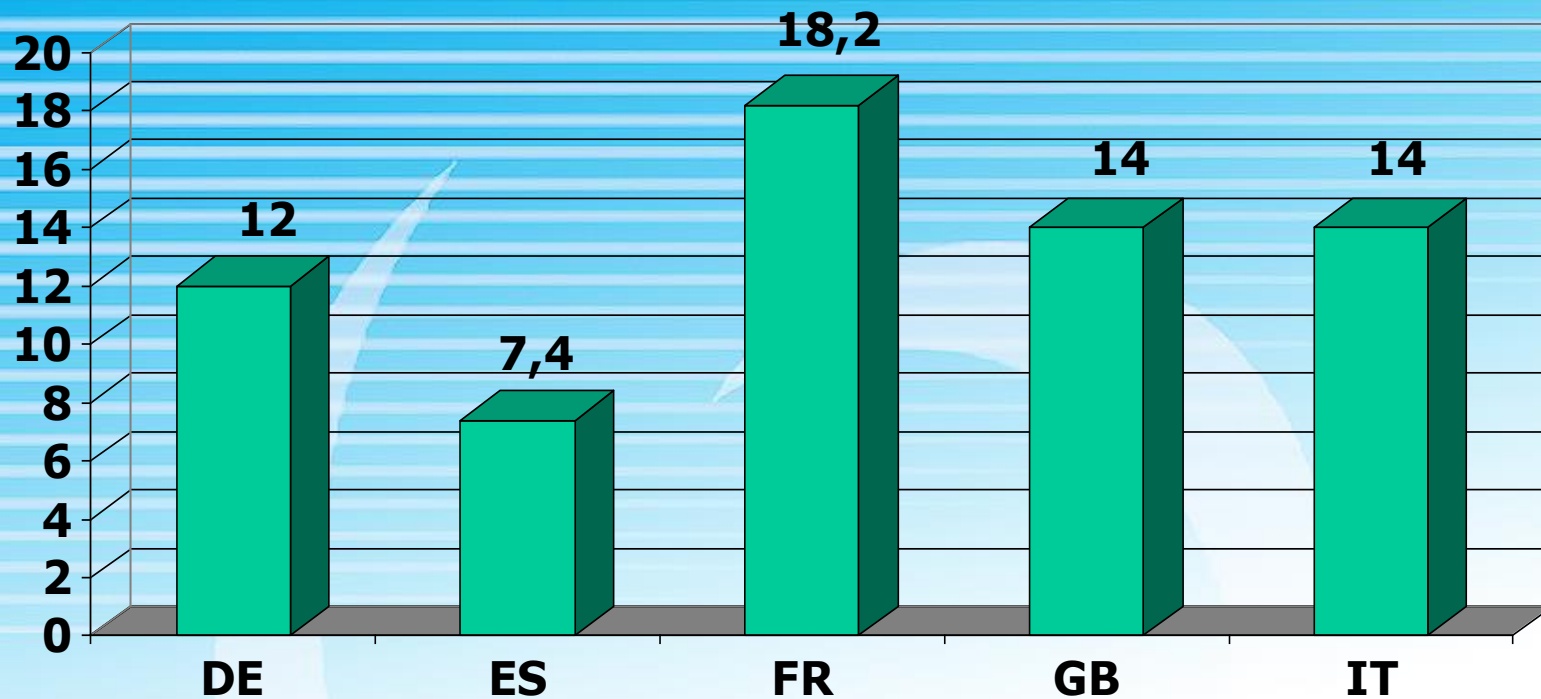
10 SAMPLE FILMS WITH THE BEST EXPOSURE

	Nb countries with theatrical releases	Nb countries with DVD release	Admissions in 8 countries	Nb countries With TV broadcast	% DVD sales/ admissions
Wallace & Gromit in The Curse...	8	8	12 781 033	0	11,8%
Valiant	7	7	4 269 347	2	20,8%
La prophétie des grenouilles	7	6	1 135 209	4	7,3%
El Cid: La leyenda	7	7	636 533	1	10,1%
Zurück nach Gaya	7	5	400 129	1	64,4%
Kirikou et les bêtes sauvages	6	7	1 430 335	0	9,6%
Sprung! The Magic Roundabout	5	6	2 440 025	3	28,1%
Lauras Stern	4	6	1 614 303	0	14,4%
Der kleine Eisbär 2	4	3	1 379 721	0	4,3%
Le chien, le général et les oiseaux	4	7	224 233	1	7,6%

ADMISSIONS AND DVD SALES BY COUNTRY OF ORIGIN OF THE SAMPLE FILMS



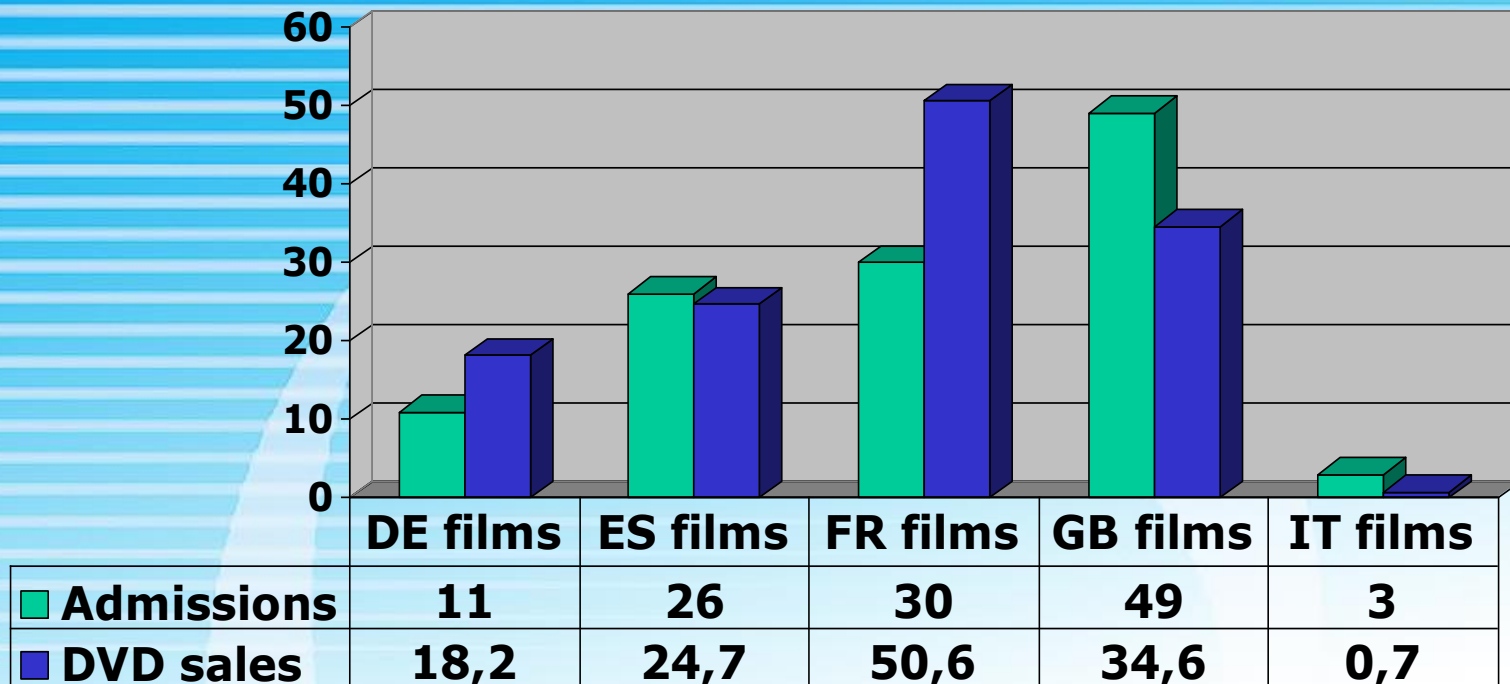
DVD / ADMISSIONS RATIO BY COUNTRY OF ORIGIN OF THE SAMPLE FILMS



EXPORTS OF THE SAMPLE FILMS (in the 9 other countries of the sample)

- 11,4 million of admissions are outside of the country of origin (37 % of admissions in the sample 10 countries)
- 1,5 million of DVD sales are outside of the country of origin (35,1 % of sales in the sample 10 countries)
- DVD exports ratios are better than admissions export ratio for German and French films
- DVD exports ratios are lower than admissions export ratio for GBinc films (but Wallace and Gromit released in DVD only in sept 2006 in Italy)

ADMISSIONS AND EXPORTS RATIOS FOR SAMPLE FILMS (foreign / total sample)



LA PROPHETIE DES GRENOUILLES – RELEASE SCHEDULE

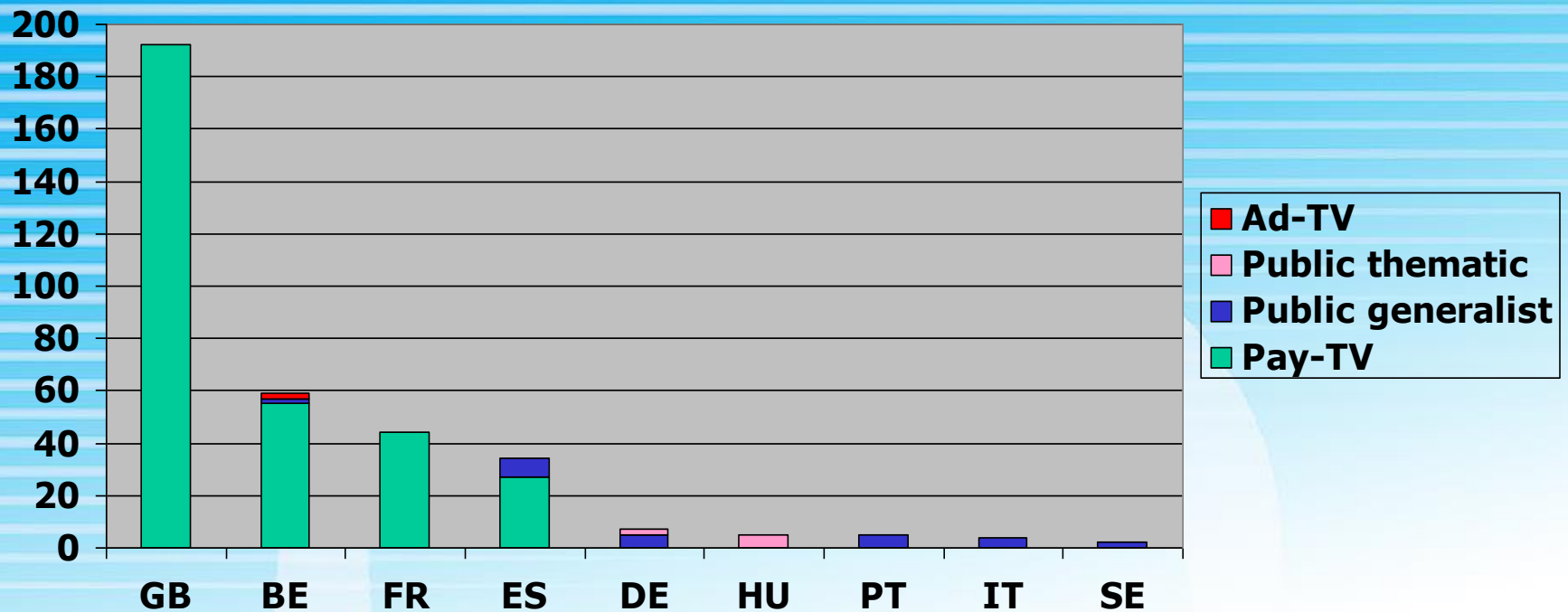
	Theatrical	DVD	TV
BE	10.12.2003	22.06.2004	5.12.2004
DE	4.11.2004	9.05.2005	17.04.2006
ES	7.12.2005	20.09.2006	–
FR	3.12.2003	22.06.2004	19.12.2004
HU	16.12.2004	03.2005	1.01.2006
IT	15.10.2004	29.11.2004	–
SE	7.01.2005	18.05.2005	–

LA PROPHETIE DES GRENOUILLES –
Release windows
(in days from day 1, theatrical release in France)

	Theatrical	DVD	TV	VoD
FR	0	202 (202)	382 (180)	?
BE	7	202 (195)	368 (164)	?
IT	317	362 (45)	?	?
DE	337	523 (186)	866 (343)	?
HU	379	454 (77)	760 (306)	?
SE	401	532 (131)	?	?
ES	735	1022 (297)	?	?

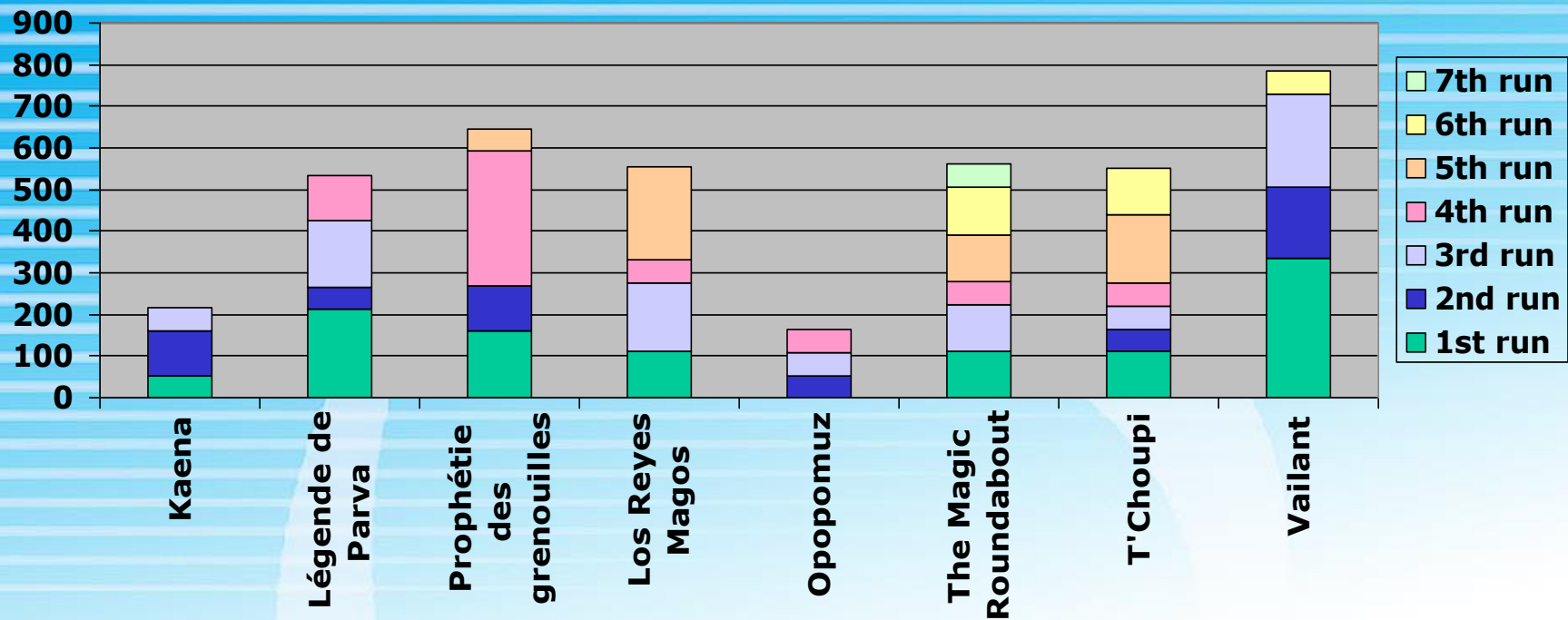
NUMBER OF BROADCAST OF THE SAMPLE FILMS IN 9 COUNTRIES

(Pay-TV channels are not analysed for DE, HU, PT, IT, SE)

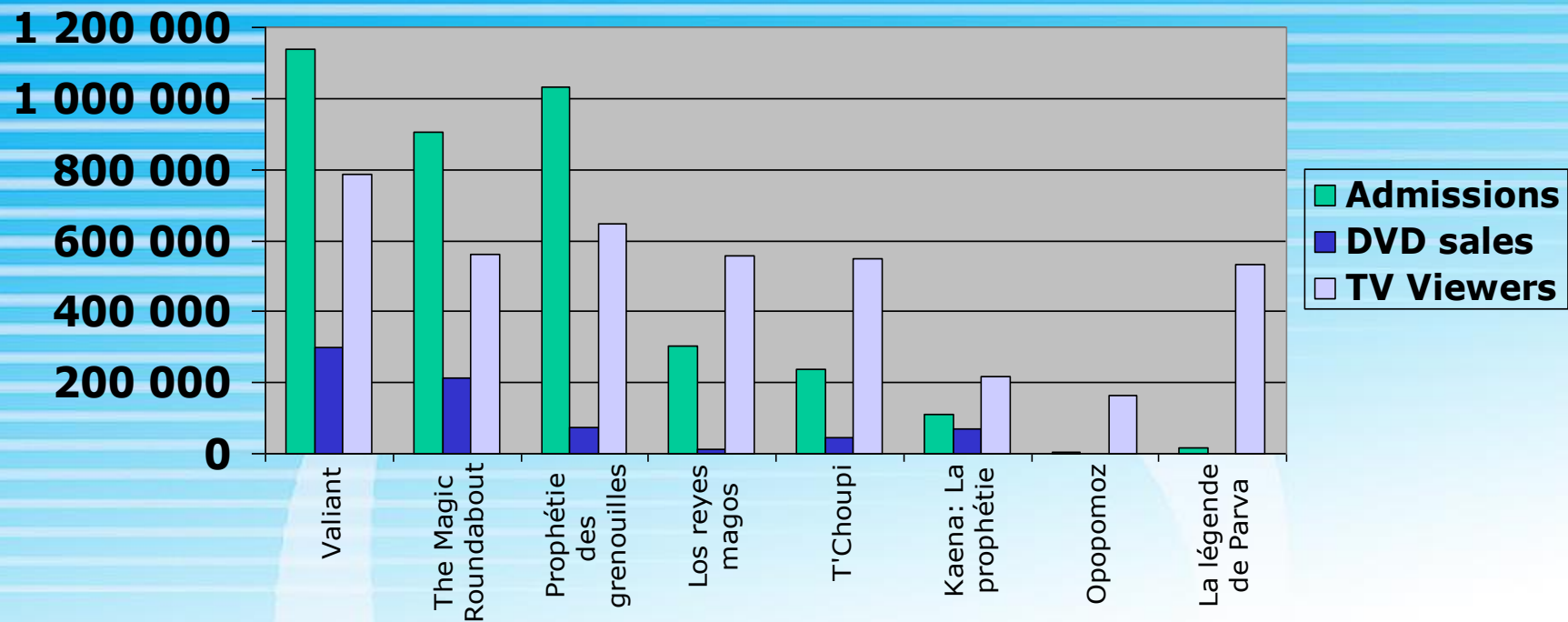


CUMULATIVE RATINGS OF SAMPLE ANIMATION FILMS BROADCAST BY FRENCH TV

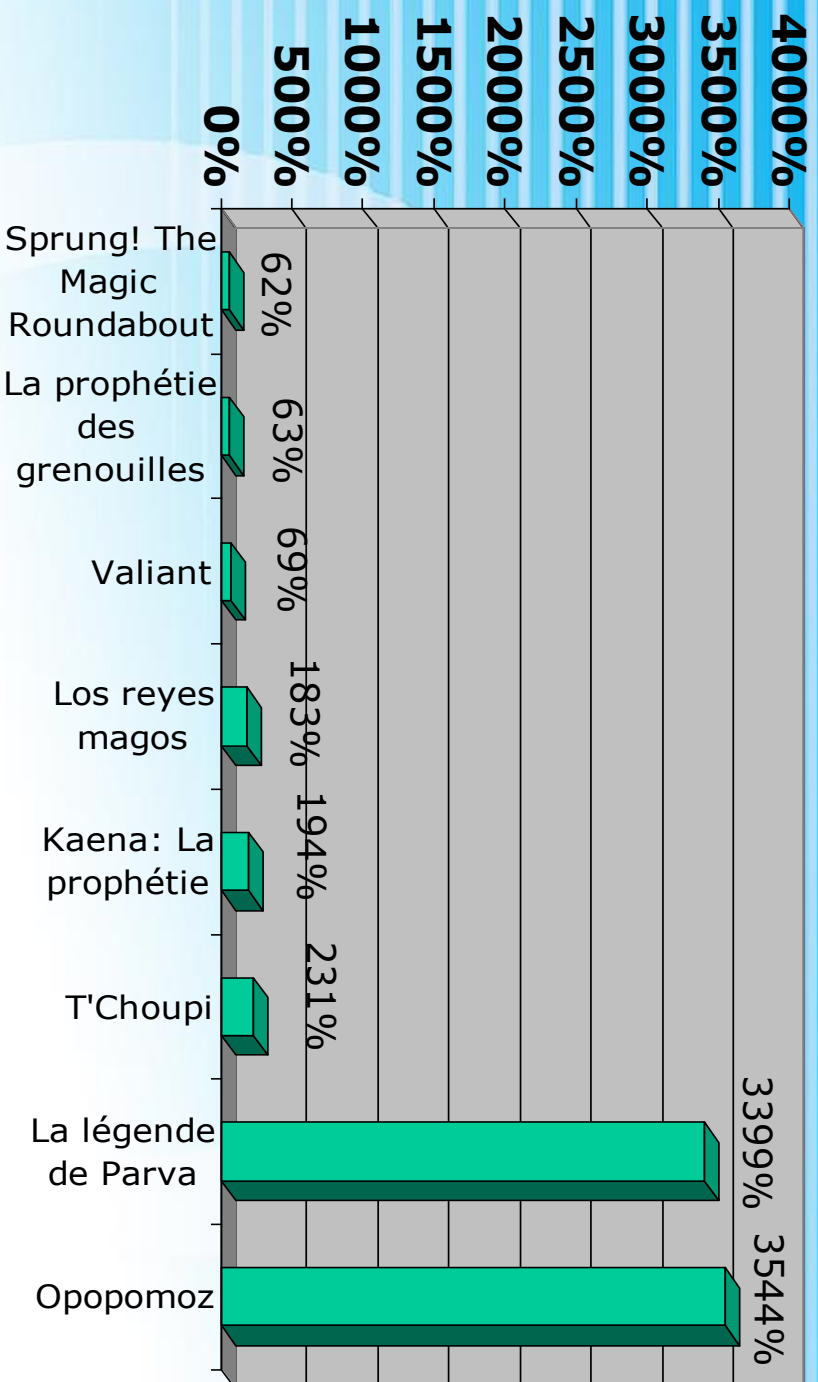
Thousand individuals



France – COMPARISON BETWEEN ADMISSIONS, DVD SALES AND TV VIEWERS

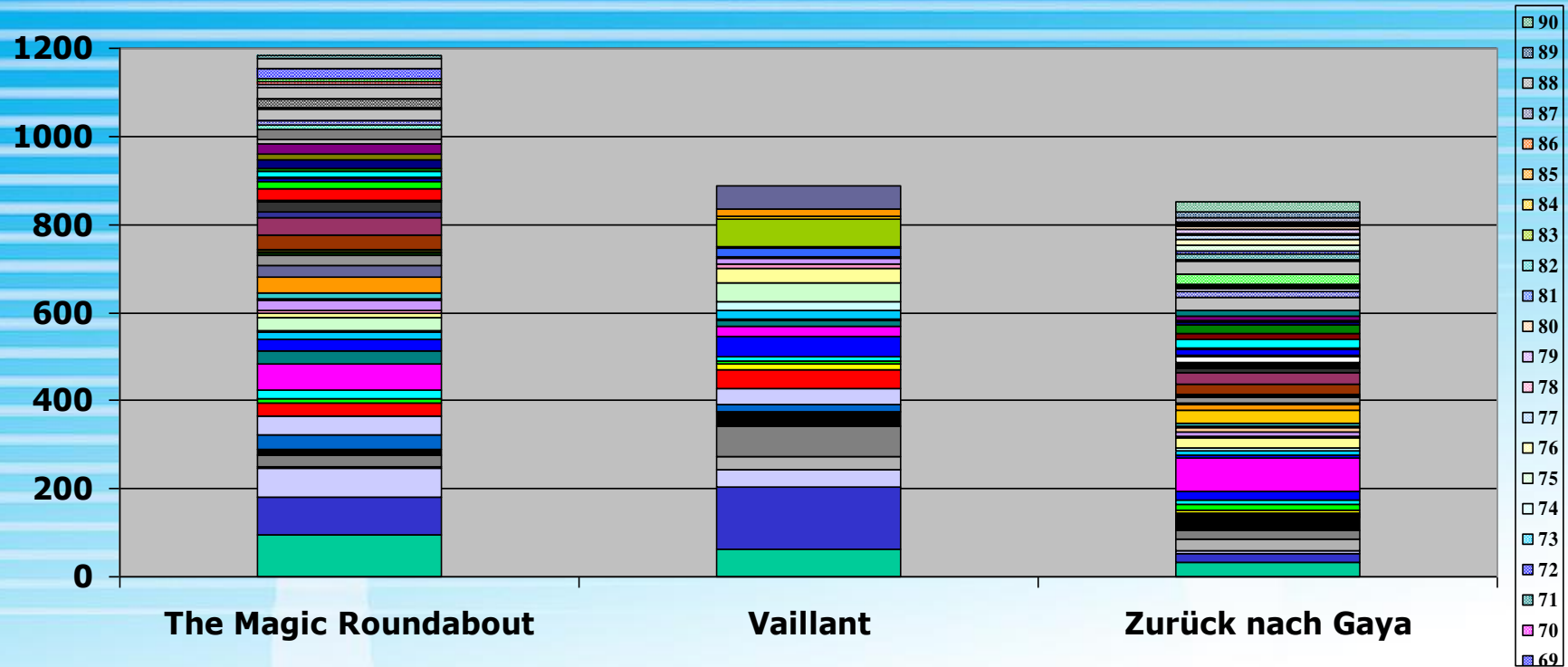


FRANCE - RATIO TV VIEWERS / ADMISSIONS (in %)



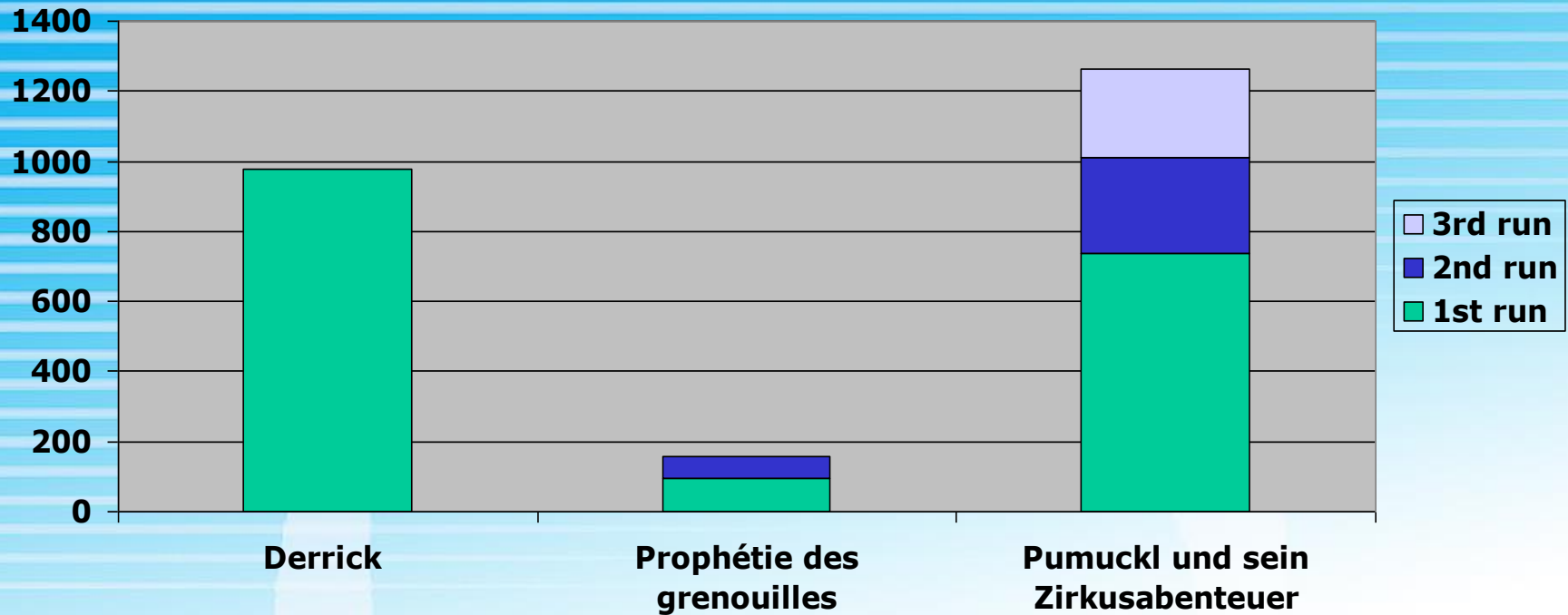
CUMULATIVE RATINGS OF SAMPLE ANIMATION FILMS BROADCAST BY BRITISH TV

Thousand individuals



CUMULATIVE RATINGS OF SAMPLE ANIMATION FILMS BROADCAST BY GERMAN TV

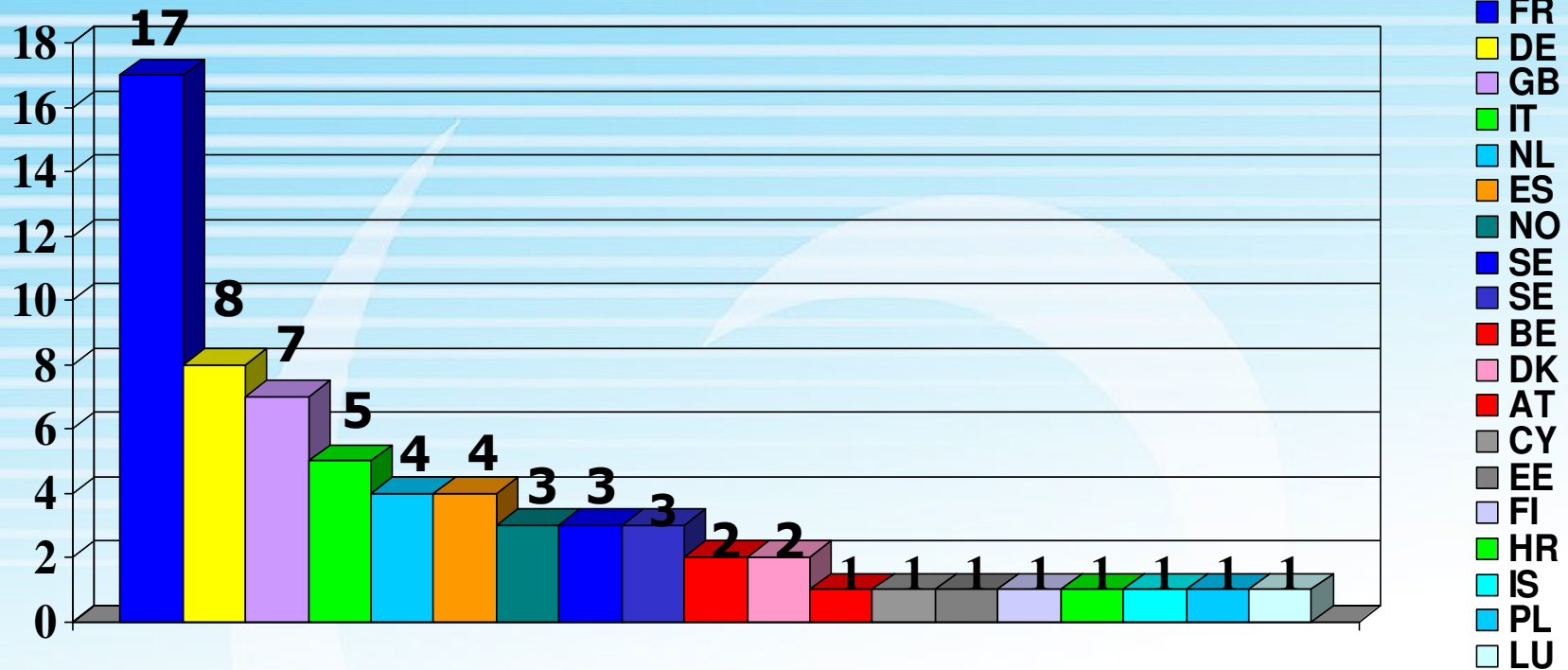
Thousand individuals



68 FILM AND TV VoD SERVICES OPERATIONAL IN EUROPE (July 2006)

- does not include VoD services for adult films

Source : European Audiovisual Observatory



OPERATORS OF FILM VoD SERVICES

- **Telecom operators:** T-Online, France Telecom, Belgacom, Telecom Italia, Telefonica
- **ISP:** Fastweb (IT), Arcor (DE), Absolut Medien (DE), Tiscali (IT, NL)
- **Cableoperators:** Telenet, ntl, Telewest, ONO, Casema
- **Broadcasters:** Canal+, TPS, TF1, RAI, RTLNederland, FT2, ARTE, M6, BBC, Premiere, ProSiebenSat1, Sky
- **Film group:** SF (Svensk Filmindustry)
- **Film & TV archives:** British Pathe, NFI, INA
- **Video publisher:** TF1 Video, Editions Montparnasse
- **Retailers:** Lovefilm, Virgin, Glowria
- **New companies, providers of content:** Cinezime, 4friends, Live Networks, Videonetwork...
- **Copyright agency:** SGAE
- **IT companies:** Apple's iTunes Music Stores

CONCLUSIONS (TO BE USED WITH CARE !)

- **MAJOR DEVELOPMENT OF EUROPEAN ANIMATION FEATURE FILMS**
- **SOME REMARKABLE SUCCESS IN THEATERS BUT EUROPEAN CIRCULATION STILL VERY FRAGMENTED AND NOT-SYSTEMATIC**
- **NO SYSTEMATIC CORRELATION BETWEEN ADMISSION SUCCESS, DVD SALES AND TV RATINGS**
- **FEW EXEMPLES OF DVD SUCCESS WITHOUT THEATRICAL SUCCESS**
- **DVD EXPORT RATIO BETTER THAN THEATRICAL EXPORT RATIOS FOR FRENCH AND GERMAN FILMS**
- **TV AS A POSSIBLE « SECOND CHANCE » FOR FILMS WITH LOW SUCCESS IN THEATERS**
- **VoD AS A NEW POTENTIAL MARKET FOR ANIMATION BUT PROBABLY SOME SPECIFICITIES DUE TO CHILDRENS' TARGET**