

THE NoJSe REPORT 2024:

NURTURING NORDIC CHILDREN'S FILM IN
A CHANGING MEDIA LANDSCAPE



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FOREWORD

The NoJSe network consists of five children's film festivals from the Nordic region in Europe and has existed since 2017. The five festivals are BUFF in Sweden, BFF in Norway, BUSTER in Denmark, OULU in Finland and The Icelandic film festival RIFF. The collaboration is strengthening the dissemination of Nordic films for young audiences in the Nordic Region of Europe, the filmfestivals and the involvement of local Filminstitutes and Public Service media, creating new and stronger meeting points for the children's media industries of the Nordic countries.

NoJSe works for:

- The Nordic European audiences to discover films for children and youth produced in the Nordic European region via streaming, festival screenings and film literacy initiatives
- The Industry of the Nordic European Regions to debate the status and future of children's media in the Nordics at designated NoJSe Network Industry events
- Knowledge to be shared between the festivals in the Network and the European Children and Youth Media Industry as a whole

This report builds on the work and thoughts of the first NoJSe Think Tank (2023). We extend our gratitude to all the Think Tank members for generously sharing their expertise and contributions. We also appreciate the valuable inputs provided by the observers of the Think Tank. A special acknowledgment goes to Johanna Koljonen at The Nostradamus Project, Göteborg Film Festival, for her diligent work in conducting the outcomes of the Think Tank into this report.

The NoJSe Network

BUFF Film Festival

BFF Kristiansand International Children's Film Festival

Oulu International Children's Film Festival

RIFF YOUTH Reykjavik International Film Festival

BUSTER Film Festival

INTRODUCTION

This report is a collaboration between the NoJSe Network of children's film festivals and Göteborg Film Festival's Nostradamus Project. It is intended to summarise and further reflect on a selection of the themes explored at a day-long Think Tank on children's film organised in conjunction with the 2023 BUSTER film festival in Copenhagen by the NoJSe Network.

For the work, I was given access to documentation of the Think Tank. The handful of highlighted quotes are of participants from that day. I had additional conversations with senior executives and experts at a national broadcaster, a national film fund, a regionally significant studio, and a local production company specialised in children's content.

Although their input was invaluable, they should not be held accountable for any errors or controversies in the following pages – those are mine!

Three topics stood out especially and are the focus of the chapters that follow:

- How a changing film culture affects both the professional industry and the audience's relationship to local language film.
- A gradually creeping – but alarming – disregard for children's film at public funds described by our experts, who increasingly find especially original stories impossible to greenlight.
- The shifting roles of global streamers in national production environments.

In the final section, we make the recommendation to create or review national and regional strategies for children's content to ensure limited resources are used effectively both in the interest of the young audiences themselves and as an investment in sustainable film cultures and film industries.

Many interesting discussions and ideas not covered in the following pages were raised in the think tank and the interviews, and will be taken onwards separately this year as input for a series of industry sessions and ultimately the next Think Tank at Buster this fall.

This work is also feeding into the 11th annual *Nostradamus Report* on the near future of the screen industries, which will be released at the Cannes Marché du Film in May. Like the previous ten, it will be available for download at goteborgfilmfestival.se/nostradamus.

Johanna Koljonen

Industry analyst

A CHANGING FILM CULTURE

Any conversation about children's film today is inevitably shaded by wider concerns: the future of theatrical exhibition, the audience's interest in local language content, and the funding and production realities of that content. It is also clear that societal, technological, and cultural changes are affecting the relative role and status of different kinds of audiovisual media. For those of us who got into this industry when feature-length fiction films were unquestionably at the top of the status pyramid, this feels uncomfortable and threatening.

We have only just gotten to terms with the golden age of TV drama, which demonstrated more than twenty years ago that not every story worth telling beautifully is necessarily suited for the feature format, or possible to fund for theatrical exhibition. Going forward, other video formats and distribution platforms will gain status, artistic quality, and cultural significance in the same way. Thinking of this as a problem is probably an overreaction. Shorter films as both art and entertainment pre-date features and engagement with quality film storytelling should count just as much regardless of where it occurs.

Children's film habits are typically viewed through a lens of concern. Teen and tween audiences are in particular focus because their media consumption differs so radically from that of previous generations and is unlikely ever to revert to the old patterns. It may really be the case that the distance between the industry and young audiences is particularly stark at this moment. If that is so, the situation should at least partly self-correct as more digital natives become professional film storytellers. (There are of course no guarantees that the traditional film industry or its dominant media formats will attract the best talent).

Smaller language areas grapple with the challenges of anglophone youth culture dominating online. Many industry voices connect this in their minds to the challenges of local theatrical film in reaching teen audiences, but that probably conflates two separate issues.

With fierce competition for attention, always having expensively produced Hollywood content at one's fingertips and in theatres will naturally make it harder for local language content to compete. At the same time, production value is certainly not the whole answer. Dominant online content such as social video works in all languages, and can look and feel quite inexpensive; instead, it is always relevant and is perceived as genuine – emotionally truthful.

If local films underperform with young audiences it is likely because the titles are relatively few. Inevitably, films are not always artistically successful, and those that are may not be relevant to the viewers' generation in subject matter, themes, or concerns.

Commissioners and filmmakers alike have often responded to lukewarm box office by just giving up on teenagers, which is completely counter-productive. Any piece of local content that connects creates more interest, and films for adults may have teens as a secondary audience, but the reverse is also true.

Another way of thinking about children's and youth film in the context of the industry's structural changes is that these kinds of films specifically may actually be best poised to meet the current challenges.

In places like the Nordics, where children's culture has a long history of being funded and respected, quality storytelling for children of all ages has always been experimental and adaptive. Children's film has always lived in a range of lengths and formats, even in the theatre, because smaller children obviously can't sit through hours of story. Because quality storytelling for kids both on television and online was made a priority when those media were young, it also has a long history on those platforms (in parallel, naturally, with a great deal of dross).

Most importantly, children's filmmakers have an unusually direct relationship with their audience, just because children are ruthless in their honesty: if a title does not grab them, they cannot focus. In this sense, even arthouse filmmaking for children has always been somewhat protected from the tension between artistic voice and the film literacy of the audience. Children's filmmakers, regardless of aesthetics, must always at least keep the need to be relevant, compelling, and comprehensible in mind.

Within the film industry, we have emotionally experienced the last decades' changes in film culture as something of a betrayal. We often speak about audience behaviours in terms of what the audience is doing wrong – how its priorities and taste are betraying local artists as a result of abstract societal forces, the general barbarity of the population, or cunning manipulation from streaming platforms.

It would be more constructive to think about this not as the audience's moral failing, but as a change in the role of the medium of film in the wider culture. Platforms, pricing, and availability have changed, but so have the presence of film criticism and coverage in the media we consume daily. It is not strange that the role of feature films as shared experiences and builders of identity has shifted a little to accommodate the ascendance of other interesting and powerful media.

Changing or protecting the role of feature film, local language cinema, or movie theatres long term cannot then be achieved through making that one film that would break through and turn the tide. It is a question of protecting and nurturing film culture – a complex process that in addition to films worthy of loving requires innovating and nurturing the whole ecosystem of physical spaces, film history, education, criticism, and public discourse.

Blaming young audiences for their lack of interest in certain types of content or experiences is absurd: they have never lived in any other film culture than this one. The good news is that of all audience groups they are the least set in their ways and among the most positive to film. Family films perform well in theatres, as do some genres for teen audiences. Young people are adept and interested in audiovisual storytelling and have created online spaces together to discuss and analyse the culture they consume.

Arguably then, many young people already live in a film culture where film is understood to be something to share, enjoy, be moved or challenged by, and to reflect on together. Just like it always has, film remains a way for young people, with their limited life experiences, to journey into other lives and worlds, into other kinds of minds and artistic languages, and to contextualise their own experiences in a way that makes their worlds richer and less scary.

A great deal of cultural work needs to happen for the film industry to re-engage grown-up audiences. We need relevant, life-changing, and deeply entertaining titles; exciting festivals; immersive and moving exhibition experiences; inspiring popular education about the history and language of film; the nurturing of film coverage in other media, and so on. All stakeholders in the wider film ecosystem will need to work together, and if they do, there is low-hanging fruit to be plucked – most obviously, re-engaging people who are or have considered themselves film fans with the theatrical experience.

That work must extend to the upcoming generations; it could even be argued that the only audience goal that truly matters for the industry long-term is making today's kids and youth fall in love with cinema. It may take a decade, by which they will be film-loving adults; the investment in such an audience pipeline can continue to pay off as long as there are children. It is strange, therefore, that precisely these audience groups, the films made for them, the people who make them, and projects inspiring kids to engage with cinema have such low status within the film industry.

The survival of local film industries is typically assumed to require a somewhat consistent production of original hits and local IP, as well as a wider ecosystem of diverse aesthetics and artistic voices to ensure that filmmaking and the stories told develop with the times, tools, and surrounding culture. This in turn is assumed to require that audiences have a relationship to movie theatres, access to excellent storytelling in their language, specifically to films describing environments, societies, or situations that are relevant and recognisable.

Filmmakers working with children and teens are delivering on all of these parameters, yet are not experiencing that their work is seen, valued, or supported. On the contrary, many professionals working with children's film across the Nordics today feel that their field is no longer a priority of funding or attention, often despite regulations explicitly saying it should be.

On their own merits, the status and visibility of children's film and children's film culture deserve and need to be higher. But even film industry stakeholders who are not particularly connected to or interested in children's cinema should urgently re-consider – because a vibrant film culture for children and young people is in the self-interest of every person working in our field.

FUNDING CHILDREN'S FILM

“It’s easy to complain about too little money, but in the Nordics, in terms of public funding, we are still very fortunate in a global view. All of us sitting here today have a real passion for telling stories to a young audience. And I think the young audience, even if they have TikTok and social media, will always need these stories. That’s what drives us.”

“Our scripts are seen as too arthouse for the distributors. And then you talk to [your national film institute, and to them] you are too commercial. You’re not arty enough. We have felt this on our bodies every single time with every single project. The first feature film I made got 8.8 million Norwegian kroner from the NFI. The second film, 2.5 million. The last film was zero. Yet the director [won the most awards] in the whole of Norway that year.”

“When it comes to films from established IP, you go into the market scheme of the film institute. But then you just get the famous books.”

Globally speaking, the availability of public funds for making children’s films in small language areas is a privilege. In the Nordic tradition, there has been broad political agreement on the inherent importance of children’s culture. Children are viewed as full citizens, which gives them as an audience the right to a share of any arts funding. At the same time, children’s culture in particular is often thought of in instrumental terms, as a shaper of values, democratic norms, local languages, and identity.

This is the historical basis for funding children’s culture as a separate category in the Nordics. A pedagogical tradition of respect for children’s rights and of the importance of imagination and play have also contributed to the relatively high status of children’s literature and theatre, to a media landscape permitting experimental and even daring kids’ programming especially on public service TV, and to funding for things like school screenings of feature films.

When the importance of children’s culture is taken for granted, it unfortunately also means its continuation is taken for granted. Participants in the think tank process from more than one Nordic country observed a tendency where children’s films have become slightly or significantly marginalised within the organisations, priorities, and staff skill sets of their national film funds.

This may have contributed to funding shifting from original films to commercial adaptations, and sometimes from the youngest audiences to projects for the oldest teens. Even within the film industry, let alone the wider culture, such changes are not much discussed. Without strong proponents for artistic children’s cinema both among the funders and in the national discourse, that kind of film is quietly under threat of extinction.

Family films performing well in theatres now tend almost exclusively to be based on existing IP. Expected to be hits, they are often funded as commercial films, through non-selective support schemes and similar structures. That this works is wonderful, but has created an atmosphere where even broad-appeal original films are increasingly viewed as risky niche projects. When they do get funded for production, they may still not have the muscle for a marketing campaign that would do their quality and audience potential justice.

All of the interviewees independently brought up that to compete with the international offering, total budgets for all children's films, including wide-appeal family films, would need to be allowed to grow beyond what it is currently possible to cobble together. As this kind of film performs well theatrically and supports the long-term strategic goals of local-language film, reallocating or growing available funds should not be politically controversial.

The specific circumstances of the very smallest nations amplify these challenges further. With populations in the hundreds or even just tens of thousands, public arts funding through the local tax base is entirely insufficient. Yet these are the areas whose languages and cultures are under the most threat, and where being represented on screen can be the most important from an identity perspective.

This problem is exacerbated even more for the indigenous populations of Greenland and Sápmi, as well as the speakers of Faroese and all other minority languages who are citizens of other Nordic states. Earmarked funding is sometimes available, but coherent long-term strategies on the regional, national, and EU levels would be necessary for building the necessary infrastructure and skill sets even in regions where a full-time film industry cannot be sustained.

"[Even where] not very many films for children are made, there is enormous opportunity. And we have seen it. Talking only about Iceland now, when there's a film that takes place in Icelandic environments, about them, about their problems, the young people cherish that project."

"Just getting started with Faroese content for children, I'm sort of optimistic about the opportunities (...) the doors are open because people are interested in content from the Faroe Islands, for example."

GLOBAL STREAMERS IN THE KIDS' AND YA MARKETPLACE

“If you’re working with Netflix, they’re not very interested in your regional culture... Especially us who come from micro-states, they’re not really interested in catering to this tiny Nordic [country].”

“Last year, Smuk [became] the best-selling youth film in Denmark for 15 years. After it reached 100,000 tickets in the cinemas, Netflix bought it for release. SF Film is totally happy about it, and it’s getting a sequel, of course!”

In recent years, the purchasing power of global streamers has strongly affected local film ecosystems. In today’s correcting marketplace, high-risk investment in local content is likely to decrease, while buying the rights to well-known IP and unexpected hits later in the game remains very attractive. Streamers are happy to pick up a finished film and brand it an “original”.

For the local parties, recouping investment and growing the potential international audience are obvious positives. Yet an inevitable consequence is that the risk and cost of development will be paid for by someone other than the streamers – typically public funding sources and the production companies themselves. In some contexts, the tradeoff might be considered fair, and the aspects of cultural export beneficial; in others, the placement of homegrown hit IP onto global platforms may be in conflict with wider audiovisual policy goals. One way or the other, national and local film strategies will need to actively evaluate and address this structural change. Support schemes and repayment rules may need tweaking to better support underlying policy goals.

Big local titles ending up on the global platforms also has one downstream effect that is less discussed. Algorithmic recommendations are geared towards maximising viewing hours, which especially for kids does not necessarily align with offering the greatest artistic experience (or the healthiest relationship to screens). Services such as Netflix and Disney+ do offer content of outstanding quality – but they are also loaded with enormous amounts of entertainment of very little value.

Tweens and teens will probably make their own viewing choices regardless, and it is perhaps inevitable that watching the same Disney masterpiece a hundred times as a child sometimes leads to later bingeing hundreds of episodes of awful schlock. This is where one hopes the young viewers live in a film culture allowing them to discern between the different kinds of relaxation and enjoyment offered by great film storytelling and audiovisual fast food. A very young child, on the other hand, will not be making those choices actively. On YouTube Kids, a huge platform for the youngest demographics, which is not selective beyond its age limits, the dynamic is even clearer: active viewing choices very rapidly lead to passive viewing choices. In some countries, YouTube Kids offers parental controls for setting up boundaries and participating in individual curation. In daily life, that time and effort may not always be possible for parents, offering a competitive opportunity for actively curated platforms such as broadcaster VOD in the local languages.

All that said, the long-term tendency is that global streamers are becoming a normalised part of the local production, funding, and distribution landscape. Where they previously acquired mostly full global rights, they are now increasingly selective about territories, and generally more positive towards local broadcaster partnerships, less exclusivity, and even theatrical windows. That trajectory is likely to continue. Should their reach of young adult audiences remain strong, it makes sense to consider them not a problem but a great partner for certain kinds of projects, and in growing audiences for local creatives, genres, talent, or IP. For children's content of a high quality that is relatively inexpensive to produce, YouTube and similar platforms offer the opportunity to reach the audience directly. This has of course been the basis of enormously successful IP's, such as *Cocomelon*, or for a Nordic example the pedagogical characters *Babblarna* – based on books for toddlers – whose YouTube channel has one billion views.

The ability of producers to take a more active part in shaping audience relationships and business outcomes, including monetising content in territories to which they retain the rights, is a positive development. But in the smallest language areas, where the number of children is numerically very limited, relying only on a platform such as YouTube has not been financially sustainable for professionals. New opportunities in generated video, synthetic translation, and synthetic voice work may change this dynamic going forward. At the same time, finding quality content on a platform like YouTube will become increasingly difficult as AI-prompted video booms. Prompted video is likely to surge first in short-format animation, making kids' content an obvious target. This will make curation of kids' content online and on streaming platforms even more valuable.

NATIONAL STRAGIES FOR CHILDREN'S CONTENT

Developing a vital and sustainable film culture, refocusing funding for children's content, and making relevant, innovative, and engaging movies in a sustainable professional sector – this is the work at hand. Pointing fingers or expecting to be saved is easy, but hardly productive.

This is the time for everyone in the film industry and the wider film cultural ecosystems to reflect on their individual agency, and not just in a professional or artistic capacity. We who make or care about films also act in the world as fans, ambassadors, parents, teachers, students, alums, informal influencers, and as members and volunteers of guilds, unions, associations, clubs, and festivals... If we want and need a vibrant film culture, a great place to start is right where we act in the world. Even so, the policy field requires addressing, and that must happen at a higher, collective level.

All countries and regions with public film funds have defined some kind of formal strategy describing how film supports specific, politically defined goals. Public service broadcasters are given their own set tasks, which often also include some partial responsibility for funding or at least screening local film and children's content. Audiovisual policy more broadly may also include both cultural and industrial policy goals affecting the film end of the audiovisual sector. In an ideal situation, all of these goals and their accompanying policies, strategies, and economic tools would be aligned. This is not always the case.

Even when they are, it would appear that the role of children's culture, children's content, and children's cinema in service of those goals is not considered very deeply. This is particularly curious as most European countries invest considerable efforts in supporting the survival of their local languages in all areas of society and life.

In countries where English is viewed as encroaching on young people's consumption of culture in their language, audiovisual policy should at the very least be coherent with language policy goals. The populist right has actually taken a backward interest in this issue, trying to limit funding to films in foreign or minority languages as a method of controlling whose stories and experiences get described. While distasteful, the strategy sometimes works thanks to its being based on more widely shared concerns about language and culture.

Public funding for arts and culture is increasingly under pressure politically, from cost inflation, and from competing needs in other areas of society, with direct impacts on the film industries. It is therefore important to evaluate whether money already invested is being spent systematically or in a scattershot manner, and to what degree we are living up to existing commitments. Starting with children's film has the benefit of cutting through a great deal of political disagreement, as most people have personal experience of its importance.

It is also a strategic investment in audience development and in film culture as a whole, of which film for young audiences is a holistic and indivisible part.

Where separate strategies for children's culture or specifically children's content already exist, they should be reviewed with an eye to the surrounding landscape of funding, distribution, and other kinds of support. Are children's content strategies and policies up-to-date in their understanding of how children consume and produce film and video today? Is it actually possible for professional filmmakers to make work that contributes towards those policy goals today? If some of those goals are purely artistic: is the content currently living up to that promise? If not, why? Might other audiovisual policies or priorities accidentally be undermining progress or productions in the children's film area?

Where children's content strategies do not exist, they should be created. What rights do our children have to content they can engage with and love – to access it, understand it, even make it? In what film landscape would making that content be financially and artistically sustainable in the context of our countries, language areas, and regions? How are we ensuring all children have the same opportunities? What would it take for that content to exist?