

# How do European films perform on TV in 2023?

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# Introduction and methodology

**This report provides an analysis of the share of European films in the number of film broadcasts and in film view time for a sample of European Union TV channels.**

## The data

- The data was provided by Glance, in the form of aggregated figures at country level. The data includes 85 866 film broadcasts in 2023 by 142 TV channels (54 public channels and 88 private channels) from 18 European Union countries: Austria, Belgium, Czechia, Denmark, Germany, Spain, Finland, France, Croatia, Hungary, Ireland, Italy, Netherlands, Poland, Portugal, Romania, Sweden, Slovenia.
- The TV channels in the sample are among the most successful in terms of audience. However, they represent a small proportion of the total number of TV channels active in Europe.
- The number of TV channels by country varies between 1 and 20. In some cases, the report provides details by country, but these results should be treated with caution.

## Scope of the report

- The report covers films, both theatrical and non-theatrical. The share of films by origin is analysed from two points of view:
  - Share in the total number of film broadcasts: Only broadcasts with a measured audience greater than 0 are included in the number of broadcasts.
  - Share in the total viewing time of films.
- Shares of film broadcasts and film time view are given for the following regions of origin:
  - European Union films, with a breakdown between national and non-national films.
  - Other European films.
  - US films.
  - Other regions films.

- The data is further broken down according to the following variables:
  - Time of broadcast (prime time vs. non-prime time). Prime time includes all film broadcasts starting between 7:30 pm and 10 pm, except for Spain (between 10 pm to 12 pm).
  - Film genre (animation, documentary, live-action fiction). Film genre is inferred from IMDb genre. Live-action fiction films are all films not tagged as animation or documentary, which means that their share may be overestimated.
  - Production year.
  - TV channel status (private or public).
  - Theatrical films or non-theatrical films. Theatrical films are defined as films released in cinemas in at least one European countries. Films are classified as theatrical if they appear in the Observatory's LUMIERE database. As LUMIERE only includes films released since 1996, only films produced in 1996 or after are tagged as theatrical or non-theatrical.
- This report does aim to measure the quotas foreseen in the AVMS directive. In particular, this report only takes into account broadcasts with a measured audience greater than 0.

Please quote this report as “How do European films perform on TV?”, European Audiovisual Observatory.

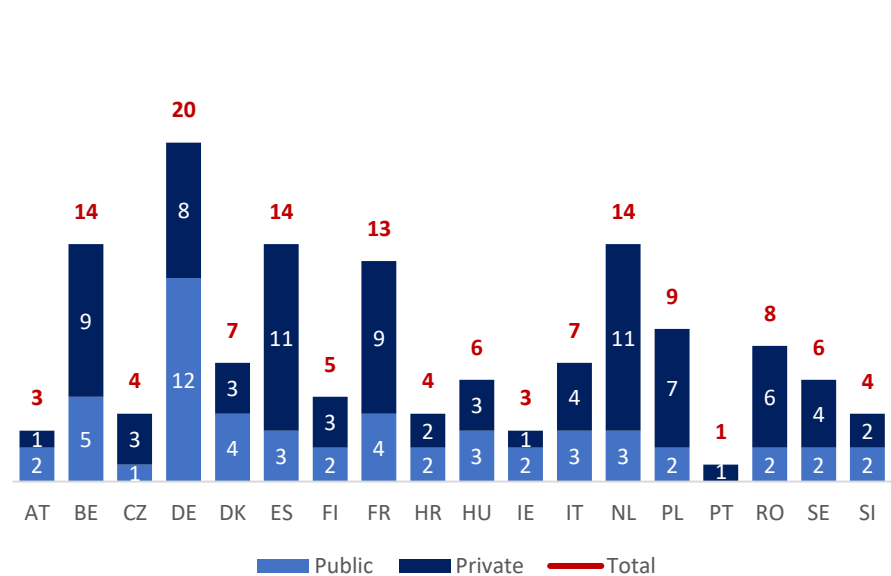
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# The sample

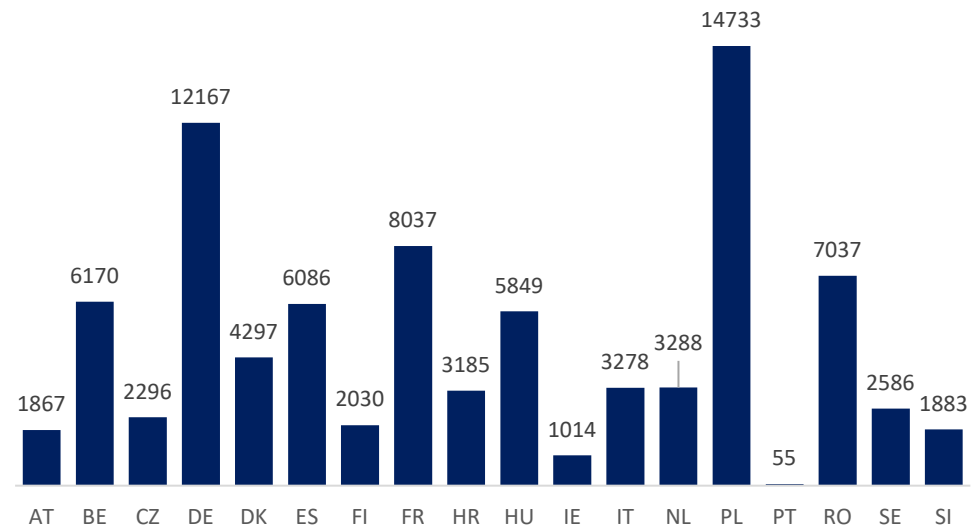
The sample includes 85 866 film broadcasts in 2023 by 142 TV channels (54 public channels and 88 private channels) from 18 EU countries.

Number of TV channels in the sample by country (2023)



Source: European Audiovisual Observatory analysis of Glance data

Number of film broadcasts in the sample by country (2023)



Source: European Audiovisual Observatory analysis of Glance data

## Key findings

## Importance of films in TV viewing time

On average, film viewing time accounts for 13% of television viewing time. This proportion varies among European Union countries, from 7% to 23%.

## European Union share of film viewing time

European Union films account for 33% of film broadcasts<sup>1</sup> on television and 41% of film viewing time. European Union films therefore tend to overperform in audience comparing with their share in the supply of films.

However, 30% of all film broadcasts are non-theatrical films<sup>2</sup>. Non-theatrical films are TV films commissioned by the broadcasters, mainly European, and direct-to-TV films, i.e., films, mostly non-European, not released in Europe. The share of non-theatrical films is particularly high for documentaries; non-theatrical films tend to be more recent than theatrical films.

When considering only theatrical films, European Union films account for only 26% of film viewing time.

## National and non-national films

Among European Union films, national films account for the majority of broadcasts, and an even greater majority of viewing time. In other words, non-national films from European Union are comparatively less successful than national films.

<sup>1</sup> Only films with a measured audience higher than 0 are accounted for.

<sup>2</sup> Theatrical films: released in at least one European country. Only films produced in 1996 or later are considered.



### Variations among countries

Bearing in mind the limitations of the sample<sup>1</sup>, the share of European Union films in film view time varies from 16% to 74% between countries. In general, countries with a high share of national films achieve a high share of European films' viewing time.

Some countries have a particularly high proportion of viewing time for non-national films because they benefit from an easy access to films from a neighbouring country that speak the same language (e.g. Austria/Germany; Belgium/France).

### Weight of UK films

Other European films mainly include United Kingdom films. They account for 6% of film broadcasts and 5% of film viewing time, with a much higher share in Sweden and Finland, and especially in Ireland, for obvious linguistic reasons.

### Comparison with cinema and SVOD

Even if the samples differ between studies, the share of European Union films in film viewing time on TV contrasts in several respects with what the Observatory observed in its LUMIERE database and its reports on SVOD usage: when considering only theatrical films, European Union films perform better in cinemas than on TV or on SVOD; the share of non-national EU films among EU films is significantly higher on SVOD than in cinemas or on TV, due to the dominance of the leading SVOD pan-European streaming services; the share of other European films (i.e. mainly UK films) among European films is significantly higher on SVOD than on TV and in cinemas.

<sup>1</sup> The number of TV channels per country in the sample varies between 3 and 20.

## Prime time vs. non-prime time

Prime time accounts for 25% of film broadcasts but, logically, 47% of film viewing time. Comparatively speaking, European Union films are more successful in prime time, where their share of viewing time is higher than their share of broadcasts.

## Film genres

Including both theatrical and non-theatrical films, fiction films account for over 90% of both film broadcasts and film viewing time. European Union documentary films are particularly successful, but European animation films are, on the one hand, underrepresented among animation films of all origins and, on the other hand, their share of viewing time is lower than their share of broadcasts.

## Year of production

Films aged 5 years or less account for an average of 32% of film viewing time, with a much higher share in France due to the strong involvement of broadcasters in the financing of films. Documentary films are more recent than other film genres, due in particular to the high share of made-for-TV documentaries.

Whether theatrical or non-theatrical, recent European Union films (aged 5 years or less) are comparatively much more present (i.e. share of broadcasts) and successful (i.e. share of viewing time) than European Union catalogue films (aged 6 years or more).

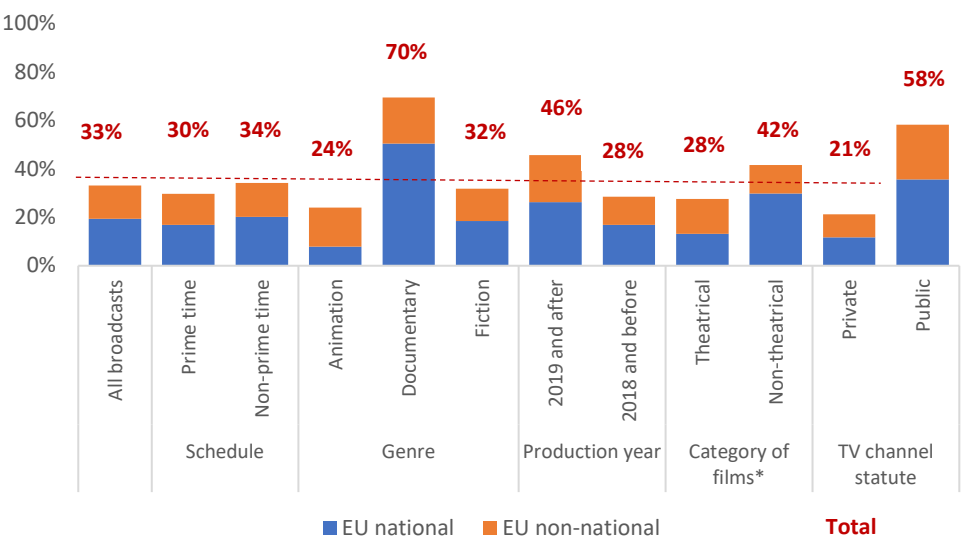
## Public and private TV channels

Public channels proportionally invest in and broadcast more TV movies than private channels, and these TV movies perform comparably better than theatrical films. Public channels devote a much higher share of film broadcasts to European Union films, which account for a much higher proportion of film viewing time.

# Summary of key figures: EU films

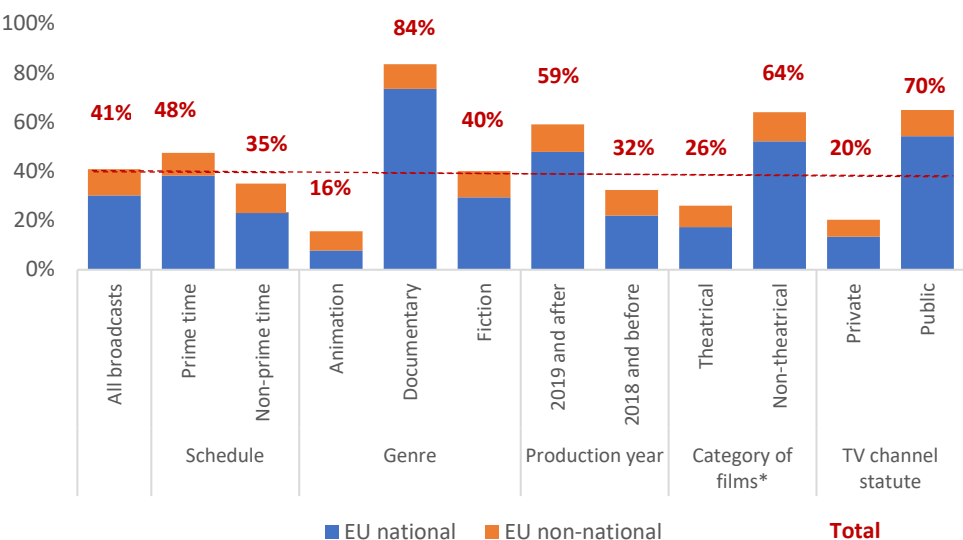
The two graphs below provide the share of European films in film broadcasts and in film viewing time, broken down according to the main variables used in this report: broadcasting schedule (prime time vs. non-prime time; film genre; production year; theatrical vs. non-theatrical films; TV channel status).

Share of EU films in **film broadcasts** by schedule, genre, production year, category of films\* and TV channel status (2023)



\*Theatrical vs. non-theatrical: only films produced in 1996 or later.

Share of EU films in **film view time** by schedule, genre, production year, category of films\* and TV channel status (2023)

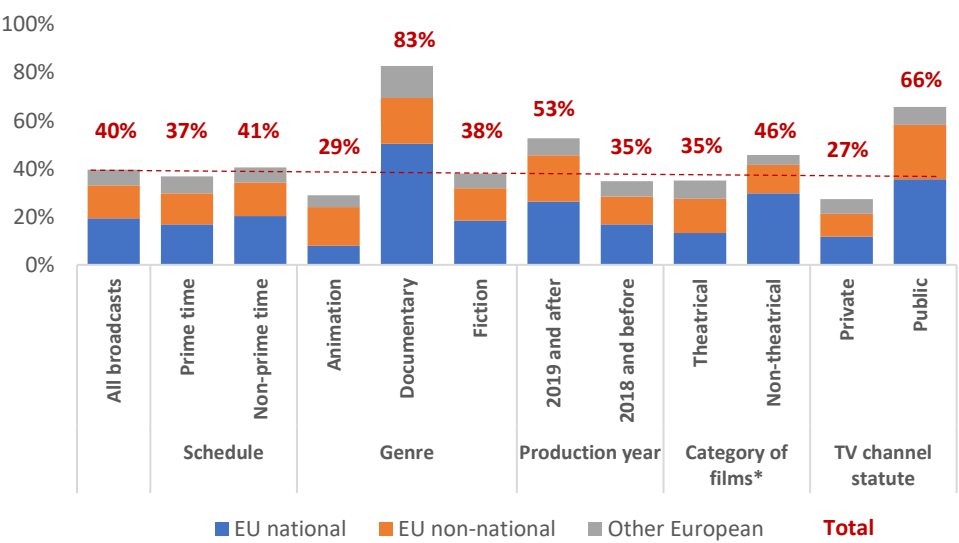


\*Theatrical vs. non-theatrical: only films produced in 1996 or later.

# Summary of key figures: European films

The two graphs below provide the share of European films in film broadcasts and in film viewing time, broken down according to the main variables used in this report: broadcasting schedule (prime time vs. non-prime time; film genre; production year; theatrical vs. non-theatrical films; TV channel status).

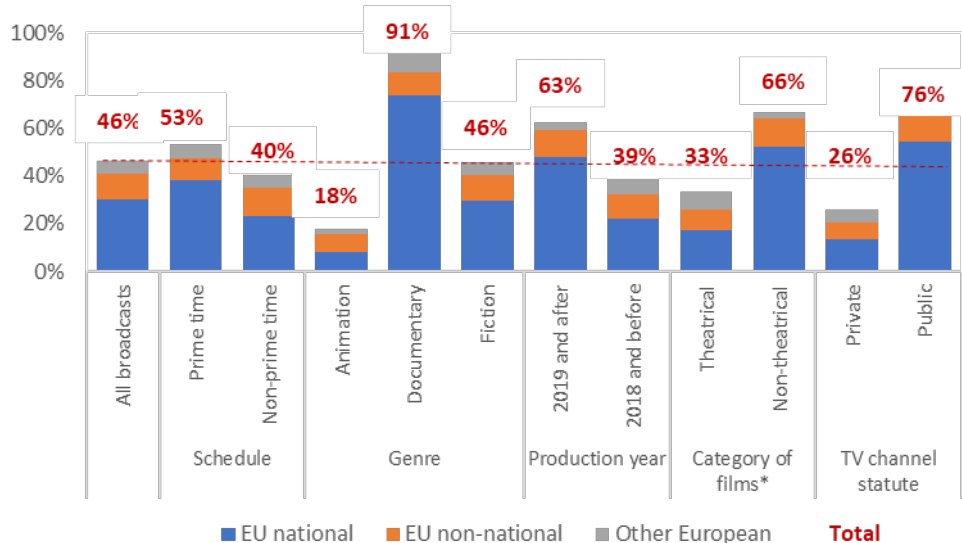
Share of European films in **film broadcasts** by schedule, genre, production year, category of films\* and TV channel status (2023)



\*Theatrical vs. non-theatrical: only films produced in 1996 or later.

Source: European Audiovisual Observatory analysis of Glance data

Share of European films in **film view time** by schedule, genre, production year, category of films\* and TV channel status (2023)



\*Theatrical vs. non-theatrical: only films produced in 1996 or later.

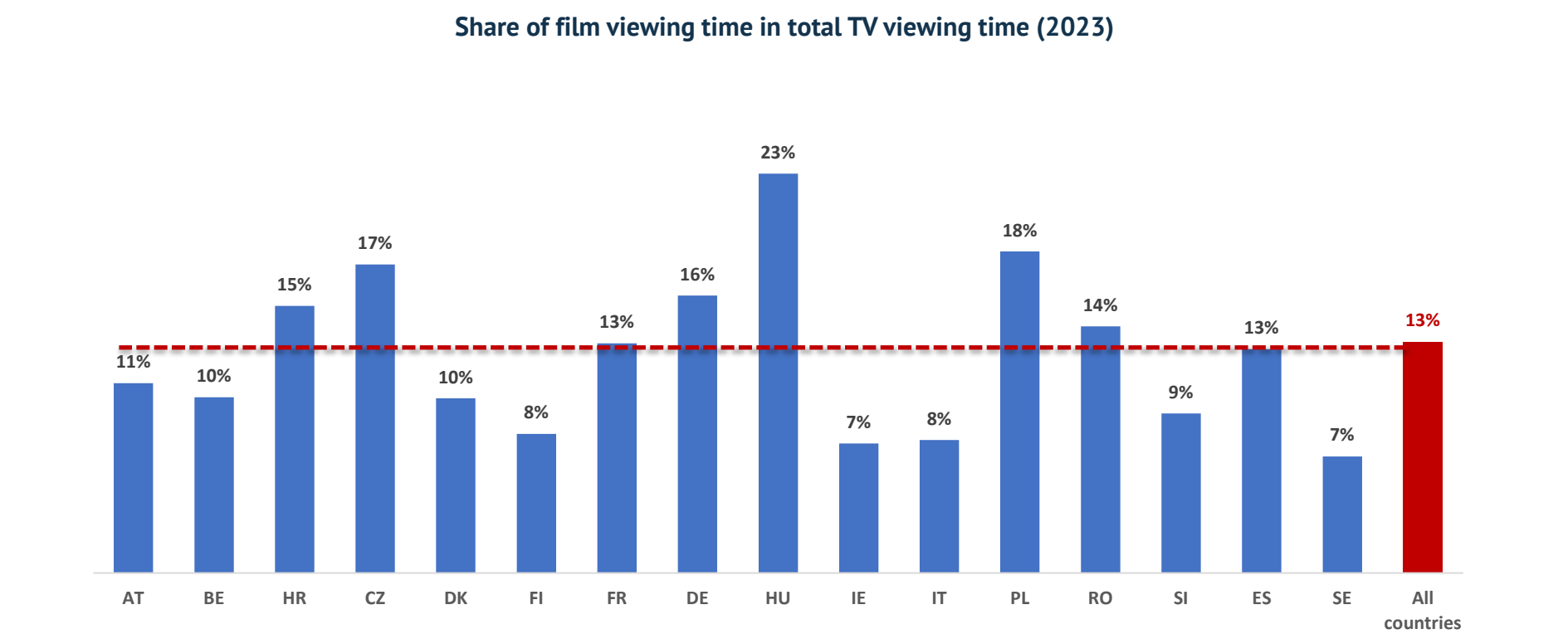
Source: European Audiovisual Observatory analysis of Glance data

## Importance of films in TV viewing time

# Importance of films in TV viewing time: films account for 13% of TV viewing time

On average, film viewing time accounts for 13% of television viewing time.

The share of films in the total television viewing time varies between countries, from 7% to 23%.



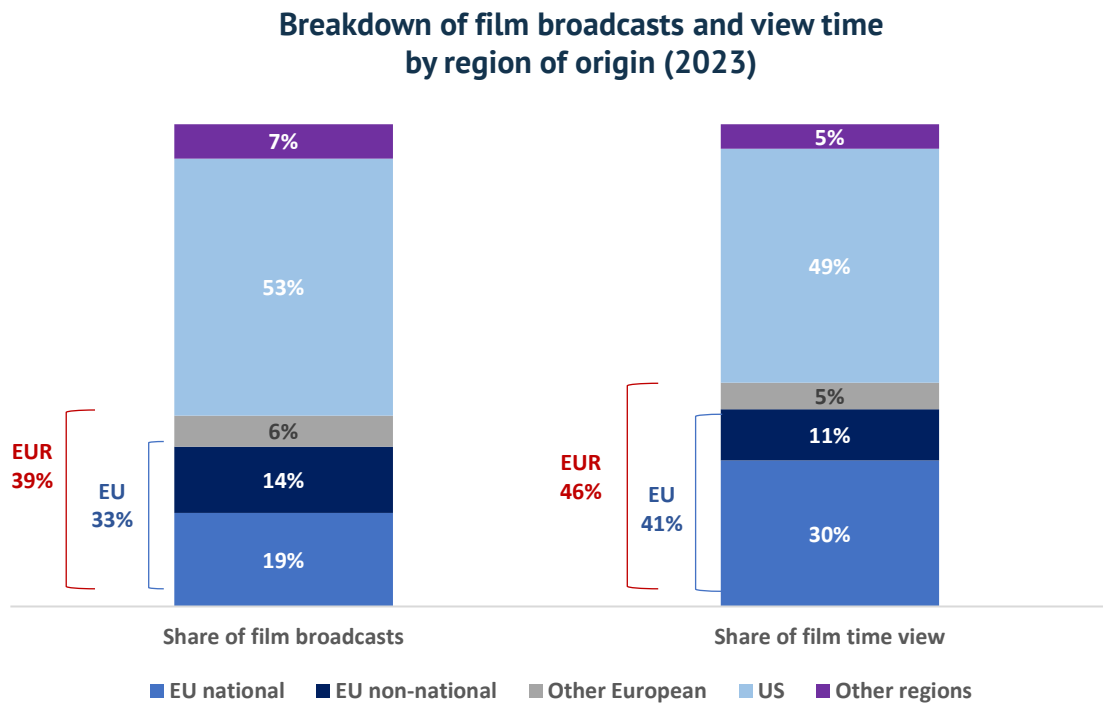
Source: European Audiovisual Observatory analysis of Glance data

## Origin of films

# Origin of films: European non-national films less viewed than national films

European Union films get a higher share of film viewing time (41%) than their share of film broadcasts(33%). However, among European Union films, non-national films are proportionally less watched than broadcast.

Other European films (i.e. mainly UK films) account for 5% of film viewing time.



Source: European Audiovisual Observatory analysis of Glance data

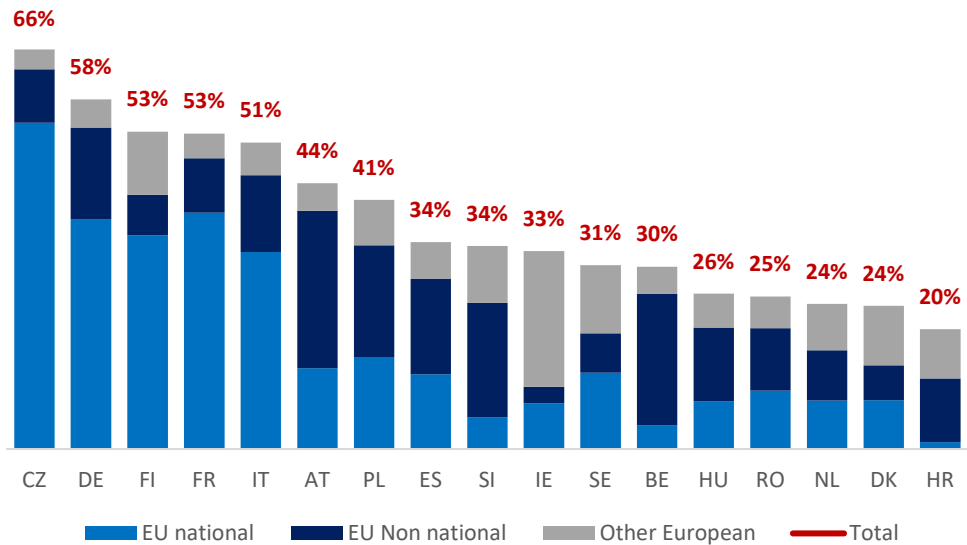


# Origin of films: very strong variations between EU countries

In terms of number of broadcasts, countries with a high proportion of national films reach a high level of European Union films.

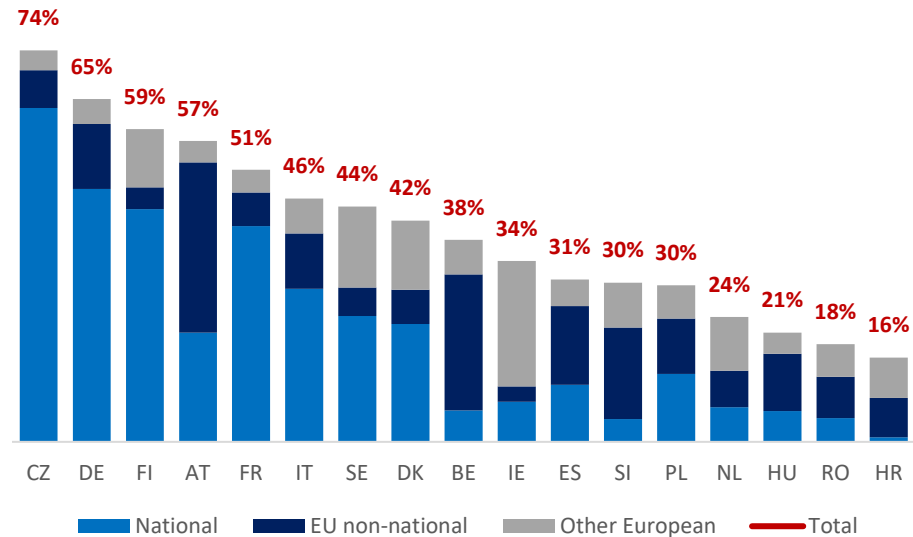
Other interesting cases include Spain, with a rather low proportion of European films for a country with a high production output, which may be due to its appetite for Latin American and Spanish language US films; countries with a high proportion of non-national European films, such as Ireland, which draws heavily on UK films; Austria and Belgium, which benefit from German and from French and Dutch films, respectively.

Share of European films in **film broadcasts** by country (2023)



Source: European Audiovisual Observatory analysis of Glance data

Share of European films in **film view time** by country (2023)

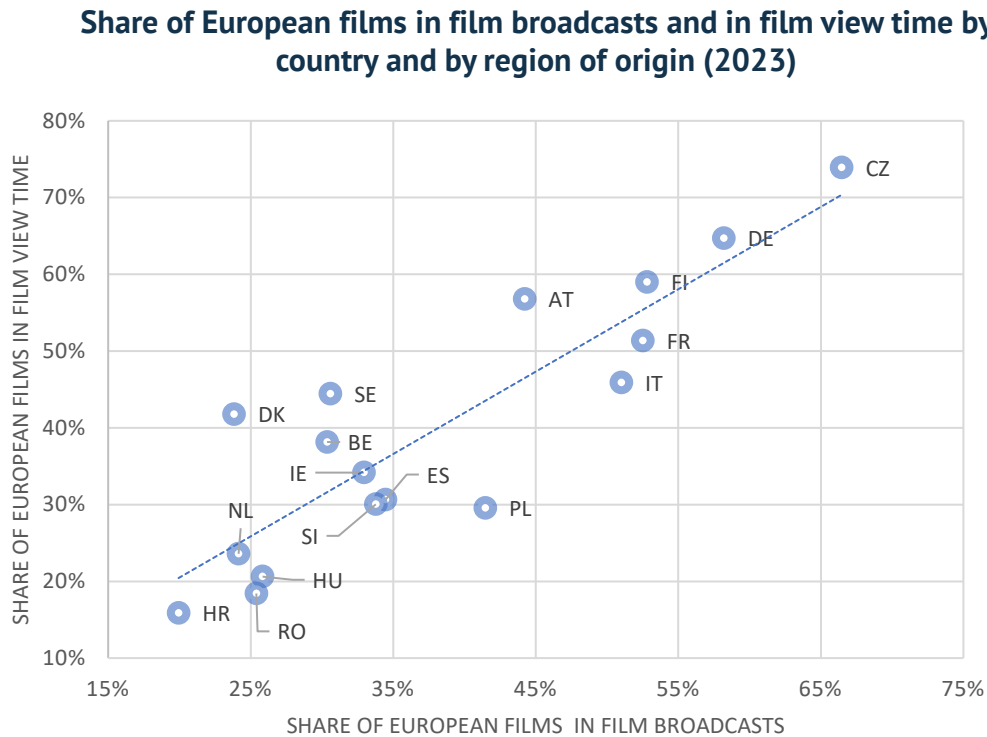


Source: European Audiovisual Observatory analysis of Glance data

# Origin of films: usage broadly correlated with supply

The shares of European films in film broadcasts and in film view time appear to be broadly correlated.

However, there are some outliers: countries where European films are more successful than their share of broadcasts (e.g. Denmark, Sweden); countries where European films are proportionally less successful than their share of broadcasts (e.g. Romania, Poland, Italy).



Source: European Audiovisual Observatory analysis of Glance data

# Origin of films: comparison with cinemas and SVOD

The viewing time of European Union and European films on TV can be put into perspective with their success in cinemas and on SVOD. When considering only theatrical films, European Union films perform better in cinemas than on TV or on SVOD.

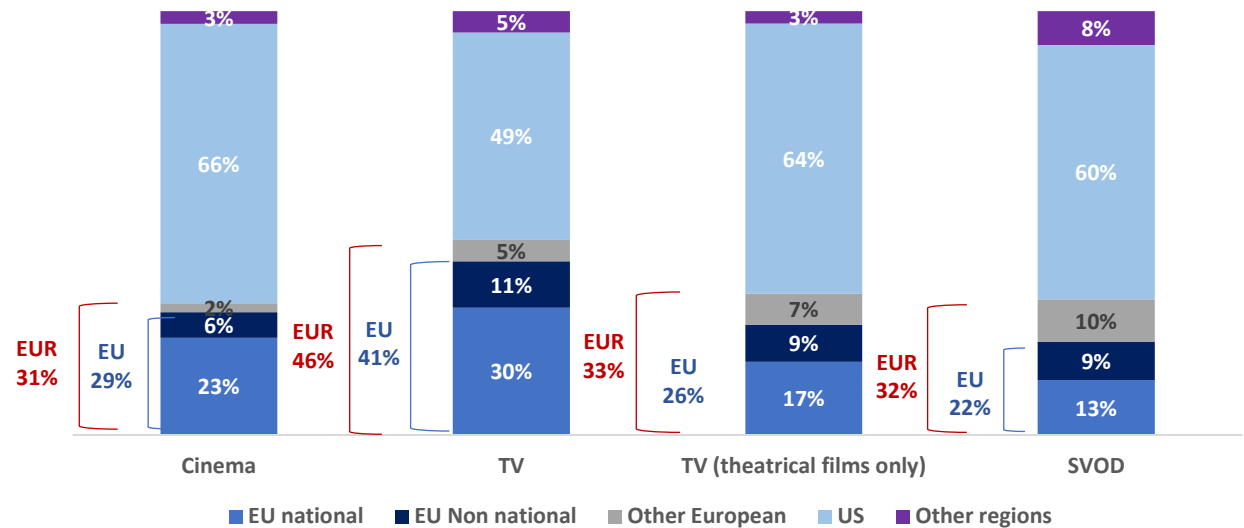
Comparatively, the share of non-national EU films among EU films is significantly higher on SVOD than in cinemas or on TV, due to the dominance of the leading SVOD pan-European streaming services.

Comparatively , the share of other European films (i.e. mainly UK films) among European films is significantly higher on SVOD than on TV and in cinemas.



*The samples differ between the 3 release windows. The results should be interpreted with caution.*

Share of European films in cinema admissions, TV and SVOD view time by region of origin (2023)



Sample:	EU27 / 2023 prov. admissions	18 EU27 countries / 2023 view time	9 EU27 countries / 2023 view time
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Source: European Audiovisual Observatory analysis of LUMIERE, Glance and Goldmedia data

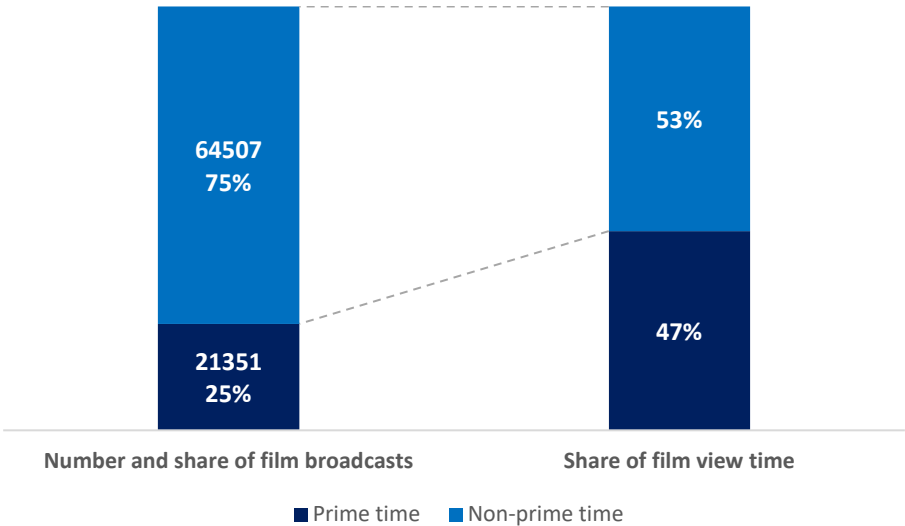
## **Breaking down the data: prime time vs. non-prime time**

# Prime time vs. non-prime time: prime time accounts for 47% of film viewing

Prime time accounts for 25% of film broadcasts but, logically, 47% of film viewing time.

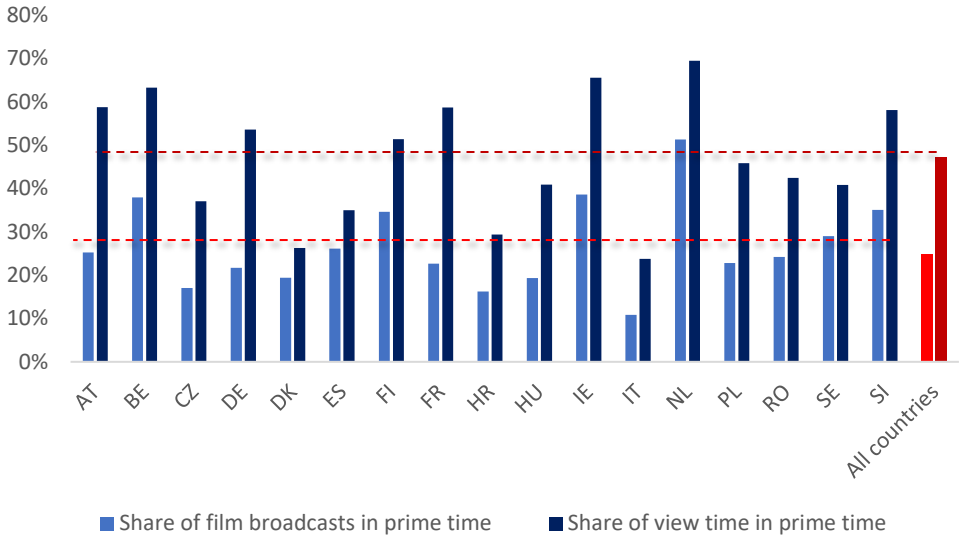
Some countries (Netherlands, Ireland, Belgium, Slovenia, Finland) favour more prime time for film broadcasts.

Breakdown of film broadcasts and film view time: prime time vs. non-prime time (2023)



Source: European Audiovisual Observatory analysis of Glance data

Share of film broadcasts and film view time in prime time by country (2023)

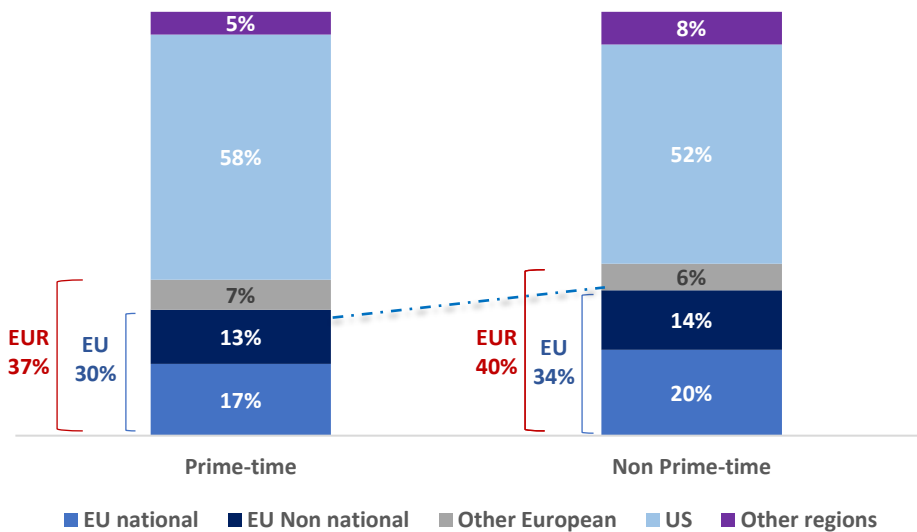


Source: European Audiovisual Observatory analysis of Glance data

# Prime time vs. non-prime time: EU films more successful in prime time

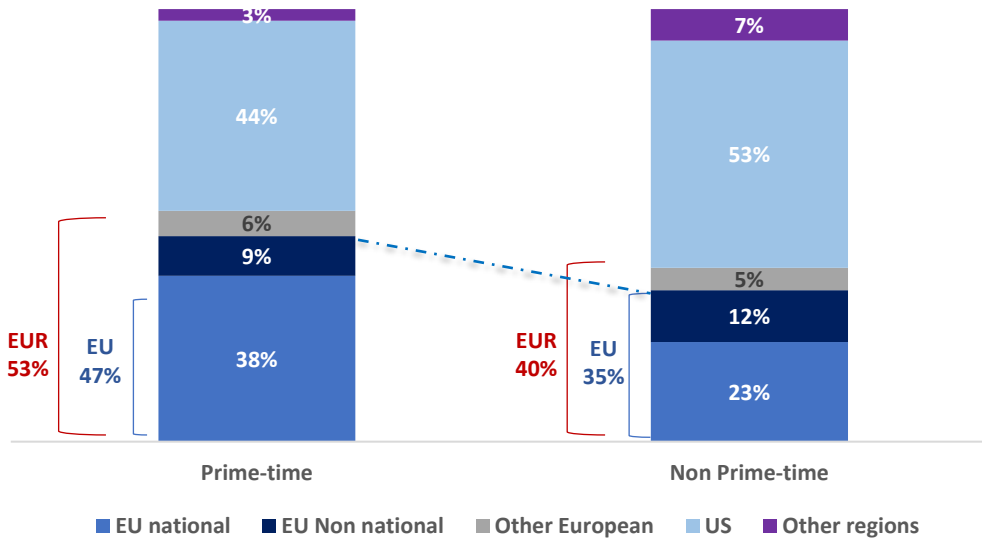
Although European Union films account for lower proportion of film broadcasts in prime time than in non-prime time, their share of view time is higher, indicating that they are relatively more successful than films from other origins.

Breakdown of **film broadcasts** by region of origin: prime time vs. non-prime time (2023)



Source: European Audiovisual Observatory analysis of Glance data

Breakdown of **film view time** by region of origin: prime time vs. non-prime time (2023)



Source: European Audiovisual Observatory analysis of Glance data

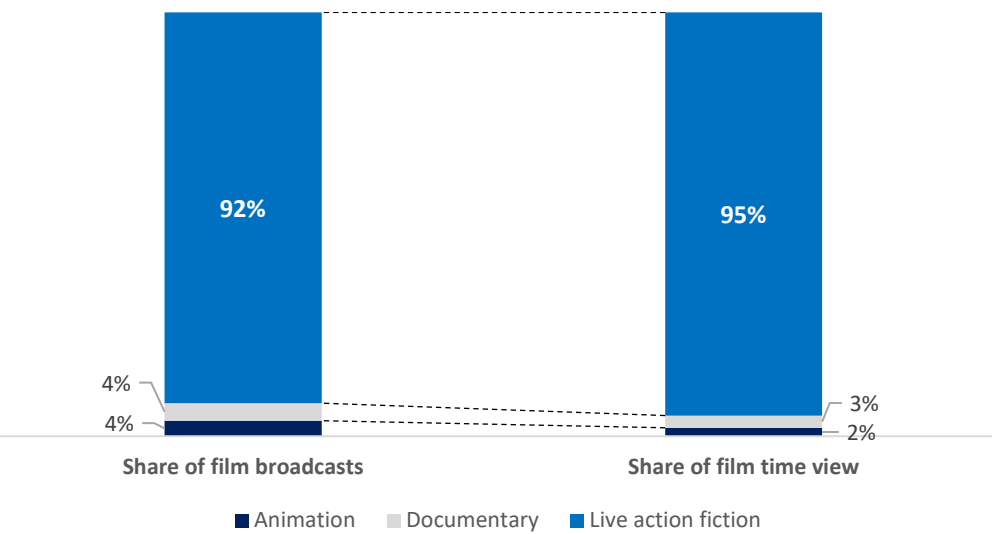
## Breaking down the data: film genre

# Film genre: mostly live action fiction films

Live action films account for more than 90% of film broadcasts and view time.

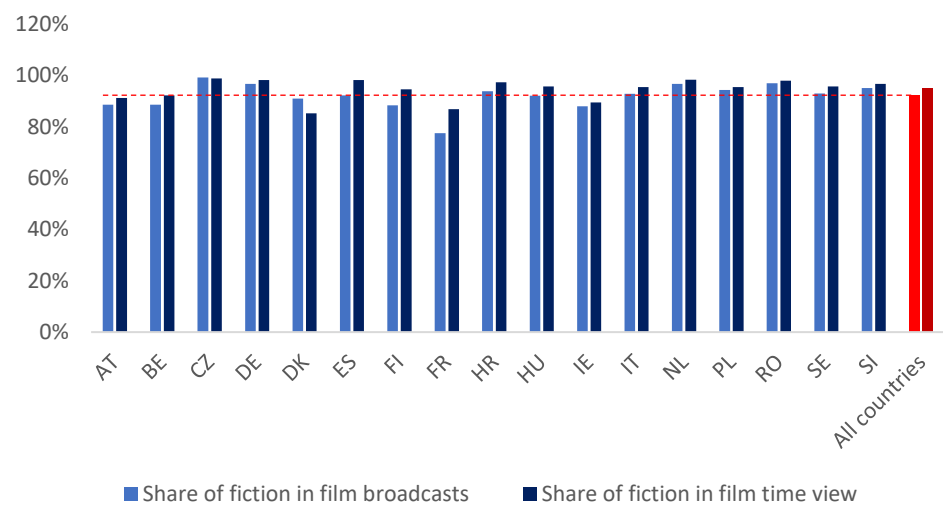
The weight of live action fiction is relatively homogeneous across the EU countries, with a slightly more diverse offer in France.

Breakdown of film broadcasts and film view time by film genre (2023)



Source: European Audiovisual Observatory analysis of Glance data

Share of live action fiction films in film broadcasts and film view time by country (2023)



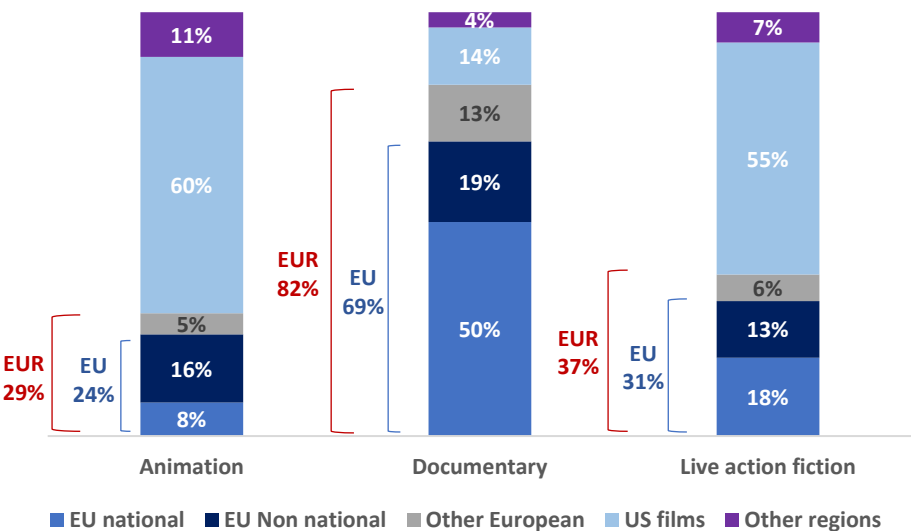
Source: European Audiovisual Observatory analysis of Glance data



# Film genre: strong share for EU documentary films

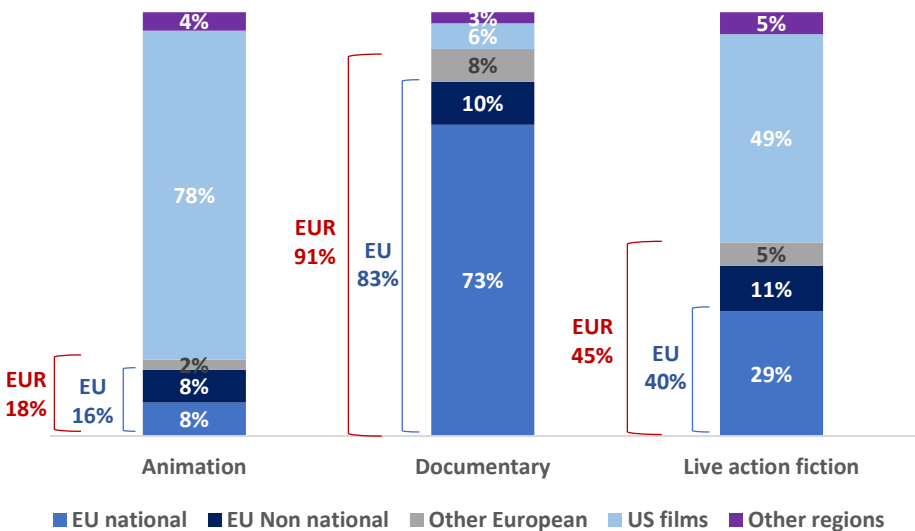
European Union documentary films reach a much higher proportion of film broadcasts and film view time than European Union live action fiction and animation films.

Breakdown of **film broadcasts** by region of origin and by genre (2023)



Source: European Audiovisual Observatory analysis of Glance data

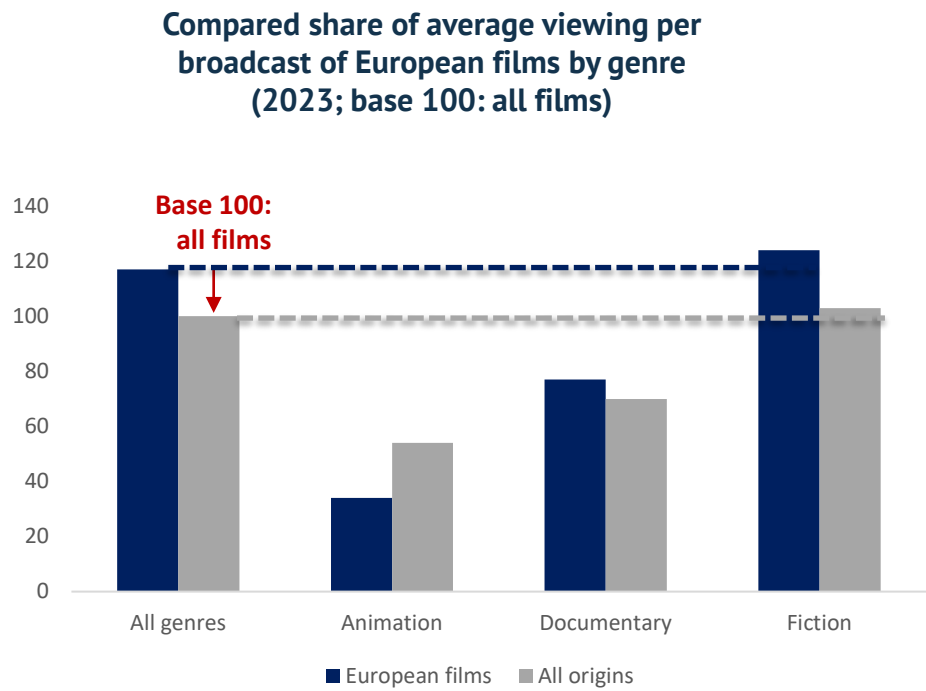
Breakdown of **film view time** by region of origin and by genre (2023)



Source: European Audiovisual Observatory analysis of Glance data

# Film genre: European animation films also weaker on a per broadcast basis

The low share of European Union animation films is not only due to the low number of broadcasts. European Union animation films also underperform on a per broadcast basis.



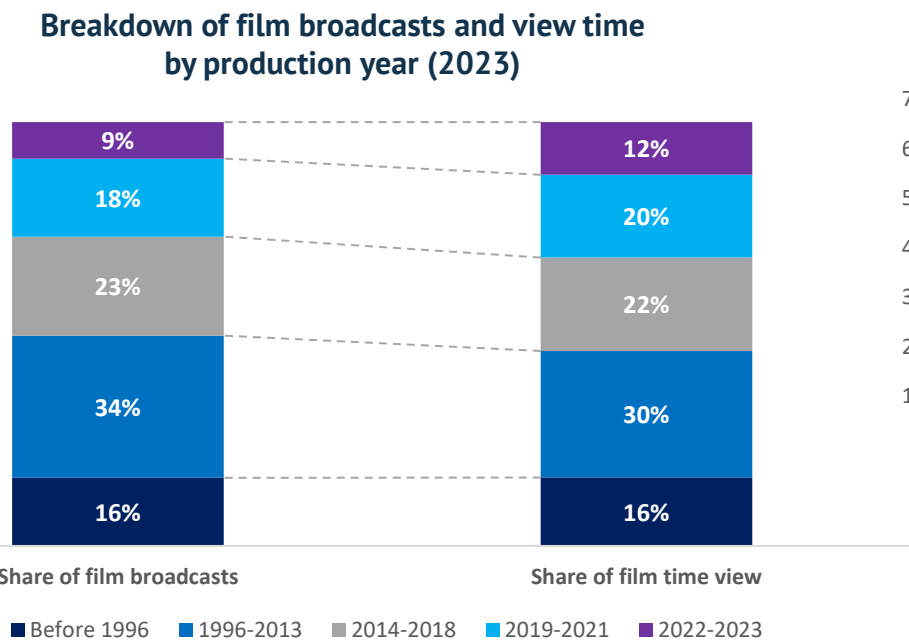
Source: European Audiovisual Observatory analysis of Glance data

## Breaking down the data: production year

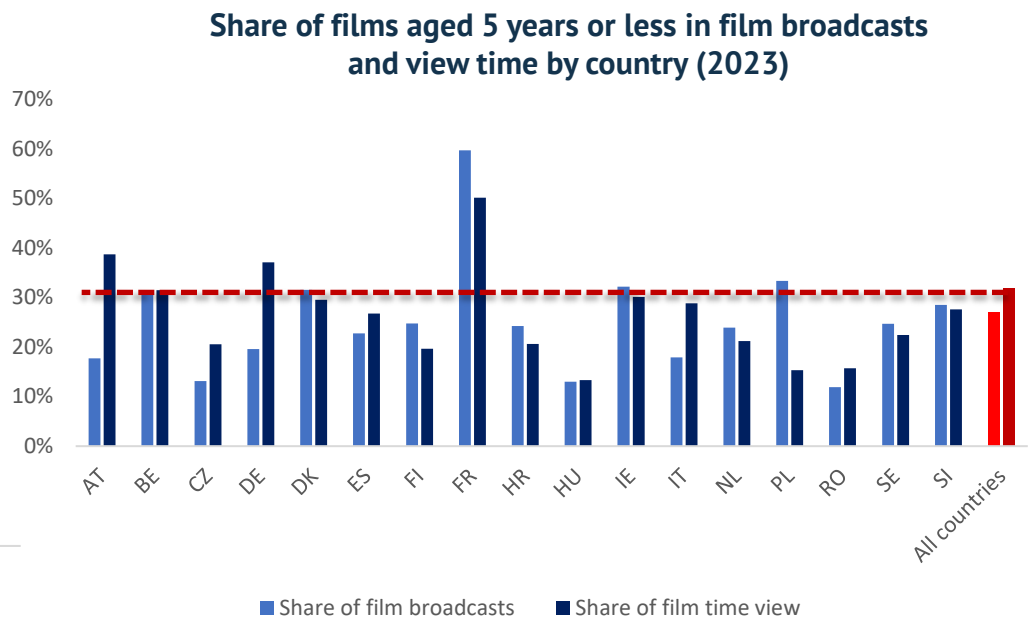
# Production year: much more recent films in France

Logically, films aged 5 years or less account for a higher proportion of view time (32%) than their share of broadcasts (27%).

France stands out for its share of recent films, due to the strong involvement of broadcasters in the financing of films.



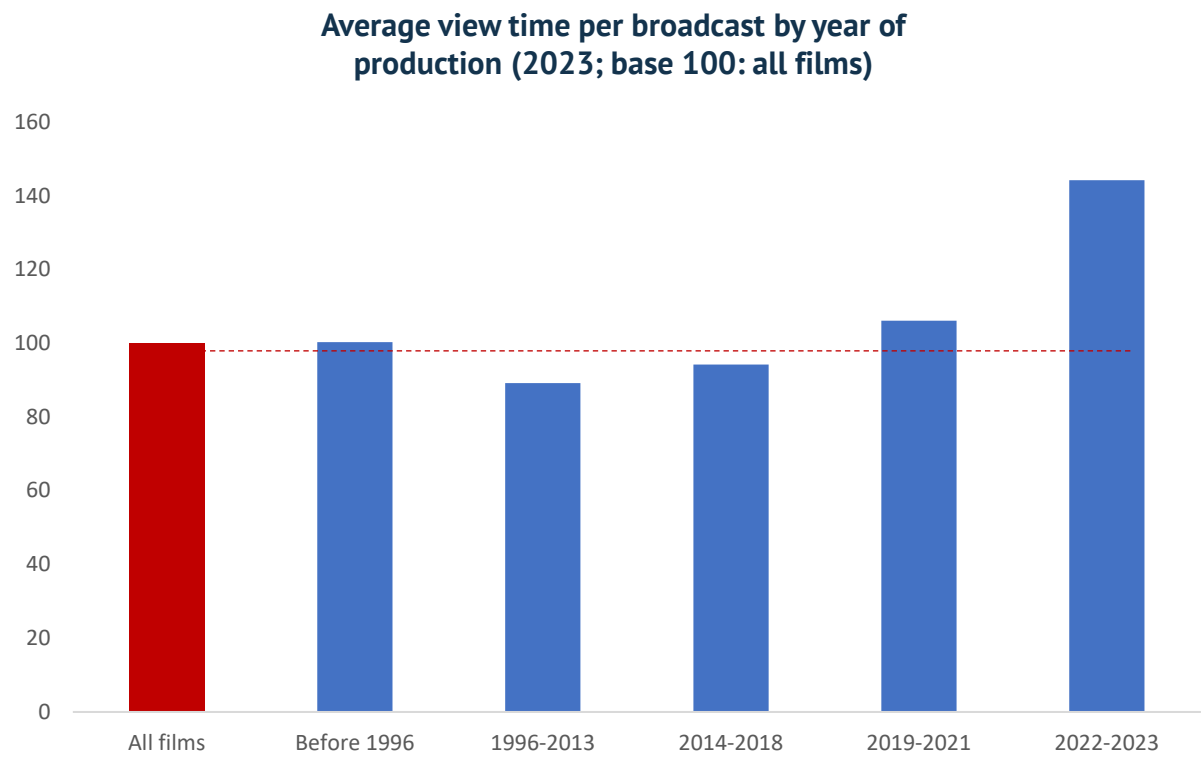
Source: European Audiovisual Observatory analysis of Glance data



Source: European Audiovisual Observatory analysis of Glance data

# Production year: recent films are more successful

Unsurprisingly, recent films get a higher view time per broadcast.

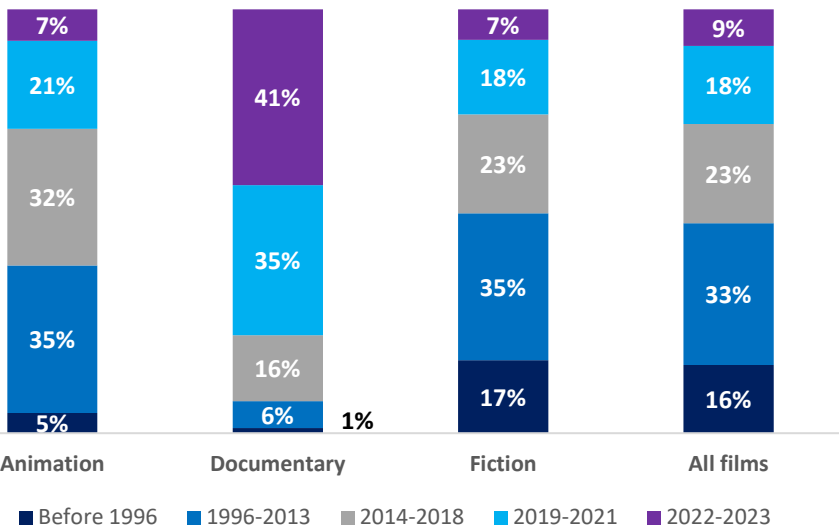


Source: European Audiovisual Observatory analysis of Glance data

# Production year by genre: documentary films are more recent

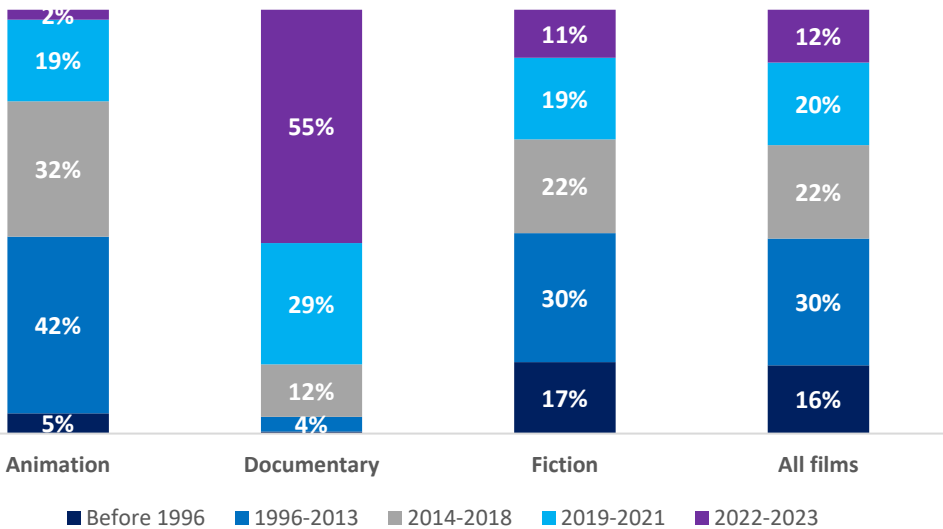
In terms of both broadcasts and view time, documentary films set themselves apart as much more recent than animation or live action films.

Breakdown of **film broadcasts** by production year (2023)



Source: European Audiovisual Observatory analysis of Glance data

Breakdown of **film view time** by production year (2023)

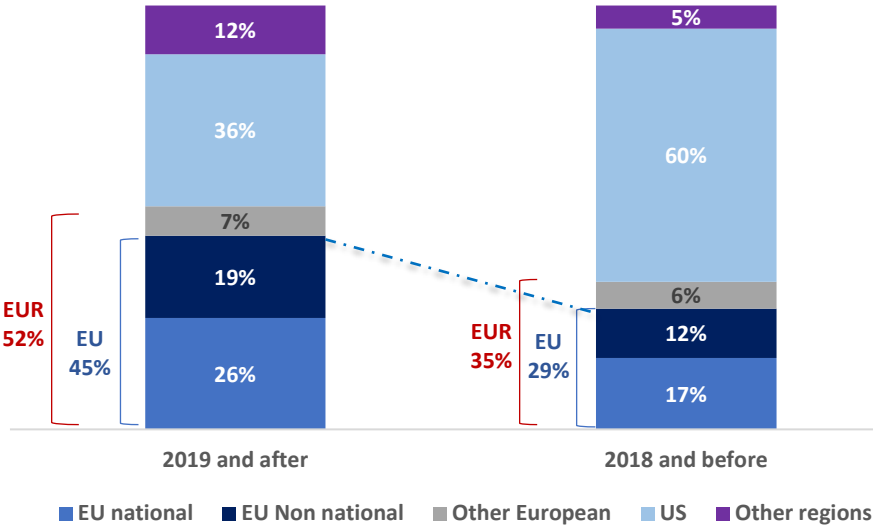


Source: European Audiovisual Observatory analysis of Glance data

# Production year: EU films more successful in recent films

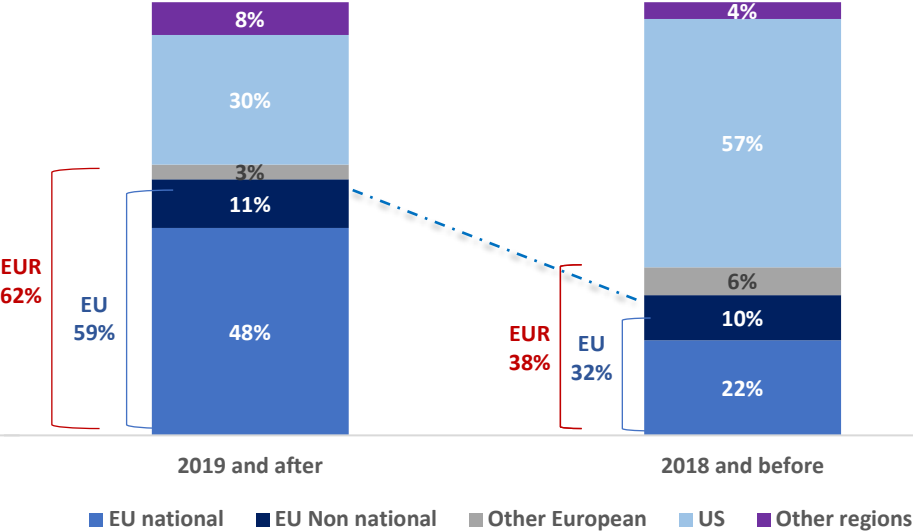
In terms of both film broadcasts and film view time, recent (aged 5years or less) national European Union films are more present and successful than European Union catalogues films.

Breakdown of **film broadcasts** by region of origin and by production year (2023)



Source: European Audiovisual Observatory analysis of Glance data

Breakdown of **film view time** by region of origin and by production year (2023)



Source: European Audiovisual Observatory analysis of Glance data

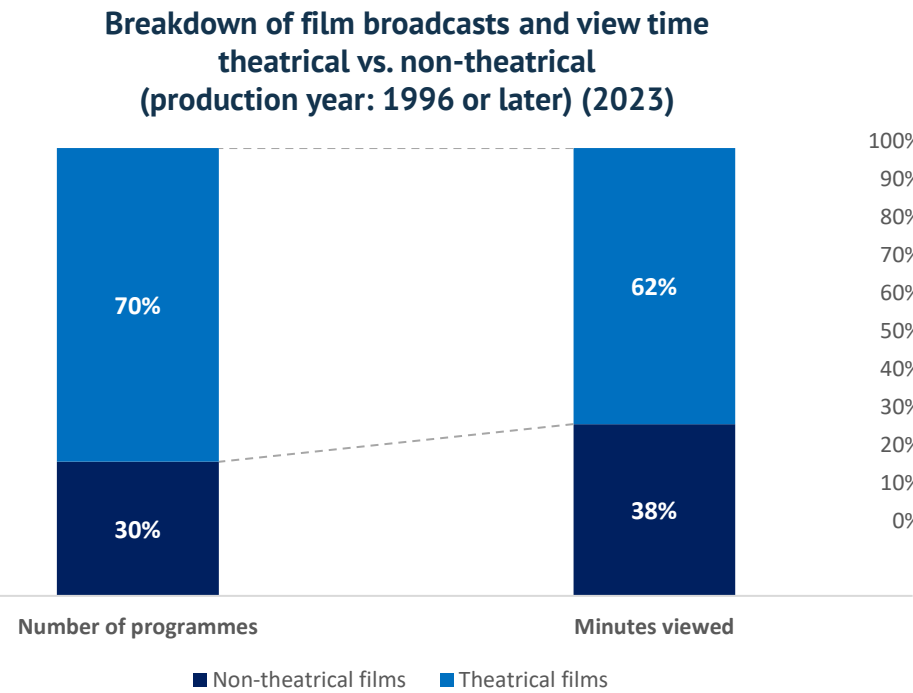
## **Breaking down the data: theatrical vs. non-theatrical**



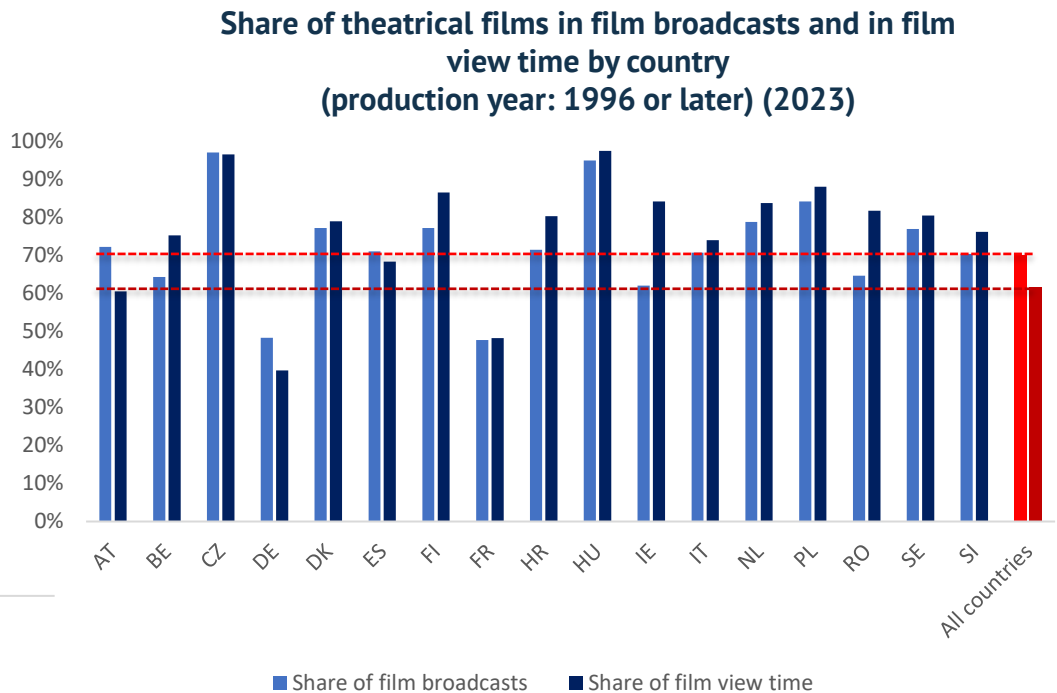
# Theatrical vs. non-theatrical: theatrical films represent the bulk and viewing

Theatrical films account for the majority of film broadcasts and, to a lesser extent, of film view time. The share of view time between theatrical and non-theatrical films broadly corresponds to their respective share of broadcasts.

Theatrical films are less dominant in countries producing a high number of TV movies (Germany, France).



Source: European Audiovisual Observatory analysis of Glance data



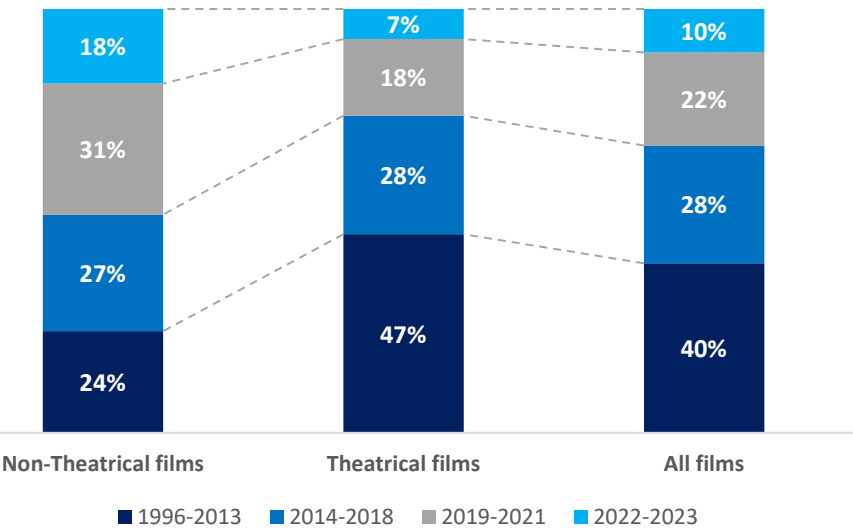
Source: European Audiovisual Observatory analysis of Glance data

# Theatrical vs. non-theatrical: TV movies over-represented in recent films

On average, non-theatrical films (TV movies, direct-to-video films) tend to be more recent than theatrical films.

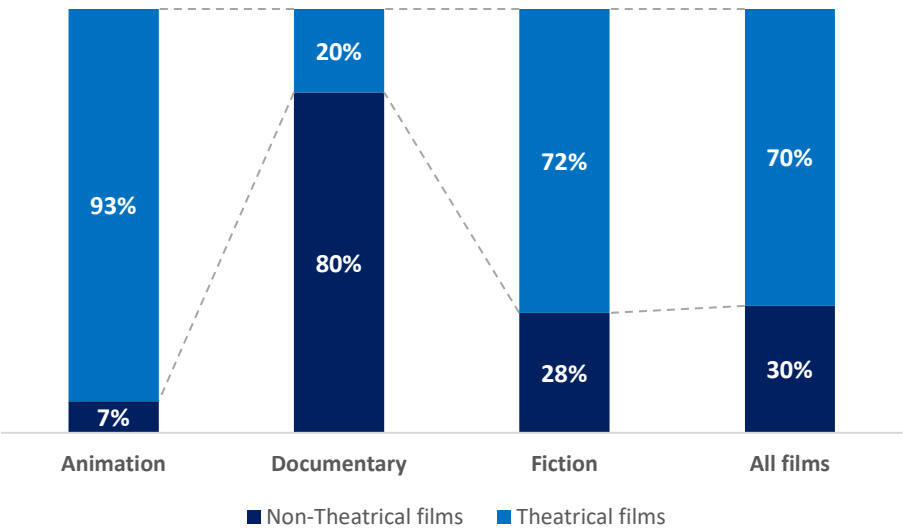
On average, the majority of documentary films are non-theatrical films.

Breakdown of **film broadcasts** by production year:  
theatrical vs. non-theatrical films (production  
year: 1996 or later) (2023)



Source: European Audiovisual Observatory analysis of Glance data

Breakdown of **film broadcasts** by genre:  
theatrical vs. non-theatrical films  
(production year: 1996 or later) (2023)

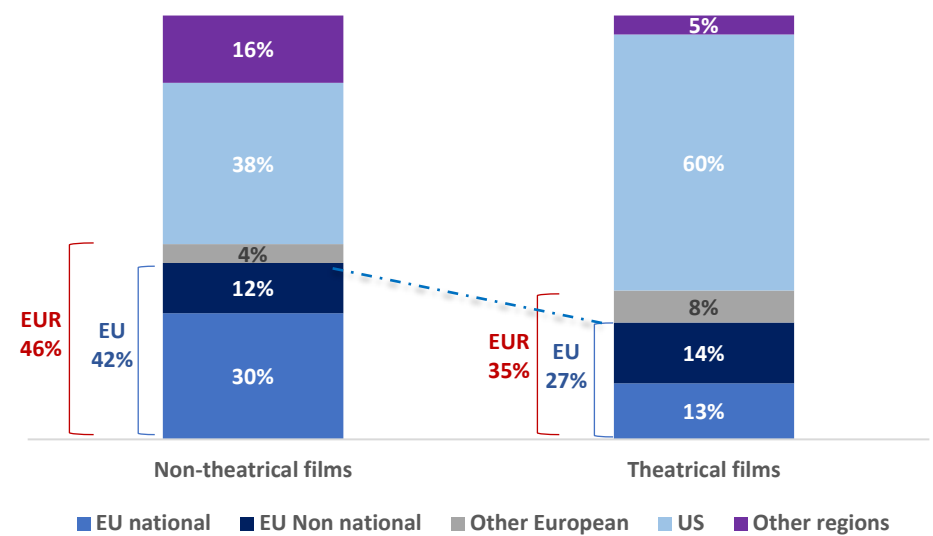


Source: European Audiovisual Observatory analysis of Glance data

# Theatrical vs. non-theatrical: EU non-theatrical films perform better than theatrical

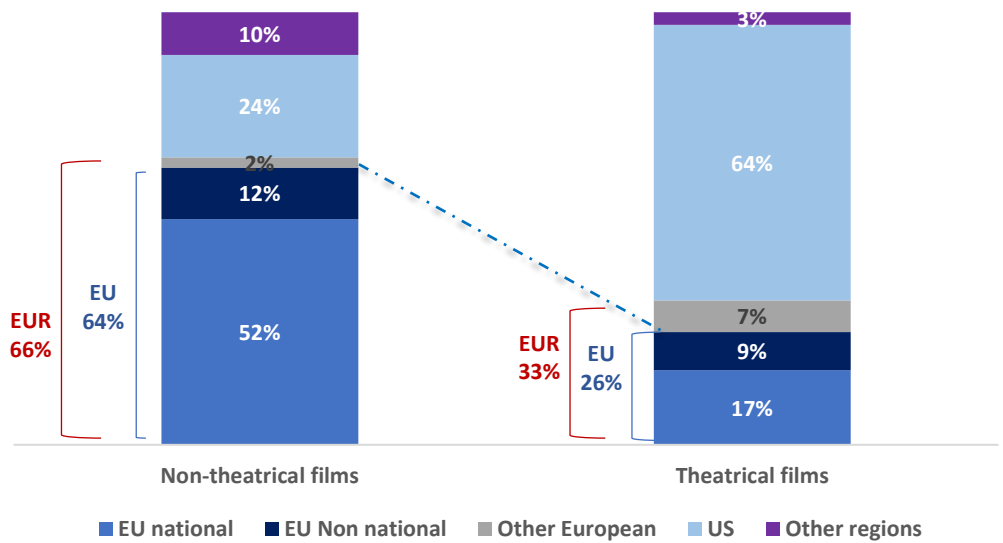
European Union films are particularly present and successful thanks to non-theatrical films (i.e. fiction and documentary TV movies produced by the TV channels), with a higher proportion of broadcasts and view time than theatrical films.

Breakdown of **film broadcasts** by region of origin: theatrical vs. non-theatrical (production year: 1996 or later) (2023)



Source: European Audiovisual Observatory analysis of Glance data

Breakdown of **film view time** by region of origin: theatrical vs. non-theatrical (production year: 1996 or later) (2023)

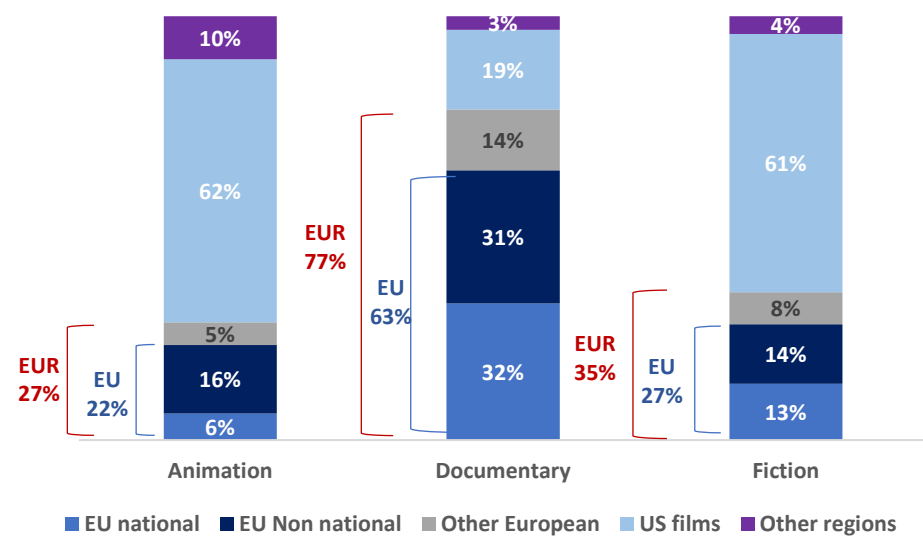


Source: European Audiovisual Observatory analysis of Glance data

# Theatrical films: high share for EU documentary films, low share for animation

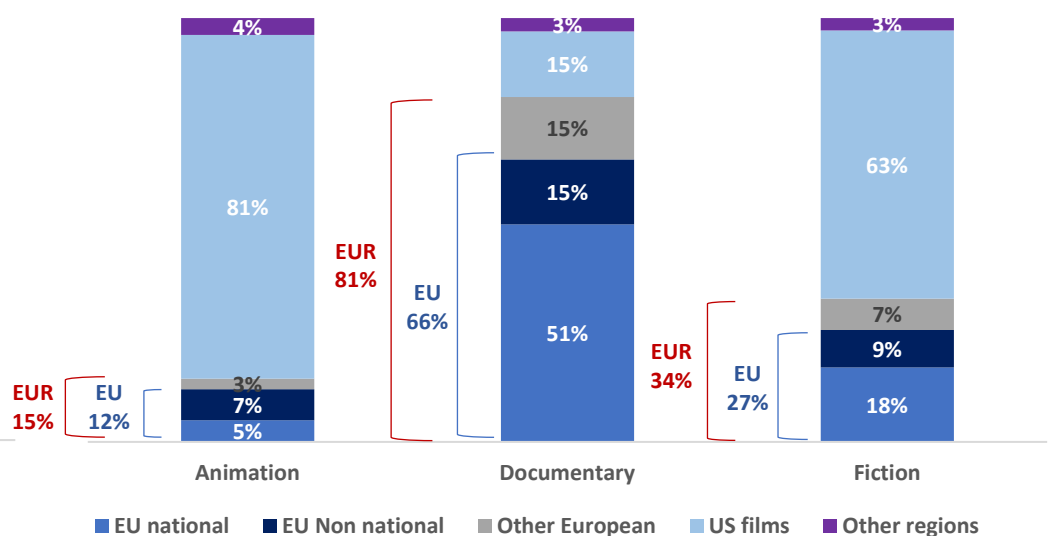
European Union theatrical documentary films reach a much higher proportion of film broadcasts and film view time than fiction and animation films from the European Union.

Breakdown of theatrical **film broadcasts** by region of origin and by genre (production year: 1996 or later) (2023)



Source: European Audiovisual Observatory analysis of Glance data

Breakdown of theatrical **film view time** by region of origin and by genre (production year: 1996 or later) (2023)

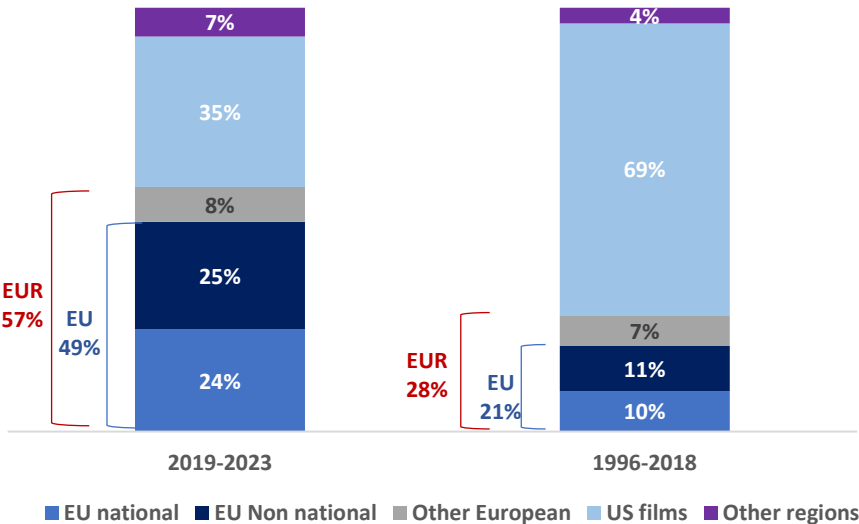


Source: European Audiovisual Observatory analysis of Glance data

# Theatrical films: higher share for recent European Union films

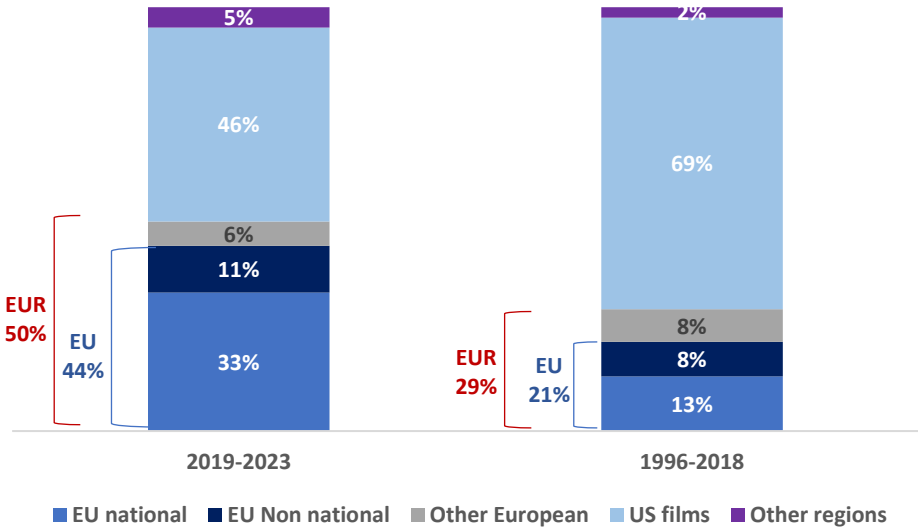
Recent theatrical films from the European Union reach a much higher proportion of recent film broadcasts and film view time than catalogue theatrical films.

Breakdown of theatrical **film broadcasts** by region of origin and by production year (production year: 1996 or later) (2023)



Source: European Audiovisual Observatory analysis of Glance data

Breakdown of theatrical **film view time** by region of origin and by production year (production year: 1996 or later) (2023)



Source: European Audiovisual Observatory analysis of Glance data

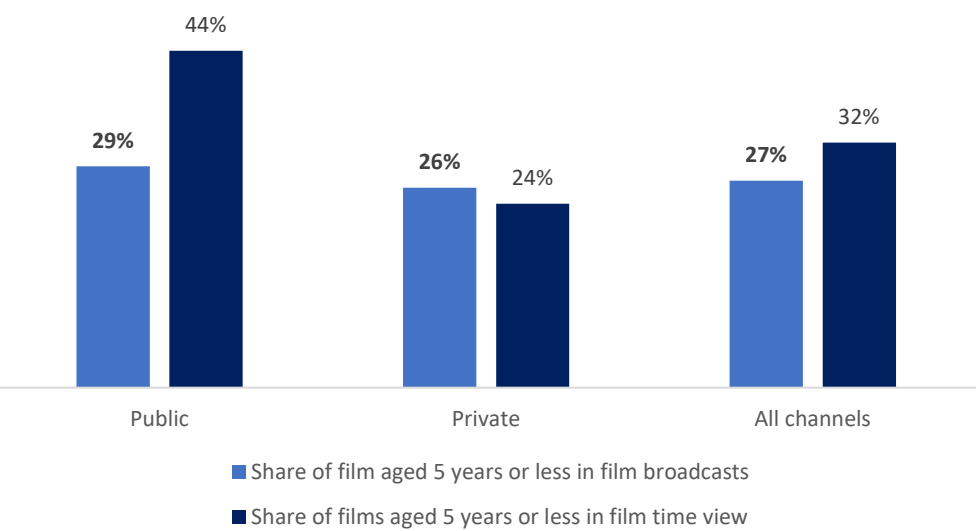
## Breaking down the data: TV channel status

# Public and private broadcasters: public TV channels rely more on recent films

On average, public TV channels offer the same proportion of recent films as private TV channels, although recent films on public TV channels are proportionally more successful on public channels than on private TV channels, possibly because of the greater involvement of public broadcasters in the financing of European films and TV movies.

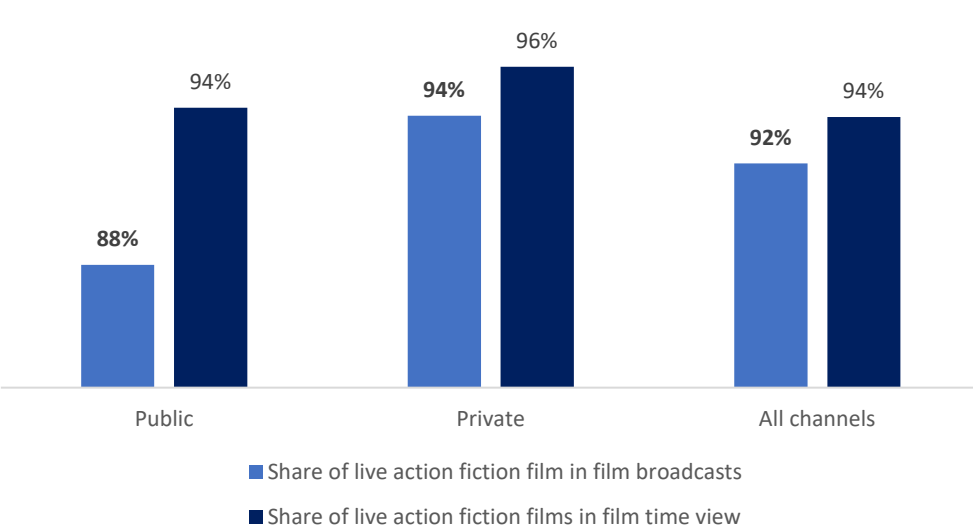
Public TV channels give slightly more space to films other than live-action fiction, but with no real impact on the concentration on viewing time on this genre of films.

Share of film aged 5 years or less in film broadcasts and film view time by status (2023)



Source: European Audiovisual Observatory analysis of Glance data

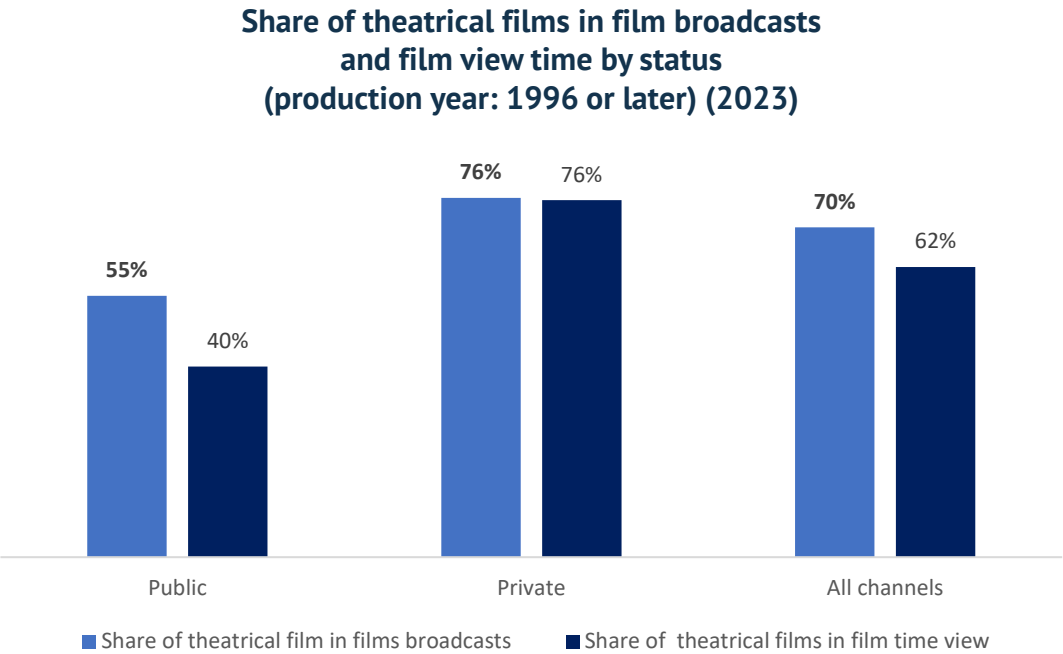
Share of live action fiction film in film broadcasts and film view time by status (2023)



Source: European Audiovisual Observatory analysis of Glance data

# Public and private broadcasters: importance of TV movies for public channels

Public channels proportionally invest in and broadcast more TV movies than private channels, and these TV movies perform comparably better than theatrical films.

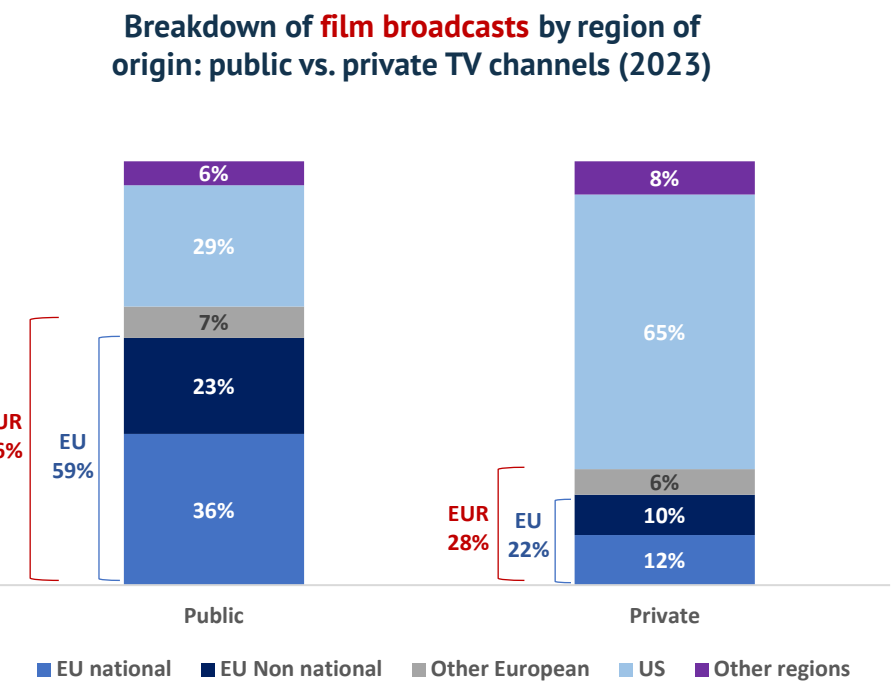


Source: European Audiovisual Observatory analysis of Glance data

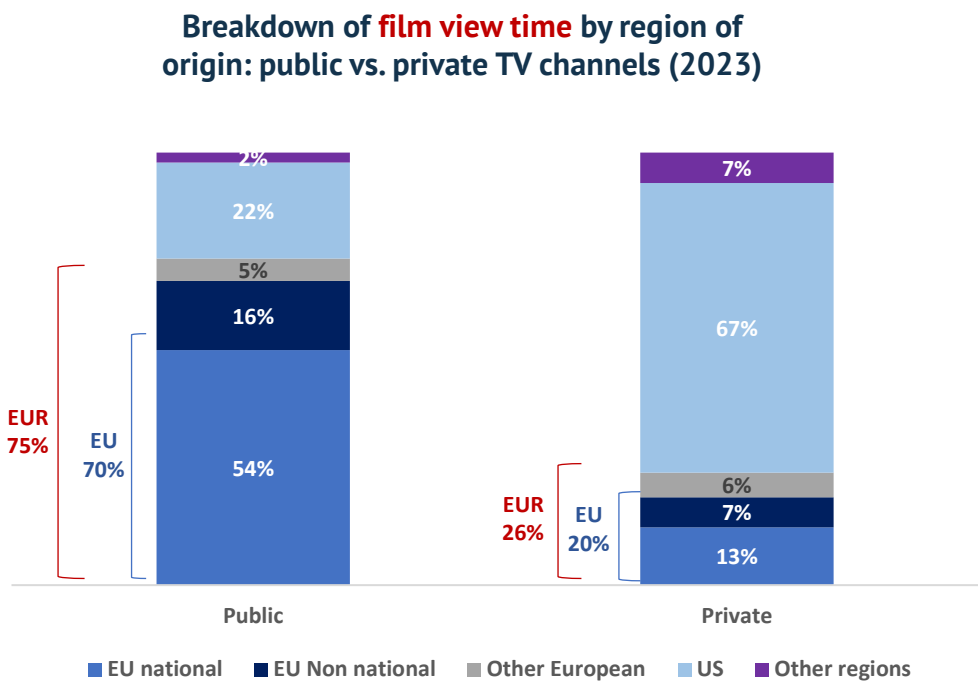


# Public and private broadcasters: public channels rely more on European films

Private and public TV channels tend to broadcast the same proportion of recent films (aged 5 years or less). However, recent films account for a larger proportion of film view time for public broadcasters.



Source: European Audiovisual Observatory analysis of Glance data



Source: European Audiovisual Observatory analysis of Glance data

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