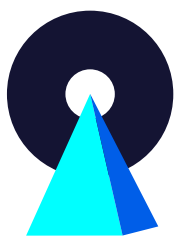


L'essentiel



Changes to the days on which films are broadcast on television: a wider choice for viewers, a mixed assessment for TV channels

Decree No. 2020-984 of 5 August 2020 modified the regime for broadcasting films on television services, by relaxing the annual broadcasting caps and programming schedules for films applicable to television services.

Arcom's analysis shows that, while the offering of films on free-to-air channels increased by 10.2% between 2019 and 2021, with a total of 2,929 films broadcast in 2021, the exposure of film in the early evening has only marginally increased, with the additional offering of films being available mainly in the second half of the evening.

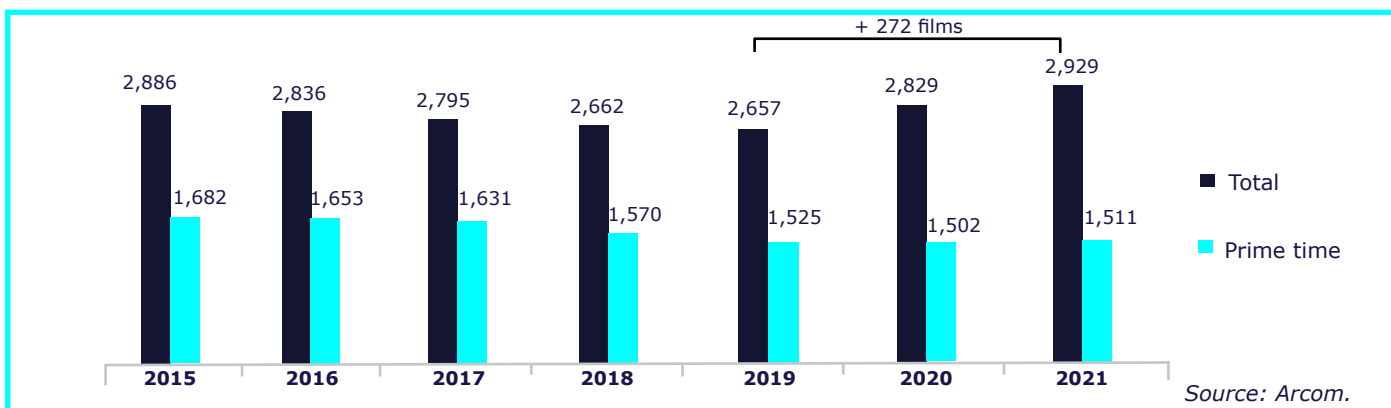
On the other hand, channels made greater use of the opening of the "blackout days" to better distribute their film offering over weekday evenings.

Limited effects of raising the cap on the number of films broadcast

Between 2019 and 2021, the **total number of film broadcasts increased by 10%**, from 2,657 to 2,929 broadcasts. On the other hand, there was **no increase in the number of broadcasts during prime time** (8:30-10:30 pm): all free national channels combined, there were even fourteen fewer broadcasts in

this time slot between 2019 and 2021. **The downward trend in the broadcasting of films in the evening has therefore not been halted for the time being.**

Figure 1: Total number of film broadcasts (national free television) - 2015-2021



Similarly, the variety of the offering has increased only to a lesser extent: **only 41 additional different titles were broadcast on the seventeen free DTT channels offering films in 2021, i.e., an increase of 2.4%**

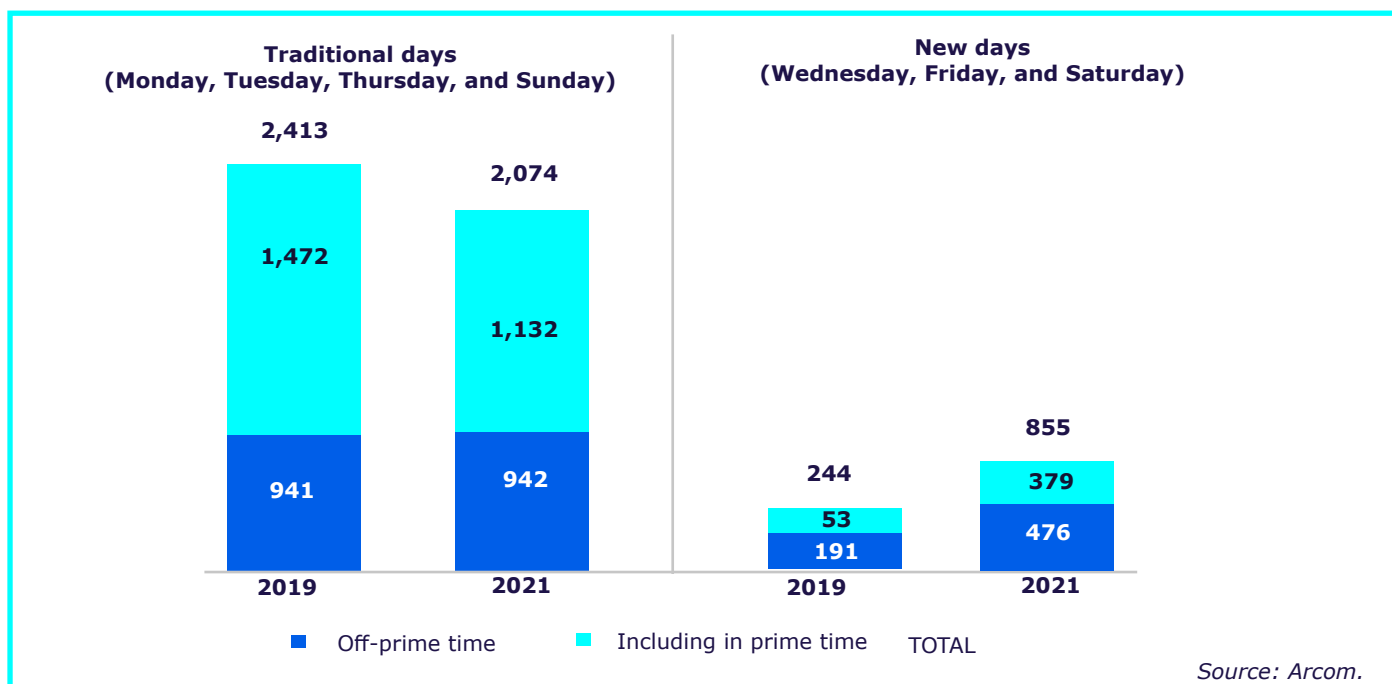
compared to 2019 (RMC Story having broadcast no films in 2021). The replay rate for works increased from 1.5 to 1.7 between 2019 and 2021.

Greater flexibility for viewers

The opening up of the blackout days has been beneficial in spreading out film broadcasts over the days of the week, which ultimately ensures better exposure of film on television. The number of films broadcast on Wednesdays,

Fridays and, to a lesser extent, Saturdays, increased by a factor of 3.5, to 855 broadcasts, of which 379 were broadcast during prime time.

Figure 2: Change in the number of broadcasts of films by type of day (national free television)



The Wednesday and Friday evening slots are attracting interest from the channels, while Sunday evenings remain essential

Even if the “traditional” time slots (Sunday and Thursday evenings in particular) remain favoured by broadcasters, **Wednesday and Friday evenings were heavily used in 2021**: 165 broadcasts on Wednesdays and 188 on Fridays, i.e., an average of 3.2 films per week for the former and 3.6 for the latter: in other words, in 2021, **every Wednesday evening and every Friday evening, viewers had a choice of at least three films** starting before 10:30 pm, offered on a free national terrestrial channel.

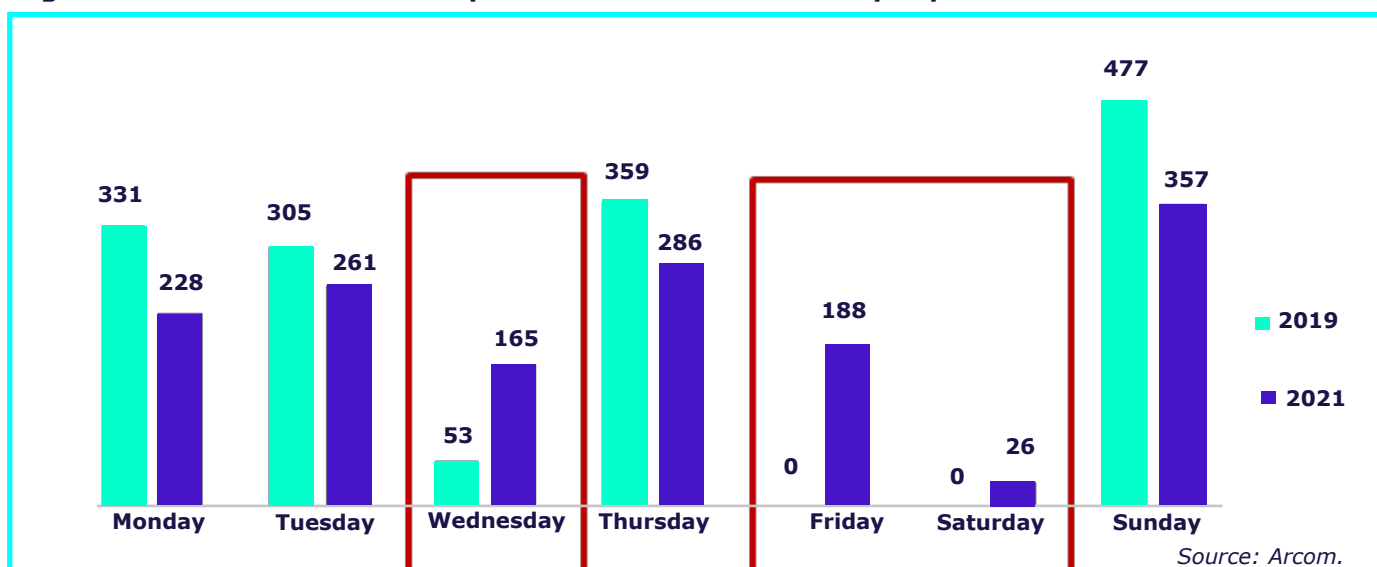
Wednesday evenings were used by 6ter and CStar in particular. Regular Friday evening slots were scheduled by Chérie 25 and TF1 Séries Films.

On the contrary, the Saturday evening slot was less used (one film every fortnight on average), probably due to the remaining restrictions on the broadcasting of films at this

time slot and the specific programming of the free national channels, with broadcasters favouring “all-audience” family programming focused on unifying entertainment. Similarly, the possibility of opening a “film” slot on Sunday afternoons has been little used, except by Gulli in the early afternoon and NRJ 12 in access prime time.

Nevertheless, a study of the twenty best film audiences in 2021 shows that all of them took place on a Sunday evening, with the exception of one on a Monday evening: **the Sunday evening film slot remains the preferred film slot for viewers.**

Figure 3: Trends in the number of prime-time film broadcasts, by day¹



Focus: the changes brought about by the decree

	Old legislation	New legislation
Non-film oriented channels		
Maximum number of film broadcasts allowed (number of broadcasts)	192	244
Of which during prime time (8:30 - 10:30 pm)	144	196
Of which art house films	52	52
Film "blackout" days	Wednesday and Friday evenings, Saturday, Sunday before 8:30 pm	Elimination of "blackout" days, but specific conditions for Saturday evening
Film channels		
Maximum number of films allowed (number of different titles)	500	800
Film "blackout" days	Saturday from 6 to 11 pm, Sunday from 1 to 6 pm	Elimination of Sunday blackout, reduction of Saturday blackout

Uneven results for the channels

Not all audiovisual groups took advantage of the opening

The private groups TF1 and M6 have largely benefited from the change in caps by massively increasing the offering of films on their various channels, by 25% for TF1 (185 additional broadcasts) and 29% for M6 (194 additional broadcasts). L'Équipe has increased its film offering more than fivefold (54 film broadcasts in 2021 compared to 10 in 2019).

In contrast, the public sector saw the number of films broadcast fall by 22% between 2019 and 2021, this decrease being due to the editorial reorientation of France 4 (creation of the CultureBox slot) and the development of the non-linear France.tv offering.

Finally, the NRJ group's offering declined by 3.3%,

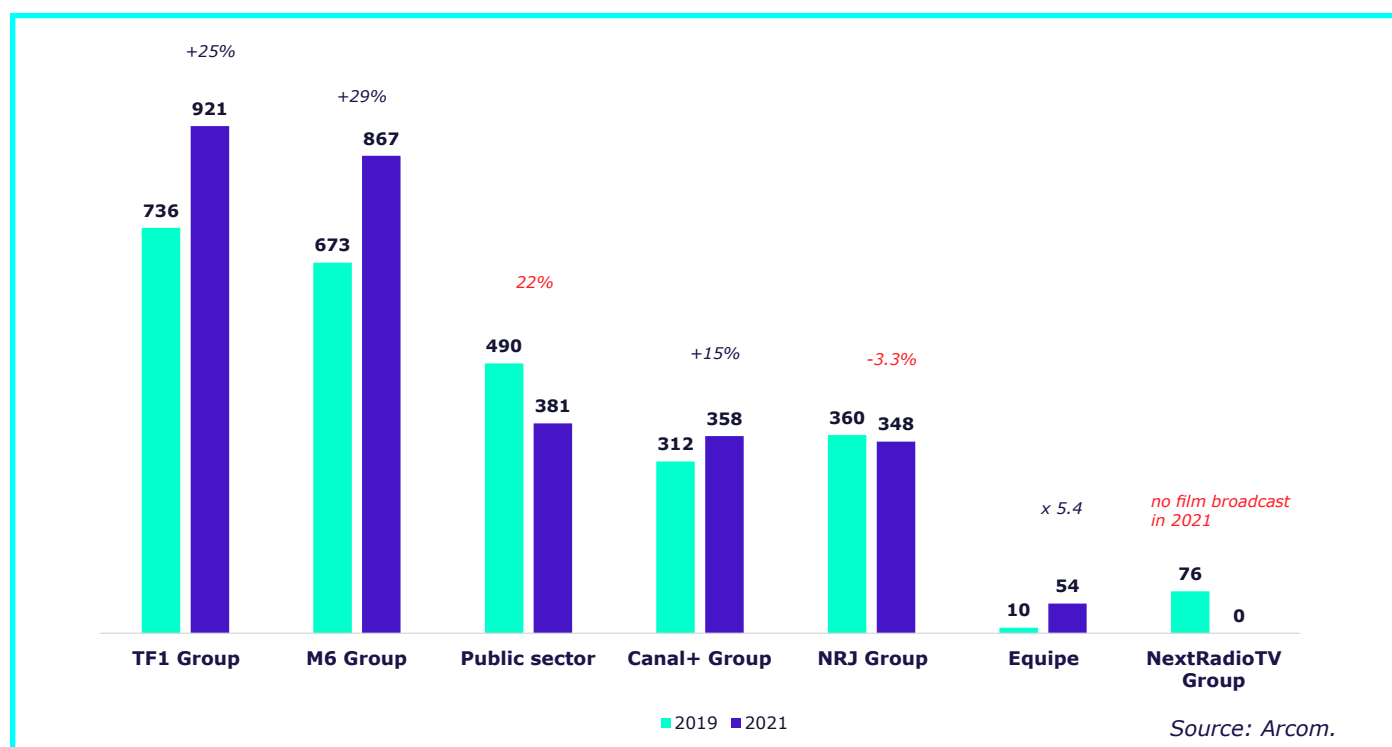
while the Nextradio group did not broadcast any films in 2021.

Nine free-to-air national channels offered more than 192 broadcasts of films, the former annual regulatory cap, of which only three reached the new cap of 244 broadcasts in 2021.

The seven television channels that programme the most films remain the DTT channels launched from 2005 onwards, as opposed to the so-called historical channels whose film offering is more limited (TF1, France 2, France 3 and M6).

¹ Before the modification of the cinema broadcasting schedule, France 4 was the only channel to have a derogation allowing it to broadcast films on Wednesday evenings, in return for increased investment by the France Télévisions Group in film production.

Figure 4: Change in the number of broadcasts of films, by audiovisual group (total broadcasting)



In 2021, no channel reached the maximum prime-time cap of 196 films. Only three channels, 6ter, C8 and TMC, offered more than 144 broadcasts of films in this

time slot (the old cap) in 2021, with 148 broadcasts for the first and 146 for the next two channels.

Less use of new opportunities by film channels

None of the film channels studied benefited in 2021 from the increase in the cap on the number of titles, since none of them even exceeded the old cap (none of them broadcast more than 500 different titles).

Most even offered fewer different films, although the number of film broadcasts (initial broadcasts plus replays) may have increased. However, as the last few years have been somewhat atypical due to the Covid-19 pandemic, this should perhaps be seen as an effect of the crisis on filming.

For the Canal Plus Group, only the Canal+ Décalé and Canal+ Sport channels have increased the number of different titles broadcast compared to 2019 (28 and 50 additional titles respectively). In contrast, the Canal+ Premium service offered 39 fewer different titles compared to 2019, and across the service Canal+ 151 fewer different titles. Similarly, the Ciné+ channels show a decrease in the number of different films offered, despite a slight increase in the number of film broad-

casts. On the other hand, on OCS there was a slight increase in the number of broadcasts and the number of different films.

Prime time devoted to the broadcasting of films are unchanged compared to 2019 and the easing of the Saturday evening slot has only been used by those channels of the Canal+ service that were already broadcasting films in 2019 in this time slot.

In contrast, Canal+ Premium, Canal+ Cinéma, Canal+ Décalé, Canal+ Family and Canal+ Sport have taken advantage of the possibility to broadcast films on Sunday afternoons, for a total of 279 broadcasts in 2021. With 111 broadcasts, Canal+ Cinéma is the channel that broadcasts the most on that day.

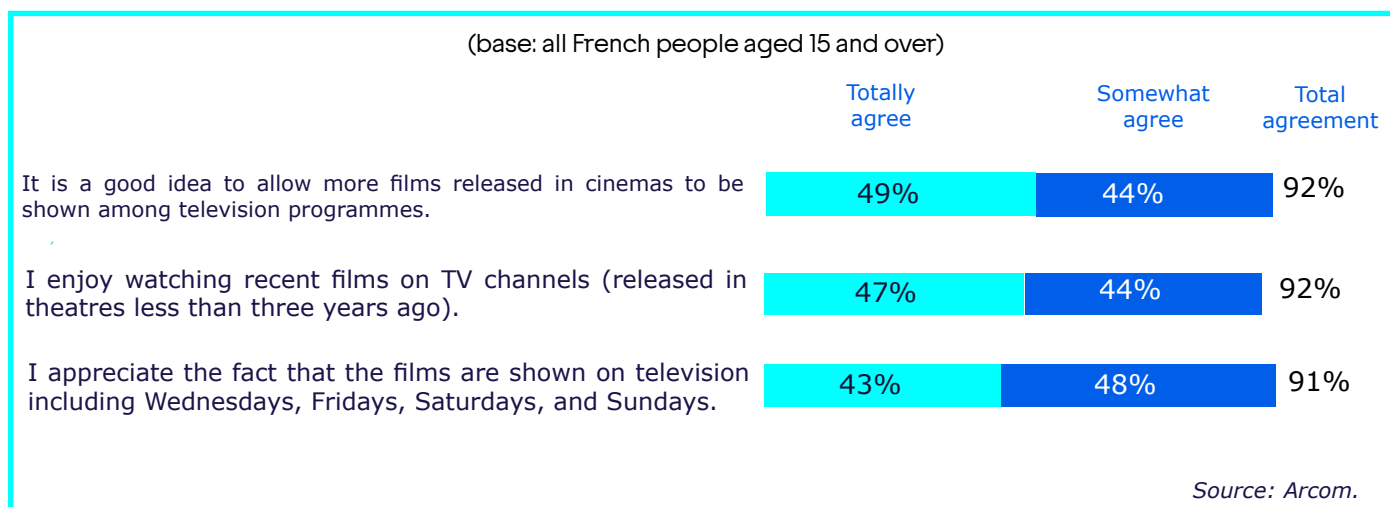
Measures little noticed but approved by the audience

The French seem to **have taken little notice of the measures to relax the broadcasting of cinema films on television**. Only 19% spontaneously believe that channels have broadcast more films over the last two years, while 43% feel that they broadcast the same number and 38% feel they broadcast less.

broadcasting of films, the opening up of previous blackout days or the possibility of broadcasting more recent films allowed by the new media chronology, the three measures all show very high approval scores, by more than 90% of the French.

The relaxation of the rules seems to be widely approved. Whether it is the increase in the volume of

Figure 5: Attitudes towards relaxing the rules for broadcasting films on television



These measures could also have positive effects on television consumption. For example, **70% of French people surveyed said that the increase in the**

number of films shown on television makes them want to watch it more frequently.

Key lessons

- The number of films broadcast on TV has increased by more than 10% between 2019 and 2021. The TF1 group (+25% of films broadcast) and the M6 group (+29%) benefit the most, while the France Télévisions group sees a global offering decrease overall (-22%), due to the editorial reorientation of France 4.
- The diversity of films broadcast on TV is not increasing much: only 41 more different titles in 2021.
- The opening of the new days ensures a better distribution of evening broadcasts in prime time and particularly benefits Wednesday evening (165 films broadcast in 2021) and Friday evening (188 films). On the other hand, the use of Saturdays remains low (26 films).
- Although the measure is not very visible to the French, over 90% approve of its principles and benefits.

Methodology:

Constant scope of eighteen free national television channels (DTT channels, excluding Arte, parliamentary channels, France Ô whose broadcasting stopped in August 2020, news channels and RMC Découverte, which do not broadcast films) and film channels (Canal+, Ciné+ and OCS).

Quantitative analyses:

- film broadcasting data (internal Arcom data, based on declarations from TV channels for Ciné+ and OCS);
- Médiamétrie/Mediamat TV audience data, based on viewers aged 4 and over;
- quantitative study carried out online by Ifop among a sample of 1,050 individuals aged 15 and over representative of the French population (quotas: age, gender, CSP, geographical region and municipality size).

For further reading: www.arcom.fr

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