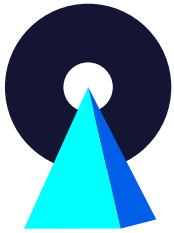


L'essentiel



Programming for national free-to-air television in 2022: overall programming dominated by news for the fifth year running

The key figures for the 2022 programming of national free-to-air television channels, both public and private, highlight the development and distribution of the different genres (news, documentary, magazine shows, cinema, audiovisual drama, animation, entertainment, sport and advertising) in a post-Covid context.

News remains the most broadcast genre in 2022, for the fifth year running, with the four 24-news news channels (BFMTV, CNews, Franceinfo and LCI) accounting for 79% of overall news programming.

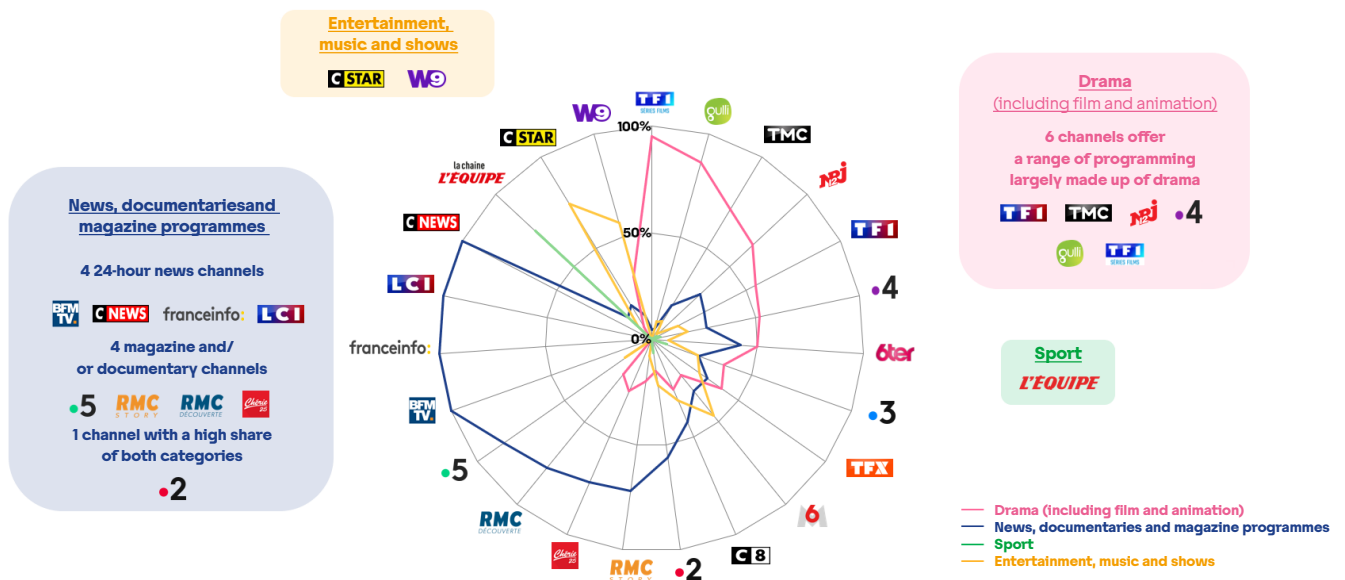
Audiovisual drama (excluding animation) also occupies an important place in overall channel programming (particularly on TF1, the leading broadcaster of this genre among the channels surveyed, and on France Télévision, the leading broadcaster of French-language drama), even though the trend has been downwards overall since 2018.

Overall breakdown of free-to-air programming in 2022

In 2022, free-to-air programming was split into **four main categories**: **drama, information/discovery, sport and entertainment**, making it possible to establish a typology

of channels based on their programming by genre (excluding advertising, design, self-promotion and teleshopping).

Figure 1: Breakdown of free-to-air offer by programming genre

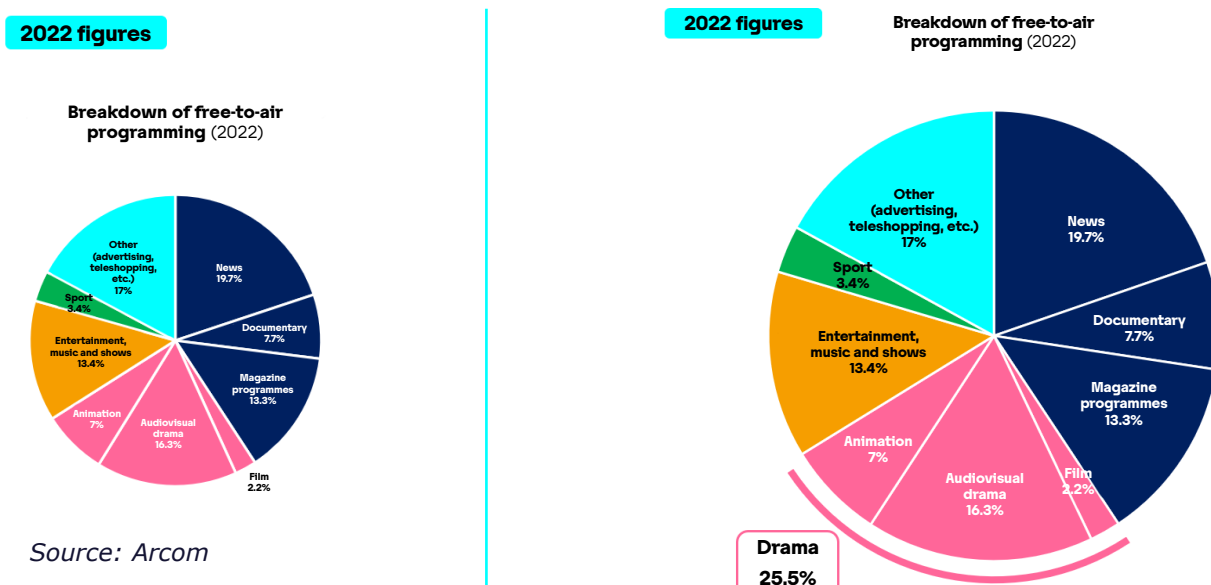


Source: Arcom

Two-thirds of programming is made up of **news, documentaries and magazine shows** on the one hand, and drama (animation, audiovisual drama and cinema) on the other.

For the fifth year running, **news is the most popular genre**, ahead of drama (excluding animation). **Taking all drama formats together** (including animation and films), **this category of programme is the most widely broadcast**, accounting for 25.5% of total broadcast time.

Figure 2: Percentage distribution of free-to-air programming

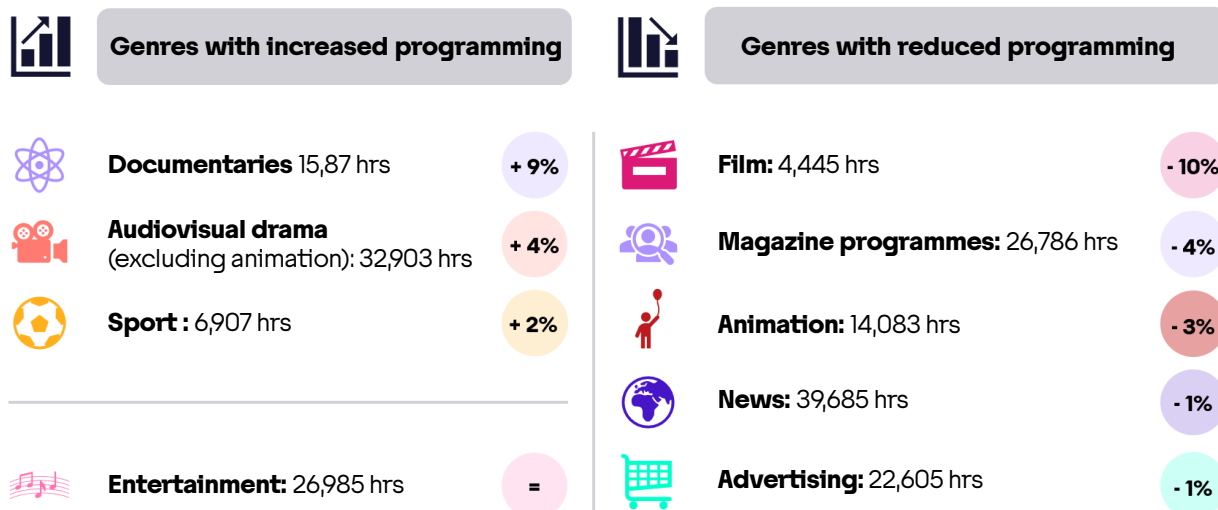


Changes in programme genres between 2021 and 2022

Between 2021 and 2022, significant changes were observed in two programme genres: **documentaries, which rose by 9%** (due in particular to a 500-hour increase on RMC Story), without however returning to the 2018 level, **and film, which fell by 10%** (due in particular to a reduction in the offerings of the France Télévisions and NRJ groups). To a lesser extent, there was an increase in audiovisual

drama (excluding animation) and sport, and a decline in magazine programming, animation, news and advertising. The entertainment offering, meanwhile, remained stable.

Figure 2: Growth in free-to-air programming by genre between 2021 and 2022

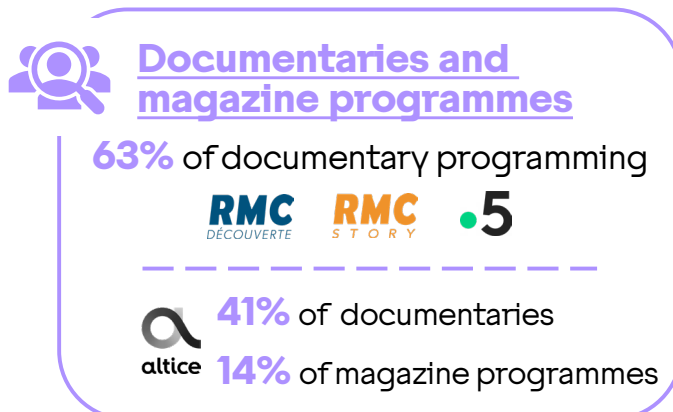
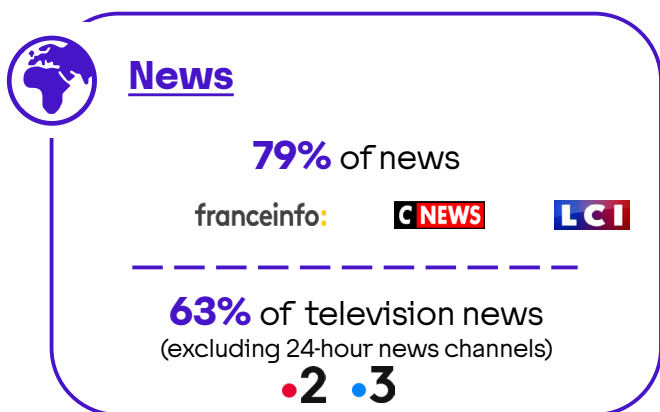


Key findings by programme genre

The proportion of programme genres broadcast on the 23 national free-to-air television services varies from channel to channel. In addition to news and drama (excluding

animation), the main figures for 2022 are shown below.

Figure 3: Key findings by programme genre (%)



Breakdown of total programming by media group



▪ **Downward trend** since 2018 (-2,773 hours)

+1,300 hours

broadcast by **RMC** **RMC** **5**
DÉCOUVERTE STORY



Film

65% of film programming



46% of broadcasts are French-language feature films



Audiovisual drama

46% of audiovisual fiction



34% of French evening drama

2 **3**



-12%

i.e. - 77 broadcasts, **between 2018 and 2022**

+4%

i.e. - 241 broadcasts **between 2021 and 2022**



-12%

i.e. - 4,622 hours **between 2018 and 2022**

+4%

i.e. + 1,325 hours **between 2021 and 2022**

Source: Arcom



Sport

la chaîne **L'ÉQUIPE** **77%** of sports programming
59% of sports broadcasts

80% of sports broadcasts
(excluding L'Équipe)
france•tv



- **Increase** of 2% in 2022 (+106 hours)

45%

of sports broadcasts within total sports programming



Entertainment

94% of music programming



•tv **64%** of live shows
40% of game shows



Breakdown of overall entertainment programming

35%

Other

32%

Music
(excluding concerts)

22%

Game shows

11%

Concerts

Key lessons

- In 2022, for the fifth year running, news is the most popular genre, ahead of drama (excluding animation);
- Taking all drama formats together (including animation and films), this category of programme is the most widely broadcast in 2022, accounting for 25.5% of total broadcast time;
- Significant changes were observed in two programme genres between 2021 and 2022: documentaries, which rose by 9% (due in particular to a 500-hour increase on RMC Story), without however returning to the 2018 level, and film, which fell by 10% (due to a reduction in the offerings of the France Télévisions and NRJ groups);
- To a lesser extent, there was an increase in audiovisual drama (excluding animation) and sport, and a decline in magazine programming, animation, news and advertising. The entertainment offering, meanwhile, remained stable.

Methodology

Document based on data from channel monitoring and control carried out by Arcom. The scope for 2022 includes 23 national free-to-air television services over which Arcom exercises control, namely:

- **France Télévisions group** (France 2, France 3, France 4 for the first full year of its new editorial line), France 5 and Franceinfo ;
- **TF1 group** (TF1, TMC, TFX, TF1 Séries Films and LCI);
- **M6 group** (M6, W9, 6ter and Gulli);
- **Canal+ group** (C8, CStar and CNews);
- **Altice group** (RMC Story, RMC Découverte and BFM TV);
- **NRJ group** (NRJ 12 and Chérie 25);
- **Amaury group** (L'Équipe).

The following channels are excluded from the scope: Arte, LCP, Public Sénat.

Insignificant hourly volumes (less than 1% of the total hourly volume studied) are not taken into account in the graphs (with a few exceptions, in particular so that each diagram represents 100%).

For further reading: www.arcom.fr

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