Works on television in Europe
2023 edition

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Introduction and methodology

This report provides an analysis of the broadcast of films and TV shows in the European Union and in wider Europe.

Scope of the report

- This report deals with only a **fraction of programmes broadcast by television channels**. Regarding TV shows, the following categories are excluded, as far as possible: sports, news, games, talk shows, reality shows, music, education, religion. Factual programmes are included. But the delineation between programming genres faces significant limitations.
- The report aims mainly at answering the following **research questions**:
  - How many different works are on offer on television and, among them, how many European works?
  - What is the origin of programmes broadcast on TV?
  - Were there any significant developments between 2018 and 2022?
- **This report does not intend to measure the quotas foreseen in the AVMS directive**. In particular this report focuses on first runs and not all runs by a given TV channel; it uses, as the main indicator, number of films or TV show seasons and not duration; it deals with programming genres that are not aligned with the legal definitions of 'works', at least in certain countries.

The sample used for the report

- The European Audiovisual Observatory commissioned Metaprofile with drawing up a title-by-title list of all programmes corresponding to the above-mentioned categories broadcast between 2018 and 2022 by a selection of TV channels.

The sample used for the report (cont.)

- The sample provided by Metaprofile comprised **1 311 TV channels** from **33 European countries**, with, for about 40% of the TV channels, time series dating back to 2018.
- The programming schedules of these 1 311 TV channels included over 1.3 million first runs, i.e. excluding reruns by the same TV channel.
- Considering the heterogeneity of the dataset in terms of time series, the Observatory adopted a two-fold approach:
  - An analysis of the full sample for the year 2022.
  - An analysis of developments from 2018 to 2022, limited to TV channels for which programming data was available for the five years.

Definitions of key variables and indicators used in this report

- Geographic scope:
  - European Union ("EU"): AT; BE; BG; CY; CZ; DE; DK, EE; ES; FI; FR; GR; HR; HU; IE; IT; LT; LU; LV; NL; PL; PT; RO; SE; SI; SK).
  - Europe: European Union + AL; BA; GB; ME; MK; NO; RS.
- Number of audiovisual works:
  - One film is accounted for as one audiovisual work; one TV show season is accounted for as one audiovisual work.
  - Reruns of the same work by the same TV channel are not accounted for.
- Categories of broadcasters – the report uses the following concepts: free and pay TV; public and private TV; major channels (TV channels with an audience share of at least 1%).
- Broadcast during prime time: any programme with at least one broadcast during prime time, i.e. between 19:30 and 22:00.

Definitions of key variables and indicators used in this report (cont.)

- Export: broadcast of one work in one channel of a country other than the main producing country.

Limits

- Identification of films: films are labelled as such in the TV channels' programming schedules; this does not imply that they have been theatrically released in Europe.
- Allocation of country of origin: the allocation of country of origin was provided by Metaprofile and errors may have occurred for individual titles.
- Prime-time concept: the prime-time definition could not be specified by country and therefore may imperfectly reflect primetime in individual countries.
- Year of production: the year of production was available for only the first season of a TV show and therefore the analysis of the age of works broadcast could only be performed for films.
- Genres: the classification of works as animation, documentary and fiction has big limitations as programmes are tagged with several non-comparable tags.

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Key findings

Key findings (1/3)

A very large number of works* were exploited on television in 2022

- Over 88 000 works in the EU and over 155 000 works in wider Europe were broadcast at least once.
- The figure includes over 27 000 and over 32 000 European films in the EU and in wider Europe, respectively.
- On average, about 2 300 European films and 1 300 European TV show seasons were broadcast in a given country.

A high share of European works

- European works accounted* for 43% of works broadcast in the EU in 2022, almost on a par with US works (46%).
- Among European works, EU27 works accounted for 70% and other European works for 30%.
- Figures were similar when considering not only EU countries but wider Europe.

A higher share of European works for TV shows

- Be it in the EU or in wider Europe, the share of European works was higher for TV shows (measured in number of seasons) than for films.
- The higher share for TV shows was primarily driven by TV shows produced in the UK, but also by a higher share for EU27 TV shows distributed within the EU.

A higher share of European works for documentary films

- About two thirds of documentary films broadcast were European, vs. about 40% for all films.

* See definitions in section « Introduction and Methodology »

Key findings (2/3)

A higher share* of European works for TV channels with an audience share of 1% or more

- Be it in the EU or in wider Europe, the share of European works was also higher for free TV channels and public TV channels.

More European non-national works than national works

- In wider Europe, European non-national works accounted for over 60% of European works.
- In the EU, EU27 national works accounted for 36% of European works, EU27 non-national works for 34%, and other, non-EU European countries for 30%.
- The share of European national works was higher than the average for TV channels with an audience share of 1% or more, for free TV channels and public TV channels, respectively.

Relatively recent films

- Films aged 10 years or less accounted for 52% and 56% of all films broadcast in the EU and in wider Europe, respectively.
- US films broadcast were slightly older than films produced in the EU or in another non-EU European country.

The top 5 largest countries in Europe are the main exporters of European works

- The United Kingdom is by far the primary exporter of European works both in the EU and in wider Europe.
- UK exports are driven by films funded by US studios and UK homegrown TV shows.

* See definitions in section « Introduction and Methodology »

Key findings (3/3)

A 2018-2022 perspective: In the EU*

- The share of European works broadcast in the EU increased at the expense of US works, driven both by EU27 and other European works.
- This increase was driven primarily by TV shows, again both from the EU27 and from other, non-EU European countries, and more by national than non-national TV shows. Among EU27 TV shows, the growth was driven more by national than by non-national TV shows.
- The number of European films, both from EU27 and other European countries, increased more modestly, and was driven more by non-national than national films.

A 2018-2022 perspective: In wider Europe*

- The share of European works broadcast in the EU increased at the expense of US works, driven mainly by other, non-EU European works – primarily UK films.
- Conversely, the number of EU27 films broadcast stagnated.
- Both EU27 TV shows and other non-EU TV shows also increased, but more modestly.

* Based on a sample of channels for which time series were available.

Works available on TV in 2022

Sample: 1 311 TV channels

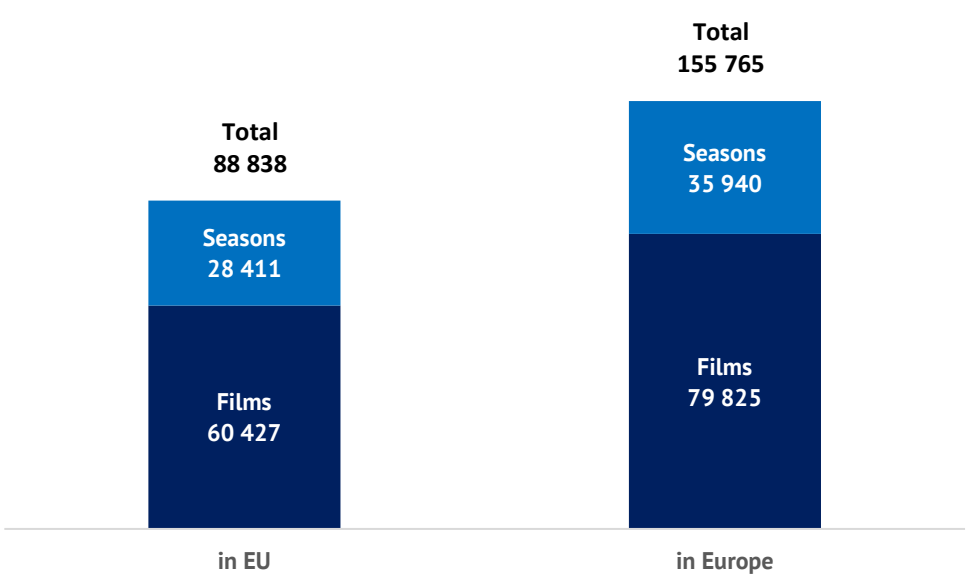
Works available

Number of works in exploitation

A very large number of works were exploited on television in 2022 in the EU and in Europe:

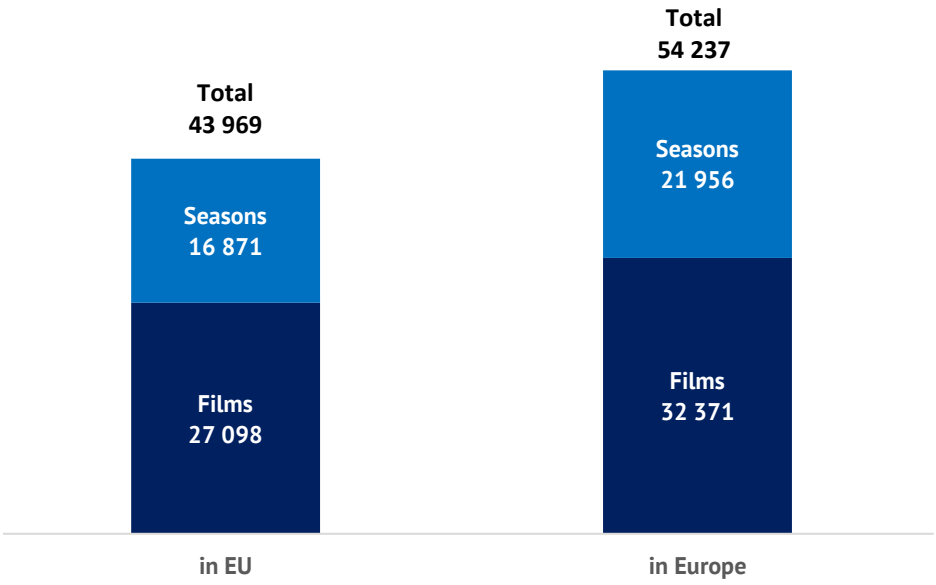
- 60 000 different films and 28 000 different TV show seasons (EU);
- Including 27 000 European films and 17 000 European TV show seasons.

Number of different films and series exploited on TV (2022)



Source: European Audiovisual Observatory analysis of Metaprofile data

Number of different European films and series exploited on TV (2022)

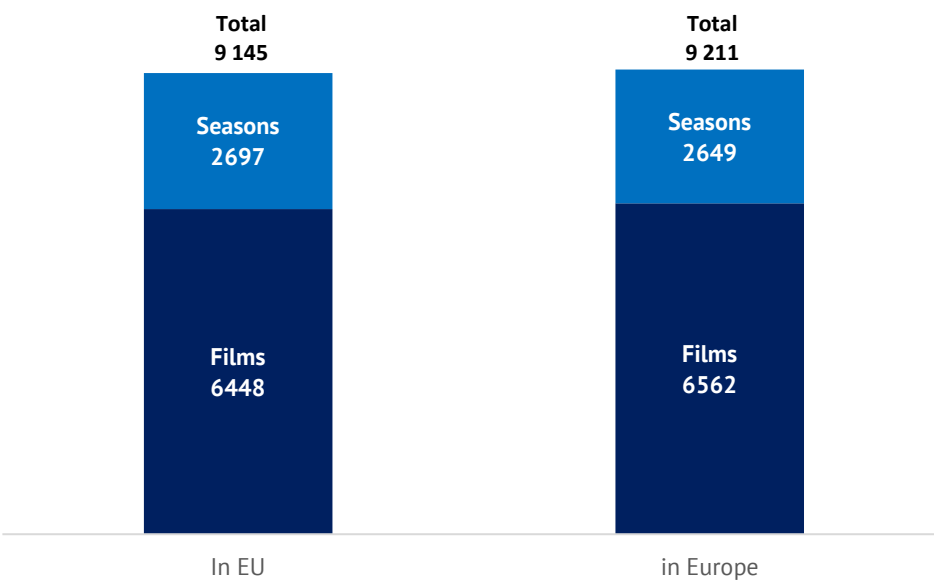


Source: European Audiovisual Observatory analysis of Metaprofile data

At country level, and only in 2022, about 6 500 different films and 2 700 TV show seasons were available, including about 2 300 European films and 1 300 TV show seasons.

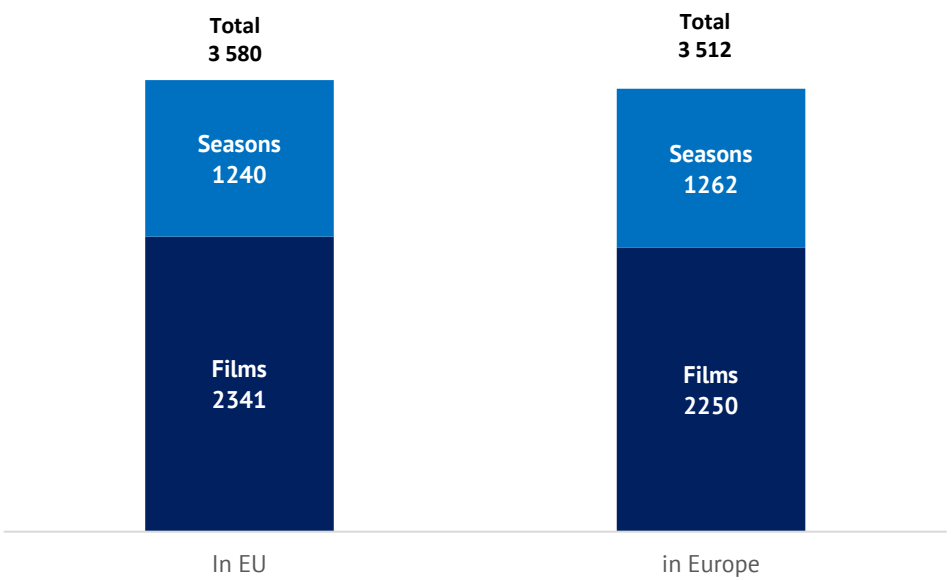
These figures should be seen as a minimum, as only national TV channels were considered, but viewers also access non-national channels. To reduce the corresponding distortion, certain countries where non-national TV channels in the same language play an important role (e.g. AT, IE, BE) have been excluded when calculating the average.

Average number per country of different films and series available on TV (2022)



Source: European Audiovisual Observatory analysis of Metaprofile data

Average number per country of different European films and series available on TV (2022)



Source: European Audiovisual Observatory analysis of Metaprofile data

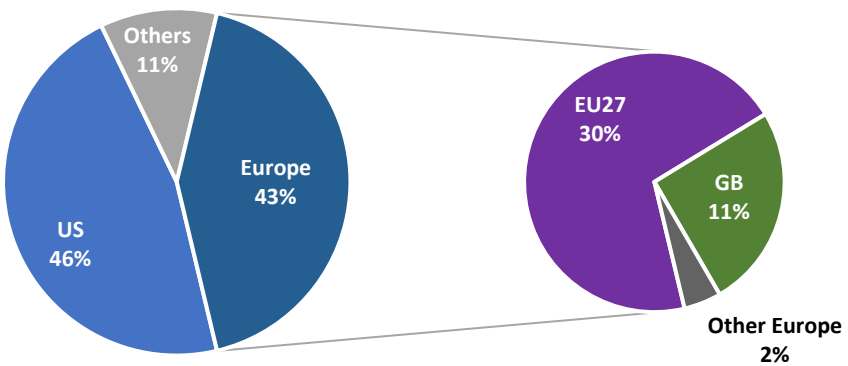
Origin of works in exploitation in 2022

European works accounted for 43% of works broadcast in the EU in 2022, almost on a par with US works (46%). Among European works, EU27 works accounted for 30% and other European works for 13%.

Figures were similar when considering not only EU countries but wider Europe.

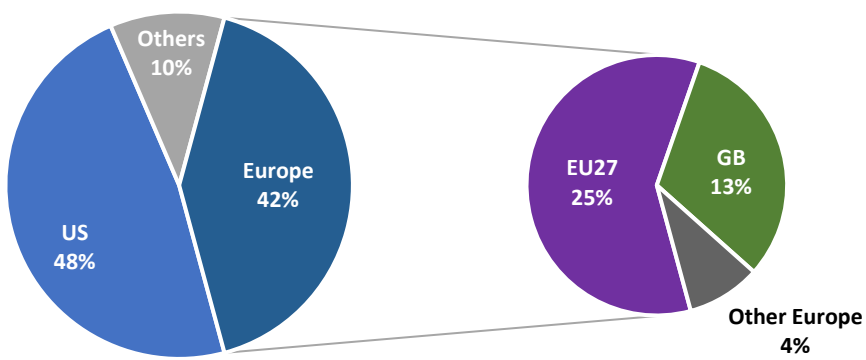
⚠ *Reminder: Shares are calculated on the basis of the number of titles and not their duration and therefore do not match the AVMSD criteria for assessment of quotas.*

Origin of films and seasons in the EU (2022)



Source: European Audiovisual Observatory analysis of Metaprofile data

Origin of films and seasons in Europe (2022)

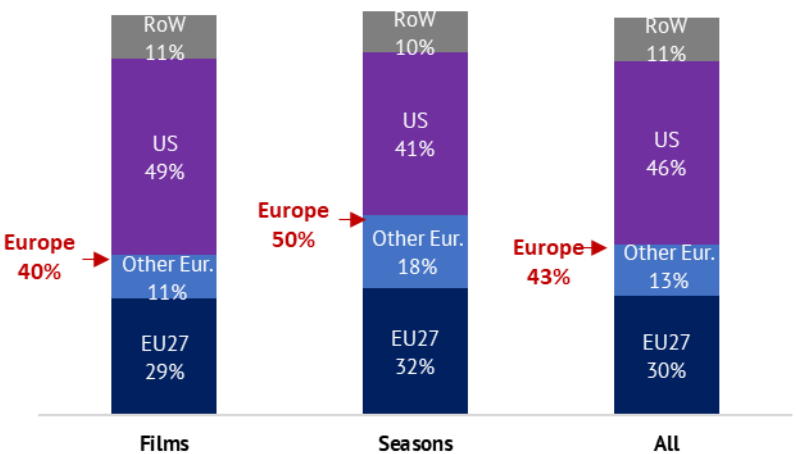


Source: European Audiovisual Observatory analysis of Metaprofile data

Be it in the EU or in wider Europe, the share of European works was higher for TV shows (measured in number of seasons) than for films.

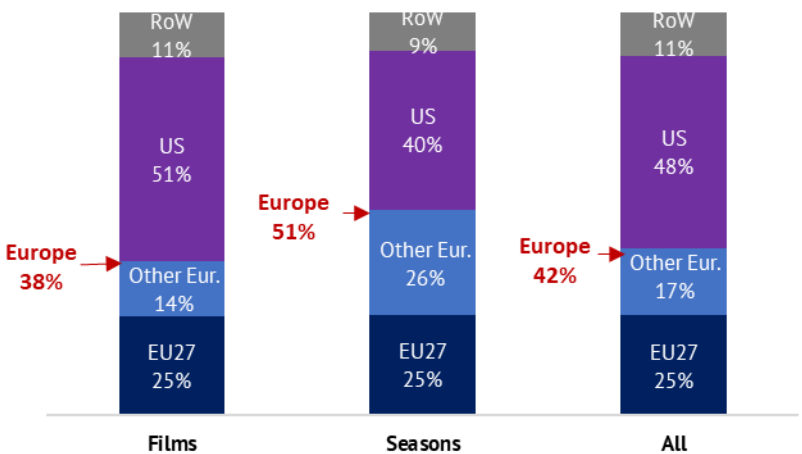
The higher share for TV shows was driven primarily by TV shows produced by the UK, but also by a higher share for EU27 TV shows distributed within the EU.

Origin of films and seasons broadcast in the EU – Films vs. seasons (2022)



Source: European Audiovisual Observatory analysis of Metaprofile data

Origin of films and seasons broadcast in Europe – Films vs. seasons (2022)

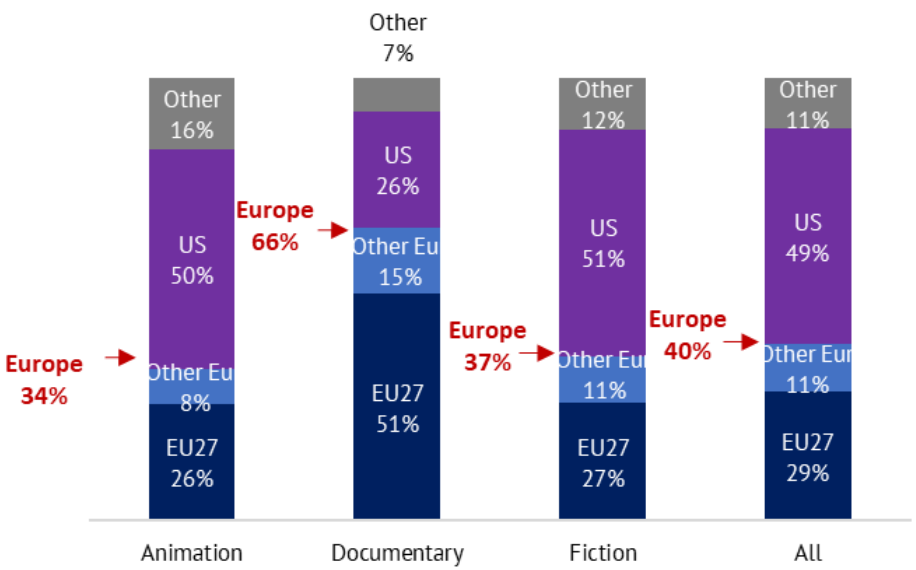


Source: European Audiovisual Observatory analysis of Metaprofile data

Both in the EU and in wider Europe, the share of European films tended to be higher than on average for documentaries and lower for animation.

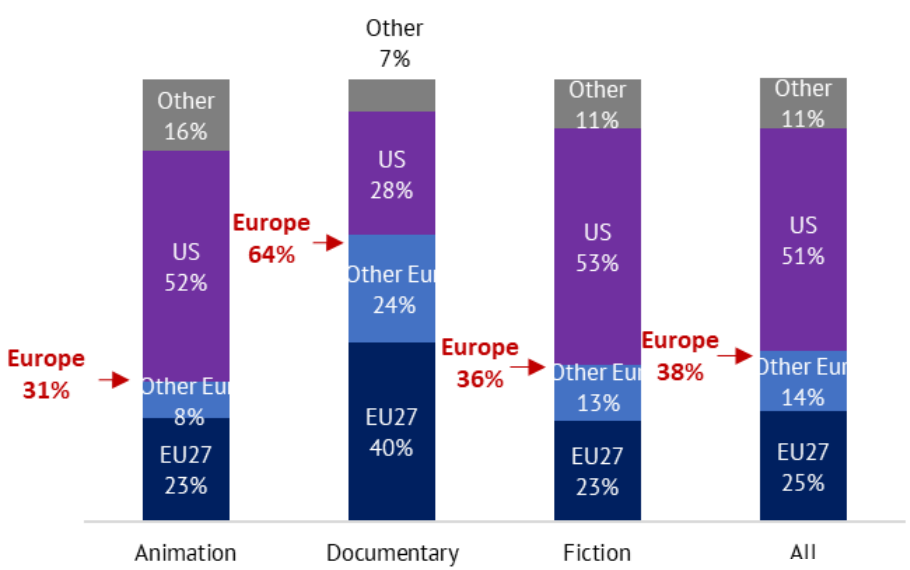
The appetite of viewers for documentaries more grounded in European culture could explain this higher share.

Origin of films broadcast in the EU – by genre (2022)



Source: European Audiovisual Observatory analysis of Metaprofile data

Origin of films broadcast in Europe – by genre (2022)

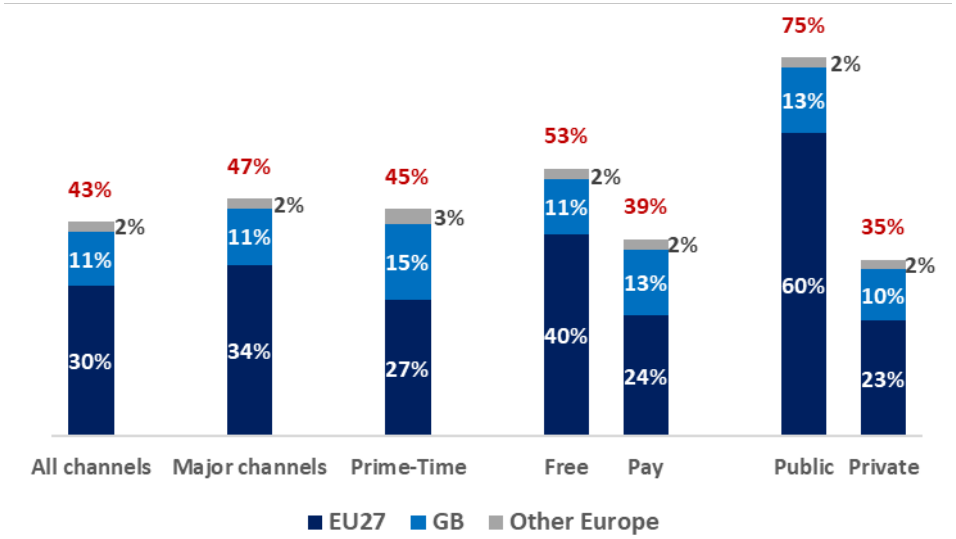


Source: European Audiovisual Observatory analysis of Metaprofile data

Both in the EU and in wider Europe, the share of European works (both films and TV shows) tended to be higher for major channels (with a 1% or more audience share), for free channels and for public channels.

⚠ *Reminder: shares are calculated on the basis of the number of titles and not their duration and therefore do not match the AVMSD criteria for assessing quotas.*

Share of European works broadcast in the EU – by channel category (2022)



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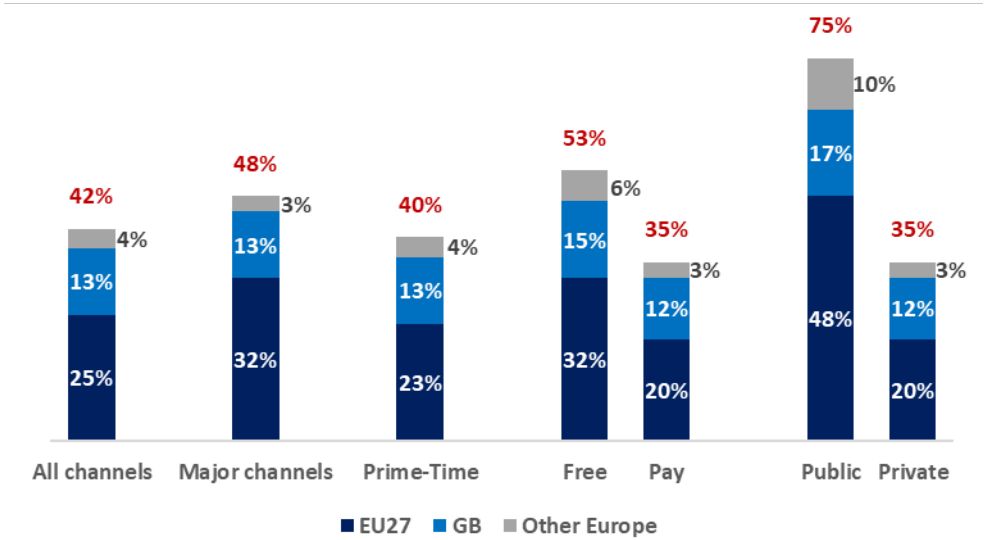
Share of European works broadcast in Europe – by channel category (2022)



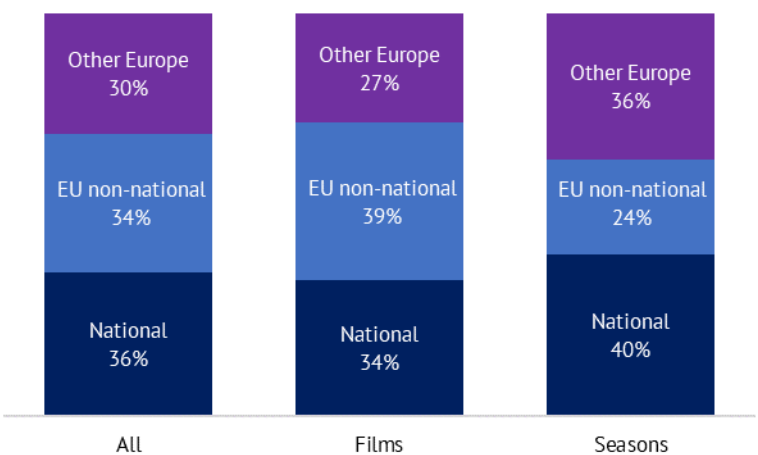
Source: European Audiovisual Observatory analysis of Metaprofile data

National vs. European non-national works

Both in the EU and in wider Europe, a clear majority of European works were non-national works.

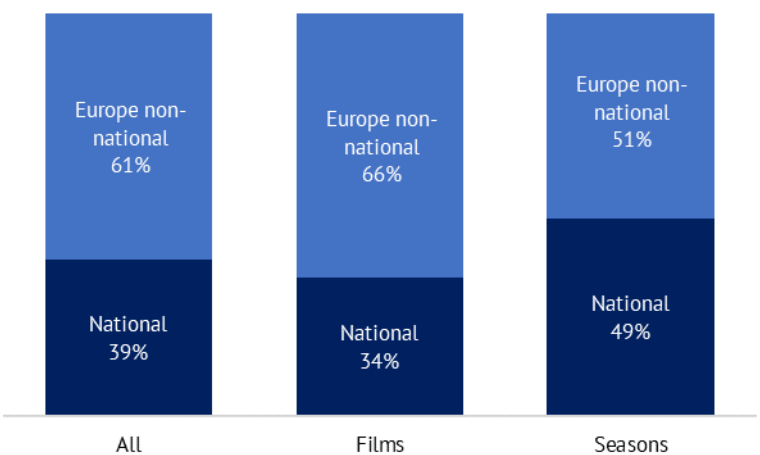
In the EU, non-national works were produced almost at par in other EU countries and in other non-EU European countries.

Breakdown of European works broadcast in the EU – national and non-national, by type of work (2022)



Source: European Audiovisual Observatory analysis of Metaprofile data

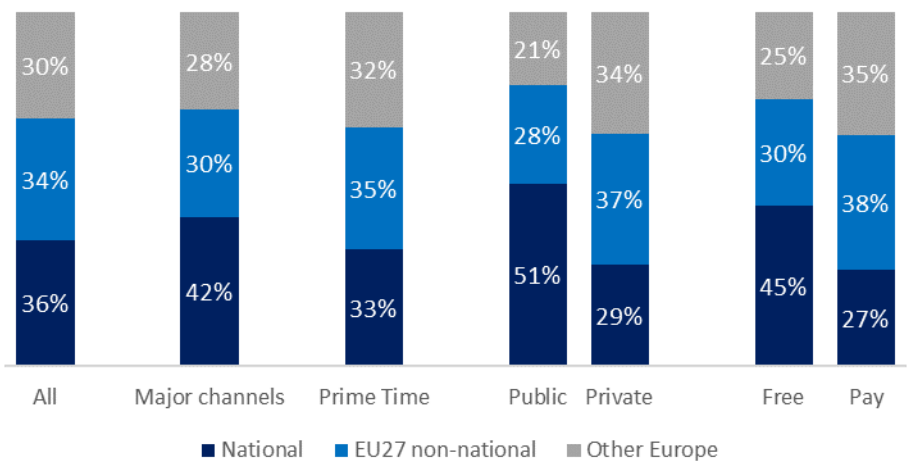
Share of European works broadcast in Europe – national and non-national, by type of work (2022)



Source: European Audiovisual Observatory analysis of Metaprofile data

Among European works, major TV channels (with a 1% or more audience share), public TV channels and free TV channels tended to favour national works, whereas other TV channels relied proportionally more on European non-national works, either produced in the EU or in another non-EU European country.

Breakdown of European works broadcast in the EU – national and non-national, by channel category (2022)



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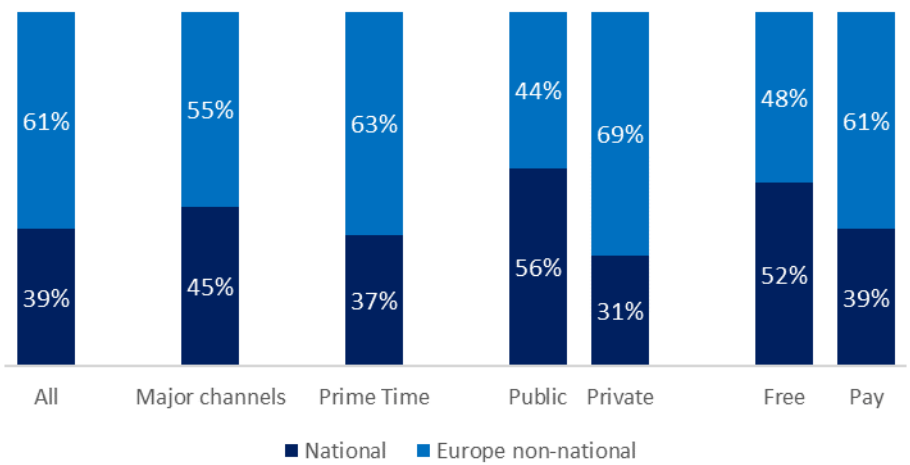
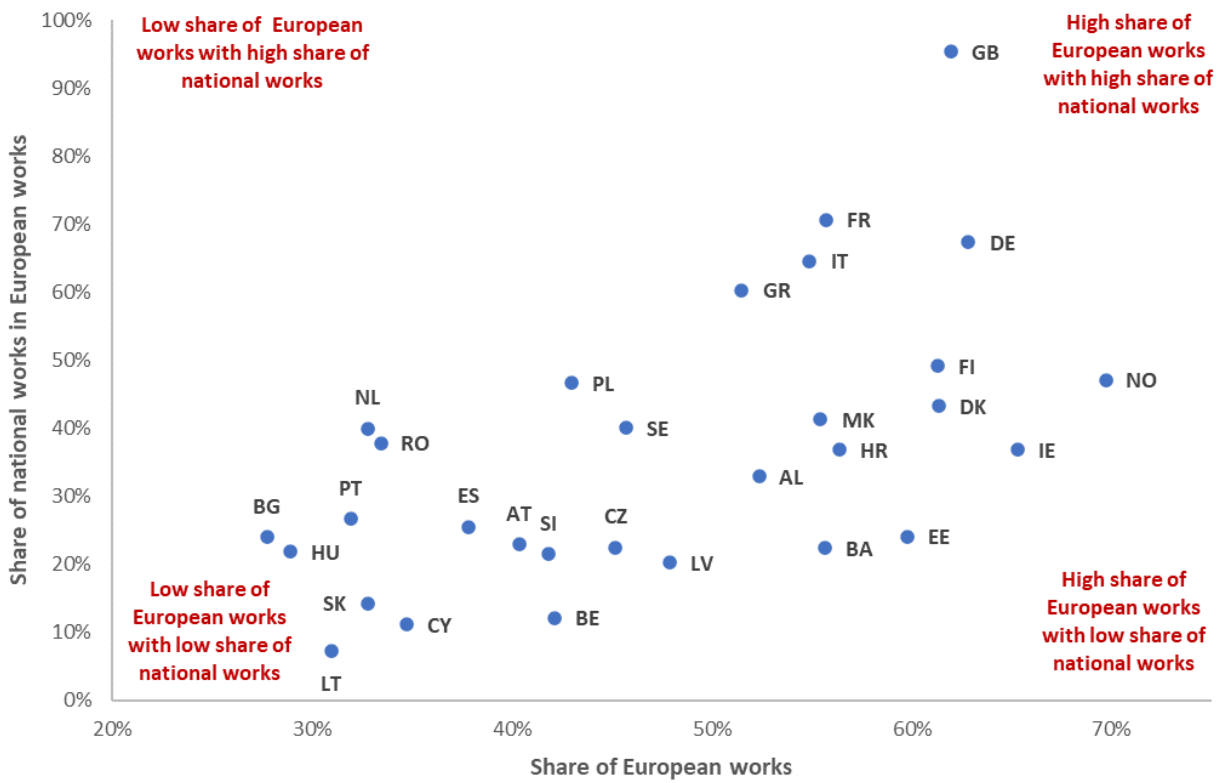


Source: European Audiovisual Observatory analysis of Metaprofile data

A mapping of the share of national works among all European works shows strong contrasts between countries. High-production countries had a higher-than-average share of national works among European works, except for Spain, possibly due to the importance of the sourcing of Latin America content.

In most other countries, European non-national works were key to the level of European works, whatever this level was.

Share of European works and share of national works in European works broadcast in Europe by country – major channels (2022)



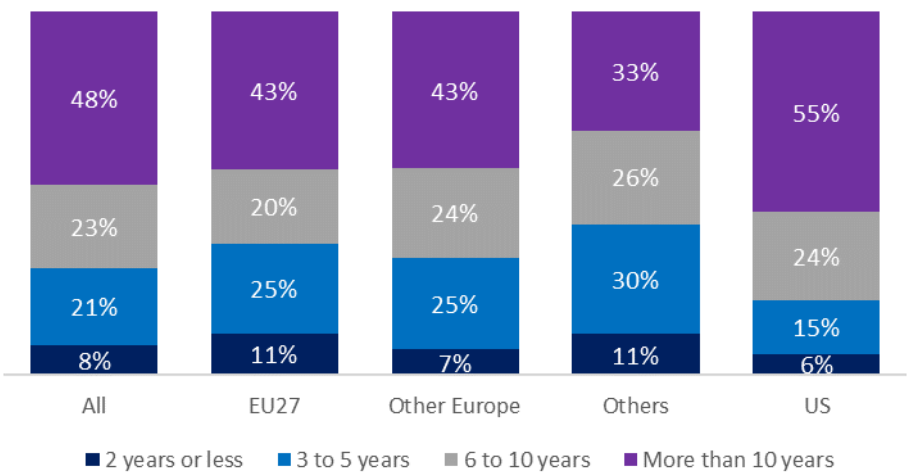
Source: European Audiovisual Observatory analysis of Metaprofile data

Age of works

Films aged 10 years or less accounted for 52% and 56% of all films broadcast in the EU and in wider Europe, respectively.

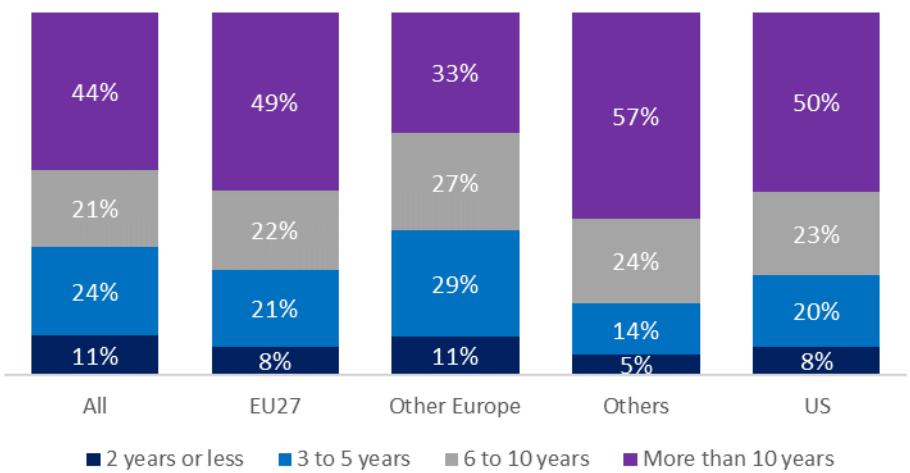
US films broadcast were slightly older than films produced in the EU or in another European non-EU country.

Breakdown of European films broadcast in the EU – by age and origin (2022)



Source: European Audiovisual Observatory analysis of Metaprofile data

Share of European works broadcast in Europe – by age and origin (2022)



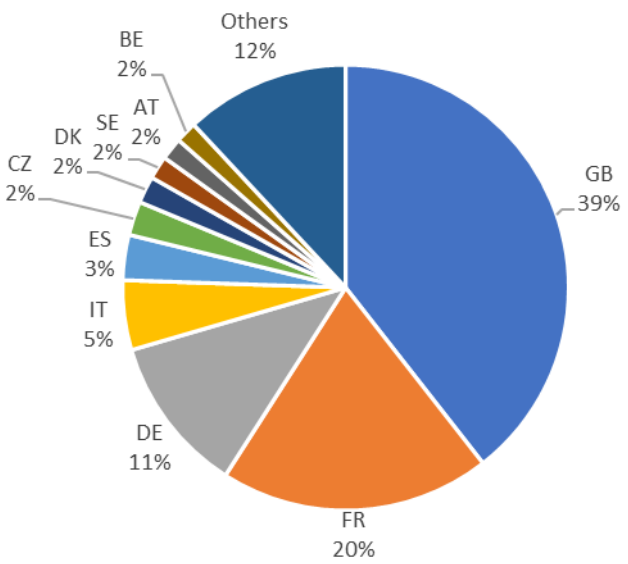
Source: European Audiovisual Observatory analysis of Metaprofile data

Exporters of European works

The five largest countries in Europe were also the main exporters of European works both in the EU and in wider Europe.

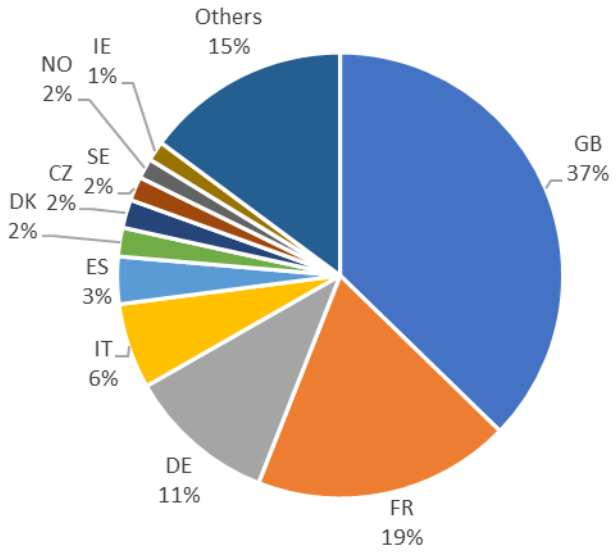
The United Kingdom was by far the leading exporter of European works both in the EU and in wider Europe.

Breakdown of European work exports in EU – by origin (2022)



Source: European Audiovisual Observatory analysis of Metaprofile data

Share of European work exports in Europe – by origin (2022)

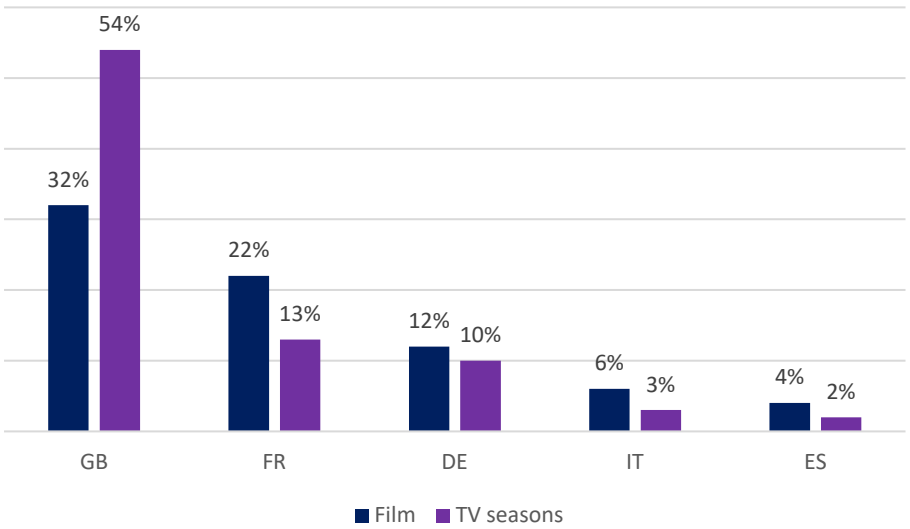


Source: European Audiovisual Observatory analysis of Metaprofile data

Breaking down the share of exports by type of work shows that, among the top five exporters, the United Kingdom was particularly strong in TV shows.

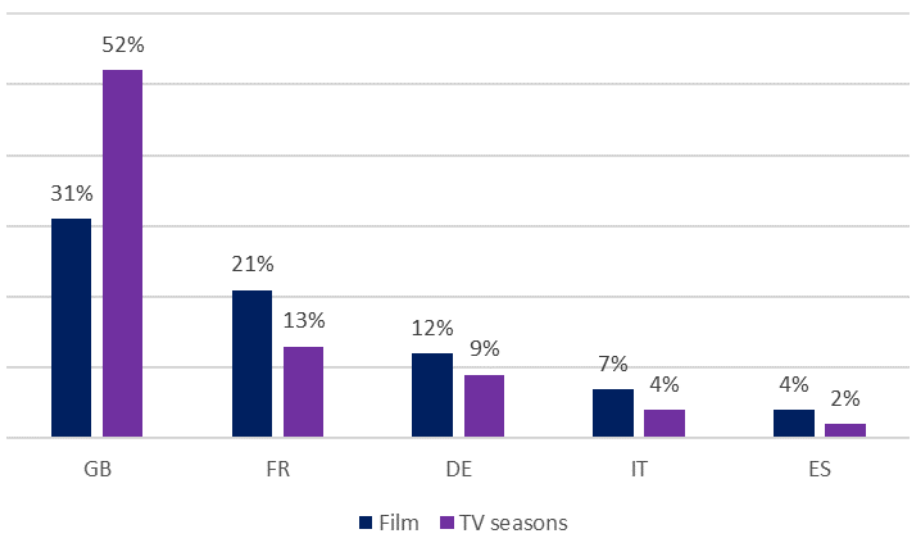
In all four other countries, the share of exports was lower for TV shows than for films.

Top 5 exporters in the EU – share of total exports for film and for TV seasons (2022)



Source: European Audiovisual Observatory analysis of Metaprofile data

Top 5 exporters in Europe – share of total exports for film and for TV seasons (2022)



Source: European Audiovisual Observatory analysis of Metaprofile data

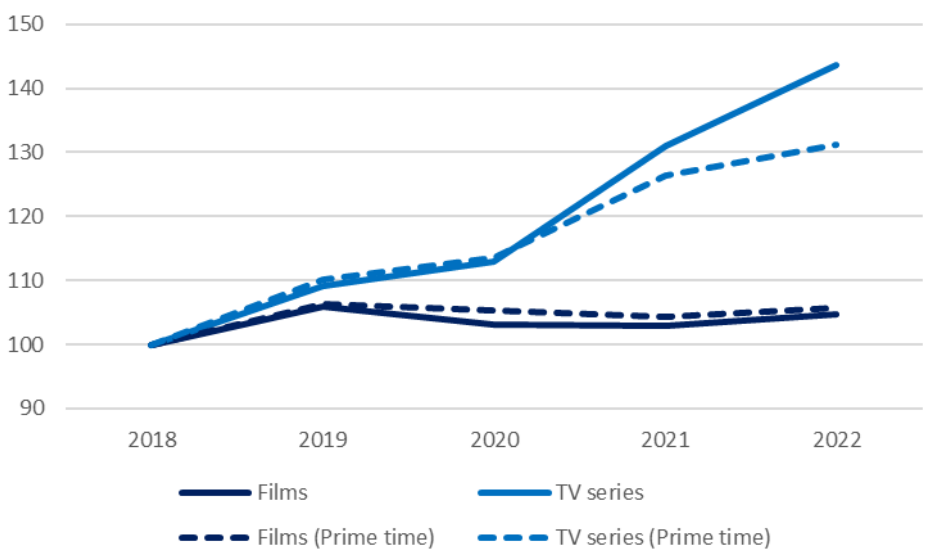
Evolution 2018-2022

Sample: 555 TV channels

European Audiovisual Observatory

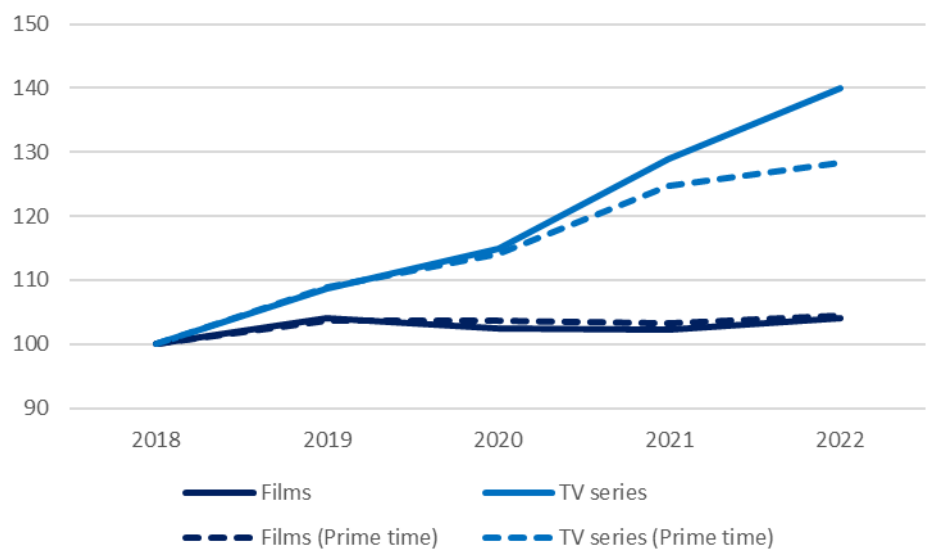
The number of films and TV shows (as defined in this report) increased between 2018 and 2022, implying that other categories of TV shows (including sports, news, talk shows, game shows, etc.) decreased. The growth was essentially driven by TV shows and applies both to the full programming and the prime-time programming of TV channels.

Number of works broadcast in the EU – by type (base 100 = 2018)



Source: European Audiovisual Observatory analysis of Metaprofile data

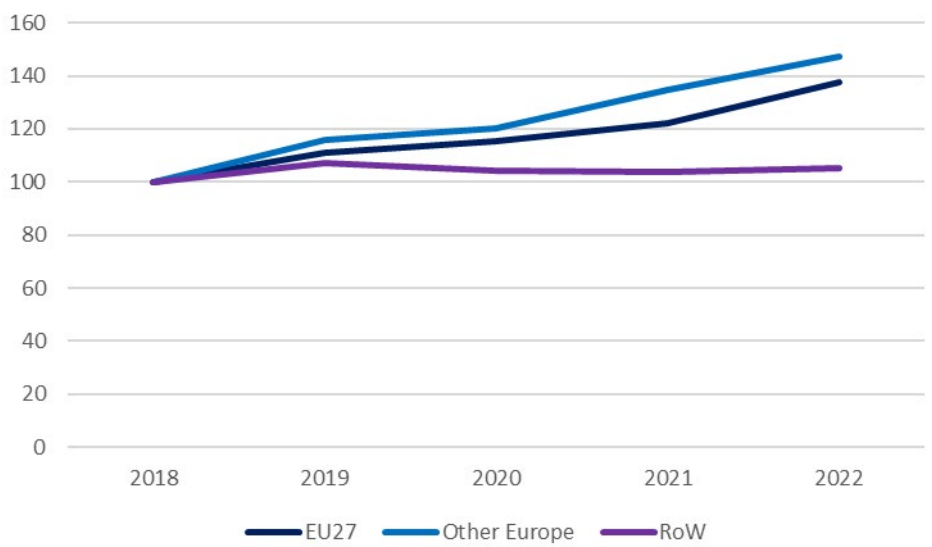
Number of works broadcast in Europe – by type (base 100 = 2018)



Source: European Audiovisual Observatory analysis of Metaprofile data

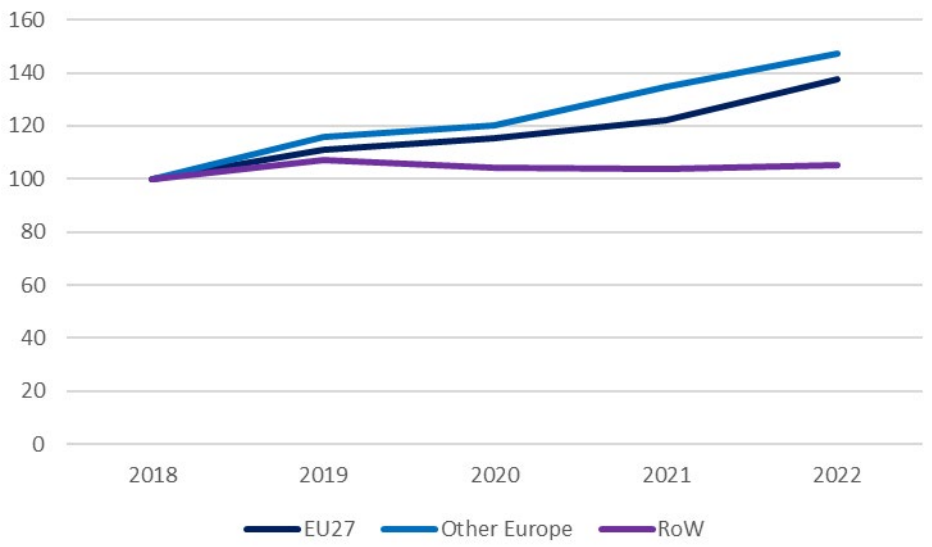
The number and hence share of EU27 and other European works increased between 2018 and 2022, both in the EU and in wider Europe, at the expense of US works.

Number of works broadcast in the EU – by origin (base 100 = 2018)



Source: European Audiovisual Observatory analysis of Metaprofile data

Number of works broadcast in Europe – by origin (base 100 = 2018)

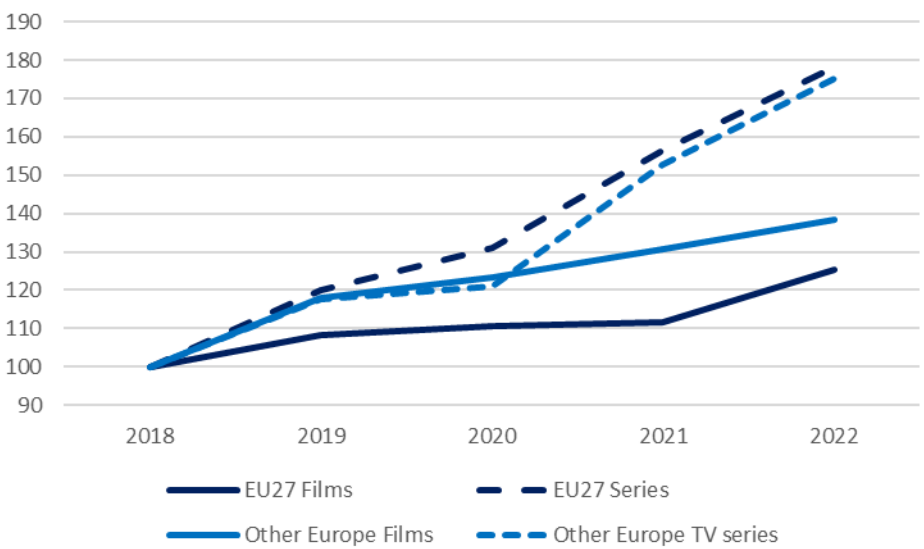


Source: European Audiovisual Observatory analysis of Metaprofile data

In the EU, TV seasons, both from the EU27 and other non-EU European countries, drove the growth in the number of European works broadcast.

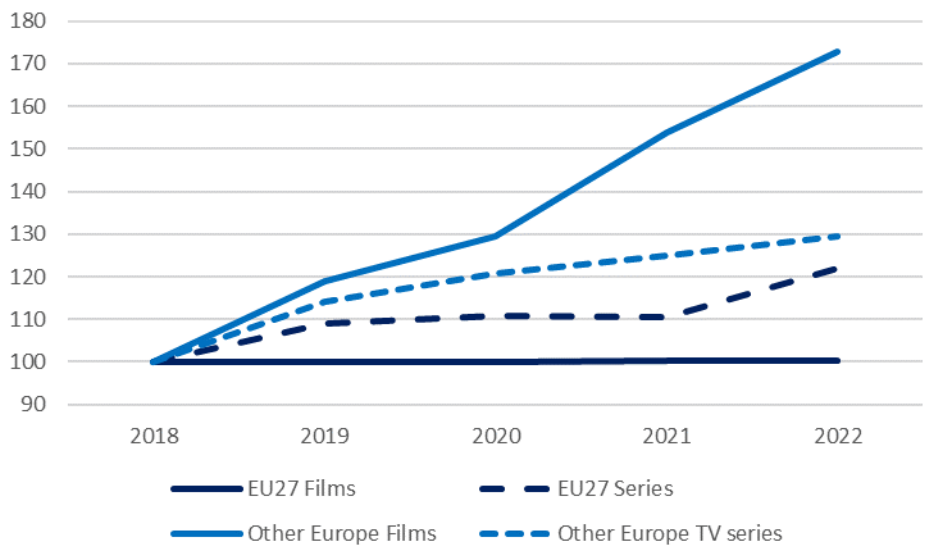
In wider Europe, non-EU27 European films were the main growth driver for European works. The number of EU27 films stagnated.

Number of European works broadcast in the EU – by type and origin (base 100 = 2018)



Source: European Audiovisual Observatory analysis of Metaprofile data

Number of European works broadcast in Europe – by type and origin (base 100 = 2018)

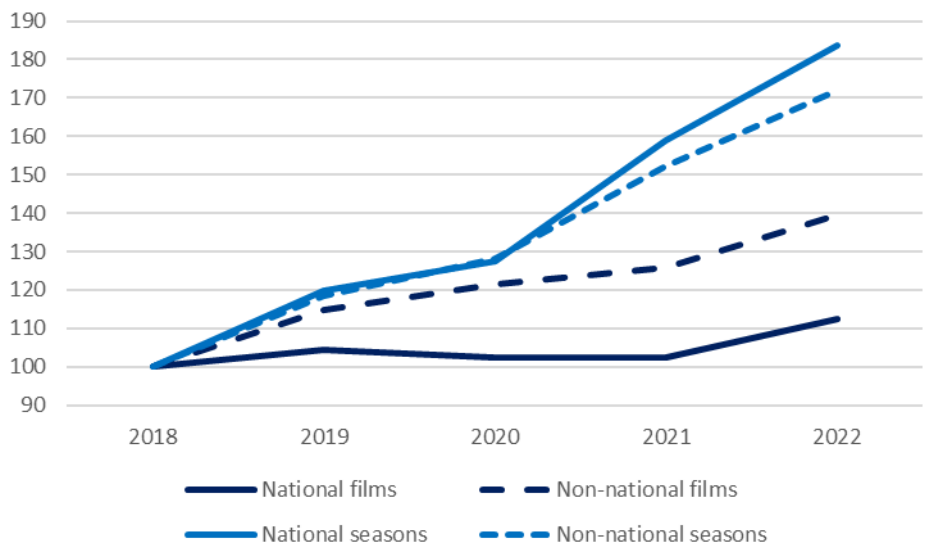


Source: European Audiovisual Observatory analysis of Metaprofile data

In the EU, the growth of European works broadcast on TV was driven more by national than non-national TV shows and more by non-national than national films.

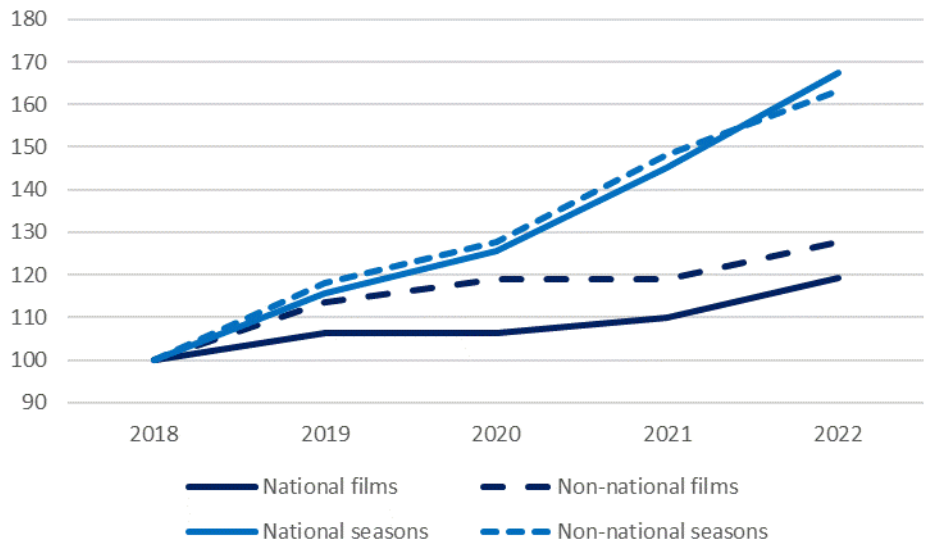
In wider Europe, national and non-national works contributed almost at par to the growth of the share of TV shows, whereas non-national films contributed more to the growth than national films.

Number of European works broadcast in the EU – national vs. non-national, by type (base 100 = 2018)



Source: European Audiovisual Observatory analysis of Metaprofile data

Number of European works broadcast in Europe – national vs. non-national, by type (base 100 = 2018)



Source: European Audiovisual Observatory analysis of Metaprofile data

More information:

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