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## 02 film and fiction productions on television

The number of films broadcast on television rose in 2006 (+1.6%). However, this increase concealed a considerable downturn in the offer during primetime on free terrestrial channels, which hit its lowest level since 1992. In 2006, taking all time slots into consideration, each viewer watched on average 57 hours of films (69 hours in 2005) and 259 hours of TV films (260 hours in 2005).



Louis la Brocante © France 3

Prison Break © Twentieth Century Fox Film Corporation



## 02 film and fiction productions on television

### CINEMA MOVIES ON TELEVISION

#### regulations

In compliance with the law of 30 September 1986 on freedom of communication, service publishers, other than cinema services and pay-per-view services, may broadcast no more than 192 feature-length films each civil year. That figure may not exceed 144 when all or part of the broadcast takes place between 8.30 p.m. and 10.30 p.m. These services are also authorised to broadcast 52 additional Art-house films (these films are excluded from the count if they are broadcast during primetime).

|      | TF1 | France 2 | France 3 | Arte | France 5 | M6  | total | Canal+ |
|------|-----|----------|----------|------|----------|-----|-------|--------|
| 1997 | 190 | 197      | 194      | 258  | 44       | 190 | 1.073 | 434    |
| 1998 | 190 | 201      | 207      | 270  | 51       | 190 | 1.109 | 448    |
| 1999 | 192 | 197      | 215      | 265  | 52       | 185 | 1.106 | 452    |
| 2000 | 192 | 154      | 201      | 256  | 51       | 175 | 1.029 | 460    |
| 2001 | 190 | 163      | 203      | 285  | 8        | 161 | 1.010 | 446    |
| 2002 | 191 | 143      | 206      | 263  | 10       | 159 | 972   | 406    |
| 2003 | 191 | 158      | 209      | 266  | 8        | 170 | 1.002 | 400    |
| 2004 | 189 | 164      | 244      | 258  | 11       | 165 | 1.031 | 436    |
| 2005 | 191 | 158      | 237      | 271  | 1        | 173 | 1.031 | 436    |
| 2006 | 183 | 154      | 230      | 315  | 4        | 141 | 1.027 | 463    |

#### → FILMS BROADCAST ON TELEVISION

source: CNC-CSA



|      | French films |      | American films |      | European films |      | other movies |     | total |
|------|--------------|------|----------------|------|----------------|------|--------------|-----|-------|
|      | number       | %    | number         | %    | number         | %    | number       | %   |       |
| 1997 | 369          | 47.9 | 289            | 37.5 | 105            | 13.6 | 8            | 1.0 | 771   |
| 1998 | 385          | 48.9 | 285            | 36.2 | 105            | 13.3 | 13           | 1.6 | 788   |
| 1999 | 384          | 48.7 | 268            | 34.0 | 127            | 16.1 | 10           | 1.3 | 789   |
| 2000 | 361          | 50.0 | 251            | 34.8 | 102            | 14.1 | 8            | 1.1 | 722   |
| 2001 | 350          | 48.8 | 256            | 35.7 | 101            | 14.1 | 10           | 1.4 | 717   |
| 2002 | 347          | 49.6 | 257            | 36.8 | 92             | 13.2 | 3            | 0.4 | 699   |
| 2003 | 363          | 49.9 | 261            | 35.9 | 95             | 13.0 | 9            | 1.2 | 728   |
| 2004 | 411          | 53.9 | 260            | 34.1 | 86             | 11.3 | 5            | 0.7 | 762   |
| 2005 | 396          | 52.2 | 258            | 34.0 | 98             | 12.9 | 7            | 0.9 | 759   |
| 2006 | 362          | 51.1 | 244            | 34.5 | 97             | 13.7 | 5            | 0.7 | 708   |

#### → BREAKDOWN BY NATIONALITY OF FILMS BROADCAST ON TF1, FRANCE 2, FRANCE 3 AND M6

source: CNC-CSA



been on the downturn for the previous two years, the figures for French films broadcast on these channels in 2004 and 2005 being 411 and 396 respectively. The number of American films was also down, to 244 films (258 in 2005), of which 25.8% were first runs (26.0% in 2005).

#### downturn of film offer during primetime

In 2006, the free channels (including Arte) broadcast 415 films during primetime, i.e. 29 fewer films than in 2005. The number of films in this slot reached its lowest level in ten years. The offer fell by 80 films compared with 1997, i.e. a drop of 16.2%, despite an increased offer on Arte (+69.0% for the same period). Between 1997 and 2006, the fall of the film offer during primetime came to 41.2% on TF1, 29.3% on France 2, 41.4% on France 3 and 38.2% on M6. Up until 2000, **TF1** had broadcast a stable number of films during primetime, of between 102 and 104 films. Since 2001, this number has decreased every year to total 60 films in 2006, the lowest level for ten years. After a break in the contraction of the offer in 2005, TF1 reduced the number of film slots during primetime in 2006. The offer was particularly reduced during the Sunday evening slot (34 films in 2006, versus 50 in 2005). There were two main reasons for this: the replacement of the Sunday film during the last quarter of the year by an American series (*CSI: Crime Scene Investigation*) and the coverage of the football World Cup in the middle of 2006, which also affected the Tuesday slot. The latter only dropped by 3 films compared with 2005 (25 films in 2006). The number of first-run films broadcast by the channel during primetime continued the downward trend noted in 2005 (19 films in 2006, as against 26 films in 2005 and 30 in 2004), particularly with French films (9 films, as against 11 films in 2005). All in all, the total offer of French films on the channel remained stable (83 films in 2006, as against 82 in 2005) but fell back considerably during primetime (31 films in 2006, as against 39 films in 2005). 47 films were broadcast in the second part of the evening, the majority being American films (70.2%).

#### slight increase in the film offer on analogue terrestrial channels

The national analogue terrestrial channels broadcast 1,490 cinematographic works in 2006, 68.9% of which were only programmed by the free TV channels.

The number of films broadcast on television was up compared with 2005 (+23 films). After registering its lowest level of the decade in 2003, Canal+ began to increase its offer in 2004 by broadcasting 436 films, and in 2006 reached the highest level since it was created. Arte continued to swell its film offer and also registered a record year, with 315 films programmed in 2006.

On the other hand, the other channels reduced the number of films they broadcast (-32 films with M6, -8 films with TF1, -7 films with France 3 and -4 films with France 2).

A third of the films (336 films in 2006, versus 300 in 2005) broadcast by free channels were first runs, meaning that they were programmed for the first time in decoded form. This proportion was 85% with Canal+ (392 films in 2006), i.e. 47 films more than in 2005. Free channels programmed 134 first-run French films (120 films in 2005), i.e. 13.0% of the total decoded offer, and 83 first-run American films (79 in 2005). On the four major channels (TF1, France 2, France 3 and M6), 362 French films were shown, 26.0% of which were new releases (21.7% in 2005). This figure had

The primetime film offer on **France 2** again dropped in 2006, reaching its lowest level in ten years: 65 films, i.e. 3 fewer films than in 2005. This fallback mainly concerned the Sunday evening slot (12 films, versus 31 in 2005). In 2006, the series *Without a trace* was regularly programmed on Sunday evening. The Tuesday evening slot also dropped considerably to 29 films as against 37 in 2005, as the slot was increasingly dedicated to fiction films in several parts (*Petits meurtres en famille*, *Ange de feu*). 53.8% of the film offer on France 2 was French (-2 points) with almost a third being first runs (11 films). American films marked time (24 films, as against 26 in 2005). Three Italian and three British films completed the channel's primetime film programme.

Apart from Arte, France 2 became the biggest decoded film broadcaster during primetime, ahead of TF1 and France 3. The latter reduced its film offer considerably, with 20 titles fewer than in 2005 (58 as against 78) thus dropping to its lowest level of the decade, like TF1 and **France 3**. The channel still broadcast a majority of French films (53.4%), including a growing number of first runs (25.8%, as against 15.9% in 2005). Thursday evening established itself as the channel's only regular film date during primetime, with 51 of the 58 films broadcast (versus 53 of the 78 films broadcast in 2005). Since 1999, the Monday evening film slot has been gradually replaced by other programmes and in 2006 particularly by documentaries. Only 2 films were broadcast at this time in 2006, as against 20 in 2005 and 45 in 1999. The film offer in the second part of the evening was cut by half (32 films in 2006, 63 in 2005) but offered 81.2% of French films. The number of films broadcast during the day reached its highest level in 2006, with 89 films (42 films in 2005).

With 63 films during primetime (5 titles less than in 2005), **M6** became the second biggest broadcaster of films at this time (apart from Arte). The channel did not change its film programming. With 48 films broadcast, Monday evenings remained almost exclusively dedicated to films, the differential in relation to 2005 (-5 films) being explained by the channel's broadcasting a number of matches from the football World Cup. Reality TV programmes such as *La Nouvelle Star* or series like *Prison Break* now almost always

occupied Thursday evenings, although a few films were still programmed in this slot during the summer. With 26 titles, French films represented 41.3% of M6's primetime film offer (31 titles and 45.6% in 2005), including a greater number of first runs (6 titles, as against 4 in 2005). American films made up the same proportion of the primetime offer with 25 films broadcast, a third of which were first runs. Film offers for the second and third part of the evening fell to 63 films in 2006 (87 films in 2005).

**Arte** had three dedicated film slots: Monday, Thursday and Sunday. It broadcast 169 films during primetime (152 films in 2005) and a total of 315 films in 2006 (271 films in 2005). French films represented 31.3% of the primetime offer, American films 36.7% and European films 28.4%. 31.9% of these films were first runs (29.6% in 2005). The channel thus confirmed its position as the leading free terrestrial channel for films, in terms of both volume and diversity. It gave European cinema its largest share on television with 111 films broadcast in 2006.

|      | TF1 | France 2 | France 3 | Arte | M6  | total |
|------|-----|----------|----------|------|-----|-------|
| 1997 | 102 | 92       | 99       | 100  | 102 | 495   |
| 1998 | 103 | 89       | 97       | 117  | 101 | 507   |
| 1999 | 103 | 78       | 96       | 121  | 96  | 494   |
| 2000 | 103 | 76       | 86       | 121  | 75  | 461   |
| 2001 | 99  | 79       | 82       | 133  | 76  | 469   |
| 2002 | 96  | 74       | 85       | 156  | 68  | 479   |
| 2003 | 85  | 75       | 77       | 156  | 68  | 461   |
| 2004 | 75  | 73       | 74       | 150  | 64  | 436   |
| 2005 | 78  | 68       | 78       | 152  | 68  | 444   |
| 2006 | 60  | 65       | 58       | 169  | 63  | 415   |

→ NUMBER OF FILMS BROADCAST DURING PRIMETIME\*

\*between 8.30 pm and 10.30 pm.  
source: CNC-CSA

|      | TF1 | France 2 | France 3 | Arte | M6 | total |
|------|-----|----------|----------|------|----|-------|
| 1997 | 58  | 45       | 51       | 40   | 42 | 236   |
| 1998 | 56  | 50       | 45       | 53   | 42 | 246   |
| 1999 | 56  | 41       | 51       | 48   | 42 | 238   |
| 2000 | 54  | 40       | 47       | 51   | 34 | 226   |
| 2001 | 52  | 41       | 48       | 44   | 31 | 216   |
| 2002 | 47  | 40       | 46       | 64   | 33 | 230   |
| 2003 | 43  | 42       | 37       | 57   | 29 | 208   |
| 2004 | 43  | 37       | 46       | 41   | 28 | 195   |
| 2005 | 39  | 38       | 44       | 54   | 31 | 206   |
| 2006 | 31  | 35       | 31       | 53   | 26 | 176   |

→ NUMBER OF FRENCH FILMS BROADCAST DURING PRIMETIME\*

\*between 8.30 pm and 10.30 pm.  
source: CNC-CSA

|      | TF1 | France 2 | France 3 | Arte | M6 | total |
|------|-----|----------|----------|------|----|-------|
| 1997 | 39  | 36       | 37       | 27   | 38 | 177   |
| 1998 | 40  | 33       | 38       | 26   | 38 | 175   |
| 1999 | 41  | 30       | 31       | 27   | 36 | 165   |
| 2000 | 41  | 30       | 31       | 34   | 27 | 163   |
| 2001 | 39  | 31       | 31       | 32   | 30 | 163   |
| 2002 | 38  | 29       | 34       | 39   | 26 | 166   |
| 2003 | 33  | 30       | 29       | 38   | 26 | 156   |
| 2004 | 30  | 29       | 25       | 57   | 23 | 164   |
| 2005 | 31  | 26       | 30       | 48   | 27 | 162   |
| 2006 | 23  | 24       | 23       | 62   | 25 | 157   |

→ NUMBER OF AMERICAN FILMS BROADCAST DURING PRIMETIME\*

\*between 8.30 pm and 10.30 pm.  
source: CNC-CSA

## 02 film and fiction productions on television

|          | films | French films | American films | broadcast | primetime broadcast |
|----------|-------|--------------|----------------|-----------|---------------------|
| Direct 8 | 95    | 51           | 35             | 173       | 80                  |
| France 4 | 81    | 39           | 23             | 140       | 70                  |
| LCP      | 3     | 1            | 2              | 7         | 3                   |
| NT1      | 118   | 47           | 61             | 148       | 138                 |
| TMC      | 115   | 48           | 56             | 192       | 132                 |
| W9       | 76    | 33           | 32             | 104       | 100                 |
| total    | 488   | 219          | 209            | 764       | 523                 |

### → NUMBER OF FILMS BROADCAST ON DTT CHANNELS IN 2006

Source: CNC-CSA

|          | 2005* | 2006 |
|----------|-------|------|
| Direct 8 | 132   | 173  |
| France 4 | 84    | 140  |
| LCP      | 4     | 7    |
| NRJ12    | 3     | 0    |
| NT1      | 87    | 148  |
| TMC      | 146   | 192  |
| W9       | 34    | 104  |
| total    | 490   | 764  |

### → NUMBER OF BROADCASTS OF FILMS ON DTT CHANNELS

\* Broadcasting started on 31 March 2005

Source: CNC-CSA

|       | purchases | including French films |
|-------|-----------|------------------------|
| 1997. | 608.3     | 328.4                  |
| 1998  | 678.7     | 366.5                  |
| 1999  | 710.6     | 372.9                  |
| 2000  | 761.6     | 391.6                  |
| 2001  | 811.0     | 421.3                  |
| 2002  | 767.5     | 392.5                  |
| 2003  | 804.6     | 388.1                  |
| 2004  | 833.7     | 423.2                  |
| 2005  | 826.1     | 453.6                  |
| 2006* | 800.6     | 379.7                  |

### → PURCHASES OF FILM BROADCASTING RIGHTS (€M)

\* estimates  
Source: CNC

## the cinema offer of free DTT channels

In 2006, six free DTT channels provided a film offer. All in all, they offered 488 films, entailing 764 broadcasts. 44.9% of these films were French and 42.8% were American. The primetime offer represented 523 broadcasts, i.e. 68.5% of all broadcasts. Direct 8, TMC and NT1 established themselves as the leading broadcasters of French films, each programming around 50 titles in 2006. Not many of these films were first runs (6.4% of 219 French films, 15.8% of all films). On France 4, the proportion of first runs was 32.1%. This channel seemed to foster the programming of decoded films that did not find a place in terrestrial channels' schedules. In 2006, for the first time, it broadcast decoded films such as Tony Gatlif's *Swing*, Paul Thomas Anderson's *Punch-Drunk Love* and Zhang Yimou's *Happy Times*. In 2006, the majority of DTT channels proposed regular film slots during primetime (at least 30 films broadcast in the same slot between 8.30 and 9.30 p.m.): W9 on Sundays and Thursdays, TMC on Mondays and Tuesdays, NT1 on Sundays, Mondays and Thursdays, and France 4 on Mondays.

Only 35.2% of films programmed by DTT channels were produced after 1995. On Direct 8 and TMC, this proportion came to 9.5% and 10.4% respectively. France 4, W9 and NT1, channels designed particularly for teenagers and young adults, offered a range of more recent films, and broadcast 64.2%, 52.6% and 49.2% respectively of films made after 1995. All DTT channels practised multibroadcasting. The channel that rebroadcast its films the most was Direct 8 (1.82 times on average). In contrast, NT1, which provided the broadest DTT offer with 118 titles, was the channel that rebroadcast the least (1.25 times on average).

## €801 M dedicated to film purchases

The purchase price for films varied from €0.03 M to €7.0 M, depending on the channel and broadcasting time. It also depended on cinema admissions with films being broadcast for the first time on television, and on the audience results for previous broadcasts with the others. With recent French films, the average purchase price varied between €0.30 M and €3.00 M for TF1 and M6, and between €0.06 M and €7.00 M for film channels like Canal+ and TPS Star. It laid between €0.13 M and €2.0 M for France 2 and France 3, and between €0.10 M and €0.15 M for Arte. Pre-purchases of recent French films for pay-per-session services were between €10,000 and €50,000 per film. In 2006, television channels spent €800.6 M in purchases and pre-purchases of film broadcasting rights. The amount for purchases of French films was assessed at €379.7 M (-16.3% compared with 2005), including €233.1 M for pre-purchases relative to production obligations. The overall amount for the purchases of film broadcasting rights was down by 3.1% in 2006, due to the disappearance of a number of film slots and a reduction in the number of films seen for the first time on TV in prime time on the historical analogue channels.

## THE AUDIENCE FOR FILMS AND FICTION PROGRAMMES ON TELEVISION

### three hours and 24 minutes of television viewing per day

According to Médiamétrie, the French watched television for an average of 3 hrs 24 mins each day in 2006, as in 2004, i.e. two minutes less than in 2005. People receiving a broader offer of channels watched more television (3 hrs 27 mins). The greatest consumers remained the 35-59 age bracket, with 3 hrs 33 mins per day (stable compared with 2005), versus 2 hrs 42 mins for 15-34 year-olds (2 hrs 48 mins in 2005) and 2 hrs 05 mins for 11-14 year-olds (2 hrs 14 mins in 2005).

By way of comparison, viewing times for each person in France were less than those observed in North America (4 hrs 10 mins in Canada, 4 hrs 31 mins in the United States) and in the principal European countries (3 hrs 32 mins in Germany, 3 hrs 36 mins in the UK, 3 hrs 37 mins in Spain and 3 hrs 59 mins in Italy).

On average, each television viewer watched 1,023 hours and 52 minutes of programmes on free terrestrial channels (TF1, France 2, France 3, M6, Arte and France 5) in 2006. 57 hours were devoted to films, i.e. 5.6% of individual television consumption (69 hours in 2005), 259 hours to television films, i.e. 25.3% (260 hours in 2005), and 63 hours to sport (43 hours in 2005).

### best terrestrial channel performance guaranteed by football, news, films and television films

**TF1** was once again dominant in the ratings for the 100 best audiences of the year, in which 98 of its programmes appeared (89 in 2005). Although down by 0.7 points compared with 2005, the channel still led in terms of audience, with a market share of 31.6% for individuals aged 4 and over. Football took up the top nine places for the best audiences, topped by the World Cup semi-final match between France and Portugal, and a record audience of 22.2 million television viewers (76.7% market share). Apart from televised news programmes and football matches, 27 programmes registered audiences of over 10 million

(18 in 2005). These included 20 television films or episodes in fiction series (including 16 from France), 6 films (including 4 from France) and an entertainment programme (*Le Village des Enfoirés*).

In second place, **France 2** audiences fell for the second year running and lost 0.6 points, totalling 19.2%.

The channel suffered particularly from the 2006 football World Cup. Despite the success of *The Chorus*, shown for the first time in decoded form on France 2, with 11.5 million viewers – its highest audience since 1995 (apart from Euro 2004) – fiction was the dominant genre in the channel's successes. *Without a trace* garnered the second highest audiences for the year (8.7 million viewers), followed by the French mystery series *David Nolande* (8.2 million) and *Petits meurtres en famille* (7.8 million). The showing of *Harry Potter and the Chamber of Secrets* attracted 7.5 million viewers.

After a downturn for three years running, **France 3** stabilised its audience share at 14.7%. The fiction series broadcast on the channel continued to appeal to audiences, topped by *Louis la brocante* – the top audiences for the year with 9.1 million viewers and no. 75 in the top 100 audiences for 2006, taking all channels together – and *Plus belle la vie*, a daily series broadcast in primetime access. The channel also gained from broadcasting the Turin Winter Olympics, where one of the skating competitions garnered 6.1 million viewers (4th biggest audience of the year). 4 films attracted more than 5 million viewers (5 in 2005). *The Old Gun*, broadcast in tribute to Philippe Noiret, obtained the best film result, with 6.8 million viewers (2nd biggest audience in 2006 for the channel).

The audiences for **M6** and France 5 fell back slightly (-0.1 point each) to total 12.5% and 6.8% respectively. M6 garnered its best results throughout the year with various American series – with, as a high point in the autumn, record performances for *Prison Break* and *NCIS* – and reality TV programmes like *La Nouvelle Star*. For the first time, the channel broadcast football World Cup matches with success, with the Brazil/Croatia match attracting 6.3 million viewers. 5 films topped the 5-million viewer mark (10 in 2005), including the *Back to the Future* trilogy.

## 02 film and fiction productions on television

|  | broadcast date | nationality    | audience (%) | market share (%) |
|--|----------------|----------------|--------------|------------------|
| <b>TF1</b>   |                |                |              |                  |
| Marie Besnard l'empoisonneuse / part 1                     | September 25   | France/Belgium | 20.7         | 46.1             |
| R.I.S. police scientifique / Un homme à la dérive , part 1 | January 26     | France         | 20.2         | 43.8             |
| Monsieur Léon  | November 27    | France         | 19.6         | 41.7             |
| Joseph   | January 2      | Belgium/France | 19.5         | 42.3             |
| Maldonne   | February 01    | France/Switz.  | 19.4         | 44.2             |
| <b>France 2</b>  |                |                |              |                  |
| Without a Trace  | May 28         | USA            | 15.5         | 35.6             |
| David Nolande/pilot episode                                | December 6     | France         | 14.6         | 30.9             |
| Petits Meurtres en famille/episode 1                       | November 14    | France         | 14.0         | 28.5             |
| Ange de feu / part 2                                       | January 24     | France         | 13.7         | 29.0             |
| Du goût et des couleurs                                    | April 12       | France         | 12.9         | 29.4             |
| <b>France 3</b>  |                |                |              |                  |
| Louis la Brocante / Louis et le mystère du viager          | January 10     | France         | 16.3         | 34.5             |
| Plus belle la vie  | February 14    | France         | 11.5         | 24.3             |
| SOS 18 / Saleté de gosses                                  | February 7     | France         | 10.8         | 22.8             |
| Les Courriers de la mort / part 2                          | March 5        | France         | 10.7         | 21.8             |
| Les Vauriens   | September 30   | France         | 10.3         | 27.2             |
| <b>Arte</b>  |                |                |              |                  |
| Cayenne les amants du baigne                               | August 25      | France         | 2.9          | 8.0              |
| Haute Coiffure   | March 10       | France         | 2.8          | 6.4              |
| Death on the Beach   | December 1     | Germany        | 2.6          | 5.9              |
| L'Enfant d'une autre                                       | June 16        | France         | 2.4          | 6.6              |
| Colomba  | July 07        | France         | 2.2          | 6.3              |
| <b>M6</b>  |                |                |              |                  |
| Prison Break / Manhunt                                     | November 09    | USA            | 13.4         | 30.7             |
| NCIS / Predator  | December 1     | USA            | 12.0         | 26.7             |
| Desperate Housewives / Come back to me                     | June 20        | USA            | 10.6         | 24.0             |
| Les Bleus premiers pas dans la police / pilot episode      | February 08    | France         | 9.3          | 20.8             |
| The 4400 / The Weight of the World                         | February 3     | USA            | 8.8          | 18.6             |

### → THE BEST TV FICTION AUDIENCES OF 2006\*

Audience: 1% = 560,600 viewers aged 4 and over.

\*repeated fiction programmes appear only once in this rating source: Médiamat – Médiamétrie, CNC

Although down, the audience share registered by **France 5** in 2006 was one of the best since its creation. As in 2005, its emblematic magazines achieved the best audiences (*C dans l'Air*, *Ripostes* and *Question maison*).

At 3.1% as against 3.4% in 2005, **Arte** registered one of its lowest audience shares since 2002.

The programming of feature films and documentaries always provided its best results: in the lead of its top five audiences were four films, including *White Fang*, the best audience of the year (2.3 million viewers), and a historical documentary, *Victoire dans le Pacifique* (2.2 million).

### fiction programmes: the rise in power of American series

2006 confirmed the success of American series during primetime, which represented 25% of the fiction offer on TF1, France 2, France 3 and M6. While these series have always constituted a linchpin in M6's programming (193 hours during primetime), they occupied slots normally dedicated to films on the other channels. TF1 and France 2 respectively devoted 69 hours and 58 hours to them in 2006 (as against 39 hours and 23 hours in 2005). Their success even inspired a number of French series (*R.I.S.* and *Section de Recherche* on TF1). However, despite everything, French fiction programmes were still the main leaders with audiences in the genre on all channels (apart from M6), and produced 47 of the top 100 audiences of the year, taking all programmes as a whole. Apart from the ever-popular flagship heroes (*Julie Lescaut*, *Une femme d'honneur*), television series based on historical events took the lead on TF1 with *Marie Besnard l'empoisonneuse* (11.3 million viewers on average) and *Monsieur Léon* (11.0 million). After *Without a Trace*, France 2 registered its best audiences with television mystery films in several parts, like *David Nolande* (8.2 million viewers for the pilot episode) and *Petits Meurtres en famille* (7.8 million for the first episode). *Louis la Brocante*, a solid investment in France 3's programming, gained the channel its best audience for the year. *Plus belle la vie* and *SOS 18* also established a firm place in the channel's good performance. Thanks to its broadcasts

of major American series (*Prison Break*, *Desperate Housewives*), M6 consolidated its audience results with fiction, and even registered its record for the year, taking all programmes into consideration, with two episodes of *Prison Break* (7.4 million viewers).

## French cinema holds its head high in a reduced offer context

The 100 top audiences for films were garnered, as in 2005, by an equal number of French and American films (46 films). However, more French films performed well than in 2005: the 20 best audiences included 13 French films (8 in 2005), and 8 films were even up among the 10 best audiences, including 2 first runs (*L'Enquête corse* and *The Chorus*).

In a context where the film offer on television contracted in 2006, the programming focused on a few non-first run key titles: 31 films had already been classified in the same category in 2004. This record thus included fewer first runs (34 films, versus 39 in 2005), though these contained a larger share of French films (50.0% versus 38.5% in 2005). Channels also fostered the “series” effect in their programming: out of the 100 films in this ranking, 28 formed part of a series of films, including 9 from France. This effect was particularly marked on TF1 and M6, which each included 4 series films in their top 5 best film audiences. In fact, the two first *Bronzés* films, broadcast on TF1, topped film audiences in 2006, taking all channels together. Each of these films registered over 12 million viewers, their broadcast coinciding with the cinema release of *Friends forever*.

|  | director       | broadcast date | nationality      | ranking | audience (%) | market share (%) |
|--|----------------|----------------|------------------|---------|--------------|------------------|
| <b>TF1</b>   |                |                |                  |         |              |                  |
| Les Bronzés font du ski                                | P. Leconte     | 31 January     | France           | 11      | 22.1         | 43.2             |
| Les Bronzés  | P. Leconte     | 14 March       | France           | 12      | 22.0         | 47.6             |
| Pirates of the Caribbean: the Curse of the Black Pearl | G. Verbinski   | 24 October     | USA              | 1       | 20.3         | 45.8             |
| L'Enquête corse  | A. Berberian   | 07 November    | France           | 1       | 19.5         | 43.1             |
| Asterix & Obélix: Mission Cleopatra                    | A. Chabat      | 14 November    | France           | 2       | 19.0         | 40.3             |
| <b>France 2</b>  |                |                |                  |         |              |                  |
| The Chorus   | C. Barratier   | 25 April       | France/Switz     | 1       | 20.5         | 42.7             |
| Harry Potter and the Chamber of Secrets                | C. Columbus    | 01 January     | USA              | 1       | 13.6         | 31.6             |
| After you  | P. Salvadori   | 09 May         | France           | 1       | 12.0         | 27.3             |
| Insomnia   | C. Nolan       | 15 January     | USA              | 1       | 11.9         | 25.3             |
| Mariages !   | V. Guignabodet | 06 November    | France           | 1       | 11.6         | 25.7             |
| <b>France 3</b>  |                |                |                  |         |              |                  |
| The Old Gun  | R. Enrico      | 26 November    | France / Germany | 12      | 12.1         | 24.8             |
| Malabar Princess                                       | G. Legrand     | 30 November    | France           | 1       | 10.2         | 21.8             |
| La Fleur du mal  | C. Chabrol     | 02 February    | France           | 1       | 9.8          | 21.8             |
| Blood Work   | C. Eastwood    | 09 February    | USA              | 1       | 9.6          | 21.6             |
| Le Triporteur  | J. Pinoteau    | 16 February    | France           | 6       | 8.7          | 18.8             |
| <b>Arte</b>  |                |                |                  |         |              |                  |
| White Fang   | R. Kleiser     | 05 November    | USA              | 4       | 4.2          | 8.8              |
| Espion lève-toi  | Y. Boisset     | 12 January     | France           | 10      | 3.9          | 8.6              |
| Sous le sable  | F. Ozon        | 13 November    | France           | 2       | 3.9          | 8.6              |
| Cool Hand Luke   | S. Rosenberg   | 12 November    | USA              | 5       | 3.7          | 8.1              |
| She Wore a Yellow Ribbon                               | J. Ford        | 16 October     | USA              | 10      | 3.6          | 7.9              |
| <b>M6</b>  |                |                |                  |         |              |                  |
| Back to the Future 2                                   | R. Zemeckis    | 24 April       | USA              | 5       | 9.6          | 21.9             |
| La Vérité si je mens 2                                 | T. Gilou       | 31 October     | France           | 2       | 9.2          | 22.7             |
| X Men 2  | B. Singer      | 22 May         | USA              | 1       | 9.2          | 21.4             |
| The Shawshank Redemption                               | F. Darabont    | 13 November    | USA              | 5       | 9.0          | 22.4             |
| Back to the Future 3                                   | R. Zemeckis    | 01 May         | USA              | 5       | 9.0          | 21.5             |

### → BEST FILM AUDIENCES IN 2006

audience: 1% = 560,600 viewers aged 4 and over  
source: Médiamat-Médiamétrie, CNC



## 02 film and fiction productions on television

### erosion of audiences for films during primetime

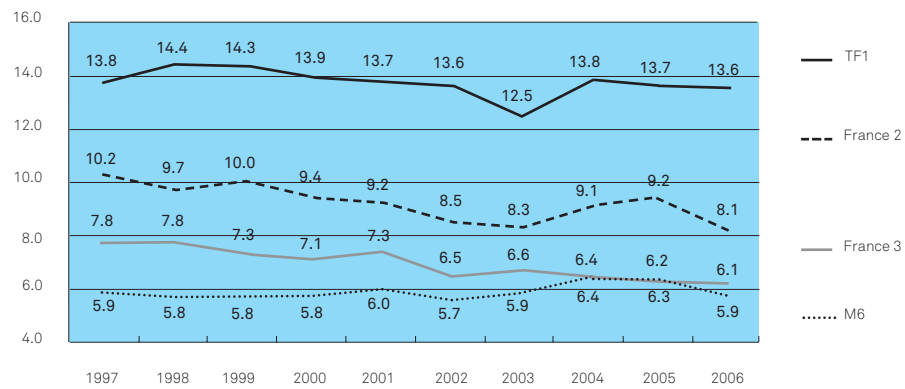
The average audience for films during primetime on terrestrial channels was down slightly with all channels (-0.1 points with TF1 and France 3, -0.4 points with M6). This trend was more marked with France 2 (-1.1 points), in line with the channel's general fall in audience share. Despite the success of *The Chorus*, the average audience for French films fell (-1.5 points), to a greater extent than for American films (-0.5 points). In the last four months of the year, the channel focused its Monday primetime film offer, and obtained a higher average audience than the annual average for films in this slot, with 8.5% of audience share. In contrast to France 2, TF1 increased its audiences for French films (+0.6 points). Here the channel registered one of the best levels since 1996 (13.7% in average audiences), for the first time drawing almost level with American films (13.8%). The gaps also narrowed for France 3 and M6: here audiences for French films rose (+0.5 points and +0.2 points respectively) while those for American films fell slightly (-0.6 points with France 3 and -1.3 points with M6).

In a context of increased competition with American series, films no longer offered an increased value performance during primetime. Only 13 films gained more than 35% of market share in 2006, versus 24 films in 2005.

### 16.50 million people now receiving cable and satellite channels

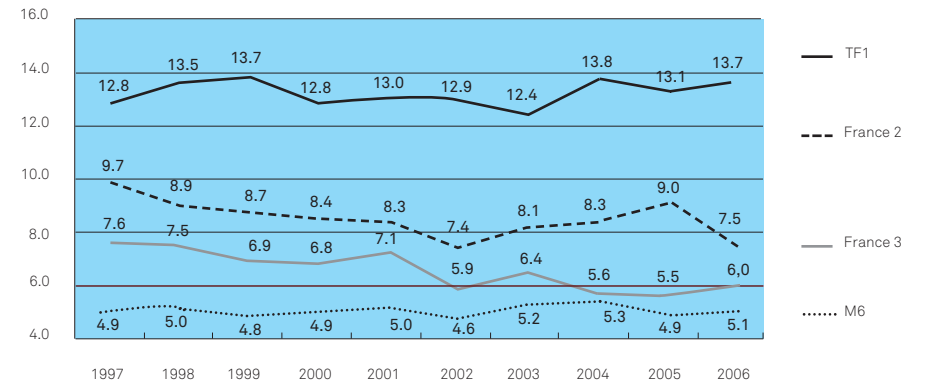
According to Médiamétrie, from September 2006 to February 2007, 16.50 million individuals aged 4 and over possessing a television set subscribed to a broader offer (15.75 million for the same period in 2005), i.e. 29.4% of TV households, and an increase of 4.8% in one year.

On 31 December 2006, 4.90 million households were satellite subscribers. CanalSat had 3.46 million subscribers (an increase of 272,000 over the previous year) and TPS, 1.44 million. The merger between the two multichannel packages began in 2006, becoming effective on 21 March 2007. In 2006, the cable market was also marked by the merger of UPC-Noos and Numéricable, the conclusion of the cable operator concentration process begun in 2004 with the rapprochement of Noos and UPC. This merger resulted in a single French cable operator, with 4.2 million subscribing to one television offer. The number of households able to be connected to cable networks was assessed at 9.5 million in 2006 (8.9 million in 2004 according to the AFORM's official figures). As regards television via ADSL, 1.7 million households were subscribed by the end of 2006. The number of households eligible for this service was assessed at 12 million. In contrast to cable and satellite, the market for IP television became more competitive in 2006 with the arrival of new players (Darty, then SFR in early 2007) in addition to the historical operators, i.e. Internet service providers.



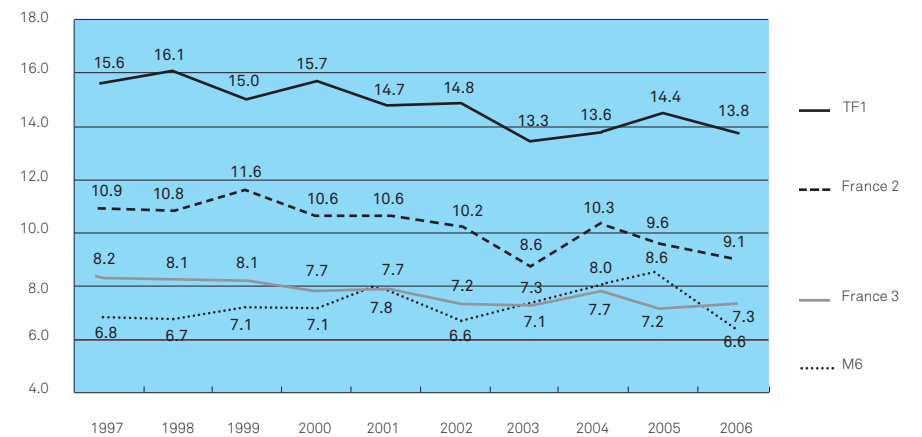
→ AVERAGE PRIMETIME FILM AUDIENCES (%)

source: CNC - CSA - Médiamétrie



→ AVERAGE PRIMETIME FRENCH FILM AUDIENCES (%)

source: CNC - CSA - Médiamétrie



→ AVERAGE PRIMETIME AMERICAN FILM AUDIENCES (%)

source: CNC - CSA - Médiamétrie



## 02 film and fiction productions on television

|                      | national terrestrial channels | theme channels | total |
|----------------------|-------------------------------|----------------|-------|
| 1998                 | 71.1                          | 28.9           | 100.0 |
| 1999                 | 69.0                          | 31.0           | 100.0 |
| Feb - July 2001      | 68.8                          | 31.2           | 100.0 |
| Sept 2001 - Feb 2002 | 68.0                          | 32.0           | 100.0 |
| Jan - June 2002      | 67.8                          | 32.2           | 100.0 |
| Sept 2002 - Feb 2003 | 66.7                          | 33.3           | 100.0 |
| Jan - June 2003      | 65.9                          | 34.1           | 100.0 |
| Sept 2003 - Feb 2004 | 65.9                          | 34.1           | 100.0 |
| Jan - June 2004      | 64.8                          | 35.2           | 100.0 |
| Sept 2004 - Feb 2005 | 62.8                          | 37.2           | 100.0 |
| Jan - June 2005      | 62.8                          | 37.2           | 100.0 |
| Sept 2005 - Feb 2006 | 64.0                          | 36.0           | 100.0 |
| Dec 2005 - June 2006 | 63.1                          | 36.9           | 100.0 |
| Sept 2006 - Feb 2007 | 63.4                          | 36.6           | 100.0 |

### → CABLE AND SATELLITE CHANNEL AUDIENCE SHARE (%)

target: people aged 4 and over subscribing to a broader offer  
source: MédiaCabSat – Médiamétrie

|                       | audience share (%) | variation V12/V11* |
|-----------------------|--------------------|--------------------|
| 1 Eurosport           | 1.6                | -0.7               |
| 2 RTL9                | 1.4                | -0.1               |
| 3 TV Breizh           | 1.3                | =                  |
| 4 Canal+ Sport        | 1.1                | +0.2               |
| 5 Canal J             | 1.1                | =                  |
| 6 Paris Première      | 1.0                | =                  |
| 7 TiJi                | 1.0                | =                  |
| 8 13 <sup>e</sup> rue | 0.9                | +0.1               |
| 9 LCI                 | 0.9                | +0.1               |
| 10 TF6                | 0.9                | =                  |

### → 10 BEST CABLE AND SATELLITE AUDIENCES IN 2006\*\*

\*Wave11: 26 December 2005 – 11 June 2006; Wave12: 04.09.06 – 18.02.07

target: people aged 4 and over subscribing to a broader offer

source: MédiaCabSat - Médiamétrie

\*\*the channel TMC was now exclusively included in the DTT study and no longer appeared in this assessment

## consolidation of cable and satellite channel audiences in 2006

According to the results of the latest audience wave communicated by Médiamétrie (September 2006 to February 2007), cable and satellite channels recovered the viewers lost in 2005 with an audience share in subscribers to a broader offer of 36.6%, i.e. an increase of 0.6 points compared with 2005. The recovery of cable and satellite channel consumption was observed not only with their core target, 4-14 year-olds (up 1 point to 52.8%) but also with the other targets: the 15-24 bracket (up 1.7 points to 38.9%), the 15-49 bracket (up 0.6 points to 38.1%) – with, for this target, a greater increase in women (up 1.5 points to 34.8%) than for men (up 0.1 points to 41.8%). In contrast to the previous wave, audiences in the higher socio-professional categories fell back (-1.1 points) to 36.1%.

## Eurosport confirmed its pole position

Although down by 0.7 points compared with the previous wave – which did not include the 2006 football World Cup – Eurosport kept its leading position in the cable and satellite channel ranking, with 1.6% of audience share, ahead of RTL 9, down by 0.1 points at 1.4%. TV Breizh, in third place, registered a stable audience share at 1.3%. Canal+ Sport confirmed its increase, passing the 1% audience threshold (1.1%). The shares of Canal J, Paris Première, TiJi, 13<sup>e</sup> rue and TF6 did not change very much, lying between 0.9% and 1.1%.

## success of DTT confirmed

Free DTT was launched on 31 March 2005, and offered 18 channels: TF1, France 2, France 3, Canal+, France 5, M6, Arte, Direct 8, W9, TMC, NT1, NRJ12, LCP-Assemblée Nationale/Public Sénat, France 4, i-Télé, Europe 2 TV, BFM TV and Gulli. Since December 2005, DTT also makes it possible to subscribe to 11 pay channels included in the CanalSat and TPS packages. According to Médiamétrie, 7.3 million individuals had access to the broader DTT offer by the end of 2006, i.e. 12.7% of French TV households. According to NPA Conseil, DTT covered 63.7% of the French population in January 2007. According to the Médiamétrie wave of 30 October to 31 December 2006, viewers equipped with DTT consumed more of the "Other TV channels" (local, regional, foreign, theme channels, DTT channels, unsigned channels and interactive services), than the entire number of TV households (23.1% versus 14.5%). Apart from the general interest channels presented on the analogue network, TMC gained the highest audiences (3.8% of audience share) during the period under study, followed by the children's channel Gulli (3.7%), W9 (3.3%) and NT1 (2.8%).

|    | title  | channel  | genre         | date         | average<br>videotaping rate<br>(%) |
|----|--|----------|---------------|--------------|------------------------------------|
| 1  | L'Odyssée de la vie                                    | France 2 | documentaries | 31 January   | 6.0                                |
| 2  | Le Village des Enfoirés                                | TF1      | variety       | 7 April      | 5.7                                |
| 3  | ER / The Man with No Name                              | France 2 | series        | 17 September | 4.3                                |
| 4  | Comme au cinéma l'hebdo                                | France 2 | magazine      | 31 January   | 4.0                                |
| 5  | L'Empire du tigre / part 2                             | TF1      | TV film       | 6 March      | 4.0                                |
| 6  | Grey's Anatomy / Damage Case                           | TF1      | series        | 9 October    | 3.9                                |
| 7  | Without a Trace / Safe                                 | France 2 | series        | 17 September | 3.9                                |
| 8  | Pirates of the Caribbean: the Curse of the Black Pearl | TF1      | film          | 24 October   | 3.7                                |
| 9  | CSI: Crime Scene Investigation / Rashomama             | TF1      | series        | 8 October    | 3.7                                |
| 10 | Lost / The Others                                      | TF1      | series        | 5 August     | 3.3                                |

### → THE TOP 10 VIDEO RECORDINGS IN 2006

video recording rate: 1%= 174,540 households equipped with a VCR  
source: Médiamat – Médiamétrie



*The Queen* by Stephan Frears  
© Laurie Sparham / 2006 Grana Screen LTD / Pathé Renn Production SAS / Bim Distribuzione



*Dolmen* by Didier Albert © Julien Cauvin / TF1



*March of The Penguins* by Luc Jacquet

*Devenir un homme en Afrique* by Jean Queyrat © ZED

*Perfume: The Story of A Murderer* by Tom Tykwer © Metropolitan FilmExport

