

IMZ Industry Report

The Reach of Classical Music on
Public Service Media in 2024

Insights from broadcasting data
in Europe and beyond.

Published in September 2026.

About This Report

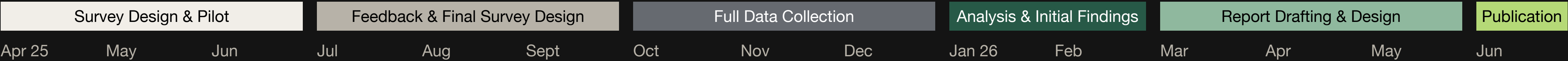
Why This Report Matters

This is the first report of its kind to examine the reach of the audiovisual performing arts industry, with a particular focus on classical music. Drawing on data collected from 24 broadcasters across 16 countries, it identifies key trends in the distribution and consumption of classical music content across Europe and beyond. At a time of shrinking budgets in the media and cultural sectors, the report provides evidence of the industry's reach and demonstrates its cultural value and continued relevance.

Intended Use of the Report

This report has been developed as an advocacy tool, providing stakeholders with evidence of the reach and significance of classical music programming. The insights presented here can inform strategic planning, including audience development, programming, and investment decisions. Published on a regular basis, future editions will make it possible to track changes over time and identify emerging trends across the audiovisual performing arts sector. By supporting informed decision-making and encouraging collaboration, the report aims to strengthen the long-term sustainability of the sector.

Timeline



Questionnaire Overview

What We Asked and Why

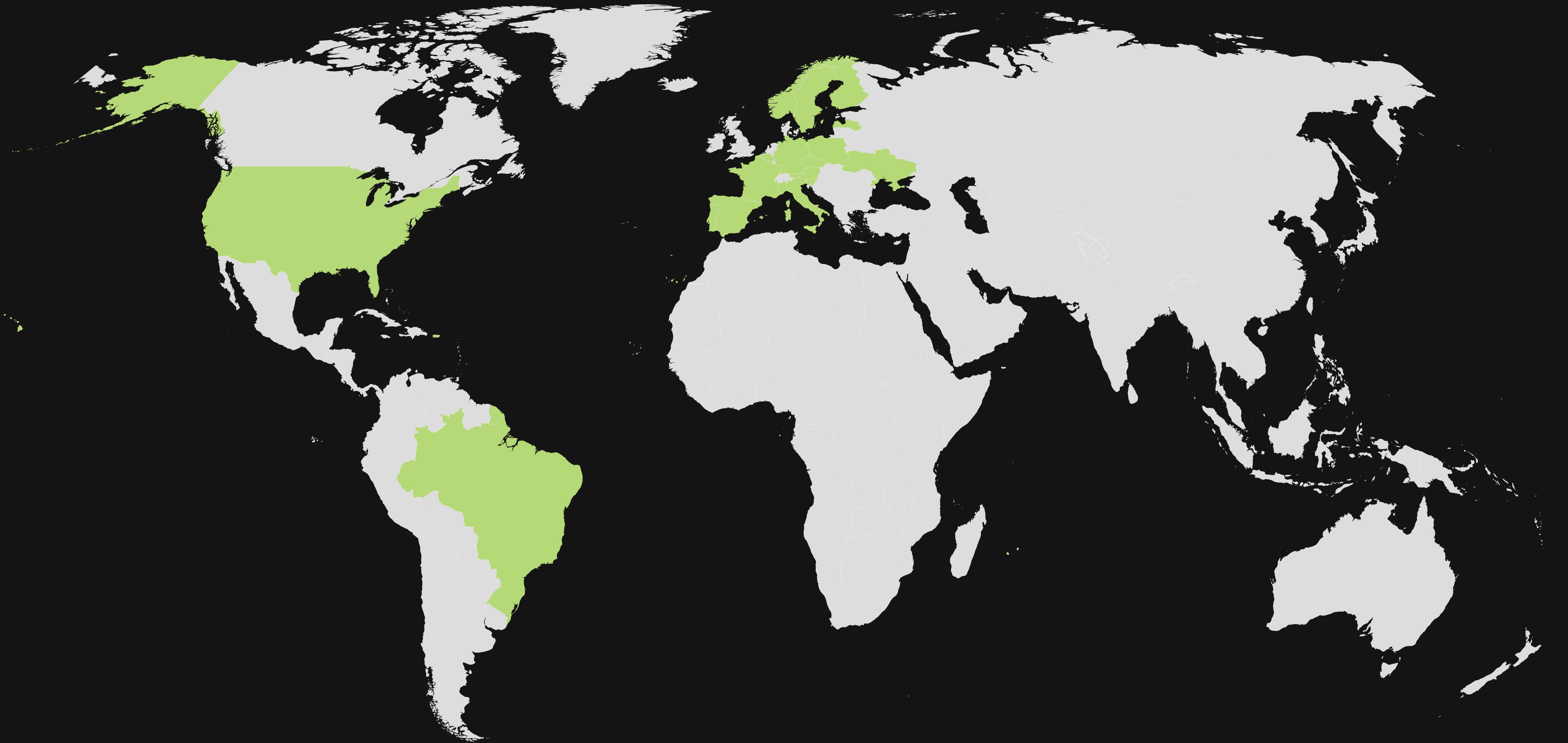
The IMZ Industry Questionnaire was designed to capture key indicators that reflect the performance and impact of classical music programming across broadcasters. It focuses on four main areas:

- **Audience Reach & Viewership:** assesses how many people engage with classical music programmes on TV and online, and how viewing habits differ across platforms.
- **Programming Allocation:** measures how much airtime is dedicated to classical music compared to other cultural and music content, including weekly slots and total hours.
- **Popular Genres:** identifies which formats (opera, ballet, concerts, and documentaries) attract the most audience attention and engagement.
- **Production & Acquisitions:** examines how content is created, including commissions, co-productions, and acquisitions from domestic and international sources.

Definitions

- **Classical music programme:** a broadcast programme in which classical music is the primary subject matter, including concerts, chamber music, opera, ballet, and music documentaries.
- **Online platform:** a digital service providing video content via the internet, including broadcaster video-on-demand (VOD) services, streaming platforms, and official broadcaster websites and apps.
- **Cultural programme:** audiovisual content centred on artistic, historical, or cultural expression, including performing arts broadcasts, cultural documentaries, literary programmes, films of cultural relevance, and features on visual arts, heritage, and cultural practices.
- **Generalist channel:** a channel offering a broad range of content categories and designed to reach a wide audience.
- **Thematic channel:** a channel focused on a specific content category (e.g. arts and culture) and designed to reach a specialised audience.

Participating Countries



Executive Summary

The State of Audiovisual Classical Music in 2024

This report presents the findings of the first IMZ Industry Questionnaire on the reach and relevance of audiovisual classical music programming on Public Service Media, based on 2024 data. Drawing on responses from 24 public broadcasters across 16 countries, it offers a data-driven overview of how classical music is distributed, consumed, and produced across linear television and online platforms.

The findings demonstrate that classical music programming continues to reach substantial audiences, with more than 157 million reported viewers in 2024. Reach figures range from tens of thousands to tens of millions, depending on broadcaster size and distribution model. Taken together, these figures show that classical music, while representing a specialised programming area, maintains a significant audience reach and remains an essential component of cultural broadcasting.

Linear television remains the dominant medium for mass reach, accounting for more than two thirds of consumption on generalist channels, while thematic channels show an almost even split between linear and online.

Concerts lead viewership, across both distribution models, followed by documentaries, opera and ballet. Among concerts, flagship live events attract the largest audiences, with the *New Year's Concert of the Vienna*

Philharmonic, the *Vienna Philharmonic Summer Night Concert*, and the *Concert de Paris* ranking as the most-watched productions. The majority of concert programmes are in-house productions, with the rest split between co-productions, domestic and international acquisitions, and commissions, which account for the smallest share at only 4%.

In terms of overall programming, classical music represents a modest yet meaningful share of total broadcast schedules, while accounting for a significant proportion of cultural and music programming. This share, of both total and cultural programming, is significantly higher on thematic channels than on generalist ones. Within music programming specifically, however, classical music's share is higher on generalist channels.

Half of all classical music programmes air on Sundays across generalist and thematic channels, with programming concentrated around special events, seasonal concerts, and cultural highlights.

Overall, the findings demonstrate that classical music remains a significant component of cultural broadcasting: it reaches large audiences through both linear and online platforms, driven by high-performing concert formats. This report underlines the importance of maintaining and supporting access to classical music content within the audiovisual landscape.

Audience Reach

Classical music programming continues to reach wide audiences: 157 million viewers in 2024.

Linear Television

138M
total audience reach

82M

Generalist
Channels

56M

Thematic
Channels

Online Platforms

19M
total audience reach

3M

Generalist
Channels

16M

Thematic
Channels

Reach figures range from tens of thousands to tens of millions, depending on broadcaster size and distribution model. Linear television reports the largest viewership, demonstrating its importance for mass reach, while online platforms show a smaller, but significant, engagement. The data indicate that generalist channels achieve a greater reach for classical music programming on linear television, while thematic channels demonstrate a comparatively stronger reach on online platforms. Across all participating broadcasters, classical music programming reached more than 157 million reported viewers in 2024 across linear television and online platforms.

Note: Audience reach measures how many viewers tuned in to classical music programmes for at least 15 consecutive minutes. It compares reach across TV and online platforms to show audience distribution. A number of channels have restrictions on reporting data on online platforms, resulting in a smaller data set for digital engagement. Based on responses from 19 broadcasters (12 GC, 7 TC)

Watching Habits

Linear TV still dominates classical music viewing.



Classical Music Programmes Consumption: Linear TV vs Online (% of Total Viewing Hours)

These figures represent the total hours of classical music programmes consumption across linear TV and online platforms. Across the reporting generalist channels, total consumption hours are TV led, with a 70% to 30% split. The viewership on specialty channels is evenly split between linear (49.5%) and online (50.5%). These numbers coincide with programming patterns, as the majority of generalist channels broadcast classical

music primarily on linear television. In contrast, thematic channels show a more balanced approach, with distribution equally divided between linear and online.

This contrast highlights that content delivery greatly impacts viewing habits, resulting in generalist channels' high reach in linear broadcasting, and thematic channels even split in distributions as well as consumption.

Note: This metric shows the percentage of total viewing hours spent on TV versus online platforms. Based on responses from 13 broadcasters (9 GC, 4 TC)

Content Types

Classical audiences gravitate to concerts first, and narrative formats second.

- 1 Concerts
- 2 Documentaries
- 3 Opera
- 4 Ballet

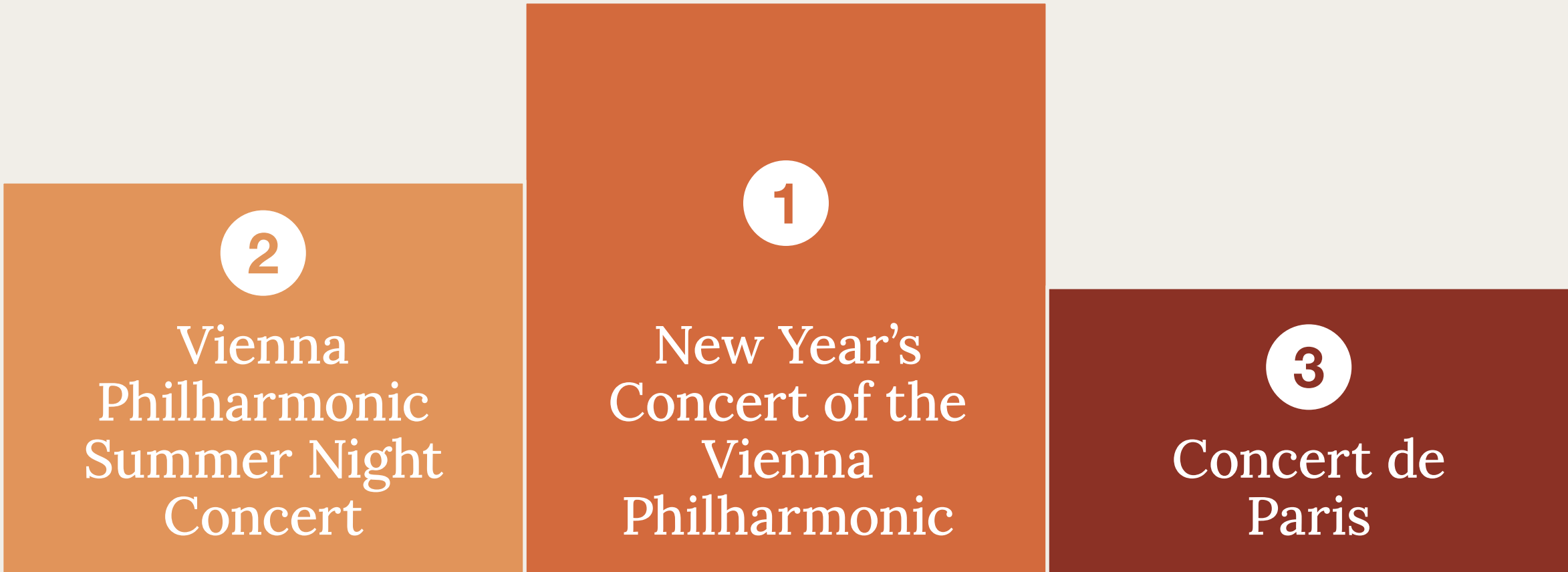
Broadcasters reported that concerts consistently perform best in average audience across markets, on both linear TV and online platforms, followed by documentaries, opera, and ballet.



Note: The ranking reflects broadcasters' qualitative assessment of viewership for each genre. Based on responses from 20 broadcasters (12 GC, 8 TC)

Most Watched Productions

These three flagship concerts attract the largest TV audiences among classical music events.



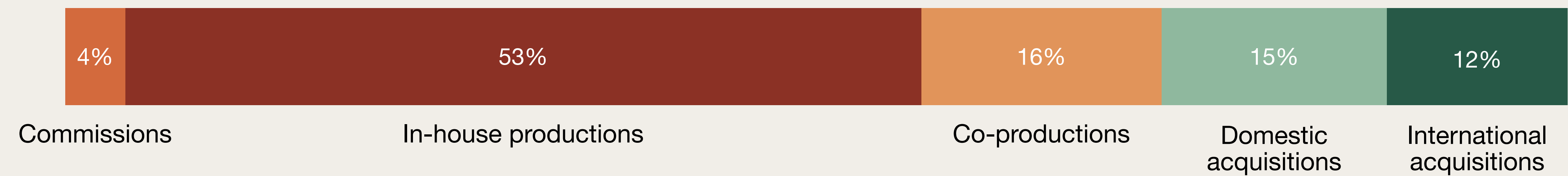
The most-watched classical music productions, both on linear television and online platforms, are dominated by live events such as the *New Year's Concert of the Vienna Philharmonic*, *Summer Night Concert Schönbrunn*, and *Concert de Paris*.



Note: The collected data contains ten most watched classical music productions, from all the respondents of the study, presented as a shortlist of the three most watched. Further productions include seasonal concerts and competitions (e.g. *Queen Elisabeth*, *Advent concerts*) as well as evergreen concert recordings, artist-focused documentaries, and thematic series. Based on responses from 21 broadcasters (15 GC, 6 TC)

Sources of Concert Programmes

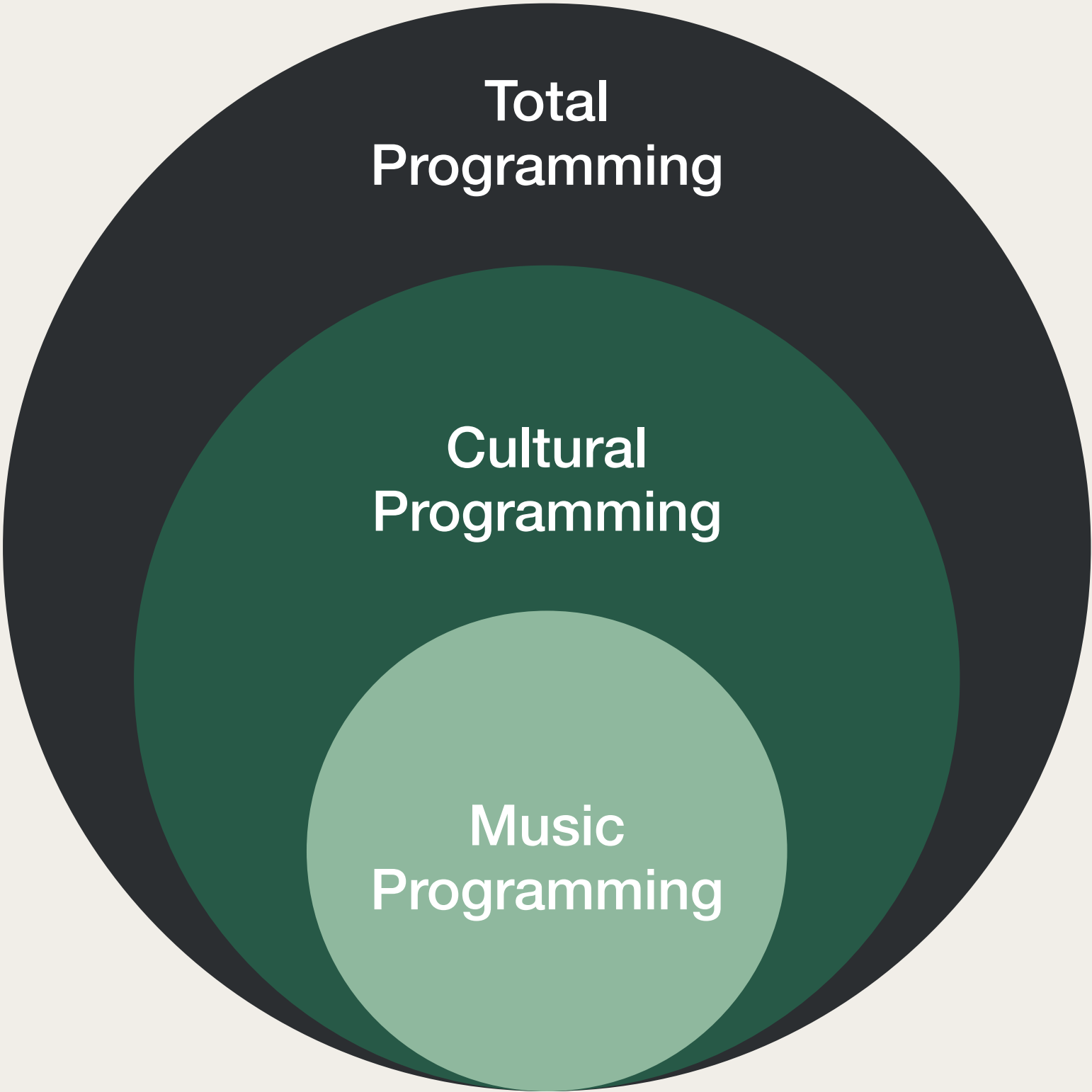
Over half of concert programmes are in-house productions, with co-productions, acquisitions, and commissions making up the rest.



The breakdown indicates a balanced strategy: original output leads, complemented by co-productions and acquisitions, both domestic and international, with commissions accounting for the smallest share.

Programming Share

Classical music maintains a strong presence in cultural programming, and a meaningful share of overall airtime.



Generalist Channels

1.2%
of the total programming

7.8%
of the cultural programming

38.2%
of the music programming

Thematic Channels

7.8%
of the total programming

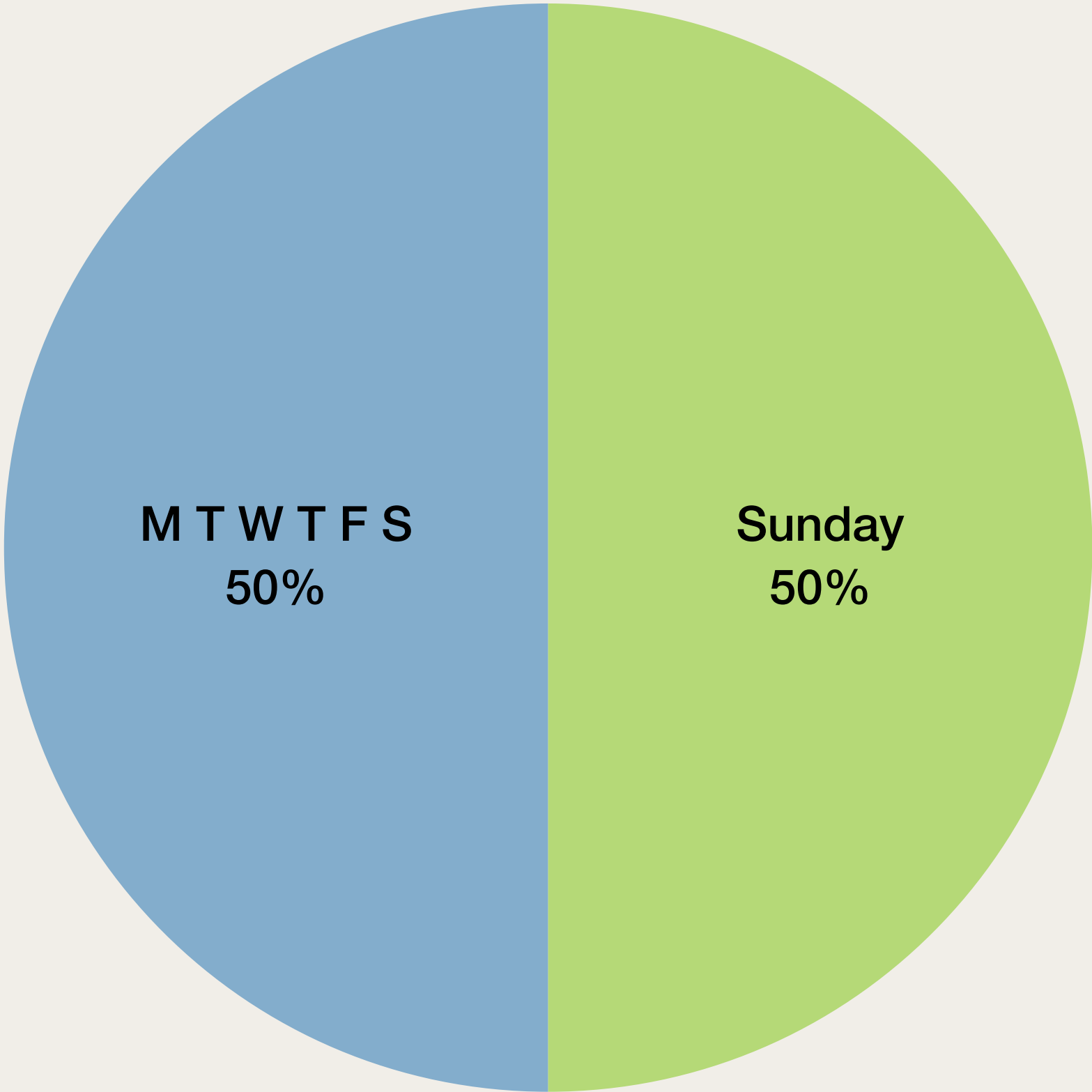
18.7%
of the cultural programming

13.5%
of the music programming

Note: The displayed numbers refer to the percentage of classical music programmes on linear TV compared to total programming, cultural programming, and music programming. Based on responses from 17 broadcasters (10 GC, 7 TC)

Weekly Classical Programming

Half of classical music programmes air on Sundays, with an average of one slot per day.



Aside fixed weekly slots for classical music on some channels, programming is concentrated around special events, seasonal concerts, and cultural highlights. Thematic channels typically reserve evening slots for classical music as part of their regular programming. Half of all classical music programming is broadcast on Sundays, across both generalist and thematic channels.

Methodology

How We Built This Report

This report is based on data collected through the IMZ Industry Questionnaire, developed and coordinated by the IMZ Office and a dedicated IMZ working group. It is based on responses from 24 public broadcasters (15 generalist and 9 thematic channels) across 16 countries, submitted online. Responses were anonymised and aggregated to ensure confidentiality and comparability across markets.

The analysis is quantitative in nature, drawing on internal statistical data that participating organisations already collect as part of their standard operations. Three analytical approaches were applied: descriptive analysis to establish the current state of classical music programming across the sample; comparative analysis to identify differences between linear TV and online platforms, as well as generalist and thematic channels; and correlation analysis to explore relationships between the aforementioned variables.

Trends will be reported starting with the second edition of the report; any markets with significant methodological differences were excluded from the aggregated data.

Limitations

Data collection presented several challenges. The absence of a universal methodology for statistical data collection across broadcasting organisations, combined with varying internal structures and reporting practices among respondents, made it difficult to gather consistent and comparable data across all participants. While this affected the availability of certain indicators and resulted in different sample sizes throughout the report, the collected data offers an overview of the state of audiovisual classical music programming in 2024.

Metrics

- **Audience Reach (%)**: Everyone who tuned in to classical music programs for at least 15 consecutive minutes.
- **Online Reach (Total users)**: Total number of unique accounts and/or unique browsers reached by classical music programmes across online platforms in 2024.
- **TV Consumption (%)**: Share of total television consumption represented by classical music programmes, based on total viewing hours.
- **Average Audience**: The average number of viewers watching during any given minute of the programme (Average Minute Rating: AMR).

Who We Are

About the IMZ

The IMZ International Music + Media Centre is the global network dedicated to promoting the performing arts through audiovisual media. Based in Vienna and founded under the aegis of UNESCO in 1961, the IMZ works to preserve the performing arts as a cultural asset and strengthen their visibility and sustainability across the media landscape.

As an international business network with more than 150 member organisations, the IMZ connects creators in the performing arts—the world’s renowned stages, dance companies, operas, and concert houses—with the audiovisual sector, including film and TV production, distribution, public and private broadcasting, and streaming + VOD platforms.



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