

EBU

OPERATING EUROVISION AND EURORADIO



HAVE A LOOK AT THE MARKET!

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HEAD OF THE MEDIA INTELLIGENCE SERVICE (MIS)

WIEN, JUNE 15TH 2015

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MEDIA INTELLIGENCE SERVICE

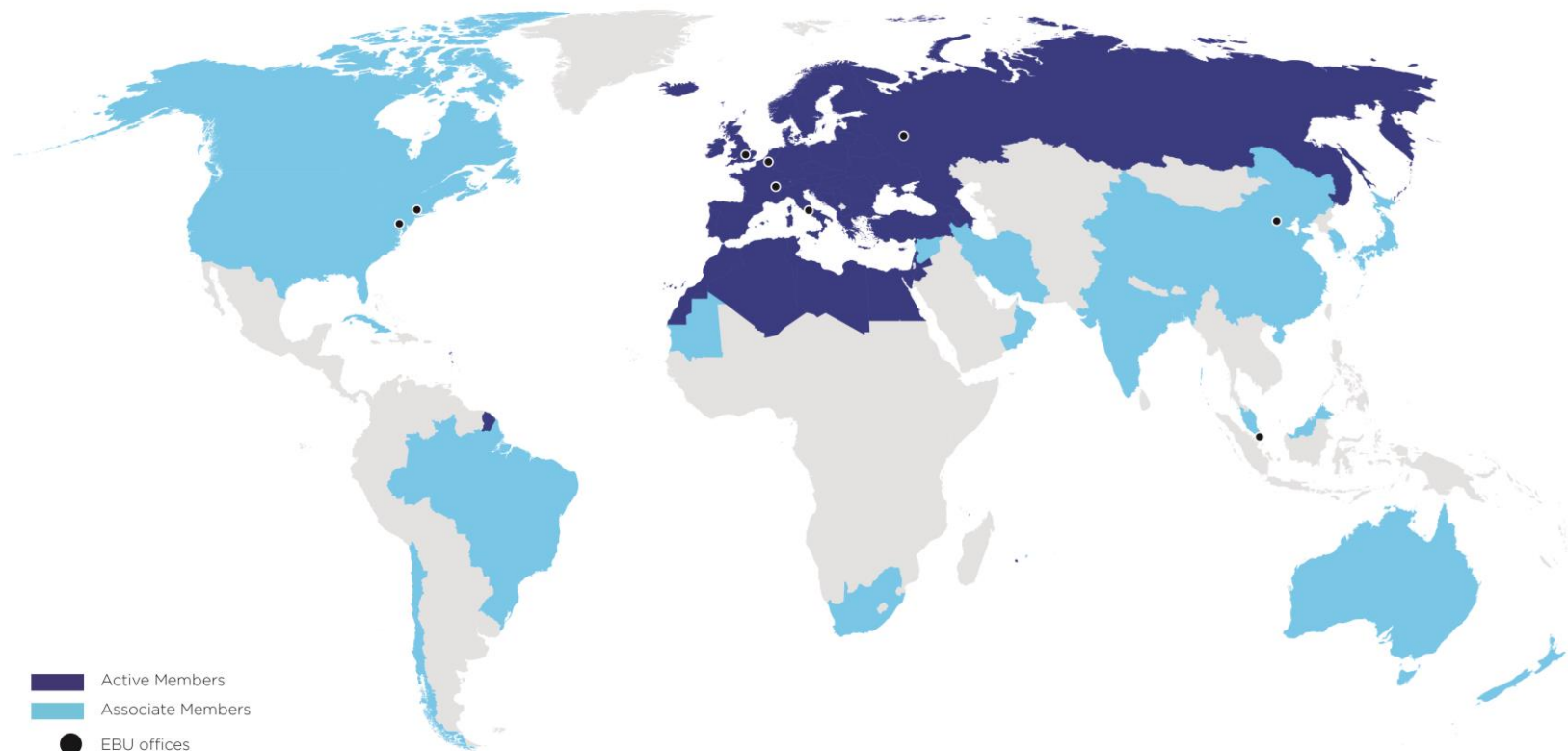
Providing EBU departments and Members with reliable market data, trustworthy analysis and relevant arguments.



www.ebu.ch/mis


mis@ebu.ch

EBU GLOBAL PRESENCE



THE EBU IN NUMBERS



The EBU has **73**  active Members

in **56**  countries

operating **913**  TV services

and **854**  radio services

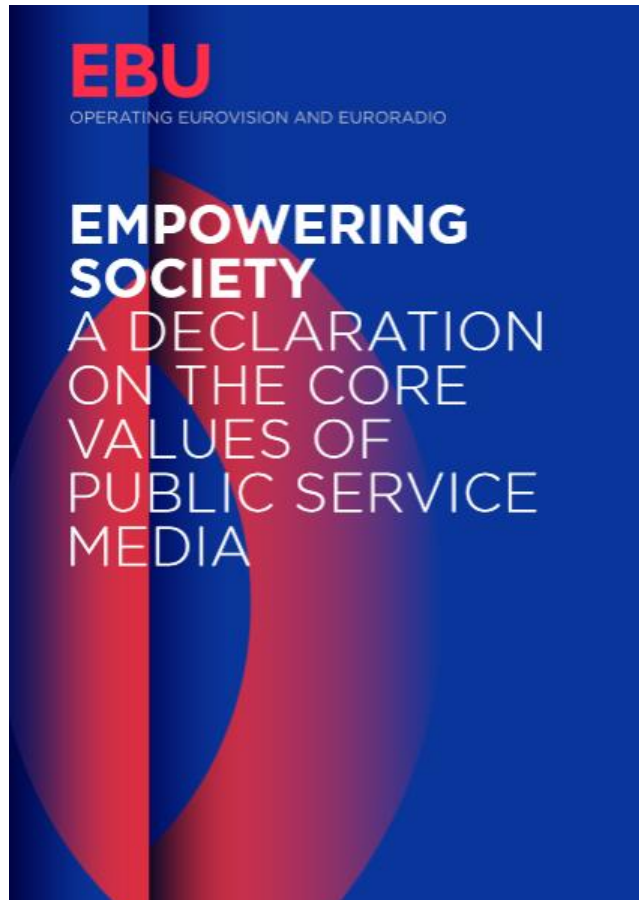
broadcasting in **96**  languages

with a potential audience of **1.02**  billion

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EBU PUBLIC SERVICE MEDIA VALUES



UNIVERSALITY

INDEPENDENCE

EXCELLENCE

INNOVATION

DIVERSITY

ACCOUNTABILITY

EUROPE FACES A TRUST/GOVERNANCE CRISIS

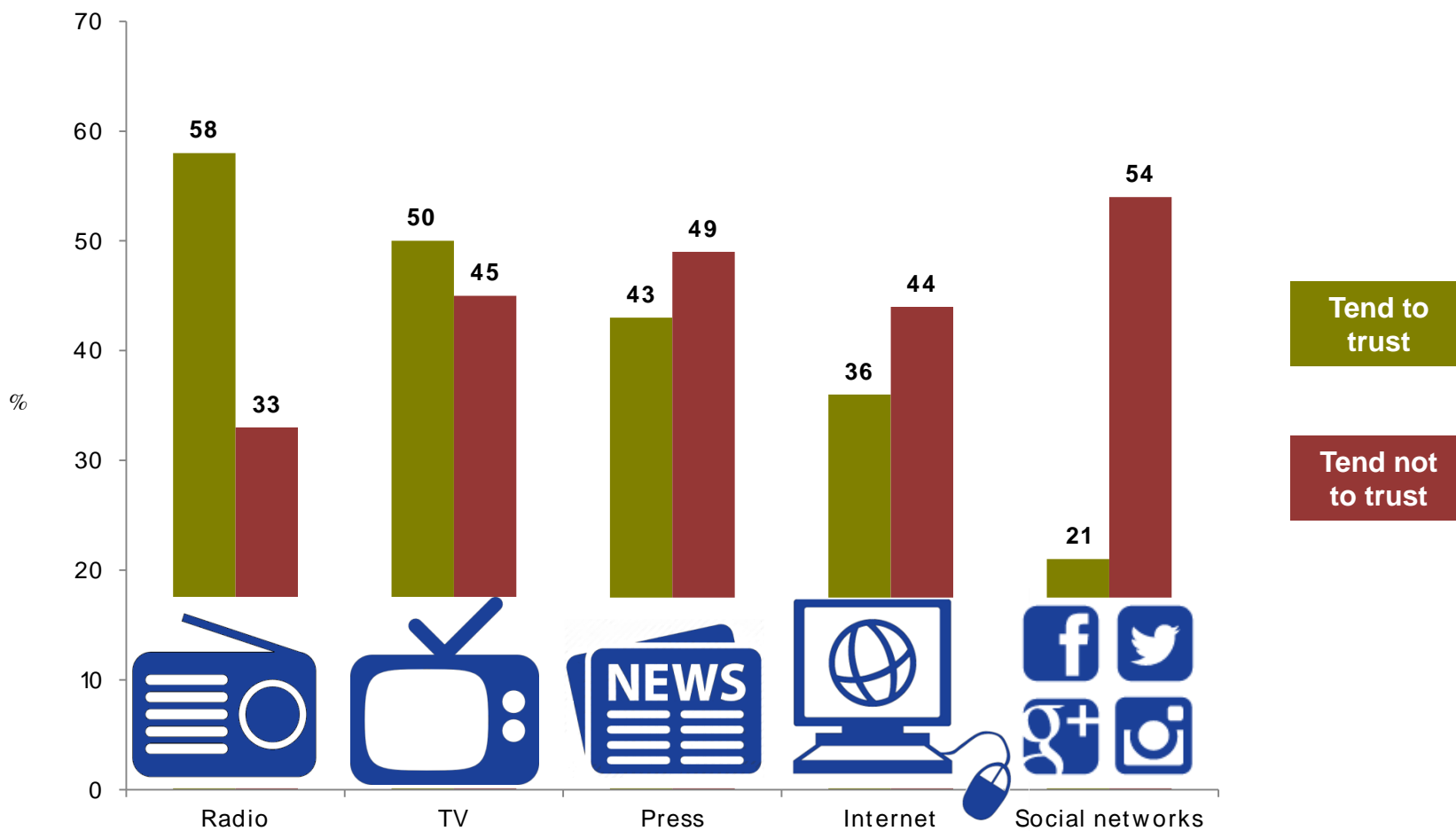


You Tube
Broadcast Yourself™

facebook

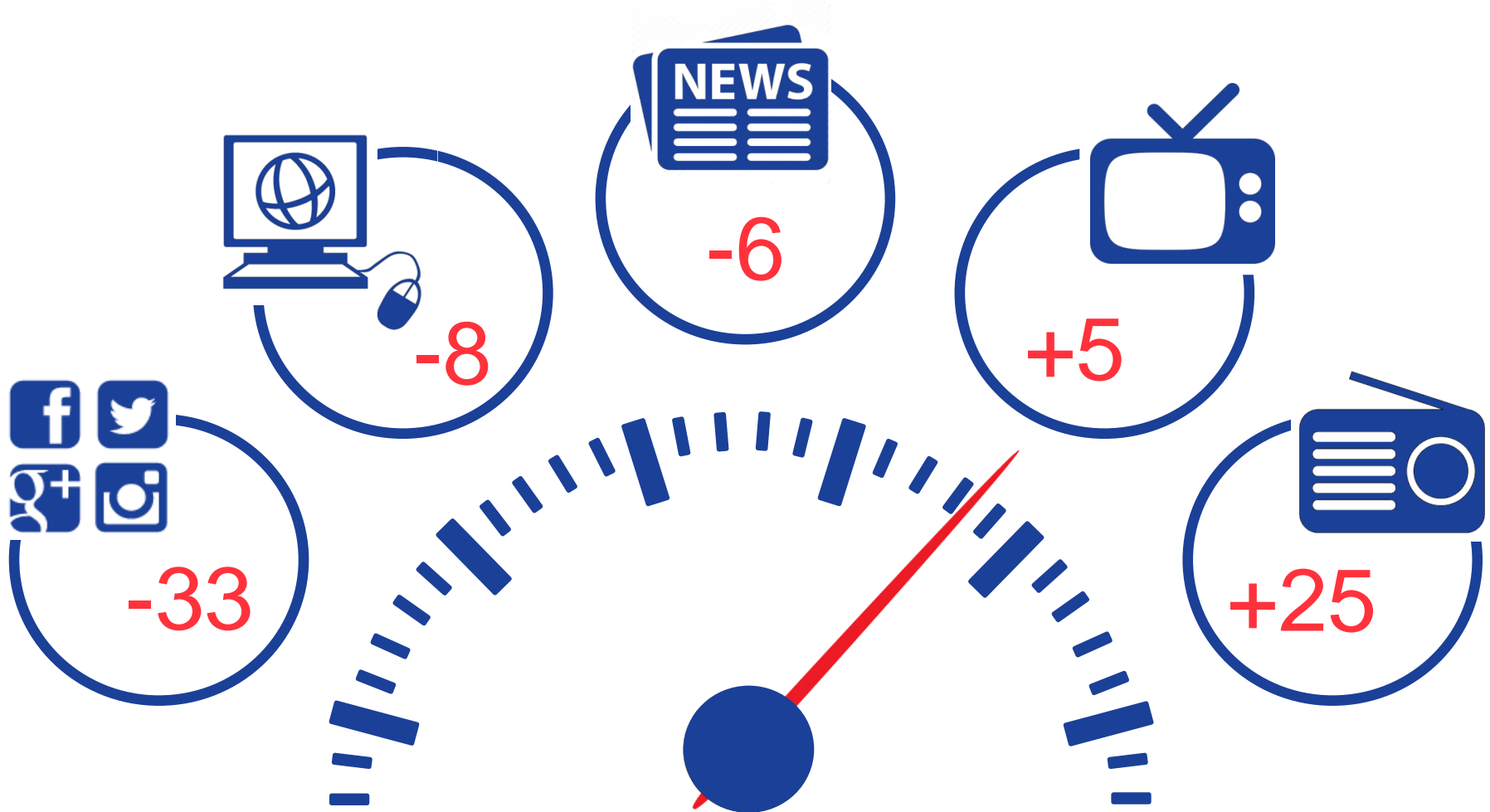
twitter

TRUST IN MEDIA



Source: EBU based on Eurobarometer 82

TRUST IN MEDIA



NET TRUST INDEX = TEND TO TRUST – TEND NOT TO TRUST

SOCIETY CHANGES....

digital

mobile

Sharing / recommending/ curating



Multi-screen

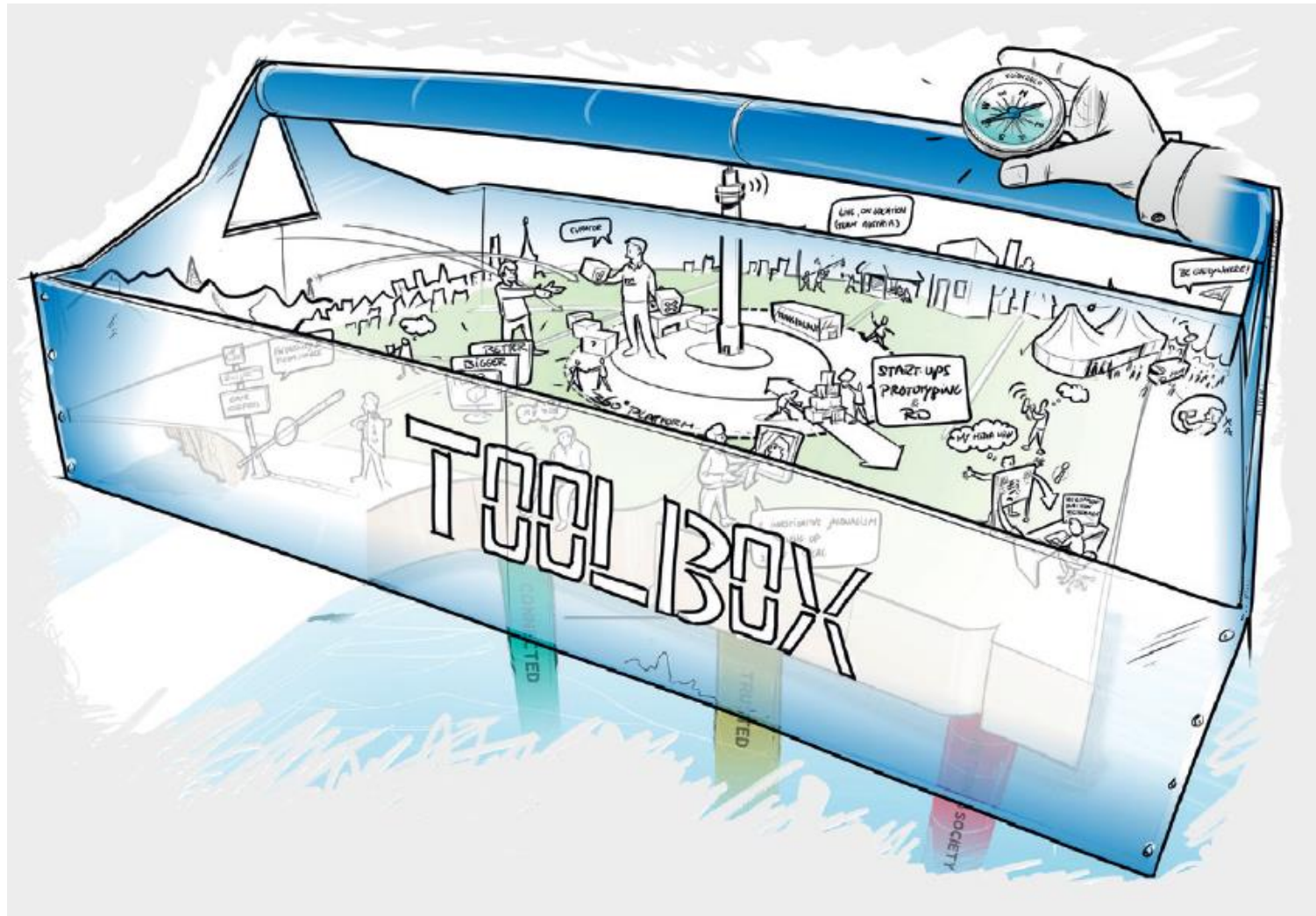
on-demand

online

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SOCIETY CHANGES, SO MUST PSM



HOW DOES THE EBU DRIVE CHANGE?



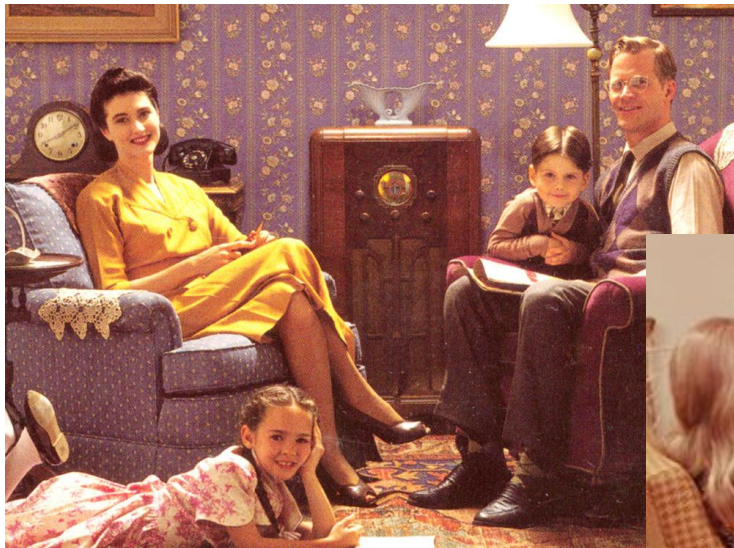
HOW TO BE INDISPENSABLE?

HOW DOES THE EBU DRIVE CHANGE?



vision2020.ebu.ch

TECHNICAL 'SIMPLICITY' MADE IT 'EASY' TO DELIVER PUBLIC SERVICE TV AND RADIO



TECHNOLOGY INNOVATION TURNS THE 'SIMPLE' BROADCASTING ENVIRONMENT INTO A COMPLEX MEDIA SCENARIO



PUSHED BY DEVICES, PEOPLE ARE CHANGING THEIR MEDIA CONSUMPTION TRENDS

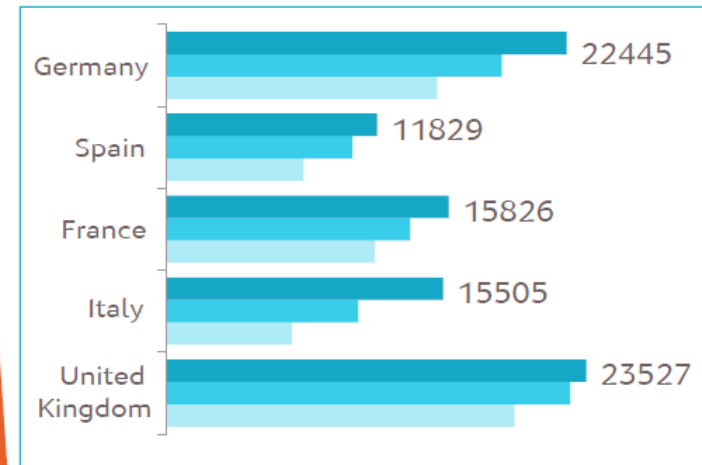
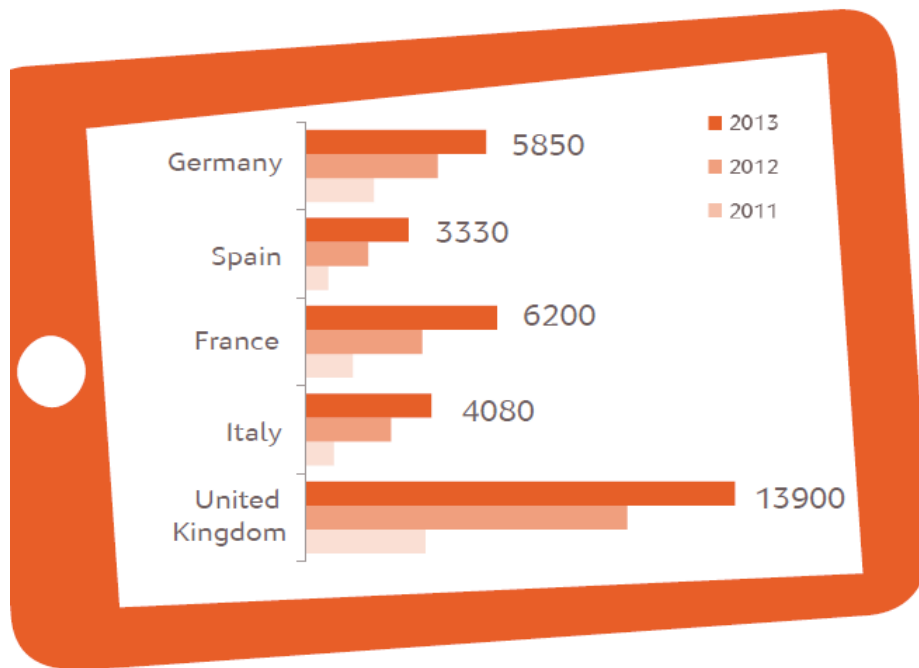


PUSHED BY DEVICES, PEOPLE ARE CHANGING THEIR MEDIA CONSUMPTION TRENDS

Continual increase of tablet and smartphone sales since 2011

Units sold (000)


Eurodata TV
WORLDWIDE

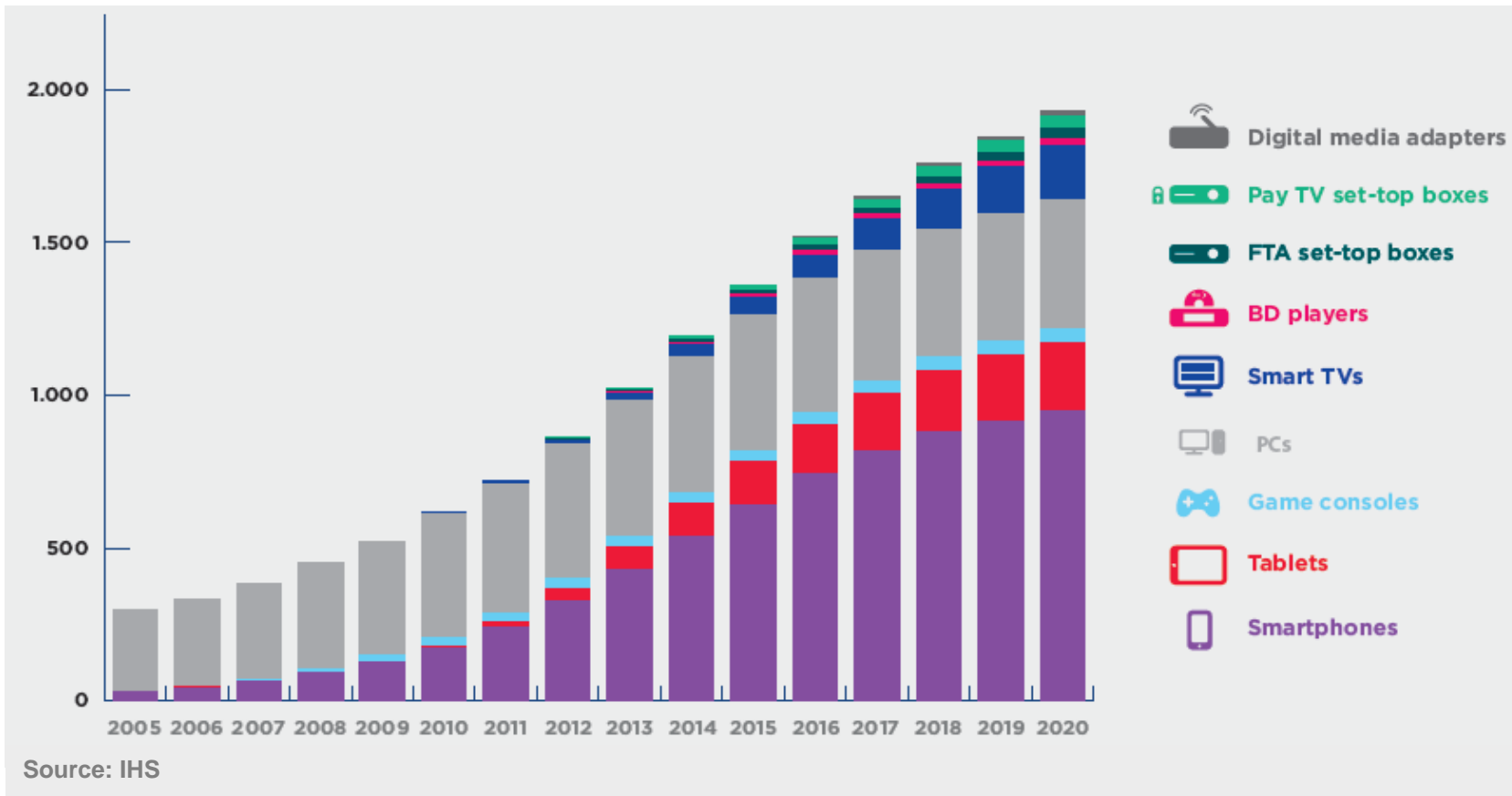


2013
2012
2011



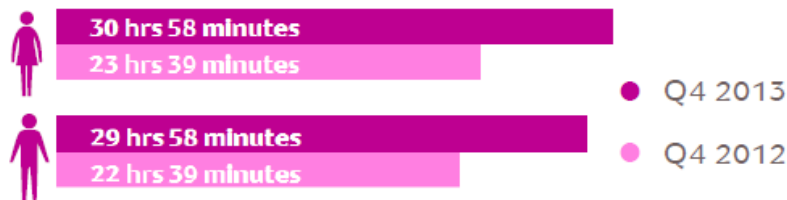
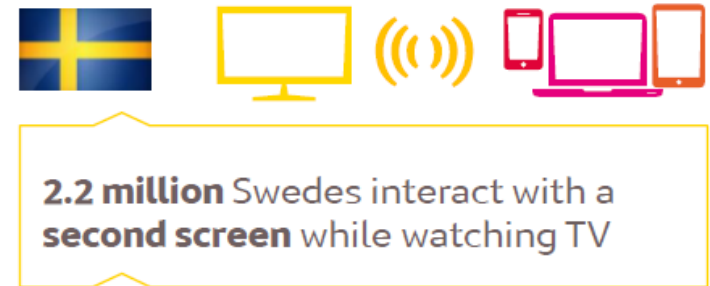
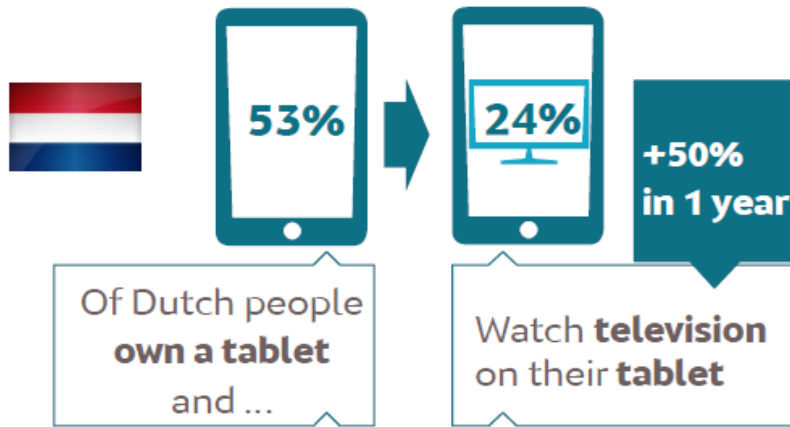
MULTIPLICATION OF DEVICES

Installed connected devices (millions)



By 2020 there will be around 2 bn connected devices across Europe, more than 8 connected devices per broadband household.

PUSHED BY DEVICES, PEOPLE ARE CHANGING THEIR MEDIA CONSUMPTION TRENDS



Sources:
 United States – Cross Platform Report Q3 2013 / Nielsen
 Netherlands – Dutch Digital Market Overview / GfK
 Sweden – MTG Digital Media
 Denmark – Media Development 2013 / DR Audience Research Department's annual report

PUSHED BY DEVICES, PEOPLE ARE CHANGING THEIR MEDIA CONSUMPTION TRENDS

AVERAGE DIGITAL QUOTIENT BY AGE

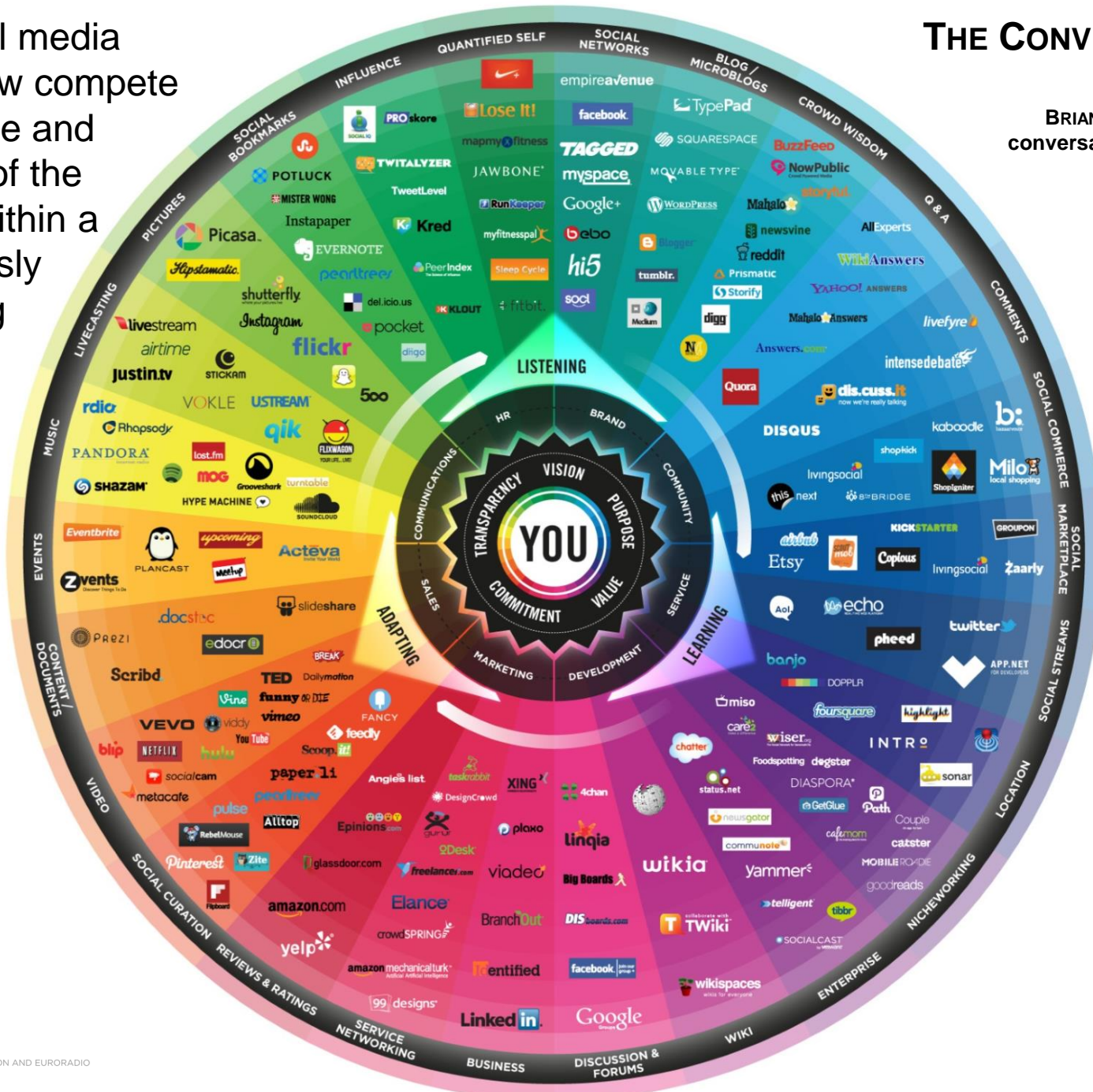


Traditional media outlets now compete for the time and attention of the viewers within a continuously expanding matrix of services.

THE CONVERSATION

PRISM

BRIAN SOLIS & JESS3
conversationprism.com



MEDIA CONSUMPTION TRENDS

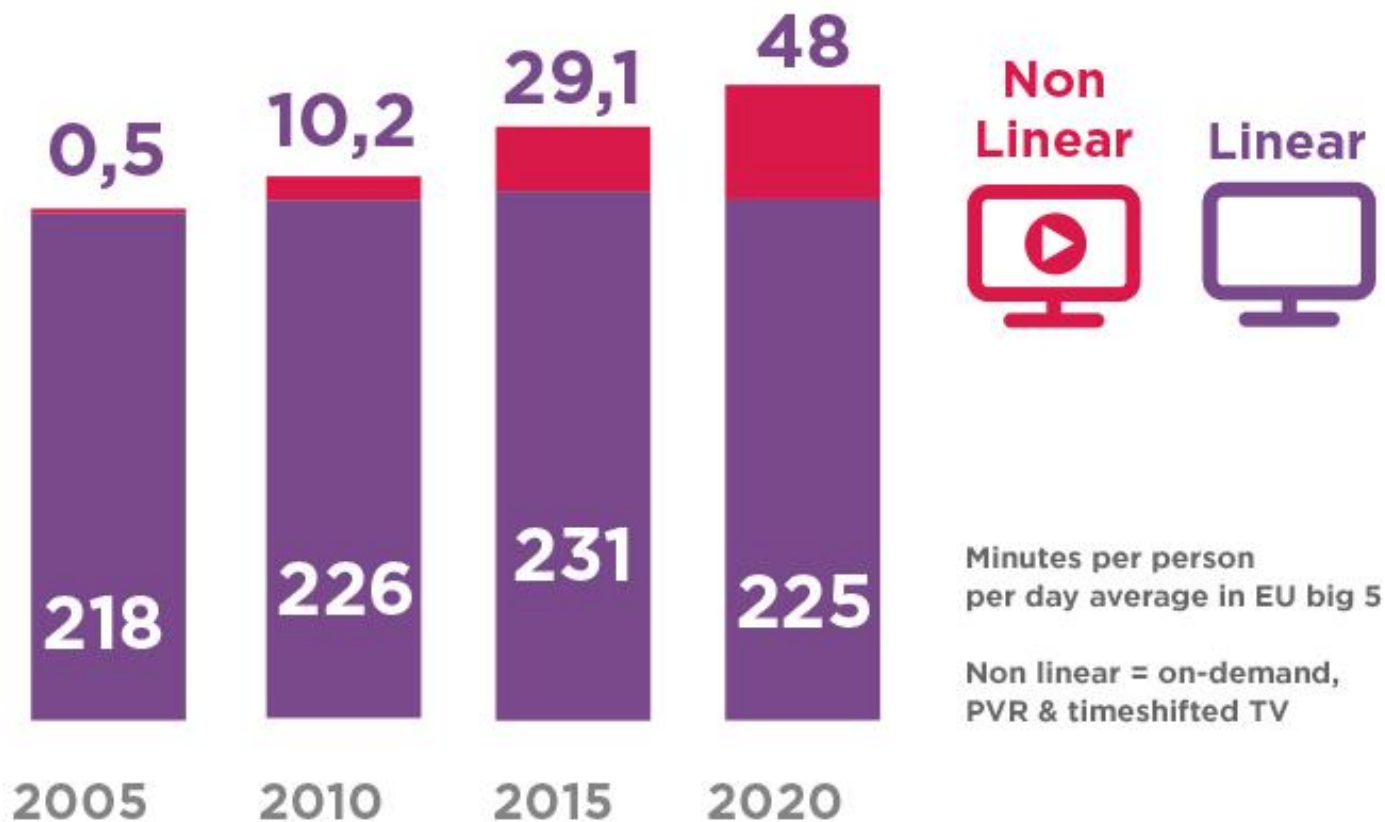
Content Curation



Recommending / Sharing

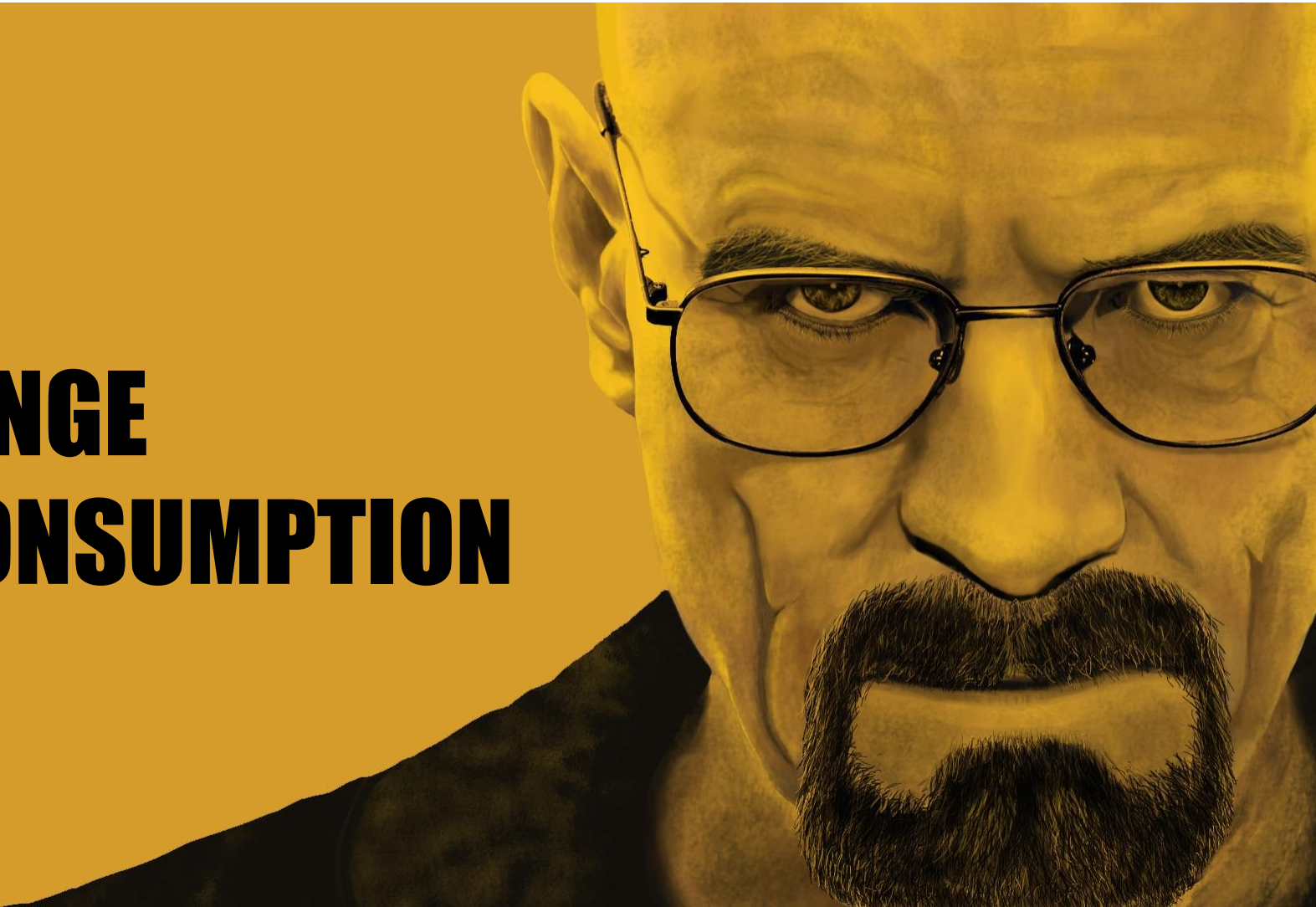
MEDIA CONSUMPTION TRENDS

EVOLUTION OF LINEAR AND NON-LINEAR TV-VIEWING



MEDIA CONSUMPTION TRENDS

**BINGE
CONSUMPTION**



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A MEDIA SCENARIO WHERE COMPETITION INCREASES EXPONENTIALLY



A MEDIA SCENARIO WHERE COMPETITION INCREASES EXPONENTIALLY



LIBERTY GLOBAL



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FAST DEVELOPMENT OF THE SVOD OFFER

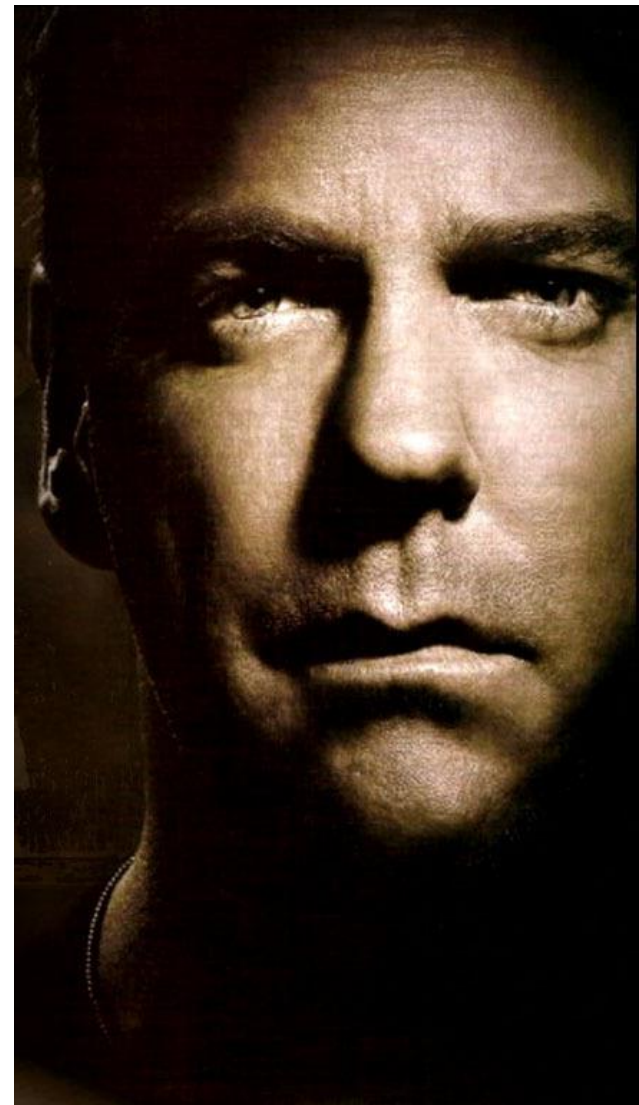


MEDIA CONSUMPTION TRENDS

**Will we witness
the end of the TV
era?**

EBU

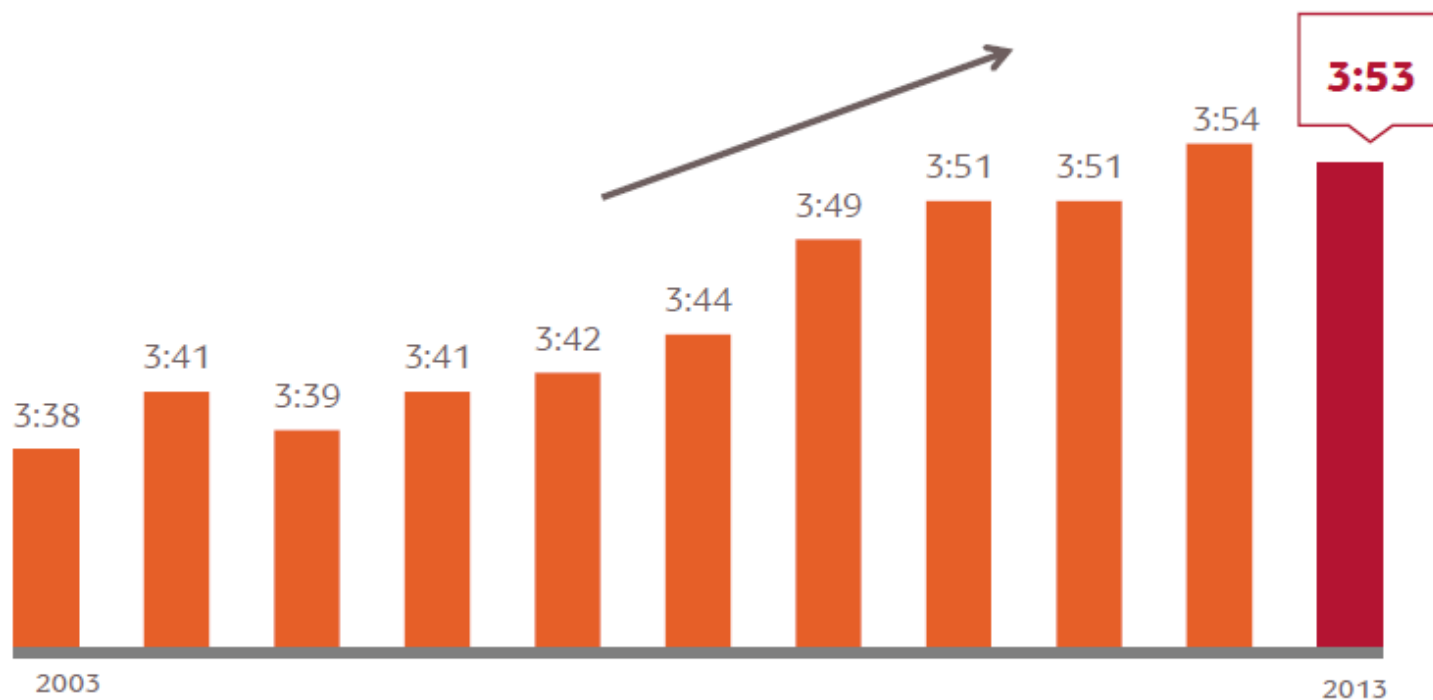
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TV CONSUMPTION TRENDS

TV consumption: +15 minutes in 10 years

Mega panel* 2003-2013 of 48 countries



HOW DOES PUBLIC SERVICE TV PERFORM IN EUROPE?



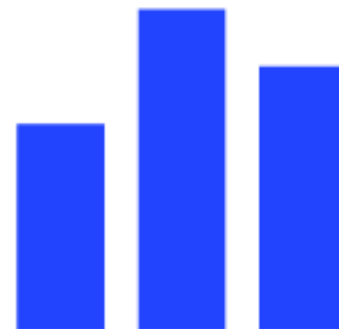
383

**million European citizens
watch public service TV
at least once a week**

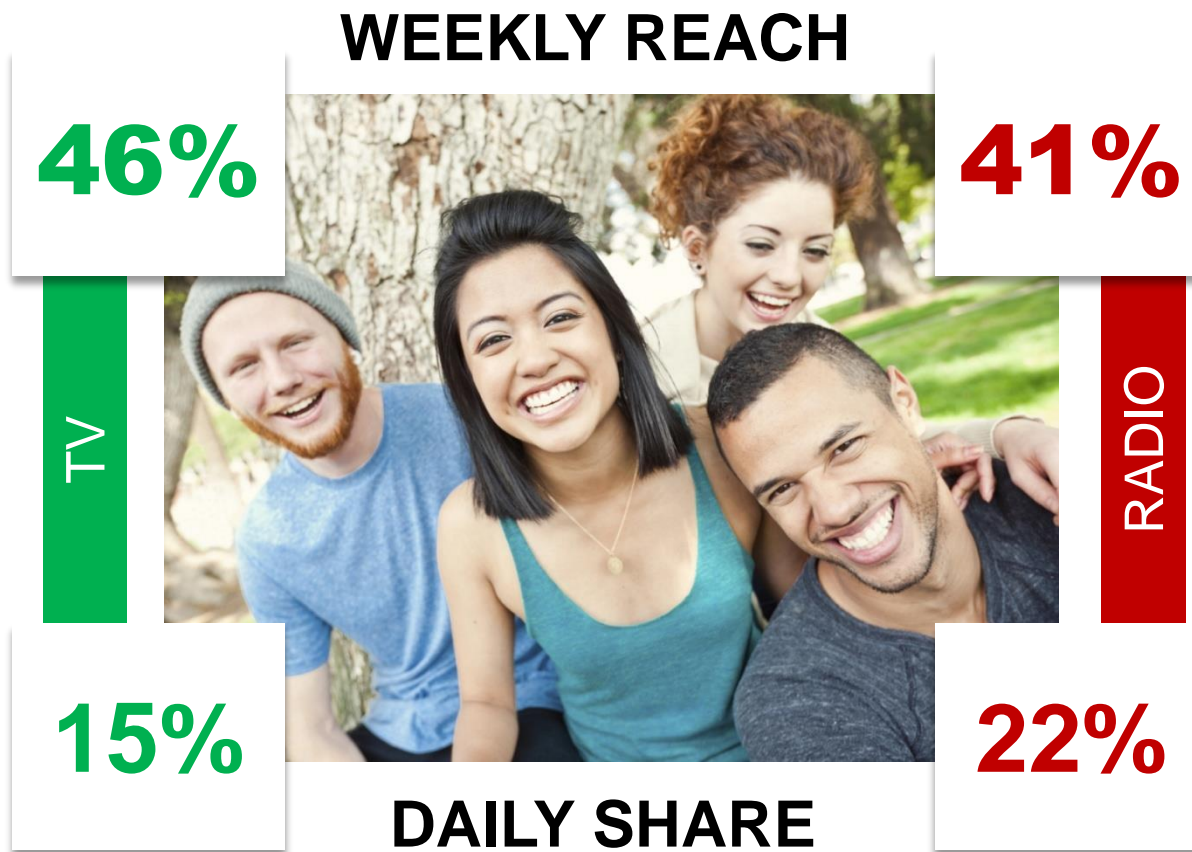
**EBU public service Members
achieve an average**

24%

market share



YOUNG PEOPLE USE PUBLIC SERVICE



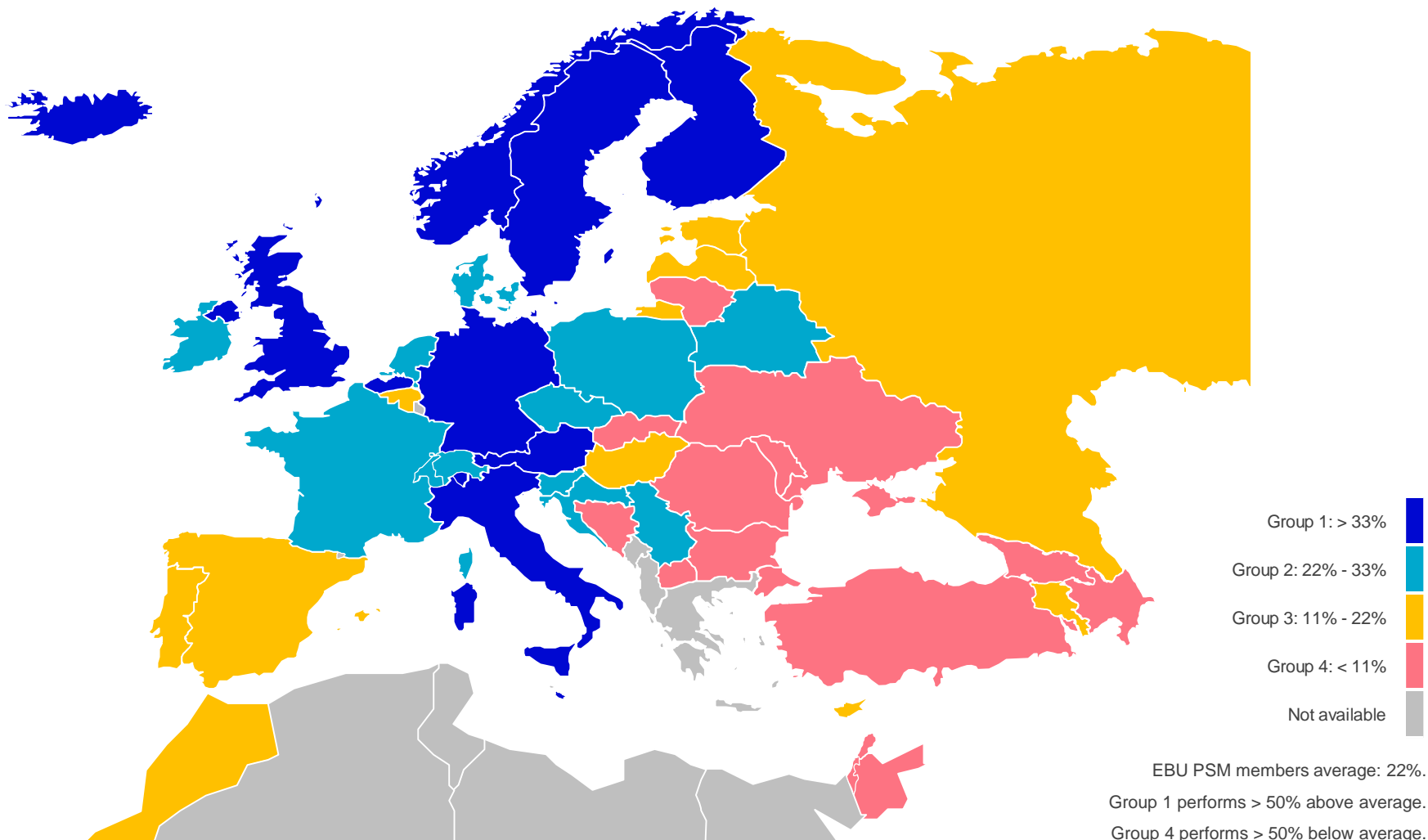
Source: EBU based on members data. Age basis: 15-24 (may vary slightly by market) Reach basis: Weekly 15+ min consecutive.

TV: Reach from 25 organizations/Share from 31 organizations.

Radio: Reach from 26 organizations/Share from 23 organizations

TV: MARKET SHARE

Total national market share of all TV channels of EBU PSM members (2013, total individuals)

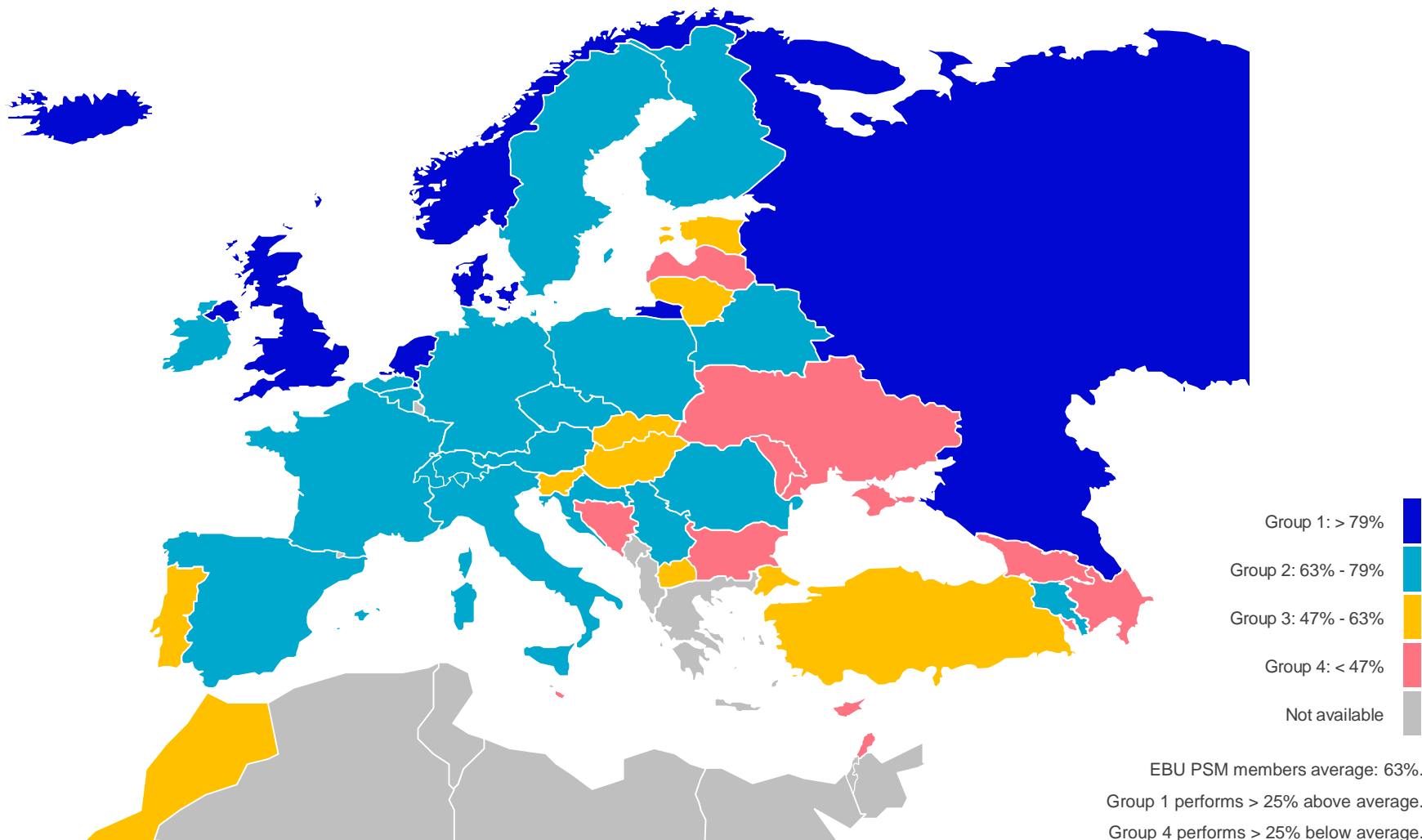


PSM BAROMETER 2014

Source: EBU based on Members' Data / Eurodata TV Worldwide

TV: REACH

Total national reach of all TV channels of EBU PSM members (2013, total individuals, 15 minute consecutive weekly reach)

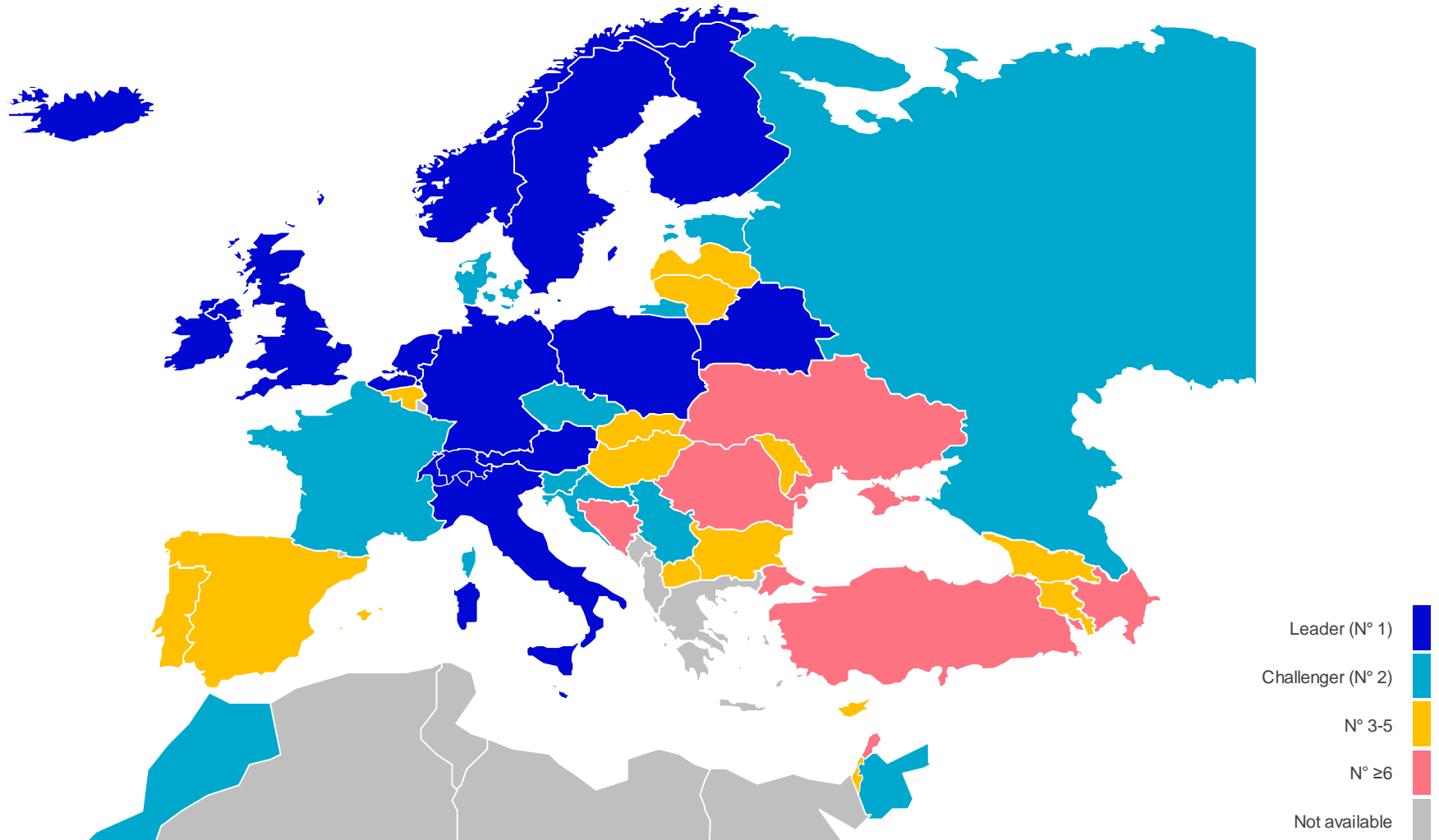


PSM BAROMETER 2014

Source: EBU based on Members' Data / Eurodata TV Worldwide

TV: RANKING OF THE MAIN PSM CHANNEL

Position of the main PSM TV channel compared to its competitors (2013, total individuals)

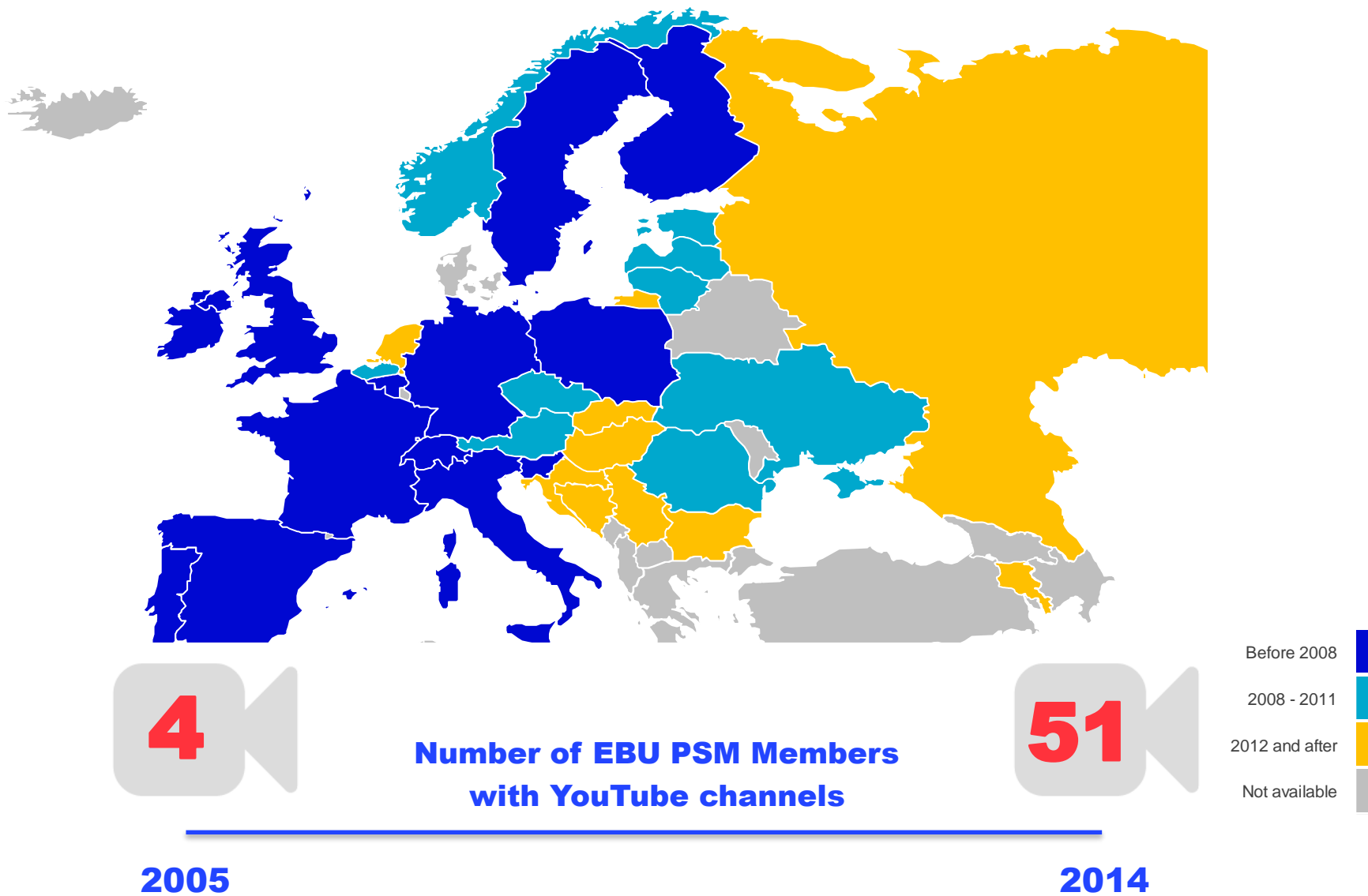


ISN'T IT ABOUT INNOVATION?



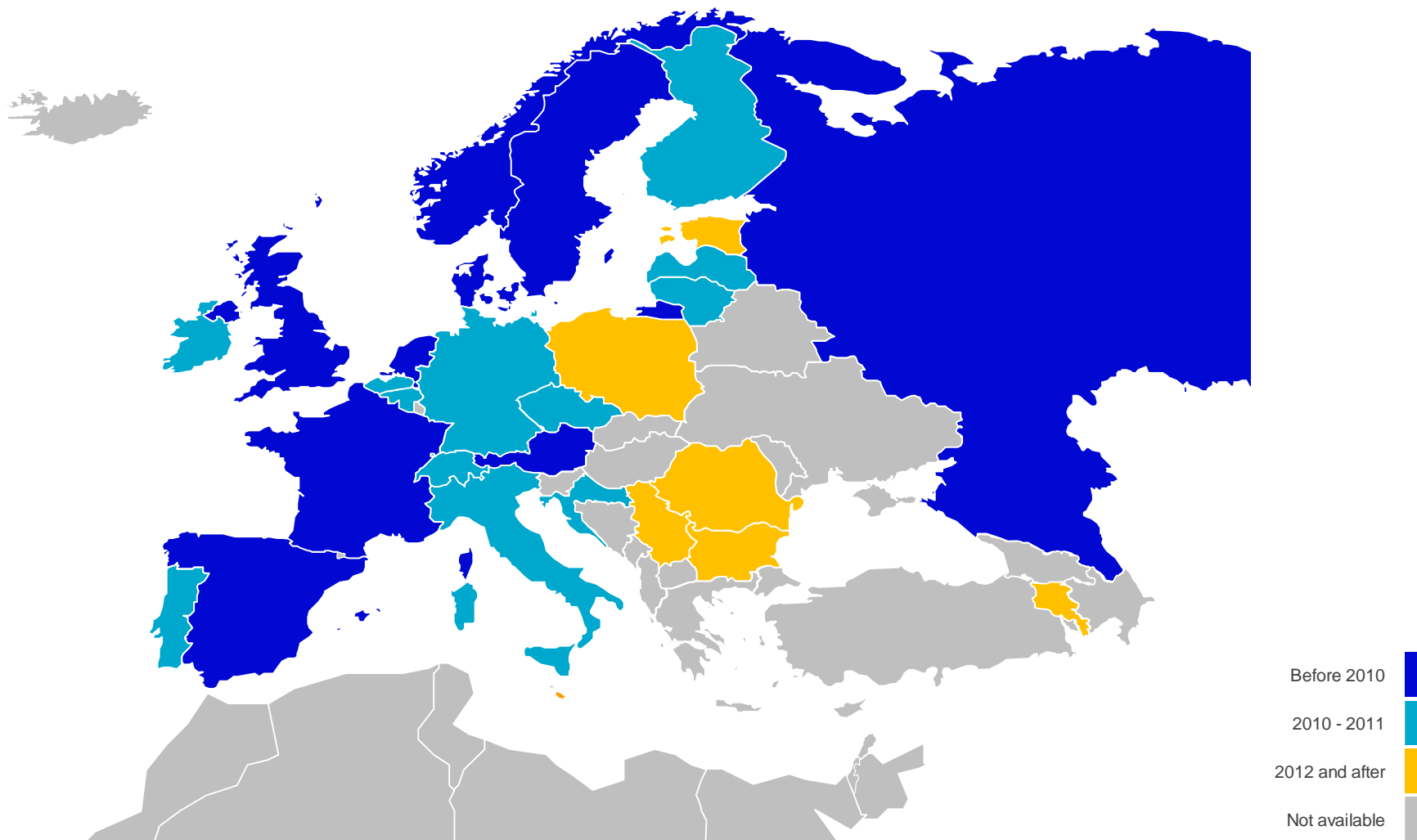
PSM NEW MEDIA: YOUTUBE

Year of launch of EBU PSM services on YouTube



PSM NEW MEDIA: APPS

Year of launch of EBU PSM apps



PSM BAROMETER 2014 - Source: EBU based on Members' Data

Number of available EBU PSM apps in 2013



BRINGING INNOVATION TO THE CITIZENS



France Culture Fictions



Dedicated Apps for Children

PSM VOD SERVICES



PSM ARE FRONTRUNNERS INNOVATORS



tve

first broadcaster to offer

telly

May
2013



francetvpluzz

among the early adopters of

chromecast

March
2014



radio
player

to launch a hybrid car adaptor

Fall
2014

PSM ARE MARKET DRIVERS



Belgium – launch December 2013



TV



Netherlands – launch June 2014



TV



UK – launch March 2011



radio



Belgium – launch April 2014



radio

PSM ARE MARKET DRIVERS

Lilyhammer



NRK

&



The Wrong Mans



&

hulu™

Ripper Street – 3rd season

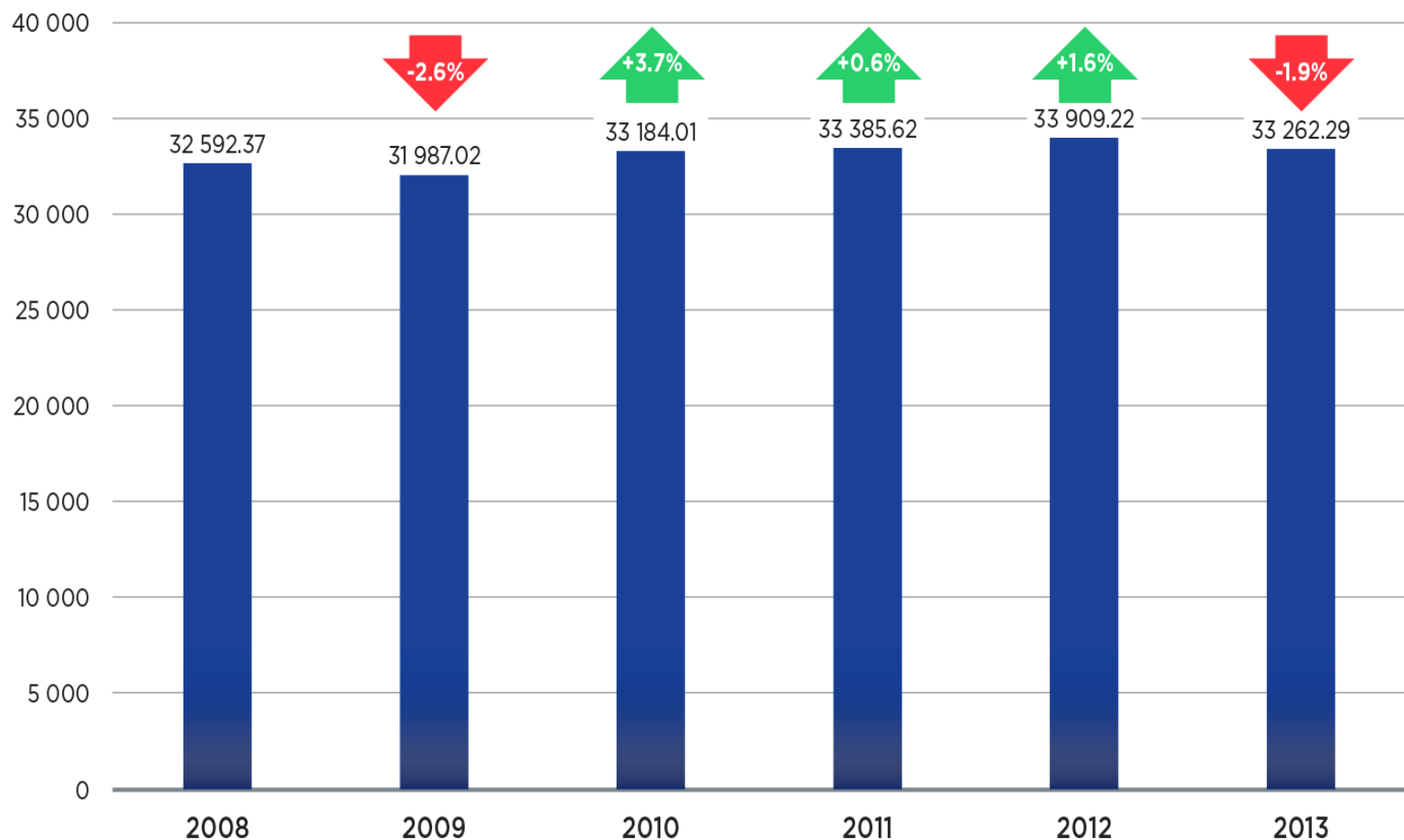


&

amazonstudios

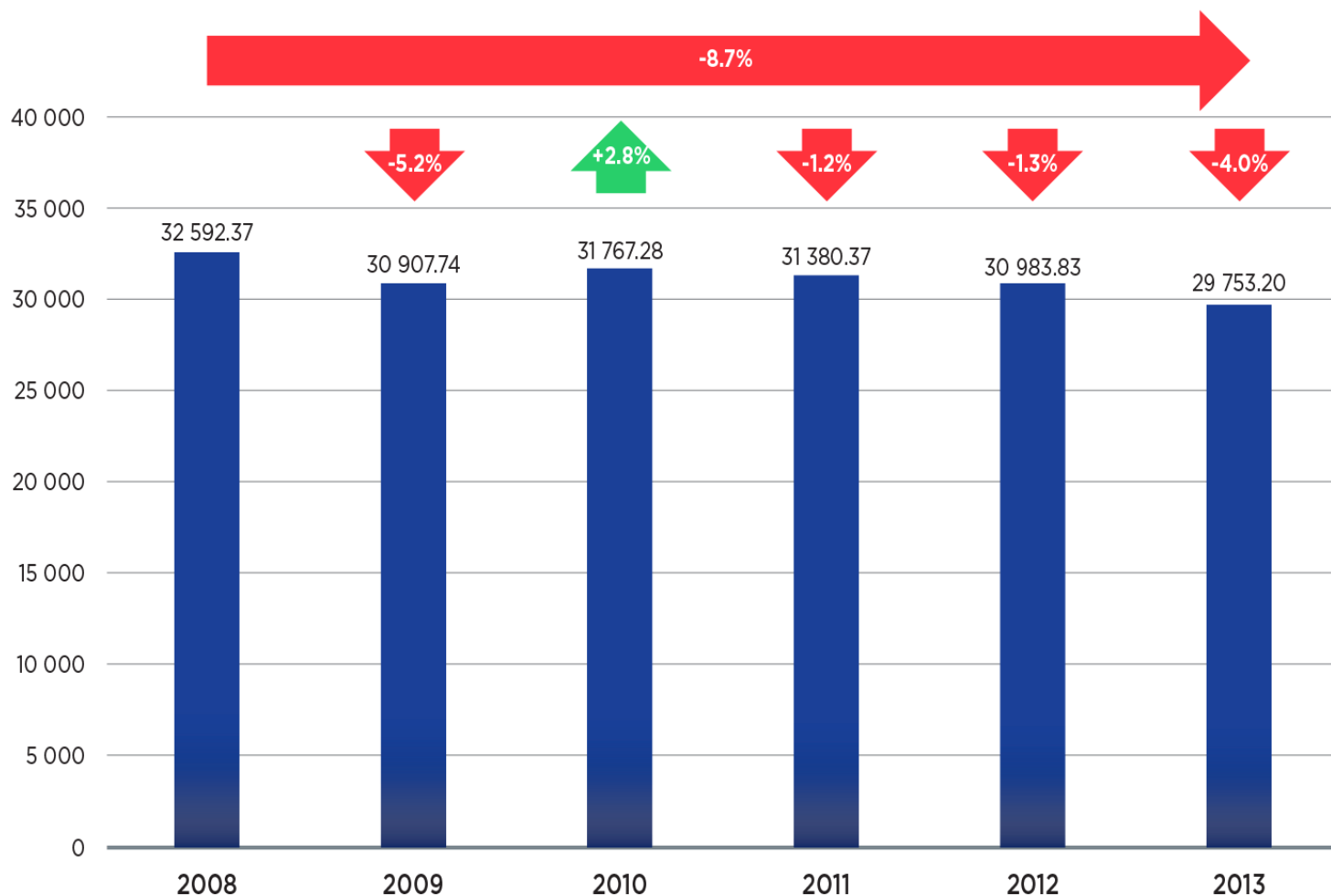
PSM COST

TOTAL PSM FUNDING IN THE EBU AREA (EUR MILLION, 2008–2013)



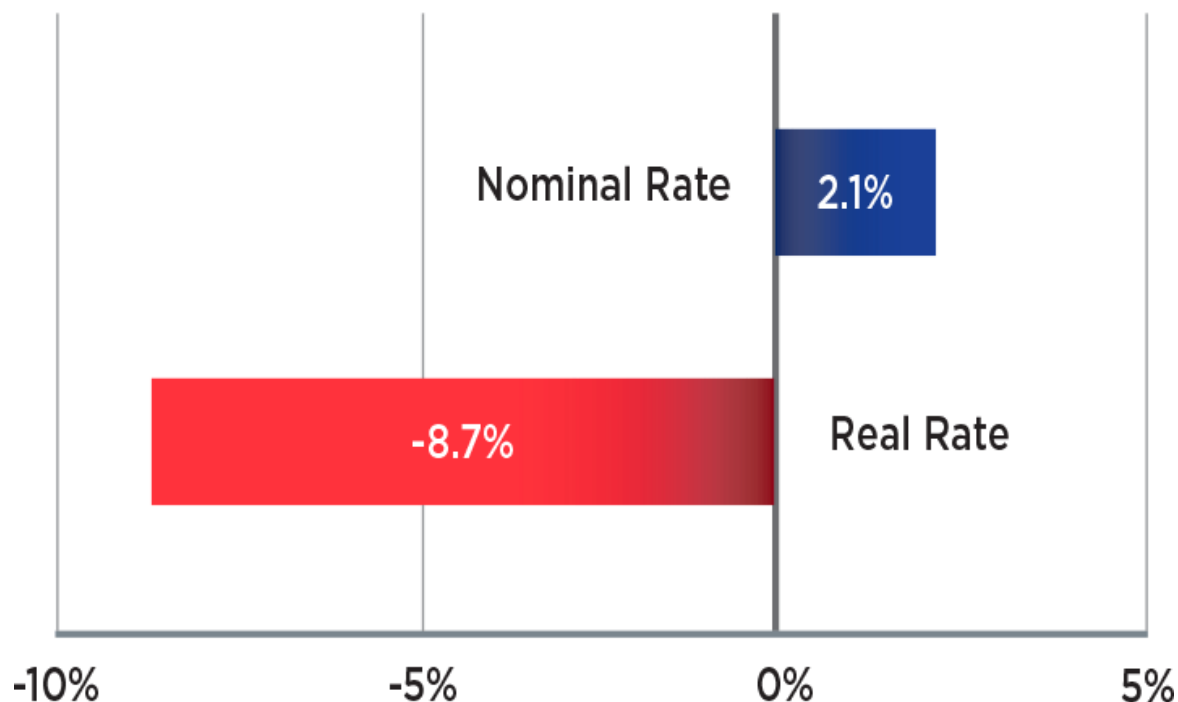
PSM COST

TOTAL PSM FUNDING IN THE EBU AREA (EUR MILLION IN 2008 CONSTANT PRICES, 2008-2013)



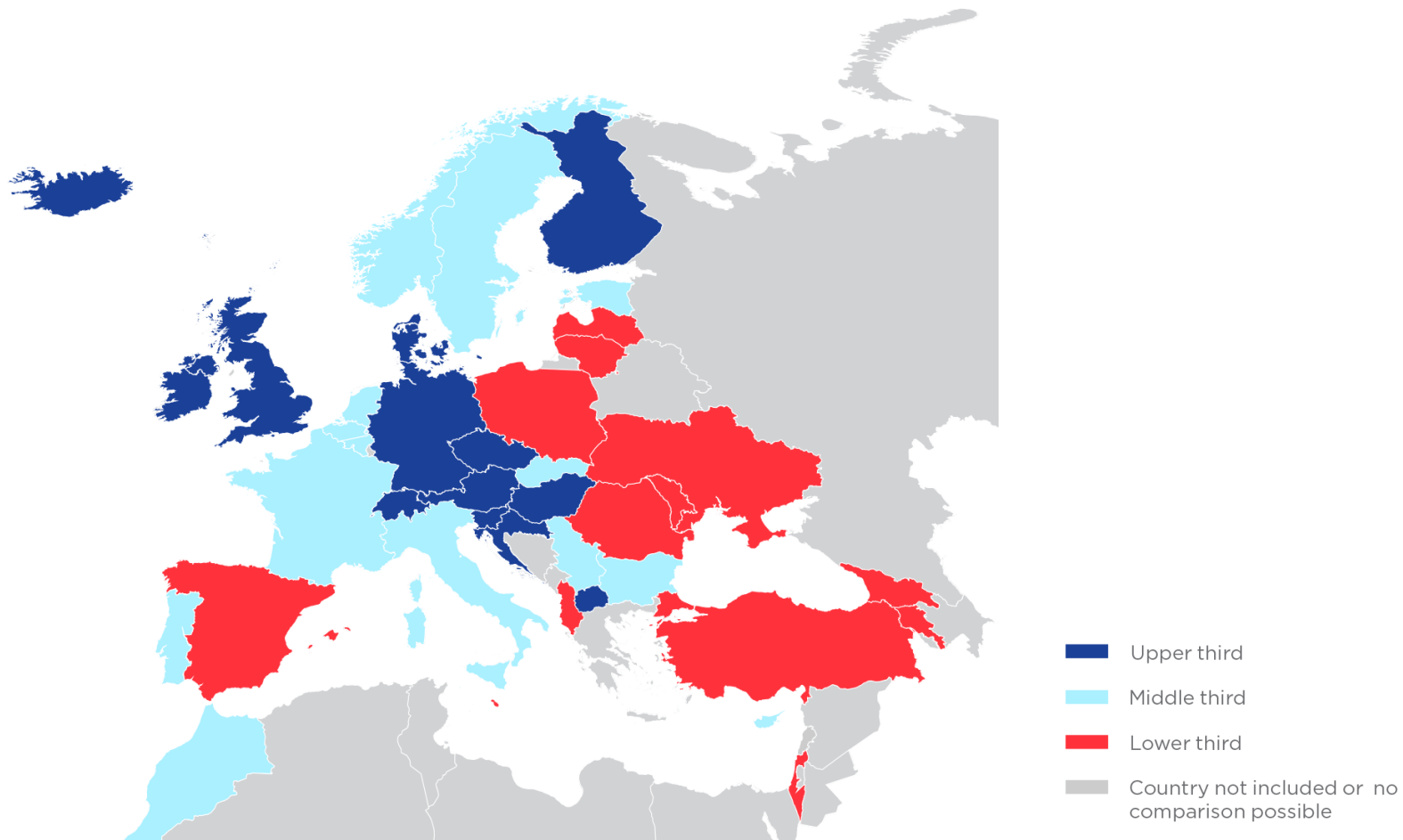
PSM COST

NOMINAL AND REAL GROWTH RATES OF TOTAL PSM FUNDING IN THE EBU AREA (2008–2013)



PSM COST

TOTAL PSM FUNDING AS % OF GDP (2013)





PSM: Be were the audience is



YOUR STRENGTHS ARE
YOUR WEAKNESSES...

BOY BOY!
WE WANT NONE OF
THESE!

AUDI ONCE
@

WE HAVE SUCH A
GOOD DISCUSSION!

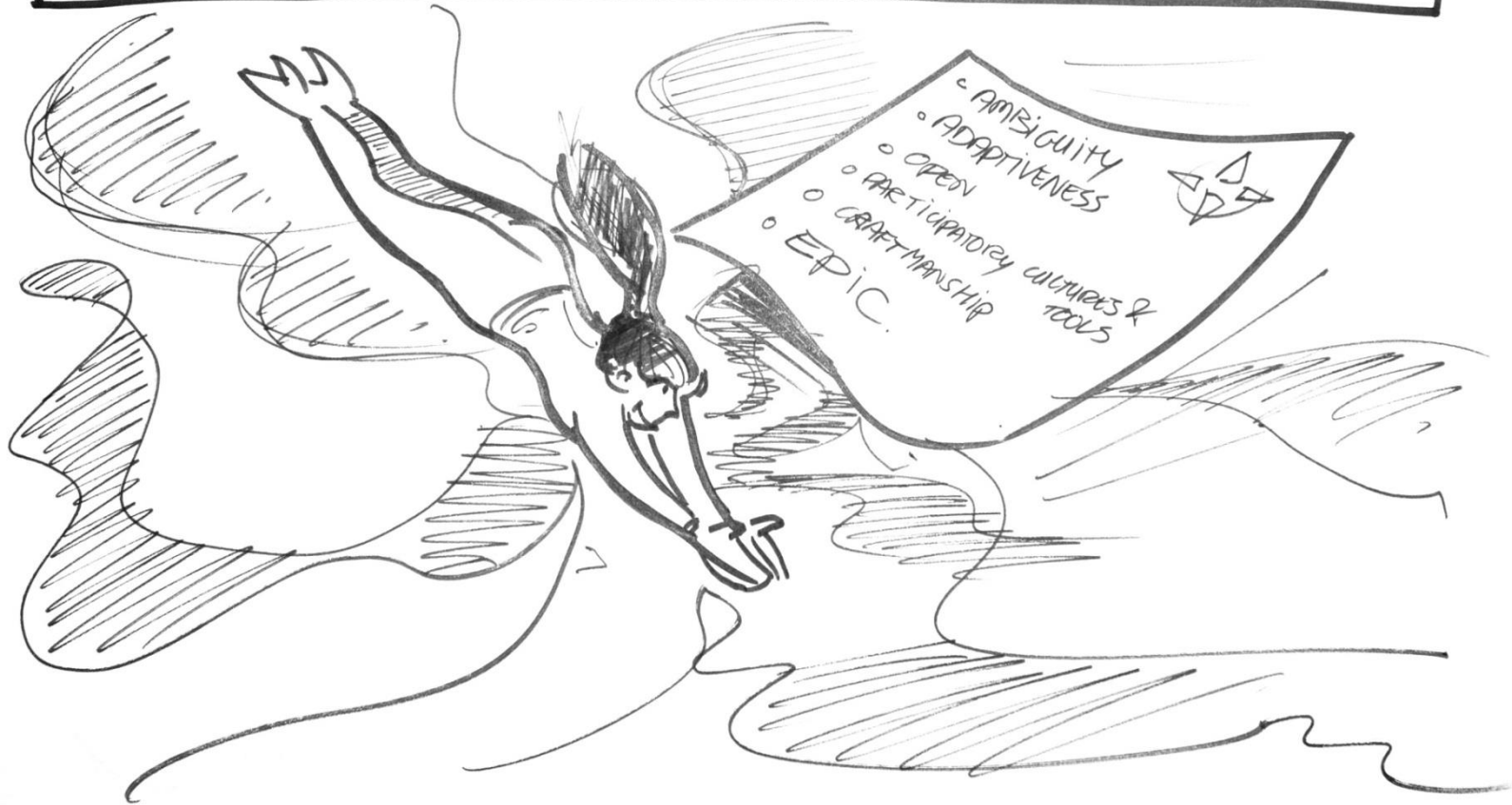
WE HAVE SO MANY
GOOD IDEAS!

I KIND OF MISS
THE WINDOWS...?

P.S.M.

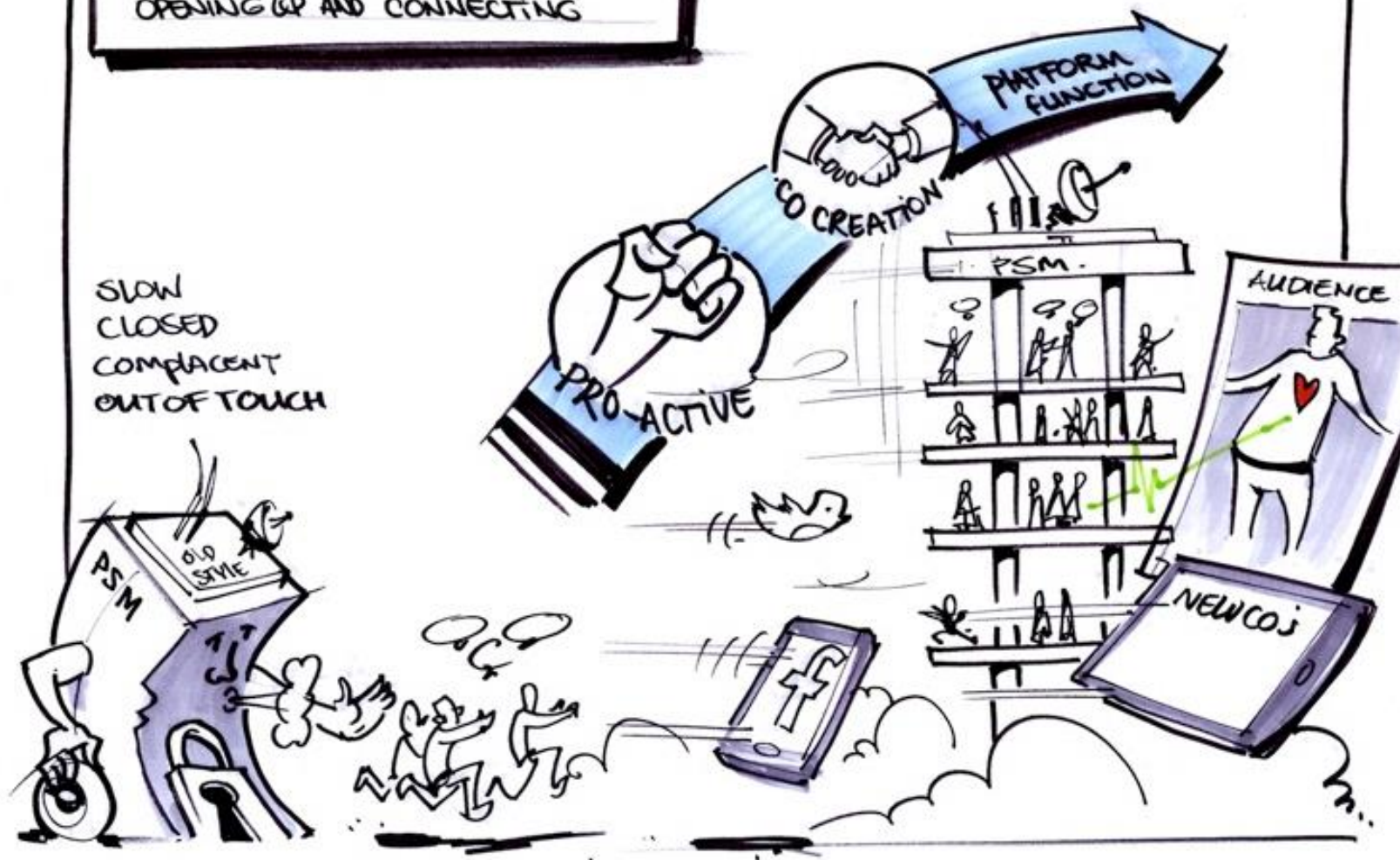
"DISRUPT YOURSELF, BEFORE SOMEBODY
ELSE DOES"

ALAN MOORE



"UNSILO PSM"

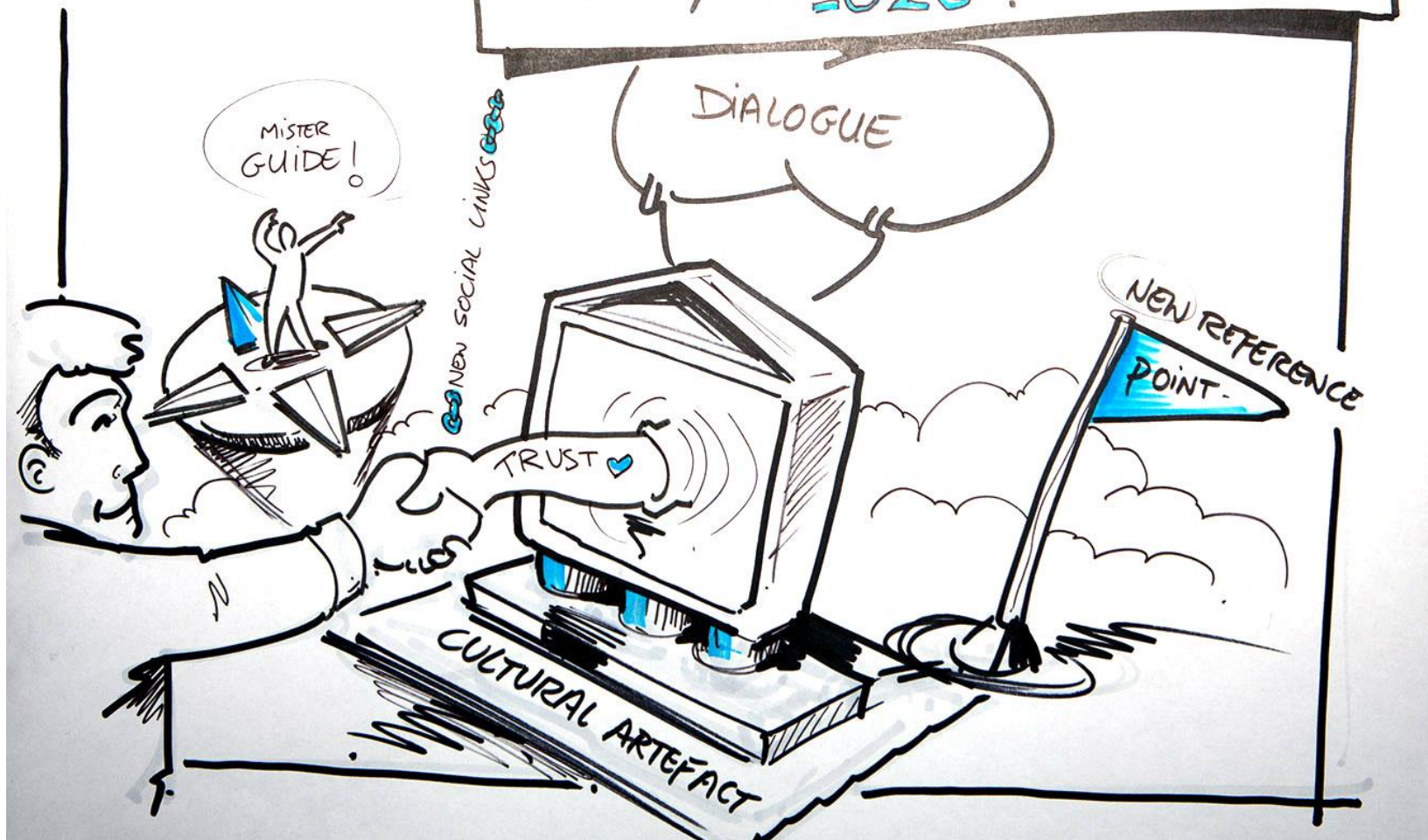
OPENING UP AND CONNECTING





#3

WHAT ROLE COULD **PSM** HAVE IN SOCIETY IN **2020**?



HR CHALLENGES

Downsizing / reorganizing
the staff structure

***Doing more with less
resources?***

Training / development /
career plan

***Do young people want
to work for us?***

Evaluation / talent
management

***How can we be efficient
and flexible?***

NEXT STEP:

PSM CONTRIBUTION TO SOCIETY



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 @_robertosuarez #EBUresearch

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