

EBU

OPERATING EUROVISION AND EURORADIO

23 APRIL 2024

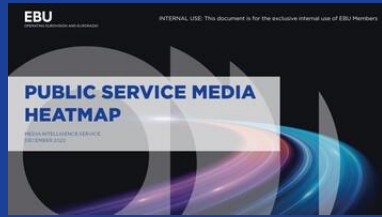
**UNDERSTANDING THE
IMPACT OF EMERGING
STREAMING MODELS ON
PUBLIC SERVICE MEDIA**

WHAT IS THE MEDIA INTELLIGENCE SERVICE (MIS)?

Market research service of the European Broadcasting Union



MIS PUBLICATIONS



HOW TO ACCESS MIS REPORTS?



RESOURCES

Search for video talks, guides, research and technical publications in the libraries below. Or discover a selection of the best resources by topic in our Knowledge Hub.

Read our [annual report](#).

VIDEO TALKS	GUIDES	RESEARCH	CASE STUDIES	TECH PUBLICATIONS
<input type="text" value="Search for:"/>	<input type="text" value="Topic"/>	<input type="text" value="Type"/>	<input type="text" value="Access"/>	
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Your search returned **102** results.

REPORT - 19 SEP 2023
Audio Essentials Members Only
This first report of its kind gives you a summary of the main European audio trends as well as a deep dive into PSM's contribution.
[Report \(Members\)](#) [Slide Deck \(Members\)](#)

REPORT - 11 SEP 2023
Children and Public Service Media Members Only
Public service media (PSM) are key contributors to the kid's content industry.
[Report \(Members\)](#) [Slide Deck \(Members\)](#)

MEDIA INTELLIGENCE SERVICE TEAM



Florence Hartmann
Head of MIS



Funding of PSM
Market trends



Léa Besson
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Online platforms
Online consumption
AI



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Senior analyst - Audience
Measurement lead



Audience measurement
Audience trends
Young audience and kids



Will Davies
Senior analyst



Media markets and
competition
Sport



Matthieu Rawolle
Senior analyst



Radio and audio
Music



Dorien Verckist
Senior analyst



Impact and public value of PSM
Diversity and inclusion
News and trust



Léa Hermen
Visiting researcher



Video content
Production and
commissioning trends



Charlotte Perrot
Business development



MIS marketing and
communication

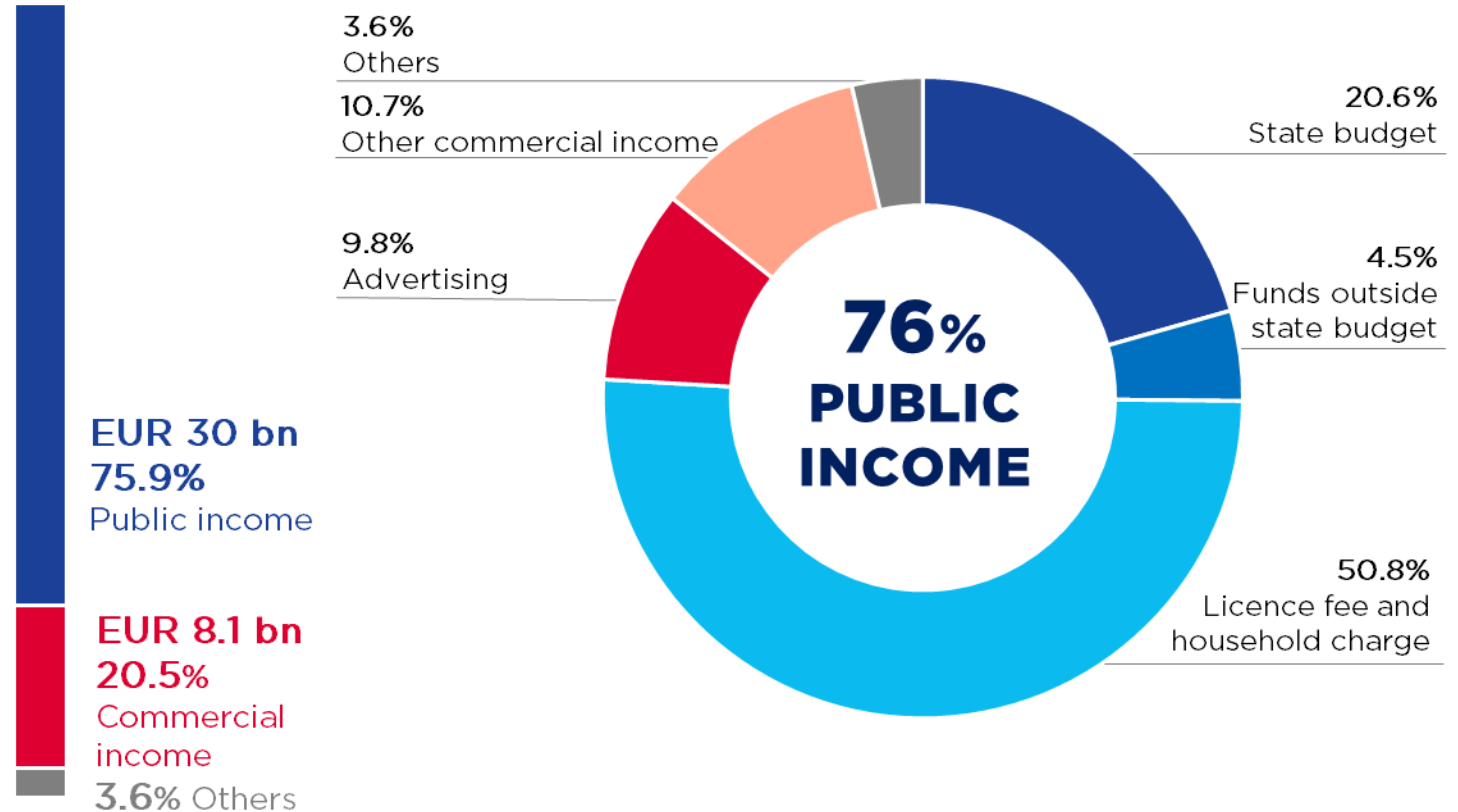
PSM FUNDING HAS SEEN A REAL RATE DECLINE

10-YEAR NOMINAL AND REAL GROWTH RATES OF PSM OPERATING REVENUES IN EBU AREA (% , 2013-2022)

2013-2022 PSM REAL RATE

-5.8%

PSM FUNDING MIX IN THE EBU AREA (% , 2022)



Notes: based on 65 organizations in 48 markets. Funding mix based on the sum of the revenues, before the intra-group eliminations.

Source: EBU based on Members' data.

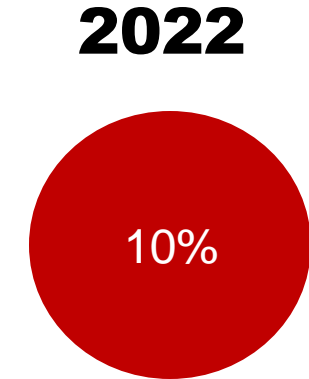
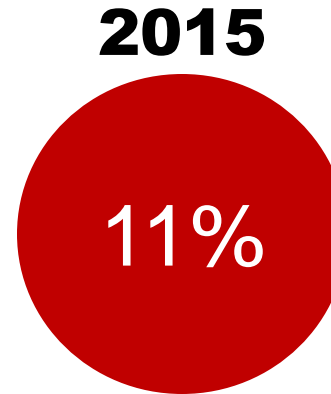
EBU Media Intelligence Service – Understanding The Impact Of Emerging Streaming Models On Public Service Media

COMMERCIAL INCOME SOURCES ARE DIVERSIFYING

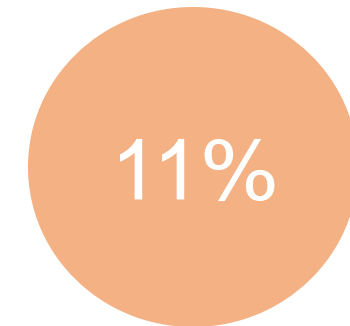
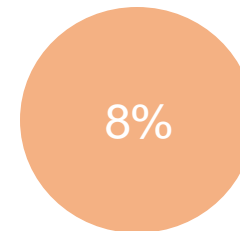
PSM COMMERCIAL SOURCES OF INCOME WITHIN PSM FUNDING MIX IN THE EBU AREA

(%, 2015-2022)

ADVERTISING



OTHER COMMERCIAL INCOME



Notes: based on 65 organizations in 48 markets. Funding mix based on the sum of the revenues, before the intra-group eliminations.

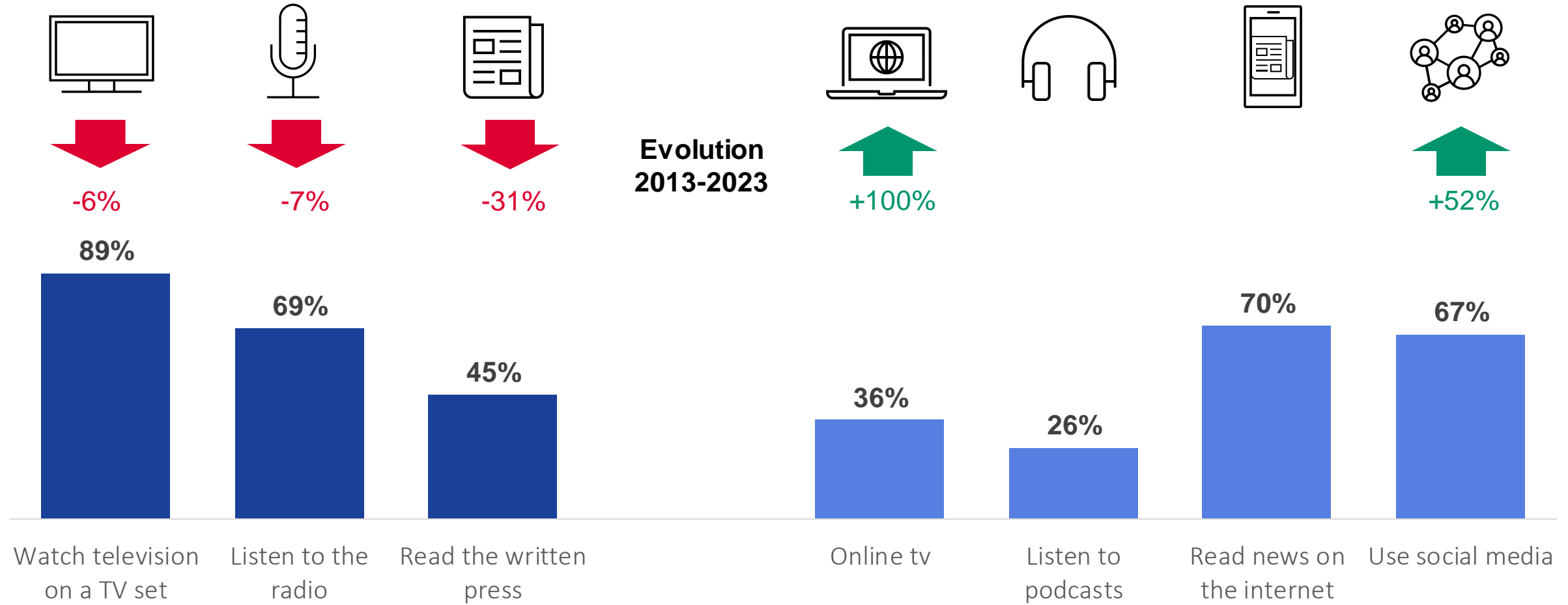
Source: EBU based on Members' data.

EBU Media Intelligence Service – Understanding The Impact Of Emerging Streaming Models On Public Service Media

TRADITIONAL MEDIA CONSUMPTION FALLING AND ONLINE MEDIA GROWING



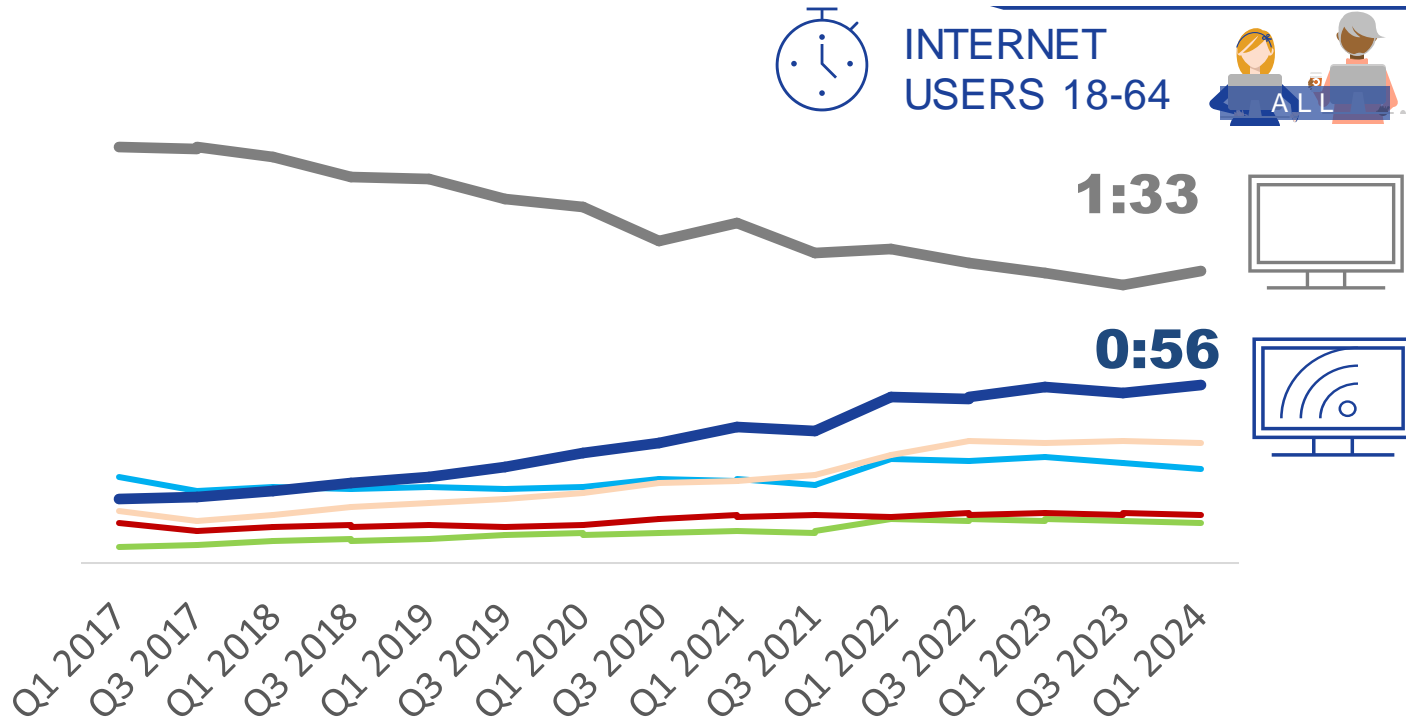
REGULAR USERS 15+ BY MEDIA IN EU – AT LEAST ONCE A WEEK



TIME SPENT WATCHING VIDEO ON SMART TVs IS STILL RISING

DAILY TIME SPENT WATCHING CONTENT ON DEVICES

In hours and minutes for internet users – Evolution Q1 2017-Q1 2024 – 12 European countries



YOUTH

INTERNET USERS 18-24

4th

most popular device for watching video



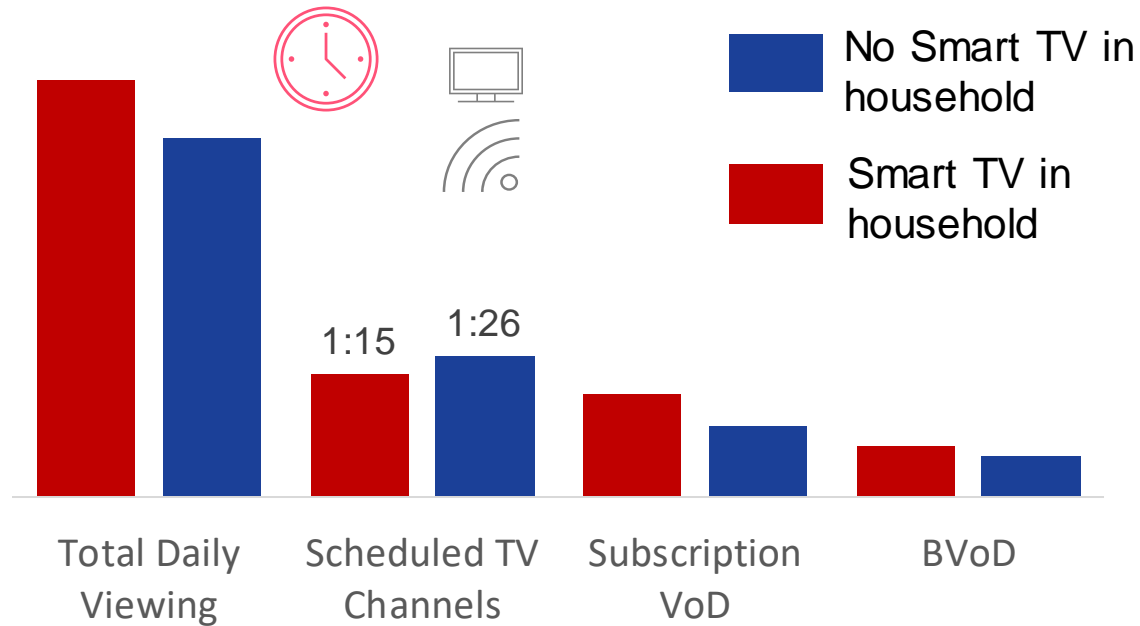
Source: EBU based on Ampere Consumer Survey - 9 countries: Denmark, France, Germany, Italy, Netherlands, Poland, Spain, Sweden, UK, based on a nationally representative, online sample of 18 to 64 year olds in each market.

EBU Media Intelligence Service – Understanding The Impact Of Emerging Streaming Models On Public Service Media

WHEN PEOPLE HAVE A SMART TV, THEY WATCH LESS SCHEDULED TV....

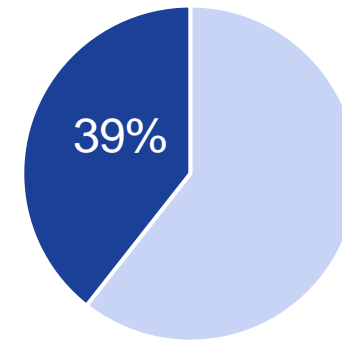
AVERAGE DAILY VIEWING TIME BY SERVICE TYPE

In hours / min – 14 European countries, Q1 2024

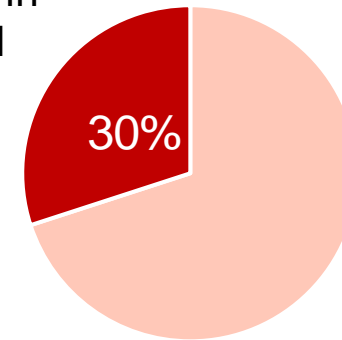


VIEWING SHARE TO SCHEDULED CHANNELS

No Smart TV in household



Smart TV in household



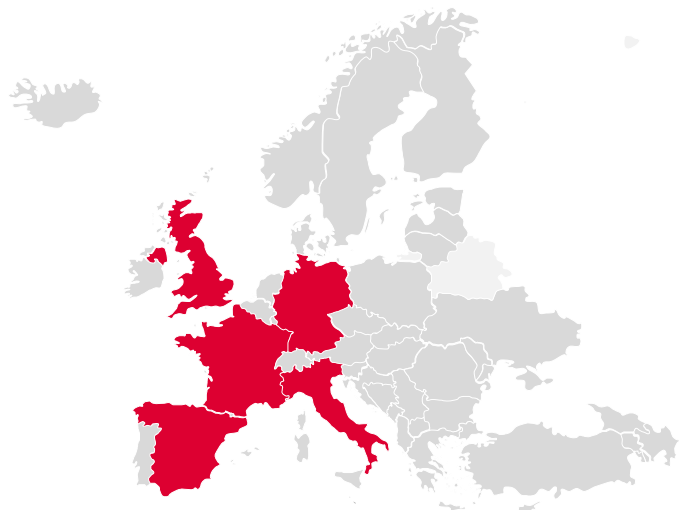
Source: Ampere Consumer, 14 countries: Denmark, Finland, France, Germany, Italy, Netherlands, Norway, Poland, Spain, Sweden, UK, based on a nationally representative, online sample of 18 to 64 year olds in each market.

SVOD AD TIERS

NETFLIX

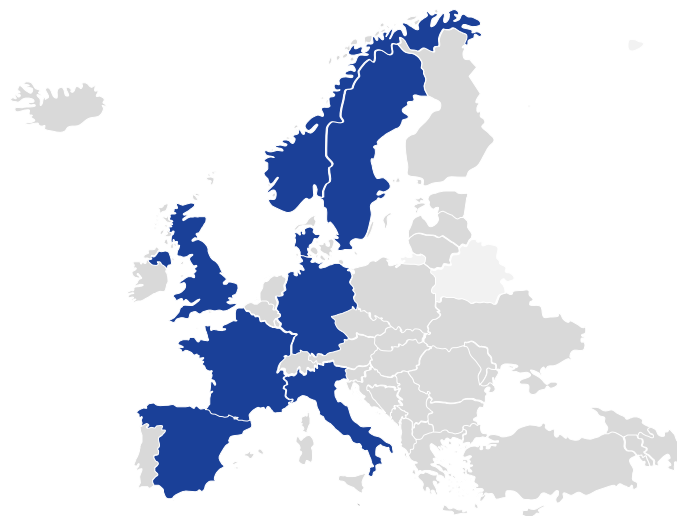
November 2022

France, Germany, Italy,
Spain, UK



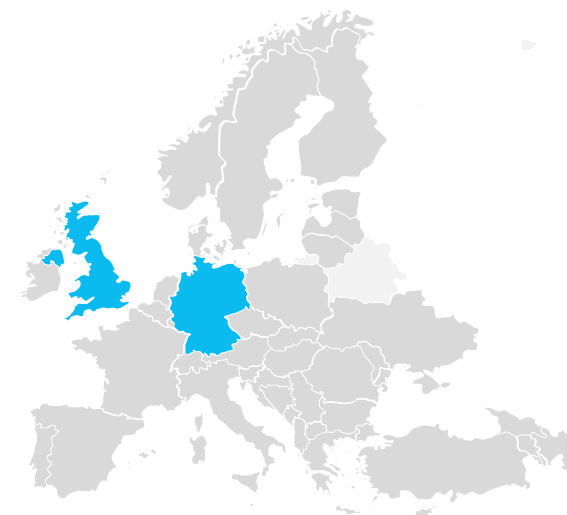
November 2023

Denmark, France, Germany,
Italy, Norway, Spain, Sweden,
Switzerland, UK



March 2024

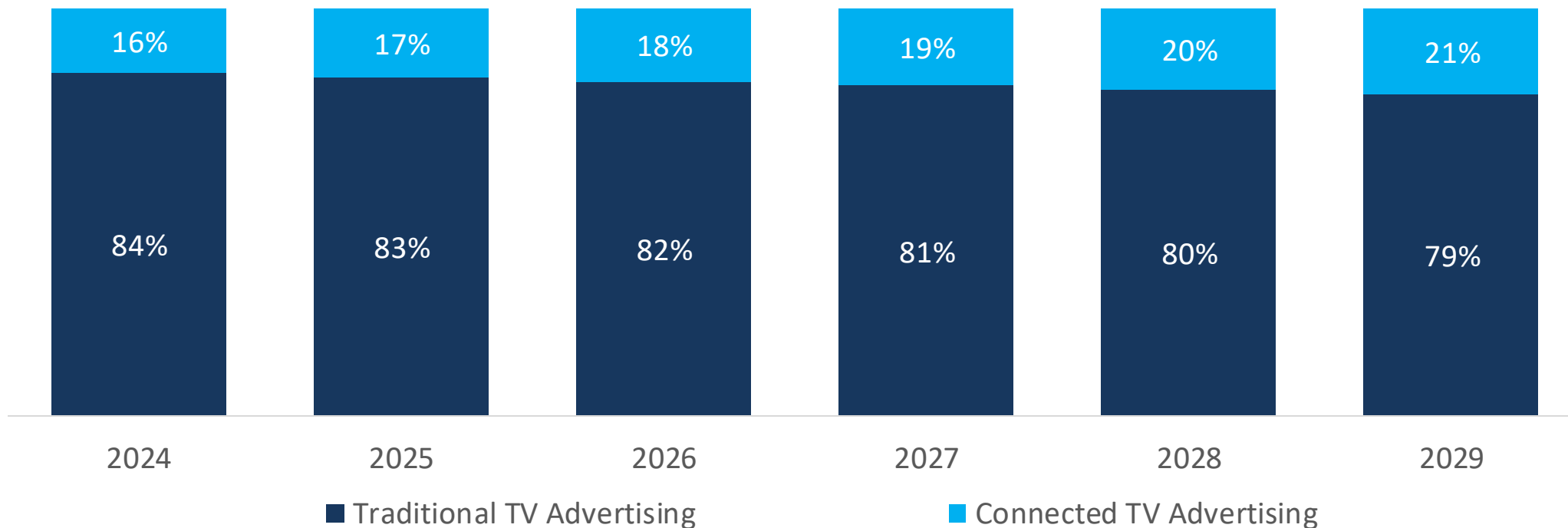
Germany, UK



THE SHARE OF CONNECTED TV ADVERTISING IS FORECAST TO GROW



SHARE OF TV ADVERTISING (%, 2024-2029)



2024-2028
(% change)

+21%

-8%



PSM CONSIDERATIONS

DEVELOP CONNECTED TV / ADDRESSABLE ADVERTISING SOLUTIONS

In-house



Partnership



FAST SERVICES AND CHANNELS HAVE EMERGED IN THE EUROPEAN MEDIA LANDSCAPE



pluto 



2014



2018



SAMSUNG
TV Plus

2015

2020



LG Channels



2020

ROKU
Channel

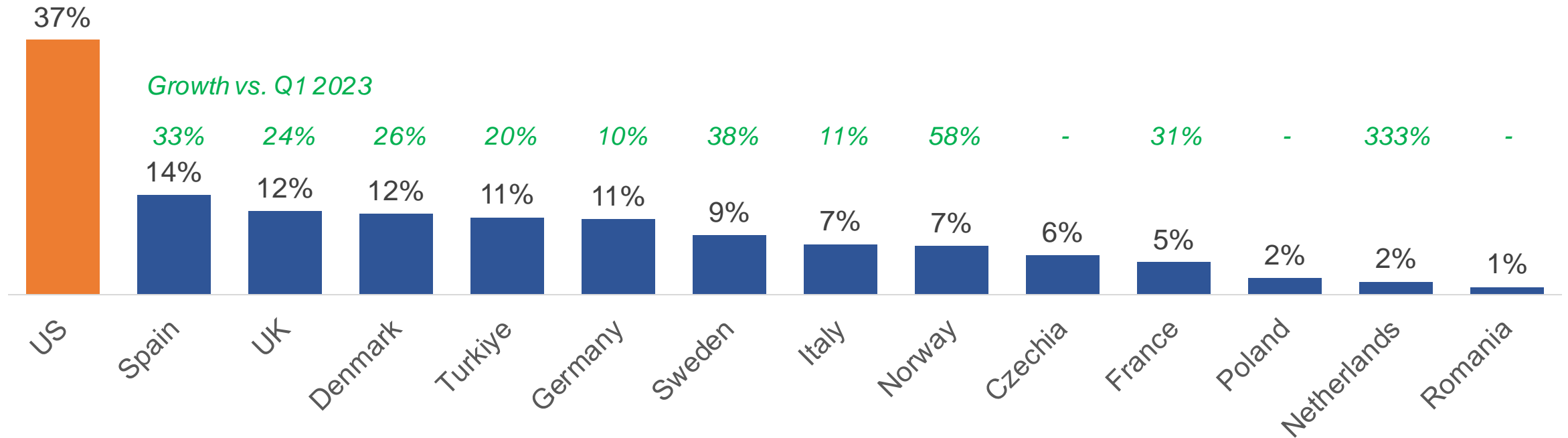
Source: EBU based on Omdia and desk research

EBU Media Intelligence Service – Understanding The Impact Of Emerging Streaming Models On Public Service Media

FAST SERVICE PENETRATION AND USAGE HAS BEEN GROWING IN EUROPE HOWEVER, IT IS STILL SOME WAY BEHIND THE US

INTERNET USERS WHO HAVE USED A FAST* SERVICE IN THE LAST MONTH (% OF SEGMENT)

Q1 2024



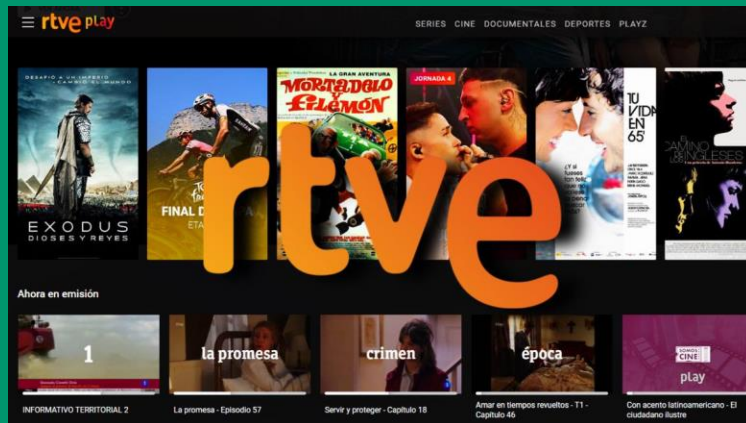
Source: EBU based on Ampere Consumer Survey, based on a nationally representative, online sample of 18 to 64 year olds in each market. *FAST services tracked in European markets: Amazon Freevee, Joyn, Mango, Pluto TV, Samsung TV Plus, Roku, wedotv. N.B. Freevee / Roku only measured from Q1 2023 in Germany



PSM CONSIDERATIONS

DEVELOP FAST CHANNELS STRATEGY

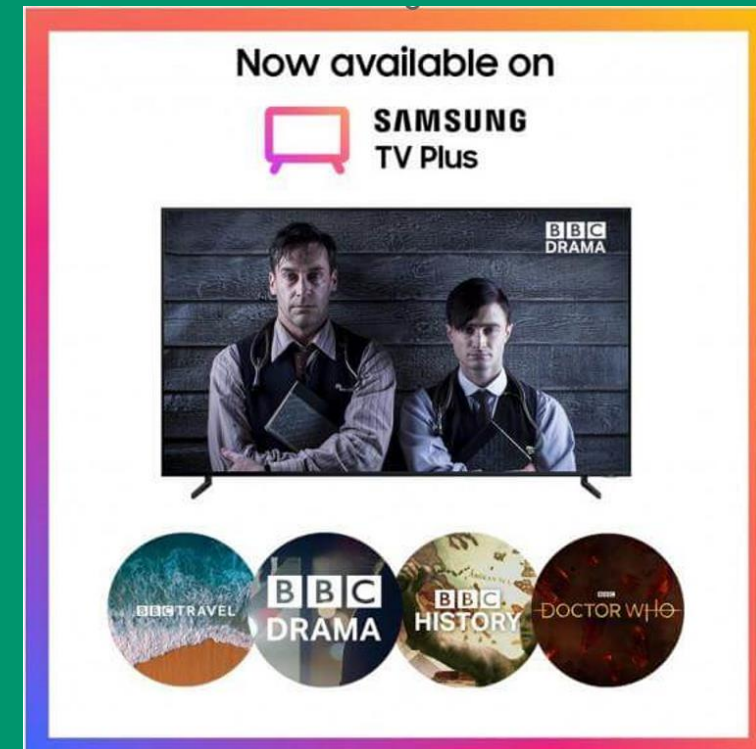
FAST Channels on PSM VOD platform



FAST Channels to reach streamers on other platforms



International FAST channel launches



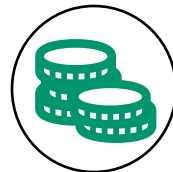
SUMMARY



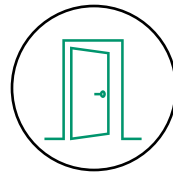
The real rate of PSM funding is declining and commercial income sources are becoming more important



Media consumption behaviours are changing, driven in part by the adoption of Smart TVs and the growth of online video



These evolving behaviours have led to the emergence of new business models in the media landscape



Two of the new business models – the introduction of SVOD ad-tiers and the emergence of FAST channels – present a challenge to EBU Members.....but also an opportunity

**SCAN TO REGISTER TO
MIS ALERTS & NEWSLETTERS**

