



EBU

OPERATING EUROVISION AND EURORADIO

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UPDATE: COVID-19 CRISIS

PSM AUDIENCE PERFORMANCE

PUBLIC VERSION

MEDIA INTELLIGENCE SERVICE

APRIL 2020

ABOUT THIS REPORT

This report aims to provide an overview of the impact of coronavirus COVID-19 disease sweeping across Europe at the start of 2020 and how Public Service Media (PSM) are responding to the challenge of keeping citizens informed as this unprecedented crisis develops.

This is an urgency report to respond to these exceptional times for which we are lacking references. In this sense, it looks at news, core of what PSM deliver.

By doing this, the European Broadcasting Union shows external stakeholders both the actions taken by public service broadcasters across Europe to support citizens during this crisis, and the response of the citizens to that programming to tackle the coronavirus COVID-19 challenge.

On the 31 March 2020 the global confirmed cases stood at over 800 000 cases, 55% of them in the countries where the EBU has Members. Italy, Spain, Germany and France were the countries with the highest number of cases within the EBU area.

METHODOLOGY

GLOBAL CONTEXT

Desk research to provide an overview of the state of crisis across the EBU Area. Using key sources from the [WHO situation reports](#) and latest data on global cases from the [Johns Hopkins University \(JHU\) dashboard](#).

NEWS AND CRISIS CONTENT PERFORMANCE

In collaboration with the GEAR network, the MIS team has collected updated data on the recent performance of EBU PSM main news broadcasts on TV and performance of online news services when available. And for a selected number of markets Radio data was also available.

This second data collection took place over 1 - 8 April 2020. Providing complete Q1 data, comparing January - March 2020 with the same period in 2019, and with a focus on peak crisis month March 2020.

Thank you to our colleagues across all 27 PSM organizations that supported us by providing data on a very short deadline for this data collection.

PSM social media data is based on publicly available data extracted from Fanpage Karma.

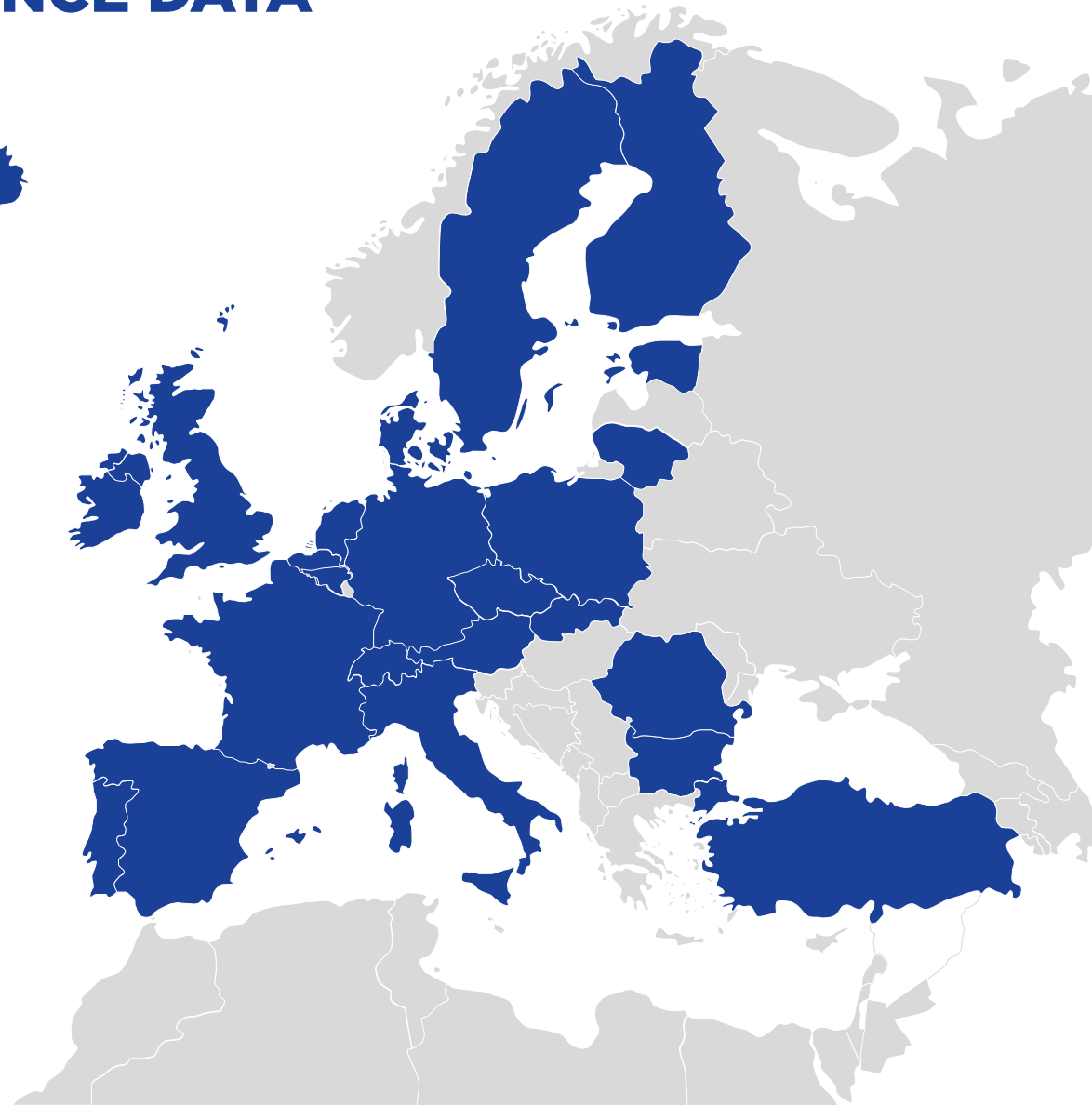
MARKETS PROVIDING AUDIENCE DATA



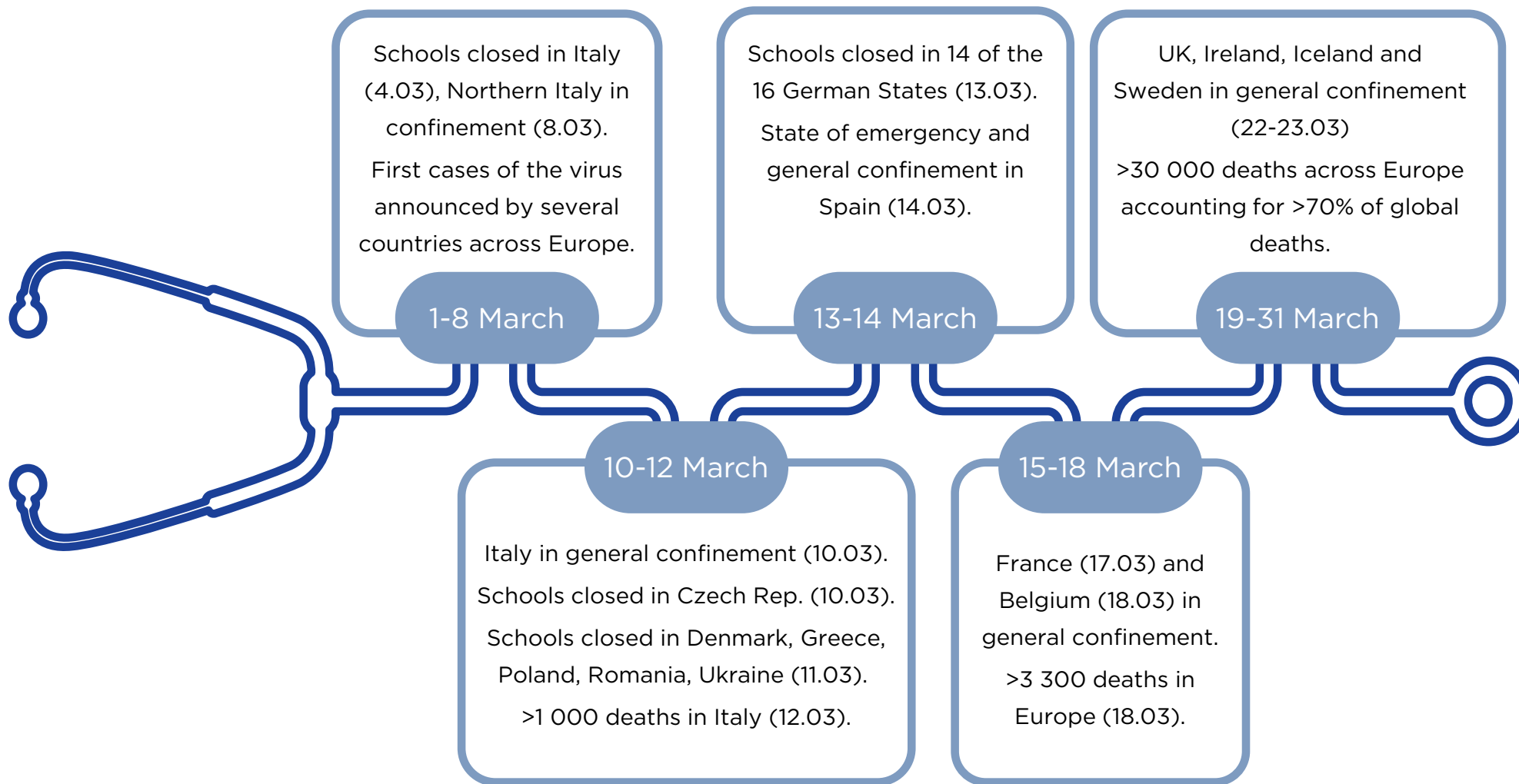
27 EBU PSM ORGANIZATIONS

PROVIDED DATA ON THE PERFORMANCE OF THEIR BROADCAST AND ONLINE NEWS SERVICES

Austria ORF, Belgium FL VRT, Belgium FR RTBF, Bulgaria BNT, Czech Republic CT, Denmark DR, Estonia ERR, Finland Yle, France France TV & Radio France, Germany ARD and ZDF, Iceland RÚV, Ireland RTÉ, Italy RAI, Lithuania LRT, Netherlands NPO, Poland TVP, Portugal RTP, Romania TVR, Slovakia RTVS, Spain RTVE, Sweden SR & SVT, Switzerland SRG SSR, Turkey TRT, United Kingdom BBC.



VIRUS ESCALATION IN EUROPE AT UNPRECEDENTED PACE



Source: EBU based on public information. For presentation reasons, country information is non exhaustive and covers selected countries only.

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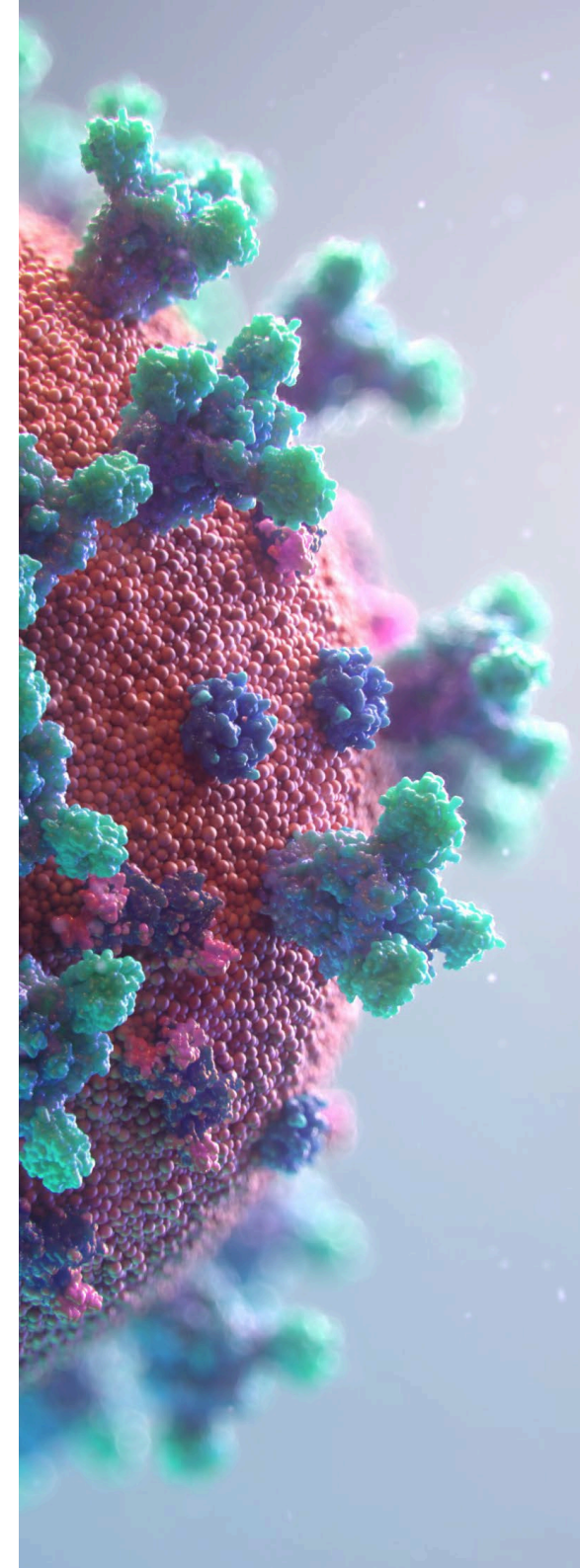
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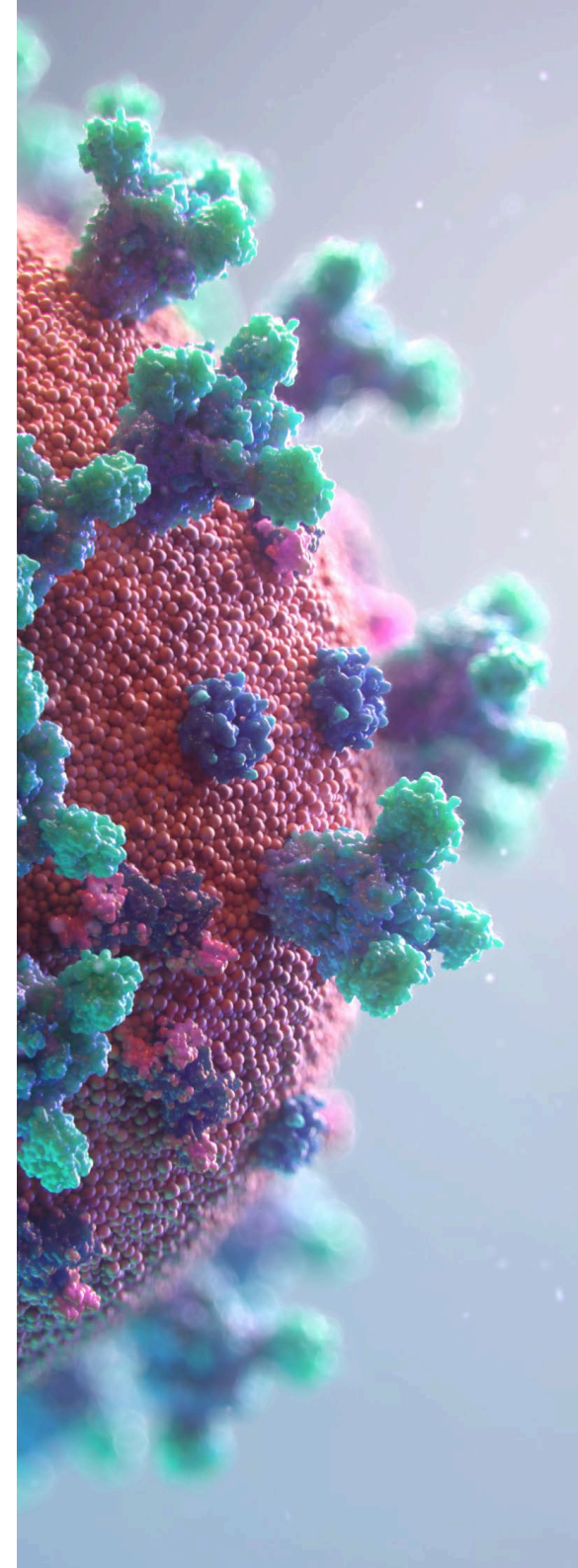
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PSM TV NEWS AUDIENCE

EBU PSM organizations broadcast news updates throughout the day on their main TV channels and dedicated 24-hour news channels, providing citizens with real time reliable information on the evolving COVID-19 crisis.

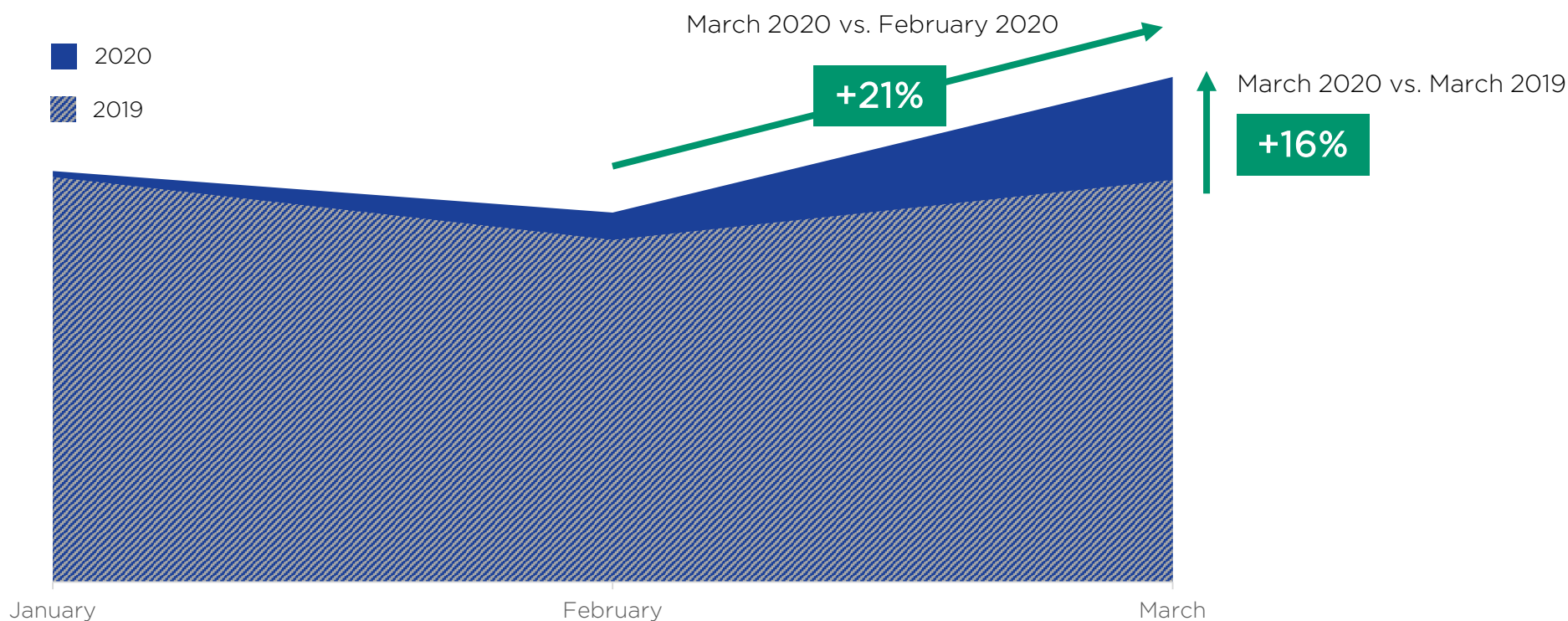
This section looks at how citizens have tuned into this increased PSM news offer during this crisis period. The focus is on the **main evening news bulletins** of PSM to provide a comparable evolution of TV news consumption over the crisis period.



PSM KEEP CITIZENS INFORMED BY INCREASING NEWS AND INFORMATION CONTENT IN TIMES OF CRISIS

PSM across Europe increased news and information hours in their schedules in March in order to keep citizens informed of ongoing developments. Information was provided through additional and extended news bulletins, as well as dedicated coronavirus current affairs shows and talk shows.

Total hours News and information content (including news bulletins, current affairs and talk shows) by month



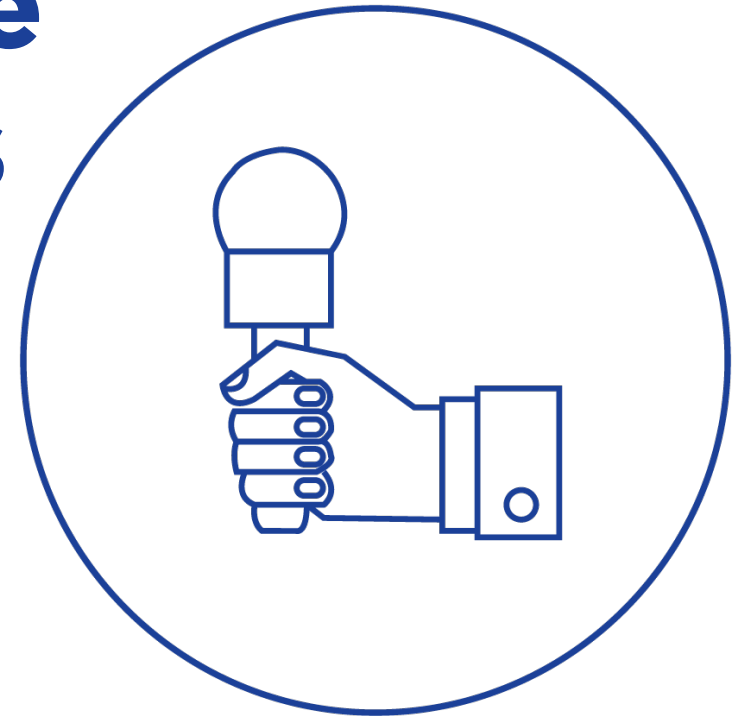
Reach of PSM evening news up to x2.5 the average during peak days of COVID-19 crisis

in the most affected markets, on days where key announcements were made; declared state of emergency, restriction of movements, etc.

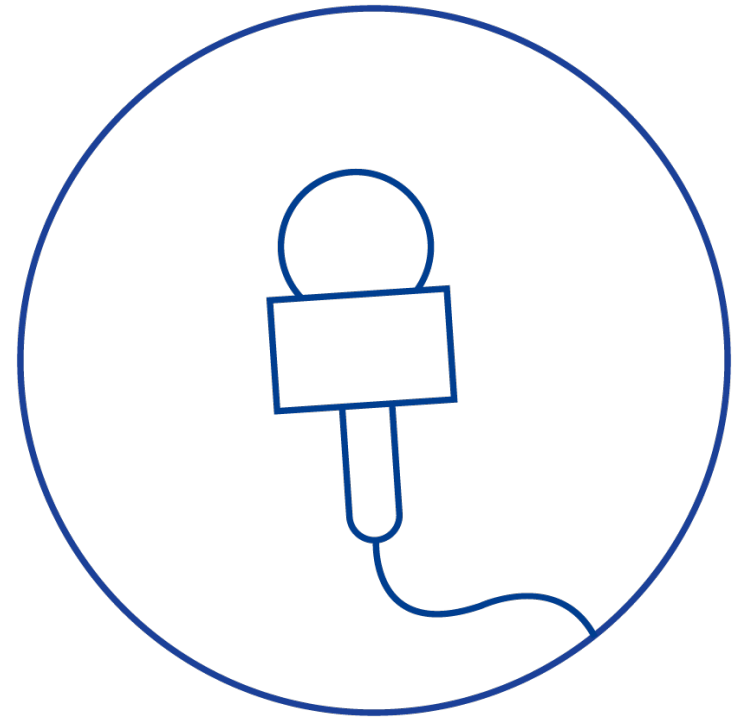


Citizens turning more to PSM evening news in times of crisis:

daily viewing **+20%**
on average



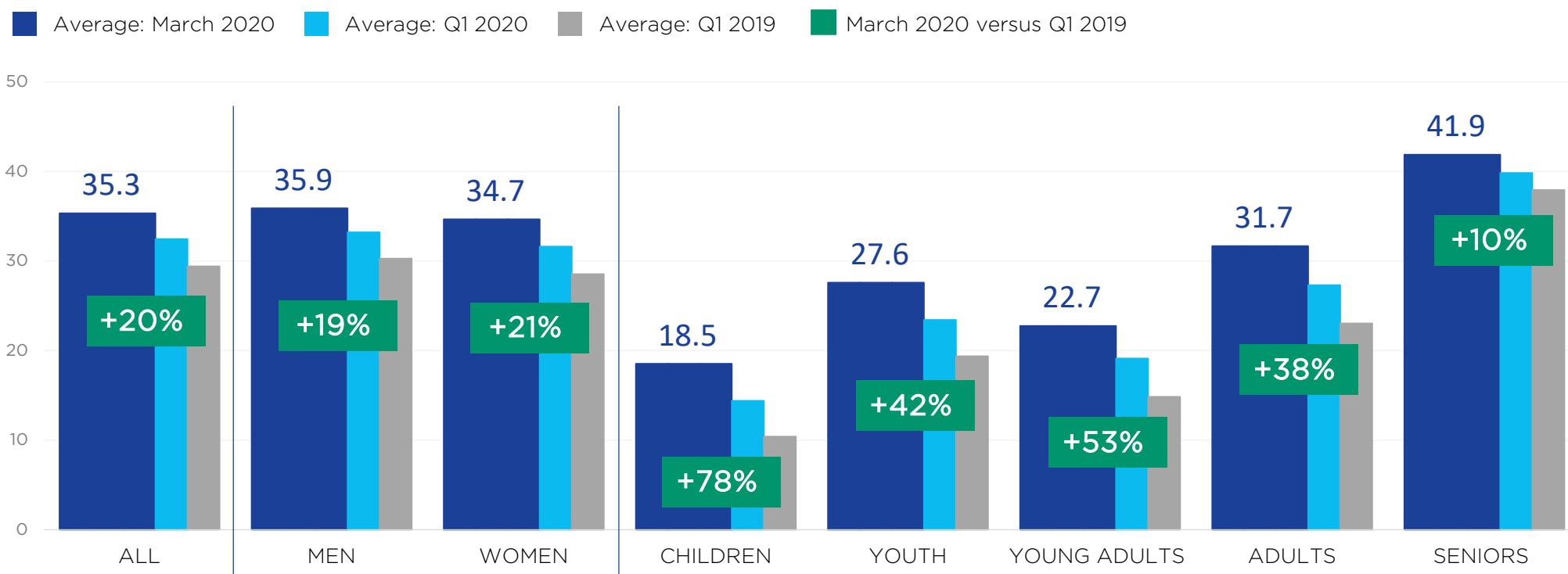
**Young citizens
turning more to
PSM evening news
in times of crisis:
daily viewing **+42%**
on average**



PSM EVENING NEWS GROWS ACROSS ALL DEMOGRAPHICS

The start of the COVID-19 crisis saw younger viewers turning to PSM evening TV news bulletins for trustworthy updates on key announcements in their countries as well as developments across the globe.

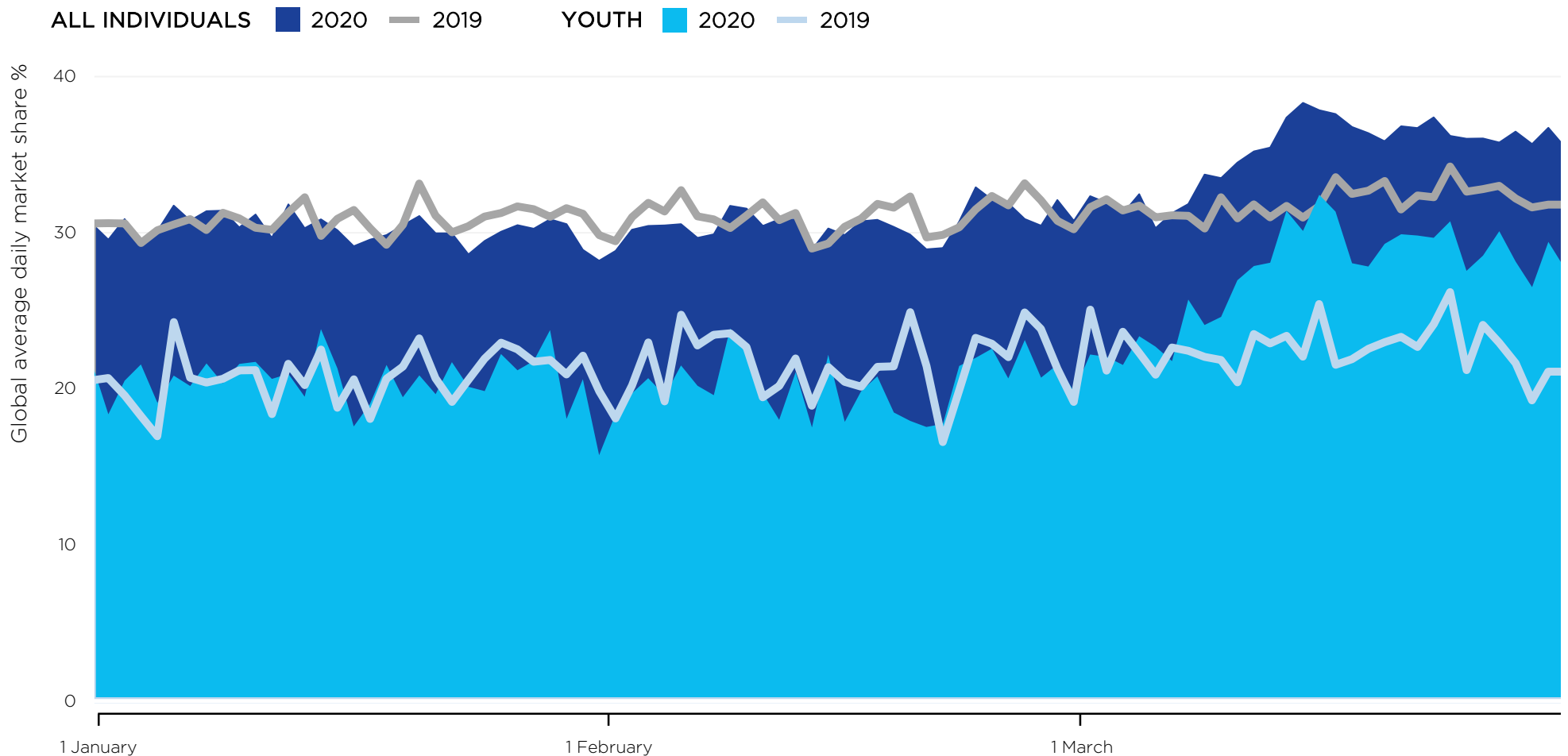
Average daily Viewing Share (%) of PSM Evening News by target groups



Age definitions: Children 4-14, Youth 15-24, Young Adults 25-34, Adults 35-59, Seniors 60+. Definitions may vary slightly by country.

THE MORE DRAMATIC THE CRISIS BECOMES, THE MORE CITIZENS TURN TO PSM TV

As the COVID-19 crisis worsens PSM evening news becomes indispensable, across the organizations measured viewing shares for the latest week are the strongest yet, with a steep uplift among youth.



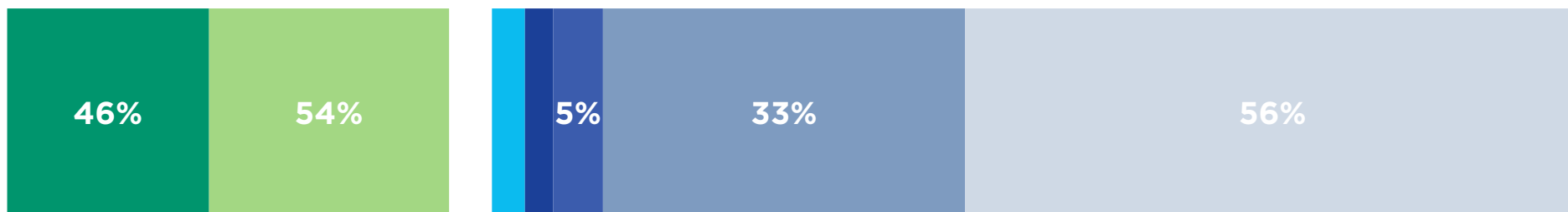
Source: EBU based on Members' data from 27 organizations, Youth 15-24 definitions may vary slightly by country.

VIEWER PROFILE (%) OF PSM EVENING NEWS

At the start of 2020, PSM evening news continued to deliver a similar profile to that of the previous year, but as the COVID-19 crisis began to develop the number of younger viewers is slightly shifting the viewer profile.

■ MEN ■ WOMEN ■ CHILDREN ■ YOUTH ■ YOUNG ADULTS ■ ADULTS ■ SENIORS

Average: March 2020



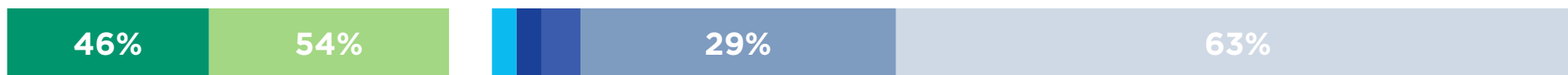
11% of viewers under 35-year olds

Average: Q1 2020



10% of viewer under 35-year olds

Average: Q1 2019



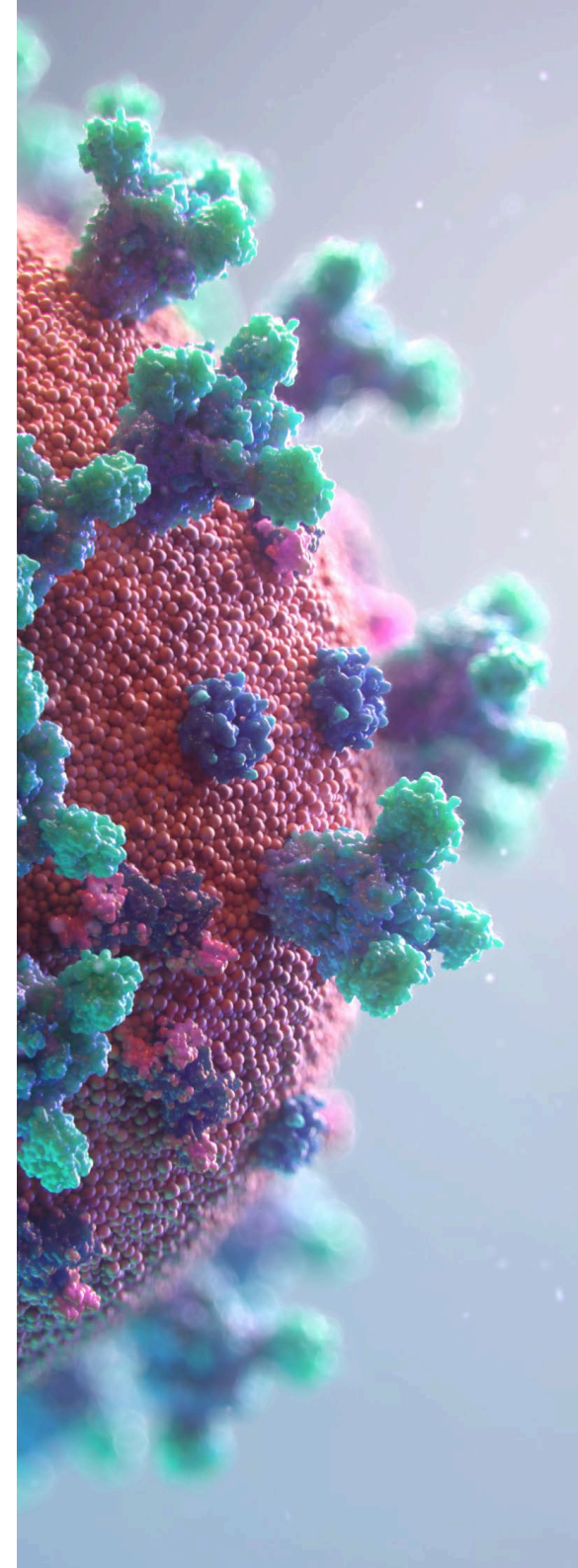
8% of viewer under 35-year olds

Age definitions: Children 4-14, Youth 15-24, Young Adults 25-34, Adults 35-59, Seniors 60+. Definitions may vary slightly by country.
No data label below 5%

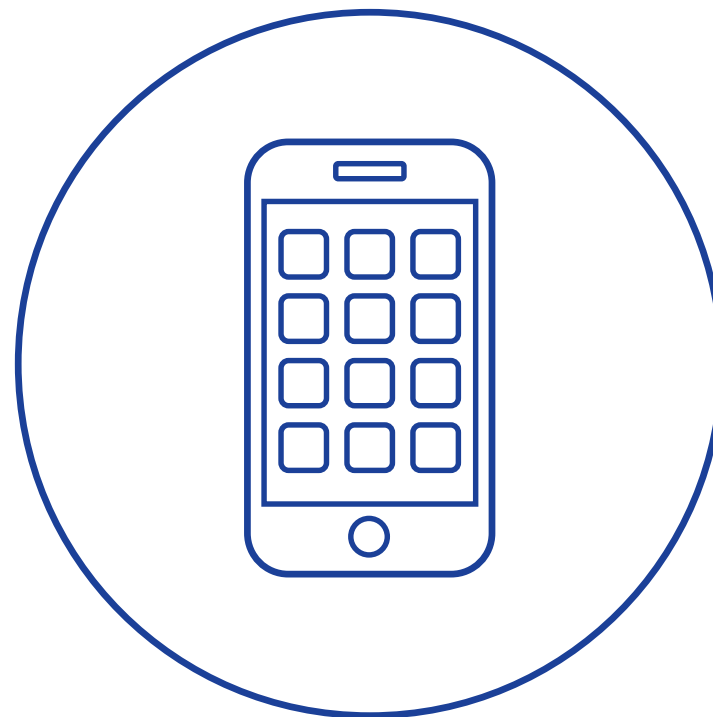
PSM ONLINE NEWS AUDIENCE

PSM online offer provides citizens with a continuous stream of the latest reliable information on the developments in their countries and across the globe.

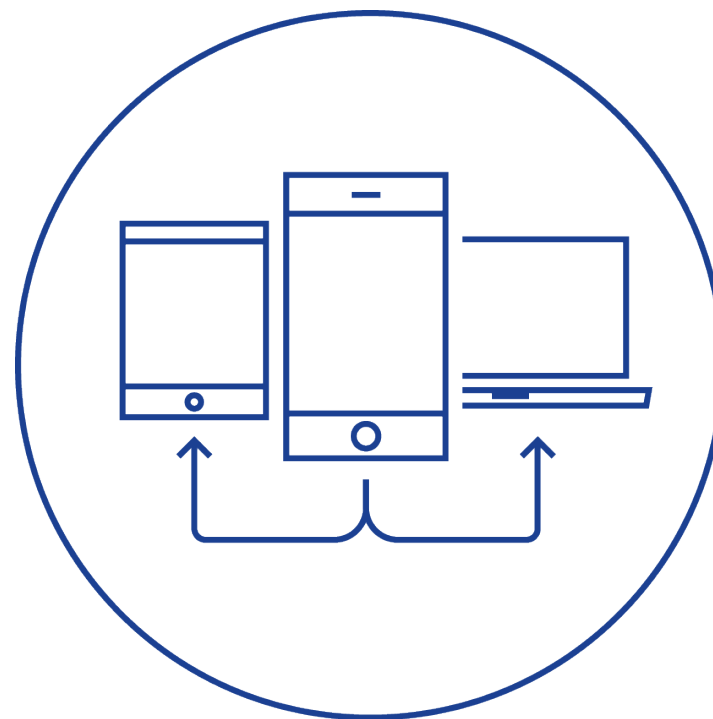
Citizens can turn to PSM content via news websites and dedicated news apps. This section of the report is based on data collected on usage of EBU PSM news websites.



**Visits/sessions on
PSM apps and
news apps **up x2**
as citizens need
regular updates
on COVID-19 crisis**



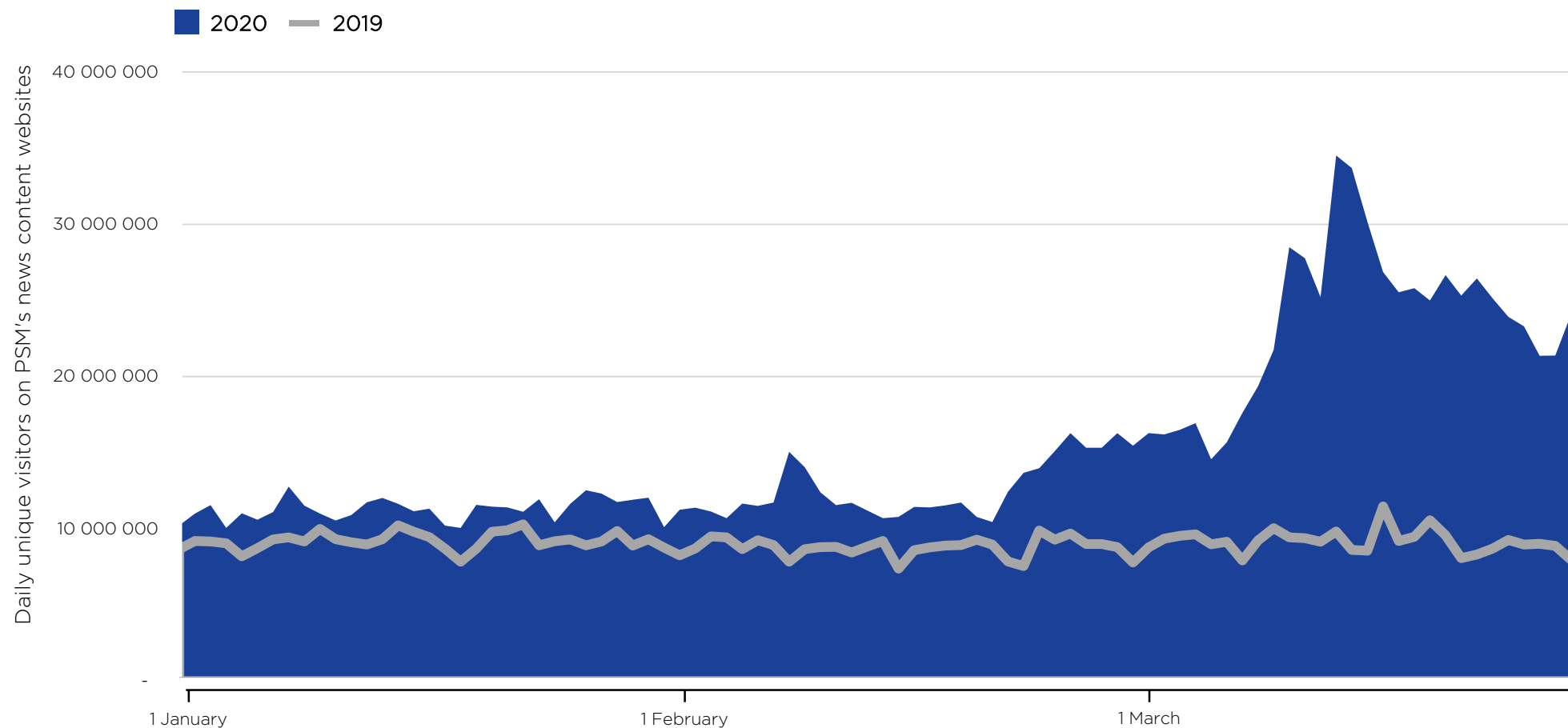
PSM news websites' daily reach **up x2.6** as citizens turn to trusted online news sources during COVID-19 crisis



Source: EBU based on Members' data from 20 organizations.
PSM's news content websites - Average daily unique visitors for March 2020 versus January-March 2019

PSM ONLINE NEWS' REACH PEAKED MID-MARCH

People visited PSM's website to read, listen and watch news content amid the COVID-19 crisis. The number of unique visitors started to significantly increase in the end of February to reach a peak on March 15 with more than 34.5 million unique visitors for news content. In the second part of March the number of daily unique visitors decreased.



Source: EBU based on Members' data - data for PSM's news content websites - excluding BBC (UK), ZDF (Germany) and Yle (Finland). For Rai (Italy) and ERR (Estonia) unique visitors include apps, For RTVS (Slovakia) and SR (Sweden) all the website's content is included. Franceinfo data is included in Radio France (RF / FI)

PSM YOUTUBE NEWS CHANNELS PEAK MID-MARCH

The mid-March peak in news consumption is also visible on PSM YouTube news channels' views. The channels' daily growth in terms of views peaked on March 22.

Channels views daily growth for PSM news channels

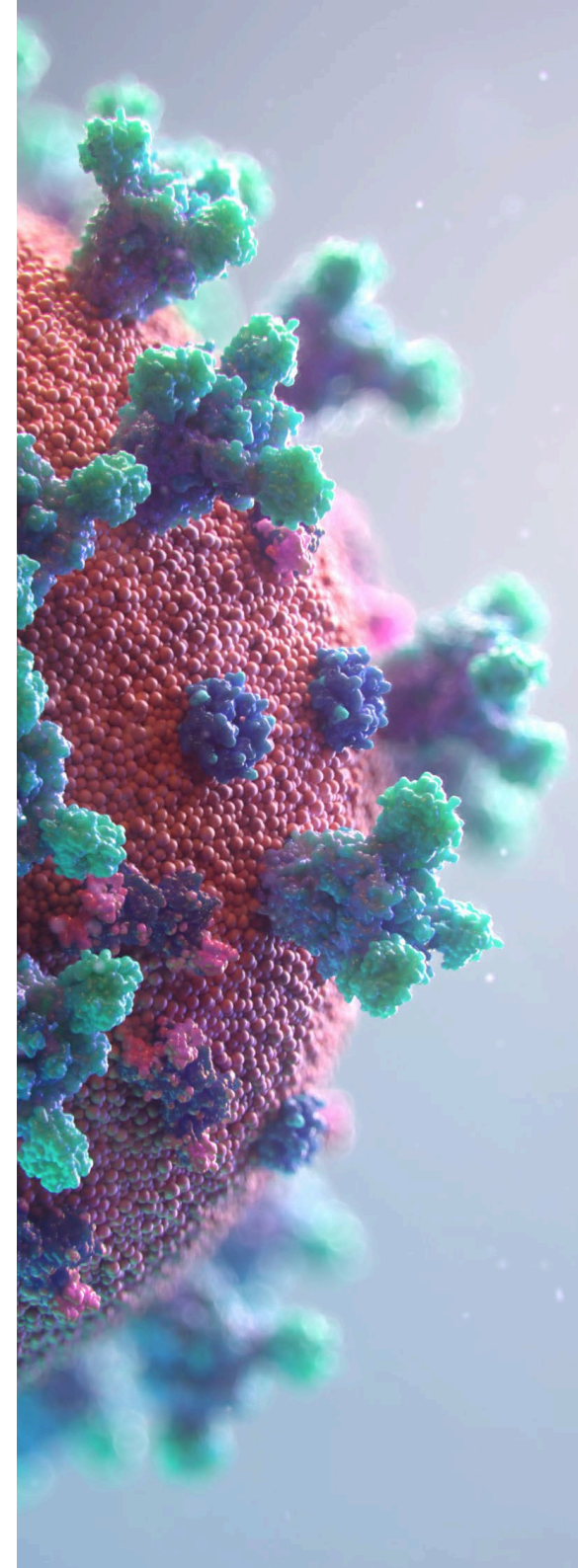


Source: Fanpage Karma - based on daily growth of channels views. PSM news channels included BBC News, FRANCE 24, RTP, DW (English), tagesschau, Georgian Broadcaster, TRTHaber, Hrvatska, radiotelevizija, franceinfo, UA:Перший, Vatican, DR Nyheder, RTÉ News, BHRT - Radiotelevizija Bosne i Hercegovine, Television Malta, NRK Nyheter, CT24zive, YLE TV Polska Uutiset, Nieuws NOS, Stirile TVR,rai news

PSM RADIO AUDIENCE

Radio stations from EBU PSM organizations have dedicated much of their air-time during this crisis to keeping citizens informed. With the impact of citizens being confined at home, the focus of typical peak drive time and lunch time slots has been replaced by steady streams of information throughout the day.

Radio audience data is available for just a small selection of markets with electronic measurement. In the majority of European markets radio audience measurement is conducted using telephone and face-to-face interview techniques, which require longer reporting periods therefore Q1 2020 data for these markets is not yet available.

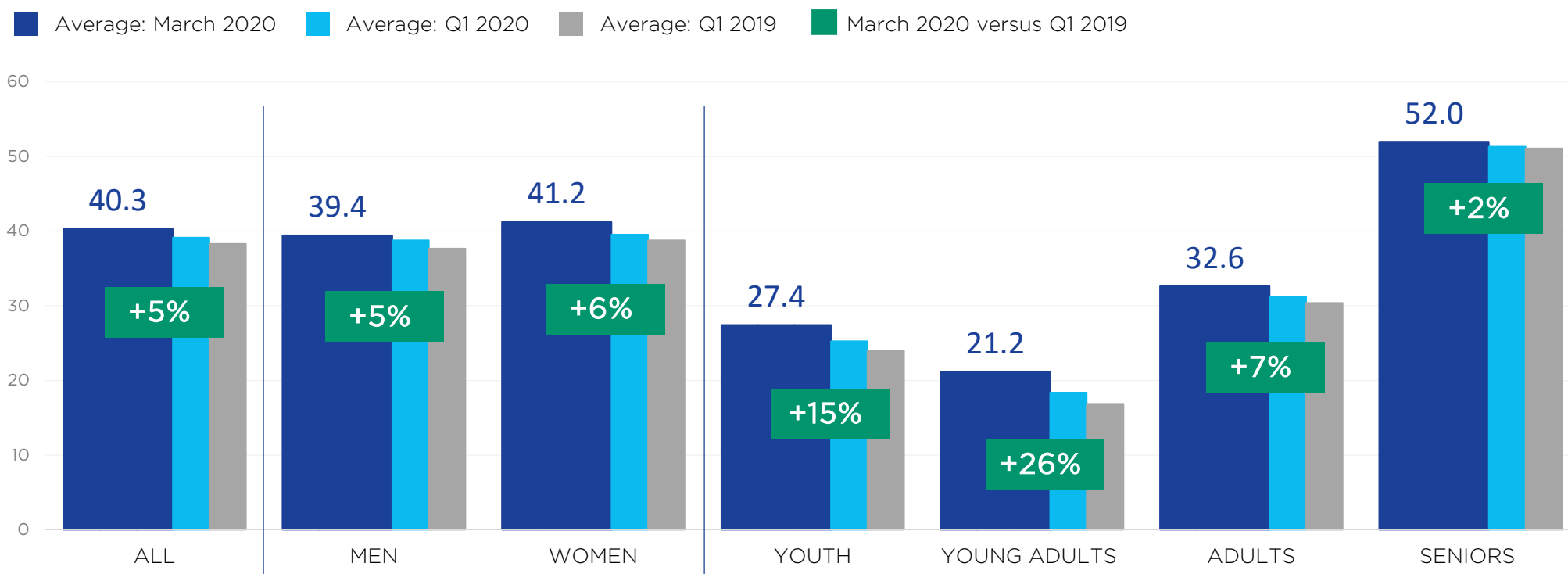


PSM RADIO GROWTH ACROSS YOUNGER DEMOGRAPHICS

The start of the COVID-19 crisis saw younger listeners turning to PSM radio for trustworthy updates on key announcements in their countries as well as developments across the globe.

Listening share increased 15% among youth and 26% among Young Adults in March 2020 versus Q1 2019.

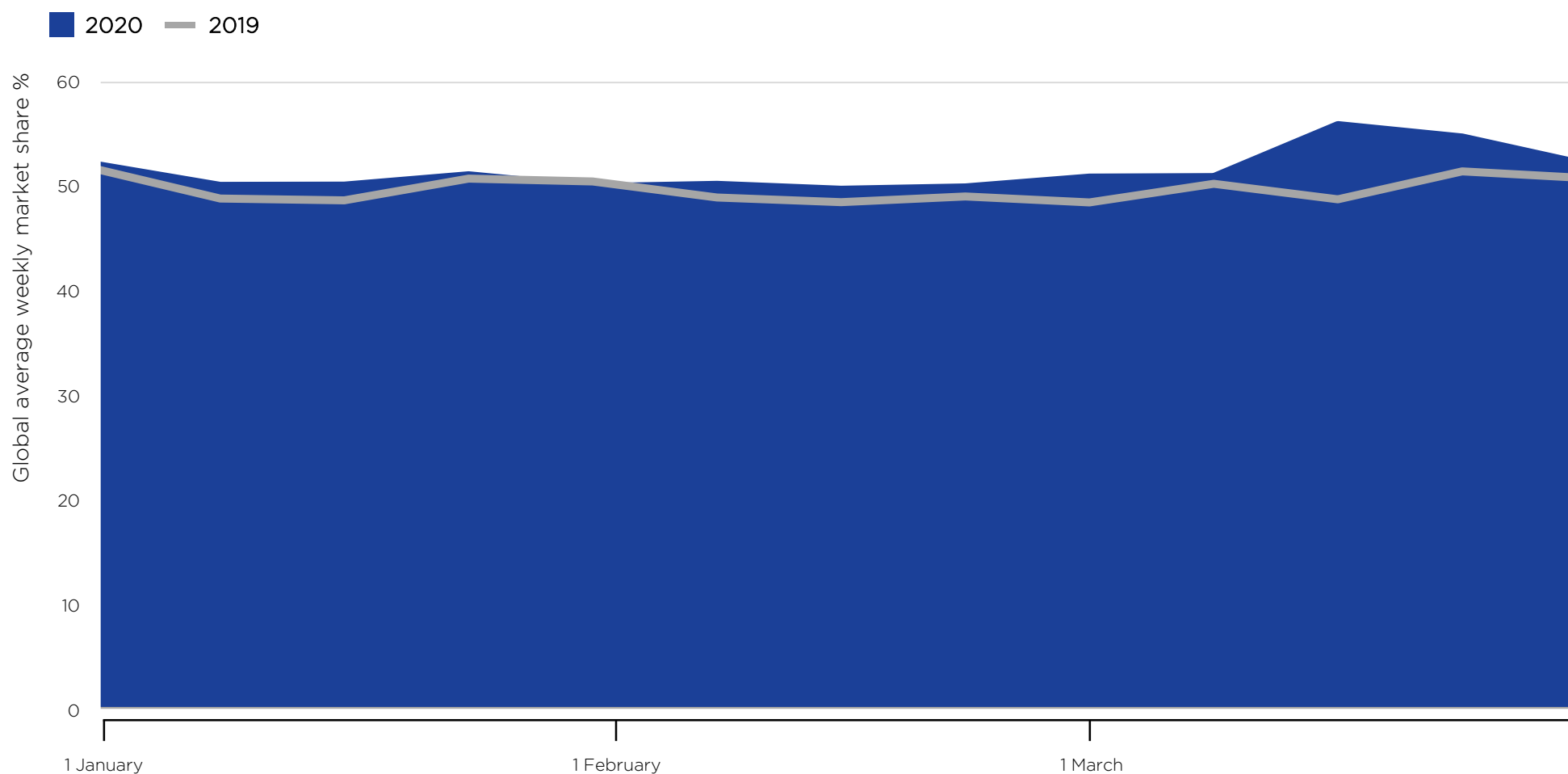
Average daily Listening Share (%) of PSM Radio by target groups



Age definitions: Children 4-14, Youth 15-24, Young Adults 25-34, Adults 35-59, Seniors 60+. Definitions may vary slightly by country.

THE MORE DRAMATIC THE CRISIS BECOMES, THE MORE CITIZENS TURN TO PSM RADIO

As the COVID-19 crisis worsens PSM Radio becomes indispensable, listening shares peaked in mid-March when the crisis was deepening in the measured markets.



WHAT SHOULD I READ NEXT?



Members-only

NEW COVID-19 SERIES

Your Media Intelligence Service has launched a dedicated COVID-19 series covering the most relevant areas affected by the crisis. The goal of this series is to help EBU Members navigate through these unprecedented times.

Keep up to date here.

COVID-19 CRISIS PSM IMPACT ON MEDIA MARKETS

This report covers the most relevant areas affected by the crisis. The goal of this series is to help EBU Members navigate through these unprecedented times.

Take a look at the impact the virus is having on the media market:

- o A variety of media consumption habits have soared. See who the winners are.
- o Advertising is at risk, on the edge of a new crisis.
- o The European recession's potential impact on PSM's budget.



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Our market data and analysis covers a broad range of topics affecting public service media, including TV and radio trends, new media developments, market structure and concentration, funding and public policy issues.

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MEDIA INTELLIGENCE SERVICE

This report is published by the European Broadcasting Union's Media Intelligence Service (MIS).

MIS provides Member broadcasting organizations with the latest market data, research and analysis needed to plan their future strategies and stay ahead of the game.

Our experts cover a broad range of topics, including TV and radio trends, new media developments, market structure and concentration, funding and public policy issues.

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