



EBU

OPERATING EUROVISION AND EURORADIO

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HOW PUBLIC SERVICE MEDIA DELIVER VALUE

MEDIA INTELLIGENCE SERVICE

DECEMBER 2021

ABOUT THIS REPORT

Public Service Media are decisive in fostering well-being, developing informed citizenship and strengthening democratic societies.

However, in a context of persisting sanitary, socioeconomic and sometimes democratic crisis, citizens and politicians might forget the essential role that PSM play in people's lives. That's why this report aims to support PSM organizations in building strong and fact-based arguments about the value they deliver. This way, they will have the opportunity to demonstrate how PSM fulfil their purpose.

DATA SOURCES

This report mainly uses data provided by PSM organizations that are Members of the European Broadcasting Union (EBU).

The information was collected in the various sections of the 2021 Media Intelligence Survey.

When necessary, additional information was obtained from third party organizations such as the European Audiovisual Observatory or the Reuters Institute for the Study of Journalism.

RELATED MIS REPORTS

The report pulls insights from reports released in 2020 and 2021 by the Media Intelligence Service (MIS) of the EBU.

Mostly used reports are [Democracy and PSM](#), [PSM and news](#), [Trust in media](#), [Funding of PSM](#), [collection of COVID-19 reports](#), [Youth report: what's next?](#), [Gender Equality and PSM](#).



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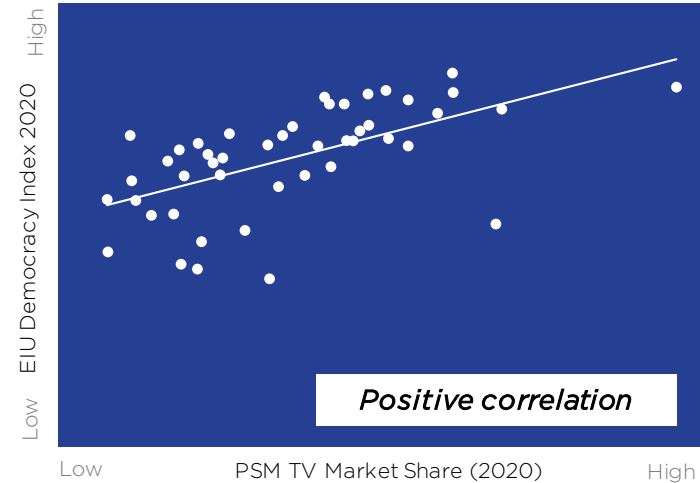
PUBLIC SERVICE MEDIA
**STRENGTHEN
DEMOCRACY**



Citizens watch more public TV in stronger democracies, and stronger democracies invest more in their PSM



Public tv is most watched in strong democracies

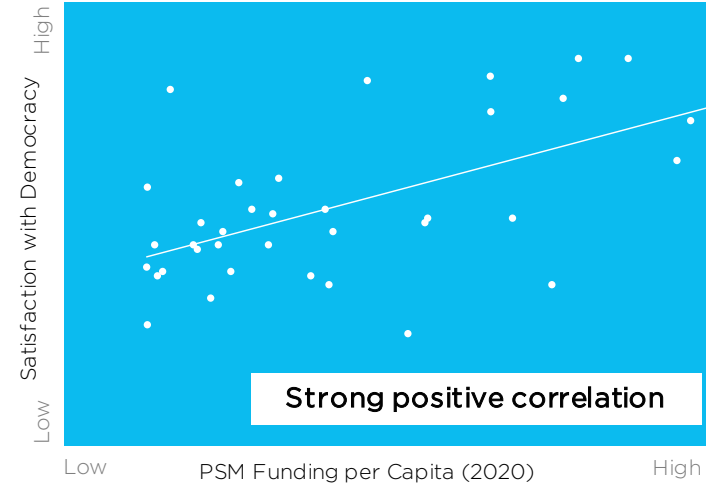


Source: EBU based on Members' data, Glance/Mediаметrie and relevant partners & EIU Democracy Index 2020
EBU Media Intelligence Service - [Democracy and Public Service Media 2021](#).

Well-funded PSM go hand in hand with **citizens' satisfaction with democracy**



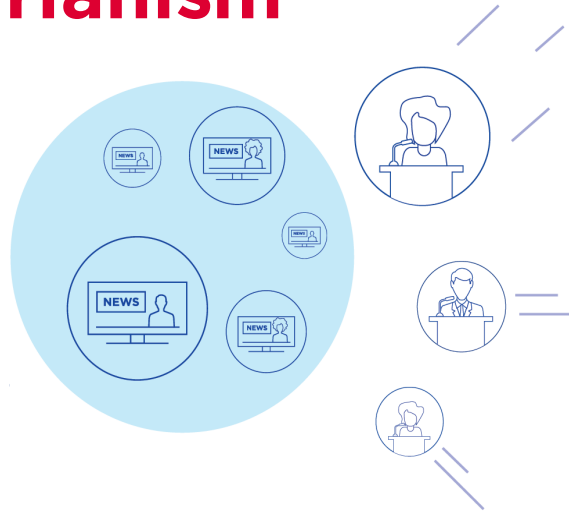
Citizens in countries with better-funded PSM are more satisfied with the way democracy works within their country.



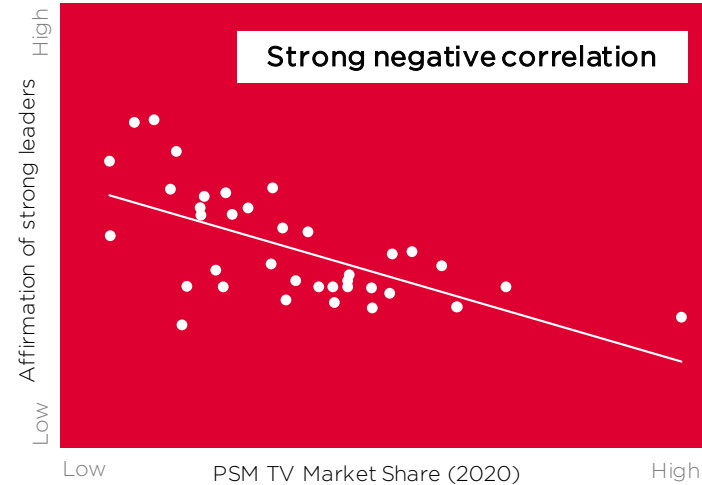
Note: Satisfaction with democracy based on agreement with statement “On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in our country”?

Source: EBU based on Members' data & Standard Eurobarometer 94. EBU Media Intelligence Service – [Democracy and Public Service Media 2021](#)

Strong and well-equipped PSM contribute to reject authoritarianism



In countries with higher PSM market shares, citizens are less likely to think of authoritarian leadership as a good way of governing their country.



Note: Based on statement “Having a strong leader who does not have to bother with parliament and elections. Would you say it is a very good, fairly good, fairly bad, or very bad way of governing this country?”

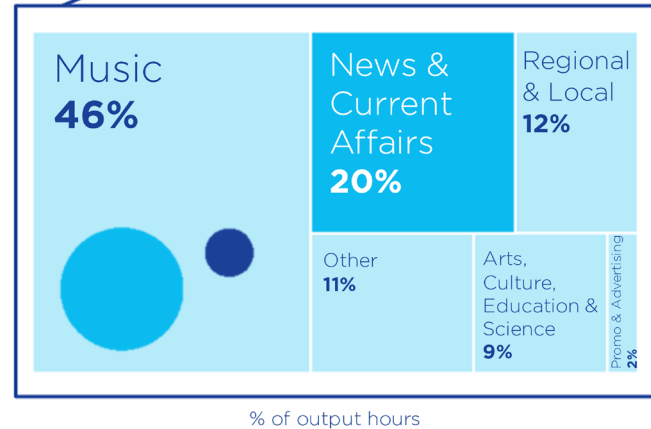
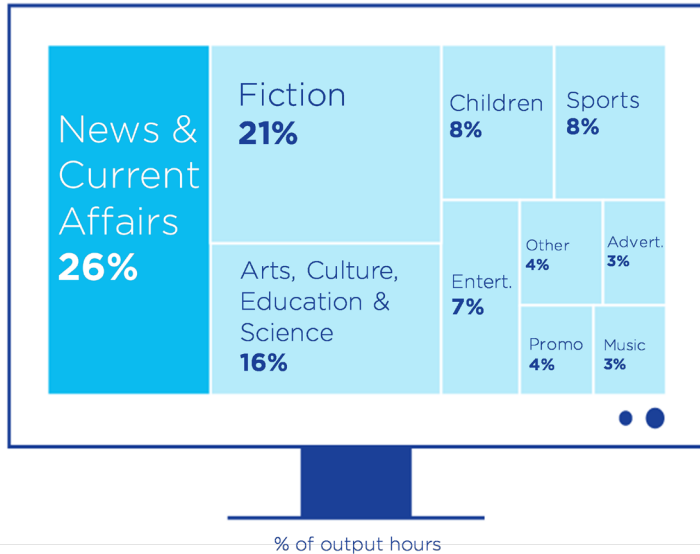
Source: EBU based on Members’ data and World Values Survey Wave 7. EBU Media Intelligence Service – [Democracy and Public Service Media 2021](#)

PUBLIC SERVICE MEDIA
**KEEP CITIZENS
INFORMED**



News is at the **core** of PSM programming

News is the most frequent genre broadcast by PSM TV channels



PSM broadcast approximately 7 hours of news and current affairs per day on their generalist radio stations.

Notes: TV: Breakdown based on 42 PSM organizations operating in 39 markets. 2020 data except for RTSH (2018 data), AMPR, ZDF, RAI, TVR, CH4 and BBC (2019 data). Radio: Data based on 39 PSM organizations operating in 34 markets. 2020 data except for BNR, FMM, RTVE and BBC (2019 data).

Source: EBU based on Members' data. EBU Media Intelligence Service - [PSM & News 2021](#).

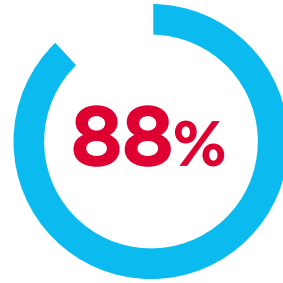
PSM bring European citizens a 360° news offer



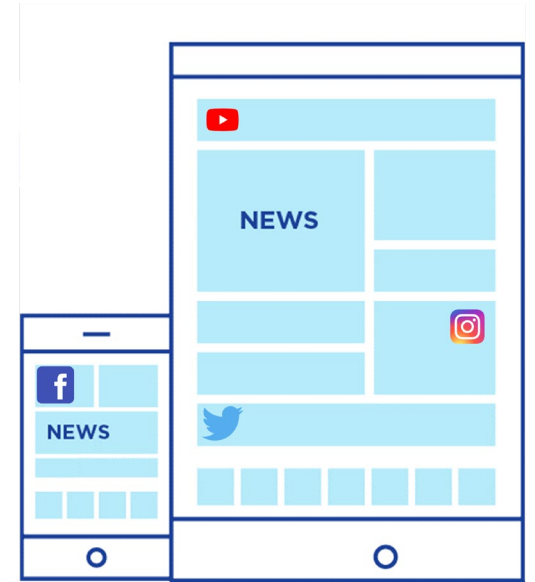
OF PSM
OPERATE A
DEDICATED
ONLINE NEWS
OFFER



OF PSM
OFFER
A DEDICATED
APP FOR
NEWS CONTENT



OF PSM
CREATE
NEWS CONTENT
SPECIFICALLY FOR
SOCIAL MEDIA



PSM is Europe's largest newsroom



PUBLIC SERVICE MEDIA
DIRECTLY EMPLOYED

40 000+

JOURNALISTS
ACROSS EUROPE
IN 2020

Notes: Data based on 46 PSM organizations in 37 markets. Includes PSM permanent and non-permanent journalists. Freelancers not included. The definition of a journalist greatly varies from one market to another. 2020 data, except when not available 2018 or 2019 data were used.

Source: EBU based on Members' data. EBU Media Intelligence Service - [PSM & News 2021](#).

EBU Media Intelligence Service - How PSM Deliver Value?

PUBLIC SERVICE MEDIA

**ARE TRUSTED
SOURCES OF NEWS**

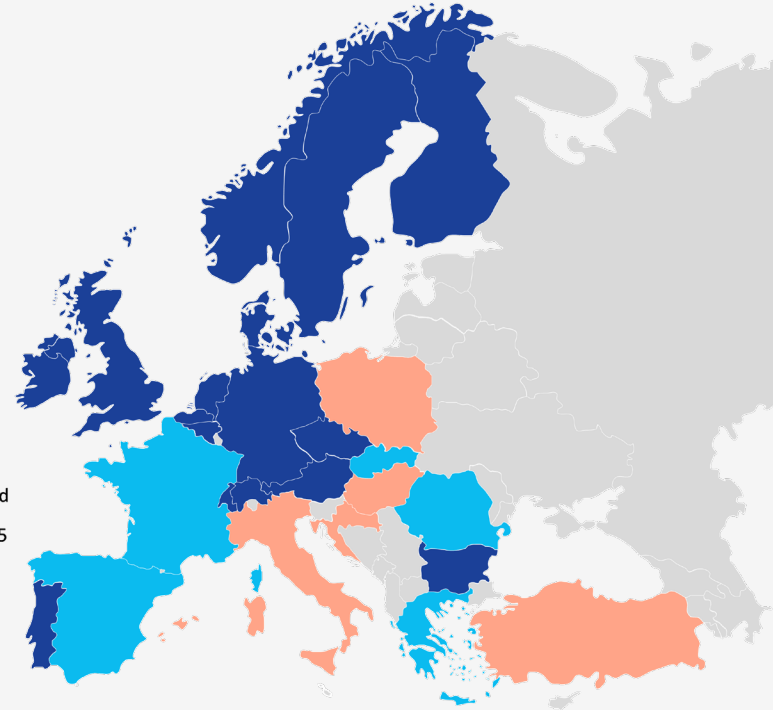


European citizens tend to trust PSM news the most

In **16** of **26**
European markets,
PSM is the **most trusted news brand**

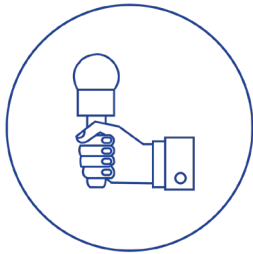


- PSM most trusted
- PSM among top 5
- PSM not among top 5
- Country not included

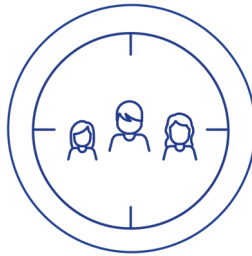


Source: EBU based on [Reuters Institute Digital News Report 2021](#). Based on 26 European markets.
EBU Media Intelligence Service - [Trust in Media 2021](#)
EBU Media Intelligence Service - How PSM Deliver Value?

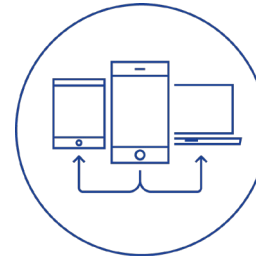
Citizens turn to PSM news in times of crisis



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 **+44% on average**



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

Note: Age definitions – youth 15 to 24. Definitions may vary slightly by country.

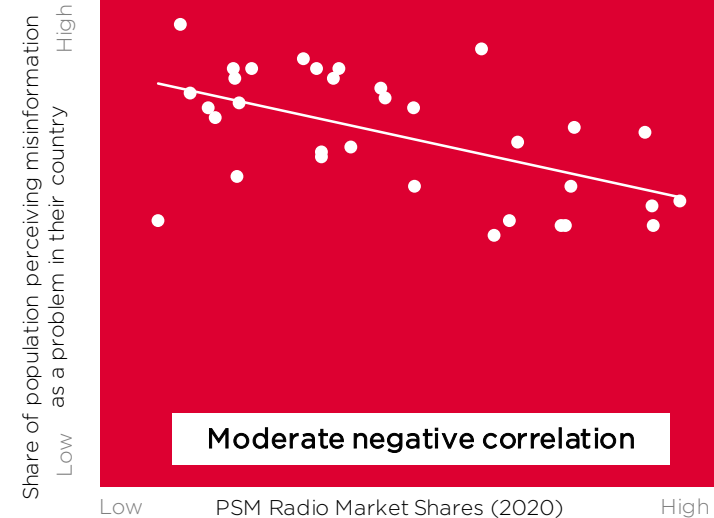
Source: EBU based on Members' data from 29 organizations. EBU Media Intelligence Service – [COVID-19 Crisis – PSM Audience Performance](#)

EBU Media Intelligence Service – How PSM Deliver Value?

The greater audiences of PSM, the lesser citizens' concern about and perceived exposure to misleading or false information



Greater audiences of PSM go along with less concern about misinformation



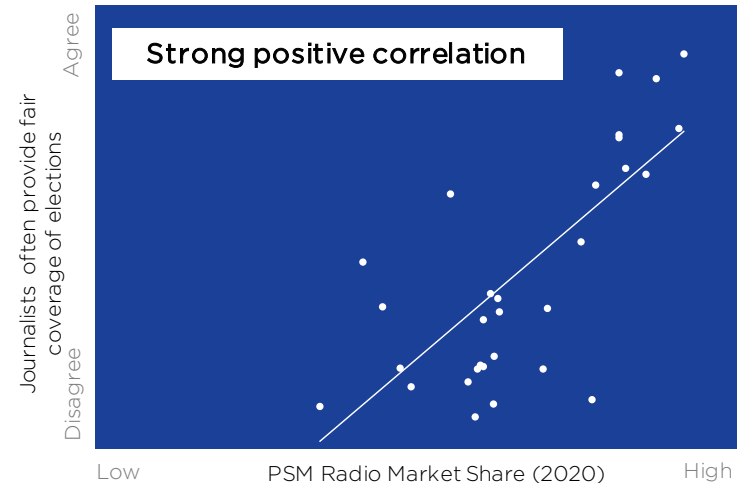
Additionally, the higher the PSM funding per capita in a country, the lower the share of its citizens saying that they often come across information that they believe to misrepresent reality or even be false.

Note: Based on statement “the existence of news or information that misrepresent reality or is even false is a problem in our country.”
Source: EBU based on Members’ data and Standard Eurobarometer 94. EBU Media Intelligence Service - [Democracy and Public Service Media 2021](#).



A greater audience for PSM goes hand in hand with greater confidence in election reporting

The greater the audience of public TV in a country, the more citizens perceive news coverage of elections to be generally fair.



Note: Based on statement “How often in country’s elections: Journalists provide fair coverage of elections”, share of population answering “very often” and “fairly often.”
Source: EBU based on Members’ data and World Values Survey Wave 7. EBU Media Intelligence Service – [Democracy and Public Service Media 2021](#).

Maximizing PSM online reach has the potential to reduce polarized news consumption

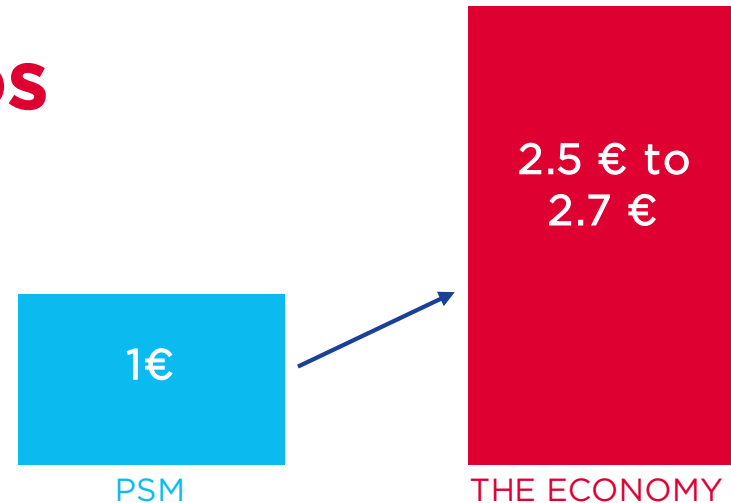


PUBLIC SERVICE MEDIA

MAKE A POSITIVE ECONOMIC CONTRIBUTION



Each euro invested in funding
PSM generates
from **2.5 to 2.7 euros**
in the economy



Source: EBU based on EBU based on studies from VRT (Belgium Flemish), RTBF (Belgium French), TG4 (Ireland), RAI (Italy), RSI (SRG SSR, Switzerland).
EBU Media Intelligence Service - [Funding of Public Service Media 2020](#).

For each music-related job
in public radio,
2 additional roles
are created across the
European economy



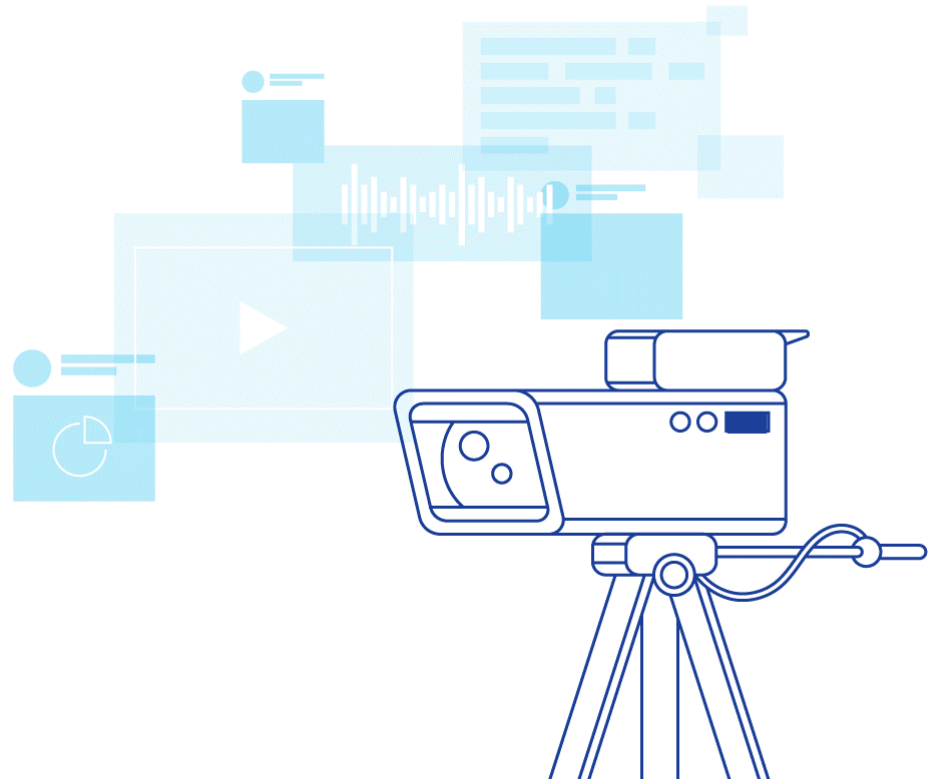
PUBLIC SERVICE MEDIA

**SUPPORT
EUROPEAN
CREATIVE
INDUSTRIES**



**PSM support the
content industry,
investing more than**

**EUR 18
billion a year
in content**

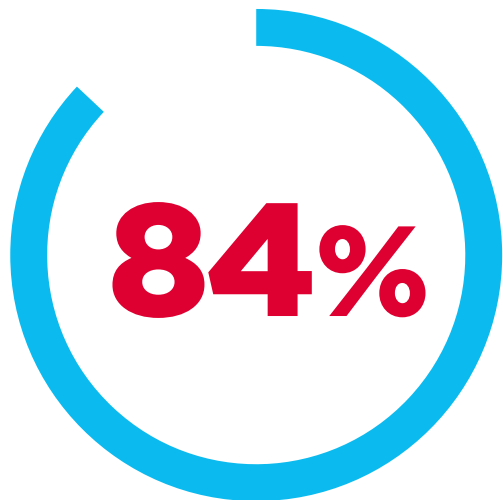


Note: based on 55 PSM organizations in 41 markets.

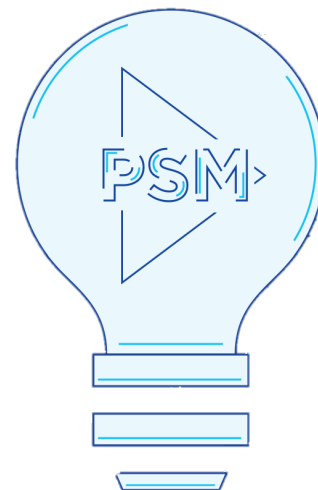
Source: EBU based on EBU PSM Member's 2020 data. EBU Media Intelligence Service - [Datasets 2021](#).

EBU Media Intelligence Service - How PSM Deliver Value?

PSM are committed to creators, investing more than



of total
content spend
in **original**
content



PSM showcase European content, with

90%

of their TV output of domestic or European origin



% of output hours

Domestic

Europe
(not including
own market)

USA

Other

75
%

15
%

7

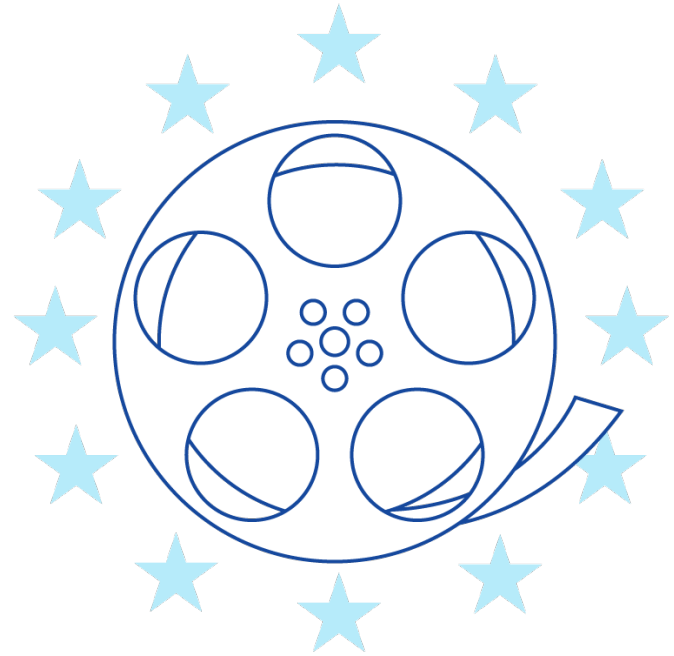
3%

Note: based on 38 PSM organizations in 36 markets.

Source: EBU based on EBU PSM Member's 2020 data. EBU Media Intelligence Service - [Datasets 2021](#).

EBU Media Intelligence Service - How PSM Deliver Value?

**PSM are driving European
fiction productions, with
66%
of all fiction titles
produced in the EU**



**European PSM have supported
of the Cannes film
festival's European
Palme d'Or over the
past 10 years**



PUBLIC SERVICE MEDIA

**STRIVE TO
DEVELOP
INNOVATION**



95%

of radio PSM
make their online
audio offer
available via
mobile apps



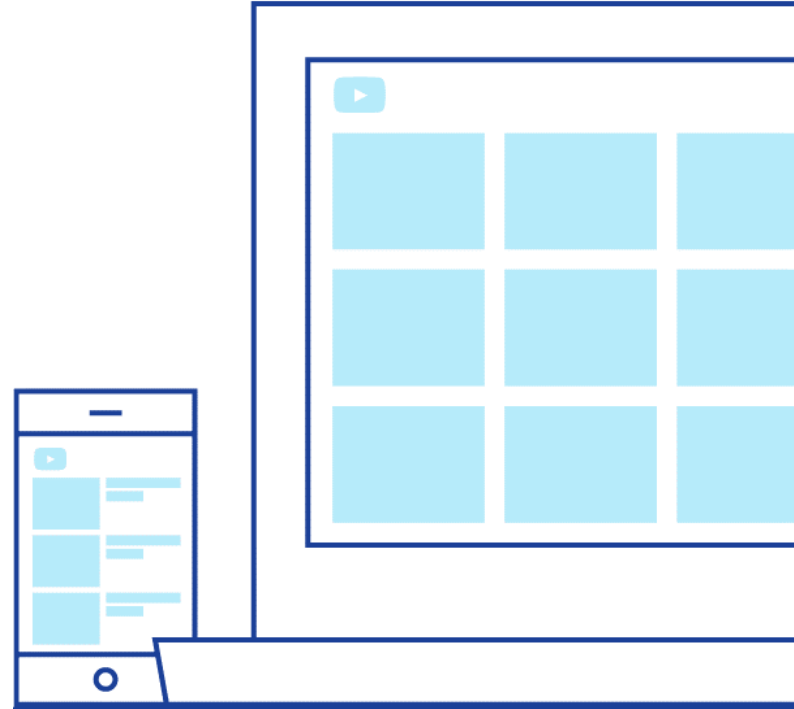
Based on 39 PSM organizations with Radio services.

Source: EBU based on EBU PSM Member's data, 2021. EBU Media Intelligence Service - [PSM AOD Landscape](#).

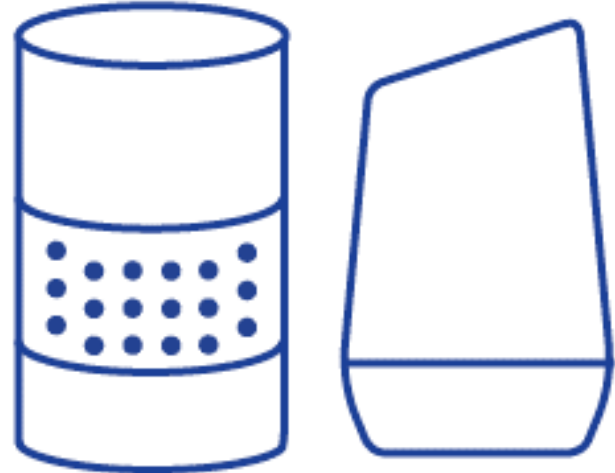
EBU Media Intelligence Service - How PSM Deliver Value?

90%

of TV PSM
make their
online video
offer available
via **mobile apps**



56%
of radio PSM
offer voice
applications for
Amazon Echo or
Google Home



Based on 39 PSM organizations.

Source: EBU based on EBU PSM Member's data, 2021. EBU Media Intelligence Service - [Datasets2021](#).

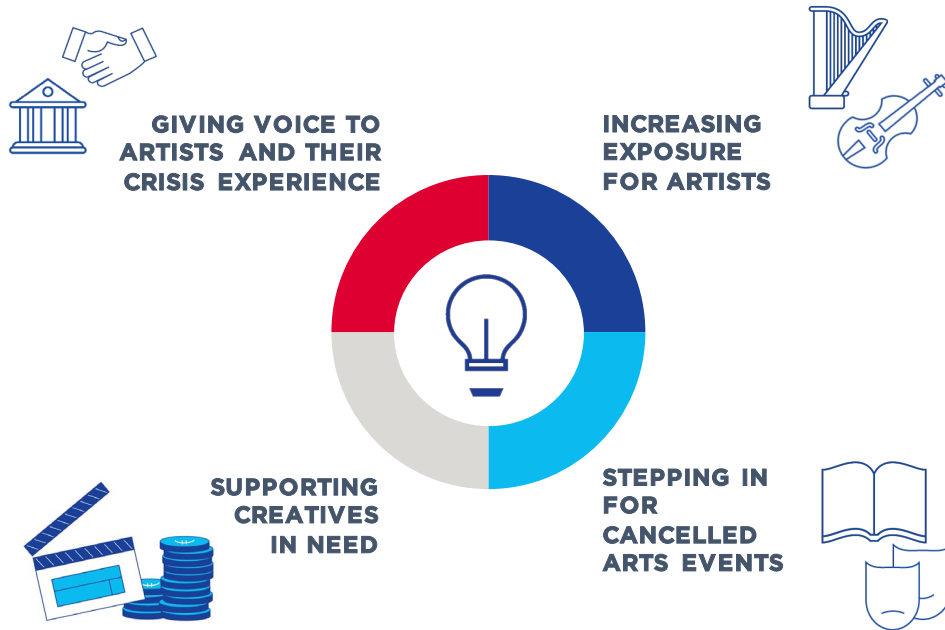
EBU Media Intelligence Service - How PSM Deliver Value?

PUBLIC SERVICE MEDIA

ARE ENGINES OF THE CULTURAL SECTOR



PSM have been a **key support** for the arts sector during lockdowns in 2020

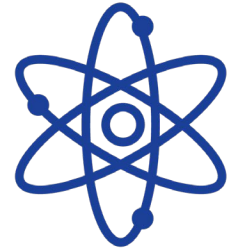


Source: EBU based on EBU PSM Member's data, 2020.

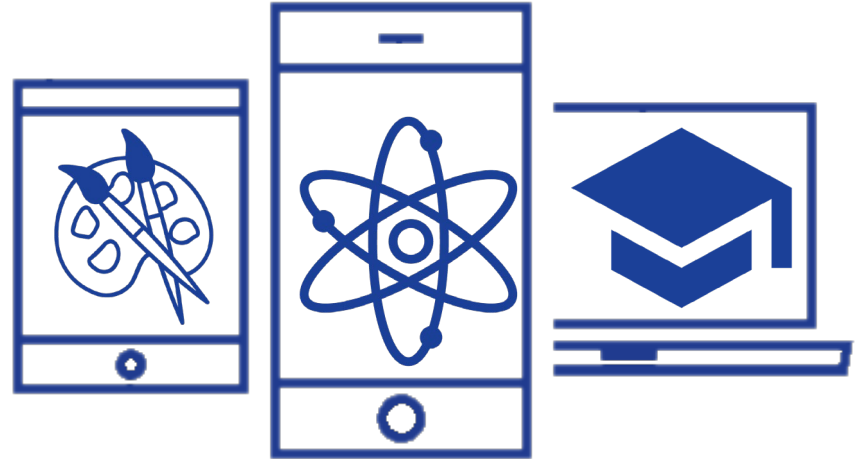
EBU Media Intelligence Service - [COVID-19 Crisis: Public Service Media Support to the Arts and Creative Sector.](#)

EBU Media Intelligence Service - How PSM Deliver Value?

PSM broadcast
275 000
hours of arts,
culture, education
and science
TV programmes
each year



PSM operate
82
radio and TV
channels devoted
to **culture** and
education



PUBLIC SERVICE MEDIA

CONNECT TO YOUNG AUDIENCES



PSM operate

141

TV and Radio services
and internet streams
that specifically target
children and youth



Number of services

TV channels

42

Radio stations

38

Internet streams

61

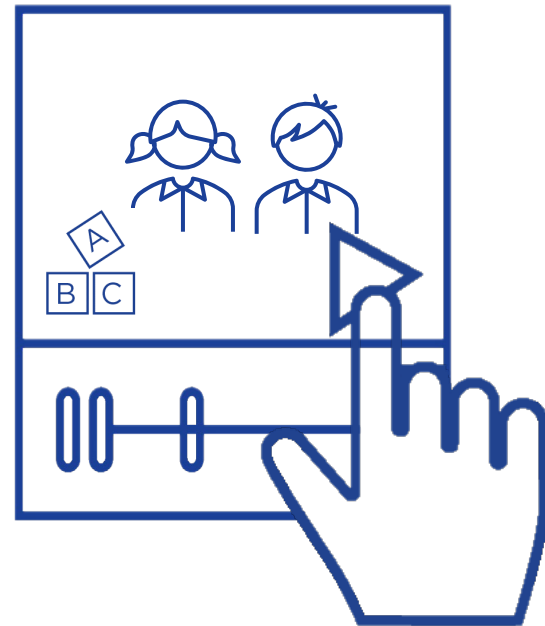
Note: Linear services only, targeting citizens under 20 years old.
Source: Based on EBU PSM Member's data, 2021. EBU Media Intelligence Service - [Datasets 2021](#).

EBU Media Intelligence Service - How PSM Deliver Value?

86%

of PSM have an online offer dedicated to **children**

Among those,
72% have the children
service **available as an app**



Based on 50 PSM organizations.

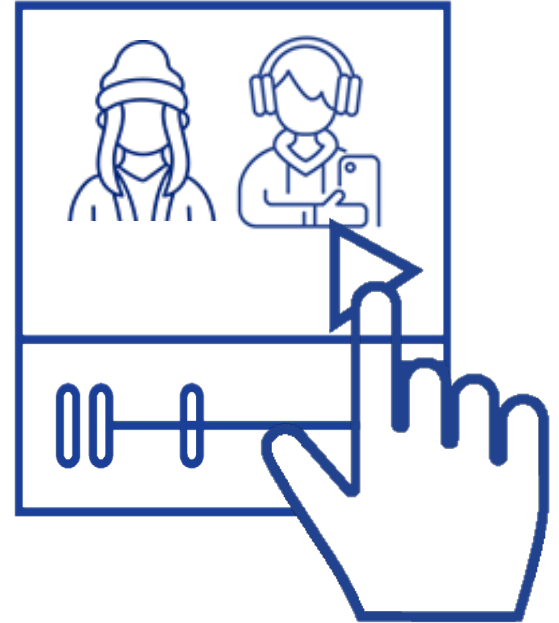
Source: EBU based on EBU PSM Member's data, 2021. EBU Media Intelligence Service - [Datasets2021](#).

EBU Media Intelligence Service - How PSM Deliver Value?

66%

of PSM have an online offer dedicated to youth

Among those,
61% have the youth
service **available as an app**



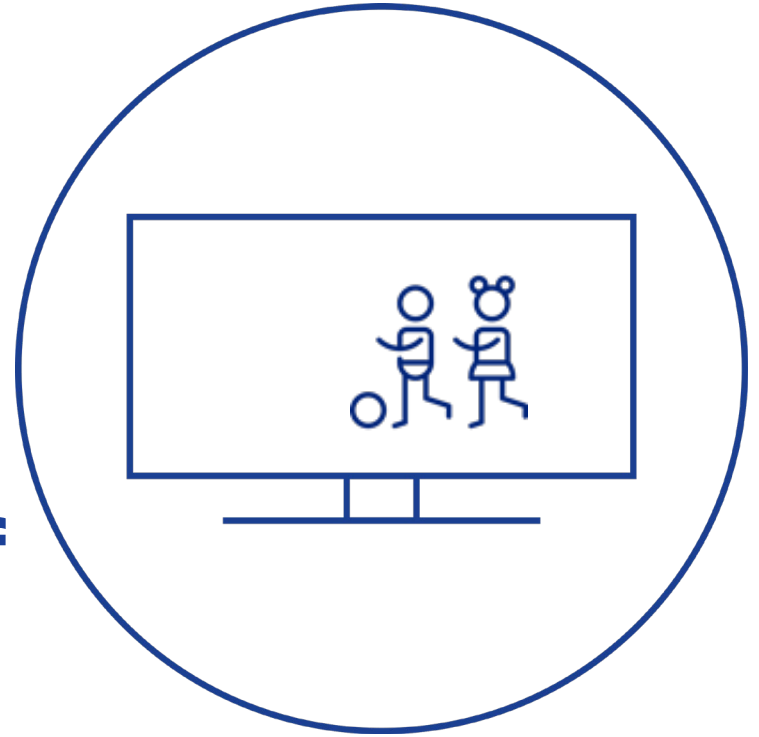
Based on 50 PSM organizations.

Source: EBU based on EBU PSM Member's data, 2021. EBU Media Intelligence Service - [Youth report: what works?](#)

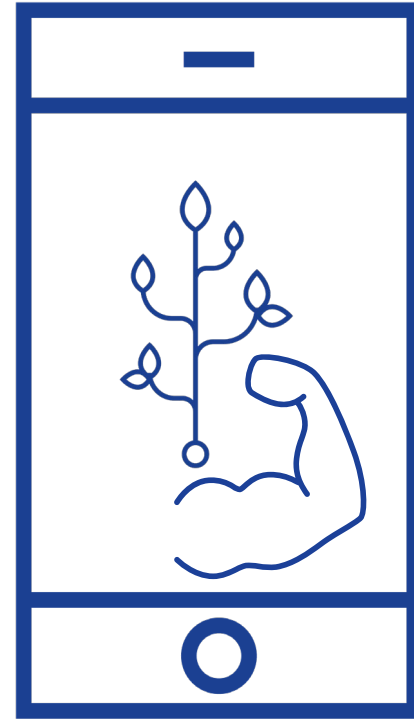
EBU Media Intelligence Service - How PSM Deliver Value?

**On average PSM
reached**

57% of kids
weekly with their TV
services during peak of
COVID-19 crisis



**PSM kids content
boosts
children's
self-esteem, equips
them with strength
and strategies for
difficult situations**



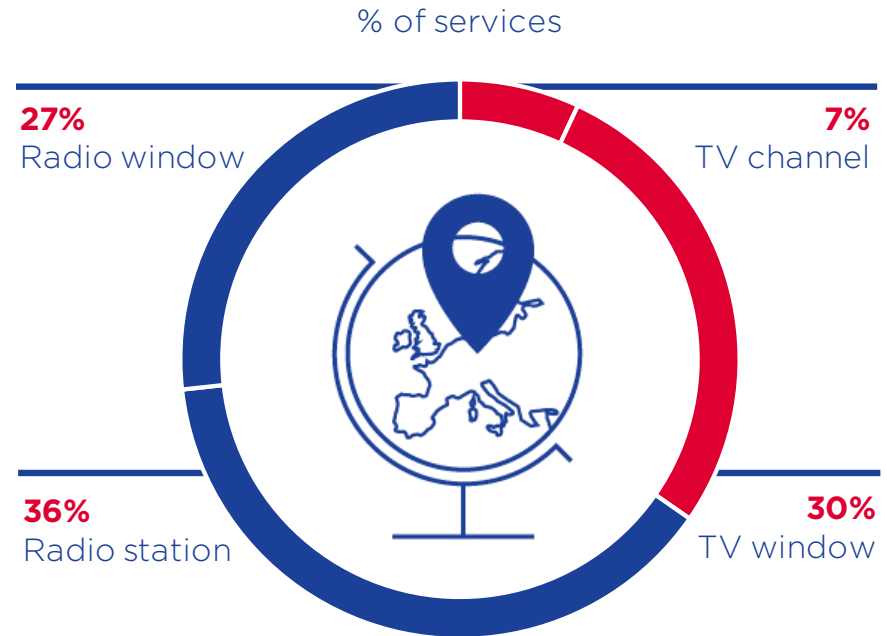
Source: EBU based on IZI (International Central Institute for youth and educational television) report [Resilience and Storytelling](#), 2018.
EBU Media Intelligence Service - [The Value of PSM: Young Audiences Casebook](#).

PUBLIC SERVICE MEDIA

GIVE A VOICE TO COMMUNITIES



PSM operate 1017 regional and local TV and Radio services



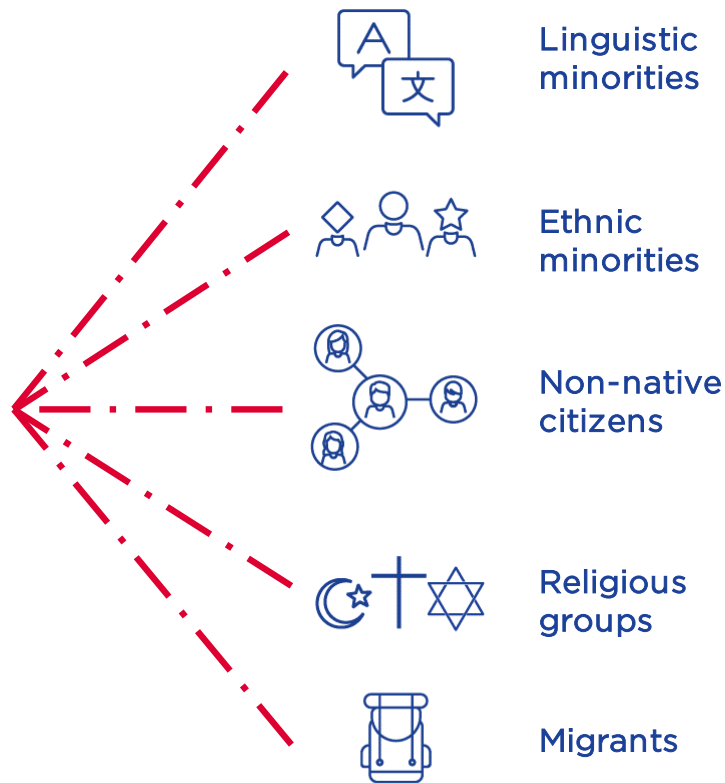
TV and Radio windows are regular broadcast segments on national channels where simultaneous regional programming take place.

Note: Linear services only.

Source: Based on EBU PSM Member organizations, 2021 data. EBU Media Intelligence Service - [Datasets 2021](#).

EBU Media Intelligence Service - How PSM Deliver Value?

PSM operate 281 TV and Radio services and internet streams that specifically target



Note: Linear services only.

Source: Based on EBU PSM Member organizations, 2021 data. EBU Media Intelligence Service - [Datasets 2021](#).

EBU Media Intelligence Service - How PSM Deliver Value?

**In 2020 PSM
collected**

EUR 390 million

**thanks to their TV and radio
charity fundraisers**

supporting a large range of causes, from children in need to disaster relief and medical research



Note: Data covering 21 European countries.

Source: EBU based on Members' data. EBU Media Intelligence Service - [Datasets 2021](#).

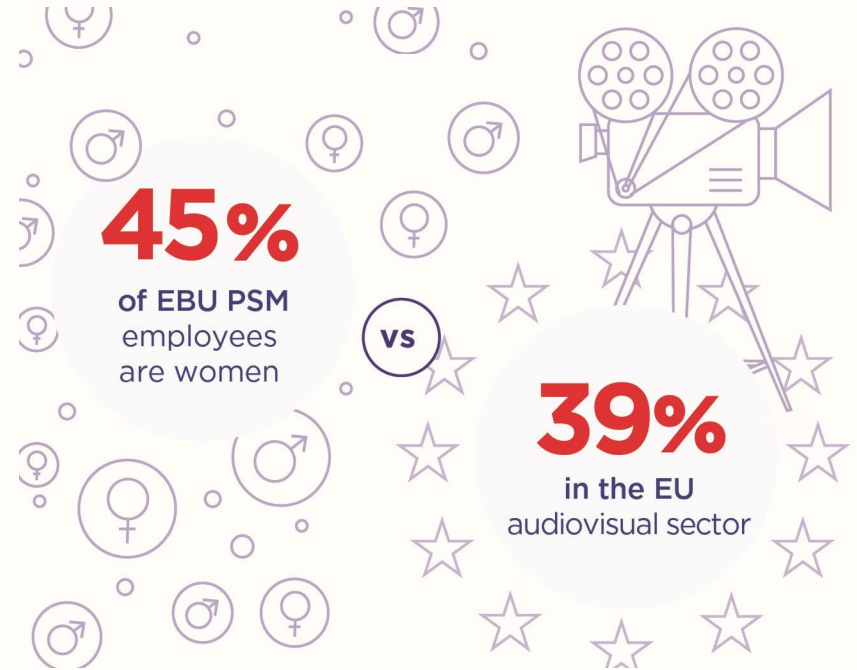
EBU Media Intelligence Service - How PSM Deliver Value?

PUBLIC SERVICE MEDIA

ARE ON THEIR WAY TO GENDER EQUALITY

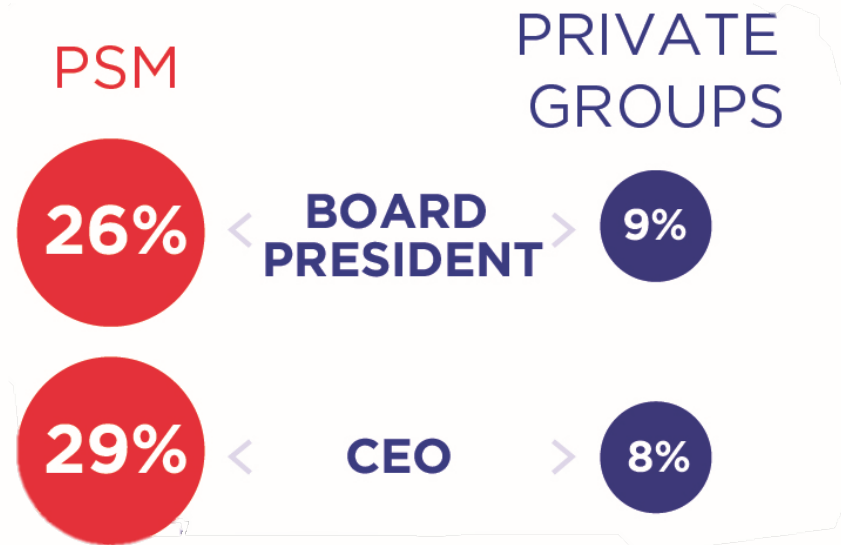


PSM employ more women than the rest of the European audiovisual sector



Note: European audiovisual sector data based on EU27+UK data from Eurostat (European Labour Market data).
Source: EBU based on Members' data and Eurostat - [Gender Equality and Public Service Media 2021](#).

PSM leadership is more feminized than the private sector

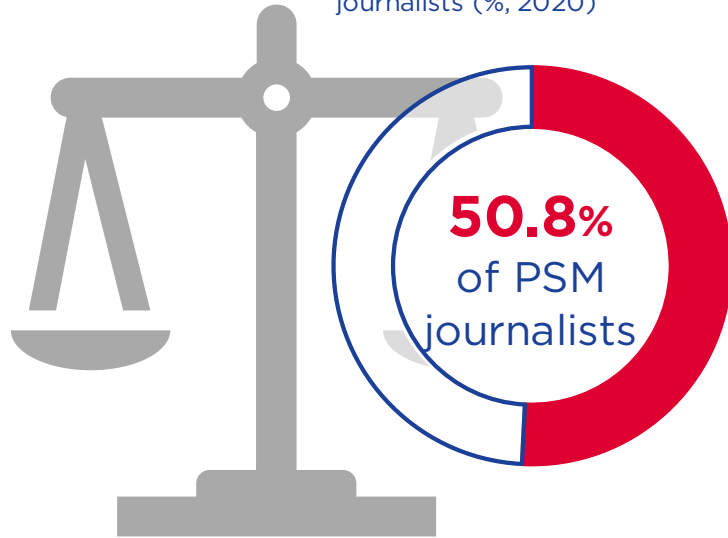


Note: board 2020 data based on 55 PSM organizations in 38 European countries and 709 publicly-listed groups in 35 European countries. Supervisory boards defined as highest decision-making body in each organization. CEO data 2020 data based on 55 PSM organizations in 38 European countries and 706 publicly-listed groups in 35 European countries.

Source: EBU based on EIGE data. EBU Media Intelligence Service – [Gender Equality and Public Service Media 2021](#).

PSM newsrooms are gender balanced

Proportion of women among PSM journalists (% , 2020)



MANY PSM
HAVE **GENDER
BALANCED
NEWSROOMS,**
WITH

51%

OF ALL
JOURNALISTS
BEING WOMEN

Notes: Data based on 46 PSM organizations in 37 markets. Includes PSM permanent and non-permanent journalists. Freelancers not included. The definition of a journalist greatly varies from one market to another. 2020 data, except when not available 2018 or 2019 data were used.

Source: EBU based on Members' data. EBU Media Intelligence Service - [PSM & News 2021](#).

PUBLIC SERVICE MEDIA

CHAMPION DIVERSITY AND INCLUSION



72%

of PSM organizations
provide all three key
access services:

- ✓ **subtitling,**
- ✓ **audio description, and**
- ✓ **signed programmes**

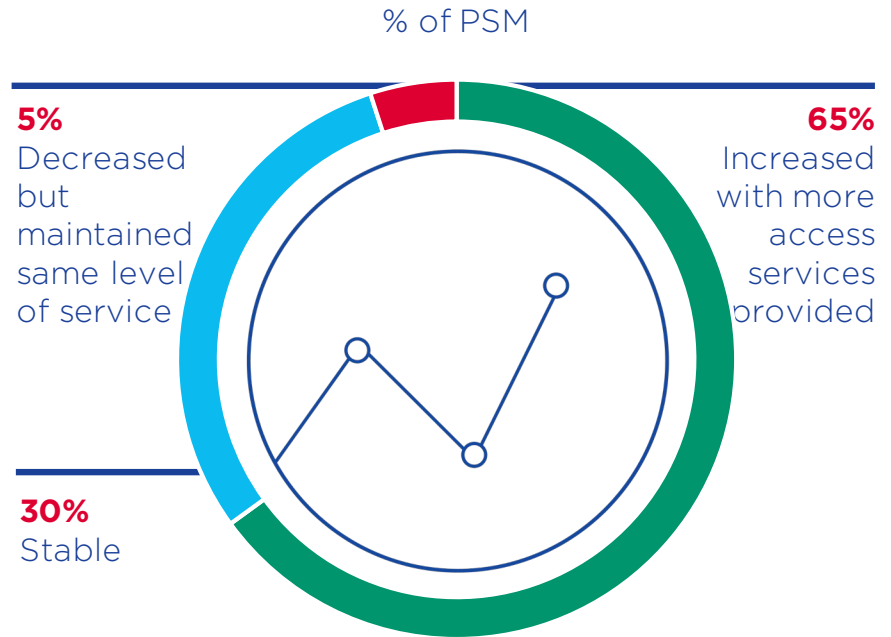


Note: Based on 43 PSM organizations.

Source: PSM Access Services Survey 2019. EBU Media Intelligence Service - [PSM Access Services Survey 2019](#).

EBU Media Intelligence Service - How PSM Deliver Value?

65% of PSM increased their annual budget for access services in 2019



Note: Based on 43 PSM organizations.

Source: PSM Access Services Survey 2019. EBU Media Intelligence Service - [PSM Access Services Survey 2019](#).

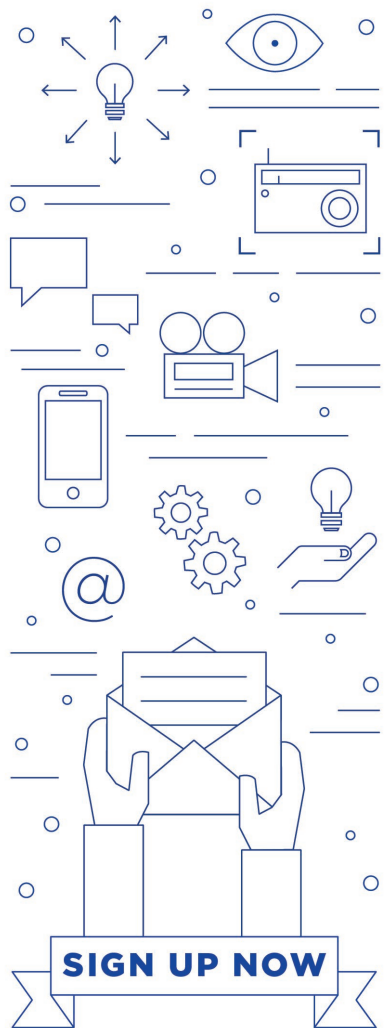
EBU Media Intelligence Service - How PSM Deliver Value?

Already **32%** of PSM commit to Diversity, Equity and Inclusion by setting quantitative targets



Note: Based on 53 PSM organizations.

Source: EBU based on Members' data EBU Media Intelligence Service - [Diversity and Public Service Media 2021](#).



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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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