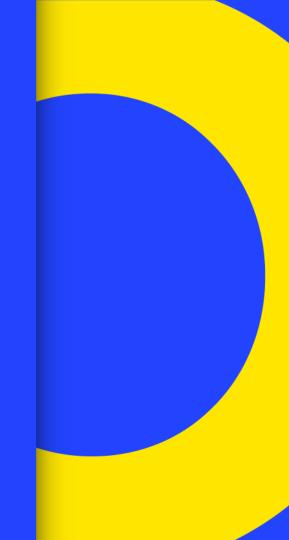


YOUTH AND MEDIA IN EUROPE

MEDIA INTELLIGENCE SERVICE

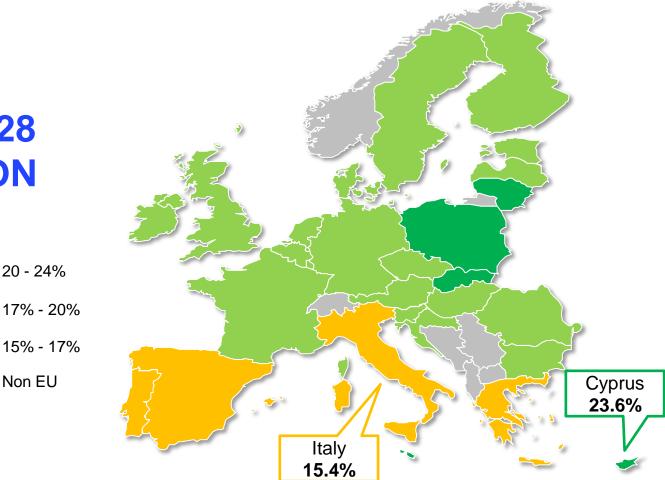






DEBUTION EUROVISION AND EURORADIO Source: EBU based on Eurostat / 15-29 year olds in the EU28 in 2013

18% **OF THE EU28 POPULATION**



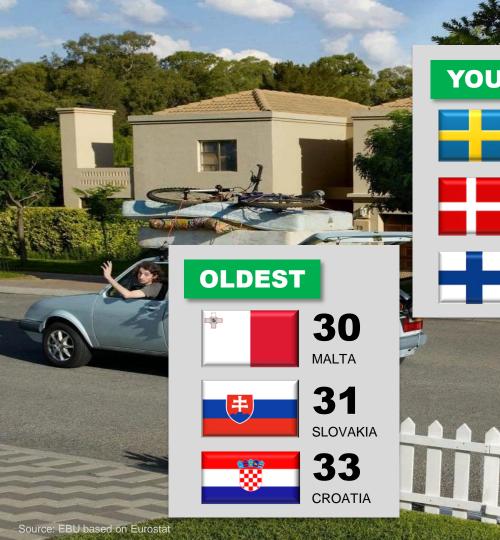
Source: EBU based on Eurostat / 15-29 year olds in the EU28 in 2013

EBU

OPERATING ELIPOVISION AND ELIPORADIC

20 - 24%

Non EU







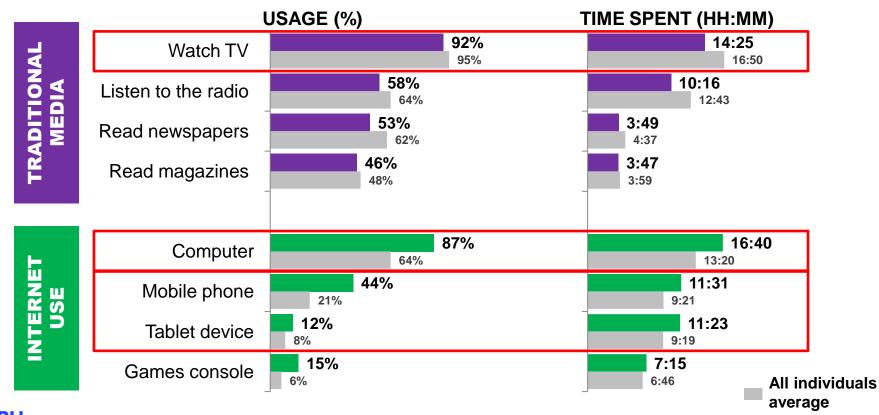


IMPACT ON MEDIA HABITS





WEEKLY MEDIA HABITS OF EUROPEAN 16-24s



CONTRACTING EUROPADIO

Source: IAB Mediascope 2012: In a typical week, which of the following activities you do? / In a typical week, how much time do you spend doing the following activities?

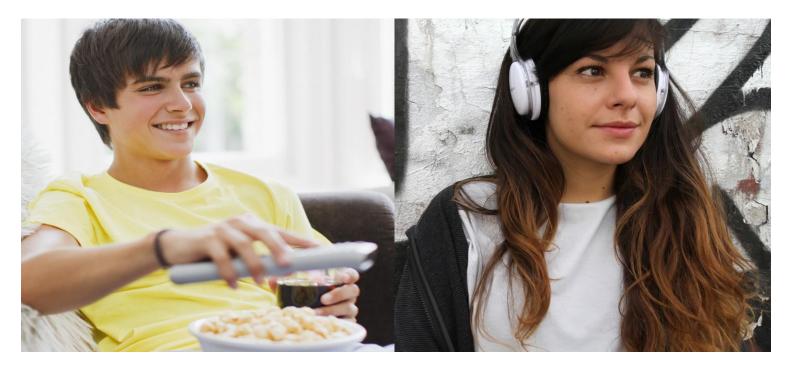


COMMUNICATION



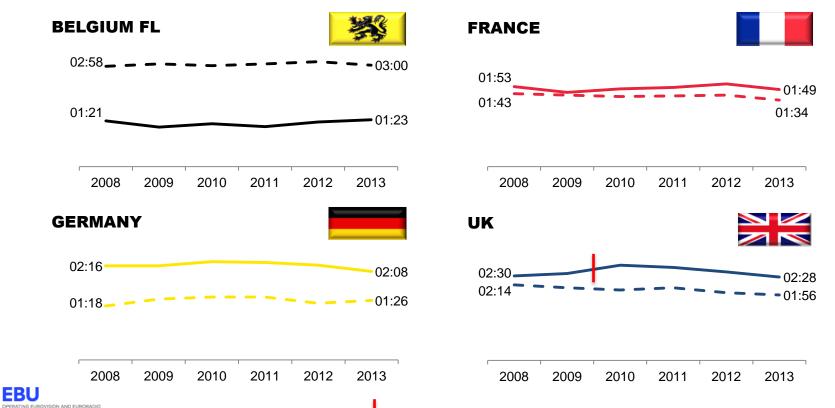


ARE TRADITIONAL TV VIEWING AND RADIO LISTENING TIMES IN DECLINE?



YOUNG ADULTS TV VIEWING AND RADIO LISTENING TIMES



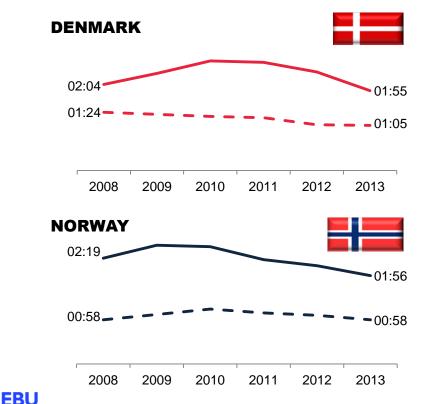


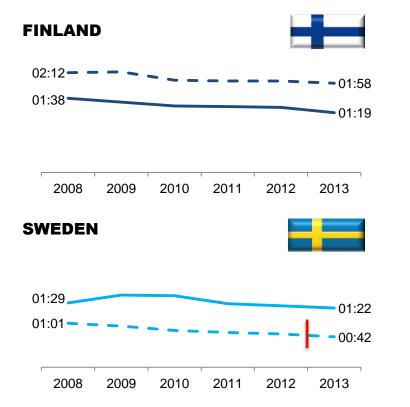
Source: EBU based on Members data

Red line indicates data not directly comparable due to change in measurement system

YOUNG ADULTS TV VIEWING AND RADIO LISTENING TIMES

—— ТV --- Radio





OPERATING EUROVISION AND EURORADIO

Source: EBU based on Members data

Red line indicates data not directly comparable due to change in measurement system

ARE TRADITIONAL TV VIEWING AND RADIO LISTENING TIMES IN DECLINE?



TV VIEWING TIMESRADIO LISTENINGBIGGER DECLINESTIMES IN STEADYIN 2013DECLINE





DISTRIBUTION OF TOTAL TV VIEWING BY DANES

Period: 2013 Target group: 3+ Source: Megafon, TNS Gallup TV Meter TNS Gallup Digital Life, DR Panel, YouGov

ALL

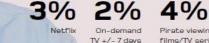




Netflix is the sixthlargest TV channel in Denmark

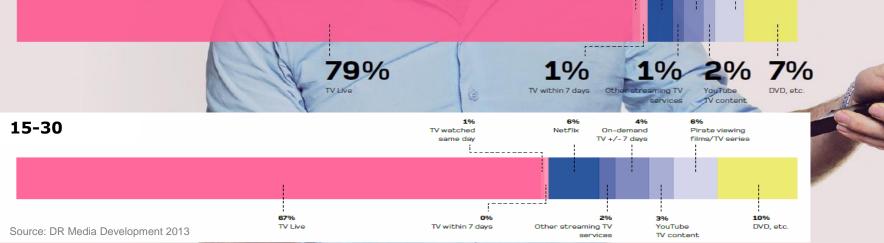
watched

same day



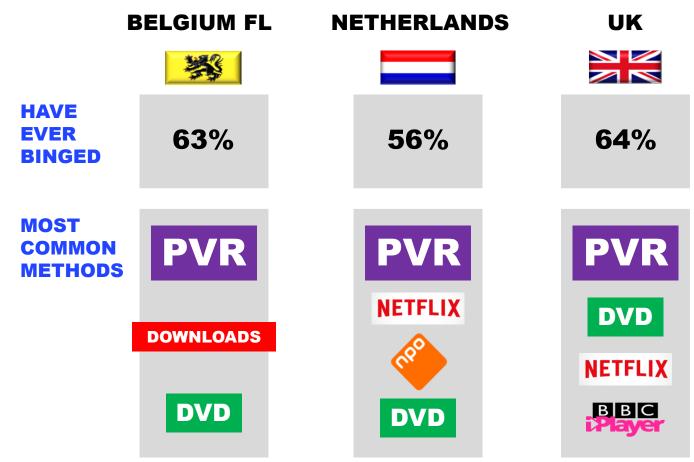
Pirate viewing

films/TV series



BINGE VIEWING

MYTH OR REALITY



COPERATING EUROVISION AND EURORADIC

Source: EBU based on Members data / Q2 2014 panel surveys (VRT, NPO, BBC) / All respondents under 34 years old

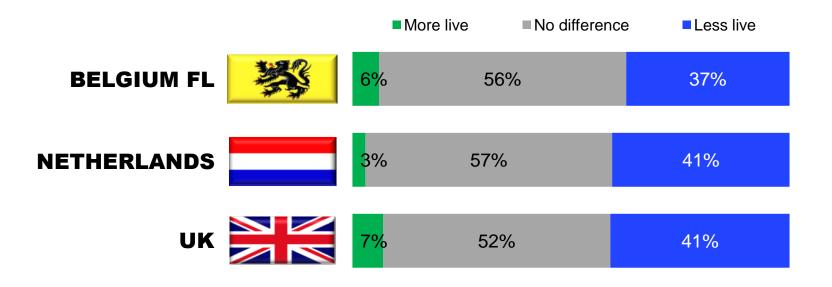
WHAT ARE THEY BINGING ON?



OPERATING EUROVISION AND EUROPADIO Source: EBU based on Members data / Q2 2014 panel surveys (VRT, NPO, BBC) / All respondents under 34 years old

EBU

IMPACT ON LIVE VIEWING

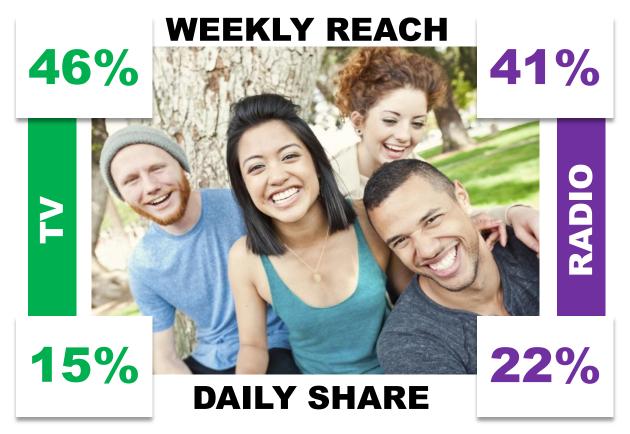


Source: EBU based on Members data / Q2 2014 panel surveys (VRT, NPO, BBC) / All respondents under 34 years old

WHAT ABOUT PSB?



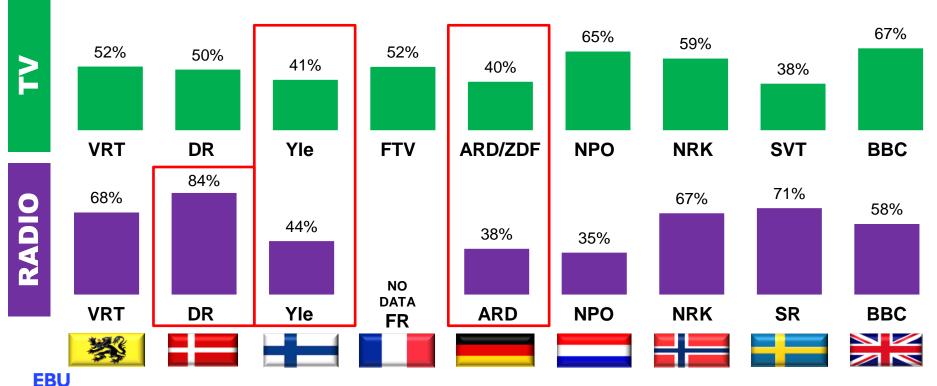
EBU PUBLIC SERVICE ORGANIZATIONS





Source: EBU based on members data, Age basis: 15-24 (may vary slightly by market), Weekly Reach 15+ min consecutive TV: Reach from 25 organizations/Share from 30 organizations. Radio: Reach from 23 organizations/Share from 26 organizations

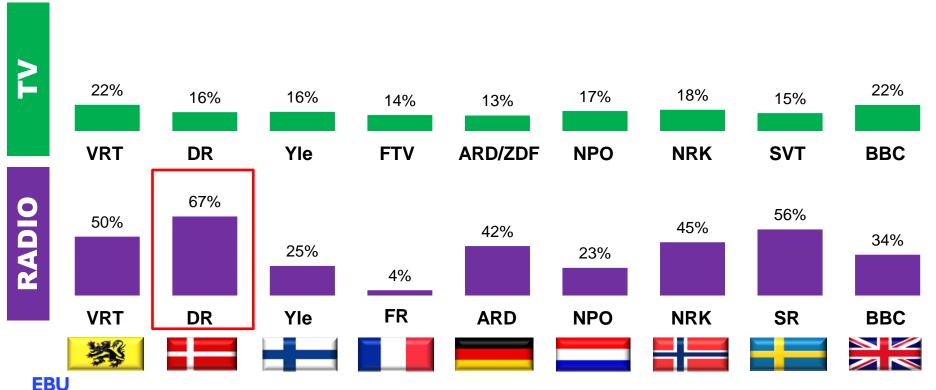
PUBLIC SERVICE ORGANIZATIONS <u>WEEKLY REACH</u> OF YOUNG ADULTS 2013



OPERATING EUROVISION AND EURORADIX

Source: EBU based on members data. Age basis: 15-24s (may vary slightly by market)

PUBLIC SERVICE ORGANIZATIONS **DAILY SHARE OF YOUNG ADULTS 2013**



OPERATING EUROVISION AND EURORADIC

Source: EBU based on members data. Age basis: 15-24s (may vary slightly by market)

KEY QUESTIONS

How can such a diverse group be targeted?

How should content translate across platforms?

How can their high expectations be met?

How are PSB set to face the future?





THANK YOU!

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