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## EXECUTIVE SUMMARY



# PSB TV NEWS: TRENDS AND DEVELOPMENTS

Executive Summary

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# Where is PSB News going ?

## – First Results of the Special EBU Study

The key objective of this EBU special study, launched at the EBU News Assembly 2011, was to gain insight into the profile and coverage of Members' flagship TV News bulletins and rolling news channels as well as their cross-media dimension. The study, using a mixed research approach (member survey, comparative analysis of audience data, case-studies), was carried out by EBU Research in collaboration with the Eurovision News Exchange Secretariat upon commission from the *EBU News Committee* (represented by Mrs. Petra Zilken-Leitgeb, ZDF).

# The Changing Broadcast News Economy

News, and PSB news in particular, is not merely a media product but a vehicle for engagement in the democratic process, feeding off and into domestic politics and international relations. In the early days of PSB News broadcast media for mass audiences had a “talk to all strategy” where PSB journalists acted as news “gatekeepers”. Over the past twenty years many things have changed significantly. The number of weekly hours of TV news in most markets has more than quadrupled since 1985. Over the same period, technology has opened up for real-time coverage of “breaking news” around the globe. *CNN* pioneered with this approach to foreign news and other broadcasters soon followed suit. Today, more than twenty-five years later, news has become a round-the-clock 24-hour commodity offered by a still growing number of public

and private broadcast-, online- and print-press players. Factual programmes are weighing more and more within the rankings. Looking at all top-ten performing programmes in 70 territories in 2010<sup>1</sup>, news programmes drive the best performances in Europe, while factual formats and documentaries are becoming more and more present.

Print and television news media continue to question the future of their industries and seek strategies to success as news consumption shifts from traditional media to the online news media. Although some migration from broadcast and traditional print news media to online news has occurred, the fundamental question is to what extent will online and mobile news media be a complement to or substitute for traditional broadcast news.

## Member Survey: Where is PSB TV News Going?

In Summer 2011, the EBU Research Department, in collaboration with the *Eurovision News Exchange* secretariat carried out an online survey<sup>2</sup> among public service TV broadcast members of the Eurovision News Exchange with the objective of gaining insight into the profile and coverage of Member's flagship TV news bulletins and 24/7 news channels and the

impact of cross-media news flows on PSB TV news output and consumption. Thirty-two Member organisations<sup>3</sup> located in 25 different countries (covering close to 80% of TV households in all EBU member countries) participated in the survey, and gave their perspective on key issues relating to PSB TV news in their specific national, cultural and linguistic context.

1 Source Médiamétrie / EurodataTV..

2 English version: <http://www.surveymonkey.com/s/EBUnewssurvey2011> ;

French version: [http://www.surveymonkey.com/s/MSP\\_news\\_2011](http://www.surveymonkey.com/s/MSP_news_2011)

3 Respondents in **Large European markets**: ARD and ZDF (Germany), *France Télévisions* and *Euronews* (France), RAI (Italy), RTVE (Spain) and *BBC News*, *ITV News*, *ITN – Channel 4 News* (United Kingdom) ; **Medium-size European markets**: *SRG-SSR* (Switzerland), *NOS News* (Netherlands), *VRT* and *RTBF* (Belgium), *ORF* (Austria); **Nordic countries**: *TV2* and *DR* (Denmark), *SVT* (Sweden), *RUV* (Iceland), *YLE* and *MTV3* (Finland) and *TV2* (Norway); **Eastern European countries and the Russian Federation**: *RTR* (Russian Federation), *HRT* (Croatia), *Czech TV* (Czech Republic), *National Television Company* (Ukraine), *RTVS* (Slovenia), *LT* (Lithuania); **Southern European countries**: *TRT* (Turkey), *ENTV* (Algeria), *SNRT* (Morocco), *IBA* (Israel).

# Main Findings

Three types of main broadcast outlets for PSB TV news were examined to highlight differences in coverage and viewer demographics: flagship news bulletins, other “main” TV news bulletins and, if applicable, PSB 24-hour news channels.

## PSB Flagship TV News Bulletins:

The 30 “flagship” TV news bulletins covered in the survey<sup>4</sup> are predominantly programmed in the evening or late-evening slots with an average duration of 40 minutes. According to the respondents the average viewership is 50+ years old, male, middle-class, with a mid- or higher level education and teen-age children, living in urban areas. Many PSBs report difficulties in engaging with younger, active audiences (20-44 years, particularly those with young children) for their traditional real-time broadcast of TV news. In their comments, several respondents stressed the “inclusive” nature of their target audiences and said they were aiming to reach “the whole nation”, “the whole family” or the so-called “general public”.

“Highest audience share” (56%), “Impact” (47%) and “Broadest reach” (43%) were the three most important criteria used to define the “Flagship” TV news bulletin.

The content focus of the flagship TV news bulletins over the past 18 months was mainly geared towards national/regional news. The degree of coverage of foreign news varies strongly between Members, depending on the size of the national market and the scope of the public service remit and structure of the broadcasters concerned. In addition to

national and international stories, over the last 12 months the top-scoring thematic areas were society news, sport news and weather, followed by Local/Regional news. “Society/Justice news”, chosen for *TRT1 Main News*, *RAI1 TG1*, *RTSR Téléjournal*, *VRT 7u Journaal* – is the thematic coverage area which most frequently comes up as the second most important thematic coverage area. Seventeen organisations also provided information regarding the top areas of coverage of their other main news bulletins. Compared to the “flagship” TV news bulletins, a stronger emphasis is put on national news and societal news (justice, science, culture, human interest), which all scored higher than sports news and weather.

Almost all organisations played all their top news stories across several media (TV, radio, online and mobile apps). Often they used their own websites to provide exclusive back-story, portraits or local “diaries” of events/unfolding news stories. A similar trend was found for the top stories in the other main news bulletins.

The top-stories listed by the respondents corresponded to the main categories of coverage. National news concerned national elections, financial issues and/or major white-collar legal and financial scandals. As for international news, the Euro-zone crisis and “Arab Spring” were high on the PSB news agenda. Natural disaster stories such as the Haiti earthquake, the Japanese Tsunami and the Icelandic ash-cloud are also frequently mentioned<sup>5</sup>. The list of top-stories for the “other main news bulletins” shows greater topical diversity and a stronger focus on national news stories of all sorts, including local culture stories.

<sup>4</sup> *Udalosti* (Czech TV), *JT20h* (ENTV), *Dnevnik 2* (HRT), *Daily News program Mabat*, *Weekend News Magazine* and *Foreign News report* (IBA), *ITV News@Ten*, *Kymmenen uutiset* (Ten o'clock news, MTV3), *TRT Main News*, *19 Nyhederne* (TV2 Denmark), *TG1* (RAI Uno), *Main news* (SNRT), *Heute 19Uhr* (ZDF), *Channel 4 News* (ITN), *Telejournal 19h30* (RTS), *Vesti* (RTR/Russia 1), *Le 20 Heures* (France2), *Panorama* (LTV1), *Zeit im Bild* (ORF), *BBC News@Ten*, *Frettit* (RUV), *Tageschau* (ARD), *Tagesthemen* (ARD), *Rapport 19h30* (SVT), *Aktuelt* (SVT), *7u Journaal* (VRT), *Eight O'clock bulletin* (Nos News), *TV Uutiset ja sää* (YLE), *Telediario 1* and *Telediario 2* (RTVE).

<sup>5</sup> Certain respondents indicated top stories from 2011, whereas the wording of the survey question referred to 2010, ie. the last full year. Accordingly, results relating to this question should be seen as a complementary indication of the main content focus areas for PSB news.



## PSB 24-Hour News Channels:

Over a third of the participating PSBs set up a dedicated news channel between 1986 and 2006<sup>6</sup>. In 2010 the average daily audience shares of the responding organisations varied between 0.1% and 3.2% (CT24).

As stated by *Euronews*, the PSB 24-hour news channels clearly target the more economically, politically and culturally active segments of the audience. The audience profile of these channels is somewhat similar to that of the flagship bulletins, but younger, more technologically savvy, predominantly male, with a higher social-grade and income levels.

Content-wise, stronger impetus is given to international, business and sport news compared to the content focus of the main TV broadcast news bulletins. In terms of coverage, 87% of the PSB 24-hour news channels focus on national news coverage. The most popular second choice was "International news" (62%), and the third choice "Business news" (62%). Fourth and fifth choices went toward "soft stories", weather and sports news. *Czech TV* indicated "the areas of coverage basically mirror those mentioned in the flagship news bulletin side. All of the areas and stories were given more time on *CT24* (Czech Republic) than in the main news bulletin, the variety was obviously wider but similar in substance."

## Multi-platform / Multi-screen Distribution of PSB Broadcast News

Few PSB news organisations now doubt the crucial role social media plays in breaking down barriers to engagement, opening up newsgathering networks, and as an additional outlet for PSB journalism. PSBs' own news

websites, followed by *Facebook* and *Twitter* are the three most important cross-media outlets for PSB news content. Diversification and increase of distribution, broadening of audience reach of the broadcasters news brands in general (and amongst younger audiences in particular) are the three most cited reasons behind PSB's multiplatform / multi-screen strategies (81% of the respondents) for PSB news content. *TRT* (Turkey), followed by *ITN* (United Kingdom), *SVT* (Sweden), *RAI* (Italy), *Euronews*, *BBC News* (United Kingdom), *ARD* and *ZDF* (both Germany) were the most new and social media savvy respondents all using a broad array of new forms of audience outreach and interaction.

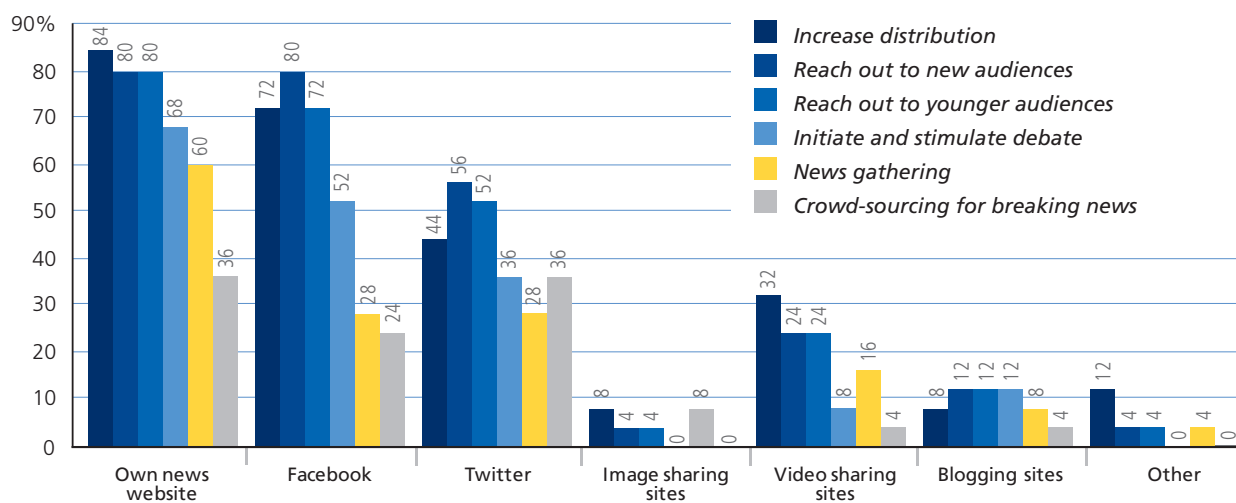
As new forms of audience outreach become increasingly widespread, many Members have set-up internal guidelines for the usage of social media by their news staff with a view to controlling the reputation and the brands of their organisation. As in the case of the *BBC's* official Twitter guidelines<sup>7</sup>, these rules are generally based on common sense and professional, journalistic standards and "mindfulness".

Increase of distribution and reaching out to new, younger audience segments are the three most frequently quoted types of outreach (81% of respondents for all three). It is interesting to note that over 50% of the respondents use their website and social media presence to initiate and stimulate debate (55%), mainly through own websites, or via *Facebook* and *Twitter*. Crowd-sourcing for special news topics and "breaking news" only concerns 32% of the respondents including *TRT* (Turkey), *MTV3* (Finland), *Euronews*, *Czech TV*, *TV2 Denmark*, *ITV News*, *ITN Channel 4* (United Kingdom), *SSR-SRG* (Switzerland), *SVT* (Sweden) and *NOS News* (Netherlands).

<sup>6</sup> CT24 (Czech TV), TV2 News (TV News Denmark), DR Update (DR), 24Horas(RTVE), RAI News(RAI), Almagreb24 (SNRT), Journaal24 (NOS), Politiek24 (NOS), Russia24 (RTR), BBC News Channel, BBC World News, TRT News and TRT Turk.

<sup>7</sup> [http://news.bbc.co.uk/2/shared/bsp/hi/pdfs/14\\_07\\_11\\_news\\_official\\_tweeter\\_guidance.pdf](http://news.bbc.co.uk/2/shared/bsp/hi/pdfs/14_07_11_news_official_tweeter_guidance.pdf)

## TV flagship news bulletins : Forms of social media outreach & usage



Source: EBU based on Members

The key function of the PSB news blogs, written by senior editorial staff, is used to extend the conversation with the viewers and to initiate and stimulate democratic debate. One example is the blog *The Editors*<sup>8</sup> where editors from across *BBC News* share dilemmas and issues linked to news and its production. *RAI* (Italy), *ITN* (United Kingdom) and *RTVE* (Spain) also mentioned the running of blogs as part of their audience outreach practices.

Close to 70% of the respondents make more than half of their TV news broadcasts available through non-linear distribution channels, and this mainly via their own websites. More than half of the organisations concerned provide full online distribution of their broadcast news output.

*ITV News*, *ITN*, *BBC News* (United Kingdom), *France Télévisions* and the Flemish broadcaster *VRT* make 100% of their broadcast TV news available through non-linear distribution channels. *SVT* (Sweden) delivers close to 100% of its news contents via these distribution channels and *ZDF* (Germany) 90%. In both cases the content not available for online distribution concerned mainly news items

relating to sports events for which ancillary distribution rights are not available. *YLE* (Finland), *NOS News* (The Netherlands) and *ARD* (Germany) make 50% of their broadcast news available, whereas *RTR* (Russian Federation) and *RTVE* (Spain) currently provide less than 30% of their output via non-linear distribution forms.

PSB News organisations aim to respond to new non-linear forms of news consumption, from live online streaming of TV broadcasts, catch-up services to mobile / smart phone applications. Respectively 84% and 69% of the respondents make their news bulletins available via live-streaming and catch-up TV services. Smartphone and mobile applications are another front-running category of non-linear distribution forms used for PSB broadcast news. Enhanced services such as Connected TV services providing access to news archives such as the *ARD Mediathek*<sup>9</sup> or the *ZDF Mediathek*<sup>10</sup> or the *BBC Connected TV* news product<sup>11</sup> are the most prominent types of extensions of existing PSB news content and brands onto new media platforms and services.

<sup>8</sup> <http://www.bbc.co.uk/blogs/theeditors/>

<sup>9</sup> providing access to the regional broadcasters and the "Tageschau" news offer and voting services, cf. <http://www.ardmediathek.de/>

<sup>10</sup> <http://www.zdf.de/ZDFmediathek/hauptnavigation/startseite>

<sup>11</sup> The BBC News product for connected TV, announced in June 2011, has been designed as a complement to the BBC's live 24-hour news channel. Editorial teams in the newsrooms will curate clips around the clock to run alongside text-based news from BBC News Online – all started, stopped, and navigated via the remote control. Cf. [http://www.bbc.co.uk/pressoffice/pressreleases/stories/2011/06\\_june/17/news.shtml](http://www.bbc.co.uk/pressoffice/pressreleases/stories/2011/06_june/17/news.shtml).



## PSB Cross-media News Production & Newsroom Integration

The level of newsroom integration is high amongst PSBs. Between 80% and 95% of the respondents have either partially or fully integrated all functions in their newsrooms. Workflows are tailored around the specific needs and complexity of 24-hour news, especially by those organisations that have launched a 24-hour news channel.

Better use of resources and improved workflow, both tools allowing PSBs to face up to the new economic realities of the news business, were cited as the two most important advantages for newsroom integration.

A perceived narrowing of the opportunity to grow journalistic talents within specific media or topic areas was seen as an important disadvantage for over half of the respondents, with the perceived long-term risk, of journalists becoming a “jack of all trades”. Over forty per cent of the respondents had noted a certain “fatigue” with their viewership of being served the same content on all media platforms, gradually undermining the distinctiveness of news genres and individual media outlets (TV, radio, Internet).

Fifty-two per cent of the respondents experienced significant cuts in their news budget over the past twelve months. Multimedia, social media and newsgathering were nevertheless three categories for which an increase in investment was foreseen for the coming year. Close to two-thirds of the respondents said that the level of investment in editorial, newsgathering and newsroom functions remained at the same level as before. The responses regarding future areas of investments and skill-set development both point to the fact that PSB newsrooms are in the midst of a fundamental organisational and structural change, going from a linear production process focused on a limited number of daily TV news bulletins (as it was the case until the mid-nineties) to the complex, non-linear, cross-media, ubiquitous world of 24-hour news of today. Nevertheless, core journalistic and news writing skills for specific media are still nurtured as illustrated by the

replies of a third of the respondents who include these as one of the areas of future skill development. The creation of new types of positions in the PSB newsrooms were either related to multi- and social media anchoring and editorial filtering, central planning of news production and development of business-to-business news services.

## Newsgathering and Choice of Sources of Information

Three aspects of PSB newsgathering were examined in the survey: the size and main locations for domestic and foreign correspondent bureaus, subscription to general and television news agencies and the editorial practices put into place with regard to filtering and on-air usage of User Generated Content (UGC).

Operating a large network of foreign news bureaus is a high cost related to the delivery of PSB news, and as the pressure on costs increases in general for all PSBs, many organisations have been forced to reallocate resources between their own foreign correspondent/bureau network, subscriptions to major news agencies and the use of alternative sources of news /footage / coverage (such as content provided by the public), notably for breaking news, building stories and coverage of events in conflict zones. Twenty-two percent of the respondents had between one and five domestic bureaus, 26% six and ten, 4% 11 and 15, 22% 16 and 20 and 13% 2 and 25. Close to 80% of the respondents' domestic news bureaus are organised by major region, or in major cities. As for the foreign bureaus, 50% had between 10 and 20 bureaus. The foreign news bureaus are located in three main geographical regions: Europe (91% of respondents), North America (91%) and Asia & Pacific (72%), followed by the Middle-East (63%), Africa (50%) and South America (41%). When asked to indicate the most important locations in terms of staffing, Brussels and Washington DC were both mentioned by 61% of the respondents. Moscow came in third followed by London and Berlin. Other main locations mentioned were Sarajevo, Paris, the Middle-East, China and Stockholm.

*Reuters, Associated Press and Agence France Presse* are the three most subscribed-to editorial press agencies. As a second or third choice many PSBs also mentioned their main national general press agencies.

Over half of the respondents have set up an internal news agency hub to distribute and share information among all their journalists working both for separate and cross-media news.

Opinions regarding the use of User Generated content varied widely. Two respondents, *Euronews* and *SVT* (Sweden), indicated that they had doubled the use of UGC. Thirty per cent said that they had increased their usage by 50-100%. Over half of the respondents indicated they had increased their usage of UGC by less than 30% over the past five years. For one respondent, this type of source was only considered for the coverage of “breaking news” stories, while another was of the opinion not to consider it at all.

As stressed by one of the respondents, UGC is treated as *raw material* needing to go through strict editorial checks of the source as well as validation by experts, and is only to be broadcast if clearly identified as a third-party addition to news items produced by

the broadcaster. The four main limitations to usage of content generated by the public mentioned by the respondents were the reliability and trustworthiness of the source, the inferior technical quality of the footage, copyright clearances issues as well as organisational/staff related limitations. One member also questioned the newsworthiness of much of this type of content in general.

A large majority of respondents have set up editorial standards and procedures regarding the usages of UGC for the news production and broadcasts (larger PSBs tend to have instituted and increased verification process which includes both checking of the source and cross-checking of facts with experts by a specialised editorial staff. ). For the large PSBs such as *BBC News* (United Kingdom) the filtering is handled by an experienced team in *Newswire* including language specialists for the content relating to foreign news. Others leave the filtering of this type of content to ad hoc editorial decisions based on common journalistic quality standards. Many of the broadcasters who frequently use this type of content for their newsgathering and/or on-air coverage of breaking news stories have adapted editorial procedures, and have therefore set up special web sites to capture and filter such content.<sup>12</sup>

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<sup>12</sup> *TRT* (<http://www.trthaber.com>), *MTV3* (<http://www.mtv3.fi/uutiset>), *CT24* (<http://master.ceskatelevize.cz/ct24/vase-zpravy/nahraj/>), *RTR* ([mreporter.ru](http://mreporter.ru)), *BBC News* (<http://bbcnewsupload.streamuk.com/>) or *VRT* (<http://deredactie.be/cm/vrtnieuws/contact/1.921492>). Another example of a hub for broadcast news related crowd-sourcing is *CNN International's "Ireporter"* (<http://www.ireport.cnn.com>).

# Long-term evolution of PSB News Audience Shares

In the framework of this study, and in view of understanding how PSB news audiences have evolved over the past ten years EBU Research also collected and analysed audience data and demographic profiles, covering 80 main TV news bulletins and twenty-four 24-hour news channels, provided by Members based in 25 different countries.<sup>13</sup>

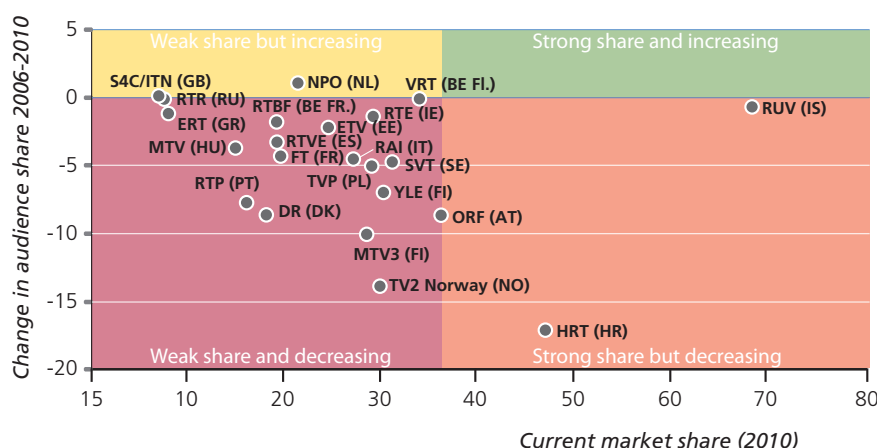
## Main TV News Bulletins

In 2010 the average audience share per broadcaster for all the main TV news bulletins for which data was made available ranged

from 7% (*RTR*, Russian Federation) to 68% (*RUV*, Iceland).

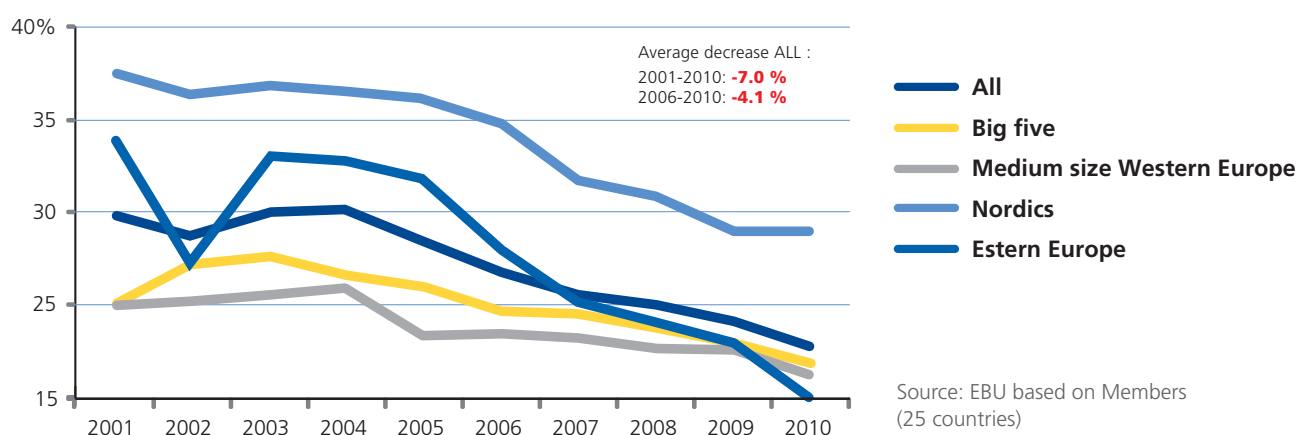
Over the past 10 years, PSBs' main TV news bulletins have experienced a seven per cent decrease in total average audience share, from 29.8% in 2001 down to 22.8% in 2010. Broadcasters in the Nordic countries show the highest total average audience share (29% in 2010) for their main TV news bulletins. The largest decrease in total regional average market share occurred in Eastern/Central Europe & the Russian Federation with a 14.2% drop between 2001 and 2010.

**Main TV bulletins : Evolution of average audience shares per broadcaster 2006-2010 / Current shr (2010)**



Source: EBU based on Members

**Main PSB News Bulletins : Evolution of TOTAL average audience share 2001-2010**



Source: EBU based on Members (25 countries)

<sup>13</sup> Austria, French- and Flemish-speaking Belgium, Switzerland, Czech republic, Denmark, Estonia, Spain, Finland, France, United Kingdom, Greece, Croatia, Hungary, Ireland, Iceland, Italy, Norway, Netherlands, Poland, Portugal, Romania, Russian Federation, Sweden, Slovak Republic, Ukraine.

Between 2006 and 2010, none of the flagship evening TV news bulletins of broadcasters based in the five big European markets<sup>14</sup> saw an increase in their average daily audience shares. The average decrease for the period was 2.8% down from 24.7% in 2006. Except for the Welsh-language news bulletin *Newyddion* of *ITN/S4C* (7.5% in 2010) and *France 3's* late evening bulletin *Soir3* (7.4%), the 2010 market shares for the main news bulletins in this region vary between 16% (*Heute, ZDF*) and 38.7% (*BBC1 Breakfast News*). Changes in shares varied between +6.1% for the *BBC1 Breakfast News* programme to -7.3% for *France 3's* national Evening news programme *19-20 Journal national*.

The main TV news bulletins in the six medium-size Western European countries<sup>15</sup>, had a total average audience share of 21.3% in 2010, down from 25.1% ten years before. In 2010, the shares varied between 52% for *VRTeen's Het 1 Uur* and 2.1% for *ERT1's* lunch-time *Noon News* programme. Compared to similar programmes in the five main European markets, a higher number of the main news bulletins (16 out of 28) achieved increases in their average audience shares varying between 10.5% and 0.2% over the past five years. Evening and late-evening flagship TV bulletins generally maintained stable or increased shares with the most important increases registered for *Nederland1's Journaal 8Uur* (shr 30.9% in 2010, up +5.5% since 2006) or *VRT een's Het 7 Uur* (shr 46.7% in 2010 up 6.6% since 2006).

The total average audience share for the main TV bulletins in the five Nordic countries (29% in 2010) was significantly higher than the overall average. Shares for the flagship TV news bulletins the shares varied in 2010

between 68.1% (*RUV Frettitir*) and 22% for *YLE2's TV-Uutiset 18h50*. Nevertheless, the total average share decreased by 7.5% from 37.6% in 2001. Only two bulletins out of 17 news bulletins covered registered an increased or stable share over the past five years. *TV2 Norway's Nyhetene og Sporten* saw an 18 per cent drop from 52% in 2006 to 34% in 2010. Several of the early evening bulletins such as *MTV3's Seitsemän Uutiset 19h* (shr 27.4 in 2010 down 15.3% since 2006) or *YLE2's TV uutiset 18h* (share 37% in 2010 down 11% since 2006) had a decrease in shares above 10%.

The main TV news bulletins of Eastern/Central European and Russian broadcasters<sup>16</sup>, saw the highest drop in average shares since 2006, with an 8% decrease to 20% in 2010 from 28% five years earlier. In 2010 the audience shares varied between 58.3% for *HRT's* lunch-time news bulletin *Dvenik U Podne* down to 1.5% for *RTR Zvezda's Novisti Dnia* news bulletin.

During the course of this study, ageing audience was frequently mentioned as a key concern for the PSB flagship news bulletins. A closer look at the evolution of the average age of viewers between 2006 and 2010 showed an increase of almost one year from 55 years in 2006 to almost 56 years in 2010, in line with the general demographic evolution of the European population. There are exceptions to this trend. For example, two sets of data relating to the viewership of all *BBC* news bulletins (average age down one year in 2010 from 56 years in 2006) as well as the regional edition of *France 3's* lunch-time news bulletin *12/13 regional*, show a slight decrease in average age (0.1% drop over five years).

<sup>14</sup> Germany, Spain, France, Italy and the United Kingdom.

<sup>15</sup> Data was made available for broadcasters in Austria, French- and Flemish-speaking Belgium, Greece, Ireland, Netherlands and Portugal.

<sup>16</sup> Data was made available for broadcasters in the Czech Republic, Estonia, Croatia, Hungary, Poland, the Russian Federation and the Slovak Republic.

## PSB 24-Hour News Channels

24-hour news channels are forming an increasingly important part of the news landscape. Audience data available for both private and public service 24-hour news channels show that 24-hour news is a narrow but steadily increasing niche market with competitive features closely linked to the national news economies.

News channels take 1 to 2% of the total TV audience in the most developed countries. Czech TV's *CT24* (shr 3.4% and reach 13.85% in 2010) channel and *TVP Info* (shr 4.9% and reach 23.87% in 2010) are currently the two 24-hour news channels which achieved the highest market shares in 2010. In France, news channels such as *LCI*, *BFM* and *France24* gather 1 million viewers, compared the traditional broadcast TV news of main PSBs which may reach 15 million viewers during mid-day and 23 million in the prime-time. Private news channels like *N24*<sup>17</sup>, *n-TV*<sup>18</sup> (both Germany), *BFM*, *iTélé*, *LCI* (all three: France)<sup>19</sup> target young and educated urban dwellers with higher than average incomes. They are often based on hard news during the week (especially business/finance, politics, "Breaking news")<sup>20</sup> whereas PSB News channels, like *BBC News*, *RAI News* or *DR Update* target broader audiences.

In large European countries, two national 24-hour news channels typically lead the market (*BBC News*, *Sky News* in the United Kingdom, *n-TV*, *N24* in Germany for example). They are watched on average 1-3 minutes per adult per day.

## Non-linear & Online Consumption of PSB TV News

TV news consumption is still predominantly via traditional live broadcast television 98-99% of PSB TV news viewing, with a slowly increasing share of non-linear/time-shifted viewing) Accordingly most national *Television Audience Measurement* (TAM) systems focus on tracking this type of viewing. Some PSBs (who have already diversified their news outlets within the framework of a multi-screen strategy) such as *RTE*, *NPO* and *VRT* now seek to keep track of the usage of its multi-screen and multi device news-products. Their existing audience measurement systems are either adapted or new metrics added to monitor changes in the level and demographics of usage of both traditional TV and these new types of appliances. Nevertheless, the media industry has to settle on how to measure audiences as it becomes more and more difficult to get a full sense of consumer behaviour across the growing variety of news sites, platforms and devices.

<sup>17</sup> *N24* (<http://www.n24.de/>) is part of the *RTL Group*.

<sup>18</sup> *n-TV* (<http://www.n-tv.de/>) is part of the *ProSieben-Sat. 1 Group*.

<sup>19</sup> *BFM* (<http://www.bfmtv.com/>) is a private channel part of the *RMC Group*; *LCI* (<http://lci.tf1.fr/>) is part of the *TF1 Group* and *iTélé* (<http://www.itele.fr/>) of the *Canal Plus Group*, both Members of the EBU via the "Groupement des radiodiffuseurs français de l'UER".

<sup>20</sup> Cf Krüger, Udo Michael: "Programmprofile von n-tv und N24. Entwicklung und Positionierung der beiden privaten Nachrichtenkanäle in deutschen Fernsehmarkt" (2008), published in *Media Perspektiven* N1/2008 p.2-14.

# Outlook and Forth-coming Report

Audiences become multichannel and less likely to consume news at a predefined time of the day, plus they have a larger choice of platforms and devices through which they can access PSB news. Accordingly viewers/citizens not only want to be informed in a different way, but also wish to take an active part in the news process as commentators, followers and news providers. PSB broadcast news and current affairs programming remain the most powerful information media<sup>21</sup>, in spite of the steady rise of the Internet as the place where people get “most of their news about national and international issues”<sup>22</sup>.

In this fragmented and increasingly competitive news landscape, the key challenge is to deliver diverse and demographically desirable audience

stakeholders for news and current affairs, notably via PSB 24-hour news channels and distribution of PSB news “products” across multiple platforms and devices (e.g *Smart phones, tablet computers, Hbb/ConnectedTV*).

With regard to the evolution of news audiences, the full written report of the EBU News Study will also take a look at the differences in demographic audience profiles for Members news bulletins, and provide an update of recent news media consumption research. Several case studies done in collaboration with the News and audience research departments of Members, will provide a detailed and hands-on perspective on how key challenges for cross-media news production and distribution are met.

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<sup>21</sup> OECD, Committee for information, computer and communication policy / Working party on the Information Economy : “The Evolution of News and the Internet”, June 2010. DSTI/ICCO/IE(2009)14Final. <http://www.oecd.org/dataoecd/30/24/45559596.pdf>; see also the results from the biennial media consumption surveys of The Pew Research Center for the People & the Press : <http://www.people-press.org/2008/08/17/news-attitudes-and-habits/>

<sup>22</sup> Pew Research Center for the People & the Press, [http://stateofthemediamedia.org/files/2011/07/sotm\\_final\\_2011.pdf](http://stateofthemediamedia.org/files/2011/07/sotm_final_2011.pdf)







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