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OPERATING EUROVISION AND EURORADIO

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AUDIENCE TRENDS
TELEVISION 2023
PUBLIC VERSION

MEDIA INTELLIGENCE SERVICE
JULY 2023

ABOUT THIS REPORT

This report provides an overview of the evolution of television audience consumption between 2017 and 2022, based on official currency data from national Television Audience Measurement (TAM) systems across the EBU Member countries. The official currency data varies from live broadcast viewing only to some time-shift and catch-up viewing on the TV set, and in some countries on-demand viewing on other screens.

In this report, Television audience trends are benchmarked across countries using common metrics of time, reach and market share.

The full television market is presented using time spent viewing and weekly reach data.

The performance of public service media (PSM) television services is presented using weekly reach and daily market share data.

All data points are provided for all European Citizens (individuals) and European Youth (15–24-year-olds), as younger audiences are an important but often difficult group for public service media to reach. This report aims to show both the similarities and differences in youth TV consumption behaviour from the overall population.

In addition, the profile of total TV viewers and PSM TV viewers has been included for the second year.

RELATED REPORTS

To provide a holistic picture of media consumption trends, alongside this TV audience report the Media Intelligence Service also publishes:

AUDIENCE TRENDS: RADIO



This complimentary report covers Radio audience trends for the same period 2017-2022. Based on national Radio Audience Measurement (RAM) currency data. Tracking listening time and radio reach for the markets, and Reach of PSM radio services and their market share,

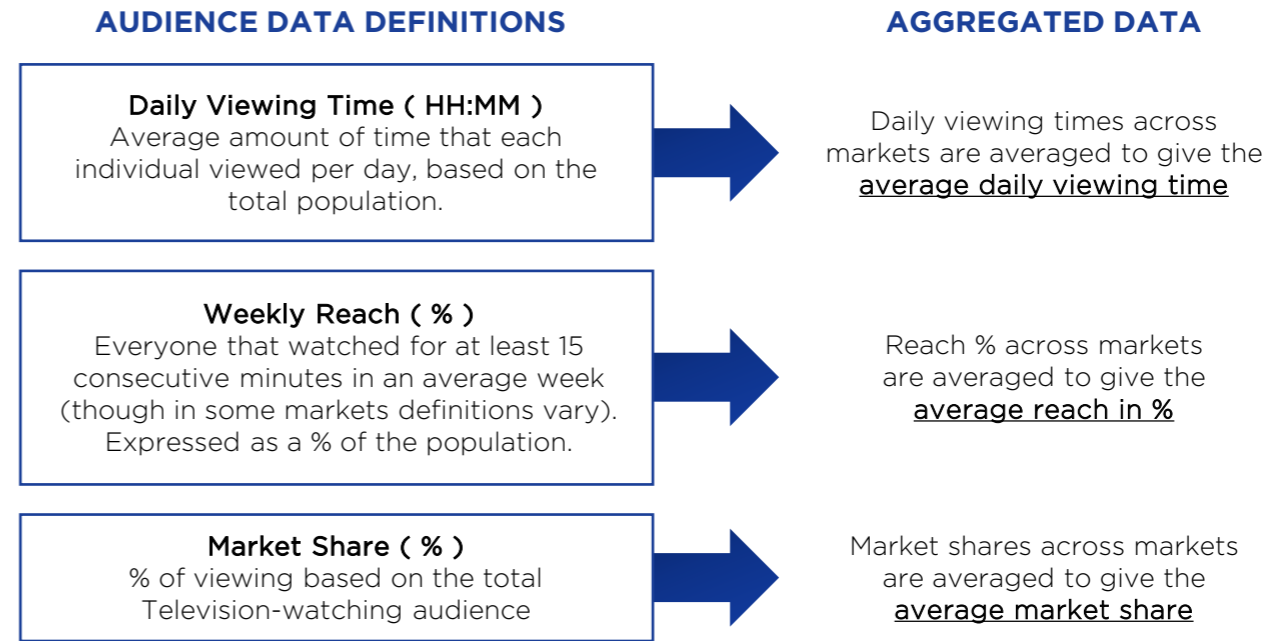
DIGITAL MEDIA CONSUMPTION TRENDS



This report explores media-related behaviour beyond traditional TV viewing and radio listening, providing a complete picture of changing and emerging media consumption behaviour.

METHODOLOGY

- This report is based on national Television Audience Measurement (TAM) data, provided by EBU Members through the Media Intelligence Survey and the GEAR network and supplemented with data from Glance / relevant partners.
- Year-on-year evolutions for each market are only reported for those with comparable figures. All those with methodological differences have been excluded.
- Aggregated evolutions are based on markets with complete historical series.
- PSM weekly reach and PSM market shares refer to EBU PSM organizations and, when available, non-EBU national PSM.
- Youth age group refers to 15- to 24- year-olds, though some market definitions vary slightly.



SCOPE OF THE REPORT DATA

REPORTED DATA INCLUDES LIVE BROADCAST AND WHERE AVAILABLE TIME-SHIFTED VIEWING UP TO 7 DAYS AFTER THE LIVE BROADCAST

On-demand viewing outside of the 7-day catch-up window is typically not included. Some markets are measuring viewing of non-broadcaster content from VOD services and YouTube, but it is not included in the currency TAM data unless it is bundled in with unmatched viewing and reported as part of total time spent.

VIEWING INCLUDED IN REPORT		VIEWING OUTSIDE OF REPORT SCOPE
IN ALL MARKETS	IN SOME MARKETS	
Live broadcast TV viewing	BVOD catch-up Up to 7 days	BVOD catch-up (after 7 days) and archive
IN MOST MARKETS	Other TV screen usage/Unmatched usage (e.g. DVDs, gaming, unmatched VOD, YouTube, Radio, etc.)	Other VOD services (e.g. Netflix, Prime, Disney+, etc.)
Time shifted TV viewing up to 7 days		

TIME-SHIFTED VIEWING (TSV)

Time-shifted viewing refers to non-live viewing of TV broadcaster-related content watched via a TV set, including viewing from personal recorders and catch-up or archive content available to view on the TV set. In markets with router meter measurement, catch-up on other devices may also be captured if the content has been tagged and can be identified.

Although the possibility to time-shift and watch catch-up content is available in all markets, it is currently only measured in 38 out of 42 EBU area markets with TAM data. Greece was the latest market to launch TSV measurement in 2022.

In most markets, time-shifted viewing includes both viewing time-shifted on the same day as the live broadcast (known as VOSDAL) and all catch-up viewing up to 7 days after the live broadcast. There are only three markets with variations to this standard definition; Germany which uses up to 3 days, the Netherlands up to 6 days and in Türkiye, the measurement captures up to 7 days, but the currency is based on 2 days.

It is not uncommon for the measurement to capture more than what is included in the currency. In some markets time-shifted viewing up to 28 days (or more) may be captured but the decision is taken by the market for the trading currency data to maintain as the standard, up to 7 days only. This is the data that is provided in this report.

For full details of the measurement in each market please refer to:

- ➔ [EBU-MIS PSM TV Audience dataset](#) for the data in this report. All data as well as definitions.
- ➔ [EBU-MIS Measuring Total Audience Report](#) for a general overview of national TAM currencies
- ➔ [egta insights on innovation in total TV measurement report](#) for a detailed description of the most advanced national TAM currencies

KEY FINDINGS - TELEVISION AUDIENCE TRENDS

EUROPEAN CITIZENS



EUROPEAN YOUTH



89%

LIVE TV VIEWING

86%

EUROPEAN CITIZENS



EUROPEAN YOUTH



DAILY TELEVISION VIEWING TIME

DECLINES CONTINUE IN THE POST-COVID PERIOD

After the viewing time peak brought by the COVID period in 2020, the post-COVID years 2021-2022 have seen a significant decline in viewing time for European citizens and European youth. In 2022, the decline was more marked than in previous years with European Citizens viewing time dropping to its lowest of the 5-year period. Viewing time stood at 3h 22m, down 14 minutes on 5 years ago.

Among youth viewing time stood at 1h 18m down a more significant 28 minutes on 5 years ago. Among youth, there were 8 markets in 2022 with an average daily viewing time of under 30 minutes, compared with just 4 markets in 2021 and none 5 years ago.

TIME-SHIFTED VIEWING

MAJORITY OF TELEVISION VIEWING CONTINUES TO BE LIVE VIEWING

Linear television viewing remains for the most part live. That said, there were 6 markets in 2022 with over 20% of time-shifted viewing, compared with just 1 market 5 years ago. For youth, there were 9 markets with over 20% of time-shifted viewing in 2022, compared with 5 markets 5 years ago.

WEEKLY TELEVISION REACH

CONTINUES STEADY DECLINE SEEN IN PREVIOUS YEARS

Although most people continue to be reached by television every week, there is a gradual decline over the longer term, with a more notable decline for younger people.

Weekly reach stood at 80.4% in 2022, down 5.9 percentage points on 5 years ago. There were 11 markets in 2022 with an average weekly reach below 80%, compared with just 2 markets 5 years ago.

Among youth, weekly reach stood at 55.6% in 2022, down 14.5 percentage points on 5 years ago. Among youth, there were 24 markets in 2022 with an average weekly reach below 60%, compared with just 6 markets 5 years ago.

KEY FINDINGS – PSM TELEVISION AUDIENCE TRENDS

EUROPEAN CITIZENS



EUROPEAN YOUTH



PSM WEEKLY TELEVISION REACH

STEADY DECLINE IS IN LINE WITH TOTAL TELEVISION REACH DECLINE

PSM weekly reach also experienced a decline in recent years, these declines are in line with that of total television.

PSM weekly reach stood at 56.3% in 2022, down 2.4 percentage points on the previous year and down 7.0 percentage points on 5 years ago.

PSM youth weekly reach stood at 28.2% in 2022, down 3.2 percentage points on the previous year and down 9.0 percentage points on 5 years ago. Although the decline among youth was stronger over the 5-year period; it was not as strong as the drop for total television among youth (down 14.5 percentage points).

Among youth, there were 13 markets with an average weekly reach below 25%, compared with 8 markets 5 years ago.

EUROPEAN CITIZENS



EUROPEAN YOUTH



PSM DAILY MARKET SHARE

PSM SHARE CONTINUES TO GROW OVER THE LONG TERM

PSM daily market share stood at 23.4% in 2022, down 0.2 percentage points on the previous year but up 0.4 percentage points on 5 years ago.

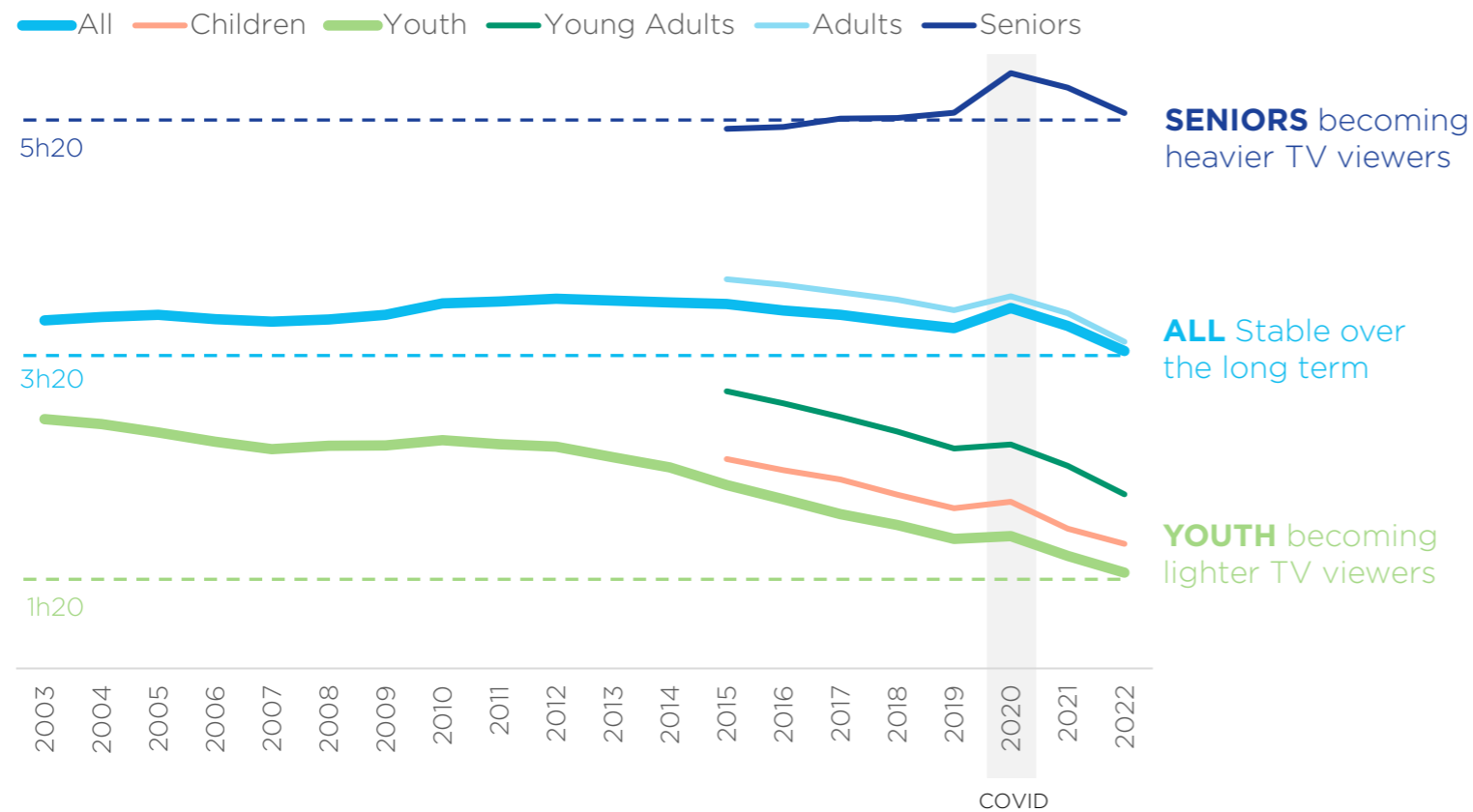
Among youth PSM daily market share stood at 17.4% in 2022, down 0.3 percentage points on the previous year but up 2.3 percentage points on 5 years ago.

While the television market, in general, is in decline when we look at time spent and reach, the positive performance of PSM's daily market share suggests that PSM is better at retaining its audience (both old and young) than its competitors.

However, PSM must keep in mind the context and balance the positive share of viewing with reaching fewer people for less time with their television services alone. They must look to all types of media consumption across all their services to truly understand how well they reach all citizens.

STABLE TELEVISION VIEWING TIME OVER THE LONG TERM HIDES OPPOSING TRENDS AMONG YOUTH AND SENIOR TARGET GROUPS

EBU AREA DAILY AVERAGE TV VIEWING TIME EVOLUTION BY TARGET GROUP



European citizens watch a little less television now than they did two decades ago. Looking back to 2003 the overall trend in Europe is that TV viewing is in minor decline. However, when we compare the data by target groups, we see there is a clear divide between under-35-year-olds and over-35-year-olds. With older viewers maintaining their viewing time and younger age groups becoming lighter viewers.

Younger viewers watching less TV than older viewers is not a new trend. Looking back at the past 20 years shows under 35 years old have always watched less TV than older citizens. Youth (14-25-year-olds) have always been the lightest TV viewer group and seniors (60+-year-olds) have always been the heaviest viewer group.

Competition for screen time grows ever stronger, from commercial players but also from PSM own services. Making content available to watch on all platforms at any time, means citizens are already adopting all-new ways to connect with content. Therefore, it is not surprising to see some decline in TV viewing time in recent years, and broadcasters can perhaps accept some decline in TV viewing as they work to reach citizens elsewhere. [You can find more on these trends in the EBU-MIS Digital Media Consumption Trends report.](#)

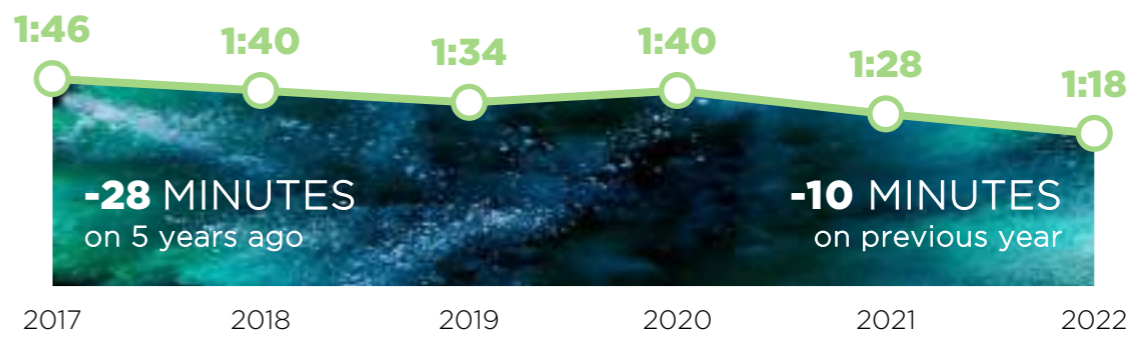
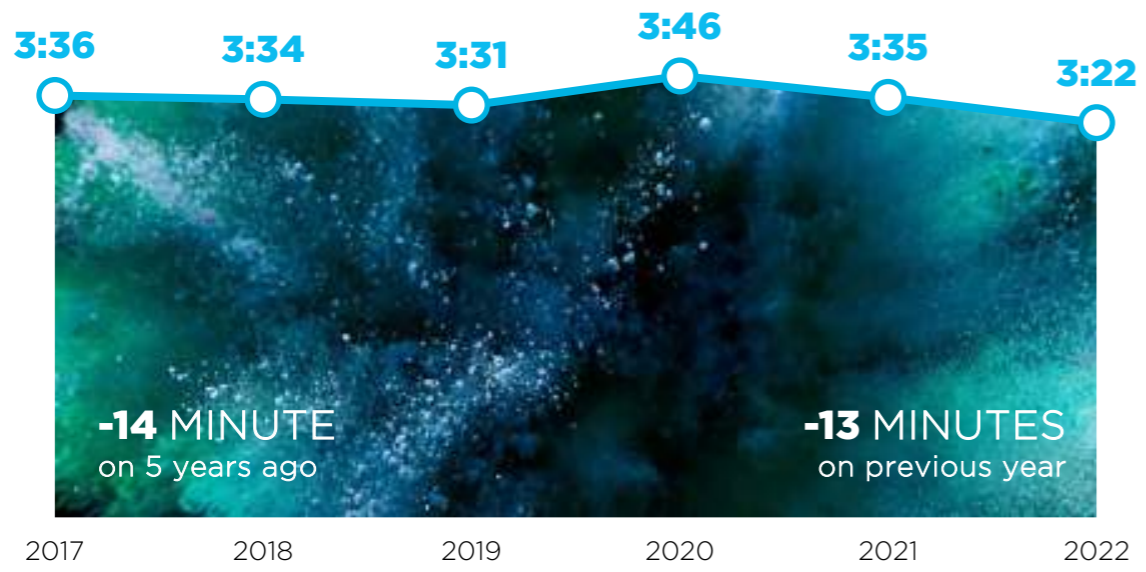
Comparable tv viewing time data for All individuals and youth available for 20 years, all target group data available since 2015.
Age definitions: Children 4-14, Youth 15-24, Young Adults 25-34, Adults 35-59, Seniors 60+. Definitions may vary slightly by country.
Source: EBU based on Members' data. Note: trend based on 21 EBU Area markets.

TELEVISION VIEWING TIME DECLINES IN POST COVID PERIOD

**IN 2022
EUROPEAN CITIZENS
WATCHED**
on average



**IN 2022
EUROPEAN YOUTH
WATCHED**
on average

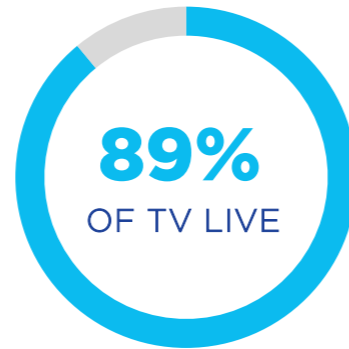


MAJORITY OF TELEVISION VIEWING CONTINUES TO BE LIVE VIEWING

IN 2022 EUROPEAN CITIZENS WATCHED

on average

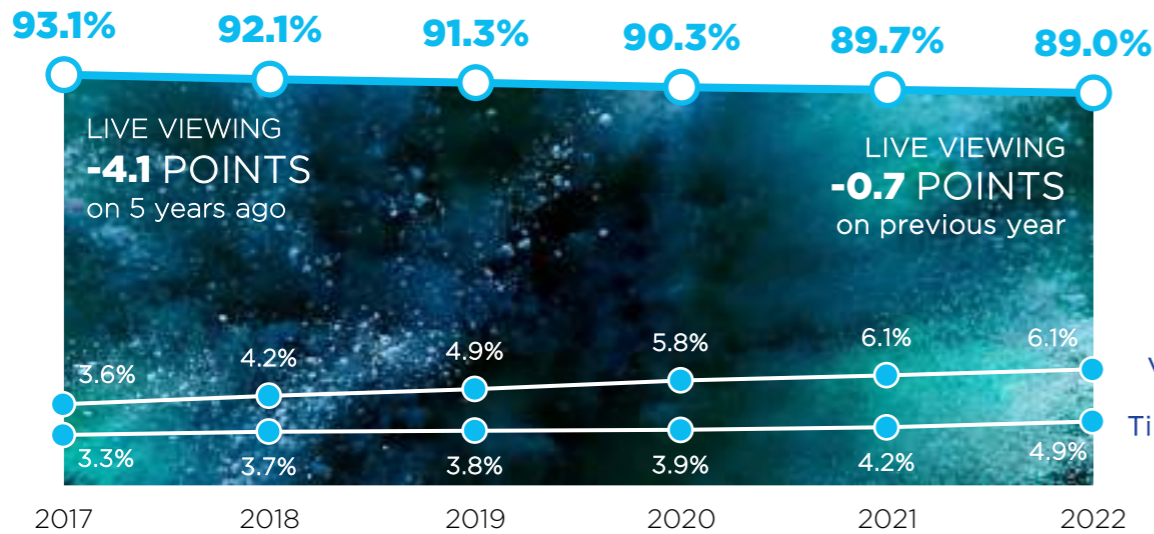
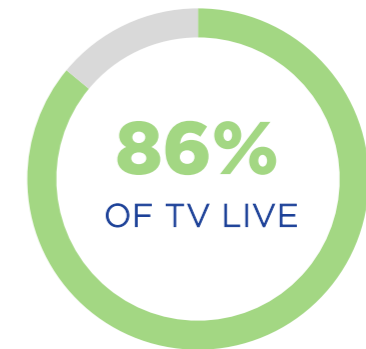
11% OF TV TIME-SHIFTED



IN 2022 EUROPEAN YOUTH WATCHED

on average

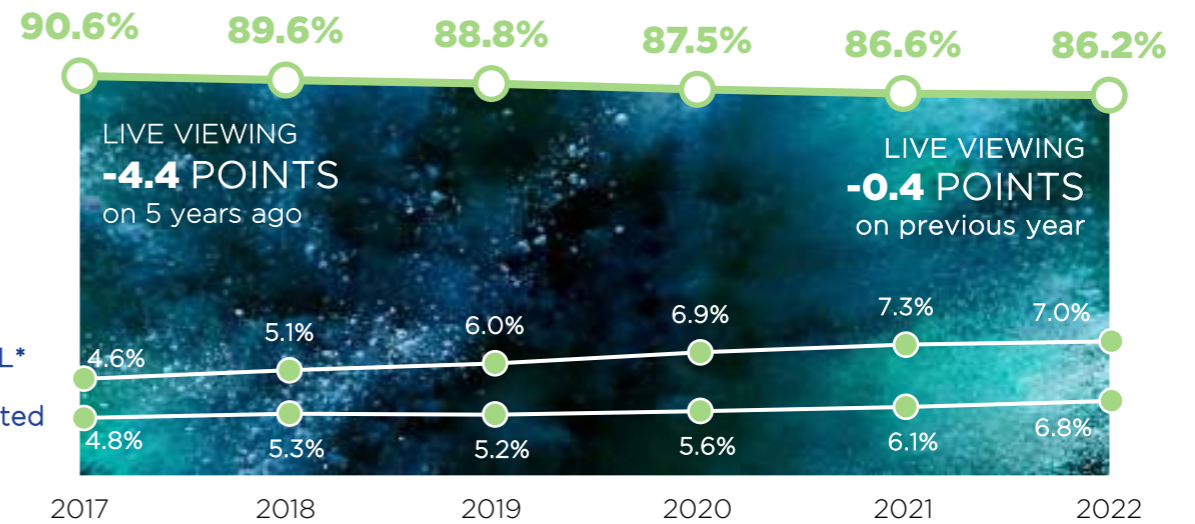
14% OF TV TIME-SHIFTED



LIVE

VOSDAL*

Time-shifted



TELEVISION WEEKLY REACH CONTINUES STEADY DECLINE

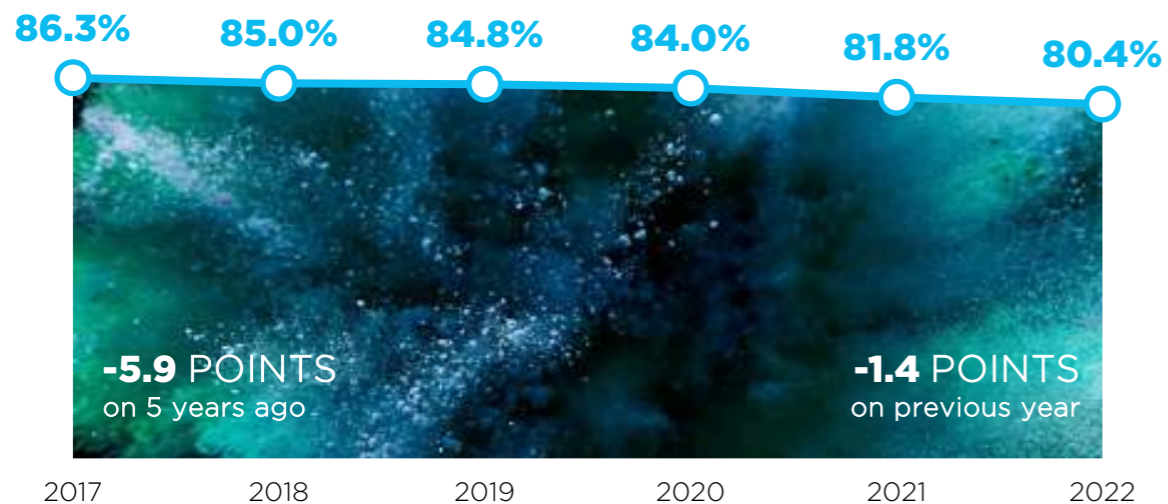
**IN 2022
EUROPEAN CITIZENS
REACHED**

by television



**IN 2022
EUROPEAN YOUTH
REACHED**

by television



PSM TELEVISION WEEKLY REACH DECLINE IN LINE WITH TOTAL TV

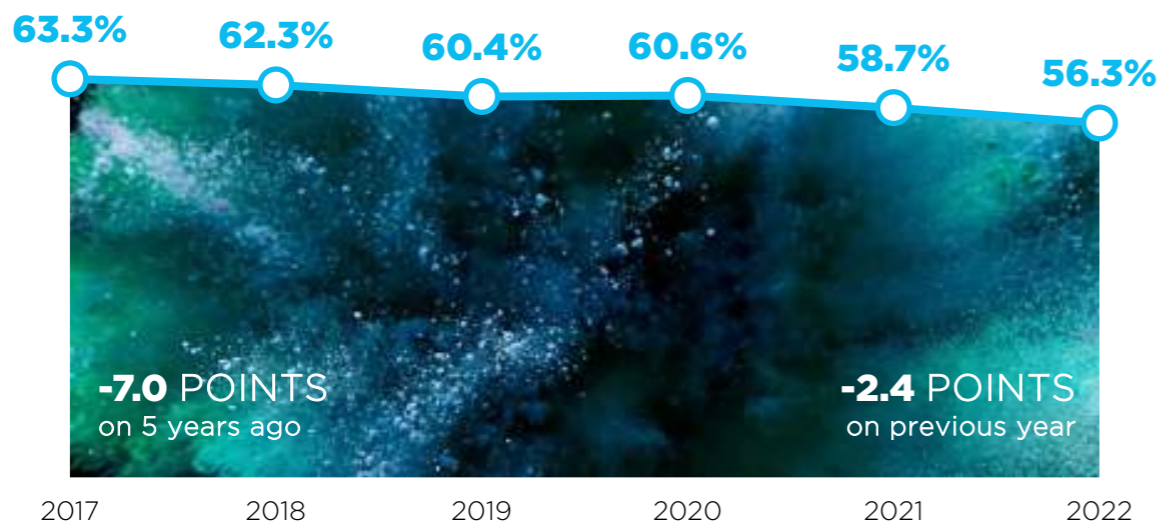
**IN 2022
EUROPEAN CITIZENS
REACHED**

by PSM television



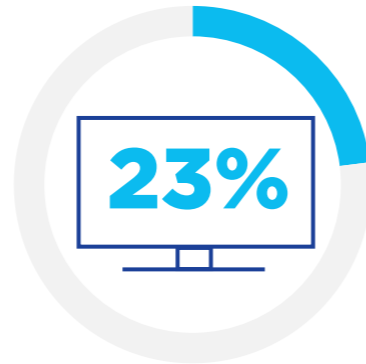
**IN 2022
EUROPEAN YOUTH
REACHED**

by PSM television

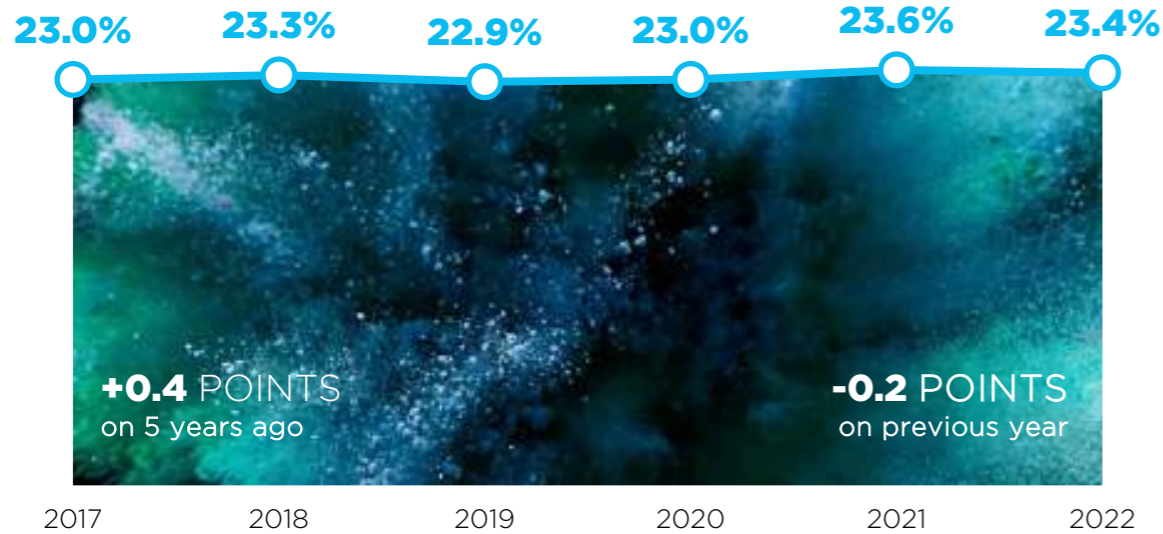
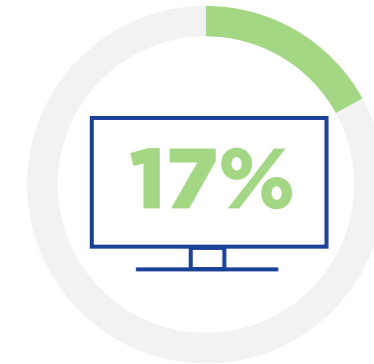


HIGHEST PSM TELEVISION MARKET SHARE OF PAST 5 YEARS IN 2022

Average PSM television
MARKET SHARE
IN 2022
 among
EUROPEAN CITIZENS



Average PSM television
MARKET SHARE
IN 2022
 among
EUROPEAN YOUTH



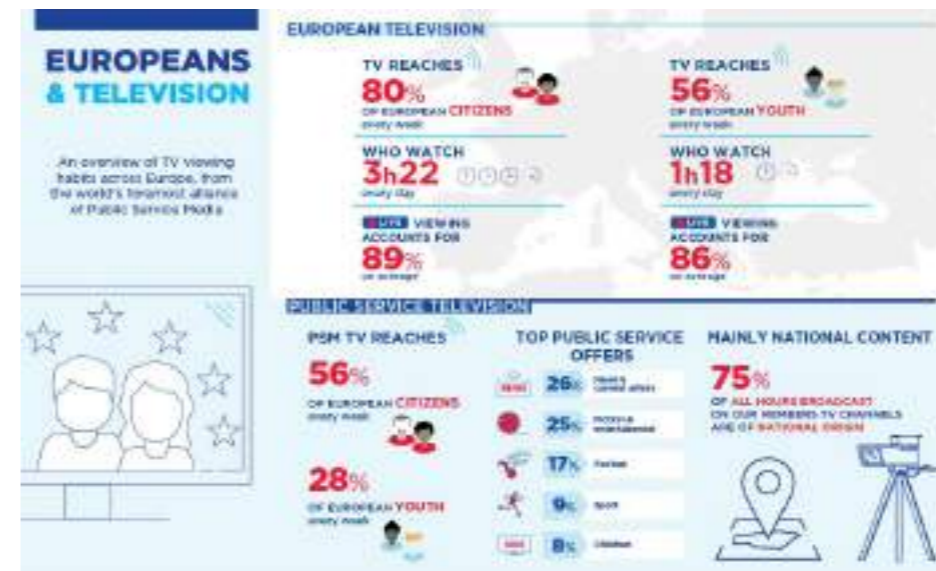
WHAT SHOULD I READ NEXT?



[AUDIENCE TRENDS: RADIO 2023](#)

If you liked this report, why not take a look at the Audience Trends: Radio 2023 report. This report presents daily viewing time, weekly reach and PSM market share for all individuals and youth from 2023 and offers data over a 5-year range.

[Download full report here](#)



[EUROPEANS & TV INFOGRAPHIC](#)

This infographic is a collection of interesting key facts about Europeans & television. Take a look.

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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.

mis@ebu.ch

PUBLICATION

Produced by:
Francesca Cimino
cimino@ebu.ch

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