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OPERATING EUROVISION AND EURORADIO

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MARKET INSIGHTS **TRUST IN MEDIA 2020** SLIDE DECK

MEDIA INTELLIGENCE SERVICE

APRIL 2020

ABOUT THIS PROJECT

In the age of media abundance, trust is important in the relationship between media and their audience. However, maintaining a high level of trust is more and more challenging in a world of news overflow and disinformation. Measuring trust is therefore essential for tracking citizens' perceptions of the media system in general and a media organization and its output in particular. This is crucial for audience building and useful for the organization's strategic planning.

What is trust?

- Trust is an individual's perception of the reliability of other individuals and institutions and the result of socio-economic conditions, education and long-standing perceptions.
- Media organizations can work to increase trust in the medium and long term by championing credibility and authenticity.
- However, the results will not only be related to their performance and values but also to external factors beyond the organizations' control, e.g. cultural or economic factors.
- In organizations with substantial societal relevance, such as public service media, trust is also related to social responsibility.

How is it measured?

There are several annual studies that measure the level of trust in media. For this report the results of the Standard Eurobarometer were used:

- A public opinion survey by the European Commission, currently conducted by TNS.
- Analyses public opinion on a variety of topics, e.g. the image of the European Union, the economic situation, or citizens' main concerns.
- Published twice a year, the autumn edition contains research on trust in media and other institutions.
- Each edition is based on approximately 1,000 face-to-face interviews in 33 countries (EU states as well as acceding and candidate countries), respondents aged 15 and over.
- Available at <http://ec.europa.eu/COMMFrontOffice/PublicOpinion/>

METHODOLOGY

This report is primarily based on data from the 92nd Standard Eurobarometer, where the Net Trust Index is deducted from. The 92nd wave of the survey was conducted in November 2019 in the 28 EU member states and the five candidate countries. In the section about trust in news, the Reuters Institute Digital News Report 2019 is used as an additional source, whereas the section on trust and COVID-19 is based on survey data from GlobalWebIndex, Reuters Institute, British regulator Ofcom and EBU member organizations.

Eurobarometer

The question asked in the Eurobarometer survey is:

'I would like to ask you a question about how much trust you have in certain media and institutions. For each of the following media and institutions, please tell me if you tend to trust or tend not to trust it.'

Respondents may also answer 'do not know'. The types of media included are radio, television, the written press, internet, and online social networks.

Net Trust Index

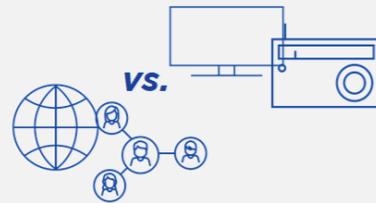
The Net Trust Index has been developed by the EBU Media Intelligence Service to obtain an idea of the level of trust each country's citizens have in the different types of media. The Net Trust Index is defined as the difference between the percentage of the population who answered 'tend to trust' and 'tend not to trust' to the survey question, not taking into account 'do not know' replies. The index can range from a minimum value of -100 to a maximum value of +100. A dataset with the historical development of the Net Trust indexes for each media and country covered since 2009 is available online.

Reuters Institute Digital News Report

The annual study commissioned by the Reuters Institute for the Study of Journalism analyses how news are consumed in a range of countries. The online survey research was conducted by YouGov at the end January/early February 2019 and reflects the online population of each country, comprising 38 markets worldwide, 26 of which in Europe. This report will be updated once the 2020 edition is published.

KEY FINDINGS

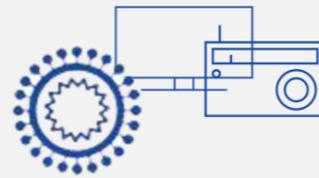
The trust gap between broadcast and online media persists



Radio and TV continue to be the most trusted media throughout Europe. Radio is most trusted in 73% of European countries surveyed, TV in another 9%.

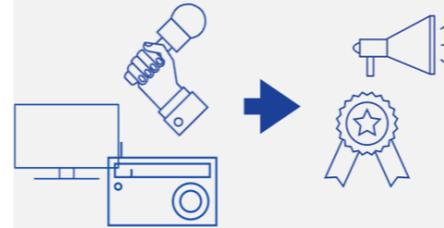
By contrast, social networks are least trusted in 85% of the countries. The internet and social networks continue to receive much lower trust levels than traditional media.

High trust in PSM news during times of crisis



Scoring as most trusted news brand in 16 European markets, PSM are also ranked among the most trustworthy sources of information on the COVID-19 crisis in several countries. Reflecting usage patterns of getting informed about the coronavirus outbreak, citizens tend to put more trust into TV news coverage of the crisis compared to radio reporting.

Press freedom correlates with trust in radio and TV



The higher the level of trust in a country's radio and TV, the higher press freedom tends to be in that country.

The strong correlation suggests that in the European context, citizens' trust in broadcast media is closely connected with a free and independent media landscape.

Low perceived pressure on PSM goes along with trust in news



The more citizens perceive PSM in their country to be free from political pressure, the higher the level of trust in the information provided by national media. Independent PSM are a key element of a credible news media landscapes.

KEY FINDINGS

Social networks are trusted the least



Social networks are by far the least trusted media across Europe. In 28 of 33 countries, social networks are the media that people trust the least. Only in five South Eastern European countries, other media are even less trusted.

While social networks are widely used to get information about COVID-19, the gap between usage and the trust expressed is particularly high.

Traditional media receive more trust than politics



EU citizens only trust their national army and police more than radio. TV and the written press rank in the middle third, slightly less trusted than the legal system or public administration.

The internet scores just slightly better than national governments and parliaments, whereas only political parties are less trusted than social networks.

Trusted news means less concern about misinformation



In countries with high levels of trust in national news, citizens are less likely to perceive false information as a problem.

There is a strong negative correlation between the perceived trustworthiness of information provided by national media and the perception of misinformation as a problem within the country.

Trust is complicated

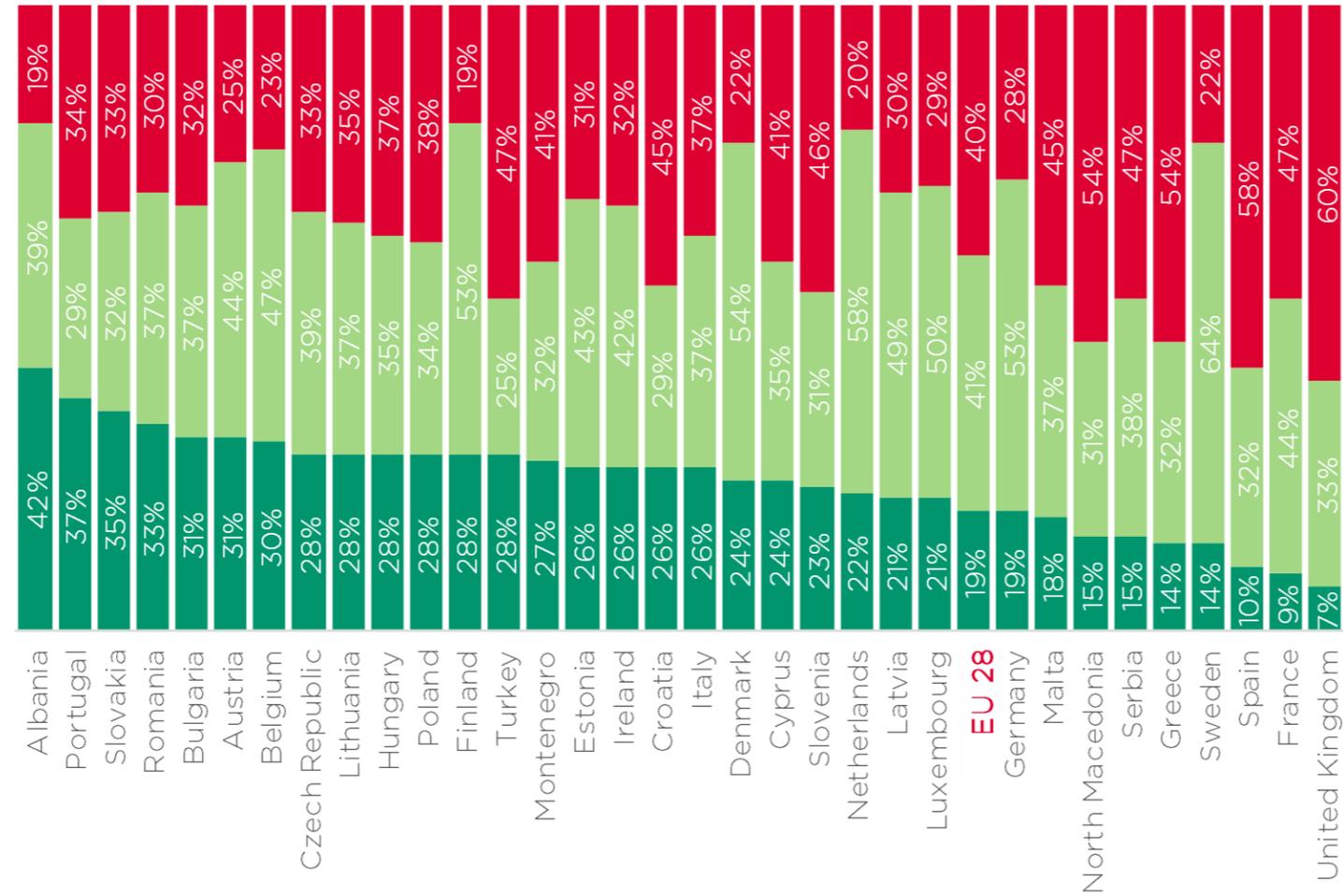


The questions used in trust surveys differ considerably, partly explaining contradictory results on whether trust in media is shrinking or on the rise – and highlighting how multidimensional “trust” is.

Investigating on, investing in and renegotiating trust are key performance markers for quality media such as PSM.

TRUST IN MEDIA

(% of population, 2019)



High trust



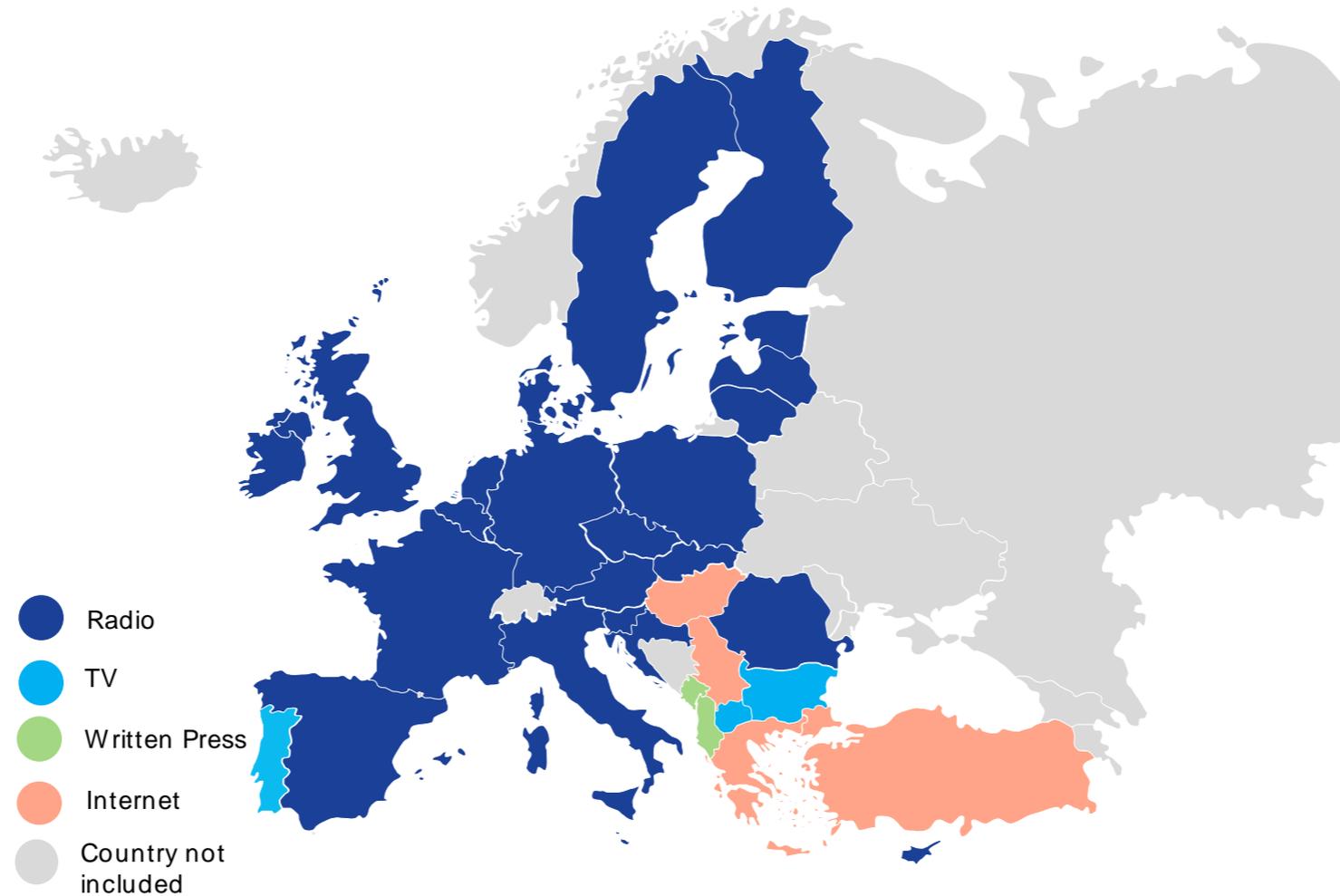
Medium trust



Low or no trust

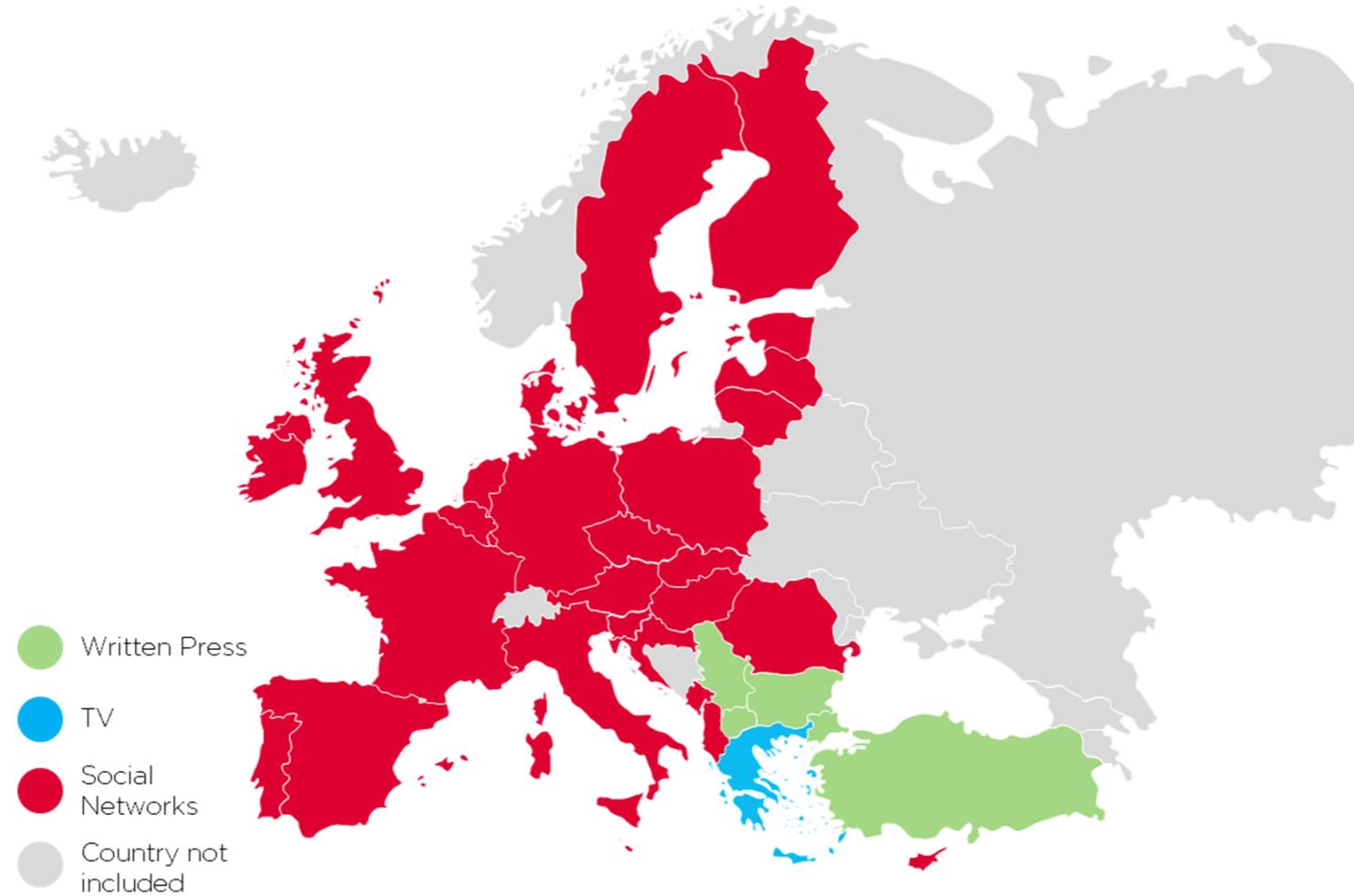
MOST TRUSTED MEDIA

(Net Trust Index 2019)



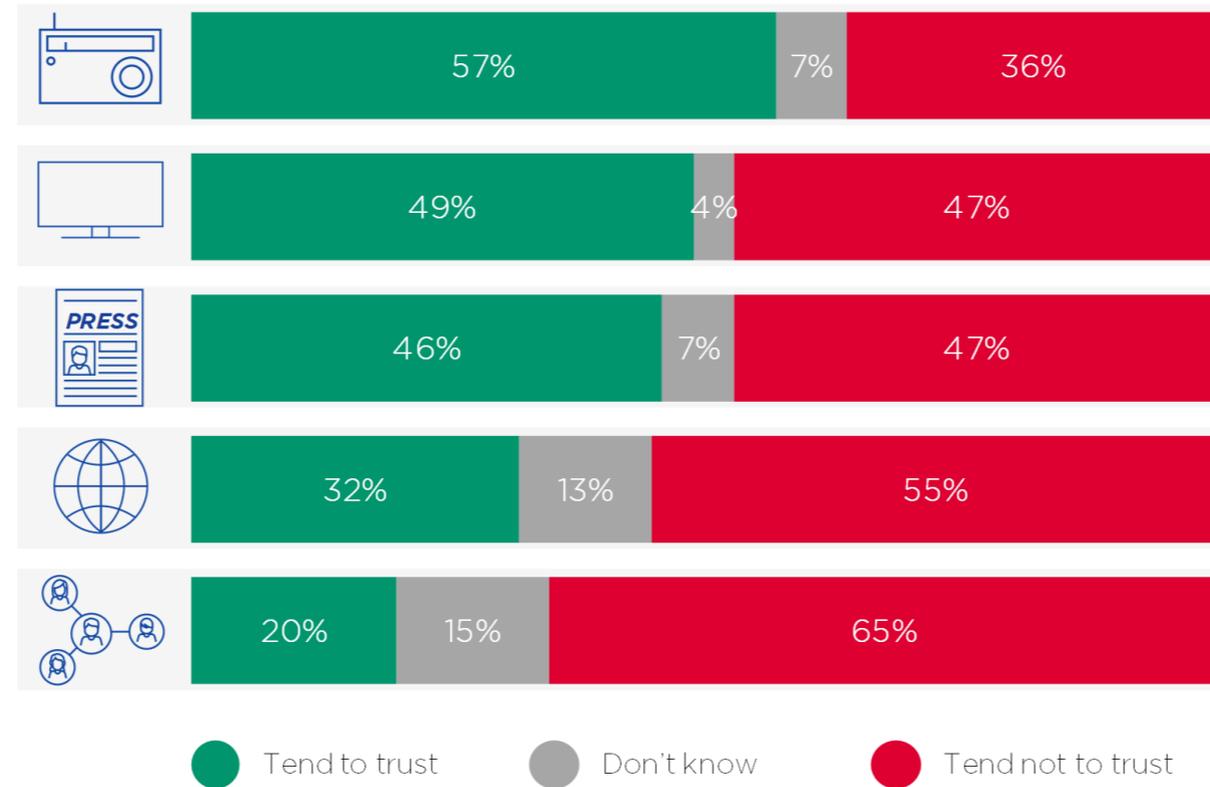
LEAST TRUSTED MEDIA

(Net Trust Index 2019)



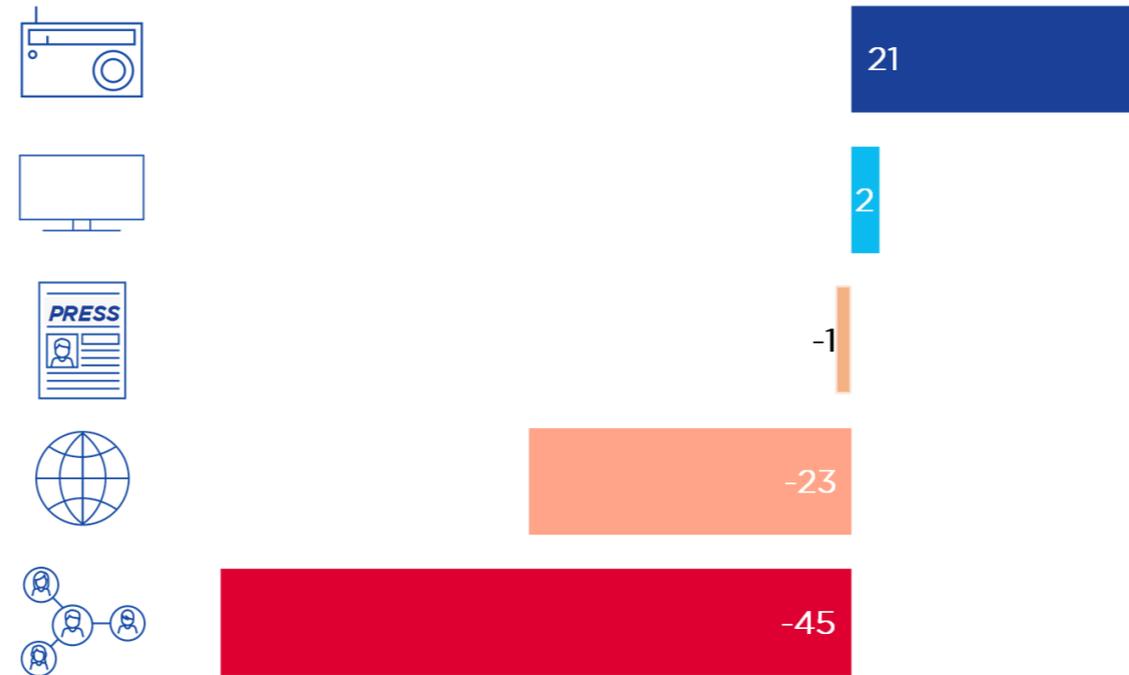
TRUST IN MEDIA IN THE EU

(% of population, 2019)



Note: Survey results at EU level represent a weighted average across the 28 EU Member States, applying official population figures provided by EUROSTAT.

2018 NET TRUST INDEX IN THE EU

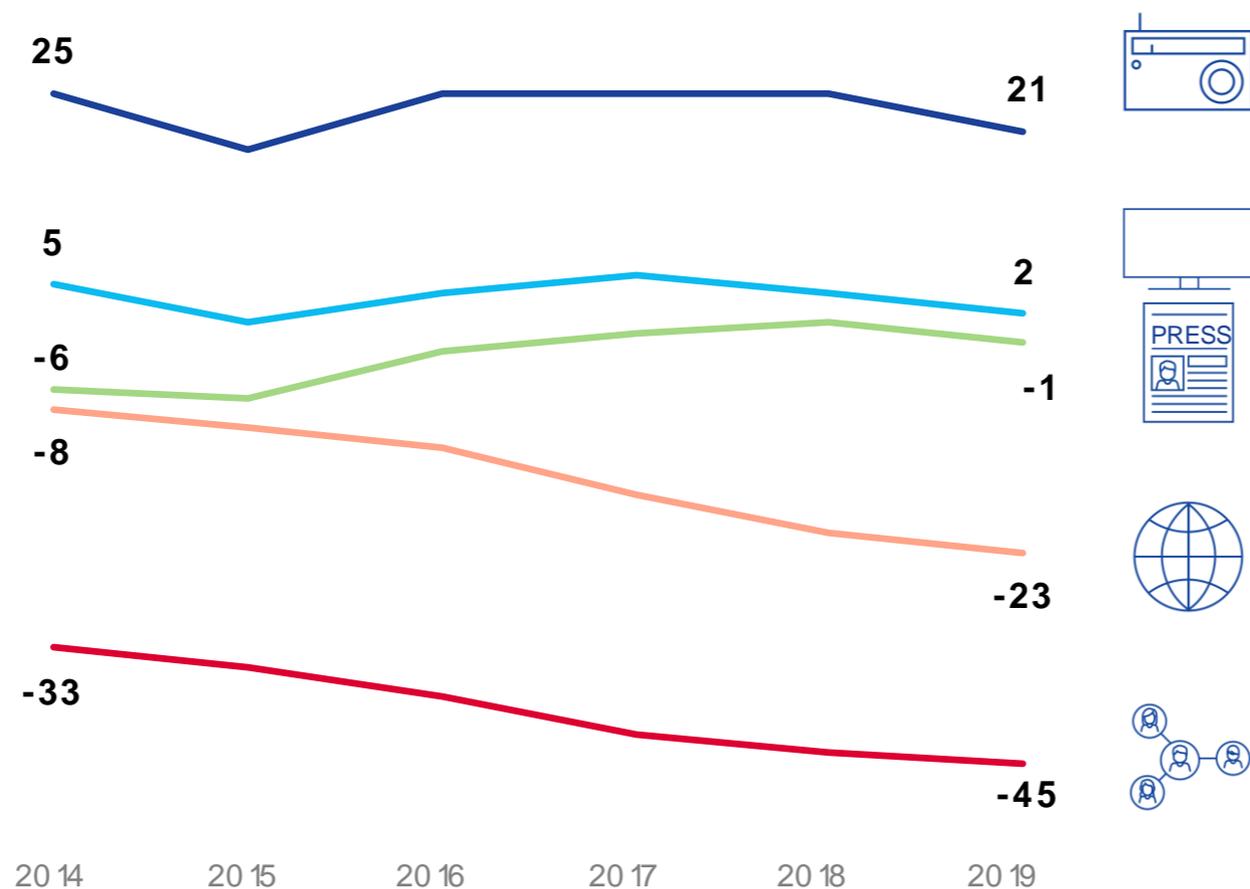


NET TRUST INDEX =
'% of people who tend to trust' - '% of people who tend not to trust'

AVERAGE NET TRUST IN THE MEDIA = -9

EVOLUTION OF THE NET TRUST INDEX IN THE EU

(2014-2019)

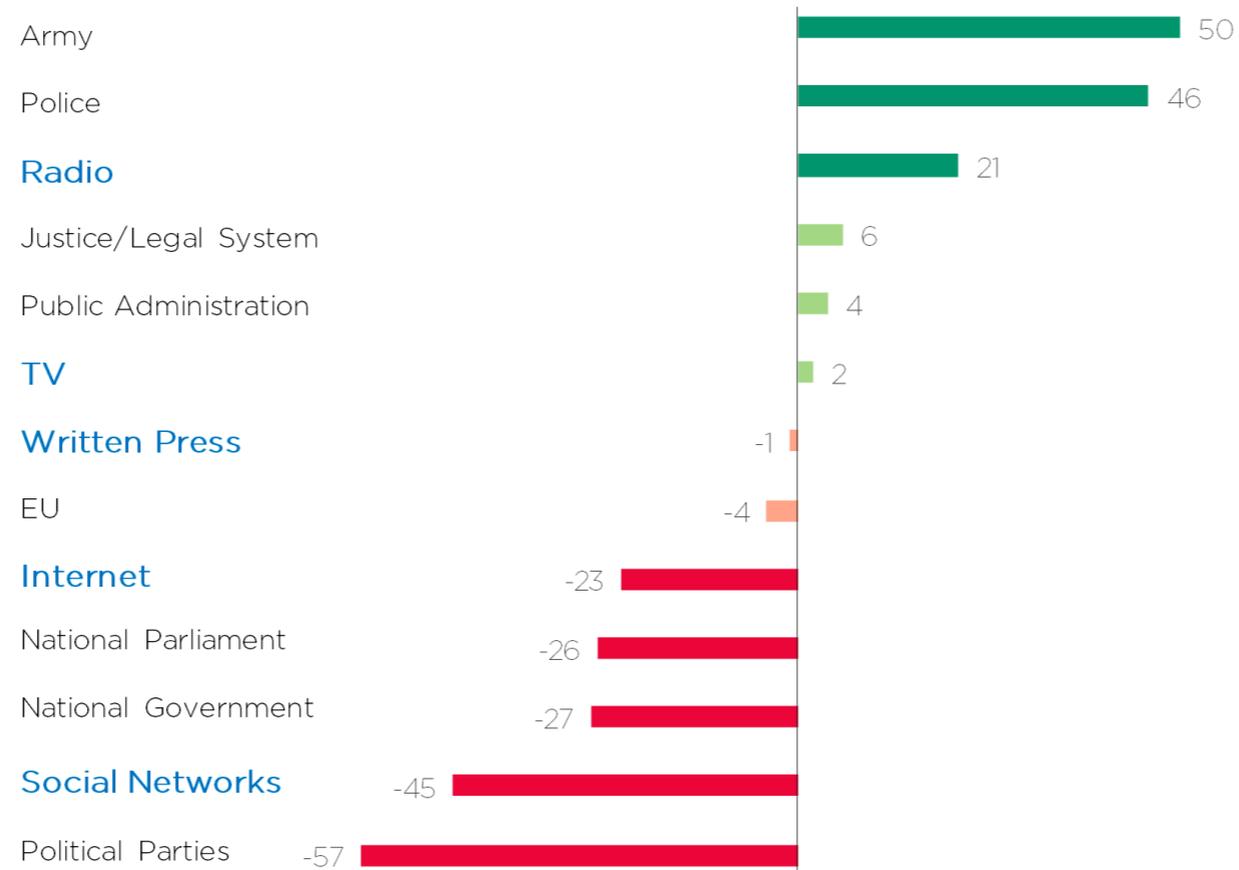


NET TRUST INDEX =

'% of people who tend to trust' – '% of people who tend not to trust'

TRUST IN MEDIA VS. TRUST IN OTHER INSTITUTIONS

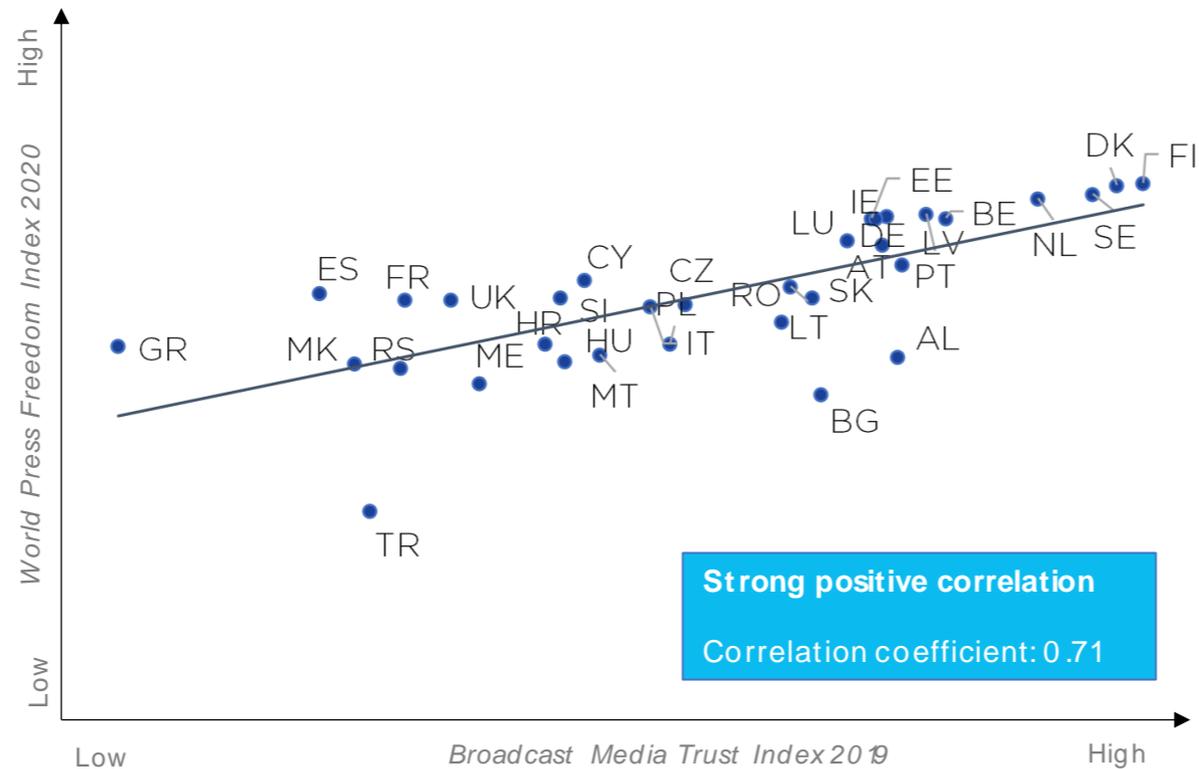
(EU Net Trust Index, 2019)



NET TRUST INDEX =
'% of people who tend to trust' - '% of people who tend not to trust'

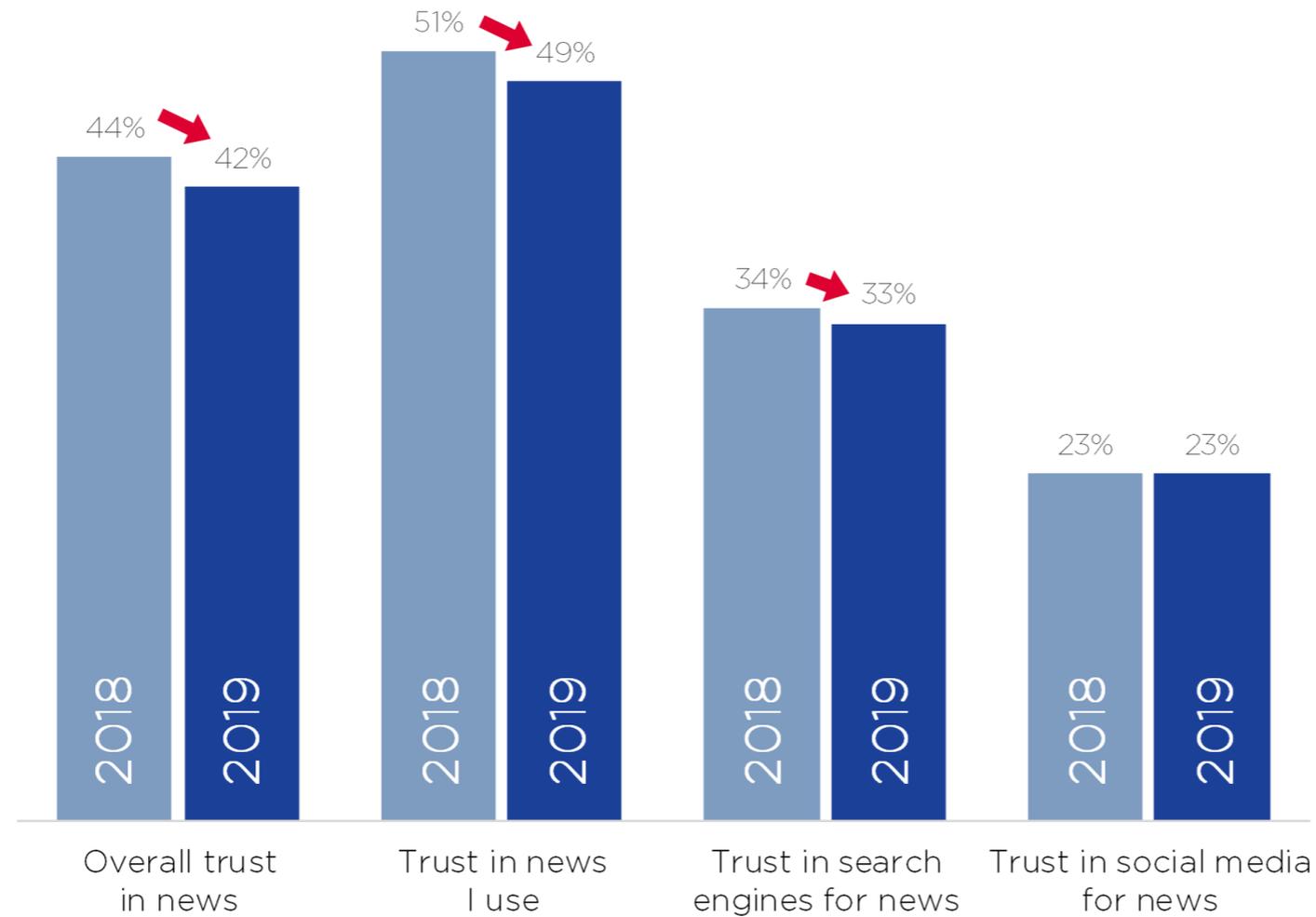
AVERAGE NET TRUST ACROSS THESE INSTITUTIONS = -4

PRESS FREEDOM VS. TRUST IN BROADCAST MEDIA

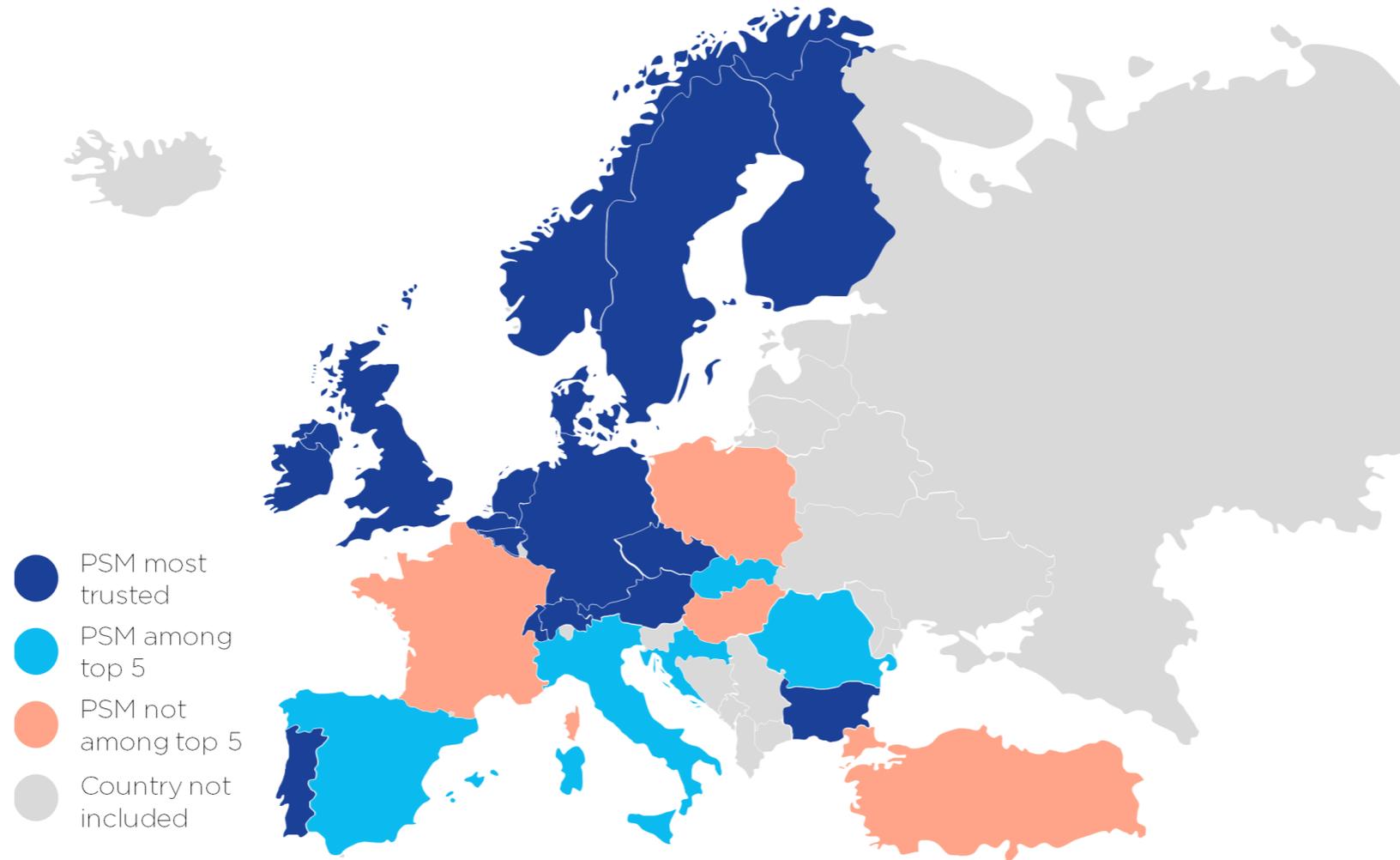


Note: The broadcast media net trust index used here represents the sum of the radio and TV net trust levels based on Eurobarometer data. The World Press Freedom Index ranges from 1-100: the higher the score, the less press freedom. For clarity's sake, the index was inverted to match higher scores to higher press freedom levels. The latest index was published in April 2020 and reflects events of the prior year (2019).

TRUST IN NEWS WORLDWIDE



MOST TRUSTED NEWS BRANDS

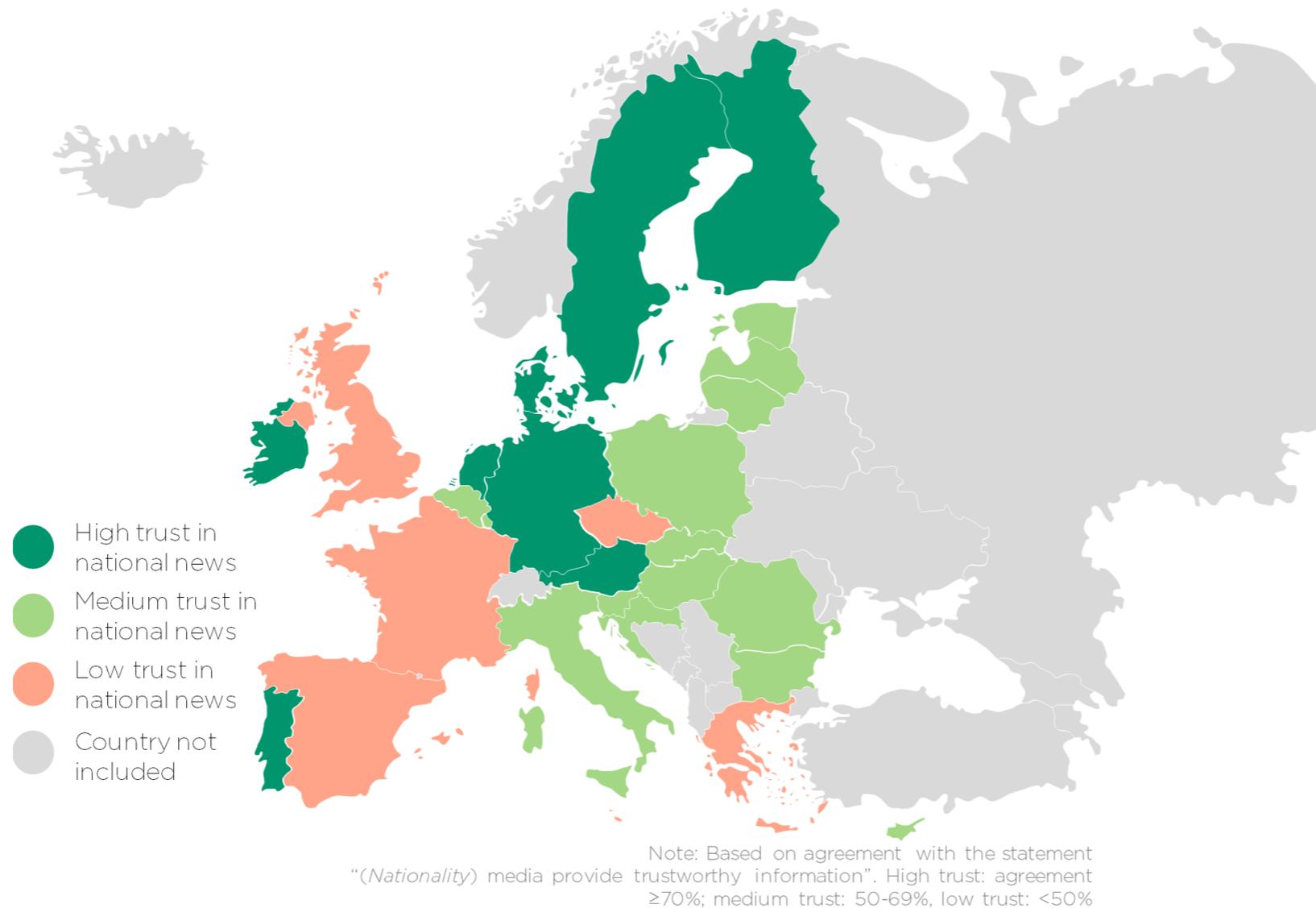


TRUST IN NEWS: RANKING OF MAIN PSM BRAND (2019)

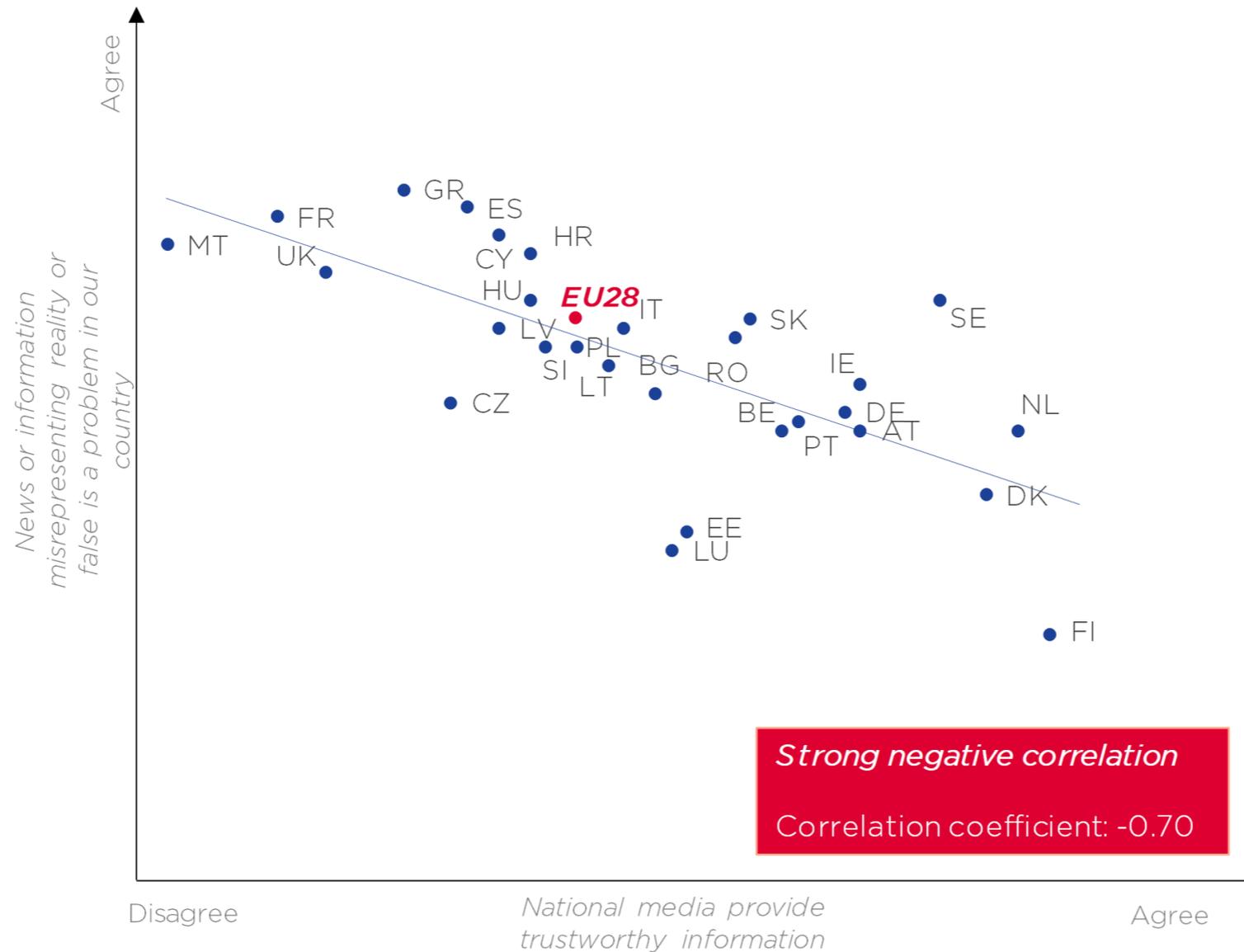
■ Leader (N° 1)
 ■ Challenger (N° 2-5)
 ■ N° ≥ 6

Country	PSM Brand	Rank	Country	PSM Brand	Rank
■ Austria	ORF News	1	■ Switzerland DE	SRF News	1
■ Belgium FL	VRT News	1	■ Switzerland FR	RTS News	1
■ Belgium FR	RTBF Info	1	■ UK	BBC News	1
■ Bulgaria	BNT	1	■ Slovakia	RTVS	2
■ Czech Republic	CRo	1	■ Croatia	HR News	4
■ Denmark	DR News	1	■ Italy	Rai News	4
■ Finland	Yle News	1	■ Spain	TVE	4
■ Germany	Tagesschau	1	■ Romania	TVR News	5
■ Ireland	RTÉ News	1	■ France	France TV News	7
■ Netherlands	NOS News	1	■ Poland	Polskie Radio	8
■ Norway	NRK News	1	■ Turkey	TRT News	10
■ Portugal	RTP News	1	■ Hungary	MTV	11
■ Sweden	SR	1	■ Greece	ERT	14

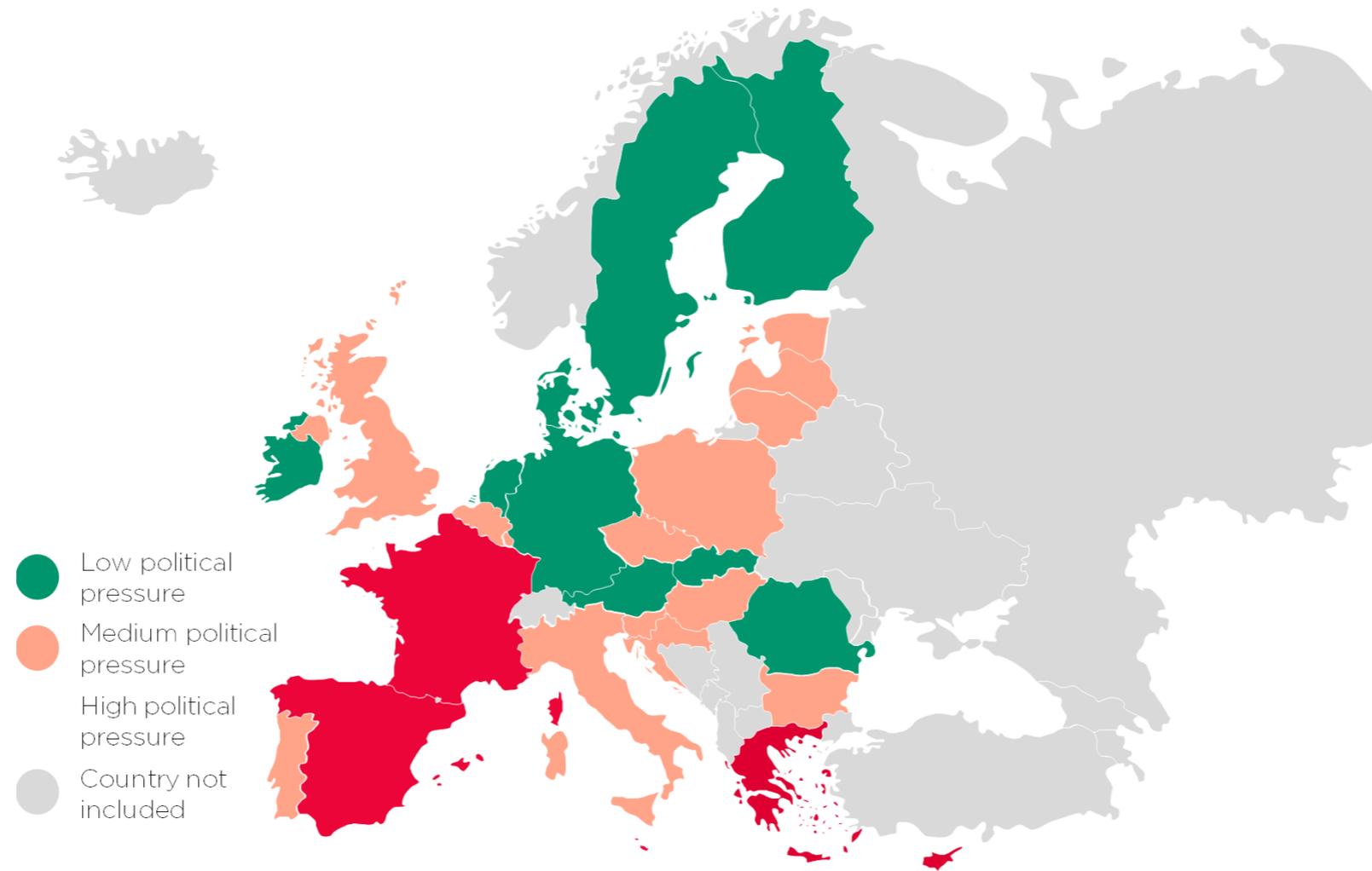
TRUST IN NATIONAL NEWS



TRUST IN NATIONAL NEWS vs. CONCERN ABOUT MISINFORMATION

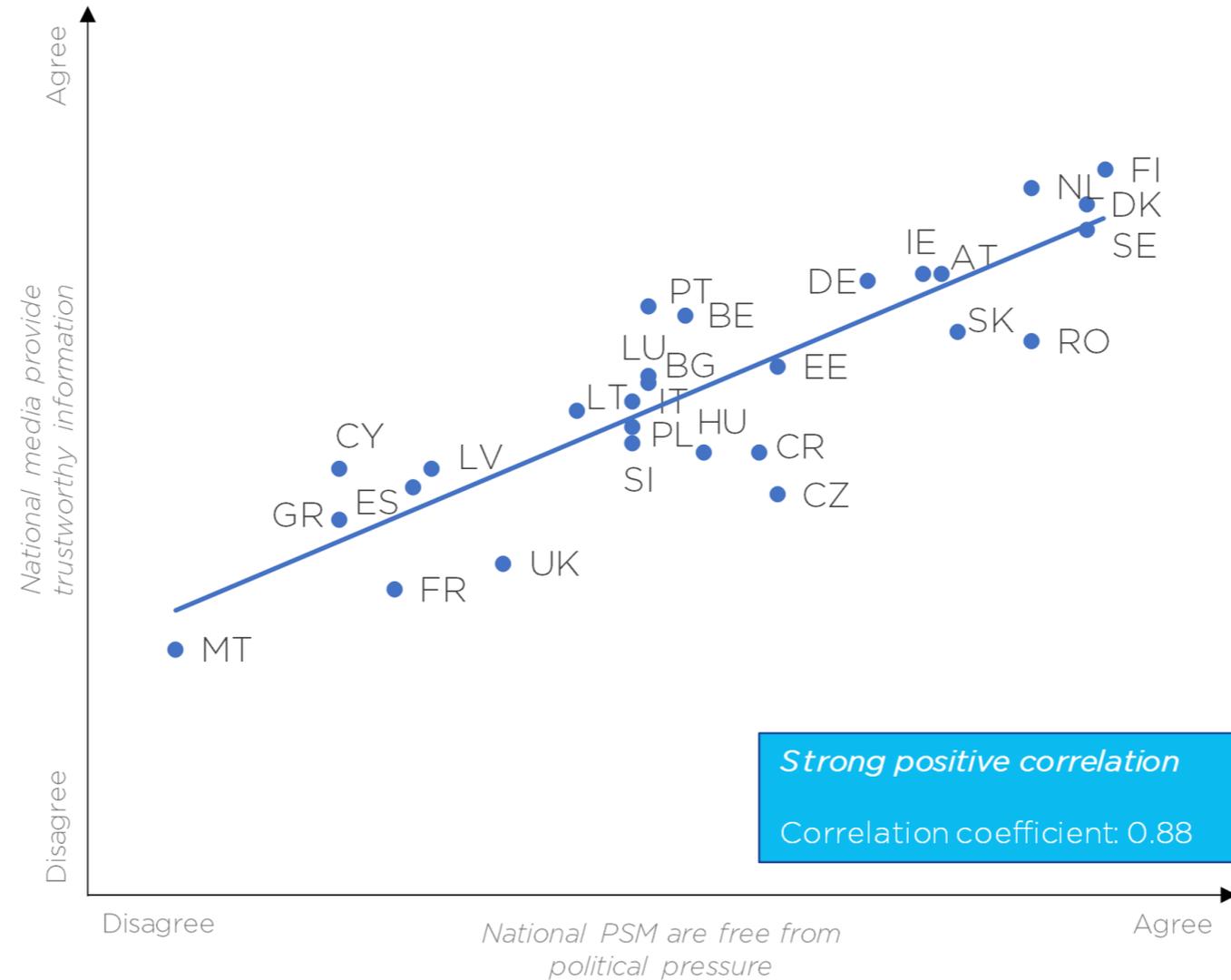


PERCEIVED POLITICAL PRESSURE ON PSM

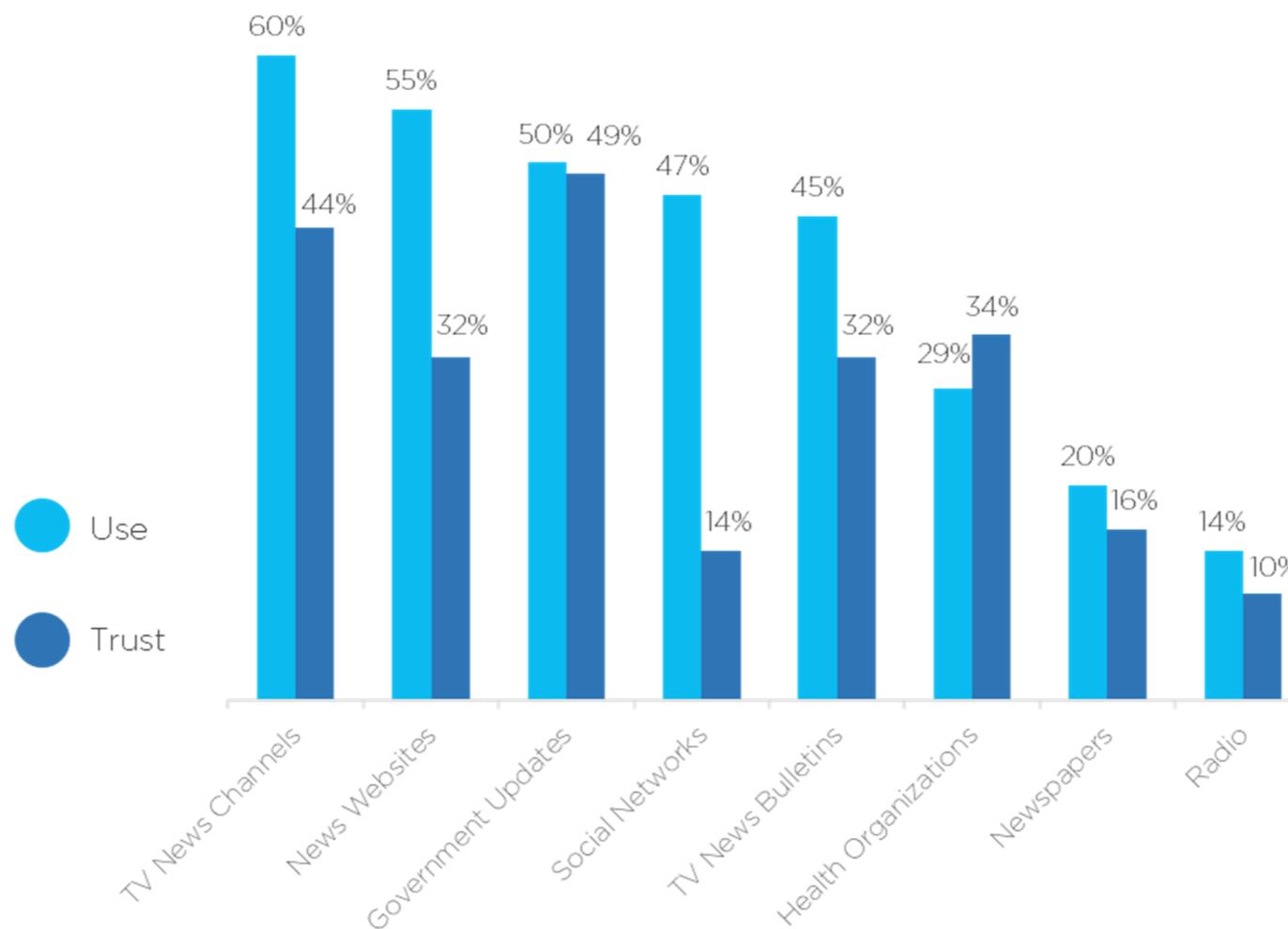


Note: Based on agreement with the statement “(Nationality) public service media are free from political pressure”. Low pressure: agreement $\geq 50\%$, medium pressure: 26-49%, high pressure: $\leq 25\%$

PERCEIVED POLITICAL PRESSURE ON PSM vs. TRUST IN NATIONAL NEWS



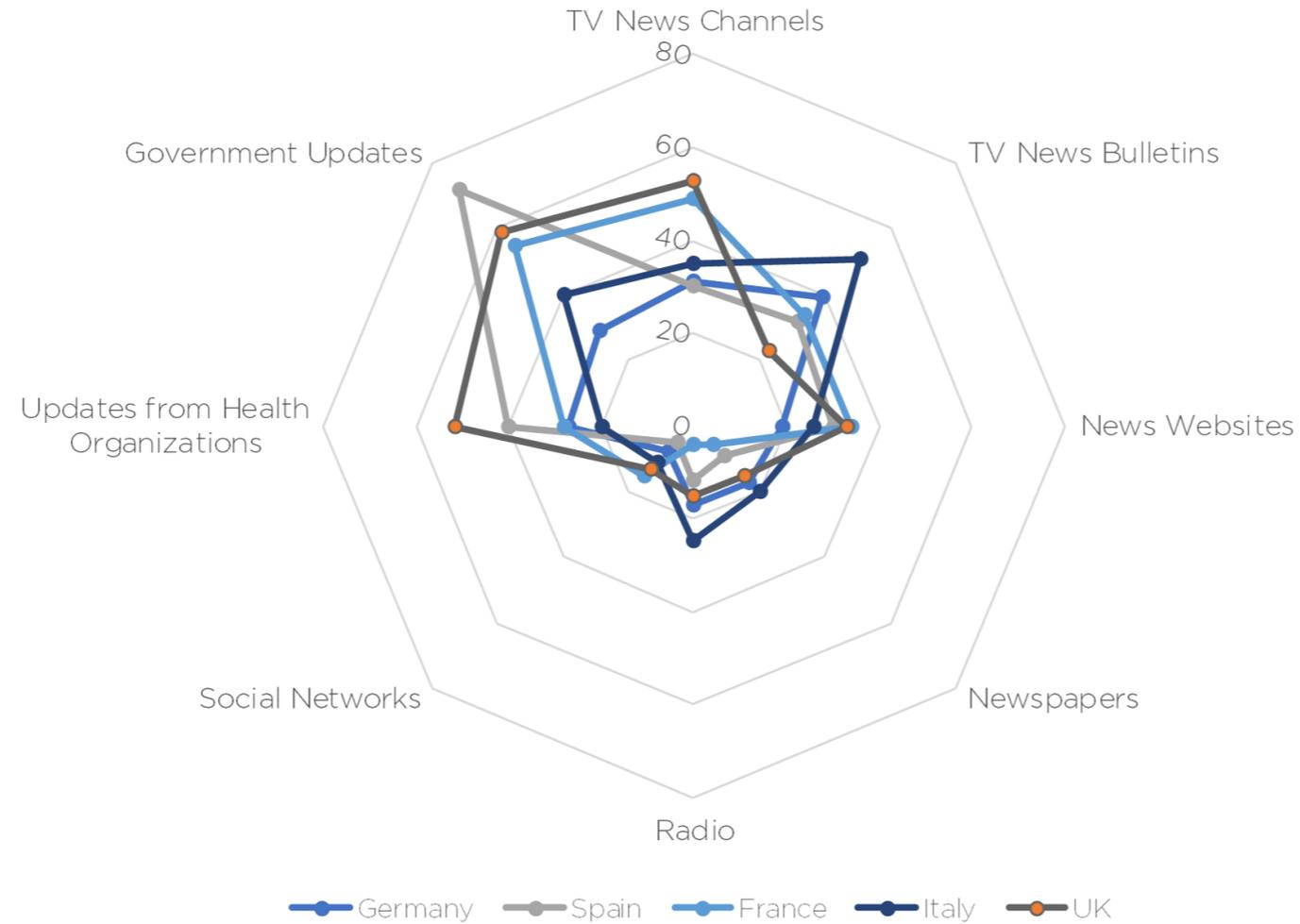
NEWS SOURCES WORLDWIDE: THE USE-TRUST-GAP



Based on the questions "Which sources are you using to keep up-to-date with news during the outbreak?" and "Which sources do you think are most trustworthy for news about coronavirus?" (multiple answers possible)

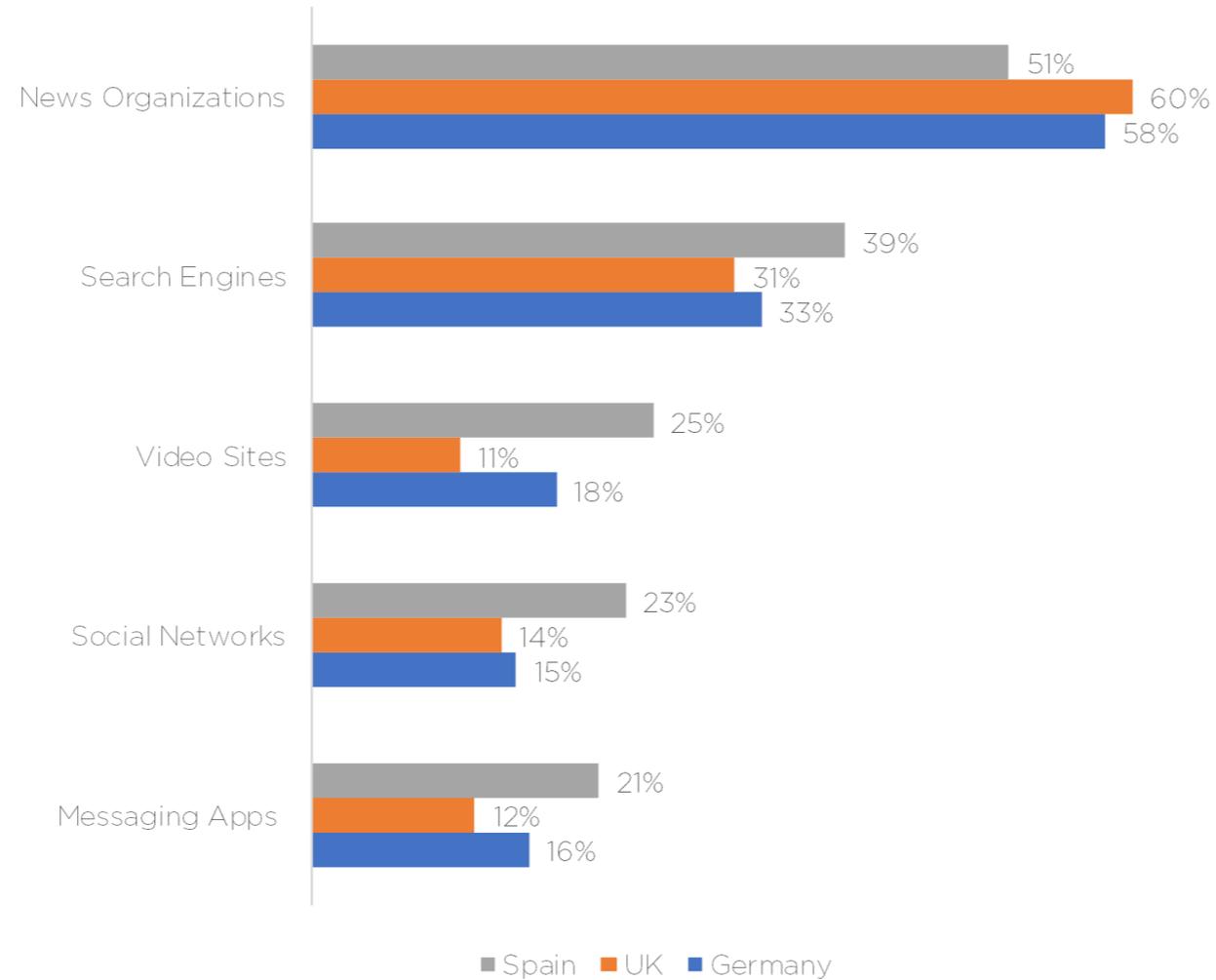
TRUSTED SOURCES DURING THE COVID-19 CRISIS

(European markets)



Each line = 20 percentage points. Based on the question "Which sources do you think are most trustworthy for news about coronavirus?" (multiple answers possible), % of respondents

COVID-19: TRUST IN NEWS ORGANIZATIONS VS. PLATFORMS



Note: Based on the question “How trustworthy would you say news and information about coronavirus (COVID-19) from the following is? “

TRUST IN PSM DURING THE CRISIS



The
Top 5 trusted
news sources during the crisis
in the Flemish-language market of
Belgium are VRT brands



The BBC is among the most trusted source
of crisis news in the UK:

86%

of listeners trust BBC radio coverage. 84% of
users put trust in BBC online coverage,
whereas 83% of viewers trust their TV
reporting



Of Irish adults 18+ who chose an RTÉ source
to keep up to date with COVID-19
developments,

70%

rated one or more sources from their PSM as
“very reliable and trustworthy”

TRUST IN PSM DURING THE CRISIS



88%

of Norwegians trust the COVID-19 coverage of NRK



86%

of German PSM TV news users rate the coverage of ARD and ZDF about the corona crisis as trustworthy – the highest attributed credibility of all media offers in the country



90%

of Czech Television news viewers consider the crisis coverage of their pubcaster as trustworthy

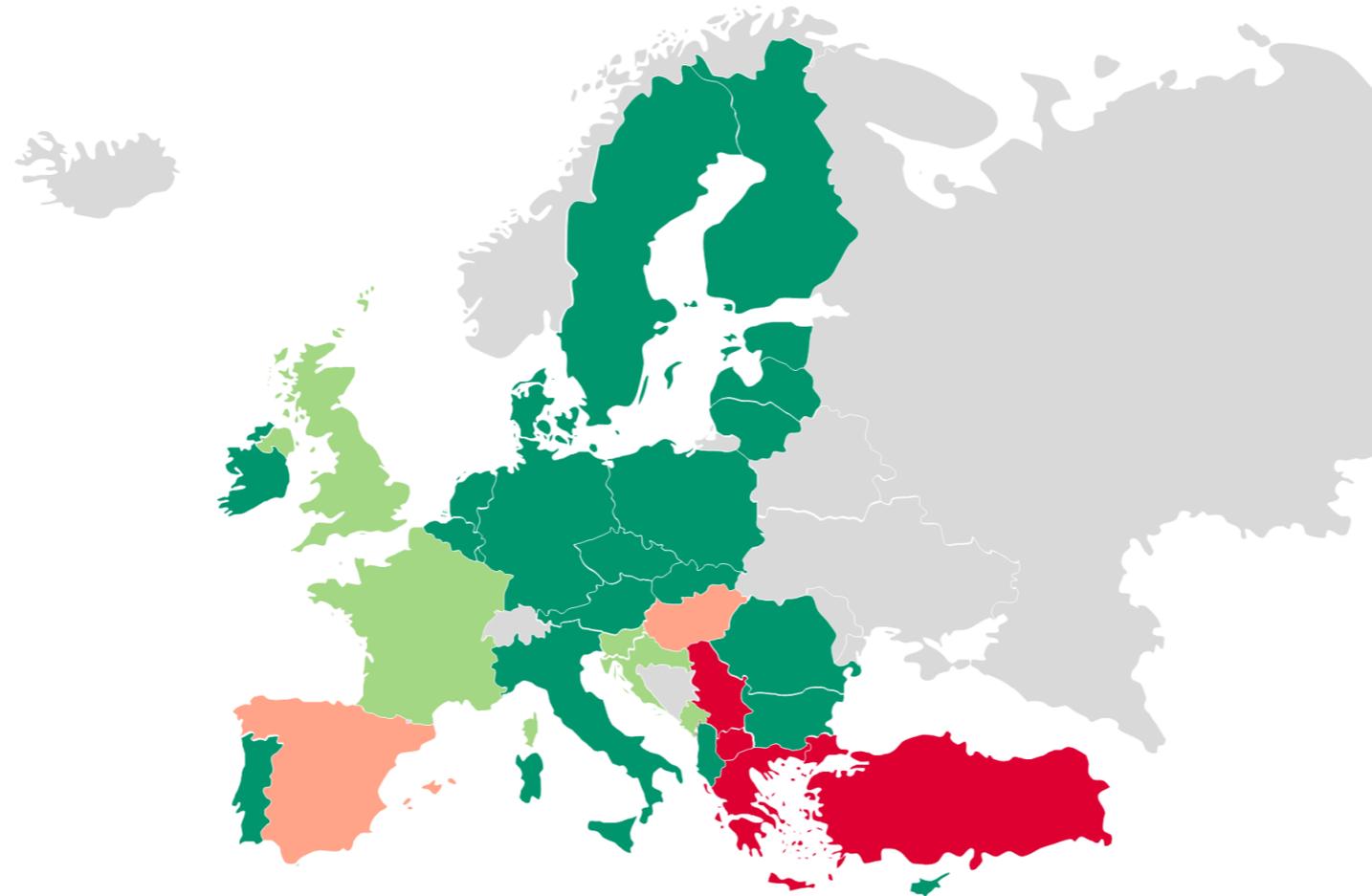


68%

of French people perceive information about the crisis obtained through PSM TV as trustworthy – the highest figure compared to any other news source

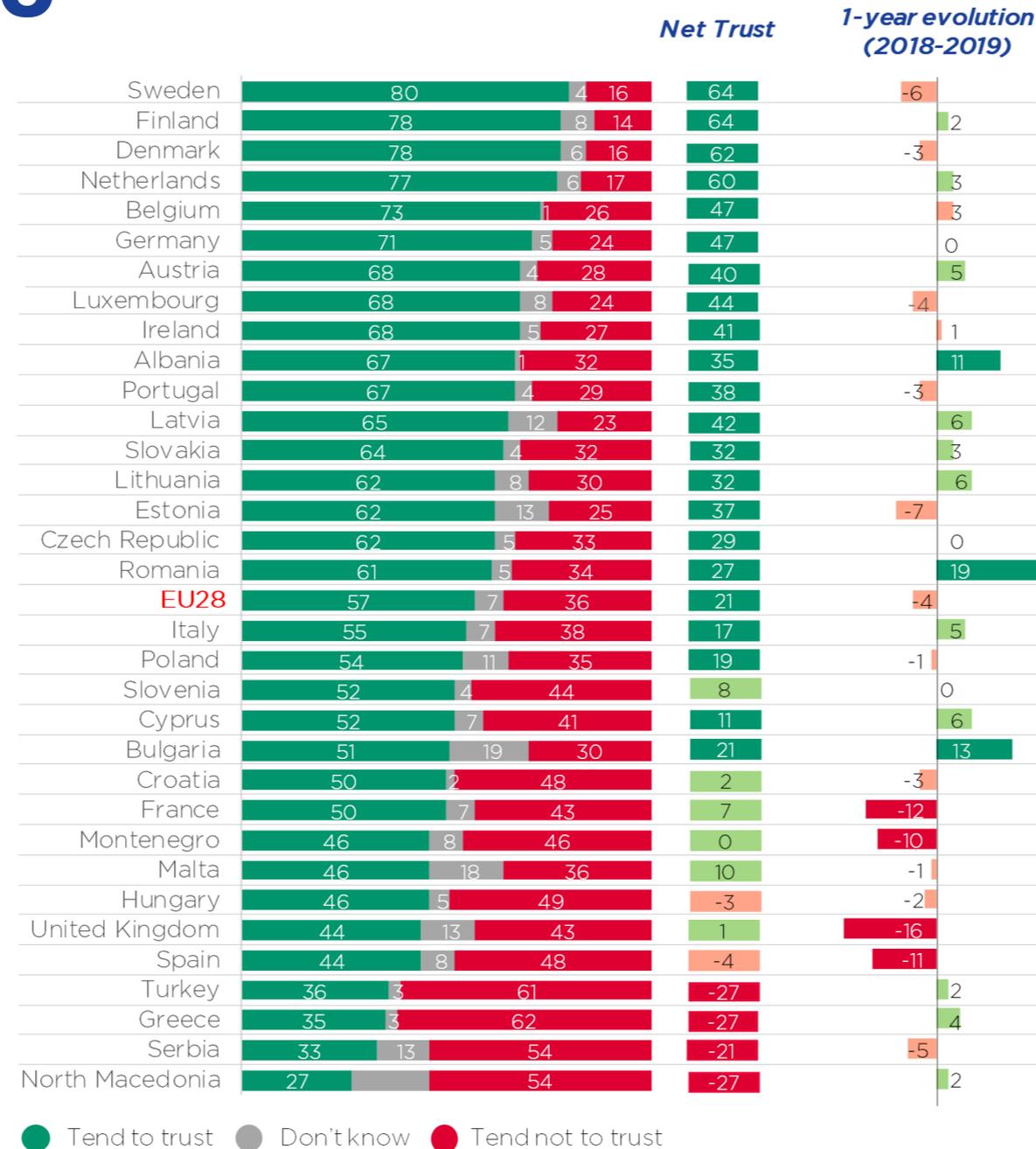
TRUST IN RADIO

(Net Trust Index 2019)



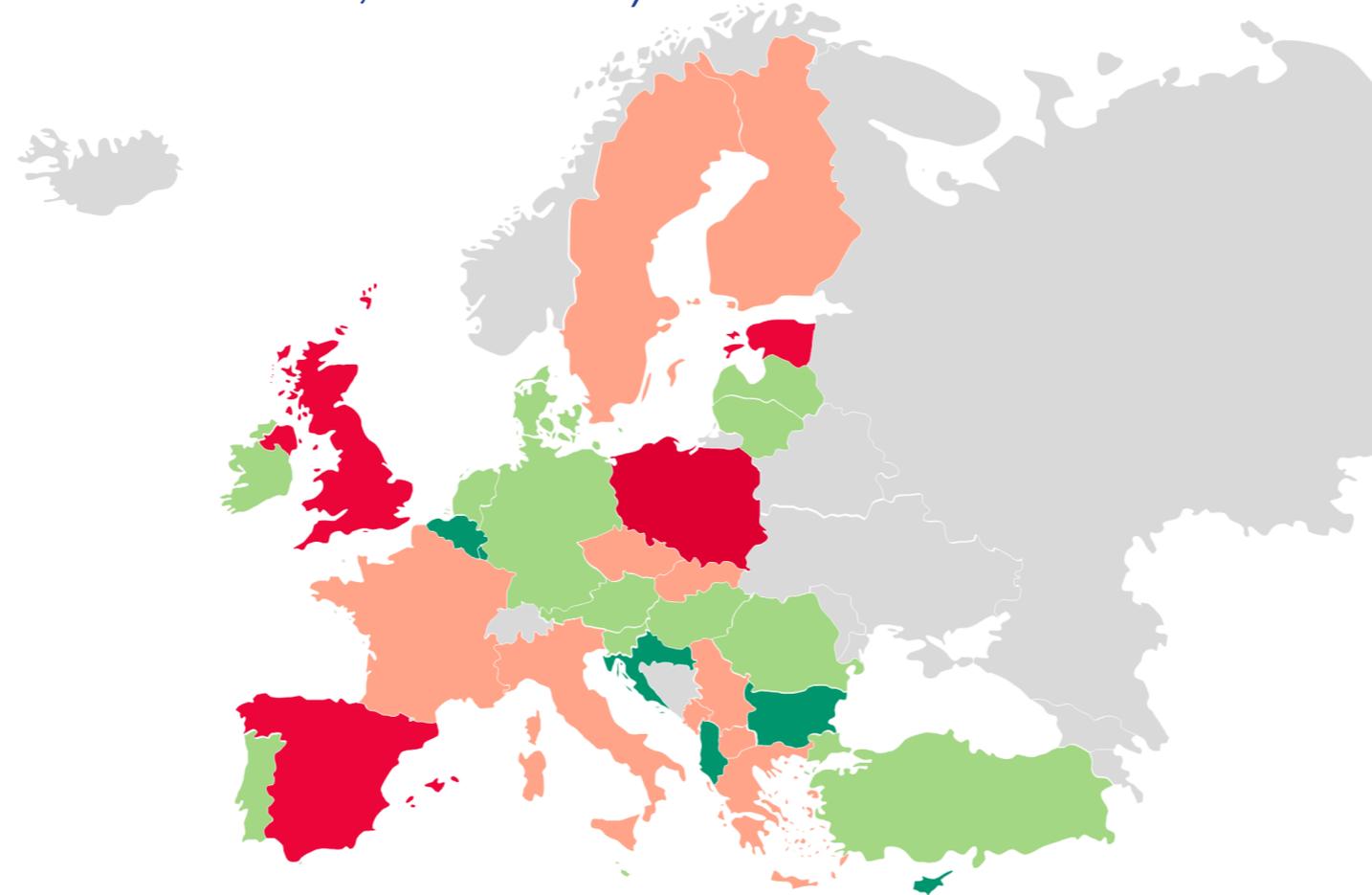
TRUST IN RADIO

(% of population 2019)



TRUST IN RADIO

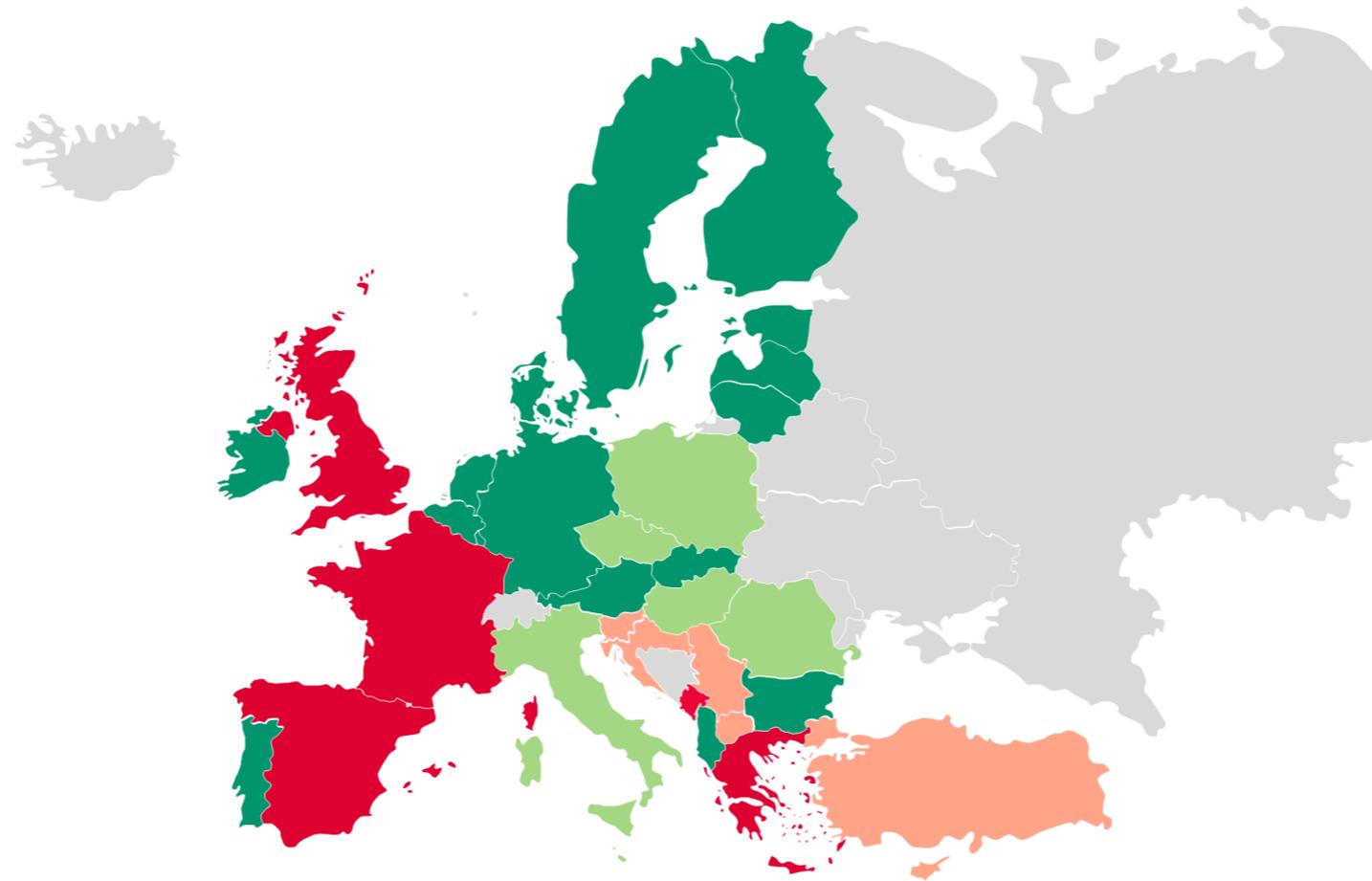
(5-year evolution of the Net Trust Index, 2014-2019)



- Significant increase (More than +10 points)
- Stable or limited increase (Between 0 and +10 points)
- Country not included
- Limited decrease (Between -1 and -10 points)
- Significant decrease (More than -10 points)

TRUST IN TV

(Net Trust Index 2019)

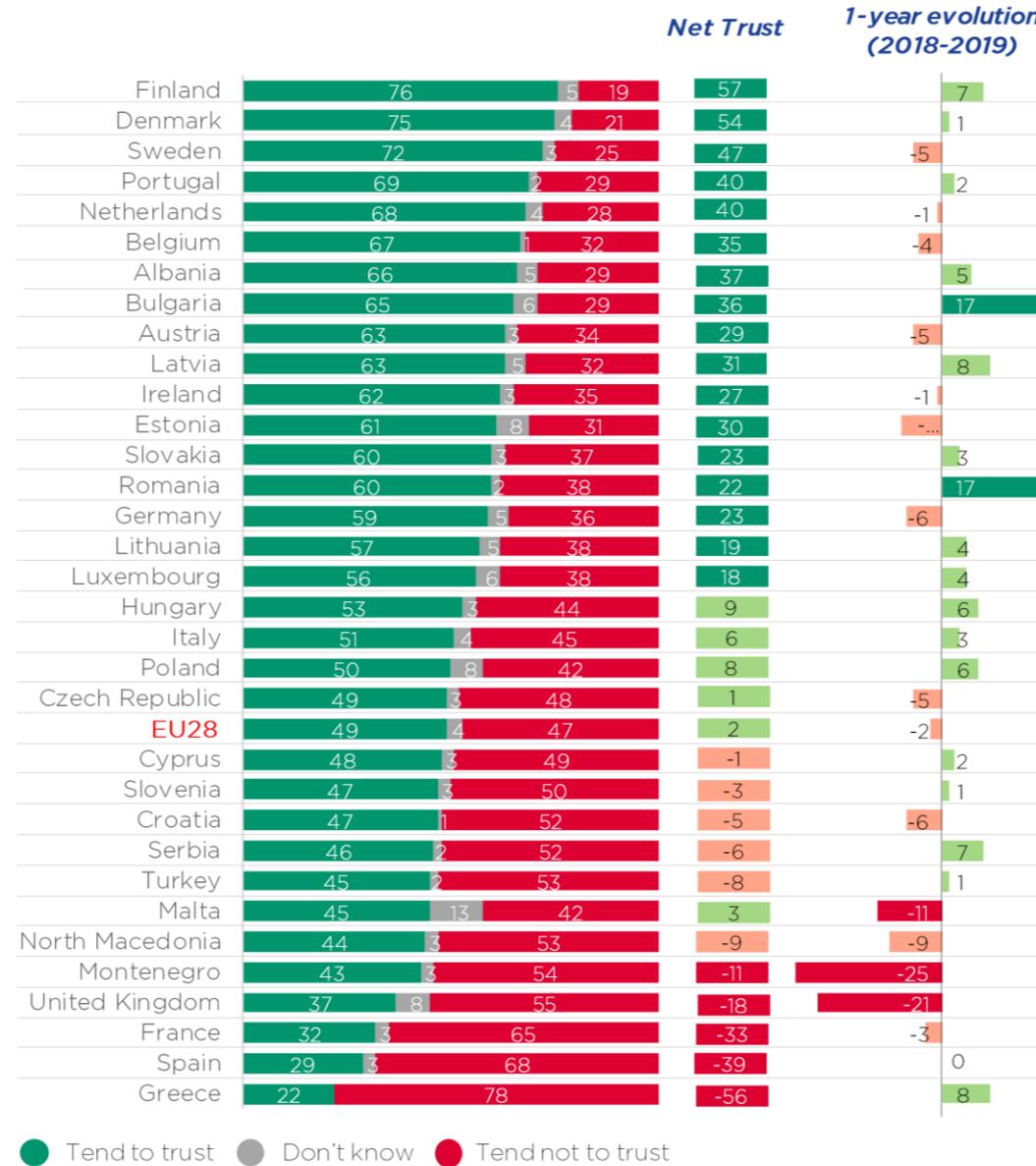


- High trust (Net Trust Index higher than 10)
- Medium trust (Net Trust Index between 0 and 10)
- Country not included
- Low trust (Net Trust Index between -1 and -10)
- No trust (Net Trust Index below -10)

NET TRUST INDEX =
'% of people who tend to trust' - '% of people who tend not to trust'

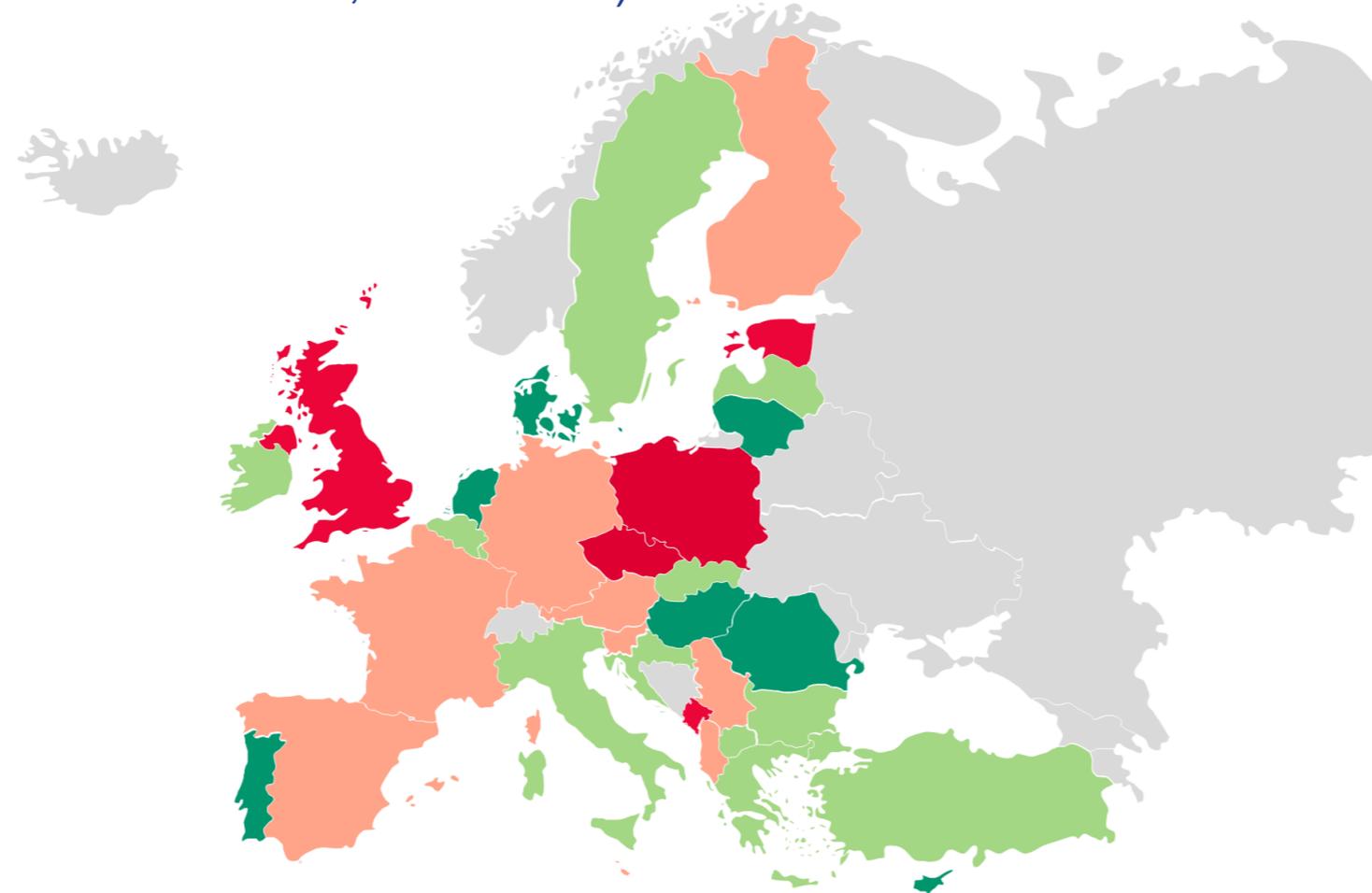
TRUST IN TV

(% of population 2019)



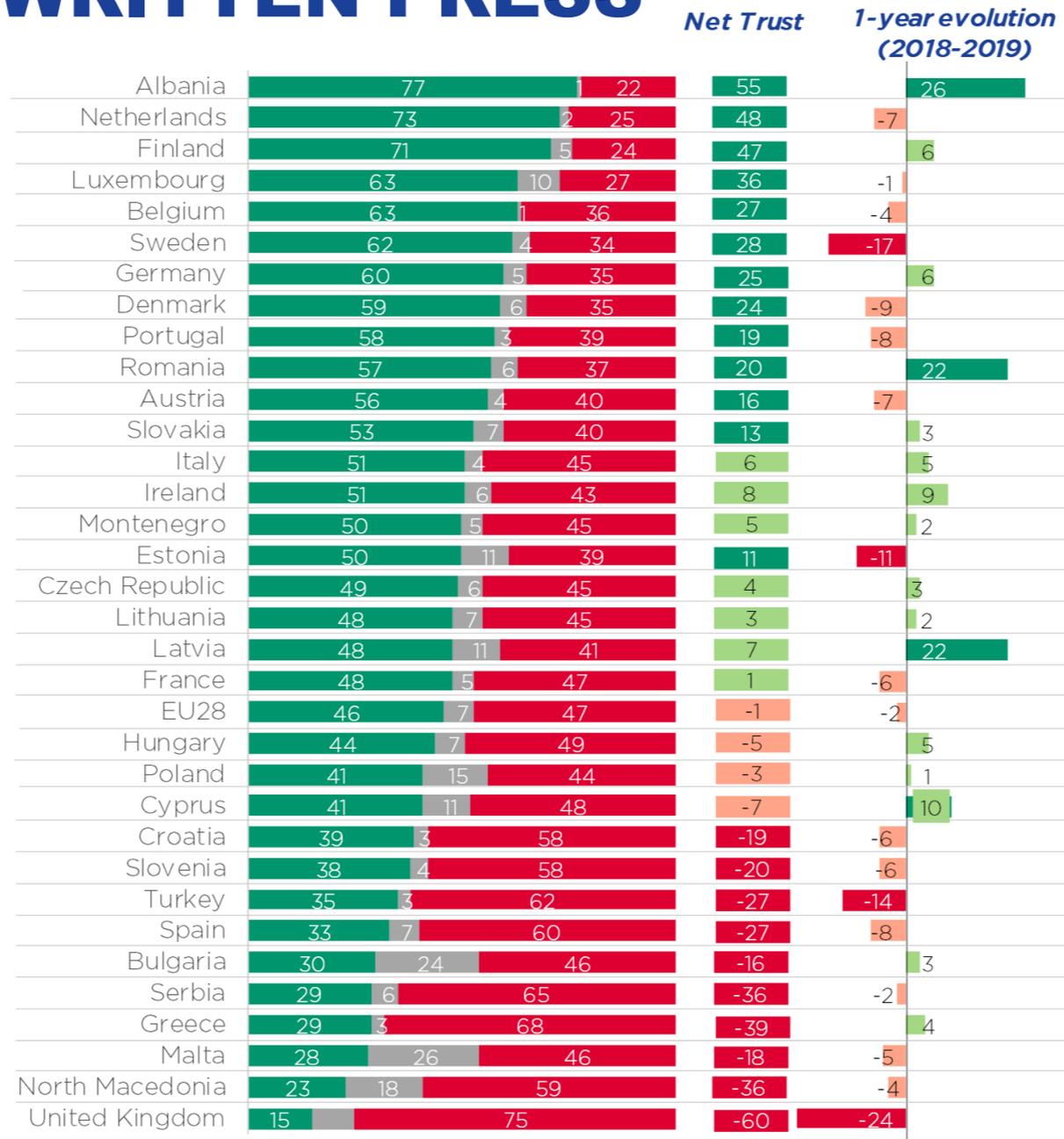
TRUST IN TV

(5-year evolution of the Net Trust Index, 2014-2019)



TRUST IN THE WRITTEN PRESS

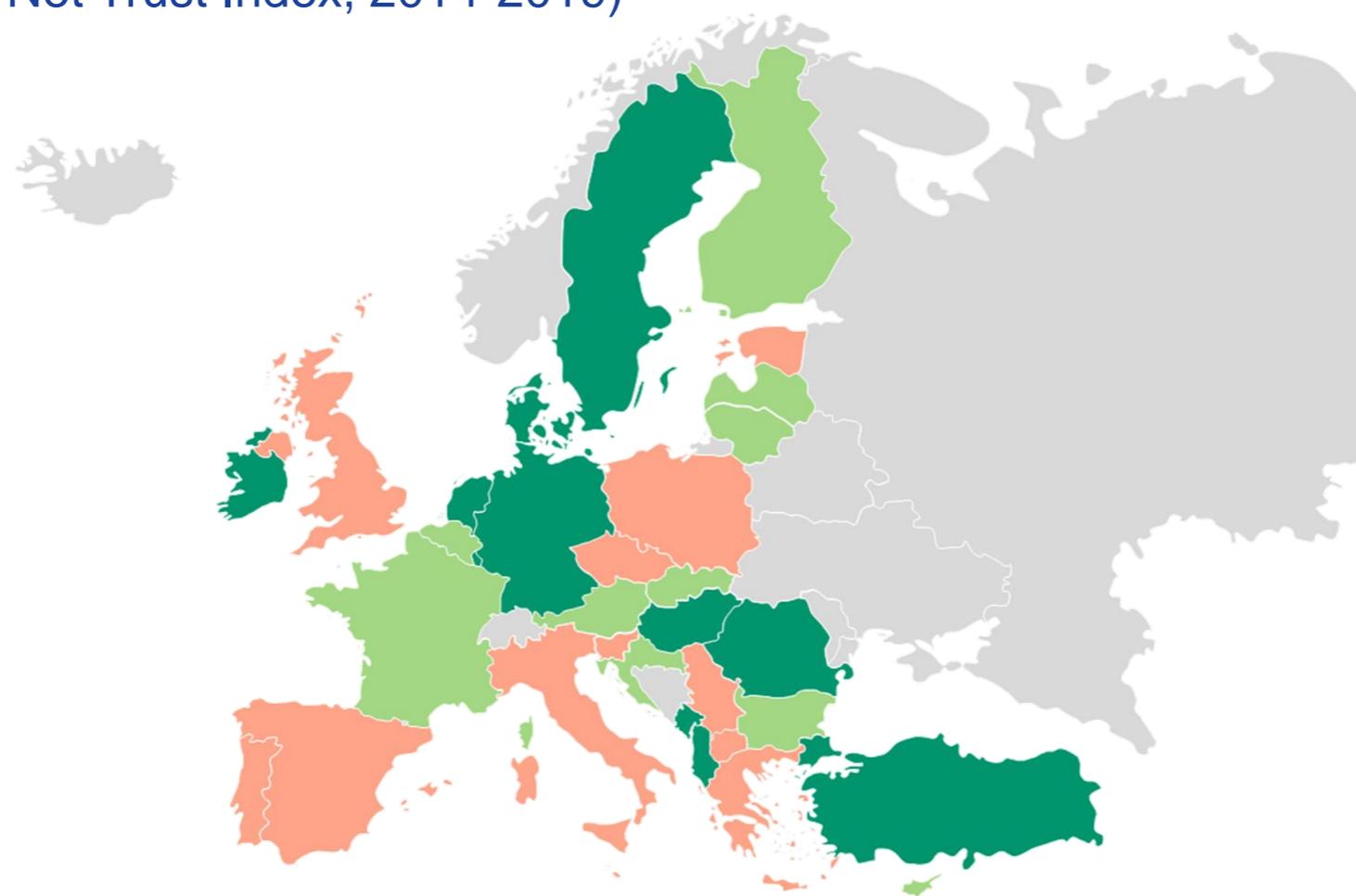
(% of population 2019)



● Tend to trust ● Don't know ● Tend not to trust

TRUST IN THE WRITTEN PRESS

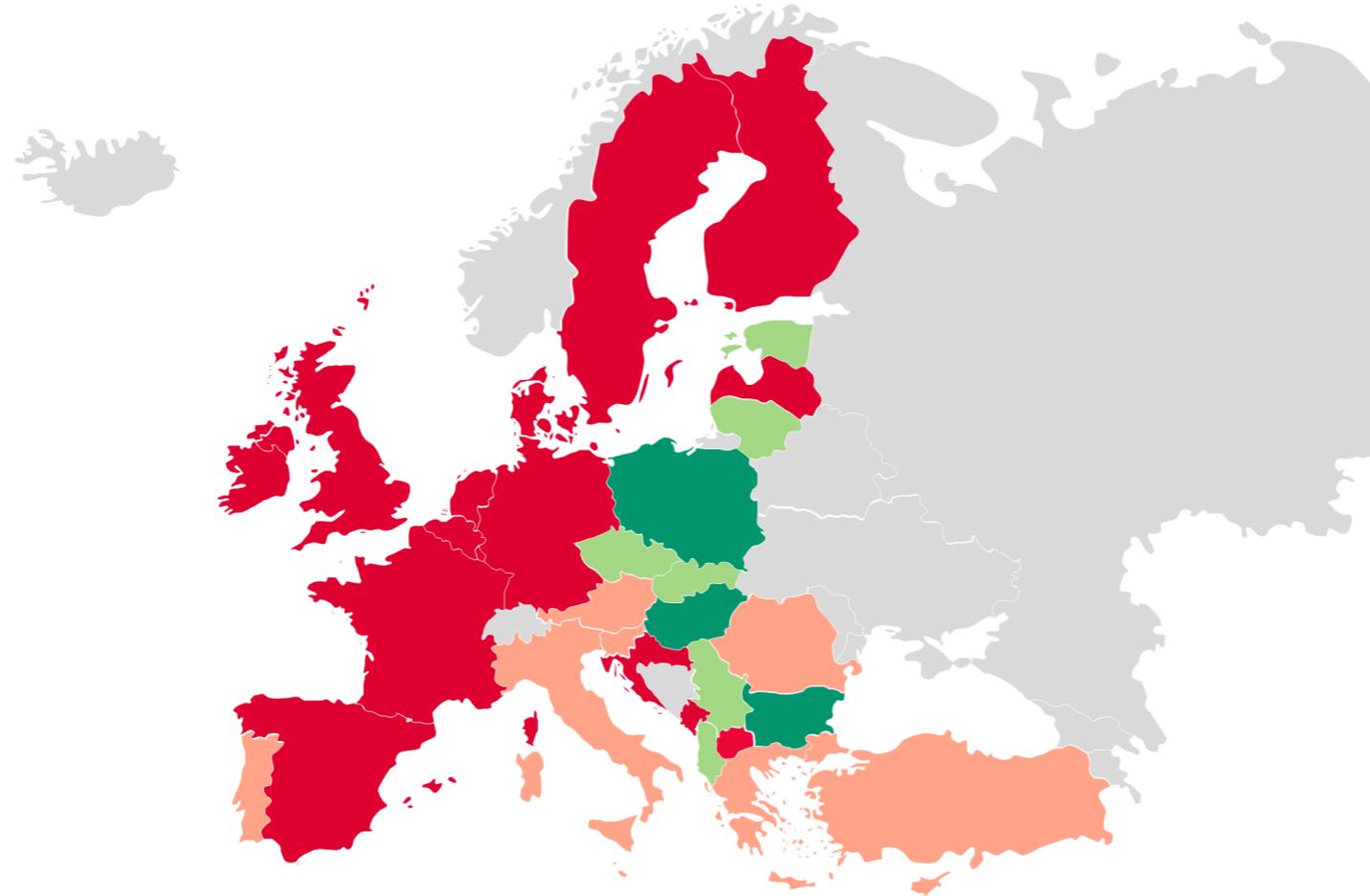
(5-year evolution of the Net Trust Index, 2014-2019)



- Significant increase (More than +10 points)
- Stable or limited increase (Between 0 and +10 points)
- Country not included
- Limited decrease (Between -1 and -10 points)
- Significant decrease (More than -10 points)

TRUST IN THE INTERNET

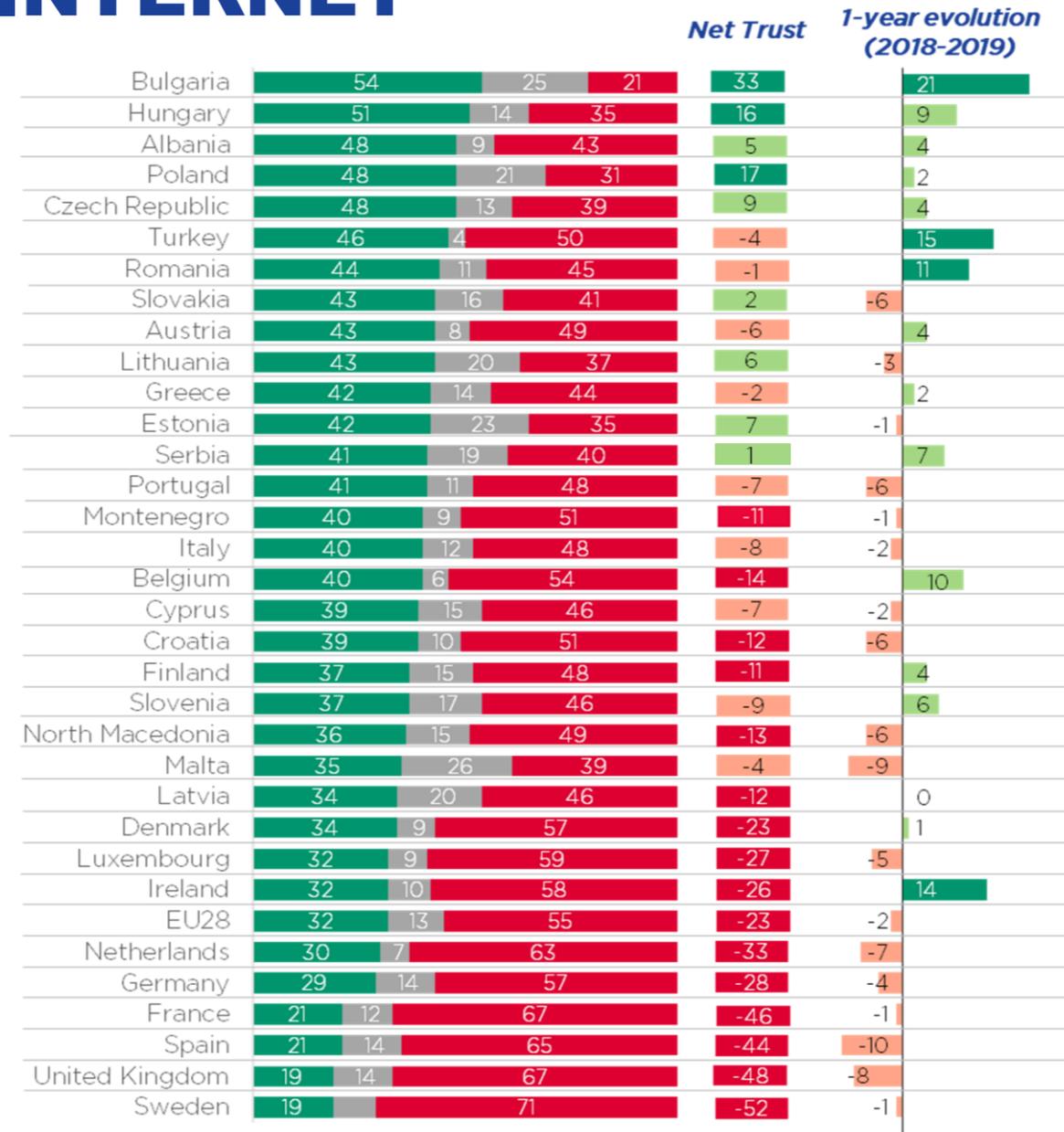
(Net Trust Index 2019)



NET TRUST INDEX =
'% of people who tend to trust' - '% of people who tend not to trust'

TRUST IN THE INTERNET

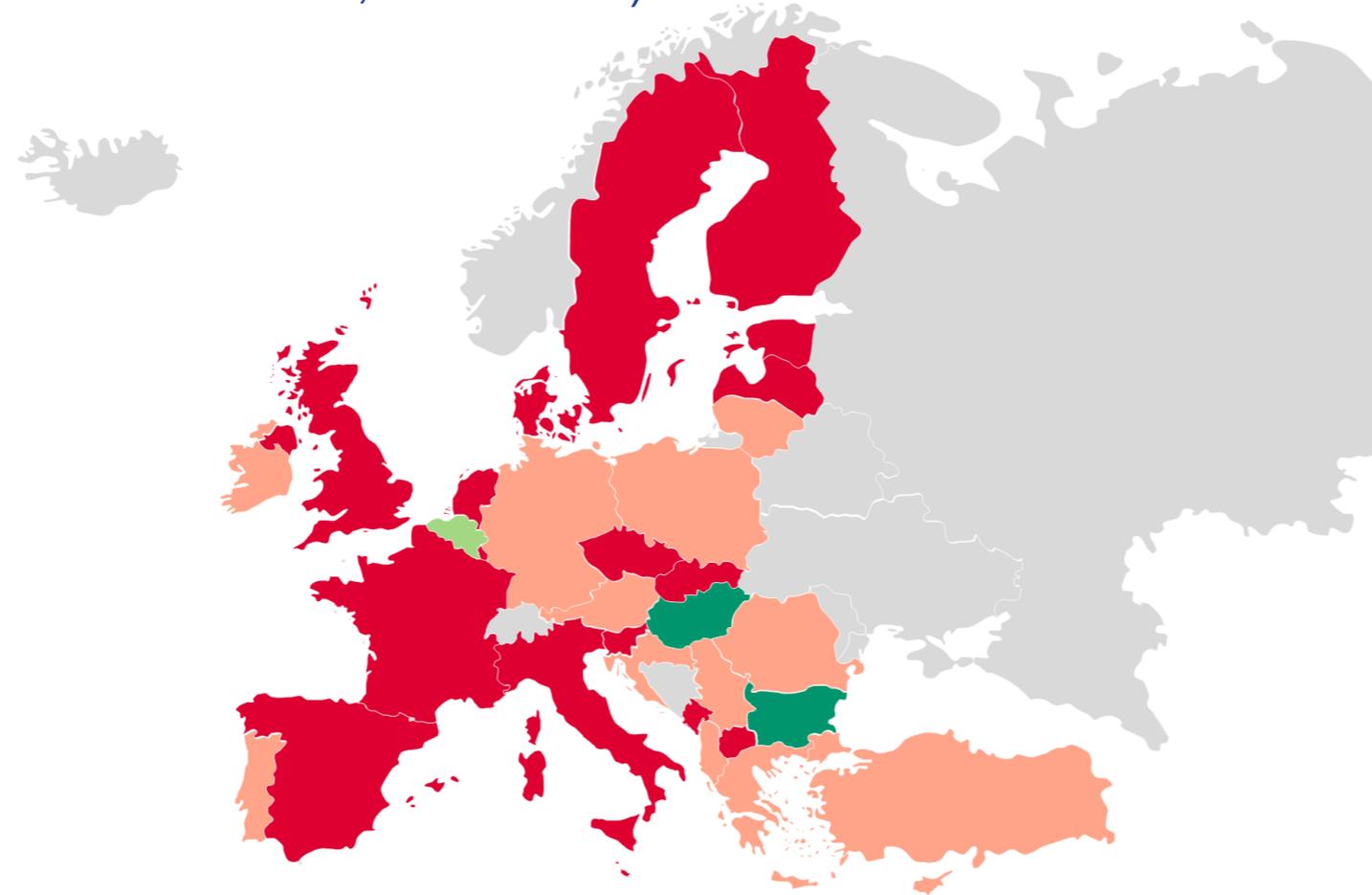
(% of population 2019)



● Tend to trust ● Don't know ● Tend not to trust

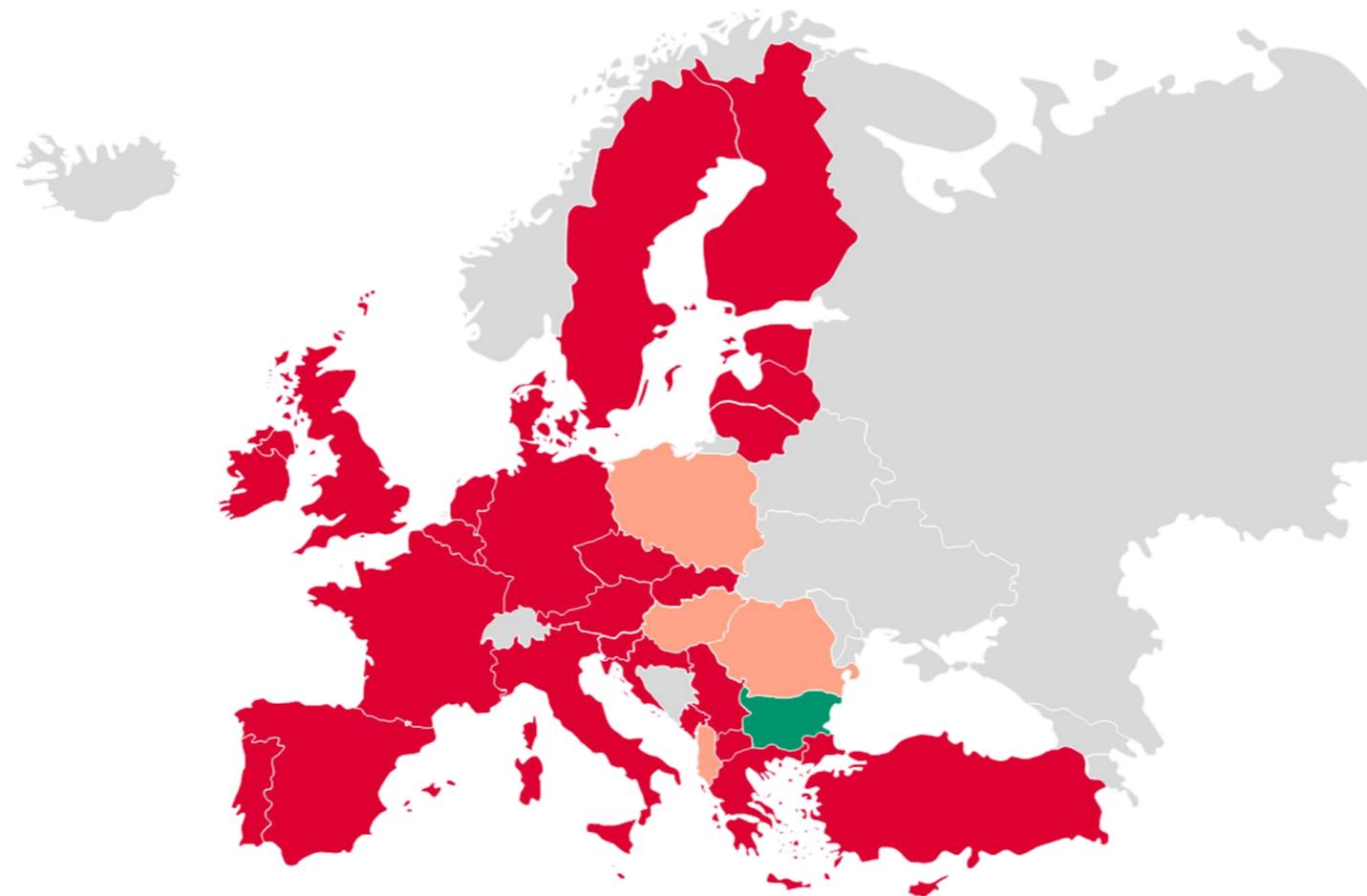
TRUST IN THE INTERNET

(5-year evolution of the Net Trust Index, 2014-2019)



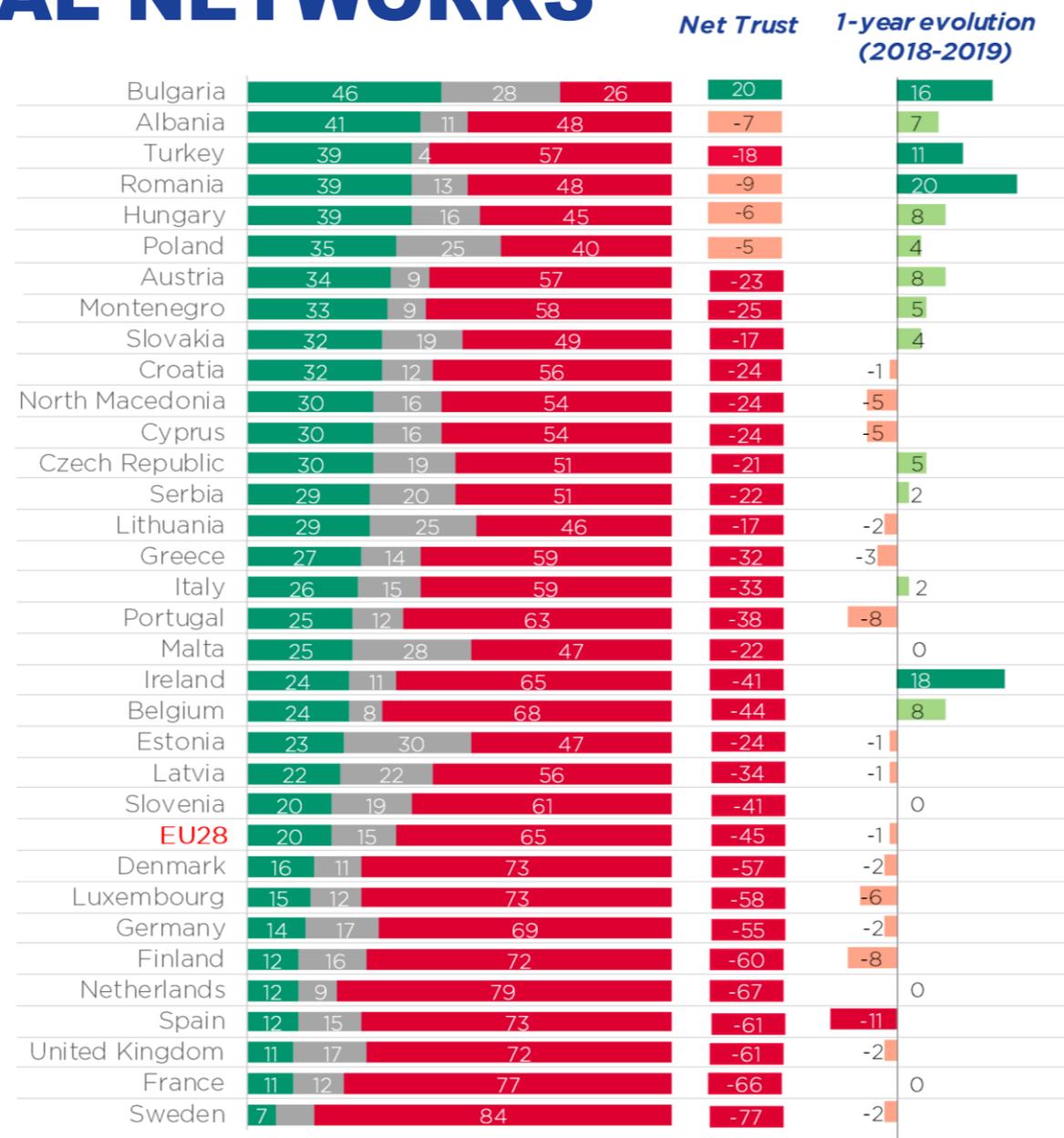
TRUST IN SOCIAL NETWORKS

(Net Trust Index 2019)



TRUST IN SOCIAL NETWORKS

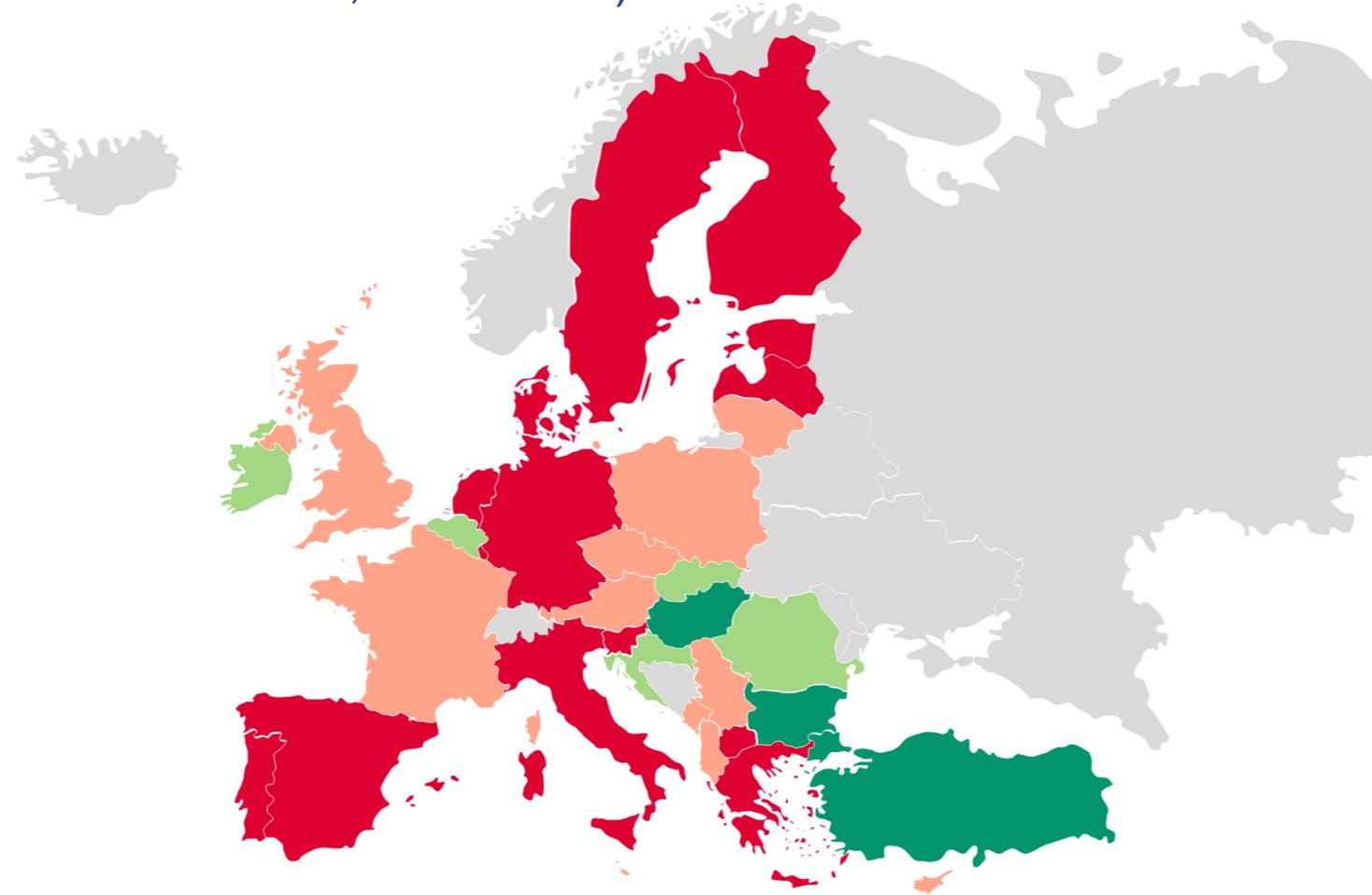
(% of population 2019)



● Tend to trust ● Don't know ● Tend not to trust

TRUST IN SOCIAL NETWORKS

(5-year evolution of the Net Trust Index, 2014-2019)



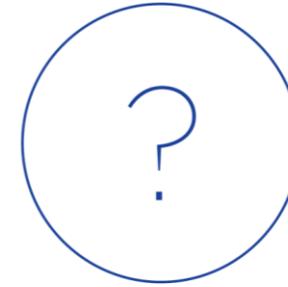
ASKING THE RIGHT QUESTION

“Please indicate your level of agreement with the following statements: I think you can trust most news/most news I consume/news in social media/news in search engines most of the time.”

Reuters Digital News Report

“For each of the following media and institutions, please tell me if you tend to trust it or tend not to trust it.”

Eurobarometer



“To what extent, if at all, do you trust each of the following to be a reliable source of news and information? And how much, if at all, would you say your level of trust in each of the following has changed over the past five years?”

Ipsos Global Advisor

“How trustworthy do you think news from the following brands is? Please use the scale below, where 0 is ‘not at all trustworthy’ and 10 is ‘completely trustworthy’.”

Reuters Digital News Report

“In general, how much trust do you have in the coverage of the news media of the following?”

Förtroendebaren (Swedish Trust Barometer)

“Below is a list of institutions/groups of people. For each one, please indicate how much you trust that institution/groups of people to do what is right.”

Edelman Trust Barometer

WHO TRUSTS?

“And we must also make use of markets and social insurance in order to ensure that the economy performs well for everyone and protects most people from being exposed to dangerous, trust-destroying economic and social risks. This is probably why the liberal-democratic, capitalist welfare-states, such as the Nordic countries, have the highest levels of social and political trust. There is a positive feedback loop between these institutional structures and social and political trust generally.”

Knight Foundation (2018): Social and Political Trust: Concepts, Causes and Consequences

“It’s not that trust has been broken, it’s that we are deeply divided on trust: the fortunate few have far higher levels of trust in the system than the many. And the gap is getting wider. (...) While trust in institutions among the informed public (...) has been rising and is now at an all-time high, trust in those same institutions among the mass population has flatlined. The result? The trust gap between the elites and the people has nearly tripled in size.”

Edelman (2020): 20 Years of Trust



“Those with a higher level of education are more likely to trust media across all channels.”

Ipsos (2019): In Media We Trust? How our views of the media are changing

“Our findings around trust are more complex, as public service media are often among the most trusted sources of news, but also in many cases are less trusted by people on the political right and people with populist attitudes.”

Reuters Institute (2019): Old, Educated, and Politically Diverse: The Audience of Public Service News

A CRISIS OF TRUST?

“Our findings suggest not so much a crisis of trust as a crisis of media. (...) Where there is a decline in trust, perceived or actual, we should view this as an opportunity for media conglomerates to renegotiate their own relationships with their audiences.”

Ipsos (2019): In Media We Trust? How our views of the media are changing

“It’s a moment of great opportunity. A time for us to redouble our commitment to trust in media and stand up for integrity in news like never before.”

Tony Hall (2020): Trust in the age of disruption. Speech at the Global Business Summit

“In other words, people with low trust in the news media don’t want it to be fundamentally different – they just want it to be better.”

Richard Fletcher (2020): Trust will get worse before it gets better

“We want people to be general political trusters and specific political distrusters.”

Kevin Vallier (2018): Is Trust possible in a Polarized Age?

“Low levels of trust seem to be a chronic issue, rather than a very new acute one.”

Ipsos (2019): Trust – the Truth?



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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