

The background of the entire page is a close-up, artistic photograph of several incandescent light bulbs. The bulbs are arranged in a way that creates a sense of depth and focus, with some bulbs in sharp focus and others blurred. The lighting is dramatic, with strong highlights and deep shadows, giving the image a high-tech or intellectual feel. The overall color palette is dominated by blues and greys, with the warm tones of the light bulbs providing a contrast.

EBU

OPERATING EUROVISION AND EURORADIO

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TRUST IN MEDIA 2016

MEDIA INTELLIGENCE SERVICE
MARCH 2016

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ABOUT THIS PROJECT

In the age of media abundance, trust is an important factor in the relationship between any kind of media and their audience. Measuring trust enables media organizations to track citizens' perception of the organization and its output. This is essential for audience building, and a useful element of shaping Members' strategic planning.

What is trust?

- Trust is an individual's perception of the reliability of other individuals and institutions
- Trust is the result of socio-economic conditions and education, specific events and long-standing perceptions
- Media organizations can work to increase trust on a mid- and long-term basis 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 aspects
- In organizations with substantial societal relevance, such as PSM, trust is also related to social responsibility

How is it measured?

There are several annual studies that measure the level of trust in media, such as the Edelman Trust Barometer or the World Values Survey. For this report the results of the Eurobarometer were used, which is:

- Public opinion survey by the European Commission, currently conducted by TNS
- Provides public opinion analysis on a variety of topics, e.g. the image of the European Union, the economic situation, or the main concerns of citizens
- 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 per country, respondents aged 15 years and over
- Available at <http://ec.europa.eu/COMMFrontOffice/PublicOpinion/>

METHODOLOGY

Eurobarometer

This report is based on the data published in the 84th Eurobarometer survey. It gives an idea of European citizens' perception of the trustworthiness of several types of media, and includes EU Member States as well as acceding and candidate countries. 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 also have the option to answer 'do not know'. The types of media included are television, radio, the written press, the Internet, and since 2014, also online social networks.

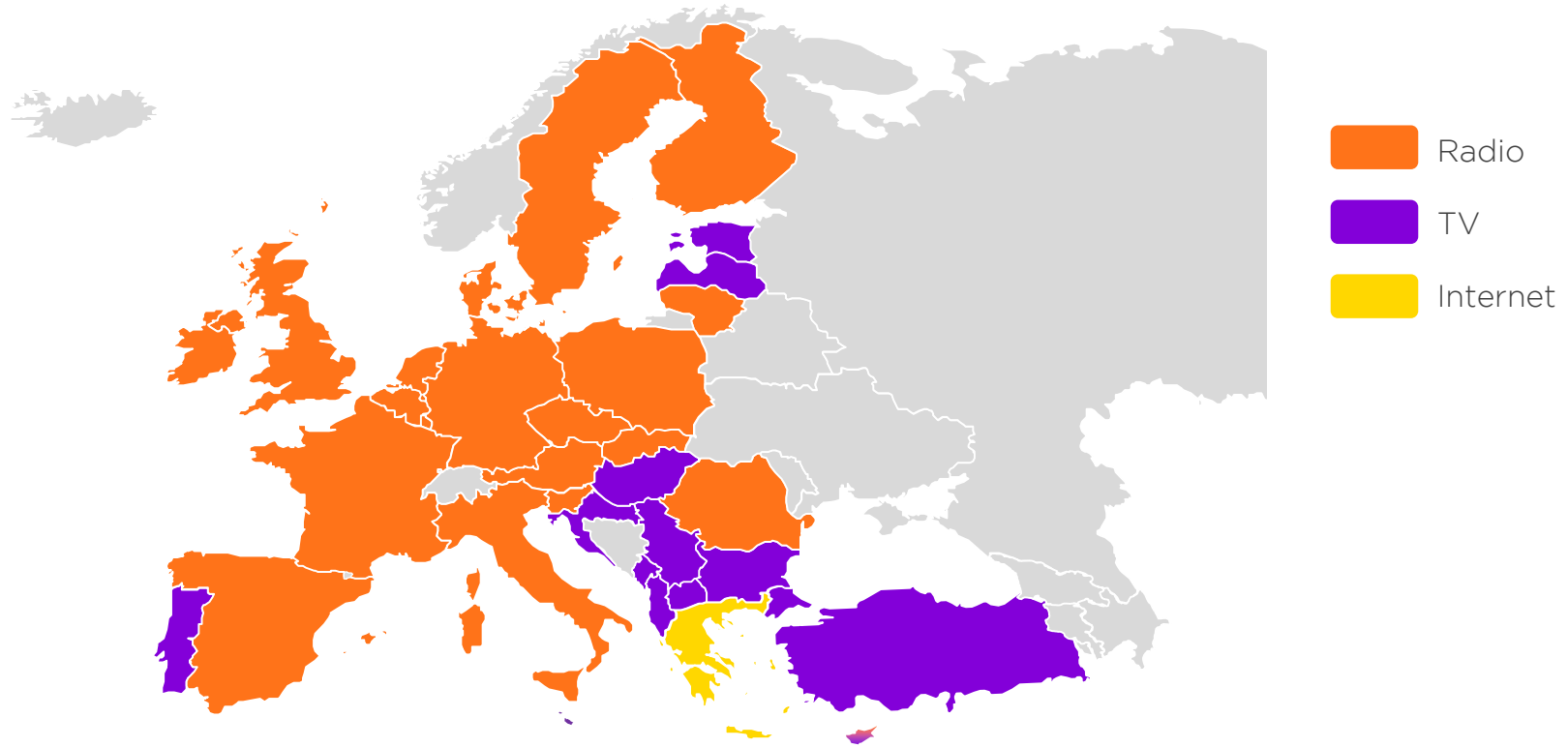
Net Trust Index

A net trust index was developed by the EBU-MIS in order to get a clearer idea on 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:

$$\text{Net Trust Index} = \text{'Tend to trust'} - \text{'Tend not to trust'}$$

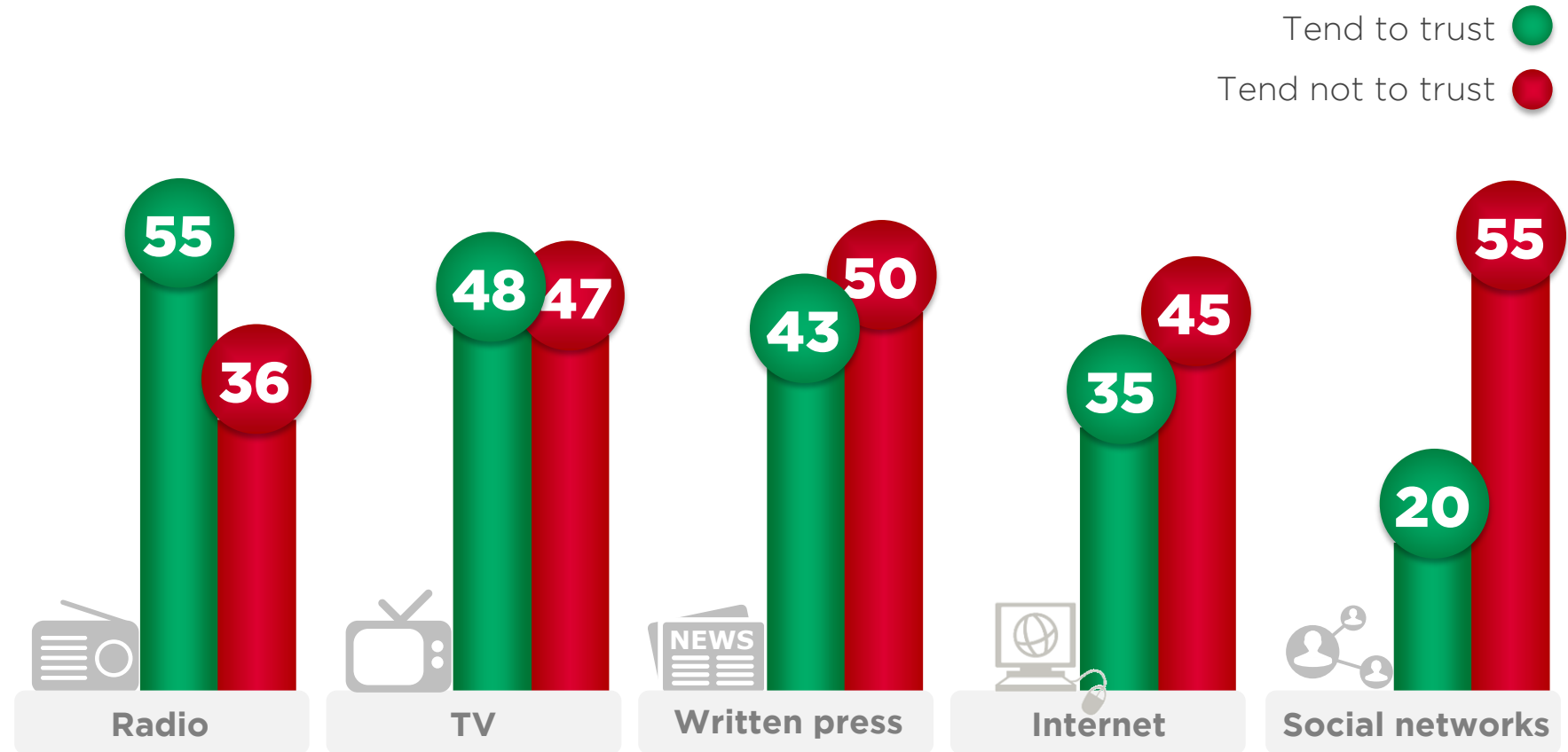
The net trust index makes it possible to rank the countries according to their level of trust in media, and also to compare the levels of trust across different types of media. It can be a positive value, meaning that on the whole, citizens tend to trust the given medium, or a negative value, which means that generally, citizens tend not to trust it.

MOST TRUSTED MEDIA IN EUROPE (2015)



- Radio is the most trusted medium in Europe (in 20 out of 33 countries, 61% of the countries surveyed)
- TV is generally the most trusted in south-eastern Europe

TRUST IN MEDIA ACROSS THE EU (% of population, 2015)



- Radio is the most trusted by EU citizens: 55% of the population trust it
- More people tend not to trust the written press, the Internet, and online social networks

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

NET TRUST IN MEDIA ON EU LEVEL

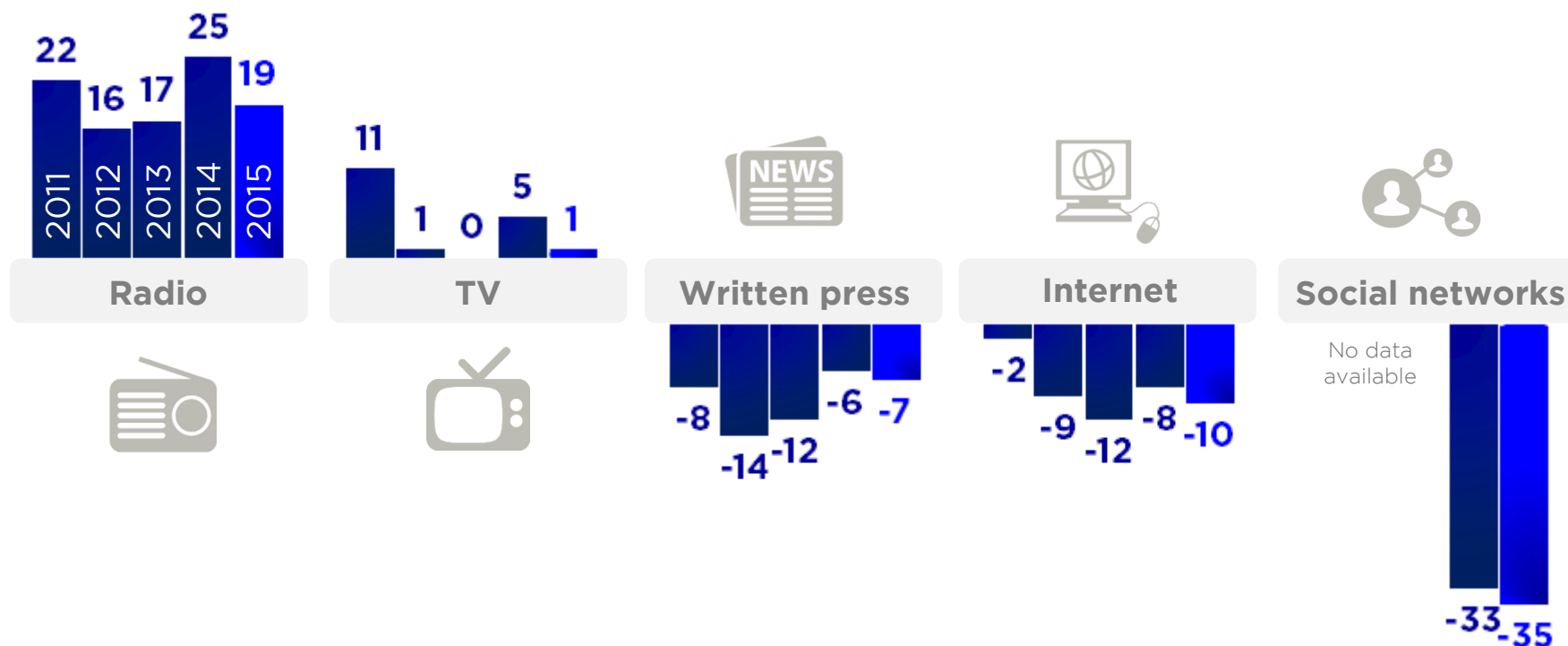


Net Trust Index = 'Tend to trust' - 'Tend not to trust'

EVOLUTION OF THE NET TRUST INDEX IN THE EU

2011 – 2015

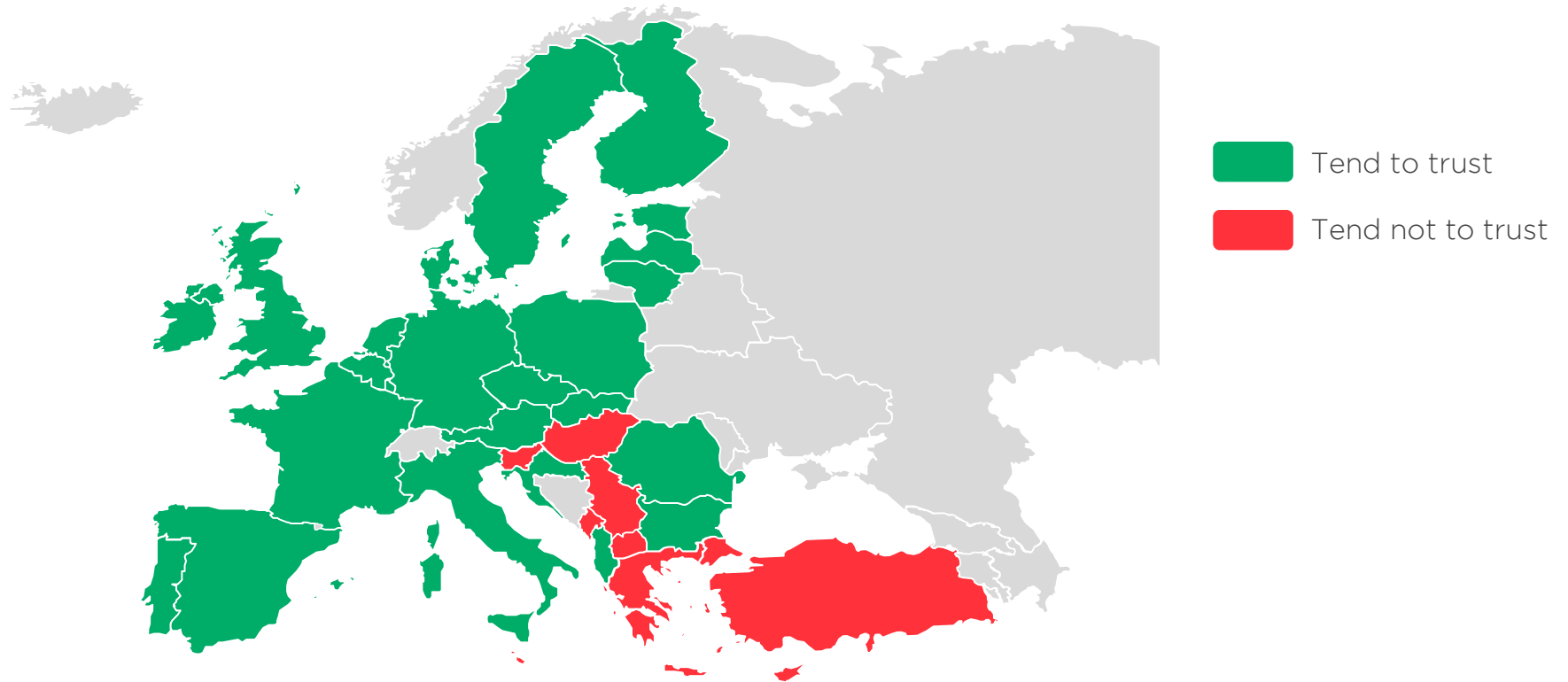
Net Trust Index = 'Tend to trust' – 'Tend not to trust'



- Following a substantial recovery last year, trust decreased in 2015 across all media
- TV and radio lost several points compared to 2014, while the written press, the Internet, and online social networks only experienced a slight decline
- On a 5-year basis, radio in the EU lost 3 points, while trust in TV decreased by 10 points. However, TV and radio still have a positive net trust index, as opposed to non-broadcast media
- Trust in the written press increased by 1 point compared to five years ago, while trust in the Internet decreased by 8 points, with both remaining in the negative throughout the past 5 years

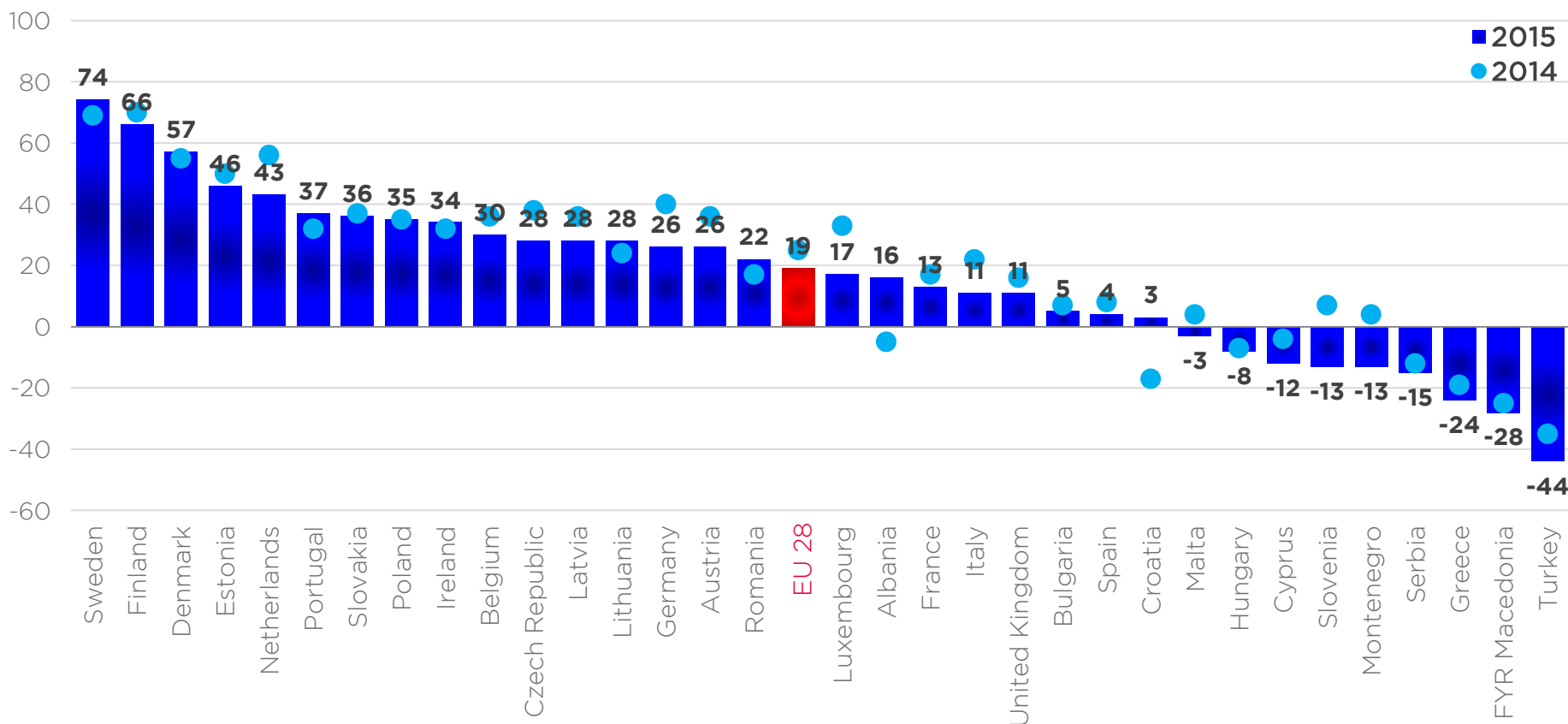


TRUST IN RADIO (2015)



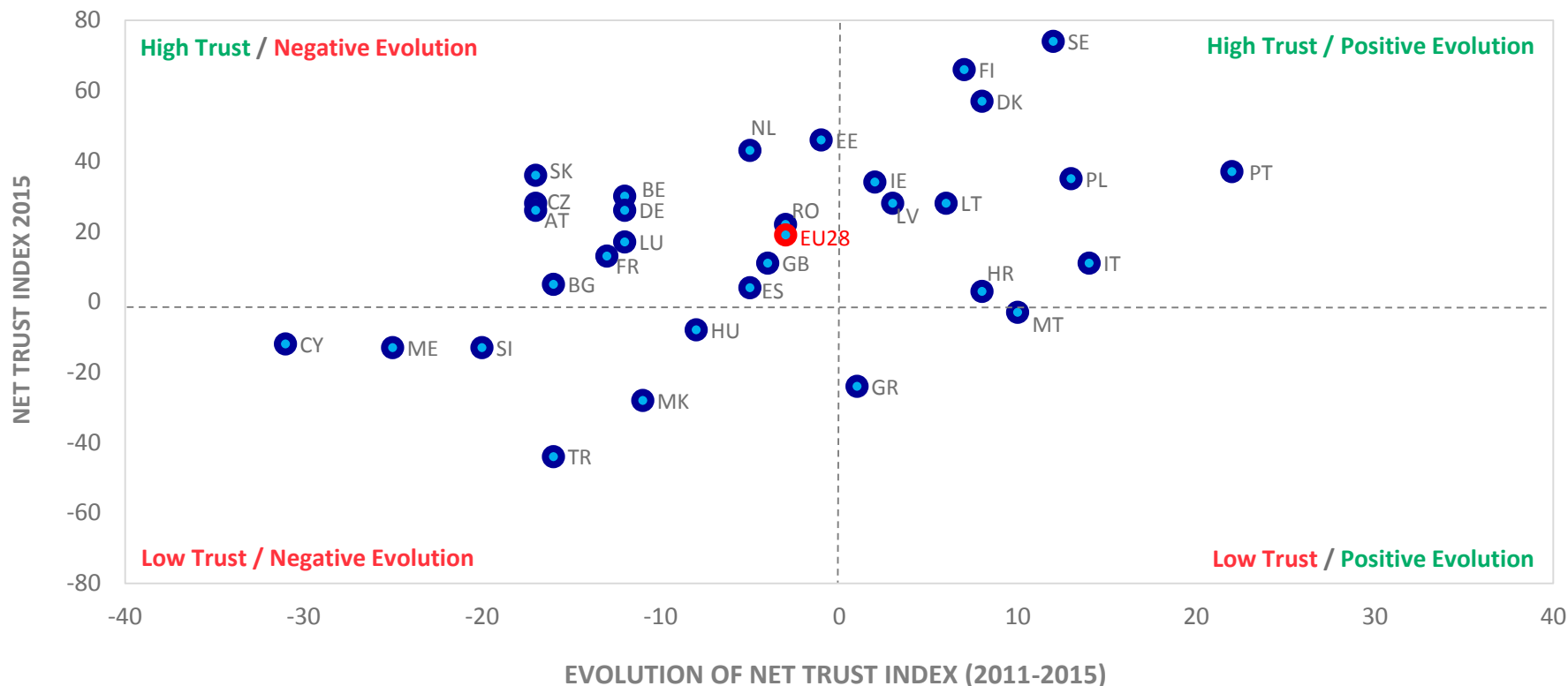
- People tend to trust radio in 24 out of the 33 countries surveyed (73%)
- In south-eastern Europe citizens tend not to trust radio

NET TRUST INDEX - RADIO (2014-2015)



- Nordic countries achieve the highest levels of trust in radio
- Trust in radio fell in 24 out of the 33 observed countries compared to last year, most remarkably in Slovenia (-20 points), Montenegro (-17), Luxembourg (-16) and Germany (-14)

EVOLUTION OF TRUST - RADIO (2011 - 2015)

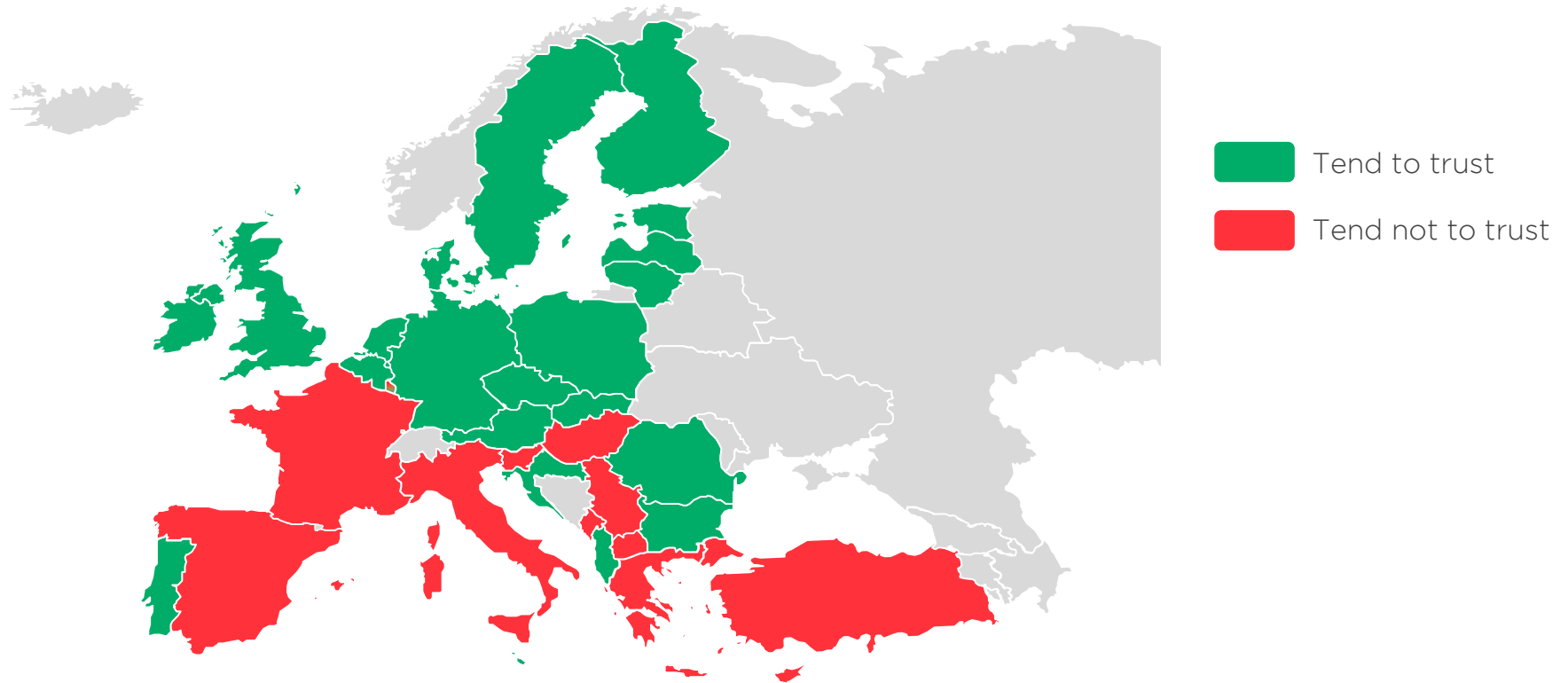


*Country codes listed in appendix

- Most of the countries showed a negative 5-year evolution of trust in radio
- On the EU level, trust in radio decreased by 3 points since 2011
- It is quite unlikely to recover trust once it is lost; only Malta and Greece managed to do it

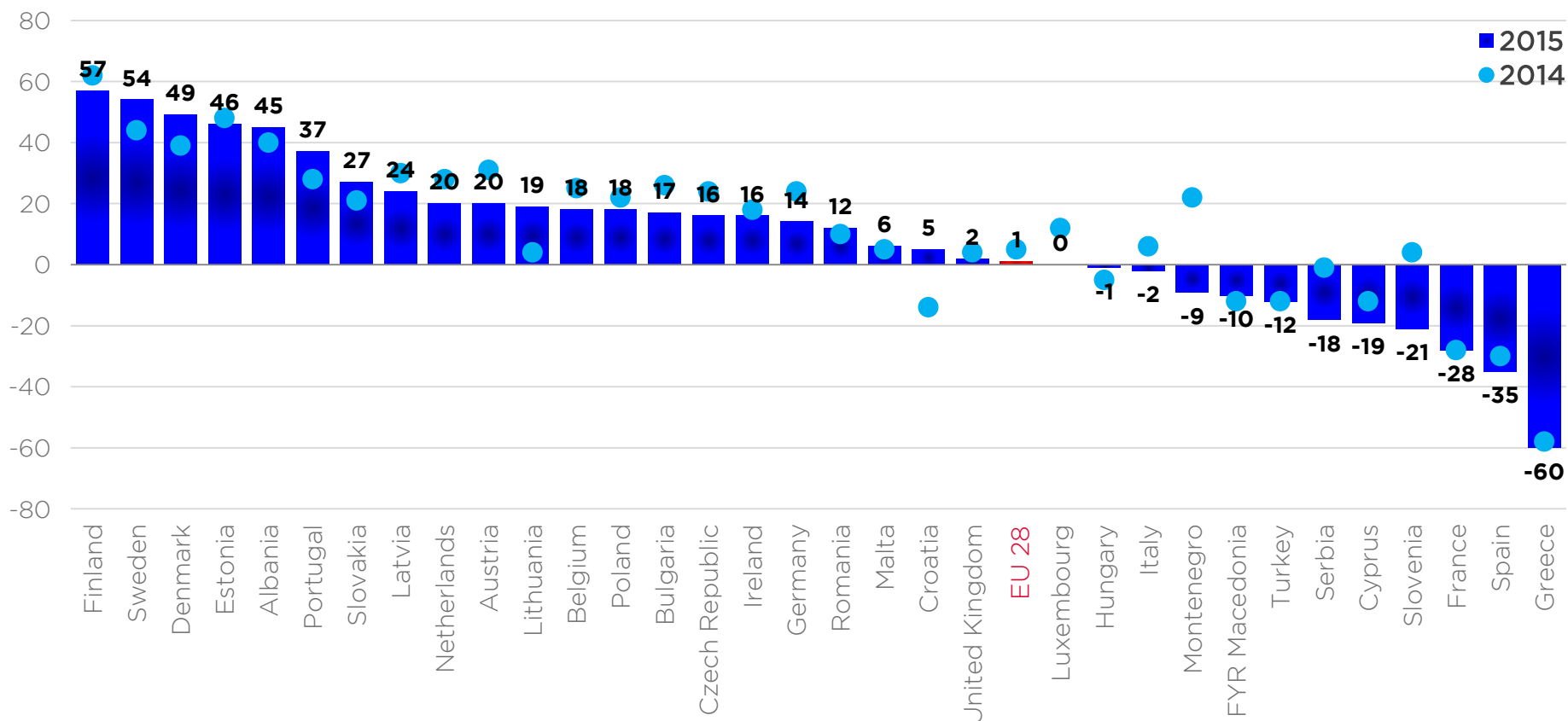


TRUST IN TV (2015)



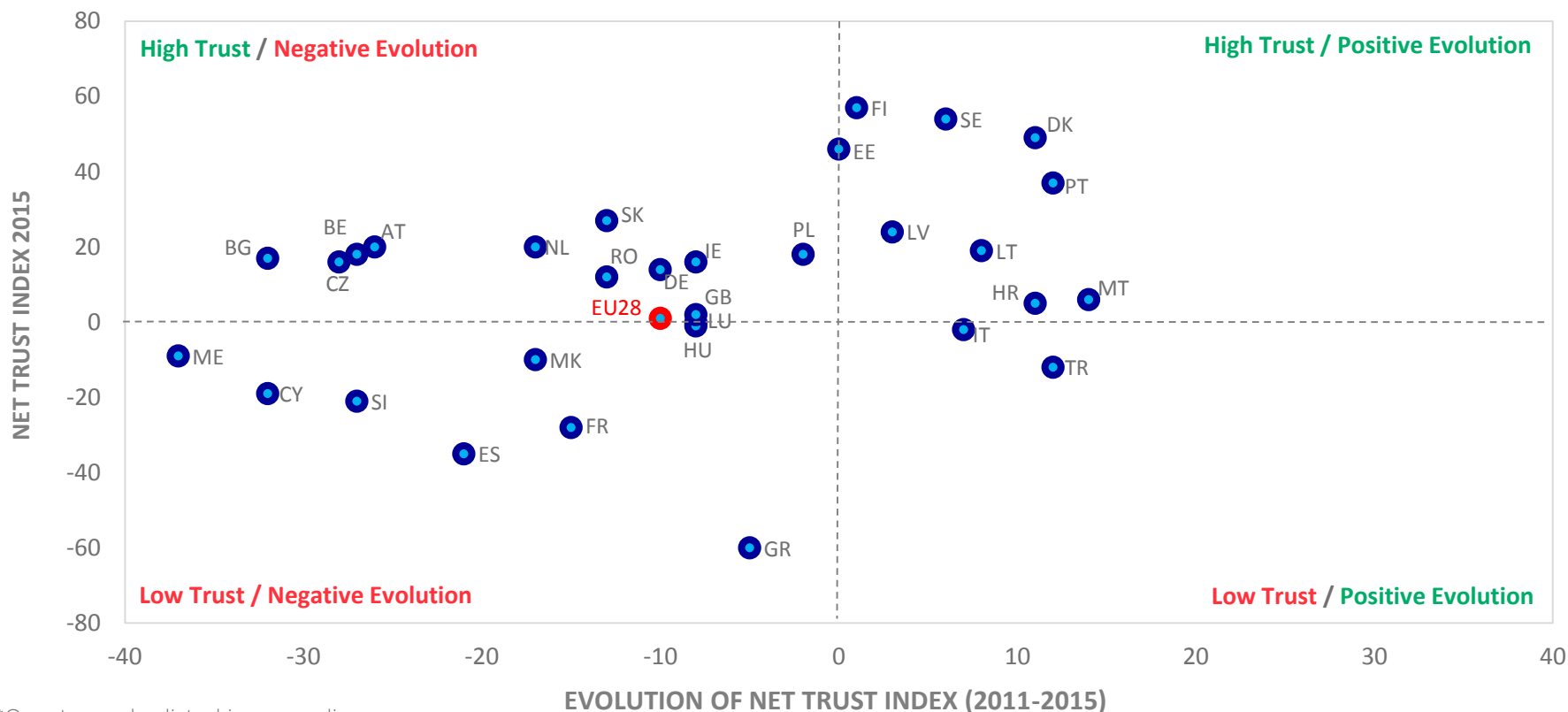
- People tend to trust TV in 21 out of the 33 countries surveyed (64%)
- Southern European countries show the lowest degree of trust in TV
- In Luxembourg, 'trust' and 'not-trust' levels were equal in 2015

NET TRUST INDEX - TV (2014-2015)



- As is the case with radio, Nordic countries achieve the highest levels of trust in TV
- South-eastern European countries show the biggest decrease in trust in TV (Montenegro, Slovenia and Serbia)

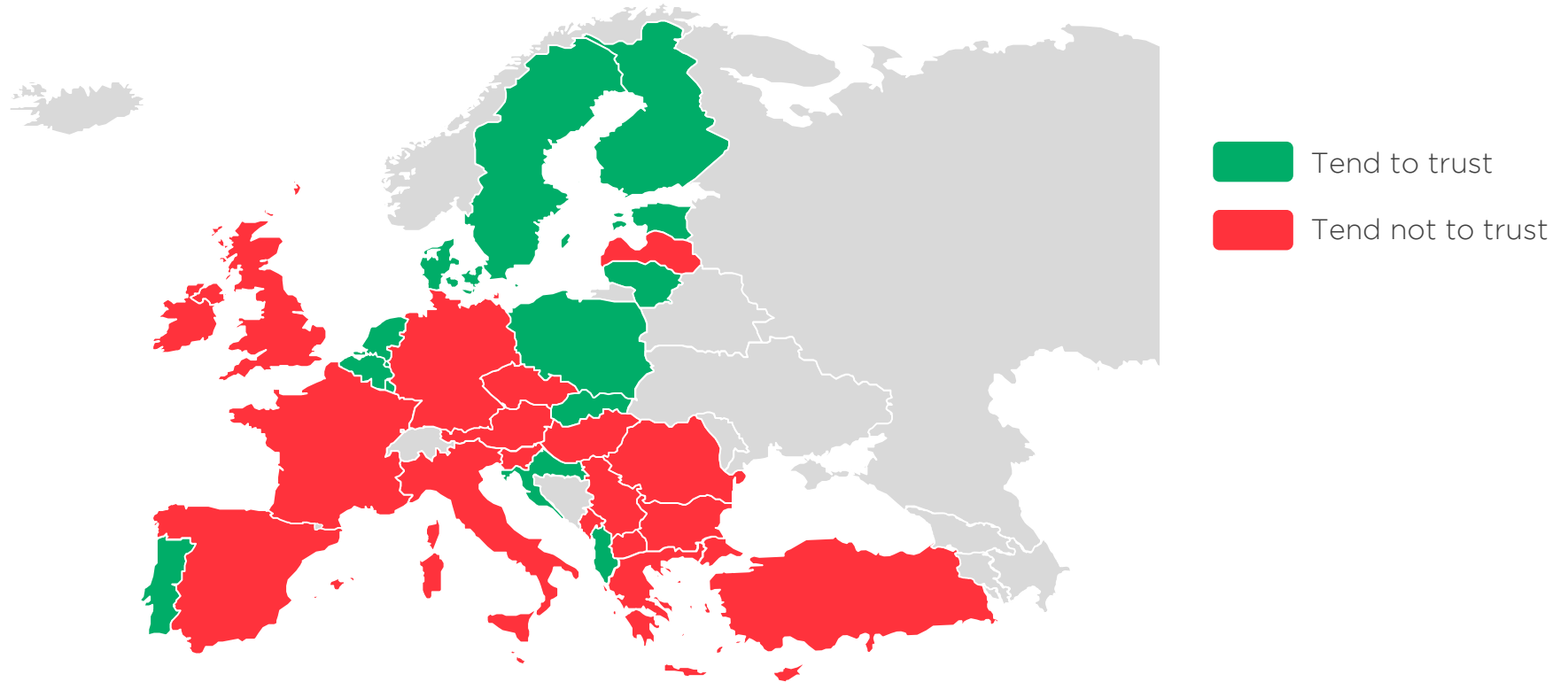
EVOLUTION OF TRUST - TV (2011 - 2015)



- Countries with the highest trust index also tend to have a more positive evolution
- 21 out of 33 countries had a negative 5-year evolution of trust in TV, led by Montenegro (-37 points), Cyprus (-32) and Bulgaria (-32)
- On the EU level, trust in TV dropped by 10 points compared to 2011

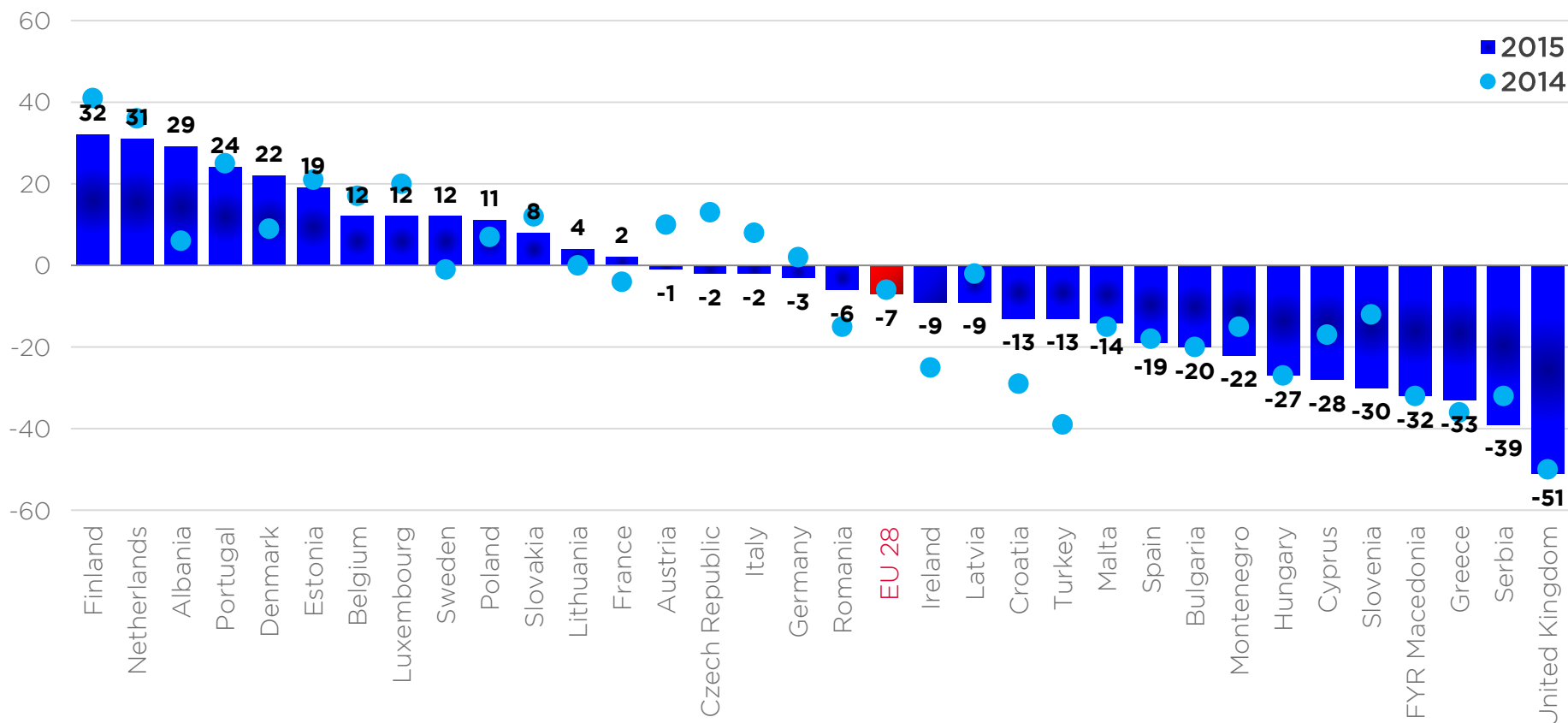


TRUST IN WRITTEN PRESS (2015)



- People tend to trust the written press in only 13 out of the 33 countries surveyed (39%)
- The press is more trusted in the Nordic and Benelux countries, but the situation is rather mixed within regions

NET TRUST INDEX - WRITTEN PRESS (2014-2015)



- In 2015, net trust in the written press in the EU decreased by 1 point
- However, 2015 also saw a sharp increase of trust in some southern European countries such as Turkey (+26 points), Albania (+23) and Croatia (+16)

EVOLUTION OF TRUST - WRITTEN PRESS

(2011 - 2015)

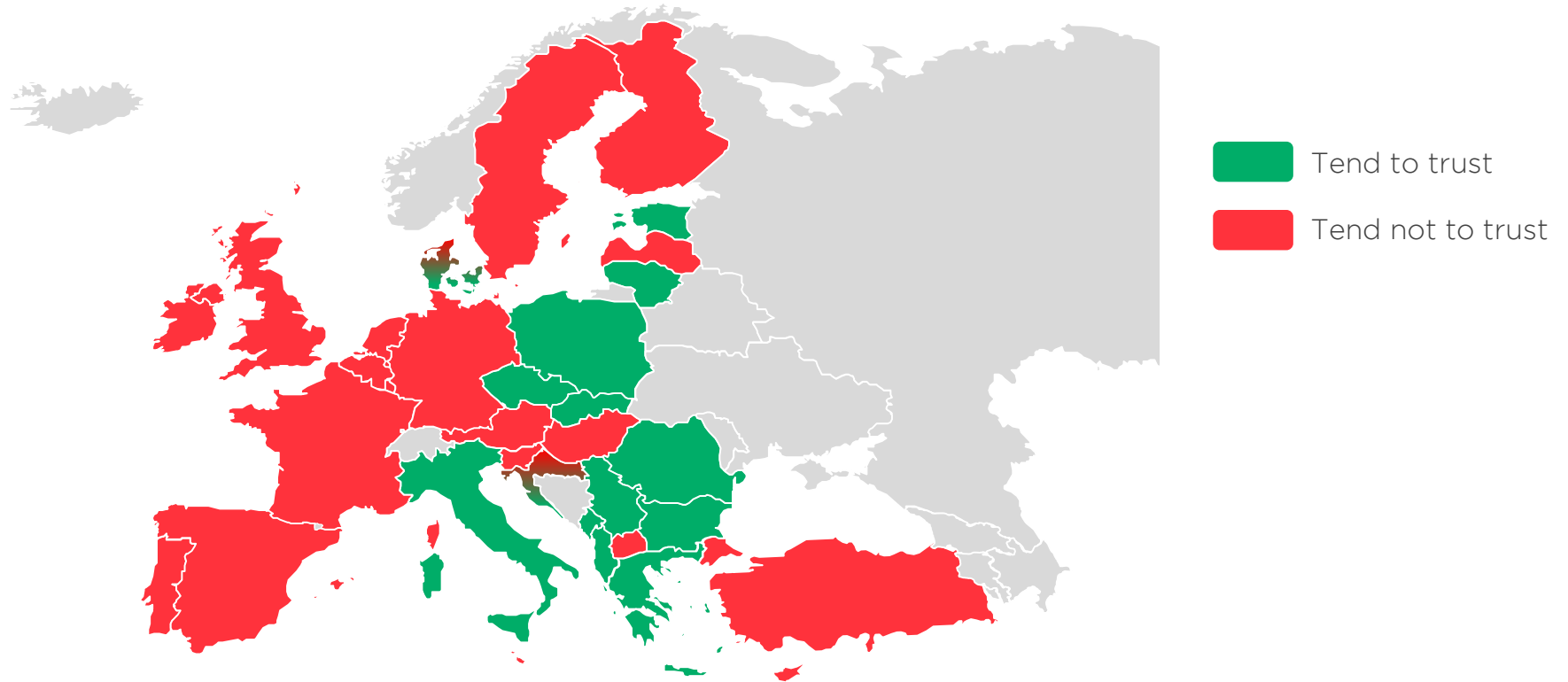


*Country codes listed in appendix

- 15 out of 33 countries showed a positive evolution of trust in the written press
- On the EU level, trust in the written press increased by 1 point since 2011
- The most substantial declines were experienced by Montenegro (-41 points), Cyprus (-28) and Austria (-24)

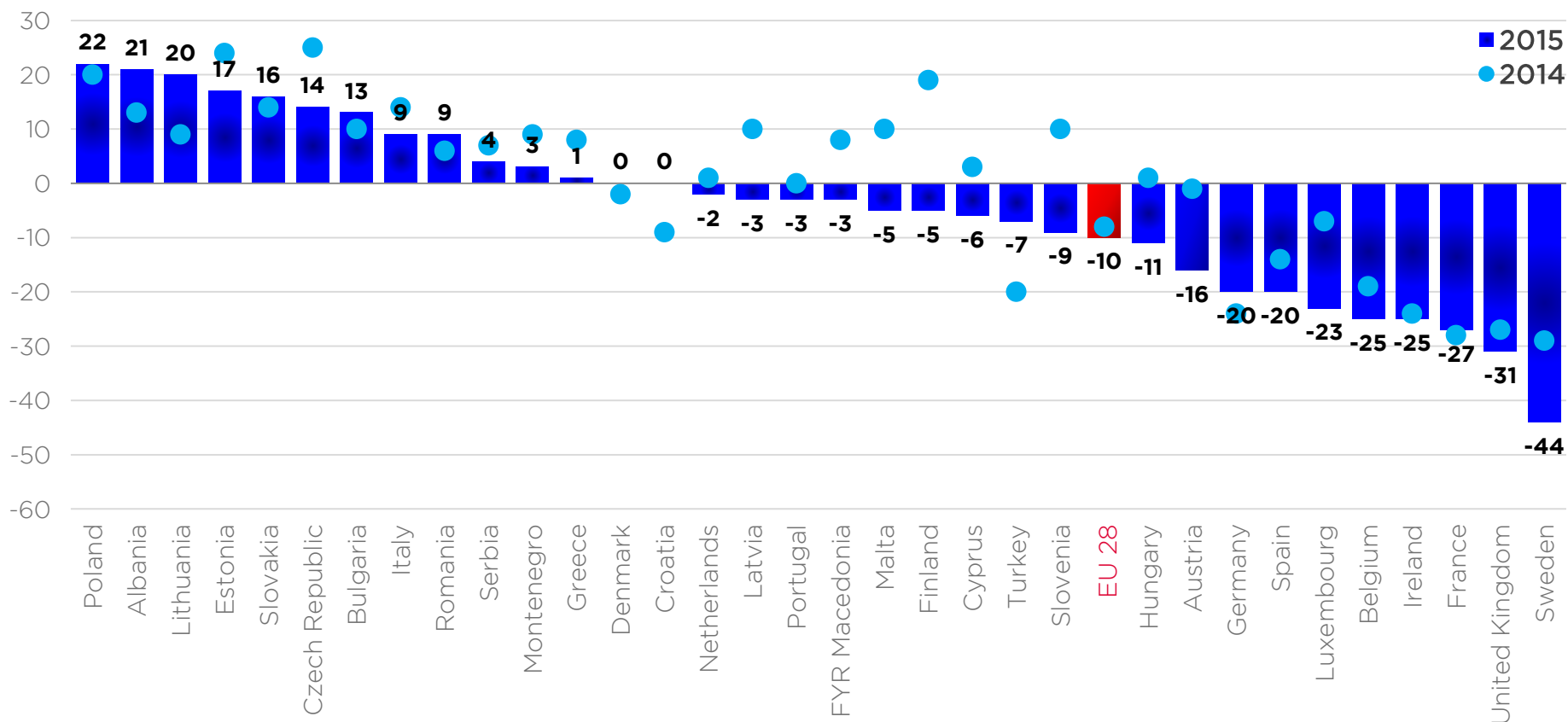


TRUST IN INTERNET (2015)



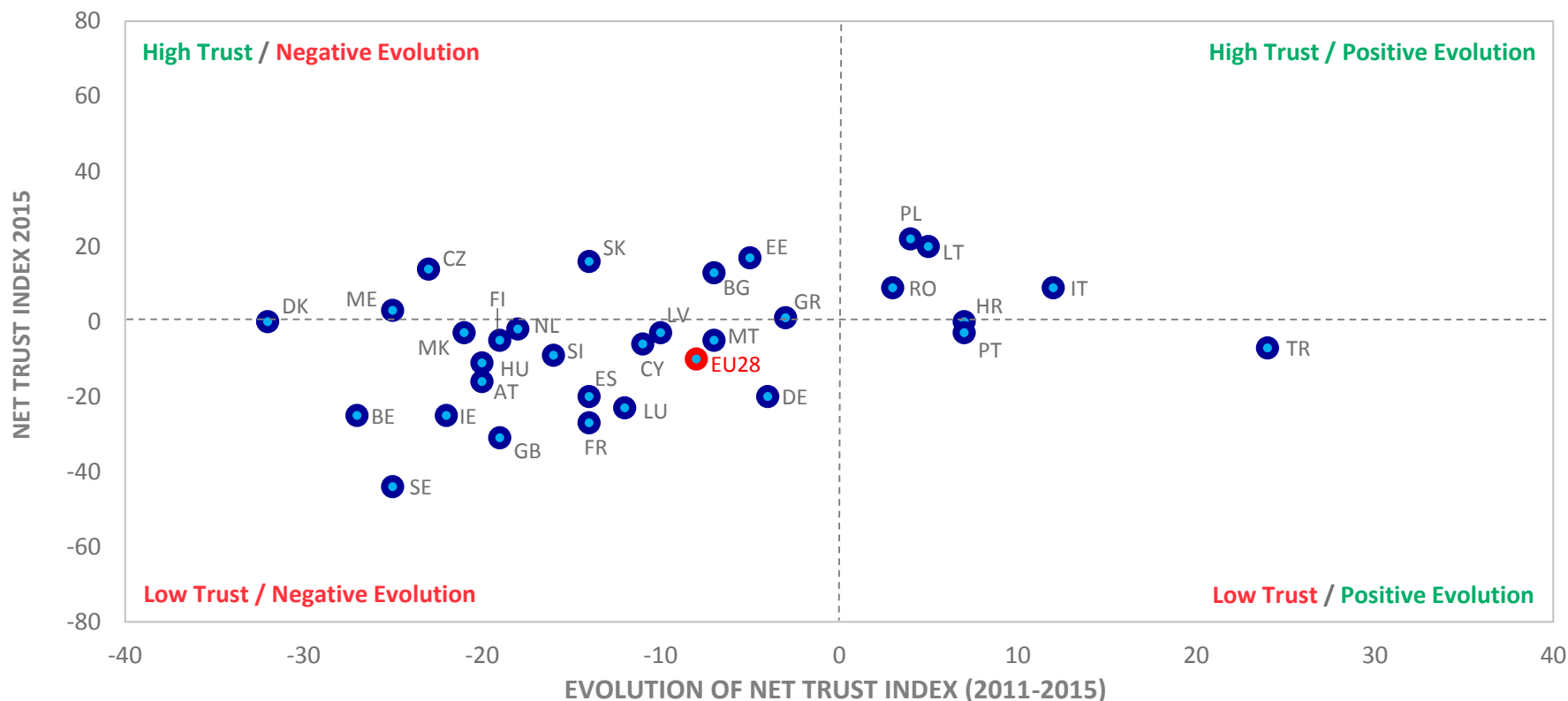
- People tend to trust the Internet in only 12 out of the 33 countries surveyed (36%)
- The Internet is trusted mostly in eastern European countries

NET TRUST INDEX - INTERNET (2014-2015)



- In 2015, trust in the Internet decreased by 2 points in the EU. Only 12 countries out of 33 trusted the Internet, compared to 20 in the year before
- The biggest drops were measured in Finland (-24 points) and Slovenia (-19)

EVOLUTION OF TRUST - INTERNET (2011 - 2015)

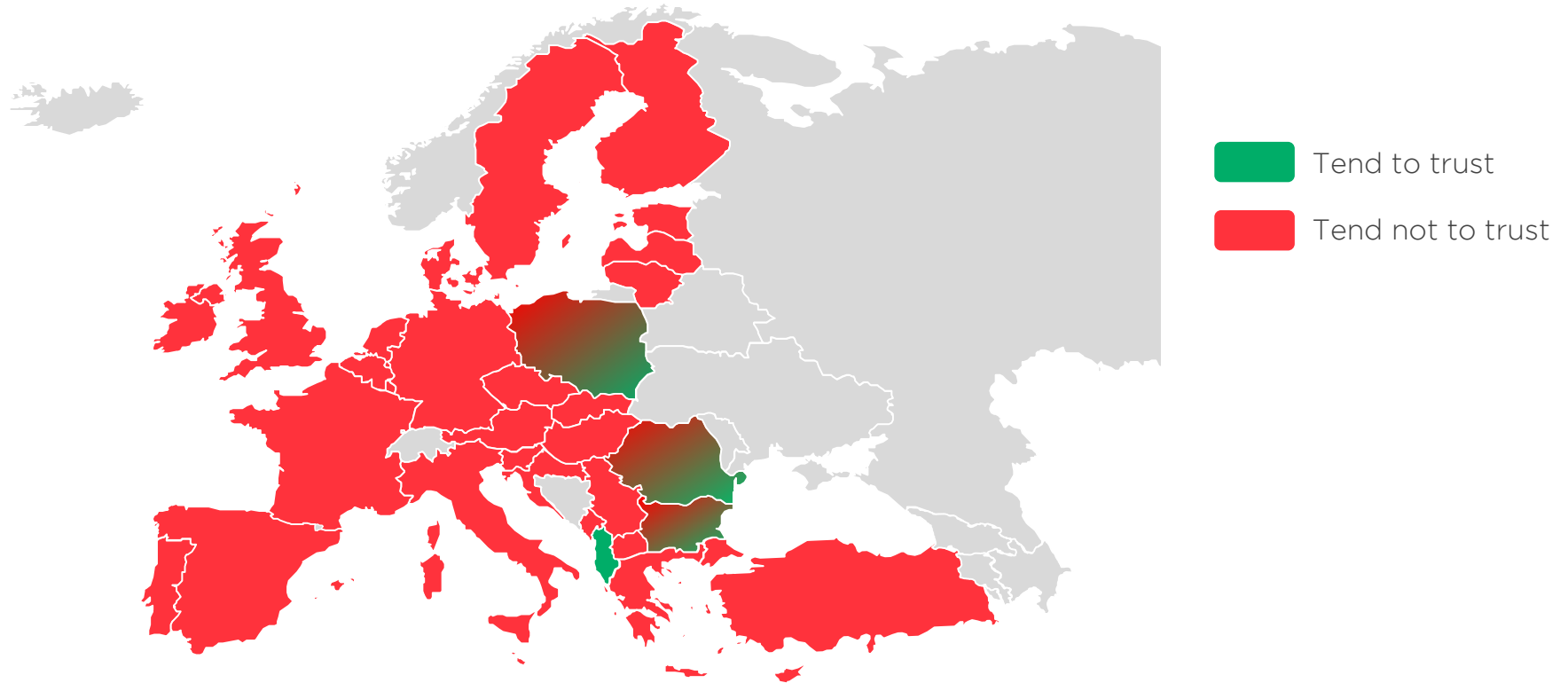


*Country codes listed in appendix

- In the past 5 years, trust in the Internet increased in only 7 countries
- The largest increase was achieved in Turkey (+24 points), although the net trust index is still negative
- On the EU level, trust in the Internet decreased by 8 points since 2011



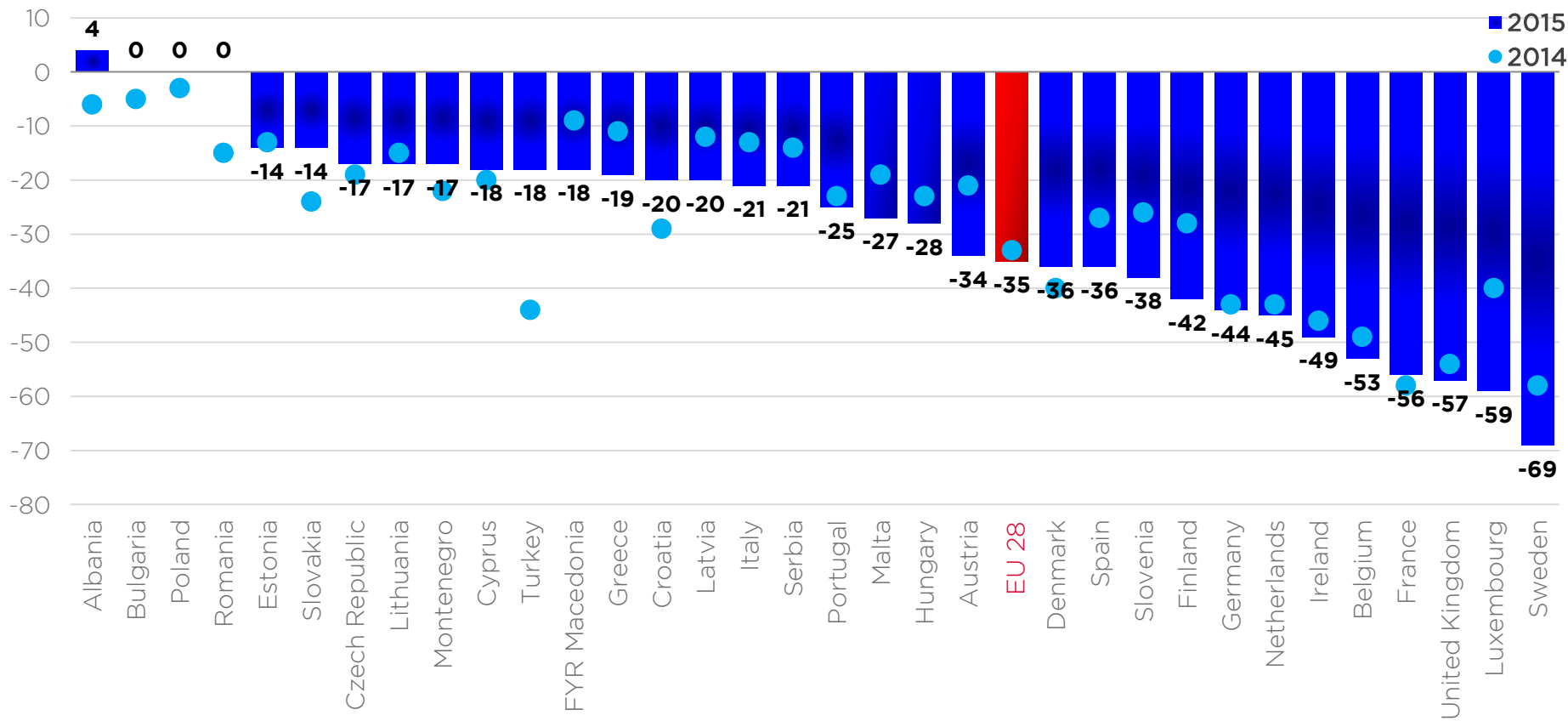
TRUST IN ONLINE SOCIAL NETWORKS (2015)



- Online social networks are only trusted in Albania
- In Poland, Romania and Bulgaria, 'trust' and 'not-trust' levels were equal amongst the population in 2015

NET TRUST INDEX - ONLINE SOCIAL NETWORKS

(2014-2015)



- Eastern countries tend to trust online social networks more, although the net trust index is still in the negative for 29 out of the 33 countries (88%)
- The largest increases compared to last year were observed in Turkey (+26 points) and Romania (+15)

KEY FINDINGS



Overall, broadcast media (radio and TV) are still the most trusted as opposed to the written press and online media. More precisely, radio is the absolute winner: it is the most trusted medium in 20 countries, while TV is the most trusted in 13 of them.



While the perception of online social networks has got slightly better, they are still the least trusted type of media in 15 countries. The written press is not perceived to be much more trustworthy: in 14 countries it was regarded as the least trusted.

↓ TRUST

Compared to last year's results, in 2015 an overall decrease of trust in media can be observed. There are slightly less countries with a positive net trust index when it comes to radio, TV, and the written press. Moreover, the Internet was regarded as trustworthy only in 12 countries this year, compared to 20 in 2014.

EU vs non-EU

From the 28 EU member states Cyprus, Hungary, and Slovenia scored a negative trust index across all five measured media sectors. Acceding and candidate countries typically experienced lower levels of trust in media, except for Albania, which enjoys one of the highest levels of trust in media overall.

THREE CLUSTERS OF TRUST



- Three clusters of media types can be identified according to the level of trust in them across countries/regions: broadcast, written press, and online media.

APPENDIX: COUNTRY CODES

AL - Albania

AT - Austria

BE - Belgium

BG - Bulgaria

CY - Cyprus

CZ - Czech Republic

DE - Germany

DK - Denmark

EE - Estonia

ES - Spain

FI - Finland

FR - France

GB - United Kingdom

GR - Greece

HR - Croatia

HU - Hungary

IE - Ireland

IT - Italy

LT - Lithuania

LU - Luxembourg

LV - Latvia

ME - Montenegro

MK - FYR Macedonia

MT - Malta

NL - Netherlands

PL - Poland

PT - Portugal

RO - Romania

RS - Serbia

SE - Sweden

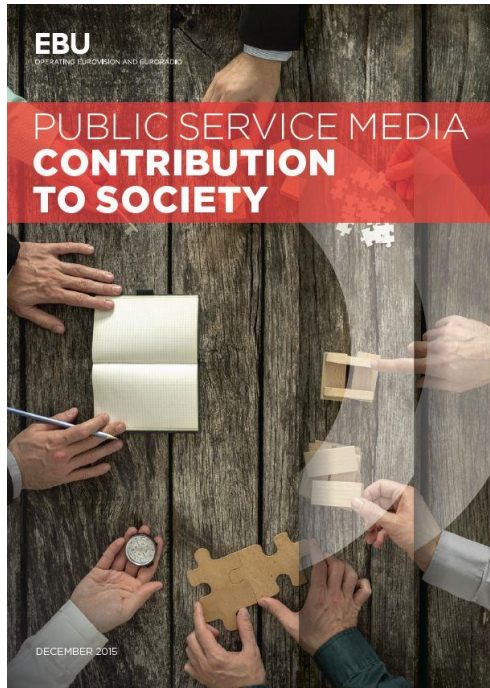
SI - Slovenia

SK - Slovakia

TR - Turkey

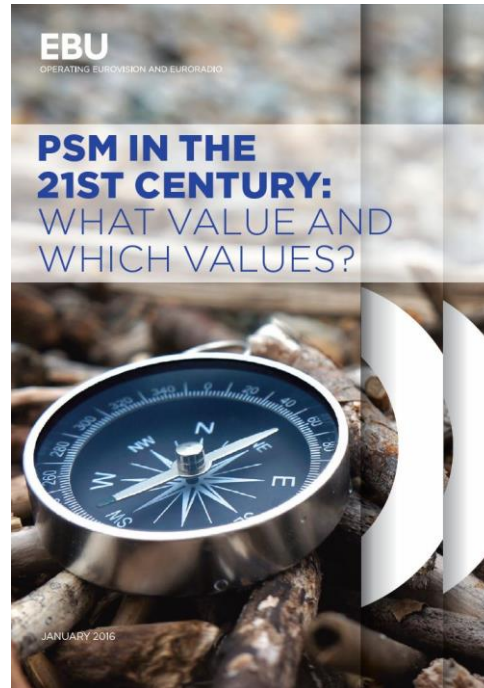
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FURTHER MEDIA INTELLIGENCE PUBLICATIONS



PSM CONTRIBUTION TO SOCIETY

(Open access)



PSM IN THE 21ST CENTURY: WHAT VALUE AND WHICH VALUES?

(Open access)

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MEDIA INTELLIGENCE SERVICE

This report has been produced by the Media Intelligence Service (MIS) at the European Broadcasting Union.

The EBU's Media Intelligence Service 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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