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# MARKET INSIGHTS

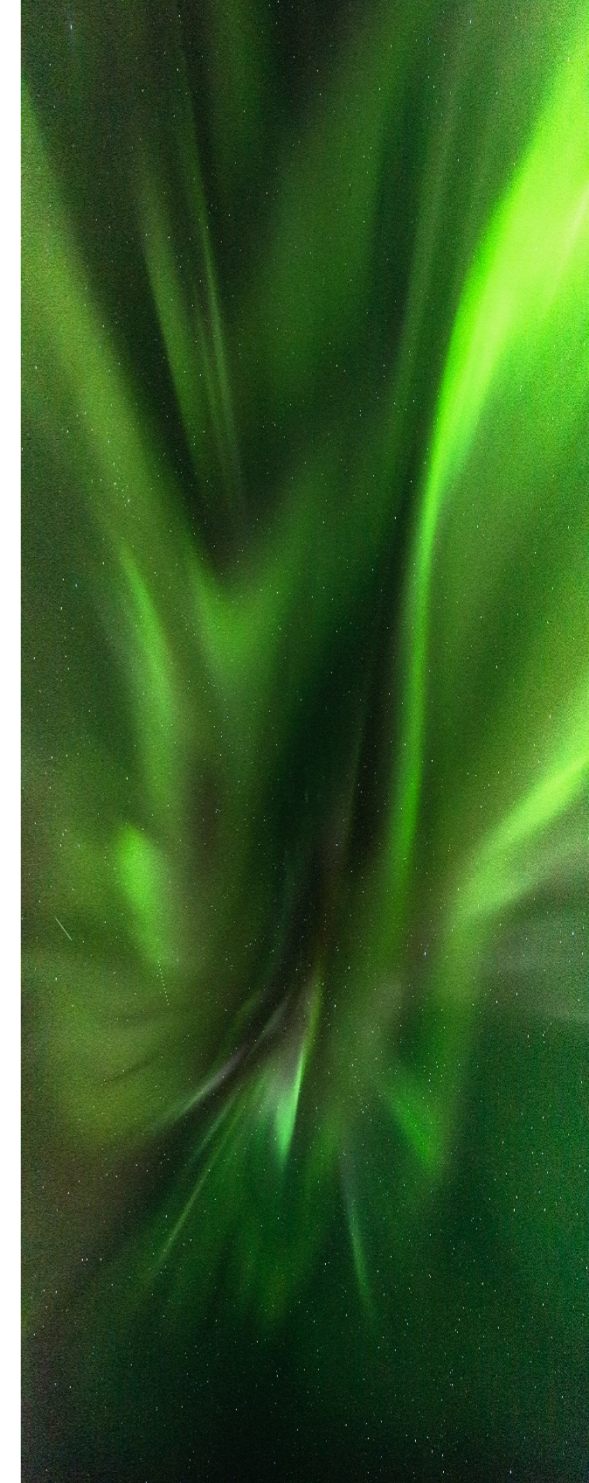
# **TRUST IN MEDIA 2021**

## PUBLIC VERSION

MEDIA INTELLIGENCE SERVICE  
SEPTEMBER 2021

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## 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. What is it?

- A public opinion survey by the European Commission, currently conducted by Kantar.
- An analysis of 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. The 94<sup>th</sup> edition underlying this report, however, could not be conducted face-to-face in all countries covered due to the COVID-19 sanitary crisis. Alternatively, online interviews were conducted in a range of countries. As a result, the year-on-year or long-term comparisons applied in this years' report need to be interpreted carefully because of potential caveats due to the changes in sampling.
- Available at <https://europa.eu/eurobarometer/surveys/latest>

## METHODOLOGY

This report is primarily based on data from the 94<sup>th</sup> Standard Eurobarometer, where the Net Trust Index is deducted from. The 94<sup>th</sup> wave of the survey was conducted in February-March 2021 in the 27 EU member states, the five candidate countries as well as the UK, and, for the first time, Bosnia-Herzegovina, Norway, and Switzerland. Iceland has been included again for the first time since 2014. Because of the COVID-19 pandemic, this wave of the survey was exceptionally conducted during winter (February-March 2021) instead of autumn 2020. Consequently, no 2020 data is available for trust in the different types of media. In the section about trust in news, the Reuters Institute Digital News Report 2021 is used as an additional source. Various other sources are used across the report and mentioned on the [references page](#).

### Eurobarometer

The question asked in the Eurobarometer survey is:

*'How much trust do you have in certain media? For each of the following media, do you tend to trust it 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 indices for each media and country covered since 2009 is [available online](#).

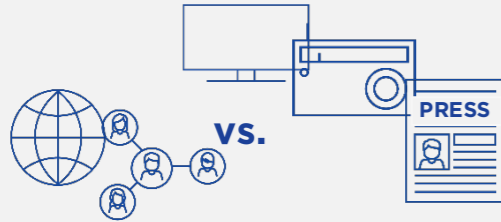
**Net Trust Index = 'Tend to trust' - 'Tend not to trust'**

### Reuters Institute Digital News Report 2021

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 of January/early February 2021 and reflects the online population of each country, comprising 46 countries worldwide, 24 of which in Europe. In Switzerland, the report distinguishes between the German- and French-language markets, and in Belgium between the Flemish-speaking and French-speaking markets, summing up to a total of 26 markets in Europe.

# KEY FINDINGS (1/2)

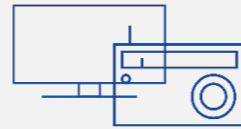
## The trust gap between legacy and online media persists



European citizens do not trust the internet and, even more so, social networks. These two media have constantly received negative Net Trust values since 2015, meaning that a majority of the EU population do not trust them. Trust in social networks has constantly declined and now is at its lowest since it was first measured in 2014.

By contrast, legacy media – radio, TV, and the written press – now all receive positive Net Trust values. Most EU citizens trust them, and trust levels have remained stable or even increased in recent years.

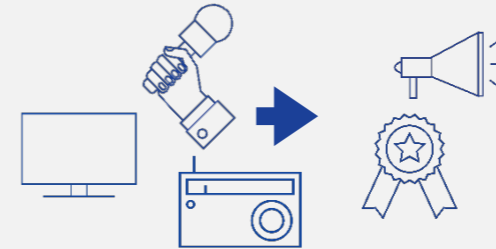
## High trust in PSM news



Scoring as most trusted news brands in more than 60% of markets, public broadcasters are relied on by citizens for credible information.

Globally seen, trust in news has increased since the beginning of the COVID-19 pandemic. Trust levels are on the rise. Yet the trust gap is widening between news found through search engines or social media on the one hand, and news in general as well as news people use on the other. This might mirror widespread concern about misinformation online among citizens.

## Press freedom correlates with trust in radio and TV



The higher the level of trust in a country's radio and TV stations, the greater freedom of the press in the country.

This 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

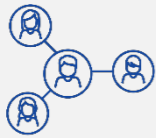


The more citizens perceive PSM in their country to be free from political pressure, the higher the level of trust in the information provided by national media in general. Moreover, the more citizens think that their national PSM are independent, the more they trust PSM news.

Thus, strong and free PSM are a key component of a credible news media landscape, which benefits PSM's competitors as well.

# KEY FINDINGS (2/2)

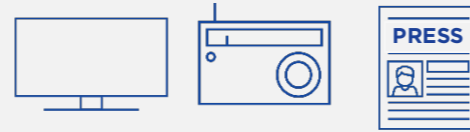
## Social networks are least trusted



Radio and TV continue to be the most trusted media throughout Europe. Radio is most trusted in 24 of the 37 European countries covered, TV in another 7 countries. This means that in 84% of the countries, one of the two broadcast media is perceived as most trustworthy by citizens.

By contrast, social networks are least trusted in 32 countries (86%).

## Legacy media are more trusted than politicians



EU citizens only trust their national army and police more than radio. TV and the written press rank in the middle third, almost on par with the judiciary.

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

## Trust in news goes along with a perceived diversity of views



There is a positive correlation between trust in news and the degree to which citizens are convinced that their national media cover a diversity of views and opinions.

Consequently, citizens seem to value a national news media landscape which gives voice to various actors, thus upholding ideals of impartiality in the news.

## Trust is complicated



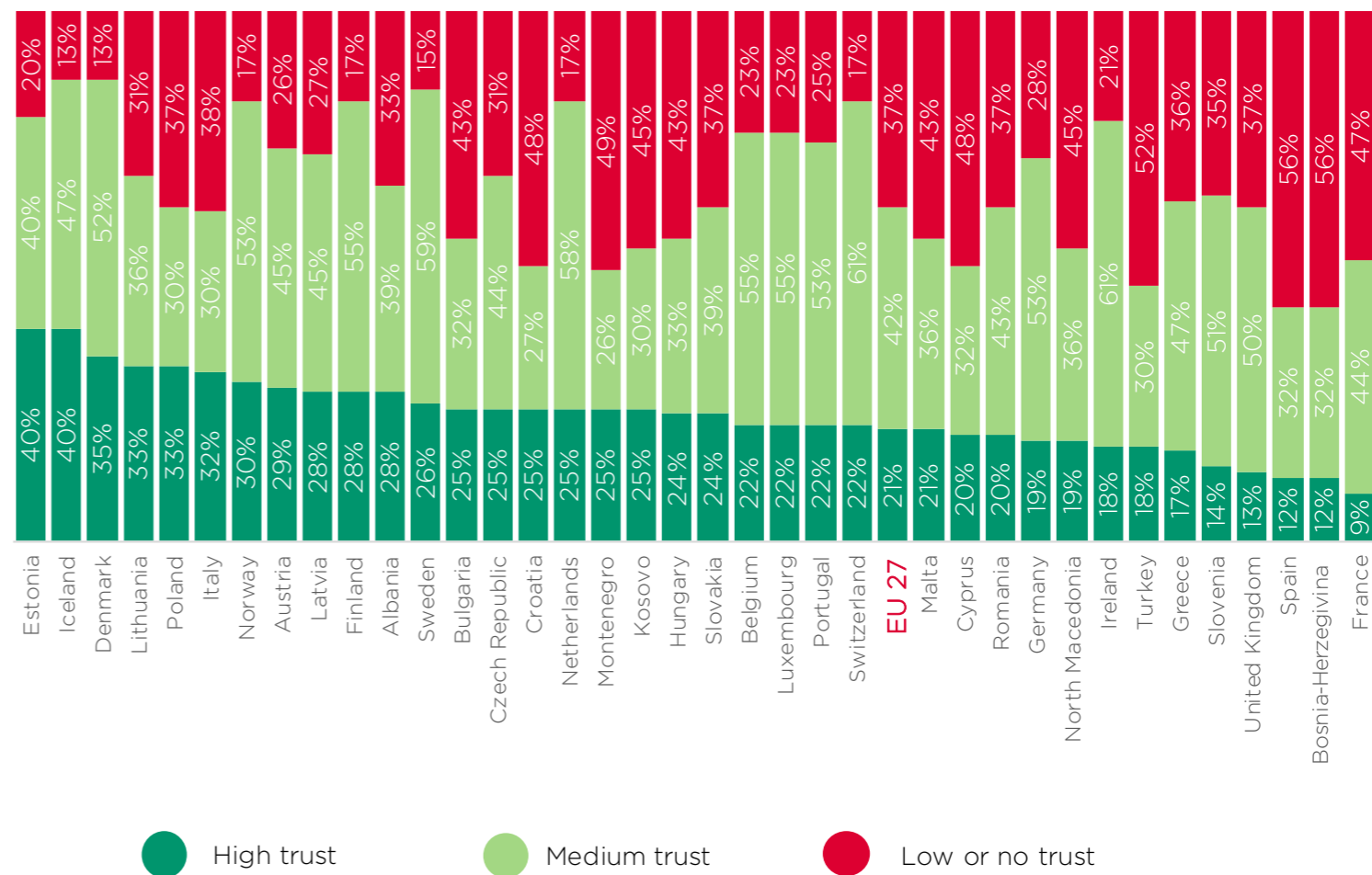
Rather than a one-size-fits-all strategy for renegotiating and strengthening audience trust, media organizations must cope with varying degrees of trust across different groups in society.

Academic and industry research reveals that groups in society such as those holding strong partisan and populist views are less likely to trust the media.

# TRUST IN MEDIA ACROSS EUROPE

# TRUST IN MEDIA VARIES CONSIDERABLY ACROSS EUROPE

## TRUST IN MEDIA (% of population, 2021)

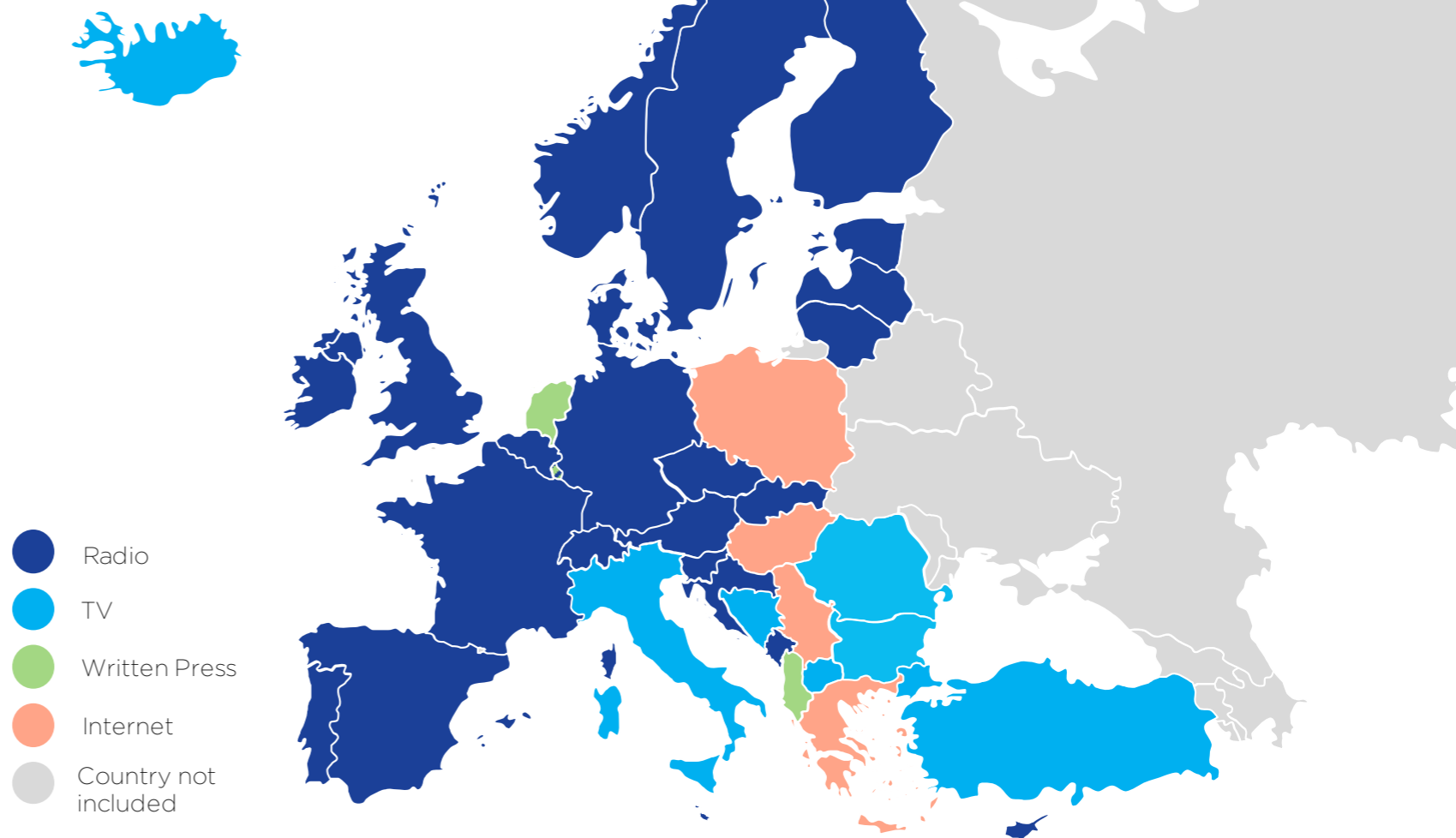


- In Spain, Bosnia-Herzegovina, and Turkey, more than half of the population do not trust the media. In France, less than 10% of the population express high levels of trust in the media.
- In the Nordic countries as well as in Switzerland and the Netherlands, less than 20% of the population have low or no trust in the media.
- Medium levels of trust are highest in Switzerland, Ireland, the Benelux States, as well as Sweden and Finland.

# RADIO IS THE MOST TRUSTED MEDIUM IN EUROPE

## MOST TRUSTED MEDIA

(Net Trust Index 2021)



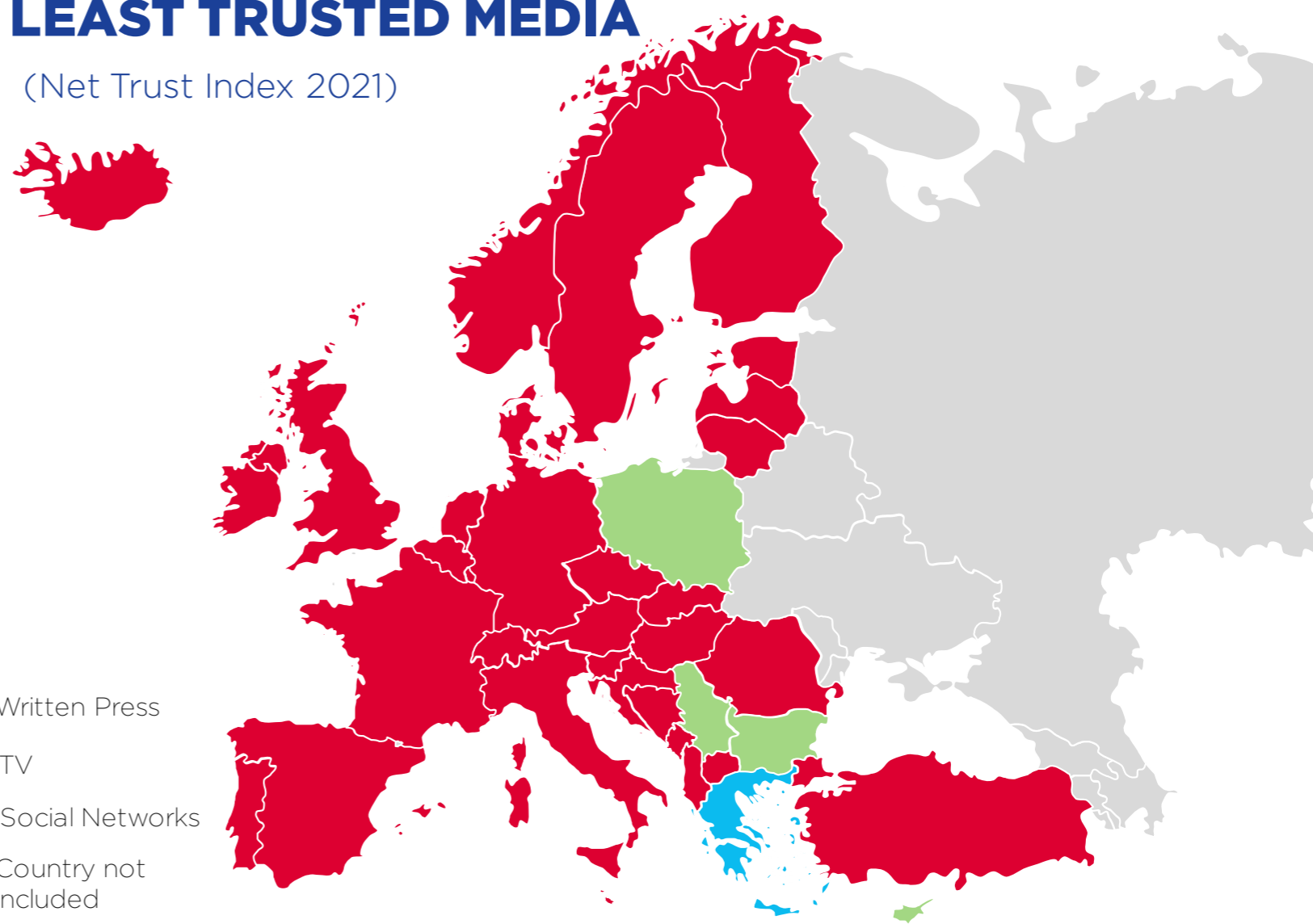
- Radio is the most trusted medium in Europe, scoring highest in 24 of 37 countries (65%).
- TV is most trusted in seven countries (19%): Bosnia-Herzegovina, Bulgaria, Iceland, Italy, North Macedonia, Romania, and Turkey.
- The internet is most trusted in Greece, Hungary, Poland, and Serbia, the written press in the Netherlands and Albania. In Luxembourg, the press and radio are equally trusted. Nowhere on the continent, social networks rank as most trusted medium.



# SOCIAL NETWORKS ARE BY FAR LEAST TRUSTED

## LEAST TRUSTED MEDIA

(Net Trust Index 2021)

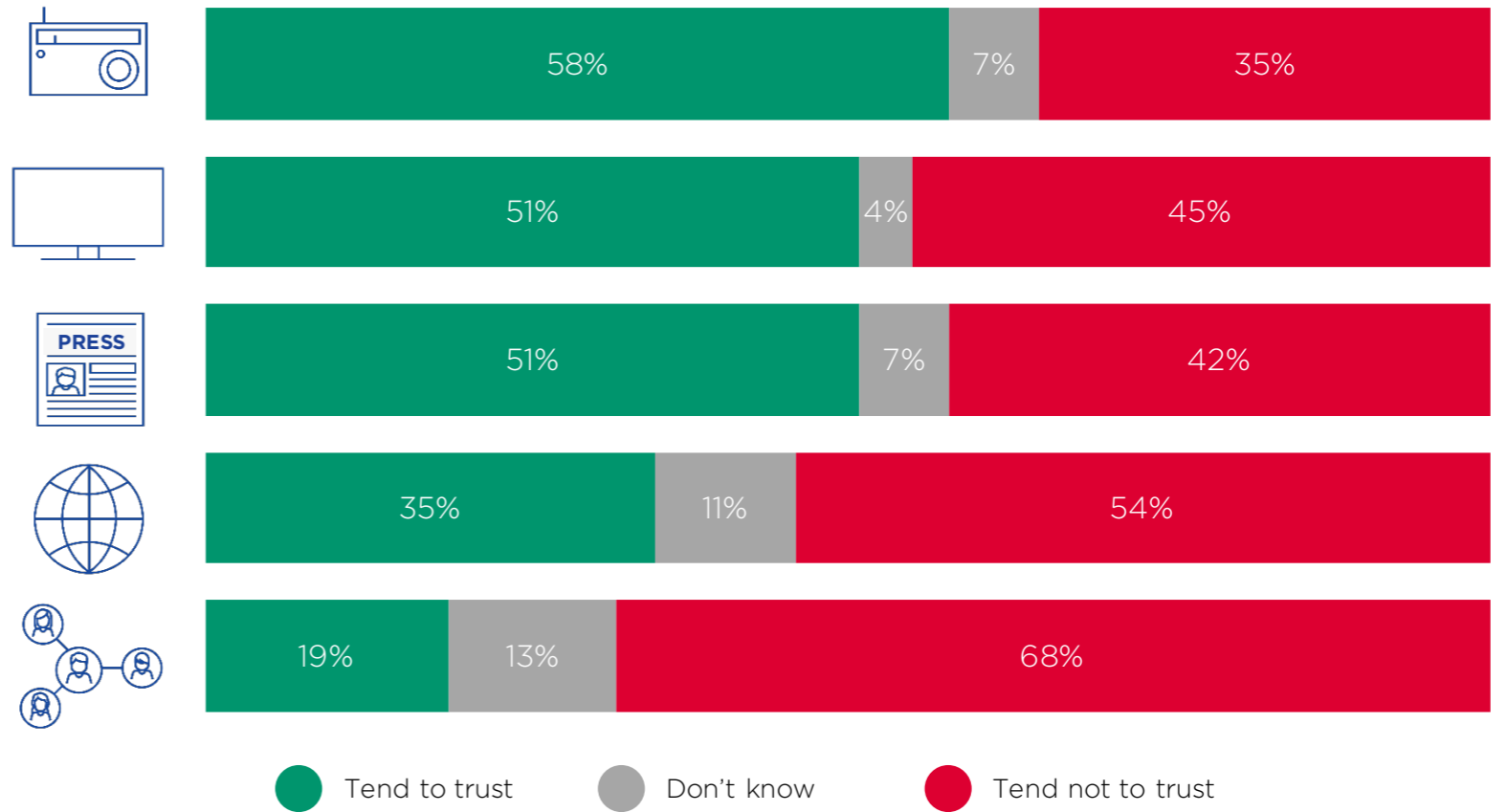


- Social networks are least trusted in 32 of the 37 countries (86%), thus being by far the least trusted medium across the continent.
- The written press is least trusted in 4 countries (11%): Bulgaria, Cyprus, Poland, and Serbia.
- TV is least trusted in only one country: Greece.
- Nowhere on the continent is radio the least trusted medium. The same goes for the internet.

# AT EU LEVEL, A MAJORITY OF CITIZENS TRUST LEGACY MEDIA

## TRUST IN MEDIA IN THE EU

(% of population, 2021)



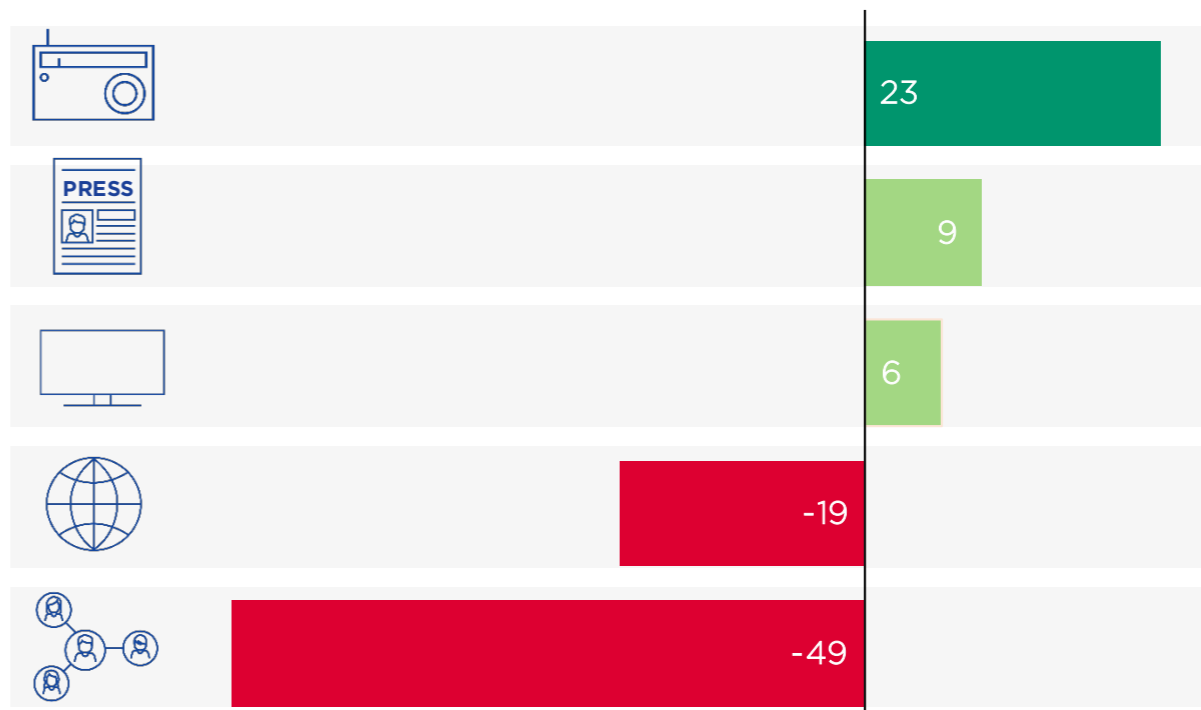
Note: Survey results at EU level represent a weighted average across the 27 EU Member States, applying official population figures provided by EUROSTAT.

- Radio is the most trusted medium by EU citizens: 58% of the population trust it.
- Half of EU citizens trust TV and the written press respectively.
- The internet and particularly online social networks are the least trusted media at EU level. Less than 20% of EU citizens tend to trust social networks.

# EU CITIZENS DO NOT TRUST THE INTERNET AND SOCIAL NETWORKS

## EU NET TRUST INDEX

(2021)



**NET TRUST INDEX =**

**'% of people who tend to trust' - '% of people who tend not to trust'**

**AVERAGE NET TRUST IN LEGACY MEDIA = 13**

**AVERAGE NET TRUST IN ALL MEDIA = -6**

**AVERAGE NET TRUST IN ONLINE MEDIA = -34**

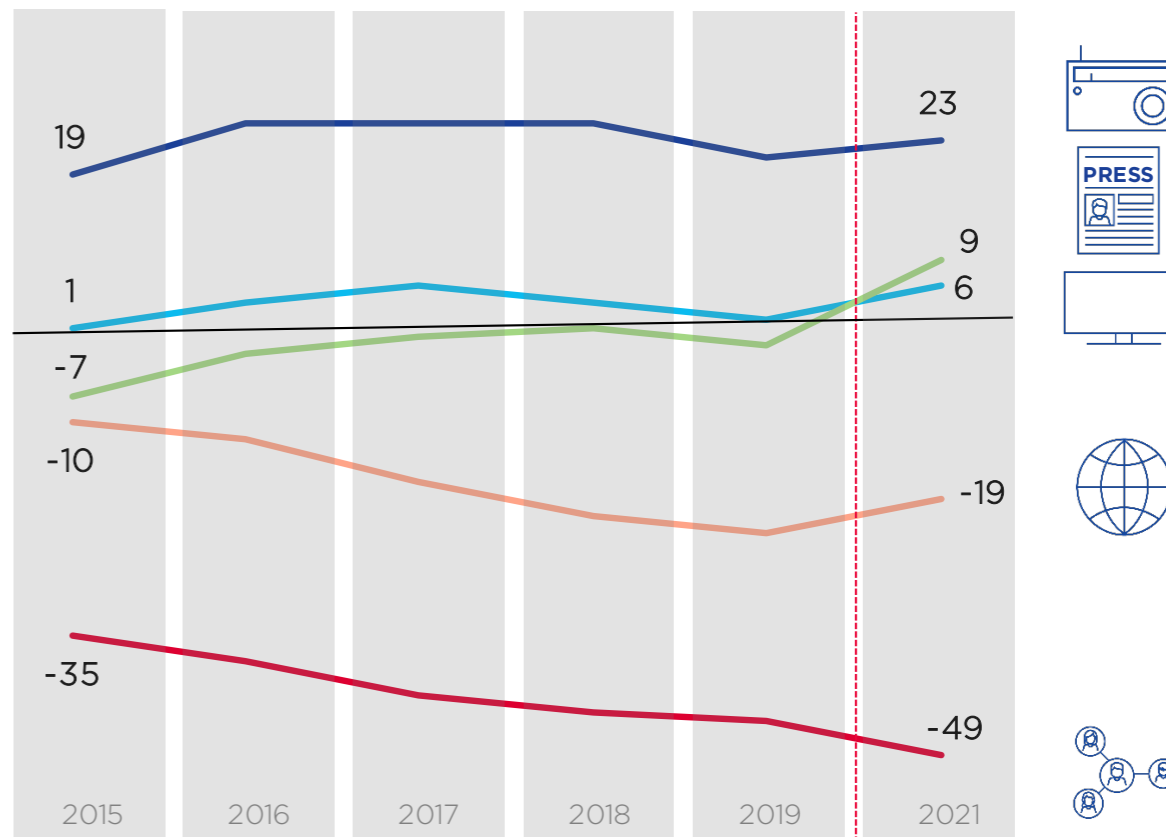
Note: Survey results at EU level represent a weighted average across the 27 EU Member States, applying official population figures provided by EUROSTAT.

- In 2021, only legacy media (Radio, the written press, and TV) receive positive Net Trust values, indicating that the majority of EU citizens trust these media.
- Radio leads by far, receiving a Net Trust value of +23 points.
- The internet and social networks receive negative Net Trust values, which means that most EU citizens do not trust them. Social networks lag far behind.

# THE TRUST GAP BETWEEN LEGACY AND ONLINE MEDIA PERSISTS

## EVOLUTION OF EU NET TRUST INDEX

(2015-2021)



**NET TRUST INDEX =**

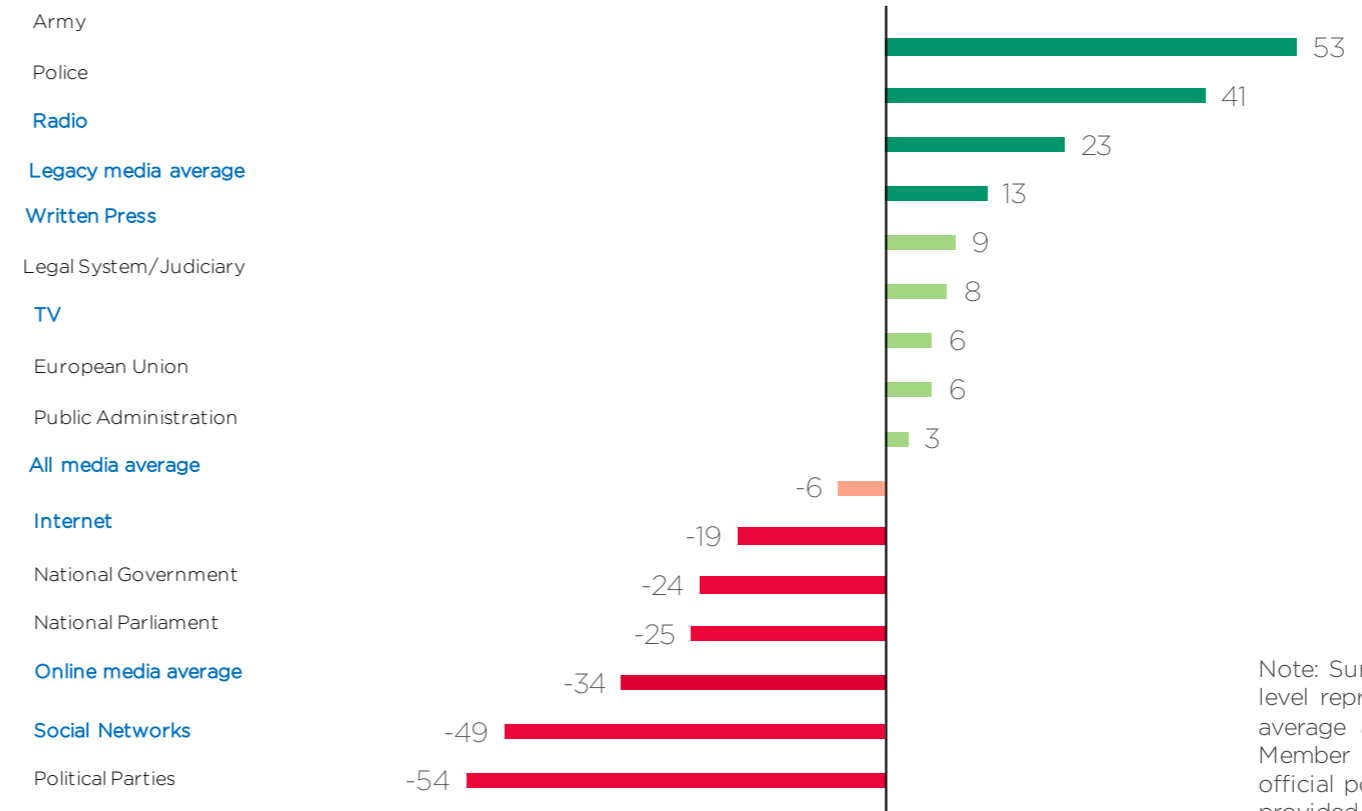
**'% of people who tend to trust' - '% of people who tend not to trust'**

Note: Survey results at EU level represent a weighted average across EU Member States, applying official population figures provided by EUROSTAT. Until 2019: Data includes UK (EU28); from 2021: EU 27 only. Comparisons should thus be drawn carefully due to this and changes of methodology in a range of countries because of the COVID-19 sanitary crisis. No survey data in 2020.

- Despite some minor fluctuations, trust in Radio and TV has remained rather stable during the past five years. Both could increase their ranking compared to 2015.
- The written press has improved its ranking on the trust score, coming from negative levels in 2015.
- Citizens' trust in social networks has declined constantly each year since 2015, and the trust gap between social networks and legacy media has increased.
- Trust in the internet has increased slightly (+4 points) compared to 2019 but still shows lower levels than 2015.

# CITIZENS TRUST LEGACY MEDIA MORE THAN POLITICAL INSTITUTIONS

## TRUST IN MEDIA VS. TRUST IN OTHER INSTITUTIONS (EU Net Trust Index, 2021)



Note: Survey results at EU level represent a weighted average across the 27 EU Member States, applying official population figures provided by EUROSTAT.

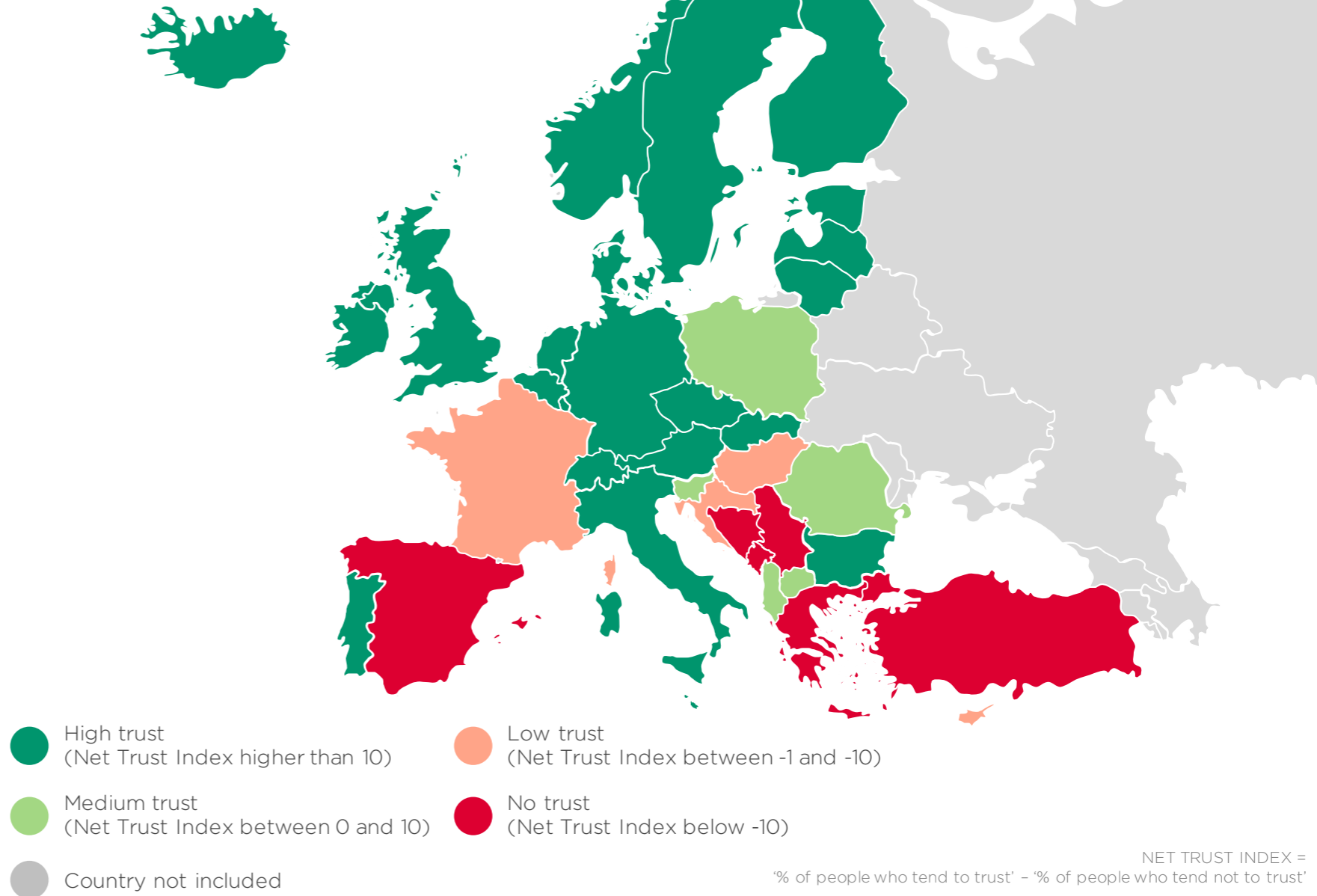
**NET TRUST INDEX =**  
 '% of people who tend to trust' - '% of people who tend not to trust'  
 AVERAGE NET TRUST ACROSS THESE INSTITUTIONS = -1

- Comparisons with citizens' confidence in other institutions puts media trust in perspective: while trust levels for media might appear low at first glance, comparing reveals that legacy media are given higher trust levels than political institutions.
- Amongst the institutions measured, EU citizens only trust their respective national army and police more than radio. TV is on par with the European Union.
- The internet fares slightly better than national governments and parliaments, while only political parties are even less trusted than social networks.

# THREE QUARTERS OF COUNTRIES TRUST THEIR BROADCASTERS

- Average net trust for radio and TV is positive in 27 of the 37 countries covered (73%).
- Countries with negative net trust are mainly to be found around the Mediterranean Sea.

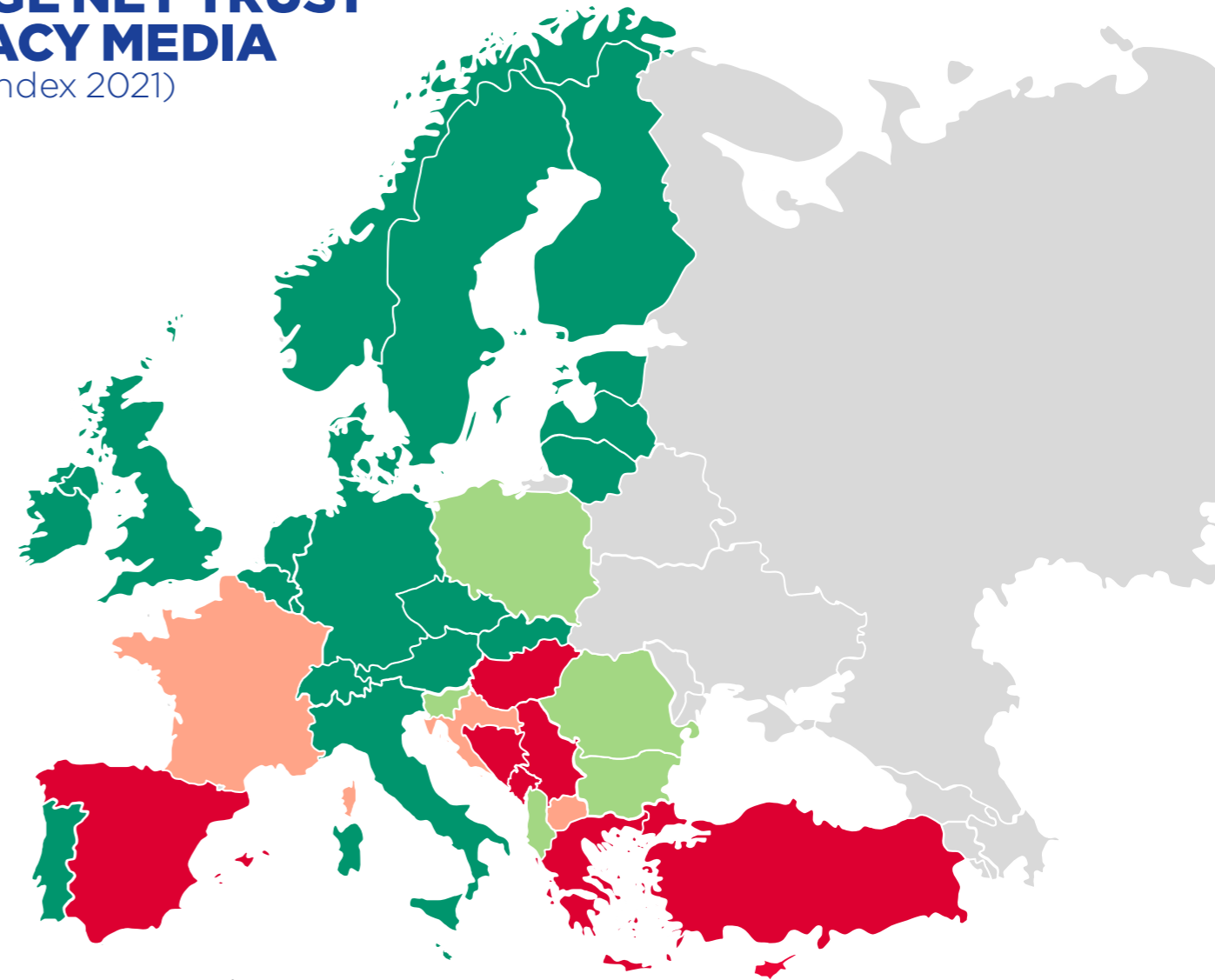
## AVERAGE NET TRUST IN BROADCAST MEDIA (Net Trust Index 2021)



# CITIZENS TRUST LEGACY MEDIA IN 70% OF EUROPE

- Measured as the average of Net Trust indices for radio, TV, and the written press, legacy media are trusted in 26 of the 37 countries (70%).
- Again, trust in legacy media is lowest in Mediterranean and Southeastern Europe.

## AVERAGE NET TRUST IN LEGACY MEDIA (Net Trust Index 2021)

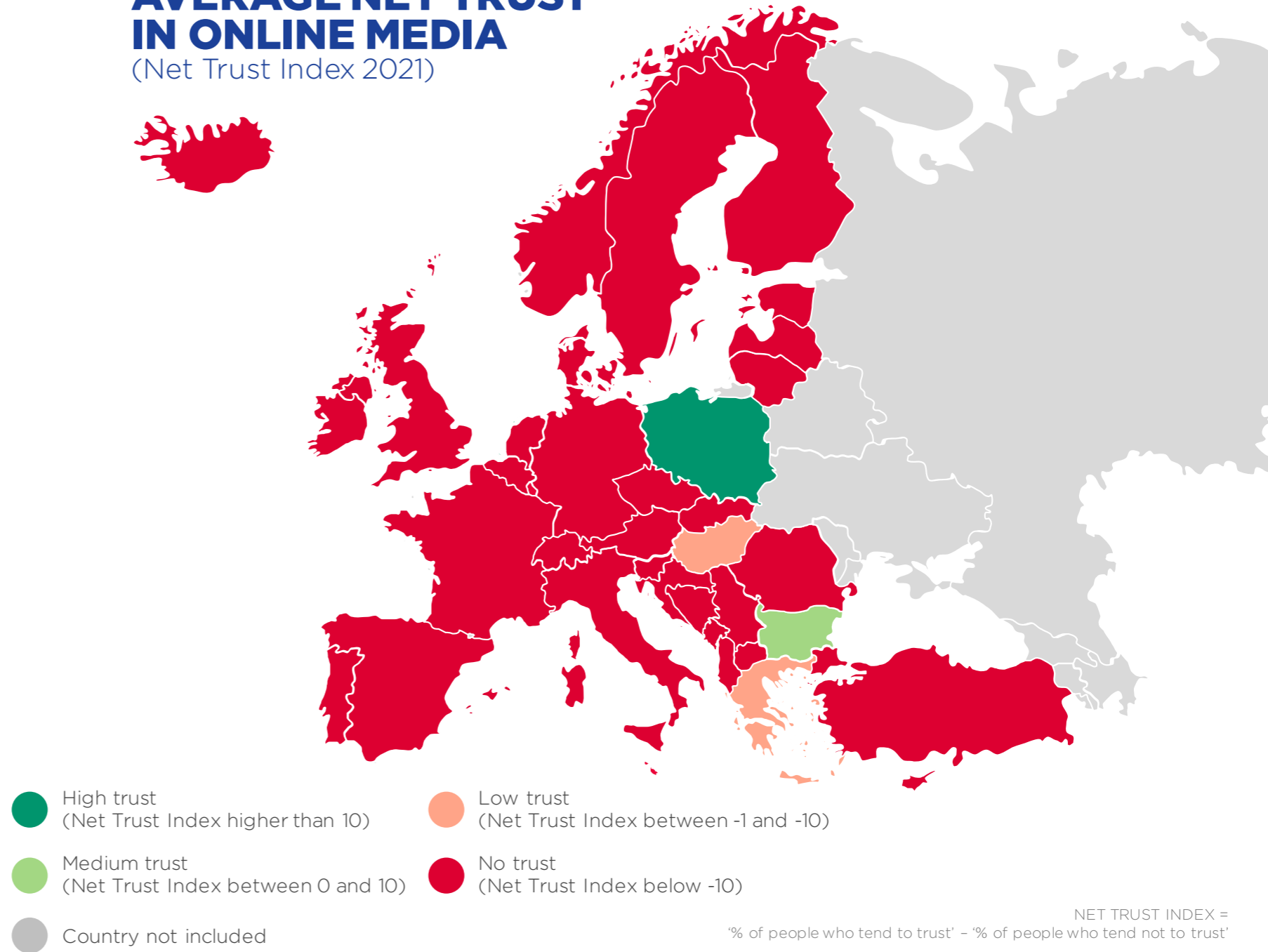


NET TRUST INDEX =  
‘% of people who tend to trust’ - ‘% of people who tend not to trust’

# CITIZENS DO NOT TRUST ONLINE MEDIA IN 95% OF COUNTRIES

- The average Net Trust index for the internet and social networks is negative in 35 of the 37 countries (95%).
- A positive Net Trust value is only to be found in Poland, and, to a very low extent, in Bulgaria.

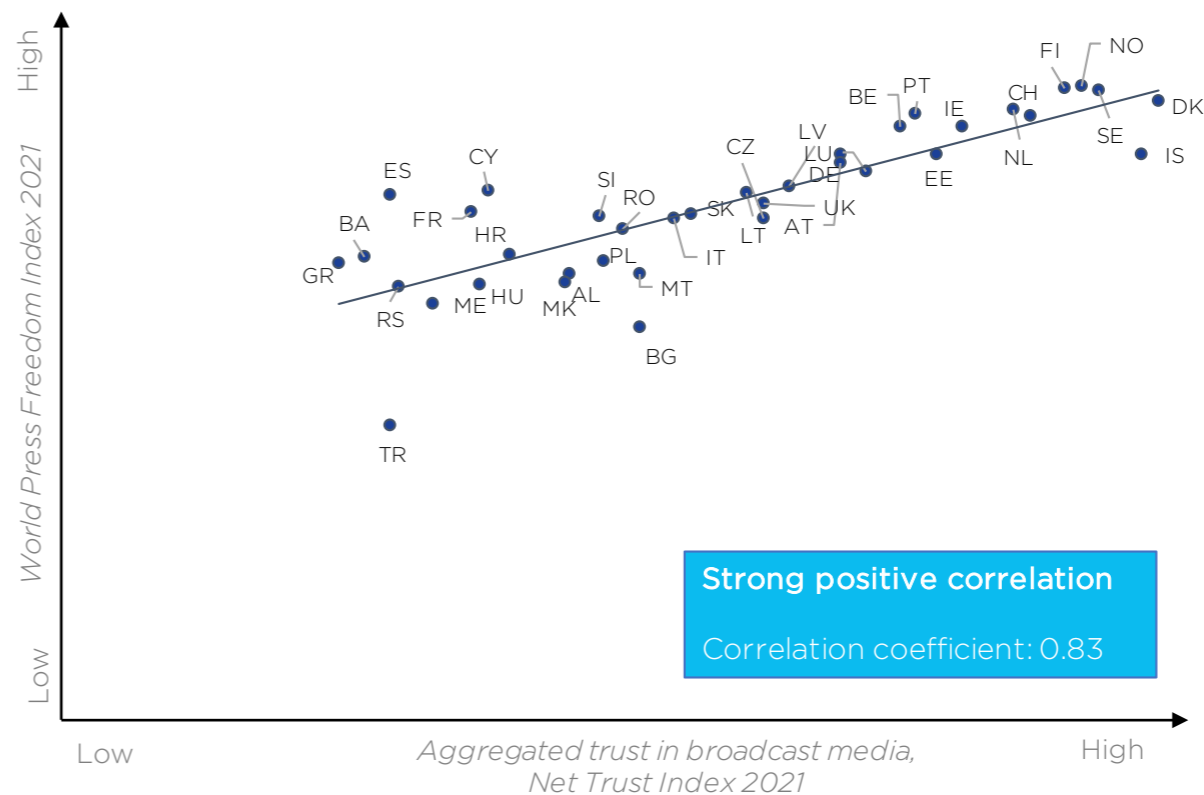
## AVERAGE NET TRUST IN ONLINE MEDIA (Net Trust Index 2021)





# TRUST IN RADIO AND TV GOES ALONG WITH PRESS FREEDOM

## PRESS FREEDOM vs. TRUST IN BROADCAST MEDIA



Note: The aggregated broadcast media trust figure 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 2021 and reflects events of the prior year (2020).

- The higher the level of trust in a country's broadcast media (Net Trust indices of radio and TV summed up), the greater press freedom tends to be in that country.
- This strong correlation suggests that in the European context, citizens' trust in radio and TV is closely linked to a free and independent news media landscape.

# TRUST IN NEWS

# CITIZENS TRUST PSM NEWS MOST IN 16 OF 26 EUROPEAN MARKETS

## MOST TRUSTED NEWS BRANDS (2021)



- PSM news are the most trusted news brands in 62% of European markets covered. In an additional 3 markets, PSM are among the 5 most trusted brands.
- In many markets, several PSM news brands appear in the top 5 – e.g., different PSM radio and TV brands. In Bulgaria, Czech Republic, Germany, and Sweden, PSM brands occupy both ranks 1 and 2.
- Geographically, trust in PSM news brands is highest in the Nordics, Benelux states, Central Europe, the UK and Ireland as well as Bulgaria and Portugal.

# EUROPEAN CITIZENS TEND TO TRUST PSM NEWS THE MOST

## MOST TRUSTED PSM NEWS BRANDS (2021)

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

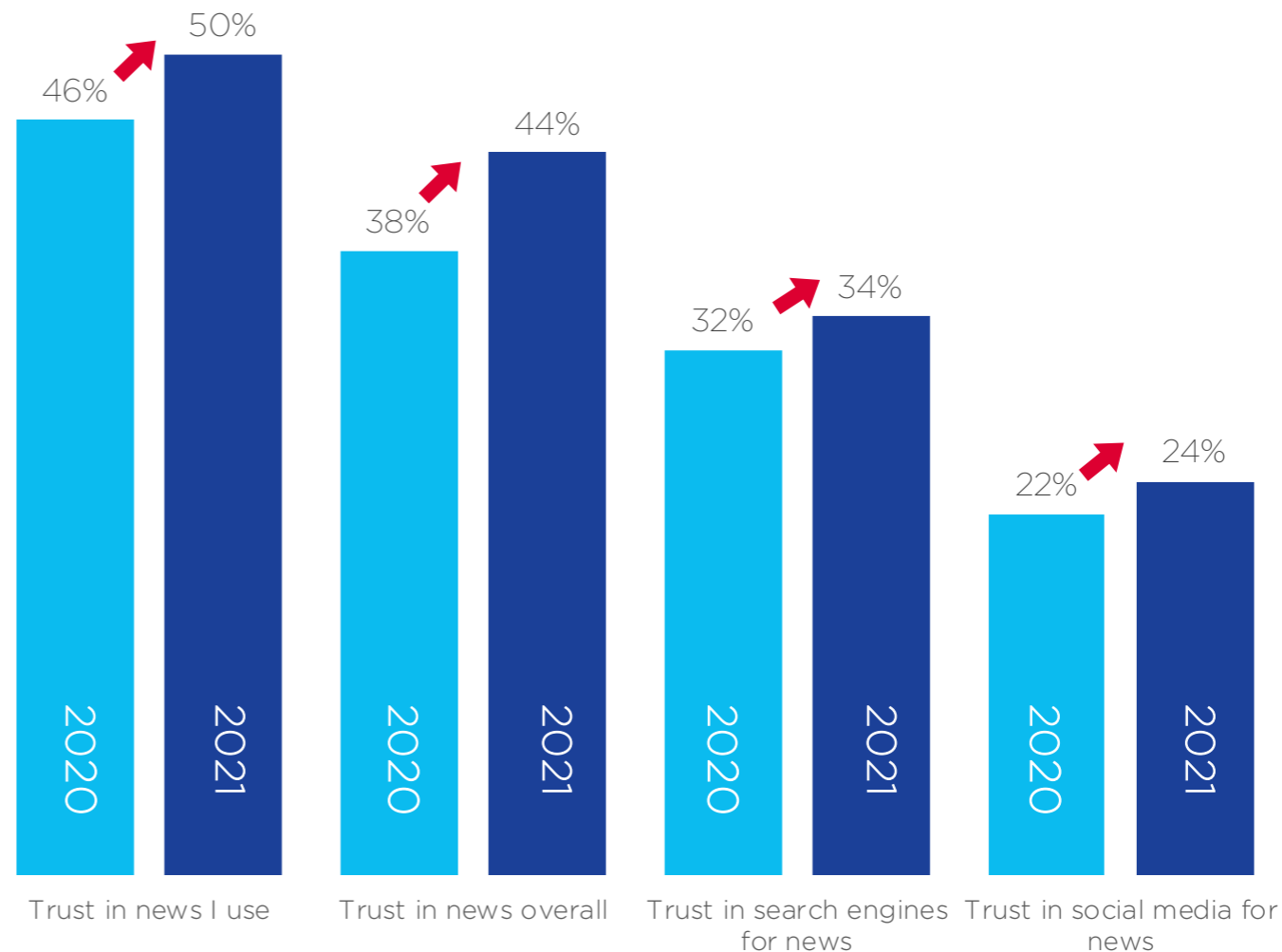
Market	PSM Brand	Rank	Market	PSM Brand	Rank
■ Austria	ORF News	1	■ Switzerland DE	SRF News	1
■ Belgium FL	VRT Nieuws	1	■ Switzerland FR	RTS News	1
■ Belgium FR	RTBF News	1	■ UK	BBC News	1
■ Bulgaria	BNR	1	■ France	France TV	2
■ Czech Republic CT		1	■ Slovakia	RTVS	2
■ Denmark	DR News	1	■ Greece	ERT News	3
■ Finland	Yle News	1	■ Spain	RTVE	4
■ Germany	ARD Tagesschau	1	■ Romania	Radio Romania	4
■ Ireland	RTÉ News	1	■ Croatia	HTV News	7
■ Netherlands	NOS News	1	■ Italy	RAI News	7
■ Norway	NRK News	1	■ Turkey	TRT News	7
■ Portugal	RTP News	1	■ Hungary	MTV	13
■ Sweden	SVT Nyheter	1	■ Poland	TVP News	15

Note: Based on the question “How trustworthy would you say news from the following brands is?”, List of brands includes national broadcasters, print and digital outlets.

- Citizens turn to PSM for trusted news and credible information in a majority of European markets.
- In many markets, PSM stably score at the top of the most trusted news brands list compiled by Reuters Institute for the Study of Journalism. Only in Hungary and Poland no PSM brand is found among the ten most trusted news brands.
- ERT News (Greece) has experienced a notable rise from rank 9 of the list in 2020 to rank 3 in 2021.

# SEARCH AND SOCIAL PLATFORMS ARE LITTLE TRUSTED NEWS SOURCES

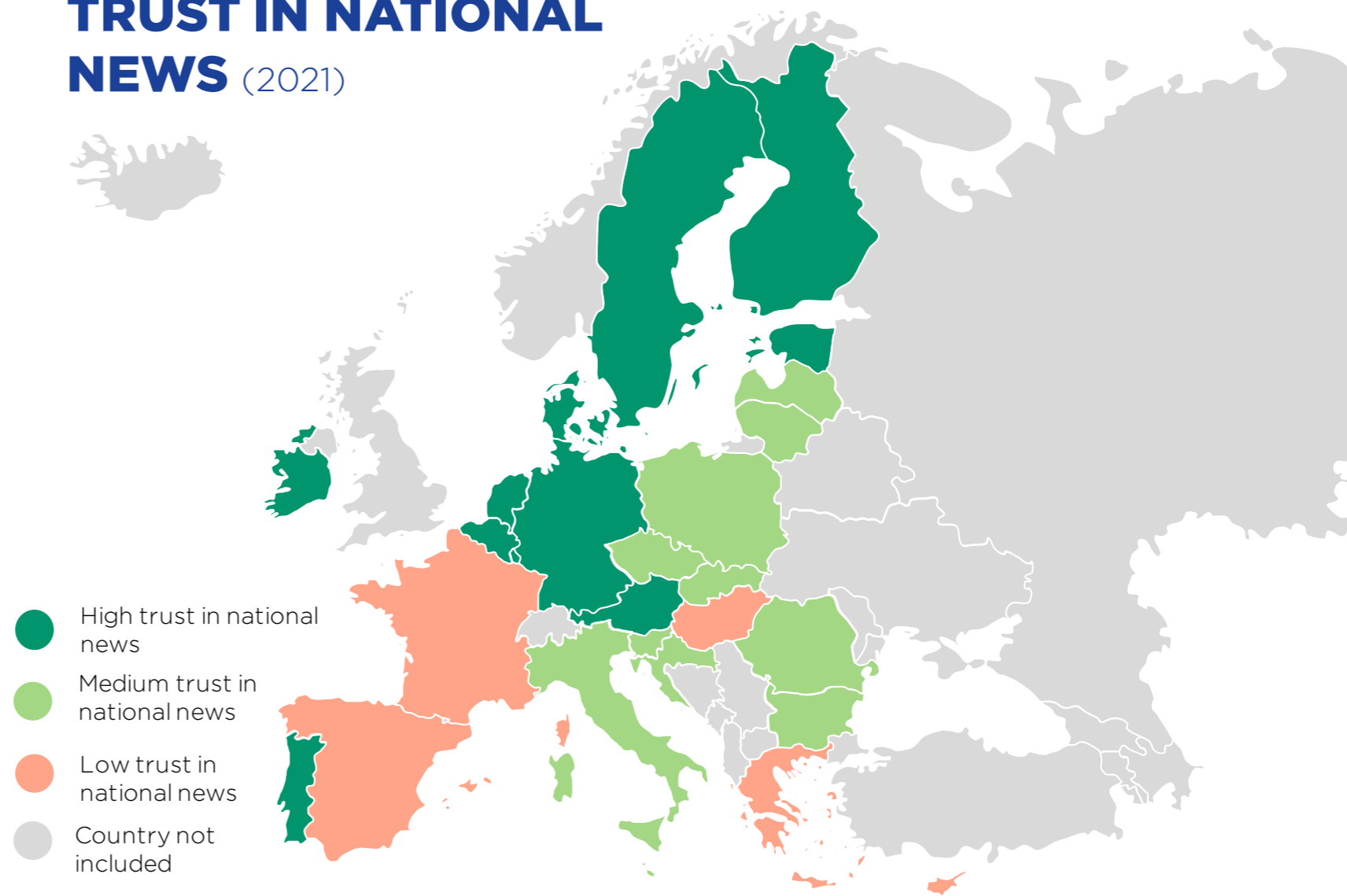
## TRUST IN NEWS WORLDWIDE



- Globally seen, trust in news is increasing: Overall trust in news is up by 6 percentage points compared to 2020. Trust in the news sources people themselves use is up by 4 percentage points, now ranking at 50%, returning to the levels of 2018.
- At the same time, the trust gap is growing between news found through search engines or social media on the one hand and news overall or news people use on the other hand, even if trust in search engines and social media as news providers increased slightly, too (+2 percentage points each).

# TRUST IN NATIONAL NEWS IS HIGHEST IN THE NORDICS

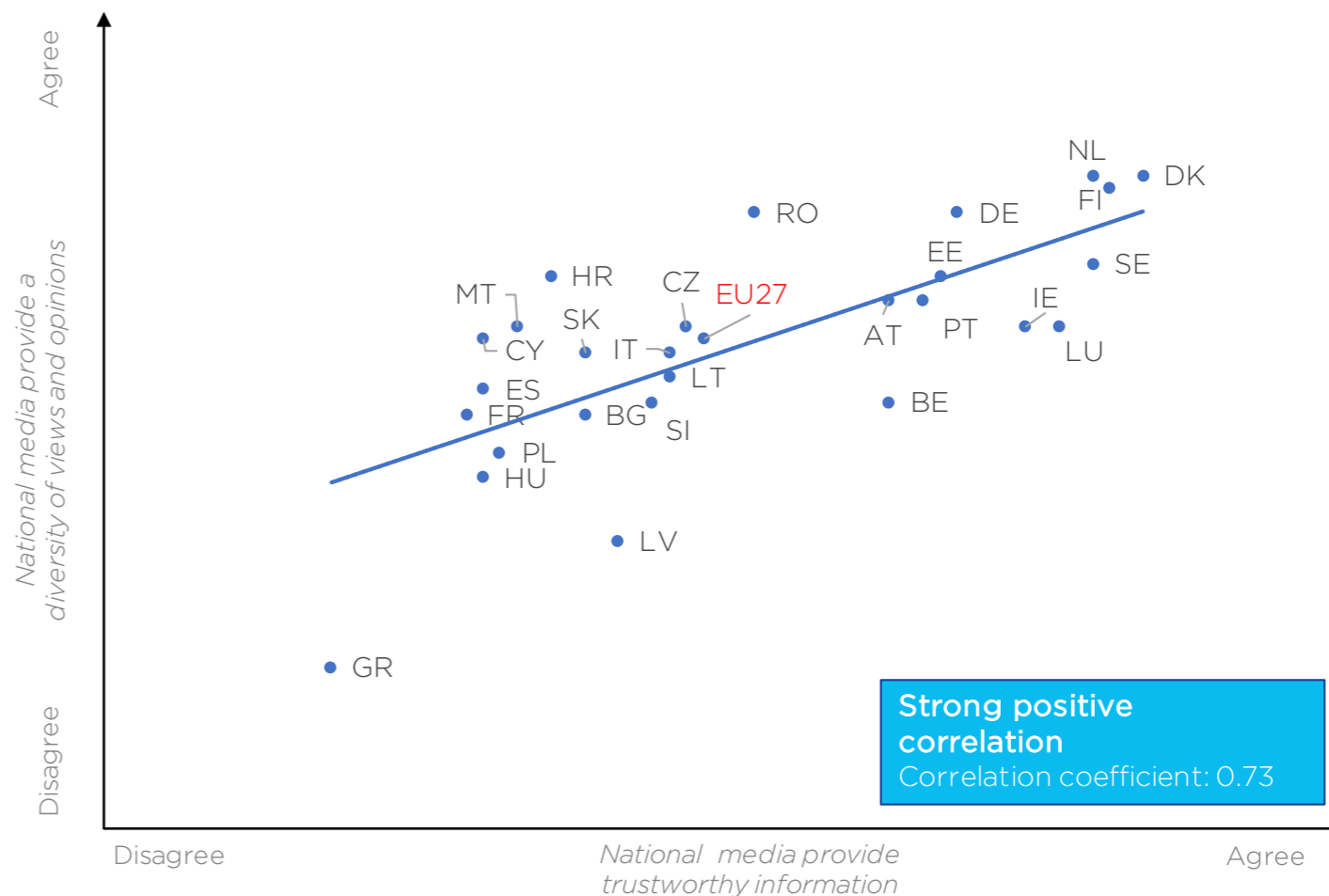
## TRUST IN NATIONAL NEWS (2021)



- 21 out of the 27 EU states (75%) show a medium or high level of trust in national media, meaning that at least half of their population agrees that their national media provide trustworthy information.
- Notably, 2 of the “Big 4” EU markets have low levels of trust in the information provided by national media: Spain and France. Trust in the information provided by national media is also rather low in Hungary, Greece, and Cyprus.

# TRUST IN NEWS GOES ALONG WITH A PERCEIVED DIVERSITY OF VIEWS

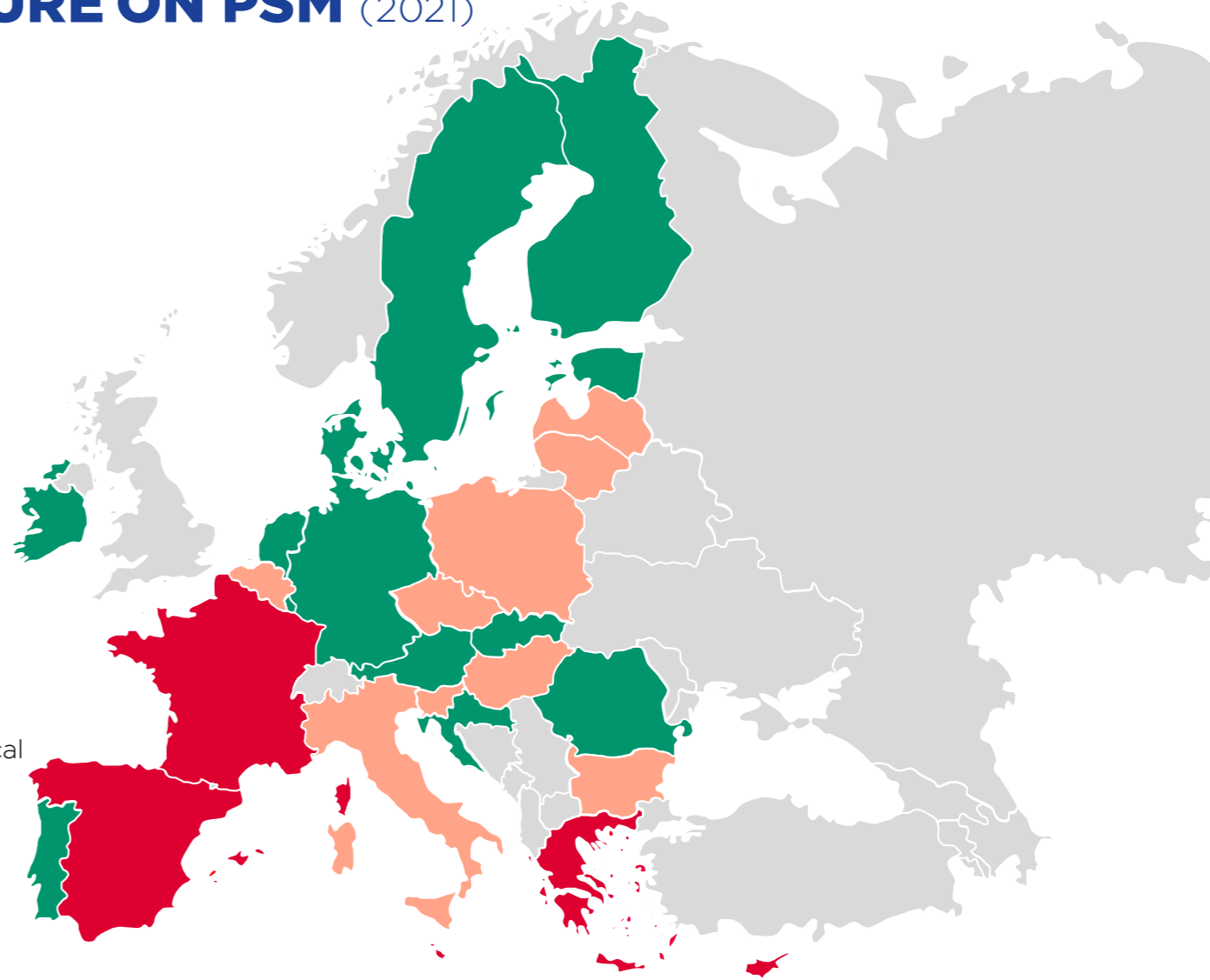
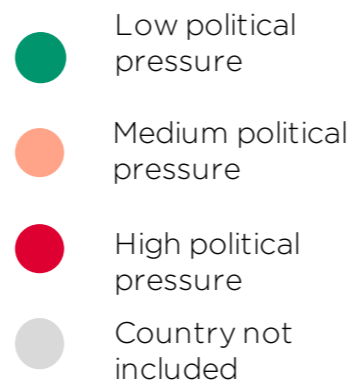
## TRUST IN NATIONAL NEWS vs. DIVERSITY OF OPINIONS IN NEWS COVERAGE



- The more citizens perceive their national media to provide trustworthy information, the more they are convinced that these cover a diversity of views and opinion. This may signify that citizens value a media landscape that they perceive as fair, balanced and diverse.
- However, in only one EU country, Greece, more than half the population think that their media do not provide diverse views and opinions.

# PERCEIVED PRESSURE ON PSM IS HIGHEST IN THE MEDITERRANEAN

## PRESSURE ON PSM (2021)

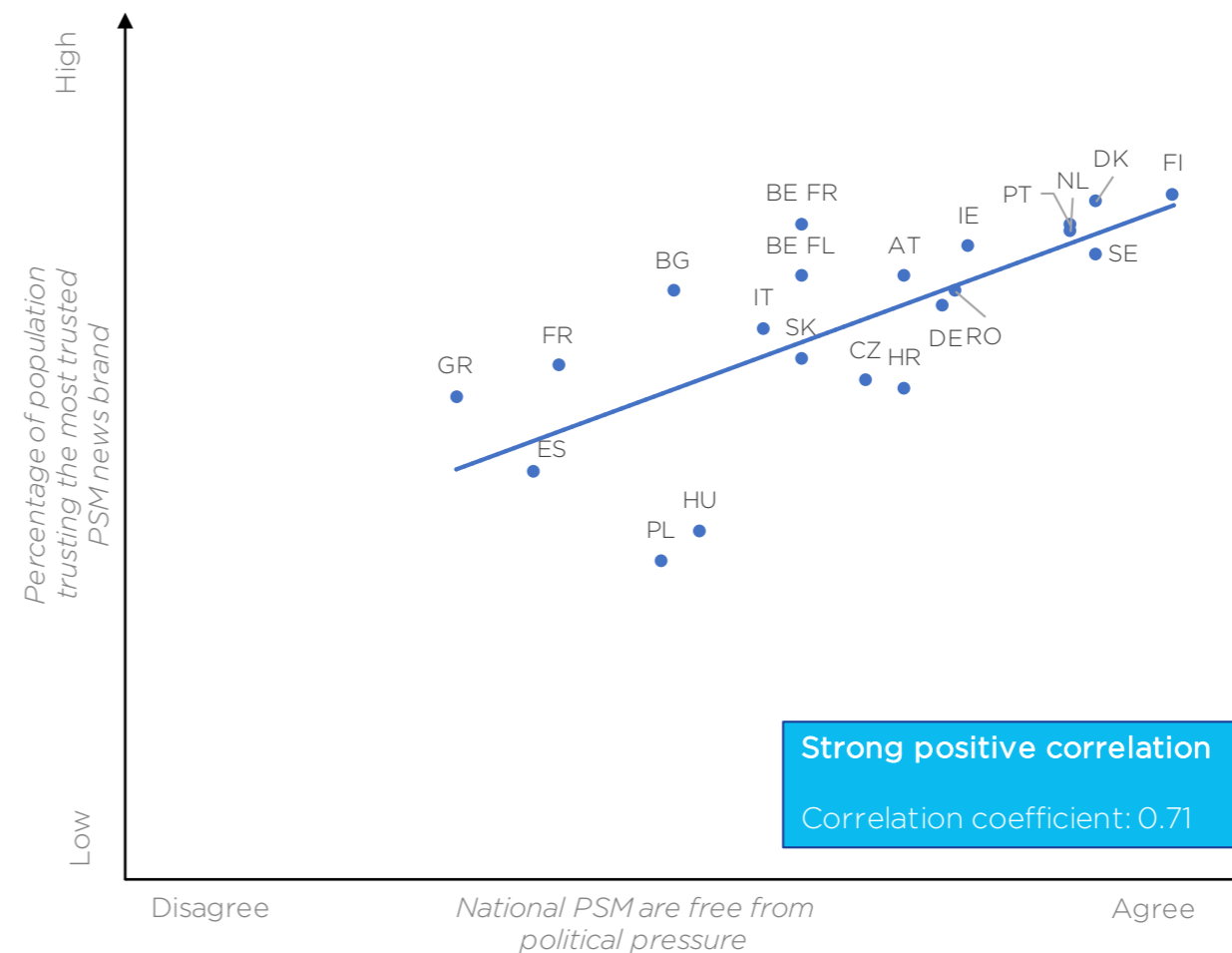


- In 12 out of the 27 EU member states (44%), a majority is convinced that their national PSM are rather free from political pressure, with this perception being most widespread in the Nordic countries as well as the Netherlands and Portugal.
- In 11 countries (41%) a medium degree of perceived pressure can be observed, whereas in five countries (19%) citizens think that their PSM are under high political pressure, all of which are in the Mediterranean: Malta, France, Cyprus, Spain, and Greece.



# LOW PRESSURE ON PSM GOES ALONG WITH HIGHER TRUST IN PSM NEWS

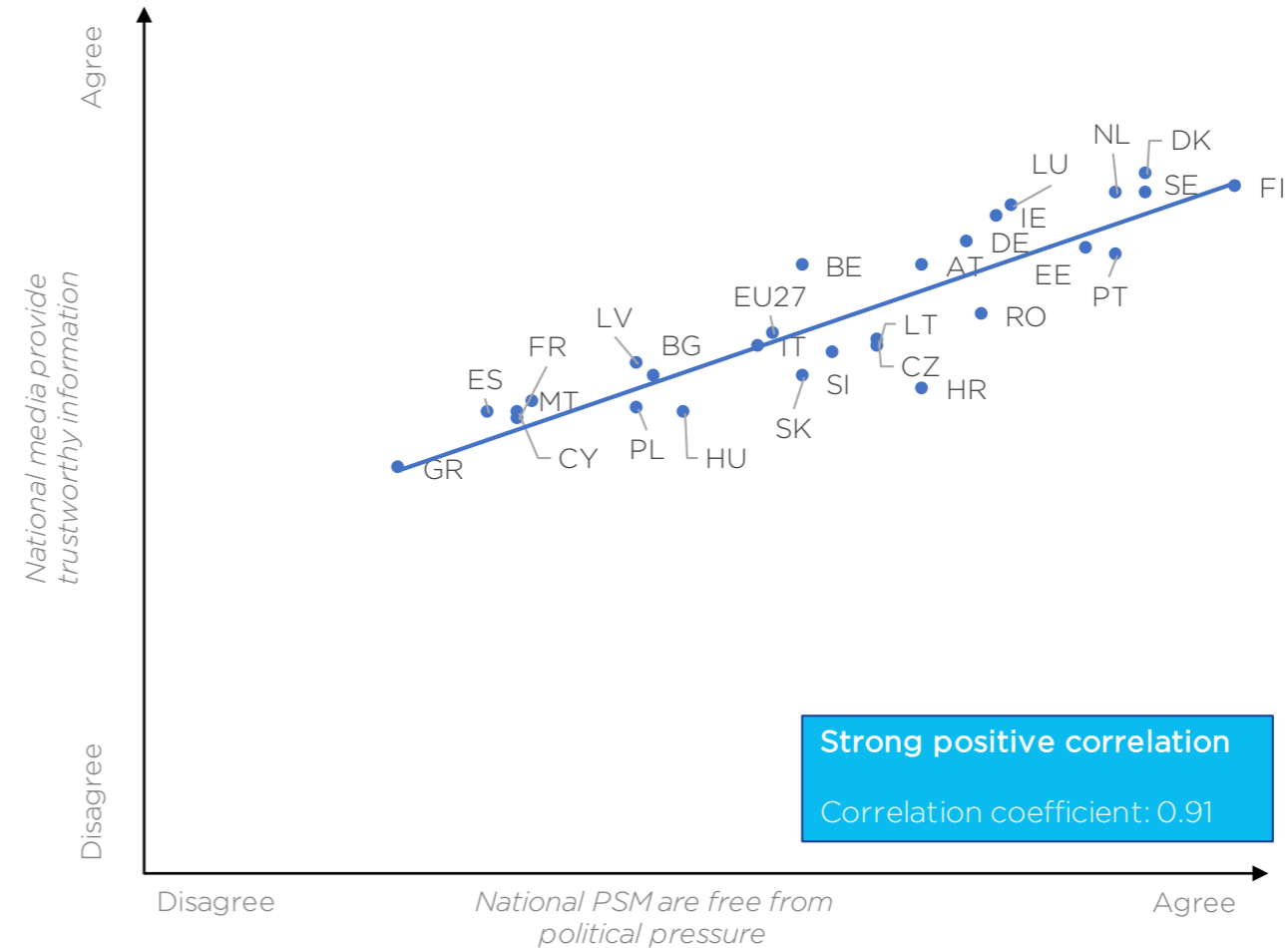
## PERCEIVED INDEPENDENCE OF NATIONAL PSM vs. TRUST IN TOP PSM NEWS BRAND



- The more citizens perceive their national PSM to be free from political pressure, the higher the levels of trust expressed in the most trusted PSM news brand within the country.
- Consequently, if citizens regard their PSM as rather independent from politics, this may contribute to higher trust in PSM news coverage.

# INDEPENDENT PSM GO HAND IN HAND WITH TRUST IN NATIONAL NEWS

## POLITICAL PRESSURE ON NATIONAL PSM vs. TRUST IN NATIONAL NEWS



- The more PSM are perceived to be free from political pressure by citizens, the higher the level of trust in the information provided by national media in general. Thus, sound and independent PSM may help to sustain a trusted national news media landscape, to the benefit of competitors as well.
- Citizens in North and Central Europe generally perceive lower political pressure on their PSM and tend to put more trust in national news, while the opposite is the case in many Southern countries.

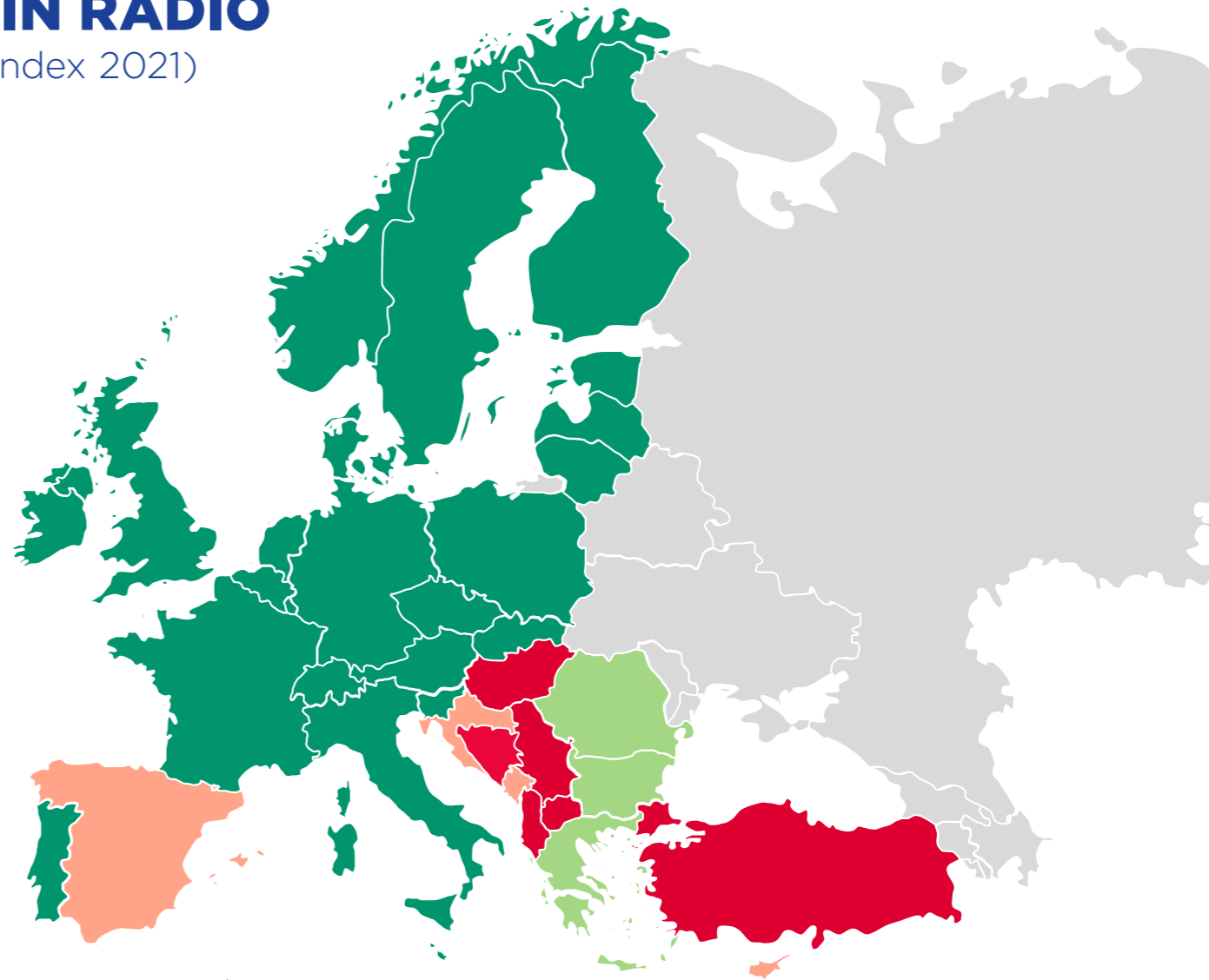
# TRUST IN RADIO

# CITIZENS TRUST RADIO IN 70% OF EUROPEAN COUNTRIES

- A large majority of European countries surveyed (26 out of 37) tend to trust radio, 23 of which with a Net Trust index above 10.
- Negative Net Trust values can be found in several South-Eastern countries as well as Spain.

## TRUST IN RADIO

(Net Trust Index 2021)



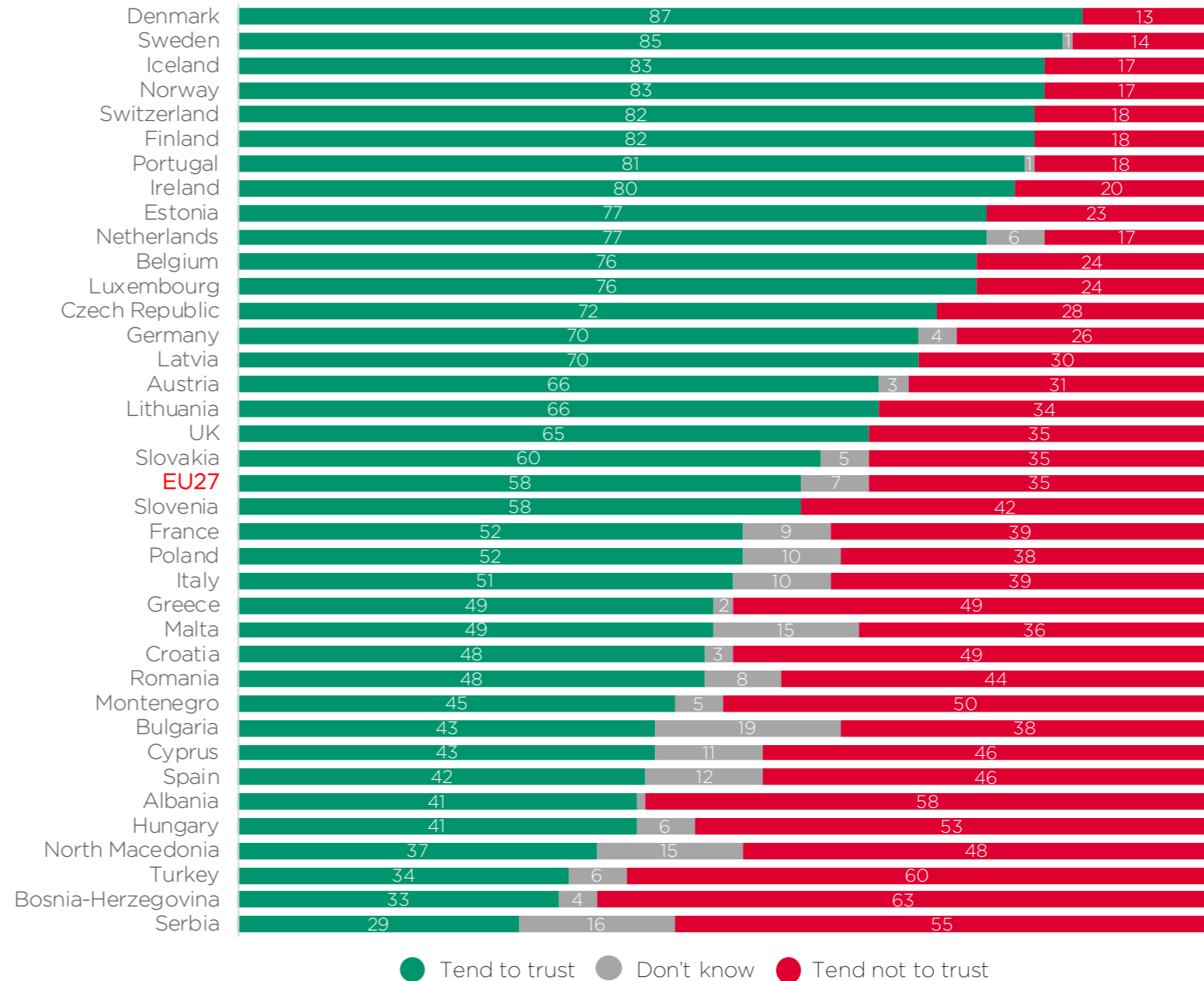
NET TRUST INDEX =  
"% of people who tend to trust" - "% of people who tend not to trust"

# TRUST IN RADIO IS HIGHEST IN NORTHERN AND CENTRAL EUROPE

- In 12 countries, more than 75% of the population tend to trust radio.
- In only 6 countries, more than half of the population say they don't trust radio.

## TRUST IN RADIO

(% of population 2021)

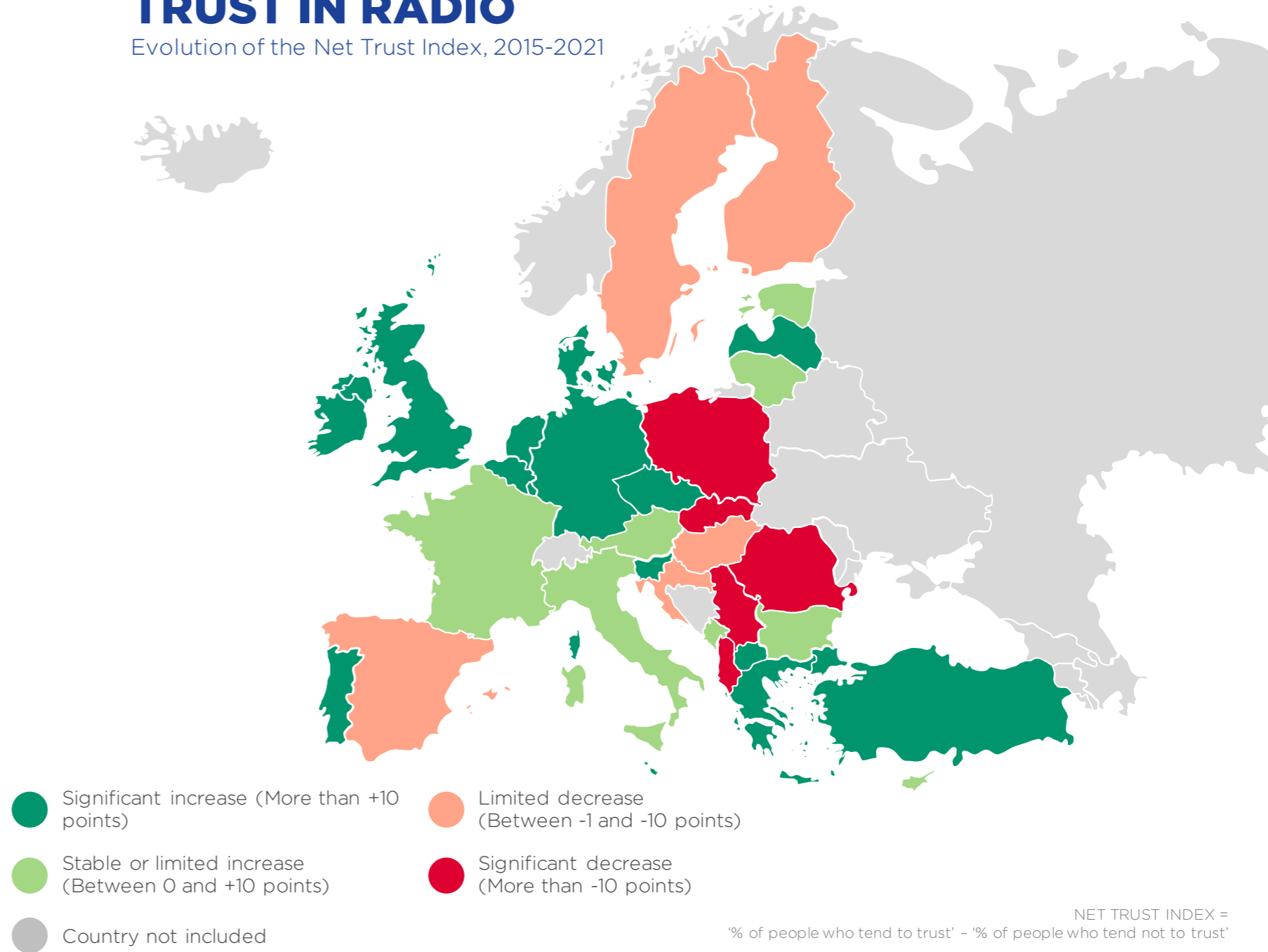


# TRUST IN RADIO HAS INCREASED IN TWO-THIRDS OF COUNTRIES

- Citizens put more trust in radio in 21 of the countries already covered in the 2015 survey.
- Significant decreases can be seen in several Eastern European countries such as Albania (-33 points) or Poland (-21 points).

## TRUST IN RADIO

Evolution of the Net Trust Index, 2015-2021



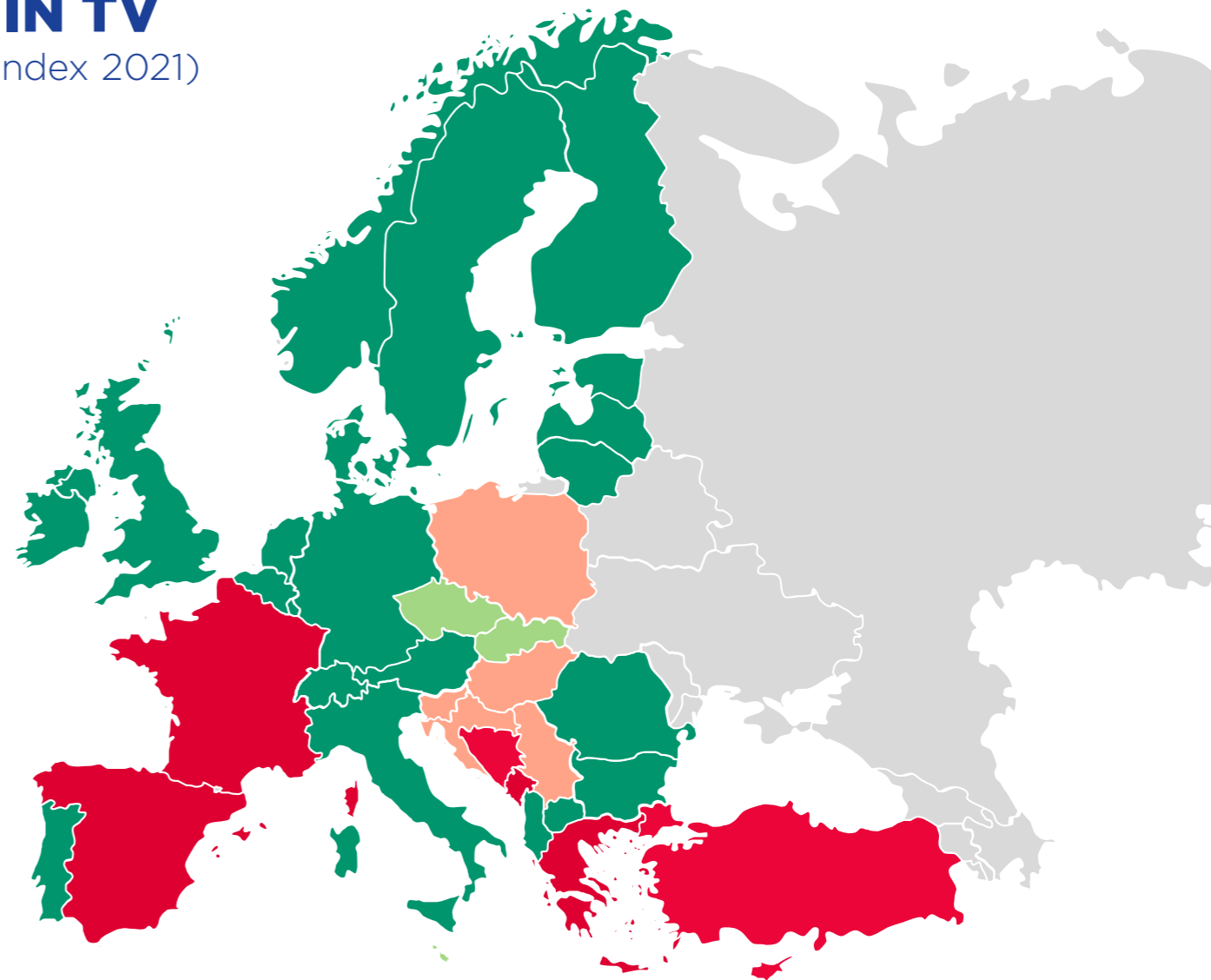
# TRUST IN TV

# TV IS TRUSTED IN ALMOST 70% OF EUROPE

- 25 of the 37 countries covered (68%) trust TV.
- Countries which do not trust TV are to be found around the Mediterranean as well as in Eastern Europe. Trust is significantly low in France, Greece, and Spain.

## TRUST IN TV

(Net Trust Index 2021)



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

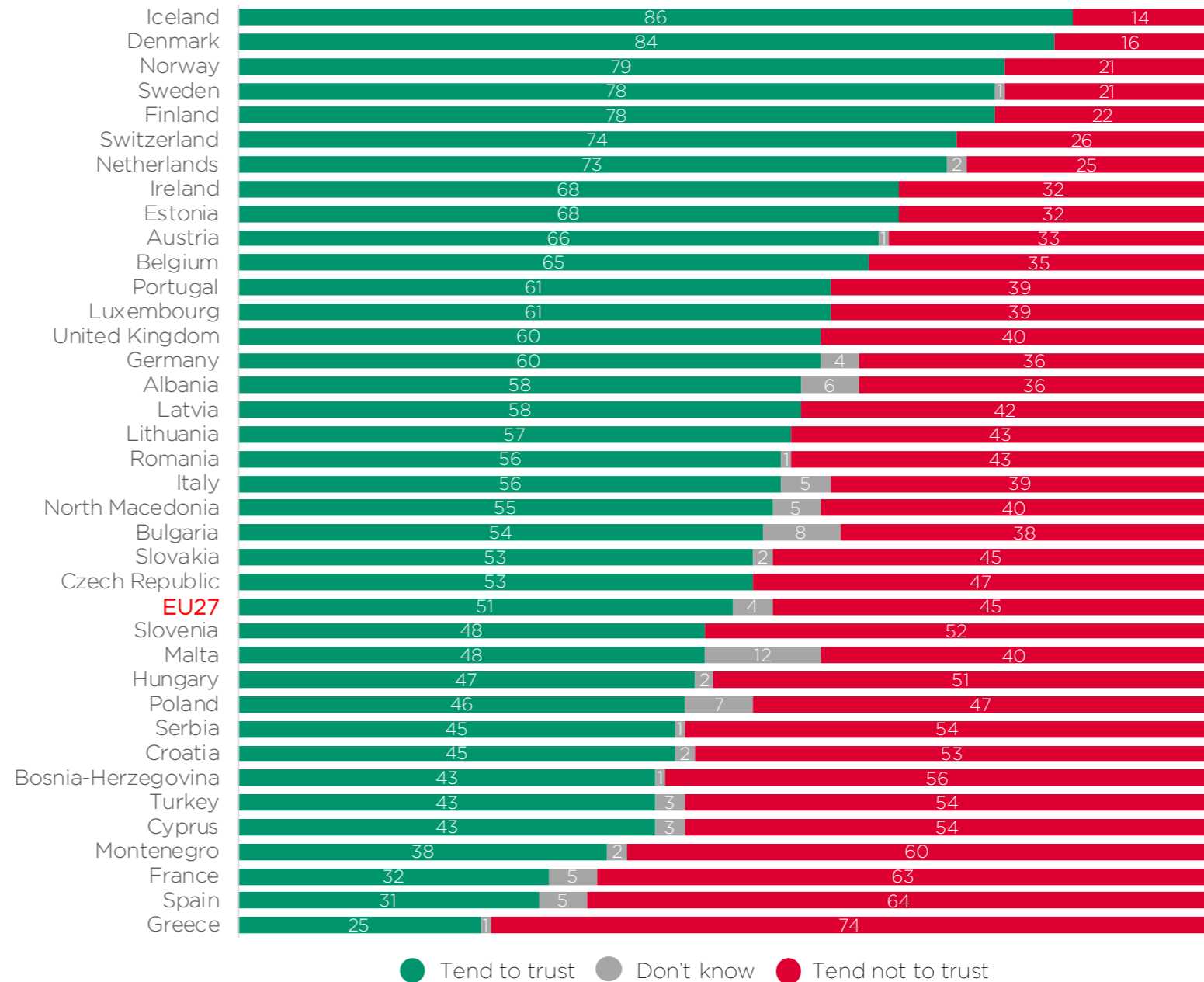


# TRUST IN TV IS HIGHEST IN THE NORDICS

- In the Nordic Countries as well as in Switzerland and the Netherlands, more than 70% of citizens tend to trust TV.
- By contrast, in France, Greece, and Spain, more than 60% of citizens tend not to trust it.

## TRUST IN TV

(% of population 2021)

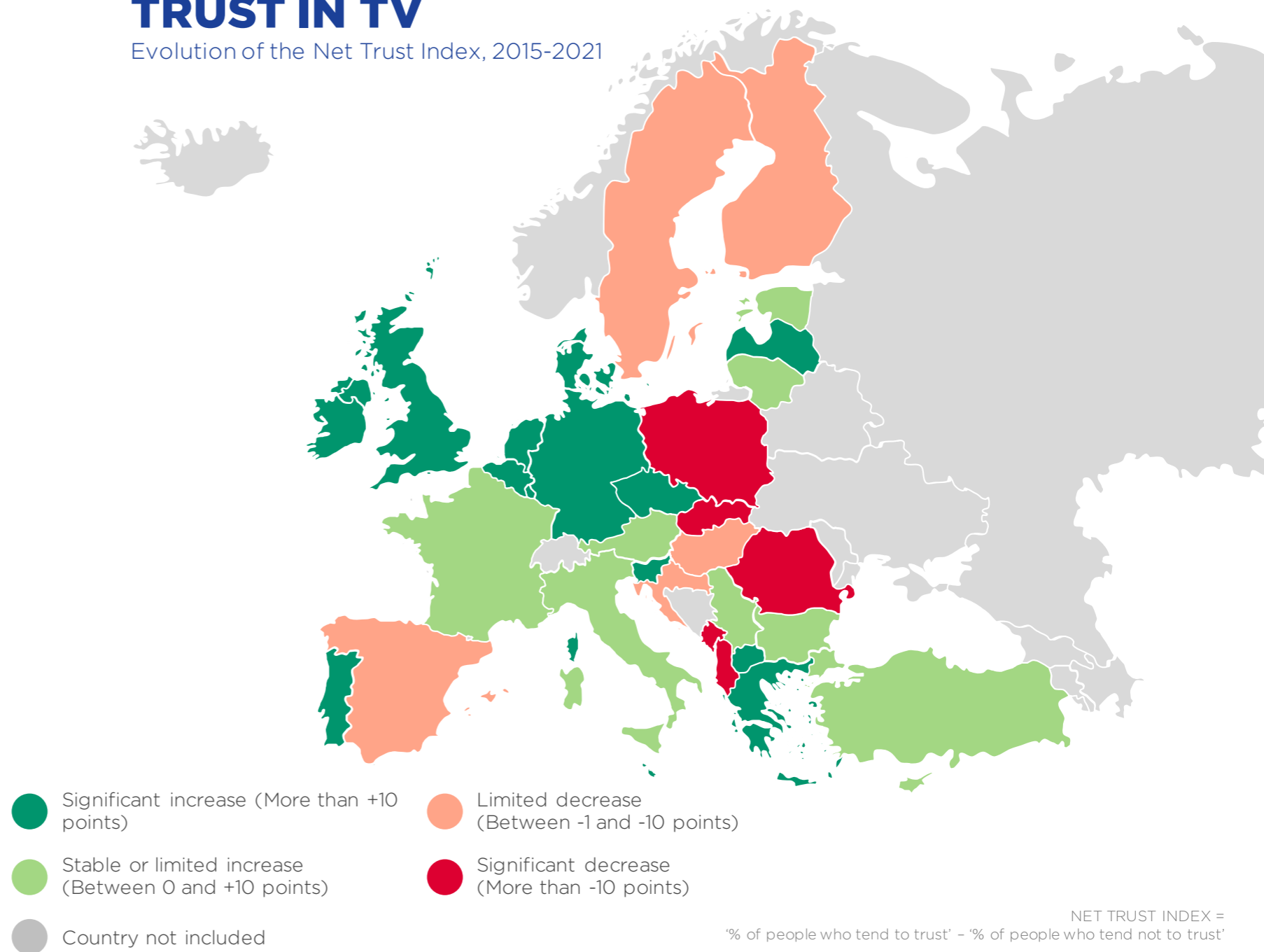


# TRUST IN TV SHOWS A POSITIVE TREND IN MOST COUNTRIES

- In 19 of the 33 countries already covered in 2015 (58%), trust in TV has increased since then.
- By contrast, trust has decreased in 14 countries, most markedly in Albania, Poland, and Slovakia.

## TRUST IN TV

Evolution of the Net Trust Index, 2015-2021



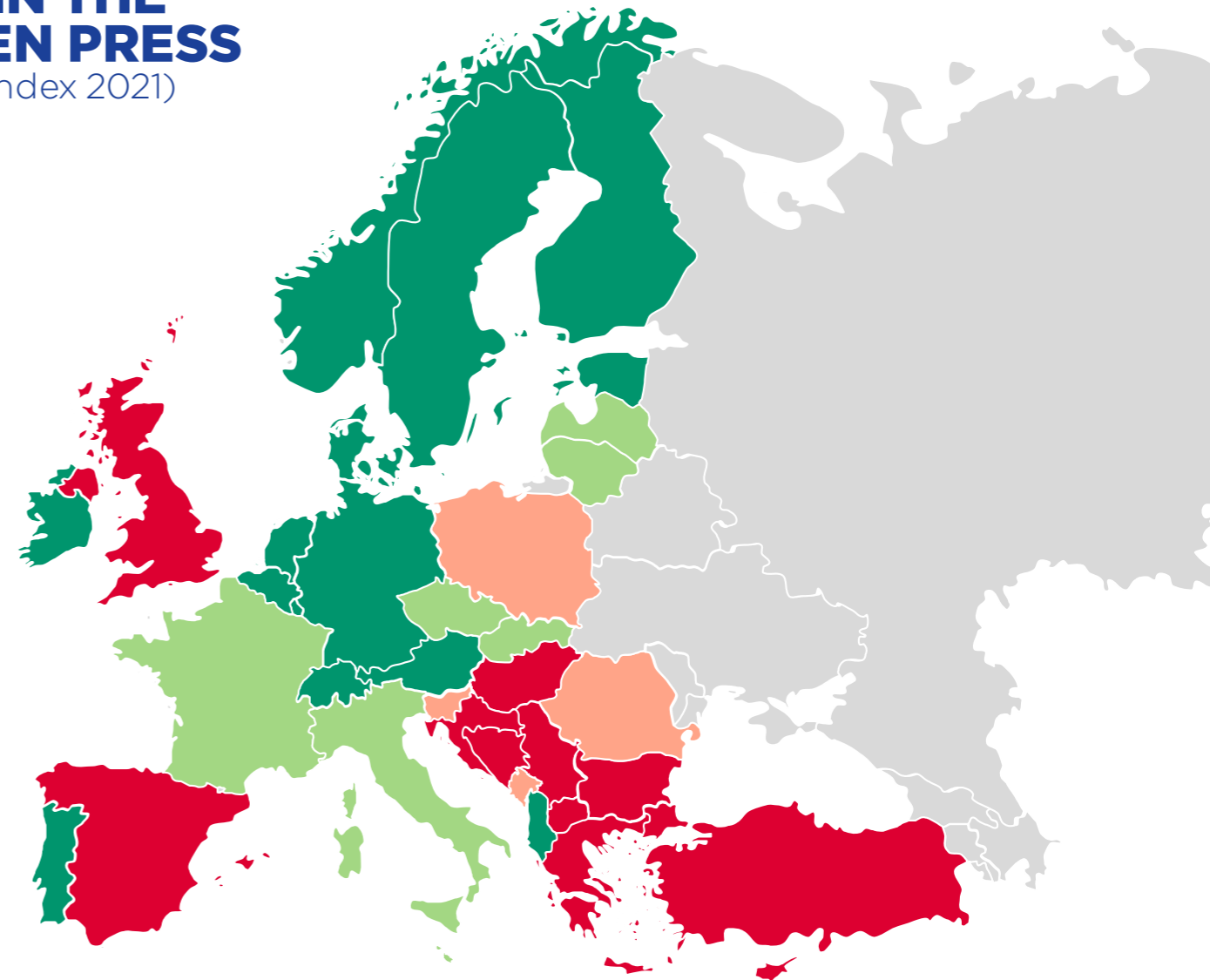
# TRUST IN THE WRITTEN PRESS

# 60% OF EUROPEAN COUNTRIES TRUST THE WRITTEN PRESS

- In 22 of the 37 countries, the written press receives a positive Net Trust value.
- Yet trust levels are negative in almost all of Southeastern Europe except Albania, as well as in Spain and the UK.

## TRUST IN THE WRITTEN PRESS

(Net Trust Index 2021)



● High trust  
(Net Trust Index higher than 10)

● Low trust  
(Net Trust Index between -1 and -10)

● Medium trust  
(Net Trust Index between 0 and 10)

● No trust  
(Net Trust Index below -10)

● Country not included

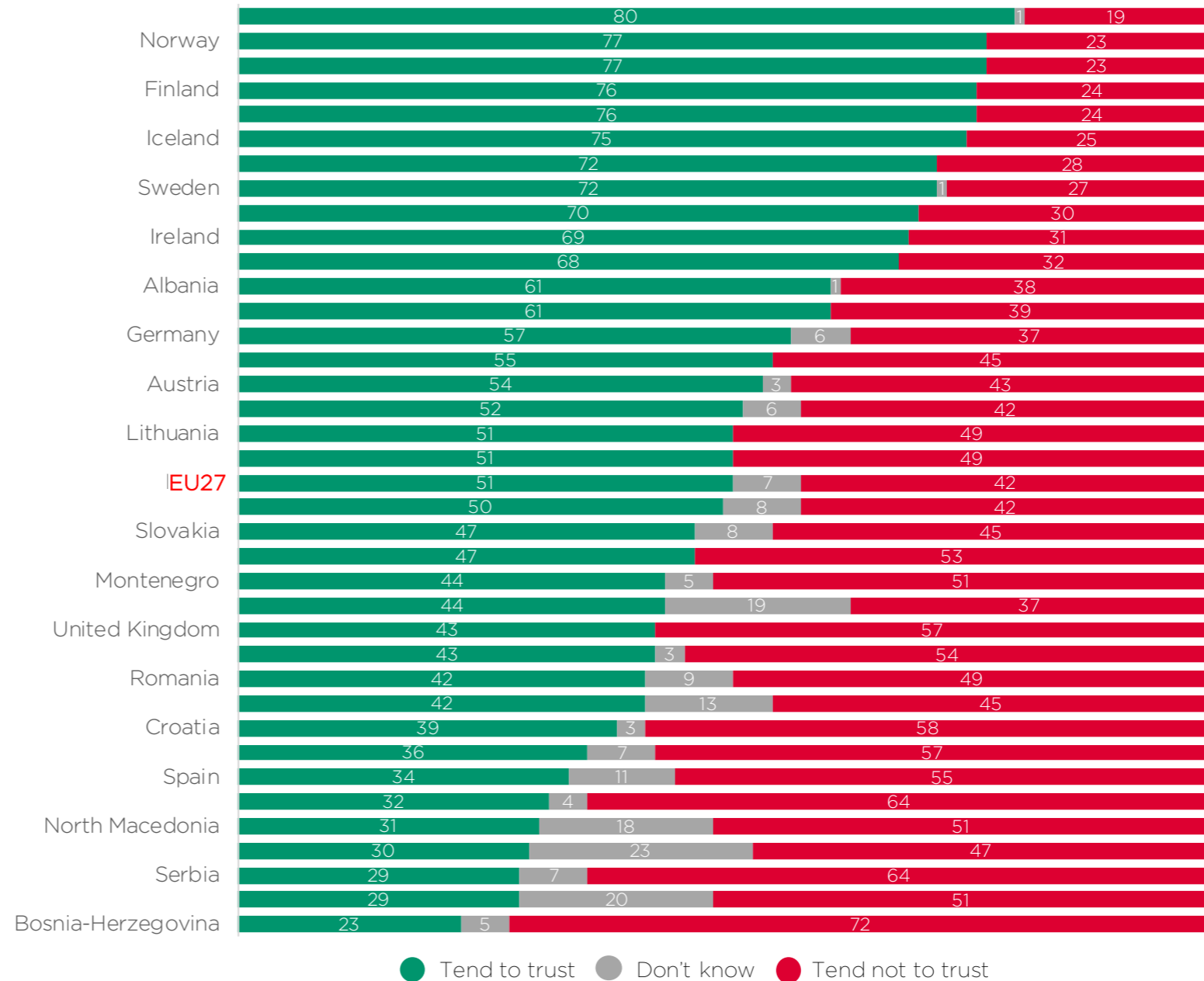
NET TRUST INDEX =  
'% of people who tend to trust' - '% of people who tend not to trust'

# TRUST IN THE WRITTEN PRESS IS LOWEST IN SOUTHEASTERN EUROPE

- Trust in the written press is highest in the Nordics and Benelux states.
- Several Southeastern European states feature at the bottom end, with less than 30% of citizens showing trust in Cyprus, Serbia, and Bosnia-Herzegovina.

## TRUST IN THE WRITTEN PRESS

(% of population 2021)

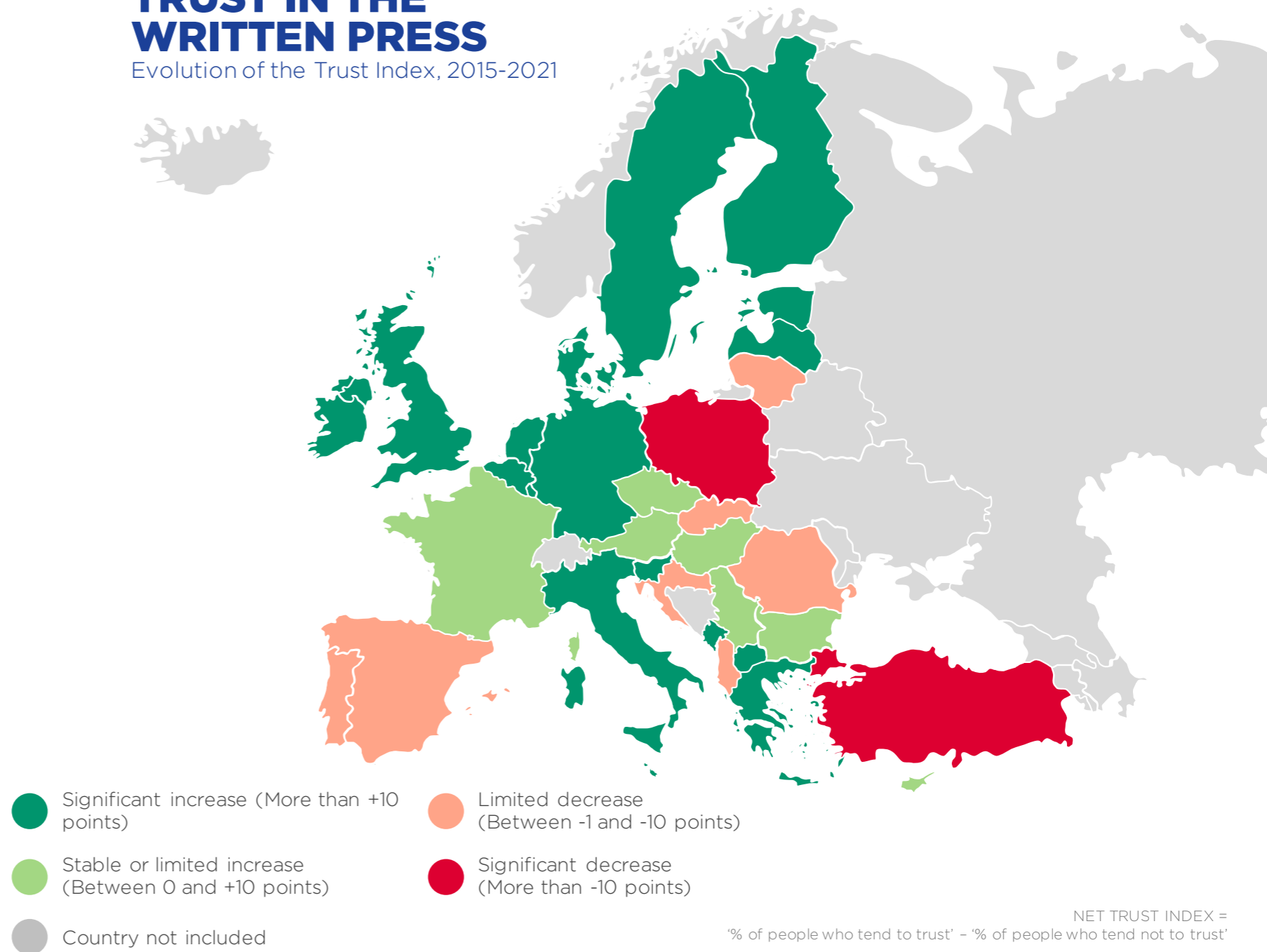


# TRUST IN THE PRESS IS UP IN ALMOST 75% OF COUNTRIES

- Citizens put more trust in the written press compared to 2015 in 24 of the 33 countries already covered in that year.
- By contrast, trust has decreased significantly in Poland and Turkey.

## TRUST IN THE WRITTEN PRESS

Evolution of the Trust Index, 2015-2021



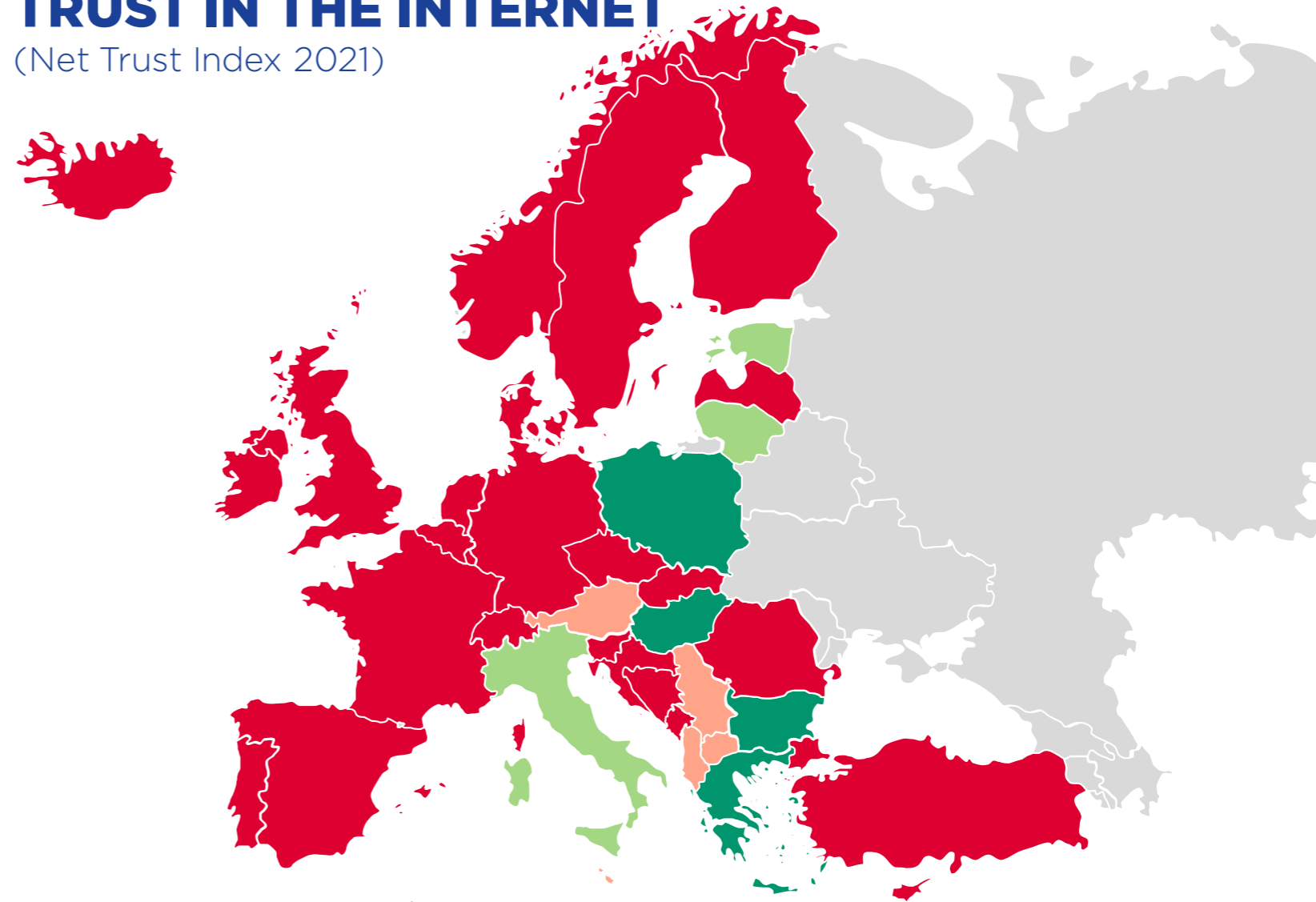
# TRUST IN THE INTERNET

# CITIZENS DO NOT TRUST THE INTERNET IN 30 COUNTRIES

- The internet receives negative Net Trust values in 30 of 37 countries (81%).
- Net Trust is positive in seven countries, mainly located in Eastern Europe, with highest Net Trust values observed in Poland, Greece and Hungary.

## TRUST IN THE INTERNET

(Net Trust Index 2021)



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

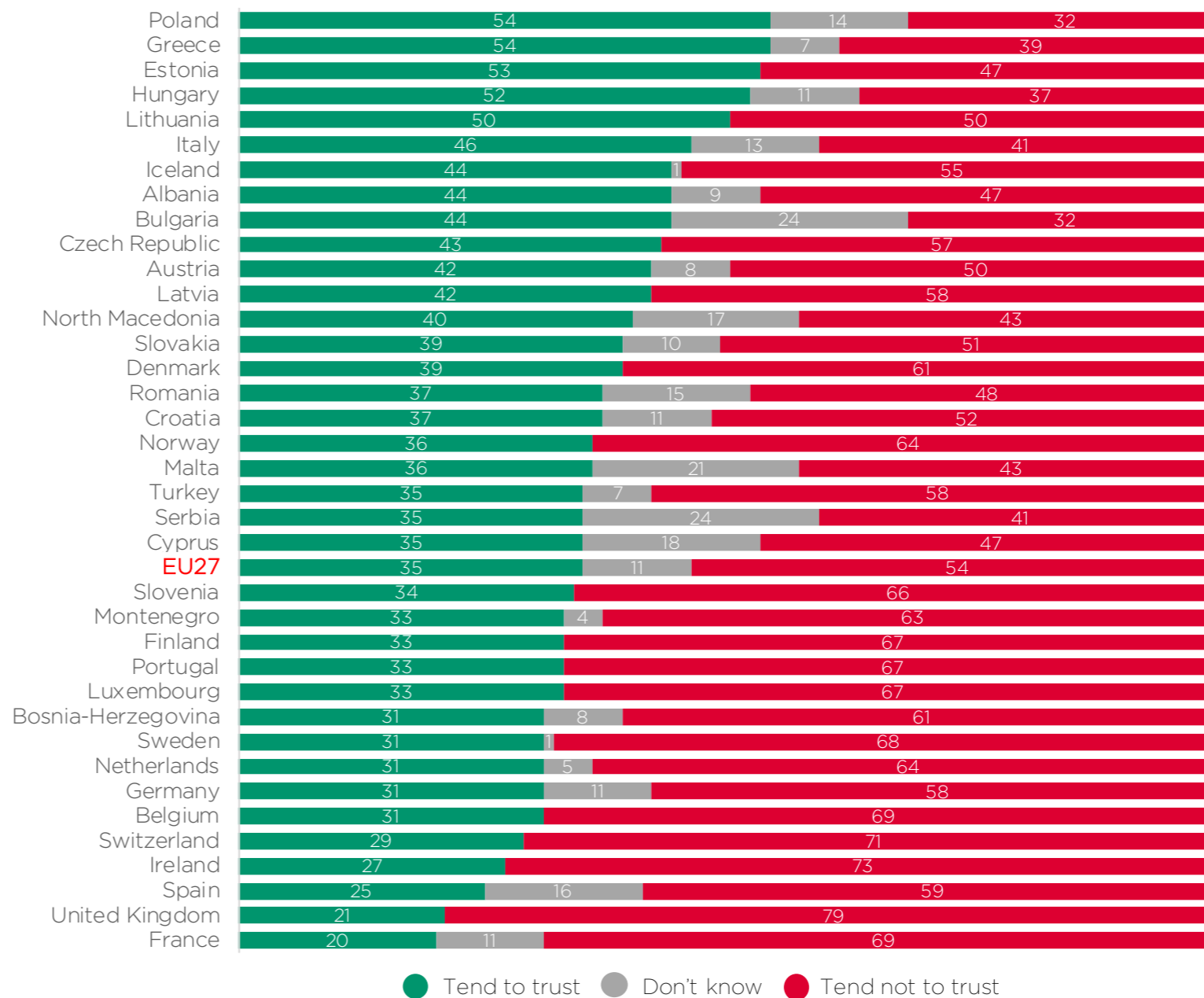


# EASTERN EUROPEANS TEND TO TRUST THE INTERNET THE MOST

- Trust in the internet is highest (>50% of population tend to trust) in several Eastern European countries. However, the geographical divide is less clear-cut here.

## TRUST IN THE INTERNET

(% of population 2021)

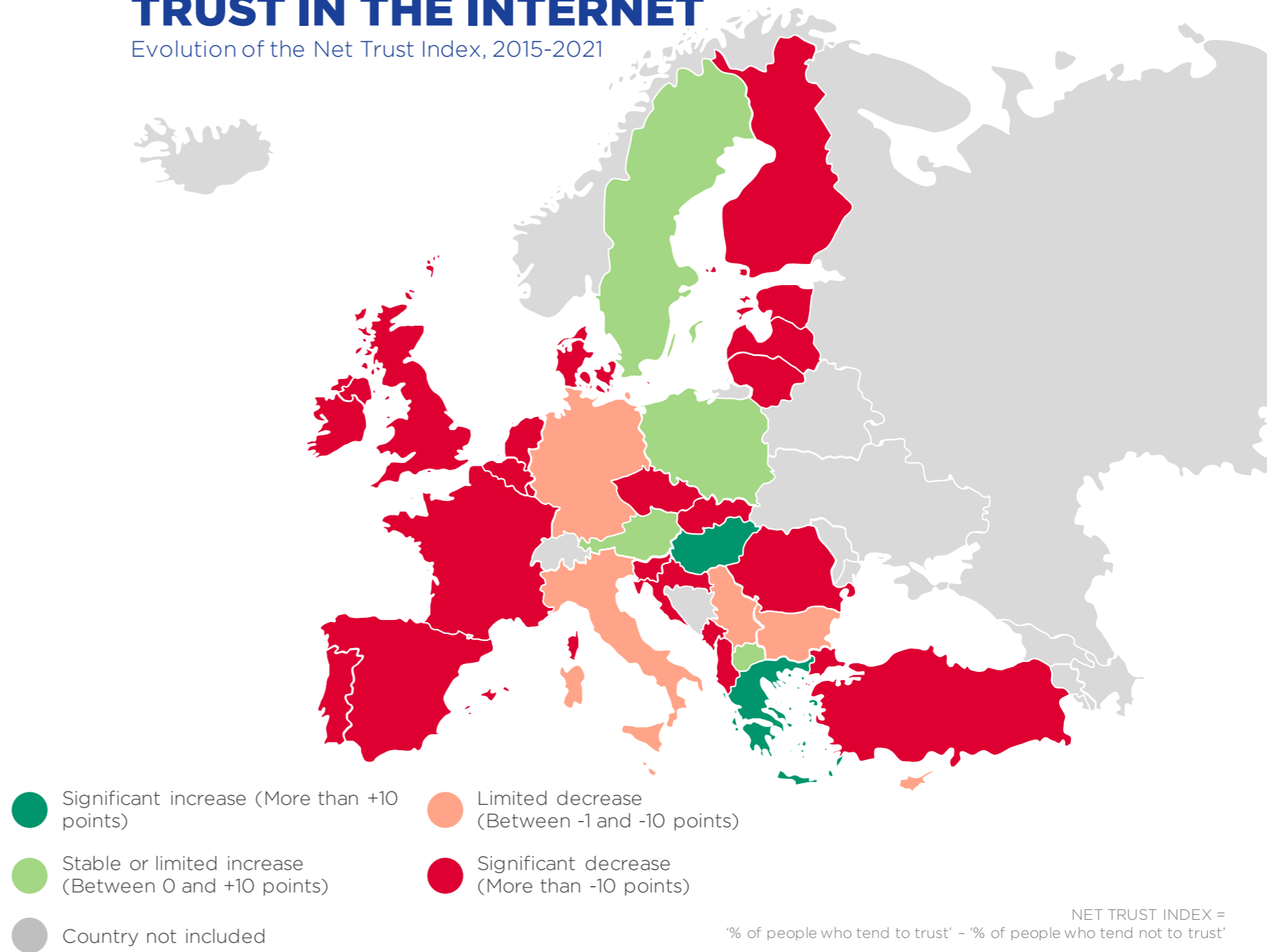


# TRUST IN THE INTERNET DECLINED IN 27 COUNTRIES

- Citizens' trust in the internet is down in 27 of 33 countries (82%) compared to 2015.
- Only in Hungary (+26 points) and Greece (+14 points) did the internet increase its position significantly.

## TRUST IN THE INTERNET

Evolution of the Net Trust Index, 2015-2021

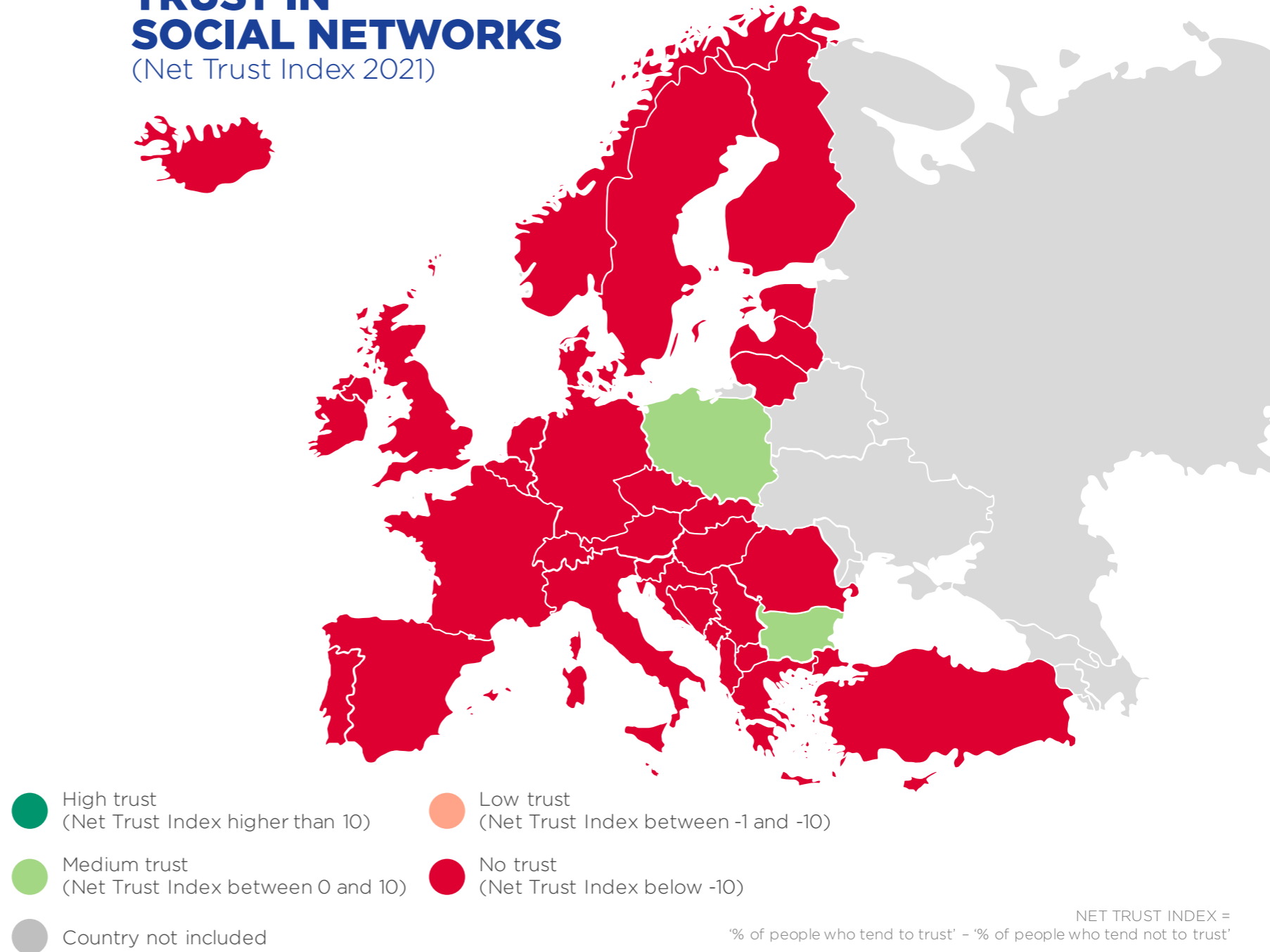


# TRUST IN SOCIAL NETWORKS

# CITIZENS DO NOT TRUST SOCIAL NETWORKS IN ALMOST ALL OF EUROPE

- In 95% of the countries covered, social networks receive negative Net Trust values, meaning that a majority of citizens do not trust them.
- Only in Bulgaria and Poland, social networks reach slightly positive values.

## TRUST IN SOCIAL NETWORKS (Net Trust Index 2021)

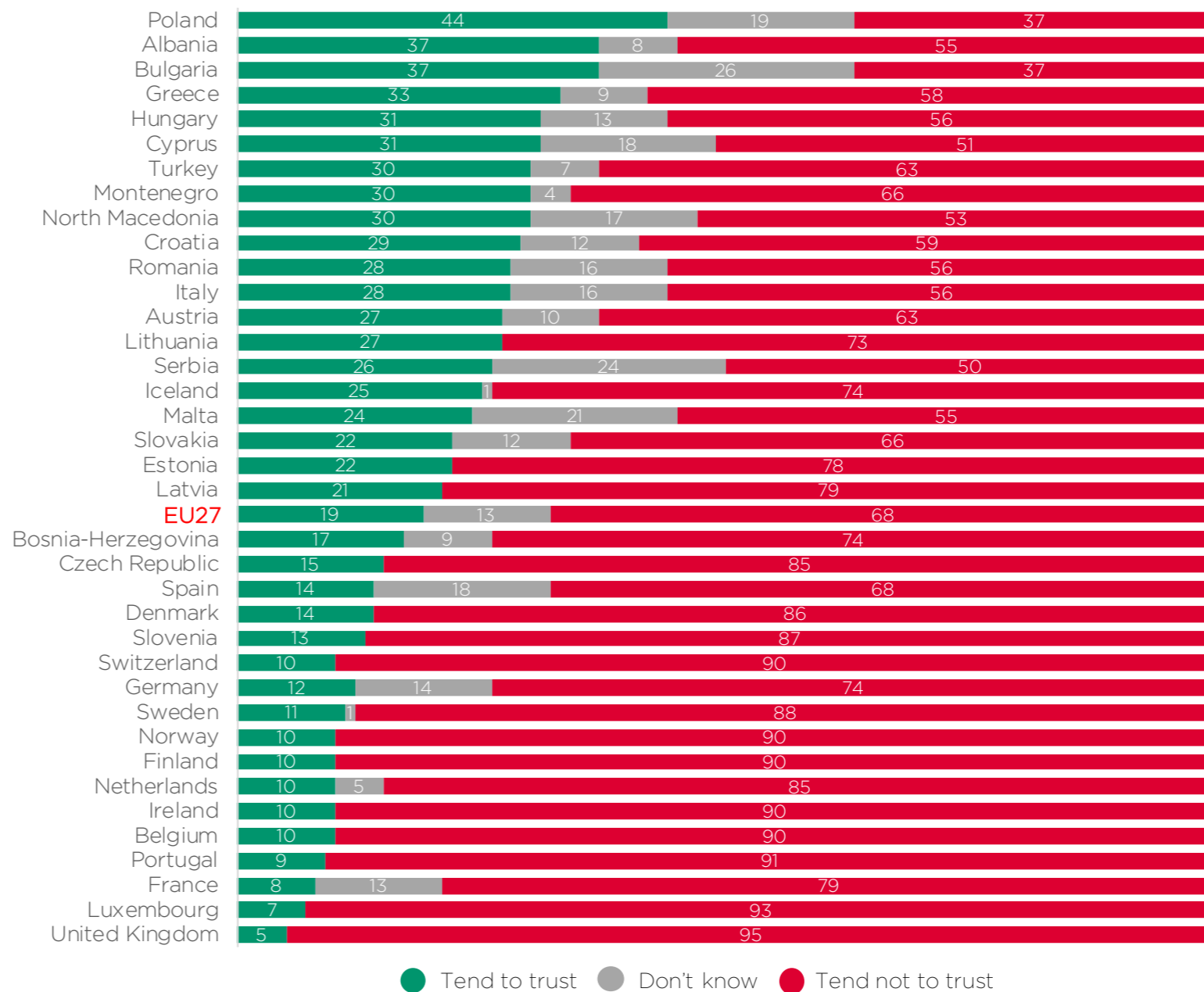


# TRUST IN SOCIAL NETWORKS IS LOWEST IN THE UK

- On EU average, only 19% of the population tend to trust social networks.
- Nowhere on the continent, the share of those saying they tend to trust social networks is higher than 50%. In the UK, only 5% of citizens tend to trust.

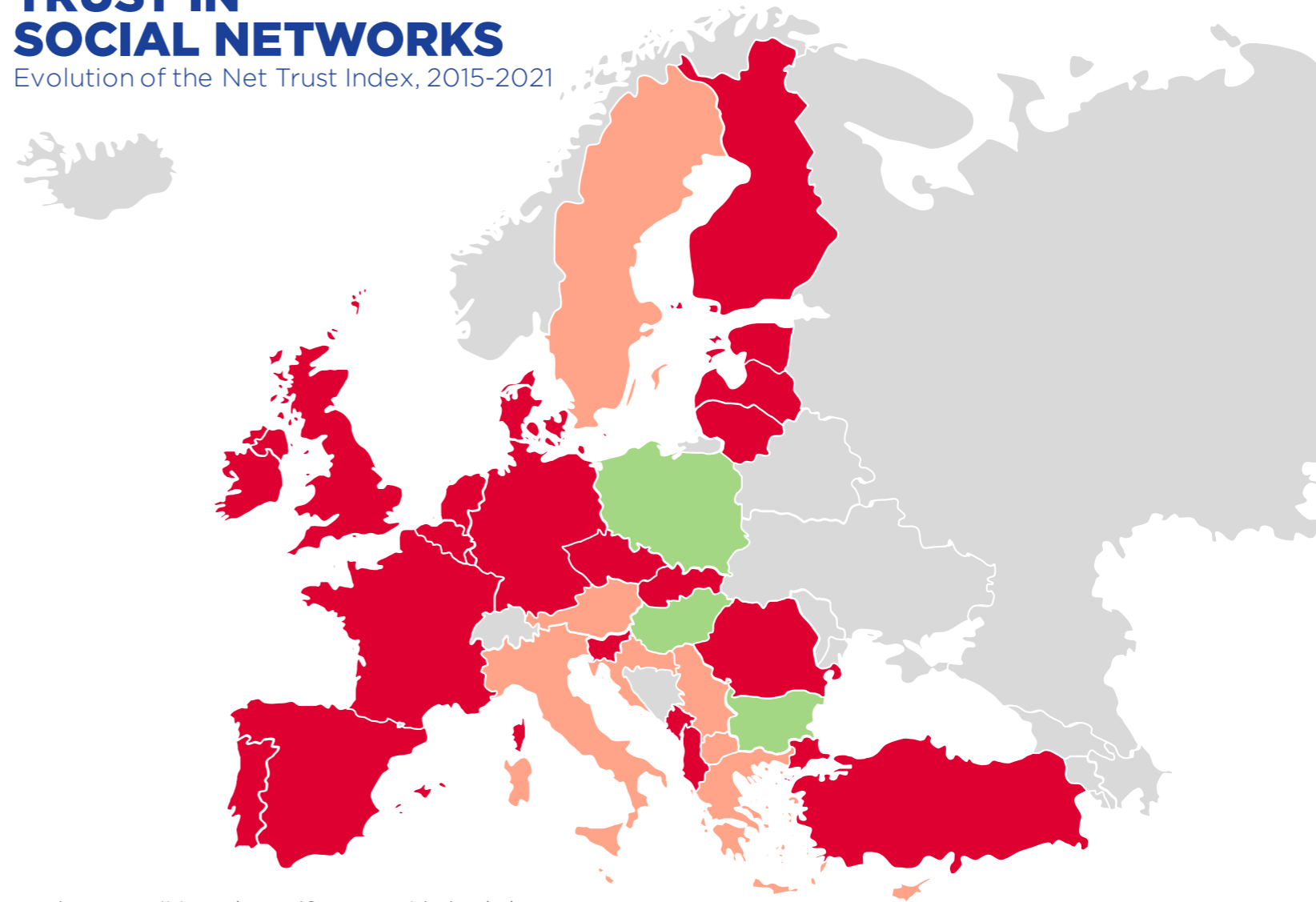
## TRUST IN SOCIAL NETWORKS

(% of population 2021)



# TRUST IN SOCIAL NETWORKS

Evolution of the Net Trust Index, 2015-2021



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

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

## TRUST IN SOCIAL NETWORKS IS IN DECLINE IN MOST OF EUROPE

- In 30 of the 33 countries already covered in 2015, trust in social networks has declined. At the time, it was already at negative levels in most countries.
- Only Poland, Hungary, and Bulgaria have seen increases.

# TRUST: IT'S COMPLICATED

Measuring trust is a tricky endeavour given its multidimensionality and contextuality. While a wide array of studies track trust in the media and other institutions or businesses across markets worldwide, these apply different methodologies and definitions.

The following section collects inspiring insights from recent international research on trust and its implications for media organizations and their strategies. We also present selected findings from academic and industry research on which groups in society tend to trust the media in general and PSM in particular – and which ones rather distrust.

# 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\*](#)

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\*](#)

I am going to name a number of organizations. For each one, could you tell me how much confidence you have in them: is it a great deal of confidence, quite a lot of confidence, not very much confidence or none at all?

[\*World Values Survey\*](#)

How much trust do you have in certain media? For each of the following media, do you tend to trust it or tend not to trust it?

[\*Eurobarometer\*](#)

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\*](#)

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\*](#)

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. Reuters research shows that not surprisingly, citizens tend to put somewhat higher trust levels when explicitly asked about news they use compared to news in general (see [page 21](#)). However, lower trust does not automatically imply less usage.



# 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\*](#)

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

[\*Knight Foundation \(2018\): Social and Political Trust: Concepts, Causes and Consequences\*](#)

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

[\*Ipsos \(2019\): Trust - the Truth?\*](#)

Following both the public debate and the scholarly literature, it is often assumed that media trust is falling virtually everywhere. The perhaps most important reason is the long-term trend with respect to Americans' shrinking trust in the 'press,' which then is extrapolated, and that people – even scholars – tend to infer the accuracy and consensus of opinion from the number of times it has been repeated. The fact though is that media trust (...) differs across countries (...). Nevertheless, it is abundantly clear that many people do not trust traditional news media.

[\*Jesper Strömbäck et al. \(2020\): News media trust and its impact on media use: toward a framework for further research\*](#)

No, the widely noted decline in trust in the press is not happening everywhere in the world. Trust in the press is continuously eroding in a smaller proportion of the investigated societies, while for most countries, it seems rather fluctuating in somewhat modest terms.

[\*Thomas Hanitzsch et al. \(2018\): Caught in the Nexus: A Comparative and Longitudinal Analysis of Public Trust in the Press\*](#)

Much has been written about a perceived or actual drop of trust in the media, but the question should rather be: Which trust and which media? Research indicates that there is no universal decline of trust in the news media, but a significant trust gap between traditional quality media and digital platforms such as social networks or search engines in many countries. This might mirror prevailing concerns about the spread of misinformation. Thus, investigating on, investing in and renegotiating trust are key performance markers for quality media such as PSM.

# CREATING TRUST



However, it would be wrong to suggest that everyone is happily bobbing around in a sea of disinformation or naively consuming only content that reinforces prejudices. We see evidence of a growing desire for self-improvement, with a big leap in people prioritising increasing their media and information literacy compared to last year (...).

[\*Edelman \(2021\): Can the Media Regain Trust?\*](#)

There are also real dangers lurking here for news organisations that invest in extensive newsgathering operations and expect to establish trust with users merely on the basis of the quality of their journalism or the transparency of their methods. While some users do pay close attention to editorial practices, the tendency to fall back on reputational cues means legacy brands may be able to trade on their past track-records whether warranted or not. And news that is deserving of trust does not always go hand-in-hand with being perceived as trustworthy.

[\*Reuters Institute \(2021\): Listening to what trust in news means to users: qualitative evidence from four countries\*](#)

For those news organisations looking to increase their audience trust, it therefore may make sense to reflect on how they cover certain groups. The data here can reveal the fault lines in public attitudes, but the challenge for journalists and news organisations is deciding where to focus their efforts (...).

[\*Reuters Institute Digital News Report 2021\*](#)

We can demonstrate our intentions and ethics by fully describing ownership structures, funding sources and protections against allowing an owner's political or social interests to seep into reporting. We can pull back the curtain on our processes. How do journalists build expertise on an issue, topic or community over time? (...) But that's not enough. We also need to back up our claims with action. People who are confident they can assess news may well be relying on information – not journalism – that reinforces their own world view. It's easy to shake our heads about confirmation bias. But what if they simply don't see themselves in legitimate news?

[\*Ipsos \(2020\): Trust Misplaced\*](#)

While claims of a universal demise of trust in the media and other institutions have become widespread, strategies to invest in organizational or brand trust require a more fine-grained approach. Which are the parts of society trusting the news media or a certain brand or organization, and which are the ones distrusting it? How can we reach those who have less trust? Which are the measures helping to (re)build and refine trust among all citizens? Asking such questions helps media organizations reshape their trust strategies according to the needs of their audience.

# TRUST AND DISTRUST

## WHO TRUSTS?

THE EDUCATED AND INFORMED



THOSE WHO TRUST EACH OTHER



THOSE WHO TRUST OTHER INSTITUTIONS



## WHO DISTRUSTS?

THE PARTISANS AND POPULISTS



THE YOUNGER

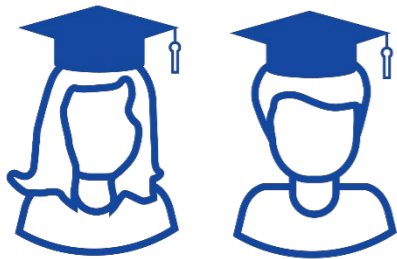


THOSE WHO LIVE IN MORE DEMOCRATIC SOCIETIES?



# WHO TRUSTS?

## THE EDUCATED AND INFORMED



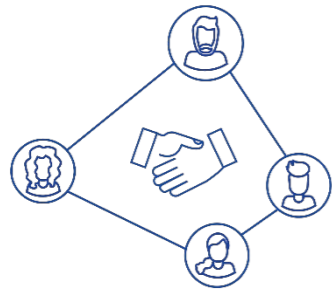
A lot of research indicates that the more educated parts of the public, and especially the more informed and politically engaged citizens, are more likely to trust the media or social institutions in general.

The [2021 Edelman Trust Barometer](#) reported a „record trust inequality“ between what it calls the „informed public“ and the „mass population“. On the global level, citizens belonging to the mass population are 16 percentage points less trusting than those who belong to the informed public – measured as an average of people’s trust in NGOs, business, government and media.

The informed public is defined not only as those with the highest education, but also those with higher incomes and highly engaged in public policy and business news. Research thus points out that those citizens who are active in society and interested in politics tend to trust the news more – a result also found by academic studies from [Hanitzsch et al. \(2018\)](#) and [Tsfati and Ariely \(2014\)](#) on more than 40 countries worldwide.

# WHO TRUSTS?

## THOSE WHO TRUST EACH OTHER



Interpersonal trust seems to be an important predictor: those who trust other persons are more likely to express higher levels of trust in the media, according to the studies of [Tsfati and Ariely \(2014\)](#) and [Hanitzsch et al. \(2018\)](#). This part of the population is also often found to be more engaged in public discourse. However, Tsfati and Ariely also found that this only holds true on the individual level, not on the country level: Countries with a higher percentage of people trusting each other were not necessarily countries with higher levels of media trust.

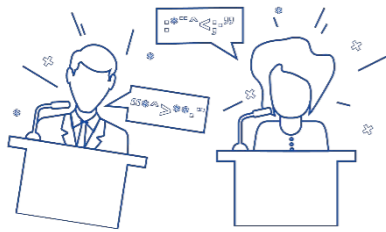
## THOSE WHO TRUST OTHER INSTITUTIONS



There is a nexus between media trust and trust in other major institutions of society, typically defined as political trust, social trust, or general trust. Those who trust political and other social institutions tend to trust the media more. Consequently, the often-described decline of trust in the media in recent decades could be explained in the light of shrinking levels of trust in major social institutions in general and in politics in particular – a trend which can be observed in many democratic countries. Research from [Hanitzsch et al. \(2018\)](#) also indicates that the relationship between trust in the media and political trust has grown stronger over time, meaning that nowadays, trust in the media and trust in political institutions has become more closely correlated than a few decades ago. According to the study conducted on 45 countries across the globe, political trust is even the most influential contextual factor for the level of trust people put in the media.

# WHO DISTRUSTS?

## THE PARTISANS AND POPULISTS



Declining levels of trust in the media are often explained against the background of increasing levels of political polarization and a growing partisan divide. Such conclusions, however, are typically drawn from research in the US, arguably a highly polarized society, and need to be carefully interpreted when drawing conclusions for other countries, even for other Western democracies.

Yet research from scholars such as [Schranz et al. \(2018\)](#) or [Suiter and Fletcher \(2020\)](#) still demonstrates that people with rather strong partisan beliefs at the margins of the political spectrum – typically both those at the left and the right – tend to have at least slightly less trust in mainstream media. This points to the Hostile Media Effect, a strong feeling harboured by partisans that the news media is biased against their political views, strongly favouring the other side instead.

However, the degree to which the partisan divide determines levels of trust differs significantly between countries. For example, according to data on the US from the [Reuters Institute Digital News Report](#), self-identified right-wingers are more than twice as likely to distrust the news, compared to those on the left. In this regard, it also needs to be noted that perceptions of what the terms “right” and “left” actually mean may differ from country to country.

Moreover, the success of populism and populist leaders in many countries is commonly believed to hollow out trust in mainstream media. Research from [Fawzi \(2019\)](#) in Germany has demonstrated that those who hold populist views, understood as holding strong anti-elitist attitudes, also are less likely to trust quality media. This is perhaps not surprising given the connection, revealed by research, of trust in mainstream media and trust in major political institutions. However, the study also found that two other dimensions of populist world views – i.e., a strong emphasis on a homogenous population and anti-outgroup sentiment – had no effect on respondents’ trust in quality media.

# WHO DISTRUSTS?

## THE YOUNGER



## THOSE WHO LIVE IN MORE DEMOCRATIC SOCIETIES?



Scholarly work such as from [Schranz et al. \(2018\)](#) indicates that younger generations are more likely to distrust the media. According to their study, trust was highest among middle-aged people (30-49), and declined again amongst those above the age of 50.

As tempting as it is to assume that the more democratic a country, the higher the trust its population puts in institutions such as the media, research draws a somewhat more complex picture. There seems to be no clear connection between a country's degree of democracy and trust in the news media. Neither is there a negative correlation between trust and the quality of democracies, with low levels of trust observed in some democracies in recent years, and an increase of trust in others.

Results from [Tsfati and Ariely \(2014\)](#) and [Kalogeropoulos et al. \(2019\)](#) indicate that people in countries with lower economic development are more likely to trust the news media. Studies also point to cultural factors as determinants of trust levels, with higher trust in the media measured in many Asian or African countries compared to Western countries in the 44-country comparison by [Tsfati and Ariely \(2014\)](#). A similar study by [Hanitzsch et al. \(2018\)](#) found trust highest in Japan, China, India, and the Philippines, while lowest in Australia, the United States, and New Zealand.

In the most recent [Edelman Trust Barometer](#) survey, trust in the media was highest in Indonesia, China, and India, and lowest in Russia, Japan and France – countries differing significantly in terms of political, economic and cultural contextual factors.

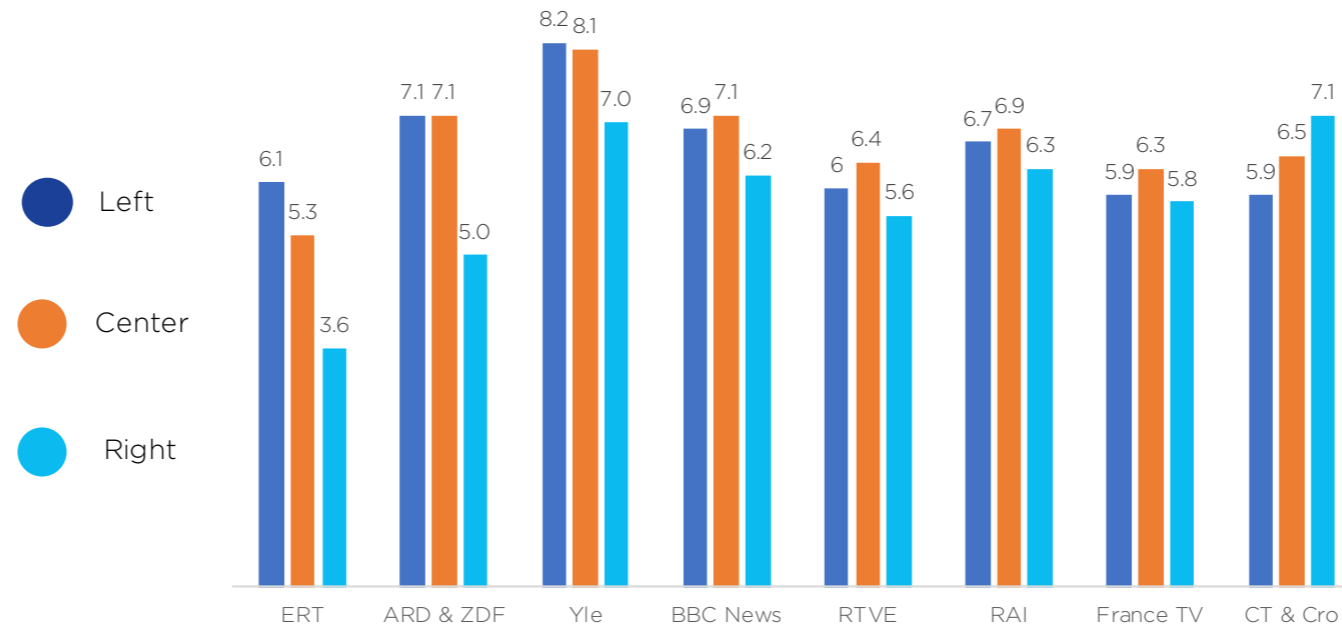
# WHO TRUSTS PSM?



## Partisanship

While PSM news are among the most trusted news brands in most European markets ([see page 19](#)), PSM are believed to receive less trust from precisely the groups which typically distrust the mainstream media, such as strong partisans and populists. A [2019 Reuters Institute study focusing on eight European countries](#) and PSM news indicates that while highly trusted in general, and often more so than their commercial competitors, PSM are less trusted by people holding right-wing and populist attitudes. In general, the study highlights a tendency towards those identifying more on the left putting more trust in PSM news than those on the right.

Yet a more nuanced picture emerges when taking a closer look at country level, as in the chart below, indicating the average level of trust in PSM news based on political leaning. In France, Italy, Spain, and the UK, PSM fared best in terms of trust among those who identify with the political center compared to audience segments at both margins. In Germany and Finland, citizens placing themselves in the center and those identifying more with the left express rather equal trust in their national PSM news. These rather moderate partisan trust gaps contradict to some extent the repeated allegations regarding a supposed leftist bias in PSM. At the same time, these results need to be interpreted carefully, as “left” and “right” are highly ambiguous terms signifying different things within different national contexts.



Note: Based on answers to “How trustworthy would you say news from the following brands is?”, scale ranges from 0 “not at all trustworthy” to 10 “completely trustworthy”.

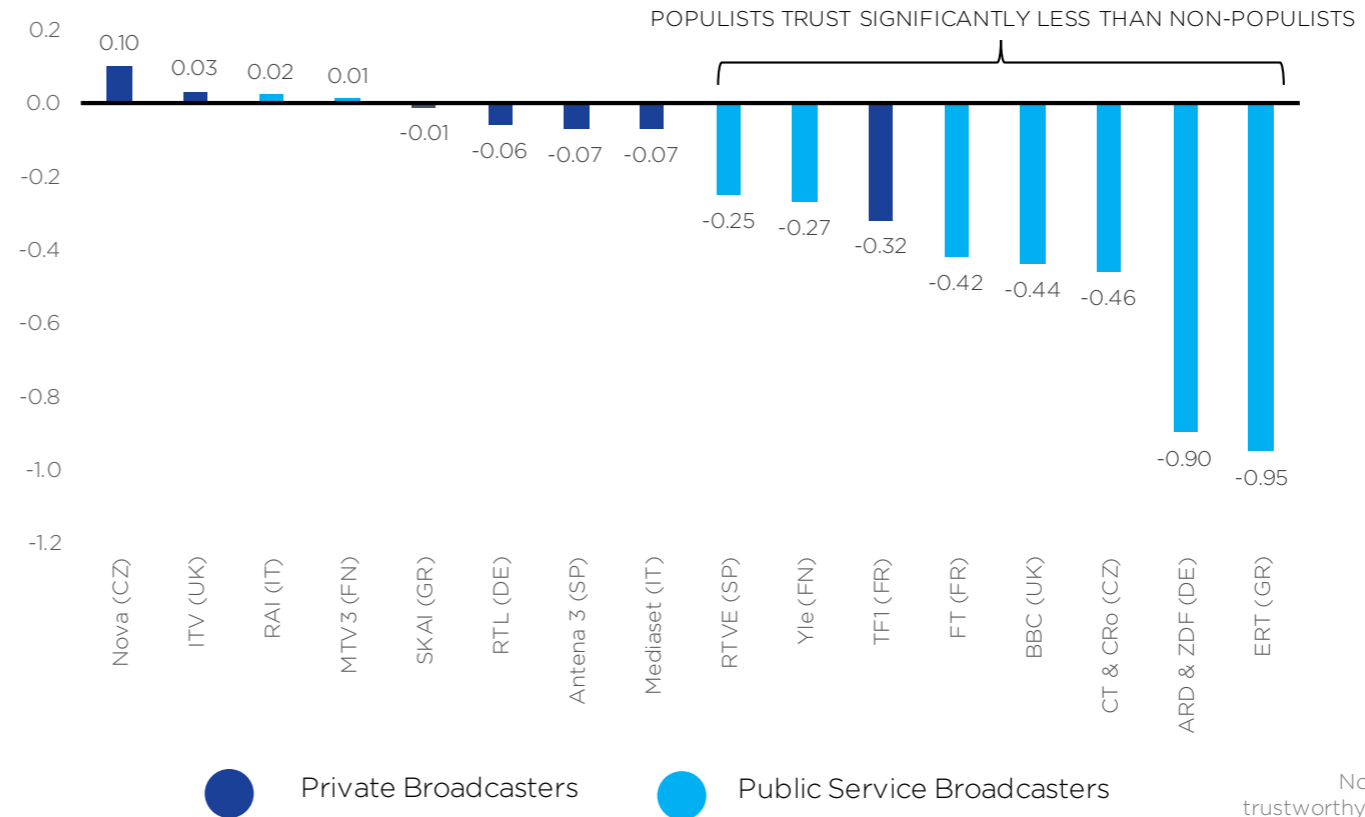


# WHO TRUSTS PSM?



## The populist divide

Yet trust gaps between citizens holding populist worldviews as opposed to non-populist citizens are even more pronounced than the left-right divide. The chart below from Reuters research shows the difference between average trust scores of populist and non-populist audience members for selected PSM and commercial broadcasters. PSM strategies could therefore focus on how to (re)gain the trust of these citizens.



Note: Based on answers to “How trustworthy would you say news from the following brands is?”, scale ranges from 0 “not at all trustworthy” to 10 “completely trustworthy”.

# WHO TRUSTS PSM?

## Strong and independent PSM benefit overall trust in media



Research from [Schranz et al. \(2018\)](#) on 13 countries in Europe and North America has pointed out that high levels of PSM consumption at the individual level goes along with higher trust in the media system. Citizens who use PSM as their main source of news – both online and offline – express higher levels of trust in the media. Consequently, the whole media landscape of a country benefits from strong PSM holding leading positions in the provision of news.

At country level, [Tsfati and Ariely's \(2014\)](#) study on trust in 44 states worldwide has demonstrated that state ownership of television is negatively correlated with media trust in non-democratic countries. At the same time, there is a positive correlation between state (i.e., public) ownership of television and media trust in more democratic societies. This makes the case for strong and independent PSM and their importance for overall trust in a country's media system.

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## DATABASES

Standard Eurobarometer datasets

EBU Trust in Media dataset

# APPENDIX: COUNTRY CODES

**AL - Albania**

**AT - Austria**

**BA - Bosnia and  
Herzegovina**

**BE - Belgium**

**BG - Bulgaria**

**CY - Cyprus**

**CZ - Czech Republic**

**CH - Switzerland**

**DE - Germany**

**DK - Denmark**

**EE - Estonia**

**ES - Spain**

**FI - Finland**

**FR - France**

**GR - Greece**

**HR - Croatia**

**HU - Hungary**

**IE - Ireland**

**IT - Italy**

**IS - Iceland**

**LT - Lithuania**

**LU - Luxembourg**

**LV - Latvia**

**ME - Montenegro**

**MK - North Macedonia**

**MT - Malta**

**NL - Netherlands**

**NO - Norway**

**PL - Poland**

**PT - Portugal**

**RO - Romania**

**RS - Serbia**

**SE - Sweden**

**SI - Slovenia**

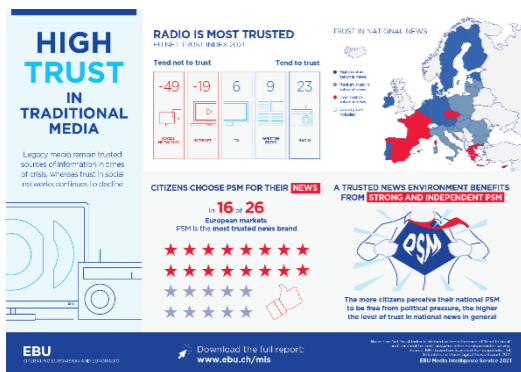
**SK - Slovakia**

**TR - Turkey**

**UK - United Kingdom**

# OTHER MATERIAL ON TRUST IN MEDIA

## TRUST IN MEDIA INFOGRAPHIC



For key statistics and illustrations related to Trust in Media 2021 take a look at the infographic.

## TRUST IN MEDIA 2021 DATASET



If you would like to delve deep into the figures, take a look at the MIS Trust in Media dataset and explore the development of Net Trust in the media in the EU member states and candidate countries since 2009.

## TRUST IN MEDIA 2021 SLIDE DECK



A comprehensive collection of the charts, tables and maps used for Trust in Media 2021.

# WHAT SHOULD I READ NEXT?



## DIVERSITY AND PUBLIC SERVICE MEDIA 2021

Explore this fact-based panorama of diversity within European media, highlighting persisting underrepresentation and covering also PSM's initiatives and engagement.

[Download full report here](#) (public)



## PUBLIC SERVICE MEDIA AND NEWS 2021

We're proud to share our first-ever focus report on a topic which lies at the core of the PSM remit: news. Take a look at an overview of public service media's outstanding commitment, exceptional offer and strong performance in news.

[Download full report here or take a look at the slide deck](#) (public)

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## PUBLICATION

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September 2021

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