

EBU

OPERATING EUROVISION AND EURORADIO

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TRUST IN PUBLIC SERVICE MEDIA 2022

PUBLIC VERSION

MEDIA INTELLIGENCE SERVICE
OCTOBER 2022



ABOUT THIS REPORT

Trust in the relationship between media and their audiences is vital. This is particularly true for public service media due to their public remit and funding as well as their obligation to provide credible news and current affairs programming. 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 PSM. This is crucial for audience building and essential for PSM'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.
- Public service media can work to maintain and increase audience 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.
- For public service media, trust is also a key aspect of social responsibility.

SOURCES AND METHODOLOGY

Flash Eurobarometer: News & Media Survey 2022

For the figures on trust in public service radio and TV news, data from the [Flash Eurobarometer: News & Media Survey 2022](#) have been used. What is it?

- A survey of European citizens' media use and media habits, as well as attitudes towards the news media
- Conducted in each of the 27 EU Member States in April and May 2022 by Ipsos European Public Affairs on behalf of the European Parliament
- Based on online interviews with 52.347 respondents representative of EU citizens aged 15+

The question asked with about trust in PSM news is:

Which news sources do you trust the most?

Respondents were allowed to choose up to three news sources from a pre-selected list. One of the options was "Public TV and radio stations (incl. online)".

Reuters Institute Digital News Report 2022

The [annual study](#) commissioned by the Reuters Institute for the Study of Journalism analyses how the news is consumed in a range of countries, including trust in news. The online survey research was conducted by YouGov in late January/early February 2022 and reflects the online population of each country, comprising 46 countries worldwide, 24 of which in Europe. Unlike the Flash Eurobarometer survey, Reuters Institute asks for trust in specific brands rather than trust in public radio and TV in general, with no specific brand being named. Therefore, the results of the two surveys are not directly comparable.

The survey question related to trust in PSM news is the following:

How trustworthy would you say news from the following brands is?

Respondents rank selected brands on a 10-points scale from "0: not at all trustworthy" to "10: completely trustworthy". The list includes national broadcasters, print and digital outlets.

To correlate the data on trust in PSM with a variety of other indicators, we mainly used data from **Standard Eurobarometer**, a regular survey commissioned by the European Commission. The [96th wave of the survey](#) used here was conducted by Kantar in January-February 2022 in the 27 EU Member States and 10 additional countries. Among others, we use Eurobarometer data to illustrate trust levels in national news in general, and to juxtapose trust in PSM with data on how citizens perceive the political independence of their public broadcaster or their level of satisfaction with democracy ([see page 6 for more details](#)).

Data from EBU Members' national surveys

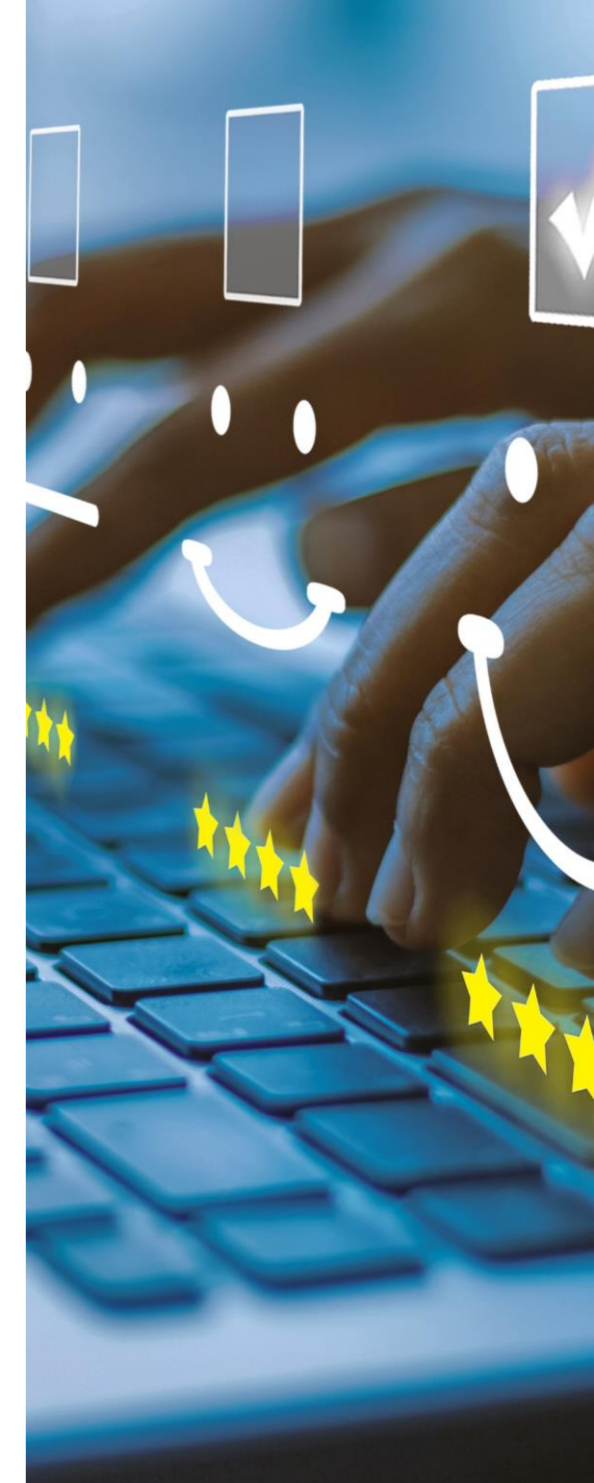
To glean additional insights in trust in PSM and to see how it compares to other news media and social institutions at the national level, we collected data on trust from EBU Members. Mostly, these stem from national surveys conducted on behalf of the respective member organization; in a few cases, Members provided us with figures from third-party research. Due to different methodologies and survey questions, these results may differ from the figures of the Flash Eurobarometer survey or the Reuters Digital News Report. Likewise, these data are not directly comparable with each other. Additional information on the methodology of these surveys can be found on page 24.

Additional data

To correlate trust in PSM with other indicators of the wellbeing of national media systems, we used data from the [2022 RSF World Press Freedom Index](#) and the [7th wave of the World Values Survey](#) ([see page 6 for more details](#)).

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KEY FINDINGS



PSM NEWS IS MOST TRUSTED

PSM news is most trusted in 28 of 31 European countries under study, including 25 of the 27 EU Member States. Public radio stations, TV channels and digital offers are thus **relied on by citizens for credible information**.

Within the EU, trust in PSM news is highest in the Nordics, Estonia, Portugal, Luxembourg and Germany.

Insights from national surveys demonstrate that **PSM news** is often not only the most trusted source of information, but the broadcasters of this news also rank among the **most trusted institutions and organizations** of a country.

TRUST GAP BETWEEN PUBLIC & PRIVATE RADIO + TV

On EU average, 49% of citizens rank PSM among their three most **trustworthy news sources**, ranking as the top trusted news source across the community of states.

Their closest competitor in terms of trust is the written press, following at some distance with a score of 39%. Even further behind are commercial broadcasters (27%). There is thus a **considerable trust gap of 22 percentage points between PSM and commercial broadcasters**.

LITTLE TRUST IN ONLINE PLATFORMS

Citizens still place much more trust in information from **legacy media** including their online offers, compared to purely digital news sources. This applies to news citizens get from friends on social media: only 14% of the EU population rank this among their top trusted sources of information. Even more strikingly, only 11% perceive of online news platforms as a top news source.

This may reflect citizens' awareness about the current debates on a surge of "fake news" online – a finding underlined by the fact that the **greater the trust in PSM** in a country, the **fewer the number of citizens concerned about misinformation**.

MEDIA SYSTEMS BENEFIT FROM STRONG PSM

The more citizens trust PSM news, the greater the trust in national news overall in that country.

Furthermore, in countries with higher trust in PSM news, citizens are more likely to be satisfied with the **diversity of opinions in national media** in general. They are also more likely to **perceive election reporting as fair** when trust in PSM news is higher.

This points to **spillover effects** from PSM performance to commercial media and citizens' perceptions of the media system in general. Strong, free and trusted public media are a **key component of a credible and trustworthy news media landscape**, which benefits PSM's competitors, too.

GREATER SATISFACTION WITH DEMOCRACY

The more citizens of a country trust their public broadcasters, the higher the number who are also **satisfied with the way their national democracy functions**.

This reflects findings from academic and industry research that point towards a **"virtuous circle"** between strong, independent and credible PSM on the one hand, and strong and **healthy democracies** on the other.

METHODOLOGY

Choosing relevant indicators

To investigate the relationship between trust in PSM and a variety of other factors related to a sound media landscape, we selected a range of indicators to be tested in correlations.

Trust in PSM news vs.

Standard Eurobarometer:

- Concern about Misinformation
- Satisfaction with Democracy
- Perceived Pressure on PSM
- Trust in National News in General
- Perceived Diversity of Opinions in National Media

Reporters without Borders (RSF):

- RSF World Press Freedom Index

World Values Survey (WVS):

- Perceived Fairness of Election Coverage

Testing Correlations

After compiling datasheets with the relevant indicators, correlation analysis tests were run with the Jamovi data-analysis tool, to determine the strength of the correlation and its level of significance.

Pearson Correlation Coefficient (r)

A measure of the linear correlation between two variables
Equals a value between +1 and -1: a coefficient of +1 indicates a perfect positive correlation, 0 indicates no correlation at all, -1 a perfect negative correlation.

Moderate correlation: 0.4 to 0.6 or -0.4 to -0.6

Strong correlation: 0.6 to 1 or -0.6 to -1

Level of significance (p-value)

Is the correlation statistically significant, or is it only by chance?

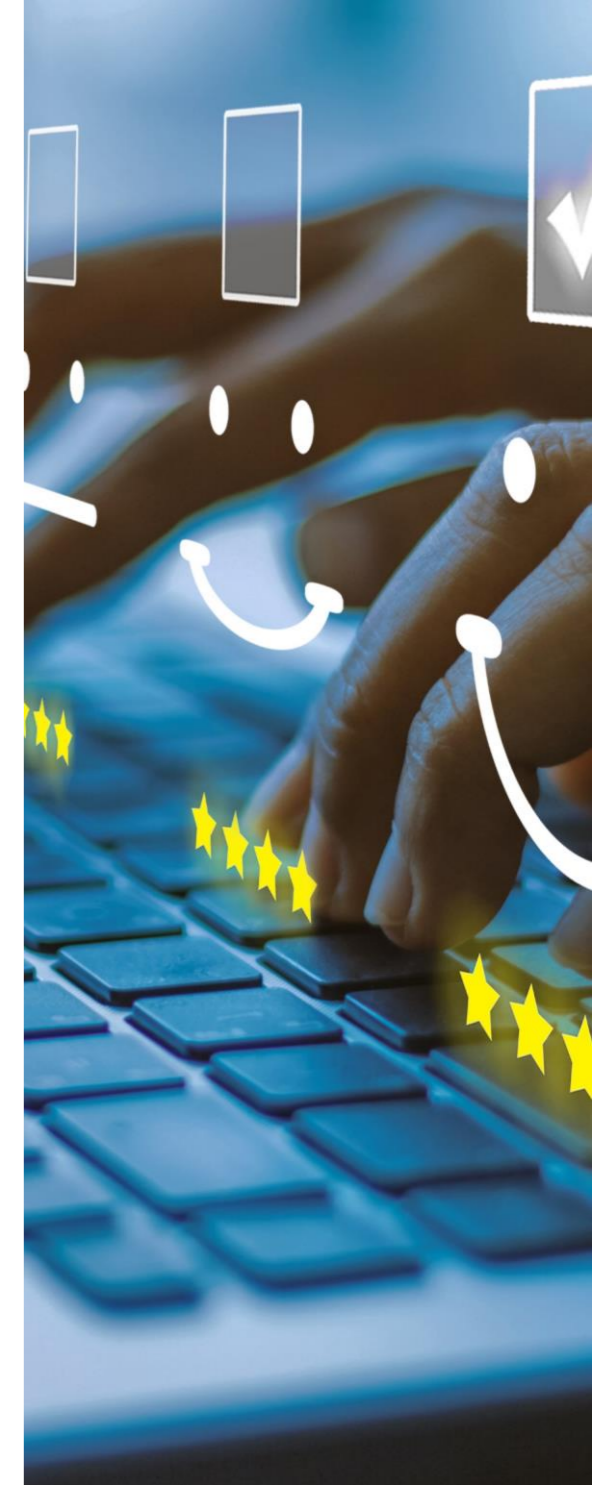
If $p < 0.05$ the correlation is statistically significant: increases or decreases in one variable significantly relate to increases or decreases in the second variable.

All correlations shown in this report are statistically significant with p-values < 0.05 , most of them with p-values < 0.001 .

CORRELATION \neq CAUSATION

A correlation only implies that two things tend to go together, but not that one causes the other.



TRUST IN PUBLIC SERVICE NEWS ACROSS EUROPE






PSM NEWS IS MOST TRUSTED IN 28 OF 31 EUROPEAN COUNTRIES

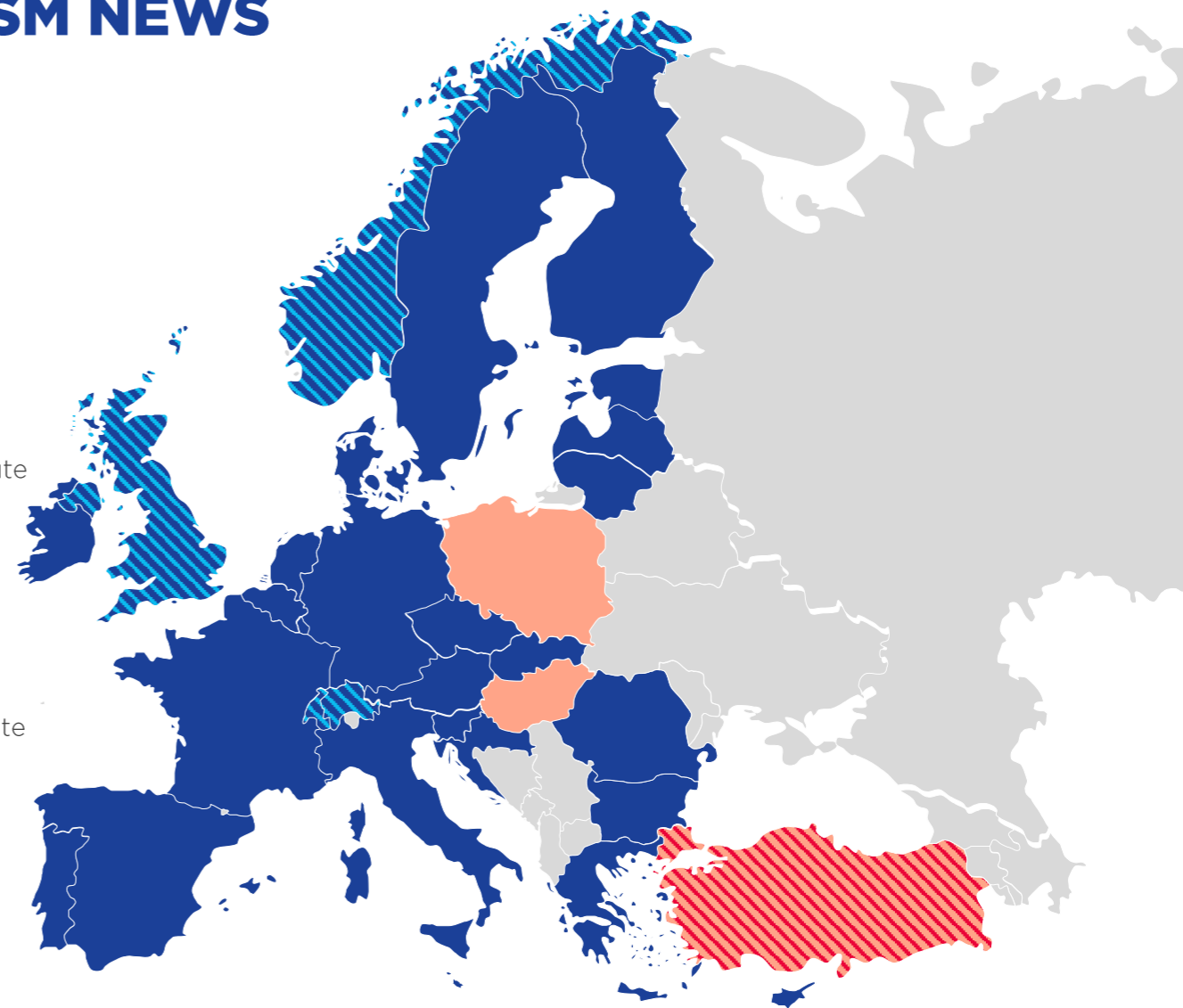
TRUST IN PSM NEWS (2022)

PSM most trusted news source/brand :

-  Source Flash Eurobarometer
-  Source Reuters Institute Digital News Report

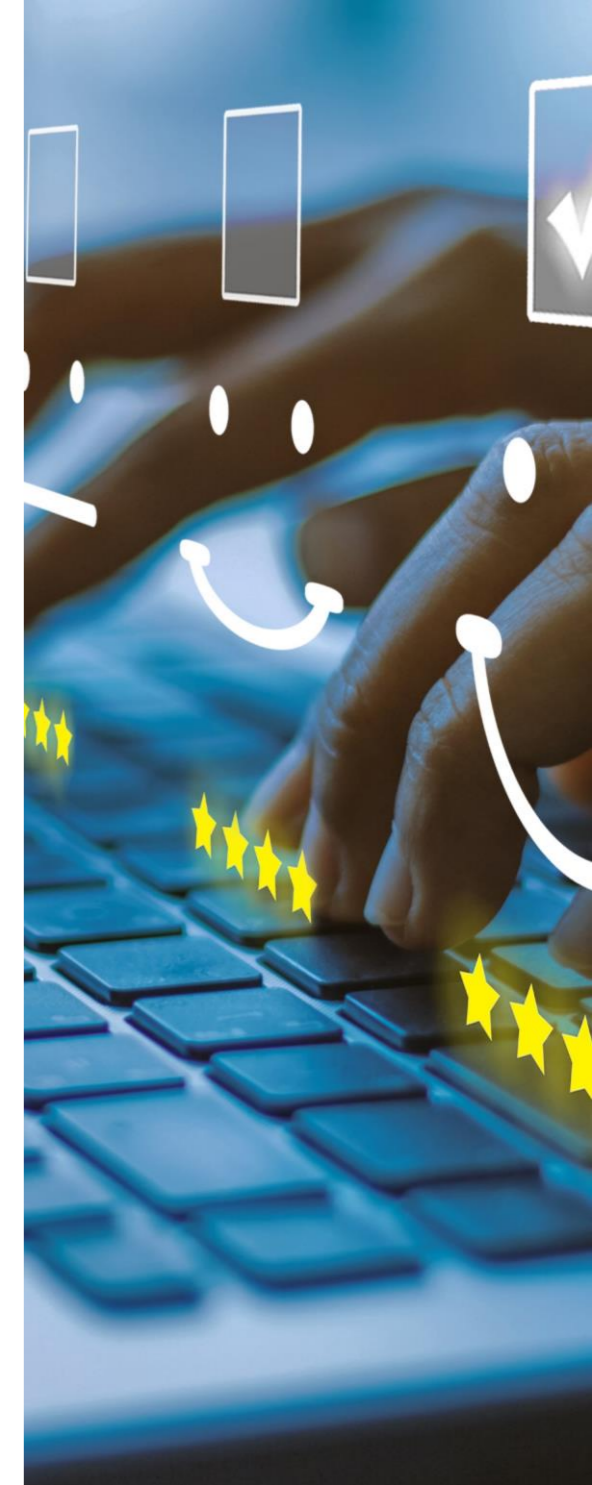
PSM not most trusted news source/brand :

-  Source Flash Eurobarometer
-  Source Reuters Institute Digital News Report
-  Country not included



- Public service media news is most trusted in 28 of 31 European countries, including 25 of the 27 EU Member States. Only in Poland, Hungary and Türkiye, PSM are not the most trusted news source. In 14 of the 27 EU countries (52%), at least half of the population mention PSM among the news sources they trust the most. Also in the UK, Norway and Switzerland (French and German-speaking parts), more than half of the population ranks PSM news as a top trust brand.
- In 3 EU countries (Finland, Estonia, and Portugal), at least two thirds of the population consider public broadcasters to be among the most trustworthy news sources. The same applies to PSM brand trust scores in Switzerland (French and German-speaking parts) and Norway.

INSIGHTS FROM NATIONAL SURVEYS



TRUST IN PSM: INSIGHTS FROM NATIONAL SURVEYS



68% of Icelanders trust RÚV's news, whereas 66% trust the broadcaster itself.

Survey questions:
How much or little trust do you have in RÚV news?
How much or little trust do you have in RÚV?
(5-point scale from "a lot of trust" to "very little trust")



85% of Norwegians trust in NRK.

Survey question:
How much or little trust do you have in NRK? (4-point scale from "a lot of trust" to "very little trust")



83% of Finns consider Yle's news as trustworthy. It is thus the most reliable news media in the country. In a ranking of the most trusted institutions in the country, Yle holds the 6th position, with 69% saying they trust it.

Survey questions:
How much confidence do you have in the Finnish institutions that I have listed next?
(5-point scale from "I trust very much" to "I do not trust at all")
How reliable do you find the following news media?
(5-point scale from "extremely reliable" to "extremely unreliable")



DR's main TV news bulletin *TV Avisen på DR1* is the most trusted news brand in the country. 82% of Danes trust it. The main public radio news journal, *Radioavisen fra DR*, ranks 3rd with 74% trusting it. When asked about DR as an institution, 70% of Danish people say they trust it.

Survey questions:
To what extent do you generally trust news from the following? (10-points scale)
To what extent do you generally trust the following?
(4-point scale from "totally" to "not at all")



75% of Swedish people trust in the content provided by their public television broadcaster SVT. For public radio SR, this figure stands at 72%.

Survey questions:
How much trust do you have in the way the following institutions and groups carry out their work?
How much trust do you have in the content of the following media and internet services?
(5-point scales from "a lot of trust" to "very little trust")

TRUST IN PSM: INSIGHTS FROM NATIONAL SURVEYS



48% of British adults that follow the news say they are most likely to turn to the BBC for news they trust. There is a considerable trust gap between the BBC and its competitors: Sky News follows as the 2nd most trusted news source, but with only 8%. Similarly, 39% say that the BBC is the *one* source they turn to for impartial news coverage; Sky News follows with 9%.

Survey questions:
Of all the news sources (TV, radio, newspaper, magazine, website, app or social media) which one source are you most likely to turn to for news you trust the most/if you want impartial news coverage? (list of selected news brands)



67% of Flemish people trust VRT, ranking it as the 5th most trusted institution. 73% say they trust VRT's TV news, 68% trust VRT's radio news. Both VRT radio and TV are thus the most trusted news sources in the country.

Survey questions:
To what extent do you have trust in the following organisations and institutions?
Can you indicate to what extent you trust the following news sources? (4-point scale from "a lot of trust" to "no trust at all")



68% of Germans perceive the TV news coverage of ARD and ZDF as trustworthy. German public broadcasters are the 5th most trusted institution, after the police, the Federal Constitutional Court, and two consumer protection institutions. 70% of Germans trust their PSM, compared to only 19% that trust commercial broadcasters.

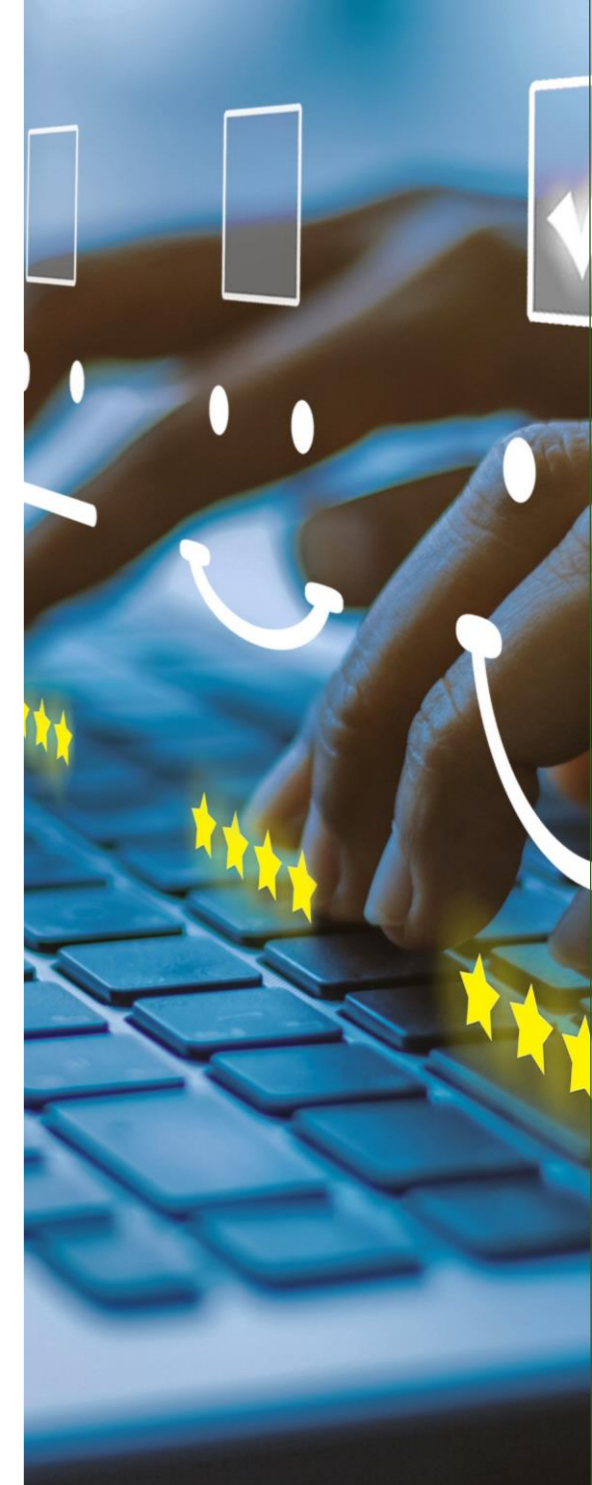
Survey questions:
When it comes to reporting on public television stations like ARD and ZDF, is your trust that they report truthfully very high, high, not that high, or do you have no trust at all?
I will now name a number of institutions and organisations. Please tell me for each one how much trust you have in them: a lot of trust, some trust, little trust, or no trust?



74% of Estonians trust their public broadcaster ERR. By comparison, only 51% trust commercial broadcasters in the country. The average across all institutions covered is 66%.

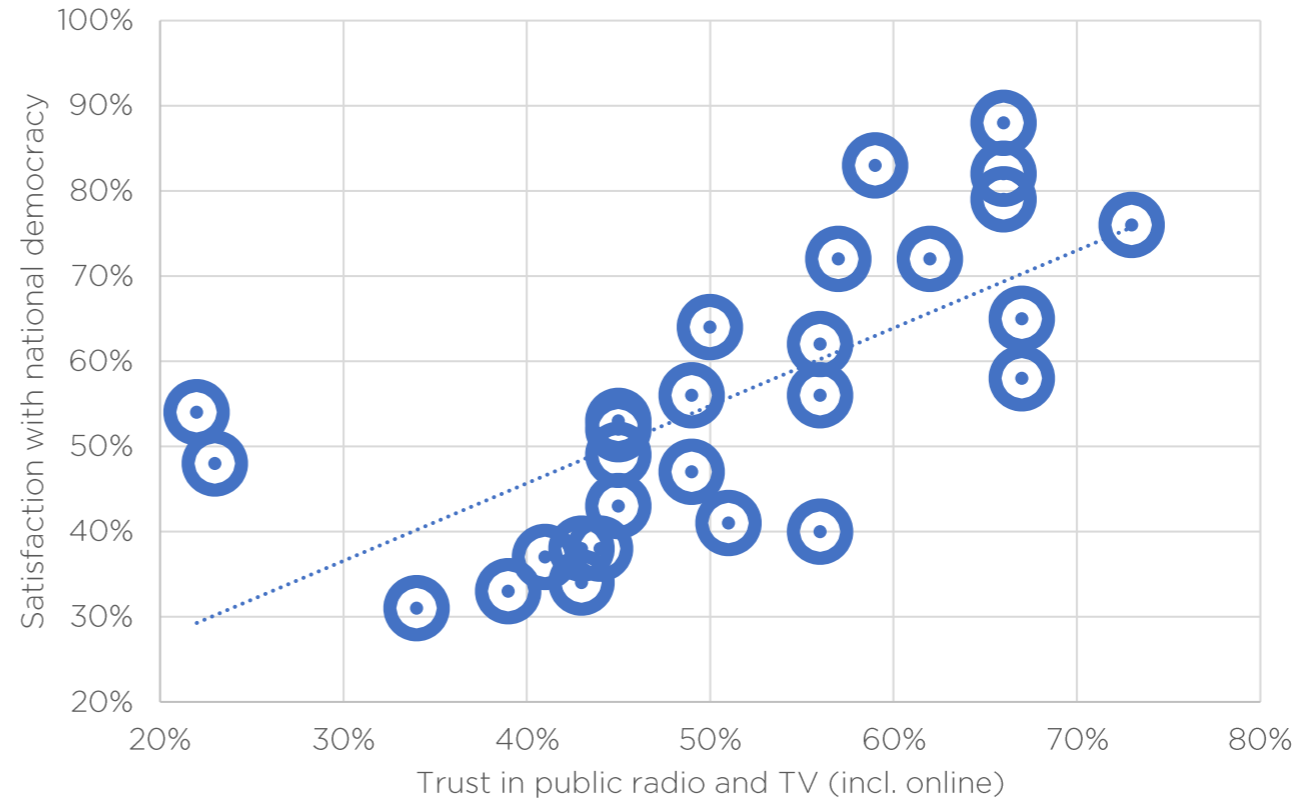
Survey question:
To what extent do you trust the following institutions? (4-point scale from "trust completely" to "do not trust at all")

HOW TRUST IN PSM RELATES TO HEALTHY DEMOCRACIES



HAVING HIGHLY TRUSTED PSM GOES HAND IN HAND WITH SATISFIED CITIZENS

TRUST IN PUBLIC RADIO AND TV vs SATISFACTION WITH NATIONAL DEMOCRACY

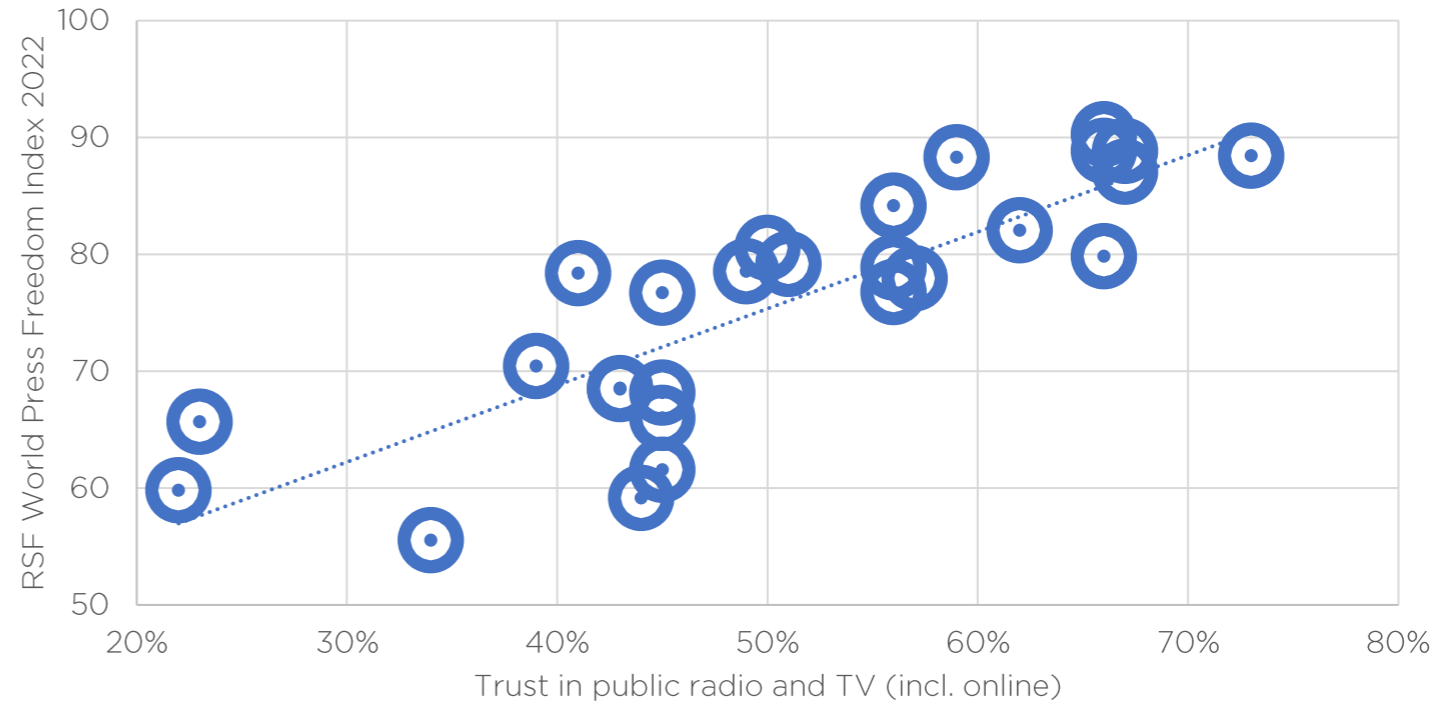


Strong positive correlation
Correlation coefficient: 0.70
 $p < 0.001$

- The more citizens in a country trust their public broadcasters, the more of them are satisfied with the way their national democracy functions. This reflects findings from research pointing towards [positive feedback loops between strong public broadcasters and healthy democracies](#).
- The citizens of the Nordics and Benelux states as well as Austria, Czechia, Germany, Ireland and Portugal are satisfied with their democratic system. Generally, these countries also rank among those in which citizens express greater trust in PSM news. Satisfaction with democracy is highest in Denmark (88%), Ireland (83%) and Sweden (82%). By contrast, both satisfaction with democracy and trust in PSM are lower in most of Southern, Central and Eastern Europe.

GREATER TRUST IN PSM GOES HAND IN HAND WITH HIGHER PRESS FREEDOM

TRUST IN PUBLIC RADIO AND TV vs PRESS FREEDOM

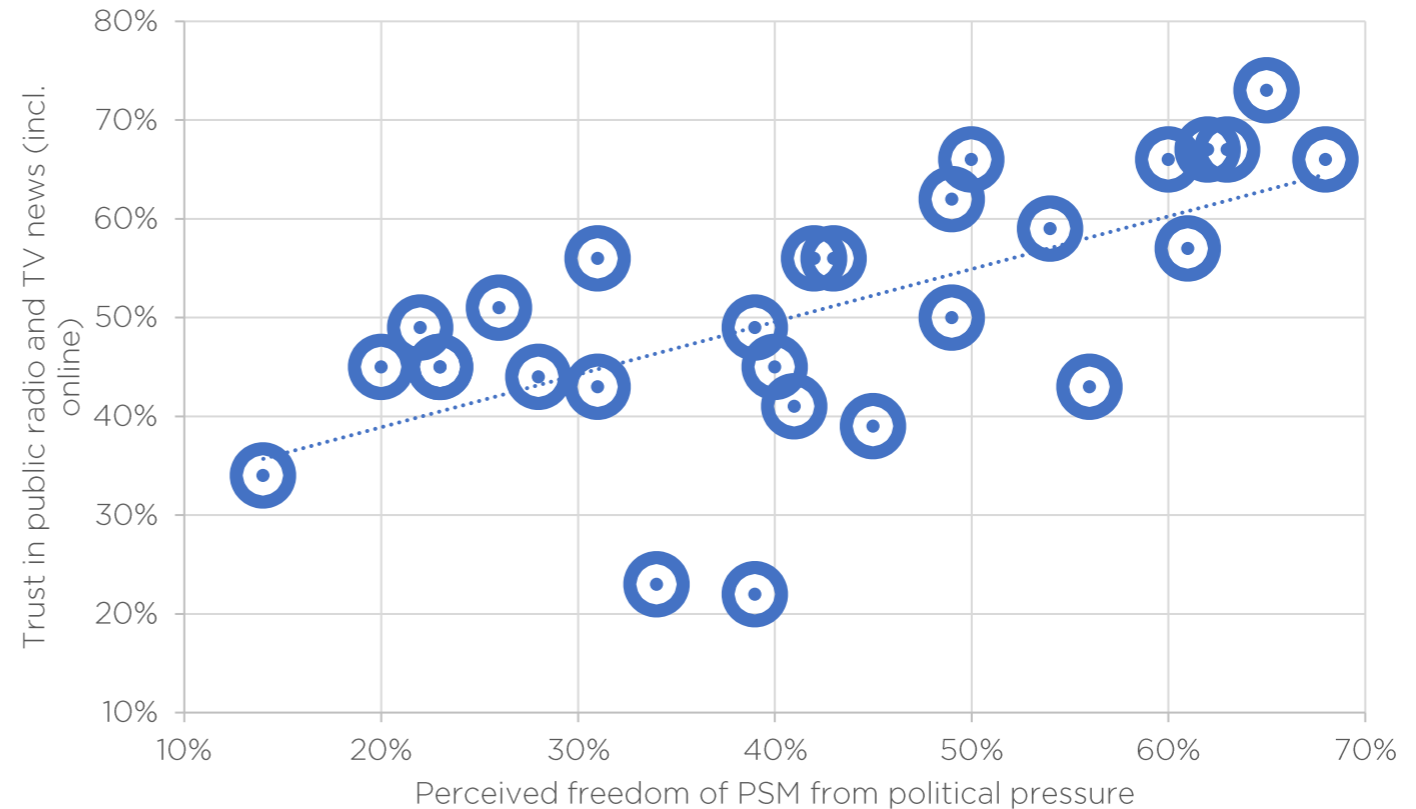


Strong positive correlation
Correlation coefficient: 0.84
 $p < 0.001$

- The more a country's citizens perceive PSM news as trustworthy, 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.
- Among the EU27 Member States, press freedom is lowest in Greece and highest in Denmark, according to the Reporters Without Borders World Press Freedom Index.

**THE MORE
CITIZENS
PERCEIVE THEIR
PSM TO BE FREE
FROM PRESSURE,
THE GREATER
THEIR TRUST**

PERCEIVED PRESSURE ON PSM vs TRUST IN PUBLIC RADIO AND TV

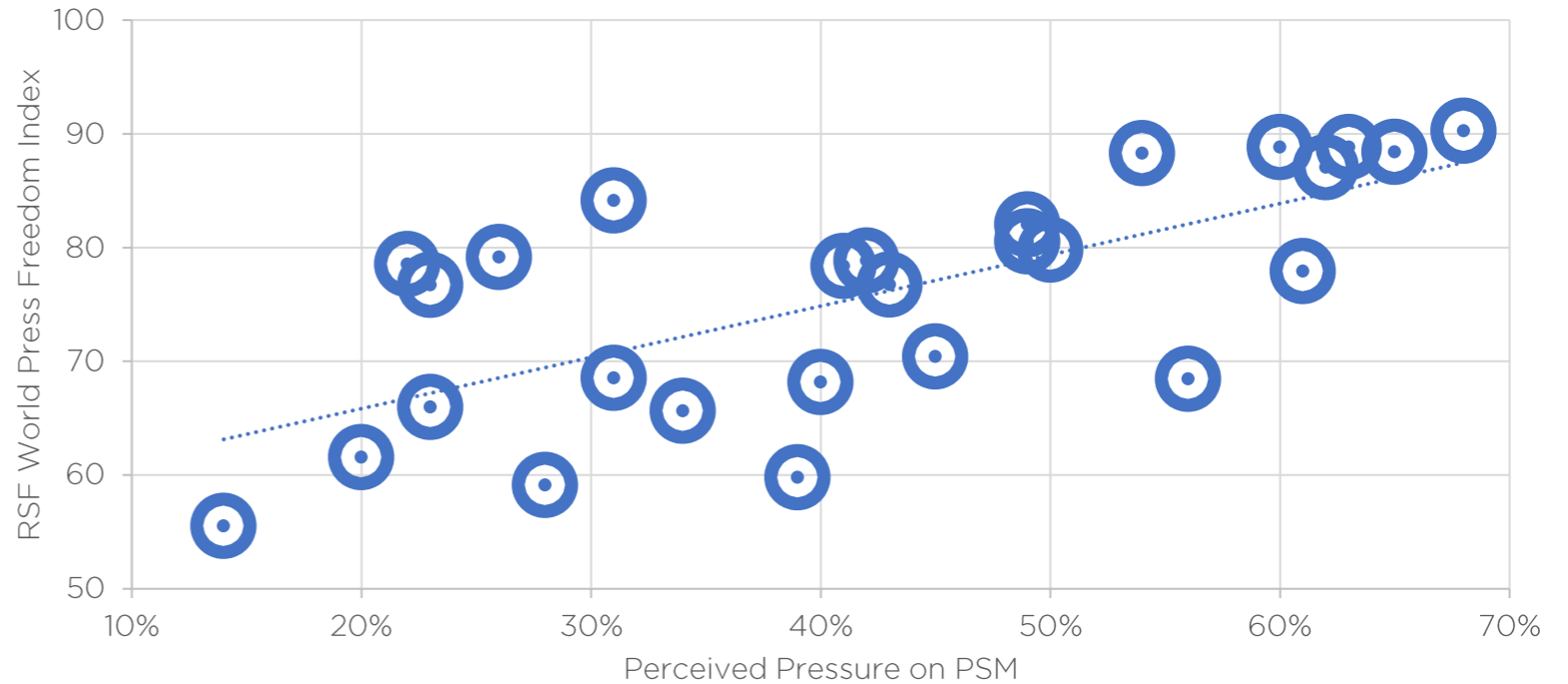


Strong positive correlation
Correlation coefficient: 0.64
 $p < 0.001$

- The more citizens think of their national PSM as being free from political pressure, the greater trust they place in public radio, TV and online news.
- This correlation might indicate that citizens appear to value strong PSM organizations that are capable of performing their tasks free from political control and undue influence, in turn perceiving the news they get from PSM radio and TV as trustworthy.

LOW PERCEIVED PRESSURE ON PSM COMES ALONG WITH GREATER PRESS FREEDOM

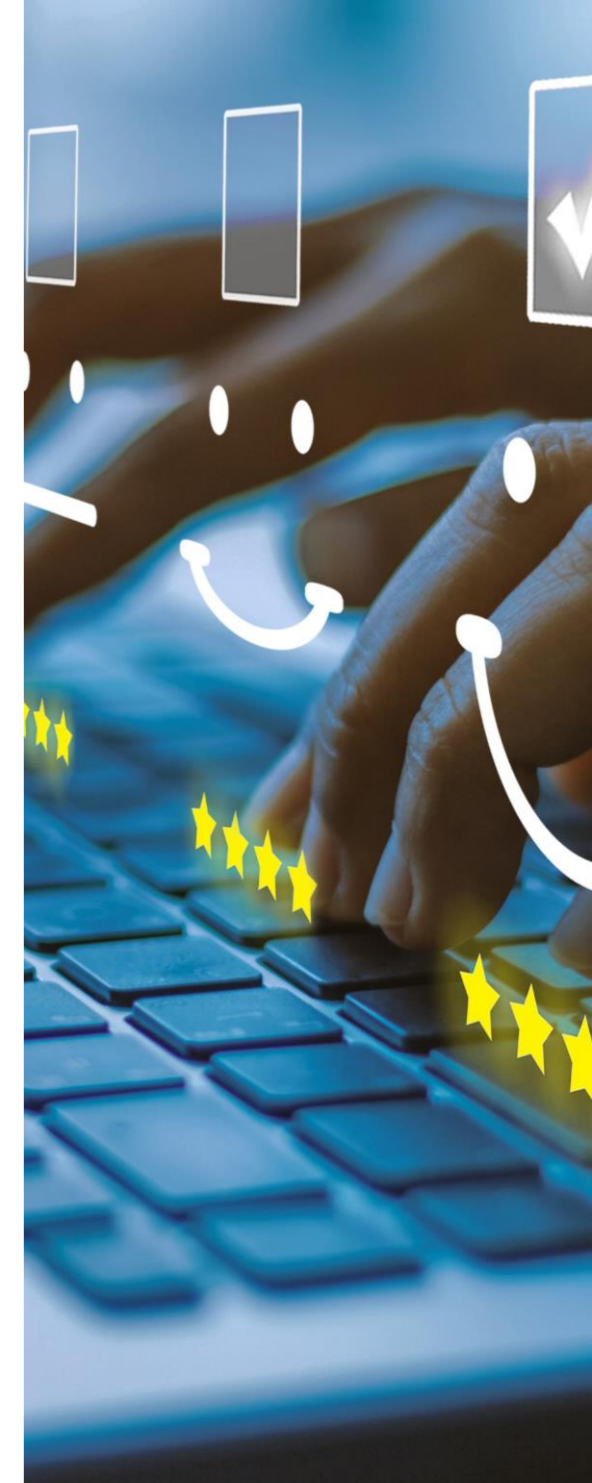
TRUST IN INDEPENDENCE OF NATIONAL PSM vs PRESS FREEDOM



Strong positive correlation
Correlation coefficient: 0.69
 $p < 0.001$

- The lesser the degree to which citizens see their public broadcaster under political pressure, the greater the degree of press freedom in a country.
- Potentially, this reflects the importance of strong and independent public broadcasters in furthering the freedom and independence of national media landscapes.
- We may describe citizens' perceptions of political pressure on PSM as the degree of trust and confidence they place in these organizations as being independent of undue political influence in terms of programming, funding and governance.

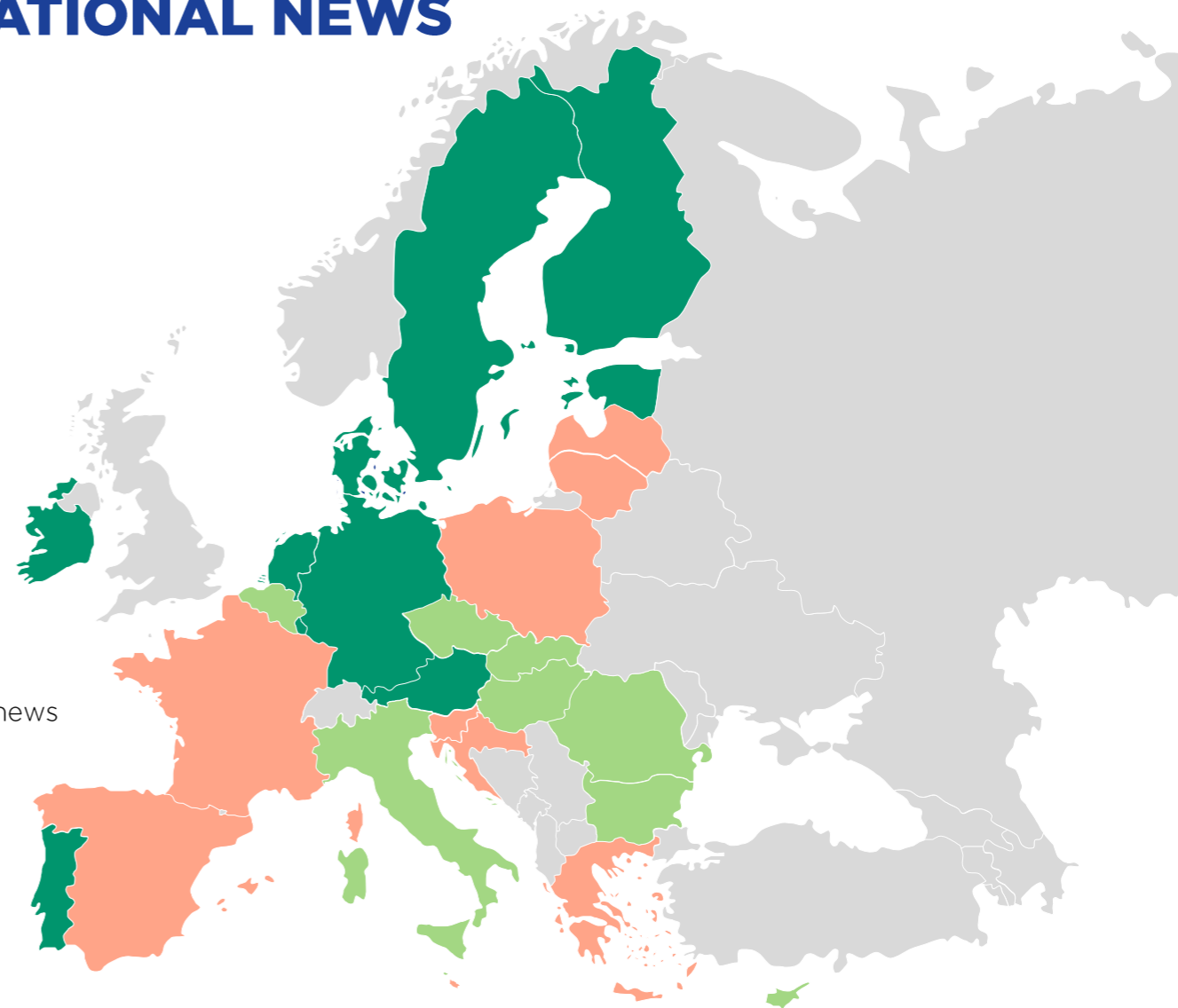
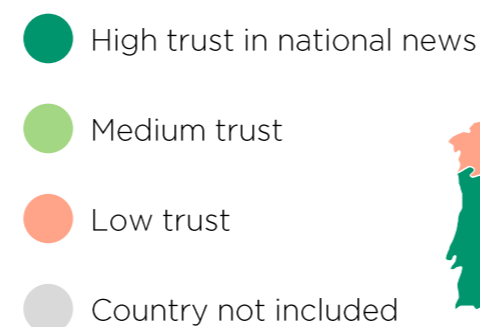
HOW TRUST IN PSM RELATES TO HEALTHY MEDIA ECOSYSTEMS



TRUST IN NATIONAL NEWS IS HIGHEST IN THE NORDICS

TRUST IN NATIONAL NEWS

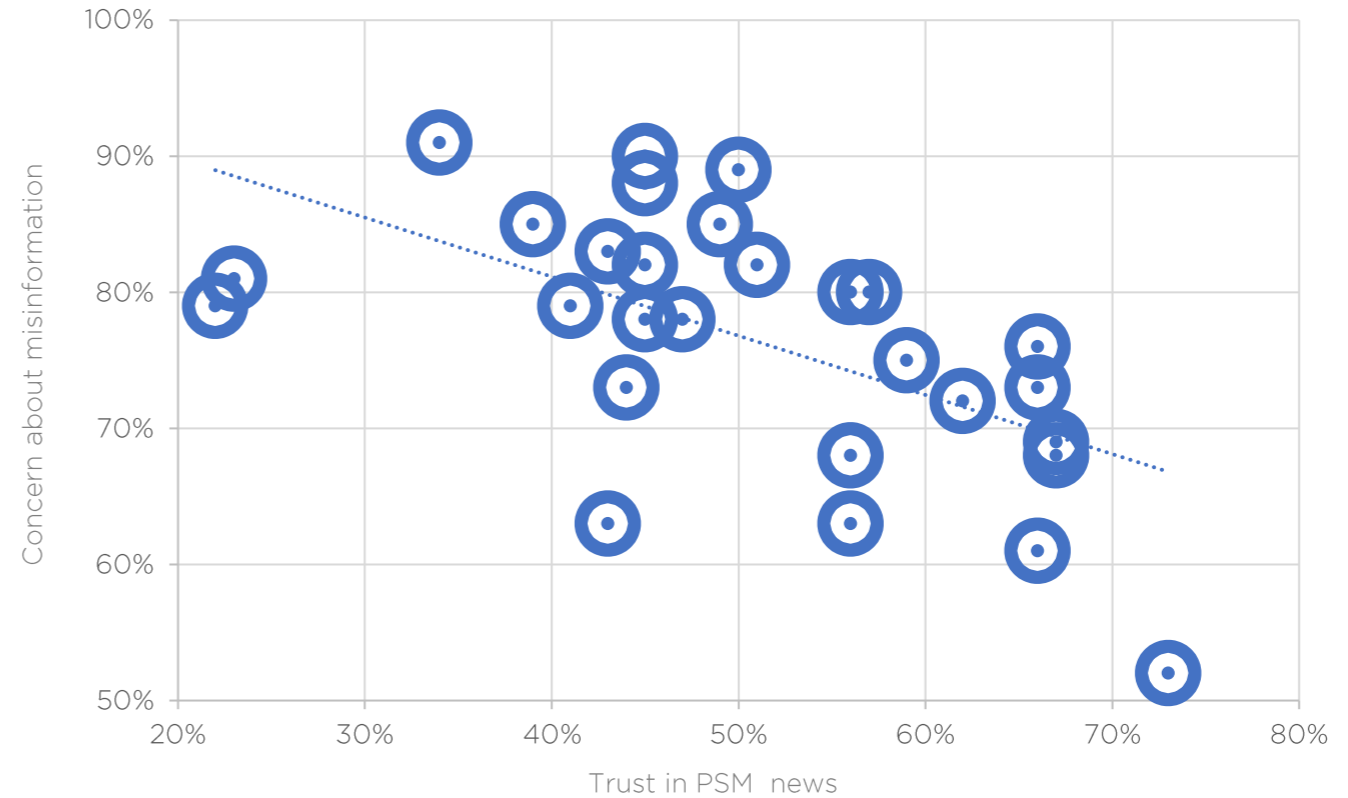
(2022)



- 18 out of the 27 EU Member States (67%) show a medium or high level of trust in national news, meaning that at least half of their population agrees that their national media provide trustworthy information. In 10 countries, even 70% of the population or more are convinced that their national media provide trustworthy information. Trust in news is highest in Finland (87%), Denmark (86%), Sweden (82%) and the Netherlands (81%).
- Notably, 2 of the “Big 4” EU markets have low levels of trust in the information provided by national media: Spain and France. Across EU Member States, trust in news is lowest in France (41%), Greece (42%), Slovenia (43%), Malta (44%), as well as Spain and Poland (47% respectively).

THE MORE CITIZENS TRUST IN PSM, THE FEWER OF THEM ARE CONCERNED ABOUT MISINFORMATION

TRUST IN PUBLIC RADIO AND TV vs CONCERN ABOUT MISINFORMATION

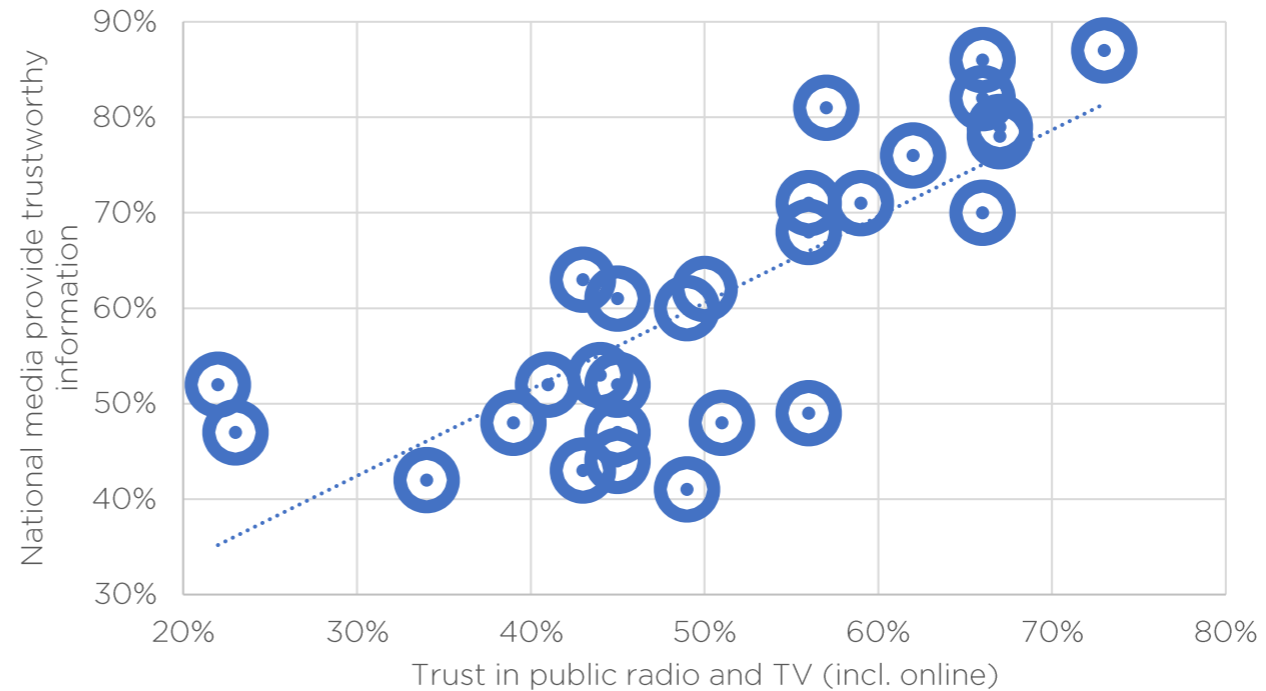


Moderate negative correlation
Correlation coefficient: -0.59
 $p < 0.01$

- The negative correlation indicates that the greater the level of trust in national public radio and TV, the fewer the number of citizens who perceive misinformation as a problem in their country. Credible and trustworthy PSM news may thus contribute to citizens' positive assessment of the broader media ecosystem around them.
- However, levels of concern about misinformation are relatively high across all of Europe, potentially reflecting awareness about the debate on “fake news” and false claims spreading via digital platforms. Concern is highest in Greece (91%) and lowest in Finland (52%). On average in the EU, 78% believe that misinformation is a problem.

A TRUSTED NEWS LANDSCAPE GOES HAND IN HAND WITH CREDIBLE PSM

TRUST IN PSM NEWS vs TRUST IN NATIONAL NEWS IN GENERAL

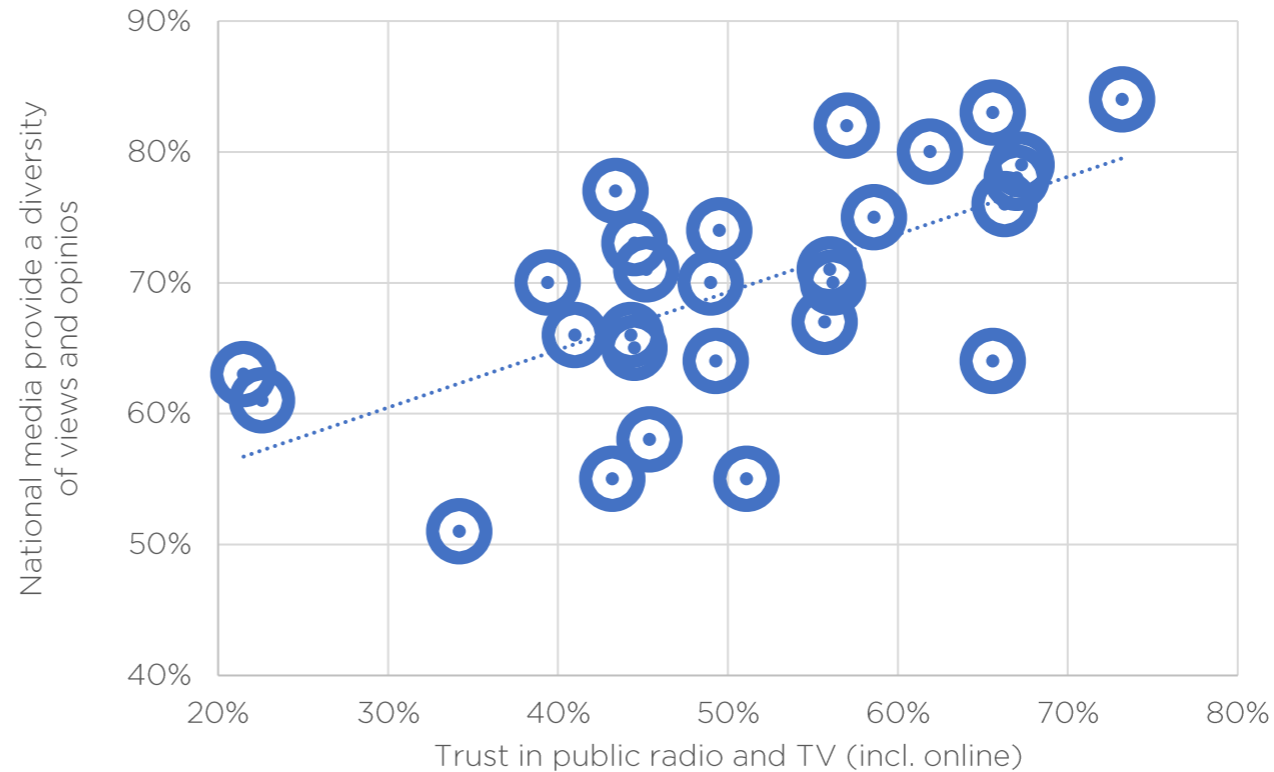


Strong positive correlation
Correlation coefficient: 0.79
 $p < 0.001$

- The more citizens perceive PSM news as trustworthy, the greater the trust they put in information provided by national news media outlets in general.
- This may reflect [findings from research](#) pointing towards *spillover effects* from PSM performance to commercial media and citizens' perceptions of the media system in general: The stronger PSM are, the more competitors adapt to their high standards. This kind of *race to the top*, with PSM as trendsetters, may be contributing to citizens' trust in news media overall.

TRUST IN PSM NEWS vs DIVERSITY OF OPINIONS IN NATIONAL MEDIA

THE GREATER THE TRUST IN PSM, THE HIGHER THE SATISFACTION WITH OPINION DIVERSITY

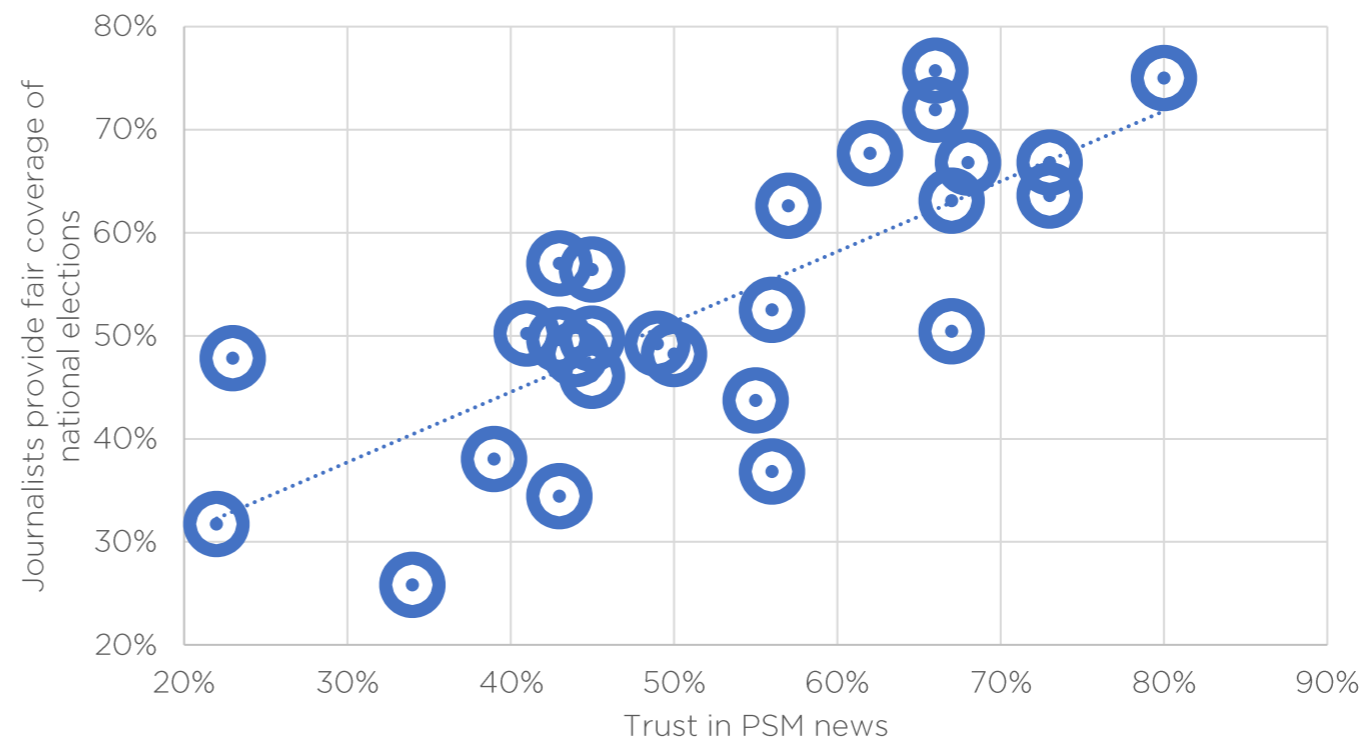


Strong positive correlation
Correlation coefficient: 0.64
 $p < 0.001$

- The more citizens perceive PSM news as trustworthy, the greater the satisfaction with the diversity of views and opinions provided by national media in general. Again, this may point to the significance of strong PSM in fostering a media landscape that is perceived as fair, diverse and balanced.
- In all EU countries, more than half of the population thinks of their news media as covering diverse opinions, with the lowest figure (51%) in Greece and the highest figure (84%) in Finland. On average in the EU, 70% of citizens are satisfied with the diversity of viewpoints covered in the media.

THE GREATER TRUST IN PSM, THE MORE CITIZENS PERCEIVE ELECTION REPORTING AS FAIR

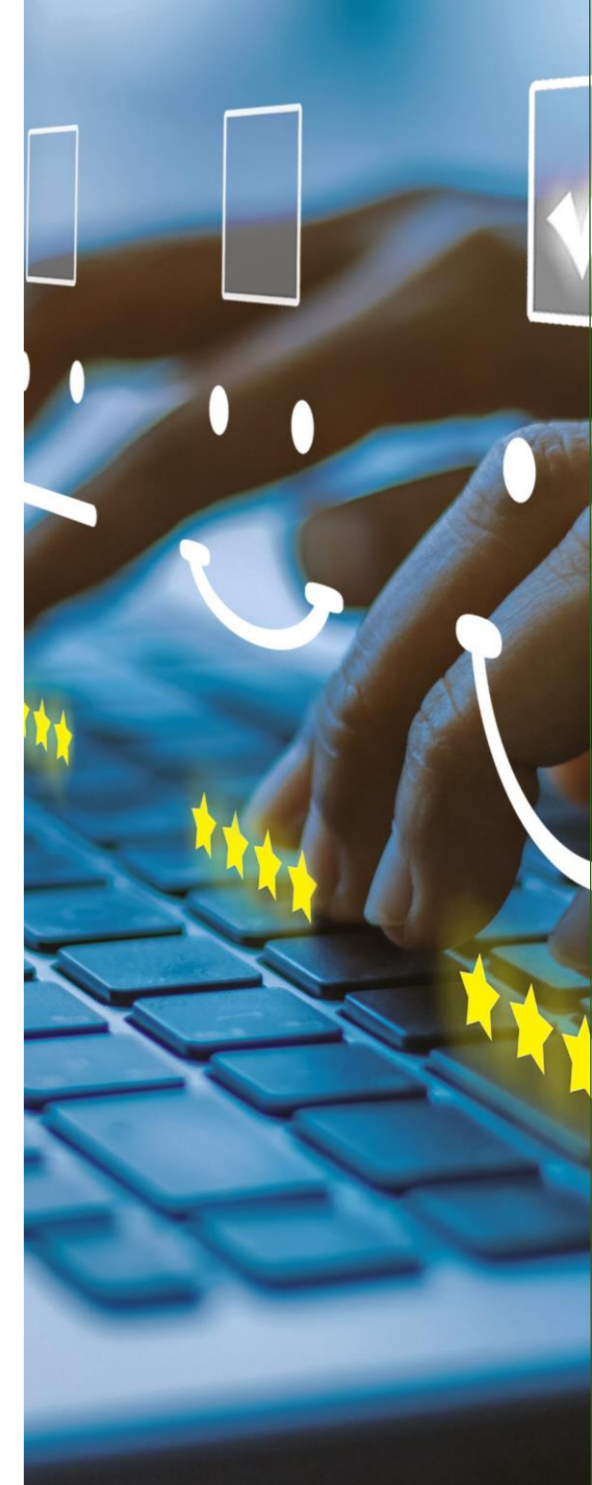
TRUST IN PSM vs FAIRNESS OF ELECTION COVERAGE



Strong positive correlation
 Correlation coefficient: 0.76
 $p < 0.001$

- Elections have proven to be particularly vulnerable to misinformation efforts and “fake news” campaigns in a range of countries, as well as to undue partisan influence on the news media. This positive correlation suggests that the greater the trust in PSM news in a country, the more of its citizens perceive news coverage of elections to be generally fair.
- This may point to a positive impact of PSM on citizens’ overall perceptions of national news media landscapes and to their influence on the editorial standards of other media.

APPENDIX



METHODOLOGY OF NATIONAL SURVEYS

Country	Member	Data Source	Methodology	Fieldwork
Belgium FL	VRT	VRT / DataSynergy: VRT Vertrouwensbarometer (VRT Trust Barometer)	Online survey with ca 2,000 respondents representative of the population 12+	November 2021
Denmark	DR	DR / Megafon: Public Service Image Study	Online survey with ca 1,000 respondents representative of the population 15+	Spring 2022
Estonia	ERR	Turu-uuringute AS (third party)	Combination of online and telephone survey with ca 1,000 respondents representative of the population 15+	November 2021
Finland	Yle	Yle / IRO Research Oy	Yle's value for Finns: telephone survey with ca 1,000 respondents representative of population the 15-79, Trust in news: online survey with 1,000 respondents representative of population 15+	Fall 2021
Germany	ARD / ZDF	ZDF / Forschungsgruppe Wahlen: ZDF Politbarometer WDR / Infratest dimap: Glaubwürdigkeit der Medien 2020 (Trustworthiness of media 2020)	Telephone survey with ca 1,400 respondents representative of the population 16+ Telephone survey with ca 1,000 respondents representative of the population 18+	April 2022 September-October 2020
Iceland	RÚV	RÚV / Maskina	Online survey with ca 950 respondents representative of the population 18+	May 2022
Norway	NRK	NRK Profile Survey / Norstat	Telephone survey with ca 1,800 respondents quarterly, representative of the population 15+	Q1 2022
Sweden	SR / SVT	SOM (Society, Opinion, Media) Study, SOM Institute, Gothenburg University (third party)	Postal and online survey with ca 24,500 respondents representative of the population 16-85	September-December 2021
UK	BBC	BBC / Ipsos Mori	Online survey with ca 1,000 respondents representative of the population 18+	March 2022

REFERENCES

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Reuters Institute (2022): *Digital News Report 2022* (by Nic Newman, Richard Fletcher, Craig T. Robertson, Kirsten Eddy and Rasmus Kleis Nielsen)

ACADEMIC ARTICLES

Mario Schranz et al. (2018), *Media Trust and Media Use*, in Kim Otto and Andreas Köhler (eds.), *Trust in Media and Journalism. Empirical Perspectives on Ethics, Norms, Impacts and Populism in Europe*, Springer VS

Yarif Tsfati and Gal Ariely (2014), *Individual and Contextual Correlates of Trust in Media Across 44 Countries*, *Communication Research*, 41:6, 760-782

DATABASES

Standard Eurobarometer datasets

Flash Eurobarometer FL011EP: Media & News Survey 2022 dataset

EBU Trust in Media dataset

COUNTRY CODES

AL - Albania

AT - Austria

BA - Bosnia and Herzegovina

BE - Belgium

BG - Bulgaria

CY - Cyprus

CZ - Czechia

CH - Switzerland

DE - Germany

DK - Denmark

EE - Estonia

ES - Spain

FI - Finland

FR - France

GR - Greece

HR - Croatia

HU - Hungary

IE - Ireland

UK - United Kingdom

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

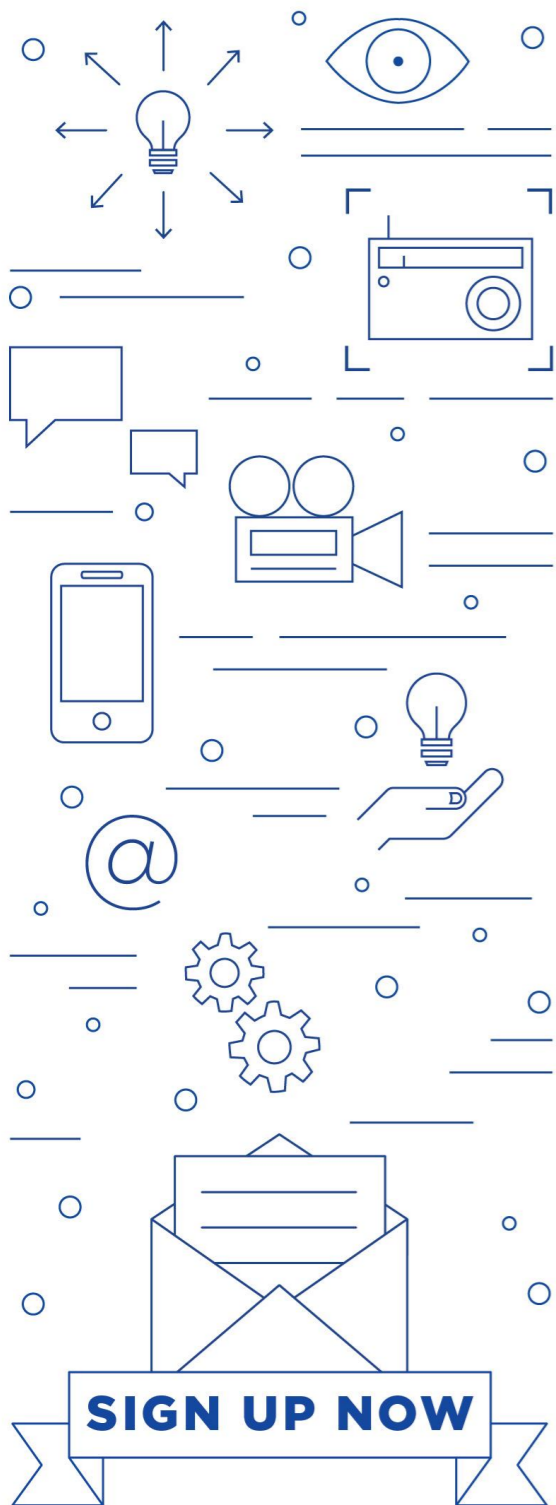
RS - Serbia

SE - Sweden

SI - Slovenia

SK - Slovakia

TR - Türkiye



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TRUST IN MEDIA 2022

Read this new report to find out more about which media Europeans consider more trustworthy.

[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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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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