



# Special Eurobarometer 452

## Summary

### Media pluralism and democracy

Fieldwork

September-October 2016

Publication

November 2016

Survey requested by the European Commission,  
Directorate-General for Justice and Consumers  
and co-ordinated by the Directorate-General for Communication

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The interpretations and opinions contained in it are solely those of the authors.

Special Eurobarometer 452 – Wave EB86.1 – TNS opinion & social





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(DG COMM "Strategy, Corporate Communication Actions and Eurobarometer" Unit)

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## INTRODUCTION

Free media and a plurality of voices in society and in the media are indispensable preconditions of, and essential safeguards for a healthy democracy. Freedom of expression and media freedom and pluralism are enshrined in Article 11 of the Charter of Fundamental rights of the European Union. They are at the core of the basic democratic values on which the Union is founded<sup>1</sup>. The importance of these basic tenets is further underlined by the EU Human Rights Guidelines on Freedom of Expression Online and Offline, adopted in 2014<sup>2</sup>.

In light of the importance of media plurality and freedom, the Directorate General for Justice and Consumers commissioned the following Eurobarometer survey to explore citizen's opinions about the diversity of views available in the media, and their perceptions of media independence. In particular, the survey covers the following areas:

- Views about the variety of opinions and views presented in the media;
- Perceptions of the independence of both the general and public service media;
- Trust in the information provided by the media;
- Awareness of the national media regulator, and opinions about its independence;
- Participation in debates on social media;
- Online encounters with hate speech and threats, and the influence this has on participation.

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<sup>1</sup> <https://ec.europa.eu/digital-single-market/en/about-media-freedom-pluralism>

<sup>2</sup> [http://www.consilium.europa.eu/uedocs/cms\\_data/docs/pressdata/EN/foraff/142549.pdf](http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/EN/foraff/142549.pdf)

This survey was carried out by TNS Political & Social network in the 28 Member States of the European Union between the 24<sup>th</sup> of September and 3<sup>rd</sup> of October 2016. Some 27,768 EU citizens from different social and demographic categories were interviewed face-to-face at home and in their native language on behalf of the Directorate-General for Justice and Consumers (DG-JUST). The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication (“Strategy, Corporate Communication Actions and Eurobarometer” Unit)<sup>3</sup>. A technical note concerning the interviews conducted by the member institutes of the TNS Opinion & Social network is annexed to this summary. It also specifies the interview methods and the confidence intervals<sup>4</sup>.

**Note:** In this summary, countries are referred to by their official abbreviation. The abbreviations used in this summary correspond to:

Belgium	BE	Lithuania	LT
Bulgaria	BG	Luxembourg	LU
Czech Republic	CZ	Hungary	HU
Denmark	DK	Malta	MT
Germany	DE	The Netherlands	NL
Estonia	EE	Austria	AT
Ireland	IE	Poland	PL
Greece	EL	Portugal	PT
Spain	ES	Romania	RO
France	FR	Slovenia	SI
Croatia	HR	Slovakia	SK
Italy	IT	Finland	FI
Republic of Cyprus	CY *	Sweden	SE
Latvia	LV	United Kingdom	UK
European Union – weighted average for the 28 Member States			EU28

\* Cyprus as a whole is one of the 28 European Union Member States. However, the ‘acquis communautaire’ has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the ‘CY’ category and in the EU28 average.

*We wish to thank the people throughout the European Union  
who have given their time to take part in this survey.*

*Without their active participation, this study would not have been possible.*

<sup>3</sup> <http://ec.europa.eu/COMMFrontOffice/PublicOpinion/>

<sup>4</sup> The results tables are included in the annex. It should be noted that the total of the percentages in the tables of this summary may exceed 100% when a respondent has the possibility of giving several answers to the question.

## I. EUROPEANS AND THEIR MEDIA

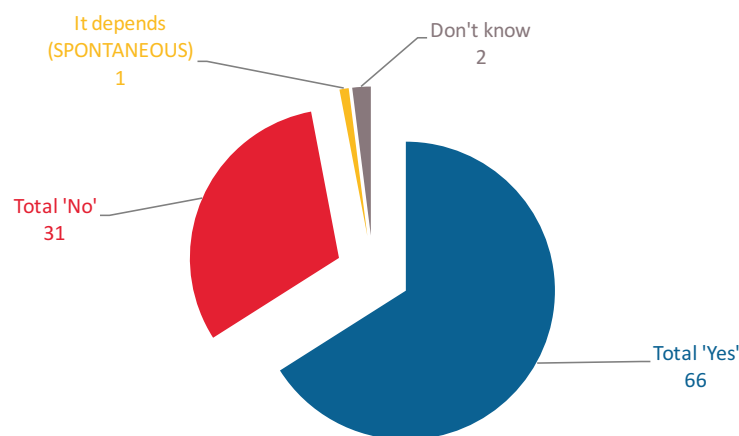
The first part of this summary explores the relationship Europeans have with their national media. Respondents' opinions about the diversity of views presented in the media are discussed, as well as their perceptions of media independence. Finally, their level of trust in various media is considered.

### 1 Variety of information in the media

#### - Two-thirds of respondents agree that their national media provide a diversity of views and opinions -

The majority of respondents (66%) agree their national media provide a diversity of views and opinions<sup>5</sup>. Just under one third (31%) say it does not, while 2% of respondents say they do not know.

**QC1.2** For each of the following statements, please tell me to what extent it corresponds or not to the situation of the (NATIONALITY) media:  
(NATIONALITY) media provide a diversity of views and opinions (% - EU)



Total base (N=27,768)

In 27 Member States, the majority of respondents agree their national media provide a diversity of views and opinions, with respondents in Finland (85%), the Netherlands (84%) and Denmark (82%) the most likely to agree. The exception is Greece, where 48% agree.

<sup>5</sup> QC1.2 For each of the following statements, please tell me to what extent it corresponds or not to the situation of the (NATIONALITY) media: (NATIONALITY) media provide a diversity of views and opinions

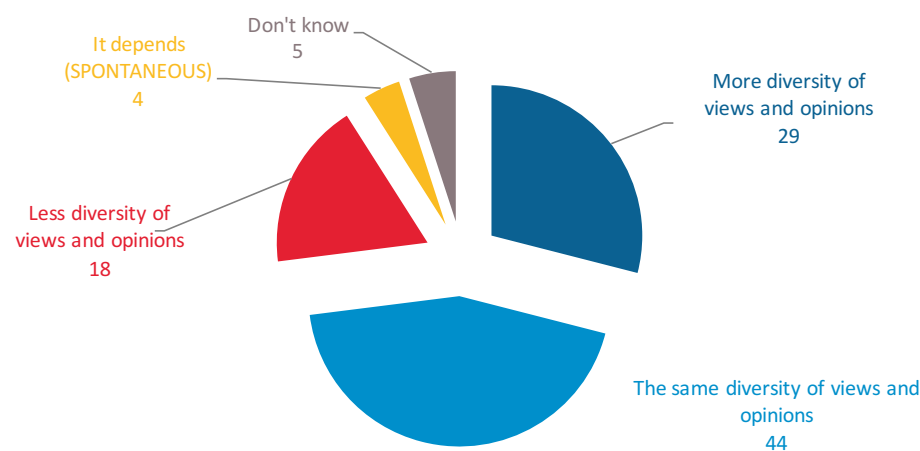


**- Almost three in four respondents say national media are providing the same or more diversity of views and opinions, compared to five years ago -**

The majority of respondents think their national media provide a diversity of views and opinions, and more than four in ten (44%) say the level of diversity is the same as it was five years ago<sup>6</sup>.

Almost three in ten respondents (29%) think their national media are providing more diversity of views and opinions now, while 18% say they are providing less diversity. No more than one in twenty says they do not know (5%), or that it depends (4%).

**QC3** Do you think that, in general, compared with five years ago, (NATIONALITY) media (printed, audio-visual, online etc.) are now providing:  
(% - EU)



Total base (N=27,768)

In 22 Member States, respondents are most likely to say national media provide **the same diversity of views and opinions** compared to five years ago, although the Czech Republic, Croatia (both 56%), Slovakia (54%), Luxembourg and Romania (50%) are the only countries where at least half think this way. Respondents in Cyprus (32%), the Netherlands (35%) and Estonia (36%) are the least likely to say the level of diversity is the same.

Respondents in Malta, Cyprus (both 47%) and the Netherlands (44%) are the most likely to say their national media are providing **more diversity** compared to five years ago. Overall, there are six countries where respondents are most likely to give this answer: Cyprus, Malta, the Netherlands, Ireland (42%), Sweden and Estonia (both 39%). Respondents in Greece (17%), the Czech Republic (19%) and Germany (21%) are the least likely to say there is more diversity now.

Respondents in Greece (28%), France (25%) and Hungary (23%) are the most likely to say their national media are providing **less diversity of views and opinions**, compared to five years ago. In contrast, respondents in Portugal (4%), Luxembourg (8%), Romania and Malta (both 9%) are the least likely to say this.

<sup>6</sup> QC3 Do you think that, in general, compared with five years ago, NATIONALITY) media (printed, audiovisual, online etc.) are now providing: More diversity of views and opinions; the same diversity of views and opinions; less diversity of views and opinions; it depends (SPONTANEOUS)

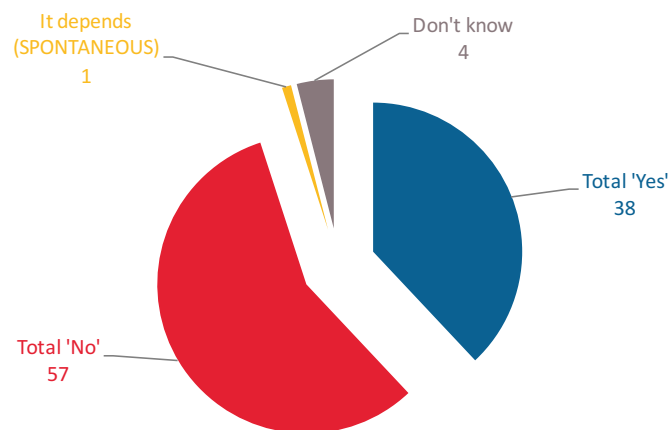
## 2 Are the media independent?

### a. Independence of the general media

#### - A minority of respondents say their national media provide information free from political or commercial pressure -

Almost four in ten respondents (38%) agree their national media provide information free from political or commercial pressure. However, the majority (57%) do not agree. Less than one in twenty respondents (4%) says they do not know.

**QC1.3** For each of the following statements, please tell me to what extent it corresponds or not to the situation of the (NATIONALITY) media:  
(NATIONALITY) media provide information free from political or commercial pressure (% - EU)



Total base (N=27,768)

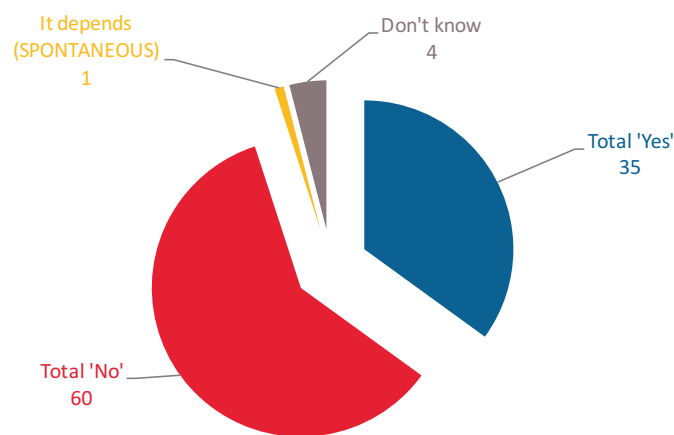
In nine Member States, majorities agree their national media provide information free from political or commercial pressure. In Finland (78%), the Netherlands and Denmark (both 61%) this view is the most prominent. At the other end of the scale, respondents in Greece (12%), Spain (24%) and Cyprus (25%) are the least likely to agree.

## b. Public service media independence

### - A minority think their national public service media are free from political pressure -

Just over a third of respondents agree **their national public service media** are free from political pressure (35%), but the majority (60%) disagree<sup>7</sup>. Less than one in twenty respondents (4%) say they do not know.

**QC1.4** For each of the following statements, please tell me to what extent it corresponds or not to the situation of the (NATIONALITY) media:  
(NATIONALITY) public service media are free from political pressure (% - EU)



Total base (N=27,768)

There are seven Member States where a majority of all respondents think their national public service media are free from political pressure: Finland (65%), Sweden, the Netherlands (both 55%), Denmark (54%), Germany, Slovakia (both 50%) and Portugal (47% vs. 44%). Respondents in Greece (9%), France (16%) and Spain (20%) are the least likely to agree.

<sup>7</sup> QC1.4 For each of the following statements, please tell me to what extent it corresponds or not to the situation of the (NATIONALITY) media: (NATIONALITY) public service media are free from political pressure

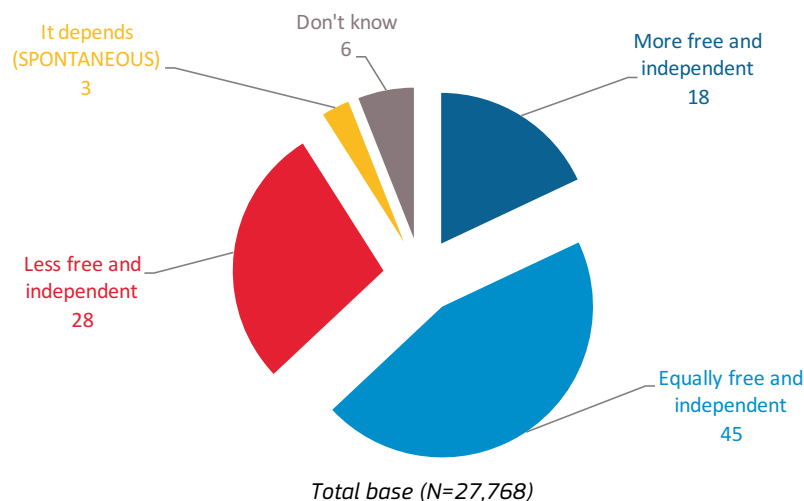
### c. Media independence today compared with five years ago

#### - The majority of respondents think their national media are at least as free and independent as they were five years ago -

Overall, 63% of respondents think their national media are at least as free and independent as they were five years ago: 18% say media are more free and independent, and 45% say it is equally free and independent.

Over one quarter (28%) think national media are less free and independent. Less than one in ten respondents think it depends (3%), or say they do not know (6%).

**QC2** Do you think that, in general, compared with five years ago, (NATIONALITY) media (printed, audio-visual, online etc.) are now:  
(% - EU)



In 27 Member States, respondents are most likely to think their national media are **equally free and independent** as they were five years ago, although there are only nine countries where at least half think this way. Those in Finland (59%), Croatia (56%) and Slovakia (53%) are the most likely to think the level of media independence is **the same** as five years ago, while those in Malta (30%), Cyprus (38%), Slovenia and Poland (both 39%) are the least likely to do so.

Malta (48%) is the only country where respondents are most likely to think their national media are now **more free and independent** than they were five years ago, although this view is also held by at least one third of those in Portugal (39%) and Ireland (35%). Respondents in Germany (9%), Greece and Hungary (both 12%) are the least likely to give this answer.

Respondents in France (38%), Greece and Hungary (both 37%) are the most likely to say their national media are **less free and independent**, while those in Portugal (6%), Luxembourg (14%) and Ireland (16%) are the least likely to say so.

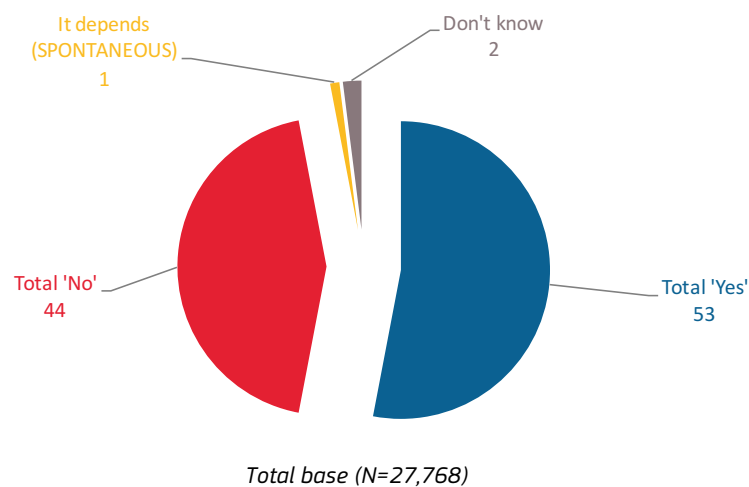
### 3 Trust in the media

#### - A slight majority agree their national media provide trustworthy information -

Most of respondents (53%) agree their national media provide trustworthy information, while 44% think it does not<sup>8</sup>. Only 2% of respondents say they do not know.

**QC1.1** For each of the following statements, please tell me to what extent it corresponds or not to the situation of the (NATIONALITY) media:

(NATIONALITY) media provide trustworthy information (% - EU)



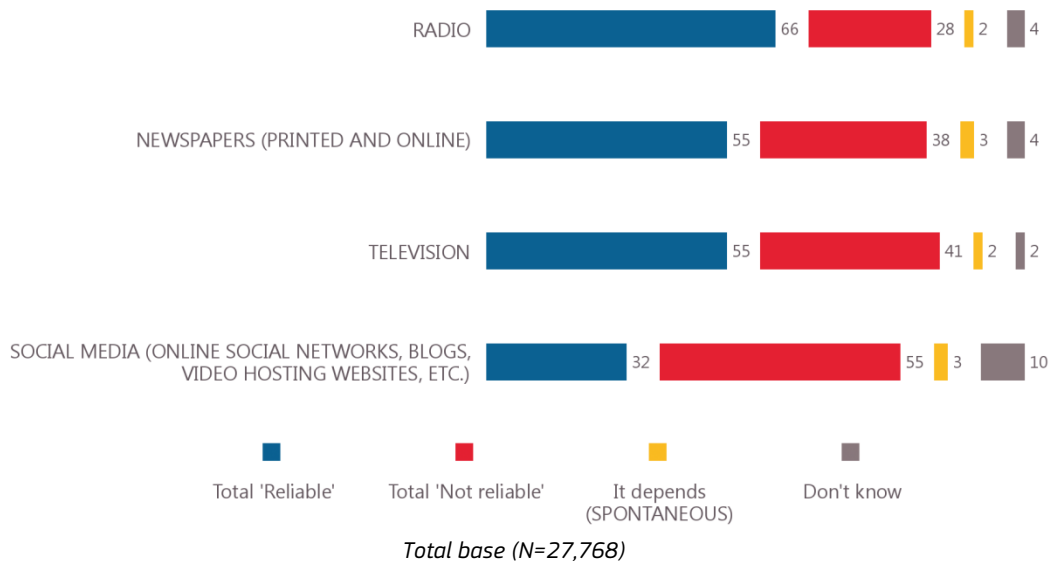
In 19 Member States, the majority of respondents agree their national media provide trustworthy information. Nearly nine in ten in Finland (88%) think this way, as do more than three quarters in Sweden and Denmark (both 77%). In contrast, respondents in Greece (26%), France (34%) and Spain (38%) are the least likely to agree.

<sup>8</sup> QC1.1 For each of the following statements, please tell me to what extent it corresponds or not to the situation of the (NATIONALITY) media: (NATIONALITY) media provide trustworthy information

### - Radio is considered the most reliable form of national media -

Respondents were asked about the reliability of various forms of national media<sup>9</sup>. Radio is most likely to be considered reliable (66%), followed by television and newspapers (both 55%). Far fewer respondents consider social media to be reliable (32%).

QC4 For each of the following (NATIONALITY) media, please tell me if you think it is reliable or not: (% - EU)



The country level results for each media type will be considered in turn below, but an overview shows **radio** is considered the most reliable media in 25 countries, and television in two countries. In Croatia, both radio and television are equally considered the most reliable media.

In 22 Member States, the majority of respondents think national **television** is reliable. Those in Finland (90%), Denmark (89%) and Sweden (82%) are the most likely to say this, compared to one in six respondents in Greece (16%), 31% in Spain and 41% in France.

In all but two Member States, the majority of respondents think radio is reliable, with respondents in Finland (93%), Denmark (91%) and Sweden (88%) the most likely to say this. The exceptions are Greece (40%) and Croatia (48%) – with Greece the only country where over half of respondents think radio is not reliable (56%).

In 21 countries, the majority of respondents consider **newspapers (printed and online)** to be reliable. More than eight in ten respondents in Finland (88%), Denmark (85%) and the Netherlands (83%) think this way, compared to one third in Greece (33%), 39% in Cyprus and 40% in Croatia.

In 22 Member States the majority say **social media** is not reliable: in particular, large majorities of respondents in Sweden (80%), the Netherlands (73%) and Finland (68%) think this way.

<sup>9</sup> QC4 For each of the following (NATIONALITY) media, please tell me if you think it is reliable or not: 4.1 Television; 4.2 Radio; 4.3 newspapers (print or online); 4.4 social media (online social networks, blogs, video hosting websites, etc.).

## II. THE NATIONAL BODY THAT OVERSEES AUDIOVISUAL MEDIA

This section of the summary focusses on the national body that oversees audiovisual media. Respondent's awareness of this body is considered, as well as their perceptions of its independence.

### 1 Awareness

Respondents were asked if they were aware of the body that oversees audiovisual media in their country<sup>10</sup>. Those who said they were aware were then asked for the name of the body.

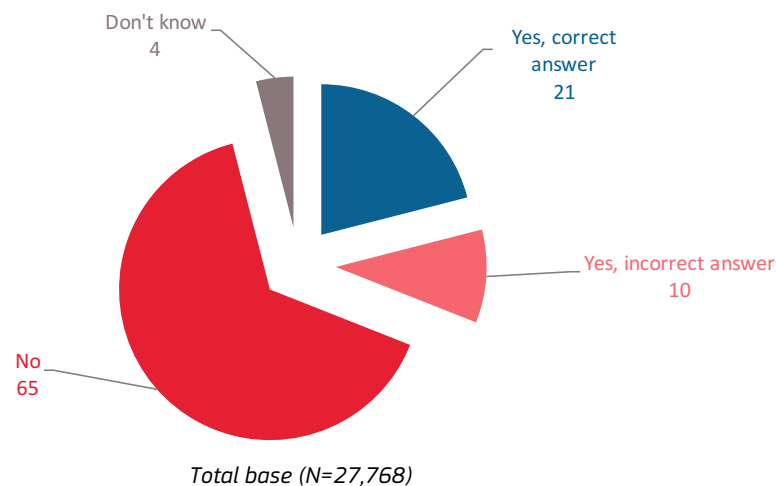
#### - Just over one in five respondents spontaneously give the correct name of the body that oversees audiovisual media in their country -

Overall, just over three in ten (31%) respondents say they are aware of the body that oversees audiovisual media in their country.

Around one EU citizen in five (21%) give the correct name of this body, with a further 10% giving an incorrect answer. The majority, however, say they are not aware of the body that oversees audiovisual media in their country (65%).

In total, close to eight in ten respondents either do not know, or give an incorrect answer (79%).

QC5 Are you aware of the body that oversees audio-visual media in your country?  
(% - EU)

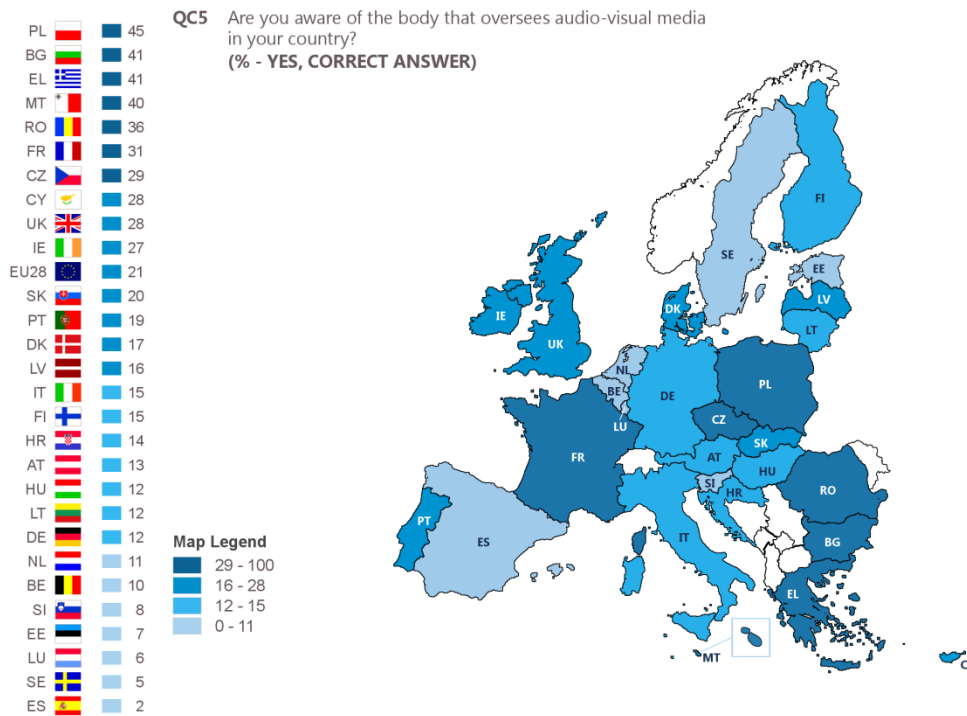


<sup>10</sup> As in Germany each region has a separate body overseeing audiovisual media, in this country respondents were asked about this body in their region.

In Belgium there is a different body that oversees audiovisual media in each linguistic community. If respondents in this country mentioned either of these bodies, it was treated as a correct answer.

The map illustrates that respondents in Eastern Member States are generally more likely to be able to name the body overseeing audiovisual media in their country.

In all Member States, less than half of respondents are able to name correctly the body that oversees audiovisual media in their country. However, important proportions give the correct answer in Poland (45%), Bulgaria and Greece (both 41%). At the other end of the scale just 2% in Spain, 5% in Sweden and 6% in Luxembourg can name the body responsible for audiovisual media in their country.



Total base (N=27,768)

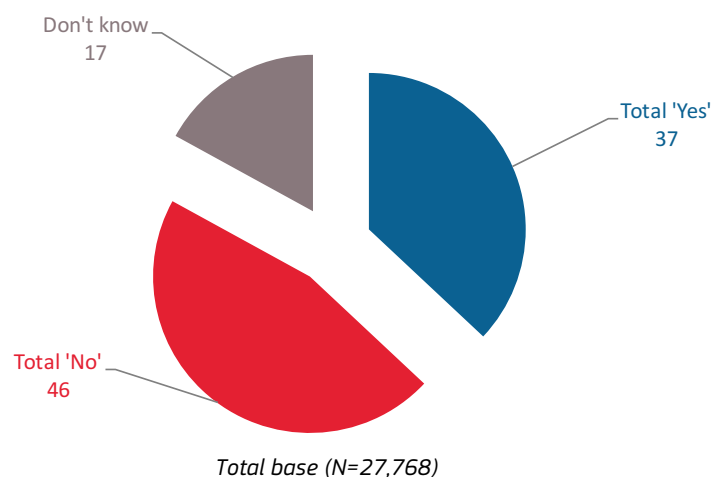


## 2 Perceived independence of the body that oversees audiovisual media

### - Only a minority of respondents agree the national media regulator is free and independent from political, governmental or commercial pressures -

Less than four in ten respondents (37%) think the body that oversees the audiovisual media in their country is free and independent from political, governmental or commercial pressures<sup>11</sup>. Nearly half of all respondents (46%) do not think the regulator is free and independent, while almost one in five respondents (17%) say they do not know<sup>12</sup>.

**QC6** Do you think that [NAME OF AUDIO-VISUAL NATIONAL MEDIA REGULATOR] is free and independent from political, governmental or commercial pressures?  
(% - EU)



There are eleven Member States where the majority of respondents agree the body that oversees the audiovisual media in their country is free and independent from political, governmental or commercial pressures. This view prevails mostly in Finland (76%), the Netherlands (67%), Denmark (56%), Sweden (55%) and Austria (51%).

At the other end of the scale, respondents in Spain (14%), Greece (19%) and Latvia (24%) are the least likely to think the regulator is free and independent.

Overall, the majority of respondents in seventeen Member States say the body overseeing audiovisual media in their country is not free and independent.

In four Member States – Estonia (37%), Luxembourg (27%), Bulgaria (27%) and Spain (25%), at least one in four respondents did not know if the body that oversees the audiovisual media is free and independent from political, governmental or commercial pressures

<sup>11</sup> QC6 Do you think that [NAME OF AUDIOVISUAL NATIONAL MEDIA REGULATOR] is free and independent from political, governmental or commercial pressures?

<sup>12</sup> As in Germany each region has a separate body overseeing audiovisual media, in this country respondents were asked about this body in their region.

In Belgium there is a different body that oversees audiovisual media in each linguistic community. Respondents were asked about the body operating in their linguistic community.

### III. ENCOUNTERS WITH HATE SPEECH AND THREATS ON SOCIAL MEDIA

This final section of the summary looks at the use of social media for debating different topics, and any experience participants have had with hate speech and threats on social media as part of these debates. The impact of these experiences on willingness to participate in debates is also discussed.

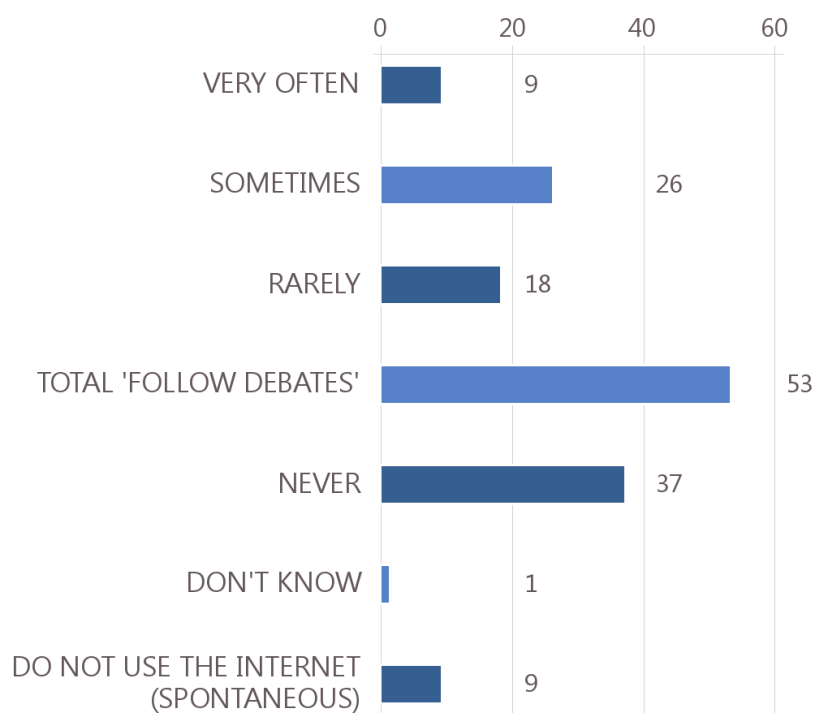
#### 1 Are Europeans following and directly participating in debates on social media?

##### - Just over half of all respondents follow debates on social media -

A majority of respondents (53%) follow debates on social media, for example, by reading articles on the Internet or through online social networks or blogs<sup>13</sup>. Less than one in ten respondents (9%) do this very often, while just over a quarter (26%) sometimes follow debates on social media and 18% rarely follow them.

More than one third of respondents (37%) never follow debates on social media, while almost one in ten respondents (9%) *spontaneously* say they do not use the Internet.

**QC7** Do you follow debates on social media, for example by reading articles on the Internet or through online social networks or blogs?  
(% - EU)



Total base (N=27,768)

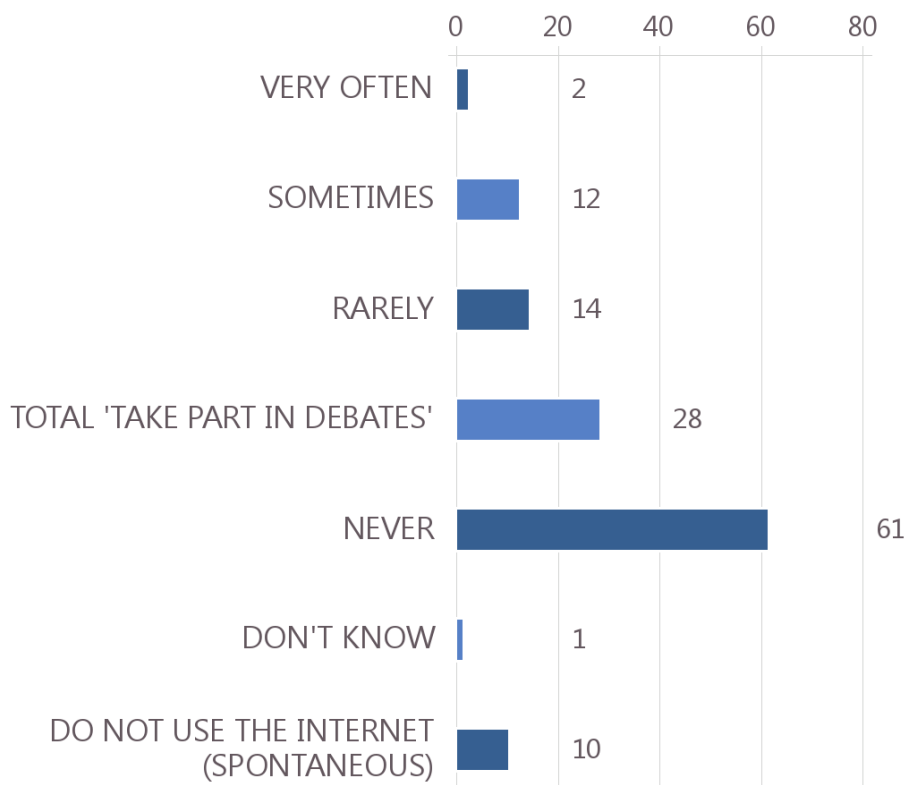
<sup>13</sup> QC7 Do you follow debates on social media, for example by reading articles on the Internet or through online social networks or blogs?

**- Just over one quarter of respondents take part in these debates -**

All respondents were asked if they took part in these debates, for example by posting comments on articles on the Internet, or through online social networks or blogs<sup>14</sup>. Only a minority (28%) say they do. Less than one in twenty respondents (2%) do it very often, 12% sometimes take part in those debates while 14% do it rarely.

The majority, however never take part in these debates (61%), while a tenth of respondents (10%) *spontaneously* say that they do not use the Internet.

**QC8** Do you also take part in those debates, for example by posting comments on articles on the Internet, or through online social networks or blogs?  
(% - EU)



Total base (N=27,768)

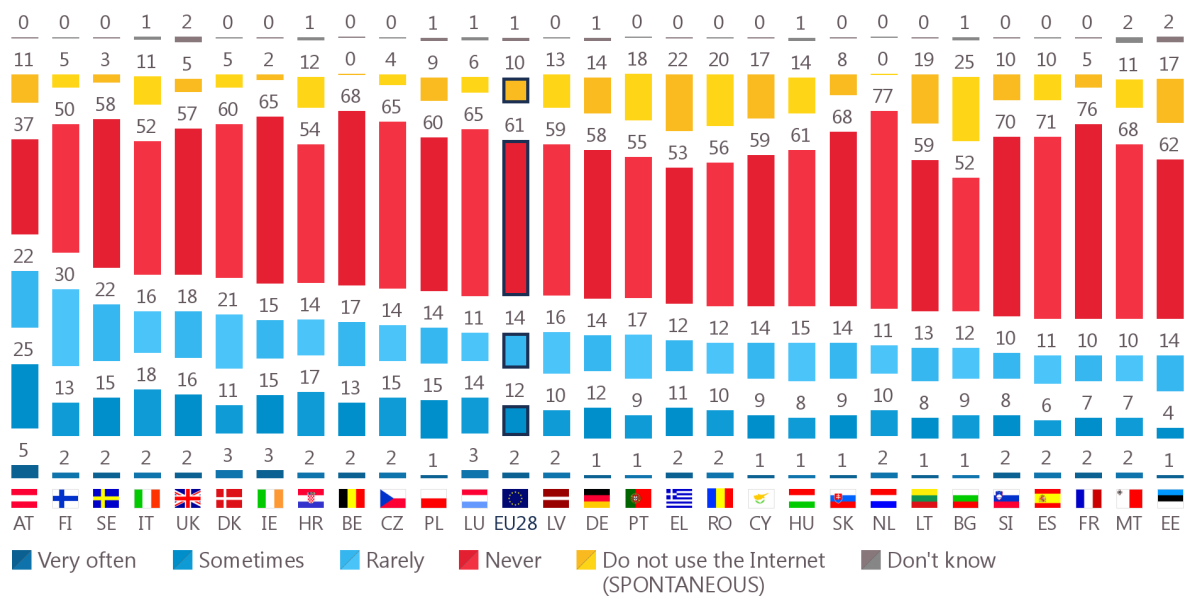
<sup>14</sup> QC8 Do you also take part in those debates, for example by posting comments on articles on the Internet, or through online social networks or blogs?

Austria is the only Member State where the majority of respondents take part in those debates by posting comments on articles on the Internet, or through online social networks or blogs (52%), followed by 45% in Finland and 39% in Sweden. At the other end of the scale, 19% of respondents in Estonia, Malta, Spain and France take part in such debates.

Only a very small minority of respondents in any Member State say they take part in these debates very often, with those in Austria the most likely to say so (5%).

In all countries except Austria, the majority of respondents say they do not take part in such debates.

**QC8** Do you also take part in those debates, for example by posting comments on articles on the Internet, or through online social networks or blogs?  
(%)



Total base (N=27,768)

## 2 Frequency of encounters with hate speech and threats on social media, and how this influences participation

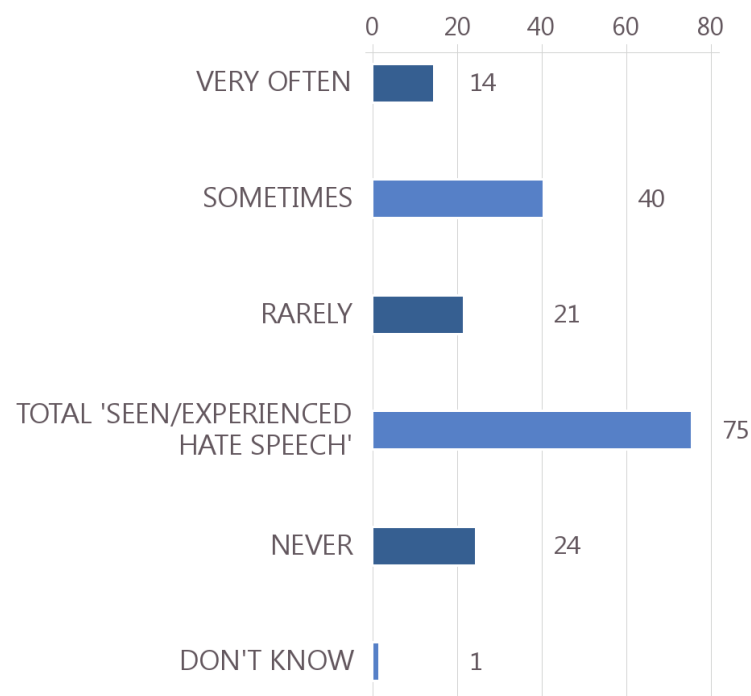
Respondents who follow or participate in debates on social media were asked if they have ever experienced cases where abuse, hate speech or threats were directed at journalists, bloggers, or people active on social media<sup>15</sup>.

### - Three quarters of these respondents have experienced abuse, hate speech or threats directed at journalists, bloggers or people active on social media -

A large majority of those who follow or participate in debates has heard, read, seen or themselves experienced cases where abuse, hate speech or threats are directed at journalists/bloggers/people active on social media (75%). Just over one in ten (14%) say they have experienced this very often, while 40% have experienced it sometimes. Just over one in five (21%) say they have rarely experienced this kind of abuse.

Just under a quarter of this group of respondents say they have never heard, read, seen or experienced this (24%).

**QC9** Have you ever heard, read, seen or yourself experienced cases where abuse, hate speech or threats were directed at journalists/bloggers/people active on social media?  
(% - EU)



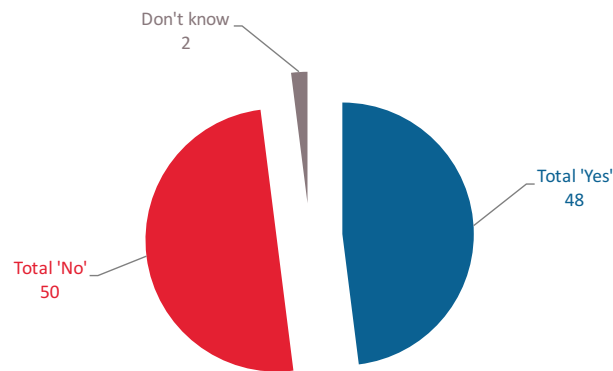
Base: respondents who follow or participate in debates (N=14,992)

<sup>15</sup> QC9 Have you ever heard, read, seen or yourself experienced cases where abuse, hate speech or threats were directed at journalists/bloggers/people active on social media?

### - Half of respondents say such cases do not make them hesitate to engage in such debates -

Respondents who have heard, read, seen or experienced cases of hate speech or threats on social media were then asked if such cases make them hesitate to engage in such debates<sup>16</sup>. Half (50%) say they do not, while 48% say that they do.

QC10 Do such cases make you hesitate to engage in such debates?  
(% - EU)



Base: respondents who have heard, read, seen or experienced cases of hate speech or threats on social media (N=11,176)

In 12 countries, the majority of respondents agree such cases make them hesitate to engage in such debates. Nearly six in ten in Estonia, Malta (both 59%), Ireland and Luxembourg (both 57%) say such cases make them hesitate to engage in such debates. In fact, more than one quarter of respondents in Estonia (30%) and Malta (29%) definitely agree.

<sup>16</sup> QC10 Do such cases make you hesitate to engage in such debates?

## CONCLUSION

The results of this survey paint a mixed picture of media pluralism and freedom across the European Union.

On the positive side, **the majority of respondents think their national media provide a diversity of views and opinions.** Furthermore, the majority in each Member State think this is the case. Most respondents also think the level of diversity is either the same as, or more than the level of five years ago. A small majority agree national media provide trustworthy information.

However, in spite of the diversity of the media, **the majority of respondents say neither their national or their public service media are free and independent.** Furthermore, almost three in ten think their national media are less free and independent than they were five years ago.

Media independence and trust in the information provided by the media often go hand in hand. In many countries, when a high proportion of respondents think their national media are free from political and commercial pressures, there are also high proportions of respondents who think the media provides trustworthy information. For example, this is the case in Finland, Denmark, Sweden and the Netherlands. The reverse is also true. In France, Greece, and Spain, for instance, respondents are much less likely to think their national media are free from political and commercial pressures, and they are much less likely to consider the national media provides trustworthy information.

While all Member States have a body to regulate audiovisual media, **just over one in five know their country's media regulator.** Furthermore, only a minority believe their media regulator is free and independent from political, governmental or commercial pressures.

**Just over half of respondents follow debates on social media by reading articles on the Internet, or through blogs or other social media.** Less than three in ten actively participate in them by posting comments and so on. For those who do participate, it is more likely to be an occasional rather than a regular occurrence.

**Amongst those who at least sometimes follow or participate in such debates, there is widespread experience of hate speech, threats or abuse directed against journalists, bloggers or people active on social media.** Three quarters say they have ever experienced this kind of behaviour, and more than one in ten say they often experience it. **For almost half, these experiences make them hesitant to engage in online debates.**

These results highlight that, in the eyes of Europeans, there is still considerable work to be done in ensuring the independence of national media – a vital cornerstone of a democratic EU. The widespread experience of hate speech, abuse and threats in online spaces also needs to be addressed to ensure all citizens feel free to safely express themselves in the online sphere.