

Trust in the Media

How do people across the world trust the news and information they receive from different sources?

How has trust changed over the last few years?

What role does fake news play?

How are public broadcasters perceived?

IPSOS GLOBAL ADVISOR

Key Findings

- People across 27 countries are divided on whether they trust traditional media (magazines and newspapers, TV and radio). These sources are equally trusted as they are distrusted.
- However, levels of trust in media sources vary greatly at the country level.
- Trust in traditional media is perceived to have decreased over the past five years. This survey shows two main contributing factors: the prevalence of fake news and doubts about media sources' good intentions.
- Online media websites are slightly less trusted than traditional media, but trust in them is not reported to have dropped as extensively over the past five years.
- Proximity to people matters. People are most trusting of other people they know them personally. Furthermore, personal relationships are the only source of news and information that is perceived to have gained in trustworthiness over the past five years.
- Opinions vary widely across countries as to whether public broadcasters can be trusted more than private ones, depending on how broadcasting services are organized and controlled.

Trust in News Sources

To what extent do people trust different sources of news and information?

IPSOS GLOBAL ADVISOR



GAME CHANGERS



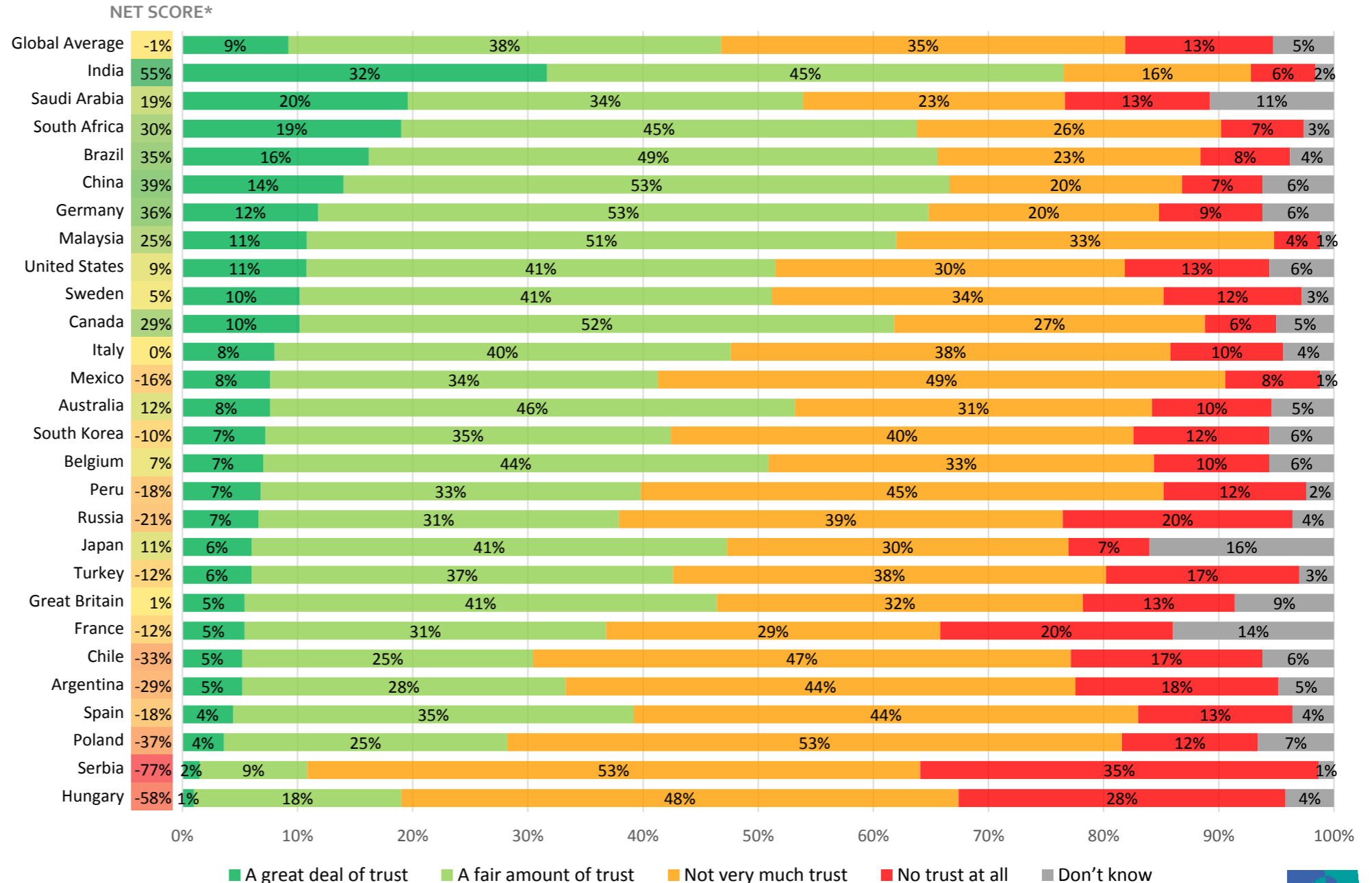
© 2019 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Ipsos.

TRUST IN NEWS SOURCES

- Trust in newspapers and magazines varies greatly across individual countries.
- Levels of trust are highest in India and lowest in Hungary and Serbia.

Q. To what extent, if at all, do you trust each of the following to be a reliable source of news and information?

NEWSPAPERS AND MAGAZINES



* A net score refers to % trust a great deal or a fair amount MINUS % do not trust very much or at all (here and on all other slides)
 Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

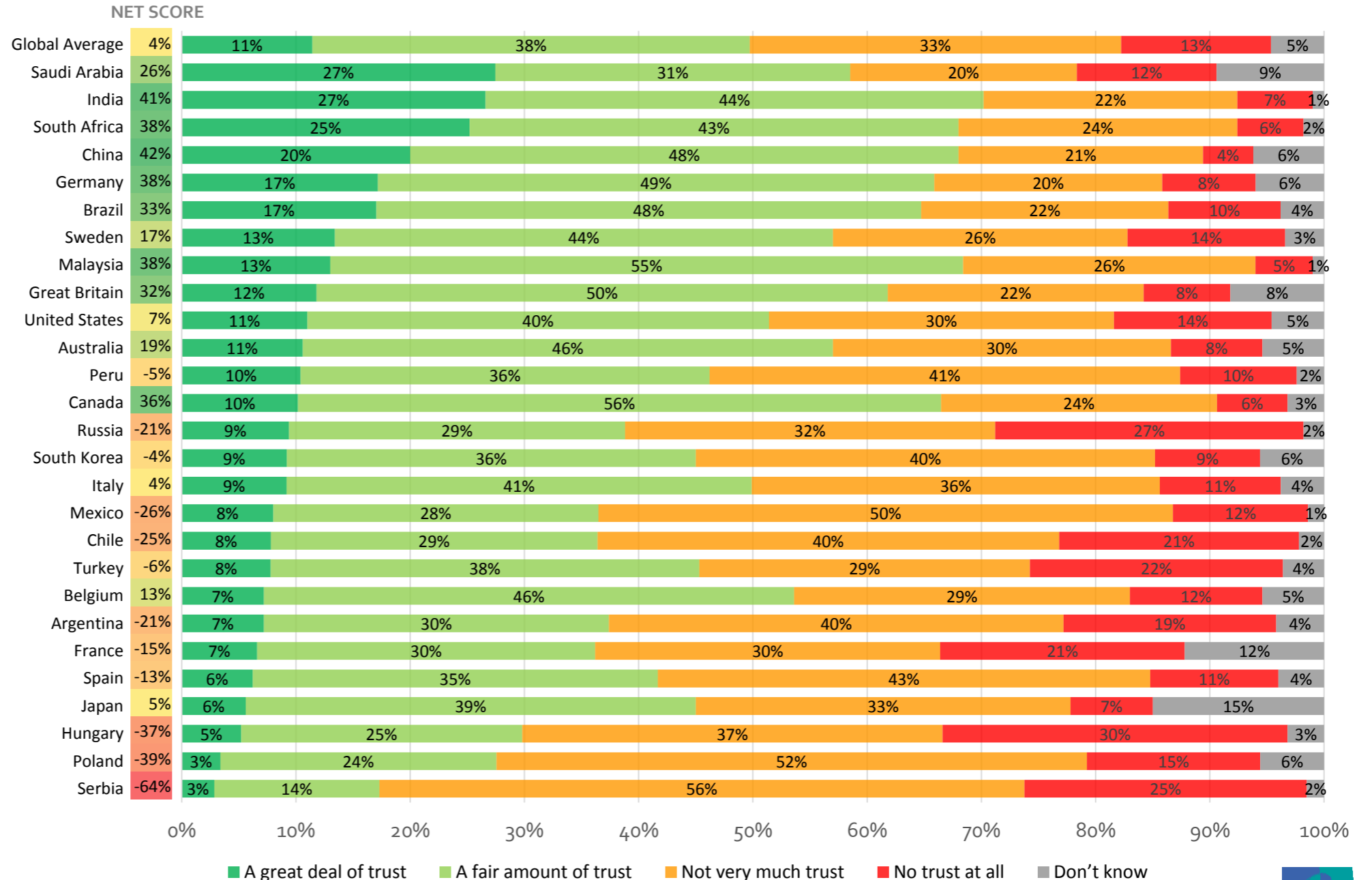


TRUST IN NEWS SOURCES

- At the global level, consumers trust television and radio (net score +4%) slightly more than they trust newspapers and magazines (net score -1%).
- In most countries, people are more inclined to say they have "a fair amount" of trust in TV and radio than "a great deal" of it.

Q. To what extent, if at all, do you trust each of the following to be a reliable source of news and information?

TELEVISION AND RADIO



* A net score refers to % trust a great deal or a fair amount MINUS % do not trust very much or at all (here and on all other slides)
 Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

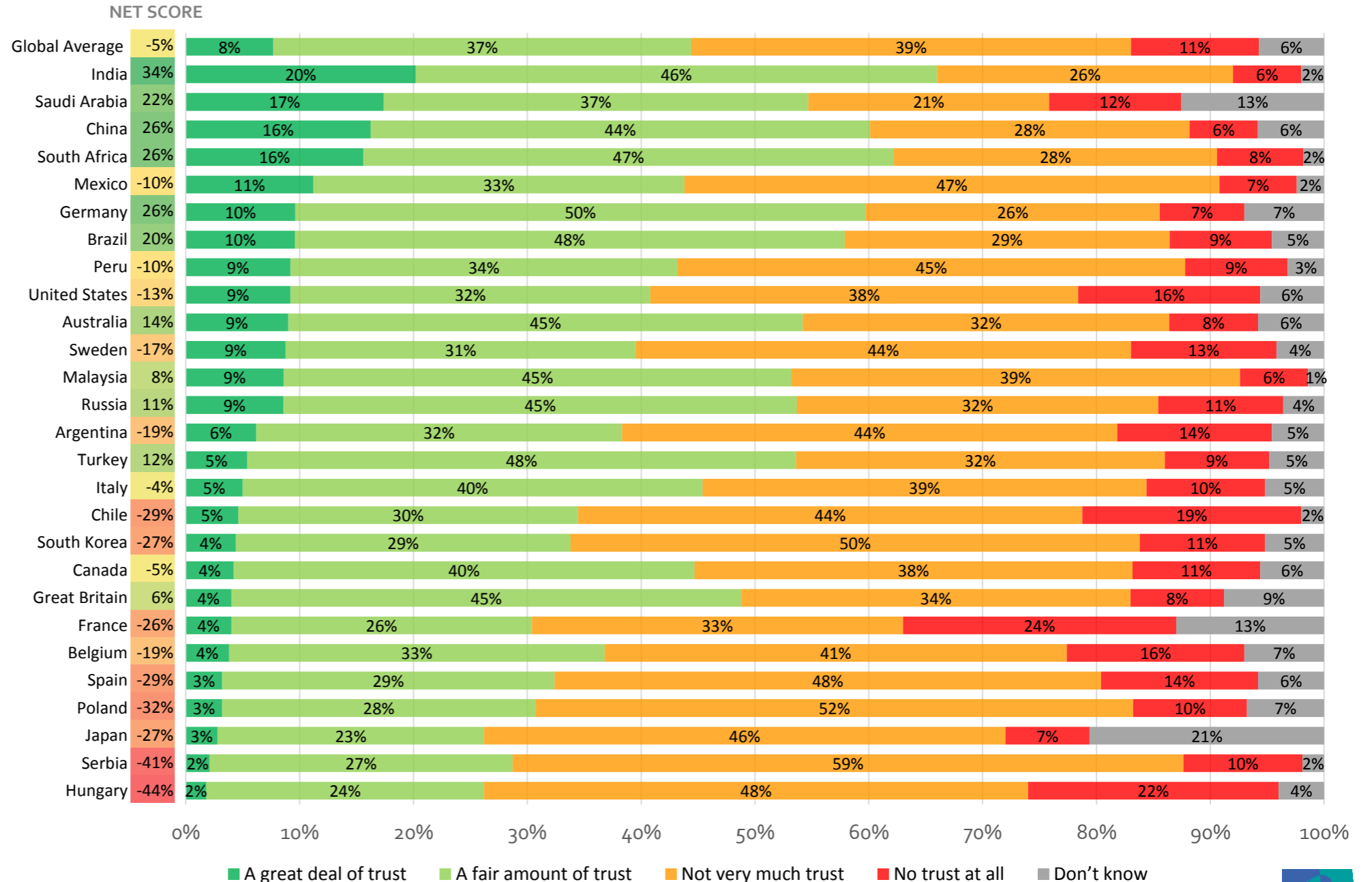


TRUST IN NEWS SOURCES

- Globally, more people have little or no trust in online news websites and platforms (50%) than have a great deal or a fair amount of trust (45%).
- India, China, South Africa, and Germany show the highest levels of trust in online news websites.

Q. To what extent, if at all, do you trust each of the following to be a reliable source of news and information?

ONLINE NEWS WEBSITES AND PLATFORMS



* A net score refers to % trust a great deal or a fair amount MINUS % do not trust very much or at all (here and on all other slides)
 Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

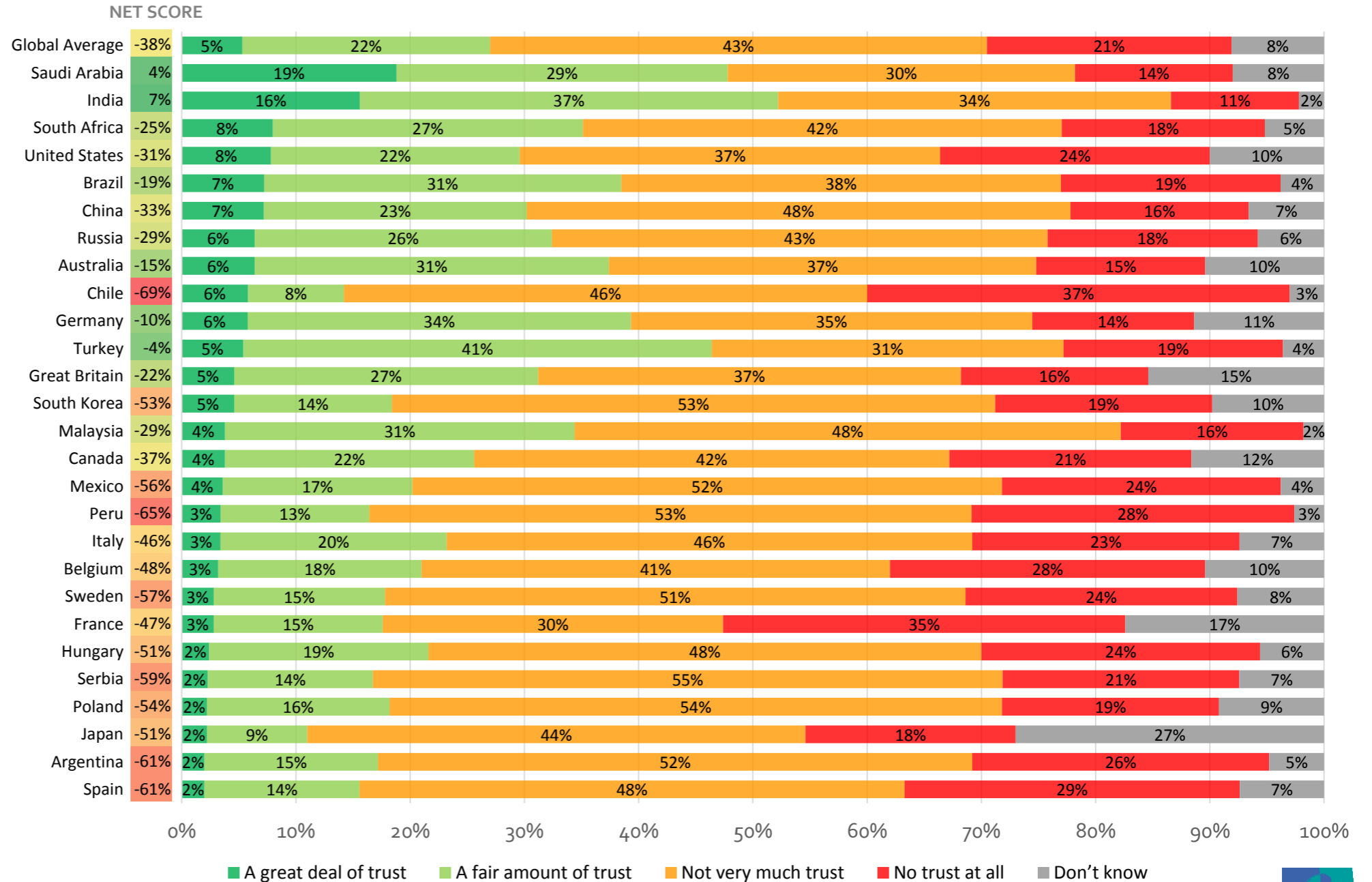


TRUST IN NEWS SOURCES

- Across the world, nearly two-thirds are mistrusting of information received by people they know predominantly through the Internet.
- Just two countries show a positive net score: Saudi Arabia (4%) and India (7%).

Q. To what extent, if at all, do you trust each of the following to be a reliable source of news and information?

PEOPLE I KNOW PREDOMINANTLY THROUGH THE INTERNET



* A net score refers to % trust a great deal or a fair amount MINUS % do not trust very much or at all (here and on all other slides)
 Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

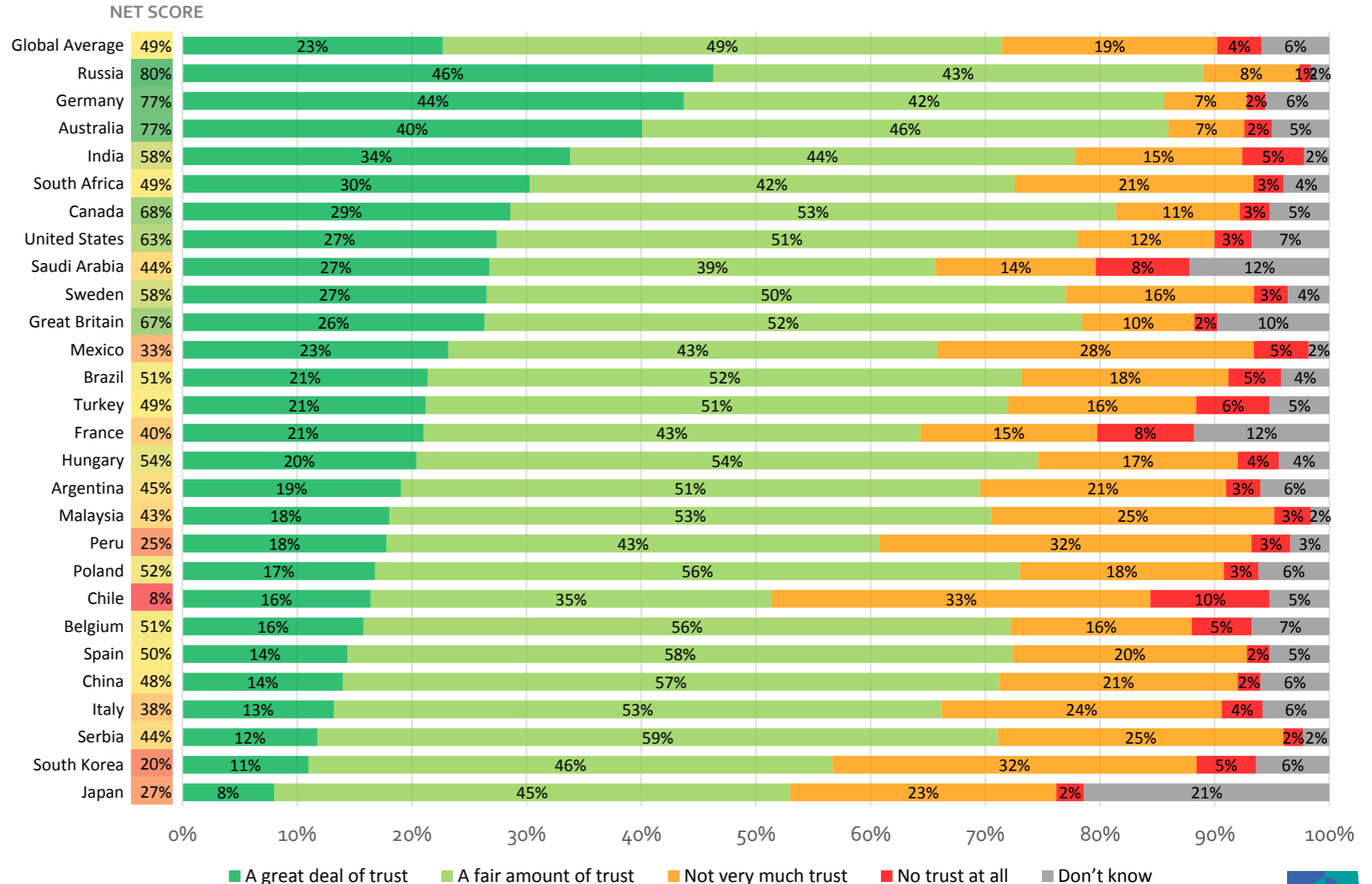


TRUST IN NEWS SOURCES

- People are most trusting of information they get from other people they know predominantly in person.
- Net trust in personal relations as an information source is highest in Russia, Germany, and Australia and lowest in Chile, South Korea, and Japan.

Q. To what extent, if at all, do you trust each of the following to be a reliable source of news and information?

PEOPLE I KNOW PREDOMINANTLY IN PERSON



* A net score refers to % trust a great deal or a fair amount MINUS % do not trust very much or at all (here and on all other slides)
 Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019



Net Trust Scores by Country

- When it comes to trusting news sources, proximity matters. People are most trusting of those they know in person, and least so of people they mostly know through the internet

Q. To what extent, if at all, do you trust each of the following to be a reliable source of news and information?

NET TRUST SCORES BY COUNTRY AND SOURCE

Net trust scores indicate, whether overall trust or distrust prevails in a given country. A **positive value** indicates that trust prevails, while a **negative value** indicates the opposite.

	Global Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	China	France	Germany	Great Britain	Hungary	India	Italy	Japan	Malaysia	Mexico	Peru	Poland	Russia	Saudi Arabia	Serbia	South Africa	South Korea	Spain	Sweden	Turkey	United States
Newspapers and magazines	-1%	-29%	12%	7%	35%	29%	-33%	39%	-12%	36%	1%	-58%	55%	0%	11%	25%	-16%	-18%	-37%	-21%	19%	-77%	30%	-10%	-18%	5%	-12%	9%
Television and radio	4%	13%	19%	-21%	33%	36%	-25%	42%	-15%	38%	32%	-37%	41%	4%	5%	38%	-26%	-5%	-39%	-21%	26%	-64%	38%	-4%	-13%	17%	-6%	7%
Online news websites and platforms	-5%	-19%	14%	-19%	20%	-5%	-29%	26%	-26%	26%	6%	-44%	34%	-4%	-27%	8%	-10%	-10%	-32%	11%	22%	-41%	26%	-27%	-29%	-17%	12%	-13%
People I know predominantly through the internet	-38%	-61%	-15%	-48%	-19%	-37%	-69%	-33%	-47%	-10%	-22%	-51%	7%	-46%	-51%	-29%	-56%	-65%	-54%	-29%	4%	-59%	-25%	-53%	-61%	-57%	-4%	-31%
People I know predominantly in person	49%	45%	77%	51%	51%	68%	8%	48%	40%	77%	67%	54%	58%	38%	27%	43%	33%	25%	52%	80%	44%	44%	49%	20%	50%	58%	49%	63%

*A net score refers to % trust a great deal or a fair amount MINUS % do not trust very much or at all (here and on all other slides)
Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from **January 25 – February 8, 2019**

INFORMATION

Relevance of News Sources

How do people assess the personal relevance of different news and information sources?

IPSOS GLOBAL ADVISOR

GAME CHANGERS



© 2019 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and *may not be* disclosed or reproduced without the prior written consent of Ipsos.

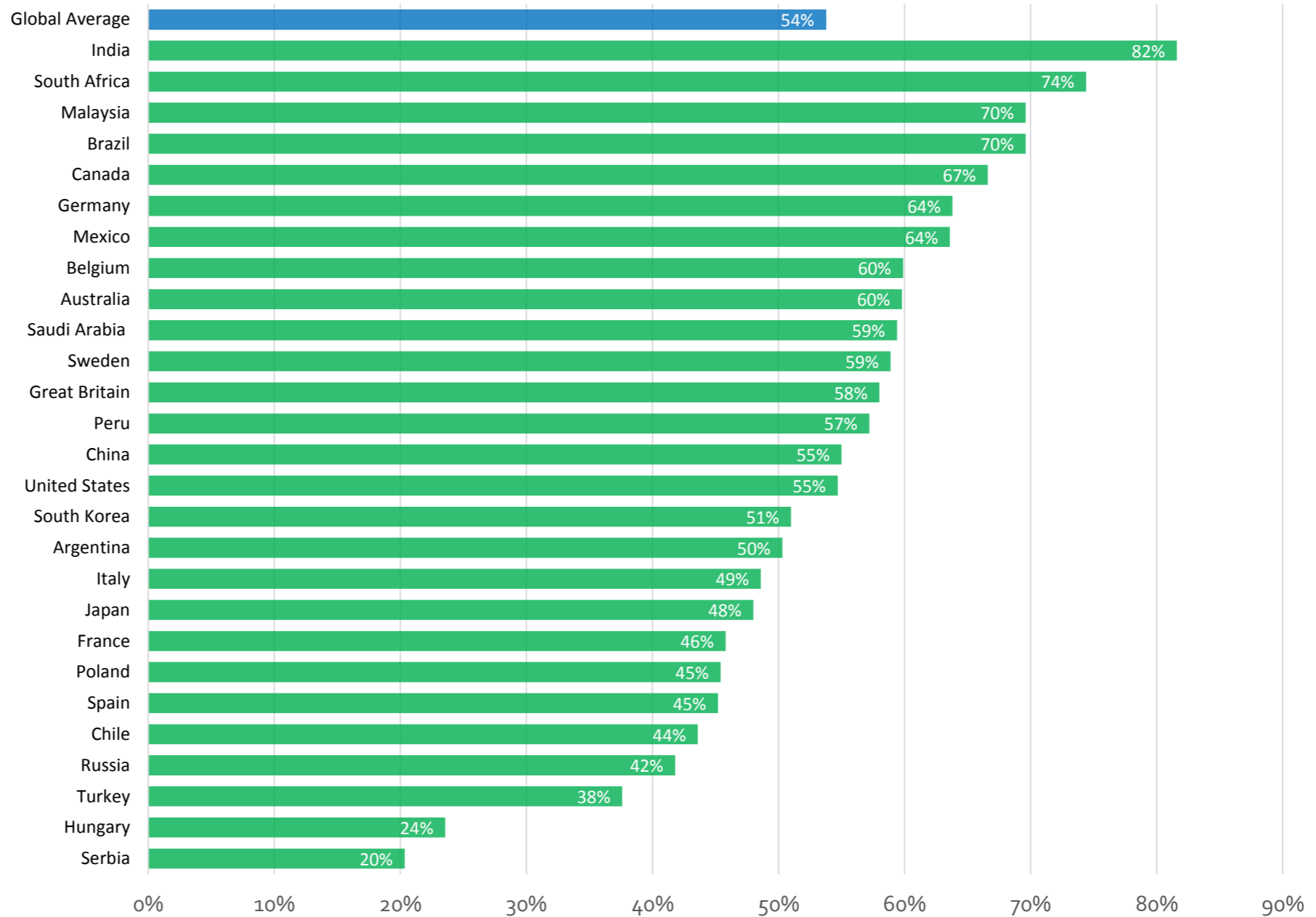
RELEVANCE OF NEWS SOURCES

- Globally, over half (54%) rate newspapers and magazines as very or fairly good at providing relevant news and information.
- Newspapers and magazines are rated especially high on relevance in India (82%) and especially low in Hungary (24%) and Serbia (20%).

Q. How good would you say each of the following is at providing news and information that is relevant to you?

Display of TOP 2 values:
1 "very good"
2 "fairly good"

NEWSPAPERS AND MAGAZINES



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

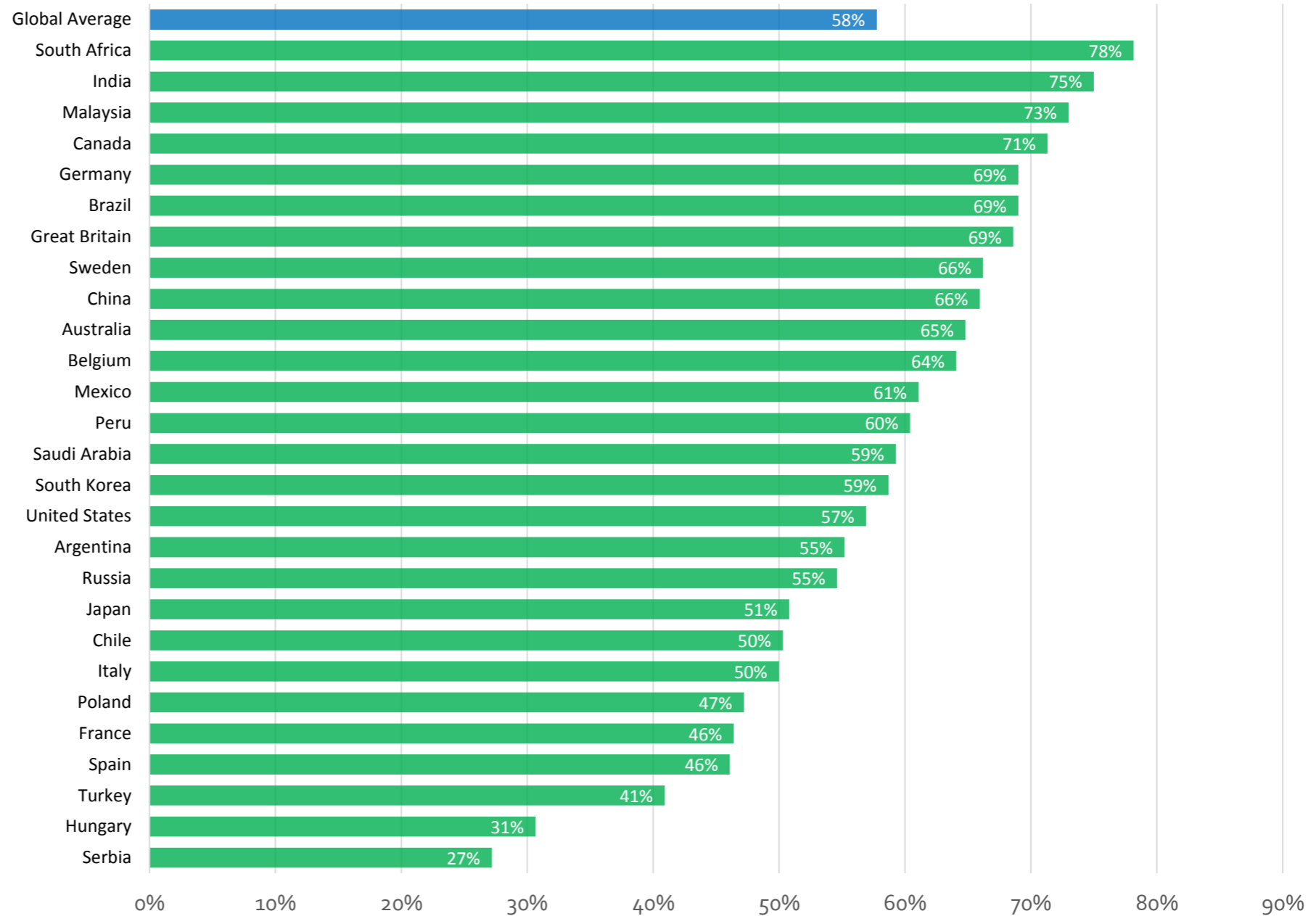
RELEVANCE OF NEWS SOURCES

- Globally, more consumers rate TV and radio as a relevant source of news and information (58%) than do so of newspapers and magazines (54%).
- Three quarters in South Africa (78%) and India (75%) rate TV and radio news as very or fairly good at providing relevant news and information.

Q. How good would you say each of the following is at providing news and information that is relevant to you?

Display of TOP 2 values:
1 "very good"
2 "fairly good"

TELEVISION AND RADIO



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

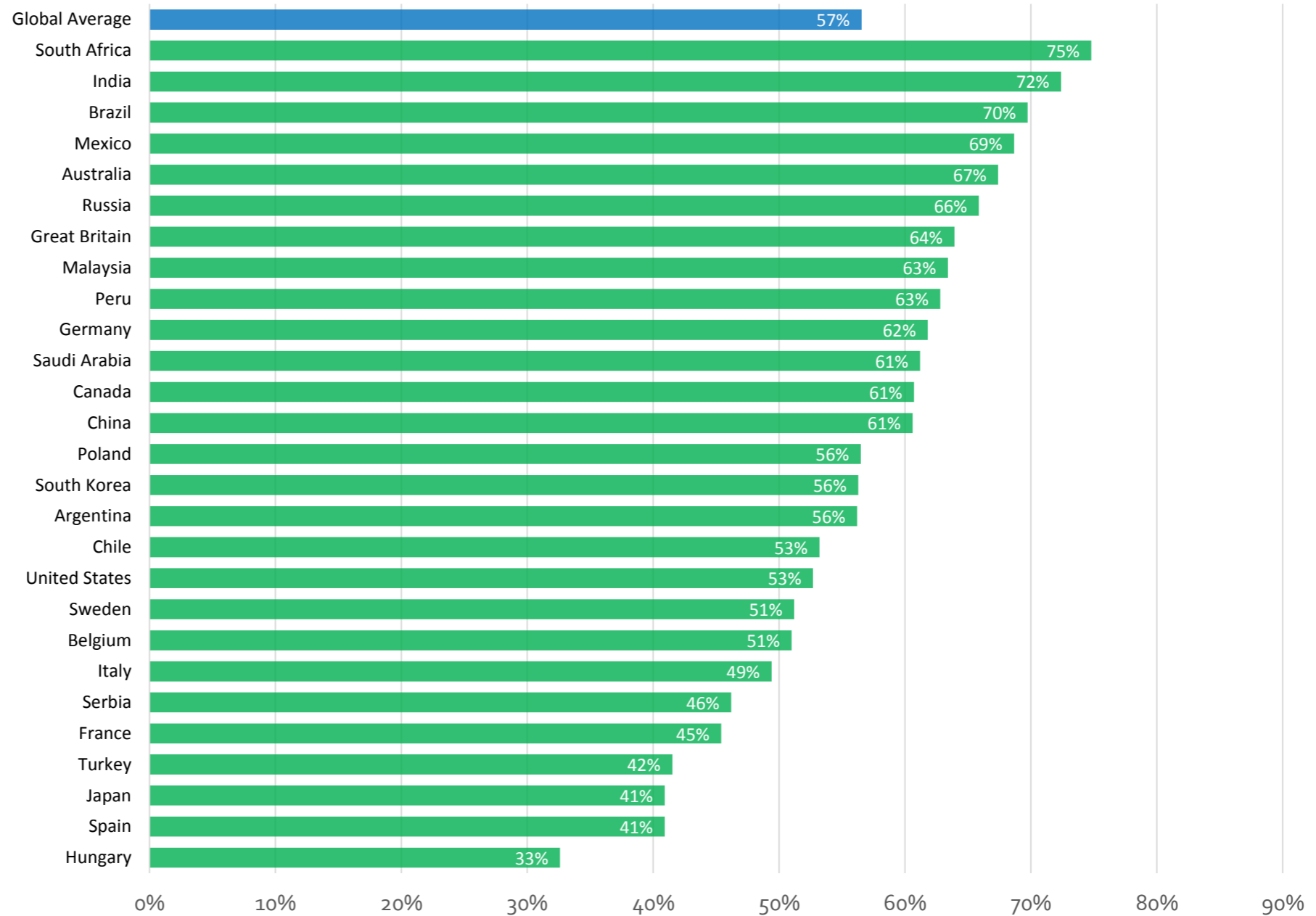
RELEVANCE OF NEWS SOURCES

- *At the global level, nearly six in ten (57%) report online news websites are good at providing relevant information.*
- *Agreement ranges from 75% in South Africa to just 33% in Hungary.*

Q. How good would you say each of the following is at providing news and information that is relevant to you?

*Display of TOP 2 values:
1 "very good"
2 "fairly good"*

ONLINE NEWS WEBSITES AND PLATFORMS



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

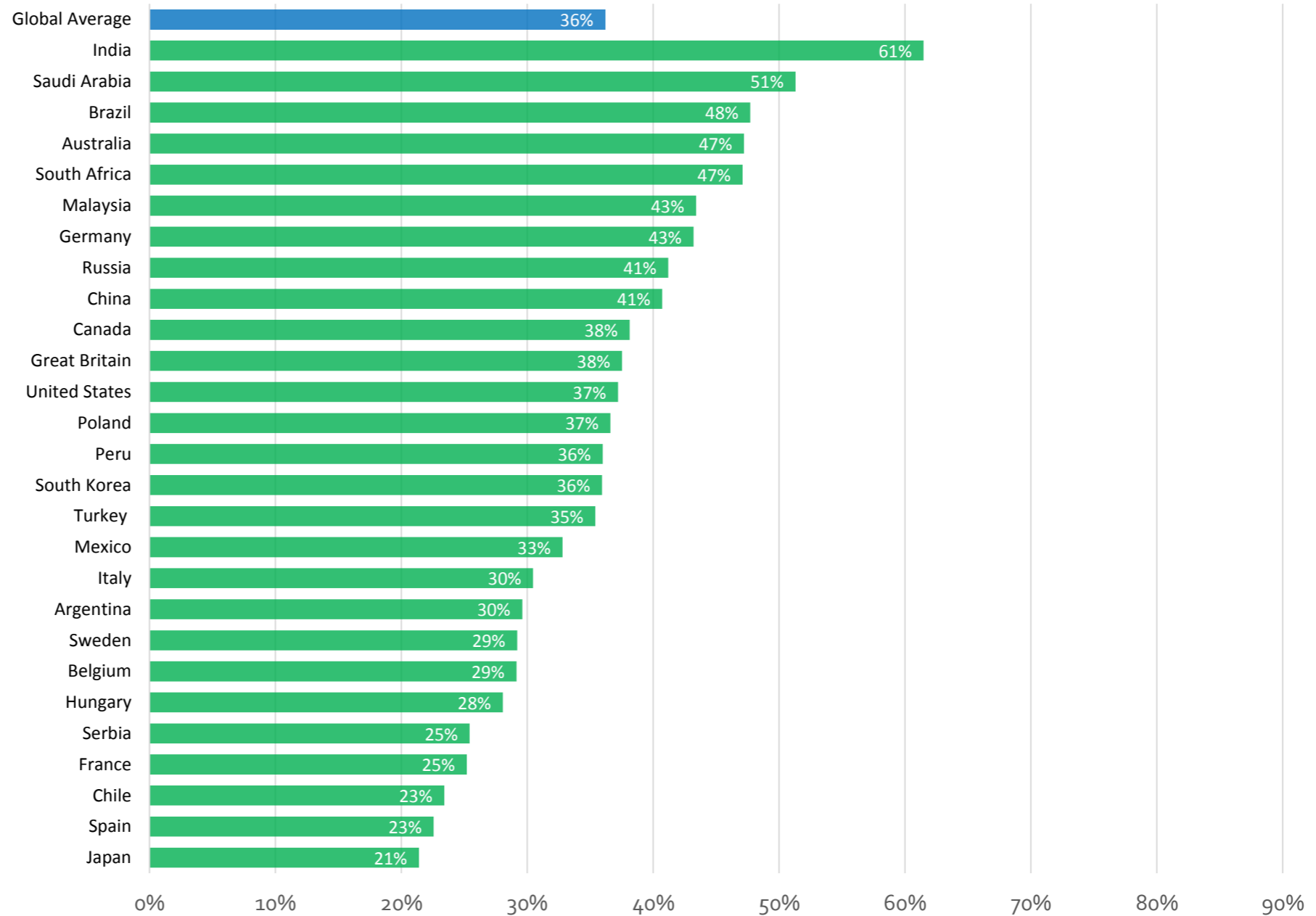
RELEVANCE OF NEWS SOURCES

- On average, the relevance of news and information received by people known predominantly through the internet is rated the lowest – only one third consider them as good at providing relevant information.

Q. How good would you say each of the following is at providing news and information that is relevant to you?

Display of TOP 2 values:
1 "very good"
2 "fairly good"

PEOPLE I KNOW PREDOMINANTLY THROUGH THE INTERNET



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

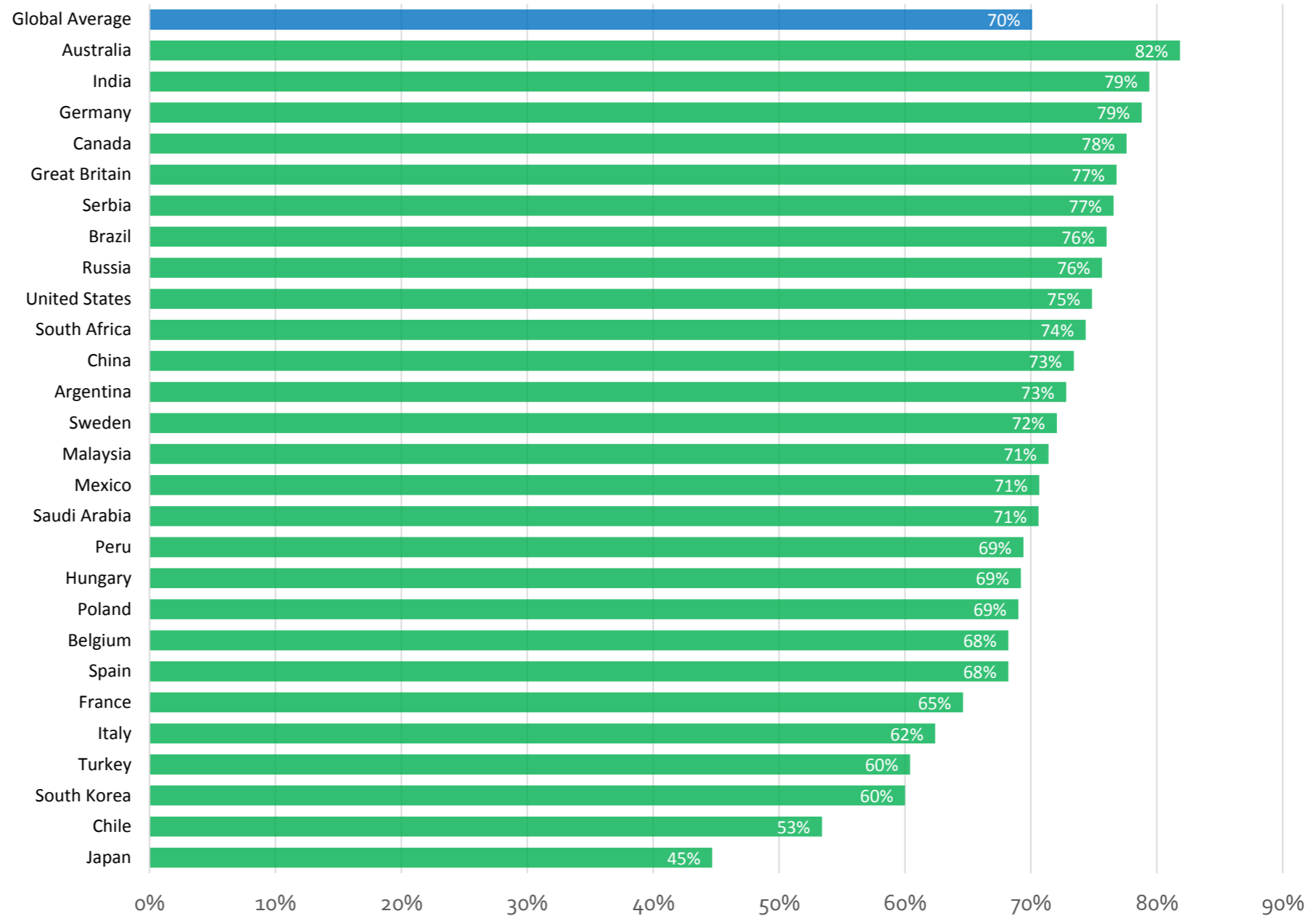
RELEVANCE OF NEWS SOURCES

- Personal relationships are rated as good sources at providing relevant news and information by 70% of consumers globally (from 82% in Australia to 45% in Japan)

Q. How good would you say each of the following is at providing news and information that is relevant to you?

Display of TOP 2 values:
 1 "very good"
 2 "fairly good"

PEOPLE I KNOW PREDOMINANTLY IN PERSON



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

Summary of Relevance of News Sources

- In nearly all countries, personal contacts are rated as the most relevant source of news and information.

Q. How good would you say each of the following is at providing news and information that is relevant to you?

Display of TOP 2 values:
 1 "very good"
 2 "fairly good"

RELEVANCE BY COUNTRY AND SOURCE

	Global Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	China	France	Germany	Great Britain	Hungary	India	Italy	Japan	Malaysia	Mexico	Peru	Poland	Russia	Saudi Arabia	Serbia	South Africa	South Korea	Spain	Sweden	Turkey	United States
Newspapers and magazines	54%	50%	60%	60%	70%	67%	44%	55%	46%	64%	58%	24%	82%	49%	48%	70%	64%	57%	45%	42%	20%	59%	74%	51%	45%	59%	38%	55%
Television and radio	58%	55%	65%	64%	69%	71%	50%	66%	46%	69%	69%	31%	75%	50%	51%	73%	61%	60%	47%	55%	27%	59%	78%	59%	46%	66%	41%	57%
Online news websites and platforms	57%	56%	67%	51%	70%	61%	53%	61%	45%	62%	64%	33%	72%	49%	41%	63%	69%	63%	56%	66%	46%	61%	75%	56%	41%	51%	42%	53%
People I know predominantly through the internet	36%	30%	47%	29%	48%	38%	23%	41%	25%	43%	38%	28%	61%	30%	21%	43%	33%	36%	37%	41%	25%	51%	47%	36%	23%	29%	35%	37%
People I know predominantly in person	70%	73%	82%	68%	76%	78%	53%	73%	65%	79%	77%	69%	79%	62%	45%	71%	71%	69%	69%	76%	77%	71%	74%	60%	68%	72%	60%	75%

Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019



Perceived Change in Trust Over the Last 5 Years

How is trust in news sources perceived to have changed over the last five years?

IPSOS GLOBAL ADVISOR



GAME CHANGERS Ipsos

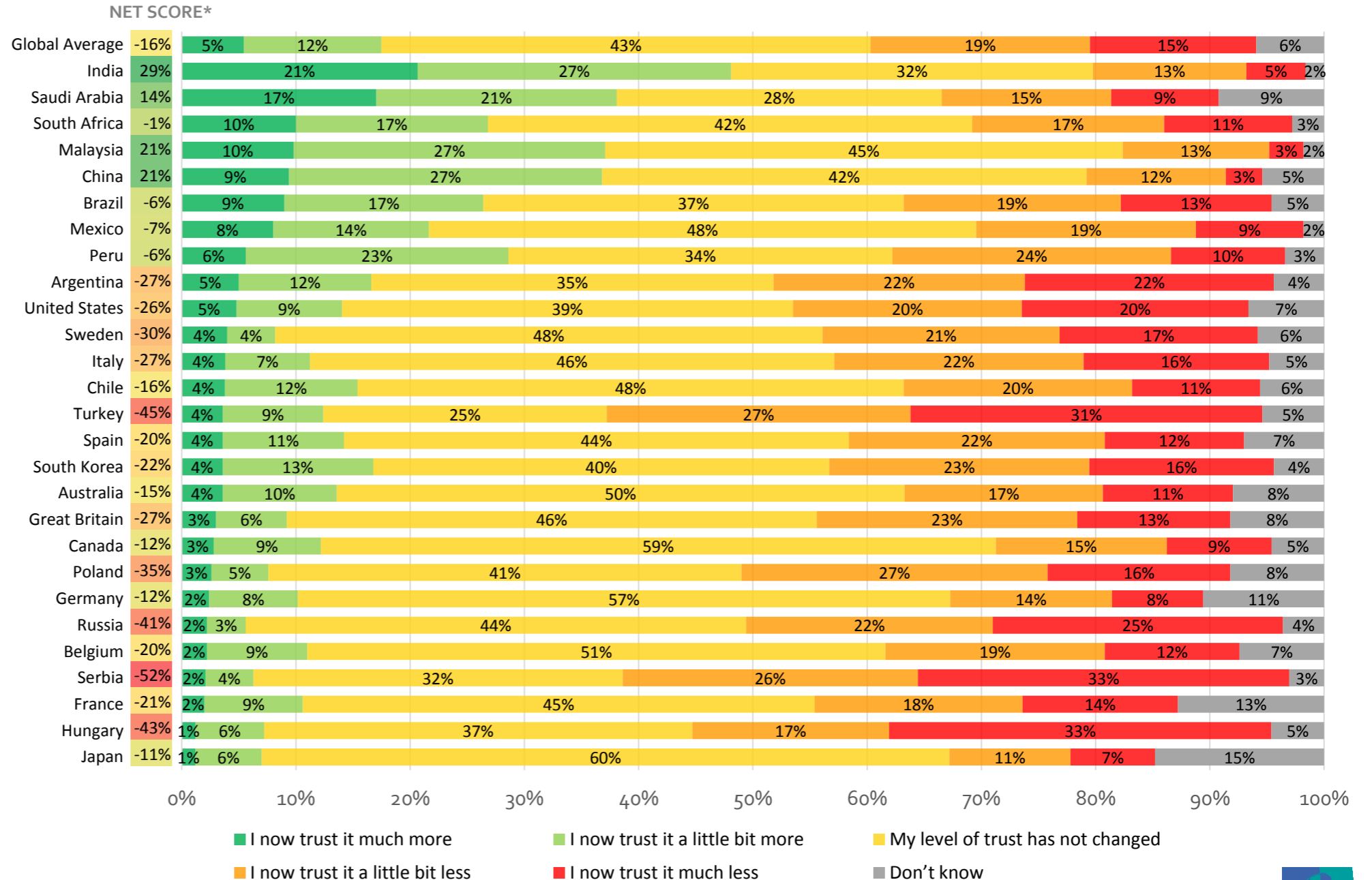
© 2019 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Ipsos.

PERCEIVED CHANGE IN TRUST

- In most countries, trust is more often perceived to have decreased over the last five years than to have increased.
- This is especially the case in Turkey and across Eastern Europe.

Q. And how much would, if at all, would you say your level of trust in each of the following has changed over the past five years?

NEWSPAPERS AND MAGAZINES



*Net trust scores indicate whether trust levels have overall increased (positive value) or decreased (negative value).

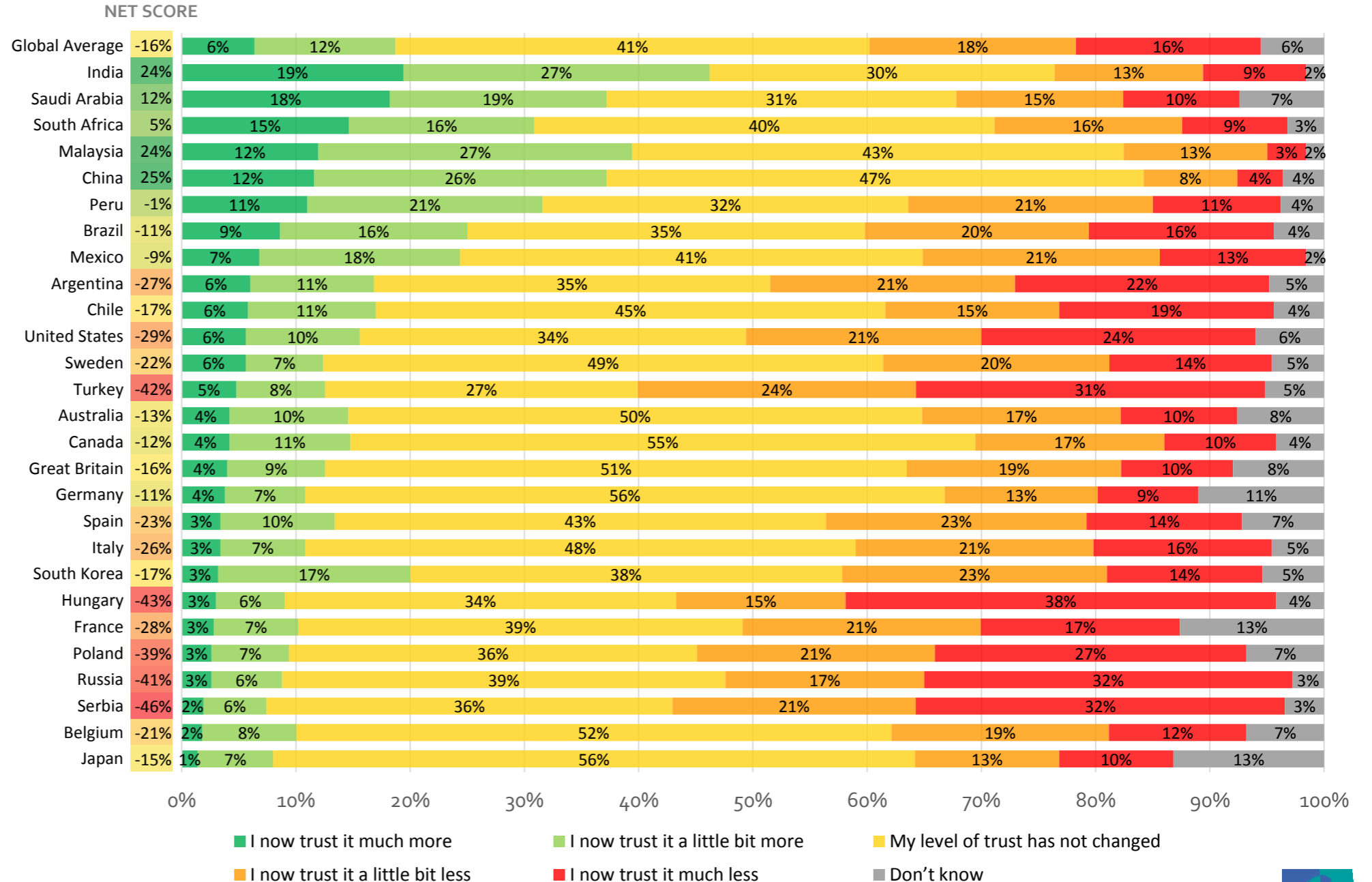
Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

PERCEIVED CHANGE IN TRUST

- Globally, one in three say they trust TV and radio as a source of information less than they did five years ago; only one in six say they trust TV and radio more.
- Nearly half of Americans (45%) say they trust TV and radio less than they did five years ago.

Q. And how much would, if at all, would you say your level of trust in each of the following has changed over the past five years?

TELEVISION AND RADIO



*Net trust scores indicate whether trust levels have overall increased (positive value) or decreased (negative value).

Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

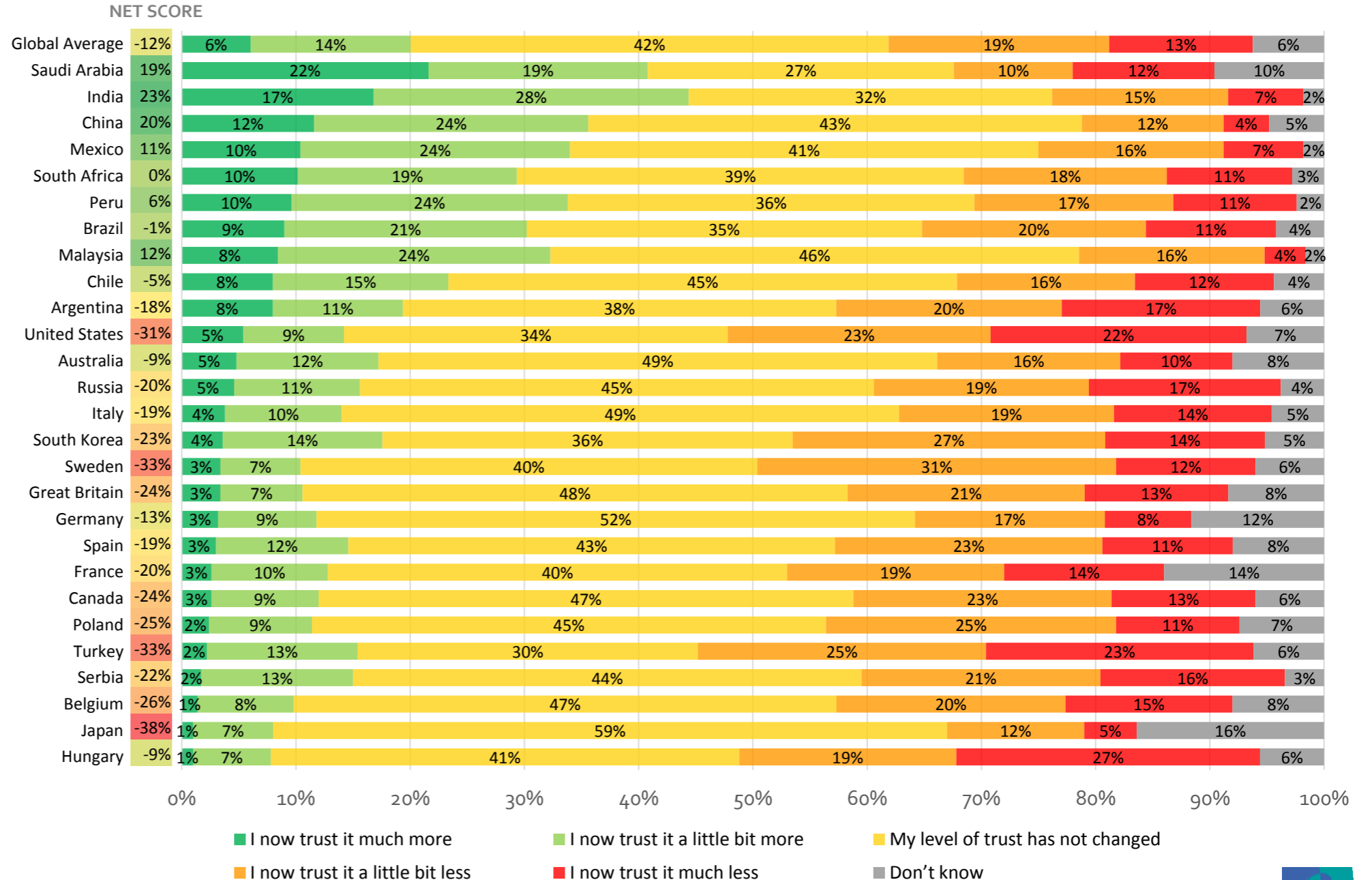


PERCEIVED CHANGE IN TRUST

- Globally, one in five say they trust online news sites more than they did five years ago, while a third say they trust them less.
- Americans have particularly soured on online news websites and platforms (net score of -31%), along with Swedes (-33%), Turks (-33%), and Japanese (-38%).

Q. And how much would, if at all, would you say your level of trust in each of the following has changed over the past five years?

ONLINE NEWS WEBSITES AND PLATFORMS



*Net trust scores indicate whether trust levels have overall increased (positive value) or decreased (negative value).

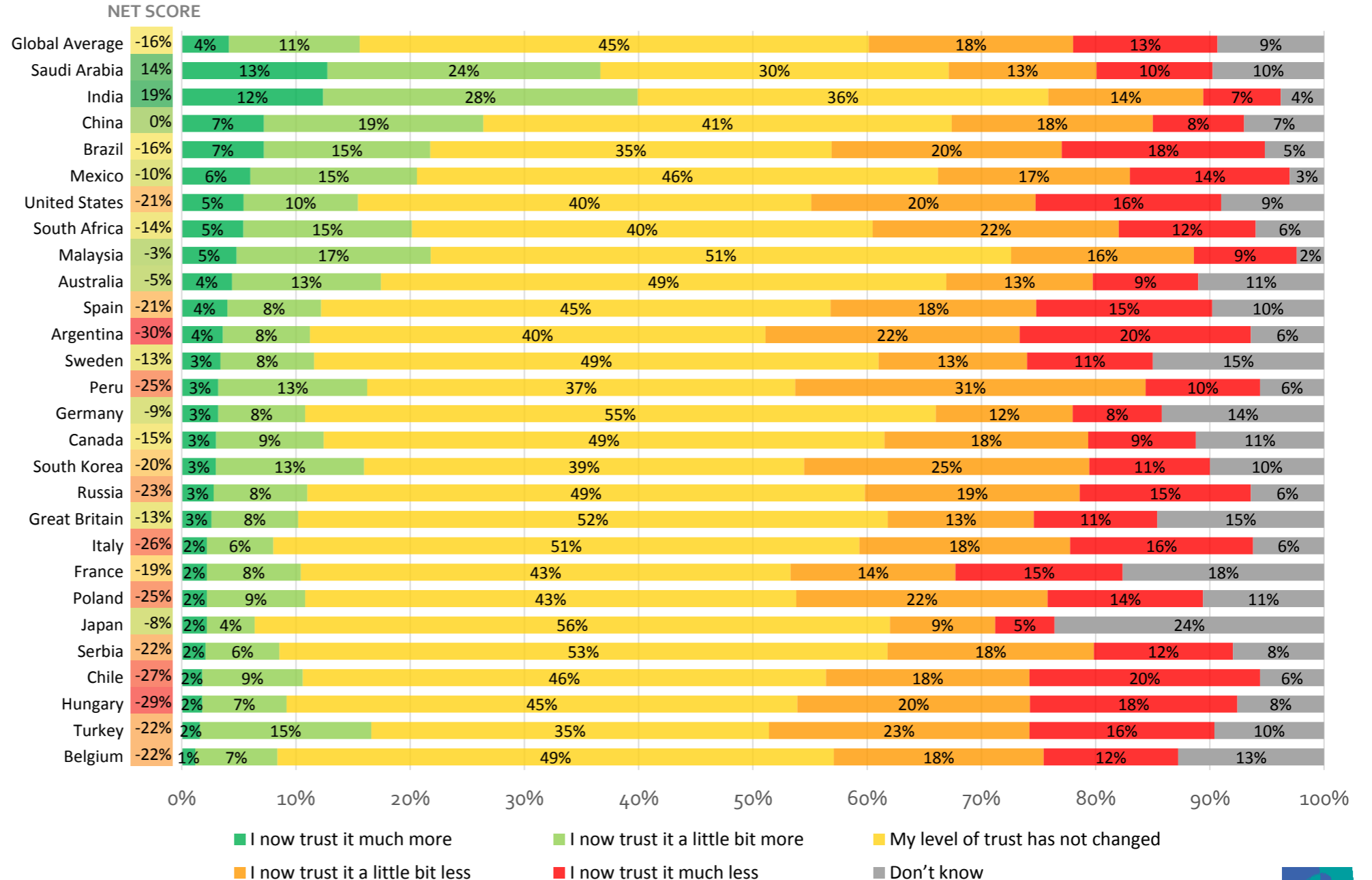
Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

PERCEIVED CHANGE IN TRUST

- Trust in people known predominantly through the internet has greatly decreased. Only two countries (Saudi Arabia and India) show a positive net score.
- The biggest decreases in trust come from Latin America and areas of Europe (Hungary, Italy, and Poland).

Q. And how much would, if at all, would you say your level of trust in each of the following has changed over the past five years?

PEOPLE I KNOW PREDOMINANTLY THROUGH THE INTERNET



*Net trust scores indicate whether trust levels have overall increased (positive value) or decreased (negative value).

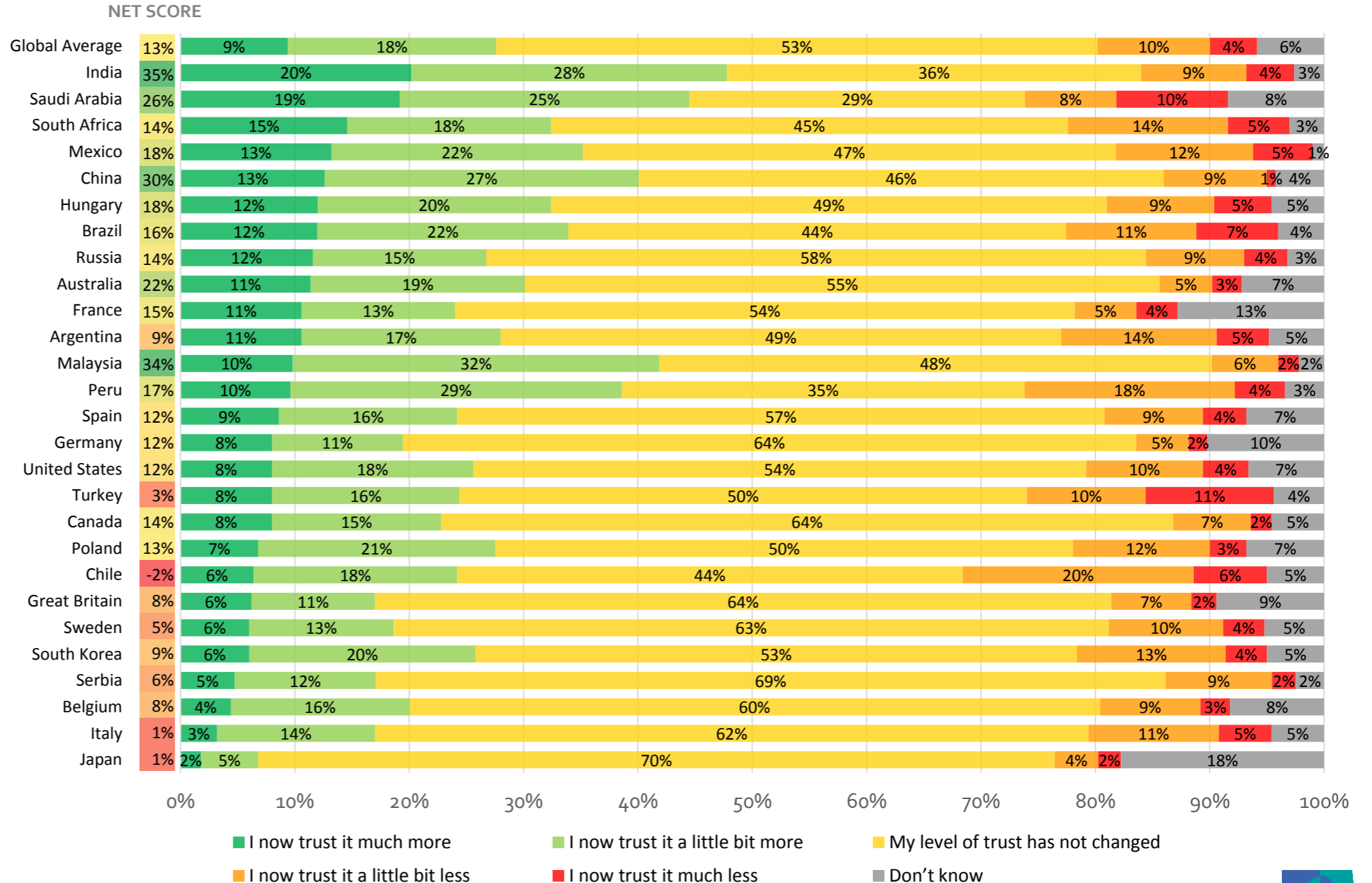
Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

PERCEIVED CHANGE IN TRUST

- Globally, trust in personal contacts (other people known personally) as a source of news has grown more than it has receded.
- Though a majority report their levels of trust in personal contacts have not changed (53%), more report a gain (27%) than a loss (14%)

Q. And how much would, if at all, would you say your level of trust in each of the following has changed over the past five years?

PEOPLE I KNOW PREDOMINANTLY IN PERSON



*Net trust scores indicate whether trust levels have overall increased (positive value) or decreased (negative value).

Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

Net Perceived Change in Trust by Country

- Overall, and across most countries, trust in all sources of information is perceived to have declined, except for personal contacts.

Q. And how much would, if at all, would you say your level of trust in each of the following has changed over the past five years?

NET PERCEIVED CHANGE IN TRUST BY COUNTRY AND SOURCE

Net scores indicate how perceived trust has changed in each country.

A **positive value** indicates that people are more trusting than they were five years ago, while a **negative value** indicates the opposite.

	Global Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	China	France	Germany	Great Britain	Hungary	India	Italy	Japan	Malaysia	Mexico	Peru	Poland	Russia	Saudi Arabia	Serbia	South Africa	South Korea	Spain	Sweden	Turkey	United States
Newspapers and magazines	-16%	-27%	-15%	-20%	-6%	-12%	-16%	21%	-21%	-12%	-27%	-43%	29%	-27%	-11%	21%	-7%	-6%	-35%	-41%	14%	-52%	-1%	-22%	-20%	-30%	-45%	-26%
Television and radio	-16%	-27%	-13%	-21%	-11%	-12%	-17%	25%	-28%	-11%	-16%	-43%	24%	-26%	-15%	24%	-9%	-1%	-39%	-41%	12%	-46%	5%	-17%	-23%	-22%	-42%	-29%
Online news websites and platforms	-12%	-18%	-9%	-26%	-1%	-24%	-5%	20%	-20%	-13%	-24%	-9%	23%	-19%	-38%	12%	11%	6%	-25%	-20%	19%	-22%	0%	-23%	-19%	-33%	-33%	-31%
People I know predominantly through the internet	-16%	-30%	-5%	-22%	-16%	-15%	-27%	0%	-19%	-9%	-13%	-29%	19%	-26%	-8%	-3%	-10%	-25%	-25%	-23%	14%	-22%	-14%	-20%	-21%	-13%	-22%	-21%
People I know predominantly in person	13%	9%	22%	8%	16%	14%	-2%	30%	15%	12%	8%	18%	35%	1%	1%	34%	18%	17%	13%	14%	26%	6%	14%	9%	12%	5%	3%	12%

*Net trust scores indicate whether trust levels have overall increased (positive value) or decreased (negative value).

Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

Prevalence of Fake News

How prevalent is fake news perceived to be in different news sources?

IPSOS GLOBAL ADVISOR



GAME CHANGERS



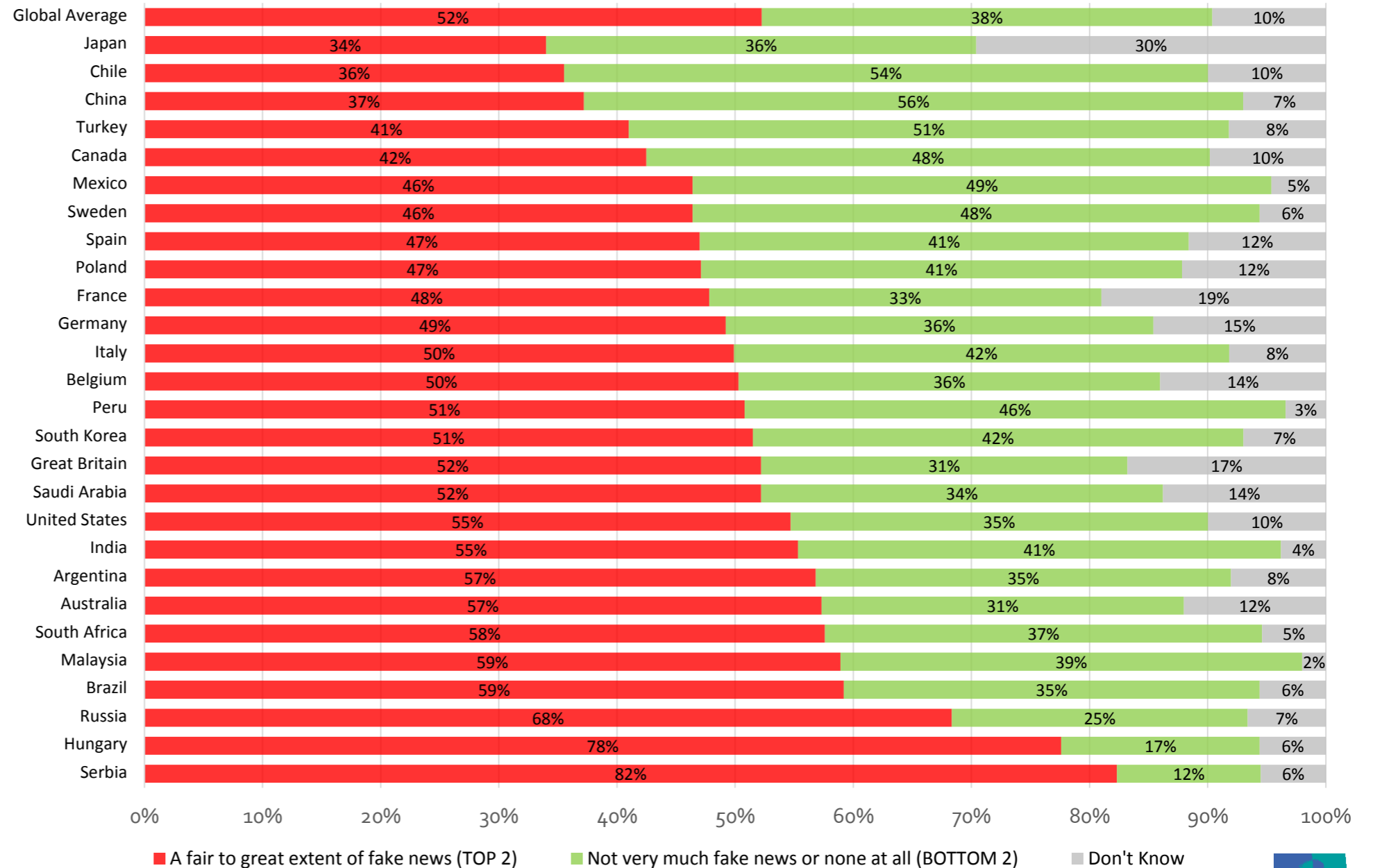
© 2019 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Ipsos.

PREVALENCE OF FAKE NEWS

- Globally, a majority (52%) perceive fake news to be prevalent in newspapers and magazines.
- Fake news is most widely perceived to be prevalent in Serbia (82%), Hungary (78%), and Russia (68%) and least so in Japan (34%), Chile (36%) and China (37%).

Q. How prevalent, if at all, would you say "fake news" is in the news and information provided to you by each of the following?

NEWSPAPERS AND MAGAZINES



*Top 2: Prevalent to a great/fair extent. Bottom 2: Not very much/at all prevalent.

Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

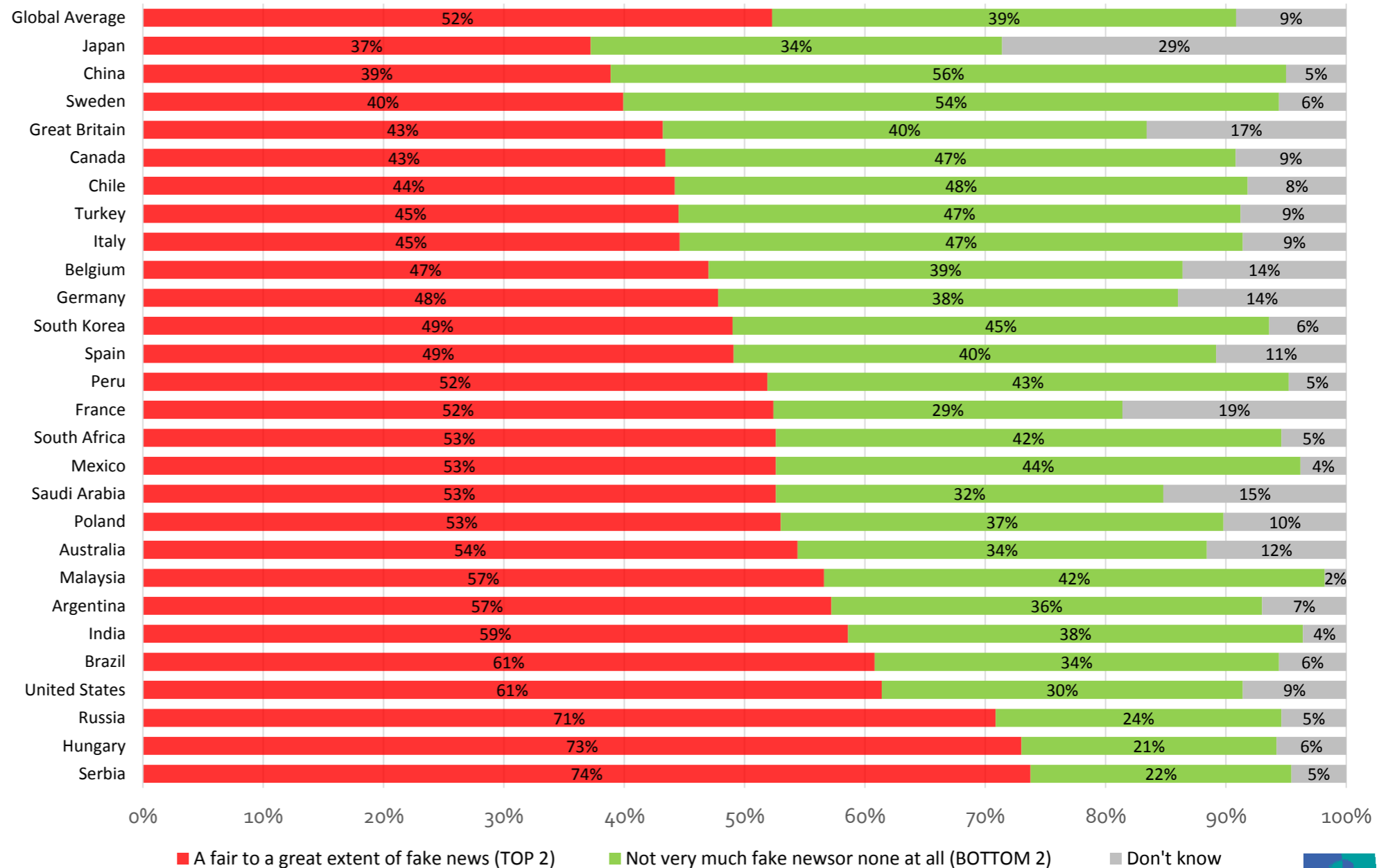


PREVALENCE OF FAKE NEWS

- Globally, half (52%) of those surveyed say at least a fair amount of the news on TV and radio is "fake news".
- This opinion is most common in Serbia (74%), Hungary (73%), and Russia (71%).

Q. How prevalent, if at all, would you say "fake news" is in the news and information provided to you by each of the following?

TELEVISION AND RADIO



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

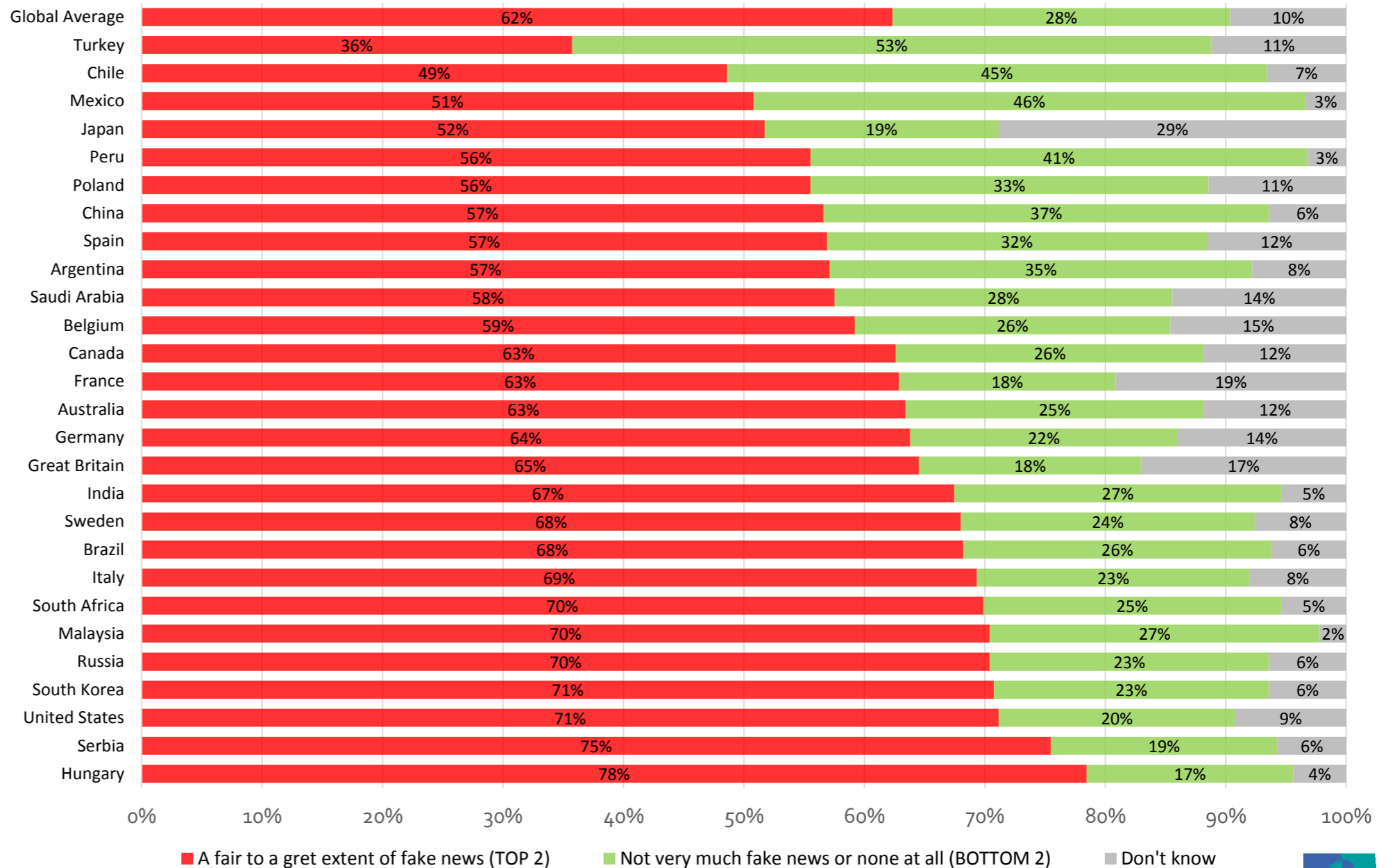


PREVALENCE OF FAKE NEWS

- Nearly two-thirds (62%) globally say fake news is prevalent on online news websites and platforms.
- Strong majorities in Hungary (78%), Serbia (75%), the U.S. (71%), and South Korea (71%) believe fake news is prevalent online.

Q. How prevalent, if at all, would you say "fake news" is in the news and information provided to you by each of the following?

ONLINE NEWS WEBSITES AND PLATFORMS



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

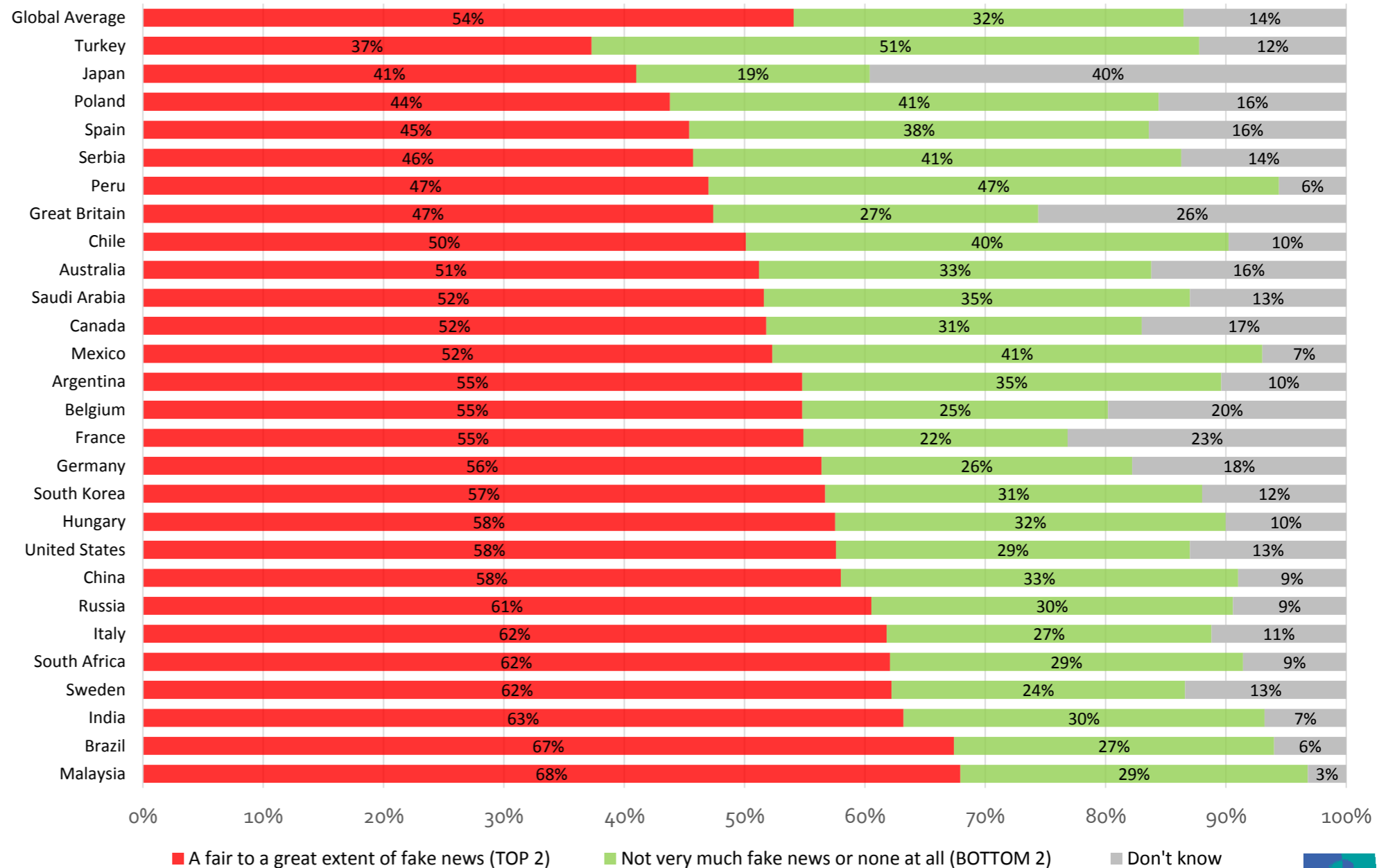


PREVALENCE OF FAKE NEWS

- Over half of the respondents from across the world (54%) say news and information they receive from people they know predominantly through the internet contains a fair amount or a great deal of fake news.

Q. How prevalent, if at all, would you say "fake news" is in the news and information provided to you by each of the following?

PEOPLE I KNOW PREDOMINANTLY THROUGH THE INTERNET



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

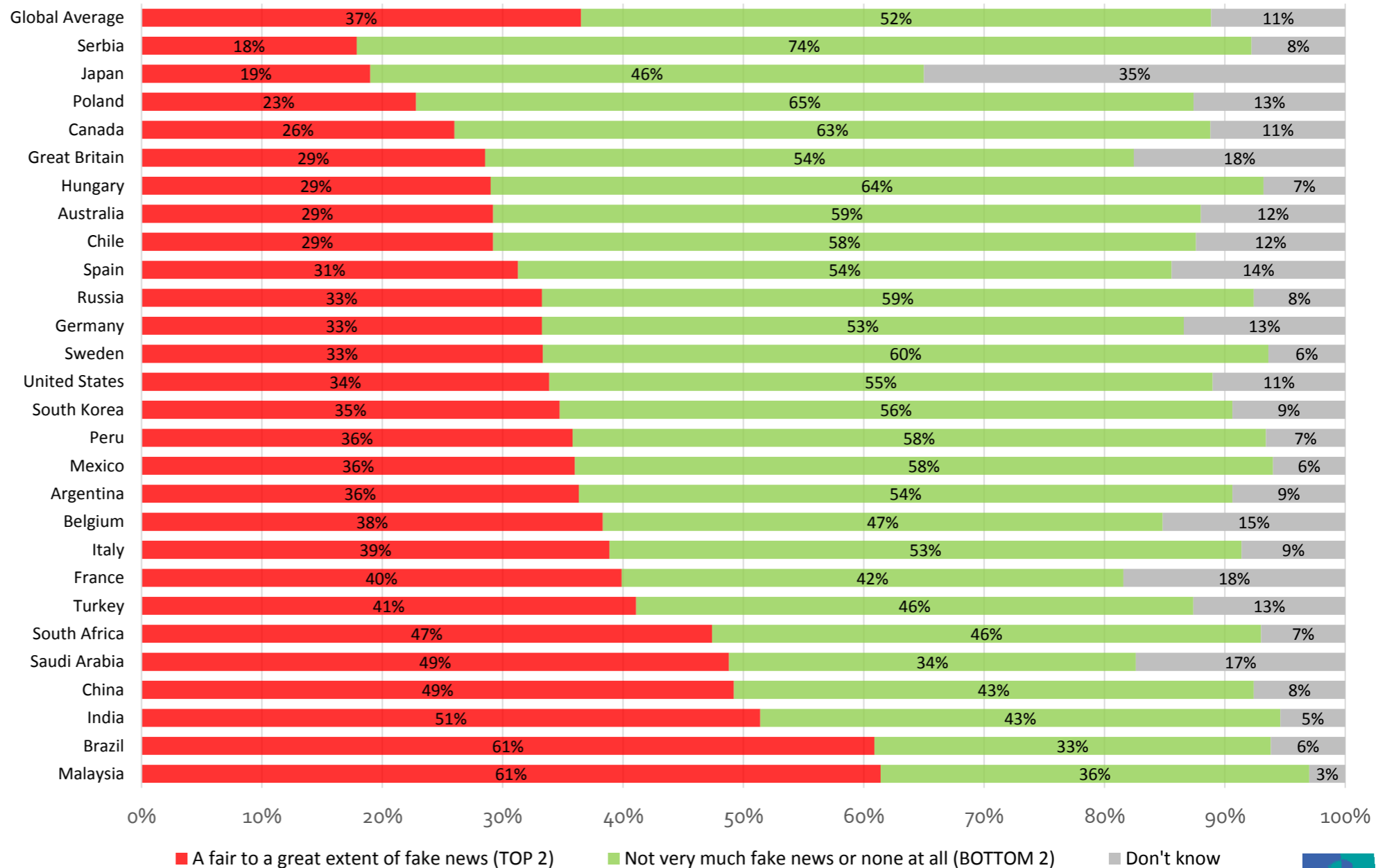


PREVALENCE OF FAKE NEWS

- Globally, just over a third (37%) say information from people they know personally contains at least a fair amount of fake news.
- However, while more than six in ten say so in Brazil and Malaysia, only two in ten do in Serbia and Japan.

Q. How prevalent, if at all, would you say "fake news" is in the news and information provided to you by each of the following?

PEOPLE I KNOW PREDOMINANTLY IN PERSON



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019



Summary: Prevalence of Fake News

- Looking at all sources, online news websites are seen as containing a great deal or a fair amount of fake news more than other sources of news and information.

Q. How prevalent, if at all, would you say "fake news" is in the news and information provided to you by each of the following?

PERCEIVED PREVALENCE OF FAKE NEWS ACROSS DIFFERENT SOURCES

Percentages shown are for "a great deal" or "a fair amount" of fake news (TOP 2).

	Global Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	China	France	Germany	Great Britain	Hungary	India	Italy	Japan	Malaysia	Mexico	Peru	Poland	Russia	Saudi Arabia	Serbia	South Africa	South Korea	Spain	Sweden	Turkey	United States
Newspapers and magazines	52%	57%	57%	50%	59%	42%	36%	37%	48%	49%	52%	78%	55%	50%	34%	59%	46%	51%	47%	68%	52%	82%	58%	51%	47%	46%	41%	55%
Television and radio	52%	57%	54%	47%	61%	43%	44%	39%	52%	48%	43%	73%	59%	45%	37%	57%	53%	52%	53%	71%	53%	74%	53%	49%	49%	40%	45%	61%
Online news websites and platforms	62%	57%	63%	59%	68%	63%	49%	57%	63%	64%	65%	78%	67%	69%	52%	70%	51%	56%	56%	70%	58%	75%	70%	71%	57%	68%	36%	71%
People I know predominantly through the internet	54%	55%	51%	55%	67%	52%	50%	58%	55%	56%	47%	58%	63%	62%	41%	68%	52%	47%	44%	61%	52%	46%	62%	57%	45%	62%	37%	58%
People I know predominantly in person	37%	36%	29%	38%	61%	26%	29%	49%	40%	33%	29%	29%	51%	39%	19%	61%	36%	36%	23%	33%	49%	18%	47%	35%	31%	33%	41%	34%

Intentions of News Sources

To what extent do citizens think various news sources act with good intentions?

IPSOS GLOBAL ADVISOR

GAME CHANGERS



© 2019 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Ipsos.

INTENTIONS OF NEWS SOURCES

- Overall, half of respondents (50%) think newspapers and magazines act with good intentions.
- Nearly four in five think so in India and Malaysia, but only one in five do in Hungary.

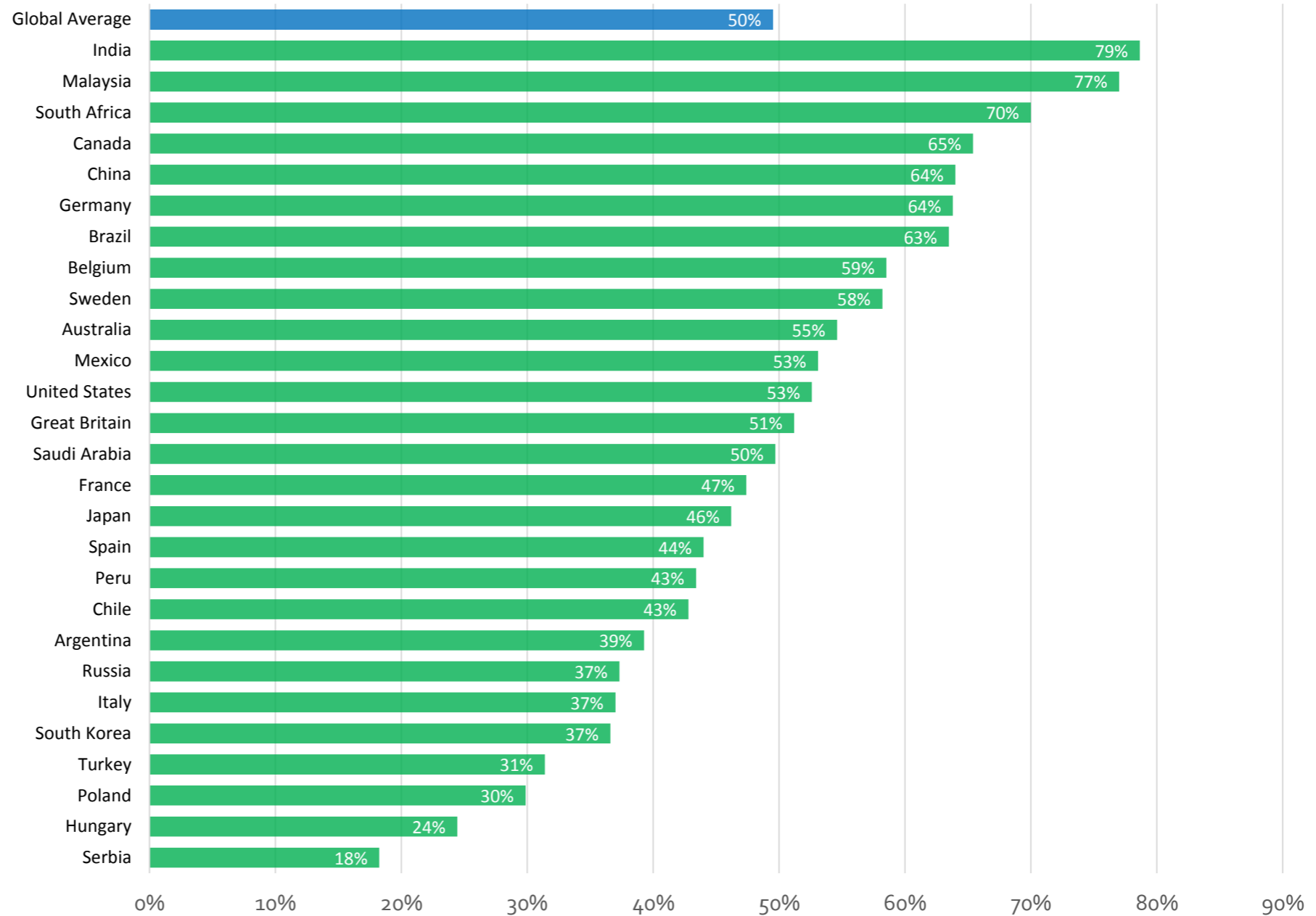
Q. To what extent, if at all, do you think each of the following act with good intentions when providing you with news and information?

Display of TOP 2 values

1 = "a great extent"

2 = "a fair extent"

NEWSPAPERS AND MAGAZINES



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

INTENTIONS OF NEWS SOURCES

- Similar to newspapers and magazines, about half (52%) believe TV and radio acts with good intentions with the news they provide.
- It's a view shared by as many as about three in four Malaysians, but only about one in four Serbs and Hungarians.

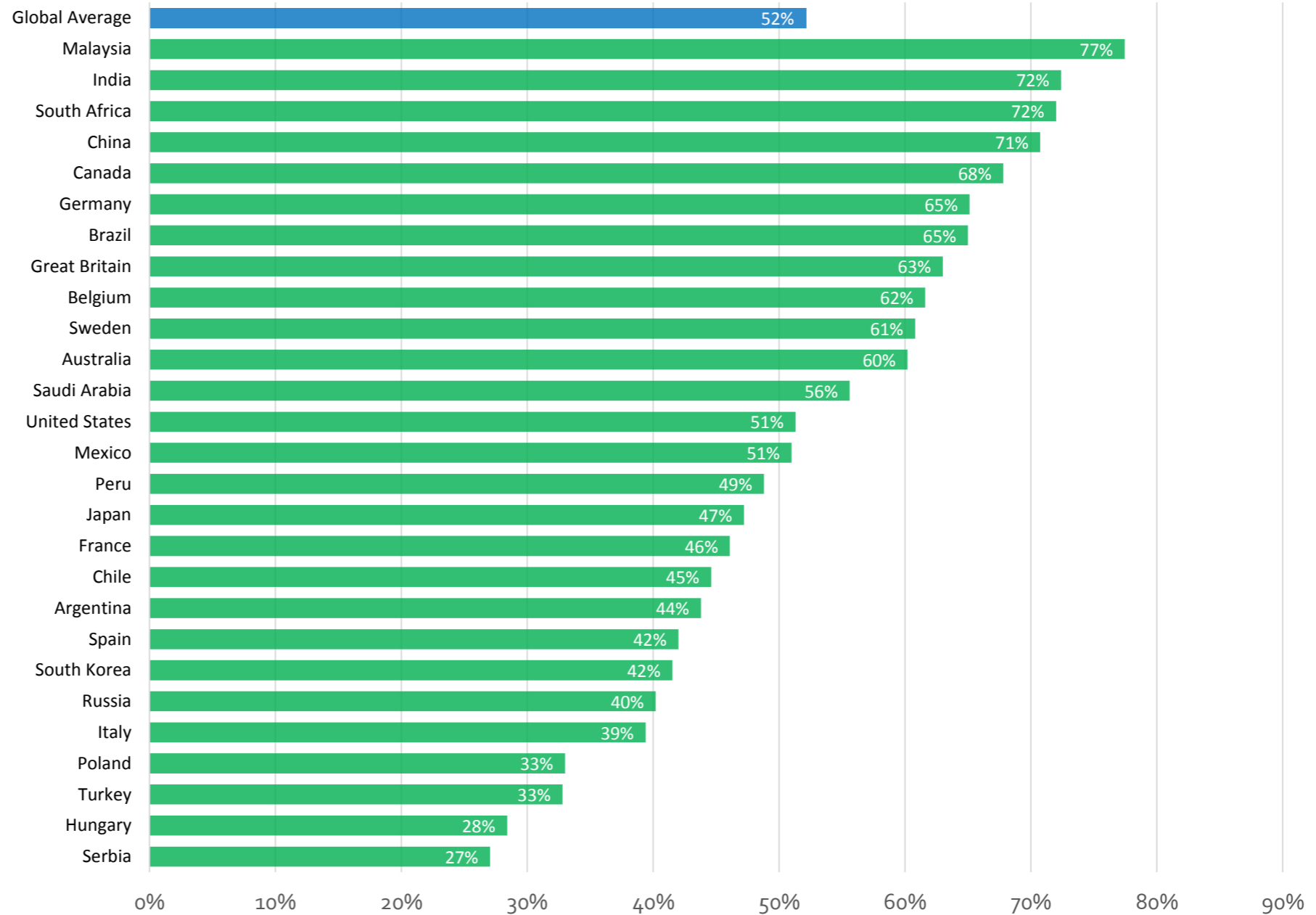
Q. To what extent, if at all, do you think each of the following act with good intentions when providing you with news and information?

Display of TOP 2 values

1 = "a great extent"

2 = "a fair extent"

TELEVISION AND RADIO



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

INTENTIONS OF NEWS SOURCES

- *Similar to traditional media, half of all those surveyed globally (49%) perceive online news websites and platforms as acting on good intentions*

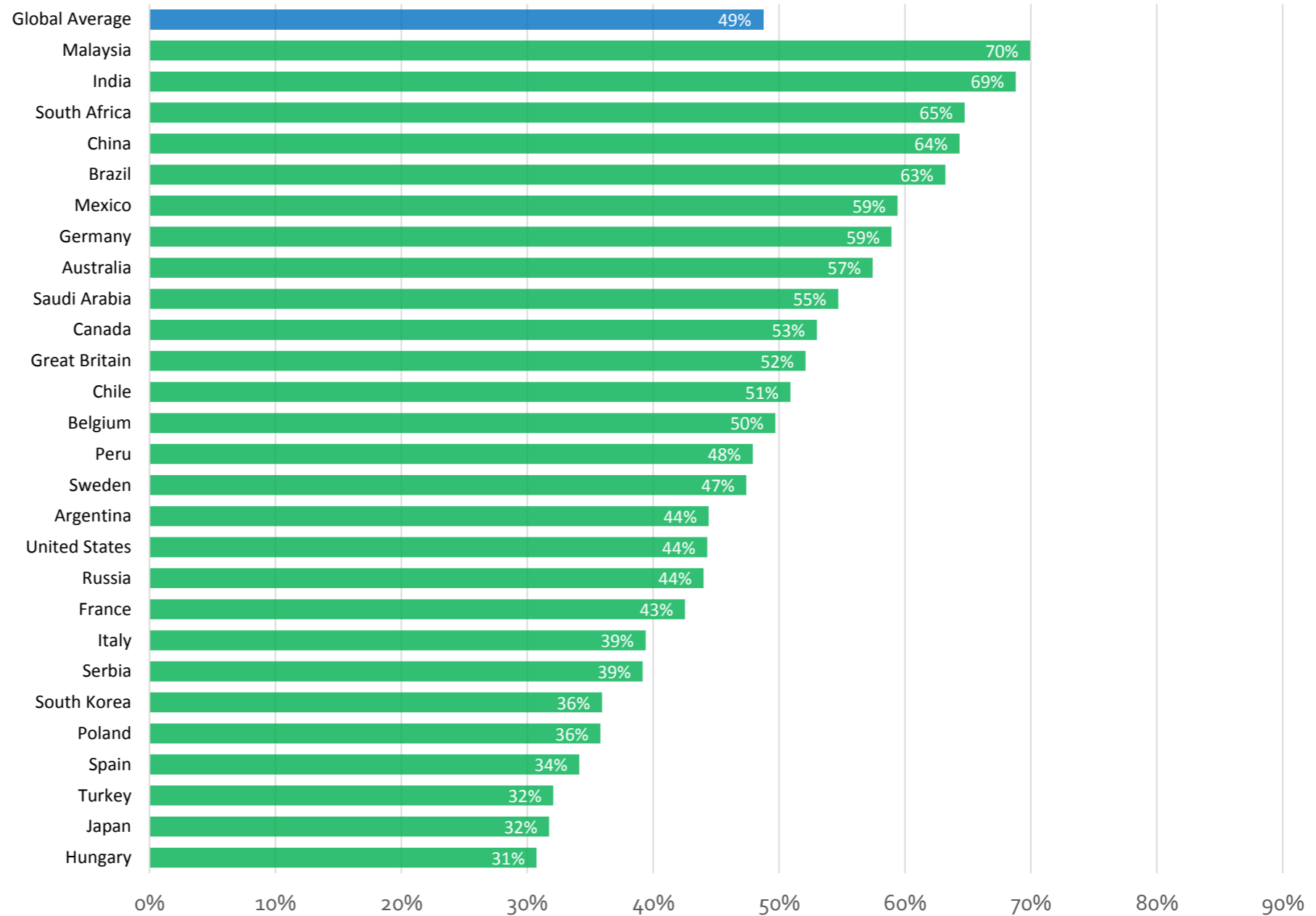
Q. To what extent, if at all, do you think each of the following act with good intentions when providing you with news and information?

Display of TOP 2 values

1 = "a great extent"

2 = "a fair extent"

ONLINE NEWS WEBSITES AND PLATFORMS



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

INTENTIONS OF NEWS SOURCES

- *Globally, only 39% think people they know predominantly through the internet act with good intentions when it comes to sharing news and information.*

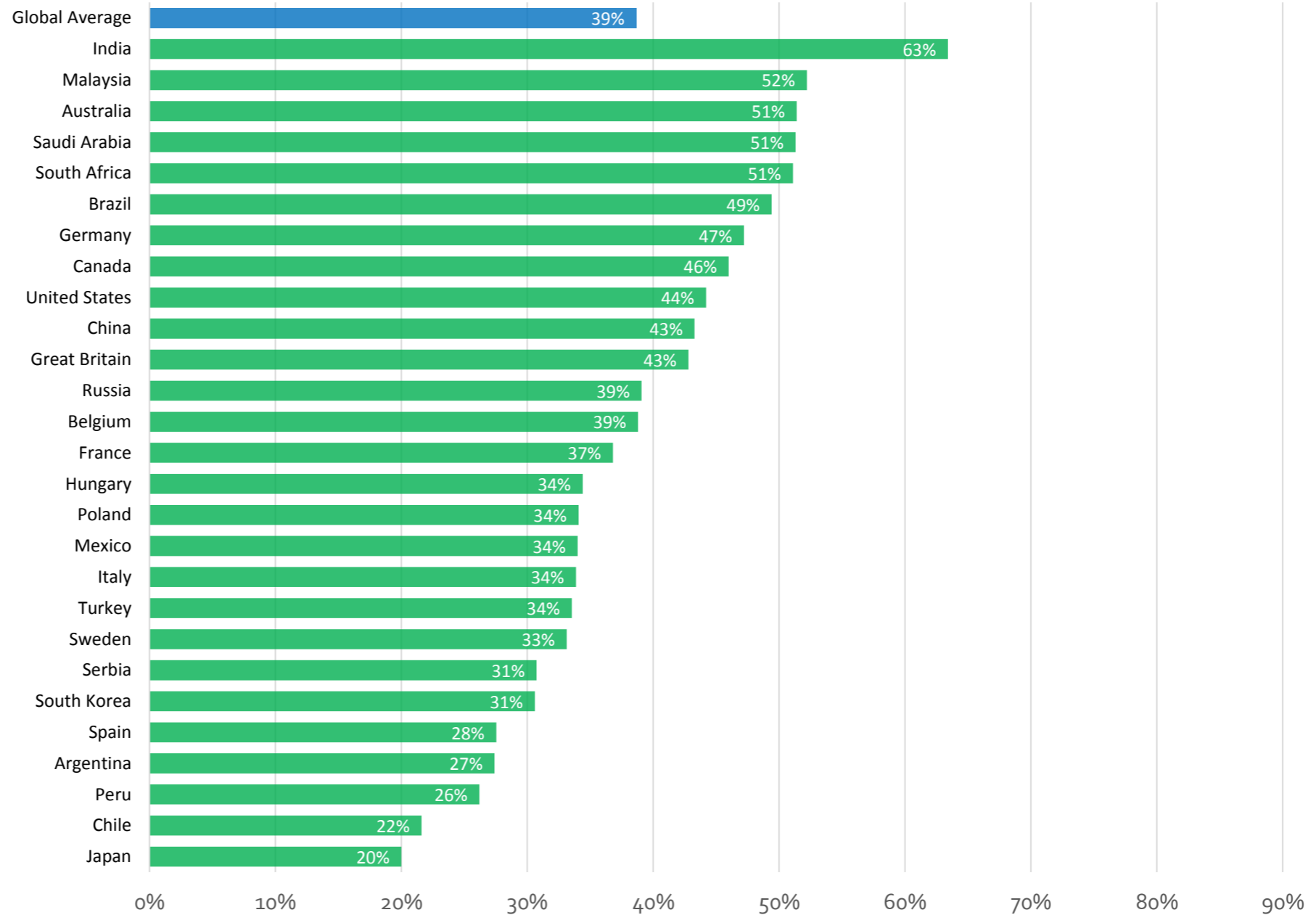
Q. To what extent, if at all, do you think each of the following act with good intentions when providing you with news and information?

Display of TOP 2 values

1 = "a great extent"

2 = "a fair extent"

PEOPLE I KNOW PREDOMINANTLY THROUGH THE INTERNET



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

INTENTIONS OF NEWS SOURCES

- Globally, seven in ten consumers (72%) feel people they know are well-intended when it comes to sharing news and information.
- The highest levels of perceived benevolence about personal contacts are seen in Australia, Canada, Malaysia, Germany and the U.S.; the lowest in Chile and Japan.

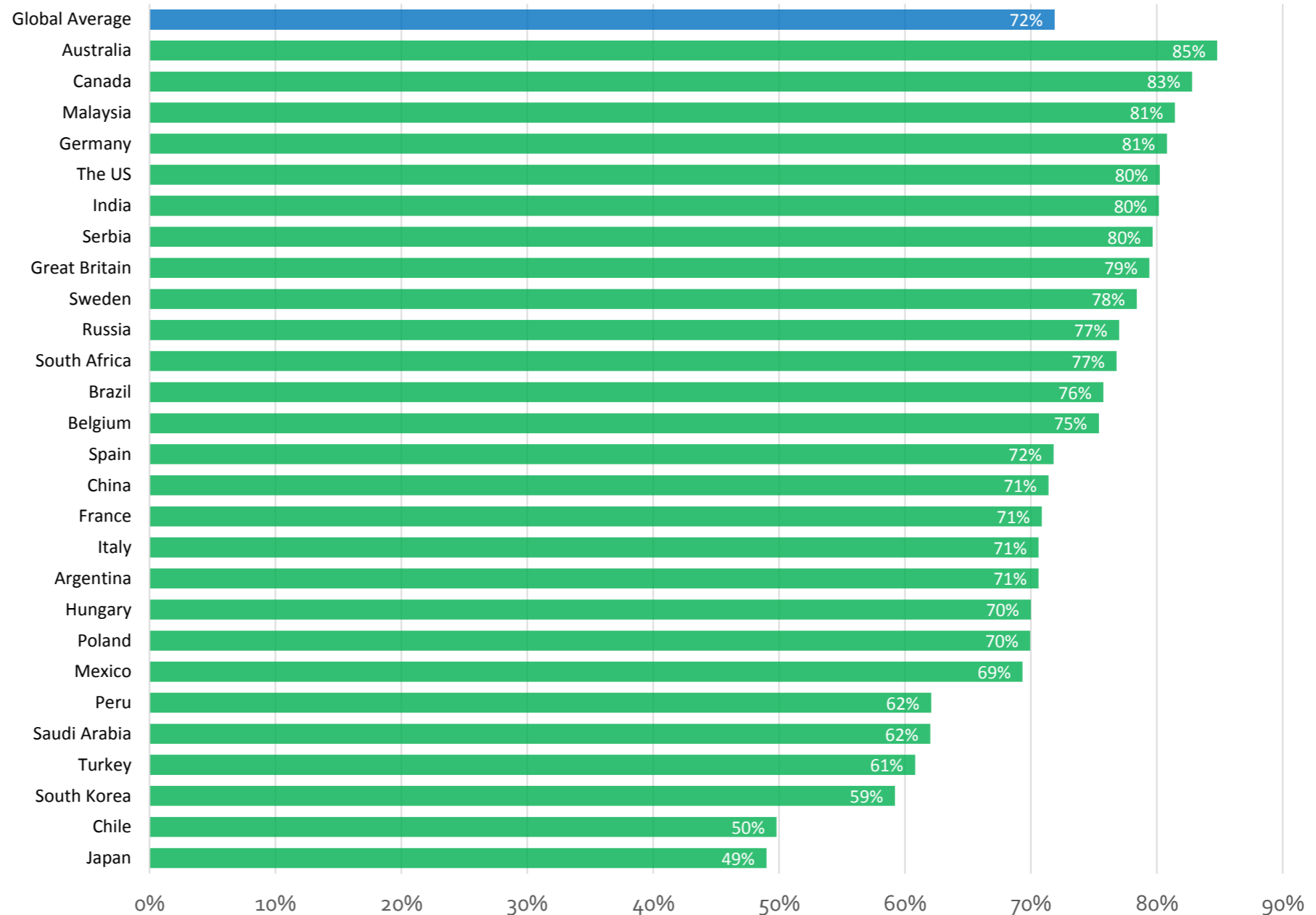
Q. To what extent, if at all, do you think each of the following act with good intentions when providing you with news and information?

Display of TOP 2 values

1 = "a great extent"

2 = "a fair extent"

PEOPLE I KNOW PREDOMINANTLY IN PERSON



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

Summary: Intentions of News Sources

- Across all countries, belief they act with good intentions when providing information ranges from 72% for personal contacts to 39% for people only known through the internet.

Q. To what extent, if at all, do you think each of the following act with good intentions when providing you with news and information?

Display of TOP 2 values

1 = "a great extent"

2 = "a fair extent"

INTENTION BY COUNTRY AND SOURCE

	Global Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	China	France	Germany	Great Britain	Hungary	India	Italy	Japan	Malaysia	Mexico	Peru	Poland	Russia	Saudi Arabia	Serbia	South Africa	South Korea	Spain	Sweden	Turkey	United States
Newspapers and magazines	50%	39%	55%	59%	63%	65%	43%	64%	47%	64%	51%	24%	79%	37%	46%	77%	53%	43%	30%	37%	18%	50%	70%	37%	44%	58%	31%	53%
Television and radio	52%	44%	60%	62%	65%	68%	45%	71%	46%	65%	63%	28%	72%	39%	47%	77%	51%	49%	33%	40%	27%	56%	72%	42%	42%	61%	33%	51%
Online news websites and platforms	49%	44%	57%	50%	63%	53%	51%	64%	43%	59%	52%	31%	69%	39%	32%	70%	59%	48%	36%	44%	39%	55%	65%	36%	34%	47%	32%	44%
People I know predominantly through the internet	39%	27%	51%	39%	49%	46%	22%	43%	37%	47%	43%	34%	63%	34%	20%	52%	34%	26%	34%	39%	31%	51%	51%	31%	28%	33%	34%	44%
People I know predominantly in person	72%	71%	85%	75%	76%	83%	50%	71%	71%	81%	79%	70%	80%	71%	49%	81%	69%	62%	70%	77%	80%	62%	77%	59%	72%	78%	61%	80%

Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

Trust in Public Vs. Private Broadcasters

Do citizens trust public broadcasters more than private-sector ones?

IPSOS GLOBAL ADVISOR

GAME CHANGERS



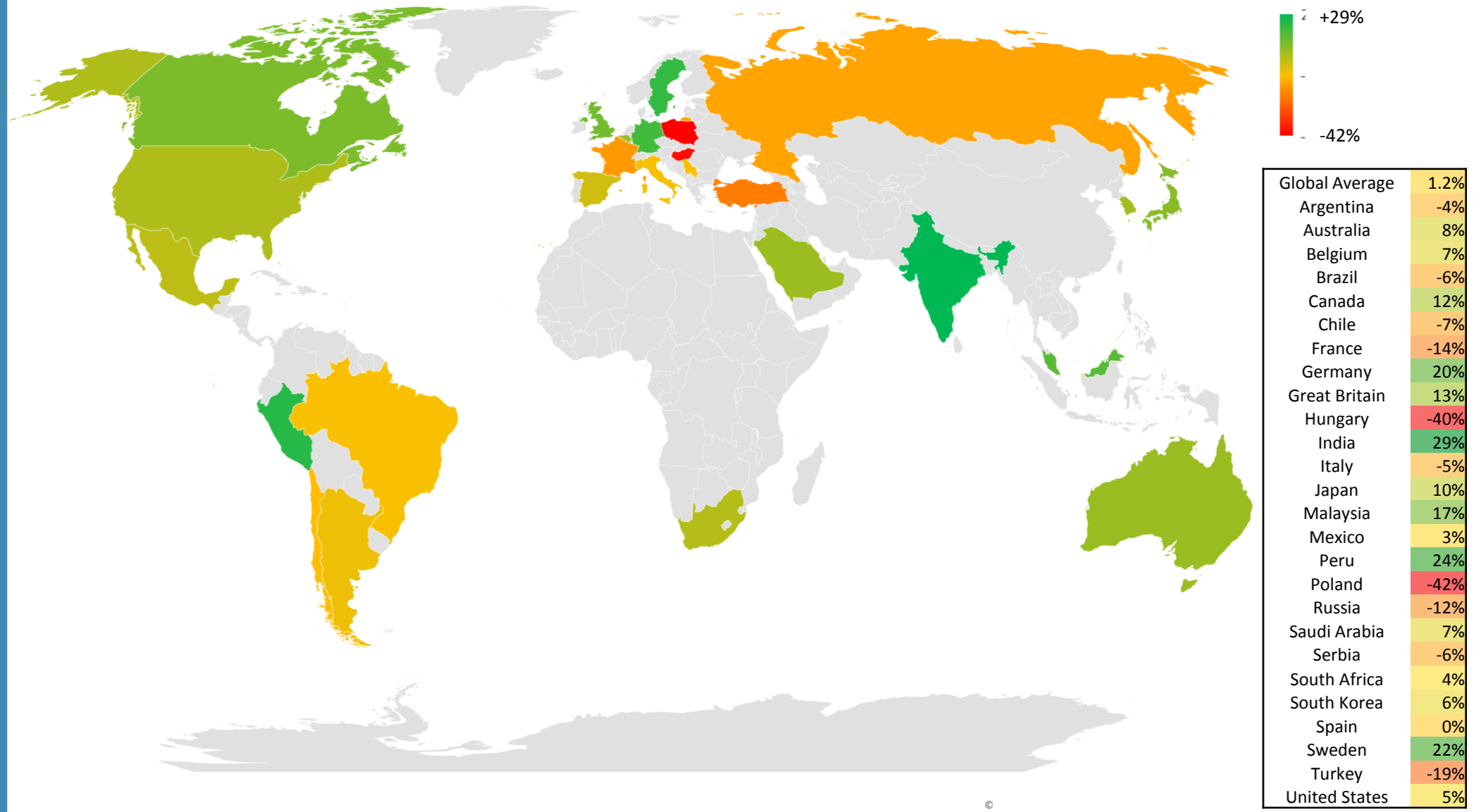
© 2019 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and *may not be* disclosed or reproduced without the prior written consent of Ipsos.

TRUST IN PUBLIC VS. PRIVATE BROADCAST

- Opinions vary widely across the world as to whether public broadcasters are more or less trustworthy sources of news and information than private ones.
- Public broadcasters lead private broadcasters widely in India, Peru, and Sweden, but lag behind them most in Poland and Hungary.

Q. Do you trust public TV and radio broadcasters any more or any less than private-sector TV and radio broadcasters as sources of news and information?

Net Score: % trust public broadcasters more than private, minus % trust public broadcasters less. A **positive** value indicates more trust in public broadcasters over private ones.



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

Perceptions of Public Broadcasters

To what extent do citizens agree or disagree with certain statements regarding news providers and sources?

IPSOS GLOBAL ADVISOR

GAME CHANGERS



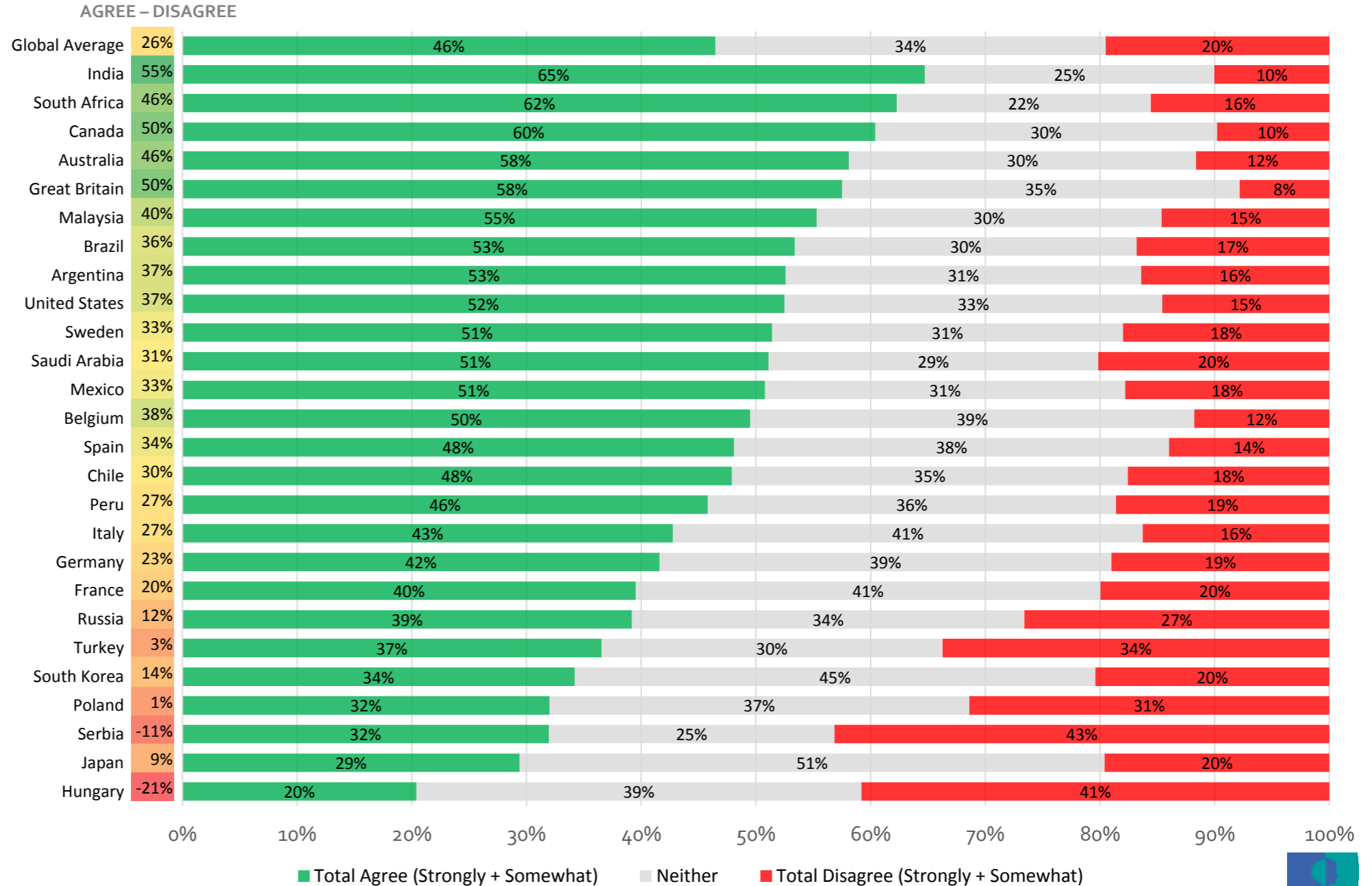
© 2019 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and *may not be* disclosed or reproduced without the prior written consent of Ipsos.

A NECESSARY SERVICE?

- Globally, almost half of those surveyed agree that public TV and radio broadcasters provide a necessary service.
- Agreement ranges from two-thirds in India (65%) to just 20% in Hungary and 29% in Japan.

Q. How much do you agree or disagree that public TV and radio broadcasters... Provide a necessary service?

HOW MUCH DO YOU AGREE OR DISAGREE THAT PUBLIC TV AND RADIO BROADCASTERS... PROVIDE A NECESSARY SERVICE?



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019



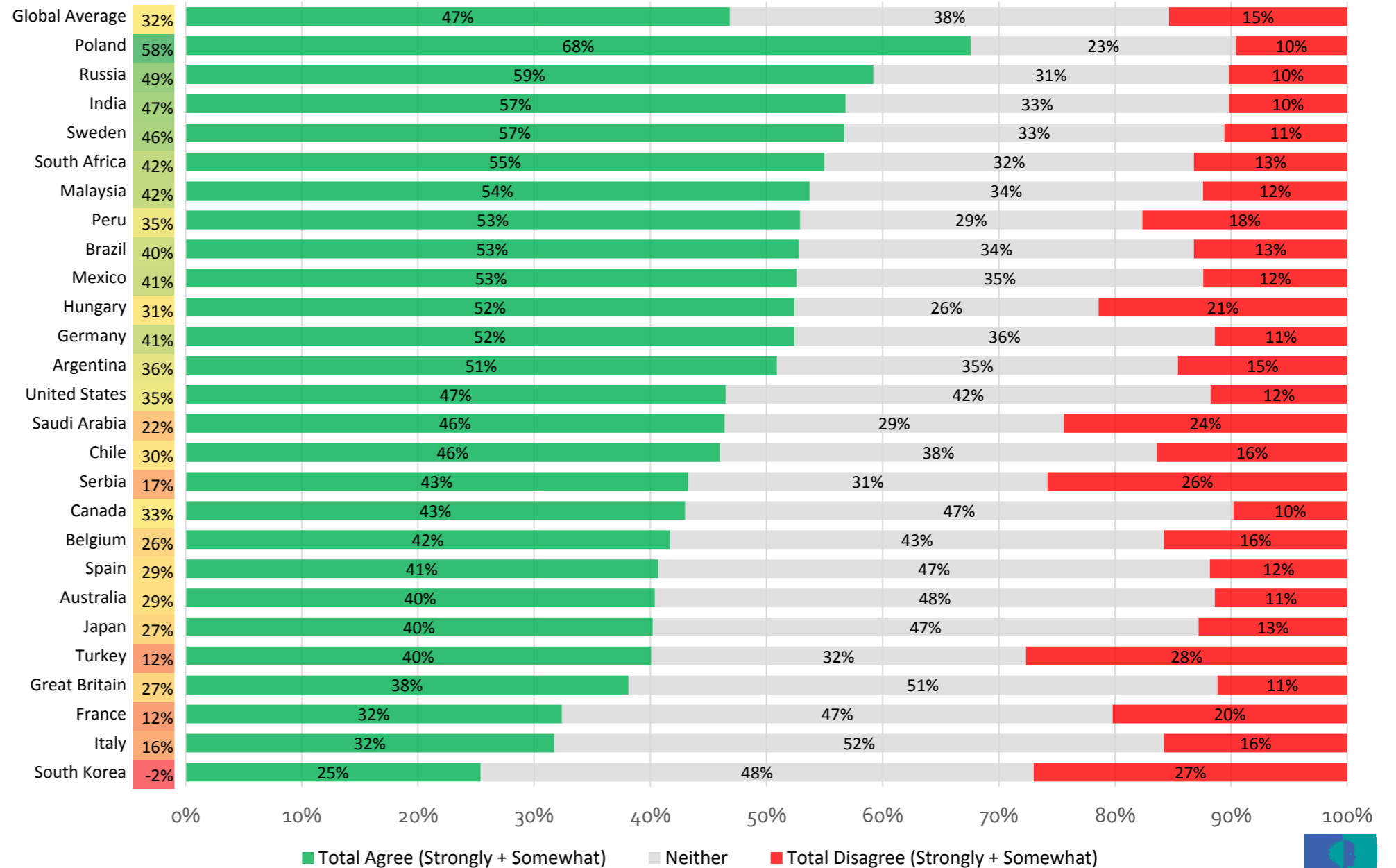
DIFFERENT?

- 47% of global respondents agree that public TV and radio broadcasters are different from private ones.
- Notably, a plurality of the population in several countries neither agrees nor disagrees with the statement.

Q. How much do you agree or disagree that public TV and radio broadcasters... Are different from private broadcasters?

HOW MUCH DO YOU AGREE OR DISAGREE THAT PUBLIC TV AND RADIO BROADCASTERS... ARE DIFFERENT FROM PRIVATE BROADCASTERS?

AGREE – DISAGREE



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

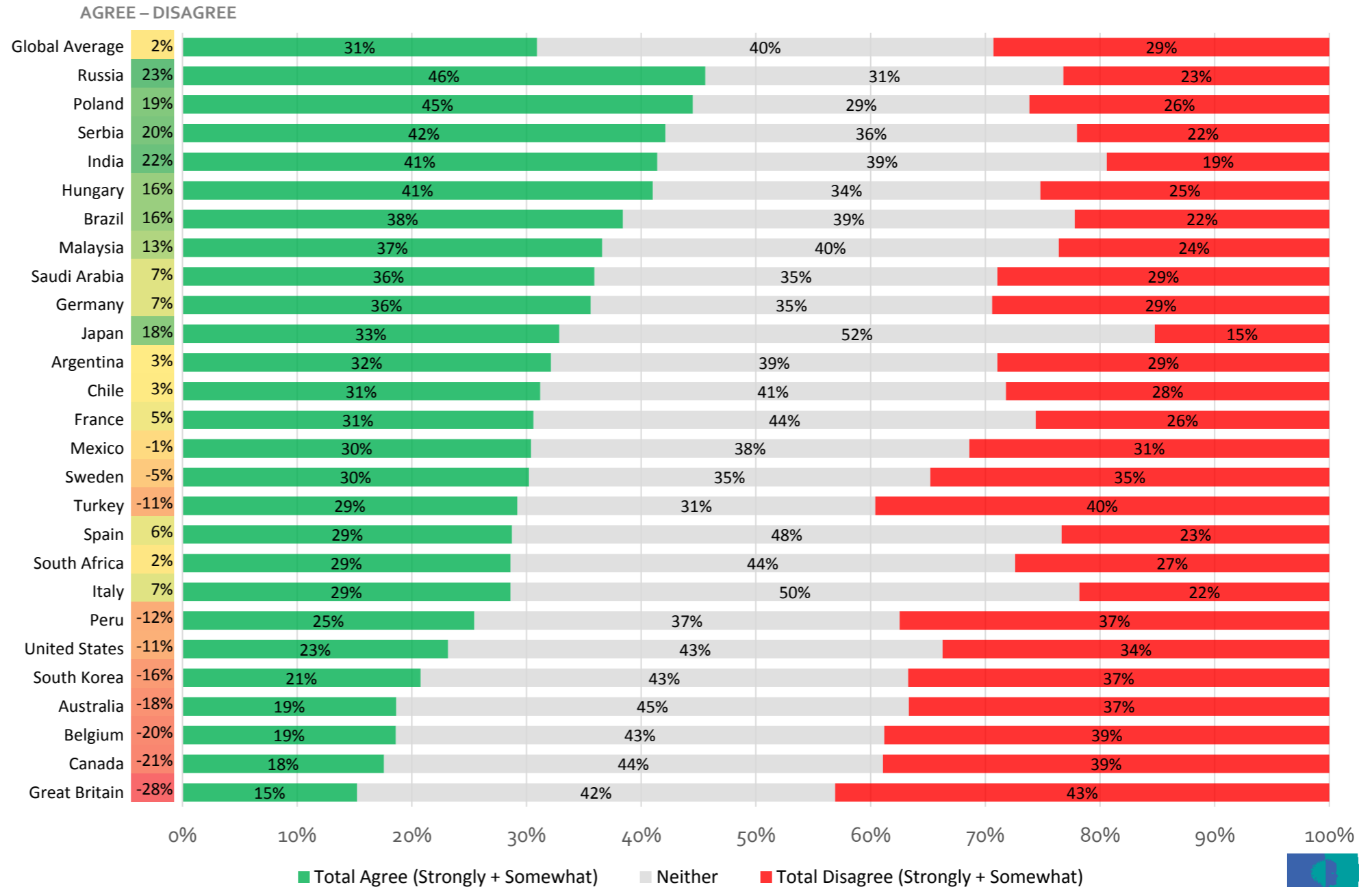


OBSOLETE?

- Globally, opinion is evenly split on whether public broadcasters are obsolete (31%) or not (29%), but 40% neither agree nor disagree.
- Agreement is highest in Eastern Europe and lowest in Great Britain, Canada, Belgium, and Australia.

Q. How much do you agree or disagree that public TV and radio broadcasters... Are obsolete?

HOW MUCH DO YOU AGREE OR DISAGREE THAT PUBLIC TV AND RADIO BROADCASTERS... ARE OBSOLETE?



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

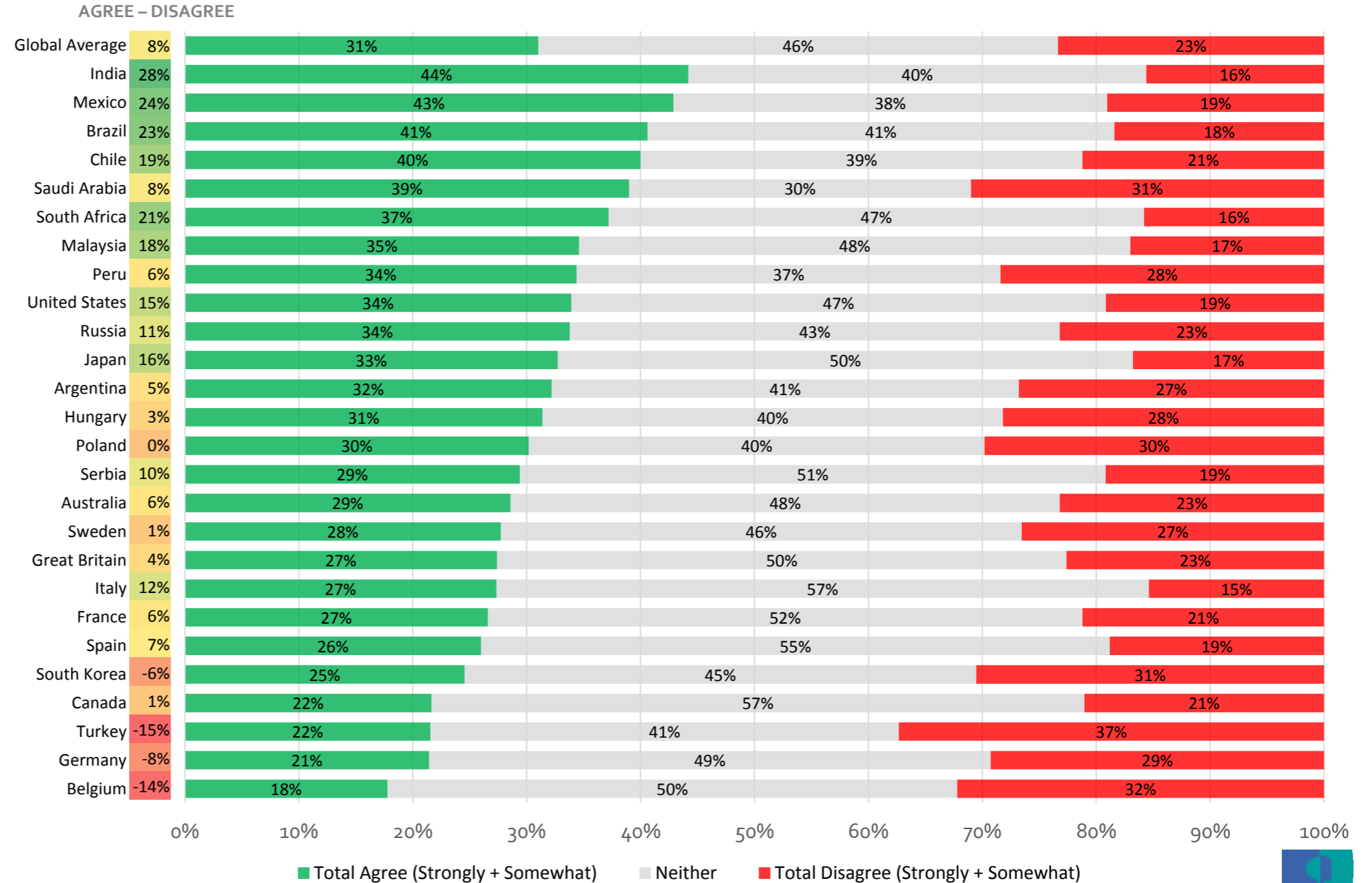


ELITIST?

- Globally, less than one-third (31%) agree that public TV and radio broadcasters are overly elitist. Nearly half (46%) neither agree nor disagree.
- India, Mexico, and Brazil are the countries where agreement is highest, Belgium is where it is lowest.

Q. How much do you agree or disagree that public TV and radio broadcasters...
Are overly elitist?

HOW MUCH DO YOU AGREE OR DISAGREE THAT PUBLIC TV AND RADIO BROADCASTERS... ARE OVERLY ELITIST?



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

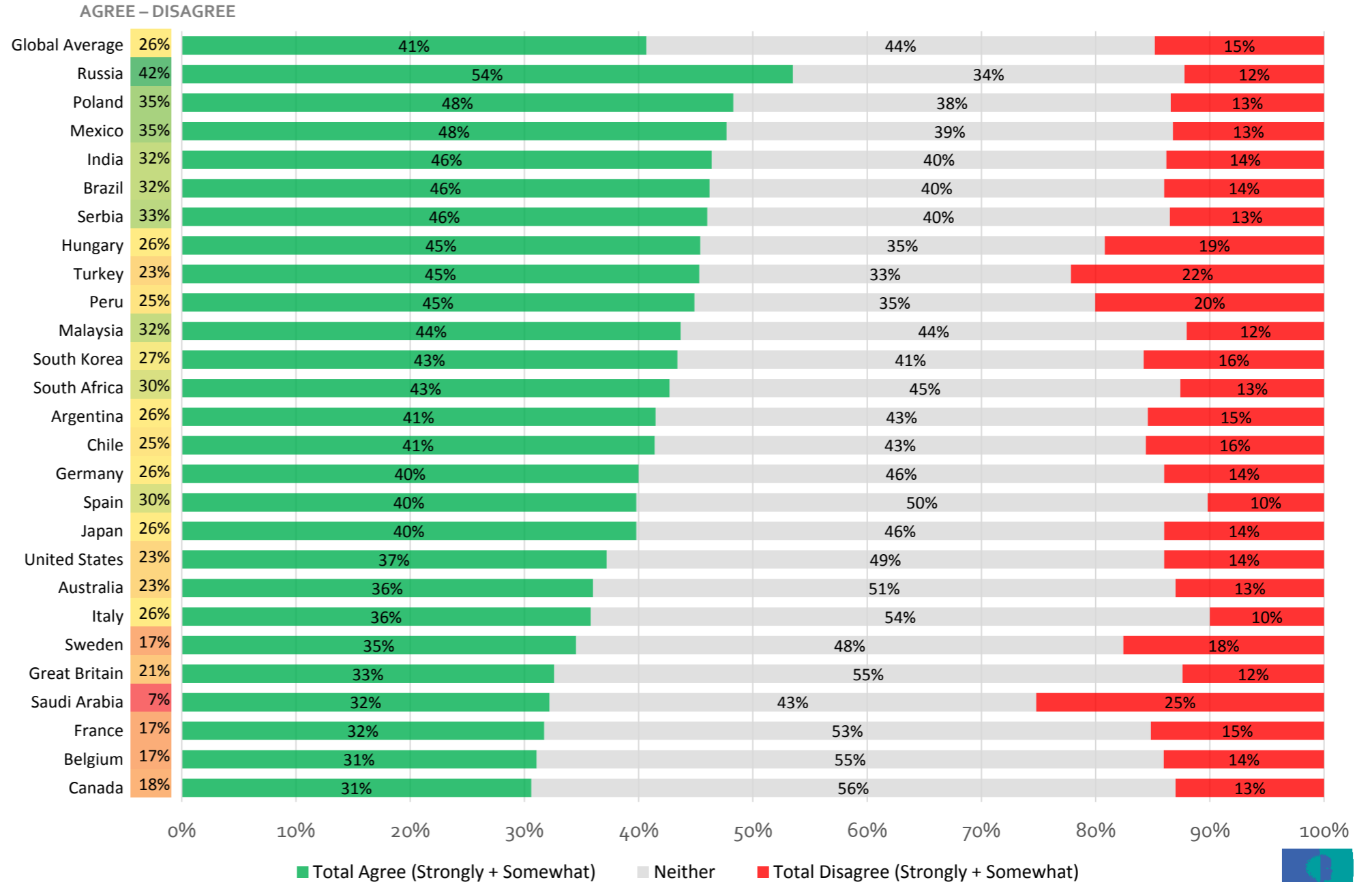


BUREAUCRATIC?

- In all countries, more people agree with the statement that public TV and radio broadcasters are bureaucratic than disagree.
- However, in many countries about half of those surveyed neither agree nor disagree.

Q. How much do you agree or disagree that public TV and radio broadcasters...
Are bureaucratic?

HOW MUCH DO YOU AGREE OR DISAGREE THAT PUBLIC TV AND RADIO BROADCASTERS... ARE BUREAUCRATIC?



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019

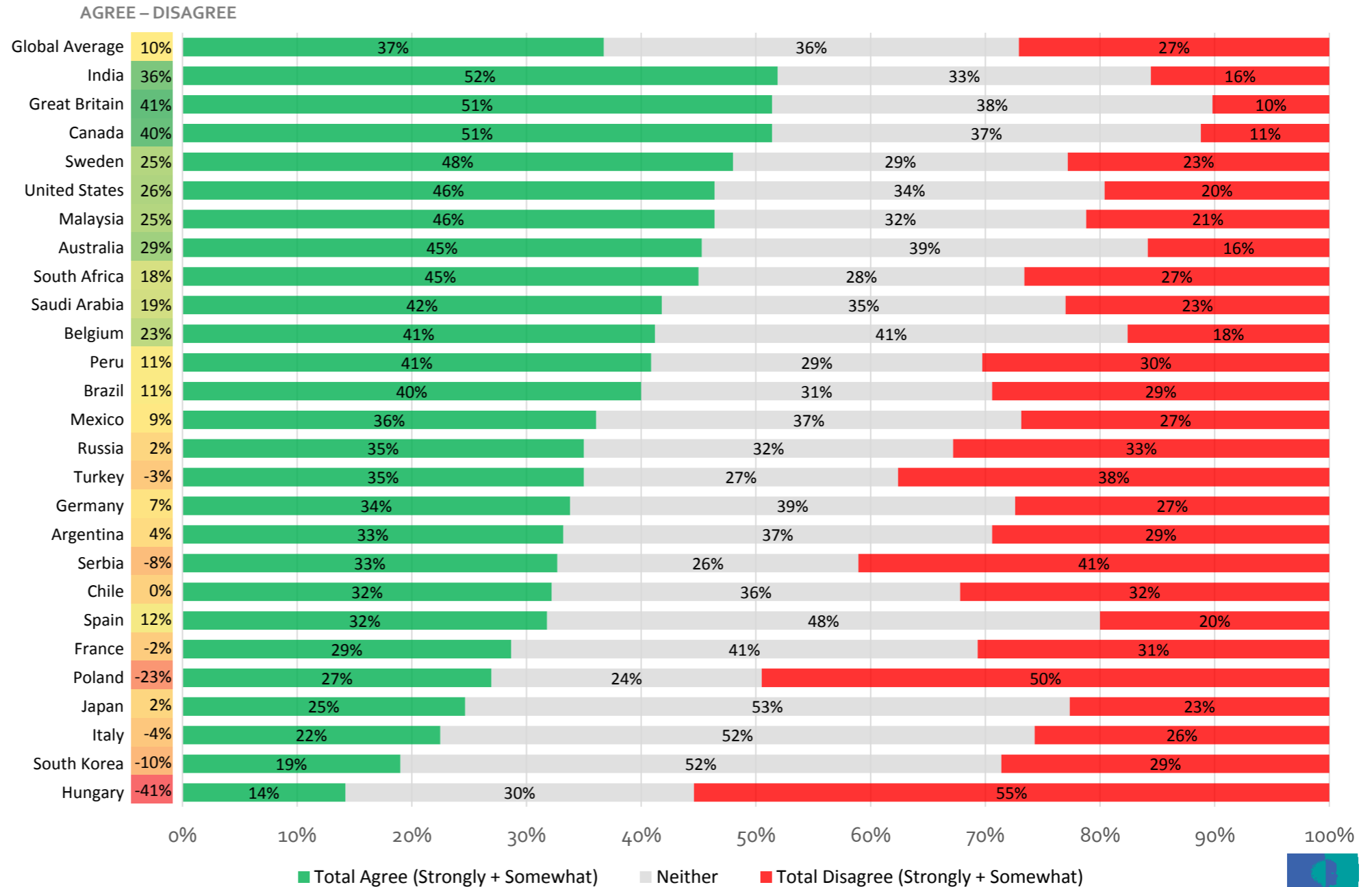


QUALITY PROGRAMMING?

- 37% of people across the world agree that public TV and radio broadcasters offer quality programming; 27% disagree.
- Far more agree than disagree in India, Great Britain and Canada, while the reverse is true in Hungary and Poland.

Q. How much do you agree or disagree that public TV and radio broadcasters... Offer quality programming?

HOW MUCH DO YOU AGREE OR DISAGREE THAT PUBLIC TV AND RADIO BROADCASTERS... OFFER QUALITY PROGRAMMING?



Base: 19,541 online adults aged 16-74 (18-74 in select countries) across 27 countries, from January 25 – February 8, 2019



- These are the findings of an Ipsos online survey conducted between January 25 and February 8, 2019.
- The survey was conducted in 27 countries around the world, via the Ipsos Online Panel system in Argentina, Australia, Belgium, Brazil, Canada, Chile, China, France, Germany, Great Britain, Hungary, India, Italy, Japan, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Spain, Sweden, Turkey, and the United States.
- The results are comprised of an international sample of 19,541 adults ages 16-74 in most countries, ages 18-74 in Canada, South Africa, Turkey, and the United States, and ages 19-74 in South Korea. Approximately 1000+ individuals participated on a country by country basis via the Ipsos Online Panel, with the exception of Argentina, Belgium, Hungary, India, Mexico, Poland, Russia, Saudi Arabi, South Africa, South Korea, Sweden, Turkey, Malaysia, Chile, Peru and Serbia, where each have a sample of approximately 500+.
- 15 of the 27 countries surveyed online generate nationally representative samples in their countries (Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, Poland, South Korea, Spain, Sweden, and United States).
- Brazil, China, Chile, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa and Turkey produce a national sample that is more urban & educated, and with higher incomes than their fellow citizens. We refer to these respondents as “Upper Deck Consumer Citizens”. They are not nationally representative of their country.
- Weighting was then employed to balance demographics and ensure that the sample's composition reflects that of the adult population according to the most recent country Census data, and to provide results intended to approximate the sample universe. A survey with an unweighted probability sample of this size and a 100% response rate would have an estimated credibility interval of +/-3.1 percentage points for a sample of 1,000 and an estimated credibility interval of +/- 4.5 percentage points 19 times out of 20 per country of what the results would have been had the entire population of adults in that country had been polled. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.

For more information, please contact:

Robert Grimm

Director of Ipsos Public Affairs, Germany

Robert.Grimm@ipsos.com

Nicolas Boyon

Senior Vice President, U.S.

Nicolas.Boyon@ipsos.com

Mallory Newall

Director, U.S.

Mallory.Newall@ipsos.com