

January 2019

IPSOS VIEWS

In media we trust?

How our views of the media are changing

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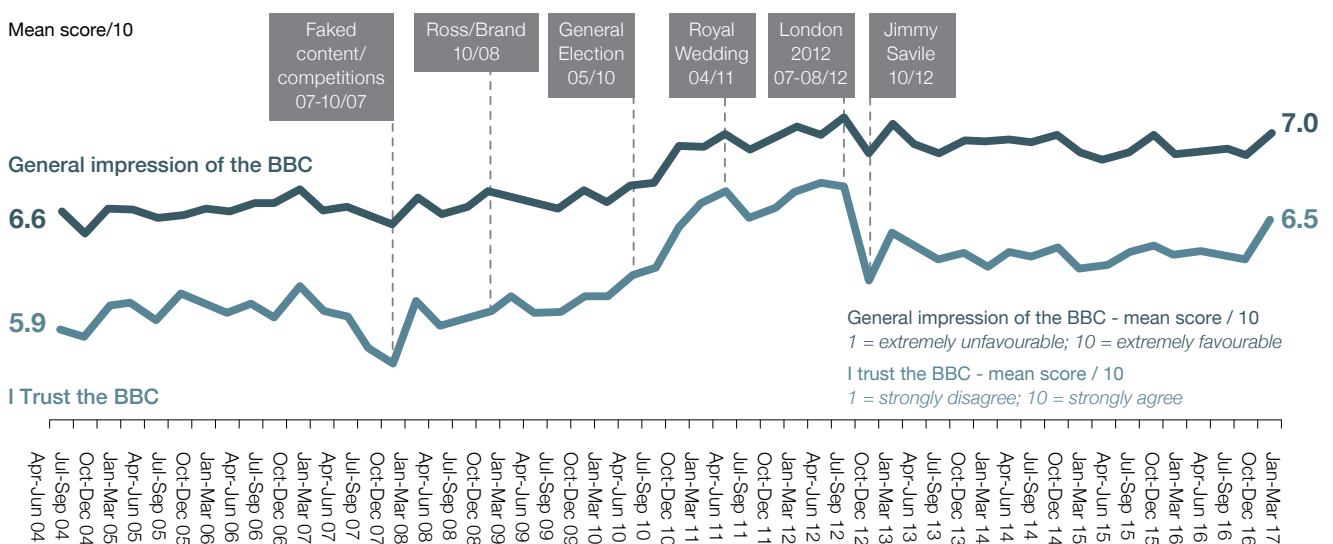
A crisis of trust is overblown – but there is a problem

“Fake News” shouts Donald Trump, as do millions of others on both the left and right. It was “Word of the Year” in 2017 after all. Globally, there is an increasing feeling that there is a crisis of trust in the media. And this has only been exacerbated by the growing concern (and problem) of ‘fake news’ circulating at the speed of light on social media, and scandals, such as the recent publication of the Cambridge Analytica files.

In fact, the truth is more complex. Different studies on the subject say different things; The Pew Research Center in the US has looked at news media and found that trust is divided along partisan lines and that levels are extremely low across all news media¹. The Edelman Trust Barometer announced that ‘public trust in media is at an all-time low.’¹ However, the 2018 Eurobarometer study² shows that across the EU trust in traditional media is high and stable, with only trust in social networks and the internet showing signs of decline.

Figure 1

Trust in the BBC is higher now than it was in 2004 ³



Similarly, in the UK we have no evidence of a collapse in trust. For example, trust in the BBC is now much higher than a decade ago (see Figure 1). Additionally, our own Ipsos Veracity Index,⁴ a UK study which has run since 1983, asks respondents how much they trust people working in different sectors to tell the truth. Whilst journalists have always ranked somewhere along the bottom it's interesting to note that trust in them is increasing, albeit slowly, over time.

At the beginning of 2018 we commissioned our own proprietary research to explore the issue. Using Ipsos' Global Advisor panel, we sought to discover for ourselves just how real the crisis of trust in media is, as well as undertaking a more extensive review of existing literature on the subject.

Surveying 27,000 people across 28 markets, our study asked respondents about their trust in media based on two factors: the perceived **character** and the perceived **competence** of five types of media, as well as their overall trust in each. Respondents were then asked about the perceived prevalence of "fake news" across each channel, as well as how they feel their levels of trust have changed over time. Our findings suggest that **globally, we cannot say there is a crisis of trust in the media.**

However, in established markets it appears that there is an issue with trust, if not a crisis, particularly focused on digital platforms.

What is trust?

Before moving onto the findings of our study it is important to clarify how we defined "trust" in the context of our relationship with media. We wanted to look more deeply at the term, and ensure that the questions we asked provided insight into how people arrive at a sense that they "trust" something – beyond simply saying whether they do or don't.

So, for this paper, we broadly defined trust as "a feeling of reasonable confidence in our ability to predict another's behaviour". What contributes to the development of that feeling, however, is more nuanced.

Whether we trust someone depends greatly on the returns we receive.

For example, the consequences of a doctor giving us incorrect medical advice are greater than an ad claiming to make you look younger; thus, the threshold for trust is higher.

What's unique about trust in the media, though, is its one-sidedness: When we visit a doctor, we expect to get sound medical advice in exchange for accurate descriptions of our symptoms. When it comes to news outlets, the only 'give' from our side is our attention – particularly as more and more outlets become free at the point of access.

So, in the absence of mutual accountability, how do we determine which media sources to trust?

We found the work of American author Stephen MR Covey on trust to be particularly helpful in directing our approach. His two-pronged model, that trust is built on perceived character and perceived competence, underlines that trust is not a unidimensional characteristic.

When we ask about how much a specific platform **acts with good intention** (character), in the context

of the media, this is attempting to understand people's perception of whether news outlets are acting with integrity, and are endeavouring to provide a thorough and balanced depiction of events that aims to broaden the recipients understanding. And when we ask if the platform **reliably meets its obligations** (competence) we hope to understand if people perceive news outlets to provide accurate coverage which delivers on the promise (explicit or implicit) made to the recipient.

In sum, it is important to understand that trust is multifaceted. Simply asking 'do you trust' will only provide very limited insight. A more nuanced understanding (and measurement) of trust should help media organisations understand better the challenges they face.

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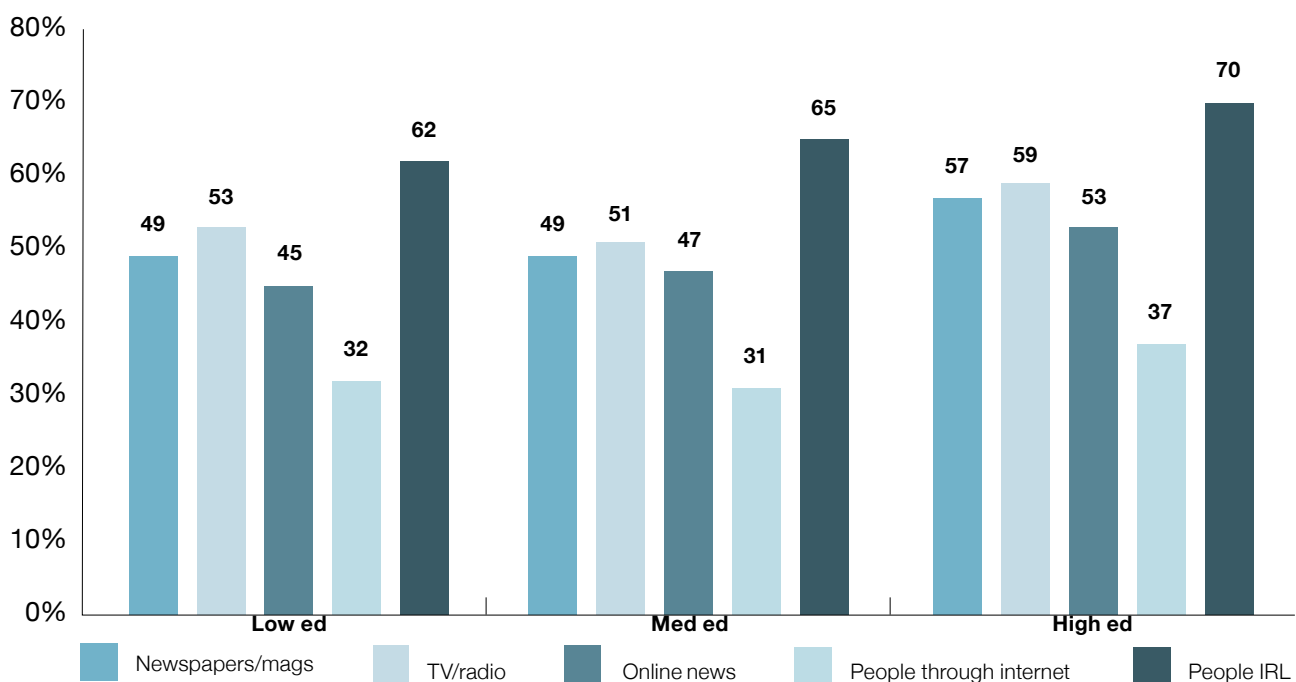
A global perspective of trust in media

The patterns that emerged across markets: Globally, the young (those under 35) are far more likely to trust digital platforms than those over 50 are. Conversely, Baby Boomers (broadly over 55s) are more likely to rate trust in TV/radio more positively than Millennials (broadly those in their 30s). When it comes to print media (newspapers/magazines) however, trust is consistent across all age groups.

Differences amongst respondents of varying education are inconclusive at a global level although those with higher degrees of education are more likely to trust media of all channels. And it's this observation, that those with lower education levels globally trust all media less, which is powerful and interesting (see Figure 2).

Figure 2

Trust in media x education



Base: an international sample of 19,060 adults aged 16-64 in 24 countries, were interviewed between 22 December 2017 and 5 January 2018

Trust in the media

Around the world, people have the most trust in people they know in real life, followed by TV/radio, newspapers/magazines, websites, and finally, people they know through the internet. Lower levels of trust in digital communication may in part reflect the lower barriers to entry which impact on perceptions of quality and rigour versus TV, radio and print - traditional media - which are expensive to produce and the outlets limited. But **the biggest differences**

in trust appear when comparing emerging and established markets. Trust in emerging markets is marginally higher overall, but also a net positive – that is to say, more people say their trust in the media has grown in the past five years than say it has decreased.

This is not the case for established markets, where the share of people who say they trust media less than they did five years ago exceeds the share of those

Figure 3

Claimed change in trust over the last five years

	Great Britain	North America	LATAM	Europe	APAC	ME/ Africa	Emerging Markets	Established Markets
Print	-21	-6	-4	-19	-2	-7	-1	-16
TV/Radio	-12	-8	-5	-18	0	-4	0	-15
Websites	-18	-10	6	-13	1	-3	5	-12
People - internet	-8	-8	-8	-14	-2	-2	-3	-12
People - real life	10	12	22	6	16	11	20	7

Q: How much would you say your level of trust in the following has changed over the past five years?

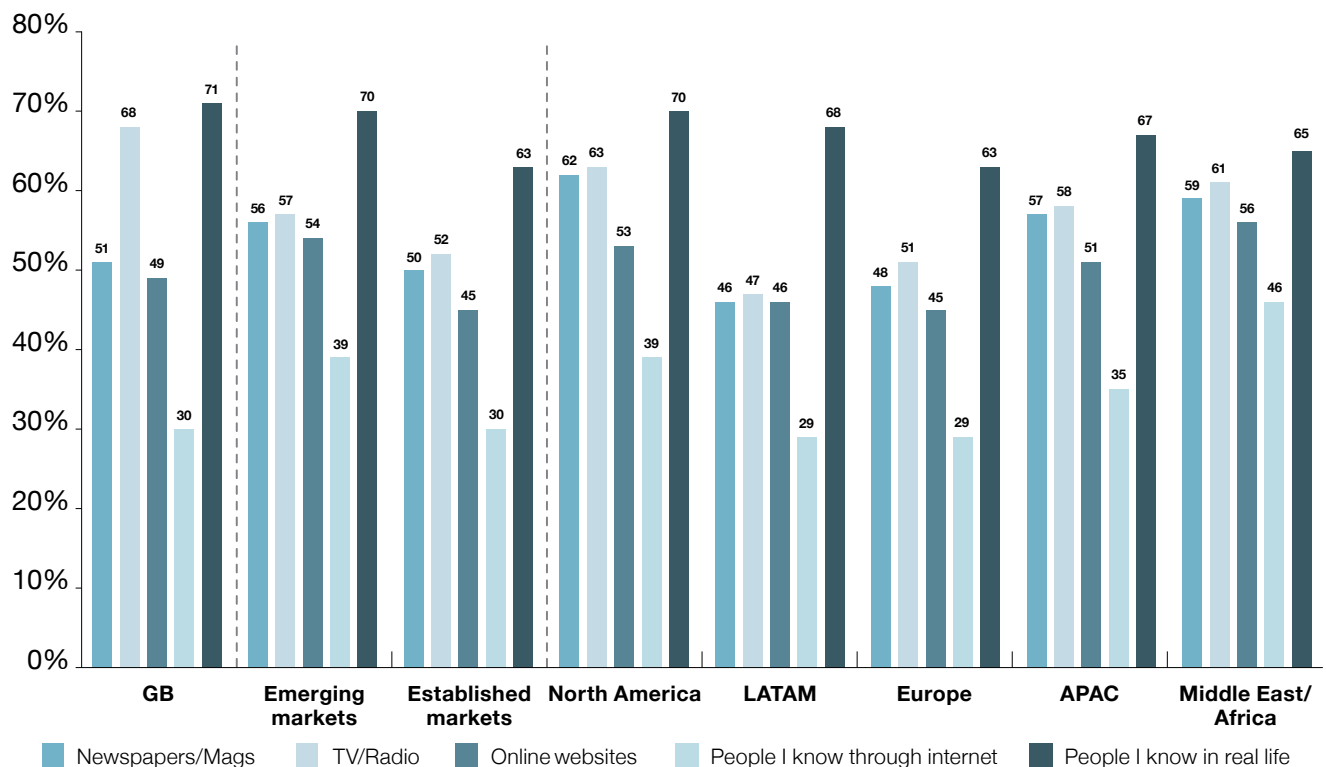
Base: an international sample of 19,060 adults aged 16-64 in 24 countries, were interviewed between 22 December 2017 and 5 January 2018

who say they trust it more by ~15pts. However, it is important to point out that this decline is self-claimed and not tracked over time. Tracked figures on trust in the media, as measured by the Eurobarometer across Europe shows no significant decline in traditional media with a decline in trust over time limited to the internet and social media.

In the Perils of Perception⁵, Bobby Duffy demonstrates that people do indeed have a tendency to think ‘things are getting worse’. He points to the media as exacerbating this tendency towards ‘rosy introspection’ because bad news sells. Arguably, however, it is still important to consider and reflect on the fact that in established markets, people feel their trust in the media is in decline.

Figure 4

Trust in media by region (% a great deal/fair amount)



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

Base: an international sample of 19,060 adults aged 16-64 in 24 countries, were interviewed between 22 December 2017 and 5 January 2018

What's interesting to note is that regression analysis⁶ performed on the data indicates that, when it comes to people, (known through the internet or in real life), the perceived competence of information (reliability) given is more important in determining overall trust than the character of the person giving it (do they act with good intentions?).

This perhaps underlines the increasing problem of 'confirmation bias' exacerbated by the echo chambers social media produces and what is often considered to be an increasing 'toxicity' of debate on these platforms.⁷ Our findings suggest not so much a crisis of trust as a crisis of media. How does any outlet 'prove' their validity in a world where a source's track record of character (good intentions) is less important than the appeal of its content?

Contributing factors of media scepticism

But what are the specific areas in the media that are the trust 'troublemakers'?

Many of the issues are rooted in the sheer wealth of information available on digital platforms. When confronted with thousands of websites all claiming to report "the news," how is one to know which content is real, and which is, simply, "fake news" ?

Pre-internet, the gatekeepers of content and the way in which content was disseminated was tightly controlled. Media owners were large corporate

monoliths, journalists were often unionised, and content production was limited. Content was partisan by newspaper or by media owner, but it was manageable. There was a sense that you 'knew what you were getting.'

But, there have been many valuable outcomes from the democratisation of content afforded by the internet. Particularly giving marginalised voices a real platform for the first time. Some would argue that overall it is good for democracy – the traditional gatekeepers have lost their power in owning communication channels. As has been seen with #blacklivesmatter, the #metoo movement, and unexpected electoral victories, social media has become a tremendously powerful way of communicating and accessing ideas that are not felt to be adequately presented by traditional media sources.

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Conversely, digital platforms are laden with algorithms to determine which content is shown to each user. So, in ‘liking’ a set of far-right tweets, a user is likely to be served more and more of what they ‘like’. And by showing content that affirms a worldview, Twitter is likely to increase engagement, but also potentially limit exposure to alternative points of view.

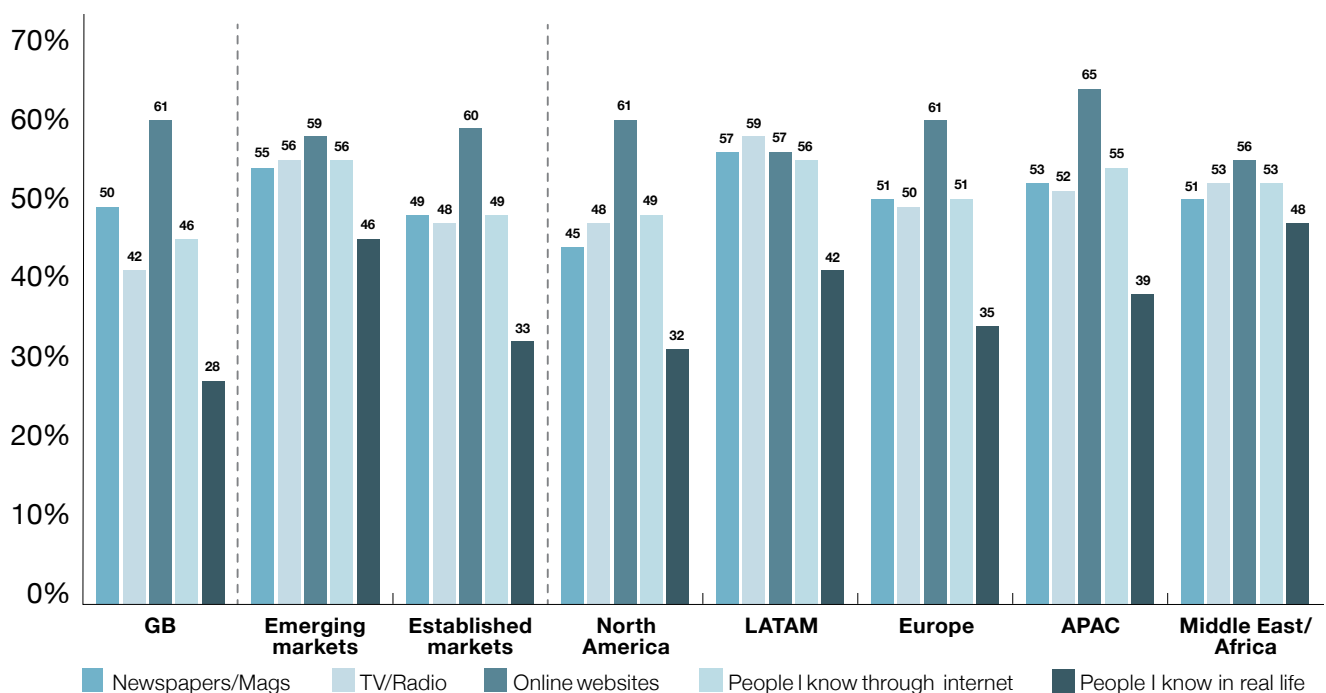
Around the world, the existence of “fake news” is deemed to be highest on websites. Although, in

emerging markets – such as LATAM and Middle East/ Africa – levels are nearly as high for all other forms of media, with “people I know in real life” the sole source to have fewer than 50% of respondents citing a great/ fair extent of fake news.

It should be a relief to traditional outlets that, despite the onslaught of internet-based sources, perceptions of fake news on TV/radio and in newspapers/magazines are significantly lower than online sources everywhere in North America, Europe, and APAC.

Figure 5

Perceived prevalence 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? (A great deal/fair extent)

Base: an international sample of 19,060 adults aged 16-64 in 24 countries, were interviewed between 22 December 2017 and 5 January 2018

However, reported prevalence of fake news appears to have little relationship with overall trust in media. The strongest relationship is found for people known predominantly through the internet, with a correlation strength of 28% – hardly enough to explain any perceived crisis of trust in media. So where is it coming from, if not solely from the onslaught of “fake news”?



What else might cause trust in media to fluctuate?

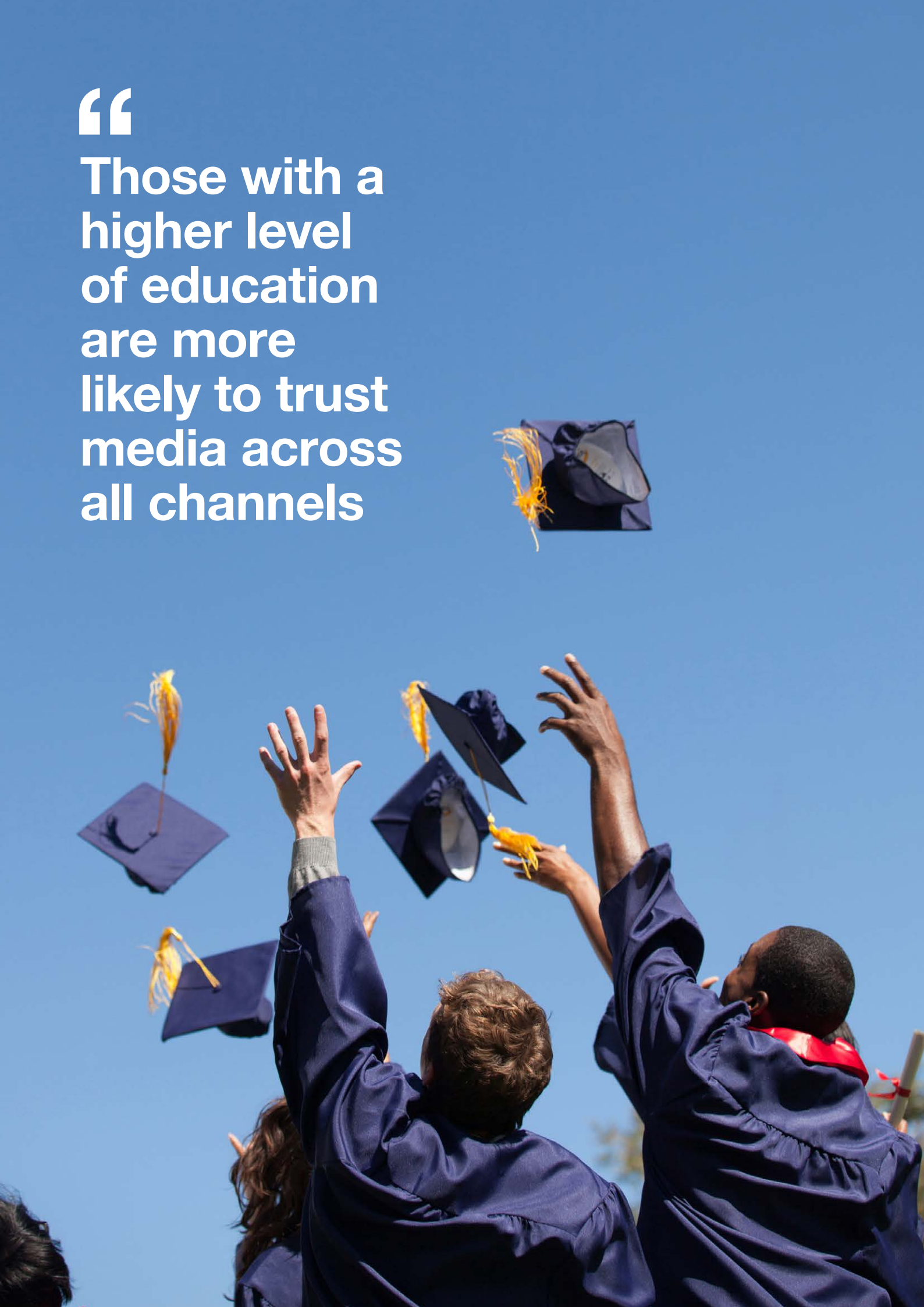
The growing perception of distrust in the media in established markets cannot be attributed purely to the digitisation and proliferation of media. Arguably, there are other forces at play that are contributing to this feeling.

Brands/industries behaving badly: The perceived untouchability of the financial services industry following the 2008 crisis a decade ago rocked people’s relationships with established brands that were previously respected, valued, and trusted. On top of this globalised corporate tax avoidance, and numerous other scandals over the last decade have accentuated cognitive dissonance and led to a growing dissatisfaction with brands, practices, and industries. In an era in which all consumers can research claims at the click of a button, advertising and brands need to be more accountable than ever and this is a transition that is being made too slowly for some.

Governments and institutions behaving badly: This is nothing new, but the digital era has amplified voices of dissent and dissatisfaction in a way that has never been seen before. In the UK one might suggest this is the inevitable outcome of the end of the post-war consensus where the cohesive ideals of universality, the NHS, and free education have been undermined and led to a growing feeling of disunity

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Those with a higher level of education are more likely to trust media across all channels



of 'them and us' and of the establishment vs the people. And when you factor in the view that broadly speaking the traditional media is considered by some to be a part of the 'establishment', this then impacts on trust in it. Consider in Germany the AFD chants of 'Lügenpresse' (roughly translated as fake news) at the rallies in Chemnitz, Trump and his supporters roundly rejecting all virtually all established media as 'fake news', and both UKIP and the SNP attacking the BBC for bias in its reporting of both Brexit and the Scottish independence referendum.

Media behaving badly: Media giants themselves, of course, are not blameless. Though often operated as self-appointed 'moral guardians' – think the muckrakers of the early 20th century – in the last few years this aspect of their role has become subdued.



The competition for web traffic has spawned the creation of “clickbait”, or headlines that use controversial statements to obscure often benign stories. The sharing culture of social media means that, often, these links are reshared without actually being read.

Further, in an effort to keep up with the 24-hour news cycle, news outlets can often be spotted “getting it wrong”. For example, in December 2017, American news outlet ABC erroneously reported that Lt. Gen. Michael Flynn acted under Donald Trump’s instructions when contacting Russian officials during the campaign. This error caused volatility and panic on the stock markets and on the streets before ABC finally issued a correction.

More benign (and more common) mistakes include linking videos or photos of prior events to news stories, as was done by the New York Times in June 2017 when they posted a video of the 2011 shooting of Senator Gabrielle Gifford (D-AZ) alongside a story of the June 2017 shooting in Alexandria, VA. Because mistakes are now picked up and broadcast via social media very quickly the media, ironically, can afford for them to happen less.

What can be done?

The issue of trust is highly complex and exploring trust in media even more complicated. When national newspapers are increasingly consumed on social media platforms, where TV is increasingly viewed on demand and on a phone and when anyone can post a story and present it as fact, there is a blurring and merging of content, fact, and fiction. It is difficult to ask questions on the subject of trust in the media even before we attempt to explain and understand the answers. And it is clear that simple questions can only be of limited value – there is no easy question nor an easy answer when it comes to exploring the issue.

But what we hope we have achieved in this paper is to provide an overview of the state of trust in the media around the world. There is no global crisis of trust in the media, and indeed, we can also say that there is also no crisis of trust in the media in established ‘western’ markets.

Where there is a decline in trust, perceived or actual, we should view this as an opportunity for media conglomerates to renegotiate their own relationships with their audiences. People are consuming more media than ever, across more channels than ever before – their role in society has hardly diminished.

In a more immediate sense, media owners need to take greater responsibility for the content that is posted on their platforms or within their brands.

But it is crucial for them to be as transparent as possible to audiences in the way its business models and algorithms work – or badly placed YouTube adverts may soon be the least of our problems. Social media is having a profound impact on our culture, how we view others, and the world around us. We need to be more attentive to the precise nature of that impact and make efforts to ensure that the changing nature of the production and dissemination of news, and content as a whole, doesn’t in the longer term undermine relationships and trust in one another, let alone the media.

To borrow a phrase from economic sociologist Ronald Burt, “the question is not whether to trust, but whom to trust.” There is no way for us to guarantee the actions of others, but at the same time, it is also impossible for us to operate completely independently, making trust a necessary basis for any interaction.

References

¹ <https://www.edelman.com/trust-barometer>

² *Standard Eurobarometer 88 Autumn 2017 Media Use in the European Union*

³ *Pan-BBC Tracking Study Kantar Media*

⁴ <https://www.ipsos.com/ipsos-mori/en-uk/veracity-index-2018-advertising-executives-rank-below-politicians-britains-least-trusted-profession>

⁵ <http://perils.ipsos.com/>

⁶ *Regression analysis is a technique used to understand the relationship between variables and the importance of these variables in driving an important outcome*

⁷ <https://www.newstatesman.com/politics/uk/2018/08/how-britain-political-conversation-turned-toxic>

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