

The background of the entire page is a photograph of a large crowd of people at what appears to be a concert or public event. Many hands are raised in the air, some with watches visible. The image is divided into vertical panels, and there are large, semi-transparent circular overlays. The EBU logo is in the top left corner.

**EBU**

OPERATING EUROVISION AND EURORADIO

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# DEMOCRACY & PSM

HOW A NATION'S DEMOCRATIC HEALTH RELATES TO THE  
STRENGTH OF ITS PUBLIC SERVICE MEDIA

MEDIA INTELLIGENCE SERVICE  
SEPTEMBER 2019

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# ABOUT THIS REPORT

A free and independent media is the cornerstone for a healthy and thriving democracy. However, recent political upheavals across Europe, paired with increasing threats of misleading or disinformation – not only during elections – generates insecurity among citizens and has a negative impact on their levels of trust in media and institutions.

For many Europeans, public service media (PSM) are the place to go for trustworthy and reliable information. At the same time, the state of democracy and political stability is challenged in more and more markets. To what extent does a nation's democratic health relate to the strength of its public service media? And can this be supported by numbers?

Three years after the first [PSM Correlations](#) report, these questions still remain of highest importance. It is thus about time to reinforce the key arguments as to why PSM still matters and to demonstrate again how a well-funded and strong PSM contributes to the well-being of societies.

With increasing levels of societal polarization across Europe, it is essential to see the interplay of political and media institutions in a bigger context. The PSM Correlations project has thus evolved over the past years, and now focuses on the backbone of strong and prosperous societies: democracy.

The report draws on a number of internationally established and widely used political indicators to find links between countries' ranks on these indices and the status of their PSM organizations. The data demonstrate that there is a close relationship between a country's political well-being, and the performance of its PSM. The report aims to inspire EBU Members in crafting narratives and messages to advance the cause of PSM. Moreover, the cross-country analysis also allows for comparison across different national markets.

The research was done using data mostly from 2018 and 2019, and in some cases from earlier years, due to availability issues. Apart from the EBU-MIS in-house data collected via the annual Media Intelligence Survey, a number of external data sources were used, listed on the following pages together with their publishers.

# KEY FINDINGS

## STRONG AND WELL-FUNDED PSM

### CHARACTERIZED BY...

- High PSM TV market shares
- High PSM radio market shares
- High PSM funding per capita
- Perceived political independence of PSM



## GO HAND IN HAND WITH



## A NATION'S DEMOCRATIC HEALTH

### CHARACTERIZED BY...

- Higher democratic standards
- More political participation
- More political stability
- Higher control of corruption
- More satisfaction with democracy
- More press freedom





# **METHODOLOGY & DEFINITIONS**



# CONCEPT & METHODOLOGY

## CHOOSING RELEVANT INDICATORS

To demonstrate a relationship between PSM and democracy, the following indicators for both areas were identified:

### PSM

- PSM TV market share
- PSM radio market share
- PSM funding per capita
- Perceived political pressure on PSM

### DEMOCRACY

- Democracy Index
- Political participation
- Political stability
- Control of corruption
- Satisfaction with democracy
- Press freedom

A description of the indicators and their sources can be found on [page 7](#).

## REGIONAL INDEX

The Regional Index represents an aggregate (=sum) of the correlated indicators by geographical region, normalized to a scale from 0 – 1. This ranking allows for comparisons between regions, with higher values implying higher performances on both dimensions.

## TESTING CORRELATIONS

After compiling datasets, correlation analysis tests were run with Excel's Data Analysis tool, to determine the strength of the correlation and its level of significance.

### Pearson Correlation Coefficient (r)

- A measure of the linear correlation between two variables
- Gives a value between +1 and -1: A coefficient of +1 indicates a perfect positive correlation, 0 indicates no correlation at all, -1 a perfect negative correlation
- Moderate correlation: 0.4 to 0.6 or -0.4 to -0.6
- Strong correlation: 0.6 to 1 or -0.6 to -1

### Level of significance (p-value)

- Is the correlation statistically significant or is it only by chance?
- If p-value < 0.05 the correlation is statistically significant: increases or decreases in one variable significantly relate to increases or decreases in the second variable
- All correlations shown in this report are statistically significant with p-values < 0.05

## CORRELATION ≠ CAUSATION

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

# INDICATORS & SOURCES

## PSM INDICATORS

---

### **EBU Members' data by EBU's Media Intelligence Service (MIS)**

Data collected among EBU Members via the annual Media Intelligence Survey, providing in-depth information about the performance of PSM across Europe. Indicators used in this report:

[PSM market shares for TV](#)

[PSM market shares for radio](#)

[PSM funding per capita.](#)

### **Perceived political pressure on PSM by Eurobarometer 90 (European Commission)**

A public opinion survey covering 33 European countries. It gives an idea of citizens' perception on a variety of topics. This indicator is based on agreement with the statement: *National public service media are free from political pressure.*

[http://data.europa.eu/88u/dataset/S2215\\_90\\_3\\_STD90\\_ENG](http://data.europa.eu/88u/dataset/S2215_90_3_STD90_ENG)

## DEMOCRACY INDICATORS

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### **Democracy Index and Political Participation by The Economist**

A ranking of 165 countries regarding their state of democracy on a scale of 0-10. The Index is based on a combination of expert assessments and public-opinion surveys. One dimension of the Index is political participation, which rates the level of citizens' engagement in political affairs (voter turn-out, party memberships, participation in demonstrations, etc.).

<https://www.eiu.com/topic/democracy-index>

### **Political Stability and Control of Corruption by the Worldbank**

Two dimensions, which are part of the Worldwide Governance Indicators (WGI), evaluating the state of governance in more than 200 countries. Political Stability and Absence of Violence/Terrorism measures perceptions of the likelihood of political instability and/or politically-motivated violence, including terrorism. Control of Corruption captures perceptions of the extent to which public power is exercised for private gain, including both petty and grand forms of corruption.

<http://info.worldbank.org/governance/wgi/index.aspx#home>

### **Freedom of the Press Index by Reporters without Borders**

An annual ranking of 180 countries regarding the freedom available to journalists, based on a questionnaire among experts. The Index ranges from 1-100: the higher the score, the less press freedom. For this report, the index was inverted in order to match higher scores to higher press freedom levels.

<https://rsf.org/en/ranking>

### **Satisfaction with democracy by Eurobarometer 90 (European Commission)**

A public opinion survey covering 33 European countries. It gives an idea of citizens' perception on a variety of topics. This indicator is based on the question: *On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in your country?*

[http://data.europa.eu/88u/dataset/S2215\\_90\\_3\\_STD90\\_ENG](http://data.europa.eu/88u/dataset/S2215_90_3_STD90_ENG)

# COUNTRY CODES AND GEOGRAPHICAL REGIONS

## BIG 5

France	FR
Germany	DE
Italy	IT
Spain	ES
United Kingdom	GB

## NORDICS

Denmark	DK
Finland	FI
Iceland	IS
Norway	NO
Sweden	SE

## CEE

Armenia	AM
Belarus	BY
Bosnia-Herzegovina	BA
Bulgaria	BG
Croatia	HR
Czech Republic	CZ

Estonia	EE
Georgia	GE
Hungary	HU
Latvia	LV
Lithuania	LT
North Macedonia	MK
Moldova	MD
Poland	PL
Romania	RO
Russian Federation	RU
Serbia	RS
Slovakia	SK
Slovenia	SI
Ukraine	UA

## REST OF EU + CH

Austria	AT
Belgium	BE
Belgium (Flemish)	BE (FL)
Belgium (French)	BE (FR)
Cyprus	CY

Greece	GR
Ireland	IE
Luxembourg	LU
Malta	MT
Netherlands	NL
Portugal	PT
Switzerland	CH
Switzerland (French)	CH (FR)
Switzerland (German)	CH (DE)
Switzerland (Italian)	CH (IT)

## MENA

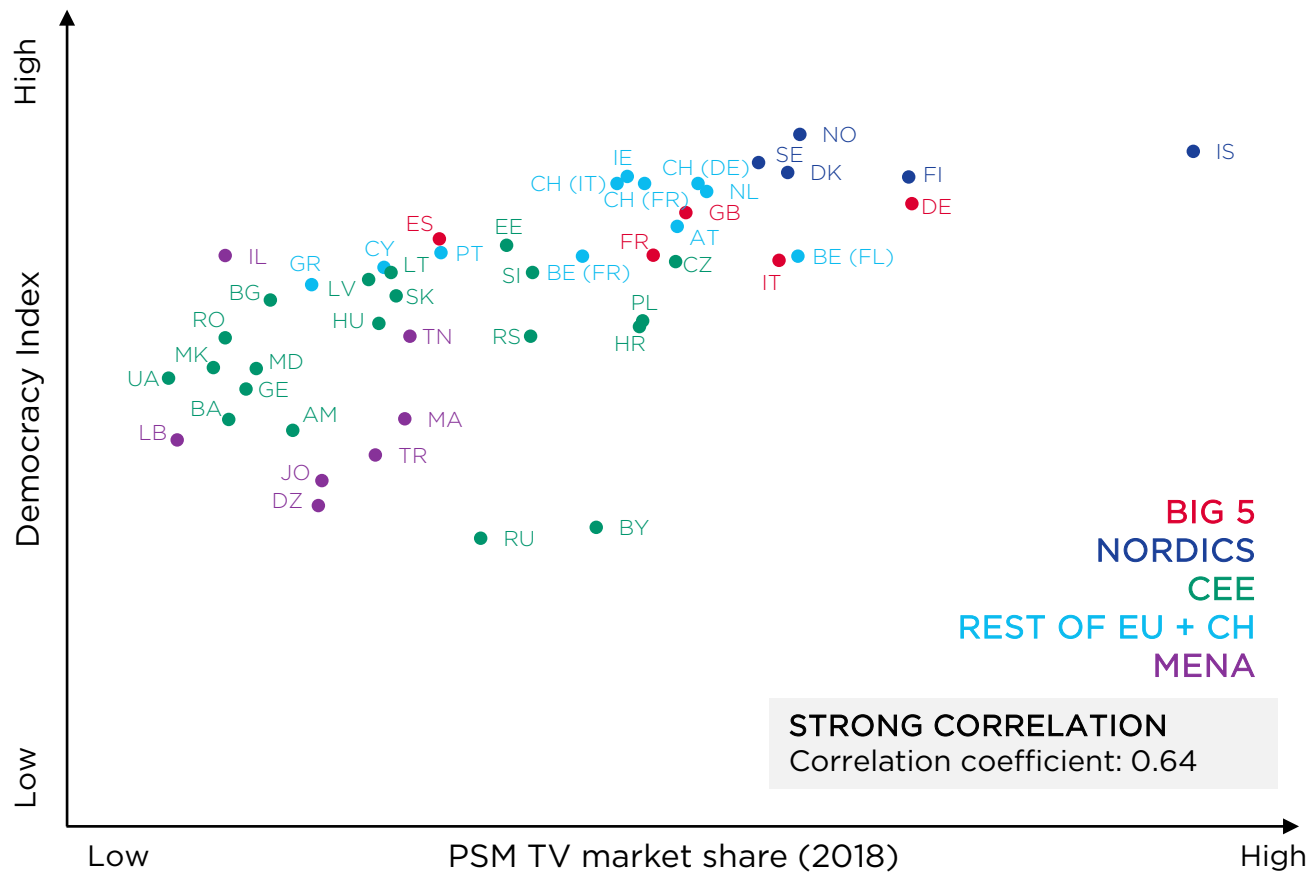
Algeria	DZ
Israel	IL
Jordan	JO
Lebanon	LB
Morocco	MA
Tunisia	TN
Turkey	TR



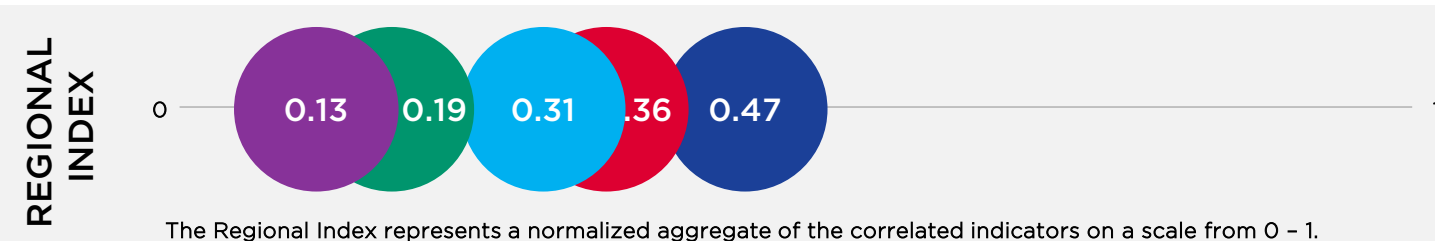
# STATE OF DEMOCRACY

Countries with high PSM TV and radio market shares and high PSM funding per capita tend to rank higher in the democracy index. Similarly, lower PSM market shares or less funding per capita means a lower level of democracy in a country. This relationship implies that a strong and well-funded PSM is a sign of healthy democratic societies.

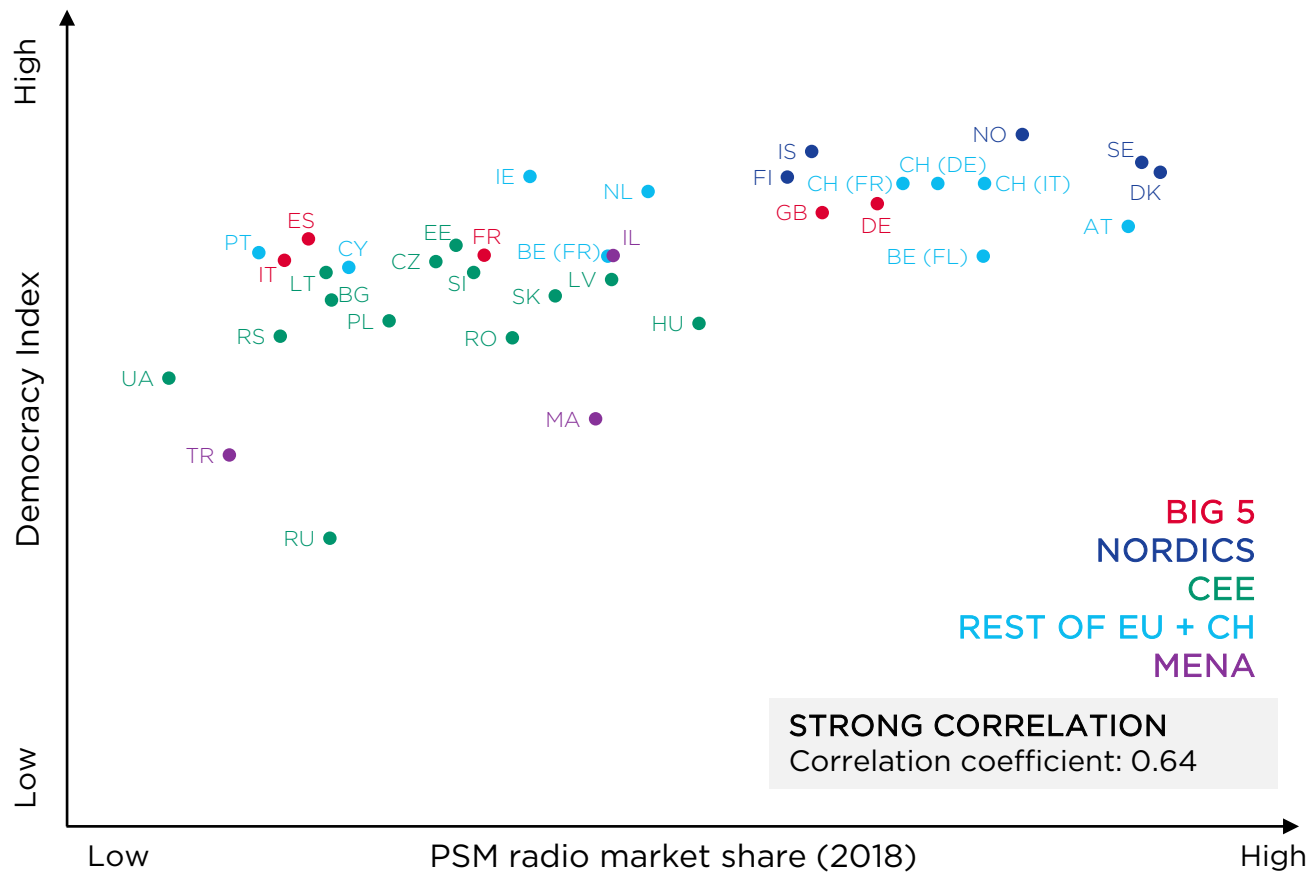
# PSM TV MARKET SHARE vs. DEMOCRACY INDEX



**PUBLIC TV  
TENDS TO BE  
MOST WATCHED  
IN COUNTRIES  
WITH A STRONG  
DEMOCRACY**



# PSM RADIO MARKET SHARE vs. DEMOCRACY INDEX



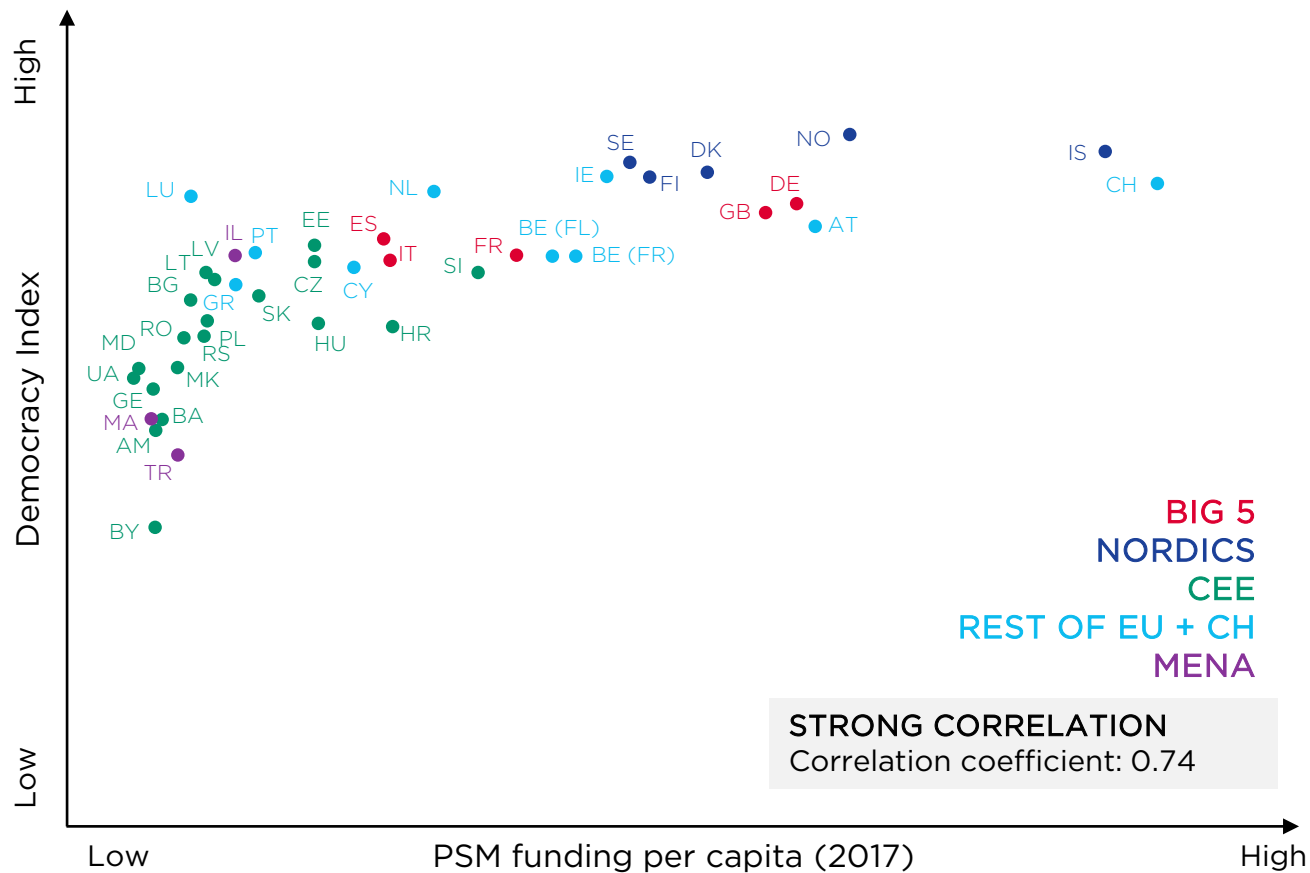
**STRONG  
DEMOCRACIES  
TEND TO HAVE  
HIGHER PUBLIC  
RADIO SHARES**

REGIONAL  
INDEX

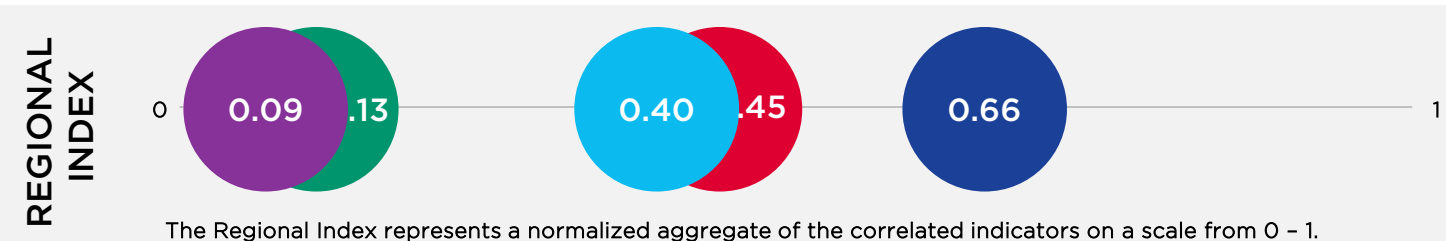


The Regional Index represents a normalized aggregate of the correlated indicators on a scale from 0 – 1.

# PSM FUNDING PER CAPITA vs. DEMOCRACY INDEX



**STRONG  
DEMOCRACIES  
TEND TO  
INVEST MORE  
IN THEIR  
NATIONAL PSM**



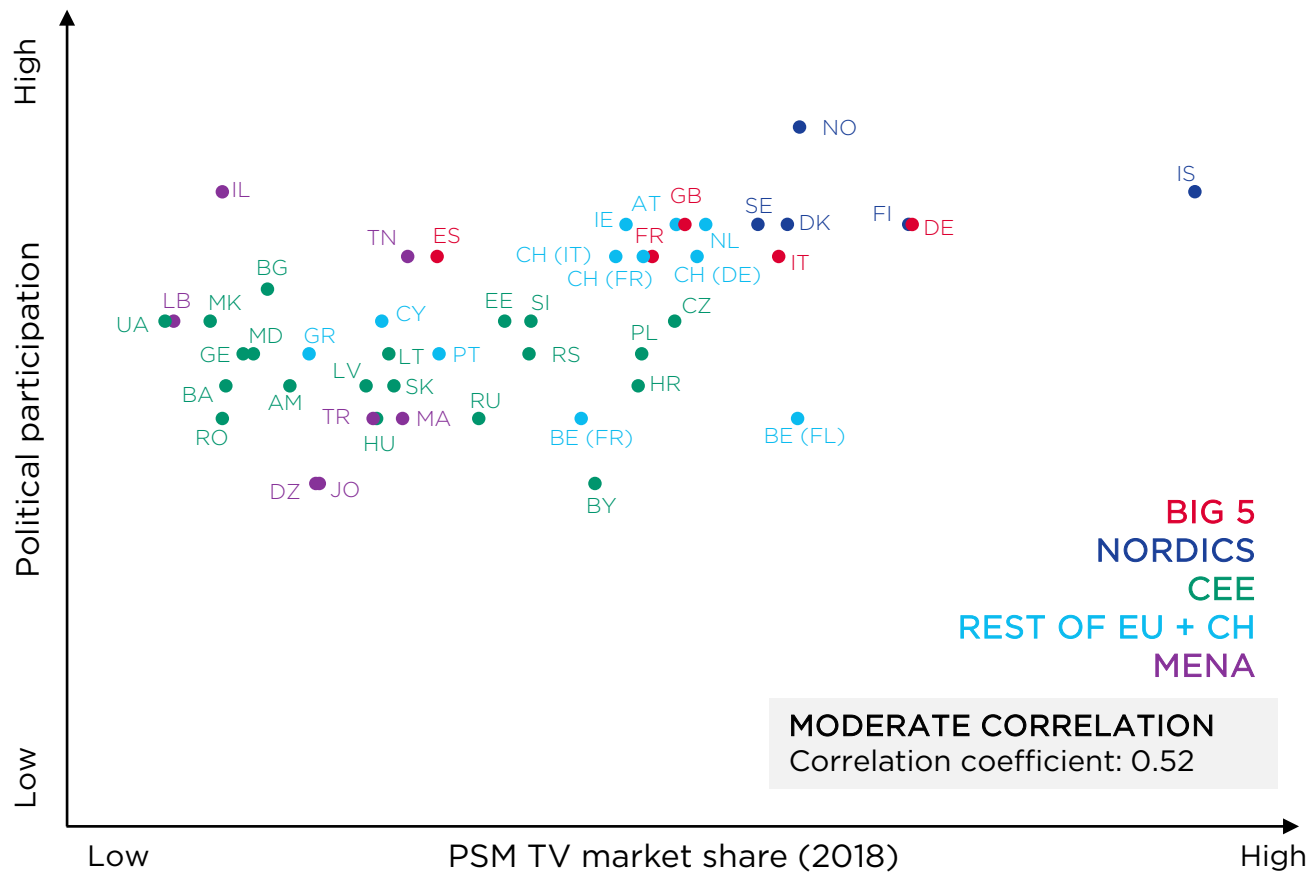


# POLITICAL PARTICIPATION

In countries with high PSM TV and radio market shares and high PSM funding per capita, political participation tends to be higher. A moderate correlation between these indicators implies that there is a link between citizens' democratic participation and the strength of the national PSM, but that there are also other factors influencing this relationship.



## PSM TV MARKET SHARE vs. POLITICAL PARTICIPATION



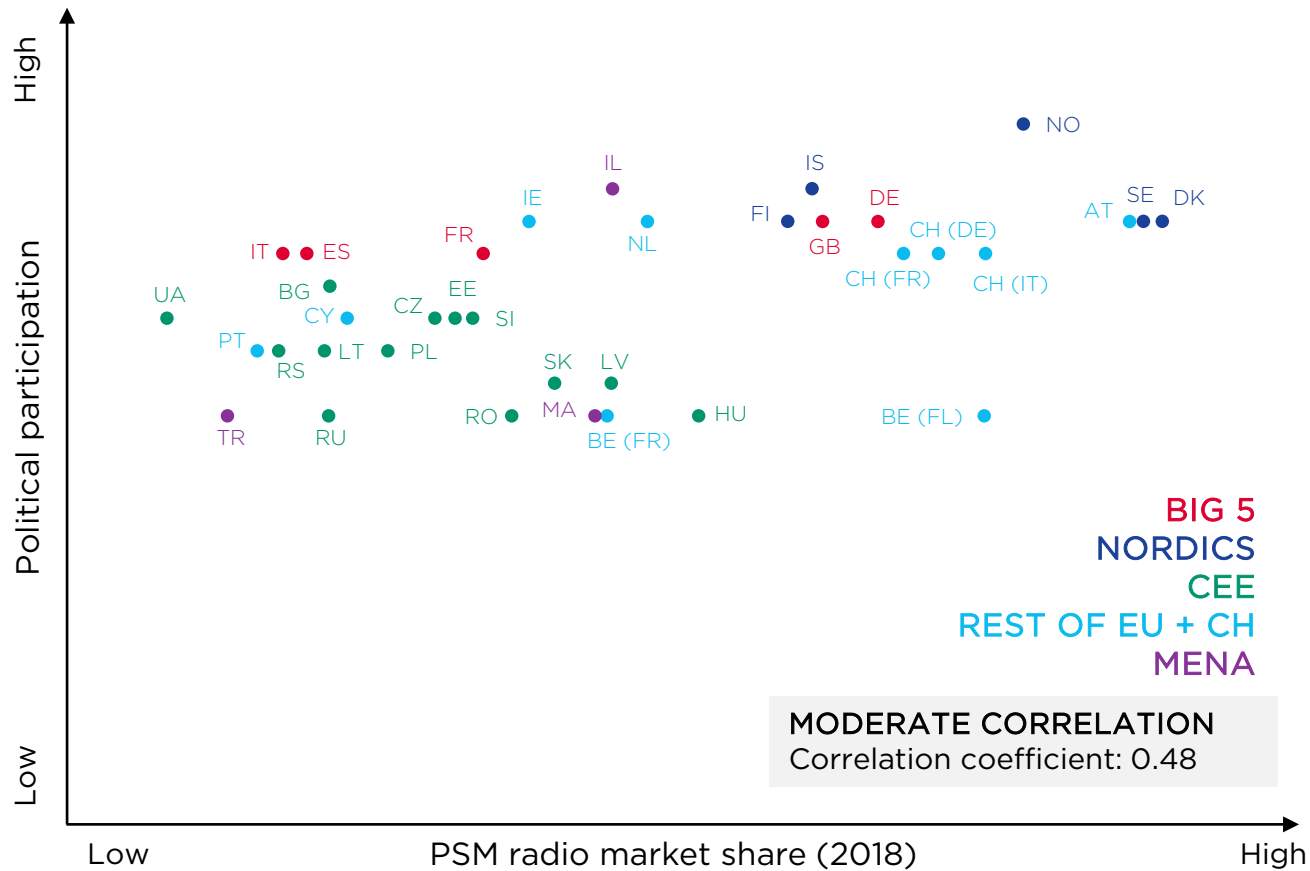
**A NATION'S  
STRONG PUBLIC  
TV TENDS TO  
INDICATE MORE  
POLITICAL  
PARTICIPATION**

REGIONAL  
INDEX



The Regional Index represents a normalized aggregate of the correlated indicators on a scale from 0 - 1.

## PSM RADIO MARKET SHARE vs. POLITICAL PARTICIPATION



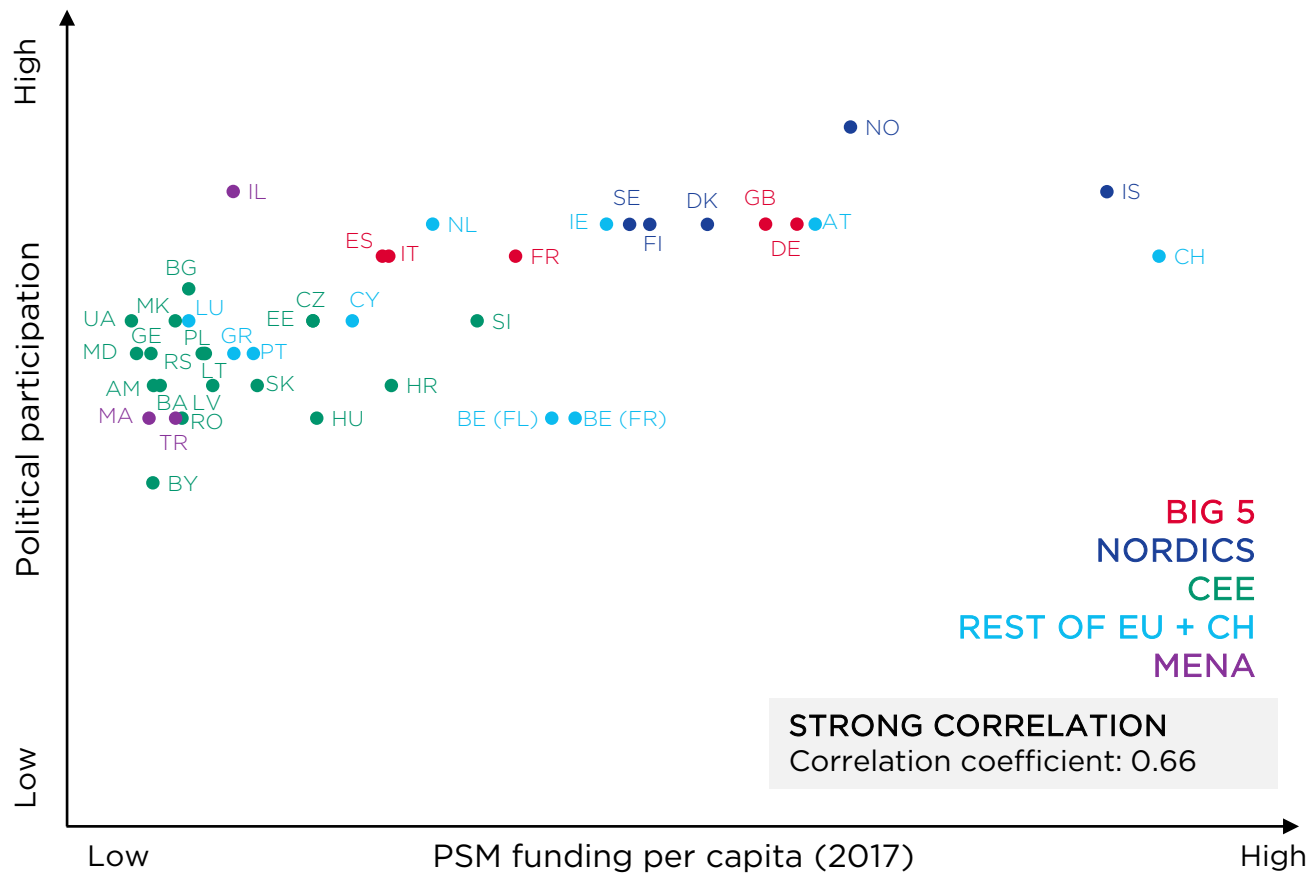
THE BIGGER A  
NATION'S  
PUBLIC RADIO  
AUDIENCE,  
THE HIGHER  
THE POLITICAL  
PARTICIPATION

REGIONAL  
INDEX

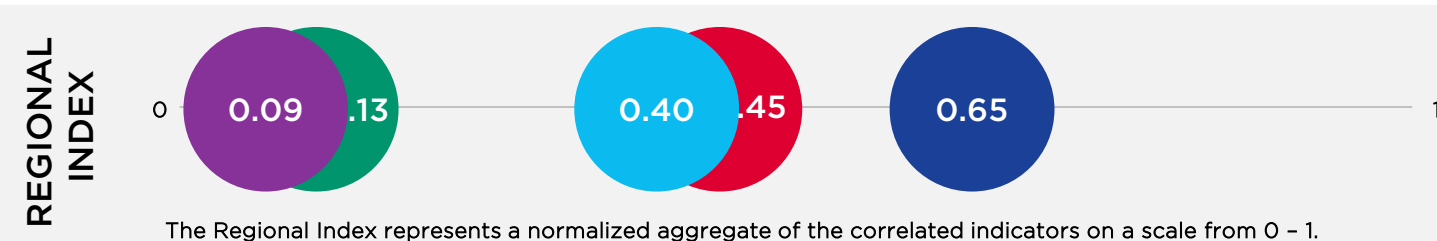


The Regional Index represents a normalized aggregate of the correlated indicators on a scale from 0 - 1.

# PSM FUNDING PER CAPITA vs. POLITICAL PARTICIPATION



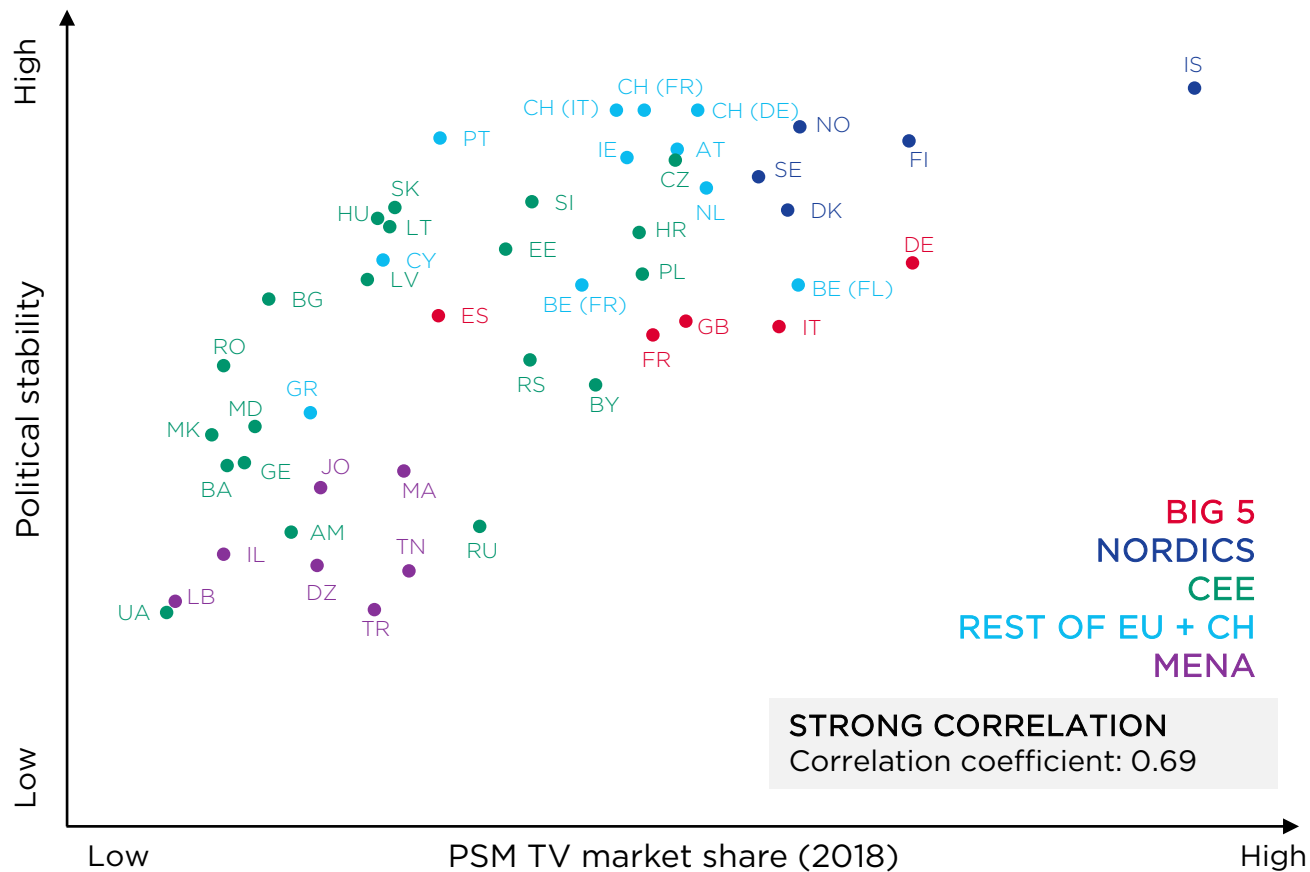
**A WELL-FUNDED PSM GOES TOGETHER WITH HIGH POLITICAL PARTICIPATION**



# POLITICAL STABILITY

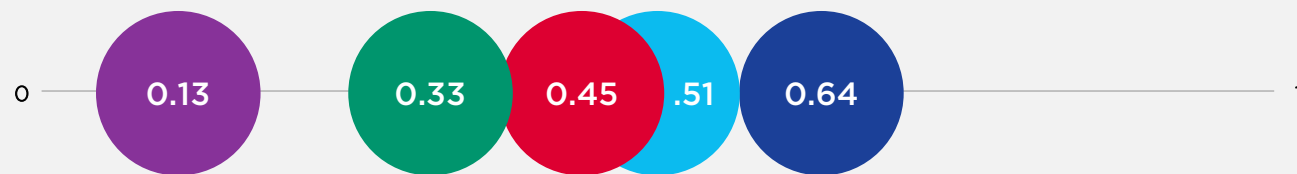
Higher PSM TV and radio market shares and higher PSM funding per capita go together with higher political stability and an absence of violence in a country. As political stability forms the basis for a healthy democratic system, a strong and well-established PSM indicates an important precondition.

## PSM TV MARKET SHARE vs. POLITICAL STABILITY



**POLITICAL  
STABILITY IS  
HIGHER IN  
COUNTRIES  
THAT WATCH  
MORE PUBLIC  
TV**

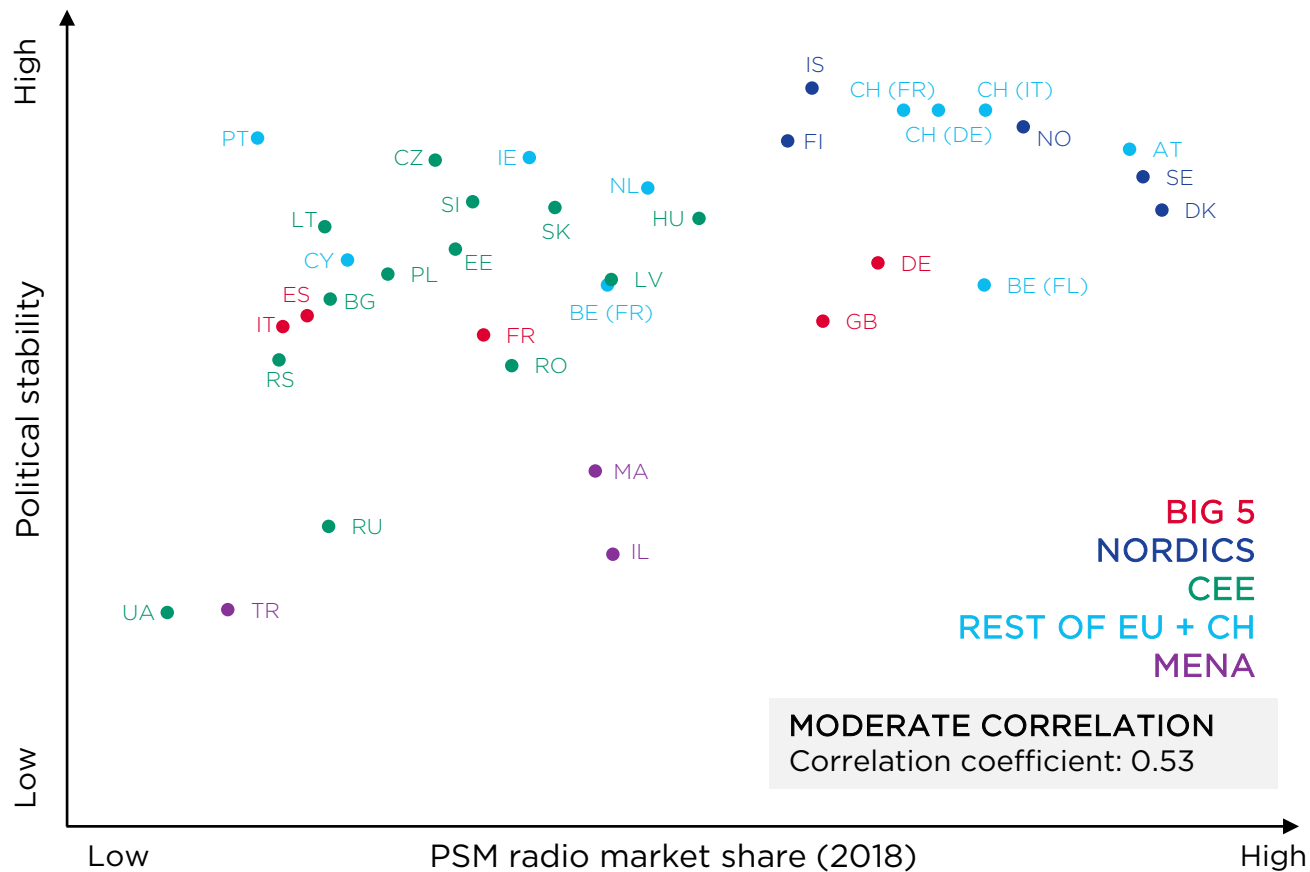
REGIONAL  
INDEX



The Regional Index represents a normalized aggregate of the correlated indicators on a scale from 0 - 1.

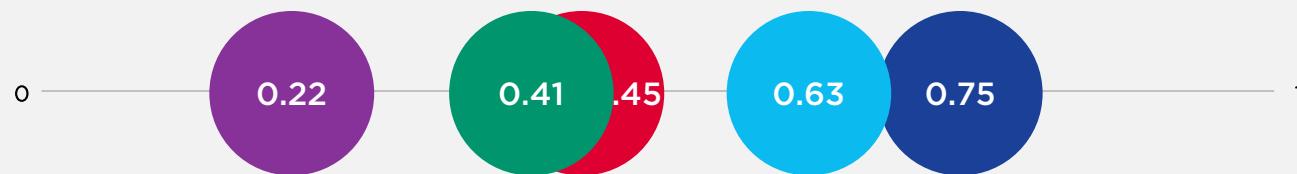


# PSM RADIO MARKET SHARE vs. POLITICAL STABILITY



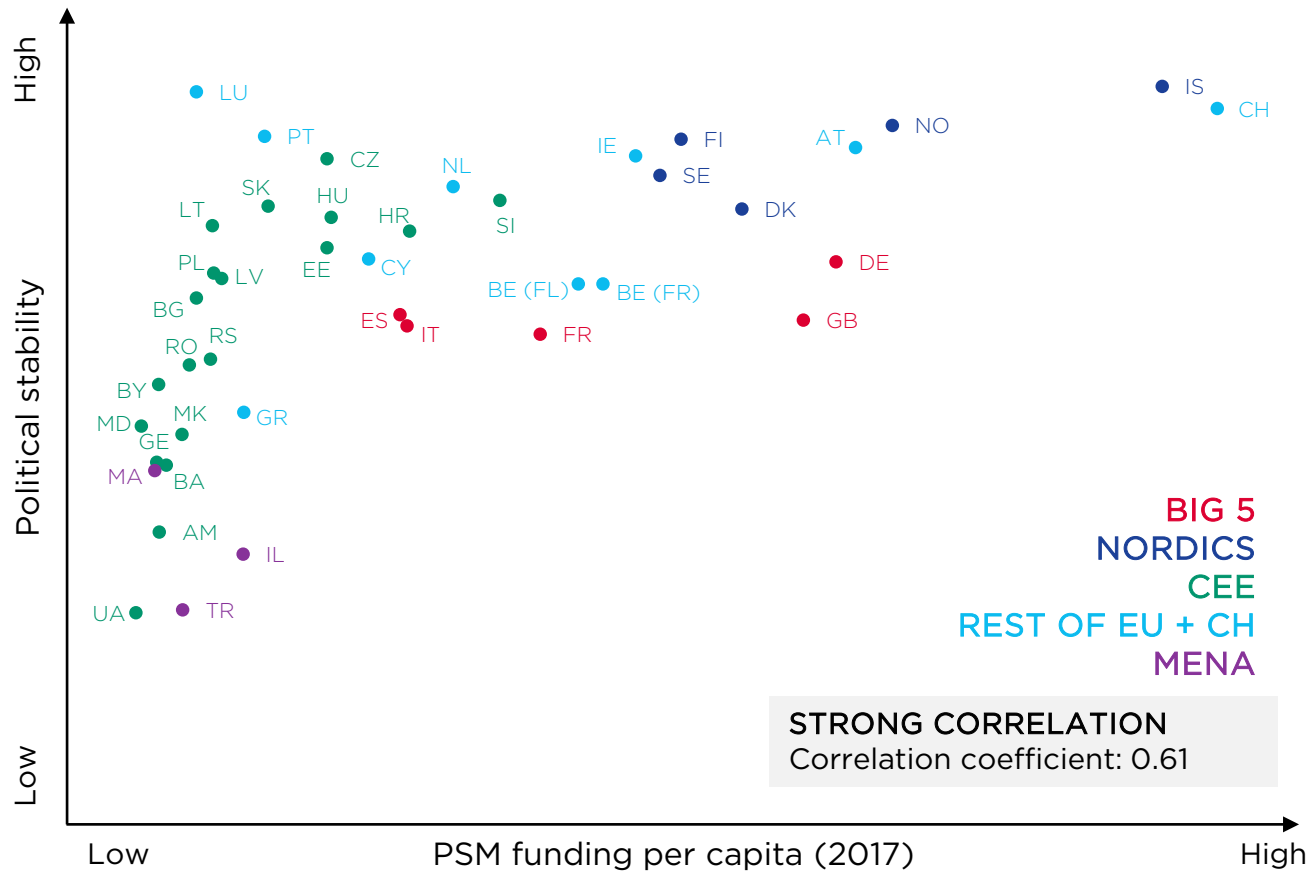
**A NATION'S  
STRONG PUBLIC  
RADIO TENDS  
TO INDICATE  
POLITICAL  
STABILITY**

REGIONAL  
INDEX



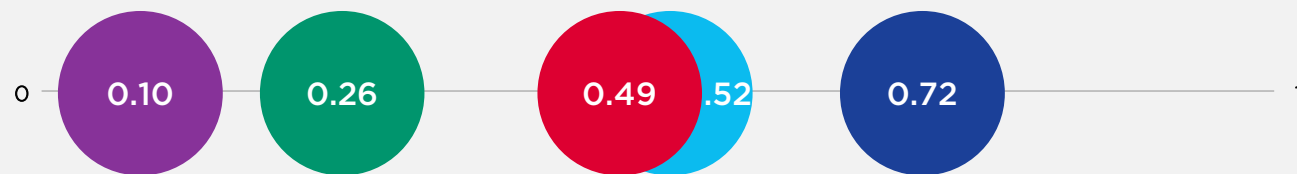
The Regional Index represents a normalized aggregate of the correlated indicators on a scale from 0 - 1.

## PSM FUNDING PER CAPITA vs. POLITICAL STABILITY



**COUNTRIES  
THAT INVEST  
MORE IN THEIR  
NATIONAL PSM  
ARE  
POLITICALLY  
MORE STABLE**

REGIONAL  
INDEX

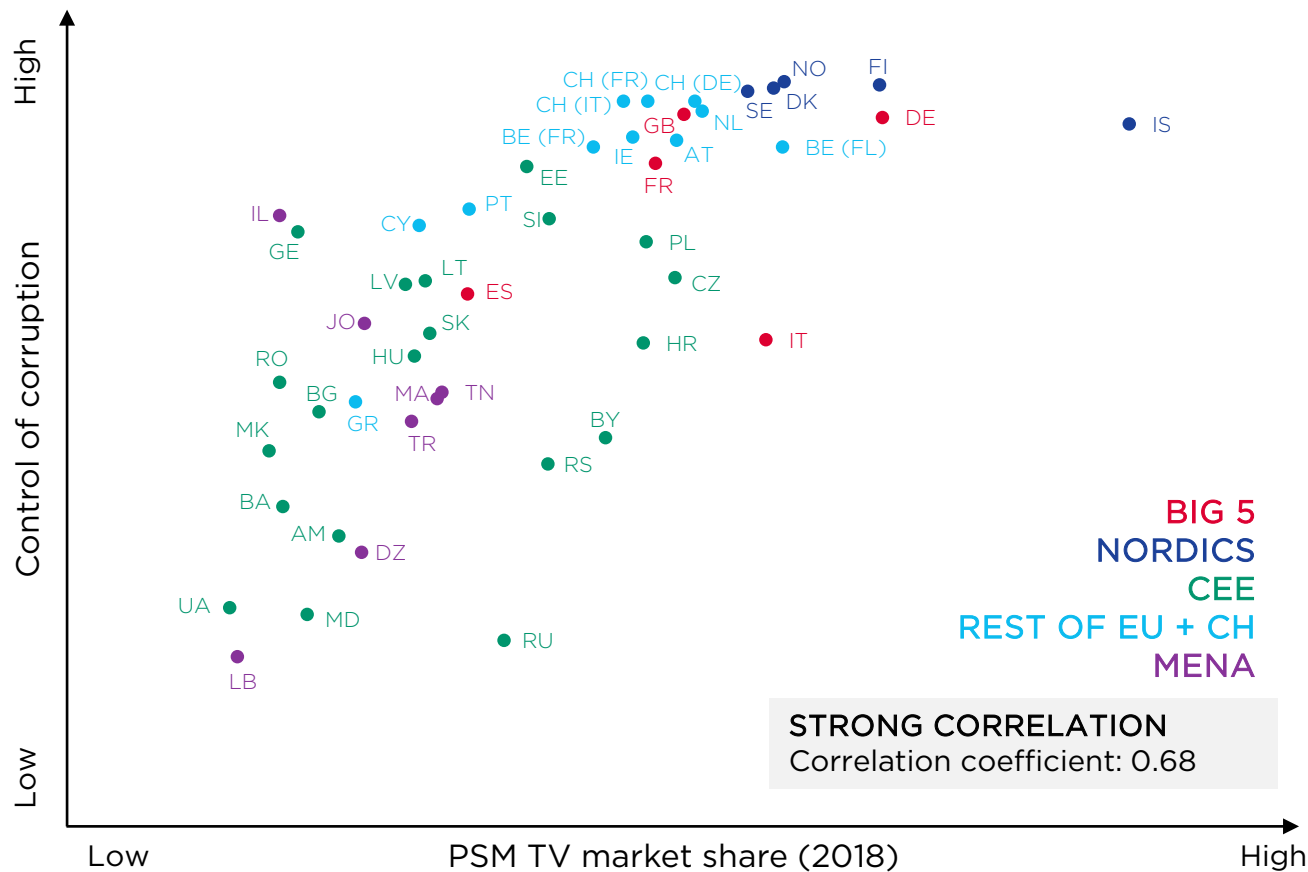


The Regional Index represents a normalized aggregate of the correlated indicators on a scale from 0 - 1.

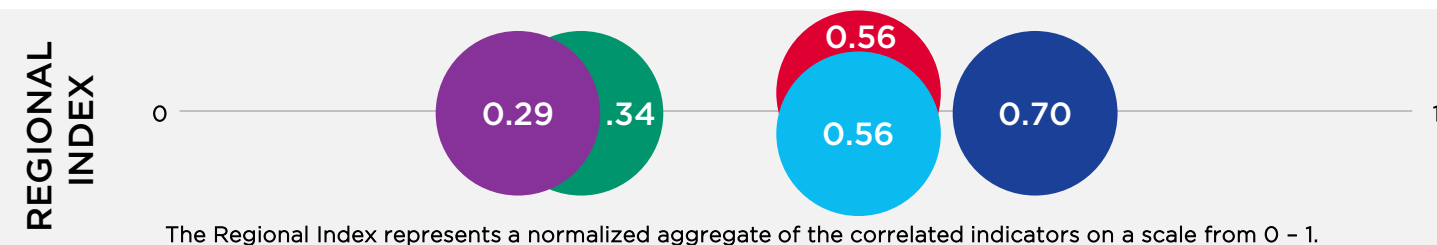
# CONTROL OF CORRUPTION

In countries with high PSM TV and radio market shares and high PSM funding per capita there is a higher control of corruption. A strong positive correlation with all three indicators implies that a cherished PSM is more prevalent in fair and well-governed democratic societies.

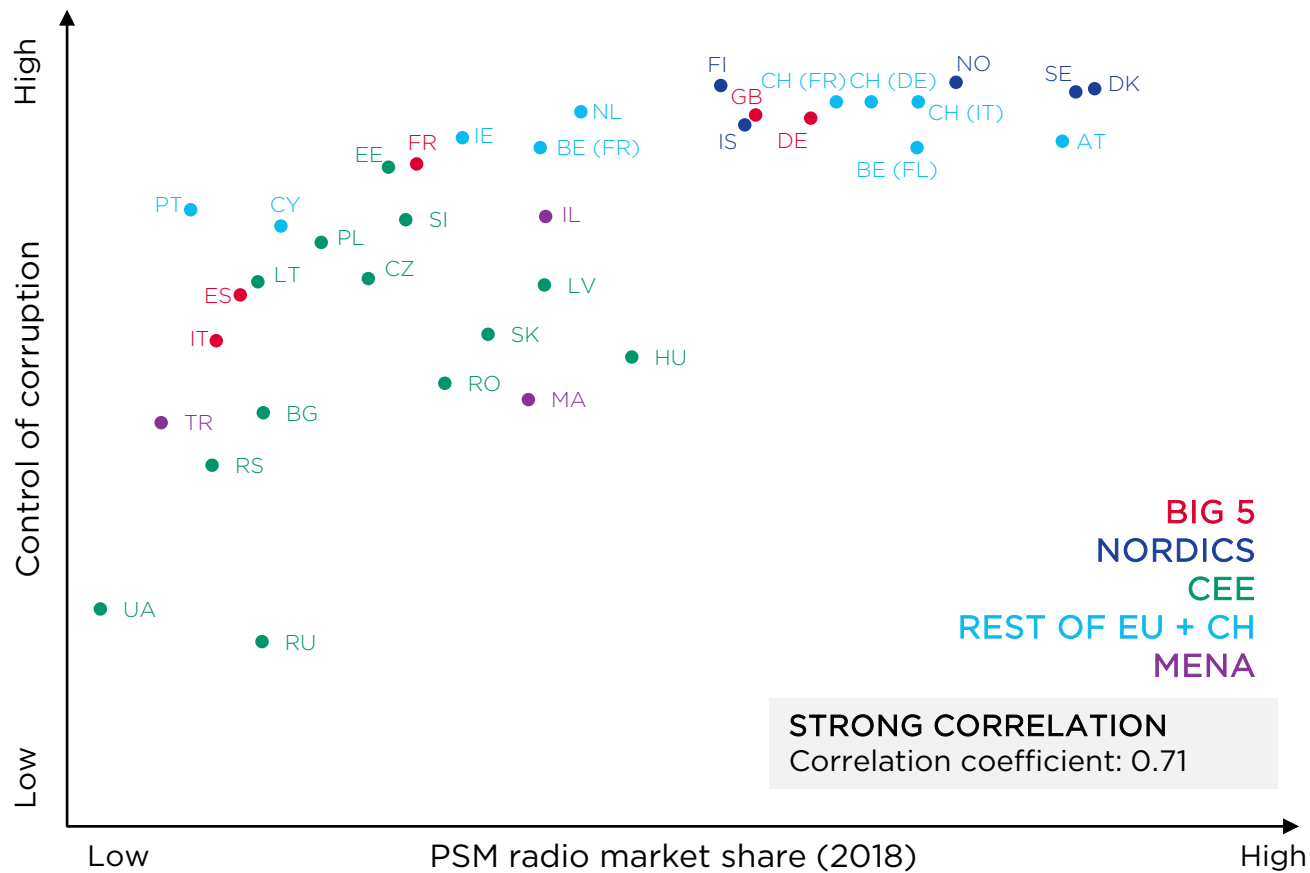
# PSM TV MARKET SHARE vs. CONTROL OF CORRUPTION



**COUNTRIES  
WITH HIGHER  
PSM TV MARKET  
SHARES TEND  
TO BE LESS  
CORRUPT**

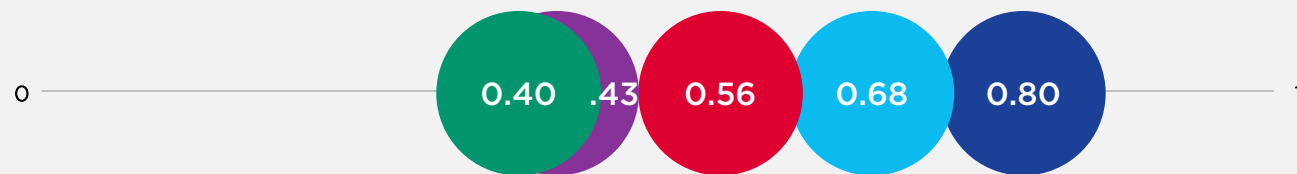


## PSM RADIO MARKET SHARE vs. CONTROL OF CORRUPTION



HIGHER PSM  
RADIO  
AUDIENCES  
INDICATE A  
HIGHER  
CONTROL OF  
CORRUPTION

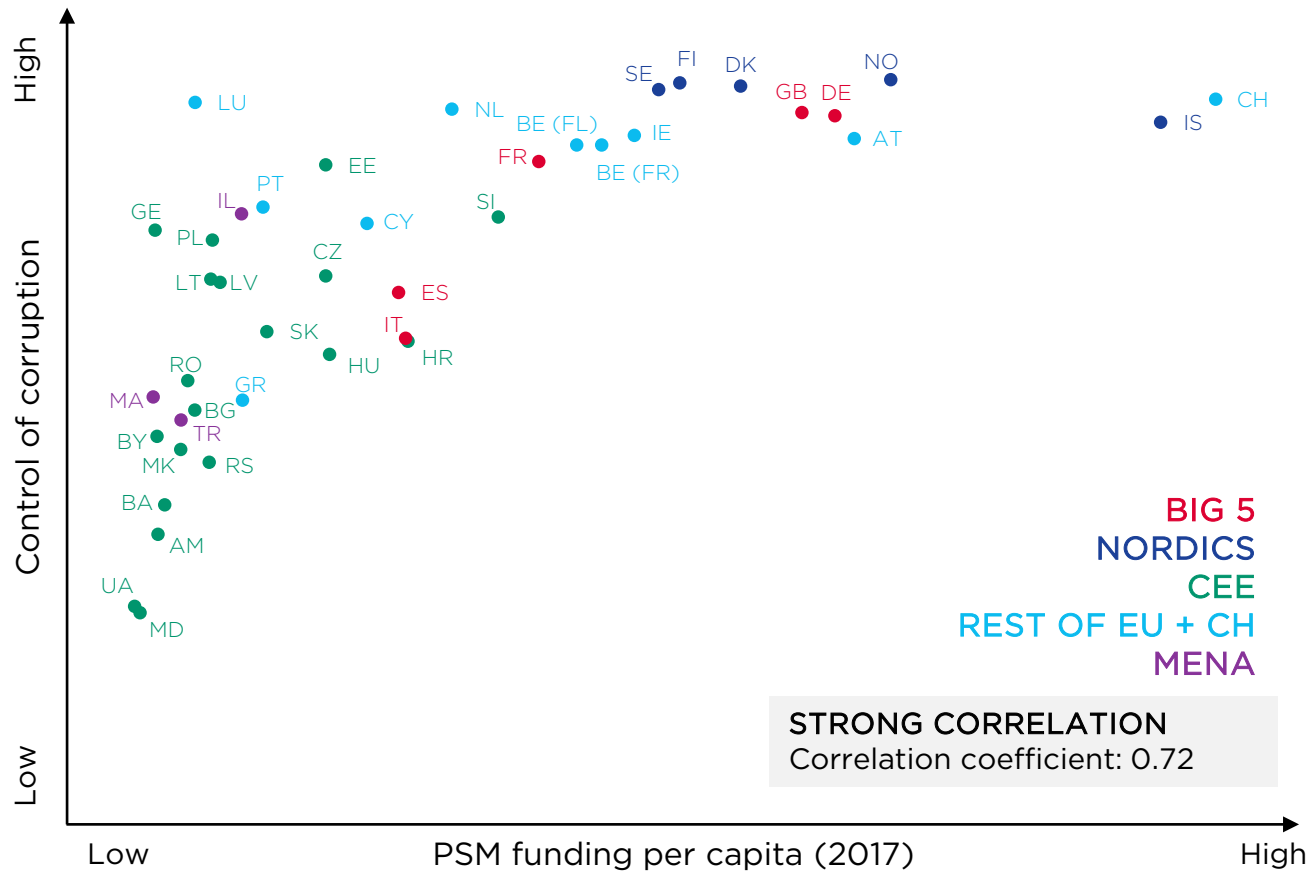
REGIONAL  
INDEX



The Regional Index represents a normalized aggregate of the correlated indicators on a scale from 0 - 1.



## PSM FUNDING PER CAPITA vs. CONTROL OF CORRUPTION



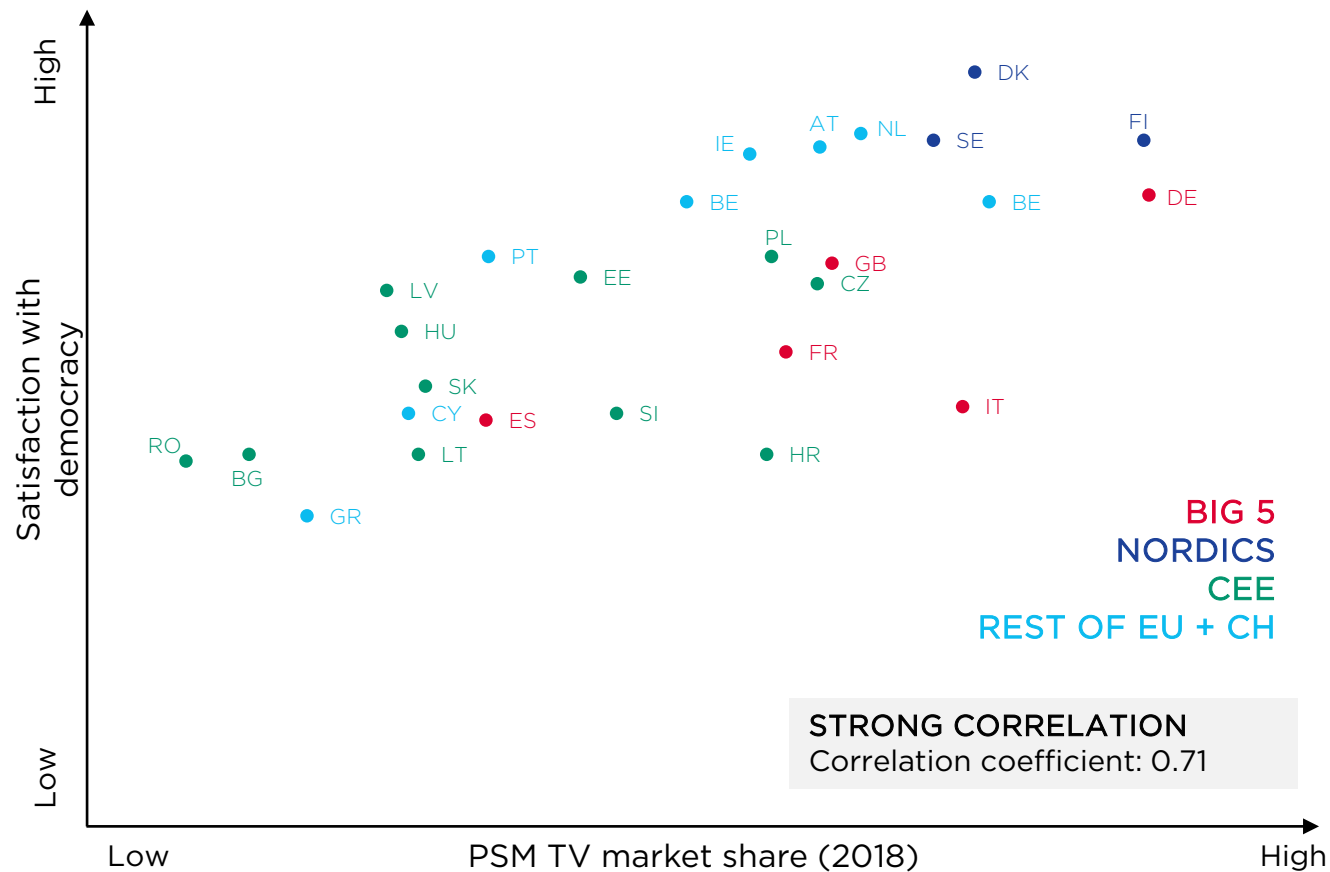
**COUNTRIES  
WITH A  
WELL-FUNDED  
PSM TEND TO  
HAVE LOWER  
RISKS OF  
CORRUPTION**



# SATISFACTION WITH DEMOCRACY

In countries with higher PSM TV and radio market shares, higher PSM funding per capita and a perceived political independence of PSM, citizens' satisfaction with democracy is higher. A strong position of a nation's PSM is thus closely linked to its citizens' state of well-being.

## PSM TV MARKET SHARE vs. SATISFACTION WITH DEMOCRACY



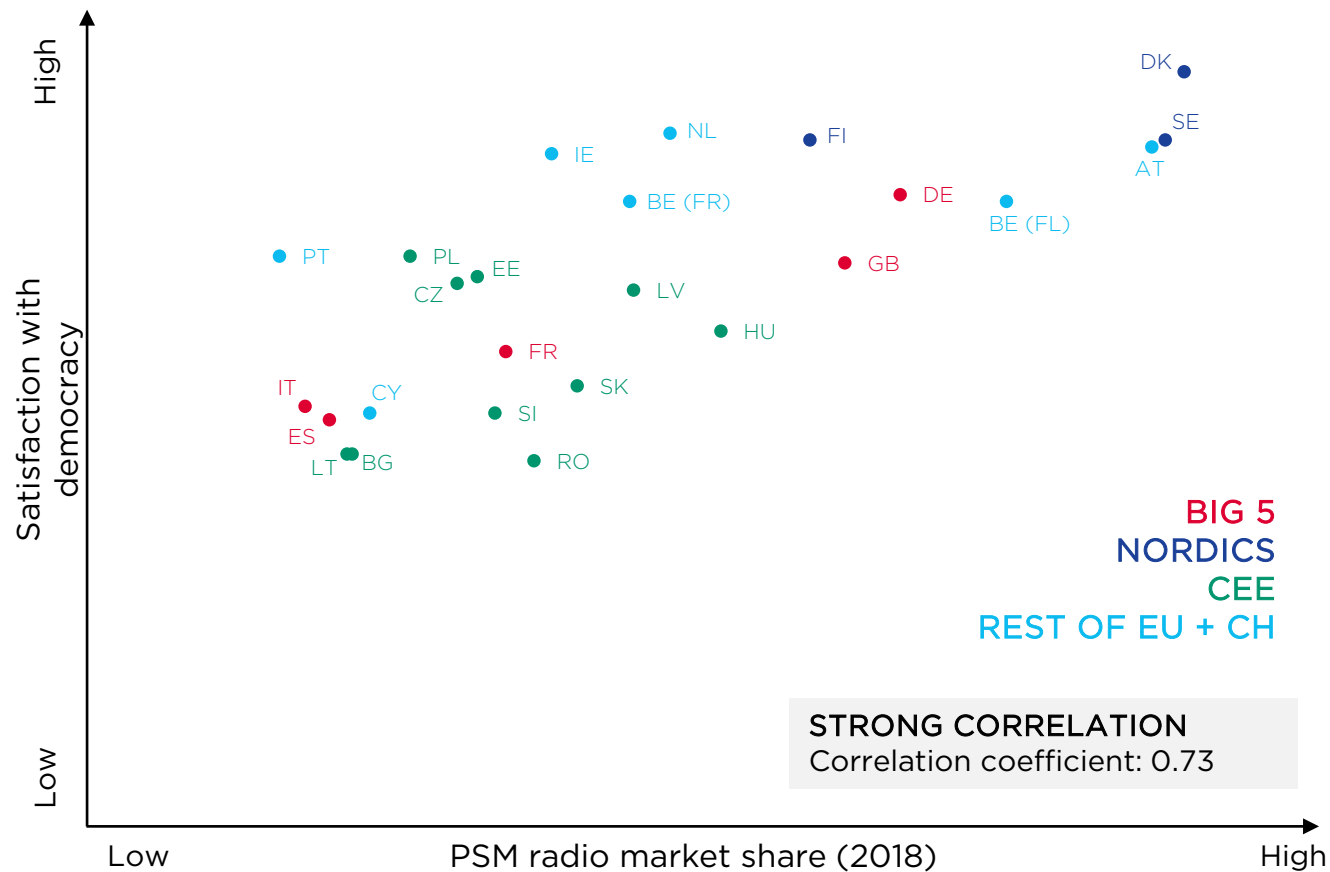
**SATISFACTION  
WITH  
DEMOCRACY  
TENDS TO BE  
HIGHER IN  
COUNTRIES  
WITH STRONG  
PUBLIC TV**

REGIONAL  
INDEX

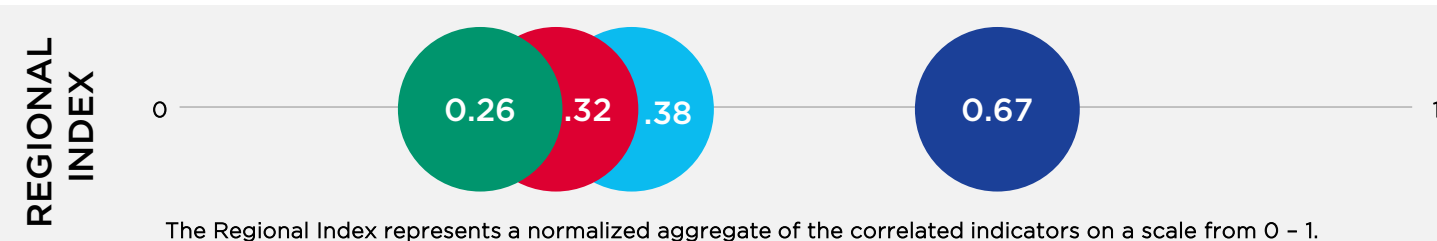


The Regional Index represents a normalized aggregate of the correlated indicators on a scale from 0 - 1.

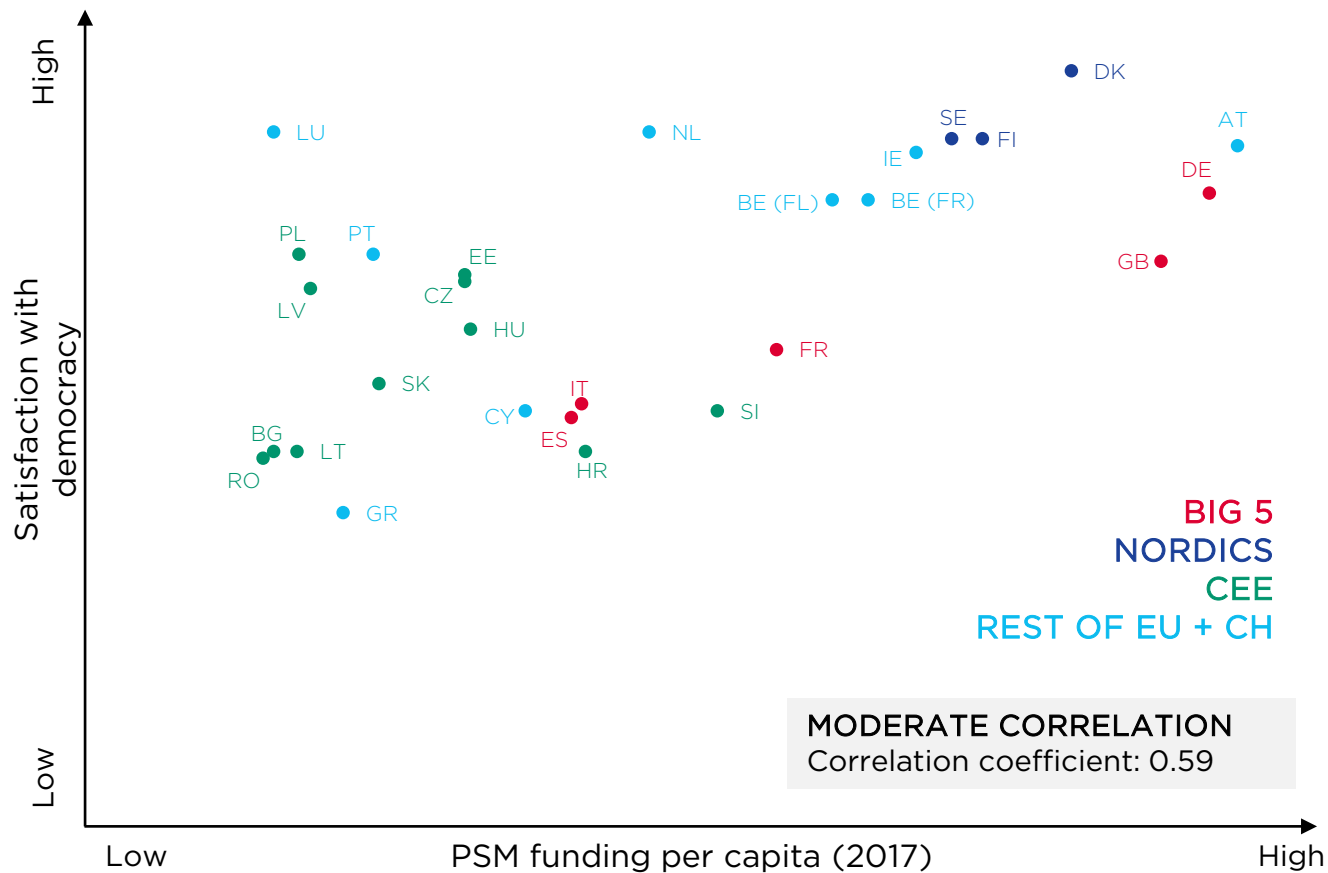
## PSM RADIO MARKET SHARE vs. SATISFACTION WITH DEMOCRACY



**HIGHER PSM  
RADIO SHARES  
TEND TO  
INDICATE MORE  
SATISFACTION  
WITH  
DEMOCRACY**

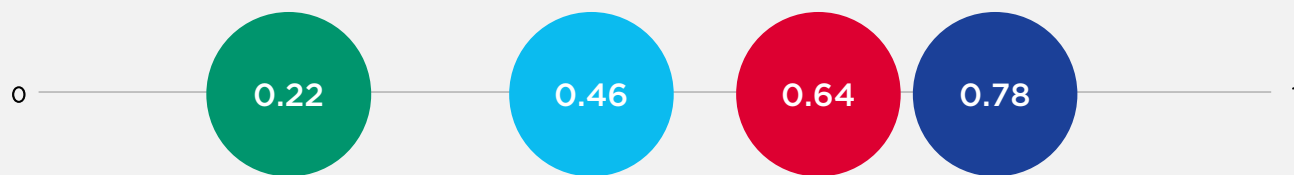


## PSM FUNDING PER CAPITA vs. SATISFACTION WITH DEMOCRACY



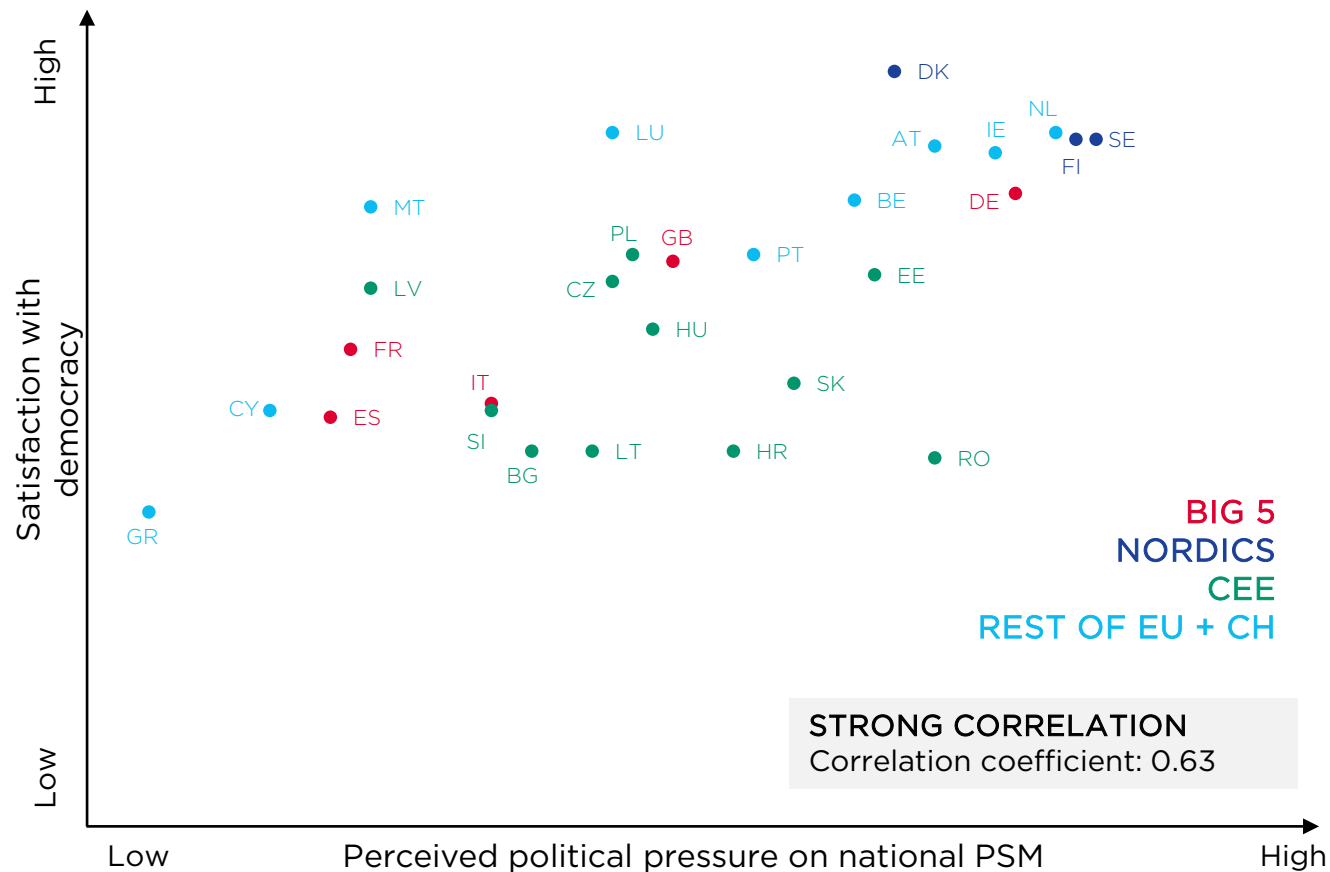
**A COUNTRY'S  
WELL-FUNDED  
PSM TENDS TO  
GO HAND IN  
HAND WITH  
CITIZENS'  
SATISFACTION  
WITH  
DEMOCRACY**

REGIONAL  
INDICATOR



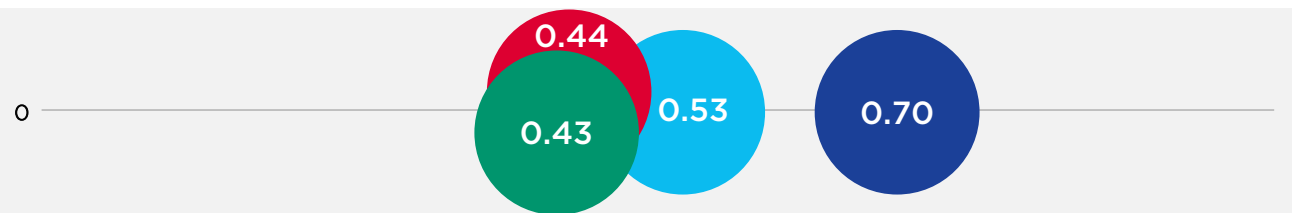
The Regional Index represents a normalized aggregate of the correlated indicators on a scale from 0 - 1.

## PERCEIVED POLITICAL PRESSURE ON PSM vs. SATISFACTION WITH DEMOCRACY



**CITIZENS WHO  
ARE SATISFIED  
WITH THEIR  
DEMOCRACIES  
ALSO PERCEIVE  
THEIR  
NATIONAL PSM  
TO BE MORE  
INDEPENDENT**

REGIONAL  
INDEX



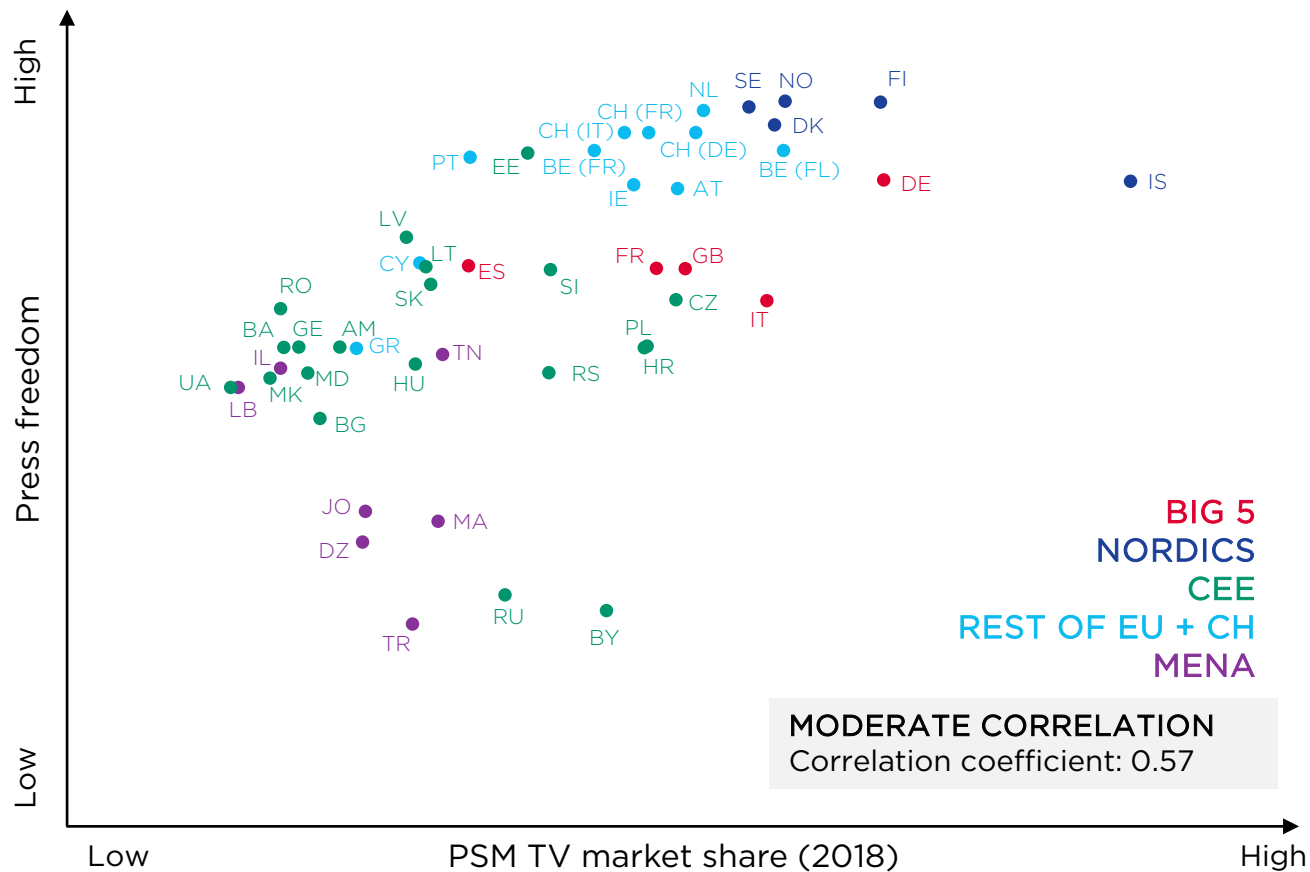
The Regional Index represents a normalized aggregate of the correlated indicators on a scale from 0 - 1.



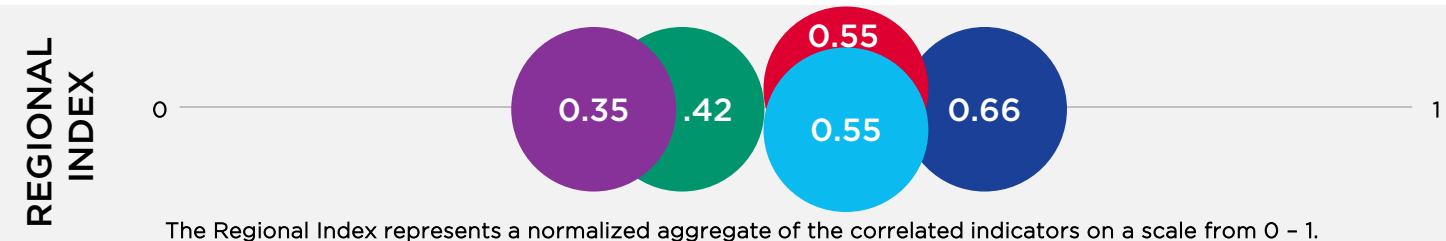
# PRESS FREEDOM

Higher PSM TV and radio market shares, higher PSM funding per capita and a perceived political independence of PSM strongly correlates with higher levels of press freedom in a country. As free and independent media are key for a healthy democracy, a well-funded PSM that is valued by citizens can make a positive contribution.

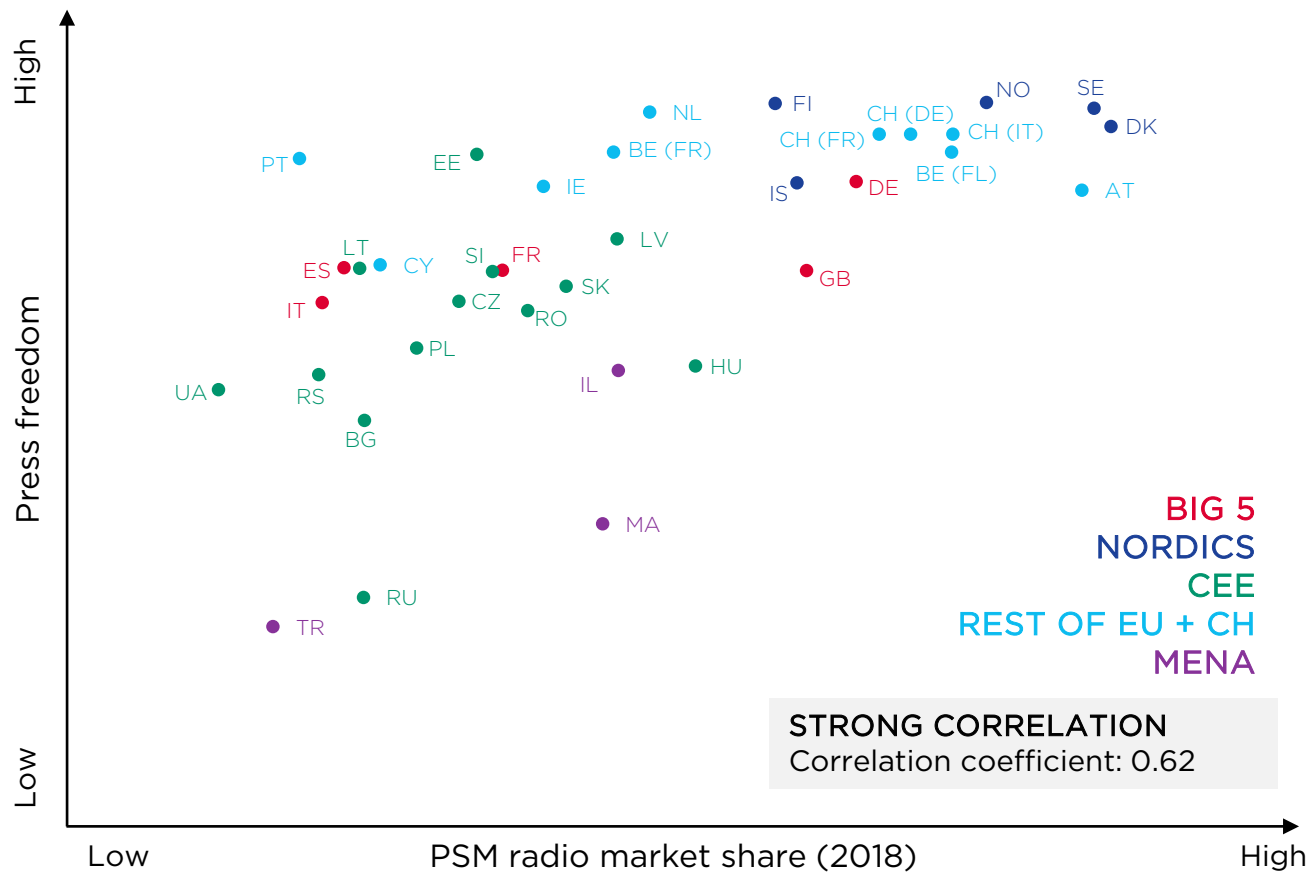
## PSM TV MARKET SHARE vs. PRESS FREEDOM



**PRESS  
FREEDOM  
TENDS TO BE  
HIGHER IN  
COUNTRIES  
WITH A STRONG  
PUBLIC TV**



## PSM RADIO MARKET SHARE vs. PRESS FREEDOM



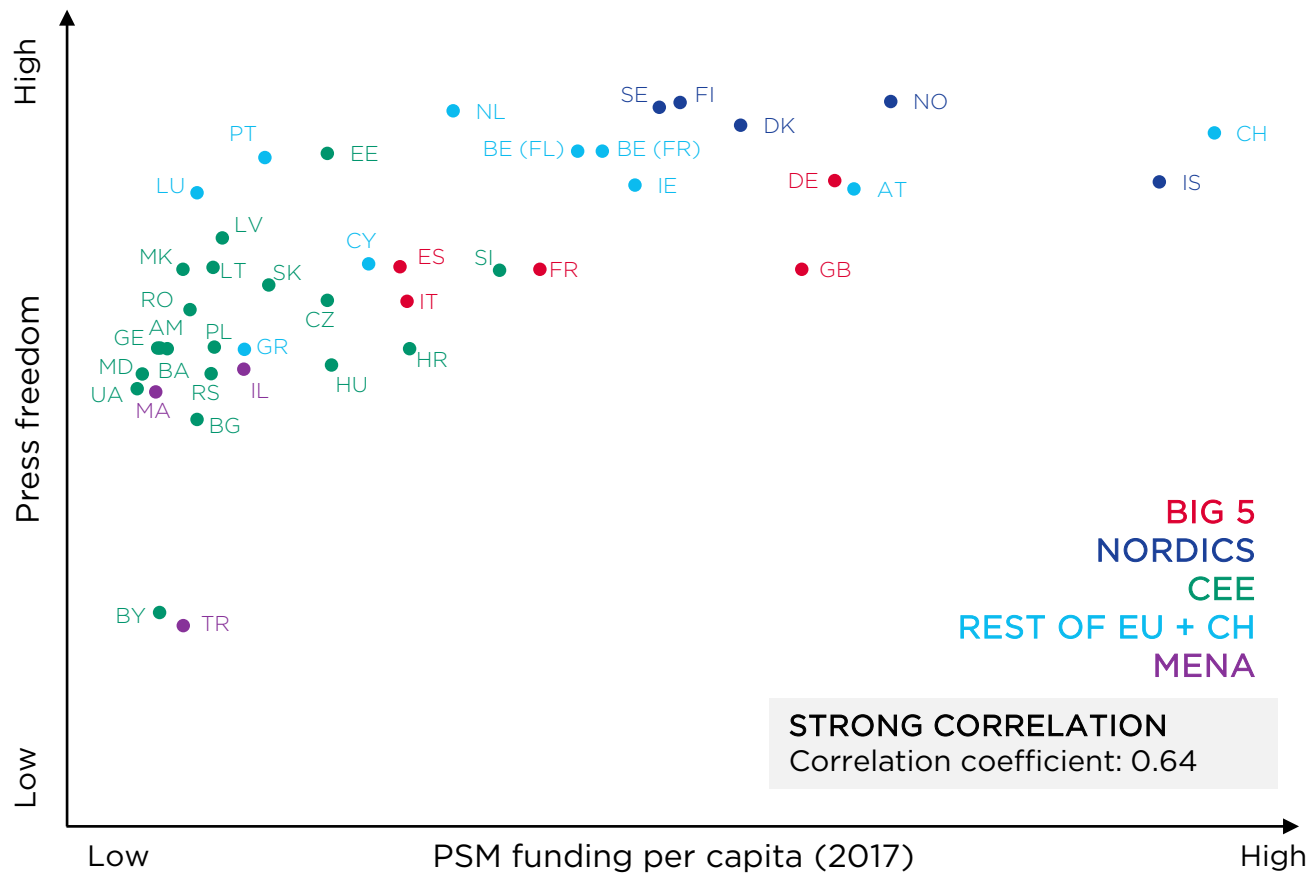
**A NATION'S  
STRONG PSM  
RADIO SHARE  
INDICATES  
HIGHER LEVELS  
OF PRESS  
FREEDOM**

REGIONAL  
INDEX

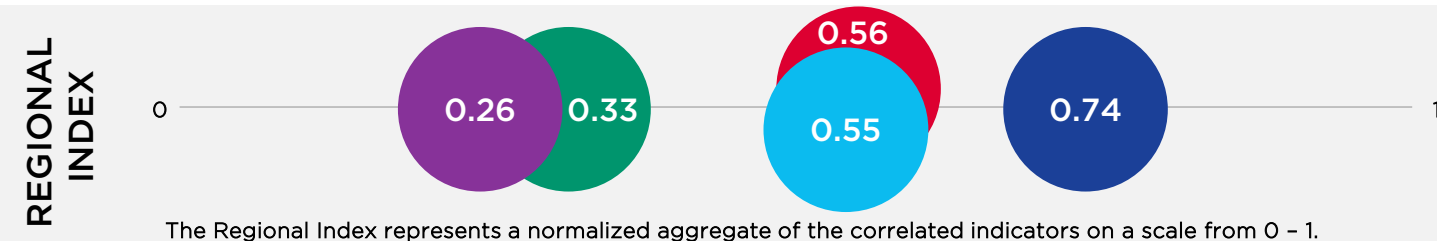


The Regional Index represents a normalized aggregate of the correlated indicators on a scale from 0 – 1.

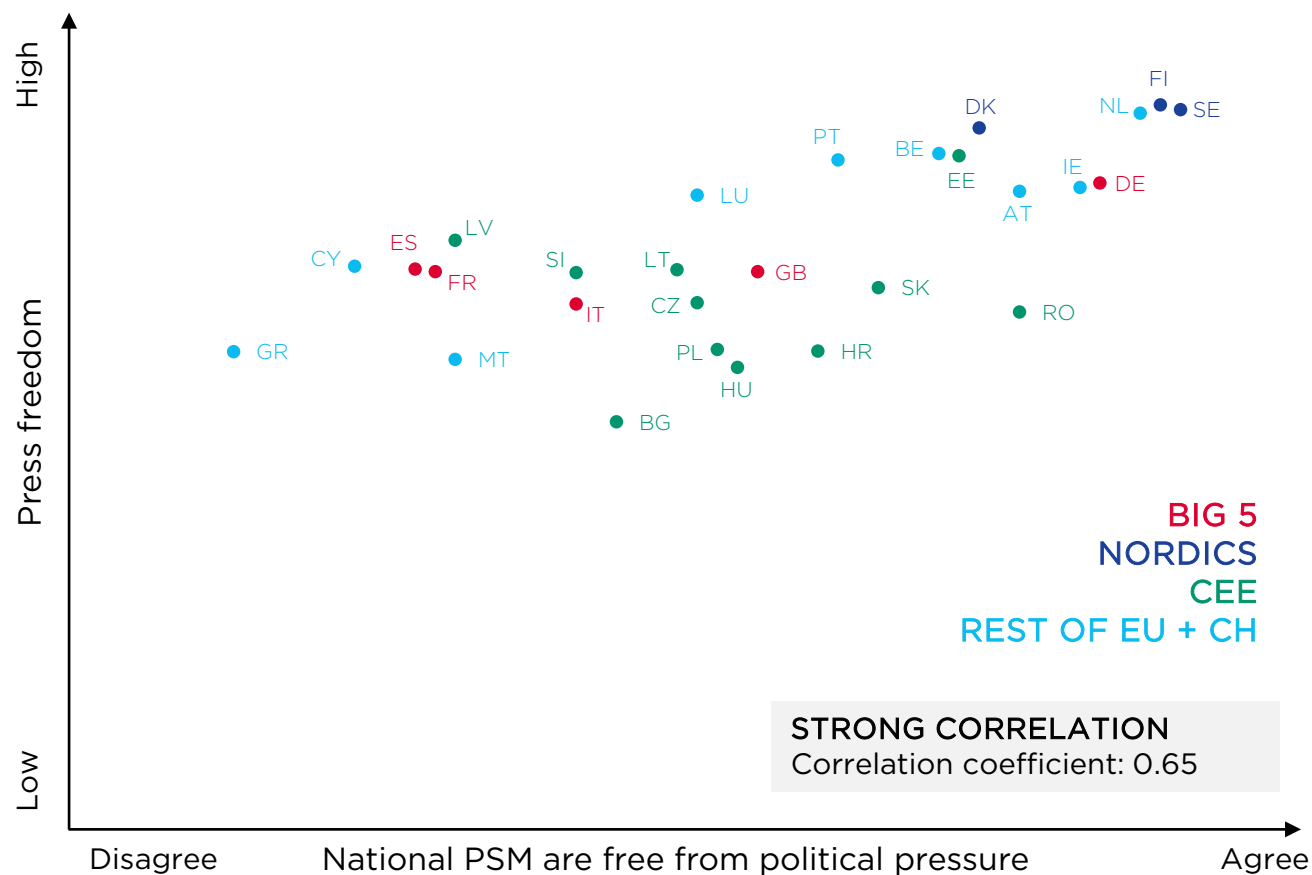
## PSM FUNDING PER CAPITA vs. PRESS FREEDOM



**COUNTRIES  
WITH A HIGH  
PRESS FREEDOM  
TEND TO  
FUND THEIR  
NATIONAL PSM  
MORE**

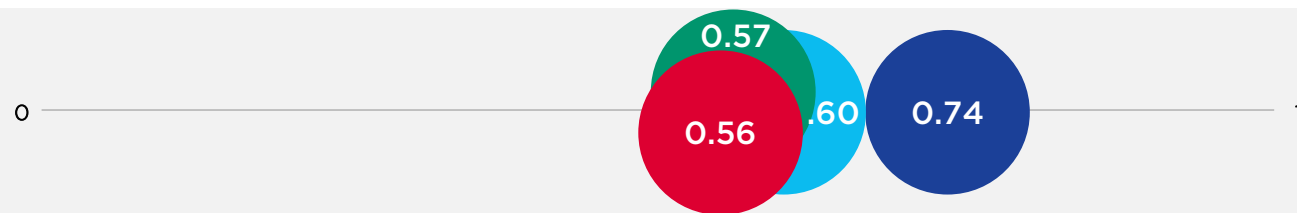


## PERCEIVED POLITICAL PRESSURE ON PSM vs. PRESS FREEDOM



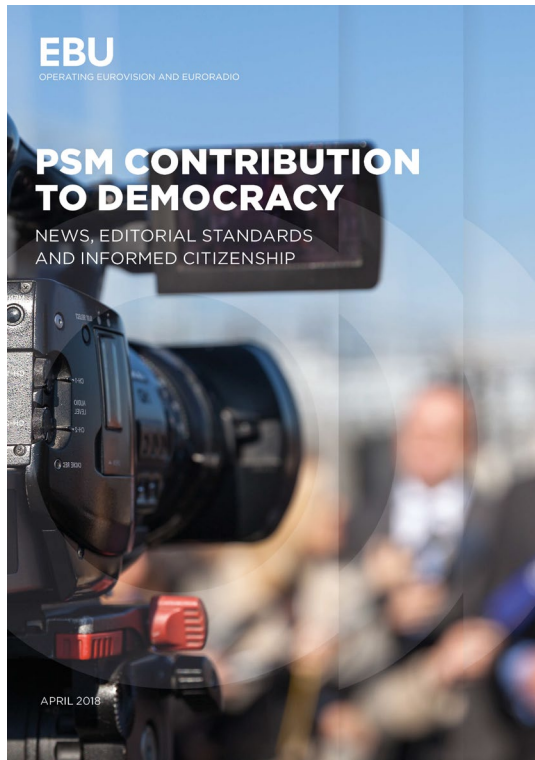
**PSM ARE  
PERCEIVED AS  
MORE  
INDEPENDENT  
IN COUNTRIES  
WITH MORE  
PRESS  
FREEDOM**

REGIONAL  
INDEX



The Regional Index represents a normalized aggregate of the correlated indicators on a scale from 0 – 1.

# WHAT SHOULD I READ NEXT?



## PSM CONTRIBUTION TO DEMOCRACY

A reflection on the democratic value of news and why public service media matters in this regard. Drawing on insights from the latest academic scholarship, this research produces compelling evidence of the democratic value PSM news deliver and serves as a valuable piece for the debate around a core function of PSM.

Download the full report [here](#).

Visit [www.ebu.ch/mis](http://www.ebu.ch/mis) for more Media Intelligence publications.



# MEDIA INTELLIGENCE SERVICE

This report is published by the European Broadcasting Union's Media Intelligence Service (MIS).

MIS provides Member broadcasting organizations with the latest market data, research and analysis needed to plan their future strategies and stay ahead of the game.

Our experts cover a broad range of topics, including TV and radio trends, new media developments, market structure and concentration, funding and public policy issues.

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September 2019

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