

# Media/Entertainment Industry Report | 2014



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2014

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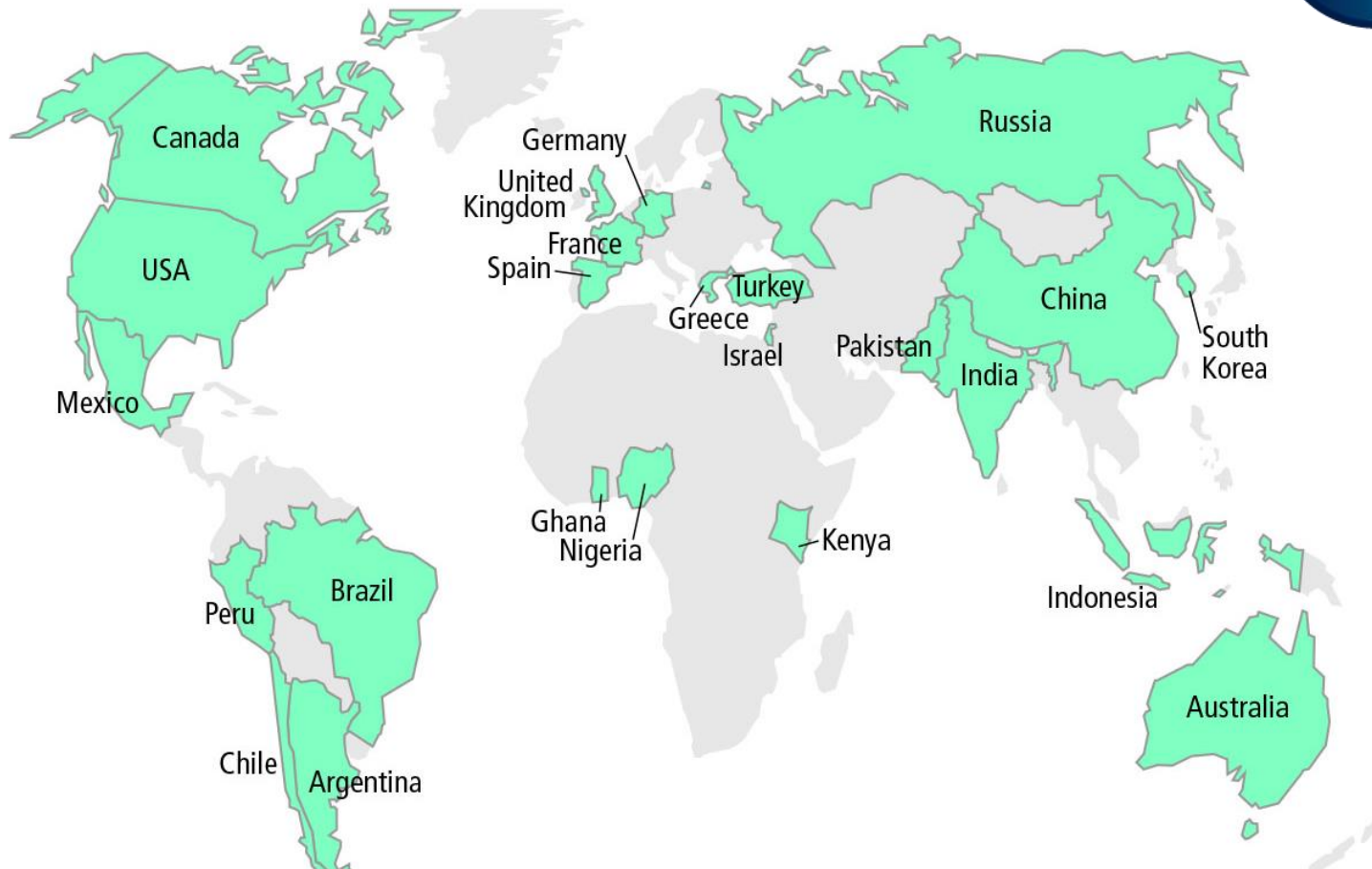
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# Methodology and Participating Countries



Representative samples of 1,000 adults per country in 24 countries  
Some urban-only surveying in certain developing countries  
Face-to-face and telephone interviewing (online in Israel) between December 2013 and April 2014  
Within-country sample error of +/- 2.8 to 4.9 per cent, 19 times out of 20.  
All figures in the charts are expressed in percentages, unless otherwise noted.

## Key Findings



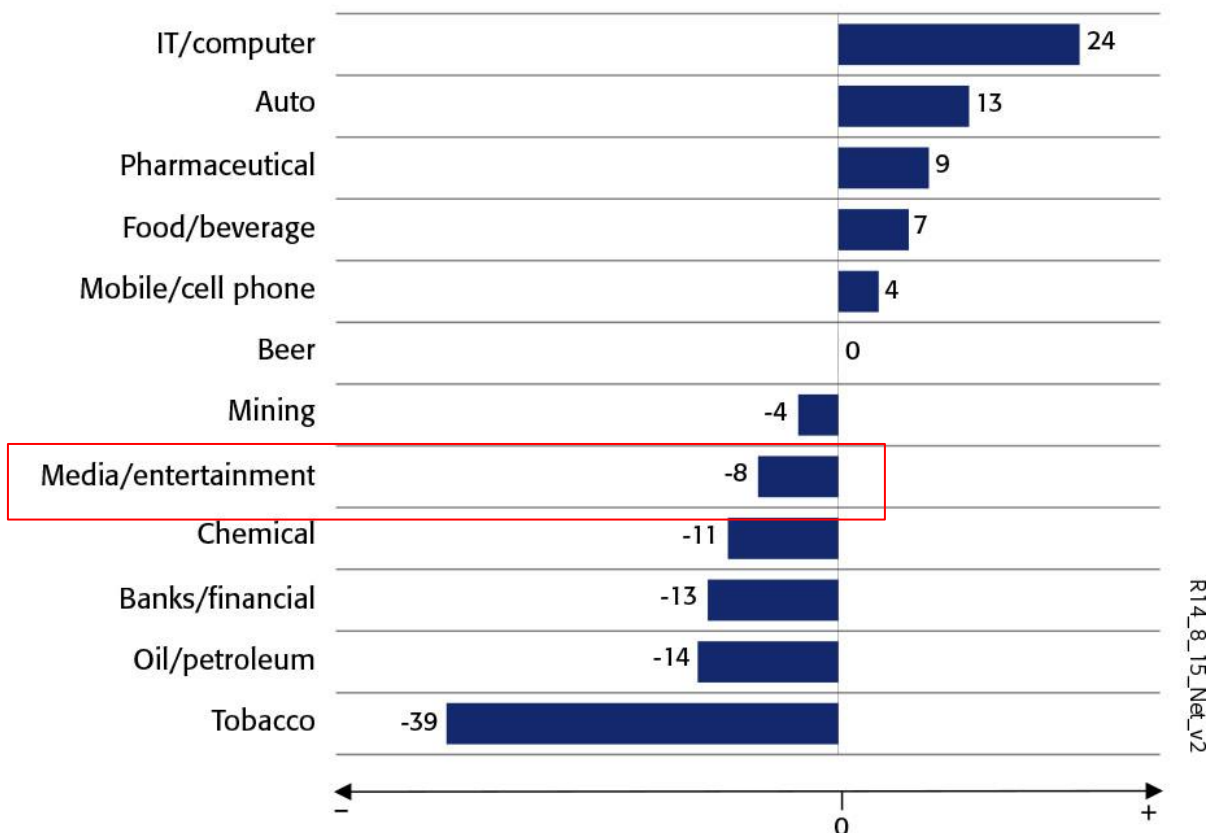
- The media/entertainment industry is among the industries with relatively low levels of trust. Consumers in North America and Europe tend to have the least amount of trust in this industry.
- Nevertheless, the media/entertainment sector is among the industries with the least amount of regulatory pressure. A majority of global consumers feel the industry is sufficiently or over-regulated.
- There is a relationship between low trust and high regulatory pressure, with consumers in countries such as Argentina, Australia, Israel, Spain and the UK expressing relatively low trust in the media/entertainment sector coupled with relatively high levels of regulatory pressure. However, Americans are relatively distrusting of the media/entertainment sector but regulatory pressure in the USA is relatively low, whereas Chinese tend to be trusting of the sector but are also among those who most call for more regulation.
- Operating ethically is the most important issue for this industry, according to consumers globally; Europe has the highest proportion of respondents who feel this is the most important issue. North America has the highest proportion of people who feel biased content is the most important issue the media/entertainment sector should address.

# The media/entertainment industry is among the less trusted sectors, with more people distrusting than trusting it



## Net Trust\* in Industry Sectors

Average of 24 Countries, 2014



There is more distrust than trust in the media industry globally, however the sector is far from being the most distrusted. A significant proportion, three in ten people, have a neutral view of the industry – suggesting there is an opportunity to build trust among “the middle ground” of consumers.

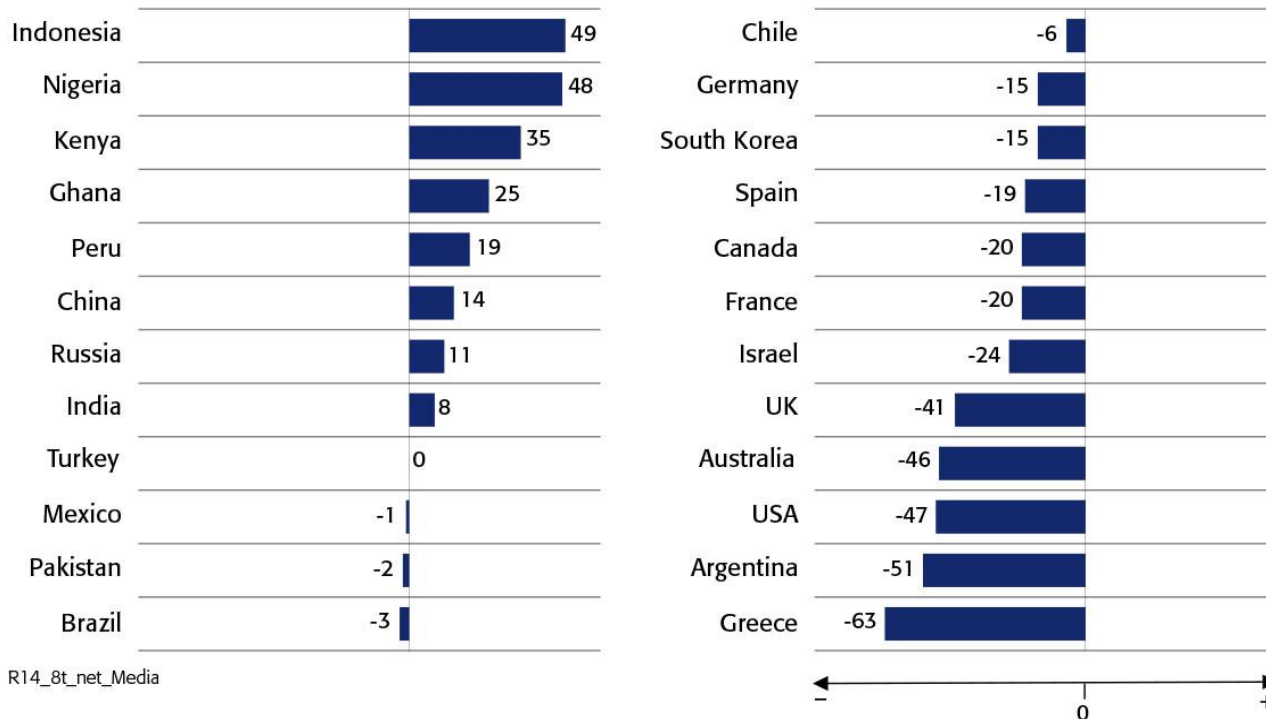
\*“A lot of trust” and “Some trust” minus “Not much trust” and “No trust at all”

# Developing countries, especially in Africa, have more trust than others in the media/entertainment sector



## Trust in Media and Entertainment Companies

Net Ratings,\* by Country, 2014



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\*"A lot of trust" (4+5) minus "No trust" (1+2)

Consumers in developing countries tend to have the most trust in this industry, while those in Anglo-Saxon countries are among the least trusting.

Greeks have especially low trust in this industry.

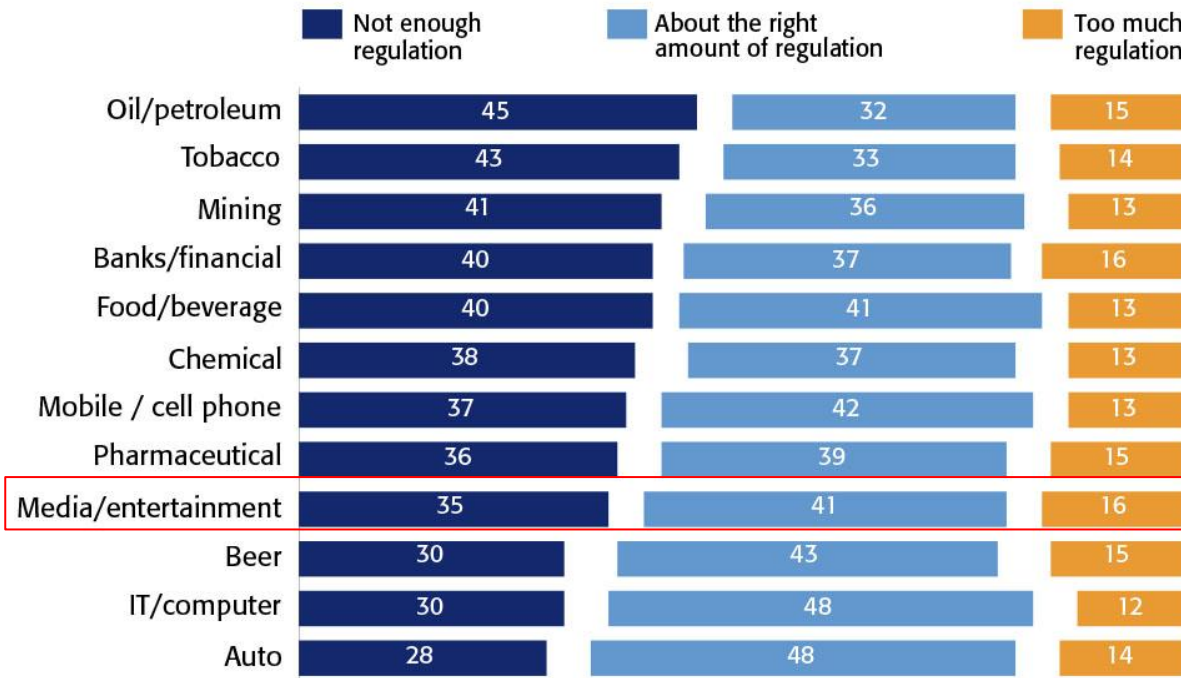


# Relatively low regulatory pressure for the media/entertainment sector



## Assessment of Government Regulation of Industry Sectors

Average of 20 Countries,\* 2014



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\*Includes Argentina, Australia, Canada, Chile, China, France, Germany, Ghana, India, Indonesia, Kenya, Mexico, Nigeria, Pakistan, Peru, Russia, Spain, Turkey, UK, and USA

The white space in this chart represents "DK/NA."

Although the media industry is not especially trusted, there is not a high level of health and safety regulatory pressure compared to other sectors.

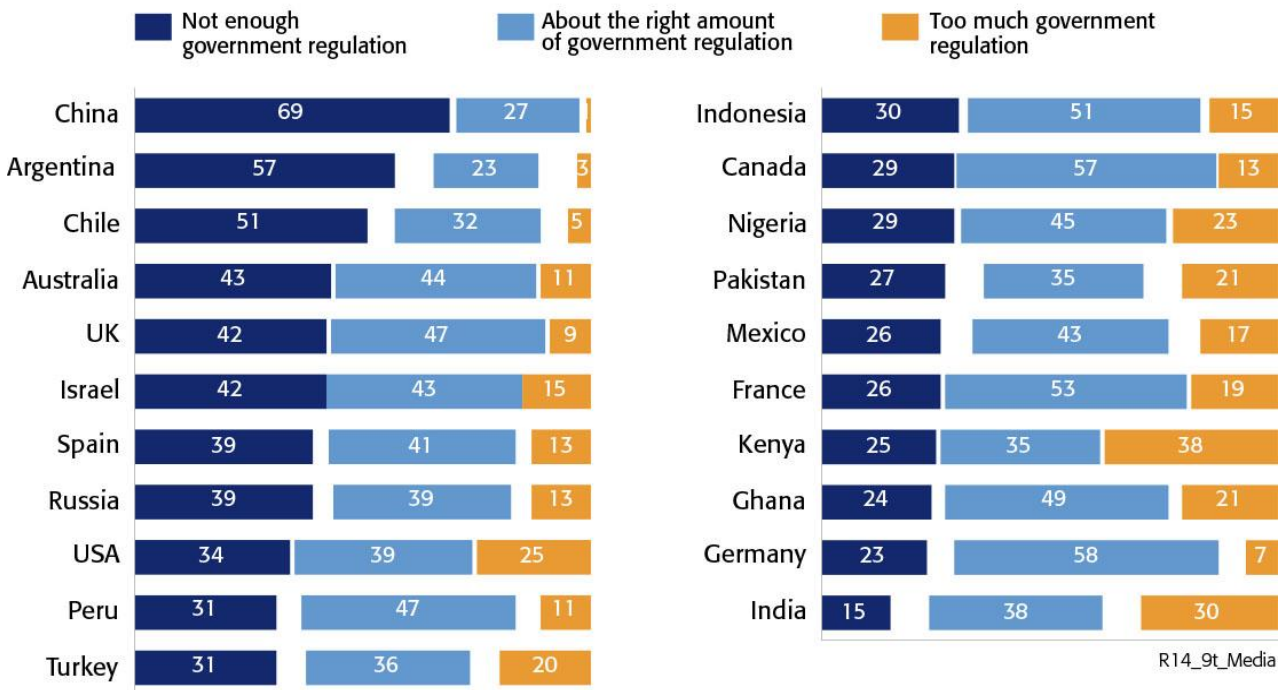
The majority of respondents feel the media sector already has the right amount of, or too much, government regulation.

# People in most countries think that there is enough regulation of the media/entertainment sector



## Assessment of Government Regulation of Media and Entertainment Companies

By Country, 2014



The white space in this chart represents "DK/NA."

Majorities of Germans, Canadians, French, and Indonesians are satisfied with the amount of regulation of the media/entertainment industry, a sentiment shared by pluralities in most other countries surveyed.

However, regulatory pressure for the industry is very strong in China, as well as in Argentina and Chile, where majorities call for more government regulation.

Kenyans and Indians are more wary than others of too much regulation.

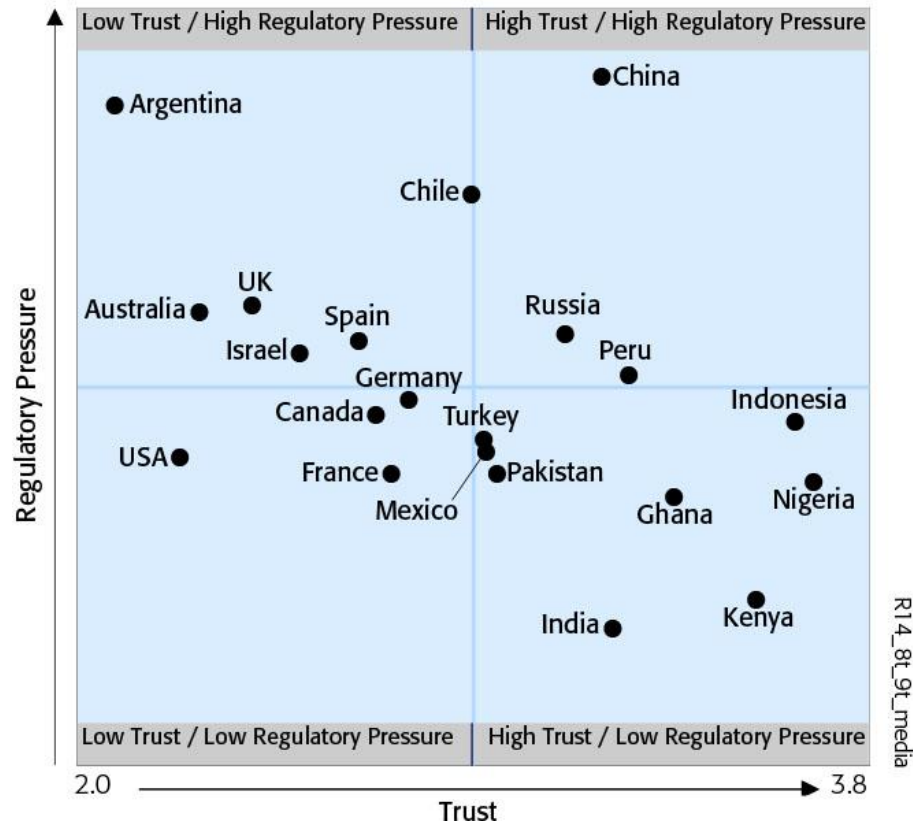


# Generally, the lower the trust in the media/entertainment sector, the more regulatory pressure from the public



## Trust vs Regulatory Pressure

Media and Entertainment Companies, 2014



Argentineans, Australians, British, Israelis and Spanish citizens are relatively distrusting of the media/entertainment sector and tend to call for more regulation of it. Americans, however, are relatively distrusting of the sector but not especially interested in more regulation. Chinese tend to trust the sector but are among those who most call for increased regulation (as the Chinese do for other sectors).

In contrast, countries with both high trust and low regulatory pressure for the industry are all developing countries., notably all of the African markets surveyed.

Q8t. Please tell me how much you trust each of the following types of companies

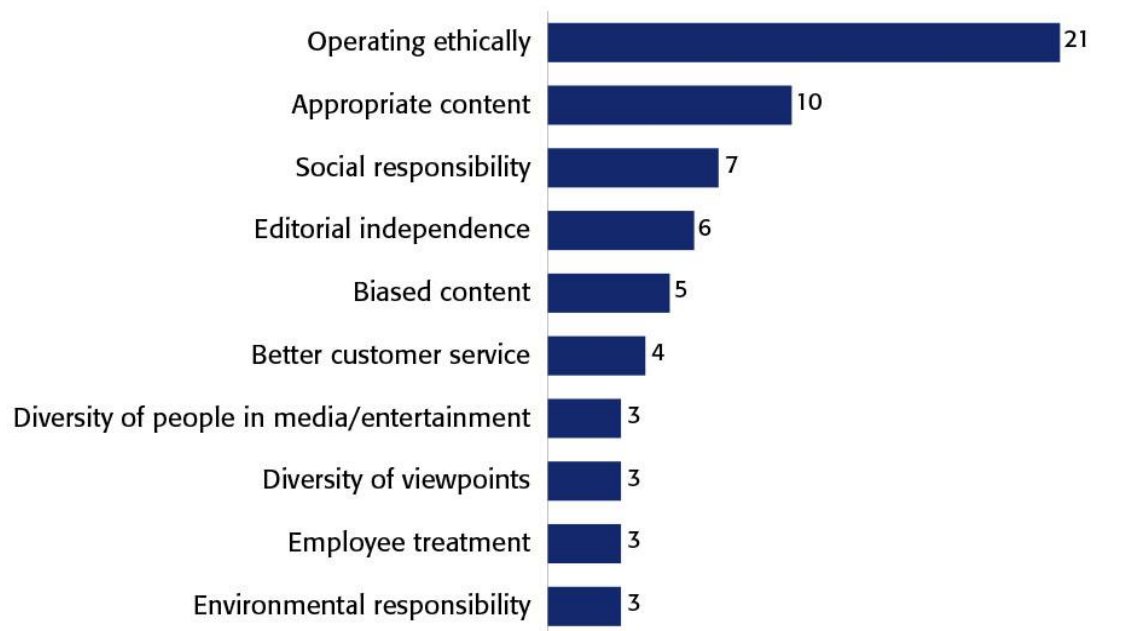
Q9t. For each of the following types of companies, please tell me if you think our government does too much, about the right amount, or not enough in regulating their activities to ensure the health and safety of society.

# Ethics is the most cited concern for the media/entertainment sector



## Most Important Issue the Media and Entertainment Industry Needs to Address

Unprompted, Top Mentions, Average of 21 Countries,\* 2014



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Overwhelmingly, consumers would like the media/entertainment industry to address ethical concerns with the way it operates. Appropriate content is also seen as a key concern for this industry. Many mention social responsibility issues and lack of editorial independence as important areas to address.

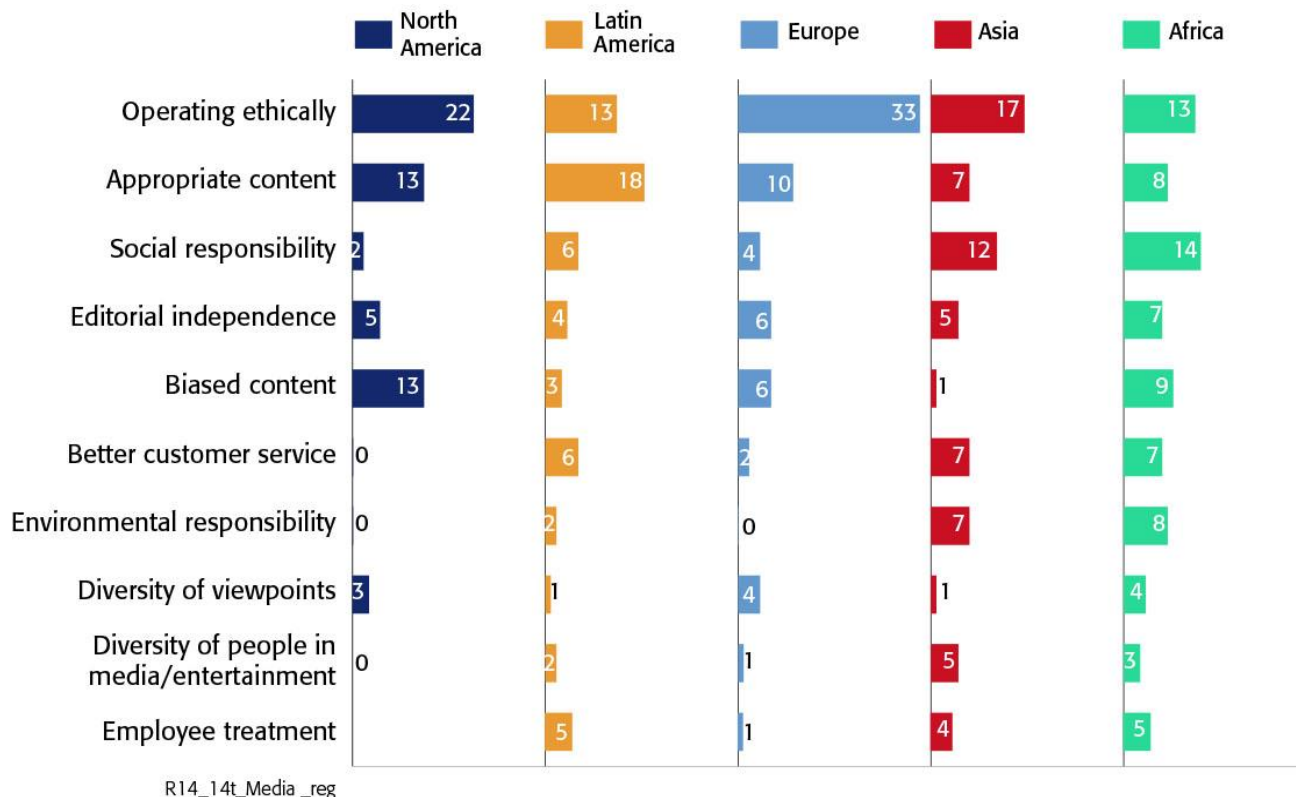
\*Not asked in Argentina, Brazil, and South Korea

# Europeans are particularly concerned about ethics in the media sector, also a top concern among North Americans



## Most Important Issue the Media and Entertainment Industry Needs to Address

Unprompted, Top Mentions, by Region, 2014



Latin America has the largest proportion of respondents concerned about appropriate content.

Social responsibility is perceived as more important in Asia and Africa than in other regions.

North Americans are especially concerned about biased content.

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# Ethics is the top concern in North America, the UK, and Australia



## Most Important Issue the Media and Entertainment Industry Needs to Address

Unprompted, Selected Countries, 2014

	Australia	Canada	China	Germany	India	Indonesia
1st	Operating ethically (27%)	Operating ethically (18%)	Operating ethically (25%)	Appropriate content (15%)	Social responsibility (13%)	Social responsibility (21%)
2nd	Biased content (11%)	Biased content & Appropriate content (11% each)	Appropriate content (16%)	Operating ethically (12%)	Operating ethically (12%)	Appropriate content (14%)
3rd	Appropriate content (8%)	Quality / avoid sensationalism (7%)	Social responsibility (11%)	Editorial independence (5%)	Better customer service (9%)	Operating ethically & Editorial independence (13% each)
	Kenya	Mexico	Nigeria	Turkey	UK	USA
1st	Operating ethically (20%)	Appropriate content (12%)	Social responsibility (16%)	Operating ethically (18%)	Operating ethically (32%)	Operating ethically (27%)
2nd	Appropriate content (15%)	Social responsibility & Better customer service (8% each)	Better customer service (10%)	Editorial independence (13%)	Editorial independence (8%)	Biased content (15%)
3rd	Editorial independence (13%)	Operating ethically (7%)	Operating ethically & Biased content (9% each)	Social responsibility (9%)	Biased content (7%)	Appropriate content (14%)

Ethics is the top concern in seven out of 12 countries surveyed, including North America, UK, and Australia.

Developing countries, such as India, Indonesia, and Nigeria, tend to mention social responsibility issues.

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