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# Central Europe Media Programme (CEMP) Research

## Mapping audience opportunities for independent media

Publication date: June 2024 (Fieldwork data gathered February-March 2023)

# Agenda

## 1. The CEMP Project and its objectives

## 2. Research Methodology

## 3. Findings in detail

- Target audiences
- Current media consumption and platforms
- Willingness to pay
- Trust levels and preferred content
- Attitudes towards media

## 4. Q&A

# Supporting independent media in Central Europe

**Overall Objective:**

*Strengthening the competitiveness, financial independence, and sustainability of the independent media sector in Central Europe.*

**Countries covered:** 5

**Duration:** 5 years

**Client:** USAID

**Lead:** Zinc Network

**Partner:** IREX

# Research questions were based on our key objectives

| RESEARCH OBJECTIVES | RESEARCH QUESTONS | |
|---|---|---|
| Identify audience growth opportunities | How are different segments in the population engaging with media? | Which segments are easier target audiences for independent media? |
| Drive reader revenue | Which audiences are more likely to pay for content? | What factors increase people's willingness to pay? |
| Build trusted brand reputations | Which media organisations do people trust? | What leads target audiences to trust media organisations? |

# Methodology in detail

### Online Methodology

Online quantitative survey

15 minutes interview length

Incidence rate is always above 97% in all countries

### Country representative

Over 2,000 respondents in each country

Representative of each country by **age, gender and region** (in some cases by education too) in line with census data. Weighting efficiency is always above 89%.

### Fieldwork in early 2023

February – March 2023

### Cluster analysis

K-means clustering

continuous variables selected based on local expertise.

Segmented along **political views, views on the media, cognitive openness**

# We segmented populations across all 5 countries based on people's similarities along 3 key dimensions:

A few examples of variables that were used to segment the populations

### Political and social views

Agreement to:

- [My country] should **accelerate/reverse** integration with the EU
- It is best to have a **strong leader** who can make decisions without interference**/strong parliament** to hold government to account

Who is more likely to engage with independent media-led content?

### Views/Expectations of the media

Agreement to:

- It is important that media **respect the authorities**
- **The government** of my country has a positive/negative influence on the media
- **The EU** has a positive/negative influence on the media

Who's needs can independent media satisfy?

### Cognitive Openness

Agreement to:

- I am better informed than most
- "Truth" is just what someone chooses to believe

Who is not currently accessing independent media but is open to changing media habits?

*NB: The variables listed are not exhaustive and for illustrative purposes only. We adapted the choice of variables for each country based on local context.*

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# Key Variables

## DEMOGRAPHICS

- Age
- Gender
- Region
- Language spoken at home
- Educational level
- Employment status
- Media language
- Financial status

## IDENTITY AND VALUE ALIGNMENT

- European, national and regional identity
- Religious, political, linguistic affiliation
- Conservative/Liberal values
- Attitudes towards polarising organisations
- Alignment with countries/organisations

## CURRENT MEDIA CONSUMPTION

- Access to different media types
- Access to TV channels
- Access to online news outlets
- Awareness of outlets
- Technology used to access
- Social media consumption
- Type of news consumed
- Attributes of online outlets

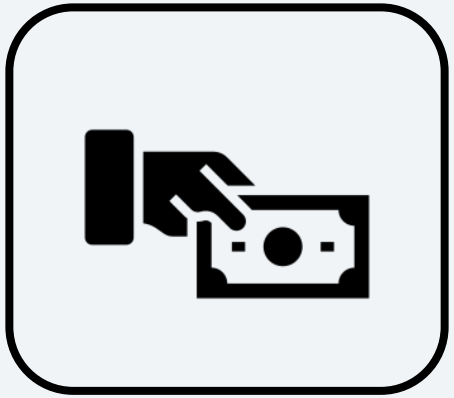
## EXPECTATIONS FOR MEDIA

- Willingness to pay for content
- Subscription drivers
- Trust drivers
- Performance of outlet on trust drivers
- Media impartiality

# Key focus area of research

Identifying target audiences

Current media exposure and engagement



Willingness to pay for media and preferred content

Trust in the media and desired content

Attitudes towards the media

# Starting with our first focus area…

**Identifying target audiences**

Current media exposure and engagement

Willingness to pay for media and preferred content

Trust in the media and desired content

Attitudes towards the media

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# Out of 5 clusters overall, we identified one cluster as currently being most engaged with independent media

**Less open to independent media** → **More open to independent media**

| | Target audiences |
|---|---|
| HUNGARY | 9% |
| POLAND | 33% |
| ROMANIA | 21% |
| SLOVENIA | 28% |
| BULGARIA | 12% |

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# Across all countries this cluster is more liberal, educated, financially well-off, and currently engages with independent media more

| | Engaged Liberals 9% | Engaged Liberals 33% | Engaged Liberals 21% | Engaged Liberals 28% | Discerning Liberals 12% |
|---|---|---|---|---|---|
| **Income** / **Education** | High income and High education | Moderate income and mid-education | High income and High education | High income and High education | High income and High education |
| **Identity** | Being European | Being European | Being European | Being European | Being European and Bulgarian |
| **Media engagement** | Highest engagement of independent media | Highest engagement of independent media | Highest engagement of independent media | Highest engagement of independent media | Highest engagement of independent media |
| **Trust in media** | Highest trust for independent media | Highest trust for independent media | Highest trust for independent media | Highest trust for independent media | Higher trust for independent media |
| **Willingness to pay for media** | 40% say they are willing to pay | 47% say they are willing to pay | 39% say they are willing to pay | 32% say they are willing to pay | 44% say they are willing to pay |
| **Low Exposed** | 24% | 99% | 36% | 50% | 6% |

# Further two clusters have been identified as not engaging as much with independent media, but being open to

**Less open to independent media** → **More open to independent media**

| | Target audiences |
|---|---|
| HUNGARY | 36% |
| POLAND | 35% |
| ROMANIA | 36% |
| SLOVENIA | 42% |
| BULGARIA | 42% |

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# A pro-western, open-minded cluster has been identified as a current untapped audience and revenue growth opportunity for independent media across all 5 countries

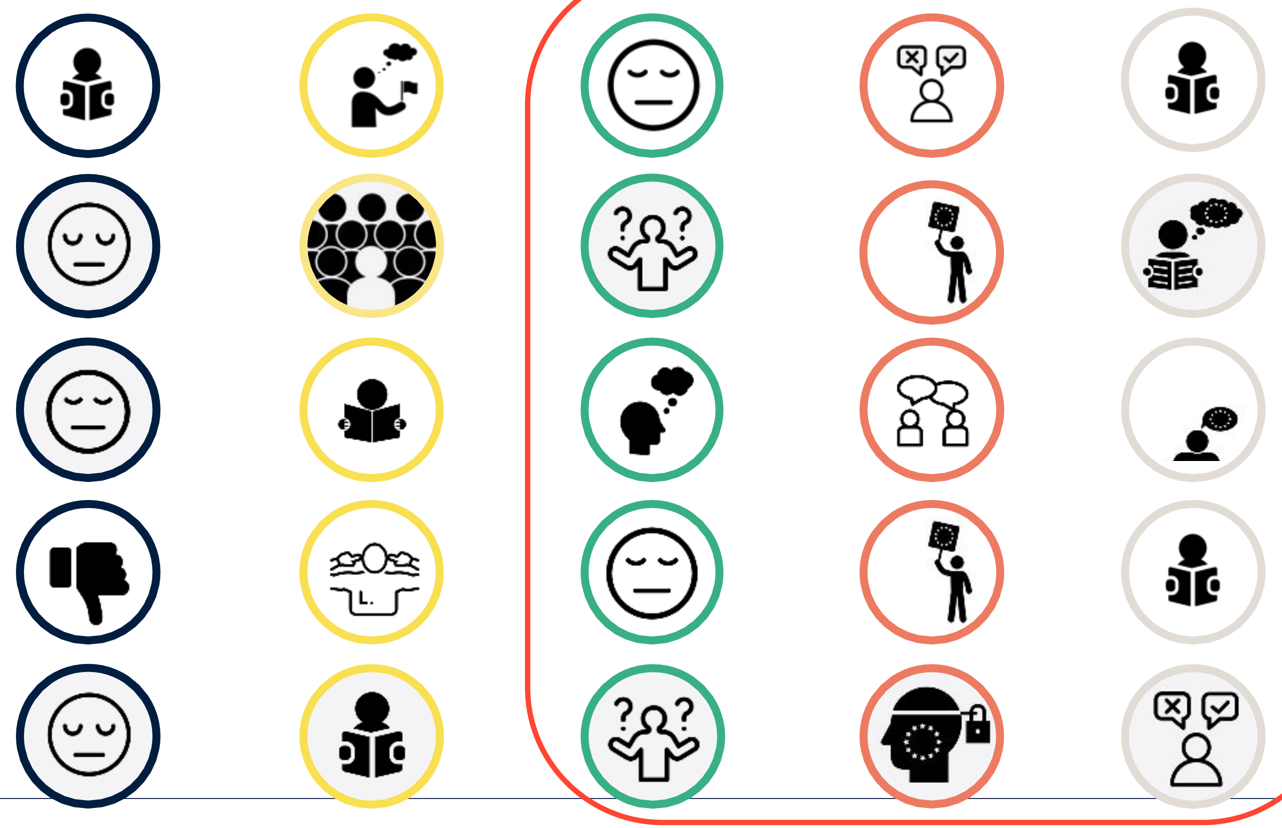
| | Discerning Europeans | Informed Conservatives | Open-minded Europeans | Hopeful Europeans | Closed-minded Liberals |
|---|---|---|---|---|---|
| | 20% | 13% | 15% | 22% | 18% |
| Income / Education | Average income and Average education | Moderate income and mid-education | Moderate income and High education | Moderate income and High education | High income and High education |
| Identity | Being European | Being Polish | Being European | Being European and Slovenian | Being European and Bulgarian |
| Media engagement | High engagement of independent media | High engagement of independent media | High engagement in independent media | Average engagement with independent | High engagement of all media types |
| Trust in media | Higher trust for independent media | Low trust for independent media | High trust in independent media | Slightly higher trust than other groups | Higher trust for independent media |
| Willingness to pay for media | 30% say they are willing to pay | 47% say they are willing to pay | 53% say they are willing to pay | 32% say they are willing to pay | 41% say they are willing to pay |
| Low Exposed | 14% | 92% | 26% | 53% | 4% |

# An opportunity to attract an undecided, often less engaged, and more open-minded cluster was also identified for independent media across all 5 countries

| | Disengaged Democrats | Relaxed Centrists | Curious Centrists | Disillusioned Centrists | Open-minded Centrists |
|---|---|---|---|---|---|
| | 16% | 22% | 21% | 20% | 24% |
| Income<br>Education | High income and High education | Moderate income and mid-education | Moderate income and mid-education | Moderate income and mid-education | Moderate income and Low education |
| Identity | Being European | Being Polish | Being Romanian | Being Slovenian | Being Bulgarian |
| Media engagement | High awareness of independent media | High engagement of independent media | High engagement of independent media | Average engagement with independent | Low engagement of independent media |
| Trust in media | Higher trust for independent media | Low trust for independent media | High trust for all types of media | Low trust for all types of media | Low trust for all types of media |
| Willingness to pay for media | 26% say they are willing to pay | 43% say they are willing to pay | 49% say they are willing to pay | 32% say they are willing to pay | 41% say they are willing to pay |
| Low Exposed | 21% | 100% | 20% | 54% | 2% |

# Together, these three clusters, if targeted, constitute an opportunity for audience growth for independent media

**Less open to independent media** → **More open to independent media**



| | Target audiences |
|---|---|
| HUNGARY | 45% |
| POLAND | 68% |
| ROMANIA | 57% |
| SLOVENIA | 70% |
| BULGARIA | 54% |

# Independent media has the opportunity to reach larger untapped audiences

# To reach key audiences, we need to know where they are spending their time…

Identifying target audiences

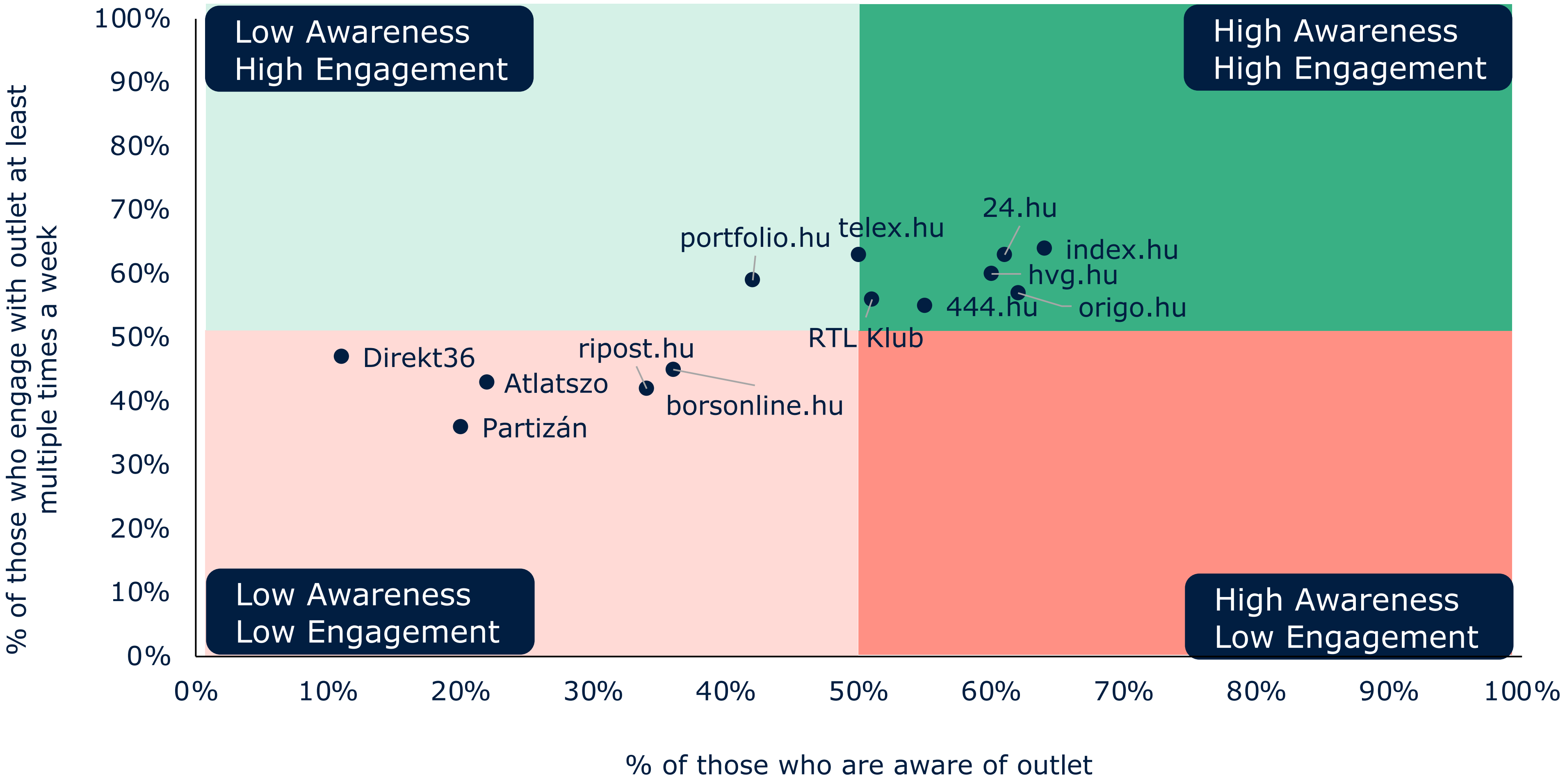
Current media exposure and engagement

Willingness to pay for media and preferred content

Trust in the media and desired content

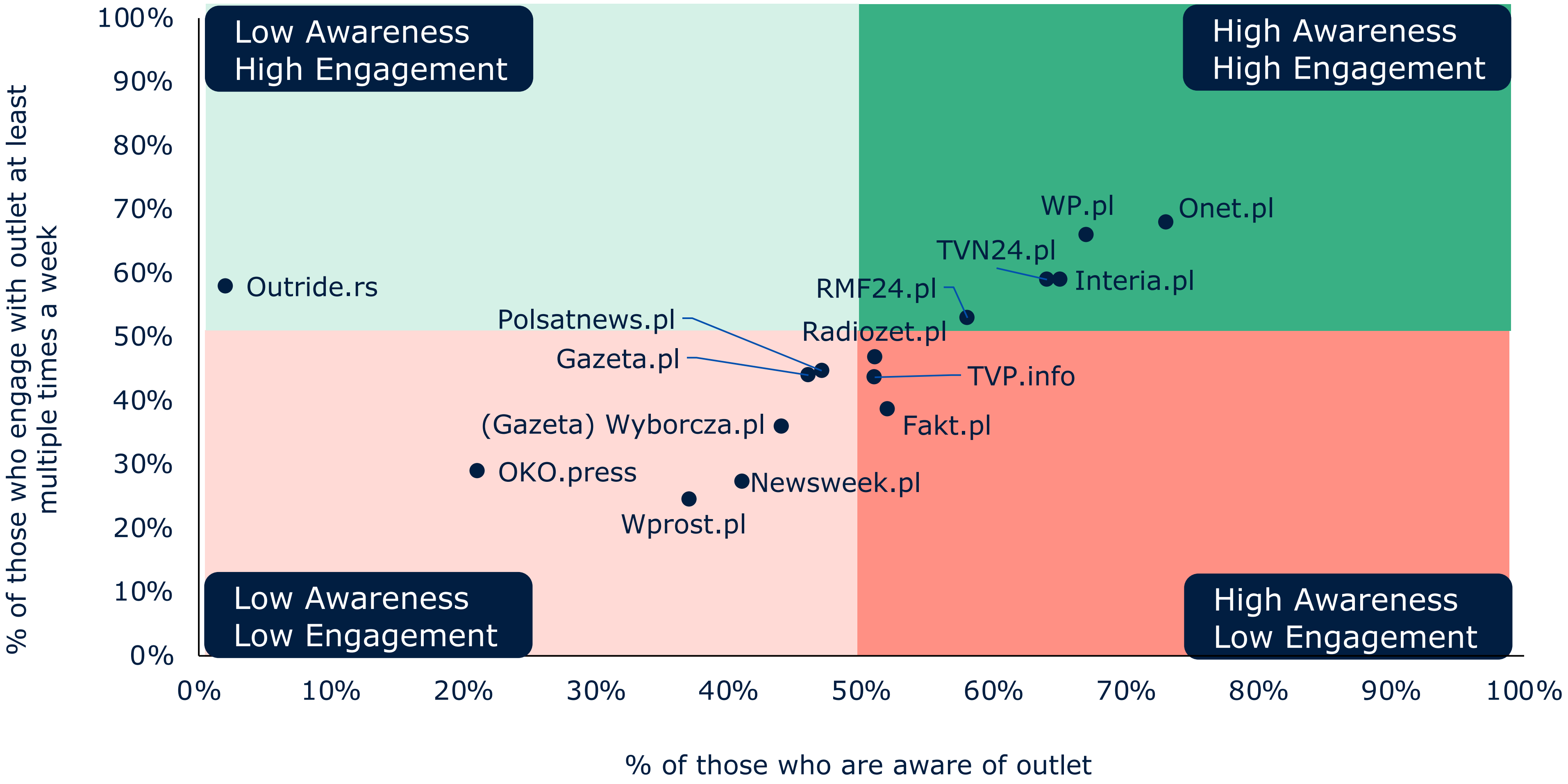
Attitudes towards the media

# In Hungary, well-known independent and non-independent outlets are competing for attention




Q7. Which of these outlets are you aware of? Base: Those who have used online news sites/apps at least once a month. (1953), Informed Conservatives (392), Open-minded Nationalists (680), Disengaged Democrats (311), Discerning Europeans (380), Extreme Liberals (176)
Q8. And typically how often do you use each of the following online news sources? Base: Those aware of the outlet, varies by outlet

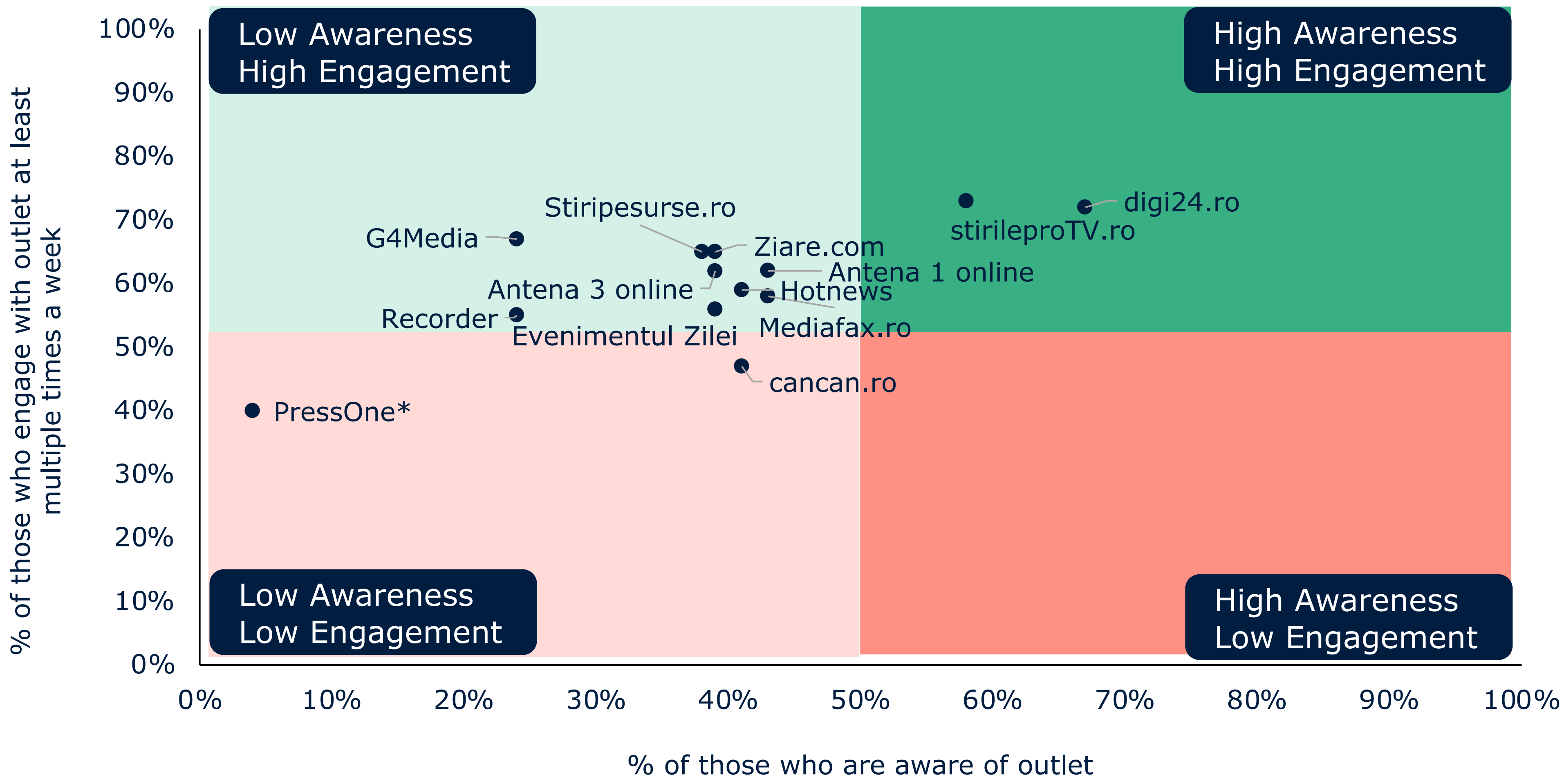
# Onet, WP and Interia are the most well-known and engaged with outlets in Poland





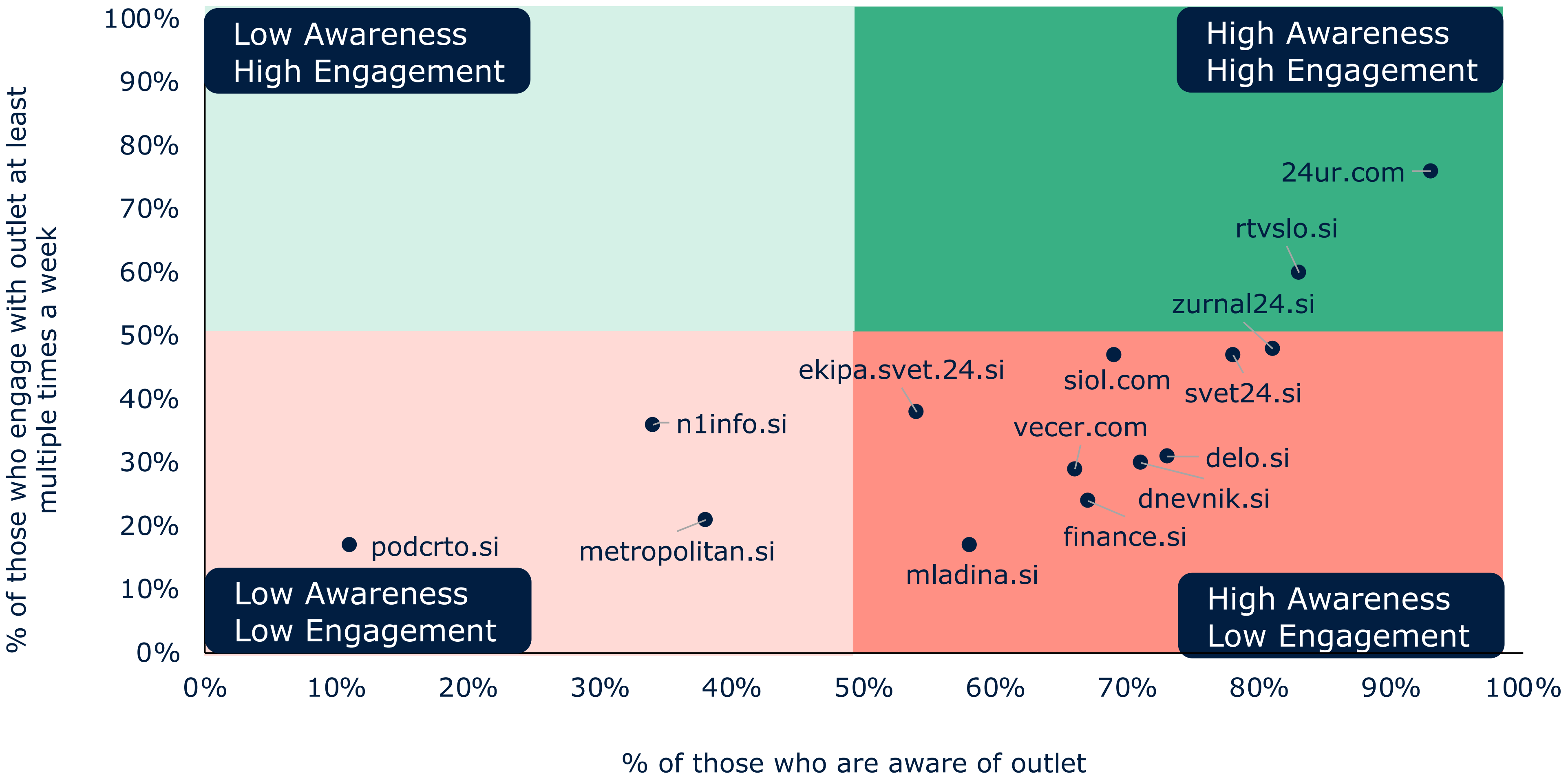

 

# Digi24 and Stirile ProTV are the most known and engaged with outlets in Romania



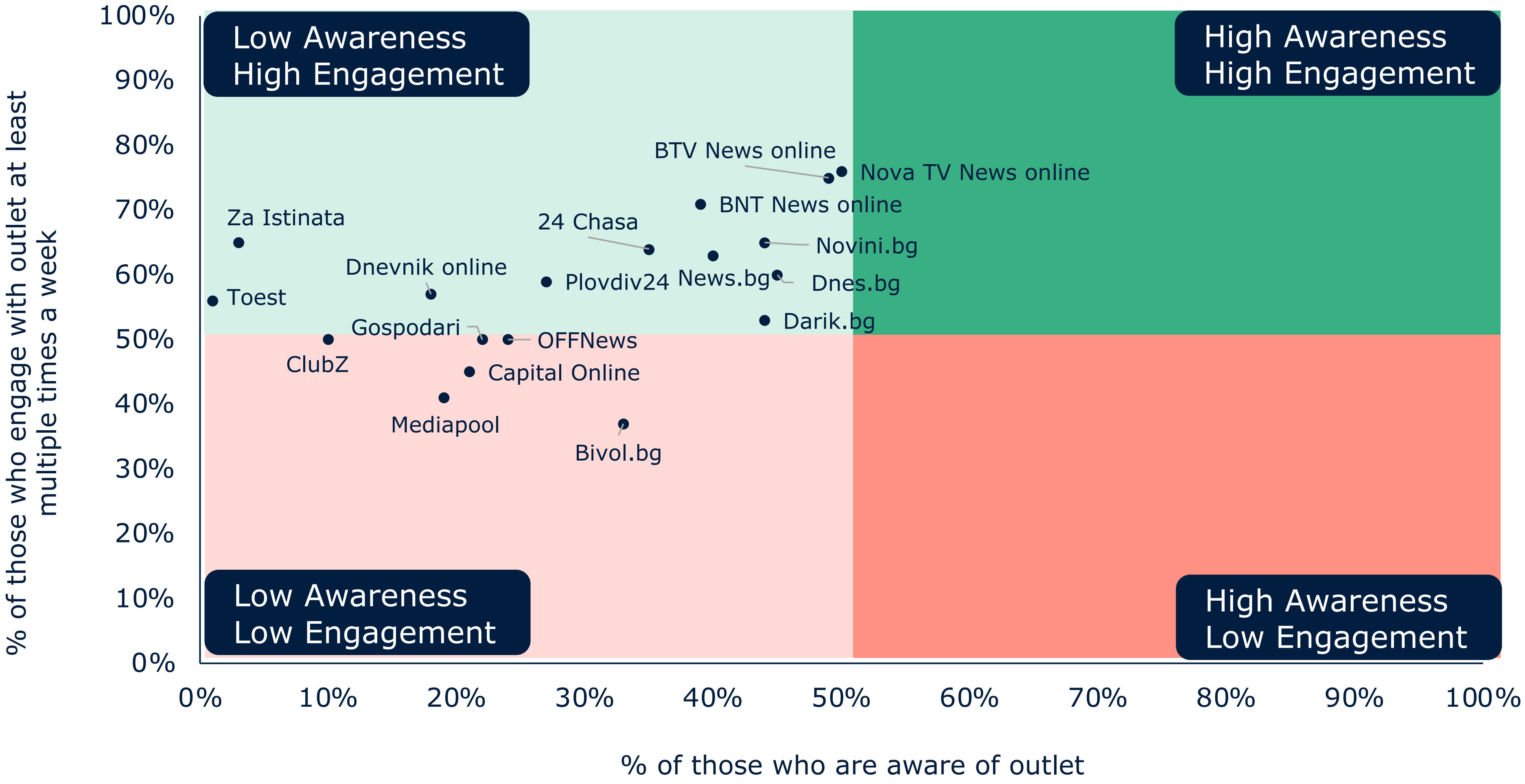

Q7. Which of these outlets are you aware of? Base: Those who have used online news sites/apps at least once a month. (1971), Disengaged Conservatives (346), Informed Conservatives (434), Curious Centrists (396), Open-minded Europeans (281), Engaged Liberals (404) Q8. And typically how often do you use each of the following online news sources? Base: Those aware of the outlet, varies by outlet

# Only a small number of well-known outlets have also high levels of engagement in Slovenia




Q7. Which of these outlets are you aware of? Base: Those who have used online news sites/apps at least once a month. (1955), Sceptics (392), Detached (229), Disillusioned Centrists (392), Hopeful Europeans (433), Engaged Liberals (506) Q8. And typically how often do you use each of the following online news sources? Base: Those aware of the outlet, varies by outlet

# Many outlets in Bulgaria can still increase both audience awareness and engagement




Q7+8. Thinking about the past month, on average, how often do you access the following media platforms when consuming all types of media? Base: All (2066), Disengaged Conservatives (375), Informed Conservatives (589), Open-minded Centrists (498), Closed-minded Liberals (362), Discerning Liberals (242). Engagement is based on only those aware of the outlet.

# News websites are significantly favoured by key target audiences across countries while social media and TV remain popular platforms overall

% of those accessing each platform at least multiple times per week

Text in green is statistically higher than average; text in red is statistically lower

| | News websites/Apps | | | Social media | | | TV | | |
|---|---|---|---|---|---|---|---|---|---|
| HUNGARY | 95% | 90% | 89% | 87% | 90% | 91% | 80% | 84% | 83% |
| POLAND | 85% | 91% | 83% | 87% | 93% | 90% | 89% | 90% | 84% |
| ROMANIA | 85% | 89% | 86% | 89% | 89% | 88% | 90% | 92% | 91% |
| SLOVENIA | 90% | 91% | 86% | 84% | 84% | 82% | 92% | 90% | 89% |
| BULGARIA | 88% | 87% | 80% | 91% | 92% | 93% | 92% | 93% | 90% |

Q2. Thinking about the past month, on average, how often do you access the following media platforms when consuming all types of media? Base: All Hungary (2017), All Poland (2017), All Romania (2012), All Slovenia (2034), All Bulgaria (2066)

# Alternative platforms are particularly appealing to younger audiences across the board

% of all 18-34 that access these platforms at least multiple times a week

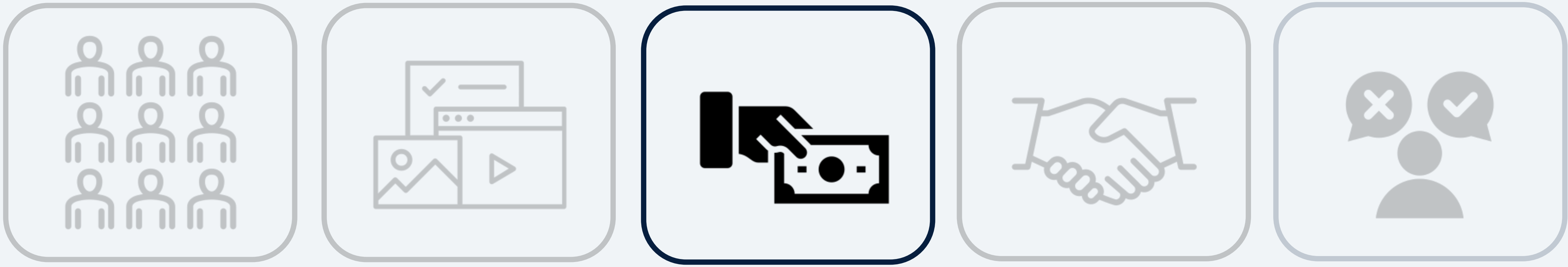
| | HUNGARY 18-34 Year Olds | POLAND 18-34 Year Olds | ROMANIA 18-34 Year Olds | SLOVENIA 18-34 Year Olds | BULGARIA 18-34 Year Olds |
|---|---|---|---|---|---|
| VOD | 72% | 71% | 79% | 62% | 72% |
| Music streaming | 74% | 70% | 81% | 59% | 66% |
| Podcasts | 50% | 70% | 68% | 49% | 59% |

Green = statistically higher than average

Q2. Thinking about the past month, on average, how often do you access the following media platforms when consuming all types of media? Base: All Hungary (2017), All Poland (2017), All Romania (2012), All Slovenia (2034), All Bulgaria (2066)

# Besides building a strong online presence, independent media should use alternative platforms to engage new and younger audiences

# We also investigated people's willingness to pay…



Identifying target audiences

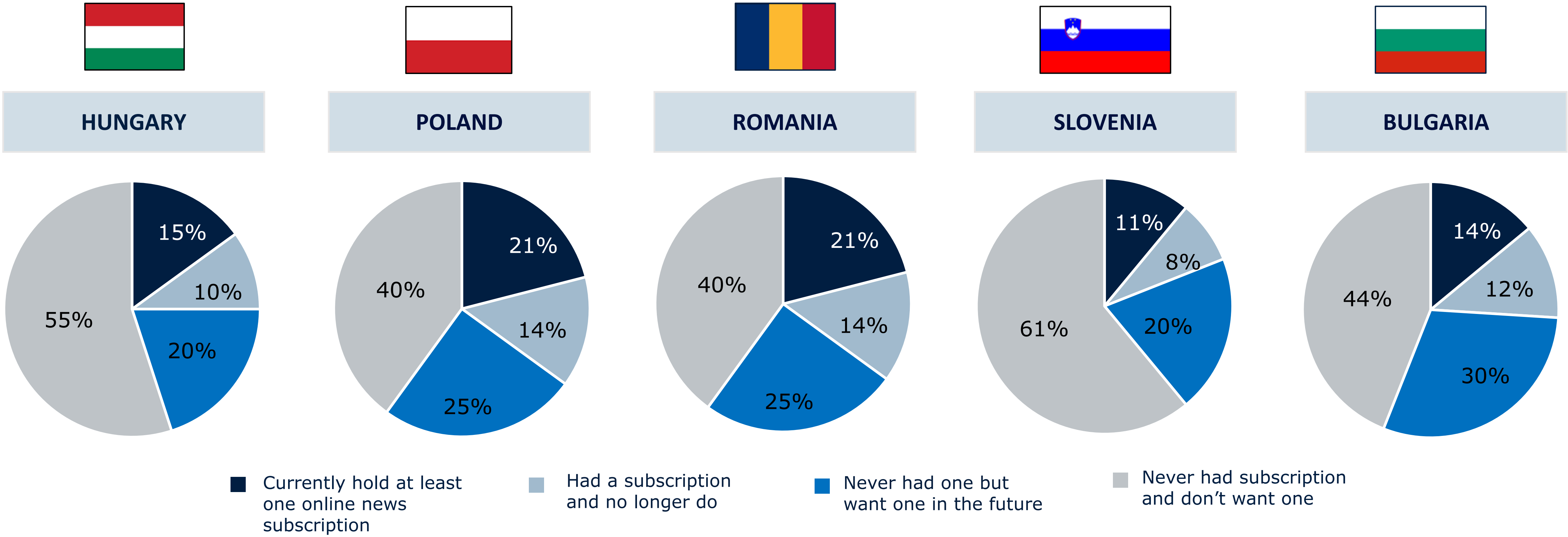
Current media exposure and engagement

**Willingness to pay for media and preferred content**

Trust in the media and desired content

Attitudes towards the media

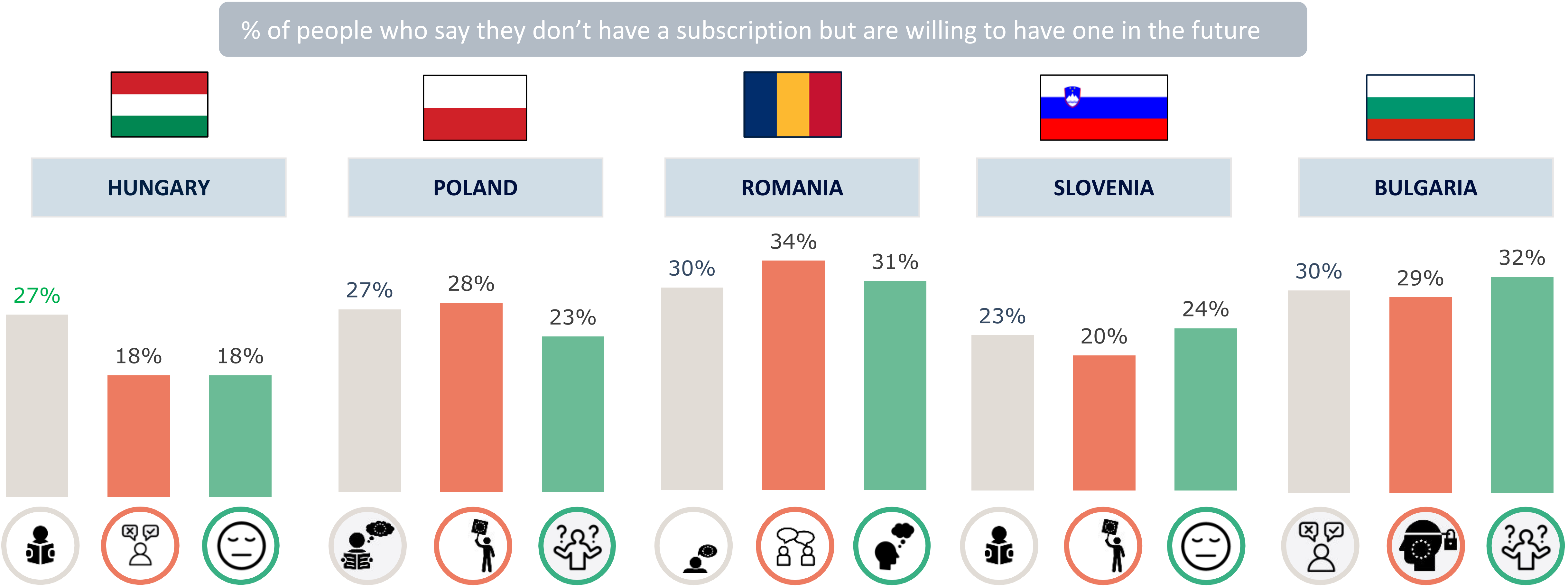
# Across countries, a segment of people that currently do not own a paid subscription to online content claim they are willing to have one in the future




*NB: Although specified in the questionnaire, we believe numbers may be inflated by people reporting on entertainment subscriptions in addition to news (i.e. Netflix, Spotify etc.)*


Q14. Which of the following statements best describes your willingness to pay for content from online news sources? Base: All Hungary (2017), All Poland (2017), All Romania (2012), All Slovenia (2034), All Bulgaria (2066)

# Specifically among target audiences, roughly one-quarter say they are open to paying for an online news subscription




*NB: Although specified in the questionnaire, we believe numbers may be inflated by people reporting on entertainment subscriptions in addition to news (i.e. Netflix, Spotify etc.)*

Text in green is statistically higher than average; text in red is statistically lower

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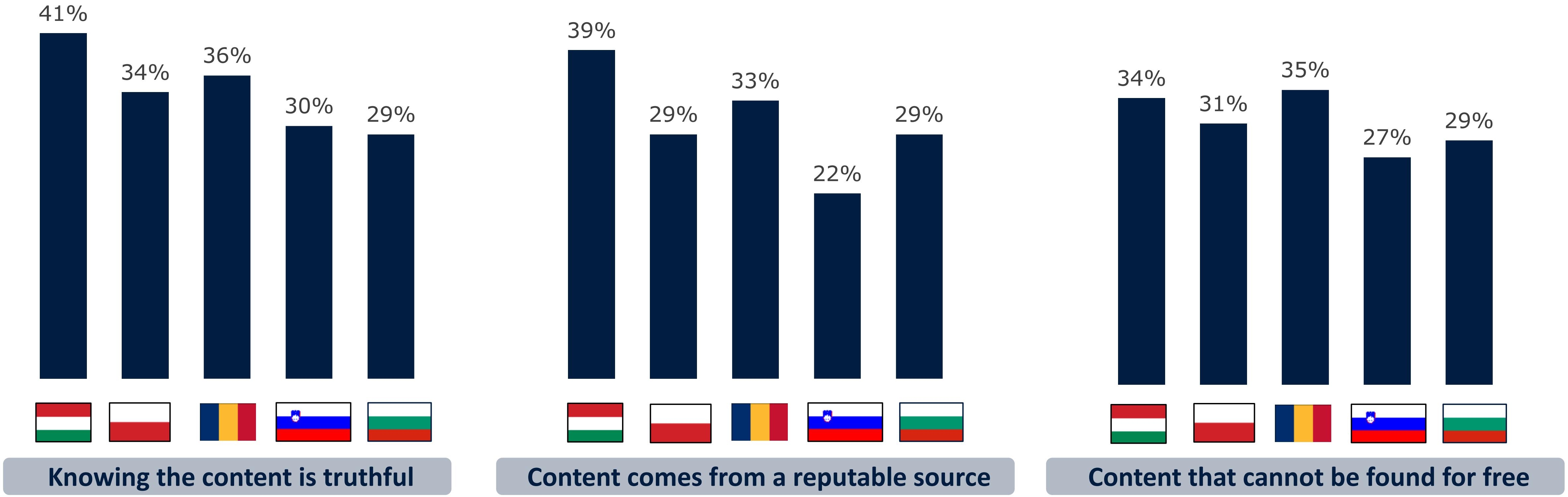
Q14. Which of the following statements best describes your willingness to pay for content from online news sources? Base: All Hungary (2017), All Poland (2017), All Romania (2012), All Slovenia (2034), All Bulgaria (2066). Base sizes for each individual cluster varies depending on the country

# Among general audiences that are currently not paying, knowing content is truthful, having a reputable source, and accessing unique content increase willingness to pay

Top 3 factors that would increase people's willingness to pay for online news content




Q15. To what extent, if at all, would each of the following affect your willingness to pay for content from online news sources? Base: All those that currently do not hold a paid subscription to an online news source. Hungary (1717), Poland (1593), Romania (1742), Slovenia (1818), Bulgaria (1767)

# To drive media payment, independent media should focus on building trust

# We then looked into audiences’ levels of trust in media, as well as their preferred content topics and formats

Identifying target audiences

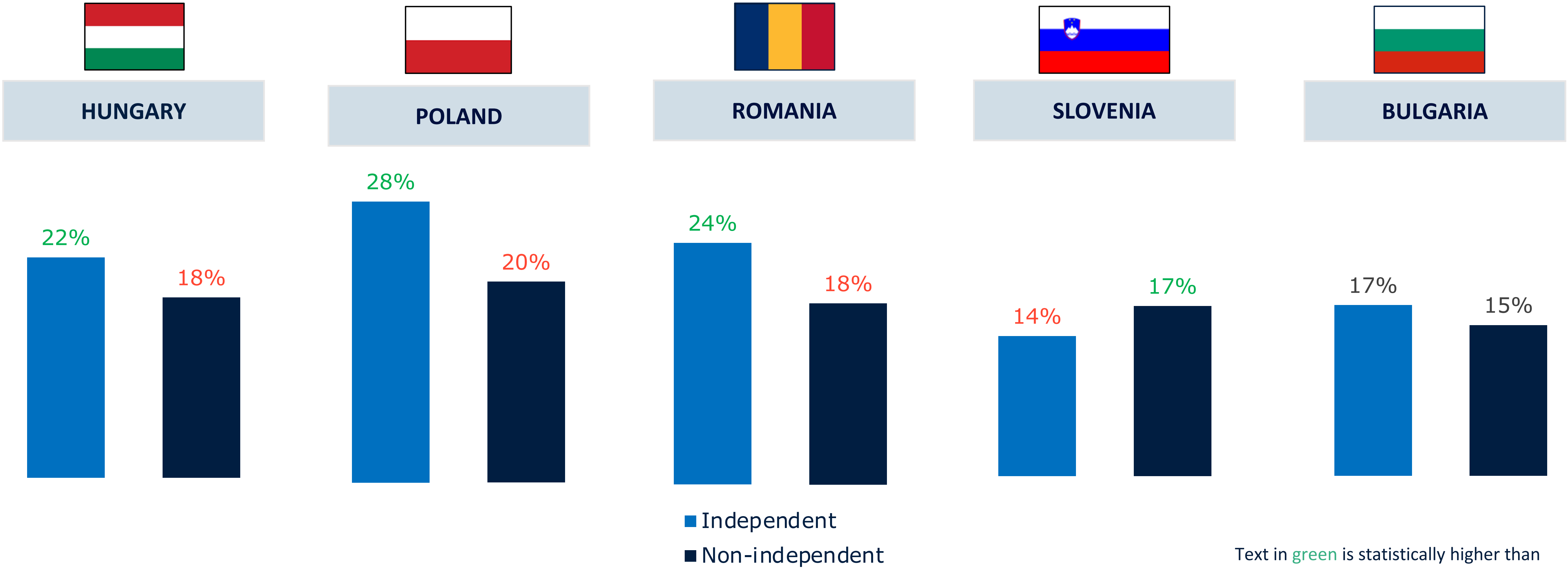
Current media exposure and engagement

Willingness to pay for media and preferred content

**Trust in the media and desired content**

Attitudes towards the media

# Although generally low, independent media seem to be more associated with trust than non-independent outlets, with the exception of Slovenia




Text in green is statistically higher than average; text in red is statistically lower

Q12. Which of these attributes do you associate with these online news outlets? I trust this outlet. Base: Those who use each outlet at least multiple times per week + randomisation; Base sizes vary per outlet

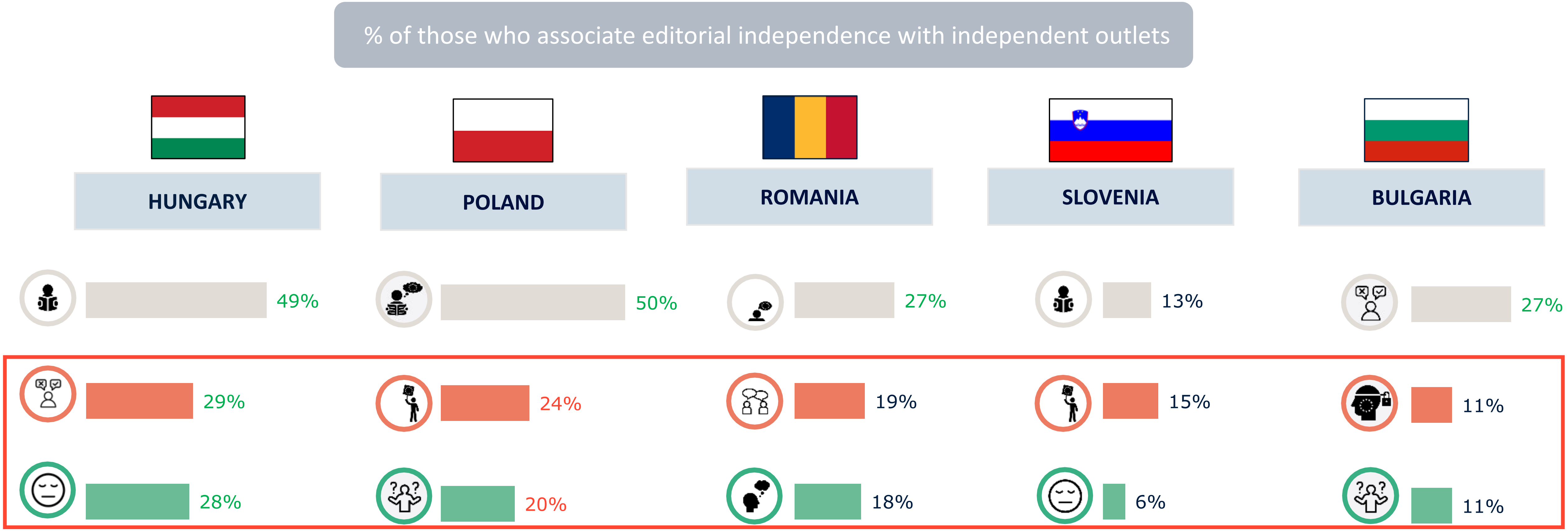
# Across all 5 countries, besides honest reporting, *independence from the government* is a key driver for building trust among audiences

Top drivers of trust for media organisations

| HUNGARY | POLAND | ROMANIA | SLOVENIA | BULGARIA |
|---|---|---|---|---|
| 1. Honest Reporting (52%)<br>**2. Independence from the government (46%)**<br>3. Criticising all sides equally (45%) | 1. Honest Reporting (57%)<br>**2. Independence from the government (56%)**<br>3. Giving equal weight to men and women (54%) | 1. Honest Reporting (73%)<br>2. Acting in society's best interest (69%)<br>**3. Independence from the government (69%)** | 1. Honest Reporting (53%)<br>**2. Independence from the government (51%)**<br>3. Acting in society's best interest (47%) | **1. Independence from the government (56%)**<br>2. Honest Reporting (56%)<br>3. Holding powerful people to account (54%) |

Q21. On a scale of zero to ten, how important are each of the following to you when deciding if an organisation is trustworthy? Base All Hungary (2017), All Poland (2017), All Romania (2012), All Slovenia (2034), All Bulgaria (2066)

# However, it seems like independent outlets can further increase impressions of independence – especially among untapped target audiences

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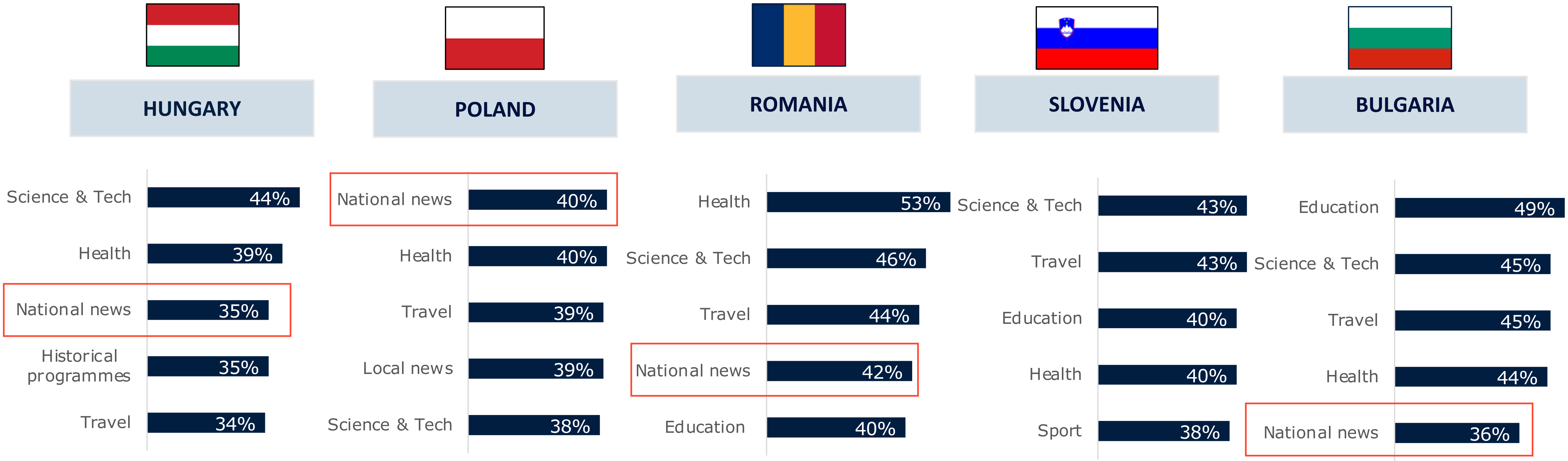
Q12. Which of these attributes do you associate with these online news outlets? They are editorially independent. Base All Hungary (2017), All Poland (2017), All Romania (2012), All Slovenia (2034), All Bulgaria (2066)

# To drive payment, independent media should consider tailoring some of their content to audiences' preferences

# Science & tech, health and travel are among the most popular topics across all countries. Regarding news specifically, *national* news is the most preferred type

Top 5 most interesting content topics across all media types

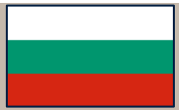



Q1. What types of topics/content would you like to see more of in the media, be it on the radio, TV, online or in publications? Base All Hungary (2017), All Poland (2017), All Romania (2012), All Slovenia (2034), All Bulgaria (2066)

# Besides country-level popular topics, European news is also an interesting content topic for target audiences specifically

Most interesting content topics across all media types

Text in green is statistically higher than average; text in red is statistically lower

| |  |  |  |  |  |
|---|---|---|---|---|---|
| | 1. **Science & Tech (59%)**<br>2. Investigative journalism (47%)<br>3. **European news (42%)** | 1. **National news (44%)**<br>2. Travel (43%)<br>3. Health (41%) | 1. **Science & Tech (55%)**<br>2. Health (51%)<br>3. **European news (50%)** | 1. Travel (48%)<br>2. Health (47%)<br>3. **Science & Tech (45%)** | 1. **Science & Tech (59%)**<br>2. Education programmes (55%)<br>3. Historical programmes (51%) |
| | 1. **Science & Tech (47%)**<br>2. Health (37%)<br>3. Travel (37%) | 1. Health (40%)<br>2. **National news (39%)**<br>3. Sports (36%) | 1. Health (57%)<br>2. **Science & Tech (50%)**<br>3. **National news (48%)** | 1. **Science & Tech (50%)**<br>2. Travel (46%)<br>3. Education programmes (44%) | 1. Education programmes (53%)<br>2. Health (49%)<br>3. **Science & Tech (47%)** |
| | 1. **Science & Tech (46%)**<br>2. Health (40%)<br>3. Historical programmes (39%) | 1. Health (41%)<br>2. Travel (41%)<br>3. **National news (39%)** | 1. Health (53%)<br>2. Travel (45%)<br>3. **Science & Tech (43%)** | 1. Travel (41%)<br>2. **Science & Tech (39%)**<br>3. Health (39%) | 1. Health (43%)<br>2. Travel (41%)<br>3. **Science & Tech (41%)** |

Q1. What types of topics/content would you like to see more of in the media, be it on the radio, TV, online or in publications? Base All Hungary (2017), All Poland (2017), All Romania (2012), All Slovenia (2034), All Bulgaria (2066)

# Written articles and short-form video are among the most preferred format types to consume news on social media across different audiences and countries

Top 5 most popular formats for news on social media among country populations

### HUNGARY

1. **Written articles (68%)**
2. **Short-form video (48%)**
3. Pictures/photos (45%)
4. Threads/comments (41%)
5. Long-form video (13%)

### POLAND

1. **Written articles (59%)**
2. **Short-form video (49%)**
3. Threads/comments (44%)
4. Pictures/photos (36%)
1. Long-form video (13%)

### ROMANIA

1. **Written articles (68%)**
2. **Short-form video (55%)**
3. Pictures/photos (43%)
4. Threads/comments (41%)
5. Long-form video (18%)

### SLOVENIA

1. **Written articles (67%)**
2. Threads/comments (45%)
3. Pictures/photos (44%)
4. **Short-form video (44%)**
5. Long-form video (9%)

### BULGARIA

1. **Written articles (67%)**
2. **Short-form video (53%)**
3. Pictures/photos (42%)
4. Threads/comments (42%)
5. Long-form video (12%)

Q23. Thinking about news consumption on social media and messaging platforms, how do you prefer to consume news? Base All Hungary (2017), All Poland (2017), All Romania (2012), All Slovenia (2034), All Bulgaria (2066)

# Key Learnings

Identifying target audiences

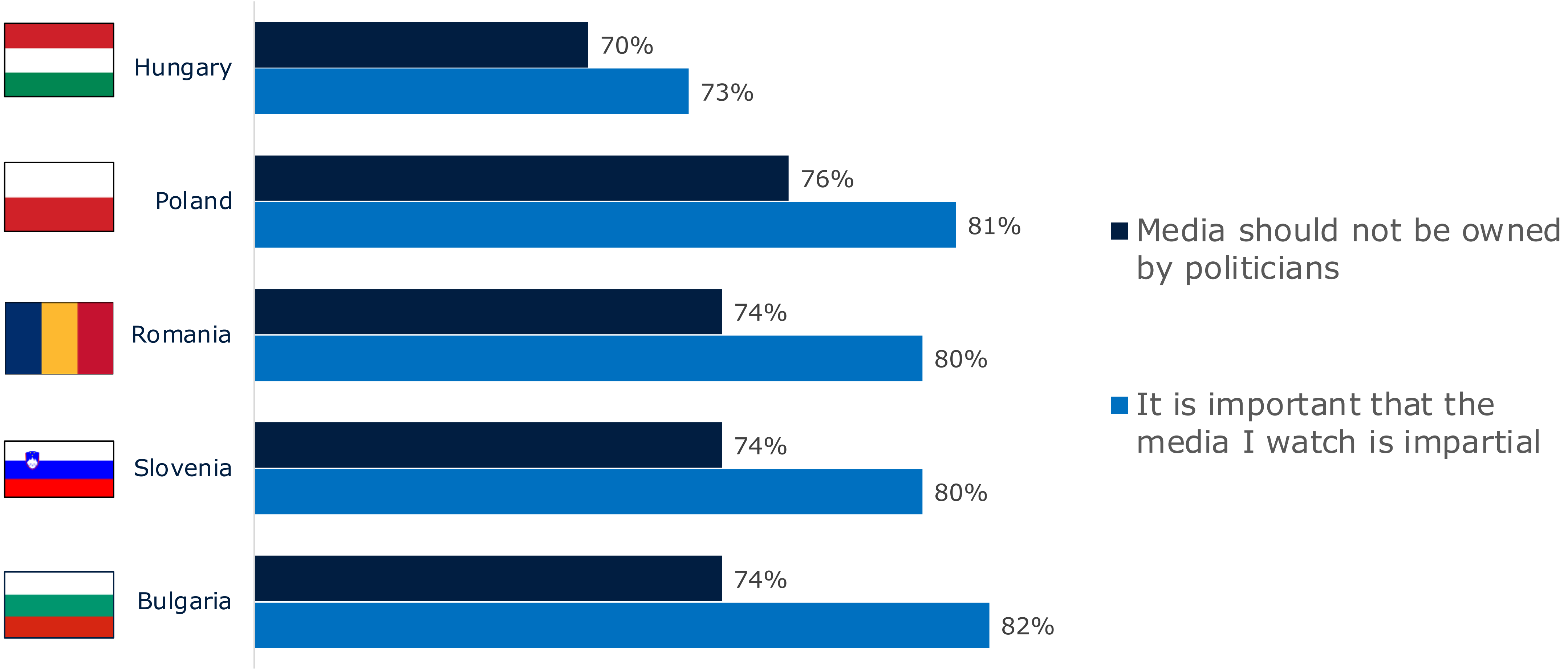
Current media exposure and engagement

Willingness to pay for media and preferred content

Trust in the media and desired content

Attitudes towards the media

# Most respondents across all groups agree that media should be impartial, and that it should not be owned by politicians

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Q24-1. To what extent do you agree or disagree with each of the following statements? Agree. It is important to me that the news I watch is impartial. AND It is not appropriate for media companies to be owned by politicians. Base All Hungary (2017), All Poland (2017), All Romania (2012), All Slovenia (2034), All Bulgaria (2066)

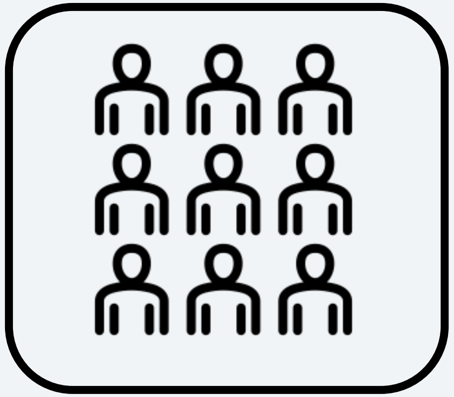
# At the same time, it seems like the same audiences are less opposed to media receiving support from abroad

It is not appropriate for media organisations in my country to have financial support from abroad

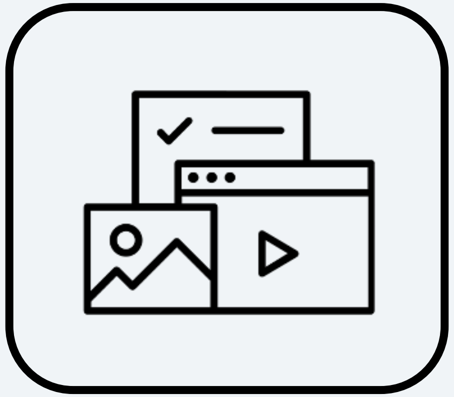
| HUNGARY | POLAND | ROMANIA | SLOVENIA | BULGARIA |
|---|---|---|---|---|
| 35% | 34% | 46% | 41% | 50% |

Q24-1. To what extent do you agree or disagree with each of the following statements? Agree. It is not appropriate for media organisations in my country to have financial support from abroad. Base All Hungary (2017), All Poland (2017), All Romania (2012), All Slovenia (2034), All Bulgaria (2066)

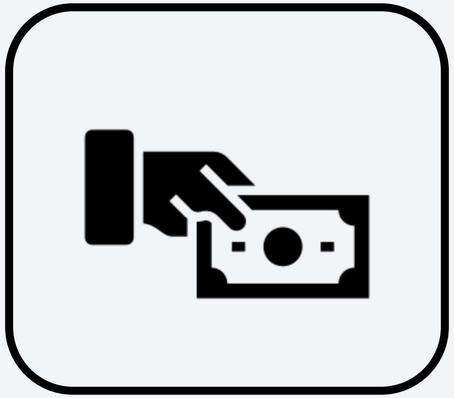
# To sum up:



Independent outlets across all countries can grow their audiences by targeting two additional segments in the population.



To reach target audiences, independent outlets should solidify their online presence and explore alternative platforms such as streaming and podcasts –to engage younger subgroups especially.



To drive reader revenue, independent outlets can for example target audiences that say they're willing to pay for an online news subscription. To drive payment, outlets should build trust and deliver unique content.

To increase trust, independent outlets should reinforce target audiences' perceptions of editorial independence. They could also report on interesting topics including science & tech and health.

Most people across countries claim they want for media to be independent and not owned by politicians. Independent outlets can leverage this and focus on communicating their independence further.

Audiences across the region already want independent media.

Independent outlets just need to find them and engage them.

This study was made possible by the support of the American people through the United States Agency for International Development (USAID).

The contents of this report are the sole responsibility of Zinc Network and do not necessarily reflect the views of USAID or the United States Government.