ZINC NETWORK

Media consumption in Bulgaria

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

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Contents

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01 Methodology

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Methodology in detail

Online Methodology

Online quantitative survey
40 questions in total

Representative of Bulgaria

Sampled and weighted to be representative of Bulgaria by **age, gender, region** in line with census data. Weighting efficiency is 97.71 %

Fieldwork in early 2023

27th February – 13th March 2023

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Research Questions

1

How do different population segments currently **engage with media** in Bulgaria?

2

Which groups are currently **target audiences** for independent media?

Which **platforms** are they specifically engaging with?

3

What drives **media payment?**

4

What are their **attitudes towards media?**

What are their **expectations** for media and how can organisations gain their **trust?**

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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

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Sample details

- 2066 respondents in total
- Online quota sampling
- Sampled and weighted to be representative of Bulgaria by **age**, **gender**, **region** in line with census data

52% Female

48% Male

23% 18-34 years old

47% 35-54 years old

30% 55+ years old

30% Live in Southwestern Bulgaria (Sofia region)

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Cluster methodology

Clustering Methodology	We conducted a k-means cluster analysis using 5 continuous variables, selected based on prior research and local expertise	
Key Variables	***Political Views***	**Response type**
	Bulgaria should **accelerate/reverse** its integration with the EU	Scale 1-7 (1=accelerate;7=reverse)
	It is best to have **strong leader** who can take decisions without interference from parliament/**strong parliament** to hold government to account	Scale 1-7 (1=strong leader;7=strong parliament)
	Influence on the media in Bulgaria	
	The Bulgarian government has a **positive/negative** influence on the media in Bulgaria	Scale 1-5 (1= Very positive;5=Very negative)
	The EU has a **positive/negative** influence on the media in Bulgaria	Scale 1-5 (1= Very positive;5=Very negative)
	Cognitive Openness*	
	“Truth” is just what someone chooses to believe	Scale 1-5 (1=strongly disagree;5=strongly agree)

*Understanding the Cognitive Openness of a cluster is crucial for identifying whether that group is willing to consider alternative viewpoints. Groups who believe themselves to be better informed than others, or think that truth is relative, are less likely to accept views that contradict their own.

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Preliminary notes

- All numbers are percentages unless otherwise stated. Numbers may not sum to 100 due to rounding; Percentages are based on the weighted totals.
- When we use the term *independent*, this comprises both commercial and Public Service Broadcasters (PSB), as classified by Zinc Network based on ownership.
- Outlets that have explicit state ownership have been labelled as State-owned
- The survey was carried out in early 2023 so all findings reported need to be contextualised within that timeframe, and we are aware that responses are susceptive to timely events.

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02 Key findings

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What we've learned

1. **We have identified 5 clusters which differ based on their cognitive openness, attitudes towards international politics and their relationship with media:** Within those 5 clusters we have identified 3 target audiences who are more likely to be receptive of independent media. They are all more likely to trust independent media outlets; two of our target groups want to consume content that independent media produce, while the third of the target groups is cognitively open and willing to pay for content.

2. **Bulgarians are more aware of non-independent media:** The media landscape in Bulgaria is dominated by non-independent or state outlets. As a result, exposure to non-independent media organisations is higher across all groups, compared to independent outlets.

3. **Independent outlets perform better overall on key trust drivers:** Independent outlet Bivol.bg in particular performs well on the most important trust drivers, compared to tested independent and non-independent outlets. Bulgarians are more likely to trust media with values that align with independent outlets, including honest reporting and political or financial independence.

4. **Independent media should tap into disillusionment:** Bulgarians show low trust in media, with nearly 1 in 2 Bulgarians stating that they don't believe their views are reflected in the media. Bulgarians' distrust in current media gives less well-known independent media brands the opportunity to connect with new audiences and instil trust by meeting their expectations for content and values.

5. **Specific factors and content type could drive media payment among Bulgarians:** While most Bulgarians don't currently hold an online news subscription, nearly 1 in 3 claim that they are open to having one in the future. Key factors driving media payment include anti-disinformation activity, truthful content and a reputable source. Independent media in Bulgaria should emphasise these attributes to boost audience engagement. Furthermore, two of our target clusters would like to see more content on investigative journalism and national news. Independent media outlets should raise the profile of this type of content on their platforms to engage our target clusters.

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03 Clusters in detail

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Our 5 groups in a nutshell

Less open to independent media → More open to independent media

17%	29%	24%	18%	12%
Disengaged Conservatives	**Informed Conservatives**	**Open-minded Centrists**	**Closed-minded Liberals**	**Discerning Liberals**
Youngest of the groups but mostly middle-aged	Mostly Middle-aged	Mostly Middle-aged	Middle-aged and Older	Middle-aged and Older
Equal Gender Split	Mostly Female	Equal Gender Split	Equal Gender Split	Mostly Male
Lower Education level	Mid education level	Lowest Education level	High Education level	Highest Education level
Lowest Income	Moderate Income	Moderate Income	Higher Income	Highest Income
Identifies with being Bulgarian more than anything else	Identifies with being Bulgarian more than anything else	Identifies with being Bulgarian, but less than others	Most likely to identify with being Bulgarian, European and those sharing political ideals	Identifies with being Bulgarian, also strongly identifies as European
Against EU integration	Against EU integration	Pro-EU integration	Pro-EU integration	Pro-EU integration
Socially Conservative	Socially Conservative	Socially Moderate	Socially Conservative	Socially Liberal
Nearly all view government influence on media as negative	Most view government influence on media as negative	Half view government influence on media as negative	Half view government influence on media as negative	Most view government influence on media as negative
Cognitively Closed-off	Cognitively Closed-off	Cognitively Open	Cognitively Closed-off	Cognitively more open

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Based on their current relationship with the media and their cognitive openness, we have identified three clusters as targets for independent media

	High exposure to non-independent	Awareness of online news outlets	Engagement with online news outlets	Trust in media	View on media impartiality	% Willing to pay for independent media
Disengaged Conservatives (17%)	78%	**Higher awareness of non-independent** than independent	Higher engagement for non-independent	Low trust overall but **slightly higher trust** for **independent**	More likely to believe that media criticism of the government causes instability. Against foreign ownership of media companies	41%
Informed Conservatives (29%)	74%	**Higher awareness of non-independent** than independent	Higher engagement for non-independent	Low trust overall but **slightly higher trust** for **independent**	Most likely to oppose foreign ownership of media companies More likely to believe that media criticism causes instability	43%
Open-minded Centrists (24%)	77%	**Lowest awareness for all outlets**	Higher engagement for non-independent	Low trust overall **Similar levels of trust** for **independent and non-independent**	Uncertain on media impartiality, foreign support or ownership by politicians More likely to think that media should respect the authorities	51%
Closed-minded Liberals (18%)	73%	**Higher awareness of non-independent** than independent	Higher engagement for independent than other groups	**Higher trust for independent** Dnevnik the most trusted	Strongly believes in media impartiality and independent ownership, but that media should respect the authorities	42%
Discerning Liberals (12%)	68%	**Highest awareness for independent** and similar levels for independent and non	**Highest engagement of independent**	**Highest trust for independent** Bivol the most trusted	Strongly believes media should not be owned by politicians More likely to think media should not respect the authorities	44%

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However, each cluster falls somewhere along a continuum in its attitude toward independent media and will need its own specific engagement strategy

Less open to independent media → More open to independent media

Disengaged Conservatives	Informed Conservatives	Open-minded Centrists	Closed-minded Liberals	Discerning Liberals
17%	29%	24%	18%	12%

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04

Findings in detail

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Deep dive 1: Current media consumption

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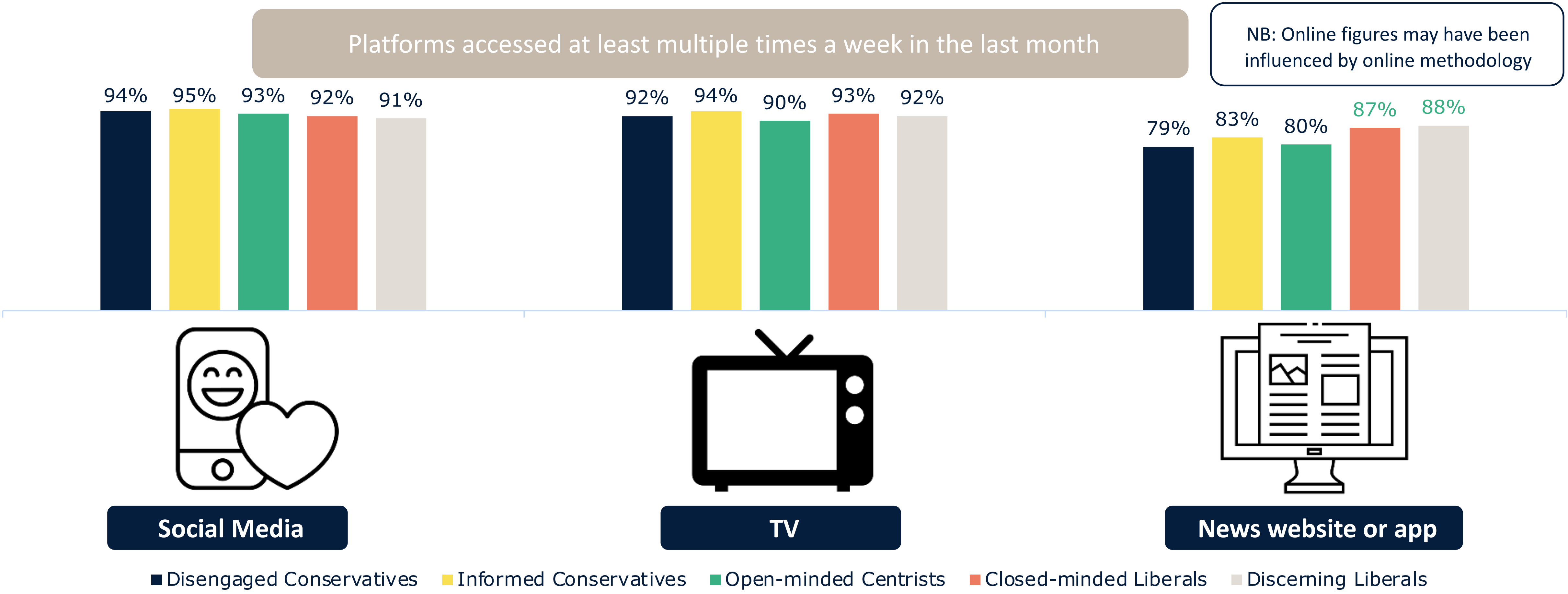
Overall, social media and TV are the most popular platforms, while news sites/apps are most used by target groups….



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

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 (2066), Disengaged Conservatives (375), Informed Conservatives (589), Open-minded Centrists (498), Closed-minded Liberals (362), Discerning Liberals (242)

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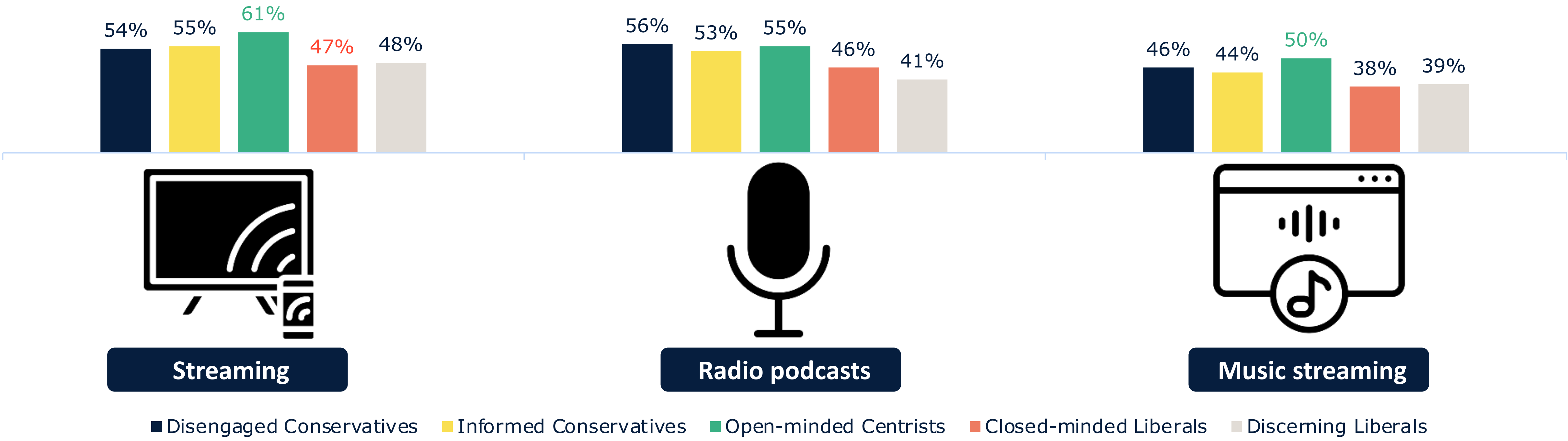
While less popular among Bulgarians overall, streaming sites and podcasts appeal most to Open-minded Centrists

Platforms accessed at least multiple times a week in the last month

NB: Online figures may have been influenced by online methodology



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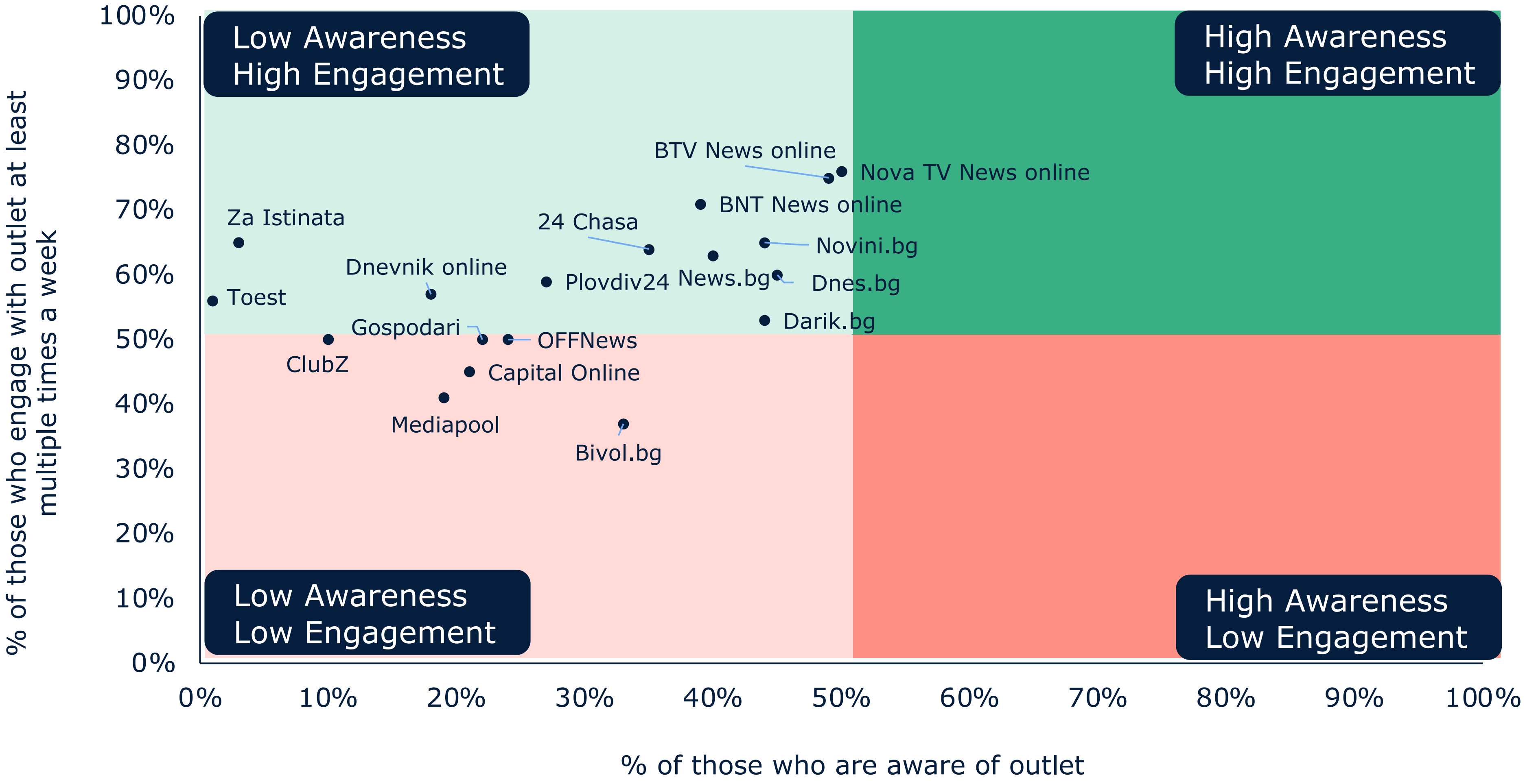
Independent outlets have an opportunity to increase both awareness and engagement levels in Bulgaria



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.

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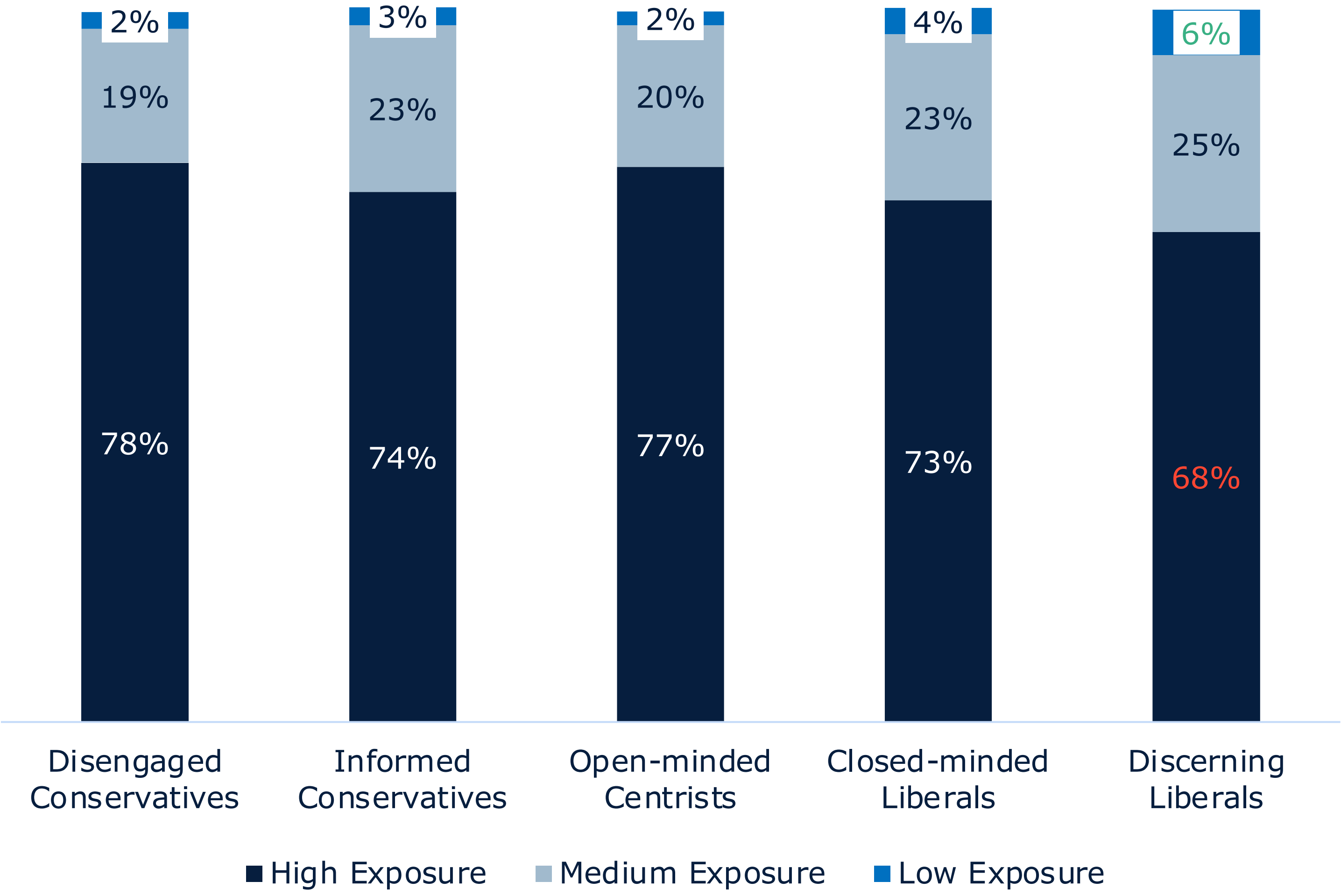
Most Bulgarians across all groups are currently highly exposed to non-independent media



75%

Of all Bulgarians are highly exposed to non-independent media, both on TV and online

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Q4+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)

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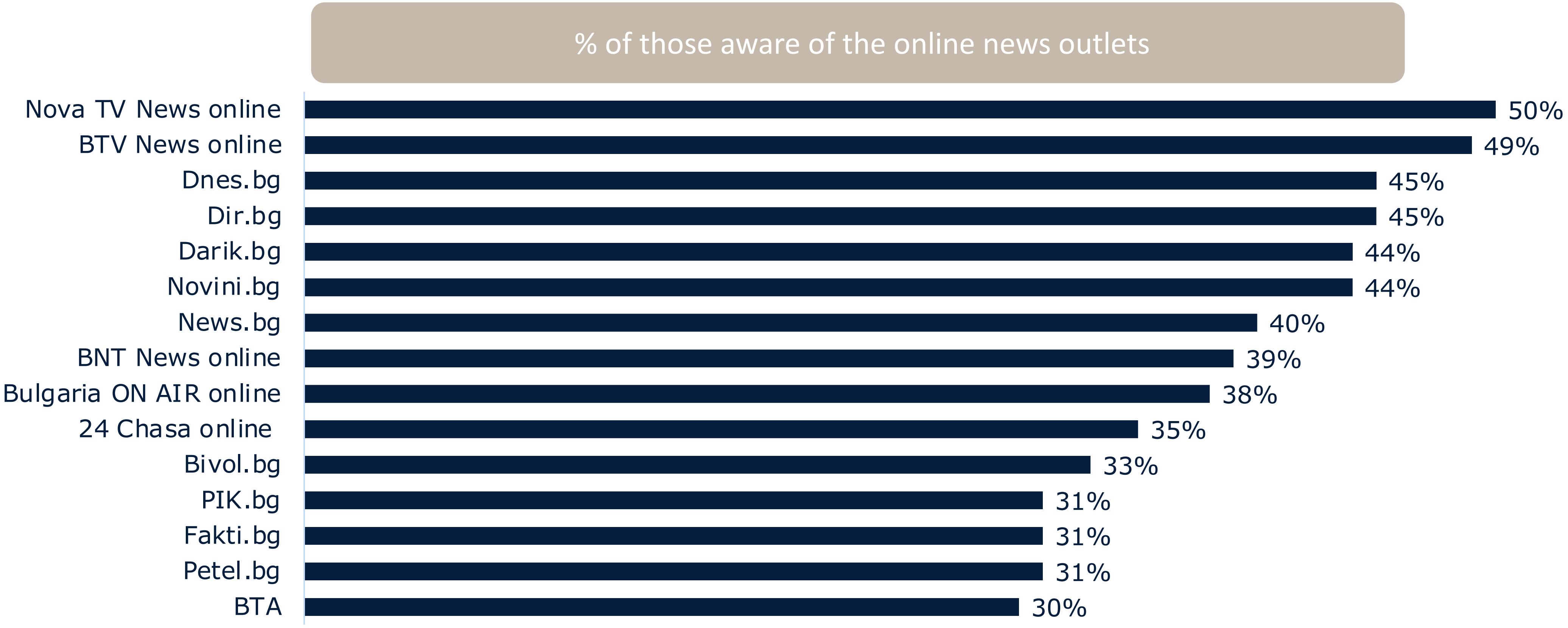
Awareness of independent news outlets is low across the clusters



Q7. Here is a list of online news outlets. Which of these are you aware of? Base: All (2066), Disengaged Conservatives (375), Informed Conservatives (589), Open-minded Centrists (498), Closed-minded Liberals (362), Discerning Liberals (242)

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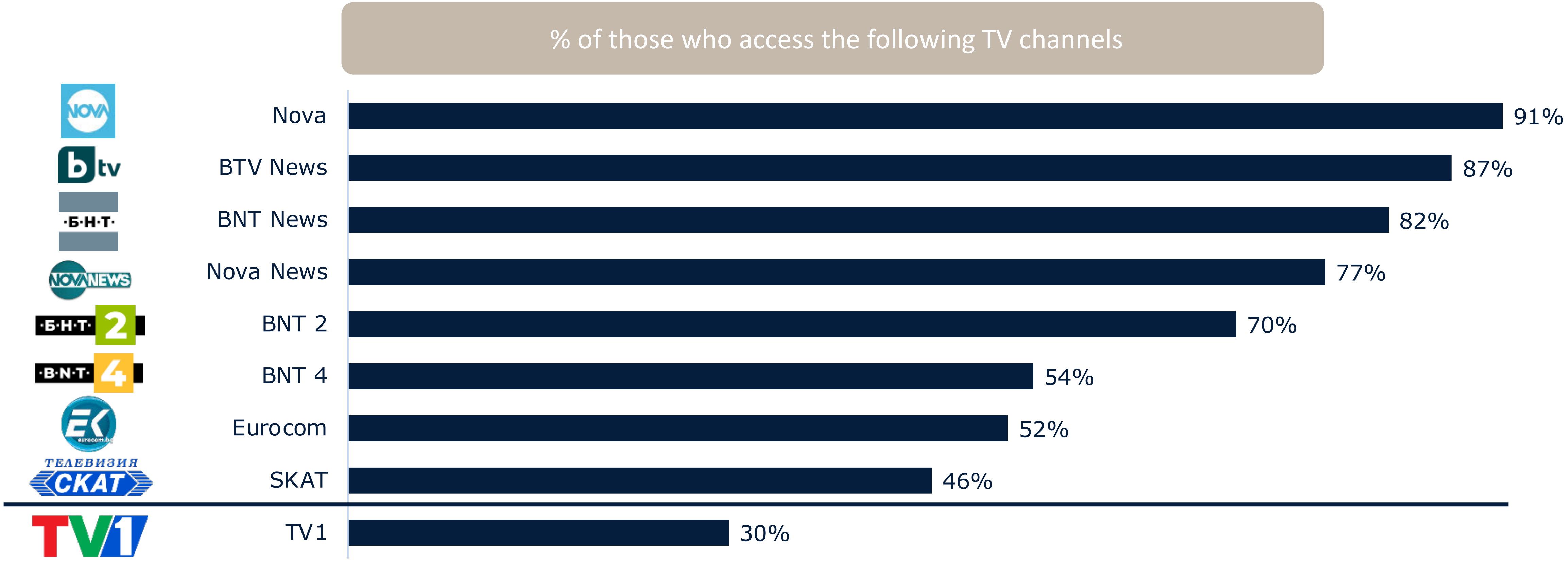
Independent TV1 ranks lowest on awareness compared with other channels.



Q3. Here is a list of TV channels, which of these TV channels do you access? Base: All (2033), Disengaged Conservatives (370), Informed Conservatives (582), Open-minded Centrists (490), Closed-minded Liberals (355), Discerning Liberals (236)

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Similarly, engagement for TV1 is the lowest compared with all tested channels. This holds true for all Bulgarian clusters.

Of those aware: % that access channel at least multiple times a week

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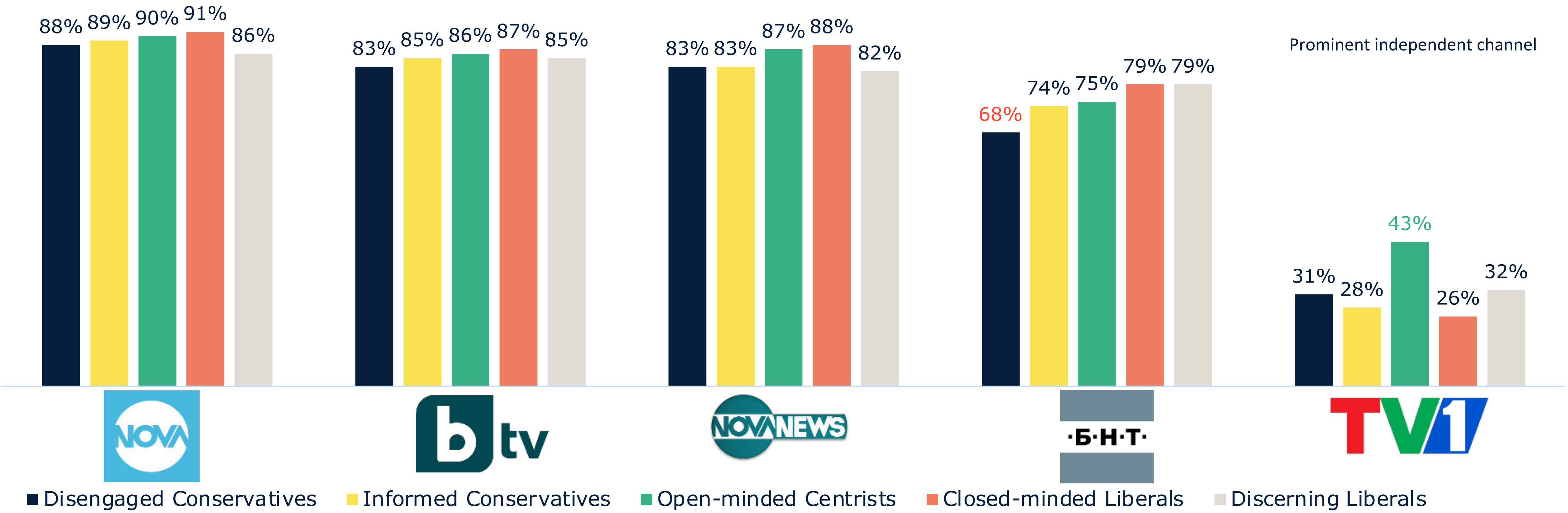

Q4. Typically how frequently do you watch these TV channels? Base: Varies by TV channel

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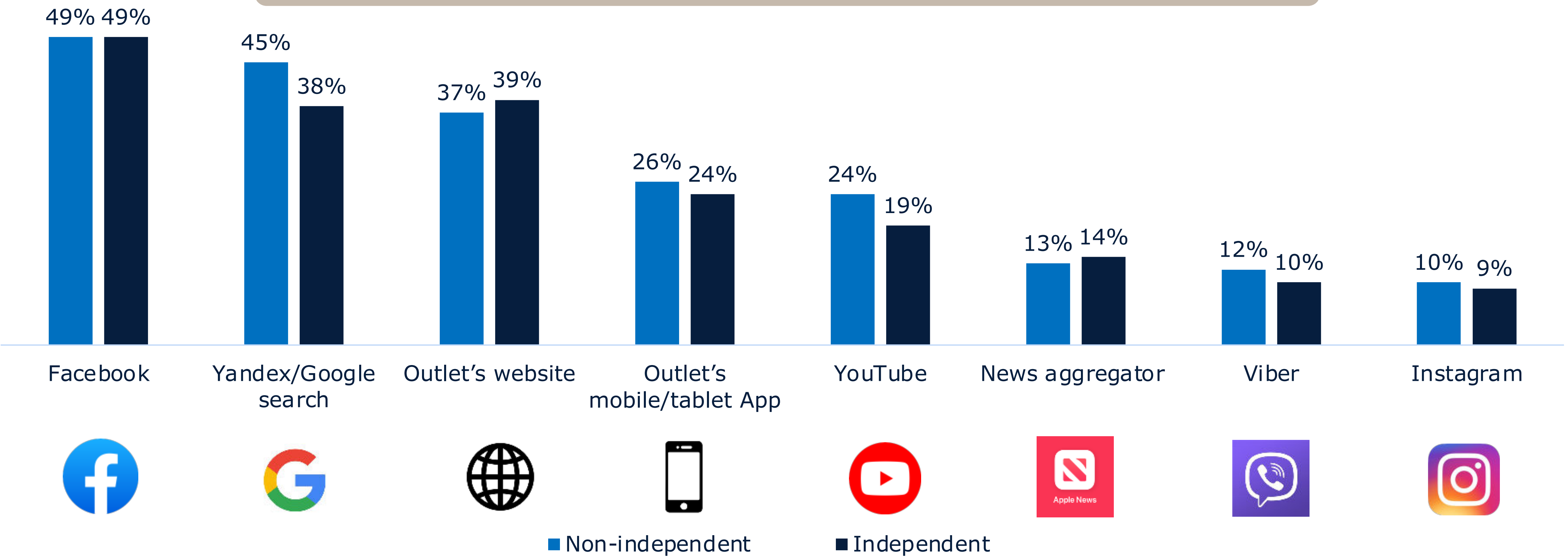
Bulgarians use similar platforms to access both independent and non-independent media

Platforms used to access outlets at least multiple times a week



Q11. Thinking more about the online news outlets you use at least multiple times a week, which of the following do you commonly use to access them? Base: Varies by outlet

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Deep dive 2: Willingness to pay for media

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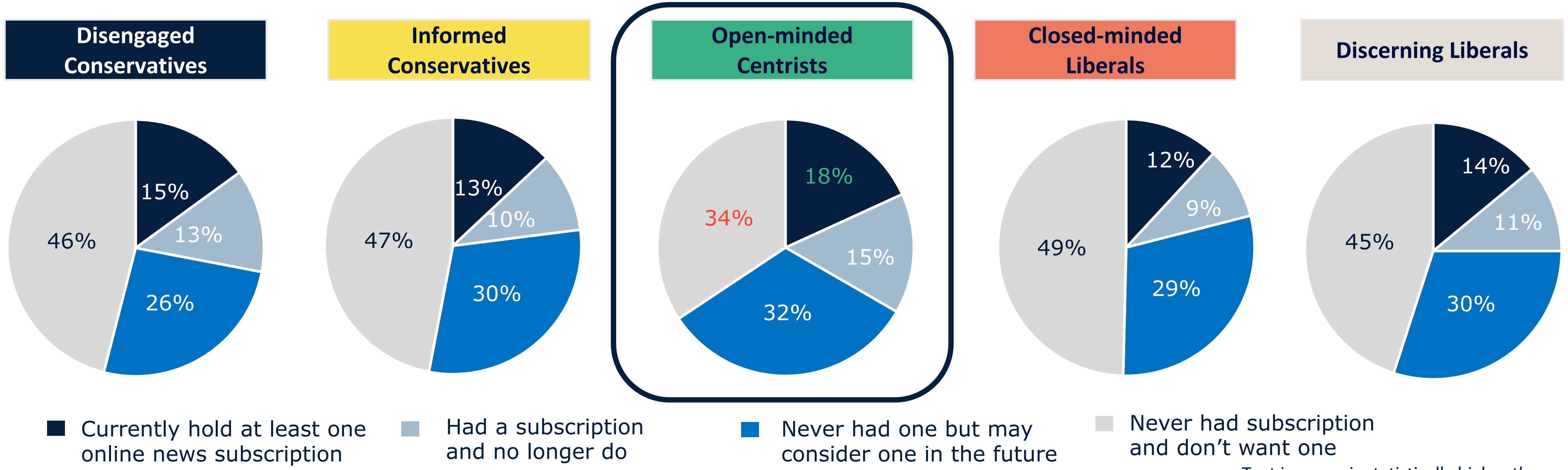
Although few Bulgarians currently hold an online news subscription, nearly 1 in 3 may get one in the future. This is especially true for the Open-minded Centrists

Willingness to pay for online content



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Q14. Which of the following statements best describes your willingness to pay for content from online news sources? Base: All (2066), Disengaged Conservatives (375), Informed Conservatives (589), Open-minded Centrists (498), Closed-minded Liberals (362), Discerning Liberals (242)

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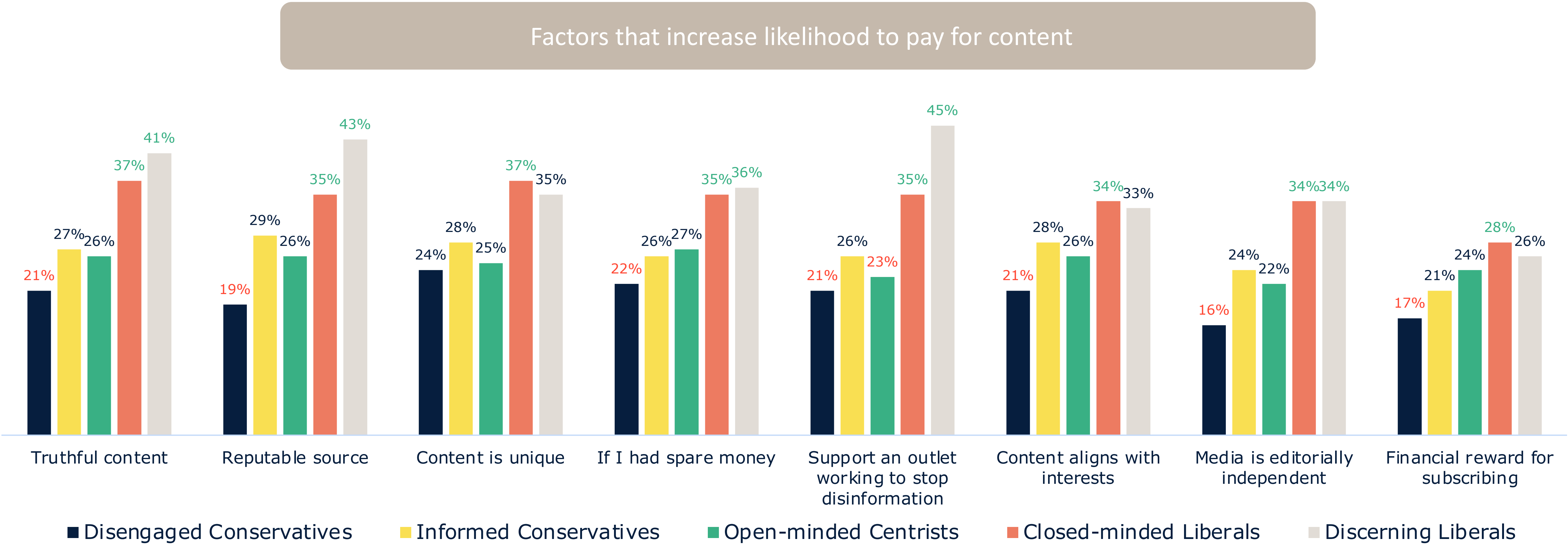
Two of our target groups in particular are looking for truthful content, a reputable source, and anti-disinformation work in particular



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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 (1765), Disengaged Conservatives (318), Informed Conservatives (512), Open-minded Centrists (408), Closed-minded Liberals (318), Discerning Liberals (209)

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Deep dive 3: Trust

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Measuring organisational trust

To properly contextualise trust, Zinc Network plots familiarity against the trust/salience score. The trust/salience score is calculated by weighting an organisation's performance on each trust driver according to the importance of that driver in forming trust, and then averaging performance across all the drivers. This ensures that an organisation's trust performance is not flattered by strong performance on drivers that are unimportant in forming trust.

A high degree of familiarity combined with a high trust/salience score (e.g. in the top right of the following quadrants) indicate an organisation that is very well known and very well trusted, and that is likely to have a high degree of reputational resilience and credibility as a messenger.

By contrast, a high degree of familiarity combined with a low trust/salience score (e.g. in the top left of the following quadrants) suggests an organisation that is poorly perceived by those who know it. These organisations will struggle to build trust unless they understand what trust drivers to focus on – the better known an organisation is, the harder it becomes to change minds.

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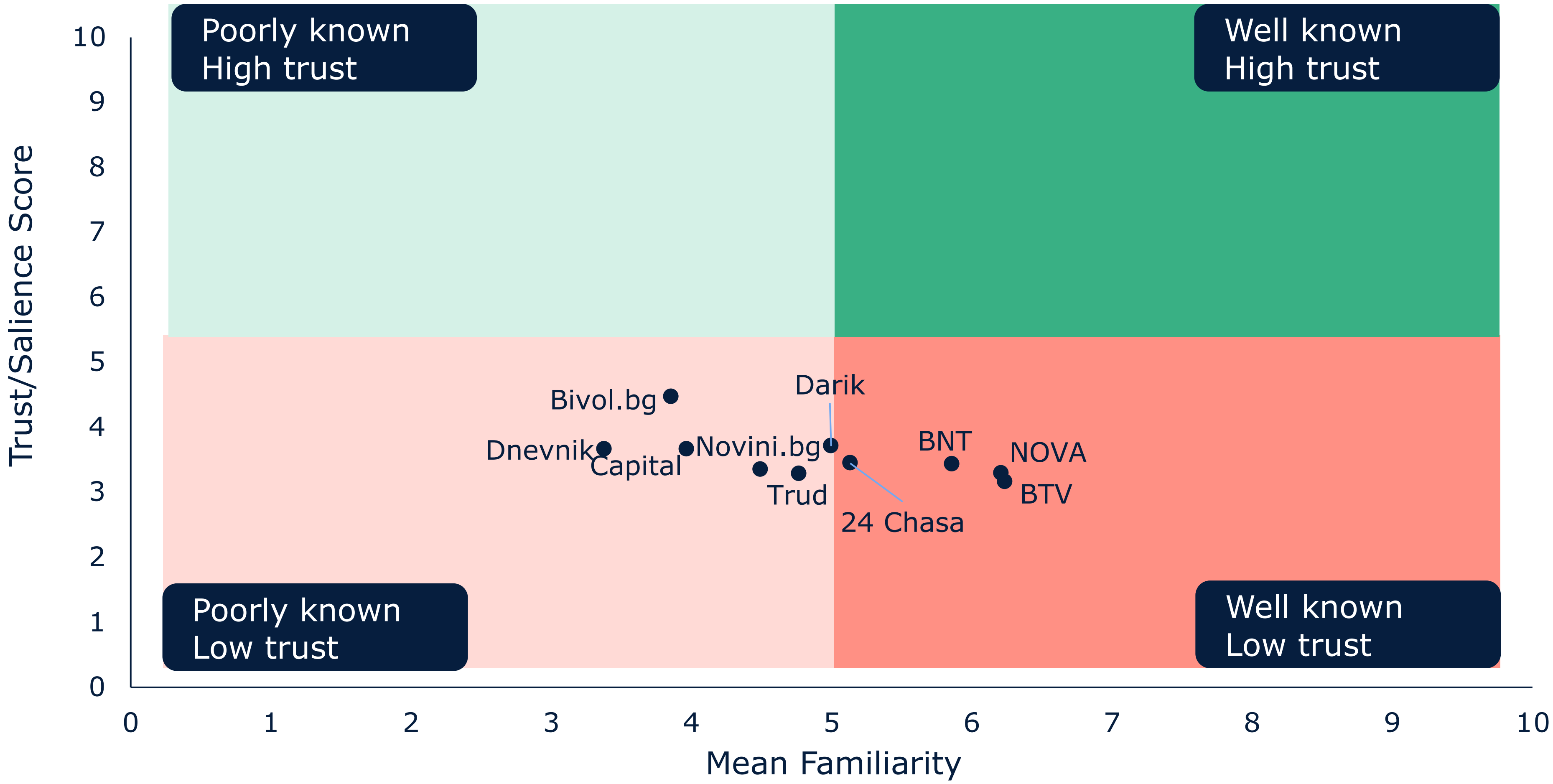
Overall trust in media is low in Bulgaria, with outlets BTV, NOVA and BNT particularly struggling to convert familiarity into trust



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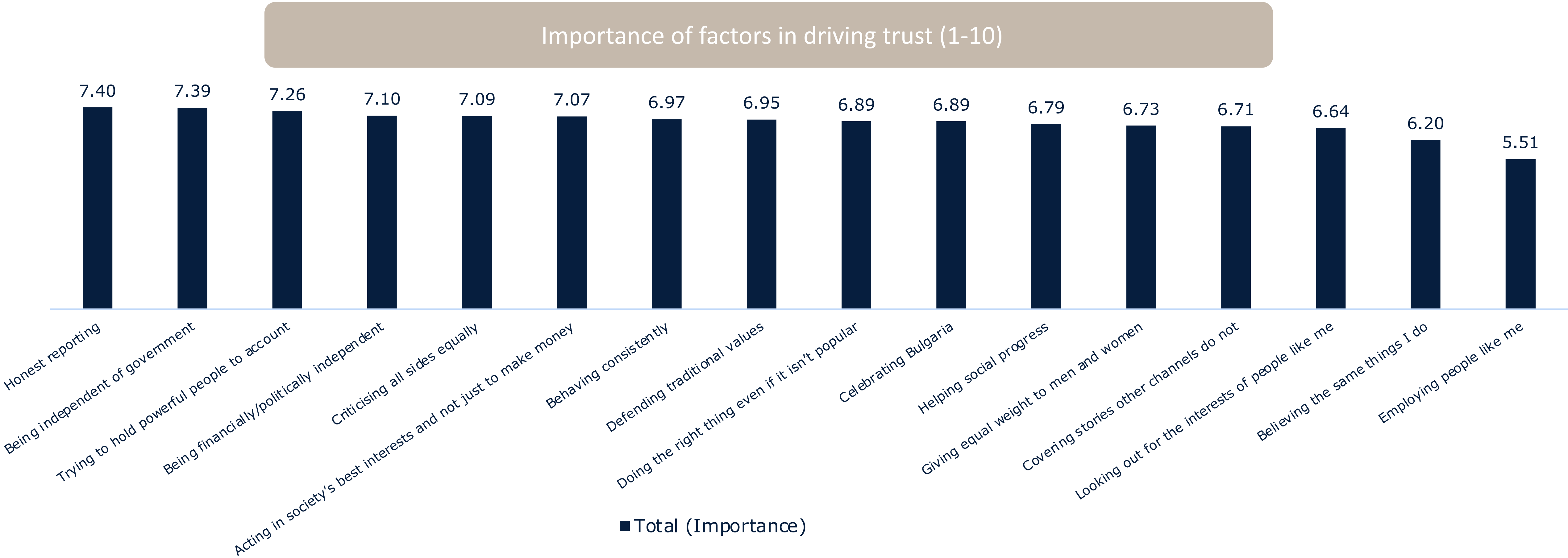
Honest reporting, independence from the government, and holding powerful people to account are key drivers of trust in Bulgaria



Q21. On a scale of zero to ten, how important are each of the following to you when deciding if an organisation is trustworthy? Q.20 And how would you rate the performance of [insert outlet] on each of the following? Base: Varies by outlet

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Deep dive 4: What content do people want?

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Education programmes and science and technology are the most favoured content topics across groups

Top 5 content types each group wants more of

1. **Education programmes** (52%)
2. Comedy shows (47%)
3. **Science & tech** (44%)
4. Travel (42%)
5. Health (42%)

1. **Education programmes** (50%)
2. Travel (46%)
3. Health (44%)
4. Historical programmes (43%)
5. **Science & tech** (42%)

1. Health (43%)
2. Comedy shows (42%)
3. **Education programmes** (41%)
4. **Science & tech** (41%)
5. Travel (41%)

1. **Education programmes** (53%)
2. Health (49%)
3. **Science & tech** (47%)
4. National news (46%)
5. Travel (45%)

1. **Science & tech** (59%)
2. **Education programmes** (55%)
3. Travel (51%)
4. Historical programmes (51%)
5. Investigative journalism (50%)

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

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 (2066), Disengaged Conservatives (375), Informed Conservatives (589), Open-minded Centrists (498), Closed-minded Liberals (362), Discerning Liberals (242)

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Deep dive 5: Attitudes towards media

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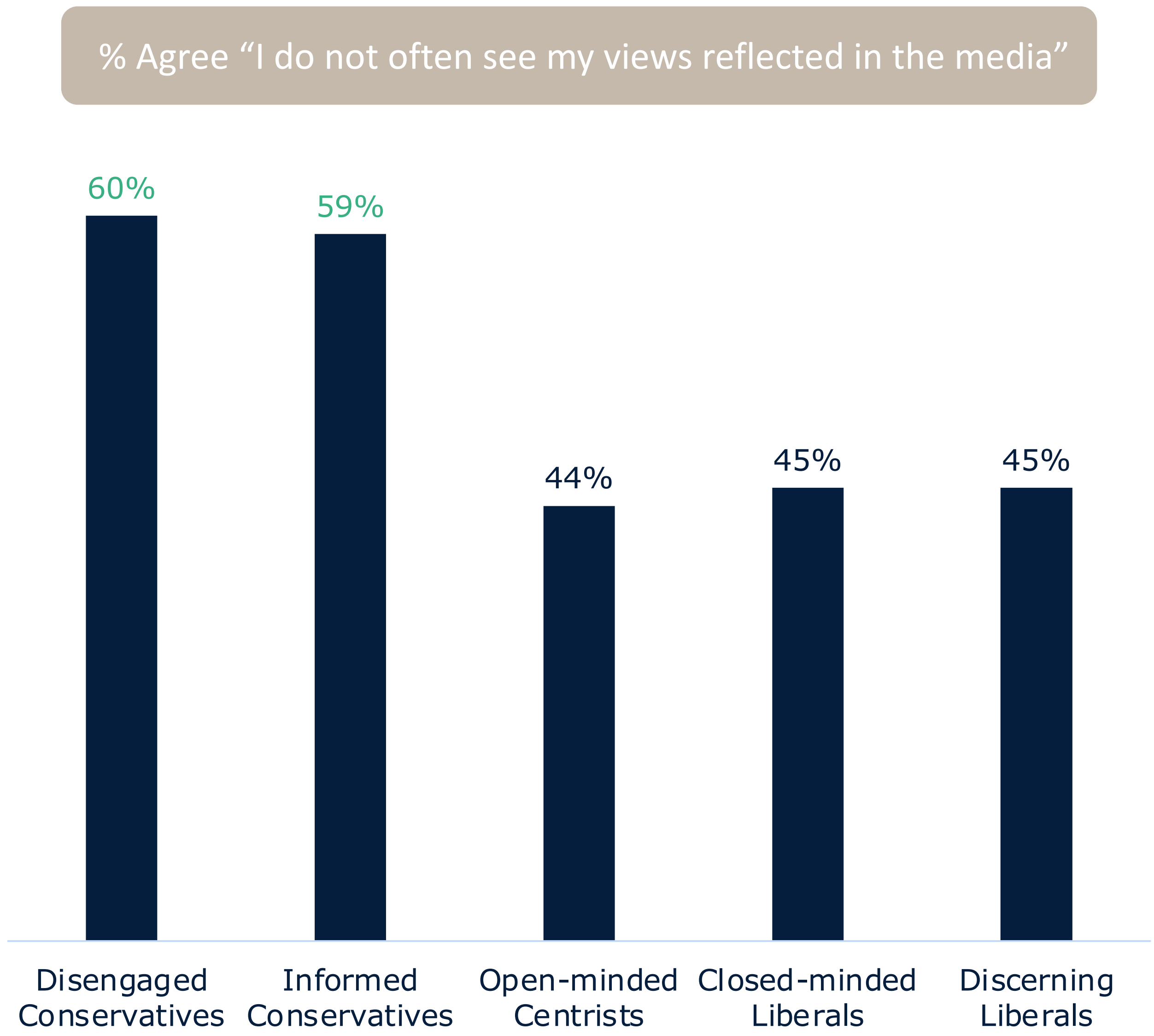
1 in 2 Bulgarians overall don’t believe their views are often reflected in the media



Q24_4. To what extent do you agree/disagree with the following statements? Agree I do not often see my views reflected in the media : All (2017), Disengaged Conservatives (375), Informed Conservatives (589), Open-minded Centrists (498), Closed-minded Liberals (362), Discerning Liberals (242)

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Most Bulgarians think that media impartiality is important to them, especially two of our target clusters

% Agree "It is important that the news I watch is impartial"

Disengaged Conservatives	Informed Conservatives	Open-minded Centrists	Closed-minded Liberals	Discerning Liberals
81%	85%	72%	91%	89%

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

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. Base: All (2066), Disengaged Conservatives (375), Informed Conservatives (589), Open-minded Centrists (498), Closed-minded Liberals (362), Discerning Liberals (242)

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05 Appendix

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Discerning Liberals: Full profile

Key Demographics

This is the smallest cluster (12% of total participants). This cluster is well-educated, with above average completion of higher education (68%). They are financially comfortable, have a high % over 55 and are either working full-time or retired, living in southwestern Bulgaria.

Political orientation

They are the most pro-EU and pro-USA group. They strongly support closer integration with the EU, identify as being European above all other identifiers and are disproportionately likely to speak English as well as Bulgarian.

Cognitive Openness

This cluster recognises objective truth. They think that they are better informed than others, making them less open to media that disagrees with their current liberal political view.

Media Exposure

This cluster shows the highest awareness, engagement and trust in independent media compared to all other groups. They are the least likely to think that criticism of the government by the media causes instability, are convinced that media companies should not be owned by politicians and believe the government has a negative influence on the media.

This cluster is disproportionately likely to speak English as well as Bulgarian

30% are open to having an online news subscription in the future

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Discerning Liberals and independent outlets

Why they matter

- This group is a key target to increase consumption of independent media. They are **the most aware, trusting and engaged group with independent media**, but still consume a lot of content from non-independent sources.
- This cluster is cognitively closed, as they believe themselves to be more informed than most. However, none of them think that truth is subjective, making them more likely to actively seek truth in what they engage with
- 30% of this group is open to pay for an online news subscription in the future, especially if they are **contributing to an outlet that is working to stop the spread of disinformation**. 40% are willing to consider a free trial for online news in future.

How to win them over

- **Reach them:** This cluster are the most frequent users of news sites or apps. Most of this cluster also watch TV and engage in social media at least multiple times a week.
- **Engage them:** This cluster is most interested in light entertainment followed by informative content (science, history, investigative journalism). They describe independent media as informative on Bulgaria and they believe content to be well produced
- **Gain their trust:** For this cluster, honest reporting, financial and political independence and a critical stance on powerful individuals are the most important factors for increasing trust.

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Closed-minded Liberals: Full profile

Key Demographics

Most respondents in this cluster are aged over 45 (63%) and compared to other clusters, this group has a higher amount of people that are retired. They have above average education and high income.

Political orientation

81% of this cluster supports further integration with the EU and they disproportionately identify with being European. They also strongly identify with being Bulgarian and being part of a group that shares their political ideals. This group holds conservative social values.

Cognitive Openness

This group is confident in their views, frequently selecting the extremes of the scales. More than any other cluster they think that 'truth' is subjective, and believe that they are better informed than most, making them cognitively closed to information that contradicts their ideas.

Media

While most respondents in this cluster engage with independent media at least multiple times per week (53%), engagement with non-independent outlets is still slightly higher. Compared to other clusters, this group views the influences of the EU and the government on the media more positively.

81% of this cluster want to accelerate EU integration

85% believe the EU has a positive influence on the media

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Closed-minded Liberals and independent outlets

Why they matter

- This cluster has been identified as a target audience, given that while **awareness of independent media is low, trust is higher** than for non-independent.
- Nearly half (45%) within this cluster currently don't see their views represented in the media.
- 91% believe media should be impartial and 83% do not think it is appropriate for media companies to be owned by politicians.
- While most respondents in this group do not hold a subscription, nearly a third say they are open to having one in the future (29%) and that they will likely subscribe to a trial in the future (31%)

How to win them over

- **Reach them:** This group engages with news websites and apps and music or video streaming at least multiple times a week. When it comes to consuming news, they prefer reading articles more than any other format.
- **Engage them:** A variety of content appeals to them, but they mostly want informative content on investigative journalism, national news, the economy and social issues.
- **Gain their trust:** They want a lot from outlets, over-indexing on all subscription drivers and factors that would increase trust. In particular, they identify independence from the government and honest reporting as the top two factors that would increase their trust.

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Open-minded Centrists: Full profile

Key Demographics

This cluster is mostly under 54, with a third aged 18-34. They work full time or identify as a housewife/house husband. They are more likely than most to have dropped out before secondary education and have the lowest number of university graduates.

Political orientation

43% of this cluster support further integration with the EU, but half were undecided and did not choose either extreme. This cluster is more likely to answer ‘Don’t know’ for all questions. They are socially conservative, demonstrating disproportionately low support for equal gender roles.

Cognitive Openness

They are very centrist in their views and cognitively open. They are less likely to think that they are better informed than others and are also less likely to think that truth is subjective. This makes them more susceptible to disinformation narratives, but also means that they are an important target to engage through independent media.

Media

The least engaged group, they are more exposed to non-independent and state media than independent media. Trust for all outlets is rather low.

1 in 4 in this cluster do not know which value system Bulgaria should align with in future

1 in 3 in this cluster are willing to acquire a free trial for paid content in future

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Open-minded Centrists and independent outlets

Why they matter

- Being the most **cognitively open** makes this cluster particularly vulnerable to disinformation narratives while at the same time an optimal target for independent outlets to change their current media habits and establish engagement
- This cluster has low awareness of all outlets but especially low awareness of independent outlets. Their trust for known outlets is relatively low. This gives independent media outlets the opportunity to establish trust and awareness with these audiences
- While most respondents in this group do not hold a subscription, a third say they are open to having one in the future (32%) and that they will likely subscribe to a trial in the future (34%)

How to win them over

- **Reach them:** This cluster mainly consumes content via social media and TV, but also over indexes on video and music streaming services. They are more likely than any cluster to watch the only independent TV channel in Bulgaria (TV1).
- **Engage them**: This cluster prefers light entertainment, but their preferences are not strong in comparison to other clusters.
- **Gain their trust:** Honest reporting, independence from the government and a balanced view are the most important qualities in an outlet to form trust for this cluster. If independent media can demonstrate these qualities successfully, while appealing to this cluster's preference for lighter, entertaining content, then they may be more willing to engage.

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Informed Conservatives: Full profile

Key Demographics

This cluster is the largest (29% of the respondents). They are predominantly female, middle-aged or over 55, work full time and have a moderate/good financial status. They line up with the rest of the sample in terms of education, with 59% having completed tertiary education.

Political orientation

This cluster is extremely opposed to the EU and are also more likely to see the influence of foreign businesspeople and the U.S. government on Bulgarian media as negative.

Cognitive Openness

Most in this cluster (59%) believe that their views are not represented by the media. They are cognitively closed, as they believe that they are more informed than others and that truth is relative.

Media Exposure

Most in this cluster think that the Bulgarian government and the EU have a negative influence on the media in Bulgaria. They have the highest awareness and engagement of non-independent outlets. Nevertheless, trust levels are at a similar level for both independent and non-independent media.

85% of this cluster believes that the media they engage with should be impartial

Most believe the government and the EU have a negative influence on media

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Informed Conservatives and independent outlets

Why they matter

- While this group's awareness and engagement **independent media is lower than** for non-independent, they are **more trusting of independent media** giving outlets the opportunity to build an audience base in this group if they can raise awareness and build trust.
- A big part of this group also claims it currently often doesn't see their views reflected in the media (59%), making it more probable for them to seek new media platforms to engage with.
- Most respondents in this group do not hold a subscription, although a third say they are open to having one in the future (30%) and that they will likely subscribe to a trial in the future (32%)

How to win them over

- **Reach them:** This cluster mostly accesses social media as well as TV. They prefer to read articles, but also consume short form videos, follow threads and read articles.
- **Engage them:** This cluster wants content relating to travel and informative/educational pieces. They also want to see content that defends traditional values, celebrates Bulgaria and helps social progress.
- **Gain their trust:** This group believes that honest reporting, independence from the government and holding powerful people to account are the most important factors for organisations to form trust. If independent outlets can prove themselves to be trustworthy and reflect this cluster's traditional, national values, they can build a solid audience base.

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Disengaged Conservatives: Full profile

Key Demographics

They have disproportionately conservative social attitudes but are economically left-wing (which reflects the fact that this is the poorest and youngest cluster). A third have low income and have 45% of this cluster has only completed secondary education.

Political orientation

63% of this cluster want to reverse integration with the EU. They don't strongly identify with any particular group, but they are less likely than other clusters to say that being European is important to their identity.

Cognitive Openness

This cluster is cognitively closed-off as most think that they are better informed than others (58%) and are disproportionately likely to think that 'truth' is just what someone chooses to believe (64%).

Media Exposure

They are more likely to regularly access non-independent news outlets. More than any other group, they think that the current Bulgarian government (84%) has a negative influence on the media.

78% of this cluster is highly exposed to non-independent media

60% do not see their views often reflected in the media

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Disengaged Conservatives and independent outlets

Why they matter

- This cluster has high engagement with non-independent media outlets but are **more likely to trust independent outlets than non-independent.**
- They are motivated to trust outlets that investigate into powerful individuals, are independent from government and publish honest reporting.
- Just under third in this cluster say they are open to having an online news subscription in the future (26%) and that they will likely subscribe to a trial in the future (26%)
- This cluster thinks that they are better informed than most, and is certain that truth is relative, making this cluster generally **unwilling to engage with content that challenges their views.**

How to win them over

- **Reach them:** They mostly access content via social media and TV, but this cluster is the least likely to engage with news websites or apps. They also prefer to consume news through video (short form and long form) more than other clusters.
- **Engage them:** This group is looking for content relating to comedy, science and education. Although drivers for subscriptions for this cluster are limited, this cluster could be encouraged to subscribe to independent outlets that offer unique and appealing content, as a lack of interesting content is a key subscription blocker for this cluster.
- **Gain their trust:** This group thinks that holding powerful people to account, independence from government and honest reporting are key to forming trust.

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