



# Media consumption in Hungary

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

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# 01 Methodology

# Methodology

## RESEARCH OBJECTIVES

### Overall objective:

- Support independent media in Hungary
- Identify target audiences for independent outlets
- Explore best practices for independent outlets to reach/engage target audiences
- Support independent outlets on gaining audiences' trust and increase their willingness to pay for subscriptions

## METHODOLOGICAL DETAILS

### Method:

- Online quantitative survey
- 40 questions in total

### Sample and timings:

- Sample: 2017 respondents in Hungary
- Fieldwork February 21<sup>st</sup> -27<sup>th</sup> 2023
- Weighting efficiency: 95.12%

# Research Questions

1

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

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**?

# Key Variables

## DEMOGRAPHICS

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

## 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

## IDENTITY AND VALUE ALIGNMENT

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

## EXPECTATIONS FOR MEDIA

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

# Sample details

- 2017 respondents in total
- Online quota sampling
- Sampled and weighted to be representative of Hungary by **age, gender, region, education** in line with census data
- Weighting efficiency: 95.12%

48%

Male

52%

Female

25%

18-34 years old

41%

35-54 years old

34%

55+ years old

7%

Live in central Budapest

23%

Live in the wider Budapest area (Pest County)



# Cluster methodology

<b>Clustering Methodology</b>	We conducted a k-means cluster analysis using 5 continuous variables, selected based on prior research and local expertise		
<b>Key Variables</b>	<b>Political Views</b>	<b>Response type</b>	
	Hungary should <b>accelerate/reverse</b> its integration with the EU	Scale 1-7 (1=accelerate;7=reverse)	
	It is best to have <b>strong leader</b> who can take decisions without interference from parliament/ <b>strong parliament</b> to hold government to account	Scale 1-7 (1=accelerate;7=reverse)	
	It is important that media respect the authorities	Scale 1-5 (1=strongly disagree;5=strongly agree)	
	<b>Cognitive Openness</b>		
	I am better informed than most	Scale 1-5 (1=strongly disagree;5=strongly agree)	
	"Truth" is just what someone chooses to believe	Scale 1-5 (1=strongly disagree;5=strongly agree)	

# 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.
- 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 susceptible to timely events.

# 02 Key findings

# What we've learned

1. People's political orientations and international views are somewhat reflected in their exposure to independent vs non-independent media. While more liberal groups are more highly exposed to and engage with independent media more, the same is true for conservatives and non-independent media.
2. Divisiveness seems to be particularly evident for the consumption of online news. While non-independent online news outlets engage with conservatives more than liberals, TV channels seem to attract a less politically polarised audience.
3. Overall, both awareness and trust levels for the media in Hungary are currently low. While for liberals, trust is slightly higher towards independent media, the same is true for conservatives and non-independent media. However, low levels of awareness mean that independent outlets have the chance to connect with currently disengaged audiences by establishing a novel reputation that aligns with audiences' expectations and meets their criteria for developing trust.
4. Most Hungarians, and more liberal groups in particular, agree that independence of media from the government is a key factor in forming trust for any media organisation.
5. Most Hungarians don't have a paid subscription to any media outlet and don't want one in the future. However, those with more extreme political views at both ends of the spectrum are more willing to pay, reflecting their overall higher engagement with media and inclination to be more informed than others. Their higher engagement with media might also explain their greater polarisation of political views.
6. Among those that currently have a news subscription or are likely to consider one in the future, quality of content and being a reputable source are key factors driving media payment, while honest reporting and being independent from the government are essential to forming trust.

# 03 Clusters in detail

# Our 5 groups in a nutshell



20%

## Informed Conservatives

Youngest of groups  
 Lowest education level  
 Lowest Income  
 Most likely to identify with members of the same religion  
 Against EU integration  
 Socially Conservative  
 Most DON'T view government influence on media as negative  
 Cognitively Closed-off



35%

## Open-minded Nationalists

Mostly Middle-aged  
 Mid education level  
 Moderate/Good Income  
 Identifies as being Hungarian more than anything else  
 Against EU integration  
 Socially Moderate  
 Half view influence of government of media as negative  
 Cognitively Open



16%

## Disengaged Democrats

Mostly Middle-Aged  
 High education level  
 Good Income  
 Identifies as being both Hungarian and European very strongly  
 Quite Pro-EU integration  
 Socially Liberal  
 Most view government influence on media as negative  
 Very Cognitively Open



20%

## Discerning Europeans

Mostly Older  
 Mid education level  
 Good Income  
 Identifies as being European more than being Hungarian  
 Pro-EU integration  
 Socially Liberal  
 Most view government influence on media as negative  
 Cognitively Open but Sceptical








9%

## Engaged Liberals

Oldest of groups  
 Highest education level  
 Good Income  
 Most likely to identify as European and with those sharing political ideals  
 Pro-EU integration  
 Socially Liberal  
 Most view government influence on media as negative  
 Cognitively Closed-off

# Based on their current relationship with the media we've identified more liberal clusters as being the easier targets for independent media outlets

	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 media
 <b>Informed Conservatives</b> (20%)	<b>47%</b>	Equally aware of independent and non-independent	Similar engagement levels for independent and non-independent	Low trust overall Slightly higher trust for non-independent	More likely to believe media should respect the authorities	<b>42%</b>
 <b>Open-minded Nationalists</b> (35%)	<b>44%</b>	Equally aware of independent and non-independent	Similar engagement levels for independent and non-independent	Low trust overall Mixed levels for independent and non-independent	More likely to believe media should not receive financial support from abroad	37%
 <b>Disengaged Democrats</b> (16%)	30%	Slightly <b>more aware of independent</b>	Similar engagement levels for independent and non-independent	Low trust overall Higher trust for <b>independent</b>	Most likely to say it is important that media should be impartial	26%
 <b>Discerning Europeans</b> (20%)	20%	Slightly <b>more aware of independent</b>	Higher engagement for <b>independent</b> but high for index.hu	Higher trust for <b>independent</b> Telex.hu most trusted	Believe media should be impartial and not owned by politicians	30%
 <b>Engaged Liberals</b> (9%)	23%	Slightly <b>more aware of independent</b>	Highest engagement for <b>independent</b>	Highest trust for <b>independent</b>	Most likely to believe politicians should not own media	<b>40%</b>

# 04 Findings in detail

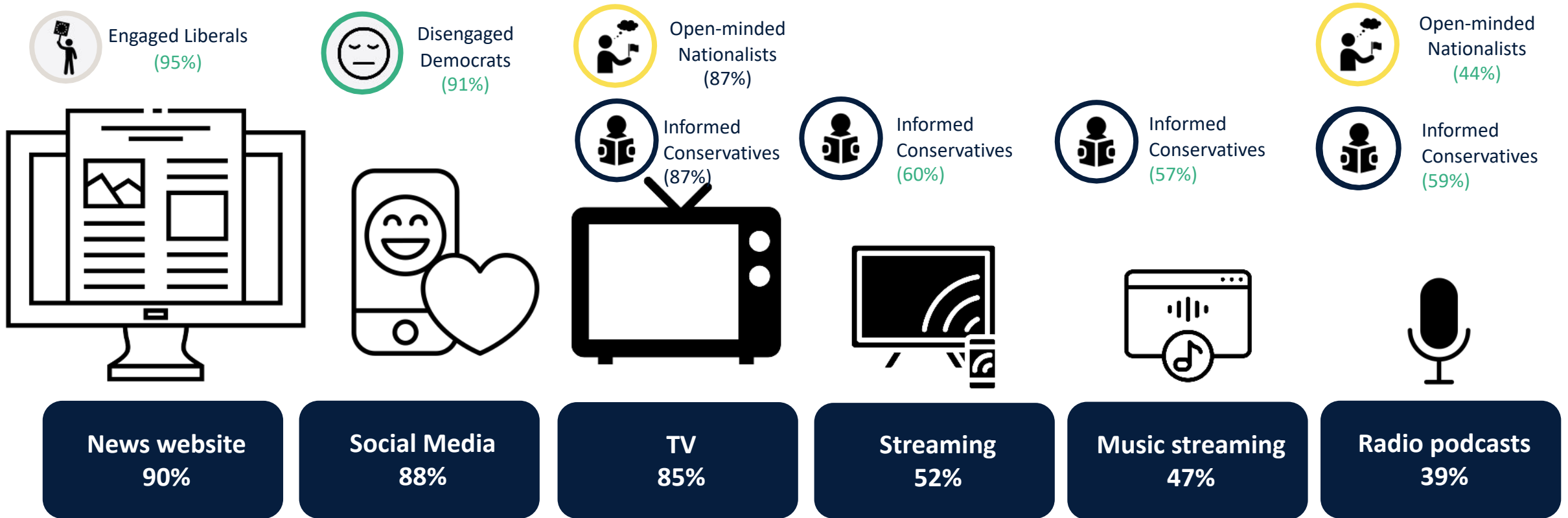


# Deep dive 1: Current media consumption

# Most Hungarians access different media platforms on a weekly basis, with no big differences among groups

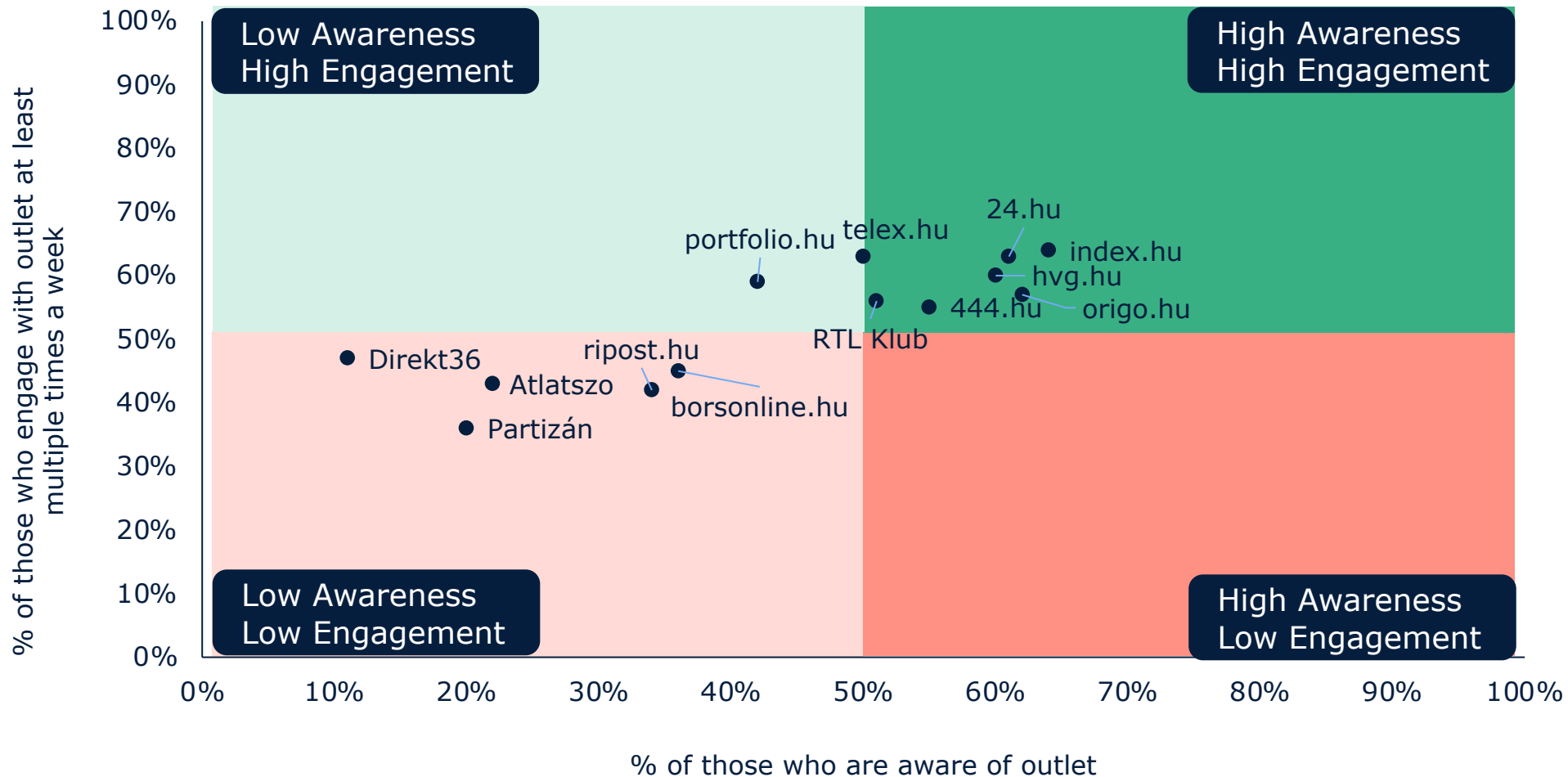
Platforms accessed at least multiple times a week in the last month

NB: Online figures may have been influenced by online methodology

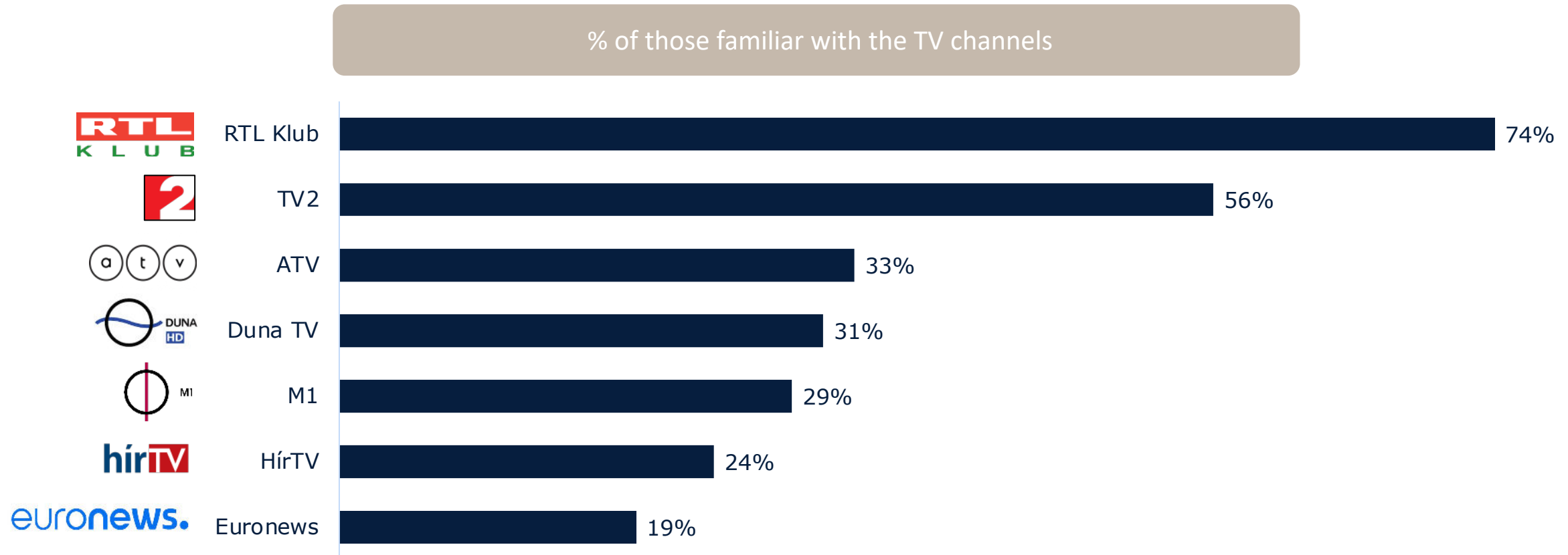


Text in green is statistically higher than average; text in red is statistically lower

# Currently, both independent and non-independent outlets are competing for strong awareness and engagement



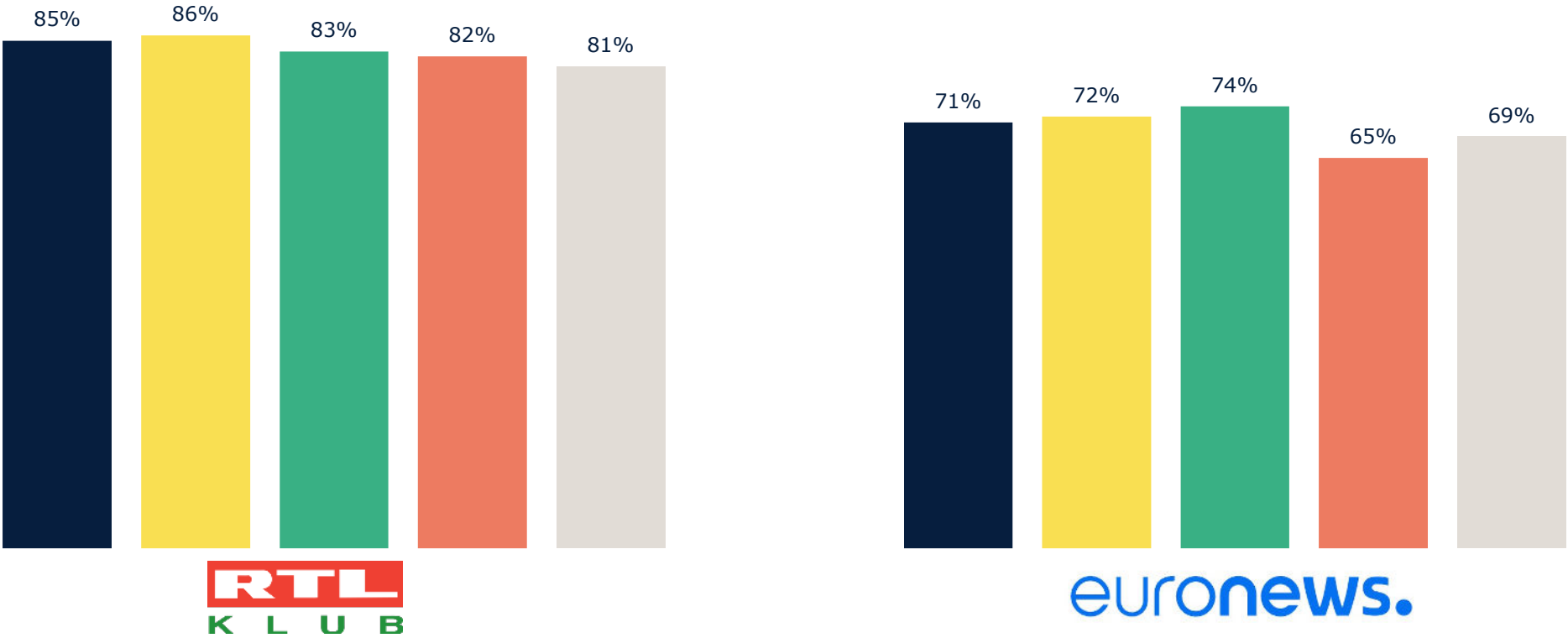
# When it comes to TV, RTL Klub is the best known channel across all groups



# And all groups engage with RTL Klub and Euronews at roughly the same level

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

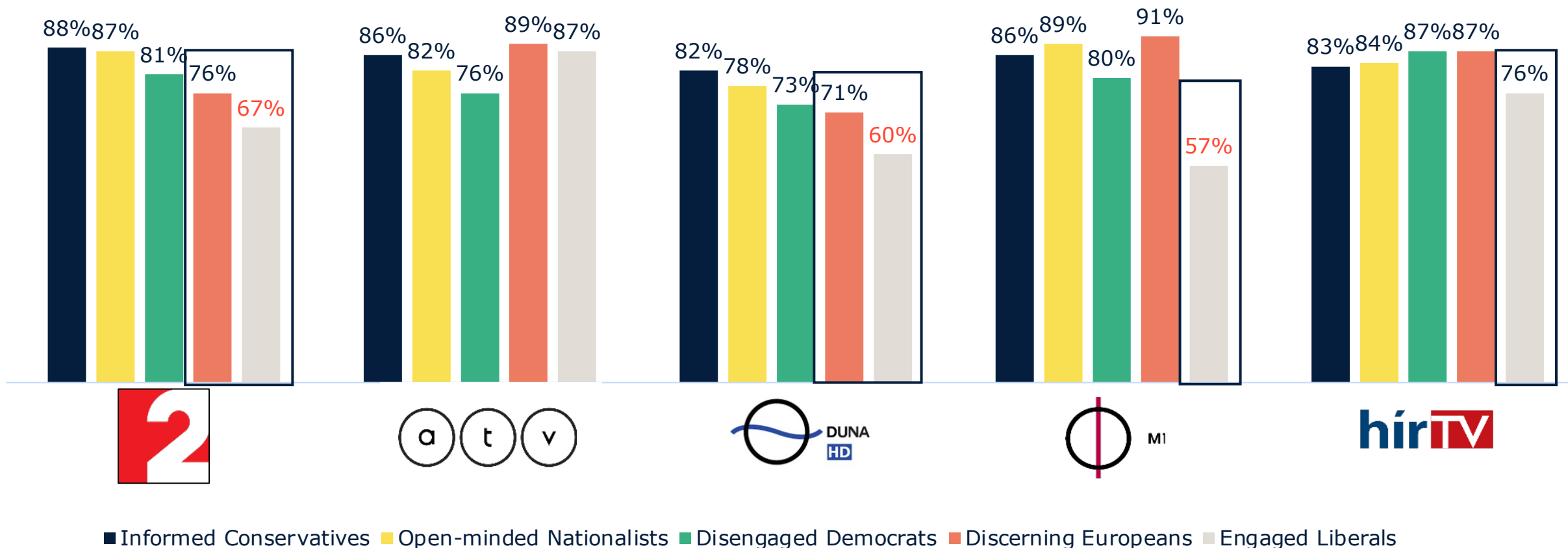
No significant differences across groups



■ Informed Conservatives   ■ Open-minded Nationalists   ■ Disengaged Democrats   ■ Discerning Europeans   ■ Engaged Liberals

# While the following TV channels struggle more to convert awareness into viewership among liberals

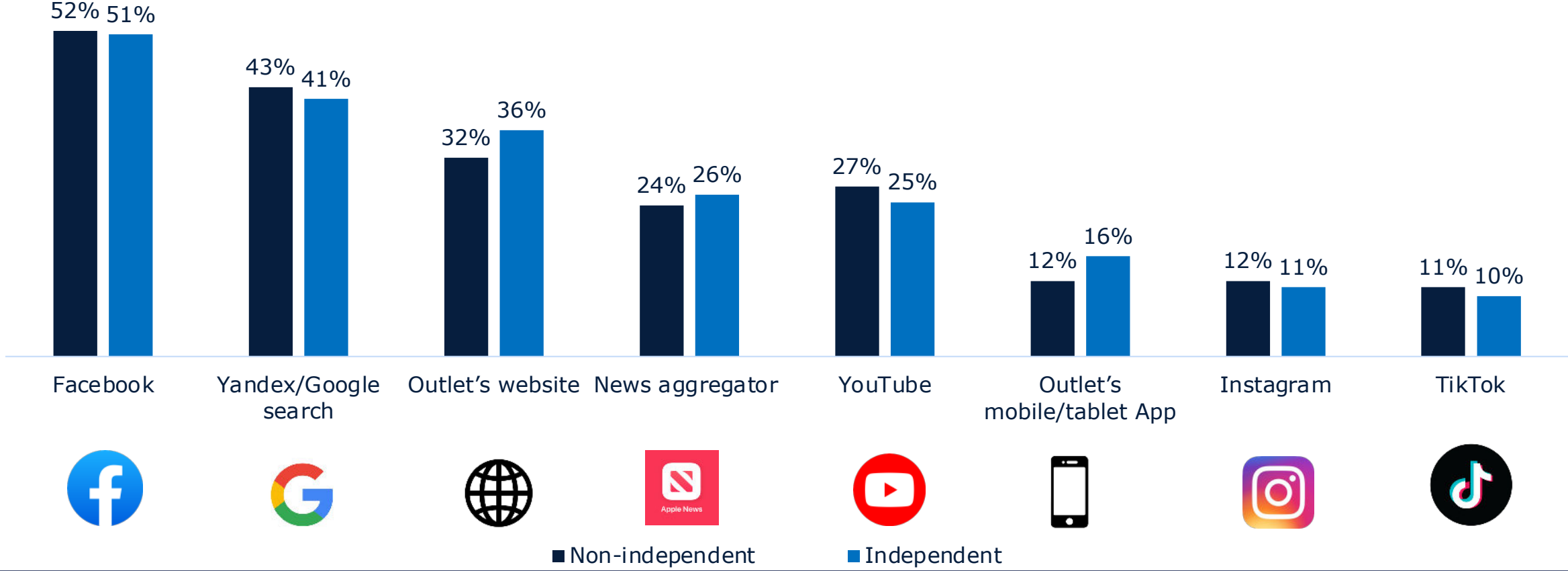
Of those aware: % that access channel at least multiple times a week



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

# When engaging with news outlets, there seems to be no difference between platforms used for independent and non-independent media

Platforms used to access outlets at least multiple times a week



# Deep dive 2: Willingness to pay for media



# Audiences at the extremes of the spectrum are the most willing to pay for online news content

## Willingness to pay for online news content

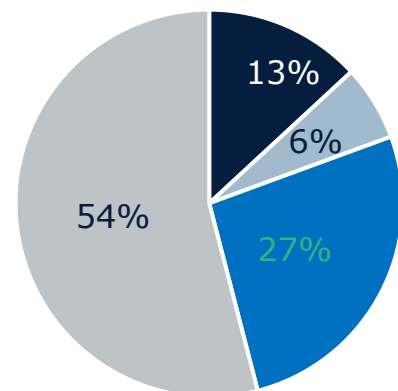
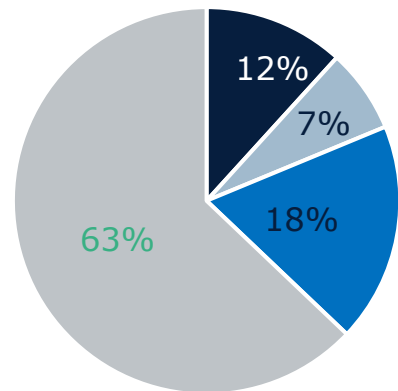
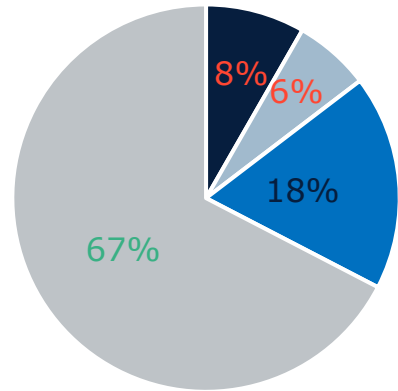
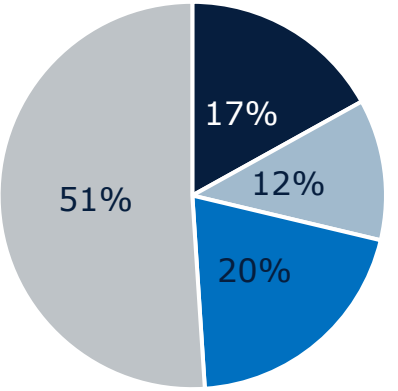
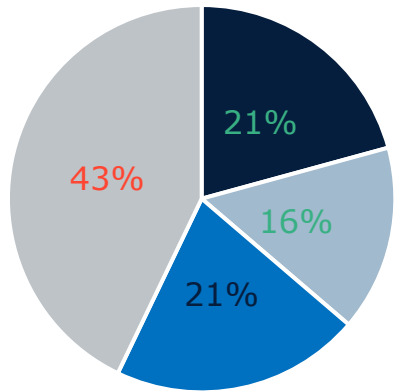
**Informed Conservatives**

**Open-minded Nationalists**

**Disengaged Democrats**

**Discerning Europeans**

**Engaged Liberals**

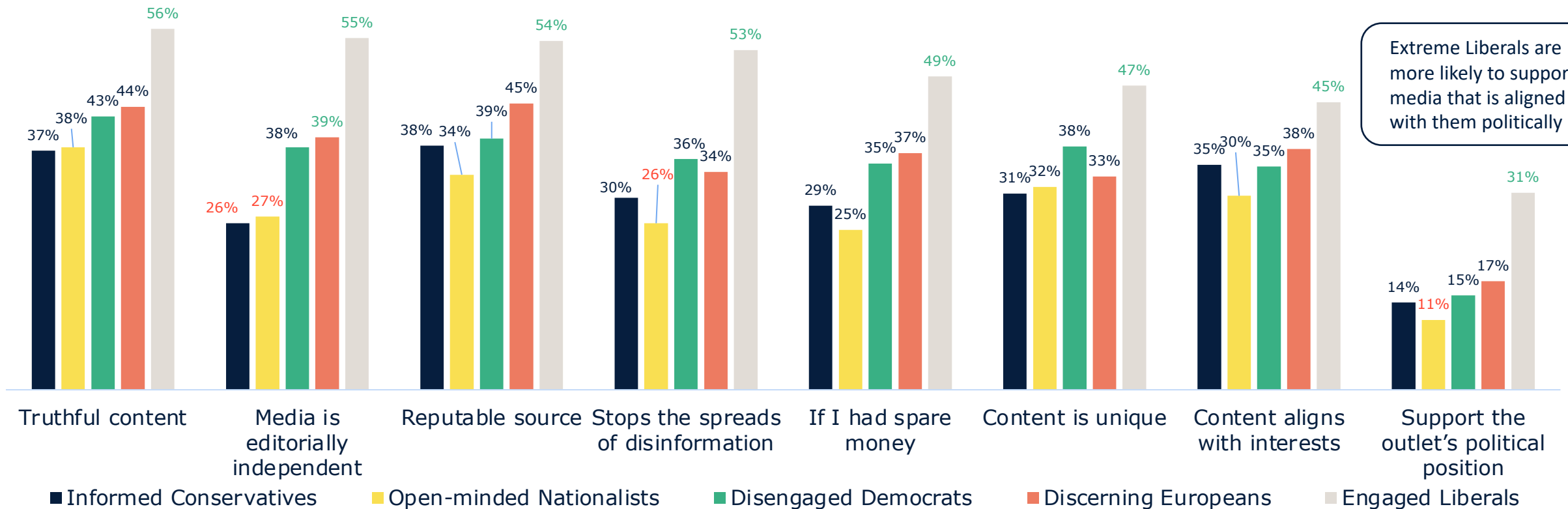


- Currently hold at least one online news subscription
- Had a subscription and no longer do
- Never had one but want one in the future
- Never had subscription and don't want one

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

# Most groups agree that truthful content and source reputation are key drivers of subscription, with Engaged Liberals stating their preference with greatest intensity






Factors that increase likelihood to pay for content



Extreme Liberals are more likely to support media that is aligned with them politically

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

# Quality of content and financial burden are the main factors that lead to the ending of paid subscriptions

	Total	Top 5 reasons for cancelling a financial subscription to news outlets				
		Informed Conservatives	Open-minded Nationalists	Disengaged Democrats	Discerning Europeans	Engaged Liberals
						
There is content of similar quality for free	36%	28%	35%	47%	43%	43%
The quality of the content decreased	35%	30%	31%	42%	45%	54%
I am trying to reduce my cost of living	32%	31%	25%	47%	41%	38%
It was not good value for money	29%	31%	29%	23%	22%	54%
There was not enough interesting content	28%	15%	30%	34%	40%	48%

NB: Groups DD, AE and EL all have base sizes below 30  
 No statistically significant difference between data points

# Deep dive 3: Trust

# Overall, trust is strongly attributed to neither independent nor non-independent media outlets

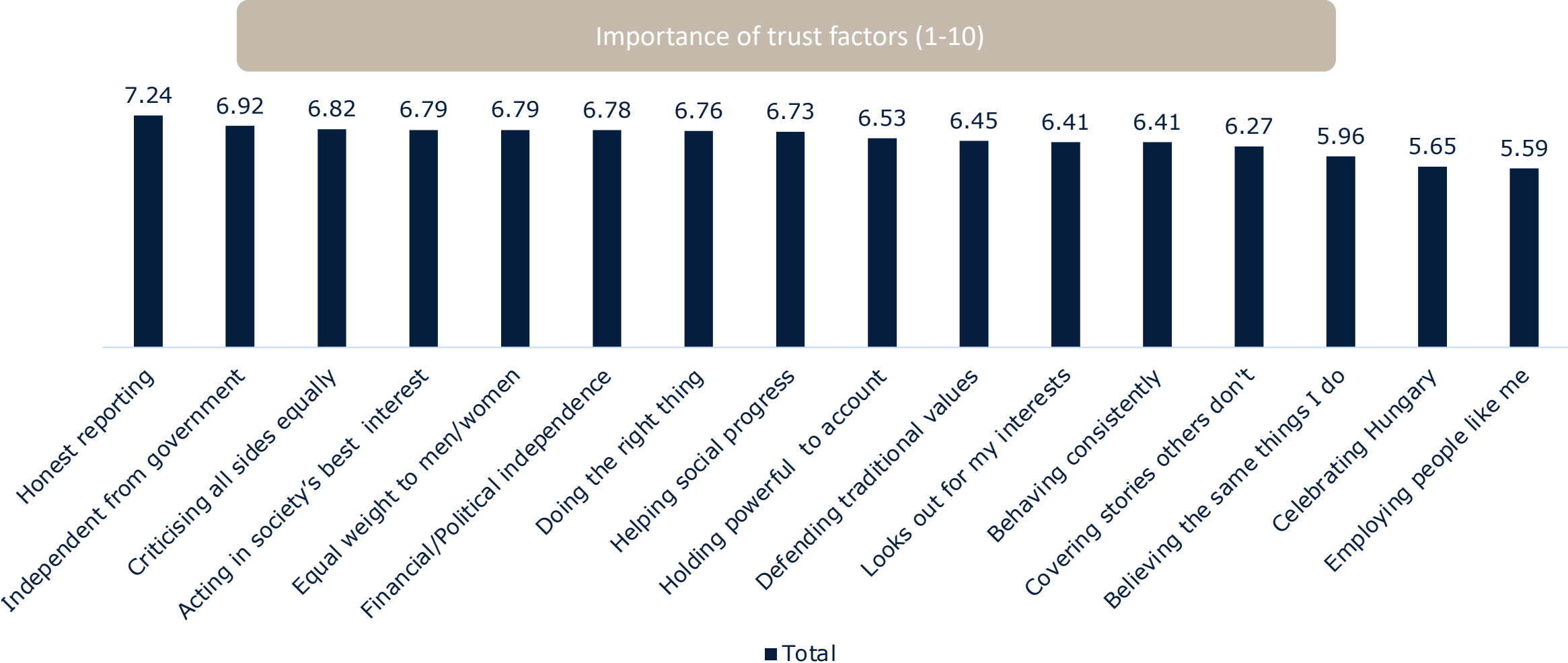
## Top Attributes for Independent Media



## Top Attributes for Non-independent Media



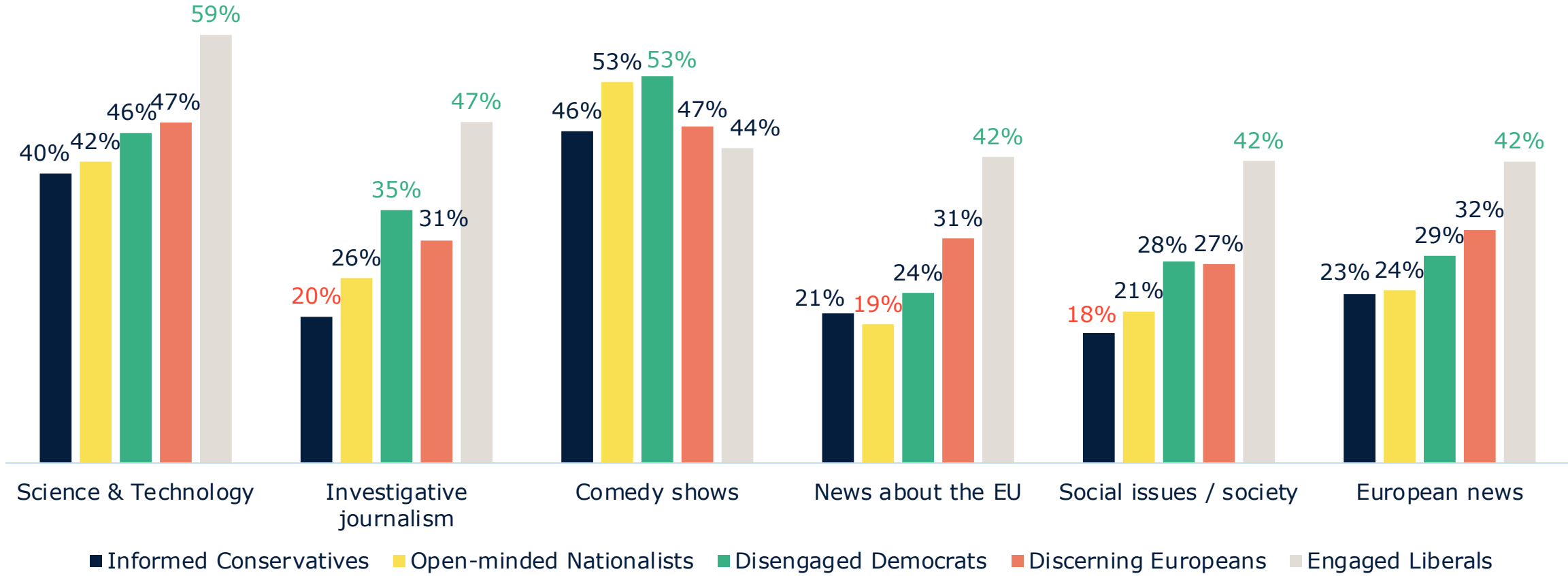
# Honest reporting, independence from the government, and criticising all sides equally are key drivers of trust



# Deep dive 4: What content do people want?

# Target groups specifically want more science and technology, investigative journalism, and comedy

What types of content would you like to see more of?



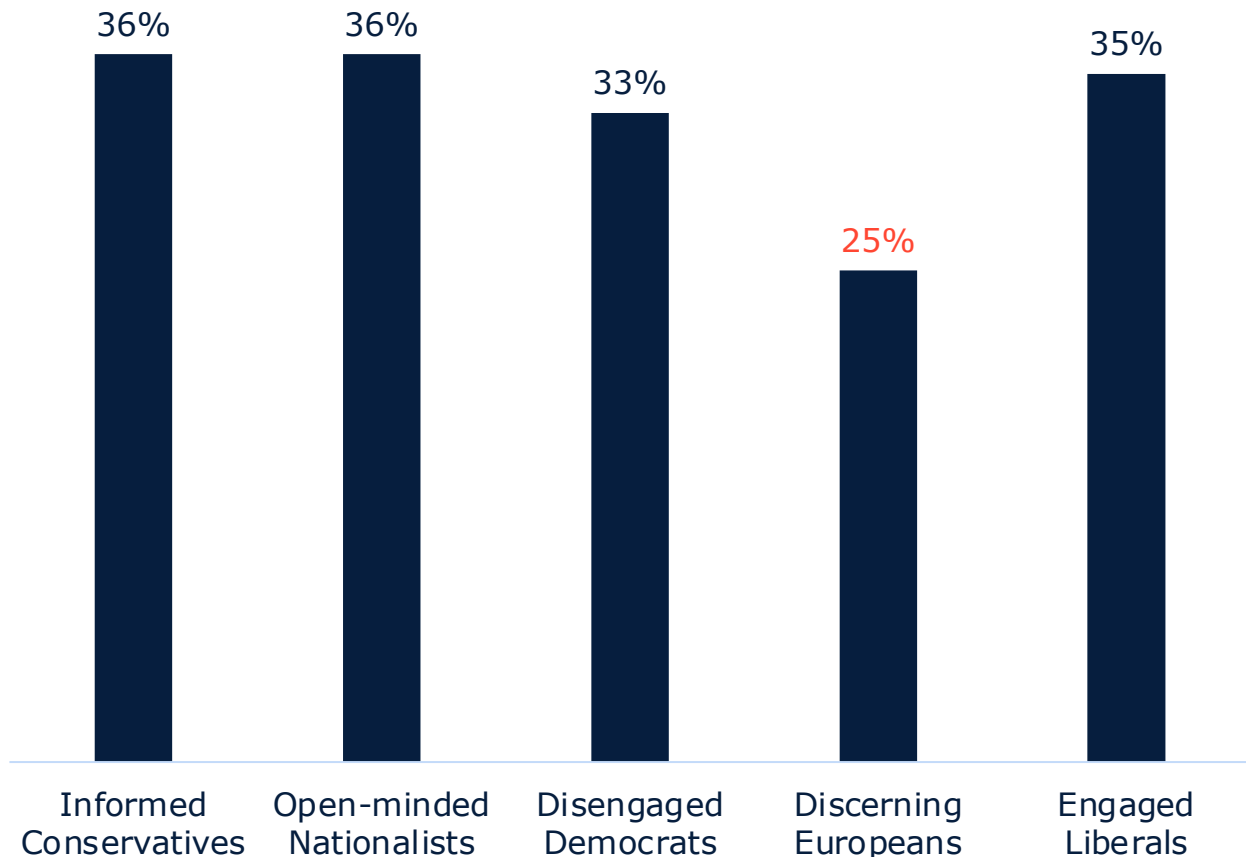
Text in green is statistically higher than average; text in red is statistically lower



# Deep dive 5: Attitudes towards media

# 1 in 3 Hungarians don't believe their views are often reflected in the media

% Agree "I do not often see my views 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),  
Informed Conservatives (407), Open-minded Nationalists (699), Disengaged  
Democrats (323), Discerning Europeans (392), Extreme Liberals (182)

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

# Most Hungarians agree that media should be impartial – especially those in identified key target groups

% Agree “It is important that the news I watch is impartial”

**Informed  
Conservatives**



62%

**Open-minded  
Nationalists**



69%

**Disengaged  
Democrats**



84%

**Discerning  
Europeans**



79%

**Engaged  
Liberals**



82%

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

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.

# 05 Appendix

# Engaged Liberals: Full profile



## **Key Demographics**

This is the smallest cluster (9% of total participants). This cluster is well educated, with above average completion of higher education (40%), and a very small number having only completed primary school (2%). They also have the highest number of English-speakers than any other cluster. This cluster is financially comfortable, they are mostly over 55 and are either working full-time or retired.

## **Political Orientation**

They are the most liberal, pro-EU, and politically active group. They strongly support closer integration with the EU and identify with being European above all other identifiers.

## **Cognitive Openness**

This cluster recognises objective truth, but above all other clusters they believe that they are better informed than others. For this reason, this group is described as cognitively closed, making it more difficult to change their point of view on topics they deem important.

## **Media Exposure**

This group is the most exposed and likely to engage with independent media. They value media impartiality the most and are the cluster that perceives influences from the Hungarian government and Hungarian businesspeople as most negative.

This cluster is disproportionately likely to identify with those who share their political views

They score the lowest in identifying with Hungarian nationality



# Engaged Liberals and independent outlets

## Why they matter

- This group is currently the **easiest target for independent media**. They are the most aware, trusting and engaged group with independent media already
- They are also the biggest believers in media impartiality and are the **group most likely to want to pay for a subscription** to online news in the future
- They are also cognitively most closed off than other groups as they believe to be more informed than most, which makes them **less vulnerable to trusting media that disagrees with their current liberal political view**

## How to win them over

- **Reach them:** They are the most frequent users of news sites/apps. However, they also view TV and social media multiple times per week
- **Engage them:** This group wants more content relating to science and technology, investigative journalism and news about Europe
- **Gain their trust:** They believe independence from the government and honest reporting are key trust drivers. They are also the most willing to pay for a subscription, as long as the content is accurate, truthful and comes from a reputable source

# Discerning Europeans: Full profile



## **Key Demographics**

This cluster is mostly over 55 and either retired or working full time. They are moderately well-educated (in line with country average) and have a decent level of financial stability.

## **Political Orientation**

They hold liberal/centrist social values and are economically right-wing. They are also pro-Europe and fairly politically engaged. They identify with being European more than being Hungarian.

## **Cognitive Openness**

This cluster is less confident about defending their views, as more so than any of the other clusters they believe that truth is subjective and believe to be less informed than others. This makes this cluster cognitively open, which means they are more easily persuadable and ready to change their minds compared to more closed-off groups.

## **Media Exposure**

They are exposed to both independent and non-independent media and, although low, trust levels are higher for independent media than non-independent media. They are also more likely to favor support to media from abroad compared to other groups.

70% say being European is very important to their identity

61% view the influence of the EU on media as positive





# Discerning Europeans and independent outlets

## Why they matter

- Although their levels of trust in media are generally quite low, they are slightly higher for independent outlets than for non-independent. Their lower awareness of independent outlets makes it **easier for these to build a reputation** that meets their expectations for media and **instils trust**
- Although they are one of the least likely groups to want an online news subscription in the future, they do claim that **independence from the government is a key driver** for media payment, giving independent media outlets an advantage on this audience compared to non-independent media

## How to win them over

- **Reach them:** This group engages with news sites, social media and TV at least multiple times per week
- **Engage them:** They want more content that relates to both comedy as well as science and technology. When it comes to news, they want more information relating to the economy in Hungary, Europe, as well as investigative journalism
- **Gain their trust:** They believe that honest reporting and independence from the government are key factors in forming trust for organisations



# Disengaged Democrats: Full profile

## **Key Demographics**

This group makes up 16% of the sample. It is predominantly middle-aged and has a good level of education, with above average completion of tertiary education. They work full-time and are financially comfortable.

## **Political orientation**

Although this cluster holds broad liberal values, supports a democratic government system and seeks closer integration with the EU, they are less vocal about their political thoughts and are more likely to respond with "Don't know" to questions asking about Hungary's ideal value alignment in the future.

## **Cognitive Openness**

They do not think that they are better informed than others and they believe truth is an objective concept. This predisposes them to be more open-minded and receptive to different perspectives or ideas.

## **Media Exposure**

The least engaged group, they're roughly equally exposed to both independent and non-independent media. Their levels of trust are the lowest of all overall, but they are slightly higher for independent media. They tend to believe the government has a negative influence on media.

1 in 4 in this cluster do not know which values Hungary should align with



# Disengaged Democrats and independent outlets

## Why they matter

- This group stands out for being the most uncertain on the future alignment of Hungary while being **cognitively open**. This makes them equally vulnerable to disinformation narratives, as well as an important target for independent media to engage with
- Despite being currently less engaged, this group also shows openness towards engaging with news. Around **1/3 is willing to sign up for a free trial** for news subscriptions in the future
- They are also more likely than the previous groups to **welcome support from abroad**, which could be used as a positive differentiator by independent media outlets
- Trust levels are higher for independent media

## How to win them over

- **Reach them:** This group engages with social media significantly more than any other group, although they do use news sites and TV at least multiple times per week
- **Engage them:** This group is the biggest fan of comedy-related content. In terms of news, they enjoy a mix range of content, including that relating to the EU, to Hungary, to the economy and to politics
- **Gain their trust:** This group believes that honest reporting, independence from the government and doing the right thing are the most important factors for organisations in forming trust



# Open-minded Nationalists: Full profile

## ***Key Demographics***

This cluster is the largest with 35% of the respondents. They are predominantly middle-aged, work full time and have a moderate/good financial status. They are also well-educated, lining up with the country average in terms of education.

## ***Political orientation***

While this cluster is politically conservative, they are not all Orbán supporters. Their nationalist sentiments are expressed by their extreme opposition to the EU, to the government of the U.S. and to foreign businesspeople.

## ***Cognitive Openness***

While they do express nationalist sentiment, they are less extreme than informed conservatives on their views and they are less certain about what they want Hungary to align with in the future. They believe to be less informed than others and most don't view truth to be relative. This makes them cognitively more open and a possible target for independent media.

## ***Media Exposure***

Quite heavily exposed to non-independent media. Overall, their awareness and trust levels are pretty low for both independent and non-independent compared to the rest of the groups.

No one in this cluster supports further integration with the EU



# Open-minded Nationalists and independent outlets

## Why they matter

- This group is the least likely to believe they are more informed than others, which could make them **open to information** that contradicts their ideas, and therefore a good target for independent media
- Their media brand awareness is overall quite low (especially for independent media), granting outlets the opportunity to form a trusting brand reputation and then increase awareness
- They have the **smallest percentage** of people **not willing to ever get a news subscription** in the future
- They constitute the biggest cluster within our sample (**35% of respondents**)

## How to win them over

- **Reach them:** They mostly access news sites, TV and social media multiple times per week. They watch TV and listen to radio podcasts more than other groups
- **Engage them:** This group wants more content relating to comedy. They are less likely than other groups to care about news about the EU and want more national and local news
- **Gain their trust:** This group believes that honest reporting, independence from the government and looking out for their personal interests are the most important factors for organisations to form trust



# Informed Conservatives: Full profile

## ***Key Demographics***

This cluster makes up 20% of the overall sample. They have disproportionately conservative social attitudes compared to the rest of the respondents, but they are economically left-wing (which reflects the fact that this is the poorest and youngest cluster). 61% are aged 18-34 and a third have a very low financial status. They have some of the lowest education levels out of all the clusters, with almost 20% of this cluster having completed only primary education.

## ***Political orientation***

The most supportive of a political system with a strong leader as opposed to one with a strong parliament. They identify with those who share their religion above all others. They are the group most likely to view the Church's influence on society as positive and advocate for its active involvement in Hungarian public life.

## ***Cognitive Openness***

This cluster is quite cognitively closed-off, in general thinking that they are better informed than most and are above average in their conviction that 'truth' is just what someone chooses to believe.

## ***Media Exposure***

The most heavily exposed to non-independent media, they are more likely to be aware of non-independent news outlets and TV channels than independent ones. Compared to other groups, they rate the influence of the government on media less negatively. Overall, their trust levels are similar for independent and non-independent media.

The least likely to think it's not appropriate for politicians to own media

But 66% say that independence from the government is still important in forming trust



# Informed Conservatives and independent outlets

## Why they matter

- One of the **most media-engaged groups** we've identified
- Although currently slightly more exposed to non-independent media, **62% believe media should be impartial**, nearly half (48%) agree that the government has a negative influence on media, and nearly 1 in 3 believe media should be independent
- Current trust levels are similar for independent and non-independent media
- They are currently the greatest holders of online subscriptions (21%) and are **one of the most willing to pay for content in the future** (21%)
- They constitute **1/5 of respondents**

## How to win them over

- **Reach them:** They access news sites, TV and social media multiple times per week. They are also the biggest podcast and streaming audience
- **Engage them:** This group wants more content relating to comedy, health, science and technology. Regarding news, they favor national and local news more than international
- **Gain their trust:** This group believes that honest reporting and defending traditional values are key in forming trust. Knowing information comes from a reputable source is the main driver to having a subscription