ZINC
NETWORK

Media consumption in Poland

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

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Methodology in detail

Online Methodology

Online quantitative survey

13.5 minute interview length

Incidence rate is 97%

Drop out rate is 12%

Representative of Poland

2,017 Respondents

Representative of Poland by **age, gender, region, education** in line with census data.

Weighting efficiency is 98.94 %

Fieldwork in early 2023

23rd February – 2nd March 2023

Cluster analysis

K-means clustering

6 continuous variables selected based on local expertise

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

Research Questions

1

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

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

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

Sample details

- 2,017 respondents in total
- Online quota sampling
- Sampled and weighted to be representative of Poland by **age**, **gender**, **region, education** in line with census data

52% Female

48% Male

27% 18-34 years old

43% 35-54 years old

30% 55+ years old

14% Live in Masovian region (Warsaw area)

Cluster methodology

Clustering Methodology	We conducted a k-means cluster analysis using 6 continuous variables, selected based on prior research and local expertise	
Key Variables	***Political Views***	**Response type**
	Poland should **accelerate/reverse** its integration with the EU	Scale 1-7 (1=Accelerate;7=Reverse)
	The Catholic Church **should/should NOT** have an official role in public life	Scale 1-7 (1=Should;7=Should NOT)
	Influence on the media in Poland	
	The Polish government has a **positive/negative** influence on the media in Poland	Scale 1-5 (1= Very positive;5=Very negative)
	The EU has a **positive/negative** influence on the media in Poland	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)
	I am better informed than most	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.

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.

02 Key findings

What we’ve learned

1. **Within the Polish population, three segments have been identified as being more open to independent media and have therefore been labelled as potential target audiences.** These groups are either currently engaged with independent media or trust independent media more, or they are more cognitively open to doing so. These same groups are also more likely to hold a positive view of the EU and to be less opposed to media receiving support from abroad.

2. **Awareness and engagement are not big challenges for independent media.** Across all groups, most respondents claim to be aware of and engage with top independent media outlets at least multiple times a week. Onet, TVN24, and WP are the most popular media organisations across all groups.

3. **Independent outlets in Poland have a big untapped revenue opportunity.** While nearly one in five Poles are currently paying for an online news subscription, there’s roughly the same number of people that currently don't,but are open to paying for one in the future. Target audiences claim to also be open to subscribing to free trials, attending outlet events and making donations. In order to leverage this opportunity and drive media payment, outlets will need to demonstrate their **content is truthful and unique**.

4. **Increasing trust among Poles should become outlets’ priority.** While slightly higher for our target audiences, trust levels for media are generally low across all respondents, and popular independent outlets are underperforming on key trust drivers. To gain target audiences’ trust, outlets will need to demonstrate honest reporting, giving equal weight to men and women, and independence from the government. Organisations should also make sure they’re impartial, as all groups claim media impartiality is important to them.

5. **Independent media outlets should consider delivering more national, local and European news, as well as content relating to health,** as these have been identified as the most desired types of content in Poland, particularly among key target groups.

03

Clusters in detail

The analysis yielded 5 distinct groups:

Less open to independent media → More open to independent media

18% — Detached Conservatives

- Mostly middle-aged
- Mostly Male
- Mid Education level and Moderate Income
- Identify with being Polish and with their religion more than anything else
- More against EU integration than other groups
- Leaning conservative towards Church's public role
- More positive about government's influence
- Politically and Socially Conservative
- More cognitively open

14% — Disillusioned Libertarians

- Mostly middle-aged
- Equal gender distribution
- Mid Education Level and Moderate Income
- Identify with being Polish more than anything else
- Against EU integration and public role of the Church
- ½ don't see their views reflected in the media
- Negative about the government's influence
- Socially, Politically and Economically Conservative
- Most cognitively closed

22% — Relaxed Centrists

- Mostly middle-aged
- Mostly Female
- Mid Education Level and Moderate Income
- Most likely to identify with being Polish
- Centrist on EU integration
- Against public role of the Church
- Most view influence of government on media as negative
- More Socially Liberal
- Politically Centrist/Liberal
- More cognitively open

13% — Informed Conservatives

- Younger than other groups but mostly middle-aged
- Mostly Male
- Mid Education Level and Moderate Income
- Identify with being Polish and being European more than anything else
- Pro-EU integration
- Supports public role of the Church more than others
- More positive about government's influence
- Socially Conservative
- Politically Centrist/Conservative
- Cognitively closed

33% — Engaged Liberals

- Older
- Equal gender distribution
- Mid Education Level and Moderate Income
- Most likely to identify with being European
- Pro-EU integration
- Strongly against the public role of the Church
- View the influence of government on the media as negative
- Socially Liberal
- Politically Liberal
- Most cognitively open

More details in the Appendix

Target groups have been identified as they are either more aware, engaged and trusting of independent media, or are more cognitively open

Media dimensions	Awareness	Engagement	Trust	View on media impartiality	% Willing to pay
Detached Conservatives (18%)	**Lowest awareness** of top independent outlets	**Lowest engagement** with top independent outlet Onet.pl and **highest engagement** with state outlet TVP info	**Lowest trust overall** Higher trust for state media outlet TVP.info	Most likely to think that media should not be owned by foreign individuals and that media outlets should respect the authorities	43%
Disillusioned Libertarians (14%)	**Average awareness** of top independent outlets	**Average engagement** with independent outlets	**Lower trust overall**	Most likely to think that it is not appropriate for media outlet owners to have a say in what their outlets report	42%
Relaxed Centrists (22%)	**Average awareness** of top independent outlets	**Average engagement** with independent outlets	**Low trust overall**	Thinks it is important that media should be impartial and that politicians should not own media	43%
Informed Conservatives (13%)	**Average awareness** of top independent outlets	**Average engagement** with independent outlets (higher engagement with regional or local online paper compared to previous two groups)	**Low trust overall**	Most likely to think that media should not receive financial support from abroad and that media outlets should respect the authorities	57%
Engaged Liberals (33%)	**Highest awareness** of top independent outlets	**Highest engagement** for some of the top independent outlets	**Highest trust overall**	Most likely to think media should be impartial and that politicians should not own media	47%

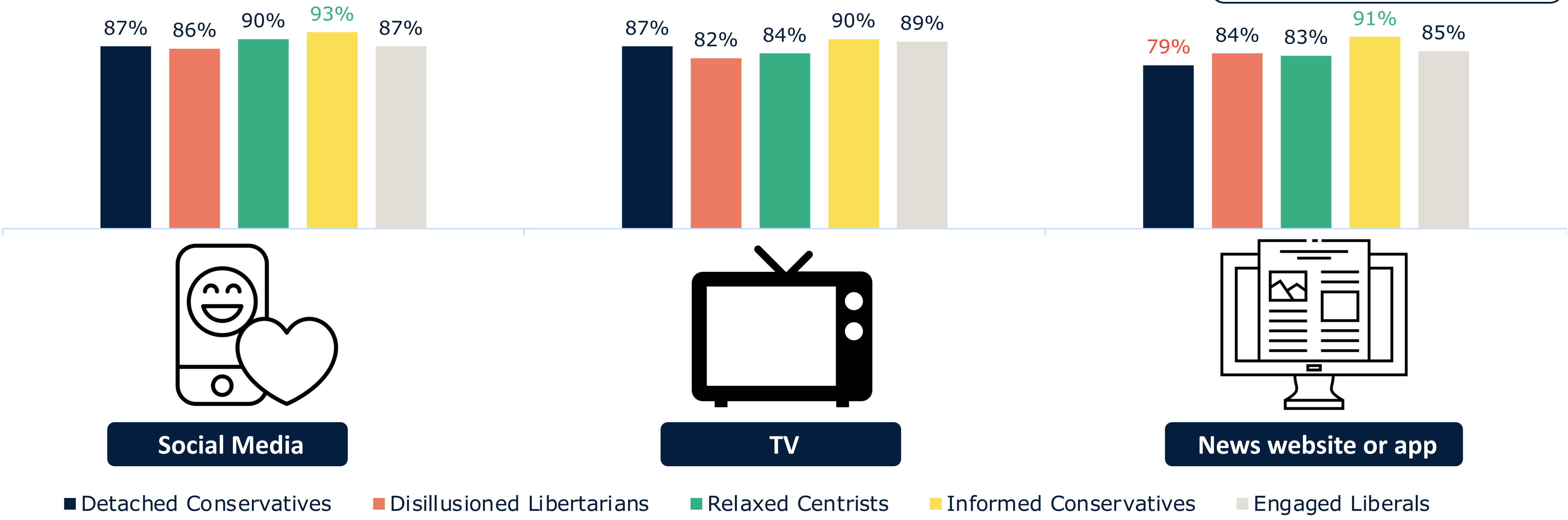
04 Findings in detail

Deep dive 1: Current media consumption

Social media, TV and news websites/apps are the most popular platforms among Poles

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

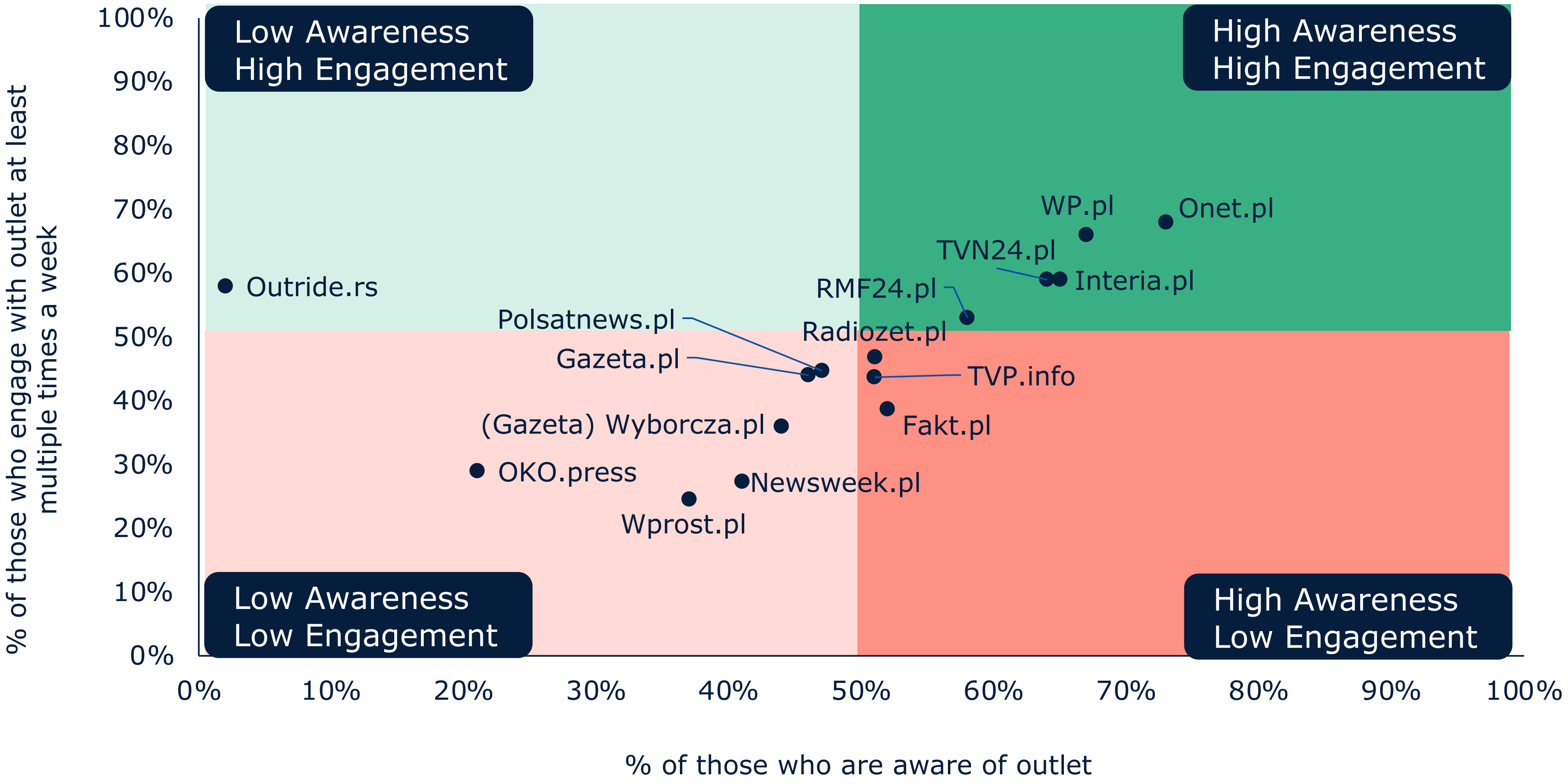
NB: Online figures may have been influenced by online methodology



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

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 (2017), Detached Conservatives (361), Disillusioned Libertarians (273), Relaxed Centrists (434), Informed Conservatives (260), Engaged Liberals (677)

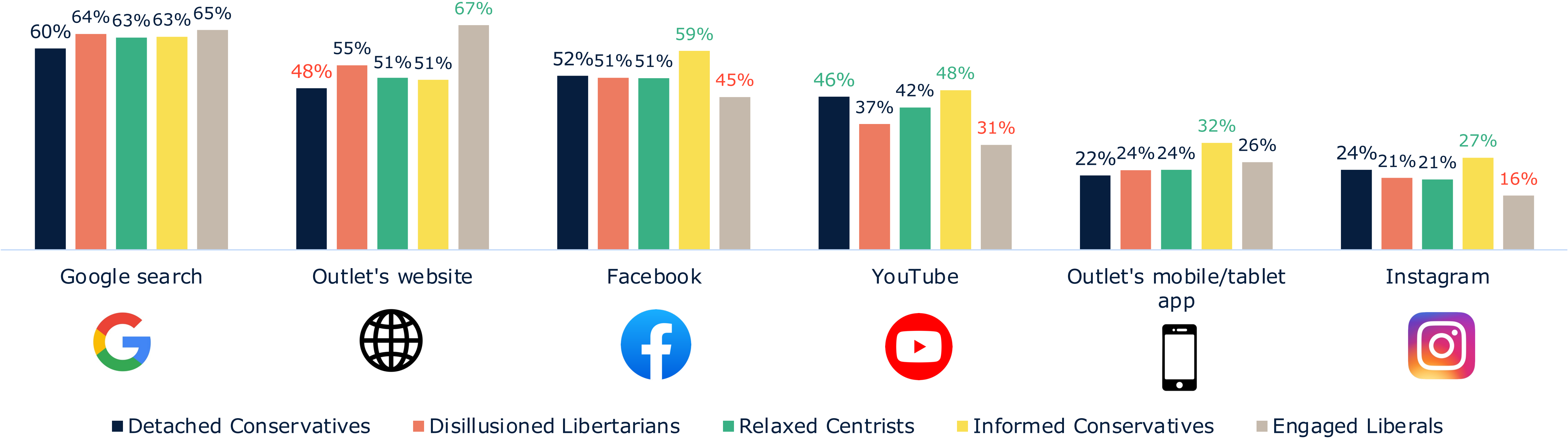
Onet.pl and WP.pl are the most well-known and engaged-with media organisations in Poland overall



Q7 Here is a list of news outlets. Which of these are you aware of? Base: All (2017), Detached Conservatives (361), Disillusioned Libertarians (273), Relaxed Centrists (434), Informed Conservatives (260), Engaged Liberals (677). Q8. And typically how often do you use each of them? Base. Those aware of the outlet. Varies by outlet.

While Informed Conservatives are more likely than others to access content via social media platforms, Engaged Liberals strongly prefer using outlets' websites

Platforms used to access independent outlets at least multiple times a week



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

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

When it comes to TV, channels TVP1 and TVP2 are less popular among Relaxed Centrists and Engaged Liberals, who consume most content from TVN and Polsat

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

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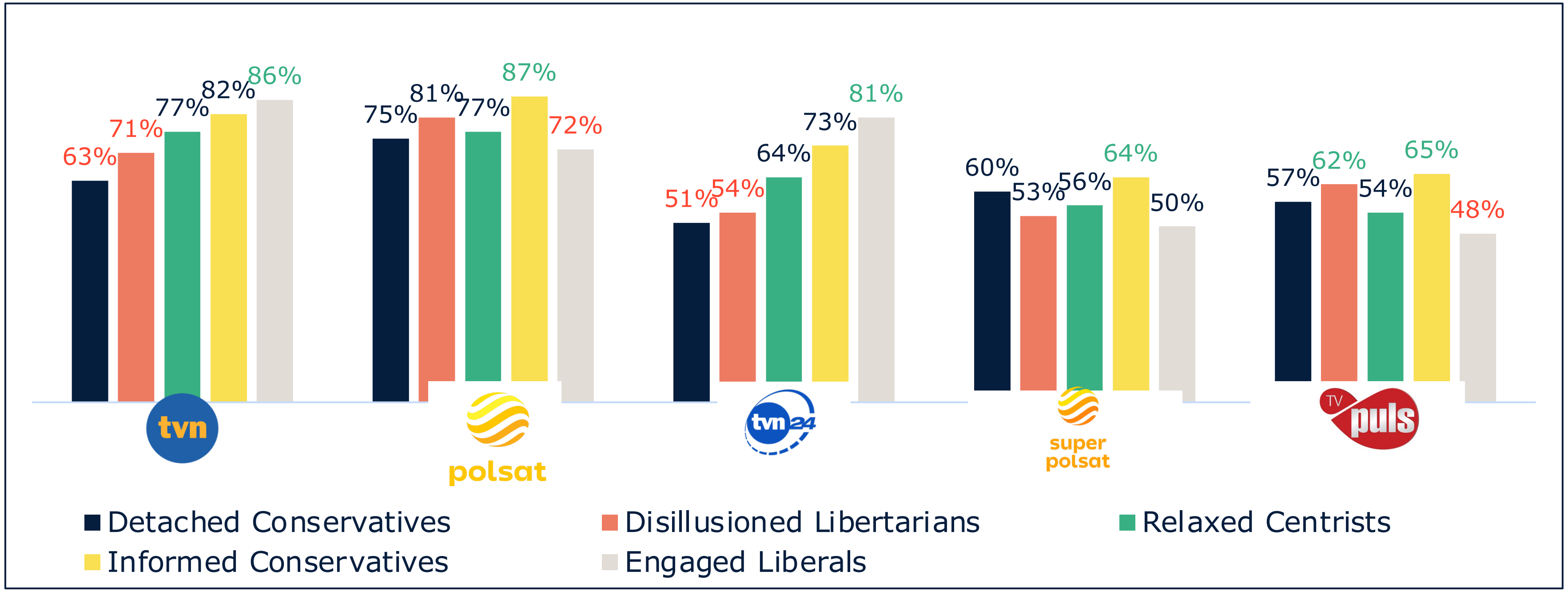
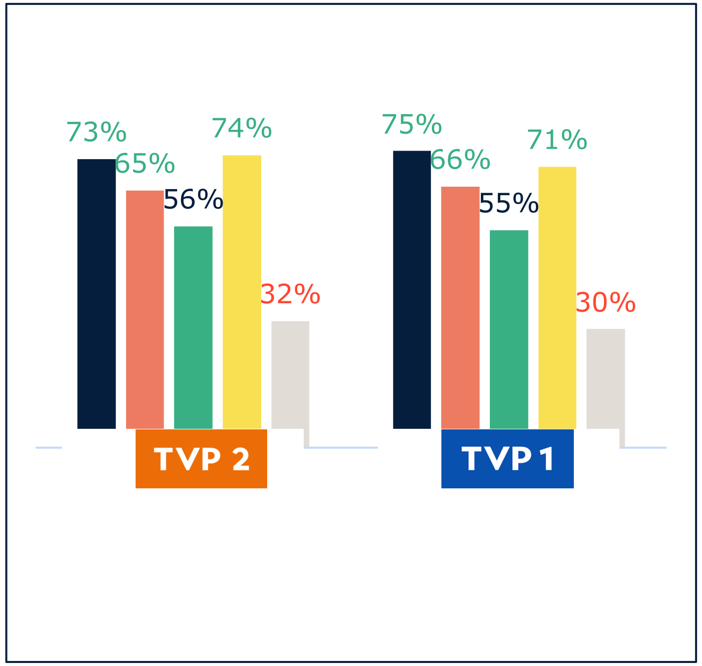
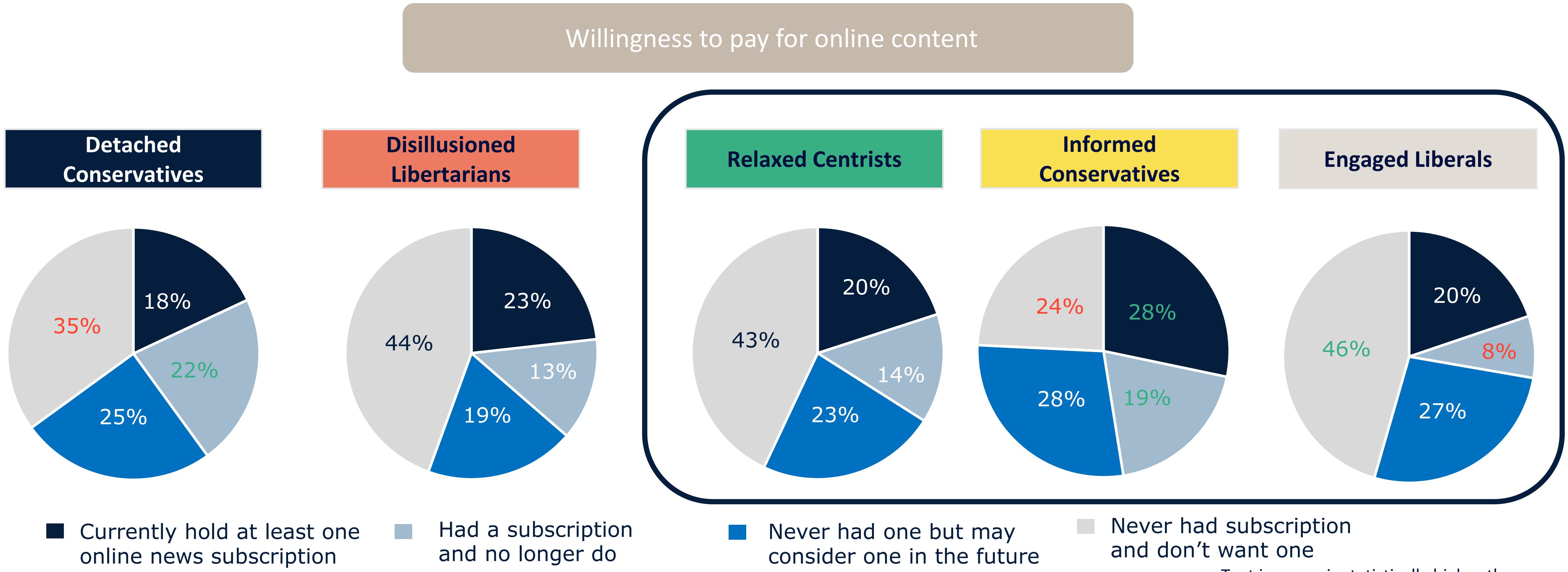




Q4. Typically how frequently do you watch these TV channels? Base: All those aware of at least one TV channel. Varies by TV channel

Deep dive 2: Willingness to pay for media

Overall, nearly half of respondents either currently hold a paid subscription or are likely to have one in the future. Informed Conservatives are most likely to pay.



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

Q14. Which of the following statements best describes your willingness to pay for content from online news sources? Base: All (2017), Detached Conservatives (361), Disillusioned Libertarians (273), Relaxed Centrists (434), Informed Conservatives (260), Engaged Liberals (677)

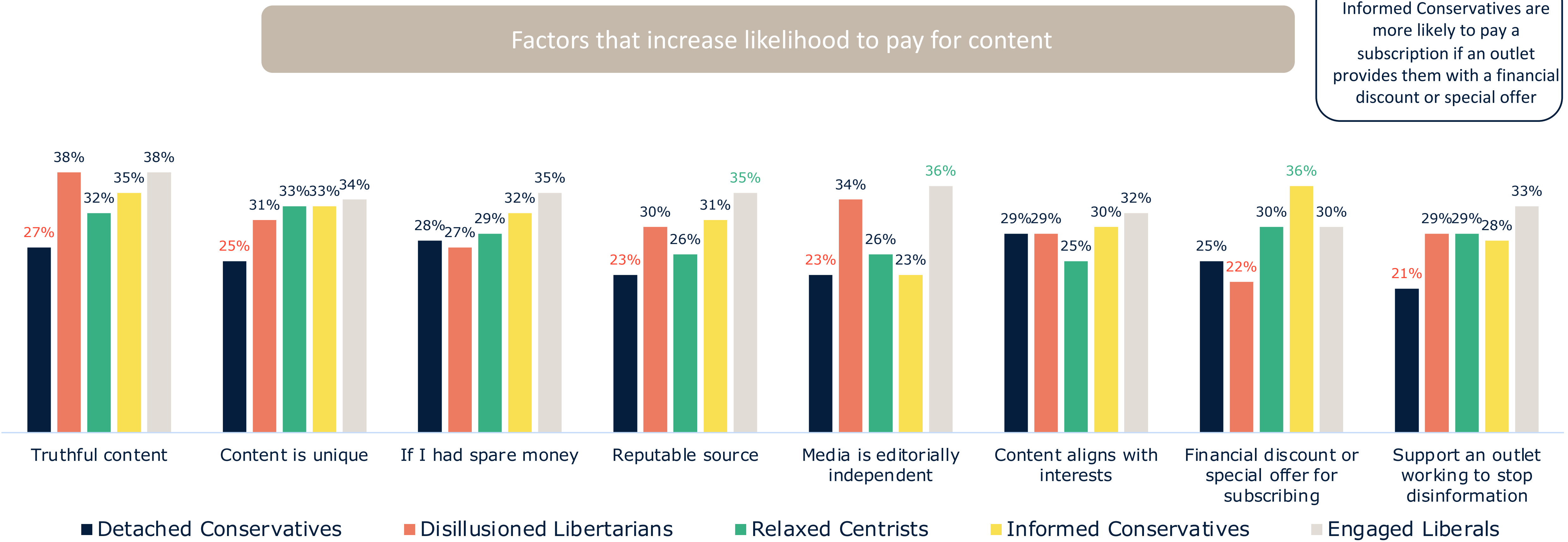
Informed Conservatives are also the most likely to engage in some media-related activities now and in the future

Willingness to pay	TOTAL	Detached Conservatives	Disillusioned Libertarians	Relaxed Centrists	Informed Conservatives	Engaged Liberals
Payment for content (Past)						
Subscribed to a free trial of a media outlet	29%	27%	27%	31%	35%	26%
Purchased merchandise from an outlet	22%	25%	18%	20%	29%	21%
Made a financial donation to help support an online news source that did not have a paywall	12%	16%	10%	12%	15%	9%
Attended an event held by media outlets	11%	13%	9%	13%	14%	9%
None of these	45%	38%	50%	44%	32%	52%
Prefer not to say	3%	4%	5%	3%	5%	2%
Payment for content (Future)						
Subscribe to a free trial of a media outlet	31%	25%	29%	28%	37%	36%
Purchase merchandise from an outlet	26%	29%	25%	28%	30%	22%
Make a financial donation to help support an online news source that does not have a paywall	13%	16%	13%	14%	15%	11%
Attend an event held by media outlets	18%	17%	20%	20%	20%	16%
None of these	33%	29%	36%	36%	26%	36%
Prefer not to say	7%	8%	5%	6%	7%	7%

Q17. Which of these have you done in the past? Q18: And which of these are you likely to do in the future? Base: All (2017), Detached Conservatives (361), Disillusioned Libertarians (273), Relaxed Centrists (434), Informed Conservatives (260), Engaged Liberals (677)

Truthful and unique content, as well as a reputable source, are key factors that make Poles more willing to pay for an online subscription

Informed Conservatives are more likely to pay a subscription if an outlet provides them with a financial discount or special offer



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

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 (1589), Detached Conservatives (295), Disillusioned Libertarians (211), Relaxed Centrists (346), Informed Conservatives (184), Engaged Liberals (542)

Financial burden and quality of content are the main factors leading to the ending of paid subscriptions

	Total	Top 5 reasons for cancelling a financial subscription to news outlets				
		Detached Conservatives	Disillusioned Libertarians	Relaxed Centrists	Informed Conservatives	Engaged Liberals
I am trying to reduce my cost of living	35%	24%	35%	30%	35%	58%
There is content of similar quality for free	30%	27%	27%	24%	29%	42%
There was not enough interesting content	23%	20%	31%	24%	14%	28%
It was not good value for money	22%	17%	11%	28%	17%	35%
The quality of the content decreased	21%	16%	25%	20%	18%	31%

Q16. Which, if any, of the below are reasons why you no longer pay to access content from online news sources? Base: All those, who had an online subscription and no longer do (276), Detached Conservatives (80), Disillusioned Libertarians (36), Relaxed Centrists (58), Informed Conservatives (49), Engaged Liberals (53)

Deep dive 3: Trust

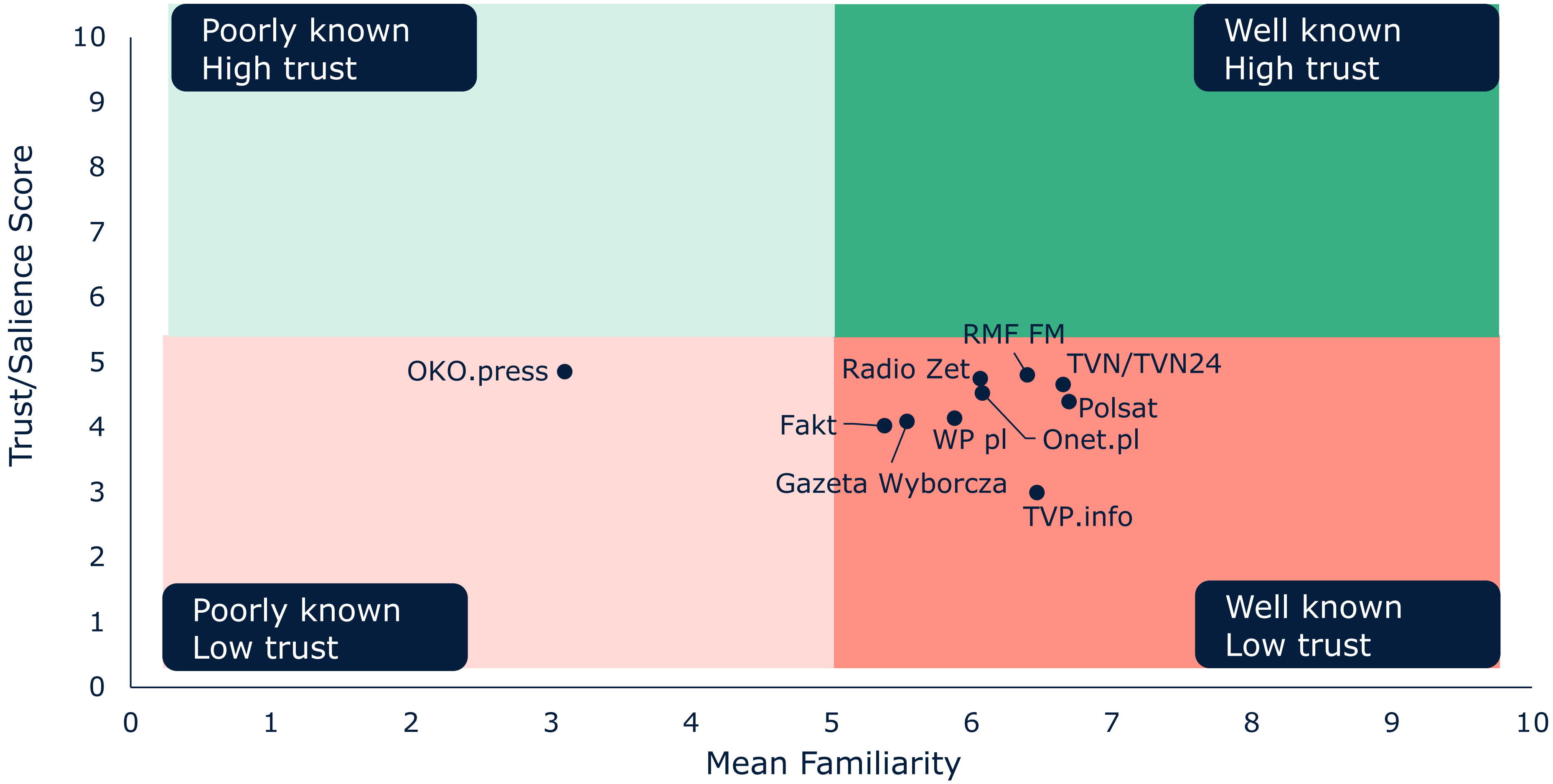
Measuring organisational trust

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.

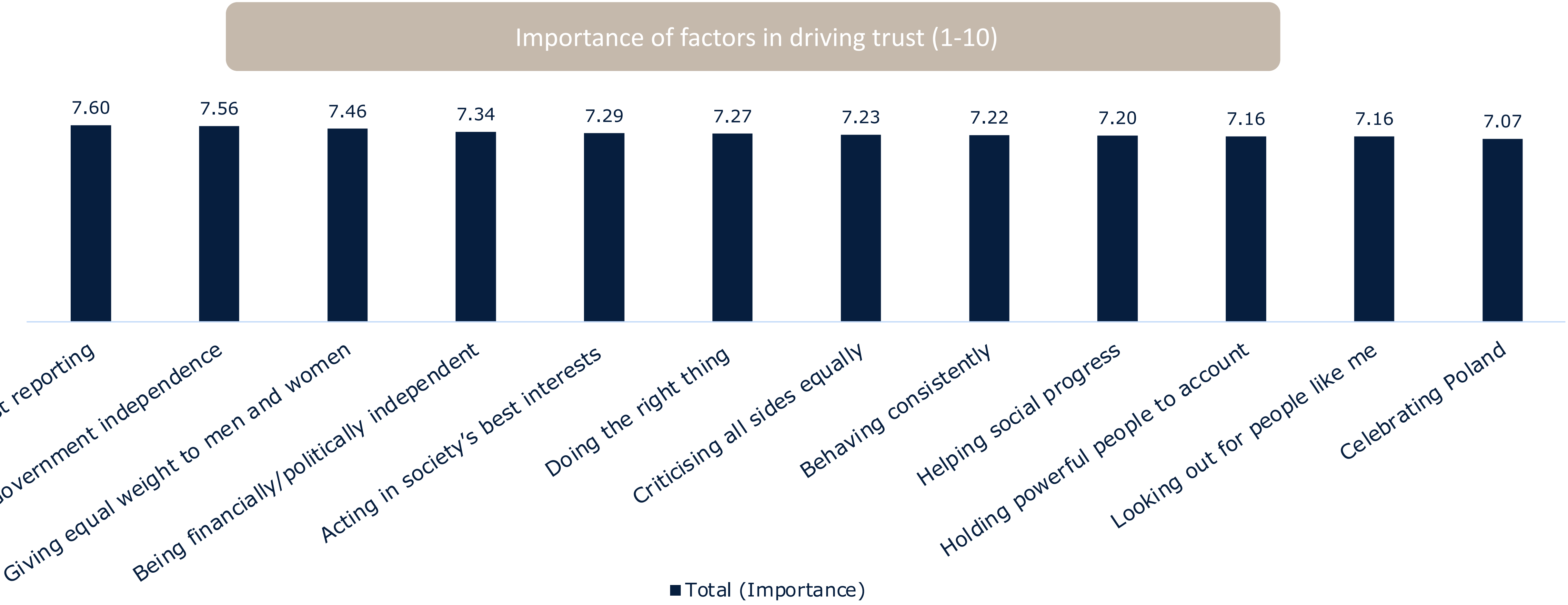
By contrast, a high degree of familiarity combined with a low trust/salience score (e.g. in the top left of the following quadrants) suggests an organisation that is poorly perceived by those who know it. These organisations will struggle to build trust unless they understand what trust drivers to focus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

Overall, well known independent media organisations struggle to convert familiarity into trust in Poland



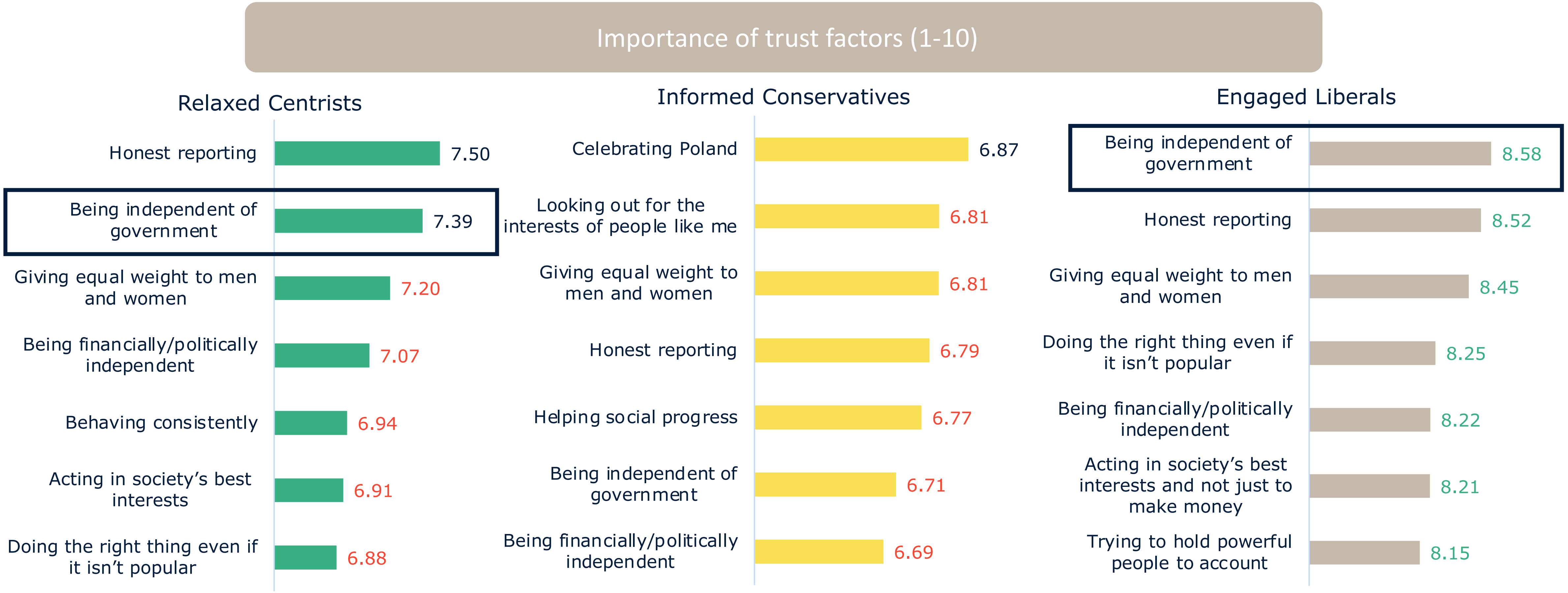
Q19. On a scale of zero to ten, how familiar are you with each of the following? Base: All. Q21. On a scale of zero to ten, how important are each of the following to you when deciding if an organisation is trustworthy? Q.20 How would you rate the performance of each on the following? Base: Those aware of outlet at Q19. Varies by outlet

Honest reporting, independence from the government, and providing equal rights to both genders are key drivers of trust



Q21. On a scale of zero to ten, how important are each of the following to you when deciding if an organisation is trustworthy?

While *honest reporting* and *giving equal weight to men and women* are important to all target clusters, Engaged Liberals and Relaxed Centrists believe *independence* is key for trust



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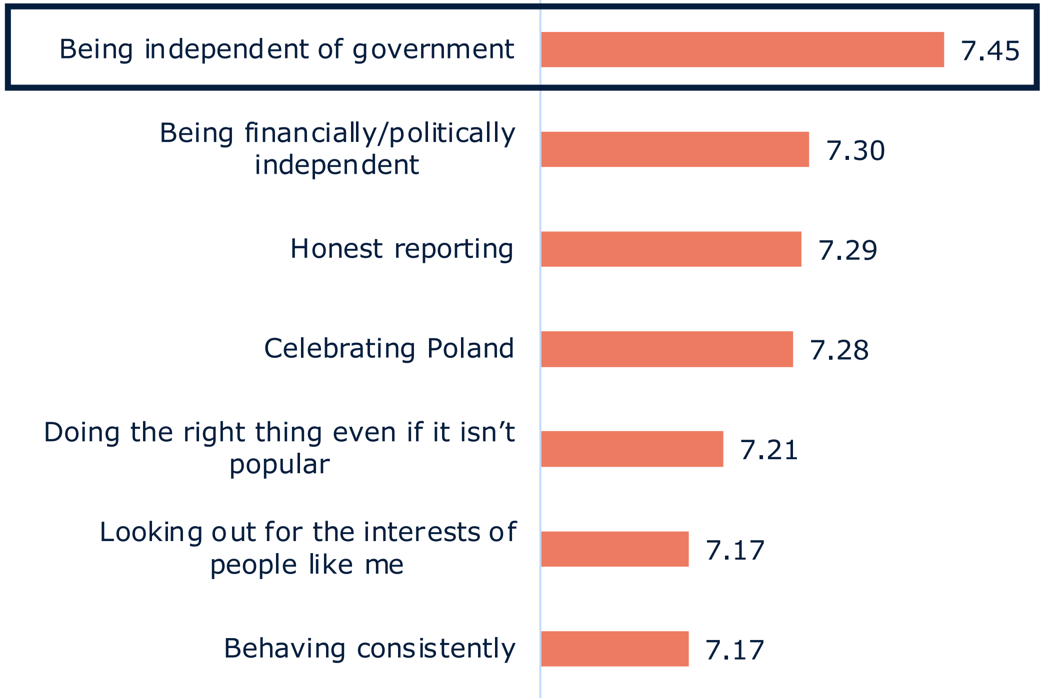
Q21. On a scale of zero to ten, how important are each of the following to you when deciding if an organisation is trustworthy? Base: Relaxed Centrists (434), Informed Conservatives (260), Engaged Liberals (677)

Both harder-to-reach groups say *honest reporting* and *celebrating Poland* are important for trust. Disillusioned Libertarians also believe *independence from government* is key

Importance of trust factors (1-10)

Detached Conservatives

Disillusioned Libertarians



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: Detached Conservatives (361), Disillusioned Libertarians (273)

Deep dive 4: What content do people want?

Most Poles claim they're interested in engaging with a mix of hard and soft content …

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

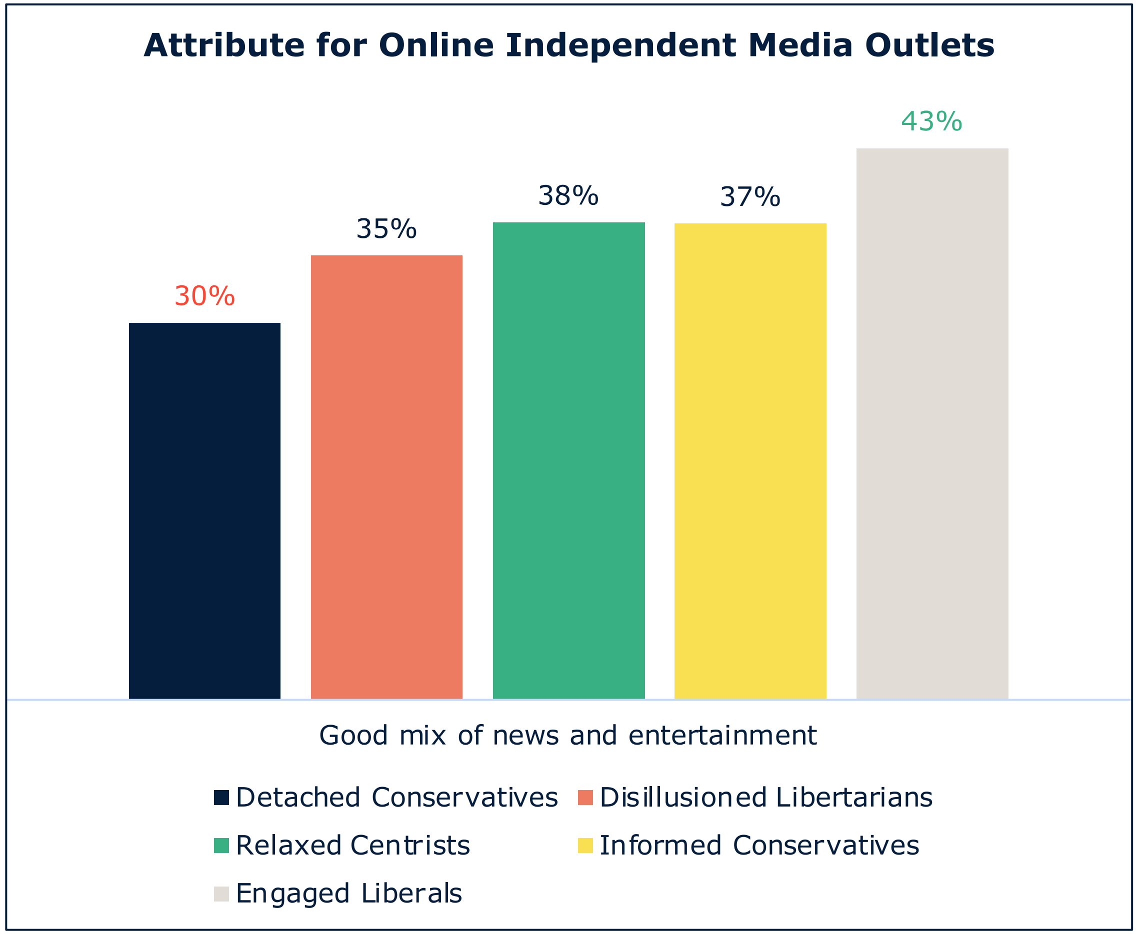
When asked about preferred type of content, aggregated top answers reveal that all Poles want:

1. **70%** Light entertainment (e.g. Celebrity news, Dramas)
2. **66%** Recreation (travel and sport)
3. **64%** News

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 (2017), Detached Conservatives (361), Disillusioned Libertarians (273), Relaxed Centrists (434), Informed Conservatives (260), Engaged Liberals (677)

…But less than half describe popular independent outlets as delivering a good mix of news and entertainment



Q12. Which of these attributes do you associate with these online news outlets? Base: All those who read the outlet at least multiple times per week. Varies by outlet. Numbers shown are aggregates from individual channels

Specifically, most groups share an interest in national and local news, as well as in content relating to health and travel

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

Detached Conservatives

1. Local News (38%)
2. Health (37%)
3. Science & Tech (37%)
4. National News (37%)
5. Travel (35%)

Disillusioned Libertarians

1. Science & Tech (46%)
2. Local News (42%)
3. Hobbies (41%)
4. Health (39%)
5. Historical programmes (39%)

Relaxed Centrists

1. Health (41%)
2. Travel (41%)
3. National News (39%)
4. Hobbies (39%)
5. Local News (38%)

Informed Conservatives

1. Health (40%)
2. National News (39%)
3. Hobbies (37%)
4. Sport (36%)
5. Travel (35%)

Engaged Liberals

1. National News (44%)
2. Travel (43%)
3. Health (41%)
4. Local News (40%)
5. European News (39%)

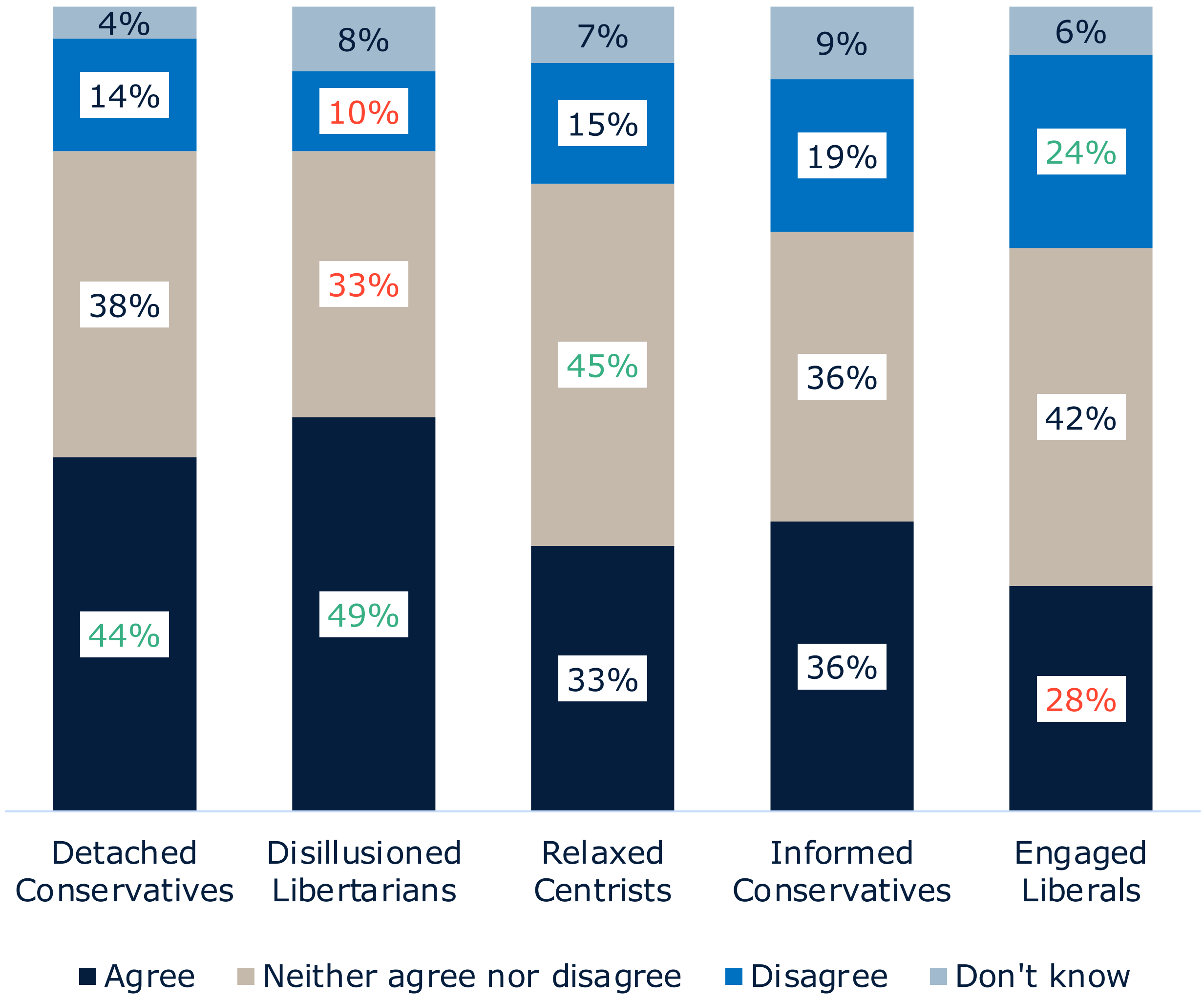
Text in green is statistically higher than average; text in red is statistically lower

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 (2017), Detached Conservatives (361), Disillusioned Libertarians (273), Relaxed Centrists (434), Informed Conservatives (260), Engaged Liberals (677)

Deep dive 5: Attitudes towards media

1 in 3 Poles overall 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 or disagree with the following statements? I do not often see my views reflected in the media. Base All (2017), Detached Conservatives (361), Disillusioned Libertarians (273), Relaxed Centrists (434), Informed Conservatives (260), Engaged Liberals (677)

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

Most Poles think that media impartiality is important to them - this is especially true for Engaged Liberals

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

Detached Conservatives	Disillusioned Libertarians	Relaxed Centrists	Informed Conservatives	Engaged Liberals
75%	79%	80%	74%	90%

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 (2017), Detached Conservatives (361), Disillusioned Libertarians (273), Relaxed Centrists (434), Informed Conservatives (260), Engaged Liberals (677)

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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 largest cluster (33% of total participants). They are well-educated and are financially comfortable. They have the highest % of over 55+, and while half of this group work full time, they are more likely to be retired than other clusters (24%).

Political orientation

They are the most pro-EU group, with 95% of respondents in this group supporting Poland's integration with the EU and they are more likely to identify with being European than any other group. Most view the influence of the government and the Catholic Church on the media as negative.

Cognitive Openness

As this group tends to have a rather objective view of the truth, and only a third of them believe to be more informed than most, they are relatively cognitively open.

Media Exposure

This cluster shows the highest awareness, engagement and trust in independent media compared to all other groups.

84% of this cluster think that the EU has a positive influence on the media in Poland

99% access at least one independent outlet on a weekly basis

Engaged Liberals and partner outlets

Why they matter

- This group has been identified as currently being the easiest target for independent media, given they already have **higher levels of awareness, engagement and trust** in independent outlets compared to the other groups.
- This group values media impartiality the most and does not think it is appropriate for politicians to own media.
- **Independence from the government is important** to increase trust among this group. This group is also the biggest in the sample and nearly half of it is willing to pay for online news content.

How to win them over

- **Reach them:** This cluster mainly consumes content on TV, social media and online news sites. Compared to other clusters they like to engage with content by reading articles and by following social media threads and comments.
- **Engage them:** This group mainly wants to consume more content about national news. They are also more likely than other clusters to favor news about European affairs.
- **Gain their trust:** Independence from the government and honest reporting are the two most important trust drivers for this group.

Informed Conservatives: Full profile

Key Demographics

This cluster is the smallest of all groups (13%). Respondents in this group are mostly male (57%) and are more likely to be aged between 18-34, although they are still mostly middle-aged. This group has a moderate level of education.

Political orientation

This cluster is disproportionately likely to think that Poland should align its values more closely with the Catholic Church in future. They are also more likely to identify with being Polish, but also with those who are from their region and are a member of their religion. They are predominantly socially conservative and think that the government should have more control over the economy.

Cognitive Openness

While a third of this group believes to be more informed than most, nearly half believe truth to be a relative concept. This makes them slightly cognitively closed and more resistant to changing their mind compared to other groups – however not to an extreme extent.

Media Exposure

They have high awareness and engagement for independent outlets – in line with the sample average.

45% think that being a member of their religion is very important to their identity

1/3 of this cluster currently hold a financial subscription and may consider one in future

Informed Conservatives and partner outlets

Why they matter

- This cluster already has h**igh levels of awareness, engagement and trust** for independent outlets. There are very few independent outlets that this group is strongly aware that have low levels of engagement.
- This group also shows the biggest willingness to pay for an online news subscription, given almost a third of this cluster currently own a **financial subscription (28%)** and even more say that they are likely to **subscribe to a free trial in future (37%)**.
- While they are the most likely to view the influence of the Polish government and Catholic Church as positive, they also hold **positive views of the influence of the EU**, **USA and NGOs** on media in Poland.

How to win them over

- **Reach them:** This cluster engages frequently with different media types – they are more likely than most to engage with social media, online news sites and streaming platforms multiple times a week.
- **Engage them**: This cluster prefers to consume a mix of lighter content and national news. This cluster can be motivated to pay for content if they are offered a financial reward for doing so, or if they know that others like themselves are already accessing that content
- **Gain their trust:** They under-index on all trust factors compared to other clusters, but above all identify celebrating Poland as the most important factor for increasing trust. The second most important trust factor is that outlets look out for the interests of people like themselves.

Relaxed Centrists: Full profile

Key Demographics

This cluster is mostly female (62%) and aged between 35-54 (48%). This group has mid-level education, in line with the national average. They are financially comfortable.

Political orientation

This cluster holds a rather centrist position on Poland accelerating its integration with the EU, while being also more centrist than other groups on social, economic and political topics. They mostly identify with being Polish more than anything else and are the least likely to identify with those who share their political ideals.

Cognitive Openness

This cluster is fairly cognitively open, as they are less likely than other clusters to think that they are better informed than others and are as likely as the other groups to believe that truth is a relative concept. These two factors make them particularly favourable to changing their views.

Media Exposure

This cluster has pretty high awareness and engagement with independent outlets – in line with the national average.

82% of this cluster are centrist on EU integration

37% don't know with whom Poland's values should align with

Relaxed Centrists and partner outlets

Why they matter

- This group already has a high level of awareness and engagement with independent media, and **nearly a quarter (23%) of this group is willing to pay** for an online news subscription in the future.
- Most of this cluster think that the **Polish government (70%) and the Catholic Church (65%) have a negative** effect on the media, while the majority perceive the influence of the EU on the media to be positive (58%).
- This group is also one of the **firmest believers in media impartiality (80%)**, and one of the least opposed to media receiving financial support from abroad.

How to win them over

- **Reach them:** Most respondents in this group tend to engage with Social media, TV and online news sites at least multiple times per week. This cluster mainly consumes content by reading articles and watching short-form videos.
- **Engage them**: This cluster prefers content relating to health, travel and hobbies, as well as national news. 1/3 are also interested in content for women, which is more than all other clusters.
- **Gain their trust:** This cluster is motivated to trust outlets that **demonstrate honest reporting and independence from the government.**

Disillusioned Libertarians: Full profile

Key Demographics

Most respondents in this cluster are aged between 35-54, with an even split between younger and older age brackets. Most of this cluster works full time and has completed secondary education. They also report an average financial status.

Political orientation

This cluster reports mostly conservative views on social, political and economical issues. While they are the most likely group to think that men and women should have the same roles in society, they are also most likely to believe there are too many migrants in Poland and that the government should have less control over the economy. They want Poland to reverse its integration with the EU (60%) and they have negative views about the Polish government (63%) and the Catholic Church (59%).

Cognitive Openness

This cluster is the most cognitively closed off, as they are more likely than others to think they are better informed than most and that ‘truth’ is relative, making them unlikely to be receptive to information that contradicts their existing worldview.

Media Exposure

This cluster has slightly lower awareness levels of independent media compared to other groups, and they don’t engage with any specific outlet more than other clusters. This group is the most likely to not see their views reflected in the media.

49% of this cluster thinks that their views are not reflected in the media

Disillusioned Libertarians and partner outlets

Why they matter

- **This group is disillusioned with the current media environment,** as nearly half claim that they don't see their views reflected in the media (49%). This makes it more likely that they seek new media platforms to engage with.
- Most respondents in this group think **media should be impartial (79%)** and most are **opposed to ownership by politicians (75%)**.
- Although trust levels are generally low for this cluster, there is still an opportunity to instill trust among this group by demonstrating **government independence**. This cluster also claims that **knowing media is independent** and **content is truthful** is likely to **increase their willingness to pay** for a subscription.

How to win them over

- **Reach them:** Most respondents in this group engage with TV, Social media and news sites at least multiple times per week. Most of this cluster consumes content by reading articles.
- **Engage them:** This cluster shows a preference for informative content such as science & technology, health and historical programmes. They also show interest in local news.
- **Gain their trust:** Independence from the government, financial and political independence, and honest reporting are key drivers for creating trust among this cluster.

Detached Conservatives: Full profile

Key Demographics

This cluster is mostly male (56%) and is mostly aged between 35-54 (it is evenly split between the younger and older age brackets). Most of this cluster has completed secondary education (61%) and works full time (55%). This group mostly identifies with being Polish and compared to other groups is most likely to identify with those of their religion.

Political orientation

This group holds rather centrist and conservative attitudes regarding various social, political and economical topics. This group is more likely than target groups to want Poland to reverse its integration with the EU (30%) - however, most respondents are centrist about it (65%). This group is also more likely than other groups to hold a positive view of the government and a negative view of the EU.

Cognitive Openness

This cluster can be considered rather cognitively open. Only one third believe they are more informed than most (45% neither agree nor disagree) and they are less likely than others to think that truth is a relative concept.

Media Exposure

This cluster has the lowest levels of awareness of the most popular independent outlets among all of the groups, while also reporting the highest engagement levels with state-owned outlet TVP.info.

62% of this cluster think that it is not appropriate for media in Poland to be owned by foreign individuals or companies

Detached Conservatives and partner outlets

Why they matter

- This cluster is **more cognitively open than others** and might be prone to changing their views about the media. This can constitute an opportunity for outlets, with which the group is not currently engaging with, to form a new brand image.
- This cluster makes up nearly a fifth of the entire sample and **a quarter of them claims they are open to having a paid online news subscription in the future**, as long as content aligns with their interests.
- Although to a lesser extent than other groups, most respondents in this cluster believe **media impartiality** is important and say **honest reporting** and **criticising all sides equally are key trust drivers.**

How to win them over

- **Reach them:** Most respondents in this group are likely to engage with TV and Social media at least multiple times per week. They are the least likely to consume content via following threads and reading comments, and also under-index on online news sites and their apps.
- **Engage them**: This cluster is mostly interested in local and national news, as well as in content relating to health, science & tech, and travel.
- **Gain their trust:** This cluster under-indexes on all trust factors, but celebrating Poland, reporting honestly, criticising all sides equally and defending traditional values are key trust drivers for this group.