ZINC
NETWORK

Media consumption in Romania

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

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01 Methodology

Methodology in detail

Online Methodology

Online quantitative survey
40 questions in total

Representative of Romania

Sampled and weighted to be representative of Romania by **age, gender, region** in line with census data. Weighting efficiency is 99.02 %

Fieldwork in early 2023

24th February – 3rd March 2023

Research Questions

1

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

2

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

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

3

Who is most willing to **pay** for online news?

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

- 2,012 respondents in total
- Online quota sampling
- Sampled and weighted to be representative of Romania by **age**, **gender**, **region**, in line with census data
- Weighting efficiency: 99.02%

NB: Percentages in the report are based on weighted totals

48%	Male
52%	Female
26%	18-34 years old
47%	35-54 years old
28%	55+ years old
27%	Live in southern Romania (including Bucharest)

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**
	Romania should **accelerate/reverse** its integration with the EU	Scale 1-7 (1=accelerate;7=reverse)
	Whether Romania should **increase its intake of Ukrainian refugees**/There are **too many Ukrainian refugees** in the country	Scale 1-7 (1=increase;7=too many)
	Influence on the media in Romania	
	Whether the EU has a **positive/negative** influence on the media in Romania	Scale 1-5 (1=very positive;5=very negative)
	Whether the government of Romania has a **positive/negative** influence on the media in Romania	Scale 1-5 (1=very positive;5=very negative)
	Cognitive Openness	
	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 of the media organisation.

- 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 Romania, three segments of the population have been identified as being more open to independent media and have therefore been labelled as potential target audiences.** These groups are either currently more aware and engage with independent media more, or they are cognitively more open to doing so.

2. **Awareness and engagement are currently not key challenges for independent media – getting people to pay for online content is.** While Romanians are currently more familiar and are more likely to engage with independent outlets compared to non-independent ones, less than one in five currently hold an online news subscription. One of our target audiences is even less likely to hold one.

3. To drive media payment, independent media outlets will need to focus on demonstrating the **truthfulness of their content**, showcase their efforts in **stopping disinformation,** and build a **strong brand reputation –** key factors for driving media payment according to target groups. To stop people from cancelling existing subscriptions, online outlets will also need to prioritise delivering **desirable and unique content** that aligns with audiences’ interests.

4. **Independent media need to further boost trust among Romanians and build a strong brand reputation.** While independent media outlets are currently described as more trusted than their non-independent counterparts, popular independent media platforms are still slightly underperforming on key trust drivers and have not gained Romanians’ full trust. Independent media outlets will need to focus on proving honest reporting, acting in society’s best interests, and their independence from the government if they want to build a trusted reputation with Romanians.

5. **Independent media outlets should consider delivering more content related to health, science, technology and both local Romanian and European news,** as these have been identified as the most desired types of content in Romania, particularly among key target groups. Additionally, outlets can take inspiration from TV to create more inclusive and appealing content, given it is currently the most popular and least divisive media platform among Romanians.

03 Clusters in detail

Our 5 groups in a nutshell

Less open to independent media → More open to independent media

20% Disengaged Conservatives	23% Informed Conservatives	21% Curious Centrists	15% Open-minded Europeans	21% Engaged Liberals
Oldest group	Mostly middle-aged	Youngest of groups	Mostly middle-aged	Mostly middle-aged
Lowest education level	High education level	Mid education level	High education level	Highest education level
Low Income	Moderate Income	Moderate Income	Moderate Income	Good Income
More likely to identify as being Romanian more than anything else	Most likely to identify as being Romanian, European, of the same gender, region, age	Identifies with being Romanian more than anything else	Most likely to identify as European and with those sharing political ideals	Identifies with being European more than anything else
Against EU integration	Pro-EU integration	Centrist on EU integration	Pro-EU integration	Pro-EU integration
Socially Conservative	Socially Conservative	Socially Centrist	Socially Liberal (except for Church and gender)	Socially Liberal
Most view government influence on media as negative	Half view influence of government on media as negative	Half view government influence on media as positive	Most view government influence on media as positive	Most to view government influence on media as negative
Least media-engaged group	Most media-engaged group	Most willing to engage in media-related activities in the future	High trust in media	Least engaged in non-independent media
More open-minded	Slightly cognitively closed	Slightly cognitively closed	More open-minded	Most cognitively closed

More details in Appendix

Based on their current and prospective relationship with media, we've identified 3 target audiences – these constitute roughly 57% of the Romanian population

	% of those Highly exposed to non-independent	Awareness of online news outlets	Engagement with online news outlets	Trust in media	View on media impartiality	% of those willing to pay for media
Disengaged Conservatives (20%)	32%	More aware of **independent**	Higher for independent but **lowest engagement of all groups**	**Slightly lower trust overall**; Similar trust levels for independent and non-independent	More likely than other groups to not see their views reflected in the media	35%
Informed Conservatives (23%)	24%	Highest awareness of **independent**	Higher engagement for independent; **but highest engagement for non-independent of all groups**	High trust for all outlets; **Similar trust levels** for independent and non-independent	Most likely among groups to believe media should be impartial and respect the authorities	44%
Curious Centrists (21%)	20%	More aware of **independent**	Higher engagement for **independent**	**Similar trust levels** for independent and non-independent	Believe media should be impartial but less than other groups	50%
Open-minded Europeans (15%)	21%	More aware of **independent**	Higher engagement for **independent**	High trust for all outlets; **Higher levels trust for independent outlets**	Believe media should be impartial and respect the authorities	52%
Engaged Liberals (21%)	15%	Highest awareness of **independent**	Higher engagement for independent; **Lowest for non-independent**	High trust for independent outlets; **Lowest trust levels for non-independent**	Most likely to believe media should be impartial and not owned by politicians	39%

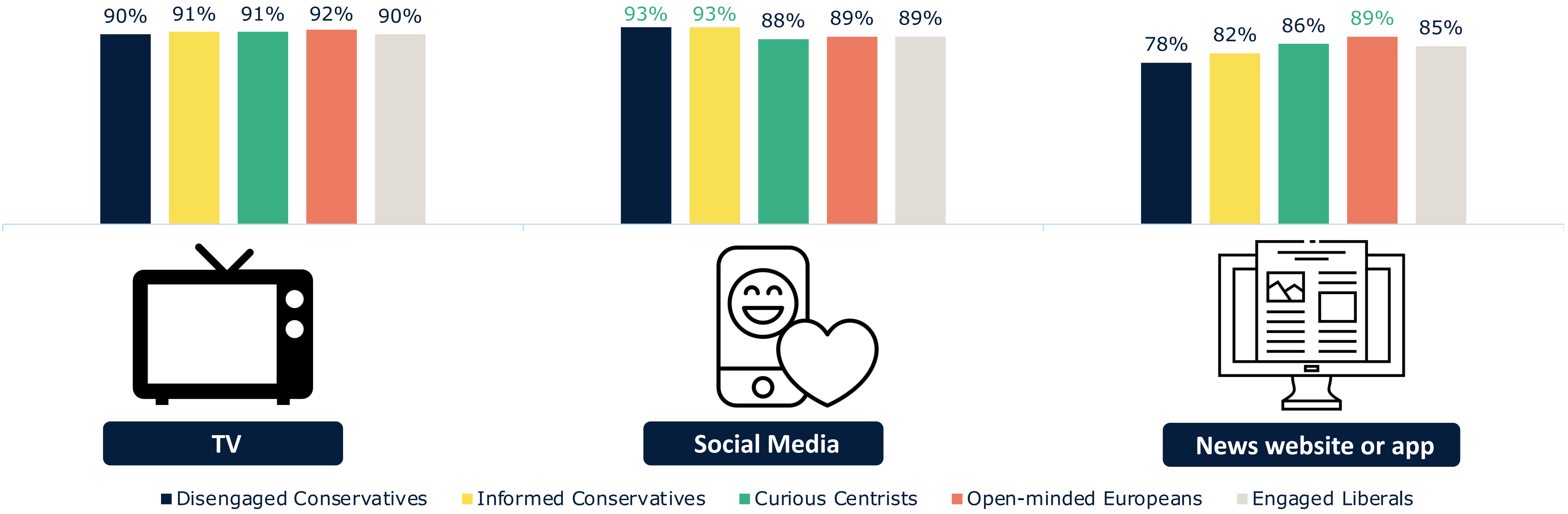
04 Findings in detail

Deep dive 1: Current media consumption

Most Romanians engage with TV, social media and news websites/apps at least multiple times per week

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

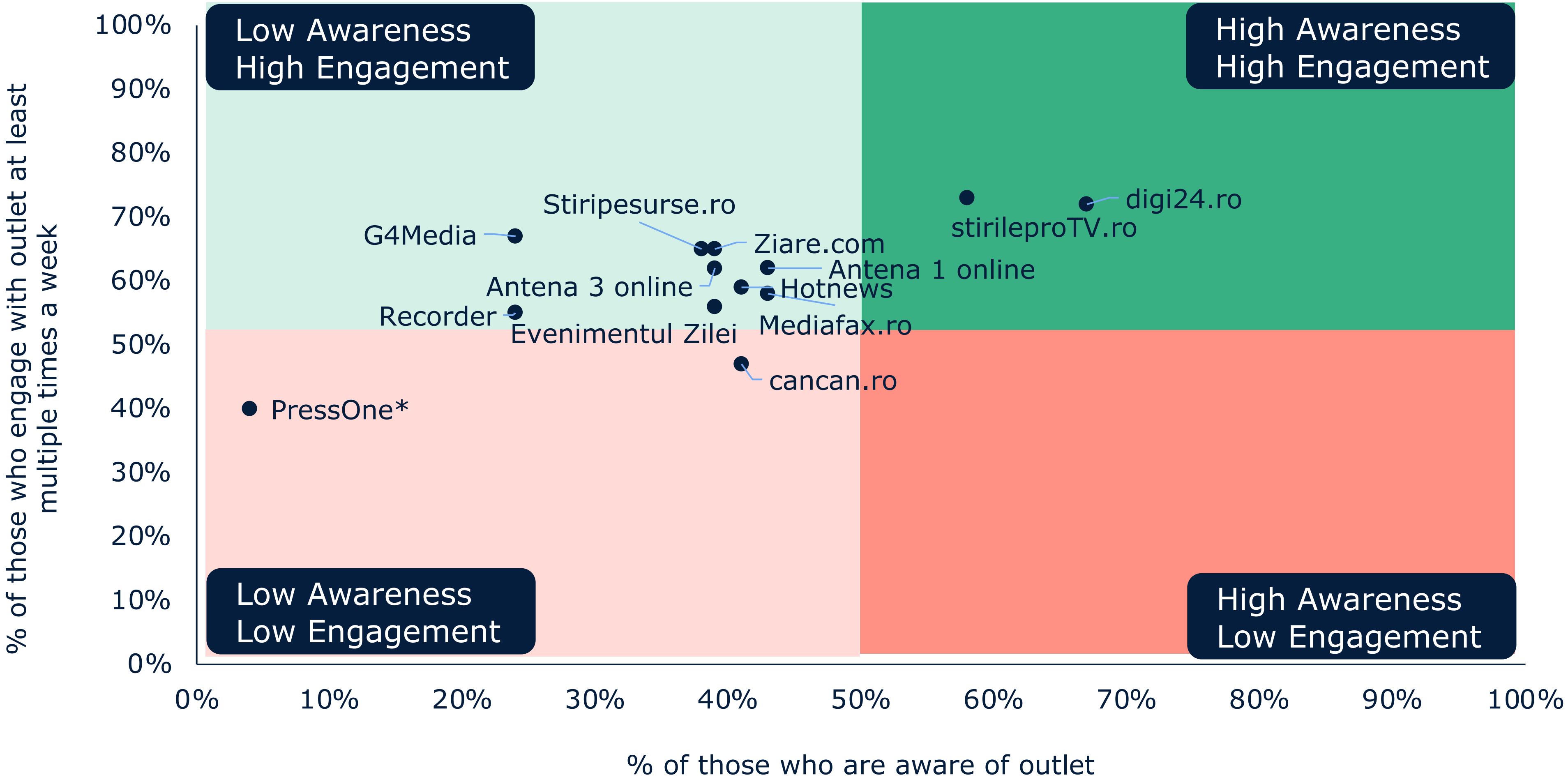
NB: Online figures may have been influenced by online methodology



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 (2012), Disengaged Conservatives (391), Informed Conservatives (471), Curious Centrists (419), Open-minded Europeans (296), Engaged Liberals (422)

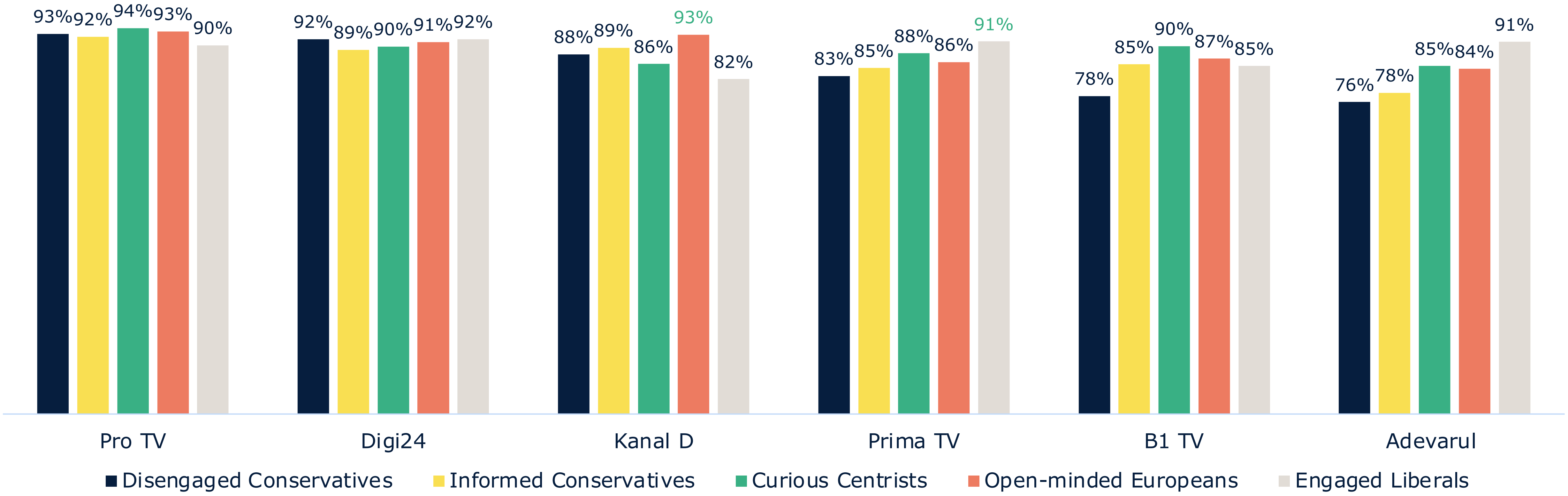
Digi24 and Stirile ProTV are the most known and engaged with outlets in Romania



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

Regarding TV, all groups have elevated engagement levels with a range of channels

Of those who access: % of those who access at least multiple times a week

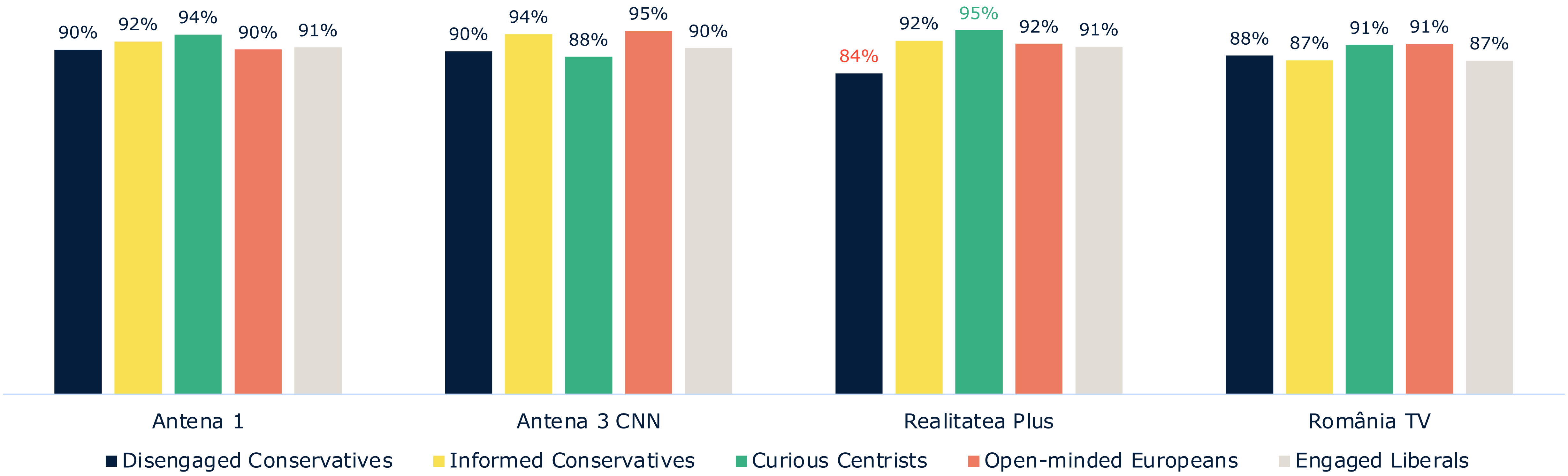


Text in green is statistically higher than average; text in red is statistically lower

Q4. Typically how frequently do you watch these TV channels? Base: All those aware of TV channel at Q3. Varies by TV channel

Regarding TV, all groups have elevated engagement levels with a range of channels

Of those who access: % of those who access at least multiple times a week

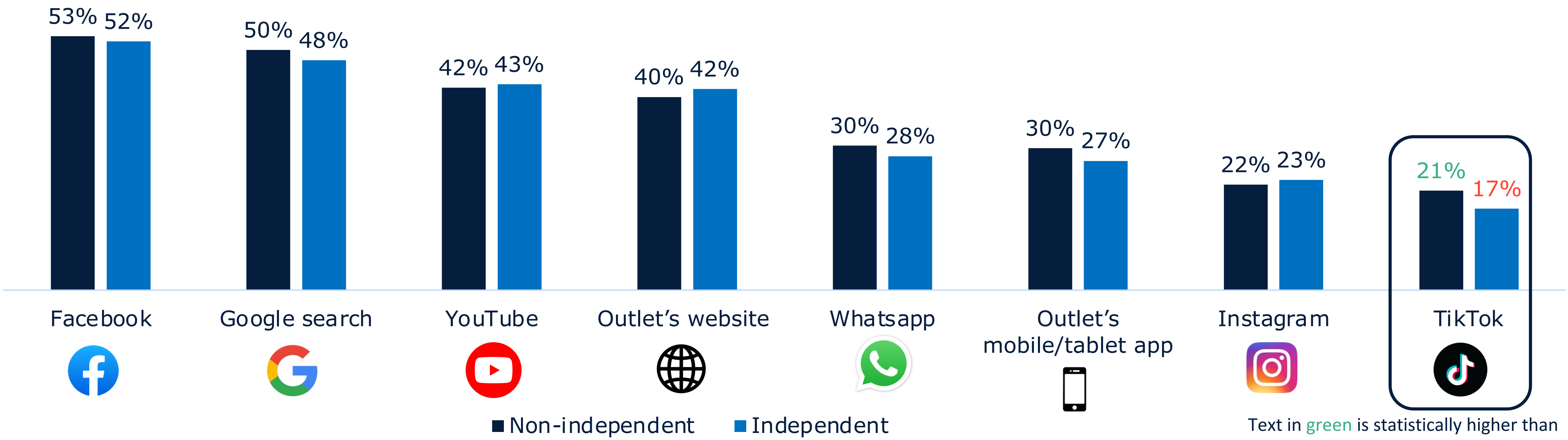


Text in green is statistically higher than average; text in red is statistically lower

Q4. Typically how frequently do you watch these TV channels? Base: All those aware of TV channel at Q3. Varies by TV channel

While most platforms are used to the same extent for both types of news, TikTok is used to access non-independent media outlets more than independent

Platforms used to access outlets at least multiple times a week

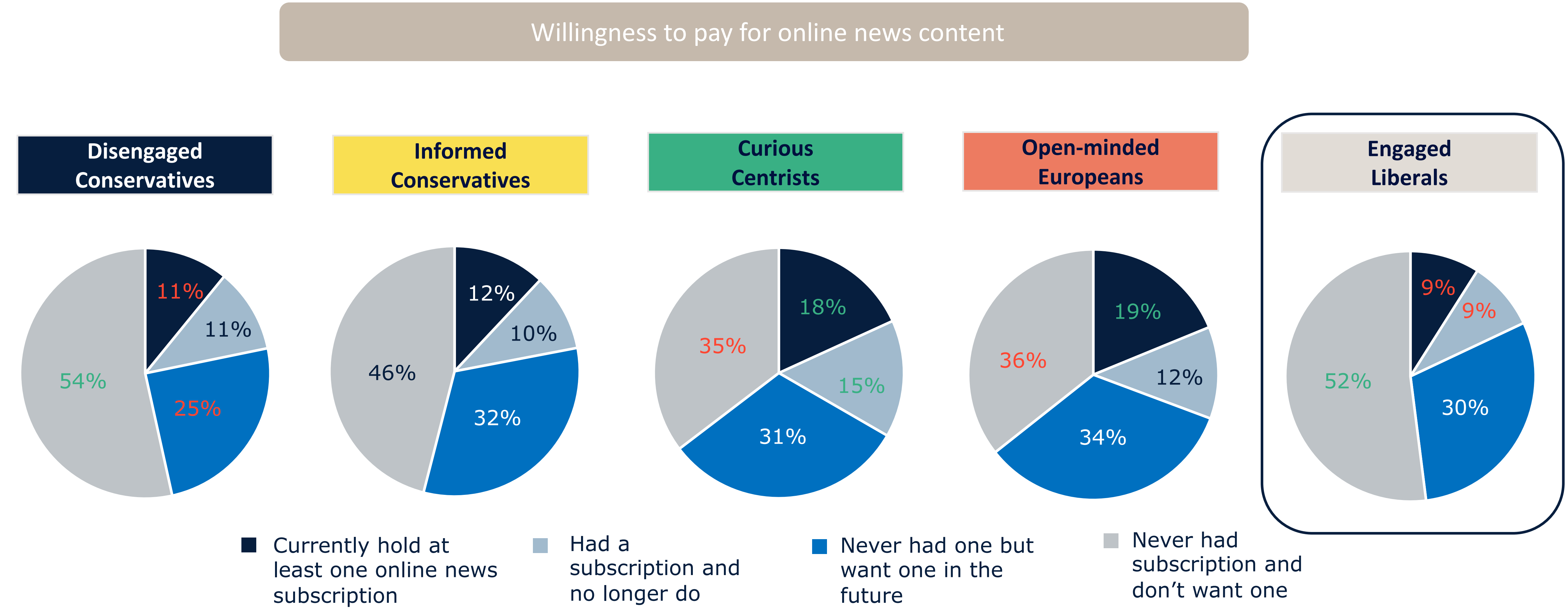


Text in green is statistically higher than average; text in red is statistically lower

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: Those who use at least one online news outlet site/app at least multiple times a week. Varies by outlet

Deep dive 2: Willingness to pay for media

Willingness to pay for online news content remains low across all groups, especially for our easiest target

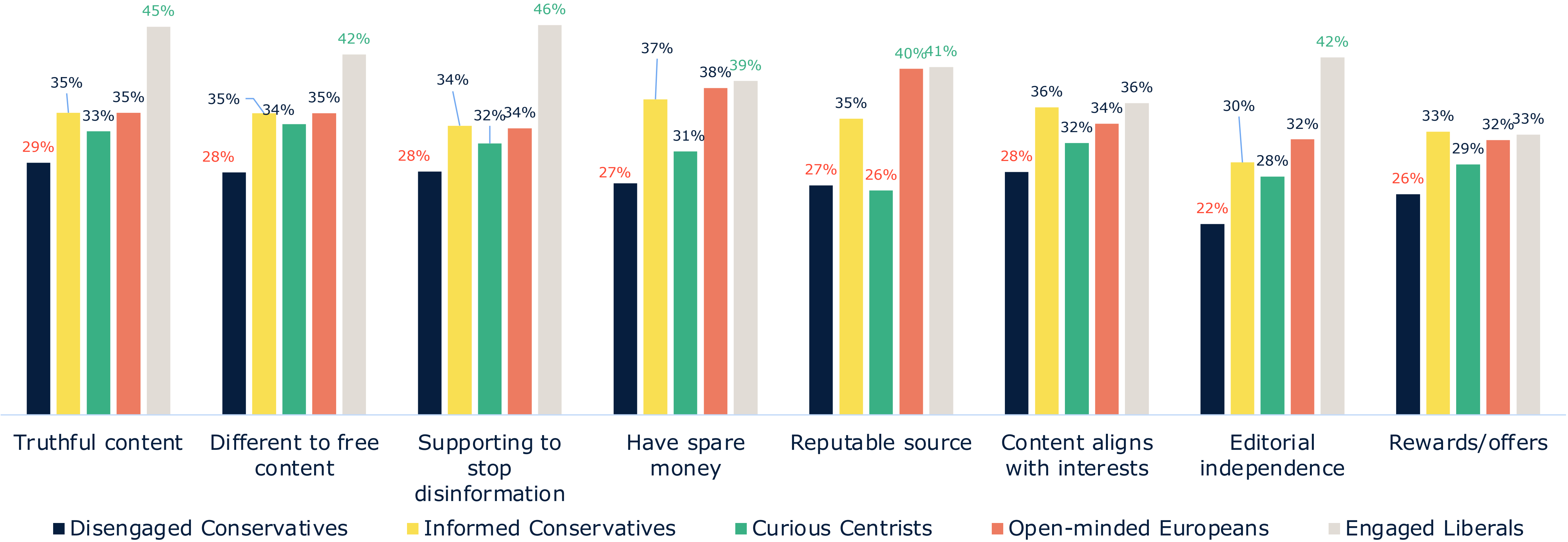


Text in green is statistically higher than average; text in red is statistically lower

Q14. Which of the following statements best describes your willingness to pay for content from online news sources? Base: All (2012), Disengaged Conservatives (391), Informed Conservatives (471), Curious Centrists (419), Open-minded Europeans (296), Engaged Liberals (422)

Truthful and unique content, as well as stopping disinformation, are some of the key drivers of payment

Factors that increase likelihood to pay for content



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: Those that currently don't hold a subscription (1742), Disengaged Conservatives (350), Informed Conservatives (413), Curious Centrists (342), Open-minded Europeans (241), Engaged Liberals (383)

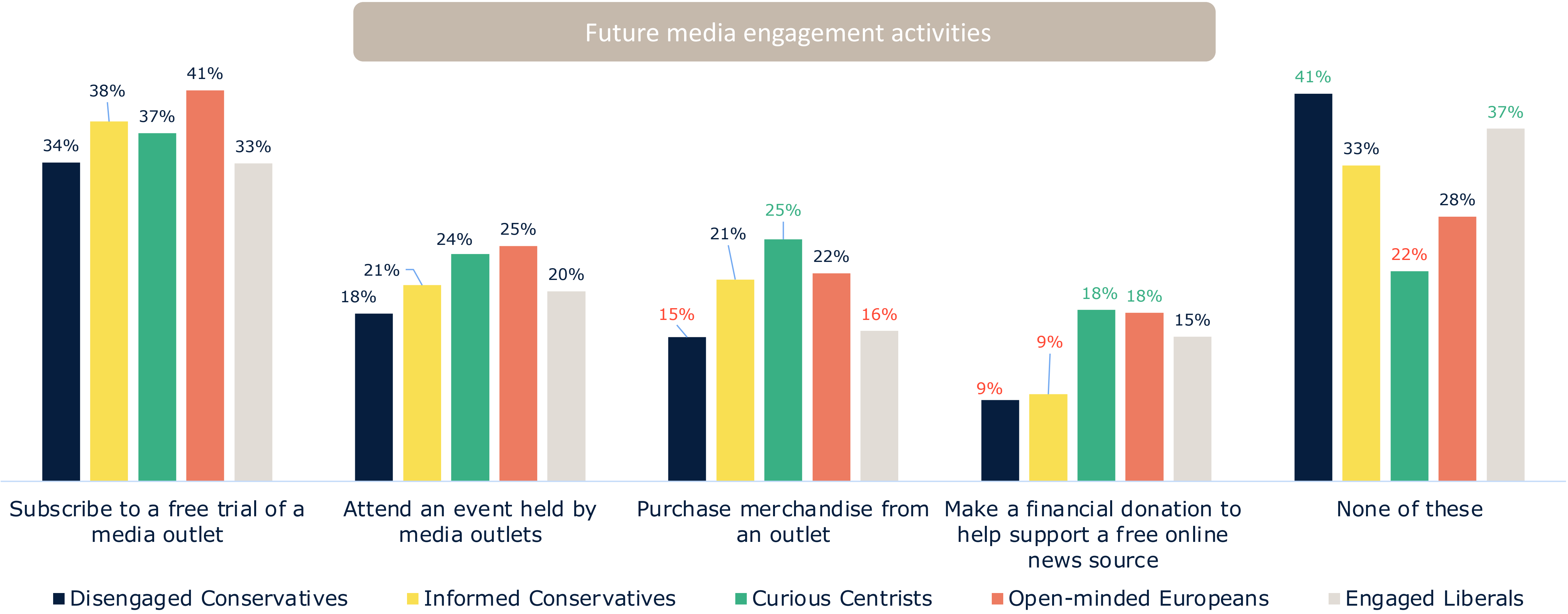
While quality of content and financial burden are the main factors that lead to the ending of paid subscriptions

	Total	Top 5 reasons for cancelling a financial subscription to news outlets				
		Disengaged Conservatives	**Informed Conservatives**	**Curious Centrists**	**Open-minded Europeans**	**Engaged Liberals**
There is content of similar quality for free	30%	27%	45%	17%	34%	32%
The quality of the content decreased	25%	30%	25%	21%	17%	33%
I am trying to reduce my cost of living	24%	21%	32%	17%	20%	30%
It was not good value for money	23%	16%	26%	24%	25%	25%
There was not enough interesting content	19%	23%	13%	18%	25%	19%

NB: Groups EL and O-ME all have base sizes below 40

Q16. Which, if any, of the below are reasons why you no longer pay to access content from online news sources? Base: Those that had a subscription in the past and no longer do (225), Disengaged Conservatives (43), Informed Conservatives (45), Curious Centrists (65), Open-minded Europeans (36), Engaged Liberals (36)

Compared with paid subscriptions, more Romanians are willing to subscribe to a media outlet free trial

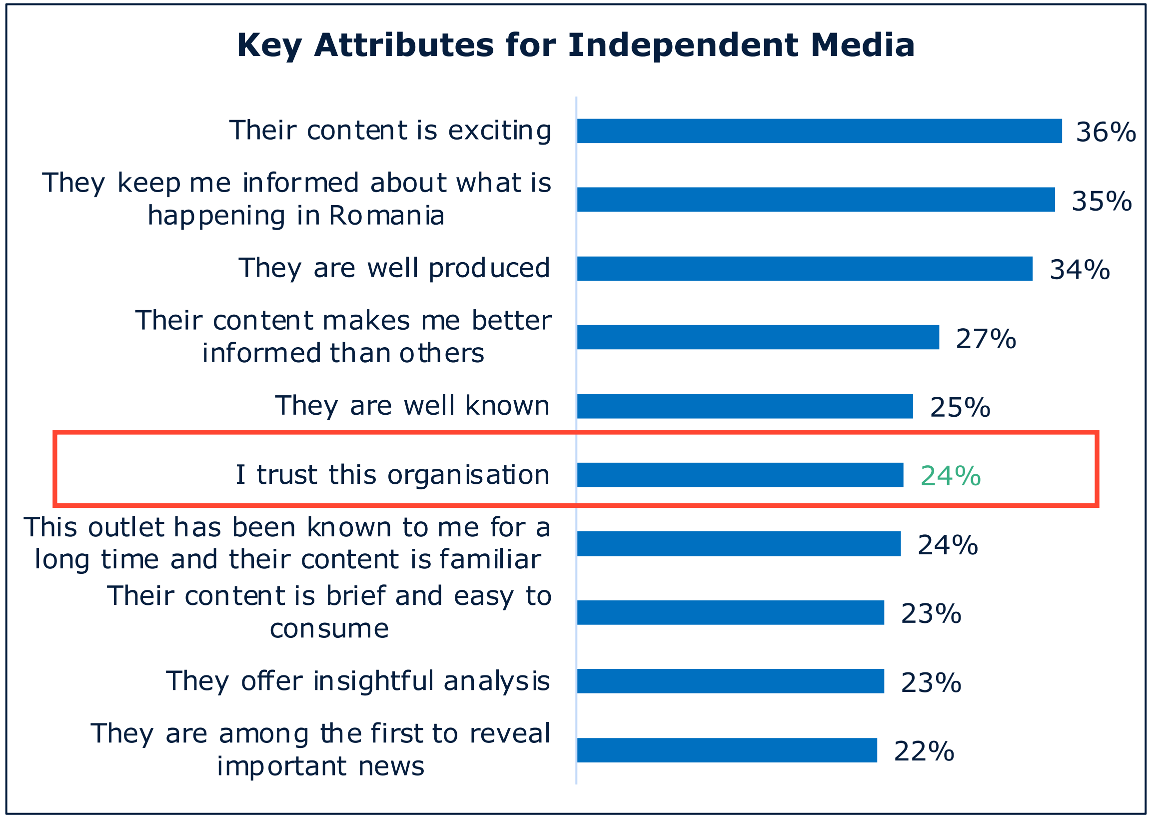


Text in green is statistically higher than average; text in red is statistically lower

Q18. Which of these are you likely to do in the future? Base: All (2012), Disengaged Conservatives (391), Informed Conservatives (471), Curious Centrists (419), Open-minded Europeans (296), Engaged Liberals (422)

Deep dive 3: Trust

Although low overall, trust is significantly attributed more to independent media than to non-independent

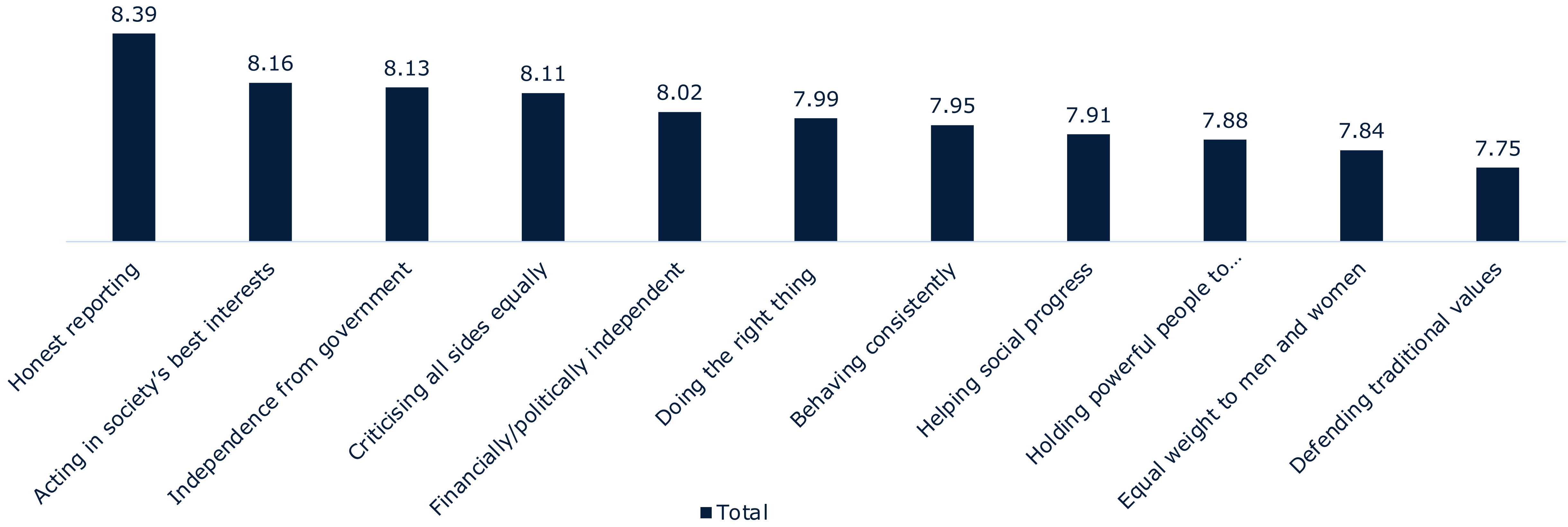


Text in green is statistically higher than non-independent
Text in red is statistically lower than independent

Q12. Which of these attributes do you associate with these online news outlets? Base: Those who use at least one online news outlet site/app at least multiple times a week. Varies by outlet

Honest reporting, acting in society's best interests, and independence from the government are key drivers of trust

How important are these factors to determining if an organisation is trustworthy? (1-10)



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 Those aware of organisation at Q19. Varies by outlet

Deep dive 4: What content do people want?

All groups share an interest in seeing more content that relates to health, science and technology. Target groups also want more European and national news

Top 5 content types each group wants more of

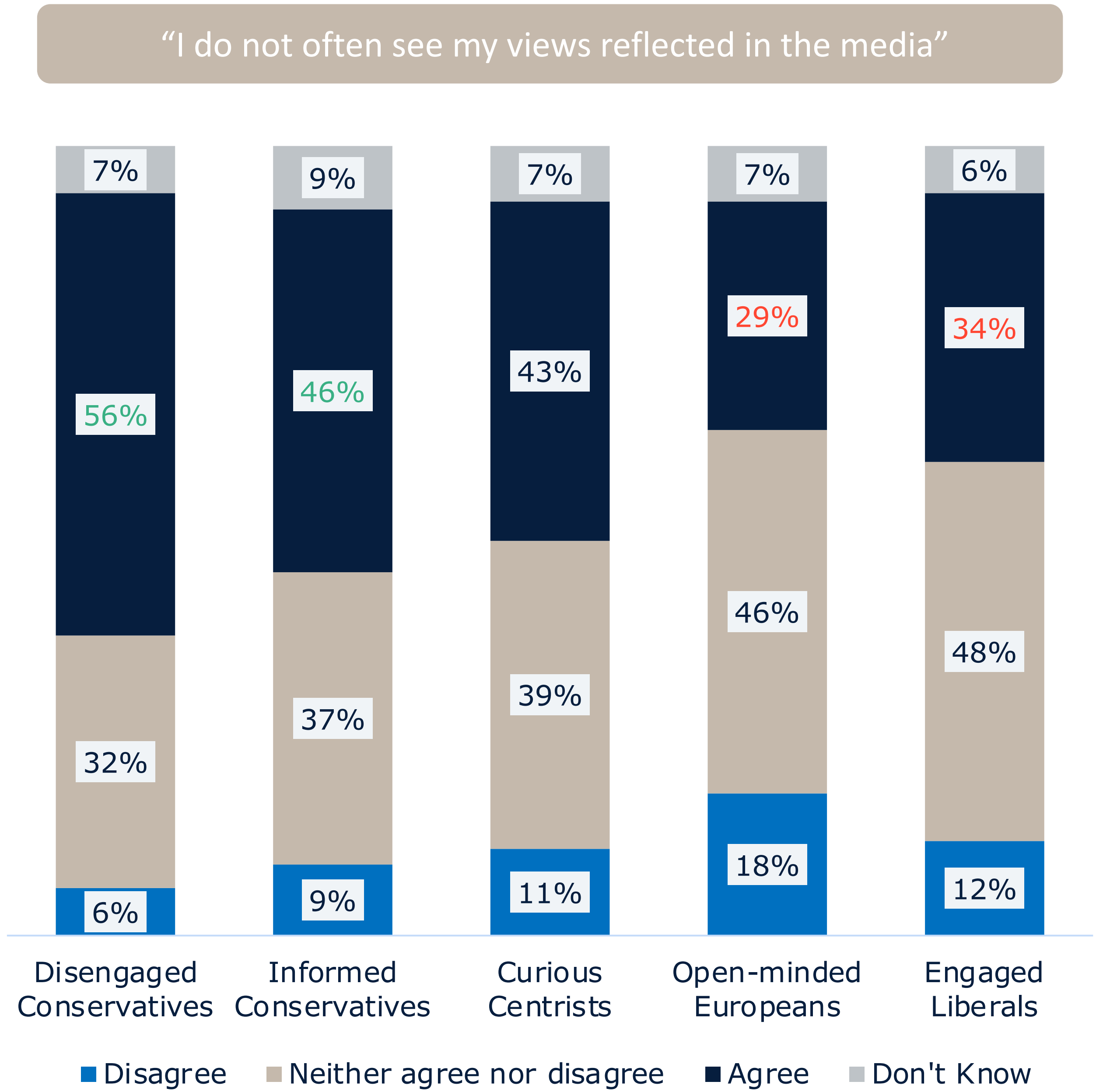
1. **Health (49%)**	1. **Health (55%)**	1. **Health (53%)**	1. **Health (57%)**	1. **Science & tech (55%)**
2. Travel (41%)	2. Comedy shows (45%)	2. Travel (45%)	2. **Science & tech (50%)**	2. **Health (51%)**
3. **Science & tech (40%)**	3. Education programmes (45%)	3. **Science & tech (43%)**	3. National news (48%)	3. European news (50%)
4. National news (39%)	4. Local news (45%)	4. Education programmes (37%)	4. European news (44%)	4. National news (49%)
5. Education programmes (39%)	5. **Science & tech (45%)**	5. European news (36%)	5. National economy (42%)	5. Travel (48%)

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 (2012), Disengaged Conservatives (391), Informed Conservatives (471), Curious Centrists (419), Open-minded Europeans (296), Engaged Liberals (422)

Deep dive 5: Attitudes towards media

Four out of ten Romanians do not often see their views reflected in the media they are consuming



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" : Base: All (2012), Disengaged Conservatives (391), Informed Conservatives (471), Curious Centrists (419), Open-minded Europeans (296), Engaged Liberals (422)

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

Most Romanians agree that media should be impartial

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

Disengaged Conservatives	Informed Conservatives	Curious Centrists	Open-minded Europeans	Engaged Liberals
79%	86%	71%	79%	86%

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 (2012), Disengaged Conservatives (391), Informed Conservatives (471), Curious Centrists (419), Open-minded Europeans (296), Engaged Liberals (422)

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 cluster constitutes 21% of the overall sample. Respondents in this group are predominantly middle-aged and have the highest levels of education and income.

Political Orientation
Compared to most groups, this cluster expresses more liberal views on all topics – including those relating to the role of the Church, the promotion of family values, and gender equality. Although they show slightly more centrist views regarding immigration, they're position is still more liberal than that of most groups.

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, which makes changing their point of view more difficult.

Media Exposure
This group shows the lowest exposure to non-independent media and the highest levels of awareness for independent media. While their level of engagement with independent media is average, they show the lowest engagement and trust levels for non-independent media. They value media impartiality the most and are the cluster that perceives influences from the Romanian government and Romanian businesspeople as most negative.

76% engage with independent media at least multiple times per week

86% say it's important that the media they engage with is impartial

Engaged Liberals and independent outlets

Why they matter	How to win them over
• This group is currently the **easiest target for independent media.** They are currently the most aware of independent media and the least likely to engage with or trust non-independent media • They are also the biggest believers in **media impartiality** and the most **opposed to media ownership on behalf of politicians** • 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 engaging with types of media that **don't align with their views and expectations**	• **Reach them:** This group engages with TV, social media and online news sites and apps at least multiple times per week • **Engage them:** Compared to other groups, this cluster wants more content relating to science and technology, news about Europe and Romania, as well as travel. Similarly to all other clusters, they want more content on health • **Gain their trust:** They believe that *honest reporting* and *being financially and politically independent of the government* are key trust drivers for organisations

Open-minded Europeans: Full profile

Key Demographics

This groups is the smallest one, making up nearly 15% of the overall sample. It is mostly middle-aged and has a moderate level of both education and income (in line with the rest of the sample).

Political Orientation

This group demonstrates mostly liberal views regarding both immigration and economic policy. They are slightly more conservative when it comes to promoting family values but less than other groups. Compared to other clusters they are slightly more conservative on gender roles and the role of the Church in public life. They are strongly in favour of accelerating Romania's integration with the EU.

Cognitive Openness

This cluster is rather cognitively open compared to the other liberal group, as respondents are less likely to believe they are more informed than others. Nearly half view truth as a subjective concept, which is in line with the sample average.

Media Exposure

This group shows medium exposure to non-independent media. They show the highest engagement for independent media, together with the Engaged Liberals cluster. They are also the most likely of groups to engage with online news sites and their apps as a media platform.

68% say being European is very important to their identity

91% view the influence of the EU on media as positive

Open-minded Europeans and independent outlets

Why they matter	How to win them over
• This group constitutes an easy target for independent media outlets, given they already have one of the **highest levels of engagement and trust** for independent media • Together with Curious Centrists, they are the **most likely to make a financial donation** to support free online news outlets • Among all groups they are **the most willing to pay** for online content, with over half claiming their either currently have a subscription, or are open to having one in the future	• **Reach them:** This group is the most likely to engage with online news sites and apps at least multiple times a week. Social media and TV remain their most used platforms, with nearly 90% using these on a weekly basis • **Engage them:** This group wants more content about health and science and technology. Compared to the other clusters, they are also more likely to favour content on Romanian and European news, as well as the Romanian economy • **Gain their trust:** They believe that *honest reporting* and *acting in society's best interests* are key factors in forming trust for organisations. They are the most willing to pay for content, as long as the content is aligned with their interests

Curious Centrists: Full profile

Key Demographics

This groups makes up roughly 21% of the overall sample. It is the youngest group of all and has a moderate level of both education and income (in line with the rest of the sample).

Political orientation

Compared to other groups, this cluster is more likely to express centrist views on all presented topics, including immigration, gender roles, climate change, and economic policy. While they are also the most centrist when it comes to Romania's integration with the EU, 73% believe Romania's values should align with those of the EU.

Cognitive Openness

While nearly half believe to be more informed than most (in line with the other groups), they are more likely than most groups to believe truth is a subjective concept. While this doesn't make the group necessarily more closed off to new information, they might be less likely to question its accuracy.

Media Exposure

This group has a medium exposure to non-independent media. They have average levels of awareness and engagement with both independent and non-independent media and as for all other groups, both are higher for independent media compared to non-independent.

78% show willingness to engage in at least one media-related activity in the future

1 in 2 are willing to pay for online news content

Curious Centrists and independent outlets

Why they matter

- This group is particularly interesting for independent media, as they show the greatest likelihood of engaging in media-related behaviours. They are **the most likely to have subscribed to a free trial**, to have **purchased merchandise** and to have **attended an event** from media outlets
- This group is also the **most likely to make a financial donation** supporting an online news source in the future, with nearly 1 in 5 saying they'd so so
- **Nearly half** also report **willingness to pay** for online news content

How to win them over

- **Reach them:** Similarly to all other groups, most engage with TV, social media and online news sites at least multiple times per week. However, respondents in this group are also the most frequent users of video and music streaming platforms, as well as radio podcasts
- **Engage them:** This group particularly wants content relating to health, travel and science and technology
- **Gain their trust:** This group believes *that honest reporting*, *criticizing all sides equally* and *acting in society's best interests* are the most important factors for organisations to form trust

Informed Conservatives: Full profile

Key Demographics

This cluster is the largest with 24% of the respondents in the sample. They are predominantly female, middle-aged and have a moderate financial status. They are also well-educated, lining up with the country average in terms of education.

Political orientation

Compared to other groups, this cluster is socially conservative, particularly in relation to immigration, family values and the Church, while being more liberal on economic policy. While most respondents in this group are in favour of a strong parliament, this cluster has the highest number of people that are in favour of a strong leader. They view the EU as an especially positive organisation and are strongly in favour of Romania's further integration with the EU.

Cognitive Openness

This group is regarded as quite cognitively closed as most respondents believe to be more informed than others (60%) and think that truth is a relative concept. This makes this group particularly resistant to changing their views.

Media Exposure

This group shows the highest awareness for both independent and non-independent media outlets. Even though, in line with all other clusters, engagement is higher for independent than non-independent, this group is somewhat exposed to non-independent media, with roughly 1 in 5 being highly exposed.

1 in 5 of this cluster are highly exposed to non-independent media

66% still view the influence of the government on media as negative

Informed Conservatives and independent outlets

Why they matter	How to win them over
• This group is one of the **most media engaged groups** throughout. Although they have the highest levels of engagement for non-independent media of all groups, their engagement for independent media remains higher • Most of this group (66%) views **the government's influence on media as negative**, which makes independent media appetible to them • This group also shows **high levels of trust** in media overall • 44% of respondents from this group show **willingness to pay** for online news content	• **Reach them:** Together with Disengaged Conservatives, they are the **most avid social media users**, with 93% claiming they access social media platforms at least multiple times a week. They also regularly use TV and online news sites • **Engage them:** This group wants more content relating to health and comedy. They are also interested in education programmes and local news • **Gain their trust:** This group believes that **honest reporting, independence from the government** and **criticizing all sides equally** are the most important factors for organisations to form trust

Disengaged Conservatives: Full profile

Key Demographics

This cluster makes up 20% of the overall sample. They are the oldest sample overall, with nearly one third (32%) aged over 55 years old. They have lower education levels and lower financial status compared to the other clusters.

Political orientation

While they show stronger conservative social attitudes than other groups, they are economically liberal, which might reflect their more difficult financial situation. Although this group is mostly in favour of a strong parliament rather than a strong leader as an ideal political system, it is highly opposed to Romania's further integration with the European Union. (Over half believe Romania should reverse its integration with the EU).

Cognitive Openness

This group is quite neutral when it comes to cognitive openness. While they don't consider themselves to be more informed than others, nearly half view "truth" to be a relative concept. This means people in this group might be more receptive to new information, while not necessarily prone to dismiss untruthful information.

Media Exposure

Although they are the most heavily exposed to non-independent media, they are more likely to be aware of independent news outlets than non-independent ones. Compared to other groups, they are the most likely to rate the influence of any organisation on the media as negative – especially that of the government and the European Union.

Over half believe Romania should reverse its integration with the EU

And over half say they don't often see their views reflected in the media

Disengaged Conservatives and independent outlets

Why they might matter

- This group is probably **the hardest to reach target** for independent media, as they are the least engaged, least willing to pay, least trusting and least favourable to the EU
- However, a majority (78%) of people in this group are still accessing **news sites/apps at least multiple times per week** and 70% are accessing independent media
- This group also rates the **influence of the government on the media particularly negatively** compared to other groups and strongly believes that it's **not appropriate for politicians to own media organisations**

How to win them over

- **Reach them:** Together with the other conservative group, they are the **most avid social media users**, with 93% claiming they access social media platforms at least multiple times a week. They also regularly use TV and online news sites, but to a lesser degree than other groups
- **Engage them:** This group wants more content relating to health, travel and science and technology. Regarding news, they seem to favor national news more than international
- **Gain their trust:** This group believes that honest reporting, acting in society's best interest and **independence from the government** are key in forming trust.