ZINC
NETWORK

Media consumption in Slovenia

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

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01 Methodology

Methodology in detail

Online Methodology

Online quantitative survey

16 minutes interview length

Incidence rate is 99%

Drop out rate is 14%

Country representative

2,034 Respondents

Representative of Slovenia by **age, gender, region, education** in line with census data.
Weighting efficiency is 89.38 %

Fieldwork in early 2023

24th February – 13th March 2023

Cluster analysis

K-means clustering

7 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 Slovenia?

2

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

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

3

Which groups are **more willing to pay** for online content?

What drives **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

- 2,034 respondents in total
- Online quota sampling
- Sampled and weighted to be representative of Slovenia by **age**, **gender**, **region**, **education** in line with census data
- Weighting efficiency: 89.38%

50%	Male
50%	Female
23%	18-34 years old
41%	35-54 years old
36%	55+ years old
52%	Live in Eastern Slovenia
48%	Live in Western Slovenia

Cluster methodology

Clustering Methodology	We conducted a k-means cluster analysis using 7 continuous variables, selected based on prior research and local expertise	
Key Variables	***Political Views***	**Response type**
	It is best to have **strong leader** who can take decisions without interference from parliament/**strong parliament** to hold government to account	Scale 1-7 (1=strong leader;7=strong parliament)
	Views on the media	
	The EU has a **positive/negative** influence on media	Scale 1-5 (1=positive;5=negative)
	The government has a **positive/negative** influence on media	
	It is not appropriate for politicians to own media organisations	Scale 1-5 (1=strongly disagree;5=strongly agree)
	It is not appropriate for media organisations in Slovenia to receive financial support from abroad	
	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	

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 Slovenia, 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 strongly value media independence and are against ownership by politicians.

2. **Awareness and engagement are two key challenges independent media is faced with in Slovenia.** Online media engagement levels in Slovenia are generally low for both independent and non-independent outlets. However, given awareness of independent outlets is even lower than for non-independent ones, independent outlets have a higher chance of building new brand reputations and engaging new audiences. They can draw on engagement learnings from high performing outlets including 24ur.com and rtvslo.sl.

3. **Paying for online content is also not popular in Slovenia.** Very few Slovenians, including those in target audiences, are currently paying for an online subscription. However, nearly 1 in 5 claim they’d be willing to pay for a subscription or sign up for a free trial in the future. To drive payment, outlets should deliver **truthful and unique content that aligns with their interests–** key factors for driving media payment according to target groups.

4. **Independent media need to further boost trust among Slovenians and build a strong brand reputation.** Media trust levels are low across all groups in Slovenia for both independent and non-independent media and key media organisations underperform on key trust drivers according to Slovenians. Lesser-known independent brands, including our partner outlets, have a better opportunity of forming a trusted relationship with new audiences by demonstrating honest reporting, government independence and impartial criticism.

5. **Independent media outlets should consider delivering more content related to science, technology and travel** as these have been identified as the most desired types of content in Slovenia, particularly among key target groups.

03 Clusters in detail

Our 5 groups in a nutshell

Less open to independent media → More open to independent media

Sceptics	Detached	Disillusioned Centrists	Hopeful Europeans	Engaged Liberals
19%	11%	20%	22%	28%
Equal gender split	Equal gender split	Slightly more female	Equal gender split	Equal gender split
Lower education level	Lowest education level	Average education	Slightly higher education	Highest education level
Lower income	Lower income	Mid income	More likely to speak English	Identify as European and Slovenian
Identify mostly with being Slovenian	Identify mostly with being Slovenian	Identify mostly with being Slovenian	Identify as European and Slovenian	Most liberal of all groups
Socially conservative	Centrist/Conservative	Centrist/Liberal on EU integration	More liberal than other groups	Pro-EU integration
Against EU integration	Centrist on EU integration	Most likely to believe media impartiality factors as important	Pro-EU integration	Highest engagement and trust in independent media
Most likely to view all organisations' influence on media as negative	Least likely to believe that impartiality factors are important	Low trust in media	Average media engagement but higher levels of trust	
Low media engagement				

More details in Appendix

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

	Awareness of online news outlets	Engagement with online news outlets	Trust in media	View on media impartiality	% of those willing to pay for media (now or future)
Sceptics (19%)	Average awareness of both independent and non-independent	Average engagement with independent and non-independent	Lowest trust in media overall	Nearly half don't see their views reflected in the media	24%
Detached (11%)	**Lowest awareness** overall – especially for independent outlets	Average engagement with independent and non-independent	Low trust in media overall	37% neither agree nor disagree with media being owned by politicians	34%
Disillusioned Centrists (20%)	Average awareness of both independent and non-independent	Average engagement with independent and non-independent	Low trust overall, but slightly higher for independent media	Nearly all believe it's not appropriate for politicians to own media organisations	32%
Hopeful Europeans (22%)	Average awareness of both independent and non-independent	Average engagement with independent and non-independent	Low trust overall but slightly higher overall compared to other groups	66% don't believe that when media criticises the government it creates instability	32%
Engaged Liberals (28%)	Average awareness of both independent and non-independent	**Highest engagement** with both independent and non-independent	Low trust overall but the highest overall among groups	88% believe it's important that the news they watch is impartial	31%

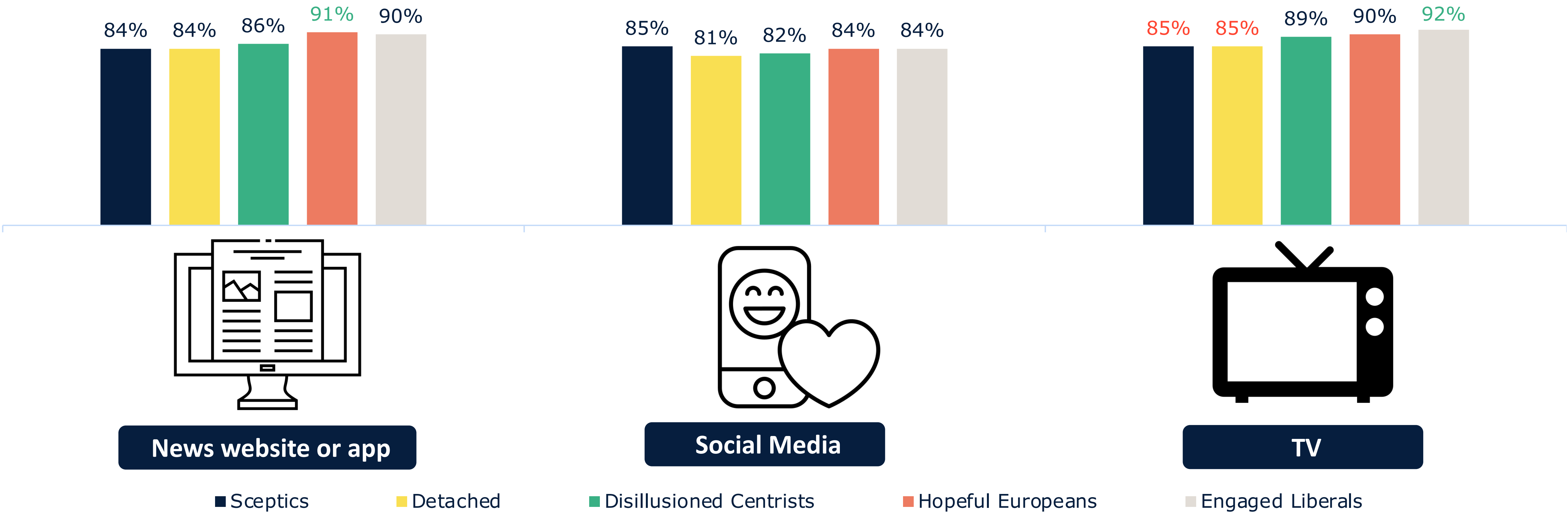
04 Findings in detail

Deep dive 1: Current media consumption

Most Slovenians 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

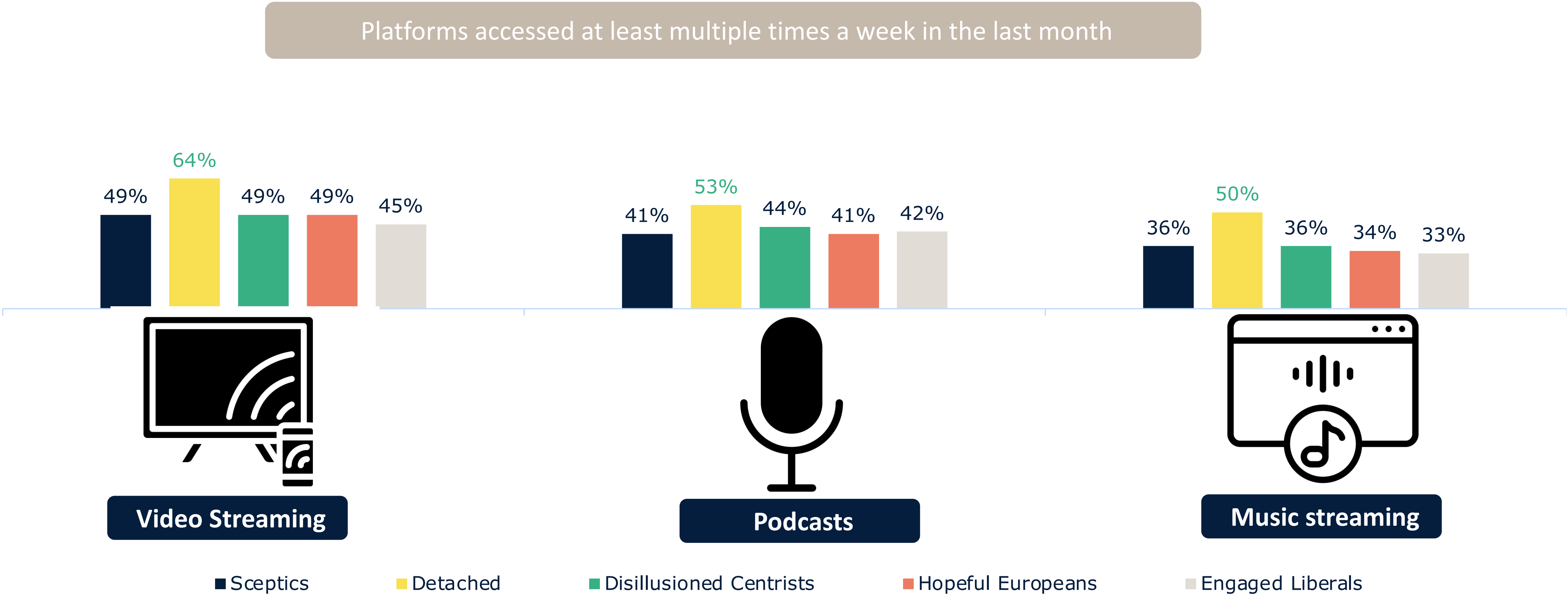
NB: Online figures may have been influenced by online methodology



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 (2034), Sceptics (418), Detached (241), Disillusioned Centrists (405), Hopeful Europeans (438), Engaged Liberals (529)

While streaming platforms are more popular amongst the more difficult-to reach Detached group



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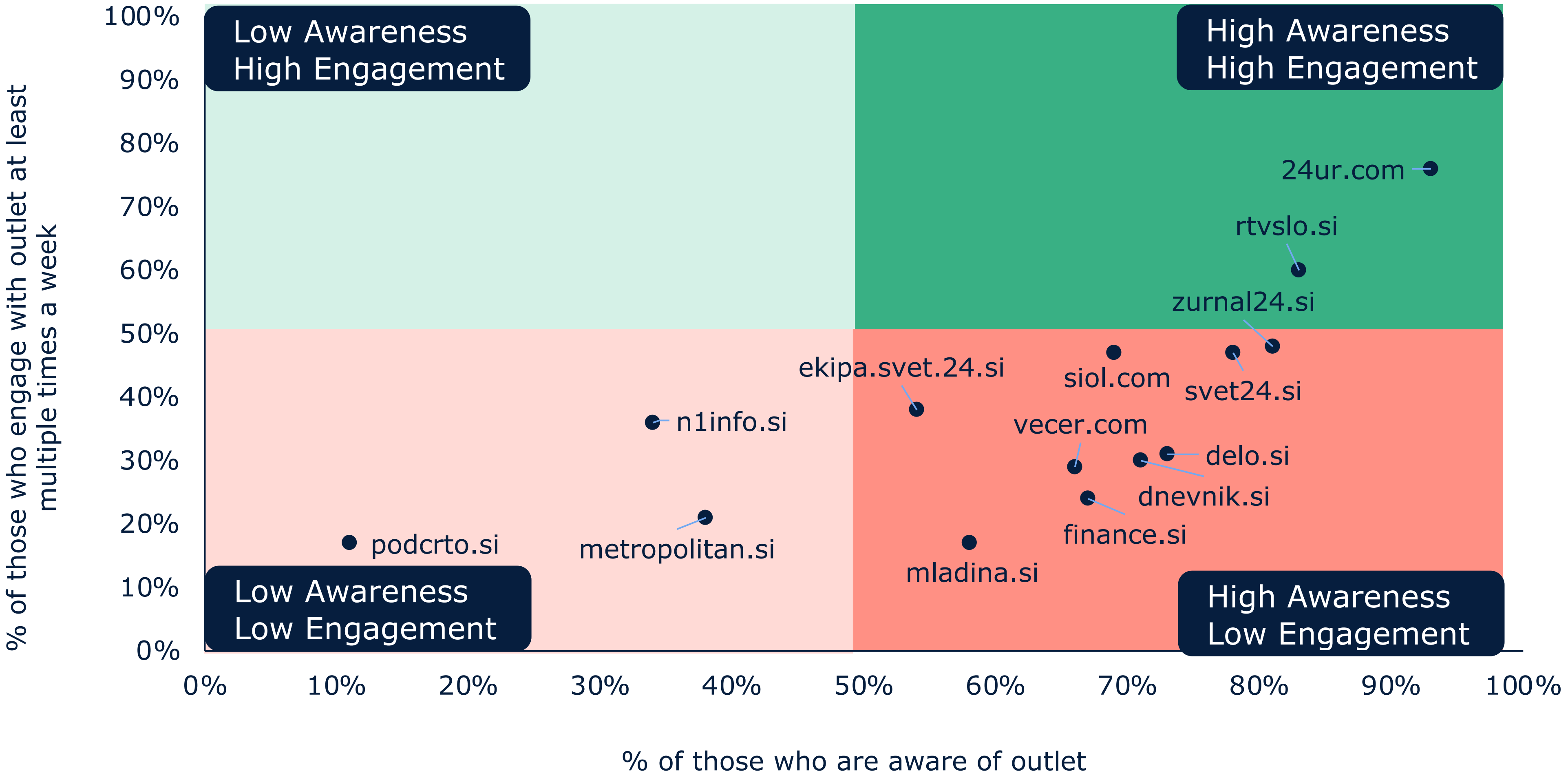
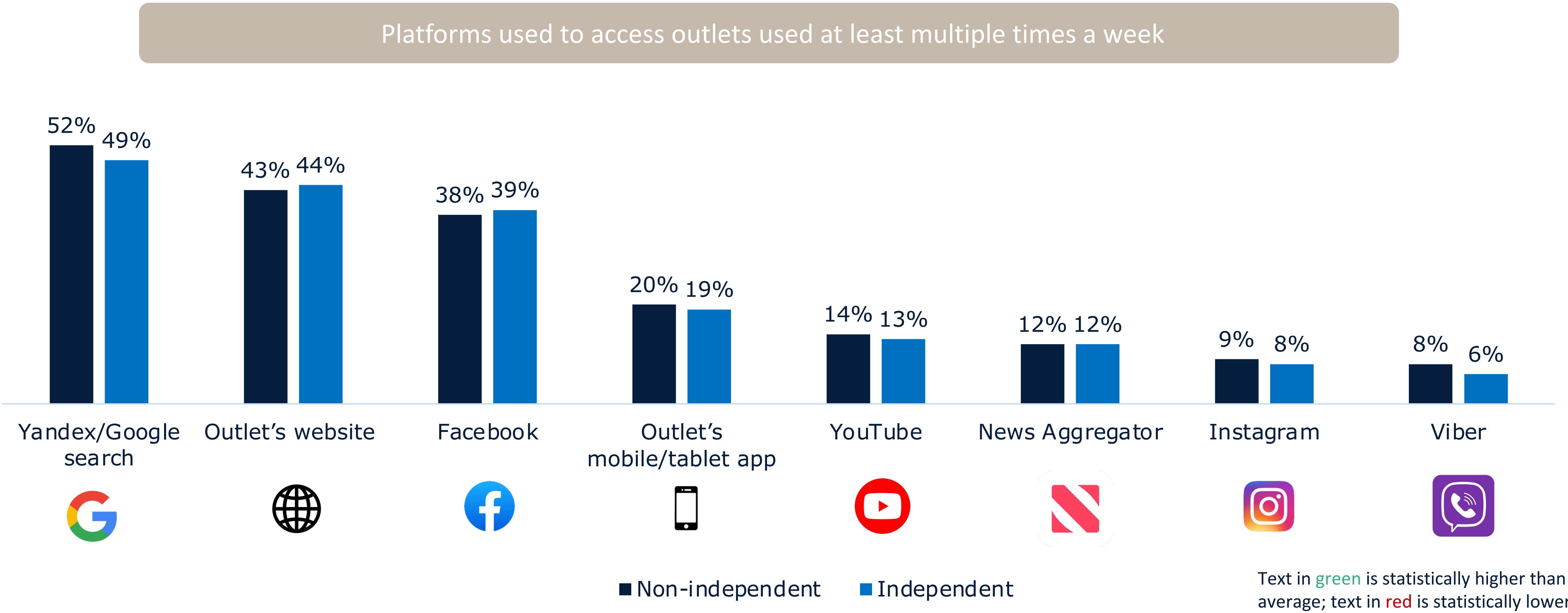
Only a small number of well-known outlets have also high levels of engagement in Slovenia



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

Slovenians use the same type of platforms to access both independent and non-independent outlets



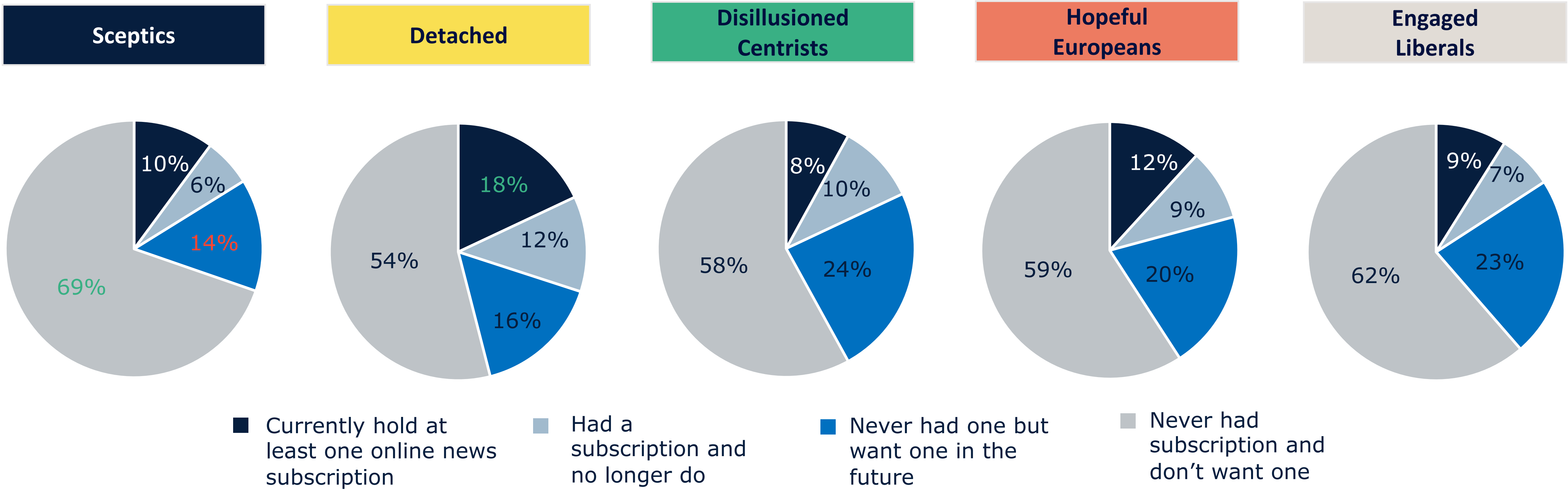
Text in green is statistically higher than average; text in red is statistically lower

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

While few in Slovenia currently hold a paid news subscription, nearly one in four are open to having one in the future

Willingness to pay for online news content

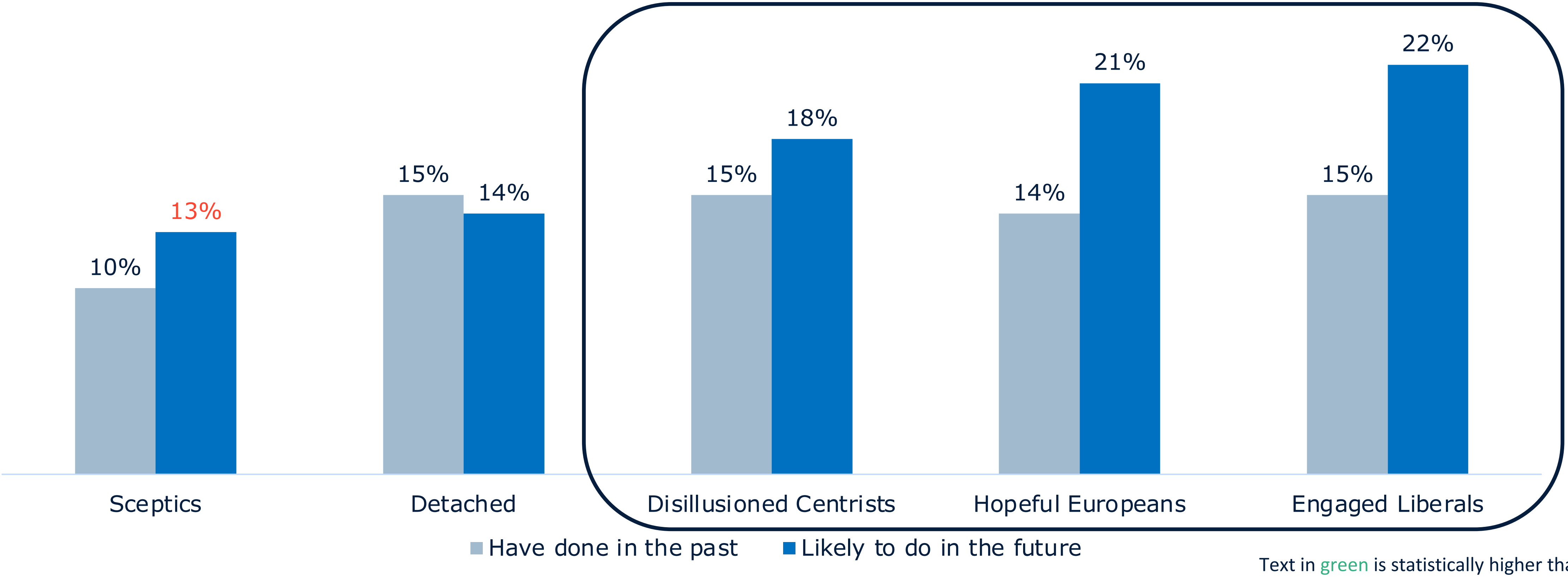


Text in green is statistically higher than average; text in red is statistically lower

Q14. Which of the following statements best describes your willingness to pay for content from online news sources? Base: All (2034), Sceptics (418), Detached (241), Disillusioned Centrists (405), Hopeful Europeans (438), Engaged Liberals (529)

Nearly one-fifth of target audiences would be willing to consider a free trial for online news in the future

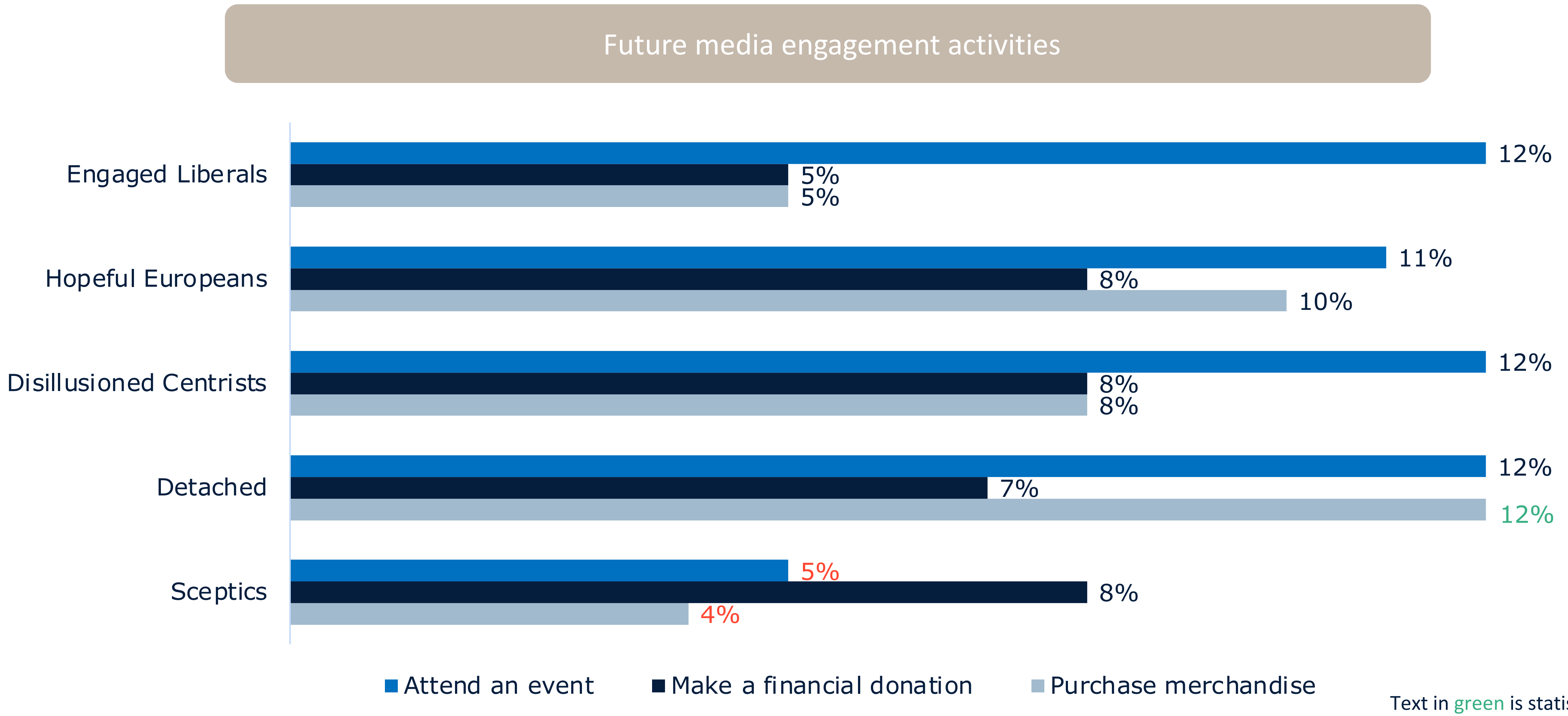
Subscribing to a free trial of a media outlet



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

Q17-4. Which of the following have you done in the past? and Q18-4. And which of these are you likely to do in the future? Subscribe to a free trial of a media outlet. Base: All (2034), Sceptics (418), Detached (241), Disillusioned Centrists (405), Hopeful Europeans (438), Engaged Liberals (529)

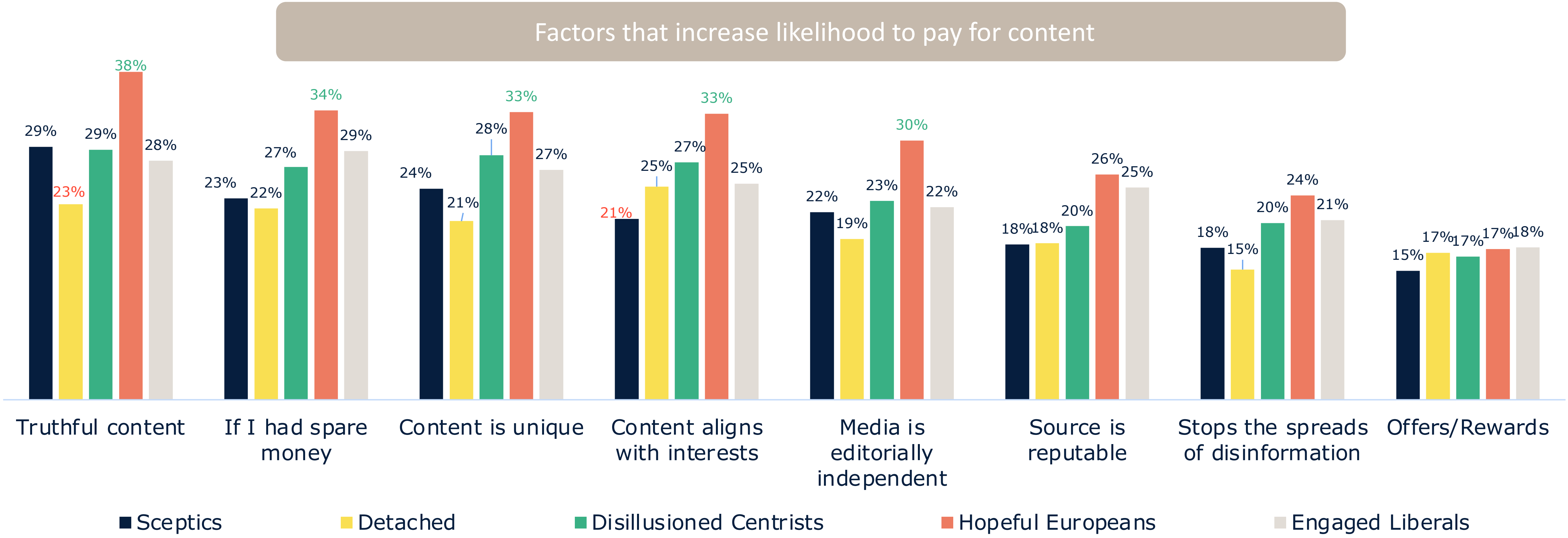
And roughly one in ten are willing to attend an event organised by media outlets



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

Q17-4. Which of the following have you done in the past? and Q18-4. And which of these are you likely to do in the future? Subscribe to a free trial of a media outlet. Base: All (2034), Sceptics (418), Detached (241), Disillusioned Centrists (405), Hopeful Europeans (438), Engaged Liberals (529)

Delivering truthful, unique content that aligns with Slovenians' interests can increase willingness to pay – especially among Hopeful Europeans

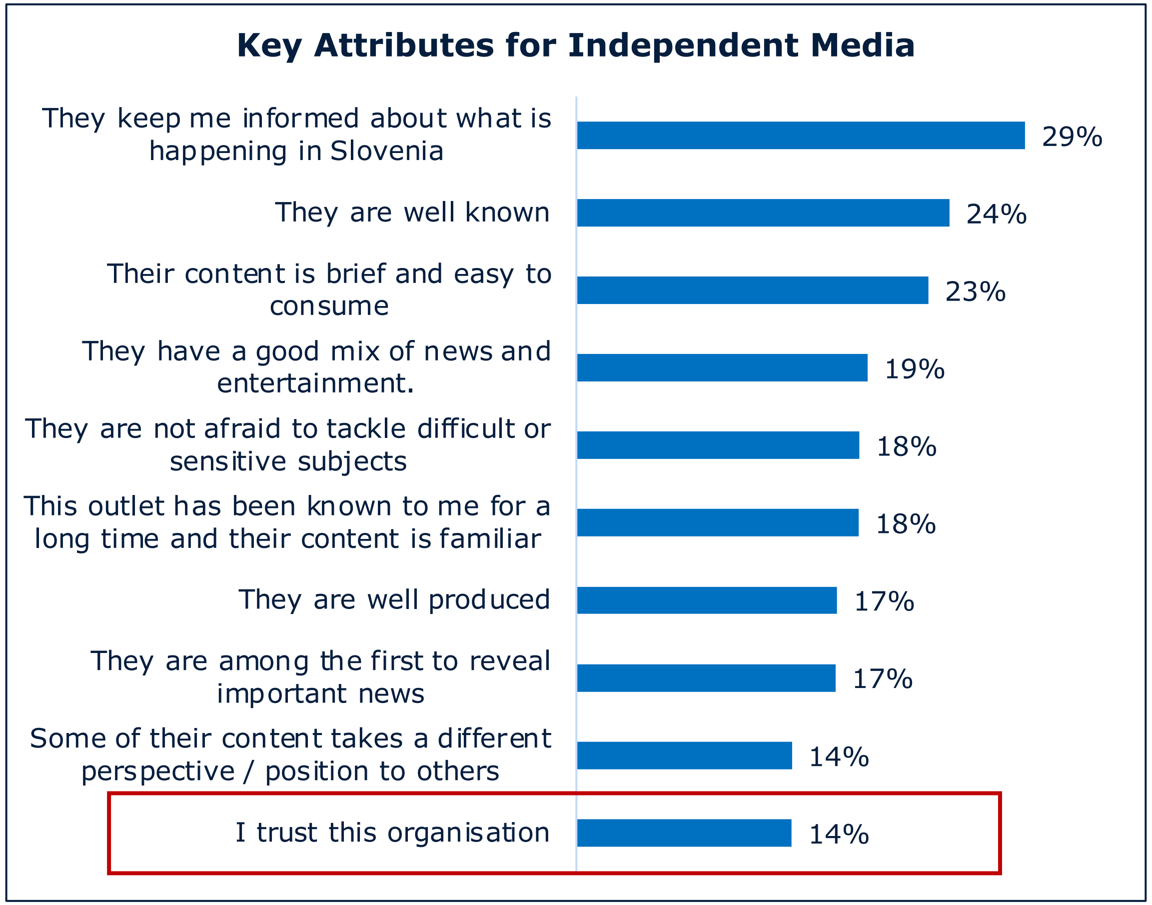


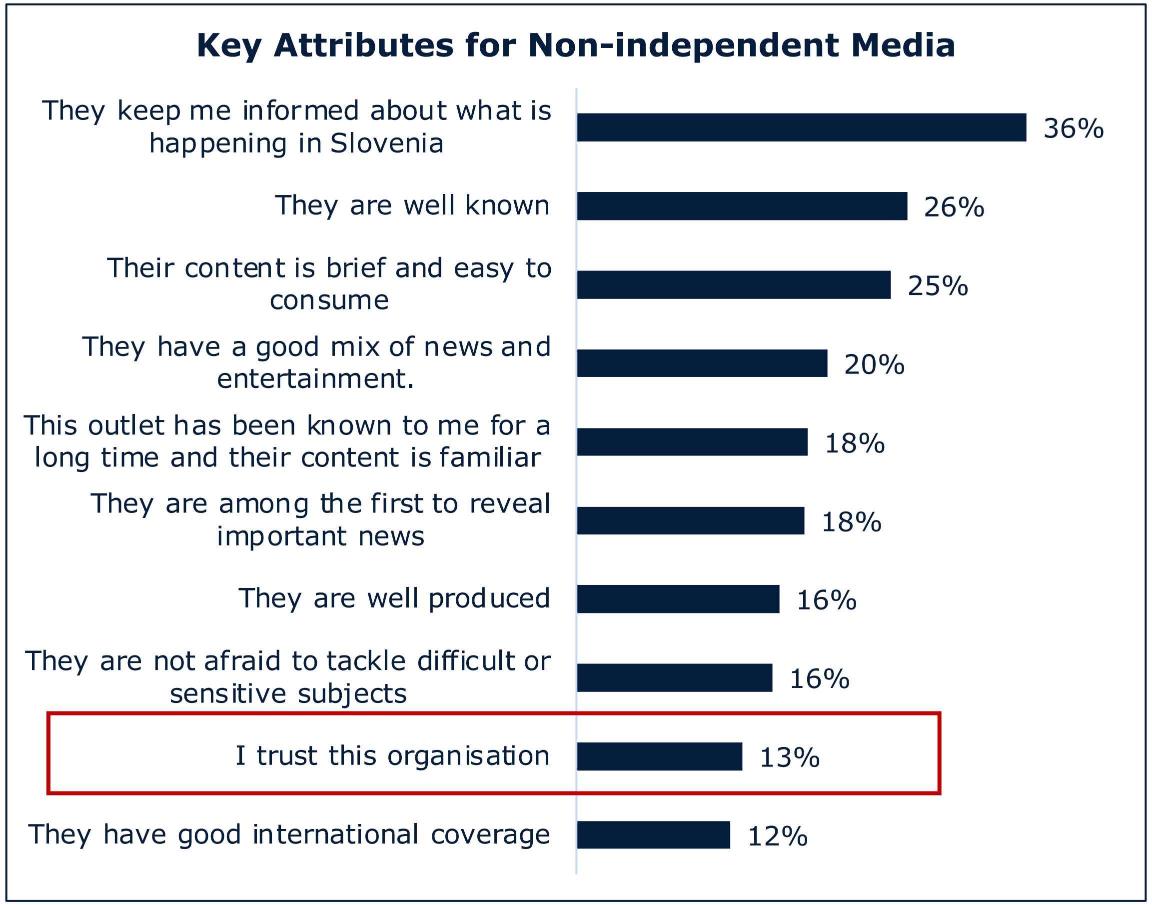
Text in green is statistically higher than average; text in red is statistically lower

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. (1823), Sceptics (377), Detached (201), Disillusioned Centrists (373), Hopeful Europeans (385), Engaged Liberals (484)

Deep dive 3: Trust

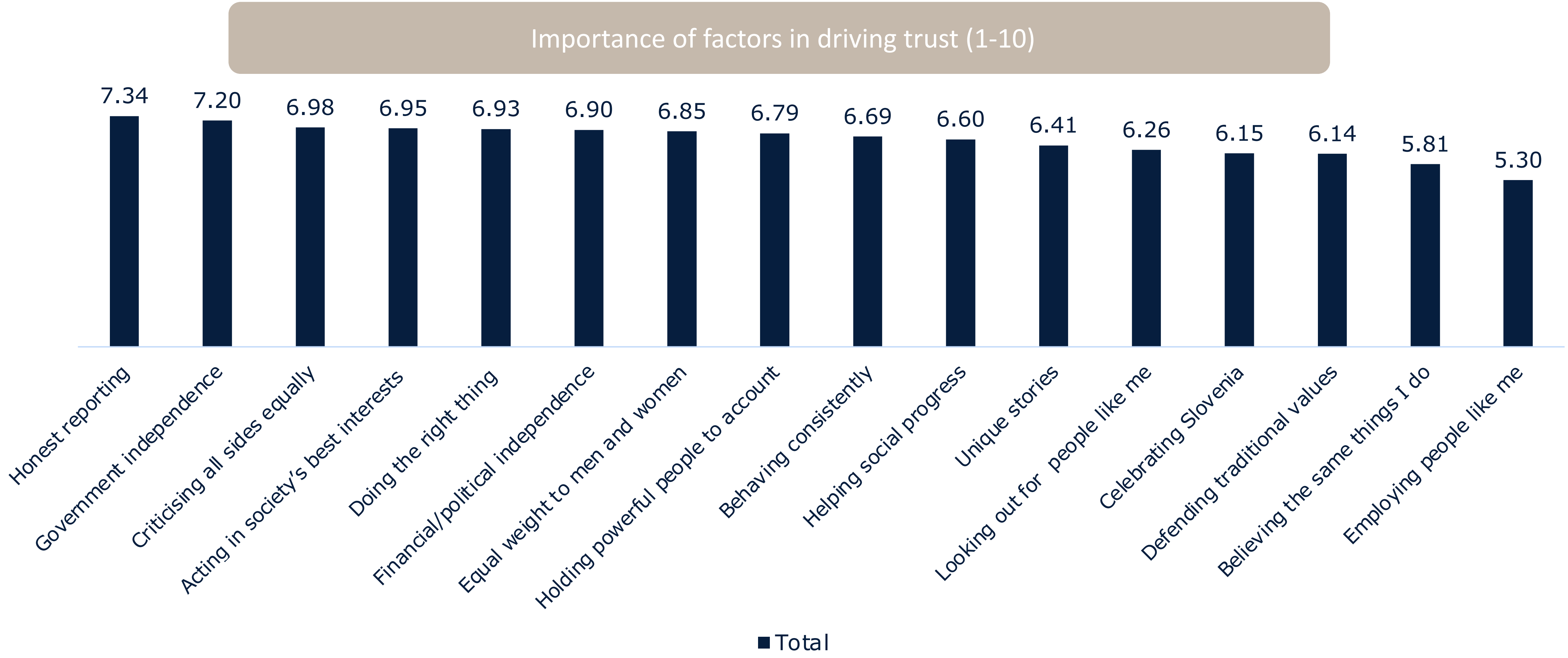
Trust is low for both independent and non-independent media in Slovenia





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, independence from the government, and criticising all sides equally 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? 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?

Topics relating to Science & Tech, as well as Travel, are among Slovenians' most preferred types of content

Top 5 content types each group wants more of

1. Comedy shows (42%)
2. **Science & tech (41%)**
3. **Travel (41%)**
4. Education programmes (39%)
5. Health (38%)

1. Comedy shows (36%)
2. Education programmes (36%)
3. **Science & tech (35%)**
4. **Travel (35%)**
5. Health (34%)

1. Comedy shows (44%)
2. **Travel (41%)**
3. **Science & tech (39%)**
4. Health (39%)
5. Human stories (37%)

1. **Science & tech (50%)**
2. **Travel (46%)**
3. Education programmes (44%)
4. Sport (41%)
5. Historical programmes (40%)

1. **Travel (48%)**
2. Health (47%)
3. Comedy shows (46%)
4. **Science & tech (45%)**
5. Education programmes (42%)

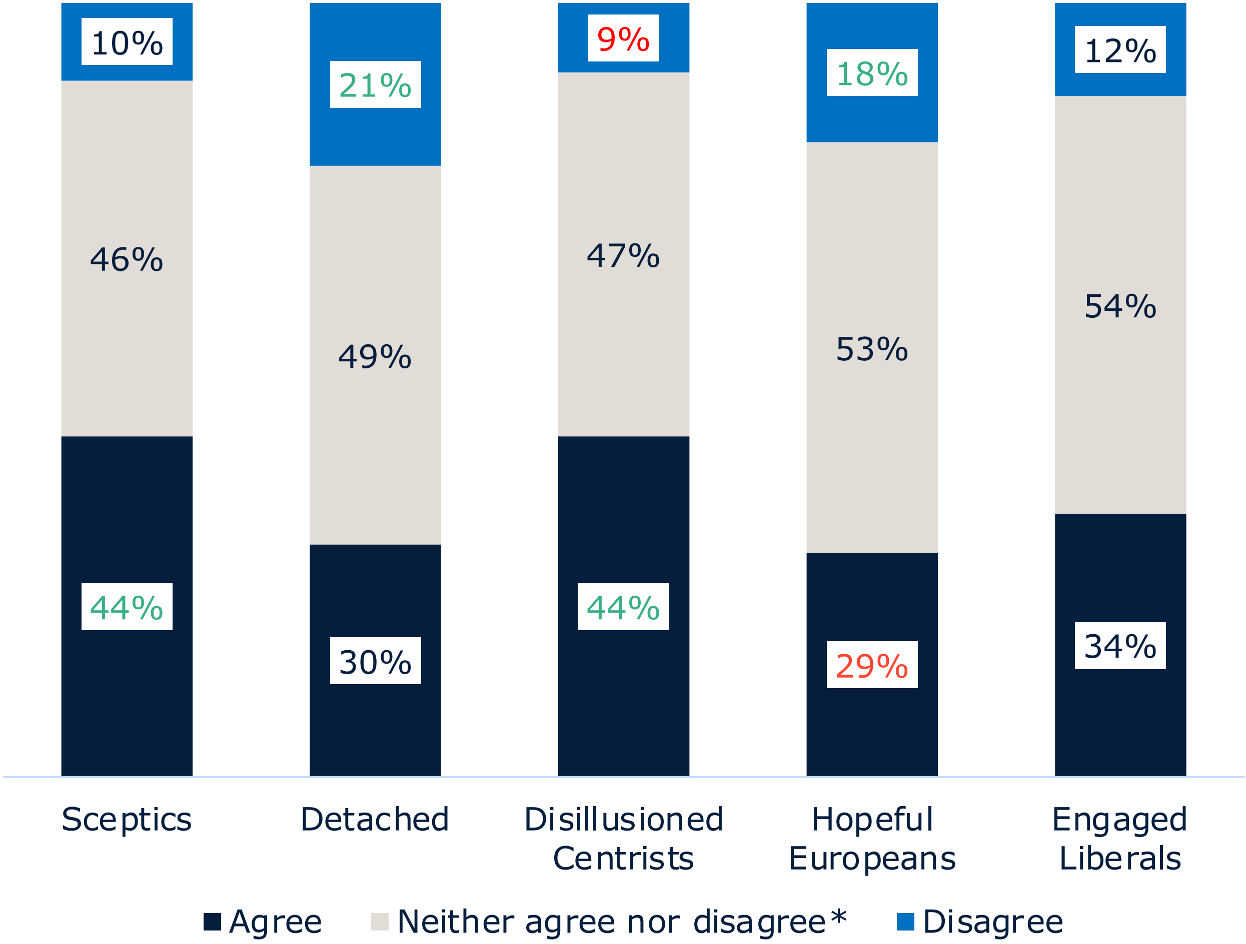
Text in green is statistically higher than average; text in red is statistically lower

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 (2034), Sceptics (418), Detached (241), Disillusioned Centrists (405), Hopeful Europeans (438), Engaged Liberals (529)

Deep dive 5: Attitudes towards media

36% of Slovenians overall don't believe their views are often reflected in the media

% Agree "I do not often see my views reflected in the media"



**NB: Includes "Don't know"*

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 (2034), Sceptics (418), Detached (241), Disillusioned Centrists (405), Hopeful Europeans (438), Engaged Liberals (529)

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

Besides the Detached, most Slovenians agree that the media they consume should be impartial

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

Sceptics	Detached	Disillusioned Centrists	Hopeful Europeans	Engaged Liberals
80%	44%	86%	82%	88%

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 (2034), Sceptics (418), Detached (241), Disillusioned Centrists (405), Hopeful Europeans (438), Engaged Liberals (529)

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

Political orientation
This is the largest cluster in the sample, comprising of nearly 28% of the entire pool of respondents. This group is mostly liberal and pro-EU. They support accelerating Slovenia's integration with the EU and being Slovenian and European are both considered very important to their identity. This cluster contains the largest portion of Slovenia's Freedom Movement voters (41%).

Key Demographics
This cluster is well educated, with above average completion of tertiary education (44%), and a very small number having only completed primary school (8%). This group is also financially comfortable, and it contains the largest number of older respondents (44% are aged over 55).

Cognitive Openness
This cluster can be considered as relatively cognitively closed. Indeed, they have the largest portion of respondents in the sample that claim to be more informed than most (46%), and the vast majority believes "truth" is a relative concept (81%). This makes them less susceptible to trusting new information that contradicts their current worldview.

Media Exposure
This group is currently the most engaged-with and trusting of independent media. However, levels of awareness, engagement and trust can be further boosted – particularly when it comes to our partner outlets.

88% claim that media impartiality is important to them

63% of this group engages with at least one independent outlet at least multiple times per week

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 the most trusting and engaged group with independent media already • They are also one of the biggest believers in media impartiality and are highly against media being owned by politicians • They are also cognitively more 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**	• **Reach them:** Most respondents in this group engage with news websites/apps, social media and TV at least multiple times a week • **Engage them:** This group wants more content relating to travel, health, and comedy. When it comes to N1, they like news from outside Europe • **Gain their trust:** They believe honest reporting and government independence are key trust drivers. Although currently few of them pay for a news subscription, nearly a quarter say they'd be willing to have one in the future, as long as the content is truthful and different to what they can access for free

Hopeful Europeans: Full profile

Political orientation

They tend to hold liberal/centrist views on most of the political and social issues analysed in the survey. They are also pro-European, with over a third of them wanting to accelerate Slovenia's integration with the EU and only 9% wanting its reversal. For this group, being European is almost as important as being Slovenian when it comes to their identity, and the vast of majority believe that Slovenia's values should align with those of the EU in the future (77%). 78% also rate the EU's influence on media as positive.

Key Demographics

This cluster is mostly middle-aged and over half (55%) works full time. They have one of the highest levels of education (with 43% having completed tertiary education), and they are also comfortable financially. They are also the group with the highest number of respondents that speak English on top of Slovenian (60%).

Cognitive Openness

This group can be considered relatively cognitively open. In fact, most respondents in this cluster don't believe they are more informed than most, while they view truth as an objective concept. 83% disagree with the statement that "truth" is just what somebody chooses to believe.

Media

This group has high levels of awareness and engagement for both independent and non-independent media. However, compared to other groups with similar levels of exposure to media, it tends to have higher levels of trust (albeit for both types of media as well).

44% say being European is very important to their identity

77% believe Slovenia's values should align with those of the EU in the future

Hopeful Europeans and independent outlets

Why they matter

- Although still quite low, their **trust in media is one of the highest among groups.** When it comes to partner outlets in particular, levels of trust seem to be similar for both well-known and lesser-known outlets, giving the latter an easier opportunity to form novel trusted brand reputations with this audience
- Although few in this group currently pay for an online news subscription, nearly 1 in 5 say they are willing to have one in the future. This group is the most likely to say that factors including accessing **truthful content**, **having spare money**, and consuming **content they cannot find for free** would make them more likely to pay for content

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:** Generally, they want more content relating to science and technology, travel and education programmes. When it comes to N1, they like national news and Slovenian economic news
- **Gain their trust:** They believe that honest reporting and independence from the government are key factors in forming trust for organisations

Disillusioned Centrists: Full profile

Political orientation

This groups makes up around 20% of the entire sample. People in this cluster tend to have the most centrist views on many of the political and social issues investigated in the survey compared to the rest of the groups. They tend to also be quite centrist in relation to Slovenia's further integration with the EU, and only 12% claim they want to reverse it. 64% of this group also believe that Slovenia's values should align with those of the EU in the future, and roughly the same amount prefer a democratic system, compared to a strong leader that can make decisions without input from courts.

Key Demographics

Although this cluster is mostly made of middle-aged respondents, it contains one of the largest proportion of young Slovenians (29% are below the age of 35). Most of them are employed full-time (58%) and have an average mid level of education and financial status. 26% claim they have enough money to meet their basic needs, but it may be a bit harder for them to purchase durable goods. This may hinder their chances to pay for media.

Cognitive Openness

While most respondents in this group don't believe they are more informed than most, they have one of the highest rates of people that view "truth" as a relative concept. While this might make them more open to receiving new information, they are also less likely to question its objectivity.

Media

While this group tends to have high awareness of independent and non-independent media, engagement and trust levels are slightly lower compared to the rest of the target groups.

44% don't see their views reflected in the media

92% say media should not be owned by politicians

Disillusioned Centrists and independent outlets

Why they matter

- While this group has slightly lower levels of trust compared to other groups, it has the biggest portion of respondents that claim **impartiality to be important**, as well as **ownership by politicians to be inappropriate**
- This group also tends to have one of the highest portion of respondents that currently do not see their views reflected in the media, while having low levels of awareness for N1. This gives the outlet **an advantage over better-known outlets to engage this group and offer them what they are missing from media**

How to win them over

- **Reach them:** This group engages with news websites/apps, social media and TV at least multiple times per week
- **Engage them:** Respondents from this group tend to like content relating to comedy, travel, science & technology and health. From N1 specifically, they like news on science and technology, as well as news about the war in Ukraine
- **Gain their trust:** Honest reporting and independence from the government are the two key factors for forming trust for organisations among this group

The Detached: Full profile

Political orientation

This is the smallest group within our sample, comprising only 11% of the total respondents. It is mostly centrist or conservative and tends to have the highest rate of "Don't know" responses on many topics compared to other groups, including whom they think Slovenia's values should align with in the future (29%). When it comes to their view of the EU, the majority are quite centrist about Slovenia's integration with the EU, and just over 4 in 10 believe the institution has a negative influence on the media in Slovenia.

Key Demographics

Although this cluster is mostly made of middle-aged respondents, it contains the largest proportion of young Slovenians (over a third are below the age of 35). This is also the group with the lowest level of education (29% have completed tertiary) and with the highest portion of respondents struggling financially (20% state that looking out for health needs/children/elderly is problematic for them).

Cognitive Openness

Most respondents in this group tend to not believe they are more informed than most and do not have a relative view of the "truth". These two variables taken together mean this group can be classified as somewhat cognitively open or, in other words, more prone to accept information that contradicts their current view of the world.

Media Exposure

This group tends to have the lowest levels of awareness across all types of media. When it comes to engagement, it also has slightly higher levels of engagement with non-independent media than independent. For this reason, this group is currently the most detached from independent media.

29% don't know whom Slovenia's values should align with in the future

30% say the impartiality of media is not important to them

The Detached and independent outlets

Why they matter	How to win them over
• This group is currently one of the hardest to reach for independent media, given their weak opinion regarding the importance media impartiality, ownership and editorial independence • Nevertheless, while this group's overall media awareness is lower than that of the other groups, their levels of engagement are similar. This depicts a future opportunity for less known organisations, including N1, to build new relationships with this untapped audience • N1 also has an advantage over other tested media organizations in a building a trusted brand reputation, given it has similar trust levels but is the least familiar among this group	• **Reach them:** Most access news websites/apps, social media and TV at least multiple times a week. They also access video and music streaming, as well as radio podcasts more than other groups • **Engage them:** This group wants more content relating to comedy, education and science and technology, although interest levels overall are lower compared to other groups • **Gain their trust:** This cluster believes the most important factors for organisations to gain their trust are doing the right thing when it isn't popular and honest reporting

Sceptics: Full profile

Political orientation

This group makes up 19% of the entire sample. While this group is mostly socially and economically conservative, it is quite liberal when it comes to the public role of the Church and is mostly in favour of a democratic political system. This group tends to have a quite negative view of all institutions, including the US government, the Slovenian government, local and foreign businesspeople, and the EU. Indeed, this group is the least likely to want Slovenia to accelerate its integration with the EU, as well as wanting Slovenia's values to align with those of the EU. It is also the least likely to identify as being European.

Key Demographics

This group is mostly middle aged and has an average level of education (over half have completed upper secondary school and are now employed full time). Financially, this group is struggling the most, with nearly one in five claiming buying clothes is problematic.

Cognitive Openness

Respondents in this group are the least likely to believe they are more informed than others. Most of them also do not view "truth" as a relative concept, making this group more cognitively open and prone to accept new information that contradicts their worldview.

Media Exposure

This group has average levels of awareness for both independent and non-independent media. While it currently has average levels of engagement for independent media, these are slightly lower for non-independent media

44% don't believe their views are reflected in the media

The vast majority view the influence of the EU, US and national government on media as negative

Sceptics and independent outlets

Why they matter	How to win them over
• This group is currently the most difficult target for independent outlets that want to grow their audience. While they do have average levels of engagement for independent media, they have the lowest trust levels and are the least likely to pay for a subscription, as well as engage in any media-related activities in the future • This group also strongly values media impartiality, but is highly skeptical towards all institutions • However, given their cognitive openness, lesser-known outlets including N1 still have the possibility of engaging this audience by forming a new trusted reputation	• **Reach them:** This group accesses news websites/apps, TV and social media at least multiple times a week • **Engage them:** Similar to other groups, they want more content relating to comedy, science and technology, as well as travel. • **Gain their trust:** This group believes that honest reporting and demonstrating independence from the government are key to forming trust