Independent Media Depend on You

KEY FINDINGS

Sent: November 24, 2020

Revised:

Realization: CESID in cooperation with Agency Communis

1. Intro

One of the main goals of USAID's Strengthening Media Systems (SMS) implemented by IREX is to support the development of financial sustainability, innovation, and partnerships in the Serbian media sector. To do so, IREX implemented the "Independent Media Depend on You" campaign. Following the global COVID-19 pandemic and consequential changes in behavior and media consumption, the campaign was on air from July to October 2020.

The main goals of this campaign were to underline the importance of independent media in Serbia and to raise awareness on different models of financial support that audiences can provide to independent media outlets in order to strengthen and maintain their longer-term sustainability.

In October 2020, research on media behavior and the effects of Free Media Advocacy Campaign was conducted with two main objectives:

(1) To examine the behavior of the audience, what media content they consume, how much trust there is in media and, their willingness to pay for media content. More importantly, the data aims to provide enough information to compare new results with previous ones, gained through CESID research „Comprehensive Study on the Media Public Needs and Behavior in Serbia" from February 2019

(2) To measure "Independent Media Depend on You" campaign effectiveness, which was predominantly focused on independent and critically positioned media in Serbia, and was on air from the end of July through October 2020

The research was conducted by CESID in cooperation with Communis agency from October 9-19, 2020, on 1,015 respondents in Serbia, ages 25-55 who using internet, with CAWI (computer-supported online research) method. To make the data sets from both comparable, the 2019 data in research report only includes audience 25-55 years old.

2. Key findings: Media consumption and trust

There are **no changes in trends** when it comes to specific media consumption: the audience still spends most time watching TV and listening the radio. However, in 2020 they are spending 108 minutes on each daily (on average), down from 161 and 168 minutes, respectively, back in February 2019.

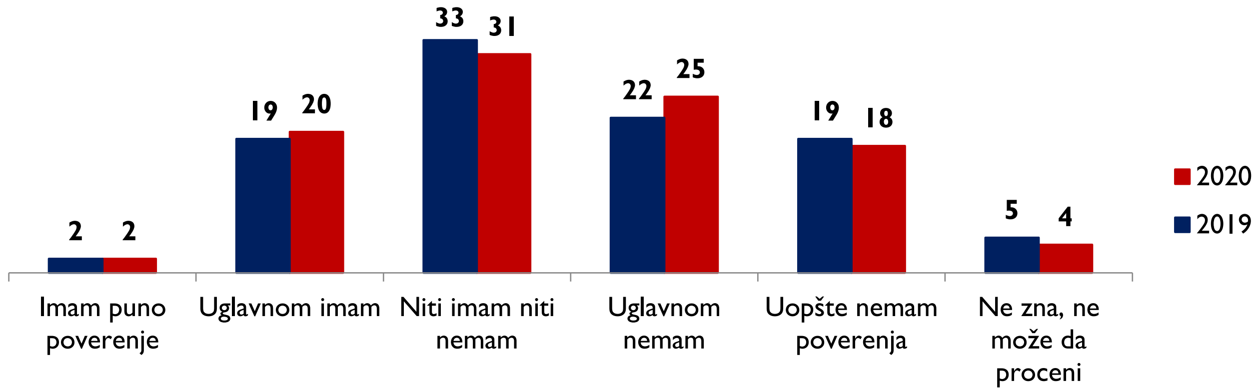
Social networks remain the third media in terms of time spent daily, the average time that respondents spent on social networks was 87.6 minutes, which is 39 minutes less than the 2019 research.

On news portals , respondents spend an average of 76.2 minutes, while in 2019, the average time respondents spent on this media was 120 minutes.

In fifth place was print media which respondents spent an average time of 27 minutes.

When it comes to (mis)trust, the trend remains the same: trust in media is poor and it remains low: **43%** of citizens mostly or completely mistrust the Serbian media, up from 41% in 2019:

What is your level of trust in media in Serbia? – comparison with the research conducted in 2019 (in %)



Transl: I have full trust; I mostly do; I neither have nor have; I mostly do not; I have no trust at all; Do not know, cannot evaluate

3. Key findings: Willingness to pay for the content

A large percentage of respondents were not willing to pay for online content, however, when compared with 2019 findings, the willingness to pay is more noticeable.

More than a dozen respondents are willing to pay for access to: additional cable TV packages (2020 – 17%; 2019 – 5%), video content (NETFLIX/Pickbox; 2020 – 16%; 2019 – 3%), sports content (2020 – 13%; 2019 – 2%), scientific/academic article or text (2020 – 12%; 2019 – 2%).

When it comes to specific content for which respondents would be willing to pay for access in the future, the largest percentage of respondents said they would not pay, but it is noticeable that these respondents **decreased by 15%**. Therefore, in 2020's research, 64% of respondents were not willing to pay anything, while in 2019, 79% of respondents had this viewpoint. Sports and movies, both with 1% in 2019, are now the best "candidates" for content payment at 9% and 7%, respectively.

When it comes to reasons why respondents would pay for access to some media content, the most important is that the media deal with topics that are important and interesting to them – **28% of respondents would pay for access to content** because of this, and it is a huge change compered to 18% in 2019.

The second most important reason why respondents would pay for access to media content is that the media provide access to information that others do not have (11% - 2020, 7% - 2019). The third most important reason to pay for access to some media content, respondents stated that the cost was negligible (8% of respondents).

Respondents preferred method of payment dramatically changed, compared to last year, mainly due to new habits caused by COVID-19 pandemics: now electronic payment, m-banking or e-banking is the preferred method of payment for most respondents, replacing bank transfer/payment order (43% vs. 18%). PayPal and "Crowdfunding" as ways of paying for media content are not common in Serbia, for various reasons including legal and technical dificulties and lack of knowledge/awareness.

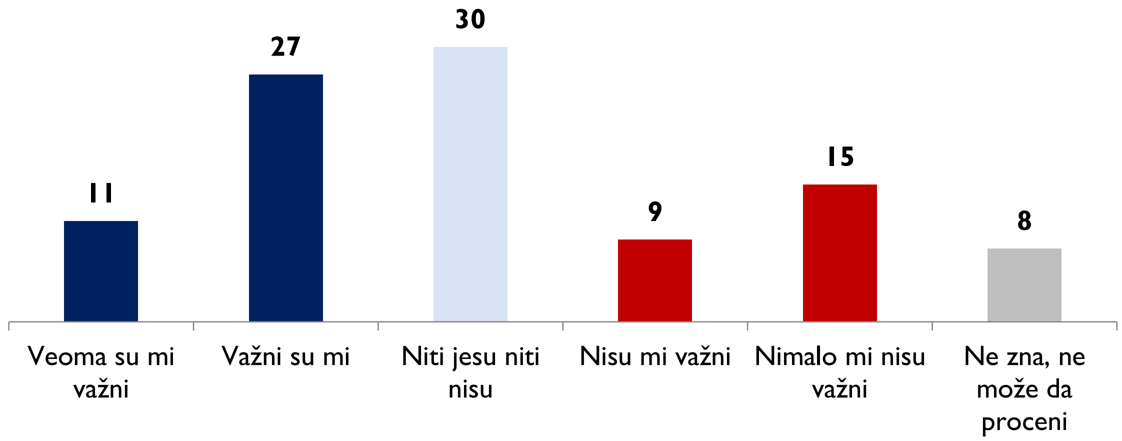
Even though the largest percentage of respondents would not pay for any media content in both research cycles, the willingness to pay for media content increased compared to 2019: **42% of respondents today state they would not pay for any media content, which is 11% less than last year.**

When it comes to financially supporting vulnerable media – 83% wouldn't help anyone which is 8% less than in 2019. When asked to recall which media would deserve their help, answers included TV N1 (3%), local media (2%) and Danas (2%).

4. Key findings: Willingness to support Independent and Local Media

An increasing number of citizens in Serbia recognizes independent media as paramount: **38% of respondents state that independent media are very important** (11%) **or important** (27%) to them.

How important are independent media to you? (in %)



Transl: Very important; Important, Nor yes nor not; Not important; Not important at all; Doesn't know, cannot assess

A total of 75% of respondents would not be willing to financially support the work of independent media in Serbia, so some of the support remains declarative. 16% of respondents would be willing to pay one-time financial assistance, while 9% of respondents would provide continuous support. Among those who support independent media, and would support financially, the most dominant demographic group are **highly educated millennials, living in urban areas.**

Local media also saw an increase of support: 18% would financially support local media, while their share in 2019 was 11%. **The average amount of financial support increased too**: from 750 RSD in 2019 to 866 RSD in 2020. When it comes to independent media, there is one in four who is ready to support them financially. When SMS compared how much the citizens of Serbia are willing to financially support work of local and independent media, SMS noticed that a larger number of respondents would financially support the work of independent media. Crossing these two questions IREX obtained the data that a large percentage of respondents who would not support work of local media also stated that they would not support independent media either. So, this is the same group that expresses its readiness to support these media, but the potential is greater on the side of independent media.

When it comes to the way they would prefer to provide financial support, **donations (49%) and subscriptions (24%)** are the most dominant followed by special content payment (16%) and online support (1%).

The most common reason that prevents respondents from supporting the work of independent media are financial (50%), while the second most common reason is not being informed of the ways in which they can support the work of independent media (27%). On the other hand, the main reason why audience do not support local media is because they are not interested (50%).

5. Key findings: Free Media Advocacy Campaign

The Free Media Advocacy campaign "Independent Media Depend on You" was conducted from the end of July to end of October 2020, with media mix focused on digital channels, social media, and cable TV. A number of project partners took part in the campaign through print (Danas, Vreme, LiceUlice) and digital channels (021.rs, Južne vesti, Bujanovačke, Lozničke, Forum, Magločistač, Krik). However, no media with significant national coverage was part of the campaign.

it.

Internet, combined with social networks, is the place where more than half of respondents noticed the campaign, while one in five saw it on TV. Keeping in mind that the total campaign reach of 11 million was built through digital and social media (93%) and TV (6%), the responses show the significance of TV for building the awareness.

When it comes to campaign goals, it can be considered successful: **it positively changed the view of importance of supporting independent media for 37% of respondents**, which more than a half think will raise the awareness of the public in relation to the media and support for free media, to a small (48%) or large degree (9%).

The campaign objectives were met when it comes to awareness too: the largest percentage of respondents, a total of 55%, state that they learned something from the "Support the Media" campaign: 22% of respondents learned about the importance of independent media in our society, while 13% of respondents learned about the importance of participating in media sustainability. Due to the participation of a number of journalists in the campaign, 20% learned how difficult it is to work in an independent media in Serbia.

Thanks to these learnings, **the attitude toward independent media has been positively changed and willingness to support them is increasing**, as this research shows.