

Survey on the Perception of Public Service Media in South East Europe

This publication aims to give a complete overview of public service media in South East Europe. In addition to the case studies and analyses of the situation in each country, it was also important to have a look at the perception of citizens and how they view public service media in their countries. Thus, the KAS Media Programme South East Europe commissioned a national representative survey in all ten countries that participated in the study. The survey was conducted by the research institute Ipsos.

The survey envisaged the use of a single data collection methodology in all countries surveyed. In all countries, except Romania¹, the survey was conducted as part of the CAPI omnibus (Computer Assisted Personal Interviews). The CAPI omnibus is an open structure survey in which data is collected via personal face-to-face interviews, but not for single data users. Questions from several users, each contributing with own set of questions, are compiled into a single questionnaire form, scripted into digital application and distributed on the CAPI system. As part of the project set-up phase, some preparations and adjustments were undertaken as necessary for the successful implementation of the survey. This happened in consultation between Ipsos and the KAS Media Programme South East Europe. Data collection was undertaken in the period May – July 2019.

The questionnaire was provided by KAS Media Programme South East Europe. It was composed of six questions. The questionnaire was originally written in English and subsequently translated by Ipsos into the local languages. The

¹ Due to sample restrictions imposed to CAPI, the survey in Romania was conducted through the CATI omnibus (Computer Assisted Telephone Interviews). Namely, the CAPI sample would have been designed to cover only the urban population in Romania, thus missing on the opinions of 45 percent of the total Romanian population (official statistics for Romania). Following these considerations, firstly, the questionnaire is very short and differences between CATI and CAPI usually appear on longer questionnaires. Secondly, the survey questions are simple and very easy to understand – the risk that any of the respondents might not understand the question over phone is low and interviewer's assistance is not necessary. Finally, questions are also quite general and not with a sensitive topic, so the respondents would not have any draw backs answering over the phone. On the other hand, the topic of the survey suggests differences between rural and urban population; running a CAPI survey only in larger cities would disable us to collect valuable opinions from rural population.

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Media Programme reviewed and approved all translations of the questionnaire. All interviewers were given written instructions containing general description of the questionnaire. People were asked following questions:

1. Are Public Service Media (PSM) important for democracy in your country?

Yes / no / I don't know

2. In your opinion, are PSM free from political influence in your country?

Yes / no / I don't know

3. How much trust do you have in following media?

Public TV / private TV / public radio / private radio / print media / online media

Very high / high / little / very little / no trust

4. How often do you use the services of public service media?

Daily / several times a week / several times a month / never

5. What type of funding do you prefer for PSM?

Tax subsidy / licence fees / advertisement / hybrid form / I don't know

6. What content shall PSM broadcast (multiple answers are possible)?

News / sport / culture / entertainment shows / educational shows / documentaries / talk shows / investigative political shows / movies / in-house produced films and series

Data was collected on the basis of representative samples from the population in the age group 18+ years in Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Kosovo, Republic of Moldova, Montenegro, North Macedonia, Romania, Serbia; thus having a target population of 46.5 million people. The total sample size is 10 383 respondents. The table below sets out the overall distribution of the interviewees and the distribution of the different demographic profiles.

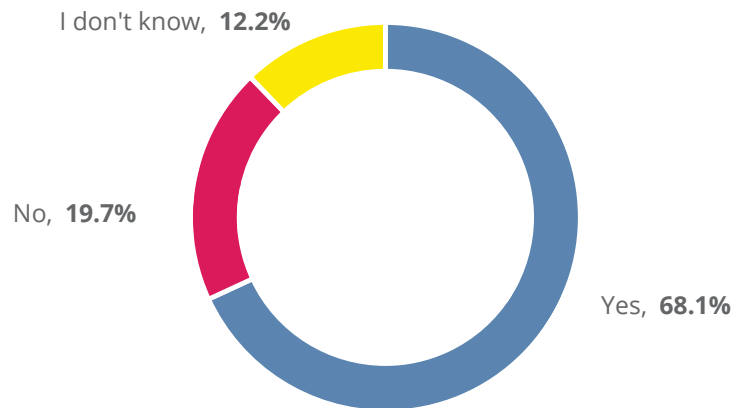
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		AL	BiH	BG	HR	RKS	MD	MNE	NMK	RO	SRB
N	10383	1095	1024	1000	1000	1043	1116	1001	1045	1001	1035
Gender											
sig	0,49										
Male	48.7%	541	497	498	484	516	503	498	522	499	495
		49%	49%	50%	48%	50%	45%	49%	50%	50%	48%
Female	51.3%	554	527	502	516	526	613	526	522	502	540
		51%	51%	50%	52%	50%	55%	51%	50%	50%	52%
Age											
sig	0										
18-29	22.8%	278	204	249	192	338	203	233	267	189	216
		25%	25%	25%	19%	32%	18%	23%	26%	19%	21%
30-49	36.6%	336	378	384	337	427	372	370	416	403	374
		31%	31%	38%	34%	41%	33%	36%	40%	40%	36%
50-64	25.1%	332	251	279	258	184	347	238	190	270	258
		30%	30%	28%	26%	18%	31%	23%	18%	27%	25%
64+	15.5%	149	191	88	213	93	194	183	173	139	187
		14%	14%	9%	21%	9%	17%	18%	17%	14%	18%
Education											
sig	0										
Primary or lower	23.1%	427	226	6	280	355	161	147	259	312	228
		39%	39%	1%	28%	34%	14%	14%	25%	31%	22%
Secondary	57.5%	545	620	698	622	514	675	702	572	434	589
		50%	50%	70%	62%	49%	60%	69%	55%	43%	57%
University or higher	18.7%	121	119	296	96	174	276	175	214	255	218
		11%	11%	30%	10%	17%	25%	17%	21%	25%	21%
No answer	0.6%	2	59	0	2	0	4	0	0	0	0
		0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

General results of survey

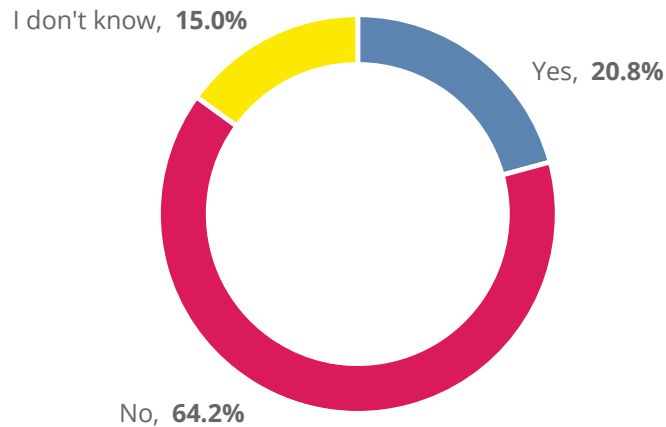
Every country chapter presents the results for the individual countries. Overall, numerous similarities are visible in public service media perception – but there are also some differences. In the following chapter, the regional averages will be presented with further details on the differences between the countries.

Chart 1: Are Public Service Media (PSM) important for democracy in your country? (Base: Total target population, in percent)



The influence and importance of public service media (PSM) in the monitored countries is recognised by 68.1 percent of citizens aged over 18 years (see Chart 1). There are significant differences in the responses to the question given by the citizens in Croatia, Bulgaria, Romania, Moldova and Bosnia and Herzegovina, where the importance of PSM for democracy is recognised to higher degree than the average for the region. For certain countries, this could be attributed to the political situation: Croatia, Bulgaria and Romania for example are already members of the EU and might have a stronger sense for democracy. Moldova could have a similar result due to its cultural connection with Romania. The reasons for the high recognition of the importance of PSM or democracy in Bosnia and Herzegovina should be sought in the specifics of the country: different cantons (ethnicities) are informed locally in different ways, and it could be that citizens wish for PSM to be most balanced and ethnically neutral information providers.

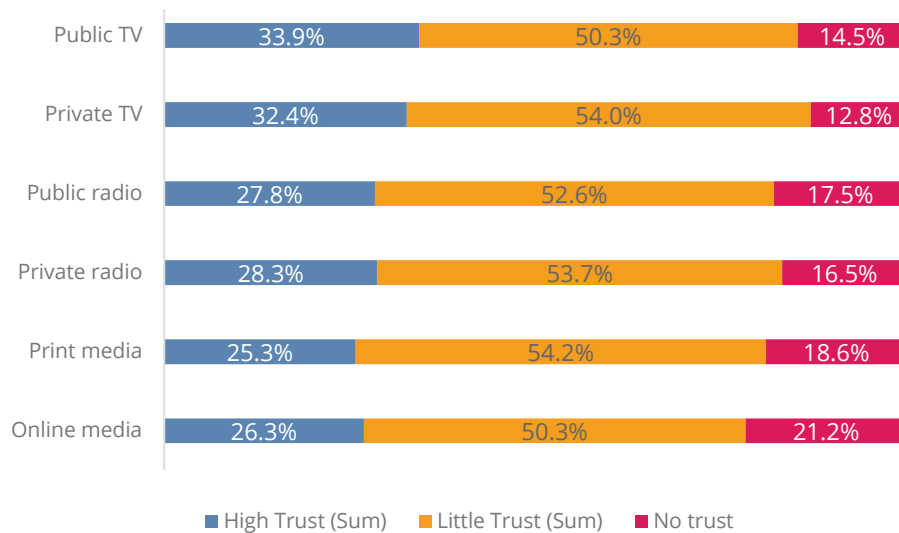
Chart 2: In your opinion, are PSM free from political influence in your country? (Base: Total target population, in percent)



Although the majority considers PSM important for democracy, they also believe that PSM are not free from political influence. This is the opinion of 64.2 percent of the respondents interviewed in all countries (see Chart 2), but this percentage is significantly higher in Croatia (83 percent), Bosnia and Herzegovina (88 percent) and Montenegro (71 percent). In some of the monitored countries where people use the services of the national broadcaster less often, like North Macedonia and Albania, the percentage of people who believe PSM are free from political influence is interestingly higher.

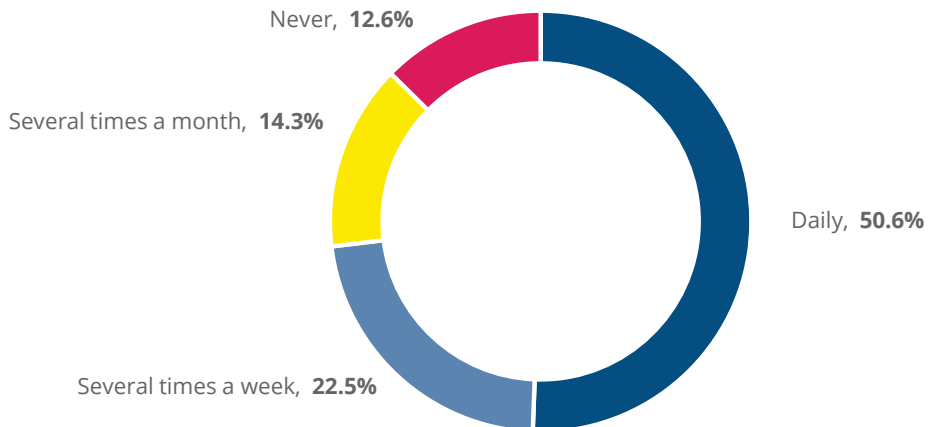
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Chart 3: How much trust do you have in following media? (Base: Total target population, in percent)



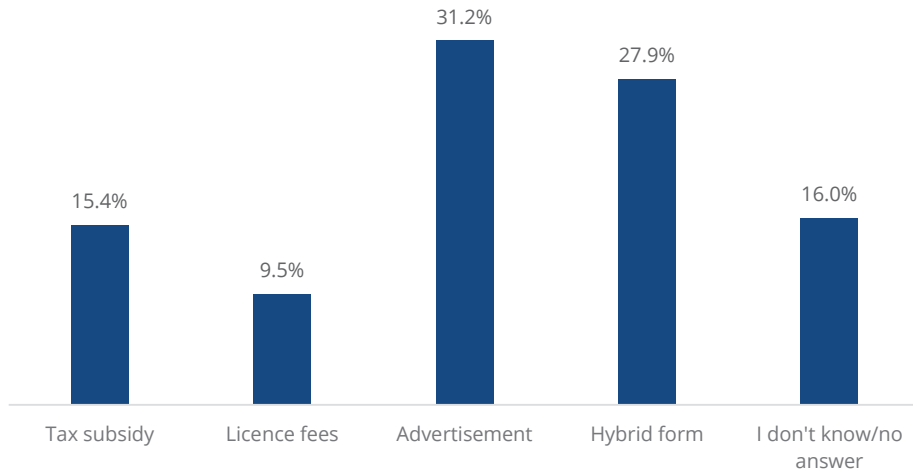
Citizens in the region do not have a high level of trust in any media channel. The range of the average rates for trust in each media channel shows that citizens do not point out any specific media channel that would be more reliable and trustworthy than others. Online media, together with print media are the least trusted media sources while TV enjoys the highest trust (see Chart 3). Media enjoy the least trust in North Macedonia, Serbia, Bosnia and Herzegovina, Croatia and Moldova. Looking at PSM, public television is generally trusted the most in the region, along with private TV stations. Public radio, however, is less trusted as compared to private radio.

Chart 4: How often do you use the services of Public Service Media (PSM)?
(Base: Total target population, in percent)



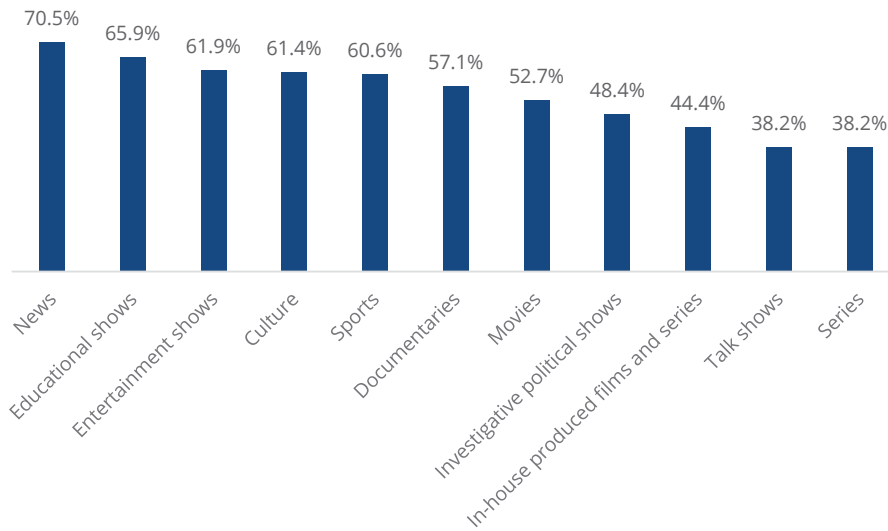
On average, half of the population uses PSM daily (see Chart 4). This percentage is significantly higher in Bulgaria (71 percent), Serbia (64 percent) and Croatia (69 percent). PSM are rarely used (several times a month or never) in North Macedonia and Albania, with similar percentages – 49 percent and 47 percent respectively.

Chart 5: What type of funding do you prefer for PSM? (Base: Total target population, in percent)



In Chart 5, you can see that the most preferred forms of PSM funding are advertising (31.2 percent of interviewed respondents) and a hybrid model (27.9 percent). In most countries, tax subsidies and licence fees have very low preference rates. Only in Romania and Moldova the tax subsidy system receives a higher percentage of preference as compared to the average for the region. In Moldova, it is even the preferred funding model with 45 percent. In general, it seems that people want less involvement of state organised financing and tend to prefer commercial models, and in particular advertising.

Chart 6: What kind of content should PSM present? (Base: Total target population, in percent, multiple answers possible)



PSM are primarily perceived as a channel for information, education and cultural programmes: the most mentioned preferences in terms of content that PSM should present includes news (70.5 percent), educational programmes (65.9 percent) and culture programmes (61.4 percent). Entertainment programmes are next in terms of audience preference: sport programmes (60.6 percent), entertainment shows (61.9 percent) and movies (52.7 percent). Most probably due to cultural and social specificities, the citizens in Albania, Bosnia and Herzegovina and Kosovo, refrain from deciding on PSM programmes, as the percentages for the answer allocated to each category are significantly lower but are consistent with the pattern observed: news, education, culture and sports.