Independent Media Depend on You

RESEARCH REPORT

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The views stated in this report do not necessarily represent the views of Agency Communis or USAID

CONTENT

1. Summary

The research on audience behavior and the effects of Free Media Advocacy Campaign was conducted on a sample of 1,000 respondents, 25 to 55 years of age, and focused on the citizens' viewpoint towards paying for media content (with the possibility of comparison to 2019 research) and evaluation of the campaign "Independent Media Depend on You" (IREX and Agency Communis).

In terms of media consumption, respondents from 2019 generally spent more time with media than in the 2020 research. In addition, **it is noticeable that respondents in both research cycles spent more time watching television and listening to the radio.** The average time respondents spent per day watching television in 2020 was 108.6 minutes, while in 2019 the average time spent watching this media was 161.4 minutes. The average time respondents spent listening to the radio in the research conducted in 2020 is the same as the time spent watching TV (108.6 minutes), while in 2019, radio was the media respondents spent the most time listening to – 166.8 minutes. Social networks are the third most used media in terms of time spent on them per day (average time for 2020 – 87.6 minutes; average time for 2019 – 126.6 minutes). In fourth place are informative online portals and sites, while fifth place is print media with which respondents spend the least time per day (average time – 27 minutes).

When it comes to citizens' trust in media, it is evident that in both research cycles there **is a greater distrust than a trust in the media,** and this fits in the broader picture of citizen's distrust in all civil society institutions. **A total of 43% of respondents generally do not trust the media in Serbia at all – in 2020,** while in 2019 the percentage was lower by two points (41%). On the other hand, a **total of 22% of respondents stated that they have full confidence and that they mostly have trust in Serbian media,** which is one percentage point more than in the research conducted in 2019. About a third of respondents had a neutral stance about trust in media (31% in 2020, 33% in 2019).

A large percentage of respondents were not willing to pay for online content, however, when compared with 2019's findings, SMS noticed that the **willingness to pay for online content is more noticeable in 2020.** More than 10% of respondents are willing to pay for access to: additional cable TV package (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 would not pay,** but it is noticeable that **in a year and a half the percentage of these respondents decreased significantly by 15 percentage points. Therefore, in 2020's research, 64% of respondents would not pay anything, while in 2019, 79% of respondents had this viewpoint.** Respondents who would be willing to pay for access to content mostly refer to sports content (9%) and movies and series (7%).

Two of the most important reasons why respondents would be willing to pay for access to some media content are **that the media deal with topics that are important and interesting to respondents** (28% - 2020, 18% - 2019) and **that the media provide access to information that other media do not have** (11% - 2020, 7% - 2019). **Electronic payment, m-banking or e-banking is the way of paying for media content that suits the respondents the most in the research conducted in 2020** - 43% of respondents share this stance. In the 2019 research, the respondents were most satisfied with paying for media content via bank transfer or payment slip – 47%.

When it comes to the dynamics of payment for media content, SMS noticed an increase of those respondents who would pay monthly for media content (research in 2020 – 29%, research in 2019 – 27%) and an increase of those who would pay one-time for media content (reserach in 2020 – 15%, research in 2019 – 10%).

When asked whether and what amount of money they would be willing to spend on a monthly basis if some of the content they regularly follow introduced a subscription, the largest percentage of the respondents stated that **they would not pay a subscription for any media content (42% of respondents), which is 11 percentage points less than 2019**. The subscription would be paid by 22% of respondents, which is 4 percentage points more than 2019. The largest percentage of respondents stated they would not support any media if its funding was in jeopardy. In the research conducted in 2020, 83% of respondents had this stance, while in 2019, 91% of respondents shared this stance, which is 8 percentage points more.

When it comes to the importance of independent media, SMSconclude that a **total of 38% of respondents state that independent media are very important or important to them.** On the other hand, total of 24% of respondents state that these media are not important to them at all or not important to them. **A total of 72% of respondents would not be willing to support independent media financially, 16% of respondents would be willing to pay one-time financial assistance, while 9% of respondents would provide continuous support. SMS noticed that citizens of Serbia would rather financially support the work of independent media than the work of local media. The model of support for independent media that suits respondents the most are donations (49%)**, subscription as a support model suits 24% of respondents, and payment of special content/information as a support model for this media is the most suitable for 16% of respondents. **The two most common reasons that prevent respondents from financially supporting the work of independent media are the financial capabilities of respondents (49%) and the fact that respondents are not informed about the ways they can help (27%).**

The work of local media would not be financially supported by 82% of respondents in 2020's research, while in 2019 that percentage of respondents was higher - 89%. On the other hand, in 2020, a total of 18% of respondents would support local media financially, which is 7 percentage points more than 2019. Respondents who stated that they would be willing to financially support the work of local media, continuously and once, would be willing to set aside an average of 866.00 dinars, while the average amount of money that respondents would be willing to set aside, in a research conducted in 2019, was 750.00 dinars.

Total of **55% of respondents stated that they had learned, from the campaign to support Independent Media, about the importance of independent media in society (22%)**, how difficult it is to work in an indepent media (20%) and the importance of participating in media sustainability (13%). **37% of the respondents positively changed their opinion about media and the importance of supporting independent media** due to this campaign**.** According to the largest percentage of respondents (48%), the campaign "Independent Media Depend on You " only slightly raised Serbian citizen's awareness in relation to the media and support for independent media. On the other hand, 27% of respondents believe that it didn't raise citizens' awareness at all.

2. Why research on audience behavior and the effects of the Free Media Advocacy Campaign

Research on media behavior and the effects of the Free Media Advocacy Campaign had two main objectives. The first was to examine the behavior of the audience, what they consume, how much trust there is in media, and, especially, to examine the willingness to pay for media content. The second was very specific and included measuring of the "Independent Media Depend on You" campaign's effectiveness which was predominantly focused on independent and critically positioned media in Serbia.

At the beginning of 2019, SMS conducted a research "Comprehensive Study on the Media Public Needs and Behavior in Serbia" on a sample of 1,500 respondents, 15 to 65 years, and it will serve as a platform for comparative analysis for questions about willingness to pay for media contents. For the purposes of this research, only the data on the target group 25 – 55 years will be compared, because that was also the target group of “Independent Media Depend on You” campaign.

2. Methodological framework

In Table 2.1. the methodological framework for this research is presented.

Table 2.1. *Methodological framework for the research*

Who?	**CeSID in cooperation with Agency Communis, supported by the SMS project / USAID Serbia**
Field work	October 9 to October 19, 2020
Sample	Random sample of 1,015 respondents in Serbia, , ages 25-55
Sample frame	Population ages 25-55 who use internet
Household selection	Random sampling without replacement
Research method	CAWI – computer-supported online research
Research tool	32 questions

The methodological framework defined in this way and conducted field research led to the following sample structure:

Gender: male (48%) and female (52%)

Average age of respondents: 39

Education: primary school or less (10%), two-year/three-year school (15%), four-year high school (37%), college/university (34%), masters/doctorate (4%)

Employment status: employed (with an employment contract) 74%, unemployed (with an employment contract) 21%, retiree (2%), and pupil/student (3%)

Income per household member: does not want to say (53%); among 47% of respondents who said – up to 20 thousand (22%), from 20 to 40 thousand (39%), from 40 to 60 thousand (23%), from 60 to 80 thousand (7%) and more than 80 thousand (9%)

Place of residence: city (67%), suburb (13%) and village (20%)

3. Content payment: what has changed compared to 2019?

In this section, SMS will process data concerning media consumption and trust in the media and how much citizens are willing to pay for media content. SMS will compare the data received in the research cycle conducted in 2020 with similar research conducted in 2019 and show how much citizens’ attitudes have changed. The findings need to be understood in the context of the fact that the COVID-19 pandemic was declared between these two cycles, which fundamentally changed the entire media industry.

3.1. Media consumption and trust

When it comes to media consumption, i.e. how much average time respondents spend with media per day, SMS learned that **respondents spend most of their time watching TV and listening to the radio.** When compared with the data from the research in 2019, SMS found no changes in trends. In addition to this observation, SMS noticed that **in 2019 respondents spent more time with media in general than in 2020** (Charts from 3.1.1 to 3.1.4). The average time respondents spent watching TV was 108.6 minutes in 2020, while in 2019 the average time spent was 161.4 minutes, which is almost 52.8 minutes more (Chart 3.1.1). As already mentioned, the second media type respondents spent most of their time with was the radio, and the average time spent listening to the radio was the same as watching TV, 108.6 minutes. However, in 2019, research respondents spent most of their time listening to the radio – an average of 166.8 minutes per day (58.2 minutes more than in a research cycle conducted in 2020). Social networks were third in terms of time spent on them per day, the average time that respondents spent was 87.6 minutes, which is 39 minutes less than in the 2019 research, Chart 3.1.3. On informative portals and websites, respondents spent an average of 76.2 minutes, while in the research conducted in 2019, the average time respondents spent on this media was 120 minutes (Chart 3.1.4).

Chart 3.1.1 – *How much time do you spend watching TELEVISION in one day? – comparison with the research conducted in 2019 (average time in minutes)*

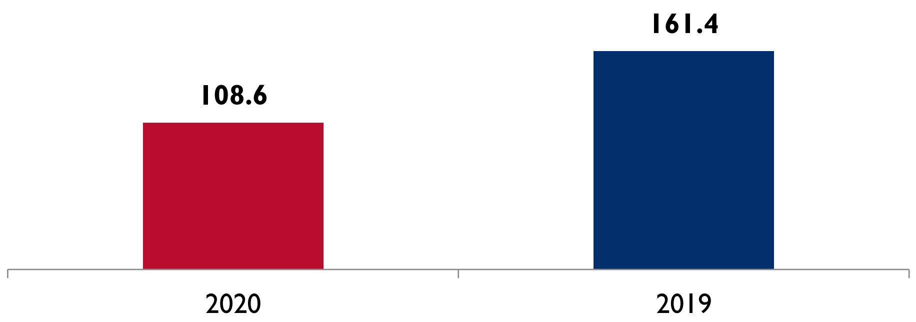


Chart 3.1.2 – *How much time do you spend listening to the RADIO in one day? – comparison with the research conducted in 2019 (average time in minutes)*

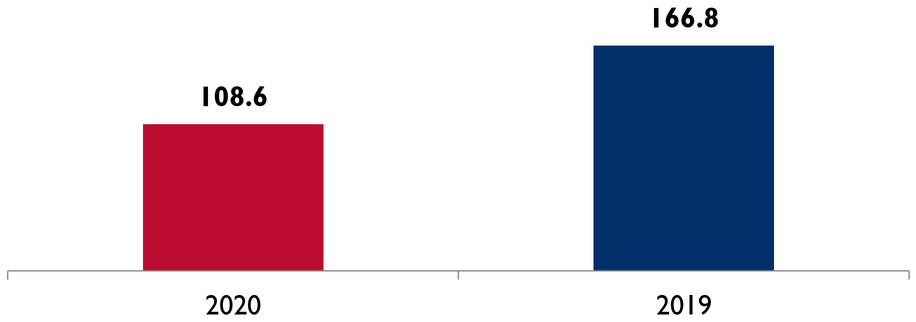


***Chart 3.1.3** – How much time do you spend on SOCIAL NETWORKS? – comparison with the research conducted in 2019 (average time in minutes)*

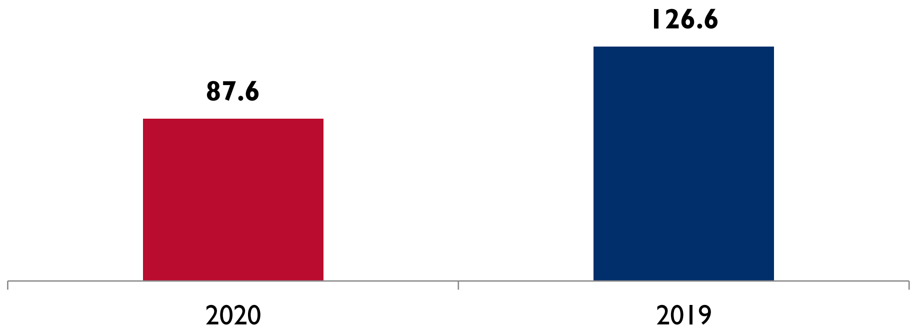
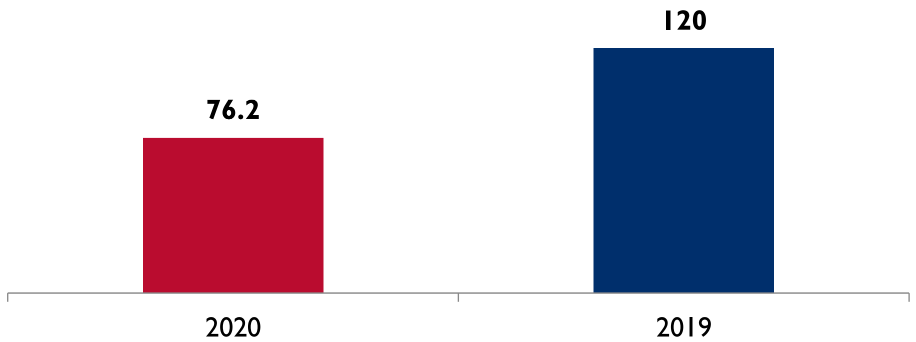


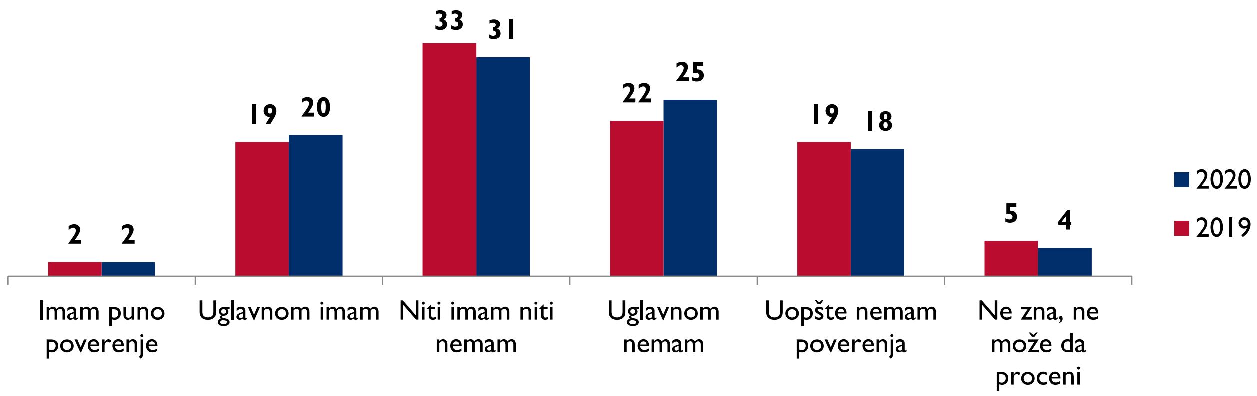
***Chart 3.1.4 –** How much time do you spend on INFORMATIVE INTERNET PORTALS and WEBSITES? – comparison with the research conducted in 2019 (average time in minutes)*



Print media, especially newspapers, are losing when it comes to technology and digital media. The average time that respondents spent reading print media per day compared to previously mentioned media, is much lower – 27 minutes is the average time that respondents spend reading print media in one day.

There is greater distrust among the citizens of Serbia than trust in media, and this is the case both in 2020's research and in the research conducted in 2019. SMS observed, from Chart 3.1.5, that in the research conducted in 2020, the distrust in media is somewhat higher than it was in 2019. **In 2020, a total of 43% of respondents generally did not trust the media in Serbia, which is two percentage points less than in 2019 (41%)**. On the other hand, **a total of 22% of respondents have full trust or mostly have trust in media in Serbia,** which is one percentage point more than in 2019. About a third of respondents had a neutral position on trust in media (31% - 2020, 33% - 2019).

***Chart 3.1.5 –** 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

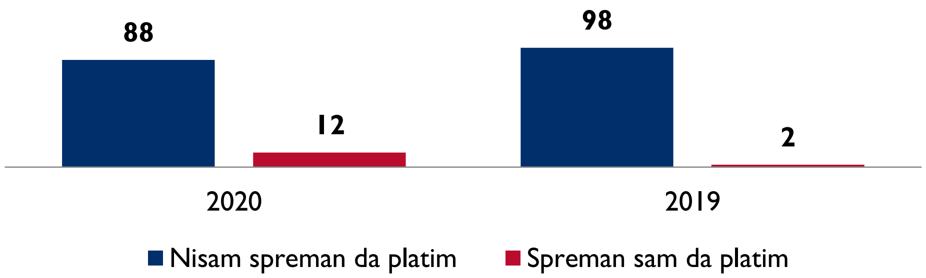
3.2. Willingness to pay for content: amounts, method and dynamics of payment

In this section, SMS will present an analysis of the respondents' willingness to pay for online content, how much they are ready to set aside for online access to content, and in what way.

SMS asked citizens of Serbia if they are willing to pay for online access to any of the following content: *scientific/academic article or text, video content online (NETFLIX, Pickbox…), music content, sports content* (broadcasts of matches, tournaments, Champions League…), *domestic and foreign magazine, additional cable TV package s(HBO, Arena, SK package…), domestic and foreign weekly* (Charts from 3.2.1 to 3.2.9). SMS learned that a large percentage of respondents are not willing to pay for access to online content and **willingness to pay for online content is low.** It also noticed that **respondents were more willing to pay for access to online content in 2020 compared to 2019**, which is encouraging.

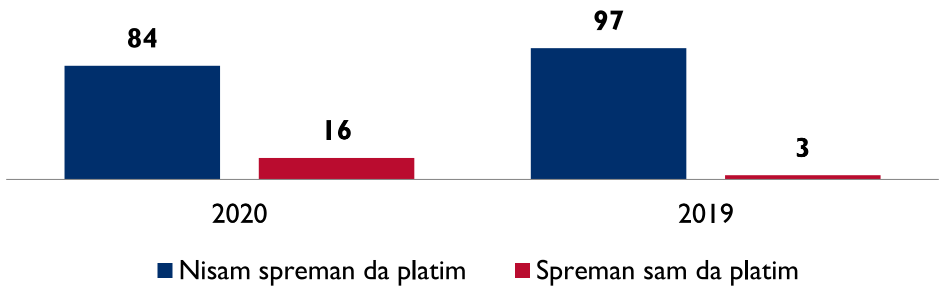
Respondents were most willing to pay for access to online content when it comes to additional cable TV package (HBO, Arena, SK package…) – 17%, while the number of respondents in 2019 was 12 percentage points lower. A slightly lower percentage of respondents (16%) were willing to pay for online access to video content (NETFLIX, Pickbox…), which is 13 percentage points more compared to the research conducted in 2019. Access to sports content (broadcasts of matches, tournaments, Champions League…) was chosen by 13% of respondents, while in 2019 that percentage of respondents was 2%. 12% of respondents were willing to pay for access is scientific/academic article or text, which is 10 percentage points more than in 2019. Less than a dozen respondents were willing to pay for access to the following content: music content (9%), domestic magazines (4%), foreign magazines (3%), domestic weekly (4%), and foreign weekly (1%).

Chart 3.2.1 – *Scientific/academic article or text - comparison with the research conducted in 2019 (in %)*



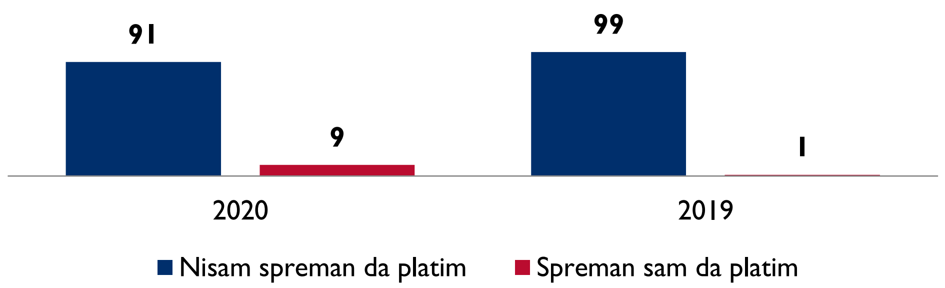
Transl: I am not ready to pay; I am ready to pay

Chart 3.2.2 - *Online video content (NETFLIX, Pickbox) - comparison with the research conducted in 2019 (u %)*



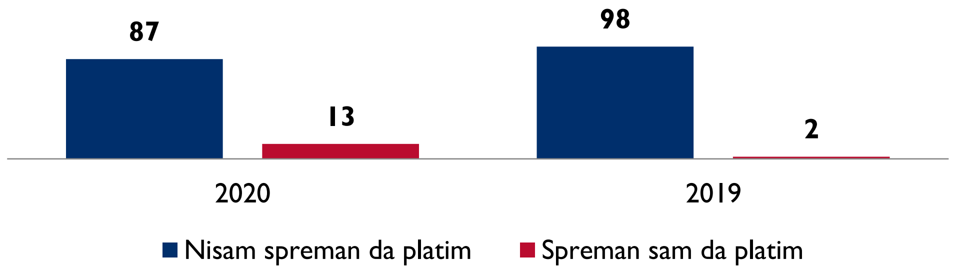
Transl: I am not ready to pay; I am ready to pay

Chart 3.2.3 – *Online music content - comparison with the research conducted in 2019 (in %)*



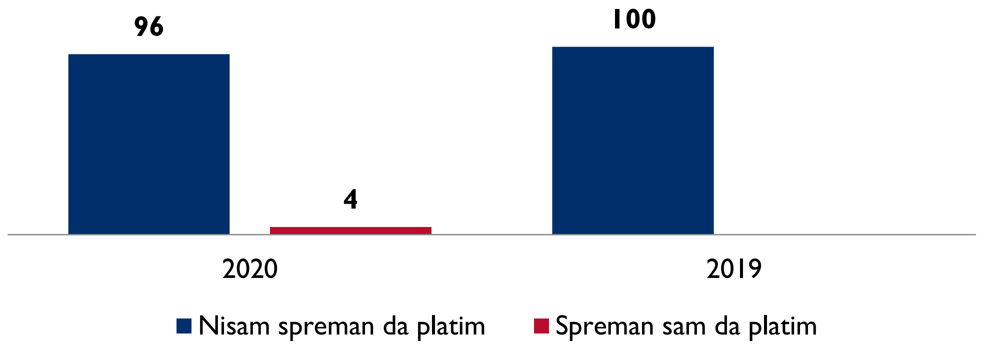
Transl: I am not ready to pay; I am ready to pay

Chart 3.2.4 – *Sports content (broadcasting of matches, tournaments, Champions League) - comparison with the research conducted in 2019 (in %)*



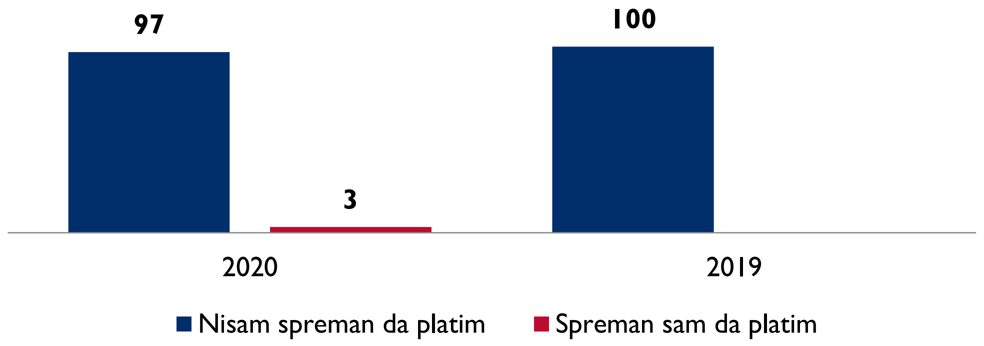
Transl: I am not ready to pay; I am ready to pay

Chart 3.2.5 – *Domestic magazines (in Serbian) - comparison with the research conducted in 2019 (in %)*



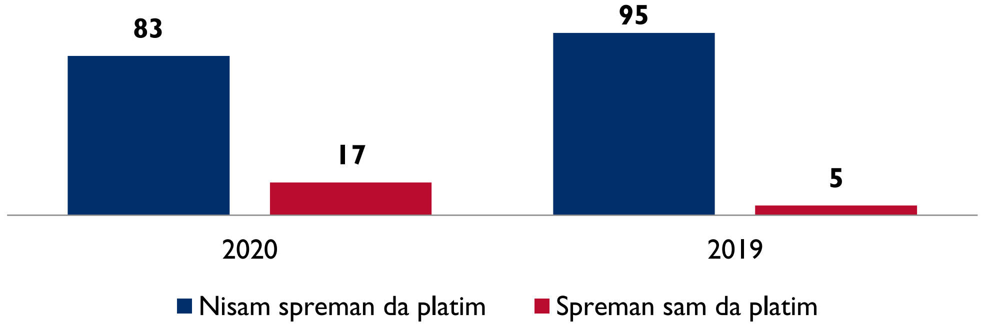
Transl: I am not ready to pay; I am ready to pay

Chart 3.2.6 – *Foreign magazines (in foreign language) - comparison with the research conducted in 2019 (in %)*



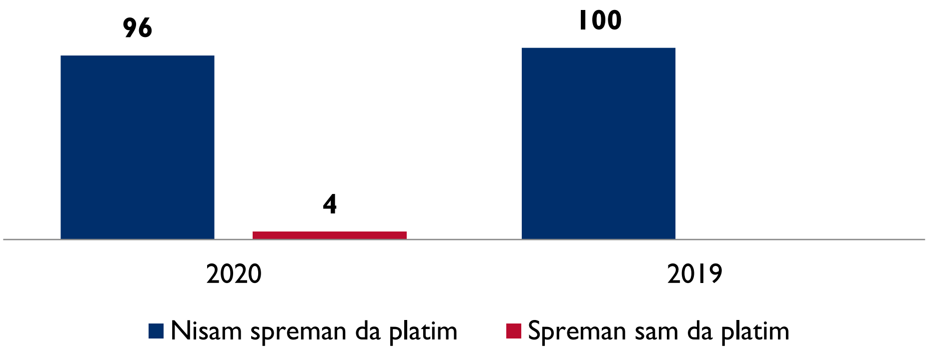
Transl: I am not ready to pay; I am ready to pay

Chart 3.2.7 – *Additional cable TV package (HBO, Arena, SK package) - comparison with the research conducted in 2019 (in %)*



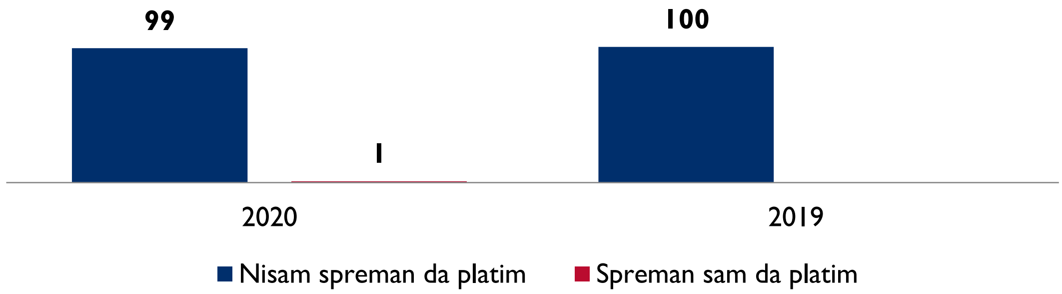
Transl: I am not ready to pay; I am ready to pay

Chart 3.2.8 – *Domestic weekly - comparison with the research conducted in 2019 (in %)*



Transl: I am not ready to pay; I am ready to pay

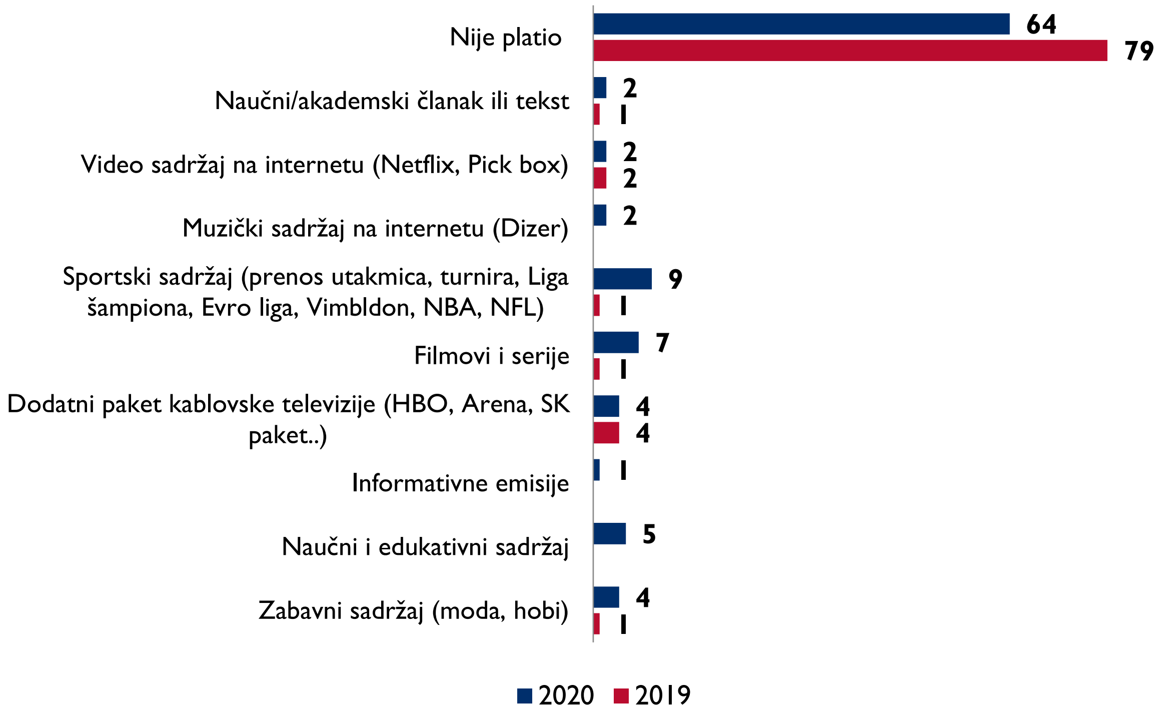
Chart 3.2.9 – *Foreign weekly - comparison with the research conducted in 2019 (in %)*



Transl: I am not ready to pay; I am ready to pay

When it comes to specific content for which respondents would be willing to pay for access in the future (respondents should have chosen only one answer from the previous list), SMS learned that the largest percentage of respondents would not pay for any content, and that was also the case in a research conducted in 2019 (Chart 3.2.10). However, **it is noticeable that in a year and a half the percentage of respondents who would not pay anything for access to some of the content, decreased significantly by 15 percentage points, so today 64% of respondents would not pay anything, while in 2019 that percentage was 79%.** Almost a tenth of respondents (9%), when asked about specific content that interests them the most and for which they would pay subscription, mention sports-related content, which was not the case in 2019. 7% of respondents would pay for movies and series, which is 6 percentage points more than in 2019. 5% of respondents would pay for additional cable TV packages, which also was the case in 2019. In 2020, respondents would pay for scientific and educative content (5%), while 2019 no one gave such an answer. A total of 10% of respondents would pay for access to following specific contents: scientific/academic article or text (2%), online video content (2%), online music content (2%), news programs (1%) and entertainment content (4%).

***Chart 3.2.10 –** Now please think about <u>specific content</u> you would most likely pay for in the <u>future</u>, what is it about, what would you be willing to pay – the name of the show, the program, the specific content…? - comparison with the research conducted in 2019 (in %)*



Transl: Didn't pay; Scientific/academic article ir text; Online video content (Netflix,Pick box); Online music content (Deezer); Sports content (broadcast of matches, tournaments, Champions League, Euro League, Wimbledon, NBA, NFL); Movies and series; Additional cable TV package (HBO, Arena, SK package..); News shows; Scientific and educative content; Entertainment content (fashion, hobbies..)

When SMS compared the research conducted in 2020 with 2019's, it recognized there is no drastic difference in answers why they would pay for some content, except for the respondents who would pay for access if it deals with topics that are personally important and interesting – Table 3.2.1.

The most important reason why respondents would pay for access to some media content is that the media deals with topics that are important and interesting to them – 28%, while in 2019 this percentage of respondents was ten percentage points lower. 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) and the third most important reason to pay for access to media content, respondents stated was the cost is negligible (8% of respondents).

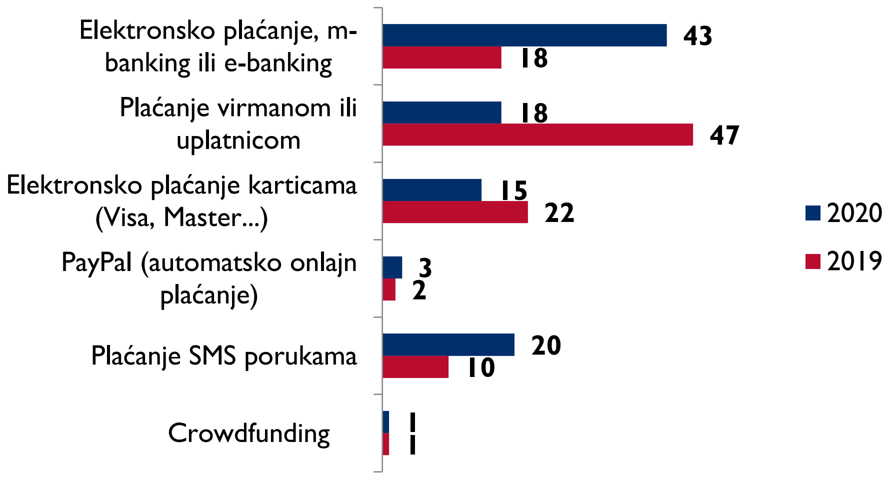
***Table 3.2.1 –** What are the most important <u>reasons</u> to pay for access to some media content? - comparison with the research conducted in 2019 (in %)*

	Yes, I would pay for this		No, I wouldn't pay for this	
	2019	2020	2019	2020

The cost is negligible	6	8	94	92
Because payment is easy	4	5	96	95
With access to paid content I get something else (gift, goods, services…)	3	4	97	96
Deals with topics that are important and interesting to me personally	18	**28**	82	72
Gives me access to information that not everyone has	7	**11**	93	89
I can be the first to know some information that others cannot	3	4	97	96
I wish to support idea/mission and concept	3	5	97	95

Media content can be paid by electronic payment, m-banking or e-banking, payment slip or bank transfer, electronic payment (card), PayPal (limited), or "Crowdfunding" (via online platform, which is direct financial support of the audience). **Electronic payment and m-banking or e-banking were the payment methods that suited respondents most in 2020 –** 43% of respondents. When SMS compared data with the research conducted in 2019, it discovered that the percentage of respondents to whom the above mentioned method of payment was the most suitable, is significantly lower, by 25 percentage points. In the 2019 research, respondents were most comfortable with paying for media content by payment slips or bank transfers (47%), which was not the case in the reasearch conducted in 2020 – this method of payment was most suitable for 18% of respondents or 29 percentage points less. 15% of repondents chose electronic card payments, which is 7 percentage points less than in the 2019. 20% of respondents in 2020's research state that this method of payment suits them best, while in 2019 one in every ten respondents stated this. PayPal and "Crowdfunding" as ways of paying for media content are not common in Serbia, for various reasons.

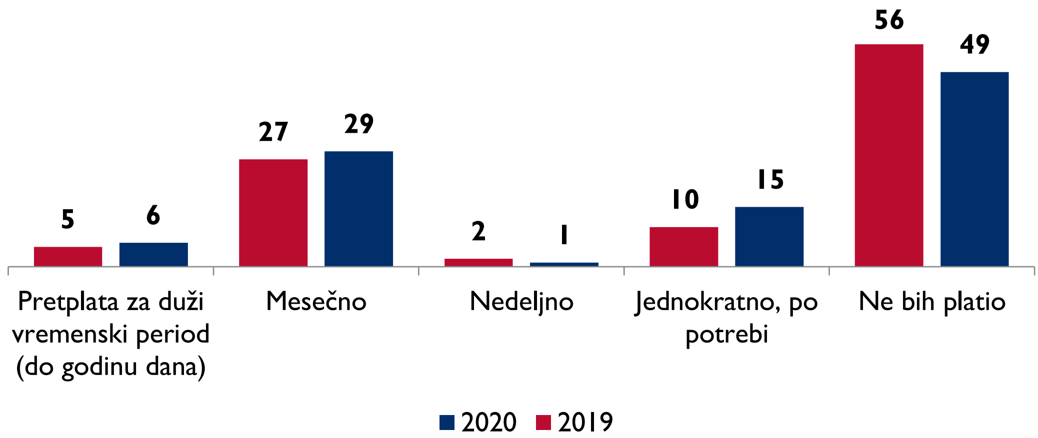
Chart 3.2.11 – *Which way of paying for media content suits you best? - comparison with the research conducted in 2019 (in %)*



Transl: Electronic payment, m-banking or e-banking; Payment slip or bank transfer; Electronic card payment (Visa, Master..); PayPal (authomatic online payment); SMS payment; "Crowdfunding"

SMS saw an increase in respondents who would pay monthly for media content (research in 2020 – 29%, research in 2019 – 27%) and an increase in respondents who would pay one-time, if necessary, for media content (research in 2020 – 15%, research in 2019 – 10%). When it comes to subscriptions for a longer period of time (up to a year) and one-time payment when needed, there are no significant differences compared to research conducted in 2019.

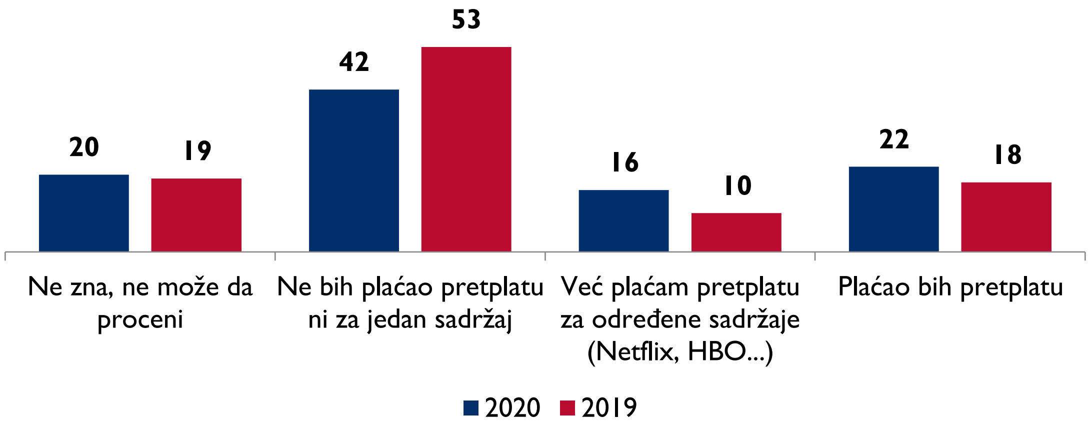
Chart 3.2.12 – *What is your preferable dynamics for paying the media content? - comparison with the research conducted in 2019 (in %)*



Transl: Long-term period transition (up to a year); Monthly; Weekly; One-time, when needed; I would not pay

When asked whether and what amount of money would they be willing to set aside on a monthly basis if the content they regularly follow introduced subscription, the largest percentage of respondents in both research cycles answered that they would not pay a subscription for any content – Chart 3.2.14. Even though there is the largest percentage of respondents who would not pay for any media contents in both research cycles, SMS noticed that the willingness to pay for media content has increased compared to 2019. **42% of respondents today state they would not pay for any media content, which is 11 percentage points less than 2019. 22% of respondents would pay a subscription, which is 4 percentage points more than 2019.** When it comes to susbsription increasement, SMS also noticed it in respondents who already pay a subscription for the content they are interested in, so in 2020's research that percentage of respondents is 16%, while in 2019 every tenth respondent paid subscription. A fifth of respondents (20%) state that they do not know or cannot estimate whether and what amount of money they would set aside if some of the contents they regularly follow introduced a subscription, and there is no significant difference in this answer compared to 2019 (19%).

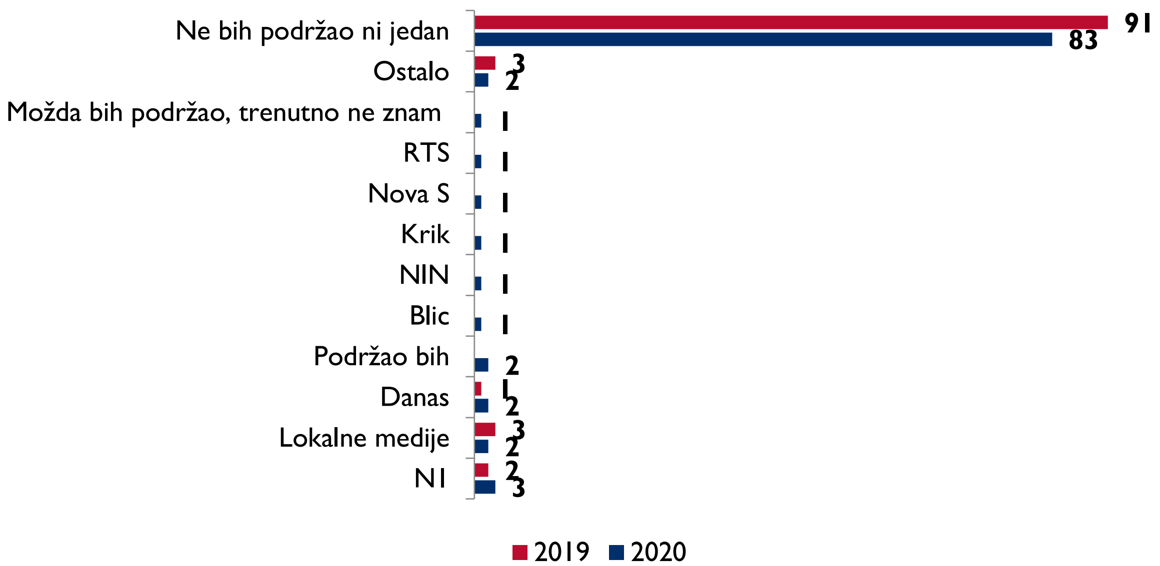
Chart 3.2.13 – *If some of the contents you regularly follow introduced a subscription, would you and what amount of money set aside on a monthly basis? - comparison with the research conducted in 2019 (in %)*



Transl: Don't know, cannot assess; I wouldn't pay subscription for any content; I already pay subscription for specific content (Netflix, HBO..); I would pay subscription

When it comes to supporting media that are financially vulnerable and whether respondents would be willing to financially help, SMS learned that a large percentage of respondents in both research cycles stated they would not support any media – chart 3.2.15. In the research conducted in 2020, 83% of respondents had this stance, while in 2019 this was 91% of respondents. On the other hand, 3% of respondents would financially support TV N1 (2019 – 2%), which is an outlet that stood out. 2% of respondents would support local media, while that percentage was slightly higher in 2019 (3%). At the same time, 2% of respondents would financially support the newspaper Danas (2019 – 1%), and a total of 5% of respondents would provide financial support to the following media: Blic, NIN, Krik, Nova S and RTS.

Chart 3.2.14 – *Is there a media that you would personally financially support if its funding would be jeopardized or at stake? - comparison with the research conducted in 2019 (in %)*



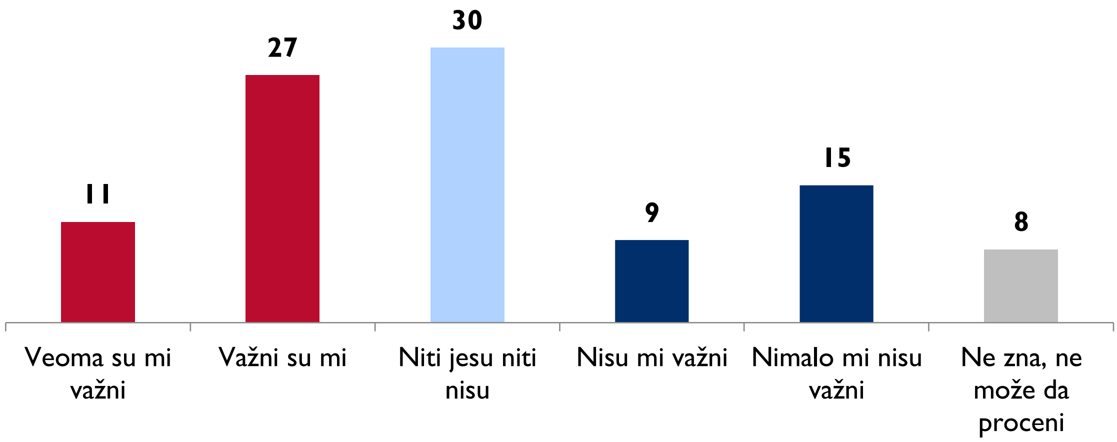
Transl: I wouldn't support any; Other; I might support, but I don't know now; RTS; Nova S; Krik; NIN; Blic; I would support; Danas; Local media; N1

4. Willingness to support Independent and Local Media

Independent media in this research are those media that deal with investigative journalism or journalism that critically analyzes the most difficult topics in society. In this section, SMS will present how much are citizens of Serbia ready to support this type of media. After that, SMS will briefly look at the local media support that is endangered due to reduced opportunities for sustainability, and can also compare these findings with the 2019 research.

The importance of independent media was recognized by a total **38% of respondents who stated that independent media are very important or important to them** – chart 4.1. On the other hand, 24% of respondents stated that independent media are not important to them. 30% of respondents had a neutral viewpoint about the importance of independent media, while 8% of respondents did not know or could not estimate how important independent media was to them. This tells us that there is an awareness in this target group about the importance of independent media in society. **Respondents who stated above average that independent media are important to them, received a higher education (faculty, college, high school, master's study and doctoral study), lived in urban areas, and were between 30 and 39 years old.**

Chart 4.1 – *How important are independent media to you? (in %)*

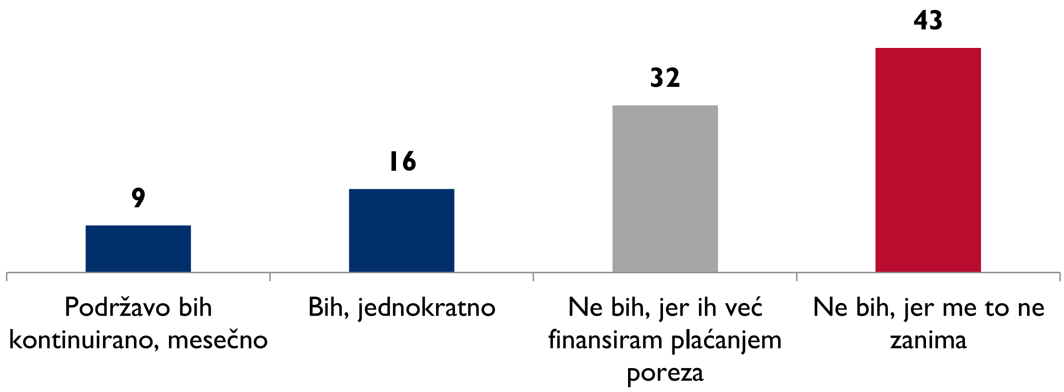


Transl: Very important; Important, Nor yes nor not; Not important; Not important at all; Doesn't know, cannot assess

When it comes to financial support of independent media, the largest percentage of respondents would not support the work of independent media, because they are not interested in the media nor the work they do (43%). Another third of respondents (32%) would not financially support the work of independent media. A total of 75% of respondents would not be willing to financially support the work of independent media in Serbia. **16% of respondents would be willing to pay one-time financial assistance, while 9% of respondents would provide continuous support.** One-time and monthly financial assistance would be provided above average by respondents who are highly educated, who live in urban areas, and are 30 to 39 years old.

What can be interpreted from these findings? Firstly, one percent of respondents declared support that is not related to supporting them financially. Secondly, when it comes to the issue of support, respondents with neutral responses, start to group around those who find these media outlets unimportant. Lastly, independent media does not always mean the same or what is acknowledged in public, and therefore some respondents are not ready to support them because they already support them through paying taxes (which primarily alludes to the public services role).

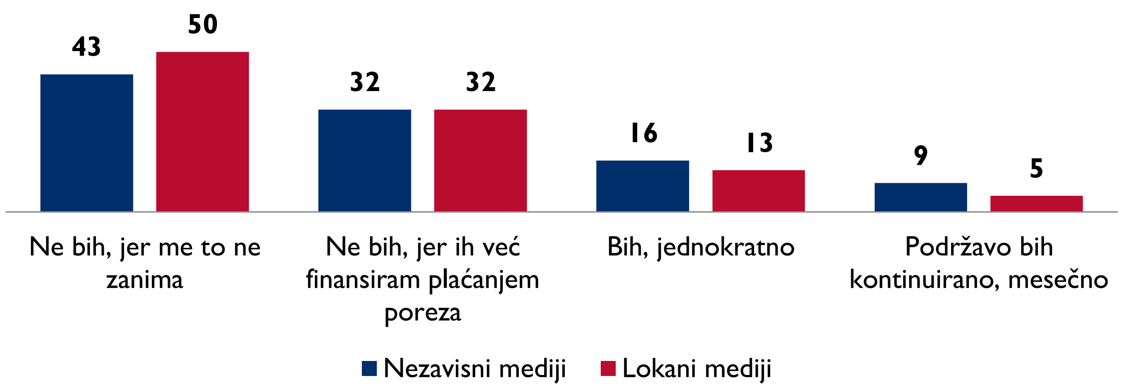
Chart 4.2 – *Would you be ready to financially support work of Independent Media? (in %)*



Transl: I would support continuously, monthly; I would, one-term; No, I already finance them by paying taxes; I wouldn't, I am not interested in that

When SMS compared how many Serbia citizens are willing to financially support work of local (see below) **and independent media,** SMS noticed that a larger number of respondents would financially support the work of independent media, a total of 25%, while 18% of respondents would financially support the work of local media – chart 4.3. SMS crossed these two questions and obtained data that a large percentage of respondents who would not support the work of local media also stated that they would not support independent media either.

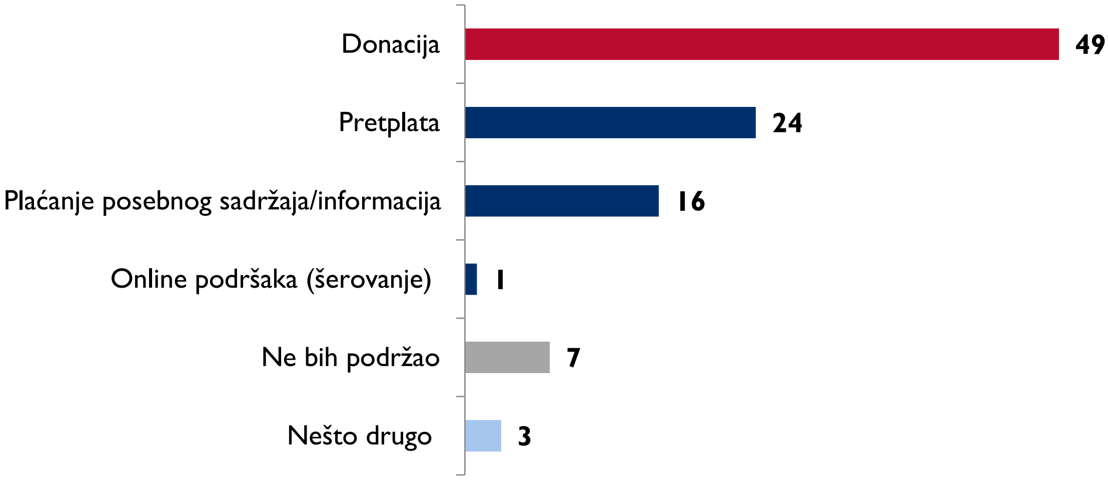
Chart 4.3 – *Comparative presentation of respondents' readiness to provide financial support to the work of local and independent media in Serbia (in %)*



Transl: I wouldn't, I am not interested in that; No, I already finance them by paying taxes; I would, one-term; I would support continuously, monthly

The model of support of independent media that suits respondents the most is donations, almost half of the respondents (49%) shared – Chart 4.4. Subscription is the second model of support that suits respondents the most (24%), while the payment of specific content/information (16%) comes third. Only 1% of respondents stated that they would support independent media online in the form of sharing posts, while 3% of respondents state that they would support some other way of supporting work of independent media.

***Chart 4.4 –** Which model of Free Media Advocacy suits you best? (u %)*



Transl: Donation; Subscription; Payment of specific content/information; Online support (sharing); I wouldn't support; Something else

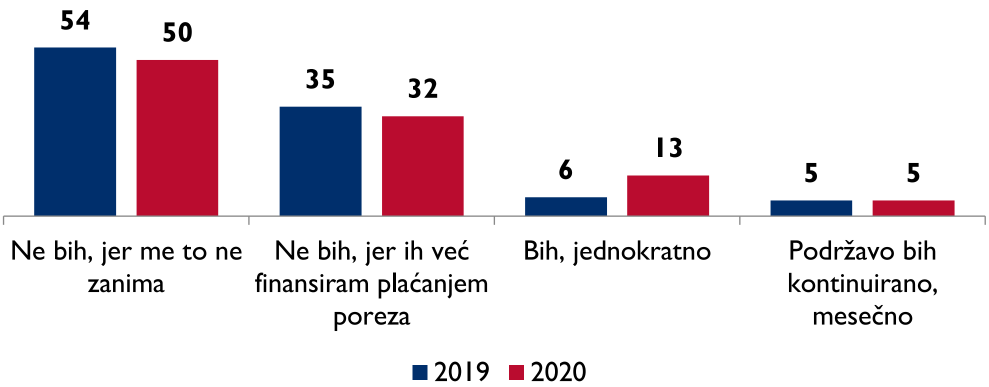
The most common reason that prevents respondents from supporting the work of independent media are financial (49%), while the second most common reason is not being informed of the ways in which they can support the work of independent media (27%) – Chart 4.5. Complicated payment procedures are the reason that prevents 6% of respondents from supporting the work of independent media, while a total of 2% of respondents stated that they do not trust the media and are not interested in this type of media. Every tenth respondent stated that nothing prevents them, and that independent media have unreserved support, while only 1% of respondents stated that they already pay a subscription to independent media.

***Chart 4.5 –** What could prevent you from financially supporting independent media? (in %)*

Transl: Financial possibilities; I am not informed of the ways…; Nothing, they have my unreserved support; Complicated payment procedures; I have no interest for independent media; I pay subscription; I don't trust media; I wouldn't pay; Something else

The willingness of respondents to financially support the work of local media in their city is weak and they would not be supported by a total of 82% of respondents – Chart 4.6. SMS noticed that the willingness of respondents to financially support the work of local media was somewhat higher in 2020 compared to the research conducted 2019. A total of 82% of respondents would not financially support local media, which is 7 percentage points less than in 2019. **Half of respondents stated that they would not support local media financially because they are not interested, while that percentage of respondents in 2019 was higher by 4 percentage points** (54%)**.** A third of the respondents (32%) stated that they would not support them financially because they are already financing them by paying taxes, which is 3 percentage points less than in the previous year. A total of 18% of respondents would financially support the work of local media – one-time by 13% of respondents, while 5% of respondents would continuously support local media. As mentioned, the percentage of respondents who would financially support the work of local media increased compared to 2019, so only 6% of respondents in the 2019 research stated that they would provide one-time assistance to local media, which is 7 percentage points less compared to in 2020's research. The same percentage of respondents in both research cycles would provide continuous assistance. Respondents who stated that they would be willing to financially support the work of local media continuously and one-time, would be willing to set aside an average of 866.00 dinars, while in a research conducted in 2019, the average amount of money that respondents would be willing to set aside was 750.00 dinars.

Chart 4.6 – *Would you be willing to financially support the work of local media in your city?*

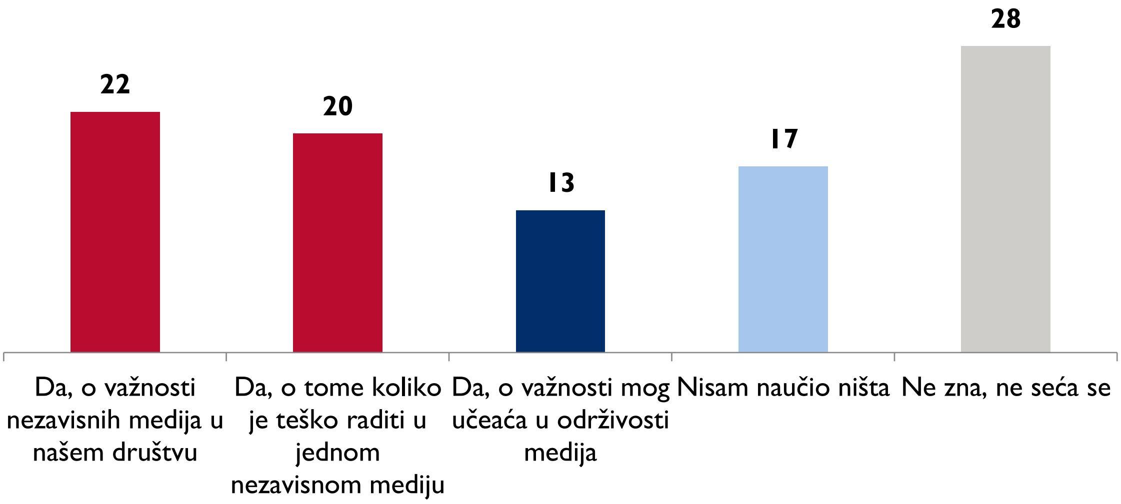


Transl: I wouldn't, I am not interested in that; No, I already finance them by paying taxes; I would, one-term; I would support continuously, monthly

5. Effects of the Free Media Advocacy Campaign

The effects of the campaign to support independent media are significant for respondents who have heard of this campaign. The largest percentage of respondents**, a total of 55%, stated that they learned something from the "Support the Media" campaign -** Chart 6.1. From the campaign, 22% of respondents learned about the importance of independent media in society, while a slightly smaller percentage of respondents (20%) learned how difficult it is to work at an independent media outlet. 13% of respondents learned about the importance of participating in media sustainability from this campaign. On the other hand, 17% of respondents stated that they did not learn anything from the "Support the Media" campaign. A little more than a quarter of the respondents (28%) stated they did not remember/ did not know if and what they learned from this campaign.

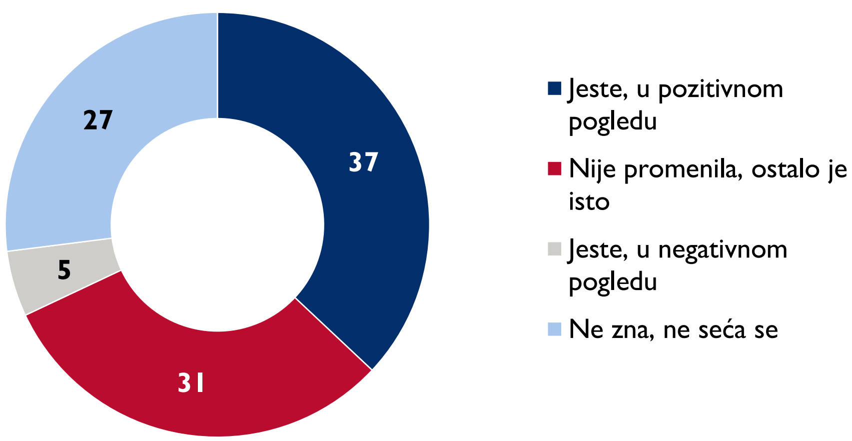
Chart 5.1 – *Did you learn anything from "Support the Media" campaign? (in %)*



Transl: Yes, about the importance of independent media in our society; Yes, how hard it is to work in an independent media; Yes, about the importance of participating in media sustainability; Have not learn anything; Does not know, does not recall

The "Independent Media Depend on You" campaign positively changed the opinion about the media and the importance of supporting independent media with 37% of respondents - Chart 6.2. On the other hand, this campaign changed the opinion of the respondents, but only 5% of the respondents stated it changed in a negative way. The campaign did not change the stance of 31% of respondents about the media and the importance of supporting independent media. 27% of respondents stated that they did not know or remember whether this campaign changed their opinion about the media and the importance of supporting independent media.

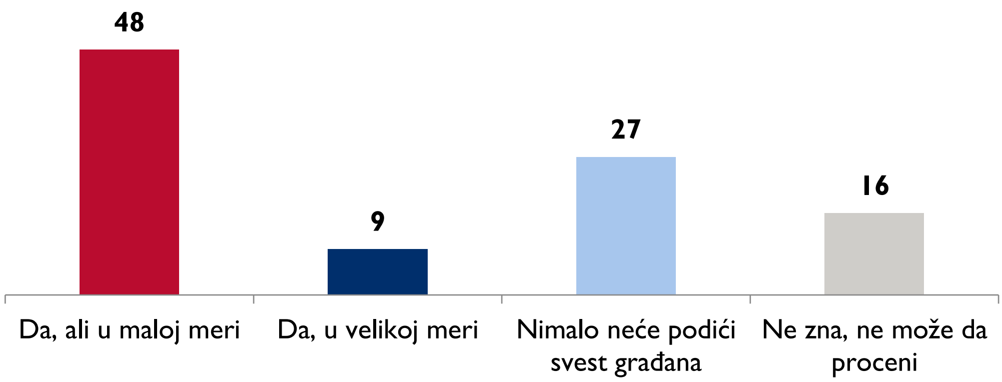
Chart 5.2 – *Did campaign "Support the Media" changed your opinion about the media and the importance of supporting independent media? (in %)*



Transl: Yes, positively; Has not changed; Yes, negatively; Does not know, does not recall

There is skepticism and caution among citizens about the effects on raising awareness. According to the opinion of the largest percentage of respondents (48%), the "Independent Media Depend on You" campaign slightly raised the awareness of the citizens of Serbia in relation to the media and support for independent media – chart 6.3. 9% of respondents stated that this campaign greatly raised the awareness of the citizens of Serbia in relation to the media. On the other hand, 27% of respondents believed that the "Support the Media" campaign would not raise the awareness of Serbian citizens in relation to the media and support for independent media. 16% of respondents did not know/ could not evaluate whether this campaign will raise the awareness of citizens.

***Chart 5.3 –** Do you think that this campaign will raise the awareness of the citizens of Serbia in relation to the media and support for independent media? (in %)*



Transl: Yes, it will slightly; Yes, it will greatly; Will not raise citizens' awareness at all; Does not know, cannot assess

6. Concluding remarks

The results of the research show slow but visible changes in the attitude of citizens towards payment for media content. Compared to the beginning of 2019, the percentage of citizens who showed readiness to pay for content increased, which is certainly a consequence of media programs and campaigns, but is also a consequence of the COVID-19 pandemic. The pandemic caused longer stays at home, which led to increased consumption of various content, primarily those of an entertaining or sports nature, along with movies and series. **The increased readiness did not affect the increase in the amounts they are willing to pay, which was expected given the financial situation, but no dramatic decline was noticeable.** The good news for all participants in the media industry, is the increase in preferences regarding card payments to the detriment of payment slips or bank transfers.

Compared to the beginning of 2019, media consumption decreased, but the reasons for such a trend should be sought at the time when the research was conducted. As expected, the consumption of the media was higher in 2019, because the research was conducted in a very cold month of February that year, which affected the reduced movement of citizens. In 2020 the research was done during the autumn and between the second and third wave of the pandemic, which influenced the citizens to stay outside more often. The trends on media type consumed per day remained the same, with television and radio in the first two places, followed by social networks, portals and, finally, printed press. Since the target group excluded people under the age of 25, it was expected that the influence of social networks decreased, and the influence of the mainstream media increased. Distrust in the media is still high and there is no difference compared to 2019.