

EXACTA RESEARCH GROUP



PROJECT TITLE: ‘MEDIA PREFERENCES OF THE BULGARIAN AUDIENCE DURING THE ELECTION CAMPAIGNS FOR THE PARLIAMENTARY ELECTIONS HELD ON 4 APRIL AND 11 JULY 2021’

(Comparative analysis based on data from two nationally representative surveys by Exacta Research Group commissioned by CEM conducted in the final week of each of the two election campaigns.)

Profile of the surveys

The first survey was conducted between 23 and 30 March 2021 by Exacta Research Group’s nationwide network of interviewers. The second survey was conducted between 30 June and 6 July.

In both surveys, 1005 adult Bulgarian nationals were interviewed face-to-face at 123 nodes in 92 locations across the country. The total number of individuals interviewed in the two surveys conducted in the framework of the project was 2010.

The registration and sampling methodologies ensure comparability of the information collected and thus allow a comparison to be made between the outcomes from the two surveys.

COMPARATIVE ANALYSIS

Over the last four months we have witnessed two campaigns for parliamentary elections. This turned out to be a unique opportunity to perform a sociological measurement of how the role and functions of (traditional and web-based) media are perceived in an election environment. The data collected in the two nationwide surveys conducted by Exacta in the final weeks of the two campaigns provide an opportunity to discuss the more enduring attitudes as well as the more dynamic ones.

Which media do Bulgarians rely on for information about the course of the election campaign?

The data indicates that there are no significant differences between the media preferences of Bulgarians registered in March and July 2021 in the course of the two election campaigns. There was a slight increase of interest in TV channels, websites and media portals in July. Also in July, interest in social media, radio channels and printed newspapers declined slightly.

In July, the share of those indicating that they are not at all interested in the election campaign and do not seek information about it in the media decreased slightly (from 22% to 19%). This is more often stated by non-voting young people aged between 18 and 40, poor Bulgarians and representatives of minorities.

Television channels are the media from which most Bulgarians — 74% in March and 75% in July — obtain information about the election campaign. TV is the preferred source of information across all socio-demographic groups of respondents. However, we observed a clear generational specificity of the responses — the share of those using television as a source of information for both election campaigns decreases significantly in the younger age groups. Among people aged 60 and over, those who obtain information from TV broadcasters accounted for 84%, while among the youngest, aged under 30, the proportion was significantly lower at 50%.

In March, social media ranked second as a source of information after TV, while websites ranked third. In July, websites were the second most popular source of information, with social media receding to third place.

In July as well as in March, the respondents seeking information about the election campaign

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from three media concurrently accounted for the largest share of the sample (39%), followed by those who sought information from more than three media (37%). Between March and July the share of those who preferred to keep themselves informed from two media remained unchanged at 23%.

In July the share of those who said they obtain information from one media only increased by 5% from the level in March, namely from 16% to 21%. Adults over 60, rural residents and poorly educated people tend to rely more often on a single media as a source of information.

Where do Bulgarians prefer to follow developments on the election day — in the traditional media or on the Internet? The question was only asked in the July survey.

The data reveals that the people who prefer traditional media as a source of information during the election day outnumber by nearly 3.5 times those who choose to obtain information from the Internet (the ratio is 73% to 21%). The Internet is the preferred information channel for the youngest, namely those below the age of 30. All other groups prefer traditional media to the Internet.

Which TV channels do Bulgarians usually watch on election day?

This question was only asked in the July survey. 88% gave names of specific TV channels from which they received their information and the remaining 12% said they usually do not watch TV on election day. The most preferred TVs are the three on-air broadcasters (84.5% of Bulgarians prefer one of them on election day). 35% of the respondents in the July survey said they preferred to watch bTV on election day and 30% preferred the election-day programme of Nova TV. Nova TV is preferred over bTV by the youngest respondents under 30 years of age, by the highly educated respondents, by those living without deprivation and by those residing in the capital city Sofia. bTV is preferred on election day over Nova TV more often by residents of regional centres and villages, as well as by respondents with secondary education. 19% of those interviewed in July said they preferred to watch the Bulgarian National Television (BNT) on election day. These tend to be people aged 60 years and over, respondents with primary education and people living in significant deprivation.

Which radio programmes do Bulgarians usually listen to on election day?

This question was only asked in the July survey.

69% of those who participated in the July survey said they do not listen to any radio on

election day. The majority of these are young people aged between 18 and 40. Those who said they do listen radio on election day accounted for just under 31% of the interviewees. One-fifth of all radio listeners said they prefer the Bulgarian National Radio (BNR). Election day is followed on radio more often by the elderly over 60, people with primary education and poor people. For some of them radio is a habit, but probably they also lack access to competing and ‘more modern’ sources of information.

Apart from BNR, Darik is the only radio channel which received a statistically significant share (4%) as a source of information on election day.

Which TV media do Bulgarians trust more during an election campaign — the public broadcaster BNT or the private TV channels? This question was asked both in March and in July. The comparative analysis shows that in July the share of people who trust the public broadcaster BNT decreased by 3 points, while the people who placed their confidence on private TVs increased by twice as much — by 6 points. In July, the share of those who distrust both public and private TVs also fell slightly (from 13% in March to 11% in July).

While in March the ratio between those trusting private TV channels and those trusting the public BNT was 35% to 27%, in July the ratio was already 41% to 24% in favour of those trusting private broadcasters more than BNT.

In July we registered above-average trust in private TV channels compared to the public BNT among people aged between 18 and 50 years, among highly educated respondents, among citizens of Sofia and among those living without deprivation.

Trust in BNT is higher than in private TVs among people over 60, among the poor and among people with primary education.

Which private TV stations do Bulgarians trust more than the public BNT? This question was asked both in March and in July.

The March survey captured that, among the politically active respondents, the supporters of the ruling parties tended to trust the largest private TV channels, bTV and Nova TV, while the supporters of opposition parties relied entirely on other private TV broadcasters. In July, as little as 7% said they trusted only private TV stations other than the two large ones. *The data provides indirect evidence that the altered political environment following the elections on April 4 has made people less likely to seek alternative sources of information, as was the case with some cable and satellite TV stations before the vote.*

Which radios do Bulgarians trust more during an election campaign — the public broadcaster (BNR/Horizont and Hristo Botev) or private radio channels? This question was asked both in March and in July.

In both March and July, the people who trusted the public broadcaster (BNR) during the election campaign period outnumbered those who had more trust in private radios by a factor of three. In July, those who trusted public radio more were 27% and those who trusted private radios more were 8%, while the ratio in March was 30% to 11%.

Public radio is most often trusted by adults over 60, respondents with primary education, interviewees with a low standard of living and residents of Bulgarian small towns. Trust in private radios is more often declared by people aged 40—49 years as well as by those living without deprivation and citizens of Sofia.

In July, the proportion of people who were unable to decide which radios they trust more — the public or private ones — grew by 3% (from 41% to 44%). In these recent months, the proportion of those saying they do not trust any radio, be it public or private, has also increased by 3% (from 18% to 21%).

Which private radios do Bulgarians trust more than the BNR? This question was asked in both surveys. A total of 8% in July said they trusted private radio more than they trusted the BNR. Excluding the BNR, Darik Radio has maintained its position since March as the private radio that garners the most trust.

Which type of media do Bulgarians trust more — traditional media (radio and television) or media based entirely on Facebook (websites, portals)? This question was asked both in March and in July.

Preferences weigh on the side of traditional media. Between March and July, the share of those who trust traditional media grew by 3% (from 72% in March to 75% in July), while the share of those who trust media located entirely in the Internet, such as websites, portals, etc., decreased by 3% (from 28% to 25%). Trust in traditional media is higher across respondents from all socio-demographic groups. The exception are young people under the age of 30 — 56% of them trust Internet-only based media more than traditional media. Adults over 60, on the other hand, rely almost entirely on traditional media.

Where do Bulgarians prefer to obtain information from — websites or social media? This question was asked both in March and in July.

32% of the respondents in both surveys preferred to obtain information about the electoral situation from websites. These are mainly people between 30—39, university graduates and people living without deprivation. 22% in March and 19% in July said they prefer to receive information from social media, the majority being young people aged between 18 and 40.

In July, the share of Bulgarians who do not have a preferred source of information or do not distinguish between the various web-based sources of information — websites or social media — increased by 3% compared to March (from 46% to 49%). Typically these are elderly people over 60 years of age, rural residents, people with primary education and low standard of living.

How important are the characteristics of the information provided by a media outlet in an electoral situation for the credibility of that media outlet? This question was asked both in March and in July. In both surveys, Exacta probed the public's opinion about the importance of information characteristics such as: objectivity, comprehensiveness, credibility and timeliness. We did not observe any dynamics in the data between March and July — all the tested characteristics were identified as important for the credibility of a media by more than three-fourths of the respondents. The lower importance attributed to the characteristics 'timeliness' and 'comprehensiveness' is probably due to a misunderstanding of the specific meaning of these concepts. This is confirmed by the data on the educational profile of the respondents who participated in the survey.

What kind of events during election campaigns do Bulgarians follow on traditional media (radio and television)? This question was asked both in March and in July.

The dynamics of public interest in the traditional media coverage of the two election campaigns comes down to the following:

1. In July there was a marginal decline of the public's interest in the election debates (from 71% to 66%);
2. In July there was a marginal increase of interest in the main events and initiatives of the parties during the campaign, such as dedicated coverage of election events immediately after the news broadcasts of the electronic media (from 57% to 61%);
3. In July we observed somewhat higher interest in the explanations of the voting process provided by the Central Electoral Commission (CEC), from 60% to 64% (the increase was probably linked to the large-scale use voting machines);

4. In July we also measured somewhat higher interest in the polls of the polling agencies on the electoral attitudes/preferences (from 60% to 64%);
5. In July the public interest in scandals and compromising materials about political parties and MP candidates increased slightly (from 60% to 63%);
6. In both March and July, interest in political advertising (TV spots and radio spots) remained relatively low at 41% to 40%).

A socio-demographic analysis of the data shows that the debates on traditional media (radio and TV) in July were more often followed by people over 60 years of age, university graduates and residents of the capital city Sofia. The ones interested in CEC's explanations are mainly elderly people as well as poorly educated people. The polls of the polling agencies attract interest mainly from politically active respondents. Middle-aged people, Sofia citizens and politically active respondents are more often interested in scandals and compromising materials. Campaigning events organised by political parties attract interest from respondents aged over 50 and residents of small towns. Political advertising (TV spots and radio spots) is not very popular among young Bulgarians, among minorities and among the politically apathetic.

What do Bulgarians think about the publishing of intermediate exit poll data in the course of the election day (before the final/official conclusion of the election day) — is it right or wrong? The question was only asked in July.

51% of those interviewed in July believe that media should release interim exit poll results before the final/official close of the election day. 25% share the opposite opinion. Respondents who support the publication of intermediate results are widely present across all socio-demographic groups. Those opposed to the public disclosure of such data in mass media are people with primary education and adults over 60.

Are Bulgarians interested in media publications of intermediate results from exit polls before the end of the election day? The question was only asked in July.

56% are interested in such information in the media. This interest is more often expressed by people aged between 30 and 50 years, university graduates and residents of regional centres.

Where do Bulgarians seek intermediate results from exit polls before the end of the election day? The question was only asked in July.

Those who seek media information about intermediate exit poll results before the end of the election day often check more than one media outlet for this purpose. Typically they follow

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the media that commission exit-poll type of surveys, namely the major TV channels Nova, bTV and BNT, as well as BNR. Social media and certain websites are checked by 8% each by those looking for intermediate results. These users obviously know which web-based media outlets manage to obtain intermediate data in the course of the election day.

SUMMARY OF THE COMPARATIVE ANALYSIS

1. The March and July surveys demonstrate that preferences for and trust in the mainstream media during elections are driven by enduring attitudes among the key socio-demographic groups of the Bulgaria's population.

2. In both surveys, TV channels emerged as the leading source of information about the election campaign. We registered a clear generational specificity of preferences — the share of those relying on TVs as a source of information decreases in the lower age groups of respondents.

3. Most of the respondents obtain information about the election campaign from three or more media outlets concurrently. The use of different sources of information is a function of peoples' education and experience. The respondents' age, education level and standard of living are the factors that determine their media preferences in the pre-election period.

4. Traditional media are preferred over web-based media by all socio-demographic groups except the youngest under 30 years, who prefer information from Internet-based media.

5. 88% of the respondents in the July survey named specific TV channels they usually watch on election day. The most preferred broadcasters are the three on-air TV channels — bTV, Nova TV and BNT (84.5% of all respondents prefer one of them).

6. 69% of the respondents in the July survey said they do not listen to any radio on election day, while 19% said they prefer to tune to the programmes of the Bulgarian National Radio (BNR) on election day. Those who use more often radio to obtain information in the course of the election day are the groups of the elderly, of the low-educated and of the poor people.

7. In July, the share of those who trust the public TV broadcaster BNT decreased by 3 points compared to those who trust private TV broadcasters. At the same time, the share of those

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who trust private TV stations more than BNT increased by 6 points compared to the level observed in March.

8. In both March and July, the people who trusted the public radio broadcaster (BNR) in the pre-election period outnumbered those who trusted private radios by a factor of three.

9. Traditional media are more trusted than web-based media. We found that between March and July the respondents who trust traditional media more than web-based media had increased by 3% (from 72% to 75%). During that period, the share of those who tend to trust web-based media rather than traditional media declined by 3% (from 28% to 25%). The exception are young people under the age of 30 — 56% of them trust Internet-only based media more than traditional media at a ratio of 56% to 44%.

10. 32% of the respondents in each survey preferred to obtain information about the electoral situation from websites. In the past few months there has been a marginal decrease of the share of people who prefer to obtain information from social media (Facebook, Twitter, Instagram, etc.) — from 22% in March to 19% in July.

In July, the share of respondents who do not have any preference for or do not make any difference between the various web-based sources of information increased by 3% (from 46% to 49%).

11. Comparable and consistently high in both surveys remain the requirements to the characteristics of the information appearing in mass media — credibility, objectivity, timeliness and comprehensiveness

12. In July we observed higher interest in the main components of the election campaign — debates and political events, as well as in the CEC's explanations of the voting process and in the data provided by polling agencies. Interest in political advertising remains the weakest.

13. In the July survey we observed that 56% of Bulgarians are interested and have already developed habits to seek information about intermediate results from exit polls before the end of the election day. Most of them know which media outlets commission exit polls and follow exactly these outlets.

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14. The July survey revealed that the people wishing to have access to information about intermediate results in the course of the election day outnumber by more than two times those who believe that such information should not be made public at all (51% vs 25%).