

EXACTA RESEARCH GROUP



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

(A comparative analysis using data from two nationally representative surveys done by the Exacta Research Group, commissioned by the Council for Electronic Media (CEM) and conducted during the last week of each of the two election campaigns)

Passport of the Surveys

The first survey was conducted during the period 23—30 March 2021 by the national survey network of the Exacta Research Group. The second survey was conducted during the period 30 June—6 July.

Each of the surveys involved face-to-face interviews with 1 005 adult Bulgarians in 123 clusters in 92 settlements in the country. A total of 2 010 individuals were interviewed in the two project surveys.

The registration methodology and the sampling methodology ensure data comparability and enable a comparative analysis between the results of the two surveys.

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COMPARATIVE ANALYSIS

In the last four months we witnessed two parliamentary election campaigns. This turned out to be a unique opportunity to measure sociologically the assessment of the role and functions of the media (both the traditional ones and the internet-based ones) in a pre-election environment. The data from Exacta's two national surveys, conducted during the last weeks of the two campaigns, allow us to comment on both longer lasting attitudes and more dynamic ones.

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

The data shows there were no significant differences between the media preferences of Bulgarians registered in March and in July of 2021 in the course of the two election campaigns.

In July the interest in televisions, websites and media portals increased slightly. Also, in July there was a minimal decrease in the interest in social networks, radio and printed newspapers.

In July there was a slight decrease in the share of people who stated they were completely disinterested in the election campaign and were not looking for any information about it in the media (from 22% to 19%). This was more prevalent in non-voting young people aged 18—40, poor Bulgarians and representatives of minorities.

Televisions were the media that most Bulgarians were using to stay informed about the election campaign — 74% in March and 75% in July. There was no socio-demographic group among interviewees where televisions were not the preferred information source. In addition, we registered a clearly expressed generational specifics of responses — the share of people using television as a source of information in both election campaigns decreased specifically for these age groups. Among people over 60 the ones using television as their main source of information were 84%, whereas the share was considerably lower (50%) for young people below 30.

In March social networks were the second most popular source of information, after televisions, and websites came third. In July websites were the second most popular source of information, and social networks came third.

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In July, as well as in March, the share of people simultaneously using two media types to get informed about the course of the election campaign was 39%, and that of people simultaneously using more than three media types was 37%. There was no change compared to March in the share of people relying on two media types for their information — 23%.

In July people stating they only used one media type to get informed was 5% higher compared to March, from 16% to 21%. This was most common among those aged 60 and above, inhabitants of villages and poorly educated people.

Where do Bulgarians prefer to follow the course of the election day — in traditional media or online? The question was asked only in the July survey.

The data shows that the people preferring to get informed about the election day from traditional media were nearly 3.5 times more than the ones choosing to get informed online (73% : 21%). The internet was the preferred information source for young people below 30. The rest of the population preferred traditional media over online sources.

Shows of which television do Bulgarians usually watch during the election day?

The question was asked only in the July survey.

88% of interviewees stated the names of specific television channels where they obtained their information, and 12% stated that they would normally not watch television during the election day. The three broadcast televisions were the most preferred source of information (a total of 84.5% of Bulgarians preferred one of them on the election day). 35% of interviewees in July stated they preferred to follow bTV during the election day, and 30% stated they preferred the election show of Nova TV. Nova TV was preferred over bTV by the youngest group, aged under 30, by highly educated respondents, by those living without deprivations and by the inhabitants of the capital city. bTV was most often preferred during the election day over Nova TV by the inhabitants of regional cities and villages, as well as by respondents with secondary education. In July 19% of interviewees stated they preferred to watch bTV on the election day. These were usually people aged over 60, respondents with primary education and people living with substantial deprivations.

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The programme of which radio do Bulgarians usually listen to during the election day?

The question was asked only in the July survey.

69% of participants in the July survey stated that they did not listen to the radio during the election day. These are usually younger people, aged between 18 and 40. Those that stated they would listen to the radio during the election day were less than 31% of interviewees. A fifth of the people listening to the radio stated that they preferred the programme of the Bulgarian National Radio (BNR). The election day is mostly followed on the radio by older people, above 60, people with primary education and the poor. For some of them radio is a habit but many are probably also lacking access to competitive and more modern sources of information.

Out of the radio stations mentioned as a source of information for the election day, only Darik has a statistically significant share of 4%, other than the BNR.

Do Bulgarians trust the Bulgarian National Television (BNT) or private televisions more during an election campaign? The question was asked in both March and July.

The comparative analysis shows that in July the share of people trusting the public television increased by 3 points and the people trusting private televisions more than the public one increased twice as much (by 6 points). In July the share of those not trusting both the public television and private ones has shrunk slightly (from 13% in March to 11% in July).

If in March the ratio between the people trusting private televisions and those trusting the public BNT was 35% : 27%, in July it was 41% : 24% in favour of respondents trusting private televisions more than the BNT.

In July an above average level of trust in private televisions compared to the public BNT was registered among people aged between 18 and 50, as well as among highly educated respondents, inhabitants of the capital city and people living without deprivations.

Trust in the BNT was higher than that in private televisions among people over 60, among the poor and among people with primary education.

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

In March we witnessed among politically active people how supporters of the ruling parties tended to trust more the major private televisions — bTV and Nova TV — and supporters of the opposition fully trusted other private televisions. In July only 7% stated they trusted only other private televisions beyond the two major ones. *The data serves as circumstantial evidence that the altered political situation after 4 April is causing people to seek alternative sources of information less often — before the vote these were some of the cable and satellite televisions.*

Do Bulgarians trust the public radio (the Horizont and Hristo Botev programmes of the BNR) or private radio stations more during an election campaign?

The question was asked in both March and July.

Both in March and in July there were three times more people trusting the public radio (the BNR) during an election campaign, compared to the more trustworthy private radios. In July the respondents trusting the public radio more were 27%, and those trusting private radios more were 8%, whereas in March the ratio was 30% : 11%.

Public radio enjoyed the trust mostly of older people over 60, as well as of respondents with primary education, interviewees with a low standard of living and inhabitants of small towns in the country. Trust to private radios was declared most often by people aged between 40 and 49, those living without deprivations and inhabitants of the capital city.

In July the share of people who could not decide whether they trusted the public radio or private radios more increased by 3% (from 41% to 44%). In recent months respondents stating that they trusted neither the public radio nor private radios rose by 3% (from 18% to 21%).

Which private radios do Bulgarians trust more than the BNR?

The question was asked in both surveys.

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In July a total of 8% stated they trusted private radios more than the BNR. Darik Radio maintained its position from March as the private radio with the most trust outside the BNR.

Do Bulgarians trust traditional media (radio and television) or entirely internet-based media (websites, portals) more?

The question was asked in both March and July.

Preferences were in favour of traditional media. From March to July the share of people trusting traditional media more increased by 3% (from 72% in March to 75% in July); the share of interviewees trusting entirely internet-based media (websites, portals) decreased by 3% as well (from 28% to 25%). Trust toward traditional media was higher in all socio-demographic groups. The exception was young people under 30 — 56% of them trust entirely internet-based media more than traditional media. Older people over 60 almost exclusively trust traditional media.

Do Bulgarians prefer to derive their information from websites or social networks?

The question was asked in both March and July.

32% of participants in both surveys prefer to get informed about the election situation from websites. These are usually people aged between 30 and 39, interviewees with higher education, people living without deprivations. 22% in March and 19% in July preferred to get their information from social networks, and these were predominantly young people aged between 18 and 40.

In July the share of Bulgarians who had no preference as to the source of their information or could not differentiate between the online-based sources — websites or social networks — increased by 3% (from 46% to 49%). These were mostly older people over 60, inhabitants of villages, people with primary education or ones with a low standard of living.

How important is the quality of information for the trust in a given media in an election situation?

The question was asked in both March and July.

In both studies Exacta tested public assessments on the importance of the quality of information,

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including: objectivity, comprehensiveness, reliability and timeliness. We have not registered any dynamics of the data between March and July — the tested aspects of quality have been defined as important for trust in media by more than three quarters of interviewees in each study. The lower shares of importance attributed to the aspects ‘timeliness’ and ‘comprehensiveness’ are probably due to the specific meaning of these notions. This is confirmed by the data on the educational profile of respondents participating in the study.

What elements of election campaigns are Bulgarians following via traditional media (radio and television)?

The question was asked in both March and July.

The dynamics of the public interest into the elements covered by traditional media in the two election campaigns comes down to the following:

1. In July there was a certain decrease in the public interest in election debates (from 71% to 66%);
2. In July there was a certain increase in the interest in major events and initiatives of parties during the campaign, such as election chronicles after the news of electronic media (from 57% to 61%);
3. In July we registered a growing interest in the explanations given by the Central Electoral Commission (CEC) regarding the voting rules and procedures — from 60% to 64% (probably related to machine voting);
4. In July we have measured a certain increase in the interest in the surveys of sociological agencies regarding electoral attitudes (from 60% to 64%);
5. In July there was a slight increase (from 60% to 63%) of public interest in scandals and mudslinging scenarios related to parties and MP candidates;
6. In both March and July the interest in political advertisements (TV clips and radio spots) remained relatively low, at a ratio of 41% : 40%;

The socio-demographic interpretation of the data shows that debates on traditional media (radio and television) in July were mostly followed by people over 60, by interviewees with higher education and by inhabitants of the capital city. The clarifications by the CEC were of interest

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mostly to older people and ones with lower educational levels. The surveys of sociological agencies were of interest mostly to politically active respondents. The audience for scandals and mudslinging events attracted primarily middle-aged people, inhabitants of the capital city and politically active respondents. Interest to events organised by parties during the campaign was shown by respondents aged over 50 and inhabitants of small towns. Political advertisements (TV clips and radio spots) are unpopular among young Bulgarians, among representatives of minorities and among politically apathetic people.

What is the opinion of Bulgarians — should the media announce interim data from exit polls by sociological agencies before the official end of the election day or not?

The question was asked only in July.

51% of interviewees in July stated that the media should announce interim results from exit polls before the official end of the election day. 25% were of the opposite opinion. The position in favour of announcing the results is common among representatives of all socio-demographic groups. People with primary education and adults over 60 tend to be against the announcement practice.

Are Bulgarians interested in information in the media regarding interim results from exit polls by sociological agencies before the official end of the election day?

The question was asked only in July.

56% are interested in such information in the media. Usually such an interest is shown by people aged between 30 and 50, respondents with higher education and inhabitants of regional cities.

In which media Bulgarians seek information about interim results from exit polls by sociological agencies before the official end of the election day?

The question was asked only in July.

People seeking information from the media regarding interim results from exit polls by sociological agencies before the official end of the election day often use more than one media for the purpose. Usually they follow the media commissioning exit poll surveys — the major

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televisions, Nova TV, bTV and the BNT, as well as the BNR. 8% seek interim results in both social networks and individual websites and are obviously aware which online media acquire interim data during the election day.

SUMMARY OF THE COMPARATIVE ANALYSIS

1. The March and July surveys show that the preferences for the mainstream media and trust toward them during elections are variables that are determined by lasting attitudes among the main socio-demographic groups of the country's population;
2. In both surveys televisions are cited as the leading source of information in the course of the election campaign. We have registered a clearly expressed generational specifics of preferences — the share of people using television as a source of information is decreasing in the lower age groups of respondents.
3. The most common answer given by interviewees is that they derive their information about the election campaign from three or more media simultaneously. The use of different sources of information is a function of people's education and experience. Respondents' age, education and standard of living are significant factors in determining their media preferences during an election period.
4. Traditional media are preferred over online media by all socio-demographic groups with the exception of the youngest participants, under the age of 30, who prefer information from internet-based media.
5. 88% of interviewees in July stated specific television channels that they usually follow during the election day. The three broadcast televisions — bTV, Nova TV and BNT — are the most preferred media (a total of 84.5% of respondents prefer one of them).
6. In July 69% stated that they were not listening to radio on the election day, and 19% stated that they preferred to listen to the programme of the BNR on the election day. Radio is predominantly chosen as a source of information by older people, ones of lower educational levels, poor people.
7. In July the share of respondents trusting the public television (the BNT) more than private

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televisions increased by 3 points. At the same time, the share of people trusting private televisions more than the BNT increased by 6 points compared to March.

8. In both March and July the number of interviewees trusting the public radio (the BNR) more during the election period was three times greater than those trusting private radios more.
9. Traditional media command greater trust than internet-based ones. For the period March—July we have registered a 3% increase of respondents that trust traditional media more than internet-based ones (from 72% to 75%). For this period the share of people trusting entirely internet-based media more than traditional media has decreased by 3% (from 28% to 25%). The exception is young people under 30 who trust internet-based media more than traditional media, at a ratio of 56% : 44%.
10. In each of the surveys 32% of interviewees preferred to be informed about the election situation from websites. For the last months there has been a slight decrease of the share of people who prefer to derive their information from social networks (Facebook, Twitter, Instagram, etc.) before elections — from 22% in March to 19% in July.

In July the number of respondents with no preferences to the sources of online information or not distinguishing between them has increased by 3% (from 46% to 49%).
11. In both surveys requirements to information quality presented in the media — reliability, objectivity, timeliness and comprehensiveness — were comparable and stable.
12. In July we registered an increase in the interest to the components of the election campaign — debates and political events, as well as CEC clarifications on voting and data presented by sociological agencies. The lowest level of interest was shown toward political advertisements.
13. In July we registered that 56% of Bulgarians had an interest in, as well as some formed habits with regard to, seeking information on interim results from exit polls before the end of the election day. Most of them know which media commission exit polls and follow exactly those.
14. The July data shows that people wishing to have access to information on interim results during the election day is twice as big as that of people believing that such information should not be announced at all (51% : 25%).