

EXACTA RESEARCH GROUP



**MEDIA PREFERRED BY THE AUDIENCE AS INFORMATION SOURCES
REGARDING THE PRESIDENTIAL AND PARLIAMENTARY
ELECTIONS**

RESULTS OF A REPRESENTATIVE NATIONAL SURVEY

USING THE SEMI-STANDARDISED INTERVIEW METHOD

A TOTAL OF 1 005 INTERVIEWS WERE CONDUCTED AMONG THE ADULT POPULATION OF THE COUNTRY

November 2021

COMMENTS ON THE DATA

Passport of the Survey:

This was a representative national survey, conducted during the period 6—9 November 2021. 1 005 adult citizens in 91 settlements in the country were selected and interviewed face-to-face based on a quota principle (by sex, age and settlement type). The maximum deviation in the 50 % relative shares was about 3 %.

COMPARATIVE ANALYSIS

In the last seven months we witnessed three parliamentary and one presidential election campaigns. This turned out to be a unique opportunity to sociologically measure 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 three national surveys, conducted during the last weeks of the three campaigns, allows us to comment on both longer lasting attitudes and more dynamic ones.

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

Table 1

Which of the media listed below do you rely on for information about the course of the election campaign?		March 2021	July 2021	November 2021
	television	73.7 %	75.3 %	71.0 %
	online — media websites and portals	35.2 %	38.0 %	34.8 %
	social networks (Facebook, Twitter, Instagram, etc.)	37.9 %	35.8 %	34.2 %
	radio	28.6 %	25.2 %	28.4 %
	printed newspapers	19.5 %	17.2 %	16.3 %
	messaging platforms (Viber, etc.)	5.5 %	6.5 %	4.7 %
	I have no interest in the election campaign (I am not looking for any information in the media)	21.8 %	18.8 %	22.9 %

Note: The sum of the percentages is greater than 100 because the question allows for more than one answer.

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

In November we observed a slight increase in the share of respondents who were completely disinterested in the election campaign and were not looking for any information about it in the media (from 19 % in July to 23 % in November). These were usually non-voting Bulgarians and young people aged between 18 and 29.

Televisions were the media that most Bulgarians were using to stay informed about the election campaign — 74 % in March, 75 % in July, and 71 % in November. There was no socio-demographic group among interviewees where televisions were not the preferred information source (with the exception of the youngest participants, 46 % of whom preferred to derive their information from social networks).

In addition, we registered a clearly expressed generational specifics of responses — the share of people using television as a source of information during the election campaigns decreased significantly in the lower age groups. Among people over 60, in November the ones using television as their main source of information were 81 %, whereas the share was considerably lower (43 %) for young people below 30.

In November the shares of people preferring to derive their information from the two types of online media — websites and social media — were practically equal (34.8 % and 34.2 %).

At the end of 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.

We can conclude that in all three national surveys the aggregate result of the two types of online sources was practically equal to that of televisions in terms of influence.

In November one third of interviewees stated they were using three and more than three sources of information to follow the election campaign. This share was lower compared to the one registered in March (39 %) and July (37 %).

In November three and more than three sources of information were used the most by people aged 40—49 (42 % of them), highly educated respondents (50 % of them) and inhabitants of the capital city (40 % of them). Among politically active respondents, in November three and more than three sources of information were used the most by supporters of GERB (50 % of them) and of ‘We Continue the Change’ (47 % of them).

In November there was a slight increase (compared to the last two campaigns) in the share of people simultaneously using two media sources for their information — 27 %. This was stated predominantly by people with primary education (37 % of them) and supporters of the BSP (35 % of them). In both March and July the share of people using two media for their information was 23 %.

18 % of participants in Exacta's November survey stated that they did not rely on only one media for their information. In July their share was 21 %, and in March it was 16 %. In November only one media was relied on as a source of information predominantly by people aged 60 and above, inhabitants of villages and people with primary education.

During the November campaign there were no significant changes in preferences to radio as an information channel. In November it was stated as a source of information by 28 % of interviewees. These were mostly older Bulgarians over 60 (35 % of them), people living in severe deprivation (34 % of them) and supporters of the BSP (44 % of them).

In November there was a slight decrease in the share of people indicating printed newspapers as a source of information (16 %), mostly by older people over 60 (24 % of them) and inhabitants of Sofia (28 % of them).

In November the share of people using messaging platforms for their information was relatively low and decreasing (5 %).

Table 2

		March 2021	July 2021	November 2021
Do you trust the Bulgarian National Television (BNT) or private televisions more during the election campaign?	I trust the Bulgarian National Television (BNT) more	27.4 %	24.0 %	27.4 %
	I trust private televisions more	35.3 %	40.7 %	30.3 %
	I cannot decide whether I trust the Bulgarian National Television or private televisions more	24.0 %	24.4 %	29.1 %
	I trust neither the Bulgarian National Television nor private televisions	13.4 %	10.9 %	13.1 %

Do Bulgarians trust the Bulgarian National Television (BNT) or private televisions more during an election campaign?

In November we registered the smallest difference (compared to the previous two campaigns) between the shares of people trusting private televisions more and those trusting the Bulgarian National Television more — just 3 %. In July this difference was nearly 17 %, and in March it was 8 %.

Furthermore, in November we registered 5 % more respondents that trusted neither the public television nor private televisions. Such lack of trust is rooted in people's growing disappointment with political life.

The secondary analysis of Exacta's data shows that among people stating they were staying informed about the course of the election campaign from the television the difference between trust in the BNT (29 %) and in private televisions (32 %) was once again 3 %.

Respondents preferring to derive their information about the campaign from online sources (websites and social networks) demonstrated twice as much trust in private televisions compared to the public BNT (34 % and 17 % respectively).

37 % of interviewees relying on the radio as their source of information during the election campaign trusted the BNT more, and 32 % trusted private televisions more.

In November, as well as 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, inhabitants of the capital city and people living without deprivations.

Trust in the BNT continues to be higher than that in private televisions among people over 60, poor Bulgarians, people with primary education and inhabitants of small towns.

Table 3

Do you trust the public radio (the Horizont and Hristo Botev programmes of the BNR) or private radio stations more during the election campaign?		March 2021	July 2021	November 2021
	I trust the public radio (the Horizont and Hristo Botev programmes of the BNR) more	30.2 %	27.1 %	24.1 %
	I trust private radios more	10.7 %	8.0 %	18.6 %
	I cannot decide whether I trust the public radio or private radios more	40.8 %	44.4 %	41.6 %
	I trust neither the public radio nor private radios	18.3 %	20.6 %	15.7 %
Total	100.0 %	100.0 %	100.0 %	

About 70 % of participants in all three surveys stated that they did not use the radio as a source of information during election campaigns, and that is why the shares of people struggling to decide whether they trust private radios or the public radio more are significant. In November the share of people who could not decide whether they trusted the public radio or private radios was 42 % (compared to 41 % in March and 44 % in July). The share of people stating they trusted neither the public radio nor private radios was 16 % in November, 21 % in July and 18 % in March.

In November we registered a decrease in the share of people trusting the public radio (the Horizont and Hristo Botev programmes of the BNR) more than private radios. In November the ratio was 24 % : 19 %.

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

Now the difference between the two groups was just 5 %, mostly due to the decrease in trust in the public radio (by 3 % in each survey) and even more so due to the substantial increase in the share of people trusting private radios (10 % and 8 % in March and July, and 19 % in November).¹

All three surveys established that the public radio was trusted mostly by respondents over 60, people with primary education, ones with a low standard of living and inhabitants of small towns in the country.

Trust in private radios was declared most often by people aged between 18 and 49, as well as by Bulgarians living without deprivations.

Table 4

Does the following apply to you: number of respondents — 776			
	Yes	No	Total
It matters to me whether the election content offered in the media (interviews, comments, analyses, debates, articles, etc.) is paid or free	27.8 %	72.2 %	100.0 %
I manage to figure out whether the election content offered in the media (interviews, comments, analyses, debates, articles, etc.) is paid or free	41.4 %	58.6 %	100.0 %

28 % of Bulgarians following the election campaign in the media are showing an interest in whether the election content offered as part of the campaign is paid or free. Nevertheless, the majority of interviewees (72 %) stated that it didn't matter to them what parts of the election content in the media (interviews, comments, analyses, debates, etc.) were paid or what parts of it were free.

Men, respondents over 40 and under 60, people with higher education and wealthy people, as well as inhabitants of cities in the country, were more likely to show an interest in whether the interviews, comments and debates in the media were paid or free.

Voters for GERB and ITN, as well as those who had not yet decided who they would be voting for at the time when the survey was conducted, showed the highest interest in the topic.

The preferred media as sources of information during the election campaigns correlated with the interest of Bulgarians in the topic whether the election content being offered was free or

¹ The survey does not include a question regarding the specific preferred private radios, therefore it is not possible to say whether there is an increase in the trust in any of them.

paid.

37 % of people relying on printed newspapers for their information were interested whether the election content offered to them during the campaign was paid or free. For 63 % this topic evoked no interest.

For 36 % of people preferring to follow the campaign via websites and media portals it was important to know whether the content offered was paid or free. For 64 % of people preferring to get their information from websites and portals it was not important whether the content offered to them during the campaign was paid or free.

36 % of people using messaging platforms as a source of information during the campaign stated that for them it was important to know whether the materials reaching them were paid or free. 64 % were not interested in such information.

34 % of people deriving their information about the election campaign from radios stated that for them it was important whether the media content offered during a campaign was paid or free, and for 66 % this was not important.

For 34 % of people seeking information about the campaign in social networks it was important whether the materials were paid or free, and for 67 % this was of no interest.

28 % of people preferring to find their information from televisions were interested in whether the election content being offered was paid or free. For 72 % of respondents choosing to derive their information from televisions this matter was not important.

*The data in **Table 4** shows that, unlike people showing an interest in whether election appearances in the media were paid or free, the majority of respondents stated they were able to figure out what parts of the election content offered in the media was paid and what parts were free. This was stated by 41 % of Bulgarians following the election campaign. Usually such confidence was demonstrated by men, people aged between 30 and 60, people with higher education and inhabitants of the capital city, as well as people who voted for ITN, GERB and PP.*

Nevertheless, the majority of people stated they were not able to figure out which media appearances during the campaign (interviews, analyses, comments, etc.) were paid, and which ones were free — 59 %. This response was given most frequently by women, young people below 40, poorly educated people and inhabitants of settlements outside the capital city, as well as representatives of ethnic minorities.

The secondary analysis of the data shows that the users of information coming via messaging platforms found it the easiest to figure out whether media products during a campaign were paid or free (55 % of the users of information from this kind of source during the course of the campaign found it easy to figure out without any issue whether media products were paid or not).

The holders of the second place in self-esteem and therefore of ability to figure out whether the election campaign materials were free or paid was demonstrated by people stating they were getting their information about the campaign from printed newspapers (52 % of them); the third place was held by those following the course of the campaign in the social networks (50 % of them).

Among those who found it difficult to figure out whether the election media products were paid or free were respondents preferring to get informed about the campaign from televisions — 58 % of them.

The smallest number of people who were not able to make up their mind regarding the paid and free media products were found among respondents using messaging platforms as a source of information about the election campaigns — 44 %.

In conclusion — the majority of people using messaging platforms or printed newspapers as their information sources about the campaign felt more aware than the rest whether the election content in the media was paid or free.

Table 5

Are you looking forward to:
number of respondents — 776

	Yes	No	Total
Are you looking forward to the holding of a face-to-face debate between the nominated candidates in the presidential elections in the country on 14 November?	64.1 %	35.9 %	100.0 %
Are you looking forward to the holding of a face-to-face debate between the leaders of the parties participating in the parliamentary elections in the country on 14 November?	60.1 %	39.9 %	100.0 %

As of 9 November 64 % of Bulgarians following the election campaign in the media stated they were looking forward to the holding of a face-to-face debate in the media between the nominated candidates in the presidential elections in the country on 14 November. 36 % showed no interest in such a face-to-face presidential debate.

The highest interest in a debate among the nominated candidates in the presidential elections was registered among men, people aged over 40, and people with higher education.

In all social groups and classes people expressing an interest in such a debate were more than the ones who had no interest, with the exception of the youngest respondents, aged below 30.

The highest interest in a debate between the presidential candidates was demonstrated among voters for GERB and the BSP — more than 70 % of voters for both parties. More than two thirds of voters for both DB and PP were also highly interested in a presidential debate in the media.

Compared to the interest in a presidential debate in the media, the data from **Table 5** shows a slightly lower declared interest (by 60 % of interviewees) in the holding of a face-to-face debate between the leaders of the parties participating in the 14 November parliamentary elections. The share of people not interested in this kind of a debate between the leaders of the parties vying for the parliamentary vote was also higher — 40 %.

A debate between the leaders of the parties running in the parliamentary elections piqued the interest mostly of men, people aged over 40, people with higher education, and voters for the DPS, GERB and the BSP. The hardcore electorates of these traditional parties have the political reflex to expect such a debate and attribute great importance to it.

The highest interest in the holding of a face-to-face debate between the nominated presidential

candidates was demonstrated by people deriving their information about the campaign from printed newspapers (stated by 85 % of them), as well as those getting their information from radio programmes (74 % of them).

The highest interest in the holding of a face-to-face debate between the leaders of the parties participating in the parliamentary vote in the country was shown by people following the campaign in printed newspapers (77 %) and interviewees following the campaign via radio programmes during the election period (72 %).

Table 6

How important are face-to-face debates in the media for your choice of who to vote for in the upcoming elections?				
number of respondents — 776				
	Very important	Somewhat important	Not important at all	Total
How important are face-to-face debates in the media for your choice of who to vote for in the upcoming presidential elections?	46.3 %	36.9 %	16.8 %	100.0 %
How important are face-to-face debates in the media for your choice of who to vote for in the upcoming parliamentary elections?	43.9 %	36.8 %	19.4 %	100.0 %

The data in **Table 6** shows that *face-to-face debates in the media (between both presidential candidates and between candidates for members of parliament), according to the statements of interviewees themselves, are an important factor that has an actual impact on their choice.*

Considering the fact that the results of this survey were obtained at the very end of the campaign for the two votes — on 9 November — it is logical to assume that, in the absence of a debate between the main presidential candidates and the very few debates between the leaders of the

parties running for the parliament, many people were disappointed and were ultimately deprived of the opportunity to make their choice in the most motivated manner — in both the presidential and the parliamentary elections.

In this campaign politicians remained heavily indebted to both the media and their electorate, preferring to conduct their solo campaigns, with their dialogue running via informal channels and often employing atypical means such as insults, fake news, slander, etc. In this situation the media could not fully perform their function as a mediator and an informant of citizens, which was once again not their fault. The effort they made to compensate for such deficiencies were substantial.

Exacta's data from two electoral surveys, conducted in November, both in the midst of the campaign and at its very end, clearly showed that the lack of debates between the leading politicians and the manner in which their campaign was run at its decisive stage resulted in a marked increase in the number of people who didn't want to vote. At the very end of the campaign, as of 9 November, between 46 % and 47 % of Bulgarians stated they had shown an interest in the campaign and had followed it. The share of people intending to vote in the elections had decreased by more than 10 % as of 9 November, compared to the statements made as of 14 October.

The data in Table 6 also shows that the face-to-face debates in the media in the presidential elections seemed less important to the Bulgarians interviewed compared to the face-to-face debates in the media related to the upcoming parliamentary vote. (46.3 % : 43.9 %). In this case we are comparing only the positions of people viewing the debates in the media as something 'very important' and determining for their choice of who to vote for in both the presidential and the parliamentary elections.

Since the start of the campaign Exacta registered a higher interest among Bulgarians in the presidential vote compared to the parliamentary one. Assessments of the parliamentary elections were initially burdened with negativism, considering the unsuccessful attempts of the last two compositions of the parliament to form an effective cabinet.

If we try to summarise the answers to the question in two major categories, *the ratio between people who find the debates rather important and of high impact to their choice, especially for both votes, and people considering the debates to be of low importance and of little impact to their choice for*

both votes, it would be the following:

- **Face-to-face debates between the presidential candidates** seem rather important and impact 83 % of people following the campaign regarding their preferences for the presidential vote, and 16.8 % do not view the face-to-face debates between the presidential candidates in the media as a factor determining their choice on the day of the vote. The debates are not particularly important for young people below 40 and inhabitants of the capital city (who have obviously already made their independent choice to a greater extent than others, and it is final). Half of the people unwilling to vote describe the election debate between the presidential candidates in the media as insignificant for their decision on what to do regarding the vote.
- **Face-to-face debates between the party leaders competing in the parliamentary vote** seem rather important for 80.6 % and obviously these people consider the debates as a factor that could impact their choice on the day of the vote. GERB voters were more likely, compared to supporters of other parties, to state that to them debates in the media were very important in terms of their decision on who to vote for in the parliamentary elections. This shows that in addition to discipline and tenacity, the GERB electorate is also distinguished by their lasting interest in the performance of their leaders and that of other candidates in the media.

19.4 % of interviewees following the campaign did not consider the face-to-face debates to be important for the parliamentary vote and didn't believe that the debates could impact their choice on who to cast their vote for. These are people aged below 40 and inhabitants of larger cities. Fatigue and disappointment with the unsuccessful parliamentary choices since the start of the year have a more and more noticeable impact on the interest of young Bulgarians.

91 % of people considering the face-to-face debates in the media to be very important for their choice of whom to vote for in the presidential elections are looking forward to the holding of a face-to-face debate between the nominated presidential candidates. Only 20 % of people considering the face-to-face debates in the media to be completely unimportant for their choice of whom to vote for in the presidential elections are looking forward to the holding of a face-to-face debate between the nominated candidates.

Table 7

What prevails in your attitudes	Interest and curiosity	50.3 %
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when following the campaign for the upcoming elections in the media?	Boredom and fatigue (we are holding the third consecutive elections since the start of the year)	49.7 %
Total	number of respondents	775
		100.0 %

The data from this survey is showing the presence of two types of attitudes — completely commensurate as shares and radically different in nature. These two types of attitudes are related to people following the election campaign in the media.

50.3 % stated they followed the campaign in the media with interest and curiosity, and 49.7 % declared they were bored and fatigued with regard to following this election campaign in the media, because it was the third consecutive election campaign in the country since the start of the year.

The secondary socio-demographic reading of the data shows that *the highest level of interest and curiosity to the campaign in the media was registered among:*

- men
- people over 50
- Bulgarians living without deprivations
- inhabitants of the capital city and of small towns in the country
- ethnic Bulgarians
- GERB, VMRO, BSP and PP voters

Boredom and fatigue prevail in the attitudes of certain groups of people with regard to following the campaign in the media: Primarily such attitudes are shared by:

- women
- 60 % of young people under 30
- Bulgarians with lower than secondary education
- inhabitants of regional cities
- the Turks and the Roma
- DPS, ITN and IBGNI voters, but also people who have not decided who they would be voting for in the upcoming elections, as well as by those who don't even want to go to the ballot boxes on 14 November.

69 % of people following the campaign via printed newspapers stated that they felt ‘interest and curiosity’ to this campaign, and 31 % of those following the printed press were inclined to describe their attitude to the campaign as ‘fatigue and boredom’.

Interest and curiosity represented a higher share of the people following the campaign in all media, with the exception of those following the campaign in websites and media portals, as well as those following the campaign via messaging platforms. In the last two media there is a parity between the people experiencing interest and curiosity and those stating they felt fatigue and boredom regarding the campaign because of the last few elections since the start of the year.

ONE DIMENSIONAL DISTRIBUTIONS OF THE DATA

1. Which of the media listed below do you rely on for information about the course of the current election campaign for the 14 November presidential and parliamentary elections in the country? <i>(More than one answer)</i>	television	71.0 %
	online — media websites and portals	34.8 %
	social networks (Facebook, Twitter, Instagram, etc.)	34.2 %
	radio	28.4 %
	I have no interest in the election campaign (I am not looking for any information in the media)	22.9 %
	printed newspapers	16.3 %
	messaging platforms (Viber, etc.)	4.7 %
Total	number of respondents	1 005
		100.0 %

2. Do you trust the Bulgarian National Television\ BNT\ or private televisions more during the election campaign for the 14 November presidential and parliamentary elections in the country?	I trust the Bulgarian National Television (BNT) more	27.4 %
	I trust private televisions more	30.3 %
	I cannot decide whether I trust the Bulgarian National Television or private televisions more	29.1 %
	I trust neither the Bulgarian National Television nor private televisions	13.1 %
Total	number of respondents	776
		100.0 %

3. Do you trust the public radio (the BNR) or private radio stations more during the election campaign for the 14 November presidential and parliamentary elections in the country?	I trust the public radio (the BNR) more	24.1 %
	I trust private radios more	18.6 %
	I cannot decide whether I trust the public radio or private radios more	41.6 %
	I trust neither the public radio nor private radios	15.7 %
Total	number of respondents	776
		100.0 %

4. Does the following apply to you: number of respondents — 776			
	Yes	No	Total
4_1. It matters to me whether the election content offered in the media (interviews, comments, analyses, debates, articles, etc.) is paid or free	27.8 %	72.2 %	100.0 %
4_2. I manage to figure out whether the election content offered in the media (interviews, comments, analyses, debates, articles, etc.) is paid or free	41.4 %	58.6 %	100.0 %

5. Are you looking forward to:

number of respondents — 776

	Yes	No	Total
5a. Are you looking forward to the holding of a face-to-face debate between the nominated candidates in the presidential elections in the country on 14 November?	64.1 %	35.9 %	100.0 %
5b. Are you looking forward to the holding of a face-to-face debate between the leaders of the parties participating in the parliamentary elections in the country on 14 November?	60.1 %	39.9 %	100.0 %

6. How important are face-to-face debates in the media for your choice of who to vote for in the upcoming elections?

number of respondents — 776

	Very important	Somewhat important	Not important at all	Total
6a. How important are face-to-face debates in the media for your choice of who to vote for in the upcoming presidential elections?	46.3 %	36.9 %	16.8 %	100.0 %
6b. How important are face-to-face debates in the media for your choice of who to vote for in the upcoming parliamentary elections?	43.9 %	36.8 %	19.4 %	100.0 %

7. What prevails in your attitudes when following the campaign for the upcoming elections in the media?	Interest and curiosity	50.3 %
	Boredom and fatigue (we are holding the third consecutive elections since the start of the year)	49.7 %
Total	number of respondents	775
		100.0 %