REPORT ON THE NEEDS OF MEDIA SERVICE USERS IN SERBIA

PROTECTING FREEDOM OF EXPRESSION AND OF THE

MEDIA IN SERBIA - PROFREX

REPORT ON THE NEEDS OF MEDIA SERVICE USERS IN SERBIA

REF: 2026_1
26 February 2026

РЕГУЛАТОРНО ТЕЛО ЗА ЕЛЕКТРОНСКЕ МЕДИЈЕ

The research was conducted in cooperation with the Regulatory Authority for Electronic Media of the Republic of Serbia.

CONTENTS:

List of Charts:

1. Methodology

The research has been carried out by:	Centre for Free Elections and Democracy (CeSID) with the support of the Council of Europe Office in Belgrade
Fieldwork	Between 25 September and 18 October 2025
Type and size of the sample	Random, representative sample of 1,000 adult citizens of Serbia
Selection of respondents within the household	Selection of respondents using the method of the first birthday in relation to the day of the survey
Research technique	In-person interviews conducted in homes
Research Instrument	Questionnaire of 65 variables
The research was conducted at a time when the Regulatory Authority for Electronic Media (REM) is functioning without one of its bodies – the REM Council. For a year now, members of the Regulatory Authority for Electronic Media have not been elected.	

The public opinion survey, conducted by the Center for Free Elections and Democracy (CeSID), in cooperation with the Regulatory Authority for Electronic Media (REM) and with the support of the Council of Europe Office in Belgrade, was conducted in the period from September 25 to October 18, 2025, on a representative sample of 1,000 adult citizens of Serbia.

A questionnaire developed in collaboration with the client, consisting of 65 variables, was used as the research instrument.

Interviews with citizens were conducted using face-to-face research techniques within the household of the respondent, i.e. direct contact with the respondent. During the training of the interviewers, they emphasised the importance of adhering to respondent-selection rules, specifically the first-birthday method in order to avoid the possibility that only those citizens who open the door to the interviewer or answer the invitation within the household answer the questionnaire. Interviewers were required to survey the household members whose first birthday was in relation to the day of the visit, ensuring the inclusion of all demographic categories of the population of Serbia.

2. Description of the sample

Based on the methodology established during the implementation of this research, the following categories of respondents were included:

Gender structure of respondents: 48% men and 52% women.

Age of respondents: 18 to 29 years 19%; 30 to 39 years 17%; 40 to 49 years 18%, 50 to 59 years 17%, 60 to 69 years 15, over 70 years 14%.

The average age of the respondents is 48 years (18 – 90)

Educational structure of the respondents: primary school and lower 13% of respondents, school for workers' professions 20%, four-year secondary school 40% of respondents, college/university 25% of respondents, master's degree/doctorate 2% of respondents.

Region in which the respondent lives: Vojvodina 25%, Belgrade 25%, Western Serbia and Šumadija 27%, Southern and Eastern Serbia 23%.

Place of residence: urban settlement 58%; rural settlement 42%

Employment status: employed in public administration 14%, employed by private company 39%, unemployed, job seeking 15%, student 8%, pensioners 24%

Nationality: Serbian 89%, Roma 2%, Hungarian 2%, Bosniak 2%; other 4%; does not want to answer 1%.

3. Summary of the findings of the quantitative and qualitative research

The findings of quantitative and qualitative research point to the **accelerated digitalisation of the media environment in Serbia, but also to deep-rooted generational and educational differences in patterns of information consumption**. The Internet is the most widely used medium at both the household and individual levels, while cable television retains a strong reach, especially among older and less educated citizens. Young people predominantly use digital channels — social networks, portals and streaming services — while older and more conservative consumers remain tied to television, especially to television stations with national coverage, which nevertheless show a significant decline as the main source of information for the public in Serbia.

These differences are further confirmed and explained in focus groups through three patterns of media behaviour: **instant information-seeking of younger people through social networks, combined and reflective information of older people, and pragmatic and service-oriented media monitoring among members of national minorities**.

Trust in the media is **low to moderate**, as evidenced by both quantitative and qualitative findings. Television stations with national coverage have both the highest levels of trust and the highest levels of distrust, indicating polarisation of audiences. Focus group participants often describe television news programs as biased, politically controlled, or tabloidised.

On the other hand, social networks are perceived as a space in which a **larger number of voices are present, but with a high risk of misinformation and manipulation**. This coincides with quantitative findings of a high percentage of neutral responses regarding trust in digital channels, suggesting **undeveloped criteria for evaluating news sources and insufficient media literacy**.

Citizens explain their choice of media by the relevance, availability and personalisation of content, which is also confirmed by quantitative research — personalisation is crucial for 45% of respondents when choosing media.

Focus groups additionally show that younger respondents value **the speed, visuality, and directness of information**, while older respondents emphasise the **reliability and reputation of sources**. Members of national minorities particularly emphasise the importance of socially useful and linguistically accessible content, as well as local information available on portals or media in minority languages.

When it comes to content, citizens are most interested in **film and serial programs, followed by music, entertainment, information, sports and documentary programs**. Focus groups indicate that the quality of media content is most often associated with **accuracy, objectivity, and polyphony**. Older respondents point to cultural and documentary content as an example of quality, while younger respondents prefer digital and verifiable sources.

However, participants in all focus groups state that quality content is scarce, while **most of the media offer is described as politicised, tabloidised and insufficiently analytical**.

Both segments of the research indicate that harmful media content – propaganda, disinformation and spin – are highly present in domestic media.

Quantitatively, television is most often cited as the dominant source of such content (67%), while focus groups explain this **by the great reach and influence of television, but also by the perception of political dependence of the leading media**.

Social media is seen as a source **of the uncontrolled spread of misinformation and hate speech**, confirming the concerns of younger participants about aggressive commentary, the algorithmic spread of polarising content and the lack of oversight. The focus of national minorities is additionally emphasised by the sensationalist treatment of social topics and the lack of institutional reactions.

When it comes to trust, most citizens rely on the personal judgment and reputation of individual journalists or newsrooms, rather than trust in the media system as a whole. Older participants emphasise the alignment of content with their own beliefs, while younger participants prioritise timeliness and verifiability. **Checking information usually comes down to comparing several sources, while systematic checking is rare**.

Overall, the combined analysis confirms that **Serbia's media landscape is in a period of intense transformation**: digital channels are taking on an increasingly important role, traditional media are losing trust, and audiences are fragmenting. Citizens clearly express the need for professional, objective, analytical and diverse content, as well as for greater media literacy and more accountable media institutions. At the same time, high levels of scepticism and perceptions of the presence of harmful content point to structural problems in the media system, including political pressures, inefficiency of regulatory bodies and financial instability of the media.

4. Access to and consumption of media

The results of the research show clear differences in the degree of use of various media and communication services among households – Graph 4.1. The most common are **internet services** (fiber, cable, ADSL/VDSL, mobile 4G/5G, wireless), which are used by as many as **83% of households**, which confirms the high level of digital connectivity of citizens and indicates that access to the Internet has become a basic communal need. Only 14% of respondents say they do not use this service, while a small percentage (3%) are undecided or unwilling to respond.

In second place is **cable TV**, which is used by **68% of households**. This finding indicates that cable operators have a strong market position, and that citizens prefer stable access to domestic and foreign content, while terrestrial television, once dominant, has significantly lost its importance. Only **30% of respondents use it**, while as many as **65%** state that they do not use this service. Such a relationship indicates a shift from traditional to digital and cable signals, as well as a change in media habits.

Chart 4.1. *Do you use the following media and communication services in your household? (in %)*

Legend:
- We use this service
- We do not use this service
- Does not know / does not want to answer
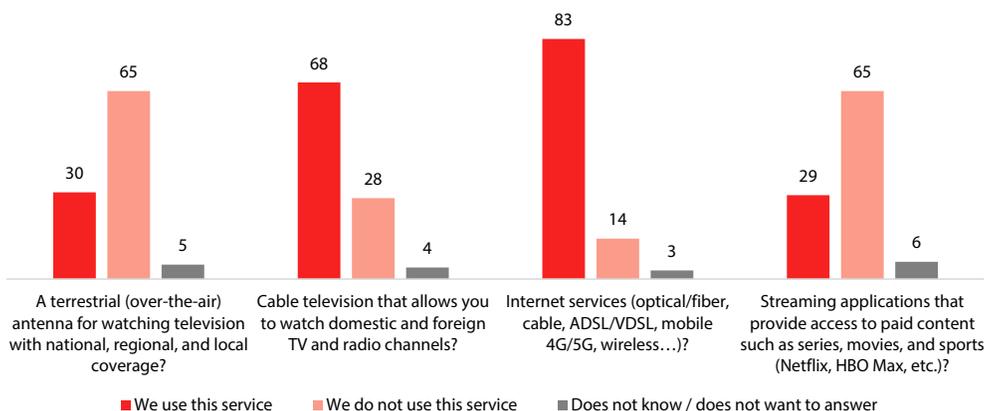
In terms **of streaming services** (Netflix, HBO Max, etc.), only **29% of households** use these platforms, while **65%** do not. This data suggests that paid digital platforms are still in the domain of more urban, digitally literate and materially better off strata of the population. Given the growth of internet access, it can be expected that the use of streaming services will gradually expand, especially among the younger population.

Overall, the data confirms the **high level of digital integration of** citizens when it comes to internet and cable TV, but also clearly points to a **digital divide** in the use of more advanced services such as streaming, which is a challenge and an opportunity for the development of digital skills and media literacy.

Figure 4.2. *Which of the following media and communication services do you personally use most often? (in %)*

- Does not know / cannot assess
- A terrestrial (over-the-air) antenna for watching television with national, regional, and local coverage
- Cable television that allows you to watch domestic and foreign TV and radio channels
- Internet services (optical/fiber, cable, ADSL/VDSL, mobile 4G/5G, wireless…)
- Streaming applications that provide access to paid content such as series, movies, and sports (Netflix, HBO Max, Amazon Prime Video…)

When looking at the *personal use* of certain media and communication services, Internet services are clearly singled out as the dominant choice of citizens – Graph 4.2.

As many as **38% of respondents** state that they use the Internet most often, which confirms the trend of complete digitalisation of everyday activities – from information and communication to entertainment and access to administrative and commercial services. This finding is fully in line with the previous graph, where it was noted that more than 80% of households have internet access.

Cable TV ranks second with **35%** of respondents citing it as the primary channel of communication and information. This data indicates that traditional formats still have a stable audience, especially in older and more conservative segments of the population, while a gradual transition to digital services is taking place in parallel.

Terrestrial television has a much smaller share – **18% of respondents** state that they use it most often. This confirms the declining importance of traditional broadcasting and the shift of citizens to cable and internet platforms.

The use **of streaming services** (Netflix, HBO Max, etc.) is still modest: only **5% of respondents** cite these platforms as the primary medium they use on a daily

basis, while **4%** could not declare. This indicates that services of this kind are still limited to a narrower group of users — mostly younger, digitally active and financially more stable citizens.

Overall, the findings confirm **the steady dominance of the internet and cable TV** as the main sources of information and communication, with the simultaneous decline of traditional media formats and the slow, but visible, growth of digital platforms.

If we analyse the demographic differences in the use of media and communication services, it is noticeable that **streaming services are** used above average by young, urban strata of the population, those who have a university degree and those who live in the Belgrade region.

A similar profile of respondents uses Internet services to the greatest extent. The Internet is the dominant means of communication and provision of media content for citizens between 18 and 49 years of age (mostly among the youngest who are between 18 and 29 years old), followed by those who have a four-year high school and university degree, residents of urban settlements in the regions of Belgrade and Vojvodina.

Cable television is mostly used among the services offered in Vojvodina, by respondents with secondary education (II, III and IV degree), those who are between 50 and 70 years old, live in urban settlements, employed in public administration.

"Terrestrial" television, through old antenna systems, is something that is primarily used by the elder citizens (those who are over 60 years old, live in rural households, have a lower level of education and mostly come from the region of Western Serbia with Šumadija, as well as Southern and Eastern Serbia.

An analysis of the time that citizens spend daily with certain media shows that **television still occupies a central place in media consumption** – Chart 4.3.

Figure 4.3. *How much time in minutes in one day do you spend with...? (in minutes)*
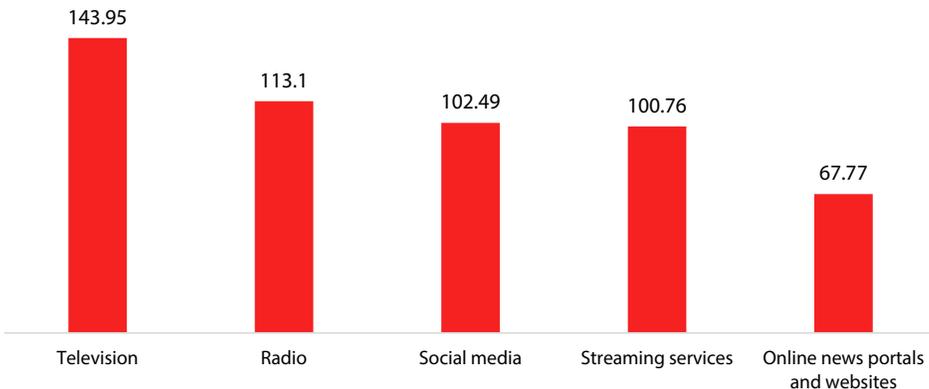
On average, respondents spend about **144 minutes a day watching television**, which is almost two and a half hours. This data confirms that, despite the development of digital channels, television still has a strong influence and retains the status of the dominant medium for information, entertainment and relaxation among the citizens of Serbia.

In second place is **radio**, with an average **of 113 minutes per day**, which is above expectations given the perception of its decline. It is obvious that radio retains an important role, especially through background or parallel listening to other media, among senior citizens, drivers and working people.

Social networks and **streaming services** record almost identical levels of usage — **about 100 minutes per day** (102.5 and 100.8 minutes, respectively). This data points to the strong presence of digital platforms in the everyday lives of citizens, but also to the fact that new media habits have already stabilised and complement traditional formats, instead of completely replacing them.

Citizens spend the least amount of time on **news websites and websites** — an average **of 68 minutes a day**. This suggests that direct monitoring of news content via the Internet is limited, probably because information is increasingly taking place indirectly, through social networks and news aggregators.

Overall, the structure of time consumption shows the **coexistence of traditional and new media**, with television remaining dominant, while digital media — social networks and streaming platforms — increasingly shape the patterns of everyday communication, especially among younger and more urban parts of the population.

The results show that **TV stations with a national coverage license are** still by far the most widely used source of information and entertainment — cited by as many as **35% of respondents** — Figure 4.4. This data confirms that traditional television still has the greatest reach and credibility in the perception of citizens, especially when it comes to daily information and monitoring of current events. In the context of local communities, this result indicates a high dependence on centralised media streams and a limited impact of alternative sources of information.

In second place is **Instagram (16%),** which is the most represented digital channel and is a key platform for informing younger citizens. It is closely followed by **cable TV stations** (15%), indicating the coexistence of traditional and digital forms of media consumption. This finding confirms that digital channels have not supplanted traditional media but have complemented the overall communication ecosystem.

Figure 4.4. *What type of media do you use most often? (%)*

Media	%
TV stations with a national coverage license	35
Instagram	16
Cable TV channels (domestic or foreign)	15
Internet websites and news portals	8
TikTok	7
Facebook	7
YouTube	5
Radio stations	3
Regional or local TV stations	2
Twitter	1
Specialized news/information channels	1
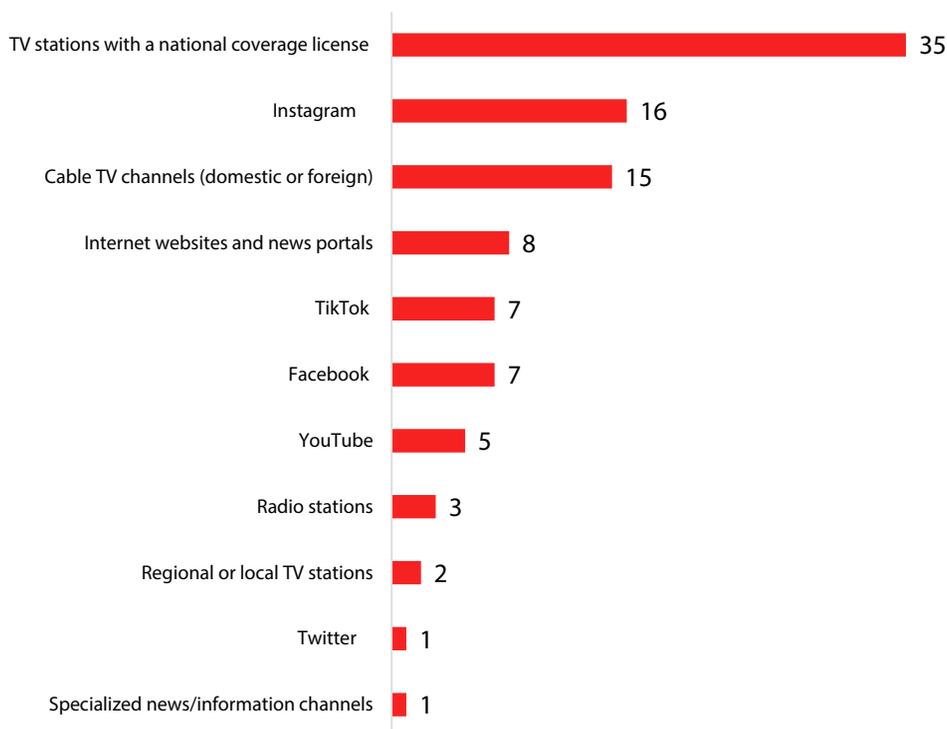
Internet portals (8%) and **video and social media platforms** such as **TikTok (7%), Facebook (7%)** and **YouTube (5%)** show intermediate levels of use. Their aggregate significance, however, is not negligible — almost a third of respondents use these sources for everyday information. Such a finding points to the growing fragmentation of the media space, where more and more users rely on short, visually appealing formats and mobile-friendly content.

On the other hand, **radio stations (3%), regional and local TV stations (2%),** as well as **specialised news channels and Twitter (1% each),** are marginally represented. This confirms the trend of losing the influence of local and thematic media, but also the change in the way citizens access information — short, selective and digitally mediated.

Women are more likely than men to use traditional television channels with national coverage, while men are more likely to prefer **cable TV stations** and **internet portals**. These results indicate that men show a higher degree of digital orientation in media habits, while women still retain a stronger connection to traditional television content.

On social media, the differences are particularly pronounced with **Instagram**, which is used by women more often than men. On the other hand, **YouTube** is somewhat more present among men, which is confirmed by the gender pattern

in the choice of platform and type of content — women prefer social and communicative networks, while men more often consume video formats and news portals.

Citizens of Western Serbia with Šumadija most often watch **TV stations that have a license for national coverage**, which is the highest percentage compared to all other regions. This finding suggests that traditional television still has a dominant position in this part of the country, possibly due to an older population and less developed digital infrastructure.

In Vojvodina and **Belgrade**, there is a higher share of **users of cable TV channels** and **internet portals**, which confirms that digital information formats are significantly more present in urban areas and more developed regions. In the same areas, a higher share of **users of social networks**, especially Instagram, was recorded, while **TikTok** and **YouTube are** especially popular among the younger population in Belgrade.

Southern and Eastern Serbia, although it records the lowest share of users of social networks and internet portals, shows a relatively high level of cable TV monitoring, which indicates a transitional model between traditional and digital habits.

Overall, these findings confirm a pronounced **regional digital divide** – traditional television dominates in the central and western parts of the country, while cable, internet and social news channels are more prevalent in Belgrade and Vojvodina.

The results of the research indicate a pronounced **educational digital divide**, where the structure of the media channels used changes with the increase in the level of education. Citizens with **a primary school or lower education are** by far mostly use **national television stations**, which confirms that traditional media remain the primary source of information in population groups with lower education. In this category, there is a very low level of use of digital platforms and social networks, i.e. limited digital literacy and habits are shown.

Respondents with **a high school diploma** reported a decrease in reliance on television, with an increase in the viewing **of cable TV channels** and **social networks**, primarily **Instagram** and **TikTok**. These data indicate that citizens with a high school diploma form an intermediate group between traditional and digital models of information.

People with **a higher education, university degree or master's/doctoral degrees** — watch television to a significantly lesser extent, while they are highly oriented towards **internet portals** and **social networks of a professional-informative type** (e.g. YouTube and Instagram). This pattern shows that higher levels of education correlate with greater digital literacy, more diverse sources of information, and a higher degree of selectivity in media choices.

The youngest population, aged **18–29**, predominantly uses **social networks** — primarily **Instagram** and **TikTok**, while watching television with national coverage is almost negligible in this group. This data clearly shows that among young citizens, up to 30 years of age, television does not play a central role, and the content for them is adapted to mobile platforms and short formats.

For **30–39 years, the group** has been balancing traditional and new sources of information, which reflects the maturity of digital habits while retaining a partial attachment to TV content.

In middle age, especially in the **population of 40–59 years**, television becomes dominant again while the use of social networks decreases, while in the oldest respondents (**60+ years**), television is almost the exclusive medium.

Such a pattern confirms the existence of an intergenerational digital divide.

Overall, the findings confirm that **Serbia's media landscape is radically changing along age lines** – younger populations have fully switched to digital communication channels, middle generations are in a transition phase, while older ones still rely on television as the main source of information.

5. Trust in the media

The results show that trust in the media is generally low, with a pronounced reservation towards all types of news channels.

The highest level of trust is recorded by television stations with national coverage (28%), but it is important to note that this media also enjoys the highest level of distrust, i.e. 39% of citizens do not consider them trustworthy, which suggests **polarisation of opinions among Serbian citizens**. We also have a high percentage of citizens who are neutral towards television with national coverage, i.e. **their position is neutral, neither having nor lacking trust – 29%.** Respondents who state above average that they trust television stations with national coverage come from Southern and Eastern Serbia, are over 60 years old, live in rural areas and/or are pensioners. On the other hand, Belgraders, under the age of 40, residents of urban areas, pupils and students above average state that they do not trust these media. Also, with the increase in education, the percentage of respondents who do not trust televisions with national coverage is also increasing.

Regional and local television (20%), as well as cable channels (19%), have similar levels of trust, while specialised news media (14%) and print media (12%) have even lower levels of trust. At the same time, the level of distrust of citizens in these media far exceeds the levels of trust: in the case of regional and local televisions, 34% of respondents do not trust, in specialised news channels this attitude has 28% of respondents, one third of citizens do not trust print media (32%), while for cable TV stations (N1, Nova S, K1, Kurir, Blic...) 30% of citizens say that they do not trust. 37% are neutral.

Demographically speaking, respondents who state above average that they trust local and regional televisions have slightly lower levels of education, come from rural areas, from Southern and Eastern Serbia and are over 60 years old. Cable channels are trusted above average by respondents aged 40 to 49, the unemployed, as well as highly educated respondents. Trust in print media is highest in Eastern and Southern Serbia, among those over 60 years of age, respondents from rural areas and pensioners.

Finally, with radio stations, we have a situation in which the degree of trust exceeds the degree of distrust. Radio stations are trusted by 28% of respondents, while on the other hand, 20% of citizens do not trust them, with 34% of respondents who have a neutral attitude. Trust in radio stations is above average among respondents living outside Belgrade.

When it comes to digital channels, online portals (16%) and social networks have almost identical, but low trust scores — from 26% for YouTube to 13% for Twitter.

Figure 5.1. *Would you say about yourself that you have trust in…? (%)*

	Lacks trust	Neither trusts nor distrusts	Has trust	Doesn't know, can't assess
Social Network: TikTok	25	29	19	27
Social Network: Twitter	25	29	13	33
Social Network: Instagram	22	34	23	21
Social Network: Facebook	19	39	22	20
Social Network: YouTube	18	39	26	17
Websites/Portals: B92, Mondo, Kurir, Blic, Telegraf, Radar, Nova S…	26	40	16	18
Radio Stations: Radio S, Play radio, local radio stations…	20	34	28	18
Print Media (Newspapers): Daily and weekly newspapers you buy at newsstands	32	33	12	23
Specialized News Channels: Vesti, Tanjug, Euronews…	28	37	14	21
Cable TV Stations: N1, Nova S, K1, Kurir, Blic…	30	37	19	14
Regional/Local TV Stations: TV Mag, TV5 Užice, TV Vranje…	34	29	20	17
National TV Stations: RTS, PINK, Prva, Hepi, TVB92	39	29	28	4

In the case of websites and portals (B92, Mondo, Kurir, Blic, Telegraf, Radar, Nova S…) the trust of citizens is low and amounts to 16%, and we have ten percentage points more respondents who state that they do not trust internet portals. Respondents aged 30 to 39 and employees in public administration have above-average trust in internet portals and websites.

YouTube is trusted by 26% of respondents in our survey, while 18% of those who do not trust it. Above average, respondents who come from Western Serbia with Šumadija, the youngest respondents (42% of respondents under the age of 30 say they trust YouTube), as well as the unemployed and students, have more than

average. The degree of trust and distrust in the case of Facebook and Instagram are approximate (so 22% of respondents do not trust Instagram, while 23% indicate trust in this network, and in the case of Facebook, we have 19% of respondents who do not trust and 22% of those who do). Facebook is trusted above average by respondents from Vojvodina and Western Serbia with Šumadija, under the age of 30, respondents from rural areas and the unemployed. It is similar with Instagram, trust is above average among respondents from Western Serbia and Šumadija, among those under 40 years of age, the unemployed, pupils and students, but also women. One in four respondents do not trust Twitter, compared to 13% of those who trust Twitter. Trust in Twitter is highest among those under the age of 30 and declines with the age of respondents. TikTok is trusted by 19% of respondents, while 25% do not trust it. Respondents under the age of 30 and pupils and students have an above-average trust in TikTok. What is important to note in the case of digital information channels is the high percentage of respondents in each of the categories who state that they are neutral in terms of trust according to the surveyed source of information (the answer is neither there nor there is trust) – in the case of internet portals and websites, this percentage is as high as 40%. The high level of neutrality of citizens on this issue suggests **a cautious approach to digital channels of information**. People are not ready to fully believe, but they are not ready to reject these sources of information.

Overall, the findings indicate that Serbian citizens show a high level of skepticism towards the media, without a clear source they fully trust. This is a crisis of trust in traditional and new media alike. Citizens' trust in the media is low and fragmented — no type of media enjoys dominant credibility, confirming a deep crisis of trust in the media system as a whole.

Figure 5.2 shows the preferences of Serbian citizens in terms of the use of different media platforms and sources of information. **Instagram (16%)** dominates as a favorite choice, indicating the growing role of visual content, digital media and social media in the way citizens access information.

This is followed by the national broadcaster **RTS (14%),** which continues to have a significant impact. A dozen respondents cited **Pink (10%),** as well as the N1 news channel **(10%). TikTok (8%)** and **Facebook (8%)** are also prominent, acknowledging the importance of social media as a source of news and information, but to a lesser extent compared to Instagram. **YouTube (5%)** and "TV stations" in general as a category (**5%**) have a significantly lower percentage of users compared to the first two. Most other television stations, such as Prva (**4%),** Happy and NovaS (**3% each**), have an even smaller share, and traditional media such as radio stations (**2%)** and newspapers (**2%),** have a very low percentage of respondents who singled them out as the specific media they follow most often.

Figure 5.2 *Please identify one particular media outlet (whether it's traditional, online or social...) that you follow most often? (%)*

Media outlet	%
Instagram	16
RTS	14
Pink	10
N1	10
TikTok	8
Facebook	8
YouTube	5
TV in general	5
Prva TV	4
TV Happy	3
NovaS	3
None	2
Radio stations	2
Blic	2
Other	1
X (twitter)	1
TV B92	1
Telegraf	1
Different internet portals	1
Netflix	1
Informer	1
Arena Sport	1
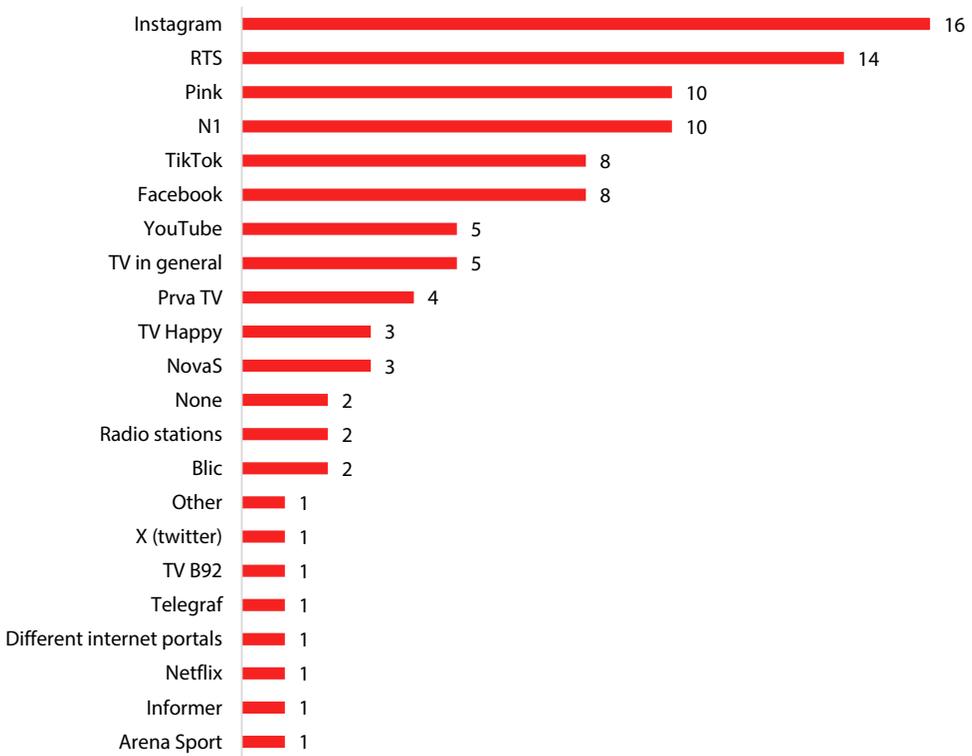
Interestingly, a small percentage of survey participants (**2%)** report that they do not use any of these sources, which may indicate computer isolation or reliance on completely different sources of information such as immediate environment, friends and family.

Overall, the data suggests that social media is slowly becoming an increasingly popular source of information, while traditional media is losing its relevance. Nevertheless, television with national coverage, as well as cable and specialty TV channels, continue to play an important role, especially for older respondents (over 60 years old) and respondents from rural areas.

Respondents were asked, on a scale of 1 to 5, to indicate how much they trust the media they listed as the one they use most often in the previous question. **The average rating that respondents give for their trust in the medium they follow is 3.8 out of 5 – where 62% of respondents give a score of 4 or 5 and state that they trust the medium they follow most often, 28% of respondents gave a grade of 3 and said that they neither have nor do not trust the said media, while 6% of respondents gave a rating of sufficient (2) or insufficient (1) and stated that they do not trust the media that they follow the most**.

Figure 5.3. *On a scale from 1 = I don't trust at all to 5 = I have a lot of trust, how much do you trust the media you have listed? (%)*
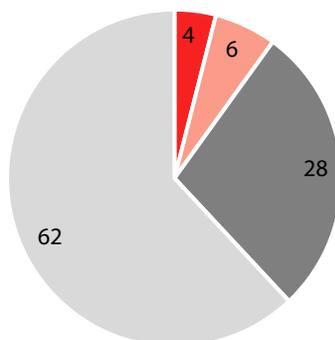
■ Doesn't know, can't assess   ■ Lacks trust   ■ Neither trusts nor distrusts   ■ Has trust

Despite the low overall trust in the media, the majority of citizens still have a relatively high level of trust in the media they most often follow (as shown by the high average rating). What is interesting to point out is that only half of the respondents who state that they most often use Instagram and 55% of respondents who stated RTS as their main way of informing give the highest marks (four or five) when it comes to trust in these media, while on the other hand, 81% of respondents who are most often informed through Informer, 73% of respondents who are most often informed through Pink and 68% of respondents who are most often informed through N1 give the highest marks in terms of trust in these media.

The data shown in Figure 5.4 show that the most important factors for the citizens of Serbia when choosing the media to follow are **personalisation and relevance** of content. Almost half of respondents (45%) choose a medium that provides them with the content that suits them and that they need. Then we have 36% of respondents who state that they choose content that is easily accessible. **Timeliness is important for 30%** of survey participants, which indicates the need for fast and up-to-date information. Alignment with personal beliefs is a relatively important factor for 28% of respondents, while reliability and accuracy come in fifth place (26%).

One in four respondents cite trust as a key reason for choosing media, while impartiality and objectivity are even less important, with only 22%. A relatively small percentage of respondents (9%) did not have an answer to this question.

It provides me with content that suits me and that I need	45
The content and information are easily accessible	36
It provides me with timely information	30
It is in line with my beliefs	28
It provides me with accurate information, it is reliable	26
I trust this media outlet	25
Impartial/objective in reporting	22
Doesn't know, no response / No answer	9

Respondents were asked what could be causing them to stop following the media they are currently following. **In the first place, the spread of disinformation was pointed as as a key factor that could lead people to stop following a media outlet (37%).** Slightly fewer respondents (35%) would stop following the media if a new medium that better suits their needs appears, which indicates the importance of relevance and personalisation of content. Changing the format of the content (33%) is also a significant factor, which may indicate a preference for a particular way of presenting information (e.g., video, text, podcast).

Loss of trust in the media is an important factor, but less crucial than the spread of disinformation and the emergence of better media (26%). Delays in information (23%) and a change in editorial policy (21%) also play a role, but to a lesser extent. Finally, we have 17% of respondents who did not have an answer to this question.

Chart 5.5. *What are the reasons that could influence you to stop following or change the media you follow most often?, up to three answers, (in %)*

Reason	%
Spread of disinformation (i.e., intentionally false or misleading information)	37
Emergence of a new media outlet that better suits my needs	35
Change in content format	33
Loss of trust in the media outlet	26
Delay in providing information / Information delays	23
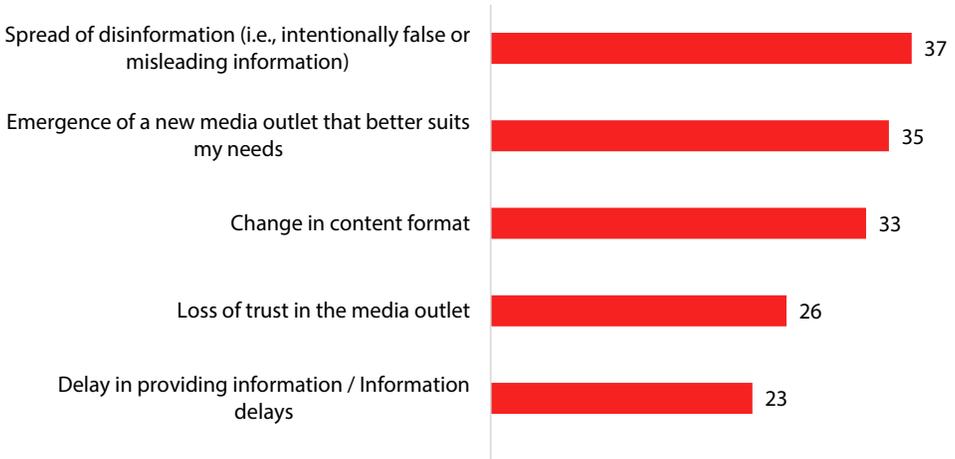
6. Interest in content and programmes

This chapter will present findings on which and what kind of media content citizens most often consume, what specific types of programmes they follow (informative, documentary, cultural-artistic, entertainment, film and serial programmess), as well as in which language the media they personally follow are mostly broadcasted. The chapter opens with answers to the last question in which language the media they follow the most are broadcast. The findings were expected: **83% of citizens said that they follow the media in Serbian language (sound and subtitle)**. This is followed by 8% of respondents who said that they follow media in English language and subtitles and 3% of respondents who follow media in one of the languages of national minorities in Serbia.

Figure 6.1. *What is the language in which the media that you personally follow the most? (%)*

In the Serbian language (audio and subtitles)	83
In the English language (audio and subtitles)	8
In the language of another national minority in Serbia (audio and subtitles)	3
In the language of the national minority to which I belong (audio and subtitles)	1
In another foreign language that is not a minority language in Serbia	1
Doesn`t know, no response / No answer	4
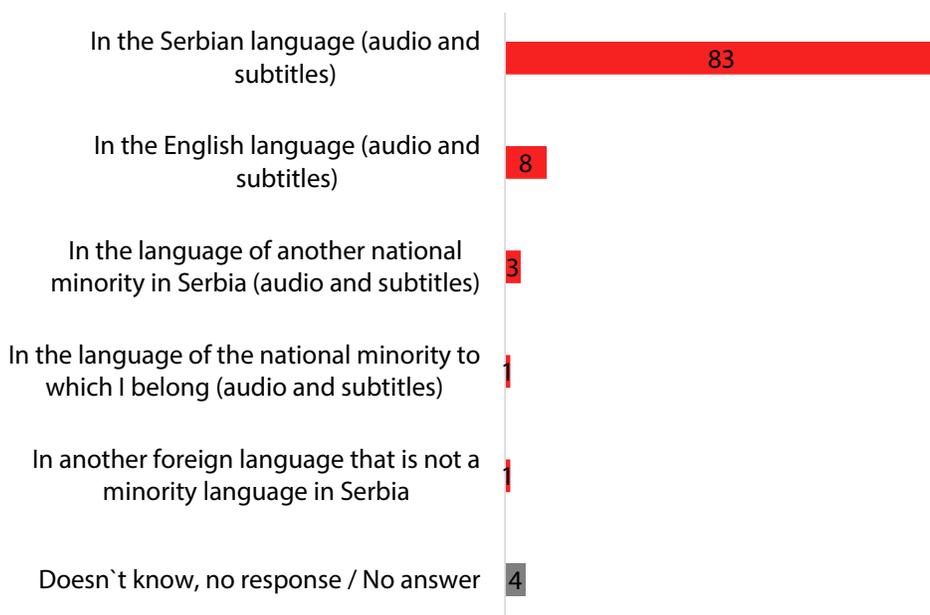
The respondents were then offered 12 different types of media content and were asked to say on a scale from 1 – Not at all, to 5 – Very much, how much they are interested in them. The data are presented through the average score (Figure 6.2) and through percentages (Figure 6.3).

The average rating shows (I don't know or can't judge the answers are excluded), **the first place is occupied by the film and series programme, with a score of 3.41**. In the first group of content that citizens are most interested in, there are also music programmes (3.25), entertainment programmes (3.18) and information programmes (2.98). In the second group there are sports programmes (2.72), documentary programmes (2.65), scientific and educational programmes and cultural and artistic programmes (2.57 each). Finally, in the third group there are religious programmes (2.31), games (2.23), reality programmes (2.15) and children's programmes (1.95).

Figure 6.2. To what extent are you interested in the following media topics/content…, average rating on a scale of 1 to 5
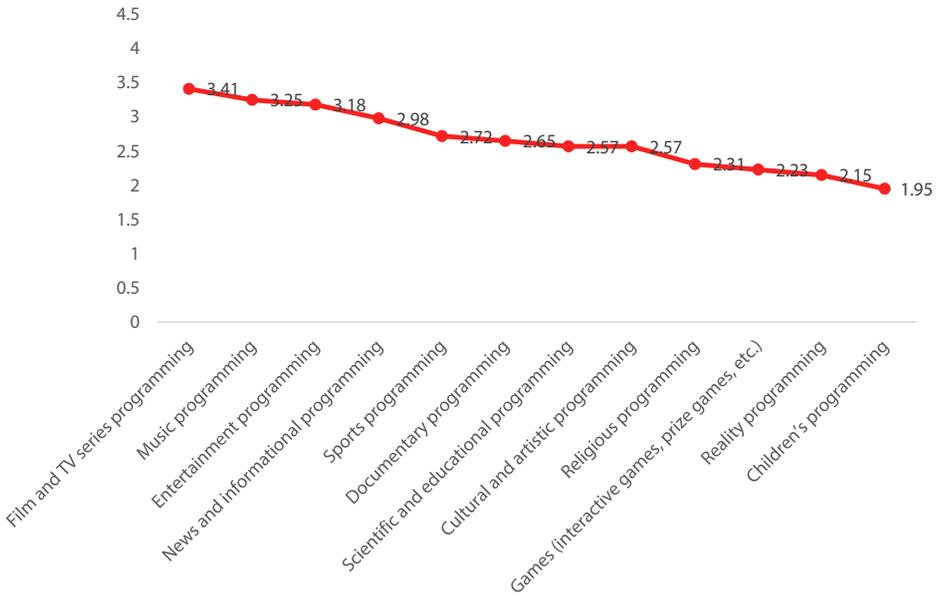
In terms of percentage, **46% of respondents are very interested in film and serial programmes, 39% are interested in music programmes, and 36% are interested in entertainment programmes**.

33% of citizens are very interested in the news programme, 29% are interested in sports programmes, while 21% of citizens are interested in the documentary programme.

On the other hand, **65% of citizens are little or not at all interested in children's programmes, 61% of citizens are not interested in reality content**

and 57% of citizens are not interested in games (prize games, interactive games…) tag. There is not much interest in religious programmes either, as 55% of citizens are little or no interested in this content.

Figure 6.3. *To what extent are you interested in the following topics/contents? (%)*

Programme	Not at all	A little	Moderately	Much	Very much	Doesn't know
News and informational programming	16	18	30	17	16	3
Documentary programming	22	21	33	11	10	3
Scientific and educational programming	24	21	34	9	9	3
Cultural and artistic programming	23	22	32	12	8	3
Entertainment programming	9	16	36	21	15	3
Reality programming	47	14	21	7	9	2
Children's programming	50	15	23	6	3	3
Religious programming	32	23	26	10	6	3
Film and TV series programming	8	9	34	28	18	3
Music programming	8	16	34	22	17	3
Sports programming	29	15	24	13	16	3
Games (interactive games, prize games, etc.)	39	18	25	9	6	3

- ■ Not at all
- ■ A little
- ■ Moderately
- ■ Much
- ■ Very much
- ■ Doesn't know, no response / No answe

The previous question shows that there is relatively high interest of the audience in news content and that they are very, very interested in following it, as sated by almost a third of respondents (33%). That is why an additional question was asked: what type of news programme they most often follow.

The largest percentage of citizens follow the news, 38%, while 19% of citizens follow informative and entertainment formats, such as "Šarenica" or "150 minutes". This is followed by informative-documentary content (9%), current news programmes (8%) and info programmes intended for specific target groups (6%).

Figure 6.4. *What type of news program do you follow most often? (%)*

Category	%
News	38
Info-entertainment programs (e.g., Šarenica, 150 minuta, Eksploziv)	19
Info-documentary programs (e.g., Razglednica, Povratak na selo)	9
Current affairs programs (e.g., Fokus, Aktuelnosti, OKO)	8
Informational programming intended for a specialized target group (e.g., programs for the diaspora, farmers)	6
Broadcasts of sessions of public authorities	2
Doesn`t know, no response / No answer	18

Regionally, news is watched equally everywhere, current news shows are watched above average in Western Serbia with Šumadija, and informative-documentary and specialised programs in Southern and Eastern Serbia. News is consumed above average among the most educated and least educated, as well as among the population over 60.

To follow the documentary programmes (*Figure 6.3.*), said a fifth of the surveyed population (21%). **When it comes to the types of documentary programmes they follow, travelogues (25%) are in the first place, followed by reportages (22%) and documentaries (16%).**

In Southern and Eastern Serbia, documentaries and reportages are watched above average, while in Western Serbia with Šumadija, travelogues are watched above average, but this is also the region where documentary formats are watched the least. Also, documentary programmes are not watched above average by the youngest population (18–29) and by citizens with or without primary school.

Chart 6.5. *What type of documentary programme do you follow most often? (%)*

- ■ I do not follow documentary programs
- ■ Travelogues
- ■ Reportages
- ■ Documentary films

A fifth of the population in Serbia says that they follow the cultural and artistic programme (*Figure 6.3).*). **They most often watch shows about movies (25%), followed by literature and theatre (11% each), television shows are watched by a tenth of the population, while shows about photography are watched by 4% of the surveyed citizens**. Almost two-fifths of citizens are not interested in watching cultural and artistic programmes at all. In Belgrade, shows about literature and theatre are watched above average, while in Southern and Eastern Serbia, shows about films are watched above average. Citizens with higher education above average watch programs about literature, theater and film, while citizens with lower education above average watch programs about television.

More than a third of the population in Serbia is interested in watching entertainment programs (36%) – *Figure 6.3.*

Chart 6.6 *When you follow the cultural and artistic program, which shows do you watch most often? (%)*

Show programs (Survivor, Zvezde Granda)	25
Quizzes	22
Humorous and satirical programs (Veče sa I. Ivanovićem, 24 minuta)	21
Talk shows	10
High-production-value skill and talent competitions (Ja volim Srbiju, Štoperica)	5
I do not follow entertainment programs	17
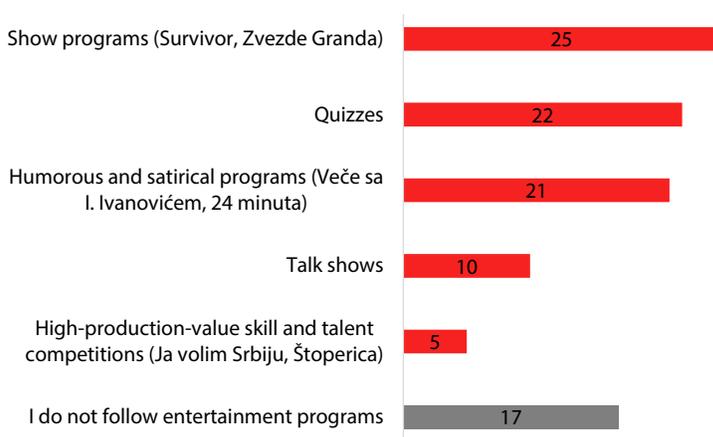
A quarter of citizens (which is the highest percentage) watch show programmes ("Zvezde Granda", "Tvoje lice zvuči poznato" and the like). This is followed by quizzes followed by 22% of citizens, comedy and satirical shows such as "24 minuta" or "Veče sa Ivanom Ivanovićem" followed by 21% of respondents, while at the end of the list are talk show programs (10%) and competitions in abilities and skills (5%), such as "Ja volim Srbiju" and similar formats.

More than a third of the population in Serbia is interested in watching entertainment programmes (36%) – *Figure 6.3*.

Quizzes are watched above average in Southern and Eastern Serbia, show programmes are watched above average by women and respondents aged 18–29, citizens from the second or third grade of high school and over 60 years of age, while comedy and satirical shows are watched above average by people aged 40–49.

Only 9% of the citizens are as stated (*Figure 6.3)*.), is interested in following children's programs, which can certainly be explained by the fact that the sample does not include cohorts under the age of 18.

Figure 6.7. *What type of entertainment programme do you follow most often? (%)*
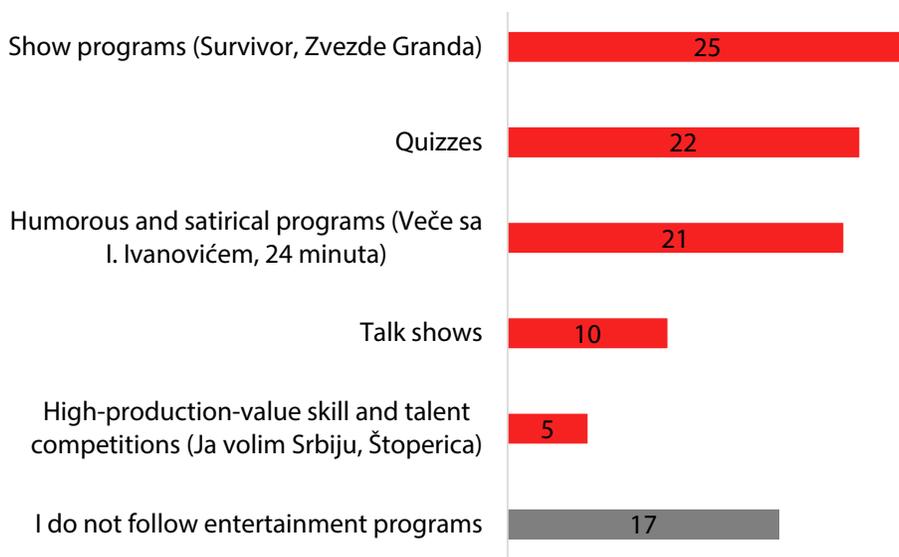
If they follow it, they most often follow cartoons and series (14%), educational, entertainment and fiction programmes (11%) and feature series or films for children, 6% each. Informative formats and children's quizzes are followed by 2% of respondents. In Vojvodina, educational, entertainment and fiction programmes for children are watched above average, while in Southern and Eastern Serbia, fiction series and series for children are watched above average.

Chart 6.8. *What type of children's and juvenile programmess do you follow? (%)*

Animated films and series	14
Educational, entertaining, and live-action…	11
Live-action series and serials	6
Films for children	6
Informative programs (Dečji dnevnik)	2
Quizzes for children	2
I do not follow children's programs	59

Previous analysis has shown that citizens are very, very interested in watching movies and series (*Figure 6.3).*).

Foreign film programmes (36%) and domestic serials (23%) are the most commonly consumed, followed by foreign serials and domestic film programmes, 16% and 15%, respectively.

The domestic film programme is watched above average in Western Serbia with Šumadija, the foreign film programme in Belgrade, and the domestic serial programme in Southern and Eastern Serbia. Foreign content is viewed above average with an increase in the level of education, and vice versa, domestic content is watched above average by citizens with lower education. Also, foreign films and series are more watched by younger or middle-aged audiences, as opposed to domestic content, which is watched above average by older cohorts.

Figure 6.9. *What movies or series do you watch most often, when you consume this kind of content?, %*

Foreign film programs	36
Domestic series programs	23
Foreign series programs	16
Domestic film programs	15
I do not follow film or series programs	10
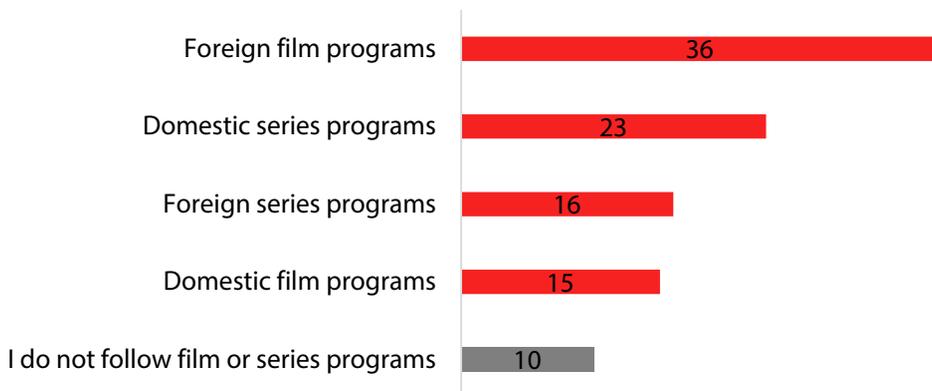
29% of respondents are interested in sports programmes (*Figure 6.3).*). **The vast majority most often watch sports broadcasts or videos, and this is what almost 50% of respondents (47%) said in this survey**. Sports magazines are followed by 7% and conversations about sports by another 6%.

Chart 6.10. *What type of sports programme do you follow most often?, %*

Category	Value
Live or recorded sports broadcasts	47
Sports magazines	7
Sports discussions	6
I do not follow sports programs	40
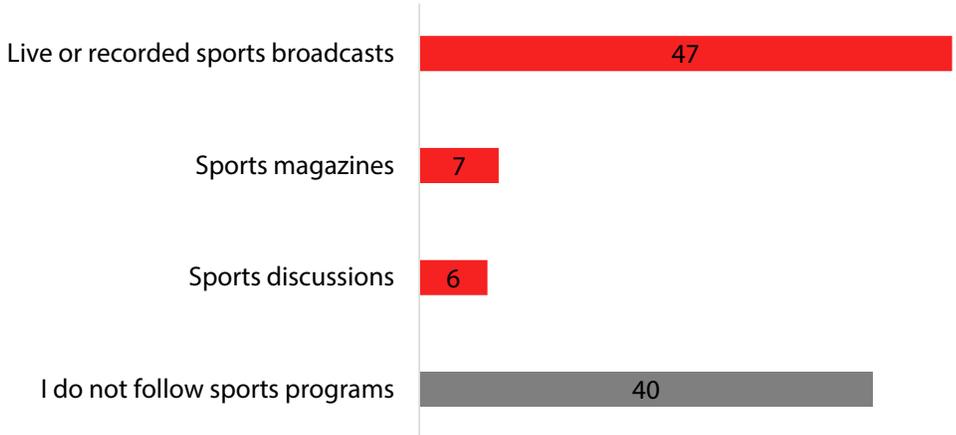
7. Media habits of Serbian citizens

Three-quarters of respondents state that they mostly combine several different media in order to get to the media content they are generally interested in – 75%. Only 16% of respondents were informed through one media, while 9% could not answer the question. With the increase in the education of respondents, the percentage of responses about information through various media is also increasing, while pensioners, respondents from Western Serbia with Šumadija, as well as those over 60 years of age above the average are informed through one media.

Chart 7.1. Do you find the media content you are interested in on one media or do you combine several different media to reach them?, (in %)
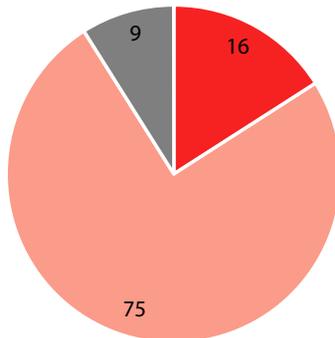
- ■ I find media content exclusively through one media outlet
- ■ I combine several different media outlets to access media content
- ■ Doesn't know, can't assess

We asked those respondents who are informed through one media to tell us which media they are interested in. **Almost a quarter of the respondents – 23% stated that it is Pink TV** (above average it is women, respondents who have completed primary school or are without formal education, pensioners, citizens living in rural areas, and those over 60 years of age), while 22% said that television is generally a medium where they find all the necessary information. Then we have the public service mentioned by 15% of respondents, and 6% of respondents say

that it is TV Prva. Other media (whether traditional or digital) were mentioned by less than 5% of respondents. Thus, 5% of Serbian citizens mention YouTube, 4% various internet portals, 3% Facebook, N1, TV Happy and TikTok, and 2% Instagram, Nova S and social networks in general.

Chart 7.2. *Only for those who stated that they find media content exclusively through one media outlet (answer 1 in question 43) Which is the media through which you get the media content you are interested in?, (in %)*
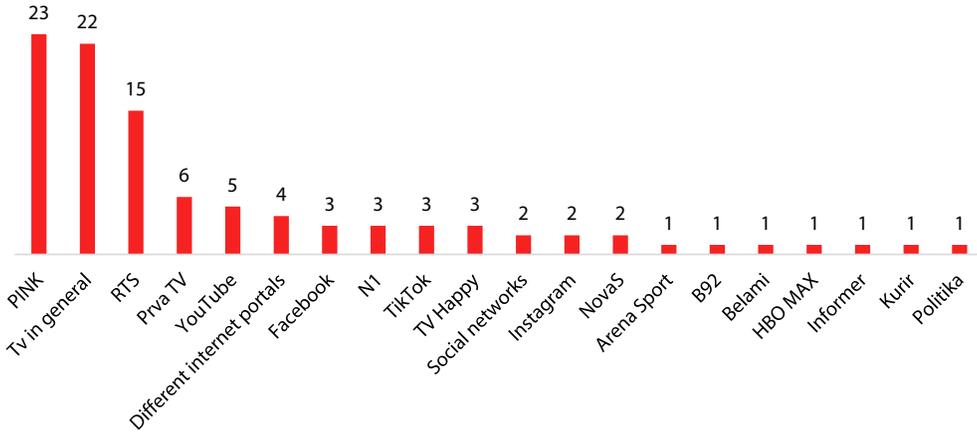
The data presented in Figure 7.3 show significant differences in the way citizens access media content and topics of interest to them. Social media plays a dominant role, while traditional media, such as print and television, still retain some level of presence, but with significantly lower frequency of viewing. The most common channels through which respondents get to the content they are interested in are social networks, primarily TikTok, Instagram, Facebook and YouTube.

TikTok stands out for its high level of daily use – more than a fifth of respondents (22%) use it daily (above average women, pupils and students and under 30 years of age), while an additional 11% do it four to five times a week. One in 10 respondents uses TikTok two to three times a week (11%) to get the information they are interested in, 5% do it once a week, while 42% of respondents state that they do not use this social network for these purposes. Instagram and Facebook record similar patterns – a third of respondents use Instagram on a daily basis, while 27% of respondents say the same about Facebook, which confirms that they are still among the key sources of information, entertainment and communication. It is important to note that in the case of Instagram and Facebook, we also have lower percentages of respondents who say that they do not use these networks – and in both cases, a third of respondents do not use either Instagram or Facebook (32%). Women, highly educated respondents, employees, and those under 50 are cited above average by daily information through Facebook and Instagram, where Facebook is the first choice for those aged 30 to 50, while those under 30 above average put Instagram in first place.

YouTube has a stable base of users who get the information they are interested in through YouTube: 25% use it on a daily basis (above average respondents under 30 years of age, as well as citizens of Vojvodina), and another 18% several times a week (10% four to five times a week and 8% two to three times a week), which makes it a significant source of thematic and educational content. Youtube is not used by 27% of respondents. Twitter (network X), although present, has a limited reach – more than half of respondents (54%) do not use it at all, while one third of respondents state that they use this network to some extent, of which 9% on a daily basis.

In addition to social networks, websites and portals (such as B92, Mondo, Kurir, Blic, Telegraf, Radar, Nova S...) are an important channel – almost a third of respondents visit them daily (18% daily, 11% four to five times a week). Finding information that interests them through the Internet portal is stated above average by highly educated respondents, aged 30 to 50, as well as residents of urban areas.

Then we have 10% of respondents who use them at least once a week, and 19% do it two to three times a week. On the other hand, 34% of respondents said that they had not found the information they were interested in on internet portals and websites in the past period.

Radio stations are also followed relatively often – 20% of citizens listen to them every day. When it comes to print media, more than half of the respondents (59%) state that they do not use them, which shows a long-term decline in the readership of newspapers, and only 5% of respondents say that they do it on a daily basis (primarily pensioners and respondents over 60 years of age).

5% of citizens follow specialised news channels on a daily basis in order to get the information they are interested in, 5% do it four to five times a week, 17% two to three times a week, 12% once a week, while 51% do not do it at all.

Cable TV stations are consumed by 20% of citizens on a daily basis in order to find topics and content that interest them (29% of respondents do it several times a week, and 8% once a week). Daily information via cable television is cited above average by men, highly educated citizens, and those living in Belgrade and Vojvodina. On the other hand, 35% of respondents do not use them at all.

Regional and local televisions as a place where they found information they are interested in on a daily basis during the past week are cited by 10% of respondents (above average oldest respondents and citizens living in Southern and Eastern Serbia), but more than half of the respondents state that they do not follow these televisions at all with the aim of reaching the content and topics they are interested in (55%).

Chart 7.3. *How many times during the previous week have you found media content/topics that interest you through…?, (in %)*

Media	Never / Not once	Once	2 to 3 times a week	4 to 5 times a week	Daily / Every day	Once
Social network TikTok	42	5	11	7	22	13
Social network Twitter	54	6	10	6	9	15
Social network Instagram	32	5	12	8	33	10
Social network Facebook	32	8	15	9	27	9
Social network YouTube	27	8	21	10	25	9
Websites, portals (B92, Mondo, Kurir, Blic, Telegraf, Radar, Nova S…)	34	10	19	11	18	8
Radio stations (Radio S, Play radio, local radio stations…)	34	11	18	9	20	8
Print media (daily and weekly newspapers you buy at newsstands)	59	10	12	4	5	10
Specialized news channels (Vesti, Tanjug, Euronews…)	51	12	17	5	5	10
Cable TV stations (N1, Nova S, K1, Kurir, Blic…)	35	8	21	8	20	8
Regional or local TV stations (e.g., TV Mag, TV5 Užice, TV Vranje…)	55	12	12	4	10	7
TV stations visible throughout the Republic of Serbia (RTS, PINK, Prva, Hepi, TVB92)	28	10	16	6	36	4

■ Never / Not once ■ Once ■ 2 to 3 times a week ■ 4 to 5 times a week ■ Daily / Every day ■ Once

Finally, **TV stations that have a national coverage license still have the largest permanent audience base that turns to them to find the information they are looking for among traditional media – as many as 36% of respondents watch them daily, a total of 22% do so several times a week, one tenth at least once a week, while the percentage of those who do not follow them is 28%.** Women, respondents who have completed primary school or are without formal education, pensioners, over 60 years of age and respondents from Vojvodina above average state that they have found media content and topics of interest to them on a daily basis through television with national coverage. Overall, digital media and social networks play a dominant role in informing citizens daily, while traditional media (especially print) are receding into the background. Nevertheless, national television and radio remain relevant sources, especially for populations that do not use the internet or prefer traditional formats.

8. Media expectations

The research shows that **there is no single medium that fully meets the needs and interests of most Serbian citizens – Chart 8.1**. Although **46% of respondents** believe that such a medium exists, almost a large proportion of the population — **39%** — estimate that **there is no** media that fully covers the topics and content they are interested in. An additional **15%** of respondents could not estimate or did not want to answer.

Chart 8.1. *Is there currently a media outlet in Serbia that fully satisfies your interests in terms of media topics and content that interests you? (in %)*

- It exists, and it is:
- There is no such media outlet
- Does not know / does not wish to answer
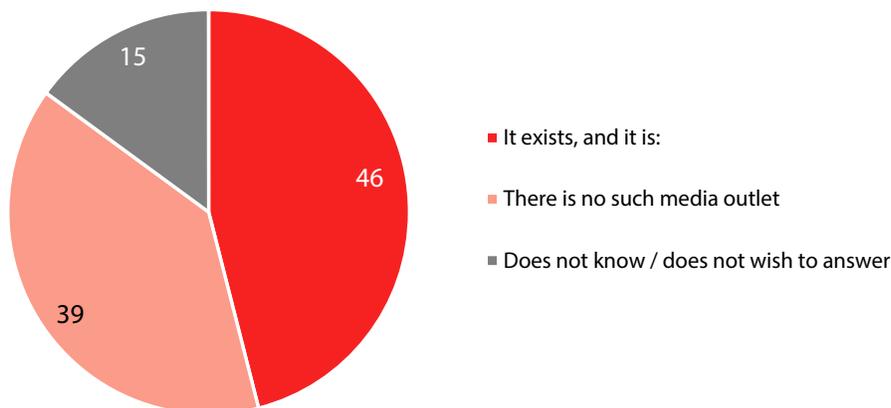
Such a division of opinions indicates **a pronounced fragmentation of the media audience** and a lack of trust in the existing media system to meet the different information needs of citizens. The subjective assessment of the existence of an "ideal" media is directly related to the level of education, age structure and the degree of digital inclusion: younger and more educated respondents, who consume various sources via the Internet and social networks, are more likely to express dissatisfaction with homogeneous and traditionally conceived media.

On the other hand, older people and citizens with lower education are more likely to show loyalty to certain TV stations that have a national coverage license and feel that they "meet their needs", reflecting long-term habits and stable patterns of media consumption.

Overall, the results show that Serbian citizens perceive a **significant gap between their interests and the media offer**, which opens up space for the development

of specialised and thematically diverse media — especially digital platforms that can provide personalised and interactive content.

Lower-educated citizens are more likely to believe that there is a media outlet in Serbia that satisfies their interests, while highly educated citizens show greater skepticism. **Higher levels of education** also lead to greater criticism of the media.

The perception of the existence of an ideal medium varies significantly according to employment status. The highest level of satisfaction is expressed by **pensioners**, while employees **in the public sector and private sector are** much more critical. **Students and the unemployed are** more likely to believe that such a media does not exist, reflecting lower levels of trust in the media among younger and more active citizens.

With increasing age, there is a growing belief that there is a media in Serbia that fully satisfies the interests of citizens. Young respondents are the most skeptical and most often believe that such a medium does not exist, while older respondents maintain more trust in traditional media, primarily television.
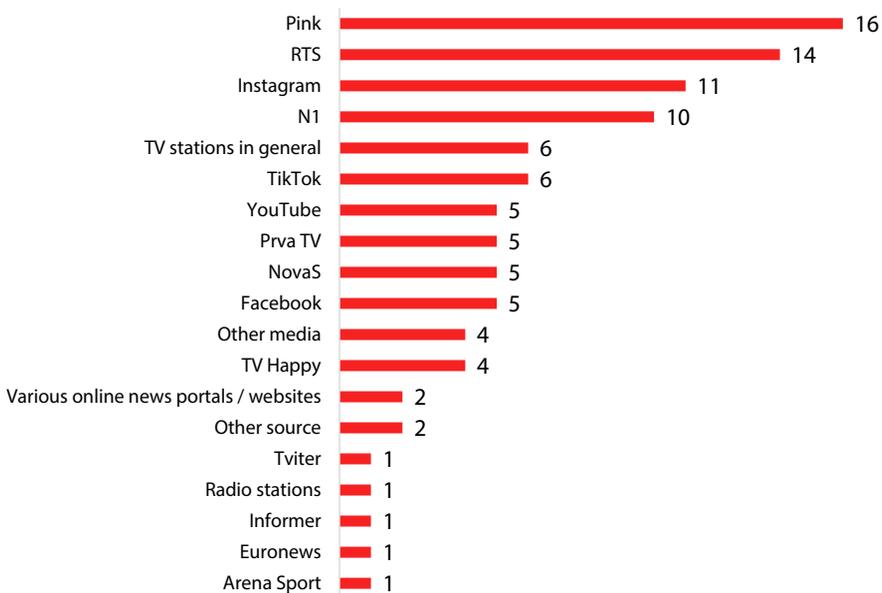
The difference in the perception of the existence of a media that meets the needs of consumers is also noticeable in the region of Serbia in which they live – **in Vojvodina and Belgrade**, a slightly larger proportion of citizens believe that there is a medium that satisfies their interests, while in Southern and Eastern Serbia this share is lower with a larger number of those who believe that such a medium does not exist. These findings indicate slightly higher levels of media satisfaction and trust in more developed, urban regions compared to the south of the country.

When asked to name a media outlet that fully satisfies their interests in terms of topics and content, the responses indicate a marked **polarisation of media preferences** between traditional television channels and digital platforms – Figure 8.2.

The largest number of respondents singled out **TV Pink (16%)** and **RTS (14%),** whereby these two televisions retain the status of the most recognisable and influential sources of information in Serbia. These results show that there is still a strong orientation towards traditional media, especially among the older and more conservative part of the population who perceive television as the dominant and most reliable source of information.

At the same time, **Instagram (11%)** and **N1 (10%)** occupy high positions, indicating a **change in generational patterns of media consumption**. Instagram, as a social network that combines news and entertainment content, is becoming an increasingly important channel for the transmission of social and political messages, especially among younger respondents. N1, on the other hand, attracts more educated and critical segments of the population and those who are between 40 and 60 years old.

Figure 8.2. *Is there currently a media outlet in Serbia that fully satisfies your interests in terms of media topics and content that interests you? (in %)*

| Media outlet	%
Pink	16
RTS	14
Instagram	11
N1	10
TV stations in general	6
TikTok	6
YouTube	5
Prva TV	5
NovaS	5
Facebook	5
Other media	4
TV Happy	4
Various online news portals / websites	2
Other source	2
Tviter	1
Radio stations	1
Informer	1
Euronews	1
Arena Sport	1

Other media — such as **TikTok (6%), YouTube (5%), Prva TV (5%), Nova S (5%)** and **Facebook (5%)** — make up the second layer of recognisable sources of information. This trend indicates that citizens are increasingly combining their information between television and online sources, with a shift to platforms that offer faster, shorter and more visually appealing content.

At the bottom of the list are **specialised and smaller news channels**, such as portals, radio stations or print media, with symbolic percentages (1–2%). This data further confirms that the trust and interest of citizens has been concentrated around a few strong brands, while most of the smaller media have lost their recognition in the public.

Overall, the results suggest that **there is no one "ideal" medium in Serbia that meets the needs of the majority of citizens**. Instead, the media landscape is sharply divided between different types of audiences — the traditional, which prefers television, and the digital, which is increasingly migrating to social media and online content.

Those citizens, who stated that they do not have a medium that satisfies their interests, and of which there are more than half, choose television as their potential ideal medium **(36%)** – Chart 8.3. This data confirms that television, despite the growth of digital media, **retains a central position in the media habits of Serbian citizens**, thanks to its high availability, visual format and perception of trustworthiness, especially among the older and less digitally active population.
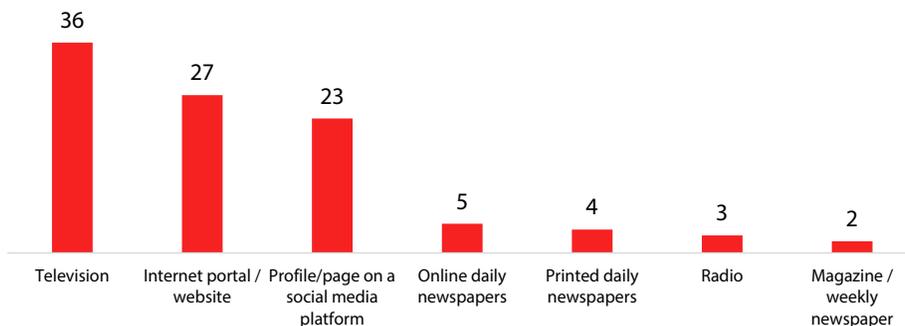
On the other hand, a significant proportion of respondents would prefer to be informed through **internet portals (27%)** and **social media profiles/pages (23%),** which clearly indicates the **growth of digital orientation of the audience** and the increasing role of the Internet in the formation of media preferences. Together, these two categories comprise half of the respondents, confirming that **digital media are becoming a key space for the transfer of information and the creation of content** that citizens consider relevant and accessible.

Traditional written media — **the online versions of daily newspapers (5%), print newspapers (4%),** as well as **magazines and weeklies (2%)** — have significantly less appeal, indicating a **decline in reading habits and a decline in trust in traditional formats**. Radio also records a marginal level of preference (3%), confirming its shift in roles — from the main news media to the accompanying medium.

Lower-educated respondents would most often choose **television** as the main source of information (over 50%), while with the increase in education, the turn to **Internet portals and social networks clearly** increases. Highly educated citizens are more likely to choose digital sources, which indicates greater media literacy and the need for more diverse content, while less educated citizens remain tied to traditional formats.

Age differences in preferences are pronounced — **young people (18–29)** would by far choose **social networks** and **internet portals** the most, while **those over 60 would** almost exclusively prefer **television**. Middle generations (40–59) are divided between television and digital media, which confirms the transient character of their habits. These findings indicate that age is **the most important predictor of media format choices**, with younger people dominantly gravitating towards the Internet, and older people gravitating towards television.

Regional differences in media preferences are also pronounced. In **Belgrade,** internet portals (52%) **and** social networks (19%) **dominate**, while **television is** far less represented (26%). On the other hand, in **Vojvodina** and **Western Serbia with Šumadija,** television remains the dominant choice (about 43%), while in **Southern and Eastern Serbia a** slightly higher orientation towards internet

portals was observed (28%). These findings confirm that **the digital transformation of media habits is most pronounced in Belgrade and more urban areas**, while in other regions television continues to play a leading role.

When the citizens of Serbia are asked what kind of media would fully satisfy their interests, there is a clear tendency towards a **combination of informational, entertainment and cultural content** – Graph 8.4.

In the first place is **film and series programming (41%),** which indicates that audiences still strongly value media that offer the possibility of relaxation, emotions and identification through narrative formats. Right behind it are **news (38%)** and **entertainment (37%),** which together form the core of media expectations – citizens want to be both informed and relaxed, but without excessive sensationalism.

Figure 8.4. *What three contents/topics should this media cover in order to satisfy your interests? (Possibly more answers, in %)*
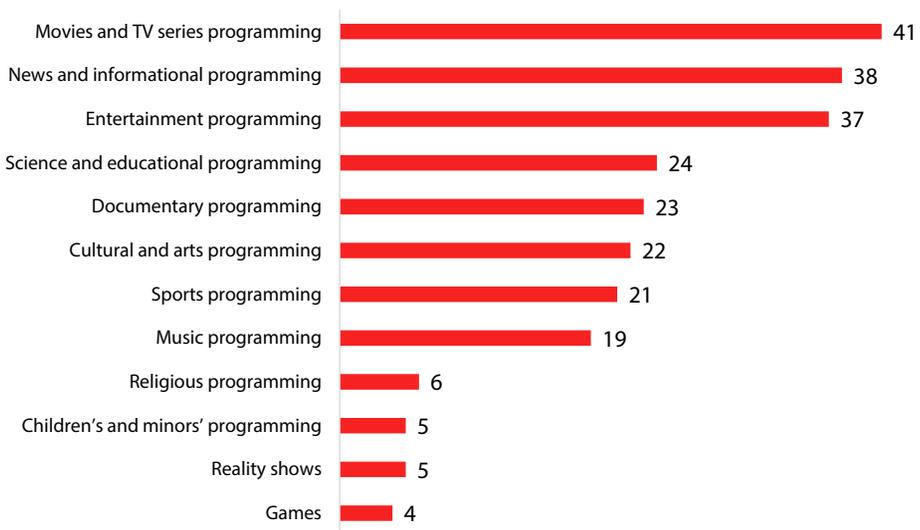
A significant segment of the population is also interested in **scientific and educational (24%), documentary (23%)** and **cultural and artistic programs (22%),** which shows that there is a stable need for content that has an educational, cultural and socially relevant character. In particular, these data highlight that a medium that strives for greater audience trust should combine an informative approach with cultural and educational dimensions. However, it should be borne in mind that these are often **socially desirable answers of** respondents and that ratings of emissions of this nature do not correspond to the alleged interest of citizens.

On the other hand, interest in **sports (21%)** and **music programs (19%)** is moderate, while **religious (6%), children's (5%), reality (5%)** and **game programs (4%) are** at the very bottom of the list, which in the case of reality suggests that citizens are generally not interested in trivial or commercial content of this kind.

Overall, the results indicate that the ideal medium in the perception of citizens would be the one that combines **quality informative content with cultural, educational and entertainment programs**, with the absence of banality and dominance of scandalous topics. According to the findings, such a medium would contribute the most to regaining the trust of the audience in the media space of Serbia.

9. Harmful media content

When asked to what extent negative (harmful) media content, such as propaganda, fake news, disinformation and spinning, is represented in our media, as many as 37% of respondents believe that such content is very present in our media. In addition, an additional fifth of respondents (21%) believe that such content is more than not represented. On the other hand, 14% of respondents believe that there is no harmful content at all, while 11% say that they are no more represented than they are. These data show that more than two-thirds of Serbian citizens have the perception that harmful media content is present in the media (the sum of responses is: very represented, more yes than no and more no than yes). It is interesting that a large percentage of respondents – 17%, could not assess whether such content exists on our media scene. A high percentage of respondents who were unable to assess the prevalence of harmful media content may indicate a potential lack of media literacy among citizens, which makes it difficult to identify and evaluate such content, but also the complexity of the media environment and the challenges in distinguishing between correct and incorrect information.

Chart 9.1. *To what extent is harmful content (propaganda, fake news, disinformation, spinning) present in our media? (%)*

Category	%
Very represented	37
More yes than no	21
More no than yes	11
Not at all	14
Doesn't know, can't assess	17
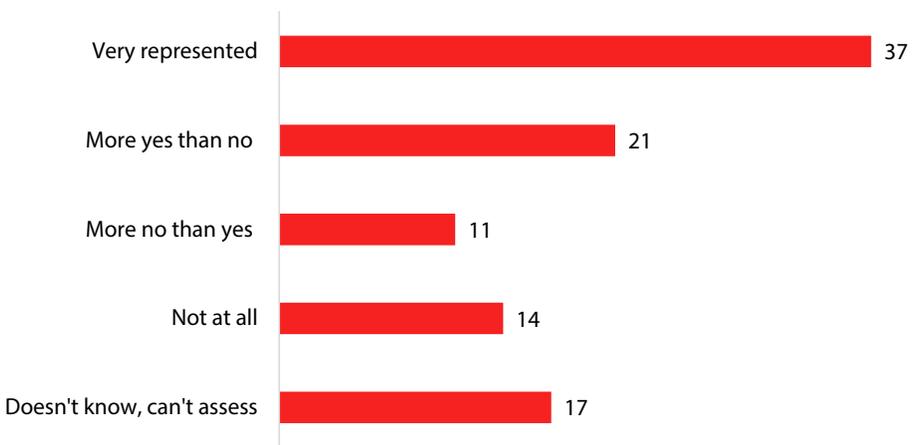
The perception of a high prevalence of harmful content increases with the level of education, reaching 56% among the highly educated. Also, this perception is shared above average by employees in the private sector, pupils and students, residents of urban areas, as well as citizens of Belgrade.
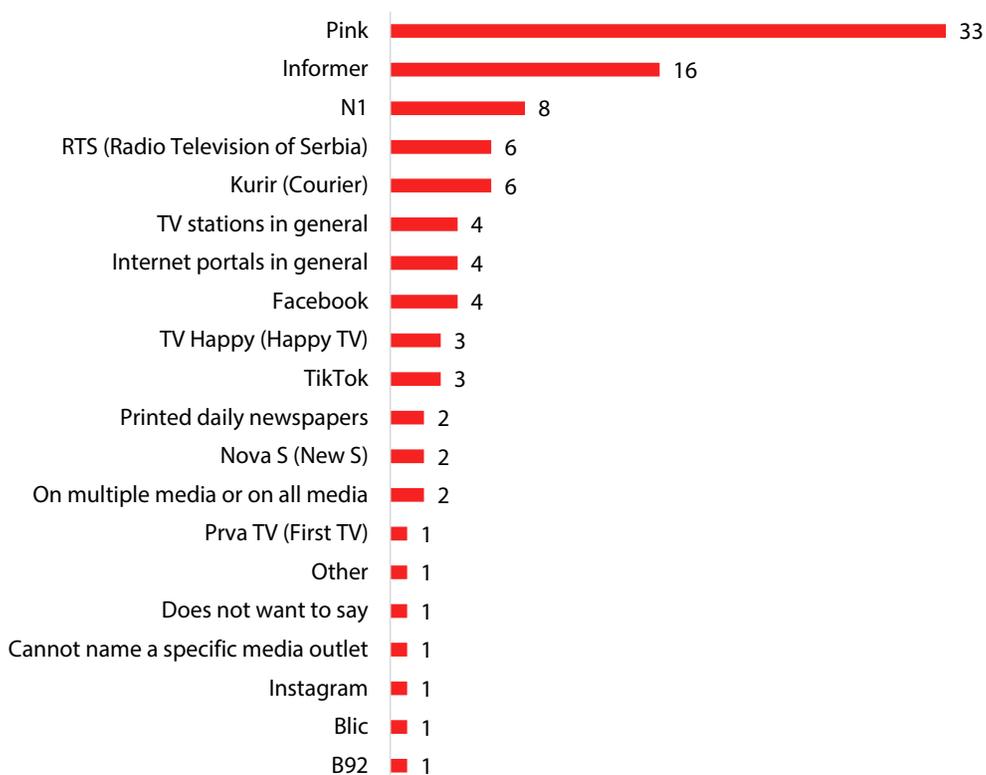
Citizens of Serbia who generally stated that they notice harmful content in the media were asked to specify in which type of media such content is most prevalent. **According to the responses of Serbian citizens, the dominant source of harmful content is television with 67%.** Significantly fewer respondents, 13%, state that they notice harmful content on internet portals and websites. Social networks (Facebook, Instagram, TikTok, YouTube, etc.) were marked as a source of harmful content by 9% of respondents. A similar percentage of respondents believe that harmful content is found in printed daily newspapers and online daily newspapers (5% each), while the lowest number of respondents (1%) find harmful content in magazines/weeklies.

Figure 9.2. For those who believe that there is harmful content in our media! In which type of media are harmful media content most prevalent (propaganda, fake news, disinformation, spinning)? (%)
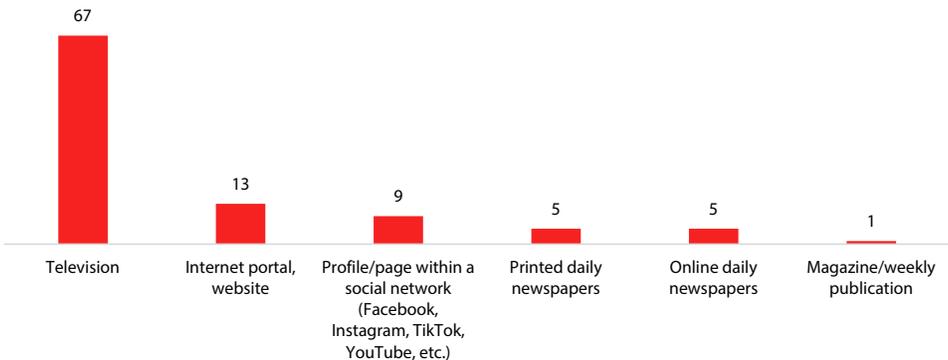
At the end of the study, we asked the participants to single out one specific medium in which they noticed the most harmful content. **In the first place is TV Pink, which was singled out by a third of respondents, while right behind is Informer, which 16% of citizens believe is a medium where harmful media content can be found**. Both Informer and Pink were cited above average by highly educated respondents, as well as respondents under 40 years of age, but also by those respondents who are generally informed through social networks and internet portals, which indicates that citizens who actively use digital platforms have a more critical attitude towards the content of traditional media. Then we have 8% of respondents who cited N1 and 6% of respondents who opted for RTS and Kurir. 4% of respondents believe that harmful media content is generally present on television, but also on internet portals, and this percentage of citizens also cited Facebook as a place where they could apply negative media content. Figure 9.3 shows a complete list of all the media outlets cited by citizens.

Chart 9.3. *For those who think there is negative content in our media! In which specific media have you noticed the most harmful content (propaganda, fake news, disinformation, spin)? (%)*

Media	%
Pink	33
Informer	16
N1	8
RTS (Radio Television of Serbia)	6
Kurir (Courier)	6
TV stations in general	4
Internet portals in general	4
Facebook	4
TV Happy (Happy TV)	3
TikTok	3
Printed daily newspapers	2
Nova S (New S)	2
On multiple media or on all media	2
Prva TV (First TV)	1
Other	1
Does not want to say	1
Cannot name a specific media outlet	1
Instagram	1
Blic	1
B92	1

10. Qualitative research – Methodology

The research has been carried out	Centre for Free Elections and Democracy (CeSID) with the support of the Council of Europe Office in Belgrade
Fieldwork	Between 4 and 6 November 2025
Type and size of the sample	Sample (22 participants)
Selection of respondents and sample frame	3 focus group discussions with adult citizens of Serbia (youth, elderly, national minorities)
Research technique	Focusgroup interview
Research Instrument	Moderator's Guide

Focus group interviews were conducted between 4 and 6 November 2025. The research was conducted on a deliberate sample of 22 participants over the age of 18, citizens of Serbia. The interviews were conducted with the help of focus group discussions, held online, via the Zoom platform.

A total of three focus group discussions were held (with the younger population, with the older population, i.e. with representatives of national minorities). The maximum number of participants is 8 per focus group. The gender, age, educational structure of the respondents, as well as the place of residence (rural and urban settlements) were taken into account. The average duration of the discussion was 80 minutes.

As a research tool, a guide for a moderator was used, formed in cooperation with the client, which has the form of a semi-structured interview.

11. Qualitative research – Sample description

Based on the methodology established during the implementation of this research, the following categories of respondents were included:

Gender structure: 12 males and 10 females.

Age: one focus group with the younger population (18–40), one focus group with the older population (40–65), one focus group with national minorities (youngest participant 27, oldest participant 57).

The average age of the focus group participants is 39.3 years.

Educational structure: high school 9 participants, college/university 13 participants.

Nationality: Serbian 15, other 7 participants (Albanian, Bosniak, Croat and Hungarian ethnicity).

12. Qualitative research – Media habits

I n all three focus groups, there is a clear **trend of switching to digital sources of information**, primarily internet portals and social networks. Traditional media, especially printed newspapers and radio, are used minimally, most often "on the move" (in the car, at work…), while television retains the role of a source of information for older participants, but is also used as a means of entertainment.

All three groups show a decline in trust in traditional media and an **orientation towards an individualised approach to information**. For younger and some minority participants, this leads to fragmentation of information (taking only what they are "interested in"), while older respondents tend to combine sources and "assess credibility for themselves". Print newspapers and radio have almost lost their status as relevant sources, while television retains its symbolic role as the "official" media, but with reduced trust. On the other hand, social media functions as the primary space for information and social commentary, especially among younger people.

For **younger** participants, focus groups (18–40 years old) are dominated by the Internet as the primary channel through which they get information, while television and radio are almost completely marginalised. The information is monitored daily and for several hours, often in real time, through social networks (Instagram, TikTok, Facebook) and online portals. Online portals are not used in a planned and targeted way, but within the framework of everyday "online life" (most often when they see something on social networks and from there the news takes them to the portal).

Participants point out that **they trust video content and recordings** more ("what I see") than media interpretations, expressing skepticism about the mediation of information by journalists and editors.

When it comes to participants who are slightly **older** (40–65 years old), there is a combined way of informing, which means that the Internet is used daily, but television and radio still play a significant role. Most of the participants no longer buy newspapers, although some (especially those with longer reading habits) still follow weeklies such as NIN or Radar, which they associate with tradition and quality analysis. The motive for combining media and using multiple sources is to check information and look for different perspectives, which indicates a more developed media reflexivity compared to the younger group.

When it comes to groups with **national minorities**, it shows different patterns of access to the media, but also a slightly lower intensity of daily monitoring. Namely, some of the participants point out that they use television as their primary medium ("so as not to be completely uninformed"), while others prefer social networks and portals available on the phone. Printed newspapers and radio are almost not used, and the reason given is distrust and aversion to sensationalism and tabloids, as well as the absence of habit. In some cases, there is also a distance from political content, so there is a conscious avoidance of news programs and the focus is placed on entertainment or cultural content.

"Why do I use the Internet the most, that is, various social networks? Because what I am interested in comes to me the fastest. So... and somehow, I began to believe the most what I saw. And not what was chewed and conveyed to me. But now it's all under some cameras, footage, whatever... I look at the footage for what I'm interested in and that's it." (18–40 years)

"Social networks are mostly current – that's where everything pops up." (18–40 years)

"It's hard to get the right information, that's why I follow everything – the Internet, television, and the press." (40–65 years)

"I used to read more of the newspaper, but now it's easier for me to look at the portal when I need it." (40–65 years)

"I'm somehow more comfortable using portals and news where I'm going to scroll and read only what's going on... Me... only what interests me" (40–65 years old)

"I watch different types of media every day. I watch the newspaper, I watch TV, I listen to the radio in the car. I almost never read the newspaper. I almost never read the newspaper because I do now, but because I just don't have that habit anymore. I've lost the habit, everything is available at the click of a button and that's it... Most often, so I wouldn't be able to say which TV I watch most often, if that was the question. N1, Nova S, B92 maybe." (40–65 years)

"Mostly, well, over the phone, and not too much, and there, on television, not to be, that I'm not really informed, but well, poorly." (National Minorities)

"Newspapers, no, because, to tell you the truth, I am repulsed by the front pages, and the bombastic headlines, and the pictures, and everything else, and the radio... Well, we don't have a habit of listening to the radio like this. We listen to it over the Internet... And mobile phones, the radio has fallen into oblivion." (National Minorities)

"I follow Pink for these current events around the protests, and that, when we had SBB, but now we don't, my husband and I mostly followed this, as it is called, N1. Personally, not too much, but in order to be informed, something... I use television more for series, not for politics." (National Minorities)

During the focus group discussions, we paid special attention **to social networks and online practices**. Participants of all three focus groups say that social net-

works have become, more or less, a key channel for information, communication and everyday orientation in the media space. Although usage patterns vary across generations and social positions, all groups are united by their reliance on digital resources, high frequency of use, and the belief that networks provide faster, more direct, and more diverse access to information than traditional media.

The use of social media and digital platforms in all three groups indicates a shift towards **an individualised, fragmented and personalised media experience**. *The speed of information, the possibility of direct testimony and interaction, but also fatigue from overabundance and doubt about the accuracy of the content* are common features of this process. **On the whole, participants no longer draw a clear line between "media" and "networks": the boundaries between information, entertainment and communication are almost erased**. At the same time, **generational and structural differences (in access, resources and habits) shape different media cultures** – from "what I see first" instant information in the younger, to selective and reflective use in the elderly. Members of national minorities are dominated by a pragmatic approach – networks are used for accessibility and speed, while socio-economic topics are of greatest interest (prices, pensions, jobs).

"I'd rather watch a movie than read what someone else has said."

"Live posts and stories are now what they used to be."

"We can get almost nothing on traditional media – everything is filtered."

"There is too much information – it is difficult to distinguish between truth and lies."

"I'm overwhelmed with things that don't interest me, but I still pick up the phone all the time."

"I know more people on Facebook than I have numbers on my phone."

"You have 100 people on the media filming from the spot, so you judge for yourself what the truth is."

"There's only one operator in my area – I have to use what they offer."

"The prices of cable packages are too high, and then they cancel what I'm interested in."

"I do everything on the phone, it's the only medium I always carry with me."

For **older** participants, social networks occupy an important place, although they also use traditional media. Facebook is the most common, mainly as a channel for communicating with friends, exchanging local information, or following thematic groups (hiking, ads, markets). A smaller number use Instagram or LinkedIn (used for professional contacts and tracking business events). YouTube has also been noted as a source of documentaries, podcasts and music shows, and some participants also use it for educational purposes.

Participants point out that they use networks primarily for information and connection but maintain a **critical attitude towards the superficiality and speed**

of information. A larger number prefers **written content**, i.e. text posts and articles – over short video formats, considering reading an important form of mental activity and concentration. There is also nostalgia for printed editions, but also the awareness that the habit of reading newspapers is "lost" because all information is "available at the click of a button".

Older participants see networks as a fast but unreliable source of information, while they associate traditional media with analytical and deeper content (examples of which include Peščanik, Veliki priče, Danas). Still, they recognise that the abundance of information makes it difficult to distinguish truth from lies, leading to a kind of "information fatigue." In addition, their statements also include **structural barriers to access to the media** – the monopoly of certain providers, the unavailability of certain channels and the increase in subscription prices.

13. Qualitative research – Availability, quality and diversity of media content

Participants from all three groups state that **they can "generally easily access" the desired content,** but that easy access is unevenly distributed: younger people are almost free of obstacles (everything is on the phone, "everything is just a click away"), while **older people and members of national minorities more often mention structural, economic and language barriers**.

When it comes to older participants (40–65), they say that the availability of media content is high thanks to the Internet, but market barriers stand out: monopolies/providers, unavailability of certain channels (e.g. N1/Nova S), increase in package prices and unpredictable changes in the offer. That is why some of the participants are looking for media content and information on portals and YouTube platforms, as compensation for TV unavailability. There is also a sense of information fatigue ("it's hard to choose the right one").

Younger people (18–40 years old) say that access to various media content is very easy and constantly present (phone as the primary device), the obstacles are rarely financial (some pay premium/subscriptions to avoid advertisements), and more often they are time-based, i.e. obstacles in terms of lack of attention (long "scrolling"). Younger respondents are aware that content comes through algorithmic feeds, and online portals are opened secondarily (after social networks).

Finally, members of national minorities say that general accessibility is "good", but the language barrier is emphasised (e.g. in municipalities with Albanian population where younger people have less knowledge of Serbian). Also, the grey access market (platforms where it is possible to find television channels without paying for the provider, Telegram channels...) is mentioned as a way to circumvent the restrictions of the offer/provider, with the awareness that it can be "unofficial/illegal".

When asked what quality media content is for them, in all three groups **"quality" is most often defined through: accuracy/credibility, objectivity/polyphony (presence of multiple sides), analytical depth and context**, and then interestingness/usefulness (practical information for everyday life). Older people are more likely to look for perspective and "serious formats" (debate shows, documentaries, cultural programs, educational series), while for younger people the

emphasis is on accuracy and immediacy ("visual evidence", on-the-spot footage) and on transparent conversations (podcasts without "limited time"). Members of the minority, in addition to accuracy and objectivity, highly value the socio-economic usefulness of information (information on prices, pensions, jobs) and accessible language.

The overwhelming majority believes that **the media in Serbia rarely produce stable quality (informative) content**.

The most frequently mentioned positive examples of quality content were: RTS 2/3 program, namely cultural/educational and documentary program, "Kvadratura kruga", Mira Adanja-Polak's shows; Insajder TV program – documentary and investigative formats that participants see as relatively more balanced formats (unlike other televisions); Quizzes and some thematic shows as "islands" of quality.

On the other hand, examples of low-quality content were: programs with political and tabloid bias ("fan blocks", the same story in different editions); content with low professional standards (profanity, "spit", clickbait); advertising and promotion of bookmakers in prime-time; i.e. television news programming in general (a sense of control/agenda and a low level of accuracy; participants often prefer to verify this content through recordings and networks).

Although **the participants believe that there is a diversity of formats** and channels, at the same time **they assess the diversity of opinions and cultural content as insufficient and suppressed**. Older participants emphasise that "there is not enough culture" (low budget, weak stimulus "from above"), and that quality shows are little watched and marginalised (e.g. on RTS 3). Younger people notice quantitative diversity (there is "everything and everyone"), but not qualitative diversity ("there is diversity, but not qualitative diversity"). Finally, minorities appreciate reportage/cultural formats that are less able to compensate on social media.

All three groups **recognise a structural gap in the field of cultural-educational, documentary and children's** programming, with a desire for plural debates that involve "both sides" and multiple perspectives. Some of the content that was "once searched for on TV" is now on YouTube and social media, but participants point out that this only partially resolves the availability (fragmented, unregulated).

When it comes to the desired formats and presentation of media content, video content stands out above all (especially for younger students), but a combination of formats is also mentioned: video content with text and audio ("to watch, but also to listen in the background; I've got a short text for quick reference."

"Information is easy to come by, but it's hard to choose the right one."

"There's only one operator in my area – if you want to watch something else, you have to change your cable and go through a hell of paper."

"A good media outlet must have opinions and arguments, not just arguments."

"Of the domestic quality programs that I have been following in the past, the Sasvim prirodno and Fantastična planeta. I like to look at it with my children because it has useful information, these are some topics that interest us as parents and children of the same age as my children of 14 and 8 years old. So that's something nice that I can still look at. But unfortunately. Yes I do. Unfortunately. There is a much greater number of those channels, televisions and shows that we have to avoid in a wide arc. And that we explain to them afterwards why an advertisement for a bookmaker comes out, and mom and dad say that a bookmaker is a bad thing. Here's a literal example. That is, how to direct children and what to tell them, and they see that it is literally on every channel advertising for the bookmaker. There. That's a big problem in general."

"An insider knows how to make a good contribution, has both sides, and somehow is fair."

14. Qualitative Research – Trust in the Media

When we asked the respondents to tell us how much they trust the media in Serbia and to give a school grade for (dis)trust, the answers were such that we can conclude that **trust is low to medium-low in all three groups**. The common conclusion is that the domestic media space does not provide enough reasons for trust, primarily due to **bias, politicisation and tabloidisation of the news program**.

Across the board, **trust in the media is the lowest**. Participants consider that the content broadcast on television stations that have national coverage licenses is largely controlled, one-way and politically colored, so the news program is perceived as "fan" rather than professional. Pink, Happy and Informer are often mentioned, which are perceived as a symbol of sensationalism and propaganda. Some participants point out that "everything that is broadcast looks the same" and that channel changes do not make a real difference in tone and content.

At the same time, there is **a selective trust in certain media,** which are recognised for their more professional approach and attempt at balanced reporting. The most common were N1, Nova S, Insajder and, to a lesser extent, RTS 2 and RTS 3, which are considered to be places where analytical and cultural content can still be found. Some of the participants also report that they regularly check information in foreign sources such as the BBC or Deutsche Welle to get a bigger picture and compare different narratives.

Younger participants show a marked shift of trust towards social networks, especially Instagram and the X platform (formerly Twitter), where they are looking for "realistic recordings and live broadcasts". They believe that videos, streams and testimonies of individuals are the most reliable way of informing them because they allow visual verification of events. However, there is also **awareness of possible manipulation in this area**, especially in the context of the spread of fake news and the use of artificial intelligence to create content.

Members of national minorities also assess trust in the media as low, but it is partly increased by the presence of digital and online portals and social networks. This group is also dominated by suspicion of television content, while the Internet is recognised as a more open, but also uneven space, with a higher speed of news flow, but also a higher risk of disinformation.

The common conclusion of all groups is that **information must be checked multiple** times – by comparing domestic and foreign sources, reading comments, watching original footage and consulting different platforms. Participants developed **self-verification strategies** and became highly aware of the risks of manipulation. This attitude is best described by a sentence that has been repeated many times: "I believe only if I have seen with my own eyes."

> *"I give it a three. There are a few media outlets that I trust, but I'll have to check everything else. You can't rely on anyone anymore."*

> *"Television is my unit. I know that they are all set up to do what they want, not what we want."*

> *"Today you have to check the news in two or three places before you believe it, even when it doesn't matter."*

> *"I don't trust anyone. I take everything with a grain of salt – neither television nor the Internet. Everything is very questionable and difficult to verify."*

> *"Everyone works for someone today. That's why I'm informing myself, I'm putting together a picture of several parts."*

In the group of older participants, it was shown that trust in the media generally remains low, regardless of the format, but at the same time **a relative distinction is made between traditional and digital** sources of media content. **Television and print, despite doubts, are still recognised with a certain level of institutional responsibility.** In other words, traditional media is not fully trusted — but the internet and social networks are perceived as an even more unreliable and disorderly space. Participants point out that "anyone can post anything" on the Internet, that content is often based on rumors and half-information, and that the lack of editorial control reduces trust. On the other hand, television, radio and print media are assessed as systems that at least "have someone signed" and function within a professional structure, which does not mean that they are trusted, but that they are expected to have minimal responsibility for the information placed.

However, there have also been voices that clearly reject trust in traditional sources, stating that news programs are "twisted truth", and that the veracity of news today can be more easily verified through recordings, broadcasts and live content on networks. As a special exception, several participants singled out investigative journalism as a form of media work that still deserves trust, whether published in print media or online. Portals such as KRIK are cited as rare examples of professional and verifiable journalism, while tabloids and sensationalist media, regardless of format, are recognised as sources of disinformation.

Regardless of age and affiliation, all three groups point to **reliability, punctuality, and (relative) impartiality as the most important factors of trust**. All groups combine multiple sources, albeit in different order: older people rely on reputational newsrooms, younger ones rely on networks and video evidence, and minorities rely on local portals and direct sources.

The biggest differences are observed in verification strategies: older people rely on the reputation of the media, younger people rely on fast online verification and "digital intuition", while minorities trust verification through personal or professional contact with sources the most.

For **older** respondents (40–65 years old), trust in the media primarily depends on **objectivity and professionalism** in conveying information. The participants clearly single out the media that they consider credible (N1, Nova S, Insajder, BBC, DW, Danas), while tabloids and "fan" channels (Pink, Informer, Happy) are completely avoided. Trust, therefore, directly affects the choice: first they decide what not to watch, and then they choose the content that seems most reliable to them. The most important factor when choosing a media is reliability, with the added value of timeliness and **compliance with one's own beliefs**. Although most seek to hear more than one side, some participants admit that they find it easier to identify with sources that confirm their values.

In **the younger** group (18–40 years old), trust is mostly associated with objectivity, transparency and thoroughness of sources. As the most positive example, they cite investigative journalism (KRIK, BIRN), because "you can see that someone really worked and researched". Younger participants also strongly **value visual evidence** – video and live recordings, which they perceive as the most reliable form of information. **In the choice of media, priority is given to reliability and impartiality, followed by timeliness. The content must be "at the right time", but also "without sensationalism".**

The main channels of information are social networks (Instagram, X/Twitter), which serve as a "radar" for quick information, while for deeper topics they move on to portals and podcasts. Although **most check the information**, the methods are intuitive: a Google search, a comparison of multiple portals, or, in the case of individuals, even a query to ChatGPT as an auxiliary check. The more superficial topics (pop culture, entertainment news) are usually not checked.

In the group of national **minorities,** trust in the media is conditioned by both linguistic and infrastructural factors. The key criteria are **reliability, verifiability and timeliness, as well as the availability of information in the language of the community.** Participants point out that in local communities (Bujanovac, Preševo) there is a gap between Serbian and Albanian media, so the audience often balances between several language sources.

When choosing a media, the most important thing is that the news contains **as much specific information as possible**, and less sensationalism. Participants are **looking for information on a number of local websites**. In the everyday context, some participants check the news through comments and testimonies on networks, while others admit that they "do not check, unless the topic personally bothers them".

15. Qualitative research – Harmful media content

Participants of all groups stated that they encounter various forms of harmful media content —primarily disinformation, hate speech and propaganda — **almost daily**. The most common examples include **manipulation of facts, deliberate distortion of information, political bias, and public targeting** of individuals or social groups. Most of the interviewees point out that they "recognise such content immediately", most often by its aggressive tone, inappropriate language, contradictions between different sources and the use of sensationalist headlines.

Older respondents most often state that they are particularly affected by the amount and intensity of hate speech on television stations that have licenses for national coverage of national televisions and tabloids. In their descriptions, emotional exhaustion, disgust and anger are felt, and some openly point out that such content "poisons the people" and "divides people". As the key actors of disinformation and hate speech, they most often mention Informer, Pink and Prva Television, while they see the cause in the connection between the media and the government, with the complete inefficiency of regulatory bodies.

It is interesting that some of the older respondents also express **an ambivalent attitude towards censorship** – on the one hand, they believe that some televisions "should be abolished", while others warn that the bans could be abused, and propose a time limit on the range and **stricter controls on content instead of bans, in order to show some sensitive content at a time when vulnerable groups of viewers would be limited in access**.

Younger respondents are most critical of news shows on television stations that have licenses for national coverage, in which they recognise both disinformation and open propaganda. **Hate speech is most often noticed in comments on social networks**, where, as they state, "everyone feels invited to write whatever they want." This group expresses a combination of aversion and irony towards this type of content – participants recognise manipulation but often perceive it as a "part of the show program" that serves to evoke emotions and clicks.

Unlike older people, younger people are less inclined to invoke prohibitions and more to the need for professional standards and regulation. Nevertheless, there is a strong sense of powerlessness and distrust in institutions: **REM is seen as a formal body with no real influence**, while the responsibility "in the end always

remains with the citizens". Participants also emphasise that older generations, who are less digitally literate, are more likely to fall victim to propaganda and disinformation.

In the group of **national minorities**, the emphasis is on disinformation related to local communities and socially sensitive topics, especially when the media deal with cases from the social protection system. Participants described examples of inaccurate and sensationalist posts about social work centres, families and children, which not only spread panic and prejudice, but also call for the lynching of social workers. Such content is recognised as extremely harmful and as an example of professional irresponsibility of journalists.

Minority communities insist more strongly on the **accountability of the state and institutions**, including ministries and competent authorities, as well as on the need for legal sanctions. This group also shows **the greatest trust in professional journalists** and points out that "there are professional people" in Serbia, but that many are economically pressured and dependent on political structures, which prevents them from working freely.

Regardless of age or affiliation, all focus group participants state that harmful content contributes to a loss of trust in the media and institutions, as well as a sense of saturation and powerlessness. **The biggest concerns relate to political pressures, the inefficiency of REM, the lack of professionalism and economic dependence of newsrooms**, with the increasing appearance of **self-censorship** among journalists. In all groups, the need for **more consistent implementation of existing laws and strengthening media literacy of the audience** was recognised.

- -

"They are, how can I tell you, a weapon with which to poison the people."

"I'm not going to ban... But I'd like to go down to it... The boundaries of some regional television that will be, will have a very limited range."

"In the comments, all people have been given the right and the opportunity to express extremely aggressive views uninvited."

"On November 1, in Novi Sad, some media say 40,000 people, and some say 140,000 people... This is not hate speech, but disinformation."

"Most of them are in social networks because they are not registered in the APR so that anyone can open a social network and write all sorts of things."

"Well, we have REM in principle, but in fact we don't, so... At the end of the day, there is only one person responsible.

"I think that as far as the lack of professionalism is concerned, it is not, because there are a lot of professional journalists, there are professional journalists who are very good journalists, but there is a lack of financial resources and they are forced to do what they do. Then it comes to the fact that they are dependent on someone who pays and everything falls into the water. By the way, when it comes to professionalism, we can't say that there is no professionalism in Serbia. He's got professionalism."

"Who's responsible for this? Censorship and self-censorship. I think that even some journalists who would like to write something that someone would not like, that they censor themselves. No one may even be looking for them. I'm not saying they don't want to, but it might happen. So, maybe that situation will be created. Because, in general, we have become a courtly society where the majority wants to obey, to come to the feet of the emperor. No matter who the Emperor is. From what political orientation. Whether it's left, right, or center. Is it pro-European, pro-Russian, pro-China? Not important at all. The problem is that there is no critical thinking."

16. Recommendations for REM

1. RECOMMENDATIONS FOR REM

1.1. Regulation of the digital environment

It is recommended to strengthen REM's capacity to monitor online media and social networks, aligning practices with European standards and actively participating in initiatives to counter disinformation.

1.2. Fostering media pluralism

Through permits, evaluations and supervision, REM should encourage the diversity of content (informational, documentary, cultural...) and the representation of content intended for different target groups and communities.

1.3. Improve the quality of news content and strengthen professional standards

Given that news programming is among the most watched, REM should encourage a stricter application of standards of accuracy, clarity and separation of news and entertainment formats, in order to increase audience trust and reduce the potential for manipulative content.

1.4. Support the development of documentary, educational and cultural-artistic formats

These content have a stable but underdeveloped audience. Through guidelines and recommendations on quality and public interest, REM can encourage media service providers to increase their coverage and accessibility.

1.5. Encourage more diverse and high-quality entertainment programs

Given that entertainment content arouses great interest among the media audience, and interest in satirical, humorous and educational-entertainment formats is limited by the offer, REM can recommend a greater production of entertainment content that would contribute to media literacy and social dialogue in the public.

1.6. Strengthen the offer of children's programmes and programmes for minors

Low representation and low viewership indicate a lack of quality content. REM should encourage the media to develop educational and creative formats for children, with specific standards for the protection of minors.

1.7. Increase the visibility and accessibility of media content in the languages of national minorities

Given the very low level of coverage of minority media, REM can issue recommendations on improving access, visibility and quality of programs in the languages of national minorities, in particular through digital platforms and public services.

1.8. Strengthening the monitoring of harmful content

There is a need for more systematic and publicly available monitoring of the occurrence of disinformation, propaganda and hate speech in television programs, with clear criteria and regular summary reports.

1.9. More consistent application of sanctions

The findings point to the perception of ineffective application of laws and bylaws when it comes to media control in Serbia. REM should be more consistent in its enforcement of measures against media outlets that repeatedly violate the rules, especially in news programs.

17. Research conclusions

The research shows that Serbia's media landscape is in a period of profound transformation, marked by strong digitalisation, pronounced generational differences, low trust in the media and a wide prevalence of harmful content.

1. Dominant transition to digital sources of information

The internet and social media have become the main news channel for the younger and more educated population, while cable television remains important for the middle generation. Traditional media — primarily terrestrial television, print and radio — are used less and less frequently by the public, with a marked decline in daily newspaper readership.

2. Television still has the largest reach, but in a decreasing trend

Television stations with national coverage remain the most dominant source of information, especially for older, less educated and rural groups of the population. However, young people are almost completely abandoning television and redirecting to Instagram, TikTok, internet portals and YouTube.

3. Trust in the media is low and fragmented

No media outlet enjoys widespread public trust. National television (not only with national coverage, but also cable television) has the most trust and the most distrust at the same time, thus causing a strong polarisation of the public. Digital media is perceived as accessible and fast, but unreliable and flooded with misinformation. Most of the time, citizens trust only the media that they personally follow, while trust in the media system as a whole is undermined.

4. Increasingly, audiences combine multiple sources of information

Three-quarters of citizens use more than one media outlet in parallel to inform themselves. This is due to low trust and the need for verified, balanced information. Younger people use social networks as the primary medium, while the secondary ones are portals; the elderly rely on television stations in general and portals; Minorities are balancing between local sources and networks due to language and infrastructure barriers.

5. Media expectations are high, and the offer is assessed as insufficient

The audience wants a combination of quality informative, entertaining, documentary and cultural-educational program. The problem is that, despite the numerous media in Serbia that are at their disposal, citizens predominantly estimate that a

media that combines the content they want does not exist. Particularly noteworthy is the lack of cultural, educational and children's content, as well as the desire for greater pluralism of opinion and the reduction of tabloidisation. It is important to note that the emphasised demand for cultural, educational and children's content is often a consequence of socially desirable responses of respondents.

6. Harmful media content is highly present and easily recognisable

Citizens believe that propaganda, spin, manipulation and hate speech are present on a daily basis, especially on television with national coverage and in tabloid media. Social networks are recognised as the main space for hate speech and viral misinformation. The perception of harmful content increases with the level of education.

7. REM is perceived as a regulator with limited efficiency

The qualitative findings indicate a widespread belief that REM does not perform its control and supervisory role in accordance with the law, that it does not respond consistently and that it has no real impact on the prevention of harmful content. Citizens' expectations towards the regulator are high, but trust is currently very low.

8. Citizens develop strategies for self-verification of information

Due to the unreliability of the media, the audience is increasingly checking the news through multiple sources — watching video content, comparing portals, reading comments, following foreign media. Younger respondents in particular rely on visual evidence (recordings and live streams), which is also not a guarantee that the information that eventually comes to them will be completely accurate. However, the very awareness of the need to verify media information is a positive step forward.

9. The digital divide is still pronounced

Age, education, and region strongly determine media habits. The young and educated are fully digital, the middle generations are in transition, while the oldest rely almost exclusively on television. Belgrade and Vojvodina are fully digital compared to the south of Serbia and primarily rural areas.

10. The media audience is tired, suspicious and looking for professionalism

In all focus groups, fatigue from an overabundance of information, the need for accurate and clearly presented content, the desire for pluralism and greater accountability of the media and institutions are emphasised. The audience wants less politicisation, less scandal and sensationalism, and more "normal, useful and cultural programming".

This analysis provides a comprehensive insight into the habits, needs and expectations of media service users in the Republic of Serbia, based on a combination of quantitative and qualitative methods. The findings indicate profound changes in the ways citizens access information, particularly as a result of accelerated digitalisation and the growing role of social networks and online platforms, as well as pronounced differences in media habits related to age, level of education and national minority affiliation. In this way, the publication contributes to a better understanding of the plurality of media needs in Serbia and to the strengthening of a human-rights-based approach.

The study was carried out in cooperation with the Regulatory Authority for Electronic Media, in line with its statutory mandate to monitor and protect the interests of media service users, as well as with European standards in the field of freedom of expression and media pluralism. As such, it represents a significant analytical basis for the improvement of public policies, regulatory practices and transparent dialogue between the regulator, media service providers and citizens.

The research was conducted within the framework of the Action "Protecting Freedom of Expression and of the Media in Serbia (PROFREX)", which aims to support beneficiary institutions and civil society organisations in Serbia in advancing reform processes in the field of freedom of expression and media freedom, in line with European standards.

ENG

Co-funded
by the European Union

EUROPEAN UNION

COUNCIL OF EUROPE

CONSEIL DE L'EUROPE

Co-funded and implemented
by the Council of Europe