

# TERMS OF REFERENCE

*Comprehensive Study on the Media Public Needs and Behavior – Demand-side Study*

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## 1. INTRODUCTION

This Terms of Reference (ToR) document is to develop comprehensive study on the needs, attitudes, and behavior of the media public in the Republic of Serbia, including but not limited to various types of consumers' economic and social realities, financial behavior and current and potential interaction with media services.

The Study will be used within the SMS program to inform its programmatic approach to improving (online) media sustainability prospects, including overall organizational sustainability and, specifically, sustainability or viability of particular products and services. Based on the data collected using mixed methods and triangulation and other data validation strategies and on broader set of socio-demographic variables, the Study is to provide recommendations for the SMS partner media actors on the strategies and tactics to:

- Improve institutional capacity to reach and expand target populations with content and services over an extended period of time;
- Identify promising delivery mechanisms for media content with prospects for successful monetization;
- Minimize financial vulnerability; and
- Develop diversified sources of income, institutional and financial support
- Community (audience) building.

The ToR is set out as follows:

- Section 1 deals with the introduction to the document (current section);
- Section 2 deals with the description of the assignment;
- Section 3 deals with the proposal content, submission and selection

### 1.1. Background to the study

#### Context

Currently in Serbia, there is little reliable information on the value of the media market, including the value of specific revenue streams, such as public funding, advertising, etc., but also on the exact number of active media outlets. In addition, reliable information on local media circulation, metrics and revenues is highly limited. Based on the data from Business Register Agency, there are 2,150 media units formally registered, but some media that are active are not registered, while other media that are formally registered are inactive or have ceased to exist. Some estimates indicate that in Serbia there is approximately one registered media per 3.500 citizens.

Only the largest media outlets in Serbia, mostly TV stations, generate the majority of their income from advertising, while smaller and local media depend on public funding or smaller donations. Few outlets, mostly digital, intend to develop alternative revenue streams based on the needs and understanding of their audiences. In all categories of Serbian media, including those with the highest revenue, salaries are by far biggest costs, while investing in media content is not the highest priority.

## Strengthening Media System Project (SMS)

Operating in the aforementioned context, IREX is implementing the USAID-funded SMS project in Serbia in order to improve the regulatory, legislative and economic environment for Serbian media. It aims to support the development of a more enabling legal, regulatory and market environment for media (under Objective 1), as well as support the development of financial sustainability, innovation, and partnership in the Serbia sector (Objective 2).

SMS recognizes that increased audience engagement, in the terms of quality and quantity, is one of the key long-term strategies for financial sustainability of media, as audiences should be the most reliable and measurable capital of media outlets. Utilization of that capital in a wider array of possible digital revenue streams (from ad inventory sales and membership models to crowdfunding) should be the main vehicle for media business development. Thus, the Study should present and analyze data on the expectations and preferences of media audiences in Serbia regarding different types of content, news consumption habits, access and engagement with media content, as well as willingness to pay for specific content and support specific types of media.

### Recent Relevant Research

*Right measure of media*, ASMEDI (2018) – overview of the available data on media and media content from publicly available registers, including the existing methodologies to measure preferences of media public, available at: <http://asmedi.org/misc/PravaMeraMedija.pdf>.

Examples of the research on citizens perceptions (on media, trust towards media, satisfaction, etc.) include:

- *Political Engagement of Serbian Citizens*, CeSID (2017), key results are available at: [http://www.cesid.rs/wp-content/uploads/2017/06/CeSID\\_Politi%C4%8Dki-aktivizam2017.pdf](http://www.cesid.rs/wp-content/uploads/2017/06/CeSID_Politi%C4%8Dki-aktivizam2017.pdf)
- European Broadcasting Union – Trust in Media, EBU (2018), available at: <https://www.ebu.ch/publications/trust-in-media-2018/>

## 2. ASSIGNMENT DESCRIPTION

### 2.1 Purpose, Objectives and Target Groups

SMS will use this research to help local, regional and national media outlets strengthen their editorial and business decisions – both in their day-to-day operations, as well as in their long-term strategic approaches. Findings will be shared with SMS partners and the public – independent media outlets, both national and local, media organizations and CSOs, but also with media buying agencies and businesses.

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The primary beneficiaries of this study are independent media outlets and media organizations in Serbia. As part of the wider media community in Serbia, advertisers and marketers may also use the findings of the study to better understand content consumption habits of local audiences.

SMS aims to use the study's datasets to provide its primary target group with programmatic solutions and tools for improving content quality and monetizing it through various digital means – paywalls, memberships, donations, etc.

Therefore, in summary, the key role of the study is to:

- Provide for comprehensive insight into the public's media consumption patterns, and its underlining causes: a) values, including political affiliations; b) needs and interests, particularly regarding media content; c) motivation and aspirations, with specific emphasis on buying media content; d) financial functioning and attitudes towards different types of payment systems, etc.;
- Provide comprehensive analysis and recommendations to inform the SMS programmatic approach to all aspects media sustainability, as well as to inform organizational and business strategies and tactics of different types of media outlets on the local, regional and national levels.

### 2.2 Scope of Work

- Continuous communication with IREX staff responsible for the research/study development;
- Participation at coordination and consultation meetings and public events organized to collect inputs from relevant stakeholders and present research results and the Study;
- Development of research methodology, including sample (local, regional and national levels), questionnaires, interview guides, etc.
- Development of study outline;
- Implementation of research;
- Development of the report to present collected data stratified per type of media (printed/digital/radio/TV, business model, geographic scope (local, regional, national), etc.;
- Development of final version of the Study in English and Serbian.

## 2.3 Timeline and Deliverables

<b>ACTIVITY</b>	<b>Timeline</b>	<b>DELIVERABLES AND SOURCES OF VERIFICATION</b>
Development of draft research methodology, including sample (local, regional and national levels), questionnaires, interview guides, etc. and submit it to IREX for review and approval	12/3/18 to 12/10/18	Draft methodology, including questionnaires, guides, etc.
Presentation of the methodology to collect inputs from IREX partner organizations for the final version	12/12/18	Presentation concept, PPT, notes from consultations
Development of final version of the methodology, including research instruments based on consultations and comments and submit it to IREX	12/17/18 to 12/21/18	Final methodology, including questionnaires, guides, etc.
Development of study outline and submit it to IREX for review and approval	12/17/18 to 12/21/18	Study outline
Implementation of research	12/26/18 to 3/15/19	Recordings and transcripts of the interviews, raw data
Development of the report to present collected data and submit it to IREX for review and approval	3/15/19 to 3/22/19	Report to present collected data
Development of draft version of the Study and submit it to IREX for review and approval	4/1/19 to 4/26/19	Draft version of the Study in English
Development of the final version of the Study based on comments and suggestions	5/6/19 to 5/10/19	Final version of the Study in English and Serbian
Participate at public presentation of the study	5/15/19 to 5/31/19	Presentation concept, PPT

### 3. PROPOSAL CONTENT, SUBMISSION AND SELECTION

1. Portfolio of the organization/agency/consortia;
2. CV of the expert(s) involved, emphasizing relevant experience and detailed description of roles and responsibilities for this assignment;
3. Statement reflecting the applicant's understanding of the assignment;
4. Samples of relevant similar assignments with three references;
5. A clear description of the proposed methodological approach, including proposal for sampling, data collection methods, etc.

All proposals must be submitted no later than 5pm on Monday, 26 November 2018 in electronic form to the email [smstenders@irex.org](mailto:smstenders@irex.org) with the subject line: "Demand-side Study – (applicant/ organization/agency/consortia)". Only shortlisted applicants will be informed about the selection process no later than Friday, 30 November 2018.

Selection will be made no later than Friday, 30 November 2018. IREX will make a decision on the selection of the successful bidder, subject to the available budget, on the following criteria:

- Relevance and comprehensiveness of the proposed methodology
- Relevance and quality of the submitted samples
- Cost-effectiveness of the proposal
- Relevance of the previous experience
- Effectiveness of the proposed division of labor between the team members

IREX may at its discretion ask for additional information.

Issuing this Terms of reference does not commit IREX or the USAID Strengthening Media Systems Project to select any proposal.