

Executive summary:

K O S O V O



Key Country Facts

Population	1,739,825 (2011 census)
% of unemployed	25.3 %
Net income per person (average) EUR	364 EUR
Number of local communities (municipalities/cities)	38
Number of local media	97 + <10 online local media
Annual advertising revenue in media sector	There is no available data.

Context

Number: There are 16 TV channels with local terrestrial frequencies, and 81 radios with local frequencies. There are no local print media, while the the exact number of online media with local content is unknown.

Problems: Lack of financial resources has been the main challenge for most local media since their establishment. The second challenge of local media is keeping up with the technology. Lack of market research in Kosovo also affects their long-term planning. Kosovo continues to suffer from a lack of market research, which would help identify audience trends and patterns. The lack of expertise and knowledge of most local media to compete for available grants that aim media development.

Sources of funding: Apart of advertising, which is the main source of income (local media usually target retail companies, hotels, restaurants, petrol companies and private bank), the second important source of income for local media represent donors' funds. Some local media are also registered as non-governmental organization, hence being eligible to apply for grants available for the development of civil society in Kosovo. The last source of funding comes from local governments.

Supply side

Mission: The primary mission of local media is to be informative media of local content. Local content is not restricted to the town events only. Its coverage includes news and events in the surrounding areas as well.

Capacities: The number of employees in local media varies from 2 to 16 (the highest number employed by local TV stations); Considering that some of them have nearly 20 years of experience in local media, their journalistic skills have largely increased. This is also the result of trainings they have undergone. Their skills on technology and IT are adequate too, although it must be said that their technology is relatively old and out-of-date.

Content: In the main news show, which is typically aired in the evening hours, the percentage of own contribution varies from one media to another. While local TV stations produce between 60-70% of their own production, online portals have less portion of it in their content. Local news receives the highest share of news programming. Within local news, local politics are the dominant stories, followed by social, eco-

conomic, culture and sports stories. In addition to local news, national news is quite present in local media. Overall copy-rights are not respected.

Business models: Annual budgets of media varies from 17.500 EUR to 135.000 EUR, TV outlets have the biggest budgets. In the majority of media, the main income comes from advertising and production. Production includes graphic design and video materials for private individuals and companies. Other funding sources include the local authorities, such as the case with TV Tema and TV Besa who have sign an agreement with local authorities to broadcast live the assembly meetings.

Interaction with audience: The only mechanism media use to interact with the audience is through social media. Most of local media are present on social media, especially Facebook and YouTube. The only way they gather audience data is through online platforms. They have their own data only with regard to the number of followers, video views, page views as well as 'likes' and 'shares'. No local media uses audience metrics.

Demand side

Key observations: Audience in the biggest local communities in Kosovo considers that local media are losing prominence due to cable providers. As result, most of audience have reduced their viewership of local TV to evening news only. Local TV channels are the most trusted among local media. This is the reason why local companies still prefer local TVs to advertise. The level of citizens trust in online media is very low, with the exception of those online media that are an extension of a TV or Radio channel. Finally, citizens believe that local authorities have constantly tried to control local media by giving them grants or buying advertisement space on them.

Key problems of local media: Citizens believe that three key problems they face are financial instability, technological demands and professional staff. The majority of local media in Kosovo operate on small budgets and their level of income has declined as advertisers prefer national or online media. Only a few local televisions are broadcasting with the HD resolution. The majority of televisions operate with old or out-of-date technology. Of the current staff, most are engaged in journalistic tasks. Although most local media have personnel with good IT skills, most of them lack skilled staff in business management and marketing.

Key shortcomings of local media: Lack of own production. In their main news hour, in average one or two news story are produced by the local media, while the rest of news stories are borrowed from news agencies. Another shortcoming relates to insufficient coverage of local topics. Local media mostly report on daily activities of local authorities, hence rarely engaging themselves into investigative journalism. Finally, financial dependence from local authorities would make the third among top shortcoming of local media operation.

Main trends and habits: 53% of respondents choose local media outlets they use because they provide information about local events. The second most rated reason (21%) is because they offer timely information. One reason for the lack of trust on online media is the presence of fake news. Unlike radio and televisions, most online media with local content lack proper ownership and editorial transparency. Our research shows that in average citizens spend 57.5 minutes per day consuming online media, higher than local television (30 minutes) and radio (8.43 minutes). Although there are no local newspapers in Kosovo, national newspapers are sold in every municipality. Among those who read newspaper, their preferred daily is "Koha Ditore".

Preferences: Asked about what they would like to learn more than is currently missing from local web sites, 31% of our respondents said investigative stories, followed by education and sports (each 13%) as well as art and culture (6%).