Media Consumption Survey UKRAINE 2016

AUGUST 2016

NATIONAL SURVEY

CONTENTS

OBJECTIVES

- To define attitude of general public to MEDIA
- To measure level of satisfaction with regional, national and Russian media of all types
- To evaluate preferences regarding different MEDIA types
- To evaluate consumption level of different MEDIA types
- To evaluate level of trust in different MEDIA types
- Estimation of media literacy of the population

RESEARCH DESIGN

Method

F2F

Target audience

Male/Female 18-65

Fieldwork

Wave 2015: May – June
Wave 2016: May – June

Sample size
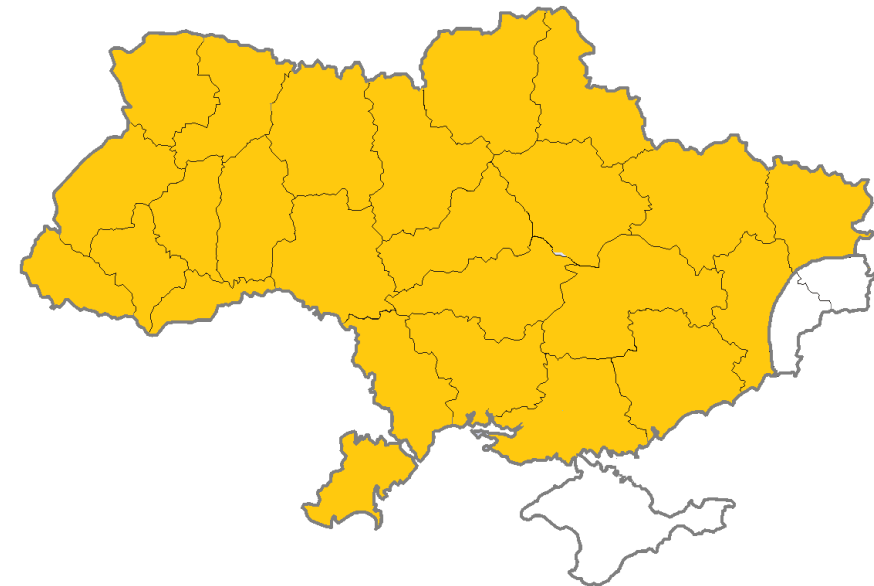
Representative part ~ 1640 interviews/wave

Total sample - 4048 interviews/wave, of which

300 interviews in each of 12 regions: Kyiv, Vinnytsia, Dnipro, Donetsk, Zaporizhzhia, Lviv, Mykolayiv, Odesa, Poltava, Sumy, Kharkiv, Kherson

Geography

Ukraine, cities 50K+
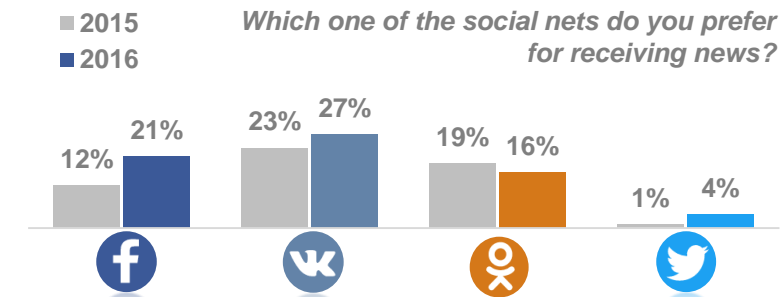
Crimea and NGCA area are excluded

Key results (1)

MEDIA USAGE

Internet use, including news sites and social networks, is on the increase, while consumption of traditional media (television, press, radio) has diminished.

Despite the dynamic development of online media, TV remains the #1 source for getting news. TV keeps its leadership due to its hold on an older audience (35+).The top 3 TV channels are 1+1, Inter and STB.

Radio and newspapers continue their decline; the younger the audience is, the less relevant are these sources.

■ 2015
■ 2016

Which media have you used during last 30 days as a source of news?

85% 82%
64% 67%
35% 28%
31% 23%

TV | Internet (websites,social nets) | Radio | Press

As news consumption on the internet grows in Ukraine, consumers under 35 are increasingly getting their news not from news websites, but from news aggregators (like ukr.net) and social networks. The audience for Facebook has grown dramatically over the past year.

■ 2015
■ 2016

Which one of the social nets do you prefer for receiving news?

12% 21%
23% 27%
19% 16%
1% 4%

TRUST TO MEDIA

Not only has use of internet for news grown, but trust in internet media has grown as well (both regional and national).

Television retains the highest level of trust.

The population in general declares trust only in Ukrainian news sources. The level of trust in Russian internet media is low, has dropped dramatically since 2014, and is used mainly by people in the East and South.
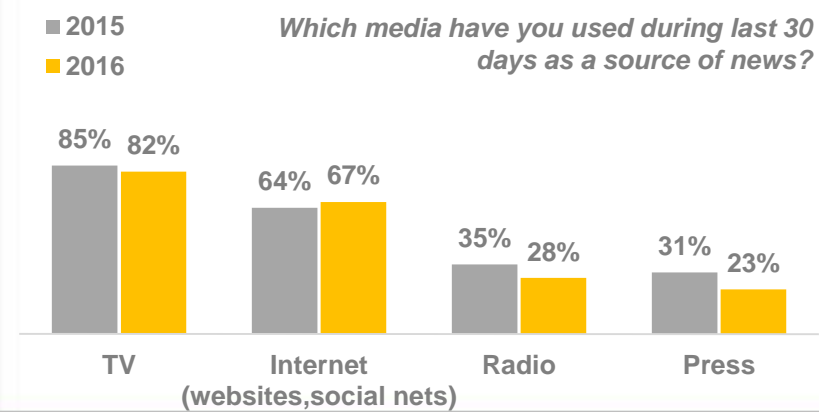
How much do you trust news on…?
(share of those, who completely or partly trust)

	2015	2016
Trust to National media		
TV	61%	58%
Internet	47%	52%
Press	34%	31%
Radio	39%	36%
Trust to Regional media		
TV	51%	52%
Internet	40%	45%
Press	36%	33%
Radio	35%	32%
Trust to Russian media		
TV	4%	3%
Internet	8%	7%
Press	3%	2%
Radio	3%	2%

Key results (2)

With the exception of newspapers, respondents prefer national to regional media. The audience for Russian media continues to decline.

TELEVISION AUDIENCE

Which TV channels' news have you watched during the last 30 days? (among TV audience)

TV consumption	2015	2016
National	99%	99%
Regional	43%	44%
Russian	12%	7%

National TV: In all regions, over 95% of consumers watch national channels.

Regional TV: Largest share is in Dnipro (70%), Lviv (66%), Odesa (63%) regions; smallest – in Poltava (15%) and Luhansk (30%) regions.

Russian TV: The steepest drop in viewership is in Sumy, Dnipro and Kherson regions. Russian TV remains more popular in Ukraine's eastern region (~10-12%).

INTERNET MEDIA AUDIENCE

Which Internet websites' news have you consumed during the last 30 days? (among Internet media audience)

Internet consumption	2015	2016
National	93%	91%
Regional	28%	31%
Russian	25%	14%

National Internet media: The lowest consumption of national web resources remains in Donetsk region – 72%.

Regional Internet media: They are most popular in Donetsk (76%), Mykolayiv (76%), Odesa (58%) regions. The lowest consumption remains in Poltava region (8%).

Russian Internet media: Steepest audience decrease is observed in Dnipro, Kherson and Kyiv regions. Currently most users of Russian websites are in the East and South (~20%).

PRESS AUDIENCE

Which Press news have you accessed during the last 30 days? (among Press readers)

Press consumption	2015	2016
National	61%	55%
Regional	63%	70%
Russian	7%	3%

National Press: Average level of national press consumption has decreased.

Regional Press: Among press consumers, majority prefer regional sources, and this trend is growing.

Russian Press: is not widespread.

RADIO AUDIENCE

What Radio news have you listened to during the last 30 days? (among Radio audience)

Radio consumption	2015	2016
National	87%	90%
Regional	27%	28%
Russian	11%	4%

National radio stations are most popular. Local stations are most popular in Lviv (71%) and Odesa (49%) regions. Russian stations are insignificant.
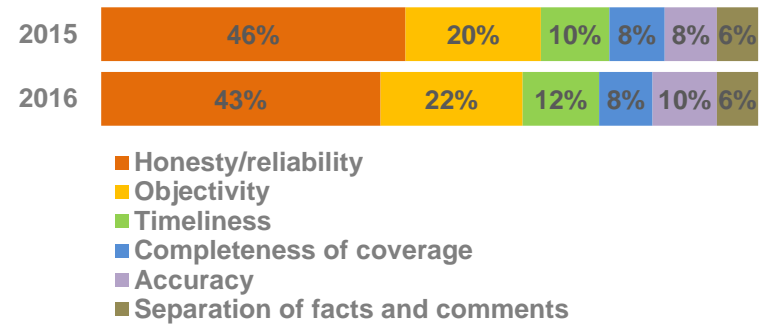
Key results (3)

MEDIA COMPETENCE

Key demands from news sources remain the same as last year, mainly honesty and reliability.

Which demands should be satisfied by news in general?
(The most important is shown)

	Honesty/reliability	Objectivity	Timeliness	Completeness of coverage	Accuracy	Separation of facts and comments
2015	46%	20%	10%	8%	8%	6%
2016	43%	22%	12%	8%	10%	6%

- ■ **Honesty/reliability**
- ■ **Objectivity**
- ■ **Timeliness**
- ■ **Completeness of coverage**
- ■ **Accuracy**
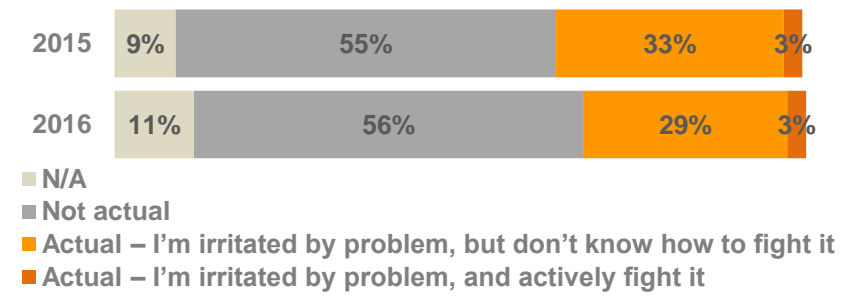- ■ **Separation of facts and comments**

The majority of respondents declare that they are able to define trustworthy information in one way or another. Same as before, reliability is connected with the source of the news or with an impression of well-balanced points of view in news coverage. The share of those who trust all of their favorite media has grown over the past year (from 24% to 28%). This increase was observed in Sumy, Mykolayiv, Dnipro, Kharkiv, Donetsk and Luhansk regions.

Are you aware of a possible appearance of paid publications/hidden advertisement (jeansa) in the guise of ordinary content in the media?

	2015	2016
Yes, I'm aware	49%	55%

- ■ 2015
- ■ 2016
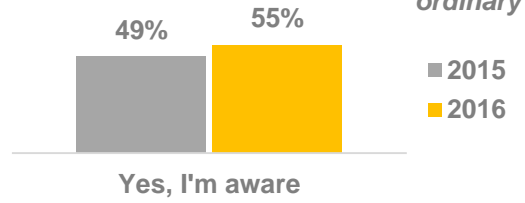
The share of people who are aware of *jeansa's* existence has grown over the past year. At the same time, the number of respondents who can distinguish such content from real news has decreased (from 57% to 47%); this reduction is observed in Kyiv, Dnipro and Donetsk regions.
Less than a half of those surveyed consider *jeansa* to be an actual problem, and the majority of those surveyed say they can tolerate the presence of *jeansa*.
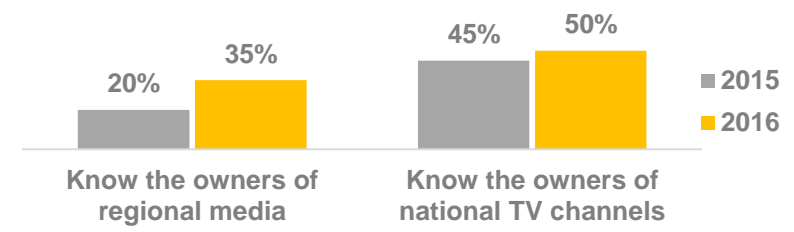
How actual is the problem of paid/jeansa materials in media for you?

	N/A	Not actual	Actual – I'm irritated by problem, but don't know how to fight it	Actual – I'm irritated by problem, and actively fight it
2015	9%	55%	33%	3%
2016	11%	56%	29%	3%

- ■ N/A
- ■ Not actual
- ■ Actual – I'm irritated by problem, but don't know how to fight it
- ■ Actual – I'm irritated by problem, and actively fight it

TV is permanently perceived as the main source of paid material. Those who claim the ability to distinguish *jeansa* have most often seen it on Russian channels.

The perceived importance of knowing who owns the media has not changed over the past year (38%), but the share of those claiming awareness of local/national media owners has grown. Growth is observed in almost all regions.

Do you know who owns your media?

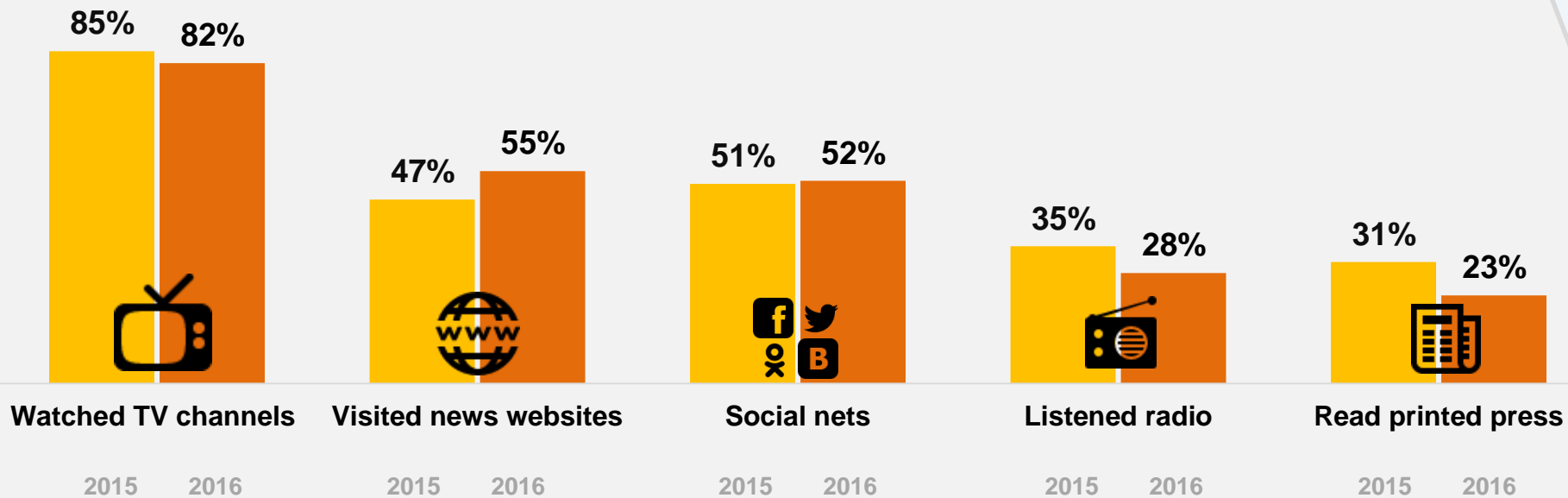|	Know the owners of regional media	Know the owners of national TV channels
2015	20%	45%
2016	35%	50%

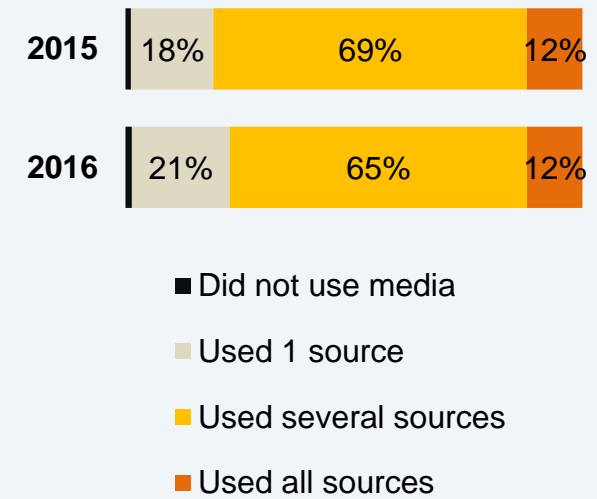- ■ 2015
- ■ 2016

MEDIA CONSUMPTION

Media activity

News websites remain the most dynamically developing media – their audience has grown by 8% over the year. Over a year, share of those getting news from the internet (news sites and social media) has increased from 64% to 67%. Popularity of internet media is the highest among the younger audience. Television is gradually losing its audience, but remains the most popular source of information for Ukrainians (mainly because of the older audience). Popularity of radio and newspaper news declined further this past year.

Media activity during one month 2015-2016

	2015	2016
Watched TV channels	85%	82%
Visited news websites	47%	55%
Social nets	51%	52%
Listened radio	35%	28%
Read printed press	31%	23%

Only **1%** of the population claim they do not use media to receive news

	Did not use media	Used 1 source	Used several sources	Used all sources
2015		18%	69%	12%
2016		21%	65%	12%

- Did not use media
- Used 1 source
- Used several sources
- Used all sources

Media types:
Regional VS National VS Russian

With the exception of newspapers, respondents prefer national media.
The share of the regional press consumption grew among the consumers of print media, particularly in Sumy, Dnipro, Kharkiv, Luhansk, Kherson. regions.

Which media's news have you consumed during the last 30 days? 2015-2016

Consumption by type	TV	Websites	Radio	Press
Regional 2015	43%	28%	27%	63%
Regional 2016	44%	31%	29%	72%
National 2015	99%	93%	87%	61%
National 2016	99%	91%	90%	55%
Russian 2015	12%	25%	11%	7%
Russian 2016	7%	14%	4%	3%
	2015, N=1404 (85% of all TA)	2015, N=777 (47% of all TA)	2015, N=579 (35% of all TA)	2015, N=513 (31% of all TA)
	2016, N=1350 (82% of all TA)	2016, N=895 (55% of all TA)	2016, N=465 (28% of all TA)	2016, N=371 (23% of all TA)

Question: *Look at the card and say which TV channels' NEWS have you watched during last 30 days?*
(FOR INTERNET, PRESS, RADIO – ANALOGOUS QUESTION) **Base:** *Consumers of respective media*

10

Weekly usage of various media

Russian media are practically abandoned by the national population. Over the past year their audience dwindled even more - the sharpest decline was in in Sumy, Dnipro and Kherson regions.

Weekly usage of media for getting news 2015-2016

	national tv	national internet	national radio	national press	russian tv	russian internet	russian radio	russian press
2015	83%	44%	31%	25%	10%	12%	3%	2%
2016	80%	52%	27%	19%	5%	10%	2%	1%
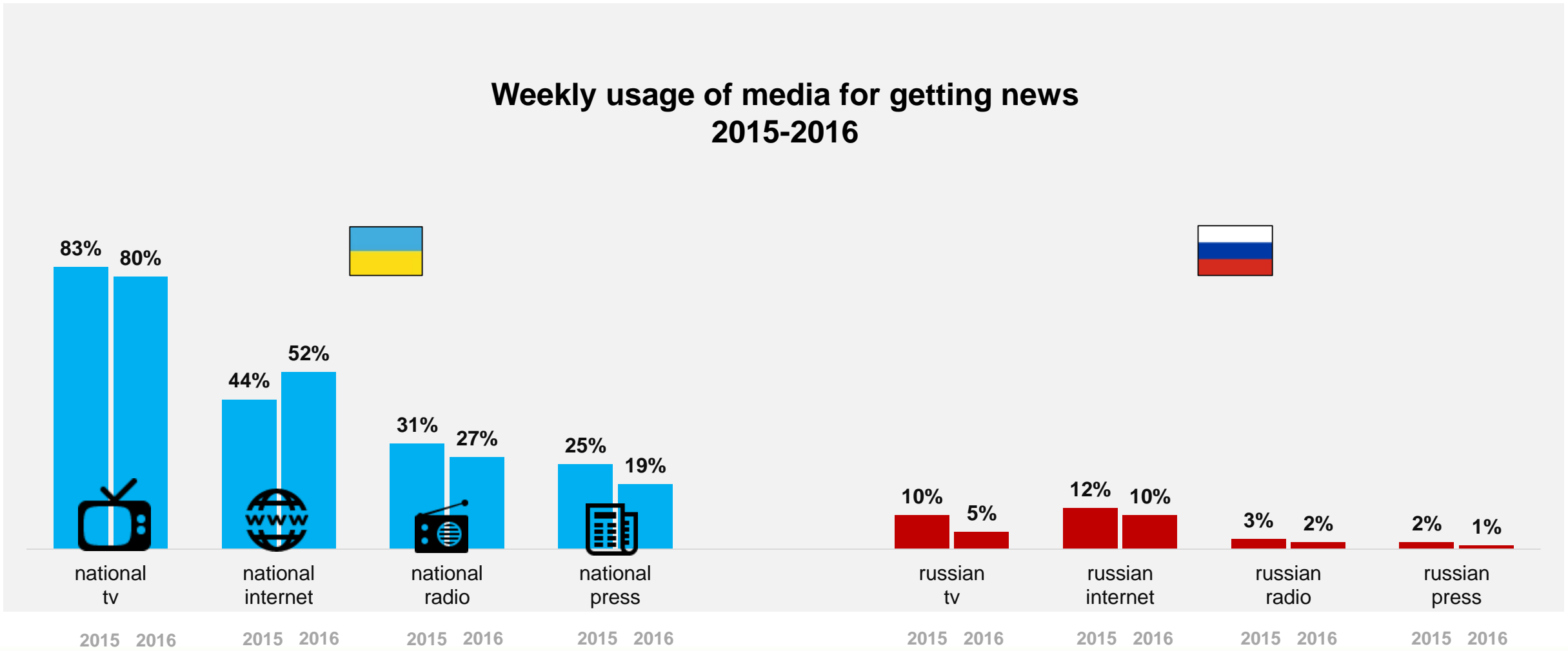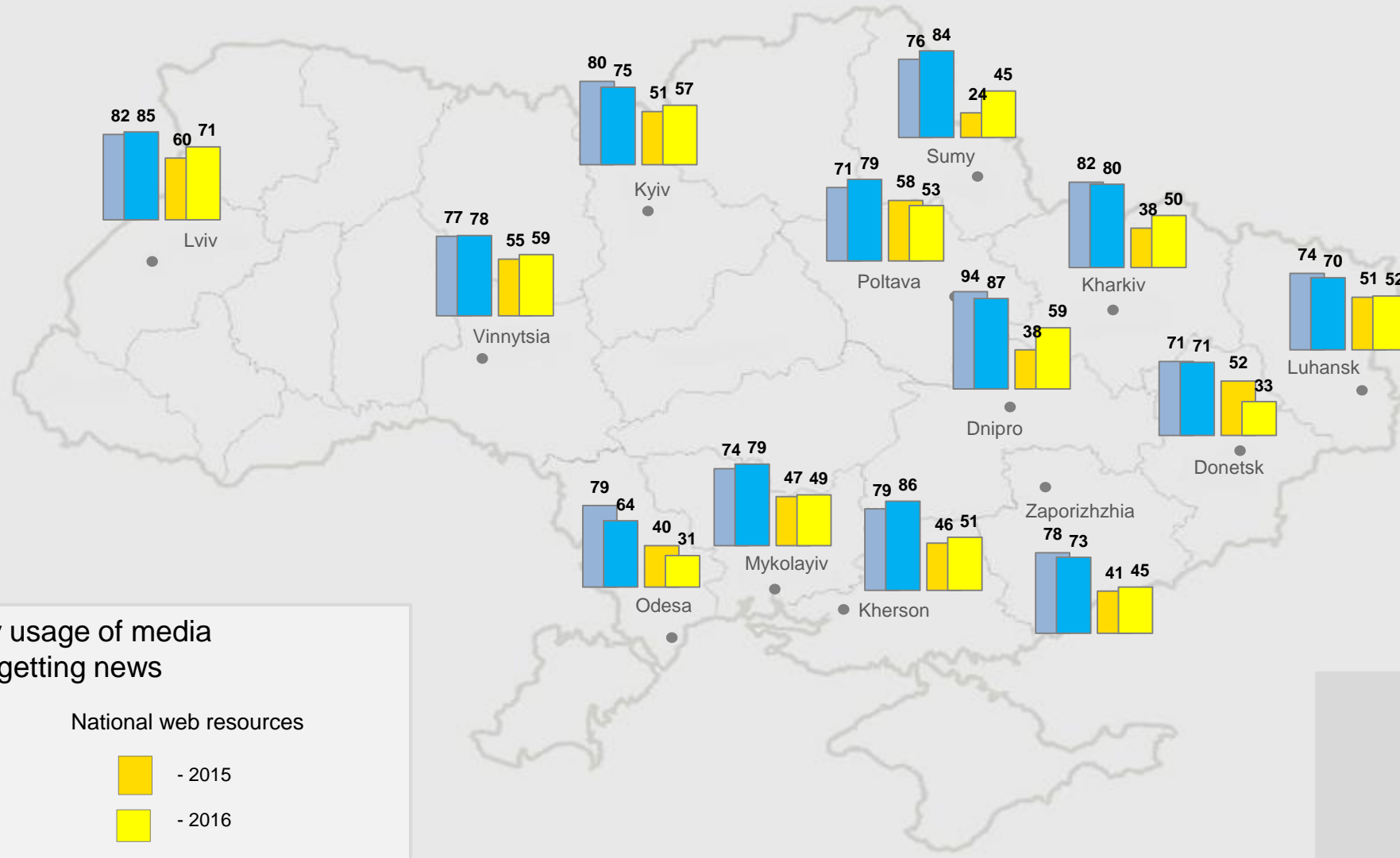
Weekly usage of Russian media
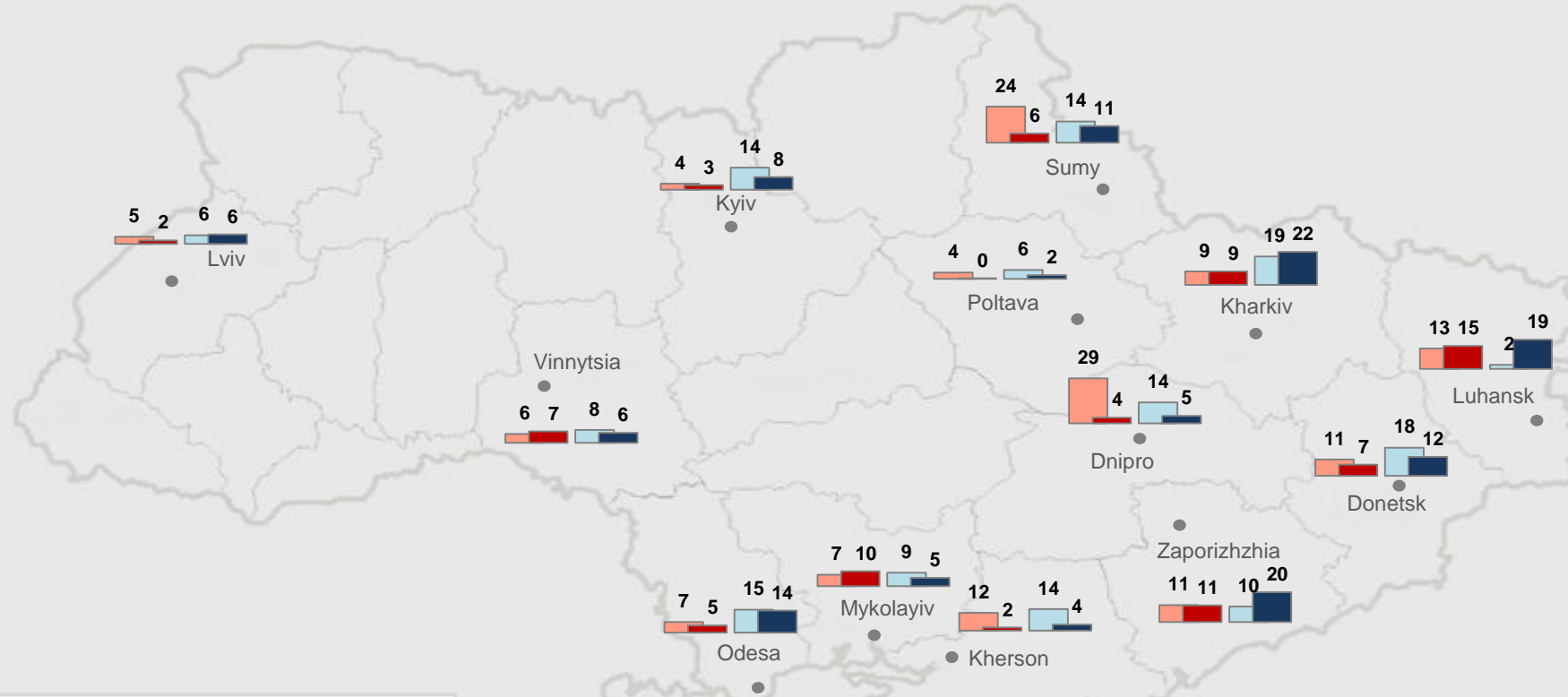
Sumy — 24 6 14 11

Kyiv — 4 3 14 8

Lviv — 5 2 6 6

Poltava — 4 0 6 2

Kharkiv — 9 9 19 22

Luhansk — 13 15 2 19

Dnipro — 29 4 14 5

Donetsk — 11 7 18 12

Vinnytsia — 6 7 8 6

Mykolayiv — 7 10 9 5

Zaporizhzhia

Kherson — 12 2 14 4

— 11 11 10 20

Odesa — 7 5 15 14

Weekly usage of media for getting news

Russian TV
- 2015
- 2016

Russian web resources
- 2015
- 2016

National index

TV — 10 5

Web resources — 12 10

13
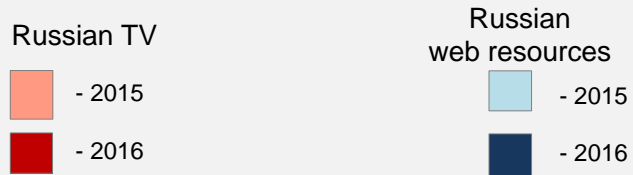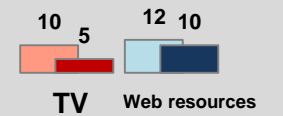
Level of satisfaction with news presentation on TV

Russian television not only lost audience, it also lost the trust of those continuing to watch it. Only 26% of the Russian news audience regard the info presented to be objective and reliable.
TV viewers in general are satisfied with the immediacy and frequency of news broadcasts, but the news content remains a weakness. Just slightly more than half of the audience of Ukrainian TV channels thinks national/regional channels give full, objective and reliable information. Regional TV viewers feel the news they are provided is "less important" than in the previous year (respondents in the East were most critical).

Satisfaction with news presentation on TV

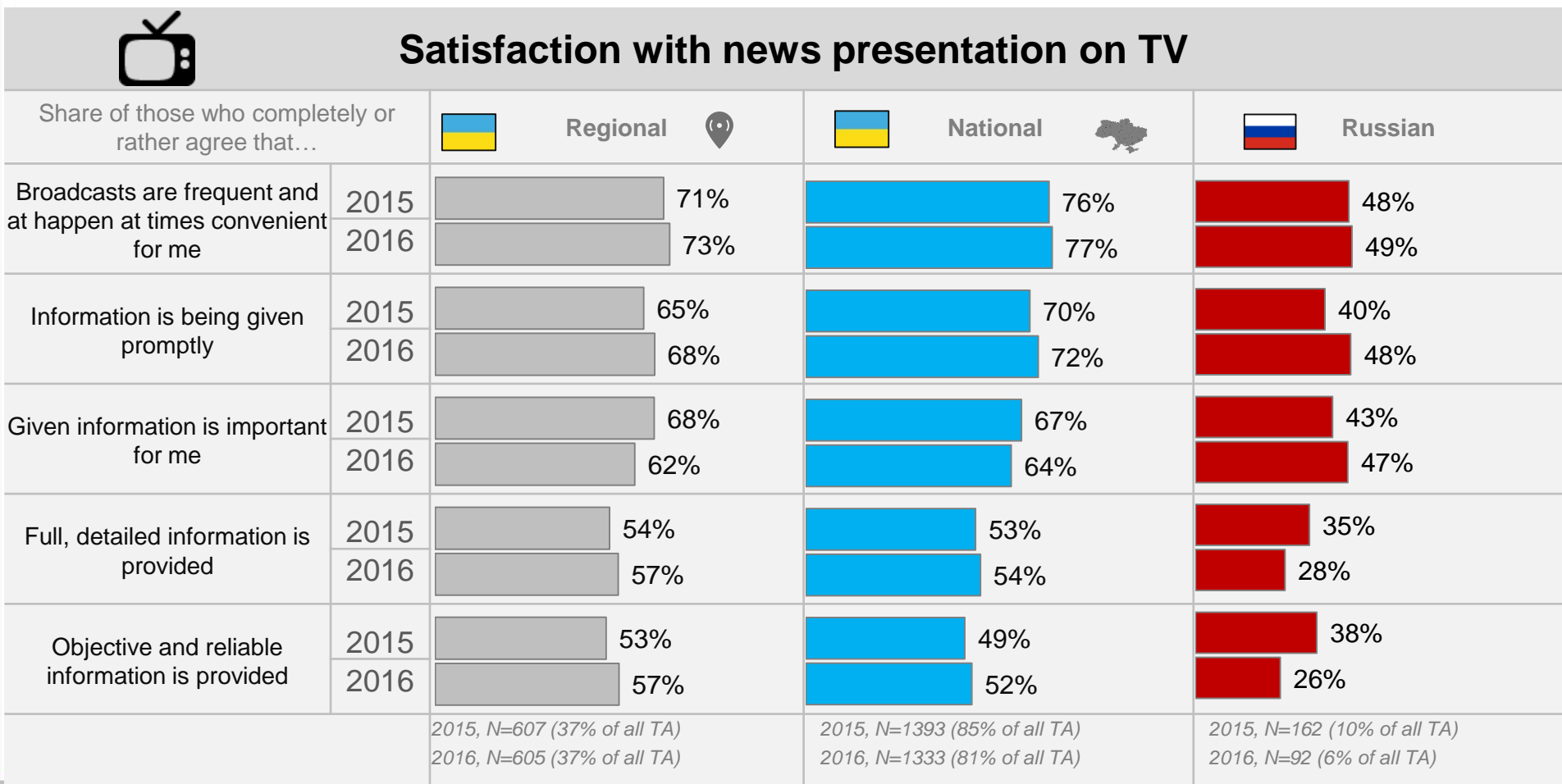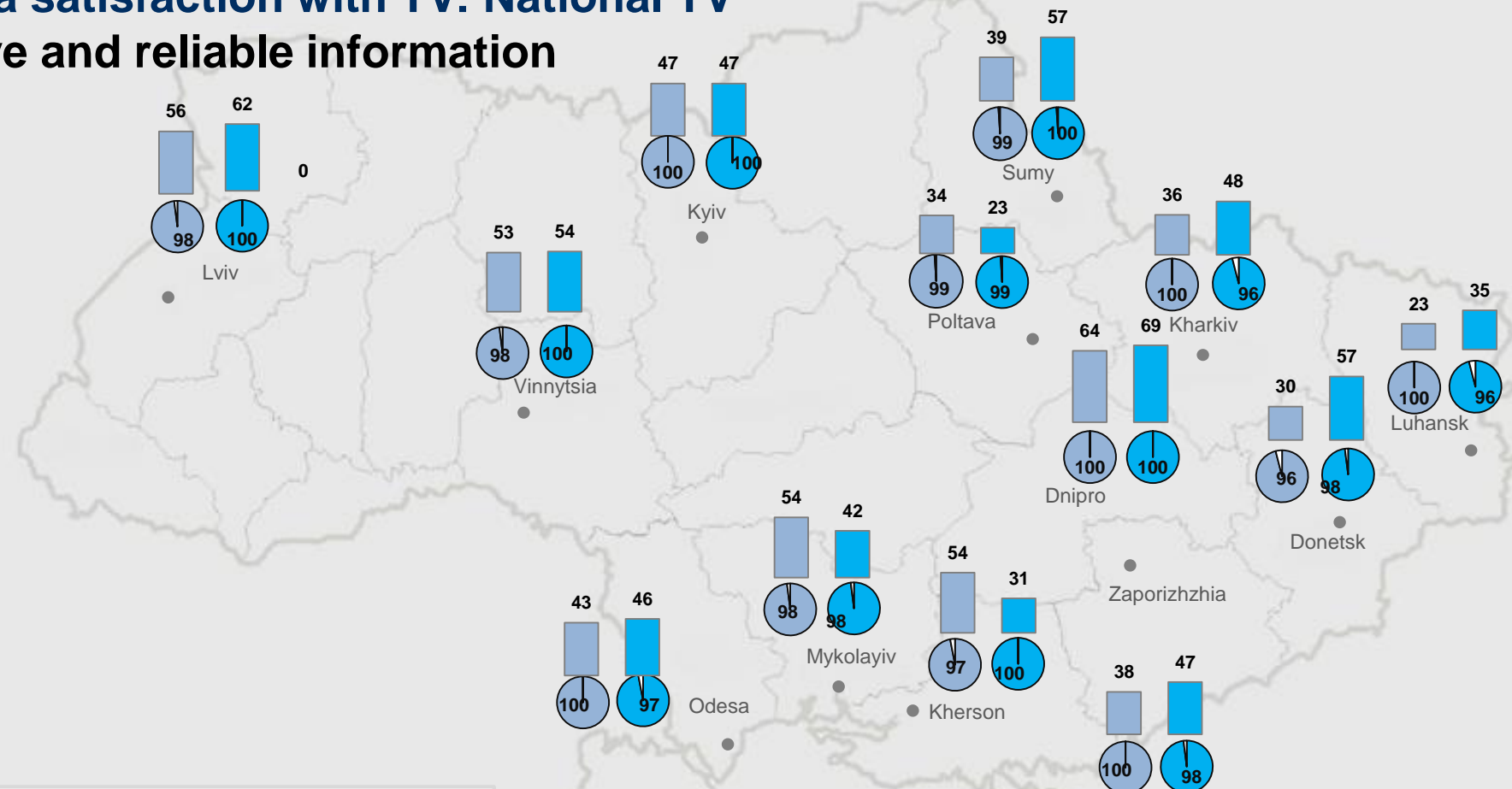| Share of those who completely or rather agree that…		Regional		National		Russian
Broadcasts are frequent and at happen at times convenient for me	2015	71%		76%		48%
	2016	73%		77%		49%
Information is being given promptly	2015	65%		70%		40%
	2016	68%		72%		48%
Given information is important for me	2015	68%		67%		43%
	2016	62%		64%		47%
Full, detailed information is provided	2015	54%		53%		35%
	2016	57%		54%		28%
Objective and reliable information is provided	2015	53%		49%		38%
	2016	57%		52%		26%
		2015, N=607 (37% of all TA)		*2015, N=1393 (85% of all TA)*		*2015, N=162 (10% of all TA)*
		2016, N=605 (37% of all TA)		*2016, N=1333 (81% of all TA)*		*2016, N=92 (6% of all TA)*

Question: *Please evaluate how much you agree with following statements about NEWS…*

Base: *Consumers of respective media*

Level of media satisfaction with TV: National TV gives objective and reliable information
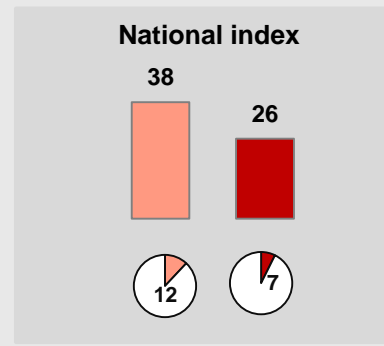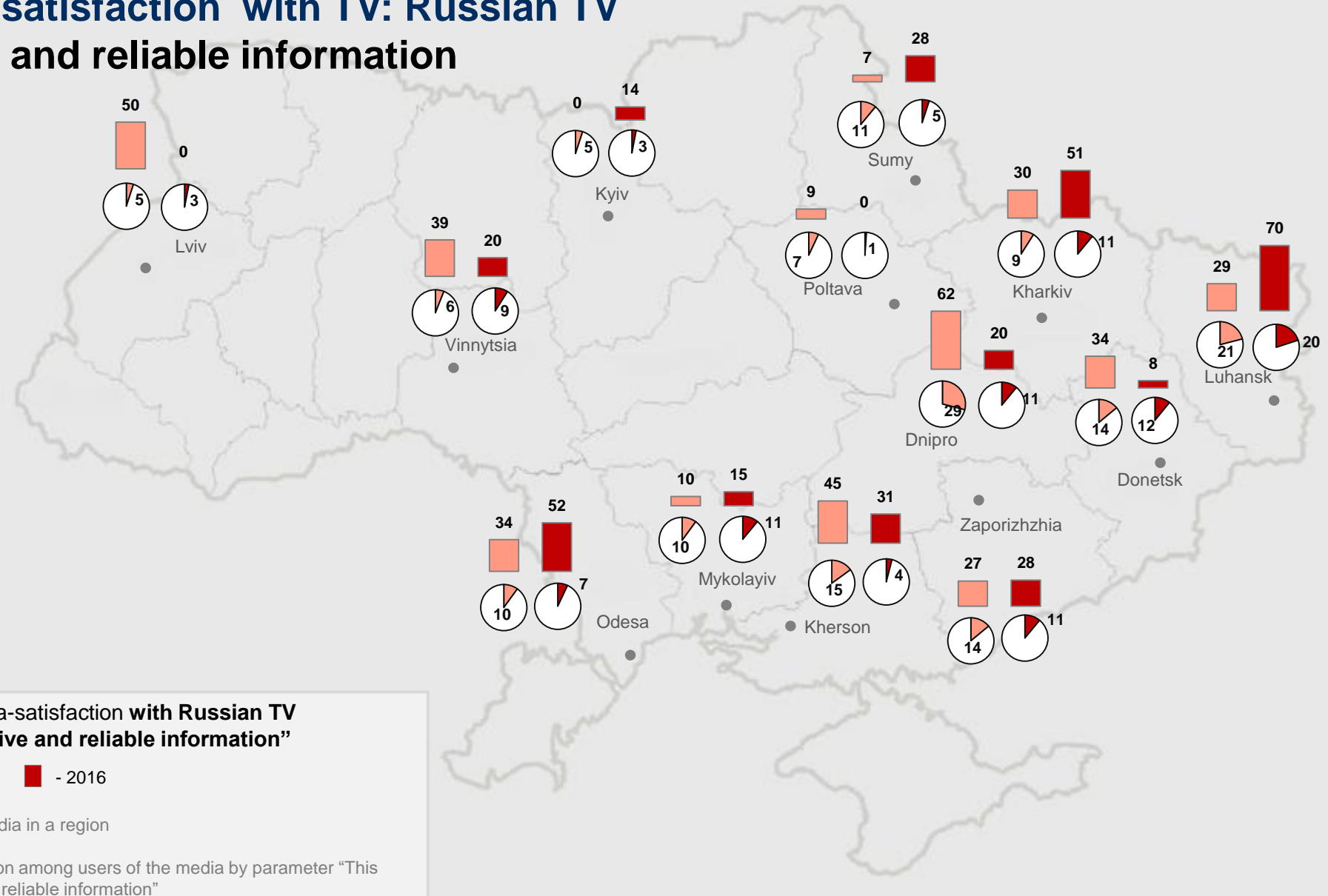
Level of satisfaction with news on the internet

Respondents said the information they get from websites is more complete and objective than what they see on Ukrainian television.
Reliability-wise, Russian internet media are on a level with Russian TV – not trusted.
Noteworthy is the decline in respondents who feel national web media provide important information - the largest decrease is in Kyiv, Poltava and Mykolayiv regions.

Satisfaction with news presentation on the web

Share of those who completely or rather agree that…		Regional		National		Russian
Convenient to use	2015	87%		88%		65%
	2016	81%		86%		74%
Easy to find information I need	2015	81%		82%		59%
	2016	80%		81%		63%
Information is being given promptly	2015	78%		80%		55%
	2016	73%		82%		61%
Given information is important for me	2015	74%		76%		48%
	2016	70%		71%		41%
Given is full, detailed information	2015	63%		68%		37%
	2016	60%		70%		32%
Give objective and reliable information	2015	63%		65%		31%
	2016	65%		65%		22%
		2015, N=218 (13% of all TA)		*2015, N=722 (44% of all TA)*		*2015, N=197 (12% of all TA)*
		2016, N=278 (17% of all TA)		*2016, N=812 (50% of all TA)*		*2016, N=122 (7% of all TA)*

Question: *Please evaluate how much you agree with following statements about NEWS…*   **Base:**   *Consumers of respective media*

Level of media satisfaction with web media: National internet media gives objective and reliable information

USAID | U-Media Project — Internews

Lviv: 75, 72 — 93, 92
Vinnytsia: 62, 60 — 91, 89
Kyiv: 68, 64 — 99, 95
Poltava: 35, 33 — 95, 97
Sumy: 49, 59 — 84, 89
Kharkiv: 72, 55 — 98, 90
Luhansk: 66, 68 — 99, 78
Dnipro: 78, 86 — 91, 98
Donetsk: 43, 55 — 70, 72
Mykolaiv: 75, 68 — 86, 77
Odesa: 60, 72 — 88, 84
Kherson: 63, 66 — 85, 98
Zaporizhzhia: 53, 71 — 93, 94
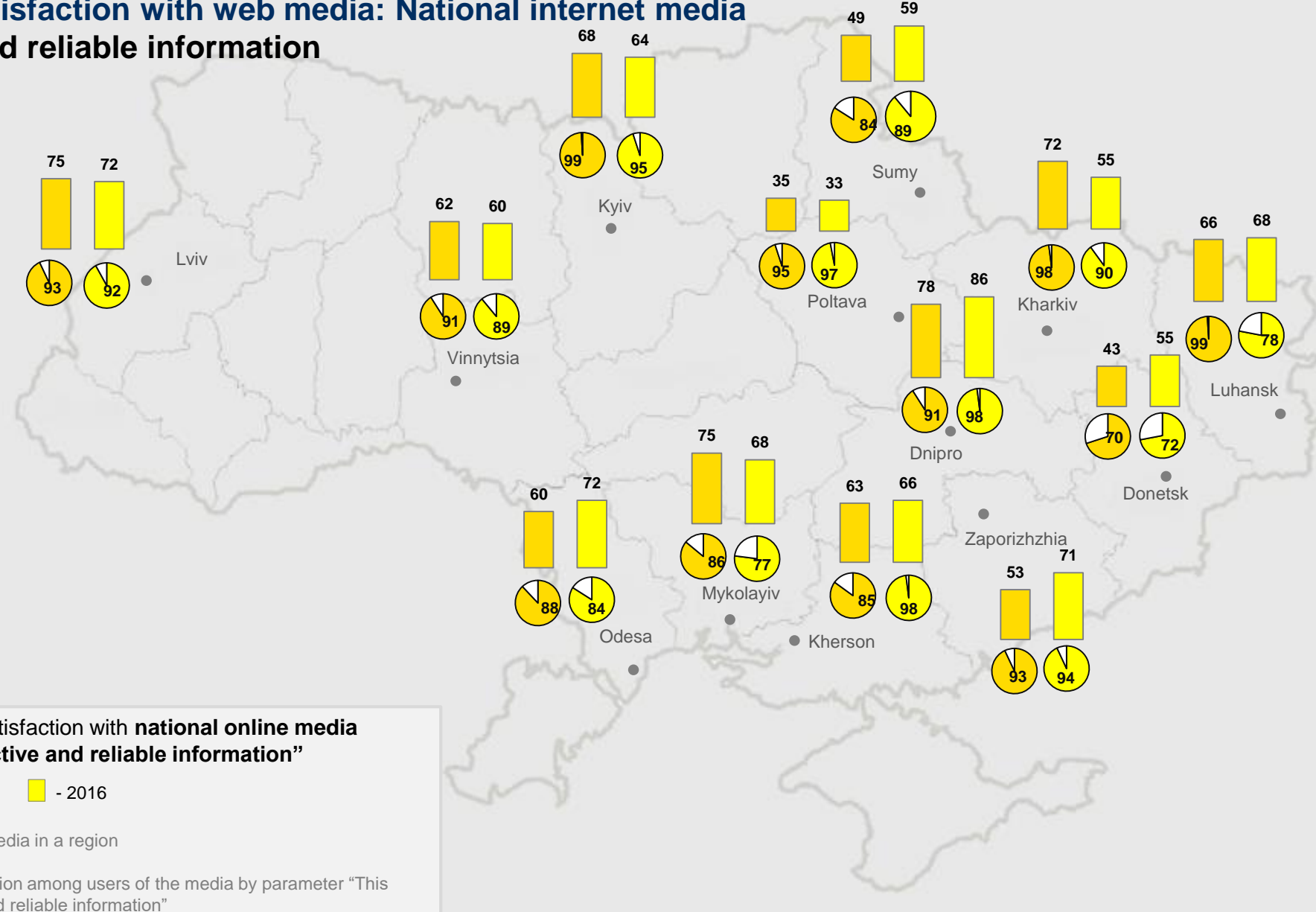
Level of media satisfaction with **national online media "Give objective and reliable information"**

- 2015
- 2016

- Share of users of the media in a region

- Level of media-satisfaction among users of the media by parameter "This media gives objective and reliable information"

National index
65, 65 — 93, 91

Level of media satisfaction with web media: Russian internet media gives objective and reliable information

Lviv

Vinnytsia

Kyiv

Sumy

Poltava

Kharkiv

Luhansk

Mykolayiv

Dnipro

Donetsk

Zaporizhzhia

Odesa

Kherson

Level of media satisfaction with Russian online media "Give objective and reliable information"

☐ - 2015   ■ - 2016

◔ - Share of users of the media in a region

☐ - Level of media-satisfaction among users of the media by parameter "This media gives objective and reliable information"
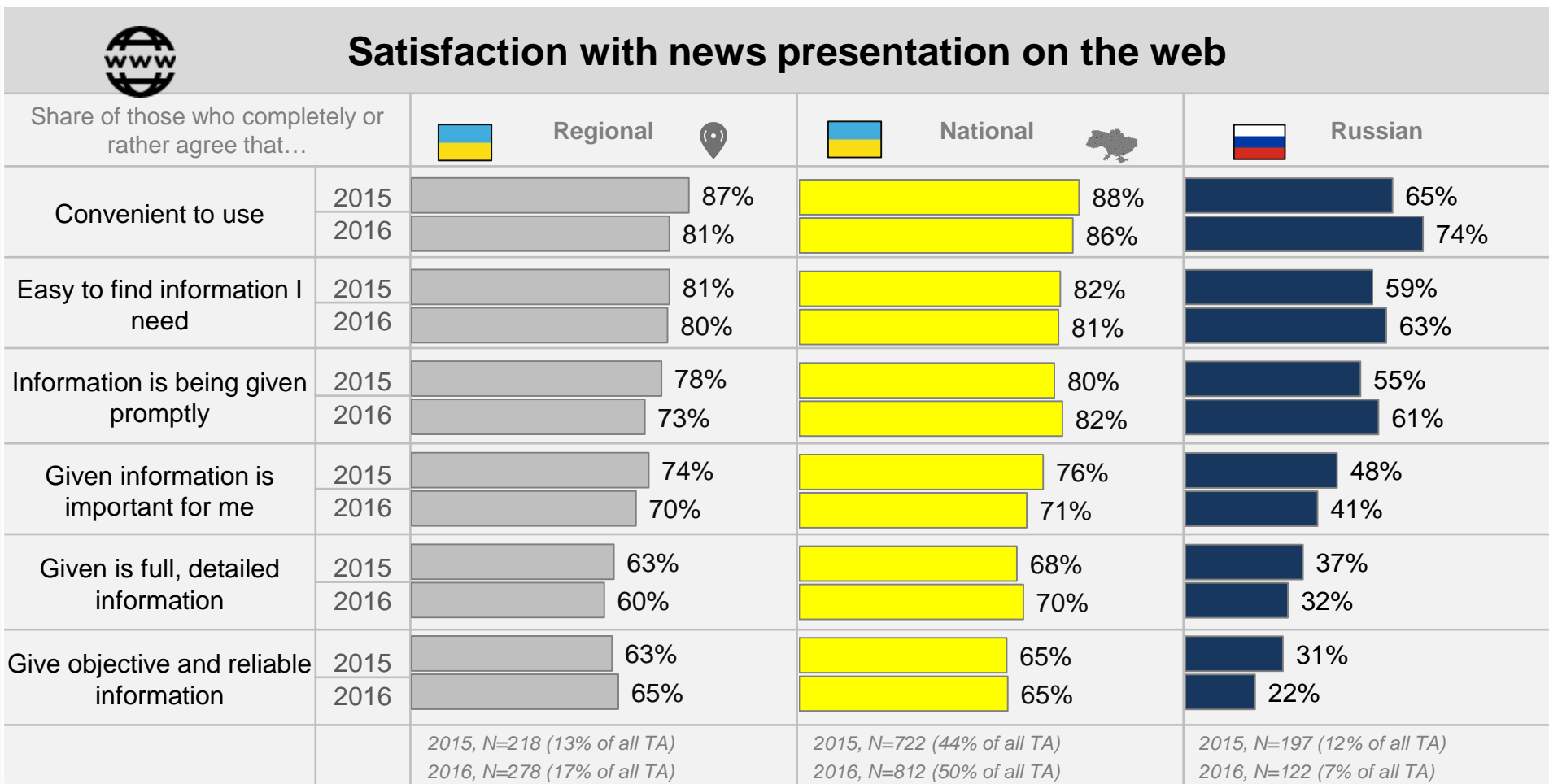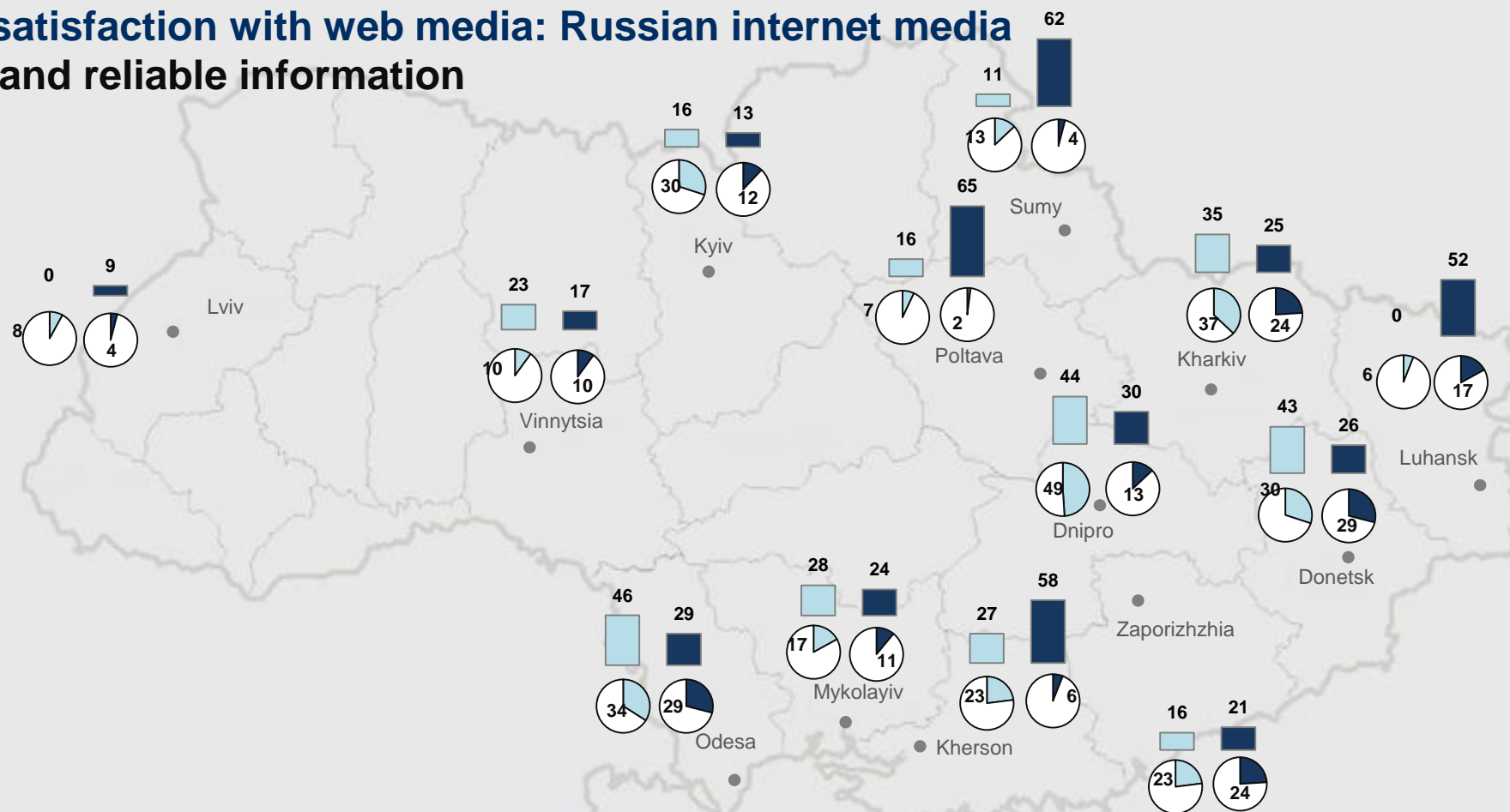
National index

31   22   25   14

USAID | U-Media Project   Internews

19

National media ratings: TV and Internet

TV 🇺🇦

Name up to 3 national TV channels, which you watch for NEWS most often.

2015		2016	
1+1	63%	1+1	62%
Inter	56%	Inter	47%
STB	35%	STB	38%
ICTV	31%	ICTV	28%
Ukraina TRC	18%	Ukraina TRC	22%
112.Ukraine	14%	Novyi	18%
5th channel	13%	112.Ukraine	15%
Novyi	12%	5th channel	8%
2+2	6%	NTN	6%
24 Channel	6%	24 Channel	4%
NTN	5%	First National	4%
First National	3%	2+2	4%
TET	3%	TET	3%

INTERNET 🇺🇦

Name up to 3 national NEWS websites you visit most often.

2015		2016	
AGGREGATORS			
Ukr.net	28%	Ukr.net	34%
Yandex	16%	Yandex	19%
Mail.ru	5%	Mail.ru	6%
SOC NETS			
Vkontakte	4%	Vkontakte	9%
Odnoklassniki	4%	Facebook	7%
Facebook	1%	Odnoklassniki	6%
Twitter	0,3%	Twitter	4%
Korrespondent.net	10%	1+1 (1plus1.ua)	6%
1+1 (1plus1.ua)	9%	UNIAN (unian.net)	6%
UNIAN (unian.net)	7%	Korrespondent.net	6%
Ukrainian pravda	6%	Ukrainian pravda	6%
Ukrainian News (mediaua.com.ua)	6%	Fakty (fakty.ua)	5%
Fakty (fakty.ua)	6%	Novosti.ua	4%
Liga.net	5%	Liga.net	3%
Vesti (vesti-ukr.com)	4%	Obozrevatel (obozrevatel.com)	3%
Obozrevatel (obozrevatel.com)	4%	Sobytiya (sobytiya.ua)	3%
Sobytiya (sobytiya.ua)	4%	Ukrainian News (mediaua.com.ua)	3%
Hromadske.TV (online)	4%	Segodnya (Segodnya.net)	3%
Novosti.ua	4%	Levyi bereg - lb.ua	3%
Segodnya (Segodnya.net)	3%	Podrobnosti.ua	3%
Podrobnosti.ua	3%	Vesti (vesti-ukr.com)	3%
Espresso.TV (online)	3%	Hromadske.TV (online)	2%
Bigmir.net	3%	Kommentarii (comments.ua)	1%
Gazeta.ua	3%	Den' (day.kiev.ua)	1%
Kommentarii (comments.ua)	2%	Racurs.ua	1%
Meta	2%	Hvylia	1%

National media rating: Press and Radio

PRESS
Name up to 3 national printed issues you read most often.
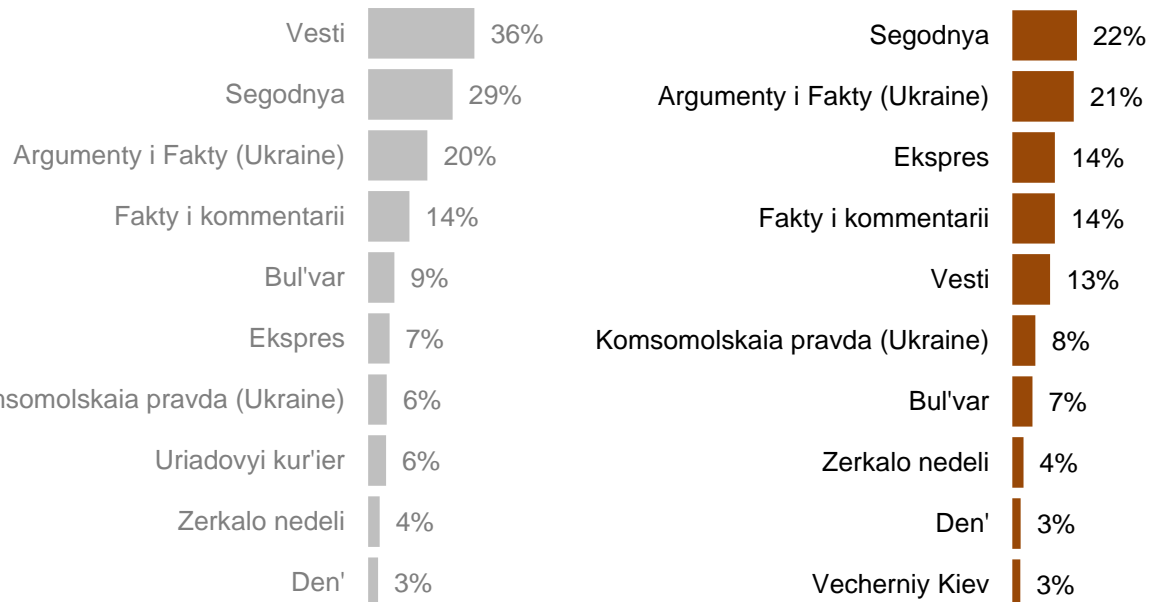
RADIO 🇺🇦
Name up to 3 national radio stations where you listen news to most often.

PRESS

2015		2016	
Vesti	36%	Segodnya	22%
Segodnya	29%	Argumenty i Fakty (Ukraine)	21%
Argumenty i Fakty (Ukraine)	20%	Ekspres	14%
Fakty i kommentarii	14%	Fakty i kommentarii	14%
Bul'var	9%	Vesti	13%
Ekspres	7%	Komsomolskaia pravda (Ukraine)	8%
Komsomolskaia pravda (Ukraine)	6%	Bul'var	7%
Uriadovyi kur'ier	6%	Zerkalo nedeli	4%
Zerkalo nedeli	4%	Den'	3%
Den'	3%	Vecherniy Kiev	3%

RADIO

2015		2016	
Hit FM	21%	Hit FM	21%
Nashe radio	19%	Shanson	18%
Shanson	17%	Nashe radio	16%
Lux FM	15%	Lux FM	15%
Avtoradio Ukraine	12%	Avtoradio Ukraine	13%
Melodiia	12%	Melodiia	12%
Russkoe radio Ukraine	11%	Retro FM	10%
Kiss FM	10%	Russkoe radio Ukraine	10%
Era FM	10%	Era FM	9%
Retro FM	10%	1st NRU (UR-1, NTRCU-1)	8%
1st NRU (UR-1, NTRCU-1)	9%	Piatnitsa	8%
Europa Plus	7%	Kiss FM	6%
Promin'	5%	Europa Plus	5%
Radio Rocks	4%	Radio Rocks	5%
24 Radio	4%	Promin'	3%
Piatnitsa	3%	Prosto radio	2%

21

Russian media ratings

TV
Name up to 3 Russian TV channels you watch for NEWS most often.

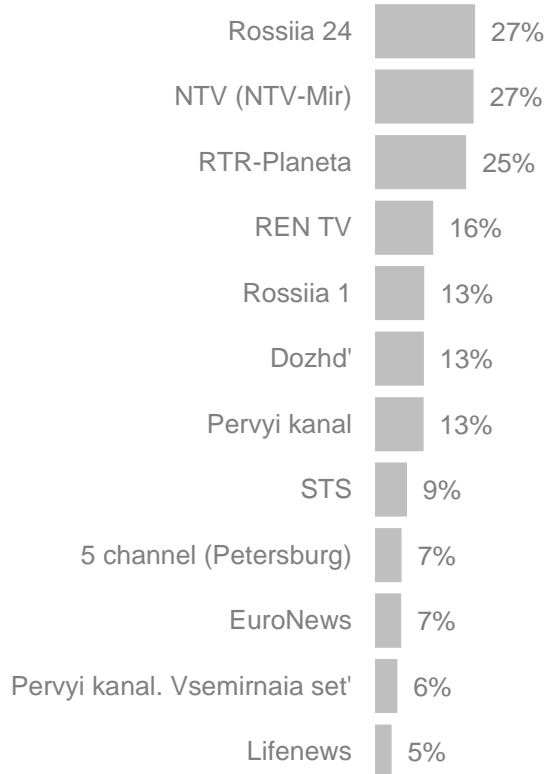| 2015		2016	
Rossiia 24	27%	Rossiia 24	27%
NTV (NTV-Mir)	27%	Rossiia 1	26%
RTR-Planeta	25%	NTV (NTV-Mir)	24%
REN TV	16%	Pervyi kanal	22%
Rossiia 1	13%	RTR-Planeta	19%
Dozhd'	13%	Dozhd'	11%
Pervyi kanal	13%	5 channel (Petersburg)	9%
STS	9%	STS	9%
5 channel (Petersburg)	7%	REN TV	8%
EuroNews	7%	Lifenews	6%
Pervyi kanal. Vsemirnaia set'	6%	EuroNews	3%
Lifenews	5%	Kuban' 24 (Russia)	3%
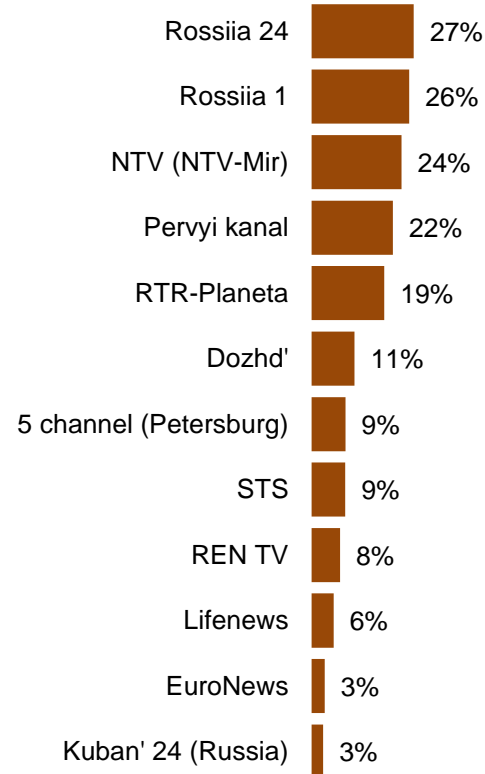
INTERNET
Name up to 3 Russian NEWS websites you visit most often.

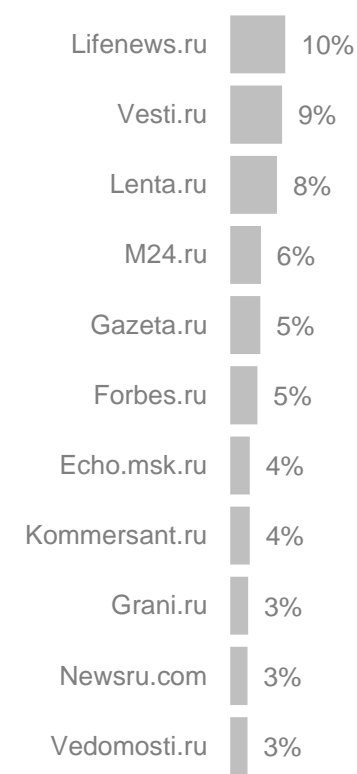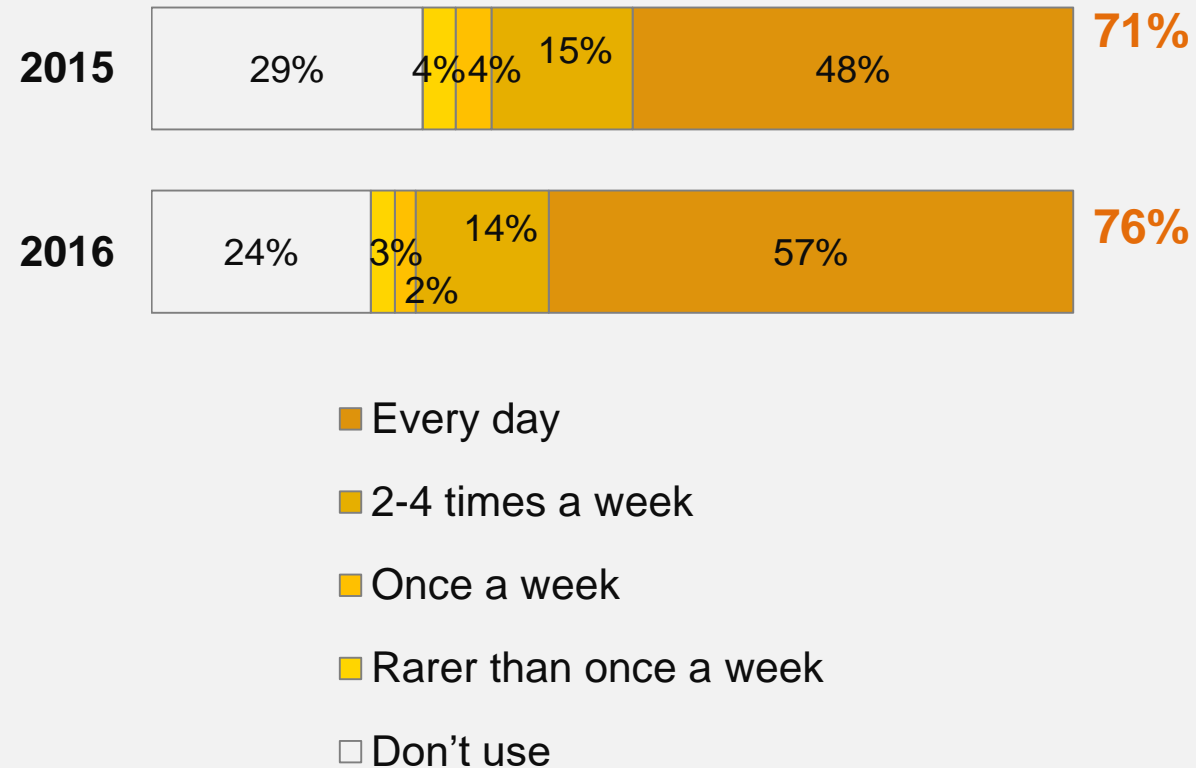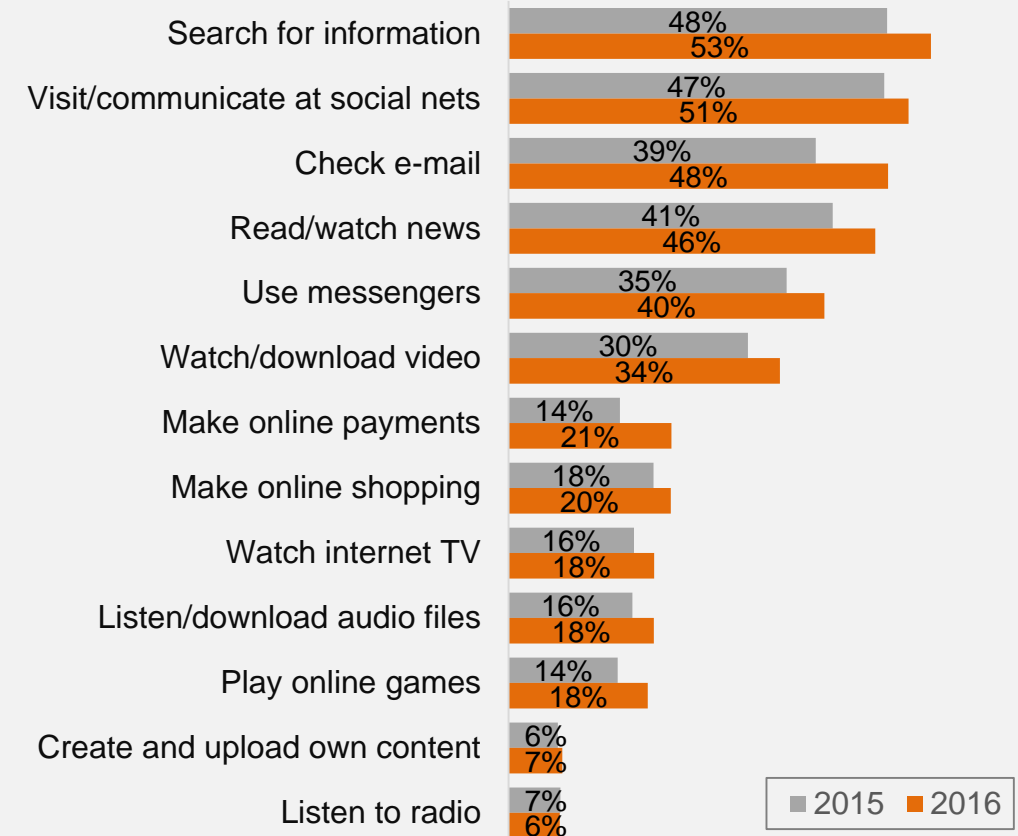| 2015		2016	
Lifenews.ru	10%	Lenta.ru	17%
Vesti.ru	9%	Vesti.ru	14%
Lenta.ru	8%	Lifenews.ru	4%
M24.ru	6%	Grani.ru	4%
Gazeta.ru	5%	Newsru.com	4%
Forbes.ru	5%	Kommersant.ru	4%
Echo.msk.ru	4%	Vedomosti.ru	4%
Kommersant.ru	4%	Business-gazeta.ru	3%
Grani.ru	3%	M24.ru	3%
Newsru.com	3%	Echo.msk.ru	2%
Vedomosti.ru	3%	Forbes.ru	2%
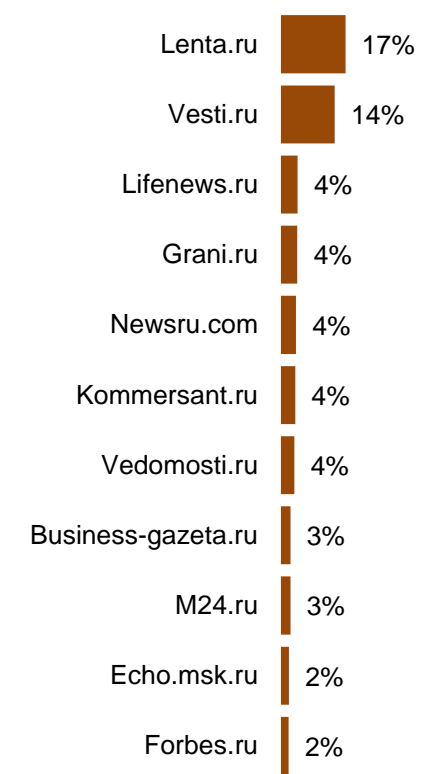
Internews

Internet usage

The share of internet users has grown to 76% over the past year; almost all are active users (at least once a week). Internet is mainly used for information searches, messaging, and news consumption.

Frequency of internet usage

2015

| 29% | 4% | 4% | 15% | 48% | **71%** |

2016

| 24% | 3% | 2% | 14% | 57% | **76%** |

- ■ Every day
- ■ 2-4 times a week
- ■ Once a week
- ■ Rarer than once a week
- □ Don't use

Purposes

| Purpose	2015	2016
Search for information	48%	53%
Visit/communicate at social nets	47%	51%
Check e-mail	39%	48%
Read/watch news	41%	46%
Use messengers	35%	40%
Watch/download video	30%	34%
Make online payments	14%	21%
Make online shopping	18%	20%
Watch internet TV	16%	18%
Listen/download audio files	16%	18%
Play online games	14%	18%
Create and upload own content	6%	7%
Listen to radio	7%	6%

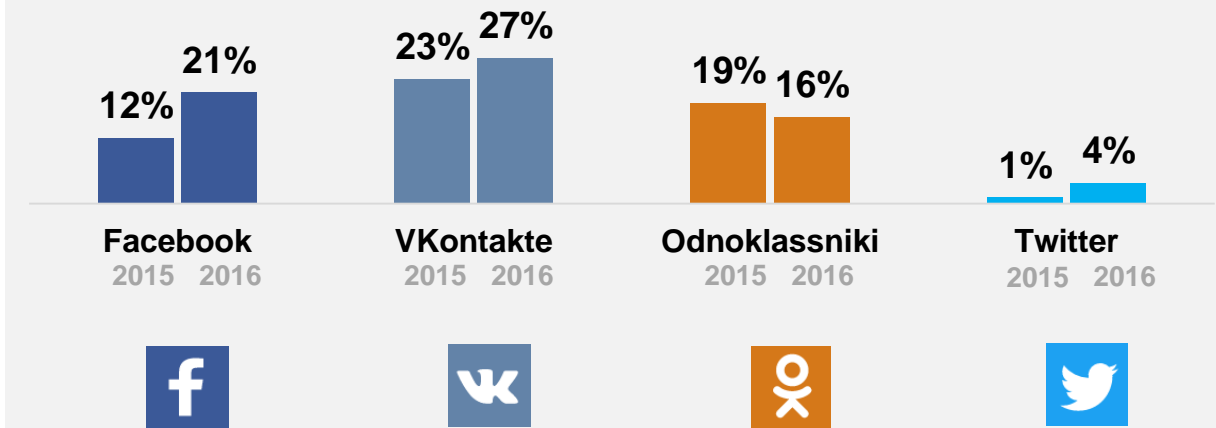■ 2015 ■ 2016

Social networks usage

The most popular social networks remain the Russian sites VKontakte and Odnoklassniki. However, the audience for Facebook and Twitter has grown dramatically over the past year. Facebook nearly matched Odnoklassniki in terms of popularity, and for under 25s, Facebook is preferred over Odnoklassniki.
The share of those getting their news from social networks has also increased. This trend is typical for all social networks except Odnoklassniki.

**Social networks usage
2015-2016**

	Facebook	VKontakte	Odnoklassniki	Twitter
2015	27%	45%	42%	7%
2016	36%	49%	40%	12%
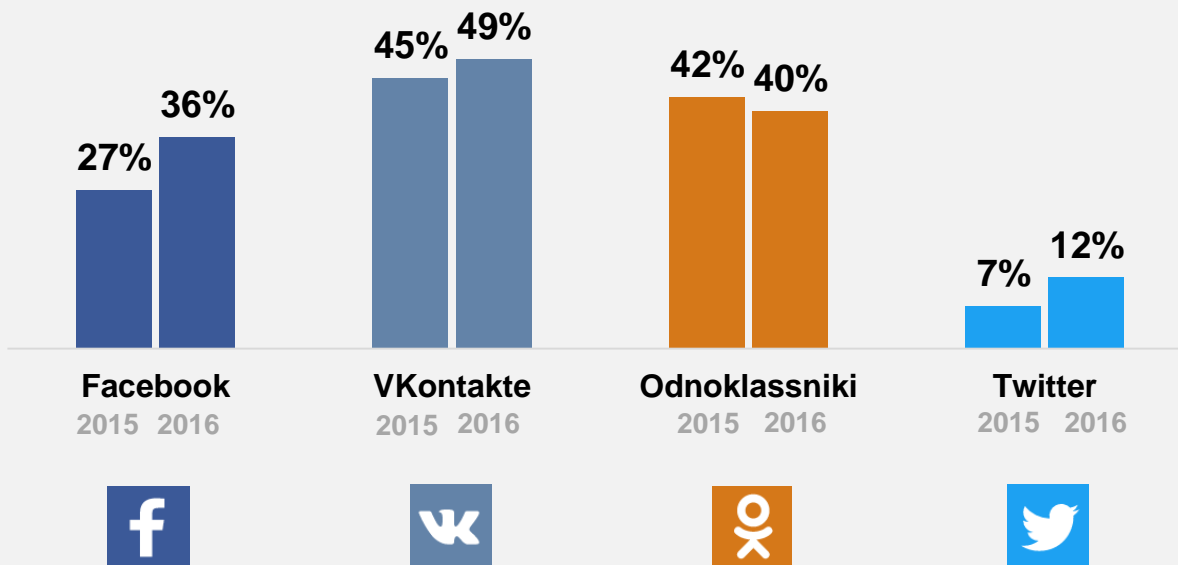
**Social networks you prefer for news
2015-2016**

	Facebook	VKontakte	Odnoklassniki	Twitter
2015	12%	23%	19%	1%
2016	21%	27%	16%	4%

Question: 1. *Which social nets do you use at least once a month?*
2. *Which one of the social nets do you prefer for receiving news?*
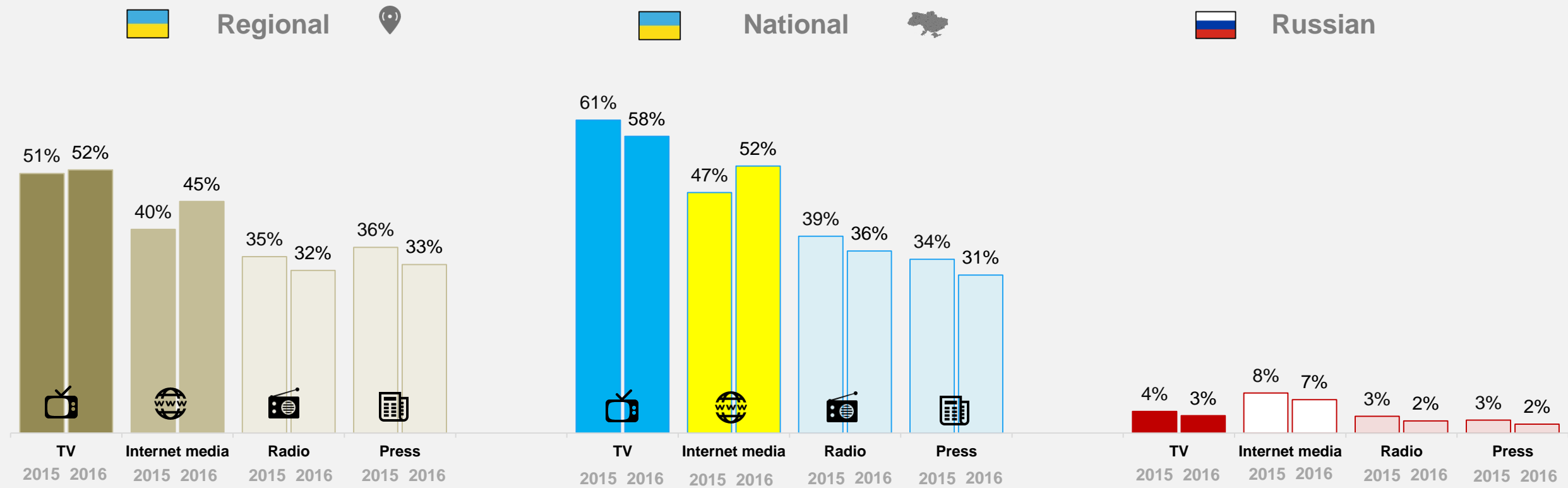
Base: *National index N~1640/wave*

24

TRUST IN MEDIA
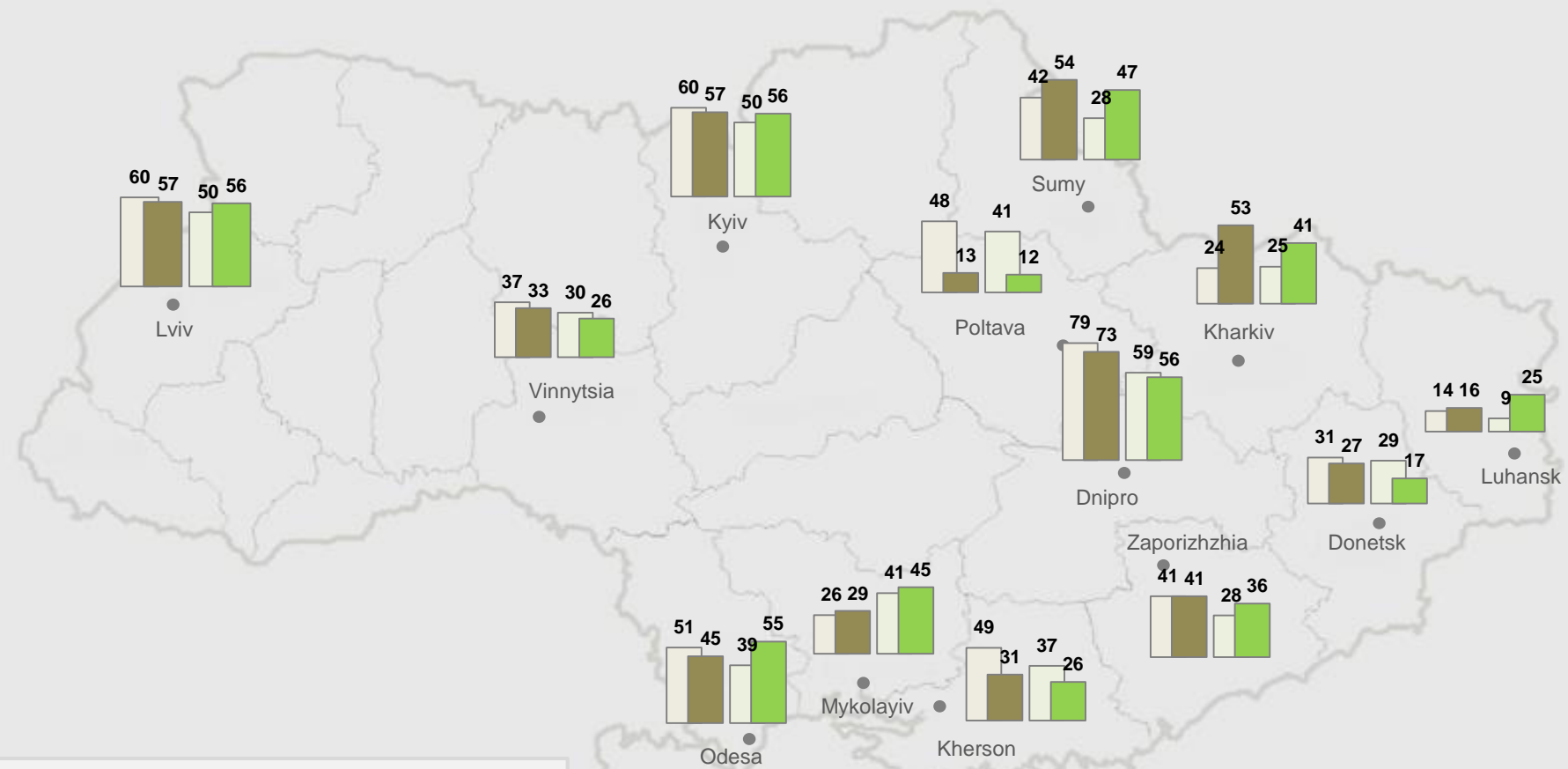
Level of trust in news media

Trust in Ukrainian internet media (both regional and national) has significantly increased over the year, particularly in Sumy, Kharkiv and Luhansk regions.

A reverse trend is observed in Poltava region, where trust in both national and regional media has declined.

Trust in media, 2015-2016

Regional

TV	Internet media	Radio	Press
51% 52%	40% 45%	35% 32%	36% 33%
2015 2016	2015 2016	2015 2016	2015 2016

National

TV	Internet media	Radio	Press
61% 58%	47% 52%	39% 36%	34% 31%
2015 2016	2015 2016	2015 2016	2015 2016

Russian

TV	Internet media	Radio	Press
4% 3%	8% 7%	3% 2%	3% 2%
2015 2016	2015 2016	2015 2016	2015 2016

Level of trust in news in regional media

Lviv 60 57 50 56

Kyiv 60 57 50 56

Sumy 42 54 28 47

Vinnytsia 37 33 30 26

Poltava 48 13 41 12

Kharkiv 24 53 25 41

Dnipro 79 73 59 56

Luhansk 14 16 9 25

Zaporizhzhia 31 27 29 17

Donetsk 41 41 28 36

Mykolayiv 26 29 41 45

Kherson 49 31 37 26

Odesa 51 45 39 55

Level of trust in the media

Regional TV

☐ - 2015

■ - 2016

Regional web resources

☐ - 2015

■ - 2016

General index
(considering each region's weight)

51 52 40 45

TV   Web resources

Level of trust in news in national Ukrainian media: Regional distribution

Lviv: 68 61 65 60

Kyiv: 70 60 54 63

Sumy: 58 61 31 54

Vinnytsia: 54 57 42 43

Poltava: 55 24 42 26

Kharkiv: 38 56 36 43

Dnipro: 81 77 62 68

Luhansk: 27 34 26 37

Zaporizhzhia: 36 40 28 16

Donetsk: 36 40 28 16

Odesa: 54 42 46 39

Mykolayiv: 39 45 42 44

Kherson: 58 42 44 46
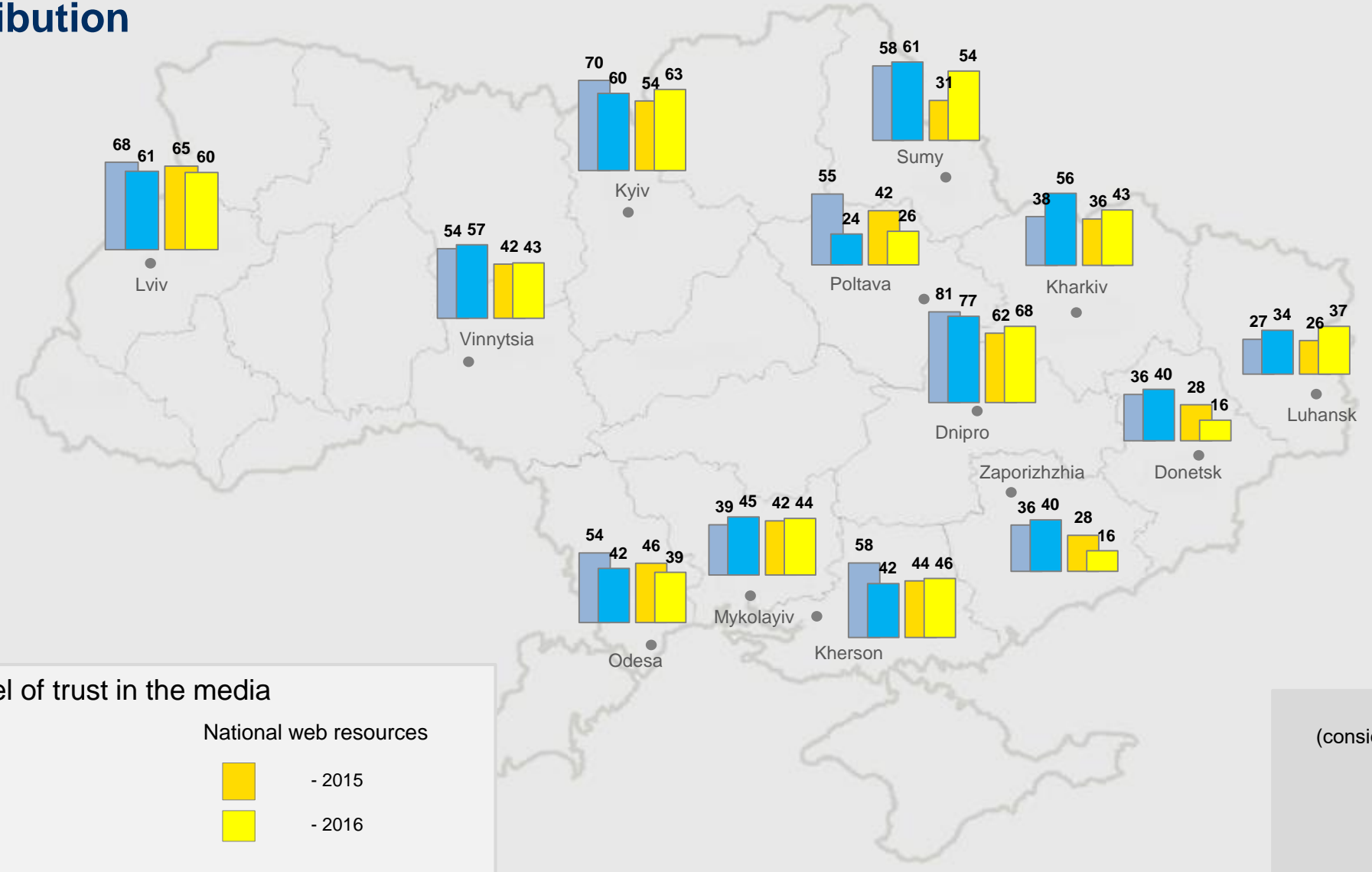
Level of trust in the media

National TV

- ☐ - 2015
- ☐ - 2016

National web resources

- ☐ - 2015
- ☐ - 2016

General index
(considering each region's weight)

61 58 47 52

TV   **Web resources**

Level of trust in news in Russian media:
Regional distribution

POLTAVA REGION

Trust to media

Trust in the media declined significantly in Poltava region over the past year. While the reasons for this are not clear, a significantly greater number of those surveyed placed more importance on news stories that show different points of view (are balanced) and stories using reliable sources for information. In Poltava, knowing the owner of the media was more important in 2016 than in 2015, whereas nationally this issue was seen as slightly less important from 2015 to 2016 (see slide 37).

Regional

	TV		Internet media		Radio		Press	
	2015	2016	2015	2016	2015	2016	2015	2016
	48%	13%	41%	12%	38%	10%	30%	3%

National

	TV		Internet media		Radio		Press	
	2015	2016	2015	2016	2015	2016	2015	2016
	55%	24%	42%	26%	34%	7%	31%	7%

Russian

	TV		Internet media		Radio		Press	
	2015	2016	2015	2016	2015	2016	2015	2016
	2%	0%	6%	1%	1%	1%	1%	0%

Which demands should be satisfied by NEWS in general? The most important.

	Honesty/reliability	Objectivity	Timeliness	Completeness of coverage	Accuracy	Separation of facts and comments
2015	53%	12%	8%	10%	7%	10%
2016	65%	5%	5%	7%	6%	12%

- Honesty/reliability
- Objectivity
- Timeliness
- Completeness of coverage
- Accuracy
- Separation of facts and comments

What signs do you use to define if the information in media should be trusted?

Pay attention to the fact if different points of view are presented
- 2015: 24%
- 2016: 36%

Pay attention to the source of the news
- 2015: 17%
- 2016: 34%

Pay attention to the owner of the media
- 2015: 2%
- 2016: 6%

MEDIA COMPETENCE

Demands to news

Respondents' demands from their news sources remained the same this year as last - the main qualities are honesty and reliability.

Main demands from the news

2015 - 2016
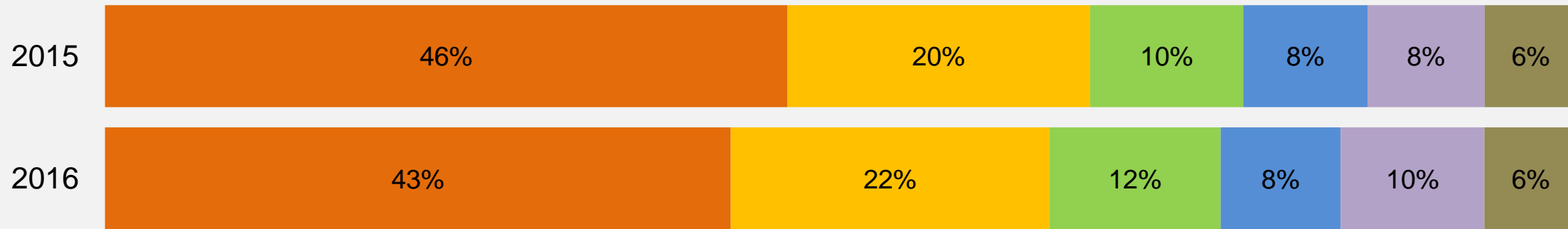
Year	Honesty/reliability	Objectivity	Timeliness	Completeness of coverage	Accuracy	Separation of facts and comments
2015	46%	20%	10%	8%	8%	6%
2016	43%	22%	12%	8%	10%	6%

- Honesty/reliability
- Objectivity
- Timeliness
- Completeness of coverage
- Accuracy
- Separation of facts and comments

Question: *Which demands should be satisfied by NEWS in general? Ranking. The most important is shown.*

Base: *Total, N~1640/wave*

32

Signs of reliable information

The majority of respondents said they are able to define trustworthy information in one way or another. Same as before, reliability is connected with the source of the news or with an impression of well-balanced points of view expressed in the news. The share of those who trust all of their favorite media has grown over the past year. The increase is observed in Sumy, Mykolayiv, Dnipro, Kharkiv, Donetsk and Luhansk regions.
At the same time, practically in all regions except Sumy and Vinnytsia, the percentage of those who simply use their instincts/feelings to decide what media to trust is on the decline.

What signs do you use to define if the information in media should be trusted?
2015-2016

	2015	2016
Pay attention to the fact if different points of view are presented	28%	28%
Pay attention to the source of the news	24%	25%
Pay attention to the owner of the media	13%	11%
Trust all the media I know / am used to	24%	28%
Intuitively, do not look for any particular characteristics	29%	19%
I don't know how to define it	12%	11%
Hard to say	6%	6%

Awareness of and ability to identify *Jeansa*

The share of people aware of *jeansa* (content written for or placed by special interests and displayed as news) has grown over the past year. However, among those aware of *jeansa,* fewer say they can identify *jeansa* in the press.

Awareness of jeansa

Year	Hard to say	Unaware	Aware
2015	14%	38%	49%
2016	10%	35%	55%

■ Hard to say ■ Unaware ■ Aware

Ability to distinguish (self-evaluation)

Year	No	Yes
2015	43%	57%
2016	53%	47%

□No ■Yes

Question: *1. Are you aware of a possible appearance of paid publications/hidden advertisement (jeansa) in the guise of ordinary materials in media?*
2. In your opinion, are you able to distinguish such materials from ordinary materials?

Base: *Total, N~1640/wave*
Aware ones, N~850/wave

34
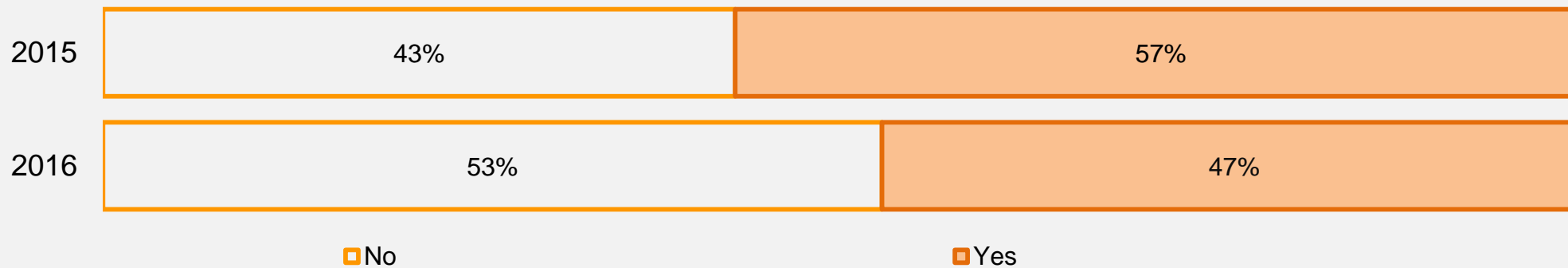
Jeansa

Less than half of those surveyed consider *jeansa* to be that much of a problem. Of those that do consider it to be a real problem, fewer feel they have the ability to fight against it.

How serious is the *jeansa* problem to you?
2015-2016

	N/A	Not actual	Actual – I'm irritated by this problem, but don't know how to fight it	Actual – I'm irritated by this problem, and actively fight it
2015	9%	55%	33%	3%
2016	11%	56%	29%	3%
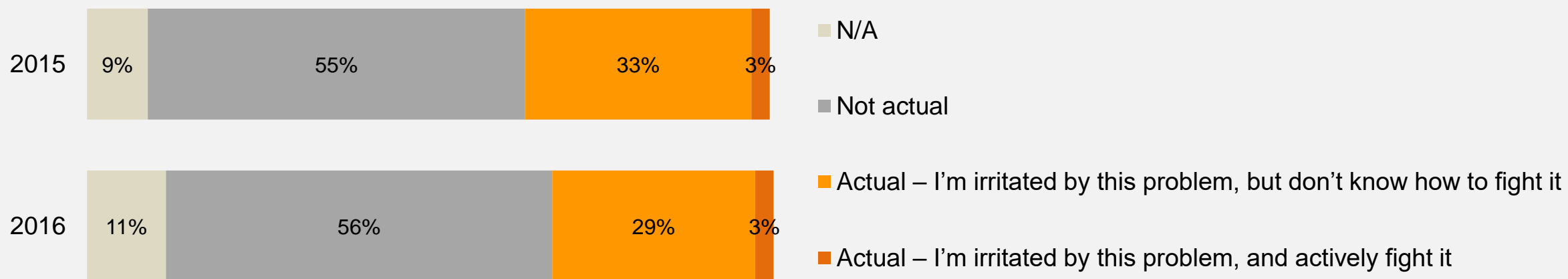
Jeansa: frequency

TV is seen as the main source of *jeansa* (paid materials). Those who claim the ability to spot *jeansa* have most often seen it on Russian channels. According to the respondents, the frequency of *jeansa* has increased in Russian media over the past year. They also say there is more *jeansa* on regional TV.

Jeansa frequency, 2015-2016
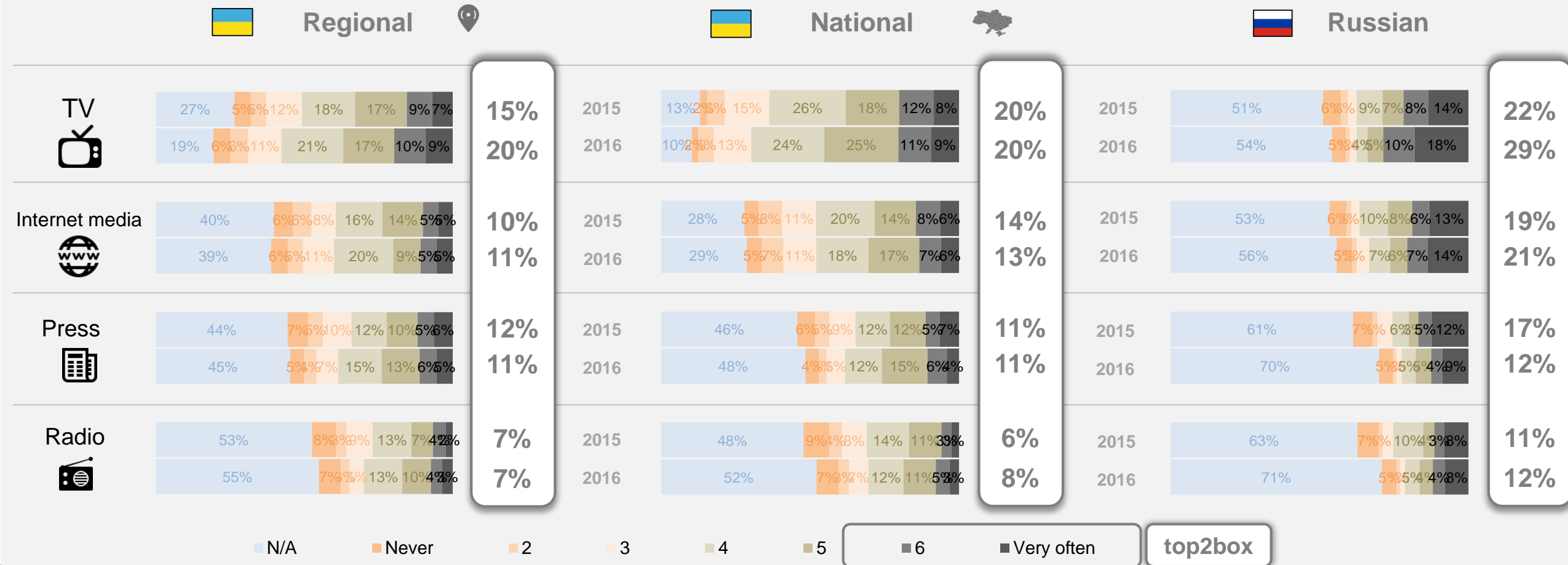
	Regional		National		Russian	
TV						
2015	27% 5%5%12% 18% 17% 9%7%	15%	13%2%2% 15% 26% 18% 12% 8%	20%	51% 6%2% 9%7%8% 14%	22%
2016	19% 6%5%11% 21% 17% 10% 9%	20%	10%2%7% 13% 24% 25% 11% 9%	20%	54% 5%4%5% 10% 18%	29%
Internet media						
2015	40% 6%6%8% 16% 14% 5%5%	10%	28% 5%8% 11% 20% 14% 8%6%	14%	53% 6%4% 10%8% 6% 13%	19%
2016	39% 6%5%11% 20% 9% 5%5%	11%	29% 5%7% 11% 18% 17% 7%6%	13%	56% 5%2% 7%6%7% 14%	21%
Press						
2015	44% 7%5%10% 12% 10% 5%6%	12%	46% 6%5%9% 12% 12% 5%7%	11%	61% 7%2% 6%3% 5% 12%	17%
2016	45% 5%4%7% 15% 13% 6%5%	11%	48% 4%5%6% 12% 15% 6%4%	11%	70% 5%3%5%4% 9%	12%
Radio						
2015	53% 8%3%9% 13% 7%4%2%	7%	48% 9%4%8% 14% 11% 3%3%	6%	63% 7%3% 10%4% 3%8%	11%
2016	55% 7%3%5% 13% 10% 4%2%	7%	52% 7%3%7% 12% 11% 5%2%	8%	71% 5%3%5%4%4% 8%	12%

Legend: ■ N/A ■ Never ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ Very often | top2box

Attitude towards media owners

Importance of knowing the media owners has not changed over the year, but the share of those claiming awareness of local/national media owners has grown.

Awareness of owners of local media

Year	N/A	Don't know	Know
2015	8%	71%	20%
2016	4%	62%	35%

■ N/A ■ Don't know ■ Know

Awareness of owners of national TV channels

Year	N/A	Don't know	Know
2015	6%	48%	45%
2016	3%	48%	50%

■ N/A ■ Don't know ■ Know

Importance of knowing the media owner

Year	N/A	Not important	Rather not important	Rather important	Very important	top2box
2015	7%	28%	26%	28%	11%	**39%**
2016	6%	27%	29%	27%	11%	**38%**

■ N/A ■ Not important ■ Rather not important ■ Rather important ■ Very important **top2box**

Question: *How important is for you to know who is the media's owner?*
Do you know who is the owner of local media you regularly read/watch/listen?
Do you know who are owners of national TV channels?

Base: *Total, N~1640/wave*

37

Penetration of digital TV (T2)

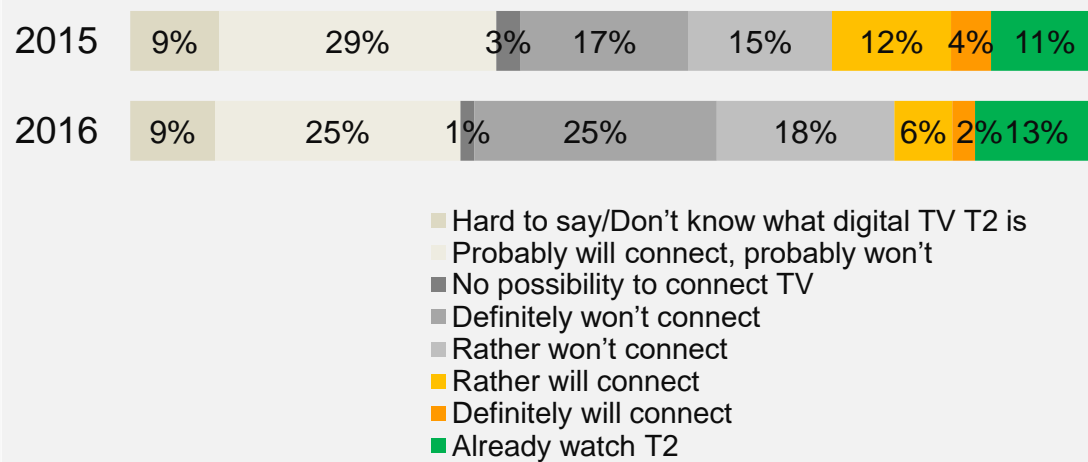Awareness of digital TV (T2) has grown a little over the year. Cable TV remains the most common. Use of analog TV is decreasing, and use of digital TV has seen little growth. The largest increase in digital TV usage was in Sumy and Dnipro regions.

Awareness of digital TV T2

Year	Unaware	Aware
2015	45%	55%
2016	39%	61%

Legend: ■ Unaware ■ Aware
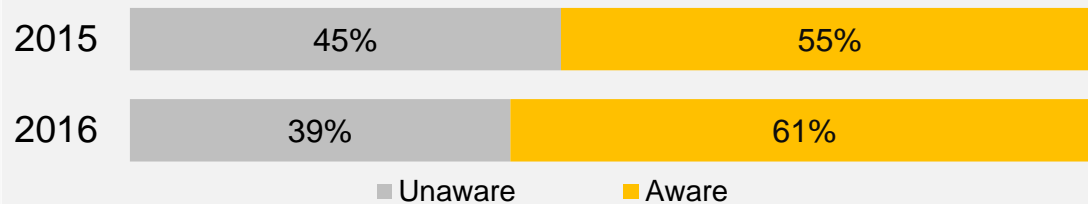
Connection to digital TV T2

2015: 9% | 29% | 3% | 17% | 15% | 12% | 4% | 11%

2016: 9% | 25% | 1% | 25% | 18% | 6% | 2% | 13%

Legend:
- ■ Hard to say/Don't know what digital TV T2 is
- ■ Probably will connect, probably won't
- ■ No possibility to connect TV
- ■ Definitely won't connect
- ■ Rather won't connect
- ■ Rather will connect
- ■ Definitely will connect
- ■ Already watch T2

What types of TV signal are currently used at home

	2015	2016
Cable	55%	56%
Analogous	20%	14%
Satellite	13%	13%
Digital T2	11%	13%
Online TV	6%	7%
IPTV with receiver	0,2%	0,6%
Hard to say	1%	1%
Do not use TV	3%	4%

Legend: ■ 2015 ■ 2016
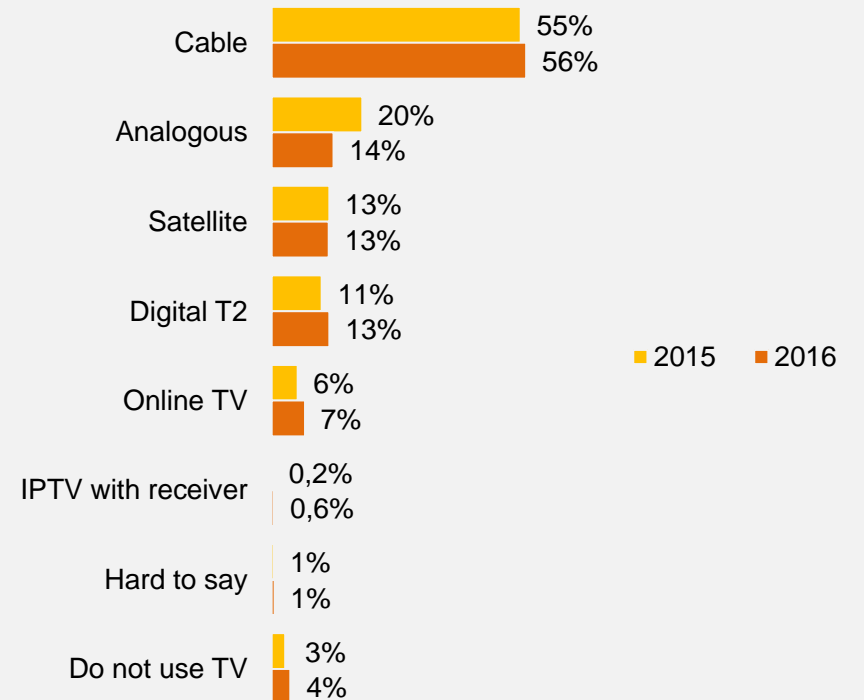
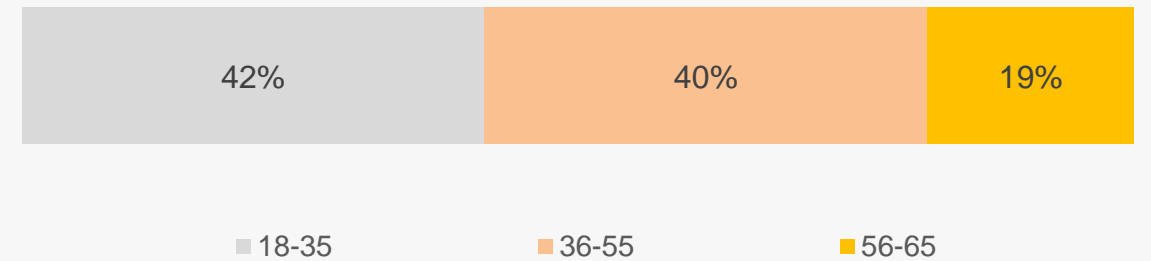# SOCIAL-DEMOGRAPHIC PROFILE

Social-demographic profile

Gender

47%	53%

■ Male ■ Female

Age

42%	40%	19%

■ 18-35 ■ 36-55 ■ 56-65

Income

8%	33%	52%	4%	

■ Low ■ Below average ■ Average ■ Average+ ■ High ▢ Hard to say / Refuse

Settlement type

16%	33%	39%	12%

■ Kiev city ■ 500 000+ ■ 100 000 - 499 999 ■ 50 000 - 99 999
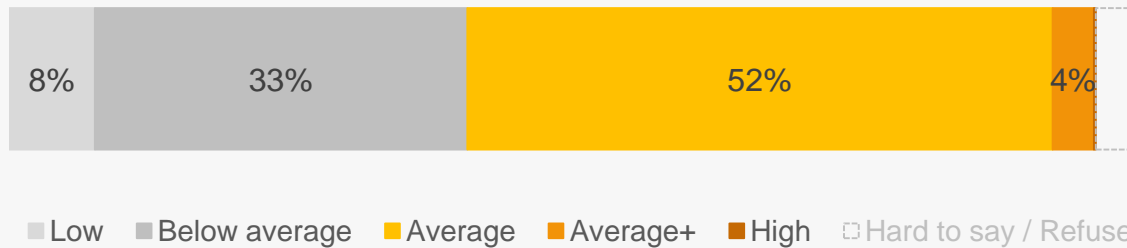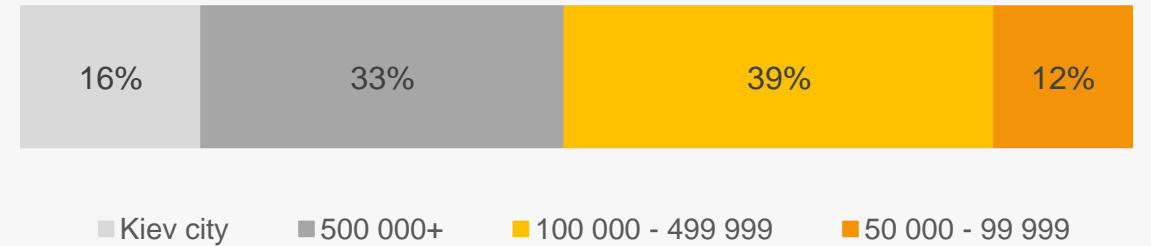
Social-demographic profile

Region

Region	%
Kyiv	18%
Dnipro	13%
Kharkiv	9%
Odesa	7%
Donetsk	6%
Zaporizhzhia	6%
Lviv	5%
Zhytomyr	3%
Mykolayiv	3%
Poltava	3%
Sumy	3%
Cherkasy	3%
Luhansk	2%
Vinnytsia	2%
Volyn'	2%
Ivano-Frankivsk	2%
Kirovohrad	2%
Kherson	2%
Khmelnytskyi	2%
Chernihiv	2%
Zakarpattia	1%
Rivne	1%
Ternopil	1%
Chernivtsi	1%
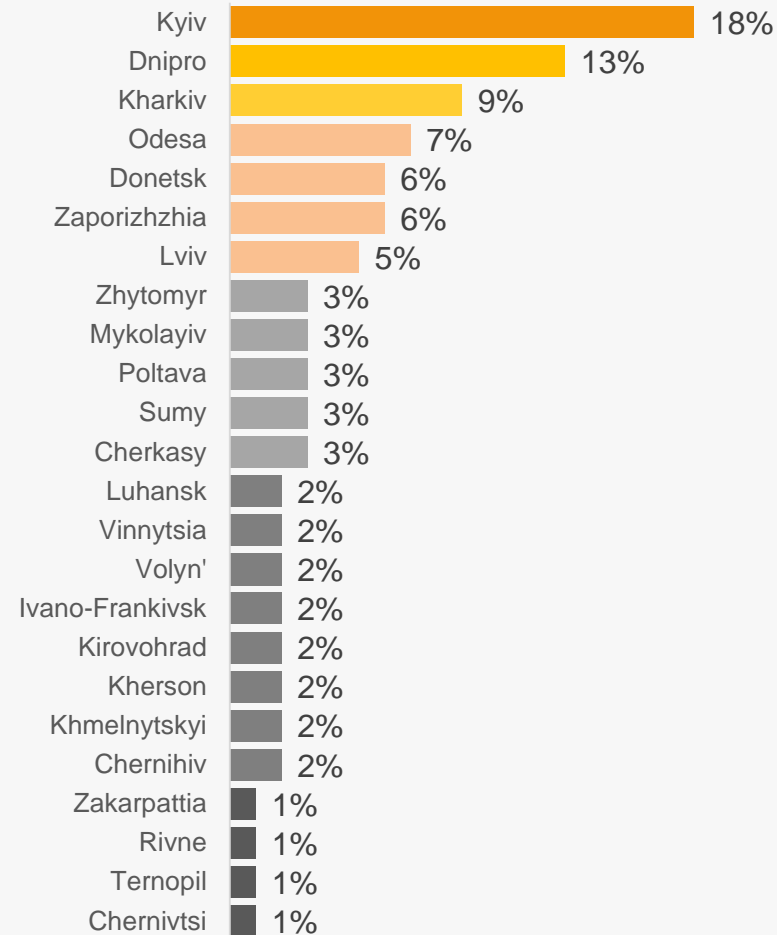
Social-demographic profile

Education

Higher	36%
Higher incomplete	6%
Secondary special	33%
Vocational school after complete secondary education	9%
Secondary	13%
Vocational school after incomplete secondary education	1%
Secondary incomplete	1%

Occupation

Worker, agricultural worker	20%
Specialist (higher education)	21%
Employee (no need of higher education)	16%
Individual worker	5%
Businessman, private entrepreneur	3%
Serviceman, law-enforcement officer	1%
Retired	13%
Keeps house	8%
Unemployed	6%
Student	6%

Family status

Married / living together	Divorced	Not married	Widow(er)	Refuse
67%	8%	19%	5%	1%

Children

No children above 18 y.o.	Children 0-6	Children 7-18
54%	26%	24%

Size of the household

1	2	3	4	5	6	7
9%	26%	38%	19%	6%	2%	