

MEDIA CONSUMPTION IN UKRAINE 2017



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September 2017

NATIONAL SURVEY

Audience: general public

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Goals and objectives of the study

- Define attitude of general public to media
- Measure level of satisfaction with regional, national and Russian media of all types
- Evaluate preferences regarding different media types
- Assess consumption of different types of media
- Evaluate level of trust in different types of media
- Estimate media competence of the population
- Assess the level of awareness and understanding of media coverage of Ukraine's reform process

RESEARCH DESIGN

Method

F2F

Target audience

Male/Female 18-65

Fieldwork

Wave 2015: May – June

Wave 2016: May – June

Wave 2017: May – June

Sample size

Representative part ~ 1640 interviews/wave

Total sample - 4048 interviews/wave, of which

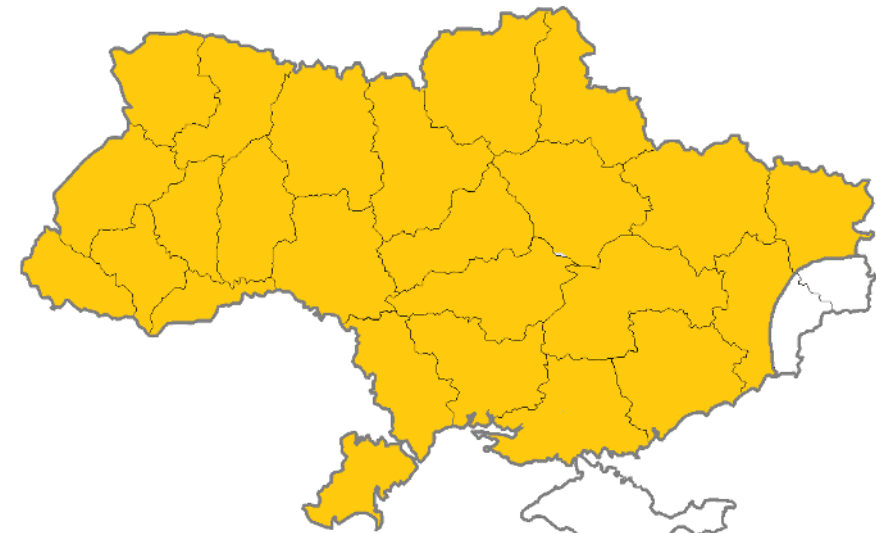
300 interviews in each of 12 regions: Kyiv, Vinnytsia, Dnipro, Donetsk, Zaporizhzhia, Lviv, Mykolayiv, Odesa, Poltava, Sumy, Kharkiv, Kherson

Focus Groups: Small gatherings in several regions, across age groups.

Geography

Ukraine, cities 50K+

Crimea and DNR/LNR area are excluded



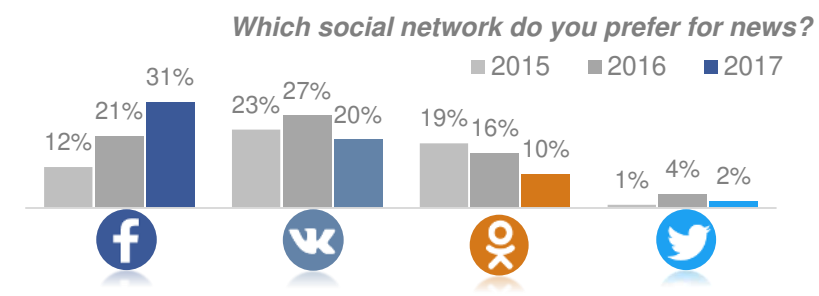


Key Findings (1)

Online media (news sites and social networks) remain most popular among the younger age group (up to 35 years).

Consumers prefer news aggregators (e.g. ukr.net) for news online.

The structural pattern of the use of social networks has undergone significant change – surveyors found a decrease in the share of users of Russian social networks, and an increase in the Facebook audience, which is currently the most popular social network in Ukraine.



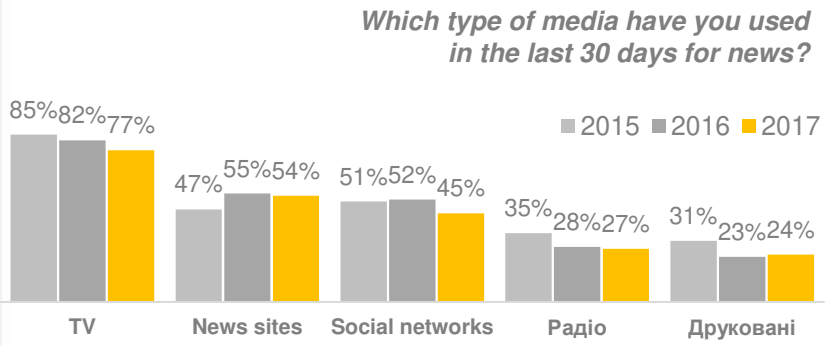
TRUST IN MASS MEDIA

Trust in mainstream media – both TV and online – declined in 2017. This is evident in both national and regional media.

As before, the level of trust in Russian media sources remains low. The vast majority of those who trust Russian media live in the East.

The share of passive media audience is increasing - over a one month period, a higher number of people did not use media to obtain news. This is especially true when it comes to younger audiences.

Television remains the leading media for older audiences (46+). The most popular TV channels are 1+1, Inter and STB.



*To what extent do you trust the news?
(the share of respondents who trust completely or rather trust)*

	2015	2016	2017
Trust in national mass media			
TV	61%	58%	54%
Online	47%	52%	48%
Print	34%	31%	28%
Radio	39%	36%	33%
Trust in regional mass media			
TV	51%	52%	46%
Online	40%	45%	42%
Print	36%	33%	31%
Radio	35%	32%	30%
Trust in Russian mass media			
TV	4%	3%	6%
Online	8%	7%	10%
Print	3%	2%	6%
Radio	3%	2%	6%



Key Findings (2)

When it comes to media preferences, the national media dominates the regional in all categories, except print media. The share of the Russian media audience continues to decline.

TV AUDIENCE

On which TV channels have you watched news broadcasts in the last 30 days? (for the TV audience)

	2015	2016	2017
The Use of TV			
National	99%	99%	99%
Regional	43%	44%	39%
Russian	12%	7%	5%

National TV: More than 95% of TV viewers within all Ukrainian oblasts prefer national TV channels.

Regional TV: The highest rates were recorded in Odesa (72%), Lviv (65%), and Donetsk (64%) oblasts; the lowest – in Luhansk oblast (33%). The greatest decrease in regional TV audience was observed in Dnipropetrovsk, Kharkiv and Kherson oblasts.

Russian TV: Similar to the previous surveys, people in eastern and southern regions of Ukraine demonstrated the highest consumption of Russian TV (7-8%).

INTERNET MEDIA AUDIENCE

Which news sites have you visited in the past 30 days? (for the internet & digital media audience)

	2015	2016	2017
The Use of the internet			
National	93%	91%	90%
Regional	28%	31%	31%
Russian	25%	14%	12%

National web-based media: The lowest rates of national online media consumption were observed in Poltava (55%), Mykolaiv (66%) and Donetsk oblasts (71%).

Regional web-based media: The most popular regional web-based media were found in the South of Ukraine – in Mykolaiv (77%) and Odesa (65%) oblasts.

Russian web-based media: the highest number of the Russian web-based media consumers was reported in Kharkiv oblast (31%). There has also been an increase in Russian internet media consumers in Sumy oblast.

PRESS AUDIENCE

Which print sources have you read in the last 30 days? (for the print media audience)

	2015	2016	2017
The Use of Press			
National	61%	55%	50%
Regional	63%	70%	68%
Russian	7%	3%	1%

National Press: The overall use of national print media continues to decrease gradually. The highest consumption of Ukrainian print sources was recorded in the northern region (80%).

Regional Press: Regional media remain more popular among print media users. More than half of printed press readers in all Ukrainian regions prefer regional media.

Russian print media: not widespread.

RADIO AUDIENCE

Which radio stations have you listened to for news in the last 30 days? (for the radio audience)

	2015	2016	2017
The Use of Radio			
National	87%	90%	93%
Regional	27%	28%	25%
Russian	11%	4%	1%

National radio stations constitute the most popular type of radio, while regional radio stations are mainly popular in Lviv (77%) and Sumy (74%) oblasts. Russian radio stations are not popular in Ukraine.



Key Findings (3)

MEDIA COMPETENCE

Similar to the 2016 study, credibility and reliability of information remain Ukrainians' main requirements for news.

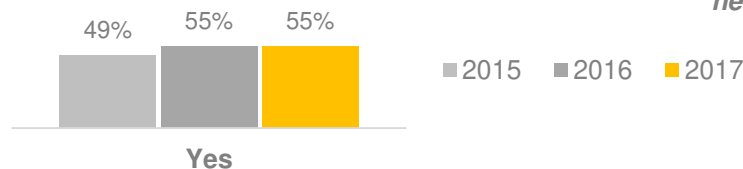
In general, to what requirements should the news correspond? (the most important)

	2015	2016	2017
Credibility / reliability	46%	43%	43%
Objectivity	20%	22%	24%
Timeliness	10%	12%	10%
Completeness of coverage	8%	8%	9%
Accuracy	8%	10%	8%
Separation of facts and comments	6%	6%	5%

The majority of respondents were well aware of the existence of sponsored or "special-request" materials in mass media known as *jeansa*. Most of those who said they are aware of *jeansa* also declared their ability to track such materials in the general information flow.

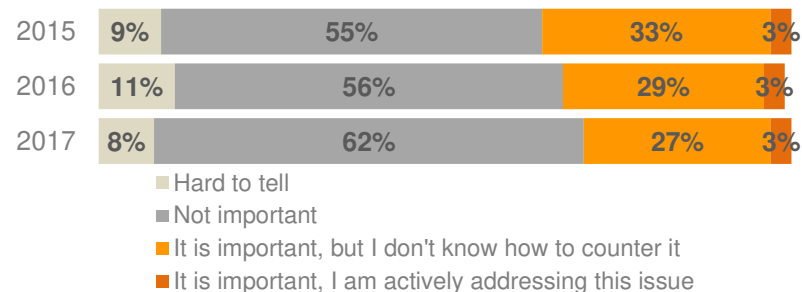
The reliability of the news source and a balance of viewpoints presented in the material remain the key criteria for identifying credible information. A rather high share of respondents confirmed the trend of trusting only favorite media channels.

Do you know about sponsored / "paid for" materials in the media, as well as hidden advertising presented in the form of news?



The share of people who could detect sponsored materials has increased since last year. The largest increase was recorded in Kyiv, Kharkiv and Mykolaiv oblasts. A higher percentage saw the issue of sponsored material to be irrelevant, since they were able to find and skip such materials. About 22% of respondents are aware of and accept the existence of sponsored materials.

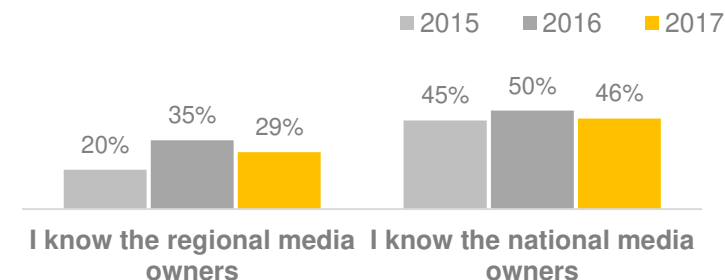
Is the issue of sponsored / "paid for" materials in the media important for you?



TV is consistently perceived as the main source of sponsored materials.

Fewer Ukrainians feel it is important to know who owns their media (from 27% in 2016 to 31% this year). At the same time, the number of people claiming to know the names of regional media owners has decreased.

Do you know the names of the media owners?



More people are watching the *Slidstvo.info* (*Investigation.info*) investigative reporting TV shown seen nationwide than ever before, but viewers expressed less satisfaction with the program over last year - more people assigned lower scores to such categories as information credibility, clear and logical manner of presentation, and convenient time slots for broadcast.

The share of respondents who in a 30-day period read or heard news related to obtaining public officials' declarations of income and assets continued to grow in 2017. Television remains the leading media source for such reports. Meanwhile, the share of people finding these reports in social networks is also increasing.

FOCUS GROUP Results (Anecdotal): Advantages/shortcomings of different sources and their Target Audience

Media Type	Advantages	Shortcomings	Target audience
<p>Print media</p>	<ul style="list-style-type: none"> • Mobility (can take it with you anywhere, not dependent on electricity, coverage etc.) • No hurry (can read and analyze at your own discretion) • Content variety (different sections, not just politics) • Lack of unexpected (pop-up) advertising 	<ul style="list-style-type: none"> • Expensive (quality media costs money) • Not timely • Large format is inconvenient to read while on transportation 	<ul style="list-style-type: none"> • Older generation • For those who use public transportation (read on the way)
<p>TV</p>	<ul style="list-style-type: none"> • Sense of being there («you see journalists and events with your own eyes») • Simplicity. Does not require any action from consumer apart from the push of a button • Station variety • Objectivity (reports on the spot are shown) • Responsibility. News presentation is regulated by norms and rules (checks before airtime) • Communication tool (neighbor watches the same programs, a good conversation starter) 	<ul style="list-style-type: none"> • Lots of adverts • Distortion/one-sidedness of information (“presentation depends on the media owner’s wishes”) • Inability to choose news according to personal interests • Too much negative news (criminal chronicles) • Repetitiveness of news 	<ul style="list-style-type: none"> • Middle-aged and older (young people watch less) • For those who spend a lot of time at home (for example, homemakers)

FOCUS GROUPS (Anecdotal): Advantages/shortcomings of different sources and their TA

Type of source	Advantages	Shortcomings	Target audience
Radio	<ul style="list-style-type: none"> • Brevity/conciseness • Not imposing (acts as a backdrop) • Just facts • Efficiency 	<ul style="list-style-type: none"> • Superficiality (too short). Does not provide the full picture. You need to look for additional data in other sources. • “Dry” 	<ul style="list-style-type: none"> • Everybody • Especially car owners • Pensioners (habit of listening in the kitchen) • Service employees (beauty salons, food establishments)
News websites	<ul style="list-style-type: none"> • Speed of news coverage • Freedom of choice (you choose the websites and the news, allows you to develop) • Topic variety • Freedom of speech • Accessibility, no need for a schedule (you can find what you're interested in at any time) 	<ul style="list-style-type: none"> • Spreading untruthful information («a news dump»), in particular, in the need for speed • Time-consuming because of too much information («a lot of information garbage») • Restricted access. You can't always use it (firewalls) • Too many adverts • Older Target Audience — cost of internet access. 	<ul style="list-style-type: none"> • Everyone who has the Internet («even elderly women use gadgets nowadays») • Most of this audience is young.
Social media	<p>Possibility of checking for truthfulness and objectivity thanks to:</p> <ul style="list-style-type: none"> • data on the author («you can go to his page and check») • comments which you can either read or ignore (the youngest Target Audience). • Convenience. You are offered choices of what to read. • Target topics. Data is grouped according to interests. 	<ul style="list-style-type: none"> • A lot of subjectivity (impose personal views) and unreliable information, since everyone writes what she wants 	<ul style="list-style-type: none"> • Mainly youth • Students • Homemakers

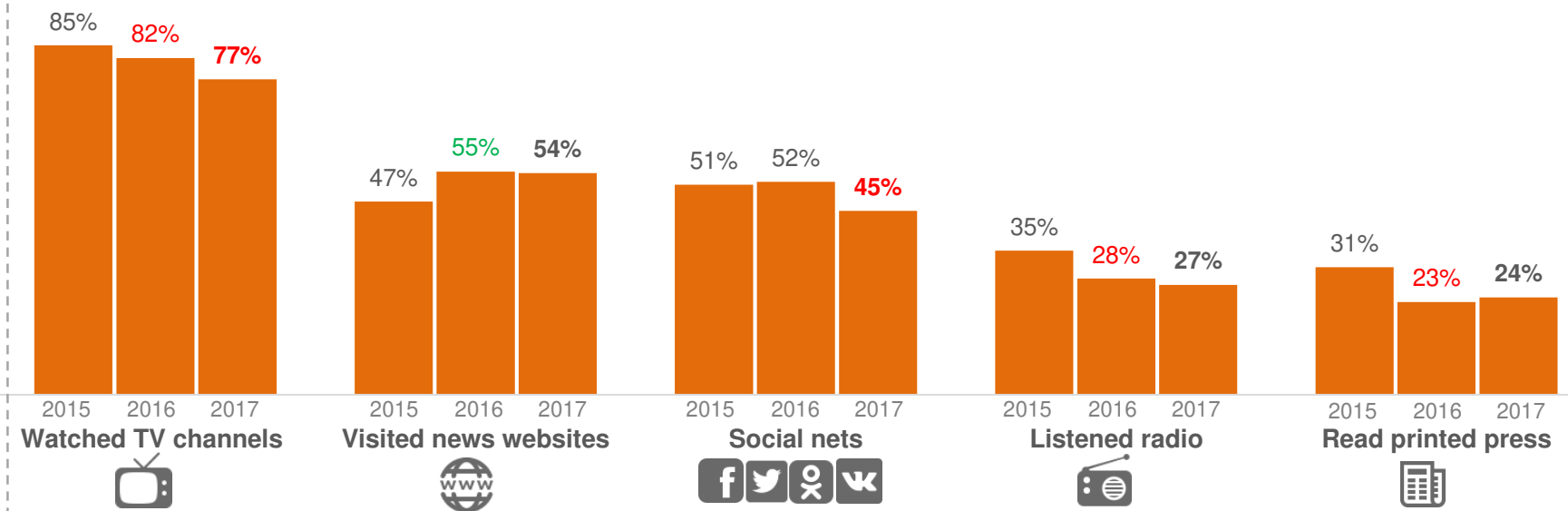
MEDIA CONSUMPTION



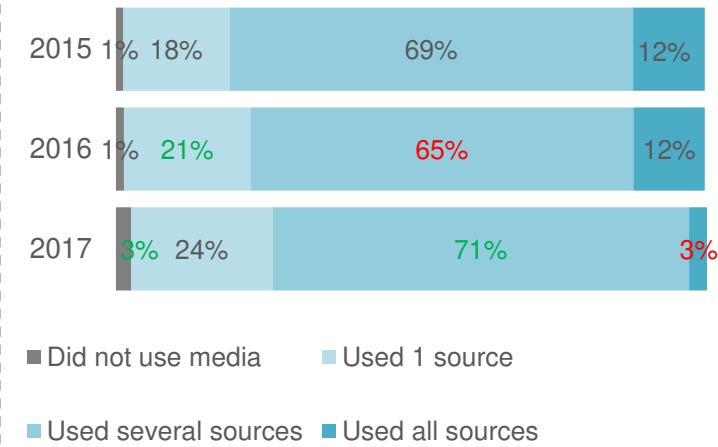
Media activity

Although television remains people's main source of news, it continues to lose its audience (the share of TV viewers has decreased by 5% to 77% over the last year). In addition, there was a drop in the use of social networks last year – it decreased by 7% to 45%. Only 3% of the population declared not using the media at all for news.

Media activity per month 2015-2017



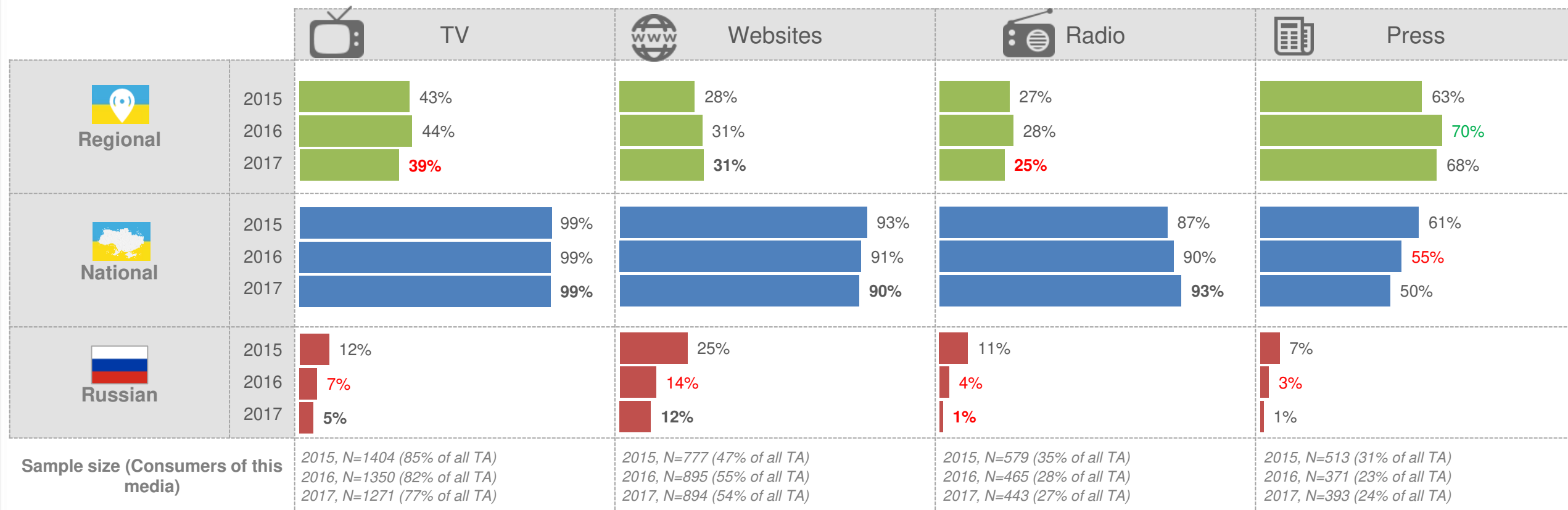
Number of media sources per month 2015-2017



Media types: Regional VS National VS Russian

Considering media types, respondents preferred national media to regional in all categories, except print media. The share of the regional media audience has decreased since last year (39% versus 44% in 2016). The Russian media consumption rates also continue to show a clear downward trend.

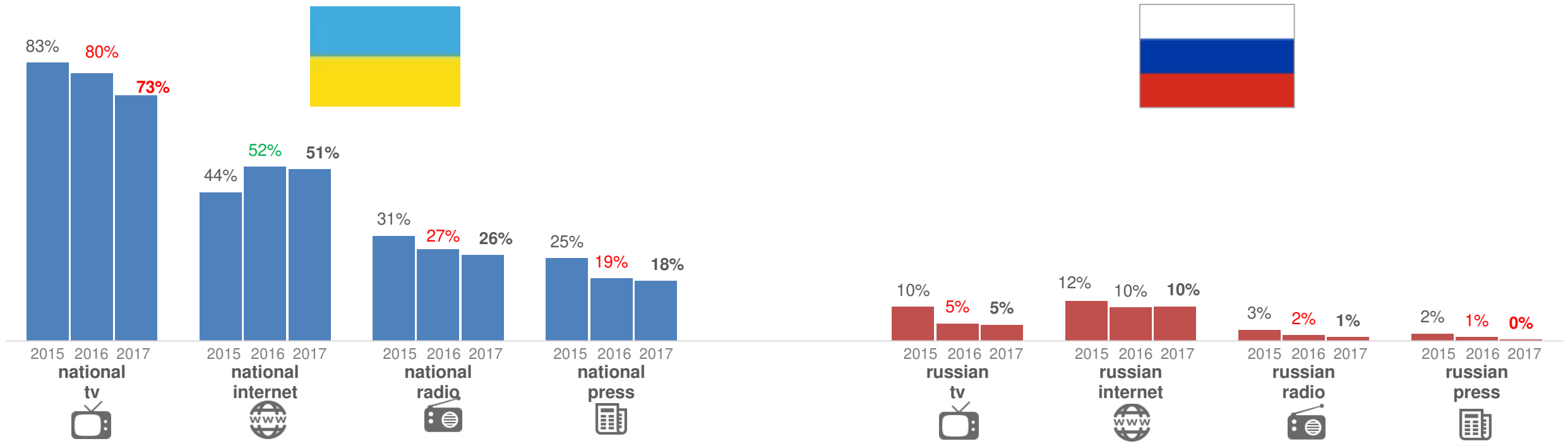
Which media's news have you consumed during last 30 days?



Weekly usage of various media

The majority of the population gets their news from the Ukrainian media. Ukrainian TV news is still the most used media channel for obtaining news, but it continues to slip. The share of respondents watching TV at least once a week has decreased from 80% to 73% since 2016.

Weekly usage of media for obtaining news 2015-2017

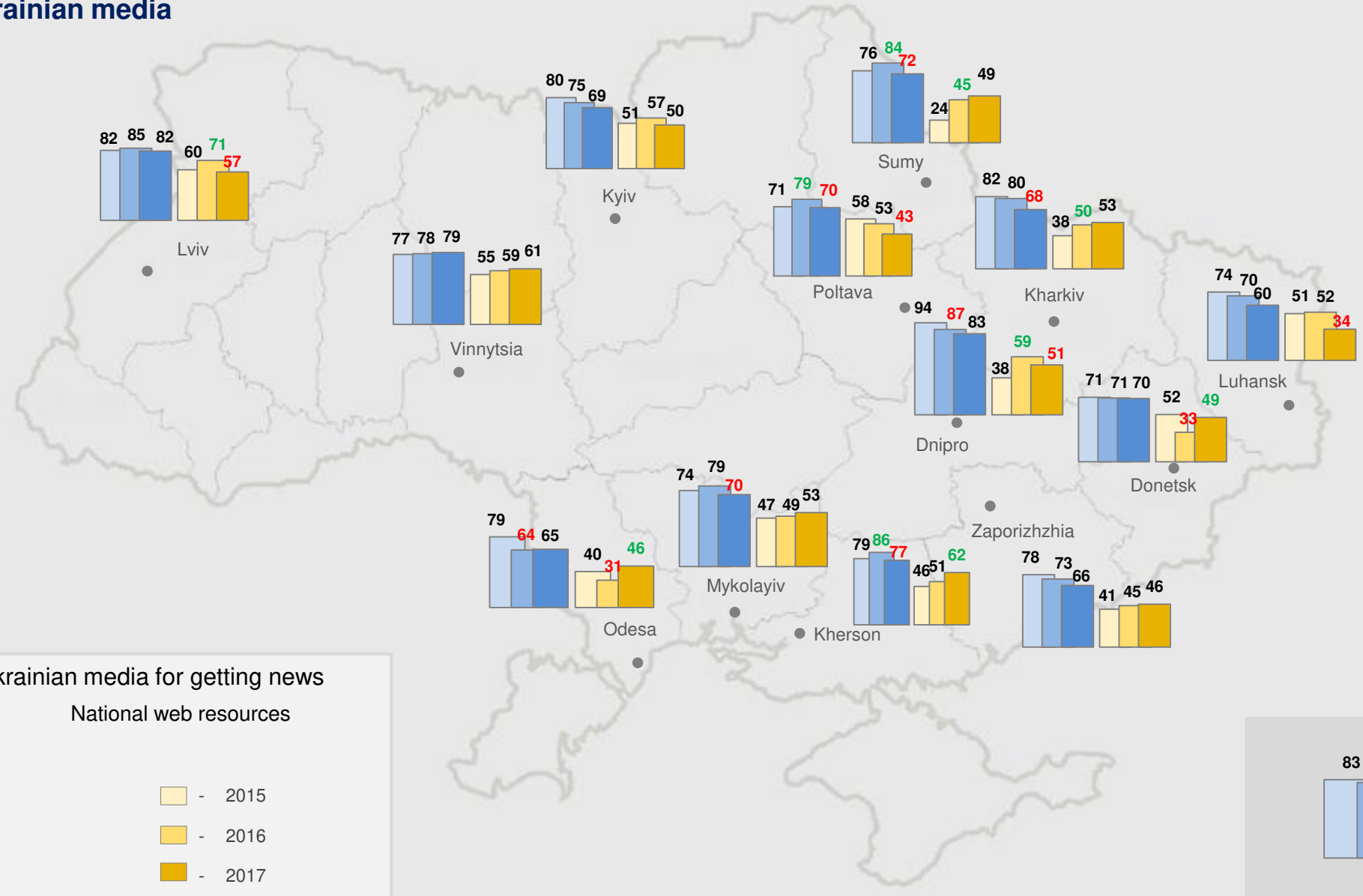


Question: Tell me how often do you use each of these media for news? (The share of those who use at least once a week)

Base: Total, N~1640/wave

x / x – Significantly more / less at 95% compared to the previous wave

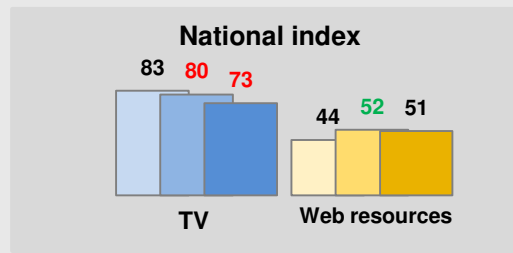
Weekly usage of Ukrainian media



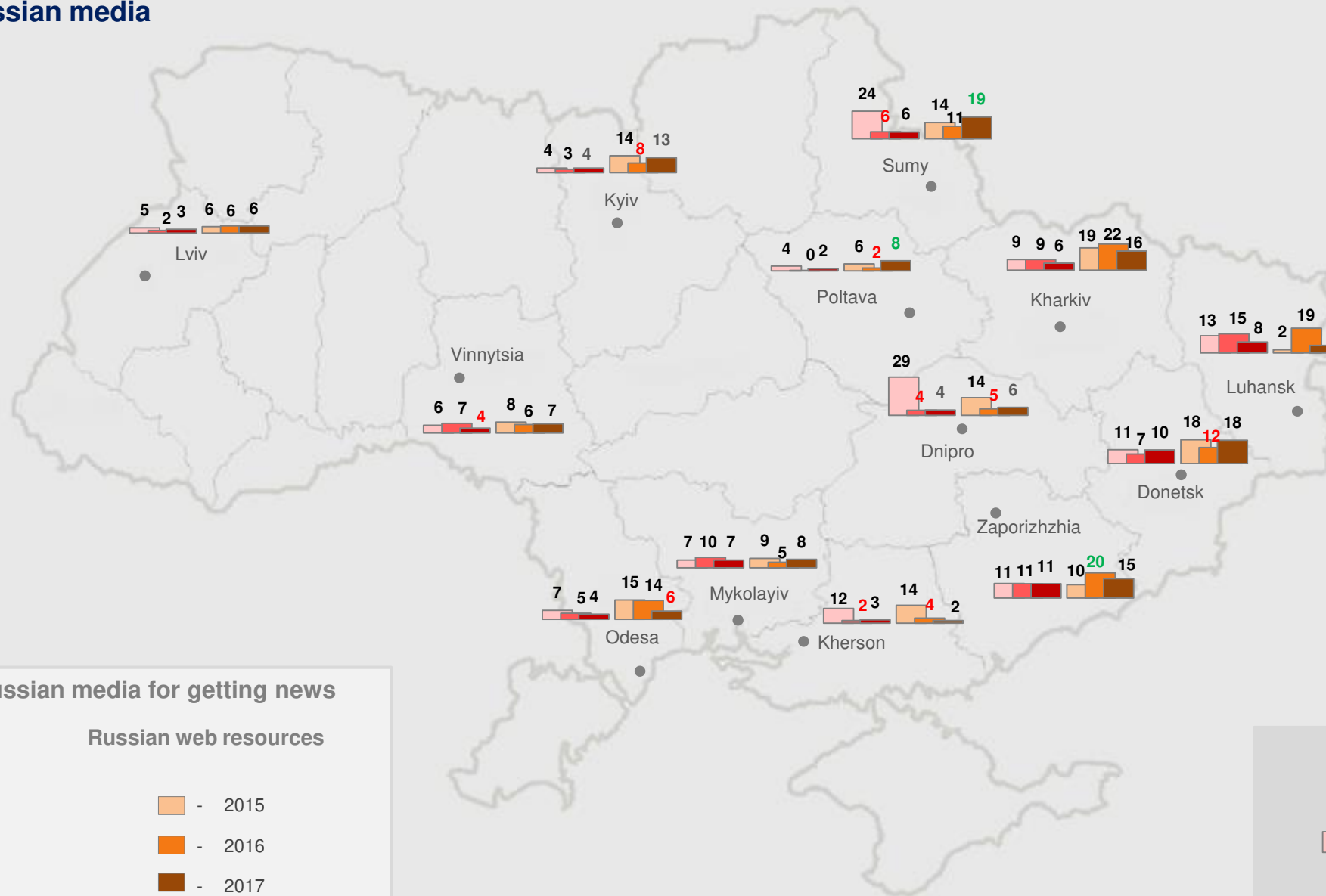
Weekly usage of Ukrainian media for getting news

National TV National web resources

■ - 2015 ■ - 2015
■ - 2016 ■ - 2016
■ - 2017 ■ - 2017



Weekly usage of Russian media



Weekly usage of Russian media for getting news

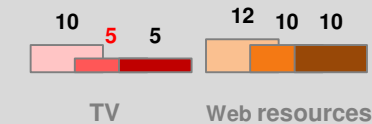
Russian TV

- - 2015
- - 2016
- - 2017

Russian web resources

- - 2015
- - 2016
- - 2017

National index



















































x / x Significantly more / less at 95% compared to the previous wave

Level of satisfaction with news presentation on TV

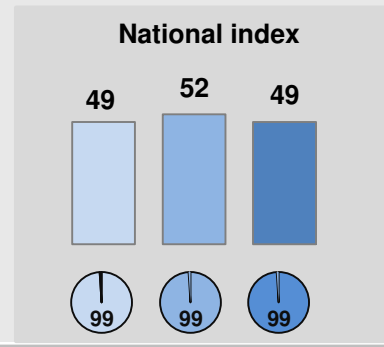
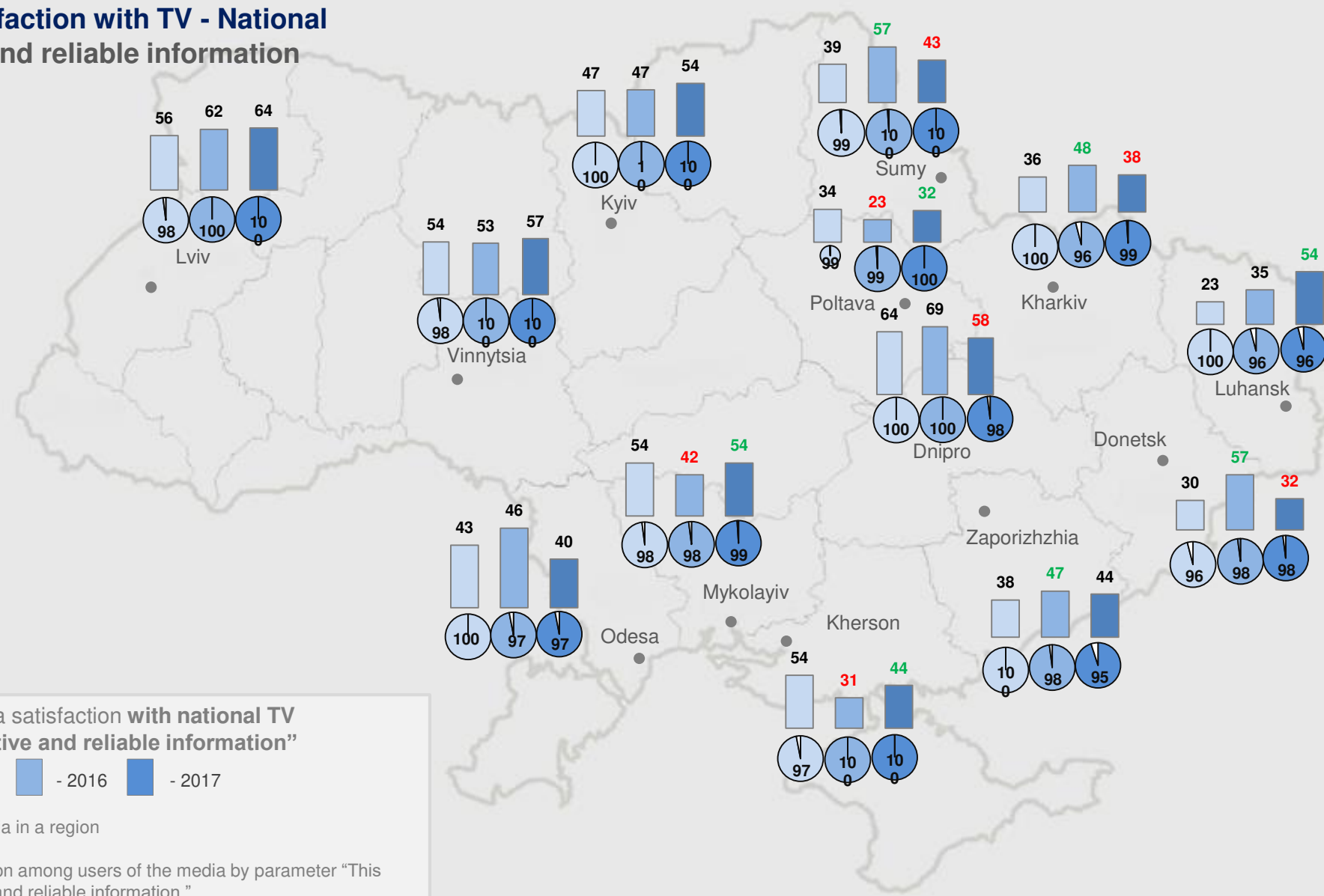
In comparison to the previous year, there has been a drop in the number of respondents confirming convenient schedules of news broadcasts on national TV channels. The level of satisfaction with the reliability of information presented on the regional TV channels has also decreased.



Satisfaction with news presentation on TV

Share of those who completely or rather agree that...		 Regional	 National	 Russian
Timing of broadcasts is convenient	2015	 71%	 76%	 48%
	2016	 73%	 77%	 49%
	2017	 72%	 73%	 53%
Information is being given promptly	2015	 65%	 70%	 40%
	2016	 68%	 72%	 48%
	2017	 68%	 72%	 54%
Information is important for me	2015	 68%	 67%	 43%
	2015	 62%	 64%	 47%
	2017	 64%	 63%	 44%
Information is full and detailed	2015	 54%	 53%	 35%
	2016	 57%	 54%	 28%
	2017	 56%	 56%	 38%
Objective and reliable information is provided	2015	 53%	 49%	 38%
	2016	 57%	 52%	 26%
	2017	 49%	 49%	 32%
Sample size (Consumers of TV news)		2015, N=605 (37% of all TA) 2016, N=597 (36% of all TA) 2017, N=496 (30% of all TA)	2015, N=1393 (85% of all TA) 2016, N=1333 (81% of all TA) 2017, N=1256 (76% of all TA)	2015, N=162 (10% of all TA) 2016, N=92 (6% of all TA) 2017, N=69 (4% of all TA)

Level of media satisfaction with TV - National Provides objective and reliable information



Level of media satisfaction with national TV
 "Gives objective and reliable information"

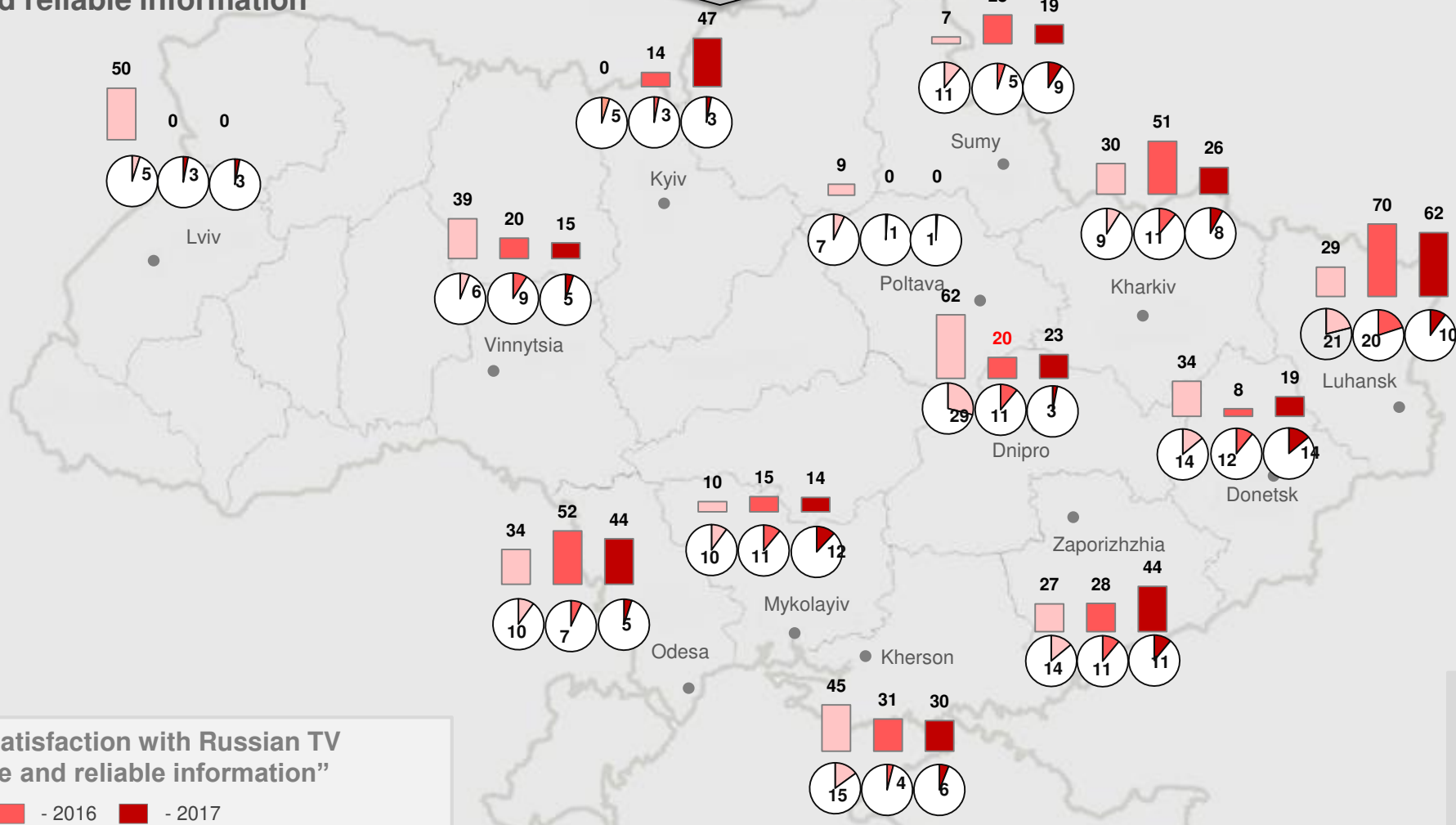
■ - 2015
 ■ - 2016
 ■ - 2017

Share of users of the media in a region
 - Level of media satisfaction among users of the media by parameter "This media provides objective and reliable information."

x / x Significantly more / less at 95% compared to the previous wave

Although, the level of satisfaction seems to be high, according to InMind, the share of those who continue to watch Russian TV is statistically insignificant and cannot be considered fully representative.

Level of media satisfaction with Russian TV
 Provides objective and reliable information



Level of media satisfaction with Russian TV
 "Gives objective and reliable information"

■ - 2015 ■ - 2016 ■ - 2017

○ - 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

38 26 32



















































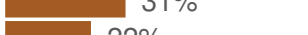


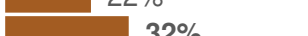


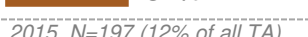
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Level of satisfaction with news presentation on the web

The level of satisfaction with national web-based/online media has decreased since last year.



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%
	2017	 86%	 83%	 74%
Easy to find information I need	2015	 81%	 82%	 59%
	2016	 80%	 81%	 63%
	2017	 80%	 77%	 65%
Provided information is timely	2015	 78%	 80%	 55%
	2016	 73%	 82%	 61%
	2017	 79%	 77%	 62%
Provided information is important for me	2015	 74%	 76%	 48%
	2016	 70%	 71%	 41%
	2017	 72%	 68%	 50%
Provided full and detailed information	2015	 63%	 68%	 37%
	2016	 60%	 70%	 32%
	2017	 61%	 64%	 49%
Provided objective and reliable information	2015	 63%	 65%	 31%
	2016	 65%	 65%	 22%
	2017	 65%	 59%	 32%
Sample size (Internet news users)		2015, N=218 (13% of all TA) 2016, N=277 (17% of all TA) 2017, N=281 (17% of all TA)	2015, N=722 (44% of all TA) 2016, N=812 (50% of all TA) 2017, N=805 (49% of all TA)	2015, N=197 (12% of all TA) 2016, N=122 (7% of all TA) 2017, N=104 (6% of all TA)

Question: Please evaluate how much you agree with the following statements about NEWS...

Base: Consumers of respective media

x / x – Significantly more / less at 95% compared to the previous wave



FOCUS GROUPS (Anecdotal): Internet websites are considered
 A MANDATORY NEWS SOURCE AMONG THE MAJORITY OF MEDIA CONSUMER GROUPS,
 notwithstanding age and region (and the main source for 18-45 Target Audience)


National websites




- **Censor.net**
- **pravda.com.ua**
- **Korrespondent.net**
- **liga.net**
- **ГУПТ**
- capital.ua
- bigmir.net
- glavred.info
- UNIAN.net
- obkom.net.ua
- 112.ua
- business.ua
- minfin.com.ua
- antikor.com.ua
- hromadske.ua
- lb.ua
- kp.ua


Foreign


- **dw.com**
- thetimes.co.uk
- nytimes.com
- telegraph.co.uk
- europa.eu
- svoboda.org

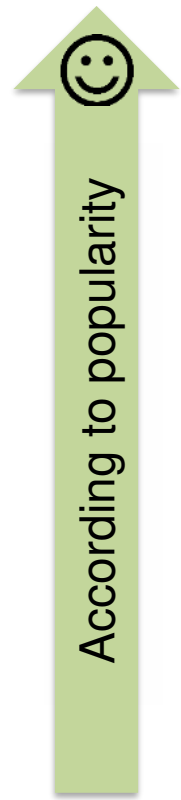
Aggregator websites

- **Ukr.net**
- **mail.ru** (less than before)
- yandex.ua


Regional websites


- dumskaya.net, 048.ua, omr.gov.ua, usionline.com, hrabro.com, forumodua.com, (Odesa)
- 6264.com.ua, informator.media (Kramatorsk)
- zakarpattia.net.ua, ar25.org, mukachevo.net, goloskarpat.info, zaxid.net (Uzhgorod)
- vgos.com.ua (Lviv)
- vn.20minut.ua (Vinnytsya)

- Also named as separate sources of information:**
- YouTube
 - A.Shariy's video blog





FOCUS GROUPS (Anecdotal): searching for and reading news on the Internet

On specific websites

THIS NEWS SEARCH METHOD IS THE MOST EFFECTIVE AND COMMON AMONG ALL CONSUMER AGE GROUPS

- Traditional and favorite internet resources are, as a rule, just a click away through bookmarks and easy-access panels. Users also subscribe to them on Facebook for easy and fast link access (they rarely type in the name on search engines).
- Most of the mentioned sources are internet versions of a certain TV-station or print media («Korrespondent», «Euronews», «Mestnyie vesti» (mv), TSN, «Hromadske» etc.)

On aggregator websites

THIS SEARCH METHOD IS MOST COMMONLY USED BY YOUNG PEOPLE

- Favorite aggregator website (usually Ukr.net) is added to bookmarks
- On the website media consumers commonly browse their favorite topics. paying attention to news headings.

Through key word searches on search engines

THIS METHOD IS USED BY ALL OLDER AND MEDIUM-AGED GROUPS

- to practice because of low computer skills (while they still can't search otherwise)
- to look for outdated information that can't be found on aggregators anymore





FOCUS GROUPS (Anecdotal): THE MOST COMMON NEWS SOURCE IS FACEBOOK
Important (foremost for the younger Target Audience (TA) advantage of social media –
You don't just read the news, you can see the public's reaction
 (read comments and leave your own reply)

Social media use

- **Facebook**
- **VK**
- **Odnoklassniki**

- Rarely:
- Twitter
 - Instagram
 - Ukrainians

- «**VKontakte**», «**Odnoklassniki**» are viewed mostly as a source of interesting information (easy access to music and theme groups – hobby, profession, education etc.) or as a communication tool.
- **Twitter** is somewhat easier when following specific celebrity feeds but in general its options are similar to Facebook.

Searching and reading news on social media

Friend feed

This method is used by the majority of respondents - they browse news links on their friends' feeds, read their posts and comments, and also respond to them with likes, shares and comments.

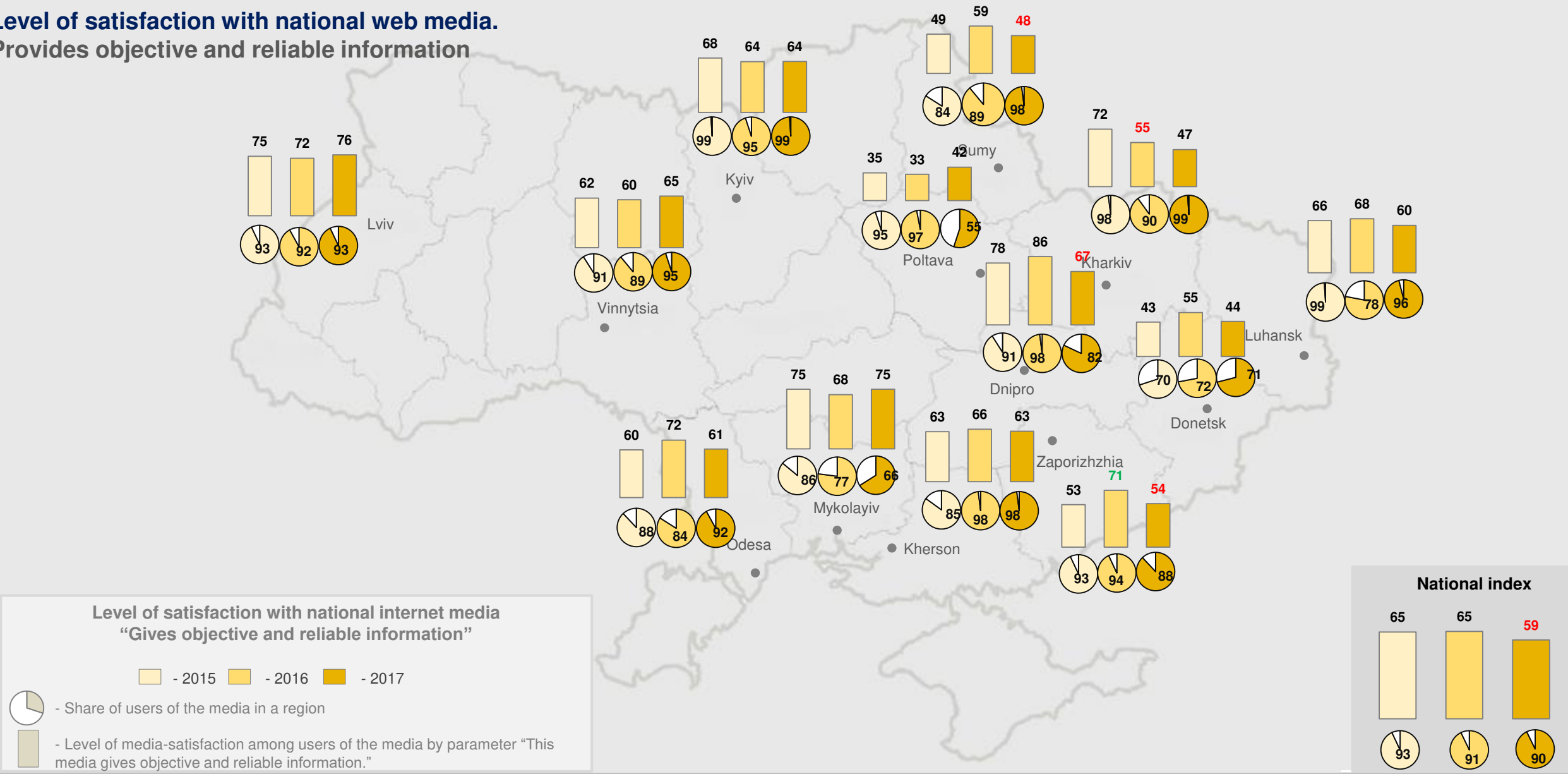
Blogger, civil and political leader pages

Group feed

- Some respondents receive information from specific group feeds they subscribe to, more often these are local news, in particular, from occupied territories (for example, in Kramatorsk, they compare local news coverage by pro-Ukrainian and separatist sources).

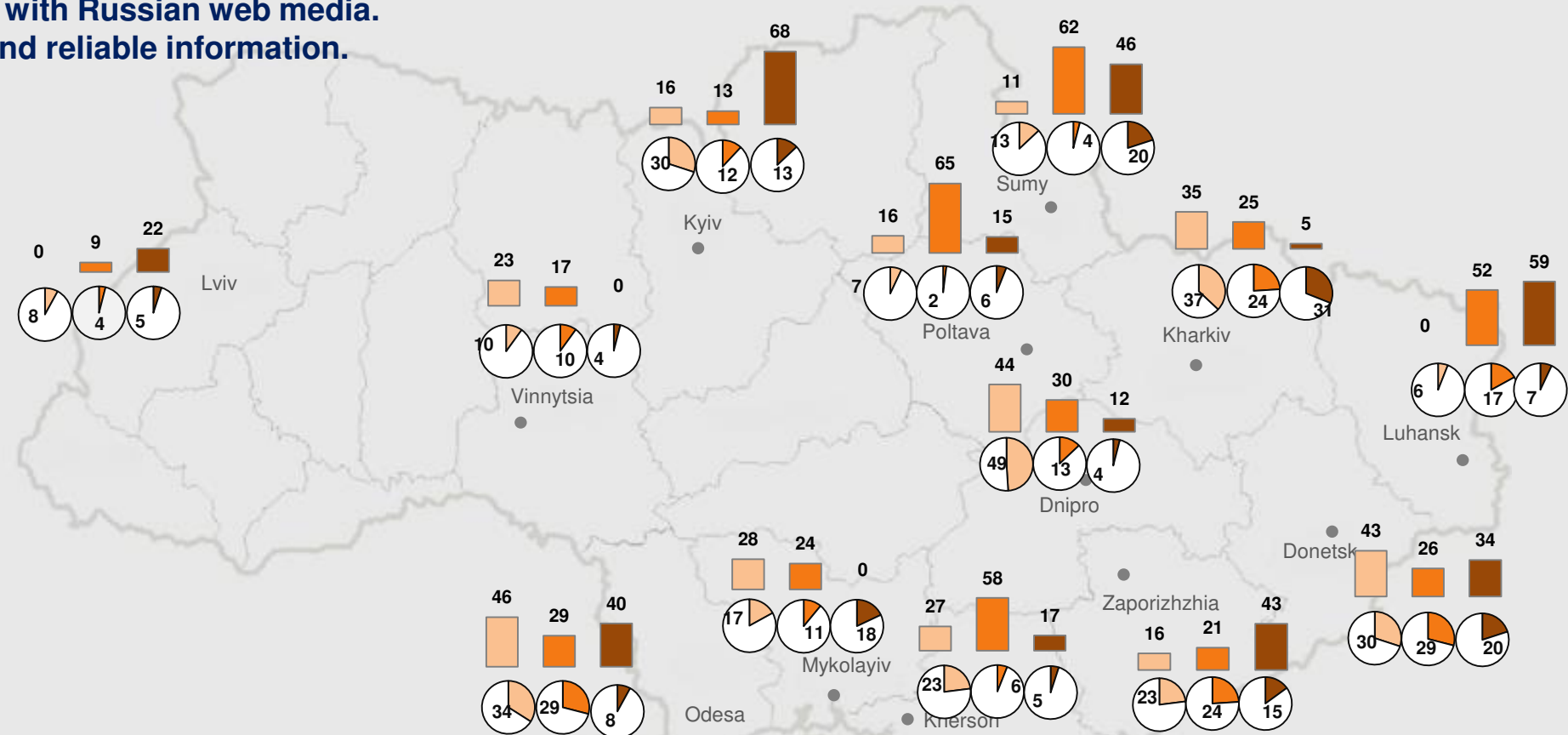
- Type of news monitoring, popular among youngest TA

Level of satisfaction with national web media.
 Provides objective and reliable information



x / x – Significantly more / less at 95% compared to the previous wave

**Level of satisfaction with Russian web media.
 Provides objective and reliable information.**



**Level of satisfaction with Russian internet media
 "Gives objective and reliable information"**

■ - 2015
 ■ - 2016
 ■ - 2017

-- 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
 ■ 32

25
 14
 12

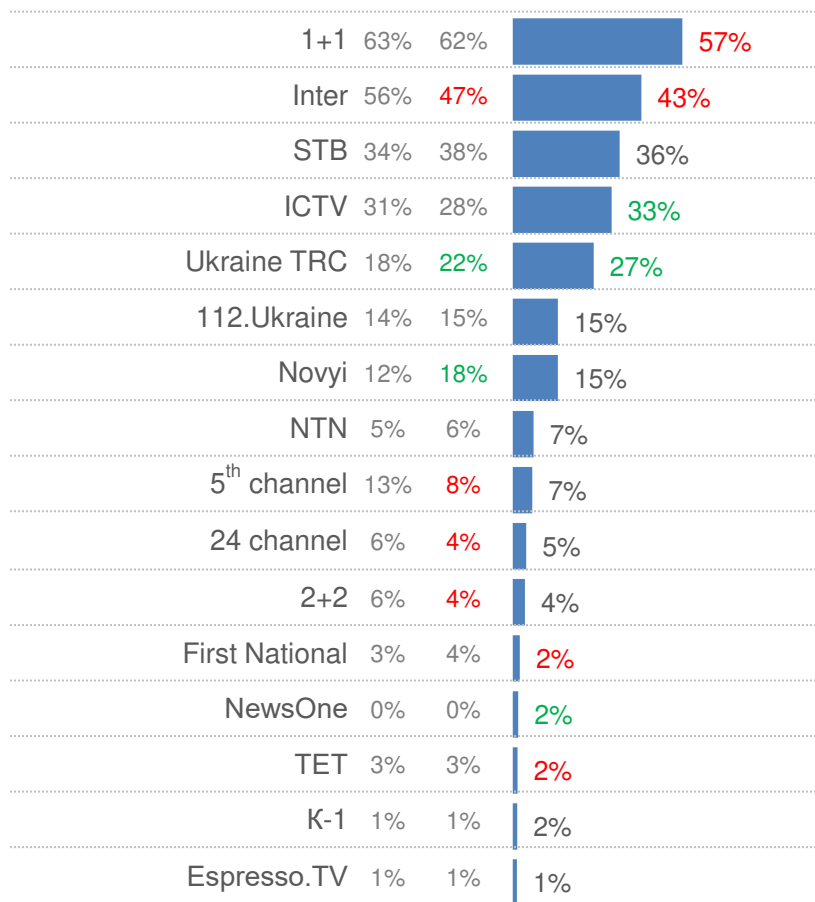
National media ratings



TV



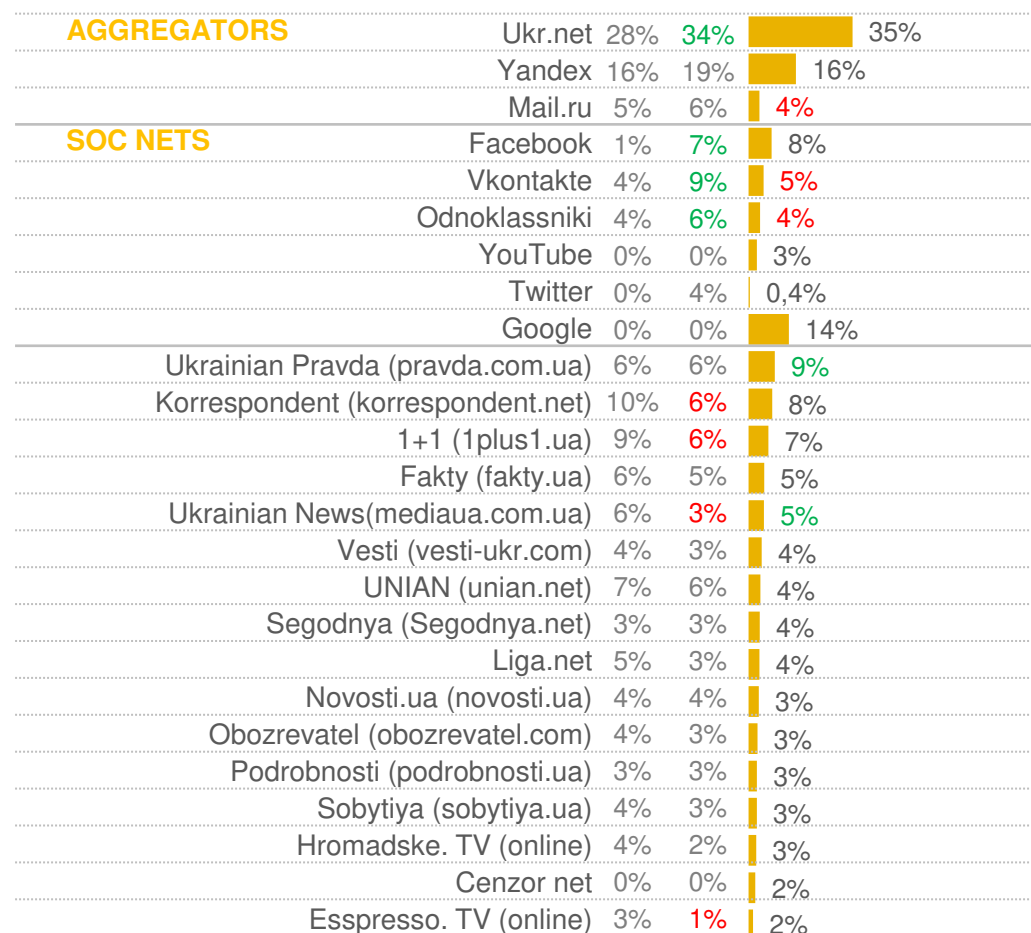
2015 2016 2017



Internet



2015 2016 2017



What are the three national TV channels whose news you see most often?

What are the three most popular sites you visit most often?

National media ratings



PRESS



2015 2016 2017

Media Outlet	2015	2016	2017
Segodnya	28%	22%	30%
Vesti	36%	13%	22%
Argumenty i Fakty (Ukraine)	20%	21%	17%
Fakty i kommentarii	14%	14%	15%
Ekspres	7%	14%	12%
Bul'var	9%	7%	6%
Zerkalo nedeli	4%	4%	4%
Komsomolskaia pravda (Ukraine)	6%	8%	4%
Ukrainian golos(magazine VRU)	2%	2%	3%
Uriadovyi kur'ier	6%	1%	3%
Den'	3%	3%	2%
Vecherniy Kiev	2%	3%	2%
Korrespondent (magazine)	2%	2%	2%



RADIO



2015 2016 2017

Radio Station	2015	2016	2017
Hit FM	21%	21%	25%
Lux FM	15%	15%	19%
Shanson	17%	18%	17%
Nashe radio	19%	16%	13%
Piatnitsa	3%	8%	12%
Avtoradio Ukraine	12%	13%	12%
Russkoe radio Ukraine	11%	10%	11%
Kiss FM	10%	6%	10%
Era FM	10%	9%	10%
Retro FM	10%	10%	9%
Melodiia	11%	12%	8%
1st NRU (UR-1, NTRCU-1)	9%	8%	8%
Radio Rocks	4%	5%	5%
Europa Plus	7%	5%	4%
Радиоточка	0%	0%	4%
Styl'ne Radio Perec FM	1%	1%	3%
Prosto radio	2%	2%	2%

What are the three national editions you read most often?

What are the three nationwide radio stations that you are listening for news most often?

Base: 2015, N=315; 2016, N=203; 2017, N=198 Consumers are a nation. Printed media
 2015, N=506; 2016, N=418; 2017, N=412 Consumers are generally national. Radio stations

x / x – Significantly more / less at 95% compared to the previous wave

Russian media ratings



TV



2015 2016 **2017**

Channel	2015	2016	2017
RTR-Planeta	25%	19%	27%
Pervyi kanal	13%	22%	26%
Rossiia 24	27%	27%	24%
NTV (NTV-Mir)	27%	24%	21%
Rossiia 1	13%	26%	19%
STS	9%	9%	16%
Dozhd'	13%	11%	10%
EuroNews (bcast in Russian)	7%	3%	8%
Pervyi kanal. Vsemirnaia set'	6%	2%	5%
REN TV	16%	8%	3%
Lifenews	5%	6%	3%
TNT	0%	0%	2%
5 channel (St. Petersburg)	7%	9%	2%



INTERNET



2015 2016 **2017**

Site	2015	2016	2017
Lenta.ru	8%	17%	19%
RBK	0%	0%	11%
Vesti.ru	9%	14%	10%
Lifenews.ru	10%	4%	7%
M24.ru	5%	3%	6%
Izvestia.ru	2%	1%	4%
Gazeta.ru	5%	2%	3%
Forbes.ru	5%	2%	3%
Mk.ru	2%	0%	3%
Kommersant.ru	3%	4%	3%
Newsru.com	3%	4%	3%
Euromag.ru	1%	1%	2%
Utro.ru	1%	2%	2%

What is the name of the three Russian TV channels you watch for news most often?

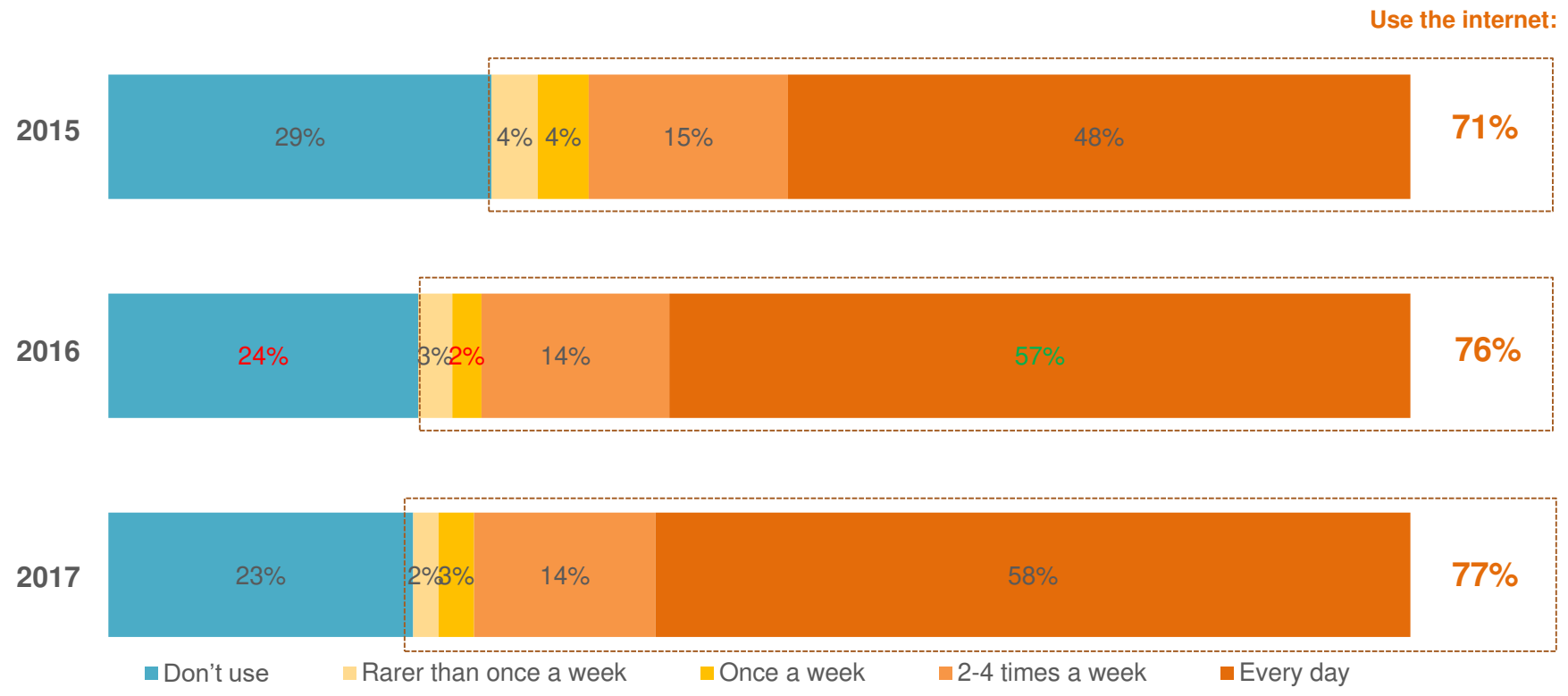
What is the name of the three Russian news sites that you visit most often?

Base: 2015, N=162; 2016, N=92; 2017, N=69, Consumers of Russian TV channels
 2015, N=198; 2016, N=122; 2017, N=104, Consumers of Russian Internet sites

x / x – Significantly more / less at 95% compared to the previous wave

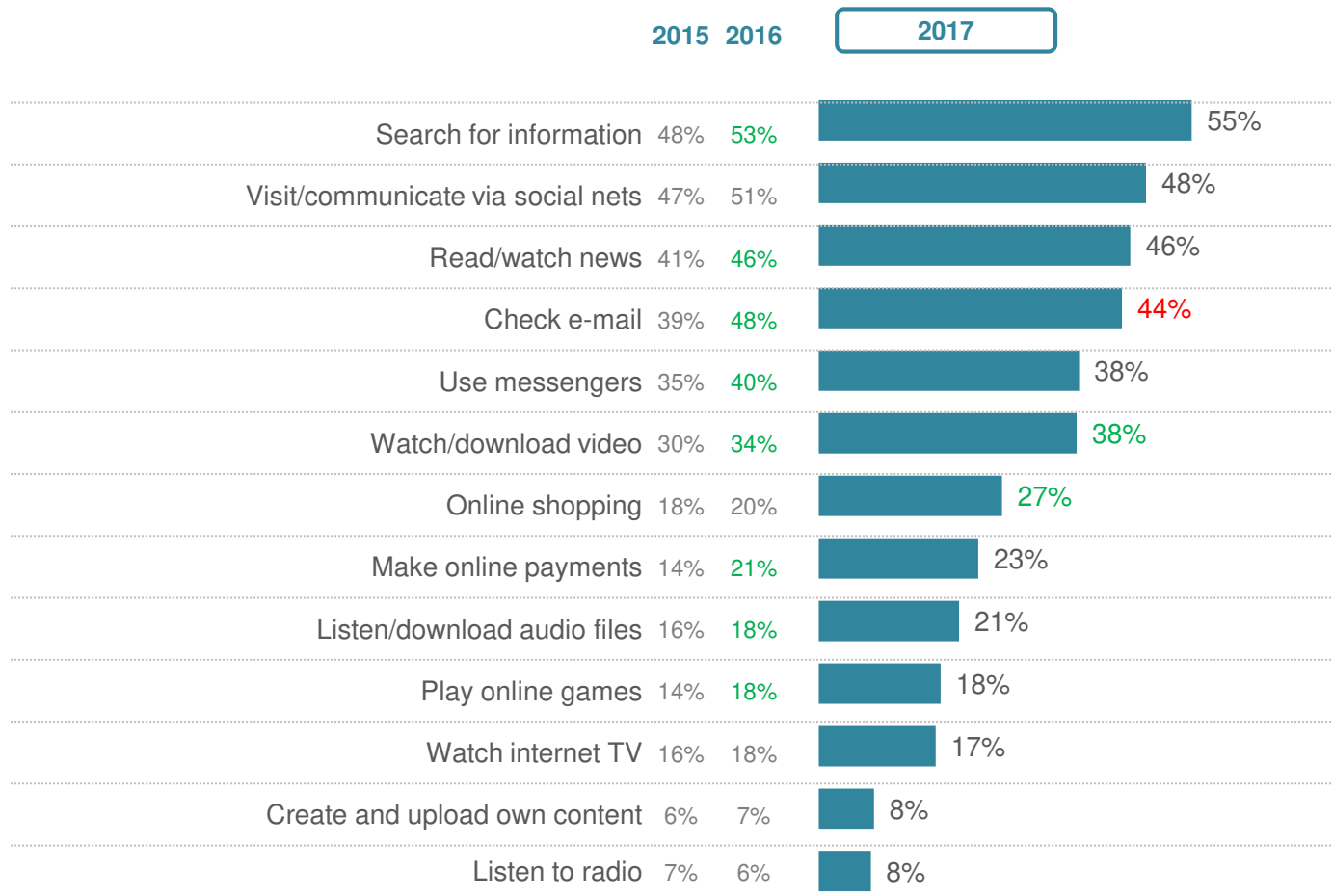
Internet use

The share of internet users has not changed since last year; nearly all respondents actively use internet at least once a week.



Purpose of internet use

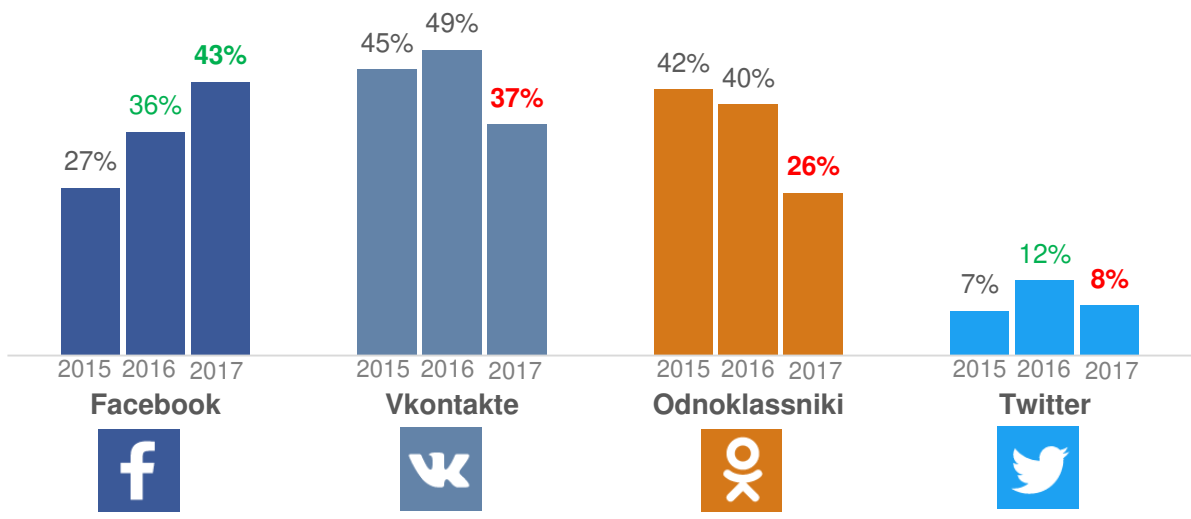
Most internet users search for information. In comparison with the previous year's findings, there has been a decrease in the share of respondents regularly using the internet to check email and an increase in the number of people watching videos and shopping online.



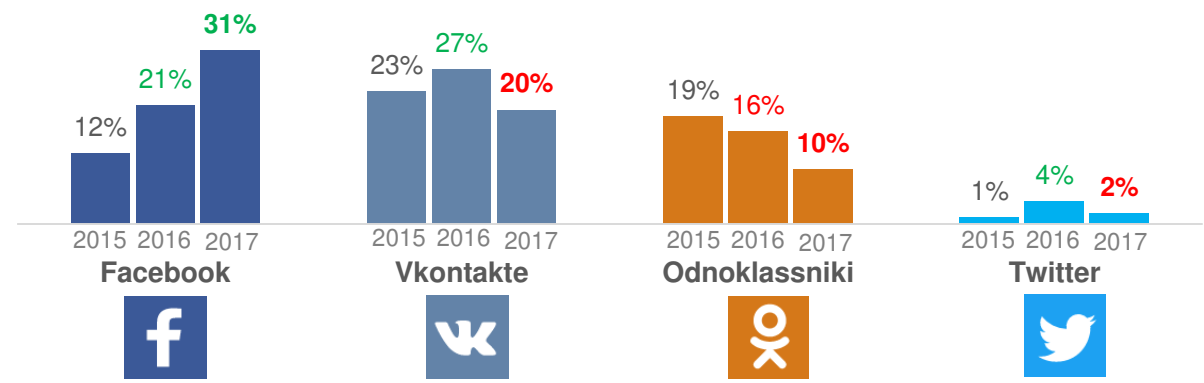
Social networks usage

Perhaps partly due to the restriction of access to a number of popular Russian online sources in Ukraine, the share of the Russian social network audience has decreased significantly – including Odnoklassniki and Vkontakte. Twitter has also lost audience. There has also been a drop in the share of people using these networks for news. Meanwhile, the Facebook audience has increased considerably.

Social network usage generally 2015-2017



Use of social networks to get news 2015-2017



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

x / x – Significantly more / less at 95% compared to the previous wave

FOCUS GROUPS (Anecdotal): attitude towards Russian website ban of May 2017



Negative

Attitude

- A considerable number of those surveyed in Kharkiv and Kyiv (around 2/3) and several respondents in Kramatorsk and Vinnytsya are against this ban, sometimes categorically («they won't achieve anything, it's just annoying»)

Arguments

- Personal discomfort (loss of access to handy options and traditional interest groups).
- Loss of family ties and social interaction (loss of contact with friends in Russia and Crimea, perceived as a ban on interacting with relatives).
- Undemocratic (perceived as an attack on freedom of speech and a restriction of constitutional rights).
- Financial losses. Loss of followers gained by spending money on advertising.
- Illogical (don't understand the motivation behind the ban).

Usage practices

- All those interested (even in the oldest TA) have found ways to bypass their social media blockade and continue to use them (but not as often, because the programs are inconvenient and take a long time to download).
- Were forced to stop using any social media due to the technical complexity of the registration procedure and other resources.

Neutral or positive

- Other respondents are indifferent to the ban on Russian social media. It has had no impact on their personal comfort.

- Russian social media were never a news source and were used solely for entertainment and communication.
- The VKontakte consumer TA was always limited to a certain age (mainly teenagers, school kids).

- A smaller percentage of consumers after the ban has no problem with using just Facebook (in Odesa, Uzhgorod, some – in Melitopol).
- It's inconvenient and/or dangerous to bypass the blockade.

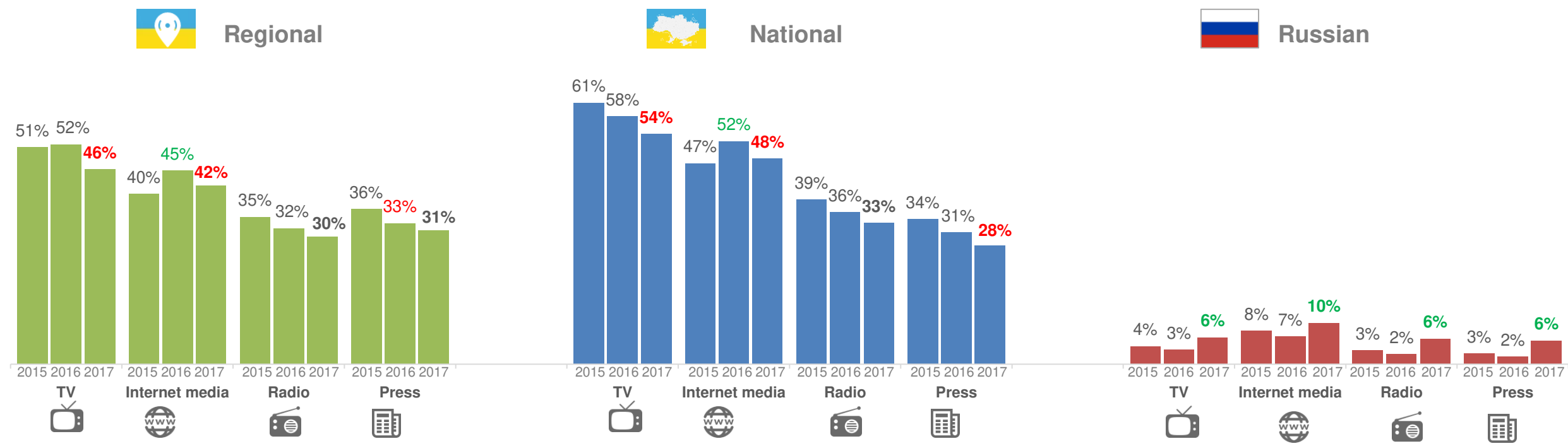


TRUST IN MEDIA

Level of trust in news in media

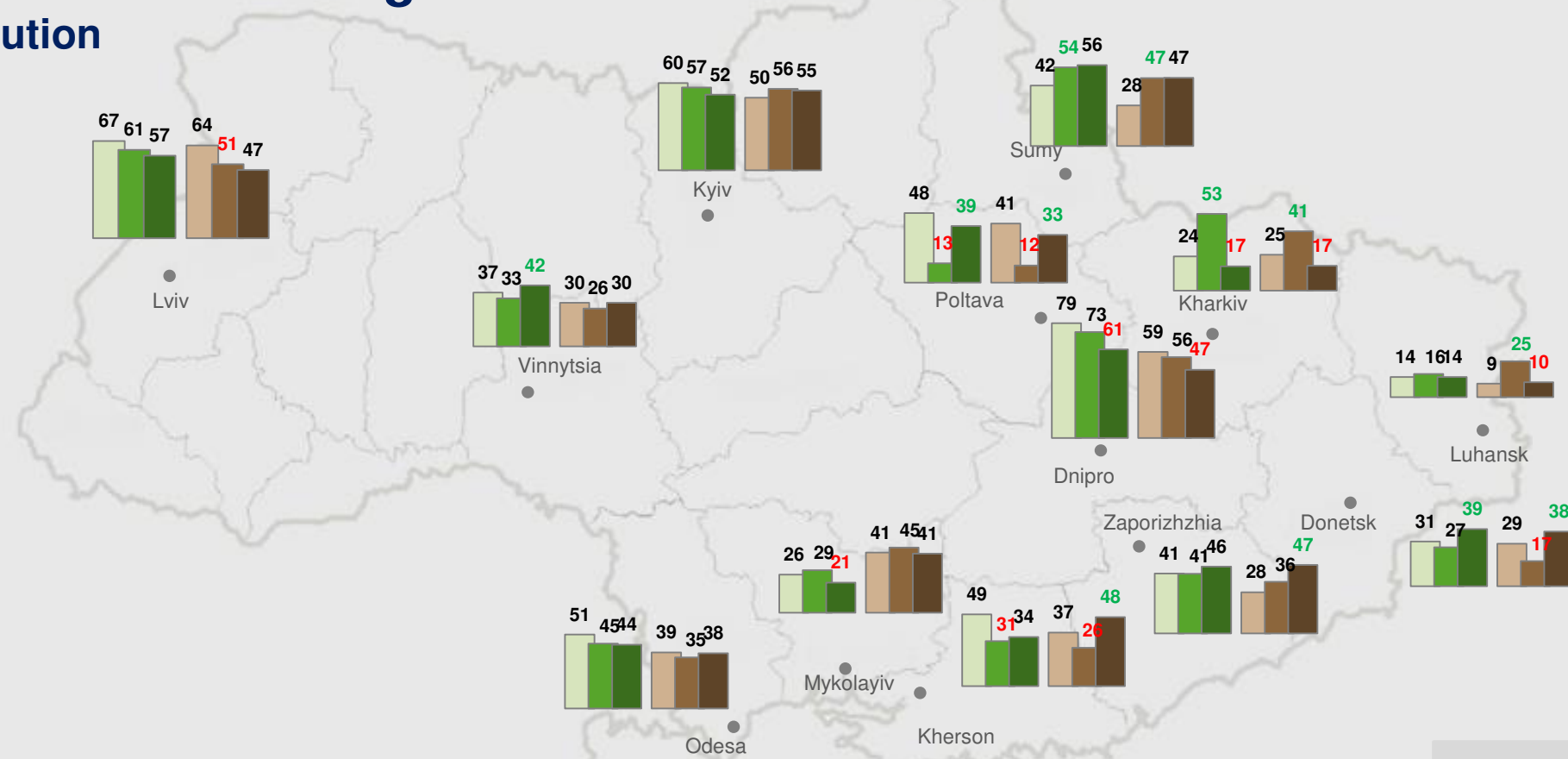
Respondents trust Ukrainian media sources exclusively. The levels of trust in regional and national TV channels, as well as Internet media, have decreased since last year, however. The positions of Ukrainian radio and print media continue to weaken. The level of trust in Russian mass media has slightly increased in some categories, but the sample size is small.

Trust in media, 2015-2017



Level of trust in news in regional media

Regional distribution



Level of trust in the media

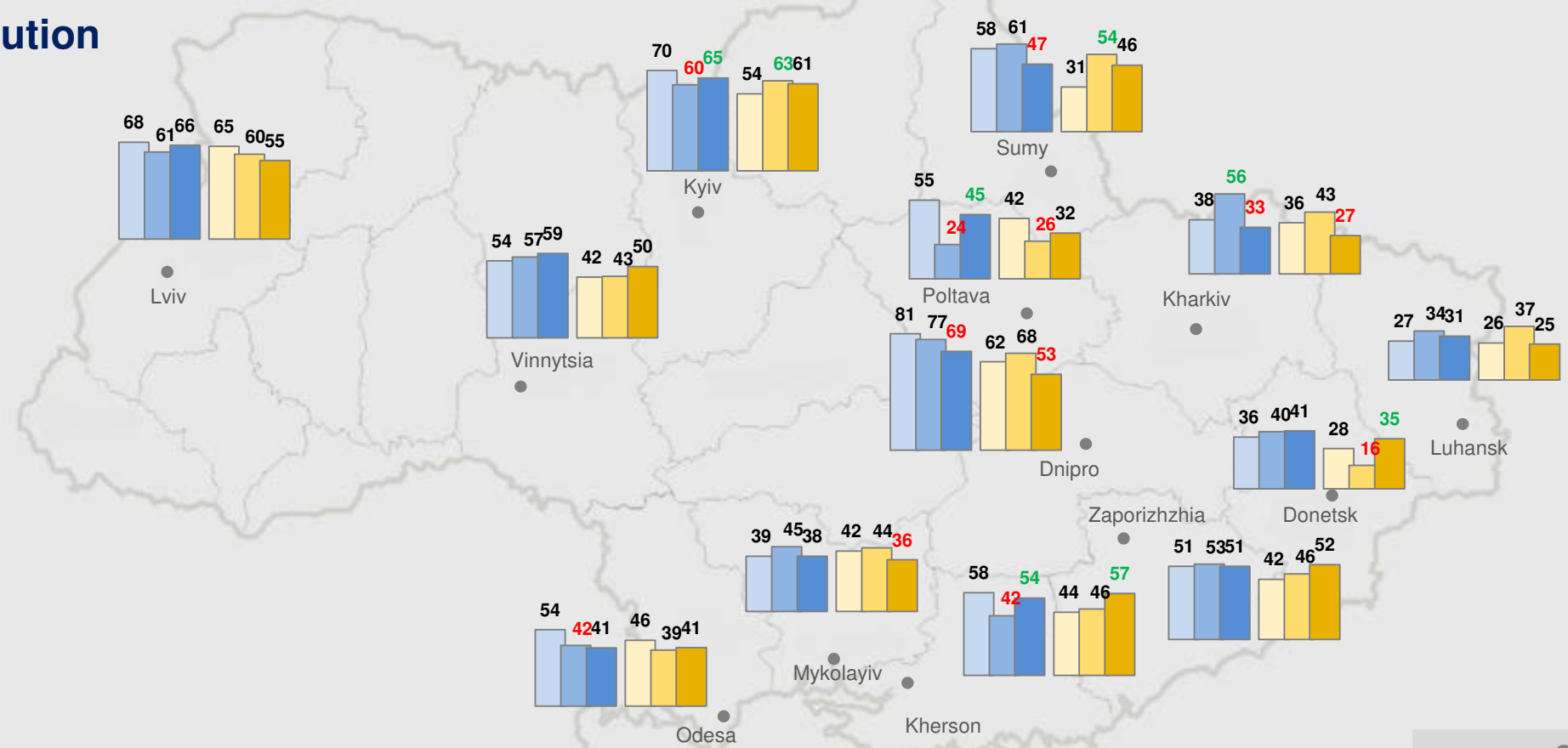
Regional TV	Regional web resources
■ - 2015	■ - 2015
■ - 2016	■ - 2016
■ - 2017	■ - 2017

General index
 (considering each region's weight)

■ 51	■ 52	■ 46	■ 40	■ 45	■ 42
TV			Web resources		

Level of trust in news in national Ukrainian media

Regional distribution



Level of trust in the media

National TV	National web resources
- 2015	- 2015
- 2016	- 2016
- 2017	- 2017

General index

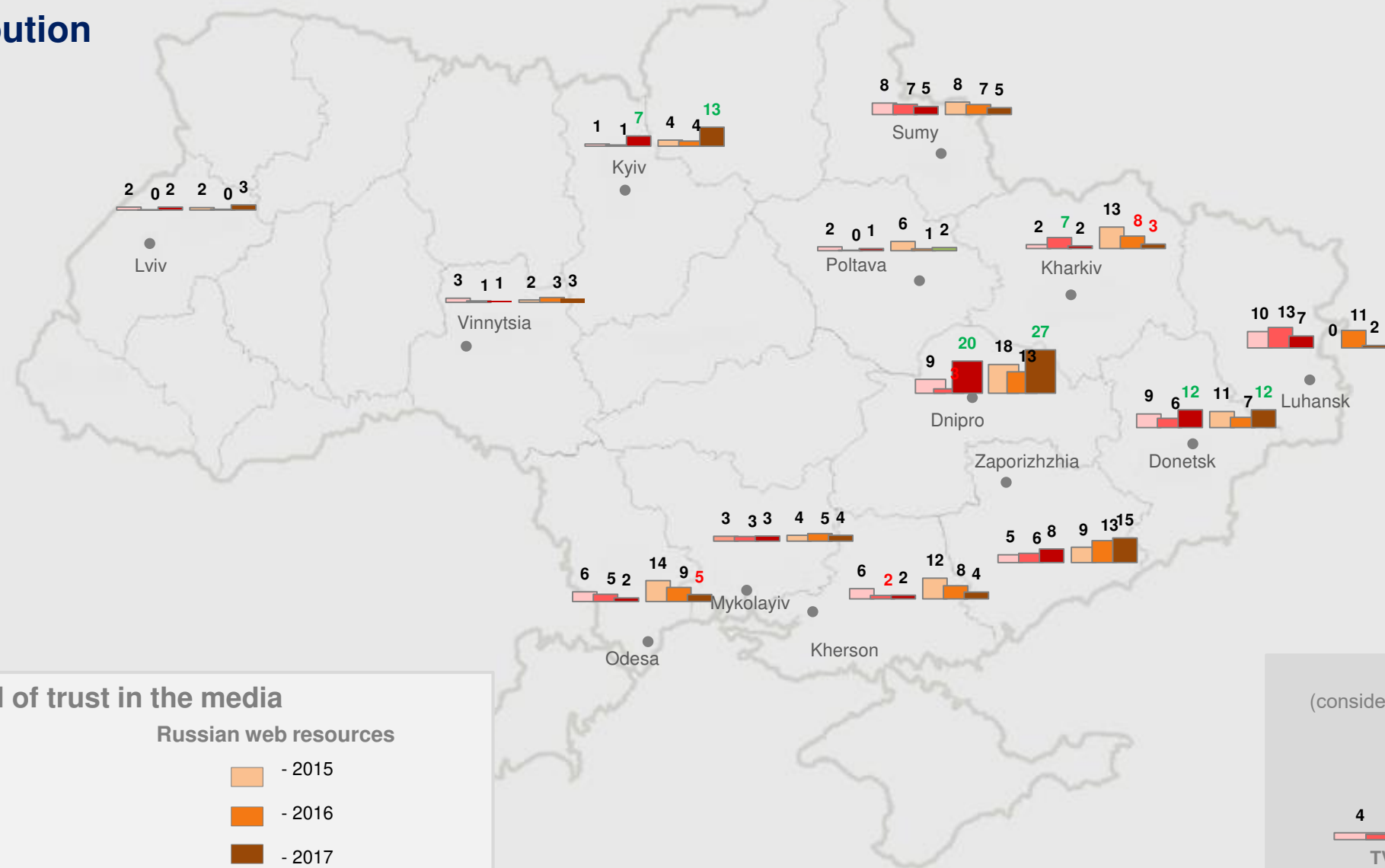
(considering each region's weight)

61	58	54	47	52	48
TV			Web resources		

x / x – Significantly more / less at 95% compared to the previous wave

Level of trust in news in Russian media

Regional distribution



Level of trust in the media

Russian TV	Russian web resources
■ - 2015	■ - 2015
■ - 2016	■ - 2016
■ - 2017	■ - 2017

General index
 (considering each region's weight)

■ 4	■ 3	■ 6	■ 8	■ 7	■ 10
TV			Web resources		

x / x Significantly more / less at 95% compared to the previous wave



MEDIA COMPETENCE

Demands of news

Similar to 2016, credibility and reliability remain the main requirements for news

Main demands of the news

2015 - 2017



FOCUS GROUPS (Anecdotal): What media users expect from media



Number of mentions

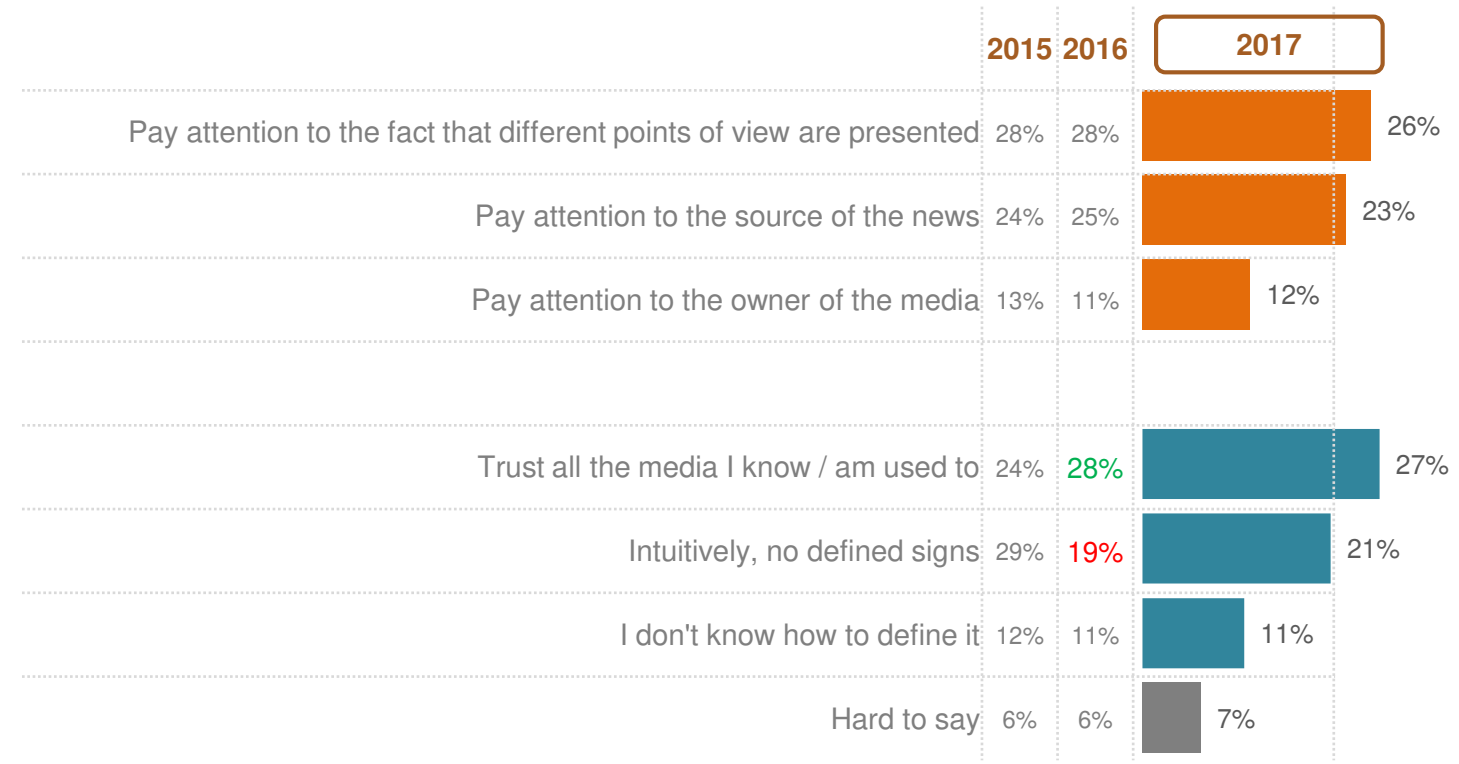
- **More independence** («Less PR», «incorruptibility», «shouldn't be bought»).
- **Objectivity/honesty, adherence to principles** – truthful information, different points of view («should have moral principles»)
- **Professionalism** – adopting European and American experience, entrusting the news to professionals («don't use students who work part-time», «learn the profession»).
- **Covering important changes in the country**, for example, reforms, **centering on the practical side** – interviews and comments by practical experts (doctors, teachers, etc. depending on the topic of reform).
- **Topic variety.** Decrease in the number of political news and increase in the number of news on international affairs, economics and science.
- **Prolongued and finished** important **pieces**/news (especially on corruption).
- **Boldness** («journalists shouldn't be afraid»).
- **Interesting news presentation.**
- **New interesting studio guests.**
- **More live coverage featuring average citizens.**

Signs of reliable information

As in previous years, both reliability of the news source and a balance of viewpoints presented in the material remain the key criteria for information credibility. A rather high share of respondents trust their favorite media channels.

What signs do you look for to decide if information in media should be trusted?

2015-2017



Focus Groups (Anecdotal): Factors affecting trust in news

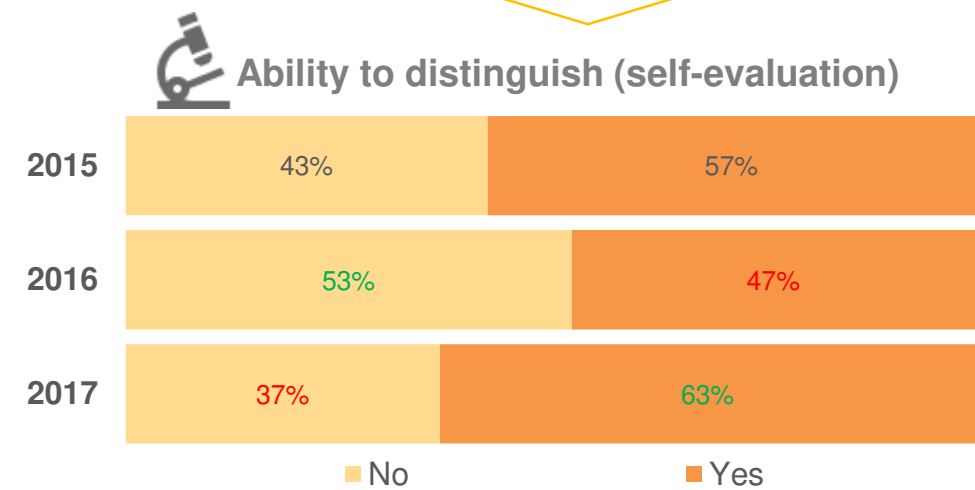
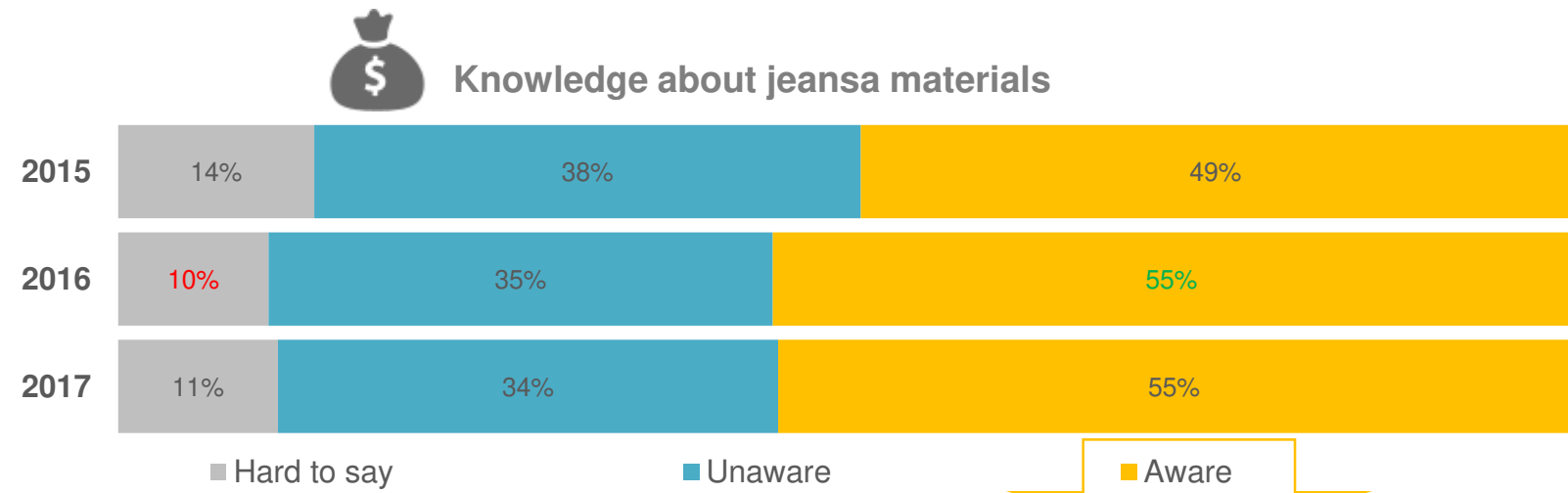


Number of mentions

- **Knowledge of the media** (to reputable sources trust is higher, while those caught with fraud or manipulation are being ignored)
- **Trust to author** (to a journalist of newsroom team of channel or website)
- **Media ownership information** (information about the owner)
- **Confirmation from other sources** (by foreign media or witnesses)
- **Objectivity/lack of bias/emotional neutrality** («*the more hysterical title – the less trust*»)
- **Preciseness and/or reality of given facts**
- Special trust given to **streams** (youngest TA)

Jeansa. Awareness, ability to distinguish

The share of respondents aware of the existence of sponsored media materials has not changed since last year - 55%. At the same time, there has been an increase in the number of respondents knowing about sponsored materials and sure of their own ability to track such materials in the informational flow.



FOCUS GROUPS (Anecdotal): Awareness of jeansa

Awareness

- **All respondents know/have heard of the existence of ordered pieces**
- Only some (predominantly within the youngest TA) are familiar with the term “dzhynsa”, the rest use a synonymous wording, “zakazukha”.

Prevalance

- According to estimates by media consumers from different regions, the volume of purchased media pieces is quite high and they can be found in media very often («a bundle», «it's all dzhynsa»).

Distribution channels

- Among the typical dzhynsa distribution channels they mention **TV** (foremost, “UKRAINA” TV station, **some** – “Inter”, STB) and **print media** (for instance, the paper “**Vesti**”).
- Respondents do not rule out the possibility of ordered pieces being spread via the internet.

Understanding the phenomena

Spontaneously most media consumers **DO NOT DISTINGUISH BETWEEN THE TERMS “DZHYNSA” AND FAKE**: when picking out sponsored news pieces, they often marked pieces and fragments with dubious content as “dzhynsa” .

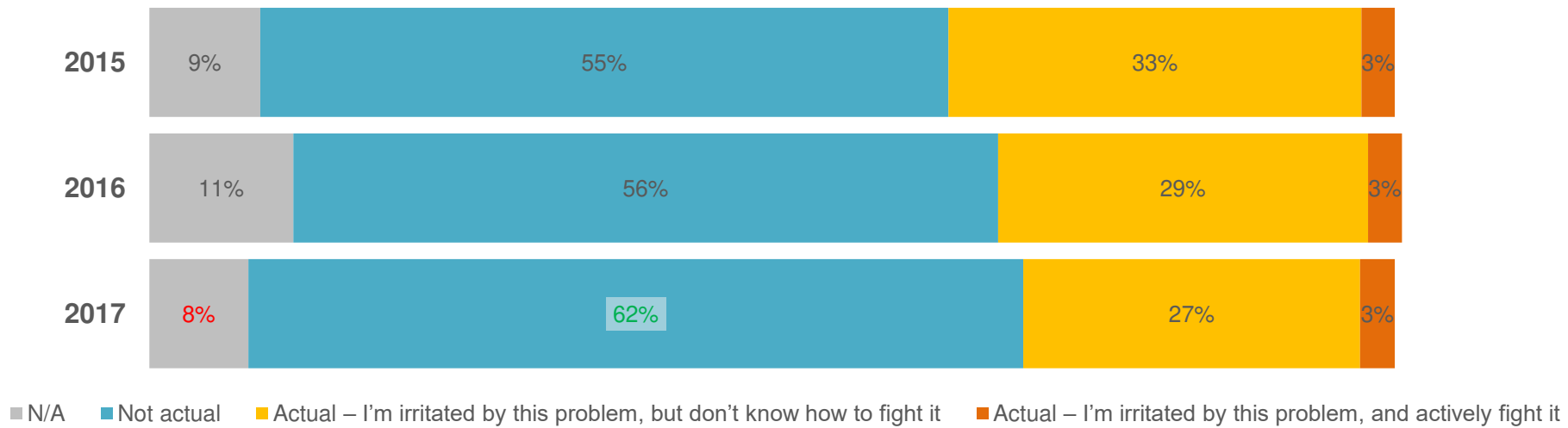
During discussions the respondents **described these media phenomena** in the following manner: a **“fake”** has a short-term but powerful effect (to scare, spread panic), while **”dzhynsa”** is intended to have a long-lasting influence («*thought virus*»).

Certain consumers (*Kharkiv, Kramatorsk*) say that **“dzhynsa” can be both political and commercial**, related to ordinary goods/services (for example, drugs) or promote certain charity foundations or events (this type of “dzhynsa”, the respondents stress, can actually benefit society).

Jeansa - relevancy

In comparison to the previous year, the population considers the issue of sponsored media materials to be less important. The number of respondents indifferent to “paid journalism” increased to 62% versus 56% last year.

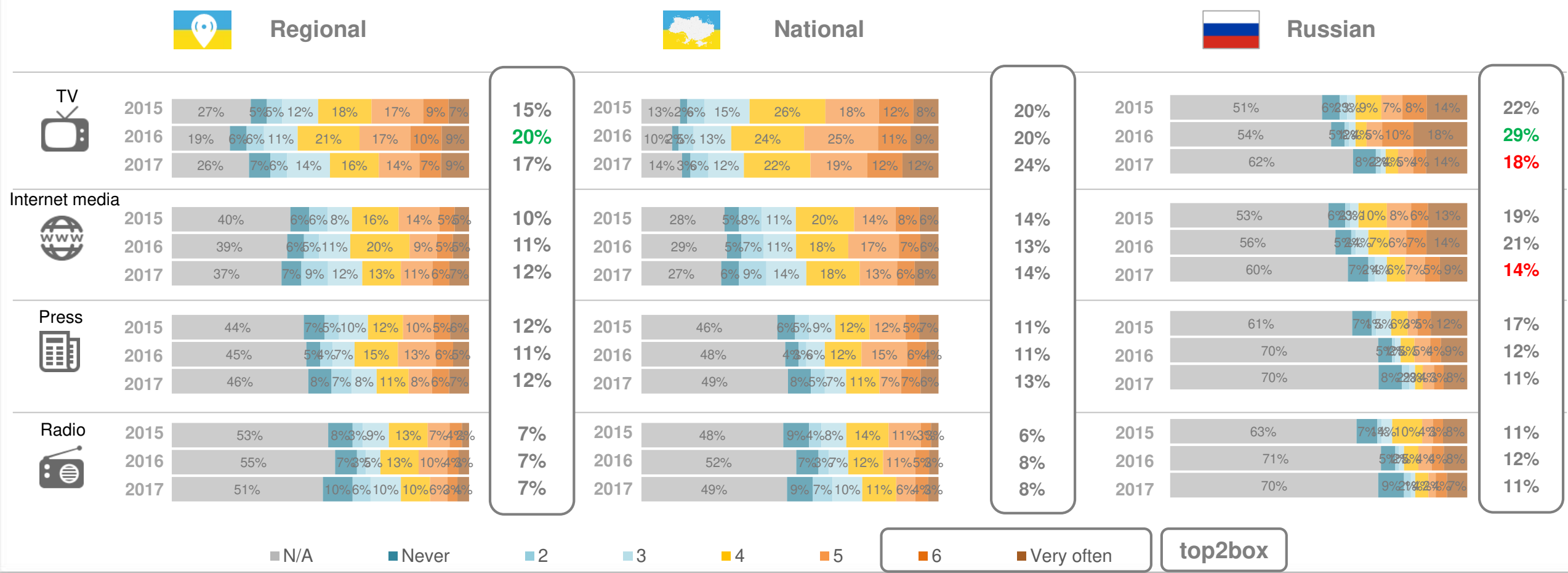
Relevancy of jeansa problem
 2015-2017



Jeansa. Estimation of the frequency of placement

Television is consistently perceived as the main source of sponsored media materials. According to respondents declaring being able to detect “sponsored” materials, this type of information was rarely presented by Russian TV and web-based media channels last year.

Estimation of the jeansa frequency, 2015-2017



Question: How often do you encounter custom / paid materials in ...? Scores from 1 (never) to 7 (very often)

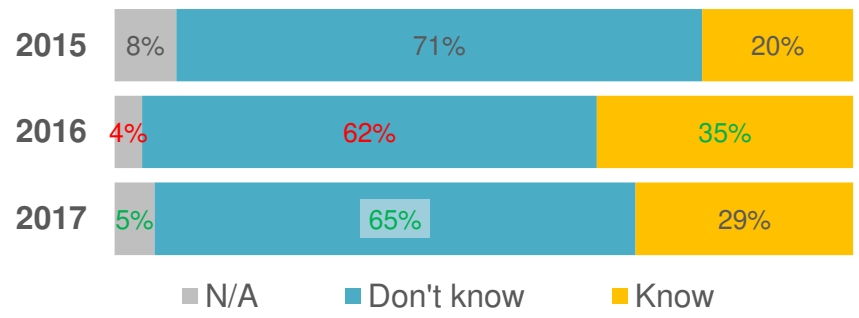
Base: Those distinguishing paid materials
 N~460 / 427 / 565

x / x – Significantly more / less at 95% compared to the previous wave

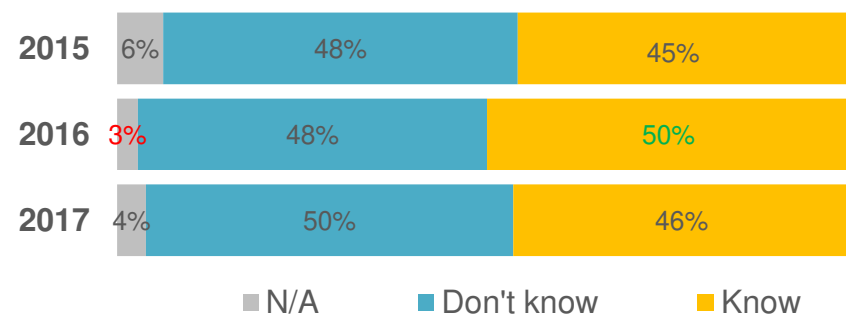
Attitude to media owners

In comparison with last year, there has been an increase in the share of respondents knowing their regional media owners. The number of people saying knowing the names of media owners is not important has also increased.

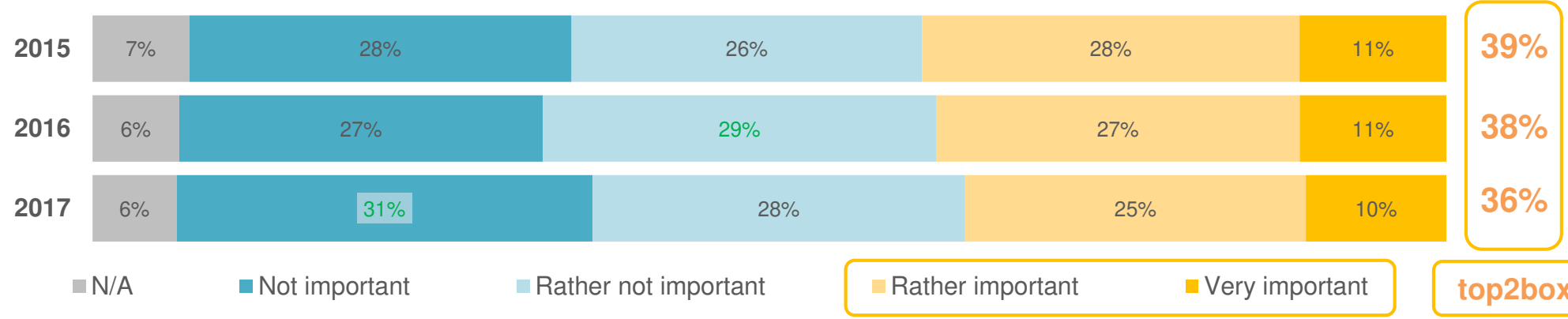
Awareness of owners of local media



Awareness of owners of national TV channels



Importance of knowing the media owner



Question: 1. How important is it for you to know who owns the media?
 2. Do you know who is the owner of the regional media that you regularly read / watch / listen to? Do you know who owns national TV channels?

Base: Total, N~1640/wave

x / x – Significantly more / less at 95% compared to the previous wave

FOCUS GROUPS (Anecdotal):The majority of respondents SPONTANEOUSLY NOTE THE PROBLEM OF MEDIA BIAS, their clear dependence on the owners
THE OWNER'S INFLUENCE IS MOST NOTABLE at “UKRAINA” TV station, less at “1+1”

The link between the owner and media content is visible through the «general line» – a systematic biased coverage of certain topics and news, when the same fact is presented in different ways by different media (through pressure, censorship)

Aim and signs of influence

- **Obvious self-advertisement** (showing the owner in a better light, as a benefactor, promoting his business)
- **Competitor anti-advertising** (their constant criticism)
- **Reputation “whitewashing”** (especially noticeable with R.Akhmetov and I.Kolomoysky)

Main mechanisms of influence

SELECTIVE NEWS PRESENTATION, in particular, **exclusion of disadvantageous information** («filtering what they show and what they don't show», «the owner will never allow his station to throw dirt at him»).

- **ACCESS TO AIR-TIME and the number of appearances of certain personalities on the air** («it's like a store freezer: if it's Coca-Cola's, you can't put any other soft drink in there.»)

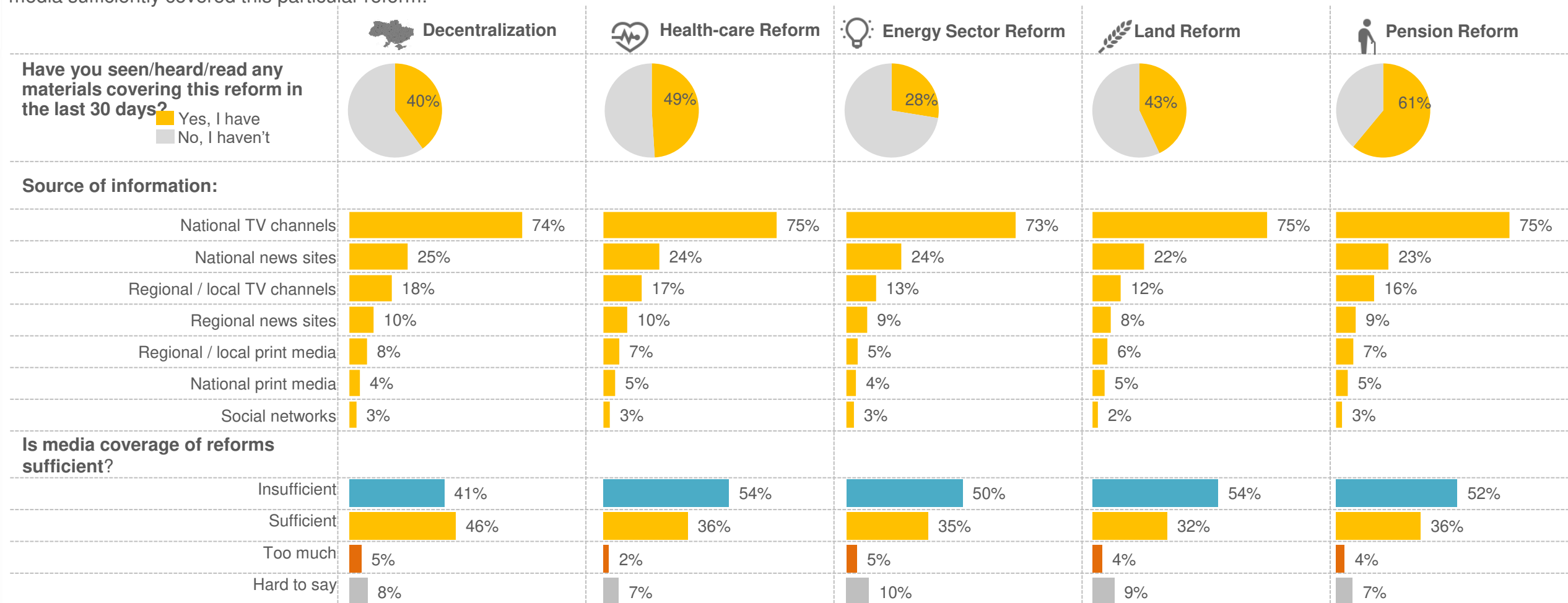
Some respondents note the high entertainment value of the mudslinging in the media: competitors batter each other on their TV stations



REFORMS

Awareness of Reforms

Respondents demonstrated the highest level of awareness about pension and healthcare reforms. National TV channels constitute the primary source of information about these reforms. The majority of respondents aware of reforms believed that media coverage of all reforms except decentralization reform was insufficient - 46% of respondents said the media sufficiently covered this particular reform.



Social and demographic profile of those informed about reforms

Young people are less informed about reforms

			Decentralization of power	Healthcare	Energy sector reform	Land reform	Pension reform
		Overall sample					
			Base: Have you encountered publications on reform				
		N=1650	N=661	N=815	N=457	N=714	N=1009
Sex	Men	47%	48%	45%	50%	47%	43%
	Women	53%	52%	55%	50%	53%	57%
Age	18-25	14%	10%	9%	8%	9%	10%
	26-35	27%	25%	23%	22%	23%	22%
	36-45	22%	23%	23%	24%	23%	23%
	46-54	19%	21%	23%	23%	24%	23%
	55-65	18%	22%	22%	22%	21%	22%
Education	Incomplete secondary	1%	1%	1%	1%	1%	1%
	Complete secondary	14%	10%	12%	10%	12%	13%
	Special secondary	43%	42%	41%	42%	42%	44%
	Incomplete higher	5%	5%	5%	5%	5%	4%
	Higher	37%	42%	42%	43%	39%	38%

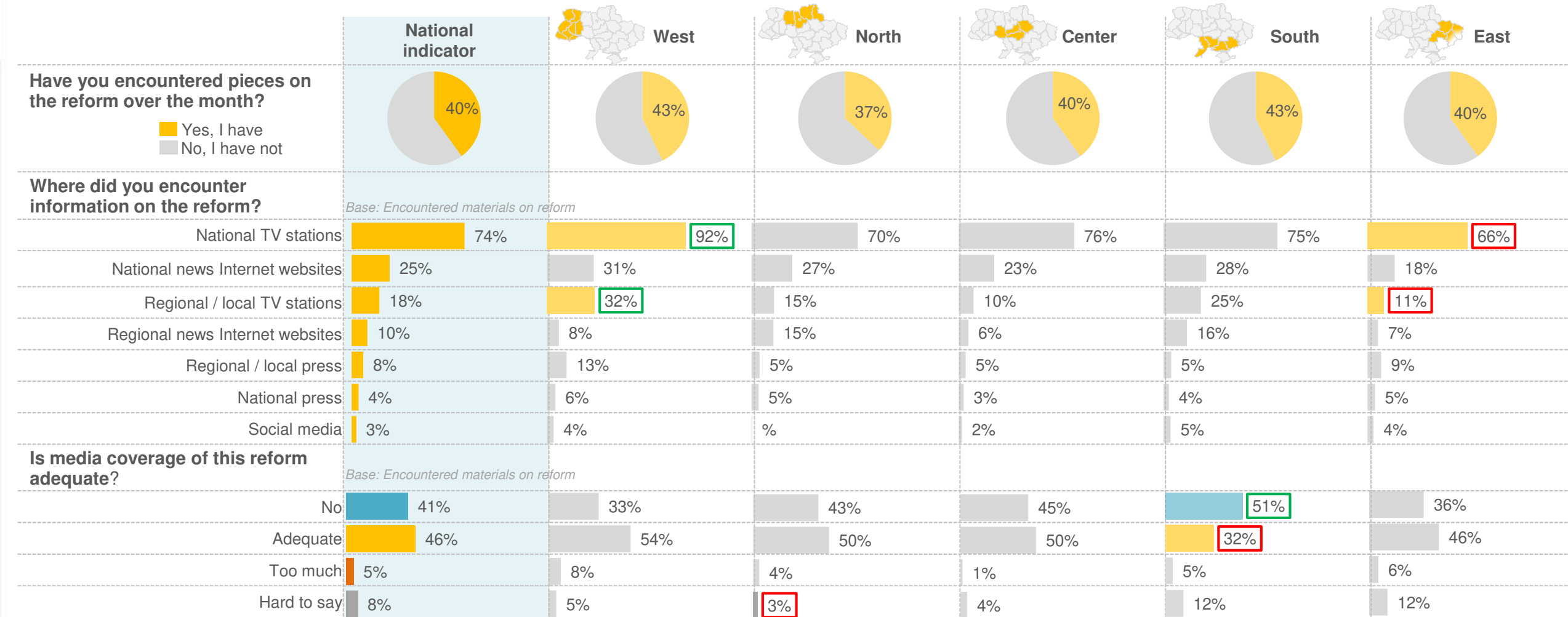
Significantly more / less at 95% compared to the general sample division

Question: Have you encountered publications or TV pieces on these reforms over the last month?

Base: Those who have encountered information on said reform over the month
N=661 / 815 / 457 / 714 / 1009

Decentralization of power

Residents of the Western region more often receive information on decentralization reform from national and local TV stations, while in the Eastern region these news channels are used less. In the South more residents think that the reform is not covered enough by the media.



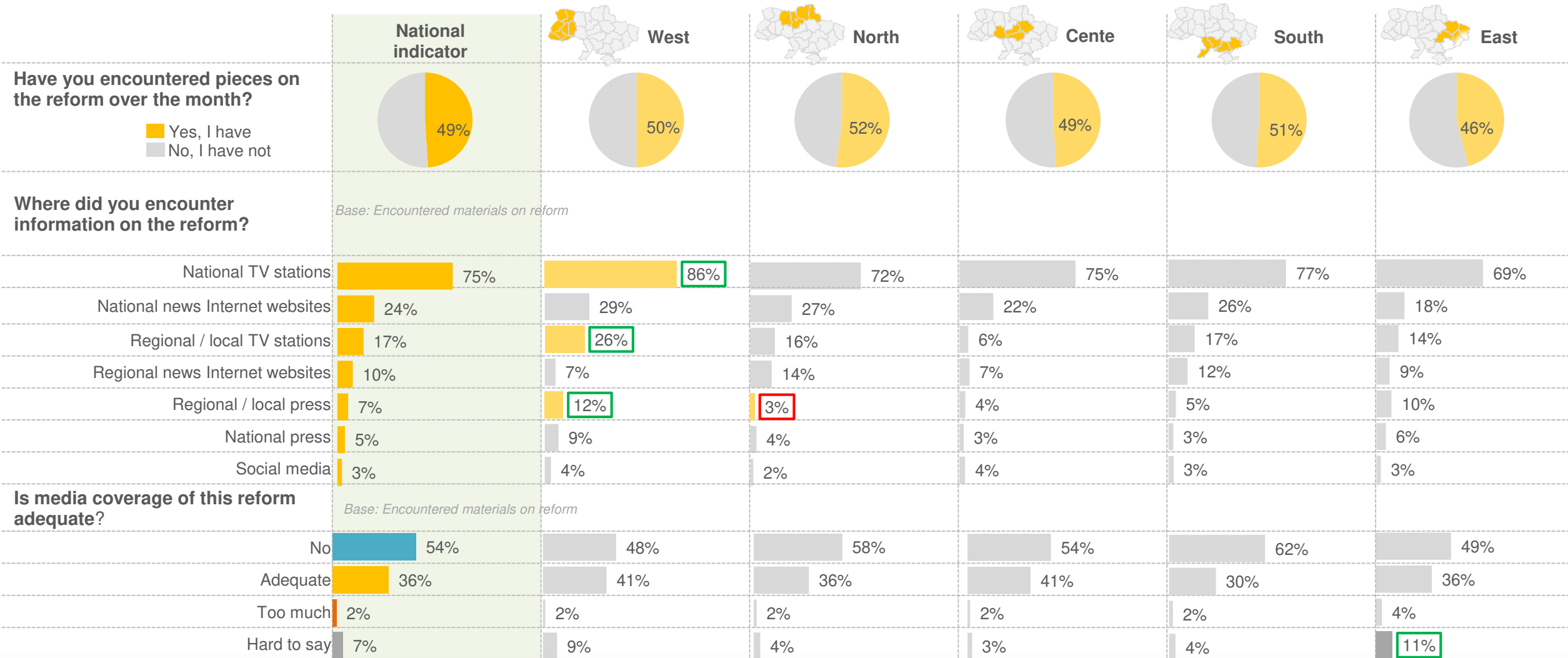
Significantly more / less at 95% compared to the general sample division

Question: 1. Have you encountered publications or TV pieces on these reforms over the last month?
 2. Where have you encountered publications or TV pieces on the reforms?
 3. Do you think there are enough publications / pieces in the media dedicated to the substance of this reform and its implementation?

Base: Overall sample, N=1650
 Those who have encountered information on said reform, N~661 / 119/ 158 / 64 / 129 / 190

Healthcare reform

Residents of the Western region more often than the overall sample learned about healthcare reform from national, local TV stations and the regional press.

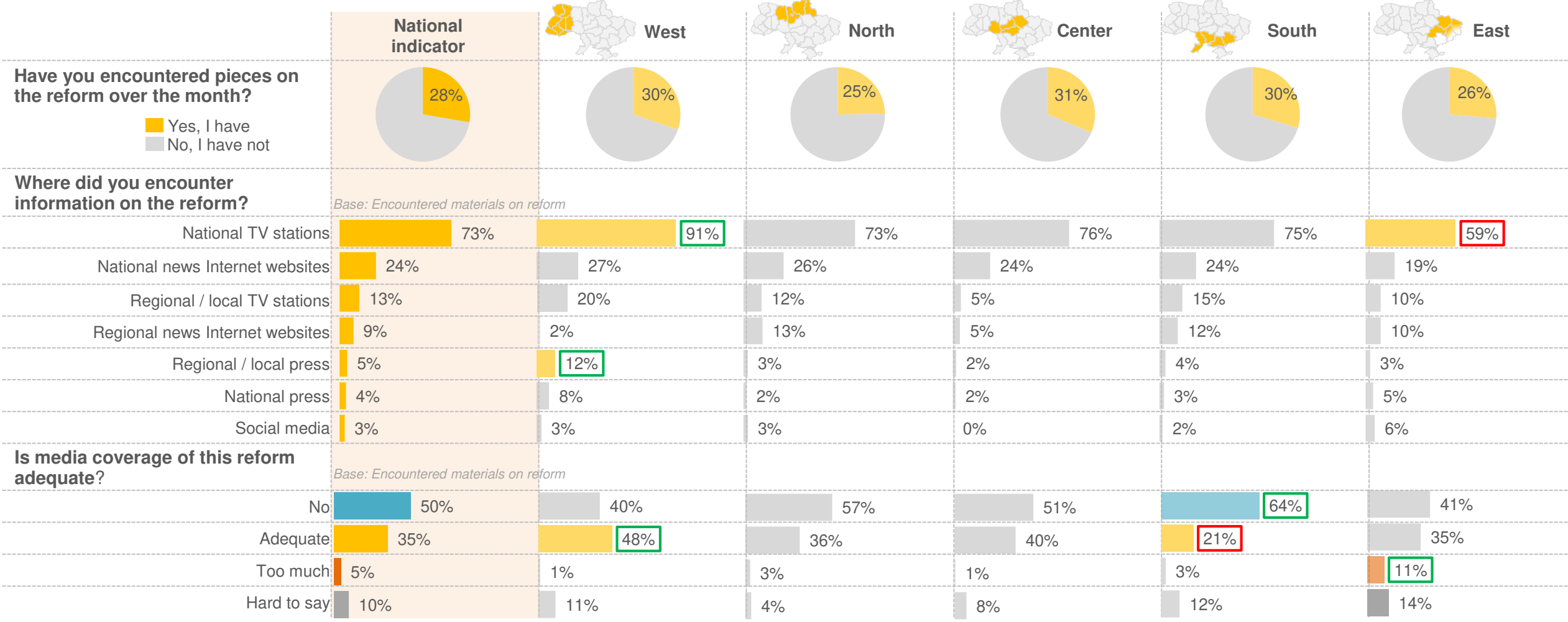


Question: 1. Have you encountered publications or TV pieces on these reforms over the last month?
 2. Where have you encountered publications or TV pieces on the reforms?
 3. Do you think there are enough publications / pieces in the media dedicated to the substance of this reform and its implementation?

Significantly more / less at 95% compared to the general sample division
 Base: Overall sample, N=1650. Those who have encountered information on said reform, N=815 / 137 / 225 / 79 / 153 / 220

Energy sector reform

Like in the case of other reforms, residents of the Western region use national TV stations to receive information more often than the overall sample. In the South there are significantly more residents who lack information on this reform.



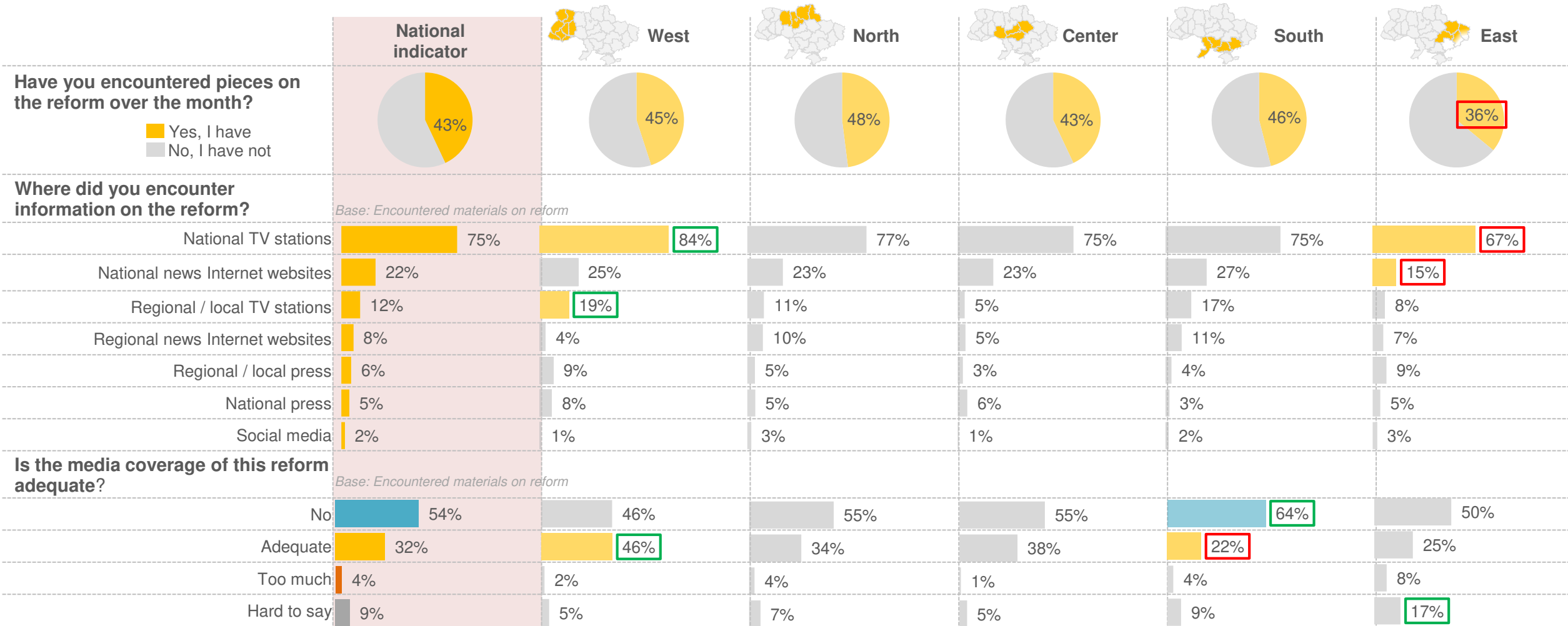
Significantly more / less at 95% compared to the general sample division

Question: 1. Have you encountered publications or TV pieces on these reforms over the last month?
2. Where have you encountered publications or TV pieces on the reforms?
3. Do you think there are enough publications / pieces in the media dedicated to the substance of this reform and its implementation?

Base: Overall sample, N=1650
Those who have encountered information on said reform, N~457 / 84 / 107 / 51 / 89 / 127

Land reform

The residents of the Eastern region are a lot less informed about land reform.



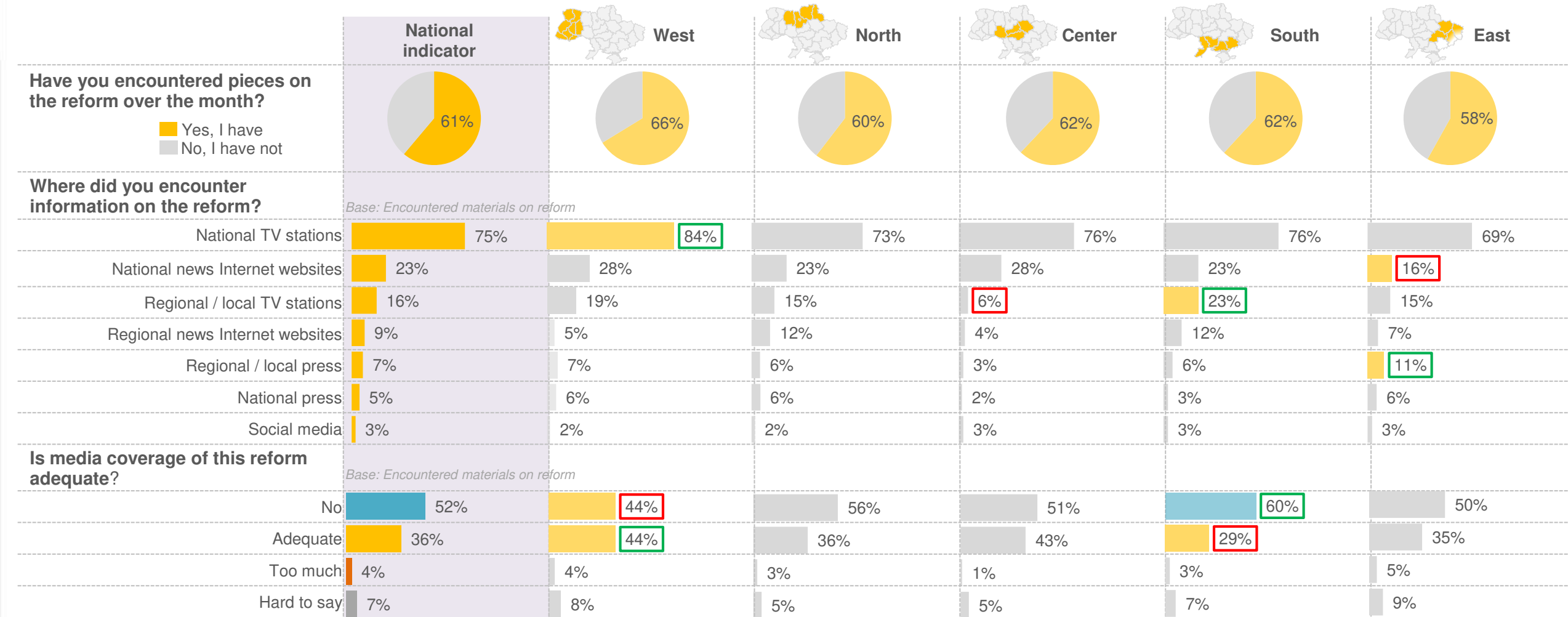
Significantly more / less at 95% compared to the general sample division

Question: 1. Have you encountered publications or TV pieces on these reforms over the last month?
 2. Where have you encountered publications or TV pieces on the reforms?
 3. Do you think there are enough publications / pieces in the media dedicated to the substance of this reform and its implementation?

Base: Overall sample, N=1650
 Those who have encountered information on said reform, N~714 / 125/ 207 / 69 / 138 / 175

Pension reform

Like in the case of other reforms, residents of the Western region mostly use national TV stations to receive information. Although national TV stations are the main source of information in all regions, residents in the South receive more information from local TV stations, while residents in the East from the local press.



Significantly more / less at 95% compared to the general sample division

Question: 1. Have you encountered publications or TV pieces on these reforms over the last month?
 2. Where have you encountered publications or TV pieces on the reforms?
 3. Do you think there are enough publications / pieces in the media dedicated to the substance of this reform and its implementation?

Base: Overall sample, N=1650
 Those who have encountered information on said reform, N~1009 / 183/ 260 / 101 / 185 / 279

FOCUS GROUPS (Anecdotal): coverage of reforms

Reform	Quality and peculiarities of coverage
Pension	<p>Is covered more often and better (more specific, informative, in layman's terms) than others, but still not enough, lacks details</p> <ul style="list-style-type: none"> • Young people purposefully did not look for information on reforms, lacked interest, the older TA knows the nuances better, but is somewhat sceptical and distrustful of the information. • Sometimes you can see specific numbers, charts, pics and pension formulas on TV and on the internet. • Sporadic presentation of issues - reminiscent of hearsay, no specific documents are shown. • TV coverage is better (UT-1, ICTV, 1+1), in particular, during talk-shows. • The main media source of information is Prime Minister V.Groisman.
Medical	<p>A fair number of TV pieces, but consumers still lack the necessary information</p> <ul style="list-style-type: none"> • The most popular topic (information is vital to all TA groups), additional data searches are independent and purposeful. • Its coverage involves more experts (doctors) compared to other reforms, but certain aspects of reform still remain unclear to the population (a lot of obscure terms, «<i>vague</i>»). • The reform's main speaker, Health Minister Ulana Suprun, is trusted by the media audience as a competent specialist. • Information was seen on TV (specifically Channel 5) and the internet.

FOCUS GROUPS (Anecdotal): coverage of reforms

Reform	Quality and peculiarities of coverage
Land	<p>Mentioned often but its essence remains uncovered, total populism (perceived as the main topic for the opposition's political PR — for the BYuT, Svoboda and Radical political parties before the upcoming elections)</p> <ul style="list-style-type: none"> • The youngest TA is basically unaware of the reform's essence (<i>«heard the name»</i>). • Respondents say that experts are rarely used in coverage. Instead, everyone gets his or her say: politicians, political scientists, even singers. • Complex and chaotic presentation hyperbolizing the negative effects. • Media consumers are still not sure about the real risks and advantages of reform implementation. • Comment from Vinnytsya: reform is perceived as a means of robbing the population and granting land to tycoons.
Energy	<p>One of the worst in terms of quality of coverage (<i>«complete darkness»</i>): there is little information, it's monotonous and unclear.</p> <ul style="list-style-type: none"> • All TAs know next to nothing about the reform, they have heard about it and why it's being criticized. • Some have stumbled upon the following information on the topic: “Rotterdam+” (news reports about the coal pricing formula that many believe hiked their power prices and benefited Akhmetov’s company DTEK) (mostly on “Inter” TV station), introducing energy effectiveness in the regions (TV reports from towns and cities). • The main question is how this reform will effect energy consumers.
Decentralization	<p>Very bad coverage: there is little information and it is unclear</p> <ul style="list-style-type: none"> • Consumers are comparatively less interested in this reform: the reform is complex, only certain aspects are of interest (for instance, education financing, local budget benefits compensation etc). • The main question is what specifically (which changes and innovations) to expect in the future.



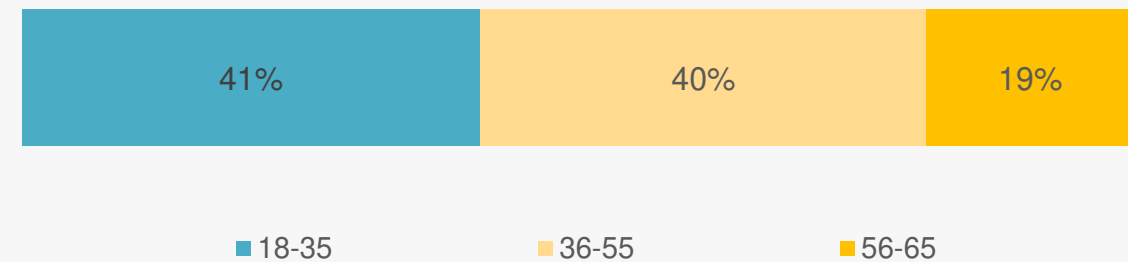
SOCIAL- DEMOGRAPHIC PROFILE

Social-demographic profile 2017

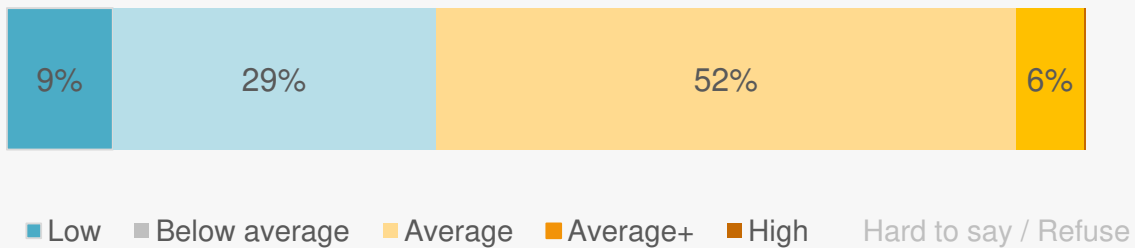
Gender



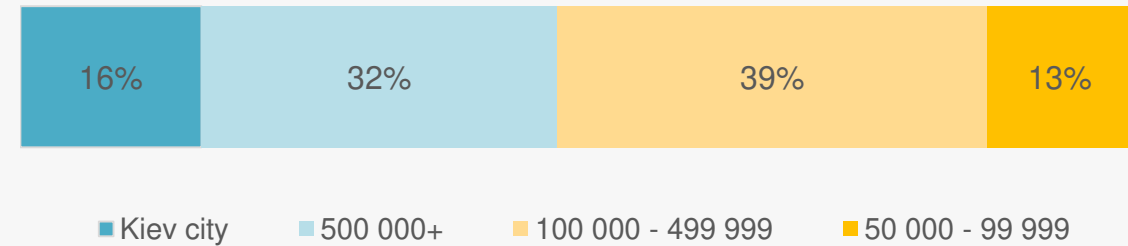
Age



Income

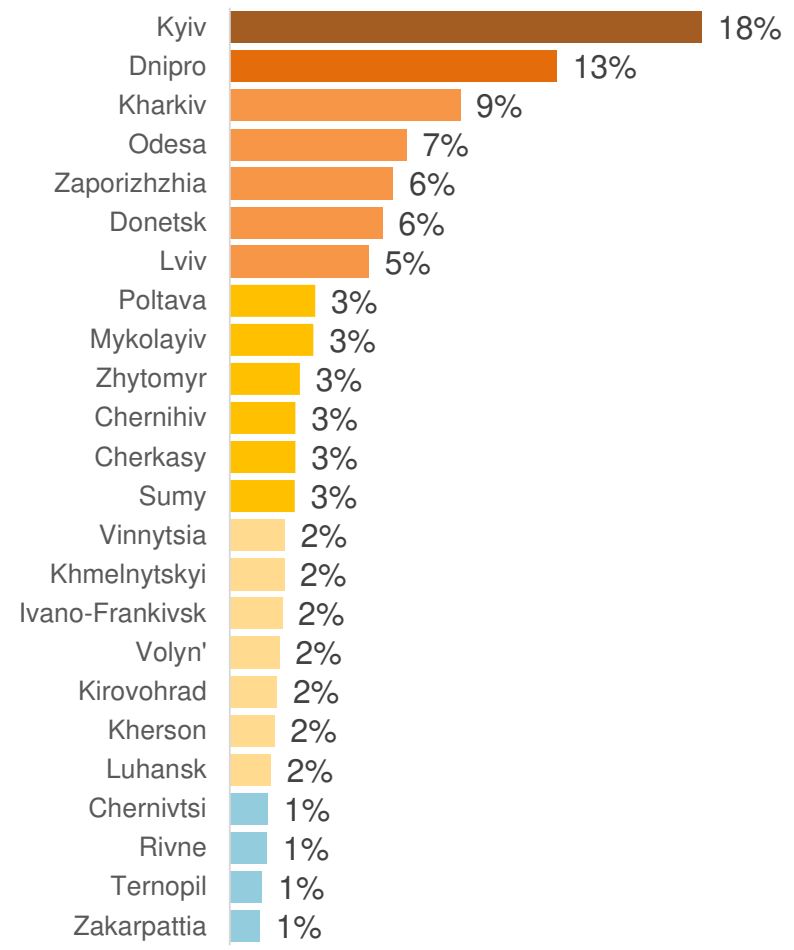


Settlement type



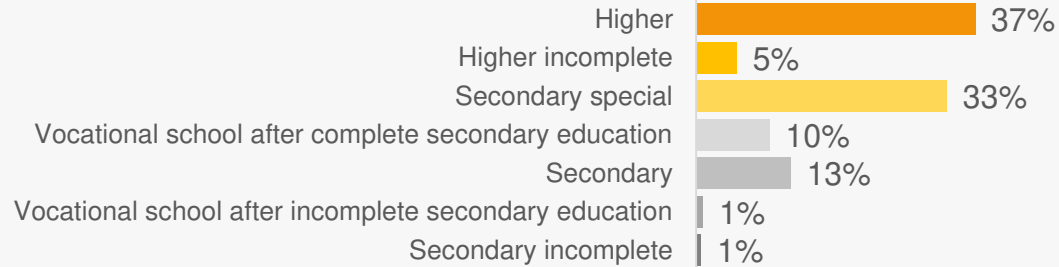
Social-demographic profile 2017

Region

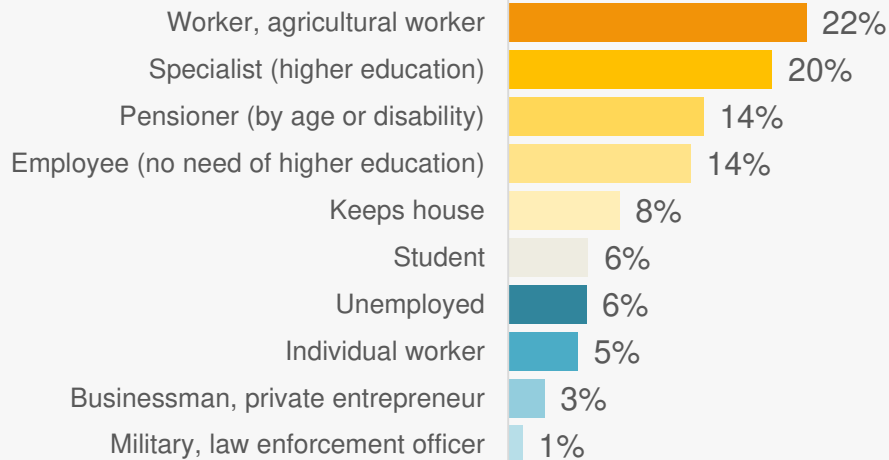


Social-demographic profile 2017

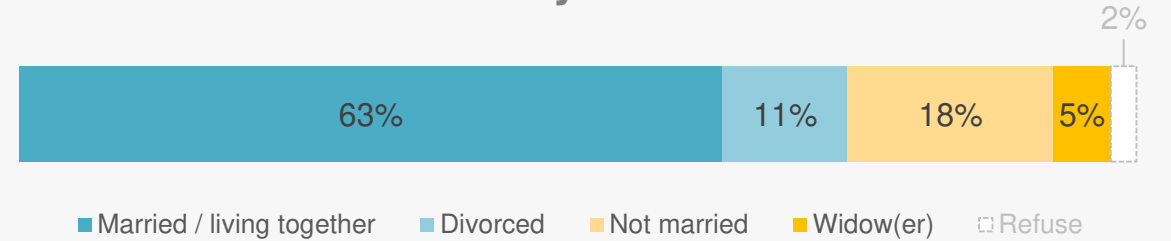
Education



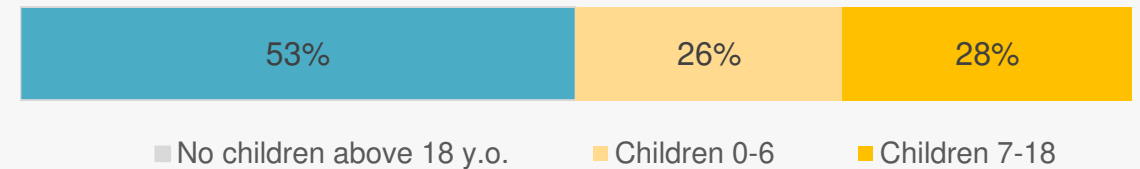
Occupation



Family status



Children



Size of the household

