



Ukrainian media use and trust in 2022

The study was carried out by InMind at the request of the International Non-Governmental Organization Internews, implementing the Ukrainian Media Project (U-Media Project), with the financial support of the US Agency for International Development (USAID).

November 2022

<u>Study Design</u>	3	<u>Fact-Checking</u>	57
<u>Key Findings</u>	4	<u>Reforms Needed to Join the EU</u>	60
<u>Media Consumption</u>	7	<u>Russian Media</u>	63
<u>Trust in Information Sources</u>	31	<u>Complaints about Media Content</u>	68
<u>Assessment of News Covering the War in Ukraine</u>	36	<u>Willingness to Pay for Access to Online Media</u>	71
<u>Media Literacy</u>	41	<u>Media Coverage of Equality-Related Topics</u>	73
<u>Debunking False Narratives</u>	53	<u>Pride in Ukraine</u>	78
		<u>Annex 1. Study Methodology</u>	80
		<u>Annex 2. Sociodemographic profile</u>	84
		<u>Annex 3. Regional Indicators</u>	88

Annual survey using quantitative and qualitative methods of information collection

Stage 1

Baseline focus group discussions, N=4

Identifying new trends in media consumption

Drafting recommendations concerning changes to be introduced in the quantitative stage questionnaire, taking into account potential trends

Stage 2

The main stage involving a nationwide survey at respondents' homes in cities of 50K+, N ~ 3,200

Measuring key indicators of media consumption, trust in the media, and media literacy

Stage 3

Interpretive focus group discussions, N=6

Discussion of the results of the quantitative stage to enrich potential analytical interpretations

Stage 4

Focus group discussions and in-depth interviews with special population groups:

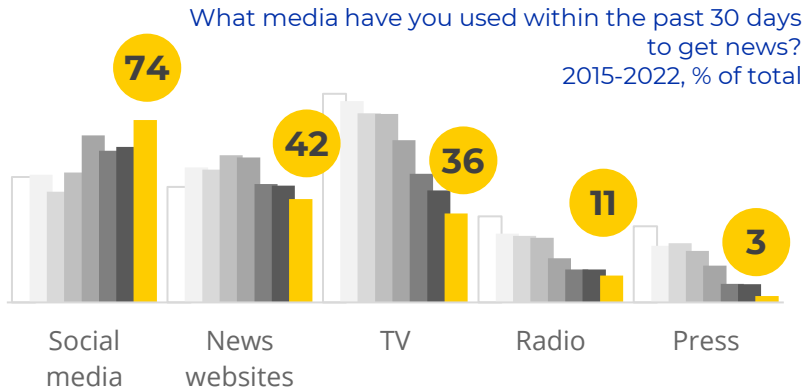
- rural inhabitants (2 FGD),
- Internally Displaced Persons (3 FGD),
- inhabitants of temporarily occupied territories and/or where there are hostilities (15 interviews)

Determine the specificities of media consumption, trust in the media, and media literacy for special population groups

Key Findings (1)

Use of the Media

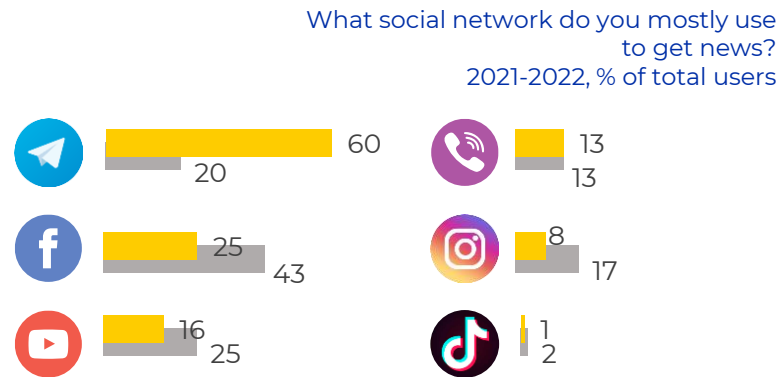
In 2022, there have been significant changes in news consumption – consumption of TV, radio, press and online news sites (most of all TV) has decreased, while the news audience moved mainly to social networks. 49% of Ukrainians use several types of media for news; if they use only one source, these are usually social networks.



The number of those who use the internet every day is increasing every year – in 2022 the figure was 85%; with 96% of young people aged 18-35 using the internet every day. 82% of the respondents use smartphones to consume news, while among young people aged 18-35 this figure is 92%.

Social networks are more popular among Ukrainians aged 18-35 years, news websites are more favored by those aged 35-45 years, while Ukrainians over 46 years make up the majority of the television audience. Almost all consumers of television news know about the "United News" telethon, 32% of the respondents are telethon viewers. Of the news sites, consumers prefer online news services such as Google or ukr.net. 1+1 is both the most popular TV channel (62%) for news consumption and the most popular website (tsn.ua/1plus1.ua) - (21%).

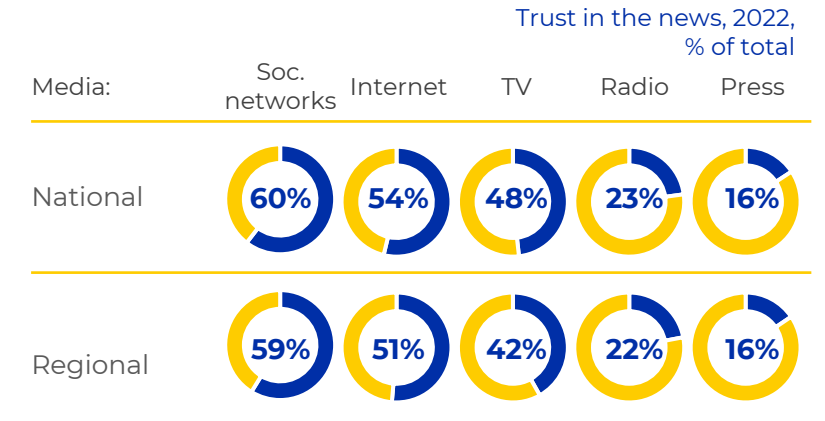
In 2022, Telegram has become the main social network for both communication and news consumption, showing significant growth in both categories. Facebook has reduced its audience reach and has been losing traction in terms of news consumption. Viber also reduced its audience reach, but its news consumption indicators remain the same.



Trust in the Media

The most trusted news sources are the most popular ones – about 60% of respondents trust news on social networks, 54% trust national news online, and 48% trust national television news.

In 2022, the level of trust in internet sites – both national and regional, as well as in national TV has increased. At the same time, all types of the press have lost traction, the main reasons respondents gave for this were the lack of facts and that the information does not seem reliable.



(share of those who fully trust or mostly trust them)



Key Findings (2)

Consumption of regional news this year has increased significantly for almost all sources, most of all for radio and internet sites.

Audience of social media - 74% of the total

What social media news pages/channels have you read/watched within the past 30 days? (among consumers of social networks)

Social networks	2015	2016	2017	2018	2019	2020	2021	2022
National							77%	
Regional							62%	
International							20%	

The most common social media channels are:

- Telegram – Trukha Ukraine, UNIAN – news of Ukraine, TSN news, Ukraina Seichas;
- Facebook – TSN, Obozrevatel, Volodymyr Zelenskiy, Ukrayinska Pravda;
- YouTube – TSN, Channel 24, Oleg Zhdanov, Feygin LIVE, Alexey Arestovych;
- Viber – Blyskavka, Kraina_info.

On social networks, Ukrainians most often follow bloggers/opinion leaders such as Serhiy Prytula, Dmitry Gordon and Oleksiy Arestovych.

News site audience - 42% of the total

What news sites have you visited in the past 30 days? (among online media consumers)

News sites	2015	2016	2017	2018	2019	2020	2021	2022
National	93%	91%	90%	92%	89%	84%	85%	83%
Regional	28%	31%	31%	42%	33%	29%	27%	55%
International					11%	19%	24%	24%

The most popular sites for receiving news are 1+1 / TSN (1plus1.ua / tsn.ua), UNIAN (unian.net) and Ukrayinska Pravda (pravda.com.ua), second only to the news of online services.

Regional news sites are more popular with residents of the southern and eastern regions.

Television audience - 36% of the total

Which TV channels have you watched for news over the past 30 days? (among TV consumers)

	2015	2016	2017	2018	2019	2020	2021	2022
National	99%	99%	99%	99%	99%	95%	94%	89%
Regional	43%	44%	39%	45%	30%	28%	27%	44%
International					4%	10%	8%	11%

The leaders in the national news broadcasting are 1+1, ICTV, Inter and STB channels.

Regional TV channels are most commonly used for news by residents of the Eastern regions.

Audience radio - 11% of the total

What radio stations have you listened to in the past 30 days? (among radio consumers)

Radio	2015	2016	2017	2018	2019	2020	2021	2022
National	87%	90%	93%	92%	91%	82%	76%	69%
Regional	27%	28%	25%	27%	22%	27%	31%	56%
International					2%	6%	6%	8%

Radio channels are most often listened to by residents of Western regions.

The audience prefers national radio, the most popular stations are Lux FM, Ukrayinske Radio and HIT FM.

Print media audience – 3% of the total

What print media have you used to read the news within the past 30 days? (among consumers of print media)

Press	2015	2016	2017	2018	2019	2020	2021	2022
National	61%	55%	50%	58%	56%	45%	54%	42%
Regional	63%	70%	68%	69%	65%	67%	57%	71%
International					2%	7%	7%	11%

The audience of the print media is small, consisting mostly of Ukrainians over 56 years.



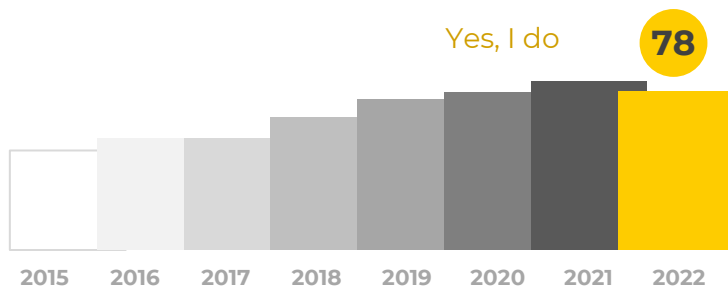
Key Findings (3)

Media Literacy

In 2022, the share of consumers who pay attention to the source of news has increased. At the same time, fewer respondents pay attention to whether different points of view are represented, and the share of those who are willing to trust their favorite media "by default" has increased.

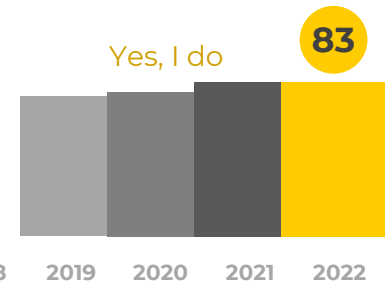
The rate of awareness of the existence of hidden advertising has bounced back to the level of 2020, but the share of the respondents who think that they can distinguish such content has increased.

Do you know that sometimes the media publish paid/sponsored content or covert advertising presented as ordinary one? 2015-2022, % of total



83% of the respondents are aware of the existence of disinformation. Most believe that they can identify it. Many people also think disinformation is "not an urgent issue."

Do you know that the media sometimes publish disinformation? 2019-2022, % of total



Disinformation

In 2022, the number of people who had heard prevalent disinformation narratives ranged from 49% (the war between Ukraine and Russia was provoked by the United States) to 13% (Jews benefit the most from the war between Ukraine and Russia). According to the research participants, the most believable narrative is the one that mercenaries from more than 50 countries are fighting for Ukraine, while the least believable is the story about cities in Donbas being destroyed not by Russia but by the Ukrainian army.

One in three respondents discussed these narratives with their friends and family.

Regarding the motivation behind sharing such information, respondents most often claimed that they used it just as a conversation starter.

Reforms

79% of the research participants are aware of at least one reform that Ukraine has to implement under the EU Association Agreement. The reforms that the respondents heard the most about include anti-corruption reform, judicial reform, and anti-money laundering. The least known is about the need to harmonize audiovisual legislation with European law and to amend the law on national minorities. Respondents support most reforms, most of all anti-corruption reform and anti-money laundering. The reform of the audiovisual legislation and amending the law on national minorities received the least support, but this was due to lack of knowledge about their significance and contents.

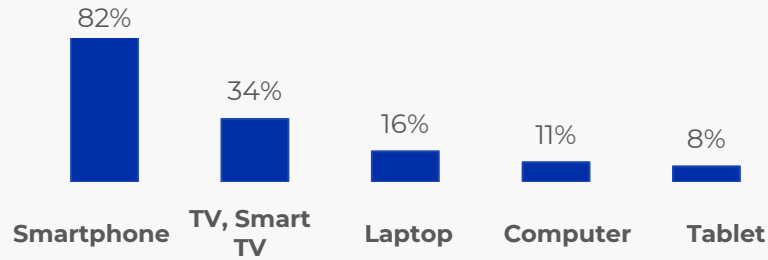
Russian media

There is a decrease in the personal consumption of Russian media – only 12% of respondents have been using Russian media in 2022, the share of Russian media consumers in the respondents' environment has decreased significantly too – down to 25%. The main reason for using Russian news media is to find out what they say about Ukraine.

Among the types of news sources, Ukrainians still prefer social networks, but the level of trust in all Russian media is extremely low.

Media Consumption

Devices used to get news

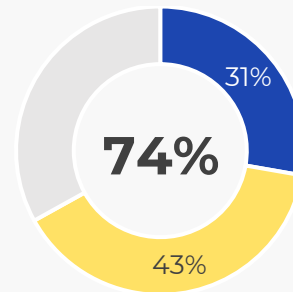


In 2022, the vast majority of Ukrainians consumed news from social networks. About 40% of respondents get news from internet sites and television. Radio and newspapers are hardly ever used as the main source of news.

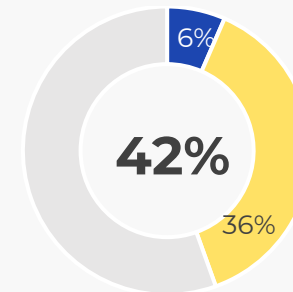
Most often, Ukrainians use several types of media for news; if only one source is used, these are usually social networks.

The smartphone is the main device used by respondents to get news.

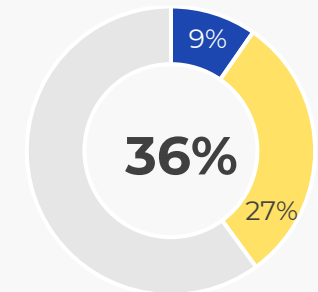
Monthly use of the media to get news



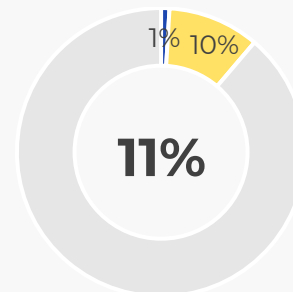
Social networks



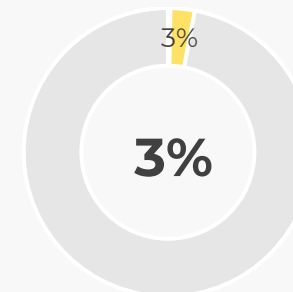
Internet sites news



Television



Radio



Print media

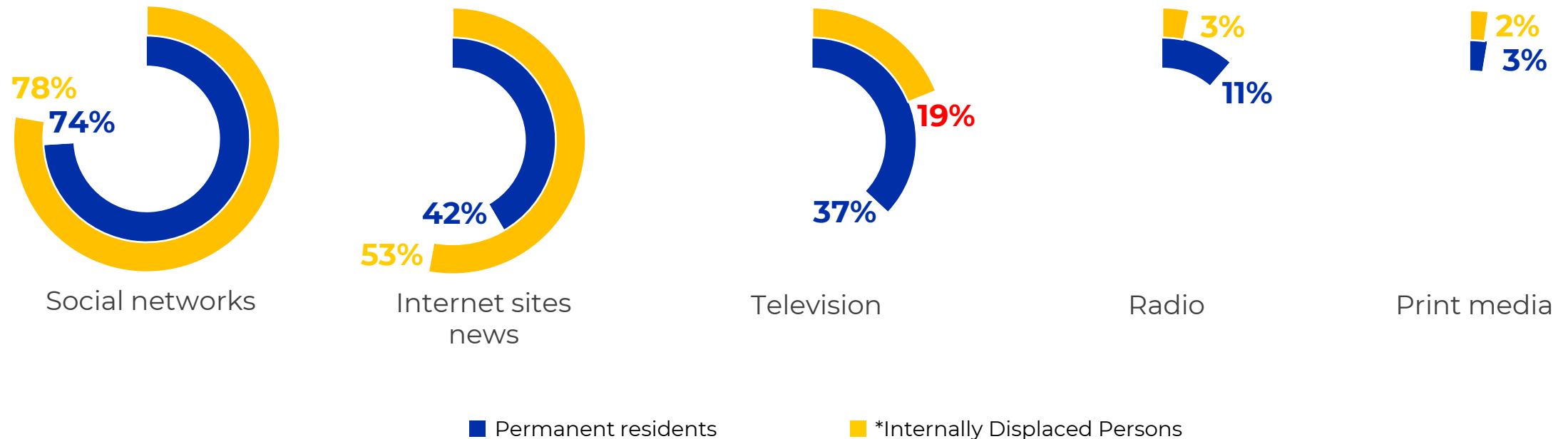
- Only this source
- Together with other news sources
- Not used at all

Questions: What media have you used in the past 30 days to receive news?
Which of the following devices have you used to receive news in the past 30 days?

Base:
Total sample, N=1,456

Internally displaced persons (IDPs) are as active as permanent residents in news consumption online- on social networks and sites, but much less frequently watch the news on TV because IDPs have more limited access to one.

Monthly use of the media to get news



Question: What media have you used in the past 30 days to receive news?

Base:
Permanent residents, N=1394
Internally Displaced Persons, N=62

**Internally Displaced Persons - those who answered that did not live as of 24.02.2022 in the city of survey conducting*

x /x – significantly more/less at 95% compared to the total sample **9**

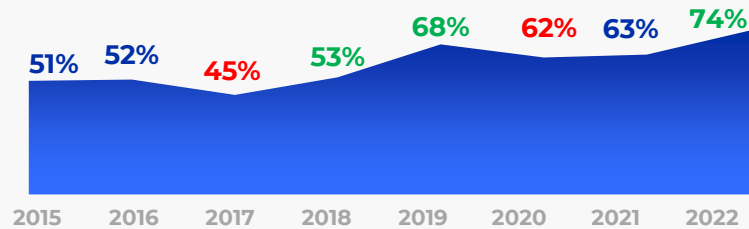
In 2022, there have been significant changes in news consumption – consumption of TV, radio, newspapers and online news (most of all TV) has decreased, while the news audience moved mainly to social networks.

In general, the use of traditional media – television, radio and print media – has been consistently declining throughout the period under study.

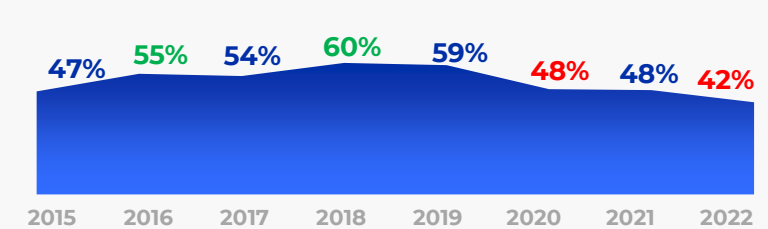
Monthly use of the media to get news, 2015-2022



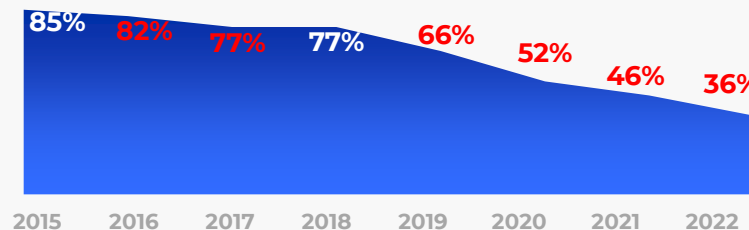
Social networks



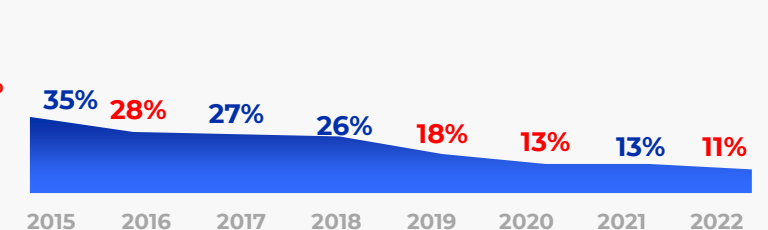
News sites



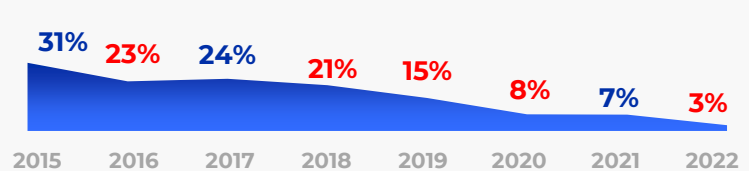
Television



Radio



Print media



Question:
What media have you used within the past 30 days to get news?

Base:
Total sample, 2015-2021, N~1,600/wave
2022 N~1,450

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

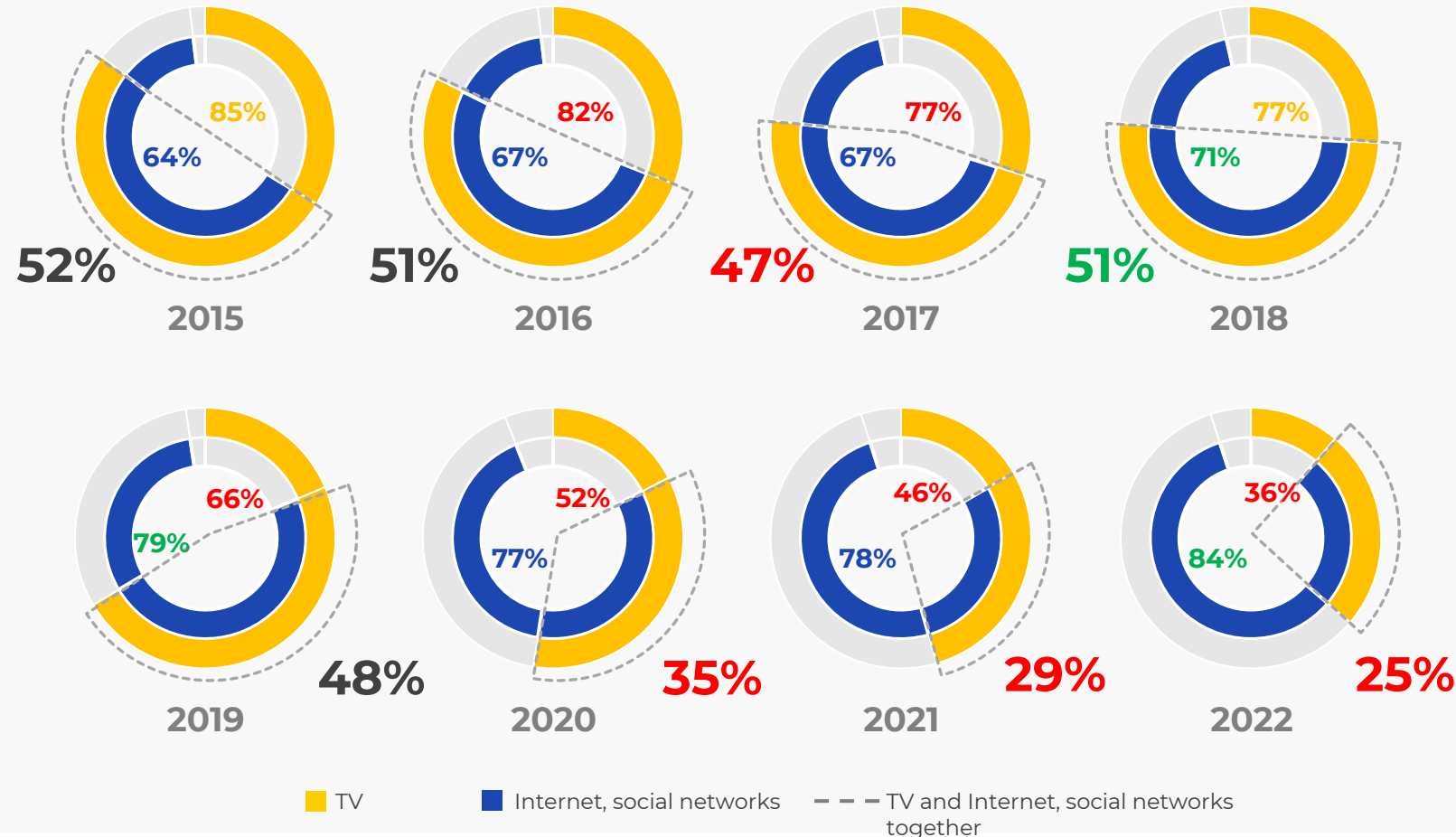
Daily use of the Internet



The number of those who use the internet every day has been increasing year after year – in 2022 the figure was 85%; with 96% of young people aged 18-35 using the internet every day.

Today, the majority of respondents are online news consumers (online media and social networks), who do not watch news on TV - 59%.

Monthly use of the media to get news



Questions:

How often do you use the Internet at all? - % of daily users
 What media have you used in the past 30 days to receive news?

Base:

Total sample, 2015-2021, N~1,600/wave
 2022 N~1,450

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

(by focus groups results)



Full-scale war radically impacted on the need for news among respondents - in fact, there was a need for a constant flow of information. Control over news became one of the factors of feeling safe.

Those respondents who previously deliberately avoided the news, began to follow it too. Many respondents before the war most often watched entertainment content, and news content was secondary for them, but since the beginning of war, news content began to take the first place in their consumption (*"I began to constantly watch the news," "Now I can't watch entertainment programs at all"*).



We see an increased use of different sources of news consumption (*"I started looking for news from different sources"*).

Since entertainment programs have been removed from many media, there is a shift of respondents to YouTube, where they consume entertainment content (series, shows). There is increased attention to and use of Telegram channels.



The main device through which respondents receive information is their smartphone. The television is used for news consumption as a background during doing work about the house most often (*"When I'm doing something around the house, it's on and I listen to it"*). Respondents also use a laptop to read news websites. The radio is rarely used as a device for news consumption by respondents, except for when in the car or at the workplace (*"I listen to the radio in the workshop"*).

(specificities of special population groups during focus group discussions and in-depth interviews)



INTERNALLY DISPLACED PERSONS

At the beginning of the full-scale hostilities, respondents (in most cases) did not have access to TV news due to the lack of telecommunication and the fact that they had to stay in shelters, without access to any kind of communication. After moving to Ukrainian-controlled territory, respondents experienced a sharp increase in the intensity and scope of news consumption.

The source of news consumption is determined by the availability of access to the device rather than their personal conscious choice. For example, most people do not have access to TV in their current place of residence, so the consumption of TV news is extremely limited. The same is true for the radio, the access to the laptop/computer is restricted also.



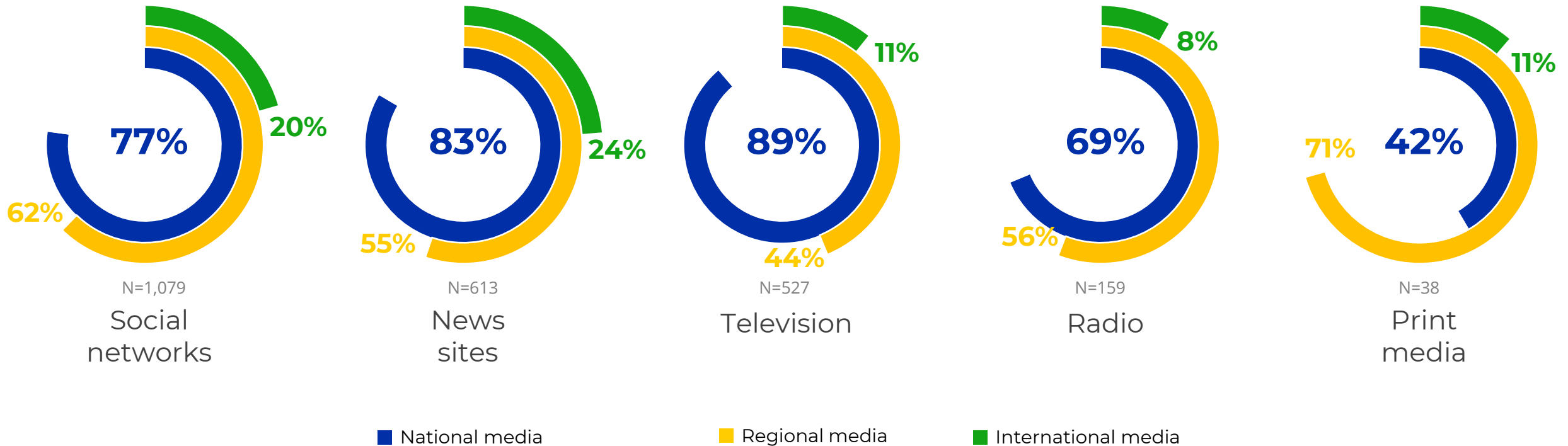
INHABITANTS OF TEMPORARILY OCCUPIED TERRITORIES and/or WHERE THERE ARE HOSTILITIES

Some sources of information are no longer available due to the hostilities and occupation. For example, people who do not have a satellite dish or connectivity and VPNs lost access to Ukrainian television. Also, some people reported losing access to Ukrainian radio, although this loss was not very significant to them, because radio was not used as a major way of receiving news.

The main device for news consumption is the mobile phone. Primarily this is due to a sense of security – in critical circumstances, it's easier to erase information in a few clicks, delete dangerous apps or information channels, clear search history, and protect yourself.

Most respondents receive news from national media – the main source is social media channels that cover national news, national online news sites and national television. However, with print media, the situation seems to be the opposite – research participants prefer regional newspapers to national ones.

The share of different types of media among news consumers



Question:
What social media news pages/channels have you visited within the past 30 days?
(SIMILAR QUESTION FOR SITES/ONLINE SOURCES, TV RADIO AND PRINT MEDIA)

Base:
Consumers of news from this type of media

2015-2022



Social networks



News sites



Television

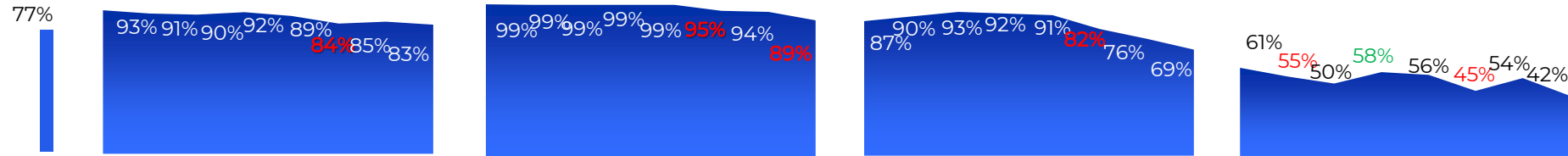


Radio

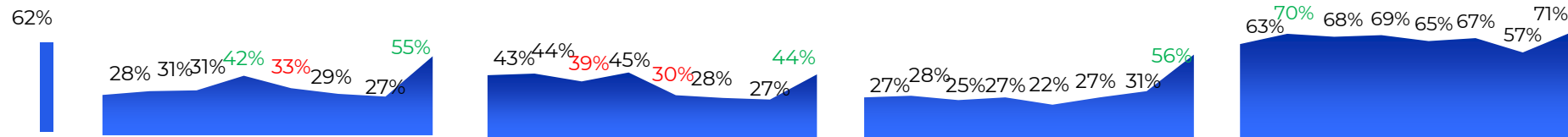


Print media

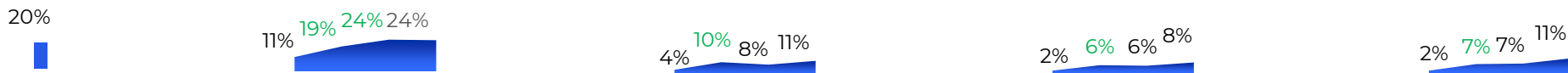
National



Regional



International



N=

Year	2015	2016	2017	2018	2019	2020	2021	2022
Social networks	1,079							
News sites	777	895	894	984	956	760	753	613
Television	1,404	1,350	1,271	1,260	1,075	829	721	527
Radio	579	465	443	432	295	212	212	159
Print media	513	371	393	344	244	119	117	38

Question:
What social media news pages/channels have you visited within the past 30 days?
(SIMILAR QUESTION FOR SITES/ONLINE SOURCES, TV RADIO AND PRINT MEDIA)

Base:
Consumers of news from this type of media

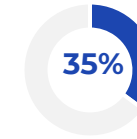
x / x - significantly more / less at 95% compared to the previous wave



News sites

What national websites do you visit most often? Indicate up to three sites.

	2021	2022
News services		
Google	48%	33%
Ukr.net	17%	14%
UNIAN (unian.net)	8%	10%
Websites		
TSN (tsn.ua) / 1+1 (1plus1.ua)	24%	21%
Ukrayinska Pravda (pravda.com.ua)	5%	8%
Novyny Ukrainy (mediaua.com.ua)	5%	5%
Hromadske.TV (онлайн)	6%	5%
META (meta.ua)	1%	4%
Korrespondent (korrespondent.net)	8%	4%
Fakty (fakty.ua)	5%	3%
Liga.net (liga.net)	6%	3%
Gazeta.ua (gazeta.ua)	2%	2%
Apostrophe (apostrophe.com.ua)	11%	2%
Espresso TV (online)	2%	2%
Novosti.ua (novosti.ua)	4%	2%
Obozrevatel (obozrevatel.com)	6%	2%
Channel 24 (online)	-	2%
Telegraf (telegraf.com.ua)	2%	2%
Censor.net (censor.net)	1%	2%
Glavcom (glavcom.ua)	1%	2%
Vesti (vesti-ukr.com)	4%	2%



Consumption of news on national websites

Question:
 What national websites do you visit most often? Indicate up to three sites.

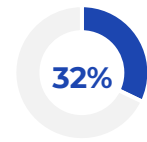
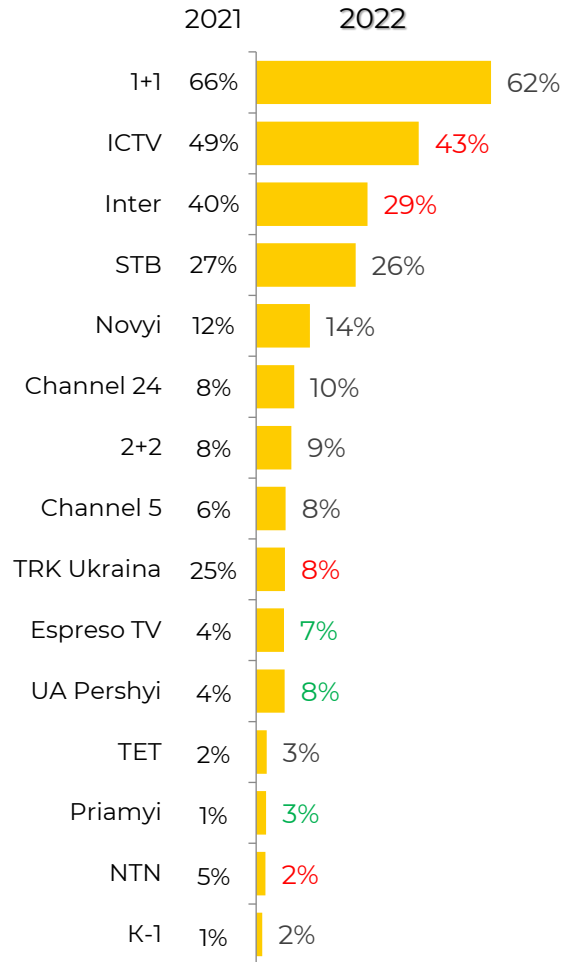
Base:
 Consumers of news from this type of media
 2021 N=643, 2022 N=511

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



Television

What national TV channels do you watch most often for news? Indicate up to three channels.

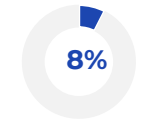
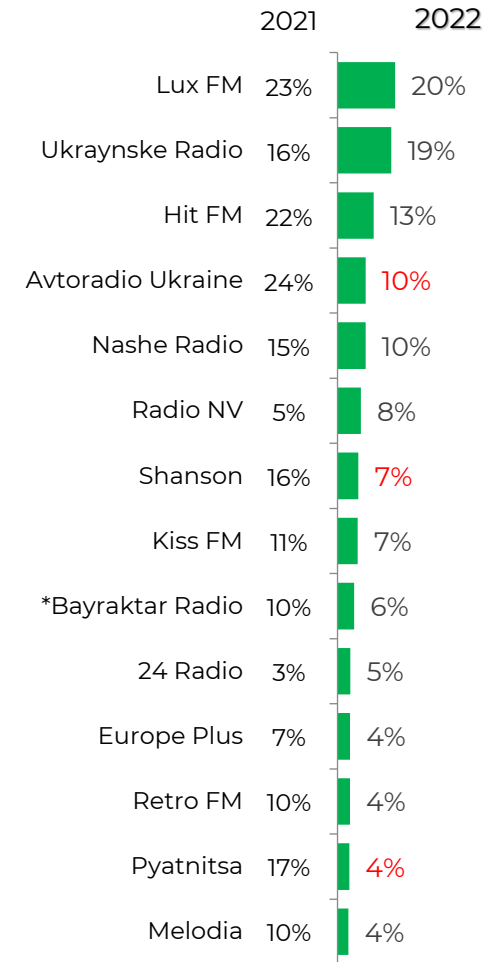


Consumption of news on national TV



Radio

On what national radio stations do you listen to the news most often? Indicate up to three stations.



Consumption of news on the national radio

Question:

What are the top three national TV channels that you watch most often for news?
 On what national radio stations do you listen to the news most often? Indicate up to three stations

*by March 2022 – Russkoye radio Ukraina

Base:

Consumers of news from this type of media
 Television, 2021 N=680, 2022 N=468
 Radio, 2021 N=161, 2022 N=109

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

(by focus groups results)



Before the war, respondents mainly relied on 1 – 2 sources of news, but after the escalation, respondents say they've become to use from 3 to 5 different sources - not only for getting a more complete picture ("*to monitor the situation*"), but also to check the news for disinformation ("*I compare news from various sites for disinformation*").



Interest in regional media has increased due to air strikes and shelling of the regions (News of Lviv region, Trukha Poltava, Kyiv operativny, Pidsluhano Kyiv, Kyiv info, Odesa news, Zhytomyr info). Respondents often watch regional media because their relatives live in the regions.

Respondents note that it is very easy to check regional news for disinformation, because "*you yourself live in this region and see everything with your own eyes.*" There is also trust in the heads of regional administrations, who express their position on current events through the regional media. Respondents use the Telegram channels of city mayors and military administrations (Sadovyi, Klitschko, Mamai) and/or the Telegram channels of the local unit of the State Emergency Service.



As for whether the internet will replace traditional media, respondents consider that such a replacement has already taken place. But there are respondents who believe that TV will always be used because it is much easier for a person to visually perceive information.

(specificities of special population groups in focus group discussions and in-depth interviews)



INTERNALLY DISPLACED PERSONS

News consumption increased after moving from their hometown. Information about the situation in the country and the world in general is learned from the news, whereas about the hometown - from friends and family. This is because the majority of respondents come from occupied cities, where there is often no direct access to the media they trust.

IDPs focus on news from their native region (everyday life, shelling, military actions, forecasts about the liberation of territories, etc.) - respondents indicated that this is how they feel in control of the situation and monitor what is happening as best they can. IDPs are interested in local news of the city of their current residence only in order to find information about humanitarian assistance, social protection, work, housing, schools.



INHABITANTS OF TEMPORARY OCCUPIED TERRITORIES and/or WHERE THERE ARE HOSTILITIES

The attitude towards news in general has changed – respondents used to receive information about the country and the world just to be aware of the events, now they feel an urgent need to receive information and focus more on news reports on their region or populated area where they or their close ones live.

The hypothesis that the population of the temporarily occupied territories found themselves in an information vacuum was not supported by our interviews. In the first days of active hostilities in the regions and the occupation, there were problems with the internet and power supply. In Mariupol, people were without access to news for three weeks, in the Kharkiv region it was only a matter of hours/minutes when there was no internet or power supply. That is, if a person has a smartphone and at least some access to the internet (which they usually do), then they can get access to news. Possibly late, but people said timeliness is not such a critical factor in their current situation.

(specificities of special population groups in focus group discussions and in-depth interviews)



❑ INHABITANTS OF TEMPORARY OCCUPIED, BLOCKED TERRITORIES and/or WHERE THERE ARE HOSTILITIES

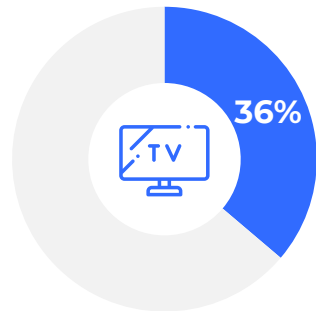
People living in temporarily occupied territories really do need to use a VPN service. This software helps to bypass the blocking of Ukrainian sites and Ukrainian content, as well as helping users feel more secure when searching for and consuming news. Younger people and digitally literate people help older people, but people still need guidance on which VPN app to choose, they need it to be free and bypass the restrictions without slowing down the speed of their apps. Interviewees reported that YouTube videos or Zoom trainings with real people providing this kind of guidance would be really helpful.

Being able to receive news from Ukrainian sources on the radio is believed to be mainly relevant for seniors, who are used to receiving information in this way or through television. Also, setting up such an information channel is perceived as more realistic and secure by respondents – they expect that it is possible to find such frequencies that cannot be intercepted and blocked.

The idea of getting a printed newspaper is perceived negatively. Print media in general have lost their relevance, and the distribution and obtaining of newspapers seems very dangerous for all those involved in the process. People are afraid that the occupation authorities will see it/will be told about it and people's lives will be in danger.

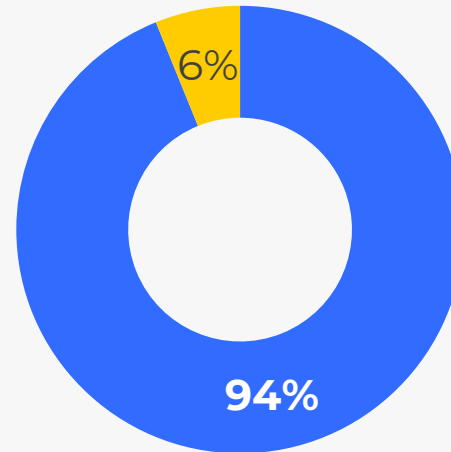
Among those who use television to consume news, almost everyone knows about the United News telethon and watches it regularly. More than 60% of the telethon viewers watch it every day, and almost 30% watch it every week.

Use TV to consume news



Among TV news consumers

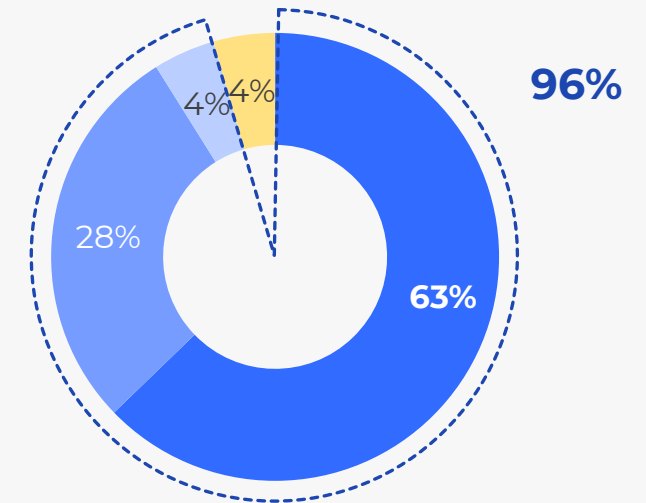
Awareness of the United News telethon



■ Aware ■ Unaware

Among those aware

Viewing frequency of the United News telethon



■ I don't watch the telethon ■ Every day
 ■ Every week
 ■ Several times a month or less frequently

Question:

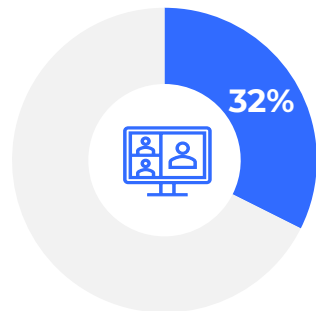
Did you know that with the beginning of Russia's full-scale invasion of Ukraine, Ukrainian TV channels united and launched a joint information telethon United News # UA Together?
 Do you watch the United News # UA Together information telethon?

Base:

Total sample, N=1,456
 Those who use TV for news consumption, N=527
 Those who use TV for news consumption and are aware of the telethon, N=495

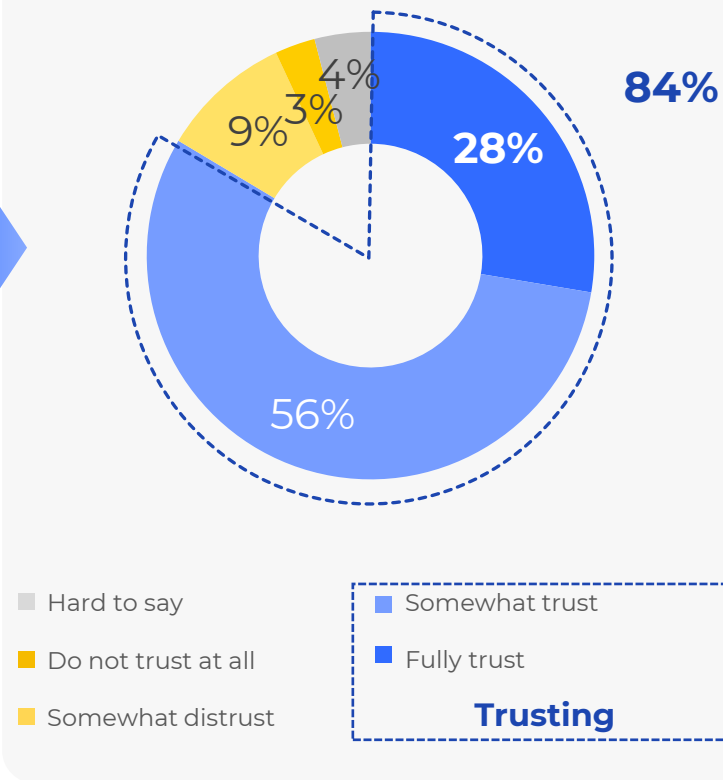
The telethon viewers manifest a high level of trust in the news provided within the telethon, as well as tend to commend the quality of its analysis of events, promptness and reliability of information.

viewers of the United News telethon

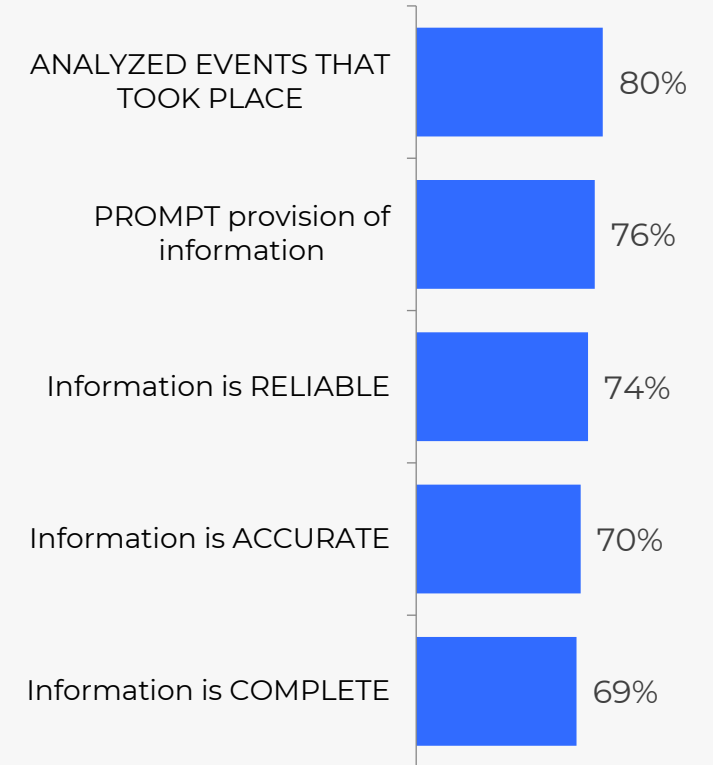


Among the viewers

Trust in the United News telethon



Assessment of the news quality on the United News telethon



Question:

To what extent do you trust the news provided in the United News telethon?
Please rate whether the news reports provided by the United News telethon meets the following criteria?
- % of those who agree completely or in part

Base:

Total sample, N=1,456
Telethon viewers, N=472

(by focus groups results)



In general, respondents have a positive attitude towards the United News telethon, noting that it goes on around the clock, it is emotionally pleasant to watch (*"They don't show such horrors as in some sources"*).

Respondents do not pay attention to which channel is broadcasting when they turn on the TV - it does not matter to them. Practically, the national telethon is perceived as a separate channel of information without reference to the brand of the TV channel producing it.



Everyone knows about the format of the national telethon, which is a combination of several channels, and respondents can name almost all the channels participating in the telethon. The combination of channels evokes a positive response from respondents, because there is no need to skip channels when looking for news. Also, it is believed that the news has become more objective, because journalists from different channels monitor and control each other.



Respondents who are TV consumers can be divided into two categories: those who watch the telethon regularly and those who have it on in the background while doing other things around the house.

Those who watch it regularly show high satisfaction and trust in the information in it, but those who have it on in the background have critical remarks about the promptness of the information, and the repetition of the same news for several hours. Respondents usually compared the speed of information in the telethon with Telegram channels, where the speed of news turnover is much higher.

(specificities of special population groups in focus group discussions and in-depth interviews)



INTERNALLY DISPLACED PERSONS

As many IDPs do not have TV access, their ability to watch the National Telethon is limited, but the 35+ aged respondents watches if possible.

Though the telethon is associated with an official source representing the state, IDPs are critical of the product. Respondents point to its inaccuracies in the presentation of details, authorities' influence over the way information is covered, excessive optimism – showing only the “victories” of Ukraine and unwillingness to cover its failures and/or unfavorable forecasts.



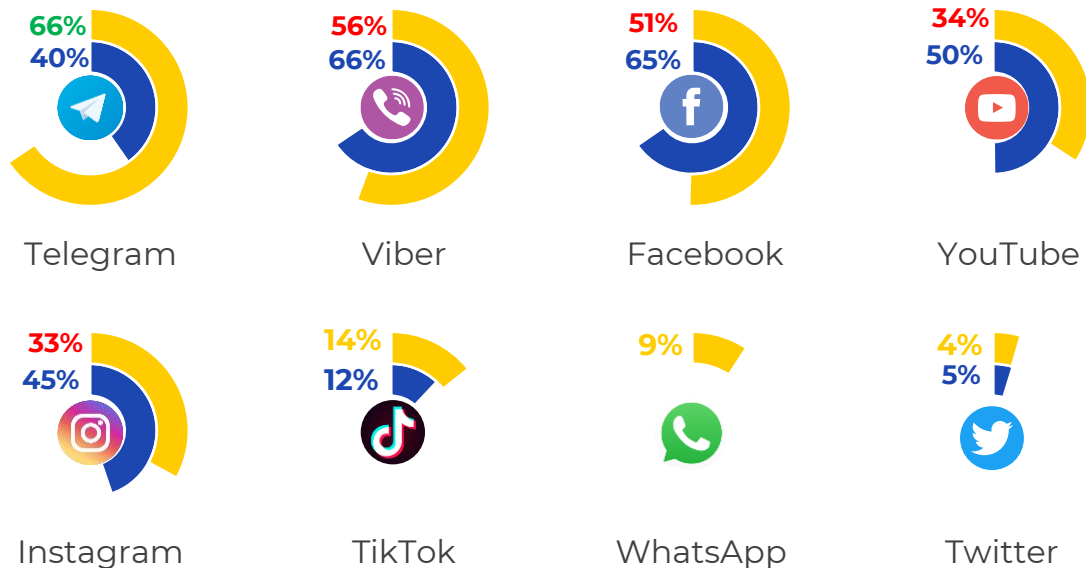
INHABITANTS OF TEMPORARILY OCCUPIED TERRITORIES and/or WHERE THERE ARE HOSTILITIES

Most of the respondents did not have time to watch the National Telethon or due to the disconnection of Ukrainian television. Those who did watch the Telethon do so because they can watch it on TV and do not typically search for it online.

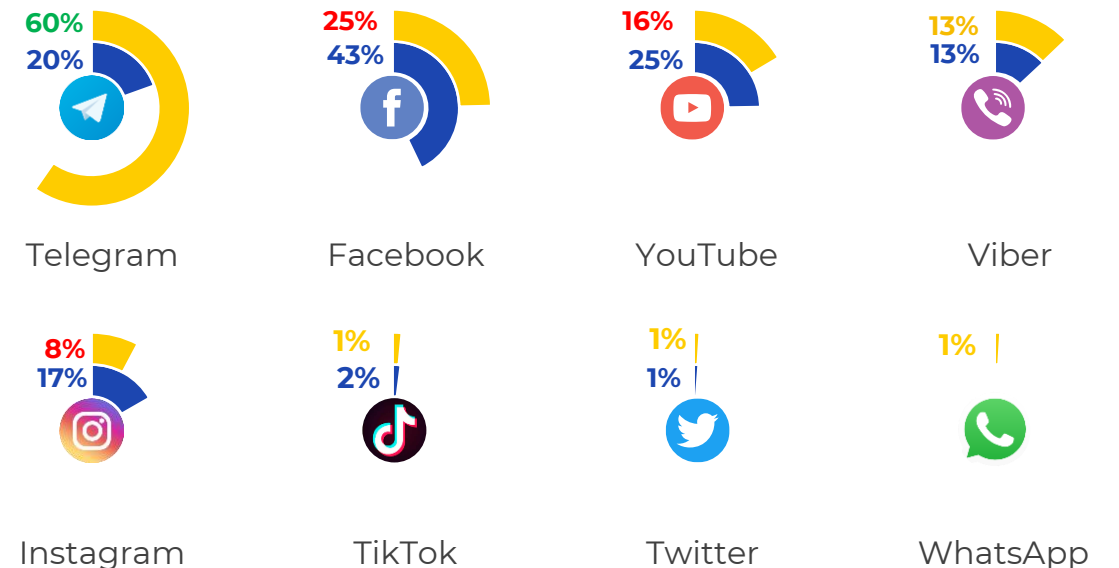
Among the disadvantages of the National Telethon, people in occupied territories noted the lack of a sense of security (*“It is dangerous to watch Ukrainian news on TV – neighbors can hear and inform on me”*) and little information about the temporarily occupied territories, especially about small settlements.

In 2022, Telegram has become the main social network for both communication and news consumption, showing significant growth in both categories. Facebook has reduced its audience reach and has been losing traction in terms of news consumption. Viber has also reduced its audience reach, but its news consumption indicators remain the same.

The use of social networks for communication, 2021-2022



Social media network preferred for getting news, 2021-2022



■ 2022 ■ 2021

Question:
 What social networks do you use for communication at least once a month?
 Which social network do you prefer to receive news?

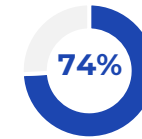
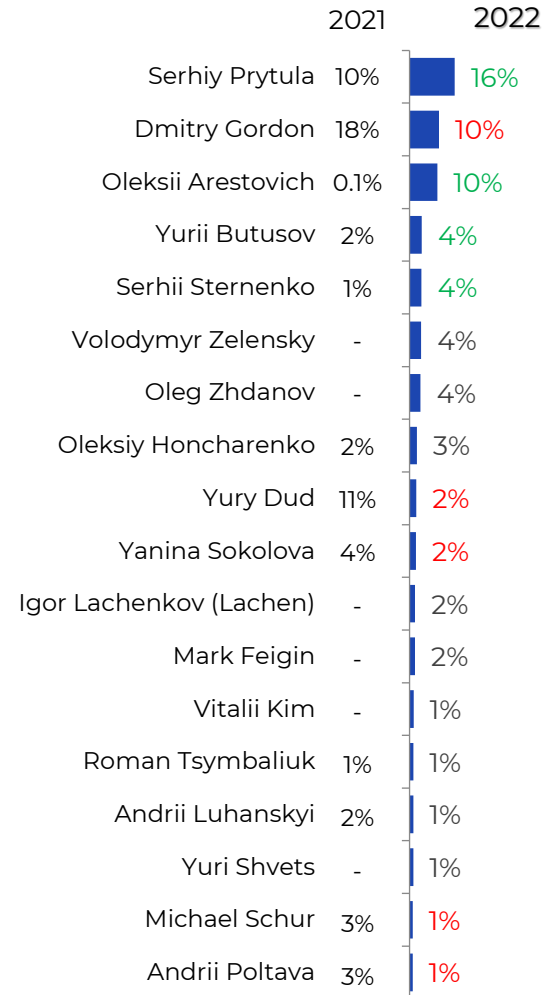
Base:
 Internet users, 2021 N=1,413, 2022 N=1,319
 Social media news consumers, 2021 N=1,358, 2022 N=1,079

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



Bloggers

Which of the bloggers do you read/watch on social networks most often?



Consumers of news from social networks

Question:

Which of the bloggers - public and political figures, activists, opinion leaders - do you read/watch on social networks most often, who are you subscribed to?

Base:

Consumers of news from social networks
2021 N=1186, 2022 N=1079

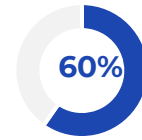
x / x - significantly more / less at 95% compared to the previous wave

Telegram

Indicate up to three national **Telegram** channels which you most often use to read/watch the news?
(among consumer of news from social networks who prefer Telegram)



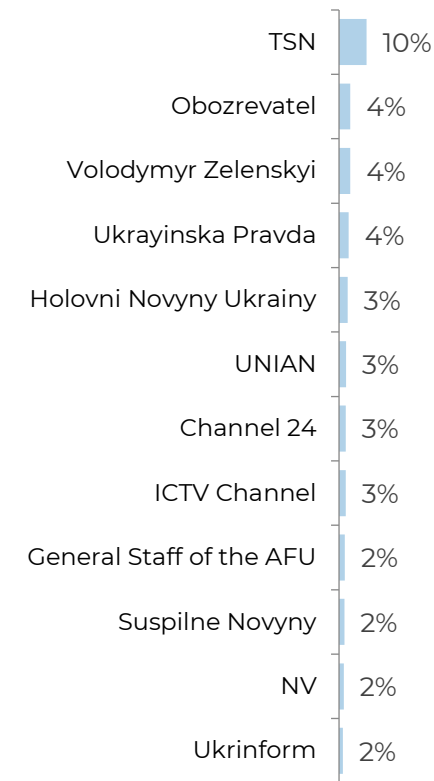
N= 506



Consumers of news on social networks who prefer **Telegram**

Facebook

Indicate up to three national **Facebook** pages / channels which you most often use to read/watch the news?
(among consumer of news from social networks who prefer Facebook)



N=198



Consumers of news on social networks who prefer **Facebook**

Question:

Indicate up to three national webpages / channels which you most often use to read/watch the news?
(similar question for Facebook /YouTube/Viber)

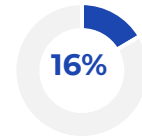
Base:

Consumers of news from social networks who prefer the relevant social network to receive news

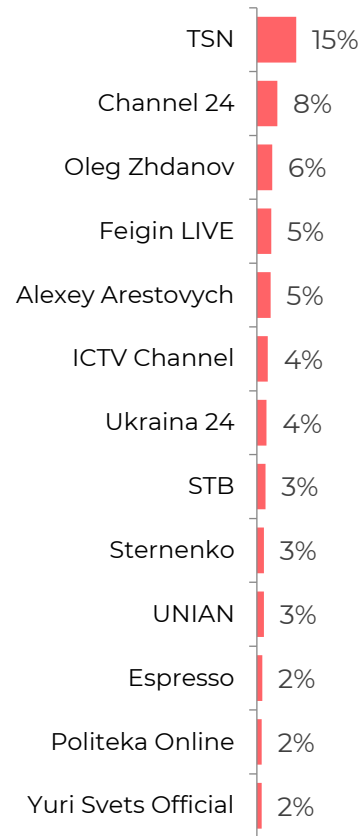


YouTube

Indicate up to three national **YouTube** pages / channels which you most often use to read/watch the news?
(among consumer of news from social networks who prefer YouTube)



Consumers of news on social networks who prefer **YouTube**

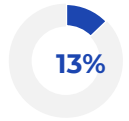


N=142

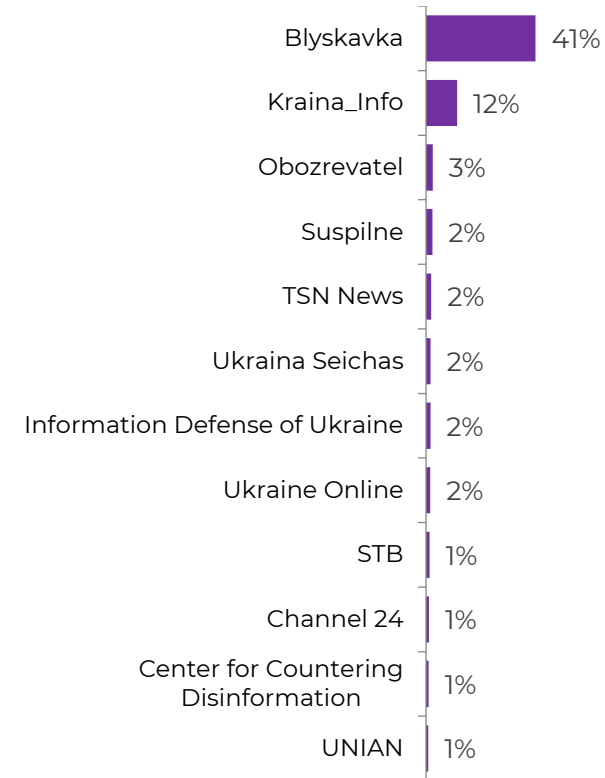


Viber

Indicate up to three national **Viber** pages / channels which you most often use to read/watch the news?
(among consumer of news from social networks who prefer Viber)



Consumers of news on social networks who prefer **Viber**



N=104

Question:

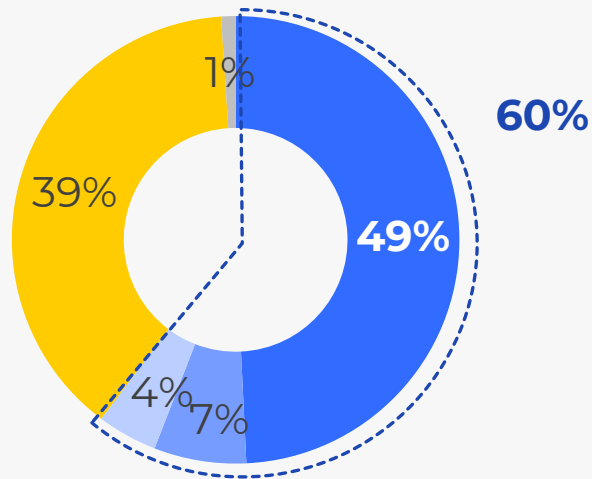
Indicate up to three national webpages / channels which you most often use to read/watch the news?
(similar question for Facebook /YouTube/Viber)

Base:

Consumers of news from social networks who prefer the relevant social network to receive news

Almost half of social media users consume news posted by their friends and family members in group chats. At the same time, only one in three people personally share news content with their friends and family in groups on social networks.

Consumption of news shared by personal network in group chats
(chats with friends and family)

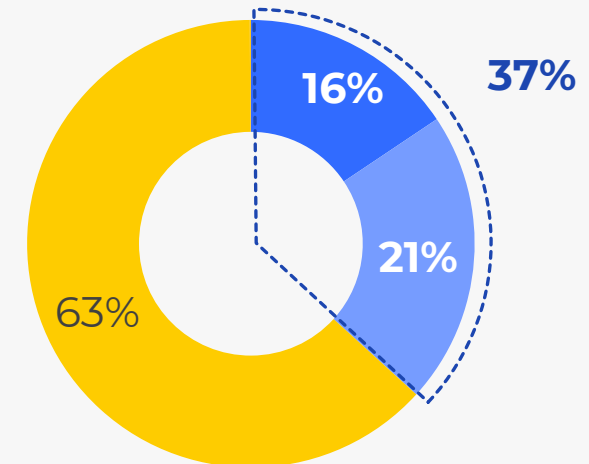


- Hard to say
- No, I'm not a participant of any group chat
- Yes, I read/watch news in group chats
- No, I scroll past the news I see in group chats
- No, my friends and family don't share news in group chats

Group chat participants

Among the participants of group chats

Personal posting of news in group chats
(chats with friends and family)



- Hard to say
- No, I don't post news in group chats
- Yes, I often actively share news with my friends and family
- Yes, occasionally - I only share very important / urgent news

Those who share news

Question:

Do you read/watch news shared by friends and family in group chats on social networks (chats of relatives, friends, neighbors, colleagues, fellow students)?

Do you personally post news in group chats, repost news channels/pages in such chats?

Base:

Those who use social media for communication, N=1,278
Group chat participants, N=770

(by focus groups results)



Telegram has become the main channel for receiving news. Focus Group participants say the main advantage is the promptness of news. It satisfies two functions at a time - communicating with loved ones and receiving information. Respondents note that after they started using Telegram as a source of news, they switched to it from Viber and WhatsApp as the main messengers for communicating with friends and relatives. In the first months of the full-scale war, people subscribed to a large number of Telegram channels (up to 10), but since August respondents say they reduced their subscriptions to two to three news channels.



Facebook is more often used for learning the attitude to a certain news story. Respondents look at how much the news resonates in the community, as well as what comments the news generates.



YouTube is used instead of TV and for searching for videos that confirm something about a news report of interest, and for watching bloggers.



Viber is a messenger for communication. Respondents note the presence of news groups in it - first of all, it is Viber channel "Blyskavka" - popular among 45+ but criticized for the large number of publications (more than 200 per day).



Instagram is increasingly coming out of the "youth" group and is more often spoken about by the 31-45 age group. Respondents note that it has changed dramatically from an entertainment platform to a news platform, as well as for expressing a civic position.



Tik Tok - respondents know what it is, and it is quite popular among young people. It is primarily used for entertainment purposes.



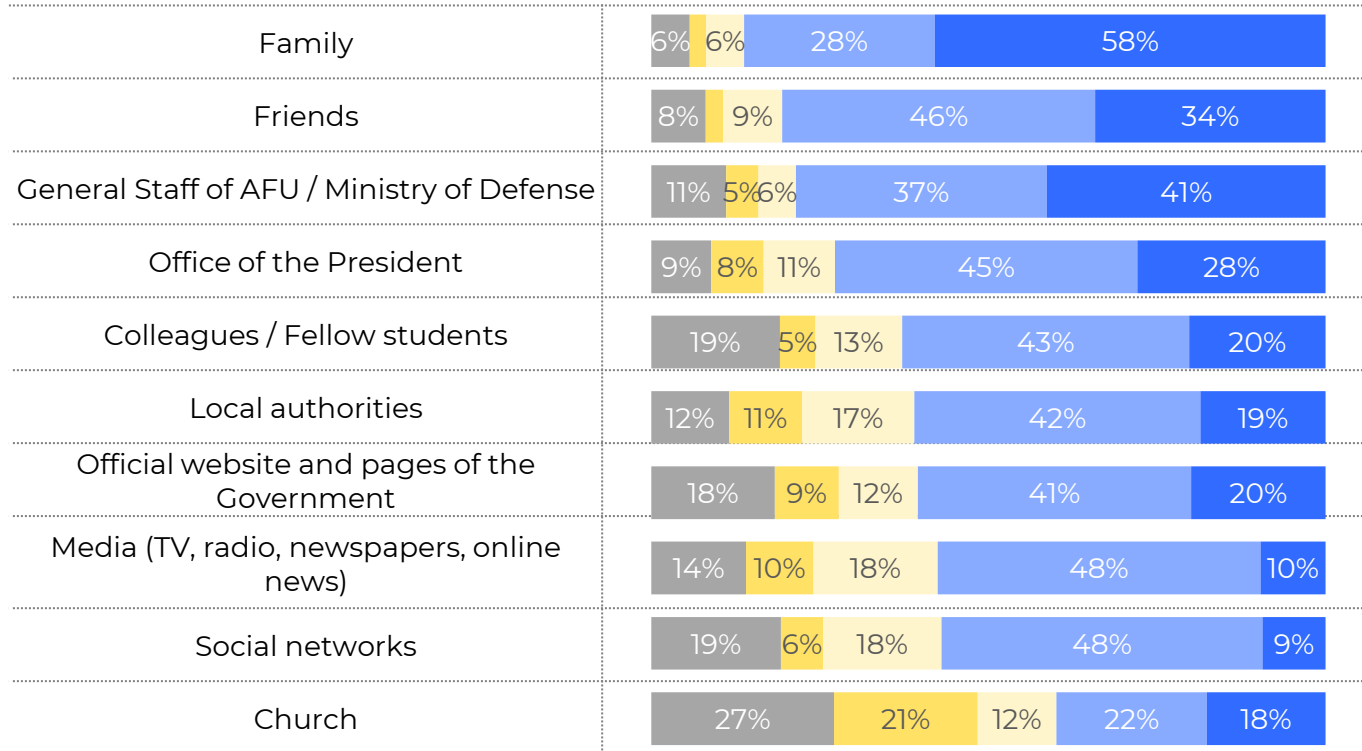
Bloggers are most often used not to receive news, but rather to form an assessment of this or that news.

Group chats are not so much used to receive news as to review the reaction of society to news. Group chats are more often used by youth, where it receives either support or refutation of information.

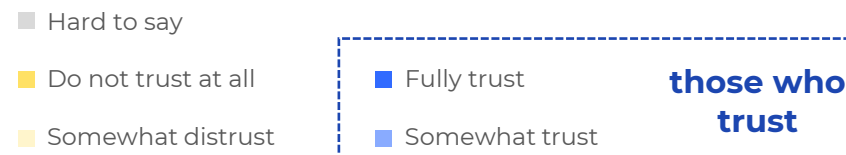
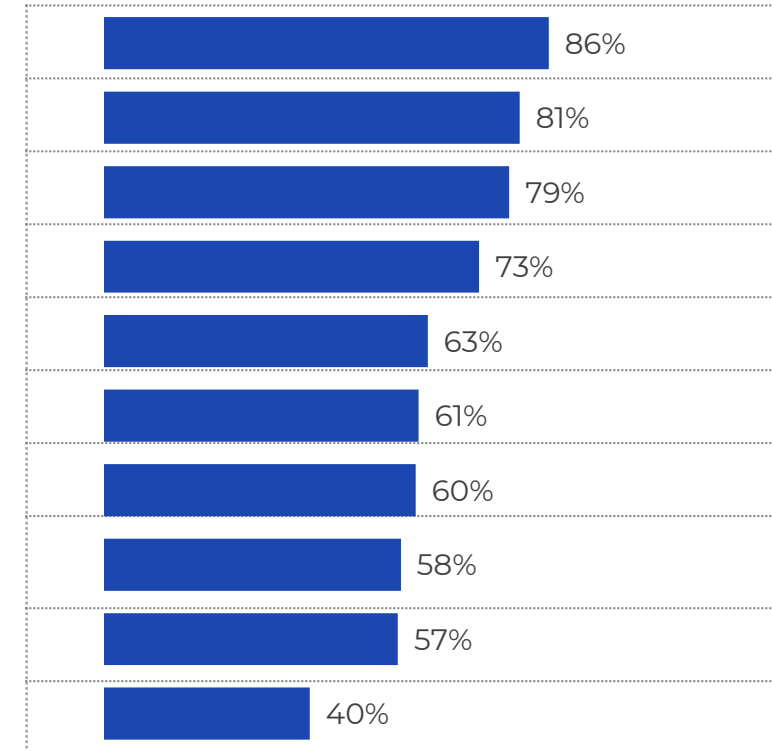
Trust in Information Sources

In general, the most reliable sources of information for the respondents are family and friends, as for the authorities, the most trusted are the General Staff of the Armed Forces of Ukraine/Ministry of Defense and the Office of the President of Ukraine.

Trust in sources, 2022



% of those who trust



Question:
To what extent do you generally trust information from the following sources...?
% of those who trust completely or in part

Base:
Total sample, N=1,456

The most trusted news sources are the most popular ones – about 60% of respondents trust news on social networks, almost half trust news online and national television news.

In 2022, the level of trust in internet sites – both national and regional, as well as in national TV has increased, whereas all types of the press have been losing ground.

Channels in social networks

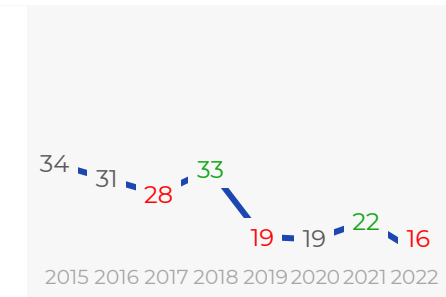
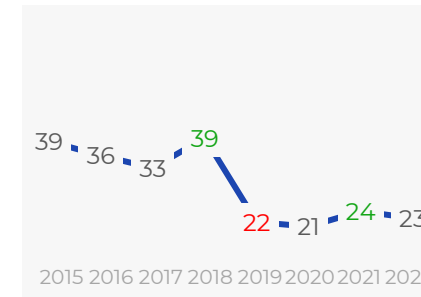
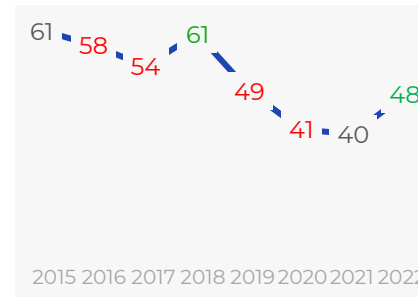
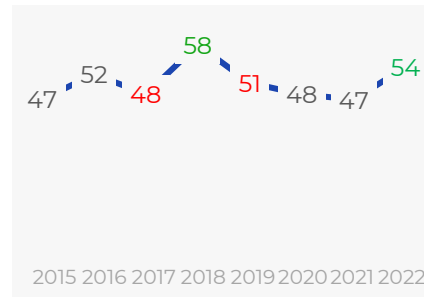
Online media

Television

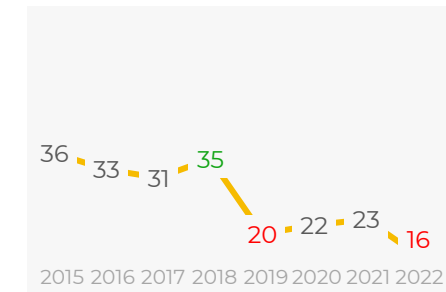
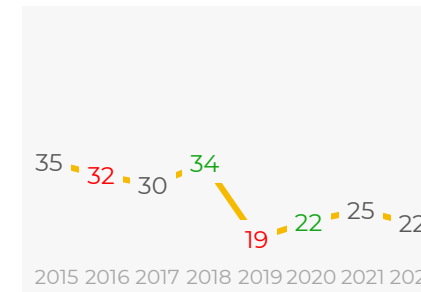
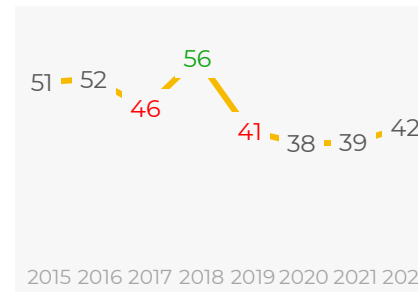
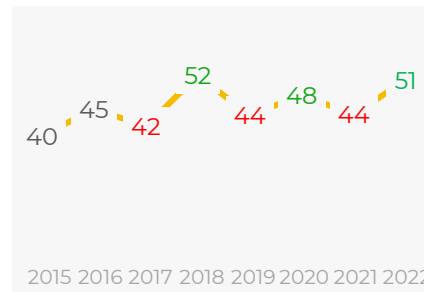
Radio

Print media

National



Regional



Question:

To what extent do you trust the news in...? % of those who trust completely or in part
 *Media are ranked by rating - from the media with the highest level of trust to the media with the lowest level of trust

Base:

Total sample, 2015-2021, N~1,600/wave
 2022 N~1,450

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

(by focus groups results)



Respondents' opinions split regarding their trust in media (regardless of age and region). Some respondents talk about low trust in all types of media, because in wartime the media are *“unable to present the truth a priori.”* Also, skepticism about the news is growing due to mismatch of facts in media reports and what respondents learn directly from personal communication - this often leads to a situation that respondents explain as follows: *“In the media, everyone is lying or understating, because my relative/acquaintance from the scene of the events says something completely different.”* Other respondents, on the contrary, believe that trust in the media has increased, because during the war one cannot tell a lie.



The main requirements for news that evokes trust are:

- Promptness - due to military operations, this characteristic has become critically important,
- Maximum objectivity, honesty,
- Availability of photo and/or video (of any quality, preferably even without editing),
- Availability of basic details: what, when and where it happened,
- Absence of manipulation, emotional delivery of news, maximum impartiality.

It is also possible to observe an increase in the level of trust in the media, because, as respondents say, the war united everyone.

(specificities of special population groups by focus group discussions and in-depth interviews)



INTERNALLY DISPLACED PERSONS

IDPs described low trust in all types of media. First of all, they put it down to the fact that many people saw things firsthand, and their personal impressions do not coincide with the way they were covered in the media. Likewise, there is growing skepticism about the news because of the discrepancies in the facts from media reports and those that the respondents get directly from personal communication – this often leads to a situation that IDPs explain in the following way: *“In the media, everyone lies or doesn’t tell the whole truth because I personally / my friends / relatives saw something altogether different.”*

According to IDPs in the focus groups, the only channels which provide verified information are the General Staff of the Armed Forces of Ukraine, and senior government officials, and these sources have the highest level of trust.



INHABITANTS OF TEMPORARILY OCCUPIED TERRITORIES and/or WHERE THERE ARE HOSTILITIES

Most respondents trust the news they receive and the channels from which they receive it. In most cases, confidence in the media during the war has increased, although it had been at a high level before.

Occasionally, there are signs of mistrust in the Ukrainian media due to personal traumatic experience (disinformation about the hometown spread in the media that the respondent saw firsthand are not true, high-ranking officials promised detailed information about prisoners, but in fact none was given) and because of the high level of propaganda (although most believe that today it is necessary).

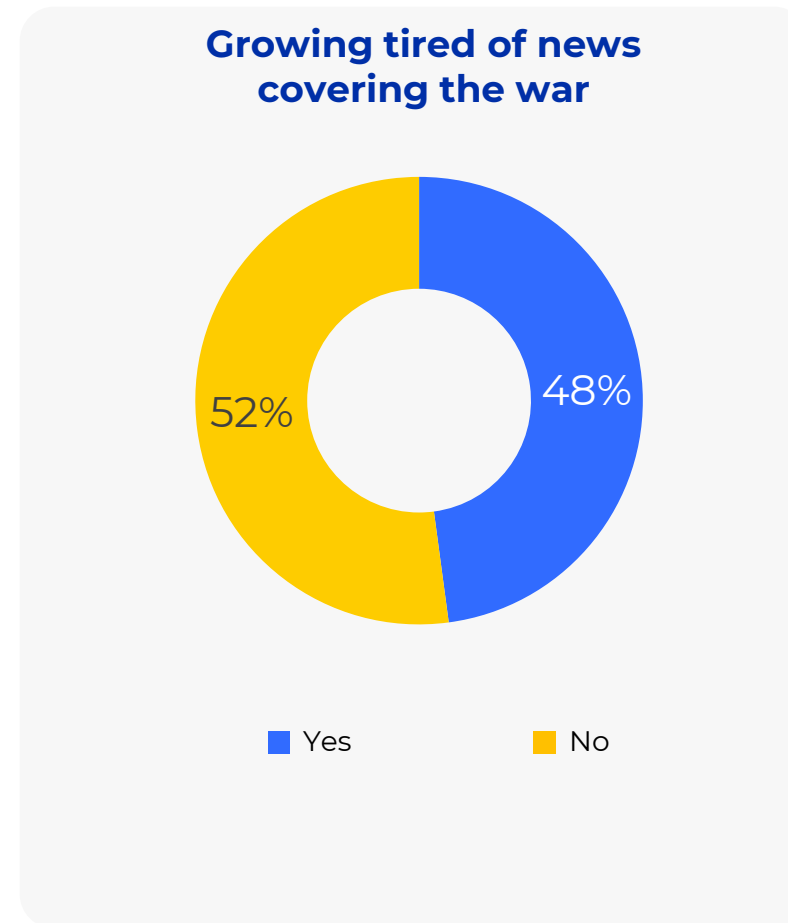
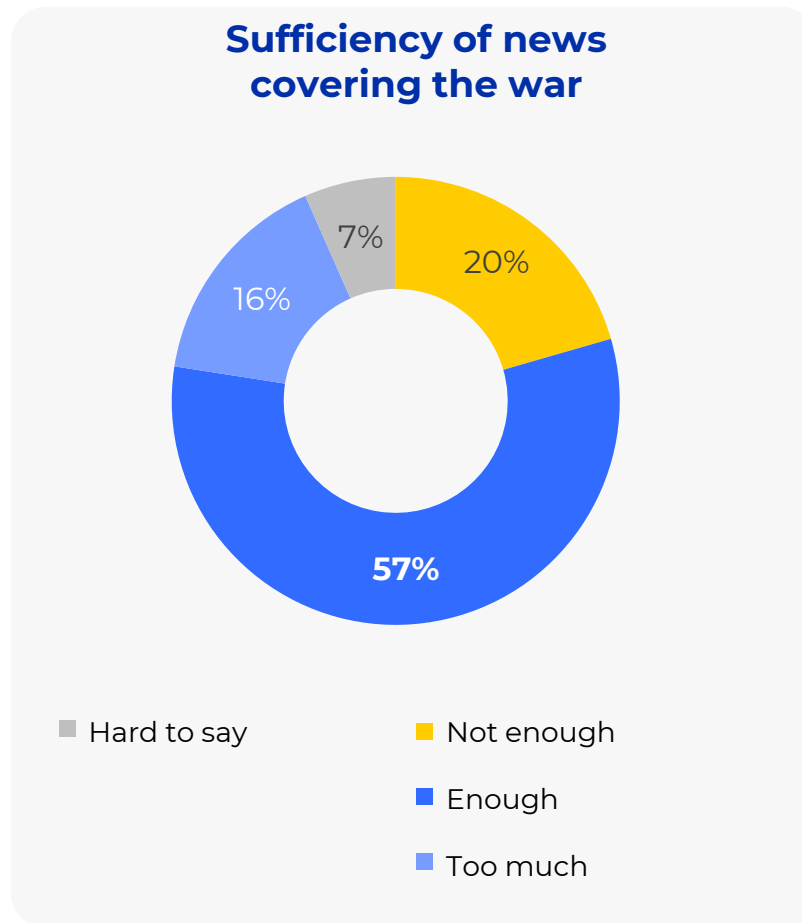


RURAL INHABITANTS

An additional attributes of trustworthy news for rural inhabitants are the reputation of the source and its presence on the market for a long time. For example, residents of the villages of the Western region noted that Suspilne TV channel was watched before the war and is now preferred during the telethon.

Assessment of News Covering the War in Ukraine

The vast majority of respondents - 73% - believe that they get enough content covering the war, while one in five would like more coverage.



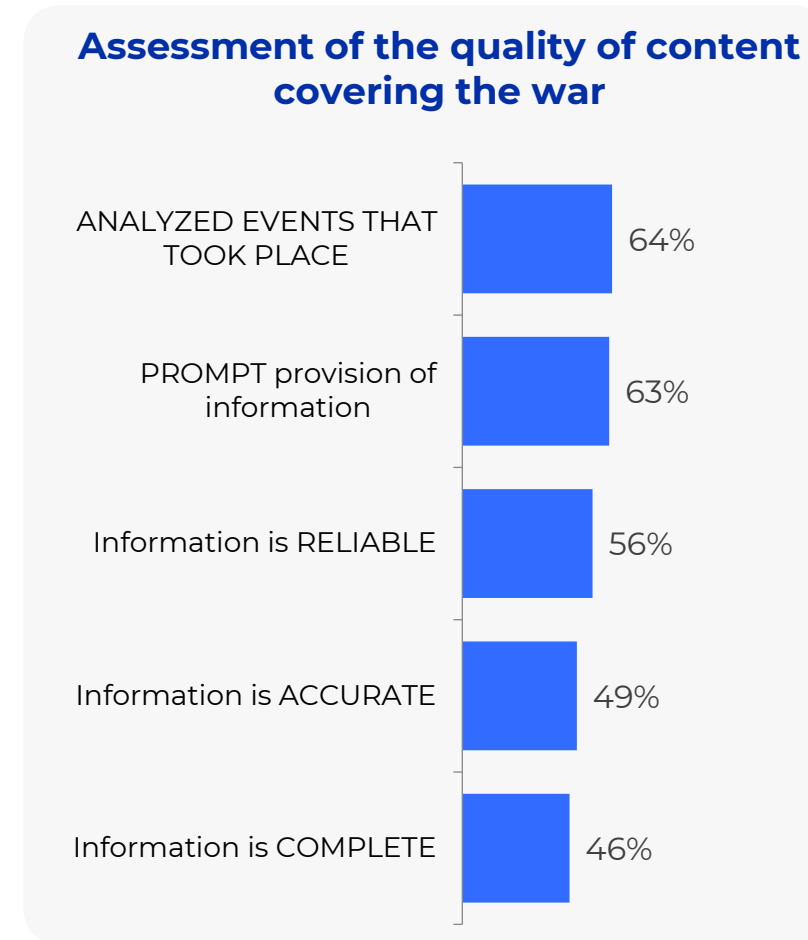
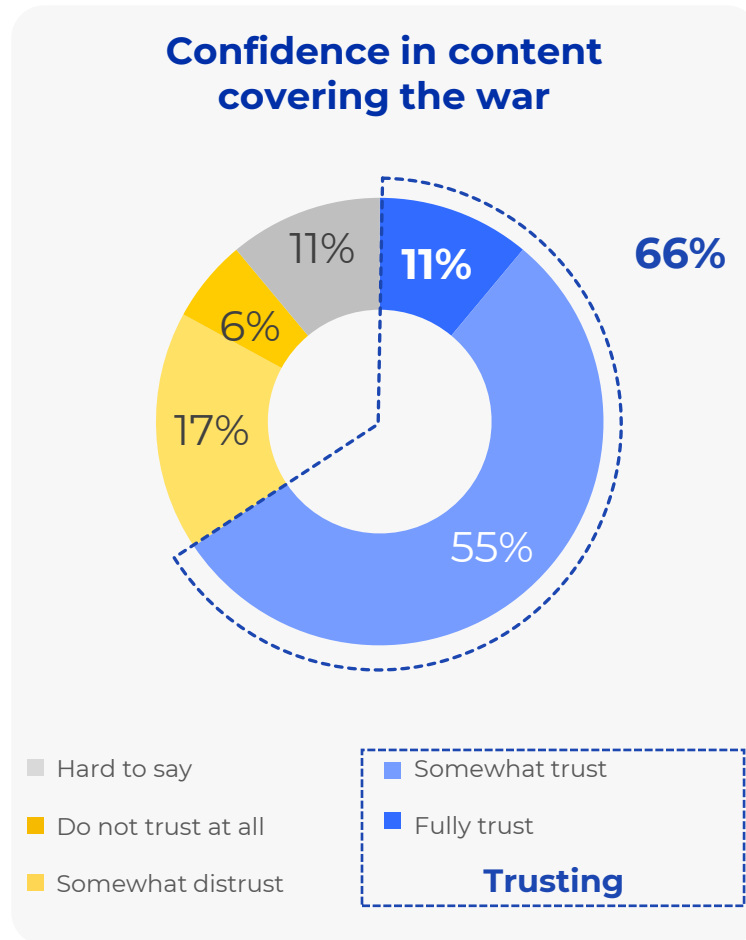
Question:

Do you think there are enough reports in the media covering the war in Ukraine (the course of Russia's full-scale invasion of Ukraine)?
Do you feel tired of the media coverage of the war in Ukraine?

Base:

Total sample, N=1,456

Most of the respondents trust the content that cover the war, and believe that they offer high-quality analysis of events, provide prompt and reliable information.



Question:

To what extent do you trust the reports / content in the media that cover the war in Ukraine?
Please rate whether the media reports / content covering the war in Ukraine meet the following criteria?
- % of those who agree completely or in part

Base:

Total sample, N=1,456

(by focus groups results)



Respondents are generally satisfied with the volume of information about the war. They say the news has become more detailed and large number of news channels have appeared (websites, Telegram channels, etc.).

It is also noted that the news has become more "human" and emotionally rich, since the presenters themselves do not hide their emotions and worries about the fate of the country (*"The presenters are not like robots, but their humanity is visible"*).

There is a request from respondents for such information as: the life of Ukrainians on the front line (*"how do ordinary people survive?"*); information from the occupied territories; current information on the front, as objective as possible; the country's economy and social issues: population support, housing and communal services; the work of volunteers (*"Not only about Prytula, but also about other volunteers"*); the economic situation in Russia after the introduction of sanctions; news about events in the world.

However, Focus Group participants said they felt the presence of censorship in the news. They said that media do not provide information about the number of Ukrainian soldiers killed, the amount of equipment provided to Ukraine, etc. However, they also have understanding for such censorship, noting that not everything can be told in the media (*"there is a military secret"*).



Regarding the fatigue of the news about the war, the opinions of the respondents split (regardless of age and region). Some respondents noted that they feel emotional fatigue from war news, but despite this, they still feel the need to watch it (*"I want to distract myself," "I can't be in the news about the war all the time, I have to earn money, live an ordinary life"*). While other respondents do not feel tired (*"There is a war, and it is not going anywhere, how can you be tired of it?"*).

"Information overload" could be observed in some respondents, when 24/7 immersion in the information flow emotionally exhausted them and forced them to switch from chaotic consumption of news to a more orderly one. So, in the first months of a full-scale war the number of sources and news channels was very large (up to 10), now the respondents use two to three news channels.

(specificities of special population groups in focus group discussions and in-depth interviews)



INTERNALLY DISPLACED PERSONS

The quality of the information received is generally rated as satisfactory, respondents have a large demand for up-to-date information from the frontline, as objective as possible, predictions concerning the liberation of the occupied territories. Also, respondents point to a lack of positive news *“from peaceful life”*: they cannot specify their expectations but express a need for such news.

Most of Focus Group participants did not note the fatigue and did not reduce news consumption even six months after the start of the full-scale invasion.



INHABITANTS OF TEMPORARY OCCUPIED TERRITORIES and/or WHERE THERE ARE HOSTILITIES

Respondents think that the amount of news and information they receive is sufficient, even claim that sometimes there is too much information. But there is a lack of:

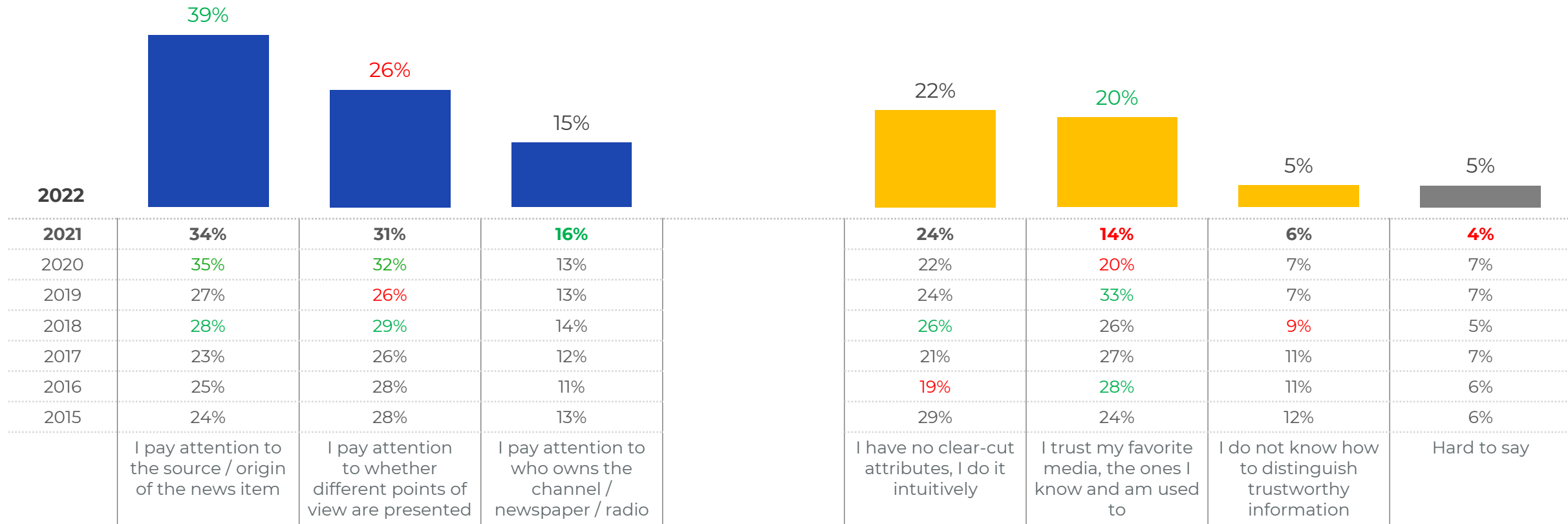
- news about the real picture on the front and strategic plans – people want to be able to somehow plan and predict their lives, although everyone understands that this information is classified and not subject to disclosure in the media;
- vital/routine information on the temporarily occupied regions – what to do if a pipe bursts, where to go to get help, how to make an appointment with a doctor, etc.

Also, it is important for people to see more information about the occupied cities – it is important to feel that they have not been forgotten, that there is a struggle for them. It helps them not to lose hope and faith. *“We saw an ad where our Berdyansk was shown, and the speaker said that we are Ukraine, that we are together, this made me cry! We're haven't been forgotten! It really gave me strength to pull myself together.”*

Media Literacy

In 2022, the share of news consumers who pay attention to the source of information has increased. At the same time, fewer respondents pay attention to whether different points of view are represented, and the share of those who are willing to trust their favorite media "by default" has increased.

On what grounds do you determine whether you can trust information in the media? 2015-2022



Question:
On what grounds do you decide whether you can trust news / information in the media?

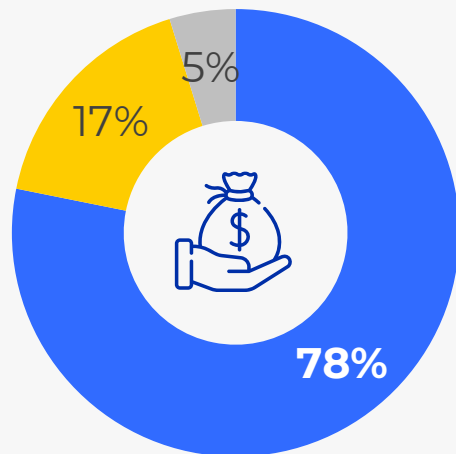
Base:
Total sample, 2015-2021, N~1,600/wave
2022 N~1,450

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

Awareness, ability to distinguish

Most respondents know about the existence of sponsored content, almost 70% of those familiar with it believe that they can distinguish such content from real news.

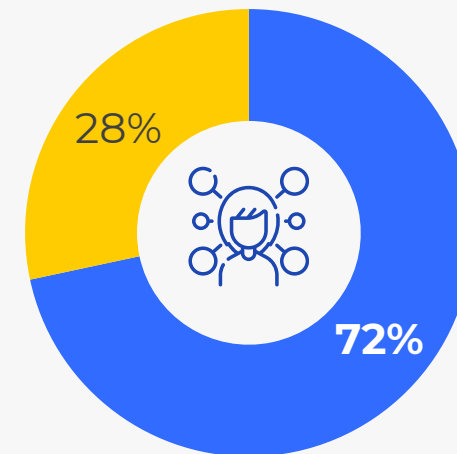
Awareness of sponsored content



■ Aware ■ Not aware ■ Hard to say

Of those who are aware

Ability to distinguish (self-rated)



■ Can ■ Cannot

Question:

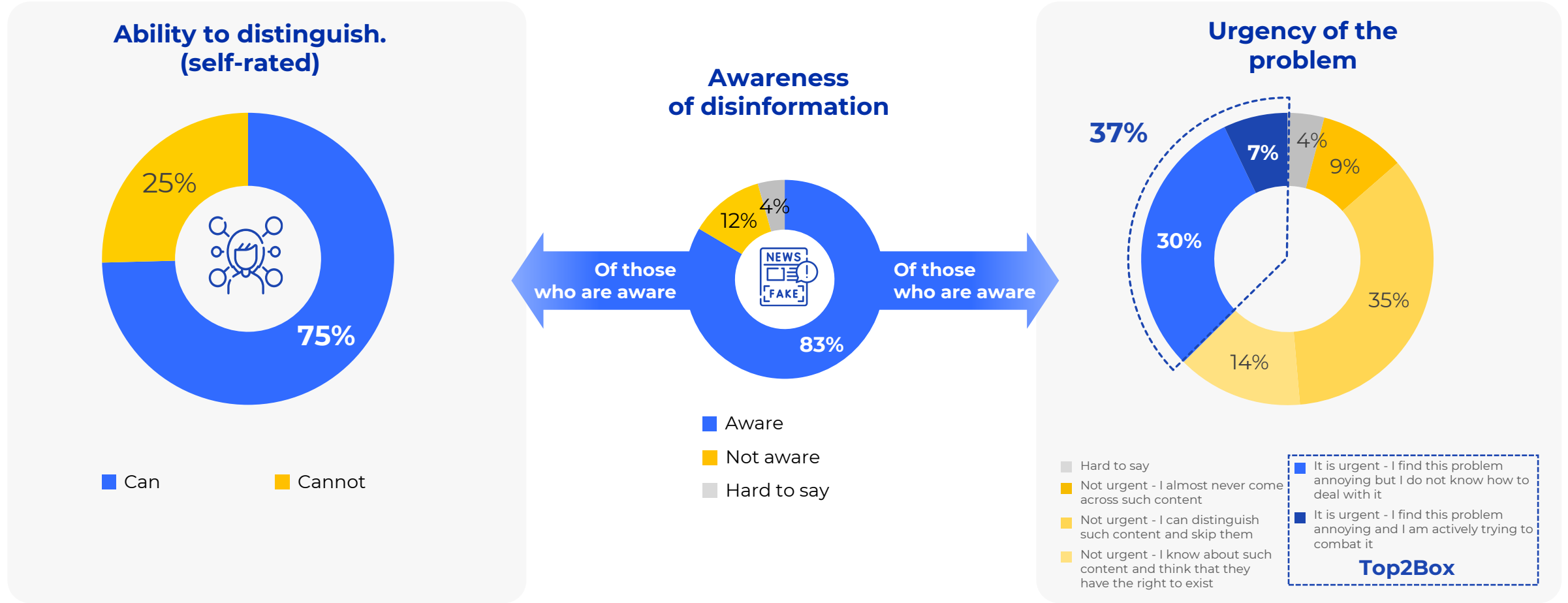
Do you know that sometimes the media publish paid / sponsored content, covert advertising presented as ordinary one?
In your opinion, can you distinguish such content from ordinary ones?

Base:

Awareness, total sample, N=1,456
Ability to distinguish, only those aware of it, N=1,138

Awareness, ability to distinguish

83% of respondents know about the existence of disinformation. Of those who know about such content, almost 3/4 claim that they know how to distinguish unreliable content from truthful. This level of confidence encourages people to think that the problem is not particularly critical: only 37% of those aware of the problem of disinformation consider it urgent.



Question:

Do you know that the media sometimes publish disinformation presenting them as ordinary ones?
 Can you distinguish disinformation from ordinary one?
 How topical do you find the problem of disinformation in the media?

Base:

Awareness, total sample, N=1,456
 Ability to distinguish and urgency, only those aware of it, N=1,216

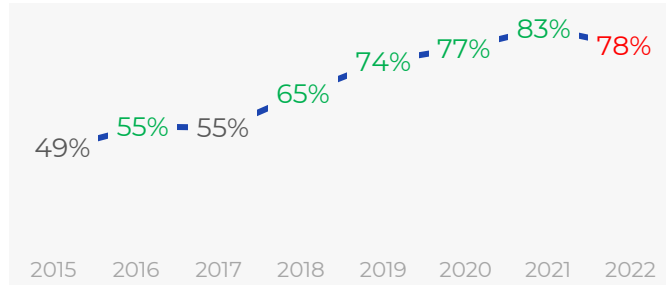
The rate of awareness of the existence of hidden advertising has bounced back to the level of 2020, whereas the awareness of disinformation remains the same.

At the same time, the share of the respondents who believe that they can spot both sponsored and false content has increased.

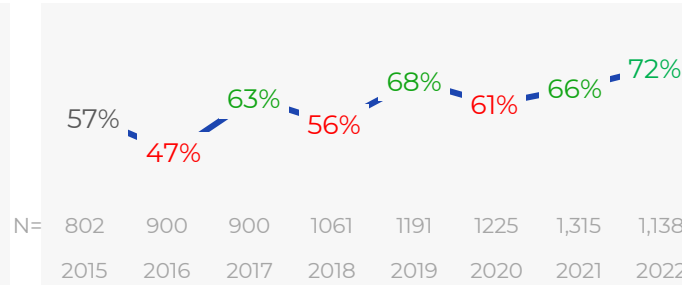
Sponsored content

Disinformation

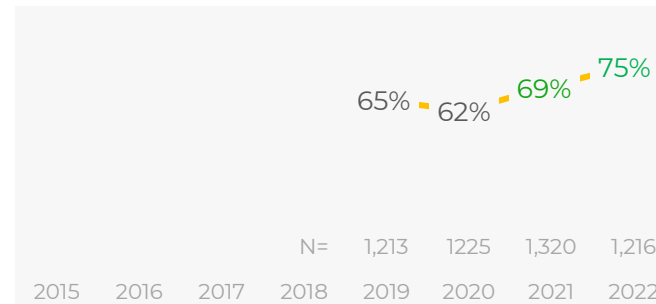
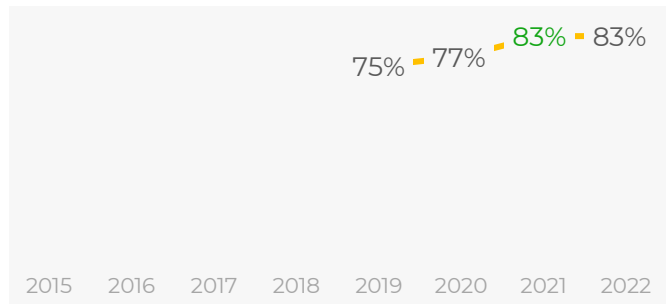
Awareness



Ability to distinguish (self-rated)



Relevance



Question:

Did you know that the media sometimes publish... as ordinary content? - % of those who know
 In your opinion, can you distinguish such content from ordinary ones? - % of those who think they can
 How relevant is the problem of disinformation in the media for you? - % of those for whom the problem is relevant

Base:

Total sample, 2015-2021, N~1,600/wave
 2022 N~1,450
 Ability to distinguish, relevance - only those who are aware of it

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

(by focus groups results)



Respondents note that they often come across sponsored content and disinformation in the media. The attitude towards this is negative, because they create a distorted perception of the current situation.



Respondents named the following criteria by which they can distinguish disinformation:

- A catchy headline,
- Emotionally colorful text,
- Unknown source / only one source
- Incomplete information, lack of details, inaccuracy of figures ("number of dead", "number of weapons"),
- Low-quality analysis of events (for respondents, this means the inability to hear the opinions of various experts, analysts who can not only clarify a specific event, but also indicate its causes and what consequences it will lead to),
- There is no information from the scene.



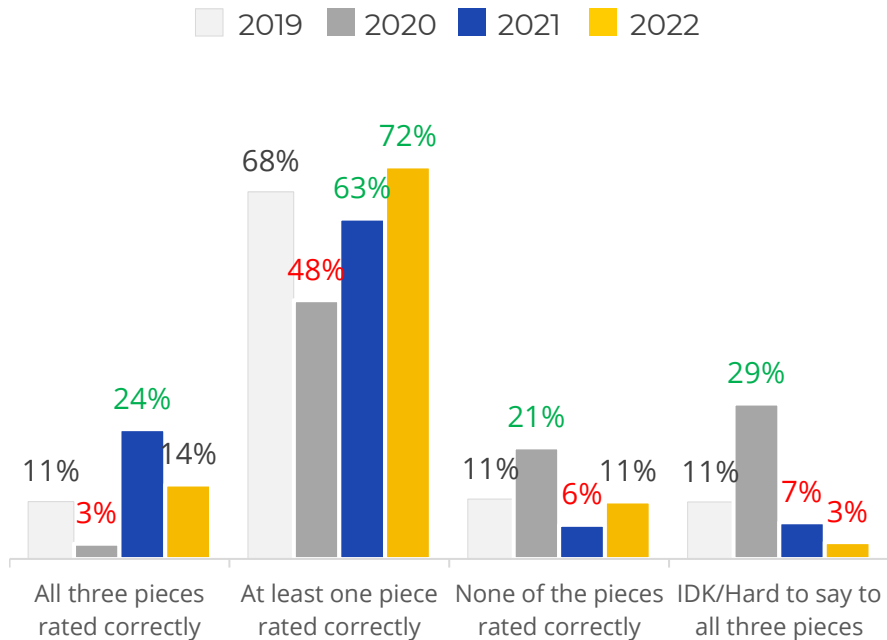
Respondents claim that they can easily distinguish sponsored content and disinformation in the media. But it is important to note that despite knowing about the above possible criteria, respondents tend to rely on their intuition when determining disinformation.

Among those who are aware of the existence of disinformation, 14% of respondents managed to correctly identify all the news pieces, another 72% correctly identified at least one news item.

Respondents made the least mistakes when rating the news report about the survey of children about their military and patriotic sentiment – almost ¾ of the answers were correct, the news report about the ban on Russian music and books was correctly rated by half of the research participants, the least correct answers were given with regard to the news about the coronavirus vaccine.



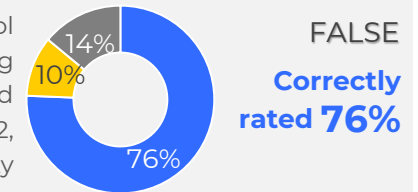
Ability to distinguish (actual assessment)



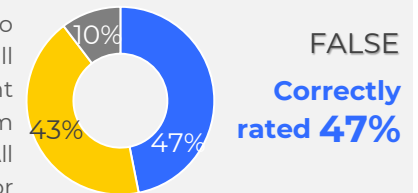
News pieces rated by respondents in 2022

■ Correctly assessed
■ Incorrectly assessed
■ Hard to say

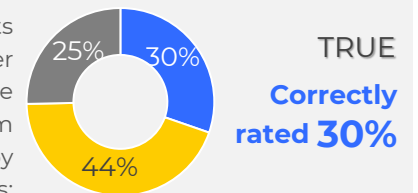
According to a Facebook post by blogger Petro Pavlychenko, the Ministry of Education and Science of Ukraine sent a letter to all educational institutions to collect lists of high school and 1-2-year university students and assess the military and patriotic sentiment among children. Form tutors and academic advisors will have to interview adolescents and students concerning what they think about the events in Ukraine after February 24, 2022, and their readiness to serve in the army. The President of Ukraine Volodymyr Zelensky signed an order to hold the survey, because the AFU urgently need new soldiers.



All Russian music and books were banned in Ukraine, as reported in the Telegram channel "What's New in Ukraine". The new law, approved by the Verkhovna Rada, prohibits listening to Russian music and watching videos of all Russian artists in Ukraine. From now on, Ukrainians will not be able to hear Russian music on the radio, in public places and even at home. To prevent children from studying hostile literature, all books by Russian authors will be removed from school and university curricula. Ukrainians have been forbidden to keep books in Russian. All books in Russian will be removed from bookstores and libraries. Penalties will be imposed for non-compliance with the law.



Ukrainian Pravda and BBC Ukraine report that the American company Moderna says that its vaccine proves effective in combating the coronavirus in senior people – 71 years and older. After 28 days, all the elderly people involved in trials developed immunity to COVID-19. After the vaccination, the volunteers developed the necessary antibodies, and they are no different from the flu vaccination with regard to side effects. The side effects of the vaccine recorded by scientists include fatigue and headache. Only two volunteers experienced severe side effects: one developed fever.



Question:

Next, please read excerpts of some news stories. Read them and indicate which one(s) is (are) false and which are true.
 The test news pieces were prepared by media community experts (Detector Media, Institute of media, Internews Ukraine, Academy of Ukrainian Press, Pylyp Orlyk Institute for Democracy, Texty and Bez Brekhni). Internews and InMind selected samples for pre-testing in focus groups. Based on the pre-testing results, three pieces were selected for the national study.

Base:

Those aware of disinformation, 2019, N=1,213, 2020, N=1,225, 2021, N=1,320, 2022, N=1,216

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

(by focus groups results)



The news that the Ministry of Education and Science of Ukraine sent a letter to all educational institutions instructing them to collect lists of high school students and assess the military-patriotic attitudes of children provoked a sarcastic response from Focus Group participants. They noted that this is possible only in Russia, but not in Ukraine.



The news about the banning of Russian books and music not only in public spaces, but also in private spaces, caused discussion. Respondents say that part of the news is true – some Russian content is prohibited in the public space, and the other part of the news is false - in private space you can consume any content, including Russian.



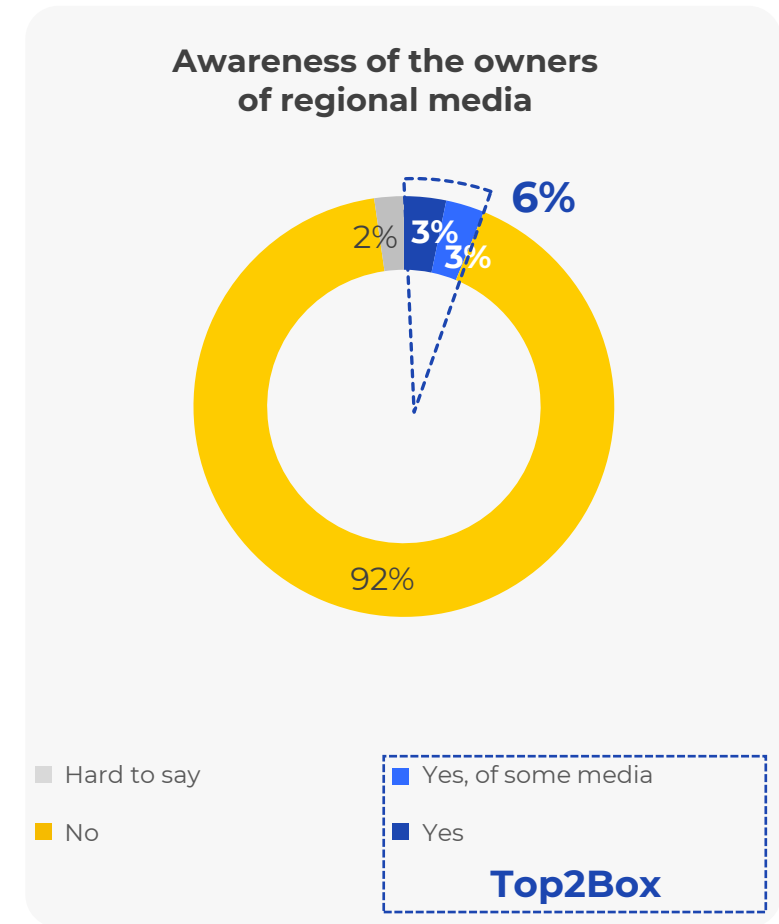
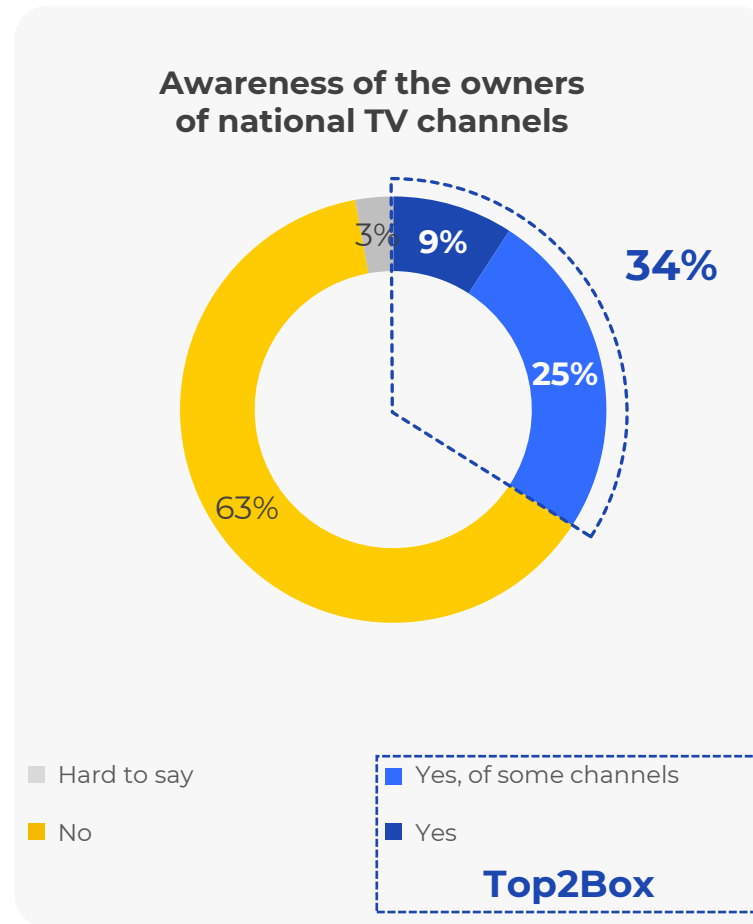
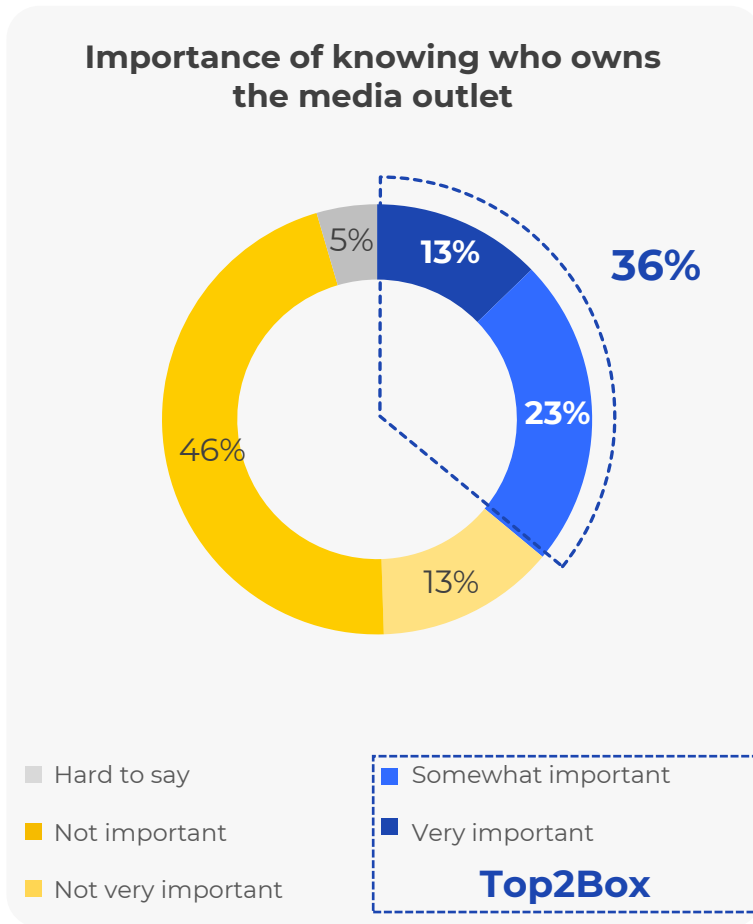
Most often, errors in establishing whether information was true or false related to the true news story about the Covid-19 vaccine. Respondents who considered this news to be false, explained it by the fact that all news related to Covid-19 is manipulative and false.

Research participants name the main markers of false news:

- ✓ Lack of original source,
- ✓ The news refers to the words of a blogger and/or a group in a social media,
- ✓ The news is illogical, it contradicts to common sense.

It is important to note that respondents more often paid attention to the text itself, evaluating it as logical or illogical, having common sense or not, than to other markers.

Only a third of the respondents think it is necessary to know who owns the media. This statistic has remained more or less constant since 2015. The share of respondents who actually know the owners of at least some national TV channels is also about a third.



Question:
 To what extent is it important for you to know who owns the media?
 Do you know who owns national TV channels?
 Do you know who owns regional media?

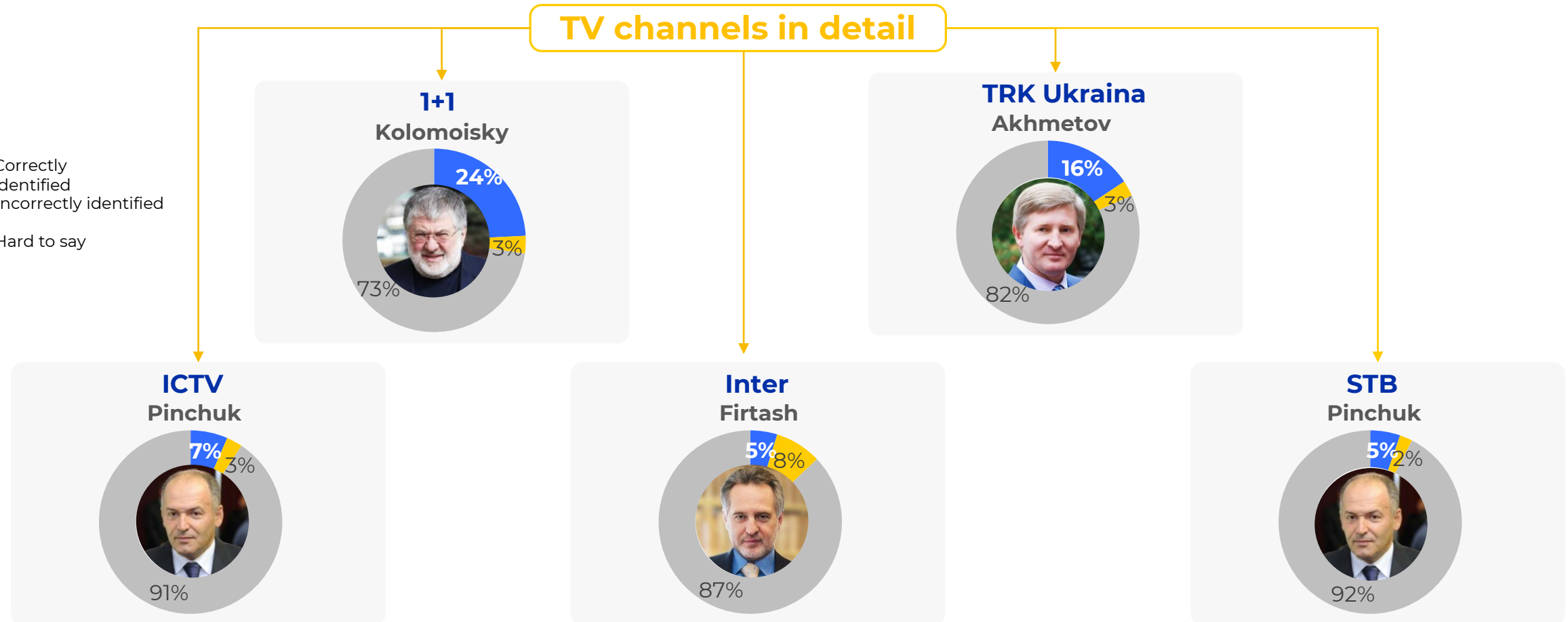
Base:
 Total sample, N=1,456

Almost one in four people know that the 1+1 TV channel belongs to Ihor Kolomoisky, and one in six know that Rinat Akhmetov is the owner of TRK Ukraina. A small proportion of respondents were aware of who the owners of Inter, ICTV and STB are.

Awareness of the owners of national TV channels

TV channels in detail

- Correctly identified
- Incorrectly identified
- Hard to say

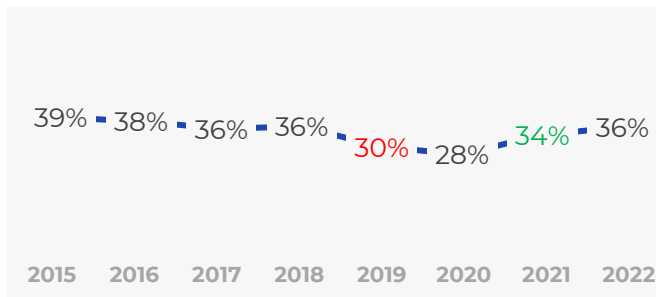


Question:
Do you know who owns national TV channels such as 1+1, TRK Ukraina, Inter, ICTV, STB?

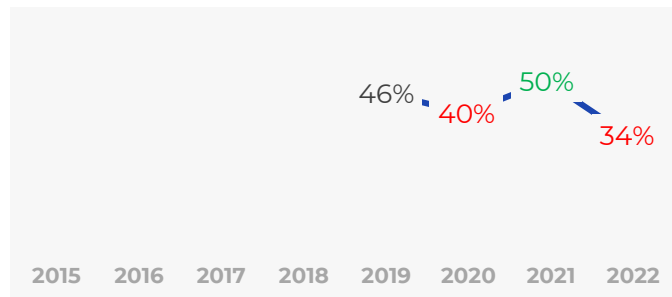
Base:
Total sample, N=1,456

Awareness of the owners of media

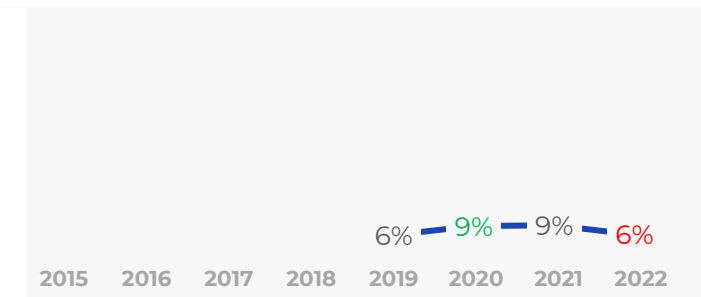
The importance of awareness of who owns the media



National TV channels



Owners of regional media



Question:

To what extent is it important for you to know who owns the media? - % of those to whom it is important
 Do you know who owns national TV channels? - % of those who know (including some)
 Do you know who owns regional media? - % of those who know (including some)

Base:

Total sample, 2015-2021, N~1,600/wave
 2022 N~1,450

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

(by focus groups results)



Respondents note that they do not pay attention to whom TV channels belong, because there is no competition between the channels anymore since the channels have united in the national telethon with a unified content.

According to Focus Group participants, there is a significant decrease in the influence of TV channel owners on editorial policy due to the war (*"War forces everyone to support each other and not be engaged in manipulation"*).

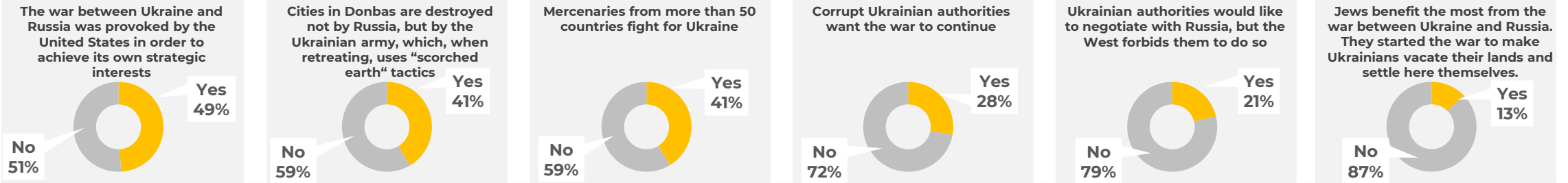


Respondents say, the number of sponsored content has significantly decreased, since there are no elections now (such content often appeared during the pre-election races), and also all TV channels have joined together in the national telethon, in which they think journalists from different channels monitor and control each other.

Debunking False Narratives. 2022

According to the respondents, the most credible narrative is the one that mercenaries from more than 50 countries are fighting for Ukraine, the least believable is the one about cities in Donbas being destroyed not by Russia but by the Ukrainian army. One in three respondents discussed these narratives with their friends and family.

Since the beginning of 2022, have you come across the following statements?



In your opinion, these are:

True False Hard to say

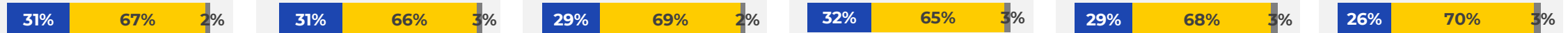
Base: Those who came across the statement



Did you share this statement?

Yes No Hard to say

Base: Those who came across the statement



In what ways did you share and discuss them?

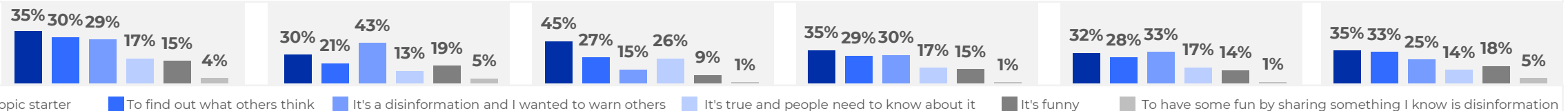
Discussed in a personal conversation Made a repost on social networks Discussed online

Base: Those who shared the statement



Why did you decide to share them?

Base: Those who shared the statement



Question:

Since the beginning of 2022, have you come across any of these statements? Which of them, in your opinion, were true or false?

Did you share or discuss these statements with others?

In what ways did you share these statements / discuss the news?

Why did you decide to share these statements or discuss them?

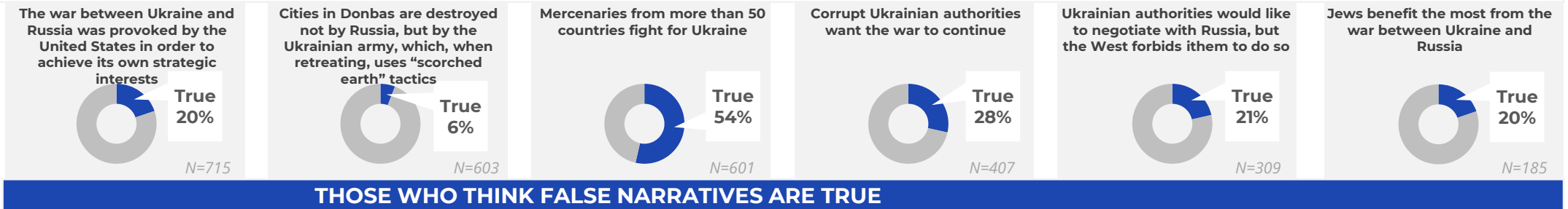
Base:

Total sample, N=1,456
Came across the statement, N=715/603/601/407/309/185
Shared statement, N=222/189/172/129/88/49

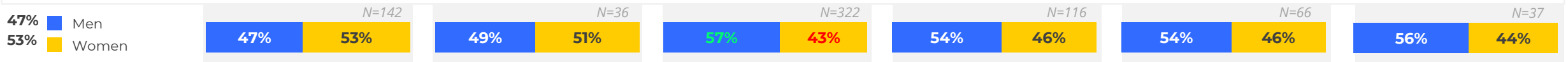
The sociodemographic profile of those who believe false narratives to be true. 2022

There are no major demographic differences between those who believe in disinformation – the shares of women and men are almost the same (except for the narrative about mercenaries which men believed more). Those who believed disinformation were more likely to have higher education than not, particularly the antisemitic narrative (although that was the least believed narrative overall).

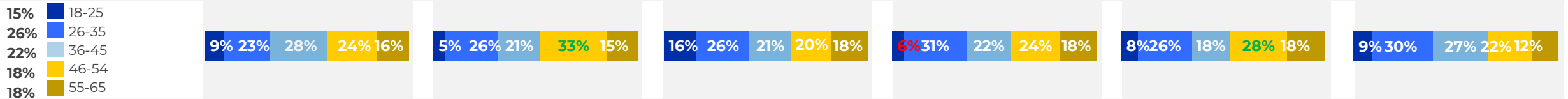
In your opinion, the following statements are:



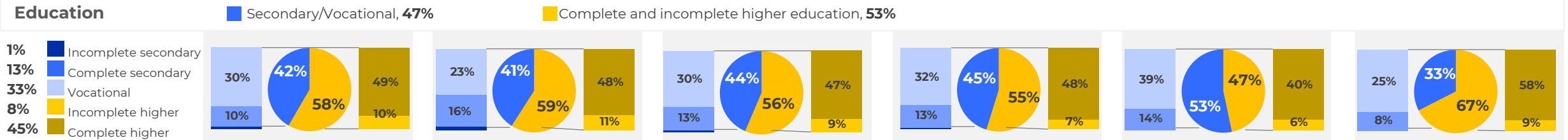
Gender



Age



Education



Question:

Which of these statements do you think were true or false?

x /x – Significantly more/less at 95% compared to the total sample

(by focus groups results)



Respondents identified most of the disinformation narratives as Russian propaganda. For this reason quite often these stories caused indignation among Focus Group participants.



People found the narrative "Mercenaries from more than 50 countries are fighting on the side of Ukraine" the most ambiguous and difficult to evaluate. In respondents' opinion, the word "mercenary" carries a negative meaning ("*He is an unprincipled killer,*" "*He kills for money,*" "*He doesn't care who for or where he fights*"). For respondents, the most acceptable term is "volunteer." In addition, respondents distrust this large number of countries, noting that this is a very large number and is probably untrue ("*Maybe 10-20 countries, but not 50*").



The narrative "The corrupt Ukrainian government wants to continue the war" is considered potentially true due to respondents' belief that the level of corruption in Ukraine is really very high.

The narrative "The war between Ukraine and Russia was provoked by the USA in order to realize its strategic interests" and "The Ukrainian authorities would like to negotiate with Russia, but the West forbids it" is perceived as something that could be true, because, some respondents said, the behavior of Ukraine depends on the USA, Ukraine depends on the supply of Western weapons, etc.



Respondents indicate that they would rather discuss the news with their friends than share it in social media, because they do not want to be a mouthpiece for Russian propaganda and disinformation.

(specificities of special population groups in focus group discussions and in-depth interviews)



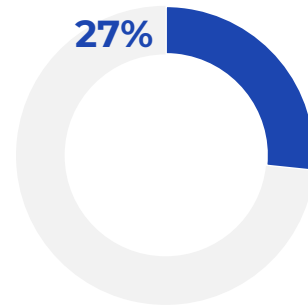
INTERNALLY DISPLACED PERSONS considered ambiguous but still false the narrative "Cities in Donbas are destroyed not by Russia, but by the Ukrainian army, which, when retreating, uses the tactics of *"scorched earth."* Respondents agree that Donbas is shelled by both parties and perceive it as a fact, but do not blame Ukraine for that.

Fact-Checking

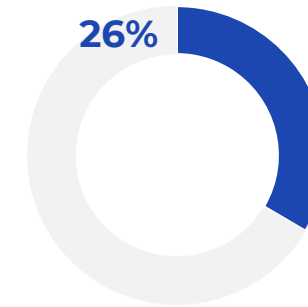
(verifying the accuracy and correctness of reports published by the media)

One in four respondents said they are aware of services that can be used to verify content. Around a third said they'd used fact-checkers and information resources like Stop Fake, Detector Media, Bez Brekhni, Po Toi Bik Novyn, Vox heck and Texty.org.

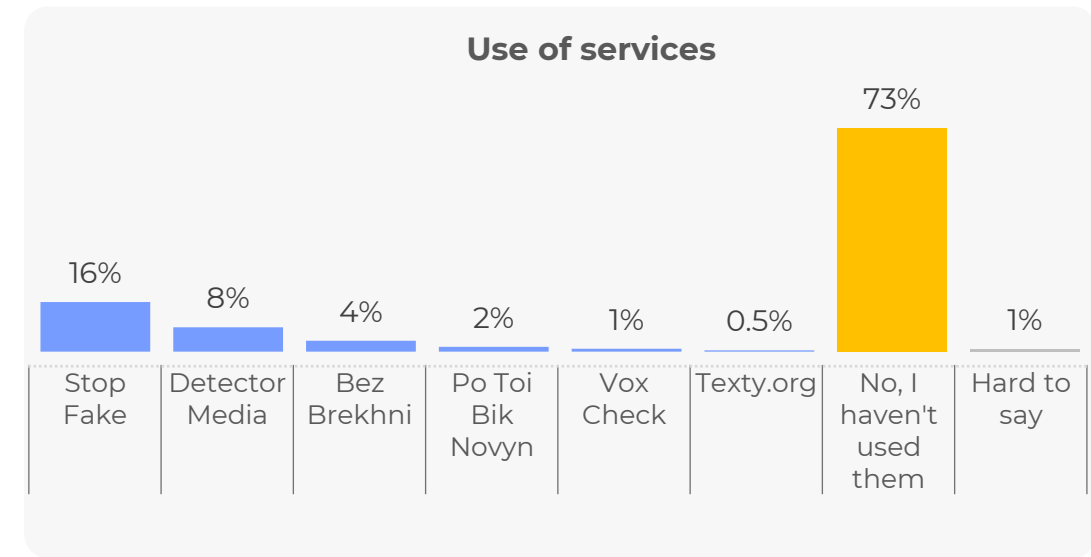
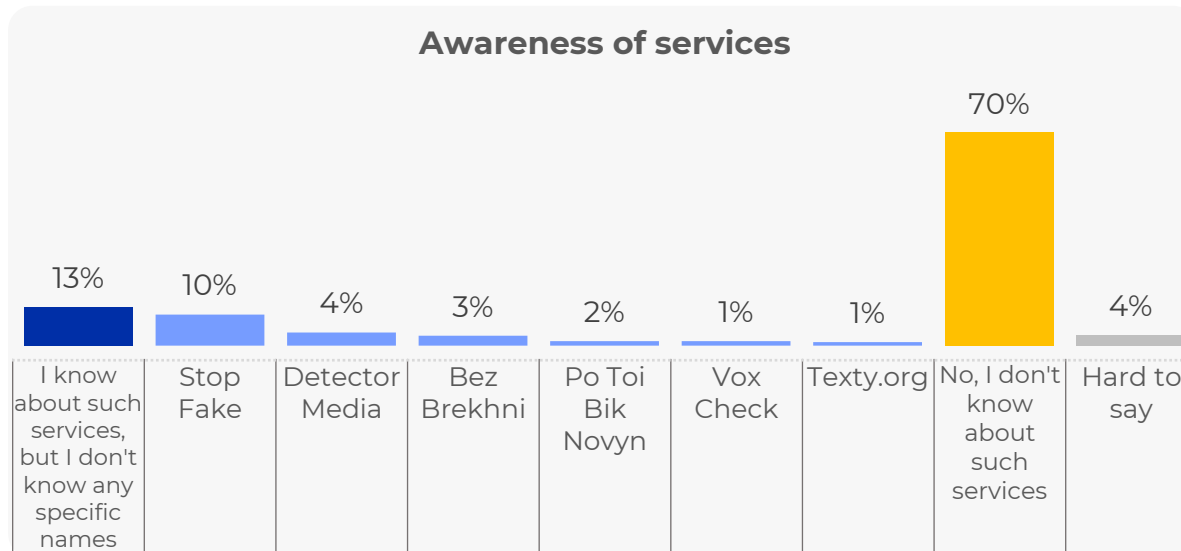
Awareness of services for verifying the accuracy and correctness of media content



Of those who know the specific services



Use of services for verifying the accuracy and correctness of media content



Question:

Are you aware of special services or platforms that can be used to verify the accuracy and correctness of doubtful reports in the media?
 Did you personally check any doubtful media reports with these services?

Base:

Total sample, N=1,456
 Those aware of the services and their names, N=203

(by focus groups results)



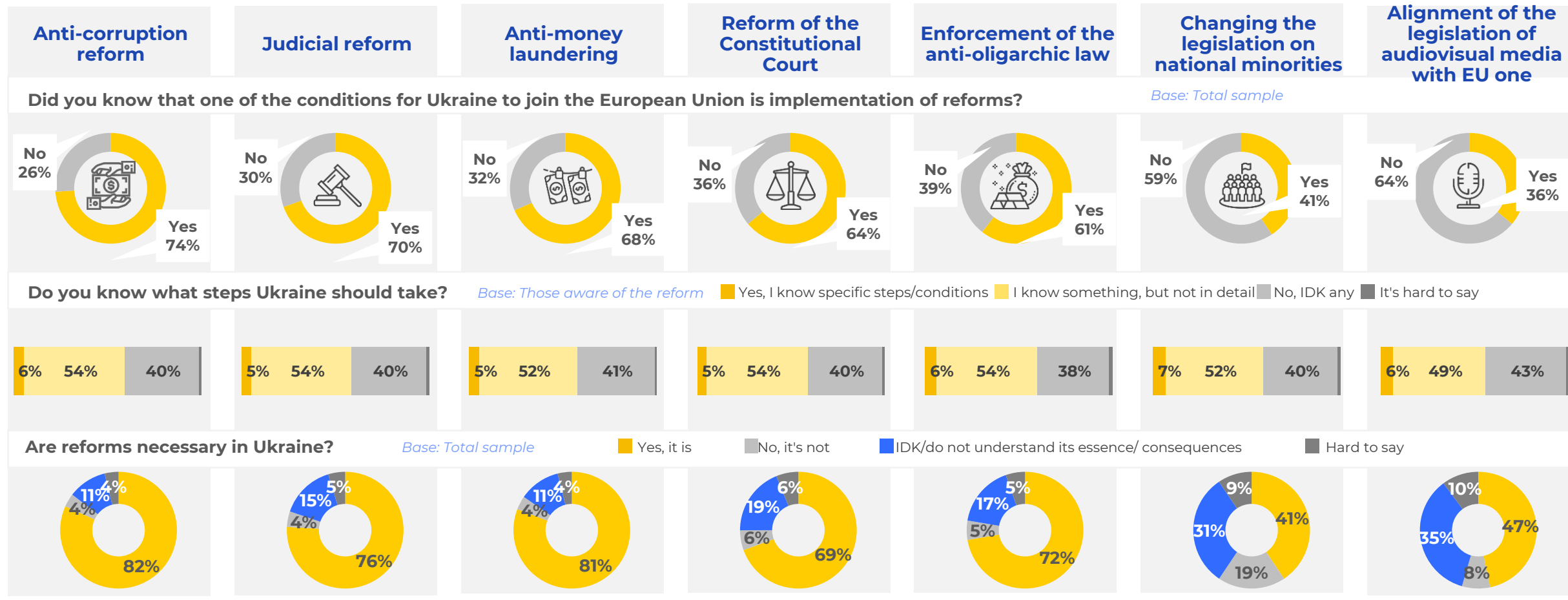
Respondents have heard about fact-checking, but they have not specifically used it. If Focus Group participants had experience, it was because they wanted to check how it worked.

In general, the attitude towards such content is positive, but respondents note that they got already used to checking disinformation by themselves, looking at various sources of information (*"I Google it myself and check whether it is true or false"*).

Among the listed resources, respondents most often mentioned StopFake and Detector Media, most others were almost unknown to Focus Group participants.

Reforms Required to Join the EU

79% of the respondents are aware of at least one reform that Ukraine has to implement under the EU Association Agreement. The reforms that the respondents heard the most about include anti-corruption reform, judicial reform, and anti-money laundering. The least known is the information on the need to harmonize audiovisual legislation with European law and to amend the law on national minorities.



Question:
 Did you know that one of the conditions for Ukraine to join the European Union is to implement the following reforms?
 Do you know what steps / conditions Ukraine should perform within the reform?
 In your personal opinion, are the following reforms necessary in Ukraine?

Base:
 Total sample, N=1,456
 Those aware of the reform, N=1078/1012/997/930/881/593/527

(by focus groups results)

Everyone is aware of Ukraine's application for EU membership. Respondents evaluate it positively, some skepticism is observed only in the age group of 46+.

Regarding the steps necessary for EU membership, the respondents know little and can only mention such steps as "judicial " and "anti-corruption" reform.



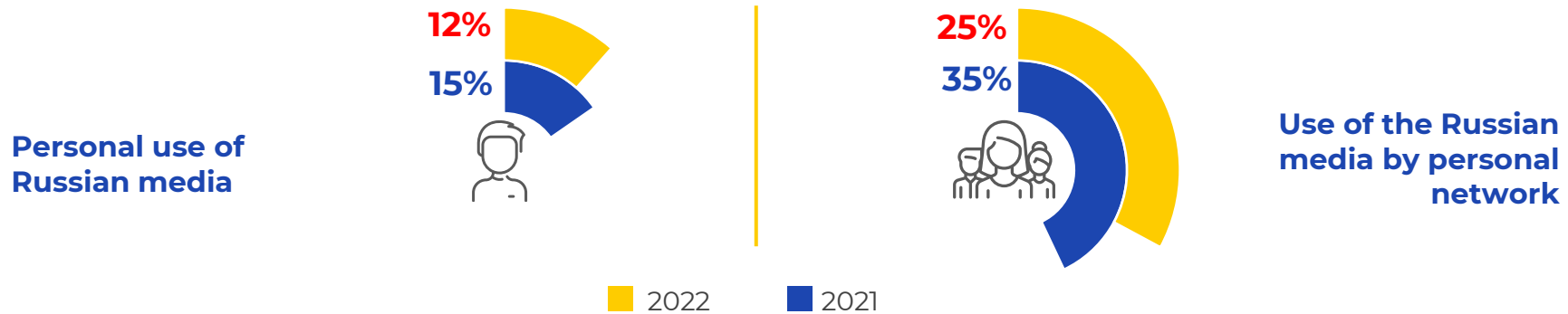
All steps on the way to EU membership are supported by respondents, although respondents themselves say that they know little about the essence of these steps. Respondents evaluate the reforms not from the point of view of how they will affect everyone, but rather as a necessary step for receiving membership in the European Union.

Respondents said the implementation of the anti-oligarch law is already taking place – the example they gave is that the oligarchs were deprived of their influence on TV channels.

Frequently respondents did not know about harmonization of audiovisual legislation with European legislation and did not understand what it is about.

Russian Media

There is a decrease in the personal consumption of Russian media – only 12% of respondents used Russian media in 2022, the share of Russian media consumers in the respondents' environment has decreased significantly too – down to 25%. The main reason for using Russian news media is to find out what they are saying about Ukraine.



Reasons for using Russian media

	To find out what the Russian media are saying about Ukraine	To get an alternative / different point of view	To get news from Russia – about what's happening in Russia	They are interesting, interesting to watch / read	Opportunity to get news in Russian	Truthful, more independent	Other	Hard to say
2022	35%	20%	13%	13%	4%	2%	15%	24%
2021	26%	25%	19%	19%	12%	4%	8%	22%
2020	29%	25%	28%	17%	15%	3%	3%	31%
2019		35%		22%	21%	4%	3%	36%

Question:

In the past 30 days, have you used any Russian media to receive news, including those that describe themselves as liberal and/or in opposition to the official Russian government?
 Are there people in your personal network who use Russian media to get news?
 Why do you think people use Russian media?

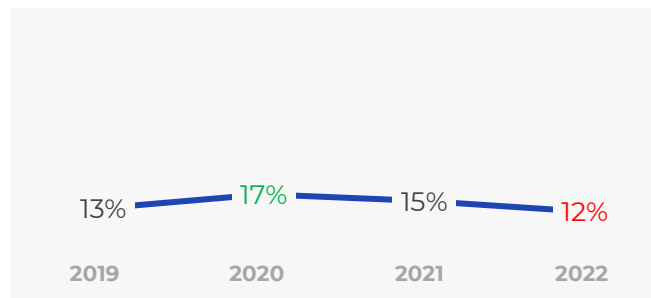
Base:

Total sample, 2019-2021, N~1,600/wave
 2022 N~1,450

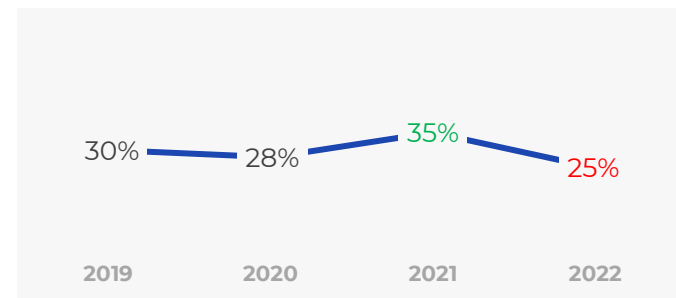
x / x - significantly more / less at 95% compared to the previous wave

Use of
the Russian
media

Personal use



Use by people in personal network



Question:

Have you used any Russian media for news within the past 30 days?
Are there people in your personal network who use Russian media to get news?

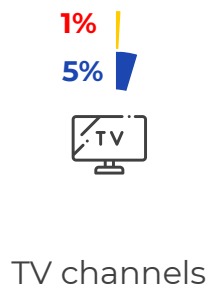
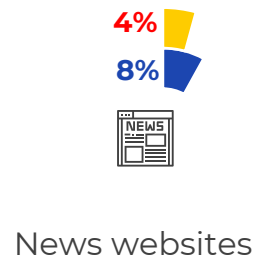
Base:

Total sample, 2019-2021, N~1,600/wave
2022 N~1,450

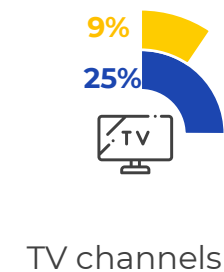
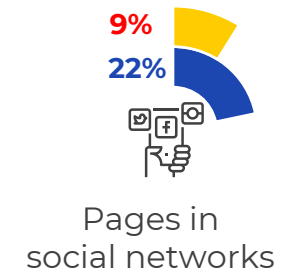
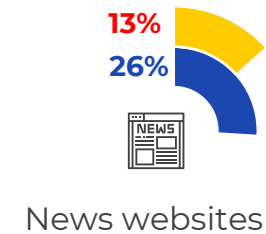
x / x - significantly more / less at 95% compared to the previous wave

Of the Russian media, Ukrainians tend to prefer social networks. Despite their use, the level of trust in the Russian media is low.

Consumption of the Russian media within the month



Level of trust in Russian media among their consumers



*Radio
insufficient database

■ 2022 ■ 2021

Question:

What kind of Russian media have you used to receive news in the past 30 days?

To what extent do you trust the news in...? % of those who trust

* Media are ranked by rating – from the media with the highest level to the media with the lowest level of consumption/trust

Base:

Use, entire sample, 2021 N~1,600

2022 N~1,450

Trust: those who use the type of media

2021, N = 127, 81, 74. 2022, N = 62, 103, 14

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

(by focus groups results)

Interest and trust in Russian media remains low after a steep decline that began after the Revolution of Dignity. News in the Russian media is perceived as propaganda directed against Ukraine. But sometimes they are consumed in order to compare how the Ukrainian and Russian media cover the same event, or just for fun (*"to laugh at what they say about us"*).

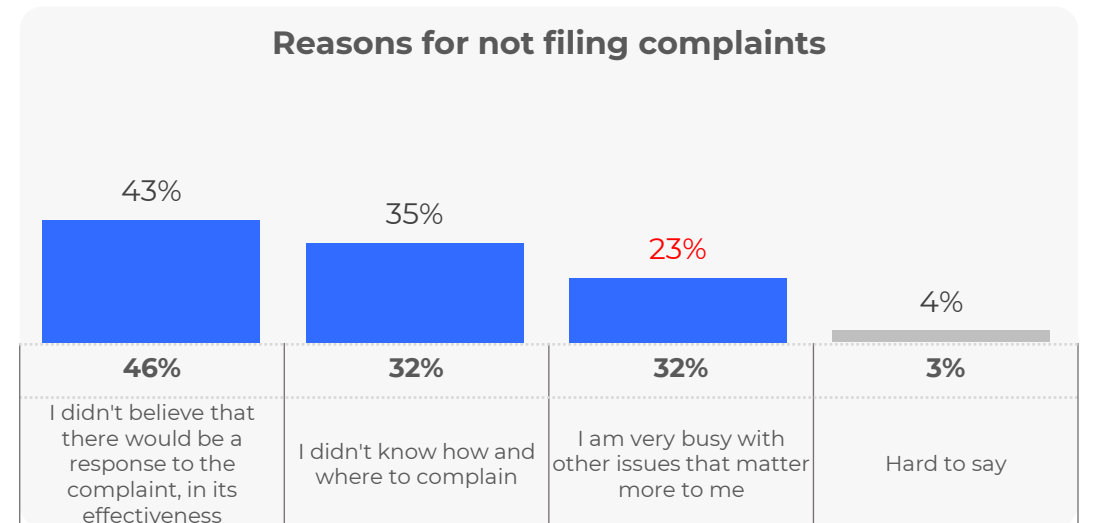
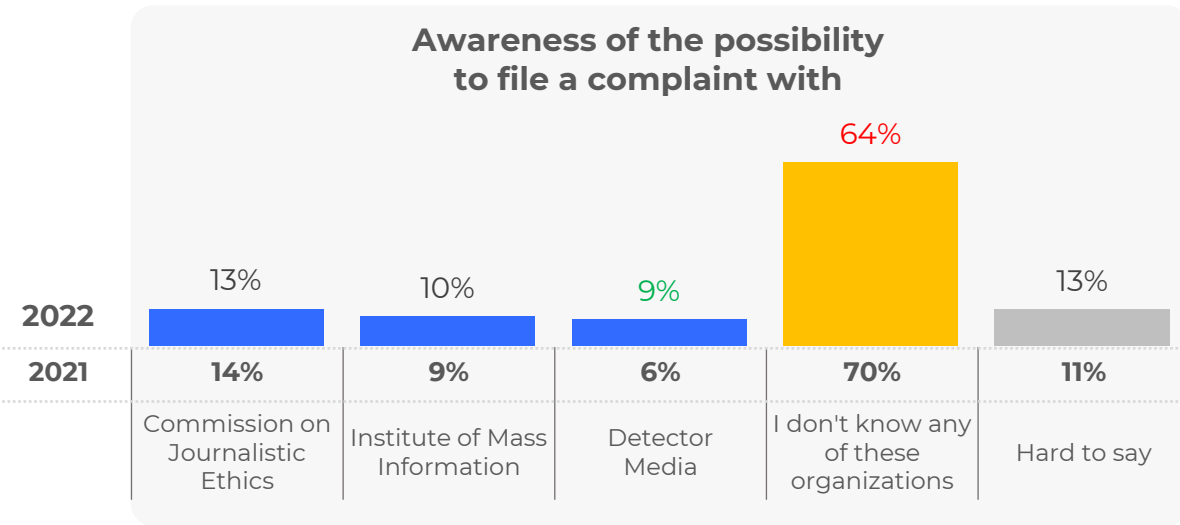
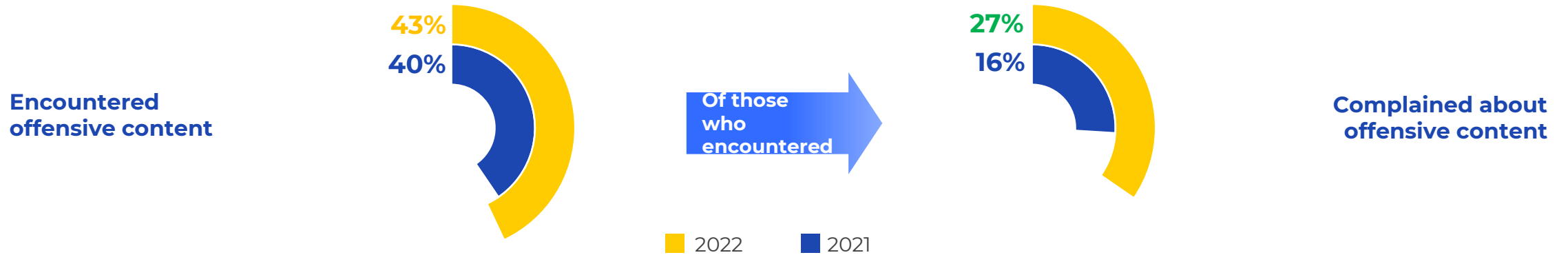


Respondents show little interest in “liberal” or “opposition” Russian media, believing that consumption of such media does not make much sense. Focus Group participants said “opposition Russian media” usually re-broadcast international media stories, but Ukrainian media are also re-broadcast international one, so there is no need to watch the same news twice.

Respondents most often name “opposition Russian media” with which they are familiar: Dozhd, Nastoyashcheye vremya (RFE/RL’s Current Time), Nevzorov, Feygin. More rarely – Meduza, Ponomariov, Kamikaze, Obmanytyi Rossianin.

Complaints about Media Content

About 40% of respondents encountered offensive content in the media and one in four said they had complained about content they found offensive. Those who did not complain mostly do not believe in the effectiveness of doing so or did not know how to. At the same time, the share of those who knew about the possibility of putting in a complaint to Detector Media and the Institute of Mass Information in 2022 has increased.



Question:

Have you ever come across content in the media that you think were so inaccurate or offensive that you wanted to complain about them? Have you complained about such content? Why not? Did you know that you can file a complaint about media content with the following public organizations?

Base:

Total sample, 2021, N~1,600, 2022, N~1,450
 Those aware, 2021, N=641, 2022, N=626
 Those who are aware but did not complain, 2021, N=529, 2022, N=451

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

(by focus groups results)



Respondents noted that they did sometimes complain about offensive content they encountered in the media. A small but growing minority know about the existence of specific institutions for complaints.



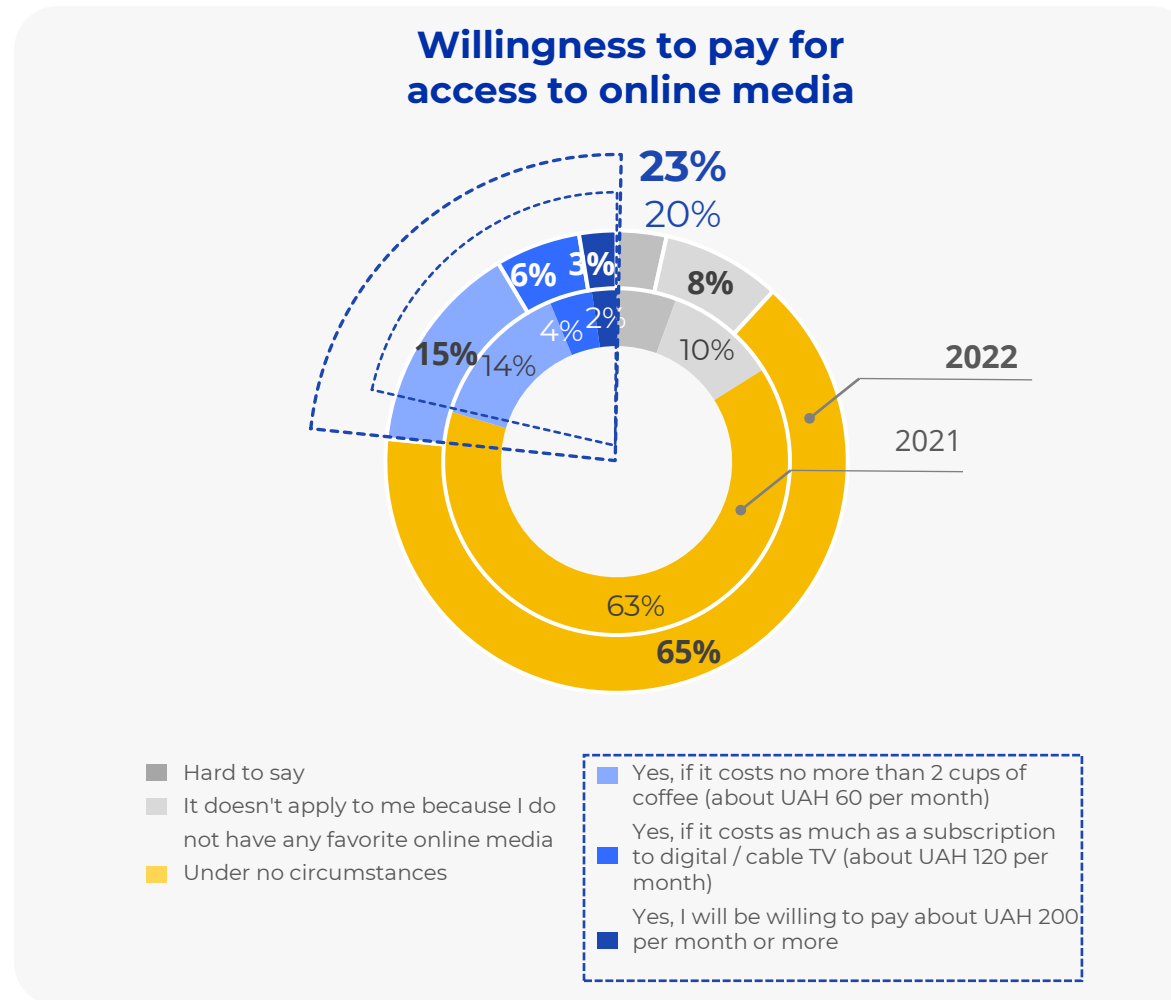
Respondents most often made their complaints only through social media, Facebook, Instagram, Telegram, YouTube, using the appropriate "Report" button. They mainly complained about false Russian news (*"They wrote that our prisoners of war were treated well, although it was not true", "I complained about Bezrukov on Instagram, he published a false post there," "I complained about Malakhov's post"*).

Respondents do not expect any reaction to their complaints, but it is rather a kind of protest against false or offensive content.



Willingness to Pay for Access to Online Media

23% of users of news websites are willing to pay for access to their favorite media, mostly provided that the cost of the service is no more than two cups of coffee (UAH 60) a month. The main reason not to pay for access is the existence of lots free information resources.



Question:

Would you consider paying for a subscription to access your favorite online news sites?

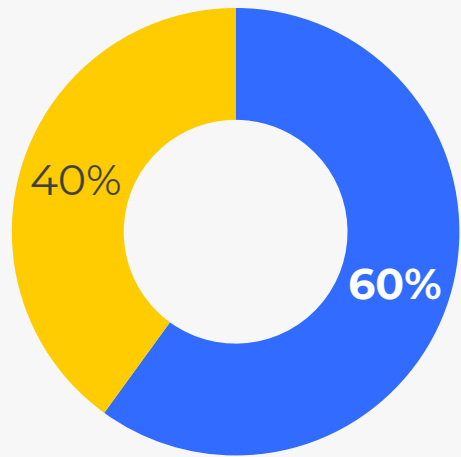
Base:

Users of news websites, 2021, N=753, 2022, N=613

Media Coverage of Equality-Related Topics

60% of the respondents are aware of the ratification of the Council of Europe Convention on the Prevention of Violence against Women and Domestic Violence (Istanbul Convention) by Ukraine. Of those who are aware of the ratification, 63% know of the changes that this document introduces, but in general, without specific steps / details.

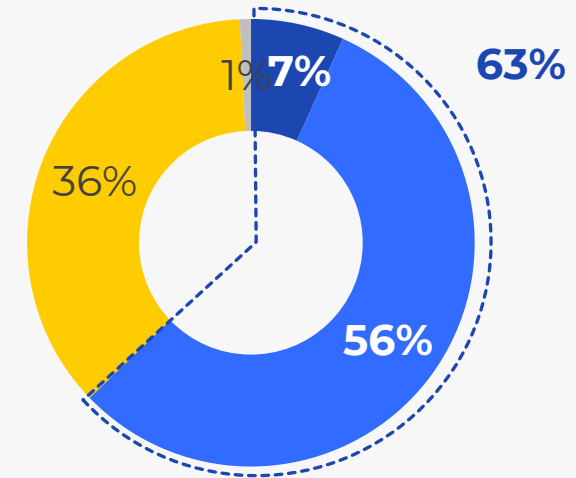
Awareness of the ratification of the Istanbul Convention



■ Aware ■ Not aware

Of those who are aware

Awareness of the changes introduced by the Istanbul Convention



■ Hard to say
■ No, I do not know anything about it

■ Yes, I know something, but without details
■ Yes, I know the specific changes/steps

Top2Box

Question:

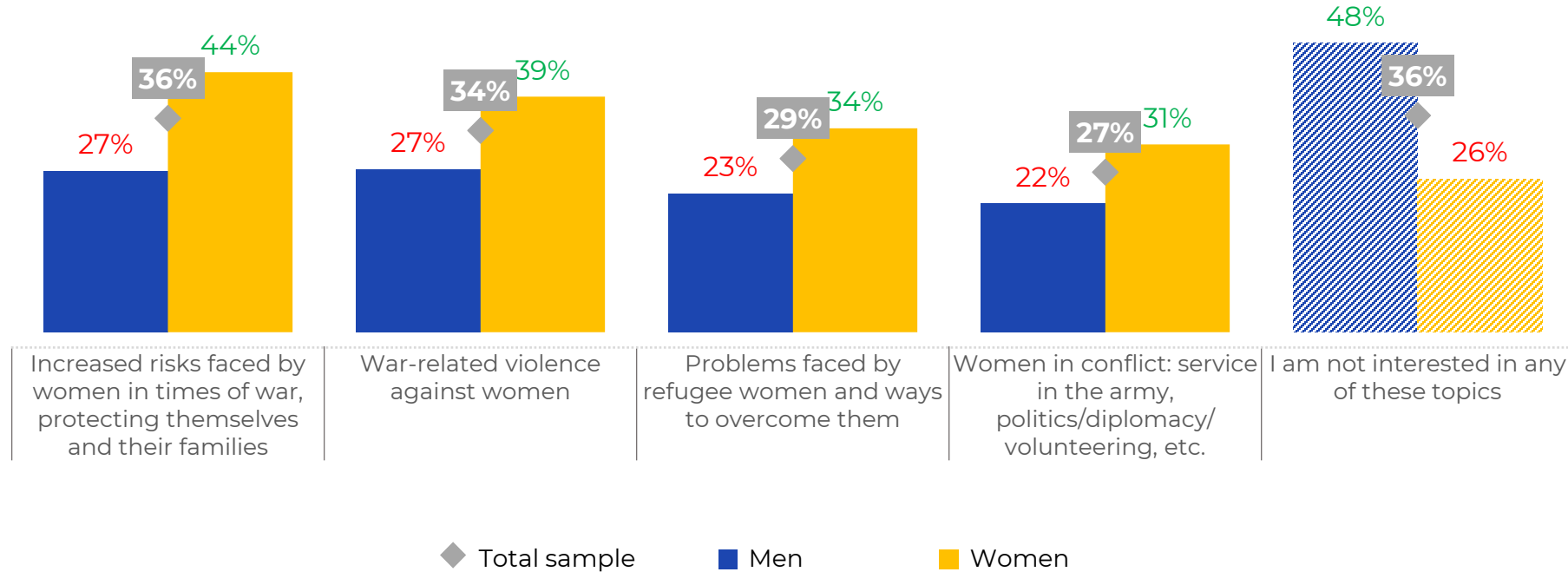
Did you know that Ukraine has ratified the Council of Europe Convention on the Prevention of Violence against Women and Domestic Violence (Istanbul Convention)?
Do you know what changes/ steps are introduced by the Istanbul Convention?

Base:

Total sample, N=1,456
Those aware, N=873

Almost one in three respondents have a demand for coverage of topics related to women's concerns during the war regarding the protection of themselves and their families and violence against women related to the war. Women are significantly more interested in information on all proposed topics than men.

Topics related to gender equality, that respondents would like to be better covered



Question:

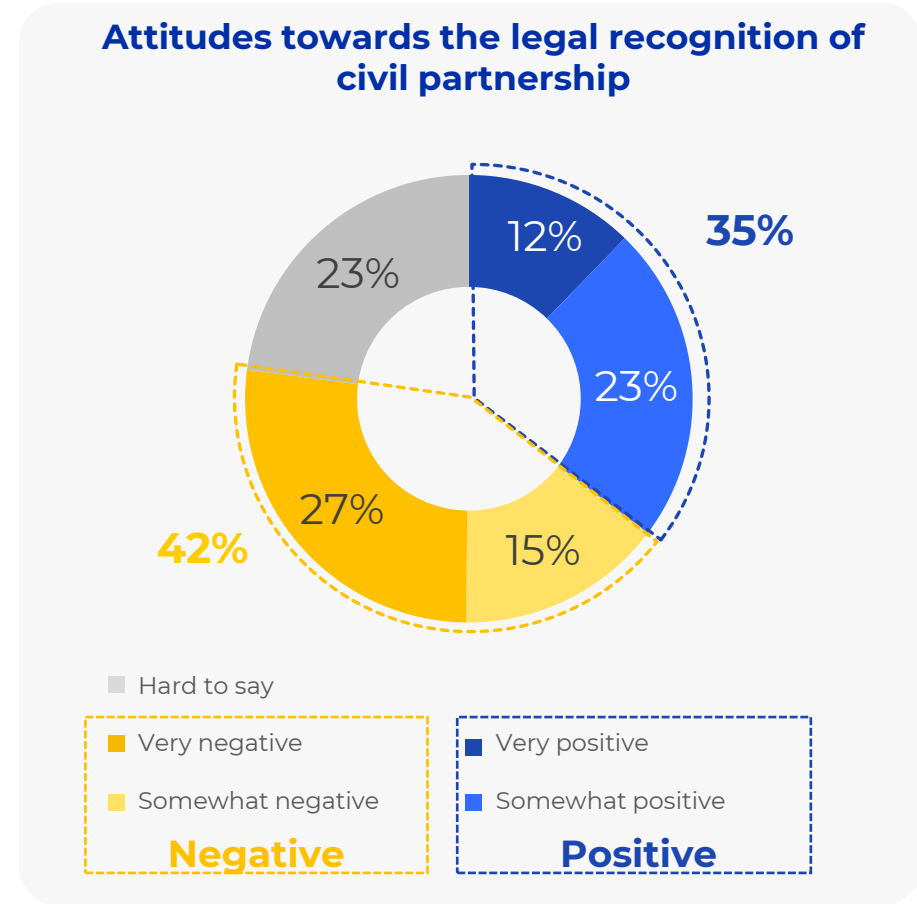
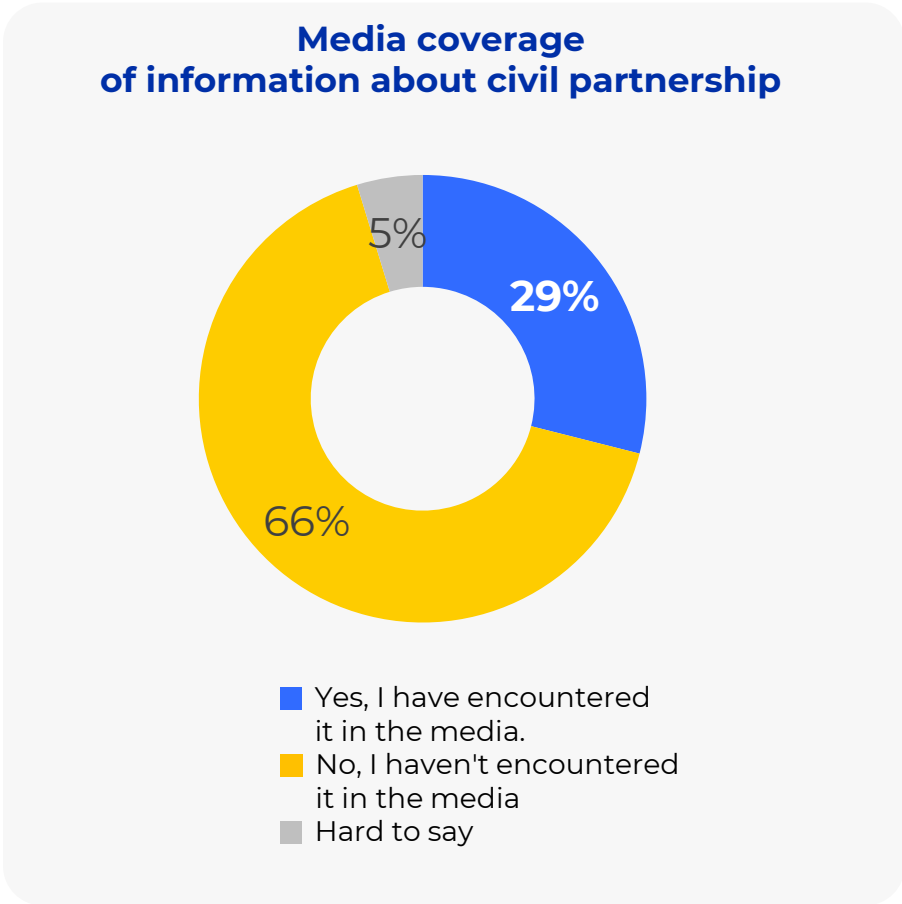
Select the most important topics related to gender equality on which you would like to receive more coverage in the near future?

Base:

Total sample, N=1,456, men, N= 680, women, N= 776

x /x – Significantly more/less at 95% compared to the total sample

About a third of the respondents encountered information about civil partnerships in the media. Opinions on the legal recognition of such an institution were mixed – 42% have a negative attitude, while 35% have a positive attitude.



Question:
Civil partnership is a legally recognized union between same-sex or different-sex couples that grants them the right to joint ownership, inheriting property, the right to alimony and benefits, and the right to visit their partner in medical institutions.
 Have you encountered any information about civil partnerships in the media, in particular regarding same-sex couples?

Question:
 What is your opinion of the legal recognition of civil partnership?

Base:
 Total sample, N=1,456 **76**

(by focus groups results)



Respondents have heard about the Istanbul Convention and have a positive attitude towards it. They say information about domestic violence against women has decreased in national media because news about the war has supplanted this information. At the same time in regional media problem is covered well as before.



In respondents' opinion, information about women in the army appears in the media quite often. It is frequently noted how women are tank commanders, snipers, paramedics, etc. Respondents are positive about mentioning women during the President's speech, or congratulating male and female defenders separately.

At the same time respondents often mention the lack of equal pay for women and men, the division of professions into male and female.



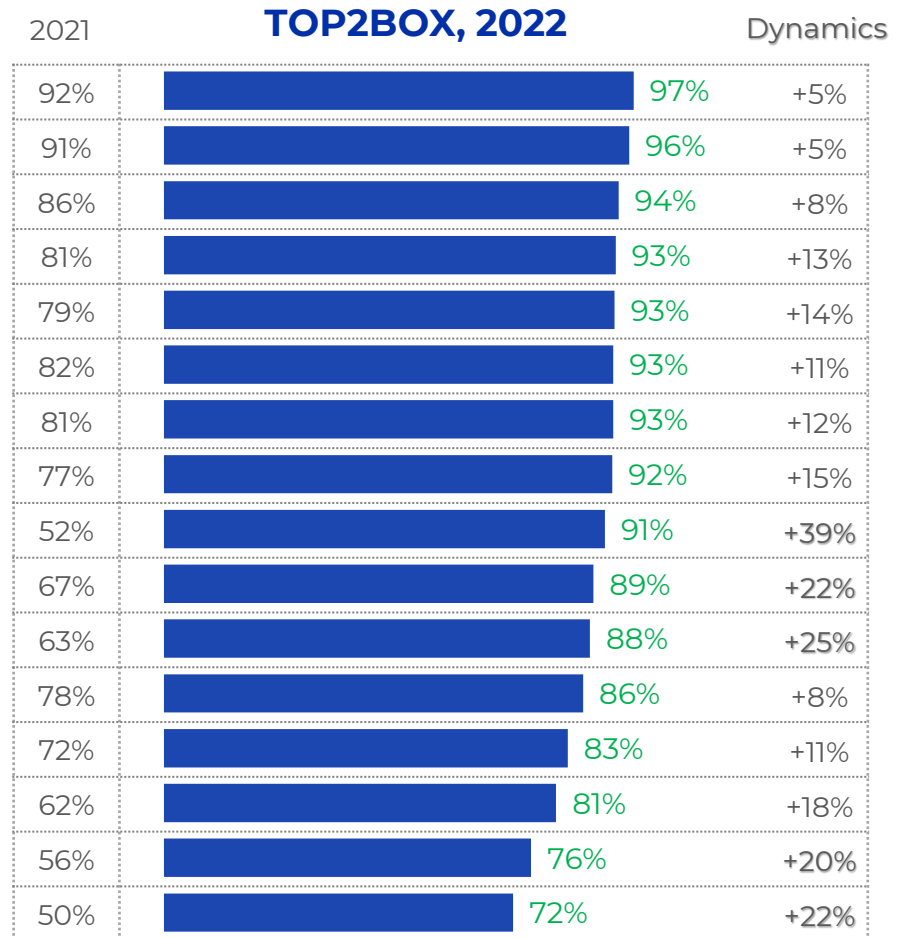
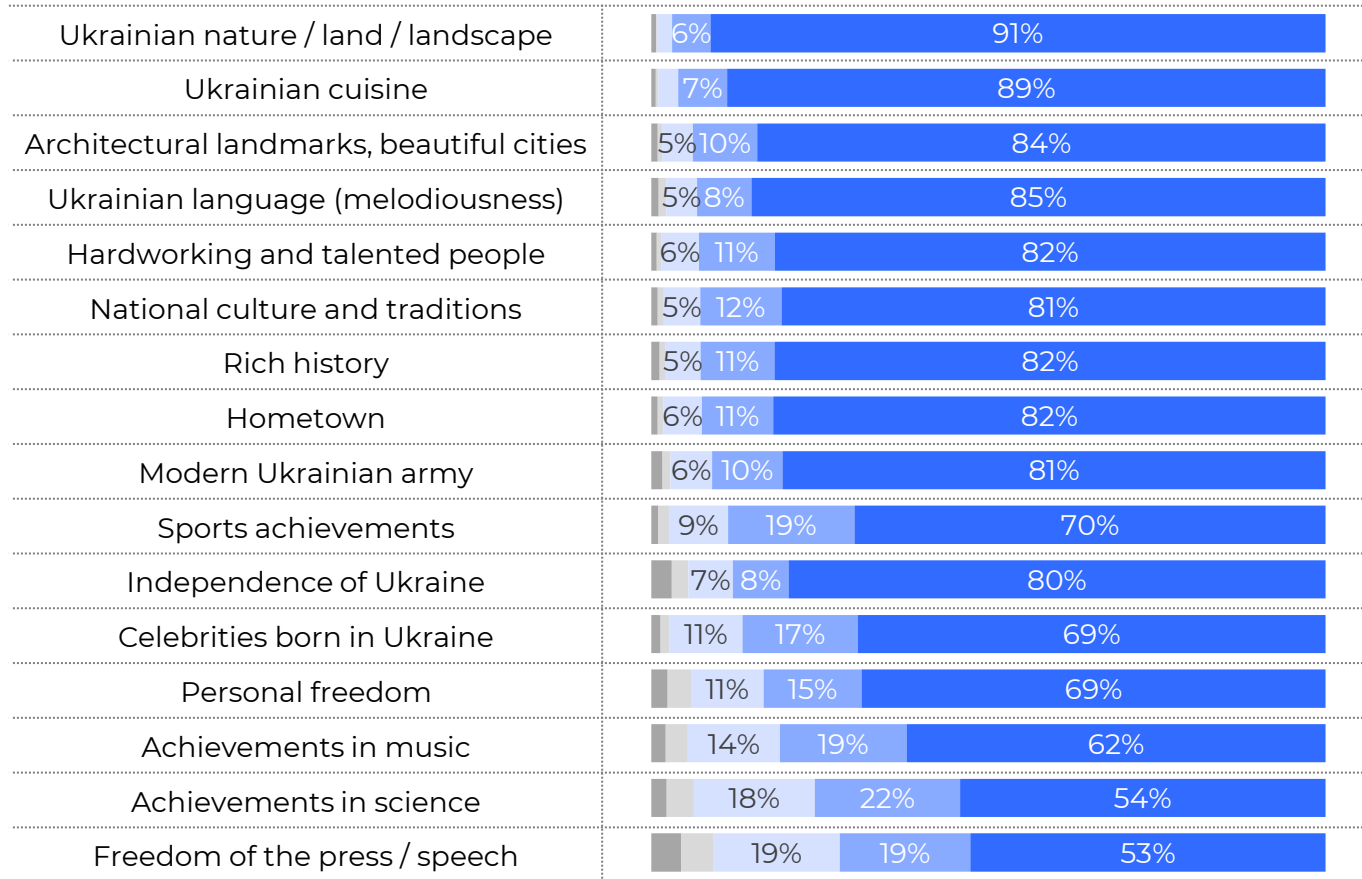
Respondents say they have seen news about discussions about civil partnerships, mainly mentioning the petition in support of same-sex marriage on the website of the Office of the President of Ukraine. In general, respondents did not express much resistance to civil partnerships, mainly associating it with the fact that the country needs this institution for its further European integration.

Regarding civil partnerships for the LGBT community, the respondents' opinions were either neutral ("*I don't care what happens behind my neighbor's wall*") or moderately positive ("*These people are the same as us and have the right to have the same rights*"). Young respondents (aged 18-30) spoke most favorably about LGBT rights.

Pride in Ukraine

Compared to the previous year, the level of pride has significantly increased across all the criteria assessed, the greatest increase is observed with regard to the modern Ukrainian army and the independence of Ukraine. In general, Ukrainians are especially proud of their nature and land, cuisine, architecture, language, Ukrainian nation, culture and traditions, and history.

Pride in Ukraine, 2022



■ 1-Not proud at all ■ 2 ■ 3 ■ 4 ■ 5 - Very proud **Top2Box**

Question:
 What are you personally most proud of when you think of Ukraine?

Base:
 Total sample, 2021, N~1,600, 2022, N~1,450

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

Annex 1

Methodology of Research

QUANTITATIVE STAGE

Baseline and interpretive focus group discussions

Target Audience

Men / Women 18-65

Fieldwork dates

25.07.2022 – 30.07.2022,
21.09.2022-24.09.2022

Geography

Ukraine, cities of 50 K+,
Kyiv (2 FGDs)
Lviv (2 FGDs)
Odesa (2 FGDs)
Dnipro (1 FGD)
Poltava (1 FGD)
Chernihiv (1 FGD)
Zhytomyr (1 FGD)

Focus group discussions with rural inhabitants

Target Audience

Men / Women 30-60

Fieldwork dates

28.08.2022 – 29.08.2022,

Geography

villages,
Poltava Oblast, Stasi
(1 FGD),
Lviv Oblast, Ushkovichi
(1 FGD)

Focus group discussions with Internally Displaced Persons

Target Audience

Men / Women 20-60

Fieldwork dates

25.08.2022 – 03.09.2022

Geography

Ukraine, cities,
Korsun-Shevchenkivskiy
(1 FGD)
Khmelnitskiy (1 FGD)
Poltava (1 FGD)

In-depth interviews with inhabitants of temporarily occupied, blocked territories and/or where there are hostilities

Target Audience

Men / Women 20-60

Fieldwork dates

18.08.2022 – 07.09.2022

Geography

Kupyansk (2 interviews)
Balakliya (1 interview)
Starobilsk (2 interviews)
Bilokurakhyne (1 interview)
Mariupol (2 interviews)
Bakhmut (1 interview)
Berdyansk (2 interviews)
Melitopol (1 interview)
Kherson (2 interviews)
Chornobayivka (1 interview)

QUALITATIVE STAGE

Face-to-face method:

Target Audience

Men / Women 18-65

Fieldwork dates

08.08.2022 – 04.09.2022

Geography

Ukraine, cities of 50 K+,

The survey was conducted in the Kyiv, Vinnytsia, Volyn, Dnipropetrovsk, Zhytomyr, Zakarpattia, Ivano-Frankivsk, Kyiv, Kirovohrad, Lviv, Mykolaiv, Odesa, Poltava, Rivne, Sumy, Ternopil, Kharkiv, Khmelnytskyi, Cherkasy, Chernihiv, and Chernivtsi regions (as for the Mykolaiv and Kharkiv regions, it covered only the territories controlled by the Government of Ukraine where there are no hostilities).

Persons who have gone abroad did not participate in the survey.

Total sample 2022 = 3,250 interviews,

of which ~ 300 interviews in 8 regions:
Kyiv region (including Kyiv), Vinnytsia, Dnipropetrovsk, Lviv, Odesa, Poltava, Sumy, and Kharkiv regions.

Representative part 2022 = 1,456 interviews.

To ensure that the sample is representative, we have developed special statistical weights that brought the structure of the datasets in line with the data of the State Statistics Service with regard to such parameters as region, type of settlement, sex, and age as of the beginning of 2022. The sampling error does not exceed 2.5% with a probability of 0.95.

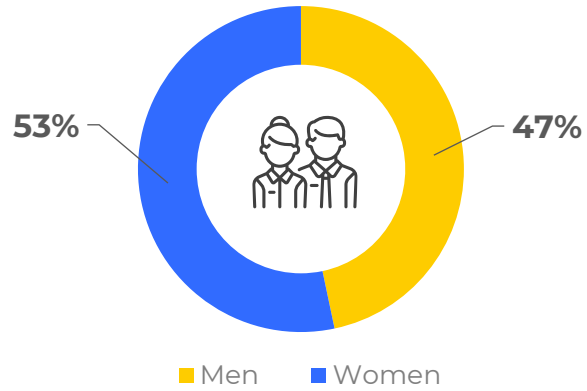
Region (oblast)/ macroregion	2015	2016	2017	2018	2019	2020	2021	2022	Share
Total sample	1643	1638	1650	1643	1618	1582	1583	1456	100%
West	276	275	277	276	256	267	267	298	20%
Volyn Oblast	32	31	32	32	32	30	30	34	2%
Zakarpattia Oblast	19	19	19	19	-	18	18	20	1%
Ivano-Frankivsk Oblast	33	33	34	33	33	33	33	37	2%
Lviv Oblast	89	89	89	89	88	86	86	95	6%
Rivne Oblast	24	24	24	24	24	22	22	25	2%
Ternopil Oblast	21	21	21	21	20	20	20	22	2%
Khmelnyskyi Oblast	35	35	35	35	35	34	34	38	3%
Chernivtsi Oblast	24	24	24	24	24	24	24	27	2%
North	428	424	431	428	426	417	417	465	32%
Kyiv and Kyiv Oblast	301	301	302	301	300	300	300	335	23%
Zhytomyr Oblast	45	45	45	45	45	41	41	46	3%
Sumy Oblast	41	41	42	41	41	39	39	43	3%
Chernihiv Oblast	41	37	42	41	40	37	37	41	3%

Region (oblast)/ macroregion	2015	2016	2017	2018	2019	2020	2021	2022	Share
Center	162	162	162	162	161	154	154	172	12%
Vinnitsia Oblast	35	35	35	35	35	33	33	37	3%
Kirovohrad Oblast	30	30	30	30	30	32	32	36	2%
Poltava Oblast	54	54	55	54	54	50	50	56	4%
Cherkasy Oblast	42	42	42	42	42	39	39	43	3%
South	299	299	300	299	298	277	278	165	11%
Zaporizhzhia Oblast	104	104	105	104	104	93	93	-	-
Mykolaiv Oblast	53	53	54	53	53	49	49	48	3%
Odesa Oblast	113	113	113	113	112	105	105	117	8%
Kherson Oblast	28	28	29	28	28	31	31	-	-
East	479	479	480	479	477	468	467	356	24%
Dnipropetrovsk Oblast	209	209	209	209	208	187	187	209	14%
Donetsk Oblast	97	97	98	97	97	113	113	-	-
Luhansk Oblast	26	26	26	26	26	25	25	-	-
Kharkiv Oblast	147	147	147	147	146	142	142	147	10%

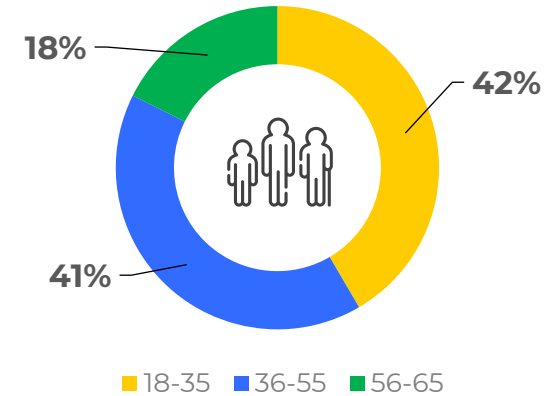
Annex 2

Sociodemographic Profile

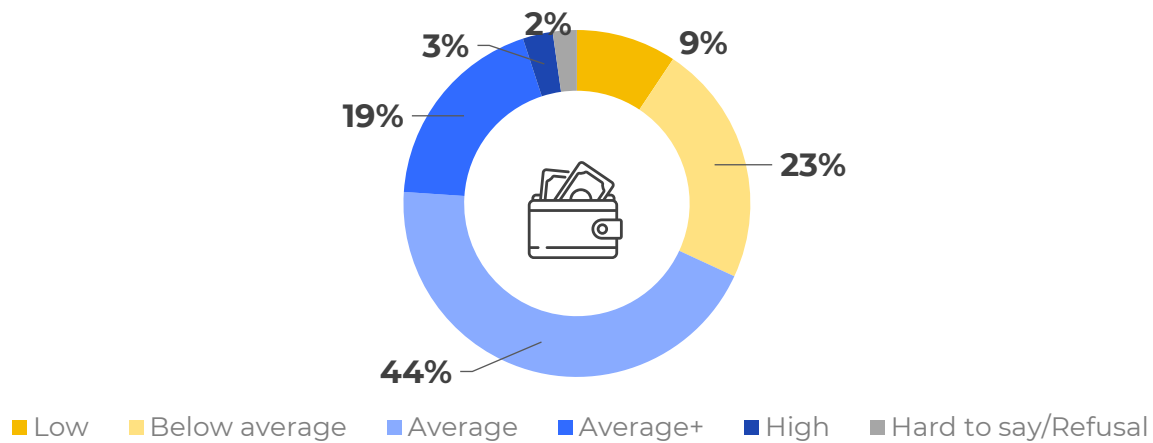
Gender



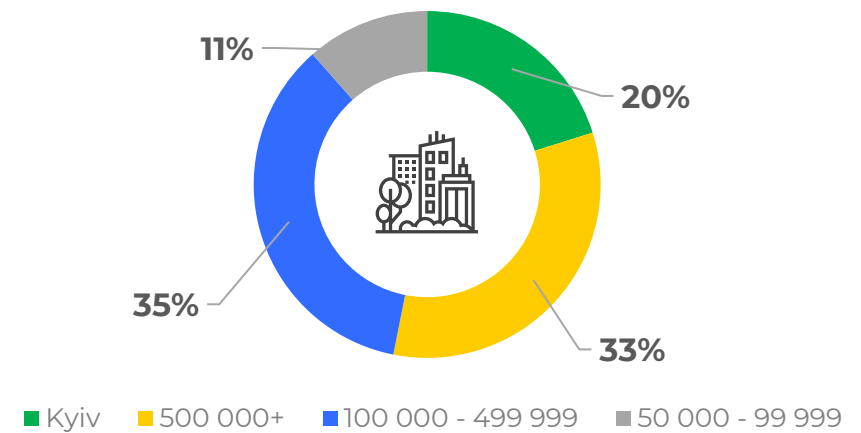
Age



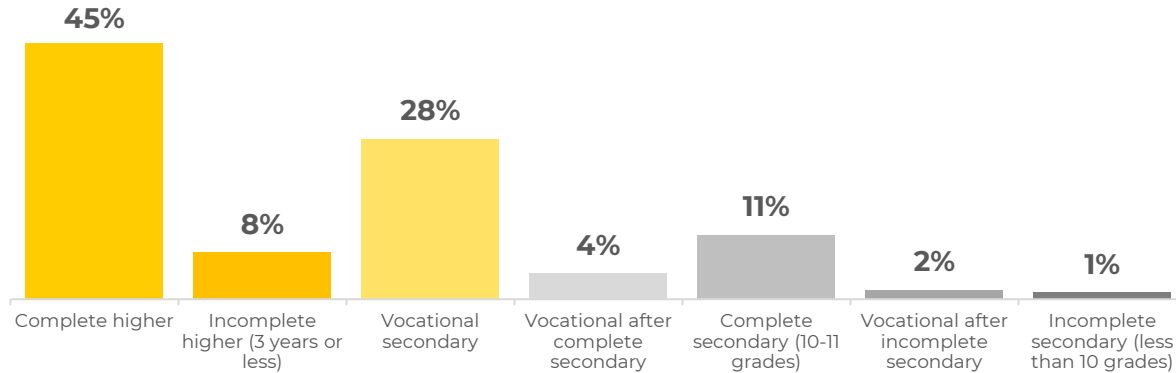
Income levels*



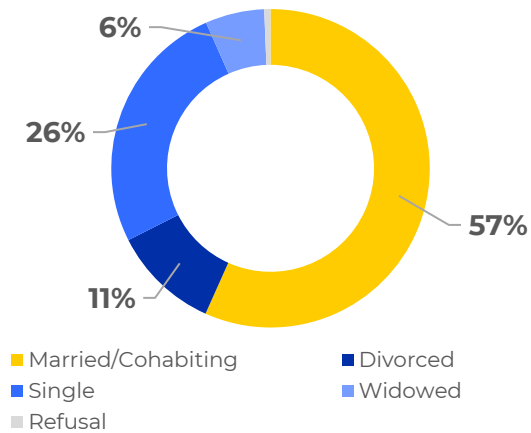
Type of settlement



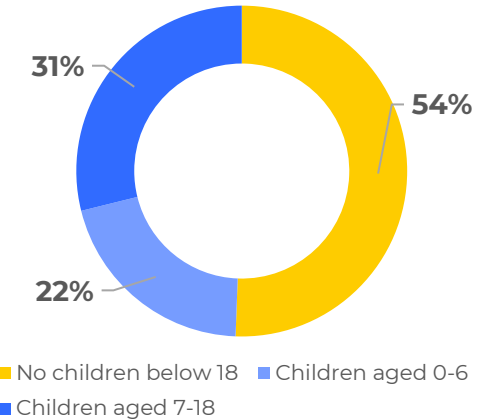
Education



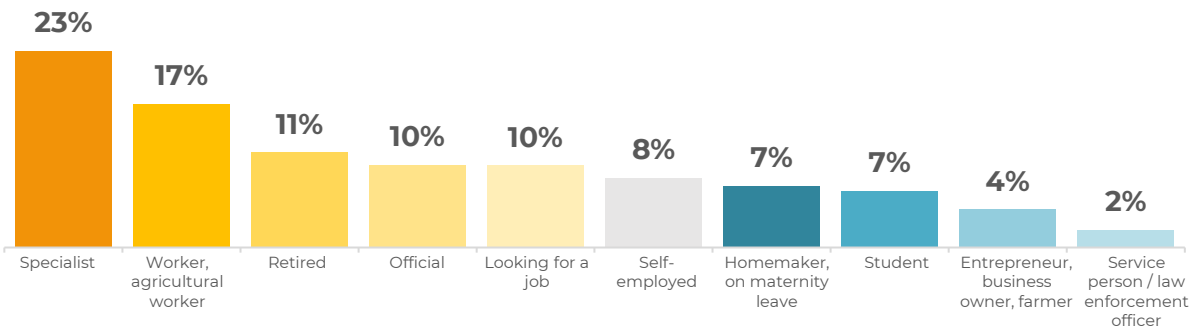
Marital status



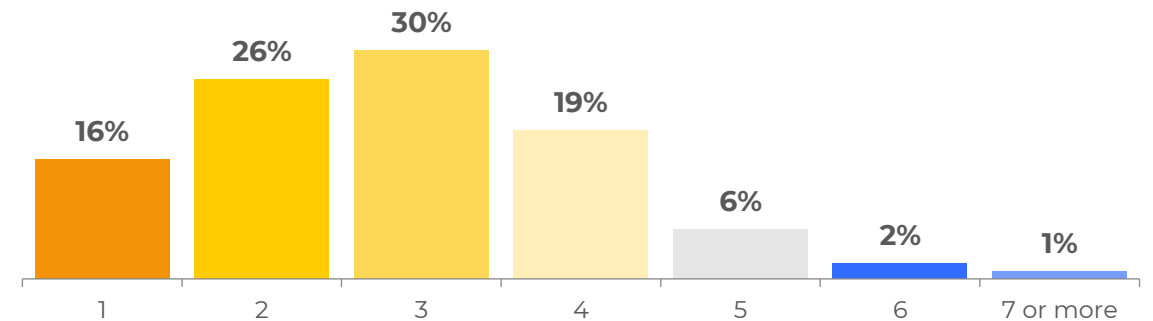
Children



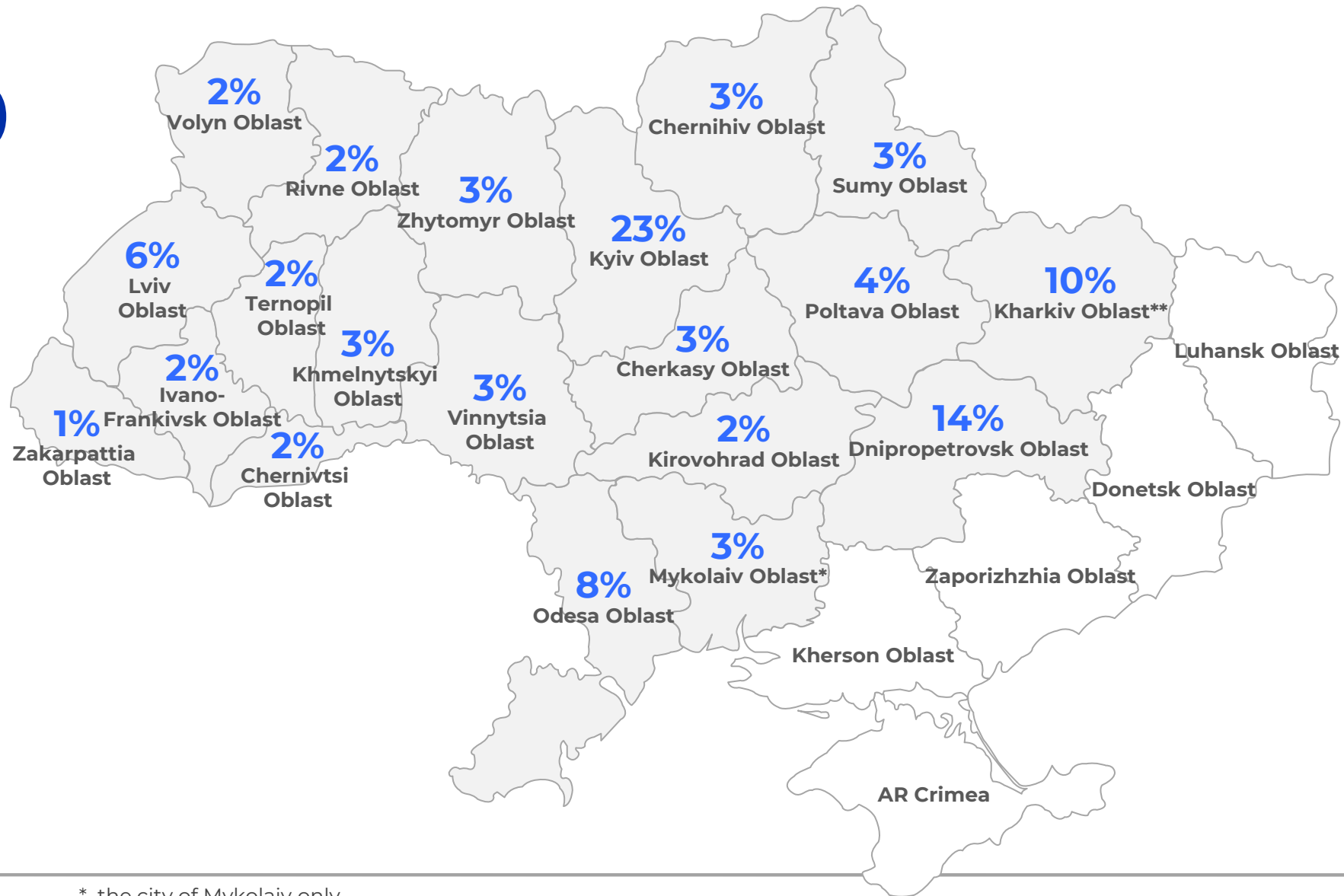
Employment*



Household size



Oblasts (Regions)



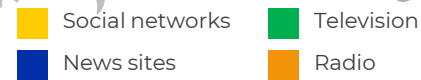
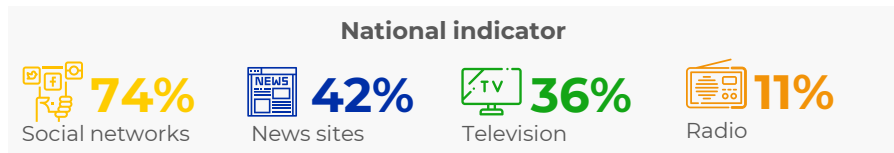
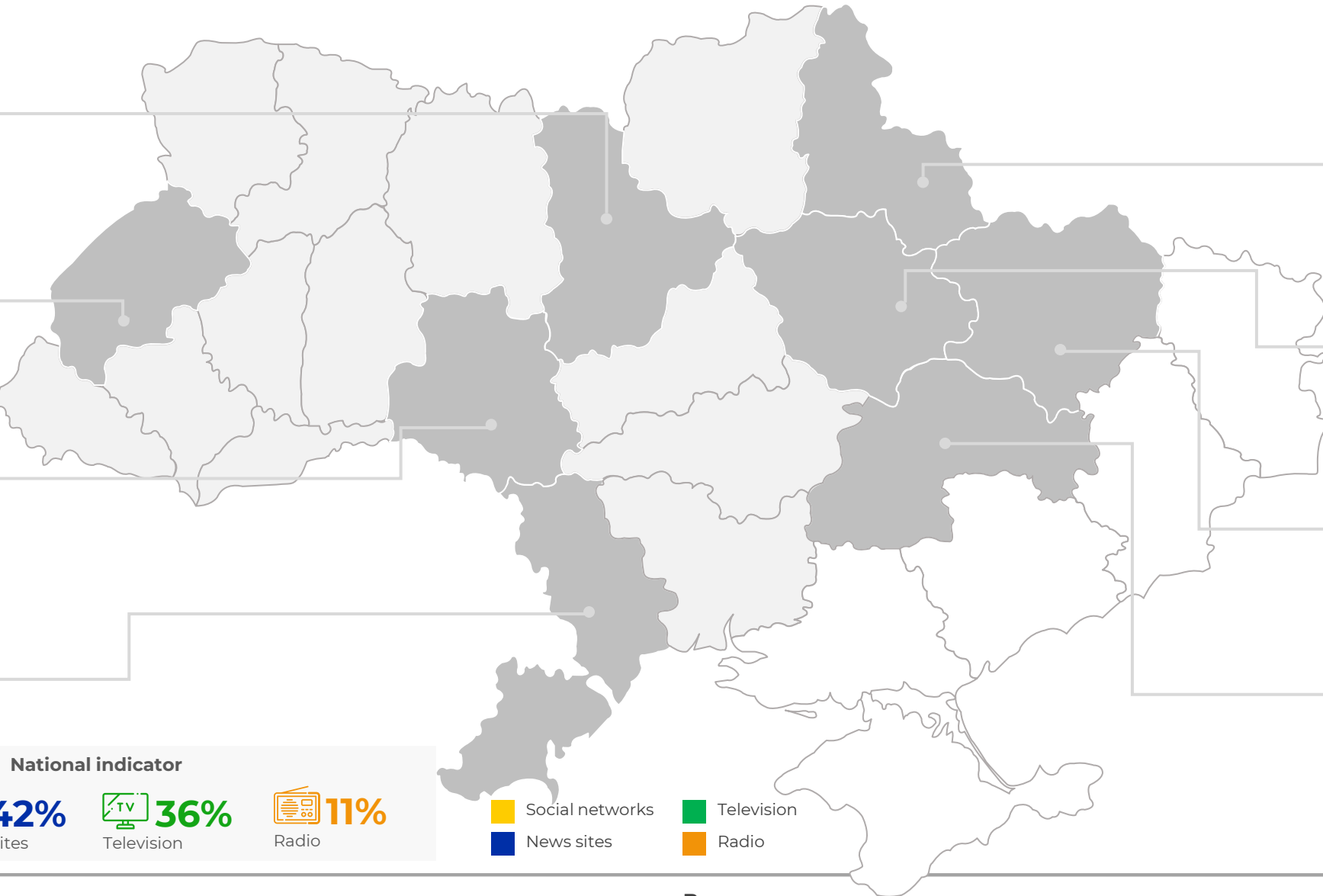
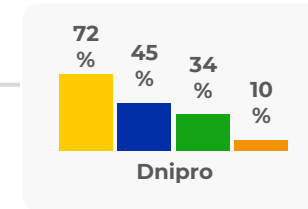
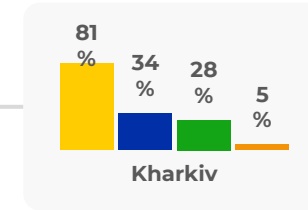
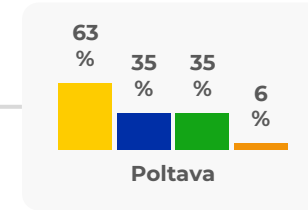
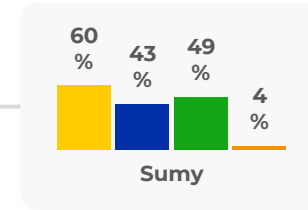
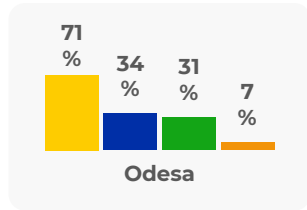
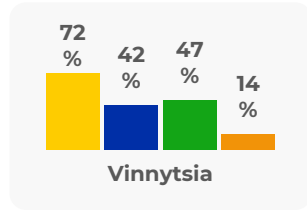
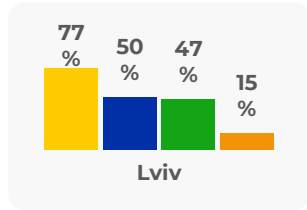
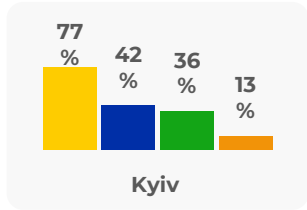
Base:
 Total sample, N=1,456

* the city of Mykolaiv only
 ** the city of Kharkiv only

Annex 3

Regional Indicators

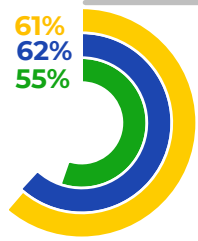
Media activity by regions. 2022



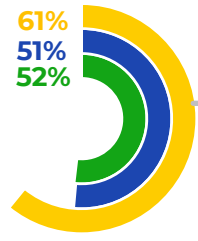
Question:
Please tell us what media you have used within the past 30 days to get news?

Base:
Every oblast, N=300

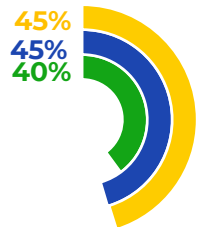
Split by macroregions



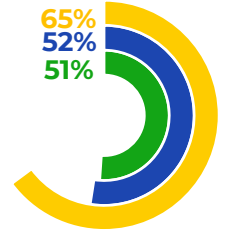
WEST



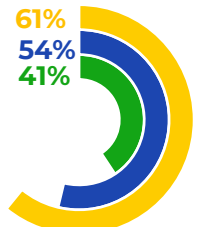
CENTER



SOUTH



NORTH



EAST

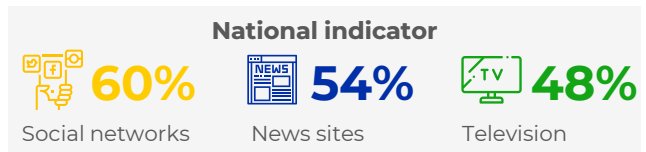
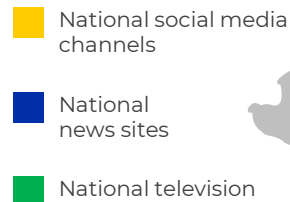
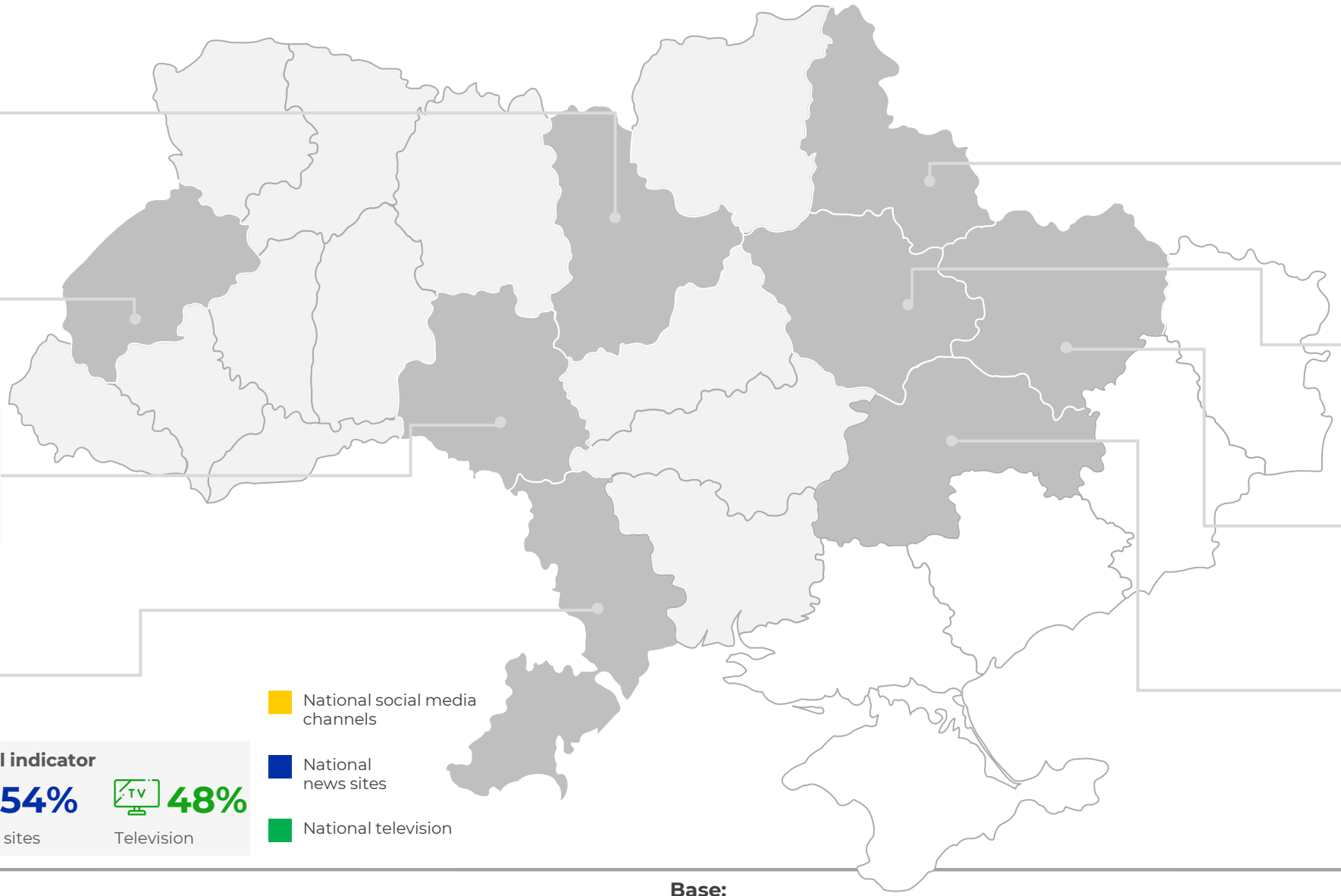
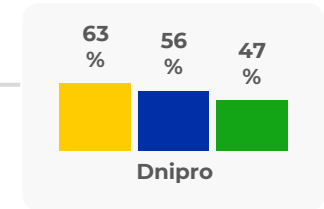
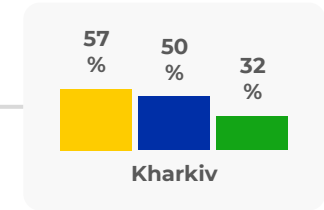
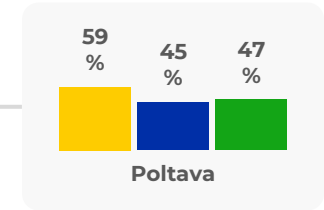
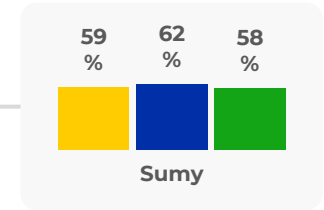
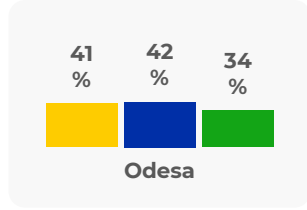
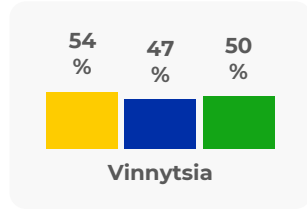
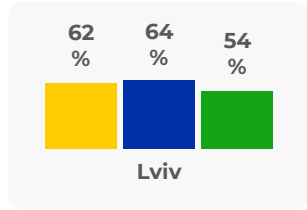
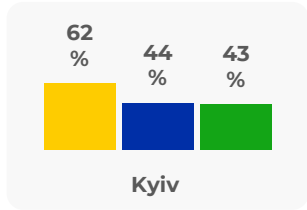
National indicator



- National social media channels
- National news sites
- National television

Question:
To what extent do you trust the news in national...?
% of those who trust completely or in part

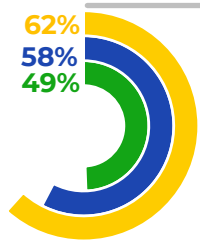
Base:
West N= 298 Center N= 172
East N= 356 North N= 465
South N= 165



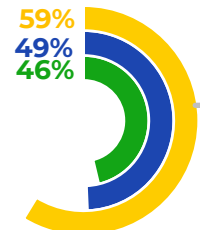
Question:
To what extent do you trust the news in national...?
% of those who trust completely or in part

Base:
Every oblast, N=300

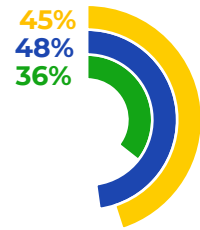
Split by macroregions



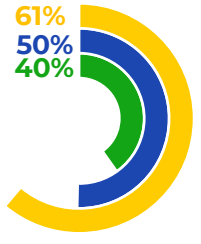
WEST



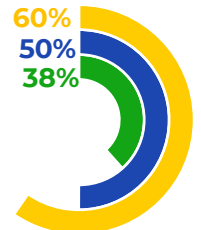
CENTER



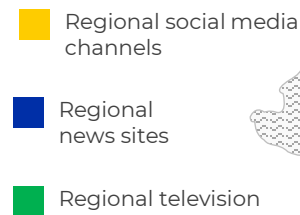
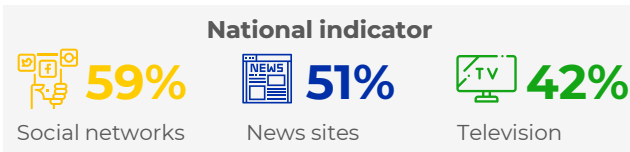
SOUTH



NORTH

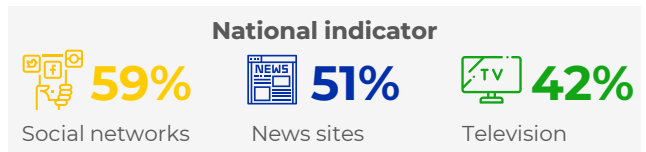
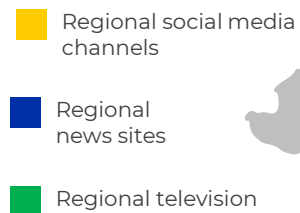
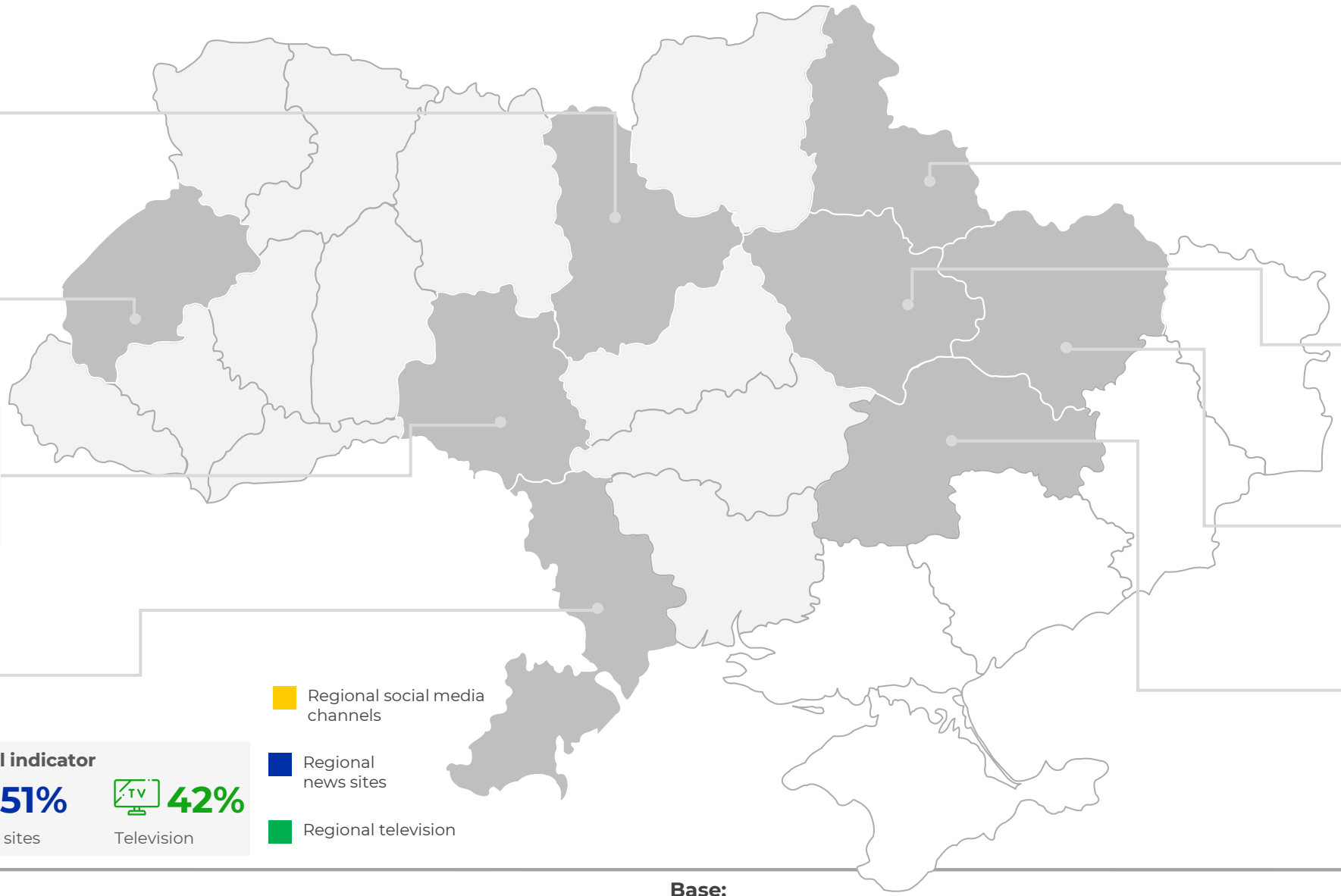
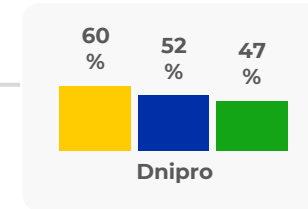
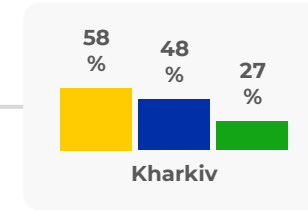
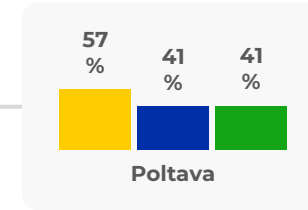
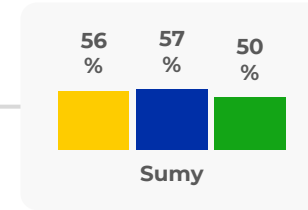
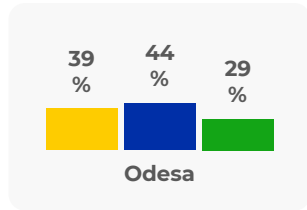
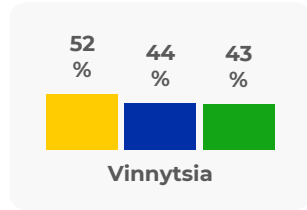
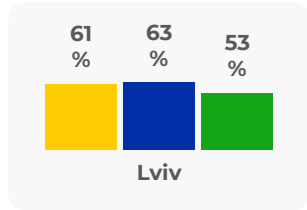
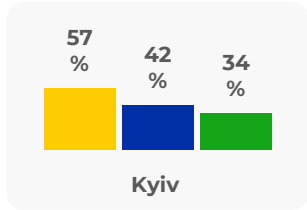


EAST



Question:
To what extent do you trust the news in regional...?
% of those who trust completely or in part

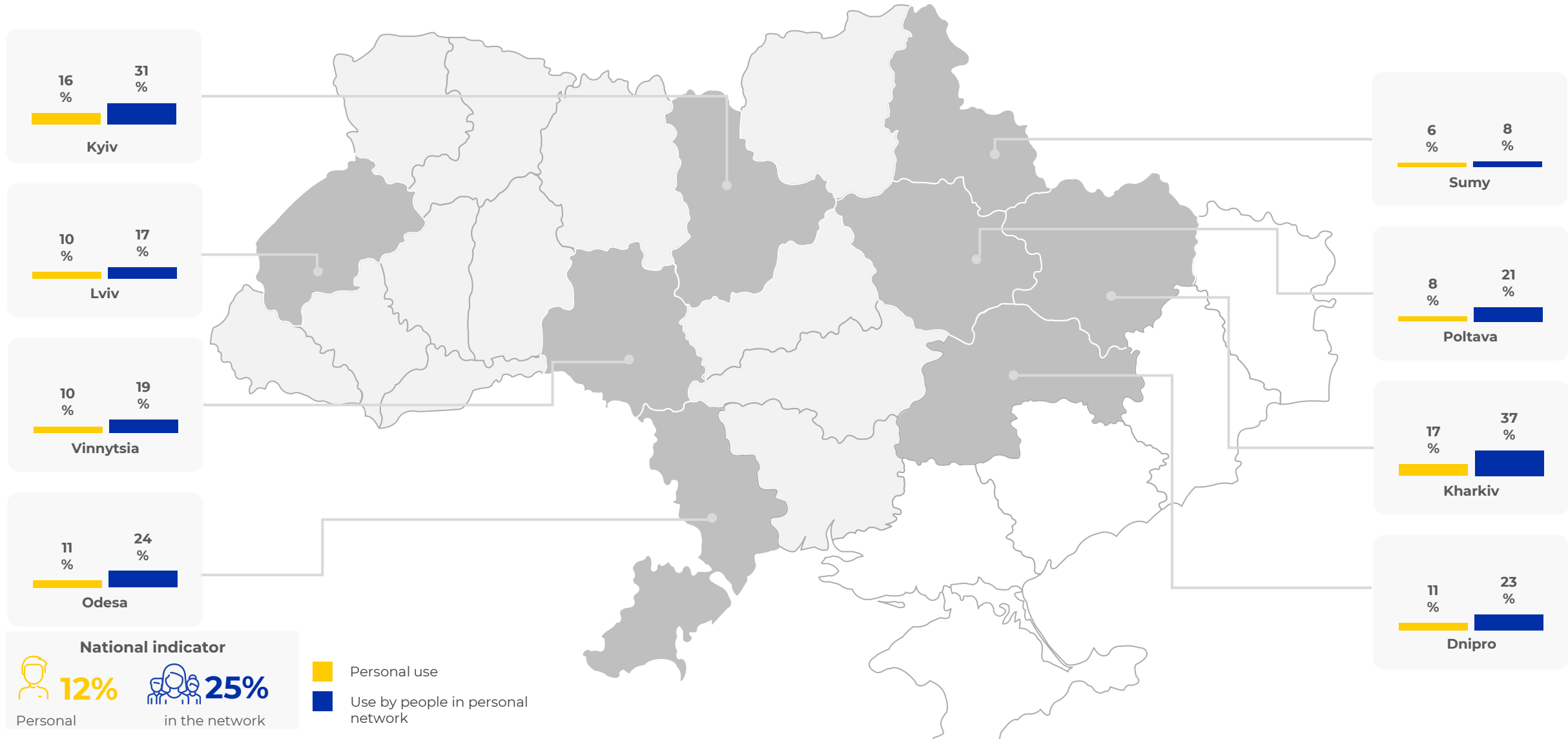
Base:
West N= 298 Center N= 172
East N= 356 North N= 465
South N= 165



Question:
To what extent do you trust the news in regional...?
% of those who trust completely or in part

Base:
Every oblast, N=300

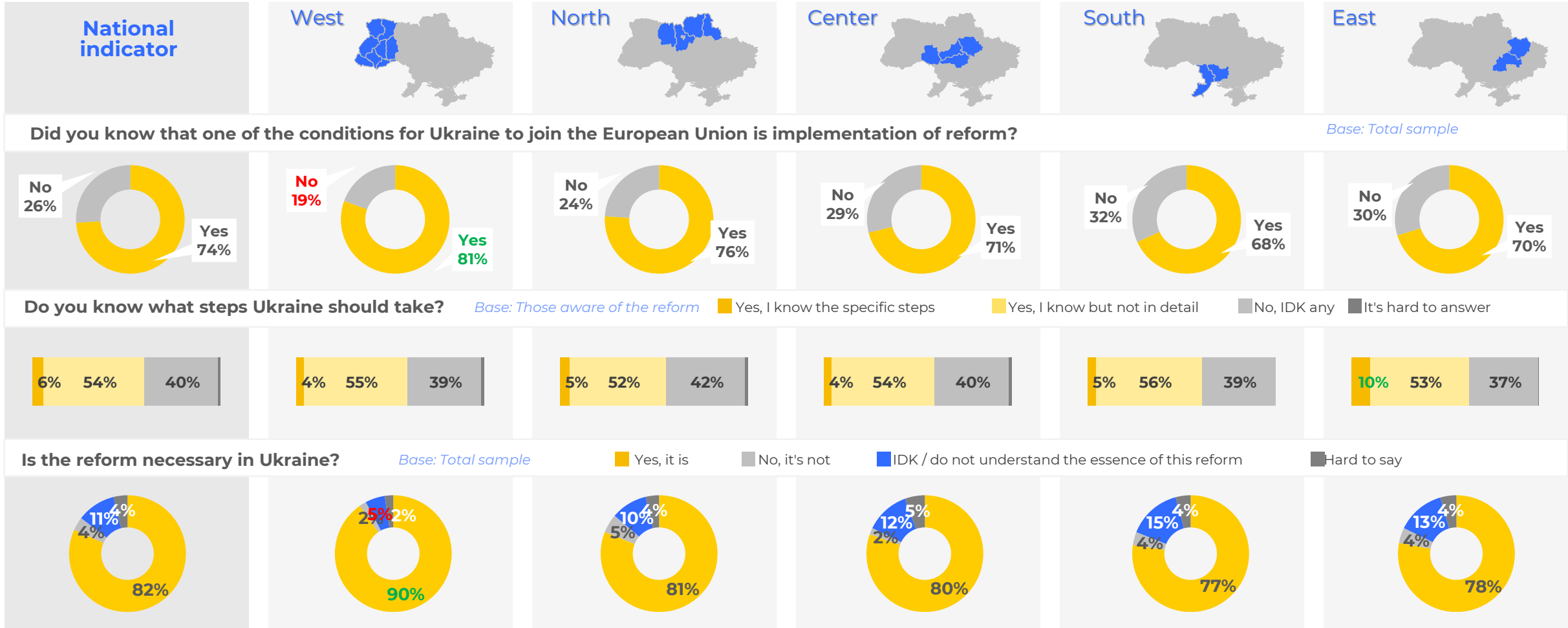
Use of Russian media by region. 2022



Question:
 Have you used any Russian media for news within the past 30 days?
 Are there people in your personal network who use Russian media to get news?

Base:
 Every oblast, N=300

Anti-corruption reform. Regional differences. 2022



Question:

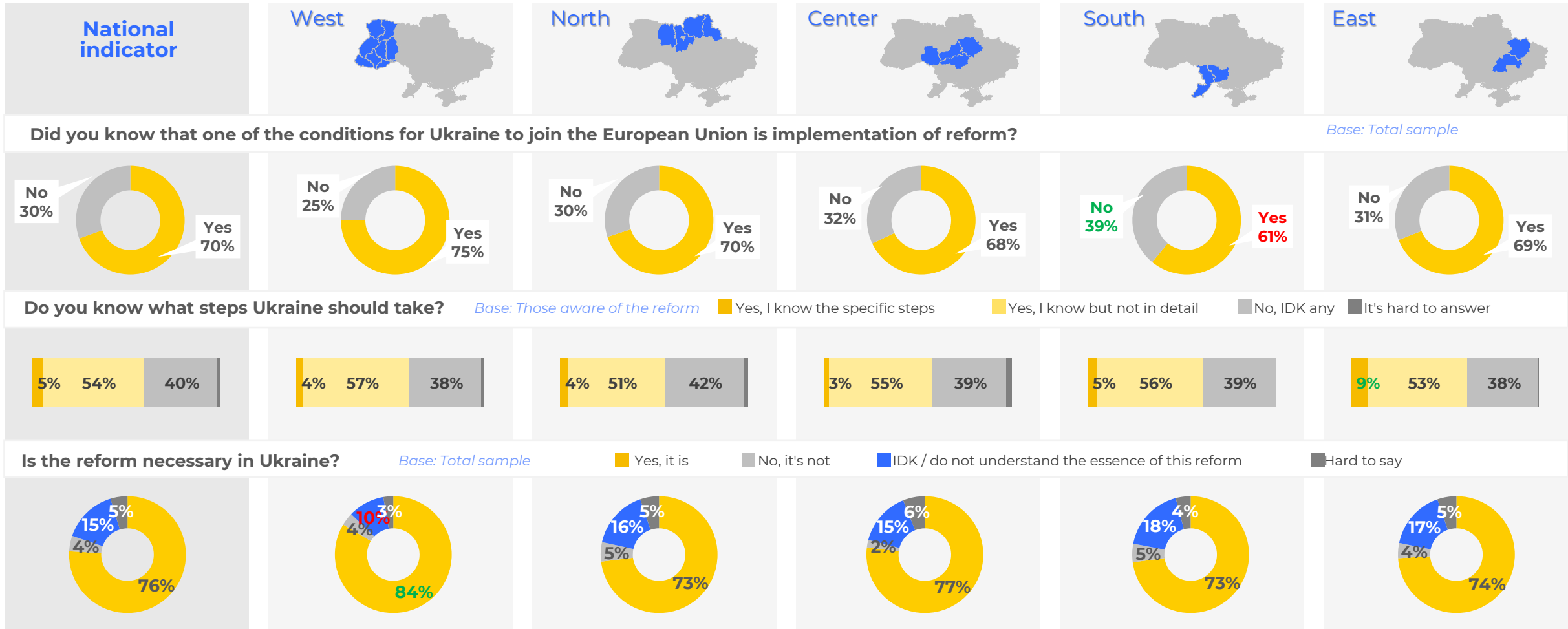
Did you know that one of the conditions for Ukraine to join the European Union is to implement the following reforms?
 Do you know what steps / conditions Ukraine should perform within the reform?
 In your personal opinion, are the following reforms necessary in Ukraine?

Base:

Total sample, N=1,456
 Those who are aware of the reform,
 N = 1,078 National, West 240, North 353, Center 122,
 South 112, East 250

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

Judicial reform. Regional differences. 2022

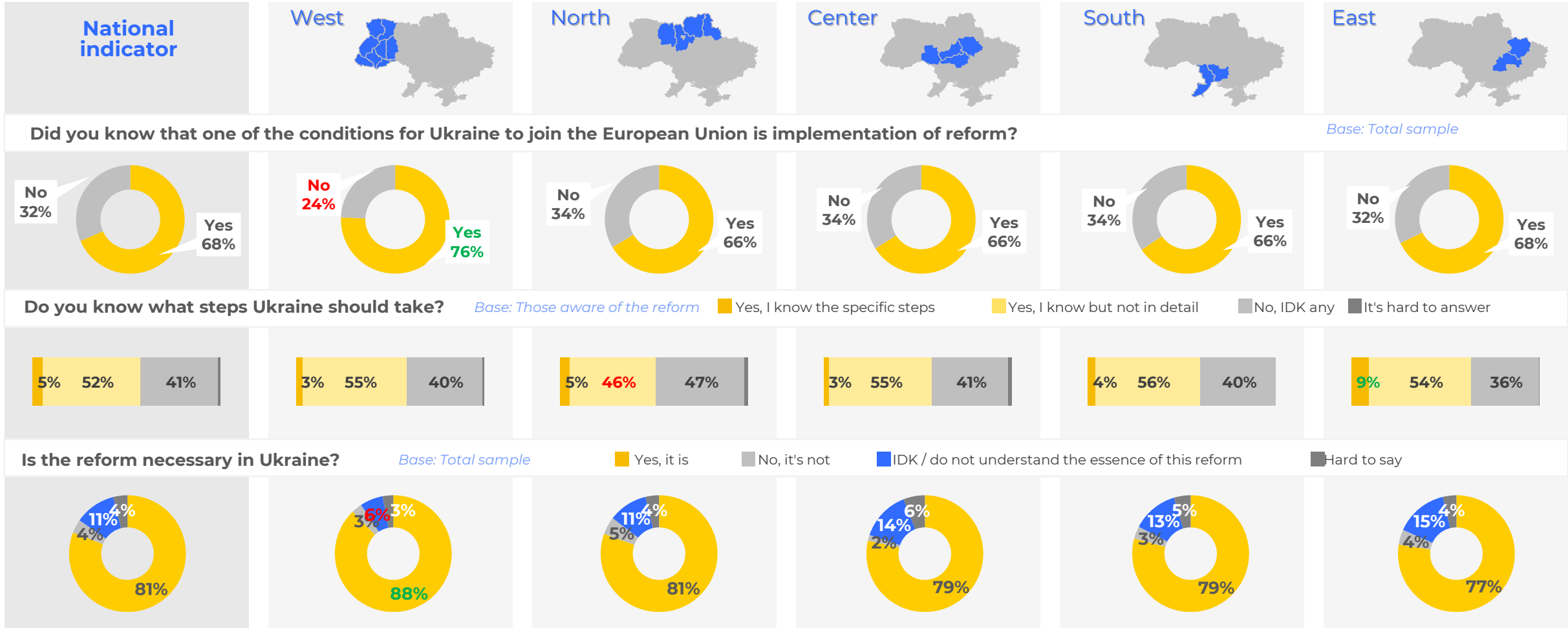


Question:
Did you know that one of the conditions for Ukraine to join the European Union is to implement the following reforms?
Do you know what steps / conditions Ukraine should perform within the reform?
In your personal opinion, are the following reforms necessary in Ukraine?

Base:
Total sample, N=1,456
Those who are aware of the reform,
N = National, 1,012, West 224, North 326, Center 117,
South 100, East 246

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

Anti-money laundering. Regional differences. 2022



Question:

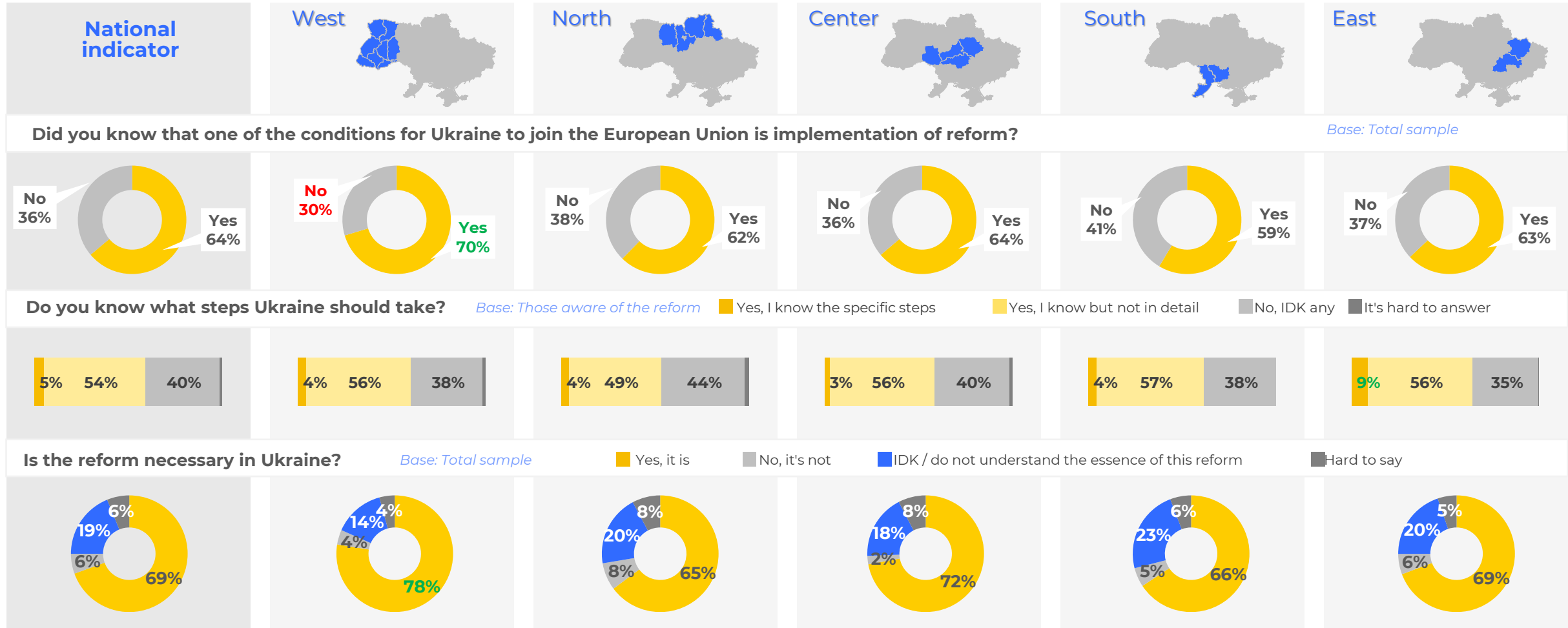
Did you know that one of the conditions for Ukraine to join the European Union is to implement the following reforms?
Do you know what steps / conditions Ukraine should perform within the reform?
In your personal opinion, are the following reforms necessary in Ukraine?

Base:

Total sample, N=1,456
Those who are aware of the reform,
N = 997, National West 225, North 309, Center 113,
South 108, East 241

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

Reform of the Constitutional Court. Regional differences. 2022

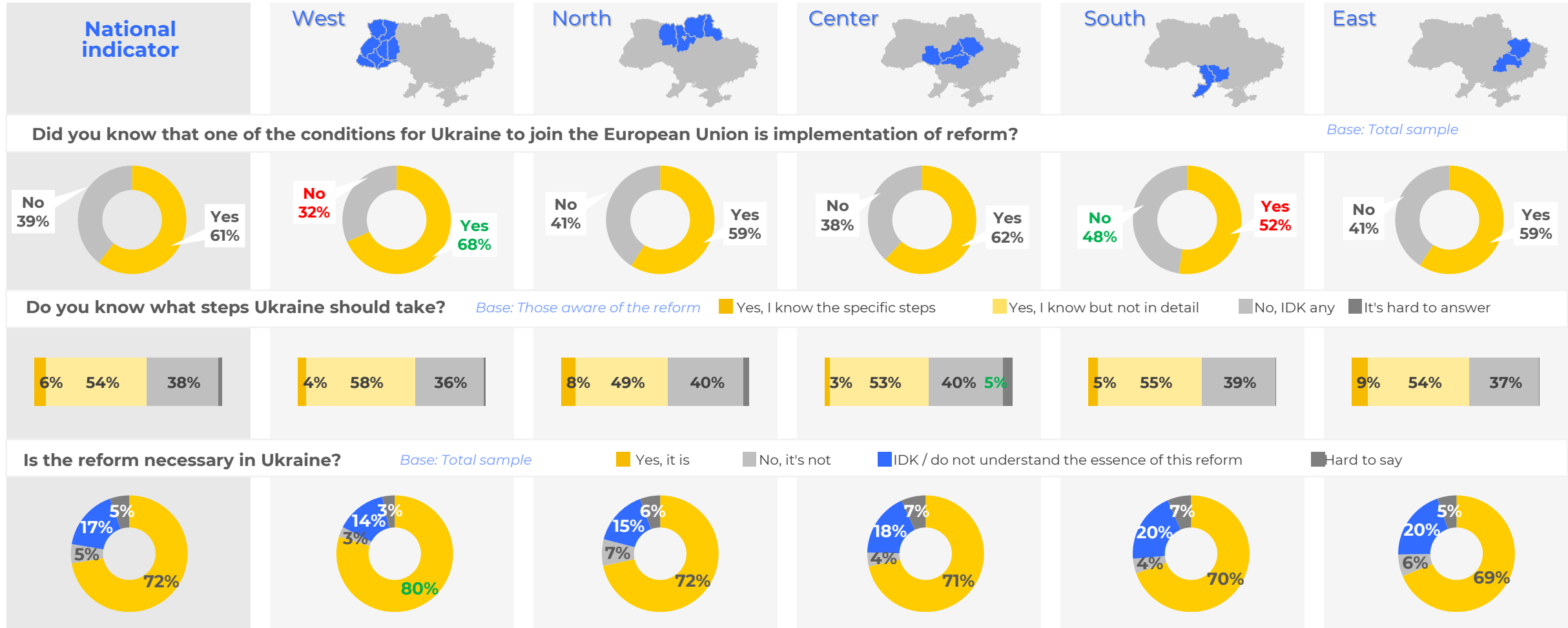


Question:
Did you know that one of the conditions for Ukraine to join the European Union is to implement the following reforms?
Do you know what steps / conditions Ukraine should perform within the reform?
In your personal opinion, are the following reforms necessary in Ukraine?

Base:
Total sample, N=1,456
Those who are aware of the reform,
N = 930 National, West 210, North 290, Center 110,
South 97, East 224

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

Enforcement of the anti-oligarchic law. Regional differences. 2022

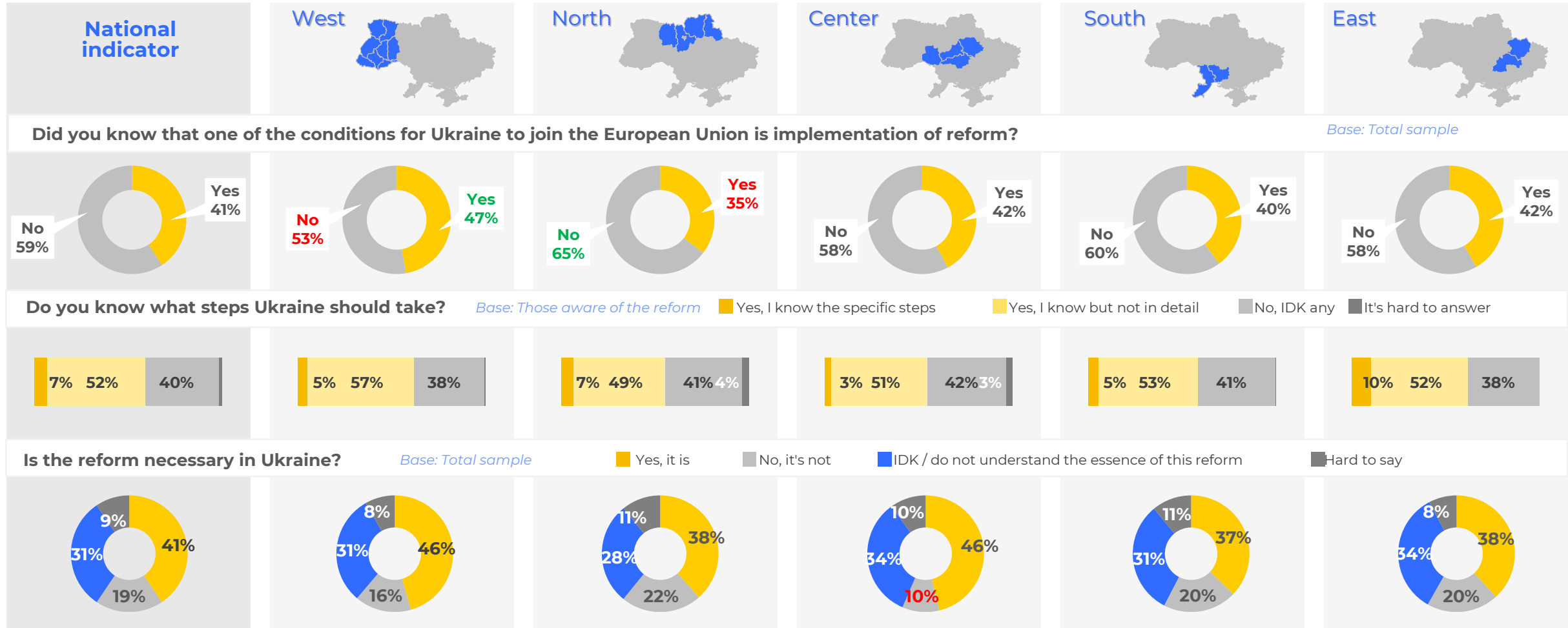


Question:
Did you know that one of the conditions for Ukraine to join the European Union is to implement the following reforms?
Do you know what steps / conditions Ukraine should perform within the reform?
In your personal opinion, are the following reforms necessary in Ukraine?

Base:
Total sample, N=1,456
Those who are aware of the reform,
N = National 881, West 204, North 274, Center 106,
South 87, East 210

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

Changing the legislation on national minorities. Regional differences. 2022

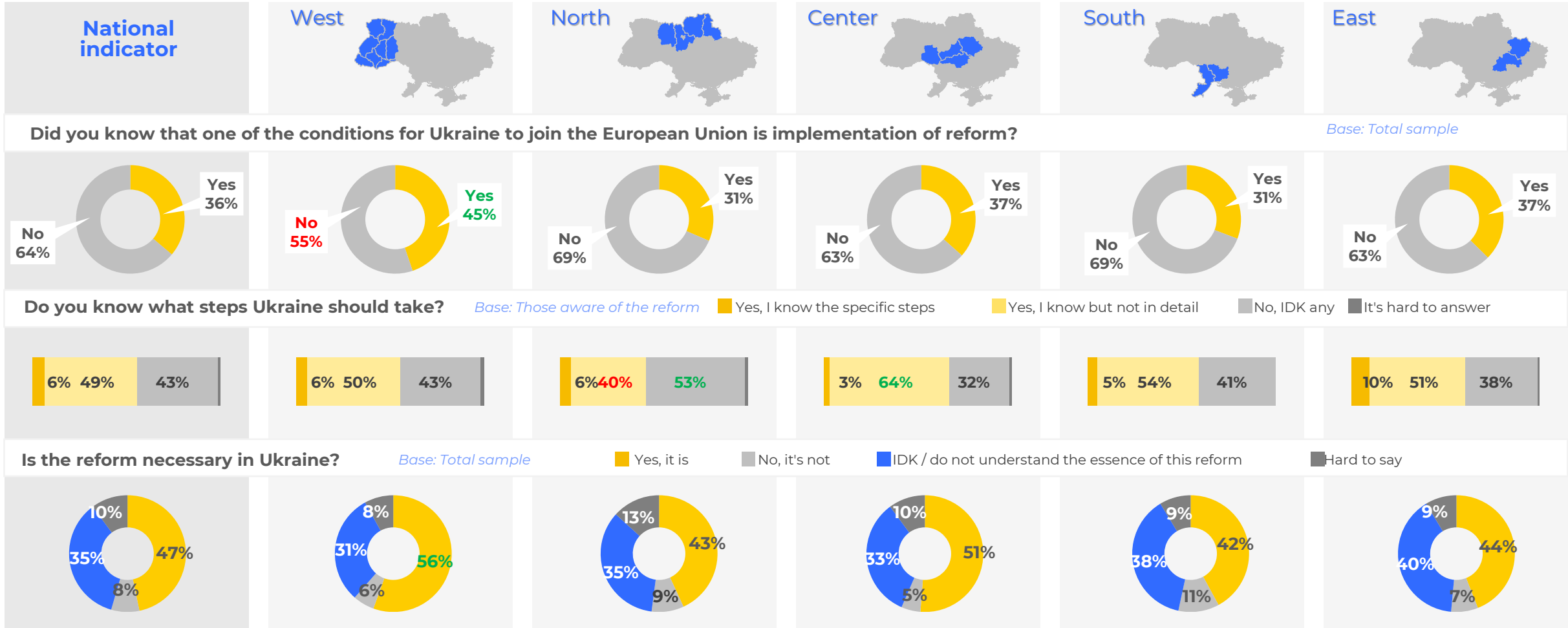


Question:
Did you know that one of the conditions for Ukraine to join the European Union is to implement the following reforms?
Do you know what steps / conditions Ukraine should perform within the reform?
In your personal opinion, are the following reforms necessary in Ukraine?

Base:
Total sample, N=1,456
Those who are aware of the reform,
N = National 593, West 141, North 165, Center 72, South 66, East 149

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

Alignment of the legislation of audiovisual media with that of the EU. Regional differences. 2022



Question:
Did you know that one of the conditions for Ukraine to join the European Union is to implement the following reforms?
Do you know what steps / conditions Ukraine should perform within the reform?
In your personal opinion, are the following reforms necessary in Ukraine?

Base:
Total sample, N=1,456
Those who are aware of the reform,
N = National 527, West 134, North 146, Center 63,
South 51, East 133

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



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