



UKRAINIAN MEDIA LANDSCAPE



2022-2024

**Changes in Media
During the Full-Scale
Invasion**

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Ukrainian Media Landscape — 2024 is a continuation of a series of similar reviews published every few years since 2010 and prepared by the Academy of Ukrainian Press in cooperation with the Konrad-Adenauer-Stiftung. The Media Landscape traditionally contains an overview of the prevailing trends in the media field of Ukraine.

Intended for journalists, political scientists, and everyone interested in the modern history of Ukraine.

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Valeriy Ivanov,

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UKRAINIAN JOURNALISM AMID GREAT CHALLENGES

Since 2010, the Academy of Ukrainian Press, in cooperation with the Konrad Adenauer Foundation in Ukraine, has periodically published analytical reviews of the state and trends in Ukrainian media development. In 2024, we continue this tradition. This issue comes out during a time of great trials. The war has brought its own corrections to the life of the entire country. Of course, the media and journalists have both suffered from the actions of the aggressor and actively cover what is happening on the front lines and in the rear.

One of the biggest threats facing Ukraine today is the attempts to disorient Ukrainian citizens, aiming to deprive them of certainty about tomorrow and their faith in their ability to fight and win. The analytical study by the head of the Independent Media-Union of Ukraine, Serhiy Shturkhetsky, is devoted both to the attempts of the Russian propaganda apparatus to influence media in Ukraine and to the work of Ukrainian journalists in countering disinformation, aimed at professionally informing the audience about events in the country and the world. The author thoroughly examines the foundations and history of Russian propaganda. In particular, the analysis focuses on Russia's disinformation activities not only in Ukraine but around the world, allowing for greater influence on Global South countries. The study also closely examines the methods of spreading Russian disinformation in Ukraine and the main narratives designed to mislead the audience. Special attention is paid to the active use of social networks to spread false information and rumors, creating an atmosphere of uncertainty and fear. Particular attention is given to the influence of Russian propaganda in the occupied territories and its comprehensive nature in conjunction with other direct measures of population control. Specific tools for countering propaganda and disinformation are also considered: fact-checking platforms, measures to promote critical thinking and media literacy, and the use of modern technologies to combat disinformation.

The changes in the operations of Ukrainian media since the start of the full-scale invasion are thoroughly examined by Oleksiy Pohorelov, the

President of the Ukrainian Association of Media Business. The war itself has become a significant challenge, posing constant physical threats to both the audience and journalists. Military actions, affecting almost the entire territory of the country, have led to large-scale displacements. This has been a major challenge for Ukrainian media, which had to rapidly restructure their work to address their target audience. One particular challenge was the sharp increase in people's need to stay informed and up-to-date with news. Entertainment content has taken a back seat. Unfortunately, non-professional media like Telegram and YouTube channels are often used as the main news source. This situation was influenced by difficulties with electricity supply and the high speed of news updates on social networks. Another factor that played a role is the relatively low trust in Ukrainian media, with less than half of the population trusting them. This is a significant challenge and a motivating factor for improving professionalism and adhering strictly to journalistic standards. Another crucial requirement for media content during wartime is its usefulness to the audience, meaning the media should provide up-to-date information about the physical reality that helps people respond adequately to challenges, survive, and act effectively during the war.

A special focus is given to the «Unified News» marathon, its history, role, level of trust, and the appropriateness of continuing its broadcast. The war also highlighted another type of media: frontline newspapers. These newspapers bear a unique responsibility as they are distributed in areas often lacking electricity and even mobile communication. Under such conditions, printed newspapers distributed at water distribution points or similar places provide the audience with reliable information about the situation in the community and clear guidance on actions in the current circumstances.

The importance of frontline media was further explored by Serhii Tomilenko, head of the National Union of Journalists of Ukraine (NUJU) and a member of the Executive Committee of the European Federation of Journalists. Regional media play a crucial role by providing their audiences with accurate information about what is happening 'on the next street.' According to NSJU research, the main challenges are the temporary suspension or complete cessation of editorial work, loss of access to premises and property, loss of revenue, forced cost reductions, including layoffs and unpaid leave, and staffing issues. Complicated relations with local authorities add to these challenges. On a positive note, an increase in audience trust towards local media and their digitization has been observed.

A compelling study of the state of Ukraine's print media was presented in this media landscape by renowned Ukrainian expert and media manager Serhii Chernyavsky. He conducted an in-depth study of the quantity of press in Ukraine, the challenges faced by media professionals, ways to address these challenges, and the prospects for industry development in the near future. The state of the advertising market, reasons for its decline, as well as the reduction of subscriptions and retail sales, are separately analyzed.

The most pressing issues regarding the use of modern technologies in media, social networks, streaming platforms, and interactive tools for distributing information were analyzed by Vitalii Moroz, program manager of eQualitie in Ukraine, and Lesia Bidochko, Deputy Head of the Research Center 'Detector Media.' The authors highlight both the reasons and tools for implementing new technologies at various stages of media production and distribution. Media digitization is gradually becoming profitable due to easier access and more opportunities to provide content. The role of popular messengers, such as Telegram and TikTok, and the associated problems in informing the audience are also considered. Additionally, there is an analysis of streaming platforms and the use of artificial intelligence in Ukraine.

Of course, the analytical materials of Media Landscape 2024 do not allow us to cover the entire diversity of Ukrainian media activities during the war. They only outline some of the key challenges in their functioning. We hope these materials will be useful for journalists, media researchers, activists, and everyone who understands and is interested in the significance of media work for the country's life during times of hardship.

Serhiy Shturhetsky,

head of the Independent Media-Union of Ukraine

MEDIA AND PROPAGANDA:

STUDYING THE IMPACT OF RUSSIAN
PROPAGANDA ON MEDIA IN UKRAINE
AND THE EFFORTS OF UKRAINIAN MEDIA
IN COUNTERING DISINFORMATION

Russian propaganda and disinformation have become an integral part of Russia's information war against Ukraine, especially noticeable since the full-scale invasion in 2022. As is its customary practice, the Kremlin actively uses media to manipulate public opinion both in Ukraine and abroad, with the goal of justifying its aggressive actions and discrediting Ukraine. This has become yet another serious challenge of wartime for Ukrainian media, which initially responded in isolation and in a purely reactive manner. However, today, Ukrainian media have been making more systematic and effective efforts to counter disinformation and convey truthful information to their audiences.

The use of propaganda as a type of informational influence during an attack on a potential or real enemy is not new for Russia and has its roots in Soviet traditions. During Soviet times, journalism faculties trained 'ideological front-line fighters,' and even after the dissolution of the USSR, Russia continued the tradition of recognizing propaganda as a separate activity from journalism, albeit not considered shameful. In 2011, the Moscow professor and 'father of Russian journalism' Ya. Zasursky regrettably acknowledged that Russian media were turning into media reminiscent of Soviet times—tools of mass information and propaganda. 'This is certainly happening, and it's a shame because propaganda means a certain kind of violence over a person's mind,' the professor remarked.¹

The Public Board on Press Complaints in Moscow, on February 13, 2014, in decision No. 98 regarding a complaint from Ukraine's Commission on Journalistic Ethics about Dmitry Kiselyov's segment 'Ukrainian Veche,' acknowledged the situation of the growing and strengthening presence of propaganda in the Russian media sphere as unequivocally abnormal. Ukrainian media saw this decision as a temporary

¹ <https://ms.detector.media/profstandarti/post/10613/2011-01-11-prezydent-zhurfakamgu-yasen-zasursky-rossyyskaya-prensa-yz-smy-vozvrashchaetsya-k-smyp/>

assistance since it contained statements about disinformation and incitement of ethnic hatred. However, the part of the decision worth noting is that this segment was more propagandistic than journalistic, and thus journalistic standards (five out of seven of which were violated) could not be applied to this type of content.²

However, the dominant role of propaganda in the Russian media space and its influence on neighboring countries had been determined long before this faint last call to defend journalism by the ‘Public Board,’ which is financed by the Russian government. In 2013, an article was published citing a speech by the Russian General Staff’s chief, General Gerasimov, which led to the so-called ‘Gerasimov Doctrine’ in defining hybrid warfare. The general was attributed with the words: ‘the role of non-military methods in achieving political and strategic goals has increased, which in some cases have exceeded the effectiveness of military force,’ with particular reference to ‘measures of information confrontation.’ Thus, at least since 2013, Russian military and political leadership has openly declared the importance of propaganda as a powerful tool in accomplishing military objectives.³

Russian propagandists gained experience (and state awards) in controlled territories or by creating their own resources directly in other countries. For example, an analysis of content from Russia’s state-controlled Sputnik in occupied Abkhazia from 2008 to 2019 led researchers to conclude that ‘we are faced with the creation and deliberate dissemination of propagandist narratives. A society that is systematically fed disinformation and fact manipulation can become supportive of military actions aimed at restoring the old glory, the former empire at any cost.’⁴

Russian propaganda has been highly ‘successful’ within Russia itself due to censorship, media control, and repression of dissent. However, it is also spreading in many developing countries, including China, where estate media sympathize with Russia, and other countries in the so-called ‘Global South’—India, African countries, and Latin America. In this

² <https://imi.org.ua/news/gromadska-kolegiya-rosiji-zi-skarg-na-presu-viznala-dmitra-kiselova-dezinformatom-i7524>
<https://www.presscouncil.ru/index.php/praktika/rassmotrennye-zhaloby/3007-zhaloba-na-vesti-nedeli-s-dmitriem-kisilevym-iz-za-osveshcheniya-evromajdana?showall=&start=9>

³ https://vpk.name/news/85159_cennost_nauki_v_predvidenii.html

⁴ <https://jecs.pl/index.php/jecs/article/view/1437>

regard, Russian information policy bears similarities to the propaganda practices of Nazi Germany during World War II, where the ‘effectiveness’ of propaganda was rooted in a complete cleansing of the information space and repression. Such characteristics of Nazi propaganda were also noted by the aforementioned Ya. Zasursky, although he dismissed the possibility of this being repeated in Russia.⁵

In Ukraine’s information space, there was (and in some cases still is) a prevalence of these propaganda narratives, which were disseminated by certain television channels until ‘on the evening of February 2, 2021, the website of the President of Ukraine announced that Volodymyr Zelensky imposed sanctions on Viktor Medvedchuk’s close ally and three television channels: 112 Ukraine, NewsOne, and Zik.’⁶ However, the legal soundness of this decision raised questions, and the Information Security Strategy, which would indicate systemic and consistent actions to protect the country’s information space, was only approved by a Presidential Decree on December 28, 2021.⁷

At the start of the full-scale invasion in February 2022, Ukraine’s media space already had a well-developed network of anonymous Telegram channels. Analysis (published in October 2021) of the narratives of their information agenda clearly indicated links with Russian centers of propaganda dissemination.⁸ A year later, the publication DM released research on at least 300 popular Telegram channels spreading ‘Kremlin disinformation and manipulations among Ukrainians.’⁹

⁵ <https://youtu.be/TLUzJbOM2bA?si=m03rUBD9MTELuT50>

⁶ <https://www.radiosvoboda.org/a/kanal-y-medvedchuksankciy-zelenskiy-tv-112-zik-newsone-zaborona/31082909.html>

⁷ <https://www.president.gov.ua/documents/6852021-41069>

⁸ <https://ms.detector.media/trendi/post/28366/2021-10-25-tsentr-protydiidezinformatsii-sklav-perelik-telegram-kanaliv-yaki-prosuvayut-prorosyyski-naratyvy/>

⁹ <https://detector.media/monitorynh-internetu/article/205954/2022-12-14-kremlivska-gidra-300-telegram-kanaliv-yaki-otruyuyut-ukrainskyy-infoprostir/>

The influence of Russian propaganda on the media in Ukraine

Russian propaganda has been and continues to be disseminated in Ukraine through various channels, including traditional media, social networks, and messaging platforms. According to Ukrainian researcher Diana Dutsyk, key tactics include manipulating data and statistics to create an impression of Ukraine's failure on the frontlines and its dire internal situation, accusing Ukraine of Nazism, genocide of the Russian-speaking population, developing weapons of mass destruction, and denying Russian war crimes while shifting the blame to Ukraine, making attempts to undermine international support for Ukraine and incite hostility towards Ukrainian refugees.¹⁰

Areas of Russian propaganda influence on media, based on analysis of recent publications:

1. By spreading disinformation: Russian propaganda aims to create a negative image of Ukraine on the international stage and undermine trust in Ukrainian institutions. For example Russian propaganda uses narrative about «Nazis» in Ukraine to dehumanize Ukrainians and justify Russian aggression.¹¹
2. Control of the information space (this primarily concerns the occupied territories, which is discussed in more detail below).¹²
3. Manipulation of historical context, attempts to claim victories in World War II and distort facts related to Ukraine's struggle for independence. This creates a false perception of the historical legitimacy of Russia's actions in Ukraine.¹³
4. Use of social media, which has become an important tool for spreading disinformation. Russian propagandists actively use platforms like Facebook, Twitter, and Instagram to disseminate fake news and manipulations that can reach a wide audience.

¹⁰ <https://akademie.dw.com/en/how-russian-disinformation-manipulates-data-onukraine-war/a-68771554>

¹¹ https://library.pp-ss.pro/index.php/ndippsn_20231212/index
<https://cedem.org.ua/analytics/epidemiya-dezinformatsiy/>

¹² <https://www.radiosvoboda.org/a/novyny-pryazovya-ukrayinske-movlennya-v-okupatsiyi/32502399.html>

¹³ <https://internews.ua/opportunity/How-Russia-manipulates-Ukraine-historical-past>
<https://suspilne.media/culture/224927-ak-rozvalasa-rosijska-propaganda/>

5. Psychological impact on the population – creating an atmosphere of fear and uncertainty among Ukrainians. This may manifest in rumors of potential military actions, mobilization, or economic difficulties, undermining the morale of the population and causing panic.
6. International context, as Russian propaganda attempts to influence not only the Ukrainian public but also the international community, forming a negative image of Ukraine and attempting to reduce support from Western countries. This includes efforts to discredit the Ukrainian army and government on the international stage.¹⁴

Regional Aspect of Propaganda Influence

When planning to create a network and system of influence on society and media in a given region, as identified in the research by Oleksandr Horokhovskiy, «Russian propaganda was quite effective, utilizing several key factors of each region for deeper penetration of its messages.»¹⁵ The researcher points to factors such as the region’s geography — its proximity to the border, economic, political, and social atmosphere, linguistic features, penetration and use of the Russian language, religious and historical specifics, ethnic composition, social moods, and the activity of citizens, presence of powerful local media and leaders of public opinion. In terms of disinformation channels, aside from already mentioned Telegram channels, media from neighboring countries, and dishonest Ukrainian media are also involved. The diversity and specificity of the narratives spread by Russian propaganda across regions can be inferred from fact-checkers’ reports from the “Bez Brekhni” project.¹⁶

¹⁴ <https://www.ukrinform.ua/rubric-factcheck/3815476-vtoma-zahodu-vidukraini-ak-rosijska-propaganda-konstruue-narativ.html>

¹⁵ <https://without-lie.info/laboratory/doslidzhennia-mapa-dezynformatsii-analiz2022-2023-rr/>

¹⁶ <https://without-lie.info/category/faktchek-rehion/>

Propaganda in Occupied Territories

Russian propaganda becomes especially pervasive and influential in territories occupied in recent years, particularly since 2014. On these lands, alongside direct informational and ideological propaganda influences, there is also a repressive state apparatus, systematic human rights violations, and mass war crimes. Media and journalists have become a direct target of Russia's aggression — in two years since the full-scale invasion, Russia committed 599 crimes against journalists and media outlets in Ukraine (according to IMI).¹⁷

In the occupied territories of Ukraine, Russian propaganda takes on a systematic and multifaceted nature, aimed at supporting the occupying regime and disinforming the local population. The main elements of this propaganda include the consistent repetition of narratives blaming Ukraine for shelling and violence, which allegedly justifies the actions of Russian troops. Additionally, claims of «genocide» by the Ukrainian side are used to divert attention from Russia's aggression.¹⁸

The occupation authorities pay particular attention to maintaining complete control over the media — preventing the existence of independent media and fostering the development of pro-Russian local media, including television, radio, and Telegram channels that broadcast propaganda content. In regions such as Kherson, new radio stations and information resources were created to disseminate Russian narratives.

Education has also become a tool of propaganda, especially noticeable in the Ukrainian territories that have been under occupation for more than 10 years. Russia has transformed the educational system in these regions into platforms for fostering patriotism towards Russia and

¹⁷ <https://imi.org.ua/monitorings/599-zlochyniv-skoyila-rf-proty-media-tazhurnalistiv-za-dva-roky-i-try-misyatsi-povnomashtabnoyi-i61556>
<https://www.radiosvoboda.org/a/viyina-media-fiksery-voyenni-zlochynyobstril-okupovani-terytoriyi-svoboda-slova/32386940.html>
<https://www.radiosvoboda.org/a/viyina-media-fiksery-voyenni-zlochyny-obstril-okupovani-terytoriyi-svoboda-slova/32386940.html>

¹⁸ <https://www.radiosvoboda.org/a/novyny-pryazovyarosiyski-media-propahanda-okupatsiya-yak-hlushyty/32912049.html>
<https://www.radiosvoboda.org/a/novyny-pryazovyarosiyska-propahanda-khersonshchyna-zaporizhzhya-okupatsiya/32013468.html>
<https://cpd.gov.ua/main/yak-diye-kremlivska-propaganda-na-okupovanyhterytoriyah/>

hatred towards Ukraine. This includes introducing Russian curricula and holding propaganda activities in schools.¹⁹

One of the most important vehicles for propaganda is disinformation spread via social media, especially Telegram, which has become the primary channel. Russian propagandists use social media platforms to manipulate public opinion and disseminate fake news.²⁰

Strategies of Russian propaganda in the occupied territories involve the creation of local information networks that broadcast propaganda 24/7 and psychological manipulation of children, who are ideologically indoctrinated through educational programs that instill hatred toward Ukraine and encourage service in the Russian army.²¹

Efforts of Ukrainian Media in Countering Disinformation

The seriousness of the challenges Ukraine has faced due to the aggressive activities of Russian propaganda has led to the strengthening of existing and the emergence of new media projects aimed at developing media literacy and combating disinformation. Ukrainian media have been actively countering Russian propaganda by exposing fake news and disseminating truthful information. According to a review conducted by the Ukrainian Institute of Media and Communication, since February 24, 2022, national and regional media have produced a wide range of media products focused on countering disinformation and promoting media literacy.²²

As noted in the review, «the national media implemented 103 such projects, of which 65 are regular... regional media created 55 projects, 35 of which are regular. This essentially means that each editorial team produces an average of 1-2 projects aimed at countering disinformation, in addition to including relevant content in news reports.»²³

¹⁹ <https://www.hrw.org/report/2024/06/20/education-under-occupation/forced-russification-school-system-occupied-ukrainian>

²⁰ https://lb.ua/blog/oleg_sabura/593234_bozhvillya_rosiyskoi_propagandi.html

²¹ <https://cpd.gov.ua/main/yak-diyе-kremlivska-propaganda-na-okupovanyh-terytoriyah/>

²² <https://detector.media/infospace/article/230408/2024-08-02-z-pochatkom-velykoi-viyny-ukrainski-media-zaynyalysya-temoyu-mediagramotnosti-ta-protydii-dezinformatsii-analytika-uimk/>

²³ <https://detector.media/infospace/article/230408/2024-08-02-z-pochatkom-velykoi-viyny-ukrainski-media-zaynyalysya-temoyu-mediagramotnosti-ta-protydii-dezinformatsii-analytika-uimk/>

The emergence of these media projects is also driven by audience demand. Research shows that 87% of the audience considers fake news a negative phenomenon, and 94% see disinformation as one of the greatest threats to the future. At the same time, 62% admit that they do not always find it easy to recognize fakes created using artificial intelligence.

According to the audience, the key words for 2023 have been resilience, peace, hope, artificial intelligence, change, courage, perseverance, struggle, and freedom.²⁴

Fact-checking platforms

Fact-checking platforms in Ukraine have continued their active and, at times, selfless work in debunking fakes and disproving disinformation since the early days of the full-scale invasion.²⁵

StopFake was founded in 2014 with the aim of combating disinformation about Ukraine. StopFake checks facts, debunks fakes, and provides analytical materials on Russian propaganda. The platform is also engaged in raising media literacy among the population.²⁶

VoxCheck, a fact-checking project by VoxUkraine, specializes in verifying facts related to politics and social issues. The project has a section called «Vox on the War,» which debunks fakes related to the war in Ukraine. One of its valuable analytical resources is the “russian disinformation diary,” available in 10 languages.²⁷

Without Lies (Без брехні) is an initiative aimed at combating disinformation and propaganda in Ukraine. The project’s main goal is to verify facts and disprove false information spread in media and social networks. «Without Lies» actively collaborates with journalists and media organizations, providing them with tools to improve the quality of information and prevent the spread of fakes.²⁸

NotaEnota is known not only for teaching critical thinking through gaming but also for debunking disinformation on social media. The initiative

²⁴ <https://brandukraine.org.ua/en/projects/nations-against-disinformation-20-protidiya-propagandi-ta-fejkovim-novinam-v-epohu-shtuchnogo-intelektu/>

²⁵ <https://ms.detector.media/manipulyatsii/post/29254/2022-03-30-faktchekery-tse-sapery-yaki-zneshkodzhuyut-informatsiyi-miny/>

²⁶ <https://www.stopfake.org/uk/golovna/>

²⁷ <https://without-lie.info/>

²⁸ <https://russiandisinfo.voxukraine.org/>

also pioneered the classification of Russian-Ukrainian war informational manipulations through the project «Where's the Fake?» (Де фейк?).²⁹

On the Other Side of the News (По той бік новин) is an independent information campaign focusing on media literacy, fact-checking, and the development of critical thinking. Since 2018, it has been implemented by the Institute for Regional Press Development.³⁰

Detector Media monitors Ukrainian media, analyzes their activities, and provides recommendations for improvement. The team also engages in fact-checking and debunking fakes. One of their key analytical products is the «Kremlin Disinformation Chronicles» (Хроніки кремлівської дезінформації).³¹

The **Institute of Mass Information (IMI)** monitors the media, conducts research, and provides recommendations for improving journalism quality. Since the full-scale invasion, IMI has also been monitoring Russian war crimes in the media, continuously updating this information.³²

The **Center for Countering Disinformation at the National Security and Defense Council (NSDC)** monitors disinformation, conducts analysis, and develops strategies to counter information attacks. The Center has launched the «CPSYOP» project, where videos debunking Russian propaganda are published.³³

The **Media Education and Media Literacy Portal** by the Academy of Ukrainian Press offers methodological materials and educational opportunities for journalists and teachers.³⁴

Suspilne actively fights disinformation and receives support from international partners to implement projects aimed at increasing media literacy and debunking fakes.³⁵

²⁹ <https://www.prostir.ua/event/vebinar-prezentatsiya-informatsijni-vkydy-rosijsko-ukrajinskoji-vijnny/>
<https://www.facebook.com/notaenota1/>

³⁰ <https://behindthenews.ua/>

³¹ <https://disinfo.detector.media/>

³² <https://imi.org.ua/monitorings/medijni-zlochyny-rosiyi-u-vijni-proty-ukrayiny-onovlyuyetsya-i44098>

³³ <https://cpd.gov.ua/>

https://youtu.be/FL9MNBBfD2A?si=11_hl2V5Esvmdg_4

³⁴ <https://medialiteracy.org.ua/>

³⁵ <https://suspilne.media/>

The state news agency **Ukrinform** has actively embraced social media. Despite challenges related to management changes, it has maintained a significant presence online, with 896,000 subscribers on YouTube.³⁶

Separate projects aimed at countering disinformation:

At the same time, the media often uses unconventional methods of informing that can compete for the audience's attention with propaganda. Specifically, interactive surveys, quizzes, and explanations are conducted on social media to enhance media literacy. For example, the project «NotaEnota» uses gamification to teach critical thinking to both children and adults through play. The website hosts 200 various types of tasks for organizing intellectual games and quizzes on anti-fake topics.³⁷

The «Fake Control» section on «Ukrainian Radio» is a daily segment on the morning show «Today. Morning,» where hosts Olena Zelenchenko, Roman Kolyada, Serhiy Stukanov, and others debunk fakes and manipulations. This section airs during the time when the «Detector Media» podcast debunking disinformation, «Russian Fake...,» was previously broadcast since the early days of the large-scale war. Thanks to «Ukrainian Radio,» the program was accessible, including in temporarily occupied territories.³⁸

Television programs «Beware, Fake!» and «TOP-5 Fakes» air respectively on the 1+1 and FREEDOM channels. Under the expertise of «Detector Media,» the television program «Anatomy of a Fake» was prepared for the European Russian-language channel «New World.»³⁹

³⁶ <https://www.youtube.com/c/UkrinformTV>

³⁷ <https://notaenota.com/>

³⁸ <https://stv.detector.media/suspilna-korporatsiya/read/8475/2024-08-01-ukrainske-radio-zapustylo-novyj-antyfejkovyj-proiekt-u-rankovomu-prajmi/>

³⁹ <https://filter.mkip.gov.ua/oberezhno-fejk-ta-top-5-fejkiv-medijni-projekty-shho-rozvinchuyut-populyarni-omanlyvi-tezy-rosijskoyi-propagandy/>
<https://go.detector.media/na-yevropejskomu-rosijskomovnomu-telekanali-novyj-mir-startuye-proekt-vadima-miskogo-anatomiya-fejka/>

Grant Support

In the last two years, several notable projects in countering disinformation have been implemented through grant initiatives. One stand-out project is «Mediengeist 2.0,» an accelerator supporting disinformation-countering initiatives. In 2022, 30 projects received a total of 86,000 euros in support. The winners implemented ideas ranging from creating educational platforms to social campaigns, including educational theater, blogs, and the interactive memorial «Linguocide,» dedicated to the russification of Ukraine.⁴⁰

Another significant grant competition, «Support for CSOs/Media to strengthen their response to propaganda and disinformation,» implemented by ISAR “Ednannia” with financial support from the EU, also deserves attention for the number of supported applications for media content creation”. As a result of the competition, the Selection Committee supported 17 project proposals from civil society organizations. These projects cover various directions in the fight against propaganda, from debunking myths and Kremlin propaganda fakes to creating high-quality original content about positive transformations in the country. The projects are focused on target groups both within Ukraine and abroad (Poland, Germany, Czech Republic).⁴¹

Directions for Enhancing the Capacity of Ukrainian Media to Counter Disinformation

Countering disinformation in Ukraine is a critically important task, especially in the context of the information war being waged by Russia. Ukrainian media can improve their ability to combat disinformation, particularly through increasing media literacy among the population. This includes educational programs, collaboration with educational institutions, informational campaigns, and the modernization of training and retraining for journalists and other specialists, as well as for servicemen and servicewomen of the Armed Forces of Ukraine.⁴²

⁴⁰ <https://www.mediengeist.org/>

⁴¹ <https://ednannia.ua/news/nashi-novini/12428-peremozhtsi-konkursu-grantiv-pidtrimka-ogs-media-dlya-posilennya-jikh-u-protidiji-propagandi-ta-dezinformatsiji-2>

⁴² <https://www.radiosvoboda.org/a/borotba-z-dezinformatsijeju/31299471.html>

Key directions also include the creation and support of Ukrainian-language content; collaboration with international partners, experience sharing, and joint projects; the use of cutting-edge technologies to combat disinformation (which we will discuss in more detail later); and interaction with government structures, which includes improving the legislative and regulatory framework governing the information space of Ukraine. Media activity in these areas can significantly strengthen Ukraine's information security and reduce the influence of Russian propaganda.⁴³

New Technologies for Combating Disinformation in Ukraine

The modern development of science and social relations identifies several main directions in which technologies can be utilized to enhance the effectiveness of countering disinformation. Firstly, artificial intelligence (AI) can be used for detecting fake news, data analysis, and content generation.⁴⁴

Secondly, blockchain technology can ensure transparency of information sources (using blockchain technologies to trace the origin of news and verify its authenticity, allowing users to check whether the information is genuine); it also protects content.

Thirdly, fact-checking platforms. These platforms: a) analyze information by engaging experts to verify news and messages for accuracy, helping the audience receive verified information; b) collaborate with media outlets.

Fourthly, social networks and their moderation algorithms. Social media can implement algorithms that detect and reduce the spread of disinformation, for example, by decreasing the visibility of content that contains falsehoods; they can engage media experts to develop content moderation policies that take into account the specifics of the Ukrainian information space.

Fifthly, the use of educational technologies to enhance media literacy: online courses and webinars, interactive tools, and games.

⁴³ <https://texty.org.ua/articles/111996/rekomendaciyi-shodo-zmenshennya-dezinformaciyi-na-youtube/>

⁴⁴ <https://rubryka.com/article/borotba-derzhav-z-dezinformatsiyeyu/>
<https://www.ukrinform.ua/rubric-presshall/3832551-stucnij-intelekt-ta-dezinformacia.html>
<https://cedem.org.ua/analytics/dezinformatsiya-shtuchnyi-intelekt/>

Conclusions

Russian propaganda and disinformation pose a serious threat to Ukraine, undermining societal unity and international support. Ukrainian media are making efforts to counter this by striving to enhance the media literacy of the audience and disseminate verified information. However, the fight against disinformation requires creativity from the media and joint efforts from the entire society, including state institutions, civil society, and support from international partners.

Oleksiy Pohorielov,

President of the Ukrainian Media Business Association (UMBA),
Member of the Commission on Journalistic Ethics (CJE)

NEW REALITIES OF COVERAGE OR

HOW THE WAR CHANGED
THE PRACTICE OF UKRAINIAN MEDIA
AND THE DEMANDS OF THEIR AUDIENCES

The large-scale war of Russia against Ukraine has changed many things in the information space. First and foremost, it has caused a massive displacement of Ukrainians, as people had to flee from combat. It can be roughly stated that after February 24, 2022, about 50% of Ukraine's population changed their place of residence—people moved either within the country or even relocated abroad.

The impact of the invasion was felt by 329 communities—this is the number listed in the registry of territorial communities located in areas of military operations or currently under temporary occupation, encirclement (blockade) as of November 23, 2022. The number of registered internally displaced persons, according to information released by the Commissioner of the Verkhovna Rada for Human Rights, Dmytro Lubinets, on December 1, 2022, exceeded 4.7 million people. More than 14.5 million Ukrainians left for foreign countries after February 24, 2022, and at least 11.7 million entered EU countries. 7.7 million are registered in Europe as recipients of temporary protection.

These figures indicate that even those who subscribed to publications for the first half or the first quarter of 2022 did not have access to or did not receive their newspapers in the occupied territories. Instead, they read news on the websites of publications or in their social media groups. Thus, the war influenced the change in information needs for at least 50% of Ukraine's population. These changes occurred both in the content of the information request and in the technology of accessing the content.

So, what exactly changed and how? I propose we look at the results of the study «Ukrainian Media, Attitudes, and Trust in 2022,» conducted by InMind on behalf of the international organization Internews, which implements the «Media Program in Ukraine» with financial support from the U.S. Agency for International Development (USAID). We will first examine the results of this study, conducted in the summer of 2022, and shortly thereafter, the results of this same study conducted a year later, in the summer of 2023.

Speed, Convenience, Accessibility

The first point to note is that by the beginning of autumn 2022—thus, during the period from the start of 2022—significant changes occurred in news consumption. Researchers note that «consumption of television, radio, print media, and internet websites has decreased (most notably television), and the audience for news has predominantly shifted to social networks.»

The large-scale military actions drastically changed the demand from respondents for news—there was a fundamental need to be in a constant flow of information. Monitoring news became one of the factors for feeling secure. Respondents who had previously consciously avoided any news began to track it. Before the war, most respondents primarily watched entertainment content, while news content was secondary for them. However, with the onset of hostilities, news content took precedence («I started to constantly watch the news,» «Now I cannot watch entertainment programs»).

The media also responded to the war—entertainment programs were removed from many media outlets for various reasons. One reason was that the main information needs of people shifted to issues of safety, evacuation corridors, and subsequently—places of residence, work, and ensuring fuel and electricity supplies. Additionally, the attention of most Ukrainians was focused on the developments of the war, supporting the army, and the de-occupation of territories. Therefore, those still seeking entertainment content, at least as a break from distressing news, switched to other channels for receiving entertainment (such as series, shows, etc.). The popularity of YouTube began to rise rapidly, and Telegram channels quickly became the «number one choice» among all news platforms.

The diagram below clearly shows that social networks and websites became the primary sources of both local and national news for most Ukrainians. However, before we look at which specific news sources Ukrainians relied on, let's note the number of responses. Out of 1,450 respondents in 2022, 1,079 indicated social networks as a source, 613 pointed to websites, and only 527 cited television. This is not to mention radio (159) and print publications (38).

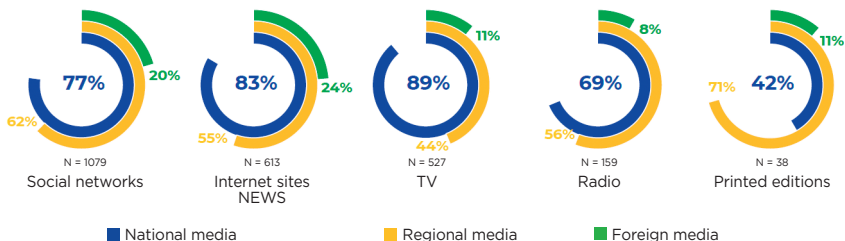
A similar analysis in 2023 revealed two significant changes. The first is a substantial increase in attention (or, more precisely, trust!) towards local print media as the main source of information among all

Media types: 2022



The majority of respondents receive news from national media - the main source is channels in social networks that cover all-Ukrainian news, national websites and national television. Among printed publications, the opposite situation is observed - survey participants prefer the regional press to the national one.

The share of different types of media among news consumers

**Question:**

What news pages/channels in social news networks have you visited in the last 30 days? (FOR WEBSITES / INTERNET SOURCES, TV, RADIO and PRINT - SIMILAR QUESTION)

Base: Consumers of news from this media

print publications—81% in 2023 compared to 71% the year before. Additionally, the number of those who identified print publications as their news source also grew, with 52 out of 1,534 respondents in 2023 versus 38 out of 1,450 in 2022. This marks a 37% increase (!). Although, of course, the absolute figure for print media is the lowest among all other information access channels, it remains a very important indicator. The fact is that local print media reliably reaches the homes of those living in specific areas. Thus, the trend indicates that the demand for quality local information has increased by 37%, and this growth is evident across all channels—both for print publications and the most popular social networks today.

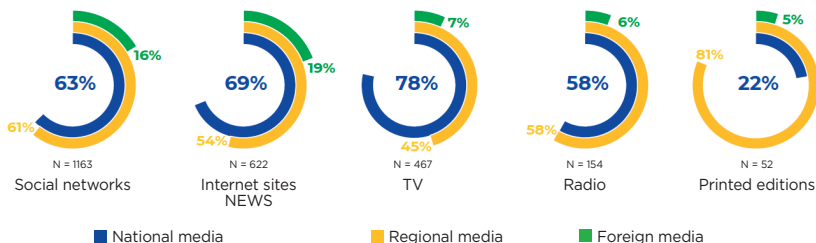
The second important change is that, despite a slight increase in the total number of respondents (1,534 individuals in 2023 compared to 1,450 in 2022), the number of people who reported receiving news from TV decreased from 527 to 467, a drop of over 11%. Meanwhile, the role of radio, websites, and social networks as news sources in 2023 remained roughly at the same level as in 2022.

Media types: 2023



News on social networks and radio is consumed equally often both nationally and regionally. Among national sources, respondents prefer television channels and Internet sites, while survey participants read regional rather than national press more often.

The share of different types of media among news consumers

**Question:**

What news pages/channels in social news networks have you visited in the last 30 days?
(FOR WEBSITES / INTERNET SOURCES, TV, RADIO and PRINT - SIMILAR QUESTION)

Base: Consumers of news from this media

Several factors contributed to this shift, impacting different people in various ways. These include power supply disruptions following the destruction of the Ukrainian energy system by Russian aggressors, worsened access to the internet and TV signals in areas near the borders with Russia and Belarus, as well as the uniformity of news content on TV due to the operation of a «single information marathon.» Additionally, there is the greater speed of important information appearing on social networks and the gradual reorientation of local print publications towards assisting their communities and residents in solving problems instead of the usual «coverage of events» and «delivery of information.»

We will discuss trust further on, but it is currently important to note that during 2022-2023, traditional media (press, radio, and television) transitioned their audience (or, more accurately, followed their audience) from traditional channels of information access (paper, TV, radio) to digital ones (i.e., the internet). At the same time, they faced a vast number of new players in the information market on social media platforms and websites—both independent (but quite popular) bloggers and organized entities (such as local administrations and official channels of various agencies and corporations).

Trust - A Key Asset

It seems that two defining (or at least extremely significant) factors have influenced the development of relationships between media and audiences during the large-scale upheaval caused by the war between Russia and Ukraine. The first is more technical: the speed of updates and ease of access to information sources. The second is the value of the information, its usefulness for addressing the issues that concern the audience.

Interestingly, audience behavior worldwide was very similar at the beginning of 2020, when everyone faced the coronavirus pandemic, and the threat was deadly. The international communications company Edelman, which has been studying trust for over 20 years, claims that trust is the primary currency in the relationships that all institutions—businesses, governments, non-governmental organizations, and media—build with their stakeholders.

In its research titled “Edelman Trust Barometer,”⁴⁵ at the beginning of 2020, the company recorded an unusually high spike in trust towards information sources that people usually trust and distrust approximately equally—specifically, towards governments and media. The chart below shows a comparison of trust in the four main types of information sources (country governments, large businesses, non-governmental organizations, and media) in May 2020, at the peak of coronavirus-related deaths, and in 2023, when trust levels confidently returned to their usual range.

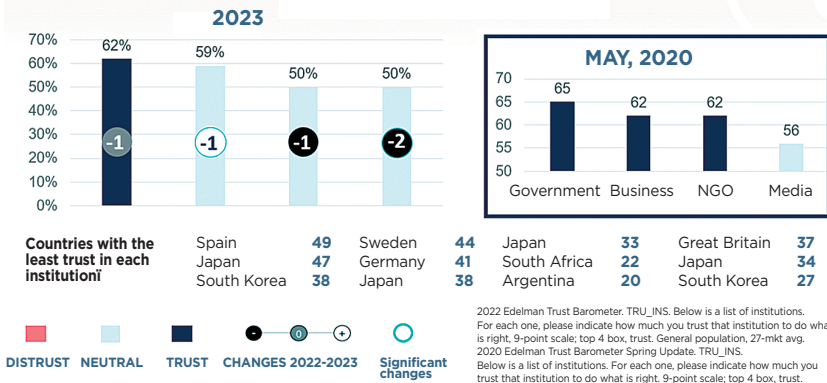
As can be seen below, the Edelman trust survey indicates that in spring 2020, trust in governments reached an unprecedented 65%, and trust in media was 5-6% higher than usual—55%. By 2023, when things returned to a normal state, trust in governments was at 50%, the same as for media.

A similar phenomenon occurred in Ukraine with the onset of the full-scale invasion. Trust in the President and the Armed Forces of Ukraine (AFU) exceeded 90% in 2022. However, over time, trust in the AFU remained the highest, while trust in the President began to gradually decline, falling to just below 72% by autumn 2023. Relevant data is provided by the Razumkov Center in its sociological survey, as shown in the chart below.

Let me remind you that we began analyzing trust as an indicator that during times of great upheaval, people need information that is both timely and valuable. It allows, without exaggeration, for lives to be saved. However, when Russia invaded us with war, the demands for information

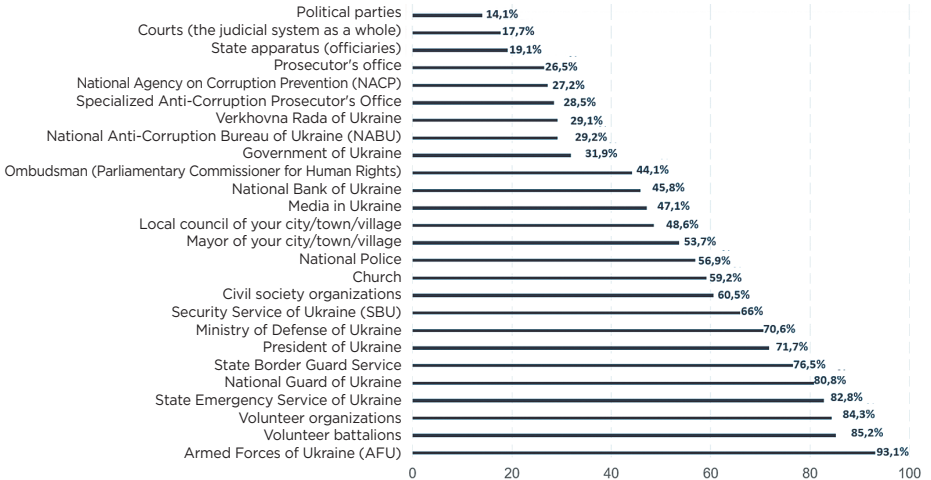
⁴⁵ www.edelman.com/trust/trust-barometer

TRUST IN THE MEDIA. WORLD



2022 Edelman Trust Barometer. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right, 9-point scale; top 4 box, trust. General population, 27-mkt avg. 2020 Edelman Trust Barometer Spring Update. TRU_INS. Below is a list of institutions. For each one, please indicate how much you trust that institution to do what is right, 9-point scale; top 4 box, trust. General population, 11-mkt avg.

TRUST IN INSTITUTIONS



Source: Results of a sociological survey conducted by the Sociological Service of the Razumkov Center from September 21 to 27, 2023, within the framework of the "Engage!" Program, funded by the United States Agency for International Development (USAID) and implemented by Pact in Ukraine.

that became important to people, and which they could trust, changed. In other words, in addition to changes in consumption caused by the large displacement of people and changes in access to familiar types of media due to relocation and issues with access to electricity and the internet, there were also changes in the requirements for the information that people needed most. The criteria by which individuals decide whether they are willing to continue trusting a particular media outlet, journalist, expert, or source of information have also changed.

In response to these shifts in audience demand, media and journalists have also adapted their work.

Professionalism and Ethics – The Demands of Our Time

The analysis of decisions and recommendations prepared and disseminated by the Commission on Journalism Ethics in 2022 provides insight into the knowledge and understandings that both journalists and audiences lacked at the beginning of the war. A vivid example is the complaint regarding the quotation on the air of one television channel of the well-known phrase about the Russian military ship. At that time, the Commission explained that the author of the phrase intended to convey direction, rather than anything else. Therefore, in addition to explaining how journalists should handle quotations, ensure accurate transmission of information, and avoid excessive emphasis, the Commission also provided recommendations on the correct spelling of the word that indicates direction, rather than anything else.

In 2022, the Commission on Journalism Ethics also provided explanations and recommendations regarding information that cannot be disclosed in the media during a state of war, the wartime lexicon, reporting on the deaths of individuals during the war, the use of stylistically colored language, interviews with Russian prisoners of war in Ukrainian media, and many other topics. Overall, from March to December 2022, 13 recommendations, clarifications, and statements were prepared and published. The Strategic Communications Department of the Office of the Commander-in-Chief of the Armed Forces of Ukraine recommended adhering to ethical standards in journalism when preparing journalistic materials about the activities of the Armed Forces of Ukraine (practical recommendations from the Commission on Journalism Ethics provided after the onset of full-scale Russian aggression⁴⁶).

⁴⁶ <https://cje.org.ua/library/posibnyk-z-zhurnalistskoi-etyky/>

Thus, the large-scale war has changed both the lexicon of Ukrainian media and approaches to news coverage, as well as the requirements for working with sources of information. In addition to the requirements of the Code of Ethics concerning the presentation of complete information and, for example, covering the positions of both sides in a conflict situation, new demands have emerged, such as avoiding re-traumatization, ensuring safety, and preventing the provision of media space to representatives of the aggressor state.

This has led to a clear and significant contribution from the media to the life and safety of people, initially through informing the public and subsequently assisting in finding solutions to many pressing issues. These range from problems arising as a result of the war—such as housing restoration, the integration of internally displaced persons into communities, psychological support, and so on—to long-standing issues that have remained unresolved for many years but finally need to be addressed (homeless animals, unemployment, waste management, etc.).

Usefulness: A New Important Focus for Media

Well, how new is it? Not entirely new, of course, because focusing on the needs of the audience has always been the foundation of media work and editorial planning of its topics. However, it seems that for a certain period, entertainment content garnered too much attention from media outlets. Moreover, «rating-driven planning,» where editorial teams focused on content that garnered more reach, led to distrust at a time when people needed information crucial for survival.

Thus, it appears that those who are useful to their audiences are currently the winners—and we can see this in the rapid increase in attention to information in local newspapers. An analysis of the experience of the Ukrainian Media Business Association (UMBA) in assisting local media outlets in 2022-2024 suggests that those local media outlets which directed their work towards addressing the urgent issues of communities and individual residents have had—and continue to have—increasing audience numbers. Of course, the most significant growth is happening in the digital space—on social media and websites. Importantly, the number of printed copies sold is also rising—both through subscriptions and retail. This specifically applies to publications that are making efforts to be useful to their audiences.

However, given the conditions where the war and the reform of the national postal operator, «Ukrposhta,» have led to disruptions in timely delivery of subscriptions, resulting in cancellations, the efforts of editorial teams and the increased value of local publications for residents are of utmost importance for the editorial teams themselves. This is a situation where everyone stands to gain.

People receive answers to their questions, assistance, and solutions to community problems. Local authorities see how the professional work of media enables the engagement of both residents and entrepreneurs in the joint search for and resolution of issues, how honest discussions and subsequent collective efforts help find solutions even for longstanding problems that have remained unsolved due to a lack of vision on how to address them. The methods known to those responsible for solving these problems had long been tried and failed to yield results.

Media also benefit from this, as both the public and authorities, as well as entrepreneurs, recognize the tangible effectiveness of the editorial team's efforts. Problems start getting solved; people may not yet be expressing gratitude, but at least they are reducing criticism in discussions, moving towards more balanced analysis and problem-solving. Accordingly, it becomes both interesting and beneficial for everyone to involve media in addressing new challenges. And where there is collaboration, there is profit for media.

To support this, I will quote just one statement. In my opinion, it is very indicative—not unique, but particularly telling—because it simply conveys what is happening today in many communities where local media strive to make their work contribute to solving problems.

«Our materials and the issues they raise help the community move forward while listening to the opinions of people, encouraging the authorities to implement not only their own vision but also to heed criticism and the views of residents. We can already say that people have gained more opportunities for interaction with local authorities through our surveys, the results of which we communicate to community leaders as needed. Statistics confirm this—there is an increase in the number of views of materials prepared specifically within the project.» This is stated by Natalia Shutko, director of «Nash Kraj» («Our Region») newspaper, which operates in the Lypova Dolyna community, Sumy region, in her article for the «Editors' Portal.»⁴⁷

⁴⁷ <https://redactor.in.ua/2024/07/04/tradyczijni-czinnosti-dovira-domiszczewogo-media-cze-v-pershu-chergu-czinnist-informacziyi/>

By the way, after analyzing the experiences and real results of 55 editorial teams that carried out their projects with financial support from the EU Delegation to Ukraine, UMBA notes the high effectiveness of focusing on community needs. On average, within 3-4 months of work, one editorial team helped resolve five problems of varying levels. Each or almost every one of these issues would have remained unresolved if the editorial teams had not made efforts to organize discussions in communities, to collaboratively search for not only solutions but also for ways each individual can help and participate. The value of the publications that the editorial teams used, among other measures, as an important tool for achieving their goals is confirmed by another statistic. The average increase in audiences and reach for media during the implementation of their projects amounted to 32%.



We in Ukrainian Association of Media Business(AUMB) are pleased that our media assistance, which we have been systematically providing for over five years, focusing local media outlets on being beneficial for their communities, is receiving appropriate recognition. To put it plainly,

editorial teams highly value what we do in helping them utilize donor funds both to address community issues and to enhance their own effectiveness.

The research titled «Donor Field of Media Support in Ukraine: State, Opportunities, Needs, Problems, Priorities, and Prospects,» conducted by the Lviv Media Forum team from October 2023 to February 2024 with financial support from International Media Support, confirmed that UAMB is among the top 15 organizations that editorial teams identified as having provided the most assistance over the past two years.

Donor organizations that, according to the media surveyed, have been providing them with assistance over the past two years (without specifying the chronological boundaries):	How many editorial teams mentioned them?
Internews in Ukraine (Internews Network, «Internews» without specification)*	29
Lviv Media Forum**	21
Institute of Mass Information	18
«Internews-Ukraine»	17
European Endowment for Democracy	14
Media Development Foundation	12
IREX	12
International Renaissance Foundation	11
National Endowment for Democracy	10
U.S. Embassy in Ukraine	10
USAID	9
German Marshall Fund	8
Deutsche Welle Academy	7
Media in Cooperation and Transition (MICT)	7
Ukrainian Association of Media Business	7
Institute for War and Peace Reporting	7
EU4 Independent Media	5
Public Interest Journalism Lab	5
Prague Civil Society Centre	5

Thomson Reuters Foundation	4
European Centre for Press and Media Freedom (ECPMF)	4
Institute for Regional Press Development	4
ICAP «Ednannia»	4
Solidarity Fund PL	4
UCBI	3
Institute of Regional Press and Information (IPMI)	3
The Fix Foundation	3
n-ost	3
International Press Institute	3
National Media Association	2

URL: https://drive.google.com/file/d/1j8VREj6l4UKI-_xFrsc4LfSot2W_RZp8/view?fbclid=IwZXh0bgNhZWOCMTAAAR1q9w78UJEwJsdjiSi9ESH9Vpz-8bQuDcxuAjZ3xthEIWb1DGwUhlXvoit8_aem_AdAlmuE0k_mxAgTCI7Llya-To5lpVOW3ikuSswx1rngL5SXeChZlt8Zltk2SXjrb_yleTOZZPuUrhpijMyMx-RihQk

The research from the Lviv Media Forum team also highlights three important conclusions:

Working on projects helps media increase their own effectiveness. Ninety-six percent of the surveyed media changed something in their operations as a result of or during collaboration with donors.

Donor assistance is a way to survive during the difficult times of war. Media outlets often seek grants due to financial hardship and a lack of other sources of income. Eighty-seven percent of the surveyed media reported that grants helped them resolve serious issues.

Editors of local media need quality mentorship. They indicated that they are interested in receiving explanations from donors regarding why their project proposals were not supported, so they can address mistakes in applications and have better chances of success in grant competitions.

Considering the analyzed data, it is interesting to revisit the question of the declining viewership of the «Unified News» telethon. It is likely that the audience's need for materials that help people find solutions to their problems may be one of the reasons for the decreasing attention to the telethon.

The «Unified News» telethon – its role and dynamics

However, it is still too early to dismiss television news from analysis. It seems that the prevailing opinion is that the «Unified News» information marathon played an extraordinarily important role during the first year of full-scale war. But now, another view regarding the telethon appears to be more widespread, and it is worth examining this through the lens of analysis and trends while keeping in mind the points we discussed earlier.

The editor-in-chief of the «Babel» publication, Kateryna Kobernyk, in her article titled «‘Suspilne’ steps away from the telethon, but not entirely. The larger story of conflict in the news called unified» analyzes managerial and marketing considerations, providing a wealth of important information that helps understand the management aspect of why the telethon is currently as it is. The material⁴⁸ is certainly worth your attention, and it is inappropriate to summarize it here. However, three key theses from it are essential to incorporate into our analysis. The quotes that follow are from Kateryna Kobernyk’s material.

1. Trust in the telethon is currently low. «Since 2022, trust in Unified News has declined, along with the audience share watching the telethon at any given moment. This refers to people over the age of four in cities with populations exceeding 50,000. If two years ago, according to KIIS data⁴⁹, nearly 70% trusted the telethon, by December 2023, this figure fell to 43%. The share compared to spring 2022 has dropped approximately threefold – to 10%.»
2. Participants in the telethon are making efforts to produce quality content and adhere to established restrictions. «In debates about television ratings, the main argument of ‘Suspilne’ is that they create a quality product that no one influences, neither the state nor the channel owners, because the owner is society. Commercial channels also assert that they do not face censorship from the authorities. However, there are, for example, preferred and non-preferred experts.»
3. The quality of the television product varies across different slots of the telethon and depends on the journalistic team. This, in turn, relates to

⁴⁸ <https://babel.ua/texts/106818-suspilne-vihodit-z-telemarafonu-ale-ne-zovsim-velika-istoriya-konfliktu-v-novinah-yaki-nazivayut-yedinimi>

⁴⁹ <https://www.kiis.com.ua/?lang=ukr&cat=reports&id=1347&page=1>

funding. «If the news costs 250–350 million hryvnias a year, the state covers about half. How to cover the deficit has been a long-standing consideration for commercial channels. Occasionally, they discuss selling advertising in the telethon. ‘Suspilne,’ as Chernotytskyi states, would also not be against it if it concerns legitimate companies and not, say, gambling. However, the ‘partners’ made it clear that they do not wish to share future revenues. The main argument is that due to the war, they have reduced a significant portion of their staff, cut production, several holdings have effectively lost investors, and the state already covers everything for ‘Suspilne.’

And now, let’s briefly return to the trends in information consumption through various channels. After all, management is one thing, but it is the viewer, that is, the audience, who ‘votes with their buttons.’ Just like trust, reach is one of the most important characteristics and/or indicators of the necessity of a particular media outlet, channel, or project in the eyes of the people.

The previously cited research, ‘Ukrainian Media, Attitudes, and Trust in 2023,’ conducted by InMind on behalf of the international organization Internews, which implements the ‘Media Program in Ukraine’ project with financial support from the United States Agency for International Development (USAID), showed that in 2023, news consumption across almost all types of media remained at last year’s level, except for television consumption, which continues to decline.

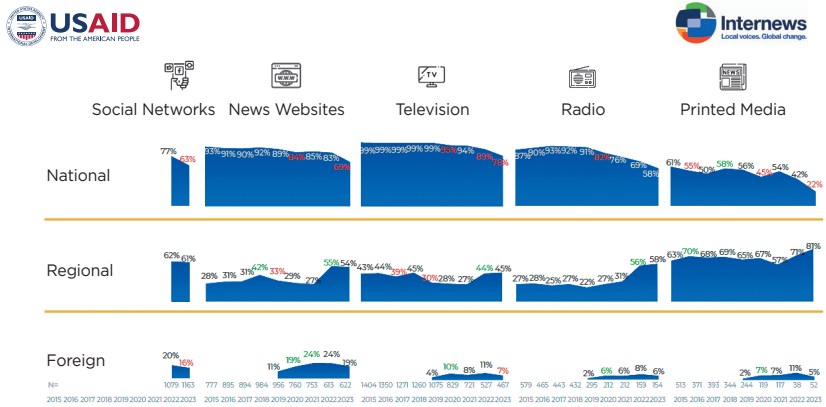
Researchers note: ‘47% of Ukrainians use several sources for news. Those who rely on only one source generally prefer social networks. Unlike at the beginning of the war, when respondents followed the news 24/7, there is now a significant decrease in the frequency of news consumption. Respondents are gradually returning to everyday concerns related to their personal lives and the jobs they lost at the beginning of the war. The situation at the front has more or less stabilized, and there is confidence that «Ukraine will win.»

Television remains one of the primary devices for news consumption among older Ukrainians, although this age group is also showing a gradual increase in the consumption of Telegram channels. Middle-aged respondents consume news on television situationally (during breakfast, lunch, in the evening, or on weekends). Younger respondents either do not have a television at all or use it very rarely.

From the chart below, it can be seen that over the last three years—from 2021 to 2023—news consumption across all national channels has

decreased without exception. This includes social media and the internet. In contrast, the demand for regional/local news has increased. Everywhere, except for social media, according to the data from this chart (the reason for this is the large amount of misinformation specifically on social media, which readers are able to recognize, leading them to unsubscribe from such sources). The most significant growth—by a factor of two—was observed in websites and radio.

Dynamics of consumption of different types of media. 2015-2023



Question:

Which news pages/channels on social media did you visit in the last 30 days?
(FOR WEBSITES/INTERNET SOURCES, TV, RADIO, AND PRINT MEDIA - SIMILAR QUESTION)

Base:

News consumers of this media

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

Researchers provide the following comments in this regard: “Today, on average, respondents spend 2-3 hours a day consuming news. Before the war, respondents generally showed little interest in news, dedicating very little time to it, as most of their time was occupied by entertainment content. After the full-scale invasion, Ukrainians completely switched to consuming information about the war from various sources.

Now, with the war ongoing for over a year and a half, there is a growing habituation to news about the war; respondents react more calmly

to tragic events. Most have reduced their consumption of war-related news, showing a more selective approach to information and a rejection of sources that duplicate information (“I no longer read everything indiscriminately, as I used to; I filter the news now”).

Respondents also note that during the war, the amount of disinformation in the media space has increased (most notably on Telegram channels), which has led the audience to unsubscribe from such sources of misinformation. Additionally, respondents have begun to return to content that, according to them, helps distract from negative news.

However, interest in news remains at a fairly high level compared to the pre-war period. The quality of information provided is generally rated well by respondents, although most note that the information is censored by all media. At the same time, such restrictions are perceived with understanding, as respondents believe they are necessary to avoid aiding the enemy and to prevent panic among the civilian population.”

The Bottom Line

What the war has taught all of us is to remain in a constant “tone,” which has additional significance for the media. Without touching on the economic side of media operations during large-scale war, the primary changes involve approaches to working with information. Audiences today need something different. A carefree life and entertainment content are now a thing of the past—helping the armed forces (UAF) and internally displaced persons (IDPs) have come to the forefront. Materials that merely “inform” have shifted to social networks, while professional media are expected to provide assistance, explanations, and organizational initiatives. The “Unified News” marathon, which played an extraordinarily important role in the first year of the war, today clearly does not meet audience needs, prompting people to seek various explanations for why it is still needed in its current form and why it is being funded.

Times have changed, people’s needs have changed, and so have the media.

In communities in de-occupied territories and those close to the front line, the lives and needs of people are not the same as in rear communities. Yet, life exists in both places, and the role of the media is both important and unique. The war has deepened the differentiation of needs and added new aspects to audience structuring. This process is ongoing

and will continue. The needs of IDPs are increasingly accompanied by the needs for the rehabilitation of soldiers and psychological support for families of the deceased; communities need to address pressing issues of recovery, mine clearance, employment, and the integration of IDPs. This must be done in addition to addressing previously existing issues such as waste management, sterilization of stray animals, road repairs, clearing water sources, and so on.

Our resources are limited, and the number of urgent issues will not decrease, which is why the media—especially local media—can and must play a new and extremely important role as local centers of effective communication. Journalists and editors need to learn to focus their work on handling information, engaging with experts and sources in ways that help the community see new opportunities, learn from others' experiences, and understand what is not working, and so forth. Problems are often not resolved not because they cannot be solved, but because those responsible for resolving them have exhausted their arsenal of ideas. Therefore, it is the media and others (with the help of the media) who can and should contribute their efforts, seek, and provide new ideas and information about new possibilities. This is the path to problem-solving, community development, and improving the lives of residents. And this is what makes us a strong nation—united and invincible.

Sergiy Chernyavskiy,
Media Expert (Ukraine)

PRINTED MEDIA IN UKRAINE

The number of printed media in Ukraine from January 1, 2008, to January 1, 2024

From 1991 to 2023, over 45,000 titles of newspapers and magazines were registered in Ukraine. This is related to several changes in the state bodies that acted as registrars for newspapers and magazines. In fact, there was no procedure for closing printed media, except for voluntary closure by the founder.

At the beginning of 2008, more than 30,000 titles of newspapers and magazines were registered.

According to research in 2008, approximately 4,200 titles of newspapers and magazines were published, excluding corporate publications and publications from higher education institutions.

The printed media market was excessively «overheated» in terms of the number of newspapers and magazines compared to the printed media market in EU countries. From 2008 to 2024, more than 3,000 printed media outlets ceased publication in Ukraine. As of January 1, 2024, there were 1,174 printed media outlets in Ukraine, excluding corporate publications and publications from higher education institutions.

The registration of printed media in Ukraine is conducted by the state body - the National Council on Television and Radio Broadcasting. As of August 1, 2024, the National Council, according to the Law of Ukraine «On Media,» registered:

- Newspapers - 1,361
- Magazines - 1,519
- Other printed media - 637

The total number is 3,157 entities in the field of printed media.

This is the largest number of registered and existing entities in the media sector among all types of media in Ukraine (audiovisual media, online media, and others) according to the Law of Ukraine «On Media.»

The difference of more than two times between the number of printed media registered by the National Council and the number of printed media in the research is related to several reasons:

- The 1,174 printed media do not include corporate publications and publications from higher education institutions.

- More than one hundred publishers have multiple registration certificates for one newspaper. This is necessary for inclusion in local subscription catalogs for Ukrposhta as a local publication. For example, the publisher of the newspaper «Express» may have eight registration certificates for a newspaper with the same content: Express Lviv, Express Zakarpattia, Express Khmelnytskyi, Express Ternopil, Express Rivne Region, Express Ivano-Frankivsk, Express Volyn Region, and Express. The newspaper «Advisor of the Householder» has nine registration certificates: Advisor of the Householder + Advisor of the Householder (Lviv, Volyn, Zakarpattia, Ivano-Frankivsk, Rivne, Ternopil, Khmelnytskyi, Chernivtsi).
- Publishers registered free publications that had ceased publication earlier and do not currently plan to resume. Until March 31, 2024, there was free re-registration for publishers who had printed media operating based on certificates obtained from the Ministry of Justice.
- Publishers registered to obtain journalist credentials and permits for firearm possession.
- Other minor variations.

The process of registering and re-registering publications that were already on the market followed the new Law of Ukraine «On Media,» which came into effect in 2023.

Print media	01.01.2008	01.01.2020	01.01.2022	01.01.2024
Newspapers	2 448	1 580	1 354	809
Magazines	1 739	889	662	365
Total:	4 187	2 469	2 016	1 174

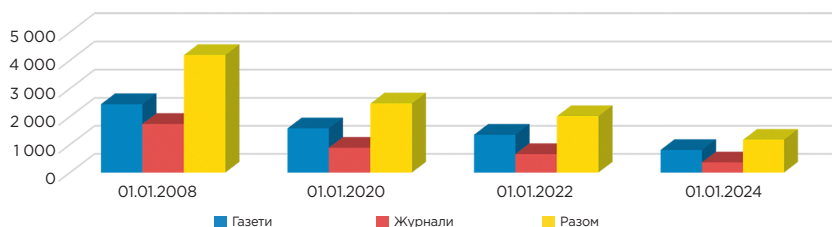
Дані: Desk research

After the invasion in 2022, until the beginning of 2024, out of more than two thousand print media, more than 400 names of newspapers and magazines - more than 100 names of magazines and more than 300 names of newspapers - did not resume publication for various reasons. Taking into account the 349 publications that Ukraine lost due to the occupation of Donetsk and Luhansk regions and the annexation of the Autonomous Republic of Crimea, the total number of newspapers and magazines is more than 750, after the start of the war in 2014.

Print media	2020	2022	2024
National newspapers and magazines	1510	1180	718
Regional newspapers and magazines	34	11	7
Local (regional, city, district newspapers and magazines)	925	825	449
Total:	2469	2016	1174

Data: Desk research

Printed media



Number of newspapers in Ukraine

Newspapers	2020	2022	2024
National	633	528	356
Regional	32	10	7
Local (regional, city and district)	915	816	446
Total:	1580	1354	809

Data: Desk research

Number of magazines in Ukraine

Magazines	2020	2022	2024
National	877	652	362
Regional	2	1	0
Local/local (regional, city and district)	10	9	3
Total:	889	662	365

Data: Desk research

Local newspapers and magazines - number 2020, 2022 and 2024

	Region/Year	2020	2022	2024	2024/2022
1	Volyn Region	49	39	33	84,62%
2	Волинська область	45	45	40	88,89%
3	Dnipropetrovsk Region	66	45	21	46,67%
4	Donetsk Region	35	27	2	7,41%
5	Zhytomyr Region	37	37	22	59,46%
6	Zakarpattia Region	23	20	14	70,00%
7	Zaporizhzhia Region	55	52	5	9,62%
8	Ivano-Frankivsk Region	35	29	14	48,28%
9	Kyiv Region/Kyiv	38	31	13	41,94%
10	Kirovohrad Region	43	41	28	68,29%
11	Lviv Region	40	32	26	81,25%
12	Luhansk Region	17	16	0	0,00%
13	Mykolaiv Region	39	31	11	35,48%
14	Odesa Region	63	51	20	39,22%
15	Poltava Region	49	47	33	70,21%
16	Rivne Region	35	29	21	72,41%
17	Sumy Region	40	33	22	66,67%
18	Ternopil Region	25	25	14	56,00%
19	Kharkiv Region	52	48	15	31,25%
20	Kherson Region	27	26	2	7,69%
21	Khmelnyskyi Region	35	31	26	83,87%
22	Cherkasy Region	48	44	30	68,18%
23	Chernihiv Region	41	39	28	71,79%
24	Chernivtsi Region	22	18	16	88,89%
	Total:	959	836	456	54,55%

Data: Desk research

The last column is how many local/local publications are left in 2024 as a percentage, compared to before the Russian invasion in 2022. Compared to 2022, the total number of local publications has almost halved - by 45.45%

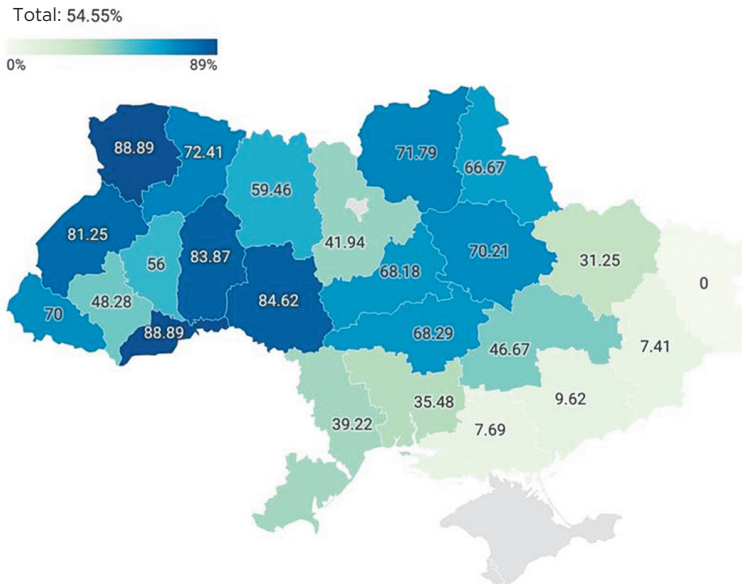
Ten oblasts suffered the most: Luhansk oblast - no local publications left, Donetsk and Kherson oblasts - less than 8% of local publications remained, Zaporizhzhia oblast - less than 10% of local publications remained.

In the Kharkiv, Mykolaiv and Odesa regions, less than 40% of local publications remain.

In Dnipropetrovsk, Kyiv and Ivano-Frankivsk regions, less than 50% of local publications remain.

The decrease in the number of local media in the Ivano-Frankivsk region may indicate unsatisfactory work of Ukrposhta.

Local editions, ratio 2024/2022



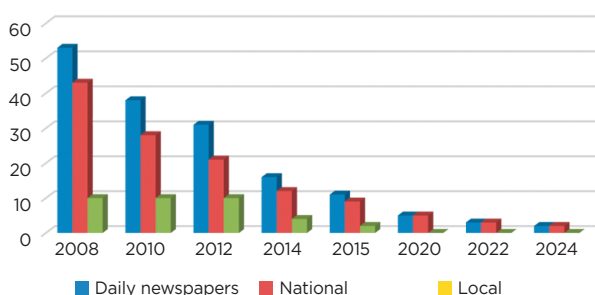
Created with Datawrapper

Daily newspapers in Ukraine

Print media	2008	2010	2012	2014	2015	2020	2022	2024
Daily newspapers	53	38	31	16	11	5	3	2
National	43	28	21	12	9	5	3	2
local	10	10	10	4	2	0	0	0

Data: Desk research

Print media



Daily newspapers are newspapers published at least four times a week.

The impact of the war on print media

After the annexation of the Autonomous Republic of Crimea, the occupation of parts of the Luhansk and Donetsk regions in 2014, 349 publications stopped being published.

After the invasion in 2022, by the beginning of 2024, more than 400 titles of newspapers and magazines, out of more than two thousand print media, did not resume publication for various reasons. More than 100 magazines and more than 300 titles, of which 96 editions were in Donetsk, Kherson and Zaporizhzhia regions.

Out of 104 publications published in the temporarily occupied territory of Luhansk, Donetsk and Kherson regions after the invasion of Russia in 2022, 43 publications continued to be published with the same name as before the occupation. Information on this issue in the Autonomous Republic of Crimea and Zaporizhzhia Region is currently being processed.

The number of publications that stopped being published due to the temporary occupation of part of the territory of Ukraine

	Crimea	Donetsk region	Luhansk region	Sevastopol	Kherson region	Zaporizhia region	Total, editions
2014	46	181	117	5			349
2022	0	27	16	0	26	52	121
2024	0	2	0	0	2	5	9
Total	46	179	117	5	24	47	418
Of them, after 2022		25			24	47	96

Basic data of the «Study of the needs of local newspapers in the de-occupied and front-line territories», which was conducted in 2023

National Union of Journalists of Ukraine. 30 newspapers from 10 front-line territories were interviewed.

- 90% of newspapers participating in the study resumed publication as of the time it was conducted (end of March - beginning of April 2023)
- 60% of editorial offices do not have enough funds to pay salaries and pay taxes
- 40% of newspapers were not published for less than 3 months
- The average duration of a forced break in the publication of a newspaper is 6 months
- Every second printed edition reduced the frequency of publication by 2-4 times
- The average number of columns in newspapers, except for one editorial office, was reduced by 50%
- The number of workers decreased in 80% of editorial offices
- In 25% of editorial offices, 1-2 people work on creating a newspaper

Formation of the revenue structure of print media in Ukraine: advertising, subscription, retail sales in 2020, 2022, 2024

Revenues, UAH million/year	2010	2019	2020	2022	2024
Advertising, UAH million	2 485	1 850	1 466	342	375
Retail, UAH million	1 546	640	625	373	277
Prepayment, UAH million	3 190	627	449	281	101
Total, UAH million	7 221	3 117	2 540	996	753
Total, million	903	132	92	27	18

- Advertising – according to the data of the All-Ukrainian Advertising Coalition. The largest percentage of revenues from advertising falls on top-5 national magazines in terms of advertising. Regional newspapers account for less than 15% of the total volume of advertising
- Income from the retail trade of printed media takes into account sales in supermarkets, stationary branches of Ukrposhta and other places of press sales. Excludes return/chargeback quantity and print media seller's trade mark.
- Income from subscription according to the publisher's value, excluding income from Ukrposhta delivery

Press revenues, %/year	2010	2019	2020	2022	2024
Advertising	34,41%	59,36%	57,71%	34,35%	49,83%
Retail	21,41%	20,54%	24,60%	37,47%	36,74%
Subscription	44,18%	20,10%	17,69%	28,18%	13,42%
Total:	100,00%	100,00%	100,00%	100,00%	100,00%

In 2019, the elections of the President of Ukraine and deputies of the Verkhovna Rada of Ukraine were held. Therefore, there was an increase in political advertising at the expense of political parties. So in 2019, the share of advertising revenue increased.

The reasons for the decline in the income of printed mass media in Ukraine: advertising, subscription and retail sales

In 2022, after the Russian invasion of Ukraine, advertising revenues fell sharply, and therefore the shares of subscription and retail press sales increased.

The forecast for 2024, built taking into account the growth of advertising revenues in the national press, in magazines and in specialized publications. In total, the volume of advertising in the press is expected to grow by 5% in 2024.

But for most regional newspapers, the increase in advertising revenue may not happen.

The drop in income from newspaper publishers' subscriptions is due to a reduction in overpayments and a significant increase in the cost of Ukrposhta's services. In order not to lose subscribers, some publishers were forced to increase the cost of subscription only by a percentage due to the increase in printing and paper costs.

It is worth noting that the income of Ukrposhta is more than 50% of the cost of the subscription edition.

Magazines and newspapers	2019	2020	2022	2024
National press, UAH million	1 106	866	221	247
including sponsorship, UAH million	284	215	56	59
Regional press, UAH million	320	243	51	54
Specialized press, UAH million	425	357	70	75
Advertising in the press, total, UAH million	1 850	1 466	342	375

According to the data from the All-Ukrainian Advertising Coalition.

Reasons for the Decline in Advertising Revenue:

- The full-scale invasion of Russia into the territory of Ukraine on February 24, 2022.
- The reduction of small and medium-sized businesses due to relocation abroad.
- The absence of circulation certification, which confirms the compliance of print runs and the sale of publications by subscription and

retail. As a result, part of the advertising campaigns became ineffective for advertisers. Circulation certification was discontinued in 2006, and it was planned to resume in 2009, but this did not happen.

- High resource costs for clients and advertising agencies when placing ads in regional press. Despite lower cost per contact with the target audience (CPT) compared to other media, the workload for placing ads is greater. For example, placing ads in 25 regional newspapers requires:
 - Adapting the advertising layout to different modular grids in regional newspapers.
 - Receiving invoices from 25 different editorial offices.
 - Paying invoices from 25 different editorial offices.
 - Obtaining placement reports – a copy of the newspaper with the client’s ad from 25 different editorial offices.
 - Sending completed work reports to 25 different editorial offices.
 - Receiving completed work reports from 25 different editorial offices.
- Weak PR for the industry among advertisers and the lack of campaigns promoting the press as an effective advertising medium.
- Redistribution of advertising budgets towards online media and Telegram channels, partly due to a generation of advertisers who no longer read newspapers.
- Lack of a legislative framework for online advertising. Currently, alcoholic brands and gambling (casino and gaming ads) are being advertised in online media and Telegram channels.

Reasons for the Decline in Subscription Revenue:

- The sole national postal operator for the delivery of printed media by subscription (Ukrposhta) systematically reduced the quality of press delivery from 2017 to 2024.
- Increased delivery times for daily and weekly newspapers. This led to the cessation of private daily newspaper publication in Ukraine.

- Reduction in the number of post offices where one can subscribe to a newspaper:
 - In 2023, according to Ukrposhta’s report, the number of stationary post offices was 4,698.
 - In 2018, the number of stationary post offices was 10,475.
- In 2018, most post offices operated a full workweek with one day off, whereas now most rural post offices operate 1-2 days a week.
- Non-compliance with delivery schedules by mobile post offices.
- Reduction in the number of postal workers and communication operators by nearly 75% over seven years: In 2017, the number of postal workers according to Ukrposhta’s reports was 31,200. As of the first quarter of 2024, there are 7,974 postal workers.
- Lack of penalties in contracts with publishers for the untimely delivery of publications by Ukrposhta to subscribers’ mailing addresses.
- Decrease in the number of people accustomed to subscribing to newspapers and magazines, linked to emigration abroad in 2022 due to the full-scale invasion of Russia.
- Increase in internet users among the 60+ demographic.
- Decline in income among the audience (primarily pensioners) accustomed to reading the press.
- Rise in subscription prices for newspapers and magazines due to increased delivery tariffs from Ukrposhta and the cost of subscription processing for readers. Since 2018, Ukrposhta’s tariff increases for subscribers to printed media have significantly exceeded the growth of the minimum wage and fuel prices. The cost of delivery has risen higher than the production cost of the publication itself.
- Broken or absent mailboxes at subscribers.
- Lack of discounts from Ukrposhta for subscriptions through editorial offices, known as editorial subscriptions.
- Lack of discounts for subscriptions on Ukrposhta’s website.
- Ukrposhta has ceased to accept discounted subscriptions for pensioners and combat veterans, canceling the preferential indices for newspaper and magazine subscriptions in the subscription catalog and on the website.

Reasons for the Decline in Retail Sales Revenue

- Reduction in the Number of Press Sales Points:
 - Compared to 2010, the number of press sales points has decreased by almost 70%.
 - In 2010, there were between 6,500 and 7,000 press sales points, including supermarkets, whereas now there are fewer than 2,000 (excluding stationary branches of Ukrposhta and supermarkets).
 - Kiosks and street locations that previously sold press have been purchased by companies selling tobacco products. For example, in 2019, the former kiosk network «Military mail» (in Dnipro) ceased selling press and now only sells tobacco products. In Kyiv, fewer than 350 out of nearly 1,000 press sales points remain.
- Increase in Markup on Newspapers and Magazines:
 - The markup on newspapers in the sales network has significantly increased. In 2010, the markup ranged from 40% to 60%, but now it exceeds 100%.
- Decrease in Sales of Local and National Press in Major Supermarket Chains.
- Reduction in the Reading Audience:
 - There has been a decrease in the audience accustomed to reading newspapers due to the demographic situation.
- Reduction in Working Days at Postal Offices:
 - This has decreased the duration of press sales.
- Closure of Stationary Ukrposhta Branches:
 - This has further reduced the points of sale for press, excluding supermarkets and Ukrposhta branches.

Year	2008	2012	2020	2022	2024
Places of sale of the press	8160	7340	2800	1800	1300

Newsprint in Ukraine

In 2012, the owner of the OJSC»Zhydachiv Pulp and Paper Mill» (Zhydachiv, Lviv region) decided to stop producing newsprint, which accounted for up to 30% of Ukraine's needs. Therefore, since 2013, over 90% of newsprint has been imported from Russia, with over 8% coming from the Republic of Belarus.

Distribution of Newsprint Imports as of December 2019

In 2022 and 2023, newsprint previously sourced from Russia was purchased from Slovenia, Germany, Switzerland, Poland, and Finland. Within three months, Ukrainian press transitioned from relying on Russian newsprint to printing on paper from European manufacturers.

In the first three quarters of 2022, the price of paper from European producers reached up to \$1,500 per ton, but by the fourth quarter of 2022, the price decreased to \$950-980 per ton. Additionally, with the support of international funds and organizations, printed media in Ukraine received over 200 tons of newsprint in 2022 and 2023.

Year	Price	Tons
2013	532-540	123 659
2014	522-536	93 298
2015	395-525	72 496
2016	399-425	45 599
2017	410-450	51 089
2018	430-750	36 751
2019	560-660	32 269
2020	320-450	28 136
2021	520-610	26 348
2022 (4 quarter)	950-980	No data
2023	580-620	7 650
Forecast 2024	600-650	7 400

Data: RT Group until 2021. From 2021: Desk research.
The specified price is ex-factory before taxes

Research: «Media consumption of Ukrainians: the third year of full-scale war».

The study was commissioned by the OPORA Civic Network. Data from 2022 to 2024 inclusive.

Survey method: Telephone interview. Population: Institutional population according to KMIS studies - 28.1 million.

Media consumption period: two months. Age: 18+, adult population of Ukraine. Territory: all of Ukraine*. Number of respondents: 2011 interviews with a sample representing the adult population of Ukraine.

*with the exception of residents of territories temporarily not controlled by the Ukrainian authorities until February 24, 2022, as well as citizens who left abroad with the beginning of the full-scale invasion of Russia.

Quotations from the website of the company that ordered the research: «...Online sources of information are consistently more popular in cities, while television, radio and print media are more popular in villages. However, residents of both cities and villages in 2024 have noticeably lost trust in all sources of information, except for the Internet without social networks...

...All age groups trust printed media the least, but at the same time, the level of trust in them increases with age: the older people are, the more they trust newspapers.»

Sources of information that the survey used to obtain news during the last two months.

Several answer options are possible

Information sources, print mass media	2022	2023	2024
Cities	11,3%	13,4%	12,7%
Villages	13,3%	26,4%	21,5%
In total	11,9%	17,8%	15,7%

Source, print media	Citizens 18+	2022	2023	2024
Cities, million inhabitants	15,854	1,791	2,124	2,013
Villages, million inhabitants	7,341	0,976	1,938	1,578
Total, million inhabitants	23,195	2,767	4,128	3,591

Researcher: KIIS

Which sources of information do the interviewees trust?

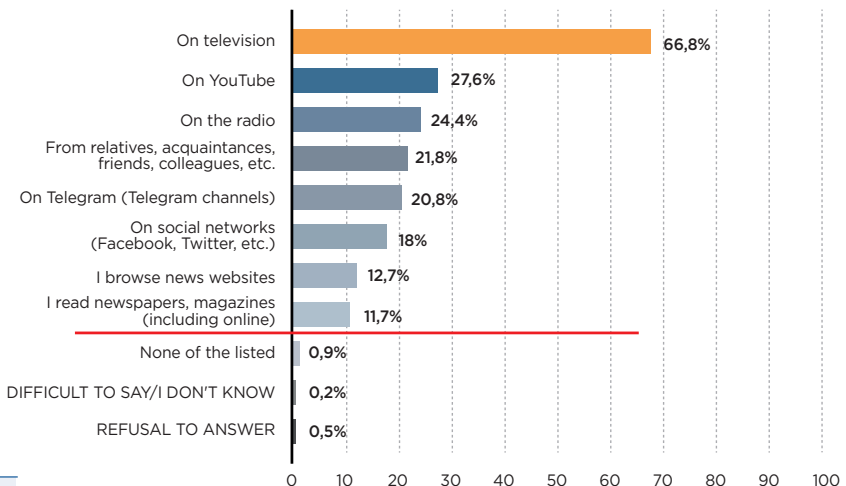
Trust in information in print media		2022	2023	2024
Cities		17,6%	28,0%	19,9%
Villages		18,8%	34,9%	29,0%
In total		18,0%	30,3%	23,0%
Trust, print media	Citizens18+	2022	2023	2024
Cities, million inhabitants	15,854	2,790	4,439	3,154
Villages, million inhabitants	7,341	1,365	2,562	2,128
Total, million inhabitants	23,195	4,155	7,001	5,283

Research: «Media literacy for older people (60+)», Ukrainian Institute of Media and Communication 2023

Chapter 3. page 40, quote: «34.4% of men and 37.8% of women do not use the Internet at all (age 60+). We see a big gap between the city and the countryside in the number of people who do not use the Internet (29.6% in the city and 50.1% in the village). Also, among the 70+ audience, half (50.1%) of the respondents do not use the Internet.»

Page 42: quote: «The readership is significantly higher in rural areas (19.2% against 7.9% in the city) and in the West of the country (19.7% against 13.5% in the Center, 5.1% in South and 5.5% in the East).»

How do you usually get your news? NO MORE THAN 3 OPTIONS



The influence of the national postal operator JSC Ukrposhta on the print media of Ukraine

One of the key threats to print media in Ukraine, after the aggressor country, is the work of the national postal operator Ukrposhta, which issues subscriptions to print media and delivers newspapers and magazines to subscribers.

According to surveys of editors-in-chief from all regions of Ukraine by the National Union of Journalists of Ukraine in 2023 and 2024, the following key problems in the postal delivery of the press were identified.

One of the quantitative indicators of the quality of delivery of subscription editions by Ukrposhta is the disappearance of commercial daily newspapers before the invasion beginning in 2022.

JSC Ukrposhta is a monopolist in the print media subscription market in Ukraine. This has happened since the period when Ukraine declared independence in 1991.

Ukrposhta has the largest network in Ukraine for trade through stationary post offices and the second largest number of employees after Ukrzaliznytsia. However, during the period from 2017 to 2023, inclusive, as a result of the reduction in the number of postmen, operators, employees and stationary post offices, in 2023 Ukrposhta completely lost its leadership position in terms of the number of stationary offices and almost equaled the number of employees compared to its competitor.

The company NOVA (New Post) has 11,400 branches compared to 5,000 branches of Ukrposhta, not counting 15,500 parcel lockers in Nova Poshta. In 2023, Nova Poshta became one of the largest employers in Ukraine having 32 thousand employees.

Comparison of the number of postmen and stationary post offices and the number of one-time circulations for print media subscriptions

Report of Ukrposhta / year	2017	2018	2019	2020	2021	2022	2023	2024*	2023/2019
Postmen, thousand	31,200	30,000	27,700	26,300	25,283	20,531	12,505	7,974	28,79%
Operators, thousand	11,400	11,200	10,970	10,860	10,657	9,133	7,406	7,053	64,29%
Number of employees, thousand	73,000	70,149	64,655	63,327	61,779	53,432	40,024	32,980	51,01%

Inpatient departments	11,000	10,475	10,238	10,238	9,020	7,172	4,698	4,817	54,41%
Mobile departments	дані відсутні		0,601	0,630	1,743	2,451	1,864	1,860	309,48%
One-time circulation at the beginning of the year, million copies	10,16	8,89	7,81	6,67	6,20	5,50	3,10	2,00	25,61%

* According to the author's own sources, the number of stationary post offices of JSC Ukrposhta for the first quarter of 2024 is not 5,570,000, but 4,817,000.

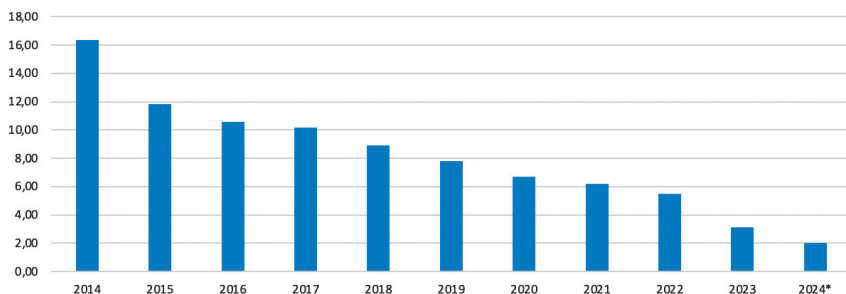
According to public information from JSC Ukrposhta, for the period from 2017 to 2024, the number of postmen decreased by 74.44%, the number of stationary post offices by almost 50%.

The one-time circulation of printed media from 01.01.2017 to 01.01.2024 by subscription decreased by 80.31% or by 8 million 160 thousand copies.

Year	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
One-time circulation (as of January 1), million approx	16,33	11,81	10,57	10,16	8,89	7,81	6,67	6,20	5,50	3,10	2,00

Data: Reports and presentations of Ukrposhta

Single issue circulation (as of January 1), million copies



Therefore, it cannot be considered that the main factor in the decline of subscriptions is the Russia's invasion of Ukraine on February 24, 2022, because before the invasion, from 2017 to 2022, there was already a drop of 8.16 million copies in single print runs for subscriptions.

The reduction in the number of postal workers and the closure of stationary post offices are the two main reasons for the decline in subscriptions.

A third significant reason is the lack of material liability of JSC Ukrposhta for the non-delivery or untimely delivery of subscribed newspapers and magazines.

Reports from JSC Ukrposhta confirm surveys of chief editors and subscribers, and also indicate that the increase in the cost of subscription registration and the delivery of printed media will not affect the overall income structure of JSC Ukrposhta, but will allow for the further reduction of postal workers and stationary post offices.

Options for supporting printed media in Ukraine and why it is important:

- Legally establish the distribution of printed media in supermarkets according to the size of the supermarket. Currently, there are over 4,000 supermarkets in Ukraine, and the press is only present in 1,200 supermarkets. To achieve this, it is necessary to study the experience of Poland and EU countries.
- Registration of international trademarks of publications that simultaneously appear in temporarily occupied territories, to prohibit their use (7th, Pryazovskyi Working).
- Compensation for the costs of increasing the subscription registration and delivery costs in 2025. This could be funded by donors or the state budget. Approximately \$1.1 million, with donors receiving data on the quality of subscription delivery by Ukrposhta.
- Purchase of newsprint for three months for weekly publications for 2025. With a circulation of 1 million per week for 12 pages (36 UAH) = 420 tons of paper, at a cost of \$900 per ton, the expenses would be \$378,000.
- Digitization of archives of printed publications that are published more than once a month.
- Archives accessible to residents of Ukraine abroad and in occupied territories.

- Simultaneous financial assistance to district and city publications of \$1,500 each for 450 publications = \$675,000.
- Assistance to local printed media in creating a standard template for content and layout for local publications.
- Creation of a fund to support local media with a unified center. The single center of the fund will manage reporting on donor funds and will also include layout and the creation of socially significant content for internally displaced persons and residents of Ukraine who have been forced to leave the country during the war.

Thus, the minimum donor support for printed media in Ukraine may amount to up to \$2.5 million in 2025 for the aforementioned areas, excluding the digitization of archives.»

According to the expert report «STATE FINANCIAL SUPPORT FOR LOCAL PRINT MEDIA: COUNCIL OF EUROPE STANDARDS AND EUROPEAN PRACTICES © Council of Europe, September 2021.» A direct quote: «Taking into account the development of Ukrainian media and other local factors, as well as the history of local print media in the country, the most appropriate model of state support for the sector may be either a project financing system or a direct subsidy fund that would offer full support to all local media, or a combination of both approaches...»

Conclusions

Finance

From 2020 to 2024, the number of employees in print media decreased by 75%, or by 42,000 employees. The two main reasons for staff reductions and publication closures are the war in Ukraine and the quality of services provided by the State Enterprise Ukrposhta in terms of subscriptions and retail sales.

Donor support, which was primarily distributed among print media by three public organizations—UMBA, NUJU, and IRPU—and separately through a program from the Ministry of Culture and Strategic Communications, was received by up to 200 titles of newspapers and magazines. Currently, this represents less than 20% of the total number of publications. This is insufficient to prevent the closure of local newspapers in Ukraine.

The full volume of financial assistance to print media from Western partners and the state budget of Ukraine for 2022 and 2023 is unknown.

Editorial responsibilities in local publications, instead of the 5-7 employees mentioned above, are now carried out by 1-3 employees. They are responsible for content creation, layout, and distribution of the newspaper.

In the LMF studies «The Donor Field for Media Support in Ukraine,» the section «What Donors Lack in Ukraine» includes a full quote on page 91: «Among the wishes expressed by respondents during in-depth interviews:

1. More independent media with transparent funding sources that are not linked to oligarchs.
2. Better capacity for attracting grant funding, especially at the regional level. ‘There should be a team member dedicated solely to grant applications and subsequent communications, rather than doing this work on a leftover basis.’
3. More activity from print media, radio stations, and TV companies in grant competitions, where online publications currently dominate.
4. More capable local, hyper-local, and niche media that unite the community.»

However, the forced reduction of staff in local newspapers has resulted in a lack of personnel to prepare grant applications and reports for donors. Consequently, the volume of support for media in the field of audiovisual services and online media has been significantly greater than for print media.

Subscriptions

For newspapers to transition to generating income from subscriptions, they need to establish their own delivery network. Additionally, instead of relying on Ukrposhta’s network, they should create their own sales networks in villages and cities of 50,000 or more.

However, there is almost no experience in subscription services and in developing independent networks in villages in Ukraine. If there are no changes in the management of Ukrposhta by 2025 and accordingly no change in Ukrposhta’s operations with print media in Ukraine in 2025, the print run may drop by another 40%, resulting in up to 1.5 million copies.

Advertising

Due to delays in assistance from partners in the USA, advertising revenues in 2024 may be lower than expected, leading to potential further staff reductions in print media and closures of publications in 2025.

Therefore, obtaining financial support from Western donors and the state budget is the primary means of assistance for newspapers in Ukraine.

Income from Subscribers of Local Newspaper Websites

In Ukraine, income from subscriptions by readers to news on local websites is practically nonexistent. This is in stark contrast to the European and Western models of local media operations.

The primary reason for the free model of news and content acquisition from national and local websites is the investments made by oligarchs and local elites in the creation of online media in Ukraine, which provide free content to their readers. The only exception to this rule is the NV.ua website, where the number of subscribers exceeded 15,000 readers per month. Local websites and the «20 Minutes» network had to switch from a subscription model to a free content model after February 2022. At that time, the number of subscribers ranged from 1,000 to 2,000 readers per month.

Research Recommendations for Q4 2024 and 2025:

All proposed studies are not conducted in Ukraine:

1. Research on media consumption of printed media in Ukraine, ages 18+, territory: All of Ukraine.
2. Research on the urgent needs of national and regional printed media among publishers and chief editors.
3. Research on the main threats to printed media in 2025.
4. Research on the quality and delivery times of subscription-based printed media.
5. Research on the losses of newspaper and magazine printing houses and newsprint due to the Russian invasion. The total cost for conducting the proposed studies is up to 40,000 USD.

Forecast for 2025

Without donor assistance and support from the state budget of Ukraine in 2025:

- A reduction in the number of newspapers and magazines by 20%.
- A decrease in subscription circulation by 25-30%.

Based on the research «Media Landscape of Printed Media in Ukraine – 2024. The Impact of the Russian War in Ukraine on Printed Media in Ukraine,» conducted with the support of the Ukrainian Media Fund and the German Marshall Fund of the United States.

Serhiy Tomilenko,

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Member of the Executive Committee
of the European Federation of Journalists

DEVELOPMENT OF REGIONAL MEDIA IN UKRAINE

I. Development of Regional Media in Ukraine

- A. Overview of the Current State of Regional Media
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III. Journalistic Independence

- A. Adherence to Journalistic Standards
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I. Development of Regional Media in Ukraine

A. Overview of the Current State of Regional Media

Regional media in Ukraine are undergoing a period of profound transformation, driven by both global changes in the media industry and specific conditions related to the full-scale invasion of Russia. These media outlets play a critically important role in meeting the informational needs of local communities, especially in wartime.

The study **«Close to Zero: Analytical Report on the Resilience of Frontline Local Media in Ukraine,»** conducted by the National Union of Journalists of Ukraine in partnership with the international organization Free Press Unlimited in 2024, emphasizes the critical importance of local media for providing information to local communities in frontline areas:

«The presence of Ukrainian print media in such regions is an integral part of the country's information security. Materials from local newspapers in areas where it is difficult, if not impossible, to obtain reliable information prepared according to the standards of quality journalism can, at times, literally save lives» (p. 5, authors of the study).

«For people, it is important that the newspaper continues to be published and delivered to readers. It is not only a source of reliable information but also a symbol that the Nikopol district operates under Ukrainian law and within the Ukrainian information space, bringing us closer to victory» (p. 13, editorial staff of the newspaper «Pivdenna Zorya,» Dnipropetrovsk region).

«Our readers say that we are sometimes the only ray of sunshine for them during the war. They love to read stories about life, stories about our military and volunteers» (pp. 11-12, editor of the newspaper «Putivl News,» Sumy region).

«In such settlements, there is often no electricity, internet, or communication, and the newspaper serves as an important source of information about community and district life» (p. 10, editorial staff of the newspapers «Zorya» and «Visnyk Bohodukhivshchyna,» Kharkiv region).

The study «**Ukrainian Local Media in Times of War and Economic Crisis**,» conducted by the National Union of Journalists of Ukraine in May-June 2022, underscores the critical importance of local media. The research was based on surveys of 120 participants from 20 regions and the city of Kyiv in May 2022, as well as 115 participants from 18 regions and the city of Kyiv in June 2022.

Key arguments for the importance of regional media include:

1. «It is critically important to continue the activities of local media in the context of large-scale Russian aggression» (p. 17, findings of the study).
2. «Verified and objective information from professional journalists allows people to make informed decisions. In wartime, these are decisions that save lives and the country» (p. 19, concluding statement of the study).
3. The research shows that despite difficult conditions, «the overwhelming majority of local media leaders are determined to continue working in the same region» (p. 17, findings of the study). This indicates an understanding of the importance of their work for local communities.
4. 80% of surveyed journalists «hope to keep their job» (p. 16, survey results), indicating their readiness to continue fulfilling their vital mission.

This data demonstrates the indispensable role of local media in meeting the informational needs of local communities during wartime, as well as their importance for maintaining social stability and national security in Ukraine.

The depth of the economic crisis faced by regional media in Ukraine as a result of the full-scale war and economic challenges is vividly illustrated by the findings of the previously mentioned study ‘Ukrainian Local Media in Conditions of War and Economic Crisis,’ conducted by the National Union of Journalists of Ukraine in May – June 2022:

1. Temporary suspension of operations:

‘Every third editorial office (29%) temporarily suspended its work for a period of 1 to 3 months.’

2. Cessation of operations:

‘7% ceased operations and have not resumed to date.’

3. Loss of access to premises and property:

‘More than 20% of local media do not have access to the premises they occupied before February 24, 2022, or cannot use their property and equipment.’

4. Loss of income:

- ‘87% – loss of advertisers.’
- ‘71% – loss of income from the sale of airtime or newspaper space.’
- ‘65% – cessation of income from agreements to cover the activities of local government or local self-government.’

5. Cost reductions:

- ‘47% – reduction in content.’
- ‘46% – staff reductions.’
- ‘29% – closure of some projects or sections.’
- ‘30% – abandonment of new projects.’

6. Negative impact on labor collectives:

- ‘30% of editorial offices sent employees on unpaid leave.’
- ‘32% of editorial offices reduced staff.’
- ‘25% of editorial offices are working without salaries.’
- ‘40% of editorial offices reduced salaries and increased workloads.’

7. Staffing issues:

- ‘25% of local media experience a shortage of personnel.’
- ‘In 25% of editorial offices, there are journalists who have relocated to another region of Ukraine or abroad.’

8. Plans for closure:

‘14% of editorial offices consider closing the media outlet as one of the options in the next 6 months.’

The main features of the current state of regional media include:

1. Active digitization and transition to online platforms.
2. Financial instability and the search for new funding sources.
3. Staffing challenges and the outflow of professionals.
4. Changes in content priorities with a focus on military themes.
5. Increased audience trust in local media.
6. Technological upgrades with uneven distribution of resources.
7. Complicated relationships with local authorities.

1. Digitization:

- Most regional media are actively developing their online presence.
- The number of purely digital regional publications is increasing.
- Traditional print publications are gradually transitioning to online formats.

Here are two successful cases of digitization in local media, focusing on specific changes in editorial practices:

The «Visti Snihurivshchyny» Newspaper (Mykolaiv Region): Ihor Novikov, the editor of the publication, discusses the active work on their presence in social networks: *«We are currently working actively, and we already have 4,500 subscribers [on Facebook]. We created a Telegram channel for our media. We update it daily and already have 600 subscribers.»* This indicates the successful implementation of a multiplatform strategy and daily updates of digital content.

The «Putyvi News» Newspaper (Sumy Region): Tetiana Kaushan, the editor of the publication, talks about the introduction of new digital practices acquired during a training mentoring course implemented in 2023 by the National Union of Journalists of Ukraine (NUJU) with the support of the UNESCO headquarters: *«The most useful experience was related to the packaged placement of materials in social networks and preparing content using Canva. [...] We also actively record videos through Zoom. This turned out to be a real find. We post the recorded material on our Facebook page.»*

2. Financial Situation:

- There is a general reduction in advertising budgets.
- The role of grant funding and crowdfunding is increasing.
- Media are trying to diversify their sources of income.
- Many regional media outlets are on the brink of survival due to economic difficulties.

Here are a few examples illustrating how media are adapting to the difficult financial situation and their creative approaches to expanding sources of income and markets even amid economic challenges:

The «Obriyi Iziushchyny» Newspaper (Kharkiv Region): According to chief editor Kostiantyn Hryhorenko: *«We earn on digital platforms by collaborating with direct advertising exchanges and advertisers. We produce souvenir products with local symbols: magnets, mugs, keychains, flags, ribbons, bracelets, eco-bags, etc.»*

The «Vorskla» Newspaper (Sumy Region): Chief editor Oleksii Pasiuha shares: *«We created an additional income source – insurance services. Thanks to them, we maintain jobs and are able to heat the premises. Most importantly, we entered the territory of the neighboring Okhtyrka community, where all four newspapers ceased to exist. Currently, we are selling up to 300 copies at retail points there, but we are gradually increasing the number. This brings in additional funds. Plus, residents of Okhtyrka have started to give advertisements and announcements.»* Unfortunately, due to the intensification of Russian shelling in the spring of 2024, the «Vorskla» editorial office has now relocated from its native community.

3. Staffing:

- The outflow of qualified personnel to national media and abroad.
- An increase in demand for versatile journalists capable of working with different formats.
- A lack of funds for maintaining and training new staff.
- Difficulties in finding qualified specialists, especially photo and video correspondents.
- The mobilization of media workers into the Armed Forces of Ukraine.
- The outflow of personnel to other, better-paying sectors.

Here is what two experienced general directors of leading regional television and radio companies in Western Ukraine say about current staffing issues:

Andriy Rusyniak, founder and general director of LLC «Television and Radio Company AIA» (Ivano-Frankivsk region): *«In the last couple of months, two of my employees left; we are forced to recruit new staff from the journalism faculty, and the newsroom is once again starting a cycle of training. Of course, the company is trying to do everything to keep the audience informed. But training new staff incurs financial expenses, which is a burden for the media.»*

Yulia Vynokur, general director of the TV company «TV-4» (Ternopil): *«Last year, ten people left the Ternopil TV channel ‘TV-4’. Some went to Kyiv, some went abroad, and others moved to government structures because they are stable today. This year, three have already left. And this is a lot for a small team. This is a third of the staff. I do not know how much more we can stretch this team. But for now, we have decided not to search for anyone new and to redistribute the work among those who remain.»*

4. Content:

- A strengthening focus on local news and community issues.
- Increased attention to military topics and security matters.
- The development of formats aimed at a youth audience (videos, podcasts).
- Attention from regional media to covering complex and sensitive topics (victims of sexual violence caused by the war, local collaborators, adaptation of veterans, etc.).

The points regarding content in regional media can be illustrated by testimonies from editors who participated in a joint initiative by the National Union of Journalists of Ukraine (NUJU) and the German Marshall Fund of the United States to develop new formats for local journalists to engage with their audiences:

The newspaper «Visti Barvinkivshchyny» (Kharkiv region) conducted a survey of the community regarding current issues. Editor Iryna Stolbova shares: *«In two days of the survey, we collected 531 votes. This exceeded all expectations and forecasts! With their responses, people expressed their vision for solving the problem of improving our community's territory.»* According to the survey results, 18% of the votes were in favor of involving more unemployed citizens in work to improve the areas. Journalists discussed this idea with the leadership of the Barvinkiv Employment Center, and the materials were published in the newspaper.

Radio «Nostalgia» from Nikopol, conducting «hotlines» in its front-line region, has made psychological support for listeners its main task. Journalist Olena Halyna notes: *«Our creative team believes that we have helped our radio listeners become calmer thanks to our psychological programs on air. We provided psychological advice for those living under daily shelling and supported the psycho-emotional stability of our radio listeners.»*

The newspaper «Novyi Den» from the Kherson region actively uses video formats. Editor Anatolii Zupyna explains: *«In addition to working in text format, the newspaper also publishes videos from its trips on its platforms. For instance, the material about a trip to the village of Pravdyne has already received almost 3,000 views.»* This indicates the development of video content, which is typically more aimed at a younger audience.

5. Audience and Role in Society:

- Growth in trust towards local media compared to national media.
- Increase in the audience of regional online media.
- Decrease in the audience of traditional print publications.
- Strengthening the role of regional media as a platform for discussing local issues.
- Growing importance in disseminating critically important information during wartime.

A study conducted in May 2024 by the National Union of Journalists of Ukraine (NUJU) – **Research on the information needs of residents of de-occupied and frontline territories** – revealed a number of important trends regarding the role and audience of regional media in Ukraine, particularly in the context of war and in frontline areas.

Increase in Trust and Audience of Online Media

The results of the study show an increase in trust towards local media, especially their online versions. While social networks remain the most accessible source of information (86.3% of respondents have the easiest access to them), websites rank second with 65.1%. It is important to note that when assessing trust in information sources, websites demonstrate a high level of relative trust (66.2%), surpassed only by newspapers (90.4%) and personal contacts (70.6%).

«I am deeply convinced that reliable, licensed sources of information must operate in our region,» says Maksym Tur, an oncologist from Zaporizhzhia. This quote highlights the importance of official, verified information sources at the regional level, which contributes to the growth of trust in local media.

Decrease in the Audience of Traditional Print Publications

Despite the high level of trust in newspapers, the study indicates a decrease in their audience. Only 29.2% of respondents identified newspapers as the most accessible source of information. This may be related to objective difficulties in distributing print publications in frontline areas and de-occupied territories.

Strengthening the Role of Regional Media

The study demonstrates the growing importance of regional media as a platform for discussing local issues and as a source of critically important information during wartime. 75.3% of respondents indicated that they are most interested in the security situation in their city, district, or village, while 72.3% are interested in local events.

«In order to improve the quality and accessibility of information in our region, I believe that the presence of professional media representatives who are committed to objectively presenting information is essential,» emphasizes Judge Nataliya Korolchuk from the Kherson region. This opinion illustrates the importance of professional journalism at the local level to ensure quality and objective information.

Role in Disseminating Critically Important Information

In wartime conditions, regional media play a key role in disseminating vital information. The study showed that 36.4% of respondents receive information about important events and decisions of local authorities precisely through the media. This ranks second after social online platforms (43.1%), indicating the high importance of traditional media in informing the population.

«For quality journalism in our region, there must be reliable and licensed sources of information, not nameless Telegram channels that one believes just like that – as they say, ‘on the honor of a word,» emphasizes educator Valentyna Pavlovych from the Zaporizhzhia region.

In summary, the NUJU study demonstrates **the growing role of regional media in wartime, particularly their online versions. They are becoming key sources of reliable information about local events and the security situation, play an important role in discussing local issues, and provide communities with critically important information.** At the same time, traditional print publications face challenges related to a shrinking audience, necessitating the adaptation of their strategies to new media consumption conditions.

6. Technological Equipment:

- Uneven technical support for various regional media.
- The need for equipment upgrades, especially for multimedia production.

A significant portion of regional media faces technical challenges, as editorial equipment is worn out, and the active updating of this equipment through donor programs has significantly slowed down since the second half of 2023. In 2022, 17% of surveyed NUJU editorial offices noted «lack or damage of equipment» as one of the obstacles to their work. Additionally, 10% of editorial offices lost access to their premises or property due to military actions, and 9% due to occupation. In 5% of editorial offices, buildings or property were damaged or destroyed. Eighteen percent of respondents indicated «disruption of production processes and logistics.»

7. Interaction with Authorities:

- Different levels of dependence on local authorities in various regions.
- Instances of pressure from local elites on regional media.

The interaction of regional media with local authorities in Ukraine is characterized by complex dynamics that vary depending on the region and specific circumstances. Analyzing this interaction reveals two key aspects: differing levels of dependence on local authorities and cases of pressure from local elites.

Different Levels of Dependence on Local Authorities in Various Regions

The level of dependence of regional media on local authorities varies significantly across different regions of Ukraine. This variability is determined by several factors:

1. Financial Dependence:

In some regions, local media are significantly dependent on funding from local budgets. This is particularly characteristic of small towns and rural areas, where the advertising market is underdeveloped enough to ensure the financial independence of media outlets. Additionally, significant budget allocations for media coverage of their activities are found in Ukrainian megacities, such as Kyiv and Dnipro.

Case Study: The Impact of Budgetary Expenditures on the Media Market in Dnipro

According to an investigation published on the «Our Money» website on February 26, 2024, the Dnipro city authorities, led by Mayor Borys Filatov, actively use budgetary funds to inform about their activities, which has a significant impact on the local media market.

Key Aspects:

1. Volume of Funding: In 2024, divisions of the Dnipro City Council conducted ten tenders for advertising services totaling 31.24 million UAH.
2. Distribution of Funds:
 - The Communal Enterprise «Organizational and Analytical Service» allocated 13.23 million UAH for placing information in the media.

- Various departments of the city council spent 18.01 million UAH on similar services.
3. Media Coverage: - Online media (local news sites), radio stations, television channels, print publications, social networks (Facebook, Telegram).
 4. Pricing:
 - The cost of publications in online media varies from 1,700 to 21,900 UAH.
 - Placement on radio costs 790 UAH for a 60-second message.
 - Monthly placement on local TV channels costs 210,000 – 230,000 UAH.
 5. Market Impact:
 - Creation of dependence of media on budget funding.
 - Potential influence on editorial policy through financial levers.
 - Support for media resources loyal to the authorities.
 6. Transparency of the Process:
 - Most contracts (8 out of 10) were concluded without competition due to the absence of other tender participants.
 - The requirement to provide cooperation agreements or letters of guarantee from all media for participation in tenders may limit competition.
 7. Connections with Authorities:
 - Some contractors have ties to local authorities or the mayor's party «Proposal.»⁵⁰

2. Ownership:

Some regional media are owned by local authorities or related structures, which naturally influences their editorial policies.

According to the new Law «On Media,» authorities are prohibited from establishing media outlets. However, previously created communal television and radio companies (TRCs) continue to exist. In the future, these media are to be transformed into public entities, which should ensure their independence from local authorities. Currently, the situation remains ambiguous.

⁵⁰ Сорока А. «Мерія Філатова роздала 31 мільйон на саморекламу в медіа, Фейсбуці та Телеграмі» // Наші гроші, 26.02.2024

Problems of Interaction with Local Authorities

Currently, two opposing trends can be observed in the interaction of communal media with local authorities:

1. Excessive loyalty to local authorities.
2. Direct conflicts over property rights.

These trends are vividly illustrated by two recent cases from Zaporizhzhia and Chernihiv.

Case 1: Zaporizhzhia – Conflict Surrounding the «MTN» TV Channel

In Zaporizhzhia, a conflict arose between the management of the municipal TV channel «MTN» and the head of the department of internal policy, press, and information of the city council, Yevhen Kovalenko.

- The TV channel accused the official of pressure and interference in its editorial policy.
- The official denied the accusations and pointed to legal violations by the channel's director.
- The channel's director, Iryna Poliektova, was suspended from her duties, and official investigations are being conducted against her.

This case demonstrates how ownership rights can be used to influence editorial policy and how conflicts can arise from differing understandings of the local government's authority over municipal media.

Case 2: Chernihiv – Financial Pressure on the «Novy Chernihiv» TV Channel

In Chernihiv, a conflict emerged between the municipal TV channel «Novy Chernihiv» and the head of the city military administration, Dmytro Bryzhynskiyi.

- Bryzhynskiyi announced plans to cut the channel's funding by 3.45 million UAH.
- The TV channel perceived this as an attempt to exert pressure and a possible attempt to close the media outlet.
- Bryzhynskiyi explained his actions by stating that the channel was being used by the city council for its own publicity.

This case illustrates how financial leverage can be used to influence municipal media and how conflicts between different branches of local government can impact the operation of the media.

Conclusions

Both cases demonstrate that municipal media in Ukraine remain vulnerable to the influence of local authorities. There is an urgent need for the rapid transformation of such media into truly independent public media, as stipulated by the «On Media» Law. At the same time, these cases show that even under the current ownership model, municipal media can defend their editorial independence, although they face significant challenges.

3. Political Landscape:

In regions with a more competitive political environment, media often have more opportunities for maneuvering and independence.

4. Economic Development of the Region:

More economically developed regions typically have a more advanced media market with a greater number of independent players.

5. Historical Traditions:

Some regions have long-standing traditions of independent journalism, which influence the current state of affairs.

The interaction between regional media and local authorities in Ukraine remains a complex and heterogeneous process. While the overall trend is towards greater media independence, significant differences between regions persist. Systemic changes are needed to improve the situation, including strengthening the financial independence of media, enhancing the legislative framework, and raising professional journalism standards.

II. Frontline Local Media:

A. Features of Media Functioning in Frontline Zones

Frontline media in Ukraine operate under extremely difficult conditions. Many frontline areas experience issues with power supply, unstable mobile network operations, and internet connectivity. In such conditions, printed media often become the only accessible source of information for local residents in regions such as Kherson, Zaporizhzhia, Donetsk, Kharkiv, Sumy, and others.

Despite the challenges, since the onset of the full-scale invasion, the National Union of Journalists of Ukraine has managed to restore the publication of 32 print editions in frontline and de-occupied territories, with a total circulation of 450,000 copies. This reflects a high demand for and viability of local media in frontline zones.

B. The Safety of Journalists in Frontline Areas

The safety of journalists in frontline areas remains a critical issue. Media workers often risk their lives while gathering information in dangerous conditions.

Case Study: Olga Zvonaryova, a Journalist Injured While Performing Professional Duties Olga Zvonaryova is a journalist for Ukrinform who worked in Zaporizhzhia, a city located near the frontline.

Incident

On April 5, 2023, Russian troops launched three missile strikes on Zaporizhzhia. When medical personnel, rescuers, and journalists arrived to cover the aftermath of the attack, the enemy carried out two more missile strikes. During this secondary bombardment, Olga Zvonaryova sustained a severe leg injury.

Consequences

- Olga suffered a serious leg injury and required prolonged treatment and rehabilitation.
- After more than four months of treatment, the journalist is still in the process of recovery.
- At the age of 40, Olga is forced to learn to walk again.

C. The Specificity of Content in Frontline Media

The content of frontline media is characterized by a high degree of relevance and importance to local communities. According to Anatolii Zhupyna, the editor-in-chief of the Kherson newspaper «Novy Den,» for many readers, the newspaper is not only a source of information but also a form of psychological support.

An example of specific content can be found in an article by «Novy Den» about the consequences of the Russian destruction of the Kakhovka Reservoir dam, detailing the scale of the catastrophe for local residents.

D. Technical and Logistical Challenges

Frontline media face numerous technical and logistical challenges. One significant issue is the delivery of newspapers to readers. To address this problem, volunteers, local administrations, and even libraries are involved (for example, in Lyman in the Donetsk region or in Kherson).

Additionally, many editorial offices have lost their premises and equipment due to military actions. Journalists often work remotely, lacking the ability to operate from the editorial office.

Case Study:

Challenges Faced by the Frontline Newspaper «Zorya»

In the small town of Zolochiv in the Kharkiv region, the newspaper «Zorya» is published. The editor-in-chief, Vasyl Myroshnyk, has become a true hero for the local community. Every week, he gets behind the wheel of his own car and embarks on a dangerous journey. His goal is to deliver the latest issue of the newspaper to frontline and semi-destroyed villages in the Zolochiv area. This territory is surrounded by Russia on three sides, making each trip potentially lethal.

Vasyl's route passes through areas that, in his words, «are easily visible to Russian snipers.» However, this does not deter the brave editor. He understands how important his mission is for local residents, who often find themselves in an information vacuum.

The war has left its mark on these lands—destroyed schools and kindergartens, damaged roads and homes. Approximately a hundred residents of Zolochiv have lost their lives at the hands of the occupiers. Under these circumstances, the work of Vasyl and his team takes on special significance. They do not simply inform but also document the consequences of Russian aggression, recording every fact of destruction and crime.

Vasyl speaks with great respect about his readers, referring to them as «a special breed of people.» He admires their ability to adapt to the inhumane conditions of war and considers it his duty to write about these people and the events occurring in frontline territories.

The importance of «Zorya's» work is hard to overstate. As journalist Hanna Chernienko, who works in the Kharkiv region for national and international media, notes, even a small circulation of a local newspaper can be «like a million-subscriber Telegram channel» for local residents. In 2022, when she visited the liberated territories of Izyum, Kupiansk, and Vovchansk, people primarily asked, «What is happening?» The lack of information breeds fear and despair, and it is here that publications like «Zorya» come to the rescue.

The story of «Zorya» and its editor Vasyl Myroshnyk is a tale of courage, dedication to duty, and resilience of spirit. It is an example of how, even in the toughest conditions, people find the strength to continue their work, support others, and fight for the truth. At the same time, it is a story that highlights the urgent need for support for such publications,

ensuring the safety of journalists, and developing new, safer methods for delivering information to high-risk areas. The Information Service of the National Union of Journalists of Ukraine produced a documentary film titled «On the Edge,» telling the story of the newspaper «Zorya» and its courageous editor for both Ukrainian and international audiences.

E. The Role of Frontline Media in Informing Local Communities

Frontline media play a critically important role in informing local communities. For example, the Bakhmut newspaper «Vpered» served as a valuable source of information about humanitarian aid and evacuation routes from the city during active combat operations. Local journalists, even when working remotely, possess a deep understanding of the situations in their communities and can provide the most accurate and up-to-date information.

F. Support for Frontline Media from the State and International Organizations

The National Union of Journalists of Ukraine (NUJU) plays a key role in supporting frontline media. With the assistance of international partners, the union helps restore newspaper publication, provides financial support, and organizes training projects to enhance the economic sustainability of media outlets. International organizations also provide substantial support to frontline media, including a significant project called «Enhancing Media Resilience in Ukraine,» implemented by the Swiss foundation «Hirondelle» and the Institute of Regional Press and Information (IRMI). In 2024, the project offers financial and mentoring support to 23 media outlets, prioritizing those in frontline areas. Technical and material assistance for frontline media journalists is also provided through the «Voices of Ukraine» project, which is supported by the European Centre for Press and Media Freedom (ECPMF) and the German Foreign Office. Notable efforts to support local frontline media also come from the headquarters of UNESCO, the International and European Federations of Journalists, the Academy of Ukrainian Press, and Free Press Unlimited.

III. Journalistic Independence in Times of War

Self-regulation is an important mechanism for ensuring journalistic independence and professional standards. In Ukraine, the Commission on Journalistic Ethics (CJE) plays a crucial role in this process. The CJE emphasizes the need to adhere to fundamental standards such as balance of opinions, separation of facts from commentary, accuracy, and completeness of information, even in challenging conditions of reporting on combat operations. The CJE states: «In informational materials, avoid emotionally charged words and expressions—focus on presenting facts and context. Do not assist Russian propaganda, which aims to sow panic, fear, and anxiety among Ukrainians» (CJE, 2023).

At the same time, journalists face additional challenges. For instance, the need to quickly transmit information can conflict with the requirement for thorough fact-checking. There is also a risk of unintentionally disclosing information that could be useful to the enemy. The head of the CJE, Andriy Kulykov, emphasizes: «Lying for victory, hiding the truth is as destructive as misleading for any other purpose, no matter how noble it may seem» (CJE, 2023). The CJE not only provides support to regional media but also promotes the enhancement of professional standards.

Important elements of self-regulation also include mutual support and the exchange of experience among journalists. This is particularly relevant for frontline media, which face unique challenges. Oleksiy Pohorelov, a member of the CJE, notes: «Feedback from both complainants and editorial offices gives us confidence that self-regulation is developing successfully and that more and more editorial offices are listening to the conclusions and recommendations of the CJE» (CJE, 2023). Key factors supporting journalistic independence include international assistance, the active role of professional organizations, and mutual support within the media community.⁵¹

⁵¹ Commission on journalistic ethics (2023). Self-regulation of Ukrainian media during martial law in Ukraine. From the work experience of the Commission on journalistic ethics: Analytical and reference collection <https://cje.org.ua/library/samorehuliatsiia-ukrainskykh-media-pid-chas-dii-voiennoho-stanu-v-ukraini-vydannia-druhe/>

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TECHNOLOGICAL CHANGES:

AN ANALYSIS OF TECHNOLOGY USE IN MEDIA,
PARTICULARLY SOCIAL NETWORKS, STREAMING
PLATFORMS, AND INTERACTIVE MEANS
FOR INFORMATION DISSEMINATION

In many countries around the world, the development of innovations in the media sector is driven by the search for new funding sources and ways to monetize editorial work. One example is the rapid growth of free newspapers in the early 2000s in EU countries and the USA, initiated by the editorial team of the Swedish newspaper Metro⁵². Metro newspapers were distributed in suburban trains, allowing advertisers to expect that one copy of the free newspaper would be held by 3-4 people who use suburban trains daily for commuting. This made expensive advertisements significantly exceed printing costs, rendering the publication profitable. However, the spread of the coronavirus pandemic in 2020 ultimately «killed» this business model due to the temporary desolation of public spaces and public transport.

The New York Times was one of the first publications to offer its readers digital subscriptions in 2011⁵³—initially, the monthly subscription cost \$15, which corresponded to the price of several printed copies of the newspaper or a few cups of coffee. Amid the crisis in print media, the leading American publication focused on micropayments, which eventually brought in hundreds of millions of dollars from loyal readers worldwide who appreciated the benefits of accessing digital content. By the end of 2023, The New York Times managed to establish and maintain a base of 10 million subscribers, and annual revenue from digital subscriptions surpassed \$1 billion.⁵⁴ At the same time, many other American publications showed significantly more modest results.

Ukrainian media also actively engaged in creating subscriptions, peaking between 2018 and 2021, until the full-scale invasion disrupted

⁵² World: 'Metro' Newspapers Create Publishing Phenomenon <https://www.rferl.org/a/1098283.html>

⁵³ The Times Announces Digital Subscription Plan <https://www.nytimes.com/2011/03/18/business/media/18times.html>

⁵⁴ The New York Times made more than \$1 billion from digital subscriptions in 2023 <https://www.niemanlab.org/2024/02/the-new-york-times-made-more-than-1-billion-from-digital-subscriptions-in-2023/>

the business plans of many editorial offices. Additionally, digital subscriptions were not the only way to monetize the work of Ukrainian journalists—advertising, reader club development, sponsorships, and partnerships also generate revenue. The most successful Ukrainian media in 2023 increased their income compared to the previous year. For example, according to Opendatabot⁵⁵, the Lux TV and Radio Company, which owns the 24 Channel and its internet portal, earned UAH 440.7 million, nearly three times more than in 2022.

The Media DK publishing house, which includes NW-MEDIA LLC and Radio Era, received UAH 115.6 million in revenue, one and a half times more than the previous year. Ukrainian Forbes increased its revenue by 116% to UAH 110.2 million in 2023. Ukrainian Pravda also earned more than twice as much compared to 2022—UAH 66.3 million. Compared to Western countries, these figures are not particularly high, and the media industry in Ukraine is also counting on external support.

Over the past decade, a large number of Ukrainian editorial offices have rethought their positioning—from the offline world, where large expenses like printing were prevalent, to the digital space. Today, terms like SEO audits, search engine optimization, website core, keywords, push notifications, A/B testing, SMM marketing, and email marketing are widely used in the media environment. Behind these terms lie approaches and areas of digital marketing that are well known to most media managers focused on developing media in the digital space. Investment in building an online presence and forming and maintaining audiences in the online space has become an irreversible process for many editorial offices, faced with the choice of «adapt or die.»

Media sector reforms have also contributed to the reorientation of media toward the online space. According to the Law of Ukraine «On the Reform of State and Municipal Print Media» (2015), editorial offices of municipal media were gradually deprived of state funding. This forced management to look at market «rules of the game,» where funds needed to be earned in ways other than through city budgets. For the media, this process is painful and not always successful, leading many local media to still rely on tenders for «informational support of city council activities» as a stable source of income.

⁵⁵ How much do Ukrainian online media earn - Opendatabot
<https://speka.media/skilki-zaroblyayut-ukrayinski-onlain-media-opendatabot-pn0877>

Operational costs for labor in Ukrainian media are not high—recent research from the Media Development Fund showed that management in regional editorial offices earns between \$300 and \$800 per month⁵⁶, which is incomparably low compared to any other European country.

It has been several decades since media lost their monopoly on disseminating news to audiences, but only in recent years has it become clear that on shared access platforms (messengers, social networks), it is more successful to retain audience attention compared to traditional online tools like websites. Young people are likely a «lost opportunity» for many editorial offices unless they develop their online presence through social networks used by the younger generation.

A 2024 study by OPORA⁵⁷ shows that young people most often choose social networks and the internet in general for news. News on social networks is consumed by 93.3% of Ukrainians aged 18 to 29 and 85.3% aged 30 to 39. People aged 40 to 49 (81.8% compared to 87% in 2023) and those aged 50 to 59 (71.5% compared to 80.1%) have become less likely to use social networks for news. In 2024, only 18.9% of young people aged 18–29 and 21.1% of those aged 30–39 get their news from television.

Among social networks and messaging apps, Telegram is particularly popular among the youth—over 90% of respondents aged 18 to 29 use this platform for news. Telegram confidently holds the lead among both female (82.8%) and male (72%) audiences.

In second place among men, by a large margin, is YouTube, chosen by 63.7% of men and over 56% of women. Women are more active on Facebook (47.9%) compared to men (40.4%) and on Instagram (32.8% versus 25.6%). TikTok is used for news almost equally by men (26.3%) and women (27.2%). At the same time, Telegram is more popular in the south and center (around 80% of residents in these regions choose it), while it is less popular in the east and west (74.2% and 72.7%, respectively).

Telegram: Popularity Amid Dangers

The full-scale invasion of Russia into Ukraine in 2022 triggered a dependency of the Ukrainian information space on Telegram. Given

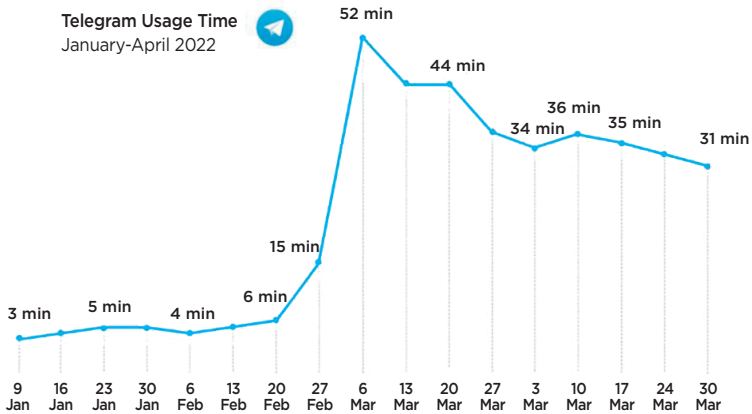
⁵⁶ Financial support of online media in Ukraine 2023: salaries and trends <https://research.mediadevelopmentfoundation.org/finance-2023>

⁵⁷ Media consumption of Ukrainians: the third year of full-scale war <https://www.oporaua.org/viyna/doslidzhennya-mediaspozhyvannya-ukrayinciv-tretiy-rik-povnomasshtabnoyi-viyni-25292>

the uncertainty in the early days of the invasion, a significant number of Ukrainians became reliant on the Russian-origin messenger, which proved convenient for quickly exchanging information and tracking developments in the country, city, or at the district level.

Kantar's research indicates that in the early days of the invasion, Ukrainians began to spend more time consuming information on Telegram—using this messenger became a new everyday habit. Before the invasion, the average user spent 5 minutes a day on Telegram, whereas from February onwards, this figure rose to 40 minutes per day.⁵⁸

Telegram usage by Ukrainian users in the early months of the full-scale Russian invasion



The history of the messenger in Ukraine, which was primarily popular in Russia and actively used by the Kremlin for disinformation, reflects the Russian developmental path in detail. A 2020 study by Liga.net analyzed how Telegram entered the information space of Ukraine:

The Russian invasion of the Ukrainian segment of Telegram occurred around 2018-2019 during the height of the presidential campaign. During this period, about 15 new «Ukrainian» channels were created.⁵⁹











⁵⁸ Using Telegram is a new habit of Ukrainians during the war
<https://www.kantar.com/ua/inspiration/advertising-media/use-of-telegram>

⁵⁹ Telegram. How Pavlo Durov's anonymous empire is organized
https://project.liga.net/projects/durov_telegram_ua/


All these channels were anonymous, and thus did not bear any responsibility for their content, purposefully creating an image of «closeness to power circles.» Russian pro-Kremlin channels began to promote these newly created allegedly Ukrainian channels, and their content consisted of «political insights,» emotional comments about events in the country, and the publication of unpredictable assumptions, such as «there will soon be a resignation,» which created the effect of an alleged presence in Ukraine.

The most well-known Telegram channels, which were promoted by Russia, included Legitimny, Resident, Joker, Sheptun, and others. Currently, the so-called Ukrainian anonymous Telegram channels can be divided into two types: those administered locally (with Ukrainian phone numbers) and those linked to foreign phone numbers, primarily

The most popular anonymous Telegram channels in Ukraine as of 2019

		Total Reach, million*	Number of subscribers
	Legitimate	50,2	62 000
	Dark Knight	20,8	69 300
	Joker	20,4	78 500
	Resident	18,2	29 800
	Woman with a	12,9	23 000
	Scythe	12,2	22 000
	Crocodile	11,8	14 000
	Whisperer	8,0	17 500
	Scout	6,5	12 000
	ZeRada	5,1	20 100

* — Total reach refers to the number of views of all publications in 2019.
Data is current as of January 22, 2020.

 **NITA.net**
Liga.net

in European countries. According to a study by Liga.net, by 2019, the reach of the ten most popular Telegram channels in Ukraine exceeded 166 million views.⁶⁰

Over the following years, the popularity of these channels increased exponentially—by 2024, the audience of just one channel, Legitimny, exceeded one million subscribers (16 times larger than in 2019), while the content continued to support Russian propaganda.

The rise of Telegram in Ukraine is not solely due to information special operations by the Kremlin. The convenience of using it from desktops and mobile versions, along with the ease of creating channels and bots, are features that attract users. Despite the platform's questionable origins, the Ukrainian government has also contributed to the legitimization of Telegram in Ukraine by developing its own channels on the platform. As of 2024, government officials, politicians, political parties, public figures, the Armed Forces of Ukraine, and law enforcement agencies use Telegram. While the use of Telegram on the front lines is prohibited, the government promotes and encourages the use of bots to collect and transmit information about enemy actions, particularly through the «eVorog» bots from the Ministry of Digital Transformation, as well as SSU and DIU bots. At the end of April 2024, these government bots suddenly stopped functioning and remained blocked for almost a day, demonstrating the dependency of this tool on its developers.⁶¹

Ukrainian state institutions monitoring coordinated Russian propaganda efforts note that Telegram is a key platform for Russian information special operations—this is possible due to the anonymity of Telegram channels. The Center for Strategic Communications and Information Security at the Ministry of Culture has repeatedly emphasized the dangers of Telegram and occasionally publishes a list of channels coordinated by the FSB. Among other things, a list of 100 Russian Telegram channels that mimic Ukrainian ones has been published.⁶²

⁶⁰ Ibidem

⁶¹ Chat-bots of GUR, SBU and «eVorog» in Telegram have resumed their work <https://www.radiosvoboda.org/a/news-telehram-blokuvannya-chat-bot/32924844.html>

⁶² Ukrainians are urged not to use 100 Telegram channels that spread fakes of the Russian Federation <https://netfreedom.org.ua/article/ukrayinciv-zaklikayut-ne-koristuvatisya-100-telegram-kanalami-shcho-poshiryuyut-fejki-uf>

At the same time, the problem with Telegram is not solely related to the maximum dissemination of enemy propaganda, as this is a characteristic of any platform. Using Telegram is inherently dangerous due to its design and data control. Modern Western messengers are defined by secure message exchange through end-to-end encryption, which makes external interception impossible. In contrast, Telegram, by definition, features unsecured communication, meaning that data on its servers is stored in plain text. Additionally, the «secure» or «secret» chat option is used by an absolute minority of users, as it requires separate configuration.

Another global issue with Telegram is that the application is not completely open-source, meaning its full code is not publicly available for the community to conduct an external audit for vulnerabilities—this would allow everyone to understand whether dangerous backdoors, entry points for malicious actors, or intelligence agencies are embedded in the Telegram code. As noted by Ukrainian cybersecurity experts, “the source code (of Telegram) is not publicly available. This means the cybersecurity community cannot confirm or deny claims that the content of messages is indeed encrypted and not transmitted to third parties.”⁶³

However, the government is not in a hurry to abandon Telegram, considering its audience reach and functionalities, such as bots, emphasizing the usefulness of these tools. At the same time, the question of who has access to sensitive data exchanged through chatbots on an unsecured platform is not particularly discussed.

In the context of war, Telegram, with its convenience for third-party developers, has been actively used to create notification bots. Amid constant ballistic attacks or power outages, city residents are signing up in large numbers for local bots or groups that provide vital notifications. Third-party developers created such bots for individual buildings or residential complexes to inform about power outage durations; later, local government authorities adopted this approach. For example, the «Kyiv Digital» app initially notified users about air alerts and later added a feature to inform users about power outages and restorations at their addresses.

The growing influence of Telegram through anonymous political channels aimed at impacting political processes, as well as regional (also anonymous) channels about local community life, has exerted significant

⁶³ In search of a compromise between convenience and risks. What Ukraine should do with Telegram
<https://novynarnia.com/2024/06/18/shho-ukrayini-robyty-z-telegram/>

pressure on professional media. Professional journalists are required to adhere to journalism standards—fact-checking, taking responsibility for content, and following the principle of «do no harm»—all of which are often abused by anonymous Telegram channels that publish images of victims, dubious claims, and emotional content. As Telegram attracted a mass audience, many professional media outlets began to develop their own Telegram channels, as this ecosystem already had an audience accustomed to consuming news.

Since media cannot rely on the speed of news publication due to the need for verification, newsrooms did not always achieve immediate success. As of July 2022, among the 100 most popular channels on Telegram in Ukraine, anonymous channels (such as Trukha, Ukraine Now, Real War), political figures (Volodymyr Zelensky, Vitaliy Kim, Anton Herashchenko, Oleksiy Arestovych), and pro-Russian channels (Resident, Montyan, New Edition) held the leadership.⁶⁴

At the same time, only four Telegram channels managed by professional editorial teams could boast good numbers among media as of 2022. These included:

- TSN (868 thousand subscribers)
- UNIAN (776 thousand)
- Public News (301 thousand)
- Ukraine 24 (404 thousand)

However, shortly thereafter, the channel «Ukraine 24» dropped out of this ranking. It belonged to the TV channel «Ukraine,» which was part of the media business of Rinat Akhmetov. In 2022, Akhmetov approved the decision to exit the media business, and accordingly, the Telegram channel «Ukraine 24» stopped updating, leading to a loss of subscribers.

As of summer 2023, the leadership among Telegram channels was held by the Kharkiv channel Trukha, with its 2.7 million subscribers. Over the past two years, the societal role of this channel has significantly increased—the Office of the President of Ukraine began including Trukha in the pool of journalists invited to press conferences with the country's top officials. This marked a gradual legitimization of Telegram, although Trukha and similar channels do not have legal status, have not

⁶⁴ From Trukhy to Gordon: the most popular channels of the Ukrainian Telegram segment <https://detector.media/monitorynh-internetu/article/202665/2022-09-09-vid-trukhy-do-gordona-naypopulyarnishi-kanaly-ukrainskogo-segmenta-Telegram/>

undergone voluntary registration as online media according to the adopted media law, and bear no responsibility for their publications. At the same time, some anonymous channels, such as Joker, have been noted for conducting systematic information attacks on Ukrainian businesses, including the transportation company Uklon.⁶⁵

The most popular news and political Telegram channels in Ukraine as of July 2023



The expansion of Ukrainian media on Telegram continues, with journalists running their own channels alongside editorial ones. One aspect of this popularity is the accessibility of Telegram in temporarily occupied territories (TOT). It is one of the few options for editorial offices to maintain communication with residents of these areas. The accessibility of

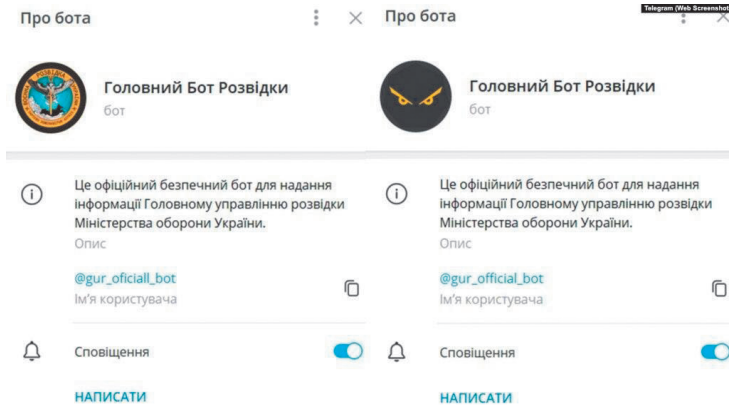
⁶⁵ Uklon appealed to the law enforcement authorities regarding the «disinformation attack» by the Telegram channel «Joker» <https://detector.media/infospace/article/224099/2024-03-12-uklon-zvernuvsya-do-pravookhoronnykh-organiv-z-pryvodu-dezinformatsiynoi-ataky-z-boku-telegram-kanalu-dzhoker/>

Telegram in TOT is due to Russia promoting the platform—unlike other Western technological tools like Facebook, Instagram, and YouTube, the Kremlin does not block Telegram.

However, using Telegram in temporarily occupied territories is extremely dangerous, as Russian security services have learned to recover deleted user communications, and during checks, they often arrest Ukrainians who felt safe because they believed they had deleted conversations in the messenger that could indicate their pro-Ukrainian views.

Ukrainian security services encourage residents of Ukraine, including those in temporarily occupied territories, to report on the enemy specifically through Telegram bots. At the same time, the enemy creates clones of official bots, stealing the identity and descriptions of these official bots⁶⁶—users fall into this trap and pass information to the FSB, after which they are arrested. To distinguish between official and unofficial bots, one must be extremely attentive, and furthermore, ensure that the link to the bot is published on an official, not a counterfeit, website.

Fake (left) and real (right) bots of the Main Directorate of Intelligence



⁶⁶ Instead of the SBU, you write to the FSB: Russian special services are replacing Ukrainian chatbots in Telegram. How not to get hooked? <https://www.radiosvoboda.org/a/telegram-chat-boty-rosiya/32943329.html>

Ukrainian journalists write on Telegram but also write about Telegram, analyzing its advantages and disadvantages and conducting investigations. In 2024, the reputation of Telegram is questionable for many, as evidenced by the boycott of some editorial offices, such as Hromadske Radio, regarding this messenger.⁶⁷ Alternatives to Telegram should not only consider Western options like WhatsApp and Signal but also the functionality of decentralized social networks that allow for channel creation, such as Matrix.

Will Ukrainian Media Benefit from TikTok?

In recent years, the Chinese social network TikTok has shown confident audience growth worldwide—by 2020, the app was the most downloaded in the world.⁶⁸ The audience of this social network during its early development was primarily young people, as TikTok offers short videos lasting from 15 to 60 seconds, allowing users to quickly consume content—today, users are not always ready to concentrate on long-format content. TikTok also has some of the most complex personalization algorithms, which select videos based on users' supposed interests—all aimed at increasing content consumption on the platform. One of the most appealing factors for young people on TikTok is the simplicity of creating and editing videos, working with existing footage, adding music, and easy sharing. The algorithms of TikTok, which no one can fully understand, can bring videos to the forefront, giving them millions of views.

According to Kantar Ukraine data, in April 2024, TikTok's audience in Ukraine among the urban population aged 18 to 55 was 9.4 million users⁶⁹. At the same time, the audience of the Chinese app worldwide reached 1.56 billion active users monthly in 2024, while the revenue of ByteDance, which manages the platform, increased to 120 billion dollars in 2023.

⁶⁷ The reasons for Ukrainian media's rejection of Telegram: security and disinformation <https://hromadske.radio/publications/prychyny-vidmovy-ukrainskykh-media-vid-telegram-bezpeka-ta-dezinformatsiia>

⁶⁸ TikTok has become the most downloaded application in the world, overtaking Facebook <https://www.epravda.com.ua/news/2021/08/10/676760/>

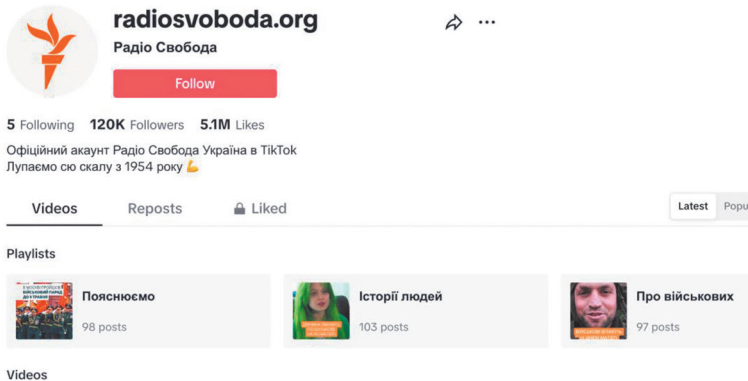
⁶⁹ TikTok has suspended negotiations with Ukraine regarding the opening of its representative office https://zaxid.net/tiktok_prizupiniv_peremovini_z_ukrayinoyu_pro_vidkrittya_svogo_predstavnitstva_n1588128

Moreover, TikTok is the leader among all social networks in terms of time spent on the platform—on average, users worldwide spend about 34 hours per month on this service, followed by YouTube with 28 hours.⁷⁰

The rapid growth of TikTok and the presence of a young audience that ignores classic Facebook and other “heavier” social networks are prompting Ukrainian media professionals to create their own accounts on this platform. This experience has not always been successful, and due to the peculiarities of working on TikTok, some editorial offices, like Radio Free Europe, had to relaunch their TikTok account—deciding to create content specifically for the platform and emphasizing the regularity of posts.⁷¹

Given the faster consumption of content on TikTok, the Radio Free Europe editorial team has focused on explanatory videos, also creating stories about specific people and publishing content about Ukrainian military personnel. However, TikTok often deletes content about the war as undesirable for its audience.

Radio Liberty’s TikTok account as of August 2024



radiosvoboda.org
Радіо Свобода

Follow

5 Following 120K Followers 5.1M Likes

Офіційний акаунт Радіо Свобода Україна в TikTok
Лупаємо сю скалу з 1954 року 🇺🇦

Videos Reposts Liked Latest Popu

Playlists

- Поясносно** 98 posts
- Історії людей** 103 posts
- Про військових** 97 posts

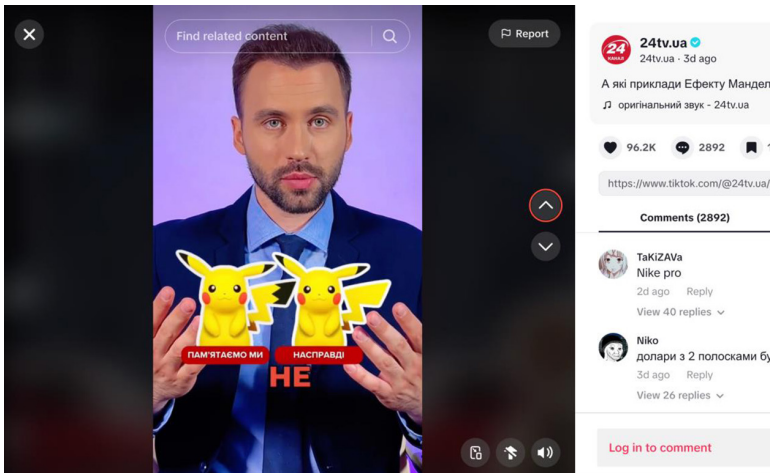
Videos

⁷⁰ Popularity of social networks and opportunities for brands. How humanity interacts with digital technologies - the Digital 2024 report <https://mediamaker.me/yak-lyudstvo-vzayemodiye-z-czyfrovymy-tehnologiyamy-zvit-digital-2024-8566>

⁷¹ How Ukrainian media use TikTok: 5 national and regional editions - about interesting formats, monetization and creativity <https://mediamaker.me/ukrayinski-media-v-tiktok-3790/>

As of summer 2024, Radio Liberty on TikTok has 120,000 followers and 5 million likes, while Ukrainska Pravda (UP) has reached nearly 140,000 followers but significantly fewer likes—2.2 million. To retain their audience on TikTok, many editorial teams are forced to play by the rules of this social network, which means deviating from traditional journalism and publishing entertaining content, as is done by the editorial team of Kanal 24.⁷²

Entertaining videos on the Kanal 24 TikTok account



Regional publications also receive millions of views on TikTok by publishing exclusive content about the consequences of Russia's armed aggression against Ukraine—this is notably done by the editorial teams of the Kharkiv publications Mediaport and Nakypilo. However, million-view counts on their accounts are more of an exception than a rule. Most videos garner only a few hundred or thousands of views, and no one is prepared to predict how TikTok's algorithms will perform during the next publication.

With the growing influence of TikTok on the information space, researchers and government officials are raising more questions about the

⁷² TikTok Channel 24 <https://www.tiktok.com/@24tv.ua>

risks associated with this Chinese platform. ByteDance, the operator of TikTok, has been accused of unauthorized data collection and transmission to the Chinese government, as well as promoting narratives that reflect the values of authoritarian societies, thereby attacking democratic values.

Back in 2020, TikTok was banned in India, which at the time was the leading country by the number of users (200 million), and in the United States, TikTok is viewed as a threat to national security. In 2024, President Biden signed an order to block TikTok if the Chinese continue to maintain control over the application.⁷³

For Ukrainian editorial teams, many of which receive Western funding in the form of international technical assistance or are funded directly by the U.S. government, like Radio Liberty, the use of TikTok as an undesirable application may soon diminish. Currently, Ukrainian researchers are studying how TikTok has become one of the key platforms, alongside Telegram, for the spread of disinformation and Russian propaganda.⁷⁴ Disinformation is often targeted at the most sensitive societal issues, such as mobilization questions in the summer of 2024. Specifically, officials have identified over 2,000 accounts on TikTok created as part of a single Russian information operation using the hashtag #ценомояукраїна, aimed at discrediting the actions of the TRSSK and mobilization efforts in Ukraine.⁷⁵

⁷³ Biden signed a ban on TikTok. The company assessed this as an affront to freedom of speech

<https://netfreedom.org.ua/article/bajden-pidpisav-zaboronu-tiktok-v-kompaniyi-ce-ocinili-k-znevagu-svobodi-slova>

⁷⁴ TikTok has become a new mouthpiece of betrayal <https://texty.org.ua/articles/109804/tik-tok-staye-nebezpechnym-rosijska-propahanda-vykorystovuye-socialnu-merezhu-yak-element-vijny-proty-ukrayiny/>

⁷⁵ In TikTok, a network of profiles created to discredit mobilization and TCC was discovered

<https://armyinform.com.ua/2024/08/02/u-tiktok-vyavyly-merezhu-profiliv-stvorenyh-dlya-dyskredytaciyi-mobilizaciyi-ta-tczk/>

Streaming Platforms in Ukraine: Rapid Development and Monetization

The global COVID-19 pandemic has provided a new impetus for the development of streaming platforms—viewer habits changed for two years as content consumption shifted from cinemas to private homes, and remote learning became the norm. Key factors in the growth of streaming platforms also included advancements in digital technology, increased access to high-speed internet, and the personalization of user preferences.

Currently, both Western and domestic streaming services operate in Ukraine. In 2016, Netflix entered the Ukrainian market as one of the largest global players, developing the Ukrainian-language content segment. However, during the first two years of its operation in Ukraine, Netflix failed to reach the milestone of 100,000 Ukrainian subscribers.⁷⁶

Among local leaders offering a wide range of content, including movies, series, TV channels, audiobooks, and educational courses, Megogo, Sweet.tv, Volia TV, Kyivstar TV, Vodafone TV, and Takflix stand out. In 2022, following SCM's exit from the media business, the streaming platform Oll.tv—owned by Rinat Akhmetov's media group—closed after ten years⁷⁷ of operation. Some players have carved out a narrow niche; for example, Takflix positions itself as an online cinema for Ukrainian films, aiming to «make Ukrainian cinema legally accessible» and «encourage viewers to watch quality Ukrainian content.»

Competition among domestic platforms with Western ones, primarily Netflix and YouTube, has forced the former to invest in acquiring licenses—thus, Megogo became the owner of licenses for sporting events, including national and world football championships, while Netflix invests in creating its own content. The first series on Netflix for Ukraine was «First Days,» about the Russian invasion of Ukraine in 2022⁷⁸, and the list of pro-

⁷⁶ The number of Netflix users in Ukraine according to the results of 2017 became known

<https://nachasi.com/news/2018/01/27/netflix-in-ukraine/>

⁷⁷ The National Council canceled the licenses of «Media Group Ukraine»: what employees say about it

<https://suspiilne.media/262881-nacrada-anuluvala-licenzii-media-grupi-ukraina-so-pro-ce-kazut-spivrobotniki/>

⁷⁸ 4 million hours watched Ukrainian content on Netflix in the first half of the year
<https://ms.detector.media/internet/post/33750/2023-12-14-4-mln-godyn-pereglyadaly-ukrainskyy-kontent-na-netflix-u-pershomu-pivrichchi/>

duced films and series has continuously expanded. The main monetization models for streaming platforms remain digital subscriptions (5-10 dollars per month), while additional revenue comes from integrating advertising into content and one-time payments for specific premium content items.

Meanwhile, the largest streaming platform in Ukraine is YouTube, which ranks among the three most popular services for Ukrainians. According to OPORA data, from 2022 to 2024, the ranking of the most popular social networks in Ukraine has remained virtually unchanged: it is led by Telegram (78.1%), YouTube (59.5%), and Facebook (44.6%).⁷⁹

Live broadcasts of Ukrainian TV channels, such as Suspilne Sport, are duplicated on YouTube—during the 2024 Olympics in Paris, streams of sporting events featuring Ukrainian athletes surpassed 150,000 viewers simultaneously watching the sporting event.

The YouTube ecosystem has evolved in recent years to the point where live streams have become a key format for the mass audience. Through live streams, users gain access to exclusive content, and these streams are quickly launched to comment on any significant events. Additionally, with the help of a large audience, content creators conduct fundraising campaigns for military units, hospital reconstruction, and other important social causes. The presence of QR codes for donations during high-viewership streams has become a common practice among digital content creators.

YouTube's business model is built on advertising and maximizing user retention on its platform through recommendations—this is how most tech platforms currently operate. However, tech platforms, including YouTube, offer users a false choice based on the principle of «pay or accept ads,» which is increasingly discussed as a violation of users' digital rights.⁸⁰ The amount of intrusive advertising on tech platforms has increased significantly in recent years, allowing tech giants to earn more. The excessive advertising encourages some users to opt for paid versions of services, such as YouTube Premium, which eliminates ads every few minutes of video watching, with the subscription costing 99 hryvnias per month in Ukraine.












⁷⁹ Telegram, YouTube or TikTok: where do Ukrainians get news
https://www.oporaua.org/polit_ad/telegram-youtube-chi-tiktok-zvidki-ukrayinci-diznayut-sya-novini-25308

⁸⁰ Meta cannot force users to pay for data protection
<https://netfreedom.org.ua/article/meta-ne-mozhe-zastavlyati-yuzeriv-platiti-za-zahist-danih-vvazhayut-v-edpb>

The development of Ukrainian-language YouTube has been one of the most notable phenomena in the Ukrainian online space over the past 5-6 years. Western experience shows that developing a YouTube channel is a profitable investment if your audience starts to grow and reaches hundreds of thousands, ideally millions, of subscribers. In developed economies, YouTube monetization occurs much more effectively than in poorer societies, as the purchasing power of the audience determines the value of the advertising that the platform pays to content creators. For instance, in the United States, YouTube pays more than 11 euros for 1,000 ad views, while in Ukraine, this figure is less than 1 euro.⁸¹

How much they earn from advertising on YouTube

WHAT IS THE AVERAGE COST OF A THOUSAND AD DISPLAYS (CRM) ON YOUTUBE IN DIFFERENT COUNTRIES?

Place	Name of the country	Average CRM (euro)
1	 USA	11.04
2	 Australia	9.05
3	 Switzerland	8.85
4	 Norway	7.49
5	 New Zealand	6.81
6	 Canada	6.55
7	 Denmark	6.54
8	 Great Britain	6.31
9	 Germany	6.04
10	 Netherlands	5.83
59	 Ukraine	0.83

SOURCE: IS THIS CHANNEL MONETIZED

⁸¹ Fewer bots and war fatigue: do YouTubers earn big money <https://www.epravda.com.ua/publications/2024/08/8/717722/>

Embedded advertising in YouTube videos is just one of the direct monetization methods for content creators. Once a channel gains recognition and a loyal audience, creators target advertising integrations and encourage their followers to make donations—either one-time contributions or monthly subscriptions. The cost of such advertising integrations, or simply advertising during video recordings, can reach tens of thousands of hryvnias, depending on the channel's audience.

Many beginners in Ukrainian YouTube are inspired by the success stories of Western vloggers who earn tens of millions of dollars within a calendar year. The leader among American vloggers is MrBeast, with 309 million subscribers as of August 2024.⁸² Often, the most popular vloggers offer their subscribers primarily entertaining content associated with clickbait in video format. MrBeast organizes challenges and competitions, with the motivation being straightforward—money. However, there are so many users on YouTube that producing meaningful content can also yield results.

Among the most popular channels in Ukraine, which have hundreds of thousands and sometimes millions of subscribers, are those of Ukrainian media (TSN, Novy Channel, 24 Channel, Radio Liberty, Ukrainian Truth), investigative journalists (Bihus.info), entertainment shows (Dizayn Studio, Ukraine's Got Talent, Telebachennya Toronto), and explanatory channels that promote history (History Without Myths, named after T.G. Shevchenko). Since the onset of the invasion, military units and military media channels (Third Assault Brigade, Army TV) have also gained prominence.

In many Ukrainian editorial offices, the development of YouTube is a significant priority that requires the services of videographers, regular filming of new stories, experimenting with genres, using professional equipment, and understanding YouTube algorithms, as the number of views can fluctuate significantly within a single channel.

The rapid development of technology, particularly artificial intelligence (AI), presents new opportunities for editorial teams worldwide. The use of AI can significantly reduce the time required for video production and allow experimentation with new forms of visual content.

⁸² MrBeast YouTube Channel <https://www.youtube.com/@MrBeast>

Ukrainska Pravda (UP) uses AI to generate headlines for YouTube⁸³, while some local media, as an experiment, have recorded news segments featuring AI-generated presenters.

In video production, AI assists with automating editing, recognizing faces and objects, automatically generating subtitles, and translating. Some go further and generate videos based on text or mimic human voices for video narration, freeing up a substantial amount of effort for journalists. However, such experiments can attract criticism, as current AI algorithms are still imperfect, and audiences can recognize «fakes.» Transparent rules for using AI and informing users about it should be prerequisites for any AI-related experiments.

Modern digital technologies play an invaluable role in the development of the information space, but it is always essential to remember the purpose of using these technologies. Artificial intelligence enables the easy creation of deep fakes, the publication of which can influence political processes worldwide. The use of algorithms by social networks and tech platforms like YouTube and Facebook by authoritarian governments has become a new area of research for specialists in countering disinformation. Today, Ukraine is at the center of such external influences. Research by the Texty.org.ua team in 2023 found ⁸⁴that YouTube, through its «recommendations» feature, promotes content that poses threats both to individual viewers and to national security in Ukraine.

⁸³ Man as a guide, authorship and fact-checking. How Ukrainian media, organizations and state structures use AI <https://mediamaker.me/lyudynayak-oriyentyr-avtorstvo-j-faktcheking-yak-ukrayinski-media-organizacyyi-ta-derzhstruktury-vykorystovuyut-shi-8438/>

⁸⁴ The spiral of addiction. How YouTube algorithms promote conspiracy and propaganda <https://texty.org.ua/d/2023/youtube-recommendations/>

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AFTERWORD

This media landscape emerges during a difficult and tragic period for Ukraine—amid the full-scale invasion of its territory by the Russian army. The war has left its mark on the activities of all societal institutions, and journalism is no exception. We have attempted to illustrate how Ukrainian media cope with their primary task: to inform the audience reliably, thoroughly, and comprehensively about the most important events on the front lines and in the rear; the challenges and problems they face; and how they address these issues.

A distinct area of focus is the counteraction against the disinformation efforts of the Russian propaganda machine. It is essential to understand both the pathways through which hostile propaganda spreads and the typical techniques and markers that allow false messages to be identified. It has become a truism that the best method for combating disinformation is meticulous fact-checking of all information released by journalists. This is what sets professional journalism apart from blogging, and it is precisely why it remains necessary for society.

The war has also caused structural changes in media operations. The informational function has taken center stage—people genuinely need information to navigate the complex and rapidly changing situation. Recreational and entertainment content has receded, probably temporarily, as the audience is less interested for understandable reasons. Another trend has been the significant rise in the informational role of Telegram and YouTube channels. This is due to both their quick response to events and their easy accessibility. The comparatively low trust of the Ukrainian population in professional media has also played a role. Unfortunately, the authorities continue to cling to the «Unified News» marathon, which articulates the official viewpoint and has low audience ratings.

An important segment of Ukrainian media is the printed press. It is crucial to assess and clarify the reasons behind the decline in the number and circulation of newspapers and magazines. Problems related to reduced advertising, difficulties in distribution, and shortages of newsprint are not just noted but also solutions to overcome the crisis and prospects for development are proposed.

It should be noted that a specific subset of Ukrainian media has emerged—frontline newspapers. Their significance has increased because they report on the problems of specific territories, allowing readers to learn what is happening on «the neighboring street.» Additionally, in conditions of power outages and lack of communication, this form of media has become more accessible than others.

This media landscape also analyzes new trends in the development of digital media. In particular, the role of streaming platforms has increased in Ukraine. The analysis of the use of artificial intelligence is particularly interesting.

As the research shows, despite the difficult and extreme conditions, Ukrainian journalists, overall, manage to fulfill their task of qualitatively informing Ukrainian society about the tragic events of today, countering misinformation and propaganda, and promptly and reliably covering and analyzing all topics relevant to the domestic audience.

Analytical report

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