



MEDIA CONSUMPTION SURVEY IN UKRAINE 2018

This publication was produced with support of the American people through the United States Agency for International Development's U-Media Project, which is implemented by Internews. The views of InMind company expressed in this publication do not necessarily reflect the views of the United States Agency for International Development, the United States Government or Internews Network.

NATIONAL SURVEY

June 2018









CONTENTS

Goals and objectives of the study	3
Research design	4
Key results	5
Media consumption	8
Trust to media	27
Media competence	33
Awareness of reforms	44
Socio-demographic profile	52





Goals and objectives of the study

- To define the attitude of the general public to the media
- To measure levels of satisfaction with regional, national and Russian media of all types
- To evaluate preferences regarding different media types
- To evaluate the consumption levels of different media
- To evaluate levels of trust in different media types
- The population's opinions on the competence of the media
- Assessment of the population's awareness and understanding of reforms through media coverage





RESEARCH DESIGN

Method F2F

Target audience

Male/Female 18-65

Fieldwork

Wave 2015: May – June Wave 2016: May – June Wave 2017: May – June Wave 2018: May – June

Geography

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



Sample size

Representative part ~ 1,640 interviews/wave Total sample – 4,048 interviews/wave, of which 300 interviews in each of 12 regions: Kyiv, Vinnytsia, Dnipro, Donetsk, Zaporizhzhia, Lviv, Mykolayiv, Odesa, Poltava, Sumy, Kharkiv, Kherson





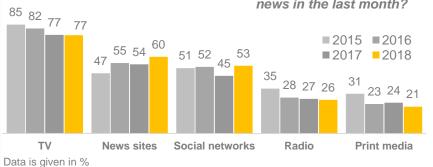
Key Findings (1)

MEDIA CONSUMPTION

The TV audience share has not changed since the previous year. As before, TV remains the number one source of news for Ukrainians. The online media audience has grown significantly, the use of both news sites and social networks has increased.

Despite the ban on access to a number of Russian online resources and, consequently, a decrease in the number of users of the Russian social networks last year, digital media strengthened its position in the media. The print media audience continues to decrease.

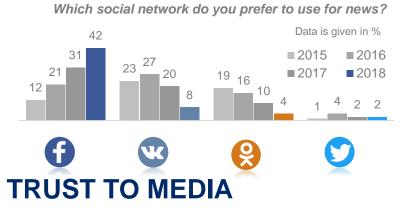
As before, the popularity of TV among older viewers (46+) greatly contributes to its leading position in the media consumption totals. As usual, residents in the western regions comprise the largest TV audience among all regions of Ukraine. 1+1 and Inter remain the most popular TV channels in the country.



Digital (internet) media remains the most popular news source among younger audiences, with internet users aged 18-45 years preferring news sites, and youth (up to 35 years old) – social networks.

As before, most consumers prefer news aggregators (like ukr.net) over other digital media outlets.

The social media consumption patterns keep changing – the Facebook audience is gradually growing, while the Russian social networks have lost their leading positions.



The levels of trust in both national and regional media have increased in all media categories. This trend was observed in all regions of Ukraine. Public trust in Russian media remains low - in fact, levels of trust in Russian TV, radio and press continue to decrease year in and year out since 2014.

The main reasons for not trusting the media include unreliability of information and biased coverage of an issue (presentation of only one point of view). **To what extent do you trust the ... news source?** (the percentage of respondents who trust or rather trust the news source)

	2015	2016	2017	2018
Trust in	national m	ass media	1	
TV	61%	58%	54%	61%
Online	47%	52%	48%	58%
Print	34%	31%	28%	39%
Radio	39%	36%	33%	33%

Trust in regional mass media

TV	51%	52%	46%	56%
Online	40%	45%	42%	52%
Print	36%	33%	31%	34%
Radio	35%	32%	30%	35%

Trust in Russian mass media

TV	4%	3%	6%	4%
Online	8%	7%	10%	10%
Print	3%	2%	6%	4%
Radio	3%	2%	6%	3%

Which type of media have you used for news in the last month?





Key Findings (2)

In all media categories, except print media, respondents prefer national media outlets to regional ones. However, the study recorded an increase in the numbers of regional TV viewers and Internet users.

TV AUDIENCE

Which TV channels have you preferred for news in the last month? (for TV viewers)

	2015	2016	2017	2018
TV Consumption				
National	99%	99%	99%	99%
Regional	43%	44%	39%	45%
Russian	12%	7%	5%	6%

National TV channels: In all oblasts of Ukraine, over 95% of TV viewers prefer national TV channels to regional ones.

Regional TV channels: The regional TV audience has increased, mainly in the eastern regions (Zaporizhzhia, Dnipropetrovsk, Kharkiv and Luhansk oblasts). Lviv (68%), Sumy (68%) and Zaporizhzhia (65%) oblasts became the leaders in regional media consumption.

Russian TV channels: As before, the syrvey shows the highest levels of the Russian TV consumption in the eastern and southern regions (8-10%).

DIGITAL MEDIA AUDIENCE

Which news sites have you visited in the last month? (for digital media users)

	2015	2016	2017	2018
Internet Consumption				
National	93%	91%	90%	92%
Regional	28%	31%	31%	42%
Russian	25%	14%	12%	14%

National online media: The survey reveals the lowest national online media consumption levels in the southern region – in Odesa (79%) and Mykolaiv (77%) oblasts.

Regional online media: Similar to TV consumption, growing consumption of regional online media was mainly recorded in eastern regions (Zaporizhzhia, Dnipropetrovsk, and Donetsk oblasts). The levels of the regional online media consumption also increased in Sumy and Lviv oblasts.

Russian online media: Russian online media are mainly popular among residents of Odesa (54%), Zaporizhzhia (27%) and Donetsk (26%) oblasts.

PRINT MEDIA AUDIENCE

Which print media outlets have you preferred for news in the last month? (for the print media audience)

2015 2016 2017 2018

Print Media Consumption

National	61%	55%	50%	58%
Regional	63%	70%	68%	69%
Russian	7%	3%	1%	3%

National print media: National print media consumption levels increased during the past year. The highest levels of the Ukrainian press consumption were seen in the northern oblasts (83%).

Regional print media: Regional print media is more popular than national print media. More than half of the print media audience in all regions of Ukraine prefers regional media.

Russian print media: low popularity.

RADIO AUDIENCE

Which radio stations have you preferred for news in the last month? (for the radio audience)

	2015	2016	2017	2018
Radio Consumption				
National	87%	90%	93%	92%
Regional	27%	28%	25%	27%
Russian	11%	4%	1%	5%

The radio audience prefers national stations to regional ones. However, regional radio stations are quite popular among listeners in Lviv (83%), Vinnytsia (60%), Odesa (52%) and Sumy (45%) oblasts. Russian radio consumption increased this past year but is still very low (5%).



Key Findings (3)

MEDIA LITERACY

Accuracy and reliability of information remain the main criteria for evaluating news.

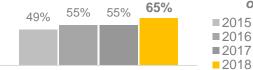
What general requirements for news do you have? (the most important)

	2015	2016	2017	2018
Credibility / reliability	46%	43%	43%	44%
Objectivity	20%	22%	24%	19%
Timeliness	10%	12%	10%	15%
Completeness of coverage	8%	8%	9%	10%
Accuracy	8%	10%	8%	8%
Separation of facts and comments	6%	6%	5%	5%

Compared to previous years' findings, more people became aware of sponsored (jeansa) journalism in 2018 - awareness rose from 55% in 2017 to 65%. However, just over half of those who are aware of the existence of sponsored materials said they were able to distinguish real news from paid journalism.

The 2018 survey recorded an increase in the number of respondents using a critical eye when assessing news quality and accuracy. Most focused on news sources (28%) and the presence of a balance of views (29%). Meanwhile, a significant part of the audience still judges the accuracy of news coverage based on their own intuition or personal preferences (26%).

Do you know about sponsored / "special request" materials in the media, as well as hidden advertising presented in the form of



ordinary messages? 2015

■2016 2017

Yes. I am The continuing trend towards a decrease in the number of respondents who rate paid journalism as a deeprooted problem in Ukrainian media has stabilized. The percentage of people who consider paid journalism an important issue, but have no idea how to solve it, has increased since last year. Residents of western regions demonstrated the highest level of awareness of this issue among all regions of Ukraine (44%).

In your opinion, how relevant is the problem of paid journalism / sponsored materials in the media?						
2015	9%	55%	33%	<mark>3%</mark>		
2016	11%	56%	29%	<mark>3%</mark>		
2017	8%	61%	27%	<mark>3%</mark>		
2018	<mark>6%</mark>	58%	33%	<mark>3%</mark>		

Hard to say

Not relevant at all

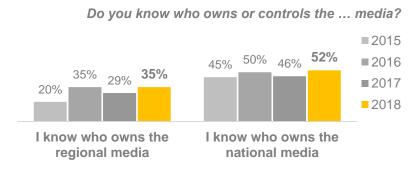
It is relevant, but I have no idea how to address it

It is very relevant and I do a lot to solve it

Survey respondents see TV as the main source of sponsored content.

Most respondents (65%) support the idea of banning political advertising on TV.

The percentage of respondents who are aware of who owns regional and national media outlets has increased since last year. As before, about a third of respondents believe that knowing who owns the media is important.



The survey found an increase in levels of public awareness of energy, healthcare and decentralization reforms. However, compared to the previous year's findings, fewer respondents were aware of land reform efforts.

TV remained the main source of news covering progress in the implementation of these reforms (especially for residents of western regions).







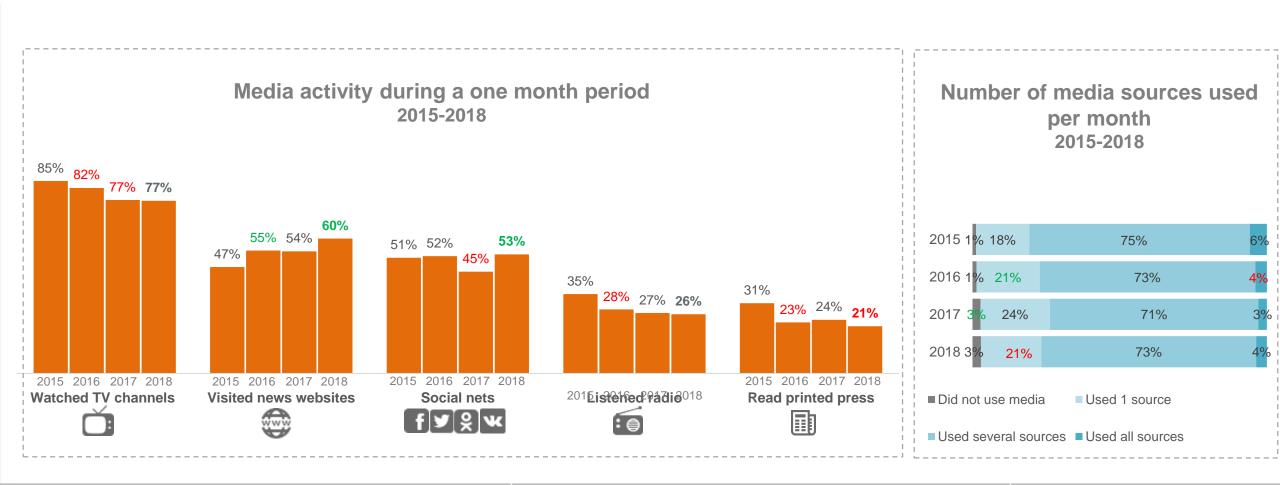
MEDIA CONSUMPTION





Media Activity

After having fallen steadily during each of the preceding three years, the TV audience share finally stabilized. As before, television remains the number one source of news, despite the rapid growth in the number of digital media users – the survey shows an increase in the number of people who prefer news websites. After falling in 2017, the share of social media news consumers has returned to 2016 levels. There has been a further decrease in the print media audience.



Question: Please tell me which media you have used during the last 30 days to receive news?





Media types: Regional VS National VS Russian

After falling the previous year, the consumption of regional TV returned to 2016 levels. In addition, consumption of regional digital media increased from 31% to 42%. The consumption of print media also increased, mainly owning to the growth of the Ukrainian print media audience.

		TV	Websites	Radio	Press
Regional	2015 2016 2017 2018	43% 44% 39% 45%	28% 31% 31% 42%	27% 28% 25% 27%	63% 70% 68% 69%
National	2015 2016 2017 2018	99% 99% 99% 99%	93% 91% 90% 92%	87% 90% 93% 92%	61% 55% 50% 58%
Russian	2015 2016 2017 2018	5%	25% 14% 12% 14%	11% 4% 1% 5%	7% 3% 1% 3%
Sample size (Consumers of this me		2015, N=1404 (85% of all TA) 2016, N=1350 (82% of all TA) 2017, N=1271 (77% of all TA) 2018, N=1260 (77% of all TA)	2015, N=777 (47% of all TA) 2016, N=895 (55% of all TA) 2017, N=894 (54% of all TA) 2018, N=984 (60% of all TA)	2015, N=579 (35% of all TA) 2016, N=465 (28% of all TA) 2017, N=443 (27% of all TA) 2018, N=432 (26% of all TA)	2015, N=513 (31% of all TA) 2016, N=371 (23% of all TA) 2017, N=393 (24% of all TA) 2018, N=344 (21% of all TA)

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

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





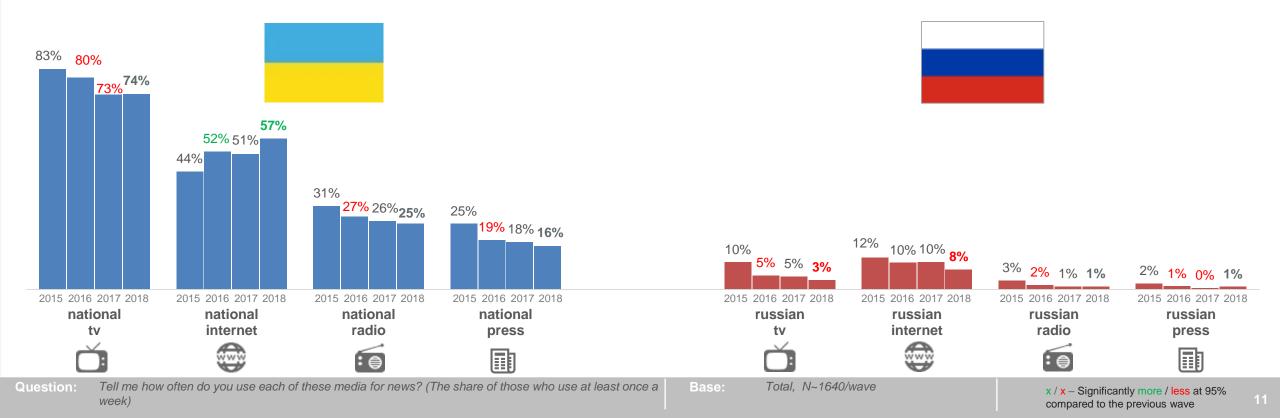
Weekly usage of various media

The majority of the population gets news from Ukrainian media outlets. There has been an increase in weekly consumption of Ukrainian online media.

Russian TV and online news are gradually losing their shares – compared to the previous year, there has been a significant decrease in the number of people checking news on Russian media at least once a week.

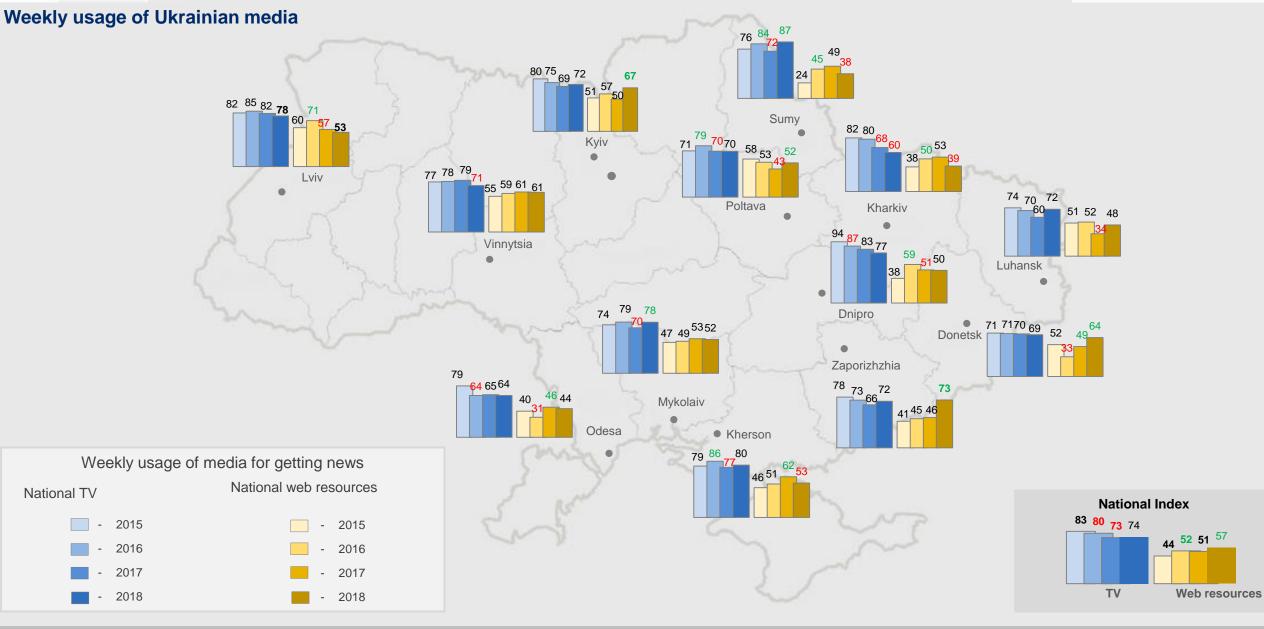
Weekly usage of media for getting news

2015-2018





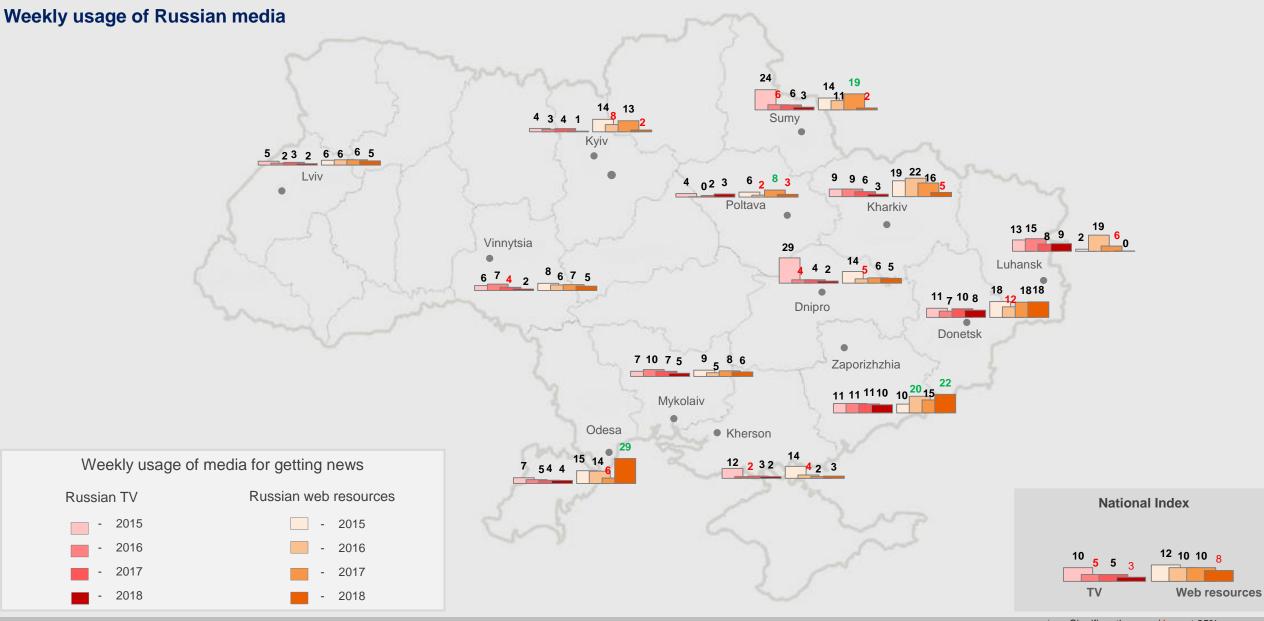




x / x – Significantly more / less at 95% 12 compared to the previous wave











Level of satisfaction with news presentation on TV

Compared to previous years, there has been a decrease in the number of people satisfied with the completeness of information provided by Ukrainian TV channels. TV viewers also give lower scores for the importance and relevance of the content broadcast by national TV channels.

However, the survey shows no significant changes in how viewers feel about the reliability and objectivity of information provided by TV.

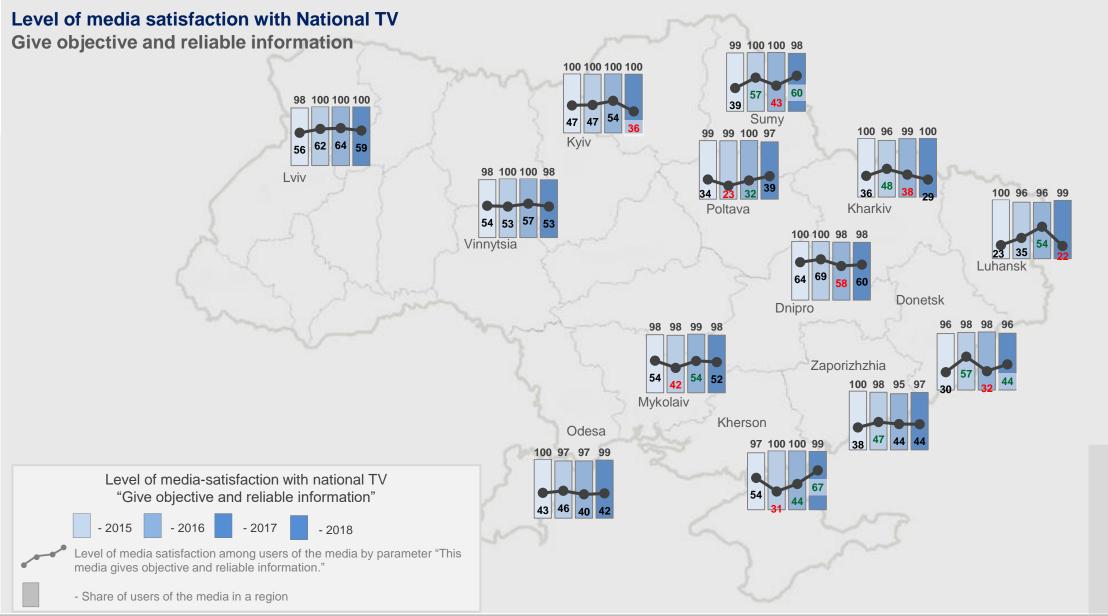


Satisfaction with news presentation on TV

Share of those who completely or rather agree that		Regional	National	Russian	
2015 Broadcasts come out with periodicity convenient for me 2017 2018		71% 73% 72% 68%	76% 77% 73% 72%	48% 49% 53% 45%	
Information is being given promptly	on is being given promptly 2015 65% 2016 68% 2017 68% 2018 67%		70% 72% 72% 68%	40% 48% 54% 45%	
Given information is important for me	2015 2015 2017 2018	68% 62% 64% 61%	67% 64% 63% 57%	43% 47% 44% 33%	
Given is full, detailed information Give objective and reliable information Sample size (Consumers of TV news)		54% 57% 56% 53%	53% 54% 56% 51%	35% 28% 38% 32%	
		53% 57% 49% 54%	49% 52% 49% 49%	38% 26% 32% 25%	
		2015, N=605 (37% of all TA) 2016, N=597 (36% of all TA) 2017, N=496 (30% of all TA) 2018, N=568 (35% of all TA)	2015, N=1393 (85% of all TA) 2016, N=1333 (81% of all TA) 2017, N=1256 (76% of all TA) 2018, N=1244 (76% of all TA)	2015, N=162 (10% of all TA) 2016, N=92 (6% of all TA) 2017, N=69 (4% of all TA) 2018, N=78 (5% of all TA)	
Question: Please evaluate how much you agree with following statements about NEWS Base: Consumers of respective media x / x - Significantly more compared to the previored of the prev					



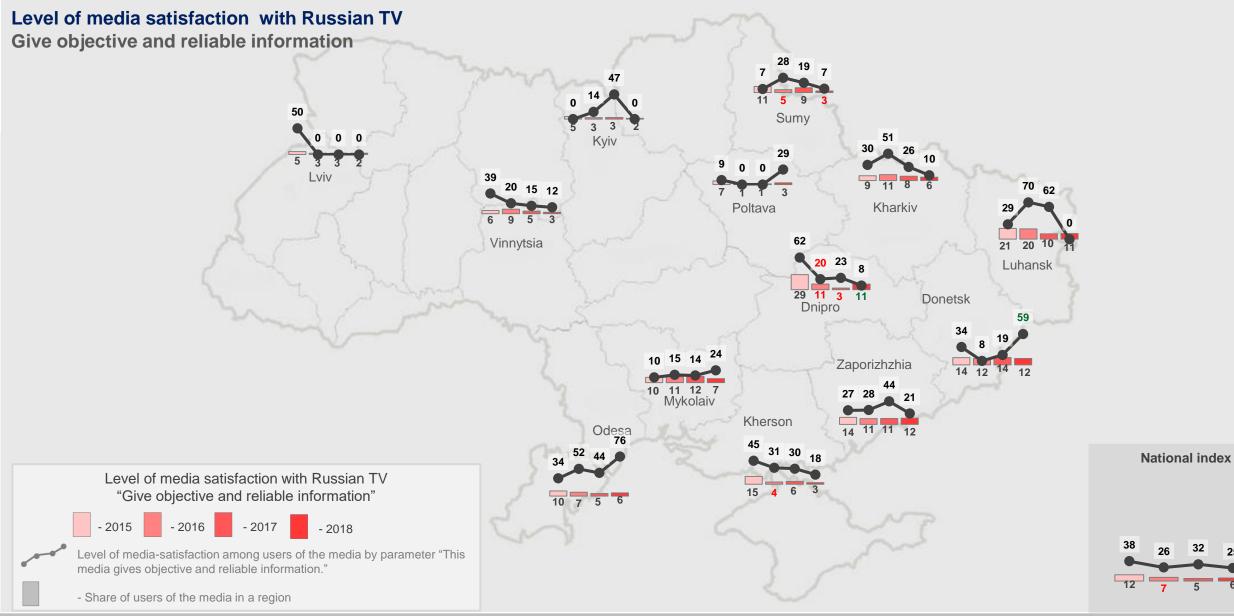




National Index











Level of satisfaction with news presentation on the web

Overall, the audience's level of satisfaction with the content published by digital media outlets remained unchanged. However, compared to the previous years, there has been a decrease in the number of respondents who indicate that the regional digital media outlets publish important and relevant information.

				,
Share of those who completely or rat agree that	her	Regional	National	Russian
Convenient to use	2015	87%	88%	65%
	2016	81%	86%	74%
	2017	86%	83%	74%
	2018	81%	85%	61%
Easy to find information I need	2015	81%	82%	59%
	2016	80%	81%	63%
	2017	80%	77%	65%
	2018	75%	79%	60%
Information is being given promptly	2015	78%	80%	55%
	2016	73%	82%	61%
	2017	79%	77%	62%
	2018	74%	78%	55%
Given information is important for me	2015	74%	76%	48%
	2016	70%	71%	41%
	2017	72%	68%	50%
	2018	65%	67%	41%
Detailed, full information is provided	2015	63%	68%	37%
	2016	60%	70%	32%
	2017	61%	64%	49%
	2018	61%	61%	37%
Gives objective and reliable information	2015	63%	65%	31%
	2016	65%	65%	22%
	2017	65%	59%	32%
	2018	61%	57%	28%
Sample size (Internet news users)	2015, N=218 (13% of all TA) 2016, N=277 (17% of all TA) 2017, N=281 (17% of all TA) 2018, N=410 (25% of all TA)	2015, N=722 (44% of all TA) 2016, N=812 (50% of all TA) 2017, N=805 (49% of all TA) 2018, N=901 (55% of all TA)	2015, N=197 (12% of all TA) 2016, N=122 (7% of all TA) 2017, N=104 (6% of all TA) 2018, N=133 (8% of all TA)

Satisfaction with news presentation on the web

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

Consumers of respective media

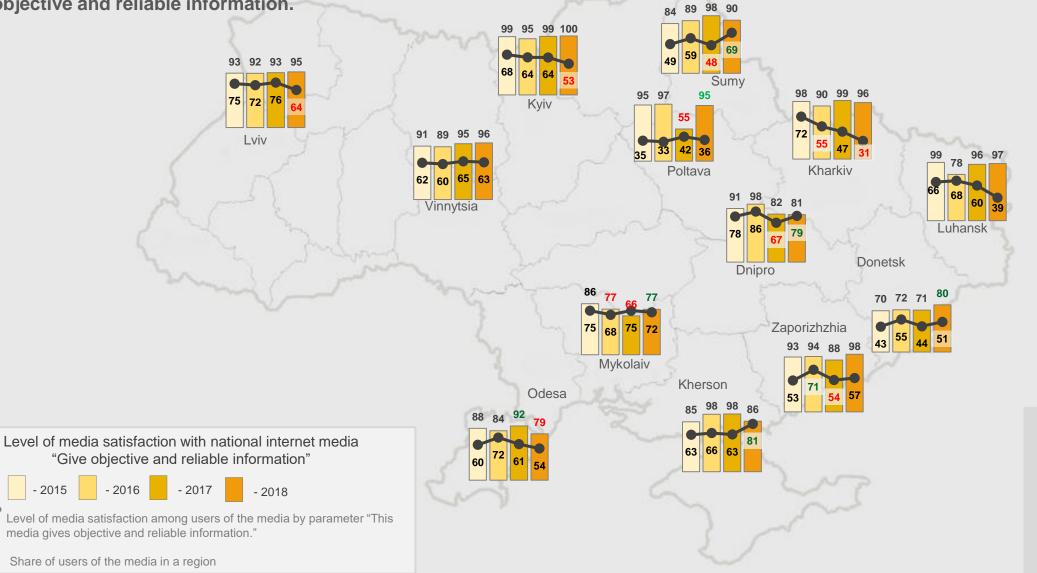
Base:





Level of satisfaction with national internet media.

Give objective and reliable information.



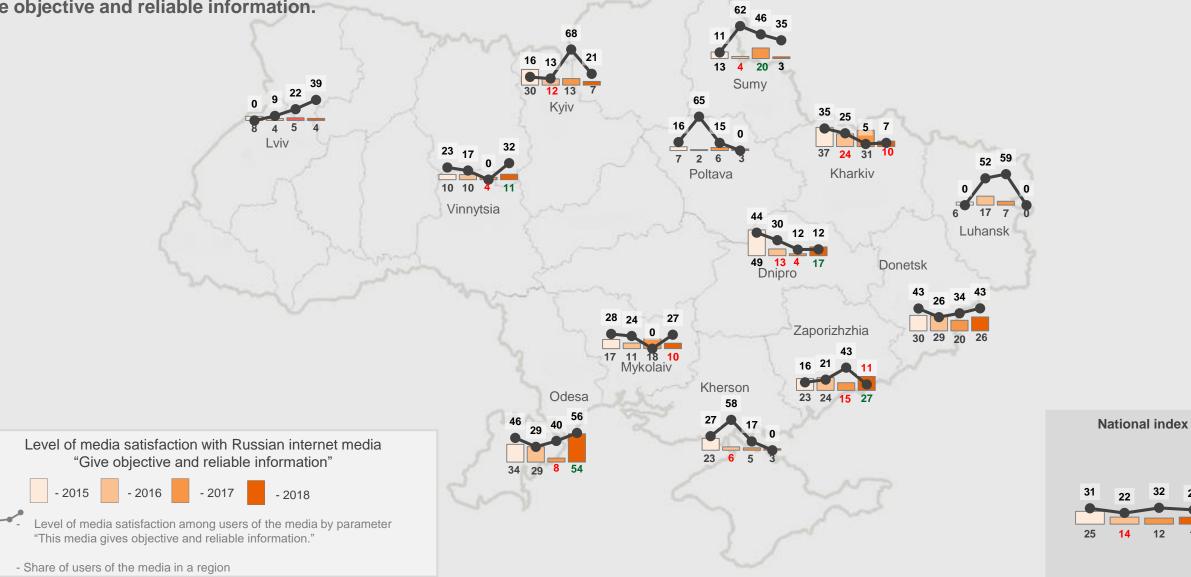
National index





Level of media satisfaction with Russian internet media.

Give objective and reliable information.



28

14





National media ratings

		Т	V	(Ť	
	2015	2016	2017		2018	
1+1	63%	62%	57%			59%
Inter	56%	47%	43%		419	%
STB	34%	38%	36%		33%	
ICTV	31%	28%	33%		33%	
Ukraine TRC	18%	22%	27%		28%	
112.Ukraine	14%	15%	15%		18%	
Novyi	12%	18%	15%		15%	
5 th channel	13%	8%	7%	8%	6	
2+2	6%	4%	4%	6%)	
HTH	5%	6%	7%	5%)	
NewsOne	0%	0%	2%	3%		
First National	3%	4%	2%	3%		
24 channel	6%	4%	5%	3%		
K-1	1%	1%	2%	2%		
TET	3%	3%	2%	2%		
Espresso.TV	1%	1%	1%	2%		

決 Internet 🌚

	2015	2016	2017	2018
AGGREGATORS Ukr.net	28%	34%	35%	28%
Yandex	16%	19%	16%	8%
UNIAN (unian.net)	7%	6%	4%	7%
SOC NETS	1%	7%	8%	8%
Google	0%	0%	14%	3%
YouTube		0%	2%	2%
Vkontakte	4%	9%	5%	2%
Twitter	0%	4%	0%	1%
Cenzor.net	t 0%	0%	2%	13%
1+1 (1plus1.ua)	9%	6%	7%	10%
Ukrainian News(mediaua.com.ua)	6%	3%	5%	9%
Fakty (fakty.ua)	- / -	5%	5%	8%
Korrespondent (korrespondent.net)		6%	8%	7%
Novosti.ua (novosti.ua)		4%	3%	7%
Obozrevatel (obozrevatel.com)		3%	3%	6%
Sobytiya (sobytiya.ua)	. , .	3%	3%	5%
Segodnya (Segodnya.net)		3%	4%	5%
Vesti (vesti-ukr.com)		3%	4%	4%
Ukrainian Pravda да (pravda.com.ua)	6%	6%	9%	4%
Podrobnosti (podrobnosti.ua)	3%	3%	3%	4%
Liga.netī		3%	4%	3%
Telegraf (telegraf.com.ua)		1%	0%	3%
Esspresso. TV (онлайн)) 3%	1%	2%	2%
Hromadske. TV (онлайн)) 4%	2%	3%	2%

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

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





National media ratings

			Pre	ess	
	:	2015	2016	2017 (2018
	Segodnya	28%	22%	30%	20%
	Vesti	36%	13%	22%	19%
	Fakty i kommentarii	14%	14%	15%	17%
	Argumenty i Fakty (Ukraine)	20%	21%	17%	16%
	Bul'var	9%	7%	6%	12%
	Ekspres	7%	14%	12%	9%
	Zerkalo nedeli	4%	4%	4%	7%
	Uriadovyi kur'ier	6%	1%	3%	4%
	Komsomolskaia pravda (Ukraine)	6%	8%	4%	4%
	Den	3%	3%	2%	4%
	Ukranian golos	2%	2%	3%	3%
	Korrespondent (magazine)	2%	2%	2%	3%
	Silski visti	2%	2%	0%	2%
	Vecherniy Kiev	2%	3%	2%	2%
				•••••••••••••••••••••••••••••••••••••••	

決 Radio 🗐

	2015	2016	2017	2018
Hit FM	21%	21%	25%	27%
Shanson	17%	18%	17%	19%
Avtoradio Ukraine	12%	13%	12%	17%
Lux FM	15%	15%	19%	16%
1st NRU (UR-1, NTRCU-1)	9%	8%	8%	13%
Piatnitsa	3%	8%	12%	13%
Nashe radio	19%	16%	13%	13%
Russkoe radio Ukraine	11%	10%	11%	12%
Retro FM	10%	10%	9%	9%
Kiss FM	10%	6%	10%	8%
Melodiia	11%	12%	8%	6%
Radio Rocks	4%	5%	5%	5%
Era FM	10%	9%	10%	4%
Europa Plus	7%	5%	4%	4%
Prosto radio	2%	2%	2%	3%
Promin	5%	3%	1%	2%
24 radio	4%	2%	2%	2%
Best FM	0%	1%	1%	2%

What are the three national editions you read most often?

N= 315 / 203 / 198 / 201 Consumers are a nation. printed media N=506 / 418 / 412 / 400 Consumers are generally national. radio stations What are the three nationwide radio stations that you are listening to the news most often?





Russian media ratings

	T	V	Č i
2015	2016	2017	2018
25%	19%	27%	24%
27%	24%	21%	24%
13%	26%	19%	19%
27%	27%	24%	16%
9%	9%	16%	12%
13%	22%	26%	12%
16%	8%	3%	11%
6%	2%	5%	8%
0%	0%	2%	4%
13%	11%	10%	4%
7%	9%	2%	4%
2%	1%	0%	3%
1%	0%	1%	2%
	25% 27% 13% 27% 9% 13% 6% 0% 13% 7% 2%	25% 19% 27% 24% 13% 26% 27% 27% 9% 9% 13% 22% 16% 8% 6% 2% 0% 0% 13% 11% 7% 9% 2% 1%	13% 22% 26% 16% 8% 3% 6% 2% 5% 0% 0% 2% 13% 11% 10% 7% 9% 2%

Internet 🝚

	2015	2016	2017	2018
Lenta.ru	8%	17%	19%	16%
Vesti.ru	9%	14%	10%	13%
M24.ru	5%	3%	6%	9%
Lifenews.ru	10%	4%	7%	6%
Yandex.ru	0%	0%	0%	6%
Gazeta.ru	5%	2%	3%	4%
Forbes.ru	5%	2%	3%	4%
Kommersant.ru	3%	4%	3%	4%
Newsru.com	3%	4%	3%	3%
Vedomosti.ru	3%	4%	2%	3%
Kp.ru	2%	1%	2%	2%
Izvestia.ru	2%	1%	4%	2%

What is the name of the three Russian TV channels whose news you see most often?

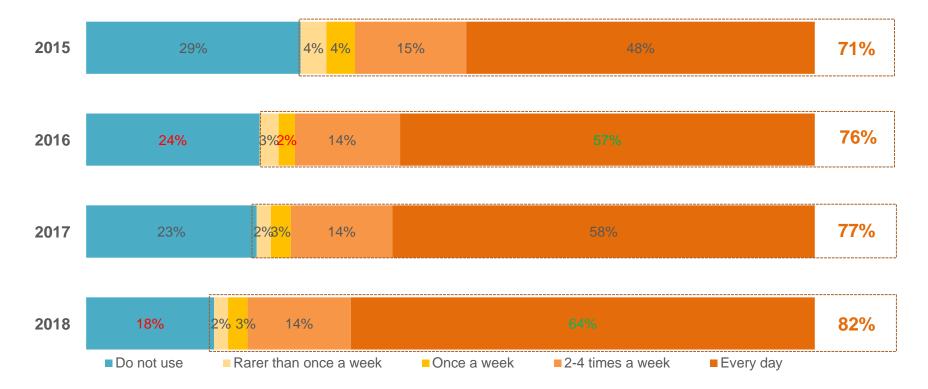
What is the name of the three Russian news sites that you visit most often?





Internet usage

The survey found an increase in the number of active internet users – 64% of respondents (compared to 58% last year) indicated that they used the internet every day.



Uses the internet:





Reasons for using the internet

As before, the majority of the internet users search the web to find the information they need. Respondents mentioned more types of online activities than they have in previous years. For example, there has been an increase in the number of the internet users who preferred messenger services for communicating, made online payments and online purchases, and watched online TV, videos, and news streams.

2015	2016	2017		2018				
48%	53%	55%						64%
41%	46%	46%					51%	
39%	48%	44%					47%	
47%	51%	48%					46%	
35%	40%	38%					45%	
30%	34%	38%					43%	
14%	21%	23%				32%		
18%	20%	27%			3	81%		
16%	18%	21%			22%			
16%	18%	17%		2	21%			
14%	18%	18%		18	%			
6%	7%	8%	9	9%				
7%	6%	8%	7%	%				
	48% 41% 39% 47% 35% 30% 14% 18% 16% 16% 14% 6%	48% 53% 41% 46% 39% 48% 47% 51% 35% 40% 30% 34% 14% 21% 16% 18% 16% 18% 14% 20% 16% 18% 6% 7%	20152016201748%53%55%41%46%46%39%48%44%47%51%48%35%40%38%30%34%38%30%34%38%14%21%23%18%20%27%16%18%17%14%18%18%6%7%8%7%6%8%	48% 53% 55% 41% 46% 46% 39% 48% 44% 47% 51% 48% 47% 51% 48% 35% 40% 38% 30% 34% 38% 14% 21% 23% 16% 18% 21% 16% 18% 17% 14% 18% 18% 6% 7% 8% 9	48% 53% 55% 41% 46% 46% 39% 48% 44% 47% 51% 48% 35% 40% 38% 30% 34% 38% 30% 34% 38% 14% 21% 23% 16% 18% 21% 16% 18% 17% 2 14% 18% 18% 18 6% 7% 8% 9%	48% $53%$ $55%$ $41%$ $46%$ $46%$ $39%$ $48%$ $44%$ $47%$ $51%$ $48%$ $47%$ $51%$ $48%$ $35%$ $40%$ $38%$ $30%$ $34%$ $38%$ $14%$ $21%$ $23%$ $18%$ $20%$ $27%$ $16%$ $18%$ $21%$ $16%$ $18%$ $17%$ $22%$ $14%$ $18%$ $18%$ $18%$ $6%$ $7%$ $8%$ $9%$	48% $53%$ $55%$ $41%$ $46%$ $46%$ $39%$ $48%$ $44%$ $47%$ $51%$ $48%$ $47%$ $51%$ $48%$ $35%$ $40%$ $38%$ $30%$ $34%$ $38%$ $30%$ $34%$ $38%$ $14%$ $21%$ $23%$ $32%$ $18%$ $20%$ $27%$ $31%$ $16%$ $18%$ $21%$ $22%$ $16%$ $18%$ $17%$ $21%$ $14%$ $18%$ $18%$ $18%$ $6%$ $7%$ $8%$ $9%$	48% $53%$ $55%$ $41%$ $46%$ $51%$ $39%$ $48%$ $44%$ $47%$ $37%$ $51%$ $48%$ $46%$ $37%$ $40%$ $38%$ $45%$ $30%$ $34%$ $38%$ $43%$ $14%$ $21%$ $23%$ $32%$ $18%$ $20%$ $27%$ $31%$ $16%$ $18%$ $17%$ $21%$ $14%$ $18%$ $18%$ $18%$ $6%$ $7%$ $8%$ $9%$

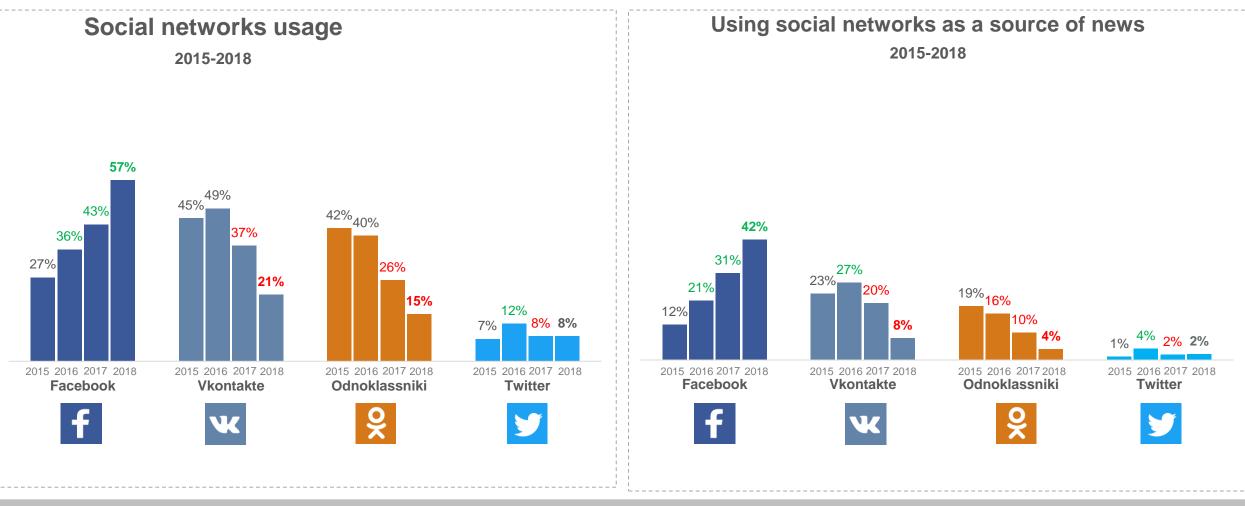




Social network usage

Since the official ban on access to a number of popular Russian internet resources and social networks in Ukraine last year, consumption of Russian social media (in particular, Vkontakte, Odnoklassniki) has decreased rapidly. Meanwhile, Facebook's audience has grown significantly – more than half of respondents confirmed having used Facebook at least once a month.

In addition, Facebook's position as a reliable news source is on the rise – the use of Facebook for news continues to grow.



Question: 1. Which social nets do you use at least once a month?

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



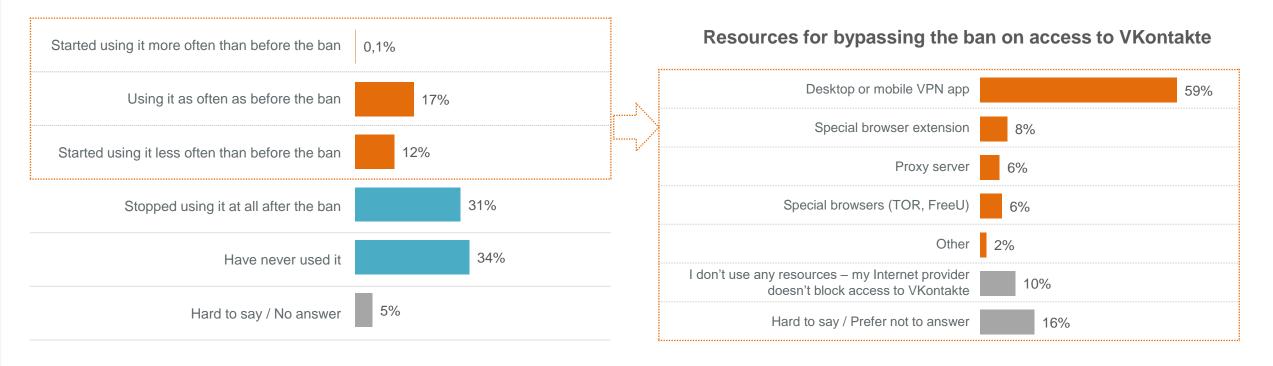


Public attitude to the Russian social network VKontakte in 2018

Following the official ban on access to a number of popular Russian websites and social networks, the patterns of use of the social network "VKontakte" changed significantly: one third of internet users have stopped using this social network, and more than 10% of Ukrainians have begun visiting this social network less often than before the introduction of the ban. The VPN app has become a popular tool for bypassing the VKontakte block, despite limited access to vk.com in Ukraine.



The Use of VKontakte



Questions: 1.







TRUST IN MEDIA





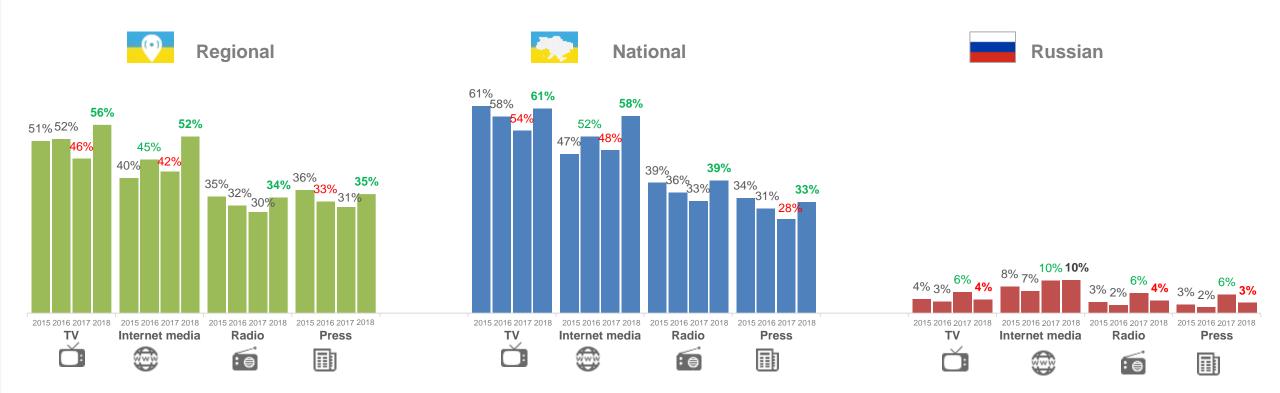
Level of trust in news presented in the media

Most respondents demonstrated trust only in Ukrainian media.

There has been an increase in the level of trust in both regional and national media.

Meanwhile, the level of trust in Russian TV, radio and print media has decreased, compared to the previous year's findings.

Trust in media, 2015-2018







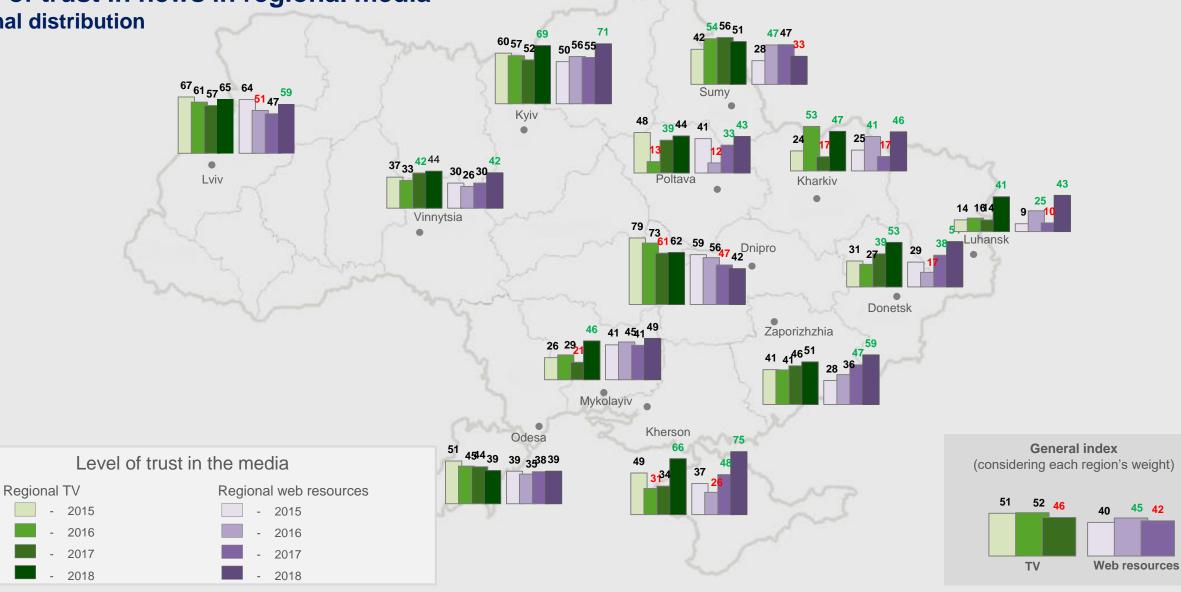
Key reasons why Ukrainians do not trust the media The key reasons for not trusting the media include unreliability of the information provided and presentation by an author of only one point of view on a topic or issue.

Regional	Trust	DO NOT trust		Reasons for n	ot trusting the	media		
тү 📺	56%	20%	N= 323	37%	18%	15%	16%	5%2%5%
Digital media 💮	52%	11%	N= 180	40%	19%	15%	8%	<mark>5%1</mark> % 10%
Radio 📻	34%	9%	N= 149	41%	15%	17%	7%	11% 4% 5%
Print media	35%	10%	N= 170	39%	18%	15%	11%	6% 2% 7%
National								
тү 📺	61%	24%	N= 401	42%	23%	12%	, o	<mark>13% 3%</mark> 2%4%
Digital media	58%	12%	N= 193	42%	23%	12%	9%	<mark>6 3%</mark> 2% 9%
Radio 🗐	39%	9%	N= 155	40%	17%	16%	7%	10% 3% 6%
Print media	33%	11%	N= 184	42%	21%	12%	119	<mark>% 6% 2%</mark> 5%
Russian								
тү 📺	4%	40%	N= 653	37%	30%	109	% 7%	7% 3% 5%
Digital media	10%	31%	N= 514	36%	30%	12%	5 <mark>%</mark>	8% 2% 7%
Radio 🗐	4%	27%	N= 438	37%	27%	14%	6% <mark>6</mark> %	<mark>5 7% 3%</mark> 6%
Print media	3%	28%	N= 465	40% tion provided seems unreliable	25%	14%		
			I he lack of t	tion provided seems unreliable facts erested in the topics covered	I do	on't like the forma	t of informa	view on the issue ation presentation tlet and I don't trust this
	you trust as a news sourc ust this news source?	e?			mple, N~1640/wave ents who do not trust this	media type		ificantly more / less at 95% o the previous wave



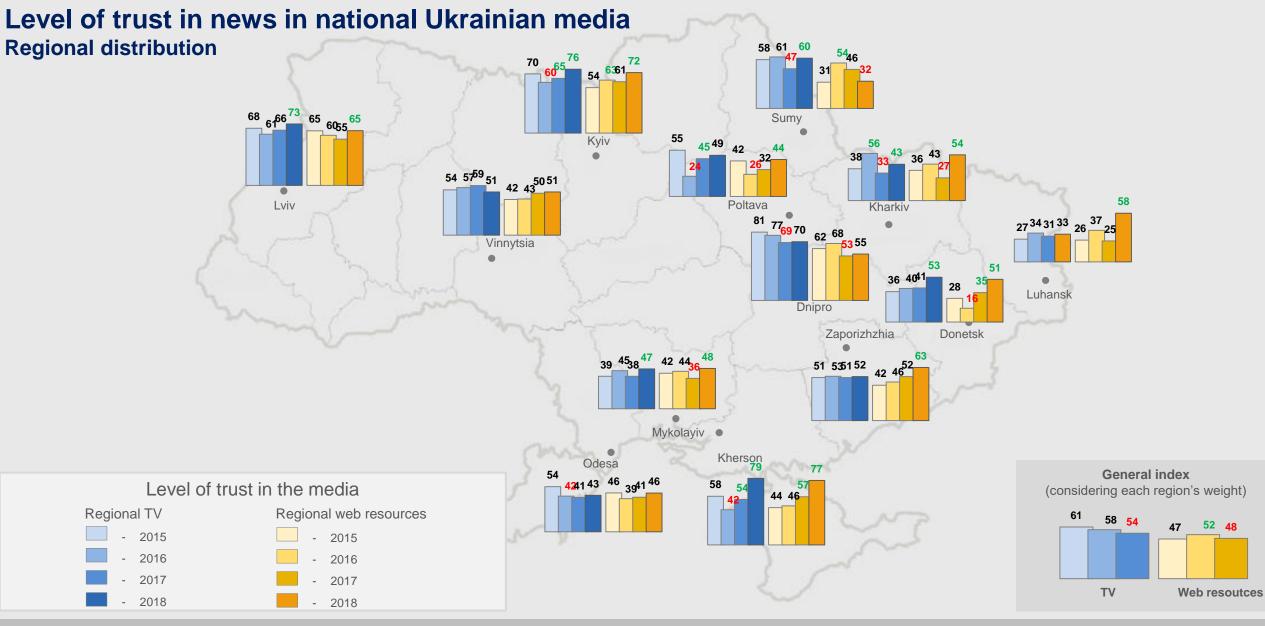


Level of trust in news in regional media Regional distribution





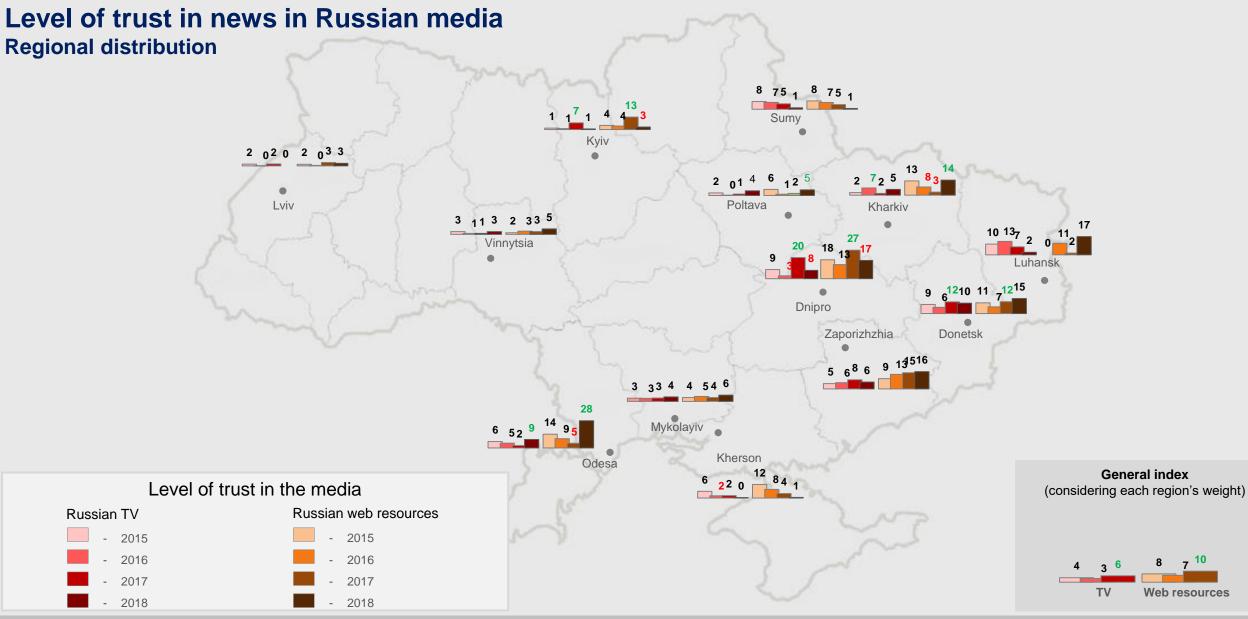




x / x – Significantly more / less at 95% compared to the previous wave

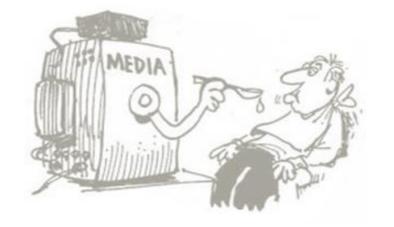












MEDIA COMPETENCE





Demands in news

People's main requirements from the news have remained unchanged since the first study (i.e. during the period of three years) – accuracy and credibility. Compared to last year, more respondents underlined timeliness as one of the key news values.

Main demand to news

	2010	2010				
	2015	2016	2017	2018	3	
Credibility / reliability	46%	43%	43%			44%
Objectivity	20%	22%	24%		19%	
Timeliness	10%	12%	10%	15	i%	
Completeness of coverage	8%	8%	9%	10%		
Accuracy	8%	10%	8%	8%		
Separation of facts and comments	6%	6%	5%	5%		

2015 - 2018



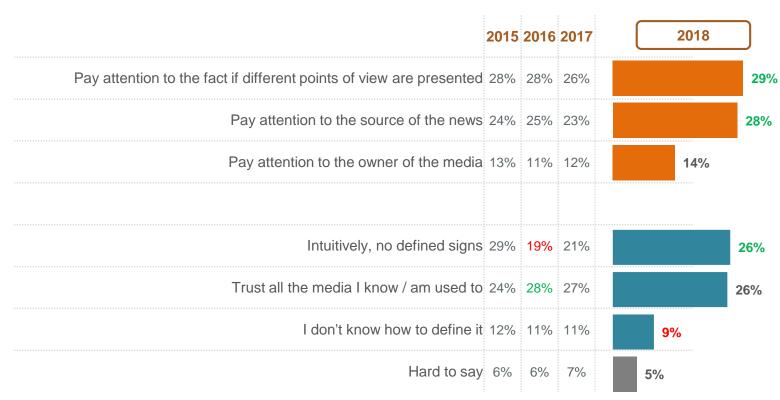


Signs of reliable information

The share of people who critically evaluate the reliability of information (i.e. by analyzing the presentation of different points of view and checking the news source) has increased since last year.

However, there has also been an increase in the number of respondents who evaluated the credibility of media information strictly by their gut instinct.

What features do you look for to determine if the media information you see should be trusted?



2015-2018

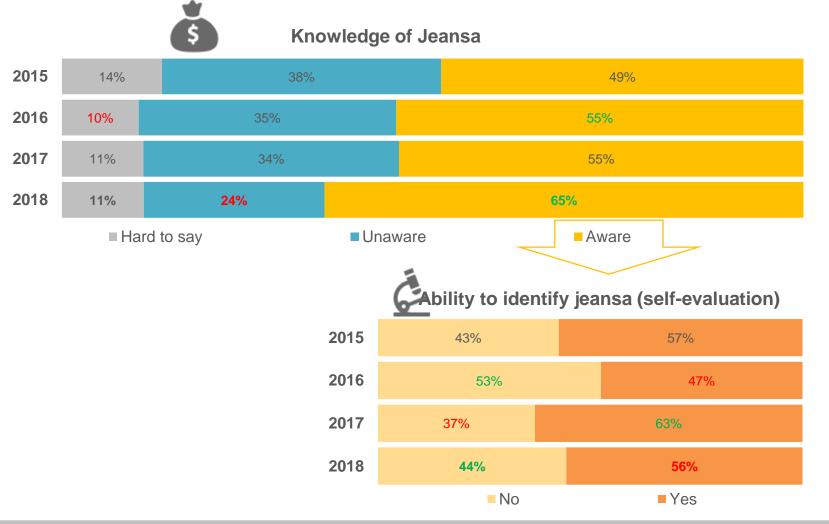
Base:





Jeansa: awareness, ability to distinguish

People became more aware of sponsored materials in the media, but fewer respondents indicated that they could distinguish real news from sponsored content.



Question: 1. Do you know that in the media sometimes there are paid / custom materials, hidden advertising under the guise of ordinary materials? 2. In your opinion, are you able to distinguish such materials from ordinary ones? Base: Total, N~1640/wave Those who are aware N~802 / 900 / 900 / 1061

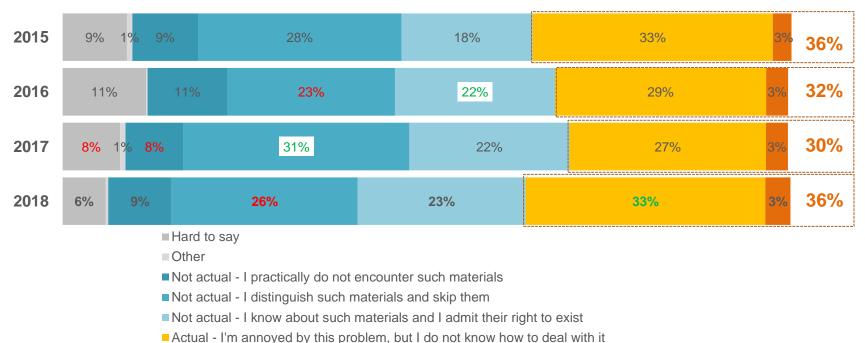
x / x – Significantly more / less at 95% compared to the previous wave





Jeansa: how to fight it.

Compared to the previous year's findings, more respondents agreed that sponsored content had become an important problem. At the same time, many of those who acknowledged the importance of this problem did not have any ideas on how to address it.



Combating the jeansa problem

2015-2018

Actual - I'm annoved by this problem, and I'm actively combating it





Jeansa. Estimation of the frequency of placement

Survey findings consistently show that television is perceived as the main source of sponsored content, if compared to other media types. However, the number of respondents who noticed paid journalism and infomercials in the regional press and Russian media outlets has decreased since last year.

Estimation of the jeansa frequency, 2015-2018												
	•••	Regional				National				R	ussian	
					*			\bigcirc		_		\bigcirc
TV	2015 27%	5 <mark>%</mark> 5% 12% 18% 17%	<u>9%</u> 7% 15%	2015 13%2 <mark>%</mark>	% 15% <mark>2</mark>	6% 18%	12% 8%	20%	2015	51%	6 <mark>%2</mark> 3%/29% 7% 8% 14%	22%
\checkmark	2016 19% <mark>6%</mark> 6	5% 11% 21% 17%	10% 9% 20%	2016 10%2%3%	5 13% 24%	25%	11% 9%	20%	2016	54%	<mark>5%2%%5%10%</mark> 18%	29%
	2017 26%	<mark>7%</mark> 6% 14% <mark>16%</mark> 14%		2017 14% 3%	<mark>۵%</mark> 12% <mark>22</mark> %	<mark>6 19% 1</mark> 2	2% 12%	24%	2017	62%	<mark>8%22%3%5%4%</mark> 14%	18%
	2018 24% 7	% 10% 17% <mark>17%</mark> 11 [%]	% <mark>5%</mark> 10% 15%	2018 12%3 <mark>%</mark>	10% 19%	20% 15%	<mark>7%</mark> 14%	20%	2018	72%	8%228%3%7%	10%
Internet media	a 2015 40%	6% <mark>6%</mark> 8% 16% 1	4% 5% 10%	2015 28%	5 <mark>5%</mark> 8% 119	% 20% 14%	% <mark>8%</mark> 6%	14%	2015	53%	<mark>622</mark> 38 <mark>40%</mark> 8% 6% 13%	19%
	2016 39%	6% <mark>5%</mark> 11% 20%	9% <mark>5%5% 11%</mark>	2016 29%	6 <mark>5%</mark> 7% 119	% 18% 17%	6% <mark>7%</mark> 6%	13%	2016	56%	<mark>5%%%7%6%7%</mark> 14%	21%
	2017 37%	7% 9% 12% 13% 1	1% <mark>6%</mark> 7% 12%	2017 27%	<mark>6%</mark> 9% 14	4% <mark>18%</mark> 13 ⁴	% <mark>6%</mark> 8%	14%	2017	60%	<mark>7%2</mark> %% <mark>6%</mark> 7% <mark>5%</mark> 9%	14%
	2018 33%	7% 16% 9% <mark>13%</mark> 1	0% <mark>4%8% 12%</mark>	2018 25%	<mark>6%</mark> 15% ´	11% <mark>17%</mark> 119	% <mark>5%</mark> 10%	15%	2018	65%	<mark>7%</mark> 38 <mark>5%4%</mark> 10%	14%
Press	2015 44%	7% <mark>5%10% 12% 1</mark>	0% <mark>5%</mark> 6% 12%	2015	46% 6	% <mark>5%9% 12% 1</mark>	2% <mark>5%</mark> 7%	11%	2015	61%	<mark>7%</mark> %%%%%%%%%%%%%%%%%%%%%%%%%%%%%%%%%%%	17%
Eb	2016 45%	5 <mark>%4%7% 15%</mark> 1;		2016	48%	4 <mark>%%% 12%</mark> 1	5% <mark>6%4</mark> %	11%	2016	70%	<mark>5%2%5%</mark> %9%	12%
	2017 46%	5 8% <mark>7%</mark> 8% <mark>11%</mark> 8	^{8%6%} 7% 12%	2017	49%	8%5%7% <mark>11%</mark>	7% <mark>7%</mark> 6%	13%	2017	70%	<mark>8%2<mark>28</mark>44%3%8%</mark>	11%
	2018 50	6% 8% <mark>4%7%</mark> 99	<mark>% 7%<mark>%%%</mark> 8%</mark>	2018	56%	<mark>8%4%7%</mark> 8%	<mark>6%4%8%</mark>	11%	2018	78%	9% <mark>02788</mark> 5%	8%
Radio	2015 53	% <mark>8%3</mark> %9% 139	<mark>% 7%4%% 7%</mark>	2015	48%	9%4%8% 14%	11%3 <mark>%%</mark>	6%	2015	63%	7%	11%
	2016 55	5% 7% <mark>3%5% 13%</mark>	1/0	2016	52%	<mark>7%</mark> 3%7% 12%	11% <mark>5%</mark> %	8%	2016	71%	<mark>572758%4%4%</mark> 8%	12%
: 🖨	2017 519	% 10% <mark>6%</mark> 10% 10		2017	49%	9% 7% 10% 11	<mark>% 6%4%</mark> %	8%	2017	70%	<mark>9%2%%%%%%%%%%%%%%%%%%%%%%%%%%%%%%%%%%%</mark>	11%
	2018 55	5% 10% 7% 7% <mark>8</mark>		2018	50%	10% 9% 7% <mark>9</mark>	<mark>% 622%6%</mark>	9%	2018	77%	10%/ <mark>3</mark> 2285%	7%
								\bigcup				\bigcup
		■ Hard to say	Never	2 3	4	5	6	Very	often	op2box		
Question <i>How</i> :	often do you encounter	custom / paid materials in	? Scores from 1 (never) to	o 7 (very often)	Base:	Those disting N~460 / 427 /	uishing paid ma ′ 565 / 590	iterials			 Significantly more / less a bared to the previous wave 	





Jeansa: regional differences.

Residents of the northern and central regions of Ukraine were more aware of sponsored content. The majority of residents in the western and central regions reported being not able to distinguish real news from paid journalism.

	National index	West	North	Center	South	East
Awareness of jeansa Aware Unaware Hard to say	65%	69%	73%	73%	49%	62%
Ability to distinguish (self evaluation)						
Yes	56%	48%	59%	45%	58%	61%
No	44%	52%	41%	55%	42%	39%
How serious is the of jeansa problem?						
Not serious - I do not encounter such materials	9%	11%	6%	9%	8%	10%
Not serious – I distinguish such materials and skip them	26%	20%	33%	23%	24%	23%
Not serious – I know about such materials and I admit their right to exist	23%	18%	23%	28%	21%	26%
Serious - I'm annoyed by this problem, but I do not know how to deal with it	33%	44%	32%	31%	31%	29%
Serious - I'm annoyed by this problem, and I'm actively combat it	3%	2%	2%	5%	10%	2%
Other	0%	0%	0%	0%	0%	1%
Hard to say	6%	5%	4%	4%	6%	9%

Do you know that in the media sometimes there are paid / custom materials, hidden advertising under the guise of ordinary materials? In your opinion, are you able to distinguish such materials from ordinary ones?

2.

3. How actual is the problem of paid/jeansa materials in media for you?

Significantly higher/lower in comparison to Total (CI 95%)

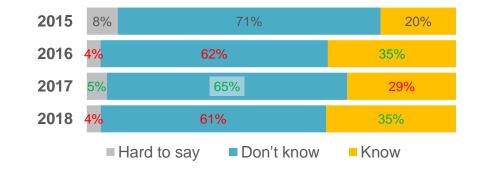
Total, N=1643



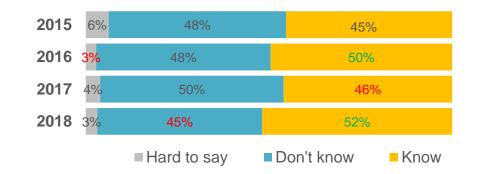


Attitude towards media owners

The survey reveals an increase in the number of respondents who are aware of the owners and those controlling the regional and national media. As before, about a third of respondents believe this information is important.

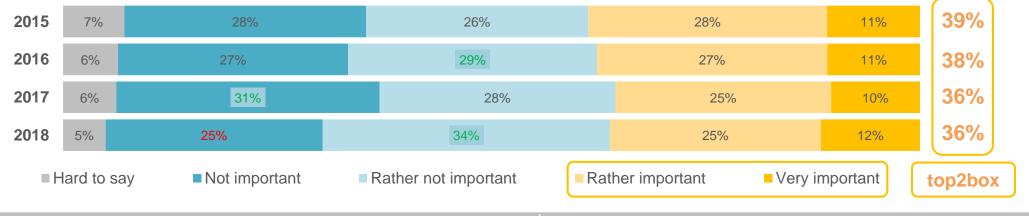


Awareness of owners of local media



Awareness of owners of national TV channels

Importance of knowing the media owner



uestion: How important is it for you to know who owns the media?

Do you know who is the owner of the regional media that you regularly read / watch / listen to? Do you know who owns national TV channels?

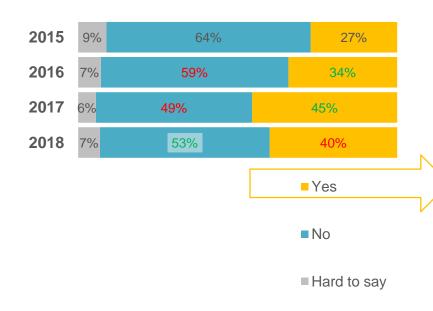




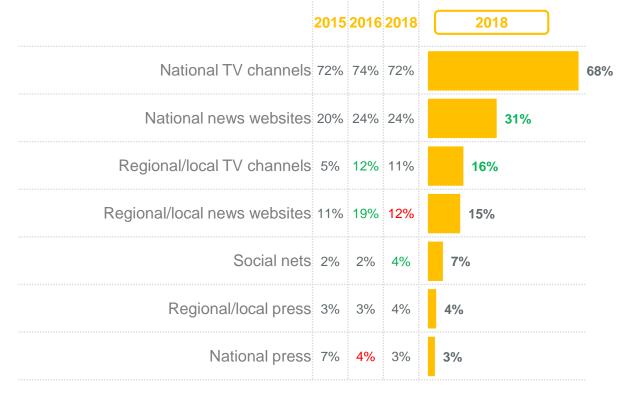
Awareness of investigative journalism

The level of general awareness of investigative journalism, in particular of stories about the income and asset declarations of public officials, decreased slightly this year. Among all respondents who were aware of this type of reporting, they watched investigative journalism programs on TV or read online stories (published on both national and regional news sites).

Did you see journalism investigations of the declarations of the officials during the last month



Where did you see them?



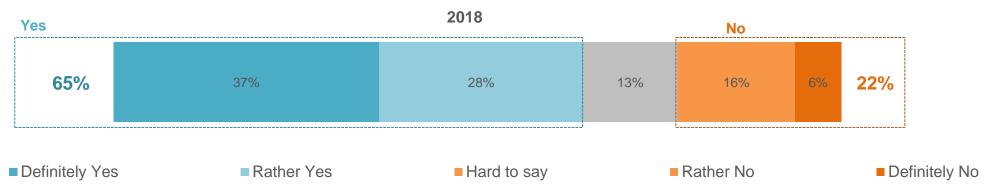




Overall attitude towards political advertising in 2018

The vast majority of respondents would approve of a political advertising ban on television.

Should political advertising be banned from TV?



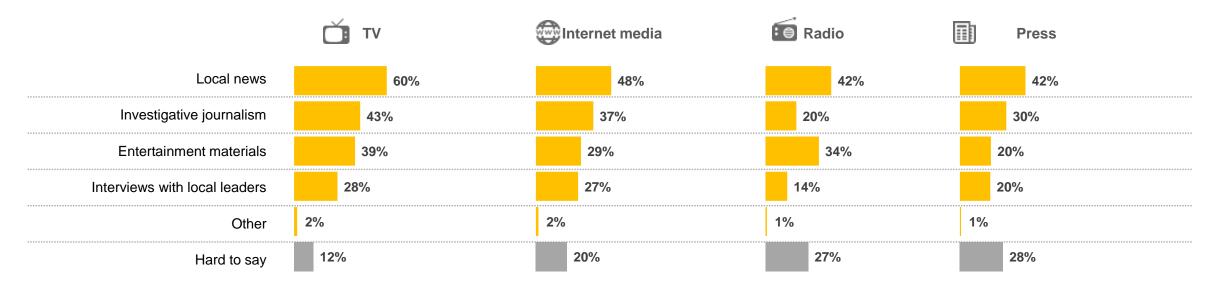




Regional Media Content in 2018

The majority of respondents would like to see more local news in the regional media. Entertainment programs were rated as the most popular type of the regional radio content.

Which type of content would you like to see in the regional media?







REFORMS





Awareness of Reforms

The levels of awareness of decentralization, energy and healthcare reforms have increased since last year. Meanwhile, the level of awareness of land reform has decreased.

	- Me	Decentralization		Health-care Reform		Energy Sector Reform		and Reform	Retirement Reform	
	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018
Have you seen/heard/read any materials covering this reform in the last 30 days?	40%	47%	49%	71%	28%	31%	43%	37%	61%	61%
Where exactly did you find information about the reforms?		Yes, I have No, I haven't		······						4
National TV channels	74%	72%	75%	69%	73%	68%	75%	67%	75%	73%
National news sites	25%	30%	24%	30%	24%	29%	22%	30%	23%	30%
Regional / local TV channels	18%	21%	17%	21%	13%	14%	12%	17%	16%	22%
Regional news sites	10%	16%	10%	17%	9%	15%	8%	12%	9%	16%
Social networks	3%	6%	3%	6%	3%	6%	2%	6%	3%	5%
Regional / local print media	8%	6%	7%	5%	5%	6%	6%	6%	7%	7%
National print media	4%	5%	5%	5%	4%	5%	5%	4%	5%	7%
Is the media coverage of reforms sufficient?		<u>.</u>			1	-L				1
Insufficient	41%	35%	54%	44%	50%	45%	54%	50%	52%	44%
Sufficient	46%	55%	36%	45%	35%	44%	32%	40%	36%	43%
Too much	5%	4%	2%	5%	5%	3%	4%	2%	4%	5%
Hard to tell	8%	6%	7%	5%	10%	8%	9%	7%	7%	7%
Questions 1. Have you seen/heard/read any print or video materia 2. Where exactly did you find printed press / TV materia			>			B acc.	l∼1640 / wa	ve ave seen/heard/read the pa	articular refor	m media coverade

3. In your opinion, is the media coverage of the content of the... reform and the course of its implementation sufficient?

Respondents who have seen/heard/read the particular reform media coverage, 2017, N = 661 / 815 / 457 / 714 / 1009; 2018, N = 771, 1169, 516, 604, 999





Demographic profile of those asked about their awareness of reforms 2018

Young Ukrainians are barely aware of the progress in the implementation of key reforms.

		*	Decentralization	\odot	Health-care Reform	No E	nergy Sector Reform	1555	Land Reform	🔥 Re	tirement Reform
Have heard about reform	Total		47%		71%		31%		37%		61%
	N=1643	N=771		N=1169		N=515		N=604		N=999	
Gender Male	46%		49%		44%		49%		48%		46%
Female	54%		51%		56%		51%		52%		54%
Age 18-25	13%	8%		10%		8%		9%		8%	
26-35	27%	269	%	25	%	24	%	2	4%	22	%
36-45	23%	23%	6	24	%	22	%	21	%	23	%
46-54	18%	22%	0	20%	%	22	%	23	3%	229	%
55-65	19%	21%)	219	%	23	%	23	3%	25	5%
Education Incomplete secondary	1%	1%		0%		0%		1%		1%	
Secondary	13%	12%		13%		13%		13%	, D	14%	
Secondary special	41%		40%		42%		37%		38%		41%
Incomplete higher	7%	5%		6%		5%		5%		5%	
Higher	38%		42%		39%		44%		44%		40%

Significantly higher/ lower in comparison to Total (CI 95%)

Questions 1. Have you seen/heard/read any print or video materials covering these reforms in the last 30 days?

Base: Respondents who have seen/heard/read the particular reform media coverage, N=771, 1169, 516, 604, 999





Decentralization: regional differences 2018

Residents of western and southern regions were more aware of reforms, while the study recorded a lower level of public awareness in the northern region. People in the western region of Ukraine received more information on decentralization reform, mainly from the national and local TV channels.

	National index	West	North	Center	South	East		
Have you seen/heard/read any materials covering this reform in the last 30 days? Yes, I have No, I haven't	47%	57%	40%	53%	39%	50%		
Where exactly did you find information about the reform?								
National TV channels	72%	83%	67%	66%	71%	71%		
National news sites	30%	25%	30%	35%	40%	28%		
Regional / local TV channels	21%	33%	19%	10%	20%	20%		
Regional news sites	16%	9%	16%	18%	19%	18%		
Social networks	6%	5%	6%	2%	4%	10%		
Regional / local print media	6%	3%	9%	2%	7%	6%		
National print media	5%	2%	6%	4%	5%	8%		
Is media coverage of the reform sufficient?								
Insufficient	35%	26%	41%	42%	34%	33%		
Sufficient	55%	58%	50%	52%	58%	57%		
Too much	4%	2%	3%	2%	3%	6%		
Hard to tell	6%	13%	5%	4%	4%	3%		
				Significantly higher /	lower in comparison to Nationa	al index (CI:95%)		
Questions 1. Have you seen/heard/read any print or v 2. Where exactly did you find printed press 3. In your opinion, is the media coverage of	/ TV materials about this reform?			Base: Total, N=1643 Respondents wh				





Health Care Reform: regional differences 2018

TV channels (both national and regional) constitute the main source of information on this reform for residents of the western region. In the North, more people learned about this reform from local digital media outlets. The majority of respondents from the western oblasts confirmed having a sufficient amount of information on healthcare reform. By contrast, most residents in the northern region complained about a lack of information on this reform.

most residents in the northern region of	National index	West	North	Center	South	East
Have you seen/heard/read any coverage of this reform in the last 30 days? Yes, I have No, I haven't	71%	75%	72%	74%	70%	68%
Where exactly did you find information about this reform?						
National TV channels	69%	79%	61%	63%	72%	71%
National news sites	30%	28%	32%	34%	38%	24%
Regional / local TV channels	21%	30%	23%	7%	21%	19%
Regional news sites	17%	8%	25%	17%	17%	15%
Social networks	6%	4%	8%	5%	2%	9%
Regional / local print media	5%	7%	6%	2%	5%	4%
National print media	5%	2%	6%	1%	5%	6%
Is media coverage of this reform sufficient?						
Insufficient	44%	32%	53%	41%	46%	43%
Sufficient	45%	53%	38%	47%	43%	47%
Too much	5%	4%	4%	6%	5%	6%
Hard to tell	5%	12%	5%	3%	5%	2%
				Significantly higher / lo	ower in comparison to National	index (CI:95%)
Questions 1. Have you seen/heard/read any print or video materials covering these reforms in the last 30 days? Base: Total, N=1643 2. Where exactly did you find printed press / TV materials about this reform? Respondents who have seen/heard/read the particular reform media coverage of the content of the reform and the course of its implementation sufficient?						





Energy Sector Reform: regional differences 2018

Residents of the eastern region displayed the highest level of awareness of this reform among all regions of Ukraine. The majority of respondents from the southern region reported a lack of information on energy reform.

, , , ,	C .	- America		. Track	. SmcB	. march	
	National index	West	North	Center	South	East	
Have you seen/heard/read any coverage of this reform in the last 30 days? Yes, I have No, I haven't	31%	34%	28%	31%	26%	36%	
Where exactly did you find information about this reform?							
National TV channels	68%	78%	64%	51%	66%	70%	
National news sites	29%	14%	36%	43%	40%	24%	
Regional news sites	15%	4%	24%	14%	16%	16%	
Regional / local TV channels	14%	16%	17%	7%	19%	10%	
Social networks	6%	3%	9%	4%	0%	8%	
Regional / local print media	6%	10%	9%	2%	2%	3%	
National print media	5%	2%	10%	4%	4%	2%	
Is media coverage of this reform sufficient?							
Insufficient	45%	39%	47%	50%	61%	38%	
Sufficient	44%	40%	45%	38%	32%	52%	
Too much	3%	2%	2%	3%	4%	2%	
Hard to tell	8%	18%	5%	8%	4%	7%	
			_	Significantly higher	/ lower in comparison to Nation	al index (CI:95%)	
Questions 1. Have you seen/heard/read any print or video materials covering these reforms in the last 30 days? Significantly higher / lower in comparison to National index (CI:95%) Respondents who have seen/heard/read the particular reform media In your opinion, is the media coverage of the content of the reform and the course of its implementation sufficient? Base: Total, N=1643 Respondents who have seen/heard/read the particular reform media							





Land Reform: regional differences 2018

The population of the central region demonstrated the highest level of awareness of land reform.

	National index	West	North	Center	South	East	
Have you seen/heard/read any coverage of this reform in the last 30 days? Yes, I have No, I haven't	37%	40%	33%	45%	33%	38%	
Where exactly did you find information about this reform?							
National TV channels	67%	79%	63%	55%	68%	66%	
National news sites	30%	18%	32%	48%	36%	24%	
Regional / local TV channels	17%	23%	19%	8%	19%	14%	
Regional news sites	12%	5%	14%	9%	15%	15%	
Social networks	6%	4%	7%	2%	3%	10%	
Regional / local print media	6%	6%	9%	3%	4%	5%	
National print media	4%	1%	9%	1%	5%	2%	
Is media coverage of this reform sufficient?							
Insufficient	50%	45%	52%	56%	65%	41%	
Sufficient	40%	34%	41%	35%	30%	50%	
Too much	2%	1%	2%	3%	3%	2%	
Hard to tell	7%	19%	3%	5%	3%	5%	
				Significantly higher	lower in comparison to Nationa	al index (CI:95%)	
Questions1. 2.Have you seen/heard/read any print or vi Where exactly did you find printed press In your opinion, is the media coverage of	/ TV materials about this reform?			Base: Total, N=1643 Respondents w	no have seen/heard/read the partico 4, 110, 139, 73, 100, 182		

50





Retirement Reform: regional differences 2018

As with other reforms, national digital media is the main source of information about this reform for residents of the central region, while respondents from the western region rarely mentioned this media type as a source of news about the reform.

	National index	West	North	Center	South	East
Have you seen/heard/read any coverage of this reform in the last 30 days? Yes, I have No, I haven't	61%	61%	62%	65%	63%	57%
Where exactly did you find information about this reform?						
National TV channels	73%	79%	72%	60%	73%	78%
National news sites	30%	26%	31%	44%	37%	21%
Regional / local TV channels	22%	28%	22%	9%	26%	21%
Regional news sites	16%	8%	20%	19%	18%	15%
National print media	7%	6%	10%	1%	6%	7%
Regional / local print media	7%	10%	7%	3%	6%	6%
Social networks	5%	6%	6%	2%	2%	6%
Is media coverage of this reform sufficient?						
Insufficient	44%	31%	50%	44%	39%	50%
Sufficient	43%	47%	38%	46%	46%	42%
Too much	5%	5%	4%	6%	9%	3%
Hard to tell	7%	16%	6%	2%	6%	4%
				Significantly higher	lower in comparison to Nation	al index (CI:95%)
Questions 1. Have you seen/heard/read any print or v. 2. Where exactly did you find printed press 3. In your opinion, is the media coverage of	/ TV materials about this reform?			Base: Total, N=1643 Respondents w	ho have seen/heard/read the partic 9, 168, 266, 106, 187, 272	





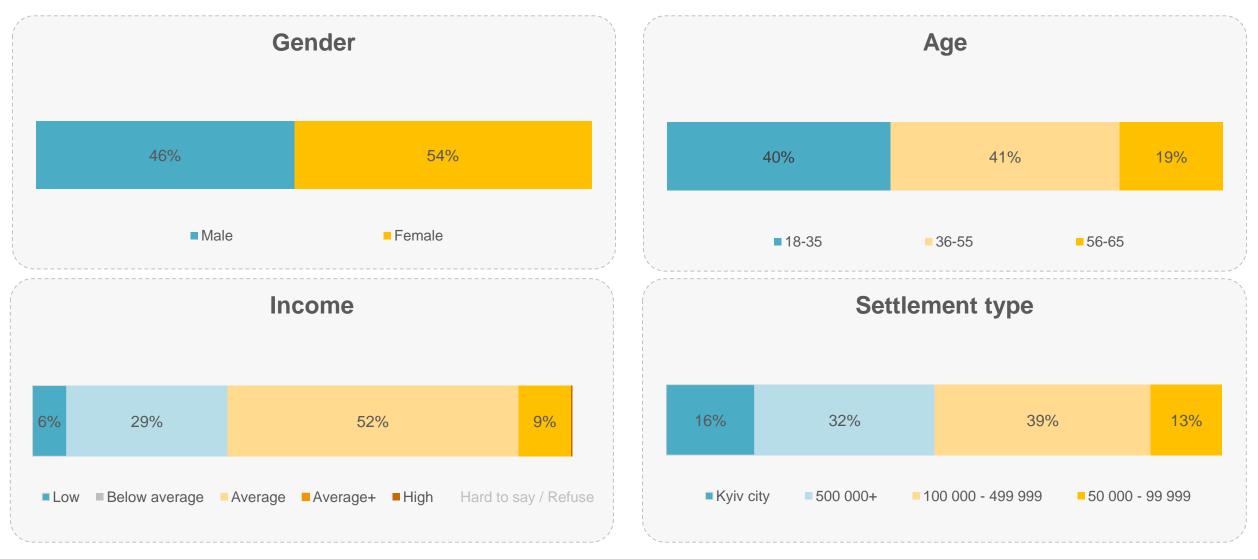


SOCIAL-DEMOGRAPHIC PROFILE





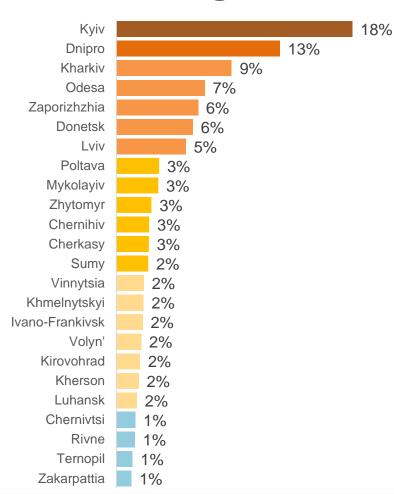
Social-demographic profile. 2018







Social-demographic profile. 2018

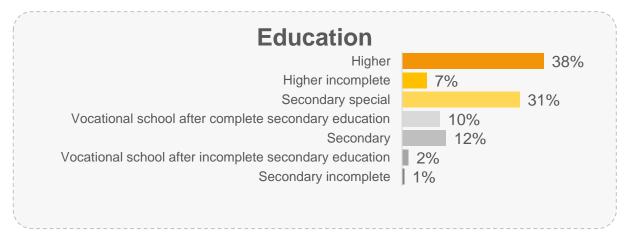


Region





Social-demographic profile. 2018



Job

