



# UKRAINE: MEDIA CONSUMPTION AND PERCEPTIONS RESEARCH



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# EXECUTIVE SUMMARY

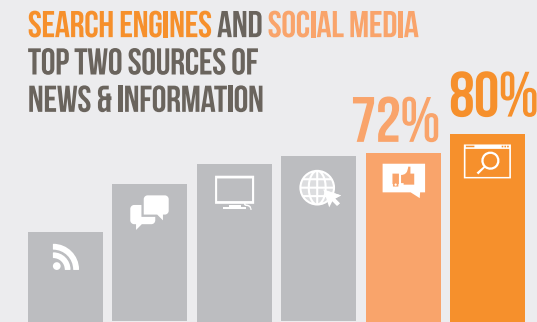
Search engines and social media are the two most popular sources of news and information in Ukraine. On a weekly basis, 80% of the sample of adults we surveyed use search engines, while 72% turn to social media. Although two in three adults (67%) use TV at least weekly, demonstrating the importance of digital platforms in Ukraine.

Few people have complete trust in the media – just 11% trust news most of the time. This is not unique to Ukraine and some degree of scepticism is to be expected, and is welcome. At the same time, there is a general consensus that there are a lot of fake stories and propaganda in all types of news, with 82% of our survey respondents believing this to be the case.

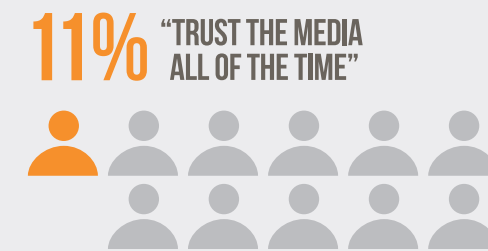
The challenges for independent media in Ukraine are mainly around public suspicion that such outlets are not genuinely independent or, where they are, are too niche or of poor quality. Three in five adults (59%) do not think there are independent media in Ukraine – partly because they feel that many outlets are controlled and funded by the state, foreign powers or oligarchs, and that journalists have to follow their funder’s interests.

A significant proportion of our respondents (17%) think that Covid-19 is a hoax. Public criticism of the way in which the media has reported the pandemic is likely to have damaged trust in journalism even more.

There is public demand for good journalism that is impartial, objective and professional. A majority (65%) believe they already access this type of journalism, even where they are critical of the media in general. Independent journalism therefore needs to distinguish itself from other forms of media, and supply news and information in a way that is appealing to potential audiences and on subjects in which they are interested.



*“Journalists who do not want to sell themselves or do as they are told... they are independent, they are happy to be that way, but they are not well-off financially (30 year-old woman, small towns, South Ukraine)”*



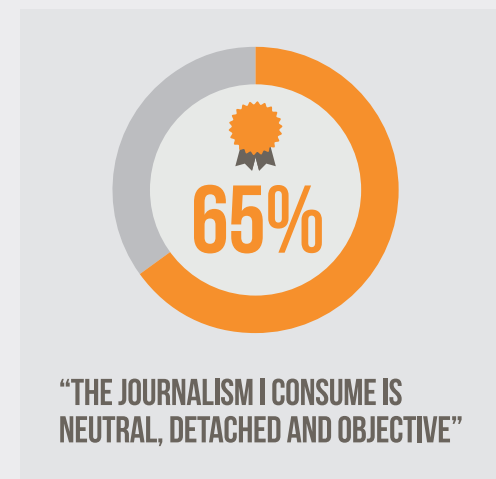
**“CAN TRUST INFORMATION  
PROVIDED BY INDEPENDENT MEDIA”**



**“DO NOT THINK THERE IS  
INDEPENDENT MEDIA IN UKRAINE”**



**“INDEPENDENT MEDIA CONSISTENTLY  
FINDS NEWS STORIES WHICH I CANNOT  
FIND ON OTHER PLATFORMS”**



**17% “COVID IS A HOAX”**

*“The key reason why I consider information to be true is the source from which I get it. If I have chosen a source... I will partly believe this information due to that (53 year-old, woman, regional capitals, South Ukraine)”*



## METHODOLOGY

This report is based on quantitative and qualitative research with the Ukrainian population. The quantitative research used a random sampling approach to obtain a representative sample of adults aged between 18 and 65 years living in Ukraine. All respondents were interviewed by telephone and a total of 515 successful interviews were completed between 1 and 11 December 2020. Where the report refers to “people” or “adults” it means those surveyed in the research.

Interviews were conducted by InMind, a professional social and market research agency based in Ukraine.

Overall, 47% of respondents were male and 53% female. The age distribution is split as follows: 34% aged 18-34 years, 35% aged 35-49 years and 31% aged 50-65 years. Respondents were selected from across Ukraine, broken down as: 28% west, 34% centre, 20% east, 12% south and 7% Donbass. 16% of those interviewed were educated to secondary level, a further 39% had achieved vocational level, 42% higher level and 1% a post-graduate degree. Just over half (52%) were salaried workers at the time of the interview.

The quantitative research was designed to provide statistically reliable data on the

media consumption behaviour of Ukrainian adults and to measure their attitudes to the media landscape in their country.

In addition, to provide a more granular understanding of why people hold particular views, seven focus groups were conducted in February 2021. These focus groups were recruited and moderated by researchers from InMind and held virtually. In total, 42 participants from a broad cross-section of adults across Ukraine took part in the focus groups. The participants were men and women aged between 18 and 60 years, of various occupations and with various political preferences, who were active consumers of news/information.

To supplement the quantitative and qualitative research with audiences in Ukraine, a social media listening study was also conducted. This research examined 188 information outlets across websites, Facebook, YouTube and Telegram channels. The Buzzsumo social listening and trend-analysis tool was used to monitor trending topics in Ukraine over the period of the month of February 2021. This allowed the research team to identify the accounts that gained the most audience attention and monitor how audiences interacted with them.







REUTERS/Yannis Behrakis

## BACKGROUND

This research is funded by the UK's Foreign, Commonwealth and Development Office's Independent Media in the Eastern Partnership States. The Thomson Reuters Foundation, in partnership with BBC Media Action, is delivering assistance to independent media across Ukraine, focusing on media partners operating at national and oblast level. The purpose of this research is threefold: 1) to contribute to the baseline for future programming; 2) to support identification of additional activities to assist media to build trust with their core audiences; and 3) to provide independent media with audience insights which they might not otherwise be able to access. These include key issues such as audience understanding of good journalism, audience interpretation of independent media, and how people access new information on social media and other platforms.

The Ukraine media landscape has seen gradual and steady improvements in press freedom since 2013, with the country achieving its highest ever ranking (96) in the 2020 World Press Freedom Index by Reporters Without Borders.<sup>1</sup> However, there are still critical blocks to improving access to information, such as news manipulation, violations of confidentiality of sources, cyber-attacks, aggressive legislation blocking press freedom, and attacks

against journalists (physical and online). The Institute of Mass Information, a media NGO, recorded 229 violations of freedom of speech, including 171 cases of physical aggression against journalists.<sup>2</sup> The US-based NGO Freedom House reports that Ukraine still needs to take important steps to protect free and independent media. It highlights the Constitutional guarantees of freedom of speech and expression and the considerable pluralism in the media landscape, with open criticism and investigation of the government of the day; however, business magnates and oligarchs own and influence many outlets, using them as political tools to advance their agenda.<sup>3</sup> The Government's decision to revoke the licences of three pro-Russian media outlets – ZIK, 112 Ukraine and NewsOne – is yet to be reflected in audience consumption habits, trust in the media and government. It is not clear if this move was a one-off or the start of a new trend of government intervention.

Against this backdrop it is important to bolster independent media that can be trusted as part of creating more free, fair, and informed societies. The need for trusted information sources has been even more urgent during the COVID-19 pandemic and 'infodemic', where audiences require objective, clear and concise reporting to make, in some instances,



life-saving decisions. As the Reuters Institute for the Study of Journalism highlights in its The Trust in News Project, trust is one of the most important commodities for media and constitutes “the new currency for success”. The Institute argues that it is not just a founding principle for journalism but also important to media business models that are increasingly reliant on direct revenue from subscribers and supporters.<sup>4</sup>

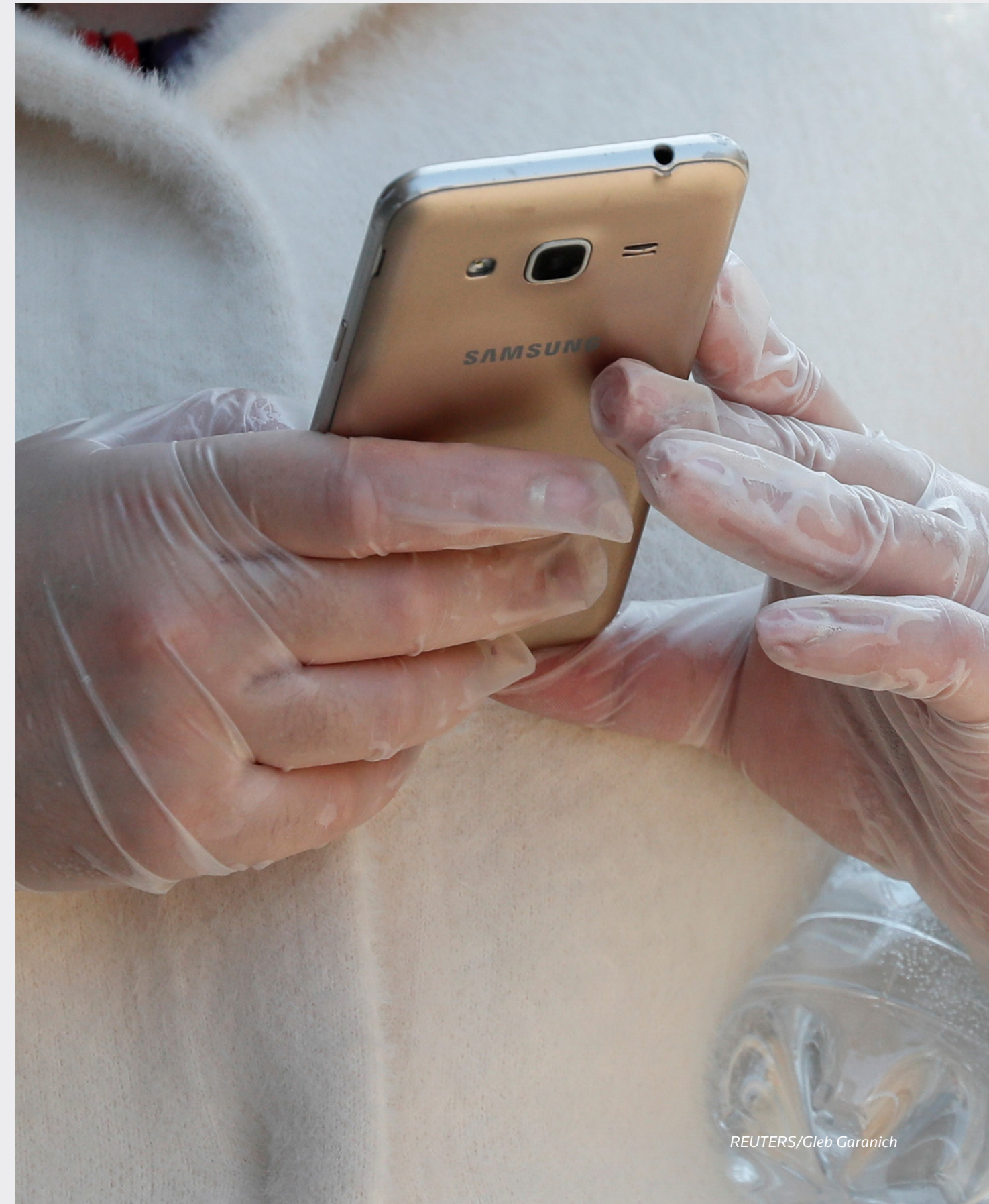
The findings of this research will be used to help the donor community, practitioners and independent media in Ukraine to better understand their audience’s perceptions of independent media and good journalism, and to make recommendations of how to enhance the ability of independent media to reach and retain their audience and to raise awareness within Ukraine of the presence and importance of independent media.

<sup>1</sup> <https://rsf.org/en/ukraine>

<sup>2</sup> <https://imi.org.ua/en/monitorings/in-2020-imi-recorded-229-cases-of-violations-of-freedom-of-speech-in-ukraine-136909>

<sup>3</sup> <https://freedomhouse.org/country/ukraine/freedom-world/2020>

<sup>4</sup> <https://reutersinstitute.politics.ox.ac.uk/what-we-think-we-know-and-what-we-want-know-perspectives-trust-news-changing-world>







REUTERS/Gleb Garanich

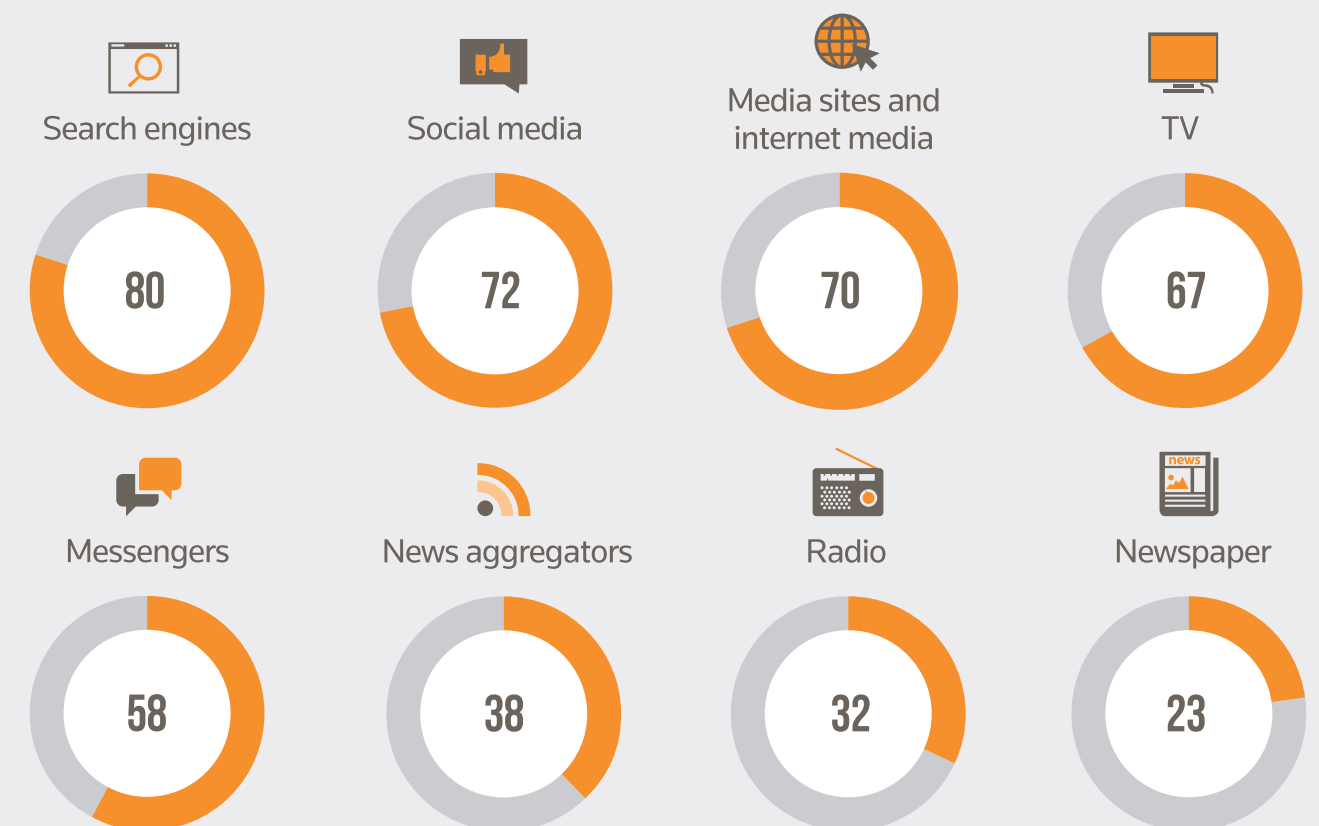
## MEDIA CONSUMPTION

The survey respondents were asked where they liked to get their news from and which sources they used most frequently. The most frequently used sources of information for news were search engines (64% use daily) and social media (54%). Fewer than half the public rely daily on media sites/internet media (45%), TV (43%) or messengers (39%).

As shown in Chart 1, when the timeframe is broadened to consider use of these sources at least weekly, four in five turn to search engines (80%) and seven in 10 to social media (72%) or media sites/internet media (70%). More than half use TV (67%) and messengers (58%) weekly. Only a small proportion (32% weekly) listen to radio for news and fewer still read newspapers (23%).

### CHART 1: SOURCES OF NEWS

% who like to get their news from the following sources (at least weekly)





More women than men like to get their news from social media (78% vs. 65%) and from messengers (64% vs. 51%), but the biggest difference by gender is that substantially more men rely on radio (47% vs. 19%). TV use increases with age, from 55% of 18-34s to 66% of 35-49s and 82% of those aged 50-65. A similar pattern is observed with newspapers: just 14% of 18-34s read newspapers at least weekly, compared with 37% of those aged 50-65. The reverse is true for more modern forms of communication and information. For example, 90% of 18-34s use search engines compared with 62% of the oldest age group, and 83% of the younger group use social media compared with 55% of those aged 50-65. There are also important differences by educational level, with those with higher education less likely to rely on TV and newspapers and more likely to use search engines, news aggregators and messengers.

The broad spread of different sources explains why four in five Ukrainians (80%) say that they receive information from various sources. Only a minority (19%) admit to typically using the same source all of the time. Younger and higher educated respondents were somewhat more likely to use multiple sources. In the focus group discussions, the participants repeatedly stressed that they viewed several channels in order to find out different points of view or to obtain more complete information.

*“If out of five channels one reports one thing and four report something else, then you have to listen to the majority.” (34-year-old man, regional capital, South Ukraine)*

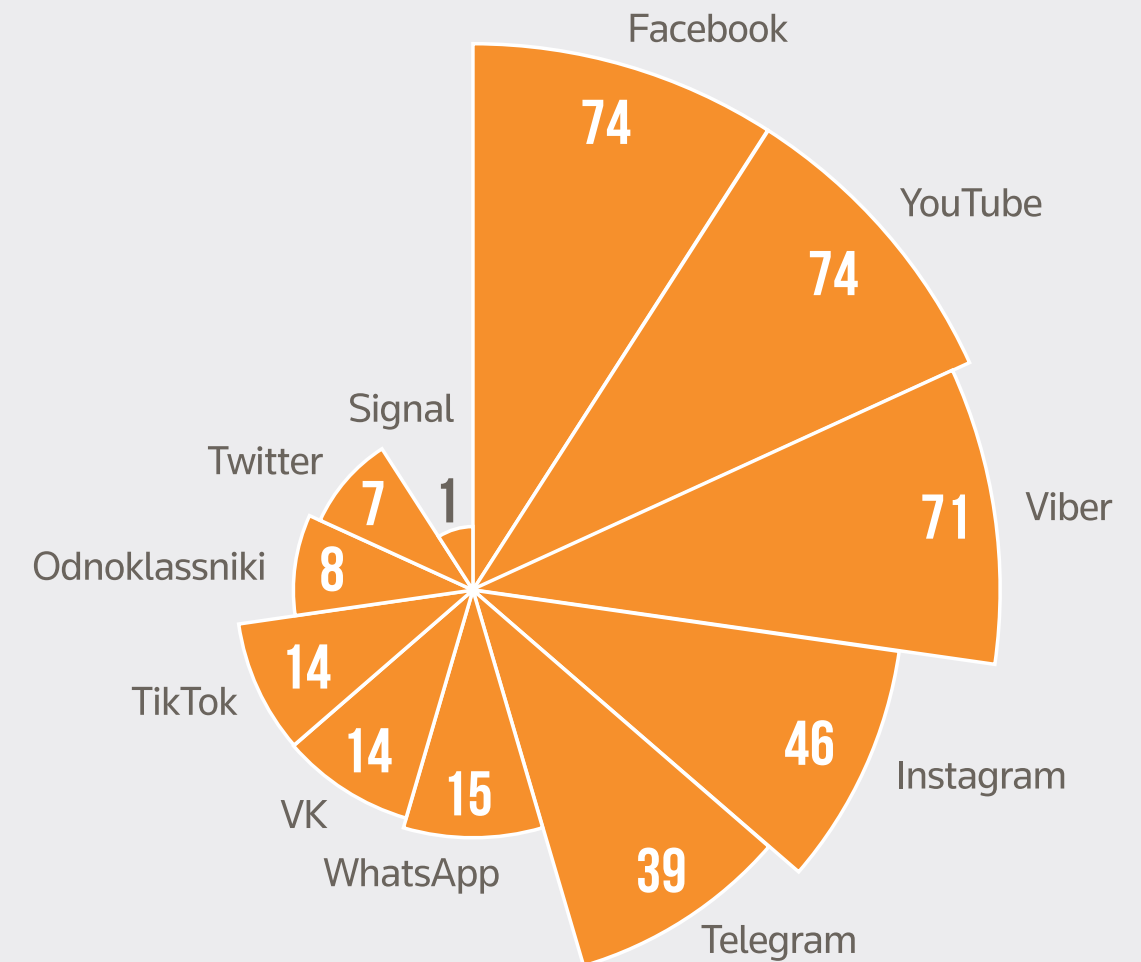
Among those using either social media and/or messengers (82% of adults), three social media platforms stand out as the preferred sources of news and information. Chart 2 shows that Facebook (74% use weekly), Viber (71% use weekly) and YouTube (74% use weekly) are dominant.

The two key gender differences in the use of social media/messengers are that more women than men prefer Instagram (50% vs. 40%), while a greater proportion of men use YouTube (80% vs. 70%).

Use of most social media platforms does not vary greatly by age (among those who use any at all), with the exception of Instagram and Telegram, which are particularly popular among younger adults, and VK, which is more popular among older adults.

## CHART 2: USE OF SOCIAL MEDIA FOR NEWS AND LATEST INFORMATION

% who use each type of social media / messenger to get news and latest information (at least weekly)



The qualitative research provided insights into how people consume media. To some extent this is driven by time of day. For example, TV is more popular in the evenings on weekdays and sometimes in the morning; whereas radio is consumed while driving and sometimes in the background during work or at home.

It is clear from the qualitative research that the internet is growing as an alternative to traditional media, often because of the flexibility of access to news and information, and because local news is less likely to be broadcast through TV channels. At the same time, many reported that they accessed TV-produced content on the



internet, for example through YouTube. This demonstrates the value of promoting multiple and mixed modes of content distribution.

Our research suggests that while the public rely on a wide range of information sources, most do have a favourite source. In total, four in five can name a preferred news source. Interestingly, no single source dominates; the most popular choices continue to be national TV stations owned by oligarchs, which are 1+1 (given by 22%), ICTV (12%) and TRK Ukraine (10%), in addition to news on YouTube (10%).

Those who were able to name a preferred news source were asked the reason for their preference. The top two reasons given were that the source aligned with their personal interests (50%) or that the reporting aligned with their personal values and political views (40%). Lack of advertising (20%), the lack of 'yellow' journalism or sensationalism (both c.20%) and the lack of trust in other news / information sources (18%) are also given as reasons.

Participants in the focus group discussed their reasons for either always using a particular news source or for never doing so. Few said they actively avoided any particular source, mainly because they recognised the benefit of using multiple outlets. In this context, the revocation of the licences of channels 112, NewsOne and ZIK by the decision of the National Security and Defense Council of Ukraine received mixed responses. Some supported these sanctions, but others argued that the channels provided

interesting and different perspectives that should be made available.

The reasons why some sources may not be used, particularly for national or international news, according to the focus group participants were:

- Newspapers: seen as an outdated form of communication, lacking timeliness in providing information. Those who did read newspapers tended to do so as weekly periodicals, largely to satisfy a need for local information
- Television: lack of flexibility in when to watch particular programmes (unless watched online) was cited and there was more scepticism about the veracity of the information provided compared with online sources. Overall, participants felt that the TV channels were more likely to suffer from being partisan and misleading. The presence of advertising and the perception that TV channels serve the interests of their owners were also seen as negatives
- Online sources: to some extent these were also criticised because of the abundance of advertising, spam notifications and clickbait headlines. However, online sources were valued due to the speed of news provision, convenience of access, diversity of information and a greater sense that they could report honestly without censorship



REUTERS/Gleb Garanich



# NEWS ON THE INTERNET

The vast majority of people like to get their news and information from the internet, particularly through social networks and search engines. Therefore, further questions were asked about their behaviour and attitudes to news consumed on the internet. The results are shown in Chart 3.

When asked specifically about how they accessed news on the internet, nine in 10 (88%) said they were interested in social issues reporting in Ukraine. In addition, the majority (57%) did not prefer local/regional news to news about the country as a whole. However, there is a significant difference of opinion related to one's educational level – 37% of those with secondary level education preferred national news, with this increasing to 70% from participants with higher level education.

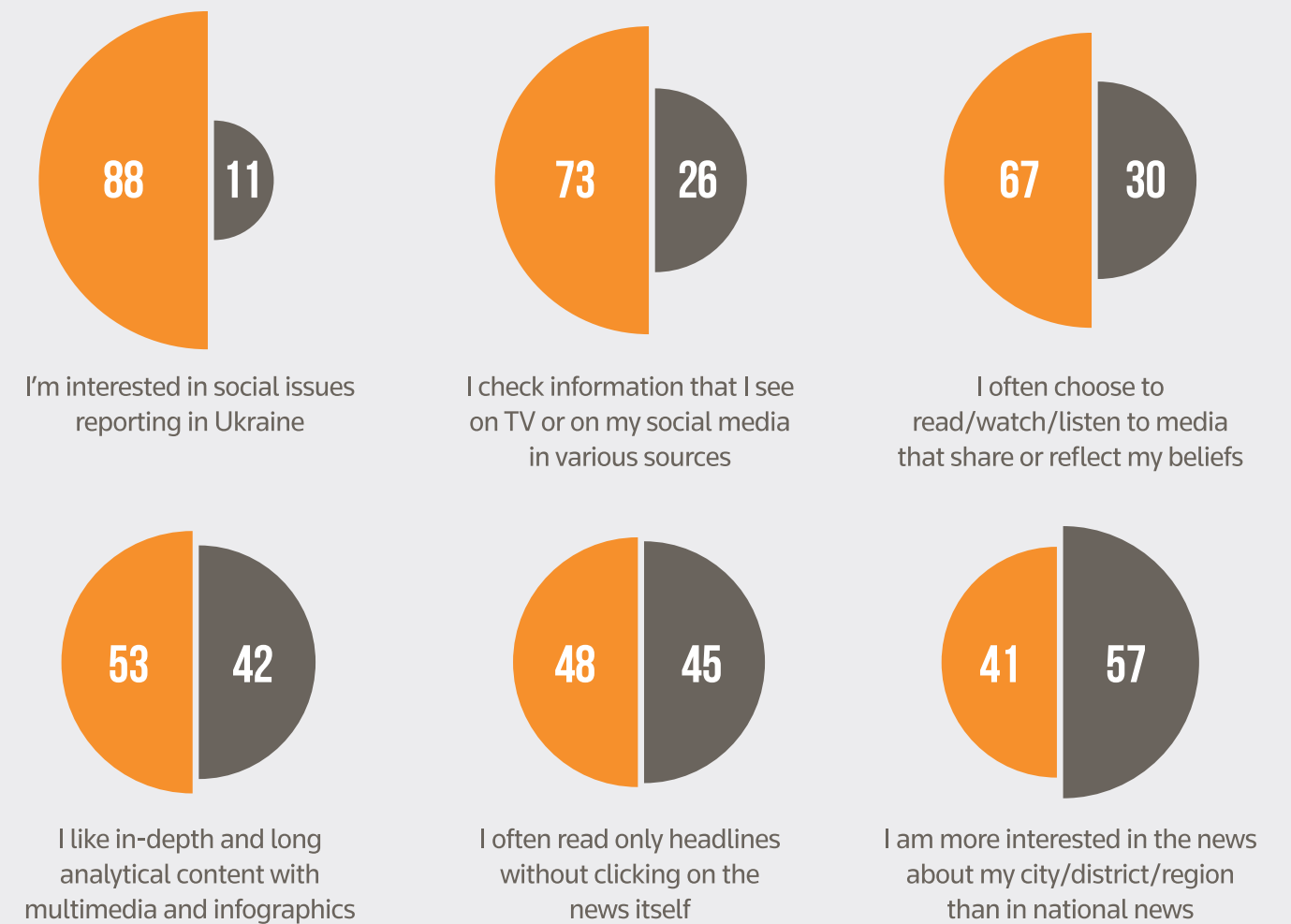
The research also shows that a large majority (73%) of people say they verify news they see on TV/social media, which corresponds with the earlier findings on media consumption showing that most people use a variety of sources. However, respondents were split between those who do (48%) and do not (45%) often read only the headlines, without clicking to read the full story.

There is demand for in-depth reporting: 53% liked it compared with 42% who did not; and

there appeared to be a close relationship between news channels used and personal values and beliefs: twice as many agreed than disagreed with the statement that they often chose media sources that aligned with their values/beliefs (67% vs. 30%).

## CHART 3: READING NEWS ON THE INTERNET

% **agree** or **disagree** with each statement





The main gender difference was that significantly more men than women liked in-depth, analytical content (63% vs. 46%). In addition, men were more likely not to choose media that reflected their beliefs (36% vs. 24%). There was little difference by age, although older adults were less likely to use the internet at all.

People consume news on the internet in different ways, depending on the type of news. Short reports are often consumed on social media channels. If something is of interest and more information is needed, they will search the internet for videos on YouTube or sometimes on TV.

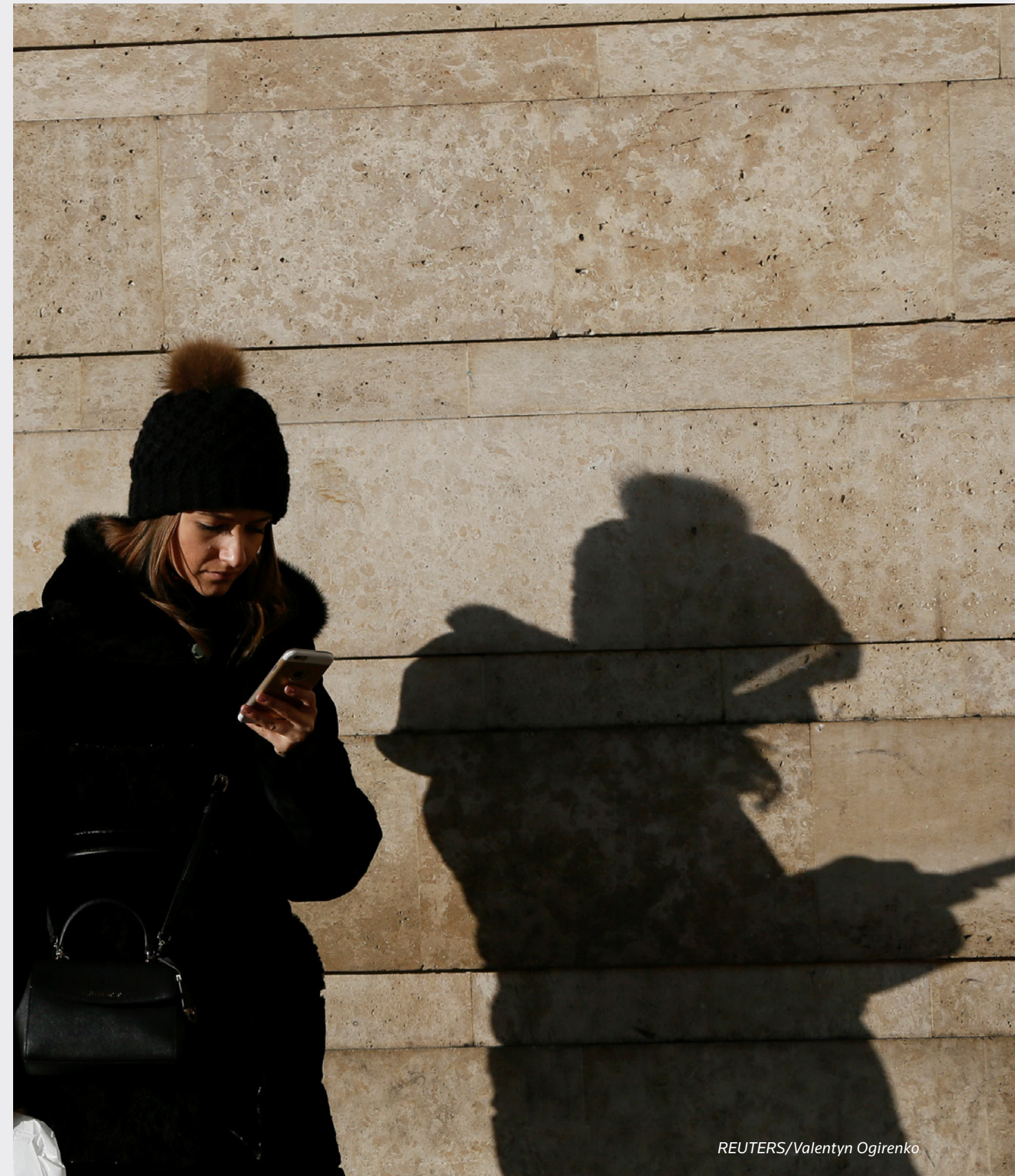
As discussed by the focus group participants, getting news on the internet is done through the online sites of media themselves or through resources in social media. People tend to follow recommendations offered by Google searches and to subscribe to thematic groups provided by social media platforms. For online resources, prompt news and the filtering of information by headlines (e.g. by topic, local/national/international) are appreciated.

Overall, while television still holds ground in Ukraine (67% of respondents used it at least weekly) it is increasingly challenged by social media and the internet. Although TV content can be accessed online, people value reading news and information online because of the ease of access and the type of content: information from online media, bloggers and

social media are considered more truthful and less subject to censorship because mainstream media is seen to be dependent on the owners.

“ IF OUT OF FIVE CHANNELS ONE REPORTS ONE THING AND FOUR REPORT SOMETHING ELSE, THEN YOU HAVE TO LISTEN TO THE MAJORITY.

34-YEAR-OLD MAN,  
REGIONAL CAPITAL, SOUTH UKRAINE







REUTERS/Gleb Garanich

## TRUST IN MEDIA

There is a lack of trust in most news. Only one in 10 (11%) agreed that they trusted most news most of the time. The vast majority partially agreed/disagreed (72%) and a further 17% fully disagreed. Attitudes were similar between men and women, and did not differ by age group. Further detailed statistical analysis reveals that the demographic background of the respondents does not predict levels of trust in the news to any great extent.

When asked to select the channel that they most trusted, half selected online publications and news websites (50%), ahead of TV (41%) and social media (32%). Adults with higher levels of education were particularly likely to trust online publications and news websites (62%).

Reflecting general consumption habits, the sources least likely to be trusted were radio (9%) and newspapers (16%). Women were more likely than men to trust TV (47% vs. 33%). Also reflecting usage patterns, older adults had more trust in TV than younger adults (50% vs. 34%), whereas the reverse was true for online publications (40% vs. 52%), social media (23% vs. 38%) and messengers (8% vs. 18%).

Another way in which trust was considered was in terms of the character of the news provider. There was no clear or majority view.

Public broadcasters (in particular TV) and local independent media were preferred by roughly the same proportion of respondents: 44% and 39% respectively. Fewer (28%) felt that foreign media were the most trusted. Slightly more women trust public service broadcasters (48%), while a higher proportion of men trust foreign media (33%). Trust in public service broadcasters increased with age (from 37% to 53%), but trust in the foreign media decreased with age (from 36% to 20%).

Public broadcasters were more trusted by those with secondary education (50%) than those with higher education (35%). In contrast, foreign media was more trusted by those with higher education (37%) than secondary education (18%).

Chart 4 shows how respondents felt their level of trust in three different types of media had changed over the past three years. Although just over half said their views had not changed for each of the three sources, the remainder were more likely to say trust had fallen rather than increased. This suggests that overall more people are becoming distrustful of the media in Ukraine, which can be seen by the negative net scores. The net score is calculated as the difference between those who say they have “more trust” minus those who have “less trust”. Changes in trust in local independent media and



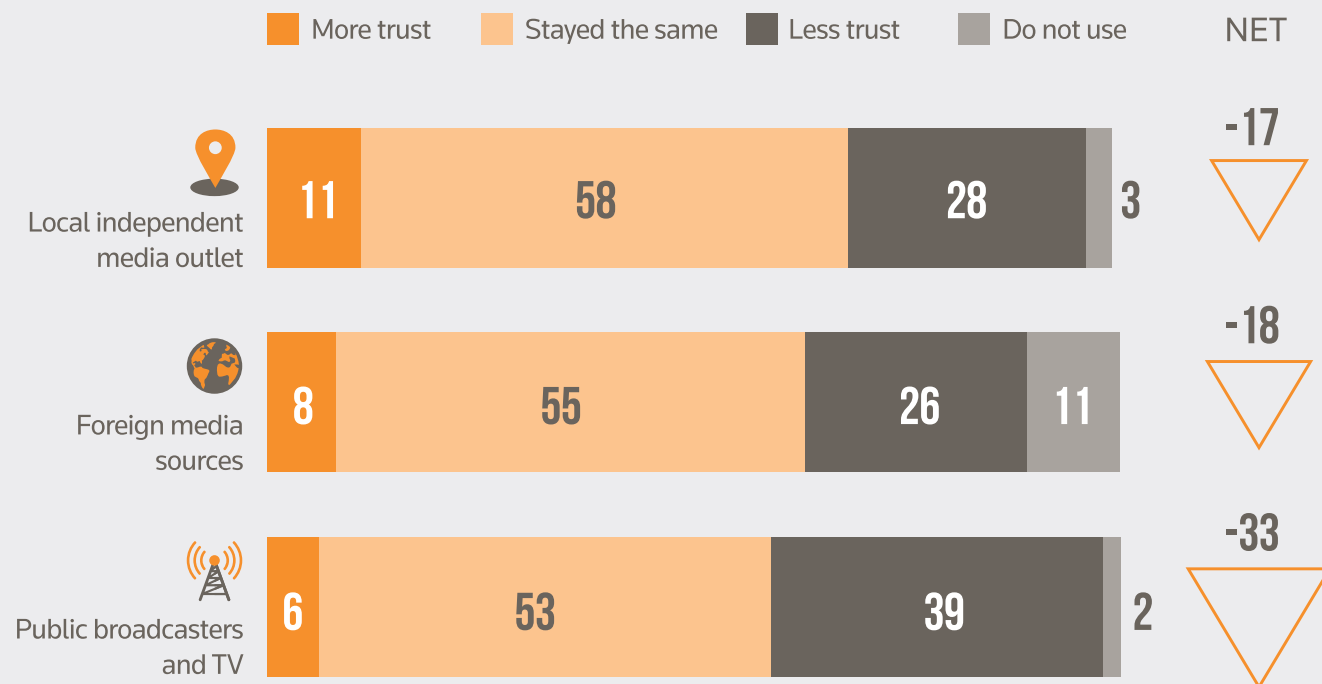
foreign media are very similar, with similar net scores of -17% and -18% respectively. In contrast, many more people distrust public broadcasters: 39% say they trust them less now compared with just 6% who say they trust them more, giving a net score of -33%.

Views are consistent between men and women. Strikingly, older adults are significantly more likely to say their trust in each source has decreased – 45% have less trust in public

service broadcasters, 40% have less trust in local independent media and 37% have less trust in foreign media. Those with lower levels of education consistently say their levels of trust in each type of media has deteriorated over the past three years.

## CHART 4: CHANGE IN TRUST OVER TIME

**Q:** How much, if at all, would you say your trust in each of the following has changed in the past 3 years?



To explore attitudes towards the media in more depth, the survey respondents were also asked their views on the extent to which “fakes and propaganda”<sup>5</sup> are present in the media. This question was asked about different media settings, from news generally to political programmes, and then specifically in relation to experts, commentators and journalists. Chart 5 shows the proportion of adults who agreed with each statement in relation to fakes and propaganda.

Overall, there was widespread agreement that there fakes and propaganda are prevalent in the media. More than four in five felt this was true of political news (84%), political talk shows (83%) and across all kinds of news (82%). Only a small proportion disagreed that fakes exist in these settings.

The respondents were somewhat less likely to agree that invited experts or journalists and TV hosts tell fakes –, but nearly two-thirds (65%) still believed this was the case. Views were broadly consistent between men and women, and between different age groups, though somewhat fewer of those aged 18-34 (52%) agreed that journalists and TV presenters spread fakes. More educated adults were somewhat more likely to think there are fakes and propaganda across the media, although no more or less likely than other adults to think this is the case for experts or journalists.

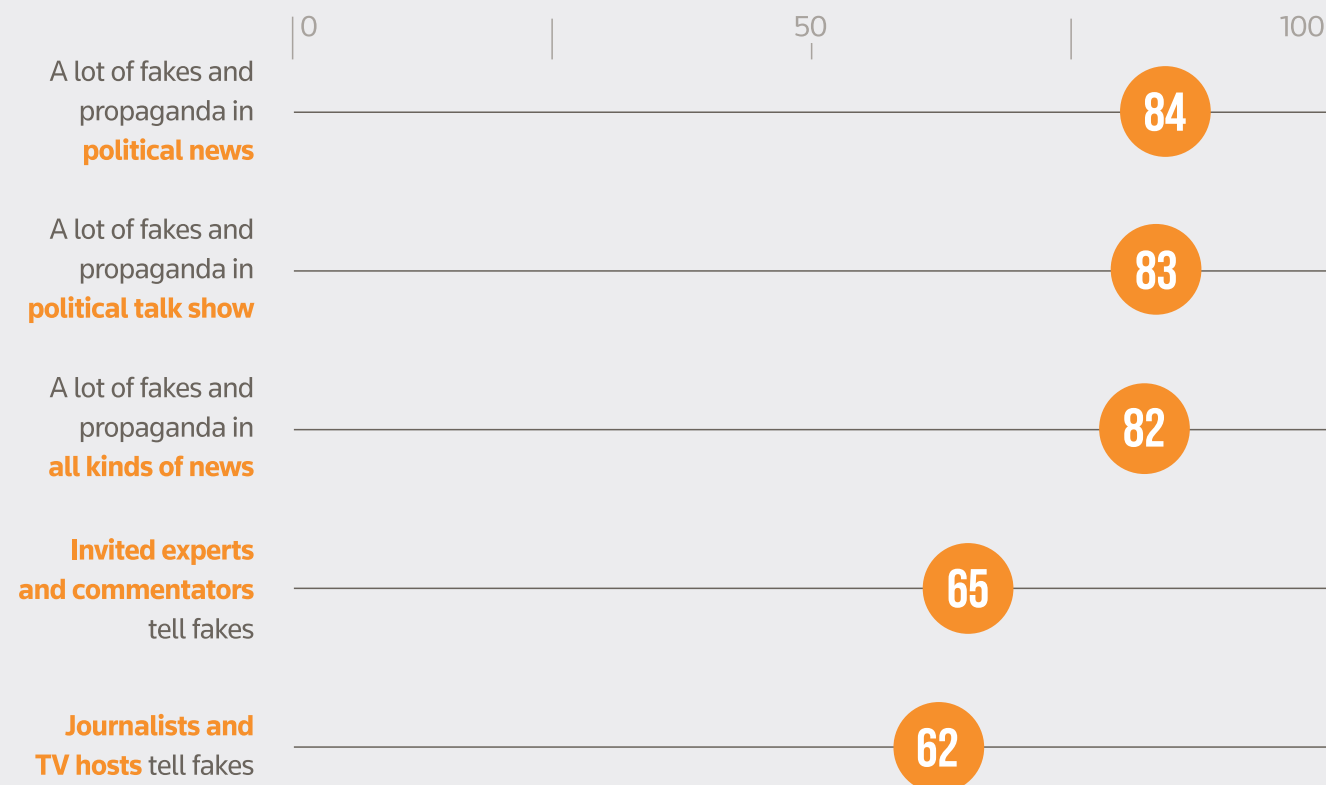


<sup>5</sup> This terminology is widely used in Ukraine and is more easy to understand than concepts such as misinformation, disinformation or mal-information



## CHART 5: FAKES AND PROPAGANDA

% agree with each statement



The focus group participants were asked how they decided whether a news story was fake or not. Generally, people said it was difficult to identify a fake and it could often involve having to cross-check information from various sources, which could be time consuming. Being able to identify the original source of a fact or claim was seen as important. Others said that the media

platform should itself provide a level of trust, but few said they would ever fully trust any one source or platform.

The most common responses from focus group participants explaining why they think there was an abundance of fakes in the media were:

- There are always people interested in distorting information – politicians, oligarchs, authorities, media owners. This can be done as part of the struggle for their interests (including to attract viewers/readers), to divert attention from pressing problems, or to disorient people to make manipulating them easier
- People consume such content, and they do it willingly (because it is interesting or entertaining); they then discuss it with those close to them, thus spreading it further
- There is no penalty for misinformation
- Journalists do not want to investigate, look for the truth, or consider different points of view – it is easier to write an unverified report that will attract attention

There is low trust in the media in Ukraine.

This is not an exceptional finding. Data from Eurobarometer, which covers all 27 members of the European Union, help to put these findings into context. Eurobarometer posed a differently worded question than was used in this survey, and therefore the results are not directly comparable. However, it reports that in autumn 2019, only 10% of EU adults said they “definitely agreed” that the media in their country provide trustworthy information and a further 46% agreed to “some

extent”. Therefore, we would not expect most people in Ukraine to say they “trust the media all of the time”, as scepticism is part of a healthy democracy. The highest proportions of “definite” trust in the EU are found in Denmark, Finland (both 28%) and Sweden (24%).

People compensate for their low trust by using multiple sources, increasingly those found online. Further, while people think there are lots of fakes and propaganda across the news and they say they understand why this happens, many also admit that it is often difficult to identify fake news without spending a lot of time verifying original claims. As such, they recognise that ordinary people, as well as the media, can be responsible for spreading fakes and propaganda.

“ [THEY SPREAD FAKES] FOR THEIR OWN BENEFIT. ANY INFORMATION... CAN LAUNCH A CHAIN REACTION THAT WILL LEAD TO THE RESULT THAT THE PERSON WHO ORDERED THIS INFORMATION WAS AFTER.

23-YEAR-OLD MAN,  
REGIONAL CAPITAL, WEST UKRAINE

“ THE KEY REASON WHY I CONSIDER INFORMATION TO BE TRUE IS THE SOURCE FROM WHICH I GET IT. IF I HAVE CHOSEN A SOURCE... I WILL PARTLY BELIEVE THIS INFORMATION DUE TO THAT.

53-YEAR-OLD WOMAN,  
REGIONAL CAPITALS, SOUTH UKRAINE





REUTERS/Valentyn Ogirenko

## UNDERSTANDING OF INDEPENDENT NEWS

Fewer than half of the adults surveyed had heard of independent media outlets – only 13% were able to name an example of a media outlet that they consider to be independent and a further 32% said they had heard of independent media but were unable to name an example. This means that 56% had not heard of an independent media outlet at all. Adults with higher education were significantly more likely to say they could name an independent media outlet than those with less education.

Some respondents correctly identified the names of several independent media outlets, such as Novoye Vremya, Hromadske TV, Radio Liberty and Novynarnia. However, several also offered outlets such as Espresso TV, ZIK, STB, Nash Channel, Channel 112 and Channel 5 as examples of independent media, when most observers would class them as partisan.

The focus group participants also expressed high levels of scepticism that independent media actually existed. Even when some media labelled themselves as independent, the participants believed that in reality there were few or no properly independent outlets. The primary reason for this scepticism was funding – the rationale that owners fund media to pursue

their goals (political or commercial) and that journalists therefore work in accordance with the interests of the owners, under the supervision of the editors.

Given the above views, independent media are primarily seen as those with few resources, whose activities allow them to operate without financial support from oligarchs or other stakeholders. The result is the perception that these independent media tend to be niche, online platforms whose purpose is to support a particular cause or because of a hobby. In contrast, well-funded media sources (for example TV or newspapers) require substantial resources and therefore are unable to be – or to remain – independent.

The focus group participants discussed their reasons for why they might think a media outlet or journalist was independent. The table below summarises the main reasons given. It is worth noting that even with these suggestions, participants often offer them as independent media without being certain that they are. It is instructive that funding (financial independence) is an important factor, but so are factors around political and/or editorial freedom.



**REASONS FOR CONSIDERING MEDIA TO BE INDEPENDENT**

- Type of funding: more independent if funded by viewers rather than oligarchs. Divided opinions on whether state-funded media are independent
- Covers facts in an objective way
- Shows no clear support for any political force
- Freely able to express their own opinions
- International outlet posing as independent
- Information presented in a way that gives the impression of being independent

Given that few people can name an independent media brand it is not surprising that most Ukrainians do not think there are independent media in Ukraine: 59% believe there are not while a third (34%) believe there are.

In addition, there are mixed perceptions about the nature and function of independent media in the country. Encouragingly, the majority of adults agree that independent media produce news stories and information that is not available on other platforms (70%) and that this type of media act in the interests of the country (58%).

However, in contrast, respondents are almost equally split as to whether independent media provide information that helps people to make decisions (49% agree vs. 48% disagree) or

that they can trust information published by independent media (46% agree vs. 41% disagree).

Perhaps part of the explanation is that, on balance, people do not see independent media as truly independent. Four in 10 (41%) agree that independent media are free from influence of oligarchs, government and foreign states – however, just over half (52%) disagree that this is the case. This statistic probably suggests that people would like independent media to be free from external funding / control, but they feel that this is not realistically achievable.

**CHART 6:  
ATTITUDES TO INDEPENDENT MEDIA**

% **agree** or **disagree** with each statement

In independent media you can often find information that is not found in other media



Independent media tries to act in the interest of the country



Independent media provide up-to-date information to help me make decisions



I trust the information published by independent media



Independent media are free from the influence of oligarchs, government and foreign states



The views of men and women towards independent media are broadly similar, but younger adults are somewhat less likely to agree that independent media can be trusted (40% vs. 54% of older adults) or that it provides information to help decision-making (42% vs. 56%).

The focus group participants were shown two articles about a topical news story: Alexei Navalny’s investigative report, “Putin’s Palace”, which was released just before the focus group discussions took place. Article 1 (Palace Brief) was produced by an independent media organisation and Article 2 (Palace Extended) was produced by a partisan outlet.



The participants discussed the quality of the journalism in both articles and whether they considered either or both of them to be independent. The logos and any branding were removed from the articles so that the media source did not bias how participants responded.

The more common positive reaction was to the short, low-key version (Palace Brief), which was seen as free of 'gossip' or value judgements, with an explanation of the context at the end of the article. At the same time, many participants deemed the longer version (Palace Extended) as more interesting, with confirming photos/diagrams, and comments of the other party, and inspired them to watch the film.

In reviewing the two articles, the participants found it difficult to describe either as completely independent, primarily because their publication clearly benefited A. Navalny. Only one respondent voiced the opinion that any oppositional reporting was independent by default. In addition, despite the photos and diagrams given, doubts were expressed concerning the reliability of the report (it was unclear how the photos of the classified object were obtained; acquaintances from Crimea did not confirm this information, etc.).

While the participants were able to draw conclusions about independence in relation to the media, their assessment of the text as a product of independent or non-independent journalism was largely subjective: the article whose style of

presentation was found to be more appealing was also considered more independent.

“ **JOURNALISTS WHO DO NOT WANT TO SELL THEMSELVES OR DO AS THEY ARE TOLD... THEY ARE INDEPENDENT, THEY ARE HAPPY TO BE THAT WAY, BUT THEY ARE NOT WELL-OFF FINANCIALLY.**

**30-YEAR-OLD WOMAN,  
SMALL TOWN, SOUTH UKRAINE**

“ **YOU COVER SOMETHING NOT THE WAY THEY WANT, THOSE DONORS OR BENEFICIARIES, AND NEXT TIME THEY JUST WON'T FUND YOU.**

**20-YEAR-OLD MAN,  
SMALL TOWN, WEST UKRAINE**



REUTERS/Antonio Bronic





REUTERS/Gleb Garanich

## GOOD JOURNALISM

Participants in the focus group discussions were asked how they would define “good journalism”.

There was a very strong sense that good journalism is important and needed in order that people understand what is happening around them, as the following comment illustrates:

“ WHY IS IT IMPORTANT? WE LIVE IN A WORLD OF INFORMATION. AND INFORMATION DIRECTLY AFFECTS OUR LIFE. THAT IS, SOME OF OUR LIFE PROCESSES MAY DEPEND ON IT. IT IS IMPORTANT TO KNOW THIS IN ORDER TO ADAPT IN TIME, SO IT IS IMPORTANT FOR ME TO UNDERSTAND WHAT IS HAPPENING IN THE WORLD.

26-YEAR-OLD WOMAN,  
REGIONAL CAPITAL, SOUTH UKRAINE

However, people do not automatically equate good journalism with independent journalism. Often, as explained above, independent journalism is perceived to be niche and produced on a low budget. In contrast, good journalism is perceived to have the following qualities:

- **Reliable information:** opinions confirmed with facts, statistics and documents

- **Balanced:** presenting facts and various arguments so that viewers/readers can draw their own conclusions
- **Impartial:** the output is seen as non-partisan and objective
- **Professional:** produced by competent journalists and in an attractive way to capture people’s attention
- **High-quality presentation:** concise and clear (including when it comes to analytics), understandable without trying to cash in on emotions. External/technical attributes of quality (such as TV studio design or camera work) are also sometimes mentioned

As good journalism is often seen as being about high production values, people also recognise that high-quality journalism can also be biased, because they have the funds to produce high quality.

When asked to provide examples of good journalism in the focus group discussions participants typically highlighted individual journalists or bloggers, based on the particular characteristics they were perceived to have, rather than media outlets. These characteristics



include breadth of coverage (giving different sides of a story to show balance or objectivity), providing information not available on other platforms, presenting information in an appealing way or generally being perceived to be trustworthy.

The media outlets that were mentioned by some participants as producing good journalism included the BBC, CNN, Radio Liberty, Ukrainska Pravda, Krym.Realii, Novoe Vremya and Suspline TV.

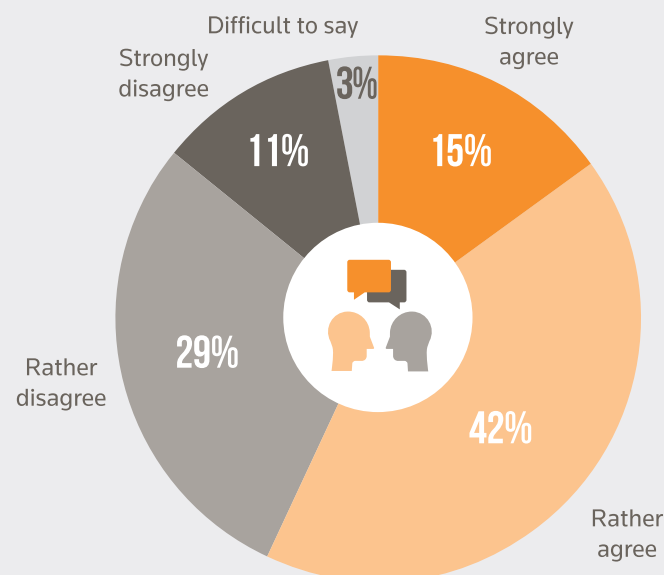
The survey results reveal broadly positive attitudes to some aspects of journalism. Two in three (65%) believe that the journalism they

consume is neutral, detached and objective, although only 7% strongly believe that it is. In contrast, a third (31%) say they do not consume this type of journalism. Of the under-35s, 72% agree the journalism they consume is neutral, detached and objective compared with only 60% of 35s and over.

In addition, as shown in Chart 7, Ukrainians are more likely to agree that the journalism they consume asks tough questions to influential and powerful people – 57% believe this to be true, compared with 40% who do not.

## CHART 7: TOUGH QUESTIONS

“The journalism I consume asks tough questions to influential and powerful people”



Reflecting the generally broad use of different types of news sources, it is encouraging that more than half (58%) say that they often or sometimes watch/read/listen to reports that they do not agree with (and this increases with higher educational levels), which is more than those who say they rarely (34%) or never (7%) do. Slightly more men than women (22% vs. 13%) say they often do this, but general attitudes towards good journalism are consistent between genders.

To help gain a better understanding of how people judge and review good journalism the participants in the focus group discussions were given two short articles. Both articles were produced by the same independent outlet (which was anonymised). The first article (Vaccine) was produced by a journalist who had received support from the TRF Covid-19 Journalist Hub and the second article (Crimea) was produced by the same outlet, but without the journalist having been supported by TRF. The main aim was to try to understand if readers found the first article better researched and balanced.

While the participants did not consider either article to be quality journalism to the fullest extent, the first article (Vaccine) was closer to their idea of what a media report should be like. Article 2 (Crimea) was perceived, in content and style, to be similar to a post on social networks.

The strengths identified in the Vaccine article included its informative value, well-structured data, and confirmation of the content with

statistics. Some regarded the length of the article and its complexity as weaknesses. Readers gave mixed views on the table with data and hyperlinks: some regarded this as an indicator of reliability, but others perceived it as clutter and it reduced their desire to read it to the end. Similarly, the style of presentation produced mixed feelings: some approved of its restraint, brevity, and academic qualities, while others criticised it for a lack of emotional engagement.

The strengths identified in the Crimea article included the relatability of the topic in that it was something happening in Ukraine and it was vividly presented. Nevertheless, readers often pointed to the presence of unnecessary details and the conversational style. Some felt the event could be described more concisely, without resorting to direct speech. And, although the situation described was plausible, doubts were expressed concerning its reliability: the event was described using the account of a journalist who is not widely known, and it lacked confirmation from other sources, such as a video.





REUTERS/Gleb Garanich

## CASE STUDY: MEDIA REPORTING OF COVID-19

Participants in the focus groups were asked for their views on how well the media in Ukraine have reported Covid-19. There was much criticism of the media coverage, driven by the perception that the communication in the initial stages of the pandemic was seen as chaotic, with conflicting messages over time, lack of clear explanation of quarantine restrictions and too much unverified or outright misinformation. The government is also blamed for this.

The result of this, according to the focus group participants, is that many people rely more on their personal experience or the evidence of their immediate environment when thinking about the dangers related to Covid-19 than on what they see in the media. Consequently, those who do not believe Covid-19 is dangerous, or believe it is a hoax (see below), often do so because of their personal experience and distrust of the media. Nevertheless, three in five respondents (61%) reported changing their behaviour as a result of news they have read about Covid-19. While it is always very difficult for people to directly correlate changes in their attitudes or behaviour to particular events or news stories – and perhaps this is even more true in the case of Covid-19, given how dominant an issue it has been over the past year or so – this finding does illustrate the

fact that the majority of people believe that media does influence their behaviour.

The lack of trust in the media arising from its coverage of the pandemic over the last 12 months or so also has an impact on how people receive and whether they trust information about vaccinations. There are many questions and doubts related to vaccination that have not been addressed in a targeted manner, although the emotional intensity of information has been somewhat scaled back. In general, there is fatigue from the prolonged flow of information about the pandemic, and many participants said that they deliberately limited their consumption of such information, avoiding it altogether or only following statistics (the number of Covid-19 cases, the number of those who have recovered, etc.). Some reported tracking the opinions of trusted doctors, such as Ye. Komarovskiy, on the internet, social media, Telegram channels and so on. Several participants suggested that the government and media would have been more successful in communicating if they had made greater use of experts, such as doctors and virologists, especially at the beginning of the pandemic.

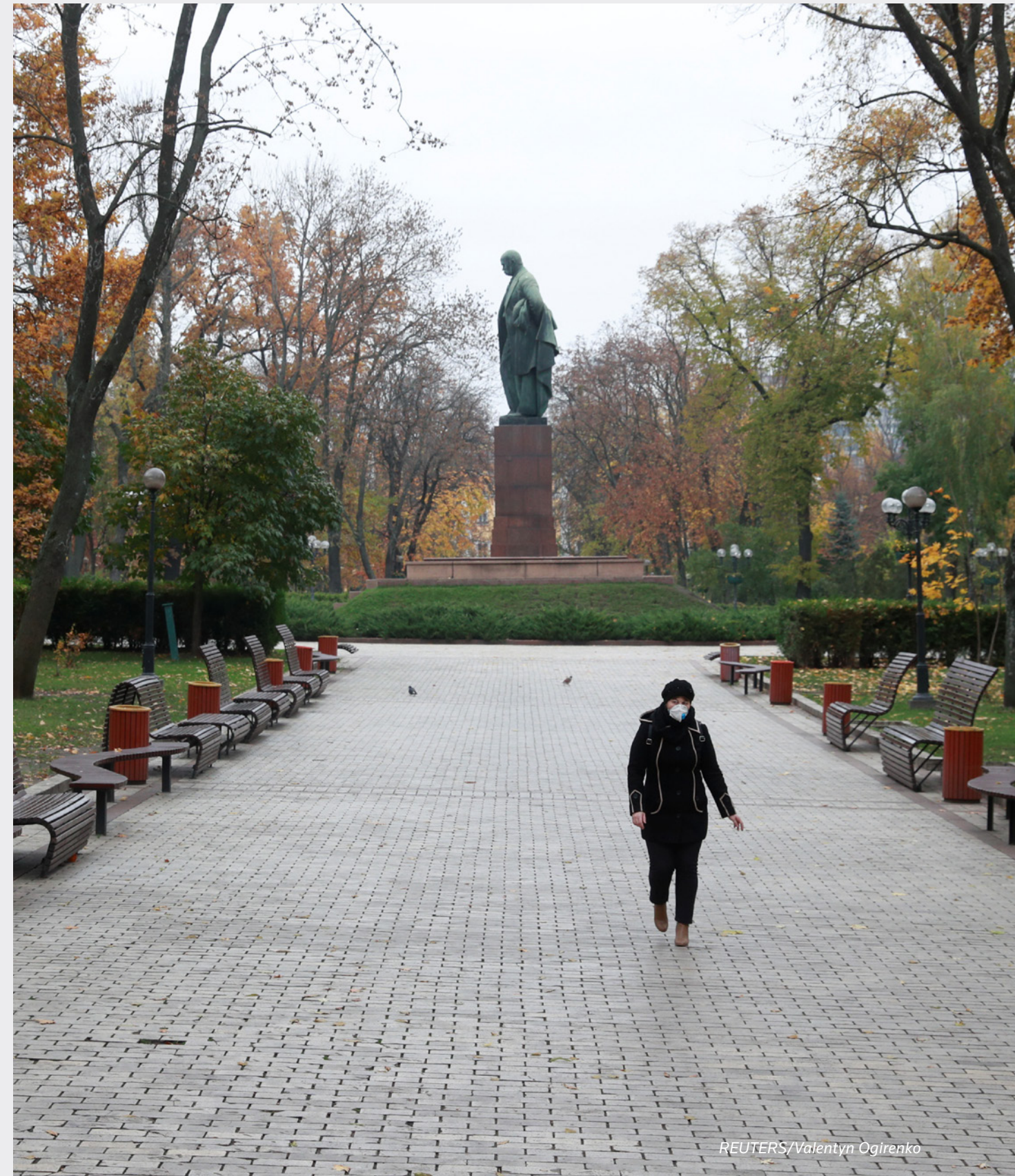


Not everyone blamed the media for the lack of quality coverage of the pandemic. Some said this was because the media had nowhere to go for verified information or truthful statistics, if they had doubts about the official figures. At the same time, several participants in the focus groups felt that the media periodically exaggerated the situation regarding the pandemic on behalf of the authorities in order to justify quarantine restrictions.

Despite the widespread reporting around Covid-19, as many as 17% of respondents believed that Covid-19 is a hoax, as illustrated in Chart 9. Views were broadly shared between men and women, and between age groups. Those who believed Covid-19 to be a hoax tended to be those who were most critical or suspicious of the media, including independent media. For example, Covid-19 deniers were less likely to trust independent media, felt that public broadcasters and local, independent media were becoming less trustworthy, and were more likely to feel that journalists or experts tell lies or spread fakes.

“ **NO ONE WAS PREPARED FOR THIS. THE HEALTH CARE SYSTEM FAILED TO RESPOND ADEQUATELY, THERE WAS NO EQUIPMENT, AND SO ON. THEY WERE PROBABLY AFRAID TO RELEASE THIS INFORMATION, THEY DIDN'T KNOW HOW TO GO PUBLIC ABOUT IT. NEWS OUTLETS RELEASED SOME OF THE INFORMATION THAT WAS GIVEN TO THEM AND WITHHELD SOME OTHER DATA... AND BECAUSE SOME COVERED IT IN ONE WAY, SOME IN ANOTHER AND OTHERS PAINTED A DIFFERENT PICTURE ALTOGETHER... PEOPLE DECIDED IT WAS BETTER TO TRUST THEIR CLOSE ONES.**

**22-YEAR-OLD WOMAN,  
REGIONAL CAPITALS, WEST UKRAINE**



REUTERS/Valentyn Ogirenko





REUTERS/Gleb Garanich

## SOCIAL MEDIA AUDIENCE BEHAVIOUR ANALYSIS

To supplement the quantitative and qualitative research with audiences in Ukraine, a social media listening study was also conducted. This research examined 188 information outlets

across websites, Facebook, YouTube and Telegram channels, as illustrated below.

OUTLET CATEGORY	PLATFORM	NUMBER OF OUTLETS
National general media outlets	Websites	29
Political bloggers	Websites	27
Political discussion	Telegram Channels	24
Regional news outlets	Websites	22
Trending general media	Websites	20
Business news outlets	Websites	18
Political blogs	Facebook	12
Education and professional advancement	Websites	7
Fashion and celebrity news	Websites	7
Business education	YouTube	2



The social media listening study took two approaches to identifying influential information outlets in the Ukrainian digital context.

The first approach relied on social listening software to identify the outlets producing news items trending on a daily basis. Buzzsumo was used to monitor social media sharing trends in Ukraine throughout February. The research homed in on 20 websites (labelled “trending general media” in the table above) that were most commonly found to be the original publishers of the most widely shared posts. The 20 websites represented different types of outlets, such as celebrity/entertainment, local, and international.

Since political news is generally underrepresented in trending lists, a second, more analytical, approach was also used to identify influential politically focused outlets. This approach identified information channels (including websites, Facebook pages, Telegram channels, etc) based on three criteria:

- channels of mainstream political players, defined as those parties and individuals that garner more than the minimum 5% voter support in the 2019 election required to secure parliamentary representation
- new parties/individuals that came close to achieving 5% representation in the 2019 election in a limited space of time
- those outlets or individuals who support political actors but were not themselves

standing for election, including TV channels (operating via websites or Facebook pages), prominent journalists, public personalities, YouTubers and political bloggers

Both of these approaches together resulted in the final list of 188 information outlets, which were then categorised as listed in the table above. Engagement originating from inauthentic bot accounts was identified manually and the findings adjusted accordingly. Excluding such activity prevented the skewing of analysis.

The research team examined the various engagement options available to users on each platform in order to understand the extent to which they denoted trust. Not every marker was present in all platforms, so the team focused on different markers for different platforms.

Facebook: “Shares” were more indicative of trust than “comments” or “reactions”, many of which could be inauthentic, negative or a result of accidental views. The team were also wary of wide discrepancies between the three metrics as they can indicate the use of bots, automated “shares”, or other forms of inauthentic behaviour. Therefore, an indicator for genuine interaction, on the whole, could be when there is a balanced proportion of “comments” and “reactions” to “shares”.

Telegram: The research team concluded, due to the unusual way in which Telegram works, that “views” were indicative of trust. This was

due to the fact that users demonstrate trust in a channel by following it, which then results in higher “views” for the content in those channels. Joining a Telegram channel or group suggests that the user trusts its viewpoint. This is different to general Facebook use, where the platform’s algorithm directs content towards users that they may or may not take notice of.

YouTube: “Views” and “comments” were not deemed reliable markers of trust since “comments” often show signs of automated behaviour and “views” in themselves do not necessarily denote trust due to the way YouTube’s algorithm distributes content. There is also a lively debate amongst YouTubers as to the accuracy of YouTube’s viewer number calculations. As such, the research team took a YouTube channel’s “follower” number as the trust indicator.

The analysis reveals a number of overarching observations:

- Due to the specific conditions in the Ukrainian political environment, vested business interests (oligarchs in particular) are seen as primarily responsible for truth distortion. As such, information consumers invest a great deal of value in knowing where an outlet’s funding comes from
- As a result of audiences’ focus on funding sources, a number of media actors seek to earn trust by demonstrating transparency. However, their output often falls short

in terms of objectivity and balance as many also rely on sensation to attract an audience. This suggests in the Ukrainian context, independence does not equate automatically to high-quality journalism

- For news outlets, this means transparency is important for building trust, though it is not a guaranteed route to attracting an audience. At the same time, extreme transparency can be counter-productive due to the risk of weaponisation by opponents
- Individuals best described as “celebrity bloggers” often score highly when it comes to trust. These individuals, however, often rely on sensation and unsubstantiated opinion
- Some of the more balanced celebrity bloggers have found a formula for presenting political criticism while successfully navigating Ukraine’s stark political divides by couching criticism of Moscow’s policies in expressions of respect for Russian culture
- Celebrity bloggers’ most popular content tends to be revelatory interviews, which inhabit a space between political interview and celebrity drama
- The majority of celebrity bloggers covering political news are men. Their online “brand building” shows a strong inclination towards macho posturing that is designed to appeal to a largely male audience





REUTERS/Valentyn Ogirenko

## RECOMMENDATIONS

Traditional media is being overtaken as a source of news and information by the internet and social media. TV remains very important for many people and some consume TV content through the internet, but the public has increasing choice about how they access news and information and are frequently choosing to do through social media and digital platforms.

Very few people have complete trust in the media in Ukraine. This is not necessarily surprising or concerning so long as people do have information sources they can trust and that provide objective news and analysis. There is clearly a strong desire for honest, impartial and professional content. However, it is less clear that there is sufficient supply of this.

The lack of public trust is partly driven by the sense that the media is not independent of external sources, be they the government or business owners / oligarchs. Rightly or wrongly, most people do not think that state-owned or oligarch-owned media can be properly independent. Public evaluations of how the media has reported on the Covid-19 pandemic have most likely increased scepticism about the quality and motivation of many media outlets.

This context provides significant challenges to properly independent media. People in Ukraine are doubtful that independent outlets actually exist, or believe those that are independent are niche or low-quality outlets, or conflate them with those organisations that share their opinions. This is compounded by the fact the people want high-quality independent media, but believe that is expensive to produce and is likely therefore to be controlled by outside interests.



The evidence generated through this research suggests that those interested in strengthening independent media should consider the following:

#### Wider media development recommendations

##### 1) Create a shared definition of independent media within the sector.

Future programming should try to create a shared definition and way of articulating what independent media is, and seek to encourage all independent media to use this definition publicly on their platforms. Once in place independent media should conduct a collaborative awareness campaign to publicise this to their audiences in a consistent and coherent manner to increase audience knowledge of the advantages of independent media.

##### 2) Increase public awareness of what independent media is and how it can be identified.

This could include a country-wide marketing campaign to explain the definition of independent media and why it is important, and more targeted campaigns to improve media literacy in schools and universities.

##### 3) Engaging associations and media NGOs.

Journalism associations and NGOs could be the standard-bearers driving the media to commit to this definition and implementing the Ukrainian Journalism Code of Ethics.

##### 4) Utilising the Ukrainian Journalist Code of Ethics.

Our research suggests that audiences are seeking good journalism, but do not always associate this with independent media. Future journalism and media development programmes should promote the Ukrainian Journalist Code of Ethics as a starting point of mentorship and ensure all individuals and organisations striving toward independence and good journalism embed these ethics in their work and ways of operating.

##### 5) Continued training and mentorship in content improvement.

Continue to provide training on how to produce objective and balanced content, together with support to ensure that the presentation is appealing and engaging both in terms of professionalism and production quality.

#### Recommendations for media and journalists

##### 1) Focus on quality and impartiality.

Audiences are seeking impartial, reliable, and balanced journalism. Outlets and individuals should focus on quality rather than quantity to ensure that they produce content which audiences perceive as good journalism. Independent journalists should separate reporting of facts and statistics from their own interpretation and, where possible, provide audiences with a diversity of views.

##### 2) Personalising independent media branding.

Audiences have greater trust in individuals, either experts or journalists. Organisations should consider how they can personalise their brand. In particular digital media, who do not have a public individual such as a news anchor, should identify ways in which their audience can familiarise themselves with their team of journalists. This could be open editorial meetings and biographies on websites.

##### 3) Ensuring you have trusted sources.

In tandem, independent media should consider how to make better use of experts and trusted journalists who may be in a better position to enhance the trustworthiness of their content and support the development of trusted relationships with different audiences.

##### 4) Multiple distribution options.

Ensure content produced is easily accessible, especially across different digital platforms. In the case of Ukraine this would include Facebook, YouTube and Viber. Independent media outlets should also be supported so that their content can be found on search engines and aggregators, for example through search engine optimisation, link words, meta tags and key words.





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