InMind carried out this study at the request of the international non-governmental organization Internews, implementing the Media Program in Ukraine with the financial support of the United States Agency for International Development (USAID).

November 2023
**Study design**

### Annual survey using quantitative and qualitative methods of information collection

<table>
<thead>
<tr>
<th><strong>Stage 1</strong></th>
<th><strong>Stage 2</strong></th>
<th><strong>Stage 3</strong></th>
<th><strong>Stage 4</strong></th>
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</thead>
</table>
| Baseline focus group discussions, N=4 | Main stage involving a nationwide survey at interviewees' homes in cities of 50K+, N~3,250 | Interpretive focus group discussions, N=6 | Focus group discussions (FGD) and in-depth interviews with special population groups:  
- Rural inhabitants (2 FGD)  
- Internally Displaced Persons (3 FGD)  
- Refugees temporarily living abroad (refugees) (36 interviews)  
- Service members located in areas of hostilities and in other field positions (20 interviews)  
- Residents of territories that are under temporary occupation, besieged, and/or where there are hostilities (15 interviews) |
| Identifying new trends in media consumption | Measuring key indicators of media consumption, trust in the media, and media literacy | Discussing the results of the quantitative stage to enrich potential analytical interpretations | Determine the specificities of media consumption, trust in the media, and media literacy for special population groups |
| Drafting recommendations concerning changes to be introduced in the quantitative stage questionnaire, accounting for potential trends | | | |

**Stage 4**

- Focus group discussions (FGD) and in-depth interviews with special population groups:  
  - Rural inhabitants (2 FGD)  
  - Internally Displaced Persons (3 FGD)  
  - Refugees temporarily living abroad (refugees) (36 interviews)  
  - Service members located in areas of hostilities and in other field positions (20 interviews)  
  - Residents of territories that are under temporary occupation, besieged, and/or where there are hostilities (15 interviews)
Summary. Use of and Trust in the Media

Key Findings (1)

Use of the Media

In 2023, news consumption remains at the same level as last year for all media types - except for TV consumption, which continues to decrease.

47% of Ukrainians use several types of media to get news; if they use only one source, it is usually a social network.

Social networks are the most popular news source among Ukrainians aged 18-35, while Ukrainians over 46 make up the majority of TV, radio, and print media news consumers.

Of the 80% of interviewees who know about the United News telethon, 45% of them watch it weekly.

1+1 / TSN is the most popular TV channel for news, and one of the popular news pages and channels on Facebook and YouTube.

In 2023, Telegram remains the main social network for communication and news consumption, showing considerable growth in both categories. In contrast, Facebook has seen a decline in audience reach and news consumption. Viber shows increased audience reach, but news consumption statistics remains unchanged from 2022. TikTok has increased both in terms of communication and news.

What media have you used within the past 30 days to get news? 2015-2023, % of the total

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<tbody>
<tr>
<td>TV</td>
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<td>41%</td>
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<tr>
<td>Radio</td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>30%</td>
</tr>
<tr>
<td>Print</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>10%</td>
</tr>
<tr>
<td>News sites</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>76%</td>
</tr>
<tr>
<td>Social networks</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
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<td>4%</td>
</tr>
</tbody>
</table>

Use of the Social Networks

The number of those who use the internet every day increases every year. In 2023 the figure was 89%, with 98% of young people aged 18-35 reporting that they use the internet every day.

87% of the audience use smartphones to consume news, while among young people aged 18-35 this figure is 97%.

What social network do you mostly use to get news? 2022-2023, % of users

<table>
<thead>
<tr>
<th>Social Network</th>
<th>National</th>
<th>Regional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>59%</td>
<td>58%</td>
</tr>
<tr>
<td>TikTok</td>
<td>60%</td>
<td>53%</td>
</tr>
<tr>
<td>Viber</td>
<td>72%</td>
<td></td>
</tr>
<tr>
<td>Telegram</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>News sites</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>YouTube</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td>Print</td>
<td>24%</td>
<td>23%</td>
</tr>
<tr>
<td>TV</td>
<td>49%</td>
<td>44%</td>
</tr>
<tr>
<td>Radio</td>
<td>28%</td>
<td>27%</td>
</tr>
</tbody>
</table>

Trust in the Media

The most trusted news sources are the most popular - 59% of interviewees trust news on social networks, 56% trust national news online, and 49% trust national television news.

In 2023, the level of trust in both national and regional radio increased, as did trust in print media. The main reasons for growing trust in radio were the disappearance of pro-Russian radio stations, the absence of Russian music, and increased presence of the news content on music stations.

What social network do you mostly use to get news? 2022-2023, % of users
Summary. Media audience

Key findings (2)

National news consumption decreased significantly for all types of media this year, most of all for print media.

Social networks audience - 76% of the total

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

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</thead>
<tbody>
<tr>
<td>National</td>
<td>77%</td>
<td>63%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regional</td>
<td>62%</td>
<td>61%</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>International</td>
<td>20%</td>
<td>16%</td>
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</tbody>
</table>

The most popular news outlets on social networks:
- Telegram – Trukha Ukrayinya, Ukrayina Seichas, Lechen pyshe, TSN news;
- Facebook – TSN, Ukrayinska Pravda, Suspilne Novyny;
- YouTube – STERNENKO, 24th Channel, TSN, Ukrayinska Pravda;
- Viber – Blyskavka, Krayina.Info.

Ukrainians mostly follow bloggers and opinion leaders such as Serhii Sternenko, Serhii Prytula, Volodymyr Zelenskyy.

News sites audience - 41% of the total

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

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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>93%</td>
<td>91%</td>
<td>90%</td>
<td>92%</td>
<td>89%</td>
<td>84%</td>
<td>85%</td>
<td>83%</td>
<td>69%</td>
</tr>
<tr>
<td>Regional</td>
<td>28%</td>
<td>31%</td>
<td>31%</td>
<td>42%</td>
<td>33%</td>
<td>29%</td>
<td>27%</td>
<td>55%</td>
<td>54%</td>
</tr>
<tr>
<td>International</td>
<td>11%</td>
<td>19%</td>
<td>24%</td>
<td>24%</td>
<td>19%</td>
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</tbody>
</table>

The most popular sites for getting the news are Ukr.net, UNIAN (unian.net), 1+1/TSN (1plus1.ua, tsn.ua) and Ukrayinska Pravda (pravda.com.ua).

Regional news sites are more popular among the residents of eastern regions.

Television audience - 30% of the total

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

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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>99%</td>
<td>99%</td>
<td>99%</td>
<td>99%</td>
<td>99%</td>
<td>95%</td>
<td>94%</td>
<td>89%</td>
<td>78%</td>
</tr>
<tr>
<td>Regional</td>
<td>43%</td>
<td>44%</td>
<td>39%</td>
<td>45%</td>
<td>30%</td>
<td>28%</td>
<td>27%</td>
<td>44%</td>
<td>45%</td>
</tr>
<tr>
<td>International</td>
<td>4%</td>
<td>10%</td>
<td>8%</td>
<td>11%</td>
<td>7%</td>
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</table>

The leaders in national news broadcasting are 1+1, ICTV, STB, and Inter. Residents of western regions get the news from national television channels more often than those living in other regions.

Radio audience - 10% of the total

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

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</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>87%</td>
<td>90%</td>
<td>93%</td>
<td>92%</td>
<td>91%</td>
<td>82%</td>
<td>76%</td>
<td>69%</td>
<td>58%</td>
</tr>
<tr>
<td>Regional</td>
<td>27%</td>
<td>28%</td>
<td>25%</td>
<td>27%</td>
<td>22%</td>
<td>27%</td>
<td>31%</td>
<td>56%</td>
<td>58%</td>
</tr>
<tr>
<td>International</td>
<td>2%</td>
<td>6%</td>
<td>6%</td>
<td>8%</td>
<td>6%</td>
<td></td>
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</tbody>
</table>

Radio news consumers listen to both national and regional radio stations. The most popular national radio stations for news are Lux FM, HIT FM, and Ukrayinske Radio.

Print media audience – 3% of the total

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

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</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>61%</td>
<td>55%</td>
<td>50%</td>
<td>58%</td>
<td>56%</td>
<td>45%</td>
<td>54%</td>
<td>42%</td>
<td>22%</td>
</tr>
<tr>
<td>Regional</td>
<td>63%</td>
<td>70%</td>
<td>68%</td>
<td>69%</td>
<td>65%</td>
<td>67%</td>
<td>57%</td>
<td>71%</td>
<td>81%</td>
</tr>
<tr>
<td>International</td>
<td>2%</td>
<td>7%</td>
<td>7%</td>
<td>11%</td>
<td>5%</td>
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</tbody>
</table>

Print media's audience is small, consisting mostly of Ukrainians over 56 years old.
Summary. Media literacy

Media literacy

In 2023, interviewees’ awareness of hidden advertising remained at the same level as in 2022, but the share of interviewees who believe they can identify such content decreased from 72% to 67%.

According to interviewees, one of the most frequent signs of news authenticity is the reliability of the source – 37% of the interviewees pay attention to this. However, 42% of interviewees trust their favorite media “by default” or use their gut senses to assess the news.

1. Do you know that media sometimes publish hidden advertising presented as regular content? 2015-2023, % of the total

   - 2015: 20%
   - 2016: 25%
   - 2017: 24%
   - 2018: 23%
   - 2019: 22%
   - 2020: 20%
   - 2021: 19%
   - 2022: 18%
   - 2023: 17%

84% of interviewees are aware disinformation exists and most believe that they can identify it. At the same time, 57% of the audience thinks disinformation is not a critical problem.

2. Do you know that media sometimes publish disinformation? 2019-2023, % of the total

   - 2019: 80%
   - 2020: 78%
   - 2021: 76%
   - 2022: 74%
   - 2023: 72%

About 40% of interviewees discussed those narratives with their friends and families.

They shared similar narratives most frequently to find out what others think about such information.

Disinformation

The share of people who had heard prevalent false narratives ranged from 56% (“Western sanctions have no effect”) to 26% (“Ukrainian authorities provoked a divide in the Christian church”).

According to interviewees, the most believable narratives were: “Western sanctions have no effect,” “Western weapons and assistance are not used for their intended purpose,” and “Corrupt Ukrainian authorities want the war to go on for personal gain.”

The least believable narrative is about the impossibility of Ukraine’s victory over Russia because it is a very large and powerful country.

3. What do you think about the following narratives? 2015-2023, % of the total

   - 2015: 52%
   - 2016: 50%
   - 2017: 48%
   - 2018: 46%
   - 2019: 44%
   - 2020: 42%
   - 2021: 40%
   - 2022: 38%
   - 2023: 36%

War coverage in the news

Most interviewees – 74% – believe that they get enough or even too much content about the war.

65% of the audience trusts news about the war, believing it to be timely, reliable information and it adequately analyzes the events of the war.

Despite the ongoing war, people say that they are not tired of the news about it – in 2023 this figure reached 58%.

Russian media

Personal consumption of Russian media continues to decline – only 8% of the interviewees used Russian media in 2023.

The share of Russian media consumers in respondents’ personal networks has also decreased significantly – down to 16%.

The main reason for using Russian media is to find out what they say about Ukraine.

Ukrainians still use Russian social networks (5%) and news sites (3%) to get the news, but the level of trust in those media is quite low.
Media Consumption
In 2023, the majority of interviewees (76%) gets the news from social networks and one in three Ukrainians only turns to social networks for news.

About 40% of the audience gets the news from news websites, 30% - from TV. Radio and print media are hardly ever used as the main source of news.

Most interviewees use their smartphones to get the news.

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

Base: Total sample, N=1,534
Dynamics of media activity. 2015-2023

News consumption by types of media remained at the same level as last year for all media except TV, which continued to decrease.

The main trend, as in recent years, continues to be getting news from social networks via smartphone.

Questions:
What media have you used in the past 30 days to get news?

Base:
Total sample, 2015-2021 N=1,600/wave
2022 N=1,450
2023 N=1,534

x × x – significantly more/less at 95% as compared to the previous wave
Internet vs television. 2015-2023

Daily internet use

The number of daily internet users continues to grow from year to year. In 2023, this figure reached 89%, and among people aged 18-35, 98% reported daily internet use.

Internet (news sites and social networks) news consumers who do not watch the news on TV make up 66% of the audience.

Questions:
How often do you generally use the internet? - % of daily users
What media have you used in the past 30 days to get news?

Monthly use of media to get news

Base:
Total sample, 2015-2021 N=1,600/wave
2022 N=1,450
2023 N=1,534

x/x - considerably more/less at 95% as compared to the previous wave
Perception of news and news media

(by focus groups results)

There is a significant decrease in news consumption among focus group participants, compared to the beginning of the war when they followed the news 24/7. Interviewees are gradually returning to every day concerns related to their personal lives and to the permanent jobs they might have lost when the war began. The situation at the frontline has stabilized and there is finally confidence that “Ukraine will win.” On average, interviewees spend 2-3 hours a day getting the news.

Focus group participants primarily use their smartphones to get news and their main news source is Telegram channels. Additionally, they use other social networks, different sources on YouTube (various TV channels, opinion leaders’ and experts’ personal channels), and online news sites.

Older Ukrainians watch TV to get the news. The number of older Ukrainians also using Telegram channels for the news is on the rise. Middle-aged interviewees consume TV news in certain situations - at breakfast, dinner, or on the weekend. The youngest interviewees reported rarely watching TV or not having one at all.

In terms of usage, laptops and tablets are in third place used by interviewees for work or study.

Radio takes last place. It is used primarily in transport (personal cars, taxis, minibus). Interest in radio grew considerably during blackouts when it was the only source of information.
Perception of news and news media

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

❑ **INTERNALLY DISPLACED PERSONS IN UKRAINE**

Internally displaced persons have adapted to their new places of residence, found jobs, are able to pay rent on their own, and have all the same devices that they used in their houses prior to the war and relocation. Their media consumption today is almost indistinguishable from the media consumption of area residents.

❑ **INHABITANTS OF OCCUPIED TERRITORIES and/or WHERE THERE ARE HOSTILITIES**

Interviewees get necessary and important information through Telegram news channels. Residents of occupied territories don’t have access to Ukrainian television but are able to watch Ukrainians news on YouTube. They also have no access to Ukrainian radio, but according to the interviewees, it is not a relevant source for getting news.

The main device for consuming news is still a cell phone. This is due to a sense of security because in critical circumstances, a cell phone is easy to "clean" - in a few clicks one can remove dangerous applications, information channels, clear the search history, and protect themselves. Some interviewees have a separate phone for getting news. Convenience also plays an important role – a cell phone is always at hand and can be easily charged with a power bank and taken to the shelter in case of missile attacks.
Perception of news and news media

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

■ REFUGEES ABROAD

The vast majority of interviewees prefer Ukrainian news sources and completely or partially ignore news from their current countries of residence (except for news about refugees, rallies, and gatherings of Ukrainians). The language barrier often prevents people from consuming local news. In addition, interviewees are largely not interested in their host country’s internal politics, and the war in Ukraine is covered less and less by the news abroad and it becomes more generalized over time.

The most popular device for the news is a smartphone, in particular, because of its accessibility, as a significant number of refugees do not have a TV in their place of residence or own other devices. Only those who live with “hosts” (local residents) watch host country television.

■ SERVICE MEMBERS

Soldiers on the front line do not have the opportunity to consume news on a daily basis because they perform combat missions and keep their devices turned off. In these cases, they get news only after they return (after 1-8 days). Soldiers in the rear have consistent access to news and consume it every day.

Most soldiers use smartphones to get news. On the front line, there are no difficulties accessing news thanks to Starlink and mobile internet, which is available even in destroyed villages. Laptops and tablets are in second place – they are often used for military tasks and then after work for consuming news. Only a few interviewees mentioned TV, which they watched ad hoc during vacations. For many soldiers, the commander or press service of their unit/battalion, if available, is a considered an important source of information.
Interviewees who get their news from social networks and radio rely on national and regional sources equally. Interviewees who prefer television and news sites turn to national sources more often than regional ones, while those who consume print media largely use regional sources.

**Breakdown of media types used by news consumers**

<table>
<thead>
<tr>
<th>Media Type</th>
<th>National Media</th>
<th>Regional Media</th>
<th>International Media</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social networks</td>
<td>63%</td>
<td>16%</td>
<td>5%</td>
</tr>
<tr>
<td>News sites</td>
<td>69%</td>
<td>19%</td>
<td>7%</td>
</tr>
<tr>
<td>Television</td>
<td>78%</td>
<td>45%</td>
<td>7%</td>
</tr>
<tr>
<td>Radio</td>
<td>58%</td>
<td>58%</td>
<td>6%</td>
</tr>
<tr>
<td>Print media</td>
<td>22%</td>
<td>81%</td>
<td>5%</td>
</tr>
</tbody>
</table>

**Questions:**
What social media news pages/channels have you visited in the past 30 days? (Similar question for sites/online sources, TV radio and print media)

**Base:**
Consumers of news from this type of media
Dynamics of consumption of different types of media. 2015-2023

<table>
<thead>
<tr>
<th>Type of Media</th>
<th>National</th>
<th>Regional</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social networks</td>
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<td><img src="image2" alt="Graph" /></td>
<td><img src="image3" alt="Graph" /></td>
</tr>
<tr>
<td>News sites</td>
<td><img src="image4" alt="Graph" /></td>
<td><img src="image5" alt="Graph" /></td>
<td><img src="image6" alt="Graph" /></td>
</tr>
<tr>
<td>Television</td>
<td><img src="image7" alt="Graph" /></td>
<td><img src="image8" alt="Graph" /></td>
<td><img src="image9" alt="Graph" /></td>
</tr>
<tr>
<td>Radio</td>
<td><img src="image10" alt="Graph" /></td>
<td><img src="image11" alt="Graph" /></td>
<td><img src="image12" alt="Graph" /></td>
</tr>
<tr>
<td>Print media</td>
<td><img src="image13" alt="Graph" /></td>
<td><img src="image14" alt="Graph" /></td>
<td><img src="image15" alt="Graph" /></td>
</tr>
</tbody>
</table>

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

**Base:**
Consumers of news from this type of media

x / x – significantly more/less at 95% as compared to the previous wave
### News sites

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

<table>
<thead>
<tr>
<th>News services</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ukr.net / (Ukr.net)</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>UNIAN (unian.net)</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Google</td>
<td>33%</td>
<td>5%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Websites</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>TSN (tsn.ua) / 1+1 (1plus1.ua)</td>
<td>21%</td>
<td>12%</td>
</tr>
<tr>
<td>Ukrainska pravda (pravda.com.ua)</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>24th channel (24tv.ua)</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Censor.net (censor.net)</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Korrespondent (korrespondent.net)</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Obozrevatel (obozrevatel.com)</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Ukrinform (ukrinform.ua)</td>
<td>0,3%</td>
<td>2%</td>
</tr>
<tr>
<td>RBK-Ukrayina (rbc.ua)</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Novyny Ukrayiny (mediaua.com.ua)</td>
<td>5%</td>
<td>2%</td>
</tr>
<tr>
<td>Suspine (suspine.media)</td>
<td>0,1%</td>
<td>2%</td>
</tr>
<tr>
<td>Fakty (fakty.ua)</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Liha.net (liga.net)</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Hromadske. TV (online)</td>
<td>5%</td>
<td>1%</td>
</tr>
</tbody>
</table>

**Consumption of news on national websites**

<table>
<thead>
<tr>
<th></th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td></td>
<td>10%</td>
<td>7%</td>
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<tr>
<td></td>
<td>33%</td>
<td>5%</td>
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<td>21%</td>
<td>12%</td>
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<td>8%</td>
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<td>0,1%</td>
<td>2%</td>
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<td>3%</td>
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<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td></td>
<td>5%</td>
<td>1%</td>
</tr>
</tbody>
</table>

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

**Base:**
Consumers of news from this type of media
2022 N=511, 2023 N=428

x / x – significantly more/less at 95% as compared to the previous wave
National media used for news. 2023

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

Consumption of news on national radio

- Ukryinske radio: 19% in 2022, 21% in 2023
- Lux FM: 20% in 2022, 20% in 2023
- Hit FM: 13% in 2022, 18% in 2023
- Radio NV: 8% in 2022, 10% in 2023
- Nashe radio: 10% in 2022, 10% in 2023
- Pyatnytsi: 4% in 2022, 9% in 2023
- Radio ROKS: - in 2022, 7% in 2023
- Melodiya: 4% in 2022, 5% in 2023
- Shanson: 7% in 2022, 5% in 2023
- Kiss FM: 7% in 2022, 5% in 2023
- Radio Bayraktar: 6% in 2022, 3% in 2023
- Avtoradio U kray ina: 10% in 2022, 3% in 2023

Questions:

Name up to three national TV channels on which you watch the news most often.
Name up to three national radio stations the news on which you listen to most often.
Dynamics of media consumption

(by focus group results)

Before the war, interviewees generally were not interested in the news and spent very little time consuming it – most of their time was spent on entertainment content. After the start of the full-scale invasion, Ukrainians completely changed and began regularly consuming information about the war from various sources.

After a year and a half of war, interviewees feel addicted to war-related news, but report reacting more calmly to news of tragic events. Most have reduced their consumption of news about the war, are more careful in selecting information, and refuse to use sources that duplicate information (“I no longer read everything in a row, as I used to, but filter the news.”) Interviewees said that since the war began, the quantity of false news in the media space increased (most notably on Telegram channels), and in response they unsubscribed and unfollowed sources of such content. Interviewees gradually have begun to return to entertainment content, which they say helps to distract them from negative news.

Overall interest in the news remains at a high level compared to the pre-war period.

Interviewees recognize and appreciate quality information and most participants note that all media censor some information. Interviewees view this with understanding as they believe it necessary to avoid helping the enemy and inciting panic among the civilian population.
Dynamics of media consumption
(specificities of special population groups during focus group discussions and in-depth interviews)

- **INTERNALLY DISPLACED PERSONS**
  
  Internally displaced persons have adapted to their new places of residence and follow both the news of their current areas and national news. Interviewees who moved from government-controlled areas closely follow the news about their hometowns, as they plan to return home. They have no difficulties finding such news, as they subscribe to relevant regional Telegram channels or receive information from their friends and acquaintances who stayed there. People who moved from non-government-controlled areas most often do not have access to the news of their cities or villages.

- **INHABITANTS OF OCCUPIED TERRITORIES and/or WHERE THERE ARE HOSTILITIES**
  
  After the full-scale invasion, getting the news has become a mandatory ritual for those living in the occupied territories as information directly affects their safety and quality of life. Most interviewees are interested in their local and regional news as well as news from the frontline.

  Today, there are no problems obtaining information; everyone has access to the information they need. People feel overwhelmed by the news and say that there is no need for additional news sources. Additionally, over the past year and a half, people have adapted to using VPN services, and it has become a normal routine for to use them.

  Interviewees living near the frontline spend less time on national news and are more focused on consuming news related to specific areas of the frontline in order to monitor the contact line’s movement.
Dynamics of media consumption

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

❑ **REFUGEES ABROAD**

Many interviewees report their news consumption has decreased due to a lack of time from starting new jobs, enrolling children in school, and other activities. However, interviewees say staying up to date with news about Ukraine is important for staying in the “Ukrainian context” and maintaining one's national identity. Limiting consumption most often takes the form of reducing the number of sources to two or three. At the same time, using personal contacts as sources of news (receiving information from friends and acquaintances who remain in Ukraine) has become more important.

❑ **SERVICE MEMBERS**

Before mobilization, interviewees’ news consumption was diverse, but after mobilization, it sharply decreased due to the lack of free time. Military personnel devote limited time to news consumption - no more than one hour (maximum two) per day - and use a limited number of sources (usually one main source plus one additional source).

Military personnel on the front line say that after several days without communication, the getting the news is like a breath of fresh air. When there is no access to the news for several days, they feel anxiety. (“When we return from the front line, we immediately turn on our phones and read the news.”)
United News telethon. 2023

Among the 80% of interviewees who know about the United News telethon, 45% of them are weekly viewers and 10% watch it several times a month.

**Awareness of the United News telethon**

- 80% Aware
- 20% Unaware

**Viewing frequency of the United News telethon**

- 55% Every day
- 28% 2-4 times a week
- 13% Once a week
- 10% Several times a month
- 4% 1 time a month
- 1% Once a month or less

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

Base:
Total sample, N=1,534
Those aware of the telethon, N=1,223
Telethon viewers indicate that they have a high level of trust in the news it provides. They praise the telethon’s timeliness, information reliability, and the quality of its analysis of events.

**Trust in the United News telethon**

- Fully trust: 71%
- Somewhat trust: 15%
- Do not trust at all: 6%
- Hard to say: 9%

**Assessment of the quality of news on the United News telethon**

- Information is timely: 74%
- Provided analysis of events: 72%
- Information is reliable: 66%
- Information is accurate: 63%
- Information is complete: 59%

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

**Base:**
Telethon viewers (those who watch it now and those who used to watch it in the past) N=872
United News telethon. 2023

65% of telethon viewers say it is necessary to continue broadcasting the telethon.

**Question:**
What is your attitude to further broadcast of the United News telethon?

**Base:**
Telethon viewers (those who watch it now and those who used to watch it in the past) N=872
United News telethon
(by focus group results)

The national telethon is a source of information for middle-aged and older interviewees, while younger interviewees either do not know about it or do not watch the telethon at all. Viewers have a positive attitude towards the telethon and trust it for the following reasons: it is an official source of information, live broadcasts are made on scene, information is presented concisely, a variety of experts are invited to participate, it is available 24/7, hosts and TV channels are regularly changed, the news is unified and there is no influence of channel owners on the coverage of events, the telethon raises Ukrainians’ spirits and unites society.

At the same time, interest in the telethon is declining because, according to interviewees, it lacks efficiency (compared to Telegram channels), information is censored, embellished, or presented in an overly patriotic way, content is repeated throughout the day, and there is a lack of more positive news not related to the war (such as about history, culture, education, and art).

As for the need to continue the telethon, interviewees were divided. Those who want the telethon to keep broadcasting at least until the end of the war say that for many people (especially older people) it is the only continuous source of information. They also appreciate that journalists united for the sake of one goal within the telethon, while before the war, TV channels were hostile to each other. Those who want channels to return to their own broadcasting grids believe that the telethon has already done its job and discontinuation of the telethon is necessary to ensure diversity of opinion and competition.
United News telethon

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

- **INHABITANTS OF OCCUPIED TERRITORIES and/or WHERE THERE ARE HOSTILITIES**

  Few people had time to watch the telethon before losing access to Ukrainian television, and currently interviewees only watch videos of individual stories on YouTube. Residents of the occupied territories say the telethon's disadvantages include repeating content and information that is either inaccurate or inconsistent with the real situation.

- **REFUGEES ABROAD**

  Some interviewees say they watched the telethon while in Ukraine, but do not watch it while abroad. Only a few interviewees say they watch the live broadcast on YouTube or videos with experts. In general, the telethon is not relevant for refugees abroad, as a television itself and Ukrainian channels are often unavailable.

- **SERVICE MEMBERS**

  The military do not watch the telethon due to the lack of television at the front and lack of time. Those interviewees who watched the telethon before mobilization or during home leave are critical of it, saying the telethon lacks accurate information, criticism of the government, content from the front line, interviews with soldiers and stories about Ukrainian heroes, and information about the future of Ukraine after the war (reforms, political life).
In 2023, Telegram remains the main social network for communication and news consumption and shows considerable growth in both categories. Facebook is just the opposite - going down in terms of audience coverage and news consumption. Viber shows increased audience coverage, but news consumption statistics remains unchanged. TikTok has increased consumption both in terms of communication and news.

**Questions:**
What social media do you use for communication at least once a month?
What social media do you prefer for getting news?

**Base:**
Internet users, 2022 N=1,319, 2023 N=1,435
Consumers of news from social media, 2022 N=1,079, 2023 N=1,163

x / x – significantly more/ less at 95% as compared to the previous wave
Bloggers whose content is read / watched on social networks. 2023

<table>
<thead>
<tr>
<th>Bloggers</th>
<th>2022 %</th>
<th>2023 %</th>
<th>Difference</th>
<th>Significantly more/less at 95% as compared to the previous wave</th>
</tr>
</thead>
<tbody>
<tr>
<td>Serhiy Sternenko</td>
<td>4%</td>
<td>7%</td>
<td>3%</td>
<td>++</td>
</tr>
<tr>
<td>Serhiy Prutyla</td>
<td>16%</td>
<td>6%</td>
<td>-10%</td>
<td>-</td>
</tr>
<tr>
<td>Volodymyr Zelensky</td>
<td>4%</td>
<td>5%</td>
<td>1%</td>
<td>++</td>
</tr>
<tr>
<td>Ihor Lachenkov (Lachen)</td>
<td>2%</td>
<td>5%</td>
<td>3%</td>
<td>++</td>
</tr>
<tr>
<td>Oleksiy Arestovych</td>
<td>10%</td>
<td>4%</td>
<td>-6%</td>
<td>-</td>
</tr>
<tr>
<td>Oleh Zhdanov</td>
<td>4%</td>
<td>4%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Roman Svitan</td>
<td>-</td>
<td>3%</td>
<td>3%</td>
<td>++</td>
</tr>
<tr>
<td>Dmytro Hordon</td>
<td>10%</td>
<td>3%</td>
<td>-7%</td>
<td>-</td>
</tr>
<tr>
<td>Vitaliy Portnykov</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
<td>++</td>
</tr>
<tr>
<td>Valeriy Zaluzhny</td>
<td>0,4%</td>
<td>2%</td>
<td>1,6%</td>
<td>++</td>
</tr>
<tr>
<td>Yuriy Shvets</td>
<td>1%</td>
<td>2%</td>
<td>1%</td>
<td>++</td>
</tr>
<tr>
<td>Yanina Sokolova</td>
<td>2%</td>
<td>1%</td>
<td>-1%</td>
<td>-</td>
</tr>
<tr>
<td>Volodymyr Zolkin</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Mark Feygin</td>
<td>2%</td>
<td>1%</td>
<td>-1%</td>
<td>-</td>
</tr>
<tr>
<td>Yuriy Butusov</td>
<td>4%</td>
<td>1%</td>
<td>-3%</td>
<td>-</td>
</tr>
<tr>
<td>Oleksiy Honcharenko</td>
<td>3%</td>
<td>1%</td>
<td>-2%</td>
<td>-</td>
</tr>
</tbody>
</table>

**Question:**
Which of the bloggers – public and political figures, activists, opinion leaders do you read/watch in social media more often, whom are you subscribed to?

**Base:**
Consumers of news from social media
2022 N=1,059, 2023 N=1,149

x / x – significantly more/ less at 95% as compared to the previous wave
### National social network channels for news consumption. 2023

**Telegram**

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

<table>
<thead>
<tr>
<th>Channel</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trukha Ukrayina</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>Ukrayina Online</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>Lachen pyshe</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>TSN news</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Ukraine NOW</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Novyny Ukrayina</td>
<td>-</td>
<td>4%</td>
</tr>
<tr>
<td>Suspilne Novyny</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Realnyi Kyiv</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Insider UA</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>Realna Viyna</td>
<td>Ukraine</td>
<td>2%</td>
</tr>
<tr>
<td>Ukrayina 24/7</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Nikolayevskyi Vaniok</td>
<td>-</td>
<td>3%</td>
</tr>
</tbody>
</table>

2022 N=506, 2023 N=548

**Facebook**

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

<table>
<thead>
<tr>
<th>Page</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>TSN</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Ukrayinska Pravda</td>
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<td>4%</td>
</tr>
<tr>
<td>Suspilne Novyny</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Novyny Ukrayina</td>
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<td>2%</td>
</tr>
<tr>
<td>Ukrayina 24/7</td>
<td>-</td>
<td>2%</td>
</tr>
<tr>
<td>24th channel</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>STB</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>ICTV channel</td>
<td>3%</td>
<td>2%</td>
</tr>
</tbody>
</table>

2022 N=198, 2023 N=131
National social network channels for news consumption. 2023

### YouTube

Indicate up to three national **YouTube** channels which you most often use to read/watch the news?

(among consumer of news from social networks who prefer YouTube)

<table>
<thead>
<tr>
<th>Channel</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sternenko</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>24th channel</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>TSN</td>
<td>15%</td>
<td>5%</td>
</tr>
<tr>
<td>Ukrainska pravda</td>
<td>0.4%</td>
<td>5%</td>
</tr>
<tr>
<td>TV channel Priamy</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Radio NV</td>
<td>1%</td>
<td>4%</td>
</tr>
<tr>
<td>BIHUS Info</td>
<td>-</td>
<td>4%</td>
</tr>
<tr>
<td>Yuriy Shvets - official channel</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Feygin LIVE</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Oleh Zhdanov</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Alexey Arestovych</td>
<td>5%</td>
<td>2%</td>
</tr>
</tbody>
</table>

2022 N=142, 2023 N=127

### Viber

Indicate up to three national **Viber** channels which you most often use to read/watch the news?

(among consumer of news from social networks who prefer Viber)

<table>
<thead>
<tr>
<th>Channel</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blyskavka</td>
<td>41%</td>
<td>21%</td>
</tr>
<tr>
<td>Krayina_info</td>
<td>12%</td>
<td>4%</td>
</tr>
<tr>
<td>Novyny Ukrayiny</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Volodymyr Zelenskyi</td>
<td>-</td>
<td>2%</td>
</tr>
<tr>
<td>Main Intelligence Office of the Ministry of Defense of Ukraine</td>
<td>-</td>
<td>2%</td>
</tr>
<tr>
<td>UNIAN</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Ukrayina online</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>TSN news</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Valeriy Zaluzhnyi</td>
<td>-</td>
<td>1%</td>
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</tbody>
</table>

2022 N=104, 2023 N=91

**Base:**
Consumers of national news channels in social media, who prefer the respective media for getting news

**Question:**
Name up to three national Telegram pages/channels where you read/watch news most often?
(similar question for Facebook/YouTube/Viber)

---

<table>
<thead>
<tr>
<th>Channel</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sternenko</td>
<td>3%</td>
<td>7%</td>
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<tr>
<td>24th channel</td>
<td>8%</td>
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<tr>
<td>TSN</td>
<td>15%</td>
<td>5%</td>
</tr>
<tr>
<td>Ukrainska pravda</td>
<td>0.4%</td>
<td>5%</td>
</tr>
<tr>
<td>TV channel Priamy</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>Radio NV</td>
<td>1%</td>
<td>4%</td>
</tr>
<tr>
<td>BIHUS Info</td>
<td>-</td>
<td>4%</td>
</tr>
<tr>
<td>Yuriy Shvets - official channel</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Feygin LIVE</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Oleh Zhdanov</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Alexey Arestovych</td>
<td>5%</td>
<td>2%</td>
</tr>
</tbody>
</table>

2022 N=142, 2023 N=127
Using group chats on social networks. 2023

About 40% of social network users consume news shared by their friends and family in group chats. At the same time, only one in three personally shares news content with their friends and family in group chats.

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

- 61% Yes, I read/watch news in group chats
- 42% No, I scroll past the news I find in group chats
- 10% No, my friends and family do not share news in group chats
- 9% Hard to say

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

- 34% Yes, often – I actively share news with my friends and family
- 23% Yes, occasionally – I share only very important/urgent news
- 65% No, I don’t share news in group chats
- 11% Hard to say

**Questions:**
Do you read/watch news shared by friends and family in group chats on social networks (chats of relatives, friends, neighbors, colleagues, fellow students)?
Do you personally post news in group chats, repost news channels/pages in such chats?

**Base:**
Those who use social media for communication, N=1,474
Group chat participants, N=864
Dynamics of group chat use in social networks. 2022-2023

Participation in group chats
Read/watch news in group chats
Share/post news in group chats

<table>
<thead>
<tr>
<th>Group chats</th>
<th>Participation in group chats</th>
<th>Read/watch news in group chats</th>
<th>Share/post news in group chats</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>N= 1278</td>
<td>N= 1278</td>
<td>N= 770</td>
</tr>
<tr>
<td>2022</td>
<td>60%</td>
<td>49%</td>
<td>37%</td>
</tr>
<tr>
<td>2023</td>
<td>61%</td>
<td>42%</td>
<td>34%</td>
</tr>
<tr>
<td></td>
<td>N= 1414</td>
<td>N= 1414</td>
<td>N= 864</td>
</tr>
</tbody>
</table>

Question:
Do you read/watch news shared by friends and family in group chats on social networks (chats of relatives, friends, neighbors, colleagues, fellow students)?
Do you personally post news in group chats, repost news channels/pages in such chats?

Base:
Participation and consumption – social media users for communication,
Posting – group chat participants

x / x – significantly more/less at 95% as compared to the previous wave
Threats in using social networks. 2023

A large majority of Ukrainians - 85% - are aware that using social networks can be dangerous, but only one third of interviewees know how to use specific settings to protect themselves.

**Questions:**
- Do you know about the threats in using social media and/or resources for message exchange?
- Do you know about the ways of protection against the threats available in using social media?
- Do you personally use such settings, ways to protect against the threats available in using social media?

**Base:**
- Users of social media for communication, N=1,414
- Aware of the threats, N=1,203
- Aware of specific protection means, N=400
News consumption on social networks
(by focus group results)

Telegram is interviewees’ main social network for getting the news. They choose it because of access to timely news, its ease of use, a large selection of channels, and the speed of information. It does not take up a phone’s memory (like Viber) and fulfills two functions at once: communicating with loved ones and receiving information.

Facebook is used more often by middle-aged and older interviewees for communicating with others. News consumption takes the form of viewing a feed with reposts from friends and relatives, so it is difficult for the audience to differentiate between specific sources they follow. Younger interviewees do not use Facebook because of the application’s inconvenient interface.

YouTube serves as a substitute for TV news, a source of information from bloggers/experts/opinion leaders, and a place to watch entertainment content (movies, programs, music videos). It is popular due to the wide range of information, the representation of many points of view, and the impartiality and uncensored nature of the sources. Interviewees watch videos of experts speaking about the war and interviews with military, politicians, and volunteers.

Viber is rarely used for news and is becoming less and less popular for communication because it takes up phone memory, is slow to load, and works poorly. Also, the messenger is often called dangerous.

Instagram and Tik Tok are used more by younger and middle-aged interviewees for entertainment content. News consumption on Instagram takes the form of following influencers and friends, most of whom repost high-profile news and military gatherings.

Tik Tok is becoming more popular for news consumption. Interviewees are attracted by the fact that news clips are presented in an easy and understandable form; videos are short, but the content is concentrated.
News consumption on social networks

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

- **INHABITANTS OF OCCUPIED TERRITORIES and/or WHERE THERE ARE HOSTILITIES**
  
  Because Facebook and Instagram are blocked in the occupied territories and do not work properly even with a VPN, interviewees use these social networks exclusively to see posts from their close circles.

  Viber also does not work in some areas. There is widespread information that Viber is being tapped, so its use is minimized.

- **REFUGEES ABROAD**

  Most interviewees participate in groups or chats for refugees ("Ukrainians in Poland/Canada/etc.") on Telegram and Facebook.

- **SERVICE MEMBERS**

  Signal proved to be the most popular messenger among the military for exchanging messages. It is considered to be a "Ukrainian development," and is the most secure app of its type. It is recommended for use during mobilization to communicate with the leadership or fellow soldiers on military issues. Units create groups to discuss current news and events.

  In addition, the military often use Facebook to watch videos of real battles taken with video cameras on their comrades' helmets.
USAID-Internews Media Consumption Survey

Trust in Information Sources
Trust in information sources. 2022-2023

Interviewees’ most reliable sources of are family and friends, although their trust in friends and family decreased compared to 2022. Among state authorities, the most trusted are the General Staff the Armed Forces of Ukraine and the Ministry of Defense. The Office of the President is also highly trusted but at slightly lower level than last year.

<table>
<thead>
<tr>
<th>Source</th>
<th>2022 % of those who trust, 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family</td>
<td>86%</td>
</tr>
<tr>
<td>General Staff of AFU/Ministry of Defense</td>
<td>79%</td>
</tr>
<tr>
<td>Friends</td>
<td>81%</td>
</tr>
<tr>
<td>Office of the President</td>
<td>73%</td>
</tr>
<tr>
<td>Colleagues / Fellow students</td>
<td>63%</td>
</tr>
<tr>
<td>Official government websites</td>
<td>60%</td>
</tr>
<tr>
<td>Social networks</td>
<td>57%</td>
</tr>
<tr>
<td>Local authorities</td>
<td>61%</td>
</tr>
<tr>
<td>Media (TV, radio, newspapers, online news)</td>
<td>57%</td>
</tr>
<tr>
<td>Church</td>
<td>40%</td>
</tr>
</tbody>
</table>

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

Base:
Total sample, 2022 N=1,450
2023 N=1,534

Trust in sources, 2023

<table>
<thead>
<tr>
<th>Source</th>
<th>Fully trust</th>
<th>Somewhat trust</th>
<th>Hard to say</th>
<th>Somewhat distrust</th>
<th>Do not trust at all</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family</td>
<td>47%</td>
<td>26%</td>
<td>12%</td>
<td>10%</td>
<td>8%</td>
</tr>
<tr>
<td>General Staff of AFU/Ministry of Defense</td>
<td>40%</td>
<td>26%</td>
<td>12%</td>
<td>10%</td>
<td>8%</td>
</tr>
<tr>
<td>Friends</td>
<td>49%</td>
<td>26%</td>
<td>12%</td>
<td>10%</td>
<td>8%</td>
</tr>
<tr>
<td>Office of the President</td>
<td>45%</td>
<td>24%</td>
<td>13%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Colleagues / Fellow students</td>
<td>44%</td>
<td>15%</td>
<td>20%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Official government websites</td>
<td>43%</td>
<td>16%</td>
<td>17%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Social networks</td>
<td>47%</td>
<td>8%</td>
<td>16%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Local authorities</td>
<td>42%</td>
<td>12%</td>
<td>13%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Media (TV, radio, newspapers, online news)</td>
<td>46%</td>
<td>7%</td>
<td>22%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Church</td>
<td>23%</td>
<td>13%</td>
<td>25%</td>
<td>23%</td>
<td>16%</td>
</tr>
</tbody>
</table>
Dynamics of trust in news in the media. 2015-2023

In 2023, the level of trust in both national and regional radio increased and trust in print media returned to 2021 levels. The main reasons for increased trust in radio are the disappearance of pro-Russian stations, absence of Russian music, and increased presence of news content on music stations.

Social networks  News sites  Television  Radio  Print media

National

Regional

Questions:

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

Base:
Total sample, 2015-2021  N=1,600/wave
2022  N=1,450
2023  N=1,534

x / x – significantly more/ less at 95% as compared to the previous wave
Level of trust in news in the media

(by focus group results)

In general, interviewees trust the media. Most interviewees trust those sources of information that have stood the test of time. Over the past year and a half, interviewees have “purged” which news channels they follow, subscribe to, or watch, and only consume those that broadcast truthful and accurate news. Telegram channels and websites have the highest level of trust. Interviewees deem sources especially trustworthy when they allow comments and live discussions – these are seen as signs of openness to criticism.

The most reliable source of information for interviewees today is witnesses to the events. The majority of interviewees verify information they receive from the media and official sources by personally communicating with those who were potentially on the scene:
- Ordinary Ukrainians ask their relatives and friends who live in these cities or villages for news about the shelling or arrival;
- Displaced persons clarify information they hear in the news about their hometown or village with relatives, friends, and neighbors who stayed there;
- Military personnel check the news of advancement/retreat with their colleagues who are on the frontlines.

(specificities of some categories of residents by the results of focus groups and in-depth interviews)

- **INHABITANTS OF OCCUPIED TERRITORIES and/or WHERE THERE ARE HOSTILITIES**
  Interviewees’ trust in the media has dropped significantly since the full-scale invasion. After a year and a half of living under occupation, interviewees notice a discrepancy between what is presented in the news and the realities they see in their cities. The decrease in trust is also influenced by exaggerated optimism in the news - when situations are presented much more “beautiful” and victory is said to be imminent.
Assessment of News Covering the War in Ukraine
Assessment of news covering the war in Ukraine. 2023

Most interviewees - 74% - say they get enough or even too much content about the war. Despite the ongoing war, interviewees report they have not become tired of war-related news. In 2023, the share of those who are not tired of news about the war reached 58%.

**Questions:**

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

**Base:**

Total sample, N=1,534
Assessment of news covering the war in Ukraine. 2023

Most interviewees trust content covering the course of the war and believe that media provides timely, reliable information and high-quality analyses of events.

**Confidence in content covering the war**

- 66% Fully trust
- 57% Somewhat trust
- 18% Hard to say
- 6% Do not trust at all
- 9% Somewhat distrust

**Assessment of the quality of content covering the war**

- Information is timely: 66%
- Provided analysis of events: 64%
- Information is reliable: 58%
- Information is accurate: 52%
- Information is complete: 51%

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

**Base:**
Total sample, N=1,543
Dynamics of assessment of news covering the war in Ukraine. 2022-2023

**Sufficiency of content**
- 2022: 57%
- 2023: 58%

**Growing tired of it**
- 2022: 48%
- 2023: 42%

**Level of trust**
- 2022: 66%
- 2023: 65%

**Timeliness**
- 2022: 63%
- 2023: 66%

**Analysis of events**
- 2022: 64%
- 2023: 64%

**Reliability**
- 2022: 56%
- 2023: 58%

**Accuracy**
- 2022: 49%
- 2023: 52%

**Completeness**
- 2022: 46%
- 2023: 51%

**Questions:**
- Do you consider that there are enough publications/materials in media dedicated to the coverage of the course of the war in Ukraine?
- Do you feel fatigued from publications/materials highlighting the course of the war in Ukraine?
- To what extent do you trust publications/materials in media that cover the course of the war?
- Assess whether these publications/materials correspond to the following features - % of those who agree in full or in part

**Base:**
- Total sample, 2022: N=1,450
- 2023: N=1,534

x / x - significantly more/ less than 95% as compared to the previous wave
Assessment of news covering the war in Ukraine

(by focus group results)

Interviewees trust the information about war developments and understand restrictions imposed on information about events at the front ("Of course, it would be interesting to know, but it could harm the military.") Interviewees say such content is adequately complete, but some say certain information is not available to the general public due to secrecy, such as casualties and the number of weapons. Interviewees positively assess the timeliness of information, as the sources quickly cover events and live broadcast. Interviewees are generally satisfied with the accuracy and reliability of war-related information but agree there is a certain amount of secrecy to avoid aiding the enemy or inciting panic among the civilian population. They also feel positively about the analysis of war-related content, as a wide range of experts and opinion leaders are involved in discussions.

There is no fatigue from the news about the war, but rather an acclimatization to it - a calmer reaction to tragic events. Interviewees consume war-related content in limited doses from a limited number of sources.

Interviewees say they lack positive news related to Ukrainians’ civilian life (culture, art, education) which is needed for the media space to be balanced and like what it was before the war. There is also a demand for information about real losses of Ukrainian troops, the supply of modern weapons, the number of captured weapons and Russian prisoners, volunteer work, and exposing corruption in the government.

(specificities of some categories of residents by the results of focus groups and in-depth interviews)

The media space lacks content about IDPs’ needs and difficulties, the approximate timing of the end of the war needed to plan a return to hometowns, life in the occupied territories, plans to rebuild destroyed cities and villages, and Ukrainian university admissions.

Service members say they would like more media coverage about the real enemy intelligence, the lives of the military at the front, the fate of captured soldiers of the ‘Azov’ regiment, and motivation for mobilization - so that civilians are prepared for field conditions at the front, military rotation, and ways to evacuate the wounded.
Media Literacy
Attributes of truthful information. 2015-2023

According to interviewees, one of the most frequent signs of truthful news is the reliability of the information source of – 37% of interviewees pay attention to this. However, 42% of interviewees trust their favorite media “by default” or intuitively assess the truthfulness of news.

### How do you determine whether you can trust information in the media? 2015-2023

<table>
<thead>
<tr>
<th>Year</th>
<th>I pay attention to the source / origin of the news item</th>
<th>I pay attention to whether different points of view are presented</th>
<th>I pay attention to who owns the channel / newspaper / radio</th>
<th>I trust my favorite media, which I know and am used to</th>
<th>I don’t use clear cut signs, I do it intuitively</th>
<th>I don’t know how to distinguish trustworthy information</th>
<th>Hard to say</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023</td>
<td>37%</td>
<td>26%</td>
<td>14%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2022</td>
<td>39%</td>
<td>26%</td>
<td>15%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2021</td>
<td>34%</td>
<td>31%</td>
<td>16%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2020</td>
<td>35%</td>
<td>32%</td>
<td>13%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td>27%</td>
<td>26%</td>
<td>13%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>28%</td>
<td>29%</td>
<td>14%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>23%</td>
<td>26%</td>
<td>12%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td>25%</td>
<td>28%</td>
<td>11%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>24%</td>
<td>28%</td>
<td>13%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Base:
Total sample, 2015-2021 N=1,600/wave 2022 N=1,450 2023 N=1,534

x / x – significantly more/less at 95% as compared to the previous wave
Awareness, ability to distinguish

81% of the interviewees know about the existence of hidden advertising. Of those who know about it, two thirds report being able to distinguish between hidden advertising and real news.

### Awareness of hidden advertising

- **Aware:** 81%
- **Not aware:** 15%
- **Hard to say:** 4%

### Ability to distinguish (self-rated)

- **Can:** 67%
- **Cannot:** 33%

Of those who are aware

Questions:

Do you know that sometimes the media publish paid / sponsored content, covert advertising presented as ordinary one?

In your opinion, can you distinguish such content from ordinary ones?

Base:

- **Awareness, all sample:** N=1534
- **Ability to distinguish, only those aware:** N=1,237
Disinformation. 2023

Awareness, ability to distinguish

84% of interviewees know about the existence of disinformation, and most think that they can identify it. However, 57% of the audience do not see disinformation as an urgent problem.

---

Questions:

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

Base:

Awareness, total sample, N=1,534
Ability to decipher and relevance, only those aware, N=1,292
Hidden advertising and disinformation. 2015-2023

Interviewees’ level of awareness about hidden advertising remained stable. However, the share of interviewees who believe they can distinguish hidden advertising has decreased considerably.

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

**Base:**
- Awareness – total sample, 2015-2022 N=1,450-1,600/wave 2023 N=1,534
- Ability to distinguish, relevance – only those aware

**Table:**

<table>
<thead>
<tr>
<th>Year</th>
<th>Awareness</th>
<th>Ability to distinguish</th>
<th>Relevance or Urgency</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>(self-rated)</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>49%</td>
<td>57%</td>
<td>75%</td>
</tr>
<tr>
<td>2016</td>
<td>55%</td>
<td>47%</td>
<td>37%</td>
</tr>
<tr>
<td>2017</td>
<td>55%</td>
<td>63%</td>
<td>35%</td>
</tr>
<tr>
<td>2018</td>
<td>65%</td>
<td>56%</td>
<td>83%</td>
</tr>
<tr>
<td>2019</td>
<td>74%</td>
<td>68%</td>
<td>84%</td>
</tr>
<tr>
<td>2020</td>
<td>77%</td>
<td>61%</td>
<td>83%</td>
</tr>
<tr>
<td>2021</td>
<td>78%</td>
<td>72%</td>
<td>84%</td>
</tr>
<tr>
<td>2022</td>
<td>81%</td>
<td>67%</td>
<td>84%</td>
</tr>
<tr>
<td>2023</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- x/y – significantly more/less at 95% as compared to the previous wave.
Hidden advertising and disinformation
(by focus group results)

Interviewees often come across hidden advertising and disinformation. Their attitude toward such content is negative because it distorts the perception of the current situation.

Interviewees said they can distinguish disinformation by the following criteria:

- Absurd or illogical news
- Scandalous headlines and emotionally charged text
- Absence of facts, specific details, photo or video evidence collected at the scene
- Presence of only one source, lack of official source confirmation

Most interviewees report not having difficulties recognizing false news, but they say authors of such content disguise it better and better all the time.

Important: Focus group participants rely on their own understanding and intuition in consuming the news. They select news and information sources based on personal considerations and not objective criteria.
Among those who were aware of the existence of disinformation, 78% of interviewees were able to correctly identify at least one news item, but only 8% correctly identified all news items. Interviewees made the fewest mistakes when assessing the news about the seizure of children from Ukrainian refugees - 70% correct answers. The news about the attitude to the Moscow Patriarchate Church was correctly assessed by about half of the survey participants, the fewest correct answers were observed when assessing the news about the number of registered individual entrepreneurs.

### Ability to distinguish (actual assessment)

<table>
<thead>
<tr>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>11%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>24%</td>
<td>14%</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>68%</td>
<td>63%</td>
<td>78%</td>
<td>72%</td>
<td>78%</td>
</tr>
</tbody>
</table>

- All three pieces rated correctly
- At least one piece rated correctly
- None of the pieces rated correctly
- IDK/Hard to say to all three pieces

### News assessed by interviewees in 2023

In EU countries, juvenile prevention agencies are massively removing children from Ukrainian refugee women. The reasons being that a mother loudly scolds a child, demands they do their homework, or goes to the store (this is prohibited abroad). Children are also taken away from mothers who cannot collect and register all necessary documents for the child in time. In addition, EU countries stop paying benefits, and there are no places for Ukrainian children in schools. This was reported by a well-known blogger, former host of 112 and NewsOne TV channels, and now a YouTube channel host.

66% of Ukrainians believe that the Ukrainian Orthodox Church of the Moscow Patriarchate should be banned in Ukraine, and 85% believe that the government should intervene in its activities. These are the results of a poll conducted by the Kyiv International Institute of Sociology from May 26-June 5. These figures are growing, because in December 2022, the results showed 54% of those who were in favor of the ban and 78% who wanted the state to intervene in the activities of the UOC-MP to some extent.

As of the beginning of April this year, the number of registered individual entrepreneurs in Ukraine was almost 2 million, and the number of companies was over 12 million. Businesses that ceased operations were fully compensated by newly opened businesses. And the number of newly registered companies is 5.6 times higher than the number of businesses that have ceased operations. This is reported by the open data platform Opendatabot, citing data from the Unified State Register (USR).

### Question:

Next, please read excerpts of some news stories. Read them and indicate which one(s) is (are) false and which are true.

<table>
<thead>
<tr>
<th>TRUE</th>
<th>FALSE</th>
<th>IDK/Hard to say</th>
</tr>
</thead>
<tbody>
<tr>
<td>56%</td>
<td>70%</td>
<td>3%</td>
</tr>
</tbody>
</table>

**Correctly rated 56%**

**Correctly rated 70%**

**Hard to say**
Causes of errors in recognizing disinformation

(by focus group results)

The news about children being taken away from Ukrainian refugees was most identified as false, as its source was not trustworthy (a former host of 112 and NewsOne TV channels). Interviewees also relied on their own experiences communicating with many acquaintances abroad (“No one else’s children have been taken away from them”) and view the word “massively” as absurd.

The news about the Ukrainian Orthodox Church of the Moscow Patriarchate in Ukraine was perceived by some interviewees as true because the source can be trusted (the website of the Public Broadcaster, KIIS), the information is true, and the numbers are credible (“Ukrainians have long wanted to separate from the Russian Church”, “The figures are not approximate, I believe them.”) Others believed the news story to be false saying that sociological surveys should not be trusted, especially in wartime, and the numbers are not trustworthy because they are very large (“Maybe they interviewed 200 people in total,” “I do not believe any surveys are conducted in wartime.”)

Some interviewees perceived the news about the number of registered entrepreneurs to be true, because the source (Unified State Register) is trustworthy and the news itself is common sense (“It is really easy and convenient to open a sole proprietorship now.”) Others believed this news to be false, as the large numbers cause distrust (“5.6 times is a lot. It’s unrealistic during the war, because many people have closed their businesses and gone abroad,” “It’s impossible to open so many sole proprietorships during the war”) and they distrust the source “Opendatabot“ (“I don't trust bots at all.”) Interviewees also relied on their own experience communicating with many acquaintances who have closed their businesses (“I know many people who have closed their businesses and did not reopen them.”)
Awareness of media owners. 2023

One in three interviewees considers it necessary to know who owns the media. The share of interviewees who actually know the owners of at least some national TV channels is decreasing, now 27%.

Question: To what extent is it important for you to know who owns the media?
- Hard to say
- Not important
- Not very important
- Somewhat important
- Very important

Awareness of the owners of national TV channels
- Hard to say
- No
- Yes, of some channels
- Yes

Awareness of the owners of regional media
- Hard to say
- No
- Yes, of some media
- Yes

Base: Total sample, N=1534
Awareness of media owners in detail. 2023

Though some interviewees know the owners of the mainstream media – they mention Kolomoisky, Akhmetov, Pinchuk – they say the owners’ influence on editorial policy is decreasing due to the war or a complete rejection of their media business.

**TV channels in detail**

**1+1**
- Kolomoisky: 16%
- Incorrectly identified: 3%
- Hard to say: 81%

**TRK Ukraina**
- Akhmetov: 10%
- Incorrectly identified: 2%
- Hard to say: 88%

**ICTV**
- Pinchuk: 95%

**Inter**
- Firtash: 90%

**STB**
- Pinchuk: 95%

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

**Base:**
Total sample, N=1534
Awareness of media owners. 2015-2023

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

**Base:**
Total sample, 2015-2021 N=1,600/wave
2022 N=1,450
2023 N=1,534

- **Importance of awareness of who owns the media**
  - 2015: 39%
  - 2016: 38%
  - 2017: 36%
  - 2018: 36%
  - 2019: 36%
  - 2020: 30%
  - 2021: 28%
  - 2022: 34%
  - 2023: 36%

- **Owners of national television channels**
  - 2015: 46%
  - 2016: 40%
  - 2017: 50%
  - 2018: 34%
  - 2019: 27%

- **Owners of regional media**
  - 2015: 6%
  - 2016: 9%
  - 2017: 9%
  - 2018: 6%
  - 2019: 9%

x / x – significantly more/less at 95% as compared to the previous wave
Debunking False Narratives
In interviewees’ opinions, the most credible narratives are that Western sanctions do not work, that Western weapons and assistance are not used for their intended purposes (they are embezzled), and that the authorities are corrupt and want the war to go on for personal gain. The least credible narrative is that Ukraine cannot beat Russia because it is a very large and powerful country.

Since the beginning of 2023, have you come across the following statements?

- **Western sanctions do not work**
  - True: 56%
  - False: 44%

- **The West is using Ukraine for manpower and will fight until the last Ukrainian is standing**
  - True: 53%
  - False: 47%

- **Western weapons and assistance are not used for their intended purpose (they are embezzled)**
  - True: 49%
  - False: 51%

- **Corrupt Ukrainian authorities want the war to go on for personal gain**
  - True: 47%
  - False: 53%

- **Ukraine cannot defeat Russia because it is a very large and powerful country**
  - True: 38%
  - False: 62%

- **Western weapons and assistance are not used for their intended purpose (they are embezzled)**
  - True: 38%
  - False: 62%

- **Ukrainian authorities provoked a divide in the Christian church and Ukrainians do not support this**
  - True: 26%
  - False: 74%

In your opinion, these are:

- **True**
- **False**
- **Hard to say**

Did you share this statement?

- **Yes**
- **No**
- **Hard to say**

In what ways did you share and discuss it?

- **Discussed in a personal conversation**
- **Reposted on social networks**
- **Discussed online**

Why did you decide to share it?

- **To find out what others think**
- **It’s just a topic starter**
- **It’s true and people need to know about it**
- **It’s disinformation and I wanted to warn others**
- **It’s funny**
- **To have some fun sharing obvious disinformation**

Question:
Since the beginning of 2023, have you come across any of these statements? Which of them, in your opinion, were true or false?

Did you share or discuss these statements with others? In what ways did you share these statements / discuss the news? Why did you decide to share these statements or discuss them?
Sociodemographic profiles of those who believe false narratives to be true. 2023

There are no considerable demographic differences between who do and do not believe disinformation. Women and men are distributed almost equally – except for the narrative saying it is impossible to defeat Russia. Older interviewees tended to believe the narrative about the impossibility of victory and authorities provoking the division of the Christian church.

In your opinion, the following statements are:

<table>
<thead>
<tr>
<th>Statement</th>
<th>Total Sample</th>
<th>Those Who Think False Narratives Are True</th>
</tr>
</thead>
<tbody>
<tr>
<td>Western sanctions do not work</td>
<td>True 40%</td>
<td>N=859</td>
</tr>
<tr>
<td>The West is using Ukraine for manpower and will fight until the last Ukrainian is standing</td>
<td>True 32%</td>
<td>N=817</td>
</tr>
<tr>
<td>Western weapons and assistance are not used for their intended purpose (they are embezzled)</td>
<td>True 40%</td>
<td>N=753</td>
</tr>
<tr>
<td>Corrupt Ukrainian authorities want the war to go on for personal gain</td>
<td>True 39%</td>
<td>N=722</td>
</tr>
<tr>
<td>Ukraine cannot defeat Russia because it is a very large and powerful country</td>
<td>True 12%</td>
<td>N=579</td>
</tr>
<tr>
<td>Ukrainian authorities provoked a divide in the Christian church and Ukrainians do not support this</td>
<td>True 28%</td>
<td>N=395</td>
</tr>
</tbody>
</table>

**Gender**
- 47% Men
- 53% Women

**Age**
- 18-25: 15%
- 26-35: 22%
- 36-45: 26%
- 46-54: 17%
- 55-65: 21%

**Education**
- Secondary/vocational, 45%
- Complete and incomplete higher education, 55%

Question:
Which of these statements do you think were true or false?
Perception of false narratives
(by focus group results)

Interviewees knew most of the narratives - they had seen them in the media and identified them as Russian propaganda.

“Western sanctions do not work.” The majority of interviewees believe this narrative to be partially true, because despite sanctions, Russia manages to get necessary goods through third countries (“They get everything for their weapons through Kazakhstan and Georgia,” “Russia gets computer chips through other countries.”)

“The West is using Ukraine as manpower and will fight until the last Ukrainian is standing.” The vast majority believe this narrative to be false because the West is interested in ending the war as soon as possible, and because foreigners are fighting on Ukraine’s side (“Western countries allow their citizens to fight for Ukraine, so it is not true.”) Those who believe this narrative to be true explain that Western countries provide weapons, but Ukrainians are fighting and dying in the war (“They help us with weapons, but they themselves do not fight,” “Ukraine has been turned into a battlefield, and the United States supplies weapons.”)

“Western weapons and assistance are not used for their intended purpose (they are embezzled).” Interviewees were divided. One group believes the statement to be false as there is effective control by Western partners and relevant Ukrainian authorities (“How can a tank be sold? It’s unreal!” “I heard that the US conducted monitoring, but found no violations,” “HIMARS is a very large weapon, it is difficult to sell it without being noticed.”) Another group believes this to be true, because there have been cases when Western humanitarian aid was resold (“Indeed, many military officers say that the weapons we receive are often old, and the new ones are probably resold,” “Reznikov himself said that no one forbids us to sell surplus weapons.”)
Perception of false narratives
(by focus group results)

“Corrupt Ukrainian authorities want the war to go on for personal gain.” Interviewees see both possibilities. Some believe the narrative to be false because the war brings a lot of suffering to the Ukrainian people (“There is no point in prolonging the war because missiles are flying all over Ukraine.”) Others believe the narrative to be true because the government in Ukraine is actually corrupt (“There are indeed people in power who are very corrupt,” “Yes, it is true, because they are already thinking about the elections.”)

“Ukraine cannot defeat Russia because it is a very large and powerful country.” The majority identify this narrative as false - the whole world is helping Ukraine, so it is quite possible to defeat Russia (“They said they would take Kyiv in 3 days, but they didn’t,” “We just need more time to win,” “We have a very high level of patriotism.”)

“The Ukrainian government provoked a divide in the Christian church and Ukrainians do not support this.” The majority of interviewees believe this narrative to be false. Young interviewees ages 18-24 had not even heard of such narrative and considered it incomprehensible. The audience supported the ban on the Ukrainian Orthodox Church of the Moscow Patriarchate in Ukraine (“It should have been done long ago, because there is no church there, it is a source of Russian propaganda and weapons.”)
Fact-Checking
(verifying accuracy and correctness of media content)
Compared to last year, interviewees' awareness of services used to verify content is higher, as is the share of interviewees who report using such services. However, 65% of those aware of specific resources do not have any real experience of using them.

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

**Base:**
Total sample, 2022 N=1,456, 2023 N=1,534
Those aware of the services and their names, 2022 N=203, 2023 N=229
Fact-checking (by focus group results)

Some interviewees have heard of fact-checking services and tools. While their attitude toward such tools is positive, they rarely take advantage of them.

Most often, interviewees verify information on their own, either through other sources or by talking to those who witnessed the event ("I call my friends who were somewhere near the event and ask if it is true.")
Russian Media
Personal consumption of Russian media keeps decreasing – only 8% of interviewees used Russian media in 2023. The share of those who use Russian media within interviewees’ personal networks also decreased significantly to 16%. The main reason for using Russian media was to find out what they are saying about Ukraine.

**Reasons for using Russian media**

- **Personal use of Russian media**
  - 2023: 44%
  - 2022: 16%
  - 2021: 14%
  - 2020: 10%
  - 2019: 8%

- **Use of Russian media by personal network**
  - 2023: 16%
  - 2022: 25%

**Question:**
In the past 30 days, have you used any Russian media to receive news, including those that describe themselves as liberal and/or in opposition to the official Russian government?

**Base:**
Total sample, 2015-2021 N=1,600/wave
- 2022 N=1,450
- 2023 N=1,534

- **Use of Russian media by personal network**
  - To find out what the Russian media are saying about Ukraine
  - To get an alternative/different point of view
  - To get news from Russia – about what's happening in Russia
  - They are interesting, interesting to watch/read
  - Opportunity to get news in Russian
  - They are truthful, more independent
  - Other
  - Hard to say

**Base:**
Total sample, 2015-2021 N=1,600/wave
- 2022 N=1,450
- 2023 N=1,534

x / x – significantly more/less at 95% as compared to the previous wave
Use of Russian media. 2019-2023

**Personal use**

- 2019: 13%
- 2020: 17%
- 2021: 15%
- 2022: 12%
- 2023: 8%

**Use by people in personal network**

- 2019: 30%
- 2020: 28%
- 2021: 35%
- 2022: 25%
- 2023: 16%

**Question:**

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

**Base:**

Total sample, 2019-2021 N=1,600/wave
- 2022 N=1,450
- 2023 N=1,534

x / x – significantly more/less at 95% as compared to the previous wave.
Use of and trust in Russian media

Some Ukrainians still use Russian social networks (5%) and news sites (3%), but trust in Russian media is low.

**Consumption of Russian media within the month**

- **Social networks**: 5% (2023) vs 7% (2022)
- **News sites**: 3% (2023) vs 4% (2022)
- **Television**: 1% (2023) vs 1% (2022)
- **Radio**: 0.4% (2023) vs 0.2% (2022)

**Level of trust in Russian media among their consumers**

- **Social networks**: 19% (2023) vs 7% (2022)
- **News sites**: 4% (2023) vs 3% (2022)
- **Television**: 15% (2023) vs 3% (2022)

*Radio
Insufficient base*

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

To what extent do you trust the news in...

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

**Base:**
Use, total sample, 2022 N=1,450
2023 N=1,450
Trust: those who use this type of media
2023 N=76, 42, 13

X / X – significantly more/less at 95% as compared to the previous wave

66
Peculiarities of Russian media consumption
(by focus group results)

Interest and trust in Russian media is low. Most interviewees do not show interest in “opposition” media either, considering them to be pseudo-opposition ("There is no opposition there at all.") Some interviewees who did use such sources mentioned the news sites “Nastoyashcheye Vriemia” and “Meduza” as well as Russian bloggers: Mark Feygin, Mikhail Khodorkovsky, Alexander Nevzorov, Yulia Latynina, Viktor Shenderovich, Ruslan Leviev, Valery Solovey, Gennady Gudkov, and Yevgeny Chichvarkin.

(specificities of some population categories by the results of focus groups and in-depth interviews)

❑ INHABITANTS OF OCCUPIED TERRITORIES and/or WHERE THERE ARE HOSTILITIES
While last year there was a fundamental refusal to consume Russian media, the situation has changed. Interviewees say they have no trust in Russian television and other sources from the occupation authorities, but they are increasingly paying attention to such news. Their reasons include: fatigue from living under occupation/near hostilities, difficult living conditions, and lack of moral strength to search for reliable Ukrainian information and navigating blocked access. Additionally, it is through Russian sources that the population might be able to receive current, useful information about daily life and solving everyday issues.

❑ SERVICE MEMBERS
Some military personnel on the frontline use Telegram channels of Russian military commanders and bloggers to get information from the Russian perspective, as well as enter Russian chats under fake names and start conversations to obtain operational information.
Complaints about Media Content
Complaints about media content

About 40% of interviewees encountered offensive media content and 30% of those interviewees reported such content. Those who did not complain are unaware of how this can be done and do not expect an effective response. In 2023, the percentage of those who believe complaining would not be effective decreased.
Complaints about media content. 2021-2023

Encountered such content

<table>
<thead>
<tr>
<th>Year</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>1583</td>
<td>1456</td>
<td>1534</td>
</tr>
</tbody>
</table>

Complained about the content

<table>
<thead>
<tr>
<th>Year</th>
<th>2021</th>
<th>2022</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>641</td>
<td>626</td>
<td>601</td>
</tr>
</tbody>
</table>

Offensive content in media

- 2021: 40%
- 2022: 43%
- 2023: 39%

- 2021: 16%
- 2022: 27%
- 2023: 30%

Question:
Have you ever come across content in the media that you think were so inaccurate or offensive that you wanted to complain about them? Have you complained about such content?
Complaints about media content
(by focus group results)

The majority of interviewees have encountered offensive content on the Internet, but only a few have used the “complain” button on social networks ("I complained about a group on Instagram that sends men abroad", "I complained about videos of violence and suffering of Ukrainians").

Interviewees do not report or complain about offensive content because they say complaints are ineffective and inefficient ("You cut off one head, but another grows") and they are not aware that special organizations which deal with complaints about media exist.
Willingness to Pay for Access to Online Media
Willingness to pay for access to online media

One in four news site users is willing to pay for access to their preferred online media. Half of them – provided the cost of the service is no more than two cups of coffee (60 UAH or $1.60). Those unwilling to pay for access say that all news stories, even exclusive ones, are available quickly from free news media.

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

Base:
Users of news websites, 2021 N=753, 2022 N=613 2023 N=622
USAID-Internews Media Consumption Survey

Media Coverage of Equality-Related Topics
Almost 60% of interviewees have encountered stereotypes about men and women in media, more than half of them say media uses stereotype quite often. However, 54% of interviewees say that men and women in leadership and authority positions are represented fairly in the media.
Demand for coverage of topics related to equality. 2023

One in three interviewees wants to see more coverage of the problems women face in wartime (in terms of protecting themselves and their families) and one in four interviewees wants more information about displaced women and their struggles, and about women leaders, political figures, diplomats, and volunteers. As a whole, men are considerably less interested than women are in such topics.

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

<table>
<thead>
<tr>
<th>Topic</th>
<th>Total sample</th>
<th>Men</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased risks faced by women during war, protecting themselves and their families</td>
<td>26%</td>
<td>24%</td>
<td>34%</td>
</tr>
<tr>
<td>Challenges faced by refugee women and ways to overcome them</td>
<td>27%</td>
<td>25%</td>
<td>29%</td>
</tr>
<tr>
<td>Women in conflict: service in the army, politics/diplomacy/volunteering, etc.</td>
<td>25%</td>
<td>26%</td>
<td>27%</td>
</tr>
<tr>
<td>War-related violence against women</td>
<td>22%</td>
<td>21%</td>
<td>24%</td>
</tr>
<tr>
<td>I am not interested in any of these topics</td>
<td>48%</td>
<td>42%</td>
<td>48%</td>
</tr>
</tbody>
</table>

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

**Base:** Total sample, 2022 N=1,456, 2023 N=1,534, men, 2022 N=680, 2023 N=721, women, 2022 N=776, 2023 N=814

x / x – significantly more/ less at 95% as compared to the previous wave
More than 40% of interviewees say that the LGBTQ+ community is represented respectfully in the media. At the same time, one in three interviewees was not able to say either way.

**Question:**
Assess how respectful is the representation of the LGBT+ community in the media?

**Base:**
Total sample, N=1534
Media coverage of equality-related topics
(by focus group results)

The majority of interviewees reported significant changes in the media space regarding gender equality. They most frequently mentioned the President's addresses where he speaks about “male and female military defenders” and emphasizes women in certain professions - director, police officer, psychologist, member of parliament.

Interviewees note a gradual leveling of the situation regarding the equal representation of women and men (“Now the focus is on talent, not gender.”) They mentioned women in the army, police, supermarket security, and the appearance of a women’s compartment.

At the same time, there has been a decrease in media attention to the issue of domestic violence, as the war has overwhelmed many topics.

Interviewees talked about an increase in media coverage of the LGBTQ+ community and believe that they are covered in a tolerant manner (“The media have started to cover this topic,” "They are very tolerant and respectful of LGBTQ+ people.”)
Annex 1
Research Methodology
### QUALITATIVE STAGE. Focus Group Discussions

<table>
<thead>
<tr>
<th></th>
<th>Baseline and interpretative</th>
<th>With rural residents</th>
<th>With internally displaced persons</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Target audience</strong></td>
<td>Men/Women 18-65</td>
<td>Men/Women 30-60</td>
<td>Men/Women 20-60</td>
</tr>
<tr>
<td><strong>Geography</strong></td>
<td>Ukraine, cities and towns</td>
<td>Ukraine, urban villages</td>
<td>Ukraine, cities</td>
</tr>
<tr>
<td></td>
<td>Kyiv (2 FGDs)</td>
<td>Dnipropetrovsk region, urban village of Mezhova (1 FGD), Odesa region, urban village of Ovidiopol (1 FGD)</td>
<td>Kyiv (1 FGD)</td>
</tr>
<tr>
<td></td>
<td>Lviv (2 FGDs)</td>
<td></td>
<td>Dnipro (1 FGD)</td>
</tr>
<tr>
<td></td>
<td>Odesa (2 FGDs)</td>
<td></td>
<td>Ivano-Frankivsk (1 FGD)</td>
</tr>
<tr>
<td></td>
<td>Dnipro (2 FGDs)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Kharkiv (1 FGD)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Lubny (1 FGD)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Research design details

### QUALITATIVE STAGE. In-Depth Interviews

<table>
<thead>
<tr>
<th>With service members</th>
<th>With internally displaced persons temporarily living abroad (refugees)</th>
<th>With the inhabitants of temporarily occupied territories, blocked territories and/or territories where there are hostilities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Target audience</strong></td>
<td><strong>Target audience</strong></td>
<td><strong>Target audience</strong></td>
</tr>
<tr>
<td>Men/Women 20-60</td>
<td>Men/Women 20-60</td>
<td>Men/Women 20-60</td>
</tr>
<tr>
<td><strong>Dates of field work</strong></td>
<td>14.08.2023–28.08.2023</td>
<td><strong>Dates of field work</strong> 14.08.2023–12.09.2023</td>
</tr>
<tr>
<td><strong>Geography</strong></td>
<td><strong>Geography</strong></td>
<td><strong>Geography</strong></td>
</tr>
</tbody>
</table>
| persons located in the areas of hostilities and in other field positions in Donetsk region, Kyiv region, Chernihiv region, the town of Yavoriv. | Poland (6 interviews)  
Germany (6 interviews)  
Czechia (6 interviews)  
the UK (6 interviews)  
the Baltic States (6 interviews)  
Canada (6 interviews) | Kharkiv region (3 interviews)  
- Bohodukhiv, Derhachi, Lozova  
Luhansk region (3 interviews)  
- Bilovodsk, Novopskov, Luhansk  
Donetsk region (3 interviews)  
- Donetsk, Mariupol  
Zaporizhzhia region (3 interviews)  
- Melitopol, Tokmak  
Kherson region (3 interviews)  
- Oleshky, Skadovsk, Chaplynka |
Face-to-face method:

Target audience
Men/Women 18-65

Dates of field work
28.07.2023 – 28.08.2023

Geography
Ukraine, cities of 50 thousand +,
The survey was conducted in the city of Kyiv, Vinnytsia, Volyn, Dnipropetrovsk, Zhytomyr, Zakarpattia, Ivano-Frankivsk, Kyiv, Kirovohrad, Lviv, Mykolayiv, Odesa, Poltava, Rivne, Sumy, Ternopil, Kharkiv, Khmelnytskyi, Cherkasy, Chernihiv, Chernivtsi regions (in Mykolayiv and Kharkiv regions – only in the city of Mykolayiv and the city of Kharkiv).

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

Total sample 2023 = 3,250 interviews,
of which ~ 350 interviews in 8 regions:
Kyiv (including the city of Kyiv), Vinnytsia, Dnipropetrovsk, Lviv, Poltava, Sumy, Kharkiv regions.

Representative part 2023 = 1,534 interviews.

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

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total sample</strong></td>
<td>1643</td>
<td>1638</td>
<td>1650</td>
<td>1643</td>
<td>1582</td>
<td>1583</td>
<td>1456</td>
<td>1583</td>
<td>1456</td>
<td>100%</td>
</tr>
<tr>
<td><strong>West</strong></td>
<td>276</td>
<td>275</td>
<td>277</td>
<td>276</td>
<td>256</td>
<td>267</td>
<td>267</td>
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<td>142</td>
<td>147</td>
<td>154</td>
<td>10%</td>
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Annex 2

Sociodemographic Profile
Sociodemographic profile. 2023

**Gender**
- Men: 53%
- Women: 47%

**Age**
- 18-35: 44%
- 36-55: 37%
- 56-65: 19%

**Level of income**
- Low: 18%
- Below average: 25%
- Average: 43%
- Average+: 8%
- High: 3%
- Hard to say/Refusal: 2%

**Type of settlement**
- Kyiv: 34%
- 500,000+: 33%
- 100,000 - 499,999: 20%
- 50,000 - 99,999: 13%

Base:
Total sample, N=1,534
Sociodemographic profile. 2023

**Education**
- Complete higher: 47%
- Incomplete higher (3 years or less): 8%
- Vocational secondary: 30%
- Vocational after complete secondary: 4%
- Complete secondary (10-11 grades): 9%
- Vocational after incomplete secondary: 1%
- Incomplete secondary (less than 10 grades): 1%

**Family status**
- Married/Cohabiting: 52%
- Divorced: 12%
- Single: 27%
- Widowed: 7%
- Declined to answer: 5%

**Children**
- No children below 18: 33%
- Children aged 0-6: 21%
- Children aged 7-18: 53%

**Employment**
- Specialist: 27%
- Worker, agricultural worker: 15%
- Retired: 12%
- Official: 9%
- Homemaker, on maternity leave: 9%
- Self-employed: 7%
- Looking for a job: 6%
- Student: 6%
- Entrepreneur, business owner, farmer: 5%
- Service person / law enforcement officer: 3%

**Household size**
- 1 person: 20%
- 2 persons: 26%
- 3 persons: 28%
- 4 persons: 18%
- 5 persons: 7%
- 6 persons: 1%
- 7 and more: 1%

*Base: Total sample, N=1,534*
Regions

Sociodemographic profile. 2023

Base:
Total sample, N=1,534

* only the city of Mykolayiv
** only the city of Kharkiv
Annex 3

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

Base:
Each region, N=350
Level of trust in the news provided by national media. 2023

Split by macroregions

**National indicator**

- **Social networks**: 59%
- **News sites**: 56%
- **Television**: 49%

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

**West**: N=314
- National social network channels: 56%
- National news sites: 56%
- National television: 46%

**Center**: N=181
- National social network channels: 56%
- National news sites: 61%
- National television: 59%

**North**: N=490
- National social network channels: 57%
- National news sites: 56%
- National television: 61%

**South**: N=375
- National social network channels: 47%
- National news sites: 46%
- National television: 55%

**EAST**: N=181
- National social network channels: 60%
- National news sites: 57%
- National television: 50%
Level of trust in the news provided by national media. 2023

National indicator

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<tr>
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<th>National news sites</th>
<th>National television</th>
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<td>56%</td>
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<tr>
<td>News sites</td>
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<td>49%</td>
</tr>
<tr>
<td>Television</td>
<td>49%</td>
<td>49%</td>
</tr>
</tbody>
</table>

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

Base:
Each region, N=350
Level of trust in the news provided by regional media. 2023

Split by macroregions

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

<table>
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<tr>
<th>National indicator</th>
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<td>53%</td>
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<tr>
<td>Television</td>
<td>50%</td>
<td>41%</td>
<td>43%</td>
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**Base:**
West N= 314
Center N= 181
East N= 375
North N= 490
Level of trust in the news provided by regional media. 2023

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

Base: Each region, N~350
Use of Russian media by regions. 2023

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

**Base:**
Each region, N=350

- **National indicator**
  - **Personal use:** 8%
  - **Use by those in personal network:** 16%

- **Kyiv:** 11% (Personal), 21% (Personal network)
- **Lviv:** 11% (Personal), 16% (Personal network)
- **Vinnytsia:** 8% (Personal), 20% (Personal network)
- **Odesa:** 7% (Personal), 17% (Personal network)
- **Dnipro:** 6% (Personal), 7% (Personal network)
- **Sumy:** 6% (Personal), 7% (Personal network)
- **Poltava:** 5% (Personal), 10% (Personal network)
- **Kharkiv:** 6% (Personal), 11% (Personal network)
- **Dnipro:** 7% (Personal), 17% (Personal network)
This survey was made possible by the support of the American people through the United States Agency for International Development (USAID).

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