

MEDIA LITERACY INDEX OF UKRAINIANS

ANALYTIC REPORT BASED ON THE FINDINGS OF A COMPLEX RESEARCH

The report based on the data of the quantitative research conducted by the research agency "Info Sapiens" was compiled at the request of NGO "Media Detector" by Marta Naumova, Candidate of Sociological Sciences, Associate Professor, Senior Research Fellow at the Institute of Sociology of the National Academy of Sciences of Ukraine

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1. THE METHODOLOGY OF THE STUDY AND MAIN CONCLUSIONS

RESEARCH METHODOLOGY

The research objective is to validate the concept of the media literacy index, as well as to establish the latter's value for different segments of the Ukrainian audience.

Methodology: quantitative research; face-to-face interviews with the use of a tablet based on a standard questionnaire (CAPI)

Geographical scope: national research

Sample scope: 2000 respondents

Target audience: adult population of Ukraine(18+)

Sample type: breakdown by age, gender, population area scope and region

Sample design:

REGION	NUMBER OF RESPONDENTS										Total:
	Men					Women					
	18-25	26-35	36-45	46-55	56-65	18-25	26-35	36-45	46-55	56-65	
Kyiv	8	20	15	13	10	9	21	27	17	15	155
Northern Ukraine	15	32	32	28	24	18	30	30	27	30	267
Western Ukraine	39	65	51	43	47	33	49	47	52	63	488
Central Ukraine	30	55	56	53	46	30	61	53	57	62	503
Southern Ukraine	21	35	40	35	26	20	39	41	36	35	329
Eastern Ukraine	16	37	28	18	22	14	37	29	27	30	258
TOTAL:	130	244	222	191	174	123	237	228	216	235	2000

THE ROLE OF THE MEDIA IN SOCIETY

- Almost two thirds of Ukrainians (63%) think that **the primary purpose of media is to report about socially significant developments**. Media should also **raise awareness, provide useful information and communicate certain values that are important for the society and the state** (39% each). Every third respondent (32%) believes that media should be a platform for dialogue between the state and the society. 28% of respondents believe that media are meant to entertain the audience, whereas 25% consider it to be an institution for criticism and control of the government. 16% of respondents see media as a platform for discussions between regular people.
- Almost equal shares of respondents believe that media either **do not influence them at all** (25%) or, to the contrary, **do so quite significantly**, all the way to changing their values and interests (24%). The biggest share of respondents (36%) admit that media influence their assessment of the sociopolitical situation. Every third respondent (33%) reports a change in his/her emotional state following review of certain content. 31% of respondents believe that by focusing on certain developments media shape specific “agenda”. Media also influence attitudes towards public figures (27%), political choices (24%), as well as those of goods and services (19%).

BELIEFS ABOUT THE WORK OF THE MEDIA INDUSTRY AND PERCEPTIONS OF THE UKRAINIAN MEDIA LANDSCAPE

- The audience believes that **the main criteria for the selection of developments to be reported by media** include:
 - ✓ **Relevance (39%);**
 - ✓ **Media owners' interest in their coverage (33%);**
 - ✓ **Social significance (32%);**
 - ✓ Sensationalism (29%);
 - ✓ Involvement of celebrities (politicians, stars, etc.) (29%).

CONCLUSIONS

- Two out of three Ukrainians (67%) believe that **media serve the interests of their owners**, not those of the state (8%) or society (8%).
- The audience is well aware (88%) of the fact that most Ukrainian media are privately owned. 4% of respondents are convinced that media are controlled by the state, whereas 2% believe that they are controlled by the people of Ukraine.
- Only a third of respondents (34%) said it was important/predominantly important for them to know who owned a media. 59% of respondents are not interested in this kind of information.
- Most often Ukrainians know who are the owners of the following TV channels: **Channel 5 (63%), 1+1 (58%), “Ukraine” (45%)** and **“Rada” (44%)**. No more than a quarter of the audience knows who controls such TV channels as **Inter (18%), 112 (24%), Priamyi (23%), STB (18%), NEWSONE (23%), ICTV (18%)** and **ZIK (19%)**. Only 21% of Ukrainians know that **UA:Pershyi** is a public broadcaster.

MEDIA LANDSCAPE REGULATION AWARENESS AND ATTITUDES TOWARDS PUBLIC BROADCASTING

- Less than a third of Ukrainians (28%) know that **media are regulated by the state**. Most respondents believe that media content is primarily influenced by their owners (71%). Every fourth (25%) respondent assumes that messages are influenced by market competition, whereas 9% believe that media are regulated by journalists themselves.
- Every second (52%) respondent believes that there is **no official state censorship** of media in Ukraine. However, 38% of them are convinced that such censorship exists in practice. 16% believe that neither is the case. A third of respondents (33%) think that there is official state censorship of media in the country. 19% of them believe that media are censored both officially and in practice, whereas the remaining 14% believe that censorship is only official, but content is not censored in practice. 14% are not sure whether censorship exists in Ukraine or not.
- Two thirds of the Ukrainian audience (68%) emphasize the **importance of public service media**, given that they work in the interests of the whole society rather than those of an owner (32%), cover topics that are of no interest to commercial media, including social, cultural and scientific issues (19%), and are not interested in manipulation (17%). A quarter (24%) of respondents have **no interest in the development of public broadcasting**, because they do not believe that media can be independent (19%), as well as because in their opinion public service media are less professional and have worse quality than commercial media (5%).

- Only a third of respondents (35%) **know that there are public service media** in Ukraine. 31% are convinced that they do not exist in the country, whereas 35% found it hard to tell.
- Those who are aware of the existence of public broadcasting in Ukraine (34% of respondents) most often mentioned **UA:Pershyi** (73%) and **UA:Culture** (41%) as examples of public broadcasters.

MEDIA CONSUMPTION: SOURCES AND FREQUENCY OF RECEIPT OF INFORMATION ON SOCIOPOLITICAL TOPICS

- **National entertainment TV channels** (STB, 1+1, Inter, Ukraine, etc.) are the **leading sources of information on sociopolitical topics**, with 57% of the Ukrainian audience watching them to that end. Every second (50%) respondent uses social networks, whereas 37% and 31% of respondents mentioned communication with friends and family, respectively. 28% of respondents watch national news TV channels, whereas 24% refer to web resources. 19% of the Ukrainian audience learn their sociopolitical news from messengers. Public national or regional channels are used by the mere 12% of respondents.
- Most often (38% of respondents) Ukrainians spend from **30 to 60 minutes** consuming news on a given day. 27% do that less than 30 minutes while 21% need between an hour and two. Finally, it takes another 11% 2 hours or more.
- Ukrainians treat most media with suspicion, trusting them only in part (67% to 74%). Messengers (24%), radio (23%) and print media (11%) are trusted the most. The least trusted type of media is television (10% of respondents trust it while 18% don't).

THE USE OF INTERNET AND DIGITAL COMPETENCE

- Only 15% of Ukrainians do not use the Internet, while 71% are active users that surf the net every day or almost every day; 11% do so 2 to 5 times a week while 3% - once a week or less often.

- A **smartphone** is by far the most popular device for connecting to the Internet: 81% of respondents typically use one. The second most popular devices are a laptop and a desktop computer (7% each). 3% said they typically used a tablet, while another 2% reported using smart TV technology.
- Key motives for using the Internet include search for information (74%), consumption of news (61%), communication on social networks and messengers (60%), as well as watching video content (56%). Only 16% are proactive Internet users who either create and post their own content (publications, photos, videos, audio files) (15%) or keep their own pages/channels/websites for professional, commercial or reputational purposes (7%).

MEDIA LITERACY: TRUST IN MEDIA AND sensitivity TO DISTORTED CONTEXT

DISINFORMATION

- The problem of disinformation is relevant for 57% of the Ukrainian audience, while 28% consider it irrelevant and 6% have never heard about fake news. Another 9% found it hard to tell.
- The biggest share of the audience (32%) relies on intuition when assessing the accuracy of news. 28% look for a link to the source of information, while 26% consider it an important marker when a piece contains different points of view or photos/videos confirming the stipulated information. Every fourth (25%) respondent tends to trust a piece of news if it does not contradict his beliefs and comes off as feasible. For 23% of respondents, reliability of a news piece is defined by their trust in a source in which it is published, whereas for 21% - by the author's reputation or popularity (14%). 11% trust almost every news piece until they come across a refutation.
- 42% of Ukrainians never check information for its accuracy, whereas 31% search for additional and more detailed information rather than check it. Only a quarter of Ukrainians (24%) check media content.

MANIPULATION

- The problem of manipulation in the media is relevant for 57% of the Ukrainian audience, while 25% consider it irrelevant and 8% have never heard about manipulative messages. Another 10% found it hard to tell.
- 27% of the audience rely on intuition when assessing whether a message is manipulative. 31% suspect manipulation if a piece covers only one side of a given story, while 26% consider it an important marker if information is incomplete or inaccurate. Almost every fourth (23%) respondent tends not to trust news if they contain insufficient arguments, multiple clichés, instances of labeling and stereotypical judgments. 21% suspect authors of seeking to manipulate the audience's perception if a piece is excessively emotional and lacks references to the source. Other indicators of manipulative materials, such as emotional manipulation, intimidation (17%), inclusion of comments by unknown or biased experts (13%), distortion of figures and opinion polls' findings (12%), mixing facts with judgements (12%), as well as quotes taken out of context (12%), were mentioned less frequently.

PAID-FOR MATERIALS

- The problem of paid-for materials in the media is relevant for 55% of the Ukrainian audience, while 23% consider it irrelevant and 9% have never heard about "hit pieces". Another 13% found it hard to tell.
- 35% of the audience rely on intuition to assess whether a material is paid-for. 38% suspect a material to be a "hit piece" if it covers only positive or negative aspects of a person, a group of people or a product, while 29% consider it an important marker if a piece contributes to the recognizability of a person, organization or product. Respondents also pay attention to the presence of assessments (either positive or negative), as well as that of comments from biased or unknown experts (22% each). The audience suspects a material to be paid-for if identical messages appear in other media (19%), as well as if it covers protocol events that are attended by officials but have no public significance (14%).

MEDIA LITERACY LEVEL

- The media literacy index was evaluated on a scale from 0 to 10, where 1 is the lowest level, 10 is the highest, and 5 is the average. According to the findings of the research, 15% of Ukrainians have a low level of media literacy. That of a third (33%) of Ukrainians is below average, whereas 44% and 8% boast higher than average and high level of media literacy, respectively.
- The level of media literacy depends on gender, age and level of education. The share of men with a high level of media literacy is twice as big as the share of women (11% vs 6%). Quite predictably, the level of media literacy is high among young people aged 18-25 (due to their digital competence) and low among older people aged 56-65.
- The lower the educational status, the lower the level of media literacy. Thus, the share of people with low and below average level of media literacy among respondents with general secondary education is 63%, whereas it only equals 30% among those having complete/incomplete higher education.
- There is a correlation between the type of a population area and the level of its inhabitants' media literacy. Rural residents have the lowest level, while those of cities with a population of over 500 thousand have the highest level of media literacy.
- When it comes to regional differences, residents of northern Ukraine have the highest level of media literacy, whereas those living in its southern part have the lowest one. Shares of people with below-average and low levels of media literacy are 41% and 58%, respectively.
- The most significant differences in the level of media literacy exist between people with different financial statuses. Obviously, the higher a person's standards of living are, the higher his/her media literacy is. 72% of those whose income is only sufficient for food have low and below average levels of media literacy. At the same time, among respondents whose income is sufficient for everything and who manage to save money, this share totals at only 33%.

2. MEDIA LITERACY INDEX OF UKRAINIANS

Conceptual model and
indicators of the Index-2020

Conceptual model behind the media literacy index

- The model of media literacy **index** is based on two components: the concept of the model developed by L. Masterman and the results of qualitative assessment, undertaken by NGO “Detector Media” as part of the “Media consumption among Ukrainians: conceptualization of the audience’s media literacy index” research it conducted.
- The revised model of media literacy is comprised of **four categories** and **42 indicators**:

CATEGORIES	SUBCATEGORIES	EMPIRICAL INDICATORS (SURVEY QUESTIONS)
I. UNDERSTANDING (13 indicators)	<ul style="list-style-type: none"> • Understanding the role the media plays in the society • Understanding the extent of the media's influence on the minds of the public, including the impact at the levels of perception and analysis of information, as well as on behavior patterns 	<ol style="list-style-type: none"> 1. “In your opinion, what are the main purposes of media with respect to society?” 2. “How does the media influence you personally? Please only choose the statement(s) you agree with”.
	<ul style="list-style-type: none"> • Understanding how the media industry works and what Ukrainian media landscape looks like 	<ol style="list-style-type: none"> 3. “How do you think media companies determine which events should be covered in news? Please choose 3 major criteria that media editorial teams use to define what is to be covered” 4. “The interests of what actor(s) do most of Ukrainian media serve?” 5. “Most of media companies in Ukraine belong to...” 6. “How important is it for you to know who is the owner of a media company?” 7. “Do you happen to know who the owner of ... TV-channel is?”
	<ul style="list-style-type: none"> • Awareness of legislation governing the work of the media and attitudes towards public broadcasting 	<ol style="list-style-type: none"> 8. “What are the legislation and state bodies governing the work of the media in Ukraine?” 9. “Can governmental bodies influence what journalists write and say? Is there any censorship in the media in our country?” 10. “Do you happen to know who the owner of ... TV-channel is ?” 11. “Are there any public broadcasting media in Ukraine?” 12. “What national TV-channels are public broadcasters?” 13. “What national radio stations are public broadcasters?”

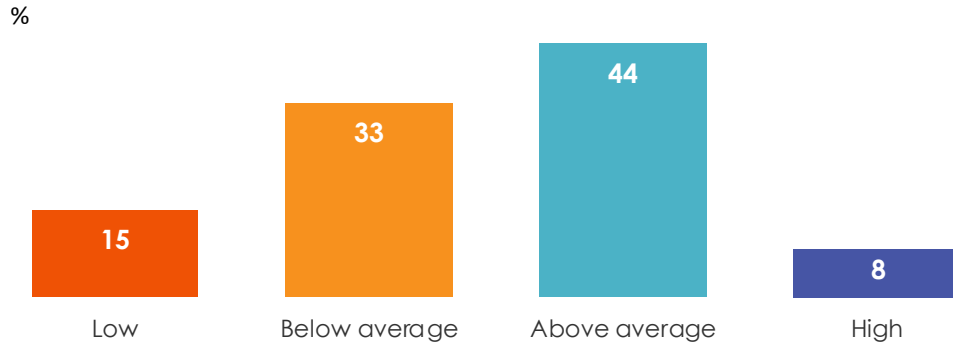
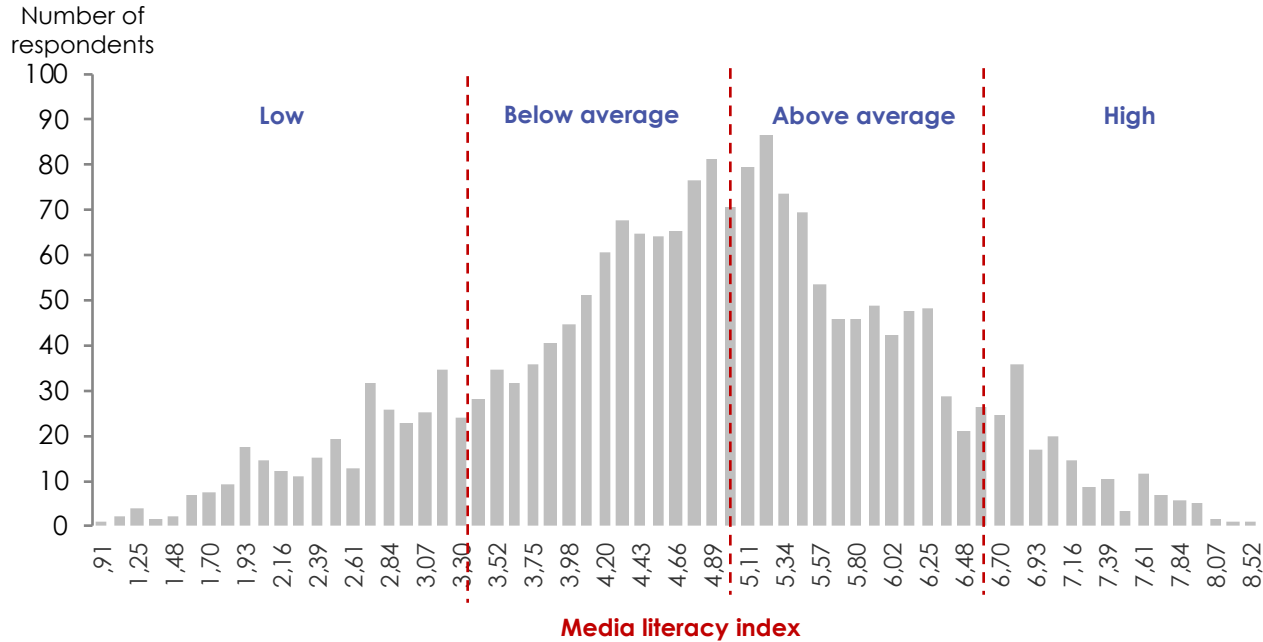
MEDIA LITERACY INDEX

CATEGORIES	SUBCATEGORIES	EMPIRICAL INDICATORS (SURVEY QUESTIONS)
II. CONSUMPTION (4 indicators)	<ul style="list-style-type: none"> Number of sources of information on sociopolitical topics accessed weekly 	14. "What were the sources you used to receive news during the last week?"
	<ul style="list-style-type: none"> Time spent at reading news per day 	15. "How much time a day on average did you spend consuming news from various media?"
	<ul style="list-style-type: none"> Purpose of using the Internet 	16. "What purposes do you usually use the Internet for? Please choose only the answer that describes what you have been using it for during the last month."
	<ul style="list-style-type: none"> Devices used for accessing the Internet 	17. "What device do you typically use to access the Internet?"
III. DIGITAL COMPETENCE (16 indicators)	<ul style="list-style-type: none"> Internet as a source of news on sociopolitical topics 	18. "Where do you usually look up news on sociopolitical topics?" 19. "How often do you use the Internet in general?" 20. "I have accounts on more than 3 social networks"
	<ul style="list-style-type: none"> Understanding the way new media function and the terms they use 	21. "An Internet troll is a type of software imitating human activity on the network" 22. "Bot is a person on the network that aims at stirring up other users by insulting, humiliating or provoking them." 23. "Cookies are viruses that can damage computer performance" 24. "I believe that the use of social media news feed algorithm adjusted to the interests of a particular consumer is a manipulation."
	<ul style="list-style-type: none"> Approach to digital security 	25. "I believe that protection of personal data on the Internet is currently a very relevant issue" 26. "Usually I check the "About" section of a website whenever I visit it for the first time" 27. "I rarely if ever change my passwords on websites and/or social networks" 28. "Normally if a person sends me a friendship request on a social network, I do not check the account of that person" 29. "I use two-step authentication whenever I can" 30. "I have never used VPN network, designed to hide my IP address as well as any of my activity on the Internet". 31. "Sometimes I try various tests on the Internet and social networks for fun (e.g. "Which movie hero am I?", etc.)"
	<ul style="list-style-type: none"> Creating own media content 	32. "I can record, edit and post a video on the Internet without resorting to help from anyone else" 33. "I see my profiles on social networks as a tool for establishing my professional and business reputation"

CATEGORIES	SUBCATEGORIES	EMPIRICAL INDICATORS (SURVEY QUESTIONS)
IV. SENSITIVITY TO FALSIFIED MEDIA CONTENT (9 indicators)	<ul style="list-style-type: none"> Ability to detect disinformation/fake news 	34. "Nowadays you can hear a lot of discussion of fake news and disinformation in the media. How relevant is this issue for you?" 35. "What do you think are the indicators of news being fake?" 36. "Do you ever do any further verification of information that you encounter on the media?" 37. "What are the methods you use to verify information?" 38. "Which of these sources of information do you consider credible? Please mark all of your choices."
	<ul style="list-style-type: none"> Ability to detect manipulative materials 	39. "Some say that media can influence public opinion not only through disinformation, but also by using manipulations or falsified information. How relevant is this issue for you?" 40. "What indicators do you consider to be signs of manipulative coverage/news?"
	<ul style="list-style-type: none"> Ability to determine manipulation techniques 	41. "Some say that media can sometimes even disseminate "paid-for" news, i.e., advertisements disguised as ordinary news. How relevant is this issue for you?" 42. "What do you think are the indicators of these "paid-for" news?"

- The scale of the standard **media literacy index** ranges from 0 to 10, 0 being the very low level of media literacy and 10 being the maximum level.

MEDIA LITERACY INDEX



- The scale of the standard **media literacy index** ranges from 0 to 10, 0 being the very low level of media literacy and 10 being the maximum level.
- Results were converted into a four-point scale for easier understanding.
- According to the findings, **15%** of Ukrainians have low level of media literacy, **33%** - below average level, **44%** have above average level, and **8%** - high level of media literacy.

PROFILES OF AUDIENCE SEGMENTS BASED ON MEDIA LITERACY LEVEL

15%

LOW

- Almost half of the low media literacy segment (**45%**) is comprised of **elderly population**, aged between 56 to 65.
- Have only basic education: **38%** have general secondary education; **52%** - vocational secondary education.
- **40%** reside in rural areas.
- More common for residents of the southern part of the country (**23%**).
- The lowest income level: for **30%** it is only enough to buy food.
- **31%** believe the media does not influence their lives in any way.
- Television is the single source of news on socio-political topics (**84%**).
- **68%** never use **Internet**.
- Only **19%** are concerned about who **the owner of a media company** is.
- **32%** are not aware of the importance of public broadcasting media, and **21%** do not have any opinion in this regard.
- **74%** never verify credibility of information.

33%

BELOW
AVERAGE

- Almost identical shares of population under and over 46 years (**53% vs 47%**)
- More than half of the segment have vocational secondary education (**54%**)
- More common for residents of the southern (**19%**) and eastern(**15%**) parts of the country.
- Average income level.
- **27%** believe the media does not influence their lives in any way.
- **62%** have a single source of news; **30%** have two sources.
- **67%** use the Internet either every day or almost every day.
- **43%** use social networks **as a source of news on sociopolitical topics**, **15%** use news websites; **8%** use messaging applications.
- Only **15%** never use the **Internet**: **67%** use the Internet either every day or almost every day.
- **63%** believe that independent public broadcasting media are an important element of the media system.
- **57%** never verify credibility of information.

PROFILES OF AUDIENCE SEGMENTS BASED ON MEDIA LITERACY LEVEL

44%

ABOVE
AVERAGE

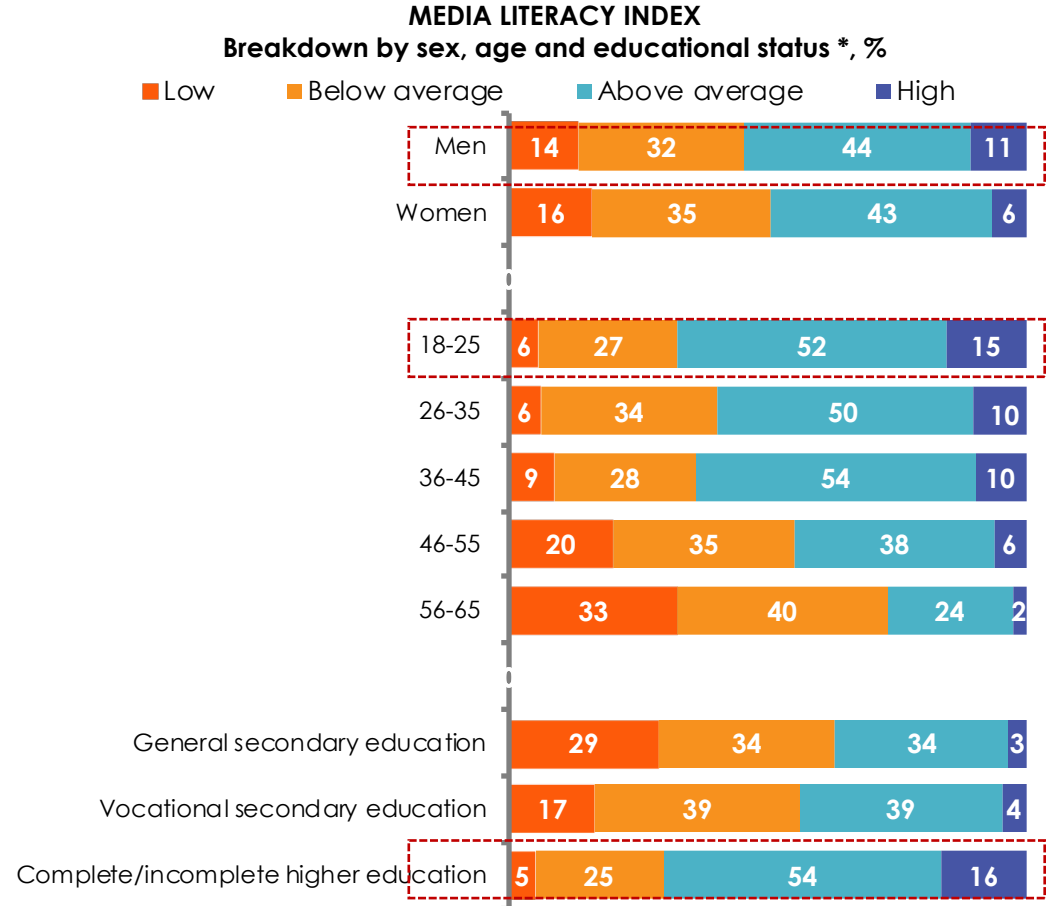
- Mostly **middle-aged population** – more than half of the segment (**55%**) are people aged between 26 to 45.
- **45%** have higher education unlike the groups with low and below average levels of media literacy.
- More common for population in the western (**27%**) and central (**26%**) parts of the country.
- Average and above average income level. **44%** generally have their basic needs covered, **40%** have decent income, but do not accumulate savings.
- One person in four (**24%**) uses more than **3 sources of information**; **37%** mostly use just 2.
- **87%** use the **Internet** every day.
- **63%** use social networks **as a source of news on sociopolitical topics**, **31%** use news websites; **18%** use messaging applications.
- **77%** believe that independent public broadcasting media are an important element of the media system.
- **31%** verify credibility of information they encounter.

8%

HIGH

- The larger part of this segment is **comprised of men (61%)** and people under 45 (**79%**). Young people (18-24) make up almost one fourth of this group (**24%**).
- **This is the segment with the highest level of education**: two thirds have either complete or incomplete higher education (**68%**)
- Mostly residents of big cities (**41%**).
- More than one third of the segment are people residing in the northern part of the country (**37%**).
- The highest level of income as compared with other segments: **50%** have decent income, but cannot afford saving up; **20%** can afford saving up.
- Have an understanding of how **media can influence** the minds of the audience. **40%** believe media affect their values/ interests.
- This is the segment with the most diverse sources of information. More than half (**55%**) have 3 or more sources of news on sociopolitical topics. **95%** use the Internet every day.
- **67%** use social networks **as a source of news on sociopolitical topics**, **57%** use news websites; **36%** use messaging applications.
- **57%** consider it important to know who **the owners and the sources of financing of media companies** are.
- **86%** of the segment recognize the importance of public broadcasting.
- Every one in two (**49%**) members of the segment verifies credibility of information.

- Media literacy level depends on sex, age and educational status.
- The share of men with a high level of media literacy is twice as big as the share of women (11% vs 6%).
- Quite predictably, the level of media literacy is high among young people aged 18-25 (due to their digital competence) and low among older people aged 56-65.
- The lower the educational status, the lower the level of media literacy. Thus, the share of people with low and below average level of media literacy among respondents with general secondary education is 63%, whereas it only equals 30% among those having complete/incomplete higher education.



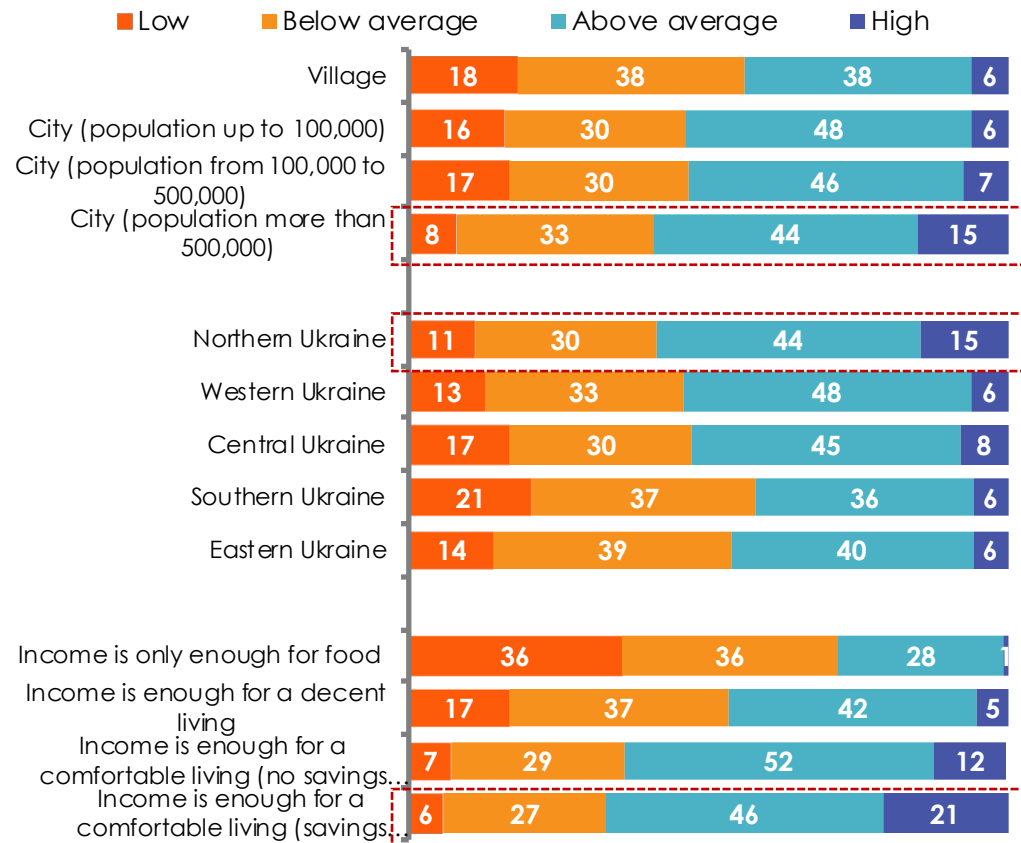
Source of data: all respondents, N= 2000;

* Accuracy of measurement = 0,05.

MEDIA LITERACY INDEX

MEDIA LITERACY INDEX
Breakdown by the type of population area, region and income level*, %

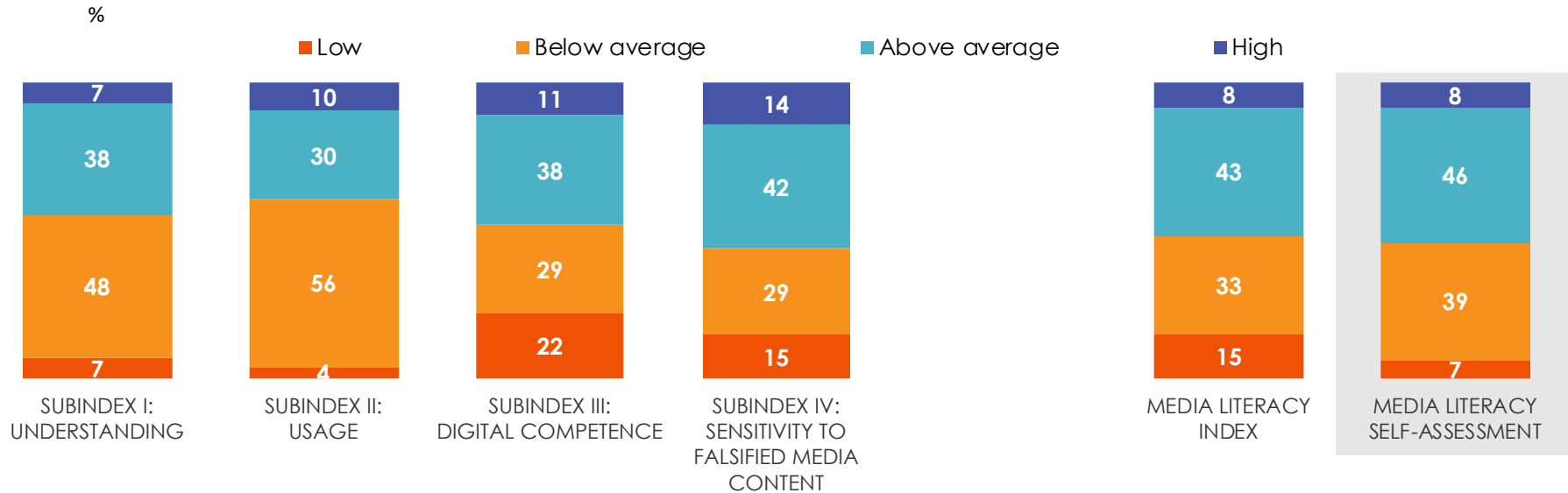
- There is a correlation between the type of a population area and the level of its inhabitants' media literacy. Rural residents have the lowest level, while those of cities with a population of over 500 thousand have the highest level of media literacy.
- When it comes to regional differences, residents of northern Ukraine have the highest level of media literacy, whereas those living in its southern part have the lowest one. Shares of people with below-average and low levels of media literacy are 41% and 58%, respectively.
- The most significant differences in the level of media literacy exist between people with different financial statuses. Obviously, the higher a person's standards of living are, the higher his/her media literacy is. 72% of those whose income is only sufficient for food have low and below average levels of media literacy. At the same time, among respondents whose income is sufficient for everything and who manage to save money, this share totals at only 33%.



Source of data: all respondents, N= 2000;

* Accuracy of measurement = 0,05.

MEDIA LITERACY SUBINDEXES

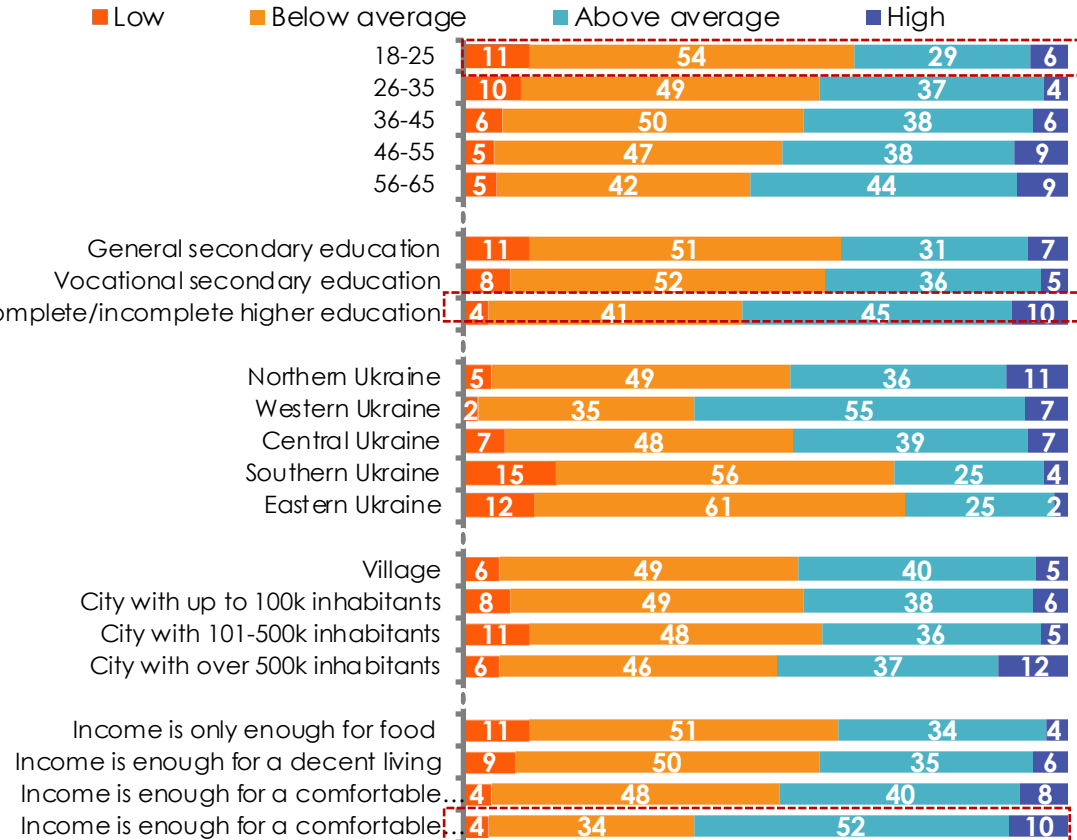


- The best score in the overall media literacy index of the Ukrainian audience was achieved under Subindex IV (**sensitivity to falsified media content**). **56%** of respondents demonstrated above average level.
- The largest share of respondents scoring low on media literacy index was under Subindex III (**Digital competence**) (**22%**). This can be explained by that fact that 15% of Ukrainians never use the Internet and **3%** consume media through the Internet once a week or even less often.
- **The score of media literacy self-assessment is slightly higher than the survey results.**

SUBINDEX I: UNDERSTANDING

Sociodemographic breakdown of the findings*, %

- The level of societal awareness of the role of media and its influence varies depending on age, education, income as well as location and type of population area.
- Interestingly, young population is less knowledgeable of these matters than older age groups.
- Population groups with the high level of education (**55%**) and income (**62%**) predictably have **high and above average level of awareness of the role of media**.
- Respondents residing in the southern and eastern parts of the country showed slightly lower scores under this subindex when compared to population in the northern, western and central areas.



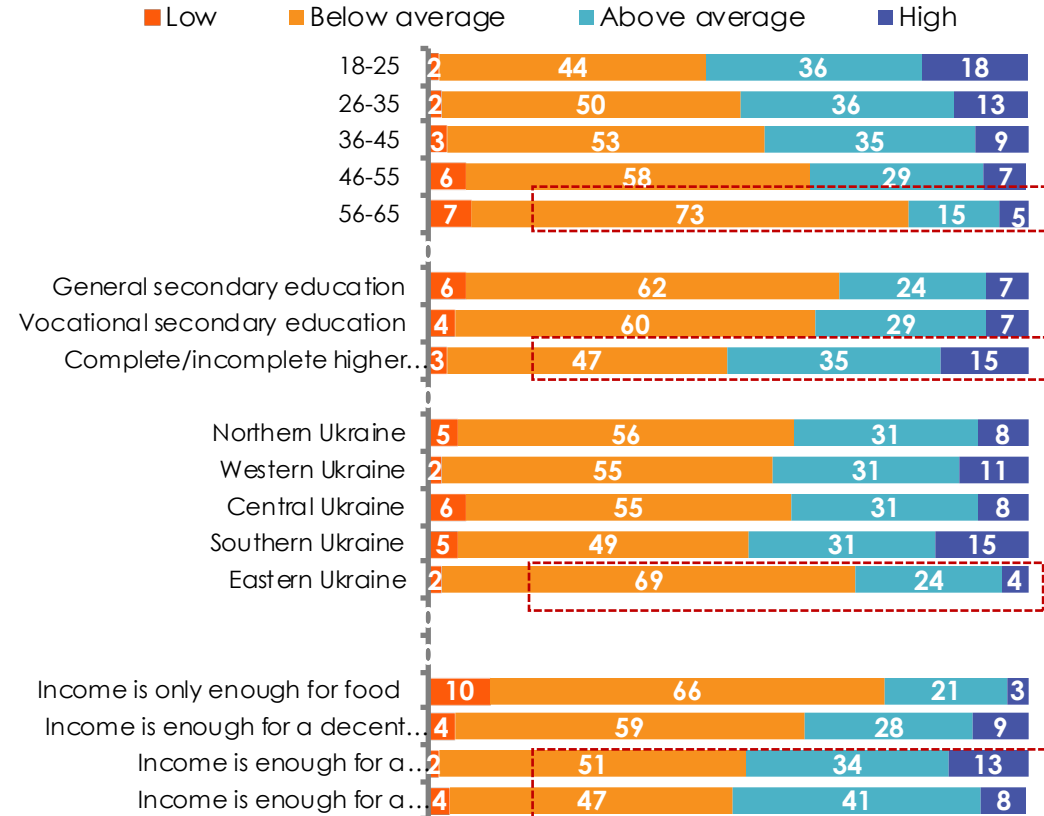
Source of data: all respondents, N= 2000;

* Accuracy of measurement = 0,05.

SUBINDEX II: USAGE

Sociodemographic breakdown of the findings*, %

- Media consumption profile: frequency and intensity as well as diversity of sources of information on sociopolitical topics depend on age, education, income level and location.
- Young population aged 18-25 has the highest level of media consumption.**
- The most diversified consumption** in terms of sources was found among the audience with high level of education and high/above average income.



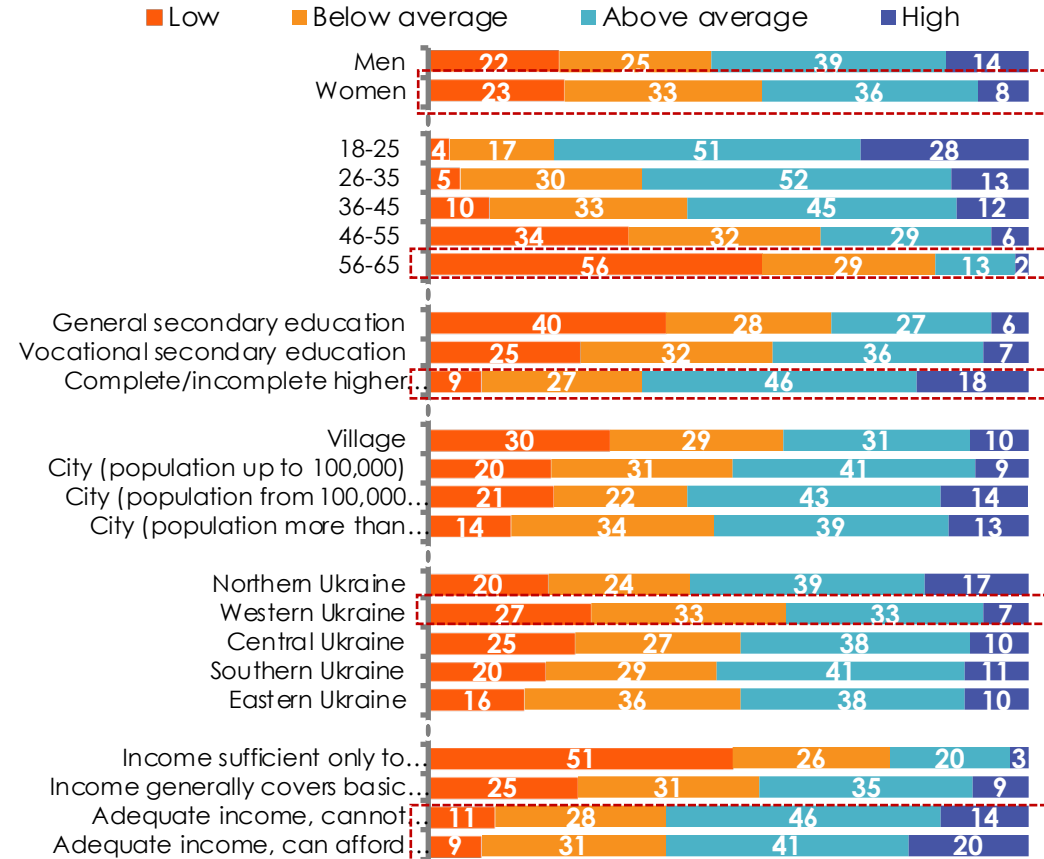
Source of data: all respondents, N= 2000;

* Accuracy of measurement = 0,05.

SUBINDEX III: DIGITAL COMPETENCE

- Young Ukrainians aged between 18 and 25 have the highest level of digital competence (**79%** for high and above average levels under this subindex). This criteria includes intensity of the Internet use, awareness of the ways new media work and of the terms they use, understanding of measures of digital security, use of modern devices and knowledge of how to create and post one's own content on the Internet.
- It is also obvious that the higher the levels of education and income of respondents, the higher is their digital competence score. High and above average levels of digital competence were established for **64%** and **61%** of respondents, respectively.

Sociodemographic breakdown of the findings*, %



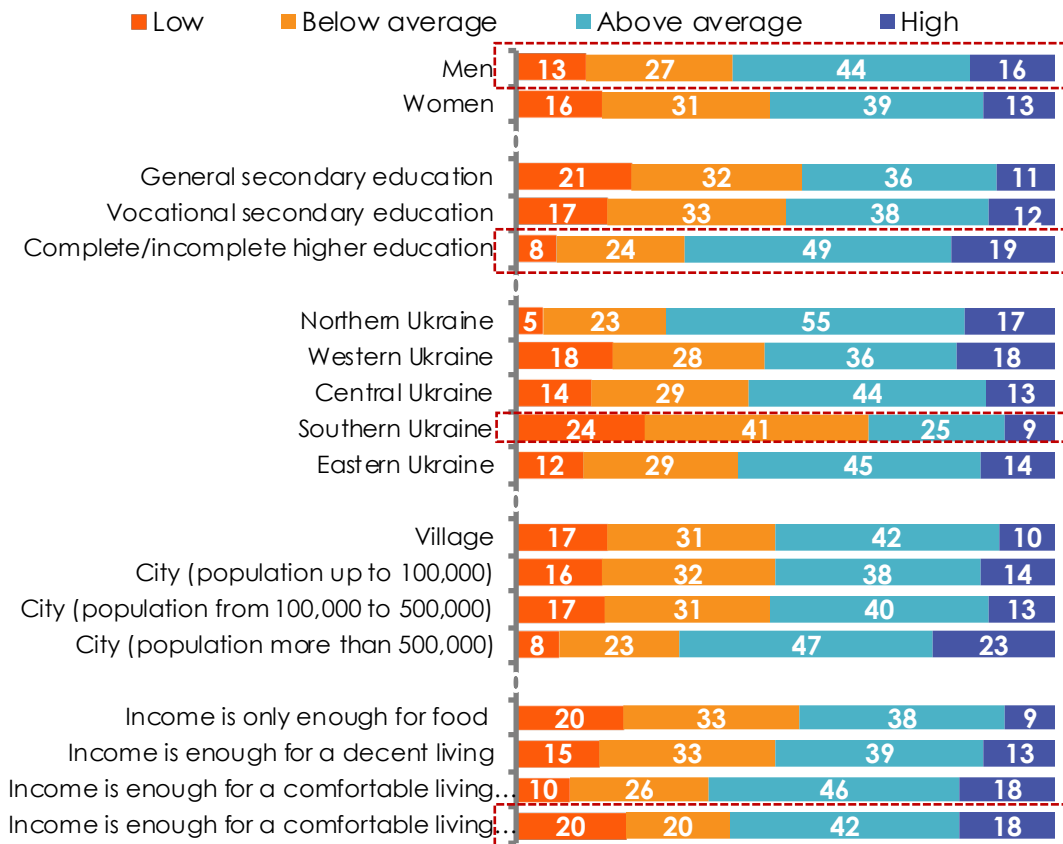
Source of data: all respondents, N= 2000;

* Accuracy of measurement = 0,05.

SUBINDEX IV: SENSITIVITY TO FALSIFIED MEDIA CONTENT

- Men are more sensitive to falsified media content than women (**60%** vs **52%**).
- Similar observation was made with regard to respondents with higher education (**68%**) and above average or high income (**64%**).
- The lowest score of sensitivity to falsified media content was found among the population of the southern parts of the country, while the highest one was shown by inhabitants of the northern parts.

Sociodemographic breakdown of the findings*, %



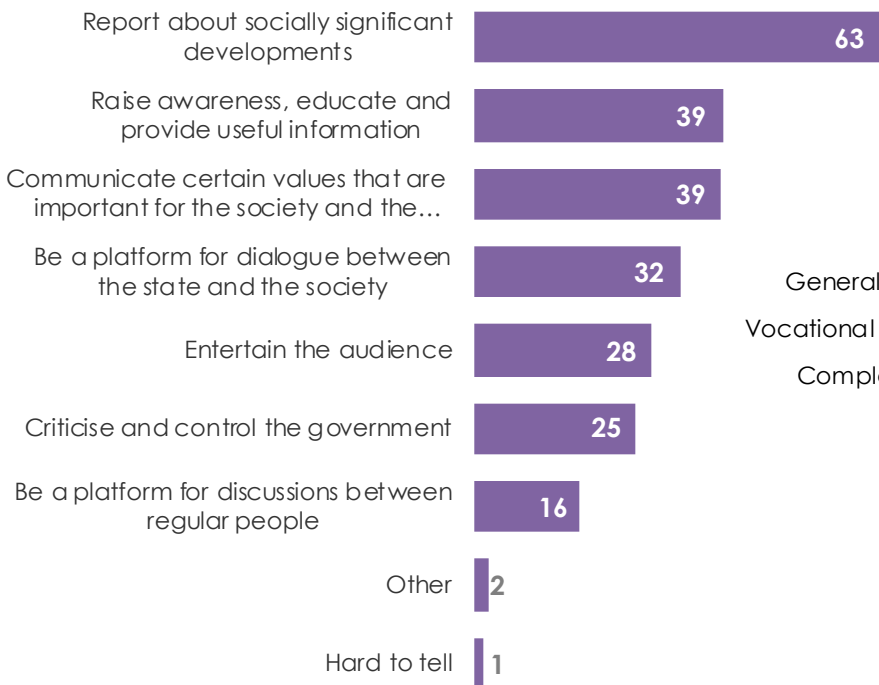
Source of data: all respondents, N= 2000;

* Accuracy of measurement = 0,05.

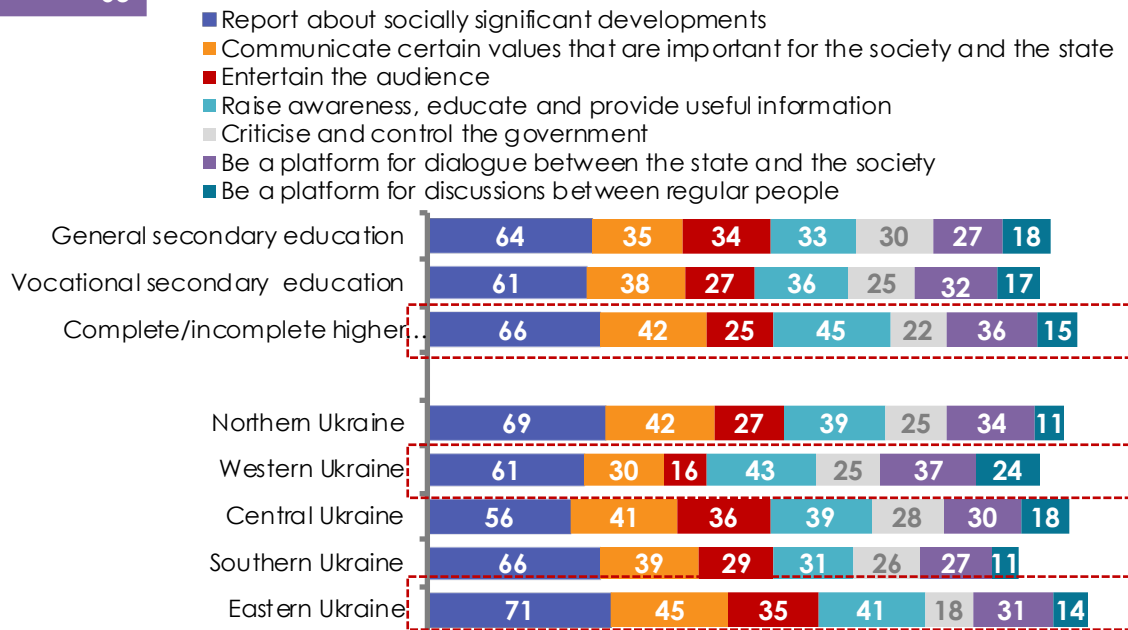
3. DETAILED FINDINGS OF THE SOCIOLOGICAL STUDY

3.1. The role of media in society and its influence on the audience

THE ROLE OF THE MEDIA IN SOCIETY



Breakdown by the level of education and region*, %

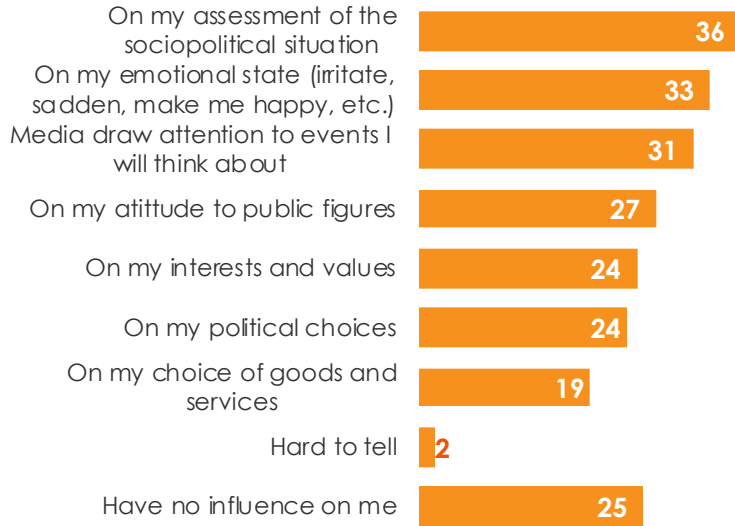


- Almost two thirds of Ukrainians (63%) think that **the primary purpose of media is to report about socially significant developments**. Media should also raise awareness, provide useful information and communicate certain values that are important for the society and the state (39% each). Every third respondent (32%) believes that media should be a platform for dialogue between the state and the society. 28% of respondents believe that media are meant to entertain the audience, whereas 25% consider it to be an institution for criticism and control of the government. 16% of respondents see media as a platform for discussions between regular people.

Source of data: all respondents, N= 2000. Question: *In your opinion, what are the main purposes of the media in society? Please, select no more than 3 options.*

* The difference is significant at the 0,05 level.

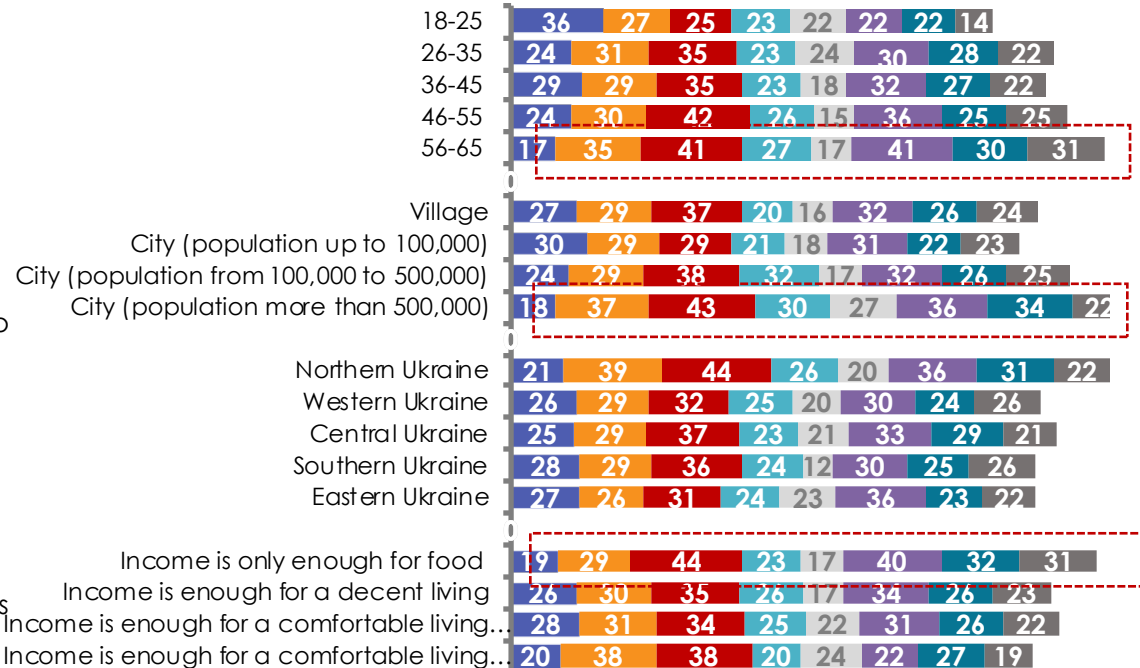
INFLUENCE OF THE MEDIA ON THE AUDIENCE



- Almost equal shares of respondents believe that media either **do not influence them at all** (25%) or, to the contrary, **do so quite significantly**, all the way to changing their values and interests (24%).
- Most respondents (36%) admit that media influence their assessment of the sociopolitical situation. Every third (33%) reports a change in his/her emotional state after review of certain content. 31% believe that by focusing on certain developments media shape specific “agenda”.
- Media also influence attitudes towards public figures (27%), political choices (24%), as well as those of goods and services (19%).

Breakdown by age, population area type, region and income level, %

- Have no influence on me
- Media attract attention to events I will think about and discuss
- On my assessment of the sociopolitical situation
- On my interests and values
- On my choice of goods and services
- On my emotional state
- On my attitude towards public figures
- On my political choices, i.e. decisions to support a politician/party



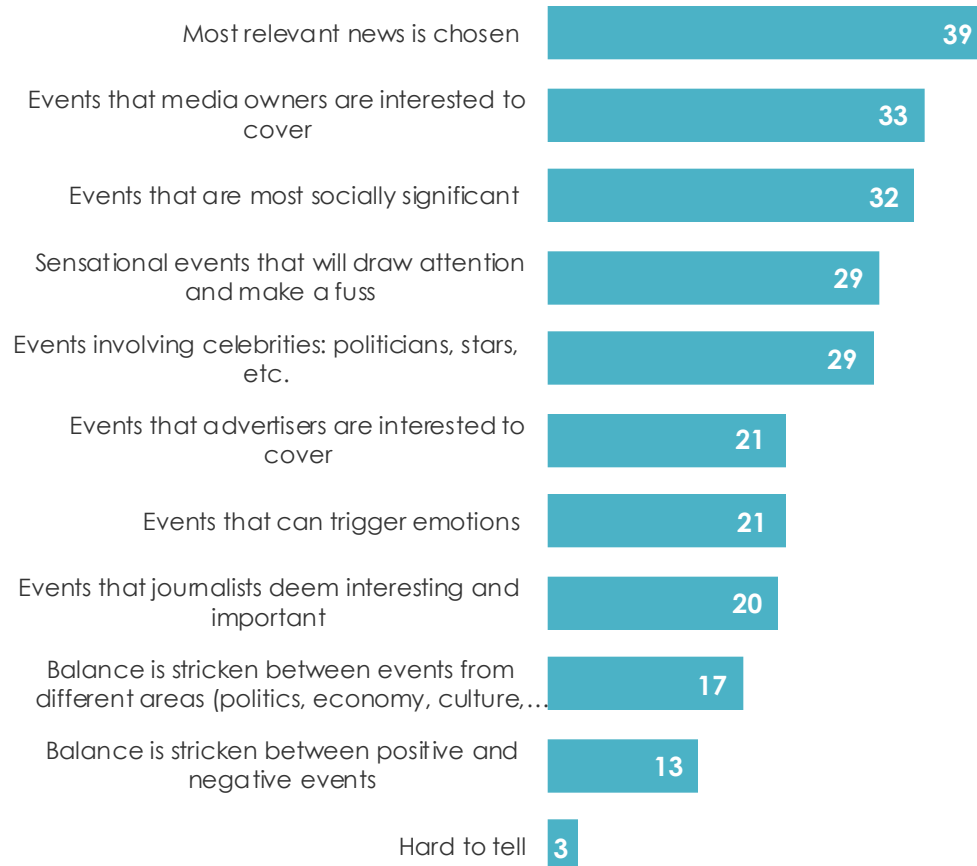
Source of data: all respondents, N= 2000; Question: How do the media influence you personally? Choose only the statements you agree with.

* accuracy of measurement = 0,05

3. DETAILED FINDINGS OF THE SOCIOLOGICAL STUDY

3.2. Beliefs about the work of the media industry and perceptions of the Ukrainian media landscape

FACTORS SHAPING MEDIA CONTENT



- The audience believes that the main criteria for the selection of developments to be reported by media include:
 - ✓ Relevance (39%);
 - ✓ Media owners' interest in their coverage (33%);
 - ✓ Social significance (32%);
 - ✓ Sensationalism (29%);
 - ✓ Involvement of celebrities (politicians, stars, etc.) (29%).

FACTORS SHAPING MEDIA CONTENT

Breakdown by region and income level, %

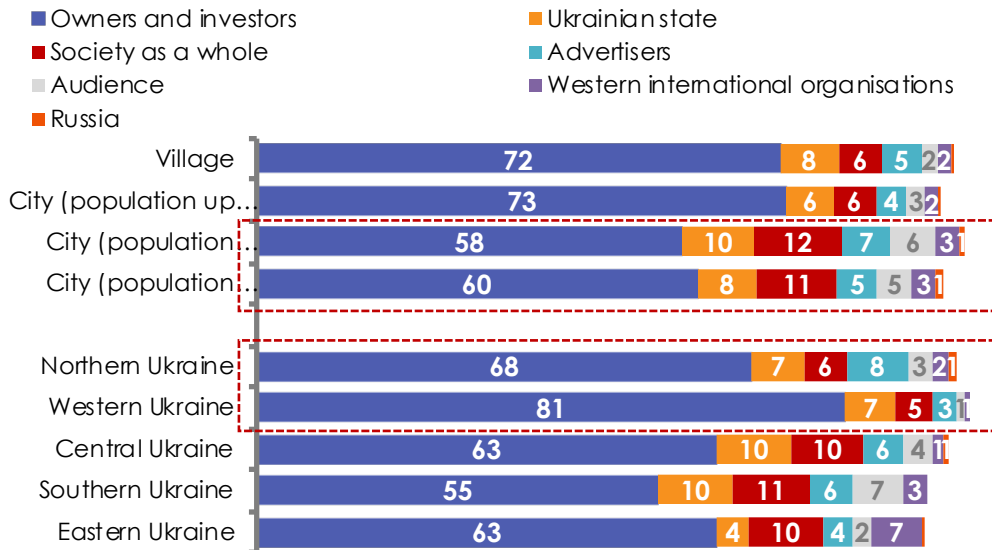
	REGION*					INCOME LEVEL*			
	Northern Ukraine	Western Ukraine	Central Ukraine	Southern Ukraine	Eastern Ukraine	Income is only enough for food	Income is enough for a decent living	Income is enough for a comfortable living (no savings accumulated)	Income is enough for a comfortable living (savings accumulated)
Most relevant news is chosen	48%	32%	38%	40%	35%	43%	41%	34%	36%
Events that are most socially significant	39%	30%	30%	33%	29%	38%	32%	30%	34%
Events that media owners are interested to cover	36%	36%	31%	30%	29%	35%	32%	34%	30%
Sensational events that will draw attention and make a fuss	34%	22%	33%	27%	30%	31%	28%	30%	26%
Events involving celebrities: politicians, stars, etc.	30%	24%	30%	26%	33%	27%	29%	29%	28%
Events that advertisers are interested to cover	22%	22%	22%	18%	20%	20%	19%	25%	18%
Events that journalists deem interesting and important	16%	23%	20%	22%	20%	17%	21%	19%	23%
Balance is stricken between events from different areas (politics, economy, culture, etc.)	16%	12%	19%	21%	22%	9%	19%	18%	17%
Events that can trigger emotions	14%	26%	22%	17%	24%	18%	20%	22%	23%
Balance is stricken between positive and negative events	9%	17%	13%	11%	17%	9%	13%	15%	16%

Source of data: all respondents, N= **2000**. Question: *How do media choose events to report on in news? Choose 3 main criteria for the selection of news by media.*

* accuracy of measurement = 0,05

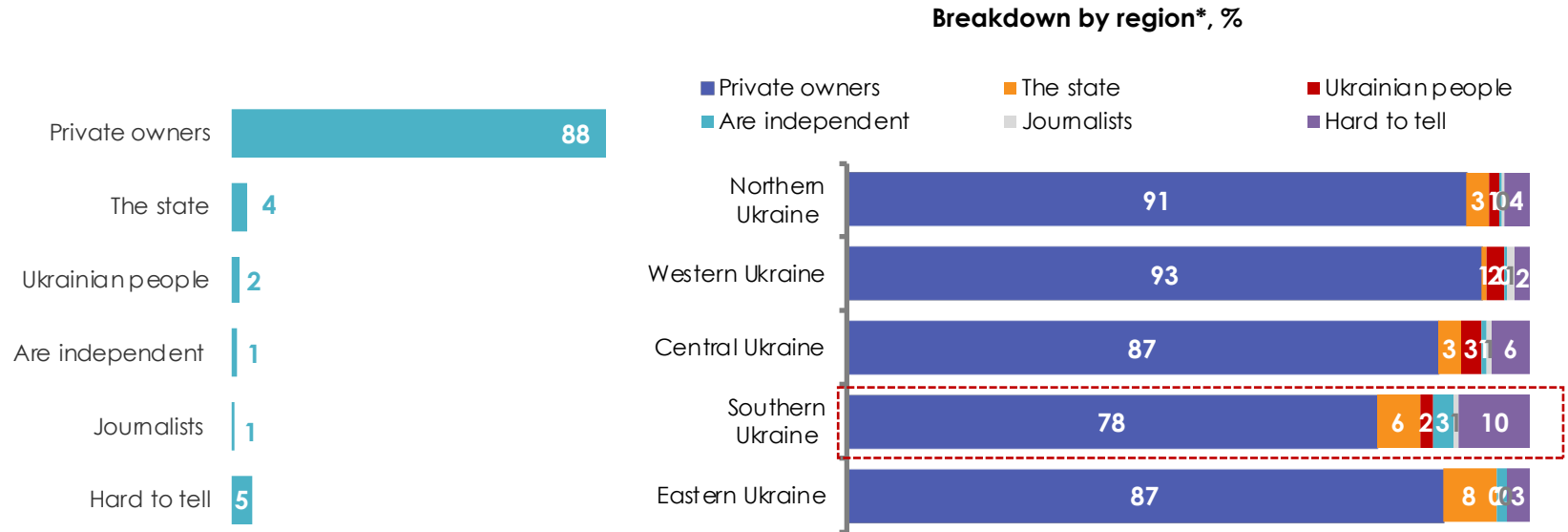
WHOSE INTERESTS DO MEDIA SERVE?

Breakdown by age, population area type and region, %



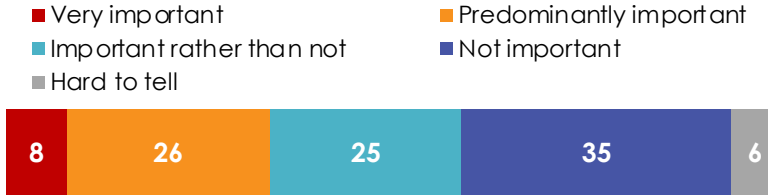
- Two out of three Ukrainians (67%) believe that **media serve the interests of their owners**, not those of the state (8%) or society (8%).
- There are significant differences between residents of western and eastern parts of the country. Whereas 81% of the former think that media owners and investors control media content, only 55% of the latter share this point of view.

OWNERS OF UKRAINIAN MEDIA



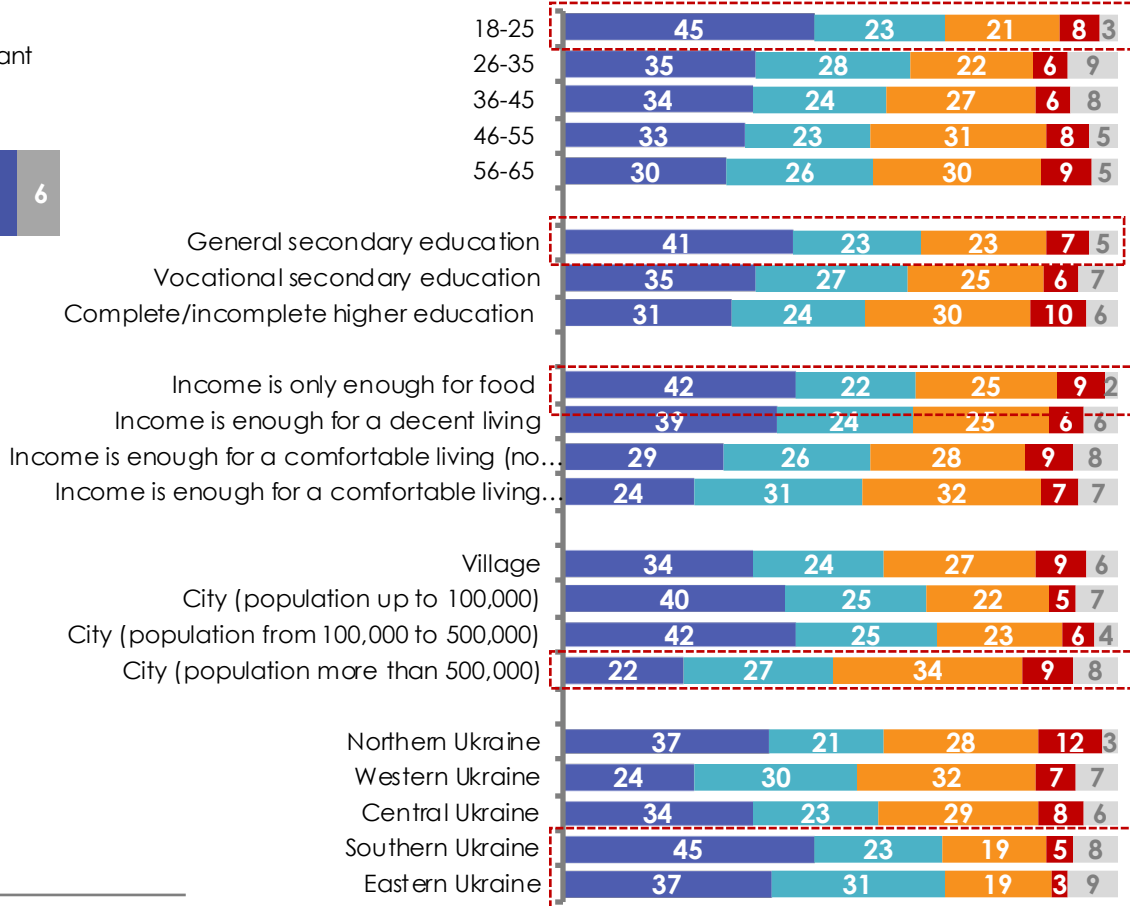
- The audience is well aware (88%) of the fact that most Ukrainian media are privately owned. 4% of respondents are convinced that media are controlled by the state, whereas 2% believe that they are controlled by the people of Ukraine.

IS IT IMPORTANT TO KNOW WHO OWNS A MEDIA?



- Only a third of respondents (34%) said it was important/predominantly important for them to know who owned a media. 59% of respondents are not interested in this kind of information.
- Young people (68%), people with low educational status and income level (64% each), residents of cities with a population from 101 to 500 thousand (67%) and residents of eastern regions (68%) are the least interested to find out who really controls a media.

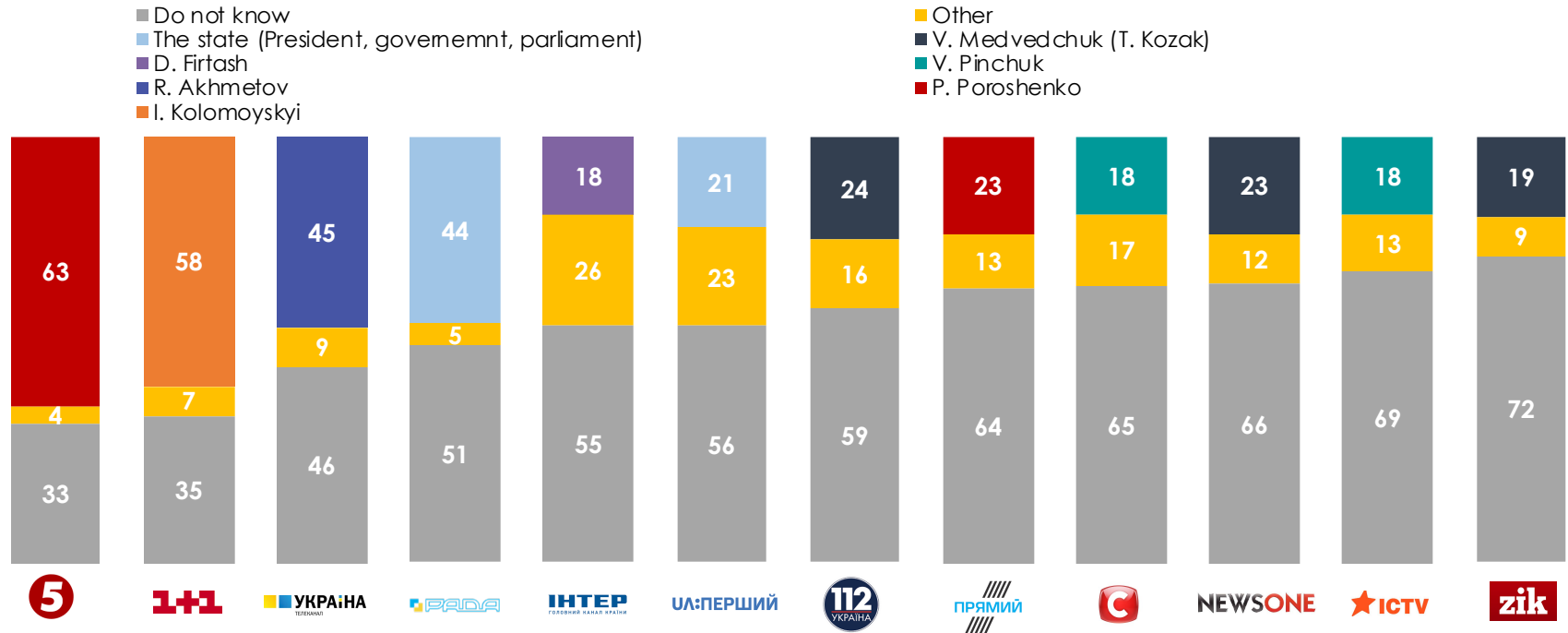
Breakdown by age, educational status, income level, population area type and region*, %



Source of data: all respondents, N= 2000. Question: How important is it for you to know who owns a media?

* accuracy of measurement = 0,05

OWNERS OF TV CHANNELS



- Most often Ukrainians know who are the owners of the following TV channels: **Channel 5 (63%)**, **1+1 (58%)**, **“Ukraine” (45%)** and **“Rada” (44%)**. No more than a quarter of the audience knows who controls such TV channels as **Inter (18%)**, **112 (24%)**, **Priamyi (23%)**, **STB (18%)**, **NEWSONE (23%)**, **ICTV (18%)** and **ZIK (19%)**.
- Only 21% of Ukrainians know that **UA:Persnyi** is a public broadcaster.

3. DETAILED FINDINGS OF THE SOCIOLOGICAL STUDY

3.2. Media landscape regulation awareness and attitudes towards public broadcasting

MEDIA REGULATION

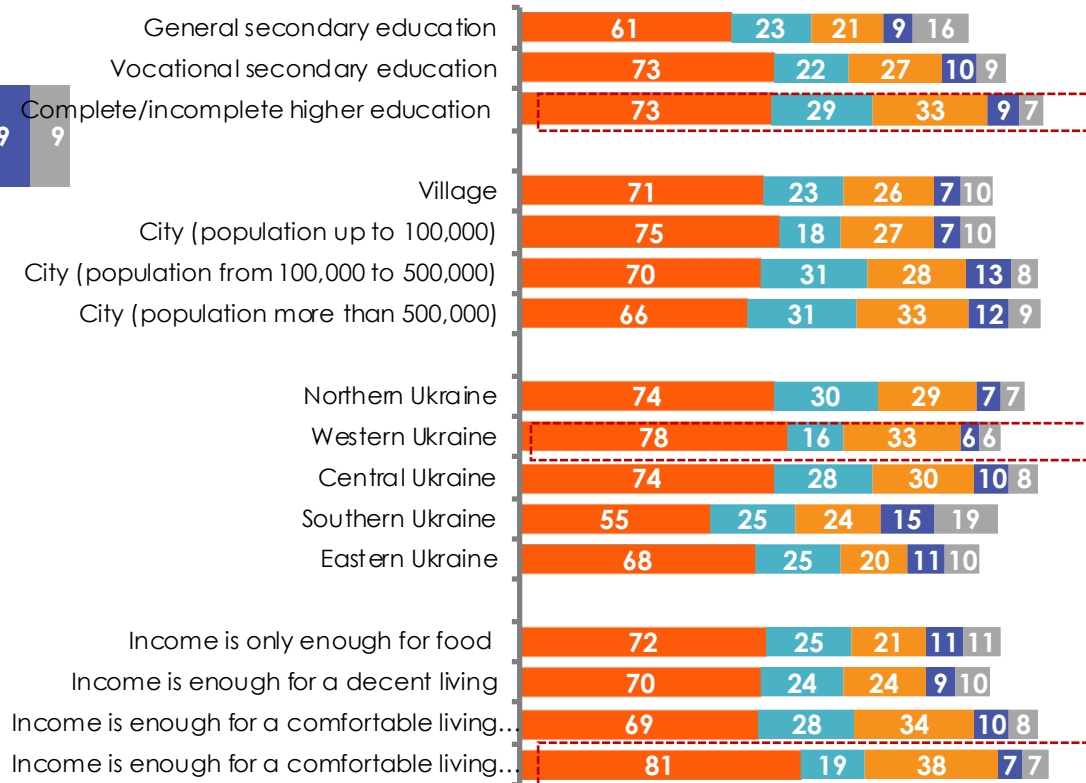
Breakdown by educational status, population area type, region and income level*, %

- Regulated by media owners
- Regulated by market competition
- Hard to tell

- Regulated by the state (including when a media is owned by the state)
- Regulated by journalists



- Less than a third of Ukrainians (28%) know that **media are regulated by the state**. Most respondents believe that media content is primarily influenced by their owners (71%). Every fourth (25%) respondent assumes that messages are influenced by market competition, whereas 9% believe that media are regulated by journalists themselves.
- The higher the educational and income level, the more often the state is mentioned as a media landscape regulator.



Source of data: all respondents, N= 2000. Question: How are Ukrainian media regulated? Choose all options you agree with

* accuracy of measurement = 0,05

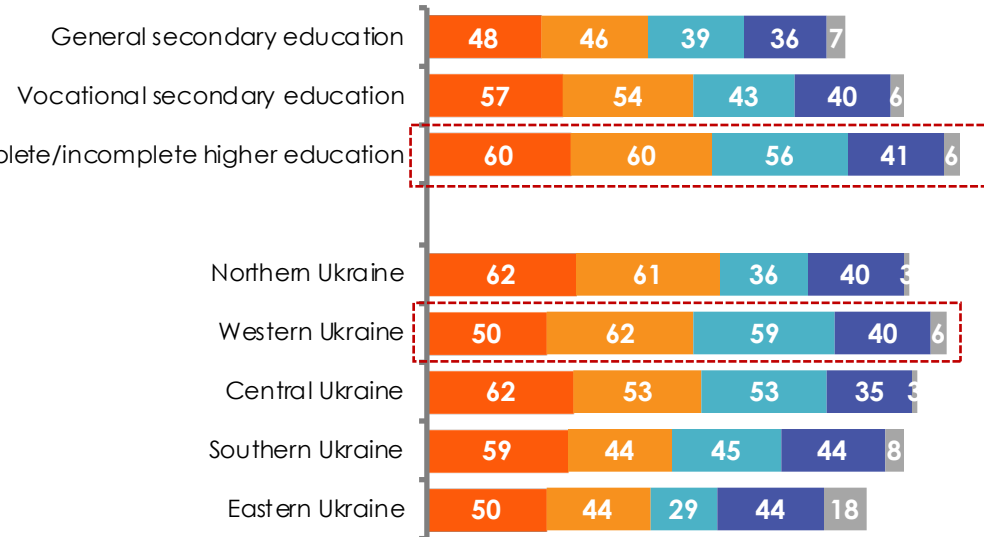
STATE MEDIA REGULATION

Breakdown by educational status and region*, %

- Issues broadcasting permits (issues licenses, distributes frequencies)
- Performs supervisory functions and introduces sanctions in case broadcasting rules are breached (hate speech, demonstration of violence, etc.)
- Creates legal framework for media operation
- Controls content of messages, introduces censorship
- Hard to tell



- Respondents who know about the regulatory role of state with respect to media (28% of the audience) contain almost equal shares of those who believe that this function is implemented through the **issuance of broadcasting permits (licensing)** (57%) and performance of **supervisory functions** (55%). Every second (48%) respondent believes that this function is implemented through the formation of the legal framework for the media. Finally, 40% see the regulatory role of state with respect to media in its direct control over the content of messages (**censorship**).



Source of data: those who think that media are regulated by the state. N= 563; Question: *How specifically does the state regulate media? Please, choose all options you agree with.*

* accuracy of measurement = 0,05

IS THERE CENSORSHIP IN UKRAINE?

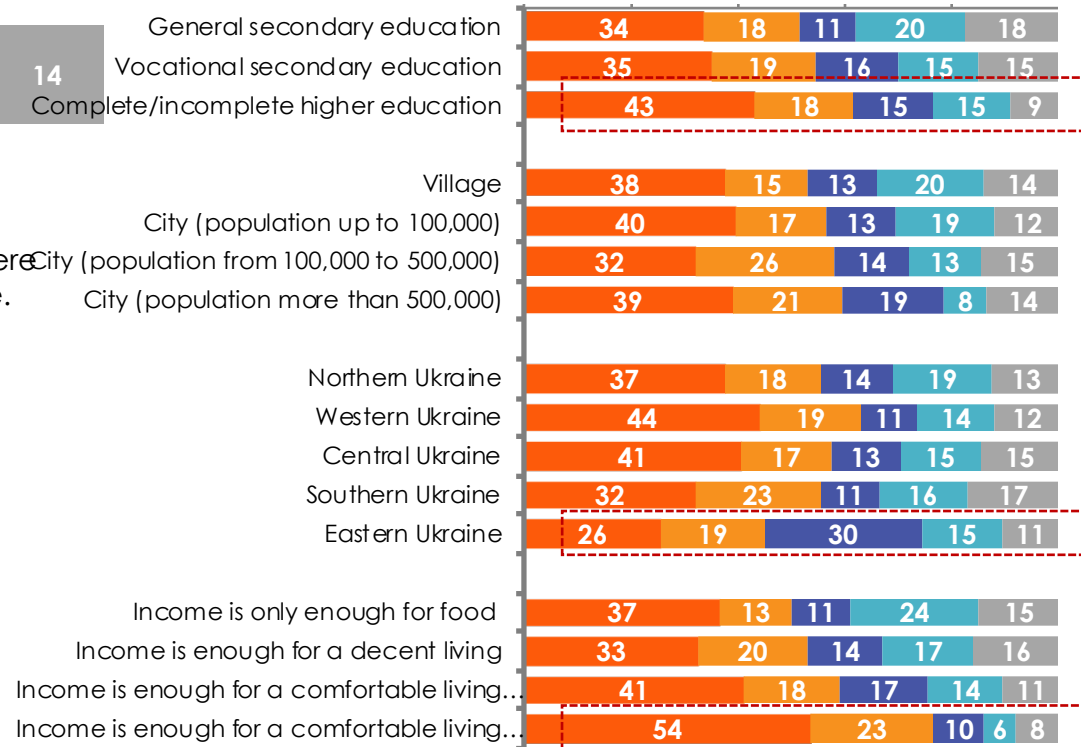
Breakdown by educational status, population area type, region and income level*, %

- There is no official censorship, but there is secret censorship
- There is neither official censorship nor in practice
- Hard to tell

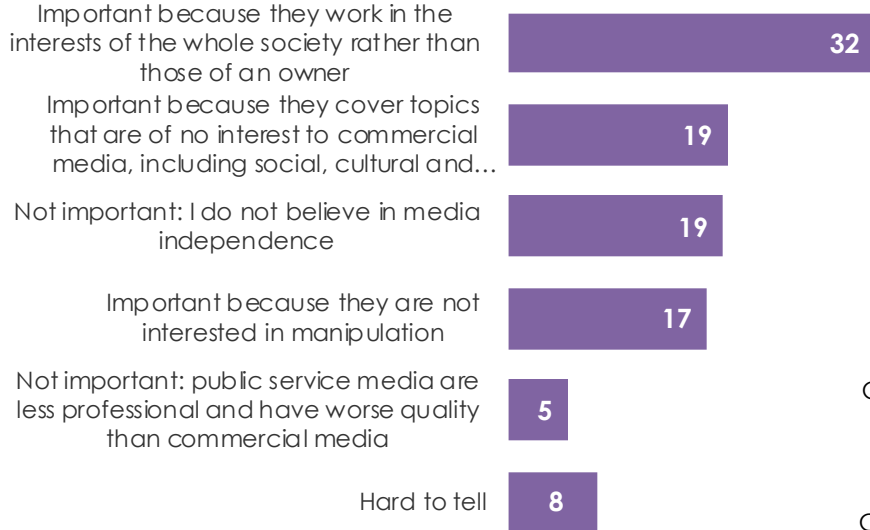


- Every second (52%) respondent believes that there is no official state censorship of media in Ukraine. However, 38% of them are convinced that such censorship exists in practice. 16% believe that neither is the case.
- A third of respondents (33%) think that there is official state censorship of media in the country. 19% of them believe that media are censored both officially and in practice, whereas the remaining 14% believe that censorship is only official, but content is not censored in practice. 14% are not sure whether censorship exists in Ukraine or not.

- Censorship exists both officially and in practice
- There is official censorship but media content is not controlled

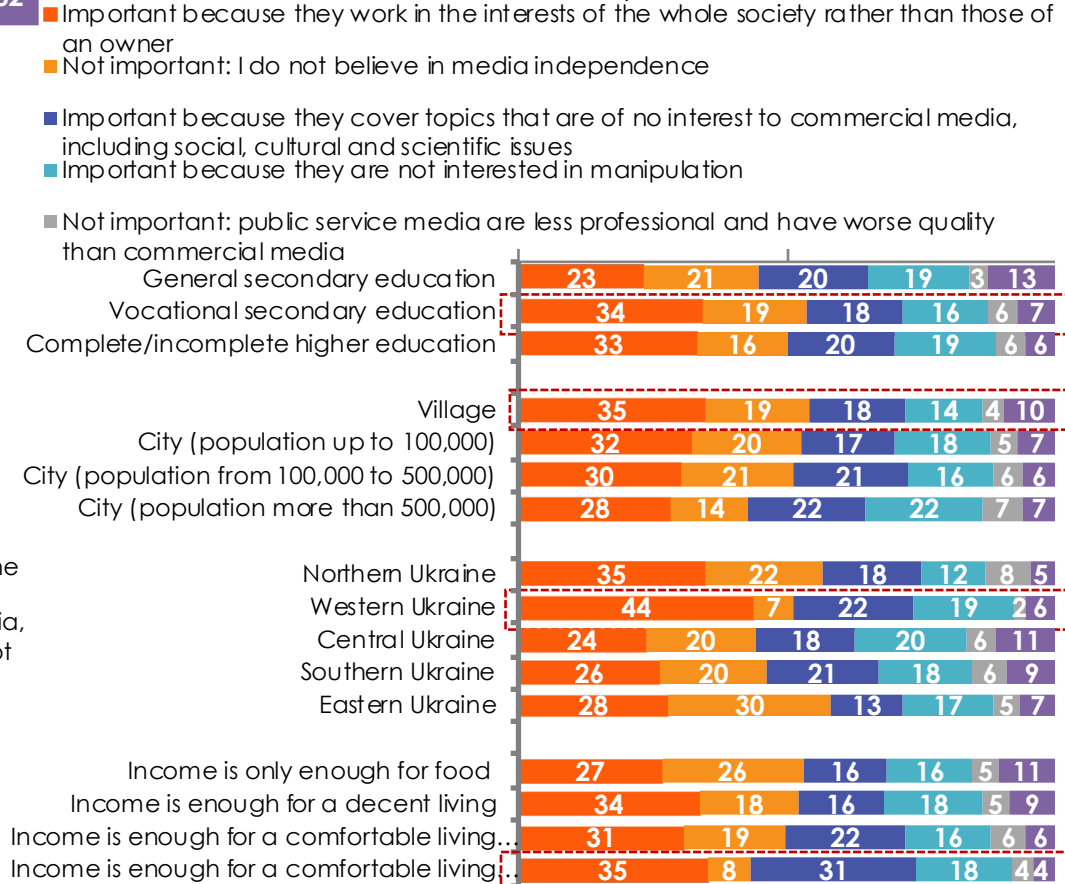


IMPORTANCE OF PUBLIC MEDIA



- Two thirds of the Ukrainian audience (68%) emphasize the **importance of public service media**, given that they work in the interests of the whole society rather than those of an owner (32%), cover topics that are of no interest to commercial media, including social, cultural and scientific issues (19%), and are not interested in manipulation (17%).
- A quarter (24%) of respondents have **no interest in the development of public broadcasting**, because they do not believe that media can be independent (19%), as well as because in their opinion public service media are less professional and have worse quality than commercial media (5%).

Breakdown by educational status, population area type, region and income level*, %

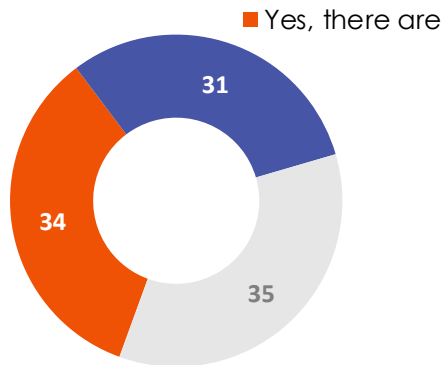


Source of data: all respondents, N= 2000. Question: In your opinion, is it important to establish public media that are editorially independent from officials and business?

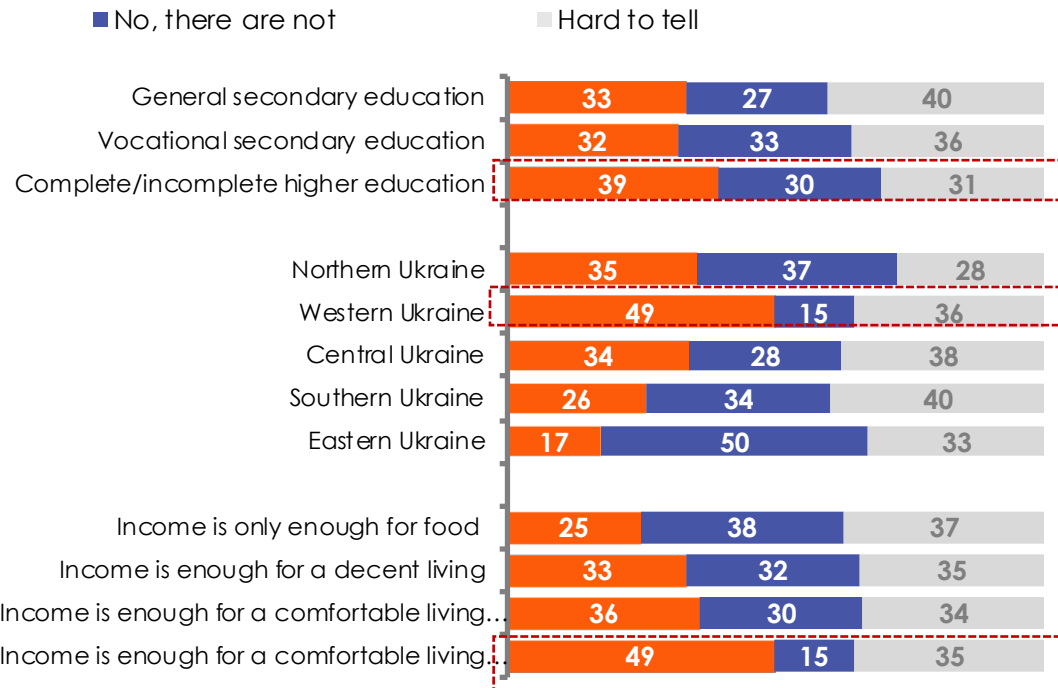
* accuracy of measurement = 0,05

ARE THERE PUBLIC MEDIA IN UKRAINE?

Breakdown by educational status, population area type, region and income level*, %

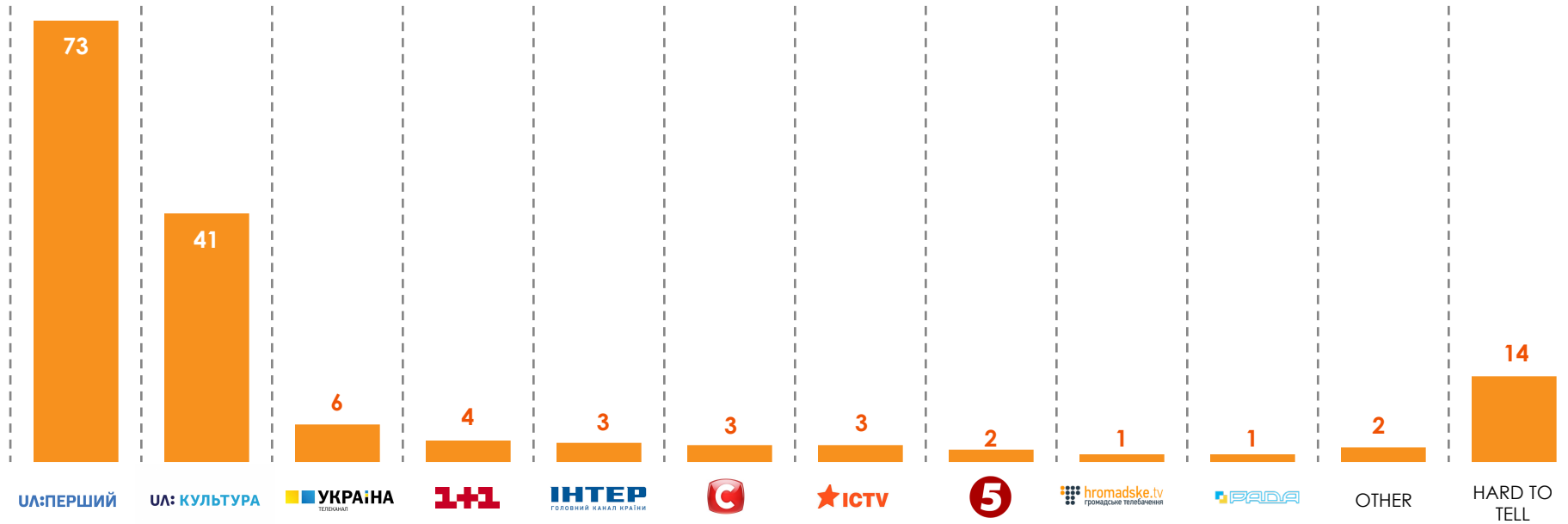


Only a third of respondents (35%) **know that there are public service media** in Ukraine. 31% are convinced that they do not exist in the country, whereas 35% found it hard to tell.



Source of data: all respondents, N= 2000. Question: *Are there public media in Ukraine?*
* accuracy of measurement = 0,05

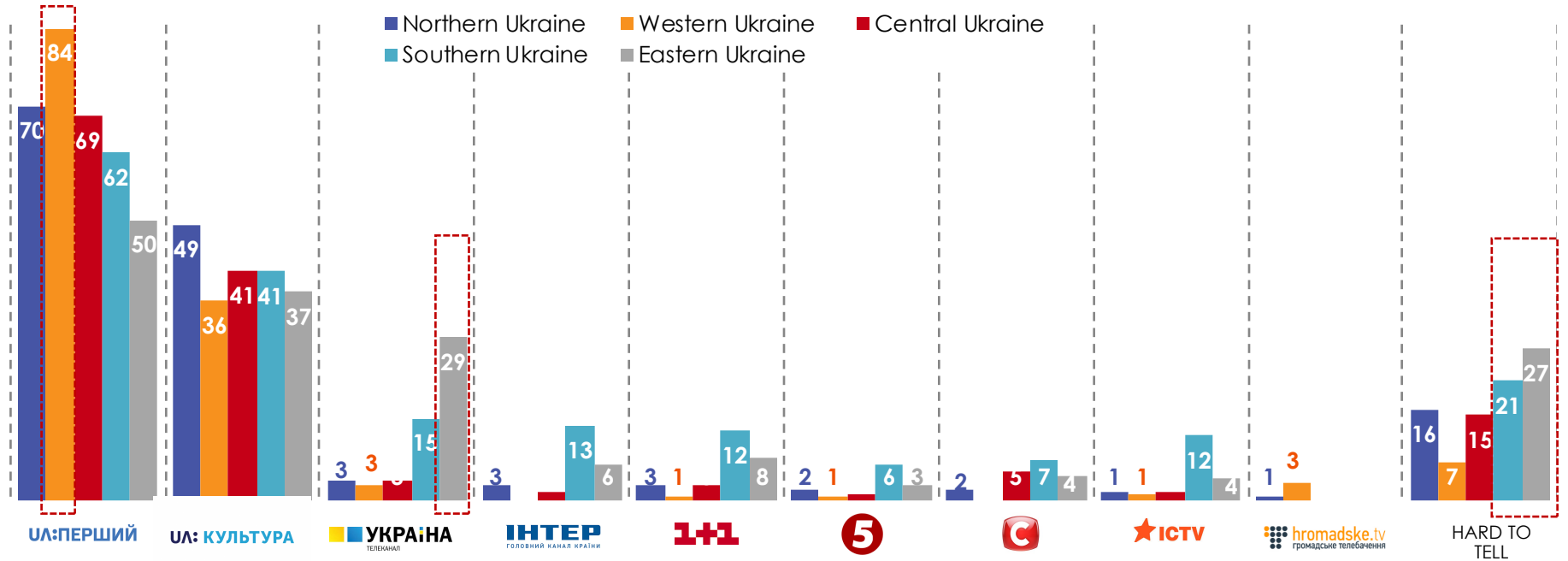
PUBLIC TV CHANNELS



- Those who are aware of the existence of public broadcasting in Ukraine (34% of respondents) most often mentioned **UA:Pershyi** (73%) and **UA:Culture** (41%) as examples of public broadcasters.

PUBLIC TV CHANNELS

Breakdown by region*, %



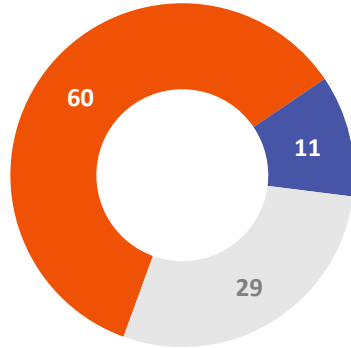
- It is noteworthy that awareness about public TV channels is higher in western, northern and central regions, as opposed to eastern and southern regions.

Source of data: those who think that there are public TV channels in Ukraine, N=690. Question: Which Ukrainian national TV channels are public?

* accuracy of measurement = 0,05

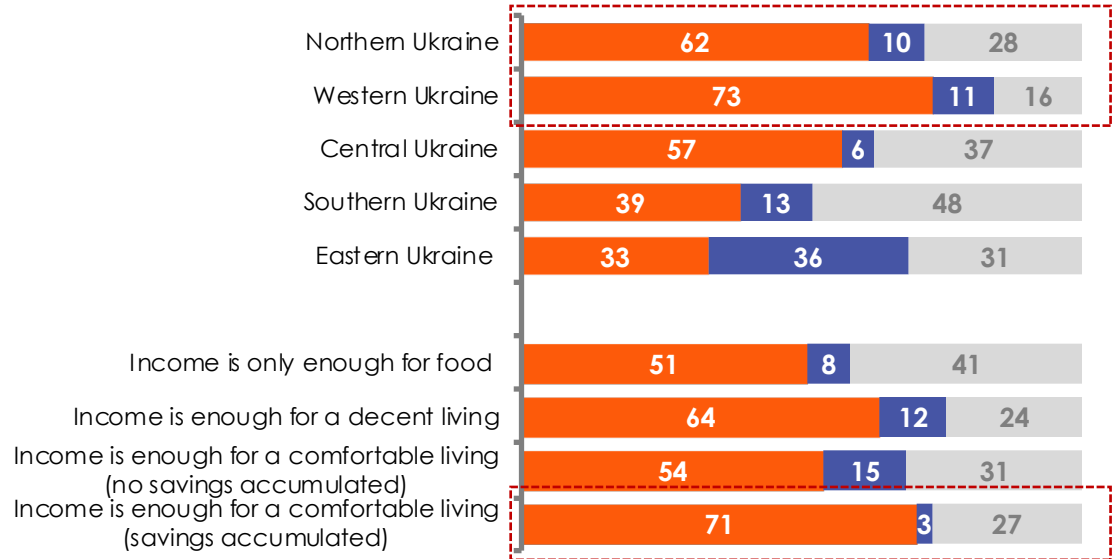
REGIONAL PUBLIC TV CHANNELS

■ Yes, there are ■ No, there are not ■ Hard to tell



- **60%** among those aware of the existence of public broadcasting in Ukraine (**34%** of the audience) know about the existence of regional public TV channels in their respective regions. **11%** believe there is no public broadcasting in their regions, while another **29%** don't know for sure.

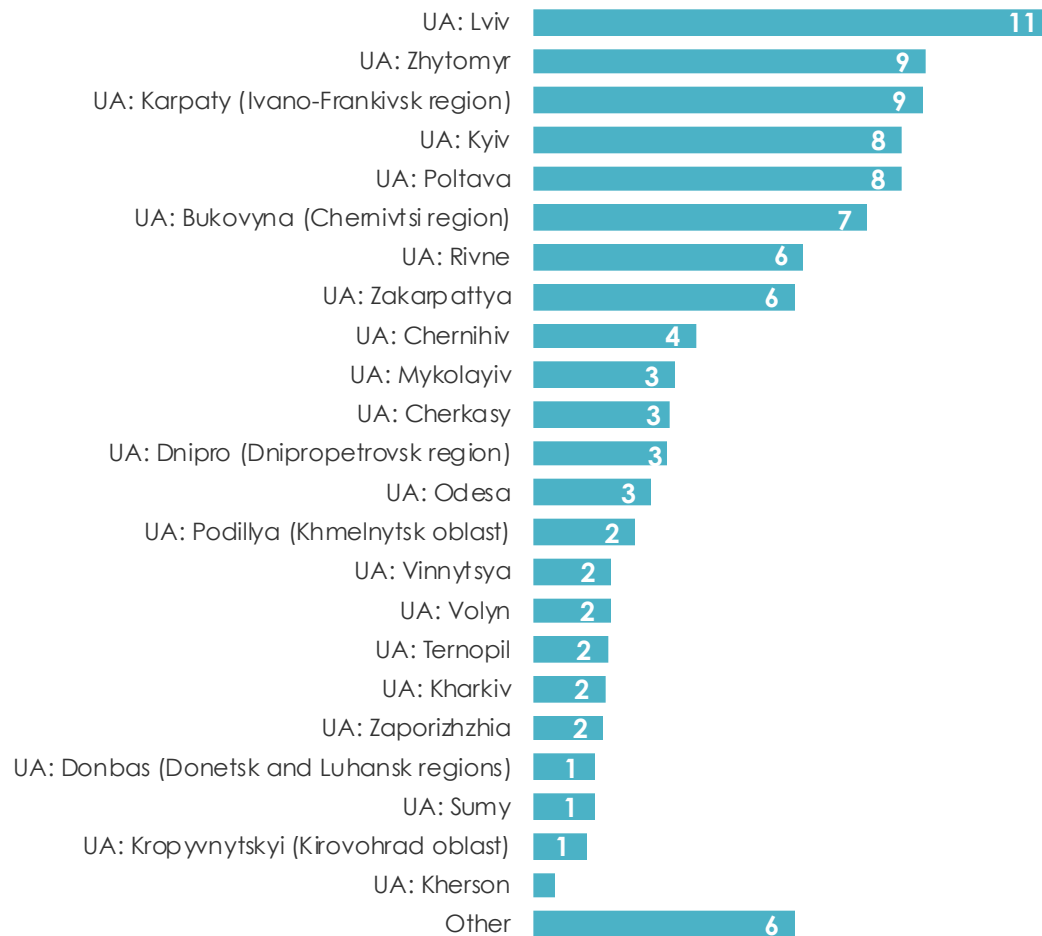
Breakdown by region and income level*, %



Source of data: those who think that there are public TV channels in Ukraine, N=690. Question: *Are there public TV channels in your region?*

* accuracy of measurement = 0,05

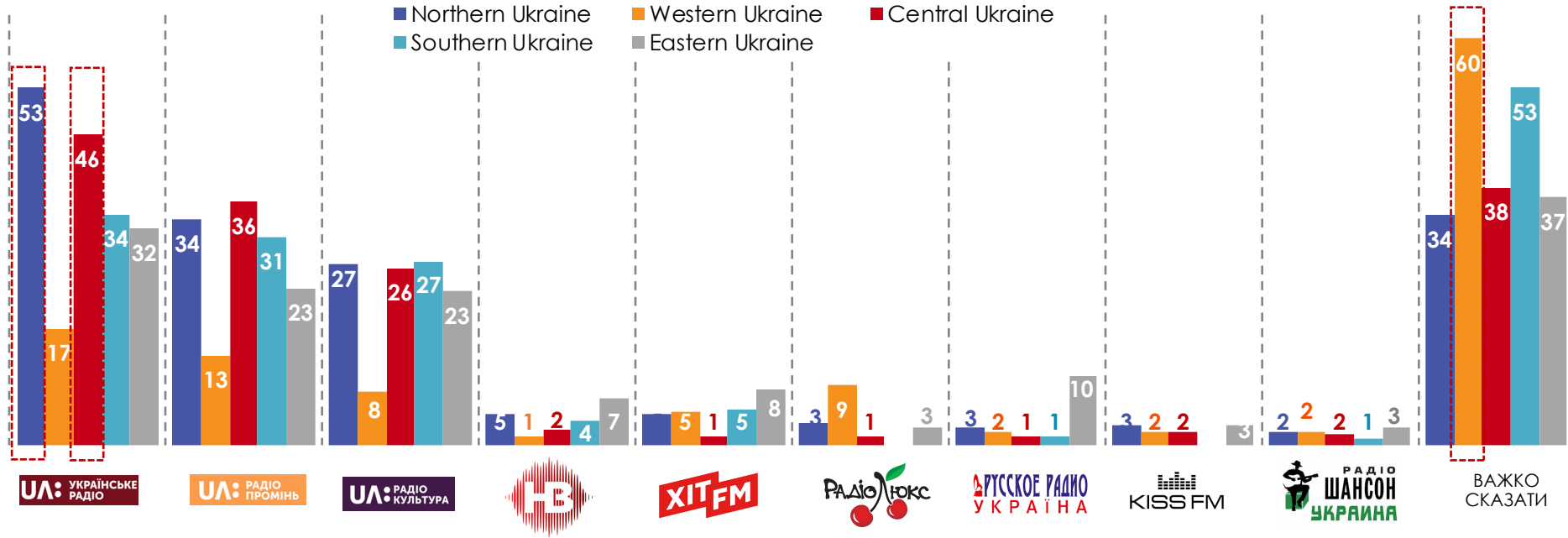
REGIONAL PUBLIC TV CHANNELS



Source of data: those who know that there are public TV channels in their respective regions, N=414; Question: *What is your regional public TV channel?*

* accuracy of measurement = 0,05

PUBLIC RADIO STATIONS



- Level of awareness about public radio stations among the audience in western regions is smaller than almost in any other region of the country.

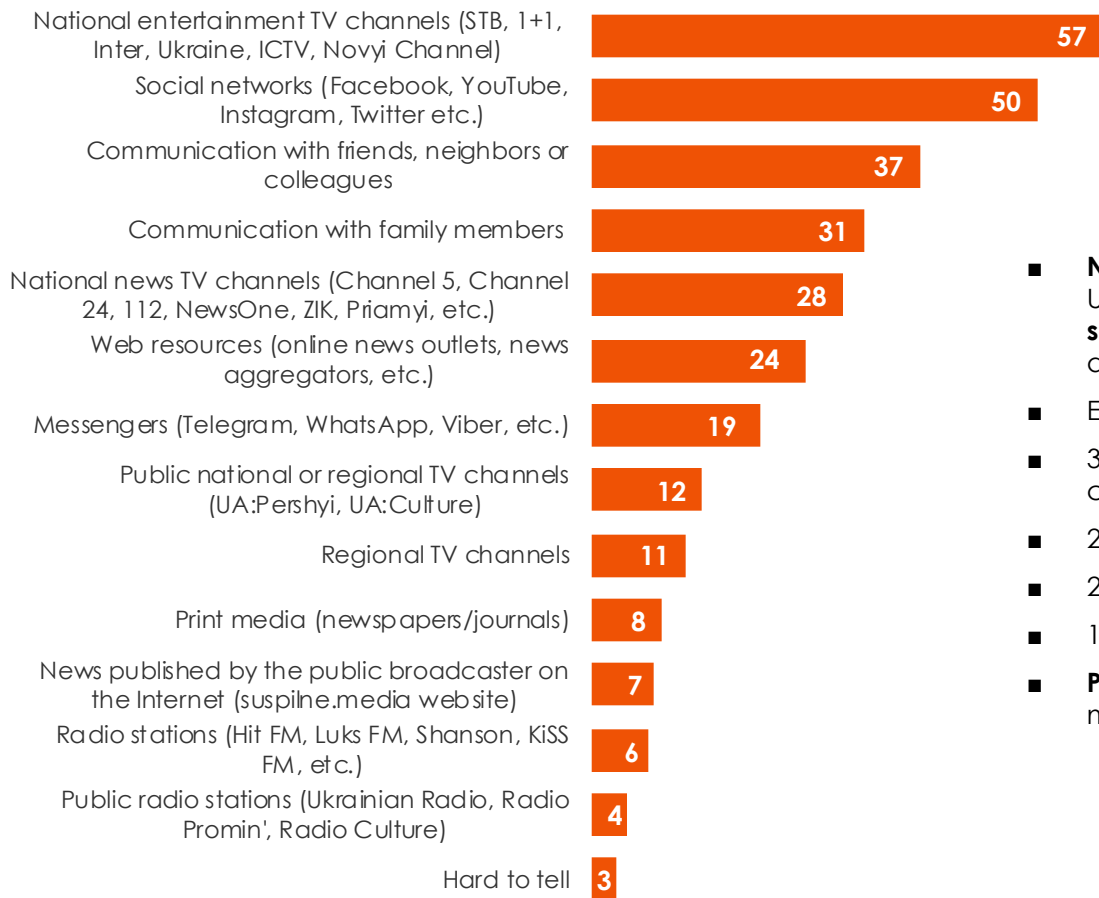
Source of data: those who think that there are public media in Ukraine, N=690. Question: Which Ukrainian national TV stations are public?

* accuracy of measurement = 0,05

3. DETAILED FINDINGS OF THE SOCIOLOGICAL STUDY

3.3. Media consumption: sources and frequency of receipt of information on sociopolitical topics

SOURCES OF INFORMATION ON SOCIOPOLITICAL TOPICS



- **National entertainment TV channels** (STB, 1+1, Inter, Ukraine, etc.) are the **leading sources of information on sociopolitical topics**, with 57% of the Ukrainian audience watching them to that end.
- Every second (50%) respondent **uses social networks**
- 37% and 31% of respondents mentioned communication with **friends and family**, respectively
- 28% of respondents watch **national news TV channels**
- 24% refer to **web resources**.
- 19% of the Ukrainian audience refer to **messengers**.
- **Public national or regional channels** are used by the mere 12% of respondents.

Source of data: all respondents, N= 2000; Question: *Where do you receive information on sociopolitical topics?*

SOURCES OF INFORMATION ON SOCIOPOLITICAL TOPICS

	GENDER*		AGE*					EDUCATION*		
	Men	Women	18-25	26-35	36-45	46-55	56-65	General secondary education	Vocational secondary education	Complete/incomplete higher education
National entertainment TV channels (STB, 1+1, Inter, Ukraine, ICTV, Novyi Channel)	54%	60%	41%	46%	56%	71%	69%	60%	58%	55%
Social networks (Facebook, YouTube, Instagram, Twitter etc.)	47%	53%	73%	63%	55%	39%	26%	37%	47%	60%
Communication with friends , neighbors or colleagues	38%	36%	34%	31%	37%	41%	41%	32%	36%	40%
Communication with family members	30%	31%	26%	26%	31%	36%	33%	27%	30%	33%
National news TV channels (Channel 5, Channel 24, 112, NewsOne, ZIK, Priamyi, etc.)	29%	27%	11%	18%	23%	39%	46%	31%	29%	25%
Web resources (online news outlets, news aggregators, etc.)	27%	22%	29%	25%	30%	24%	14%	16%	20%	34%
Messengers (Telegram, WhatsApp, Viber, etc.)	18%	19%	36%	27%	17%	12%	7%	14%	16%	25%
Public national or regional TV channels (UA:Persnyi, UA:Culture)	14%	11%	7%	8%	10%	17%	19%	10%	13%	13%
Regional TV channels	11%	10%	6%	7%	8%	11%	19%	8%	11%	11%
News published by the public broadcaster on the Internet (suspiilne.media website)	9%	5%	6%	8%	7%	8%	4%	4%	6%	9%
Radio stations (Hit FM, Luks FM, Shanson, KiSS FM, etc.)	8%	5%	6%	6%	8%	7%	5%	4%	6%	8%
Print media (newspapers/journals)	8%	8%	3%	4%	5%	11%	15%	8%	8%	7%
Public radio stations (Ukrainian Radio, Radio Promin', Radio Culture)	5%	3%	1%	3%	5%	4%	6%	3%	3%	5%

Source of data: all respondents, N= **2000**; Where do you receive information on sociopolitical topics?

* accuracy of measurement = 0,05

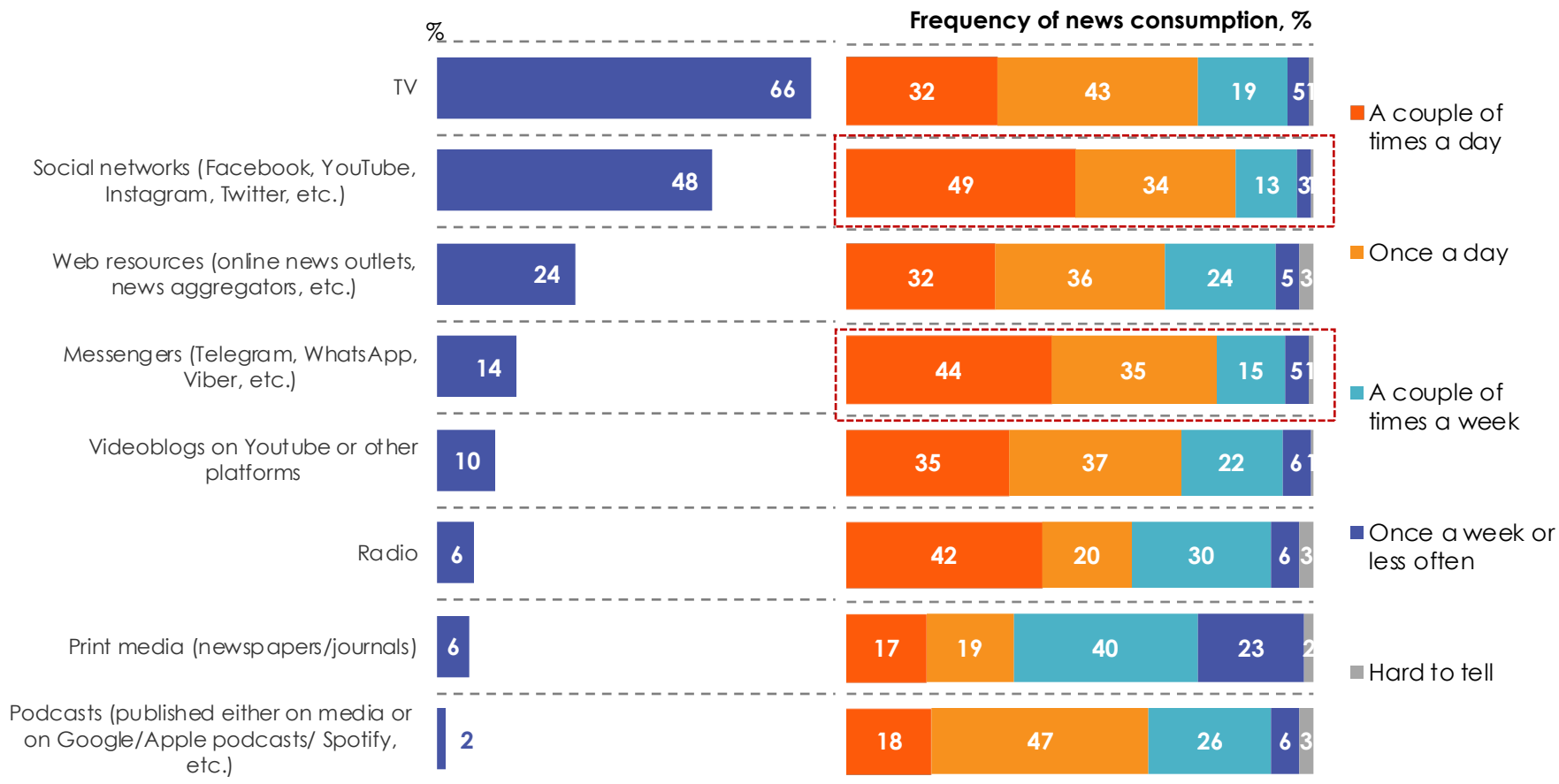
SOURCES OF INFORMATION ON SOCIOPOLITICAL TOPICS

	REGION*					POPULATION AREA*				INCOME LEVEL*			
	Northern Ukraine	Western Ukraine	Central Ukraine	Southern Ukraine	Eastern Ukraine	Village	City (population up to 100,000)	City (population from 100,000 to 500,000)	City (population on more than 500,000)	Income is only enough for food	Income is enough for a decent living	Income is enough for a comfortable living (no savings accumulated)	Income is enough for a comfortable living (savings accumulated)
National entertainment TV channels (STB, 1+1, Inter, Ukraine, ICTV, Novyi Channel)	62%	54%	60%	63%	42%	62%	58%	54%	52%	60%	61%	55%	41%
Social networks (Facebook, YouTube, Instagram, Twitter etc.)	50%	57%	43%	46%	55%	47%	57%	49%	45%	31%	49%	57%	58%
Communication with friends , neighbors or colleagues	38%	40%	34%	37%	34%	33%	38%	36%	41%	34%	36%	41%	26%
Communication with family members	33%	34%	31%	30%	21%	28%	29%	36%	32%	27%	30%	34%	22%
National news TV channels (Channel 5, Channel 24, 112, NewsOne, ZIK, Priamyi, etc.)	26%	32%	33%	21%	25%	31%	29%	23%	28%	36%	29%	25%	24%
Web resources (online news outlets, news aggregators, etc.)	32%	21%	26%	21%	17%	22%	25%	19%	29%	16%	20%	30%	34%
Messengers (Telegram, WhatsApp, Viber, etc.)	18%	21%	11%	21%	28%	15%	20%	19%	24%	5%	18%	23%	28%
Public national or regional TV channels (UA:Pershyyi, UA:Culture)	18%	20%	7%	9%	4%	14%	10%	11%	13%	11%	13%	11%	16%
Regional TV channels	9%	13%	8%	11%	13%	11%	11%	11%	9%	10%	12%	8%	12%
News published by the public broadcaster on the Internet (suspipline.media website)	8%	3%	5%	13%	7%	6%	7%	6%	9%	2%	8%	8%	7%
Radio stations (Hit FM, Luks FM, Shanson, KiSS FM, etc.)	7%	9%	4%	8%	5%	6%	4%	6%	11%	4%	6%	8%	8%
Print media (newspapers/journals)	6%	12%	9%	5%	4%	9%	8%	7%	7%	5%	9%	7%	11%
Public radio stations (Ukrainian Radio, Radio Promin', Radio Culture)	8%	4%	3%	1%	2%	2%	3%	5%	7%	3%	4%	4%	5%

Source of data: all respondents, N = **2000**. Question: Where do you receive information on sociopolitical topics?

* accuracy of measurement = 0,05

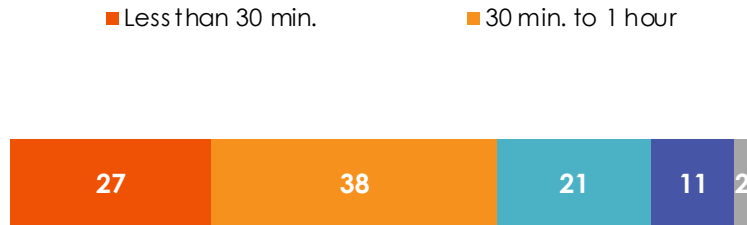
USE OF SOURCES IN THE LAST WEEK



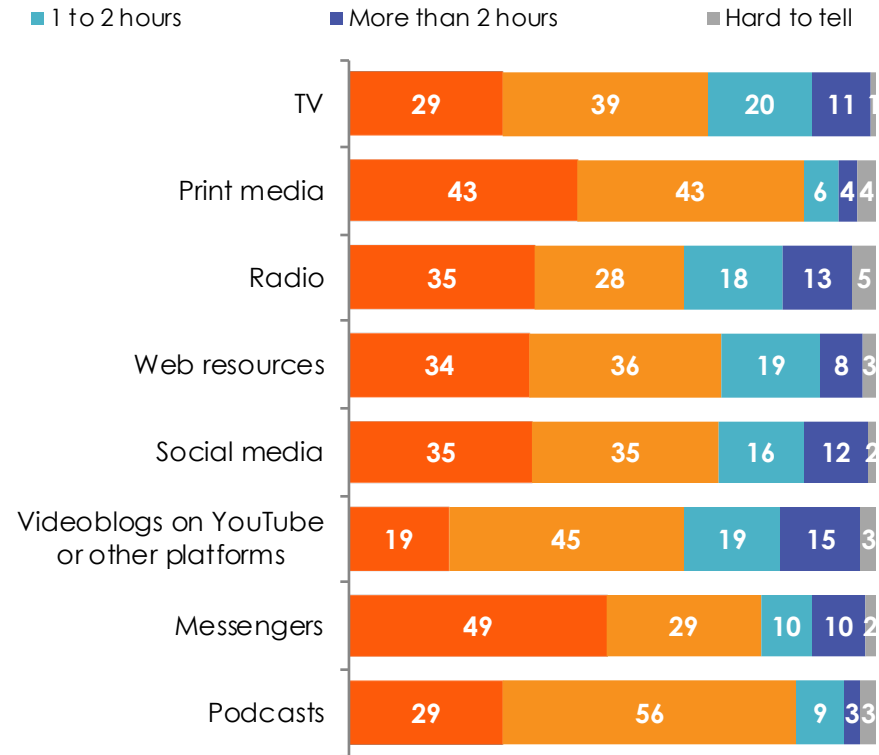
Source of data: all respondents, N= 2000. Question: What sources did you receive news from in the last week?
How often during last week have you referred to (media title) to consume news?

USE OF SOURCES DURING THE DAY

Duration of media consumption during the day, %

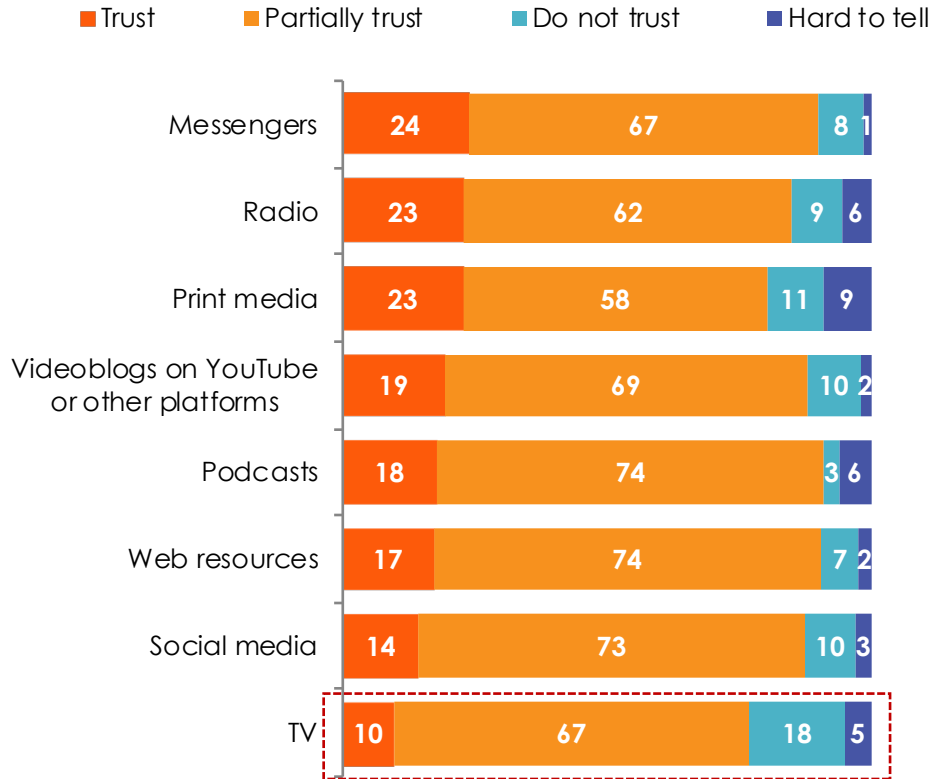


- Most often (38% of respondents) Ukrainians spend from **30 to 60 minutes** consuming news on a given day. 27% do that less than 30 minutes while 21% need between an hour and two. Finally, it takes another 11% 2 hours or more.



Source of data: all respondents, N= 2000. Question: *On average, how much time a day to you spend consuming news from different media?*

TRUST IN INFORMATION SOURCES



- Ukrainians treat most media with suspicion, trusting them only in part (67% to 74%).
- Messengers (24%), radio (23%) and print media (11%) are trusted the most.
- The least trusted type of media is television (10% of respondents trust it while 18% don't).

3. DETAILED FINDINGS OF THE SOCIOLOGICAL STUDY

3.4. The use of the Internet and digital competence

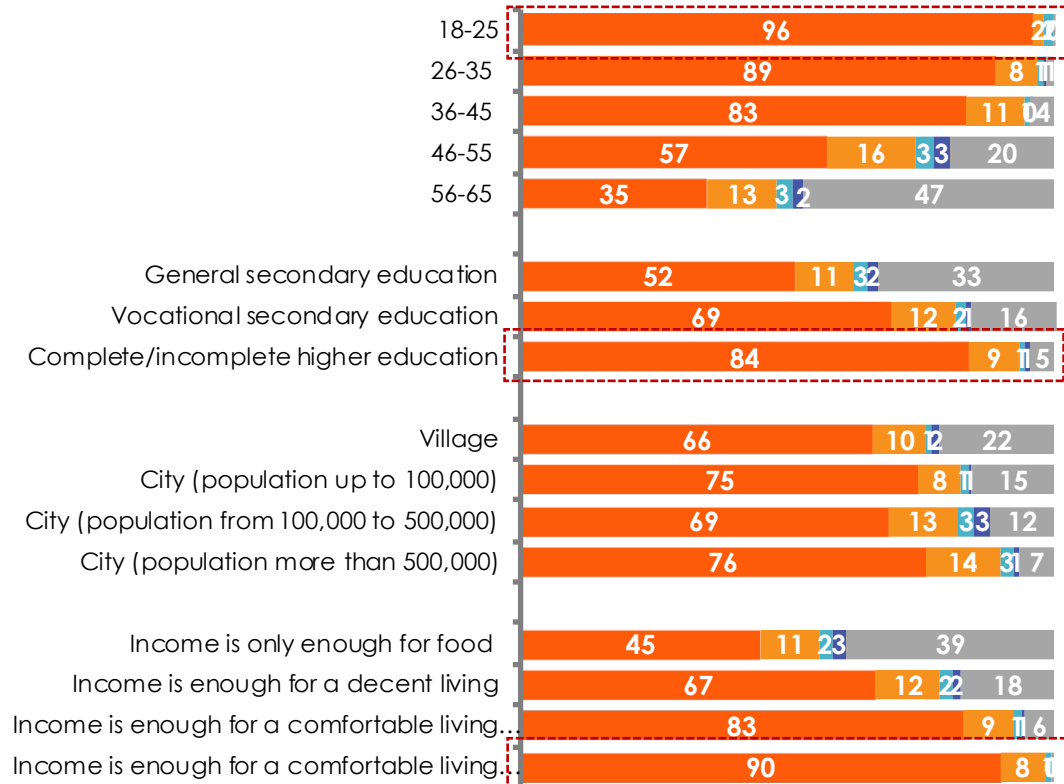
FREQUENCY OF THE INTERNET USE

Breakdown by age, educational status, population area type and income level*, %

■ Every day or almost every day
 ■ 2 to 5 times a week
 ■ Once a week
 ■ Less than once a week
 ■ Do not use the Internet at all



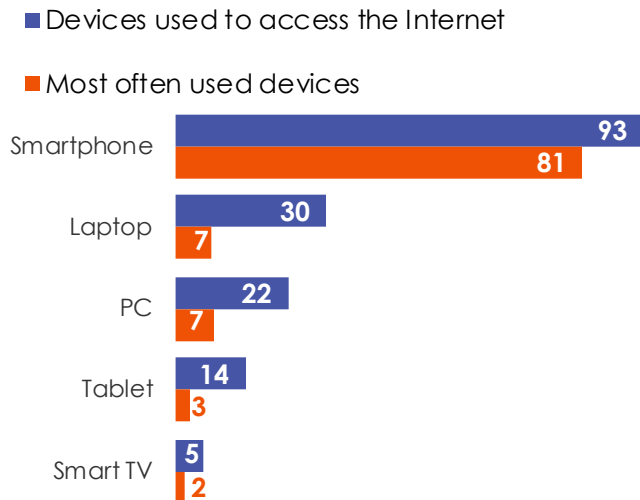
- Only 15% of Ukrainians do not use the Internet.
- 71% are active users that surf the net every day or almost every day; 11% do so 2 to 5 times a week while 3% - once a week or less often.



Source of data: all respondents, N= 2000; Question: *How often do you use the Internet?*

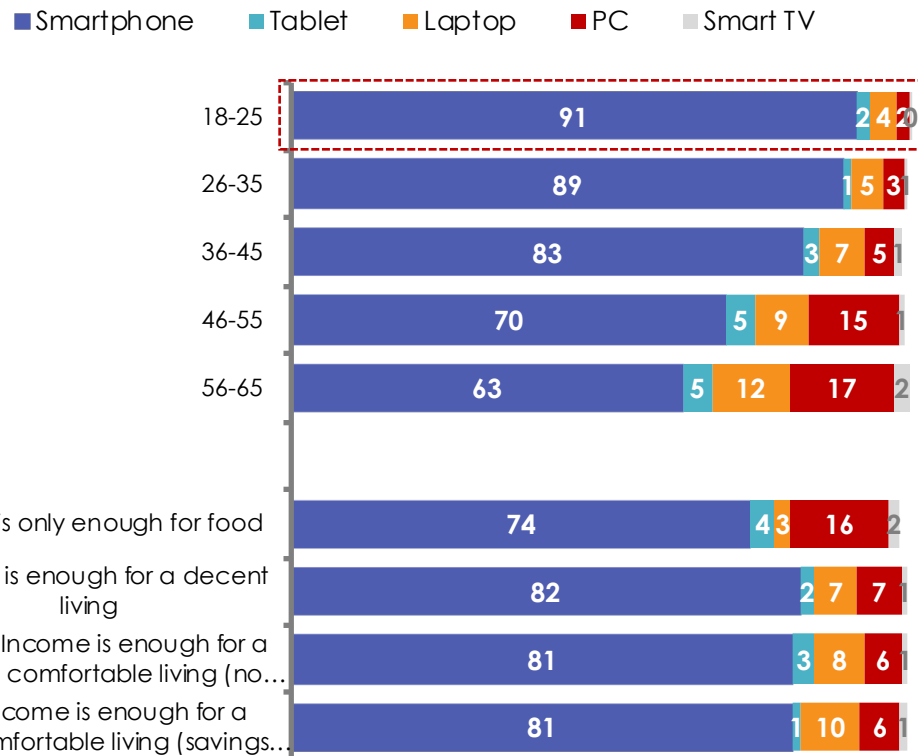
* accuracy of measurement = 0,05

DEVICES USED TO ACCESS THE INTERNET



- A **smartphone** is by far the most popular device for connecting to the Internet: 81% of respondents typically use one. The second most popular devices are a laptop and a desktop computer (7% each). 3% said they typically used a tablet, while another 2% reported using smart TV technology.

Breakdown by age and income level*, %



Source of data: respondents using the Internet, N= 1700. Question: Which devices do you use to access the Internet?

Which device do you use most often to access the Internet?

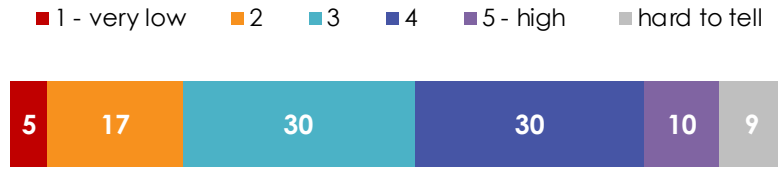
* accuracy of measurement = 0,05

MOTIVES FOR USING THE INTERNET



- Key motives for using the Internet include search for information (74%), consumption of news (61%), communication on social networks and messengers (60%), as well as watching video content (56%).
- Only 16% are proactive Internet users who either create and post their own content (publications, photos, videos, audio files) (15%) or keep their own pages/channels/websites for professional, commercial or reputational purposes (7%).

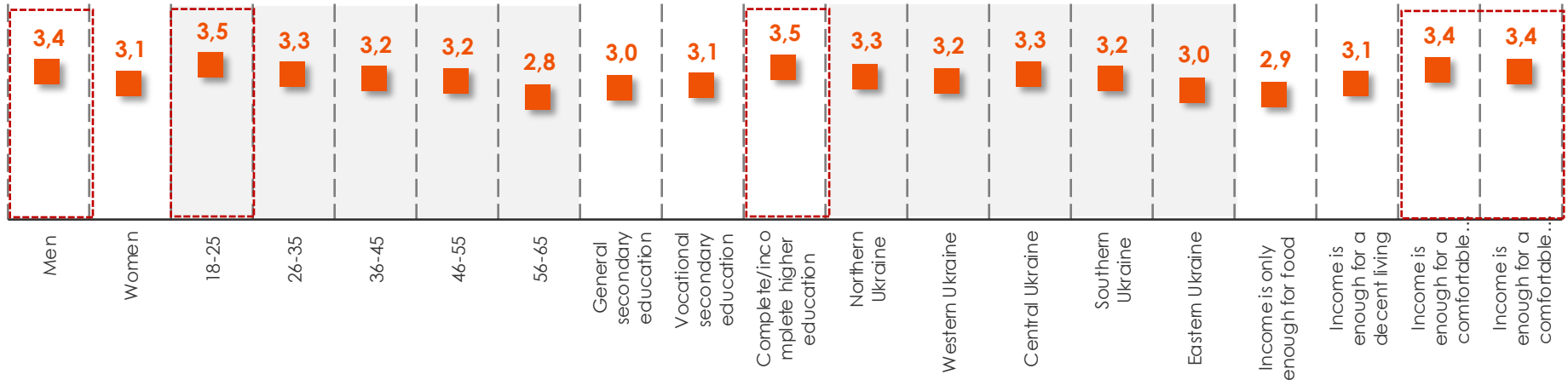
SELF-ASSESSMENT OF DIGITAL LITERACY LEVEL



The average score of digital literacy assessment on a 5-point scale
3,2

- **40%** of Internet users assess their level of digital literacy as above average, **30%** as average and **22%** consider their level to be below average or low.

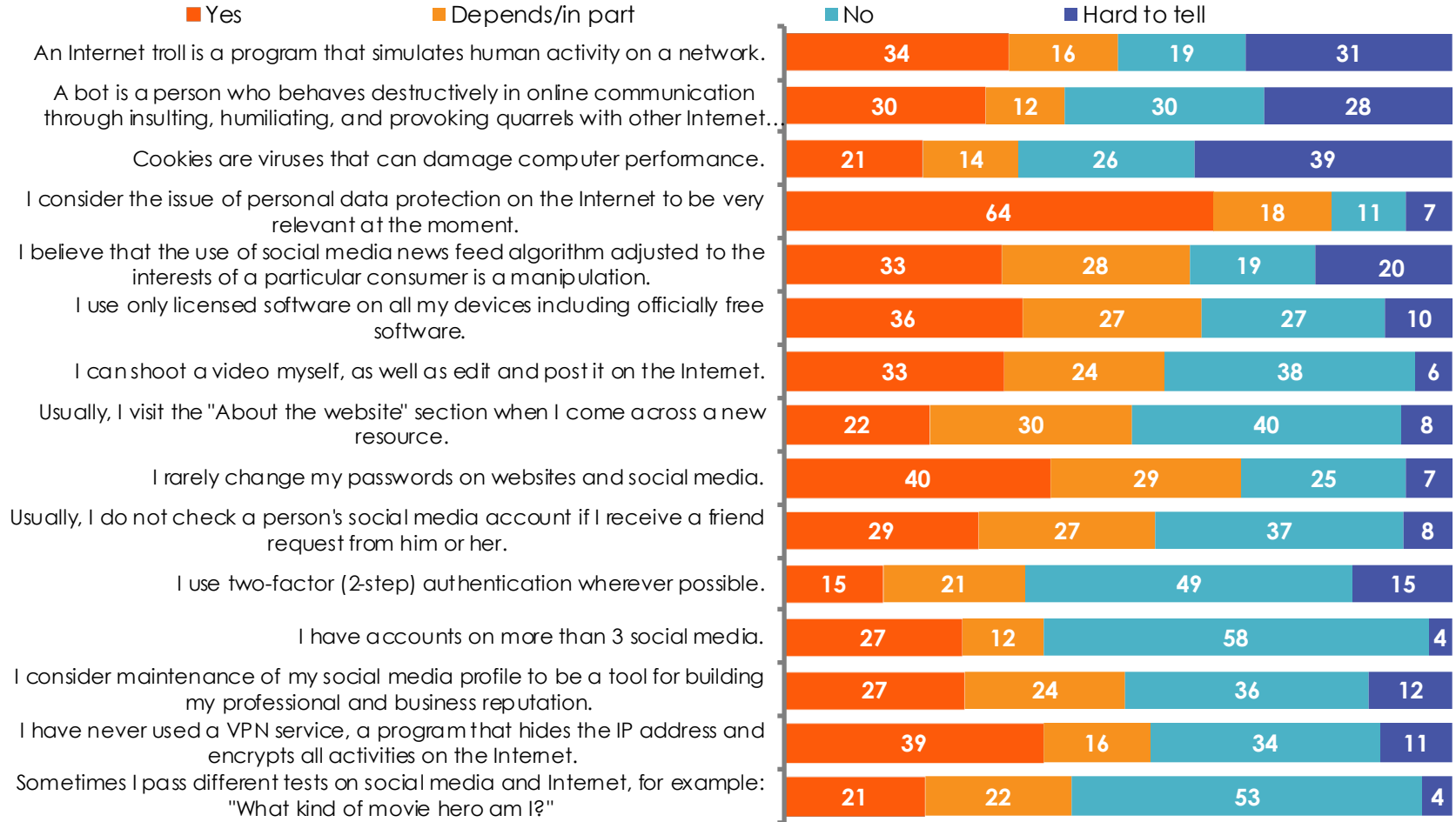
The average score of digital literacy*



Source of data: Internet users, N = **1700**. Question: How do you assess your digital literacy level on a 10-point scale, 1 being a very low level and 10 being a high level?

* accuracy of measurement = 0,05

DIGITAL LITERACY

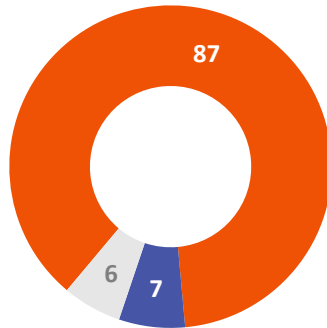


Source of data: Internet users, N = 1700. Question: *I am going to read out several statements, and you will say whether you agree with them or not.*

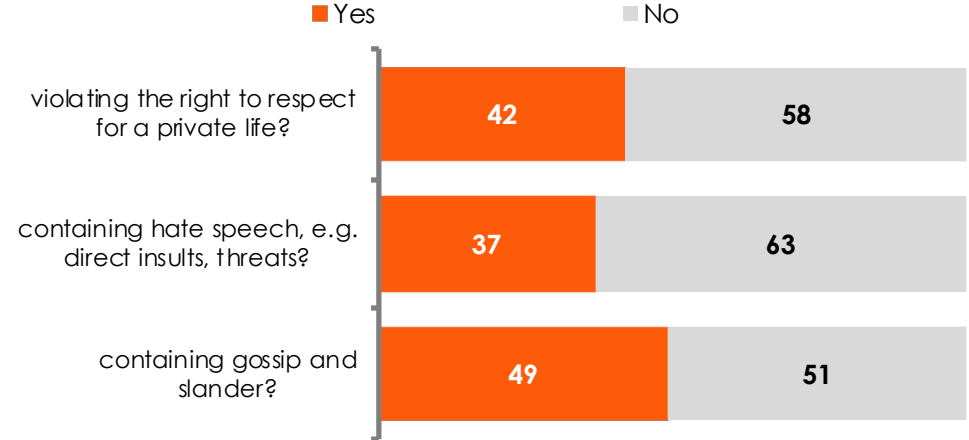
3. DETAILED FINDINGS OF THE SOCIOLOGICAL STUDY

3.5. Media literacy: trust in the media and sensitivity to distorted context

- Yes, he/she should - a journalist should adhere to professional ethical standards that guarantee the objectivity of the information he or she makes public
- No, he/she shouldn't - a journalist can publish any information without having to comply with any requirements
- Hard to tell



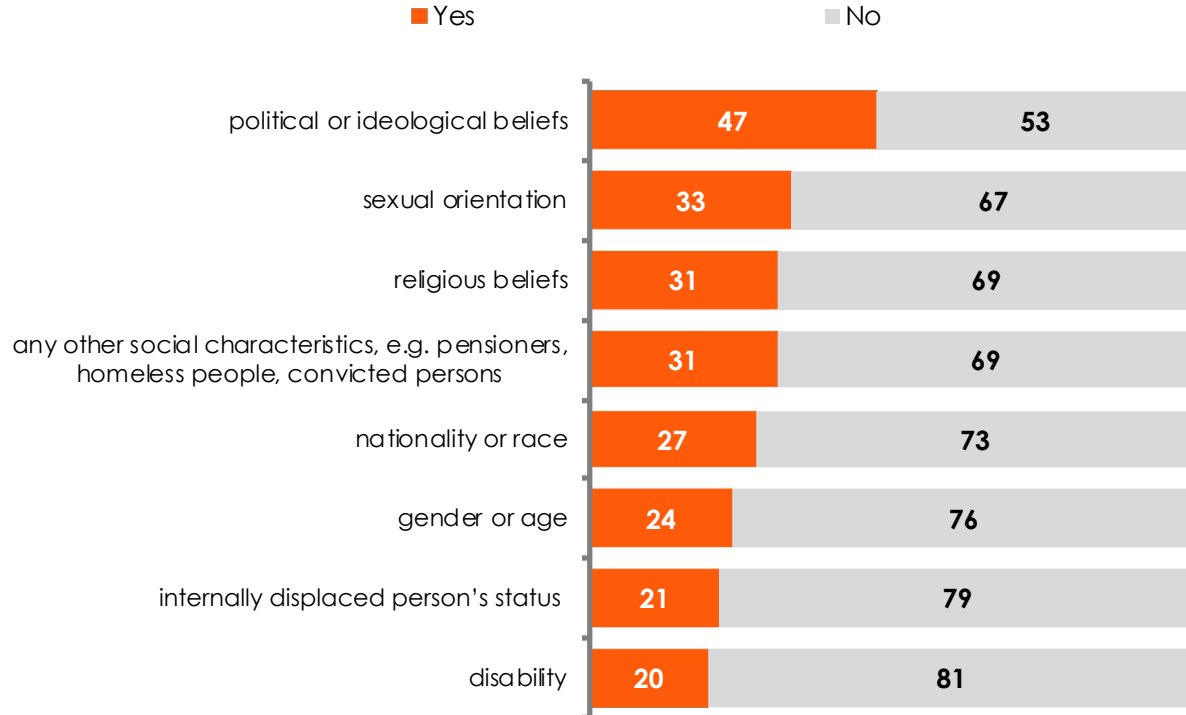
Have you come across the content.., %



- The vast majority of the audience (**87%**) believe that a journalist should adhere to professional ethical standards guaranteeing the objectivity of the information he or she makes public. **7%** of respondents have the opposite opinion that a journalist can publish any information without having to comply with any requirements; **6%** found it difficult to decide.
- The most common instances of violation of ethical standards in journalism faced by Ukrainians are gossip and slander (**49%**). **42%** of respondents noted violations of the right to respect for private life; **37%** recalled cases of hate speech, e.g. direct insults, threats.

Source of data: all respondents, N = **2000**; Question: *In your opinion, should the process of preparing and publishing news in the media meet certain ethical/quality requirements that every journalist should adhere to? Have you come across some materials in the media that ...*

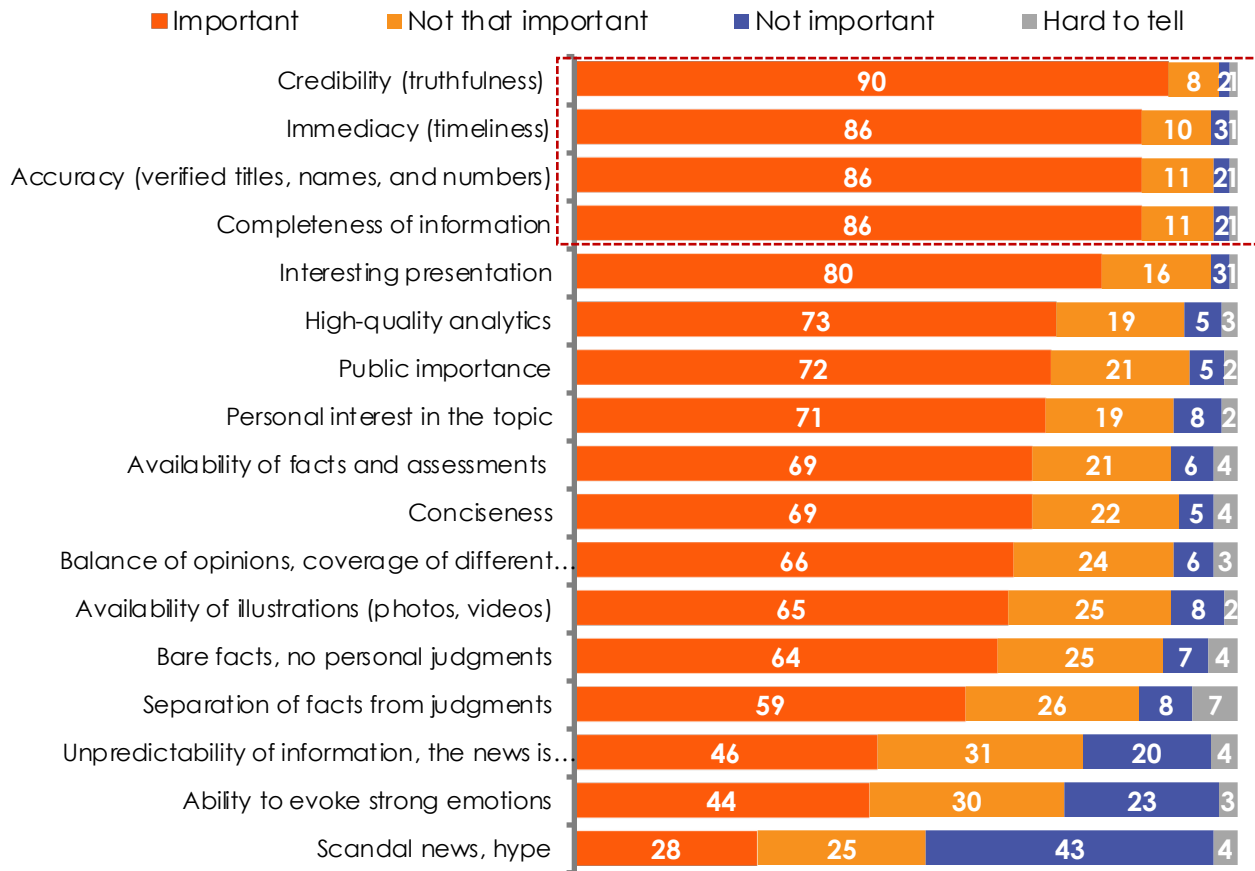
Have you come across any materials containing prejudice against people based on...?



- **42%** of the audience have never seen any materials stigmatizing or somehow discriminating certain social categories.
- **58%** of respondents encountered media messages promoting biased attitudes towards some people. Usually, it concerned their political or ideological beliefs (**47%**), sexual orientation (**33%**), religious beliefs (**31%**), various social characteristics (pensioners, homeless people, convicted persons, etc.), nationality or race (**27%**) or gender and age (**24%**).
- Every fifth respondent encountered prejudice against internally displaced persons (**21%**) and persons with disabilities (**20%**).

Source of data: all respondents, N = **2000**; Question: *Have you ever come across any materials in the media expressing prejudice or negative attitude against people... (discrimination)?*

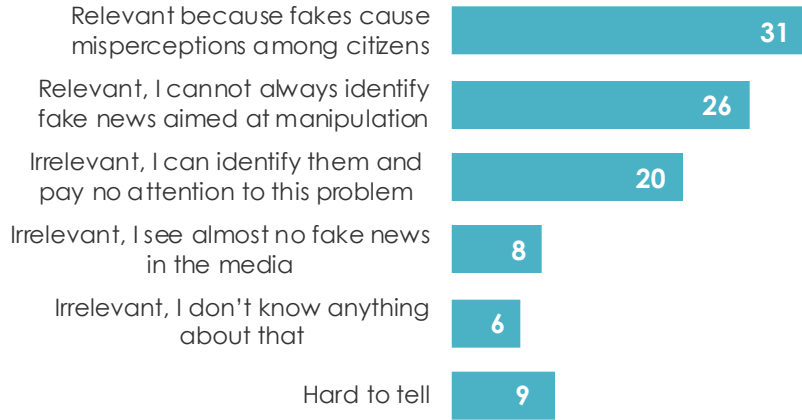
REQUIREMENTS TO NEWS



- The main requirements to news include:
 - ✓ Credibility (**90%**),
 - ✓ Immediacy (**86%**),
 - ✓ Accuracy (**86%**),
 - ✓ Completeness of information (**86%**)
 - ✓ and interesting presentation of the material (**80%**).

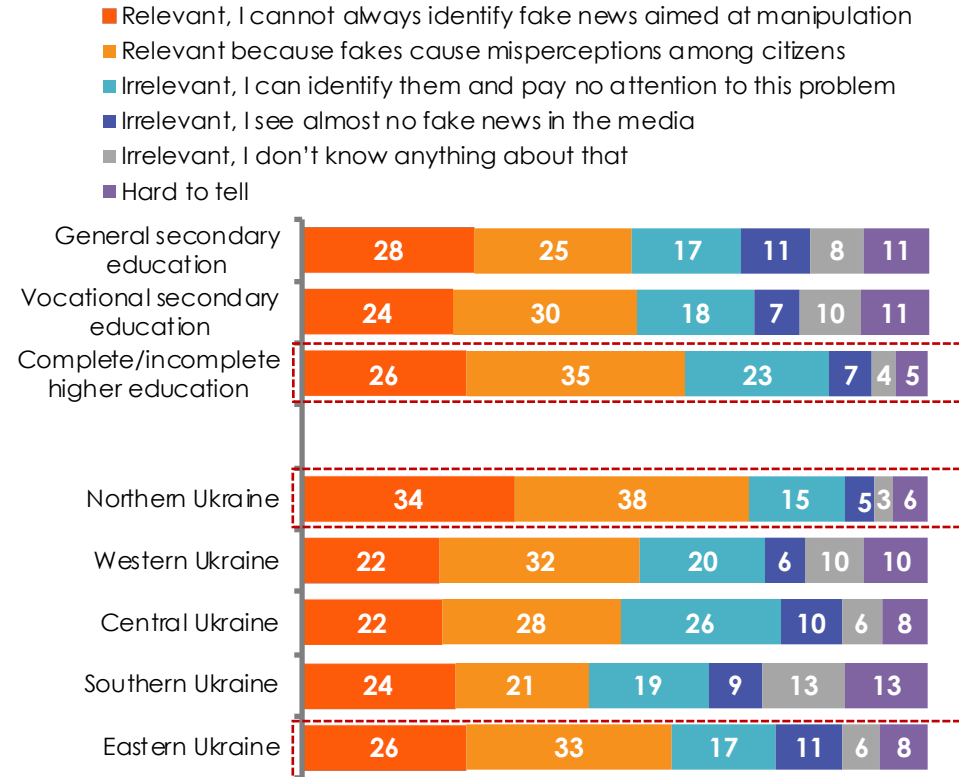
Source of data: all respondents, N= **2000**. Question: *Have you ever come across any materials in the media expressing prejudice or negative attitude against people... (discrimination)?*

DISINFORMATION IN THE MEDIA: RELEVANCE OF THE PROBLEM



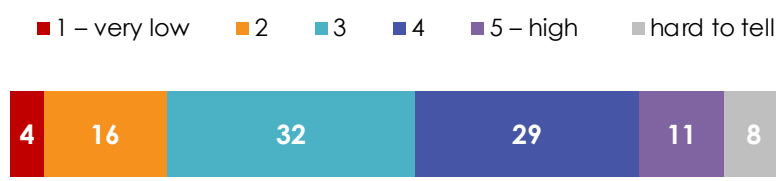
- The problem of fake news in the media is relevant for **57%** of the Ukrainian audience; **28%** of respondents consider it not relevant; **6%** don't know anything about fake news, and **9%** found it hard to tell.

Breakdown by educational status and region*, %



Source of data: all respondents, N = **2000**. Question: *There is a lot of talk about fake news spread by media these days. How relevant is this problem for you?*

DISINFORMATION IN THE MEDIA: SENSITIVITY TO FAKES

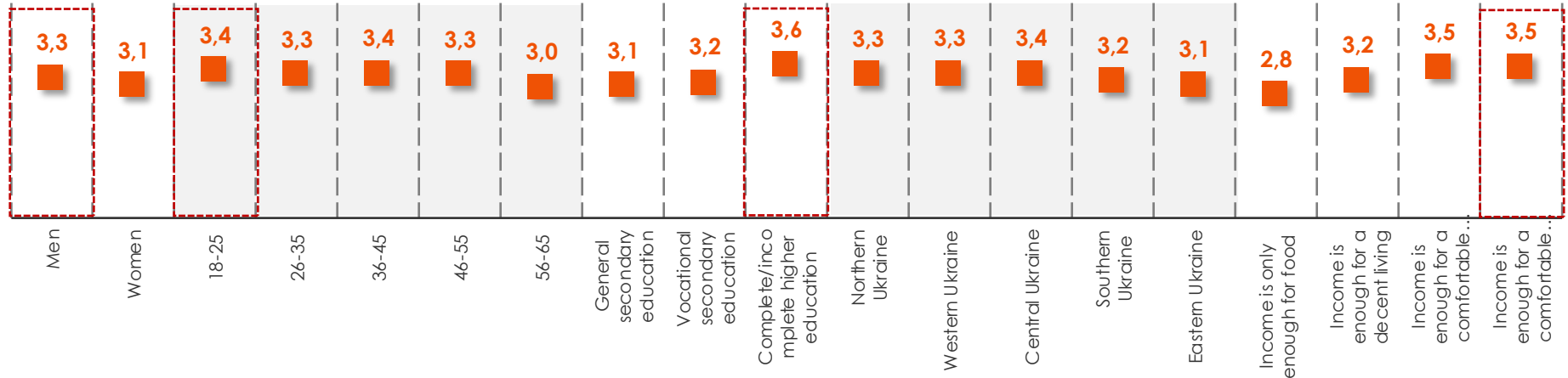


The average score of personal sensitivity to disinformation on a 5-point scale

3,3

- **40%** of the audience assess their level of sensitivity to disinformation as above average or high, **32%** as average and **20%** as below average or low.

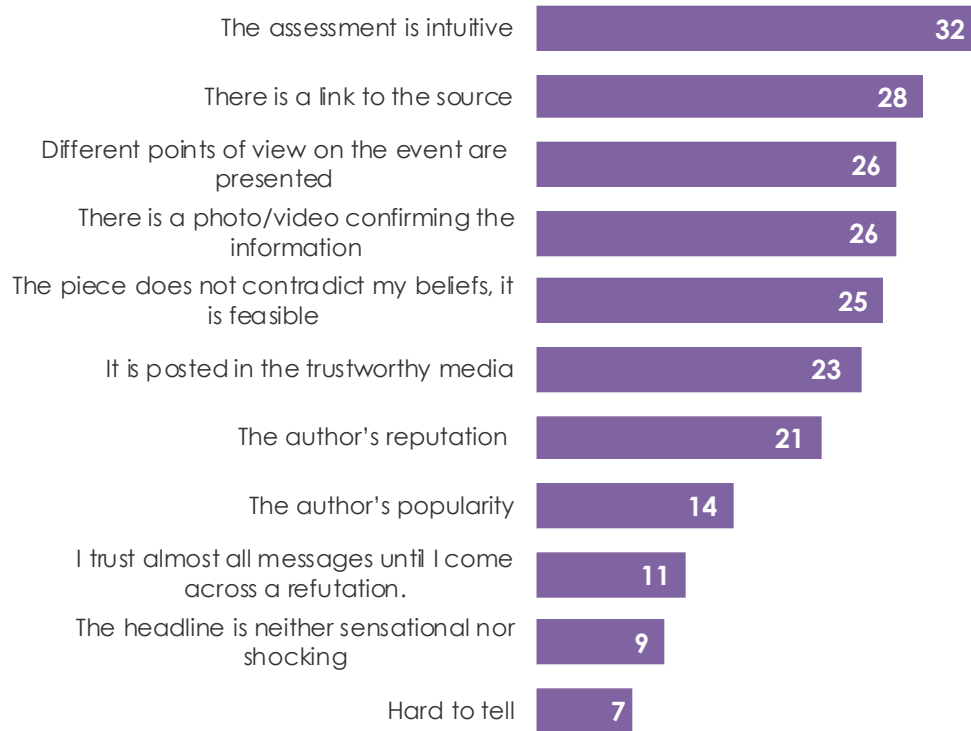
The average score of personal sensitivity to fakes*



Source of data: all respondents, N= **2000**. Question: *How do you assess your media literacy level on a 10-point scale, 1 being a very low level and 10 being a high level?*

* accuracy of measurement = 0,05

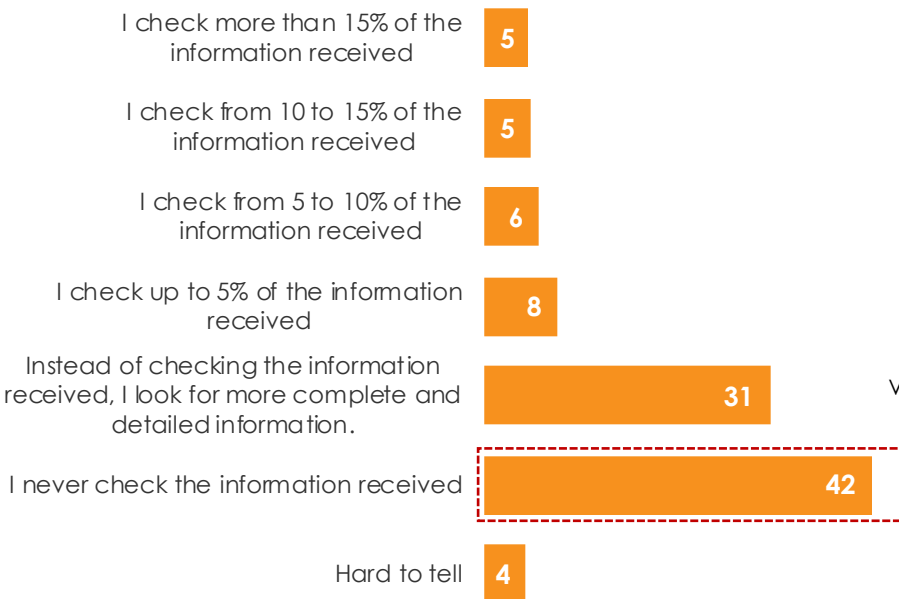
CRITERIA OF CREDIBLE NEWS



- The most significant part of the audience (**32%**) determine the credibility of the news intuitively; **28%** of respondents are looking for links to the source of information; **26%** of them believe that an important indicator is the representation of different points of view or presence of a photo/video confirming the information.
- Every fourth respondent (**25%**) tends to trust the news if it does not contradict his or her beliefs and is feasible;
- For **23%**, the reliability of the news depends on the credibility of the media, and **21%** of respondents take into account the good reputation or popularity of the author (**14%**).
- **11%** trust almost all messages until they come across a refutation.

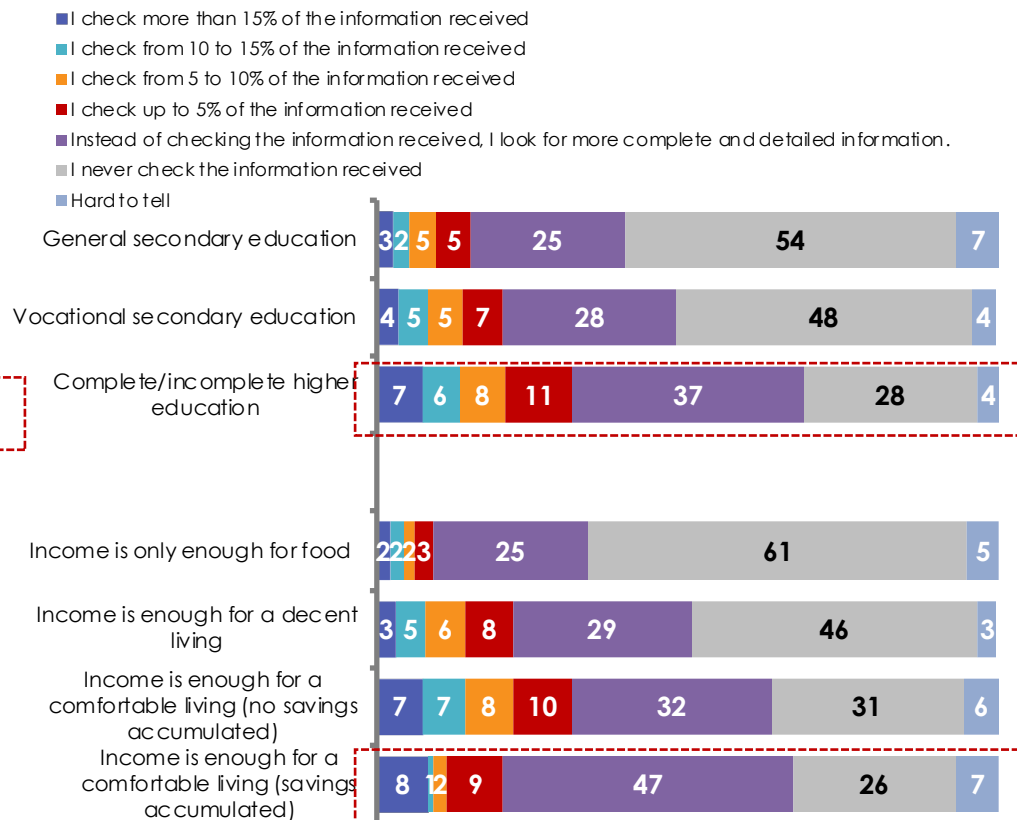
Source of data: all respondents, N = **2000**. Question: *How do you determine the credibility of the news? Please select 3 main criteria:*

VERIFICATION OF INFORMATION



- **42%** of Ukrainians never check information for accuracy; **31%** of respondents do not check, but rather look for more complete and detailed information; only a quarter of the audience check media content (**24%**)

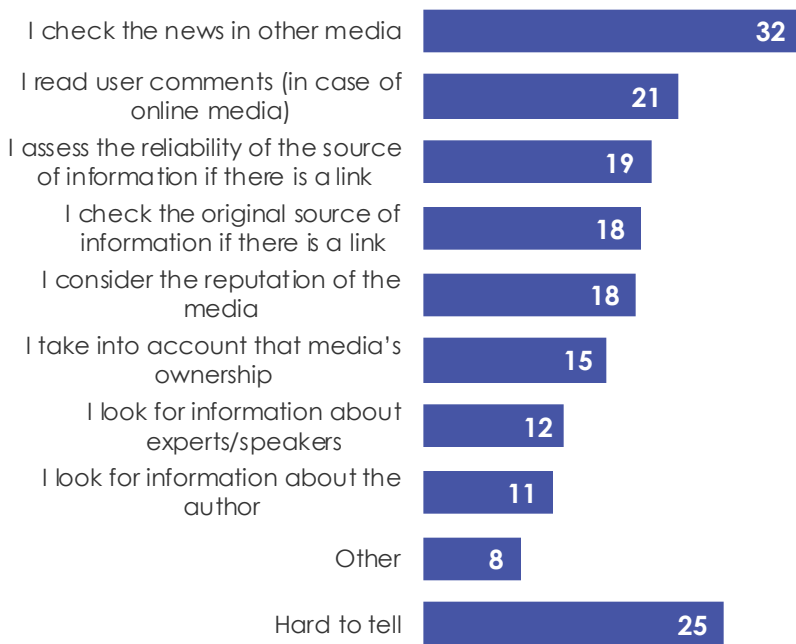
Breakdown by educational status and income level*, %



Source of data: all respondents, N= 2000. Question: Do you additionally check the information received from media for accuracy?

* accuracy of measurement = 0,05

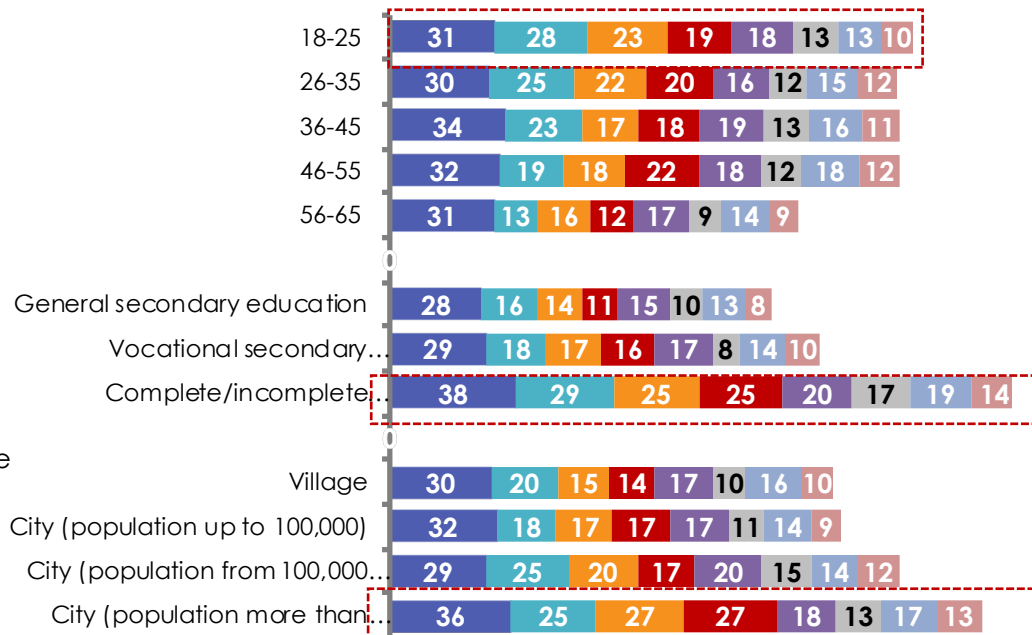
VERIFICATION OF INFORMATION



- Among the main practices of information verification the following were named: checking the news in other media (**32%**), reading user comments (in case of online media) (**21%**), assessing the reliability of the source if there is a link (**18%**), as well as reputation of the media (**18%**).

Breakdown by age, educational status and type of population area

- I check the news in other media*%
- I read user comments (in case of online media)
- I assess the reliability of the source of information if there is a link
- I check the primary source of information if there is a link
- I consider the reputation of the media
- I am looking for information about experts/speakers
- I take into account the media ownership
- I am looking for information about the author



Source of data: those who check the information for accuracy, N = 1001. Question: *How exactly do you check the accuracy of information?*

* accuracy of measurement = 0,05

RELIABLE SOURCES OF INFORMATION



- Most popular reliable sources of information include interviews with witnesses of a given event (**40%**) and opinions of well-known experts (33%).
- Equal shares of respondents (**19-20%**) consider links to information from Ukraine's authorities, analytics and statements of a non-governmental organization, official press releases published on governmental websites, as well as interviews with officials to be reliable.

Source of data: all respondents, N = **2000**. Question: *Which of these sources of information do you consider reliable? Select all that apply.*

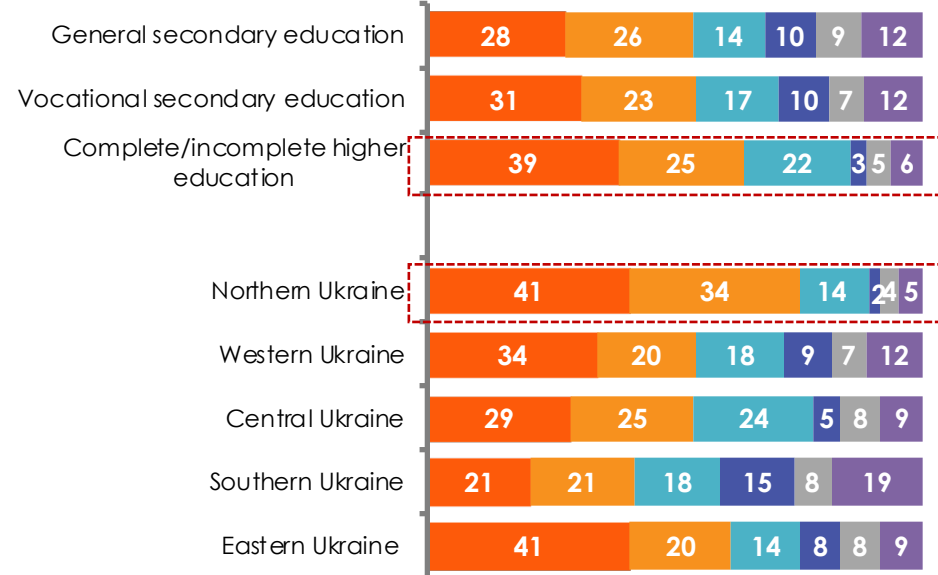
MANIPULATION IN THE MEDIA RELEVANCE OF THE PROBLEM



- The problem of manipulation in media is relevant for **57%** of the Ukrainian audience, while **25%** consider it irrelevant and **8%** have never heard about manipulative messages. Another **10%** found it hard to tell.

Breakdown by educational status and region*, %

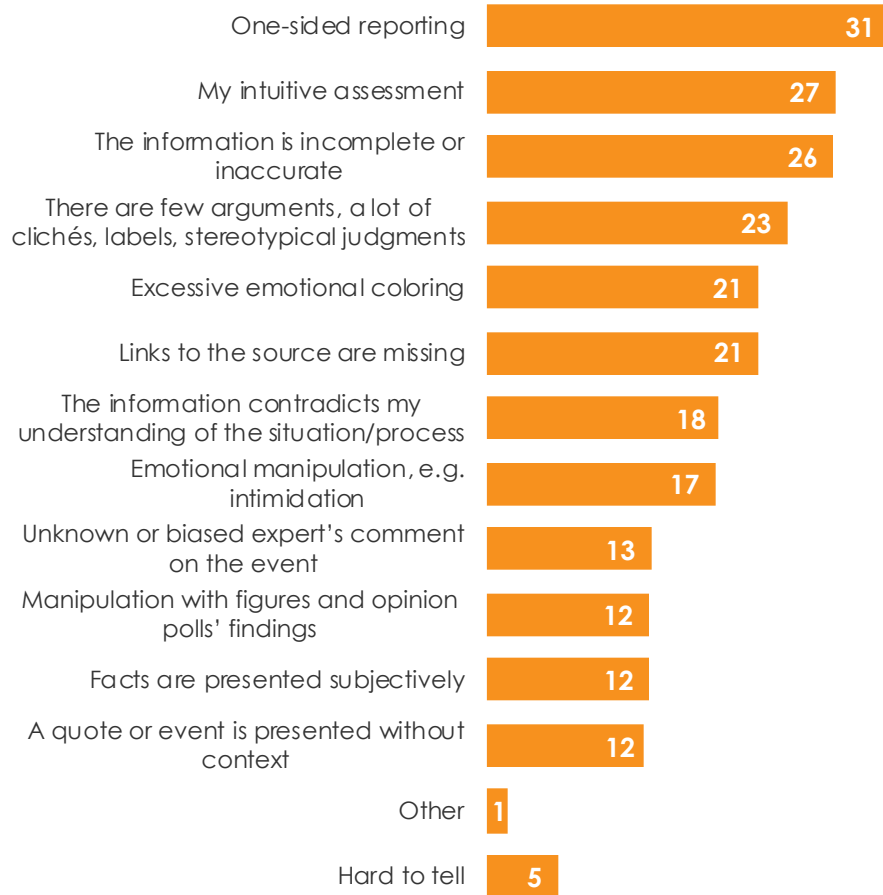
- Relevant because manipulations cause misperceptions among citizens
- Relevant, I cannot always identify manipulative techniques used by media
- Irrelevant, I can identify them and pay no attention to this problem
- Irrelevant, I don't know anything about that



Source of data: all respondents, N=2000. Question: *It is reported that media can influence public opinion not only by the means of disinformation but also by using manipulations and distorting the information. How relevant is this problem for you?*

* accuracy of measurement = 0,05

INDICATORS OF MANIPULATION

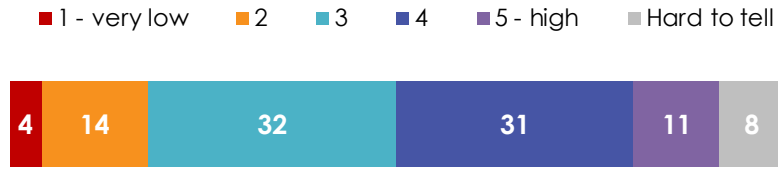


- **27%** of the audience decide if a message is manipulative intuitively; **31%** suspect manipulation in case of one-sided reporting; **26%** consider incomplete or inaccurate information to be an important indicator.
- Almost every fourth respondent (**23%**) tends to distrust a piece of news if it contains few arguments, a lot of clichés, labels and stereotypical judgments;
- **21%** of respondents said that excessive emotional coloring and lack of source links would cause suspicion of the authors' desire to manipulate perception of the audience;
- Such indicators of manipulative materials as emotional manipulation, intimidation (**17%**), unknown or biased experts (**13%**), manipulation of figures and opinion polls' findings (**12%**), subjective presentation of facts (**12%**), as well as presentation of quotes without context (**12%**) were mentioned less often.

Source of data: all respondents, N = **2000**. Question: *How do you determine if a message/piece of news is manipulative? Please select 3 main criteria:*

MANIPULATION IN THE MEDIA

SENSITIVITY TO MANIPULATION

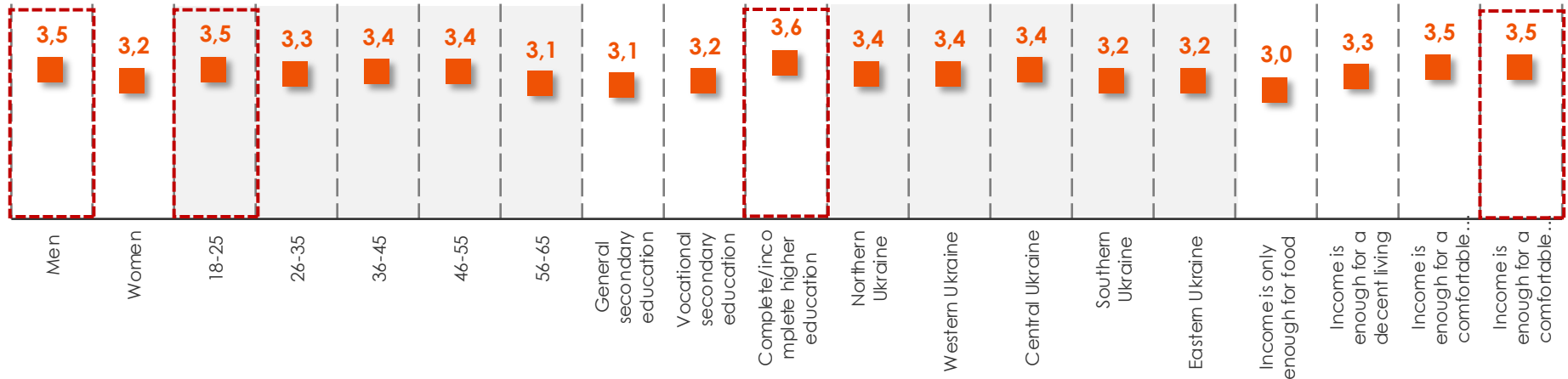


The average score of personal sensitivity to manipulation on a 5-point scale

3,3

- **42%** of the audience assess their level of sensitivity to manipulation as above average or high, **32%** as average and **28%** consider their level to be below average or low.

The average score of personal sensitivity to manipulation*



Source of data: all respondents, N = **2000**. Question: How do you assess your sensitivity to manipulations in media on a 10-point scale, 1 meaning 'usually, I do not feel when they try to manipulate my opinion' and 10 meaning 'I almost always feel any attempts of manipulation'.

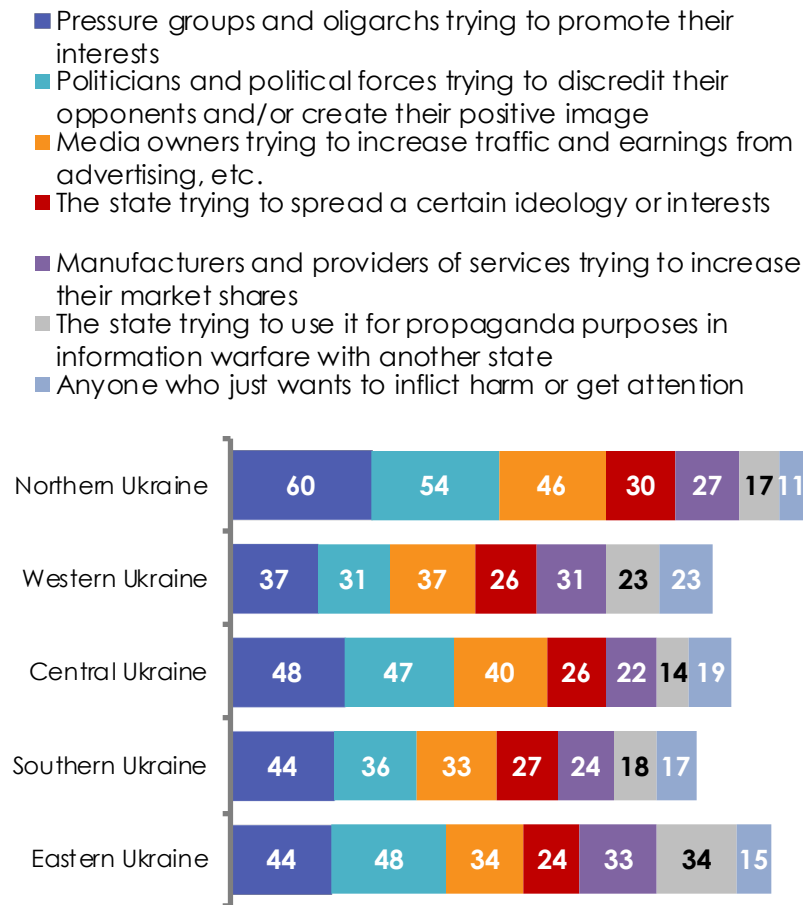
* accuracy of measurement = 0,05

WHO IS RESPONSIBLE FOR MISREPRESENTATION IN THE MEDIA AND WHAT IS THE PURPOSE?



- According to the audience, media content is often distorted in the interests of business and political elites, e.g. pressure groups, oligarchs (**47%**), politicians and political forces to create their positive image (**43%**).
- Among those interested in fake/manipulative messages, the state (**47%**), certain media owners (**39%**), manufacturers, and services providers (**27%**) were named as well.

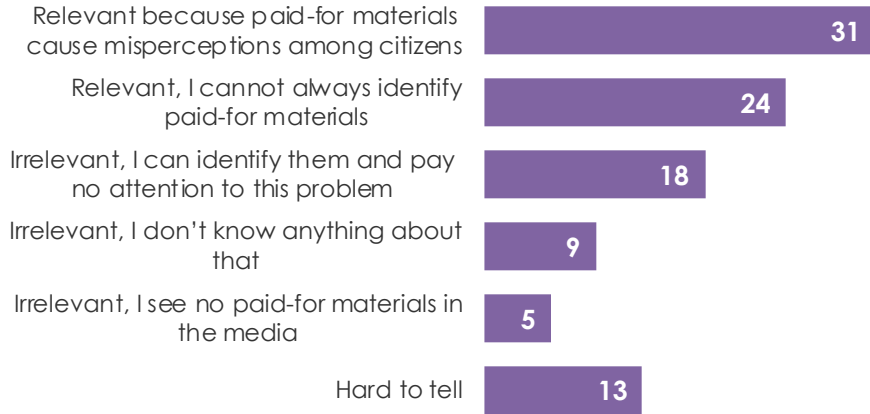
Breakdown by region*, %



Source of data: all respondents, N= **2000**. Question: *In your opinion, who is responsible for manipulation of information and spreading fake news, and what is the purpose? Select 3 main sources of information misrepresentation.*

* accuracy of measurement = 0,05

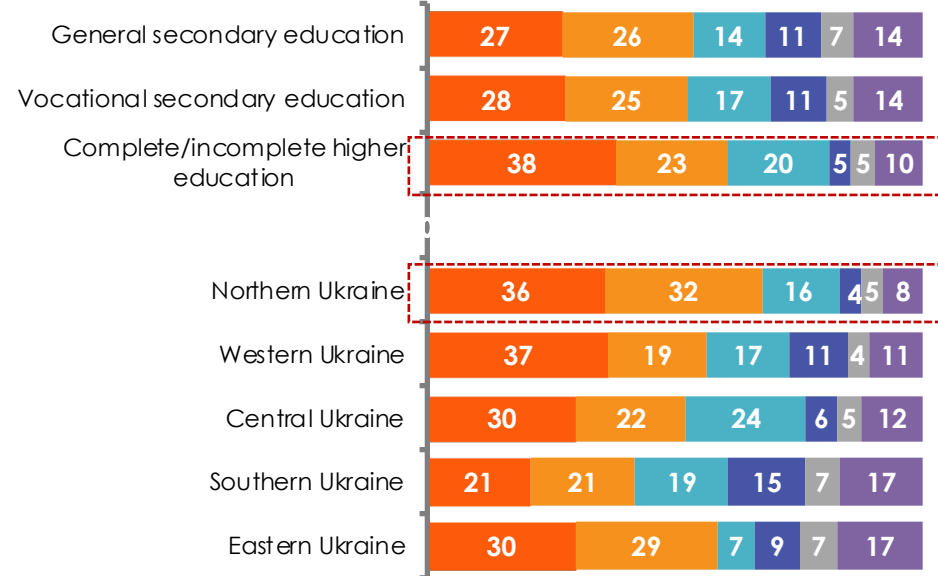
PAID-FOR MATERIALS IN THE MEDIA: RELEVANCE OF THE PROBLEM



- The problem of paid-for materials in media is relevant for **55%** of the Ukrainian audience; **23%** of respondents consider it irrelevant; **9%** don't know anything about "hit stories", and **13%** found it hard to tell.

Breakdown by educational status and region*, %

- Relevant because paid-for materials cause misperceptions among citizens
- Relevant, I cannot always identify paid-for materials
- Irrelevant, I can identify them and pay no attention to this problem
- Irrelevant, I don't know anything about that
- Irrelevant, I see no paid-for materials in the media
- Hard to tell



Source of data: all respondents, N= **2000**. Question: *It is known that media can publish paid-for materials that are hidden advertising under the guise of regular materials. How relevant is this problem for you?*

* accuracy of measurement = 0,05

PAID-FOR MATERIALS IN THE MEDIA: ABILITY TO IDENTIFY "HIT PIECES"

■ 1 - very low level ■ 2 ■ 3 ■ 4 ■ 5 - high level ■ hard to tell

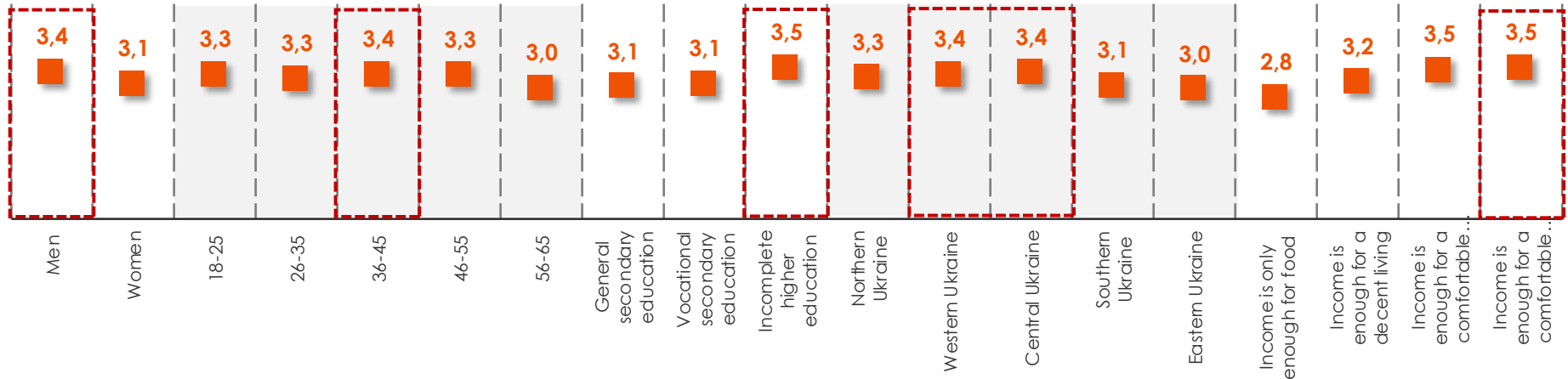


The average score of self-assessment of the ability to identify paid-for materials on a 5-point scale

3,3

- **38%** of respondents determined their level of ability to identify paid-for materials to be average or high; **31%** believe it to be average and **19%** think it is below average or low.

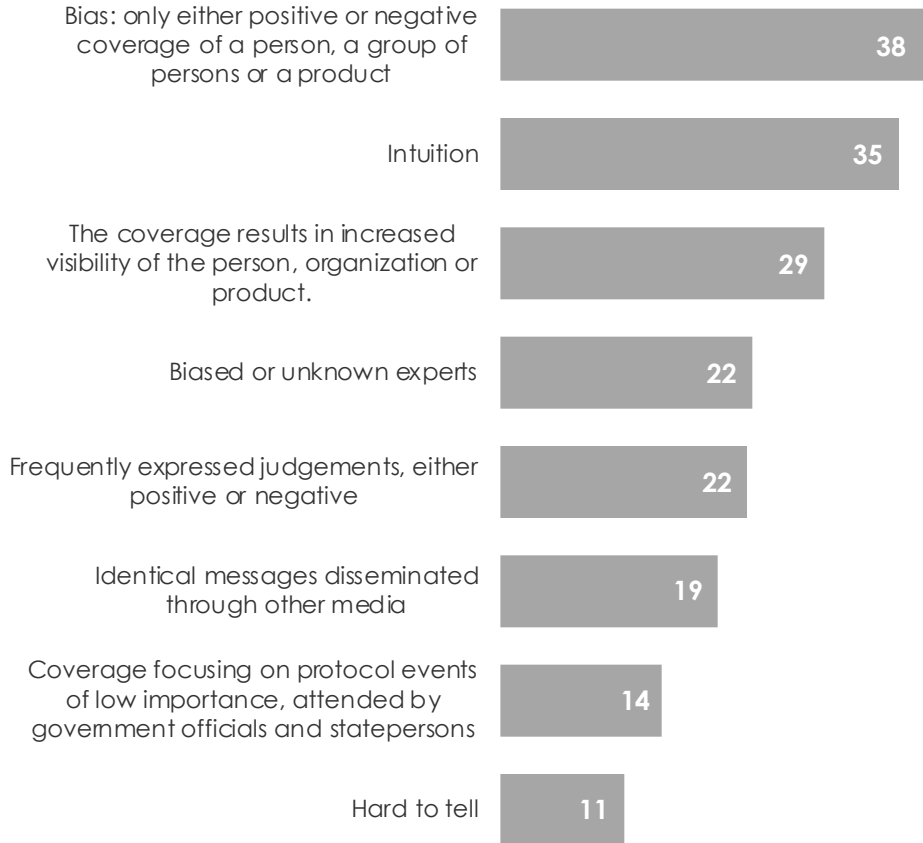
The average score in self-assessment of the ability to identify paid-for materials*



Source of data: all respondents, N= **2000**; Question: *How do you rate your ability to detect paid-for materials in the media? Your response should be a number on a scale from 1 to 10, 1 meaning general inability to detect content of this kind, and 10 meaning that you are able to detect it immediately.*

* Accuracy of measurement = 0,05.

INDICATORS OF PAID-FOR MATERIALS



- 35% of the audience rely on intuition to assess whether a material is paid-for. 38% suspect a material to be a “hit piece” if it covers only positive or negative aspects of a person, a group of people or a product, while 29% consider it an important marker if a piece contributes to the recognizability of a person, organization or product.
- Respondents also pay attention to the presence of assessments (either positive or negative), as well as that of comments from biased or unknown experts (22% each).
- The audience suspects a material to be paid-for if identical messages appear in other media (19%), as well as if it covers protocol events that are attended by officials but have no public significance (14%).

Source of data : all respondents, N= **2000**; Question: *What indicators do you use to detect paid-for materials? Please choose three indicators*

SELF-ASSESSMENT OF MEDIA LITERACY

■ 1 - very low level ■ 2 ■ 3 ■ 4 ■ 5 - high level ■ Hard to tell

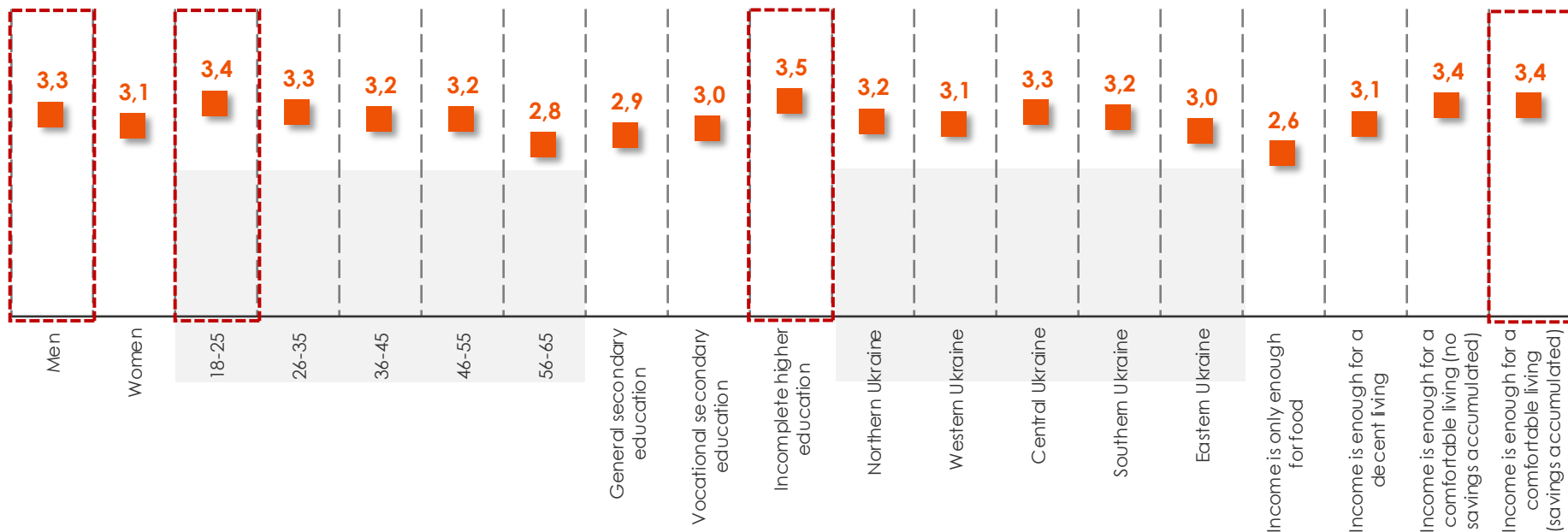


The average score in self-assessment of media literacy on a 5-point scale

3,1

- **36%** of the respondents characterize their level of media literacy as above average or high; **32%** consider it to be average and **23%** believe their level is below average or low.

The average score in self-assessment of media literacy*

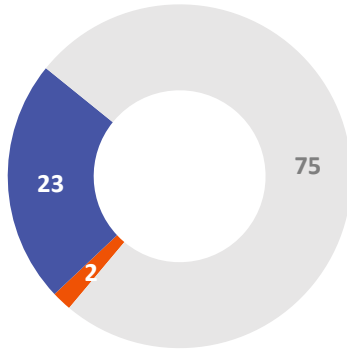


Source of data: all respondents, N= **2000**; The question: *How do you characterize your media literacy level? Please rate it from 1 to 10, 1 being very low and 10 being high level.*

* Accuracy of measurement = 0,05.

AWARENESS OF AVAILABLE MEDIA LITERACY TRAINING

- Aware and participated in training
- Aware, but never participated in training
- Unaware, never heard of it



- Three out of four Ukrainians (**75%**) have never heard of any media literacy training or education; **23%** are aware of available means of improving media literacy, and **2%** participated in the said training events.

Attendance of trainings by other people that respondents are acquainted with, %



- **48%** of the respondents that were aware of the available trainings/seminars or participated in them, noted that some of their acquaintances, friends or relatives also attended lectures on media literacy. **52%** could not say for sure.

3. DETAILED FINDINGS OF THE SOCIOLOGICAL STUDY

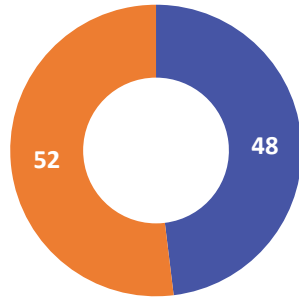
3.6. Sociodemographic profile of respondents

SOCIODEMOGRAPHIC PROFILE OF RESPONDENTS



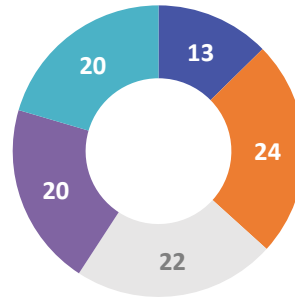
Gender, %

■ Men ■ Women

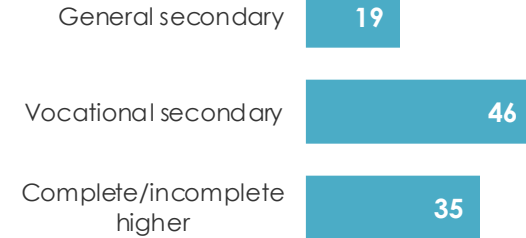


Age, %

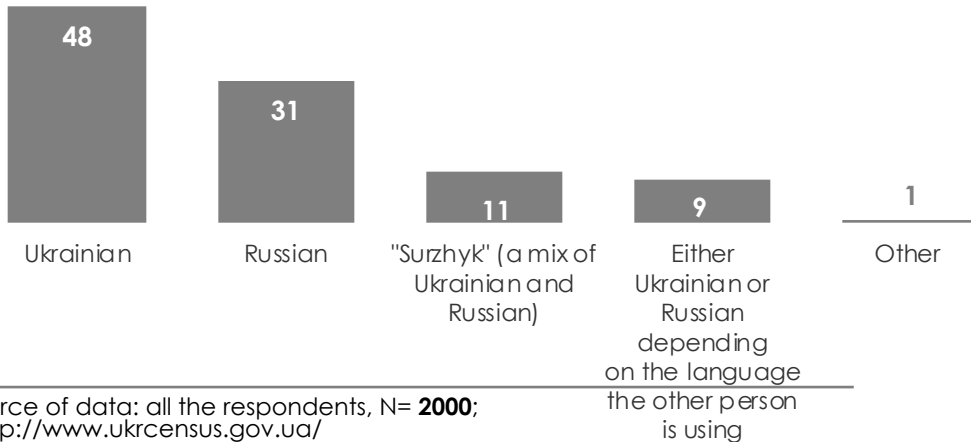
■ 18-25 ■ 26-35 ■ 36-45 ■ 46-55 ■ 56-65



Education, %



Language spoken in family, %

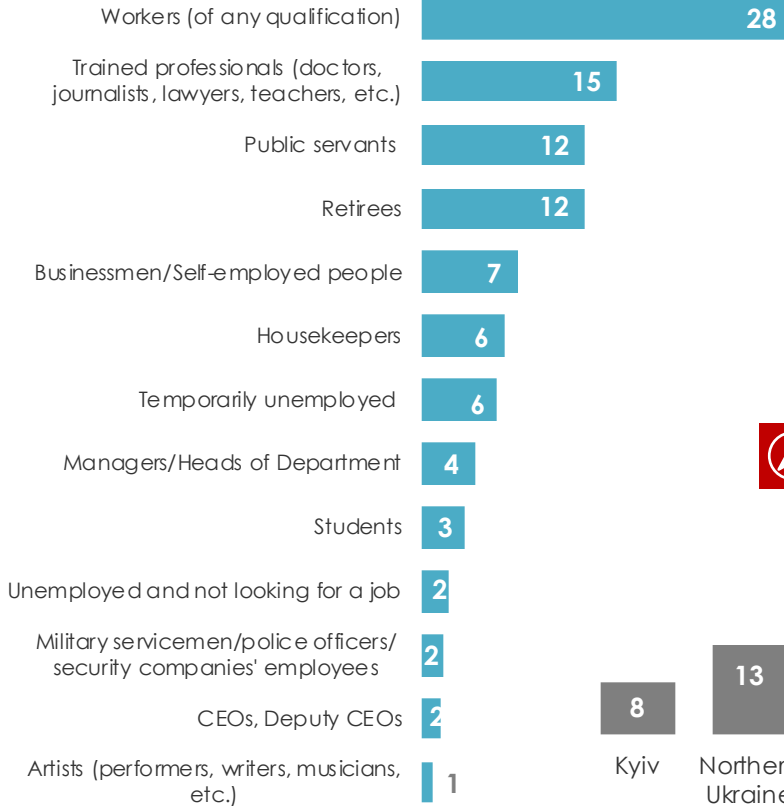


- Sociodemographic characteristics of respondents match the real breakdown of the adult population of Ukraine according to the data provided by the State Statistics Service*

SOCIODEMOGRAPHIC PROFILE OF RESPONDENTS

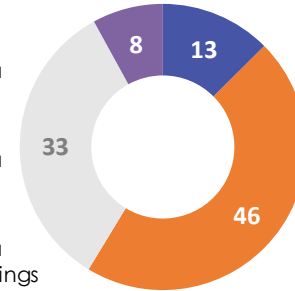


Profession, %

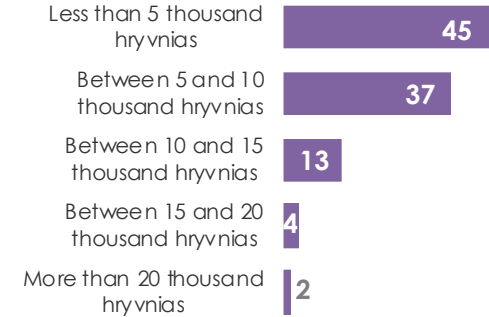


Family income self-assessment, %

- Income is only enough for food
- Income is enough for a decent living
- Income is enough for a comfortable living (no savings accumulated)
- Income is enough for a comfortable living (savings accumulated)



Average income per family member, %



Location, %



Type of population area, %

