

МЕДІАКОМУНІКАЦІЇ

УДК 070:316.772

<https://doi.org/10.28925/2524-2644.2024.181>

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УКРАЇНСЬКИЙ МЕДІАЛАНДШАФТ ПІД ЧАС ВІЙНИ (2022–2024 рр.): ТРАНСФОРМАЦІЯ, РЕАКЦІЯ НА ВІЙНУ, ДИНАМІКА МЕДІАСПОЖИВАННЯ

UKRAINIAN MEDIALANDSCAPE IN THE TIME OF WAR (2022–2024): TRANSFORMATION, RESPONSE TO THE WAR, DYNAMICS OF MEDIA CONSUMPTION

АНОТАЦІЯ. У статті досліджується вплив російсько-української гібридної війни на український медіа-ландшафт та медіаспоживання. Для виявлення кількісних та якісних змін використовувалася змішана методологія дослідження. Незважаючи на втрати телеканалів, радіостанцій і друкованих ЗМК, більшість медіакорпорацій не припинили мовлення поблизу зони бойових дій і розпочали з початком війни спільні ініціативи. Гуманітарна діяльність ЗМК була зосереджена на краудсорсингу щодо збору ресурсів та інформаційній підтримці для переселенців, вразливих категорій населення та військових підрозділів. Автори зазначають, що під гуманітарних медійних кампаній щодо війни в Україні припав на перші кілька місяців війни. Більшість ініціатив мали тривалий термін дії. Фокус краудсорсингових і фандрейзингових кампаній, організованих медіа, в динаміці переміщався насамперед від людей із зони бойових дій, які втратили роботу, домівку та рідних у 2022–2023 роках, на підтримку армії та зміцнення оборони країни у 2023–2024 роках. Акцентовано тенденцію щодо збільшення споживання новин через соціальні медіа та збереження високої уваги громадян до офіційних джерел, таких як Президент України та Збройні сили. ЗМК відіграли вирішальну роль у національній єдності, приділяючи велику увагу корпоративній соціальній відповідальності. Дослідження споживання медіа виявили дезінформаційні нарративи та стратегії, особливості звичок споживання новин під час війни.

Автори наголошують, що медіа мають потужний вплив на формування поглядів і переконань людей. Люди шукають у медіа інформації та підтримки, щоб зрозуміти ситуацію та знайти шляхи подолання кризи. Моніторинг медіаспоживання під час війни важливий для аналізу думки громадськості про те, як вони використовують медіа, як вони сприймають обмеження на використання медіа, хто несе відповідальність за фейки та дезінформацію, а також які джерела викликають довіру.

Ключові слова: українські медіа; гібридна війна; медіаспоживання; корпоративна соціальна відповідальність; дезінформація; соціальні медіа.

ABSTRACT. *This article examines the impact of the Russian-Ukrainian hybrid war on the Ukrainian media landscape and media consumption. A mixed-method research methodology was used to reveal quantitative and qualitative changes. Despite losses in TV channels, radio stations and printed media, most media companies hadn't stopped broadcasting near war zone and launched united initiatives at the start of the war. Humanitarian media activities focused on crowdsourcing, fundraising, and information support for displaced people, army divisions, and the general Ukrainian public. The authors note that the peak of the humanitarian media campaigns for the war in Ukraine was during the first several months of the war. Most of the initiatives had long-term duration. The focus of crowdsourcing and fundraising campaigns, organized by the media, moved in dynamics primarily from people from the war zone who lost their work, home, and relatives in 2022-2023 towards army support and strengthening the defence of the country in 2023-2024. Increased news consumption through social networks was noted, with high trust in official sources like the President and Armed Forces. The media played a crucial role in national unity, with a strong emphasis on corporate social responsibility. Media consumption surveys identified disinformation narratives, strategies, and peculiarities of news consumption habits during the war.*

The authors believe that the media has a powerful influence on the formation of people's views and beliefs. People look to the media for information and support to understand the situation and find ways to overcome a crisis. Monitoring media consumption during wartime is important for the analysis of the public's opinion about how they use the media, how they perceive restrictions on media use, who is responsible for fakes and disinformation, as well as which sources inspire confidence.

Keywords: *Ukrainian media; hybrid war, media consumption; humanitarian response; corporate social responsibility; disinformation; social media.*

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The Russian-Ukrainian hybrid war (2022–2024) had a significant influence on the Ukrainian media landscape, changing the flow of information warfare not only the way how the information was reported, widespread and consumed but also the role of journalism in society in general.

Traditional media were challenged in the quickly changing environment by both external and internal factors, such as safety and security risks for the journalists, who are reporting from war zone; increased news coverage by the social media, increased regulations due to national security concerns; the spread of disinformation and propaganda, leading to more confusion and anxiety among the public.

On the other hand, media outlets lost a significant portion of their advertising revenue but needed to support broadcasting near war zones, prepare and protect war correspondents, and develop reporting techniques such as utilizing drones and satellite imagery to report from the frontline.

This research aims to delineate the primary trends in the transformation of the Ukrainian media landscape and media consumption under

the influence of the Russian-Ukrainian war (2022–2024).

A mixed-method research **methodology** was employed to summarize quantitative and qualitative changes. A comparative method was used to evaluate quantitative changes using data from analytical reports of international organizations and national media authority bodies spanning from 2021 to 2024. Qualitative changes in media organizations' policies during wartime were assessed by collecting data on media activities responding to the Russian invasion from the official websites of media organizations and typologizing them. Media consumption surveys and the conclusions of focus groups were described over the years 2021 to 2024, along with other criteria, to understand the interconnectedness and correlations of changes in the media landscape.

Analysis of the Annual (general) activity reports of the National Council on Television and Radio Broadcasting of Ukraine (2021–2023) showed a decrease in the quantity of mass media, broadcasting to the occupied and frontline territories, as well as a decrease in printed media activities and distribution. According to official data, 234 media companies stopped broadcasting

at the start of 2023, and only 43 restarted their work. Among them are 100 TV channels, 83 radio stations, and 51 providers of program services [2,3]. In territories close to the occupied and war zones, major TV and Radio companies, such as Starlight Media, 1+1 Media Group, TAVR Media, UMH Group, Hromadske Radio, and others, tried to maintain broadcasting and radio transmitters. As infrastructure damage in the frontline zones was significant, local newspapers sometimes functioned as volunteer projects—for example, the newspaper «Trudova Slava» in the city of Orihiv in the Zaporizhzhia region. In an interview with a journalist from the NUJU on «Increasing the sustainability of Ukrainian media,» the editor-in-chief of the newspaper «Trudova Slava,» Svitlana Karpenko, from the frontline town of Orihiv in Zaporizhzhia, said: «Today, we work as volunteers, without any salaries, if only people would receive the information, they need... The city is still largely without electricity, and the newspaper is the only way for people to learn about what is happening around them» [5]. In the report of the National Union of Journalists of Ukraine-2023, data were mentioned indicating that with the help of sponsorship and volunteering, the Union was able «to restore or continue the work of more than 230 newsrooms, support more than 3,000 journalists, including those affected by the war.» [4]

As a response to the invasion at the start of the war, the biggest Ukrainian media groups, 1+1 Media Group, Starlight Media, Inter Media Group, Media Group Ukraine, My-Ukraine, as well as Public Television channel Pershyi and Rada TV, united their broadcasting around the clock to provide information to the public regarding the war in a news program called “United Marathon.” At the request of the Cabinet of Ministers of Ukraine to support daily information about the activities of state bodies concerning national security in the time of war, an information platform called “UA Together” for media was created [6]. By the end of 2023, the viewership of United Marathon had dropped [19].

Obtaining reliable and accurate information amidst the chaos of the information war became challenging for journalists, creating difficulties with access to conflict-affected areas. In response, several initiatives were widespread and became popular. The project “Media Change Ukraine,” launched by journalist Maksym Onoprienko in 2020 as an independent platform, collected about 30 regional and local TV companies from 22 regions of Ukraine. These media outlets provided their content to colleagues free from territories with limited access to information due to COVID

quarantine restrictions [8]. Ukraine’s National Council on Television and Radio Broadcasting supported this initiative during wartime. By 2023, 72 media companies were exchanging content from local territories about the current situation on the front line. The project also created a list of experts on different topics [9].

As a humanitarian media response to the war on Ukrainian territory, based on analyses of data from 78 national and local official media websites, several trends can be mentioned:

Among the activities of Ukrainian media in wartime are the following types: crowdsourcing and fundraising campaigns [10,11], charity concerts [13,14], information support projects [12], virtual museums [18], and special projects [15].

The target audience of the Ukrainian media projects and campaigns are three groups: people from occupied territories and war zones fleeing from war, army divisions in need of equipment, drones and protective ammunition, and the Ukrainian nation in general, with the target of the project — to unite the nation and people from different parts of Ukraine.

The peak of humanitarian media campaigns related to the war in Ukraine falls in the first several months of the war. Most of the initiatives have long-term duration. The focus of crowdsourcing and fundraising campaigns, organized by the media, moved in dynamics primarily from people from the war zone who lost their work, home, and relatives in 2022–2023 towards army support and strengthening the defence of the country in 2023–2024. In a broader perspective, as it was already mentioned, some of the humanitarian media activities were more fully scaled, addressing society at large with a patriotic aim to unite the nation, which helped to support the media’s reputation and gain the trust of the audience.

In the situation of a growing threat to the national independence of Ukraine, the media played a crucial role in supporting national unity and the resilience of the Ukrainian nation. In fact, from the start of the active phase of the war, the media showed increased engagement in media governance and corporate social responsibility activities.

According to the media CSR typology (Ingenhoff & Koelling, 2012), we can evaluate Ukrainian CSR practices during the war and the balance between the fields of Responsibility of media organizations using the database of this research. Responsible for Society CSR practices dominate the data, encompassing 75% of the dataset. Less represented are practices coded as Editorial Responsibility(35%), with some also

codified as Responsible for Society CSR practices and Responsibility for Employees CSR practices (15%). The last type, codified as Responsibility for the Environment CSR practices, is not presented in the CSR activities during wartime in Ukraine, as they are not widespread.

The problem with media consumption in Ukraine during the war is that the war creates an extremely complex and tense situation that significantly affects the way people perceive and use media. The media has a powerful influence on the formation of people’s views and beliefs. During times of war, this influence can be particularly strong as people look to the media for information and support to understand the situation and find ways to overcome a crisis. Monitoring media consumption during wartime is important for the analysis of the public’s opinion about how they use the media, how they perceive restrictions on media use, who is responsible for fakes and disinformation, as well as which sources inspire confidence.

Most of the latest polls in Ukraine include many questions, among which is the issue of media consumption in times of war. In the article, we focus on reviewing and analysing various surveys that allow us to assess how the war in Ukraine changed priorities in media consumption.

In the conditions of war in Ukraine, the dynamics of media consumption are being investigated by the Ilko Kucheriv Foundation “Democratic Initiatives” together with the sociological service of the Razumkov Center [20], the Institute of Mass Information [21], and the public organization

“Media Detector” [22], the non-governmental organization “Opora” [23, 29], the annual survey by USAID/Internews [24] and the research company Gradus Research [25].

We have highlighted thematic areas: the priority of sources during the war and trust in the media, Ukrainian opinion leaders, the attitude of Ukrainians towards current news, and the ability to recognize disinformation by the audience. All studies indicate that informational resources across the Internet and national TV channels take a backseat: only a third of surveyed citizens consume news from these sources [26].

The dynamics of most surveys show that traditional media are gradually losing as social networks and messengers are increasing their audience. Internet use statistics in Ukraine in 2024 show there were 29.64 million internet users in Ukraine in January 2024. Ukraine’s Internet penetration rate stood at 79.2% of the total population at the start of 2024. «Kepios» analysis indicates that Internet usage in Ukraine increased by 1.1 million +3.7% between January 2023 and January 2024. For perspective, these user figures reveal that 7.78 million people in Ukraine did not use the Internet at the start of 2024, suggesting that 20.8 percent of the population remained offline at the beginning of the year [27]. Social networks are currently the most popular media source for Ukrainian respondents. Telegram 47%, YouTube 32% and Facebook 10% are the most popular. These three social networks cover 89% of all social media visits, with all others being significantly less common.

The most popular social networks in Ukraine

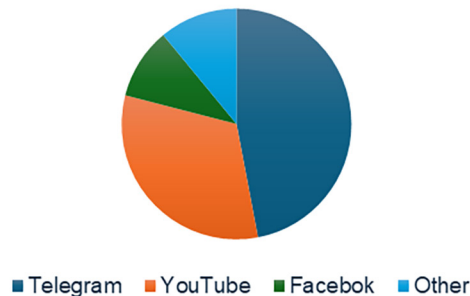


Figure 1. The most popular social networks in Ukraine.

Regarding the issue of media consumption during the war, the following results were presented: most respondents — 74%, believe that they received enough or even a lot of content about

the war. Despite the length of the war, people say they are not tired of news about the war — in 2023, the share of those who do not feel tired has increased to 58%. [28]. Most respondents trust the

materials covering the course of the war and believe they provide prompt and reliable information that qualitatively analyzes the events.

After the start of the full-scale invasion, Ukrainians reached a consensus on the role of Russian/pro-Russian media in the Ukrainian media field — most Ukrainians are critical of them [29]. Only 13% of Ukrainians consider the restrictions on the activities of pro-Russian media a political massacre, and 73% are convinced that, on the contrary, measures should be taken against them. Likewise, when it comes to news about the political situation and the situation at the front, 77% of Ukrainians agree that information from the Ukrainian mass media is sufficient.

Regarding the state regulation of the media, the opinions of Ukrainians are divided. There is a noticeable request for a tougher line and an active role of the state in this area. Many Ukrainians are pretty sceptical about their orientation in the informational field. In particular, 40% say that due to the large number of sources, it is difficult for them to determine where the truth lies. At the same time, 52% are confident they can identify one or more true sources. Also, more than half of Ukrainians 56% believe that the state is responsible for fighting fakes and disinformation, and 35% place this responsibility on the citizens themselves [30].

Among the news sources on the list, in 2023, messages from the President of Ukraine and official messages from the Armed Forces were relatively trusted. Messages from other political leaders and Ukrainian television also had high support. In general, all sources are trusted by half or more of the respondents, although pre-war polls show a much more critical attitude and a lower level of trust. Ukrainian newspapers are the least trusted, but this is due to the low level of use and the advertising of regional orientation for many printed publications.

Trust in friends and family regarding received news is low, although trust in one's environment was always quite high in pre-war Ukraine. This may indicate that enough reliable operational information can be obtained from various available sources (primarily official ones), so there is no need to fill in the gaps with personal reports and rumours. Ukrainians trust information about the progress of the war and also understand the restrictions imposed on information about arrivals and events at the front ("Of course, it would be interesting to know this, but it can harm the military operations") [28].

In 2023, there was no fatigue from news about the war; rather, there was a habituation to them, a calmer reaction to tragic events. The interviewees

noted that they lack positive news related to the civilian life of Ukrainians, so the media space is balanced and similar to what it was before the war in terms of culture, art, and education. There is also a request for information on the real losses of Ukrainian troops, the supply of modern weapons, the number of captured trophy weapons and Russian prisoners, volunteer work, and exposure of corruption in the authorities [28]. In 2024, Ukrainians increasingly believe that the West is tired of the war in Ukraine [31].

Unlike at the beginning of the war, when respondents followed the news 24/7, there is now a significant decrease in the frequency of news consumption. The respondents are gradually returning to everyday concerns related to their personal lives, to the permanent work they lost at the beginning of the war, the situation at the front has stabilized, and there is confidence that "Ukraine Will Win". Even though respondents very clearly and spontaneously name the signs of disinformation news, they rather use logic and intuition when consuming news. Therefore, news and sources of information are chosen precisely based on personal considerations rather than any objective criteria.

According to the research participants, the most plausible narratives are ineffective Western sanctions, misuse of Western weapons/aid and corrupt governments seeking war for profit. Some respondents have heard about fact-checking, and their attitude towards such materials is positive. However, the viewers rarely consume this content. Most often, respondents independently verify information either from various sources or by communicating with those who witnessed the event ("I call acquaintances who were somewhere near the event and ask if it is true, etc.") [28].

The main reason for using Russian media is to find out what they say about Ukraine, out of curiosity. Many Ukrainians completely abandoned the Russian media product [32].

President Volodymyr Zelenskyi was the undisputed opinion leader in 2022, although in 2024, his rating decreased somewhat. President Volodymyr Zelenskyy somewhat lost the trust rating of Ukrainians after he dismissed Valerii Zaluzhnyi from the post of Commander-in-Chief of the Armed Forces of Ukraine [34].

Most Ukrainians agree that news should cover facts, even if they are unpleasant (81%), news should be presented impartially, 76% and information about content authors is important, 70%. At the same time, 33% of respondents do not agree that it is important for the media to have good relations with the authorities, 40% do not agree that open

criticism of the authorities by information sources threatens national stability in Ukraine, 40% disagree, and 68% do not agree that when choosing

a news source, they take into account what other people (friends, relatives, colleagues) may think about this choice [28].

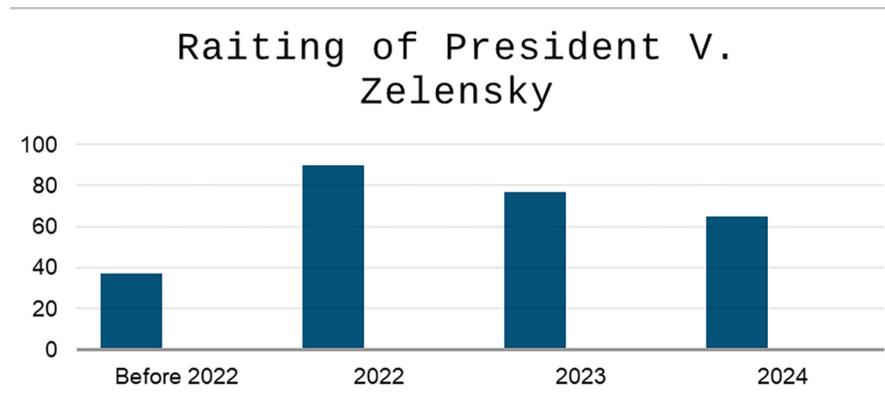


Figure 2. Rating of President V. Zelensky

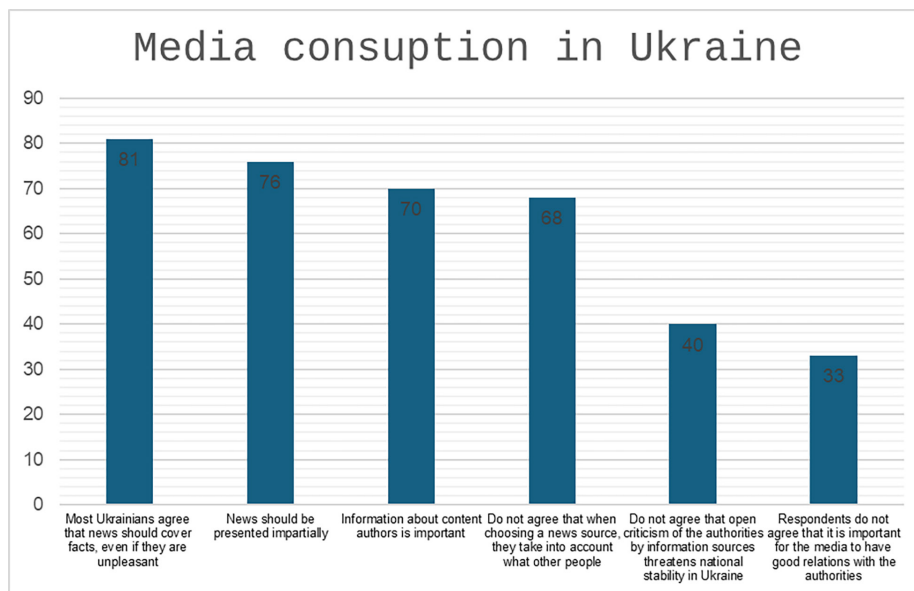


Figure 3. Media consumption in Ukraine

The majority of Ukrainians, 84%, know about the existence of disinformation, and 72% of those who know about it claim that they know how to distinguish disinformation content from the truth. However, only 38% of people who are aware of misinformation consider it a pressing problem, most likely because people tend to be overconfident in their ability to distinguish misinformation from the truth [28]. It should also be noted that a project was implemented in Ukraine as part of the All-Ukrainian mental

health program «How are you?» and created tips on healthy media consumption [36].

During the war, universal tips for media consumption in the face of war tragedies are checking the sources of information, whether it is worth with special care, whether it is worth regulating what should be watched and listened to, the necessity to draw a limit of acceptability for yourself — what you can watch/listen to without strong emotions, everything else is outside this limit; one should not consume media products that worsen one's

well-being. It is necessary to remember that «bot farms» operate in social networks that fulfill orders, spread explanations from fake «experts», and video evidence of non-existent events. It is also worth limiting the viewing of information that intensifies negative emotions; excessive immersion in the media can cause addiction, take time away from family, physical exercise, etc. [36].

Conclusions. The analyses of the impact of the Russian-Ukrainian hybrid war on Ukrainian media revealed the primary transformation trends of the Ukrainian media landscape and media consumption. Despite the losses of the TV channels, radio stations, and providers of program services in the territories close to the occupied and war zones, major TV and radio companies continued to maintain broadcasting; some local newspapers sometimes functioned as volunteer projects. At the start of the war, the biggest Ukrainian media groups, 1+1 Media Group, Starlight Media, Inter Media Group, Media Group Ukraine, My-Ukraine, as well as Public Television channel Pershyi and Rada TV, united their broadcasting around the clock to provide information to the public regarding the war in a news program called «United Marathon.» To overcome difficulties with access to conflict-affected areas, media companies were exchanging content from local territories about the current situation on the front line. The project «Media Change Ukraine,» launched by journalist Maksym Onoprienko, was one of the examples of such an approach.

As a humanitarian media response to the war on Ukrainian territory, based on analyses of data from 78 national and local official media websites, we can highlight the following types of media activities such as crowdsourcing and fundraising campaigns, charity concerts, information support projects, virtual museums, and special projects. The target audience of the Ukrainian media projects and campaigns comprised three groups: people from occupied territories and war zones fleeing from war, army divisions in need of equipment, drones and protective ammunition and the Ukrainian nation in general with a target of the project — to unite the nation and people from different parts of the country. The peak of the humanitarian media campaigns for the war in Ukraine was during the first several months of the war. Most of the initiatives had long-term duration. The focus of crowdsourcing and fundraising campaigns, organized by the media, moved in dynamics primarily from people from the war zone who lost their work, home, and relatives in 2022–2023 towards army support and strengthening the defence of the country in 2023–2024. On a

broader perspective, as it was already mentioned, some of the humanitarian media activities were more fully scaled, addressing society at large with a patriotic aim to unite the nation, which helped to support the media's reputation and gain trust from the audience. In the situation of a growing threat to the national independence of Ukraine, the media played a crucial role in supporting national unity and the resilience of the Ukrainian nation. From the start of the active phase of the war, the media showed increased engagement in media governance and corporate social responsibility activities.

According to the media CSR typology (Ingenhoff & Koelling, 2012), we can evaluate Ukrainian CSR practices during the war and the balance between the fields of responsibility of media organizations using the database of this research. Responsibility for Society CSR practices was dominant, encompassing 75% of the dataset.

In the conditions of war, the limits of consumption, according to recent studies, have revealed increased news consumption on social networks. The dynamics of most surveys showed that traditional media were gradually losing audience, and social networks and messengers were increasing their audience; more and more people recognized Russian aggression and denied the messages of Russian propaganda; trust in the most popular media was changing. Most Ukrainians agreed that there was enough information from the Ukrainian mass media. More than half of Ukrainians believe that the state is responsible for the fight against fakes and disinformation. The addresses of the President of Ukraine and the Armed Forces' official messages were highly credible. Messages from other political leaders and Ukrainian television also had support. In general, all sources were trusted by half or more of the respondents.

The main opinion leader remained the President of Ukraine, Volodymyr Zelenskyi, although his rating decreased somewhat in 2024.

Respondents trusted information about the war's progress and understood the limitations placed on information about arrivals and events at the front.

Despite the duration of the war, people claim that they were not tired of the news about the war — the number of those who did not feel tired had increased; instead, there had been habituation and a calmer reaction to tragic events. Respondents dosed information and used a limited number of sources. They noted that they lacked positive news about the civilian life of Ukrainians. There was also a request for information on the real losses of

Ukrainian troops, the supply of modern weapons, the number of captured trophy weapons and Russian prisoners, volunteer work and the exposure of corruption in the government.

Unlike at the beginning of the war, when respondents were constantly following the news, there has now been a significant decrease in the frequency of news consumption.

Even though respondents could clearly and spontaneously name the signs of disinformation in the news, they would rather use logic and intuition when consuming news. Therefore, news and sources of information were chosen precisely based on personal considerations, rather than any objective criteria.

According to the research participants, the most plausible narratives were ineffective Western sanctions, misuse (theft) of Western weapons/aid, and a corrupt government seeking war for profit. Some respondents had heard about fact-checking, and their attitude towards such materials was positive, but the respondents rarely consumed this content.

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Надіслано до редакції 05.10.2024 р.