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SPECIFICITY OF THE PRINT MEDIA MARKET OF UKRAINE IN THE CONTEXT OF THE GENERAL STATE OF THE MEDIA ECONOMY (2000 – JULY 2022)

In scientific research, an analysis of the state of the media market in Ukraine, in particular the print media market of the last twenty years, was carried out. Crisis periods of media development are singled out, in particular; special attention is paid to the COVID-19 pandemic and the period of modernity that the state is experiencing since February 24, 2022 – the full-scale invasion of Russia into Ukraine. The war caused a new configuration of the mass media market of Ukraine. In addition to the catalysts of sharp changes in the print media market of Ukraine, the specifics of the general state of the media market, factors that significantly affect the development trends of the general media market have been identified: digitization, destruction of logistics, periodicals, the outflow of advertisers from traditional media, rising prices for raw materials, lack of consumer culture subscription information because there is a free alternative.

With the help of our own survey, the purpose of which was to obtain data on where consumers get information from when the war began, it was found that social networks became the main source of information for Ukrainians after February 24, 2022. At the same time, checking the received information is a mandatory activity for information consumers. In this regard, answering the question: what caused the fact that the total majority of consumers of information check it? – it was found that this can be explained by four main factors that crystallized as a result of the appropriate state information policy during the war.

The format of work of the Ukrainian media in the first three months of the war is characterized by certain features: 24/7 working mode, psychological pressure, change of media product, change of business model of newsrooms, change of content, change of message to audience, change of funding sources.

Key words: media market, printed publications, digitalization, social networks, advertisers, business models.

Statement of the problem. The mass media economy of Ukraine is really difficult now. On the one hand, its development is influenced by the general world trends of the media market. On the other hand, it is necessary to understand that the Ukrainian consumer of information is somewhat different, for example, from the American or Russian one, and the media market has its own peculiarities and accents. In general, the media market is a litmus test of the general state and development of the economy of our Ukraine. It is also necessary to take into account the legal regulation of the Ukrainian media market and the political component, which are significantly different from countries where freedom of speech is subject to political and legislative persecution. Unconditional confirmation of the last thesis is the state of social communications in Belarus and Russia.

It is also necessary to pay attention to the fact that the general mass media market of Ukraine has

changed segmentally and quantitatively as a result of the full-scale invasion of Russia into Ukraine in February 2022. Complex and significant structural changes can also be seen in the markets of print media, advertising, and television. There have also been changes in the sources of information consumption, which we will be able to learn from our research.

In October 2021, the Thomson Reuters Foundation, as part of the project “Supporting independent media in the Eastern Partnership countries” of the Ministry of Foreign Affairs, Commonwealth Affairs and Development of Great Britain, presented the results of a study of media consumption and an analysis of the mass media audience in Ukraine, Moldova and Georgia. According to the research, Ukrainians mainly use two sources of information: search engines and social media. And newspapers are read the least – only 23% of respondents [25]. So, this indicates, on the one hand, changes in consumers' sources of information, and on the other hand, that today traditional

media are exhausting themselves as the main source of information consumption among the population.

The print media market is an important component in the general information field, and is also a part of Ukraine's information security. Ignoring its condition, not understanding its trends, considering the total consumption of information through Internet media or social networks, can be a factor in the disappearance of a society that thinks and analyzes.

The Ukrainian media market is a variegated and complex phenomenon, which is characterized by the ability to be flexible and survive in difficult economic, legal, and historical and political conditions. It plays an extremely important role today – during the military occupation of the territory of Ukraine by the Russian Federation and the terror and genocide of the civilian population of our country.

Analysis of recent research and publications. Social communication and axiological approaches, methods of content analysis, synthesis and generalization are the main methods that were used in the process of scientific research.

The analysis of the print media advertising market was carried out in the study “Current state and prospects for the development of the print advertising market in Ukraine” [14]. In particular, the structure of the advertising market of Ukraine in 2014–2015 was determined, the reasons for the decline of the print advertising market were substantiated, and the disadvantages of print advertising were formulated.

The issue of language in the print media is raised in the article “Why Ukrainian media cannot stop printing in Russian: arguments and proposals” [17].

According to V. Kovalevskyi, the print media market is “characterized by accessibility for the majority of the population, but has significant time limitations related to the frequency of publication” [16].

The activity of foreign scientific developments, in which the print media market has been studied, is related to the Covid-19 pandemic. For example, in the article “The Print Media Convergence: Overall Trends and the COVID-19 Pandemic Impact”, the authors claim that in Russia there is no clear understanding of how national print media respond to new unprecedented challenges and try to cope with them. At the same time, it was the pandemic that mainly contributed to the actualization of such a concept as media convergence [10].

The print media market is also considered from the point of view of advertising market research. In particular, the London-based “The Business Research Company” annually conducts an analysis of the world print advertising market [1].

Lowrey W. and Gade J. P. detail the forces that shape and challenge journalism and journalistic culture, and explain why and how journalists and their organizations respond to problems, challenges, and uncertainty [27]. These views are valuable, because they make it possible to understand exactly how market relations, the economic component and the state can determine the strategy of media market development.

The research by Sjøvaag H. and Ouren T. is quite interesting, analyzing the Scandinavian media market, they single out three factors that affect its functioning: controversial state regulation, trends in corporate journalism itself, and social/public trust in the media. These categories determine the style of mass media management at the administration level [23]. For our research, this source is also valuable, because the Ukrainian system of media market functioning in peacetime, and even during the covid pandemic, was also influenced by these three factors. During the war, it was possible to observe the dominant role of the state regulation of the information space of Ukraine.

Task statement. The purpose of the research is to outline the features of the print media market development in modern conditions and challenges.

The specified goal determines the setting of several tasks:

- 1) to single out the crisis periods of the development of print mass media over the past two decades;
- 2) to trace the development trends of the print media market;
- 3) to find out the factors affecting the print media market in modern conditions and challenges.

Outline of the main material of the study. According to data released by the State Television and Radio Broadcasting Committee of Ukraine in the first quarter of 2021, at the end of 2020, 1,514 newspapers were published in Ukraine, of which 467 were nationwide [13].

Following the dynamics of the publication of newspapers and supplements to newspapers in Ukraine since the beginning of the second world crisis in 2013, we will see that their number steadily decreased every year and by the beginning of 2021 had decreased by 741 units or by 32% [5] (Pic. 1).

Actually, such dynamics of the newspaper market clearly characterizes the state of development of the general print media market, which in 2013 featured 5,529 periodicals, and seven years later only 3,773. That is, in fact, the overall print media market has shrunk by 31% [5].

At the same time, it should be emphasized that the number of publications continued to decrease. Thus, in 2021, according to the data of the Book Cham-

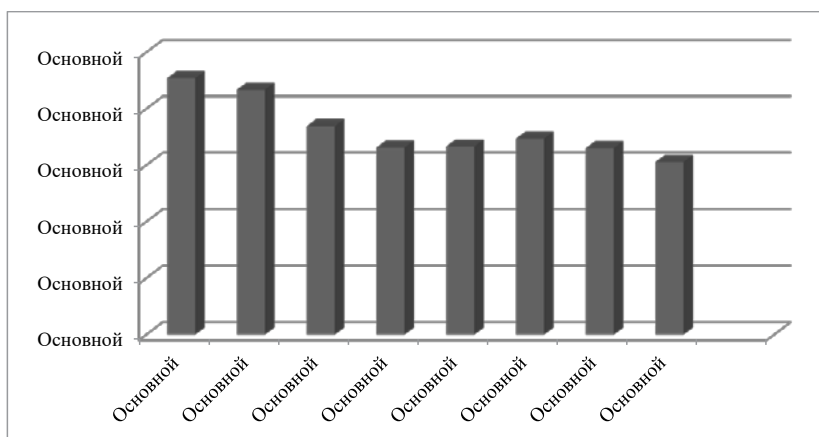


Fig. 1. Dynamics of publishing newspapers and supplements during 2013–2020

ber of Ukraine, the number of published newspapers amounted to 1,387 titles [3], which is 142 editions less than in the previous year. As for the next year, as of June 2022, the Book Chamber of Ukraine counted only 728 magazines and 837 newspapers [2], which, due to objective circumstances, testifies to a disappointing tendency to reduce the output of periodical printed products.

Peculiarities of the development of the print media market in Ukraine are related to many voluminous, objective and interdependent factors, which in the time frame of 2000 – the first half of 2022 have certain and specific characteristics.

The crisis of the printed press in Ukraine coincides with four general and all-encompassing crisis periods.

The first period. 2008 – economic crisis. During this period, publications reduced their budgets, and some did not stay on the market at all.

The second period. 2013–2014 – the second economic crisis. Due to the decrease in the number of subscribers, printed publications again reduced their budgets, and some ceased to exist. In the same year, the largest subscription agency “Samit” went bankrupt, and the publishing house “Komersant” also left the market. Some of these publications – “Halyski Kontrakty” have switched to the online format.

The consequences of this second economic crisis for print media were ruthless in perspective, both from the standpoints listed above, and from the standpoint of the problem of functioning of quality print media in Ukraine. Already in 2018, in the publication of the newspaper “Den” “How to save Ukrainian media”, we read: “Popularity, trust and advertising are the three pillars on which the media market stands. But in Ukraine, all three pillars of the media industry are going through a significant crisis... Now the most seri-

ous crisis in the country's media market is ongoing, related to purely material issues.” [15].

The third period. 2019–February 2022 – the COVID-19 pandemic – the beginning of a full-scale Russian war in Ukraine. According to Detector-Media's calculations, as of 2020, the publication of 110 newspapers and 63 magazines has been suspended as a result of the quarantine. This especially affected national publications (“Den”, “Ukrayinsky Tyzhden”, “NV”, “Fokus” and others). Almost immediately after the announcement of the quarantine, the publishing house “Ukrayinskyi Media Dim”, which is part of the “Ukrayinskyi Media Kholdynh” (UMH Group) and publishes the newspapers “KP v Ukrayini”, “Arhumenty i fakty”, magazines “Telenedelya”, “Korespondent”, “Denhy”, “Futbol” and others stopped publishing its publications [26].

It should be noted that during this period, the Ukrainian Association of Media Business, the National Union of Journalists of Ukraine and the Association of Independent Regional Publishers of Ukraine tried to defend the position of printed products on the eve of the first lockdown, demanding that the Ministry of Health include it in the list of products, the sale of which was allowed under strict quarantine conditions.

Thus, it can be argued that the market of print media, as well as the market of traditional media in general, experienced and is still experiencing a shortage of money. Such a financial situation generates the following consequences: 1) a drop in income from subscriptions and advertising; 2) downsizing in the media; 3) reducing the financial remuneration of journalists (this applies not only to wages or fees, but also to the introduction of the practice of payment of labor in accordance with work under the agreement).

According to the results of the “Report on the global print media market for 2021” [10], which was

prepared by the international company “Imarc”, it was expected that the world print media market will grow from 287.87 billion dollars in 2020 to 313.28 billion dollars in 2021 year at a compound annual growth rate (CAGR) of 8.8%. The growth is mainly due to the fact that companies are restructuring their operations and “recovering” from the effects of COVID-19, which led to restrictive measures, the consequences of which are: social distancing, remote work and closure of commercial activities.

The fourth period. From the end of February 2022, during the full-scale aggression of the Russian Federation on the territory of Ukraine, the next stage of the development of printed publications begins. As N. Dankova rightly observes, newspapers and magazines “are losing weight, buying paper in Belgium and Finland, hoping for grants, moving online and social networks – in short, despite everything, they are trying to stay on the market” [6]. Violation of the logistics of delivering the necessary material and equipment for the production of a high-quality printed publication, its distribution (impossibility to do this in the war zone and occupied territories), the outflow of advertisers, or more precisely, the disappearance of the advertising market in general, the reduction of labor resources – these are the challenges that had to be faced and still have to fight the print media market at the time of writing. As a result, many newspapers went on hiatus already in the first days or weeks of the great war.

It is worth noting that the third month of the war was a turning point for many editorial offices. Some publications closed down (in particular, the all-Ukrainian newspaper “Den”), some others – on the contrary – were able to resume printing at the end of May or in early June (in particular, the Kharkiv newspaper “Slobidskyi Kray”, the Chernivtsi “Sim dniv”, etc.). Newspapers are looking for new sources of income and business models in order to survive: in Chernihiv region, three editorial offices united to publish a joint newspaper, in Khmelnytskyi five newspapers of one media company were united, Odesa newspapers “Odesskaya zhyzn” and “Na pensii” are published now not in Kyiv, but in Ternopil. Meanwhile, “Ukrposhta” has started a subscription campaign for the second half of the year in all regions except Luhansk, Donetsk and Kherson.

The newspaper “Obriiy Izyumshchyny” has switched to an online format and now supports the Facebook group “Izyumskyy Navigator”, which works as a mass media and disseminates information about the search for people, evacuation, etc.

In the relatively calmer regions of Western Ukraine, printed publications also felt the impact of the war.

Thus, the most widely circulated newspaper in Lviv, “Ekspres”, did not stop publishing after February 24, only “lost weight” from 24 pages to 16. They saved on the TV program, because now most channels show the same thing – a joint marathon. According to the editor-in-chief of the newspaper, Ulyana Vityuk, after the beginning of the full-scale invasion, the editorial office started working on the portal for Ukrainians in Poland, Ukrayina.pl [6].

As a whole, the editions were able to be printed again, when one of the most painful issues of print media was solved – the lack of paper. Previously, 90% of paper was imported to Ukraine from Russia and Belarus; after the cessation of trade with the aggressors, the price of paper, which began to be delivered from Poland, Germany, Belgium and Finland, doubled, which accordingly affected the final price of the publication for the buyer.

President of the Ukrainian Association of Media Business, Oleksiy Pohoryelov noted that after the first three weeks of the war, more than 80% of newspapers and magazines were working. Some of them, having lost the opportunity to print and deliver newspapers, focused on distributing content on websites and social networks [20]. The association managed to get help from international media organizations to save Ukrainian print publications. In particular, the foundation of the Polish edition “Gazeta Wyborcza” donated 70 tons of newsprint to Ukrainian publishers, the World Association of Newspapers and News WAN-IFRA and one of the largest Scandinavian media conglomerates Schibsted saved 57 printed and 40 digital media.

Despite all the problems with printing and logistics, “Ukrposhta” started at the end of April the first subscription of newspapers and magazines during the martial law for the second half of 2022. Subscriptions for electronic catalogs began on April 25, and for printed catalogs from April 28 for all regions of Ukraine, except for the territories of Luhansk, Donetsk and Kherson regions. The resumption of delivery of newspapers and magazines in liberated settlements takes place under the conditions of safety for customers and employees of Ukrposhta. It should be noted that “Ukrposhta” itself has already lost more than 500 branches by the beginning of April 2022 [28].

Since the beginning of the war, Pylyp Orlyk Institute of Democracy has been monitoring the press. It was the monitoring that showed that the stabilization of the market of printed editions in calmer regions such as Lviv took place only in the 6th month of the war. Most of the newspapers were able to return to their pre-war volumes and even in some places resumed

printing of television programs [12]. We have a different situation with printed publications in the regions that were subjected to occupation, such as Sumyshchyna.

In addition to the above-mentioned temporary and historically significant catalysts for sharp changes in the media market of Ukraine, it is necessary to single out the factors that significantly influenced the functioning of the print media market today.

Factor 1. Digitalization, which has absorbed all spheres of human life, including the way of information consumption. For print media, this phenomenon has two global meanings: first, the possibility of a printed periodical brand to function on the media market, which in the long run may lead to the following – a decrease in circulation, and possibly the disappearance of its traditionally paper version. Already today, on the Ukrainian media market, previously printed publications such as “Dzerkalo Tyzhnya”, “Sehodynya”, “2000”, “Den”, “Vysoky Zamok”, “Tyzhden”, etc. have switched to online format.

However, despite the global trend of such a transition, one can agree with the words of the American political commentator Jack Schaefer that the printed press remains the best format [21].

Factor 2. Logistics. The destruction of logistics and distribution networks is frequent, as a result of which the cost of delivery channels has increased significantly. We are talking not only about the closing of newsstands (for example, the Lviv “Vysokyy Zamok” and “Ekspres” newsstands), but also about the reduction of postal branches of the state enterprise “Ukrposhta”. The latter actually became a significant factor, because through the Ukrposhta branch, people from the most remote corners had the opportunity to receive a magazine or newspaper by subscription or purchase.

It is especially important to emphasize the state of logistics during the Russian-Ukrainian war, which began in February 2022. This fateful event led to the impossibility of working in the absence of normal conditions for entire editorial offices of print media in hot spots, as well as the general destruction of printing logistics and distribution of print media on an all-Ukrainian scale.

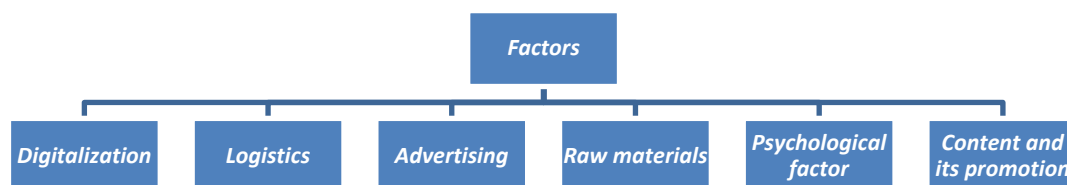
Factor 3. Advertising. Outflow of advertisers from the newspaper and magazine market. Continuing the theme of the war, there was a large-scale outflow of advertisers from the entire media market. It also affected the sphere of online media.

Factor 4. Raw materials, or rather their increase in price. It is clear that the price of the issue number includes the cost of raw components (paper, paints, plates), which are imported and purchased only for currency on limited foreign markets. At the same time, publishers are forced to keep the selling price, taking into account the limited purchasing power of the population, and the cost price increases and directly depends on the dollar exchange rate [3]. During the war, it is not so much about rising prices as about the shortage or absence of these raw materials, which we actually wrote about above.

Factor 5. Psychological factor: “information should be free” [29], so they will look for it on the Internet, social networks or television.

Factor 6. Content and its promotion. In addition to the mentioned catalysts, it is also necessary to talk about two more interrelated important things: the quality of the content and the ability to promote it (which means print media) in social networks. I. Verstyuk, a journalist of “Novoe Vremya”, rightly notes that the law of supply and demand in the media market is primarily a matter of content quality [29].

In the context of the general state of the media economy of Ukraine, special attention should be paid to the fact that today there is a dynamic growth in the role of social networks as the main source of information. And it is not only about the fact that social networks have the palm of the hand for the average Ukrainian. Recently, such social networks as *Facebook*, *Twitter* or *Instagram* have become part of the traditional toolkit of journalists for obtaining information about current events, public assessments and opinions, government activities, etc [9]. This trend is noticeable both in Western countries (for example, in the USA it is about 53% of citizens), and in Ukraine, where the share of users who consume news on social networks has increased from 45% to 63% [30]. And although researchers and public activists constantly



Pic. 2. Factors that have significantly influenced the functioning of the print media market today

warn that viewing news on social networks is not always safe due to misinformation or manipulative messages, the convenience and speed of such consumption outweighs all the mentioned risks.

Conclusions. The specifics of the print media market in Ukraine during 2000 – July 2022, in comparison with the general situation of the state of the media economy, includes a number of trends, factors and features. The clarity of the processes at each stage of its functioning is determined by certain defining events of a historical, economic and international nature. The peak of drastic changes

was caused not at all by the Covid-19 pandemic, but rather by the large-scale military invasion of Russia on the territory of Ukraine at the end of February 2022. If the pandemic gave some time to adapt the work of newsrooms in new conditions, then the unthinkable war in the country located in the center of Europe proved the complete unpreparedness of the Ukrainian journalistic community to act and work in the first days of the war. Only time, international support of the media front, flexible editorial management in financial and creative terms helped mass media to survive and continue to function.

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Гоцур О. І. СПЕЦИФІКА РИНКУ ДРУКОВАНИХ МЕДІА УКРАЇНИ У КОНТЕКСТІ ЗАГАЛЬНОГО СТАНУ МЕДІАЕКОНОМІКИ (2000 – липень 2022 рр.)

У науковій розвідці здійснено аналіз стану медіаринку в Україні, зокрема ринку друкованих медіа останніх двадцяти років. Виокремлено кризові періоди розвитку медіа, зокрема особливу увагу звернено на пандемію COVID-19 та на період сучасності, який переживає держава з 24 лютого 2022 року – повномасштабного вторгнення Росії в Україну. Війна обумовила нову конфігурацію масмедійного ринку України. Крім каталізаторів різких змін на ринку друкованих медіа України, специфіку загального стану медіа ринку, визначено фактори, які суттєво впливають на тенденції розвитку загального медіаринку: діджиталізація, руйнування логістики, періодичних видань, відтік рекламодавців із традиційних медіа, підвищення цін на сировину, відсутність культури споживання передплатної інформації, оскільки є безкоштовна альтернатива.

Визначено специфіку загального стану медіаринку, відстежено зміни та певні характеристики його розвитку в умовах російсько-української війни та загальної світової економіки. Звернено увагу на роль соціальних мереж та інтернет-медіа в загальній конфігурації інформаційного ринку. Зауважено, що ринок друкованих медіа програє іншим ринкам, адже не витримує конкуренції з іншими видами ЗМІ. Але він намагається адаптуватися через застосування власних онлайн-версій та сервісів. При цьому це відбувається досить успішно. Друковані медіа з початком війни головний акцент зробили не на друці, а на активізації власних інтернет-версій та сторінок у соціальних мережах.

Формат роботи українських ЗМІ в перші три місяці війни характеризується певними особливостями: режим роботи 24/7, психологічний тиск, зміна медіапродукту, зміна бізнес-моделі редакцій, зміна контенту, зміна меседжу, аудиторії, зміна джерел фінансування. Ринок друкованих ЗМІ переживав і досі переживає дефіцит грошей.

Ключові слова: медіаринок, друковані видання, діджиталізація, соціальні мережі, рекламодавці, бізнес-моделі.