

# Navigating Change: Ukrainian Television Trends, Challenges, and Global Competitiveness in a time of War

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- PR Communications Lead for Burning Man Ukraine & AD for HBO Max Series "The Garcias"



# Meeting Ukrainian Audience's Current Needs

## Emotional Needs

- Nostalgia -> Desire to revisit pre-war content -> Broadcasters use proven formats and long-standing franchises.
- Novelty -> Craving for fresh, innovative content -> Broadcasters launch projects that show the new reality.

## Practical Needs

- Content consumption through phones while in shelter.
- Content that is easily accessible, short format, distracting, comforting and humorous.

## Adapting to the New Reality

With the start of the full-scale war, many entertainment projects were put on hold, as content seemed inappropriate for the time. However, TV producers managed to adapt to the new realities and not only resumed old shows but also launched new ones.



CONNECTION  
ЗВ'ЯЗОК - NOVY KANAL



WHEN WE ARE HOME  
КОЛИ МИ ВДОМА - STB

## Reduced Popularity of Melodramas

The war has significantly reduced the popularity of melodramas, as viewers have enough drama in the real lives.

## Rise of Procedural Dramas

Procedural dramas, such as the "Women's Doctor," have become increasingly popular, accounting for around 60% of all series, compared to just 4% of melodramas.

## Potential for Reruns

Formats with the potential for multiple showings, and with vertical story structure, can sustain the channel's grid and series slots for a long time.



## Dopamine Boost

Quiz shows have become hugely popular among Ukrainian viewers during the war, providing a "dopamine hit" when viewers guess the correct answers.



WHO WANTS TO BE A MILLIONAIRE  
ХТО ХОЧЕ СТАТИ МІЛЬЙОНЕРОМ  
- ICTV2



THERE IS A QUESTION  
Є ПИТАННЯ - NOVY KANAL



THE 1% CLUB  
КЛУБ 1% - 1+1 UKRAINE

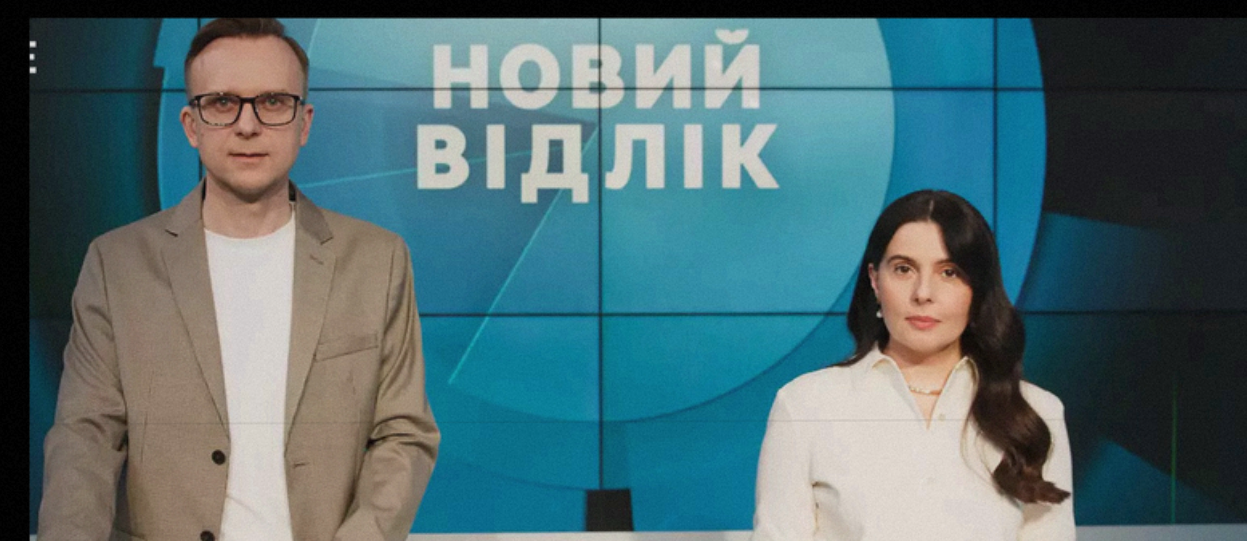


**THE BACHELOR**  
**ХОЛОСТЯК - СТВ**

## Entertainment with Purpose

Ukrainians have developed a strong interest in their own **history and identity** during the war.

**Documentary** projects focusing on veterans, military families, and the Holodomor have seen **unprecedented ratings**, as viewers seek to connect with their national narrative and heritage.



**NEW COUNTDOWN**  
**НОВИЙ ВІДЛІК - SUSPILNE**



### **Socially Significant Content**

A growing trend towards socially valuable content that **addresses important issues and promotes public awareness**. This type of programming has been particularly important in fostering national identity, societal well-being, resilience, and social cohesion during the ongoing war.



**THE SCHOOL**  
**ШКОЛА - 1+1 UKRAINE**



### **Catering to Young Adults**

There is a **lack of content for young people and teenagers** in Ukraine. To counter the popularity of russian series, co-productions could be a possibility for creating engaging youth-oriented content.



**THE SONG OF MY LIFE**  
**ПІСНЯ МОГО ЖИТТЯ - 1+1 UKRAINE**



### **Balancing Impact and Engagement**

The goal is to create content that is both socially valuable and engaging for the audience. Without strong viewership, the impact of the content can diminish, so **it's crucial to find a balance between social significance and viewer appeal**. One way to achieve this balance is by portraying stories and characters that the viewers can relate to, making the content more impactful.



# Increased Production and Streaming Platform Opportunities

Media groups are ramping up their own production. StarLight Media plans to create over **1,200 hours** of new content. The focus is on formats with vertical episodes, typical of the detective procedural genre.

The shift towards series production is a key trend, with 'Plus' intending to produce **4,000 hours** of its own content, especially increasing the number of series.

The Ukrainian market presents promising opportunities for content partnerships with local streaming platforms.

Streaming Platform	Content Focus
StarLight & Plus	Vertical episodes
Megogo	Social documentary projects
Sweet.TV	Reality and dating shows



# Content Opportunities & Demands



## International Appeal

Content should be created with an international audience in mind, not just the local Ukrainian market. Collaborating with international partners can help adjust the degree to which war is depicted to appeal to global viewers.



## Explicit Imagery

While global audiences want to stay informed, they may not be inclined to watch content with graphic depictions of war and sensitive images. Moderation is key to maintaining international interest.



## Audience Segmentation

International partners can provide valuable insights into what content will resonate with audiences in their respective countries. Their expertise can help Ukrainian creators navigate the do's and don'ts of producing content for a global market.

# Challenges Facing Ukraine's Media Landscape

## Funding Challenges

Securing funding is currently uneasy as international investors are **hesitant to invest in Ukrainian projects due to concerns about the safety of the crew**. Ukrainian companies are finding it more realistic to seek funding for finished products rather than projects in development.

## Co-Production Challenges

While some international partners are willing to co-produce with Ukrainian companies, their motivations are often more about positioning or pity rather than the quality of the stories and production value. **Ukrainians want partnerships based on the merits of their work, not sympathy.**

## Market Entry Challenges

Even when Ukrainian companies try to enter neighboring markets, they face **resistance from local partners who are intimidated by the high quality and low costs** of Ukrainian productions. This makes it difficult for Ukrainian media to expand beyond their domestic market.

**18-54**

Usual Target Audience

**18-60**

Aged Target Audience

**15-35**

Young Adults

## Continued Content Production

Despite ongoing production efforts, 70% of the current broadcasts were filmed prior to russia's full-scale invasion. However, here's 30% of content created during the war:



WHO'S ABOVE?  
ХТО ЗВЕРХУ? - NOVY KANAL



KITCHEN NIGHTMARES  
НА НОЖАХ - NOVY KANAL



THE VOICE  
ГОЛОС КРАЇНИ - 1+1 UKRAINE



MASTERCHEF  
МАСТЕРШЕФ - STB



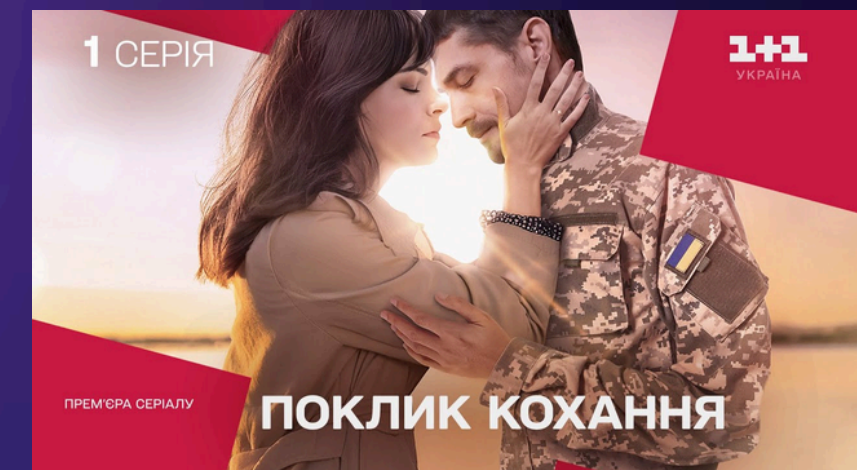
HELLISH FLOURS  
ПЕКЕЛЬНІ БОРОШНА - STB



FIELD HOSPITAL  
ПОЛЬОВИЙ ШПИТАЛЬ - 1+1 UKRAINE



I LOVE UKRAINE  
Я ЛЮБЛЮ УКРАЇНУ - ТЕТ



CALL OF LOVE  
ПОКЛИК КОХАННЯ - 1+1 UKRAINE

- Providing consultancy for international teams working on **Ukrainian-themed projects**.
- Offering support during meetings and negotiations involving **Ukrainian-English, English-French, or French-Ukrainian** communications.
- Facilitating the sale of **scripted and unscripted** projects.

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