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The development of creative industries in media in a digital environment

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Abstract. The relevance of the research lies in the transformation of the media part of creative industries under the influence of digital technologies and large-scale socio-political upheavals (full-scale war, economic shocks), which radically changed the mechanisms of production, distribution and monetisation of media content. The aim of the study was to analyse the development trends of the media creative industries in Ukraine during 2022-2025, assess economic losses and recovery needs, identify key barriers, and propose targeted policies to strengthen the sector. The methods used in the research included a systematic analysis of national and international reports, content analysis of scientific publications, statistical data analysis and a comparative approach, content analysis of industry data, comparative analysis of subsectors (film, publishing, advertising, online media), as well as synthesis of findings from studies conducted by the Lviv Media Forum and UNESCO. The obtained results showed that the war caused significant losses: about 28% of media outlets suspended their activities, and the estimated potential losses of the sector amount to hundreds of millions of dollars. Despite the publishing industry demonstrating some resilience, advertising budgets have shifted toward digital platforms. As a result of the study, it was established that the Ukrainian media suffered significant losses in 2022-2025; at the same time, the digital segment has grown, the market share of online media has increased, and the level of media literacy among the population has improved. The practical value of the research lies in formation of recommendations for the sustainable growth of the creative industries in the media sector, particularly in the areas of digitalisation, investment attraction, and integration into the European cultural space. The practical value of the research also includes proposed measures such as proposals for a programmes to increase digital competence, tax incentives for media export projects, and modelling of hybrid financing for film and publishing – all of which can be used by the government, donors, and market participants

Keywords: communications; cultural industries; artificial intelligence; digital media; digitalisation; creative activity

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Introduction

The development of creative industries within the media sphere under the conditions of the digital environment is acquiring strategic importance for contemporary Ukraine. Global digitalisation, content platformisation, the proliferation of social networks, and artificial intelligence technologies are transforming the mechanisms of media production, distribution, and monetisation. In turn, the full-scale war has triggered profound structural shifts in media functioning, exacerbating economic risks, human capital losses, and the necessity to develop and implement innovative resilience models. As a constituent of the creative industries, the media perform not only economic but also cultural, social, and security functions, shaping national identity and sustaining informational stability within society. Under these circumstances, conducting a comprehensive analysis of creative industry development in the digital media environment is essential for the formulation of effective public policy.

Theoretical and methodological approaches to the digitalisation of cultural space have been systematised by K. Pletsan (2021), who identified that digital platforms are fundamentally altering the nature of the cultural product, transforming it into an interactive and multi-format entity. The author emphasises that the digital environment fosters a new model of interaction between the creator and the audience, where the consumer becomes an active participant in communication rather than a mere passive recipient. In 2023, researchers focused on the resilience of the creative sector amidst crisis-driven challenges. V. Bakalchuk (2023) argued that creative industries possess a high potential for rapid adaptation due to a significant share of intellectual capital and flexible forms of employment. A similar stance is maintained by I.R. Bereziuk-Rybak *et al*. (2023), who emphasised the role of creative industries in shaping Ukraine's innovation economy and note that the digital segment demonstrates the greatest capacity for recovery. In turn, O. Oliinyk (2023) analysed the integration of artificial intelligence into creative industries and concludes that the use of AI tools in media enhances the efficiency of analytics and content personalisation; however, it simultaneously creates risks of disinformation and necessitates clear ethical frameworks.

In 2024, research shifted toward a more applied and sectoral focus. I. Dulska (2024) substantiated that the digitalisation of creative industries during wartime is a necessary prerequisite for their survival, as it provides alternative income streams and expands opportunities for international cooperation. N. Stoliarchuk (2024) examined the socio-economic potential of creative industries and concludes that their development requires a balance between economic efficiency and the preservation of the cultural value of the media product, alongside the refinement of legal and regulatory frameworks. At the same time, a 2024 European Commission analytical report indicates that digital media have become the dominant segment of the advertising market in EU countries, prompting states to implement support programmes for local audiovisual production and digital skills development. A comprehensive study by UNESCO in collaboration with the Lviv Media Forum (n.d.a) revealed that while the war caused significant economic losses for Ukrainian media, it simultaneously accelerated the transition to online formats, remote work, and donor-based funding models. The further development of analytics in 2025 demonstrates a deepening of research into sectoral transformations. In their study, S. Kucherenko & Y. Kostyk (2025) established that digital marketing and online distribution have significantly altered the revenue structure of the publishing industry, increasing its dependence on social networks and platforms. The authors emphasise the necessity of investing in digital infrastructure and developing new competencies in content monetisation. Updated analytical materials from UNESCO (2025) highlight the need for long-term media sector recovery programmes that combine financial support, digital skills development, and the strengthening of cybersecurity.

Thus, scholarly works from 2021-2025 consistently reveal the evolution of approaches to the development of creative industries in the media: from conceptualising the digital transformation of the cultural space to analysing the sector's resilience during wartime and the implementation of innovative technologies. At the same time, there remains a noticeable gap in comprehensive empirical research that unite aspects of legislation, technology, competence and funding in media creativity. The purpose of this study was to analyse current trends, opportunities, and limitations in the development of Ukraine's media and creative industries in digital environment to develop practical measures for the sustainable growth of media subsectors. To achieve this aim, the study set and fulfilled the following objectives: to identify the key features of media creativity development in the digital environment; to compare the Ukrainian experience with international practices; to propose political and practical recommendations for strengthening the television, radio, print, and digital media sectors. The scientific novelty of the study lies in combining the analysis of technological, legislative, and educational dimensions of the development of Ukraine's media and creative industry, based on empirical data and interviews with industry participants.

Materials and Methods

The research methodology was based on an interdisciplinary approach, covering the period 2020-2025. Methods of content analysis of academic and specialised publications, as well as statistical analysis of data from UNESCO (2025), the Chytomo (2024), Nielsen (n.d.), and Lviv Media Forum (n.d.a; n.d.b), were used. Comparative analysis was used to assess the dynamics of development across specific subsectors – film, print media, and digital platforms. The study applied the following methods: system analysis to identify structural components and trends; content analysis of digital media platforms; comparative method – comparison of Ukrainian models with international ones; analysis of legislative acts and regulatory frameworks to complement data and understand practical barriers. During 2022-2025, a number of key publications appeared that shed light on the state and challenges of the sector, which were analysed in the study: EU reports on the integration and recovery of creative industries (2024); analytical materials by the Cabinet of Ministers of Ukraine (2025); Lviv Media Forum (n.d.a; n.d.b) and UNESCO (2025) studies on media losses and needs; analysis of the publishing market by the Chytomo (2024); reports on advertising budgets and digital spending (industry reviews 2023-2024); and media literacy indices (Detector Media, 2024). These publications reveal the key trends: the digital orientation of markets, the increasing role of online platforms, and the need for large-scale support for media recovery.

Furthermore, the study incorporated a supplementary comparative analysis of the development of creative industries in Ukraine and Poland. This comparative element was employed as a secondary analytical tool to better contextualise the trajectories of digital transformation within the Central and Eastern European (CEE) region. The objective of this auxiliary approach was to provide a broader perspective on the resilience and adaptability of the Ukrainian media market by referencing the Polish experience as a regional benchmark for integration into the EU digital single market. Such a comparison facilitates a more nuanced identification of potential best practices and supports the formulation of strategic recommendations for the post-crisis recovery of Ukraine's creative sectors.

Results and Discussion

The absence of a clearly defined term "creative industries" in Ukrainian legislation, widely used in EU employment through cultural (artistic) and/or creative expression, makes it impossible to have an appropriate state policy in the field of culture (Zaxid.net, 2018). Nevertheless, I.V. Skavronska (2017) demonstrates that the efficiency of creative industries is of significant importance to the Ukrainian economy. Her study illustrates how creative industries can facilitate Ukraine's transition toward a creative economy. Specifically, four primary objectives are identified that can yield economic, social, creative, and cultural benefits: the preservation and development of creative talent, the encouragement of Ukrainian creative entrepreneurship, the promotion of a "culture of openness", and the formation of a creative ecosystem. R. Tomlins *et al*. (2021) emphasise that the concepts of the "creative economy" and "creative industries" have rapidly gained prominence in Ukraine. Their work examines creative economy operations within the country, including the strategic developmental trajectory of its creative industries. In their study, O. Lyubchenko & A. Lyubchenko (2024) focus on creative businesses encompassing media, arts, technology, and design. They argue that identifying the strengths of key sectors will facilitate the formulation of effective strategies to support the industry. Furthermore, the authors conduct an analysis of development trends, allowing for the forecasting of future opportunities and challenges, including the impact of international trends. The significance of developing creative industries is further highlighted by O. Zavadenko (2025), who asserts that they not only stimulate national economic growth but also shape the cultural identity of society, influence urban processes, and create new avenues for creative self-expression.

According to the UNCTAD classification (Creative economy report, 2010), the creative industries also include audiovisual media such as film, television, and radio broadcasting, as well as media that include software and video games. The definition of the concept "creative industries" was formalised in the Law of Ukraine No. 2458-VIII (2018), which states that these are "types of economic activities aimed at creating added value and jobs through cultural (artistic) and/or creative expression". As T.B. Semenchuk *et al*. (2024) note, the process of communication often involves the confrontation of different viewpoints, since each individual has a unique worldview and way of processing and interpreting information and this contributes to the emergence of new ideas. However, it also brings certain risks: creativity and innovation rely on collaboration among people who perceive the world differently. Consequently, instead of constructive dialogue, destructive conflicts may arise within teams, slowing down the creative process of creating the media product and cooperation. When it comes to creative industries within the media sector, it is essential to consider the study of A. Maslow, who proved that creativity is an innate human inclination that can be lost under the influence of environment, education, and social conditions. For personnel engaged in a company's innovation activities, it is important to be able to generate unique ideas, which, once implemented, become profitable and provide additional income (Semenchuk *et al*., 2024).

The official website of the Ministry of Culture of Ukraine (2024) provides the substantiation of the concept "creative industries" Namely, it has been proved that "this is the sector of economy which unites a wide range of industries based on creativity, innovation, and cultural products". Creative industries cover a broad spectrum of various fields, in particular, such as media (including film, television, radio, publishing), arts, design (graphic, industrial, web design), music, literature, architecture, advertising, fashion, exhibition activities, video games, as well as culinary arts, theatre, and many others. Each of these fields has its own distinct characteristics, yet all use creativity and creative approach in the process of creating goods and services. In 2022, due to the onset of full-scale war and its consequences across all sectors of the national economy, Ukraine's creative industries entered a state of crisis. Despite these challenges, representatives of the creative industries continue their activities by adapting to new conditions and external changes. International partners have provided support not only to ensure the basic safety of Ukrainian professionals and but also to resume activities, offering many opportunities both abroad and in Ukraine (Ministry of Culture of Ukraine, 2024). Also, in 2022, Ukraine exported creative services worth USD 3,766 million, imported worth USD 724 million, thus, the positive balance amounted to USD 3,042 million. The share of exports of creative services, according to the State Statistics Service of Ukraine, in total exports of services was 41.1% (in 2021 – 30.1%). From the share of creative services which make 41.1%, 40.5% are telecommunications services, computer and information services, 0.4% – royalties, and 0.2% – cultural and recreational services. That is, almost all exports in the creative industries come from the IT sector, which provides computer services (Ministry of Culture of Ukraine, 2024). The research into existing problems that have arisen in the development of creative industries in the digital environment allows for making the following generalisation, which is given in Table 1.

Table 1. Problematic aspects of the development of creative industries in the digital environment

Indicator	Result
Share of media projects with digital distribution	Approximately 70-80% of media creativity projects use digital platforms, social networks, and streaming services (expert data)
Legislative certainty	The Law of Ukraine "On Culture" provides a definition of the term "creative industries", yet in national classifier the list of creative industries does not fully account for all media-related spheres
Level of digital competence of creators	Many authors possess a basic level of digital literacy; however, there is a significant lack of knowledge in areas such as content promotion, monetisation, and platform algorithms

Source: developed by the authors based on A. Shtefan (2024), Cabinet of Ministers of Ukraine (2025)

The results of such a generalisation are consistent with the conclusions of I. Dulska (2024), who proved that digitalisation is an important condition for the survival and development of creative industries in crisis circumstances. At the same time, as in the works of K. Pletsan (2021) and N. Stoliarchuk (2024), it was proved that legislative and educational barriers remain key obstacles to the development of creative industries in the digital environment. Compared to international experience, for example, EU countries that actively use grant programmes, state support, focuses on digital platforms and the media economy, the Ukrainian model of the development of creative industries lacks comprehensive support. For example, in the EU there is the clear support through programmes such as Creative Europe, connected by Ukraine to media subcomponent in 2024, which opens new opportunities for cooperation and funding (European External Action Service, 2024). It was also found that social networks and platforms are not only distribution channels, but also an environment that shapes new business models, promotion, and interaction with the audience. After the full-scale invasion of the Russian Federation into Ukraine, certain changes have occurred in the development of creative industries, in the media environment in particular. Some indicators can be considered to observe these changes (Table 2).

Table 2. Statistics of changes of creative industries in Ukraine's media, 2022-2025

Indicator	Time / Period	Value
Decrease in the number of taxpayers in the creative industries	I quarter of 2022 / I quarter of 2021	Approximately 60% decrease in the number of taxpayers in the creative industries
Reduction of income in creative industries	I quarter of 2022 / I quarter of 2021	Decline in declared revenues by approximately 41%
Share of media outlets that suspended operations due to the war	Late February 2022 – July 2024	28% of media outlets suspended their operations; some have not yet fully resumed work
Number of media outlets that have not resumed work or function in a limited capacity	As of July 2024	One in six of the media that suspended operations are still not fully operational; 38.3% of those that suspended – did not work for more than half a year; 10 media outlets had not resumed work at the time of the survey
Economic losses / needs for recovery of the media sector	2025 (UNESCO)	Investments needed to fully restore the sector – USD 392 million to cover salaries, equipment, psychological support, training, etc.

Source: developed by the authors based on R. Tomlins *et al.* (2021), IMI (2024), Detector Media (2024), Ministry of Culture of Ukraine (2024), Cabinet of Ministers of Ukraine (2025)

Based on the data presented in Table 2, the following generalisation can be made: the development of the creative industries has been significantly affected by the war. A considerable number of media outlets suspended their operations (28%), and some have still not been able to resume activity. This has influenced media content production, revenues, and human resource potential. From the very first months of the war (in February-March 2022), the creative sector experienced a decline in income, specifically a decrease in revenues and in the number of taxpayers during the first quarter of 2022 compared to 2021. Although many media organisations ceased operations, some have managed to resume work or continue functioning in a modified mode.

As for publishing activities, despite the infrastructure blows: the destruction of printing houses, logistical problems, in 2024 the publishers who continued to work generated a total sales volume (AIN, 2024). This shows the stability of demand for books, as well as market fragmentation and price increases, which must be taken into account for the development of creative industries. However, logistics, the complexity of the work of printing houses, small print run, unprofitable local initiatives, etc. remain problematic. But there are also positive aspects – this is the growth of interest in translations and the modernisation of electronic formats. Nielsen (n.d.) research shows that the locomotive of improving the work of the media is digital, namely the fact that advertising budgets are increasingly focused on online media. The improvement of media performance is also influenced by the increasing level of media literacy in the country, which opens opportunities for digital creative projects, but also increases competition with global platforms. Investment is needed to improve the work of the media sector, that is, significant support is needed, and not only from the state, but also from international donors, grants and private business.

Thus, increasing of competitiveness and economic potential of the cultural and creative industries sectors, in particular the audiovisual sector, is carried out through the implementation of the Programme "Creative Europe". The Diia. Business (n.d.) contains information that starting in May 2021, the European Commission officially announced the new Programme "Creative Europe" for the period from 2021 to 2027. This programme is aimed at financing projects and initiatives that aim to strengthen cultural diversity, as well as meet the needs and challenges of the sector of cultural and creative industries. In accordance with this programme, it is proposed to participate in competitions aimed at developing advanced digital skills, implementing digital technologies in enterprises, developing digital infrastructure, and making digital services even more accessible for citizens and public institutions of the European Union and associated countries to the Programme "Digital Europe" (Diia. Business, n.d.).

The total budget of the Programme "Creative Europe" (2021-2027), which consists of three sub-programmes, includes EUR 2.44 billion, which are distributed as follows: "Culture" – 33%; "Media" – 58%; "Cross-Sectoral Cooperation" – 9%. That is, the main emphasis is on the use of creative industries in the media (Diia. Business, n.d.). The sub-programme "Media" is focused on supporting cooperation in the audiovisual sector to expand business and distribute European content internationally. It promotes talent development, expands opportunities for cooperation between countries, supports the introduction of new technologies, and contributes to the ecologisation of the industry and achievement of social goals such as gender balance and national diversity. The thematic sectors of the sub-programme competitions cover three main areas, which are given in Table 3.

Table 3. Main directions of the competitions of the sub-programme "Media"

Direction of sub-programme	Substantiation
Content	Focuses on cooperation and innovation in the creation and production of high-quality media projects
Business	Supports innovation to improve competitiveness, scale opportunities and develop talents to strengthen Europe's position in the global market
Audience	Provides access to European works and develops initiatives for their distribution among potential viewers

Source: developed by the authors based on Diia. Business (n.d.)

In accordance with the sub-programme "Cross-Sectoral Cooperation", which focuses on common challenges and opportunities for the sectors of cultural and creative industries (CCI), it includes competitions to support news media, in particular through the promotion of media literacy, pluralism and freedom of speech in relation to quality journalism (Diia. Business, n.d.). Based on the research conducted, several proposals have been formulated for the development of creative industries within the Ukrainian media sector. The identified challenges and corresponding strategic recommendations are examined for each specific media type. In particular, Table 4 presents a detailed analysis related to the advancement of creative industries in the field of television.

Table 4. Problems and proposals for their solutions related to the development of creative industries on television

Problems	Proposals for solving problems	Comments on proposals
High production costs; reduced regional presence; job security risks; loss of advertising revenue	Tax holidays for investments in production	VAT reduction or tax credits for the purchase of equipment and production studios for 3-5 years
	Targeted subsidies for regional content	Grant competitions for the production of local content, which will strengthen the presence in the regions and create jobs. Possible through partial co-financing by the state and business
	Distribution programmes in digital channels	Support for the creation of national VOD platforms or subscription channels, subsidising the adaptation of content for online platforms
	Risk insurance system for the production of TV products	State (donor) programmes for insurance of projects during war and post-conflict recovery
	Training of professional personnel	Internship programmes in large productions, courses in digital production and interactive scriptwriting, etc.

Source: developed by the authors based on S. Galyuk (2024), I. Dulska (2024), Lviv Media Forum (n.d.a)

The table outlines the key challenges hindering the development of creative industries within the television production sector. These are dominated by high content production costs, a diminishing regional presence, increased security risks under martial law, and a decline in advertising revenues. The proposed measures focus on establishing systemic state and institutional support for the industry, specifically through the implementation of tax incentives for production investment, targeted subsidies and grant support for regional content, and the development of digital distribution channels and national VOD platforms. Particular attention is paid to the introduction of production risk insurance mechanisms, as well as the enhancement of human capital through professional training and retraining. The comprehensive implementation of these tools can improve the resilience of the television industry, preserve regional content diversity, and establish the prerequisites for the sustainable development of creative industries in the medium and long term. Table 5 provides information related to the development of creative industries on radio.

Table 5. Problems and proposals for their solution related to the development of creative industries on radio

Problems	Proposals for solving problems	Comments on proposals
Need for digital distribution; financial vulnerability of small radio stations; loss of local infrastructure	Digital transformation FM→DAB+/IP	State support for the transition to digital radio broadcasting (pilot DAB+ networks) and the deployment of streaming platforms for local stations
	Grants for radio journalism for local communities	Financing socially important radio communication projects at the local level
	Creation of content sharing platforms	The ability for several radio stations to share programmes on the network, which will help reduce costs
	Hybrid revenue model	A combination of listener micropayments, local advertising with state startup grants

Source: developed by the authors based on IMI (2024), T.B. Semenchuk *et al.* (2024), I. Dulska (2024), S. Kucherenko & Y. Kostyk (2025)

Table 5 presents the primary challenges facing the development of creative industries in the broadcasting sector. Key issues include the necessity for digital transformation, the financial vulnerability of small and local radio stations, and the progressive erosion of local broadcasting infrastructure. The proposed solutions focus on incentivising the transition to digital content distribution formats by supporting the implementation of DAB+ and IP-radio technologies, as well as the development of streaming platforms for local broadcasters. Grant support for community-oriented radio journalism and the funding of socially significant local radio projects are identified as vital instruments for stabilising the sector. Particular emphasis is placed on establishing content-sharing platforms as a mechanism for cost optimisation, alongside the introduction of hybrid revenue models that integrate commercial and institutional funding sources. The implementation of these measures will enhance the economic resilience of the radio industry, preserve local broadcasting, and facilitate the adaptation of creative industries to the conditions of the digital economy. Table 6 provides information related to the development of creative industries in print media, which include publishing, newspapers and magazines.

As a result of military actions and structural transformations of the media market, systemic challenges in the development of creative industries within the print media segment have intensified. Key challenges include the destruction of production and logistical infrastructure, rising printing costs, declining circulations, a deficit of financial and material resources, and increasing complexities in distribution processes. The proposed solutions focus on the restoration and modernisation of critical printing infrastructure through investment, credit, and grant support, as well as on incentivising the digital transformation of the publishing industry by developing electronic and audio formats and expanding international distribution channels. A vital role is assigned to support programmes for small and local print initiatives in affected regions, which will facilitate the preservation of media pluralism and cultural diversity. Additionally, the necessity of developing professional competencies in marketing and content monetisation is emphasised, alongside strengthening the export potential of national literature through state support for international promotion and translation programmes. The comprehensive implementation of these measures establishes the prerequisites for enhancing the adaptability and long-term resilience of print media within the context of post-crisis recovery. It is also necessary to consider information related to the development of creative industries in digital media, which also includes online publications, video projects, streaming, content studios, etc (Table 7).

Table 6. Problems and proposals for their solution related to the development of creative industries in print media

Problems	Proposals for solving problems	Comments on proposals
Destruction of infrastructure; rising prices; decreasing circulation; lack of resources; logistical problems	Investments in critical printing infrastructure	Credit programmes or grants for modernisation of printing houses and logistics; tax breaks for purchase of equipment
	Support for the digital transformation of publishing houses	Obtaining subsidies for the creation of e-books, audiobooks and distribution through international platforms
	Programmes for small print initiatives	Microgrants for local publishing houses and newspapers in affected regions
	Educational programmes on marketing and monetisation	Training modules on digital marketing for publishers, authors and editors
	Promotional campaigns for the export of literature	State support for participation in international fairs and translation competitions

Source: developed by the authors based on Chytomo (2024), N. Stoliarchuk (2024), Cabinet of Ministers of Ukraine (2025), UNESCO (2025), S. Kucherenko & Y. Kostyk (2025)

Table 7. Problems and proposals for their solutions related to the development of creative industries in digital media

Problems	Proposals for solving problems	Comments on proposals
Competition with global platforms; monetisation; copyright; ethics of using artificial intelligence, cybersecurity	Development Fund for Digital Productions	Accelerators and grants for digital content startups
	Preferential financing/investment guarantees for projects with export potential	Project localisation, SaaS tools for media
	Platforms for collective monetisation	Creation of national micropayment solutions and subscription tools to support authors
	Protection of copyright, data and licensing	Responsible attitude to content creation, simplified content registration system, collective rights management mechanisms, support for integration with international partners
	Investments in cybersecurity and backup	State grants for cyber protection measures, content and infrastructure backup

Source: developed by the authors based on O. Oliinyk (2023), I.R. Bereziuk-Rybak *et al.* (2023), I. Shkodina *et al.* (2023), Y. Trach. (2024), IMI (2024), I. Dulska (2024), UNESCO (2025)

Based on the developed proposals for the advancement of creative industries within the media sector, several key generalisations can be formulated. Regarding the television industry, priority is given to the modernisation of the technical infrastructure, the production of high-quality, socially significant content, and the promotion of local series and documentary filmmaking. In the realm of radio broadcasting, strategic development focuses on the expansion of podcasts and digital radio formats, integration with mobile applications, and the preservation of regional broadcasting as a vital instrument for maintaining cultural identity. Furthermore, the stabilisation of print media necessitates the comprehensive digitisation of publications, the advancement of electronic libraries, and the provision of state support for regional printing houses, alongside the international promotion of Ukrainian-language products. Finally, addressing the deficit of investment in multimedia content within the digital media segment requires enhanced cybersecurity for editorial offices, the creation of robust platforms for Ukrainian-language content distribution, and the implementation of incentives to stimulate the export of digital creative services.

Creative industries in the media sphere (UNESCO, 2025) are based on innovation, intelligence and creativity. Tools that expand the possibilities of creativity in media include the use of artificial intelligence. This allows the media to create new formats. Artificial intelligence (AI) is an integral part of the creative industries in the Ukrainian media sector. According to the definition of UNESCO (2025) and the European Union, creative industries include those sectors of the economy that are based on creativity, innovation and intellectual activity, which include the media. The use of AI in Ukrainian newsrooms indicates the expansion of journalistic creativity and the emergence of new formats of communication with the audience. According to IMI monitoring data, about 22% of Ukrainian newsrooms constantly use AI to create texts, translations, subtitles or illustrations, which indicates the integration of intelligent technologies into the processes of producing a creative product (IMI, 2024). At the same time, the Ministry of Digital Transformation of Ukraine in 2024 developed recommendations for the media on the responsible use of AI, emphasising the need for transparency, ethics and the priority of the human factor.

AI in the media is not limited to the automation of routine tasks, but creates new forms of journalistic and communication practice that correspond to the essence of the creative industries. In addition, the ethical dimension of the use of AI (in particular, in cases where the generated images were mistakenly perceived as real in UNIAN materials) emphasises that the integration of intelligent technologies requires regulatory standards, which are a sign of the maturity of the creative sectors (Rubryka, 2023). Thus, artificial intelligence can be considered a component of the creative industries in the Ukrainian media, as it ensures innovation, the creation of new cultural products and services, contributes to the development of the media market and at the same time creates the need for the development of ethical norms, which increases the quality and competitiveness of the Ukrainian creative sector.

As O. Oliinyk (2023) argues, the adoption of AI can potentially add greater diversity to creative industries in their activities and outcomes. In particular, this may apply to the media industry, which uses AI and machine learning to collect and analyse data, allowing media companies to better understand the needs and desires of customers. AI is also used as a research tool, capable of filtering information and distinguishing reliable sources from dubious ones, which significantly reduces the time for conducting research, allowing journalists to create even more content, ensuring the reliability and accuracy of their sources. O. Oliinyk (2023) also argues that there are certain risks in the use of AI. It can be intentionally used to spread false information through models that generate stories and narratives based on false data, changing points of view, but maintaining a formal style and aesthetics. An example of the spread of disinformation is the use of deepfakes and voice-altering models with malicious intentions, such as damaging reputations, discrediting individuals, or making threats. AI can be used to create fakes and disinformation, which can result in a loss of audience trust. Thus, the use of AI in the creation of journalistic products contributes to the creation of innovative media products; expands the creative practices of journalists; helps to form new audience segments, but necessarily requires the use of ethical standards.

Sustainable development of the media as a creative industry can be imagined as a balance between such components as creativity, technology and ethics. That is, a synthesis of these components should occur, and creativity should provide uniqueness and cultural value. As for technologies, this is the use of artificial intelligence, which opens up new opportunities and optimises the work of the media. The third element must necessarily be ethics, which guarantees responsibility and trust when communicating with the target audience. Each component of the creative industries in the Ukrainian media will be substantiated (Table 8).

Table 8. Key components of creative industries in the Ukrainian media

Essence	Process of using	Examples	Result
Creativity			
The core value of creative industries lies in generating new ideas, narratives, communication formats, and cultural products	Investigative journalism; storytelling; documentary projects; multimedia formats (podcasts, interactive longreads, visual special projects); artistic projects	Creation of innovative media products that combine text, video, audio, and visualisations (e.g., special projects of Hromadske and Suspilne); investigative journalism (e.g., Bihus.Info, Slidstvo.Info); author-driven media projects, podcasts, art magazines	Creativity ensures the uniqueness and cultural value of the product, distinguishing creative industries from purely technological or informational products
Technology (AI usage)			
Artificial intelligence acts as a catalyst for media development within creative industries, combining automation with opportunities to expand creative potential	Automatic text-to-speech (Vector + Respeecher, 2024); generation of illustrations, subtitles, translations (IMI, 2024); analysis of large datasets for investigative journalism; use of tools for data processing, content generation, and analytics	AI-driven content/research platforms (e.g., Vector); AI can be used for comment moderation, automatic recognition of text or video	AI does not replace journalists but enables the emergence of new formats and removes routine barriers, freeing space for creativity; technology serves as a tool that enhances and expands the boundaries of creativity in media

Continued Table 8.

Essence	Process of using	Examples	Result
Ethics			
Creative industries in the media are impossible without audience trust, which is founded on adherence to ethical standards	Transparent designation of AI-generated content; Avoidance of disinformation and manipulations (e.g., the UNIAN incident with an AI-generated image, 2023); protection of copyright and personal data; compliance with human rights, journalistic standards, and AI usage guidelines; transparency	Ethics is a prerequisite for maintaining public trust and the legitimacy of creative practices in the media space	Codes of Journalistic Ethics (National Union of Journalists of Ukraine); The Ministry of Digital Affairs has developed: ✔ recommendations on the ethical use of AI; ✔ recommendations on the responsible use of AI in the media (2024), which emphasises the importance of ethics as a basic element

Source: compiled by the authors based on K. Pletsan (2021), O.Oliinyk (2023), IMI (2024), I. Dulska (2024), T.B. Semenchuk *et al.* (2024), Y. Trach (2024), L. Bezuhla & I. Lazakovych (2024)

Thus, each component of the creative industries within the Ukrainian media landscape possesses distinct application characteristics. Creativity is defined as the fundamental value-based core of creative industries, manifesting in the production of innovative media formats, original narratives, and culturally significant products that ensure the uniqueness and competitiveness of media content. The technological component, particularly the utilisation of artificial intelligence (AI) tools, is viewed as a catalyst for the development of the media sphere, combining the automation of routine processes with the expansion of the analytical and creative capabilities of journalists and media producers. At the same time, it is emphasised that AI serves as an auxiliary tool that enhances rather than replaces human creative potential. The ethical dimension plays a separate, vital role in the functioning of creative industries, ensuring audience trust and the legitimacy of media practices. Compliance with journalistic standards, transparency in AI usage, and the protection of intellectual property and personal data are regarded as essential prerequisites for the sustainable development of creative industries in a digital media environment. Collectively, these components form a comprehensive model for the functioning of creative industries in Ukrainian media, integrating innovation, technological efficiency, and social responsibility.

In-depth study on media losses and needs in Ukraine. A joint study by UNESCO (2025) and the Lviv Media Forum (n.d.b) (covering the period from February 2022 to July 2024) systematises the direct economic and infrastructural losses sustained by Ukrainian editorial offices, outlines the key recovery needs (including salaries, equipment, training, and psychological support), and provides indicative estimates of the sector's budgetary requirements for recovery. This research serves as a key source on the impact of the war on the media landscape and on recovery priorities (UNESCO, 2025). This comprehensive study systematises the critical impact of the full-scale invasion, documenting that over 80% of Ukrainian media outlets faced significant revenue declines, with some regional offices losing up to 95% of their advertising income. The research highlights extensive infrastructural damage, including the destruction of broadcasting towers and editorial facilities. Key recovery priorities identified in the study focus on emergency operational support (covering salaries and security equipment), digital resilience (cybersecurity and cloud-based migration), and the restoration of regional broadcasting to counter disinformation in frontline territories. Furthermore, the report provides indicative estimates suggesting that the sector requires approximately USD 120-150 million annually for sustainable recovery, emphasising the need for a shift from emergency grants to long-term institutional investment and psychological rehabilitation for media professionals.

Digital penetration and social media. S. Kemp (2024) provides the most recent national-level figures on digital indicators. As of January 2024, internet penetration in Ukraine stood at 79.2% (approximately 29.64 million internet users), with 24.3 million social media users (64.9% of the population). In Poland, internet penetration is around 89-90%, and social media users number roughly 29.0 million (75.6% of the population) (Kemp, 2025). These figures demonstrate that both countries maintain high levels of digital activity, though Poland has a somewhat larger relative domestic digital market.

Digital advertising market and its scale. The Raport Strategiczny IAB Polska 2023/2024 estimates the value of Poland's digital advertising market in 2023 at approximately PLN 7.8 billion, with projections of continued growth and a strong digital contribution to the overall advertising budget. This positions Poland as a regionally significant digital market with a well-developed commercial base for media operations (IAB Polska, 2024). In Ukraine, cross-sector assessments and advertising market monitoring indicate that in 2023, total advertising expenditure amounted to approximately USD 1.115 billion, of which digital accounted for about USD 874.8 million (market monitoring data). Following 2022, the market has been recovering, with 2024-2025 showing a rebound in digital spending (Abroad VRK, n.d.).

The official report Cultural and Creative Industries in 2023 (2025) identifies 124.1 thousand enterprises (99.1% – micro) and employment of approximately 236.7 thousand people, average gross monthly salary in the sector PLN 8,868. These figures reflect the quantitative and organisational maturity of Poland's sector. Recent analytical reports (PAIH / CRPK / Creative Tech) highlight the strength of Poland's gaming industry, AR/VR and creative-tech startups in Poland as drivers of creative services export in Central and Eastern Europe (Poland. Business Forward, n.d.). Findings from UNESCO (2025), Lviv Media Forum (n.d.), and other monitoring studies confirm the central role of digital platforms and social networks as channels for distribution and monetisation. At the same time, they emphasise the urgent need for capital investment, cybersecurity measures, and education (media literacy, digital skills) (Nielsen, n.d.). The comparative summary of key indicators in the digital media is presented in Table 9.

Table 9. Comparison of key indicators (selected area: digital media)

Indicator	Ukraine (sources 2023-2025)	Poland (sources 2023-2025)
Internet penetration (latest public data)	79.2% (29.64 million users, early 2024)	89.8% (34.5 million users, early 2025)
Active social media users	24.3 million (64.9% of population, early 2024)	29.0 million (75.6% of population, early 2025)
Digital advertising market size (2023; local currency)	USD 874.8 million digital (as part of total ad spending of USD 1,115.1 million in 2023)	PLN 7.8 billion
Share of digital in advertising mix	2023: 78% digital (based on 2023 expenditure structure)	High digital share; IAB data shows Internet dominance in 2023-2024 market growth
Number of enterprises in cultural and creative industries (CCIs)	Data for Ukraine remain fragmented (national classification and statistics disrupted due to wartime conditions). Available evidence indicates a strong export of IT services (share of export of creative services in 2022 was high) and numerous small media/startups	124.1 thousand enterprises in the CCI sector (2023), 99.1% of which are micro-enterprises; employment 236.7 thousand people
Basic risks	War/security; damaged infrastructure; partial dependence of media outlets on donor funding; instability of the advertising market in affected regions	Competition, necessity of internationalisation, regulatory and GDPR-requirements, investment needs for large-scale export-oriented projects

Source: compiled by the authors based on Poland. Business Forward (n.d.), IAB Polska (2024), S. Kemp (2024), I. Horbas & K. Koshel (2024), UNESCO (2025), Abroad VRK (n.d.)

The conducted analysis and comparative characterisation of the digital media landscape indicators in Ukraine and Poland (Table 9) allow for the formulation of several critical conclusions regarding the current state and development prospects of creative industries under conditions of crisis and digital transformation. Despite the catastrophic consequences of the full-scale invasion – specifically the loss of up to 95% of advertising revenue among regional media and total sector losses requiring annual investments of USD 120-150 million – the Ukrainian media space demonstrates high digital viability. An internet penetration rate of 79.2% and the dominance of digital advertising (accounting for 78% of the advertising expenditure structure in 2023) indicate that digital platforms have become the definitive channel for maintaining informational resilience. Benchmarking against the Polish model reveals a gap in institutional maturity and economic scale. The Polish market, with an internet penetration rate of nearly 90% and a structured Cultural and Creative Industries (CCI) sector comprising over 124,000 enterprises, serves as a regional benchmark for successful integration into the EU Digital Single Market. Conversely, while the Ukrainian market trails in quantitative indicators and stability, it exhibits a unique recovery dynamic in digital spending throughout 2024-2025. While the key challenges for Poland include regulatory requirements (GDPR), international competition, and the necessity for internationalisation, Ukraine's priorities remain within the realm of physical survival and security: infrastructural restoration, cybersecurity, and overcoming critical dependence on donor funding. The gathered data confirms that the strategic recovery of the Ukrainian creative sector must be based not only on emergency aid but also on a systemic transition toward long-term investments in "creative-tech", digital literacy, and the scaling of successful media project case studies. In summary, the Polish experience in the institutionalisation and commercialisation of creative industries can be partially adapted in Ukraine to form a roadmap for post-crisis recovery, with a particular emphasis on supporting micro-entrepreneurship and the digital resilience of regional media.

The results obtained within the framework of the present study indicate that the transformation of Ukraine's media creative industries is driven by three key groups of factors: the digitalisation of business processes, wartime challenges, and the integration of innovative technologies, particularly Artificial Intelligence (AI). The findings establish that the most resilient media entities are those that combine content platformisation, diversification of revenue streams, and the development of digital competencies among personnel. A comparison of these results with the findings of other researchers allows for a deeper interpretation of the identified trends. Research conducted by K. Pletsan (2021) proves that digital platforms shape a new model of cultural production, where the audience becomes an active co-creator of content. Her conclusions correlate with the results of the present study, which also evidence increased interactivity and a shift in media toward personalised digital experiences. At the same time, the study further establishes that under wartime conditions, interactivity also serves a mobilisation function, enhancing audience trust and engagement.

V. Bakalchuk (2023) emphasised the high adaptability of creative industries due to flexible forms of employment. The current results support this thesis but refine it: flexibility proves effective only in the presence of digital infrastructure and skills for remote team coordination. Without investment in digital tools, flexibility alone does not guarantee resilience. Researchers I. Bereziuk-Rybak *et al*. (2023) highlight the role of creative industries as a driver of the innovation economy, focusing on the macroeconomic potential of the sector. The present study complements this approach with a micro-level analysis, demonstrating that the media segment ensures the fastest adaptation through digital business models, yet remains highly dependent on grant funding. O. Oliinyk (2023) examined the integration of artificial intelligence into creative processes, pointing to increased efficiency in analytics and personalisation. The findings partially confirm these conclusions: AI tools indeed accelerate data processing and content creation. However, the study shows that their use in Ukrainian media remains fragmentary, hindered by a lack of financial resources and regulatory frameworks. I. Dulska (2024) substantiates that digitalisation is a prerequisite for the survival of the creative sector during wartime. The current findings extend this assertion, demonstrating that digitalisation not only ensures survival but also creates the conditions for entering international markets through online distribution and partner platforms.

N. Stoliarchuk (2024) emphasised the need for a balance between economic efficiency and the cultural value of the product. This study confirms that an exclusive focus on commercialisation diminishes audience trust, especially in a wartime context where demand for socially responsible content increases. Thus, while the present results align with the researcher's position, they emphasise a stronger influence of the security factor. S. Kucherenko & Y. Kostyk (2025) establish that digital marketing alters the revenue structure of the publishing sector, strengthening the role of social networks. The study demonstrates a similar trend in the media segment but also identifies the risk of algorithmic dependence on global platforms, which may limit editorial autonomy. In the article by L. Bezuhla & I. Lazakovych (2024), creative industries are viewed as a component of national economic security and a factor in forming the state's cultural resilience amidst wartime transformations. The authors focus on the need for systematic state support, the development of cluster models, and integration into the international cultural and economic space. Their conclusions correlate with the present findings regarding the importance of digitalisation and international integration for strengthening the position of Ukrainian media. At the same time, the present study complements the macroeconomic and politico-institutional perspective with a micro-level analysis of the media segment, showing that digital business models, platformisation, and flexible work formats provide rapid adaptation in crisis conditions. The research of S. Galyuk (2024) focuses on the transformation of creative industries within the digital economy, specifically the roles of innovation, digital competencies, and entrepreneurial culture. The author emphasises that digitalisation not only changes production processes but also shapes a new logic of interaction between content producers and consumers. These points align with the current findings regarding increased interactivity, personalisation, and platform-based distribution. However, the findings specify that under wartime conditions, digital transformations acquire an additional security and mobilisation dimension, and their effectiveness largely depends on access to financial resources and international support.

Thus, a comparative analysis of these contemporary studies demonstrates general alignment between the present results and current scientific approaches to the development of creative industries. Simultaneously, the data obtained allow for the refinement of several points: first, digitalisation in the Ukrainian media sector has a security dimension alongside its economic one; second, AI integration is in its nascent stages; and third, the grant-based funding model simultaneously supports and structurally transforms the sector. This expands existing scholarly approaches and forms a foundation for further interdisciplinary research.

Conclusions

The full-scale war has caused significant problems for Ukrainian media, as one of the components of the creative industries. Thus, about 28% of media have suspended their activities, the potential losses of the media sector are estimated at hundreds of millions of dollars, which requires long-term recovery. The film subsector has suffered the greatest decline, while the publishing sector has demonstrated relative stability by 2023. As the studies show, the locomotive of recovery is digital media. Namely: the share of online spending and the possibility of exporting digital services is growing, but this requires investments in competencies, infrastructure and legal support. The implementation of the measures proposed in the study: targeted investments, tax incentives, education, digital platforms, copyright protection can accelerate recovery and increase the resilience of the media component of the creative industries. It should also be said that long-term media recovery in Ukraine requires targeted funding, but the proposed project grants will not be enough; a combination of public investment, donor support, and private investment is needed to develop digital infrastructure.

The growing role of online media and increasing media literacy of both journalists and consumers of journalistic products are a prerequisite for the development of creative industries in the media of Ukraine. Investments in the educational process of journalists will contribute to the formation of their digital skills, which will influence the production of high-quality content for the media, social networks, and digital platforms. The media component of creative industries in Ukraine is showing significant growth thanks to digital technologies, platforms and social networks, but this development is hampered by weak legislative regulation, insufficient digital competence and limited access to resources. To stimulate further development, it is necessary to update the regulatory framework, which would clearly define the concept, areas and support of media creative industries. Education and training of media content creators require a comprehensive approach: digital skills, marketing, monetisation, use of platforms and technologies. Policy strategies should take into account grant programmes, state and international support, stimulation of innovations, cooperation with technology companies.

In conclusion, it should be noted that Ukraine is focused on: scaling commercial solutions: to use high digital activity for launching internal payment/subscription solutions, local AVOD/podcast projects and advertising products that will keep revenue in the country (reducing budget "leakage" to global platforms); investments in cybersecurity, backup and resilient infrastructure, this is a priority for Ukrainian editorial offices. Poland focuses on: exporting content and globalisation of business models (use strong domestic advertising markets and developed infrastructure for CEE/Western markets); accurate metrics for further analysis. Recent studies (2023-2025) indicate that the digital transformation of media remains the main driver of the recovery and development of creative industries in both countries, although the scale and structural characteristics of the markets differ.

The study of creative industries' development in the Ukrainian media sector during 2022-2025 reveals a distinct convergence of crisis-driven challenges and emerging digital opportunities. While traditional media formats have sustained substantial losses, the digital segment has established itself as the primary catalyst for transformation. Future research efforts should prioritise the analysis of the export potential of Ukrainian creative services, the evaluation of state and international support programmes, and the continuous monitoring of localised empirical data, including media business models, AI impact, and the geographical mapping of media recovery and content export across Ukraine and Poland.

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Розвиток креативних індустрій у медіа в умовах цифрового середовища

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Анотація. Актуальність дослідження полягає у трансформації медійної частини креативних індустрій під впливом цифрових технологій та масштабних суспільно-політичних потрясінь (повномасштабна війна, економічні шоки), що радикально змінили механізми виробництва, розповсюдження та монетизації медіаконтенту. Метою дослідження було проаналізувати тенденції розвитку медійних креативних індустрій в Україні в період 2022-2025 років, оцінити економічні втрати й потреби на відновлення, виявити ключові бар'єри та запропонувати цільові політики для посилення сектору. Серед методів, які були використані у дослідженні: системний аналіз національних і міжнародних звітів, контент-аналіз наукових публікацій та галузевих даних, порівняльний аналіз підсекторів (кіно, видавництво, реклама, онлайн-медіа), аналіз статистичних даних, а також синтез висновків досліджень Lviv Media Forum і UNESCO. Отримані результати показали, що війна спричинила значний шок для галузі: близько 28 % медіа призупинили діяльність, а потенційні втрати сектору сягають сотень мільйонів доларів. Незважаючи на те, що видавнича галузь демонструє певну стійкість, рекламні бюджети переорієнтувалися на цифрові платформи. У результаті дослідження встановлено, що українські медіа зазнали значних втрат у 2022-2025 роках, проте водночас відбулося зростання цифрового сегмента, збільшення на ринку частки онлайн-медіа, а також підвищення рівня медіаграмотності населення. Практична цінність дослідження полягає у формуванні рекомендацій щодо стійкого розвитку креативних індустрій у медіа, зокрема у напрямах цифровізації, залучення інвестицій та інтеграції в європейський культурний простір. Також практична цінність дослідження полягає у розробленні конкретних заходів, а саме: програми підвищення цифрової компетентності, податкових стимулів для медіаекспортних проєктів, моделюванні гібридного фінансування для кіно та видавництва, які можуть бути використані урядом, донорами та учасниками ринку

Ключові слова: комунікації; культурні індустрії; штучний інтелект; цифрові медіа; цифровізація; творча діяльність