

ANNUAL SURVEY REPORT: UKRAINE

2nd Wave (Spring 2017)

**OPEN Neighbourhood —
Communicating for a stronger partnership:
connecting with citizens across the Eastern
Neighbourhood**

June 2017

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*The surveys have been carried out in the six Eastern Partner countries by ACT
LLC and their network partners*

1. Background

Between March and May 2017, a second wave of annual surveys was carried out across the six Eastern Partner countries (Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine). The research was conducted within the framework of the EU-funded “OPEN Neighbourhood — Communicating for a stronger partnership: connecting with citizens across the Eastern Neighbourhood” (‘**EU NEIGHBOURS east**’) project.

The ‘**EU NEIGHBOURS east**’ project aims to increase the understanding of EU support in the Eastern Partner (EaP) countries through improved communication. The **overall objective** of the project is to contribute to the improvement of public perception of the EU, as well as to a better understanding of European policies and their impact through the regional and bilateral EU support and cooperation programmes in Eastern Partner countries.

The project develops information and communication materials, carries out awareness-raising and information campaigns and assesses the perception of the EU and its support through opinion polling and media monitoring.

As part of the opinion polling strategy, the purpose of the annual surveys is to investigate the opinion and the level of information that citizens of the EaP countries have about the EU in general and, in particular, about EU-funded cooperation and development programmes/projects. In order to monitor changes over time, the surveys are being carried out annually from 2016 until 2019.

This document presents the results of the **Annual Survey – 2nd wave** (Spring 2017) conducted in **Ukraine**¹ and covers the following broad topics:

- General perceptions about the EU
- Values associated with the EU
- Assessment of EU relations with Ukraine
- Awareness of financial support provided by the EU and assessment of its effectiveness
- Sources of information
- Country evaluation and future expectations

Alongside an analysis of the results of the 2nd wave of the survey, this document provides a comparison between the findings of the 2016 and 2017 surveys where relevant.

¹ A similar report has been produced for each EaP country. Additionally, a macro-area report is being prepared that will compare the results across the region.

2. Research methodology in brief

The survey was conducted in April 2017, following the same methodology adopted in the previous round of data collection (Spring 2016). 1,000 face-to-face interviews were carried out and respondents were randomly selected according to the sampling strategy described below. In order to estimate the characteristics of the target population (i.e. general population aged 15 and over and living in the country), the sampling weights were calculated by applying a specifically designed estimation procedure.

Sampling strategy

The survey used a two-stage sample design with settlements as primary sampling units (PSUs) and individuals as secondary units.

In the first stage, the sample was composed of 30 units (cities/towns) and it was stratified by unit size, expressed in terms of population and level of urbanisation, and geographical area. Three groups of settlements² and three areas³ were used for a total of nine strata. Within each stratum, three or four sample units were randomly selected, with the probability of their selection proportional to their size. A compromise between an equal allocation and a proportional allocation was applied in order to distribute the secondary sampling units (1,000 individuals) by strata. In each selected settlement, a minimum of 20 interviews were carried out. The additional interviews that were carried out were distributed proportionally to the PSU's size.

The second-stage sample was also stratified. In this case, gender and age⁴ were considered for a total of six strata. In each selected settlement, secondary sampling units were distributed proportionally among strata.

The individuals to be interviewed were selected randomly, according to the random walk⁵ principle.

Estimation phase

An estimation procedure was carried out in order to estimate the characteristics of the target population from the survey respondents. The technique used for the construction of the survey estimator (i.e. sampling weights) was based on the predictive approach to regression estimator. In particular, a calibration estimator was built based on the general category of model-assisted estimators (Deville and Särndal 1992). The procedure included the computation of a sampling design weight for each sampled respondent by calculating the inclusion probability of both primary and secondary sampling units (i.e. settlements and individuals) and the calibration of the sampling design weights to known population totals. Three new calibration variables (education level, religious faith and mother tongue) were added to those used in the previous wave (settlement size, gender, age, employment status and geographical area) to produce calibrated weights, and therefore to improve the quality of survey findings, as they allowed for a better correction of any selection bias. Nevertheless, it is worth mentioning that the introduction of additional auxiliary variables in the estimation procedure could occasionally explain part of the difference between the estimates of the two years.

² Groups of settlements: 1) Small settlements (less than 20,000 inhabitants); 2) Medium-sized settlements (20,000-150,000 inhabitants); 3) Large settlements (above 150,000 inhabitants).

³ Geographical areas: 1) Centre (Sumy, Mykolaiv, Kosiv, Odesa, Kropyvnytskyi, Cherkasy); 2) East (Dnipro, Zaporizhia, Donetsk, Kherson); 3) West (Volynsk, Lviv, Khmelnytskyi, Zakarpatska, Zhytomyr, Ivano-Frankivsk, Vinnytsia).

⁴ Age groups: 1) 15-34 years; 2) 35-54 years; 3) 55 or more years.

⁵ This technique is based on very precise instructions for the interviewers. First, a starting point should be selected for each cluster. Second, it is necessary to define a step. A step can be defined according to the size of the cluster. The third important consideration is the movement route. Each interviewer should have detailed instructions on how to follow the route in rural settlements and urban areas. Each interviewer should begin from the starting point, according to the predefined step size and route, and contact a total predefined number of households.

3. Survey findings

3.1. Executive summary

General perceptions about the EU

- As in 2016, the image of the European Union among Ukrainian citizens is generally positive or at least neutral – 43% have a very or fairly positive image of the EU, while 35% feel neutral about it. Even though the shares of fairly positive and neutral attitudes have not changed much compared to last year, it is worth mentioning that the share of very positive attitudes has fallen by six percentage points.
- Overall, more than 70% of Ukrainians who have heard about/know the EU strongly believe that the EU represents values such as human rights, economic prosperity, rule of law, freedom of religion, freedom of speech and individual freedom. Slightly fewer people, but still the majority, associate the EU with such values as media freedom (70%), respect for other cultures (69%), democracy (67%), and equality and social justice (67%).
- The European Union is still the most trusted (58%) foreign organisation in Ukraine, followed by the United Nations (51%) and NATO (46%). The share of those who trust the Eurasian Economic Union is 19%, meaning this institution remains the least trusted one for the second year in a row.

EU relations with Ukraine and awareness of EU financial support

- In general, Ukrainians' perception of their country's relations with the EU has not changed much since 2016. The proportion of people who describe Ukraine's relationship with the European Union as fairly or very good remains at almost the same level (58%), with just 16% of the population describing their country's relations with the EU as either fairly bad or very bad. The share of those who believe that the country does not have any relations with the EU is 9%, while 17% find it difficult to answer this question.
- 56% of Ukrainians are well aware of the financial support provided by the EU to their country and, among them, 36% consider it to be effective, or very effective, as in 2016. The share of those who deem the support ineffective has decreased slightly (from 57% to 51%), thanks to the significant reduction of Ukrainians perceiving financial support as not effective at all (-10%).
- Almost one in three Ukrainians who are aware of the EU's financial support know about specific EU-funded programmes in Ukraine. The most well-known EU-financed programmes in Ukraine are economic reforms/business promotion (43%), education programmes (33%) and cultural programmes (30%).
- A significant share of people – ranging from 24% to 34% – are not sufficiently informed to compare the support provided by the EU to that provided by other institutions, such as the International Monetary Fund (IMF)/World Bank (WB), the United States of America, the United Nations and its agencies, and the Russian Federation. In general, the Russian Federation is recognised as the worst donor (65% of Ukrainians think that Russia provides less support than the EU), while one in three citizens (33%) believe that the International Monetary Fund/World Bank is a larger contributor of financial support than the EU.

- Respondents believe that tourism (37%), access to more products and services (37%) and improved trade (33%) are among the greatest benefits from EU support. Ukrainians believe that the fight against corruption is the field that has least benefitted from EU support.
- As for the areas where they want greater EU involvement, more than half of the population (65%) believes economic development to be the number-one priority. Almost half (49%) of people in Ukraine also believe that the EU should help more in fighting corruption and that EU support should be more focused on creating greater employment opportunities (40%).

Attitudes towards the EU: a snapshot

- Individuals who have a positive image of the EU are also more likely to be positively oriented for the indicators analysed in the scope of the study: the level of trust towards the EU, the relationship between Ukraine and the EU, awareness of EU financial support, and effectiveness of EU support. In particular, 90% of those who have a positive attitude also tend to trust the EU, compared to less than half of those who are mostly neutral (48%).
- The top three values which Ukrainians who have a positive image of the EU tend to strongly and very strongly link with the Union are individual freedom, human rights and rule of law. Neutrally oriented citizens mostly associate the EU with similar values, although economic prosperity seems to be more important when compared to individual freedom in the top three choices of people with a positive image of the EU.
- Both positively and neutrally oriented individuals believe the European Union has very much or fairly enhanced access to more products, encouraged tourism and improved trade.

Media usage as sources of information

- Television and word of mouth are the most popular types of media in Ukraine, used by the vast majority of people (93% and 92% respectively), albeit with different frequencies. Internet, print and social media are used by nearly half of the population. The radio appears to be relatively less popular among the population (41%). As for the official EU website – it is never used by 86% of Ukrainians.
- The vast majority of Ukrainians (30% always, 35% often and 28% sometimes) rely on Ukrainian-language media, followed by Ukrainian media in Russian (15% always, 28% often and 32% sometimes).

Sources of information about the EU

- 63% of Ukrainians claimed to have seen or heard about the European Union in the last three months, as compared to 78% in 2016. Most of the information about the EU recently obtained by people came from television (79%). Nearly one third of Ukrainians heard or saw information about the EU through the internet and one quarter through word of mouth.
- More than half of the population in Ukraine felt that the national media represented the European Union very positively (13%) or fairly positively (42%), with no substantial changes compared to last year. Only 4% of the population think that the image of the EU in the national media is fairly or very negative.
- According to half of Ukrainians, the information they read, watch or access online helps them to have a better understanding of the European Union. One third of people disagrees with this notion and thinks that the information does not help them to better understand the EU.

- Information on the European Union is accessed frequently or very frequently by only 11% of Ukrainians, while a majority of them (61%) never look for/access information on the EU, a situation that has not changed since 2016 in this regard.
- 43% of Ukrainians among those who search for information about the EU access it in their national language, while half (more than 50%) prefer to find EU-related information in Russian.
- While passive exposure to information about the EU mostly stems from television (79%) and to an extent from the internet (29%) and word of mouth (26%), those actively searching/accessing information still rely on television channels (64%), followed by the internet (50%) and social media (28%).

Sources of information and attitude towards the EU

- Almost twice as many people among social media and internet users have a positive perception of the EU compared to those who rely on traditional media (59% vs. 35%). Likewise, a higher proportion of people among social media and internet users are more likely to trust the EU, assess the relationship between the EU and Ukraine positively, be aware of EU financial support to their country and be satisfied with the effectiveness of the EU's financial support to Ukraine, compared to those who use only traditional media. The lowest proportion of people who think that financial support from the EU to Ukraine is effective is observed among traditional media users (27%), while about 44% among social media and internet users rate the EU's support as effective.
- The majority of people, regardless of whether they frequently access media in Russian or not, tend to trust the EU and consider the relationship between the EU and Ukraine to be positive. In addition, more than 55% of Ukrainians from both groups tend to be aware of the EU's financial support to Ukraine but considerably more people among Russian media users are positively disposed towards the EU and trust in the effectiveness of EU support to Ukraine, compared to those who do not use media in Russian (49% vs. 39% and 43% vs. 29% respectively)⁶.

View of Ukraine's current situation

- Just as in 2016, Ukrainians do not have a great deal of trust in national, regional and local institutions. Regional and local public authorities are one of the most trusted institutions, favoured by a third of Ukrainians, while less than 10% of the population trust the other institutions. Religious authority, a new variable introduced in 2017, appears to be the most trusted institution in Ukraine (51%).
- When it comes to the current situation in Ukraine in terms of democracy, although there has been a decrease in the share of those who state they are not at all satisfied (-9 per cent) since 2016, nearly a third of Ukrainians remain completely dissatisfied with the way democracy works in their country. Total dissatisfaction has decreased from 38% to 29% since last year, while the share of satisfied (very and fairly) and fairly dissatisfied citizens has overall remained stable (15% and 42% respectively).
- Nearly half of the population in Ukraine believe that gender equality applies in their country, followed by freedom of speech (36%), freedom of media (34%) and protection of the rights of minorities (25%). Respect for human rights, rule of law, equality and social justice, good governance, independence of the judiciary, lack of corruption and free & fair elections, on the other hand, were assessed as problematic by the majority of the population (proportions varied between 70% and 95% for different aspects on the list).

⁶ This should not be taken as evidence that Russian speakers or the Russian media are more positively disposed to the EU. Approximately two thirds of the print media in Ukraine are published in the Russian language, including the most influential weeklies, which are read by the educated, urban middle class. As noted above, those persons positively disposed to the EU are likely to have higher education, use the internet and be urban dwellers.

Future expectations

- Ukrainians generally seem to be slightly more optimistic towards their own future (46%) compared to the future of their country (41%). In both cases, the degree of optimism expressed by Ukrainians has slightly increased compared to last year (34% in 2016 vs. 41% in 2017 for Ukraine's future; 42% in 2016 vs. 46% in 2017 for their personal future).
- The most pressing problems in Ukraine are corruption (45%), unemployment (37%), low living standards and poverty (37%), security issues/war (37%), followed by economic crisis (35%) and low salaries and pensions (33%).

Views of the country and attitude towards the EU

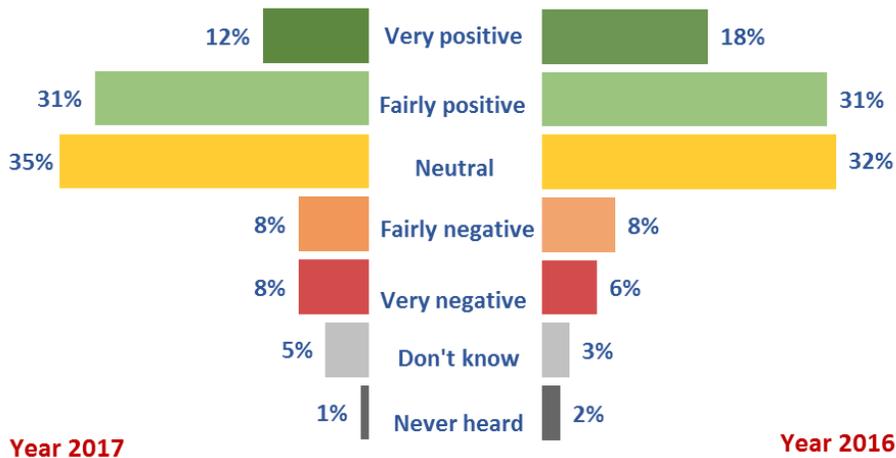
- The first thing that should be noted is that, unsurprisingly, individuals who have a positive image of the EU are also more likely to be more positively oriented for all the assessed indicators (in comparison to the neutral population): trust in the government, trust in the parliament, trust in regional and local authorities, trust in political parties, trust in religious authority, satisfaction with the functioning of democracy, optimism about their country's future and optimism about their personal future.
- The gap between the two populations tends to shrink when it comes to trust in the parliament, government and political parties (between 2 and 5 per cent) and reaches its maximum when it comes to the level of optimism about their country's future (26 per cent) and their personal future (22 per cent).
- The majority of Ukrainians, regardless of their attitude towards the European Union (positive or neutral), indicated the same pressing problems in Ukraine, with corruption (47%), unemployment (36% – 37%) and the economic crisis (34% of people with a positive image of the EU and 42% of neutrally oriented people) being the top three priority issues for the country.

3.2. Perceptions of the European Union

3.2.1. General perceptions of the EU

As in 2016, the image of the European Union among Ukrainian citizens is generally positive or at least neutral (fig. 1) – 43% have a very or fairly positive image of the EU, while 35% feel neutral about it. Even though the shares of fairly positive and neutral attitudes have not changed much compared to last year, it is worth mentioning that the share of very positive attitudes has fallen by six per cent.

FIGURE 1 – Do you have a very positive, fairly positive, neutral, fairly negative or very negative image of the European Union? (Q2.1)



Attitudes towards the EU are different among men and women. A larger share of men (50%) seem to have positive attitudes towards the EU, compared to women (38%). It is also worth mentioning that people aged 55 or over lean towards more neutral or negative attitudes, compared to people aged 54 or under. Employment status also seems to be connected to attitudes towards the EU, with a larger share of unemployed people (18%) having negative attitudes towards the EU than those employed or self-employed (9%); 55% of employed and self-employed people have positive attitudes towards the EU, compared to 40% of unemployed people. Geographical area also seems to influence attitudes towards the EU, as a smaller share of people residing in central parts of the country express positive attitudes towards the EU than those in eastern and western parts of Ukraine; the most positive attitudes are observed in the western part of the country and among those residing in medium-sized settlements. Level of education seems to affect the attitudes towards the EU as well, as only 25% of people with higher education qualifications express neutral attitudes, while the share of people with a low or medium level of education who take a neutral position is 43%. Additionally, Ukrainian speakers are more negatively oriented than Russian speakers (23% vs. 14%).

TABLE 1 – Perception of the EU

Q2.1. Do you have a very positive, fairly positive, neutral, fairly negative or very negative image of the European Union?						
		Positive	Neutral	Negative	Don't know / Never heard	Total
Settlement size	Equal to or more than 150,000 inhabitants	48%	30%	17%	5%	100%
	Between 20,000 and 150,000 inhabitants	37%	48%	14%	1%	100%
	Less than 20,000 inhabitants	41%	34%	16%	9%	100%
Gender	Male	50%	31%	14%	5%	100%
	Female	38%	38%	18%	6%	100%
Age group	15-34 years	50%	29%	11%	10%	100%
	35-54 years	52%	33%	14%	1%	100%
	55 years & above	29%	43%	24%	4%	100%
Education level	Low/Medium level	35%	43%	15%	7%	100%
	High level	53%	25%	18%	4%	100%
Employment status	Employed / Self-employed	55%	33%	9%	3%	100%
	Unemployed or temporarily not working / inactive	40%	35%	18%	7%	100%
Mother tongue	Ukrainian	44%	35%	14%	7%	100%
	Russian	41%	35%	23%	1%	100%
Geographical area	Centre	32%	38%	25%	5%	100%
	East	41%	39%	16%	4%	100%
	West	57%	28%	7%	8%	100%
Total		43%	35%	16%	6%	100%

Ukrainians who have heard about/know the EU strongly believe that the EU represents values such as human rights, economic prosperity, rule of law, freedom of religion, freedom of speech and individual freedom. Overall, more than 70% of people share the aforementioned beliefs. Slightly fewer people, but still a majority, are convinced that the EU represents such values as media freedom (70%), respect for other cultures (69%), democracy (67%), equality and social justice (67%) (tab. 2).

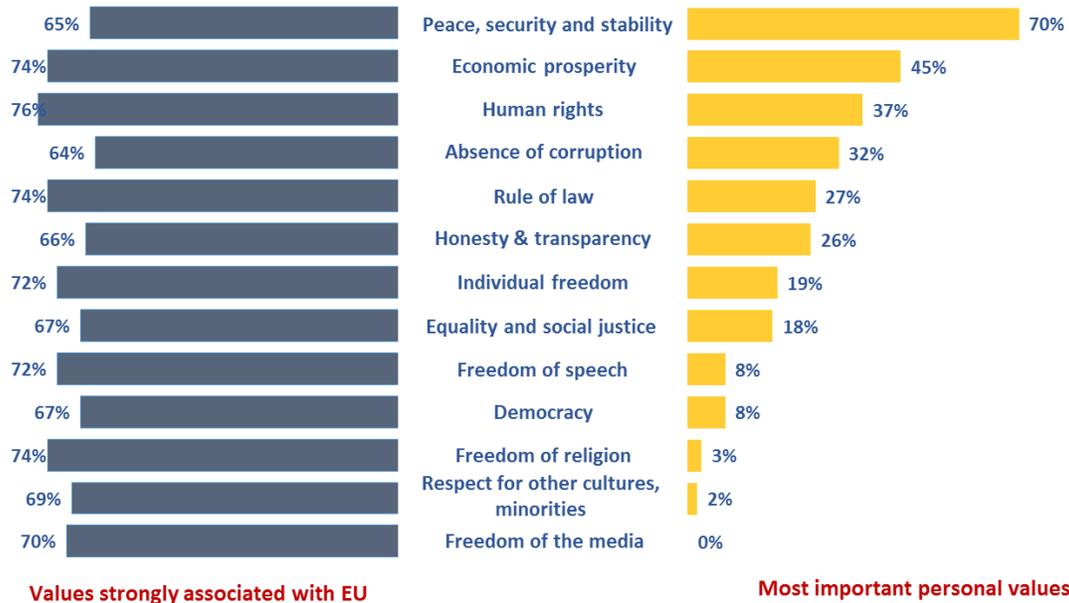
TABLE 2 – Values associated with the EU

Q2.3. To what extent does the European Union represent the following values for you?						
	Very strong	Strong	Weak	Very weak	Don't know	Total
Human rights	28%	48%	11%	5%	8%	100%
Economic prosperity	29%	45%	14%	6%	6%	100%
Rule of law	24%	50%	9%	7%	10%	100%
Freedom of religion	24%	50%	10%	5%	11%	100%
Freedom of speech	25%	47%	14%	5%	9%	100%
Individual freedom	25%	47%	12%	6%	10%	100%
Freedom of the media	23%	47%	13%	4%	13%	100%
Respect for other cultures	23%	46%	13%	6%	12%	100%
Democracy	26%	41%	14%	6%	13%	100%
Equality and social justice	20%	47%	15%	7%	11%	100%
Honesty and transparency	21%	45%	15%	7%	12%	100%
Peace, security and stability	24%	41%	19%	7%	9%	100%
Absence of corruption	20%	44%	16%	8%	12%	100%

Percentages refer to Ukrainians who have heard about the EU

Figure 2 compares the values that are strongly associated with the EU with the most important personal values for Ukrainians⁷. Peace, security and stability, economic prosperity and human rights are the three most important values for Ukrainians, of which economic prosperity and human rights are the ones that are also strongly associated with the EU, although association of the EU with peace, security and stability is not as strong as with other values, such as rule of law, individual freedom, freedom of speech and freedom of religion.

FIGURE 2 – Values strongly or very strongly associated with the EU (Q2.3) & Three most important personal values (Q4.7)



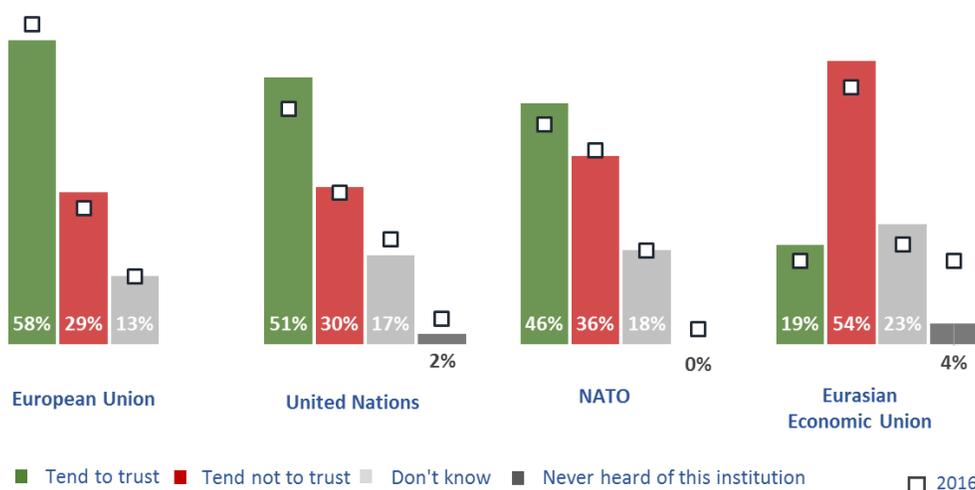
Percentages refer to Ukrainians who have heard about the EU

Perceptions of the EU were also assessed through an open-ended question in which respondents were asked to name the first issues that came to their mind when thinking of the EU. 20% of Ukrainians spontaneously associated the EU with economic prosperity/high standard of living. European integration and visa liberalisation were also named as associated aspects. Finally, it should be noted that almost a third (32%) of citizens did not answer the question, either because it was too hard to answer or because they had nothing to say.

The European Union is still the most trusted foreign institution in Ukraine. 58% of Ukrainian citizens tend to trust the EU, followed by the United Nations (51%) and NATO (46%) (fig.3). The share of those who trust the Eurasian Economic Union is 19%, meaning this institution remains the least trusted institution among the four for the second year in a row. It is also worth mentioning that, while the awareness level of the Eurasian Economic Union was 84% in 2016, it has increased to 96% in 2017.

⁷ Respondents were asked to choose and rank the three most important personal values from a list of 13 items.

FIGURE 3 – Trust towards different institutions (Q2.11)



Percentages refer to Ukrainians who have heard about the EU

The level of trust in the European Union decreases with age: only 46% of people aged 55 or over trust the EU, compared to 64% of people aged 15-54. The European Union is also particularly trusted by employed/self-employed people (66%), residents of medium-sized cities (69%), and those in the western part of the country (72%) (tab. 3). The share of those who find it difficult to decide whether to trust the UE or not is about three times higher among Ukrainian speakers than Russian speakers (16% vs. 5%).

TABLE 3 – Trust towards the European Union

Q2.11. I would like to ask you a question about how much trust you have in the EU		Tend to trust	Tend not to trust	Don't know	Total
The European Union					
Settlement size	Equal to or more than 150,000 inhabitants	52%	34%	14%	100%
	Between 20,000 and 150,000 inhabitants	69%	23%	8%	100%
	Less than 20,000 inhabitants	59%	27%	14%	100%
Gender	Male	60%	26%	14%	100%
	Female	56%	31%	13%	100%
Age group	15-34 years	64%	23%	13%	100%
	35-54 years	64%	27%	9%	100%
	55 years & above	46%	38%	16%	100%
Education level	Low/Medium level	58%	27%	15%	100%
	High level	57%	31%	12%	100%
Employment status	Employed / Self-employed	66%	25%	9%	100%
	Unemployed or temporarily not working / inactive	56%	30%	14%	100%
Mother tongue	Ukrainian	58%	26%	16%	100%
	Russian	55%	40%	5%	100%
Geographical area	Centre	41%	41%	18%	100%
	East	61%	32%	7%	100%
	West	72%	14%	14%	100%
Total		58%	29%	13%	100%

Percentages refer to Ukrainians who have heard about the EU

3.2.2. EU relations with Ukraine and awareness of EU financial support

In general, Ukrainians' perceptions of their country's relations with the EU have not changed much since 2016. The proportion of people who describe Ukraine's relationship with the European Union as fairly or very good remains at almost the same level (58% vs. 61% in 2016), while 16% of the population think that their country's relations with the EU are either fairly bad or very bad. The share of those who believe that the country does not have any relations with the EU is 9%, and 17% find it difficult to answer this question.

FIGURE 4 – In general, how would you describe the relations that the European Union has with your country? (Q2.4)



Percentages refer to Ukrainians who have heard about the EU

Similarly, in terms of trust towards the EU, medium-sized cities tend to believe that the EU has good relations with their country (71%) (tab. 4). The younger the age, the more positive is the attitude towards the relations of the EU with the country, while conversely only 23% of people aged 55 or over describe EU relations with the country as 'bad'. Employment status seems to affect attitudes as well, since a larger share of employed/self-employed people say the EU has good relations with Ukraine.

Finally, Russian speakers are more sceptical of the relations of Ukraine with the EU as 24% of them think that relations are bad, compared to 14% of Ukrainian speakers.

TABLE 4 – Relations between the EU and Ukraine

Q2.4. In general, how would you describe the relations that the European Union has with Ukraine?					
		Good	Bad	Don't know/No relations	Total
Settlement size	Equal to or more than 150,000 inhabitants	50%	16%	34%	100%
	Between 20,000 and 150,000 inhabitants	71%	18%	11%	100%
	Less than 20,000 inhabitants	60%	17%	23%	100%
Gender	Male	61%	16%	23%	100%
	Female	56%	17%	27%	100%
Age group	15-34 years	69%	11%	21%	100%
	35-54 years	58%	17%	26%	100%
	55 years & above	48%	23%	29%	100%
Education level	Low/Medium level	58%	17%	25%	100%
	High level	58%	16%	26%	100%
Employment status	Employed / Self-employed	65%	17%	18%	100%
	Unemployed or temporarily not working / inactive	56%	16%	28%	100%
Mother tongue	Ukrainian	60%	14%	26%	100%
	Russian	53%	24%	23%	100%
Geographical area	Centre	45%	23%	32%	100%
	East	68%	16%	17%	100%
	West	63%	11%	26%	100%
Total		58%	16%	26%	100%

Percentages refer to Ukrainians who have heard about the EU

56% of Ukrainians are well aware of the financial support provided by the EU to their country (tab. 5). The number of people who are aware of the EU's financial support to Ukraine is lower among older people (51%) and the unemployed (53%), compared to other subgroups. 32% of people living in small cities and 40% from the centre of the country stated that they were not aware of the financial support provided by the EU to the country. It is worth mentioning that a quarter of citizens (26%) are not aware of this issue, which seems to have increased since 2016 (15%).

TABLE 5 – Provision of financial support by the EU

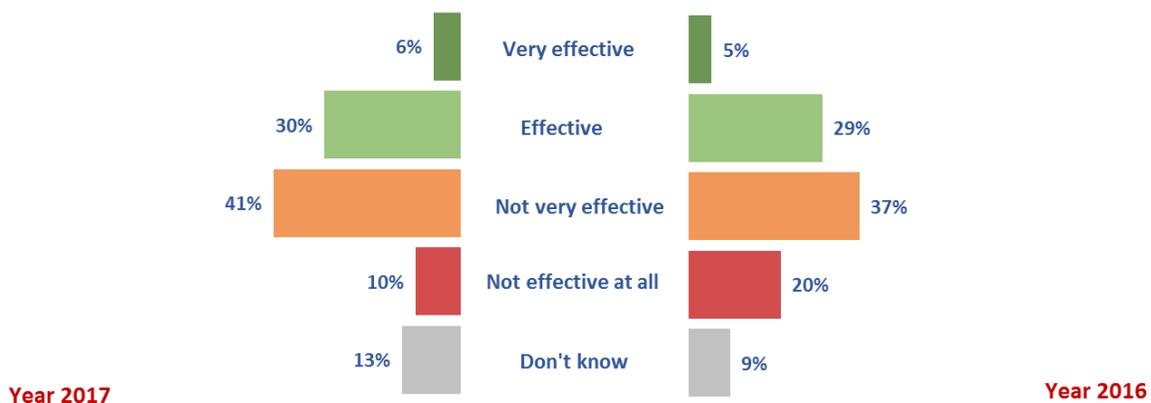
Q2.5. As far as you know, does the European Union provide Ukraine with financial support?		Yes	No	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	51%	17%	32%	100%
	Between 20,000 and 150,000 inhabitants	69%	22%	9%	100%
	Less than 20,000 inhabitants	56%	17%	27%	100%
Gender	Male	57%	16%	27%	100%
	Female	55%	20%	25%	100%
Age group	15-34 years	57%	15%	28%	100%
	35-54 years	61%	15%	24%	100%
	55 years & above	51%	23%	26%	100%
Education level	Low/Medium level	54%	18%	28%	100%
	High level	59%	18%	23%	100%
Employment status	Employed / Self-employed	67%	15%	18%	100%
	Unemployed or temporarily not working / inactive	53%	19%	28%	100%
Mother tongue	Ukrainian	55%	17%	28%	100%
	Russian	61%	21%	18%	100%
Geographical area	Centre	42%	18%	40%	100%
	East	70%	23%	7%	100%
	West	58%	13%	29%	100%
Total		56%	18%	26%	100%

Percentages refer to Ukrainians who have heard about the EU

A similar share of citizens find the financial support provided by the EU to be very effective or effective in 2017, as in 2016. In total, 36% of Ukrainians believe that the financial support is either very effective or effective, and 34% believed the same back in 2016. However, the share of those who believed that the financial support was not effective at all was down 10 per cent since 2016, as shown in the figure below (fig. 5).

Overall, 51% of people now think financial support is not effective (not very effective or not effective at all), compared to 57% in 2016.

FIGURE 5 – How effective do you think the support has been? (Q2.5.1)



Percentages refer to Ukrainians who were aware of the EU's financial support

Notably, the highest percentages of people who believe the financial support provided by the EU has been effective are young (44% of 15-34 year olds), with higher education (39%), employed (40%) and living in the central part of the country (40%) or east (37%) in medium-sized (40%) and large (38%) settlements (tab. 6). Even though those in medium-sized settlements are the most likely to feel that EU financial support is effective, they are also the most likely to see it as ineffective (59%), with only 1% saying they don't know. The other group that is particularly sceptical about the effectiveness of EU support is the over 55 age group (60%). More than half of women and people with Ukrainian as their mother tongue tend to believe that EU financial support is not effective.

TABLE 6 – Effectiveness of the support

Q2.5.1. How effective do you think the support has been?		Effective	Not effective	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	38%	45%	17%	100%
	Between 20,000 and 150,000 inhabitants	40%	59%	1%	100%
	Less than 20,000 inhabitants	32%	51%	17%	100%
Gender	Male	37%	45%	18%	100%
	Female	34%	55%	11%	100%
Age group	15-34 years	44%	38%	18%	100%
	35-54 years	32%	54%	14%	100%
	55 years & above	30%	60%	10%	100%
Education level	Low/Medium level	32%	53%	15%	100%
	High level	39%	48%	13%	100%
Employment status	Employed / Self-employed	40%	49%	11%	100%
	Unemployed or temporarily not working / inactive	34%	51%	15%	100%
Mother tongue	Ukrainian	32%	54%	14%	100%
	Russian	46%	43%	11%	100%
Geographical area	Centre	40%	42%	18%	100%
	East	37%	60%	3%	100%
	West	31%	47%	22%	100%
Total		36%	51%	13%	100%

Percentages refer to Ukrainians who were aware of the EU's financial support

Almost one in three Ukrainians aware of the EU's financial support know about specific EU-funded programmes in Ukraine (tab. 7). Gender, employment status, level of education and language seem to be closely linked to this kind of information. Males (37%), the employed (37%), those with higher education qualifications (43%) and those with Russian as their mother tongue (52%) appear to be the most informed about specific programmes funded by the EU in Ukraine.

TABLE 7 – Programmes financed by the EU

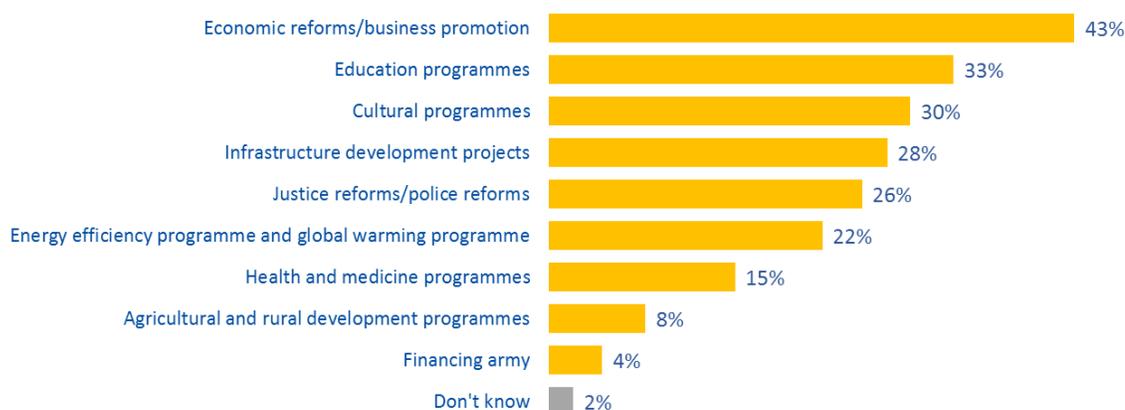
Q2.6. Do you know of any specific programmes financed by the European Union in Ukraine?		Yes	No	Total
Settlement size	Equal to or more than 150,000 inhabitants	45%	55%	100%
	Between 20,000 and 150,000 inhabitants	36%	64%	100%
	Less than 20,000 inhabitants	22%	78%	100%
Gender	Male	37%	63%	100%
	Female	28%	72%	100%
Age group	15-34 years	32%	68%	100%
	35-54 years	32%	68%	100%
	55 years & above	33%	67%	100%
Education level	Low/Medium level	22%	78%	100%
	High level	43%	57%	100%
Employment status	Employed / Self-employed	37%	63%	100%
	Unemployed or temporarily not working / inactive	30%	70%	100%
Mother tongue	Ukrainian	26%	74%	100%
	Russian	52%	48%	100%
Geographical area	Centre	28%	72%	100%
	East	33%	67%	100%
	West	35%	65%	100%
Total		32%	68%	100%

Percentages refer to Ukrainians who were aware of the EU's financial support

The most well-known EU-financed programmes in Ukraine are in the fields of economic reforms/business promotion (43%), education (33%) and culture (30%) (fig. 6). Programmes in the fields of agricultural and rural development were cited less frequently, as was “financing the army”, which was spontaneously mentioned by some respondents.

In general, only 2% of Ukrainians reported they have personally been involved or know someone who has been involved in recent EU-funded projects.

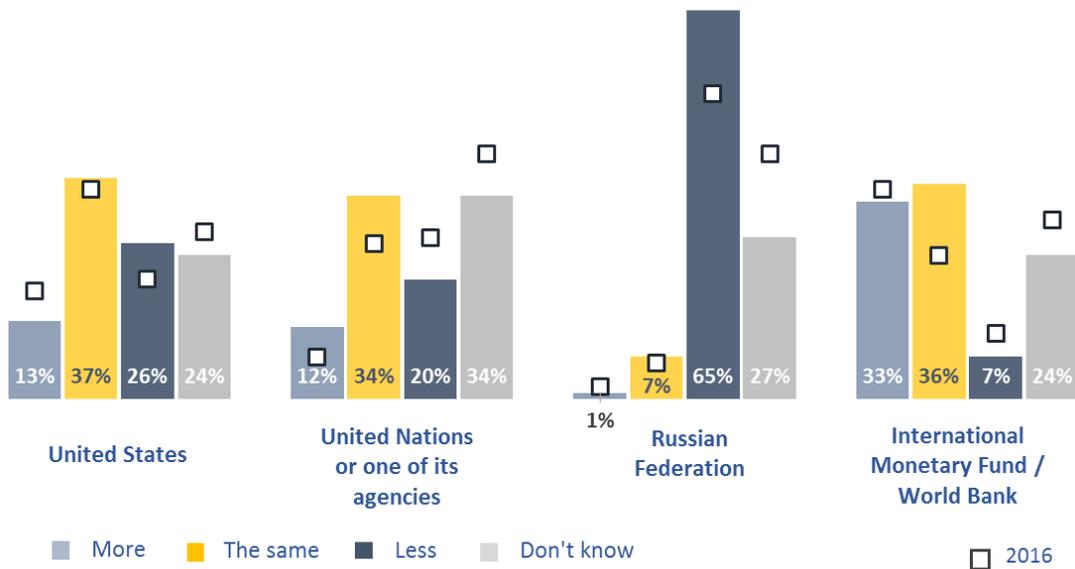
FIGURE 6 – Which specific programme(s) do you know? (Q2.6.1, multiple answers possible)



Percentages refer to Ukrainians who were aware of the EU's financial support

Between 24% and 34% of Ukrainians say they do not have sufficient information to compare the support provided by the EU and that provided by other institutions, such as the International Monetary Fund (IMF)/World Bank (WB), the United States of America, the United Nations and its agencies, and the Russian Federation. In general, the Russian Federation is recognised as the worst donor compared to the EU (65% of Ukrainians think Russia provides less support than the EU), while every third citizen (33%) believes that the International Monetary Fund/World Bank is a larger contributor of financial support than the EU. Awareness of support provided by the United Nations and its agencies is lowest compared to other agencies, although it is worth mentioning that information about the support provided by the UN and its agencies, as well as by the Russian Federation, was even lower in 2016 (fig. 7).

FIGURE 7 – As far as you know, for each of the following international institutions, would you say that it provides more, the same, or less financial support to your country than the European Union? (Q2.7)



Percentages refer to Ukrainians who have heard about the EU

Ukrainian citizens believe that tourism (37%), access to more products and services (37%) and improved trade (33%) are among the largest benefits received from the EU. They also believe that the fight against corruption is the field that has benefitted the least from the EU. The assessment of benefits received from the EU in other fields is quite similar and varies from 9% to 16%⁸. It is also worth mentioning that the areas where Ukrainians feel their country has benefitted least from EU support are those where they feel the EU should play a greater role, as shown in the figure below (fig. 8)⁹.

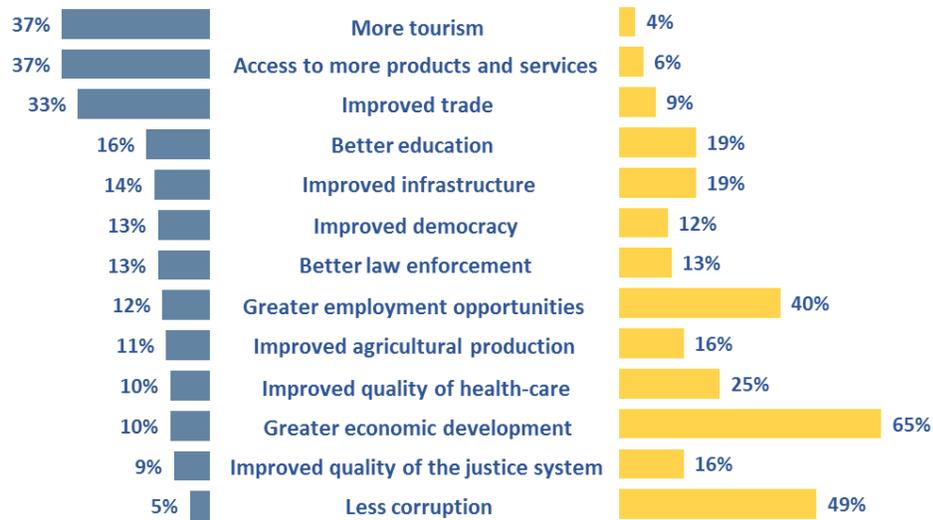
Almost two thirds of the population (65%) believe economic development to be the number-one priority.

Almost half (49%) of people in Ukraine also believe that the EU should help more to fight corruption and that EU support should be more focused on creating greater employment opportunities (40%).

⁸ More details are provided in Annex, Table A1.

⁹ Respondents were asked to name and rank the three most important areas in which the EU should play a greater role. More details are provided in Annex, Table A2.

FIGURE 8 – Areas that have benefitted very much or fairly from EU support (Q2.8) & three most important areas that require greater support from the EU (Q2.9)



Areas that have benefitted from EU support

Areas that request a greater role of EU

Percentages refer to Ukrainians who have heard about the EU

3.2.3. Attitudes towards the EU: a snapshot

In this section, the attitude of Ukrainians towards the EU has been analysed according to two main profiles: individuals who have a positive attitude towards the EU and those who are mostly neutral.¹⁰ Four indicators were considered: level of trust, relationship between Ukraine and the EU, awareness of the EU’s financial support and effectiveness of EU support.

The first thing that should be noted is that, unsurprisingly, individuals who have a positive image of the EU are also more likely to be more positively oriented for all four indicators, in comparison to the neutral population (fig. 9).¹¹ In particular, 90% of those who have a positive attitude also tend to trust the EU, compared to less than half of those who are mostly neutral (48%). A difference of around 20 per cent between positively and neutrally oriented people was recorded for the other three indicators.

¹⁰ Individuals who were mostly negatively oriented were excluded from the comparison, as their number was too small for the results to be statistically significant.

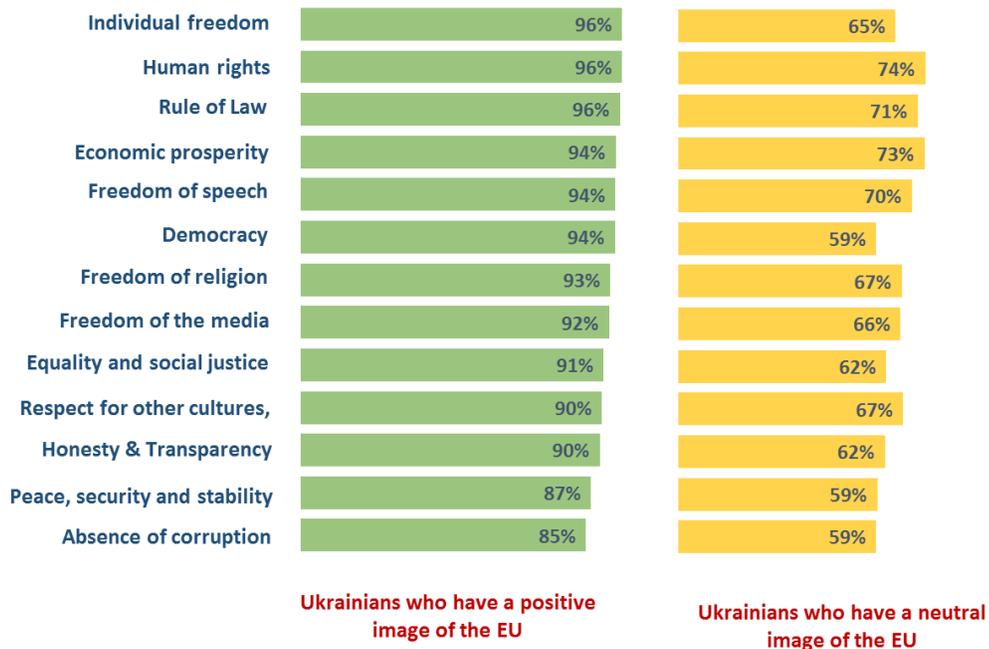
¹¹ More details are provided in Annex, Table A3.

FIGURE 9 – Attitudes towards the EU: positive versus neutral



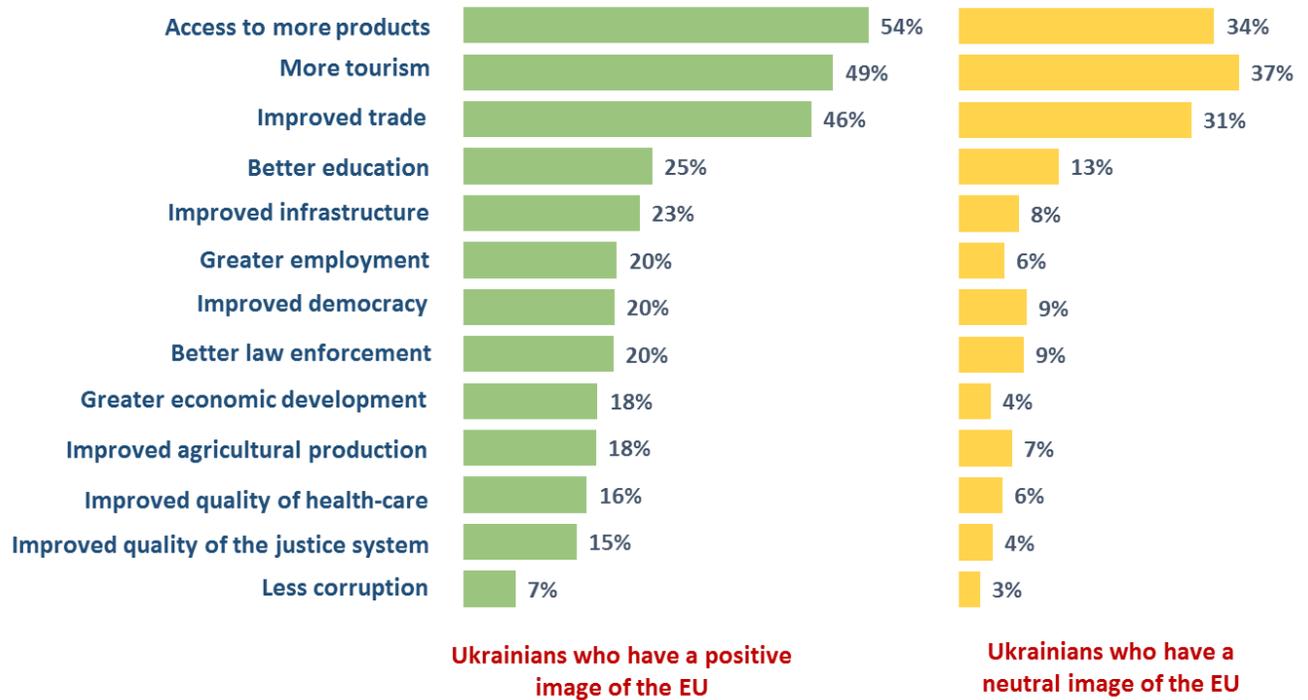
The top three values which Ukrainians who have a positive image of the EU tend to strongly and very strongly link with the Union are individual freedom, human rights and rule of law (fig. 10). Neutrally oriented people mostly associate the EU with similar values although, of the top three choices for people with a positive image of the EU, economic prosperity seems to be more important for neutral people compared to individual freedom. The least associated values – such as absence of corruption and peace, security and stability – are the same for both groups, although it is worth mentioning that democracy is highly valued by those with a positive image of the EU, while people with a neutral image associate this value with EU the least. Again, individuals who have a positive image of the EU are more likely than the neutral population to strongly link all values with the EU.

FIGURE 10 – Values strongly associated with the EU – positive versus neutral



Similarly, those with positive attitudes towards the EU see more benefits for Ukraine from the EU than neutrally oriented people. As shown in figure 11, both positively and neutrally oriented Ukrainians believe that the European Union has very much or fairly enhanced access to more products, encouraged tourism and improved trade, but a larger share of people with a positive image of the EU strongly link these benefits to the EU, compared to those with a neutral image.

FIGURE 11 – Areas that have very much or fairly benefitted from EU support: positive versus neutral



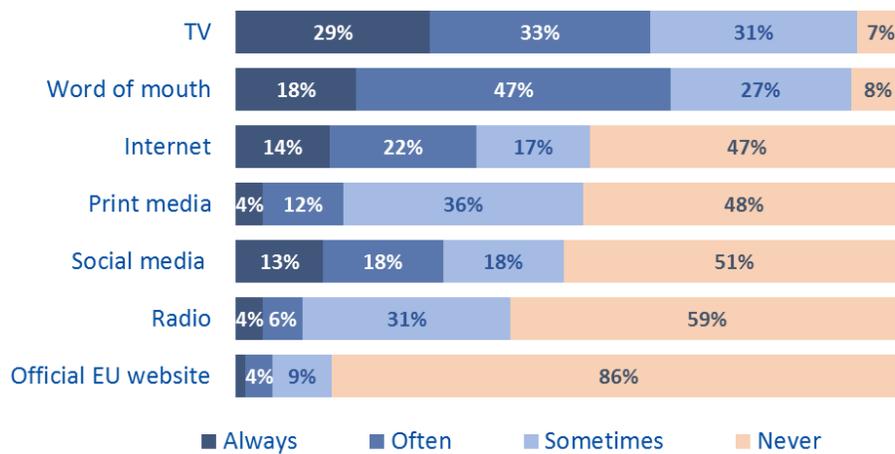
3.3. Sources of information on the EU

3.3.1. Media usage as sources of information

Television and word of mouth are the most popular sources of information in Ukraine: 29% of Ukrainians state that they always watch television while 18% always receive their information from neighbours, friends, colleagues, etc. 33% often watch television to get their information, while almost half of Ukrainians (47%) often obtain information through word of mouth. 31% and 27% respectively say they sometimes use these sources of information (fig. 12).

Other most commonly used sources of information are the internet, print media and social media – as stated by about half of the population. The radio appears to be relatively less popular among the population (41%). As for the official EU website – this is never used by 86% of Ukrainians.

FIGURE 12 – Type of media used as a source of information (Q3.8)



Overall, people who do not frequently use any of the above-mentioned media account for 18% of the population, while 42% of Ukrainians frequently use only traditional media and 40% are regularly active on social media and the internet (tab. 8).¹²

Traditional media users are more likely to be female (48%), aged 55 years or older (77%) and unemployed/inactive (46%), while they tend to have a low or medium level of education (53%), speak Ukrainian (44%) and live in medium or small-sized settlements (47% and 48% respectively). On the other hand, social media and internet users tend to be male (49%), with a high level of education (53%), aged 15-34 years (68%) and employed (56%). They also typically speak Russian (46%) and live in the centre and/or west of the country (44% for both) and in large-sized settlements (54%).

People who do not use any media are more or less equally distributed across the various socio-demographic clusters, with relatively bigger proportions observed among inhabitants in the east of the country (24%). Word of mouth as a source of information tends to be more widespread among the older generation (71%) and people with a higher level of education (71%).

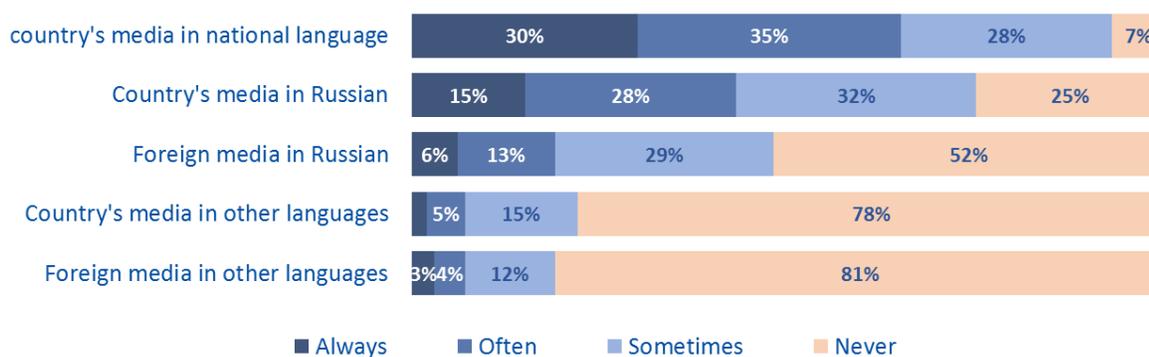
¹² The first group includes all individuals who do not “always or often” use any of the surveyed media; the second group includes all individuals who “always or often” use only traditional media (such as television, radio and print media); while the last group includes all individuals that always or often use either internet (including the official EU web site) or social media.

TABLE 8 – Type of media frequently used as source of information

		Type of media frequently used as source of information (Q3.8)				Word of mouth used as source of information (Q3.8)
		No media	Only traditional media	Only social media or internet	Total	
Settlement size	Equal to or more than 150,000 inhabitants	14%	32%	54%	100%	66%
	Between 20,000 and 150,000 inhabitants	19%	47%	34%	100%	49%
	Less than 20,000 inhabitants	20%	48%	32%	100%	69%
Gender	Male	16%	35%	49%	100%	61%
	Female	19%	48%	33%	100%	68%
Age group	15-34 years	19%	13%	68%	100%	62%
	35-54 years	18%	36%	46%	100%	61%
	55 years & above	15%	77%	8%	100%	71%
Education level	Low/Medium level	17%	53%	30%	100%	60%
	High level	17%	30%	53%	100%	71%
Employment status	Employed / Self-employed	14%	30%	56%	100%	68%
	Unemployed or temporarily not working / inactive	18%	46%	36%	100%	64%
Mother tongue	Ukrainian	18%	44%	38%	100%	67%
	Russian	17%	37%	46%	100%	58%
Geographical area	Centre	16%	40%	44%	100%	66%
	East	24%	45%	31%	100%	61%
	West	14%	42%	44%	100%	68%
Total		18%	42%	40%	100%	65%

The vast majority of Ukrainians (30% always, 35% often and 28% sometimes) rely on media in their own language (fig. 13). Only a quarter of the population stated that they have never used the country’s media in Russian, while the rest use it, albeit with different frequencies. Half of Ukrainian citizens have never used foreign media in Russian. As for the usage of media in languages other than Ukrainian or Russian, it appears to be very rare – 78% of people never use Ukrainian media in other languages and even more (81%) never use foreign media in other languages.

FIGURE 13 – Usage of media in Ukrainian, Russian and other languages (Q3.7)



In the table below, the socio-demographic characteristics of the population have been analysed according to three main profiles: individuals who frequently use media in the national language, individuals who frequently use media in Russian and individuals who use media in other foreign languages.¹³

¹³ The first group includes all individuals who “always or often” use media in Ukrainian; the second group includes all individuals who “always or often” use the country’s or foreign media in Russian; while the last group includes all individuals who “always or often” use the country’s or foreign media in other languages.

In general, media in the national language is the most popular information source (65%) in all target groups, but Russian language media is also consumed by 47% of Ukrainians and only 9% of them consume media in other languages. Media in the national language is the most common information source for the inhabitants of small settlements (75%), residents of the western part of the country (74%) and people over 55 (71%).

TABLE 9 – Frequent usage of media in national language, Russian and other languages

		Individuals that always or often use media		
		In national language	In Russian	In other foreign language
Settlement size	Equal to or more than 150,000 inhabitants	56%	66%	10%
	Between 20,000 and 150,000 inhabitants	52%	46%	8%
	Less than 20,000 inhabitants	75%	33%	8%
Gender	Male	62%	51%	9%
	Female	67%	43%	9%
Age group	15-34 years	57%	48%	8%
	35-54 years	66%	48%	12%
	55 years & above	71%	44%	7%
Education level	Low/middle level	65%	38%	4%
	High level	65%	56%	15%
Employment status	Employed / Self-employed	68%	54%	10%
	Unemployed or temporarily not working / inactive	64%	44%	8%
Mother tongue	Ukrainian	67%	41%	7%
	Russian	57%	67%	16%
Geographical area	Centre	60%	58%	10%
	East	60%	51%	5%
	West	74%	31%	11%
Total		65%	47%	9%

Trust levels towards different media sources differ from the usage patterns of media: only half of Ukrainian citizens trust the country's media in the national language, while the vast majority (93%) use it. Similarly, 75% of the population reported that they use the country's media in Russian, but only 35% tend to trust it. More than half of Ukrainians (55%) are undecided on whether to trust the media in other languages or not. This finding is logically linked to the fact that other language media is the least utilised source among the population. Also, the level of trust towards foreign media in Russian is notably lower compared to trust towards Ukrainian-language media (20% vs. 51%), even though 48% of Ukrainians consume this media. Word of mouth and television appear to be the most trusted sources of information in Ukraine (68% and 47% respectively) and 55% of people do not know how much to trust the official EU website, which could be caused by their lack of use and awareness of such a source of information¹⁴.

3.3.2. Sources of information about the EU

63% of Ukrainians claimed to have heard about the European Union in the last three months, as compared to 78% in 2016. As last year, residents of larger cities were more likely to have been exposed to information about the EU recently (71%). In addition, employed citizens (72%), highly educated people (69%) and those living in the western part of the country (70%) were more likely than other groups to have seen or heard information about the EU in the last three months (tab. 10).

¹⁴ More details are provided in Annex, Table A4.

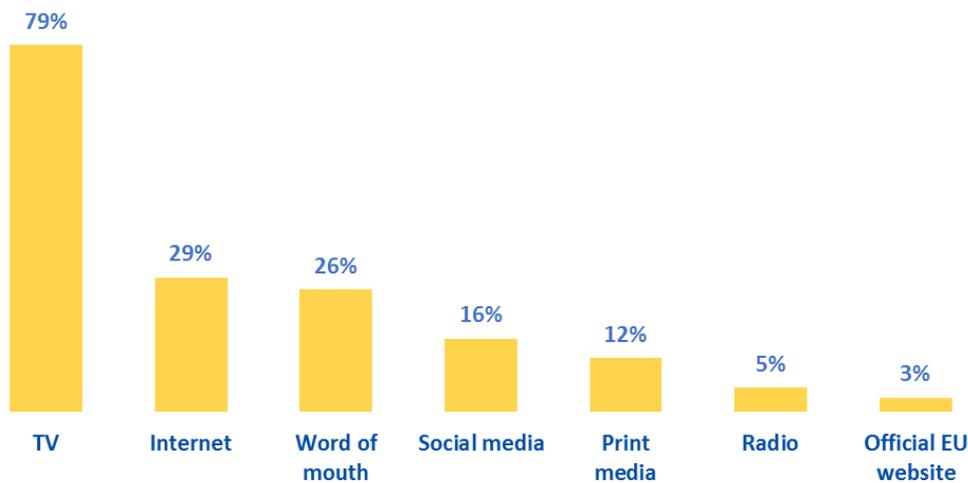
TABLE 10 – Exposure to information about the EU

Q3.2. Have you seen or heard any information about the EU in the last three months?		Yes	No	Total
Settlement size	Equal to or more than 150,000 inhabitants	71%	29%	100%
	Between 20,000 and 150,000 inhabitants	55%	45%	100%
	Less than 20,000 inhabitants	60%	40%	100%
Gender	Male	67%	33%	100%
	Female	60%	40%	100%
Age group	15-34 years	57%	43%	100%
	35-54 years	67%	33%	100%
	55 years & above	65%	35%	100%
Education level	Low/Medium level	58%	42%	100%
	High level	69%	31%	100%
Employment status	Employed / Self-employed	72%	28%	100%
	Unemployed or temporarily not working / inactive	61%	39%	100%
Mother tongue	Ukrainian	63%	37%	100%
	Russian	62%	38%	100%
Geographical area	Centre	56%	44%	100%
	East	64%	36%	100%
	West	70%	30%	100%
Total		63%	37%	100%

Percentages refer to Ukrainians who have heard about the EU

Most of the information recently obtained by people came from television (79%). Nearly 30% of Ukrainians heard or saw information about the EU through the internet, slightly more than one quarter (26%) through word of mouth and 16% and 12% from social media and print media respectively. Radio and the official EU website each accounted for less than 5% of people.

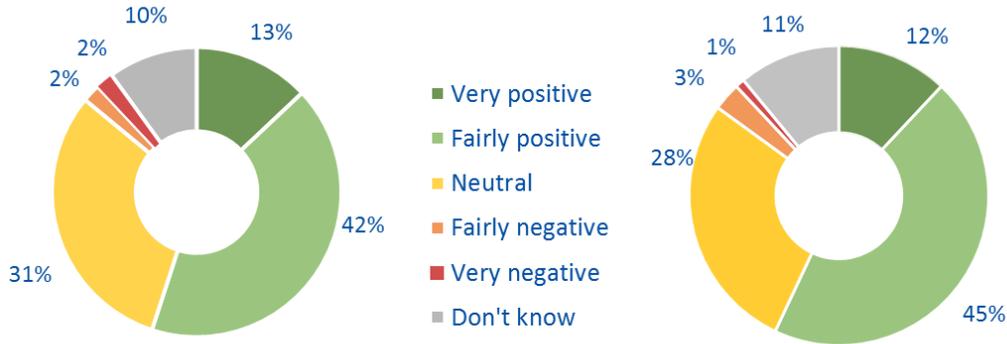
FIGURE 14 – Where or from whom you have you seen or heard information about the EU in the last three months? (Q3.2.1, multiple answers possible)



Percentages refer to Ukrainians who have heard about the EU

When asked to evaluate the image of the EU in the national media, more than half of the population felt that the national media represented the European Union positively (very positively: 13%; fairly positively: 42%), with no substantial changes compared to last year. Around a third of the Ukrainian population believed the EU’s representation in the national media to be neutral and one in ten did not have an opinion regarding this issue (fig. 15). Only 4% of the population deemed the image of the EU in the national media to be fairly or very negative.

FIGURE 15 – In general, how would you say the EU was presented in the national media? (Q3.3)



Percentages refer to Ukrainians who have heard about the EU

Those who believe that the EU is positively represented in the national media usually come from large-sized settlements (65%), are employed (60%), are highly educated (61%) and live in the western and eastern parts of the country (62% and 57%, respectively) (tab. 11).

In general, about one third of the population feel the EU representation to be neutral across all sub-groups, with the highest proportion of such people found among the Russian speaking population (39%) and the lowest among those residing in large settlements (25%).

TABLE 11 – Representation of the EU in the national media

Q3.3. In general how would you say the EU was presented in the national media?						
		Positive	Neutral	Negative	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	65%	25%	4%	6%	100%
	Between 20,000 and 150,000 inhabitants	57%	31%	4%	8%	100%
	Less than 20,000 inhabitants	48%	35%	4%	13%	100%
Gender	Male	54%	32%	5%	9%	100%
	Female	56%	30%	4%	10%	100%
Age group	15-34 years	57%	27%	5%	11%	100%
	35-54 years	58%	32%	4%	6%	100%
	55 years & above	51%	33%	4%	12%	100%
Education level	Low/Medium level	51%	31%	5%	13%	100%
	High level	61%	30%	4%	5%	100%
Employment status	Employed / Self-employed	60%	30%	4%	6%	100%
	Unemployed or temporarily not working / inactive	54%	31%	5%	10%	100%
Mother tongue	Ukrainian	57%	28%	4%	11%	100%
	Russian	50%	39%	4%	7%	100%
Geographical area	Centre	48%	34%	6%	12%	100%
	East	57%	34%	5%	4%	100%
	West	62%	24%	2%	12%	100%
Total		55%	31%	4%	10%	100%

Percentages refer to Ukrainians who have heard about the EU

According to 48% of the population, the information they read, watch or access online very much or fairly helps them to have a better understanding of the European Union. 33% of people disagree with this notion and think that the information does not (not very much or not at all) help them to better understand the EU. Nearly a fifth of the population in Ukraine are uncertain about this issue.

The following section looks specifically at sources of information about the EU, therefore it only refers to Ukrainians who actively look for/access information on the EU.

The majority of Ukrainians (61%) never look for/access information on the EU, while almost one in three do so but not very frequently. Just over one in ten of those asked (11%) say they look for information about the EU very frequently or frequently – a slight increase compared to 2016.

FIGURE 16 – How often do you look for/access information on the EU? (Q3.1)



Percentages refer to Ukrainians who have heard about the EU

The highest share of people who never look for information on the EU can be found in small-sized settlements with less than 20,000 inhabitants (67%), in central and/or western areas of the country (69% and 66% respectively) and among the youngest and oldest age groups (67% and 65% respectively), the unemployed/inactive population (63%) and the Ukrainian-speaking population (64%). On the other hand, people from large cities and the eastern part of the country, the middle age group and those with higher education tend to access information on the EU more frequently than other groups (tab. 12).

TABLE 12 – Accessing information about the EU

Q3.1. How often do you look for/access information on the EU?		Frequently	Not very frequently	Never	Total
Settlement size	Equal to or more than 150,000 inhabitants	16%	30%	54%	100%
	Between 20,000 and 150,000 inhabitants	10%	34%	56%	100%
	Less than 20,000 inhabitants	8%	25%	67%	100%
Gender	Male	11%	32%	57%	100%
	Female	11%	26%	63%	100%
Age group	15-34 years	8%	25%	67%	100%
	35-54 years	17%	34%	49%	100%
	55 years & above	8%	27%	65%	100%
Education level	Low/Medium level	6%	30%	64%	100%
	High level	17%	27%	56%	100%
Employment status	Employed / Self-employed	14%	33%	53%	100%
	Unemployed or temporarily not working / inactive	10%	27%	63%	100%
Mother tongue	Ukrainian	10%	26%	64%	100%
	Russian	14%	36%	50%	100%
Geographical area	Centre	6%	25%	69%	100%
	East	19%	37%	44%	100%
	West	9%	25%	66%	100%
Total		11%	28%	61%	100%

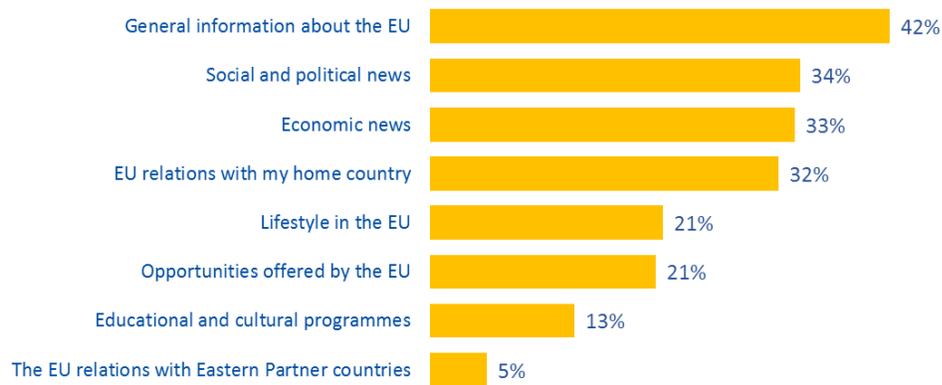
Percentages refer to Ukrainians who have heard about the EU

Just under half of Ukrainians (43%) who search for information about the EU access it in their national language, while more than 50% prefer to find EU-related information in Russian. Only 3% stated that they searched for information in English.

Among the things people search for about the European Union are general information (42%) followed by social and political news (34%), economic news (33%) and EU relations with Ukraine (32%) (fig. 17).

21% search for information about lifestyles in EU Member States and opportunities offered by the EU. 13% of Ukrainians look for information about educational and cultural programmes and only 5% for information concerning EU relations with Eastern Partner countries.

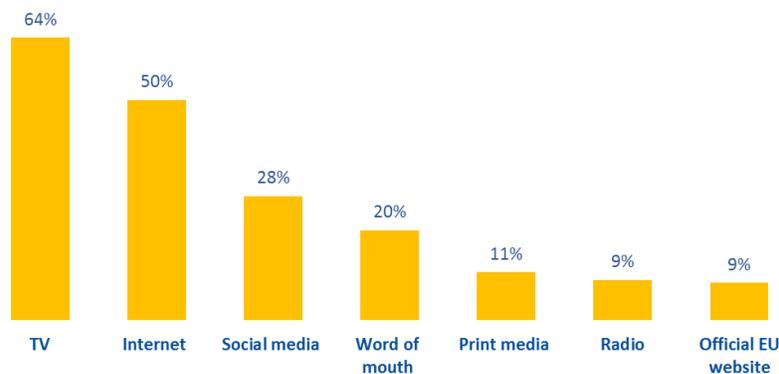
FIGURE 17 – What type of information do you normally look for? (Q3.1.2, multiple answers possible)



Percentages refer to Ukrainians who have looked for/accessed information on the EU

Passive exposure to information about the EU mostly stems from television (79%) and to an extent from the internet (29%) and word of mouth (26%). Similarly, those actively searching for/accessing information still rely on television (64%) and the internet (50%), but also social media (28%) (fig. 18). One fifth of Ukrainians find the information they need through word of mouth (20%) and 11% through print media, while fewer than 10% visit the official EU website or listen to the radio.

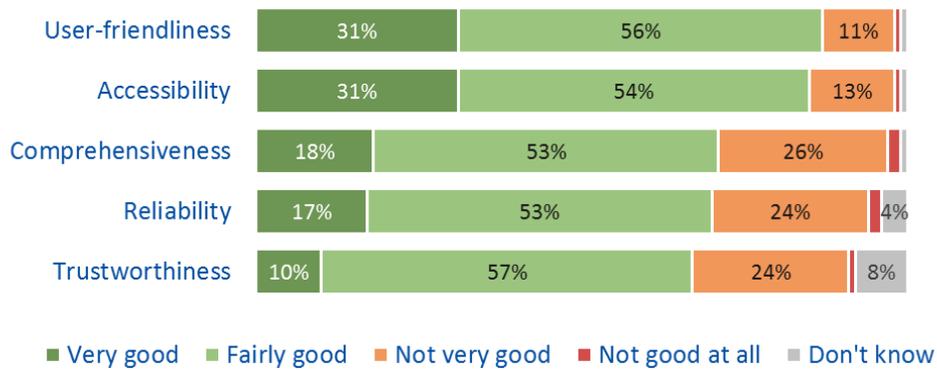
FIGURE 18 – Where do you go to find information about the EU? (Q3.1.4, multiple answers possible)



Percentages refer to Ukrainians who have looked for/accessed information on the EU

Most people searching for information about the EU rate the information as being user-friendly (very – 31%; fairly – 56%) and accessible (very – 31%; fairly – 54%) (fig. 19). They also find the information comprehensive (71%), reliable (70%) and trustworthy (67%). It is worth noting that a quarter of Ukrainians do not assess the information as being comprehensive, reliable or trustworthy.

FIGURE 19 – How would you rate the information in terms of...? (Q3.1.5)



Percentages refer to Ukrainians who have looked for/accessed information on the EU

It is worth noting that 13% of those who have heard about the EU have used EU informational websites¹⁵ at least once. The Facebook profile of the European Union is the most visited EU website (11% of the population) followed by the institutional website (5%), Twitter page (4%) and websites of EU projects (4%). The rest of the EU pages are only viewed by 1%-3% of the target audience.

3.3.3. Sources of information and attitude towards the EU

As in section 3.3.1, the attitudes of Ukrainians towards the EU have been analysed according to two main profiles – people that frequently rely on traditional media and those who are regularly active on social media and the internet. Individuals using word of mouth as a source of information have been assessed separately and the figures for them are presented in Annex - Table A5.

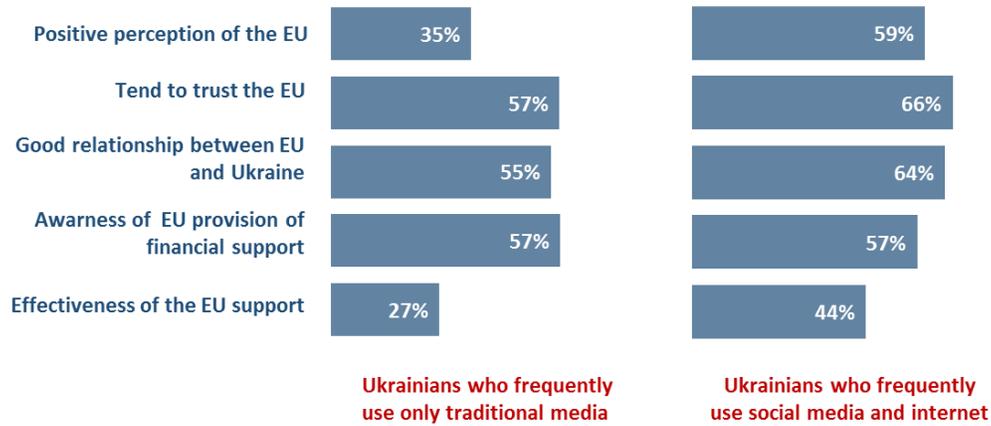
Almost twice as many people among social media and internet users have a positive perception of the EU, compared to those who use traditional media (59% vs. 35%). Likewise, a larger proportion of social media and internet users are more likely to trust the EU and assess the relationship between the EU and Ukraine positively. Awareness of EU financial support is similar among the two groups (57%), although internet and social media users are more satisfied with its effectiveness, compared to those who use only traditional media (fig. 20)¹⁶.

The profile of Ukrainians who are frequent users of word of mouth as a source of information tends to be positioned between those who rely on traditional media and social media and internet users.

¹⁵ EU institutions' websites; EU Delegation website; EU projects' website; EU Neighbourhood Info Centre portal; EU Twitter; EU Facebook.

¹⁶ More details are provided in Annex, Table A5.

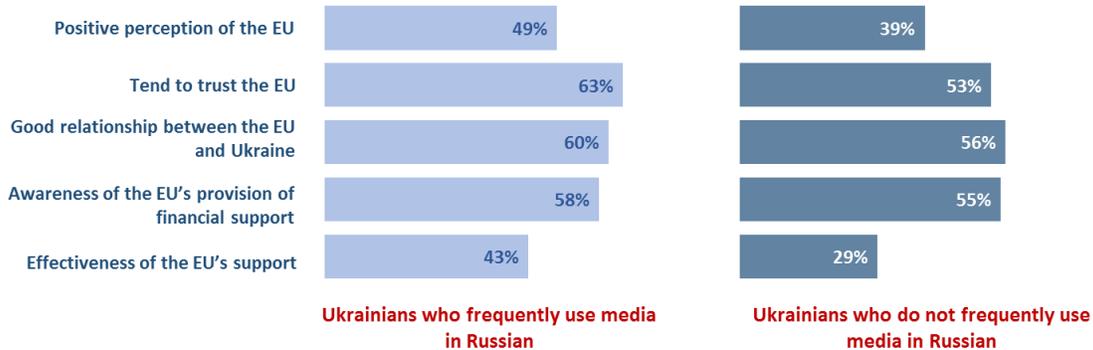
FIGURE 20 – Type of media frequently used as a source of information and attitude towards the EU



Percentages refer to Ukrainians who have heard about the EU

Attitudes towards the EU have also been assessed by comparing the people that frequently use media in Russian against those who do not (fig. 21).¹⁷ The majority of people, regardless of whether they frequently access media in Russian or not, tend to trust the EU and consider the relationship between the EU and Ukraine to be positive. Alongside this, more than 55% of Ukrainians from both groups tend to be aware of the EU’s financial support to Ukraine, but notably more Russian media users are positively disposed towards the EU and trust in the effectiveness of EU support to Ukraine, compared to those who do not use media in Russian (49% vs. 39% and 43% vs. 29% respectively)¹⁸.

FIGURE 21 – Frequent usage of media in Russian and attitude towards the EU



Percentages refer to Ukrainians who have heard about the EU

¹⁷ This should not be taken as evidence that Russian speakers or the Russian media are more positively disposed to the EU. Approximately two thirds of the print media in Ukraine are published in the Russian language, including the most influential weeklies, which are read by the educated, urban middle class. As noted above, those persons positively disposed to the EU are likely to have higher education, use the internet and be urban dwellers.

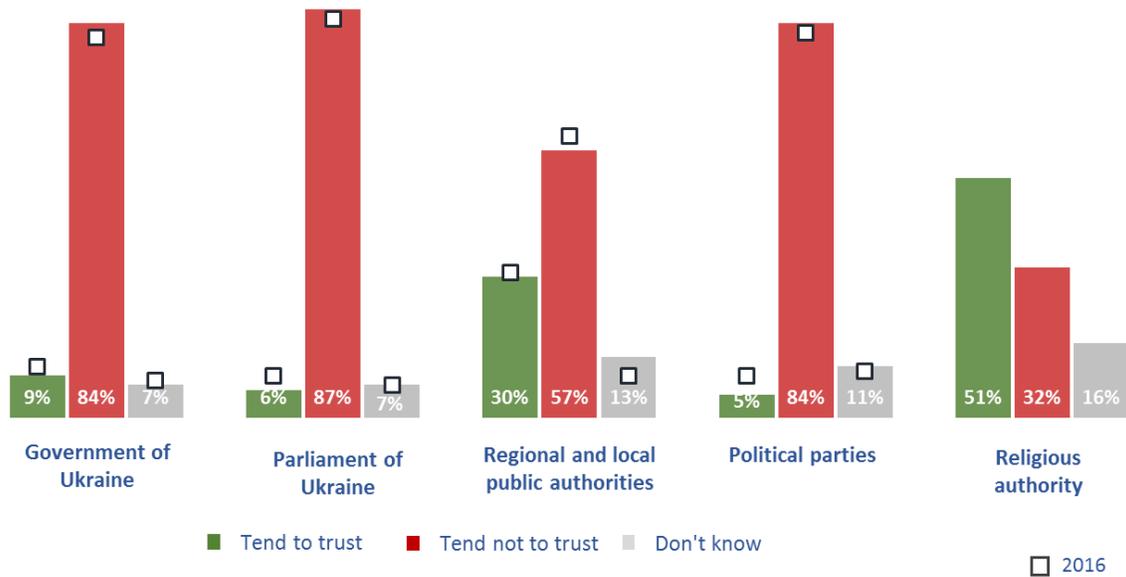
¹⁸ More details are provided in Annex, Table A6.

3.4. View of Ukraine’s current situation and future expectations

3.4.1. View of Ukraine’s current situation

Just like in 2016, Ukrainians do not have a great deal of trust in national, regional and local institutions, with the share of individuals who tend to trust these institutions very low and around the same level across the two years (fig. 22). Regional and local public authorities are some of the most trusted institutions, favoured by a third of Ukrainians, while less than 10% of the population trust the other main institutions. Another interesting finding relates to the new variable that was included in 2017: religious authority. In fact, this appears to be the most trusted institution in Ukraine (51%), while less than a third (32%) tend not to trust this and 16% don’t know.

FIGURE 22 – Please tell us your level of trust for the following institutions (Q4.1)



When it comes to the current situation in Ukraine in terms of democracy, although there has been a decrease in the proportion of people who state they are not at all satisfied (-9 per cent) since 2016, nearly a third of Ukrainians remain completely dissatisfied with the way democracy works in their country (fig. 23). Complete dissatisfaction, as noted, has decreased from 38% to 29% since last year, while the share of satisfied (very and fairly) and fairly dissatisfied citizens has overall remained stable (15% and 42% respectively). In 2017, 14% (+6 per cent compared to 2016) were not sure how to respond.

FIGURE 23 – On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in Ukraine? (Q4.3)



The data does not show notable differences among various socio-demographic groups, with the exception of those residing in medium-sized cities (84%), living in eastern part of the country (84%) and in the middle age group (83%), who all tend to show greater levels of dissatisfaction compared to other groups. Alongside this, about one fifth of people among the youngest age group, people with low or medium levels of education, residents of small-sized settlements and those living in central parts of the country tend to be more hesitant in their attitudes when it comes to the current situation in terms of democracy in Ukraine (tab. 13).

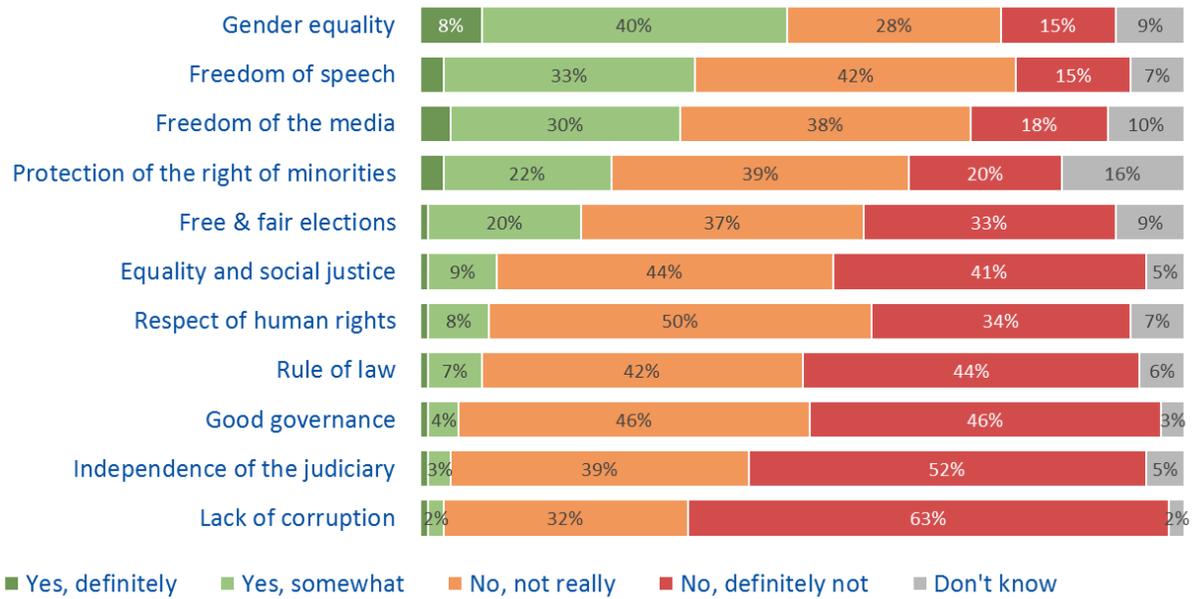
TABLE 13 – Satisfaction with democracy in Ukraine

Q4.3. On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in Ukraine?

		Satisfied	Not satisfied	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	18%	69%	13%	100%
	Between 20,000 and 150,000 inhabitants	14%	84%	2%	100%
	Less than 20,000 inhabitants	12%	68%	20%	100%
Gender	Male	19%	69%	12%	100%
	Female	11%	72%	17%	100%
Age group	15-34 years	17%	61%	22%	100%
	35-54 years	11%	83%	6%	100%
	55 years & above	15%	67%	18%	100%
Education level	Low/Medium level	12%	68%	20%	100%
	High level	17%	74%	9%	100%
Employment status	Employed / Self-employed	17%	75%	8%	100%
	Unemployed or temporarily not working / inactive	13%	69%	18%	100%
Mother tongue	Ukrainian	13%	70%	17%	100%
	Russian	18%	74%	8%	100%
Geographical area	Centre	13%	67%	20%	100%
	East	12%	84%	4%	100%
	West	19%	62%	19%	100%
Total		15%	71%	14%	100%

Nearly half of the population in Ukraine believe that gender equality applies in their country, followed by freedom of speech (36%), freedom of media (34%) and protection of the rights of minorities (25%) (fig. 24). Respect for human rights, rule of law, equality and social justice, good governance, independence of the judiciary, lack of corruption and free & fair elections, on the other hand, were assessed as problematic by the majority of the population (proportions varied between 70% and 95% for different aspects on the list).

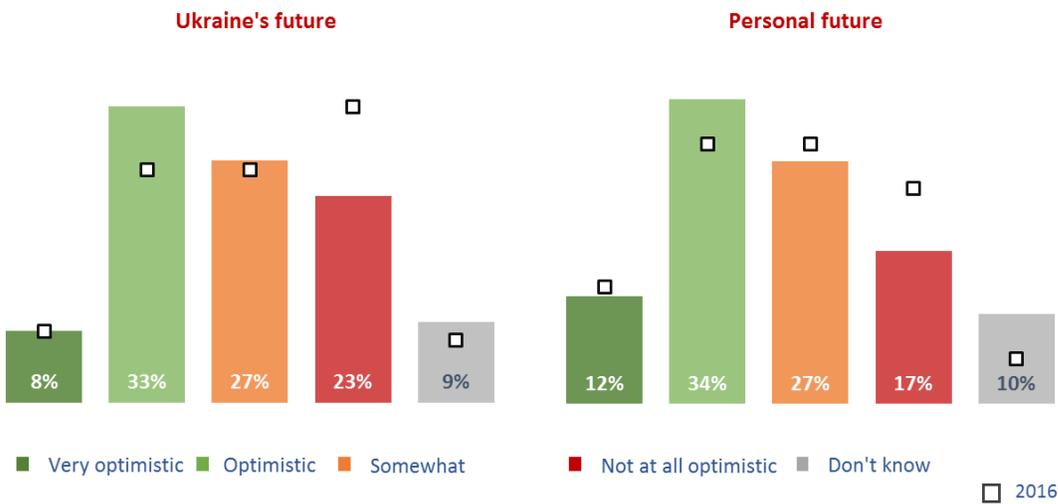
FIGURE 24 – To what extent do you think that the following elements apply in Ukraine? (Q4.4)



3.4.2. Future expectations

Ukrainians generally seem to be slightly more optimistic towards their own future (46%) compared to the future of their country (41%). In both cases, the degree of optimism expressed by Ukrainians is slightly up on last year (34% in 2016 vs. 41% in 2017 for Ukraine’s future; 42% in 2016 vs. 46% in 2017 for personal future) (fig. 25).

FIGURE 25 – How optimistic are you about the future of your country? (Q4.5) & How optimistic are you about your personal future? (Q4.6)



There were no major differences observed with regards to the degree of optimism towards Ukraine’s future among various socio-demographic groups of people. It is notable, however, that the highest level of optimism was found among the youngest age group (52%) compared to just 29% of those aged 55 and above. Moreover, those with the highest levels of pessimism can be found among the oldest age group (60%) and people residing in central areas of the country (62%) (tab. 14).

TABLE 14 – Optimism regarding Ukraine’s future

Q4.5. How optimistic are you about the future of your country?					
		Optimistic	Pessimistic	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	45%	48%	7%	100%
	Between 20,000 and 150,000 inhabitants	37%	58%	5%	100%
	Less than 20,000 inhabitants	39%	50%	11%	100%
Gender	Male	46%	45%	9%	100%
	Female	36%	55%	9%	100%
Age group	15-34 years	52%	39%	9%	100%
	35-54 years	42%	52%	6%	100%
	55 years & above	29%	60%	11%	100%
Education level	Low/Medium level	37%	51%	12%	100%
	High level	45%	49%	6%	100%
Employment status	Employed / Self-employed	46%	51%	3%	100%
	Unemployed or temporarily not working / inactive	39%	50%	11%	100%
Mother tongue	Ukrainian	40%	51%	9%	100%
	Russian	44%	49%	7%	100%
Geographical area	Centre	33%	62%	5%	100%
	East	49%	49%	2%	100%
	West	42%	39%	19%	100%
Total		41%	50%	9%	100%

The highest percentages of optimism regarding personal future were also found among younger people (66%) and employed people (57%). Again, people with higher levels of pessimism can be found among the oldest age group (aged 55 and above) (61%) (tab. 15).

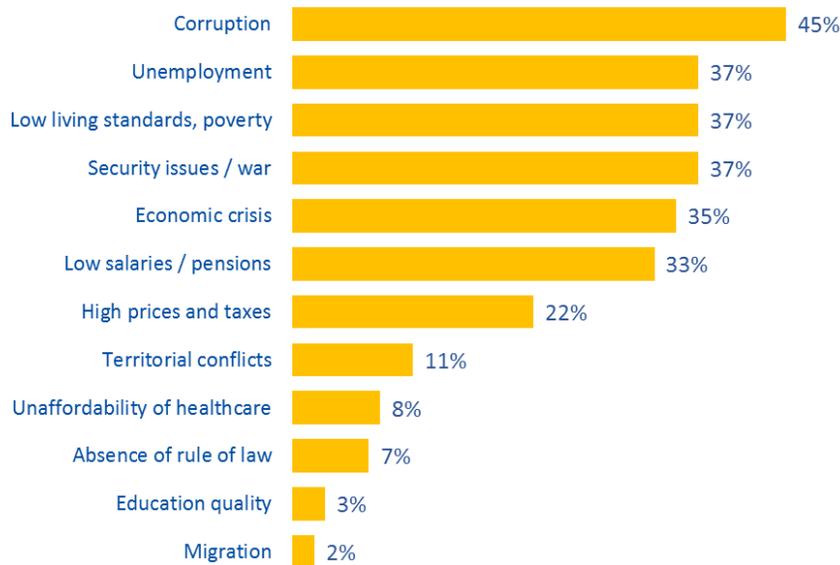
TABLE 15 – Optimism regarding personal future

Q4.6. How optimistic are you about your personal future?					
		Optimistic	Pessimistic	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	41%	52%	7%	100%
	Between 20,000 and 150,000 inhabitants	45%	45%	10%	100%
	Less than 20,000 inhabitants	51%	38%	11%	100%
Gender	Male	50%	39%	11%	100%
	Female	43%	48%	9%	100%
Age group	15-34 years	66%	28%	6%	100%
	35-54 years	47%	43%	10%	100%
	55 years & above	26%	61%	13%	100%
Education level	Low/Medium level	42%	45%	13%	100%
	High level	51%	43%	6%	100%
Employment status	Employed / Self-employed	57%	36%	7%	100%
	Unemployed or temporarily not working / inactive	43%	47%	10%	100%
Mother tongue	Ukrainian	47%	43%	10%	100%
	Russian	43%	51%	6%	100%
Geographical area	Centre	41%	50%	9%	100%
	East	56%	42%	2%	100%
	West	43%	40%	17%	100%
Total		46%	44%	10%	100%

The most pressing problems in Ukraine are corruption (45%), unemployment (37%), low living standards and poverty (37%) and security issues / war (37%), followed by economic crisis (35%) and low salaries and pensions (33%) (fig. 26). One fifth of Ukrainians also mentioned high prices and taxes among the most pressing problems currently faced by their country. As previously noted, employment (40%), economic

development (65%) and corruption (49%) are, according to Ukrainians, the areas where the EU is seen as having the least impact and should play a greater role.

FIGURE 26 – What do you consider to be the most pressing problems facing your country? (Q4.2, multiple answers possible)



3.4.3. Views of the country and attitude towards the EU: a snapshot

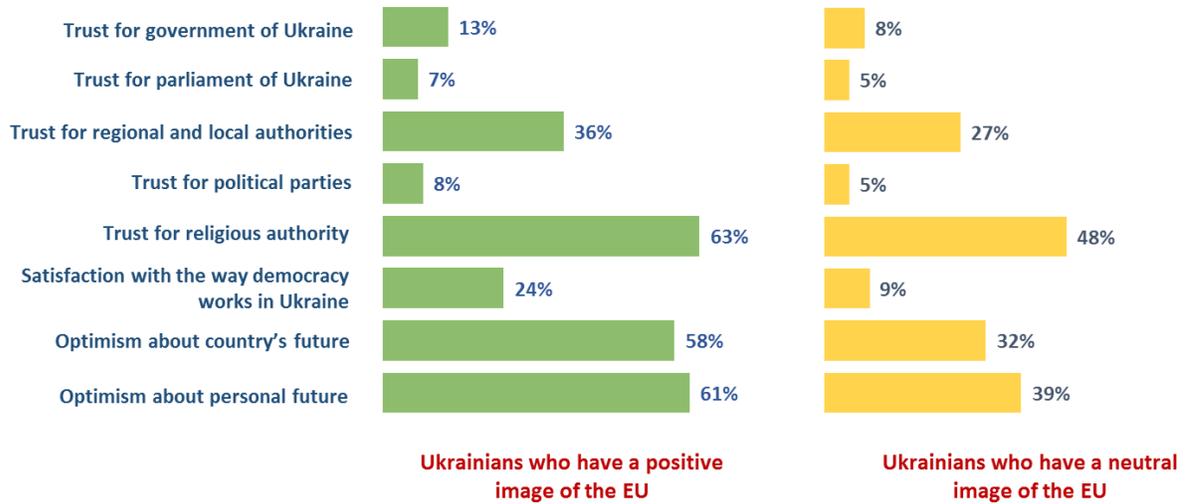
As described in section 3.2.2, the views of the country and attitude towards the EU have been analysed according to two main profiles: individuals who have a positive attitude towards the EU and those who are mostly neutral.¹⁹ Eight indicators were considered: trust in the government, trust in the parliament, trust in regional and local authorities, trust in political parties, trust in religious authority, satisfaction with the functioning of democracy, optimism about the country's future and optimism about the respondent's personal future.

The first thing that should be noted is that, unsurprisingly, individuals who have a positive image of the EU are also more likely to be more positively oriented for all the assessed indicators, in comparison to the neutral population (fig. 27).²⁰ The gap between the two populations tends to shrink when it comes to trust in parliament, government and political parties (between 2 and 5 per cent) and is at its widest when it comes to the level of optimism about their country's future (26 per cent) and their own personal futures (22 per cent).

¹⁹ Individuals who were mostly negatively oriented were excluded from the comparison, as their number was too small for the results to be statistically significant.

²⁰ More details on the main findings are provided in Annex, Table A7.

FIGURE 27 – Views of the country and attitude towards the EU: positive versus neutral



The majority of Ukrainians, regardless of their attitude towards the European Union (positive or neutral), indicated the same pressing problems in Ukraine, with corruption (47%), unemployment (36%-37%) and economic crisis (34% of people with a positive image of the EU and 42% of neutrally oriented people) being the top three priority issues for the country.²¹

²¹ More details on the main findings are provided in Annex, Table A8.

4. Annex

TABLE A1 – Benefits from current EU support

Q2.8. To what extent would you say that Ukraine has benefitted from the current European Union support in the following areas?						
	Very much	Fairly	Not very much	Not at all	Don't know	Total
More tourism	9%	28%	25%	27%	11%	100%
Access to more products and services	7%	30%	32%	24%	7%	100%
Improved trade	5%	28%	35%	24%	9%	100%
Better education	2%	14%	34%	41%	9%	100%
Improved infrastructure	3%	11%	35%	45%	7%	100%
Improved democracy	1%	12%	39%	36%	13%	100%
Better law enforcement	1%	12%	42%	36%	9%	100%
Greater employment opportunities	2%	10%	36%	45%	7%	100%
Improved agricultural production	3%	8%	33%	43%	12%	100%
Improved quality of the healthcare system	2%	8%	37%	46%	7%	100%
Greater economic development	2%	8%	39%	43%	8%	100%
Improved quality of the justice system	2%	7%	30%	51%	9%	100%
Less corruption	1%	4%	30%	57%	6%	100%

Percentages refer to Ukrainians who have heard about the EU

TABLE A2 – Areas in which the EU should play a greater role

Q2.9. Please tell us in which sectors you think the European Union should play a greater role		
	The specific item was selected as the first most important area	The specific item was selected as the first or second or third most important area
Promote economic development	32%	65%
Reduce corruption	22%	49%
Create greater employment opportunities	10%	40%
Promote better education	7%	19%
Improve infrastructure	5%	19%
Improve agricultural production	5%	16%
Promote better law enforcement	4%	13%
Improve quality of the healthcare system	4%	25%
Improve democracy	2%	12%
Improve trade	2%	9%
Improve quality of the justice system	2%	16%
Promote access to more products and services	1%	6%
Increase tourism	1%	4%

Percentages refer to Ukrainians who have heard about the EU

TABLE A3 – Attitudes towards the EU: positive versus neutral

		Image of the EU	
		Positive	Neutral
Trust towards the EU	Tend to trust	90%	48%
	Tend not to trust	6%	33%
	Don't know	4%	19%
	<i>Total</i>	100%	100%
Relations between the EU and Ukraine	Good	80%	56%
	Bad	8%	18%
	Don't know/No relations	12%	26%
	<i>Total</i>	100%	100%
Awareness of financial support by the EU	Yes	72%	51%
	No	9%	20%
	Don't know	19%	29%
	<i>Total</i>	100%	100%
Effectiveness of the EU's support	Effective	46%	28%
	Not effective	40%	65%
	Don't know	14%	7%
	Total	100%	100%

Percentages refer to Ukrainians who have heard about the EU

TABLE A4 – Trust towards different types of media

Q3.9. & Q3.10. Which is your level of trust for the following media as a source of information?				
	Tend to trust	Tend not to trust	Don't know	Total
Official EU website	23%	22%	55%	100%
Television	47%	34%	19%	100%
Radio	25%	30%	45%	100%
Print media	29%	36%	35%	100%
Social media	33%	25%	42%	100%
Internet	39%	21%	40%	100%
Word of mouth	68%	16%	16%	100%
Country's media in Ukrainian				
Country's media in Ukrainian	51%	29%	20%	100%
Country's media in Russian				
Country's media in Russian	35%	40%	25%	100%
Country's media in other languages				
Country's media in other languages	12%	33%	55%	100%
Foreign media in Russian				
Foreign media in Russian	20%	42%	38%	100%
Foreign media in other languages				
Foreign media in other languages	12%	33%	55%	100%

TABLE A5 – Type of media frequently used as a source of information and attitude towards the EU

		Type of media frequently used as source of information (Q3.8)		Word of mouth frequently used as source of information (Q3.8)	
		Only traditional media	Social media or internet	Yes	No
Perception of the EU	Positive	35%	59%	43%	44%
	Neutral	44%	24%	32%	41%
	Negative	18%	12%	19%	12%
	Don't know	3%	5%	6%	3%
	Total	100%	100%	100%	100%
Trust towards the EU	Tend to trust	57%	66%	57%	59%
	Tend not to trust	30%	23%	29%	29%
	Don't know	13%	11%	14%	12%
	Total	100%	100%	100%	100%
Relations between the EU and Ukraine	Good	55%	64%	54%	66%
	Bad	21%	10%	18%	15%
	Don't know/No relations	24%	26%	28%	19%
	Total	100%	100%	100%	100%
Awareness of financial support by the EU	Yes	57%	57%	56%	57%
	No	21%	13%	18%	17%
	Don't know	22%	30%	26%	26%
	Total	100%	100%	100%	100%
Effectiveness of the EU's support	Effective	27%	44%	37%	33%
	Not effective	59%	41%	51%	50%
	Don't know	14%	15%	12%	17%
	Total	100%	100%	100%	100%

Percentages refer to Ukrainians who have heard about the EU

TABLE A6 – Frequent usage of media in Russian and attitude towards the EU

		Frequently used media in Russian	
		Yes	No
Perception of the EU	Positive	49%	39%
	Neutral	33%	37%
	Negative	14%	19%
	Don't know	4%	5%
	Total	100%	100%
Trust towards the EU	Tend to trust	63%	53%
	Tend not to trust	27%	31%
	Don't know	10%	16%
	Total	100%	100%
Relations between the EU and Ukraine	Good	60%	56%
	Bad	14%	19%
	Don't know/No relations	26%	25%
	Total	100%	100%
Awareness of financial support by the EU	Yes	58%	55%
	No	14%	21%
	Don't know	28%	24%
	Total	100%	100%
Effectiveness of the EU's support	Effective	43%	29%
	Not effective	45%	56%
	Don't know	12%	15%
	Total	100%	100%

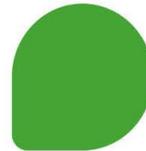
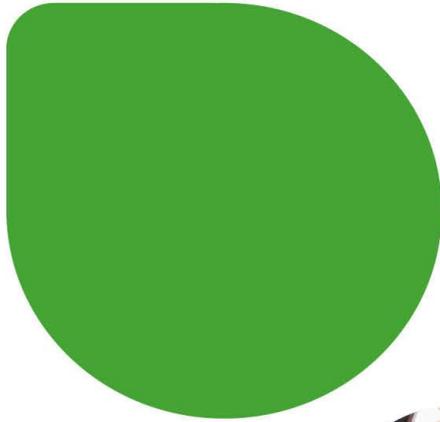
Percentages refer to Ukrainians who have heard about the EU

TABLE A7 – Views of the country and attitude towards the EU: positive versus neutral

		Attitude towards the EU	
		Positive	Neutral
Trust for government of Ukraine	Tend to trust	13%	8%
	Tend not to trust	81%	85%
	Don't know	6%	7%
	Total	100%	100%
Trust for parliament of Ukraine	Tend to trust	7%	5%
	Tend not to trust	84%	90%
	Don't know	9%	5%
	Total	100%	100%
Trust for regional and local authorities	Tend to trust	36%	27%
	Tend not to trust	50%	59%
	Don't know	14%	14%
	Total	100%	100%
Trust for political parties	Tend to trust	8%	5%
	Tend not to trust	79%	87%
	Don't know	13%	8%
	Total	100%	100%
Trust for religious authority	Tend to trust	63%	48%
	Tend not to trust	19%	38%
	Don't know	18%	14%
	Total	100%	100%
Satisfaction with the way democracy works in Ukraine	Yes	24%	9%
	No	67%	78%
	Don't know	9%	13%
	Total	100%	100%
Optimism about country's future	Optimistic	58%	32%
	Pessimistic	34%	58%
	Don't know	8%	10%
	Total	100%	100%
Optimism about personal future	Optimistic	61%	39%
	Pessimistic	32%	48%
	Don't know	7%	13%
	Total	100%	100%

TABLE A8 – Most pressing problems in Ukraine

Q4.2. What do you consider to be the most pressing problems facing your country? (multiple answers possible)		
	Attitude towards the EU	
	Positive	Neutral
Corruption	47%	47%
Security issues / war	39%	38%
Unemployment	37%	36%
Economic crisis	34%	42%
Low salaries / pensions	33%	30%
Low living standard, poverty	29%	41%
High prices and taxes	24%	20%
Territorial conflicts	13%	10%
Unaffordability of healthcare	8%	11%
Education quality	6%	1%
Absence of rule of law	5%	9%
Migration	3%	0%



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