



ANNUAL SURVEY REPORT:
UKRAINE

5th Wave (Spring 2020)

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

MARCH 2020

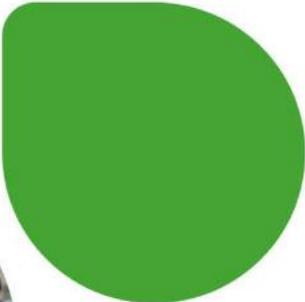
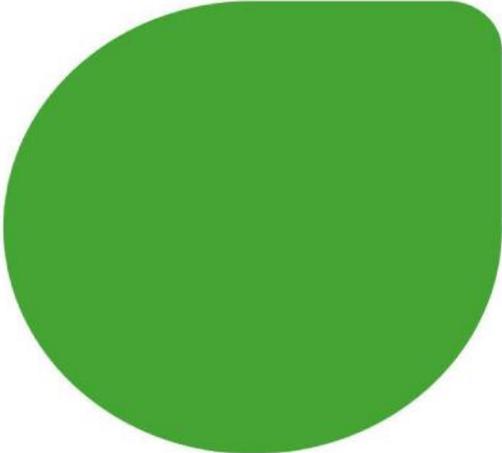


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*The surveys have been carried out in the six Eastern partner countries by ACT LLC
and their network partners*

1. Background

In February 2020, a fifth wave of annual surveys was carried out across the six Eastern partner countries (Armenia, Azerbaijan, Belarus, Georgia, the Republic of 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 the EaP countries.

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

The purpose of the annual surveys is to investigate the opinion and the level of information that citizens of the EaP countries have on the EU in general and, in particular, on EU-funded cooperation and development programmes/projects. In order to monitor changes over time, the surveys are being carried out annually from 2016 until 2020.

This document presents the results of the **5th wave of annual surveys** (Spring 2020 – **before COVID-19 crisis**) conducted in **UKRAINE**¹ and is organized around four main sections:

- **General perceptions of the EU**
This section looks at how citizens perceive the EU's image, the relationship between their country and the EU, their awareness of the EU's financial support and their opinion of its benefits, as well as their level of trust towards the EU, also compared with the role of other foreign institutions. During the third wave, a new set of questions that touched upon perceived myths about the EU, was also added, in order to gather greater insights on how the EU is perceived by citizens.
- **Sources of information**
This section looks at the main sources of information in the country, both in the national language and other foreign languages. Specific focus is placed on EU-related information, programmes financed by the EU and its institutional communication instruments.
- **Country evaluation and future expectations**
This section provides an assessment of how citizens view their country's and their personal future. Specific focus is placed on the current functioning of democracy and most pressing concerns.
- **Profiling attitudes towards the EU**
This section is dedicated to profiling citizens with a positive and a neutral stance towards the EU. Attitudes are profiled against a comprehensive set of indicators, such as the main socio-demographic characteristics, passive and active exposure to EU-related information, awareness and effectiveness of EU's financial support, level of trust towards the EU and other foreign institutions, perceptions of the country's and personal future and main concerns, and common beliefs about the EU.

All sections, together with an analysis of the results of the 5th wave of the survey, also provide comparisons between the findings of the 2019, 2018, 2017 and 2016 surveys where relevant.

¹ A similar report has been produced for each Eastern partner country. In addition, a macro-area/regional overview report that compares the results across the region is available.

2. Research methodology in brief

The survey (field work) took place between February and March 2020 (before COVID-19 crisis), following the same methodology adopted in the previous rounds of data collection (Spring 2019, 2018, 2017 and 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 stratified by unit size, expressed in terms of population, 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. The calibration variables were the same as those used in the previous wave (settlement size, gender, age, employment status, geographical area, education level, religion and mother tongue).

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) / Capital.

³ Geographical areas: 1) Centre (Sumy, Mykolaiv, Kyiv, 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 of the EU

- **Around half of Ukrainian citizens (51%, down 5% since 2019) have a positive image of the EU**, around one third (35%, up 6%) feel ‘neutral’ about it and one tenth (12%) hold a negative view. **Only 2% of citizens have ‘no opinion’ or ‘have never heard of the EU’.**
- **Most Ukrainians have a positive opinion of the EU and over 63% of them link it ‘strongly’ or ‘very strongly’ with all proposed values** – and particularly ‘economic prosperity’ and ‘human rights’ (81%, both), which are also respectively second (37%) and third (36%) as personal values. **‘Peace, security and stability’ continues to be the most important personal value for three quarters of Ukrainians (73%).** The same share ‘strongly’ links their primary value with the EU, confirming the acknowledgement of the EU’s support for the territorial integrity of Ukraine.
- **The EU continues to be the most trusted foreign institution (66%, up 3% since last year).** Compared to 2019, more citizens trust both the United Nations (52%, up 7%) and the NATO (50, up 5%). By contrast, the EAEU has the lowest level of trust (26%), with 51% of citizens oriented towards not trusting it.

EU relations with Ukraine and awareness of EU financial support

- **64% of Ukrainians describe the relations between their country and the EU as ‘good’; 62% of citizens are also aware that the EU financially supports Ukraine**, and **46% of them consider it ‘effective’**, with no significant changes compared to 2019.
- **Half of the citizens who are aware of EU’s financial support know about specific programmes. The most well-known relate to the field of ‘education’ and their popularity is growing each year: 58% of citizens aware of some specific programmes financed by the EU mentioned education projects (up 7% since 2019 and up 15% since 2018).** In fact, more and more Ukrainians are taking advantage of educational, academic and cultural opportunities provided by EU’s programs, such as ‘Erasmus+’, ‘Creative Europe’ and ‘Horizon 2020’.
- **With each passing year, the impacts of the implementation of the Association Agreement and the visa-free regime are more appreciated by citizens.** In 2020, most Ukrainians reckoned the **benefits of the EU’s support (and closer integration with it) as ‘greater access to products and services’ (65%, up 7%), ‘more tourism’ (63%, up 5%) and ‘improved trade’ (56%, up 2%).**

Media usage as sources of information

- **As in previous waves, television and ‘word of mouth’ continue to be the most popular sources of information in the country** – only 13% and 12% of Ukrainians respectively ‘never’ rely on them. However, Ukrainians are increasingly turning to the Internet and social media: half of citizens ‘always’ or ‘often’ use them.
- **The usage of national media in both Ukrainian and Russian is very common in the country: nearly all citizens use national media in Ukrainian (92%) and/or Russian (83%).** The usage of foreign media in Russian (54%) is more limited – due to the restrictions over Russian TV channels and the decrease in popularity following the Donbas conflict. Less than one in five citizens rely on national and/or foreign media in other languages (18% and 15% respectively).

Sources of information about the EU

- **58% of Ukrainians claim to have seen or heard information about the EU in the last three months**, with no change compared to 2019 and **EU-related information is increasingly**

disseminated by digital media, through the Internet (40% of Ukrainians who have seen/heard information about the EU did so through this media, up 6%) and social media (38%, up 8%).

- Compared to 2019, frequent access to information on the EU has seen a slight decrease (from 17% to 13%) while sporadic access has slightly increased (40%, up 2%). Most ‘active searchers’ looked for information through the Internet (58%, up 12%) and/or social media (46%, up 13%). Almost 60% of Ukrainians who search for information about the EU do it in Russian (57%) versus 42% who searched in their national language. Only a tiny minority use English (1%).
- In 2020, ‘active searchers of EU-related information’ seem more interested in ‘general information’ (46%, up 8%) and ‘lifestyle in the EU’ (31%, up 7%), as well as ‘the relation between their country and the EU’ (36% up 5%) and ‘other EaP countries’ (12%, up 4%). ‘Opportunities offered by the EU’ (21%, up 6%) and ‘education and cultural programmes’ (18%, up 1%) also attracted more interest than last year.
- As in previous waves, the assessment of the quality of EU-related information is very positive. **Around three quarters or more of ‘active searchers’ provided a ‘very’ or ‘quite positive’ rating in terms of all assessed indicators:** more specifically 92% find it ‘accessible’, 90% ‘user-friendly’, 78% ‘comprehensive’, 76% ‘reliable’, and 74% ‘trustworthy’.

View of Ukraine’s current situation

- **Citizens appear more positive after the outcome of 2019 elections** and a decline in distrust regarding the country’s institutions was observed – **despite the very low levels of confidence** compared to other EaP countries. **The most trusted bodies** – aside from the religious authority (52%) – are **regional and local public institutions** (41%, up 5%), followed by the government (30%, up 10%) and the Parliament (23%, up 7%). Only 18% of citizens trust political parties.
- Accordingly, only 31% of Ukrainians are satisfied with the way democracy works in their country – nevertheless the trend is increasing (up 2% since 2019 and up 17% since 2016). **The assessment of the values that Ukrainians believe to apply to their country is also slightly more positive** than last year. **Around half of citizens are convinced that ‘gender equality’ (58%), ‘freedom of speech’ (56%), ‘free and fair elections’ (52%) and ‘freedom of the media’ (48%) are guaranteed in Ukraine** – in 2019 only ‘gender equality’ exceeded the 50% threshold and ‘free and fair elections’ stood at 24%.
- Most Ukrainians continue to be ‘not optimistic’ about the future of their country (55%), with no significant change compared to 2019 (up 3%). Future personal prospects are more positive and 58% of citizens are ‘optimistic’ (up 4% since 2018 and up 16% since 2016). **Their concerns have remained stable over time: 49% are worried about ‘low living standards and poverty’ and 37% about ‘security and war’ – their two primary concerns.** Around one third of citizens is also worried about ‘corruption’ (32%), ‘economic crisis’ (31%), ‘unemployment’ (30%) and ‘salaries and pensions’ (29%).

Profiling attitudes towards the EU: positive versus neutral

- **Holders of a positive view of the EU represent the majority of Ukrainians** – 51% of the total population (down 5% since 2019) – while **Ukrainians with a ‘neutral’ view of the EU account roughly for one third of the population** (35%, up 6%).
- **EU supporters tend to be more concentrated among the younger generations** (38% versus 30% for the ‘neutral’ population), **most-educated citizens** (52% versus 42%), **Ukrainian speakers** (82% versus 74%) and **residents of west of the country** (41% versus 27%)
- By contrast, **‘neutral’ citizens are more likely to be middle-aged** (41% versus 24% of EU supporters), **have a lower level of education** (58% versus 48% for the EU supporters) and **live in smaller settlements** (54% versus 50%). In addition, **26% are native Russian speakers** (18% among EU supporters); **accordingly they are more likely to be settled in the east of the country** (36% versus 24%), where there is a higher concentration of ethnic Russian and native Russian speakers.

- **Half of ‘neutral’ citizens have not heard any information about the EU in the three months preceding the survey (56%), nor have they searched for it (50%)** – the respective figures for EU supporters stands respectively at 29% and 37%. **‘Neutral’ citizens tend also to prefer traditional media (34% versus 20%)** whereas **EU supporters are more keen users of new media** – 73% ‘frequently’ use the Internet and social media – **and media in the national language (70%)** – it is 54% and 56% respectively for the ‘neutral’ population. If actively searching, EU supporters are more interested in ‘opportunities offered by the EU’ (26% versus 17%) and ‘education and cultural programmes’ (21% versus 15%) – which may be linked to the fact that they are a ‘younger’ population.
- **‘Neutral’ citizens tend to be less informed about the role of foreign institutions** – around one in five citizens could not rate its level of trust in the UN and the EEAU – and more careful in evaluating the nature of the relationship with their country. **Only the EU is trusted by the majority of the population (51% versus 91% for EU supporters)**, whereas trust in the NATO stands at 30% (versus 73%). Half of neutrally oriented citizens acknowledge EU’s financial support (51%) and only 30% of ‘aware’ citizens consider it effective (75% and 59% respectively for EU supporters).
- **When it comes to common beliefs, individuals holding a neutral image of the EU are again less positive than EU supporters. However, compared to 2019 their levels of agreement are greater.** The highest rate of approval was recorded for the statement that ‘the EU is an independent actor in foreign relations’ (74%, up 8% since 2019). More ‘neutral’ citizens also agreed with the statement that ‘the EU fosters the preservation of traditional values in our society’ (58%, up 15%).
- **Levels of optimism are not so high among ‘neutral’ citizens – and particularly with regard to the future of their country (63% are ‘not optimistic’ versus 40% of EU supporters).** In fact, **‘neutral’ citizens seem more concerned with the current economic situation** and all related issues such ‘low living standards and poverty’ (45%), ‘unemployment’ (33%), ‘low salaries and pensions’ (32%), ‘high prices and taxes’ (26%) and the ‘unaffordability of the healthcare’ (23%).

3.2. Perceptions of the European Union

Around half of Ukrainian citizens (51%) have a positive image of the EU, around one third (35%) feel 'neutral' about it and one tenth (12%) hold a negative view. The EU continues to be the most trusted foreign institution (by 66% of citizens) and 64% of Ukrainians describe the relations between their country and the EU as 'good'. Most citizens are also aware of the financial support provided by the EU to Ukraine (62%) and 46% of them consider it 'effective'. The most well-known EU-financed programmes in Ukraine relate to the field of 'education' and their popularity is growing each year, together with the acknowledgement of the impacts of the implementation of the Association Agreement and the visa-free regime. In 2020, most Ukrainians identified the benefits of the EU's support (and closer integration with it) as 'greater access to products and services' (65%, up 7%), 'more tourism' (63%, up 5%) and 'improved trade' (56%, up 2%).

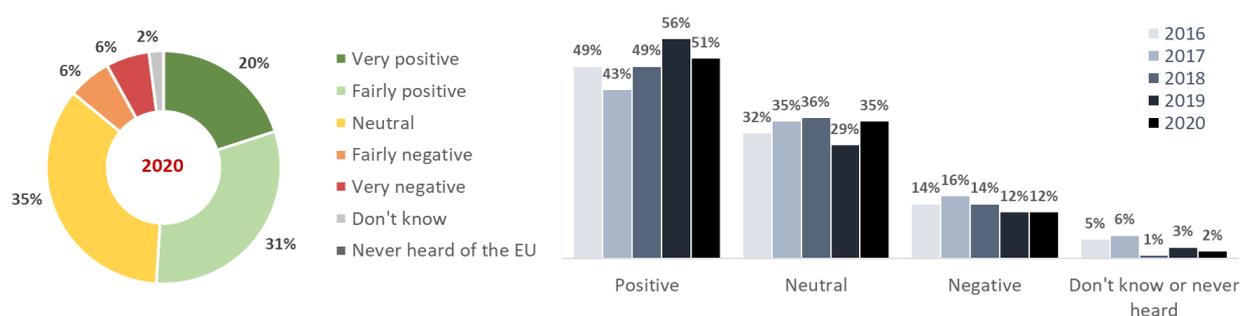
This section looks at how Ukrainian citizens perceive the EU's image and their opinion of the benefits of the EU's financial support, also compared with the role of other foreign institutions.

3.2.1. General perceptions of the EU

Around half of Ukrainian citizens (51%) have a positive image of the EU, around one third (35%) feel 'neutral' about it and one tenth (12%) hold a negative view. Findings are in line with 2019, although a slight increase in neutral perceptions was observed (up 6%) primarily at the expenses of positive opinions (down 5%). Only 2% of Ukrainians have 'no opinion' or 'have never heard of the EU'.

Attitudes towards the EU largely depend on age, mother tongue and level of education⁶. Younger citizens are more likely to be 'positive' (60% versus 46% for those aged 35-54 and 48% for those who are over 55) together with native Ukrainian speakers (55% versus 41% of native Russian speakers) and highly educated individuals (59% versus 51% of those with lower levels of education). At the geographical level, the west – reflecting both its favourable location on the EU border and the lower prevalence of native Russian speakers – produces more positive views (63%) than the centre (50%) and, particularly, the east (40%)⁷.

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



⁶ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 1.

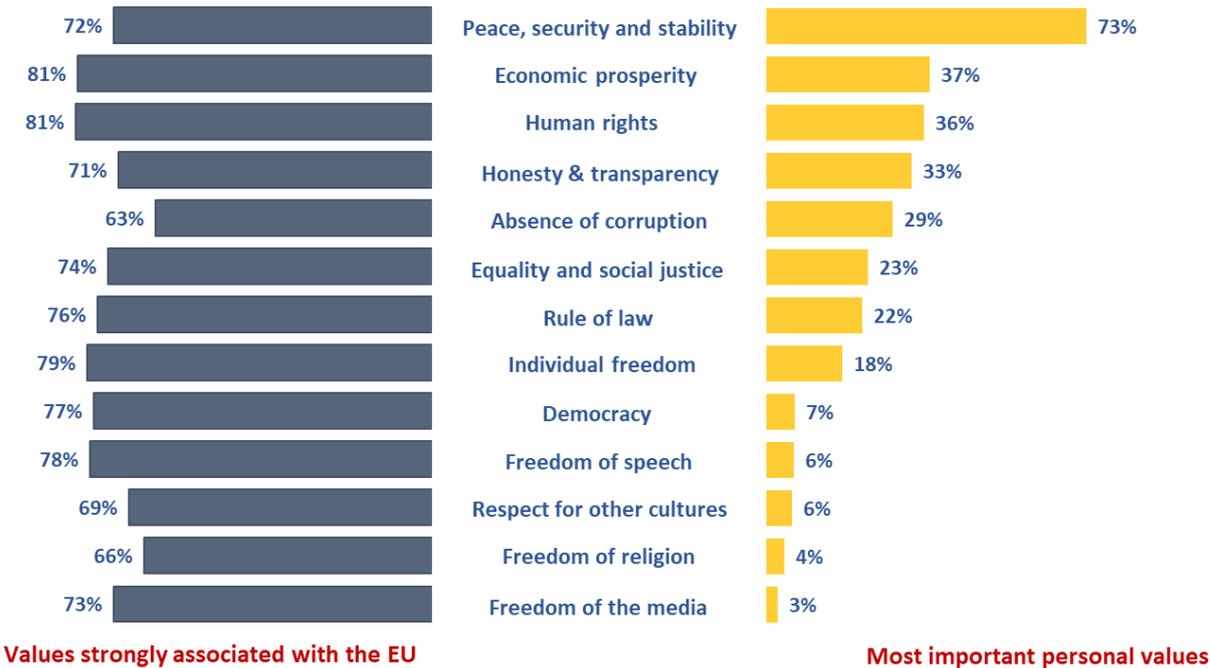
⁷ According to a 2017 poll conducted nationwide by the Gorshenin Institute – in partnership with the Kyiv Office of the Friedrich- Ebert-Stiftung – ideas about European values are fragmentary and contradictory, although Ukrainians largely share the basic values of European institutions. Ukrainians' ideas about European values largely depend on the region of residence and age and they are most significant to younger respondents and those living in Western Ukraine. First, Western Ukraine became part of the Soviet Union two decades later than its eastern territories. Second, residents of Eastern and Southern Ukraine seem also more vulnerable to political populism, which affects their perceptions of European values. Third, older citizens share an increased inclination towards paternalism and nostalgia for the certainty and benefits that existed in the Soviet Union. Fourth, differences may also be due to the type of employment prevailing in specific regions: for instance, there are much larger enterprises in industry, mining, and agriculture in Eastern Ukraine that used to ensure the existence of entire population centres, enforcing the feeling that a person's well-being depends on external factors rather than themselves. (Source: *How Ukrainians Perceive European Values, Main Results of an Empirical Survey, Friedrich- Ebert-Stiftung, 2017*).

In general, most Ukrainians have a positive opinion of the EU and over 63% of them link it ‘strongly’ or ‘very strongly’ with all proposed values⁸ – and particularly ‘economic prosperity’ and ‘human rights’ (81%, both), which are also respectively second (37%) and third (36%) front runners as personal values.

‘Peace, security and stability’ continues to be the most important personal value for 73% of Ukrainians: despite negotiations, no real breakthrough in the Donbas conflict has in fact taken place⁹. At the same time, 72% of citizens ‘strongly’ or ‘very strongly’ link their primary value with the EU, confirming the acknowledgement of the EU’s support for the territorial integrity of Ukraine¹⁰. Around one third of Ukrainians also mentioned ‘honesty and transparency’ (33%) and ‘absence of corruption’ (29%) among the main personal values, confirming the demand for combating the issue in the country.

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 of the EU)



The great majority of Ukrainians (70%) are also largely confident that ‘the EU fosters the preservation of traditional values in their society’¹¹. Compared to 2019, their opinions are slightly more positive (up 5 percentage points).

⁸ More details are provided in Annex – Table 2.
⁹ According to a 2018 poll conducted nationwide by the International Republican Institute’s (IRI) Centre for Insights in Survey Research, more than half of all respondents cited the ‘war/expansion of the conflict in Ukraine’ as the greatest threat to their way of life and their children’s future. The percentage who view the conflict as one of the three most important issues facing the country rose from 41 percent in March 2018 to 53 percent in August. A clear majority (71%) of respondents believe that state authorities should ‘end the war in the Donbas’ to increase trust in the government. Source: <https://www.iri.org/resource/new-ukraine-poll-reveals-increased-concern-over-military-conflict-donbas>.
¹⁰ See also Figure 16.
¹¹ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European Union is perceived by the citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale (‘strongly’, ‘somewhat’, ‘not really’, ‘not at all’, or ‘don’t know’): ‘the EU fosters the preservation of traditional values in our society’, ‘the EU provides tangible benefits to citizens in their everyday lives’, ‘the EU is committed to fighting corruption’, ‘the EU is an independent actor in foreign relations’ and ‘integration with the EU increases the country’s security and stability’.

FIGURE 3 – ‘The EU fosters the preservation of traditional values in our society’.

To what extent do you agree with this statement about the EU?

(Percentages refer to Ukrainians who have heard of the EU)



Perceptions of the EU were also assessed through an open-ended question, whereby respondents were asked to name the first issues that came to their mind when thinking of the EU. As in 2019, positive associations were widely recorded, the most common being ‘economic prosperity/high standards of living’ (26%) and ‘rule of law/human rights and equality’ (11%) – confirming findings on strong linkages with the EU (see Figure 2). Around 5% of citizens also linked the EU with ‘peace and stability’, ‘development and progress’, ‘employment’ and/or ‘great opportunities for personal growth and development’ (5%). 7% of Ukrainians openly ‘do not trust the EU’ – versus 3% who ‘feel committed’ to it – and 12% found the question ‘too hard to answer’.

Ukraine is a member of several international organisations, including the United Nations (UN). It has concluded an Association Agreement with the EU, aspires to be a member of the North Atlantic Treaty Organisation (NATO) and is an observer to the EAEU. Among these, **the EU continues to be the most trusted foreign institution (66%, up 3%). Compared to 2019, more citizens trust both the United Nations (52%, up 7%) and the NATO (50, up 5%)** – aligning with views of Zelensky’s ruling party¹². By contrast, the EAEU has the lowest level of trust (26%), with most citizens ‘not trusting it’ (51%).

Trust in the EU is widespread in all socio-demographic groups and strongly linked to pro-EU attitudes. Younger (76%) and highly-educated (69%) citizens, native Ukrainian speakers (67%) and western residents (75%) are all much more likely to ‘trust the EU’ than their socio-demographic counterparts. Females too (70%) tend to hold more trust in the EU than males (60%)¹³.

¹² According to a poll was conducted on June 2019 by Rating Group Ukraine on behalf of the International Republican Institute, the number of Ukrainians who support joining the North Atlantic Treaty Organization (NATO) has grown to the highest level since 2014, reaching 53%. When answering about the benefits of NATO membership, 44% of people who support joining the Alliance believe that it would defend Ukraine, 46% say it would help to increase the standards of Ukraine’s defense system and 6% say it would help to elevate the country’s international prestige. The idea of the referendum about joining NATO was brought to the public by President Volodymyr Zelensky back in March 2019 when he was campaigning for the presidency. Zelensky claimed that though he supports both joining NATO and the European Union, these issues should be decided by national referendum. (See: <https://www.iri.org/resource/kyiv-post-cites-new-ukraine-poll-nato-support-grows-ukraine-reaches-53-percent>).

¹³ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 3.

FIGURE 4 – Trust towards different institutions (Q2.11)
(Percentages refer to Ukrainians who have heard of the EU)

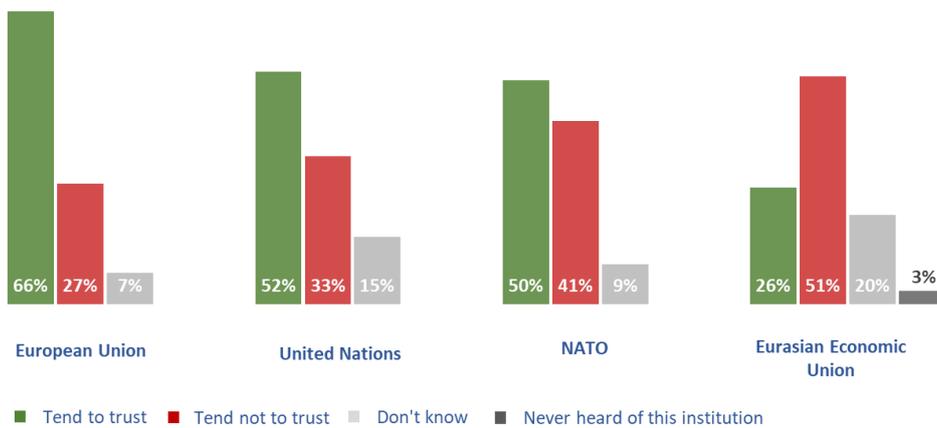
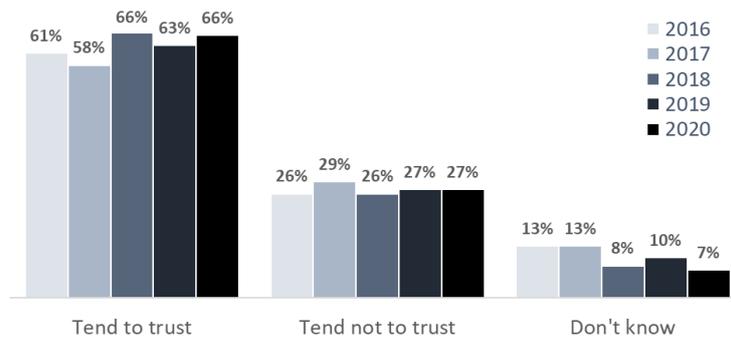


FIGURE 5 – Trust towards the EU (Q2.11)
(Percentages refer to Ukrainians who have heard of the EU)



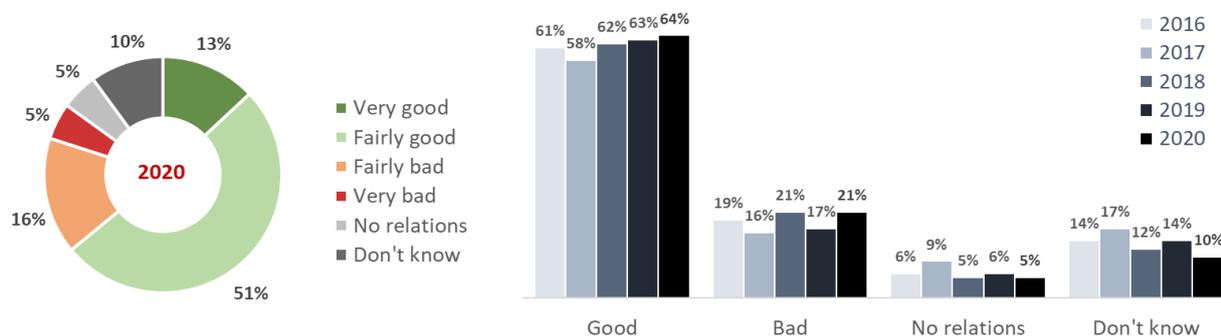
3.2.2. EU relations with Ukraine and awareness of EU financial support

More than 60% of Ukrainians describe the relations between their country and the EU as ‘fairly good’ (51%) or ‘very good’ (13%), with no change compared to last year. Again, younger citizens (73%) and native Ukrainian speakers (66%) are much more positive in their opinions than middle-aged and elder citizens (60% both), as well as those who have Russian as their mother tongue (59%). As for geographical residence, 69% of western residents consider the relations between Ukraine and the EU as ‘good’ versus 64% of eastern residents and 60% of individuals living in the centre of the country¹⁴.

¹⁴ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 4.

FIGURE 6 – In general, how would you describe the relations that the European Union has with your country? (Q2.4)

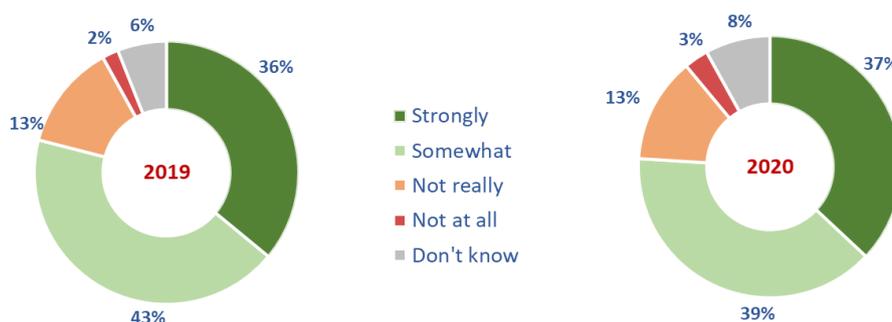
(Percentages refer to Ukrainians who have heard of the EU)



The overwhelming majority of Ukrainians perceive ‘the EU as an independent actor in foreign relations’ (76%), in line with 2019¹⁵ and confirming the acknowledgement of the EU’s support for the territorial integrity of Ukraine (see Figure 2).

FIGURE 7 – ‘The EU is an independent actor in foreign relations’. To what extent do you agree with this statement about the EU?

(Percentages refer to Ukrainians who have heard of the EU)



Currently 62% of citizens know that the EU financially sustains their country, slightly more than in 2019 (up 5 percentage points). Ukrainians appear to be also more confident in this regard and the share of individuals answering ‘do not know’ has nearly halved since last year (11%, down 9%).

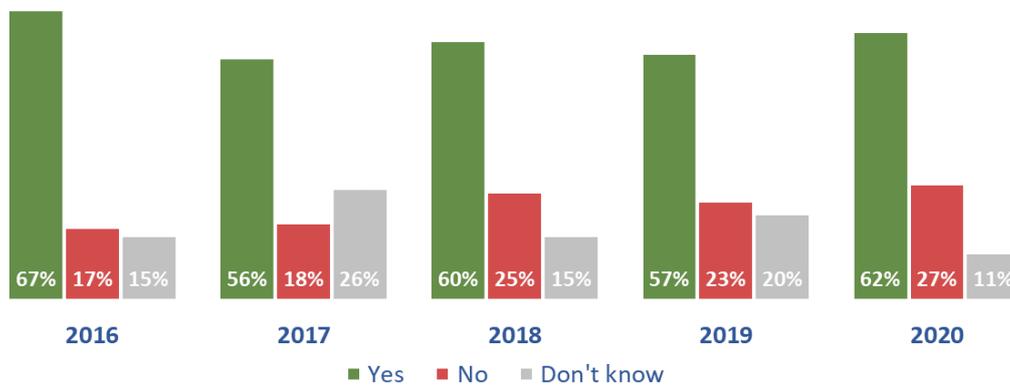
It is worth noting that native Russian speakers – who are the most likely to ‘deny’ EU’s financial support (36%) – are also quite confident in their opinions (only 7% answered ‘don’t know’) while native Ukrainian speakers are more keen to acknowledge it (64%) and nonetheless more unsure (12%). By contrast, older citizens and those with a lower level of education are more critical and more unsure (around 45% both)¹⁶.

¹⁵ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European Union is perceived by the citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale (‘strongly’, ‘somewhat’, ‘not really’, ‘not at all’, or ‘don’t know’): ‘the EU fosters the preservation of traditional values in our society’, ‘the EU provides tangible benefits to citizens in their everyday lives’, ‘the EU is committed to fighting corruption’, ‘the EU is an independent actor in foreign relations’ and ‘integration with the EU increases the country’s security and stability’.

¹⁶ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 5.

FIGURE 8 – As far as you know, does the European Union provide Ukraine with financial support? (Q2.5)

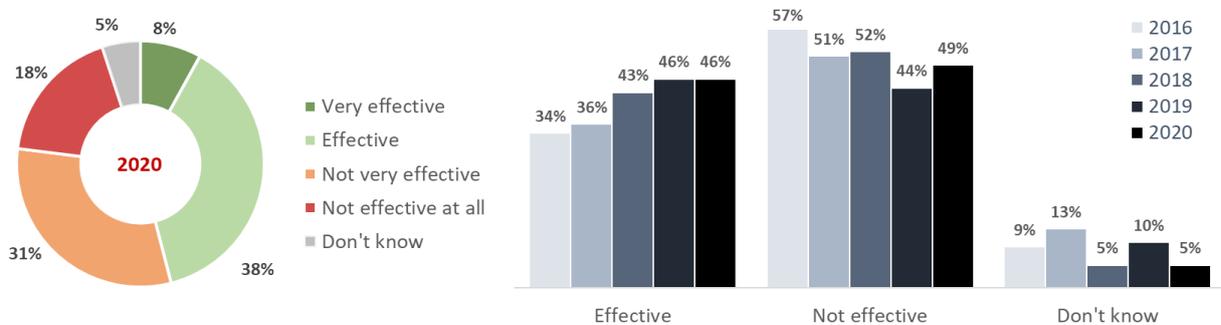
(Percentages refer to Ukrainians who have heard of the EU)



Around half of Ukrainians who are aware of EU’s support consider it ‘effective’ (46%), with no change compared to 2019. Most younger individuals (56%), eastern (57%) and western residents (52%), living in middle-sized and large settlements (50%) are positive about it. By contrast, only 32% of residents of the centre of the country, 37% of middle-aged individuals, 40% of native Russian speakers and 44% of elder citizens consider EU’s support ‘effective’¹⁷.

FIGURE 9 – 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)



Half of the citizens who are aware of EU’s financial support know about specific programmes in Ukraine (49%, down 7% since 2019). Males (53%), younger generations (57%) and highly educated (54%) seem more informed than their socio-demographic counterparts – possibly because they may be the preferred ‘beneficiaries’, especially of education programmes. EU-funded programmes are also relatively more well-known in the east (52%) and the west (49%) than the centre of the country (45%)¹⁸.

¹⁷ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 6.

¹⁸ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 7.

FIGURE 10 – Do you know of any specific programmes financed by the European Union in Ukraine? (Q2.6)

(Percentages refer to Ukrainians who were aware of the EU’s financial support)



The most well-known EU-financed programmes in Ukraine relate to the field of ‘education’ and their popularity is growing each year: 58% of citizens aware of some specific programmes financed by the EU mentioned projects in this field (up 7% since 2019 and up 15% since 2018). In fact, more and more Ukrainians are taking advantage of educational, academic and cultural opportunities provided by EU’s programs, such as ‘Erasmus+’, ‘Creative Europe’ and ‘Horizon 2020’¹⁹. Between 25% and 30% of citizens aware of EU-funded programmes mentioned projects in the areas of ‘economic reform/business promotion’, ‘culture’, ‘justice and reforms’ and/or ‘energy efficiency/global warming’. In 2018, Ukraine not only signed two energy efficiency deals with the EU and the European Investment Bank, but also Ukrainian companies have been selected for the Climate Innovation Vouchers Program funded by the EU and the European Bank of Reconstruction and Development.

Less than one in ten Ukrainians have personally been (or know someone who has been) involved in recent EU-funded projects (6%).

FIGURE 11 – Which specific programme(s) do you know? (Q2.6.1, multiple answers possible)

(Percentages refer to Ukrainians who know about specific programmes financed by the EU)

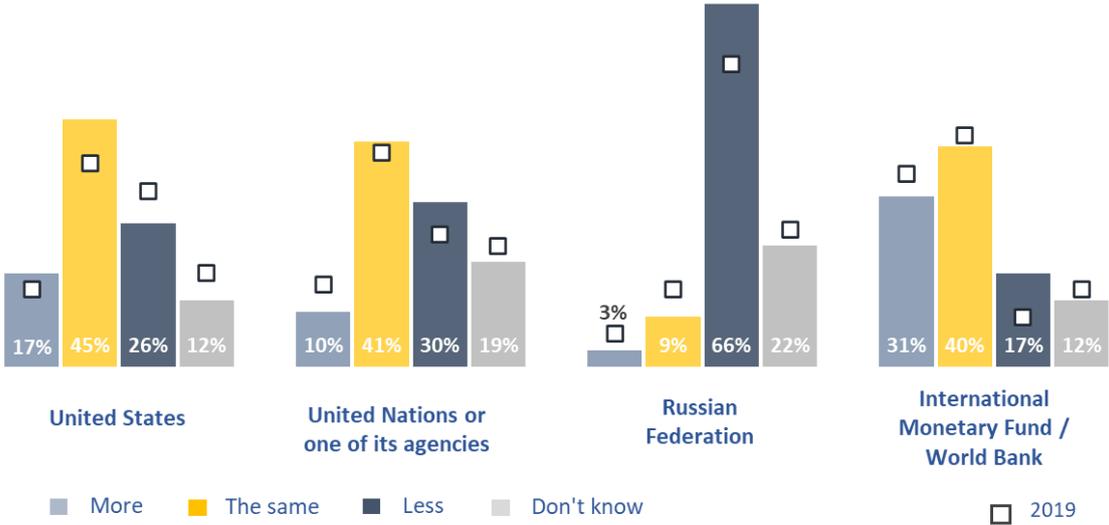


¹⁹ Analysts at the New Europe Center found that between 2004 and 2013, only 329 Ukrainian students took part in the Erasmus Mundus program (the predecessor of Erasmus+) to study in Europe. During the four years from 2014, this figure skyrocketed to 10,158 Ukrainian students. (See <https://www.atlanticcouncil.org/blogs/ukrainealert/european-integration-is-taking-root-across-ukraine-despite-russias-best-efforts/>).

The EU is perceived as an important donor to Ukraine. In fact, most Ukrainians are convinced that it financially supports their country to ‘the same’ extent or ‘more’ than the Russian Federation (75%), the United States of America (71%), the United Nations and its agencies (71%) and the International Monetary Fund/World Bank (57%). However, it should be noted that the level of confidence in answering this question is not so high – the proportion of those who responded ‘don’t know’ was between 12% and 22%, with more uncertainty in the case of the Russian Federation.

FIGURE 12 – 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 of the EU)



Ukrainians are also largely confident that ‘the EU provides tangible benefits to citizens in their everyday life’. Nearly 70% ‘strongly’ (25%) or ‘somewhat’ (43%) agree with the above statement²⁰. Very negative reactions were recorded for only around 6% of the population; the same share did not provide a ‘definite’ answer to the question.

FIGURE 13 – ‘The EU provides tangible benefits to citizens in their everyday lives’. To what extent do you agree with this statement about the EU?

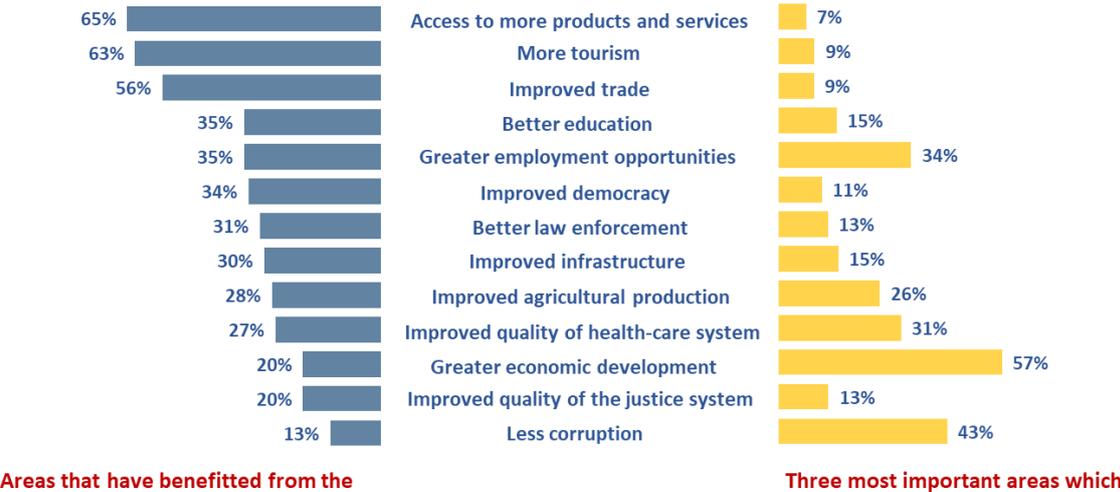
(Percentages refer to Ukrainians who have heard of the EU)



²⁰ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European Union is perceived by citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale (‘strongly’, ‘somewhat’, ‘not really’, ‘not at all’, or ‘don’t know’): ‘the EU fosters the preservation of traditional values in our society’, ‘the EU provides tangible benefits to citizens in their everyday lives’, ‘the EU is committed to fighting corruption’, ‘the EU is an independent actor in foreign relations’ and ‘integration with the EU increases the country’s security and stability’.

With each passing year, the impacts of the implementation of the Association Agreement and the visa-free regime are more appreciated by citizens. In 2020, most Ukrainians reckoned the benefits of the EU’s support (and closer integration with it) as ‘greater access to products and services’ (65%, up 7%), ‘more tourism’ (63%, up 5%) and ‘improved trade’ (56%, up 2%). By contrast, ‘fighting corruption’ remains the area that, in the eyes of the citizens, has benefitted the least from EU’s support (13%) and that would require a much stronger involvement (43%)²¹. Almost 60% of Ukrainians would also favour more support from the EU to sustain ‘economic development’ (57%) and 34% to strengthen ‘employment opportunities’²².

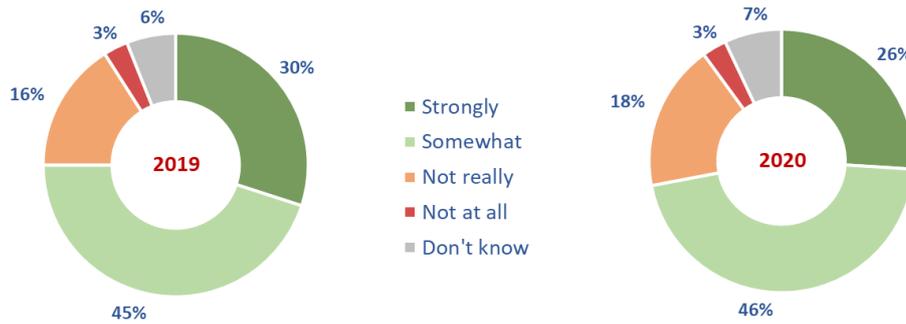
FIGURE 14 – Areas that have benefitted ‘very much’ or ‘fairly’ from EU support (Q2.8) & three most important areas in which Ukrainians request a greater role of the EU (Q2.9)
(Percentages refer to Ukrainians who have heard of the EU)



Nearly three quarters of Ukrainians are ‘strongly’ (26%) or ‘fairly’ (46%) convinced that ‘the EU is committed to fighting corruption’²³, with no significant change since last year. This question also received a very low level of ‘don’t know’ responses, with only 7% of citizens not answering the question.

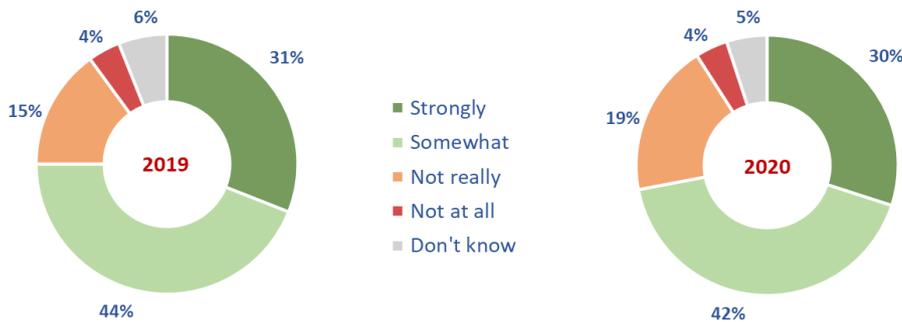
²¹ Respondents were asked to name and rank the three most important areas in which the EU should play a greater role.
²² More details are provided in Annex – Tables 8 and 9.
²³ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European Union is perceived by citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale (‘strongly’, ‘somewhat’, ‘not really’, ‘not at all’, or ‘don’t know’): ‘the EU fosters the preservation of traditional values in our society’, ‘the EU provides tangible benefits to citizens in their everyday lives’, ‘the EU is committed to fighting corruption’, ‘the EU is an independent actor in foreign relations’ and ‘integration with the EU increases the country’s security and stability’.

FIGURE 15 – ‘The EU is committed to fighting corruption’.
To what extent do you agree with this statement about the EU?
(Percentages refer to Ukrainians who have heard of the EU)



Three quarters of Ukrainians are also convinced that integration with the EU will increase the country’s security and stability (72%).²⁴ Again, this a very important finding considering that ‘peace, security and stability’ is considered the most important personal value by 73% of citizens.

FIGURE 16 – ‘Integration with the EU increases the country's security and stability’.
To what extent do you agree with this statement about the EU?
(Percentages refer to Ukrainians who have heard of the EU)



²⁴ The third wave saw the introduction of a new set of questions, targeted at gaining greater insights into how the European Union is perceived by citizens. Respondents were asked to rate their agreement with the following set of statements according to a five-grade scale (‘strongly’, ‘somewhat’, ‘not really’, ‘not at all’, or ‘don’t know’): ‘the EU fosters the preservation of traditional values in our society’, ‘the EU provides tangible benefits to citizens in their everyday lives’, ‘the EU is committed to fighting corruption’, ‘the EU is an independent actor in foreign relations’ and ‘integration with the EU increases the country's security and stability’.

3.3. Sources of information on the EU

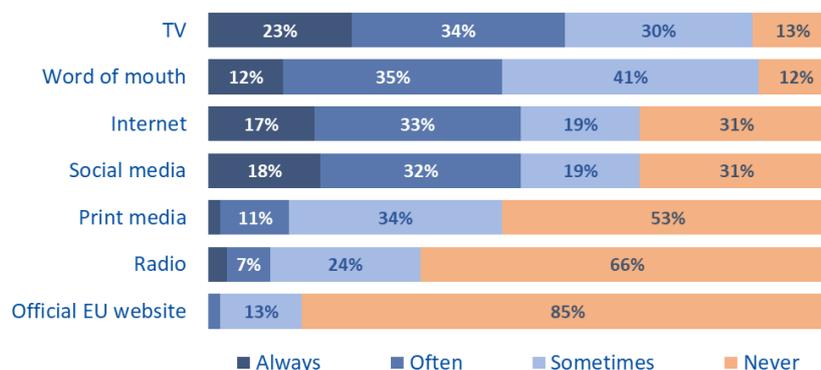
58% of Ukrainians claim to have seen or heard information about the EU in the last three months preceding the survey and a similar share of citizens access EU-related information frequently (13%) or sporadically (40%). EU-related information is increasingly circulated via digital media – a great share of passive exposure occurred via the Internet (40% of Ukrainians who have seen/heard information about the EU did it through this media, up 6%) and/or social media (38%, up 8%), likewise most ‘active searchers’ looked for information through the Internet (58%, up 12%) and/or social media (46%, up 13%). Around one in four citizens who look for information about the EU have used EU informational websites at least once (25%), with the EU Facebook page recording most visits. The quality of the information on the EU was rated positively by over 75% of ‘active searchers’ and, compared to 2019, they seem more interested in ‘general information’ (46%, up 8%) and ‘lifestyle in the EU’ (31%, up 7%) as well as ‘the relation between their country and the EU’ (36% up 5%) and ‘other EaP countries’ (12%, up 4%).

This section looks at the main sources of information in Ukraine, with a focus on specific information about the EU, its programmes and its institutional communication channels.

3.3.1. Media usage as sources of information

As in previous waves, television and ‘word of mouth’ continue to be the most popular sources of information in the country – only 13% and 12% of Ukrainians respectively ‘never’ rely on them. However, Ukrainians are increasingly turning to the Internet and social media regularly: half of citizens ‘always’ or ‘often’ use them versus 47% who rely on ‘word of mouth’ and around 10% who use ‘print press’ and/or the radio. Slightly less citizens accessed the official EU website, compared to 2019 (15%, down 5%), and only 2% ‘always’.

FIGURE 17 – Type of media used as a source of information (Q3.7)



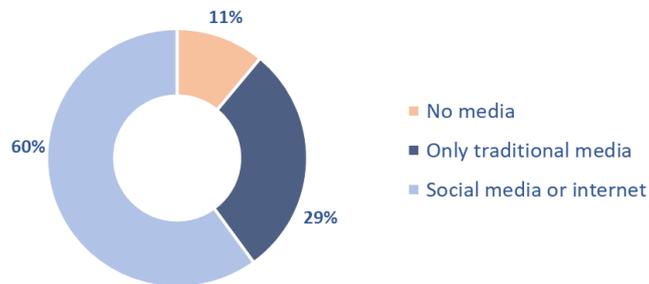
The breakdown of frequent users of traditional media only, new media and no media is shown in Figure 18²⁵. Compared to 2019, more citizens accessed the Internet or social media ‘frequently’ (60%, up 9%), and less used ‘traditional media only’ (29%, down 5%) or ‘no media’ at all (11%, down 4%).

Frequent usage of new media is more common among younger (85% for those aged 15-34 versus 69% for the middle age group and 28% for elderly), highly-educated (73% versus 51% for those with lower levels of education) and employed individuals (75% versus 57% for those who are unemployed). Males (64%) are also slightly more likely to rely frequently on new media than females (58%) – larger cities’

²⁵ The first group includes all individuals who ‘always’ or ‘often’ use only traditional media (such as television, radio and print media); the second group includes all individuals who ‘always’ or ‘often’ use either the Internet (including the official EU website) or social media; while the last group includes all individuals who do not ‘always’ or ‘often’ use any of the surveyed media.

residents (65%) compared to residents of small or medium-sized settlements (59% and 58% respectively). Conversely, the strongest users of traditional media only are the elderly (65%). As for language, native Russian speakers tend to have a slightly stronger preference for new media (65%) than native Ukrainians speakers (59%). Nearly one in five eastern residents do not rely on any media at all (17%)²⁶.

FIGURE 18 – Type of media frequently used as sources of information



The usage of national media in both Ukrainian and Russian is very common in the country: nearly all citizens use national media in Ukrainian – 21% ‘always’, 42% ‘often’ and 29% ‘sometimes’ – and over three quarters use national media in Russian – 15% ‘always’, 36% ‘often’ and 32% ‘sometimes’. The usage of foreign media in Russian (54%) is more limited – due to the restrictions over Russian TV channels and the decrease in popularity following the Donbas conflict²⁷. Less than one in five citizens rely on national and/or foreign media in other languages (18% and 15% respectively).

FIGURE 19 – Usage of media in Ukrainian, Russian and other languages (Q3.7)

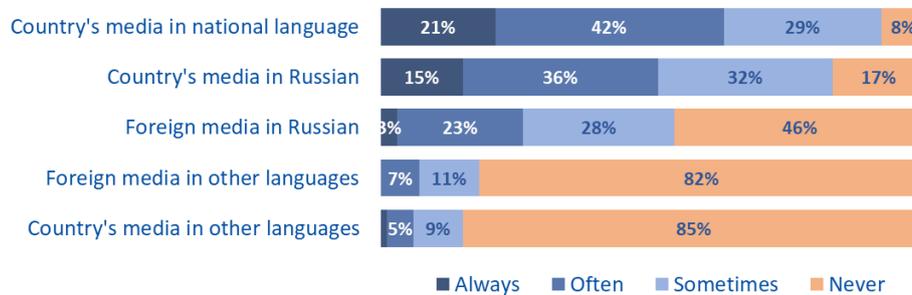


Figure 20 shows how frequently media in Ukrainian, Russian and other foreign languages are used, regardless of whether the media is national or foreign²⁸. Compared to 2019, frequent usage of both media in Ukrainian (63%, up 4%) and/or Russian (55%, up 7%) has increased, possibly due to the increasing popularity and reach of new media²⁹.

²⁶ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 10.

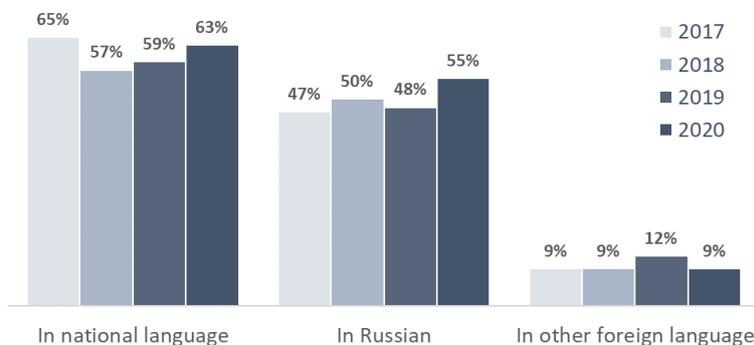
²⁷ Compared to other EaP countries, the role of Russian TV channels in Ukraine is more limited. Measures to restrict Russian channels were implemented after 2014 and a number of Russian TV channels were banned from cable. In addition, their popularity in the country has been undermined due to the armed conflicts in 2014. See: Monitoring of Russian channels by MEMO 98, Final report, 2015. *See source:* http://www.csdialogue.eu/sites/default/files/monitoring_report_executive_summary.pdf

²⁸ Frequent users of media in Ukrainian are defined as all individuals who ‘always’ or ‘often’ use media in the national language; those who ‘always’ or ‘often’ use the country’s or foreign media in Russian are seen as frequent users of media in Russian. Finally, frequent users of media in foreign languages are those who ‘always’ or ‘often’ use the country’s or foreign media in other languages. The frequent use of media in one language is not exclusive, in the sense that individuals might also access media in other languages.

²⁹ According to 2019 Internews Media Consumption Survey, Ukrainians increasingly turn to the Internet as their major source of news and information, with online and social media taking over from television for the first time in popularity and reach. The poll revealed that since 2015 the share of Ukrainian internet users has risen by 14% and 85% of Ukrainians are now online. (*Source:* <https://internews.in.ua/news/online-and-social-media-overtake-tv-in-popularity-in-ukraine-a-new-usaid-internews-media-consumption-survey-says/>).

In general, citizens tend to rely on media in their respective mother tongues – 71% of native Ukrainian speakers use media in Ukrainian and 70% of native Russian speakers rely on media in Russian – however native Russian speakers are also keen users of media in other foreign languages (19%), whereas very few native Ukrainian speakers rely on them (5%). Residents of larger cities are the most likely to access media in various languages – Ukrainian (64%), Russian (64%) and other foreign languages (10%)³⁰.

FIGURE 20 – Frequent usage of media in Ukrainian, Russian and other languages



Ukraine’s media environment is characterised by relatively low levels of trust as well as popularity. In fact, the most trusted source of information is ‘word of mouth’ (70%) and the majority of citizens are confident only towards national media in Ukrainian (60%), Internet (56%) and social media (51%). Russian media – especially if foreign-owned – are considered either biased (43% and 39% of citizens tend not to trust, respectively) or unratable (14% and 27% respectively), just like the TV (42% and 11% respectively)³¹. As for media in other foreign languages, traditional media (print press and radio) and the official EU websites, their popularity and reach is so low that between 36% and 52% of the population did not provide a definite opinion³². It is worth noting that, in general, ratings are better than in 2019 – a finding that may indicate a decrease in disinformation, after the peak reached before the 2019 elections, together with an increase in the share of citizens who feel confident in identifying impartial sources available to them possibly online.

3.3.2. Sources of information about the EU

Almost 60% of Ukrainians claim to have seen or heard information about the EU in the last three months (58%), with no change compared to 2019. Western residents (71%) are the most likely to have been exposed to EU-related information – with a gap of 15 percentage points compared to residents of the centre (56%) and a gap of 26 percentage points compared to eastern residents (45%). Males (60%) and highly-educated citizens (61%) have also been slightly more exposed to information than women (56%) and lowly-educated citizens (55%). An even smaller difference was observed between native Ukrainian (58%) and Russian (55%) speakers³³.

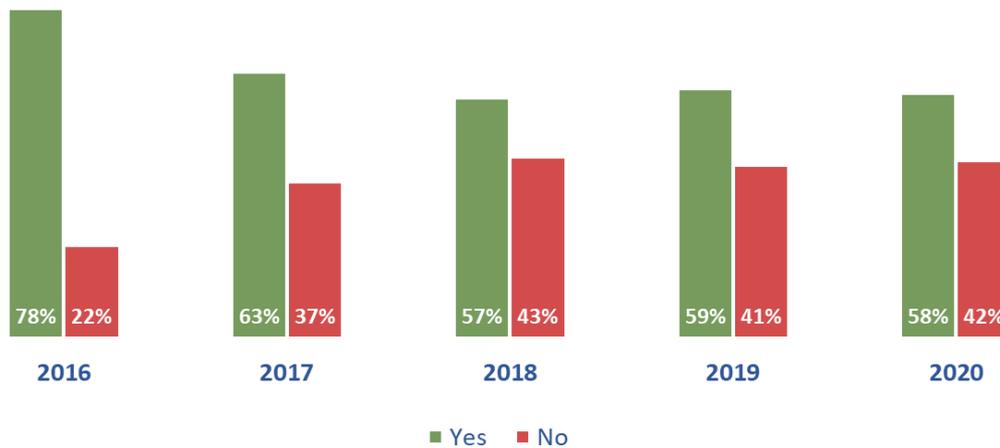
³⁰ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 11.

³¹ According to a poll conducted before the 2019 elections by the International Republican Institute’s (IRI) Centre for Insights in Survey Research, Ukrainians rated Russian media as the most biased sources of information and also indicated a general distrust of all media platforms. General skepticism may be associated with the country being on the frontlines of the Kremlin’s disinformation campaign for years. (Source: <https://www.iri.org/resource/ukraine-poll-political-disaffection-rife-among-young-people-ahead-2019-elections>).

³² More details are provided in Annex – Table 12.

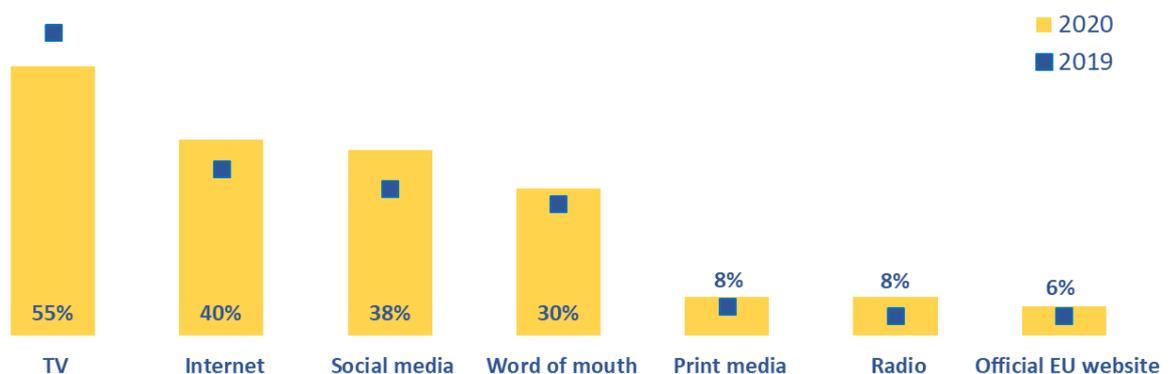
³³ More details on exposure to information about the EU and socio-demographic characteristics are provided in Annex – Table 13.

FIGURE 21 – Have you seen or heard any information about the EU in the last three months? (Q3.2)
(Percentages refer to Ukrainians who have heard of the EU)



EU-related information is increasingly disseminated by digital media, through the Internet (40% of Ukrainians who have seen/heard information about the EU did it through this media, up 6%) and social media (38%, up 8%). ‘Passive’ exposure to other media sources have remained mainly stable – except for that linked to the TV which continues to show a decreasing trend (55%, down 7% since 2019 and down 19% since 2018). Less than one in ten citizens passively exposed to EU information mentioned the official EU website (6%, down 2%).

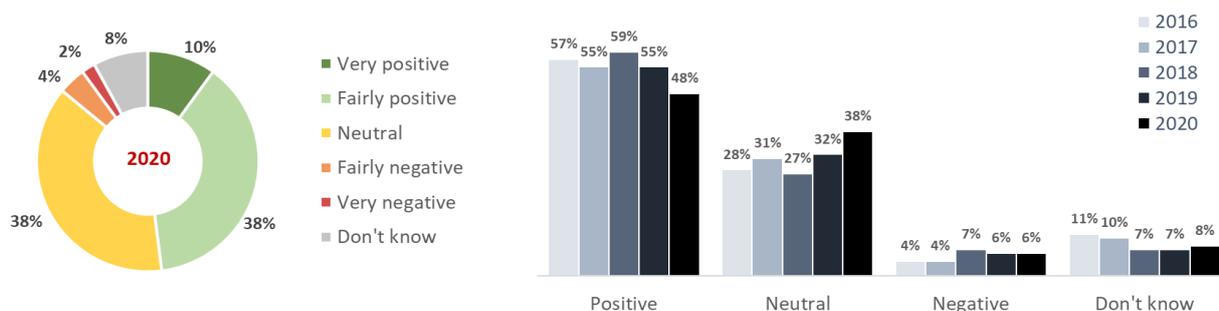
FIGURE 22 – Where or from whom have you seen or heard information about the EU in the last three months? (Q3.2.1, multiple answers possible)
(Percentages refer to Ukrainians who have heard any information about the EU in the last three months)



Among those who had heard about the EU, 48% felt that national media presented the EU positively (10% ‘very positively’, 38% ‘fairly positively’), with a decrease when compared to 2019 (down 7%). Native Ukrainian speakers (50%), western residents (54%) and younger citizens (52%) – who tend to share a more positive attitude towards the EU and, in some cases, also greater levels of passive exposure – generally give a more positive evaluation than their socio-demographic counterparts³⁴.

³⁴ For the distribution according to the main socio-demographic characteristics, see Table 14 in Annex.

FIGURE 23 – 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)

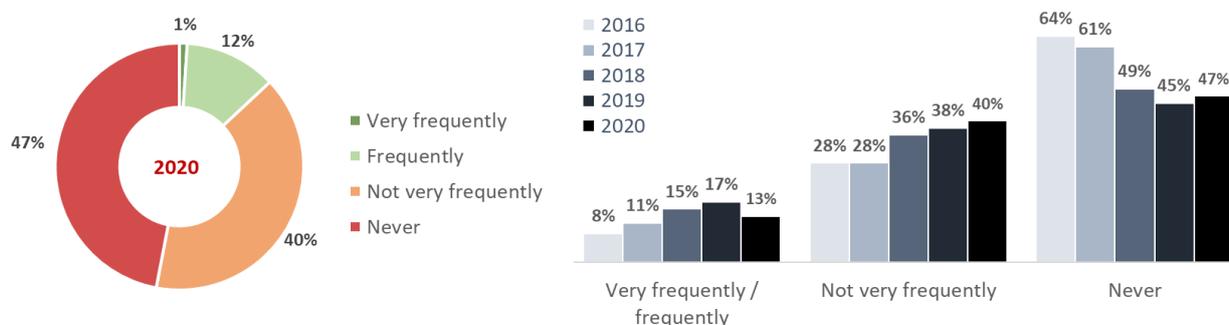


According to 60% of the population, the information which they read, watched or accessed online helps them to have a better understanding of the EU, either ‘fairly’ (49%) or ‘very much’ (11%).

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

Compared to 2019, frequent access to information on the EU has seen a slight decrease (from 17% to 13%) while sporadic access has kept more in line with the slightly increasing historical trend (40%, up 2%). The most ‘active searchers’ groups are employed (22% of them frequently looks for EU-related information) and highly-educated citizens (19%). Native Russian speakers also tend to be more ‘active searchers’ – only 32% ‘never’ search for information versus 51% for native Ukrainian speakers. As in 2019, the highest share of people who never look for information on the EU can be found in the west of the country, 66% of citizens never search for EU-related information³⁵.

FIGURE 24 – How often do you look for/access information on the EU? (Q3.1)
(Percentages refer to Ukrainians who have heard of the EU)

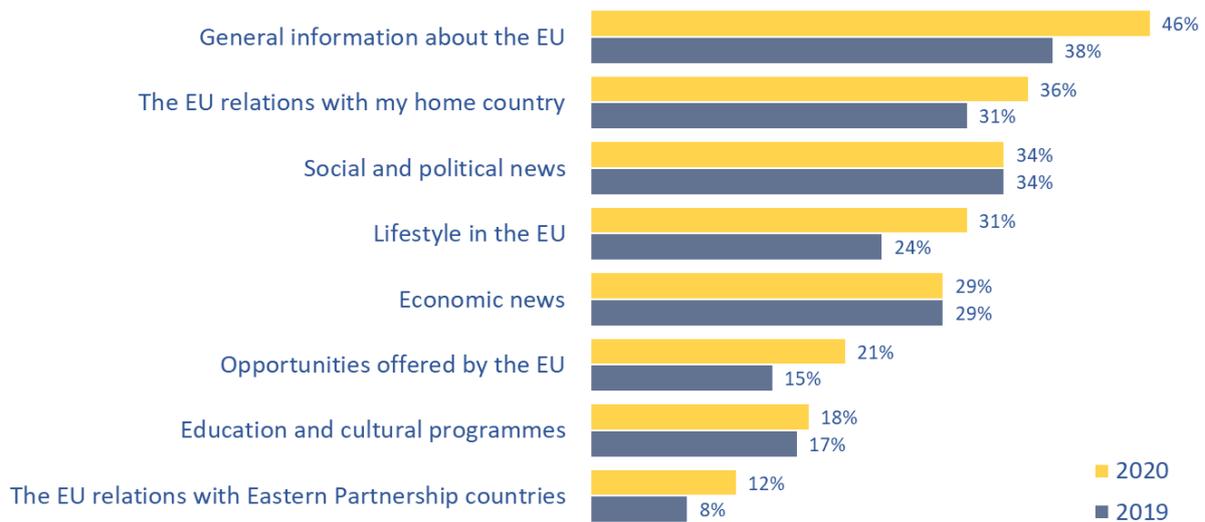


Almost 60% of Ukrainians who search for information about the EU do it in Russian (57%) versus 42% who do so in their national language. Only a tiny minority use English (1%).

Compared to 2019, ‘active searchers’ seem more interested in ‘general information’ (46%, up 8%) and ‘lifestyle in the EU’ (31%, up 7%) as well as ‘the relation between their country and the EU’ (36% up 5%) and ‘other EaP countries’ (12%, up 4%). ‘Opportunities offered by the EU’ (21%, up 6%) and ‘education and cultural programmes’ (18%, up 1%) also provoked more interest than in previous waves.

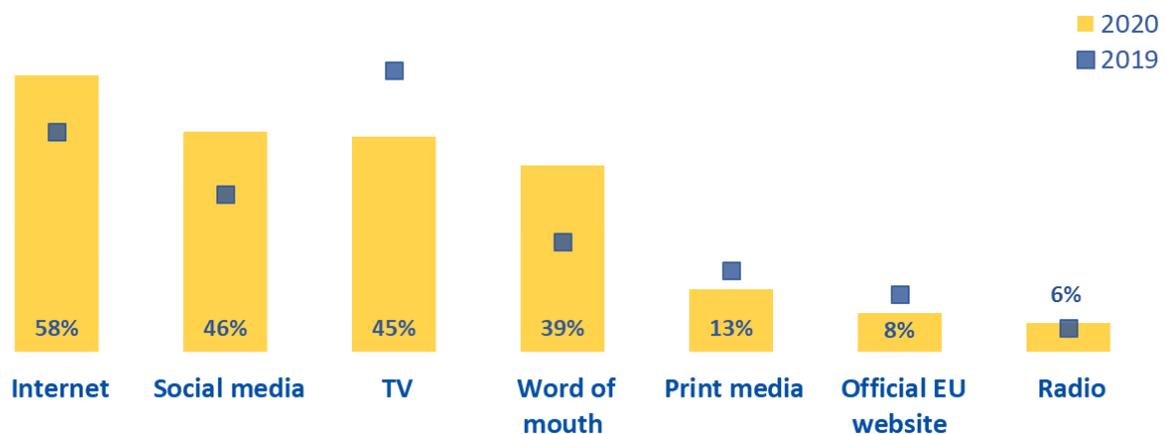
³⁵ More details on the distribution according to the main socio-demographic characteristics are provided in Annex – Table 15.

FIGURE 25 – 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)



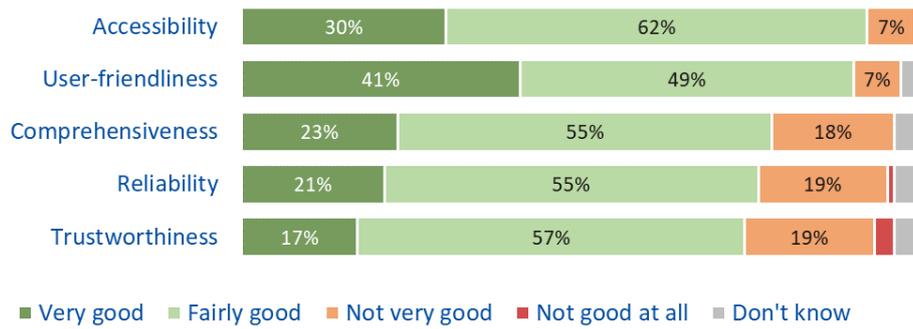
EU-related information is increasingly targeted through new media – the Internet (58% of Ukrainians who look for information about the EU do it through this media, up 12%) and social media (46%, up 13%) – or else circulating by ‘word of mouth’ (39%, up 16%). By contrast, ‘active’ exposure linked to TV usage has largely declined (45%, down 14%). Roughly one in ten ‘active searchers’ accessed the official EU website while searching for information (8%, down 4% since 2019).

FIGURE 26 – 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)



As in previous waves, the assessment of the quality of EU-related information is very positive. **Around three quarters or more of ‘active searchers’ provided a ‘very’ or ‘fairly positive’ rating in terms of all assessed items:** more specifically 92% find it ‘accessible’, 90% ‘user-friendly’, 78% ‘comprehensive’, 76% ‘reliable’, and 74% ‘trustworthy’.

FIGURE 27 – 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)



A quarter of Ukrainians have used EU informational websites³⁶ at least once (25%), just like in 2019. The EU Facebook page is the most accessed (19% of ‘active serachers’), followed by the EU institution website (8%), the EU Twitter pages (8%), the EU projects’ website (6%) and the EU Delegation website (4%).

³⁶ This refers to EU institutions’ websites; the EU Delegation website; EU projects’ websites; the ‘EU NEIGHBOURS’ website; and EU Twitter and EU Facebook pages.

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

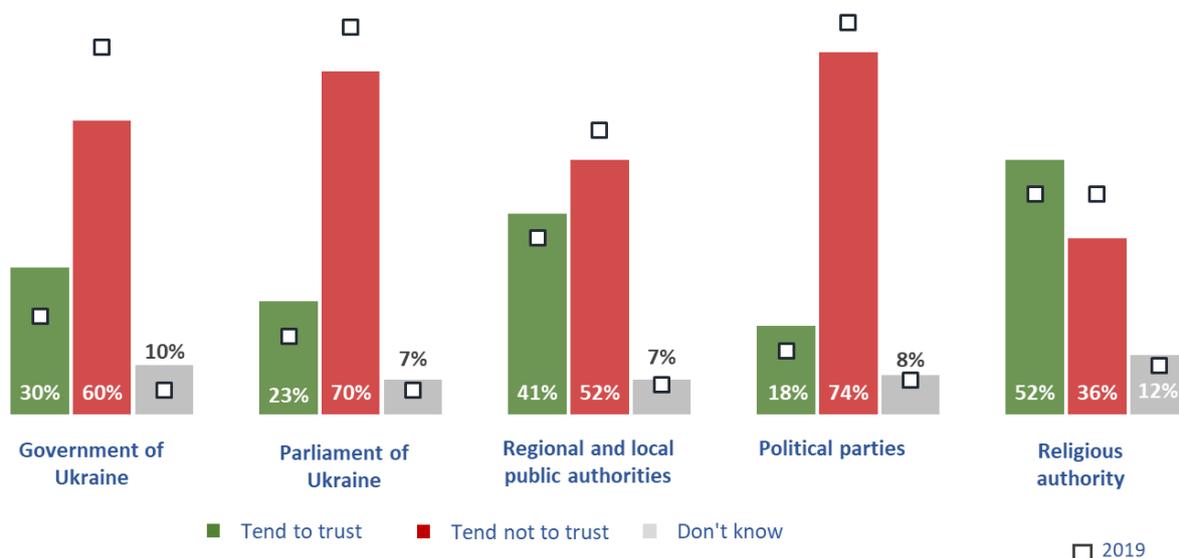
*Citizens appear more positive after the outcome of 2019 elections and a decline in distrust towards the country’s institutions was observed – despite Ukrainians continuing to display very low levels of confidence. **The most trusted institution** – aside from the religious authority (52%) – **are regional and local public institutions** (41%, up 5%), followed by the Government (30%, up 10%) and the Parliament (23%, up 7%). Only 18% of citizens trust political parties. **The assessment of the values that Ukrainians believe to apply to their country is also slightly more positive than last year.** Around half of citizens are convinced that ‘gender equality’, ‘freedom of speech’, ‘free and fair elections’ and ‘freedom of the media’ are guaranteed in Ukraine – in 2019 only ‘gender equality’ exceeded the 50% threshold and ‘free and fair elections’ stood at 24%. **However, most Ukrainians continue to be ‘not optimistic’ towards the future of their country** (55%), with 49% of them worried about ‘low living standards and poverty’ (46% in 2019) and 37% about ‘security and war’ (39% in 2019) – their two primary concerns.*

This section presents an assessment of Ukraine’s current and future situation, with regard to the current functioning of democracy and the most pressing problems.

3.4.1. View of Ukraine’s current situation

Citizens appear more positive after the outcome of 2019 elections and a decline in distrust towards the country’s institutions was observed – despite Ukrainians continuing to display very low levels of confidence compared to other EaP countries, and the world in general³⁷. The most trusted institution – aside from the religious authority (52%) – are regional and local public institutions (41%, up 5%), followed by the Government (30%, up 10%) and the Parliament (23%, up 7%). Only 18% of citizens trust political parties – although a small increase in trust was also observed in this case (up 5%).

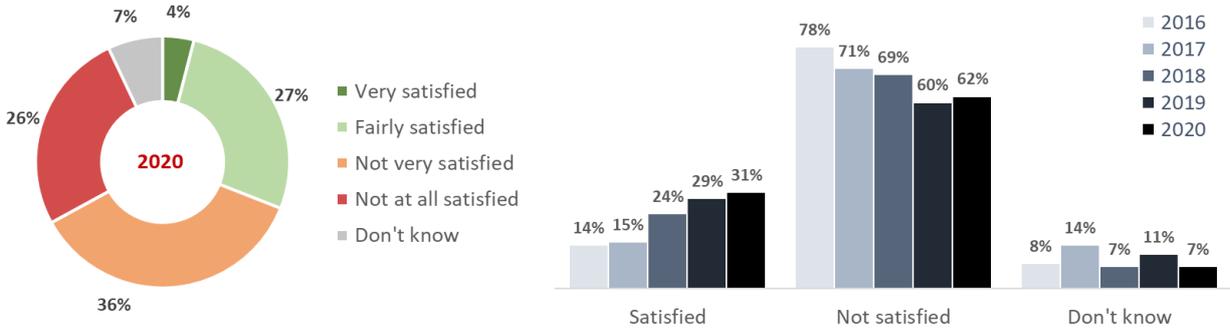
FIGURE 28 – Please tell us your level of trust in the following institutions (Q4.1)



³⁷ According to a recent poll conducted by Gallup, confidence in the national government was even lower in 2018 and stood at 9%: it was the lowest confidence level in the world for the second straight year. This was far below the regional median for former Soviet states (48%) as well as the global average (56%) in 2018. (See: <https://news.gallup.com/poll/247976/world-low-ukrainians-confident-government.aspx>.) It is also worth noting that, according to the International Republican Institute’s (IRI) Center for Insights in Survey Research, Ukraine’s young people are the most politically disengaged age group, which is troubling considering that they are very much in favor of membership with the European Union. (See <https://www.iri.org/resource/new-ukraine-poll-reveals-high-hopes-ahead-snap-parliamentary-elections>).

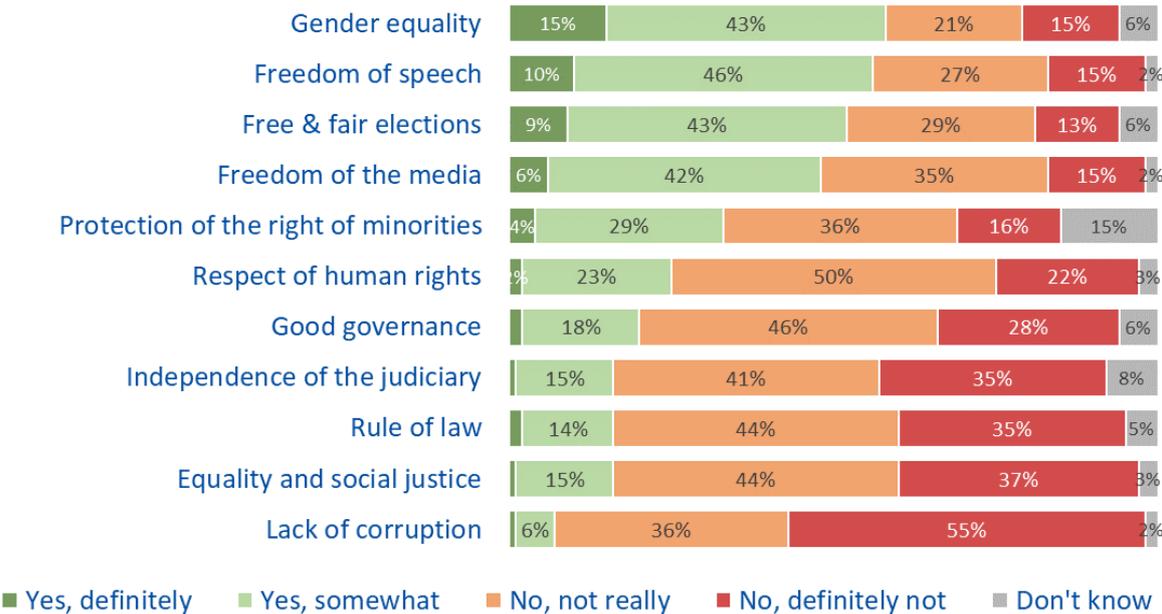
Accordingly, only 31% of Ukrainians are satisfied with the way democracy works in their country – nevertheless the trend is increasing (up 2% since 2019 and up 17% since 2016). Levels of contentment are particularly low for native Russian speakers (24% versus 33% for native Ukrainian speakers) and in the east of the country (27% versus 31% in the west and 34% in the centre). Younger citizens are generally much more satisfied (42%) than middle-aged (27%) or older individuals (25%)³⁸.

FIGURE 29 – 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 assessment of the values that Ukrainians believe to apply to their country is also slightly more positive than last year. Around half of citizens are convinced that ‘gender equality’ (58%), ‘freedom of speech’ (56%), ‘free and fair elections’ (52%) and ‘freedom of the media’ (48%) apply in Ukraine – in 2019 only ‘gender equality’ exceeded the 50% threshold and ‘free and fair elections’ stood at 24%. **However, ‘independence of the judiciary’, ‘rule of law’, ‘good governance’ and ‘lack of corruption’ were still assessed as very problematic – between 35% and 55% of citizens stated that they ‘definitely do not apply’ to their country.**

FIGURE 30 – To what extent do you think that the following elements apply in Ukraine? (Q4.4)



³⁸ More details on satisfaction with democracy and socio-demographic characteristics are provided in Annex – Table 16.

3.4.2. Future expectations

Most Ukrainians continue to be ‘not optimistic’ towards the future of their country (55%), with no significant change compared to 2019 (up 3%). Future personal prospects are more positive and 58% of citizens are ‘optimistic’ (up 4% since 2018 and up 16% since 2016). Younger individuals are more positive about their personal future (79%) as well as the future of their country (54%) than middle-aged (61% and 38% respectively) and older citizens (34% and 36% respectively) – and the same holds true for native Ukrainian speakers (60% and 47%) versus native Russian speakers (51% and 31%)³⁹.

FIGURE 31 – How optimistic are you about the future of your country? (Q4.5)

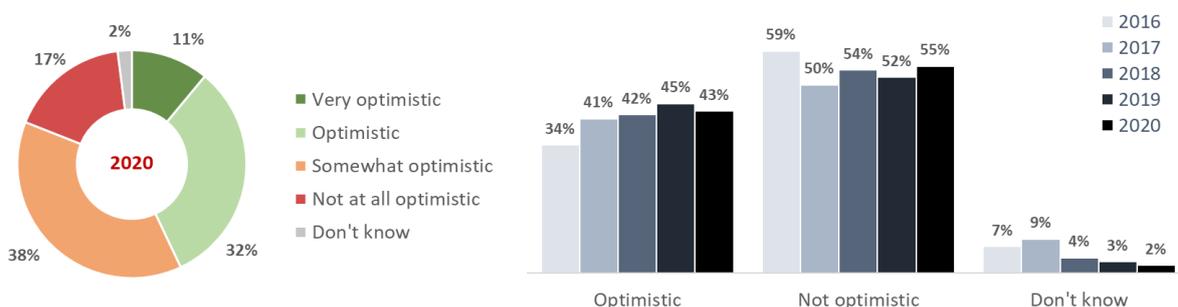
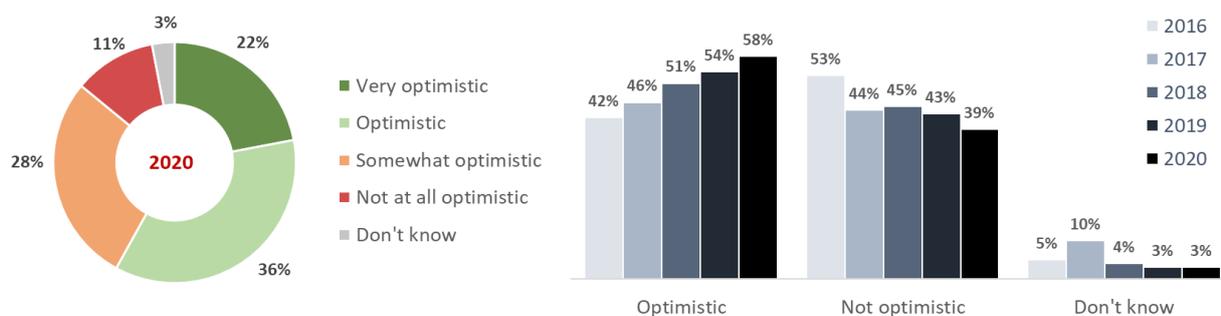


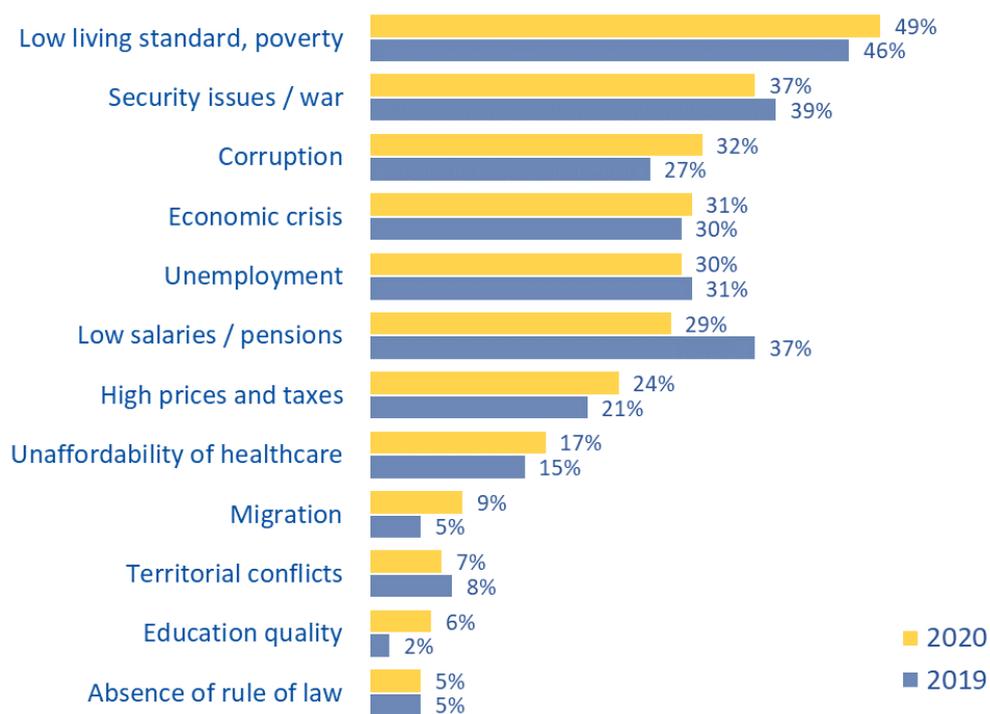
FIGURE 32 – How optimistic are you about your personal future? (Q4.6)



The survey indicates that Ukrainians’ concerns remain stable over time: 49% are worried about ‘low living standards and poverty’ (46% in 2019) and 37% about ‘security and war’ (39% in 2019) – their two primary concerns. Around one third of citizens would also like to see an improvement with regard to ‘the fight against corruption’ (32%), ‘economic crisis’ (31%), ‘unemployment’ (30%) and ‘salaries and pensions’ (29%).

³⁹ More details on optimism regarding citizens’ personal future and the country’s future and socio-demographic characteristics are provided in Annex – Tables 17 and 18.

**FIGURE 33– What do you consider to be the most pressing problems facing your country?
(Q4.2, multiple answers possible)**



3.5. Profiling attitudes towards the EU: positive versus neutral

Holders of a positive view of the EU represent the majority of Ukrainians – 51% of the total population (down 5% since 2019) – while Ukrainians with a ‘neutral’ view of the EU account for roughly one third of the population (35%, up 6% compared to 2019). EU supporters tend to be more concentrated among the younger generations (38%), most-educated citizens (52%), Ukrainian speakers (82%) and residents of the west of the country (41%). By contrast, ‘neutral’ citizens are more likely to be middle-aged (41%), have a lower level of education (58%), live in smaller settlements (54%), be native Russian speakers (26%) and be settled in the east of the country (36%). ‘Neutral’ citizens display lower levels of both ‘passive’ (44% versus 71% for EU supporters) and ‘active’ exposure to EU-related information (50% versus 63%), both of which impact on their acknowledgement of the EU’s role and its financial support. Only 51% of neutrally oriented people trust the EU (versus 91% for EU supporters); 51% know that the EU financially supports Ukraine (versus 75%) and 30% of aware citizens consider its support ‘effective’ (versus 59%). ‘Neutral’ individuals are also more pessimistic regarding their country’s future (63% versus 40% for EU supporters) and particularly concerned about the current economic situation and all related issues, such ‘low living standards and poverty’ (45%), ‘unemployment’ (33%), ‘low salaries and pensions’ (32%), ‘high prices and taxes’ (26%).

In this section, the attitude of Ukrainians towards the EU has been analysed according to two main profiles: individuals who have a positive image of the EU and those who are neutral towards it.⁴⁰

Attitudes were profiled against a comprehensive set of indicators, starting with the main socio-demographic characteristics, followed by passive and active exposure to EU-related information (including main language used and subjects of interest), assessment of the relationship between Ukraine and the EU, awareness and effectiveness of its financial support and level of trust towards the EU and other foreign institutions, and finally the perception of the country’s and respondents’ personal future and main concerns.

3.5.1. Positive attitudes

Holders of a positive view of the EU represent the majority of Ukrainians – 51% of the total population (down 5% since 2019) – and, as such, they can be easily found in all socio-demographic groups. Compared to the general population, however, EU supporters tend to be more concentrated among the younger generations (38% versus 33% for the general population), most educated citizens (52% versus 46%), Ukrainian speakers (82% versus 77%) and residents of west of the country (41% versus 34%)⁴¹.

⁴⁰ Individuals that were mostly negatively oriented were excluded from the comparison, as their number was too small for the results to be statistically significant.

⁴¹ According to a 2019 research on the EU integration processes across Ukraine conducted by the New Europe Center, the western region of Lviv was identified as Ukraine’s current Euro-integration leader. This result is in line with traditional perceptions of Lviv region as the most typically European part of Ukraine and reflects its favorable location on the EU border. Country’s top ten also featured the western region of Vinnytsia. (See: <https://www.atlanticcouncil.org/blogs/ukrainealert/european-integration-is-taking-root-across-ukraine-despite-russias-best-efforts/>).

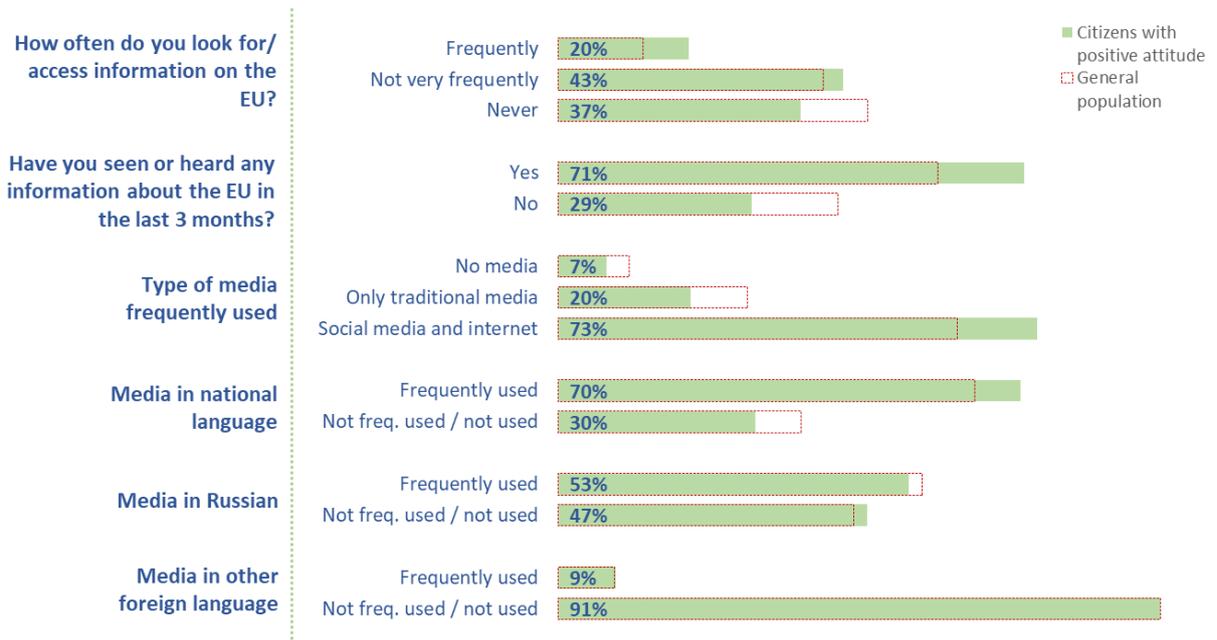
FIGURE 34 – Socio-demographic characteristics and geographical location of Ukrainians with a positive image of the EU



EU supporters are more likely to have been ‘passively’ exposed to information about the EU: 71% of them have seen or heard information about the EU in the three months preceding the survey (versus 58% in the general population). Higher rates of ‘active’ engagement are also observed among them: 63% of them look for/access information on the EU ‘frequently’ (20%) or ‘sporadically’ (43%) – versus 13% and 40% respectively among the general population. They are more keen users of new media – 73% ‘frequently’ use the Internet and social media – and media in national language (70%) than the general population (60% and 63% respectively).

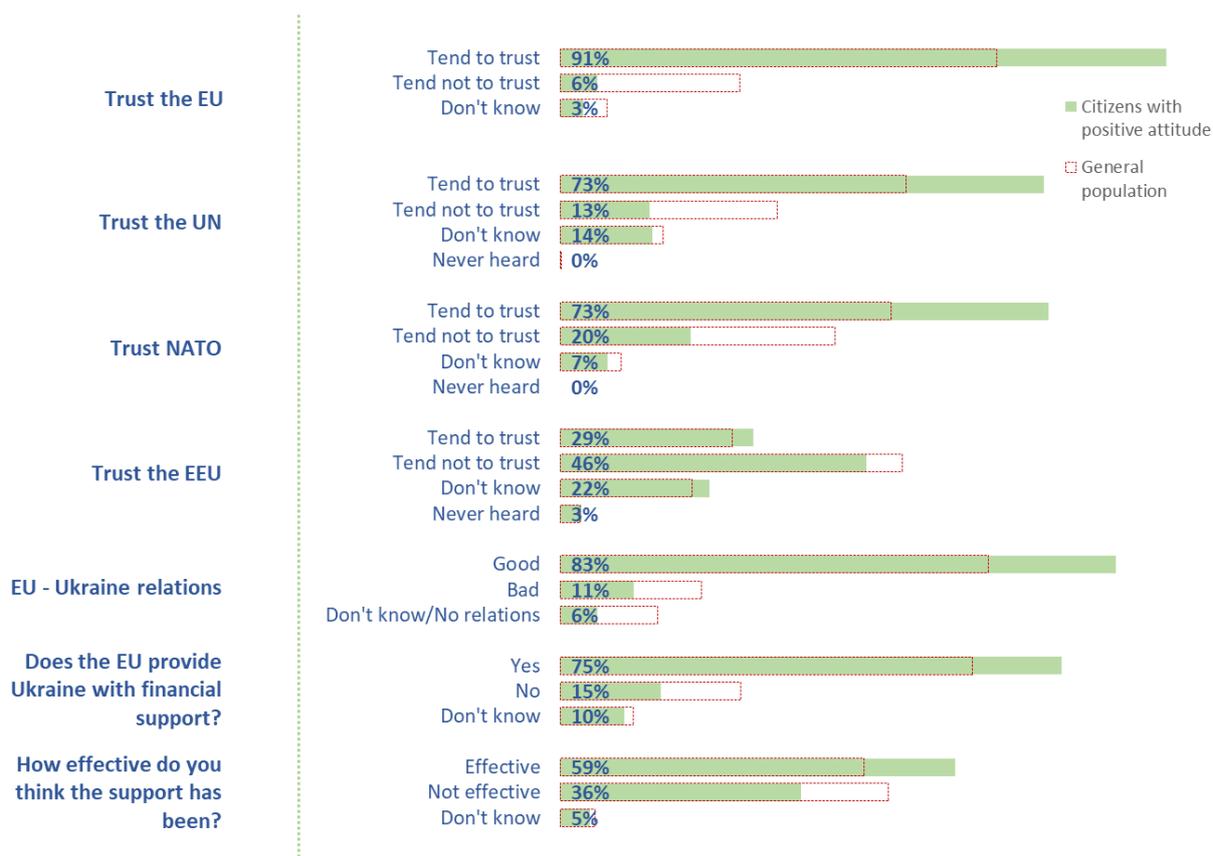
If searching for EU-related information, EU supporters are more likely to look for ‘lifestyle in the EU’ (37% versus 31%) as well as ‘the ‘EU relations with Ukraine’ (41% versus 36%) and ‘other EaP countries’ (14% versus 12%). A greater interest was also observed in ‘opportunities offered by the EU’ (26% versus 21%) and ‘education and cultural programmes’ (21% versus 18%) – which may be linked to the fact that they are, on average, a ‘younger’ population.

FIGURE 35 – Exposure to information about the EU and media usage among Ukrainians with a positive image of the EU



The greater exposure to EU-related information has a positive impact on acknowledgement of the EU role: 91% of EU-supporters trust the EU and 83% of them have a positive image of the relations between it and their country (versus 66% and 64% respectively in the general population). Three quarters know that the EU financially supports Ukraine (versus 62%) and 59% of them consider its support as ‘effective’ (versus 46%). It is also worth noting that trust towards the United Nations and the NATO is also high (73% versus around 50% in the general population) and growing (it was around 60% in 2019). By contrast, only 29% trust the EAEU (versus 26%).

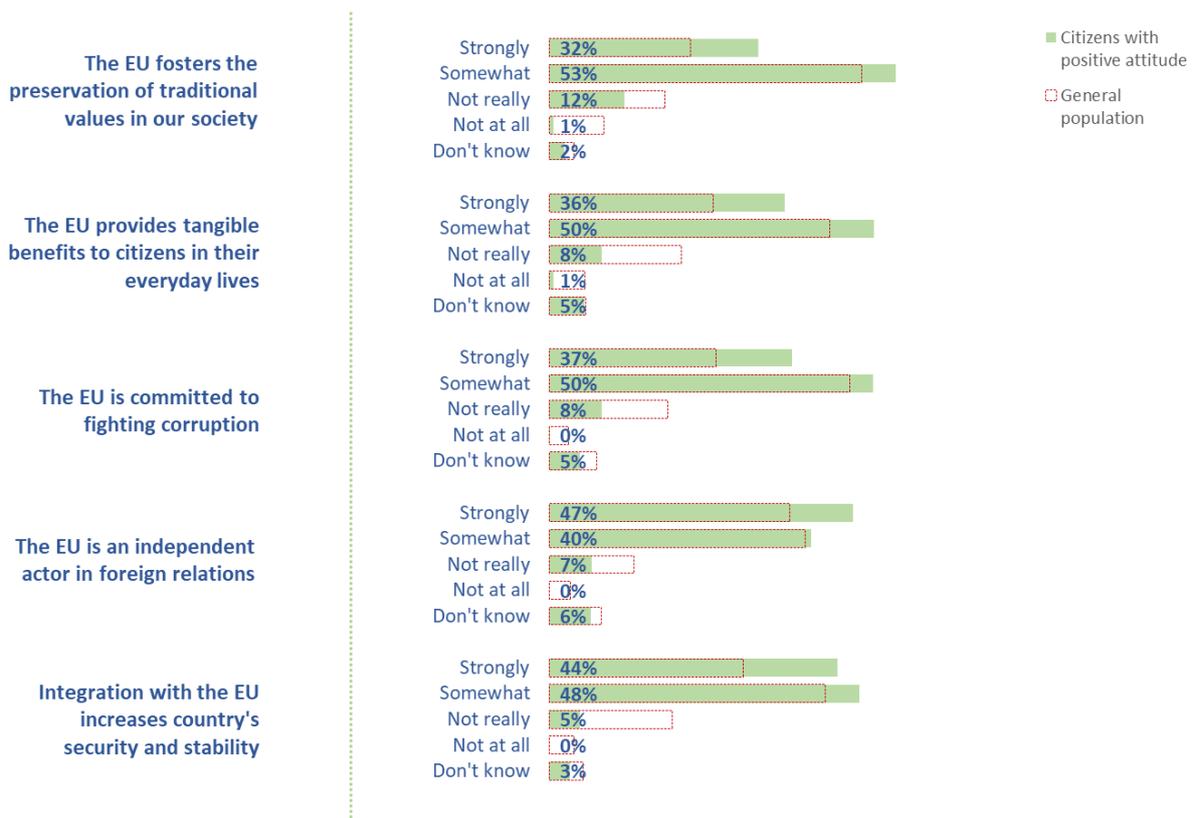
FIGURE 36 – Attitudes towards the EU among Ukrainians with a positive image of the EU



Over 85% of EU supporters ‘strongly’ or ‘somewhat’ agree with all five statements on common beliefs regarding the EU – reaching a peak of 92% when it comes to the rating of the effects of closer integration with the EU on the country’s ‘security and stability’ – the respective figures for the general population are between 68% and 72%. As previously noted, Ukraine has strengthened the depth of political dialogue with the EU, and acknowledges its support for the territorial integrity of the country⁴².

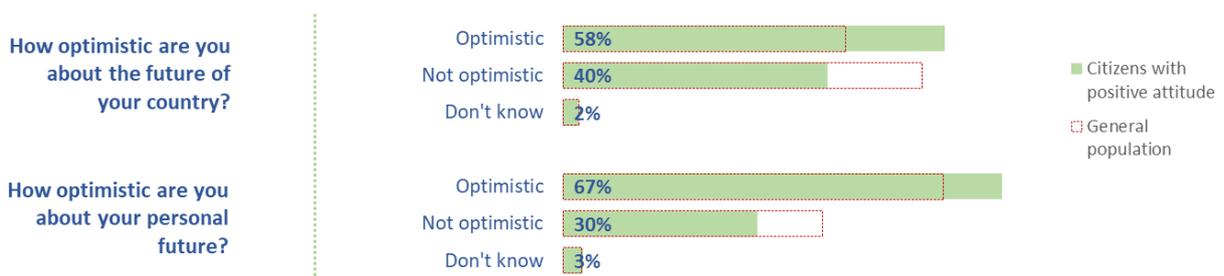
⁴² On October 2018, the European Parliament adopted a resolution, in which it condemned Russia’s militarisation of the Azov and Black Seas. The European Parliament also proposed the appointment of a Special EU Representative for Crimea and Donbass, whose mandate would extend to the Azov Sea. See: Joint Motion for a Resolution on the Situation in the Sea of Azov (2018/2870(RSP)), European Parliament, 24 October 2018 and also Eastern Partnership Index 2017, Charting Progress in European Integration, Democratic Reforms, and Sustainable Development Eastern Partnership Civil Society Forum, 2018, <https://eap-csf.eu/eastern-partnership-index/>

FIGURE 37 – Common beliefs of Ukrainians with a positive image of the EU



EU supporters are more positive than the general population with regard to their personal future (67% portrayed themselves as 'optimistic' versus 58%) and their country's future (58% versus 43%). In general they share the same concerns as the general population – their greatest concerns are 'low living standards and poverty' (50%) – although they seem only slightly more worried about 'corruption', 'security issues and war' and 'migration' (1 to 3 percentage points).

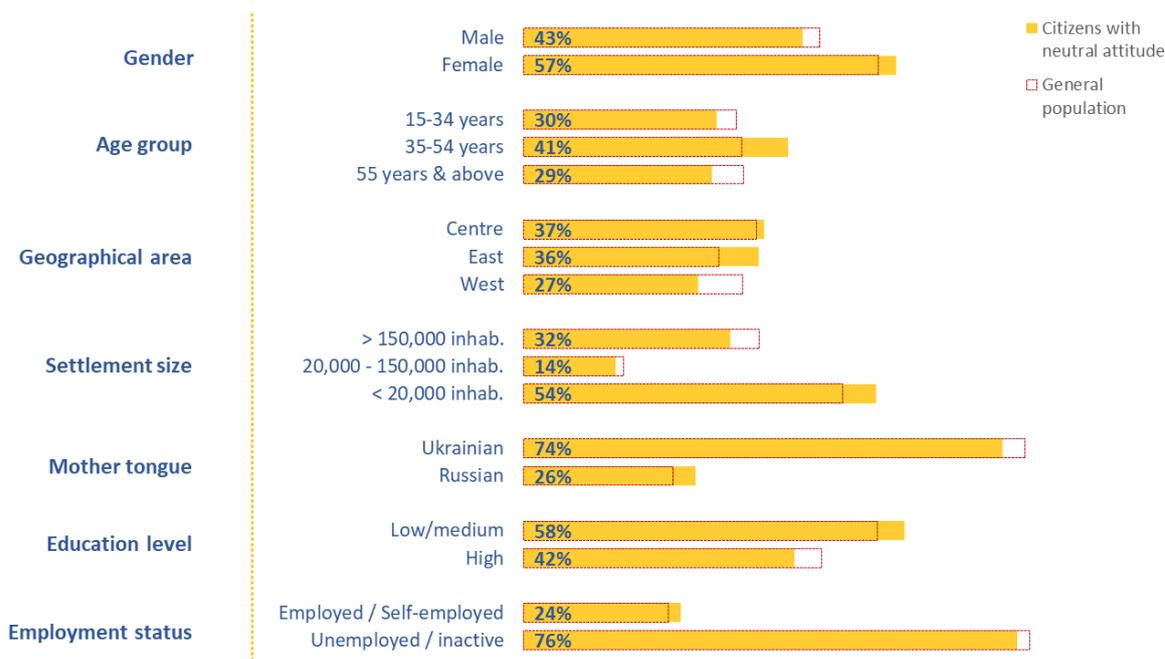
FIGURE 38 – View of the future among Ukrainians with a positive image of the EU



3.5.2. Neutral attitudes

Ukrainians with a neutral view of the EU account roughly for one third of the population (35%, up 6% compared to 2019). Compared to EU supporters, they are more likely to be middle-aged (41% versus 30%), have a lower level of education (58% versus 48%) and live in smaller settlements (54% versus 50%). In addition, 26% are native Russian speakers (18% among EU supporters); accordingly they are more likely to be settled in the east of the country (36% versus 24%), where there is a higher concentration of ethnic Russian and native Russian speakers.

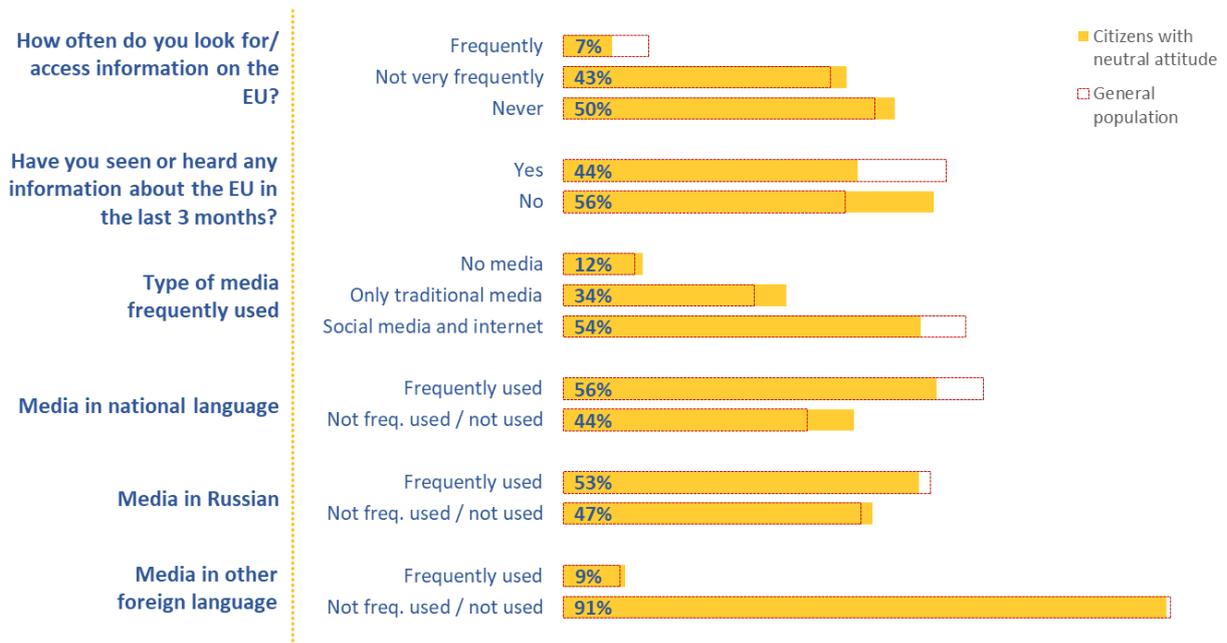
FIGURE 39 – Socio-demographic characteristics and geographical location of Ukrainians with a neutral image of the EU



Half or more ‘neutral’ citizens have not heard any information about the EU in the three months preceding the survey (56%), nor have they searched for it (50%) – 29% and 37% respectively for ‘passive’ and ‘active’ exposure of EU supporters. ‘Neutral’ citizens tend also to rely more on traditional media (34%) and less on new media (54%) compared to holders of a positive view of the EU (20% and 73% respectively).

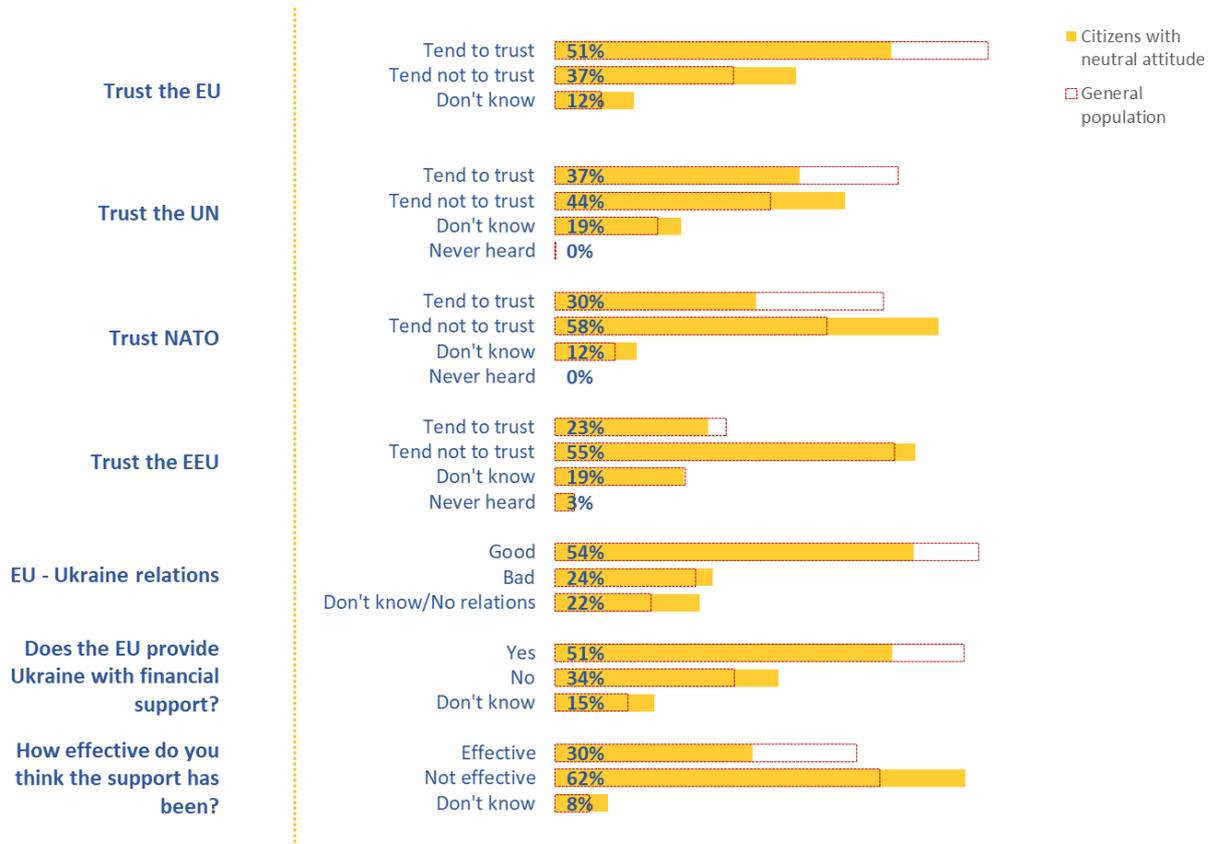
If actively searching, most ‘neutral’ citizens ‘frequently’ use Russian (61% versus 52%) – although they are not more keen users of Russian media (53% just like EU supporters). Compared to EU supporters ‘they are more interested only in ‘general information about the EU’ (51% versus 43%) and/or ‘socio-political news’ (38% versus 35%). However, compared to 2019, they seem more interested in the ‘relations between their country and the EU’ (29%, up 11%) and/or ‘other EaP countries’ (10%, up 8%).

FIGURE 40 – Exposure to information about the EU and media usage among Ukrainians with a neutral image of the EU



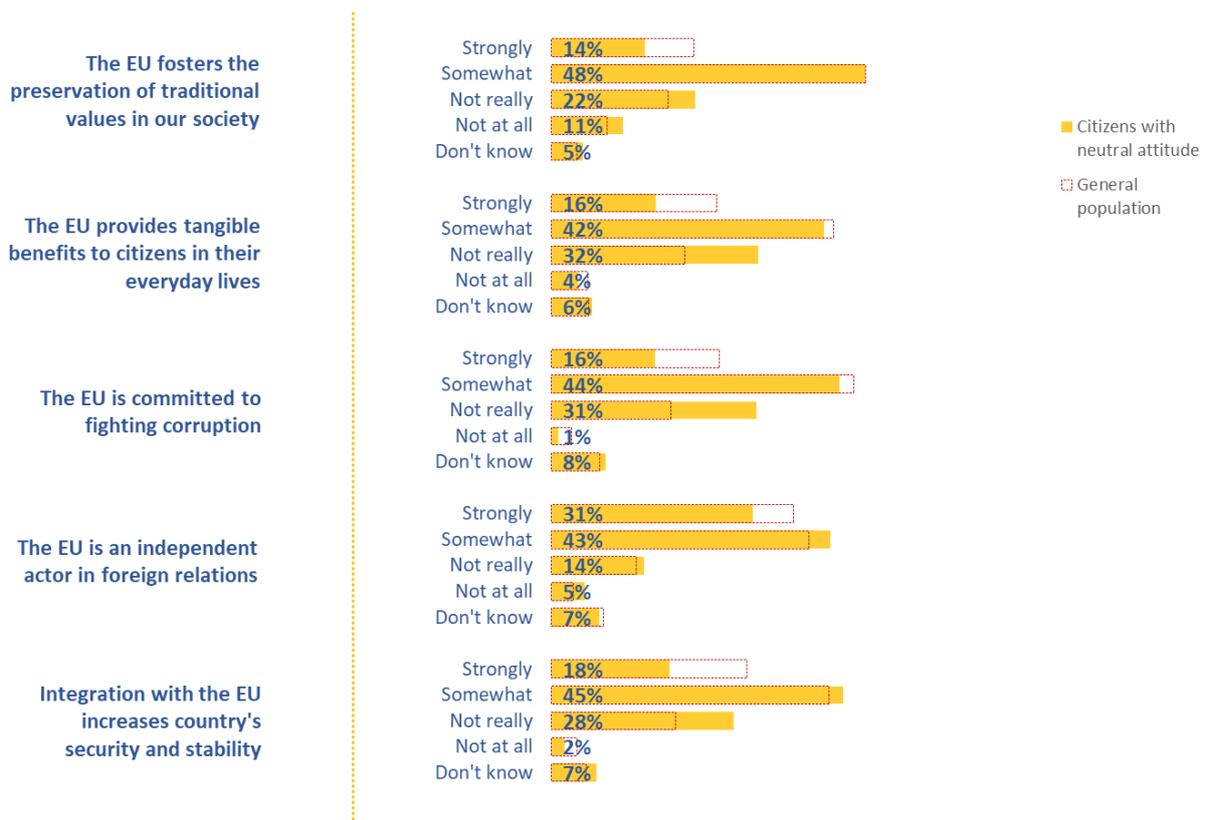
‘Neutral’ citizens tend to be less informed about the role of foreign institutions – around one in five citizens could not rate its level of trust in the UN and the EEAU – and were more careful in evaluating the nature of the relationship with their country. Only the EU is trusted by the majority of the population (51% versus 91% for EU-positively oriented Ukrainians), whereas trust in the NATO stands at 30% (versus 73%). Half of neutrally oriented citizens acknowledge the EU’s financial support (51%), but only 30% of citizens who are aware of it consider it effective (75% and 59% respectively for EU supporters).

FIGURE 41 – Attitudes towards the EU among Ukrainians with a neutral image of the EU



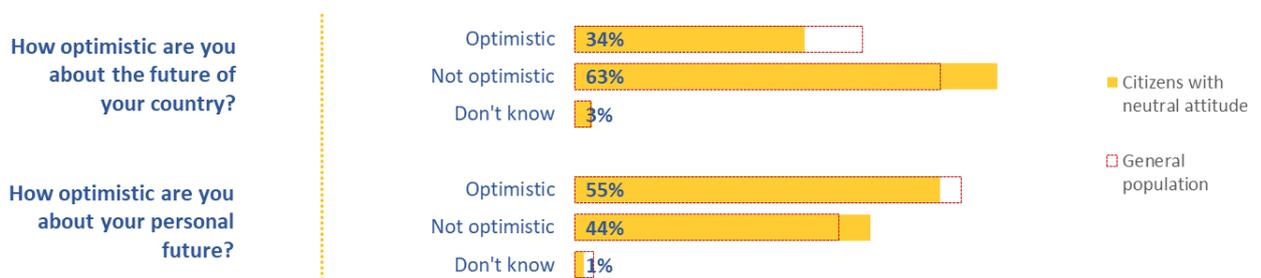
When it comes to common beliefs, individuals holding a neutral image of the EU are again less positive than EU supporters. The highest rate of approval was recorded for the statement that ‘the EU is an independent actor in foreign relations’ (74%, up 9% since 2019); at the opposite end 58% of ‘neutral’ individuals agree with the fact that ‘EU provides tangible benefits to citizens in their everyday lives’. It is also worth noting that, compared to 2019, more citizens agreed on the statement that ‘the EU fosters the preservation of traditional values in our society’ (58%, up 15 percentage points).

FIGURE 42 – Common beliefs by Ukrainians with a neutral image of the EU



Levels of optimism are not so high among neutrally oriented citizens – and particularly with regard to the future of their country (63% are ‘not optimistic’ versus 40% of EU supporters). As last year, ‘neutral’ citizens appear very concerned of the current economic situation and all related issues such ‘low living standards and poverty’ (45%), ‘unemployment’ (33%), ‘low salaries and pensions’ (32%), ‘high prices and taxes’ (26%) and the ‘unaffordability of the healthcare’ (23%). Their concerns echo the increase in poverty levels due to the rise of inflation which has particularly impacted on low-income families.

FIGURE 43 – View of the future among Ukrainians with a neutral image of the EU



4. Annex

TABLE 1 – Perceptions 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 of the EU	Total
Settlement size	Equal to or more than 150,000 inhabitants	50%	30%	19%	1%	100%
	Between 20,000 and 150,000 inhabitants	49%	32%	11%	8%	100%
	Less than 20,000 inhabitants	52%	39%	8%	1%	100%
Gender	Male	50%	33%	14%	3%	100%
	Female	53%	36%	10%	1%	100%
Age group	15-34 years	60%	32%	5%	3%	100%
	35-54 years	46%	42%	12%	0%	100%
	55 years & above	48%	30%	20%	2%	100%
Education level	Low/medium level	45%	37%	15%	3%	100%
	High level	59%	32%	9%	0%	100%
Employment status	Employed / Self-employed	51%	38%	10%	1%	100%
	Unemployed or temporarily not working / inactive	51%	34%	13%	2%	100%
Mother tongue	Ukrainian	55%	33%	11%	1%	100%
	Russian	41%	40%	15%	4%	100%
Geographical area	Centre	50%	36%	14%	0%	100%
	East	40%	41%	17%	2%	100%
	West	63%	28%	6%	3%	100%
Total		51%	35%	12%	2%	100%

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	35%	46%	9%	6%	4%	100%
Economic prosperity	41%	40%	10%	5%	4%	100%
Individual Freedom	34%	45%	10%	5%	6%	100%
Freedom of speech	33%	45%	10%	7%	5%	100%
Democracy	32%	45%	10%	6%	7%	100%
Rule of Law	30%	46%	9%	7%	8%	100%
Equality and social justice	31%	43%	15%	5%	6%	100%
Freedom of the media	31%	42%	9%	7%	11%	100%
Peace, Security and Stability	36%	36%	19%	5%	4%	100%
Honesty & Transparency	27%	44%	15%	8%	6%	100%
Respect for other cultures, minorities	30%	39%	15%	8%	8%	100%
Freedom of Religion	28%	38%	13%	7%	14%	100%
Absence of corruption	22%	41%	23%	8%	6%	100%

Percentages refer to Ukrainians who have heard of the EU

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. Please tell me if you tend to trust it or tend not to trust it.					
		Tend to trust	Tend not to trust	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	64%	32%	4%	100%
	Between 20,000 and 150,000 inhabitants	65%	23%	12%	100%
	Less than 20,000 inhabitants	67%	25%	8%	100%
Gender	Male	60%	31%	9%	100%
	Female	70%	24%	6%	100%
Age group	15-34 years	76%	17%	7%	100%
	35-54 years	63%	29%	8%	100%
	55 years & above	58%	35%	7%	100%
Education level	Low/medium level	62%	29%	9%	100%
	High level	69%	25%	6%	100%
Employment status	Employed / Self-employed	62%	30%	8%	100%
	Unemployed or temporarily not working / inactive	67%	26%	7%	100%
Mother tongue	Ukrainian	67%	26%	7%	100%
	Russian	62%	29%	9%	100%
Geographical area	Centre	66%	29%	5%	100%
	East	54%	35%	11%	100%
	West	75%	17%	8%	100%
Total		66%	27%	7%	100%

Percentages refer to Ukrainians who have heard of the EU

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	57%	25%	18%	100%
	Between 20,000 and 150,000 inhabitants	70%	14%	16%	100%
	Less than 20,000 inhabitants	67%	21%	12%	100%
Gender	Male	63%	24%	13%	100%
	Female	65%	19%	16%	100%
Age group	15-34 years	73%	14%	13%	100%
	35-54 years	60%	28%	12%	100%
	55 years & above	60%	21%	19%	100%
Education level	Low/medium level	62%	20%	18%	100%
	High level	67%	22%	11%	100%
Employment status	Employed / Self-employed	65%	20%	15%	100%
	Unemployed or temporarily not working / inactive	64%	22%	14%	100%
Mother tongue	Ukrainian	66%	20%	14%	100%
	Russian	59%	25%	16%	100%
Geographical area	Centre	60%	25%	15%	100%
	East	64%	17%	19%	100%
	West	69%	21%	10%	100%
Total		64%	21%	15%	100%

Percentages refer to Ukrainians who have heard of the EU

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	59%	30%	11%	100%
	Between 20,000 and 150,000 inhabitants	54%	33%	13%	100%
	Less than 20,000 inhabitants	67%	23%	10%	100%
Gender	Male	64%	28%	8%	100%
	Female	60%	27%	13%	100%
Age group	15-34 years	64%	24%	12%	100%
	35-54 years	67%	25%	8%	100%
	55 years & above	56%	32%	12%	100%
Education level	Low/medium level	54%	33%	13%	100%
	High level	72%	20%	8%	100%
Employment status	Employed / Self-employed	65%	25%	10%	100%
	Unemployed or temporarily not working / inactive	61%	28%	11%	100%
Mother tongue	Ukrainian	64%	24%	12%	100%
	Russian	57%	36%	7%	100%
Geographical area	Centre	65%	24%	11%	100%
	East	52%	35%	13%	100%
	West	68%	23%	9%	100%
Total		62%	27%	11%	100%

Percentages refer to Ukrainians who have heard of the EU

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	50%	47%	3%	100%
	Between 20,000 and 150,000 inhabitants	50%	48%	2%	100%
	Less than 20,000 inhabitants	42%	51%	7%	100%
Gender	Male	43%	52%	5%	100%
	Female	48%	47%	5%	100%
Age group	15-34 years	56%	39%	5%	100%
	35-54 years	37%	59%	4%	100%
	55 years & above	44%	50%	6%	100%
Education level	Low/medium level	46%	46%	8%	100%
	High level	46%	52%	2%	100%
Employment status	Employed / Self-employed	45%	49%	6%	100%
	Unemployed or temporarily not working / inactive	46%	49%	5%	100%
Mother tongue	Ukrainian	48%	47%	5%	100%
	Russian	40%	55%	5%	100%
Geographical area	Centre	32%	63%	5%	100%
	East	57%	40%	3%	100%
	West	52%	41%	7%	100%
Total		46%	49%	5%	100%

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

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	49%	51%	100%
	Between 20,000 and 150,000 inhabitants	65%	35%	100%
	Less than 20,000 inhabitants	44%	56%	100%
Gender	Male	53%	47%	100%
	Female	45%	55%	100%
Age group	15-34 years	57%	43%	100%
	35-54 years	44%	56%	100%
	55 years & above	45%	55%	100%
Education level	Low/medium level	42%	58%	100%
	High level	54%	46%	100%
Employment status	Employed / Self-employed	51%	49%	100%
	Unemployed or temporarily not working / inactive	48%	52%	100%
Mother tongue	Ukrainian	47%	53%	100%
	Russian	53%	47%	100%
Geographical area	Centre	45%	55%	100%
	East	52%	48%	100%
	West	49%	51%	100%
Total		49%	51%	100%

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

TABLE 8 – Benefits from current EU support

2.8. 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
Access to more products and services	22%	43%	18%	15%	2%	100%
More tourism	24%	39%	21%	11%	5%	100%
Improved trade	16%	40%	25%	15%	4%	100%
Better education	6%	29%	38%	19%	8%	100%
Greater employment opportunities	11%	24%	35%	28%	2%	100%
Improved democracy	5%	29%	34%	23%	9%	100%
Better law enforcement	4%	27%	39%	26%	4%	100%
Improved infrastructure	5%	25%	38%	28%	4%	100%
Improved agricultural production	4%	24%	33%	29%	10%	100%
Improved quality of health-care system	6%	21%	35%	33%	5%	100%
Greater economic development	4%	16%	40%	34%	6%	100%
Improved quality of the justice system	3%	17%	38%	33%	9%	100%
Less corruption	2%	11%	38%	43%	6%	100%

Percentages refer to Ukrainians who have heard of the EU

TABLE 9 – 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
Greater economic development	18%	57%
Less corruption	19%	43%
Greater employment opportunities	13%	34%
Improved quality of health-care system	9%	31%
Improved agricultural production	9%	26%
Improved infrastructure	4%	15%
Better education	5%	15%
Improved quality of the justice system	3%	13%
Better law enforcement	3%	13%
Improved democracy	3%	11%
More tourism	3%	9%
Improved trade	3%	9%
Access to more products and services	1%	7%

Percentages refer to Ukrainians who have heard of the EU

TABLE 10 – 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	Social media or the Internet	Total	
Settlement size	Equal to or more than 150,000 inhabitants	14%	21%	65%	100%	42%
	Between 20,000 and 150,000 inhabitants	11%	30%	59%	100%	40%
	Less than 20,000 inhabitants	8%	34%	58%	100%	52%
Gender	Male	12%	24%	64%	100%	50%
	Female	9%	33%	58%	100%	44%
Age group	15-34 years	10%	5%	85%	100%	45%
	35-54 years	15%	16%	69%	100%	42%
	55 years & above	7%	65%	28%	100%	53%
Education level	Low/medium level	9%	40%	51%	100%	50%
	High level	12%	15%	73%	100%	43%
Employment status	Employed/ Self-employed	16%	9%	75%	100%	46%
	Unemployed or temporarily not working / inactive	9%	34%	57%	100%	47%
Mother tongue	Ukrainian	10%	31%	59%	100%	46%
	Russian	14%	21%	65%	100%	51%
Geographical area	Centre	8%	31%	61%	100%	47%
	East	17%	30%	53%	100%	46%
	West	8%	25%	67%	100%	48%
Total		11%	29%	60%	100%	47%

TABLE 11 – Frequent usage of media in Ukrainian, 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	64%	64%	10%
	Between 20,000 and 150,000 inhabitants	54%	60%	9%
	Less than 20,000 inhabitants	66%	47%	7%
Gender	Male	57%	58%	9%
	Female	68%	53%	8%
Age group	15-34 years	55%	53%	9%
	35-54 years	61%	59%	10%
	55 years & above	73%	53%	7%
Education level	Low/medium level	68%	51%	5%
	High level	58%	60%	12%
Employment status	Employed / Self-employed	54%	52%	11%
	Unemployed or temporarily not working / inactive	66%	56%	8%
Mother tongue	Ukrainian	71%	51%	5%
	Russian	38%	70%	19%
Geographical area	Centre	65%	64%	6%
	East	55%	66%	6%
	West	69%	36%	13%
Total		63%	55%	9%

TABLE 12 – Trust towards different type of media

Q3.9. & Q3.10. What is your level of trust in the following media as a source of information?				
	Tend to trust	Tend not to trust	Don't know	Total
Official EU websites	32%	20%	48%	100%
Television	47%	42%	11%	100%
Radio	22%	35%	43%	100%
Print media	30%	34%	36%	100%
Social media	51%	25%	24%	100%
Internet	56%	18%	26%	100%
Word of mouth	70%	15%	15%	100%
Country's media in national language	60%	32%	8%	100%
Country's media in Russian	43%	43%	14%	100%
Country's media in other languages	19%	29%	52%	100%
Foreign media in Russian	34%	39%	27%	100%
Foreign media in other languages	21%	30%	49%	100%

TABLE 13 – 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	54%	46%	100%
	Between 20,000 and 150,000 inhabitants	58%	42%	100%
	Less than 20,000 inhabitants	60%	40%	100%
Gender	Male	60%	40%	100%
	Female	56%	44%	100%
Age group	15-34 years	58%	42%	100%
	35-54 years	53%	47%	100%
	55 years & above	62%	38%	100%
Education level	Low/medium level	55%	45%	100%
	High level	61%	39%	100%
Employment status	Employed / Self-employed	60%	40%	100%
	Unemployed or temporarily not working / inactive	57%	43%	100%
Mother tongue	Ukrainian	58%	42%	100%
	Russian	55%	45%	100%
Geographical area	Centre	56%	44%	100%
	East	45%	55%	100%
	West	71%	29%	100%
Total		58%	42%	100%

Percentages refer to Ukrainians who have heard of the EU

TABLE 14 – 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	51%	32%	10%	7%	100%
	Between 20,000 and 150,000 inhabitants	36%	45%	5%	14%	100%
	Less than 20,000 inhabitants	48%	41%	4%	7%	100%
Gender	Male	47%	38%	7%	8%	100%
	Female	48%	38%	6%	8%	100%
Age group	15-34 years	52%	34%	2%	12%	100%
	35-54 years	47%	38%	9%	6%	100%
	55 years & above	43%	42%	8%	7%	100%
Education level	Low/medium level	47%	36%	7%	10%	100%
	High level	49%	40%	5%	6%	100%
Employment status	Employed / Self-employed	48%	36%	8%	8%	100%
	Unemployed or temporarily not working / inactive	47%	39%	6%	8%	100%
Mother tongue	Ukrainian	50%	35%	6%	9%	100%
	Russian	39%	47%	8%	6%	100%
Geographical area	Centre	47%	40%	7%	6%	100%
	East	41%	38%	9%	12%	100%
	West	54%	35%	4%	7%	100%
Total		48%	38%	6%	8%	100%

Percentages refer to Ukrainians who have heard of the EU

TABLE 15 – 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	13%	46%	41%	100%
	Between 20,000 and 150,000 inhabitants	9%	50%	41%	100%
	Less than 20,000 inhabitants	14%	33%	53%	100%
Gender	Male	15%	39%	46%	100%
	Female	11%	41%	48%	100%
Age group	15-34 years	14%	42%	44%	100%
	35-54 years	13%	45%	42%	100%
	55 years & above	11%	34%	55%	100%
Education level	Low/medium level	8%	35%	57%	100%
	High level	19%	46%	35%	100%
Employment status	Employed / Self-employed	22%	40%	38%	100%
	Unemployed or temporarily not working / inactive	11%	40%	49%	100%
Mother tongue	Ukrainian	12%	37%	51%	100%
	Russian	17%	51%	32%	100%
Geographical area	Centre	17%	46%	37%	100%
	East	13%	50%	37%	100%
	West	9%	25%	66%	100%
Total		13%	40%	47%	100%

Percentages refer to Ukrainians who have heard of the EU

TABLE 16 – Satisfaction with democracy in Ukraine

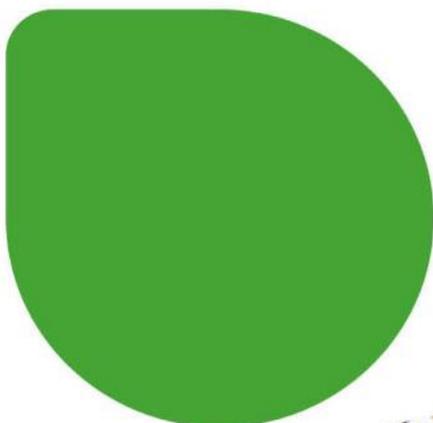
Q4.3. On the whole, are you 'very satisfied', 'fairly satisfied', 'not very satisfied' or 'not at all satisfied' with the way democracy works in Ukraine?		Satisfied	Not satisfied	Don't know	Total
Settlement size	Equal to or more than 150,000 inhabitants	27%	68%	5%	100%
	Between 20,000 and 150,000 inhabitants	22%	64%	14%	100%
	Less than 20,000 inhabitants	37%	56%	7%	100%
Gender	Male	30%	64%	6%	100%
	Female	32%	59%	9%	100%
Age group	15-34 years	42%	50%	8%	100%
	35-54 years	27%	68%	5%	100%
	55 years & above	25%	66%	9%	100%
Education level	Low/medium level	32%	58%	10%	100%
	High level	30%	66%	4%	100%
Employment status	Employed / Self-employed	29%	65%	6%	100%
	Unemployed or temporarily not working / inactive	32%	60%	8%	100%
Mother tongue	Ukrainian	33%	59%	8%	100%
	Russian	24%	69%	7%	100%
Geographical area	Centre	34%	59%	7%	100%
	East	27%	70%	3%	100%
	West	31%	57%	12%	100%
Total		31%	62%	7%	100%

TABLE 17 – 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	43%	55%	2%	100%
	Between 20,000 and 150,000 inhabitants	38%	59%	3%	100%
	Less than 20,000 inhabitants	44%	53%	3%	100%
Gender	Male	39%	59%	2%	100%
	Female	46%	51%	3%	100%
Age group	15-34 years	54%	44%	2%	100%
	35-54 years	38%	60%	2%	100%
	55 years & above	36%	60%	4%	100%
Education level	Low/medium level	40%	57%	3%	100%
	High level	46%	52%	2%	100%
Employment status	Employed / Self-employed	39%	58%	3%	100%
	Unemployed or temporarily not working / inactive	44%	54%	2%	100%
Mother tongue	Ukrainian	47%	50%	3%	100%
	Russian	31%	69%	0%	100%
Geographical area	Centre	43%	56%	1%	100%
	East	45%	54%	1%	100%
	West	41%	54%	5%	100%
Total		43%	55%	2%	100%

TABLE 18 – 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	56%	40%	4%	100%
	Between 20,000 and 150,000 inhabitants	67%	31%	2%	100%
	Less than 20,000 inhabitants	56%	42%	2%	100%
Gender	Male	60%	36%	4%	100%
	Female	56%	42%	2%	100%
Age group	15-34 years	79%	19%	2%	100%
	35-54 years	61%	38%	1%	100%
	55 years & above	34%	61%	5%	100%
Education level	Low/medium level	51%	45%	4%	100%
	High level	65%	33%	2%	100%
Employment status	Employed / Self-employed	62%	36%	2%	100%
	Unemployed or temporarily not working / inactive	57%	40%	3%	100%
Mother tongue	Ukrainian	60%	38%	2%	100%
	Russian	51%	45%	4%	100%
Geographical area	Centre	60%	39%	1%	100%
	East	63%	34%	3%	100%
	West	50%	45%	5%	100%
Total		58%	39%	3%	100%



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