Opportunities and Challenges Facing Ukraine’s Democratic Transition

July 2018 Nationwide Survey with Seven Oversamples
May 2018 Focus Group Discussions

The research is funded by the United States Agency for International Development (USAID), the National Endowment for Democracy (NED), the Government of Sweden and UK Aid.

Survey fieldwork was conducted by the Kyiv International Institute of Sociology
Focus group fieldwork was conducted by GfK Ukraine

NDI Ukraine
Survey Oversample Locations and Regions
Survey

- Fieldwork dates: July 3 – July 31, 2018
- 5,784 completed interviews
  - The nationally representative sample was random at all stages:
    - Random selection of election precincts
    - Random selection of households via random route sampling
    - Random selection of respondents within the households using modified Kish grid
  - Areas outside the control of the Ukrainian government were excluded
- Seven oversamples
  - Kyiv city [600]
  - Kharkiv city [600]
  - Kramatorsk Region [600] - cities of Kramatorsk and Slovyansk and surrounding rural areas
  - Kherson Oblast [600]
  - Odesa city [600]
  - Lviv city [600]
  - Ternopil Oblast [600]
- Quality control:
  - All interviewers received a four level training system which includes 16 hours of training
  - An independent network of controllers conducted quality control interviews
    - 32% of all interviews were checked by controllers
- All 5,784 interviews were conducted using tablets
Methodology 2

- The average margin of error for this survey is +/- 3%
- The margin of error is different for every response to every question in all surveys. In this presentation, the margin of error is shown for each question/option.
- This is shown in the example below:
  - A is statistically greater than B and C.
  - There is no statistical difference between B and C.
ISSUE PRIORITIES & SOCIETAL TRENDS
Which of the following reforms should be the highest priority for the next government? (q3) - (select up to three)

- Anti-corruption: 63
- Remove MP immunity: 52
- Pension reform: 28
- Strengthen the army: 23
- Judicial reform: 18
- Police reform: 12
- Energy security: 11
- Land reform: 10
- Education reform: 9
- Decentralization: 7
- Tax reform: 6
- Other: 10
- I can’t name any/DK: 5
Overall, do you expect the next generation to be …?
“Better off than yours” only (q4 X Settlement)
75% think the current parliament consists of mostly men or significantly more men than women. Only 27% think this should be the case.
In your opinion, who should be more involved in political life, men or women?

“Men slightly more than women/Men and women equally/Men slightly less than women/
Men significantly less than women/Mostly women” only (q25 X Settlement)
If there was an equal balance of men and women in elected office, would there be...? (q27)

- **More focus on your everyday concerns**
  - Agree: 50
  - Disagree: 27

- **Less corruption**
  - Agree: 26
  - Disagree: 41

- **Fewer opportunities for men**
  - Agree: 22
  - Disagree: 59

- **Fewer qualified leaders**
  - Agree: 14
  - Disagree: 68
DEMOCRACY, INSTITUTIONS & DECENTRALISATION
### Most important characteristics of a fully functioning democracy (q16) - (select up to three)

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>December 2016</th>
<th>April 2017</th>
<th>July 2017</th>
<th>December 2017</th>
<th>July 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equal justice for all</td>
<td>68</td>
<td>63</td>
<td>60</td>
<td>66</td>
<td>59</td>
</tr>
<tr>
<td>Free and fair elections</td>
<td>49</td>
<td>50</td>
<td>46</td>
<td>49</td>
<td>53</td>
</tr>
<tr>
<td>Freedom of speech</td>
<td>44</td>
<td>44</td>
<td>44</td>
<td>45</td>
<td></td>
</tr>
<tr>
<td>Political parties represent citizens’ interests</td>
<td>31</td>
<td>32</td>
<td>34</td>
<td>30</td>
<td>35</td>
</tr>
<tr>
<td>Government is accountable to citizens</td>
<td>31</td>
<td>32</td>
<td>30</td>
<td>29</td>
<td>27</td>
</tr>
<tr>
<td>Government is transparent</td>
<td>29</td>
<td>28</td>
<td>26</td>
<td>24</td>
<td>26</td>
</tr>
<tr>
<td>Minority rights are protected</td>
<td>9</td>
<td>8</td>
<td>9</td>
<td>11</td>
<td></td>
</tr>
</tbody>
</table>
How important is it to you that Ukraine becomes a fully functioning democracy? “Very important/Important” only (q17 X Settlement)
Which of the following statements you agree with? “Government is like an employee; the people should be the bosses who control the government” only (q56 X Settlement)
Do you think the next government will represent your interests better than the current one? “No” only (q8 X Settlement)
The only significant change since July 2017 is MPs, up 5% ‘Yes’.
Since July of 2015, many communities in Ukraine have gone through the amalgamation process. Has your community gone through this process? (q11)

NDI estimates that 33% were living in amalgamated communities by July 2018.
Since July of 2015, many communities in Ukraine have gone through the amalgamation process. How would you evaluate the impact on your/these communities? "Good/Somewhat good" only (q12/q13 X Settlement)
Have you done any of these since November 2013?
"Attend a community meeting" only (q55)

Yes, at least once
- May 2016: 24
- December 2016: 23
- July 2017: 25
- December 2017: 24
- July 2018: 21

I would if I had the chance
- May 2016: 24
- December 2016: 29
- July 2017: 28
- December 2017: 25
- July 2018: 29

I would never do this
- May 2016: 44
- December 2016: 40
- July 2017: 36
- December 2017: 46
- July 2018: 41
‘Big threat’ responses remained broadly stable, apart from political uncertainty which has risen 12% since December 2017.
INTERNATIONAL RELATIONS
By 2030, do you want Ukraine to be a member state of the EU? “Yes” only (q42 X Settlement)
EUROPEAN UNION MEMBERSHIP
Want European Union only; Want European Union and the Customs Union and/or a non-aligned country (q42)

December 2017

Want the EU and other options (Customs Union and/or non-alignment) 54%

Want EU membership only 36%

July 2018

Want the EU and other options (Customs Union and/or non-alignment) 53%

Want EU membership only 42%

*In July 2018, there was a date change in question from 2020 to 2030*
Focus Group Associations with the European Union

*Participants in Focus Groups in Kharkiv, Kramatorsk, Odesa and Kherson Associate the EU with Stability, Quality of Life, Freedom, Visa-Free Travel and Prosperity, May 2018
By 2030, do you want Ukraine to be a member state of the Customs Union? “Yes” only (q42 X Settlement)
EURASIA CUSTOMS UNION MEMBERSHIP

Want the Customs Union only; Want the Customs Union and the EU/non-aligned country (q42)

Want the Customs Union and other options (the EU and/or non-alignment) 13%

Want CU membership only 4%
By 2030, do you want Ukraine to be a member state of NATO? “Yes” only (q42 X Settlement)
<table>
<thead>
<tr>
<th>Country</th>
<th>Influence Level</th>
<th>USA</th>
<th>EU</th>
<th>Russia</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>A lot</td>
<td>52</td>
<td>33</td>
<td>54</td>
</tr>
<tr>
<td></td>
<td>Some</td>
<td>30</td>
<td>25</td>
<td>28</td>
</tr>
<tr>
<td></td>
<td>A little</td>
<td>6</td>
<td>8</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>Very positive/Positive</td>
<td>27</td>
<td>33</td>
<td>44</td>
</tr>
<tr>
<td></td>
<td>Very negative/Negative</td>
<td>36</td>
<td>25</td>
<td>44</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
In your opinion, the influence of Russia, in determining Ukraine’s future, is...? (q45 X Settlement)

- **Very positive/Positive**
- **Very negative/Negative**

<table>
<thead>
<tr>
<th>Region</th>
<th>Very positive</th>
<th>Very negative</th>
</tr>
</thead>
<tbody>
<tr>
<td>NATIONAL</td>
<td>77</td>
<td>3</td>
</tr>
<tr>
<td>CENTER/NORTH</td>
<td>80</td>
<td>9</td>
</tr>
<tr>
<td>Kyiv</td>
<td>70</td>
<td>9</td>
</tr>
<tr>
<td>EAST</td>
<td>66</td>
<td>7</td>
</tr>
<tr>
<td>Kharkiv</td>
<td>74</td>
<td>6</td>
</tr>
<tr>
<td>Kramatorsk Region</td>
<td>47</td>
<td>6</td>
</tr>
<tr>
<td>SOUTH</td>
<td>70</td>
<td>5</td>
</tr>
<tr>
<td>Kherson Oblast</td>
<td>66</td>
<td>6</td>
</tr>
<tr>
<td>Odesa</td>
<td>53</td>
<td>7</td>
</tr>
<tr>
<td>WEST</td>
<td>84</td>
<td>1</td>
</tr>
<tr>
<td>Lviv</td>
<td>95</td>
<td>0</td>
</tr>
<tr>
<td>Ternopil Oblast</td>
<td>93</td>
<td>1</td>
</tr>
</tbody>
</table>
Focus Group Associations with Russia

*Participants in Focus Groups in Kharkiv, Kramatorsk, Odesa and Kherson Associate Russia with Aggression and Putin, May 2018*
What would you like/expect for the future of those parts of Donbas that are not under Ukrainian control? (q48/q49)

- **Them to become independent entities**
  - Like: 9
  - Expect: 12

- **Them to become part of Russia**
  - Like: 3
  - Expect: 4

- **Them to be returned to Ukrainian control**
  - Like: 73
  - Expect: 57

- **DK**
  - Like: 14
  - Expect: 26
Which, if any, of the following would you accept as the price for peace? (q50)

- Crimea becomes a recognized part of the Russian Federation
- Donbas never returns to full control of the Ukrainian authorities
- Ukraine loses the right to determine its own future

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Yes</th>
<th>No</th>
<th>DK</th>
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</thead>
<tbody>
<tr>
<td>Crimea becomes a recognized part of the Russian Federation</td>
<td>26</td>
<td>57</td>
<td>16</td>
</tr>
<tr>
<td>Donbas never returns to full control of the Ukrainian authorities</td>
<td>14</td>
<td>60</td>
<td>24</td>
</tr>
<tr>
<td>Ukraine loses the right to determine its own future</td>
<td>7</td>
<td>79</td>
<td>12</td>
</tr>
</tbody>
</table>
DISINFORMATION & MEDIA CONSUMPTION
How often do you access the internet for news?
“Every day/Several times a week” only
(q63 X Settlement)

Since December 2016, ‘every day’ plus ‘several times a week’ has risen from 39% to 51%
How often do you engage with the following platforms? (q65)

- At least once a week
- Once or several times a month
- Never

<table>
<thead>
<tr>
<th>Platform</th>
<th>At least once a week</th>
<th>Once or several times a month</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Viber</td>
<td>47</td>
<td></td>
<td>3</td>
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<td></td>
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<td></td>
<td>47</td>
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<td>Facebook</td>
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<td></td>
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<td>47</td>
</tr>
<tr>
<td>YouTube</td>
<td>39</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>51</td>
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<tr>
<td>Instagram</td>
<td>3</td>
<td></td>
<td>71</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>23</td>
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<tr>
<td>Vkontakte</td>
<td>15</td>
<td></td>
<td>15</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>75</td>
</tr>
<tr>
<td>Odnoklassniki</td>
<td>10</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>81</td>
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<td>Telegram</td>
<td>9</td>
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<td></td>
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<td>85</td>
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<td>Twitter</td>
<td>3</td>
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<td>3</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>85</td>
</tr>
</tbody>
</table>
Kramatorsk has the highest level of Disagree/Don’t Know (45%) followed by Odesa (39%) and Kherson (35%). Kyiv has the lowest level: 9%. 

<table>
<thead>
<tr>
<th>Region</th>
<th>Agree</th>
<th>Disagree</th>
<th>DK</th>
</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>73</td>
<td>14</td>
<td>12</td>
</tr>
<tr>
<td>Center/North</td>
<td>68</td>
<td>16</td>
<td>15</td>
</tr>
<tr>
<td>Kyiv</td>
<td>91</td>
<td>3</td>
<td>6</td>
</tr>
<tr>
<td>East</td>
<td>74</td>
<td>19</td>
<td>17</td>
</tr>
<tr>
<td>Kharkiv</td>
<td>72</td>
<td>12</td>
<td>4</td>
</tr>
<tr>
<td>Kramatorsk Region</td>
<td>54</td>
<td>20</td>
<td>25</td>
</tr>
<tr>
<td>South</td>
<td>74</td>
<td>8</td>
<td>17</td>
</tr>
<tr>
<td>Kherson Oblast</td>
<td>64</td>
<td>17</td>
<td>18</td>
</tr>
<tr>
<td>Odesa</td>
<td>60</td>
<td>9</td>
<td>30</td>
</tr>
<tr>
<td>West</td>
<td>79</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>Lviv</td>
<td>78</td>
<td>16</td>
<td>6</td>
</tr>
<tr>
<td>Ternopil Oblast</td>
<td>67</td>
<td>24</td>
<td>10</td>
</tr>
</tbody>
</table>
Who is the most responsible for spreading of propaganda or disinformation in Ukraine? “Russia (Putin/Russian government)” only (q47 X Settlement) of 73% who agree that propaganda or disinformation is being spread in Ukraine.
In July 2014, Malaysia Airlines Flight 17 crashed over Donetsk. In your opinion, what is the most likely reason for this? “It was shot down by Ukrainian forces/Mechanical failure/Don’t Know” only (q21 X Settlement)

This number was 46% in December 2017. The change can probably be explained by publication of the Joint Investigation Team report in May 2018.
POLITICAL PARTIES, LEADERS & ELECTIONS
What is your attitude toward the following parties today? (q28)

- Batkivshchyna: Very positive/Positive 15, Very negative/Negative 49
- Civic Position: Very positive/Positive 49, Very negative/Negative 27
- Radical party: Very positive/Positive 13, Very negative/Negative 49
- Samopomich: Very positive/Positive 11, Very negative/Negative 38
- For Life: Very positive/Positive 8, Very negative/Negative 54
- Opposition Bloc: Very positive/Positive 8, Very negative/Negative 52
- Agrarian Party: Very positive/Positive 7, Very negative/Negative 39
- Svoboda: Very positive/Positive 5, Very negative/Negative 66
- UKROP: Very positive/Positive 4, Very negative/Negative 32
- BPP-Solidarity: Very positive/Positive 4, Very negative/Negative 51
- Nash Krai: Very positive/Positive 3, Very negative/Negative 38
- Right Sector: Very positive/Positive 3, Very negative/Negative 38
- Movement of New Forces: Very positive/Positive 3, Very negative/Negative 38
- Renaissance: Very positive/Positive 3, Very negative/Negative 38
- Democratic Alliance: Very positive/Positive 3, Very negative/Negative 38
- National Korpus: Very positive/Positive 3, Very negative/Negative 38
- Osnova: Very positive/Positive 3, Very negative/Negative 38
- People's Front: Very positive/Positive 3, Very negative/Negative 38
- Statehood Initiative of Yarosh: Very positive/Positive 3, Very negative/Negative 38
- People's Force: Very positive/Positive 3, Very negative/Negative 38
- Social Democratic Party: Very positive/Positive 3, Very negative/Negative 38
- 5.10: Very positive/Positive 3, Very negative/Negative 38
What is your attitude towards the following parties today?
No positive attitude towards any party (q28 X Settlement)

This figure is down 12% since July 2017
<table>
<thead>
<tr>
<th>Name</th>
<th>Like</th>
<th>Dislike</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volodymyr Zelenskyy</td>
<td>42</td>
<td>26</td>
</tr>
<tr>
<td>Sviatoslav Vakarchuk</td>
<td>35</td>
<td>32</td>
</tr>
<tr>
<td>Anatoly Gritsenko</td>
<td>22</td>
<td>38</td>
</tr>
<tr>
<td>Yulia Tymoshenko</td>
<td>15</td>
<td>63</td>
</tr>
<tr>
<td>Yegor Sobolev</td>
<td>21</td>
<td>13</td>
</tr>
<tr>
<td>Oleh Liashko</td>
<td>19</td>
<td>67</td>
</tr>
<tr>
<td>Andriy Sadovi</td>
<td>16</td>
<td>48</td>
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<tr>
<td>Mustafa Nayem</td>
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<td>29</td>
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<tr>
<td>Rinat Akhmetov</td>
<td>14</td>
<td>61</td>
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<tr>
<td>Vadim Rabinovich</td>
<td>14</td>
<td>53</td>
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<tr>
<td>Yuriy Boyko</td>
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<td>60</td>
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<tr>
<td>Vitaliy Klitchko</td>
<td>12</td>
<td>64</td>
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<tr>
<td>Volodymyr Groisman</td>
<td>17</td>
<td>67</td>
</tr>
<tr>
<td>Oleh Tyahnybok</td>
<td>14</td>
<td>69</td>
</tr>
<tr>
<td>Petro Poroshenko</td>
<td>10</td>
<td>70</td>
</tr>
<tr>
<td>Yurii Lutsenko</td>
<td>8</td>
<td>78</td>
</tr>
<tr>
<td>Andriy Parubiy</td>
<td>7</td>
<td>73</td>
</tr>
<tr>
<td>Arseniy Yatsenyuk</td>
<td>5</td>
<td>73</td>
</tr>
<tr>
<td>Arsen Avakov</td>
<td>4</td>
<td>76</td>
</tr>
<tr>
<td>Viktor Bondar</td>
<td>3</td>
<td>81</td>
</tr>
</tbody>
</table>
When deciding which candidate to vote for in the next parliamentary elections, what is important to you? (q10) - (select up to three)

- The honesty of candidate: 49
- Their program/The promises they make: 33
- Experience in civic activism: 27
- Education: 23
- The political party that nominates them: 16
- Age: 12
- The region they come from: 8
- Business experience: 8
- Military experience: 6
- Gender: 5
- Their religion: 3
- Other: 2
Although the overall level of party affiliation has improved over the past year, willingness to participate in elections has decreased somewhat.
On this measure, there is no clear leader in the parliamentary contest so far.
Which party would you vote for if parliamentary elections were held tomorrow?
No preference only (q31 X Settlement)

No change since July 2017

National - 57%

West 54%
Lviv 42%
Ternopil 42%
Oblast

Center-North 67%
Kyiv 59%

South 64%
Odesa 63%

East 43%

Kherson 53%
Kramatorsk 52%
Region

No change since July 2017
Ukraine’s Electoral Iceberg
Parliamentary Elections (q30 X q31)

- 29% Certain to vote (30% undecided)
- 23% Probable voters (47% undecided)
- 18% Ambivalent (74% undecided)
- 11% Very unlikely to vote (84% undecided)
- 9% Certain not to vote (78% undecided)
There has been a larger drop in participation for Presidential than for Parliamentary elections.
If first round of the presidential election was held tomorrow, for whom would you vote? (q34)

- **DK/RA**: 62 (First choice), 38 (Second choice)
- **Yulia Tymoshenko**: 13 (First choice), 10 (Second choice)
- **Anatoliy Hrytsenko**: 4 (First choice), 6 (Second choice)
- **Oleh Liashko**: 2 (First choice), 5 (Second choice)
- **Yuriy Boiko**: 2 (First choice), 5 (Second choice)
- **Petro Poroshenko**: 1 (First choice), 4 (Second choice)
- **Sviatoslav Vakarchuk**: 1 (First choice), 4 (Second choice)
- **Vadym Rabinovych**: 1 (First choice), 3 (Second choice)
- **Andriy Sadovyi**: 1 (First choice), 2 (Second choice)
- **Volodymyr Hroisman**: 1 (First choice), 2 (Second choice)
- **Oleksandr Vilkul**: 1 (First choice), 1 (Second choice)
- **Andriy Biletskyi**: 1 (First choice), 1 (Second choice)
- **Other**: 6 (First choice), 5 (Second choice)
- **Will not vote**: 12 (First choice), 2 (Second choice)
- **Spoil a ballot**: 3 (First choice), 3 (Second choice)
If the first round of presidential elections were held tomorrow, for whom would you vote?
No preference only (q34 X Settlement)
Ukraine’s Electoral Iceberg
Presidential Elections (q33 X q34)

30% Certain to vote
(37% undecided)

26% Probable voters
(36% undecided)

16% Ambivalent
(54% undecided)

9% Very unlikely to vote
(78% undecided)

8% Certain not to vote
(97% undecided)