Opportunities and Challenges Facing Ukraine’s Democratic Transition

Nationwide Survey, September 2019

Online Daily Tracking and Panel Survey, June-August, 2019

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Survey fieldwork was conducted by the Kyiv International Institute of Sociology
Online Daily Tracking and Panel Survey fieldwork is conducted by Info Sapiens

NDI Ukraine
SURVEY REGIONS

Fieldwork dates: August 24 – September 9, 2019
2,004 completed interviews
ISSUES & SOCIETAL TRENDS
How important is it to you that Ukraine becomes a fully functioning democracy?
“Very important/Important” only (q5 X Settlement)
There are many characteristics of a fully functioning democracy. Which three do you think are most important? (q4)

- Human rights are protected: December 2018: 45, May 2019: 49, September 2019: 46
The national ratio is now 5:1. The trend remains positive everywhere. West went from 2:1 optimistic to almost 9:1.
There are different opinions regarding the direction in which Ukraine is going. In your opinion... (q3)
Government is like an employee; the people should be the bosses who control the government. “Strongly agree/Agree” only (q35 X Settlement)
Are any of the following interested in hearing your opinions? "Yes" only (q36)

<table>
<thead>
<tr>
<th>Role</th>
<th>May 2019</th>
<th>September 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>President Volodymyr Zelenskyi</td>
<td>49</td>
<td>52</td>
</tr>
<tr>
<td>Local councilor</td>
<td>23</td>
<td>31</td>
</tr>
<tr>
<td>Mayor</td>
<td>26</td>
<td>29</td>
</tr>
<tr>
<td>Member of Parliament</td>
<td>11</td>
<td>25</td>
</tr>
<tr>
<td>National Government</td>
<td>9</td>
<td>24</td>
</tr>
<tr>
<td>Political parties</td>
<td>10</td>
<td>20</td>
</tr>
<tr>
<td>Governor</td>
<td>11</td>
<td>18</td>
</tr>
</tbody>
</table>
Are any of the following interested in hearing your opinions?
"National government" only (q36)

July 2017  | July 2018  | December 2018 | May 2019  | September 2019
---|---|---|---|---
Yes: 5 6 7 9 24 | 82 | 84 | 81 | 79 | 44
No: 13 10 11 12 | 31

DK: 13 10 11 12 31
Most important national issues (q1) Part 1

July 2018 | December 2018 | May 2019 | September 2019

Conflict in Eastern Ukraine
- 38
- 41
- 47
- 52

Rising prices
- 53
- 59
- 49
- 42

Corruption
- 41
- 38
- 42
- 37

Health Care
- 39
- 42
- 35
- 32

Pensions
- 28
- 28
- 25
- 26

Employment
- 29
- 26
- 26
- 23
In your opinion, who is/should be more involved in political life, men or women? (q11/q12)

- Mostly men: Current situation 27, Actual preferences 9
- Men significantly more than women: Current situation 39, Actual preferences 16
- Men slightly more than women: Current situation 18, Actual preferences 21
- Men and women equally: Current situation 11, Actual preferences 41
- Men slightly less than women: Current situation 1, Actual preferences 4
- Men significantly less than women: Current situation 0, Actual preferences 1
- Mostly women: Current situation 0, Actual preferences 1
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” only (q12 X Settlement)
Different reasons are given for the fact that there are fewer women than men in elected office in Ukraine. Which of the following statements do you agree with?

(q13)

- **Political parties are more likely to nominate men than women**
  - Agree: 67
  - Disagree: 21

- **Family duties don’t allow women time to run for office**
  - Agree: 60
  - Disagree: 31

- **Ukrainians are more likely to vote for men than women**
  - Agree: 53
  - Disagree: 32

- **Women have less access to resources to campaign**
  - Agree: 47
  - Disagree: 35

- **Women are less interested in politics than men**
  - Agree: 41
  - Disagree: 46

- **There are not enough qualified women for elected office**
  - Agree: 21
  - Disagree: 66
TRUST, EXPECTATIONS AND ENGAGEMENT
To what extent do you agree or disagree that President Volodymyr Zelenskyy will make changes that matter to you? (q23 X Settlement)

<table>
<thead>
<tr>
<th>Region</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>NATIONAL</td>
<td>66</td>
<td>15</td>
</tr>
<tr>
<td>CENTER/NORTH</td>
<td>66</td>
<td>17</td>
</tr>
<tr>
<td>EAST</td>
<td>72</td>
<td>12</td>
</tr>
<tr>
<td>SOUTH</td>
<td>71</td>
<td>11</td>
</tr>
<tr>
<td>WEST</td>
<td>58</td>
<td>18</td>
</tr>
</tbody>
</table>

- **May 2019**
- **September 2019**
President Volodymyr Zelenskyy was elected in April 2019. How would you rate his performance so far? (q7 X Settlement)

- **Very Good/Good**
- **Neither bad nor good**
- **Very bad/bad**

### NATIONAL
- Very Good/Good: 52%
- Neither bad nor good: 34%
- Very bad/bad: 6%

### CENTER/NORTH
- Very Good/Good: 56%
- Neither bad nor good: 31%
- Very bad/bad: 6%

### EAST
- Very Good/Good: 42%
- Neither bad nor good: 38%
- Very bad/bad: 7%

### SOUTH
- Very Good/Good: 39%
- Neither bad nor good: 49%
- Very bad/bad: 2%

### WEST
- Very Good/Good: 61%
- Neither bad nor good: 27%
- Very bad/bad: 6%
To what extent do you agree or disagree that the newly elected Parliament will make changes that matter to you? (q24 X Settlement)

- **Completely agree/Somewhat agree**
- **Completely disagree/Somewhat disagree**

<table>
<thead>
<tr>
<th>Region</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>72</td>
<td>11</td>
</tr>
<tr>
<td>Center/North</td>
<td>76</td>
<td>11</td>
</tr>
<tr>
<td>East</td>
<td>69</td>
<td>13</td>
</tr>
<tr>
<td>South</td>
<td>71</td>
<td>6</td>
</tr>
<tr>
<td>West</td>
<td>73</td>
<td>12</td>
</tr>
</tbody>
</table>
Which of the following promises, if any, are the most important to you/do you expect to see achieved in the next twelve months? (q25/q26) Part 1

- Important to you
- Expect to be achieved in the next twelve months

- Negotiating peace
  - Important to you: 48
  - Expect to be achieved: 49

- Remove immunity from MPs, President and judges
  - Important to you: 40
  - Expect to be achieved: 46

- Well-being for all
  - Important to you: 38
  - Expect to be achieved: 29

- Healthcare reform
  - Important to you: 22
  - Expect to be achieved: 22

- Anti-corruption reform
  - Important to you: 21
  - Expect to be achieved: 20

- Pension reform
  - Important to you: 19
  - Expect to be achieved: 17

- Business environment reform
  - Important to you: 10
  - Expect to be achieved: 11

- Law on impeachment of President of Ukraine
  - Important to you: 8
  - Expect to be achieved: 13

- Infrastructure
  - Important to you: 7
  - Expect to be achieved: 9

- Strengthen the army
  - Important to you: 7
  - Expect to be achieved: 9
Would you be willing to participate in the government decision-making processes on issues that matter to you? “Yes” only (q9 X Settlement)
INTERNATIONAL RELATIONS, CONFLICT & THREATS
How much influence, if any, do the following have in determining Ukraine’s future? (q42) Is this influence...? (q43)

<table>
<thead>
<tr>
<th></th>
<th>USA</th>
<th>EU</th>
<th>Russia</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>A lot</td>
<td>Some</td>
<td>A little</td>
</tr>
<tr>
<td>A lot</td>
<td>42</td>
<td>31</td>
<td>10</td>
</tr>
<tr>
<td>Some</td>
<td>35</td>
<td>35</td>
<td>13</td>
</tr>
<tr>
<td>A little</td>
<td>49</td>
<td>24</td>
<td>10</td>
</tr>
</tbody>
</table>
By 2030, do you want Ukraine to be a member state of the EU?
“Yes” only (q40 X Settlement)

National result has not changed significantly since May 2019.
Center/North is down 8%, South is down 8%.
By 2030, do you want Ukraine to be a member state of NATO? “Yes” only (q40 X Settlement)

National result has not changed significantly since May 2019. East is up 4%, Center/North is down 8%.
What would you like/expect for the future of those parts of Donbas that are not under Ukrainian control? (q44/q45)

<table>
<thead>
<tr>
<th>Option</th>
<th>Want</th>
<th>Expect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Them to become independent entities</td>
<td>7</td>
<td>9</td>
</tr>
<tr>
<td>Them to become part of Russia</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Them to be returned to Ukrainian control</td>
<td>80</td>
<td>64</td>
</tr>
<tr>
<td>DK</td>
<td>9</td>
<td>21</td>
</tr>
</tbody>
</table>
Which, if any, of the following would you accept as the price for peace?
(q46)

Result on self-determination has been consistent in every survey wave since 2015
<table>
<thead>
<tr>
<th>Threat</th>
<th>Big threat</th>
<th>Some threat</th>
<th>No threat at all</th>
<th>DK</th>
<th>RA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Russian military aggression</td>
<td>61</td>
<td>21</td>
<td>9</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>Economic uncertainty</td>
<td>57</td>
<td>30</td>
<td>6</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>Disinformation or propaganda</td>
<td>49</td>
<td>33</td>
<td>11</td>
<td>6</td>
<td>1</td>
</tr>
<tr>
<td>Political uncertainty</td>
<td>43</td>
<td>38</td>
<td>8</td>
<td>10</td>
<td>1</td>
</tr>
<tr>
<td>Moving closer to Russia</td>
<td>27</td>
<td>27</td>
<td>30</td>
<td>14</td>
<td>2</td>
</tr>
<tr>
<td>Decreasing the status of minority languages</td>
<td>16</td>
<td>27</td>
<td>45</td>
<td>10</td>
<td>1</td>
</tr>
<tr>
<td>European/US values</td>
<td>10</td>
<td>23</td>
<td>51</td>
<td>16</td>
<td>1</td>
</tr>
<tr>
<td>Moving closer to the West</td>
<td>7</td>
<td>18</td>
<td>61</td>
<td>12</td>
<td>1</td>
</tr>
</tbody>
</table>
POST ELECTION
Do you think most people you know will trust the official results of the parliamentary elections are accurate?

- Yes
- No
Do you think 2019 parliamentary election were free and fair? “Fully free and fair/Somewhat free and fair” only (q17 X Settlement)
ATTITUDES TOWARDS POLITICAL PARTIES AND LEADERS
In your experience, do political parties currently do any of the following? "Yes" only (q38)

- Act with impunity: May 2019 (88), September 2019 (65)
- Represent the interests of oligarchs: May 2019 (87), September 2019 (65)
- Engage in nepotism: May 2019 (85), September 2019 (63)
- Participate in corruption: May 2019 (87), September 2019 (63)
- Propose reforms: May 2019 (34), September 2019 (53)
- Bring together like-minded people: May 2019 (32), September 2019 (52)
- Provide leaders for the country: May 2019 (25), September 2019 (38)
- Represent citizens’ interests: May 2019 (5), September 2019 (25)
- Meet your expectations: May 2019 (13), September 2019 (19)
- Keep their promises: May 2019 (41), September 2019 (16)
Very positive/Positive for Servant of the People is up 26% since May 2019.
Which party would you say is closest to you now? No preference (q29)
Which party would you say is closest to you now? (q29)

- Servant of the People: First Choice 55, Second Choice 12
- No party is close to me: First Choice 9, Second Choice 10
- Opposition Platform - For Life: First Choice 7, Second Choice 5
- European Solidarity: First Choice 2, Second Choice 5
- Batkivshchyna: First Choice 4, Second Choice 7
- Holos: First Choice 3, Second Choice 10
- Power and Honor: First Choice 2, Second Choice 4
- Svoboda: First Choice 1, Second Choice 1
- Radical Party of Oleh Liashko: First Choice 1, Second Choice 2
- Other: First Choice 5, Second Choice 13
- DK: First Choice 5, Second Choice 38
- RA: First Choice 4, Second Choice 6
Of the following people, please tell me whether you like or dislike... (q30)
LOCAL ELECTIONS
If local elections were held tomorrow, would you vote? (q31 X Settlement)

- **NATIONAL**
  - Certain to vote (10/10): 53
  - Probable voters (7-9/10): 23

- **CENTER/NORTH**
  - Certain to vote (10/10): 56
  - Probable voters (7-9/10): 21

- **EAST**
  - Certain to vote (10/10): 52
  - Probable voters (7-9/10): 19

- **SOUTH**
  - Certain to vote (10/10): 51
  - Probable voters (7-9/10): 26

- **WEST**
  - Certain to vote (10/10): 52
  - Probable voters (7-9/10): 28
When deciding which political party to vote for in the next local elections, what is the most important to you? (q33)

- Represents people like me: 34
- Strong team: 32
- Wants to hear my opinion: 29
- Their promises/program: 29
- Does not represent oligarchs interests: 24
- Has a lot of new faces on its list: 24
- Strong leadership: 23
- Supports closer ties with the EU and US: 10
- Supports closer ties with Russia: 6
When deciding which candidate to vote for in the next local elections, what is important to you? (q34)

Understanding of local problems: 48
Honesty of the candidate: 41
Close to the people: 35
Their programs/promises: 33
Experience in civic activism: 19
Party that nominates: 19
Education: 14
Region they come from: 8
Business experience: 6
Age: 6
Military experience: 4
Gender: 2
MEDIA CONSUMPTION
How often do you access the internet for news? (q49)

- Every day
- Several times a week
- Once a week
- A few times a month
- Once a month
- Never
How often do you access the internet for news?
Regular users only (q49 X Settlement)

National - 65%
West 69%
Center/North 63%
East 63%
South 68%
How often do you engage with the following platforms? "Once a week or more often" only (q50)

- **YouTube**
  - December 2018: 41
  - May 2019: 53
  - September 2019: 52

- **Viber**
  - December 2018: 42
  - May 2019: 57
  - September 2019: 51

- **Facebook**
  - December 2018: 40
  - May 2019: 55
  - September 2019: 51

- **Instagram**
  - December 2018: 20
  - May 2019: 29
  - September 2019: 31

- **Telegram**
  - December 2018: 7
  - May 2019: 15
  - September 2019: 17

- **WhatsApp**
  - December 2018: 8
  - May 2019: 15
  - September 2019: 15

- **Twitter**
  - December 2018: 8
  - May 2019: 11
  - September 2019: 10

- **Vkontakte**
  - December 2018: 9
  - May 2019: 11
  - September 2019: 9

- **Odnoklassniki**
  - December 2018: 6
  - May 2019: 8
  - September 2019: 7
Survey Methodology

• Fieldwork dates: August 24 – September 9, 2019
• 2,004 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
• 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
  • 30% of all interviews were checked by controllers
• All 2,004 interviews were conducted using tablets
• 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.

![Margin of Error Example](image)
Survey Methodology for Previous waves

- **December 2015**
  - 6,396 completed interviews
  - Eight oversamples: Kyiv city, Raions of the North East Border in Sumi and Kharkiv Oblasts, Kharkiv city, Mariupol city, Kherson Oblast, Odesa city, the Ismail region of Southern Odesa Oblast, Lviv

- **May 2016**
  - Fieldwork dates: May 21 – June 15, 2016
  - 6,378 completed interviews
  - Eight oversamples: Kyiv city, Raions of the North East Border in Sumi and Kharkiv Oblasts, Kharkiv city, Mariupol city, Kherson Oblast, Odesa city, The Ismail region of Southern Odesa Oblast, Lviv

- **December 2016**
  - Fieldwork dates: November 9 - December 16, 2016
  - 6,342 completed interviews
  - Eight oversamples: Kyiv city, Raions of the North East Border in Sumi and Kharkiv Oblasts, Kharkiv city, Mariupol city, Kherson Oblast, Odesa city, The Izmail region of Southern Odesa Oblast, Lviv, Khmelnytska Oblast

- **July 2017**
  - Fieldwork dates: July 1 - 31, 2017
  - 5,125 completed interviews
  - Six oversamples: Kyiv city, Kharkiv city, Khersonska Oblast, Odesa city, Lviv city, Kramatorsk Region

- **December 2017**
  - 7,200 completed interviews
  - Oversample: Kramatorsk Region - cities of Kramatorsk and Slovyansk and surrounding rural areas

- **July 2018**
  - Fieldwork dates: July 3 – July 31, 2018
  - 5,784 completed interviews
  - Seven oversamples: Kyiv city, Kharkiv city, Kramatorsk Region - cities of Kramatorsk and Slovyansk and surrounding rural areas, Kherson Oblast, Odesa city, Lviv city, Ternopil Oblast

- **December 2018**
  - Fieldwork dates: December 5, 2018 – January 9, 2019
  - 5,238 completed interviews
  - Six oversamples: Kyiv city, Kharkiv city, Kramatorsk Region - cities of Kramatorsk and Slovyansk and surrounding rural areas, Kherson Oblast, Odesa city, Lviv city

- **May 2019**
  - Fieldwork dates: May 14 - 29, 2019
  - 2,502 completed interviews
  - National samples with macro regions (Center/North, East, South, West)
Tracking Poll and Panel Methodology

• **Pre-election tracking poll**
  • Fieldwork dates: June 18 - July 20, 2019.
  • Sample size: ~ 100 respondents every day. Daily results include responses from 4 previous days (~400 people).
  • Respondents were recruited randomly with post-stratification weighting by age and settlement size. Sample is representative of Info Sapiens’ online panel.

• **Post-election panel poll**
  • Fieldwork dates: July 24 – August 8, 2019.
  • Participants of the tracking poll were re-surveyed after the E-day.
  • Response rate: 80.7%; Total sample size: 2646.