OPPORTUNITIES AND CHALLENGES FACING UKRAINE’S DEMOCRATIC TRANSITION

Nationwide Telephone Survey
November 14 - 22, 2023

This research is funded by the United States Agency for International Development (USAID), Sweden, UK Aid and Global Affairs Canada.

Survey fieldwork was conducted by Kyiv International Institute of Sociology.
Main Findings

● Ukraine remains unified across regions on majority of questions – regional divisions are much less prominent.

● Surge in overall optimism post-full scale invasion remains.
  ○ However, fewer respondents are “very optimistic” about the future; war is expected to last longer than previous waves.

● Trust in many public officials and institutions has declined.

● Overwhelming majority of Ukrainians think it is important that Ukraine becomes a fully-functioning democracy, and desire EU and NATO accession.

● Ukrainians are not only politically aligned with EU and NATO, but also in terms of democratic values – support for gender equality and LGBTQ+ rights continue to increase.
Main Findings (contd.)

- Ukrainians fully support their military (trust in AFU remains high).
- Increased number of Ukrainians are open to peace negotiations (up to 42%), but still reject major concessions.
- Corruption, waning international support, internal societal divisions and disinformation are seen as the greatest threats to the country, after Russian military aggression.
- Ukrainians agree that elections should only be held after the war ends, with opportunities for out-of-country voting.
- There is an ongoing shift in how Ukrainians consume news about the war, away from traditional media and toward social media, particularly Telegram and YouTube.
Fieldwork dates:
November 14 – 22, 2023
2,516 completed interviews
GENERAL CONTEXT
How much longer do you expect the war to continue? (q5)

<table>
<thead>
<tr>
<th>Duration</th>
<th>May 2022</th>
<th>August 2022</th>
<th>January 2023</th>
<th>May 2023</th>
<th>November 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than three months</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1-2 months</td>
<td>9</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2-3 months</td>
<td>8</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3-6 months</td>
<td>17</td>
<td>16</td>
<td>16</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6-12 months</td>
<td>11</td>
<td>15</td>
<td>15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>More than 12 months</td>
<td>11</td>
<td>15</td>
<td>15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DK</td>
<td>38</td>
<td>37</td>
<td>30</td>
<td>33</td>
<td></td>
</tr>
</tbody>
</table>

November 2023:
- Between 1 and 2 years - 25%
- Between 2 and 5 years - 14%
- More than 5 years - 4%

The interviewers did not read out the options.

*The wording of the question has changed since May 2022. In May 2022, the question was: “How long do you expect the war to continue?”*
Let’s talk about the ways this war affected you. Have you faced any of the following? (q6 x Historic) “Yes” only

- Deterioration of mental health
- Income reduction
- Deterioration of physical health
- Loss of friends and family
- Separation from family
- Loss of job
- Loss of other property
- Loss of home
Let’s talk about the ways this war affected you. Have you faced any of the following? (q6 X Sex) “Yes” only

Respondents 55+ more often report deterioration of physical health.

Middle aged and young respondents report income reduction, loss of friends and family, and loss of job more often than the older respondents.
For the last three months, have you or anyone in your family gone without…? (q45)

*Part 1*

<table>
<thead>
<tr>
<th>Service</th>
<th>All the time</th>
<th>Many times</th>
<th>Occasionally</th>
<th>Never</th>
<th>DK</th>
<th>RA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electricity for the home</td>
<td>12</td>
<td>29</td>
<td>68</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internet connection</td>
<td>3</td>
<td>24</td>
<td>70</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Means of communication</td>
<td>1</td>
<td>19</td>
<td>79</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Heating at home</td>
<td>3</td>
<td>15</td>
<td>79</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Water supply</td>
<td>2</td>
<td>16</td>
<td>79</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gas supply</td>
<td>4</td>
<td>7</td>
<td>87</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Drinking water</td>
<td>1</td>
<td>7</td>
<td>90</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
For the last three months, have you or anyone in your family gone without…? (q45)

Part 2

- **Sleep**: 8% all the time, 14% many times, 34% occasionally, 43% never, 43% DK, 43% RA
- **Money**: 6% all the time, 8% many times, 33% occasionally, 52% never, 52% DK, 52% RA
- **Medical treatment**: 3% all the time, 8% many times, 18% occasionally, 75% never, 75% DK, 75% RA
- **Salary payments**: 6% all the time, 12% many times, 75% occasionally, 5% never, 5% DK, 5% RA
- **Warm clothes or footwear**: 1% all the time, 11% many times, 86% occasionally, 1% never, 1% DK, 1% RA
- **Food**: 1% all the time, 8% many times, 91% occasionally, 1% never, 1% DK, 1% RA
- **Hygiene items**: 1% all the time, 7% many times, 91% occasionally, 1% never, 1% DK, 1% RA
- **Food for babies**: 4% all the time, 93% many times, 83% occasionally, 8% never, 8% DK, 8% RA
- **Pension benefits**: 3% all the time, 13% many times, 88% occasionally, 5% never, 5% DK, 5% RA
For the last three months, have you or anyone in your family gone without…? (q45 X q42/43)

*Salary and pension benefits only*

<table>
<thead>
<tr>
<th>Category</th>
<th>All the time</th>
<th>Many times</th>
<th>Occasionally</th>
<th>Never</th>
<th>DK</th>
<th>RA</th>
</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>6</td>
<td>12</td>
<td>75</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public Sector Employees</td>
<td>10</td>
<td>15</td>
<td>84</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retired</td>
<td>10</td>
<td>1</td>
<td>97</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Do you feel the following are either a big threat, some threat or no threat at all to your way of life? (q8)

- **Russian military aggression**: 90% big threat, 7% some threat, 21% no threat at all
- **Corruption**: 80% big threat, 15% some threat, 4% no threat at all
- **Decrease in international support**: 57% big threat, 30% some threat, 10% no threat at all
- **Internal societal divisions**: 56% big threat, 28% some threat, 13% no threat at all
- **Russian disinformation or propaganda**: 55% big threat, 22% some threat, 21% no threat at all
- **Economic uncertainty**: 47% big threat, 42% some threat, 17% no threat at all
- **War fatigue among Ukrainians**: 44% big threat, 43% some threat, 10% no threat at all
- **Political uncertainty**: 37% big threat, 39% some threat, 15% no threat at all
- **Climate change**: 24% big threat, 42% some threat, 31% no threat at all
- **Moving closer to the West (EU and NATO)**: 3% big threat, 11% some threat, 82% no threat at all
In general, are you optimistic or pessimistic about Ukraine’s future? (q7 X Settlement) “Very optimistic/More optimistic than pessimistic” only

In December 2021, the percentage of “Very optimistic/More optimistic than pessimistic” respondents was 39%.
In general, are you optimistic or pessimistic about Ukraine’s future? (q7)

There are slightly more “very optimistic” respondents (40%) among the oldest age group and less (21%) among the youngest group.
How important is it to you that Ukraine becomes a functioning democracy? (q10 X Settlement) “Very important/important” only

National – 93%

West 97%
Center/North 92%
East 91%
South 91%

In May 2023, the national response was 94%, in December 2021 – 76%.
There are many characteristics of a fully functioning democracy. Of the list, which three do you think are most important? (q9)

Select up to three
In your opinion, who is/should be more involved in political life, men or women? (q11/q12)

- Mostly men: 15 (Current Situation), 6 (Actual Preferences)
- Men significantly more than women: 21 (Current Situation), 7 (Actual Preferences)
- Men slightly more than women: 21 (Current Situation), 9 (Actual Preferences)
- Men and women equally: 38 (Current Situation), 65 (Actual Preferences)
- Women slightly more than men: 13 (Current Situation), 5 (Actual Preferences)
- Women significantly more than men: 1 (Current Situation), 4 (Actual Preferences)
- Mostly women: 1 (Current Situation), 2 (Actual Preferences)
- DK: 1 (Current Situation), 3 (Actual Preferences)

79% of Ukrainians want to see a better balance between men and women in political life.

In January 2023, this rate was 74%.

There are no statistically significant differences in responses between men and women.
As of February 2022, the proportion of women in the Ukrainian army was around 17% making it one of the most balanced in the world in terms of the participation of men and women. Since then, both the number of women in the Ukrainian military and the spectrum of roles they serve continue to grow – including women that are serving on the front line.
Continuing on the topic of women’s involvement in the military, to what extent do you agree or disagree with the following statements (q14/15)

1. This demonstrates the changing role of women in the Ukrainian society
   - Strongly agree: 26
   - Somewhat agree: 34
   - Neither agree nor disagree: 14
   - Somewhat disagree: 15
   - Strongly disagree: 7
   - DK: 4

2. This enhances Ukraine’s military capabilities and contributes to its future victory
   - Strongly agree: 35
   - Somewhat agree: 32
   - Neither agree nor disagree: 13
   - Somewhat disagree: 12
   - Strongly disagree: 5
   - DK: 2

3. Women should have the same opportunities as men to pursue a career in the military if they wish to do so.
   - Strongly agree: 60
   - Somewhat agree: 27
   - Neither agree nor disagree: 14
   - Somewhat disagree: 5
   - Strongly disagree: 3
   - DK: 1

Women and older respondents tend to agree more with the statement on changing role of women.

Older respondents also agree with the statement of military capabilities slightly more.
Please tell me to what extent, if at all, you agree or disagree with the following statements? (q16)

- LGBT+ people should be protected from discrimination
- LGBT+ people should have the same rights as others
- LGBT+ people should have the right to civil partnership
- LGBT+ should have the right to marry
- LGBT+ couples should be able to adopt children just like heterosexual couples
Please tell me to what extent, if at all, you agree or disagree with the following statement: LGBT+ people should have the same rights as others (q16.1)
To what extent do you agree or disagree with the following statement: The Ukrainian government should prioritize the needs of persons with disabilities while planning the reconstruction and recovery process (q19)

- Strongly agree: 69
- Somewhat agree: 22
- Neither agree nor disagree: 4
- Somewhat disagree: 2
- Strongly disagree: 2
- DK: 1
GOVERNMENT PERFORMANCE AND TRUST
How would you rate President Zelenskyy’s performance since the start of the full-scale war on February 24, 2022? (q20)
How would you rate the performance of the following institutions since the start of full-scale war on February 24, 2022? (q20)

- **Very good**
- **Good**
- **Neither bad nor good**
- **Bad**
- **Very bad**
- **DK**

### Institutions:
- **Parliament**
- **Government**
- **Your local government**
- **Your local military administration**
To what extent, if at all, do you trust the following? (q21)

- The Armed Forces of Ukraine
- President Volodymyr Zelenskyy
- National police
- Your local military administration
- Your local government
- Prime Minister of Ukraine Denys Shmyhal
- Central Election Commission (CEC)
- National Anti-Corruption Bureau of Ukraine
- The National Government
- Speaker of Verkhovna Rada, Ruslan Stefanchuk
- National Agency on Corruption Prevention
- Parliament
- Prosecutor General Office
- Courts
- Political parties
Where do you get information about the war and current events? (q22)
Select all that apply

- Social media and messaging apps: 68
- Television: 48
- Websites: 38
- Friends and family: 32
- Radio: 19
- Print: 2
- I don’t get information about politics and current events: 1
- Other: 1
How often do you engage with the following social media and messaging apps? Do you get information about the war and current events from …? (q23 x 24)

If “social media and messaging apps” is selected in Q22

Among those who use the platform daily

<table>
<thead>
<tr>
<th>Platform</th>
<th>0</th>
<th>10</th>
<th>20</th>
<th>30</th>
<th>40</th>
<th>50</th>
<th>60</th>
<th>70</th>
<th>80</th>
<th>90</th>
<th>100</th>
<th>Daily Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telegram</td>
<td>94</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>70%</td>
</tr>
<tr>
<td>Viber</td>
<td>45</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>68%</td>
</tr>
<tr>
<td>YouTube</td>
<td>86</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>66%</td>
</tr>
<tr>
<td>Facebook</td>
<td>68</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>54%</td>
</tr>
<tr>
<td>Instagram</td>
<td>56</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>36%</td>
</tr>
<tr>
<td>TikTok</td>
<td>74</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>29%</td>
</tr>
<tr>
<td>X (Twitter)</td>
<td>65</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>6%</td>
</tr>
<tr>
<td>Vkontakte</td>
<td>36</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2%</td>
</tr>
<tr>
<td>Odnoklassniki</td>
<td>16</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1%</td>
</tr>
</tbody>
</table>
INTERNATIONAL RELATIONS AND WAR
To what extent would you accept each of the following as the price for peace? (q25)

- **Ukraine reclaims the territory it controlled prior to 2014 that includes all of Donbas and Crimea**
  - Fully unacceptable: 4%
  - Somewhat unacceptable: 13%
  - Somewhat acceptable: 75%
  - Fully acceptable: 2%

- **Ukraine reclaims the territory it controlled prior to 2022 without Crimea and certain areas of Donetsk and Luhansk oblast**
  - Fully unacceptable: 52%
  - Somewhat unacceptable: 21%
  - Somewhat acceptable: 16%
  - Fully acceptable: 7%

- **Ukraine claims only the territory it currently controls**
  - Fully unacceptable: 71%
  - Somewhat unacceptable: 13%
  - Somewhat acceptable: 7%
  - Fully acceptable: 3%

- **Ukraine renounces its declared goal to join NATO**
  - Fully unacceptable: 55%
  - Somewhat unacceptable: 21%
  - Somewhat acceptable: 12%
  - Fully acceptable: 7%

- **Ukraine renounces its declared goal to join EU**
  - Fully unacceptable: 56%
  - Somewhat unacceptable: 22%
  - Somewhat acceptable: 11%
  - Fully acceptable: 6%
Do you think that Ukraine should engage in negotiations with Russia to try to achieve peace? (q26)
By 2030, do you want/expect Ukraine to be… (q27/q28)

- **A member state of the EU**
  - Want: 90, 92, 92, 92, 91
  - Expect: 87, 85, 86, 89, 83

- **A member state of NATO**
  - Want: 73, 79, 86, 89, 89
  - Expect: 65, 69, 80, 85, 81
When do you think Ukraine will become a member state of the EU? (q29)

Among those who expect Ukraine to be a member state of the EU by 2030

- In less than a year: May 2022 (28), August 2022 (11), January 2023 (10), May 2023 (8)
- In a year or two: May 2022 (35), August 2022 (26), January 2023 (31), May 2023 (23)
- Between 2 and 5 years: May 2022 (35), August 2022 (36), January 2023 (39), May 2023 (41)
- More than 5 years: May 2022 (7), August 2022 (20), January 2023 (13), May 2023 (21)
- DK: May 2022 (8), August 2022 (8), January 2023 (9), May 2023 (6), November 2023 (7)
When do you think Ukraine will become a member state of NATO? (q30)

Among those who expect Ukraine to be a member state of NATO by 2030

- In less than a year: 6
- In a year or two: 23
- Between 2 and 5 years: 43
- More than 5 years: 19
- DK: 8
POLITICS
There are conversations about how and when elections should take place in the context of the full-scale war. In your opinion, when should the government hold elections? (q33)
If the current wartime environment continues, when would you prefer to have the next Presidential elections… (q34)

- In March 2024: 9
- In October 2024: 4
- In March 2025: 3
- Only after the war ends: 80
- DK: 3
METHODOLOGY
Regular Telephone Survey Methodology

Fieldwork dates: November, 14-22, 2023

2,516 completed interviews

The nationally representative sample was random:
- One-staged sample based on random generation of mobile phone numbers
- No additional quota or strata was used

The temporarily occupied territories before February 23, 2022 (Autonomous Republic of Crimea, city of Sevastopol, and occupied regions of Donetsk and Luhansk oblasts) were excluded from the sample. Respondents residing in the territories that were occupied after February 24, 2022 were interviewed (if they felt safe to answer the questions).

Quality control

- All interviewers received a two-level training system
- Independent controllers conducted quality control interviews
- 30% of all interviews were checked by controllers
- All 2,516 interviews were conducted via telephone using CATI (Computer-Assisted Telephone Interview) software

The margin of error for national sample is 2.2%

- 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 on the right:
  - A is statistically greater than B and C
  - There is no statistical difference between B and C