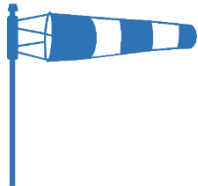


## MAIN RESULTS OF THE RESEARCH



### GENERAL WELL-BEING OF THE POPULATION OF UKRAINE

- **The population's well-being is rather restrained and optimistic.** Although other polls show that 9 out of 10 Ukrainians have an optimistic view of the future of Ukraine, but if you ask about the situation now, then **40% believe that the situation in Ukraine is improving, and another 29% choose a more "restricted" option "in some ways it is improving, in some ways it is getting worse"** (believe that it is getting worse - 22%).
- In addition, if we talk about self-assessment of adaptation to current realities, then **34% consider themselves rather or completely adapted, and another 45% assess their adaptability as "average"** (believe that they have rather or not adapted at all 17%).
- There is a correlation between the answers to these two questions. If you put them together, 49% of respondents will be in the segment of rather optimistic feeling of well-being against 24% in the segment of rather pessimistic feeling of well-being.



### DEMOCRACY, RIGHTS AND FREEDOMS OF CITIZENS IN THE CONDITIONS OF WAR

- According to the results of other KMIS polls, for 94% of Ukrainians, it is important for Ukraine to become a "fully functioning democracy." However, **if to determine what is a higher priority, more respondents prefer the idea of a strong state / strong leadership than democracy in the region.** There are also reasons to believe that the demand for a "strong hand" is growing against the background of the war.
- 58% believe that a strong leader is more important for Ukraine now (that a democratic system is more important - 27%). There is an even greater consensus regarding the expediency of the President interfering in the activities of the Parliament and the Government - 79% consider it justified to strengthen defense (16% believe that it is important to maintain the separation of powers even during war). 62% believe that during the war even constructive criticism is unacceptable (in contrast, 32% believe that political competition should be maintained even now).
- Only in the case of breaking laws, 48% believe that the government may be able to break laws for victory, while 41% believe that under no circumstances should laws be broken.

- These statements can be summed up in a single index "Strong state / strong leadership vs. democratic system and pluralism". **64% of respondents fall into the segment of those who prefer a strong state to leadership. Only 16% of respondents prioritize democracy and pluralism.** The remaining 20% received an intermediate score, indicating either uncertainty or conflicting views. Among all categories of the population, attachment to a strong state / leadership prevails.
- At the same time, support for a "strong hand" or "democracy" is not related to what the respondents consider to be a higher priority - the interests of the state or the rights and interests of citizens. In general, among all respondents, 48% believe that now the rights and interests of citizens should be considered first, even if they may differ from the interests of the state. 40% of respondents favor the priority of state interests. Even among those who give priority to a strong state / strong leadership, 47% believe that the rights and interests of citizens should be taken into account first. Conversely, among those who give priority to democracy and pluralism, 40% support the opinion that state interests are more important at this time.
- **Two more questions (two pairs) of statements describe the attitude to the security of the state vs. compliance with legal procedures. In this case, there is no consensus in society, and opinions are divided.** 57% of respondents believe that during the war, the authorities should hold citizens accountable for "harmful" points of view for the state. Although less, but significant number (37%) instead believe that anyone should be able to publicly express their point of view without fear of persecution by the authorities. On the other hand, regarding the banning of the activities of politicians and parties suspected of cooperation with Russia, 47% believe that it should be banned at the first suspicion and even without legal evidence, and 46% believe that this can only be done if there is reliable legal evidence.
- **If the answers are combined into a single index, then 44% of respondents fall into the segment of those who still prefer state security, while 29% fall into the segment of those who prefer compliance with legal procedures.** The remaining 27% have either uncertain or conflicting views.
- If to talk about the expediency of elections after the end of martial law, then for 52% this issue is less of a priority and therefore they believe that after martial law it will be necessary to focus on other issues. At the same time, 40% believe that it is important to hold free and fair elections on time. At the same time, even among respondents who prefer democracy and pluralism, 43% consider the issue of elections after martial law to be a less priority issue. At the same time, among supporters of a strong state / strong leadership, 39% insist on timely elections. That is, the question of conducting elections in the minds of citizens is weakly connected with their attitudes regarding the "strong hand" or the priority of "democratic governance".



## CRIMINAL LIABILITY FOR COOPERATION WITH THE OCCUPATION AUTHORITY

- Among the various categories of the population in the occupied territory, there is a certain consensus only regarding the persons who have assumed leadership positions and regarding the doctors, whether they should be held criminally responsible after the deoccupation for cooperation with the occupiers. In the first case, **69% of respondents believe that those who assumed leadership positions in the occupation administration should be held criminally responsible. In the case of doctors, 66% do not believe that they should be prosecuted.**
- Regarding other categories, the situation is less clear-cut. The demand to punish such categories of citizens prevails (albeit with a significant part of those who are against punishment), such as local businessmen, those who received a Russian passport, teachers (49-52% support criminal liability, and 36-41% do not). At the same time, the prevailing opinion is against prosecuting pensioners who have applied for Russian social benefits and employees of critical infrastructure who receive salaries from the occupation administration (33-37% support punishment, do not support – 51-55%).
- At the same time, the obtained results leave the impression of a significant contextual reaction, and this context after deoccupation can be actively used. For example, regarding teachers, the wording included a positive aspect ("teachers continue to teach children") and a negative aspect ("according to Russian programs"). If the context was only negative (we focused on working on Russian programs), we would have received higher support for the punishment. Conversely, if the emphasis was on continuing the education of children, then fewer people would demand punishment. Therefore, to a large extent, the question is which narrative will be used as a result (this applies both to teachers and other categories).



## MEDIA CONSUMPTION AMONG THE POPULATION OF UKRAINE

- The main leitmotif that permeates both the telephone survey and the diary research (and on which other aspects are "strung") is the "great migration" online in search of news. Currently, TV still holds a significant position (especially among older people), but it is definitely not dominance (which it held until February 24, 2022). In fact, online channels of information (especially Telegram and YouTube) dominate, and in fact we are witnessing a radical transformation of the media landscape, where hundreds of online sources have "grown" instead of a few powerful television channels, each of which cannot boast of a large share of the "market". Moreover, despite the criticism of online channels for sending fakes and disinformation, the population has a fairly high level of trust in information and sees a number of advantages for themselves. And although the situation looks quite chaotic so far (given the huge number of different Telegram and YouTube channels, pages, bloggers, etc.), perhaps the media field will gradually be structured. In addition, it raises other questions about whether it is

**appropriate to continue to maintain expensive channels (as a certain "political" asset) if there are much cheaper ways through online.**

- So, according to the results of a telephone survey, 59% of respondents include social networks among the top 2 sources (and in general, 69% received information from them in the last 7 days). For comparison, 43% count among the top 2 sources the telethon "Yedyni Novyny" (57% watched in general). This is followed by communication with relatives/acquaintances (respectively, 25% and 51%), news websites (25% and 39%), other than telethon television (19% and 33%). 8% of respondents consider radio to be in the top 2 in terms of importance, and generally received information from it 24%.
- According to the results of the diary research, 48% of the time spent on news falls on social networks, 34% on television (another 11% - on news sites).
- Among users of social networks, 39% are subscribed to the official pages / channels of the authorities (the largest - half - to the President).
- Among social networks, **most respondents use Telegram: 39% consider this network among the top 2 most used, and in the last 7 days a total of 44% of all respondents used it.** Next come Facebook and YouTube, which are counted by 24-26% of respondents as their top 2 networks, and in general, 36% received information from them in the last week. In addition, 20% count Viber among the top 2 networks (general use for receiving news – 31%). Other social networks were less often mentioned by respondents (in particular, only 3% used one of the Russian social networks in the last week).
- Diary research also shows that the top three social networks are Telegram, YouTube, and Facebook. Simultaneously, **if to analyze the total time of news consumption in social networks (and take them as 100%), then 41% of the total time is spent on Telegram, 37% on YouTube, and on Facebook – 12%** (Viber accounts for another 6%, and all other networks together account for 3%).
- The "requirements" for types of content on the Internet are also relevant: among those who receive information on the Internet, 62% prefer short videos and 61% - short informative messages. According to the diary research, the majority prefer videos up to 15 minutes.
- Preference for short messages and videos correlates with the results of a diary research on switching to Telegram for news. In the diary research, in the descriptions of changes in news search and use of various platforms/sources of information after the war was very common. Research participants explain this by the need to quickly receive current operational news, in a convenient way (for example, via the phone), being away from home (for example, in warehouses), as well as the concise format of presenting news in a rapidly changing situation.
- **At the same time, age remains a significant differentiating factor in the field of media consumption.** If among 18-29-year-olds 87% include social networks in their top 2 sources of information, and "Yedyni Novyny" - 28%, then among 60+ year-olds 34% talk about social networks, and 61% - about "Yedyni Novyny". A similar trend is taking place with regard to news sites, as well as other television. At

the same time, online "loses" so far only among 60+ year olds. In addition, a significant involvement in online determines the fact that if among young people 54% are subscribed to official pages / channels, then this indicator decreases with age to only 6% among people aged 60+.

- It is also appropriate to pay attention to the role of Telegram channels among younger respondents: among 18-29-year-olds, 76% count them among the top 2 social networks for themselves (in addition, the indicator among 30-44-year-olds is 52%).
- Among the various sources of information, the telethon "Yedyni Novyny" is the most trusted (rated 7-10 points on a scale, where 10 points means "completely trust") by 57% of respondents. At the same time, do not trust (rating 0-3 points) - only 6%. No more than a third of respondents trust other sources of information from the list, although the level of distrust in all cases is relatively low (6-13% do not trust). In the conditional rating of trust, "Yedyni Novyny" is followed by Telegram channels (35% trust and 6% do not trust, and the rest of the respondents rated their trust as "average" or could not decide on an answer), other television (33% against 11%), news websites 27% vs. 8%) and YouTube channels (25% vs. 10%). In the case of Viber, the ratio of 20% trust to 13% distrust, in the case of Facebook - 20% against 12%.
- If to analyze the level of trust among those who use and do not use a certain source, then the leaders in terms of trust among users with this approach are the telethon "Yedyni Novyny" (72% of those who watched it in the last 7 days trust the information, and do not trust – 3%) and Telegram channels (58% against 2%). This is followed by other television (47% against 6%). It is worth noting that trust in the information of the telethon "Yedyni Novyny" is quite significant even among those who have not watched it in the last 7 days - 37% (with 11% of those who do not trust). At the same time, even among those who receive information from news websites / YouTube channels / Facebook / Viber, 36-39% trust these sources, 4-10 do not trust them%.
- Both according to the results of a telephone survey and the results of a diary research, mostly no more than 3-5% of users belong to individual channels (that is, there are many of them and the audience is very dispersed). A similar situation in the case of YouTube channels (no more than 4-7%). Greater structure is preserved in the case of TV channels.
- The main goal for all types of sources according to the results of the diary research is to receive news about the situation in the country (72-82%, depending on the source, indicated this goal for top sources). 82-90% of users of individual sources characterize them as "informational". No more than 5% mention other characteristics such as "entertaining" etc.
- The average ratings of news materials according to the basic criteria of content and form of presentation (timeliness, truthfulness, objectivity, uniqueness) vary in a narrow range from 4.2 to 4.4 (on a scale of 1-5 points), which is evidence of a fairly high quality of news (in the sense respondents).
- While news consumption on television is largely partial, news consumption on the Internet is more systemic. This is evidenced by the fact that 54% of respondents have one or more favorite news sites

where they view all the news every day, and another third of respondents (33%) regularly view the main news.

- For the respondents of the diary research, the priority is now comprehensive, truthful, "unadorned", information about important events, which is presented quickly and accurately covers the facts. At the same time, attachment to presenters or journalists is less important. There is no particular interest in emotional relief and receiving reassuring information.
- In general, according to individual views and priorities regarding media consumption, the respondents of the diary research are divided into "seekers of media that are authoritative in their own eyes", "seekers of confirmation of their own opinion", "seekers of truthful media, the truth is more important than anything" and "moderate seekers of truthful mass media, even unpleasant ones".
- **To an open question in a telephone survey about "opinion leaders", 29% named V. Zelenskyi, 14% - O. Arestovych, 12% - O. Zhdanov** (in the diary research, the same three persons were named as the most influential). Other top "opinion leaders": V. Zaluzhnyi (9%), S. Prytula (9%), V. Kim (4%), M. Podoliak (4%), O. Reznikov (3%), D. Hordon (3%), Yu. Butusov (3%). At the same time, 44% of respondents "spontaneously" could not name any specific surname.
- **13% of respondents to a telephone survey received information from some Russian resource in the last 7 days.** Of them, 3% watched Russian TV channels, 11% - from one or another online source. **89% explained this by the fact that they wanted to know the point of view of Russians / how they are given information.** Only 2% answered that they visited Russian resources because of doubts about Ukrainian sources. However, it can be assumed that some of the respondents hide their true motivation.
- According to the results of a diary research conducted before starting diaries, 27% of respondents indicated that they used Russian media for news during the last month. At the same time, according to the coding results of media consumption during the week, 4% were Russian or pro-Russian channels.
- Among those who received information from Russian resources in the last 7 days, 77% believe that the state and society should take measures against pro-Russian mass media (and only 16% see this as a political massacre). In addition, 57% claim that, in general, the Ukrainian media is enough for them to have a comprehensive view of the situation (although 36% believe that the Russian media is important as an "alternative point of view for balance").



## PERCEPTION OF INFORMATION SPACE AND INFORMATION POLICY IN UKRAINE

- Respondents have rather colorful and largely uncrystallized and contradictory views on the role of the state in the media sphere. There is quite a noticeable demand for a tougher line (the Russian / pro-Russian media are a special case in point) and an active role of the state (which contrasts with the period before February 2022, when a significant part, if not the majority, was critical of various restrictions). At the same time, a significant part maintains expectations from the mass media of activities

**critical of the authorities, as well as against censoring certain information.**

- The majority of Ukrainians want greater state control over information on the Internet (60%, 30% do not share this opinion) and also approve of the "Yedyni Novyny" telethon as a method of forming a common opinion (65%, do not share this opinion - 17%). At the same time, the majority (60%) also want the mass media to have the opportunity to reasonably criticize the actions of the government (32% are in favor of supporting the government's line).
- **If we combine the answers into a single index, then 45% of the respondents will be in the segment that rather supports state regulation in the field of media. 21%, on the contrary, rather emphasize the importance of pluralism in the media. The remaining 34% have an uncertain or conflicting opinion on this issue.**
- **Attitudes towards state regulation are quite closely related to views on the "strong hand".** Among respondents who give priority to democracy, 56% also give priority to pluralism in the media and only 15% share views on active state regulation. On the other hand, among those who prioritize a strong state/leadership, 54% support state regulation and 13% support pluralism in the media. It is important that the segment of respondents who have intermediate assessments regarding a strong state vs. democracy, according to their views on regulation in the media, are much closer to supporters of the "strong hand".
- The absolute majority of respondents are critical of both the pro-Russian media in Ukraine (73% believe that measures should be taken against them, while only 13% consider it a political massacre) and the Russian media themselves (only 16% believe that Russian media provide an alternative view for balance, while 77% believe that information from Ukrainian media is sufficient for the full picture).
- **In the composite index, 78% of respondents fall into the segment of critical attitude towards Russian / pro-Russian mass media (only 8% in the segment of neutral / positive attitude). It is important to note that polls until February 2022 indicated a significant lack of acceptance of a number of restrictions in the media sphere, and now there is actually a public consensus. Moreover, this consensus can be traced among all categories, and a critical attitude towards Russian and pro-Russian mass media also occurs among residents of the South / East, as well as among Russian-speaking citizens.**
- **Many Ukrainians are quite skeptical about their orientation in the information field.** Thus, 40% claim that due to the large number of sources it is difficult for them to determine where the truth is (at the same time, 52% are sure that they can determine one or several true sources). **More than half (56%) entrust the state with responsibility for the fight against fakes and disinformation (on the citizens themselves – 35%).**
- Opinions also differed to a large extent on limiting access to certain information: **57% believe that mass media should honestly and fully convey information to the public**, while 40% believe that not all information should be made public.



## DIGITAL TECHNOLOGIES IN THE LIFE OF THE POPULATION

- 88% of respondents use the Internet, including **79% of respondents use the Internet every day or almost every day.**
- The majority in all categories use the Internet, although there is a noticeable differentiation by age. **If among young people (up to 30 years) 100% are daily users, then the indicator decreases to 53% among respondents aged 60+.**
- 75% of respondents have a smartphone. Younger respondents are more likely to own smartphones – the indicator drops from 96% among those under the age of 30 to 49% among those aged 60+.
- **78% among all respondents used messengers for communication in the last 7 days.** On average, those who use messengers use 2-3 different messengers. The use of messengers is widespread among all categories of the population, but there is still a differentiation by age: among respondents under 30 years old, 97% used messengers, and then the indicator decreases to 53% among respondents aged 60+.
- **The undisputed leader among Ukrainian messengers is Viber, which is included in the top 2 messengers most important to them by 58% among all respondents, and a total of 66% have used it in the last 7 days.** This is followed by Telegram (32% and 41%, respectively) and Facebook Messenger (20% and 34%). Other messengers are less popular among the country's population.