



MEDIA CONSUMPTION SURVEY IN UKRAINE 2018

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NATIONAL SURVEY

June 2018



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Goals and objectives of the study

- To define the attitude of the general public to the media
- To measure levels of satisfaction with regional, national and Russian media of all types
- To evaluate preferences regarding different media types
- To evaluate the consumption levels of different media
- To evaluate levels of trust in different media types
- The population's opinions on the competence of the media
- Assessment of the population's awareness and understanding of reforms through media coverage

RESEARCH DESIGN

Method

F2F

Target audience

Male/Female 18-65

Fieldwork

Wave 2015: May – June

Wave 2016: May – June

Wave 2017: May – June

Wave 2018: May – June

Sample size

Representative part ~ 1,640 interviews/wave

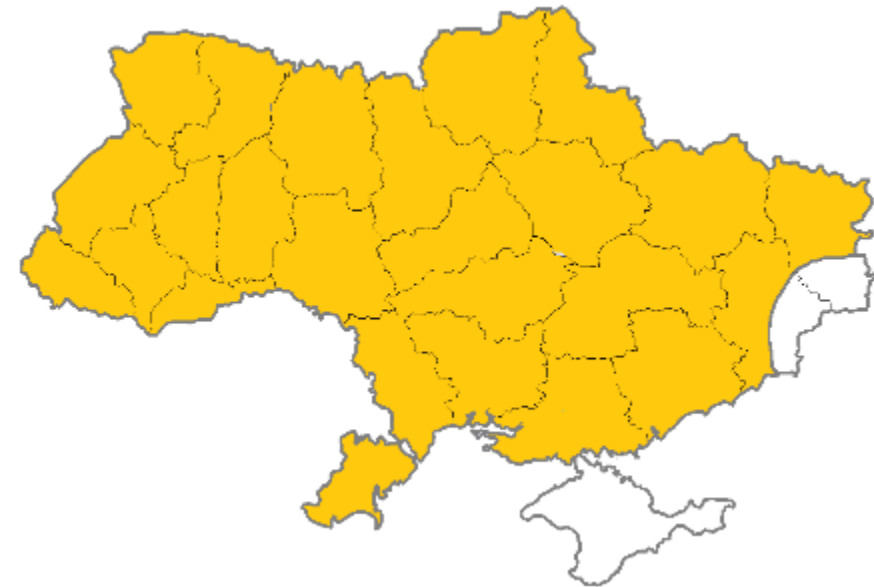
Total sample – 4,048 interviews/wave, of which

300 interviews in each of 12 regions: Kyiv, Vinnytsia, Dnipro, Donetsk, Zaporizhzhia, Lviv, Mykolayiv, Odesa, Poltava, Sumy, Kharkiv, Kherson

Geography

Ukraine, cities 50K+

Crimea and ATO area are excluded





Key Findings (1)

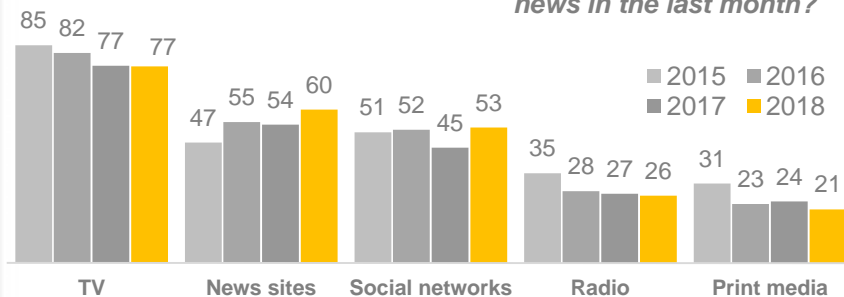
MEDIA CONSUMPTION

The TV audience share has not changed since the previous year. As before, TV remains the number one source of news for Ukrainians. The online media audience has grown significantly, the use of both news sites and social networks has increased.

Despite the ban on access to a number of Russian online resources and, consequently, a decrease in the number of users of the Russian social networks last year, digital media strengthened its position in the media. The print media audience continues to decrease.

As before, the popularity of TV among older viewers (46+) greatly contributes to its leading position in the media consumption totals. As usual, residents in the western regions comprise the largest TV audience among all regions of Ukraine. 1+1 and Inter remain the most popular TV channels in the country.

Which type of media have you used for news in the last month?



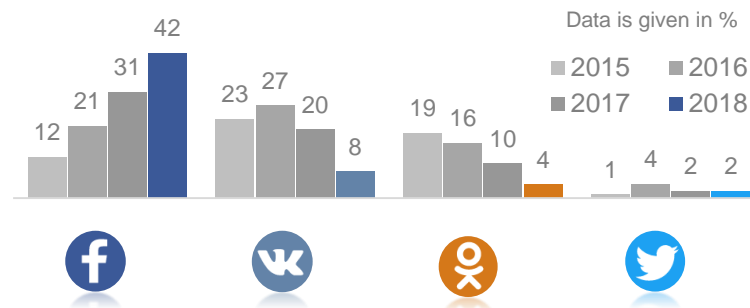
Data is given in %

Digital (internet) media remains the most popular news source among younger audiences, with internet users aged 18-45 years preferring news sites, and youth (up to 35 years old) – social networks.

As before, most consumers prefer news aggregators (like ukr.net) over other digital media outlets.

The social media consumption patterns keep changing – the Facebook audience is gradually growing, while the Russian social networks have lost their leading positions.

Which social network do you prefer to use for news?



TRUST TO MEDIA

The levels of trust in both national and regional media have increased in all media categories. This trend was observed in all regions of Ukraine. Public trust in Russian media remains low - in fact, levels of trust in Russian TV, radio and press continue to decrease year in and year out since 2014.

The main reasons for not trusting the media include unreliability of information and biased coverage of an issue (presentation of only one point of view).

*To what extent do you trust the ... news source?
(the percentage of respondents who trust or rather trust the news source)*

	2015	2016	2017	2018
Trust in national mass media				
TV	61%	58%	54%	61%
Online	47%	52%	48%	58%
Print	34%	31%	28%	39%
Radio	39%	36%	33%	33%
Trust in regional mass media				
TV	51%	52%	46%	56%
Online	40%	45%	42%	52%
Print	36%	33%	31%	34%
Radio	35%	32%	30%	35%
Trust in Russian mass media				
TV	4%	3%	6%	4%
Online	8%	7%	10%	10%
Print	3%	2%	6%	4%
Radio	3%	2%	6%	3%



Key Findings (2)

In all media categories, except print media, respondents prefer national media outlets to regional ones. However, the study recorded an increase in the numbers of regional TV viewers and Internet users.

TV AUDIENCE

Which TV channels have you preferred for news in the last month? (for TV viewers)

	2015	2016	2017	2018
TV Consumption				
National	99%	99%	99%	99%
Regional	43%	44%	39%	45%
Russian	12%	7%	5%	6%

National TV channels: In all oblasts of Ukraine, over 95% of TV viewers prefer national TV channels to regional ones.

Regional TV channels: The regional TV audience has increased, mainly in the eastern regions (Zaporizhzhia, Dnipropetrovsk, Kharkiv and Luhansk oblasts). Lviv (68%), Sumy (68%) and Zaporizhzhia (65%) oblasts became the leaders in regional media consumption.

Russian TV channels: As before, the survey shows the highest levels of the Russian TV consumption in the eastern and southern regions (8-10%).

DIGITAL MEDIA AUDIENCE

Which news sites have you visited in the last month? (for digital media users)

	2015	2016	2017	2018
Internet Consumption				
National	93%	91%	90%	92%
Regional	28%	31%	31%	42%
Russian	25%	14%	12%	14%

National online media: The survey reveals the lowest national online media consumption levels in the southern region – in Odesa (79%) and Mykolaiv (77%) oblasts.

Regional online media: Similar to TV consumption, growing consumption of regional online media was mainly recorded in eastern regions (Zaporizhzhia, Dnipropetrovsk, and Donetsk oblasts). The levels of the regional online media consumption also increased in Sumy and Lviv oblasts.

Russian online media: Russian online media are mainly popular among residents of Odesa (54%), Zaporizhzhia (27%) and Donetsk (26%) oblasts.

PRINT MEDIA AUDIENCE

Which print media outlets have you preferred for news in the last month? (for the print media audience)

	2015	2016	2017	2018
Print Media Consumption				
National	61%	55%	50%	58%
Regional	63%	70%	68%	69%
Russian	7%	3%	1%	3%

National print media: National print media consumption levels increased during the past year. The highest levels of the Ukrainian press consumption were seen in the northern oblasts (83%).

Regional print media: Regional print media is more popular than national print media. More than half of the print media audience in all regions of Ukraine prefers regional media.

Russian print media: low popularity.

RADIO AUDIENCE

Which radio stations have you preferred for news in the last month? (for the radio audience)

	2015	2016	2017	2018
Radio Consumption				
National	87%	90%	93%	92%
Regional	27%	28%	25%	27%
Russian	11%	4%	1%	5%

The radio audience prefers national stations to regional ones. However, regional radio stations are quite popular among listeners in Lviv (83%), Vinnytsia (60%), Odesa (52%) and Sumy (45%) oblasts. Russian radio consumption increased this past year but is still very low (5%).



Key Findings (3)

MEDIA LITERACY

Accuracy and reliability of information remain the main criteria for evaluating news.

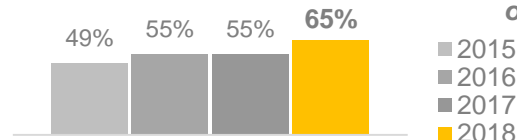
*What general requirements for news do you have?
(the most important)*

	2015	2016	2017	2018
Credibility / reliability	46%	43%	43%	44%
Objectivity	20%	22%	24%	19%
Timeliness	10%	12%	10%	15%
Completeness of coverage	8%	8%	9%	10%
Accuracy	8%	10%	8%	8%
Separation of facts and comments	6%	6%	5%	5%

Compared to previous years' findings, more people became aware of sponsored (*jeansa*) journalism in 2018 – awareness rose from 55% in 2017 to 65%. However, just over half of those who are aware of the existence of sponsored materials said they were able to distinguish real news from paid journalism.

The 2018 survey recorded an increase in the number of respondents using a critical eye when assessing news quality and accuracy. Most focused on news sources (28%) and the presence of a balance of views (29%). Meanwhile, a significant part of the audience still judges the accuracy of news coverage based on their own intuition or personal preferences (26%).

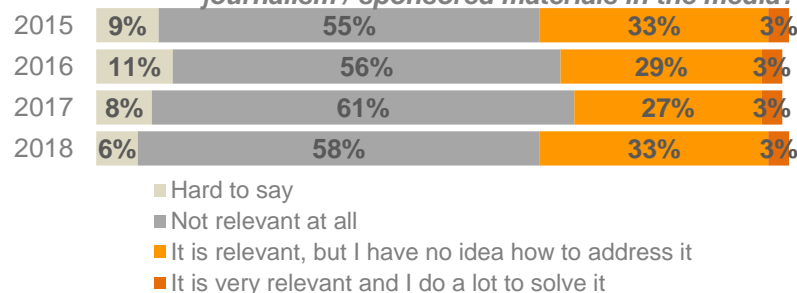
Do you know about sponsored / “special request” materials in the media, as well as hidden advertising presented in the form of ordinary messages?



Yes, I am

The continuing trend towards a decrease in the number of respondents who rate paid journalism as a deep-rooted problem in Ukrainian media has stabilized. The percentage of people who consider paid journalism an important issue, but have no idea how to solve it, has increased since last year. Residents of western regions demonstrated the highest level of awareness of this issue among all regions of Ukraine (44%).

In your opinion, how relevant is the problem of paid journalism / sponsored materials in the media?

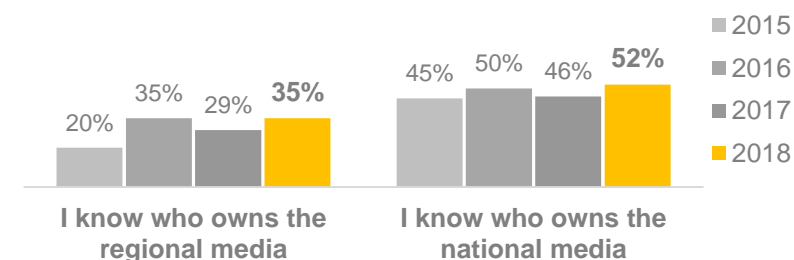


Survey respondents see TV as the main source of sponsored content.

Most respondents (65%) support the idea of banning political advertising on TV.

The percentage of respondents who are aware of who owns regional and national media outlets has increased since last year. As before, about a third of respondents believe that knowing who owns the media is important.

Do you know who owns or controls the ... media?



The survey found an increase in levels of public awareness of energy, healthcare and decentralization reforms. However, compared to the previous year's findings, fewer respondents were aware of land reform efforts.

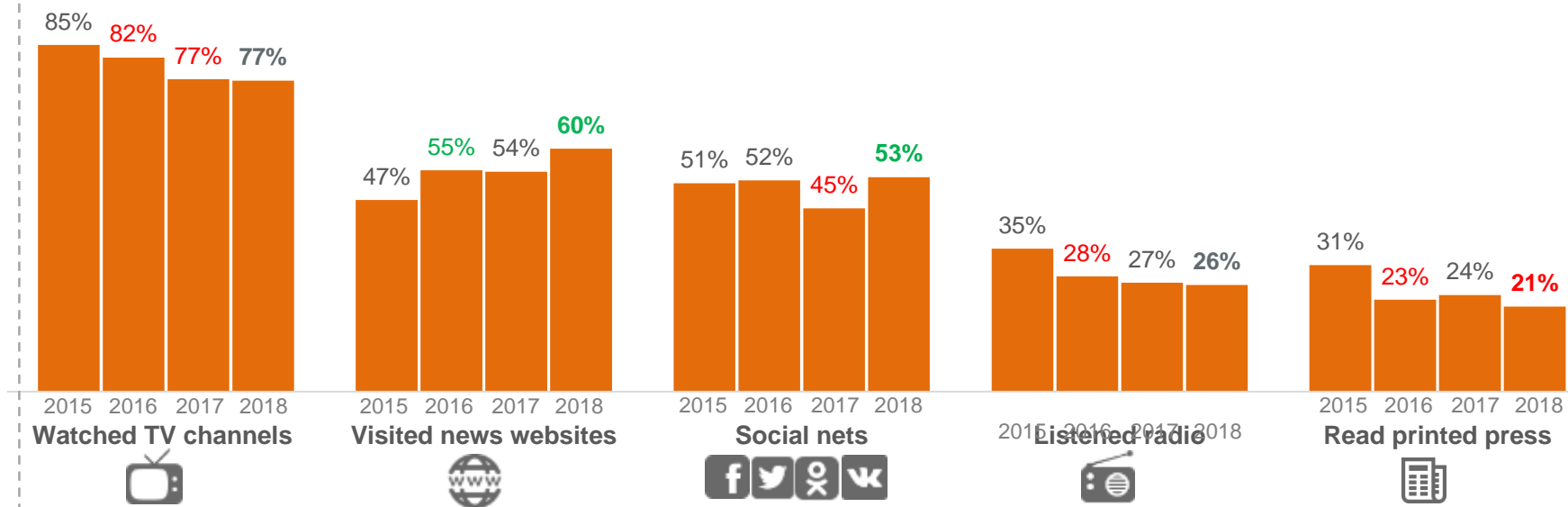
TV remained the main source of news covering progress in the implementation of these reforms (especially for residents of western regions).

MEDIA CONSUMPTION

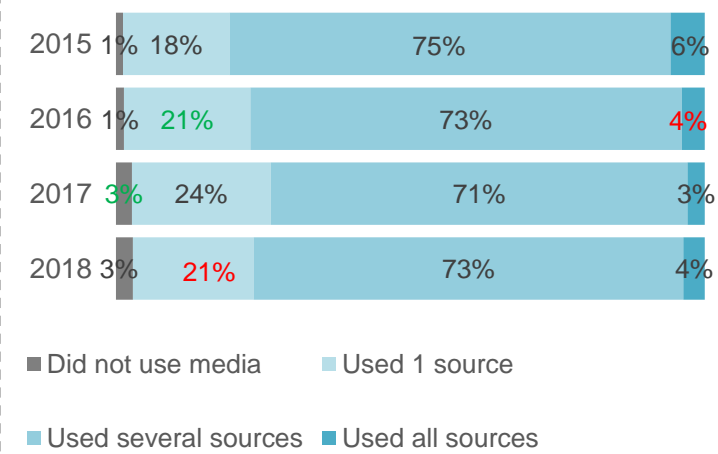
Media Activity

After having fallen steadily during each of the preceding three years, the TV audience share finally stabilized. As before, television remains the number one source of news, despite the rapid growth in the number of digital media users – the survey shows an increase in the number of people who prefer news websites. After falling in 2017, the share of social media news consumers has returned to 2016 levels. There has been a further decrease in the print media audience.

Media activity during a one month period
2015-2018



Number of media sources used
per month
2015-2018



Media types: Regional VS National VS Russian

After falling the previous year, the consumption of regional TV returned to 2016 levels. In addition, consumption of regional digital media increased from 31% to 42%. The consumption of print media also increased, mainly owing to the growth of the Ukrainian print media audience.

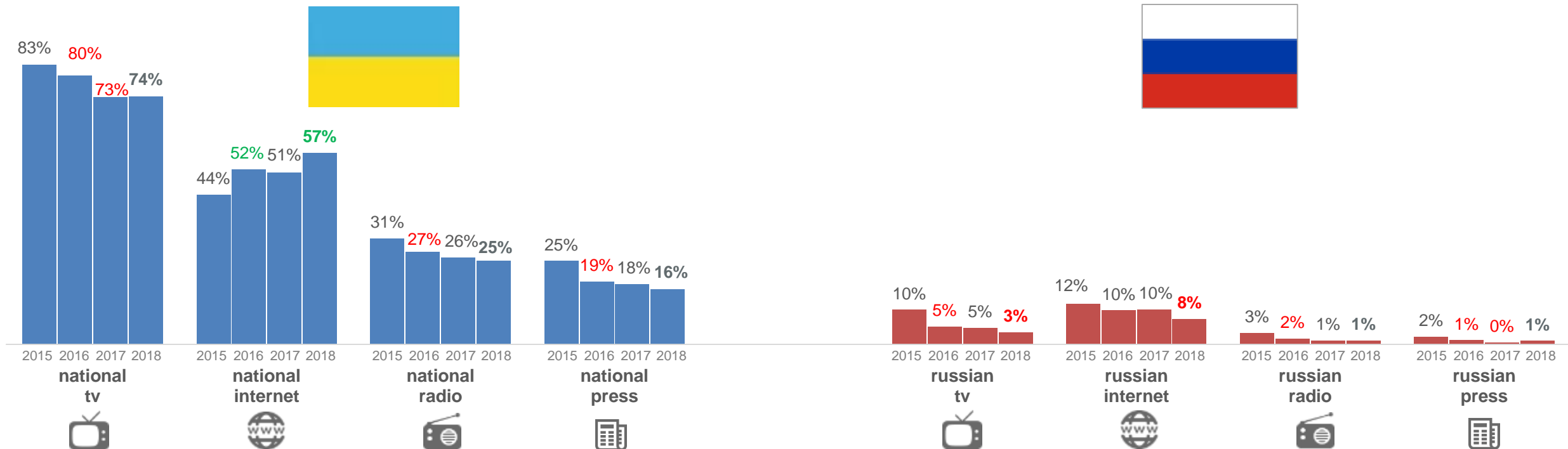
Which media's news have you watched during last 30 days?

		TV	Websites	Radio	Press
Regional	2015	43%	28%	27%	63%
	2016	44%	31%	28%	70%
	2017	39%	31%	25%	68%
	2018	45%	42%	27%	69%
National	2015	99%	93%	87%	61%
	2016	99%	91%	90%	55%
	2017	99%	90%	93%	50%
	2018	99%	92%	92%	58%
Russian	2015	12%	25%	11%	7%
	2016	7%	14%	4%	3%
	2017	5%	12%	1%	1%
	2018	6%	14%	5%	3%
Sample size (Consumers of this media)		2015, N=1404 (85% of all TA) 2016, N=1350 (82% of all TA) 2017, N=1271 (77% of all TA) 2018, N=1260 (77% of all TA)	2015, N=777 (47% of all TA) 2016, N=895 (55% of all TA) 2017, N=894 (54% of all TA) 2018, N=984 (60% of all TA)	2015, N=579 (35% of all TA) 2016, N=465 (28% of all TA) 2017, N=443 (27% of all TA) 2018, N=432 (26% of all TA)	2015, N=513 (31% of all TA) 2016, N=371 (23% of all TA) 2017, N=393 (24% of all TA) 2018, N=344 (21% of all TA)

Weekly usage of various media

The majority of the population gets news from Ukrainian media outlets. There has been an increase in weekly consumption of Ukrainian online media. Russian TV and online news are gradually losing their shares – compared to the previous year, there has been a significant decrease in the number of people checking news on Russian media at least once a week.

Weekly usage of media for getting news 2015-2018

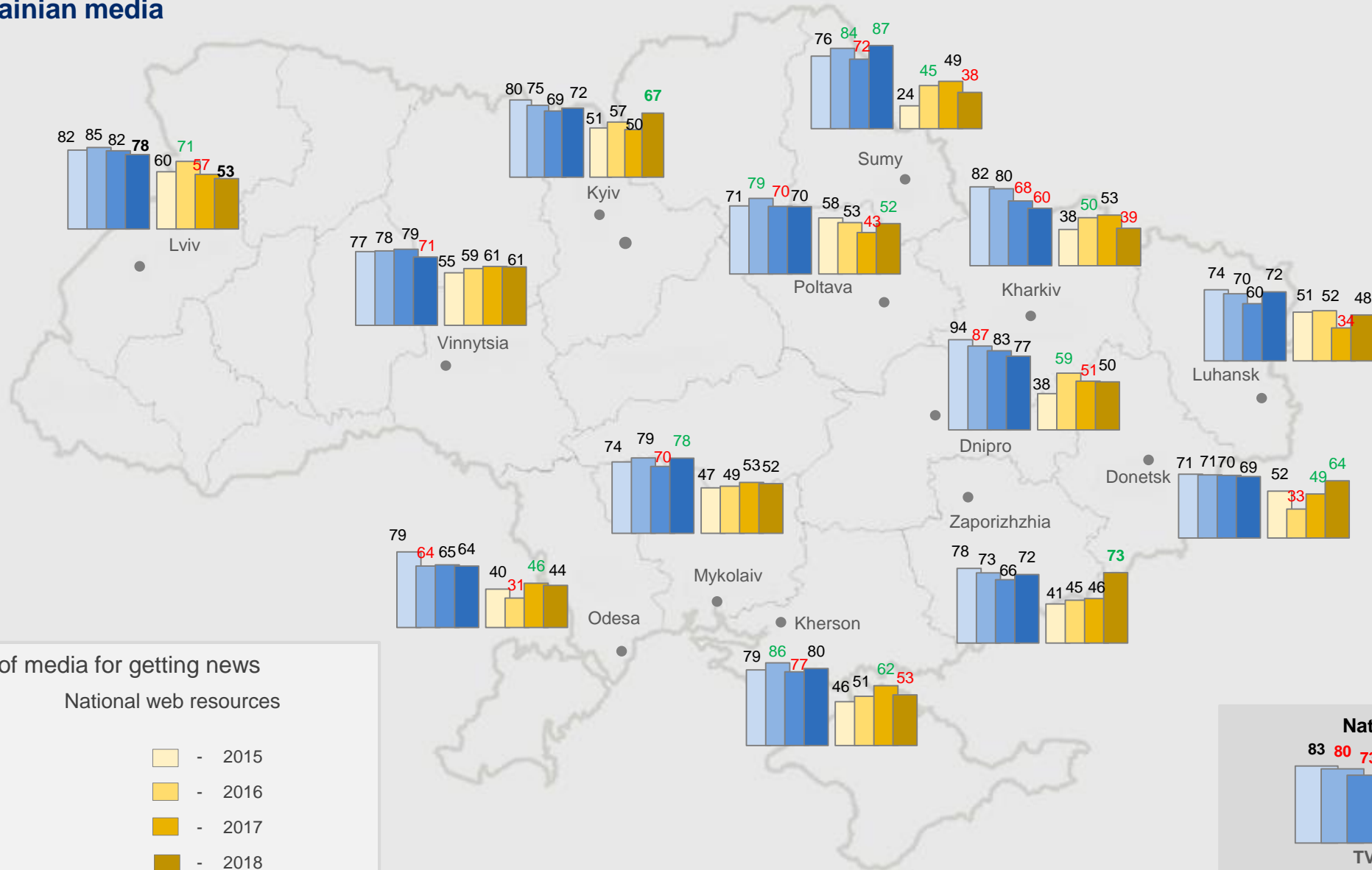


Question: Tell me how often do you use each of these media for news? (The share of those who use at least once a week)

Base: Total, N~1640/wave

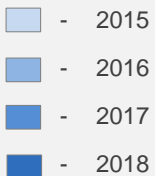
x / x – Significantly more / less at 95% compared to the previous wave

Weekly usage of Ukrainian media

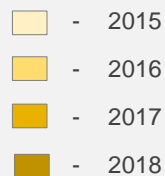


Weekly usage of media for getting news

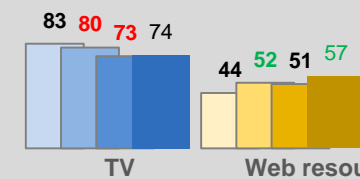
National TV



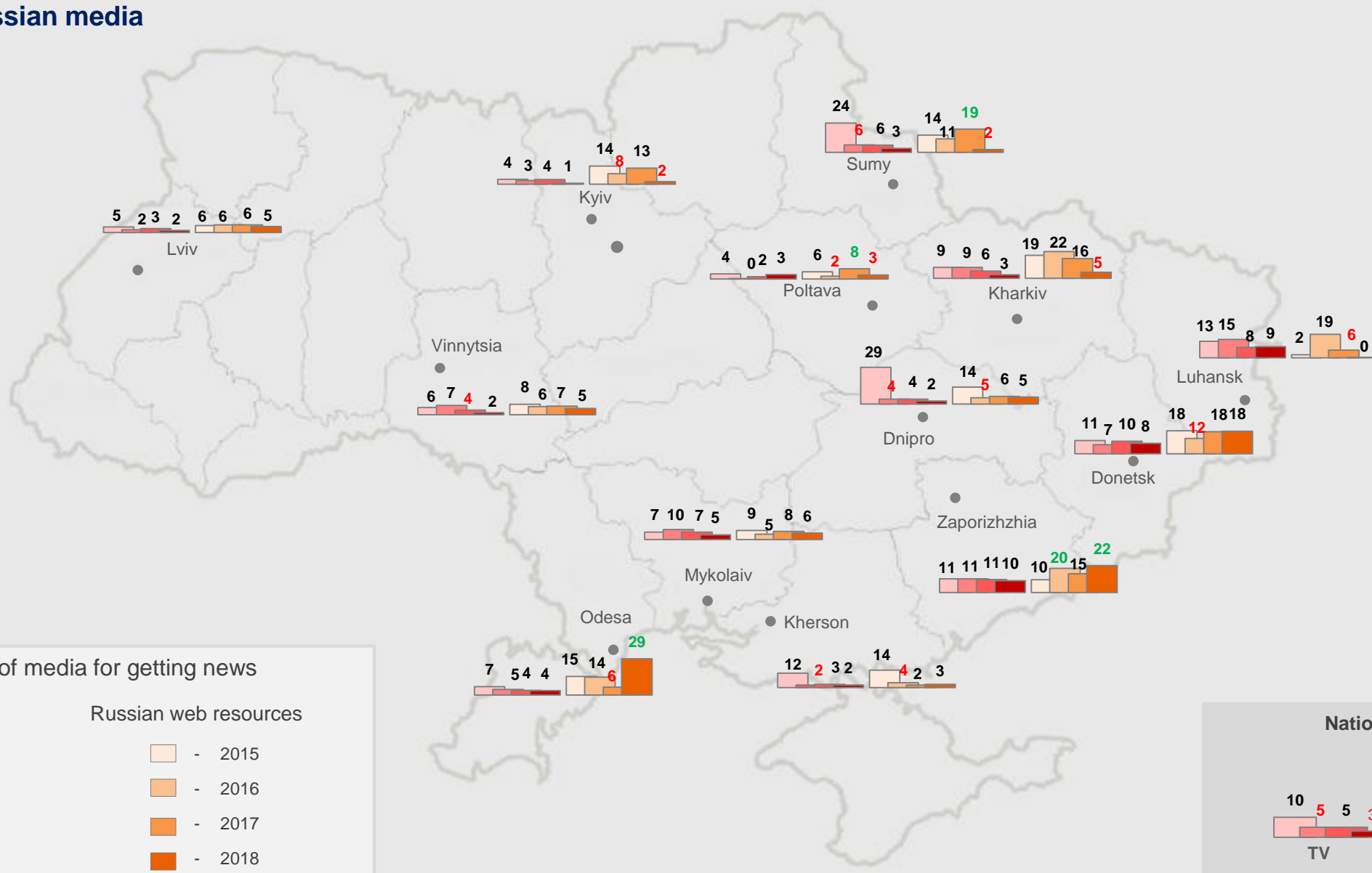
National web resources



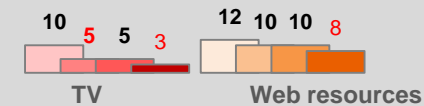
National Index



Weekly usage of Russian media



National Index



Level of satisfaction with news presentation on TV

Compared to previous years, there has been a decrease in the number of people satisfied with the completeness of information provided by Ukrainian TV channels. TV viewers also give lower scores for the importance and relevance of the content broadcast by national TV channels.

However, the survey shows no significant changes in how viewers feel about the reliability and objectivity of information provided by TV.



Satisfaction with news presentation on TV

Share of those who completely or rather agree that...		Regional	National	Russian
Broadcasts come out with periodicity convenient for me	2015	71%	76%	48%
	2016	73%	77%	49%
	2017	72%	73%	53%
	2018	68%	72%	45%
Information is being given promptly	2015	65%	70%	40%
	2016	68%	72%	48%
	2017	68%	72%	54%
	2018	67%	68%	45%
Given information is important for me	2015	68%	67%	43%
	2015	62%	64%	47%
	2017	64%	63%	44%
	2018	61%	57%	33%
Given is full, detailed information	2015	54%	53%	35%
	2016	57%	54%	28%
	2017	56%	56%	38%
	2018	53%	51%	32%
Give objective and reliable information	2015	53%	49%	38%
	2016	57%	52%	26%
	2017	49%	49%	32%
	2018	54%	49%	25%
Sample size (Consumers of TV news)		2015, N=605 (37% of all TA) 2016, N=597 (36% of all TA) 2017, N=496 (30% of all TA) 2018, N=568 (35% of all TA)	2015, N=1393 (85% of all TA) 2016, N=1333 (81% of all TA) 2017, N=1256 (76% of all TA) 2018, N=1244 (76% of all TA)	2015, N=162 (10% of all TA) 2016, N=92 (6% of all TA) 2017, N=69 (4% of all TA) 2018, N=78 (5% of all TA)

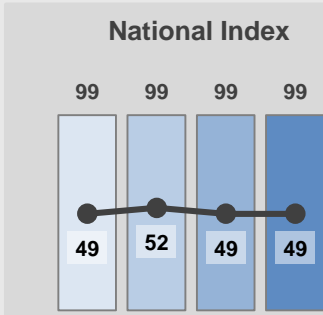
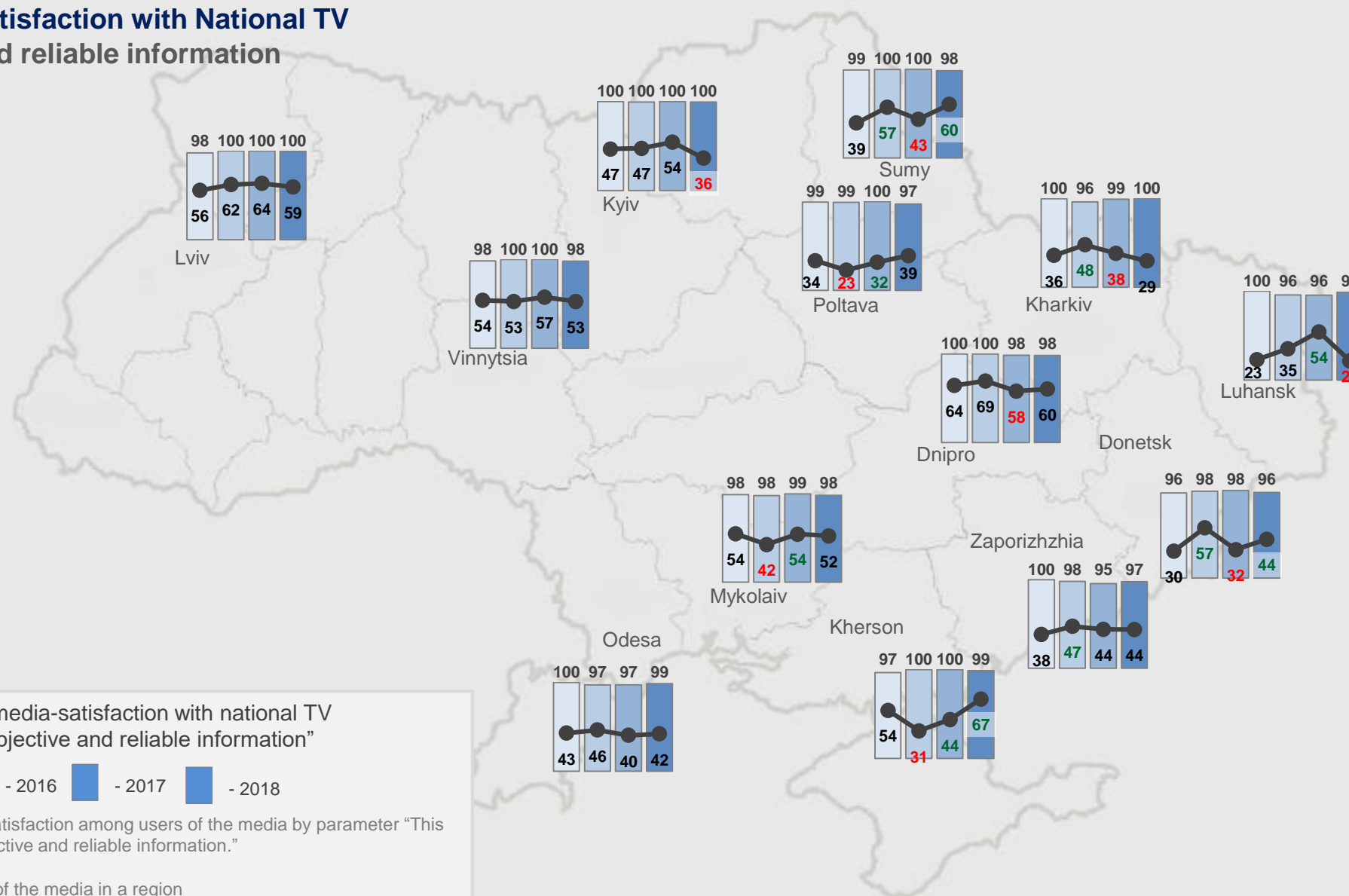
Question: Please evaluate how much you agree with following statements about NEWS...

Base: Consumers of respective media

x / x – Significantly more / less at 95% compared to the previous wave

Level of media satisfaction with National TV

Give objective and reliable information



Level of media-satisfaction with national TV
“Give objective and reliable information”

Legend:

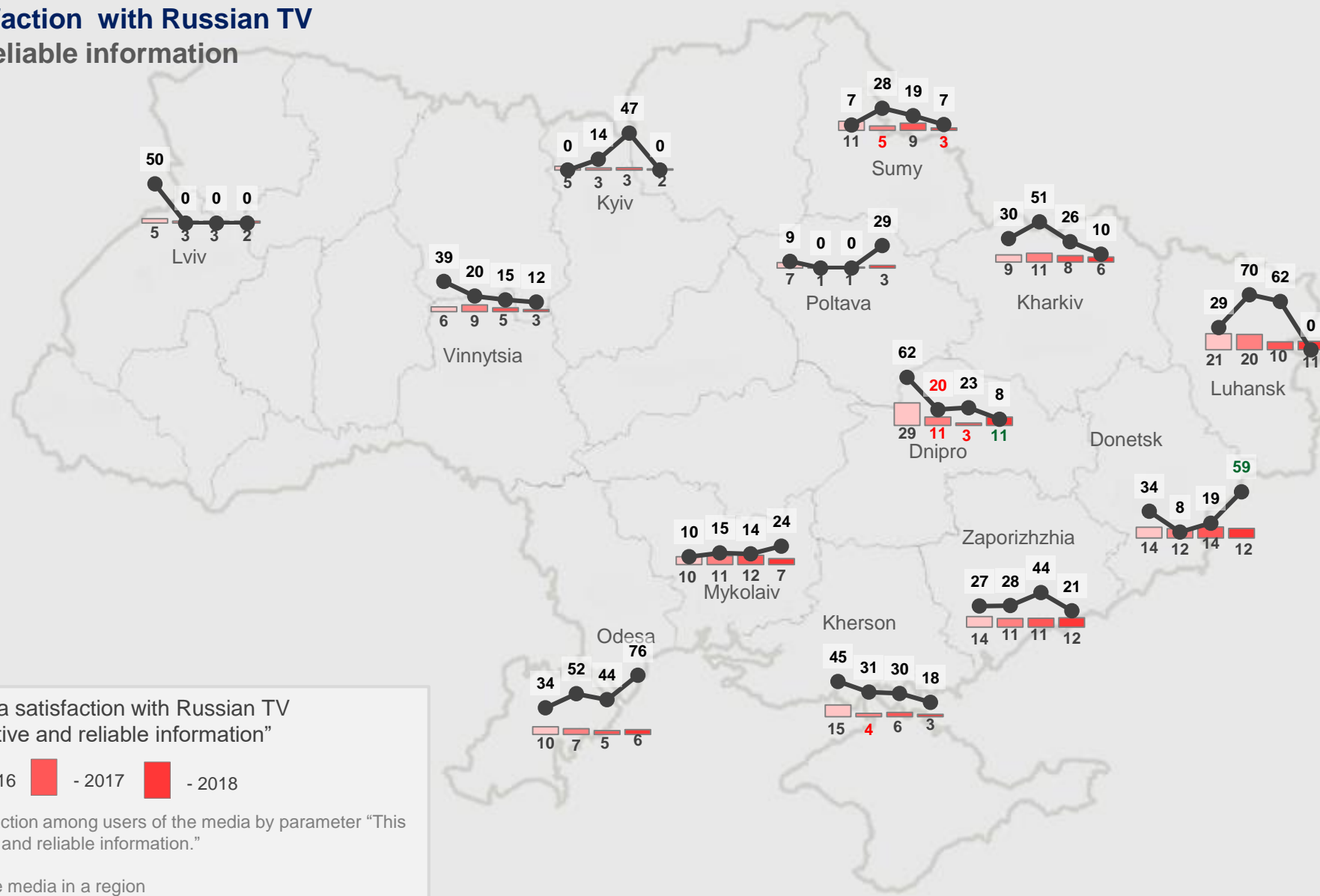
- 2015 (light blue)
- 2016 (medium blue)
- 2017 (dark blue)
- 2018 (darkest blue)

Line graph: Level of media satisfaction among users of the media by parameter “This media gives objective and reliable information.”

Grey box: - Share of users of the media in a region

Level of media satisfaction with Russian TV

Give objective and reliable information

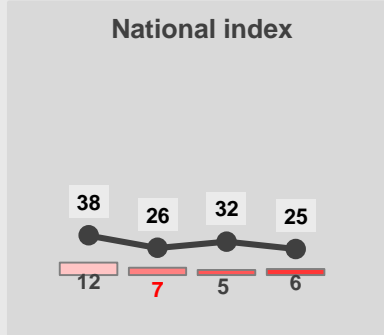


Level of media satisfaction with Russian TV
“Give objective and reliable information”

- 2015
 - 2016
 - 2017
 - 2018

Level of media-satisfaction among users of the media by parameter “This media gives objective and reliable information.”

- Share of users of the media in a region



Level of satisfaction with news presentation on the web

Overall, the audience's level of satisfaction with the content published by digital media outlets remained unchanged. However, compared to the previous years, there has been a decrease in the number of respondents who indicate that the regional digital media outlets publish important and relevant information.



Satisfaction with news presentation on the web

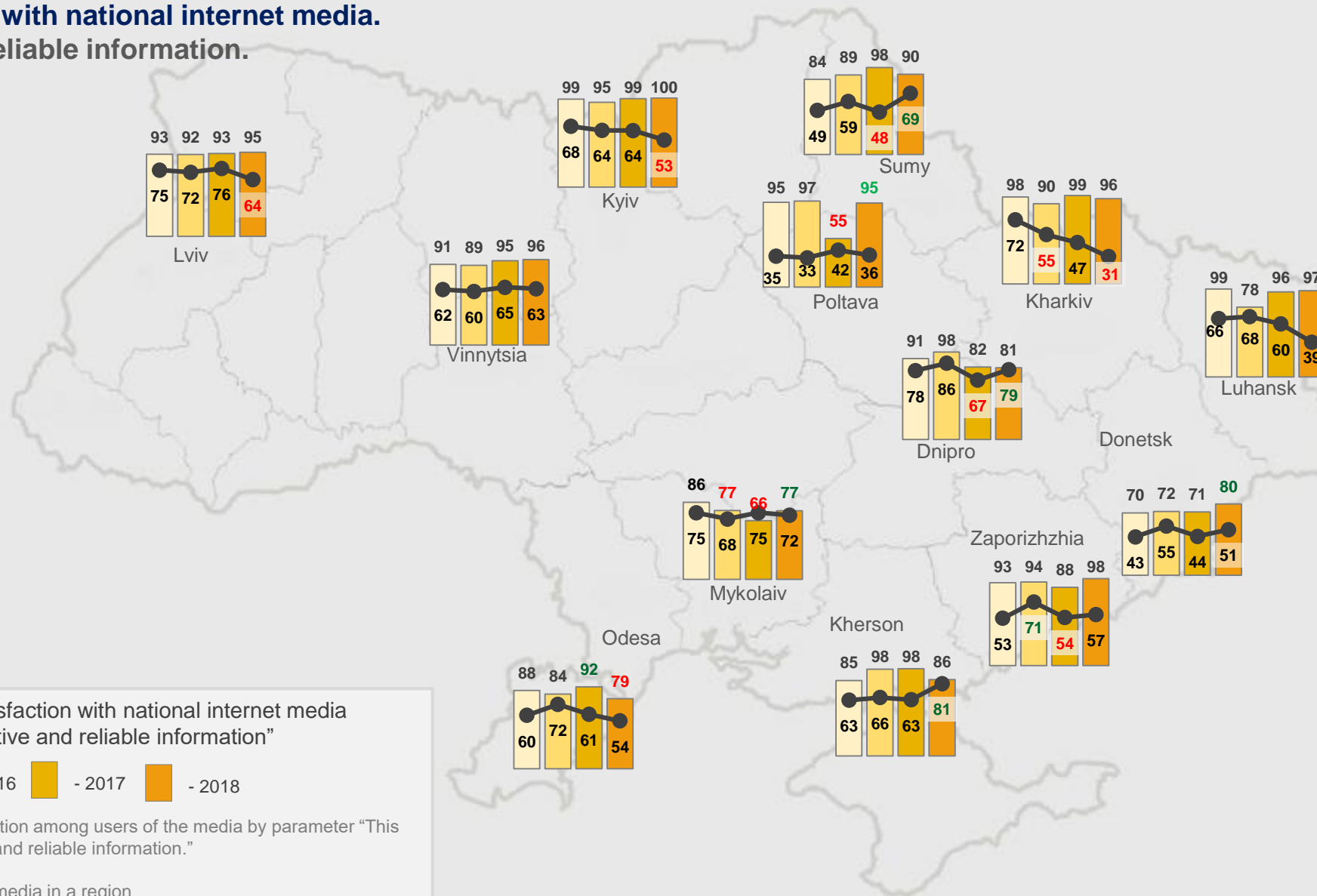
Share of those who completely or rather agree that...		Regional	National	Russian
Convenient to use	2015	87%	88%	65%
	2016	81%	86%	74%
	2017	86%	83%	74%
	2018	81%	85%	61%
Easy to find information I need	2015	81%	82%	59%
	2016	80%	81%	63%
	2017	80%	77%	65%
	2018	75%	79%	60%
Information is being given promptly	2015	78%	80%	55%
	2016	73%	82%	61%
	2017	79%	77%	62%
	2018	74%	78%	55%
Given information is important for me	2015	74%	76%	48%
	2016	70%	71%	41%
	2017	72%	68%	50%
	2018	65%	67%	41%
Detailed, full information is provided	2015	63%	68%	37%
	2016	60%	70%	32%
	2017	61%	64%	49%
	2018	61%	61%	37%
Gives objective and reliable information	2015	63%	65%	31%
	2016	65%	65%	22%
	2017	65%	59%	32%
	2018	61%	57%	28%
Sample size (Internet news users)		2015, N=218 (13% of all TA) 2016, N=277 (17% of all TA) 2017, N=281 (17% of all TA) 2018, N=410 (25% of all TA)	2015, N=722 (44% of all TA) 2016, N=812 (50% of all TA) 2017, N=805 (49% of all TA) 2018, N=901 (55% of all TA)	2015, N=197 (12% of all TA) 2016, N=122 (7% of all TA) 2017, N=104 (6% of all TA) 2018, N=133 (8% of all TA)

Question: Please evaluate how much you agree with following statements about NEWS...

Base: Consumers of respective media

x / x – Significantly more / less at 95% compared to the previous wave

Level of satisfaction with national internet media. Give objective and reliable information.



Level of media satisfaction with national internet media
“Give objective and reliable information”

- 2015
 - 2016
 - 2017
 - 2018

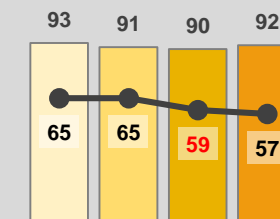


Level of media satisfaction among users of the media by parameter “This media gives objective and reliable information.”

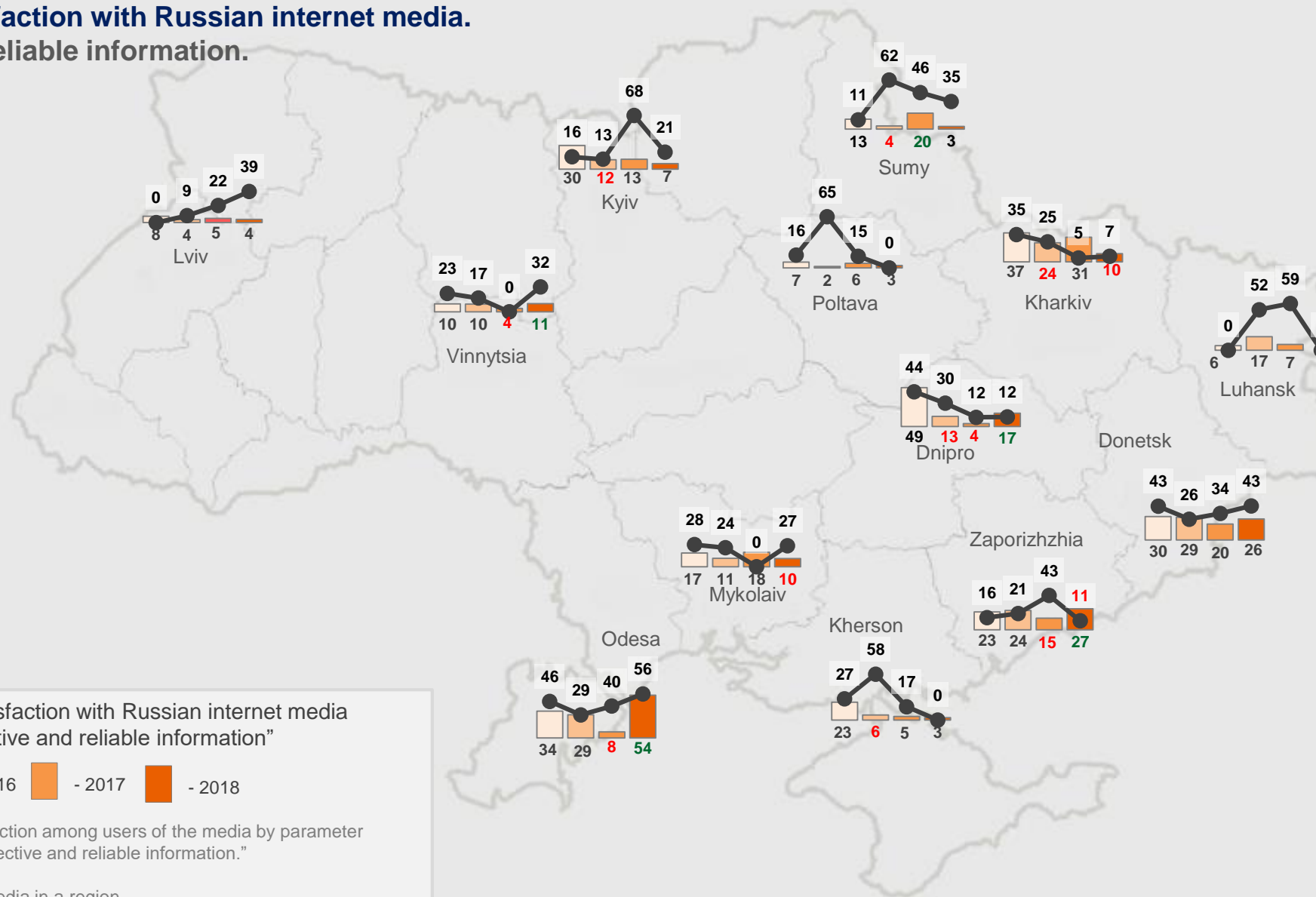


Share of users of the media in a region

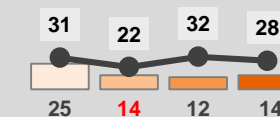
National index



Level of media satisfaction with Russian internet media. Give objective and reliable information.



National index



National media ratings

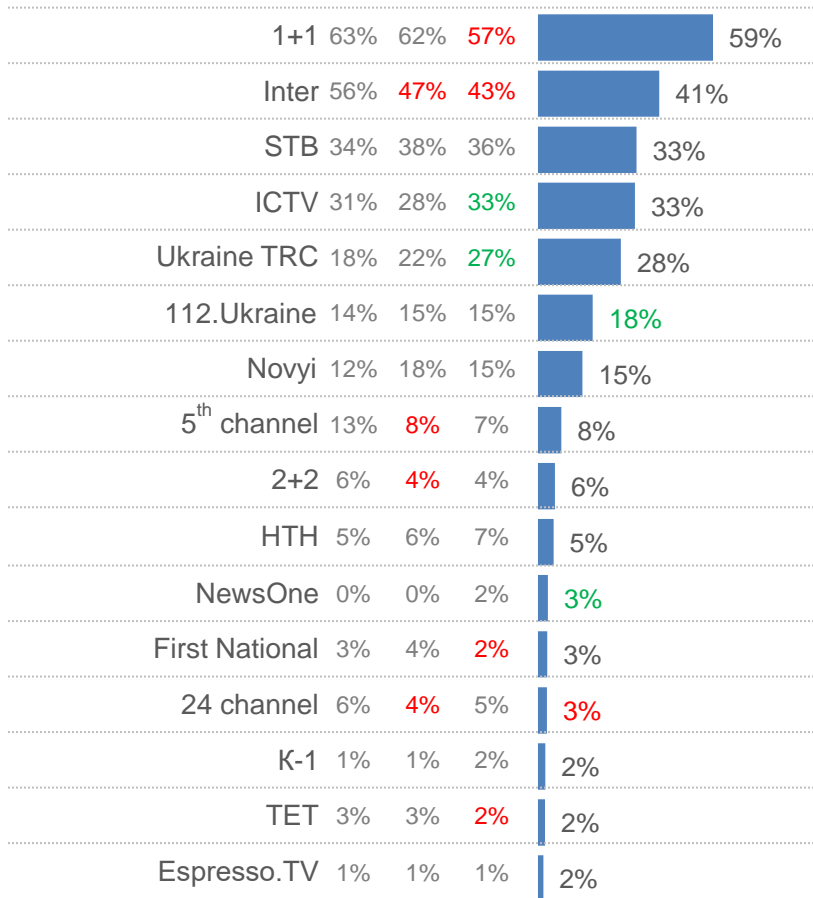


TV



2015 2016 2017

2018



What are the three national TV channels whose news you see most often?

Base:

N=1393 / 1333 / 1256 / 1244
, Consumers of national TV

N=722 / 812 / 805 / 901

Consumers of national Internet Media



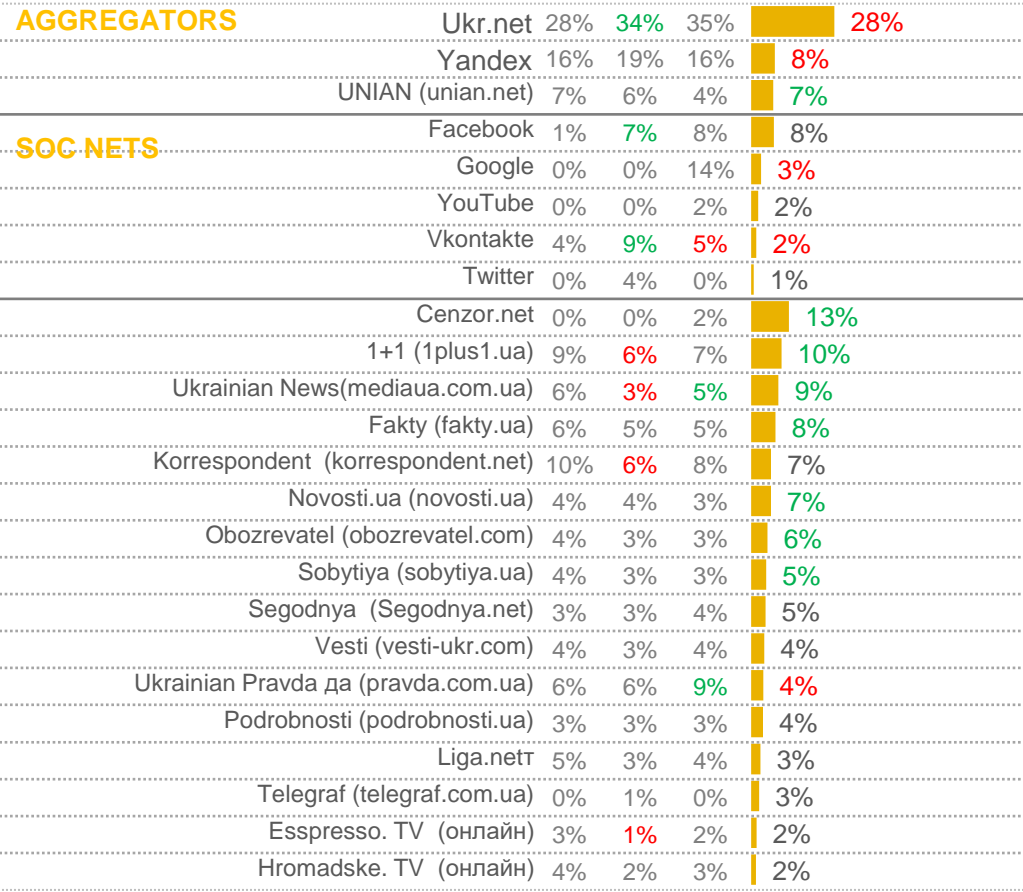
Internet



2015 2016 2017

2018

AGGREGATORS



What are the three most popular sites you visit most often?

x / x – Significantly more / less at 95% compared to the previous wave

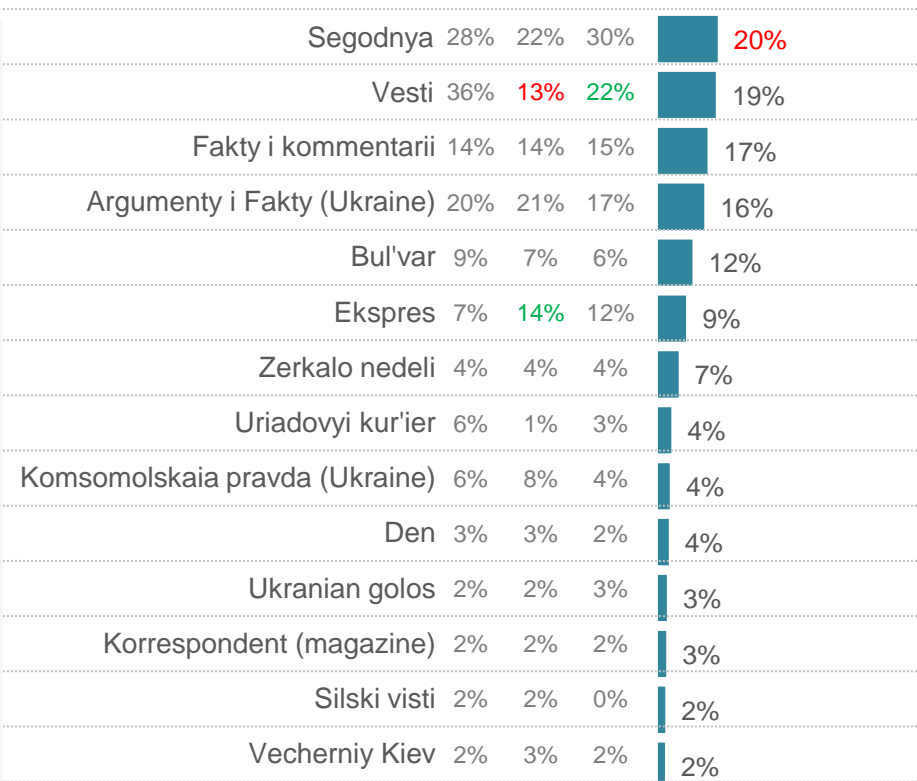
National media ratings



Press



2015 2016 2017 **2018**



What are the three national editions you read most often?

Base N= 315 / 203 / 198 / 201
 Consumers are a nation. printed media

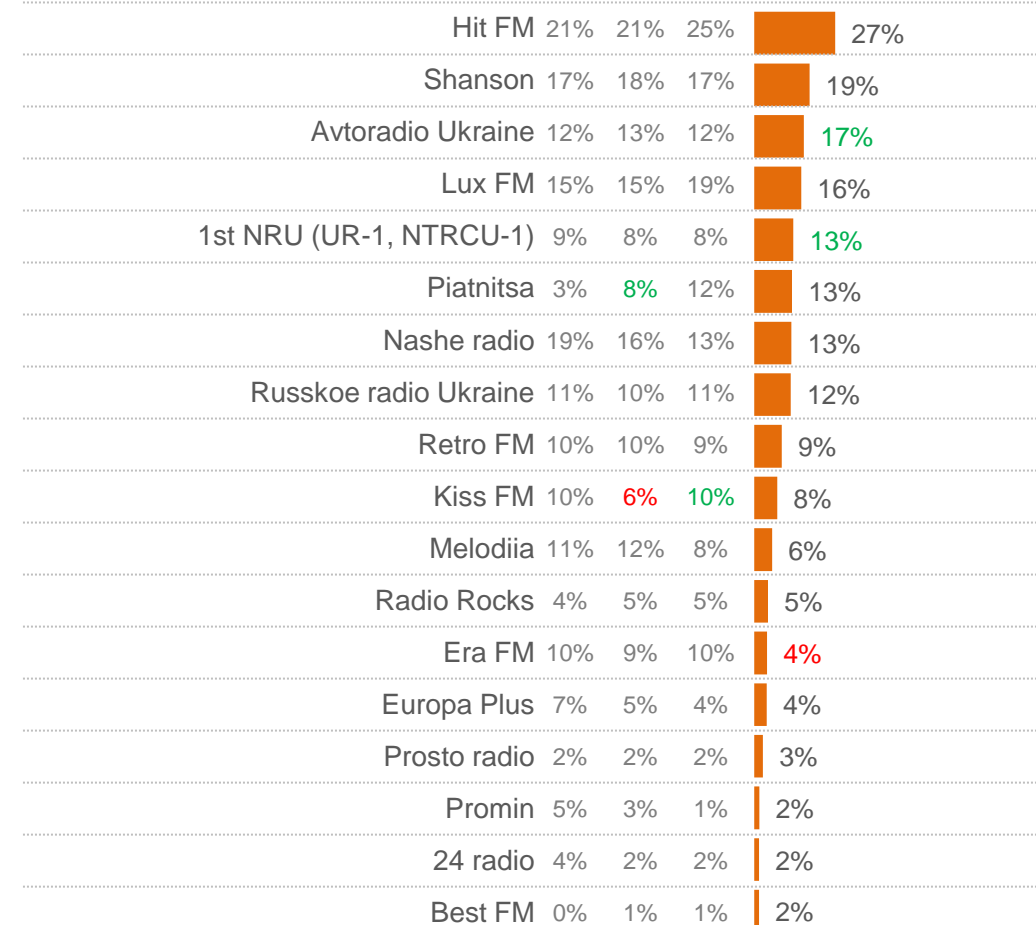
N=506 / 418 / 412 / 400
 Consumers are generally national. radio stations



Radio



2015 2016 2017 **2018**



What are the three nationwide radio stations that you are listening to the news most often?

x / x – Significantly more / less at 95% compared to the previous wave

Russian media ratings



TV



2015 2016 2017 **2018**

RTR-Planeta	25%	19%	27%		24%
NTV (NTV-Mir)	27%	24%	21%		24%
Rossiia 1	13%	26%	19%		19%
Rossiia 24	27%	27%	24%		16%
STS	9%	9%	16%		12%
Pervyi kanal	13%	22%	26%		12%
REN TV	16%	8%	3%		11%
Pervyi kanal. Vsemirnaia set	6%	2%	5%		8%
THT	0%	0%	2%		4%
Dozhd'	13%	11%	10%		4%
5 channel (Petersburg)	7%	9%	2%		4%
Rossiia 2	2%	1%	0%		3%
Kultura (Rossiia-K)	1%	0%	1%		2%

What is the name of the three Russian TV channels whose news you see most often?

Base:

N= 162 / 92 / 69 / 78
Consumers of Russian TV channels

N= 198 / 122 / 104 / 133
Consumers of Russian Internet sites



Internet



2015 2016 2017 **2018**

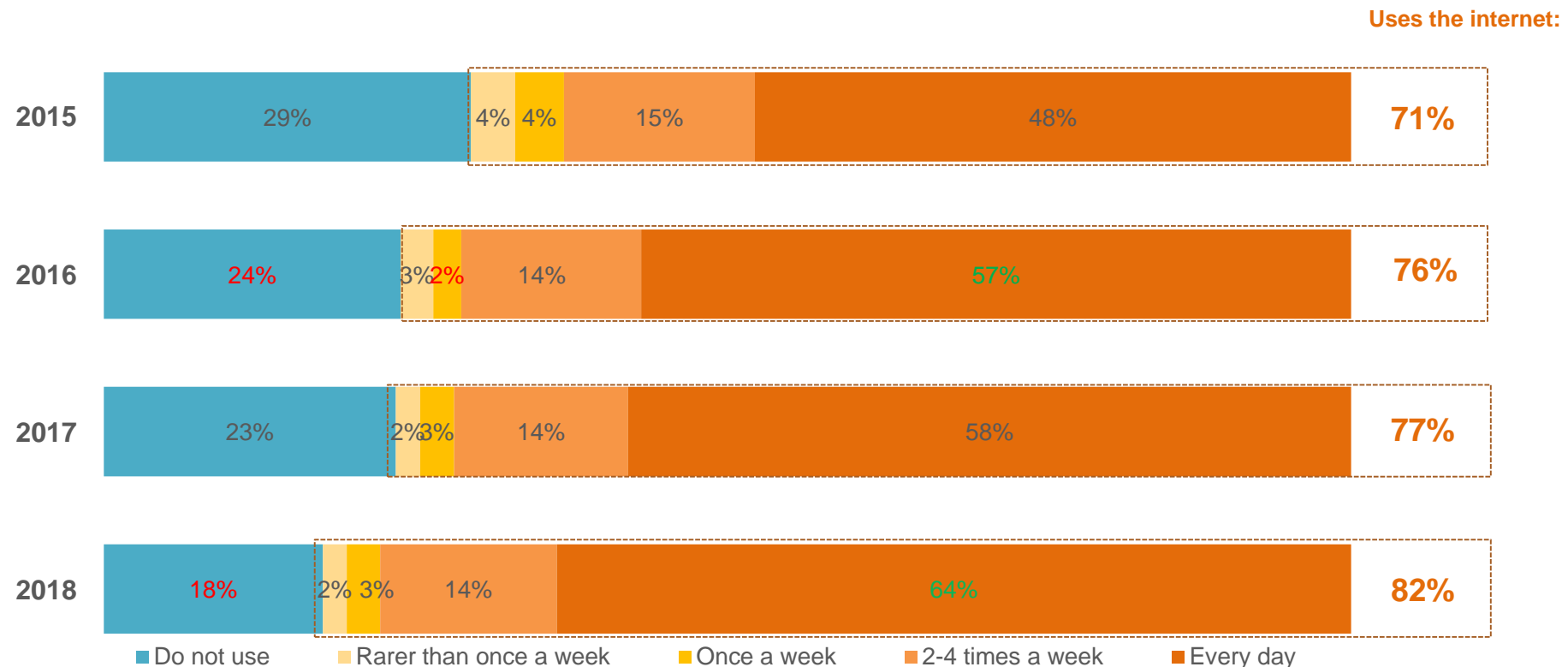
Lenta.ru	8%	17%	19%		16%
Vesti.ru	9%	14%	10%		13%
M24.ru	5%	3%	6%		9%
Lifenews.ru	10%	4%	7%		6%
Yandex.ru	0%	0%	0%		6%
Gazeta.ru	5%	2%	3%		4%
Forbes.ru	5%	2%	3%		4%
Kommersant.ru	3%	4%	3%		4%
Newsru.com	3%	4%	3%		3%
Vedomosti.ru	3%	4%	2%		3%
Kp.ru	2%	1%	2%		2%
Izvestia.ru	2%	1%	4%		2%

What is the name of the three Russian news sites that you visit most often?

x / x – Significantly more / less at 95% compared to the previous wave

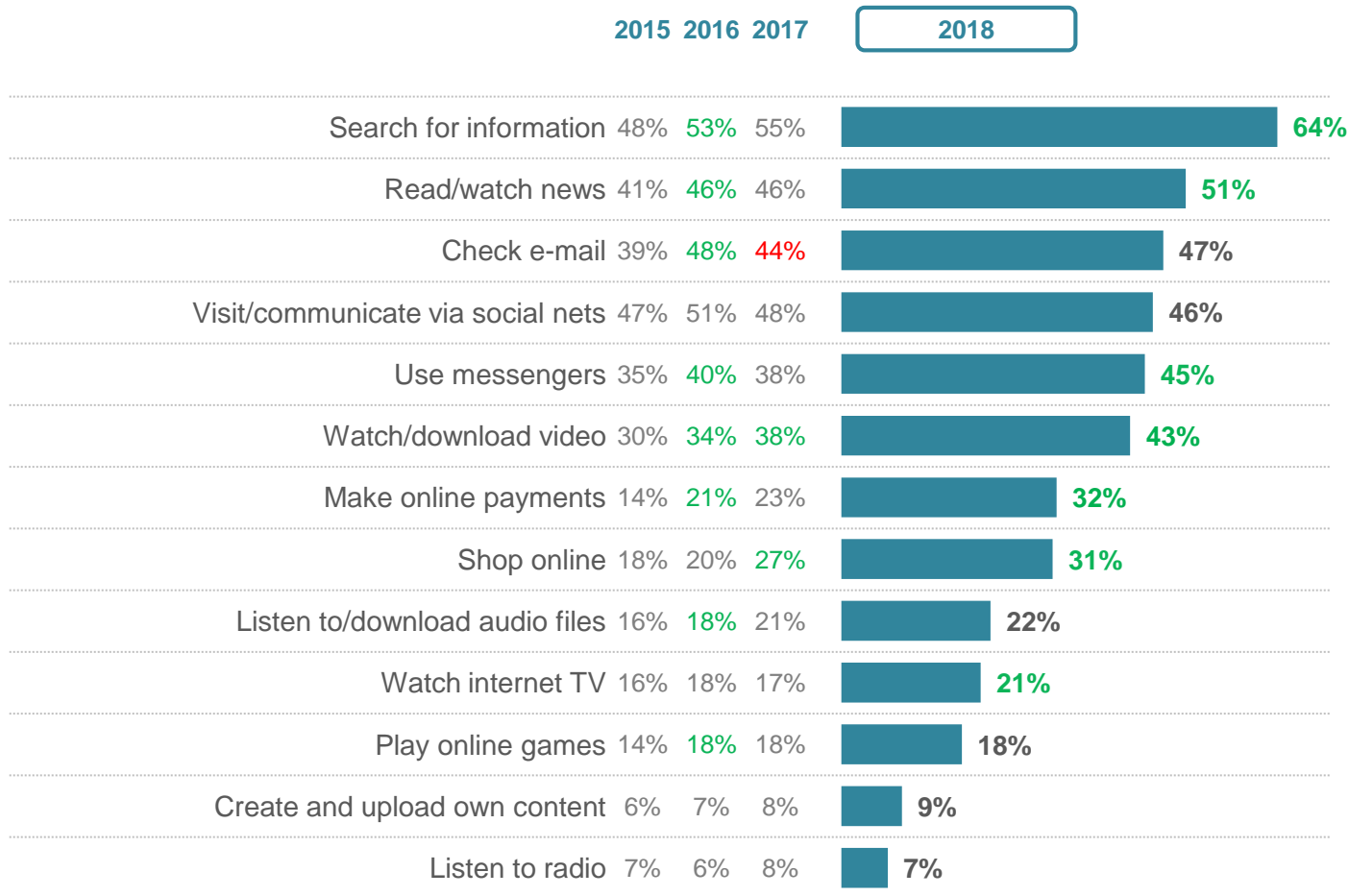
Internet usage

The survey found an increase in the number of active internet users – 64% of respondents (compared to 58% last year) indicated that they used the internet every day.



Reasons for using the internet

As before, the majority of the internet users search the web to find the information they need. Respondents mentioned more types of online activities than they have in previous years. For example, there has been an increase in the number of the internet users who preferred messenger services for communicating, made online payments and online purchases, and watched online TV, videos, and news streams.



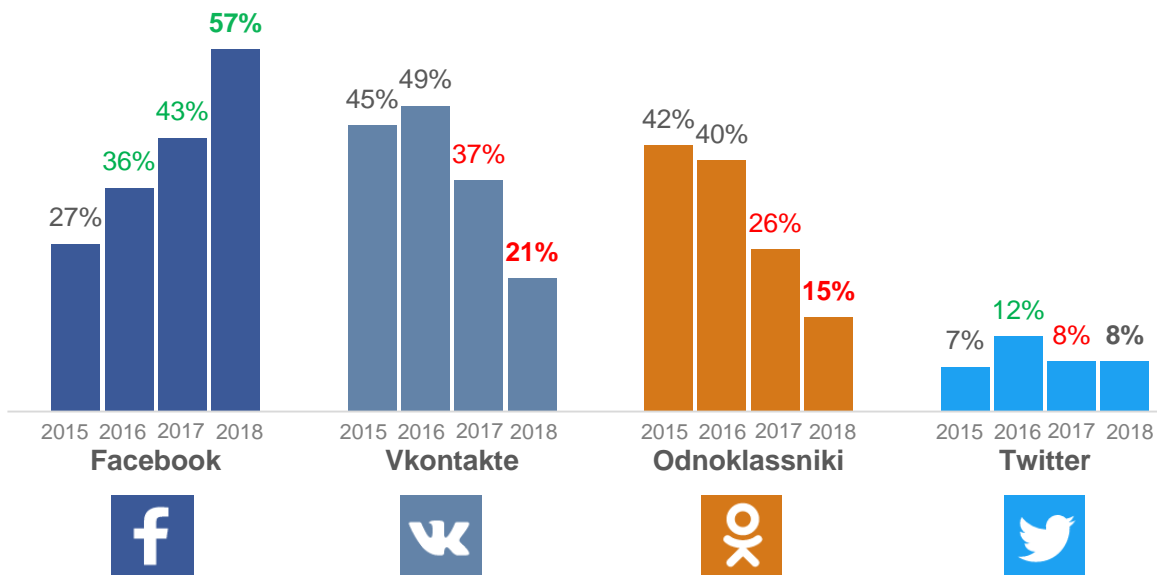
Social network usage

Since the official ban on access to a number of popular Russian internet resources and social networks in Ukraine last year, consumption of Russian social media (in particular, Vkontakte, Odnoklassniki) has decreased rapidly. Meanwhile, Facebook's audience has grown significantly – more than half of respondents confirmed having used Facebook at least once a month.

In addition, Facebook's position as a reliable news source is on the rise – the use of Facebook for news continues to grow.

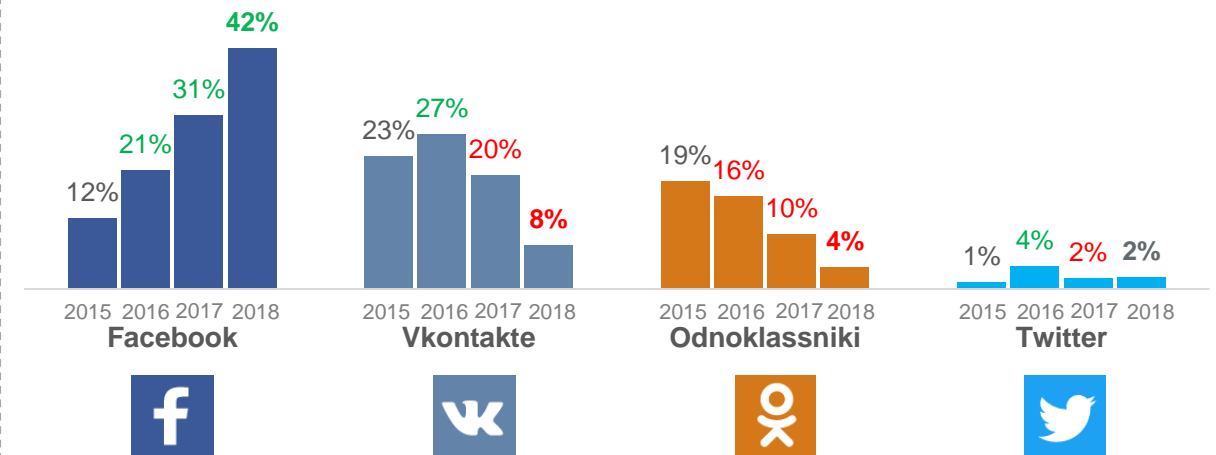
Social networks usage

2015-2018



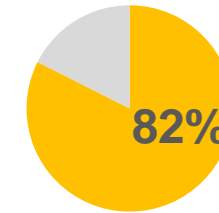
Using social networks as a source of news

2015-2018



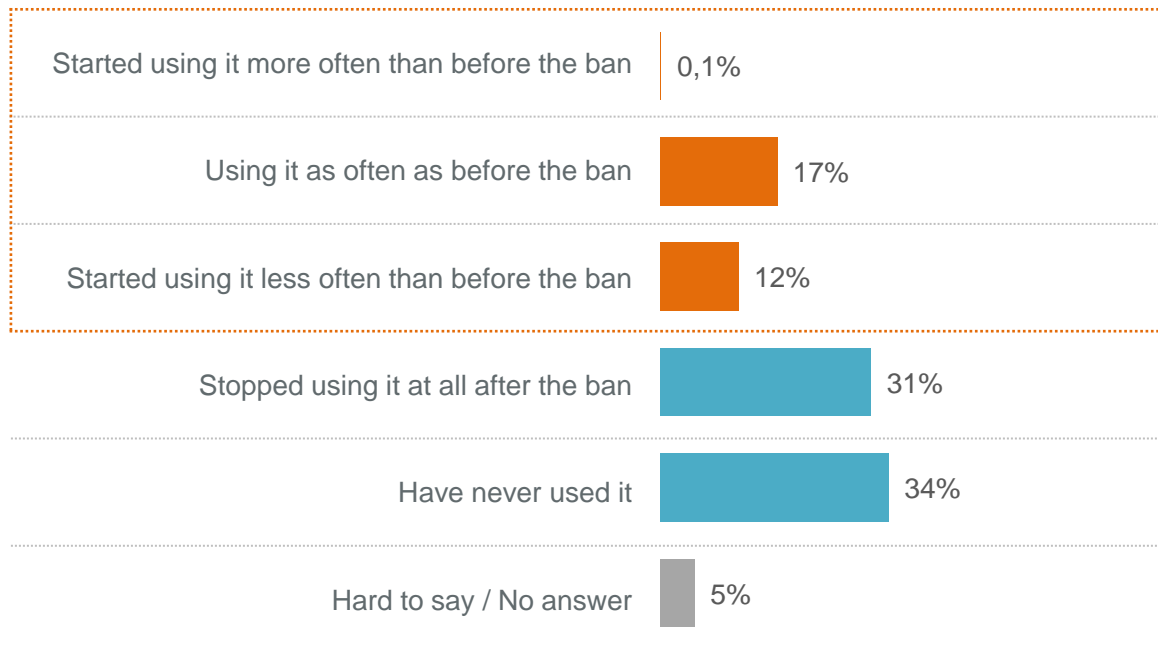
Public attitude to the Russian social network VKontakte in 2018

Following the official ban on access to a number of popular Russian websites and social networks, the patterns of use of the social network "VKontakte" changed significantly: one third of internet users have stopped using this social network, and more than 10% of Ukrainians have begun visiting this social network less often than before the introduction of the ban. The VPN app has become a popular tool for bypassing the VKontakte block, despite limited access to vk.com in Ukraine.

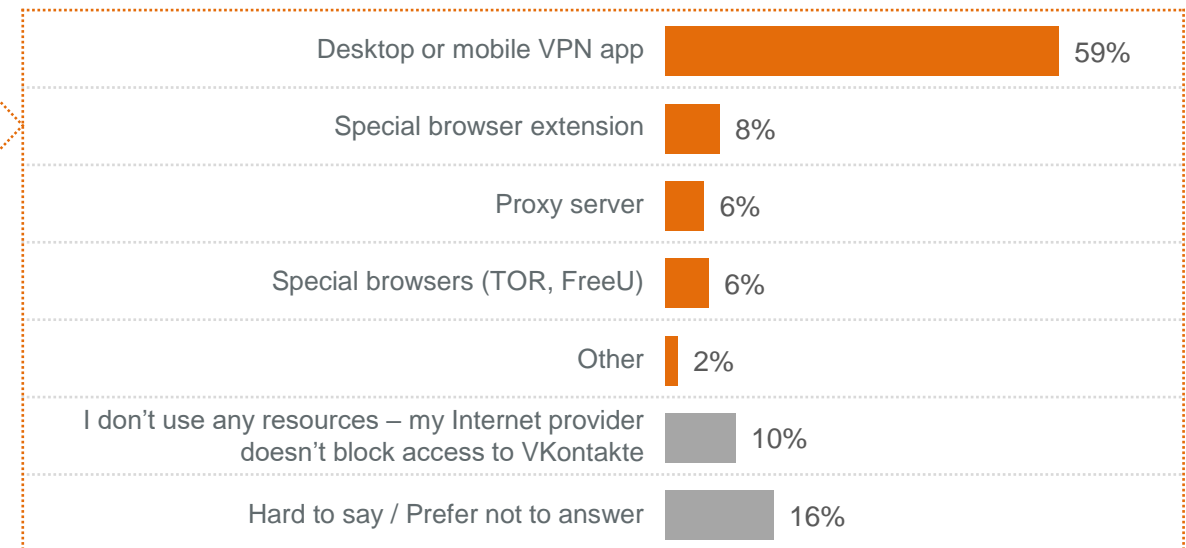


the percentage of internet users in Ukraine in 2018

The Use of VKontakte



Resources for bypassing the ban on access to VKontakte



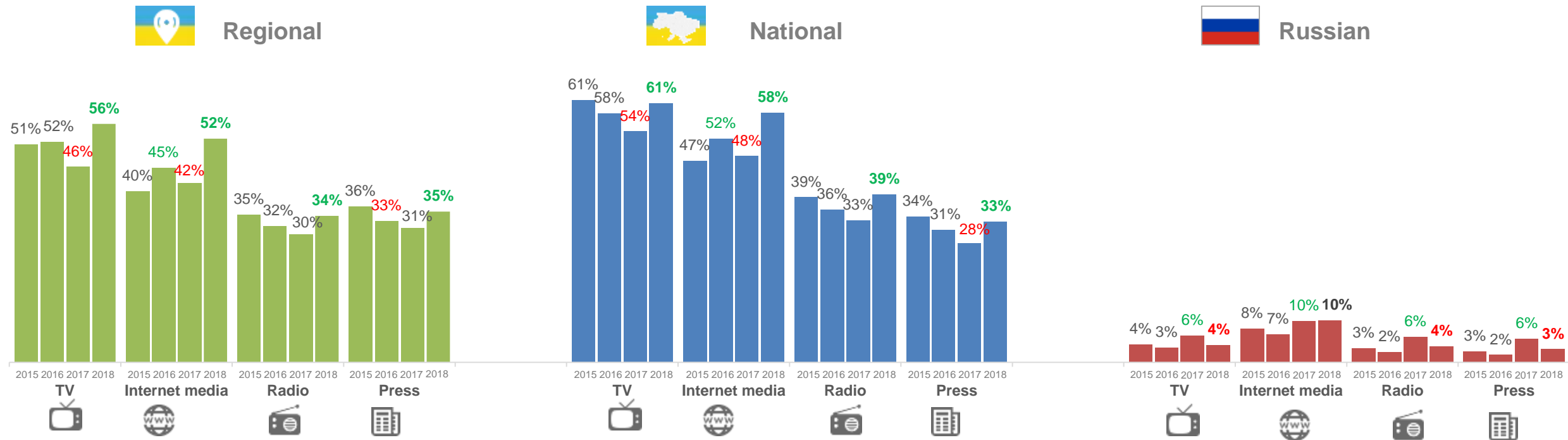


TRUST IN MEDIA

Level of trust in news presented in the media

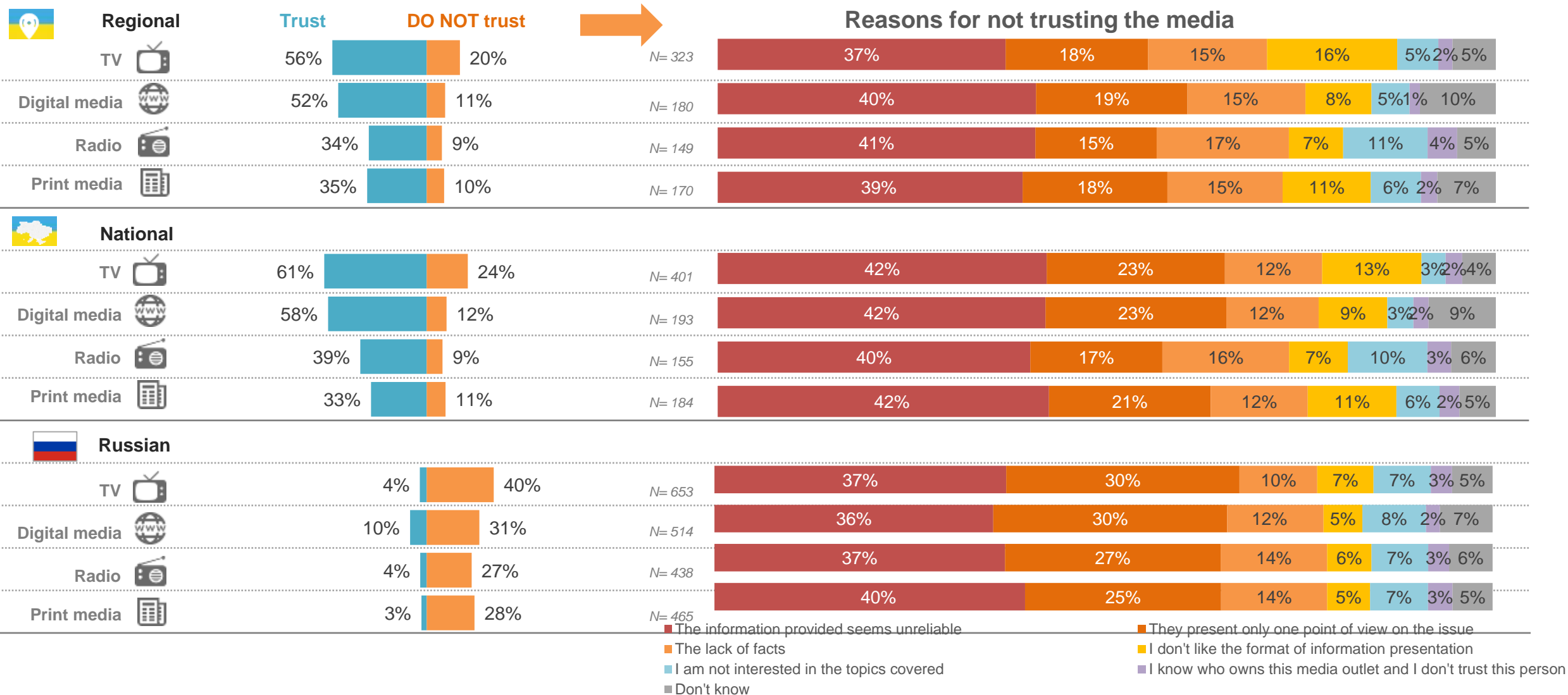
Most respondents demonstrated trust only in Ukrainian media.
 There has been an increase in the level of trust in both regional and national media.
 Meanwhile, the level of trust in Russian TV, radio and print media has decreased, compared to the previous year's findings.

Trust in media, 2015-2018



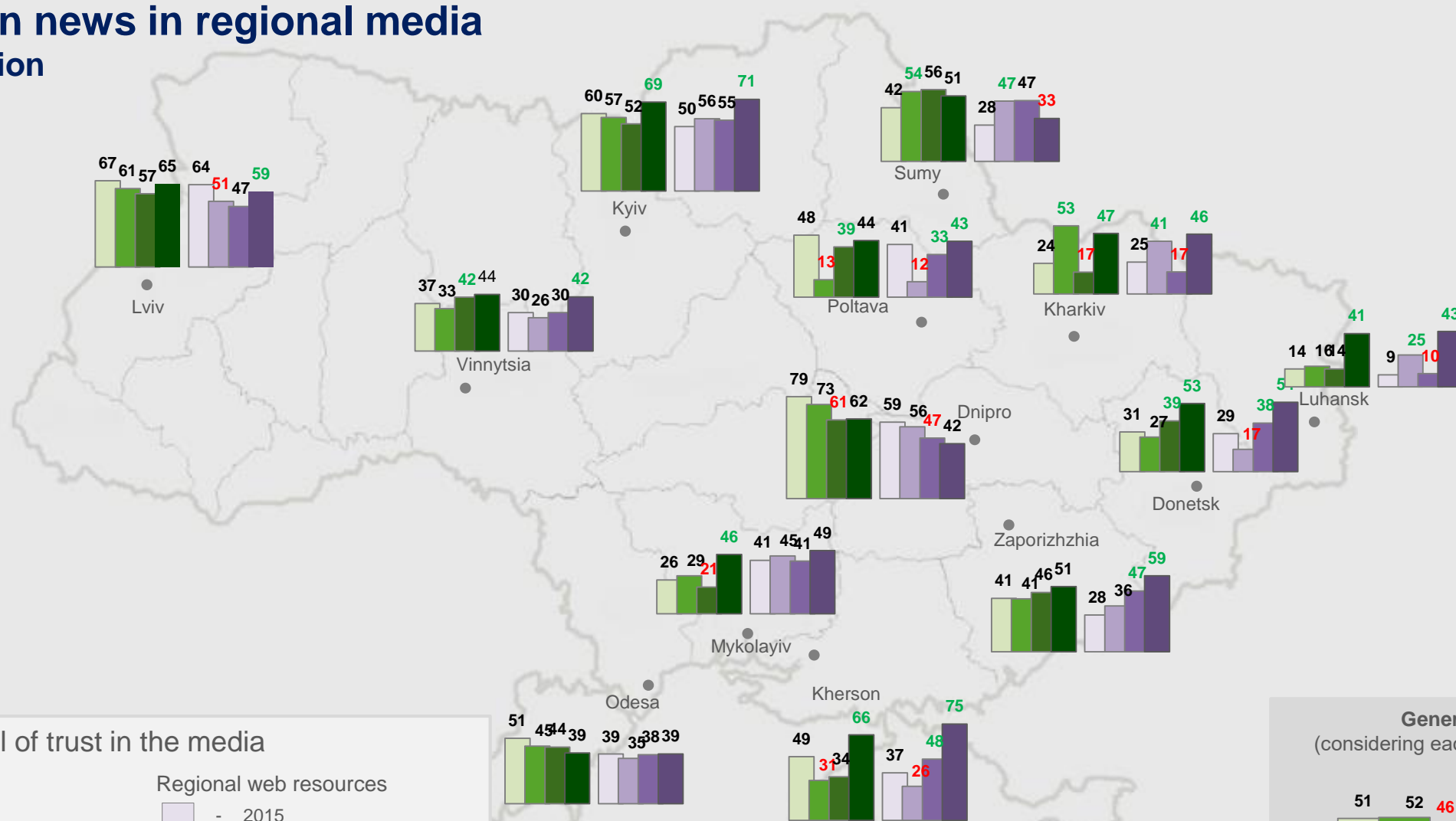
Key reasons why Ukrainians do not trust the media

The key reasons for not trusting the media include unreliability of the information provided and presentation by an author of only one point of view on a topic or issue.



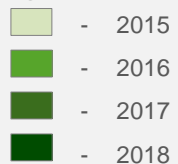
Level of trust in news in regional media

Regional distribution

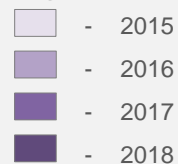


Level of trust in the media

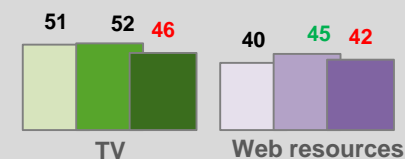
Regional TV



Regional web resources

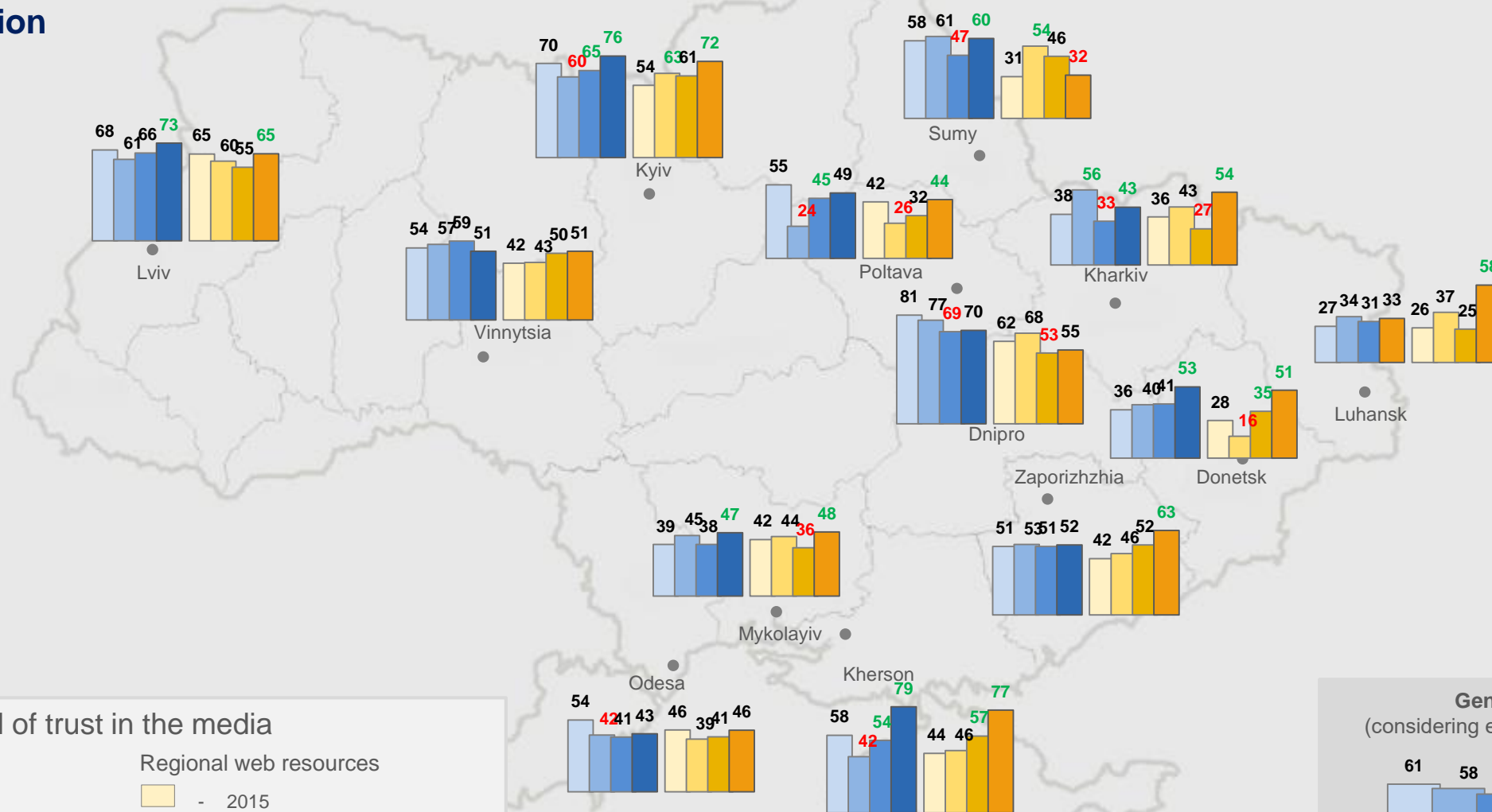


General index (considering each region's weight)



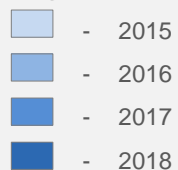
Level of trust in news in national Ukrainian media

Regional distribution

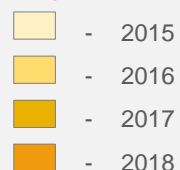


Level of trust in the media

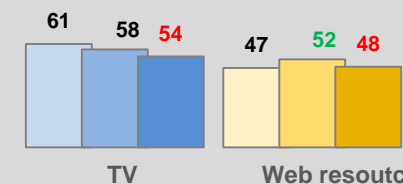
Regional TV



Regional web resources

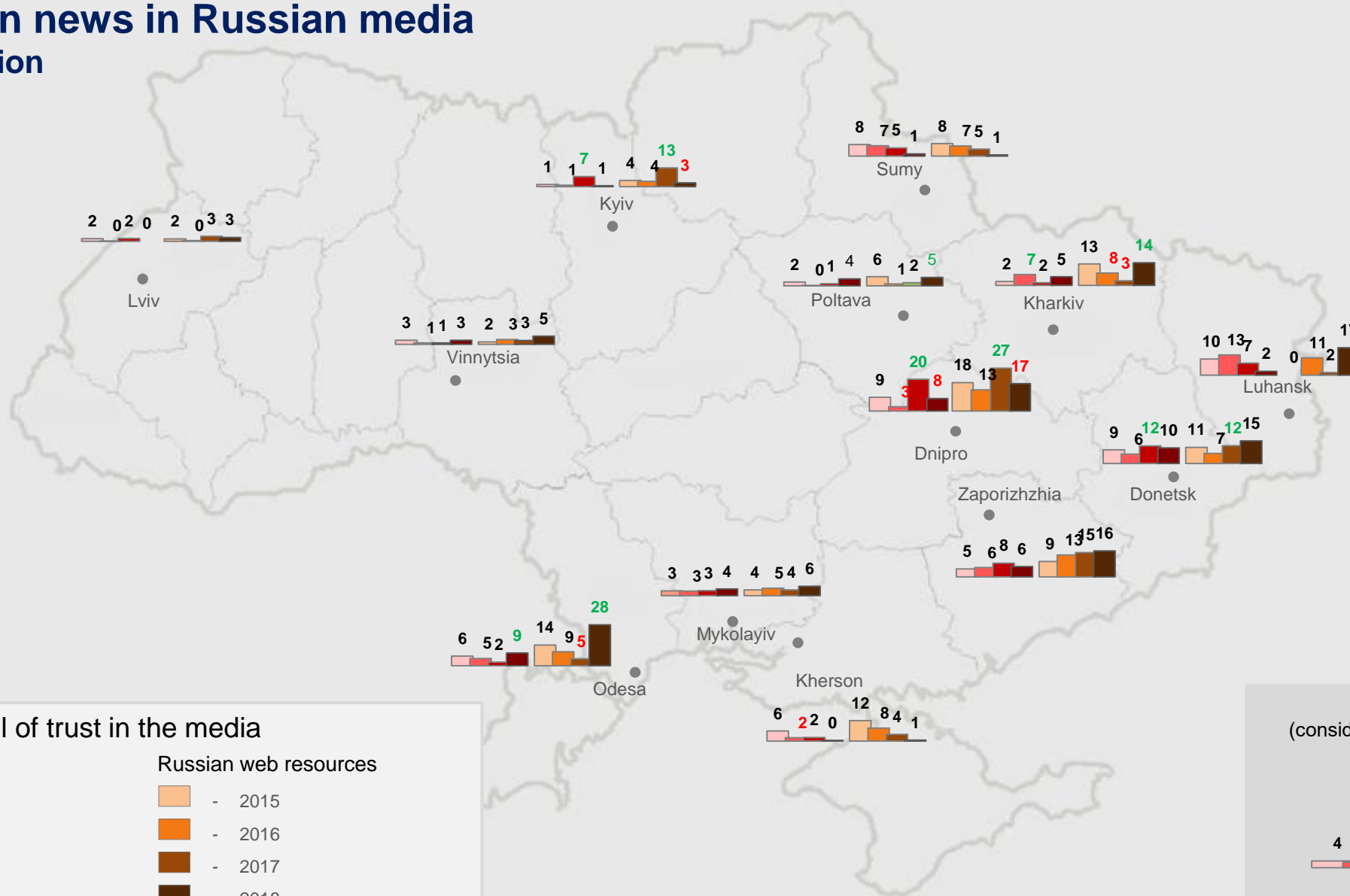


General index (considering each region's weight)



Level of trust in news in Russian media

Regional distribution





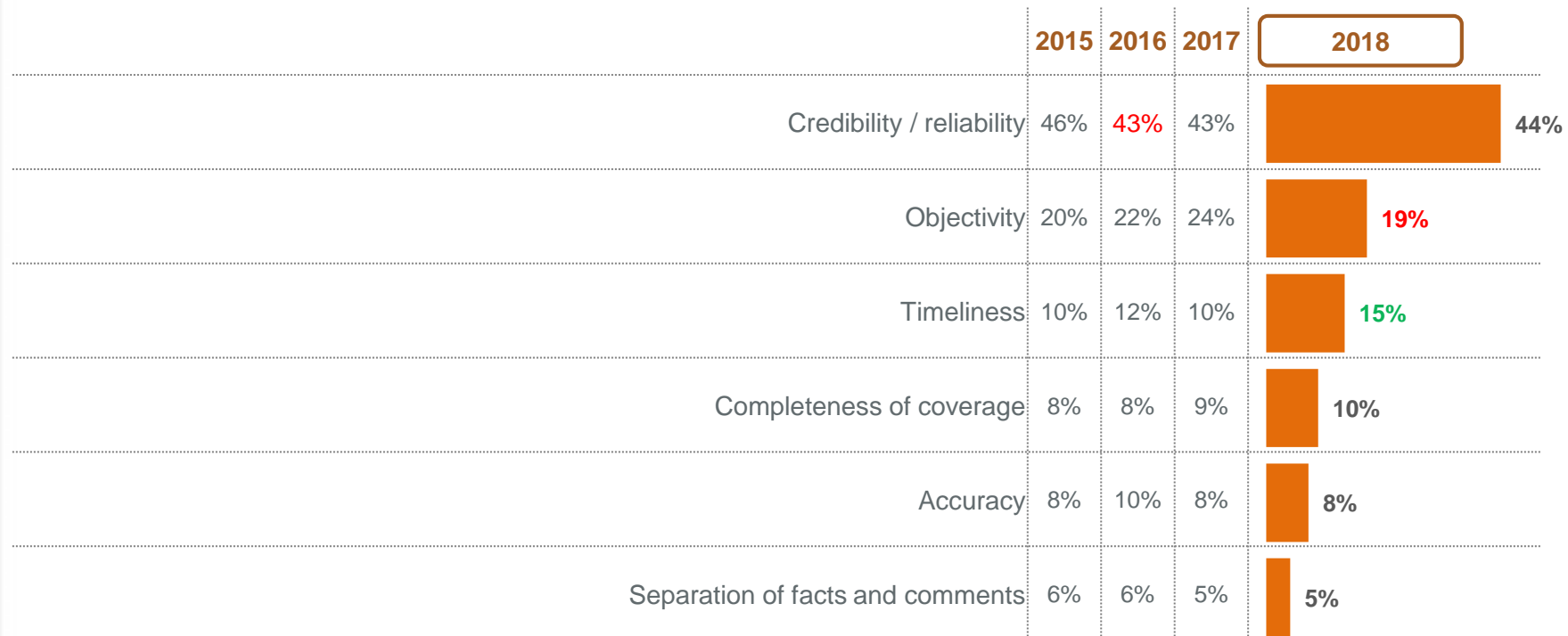
MEDIA COMPETENCE

Demands in news

People’s main requirements from the news have remained unchanged since the first study (i.e. during the period of three years) – accuracy and credibility. Compared to last year, more respondents underlined timeliness as one of the key news values.

Main demand to news

2015 - 2018



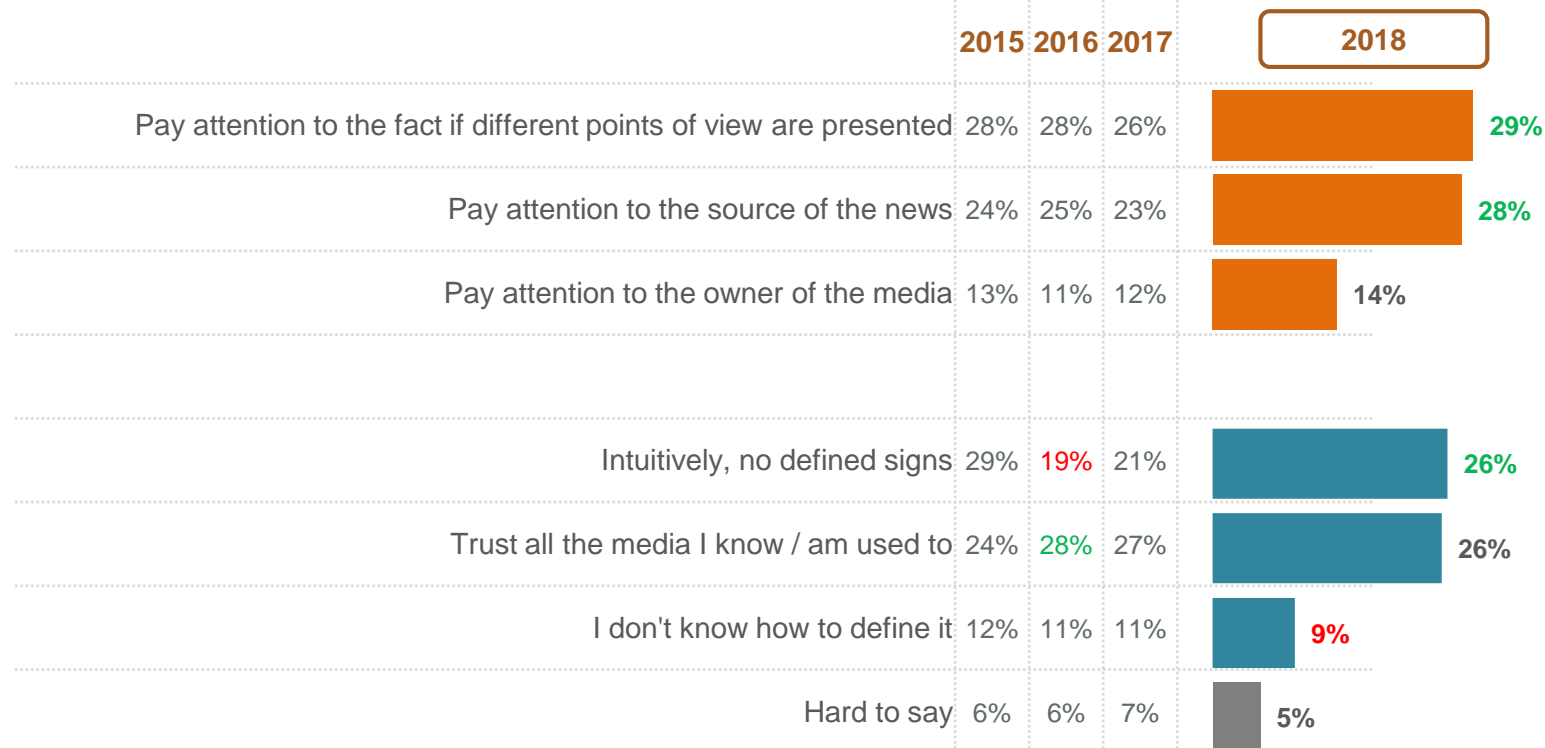
Signs of reliable information

The share of people who critically evaluate the reliability of information (i.e. by analyzing the presentation of different points of view and checking the news source) has increased since last year.

However, there has also been an increase in the number of respondents who evaluated the credibility of media information strictly by their gut instinct.

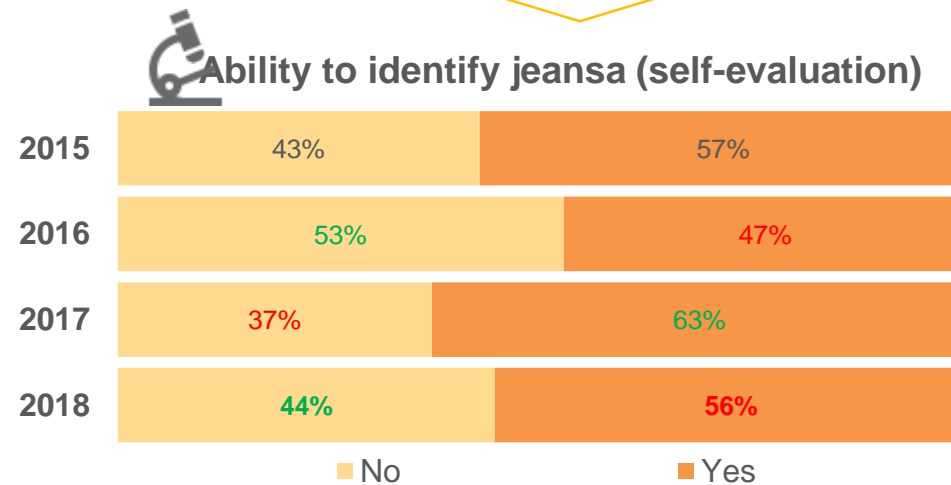
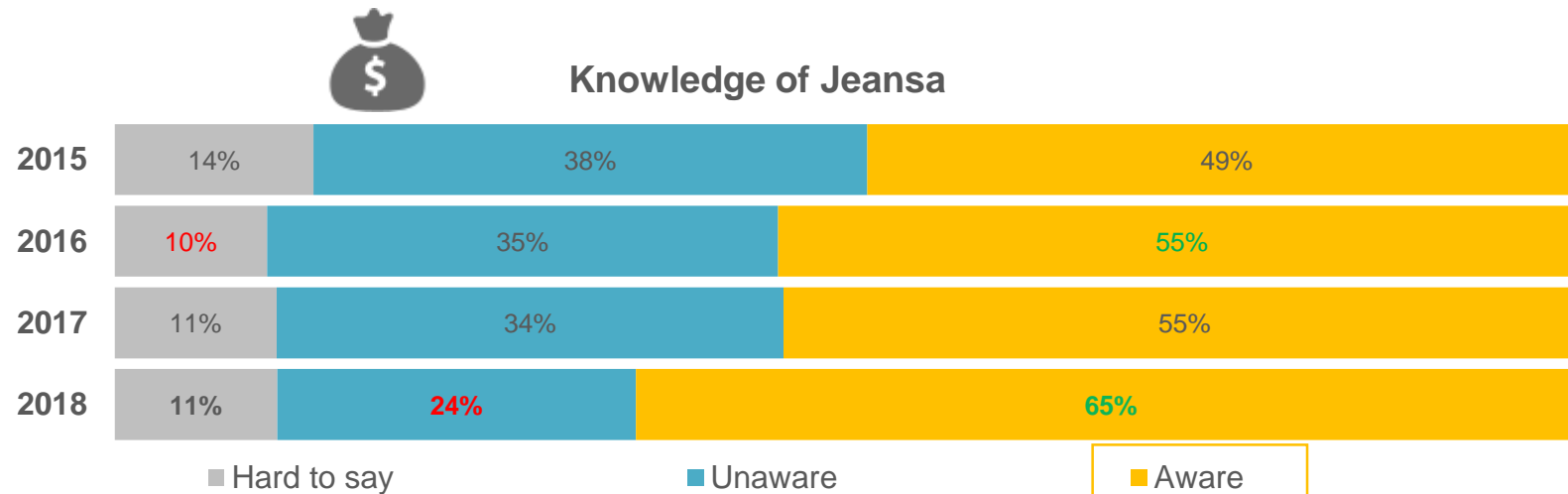
What features do you look for to determine if the media information you see should be trusted?

2015-2018



Jeansa: awareness, ability to distinguish

People became more aware of sponsored materials in the media, but fewer respondents indicated that they could distinguish real news from sponsored content.

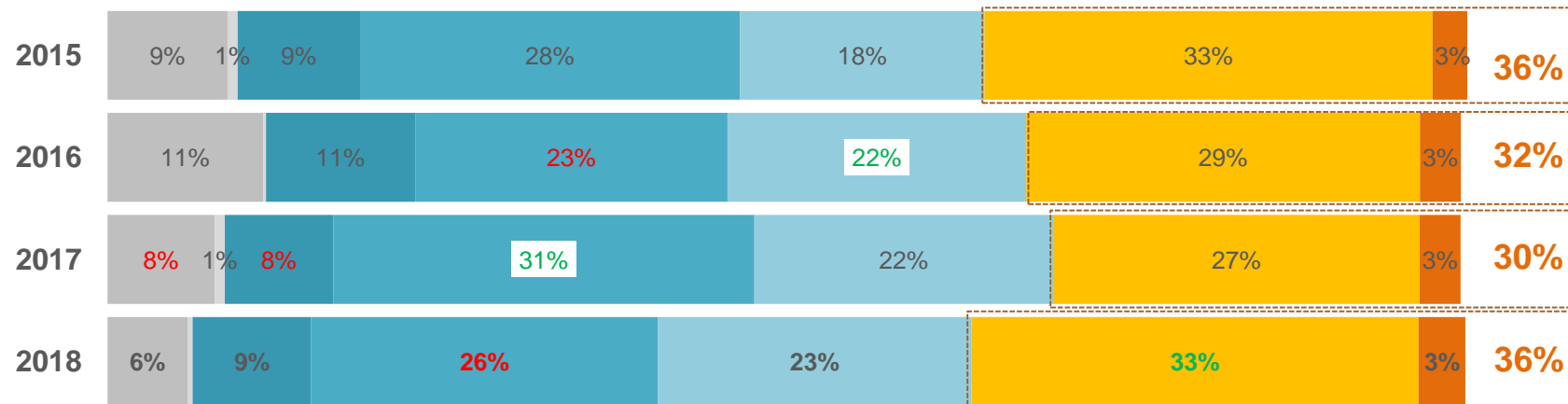


Jeansa: how to fight it.

Compared to the previous year's findings, more respondents agreed that sponsored content had become an important problem. At the same time, many of those who acknowledged the importance of this problem did not have any ideas on how to address it.

Combating the jeansa problem

2015-2018

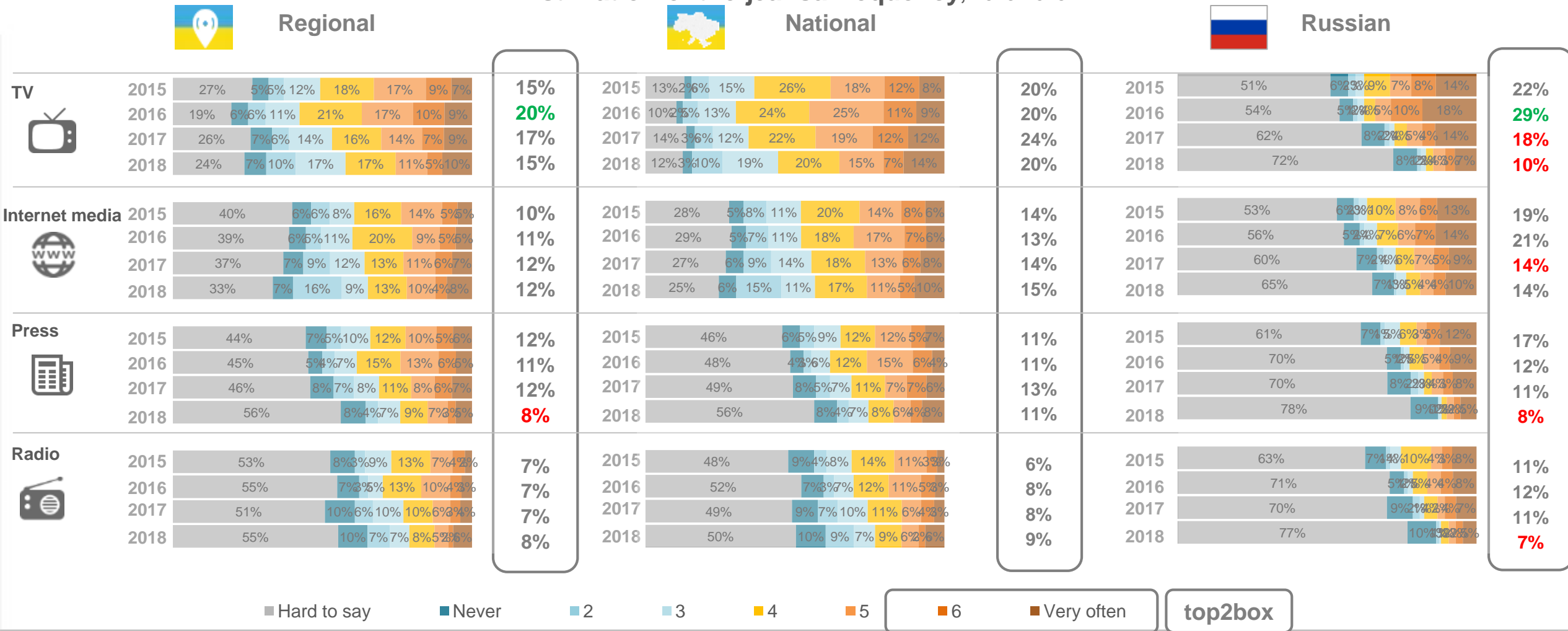


- Hard to say
- Other
- Not actual - I practically do not encounter such materials
- Not actual - I distinguish such materials and skip them
- Not actual - I know about such materials and I admit their right to exist
- Actual - I'm annoyed by this problem, but I do not know how to deal with it
- Actual - I'm annoyed by this problem, and I'm actively combating it

Jeansa. Estimation of the frequency of placement

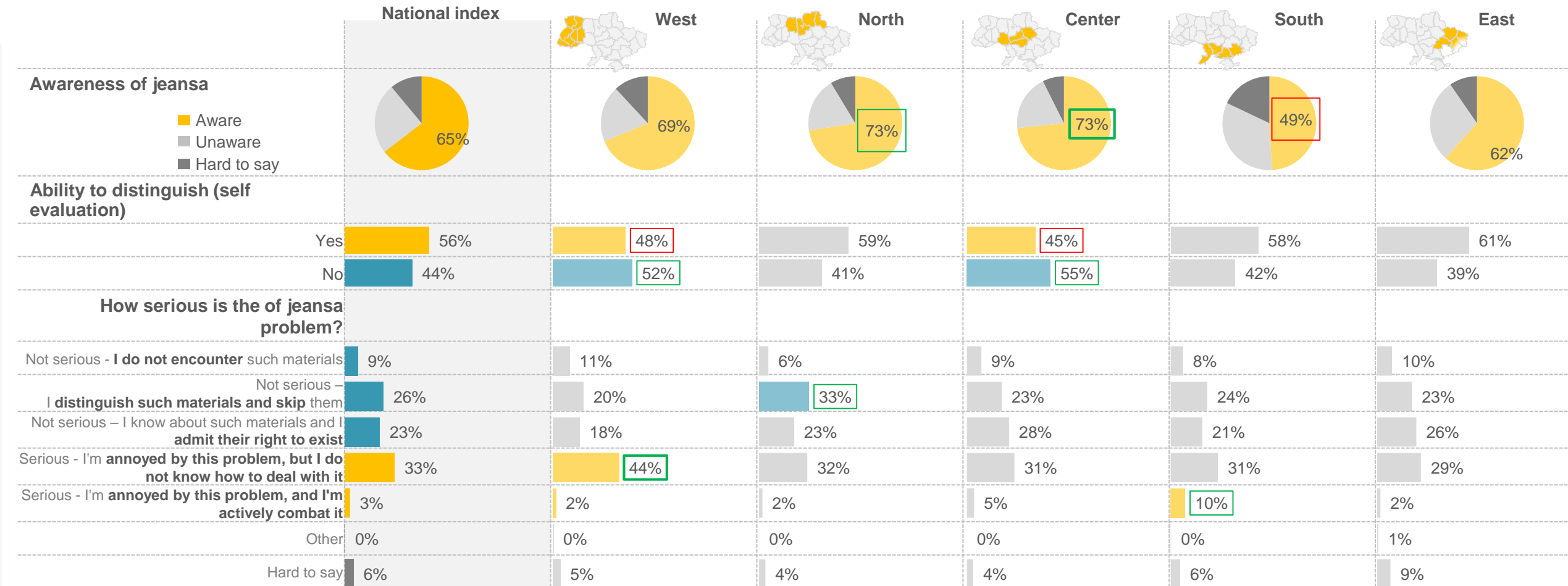
Survey findings consistently show that television is perceived as the main source of sponsored content, if compared to other media types. However, the number of respondents who noticed paid journalism and infomercials in the regional press and Russian media outlets has decreased since last year.

Estimation of the jeansa frequency, 2015-2018



Jeansa: regional differences.

Residents of the northern and central regions of Ukraine were more aware of sponsored content.
The majority of residents in the western and central regions reported being not able to distinguish real news from paid journalism.

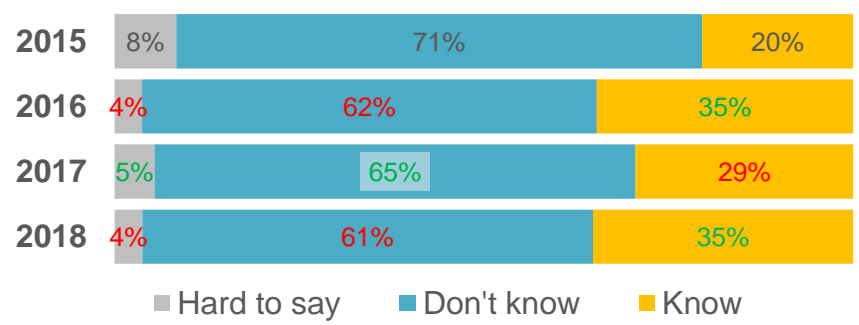


Significantly higher/ lower in comparison to Total (CI 95%)

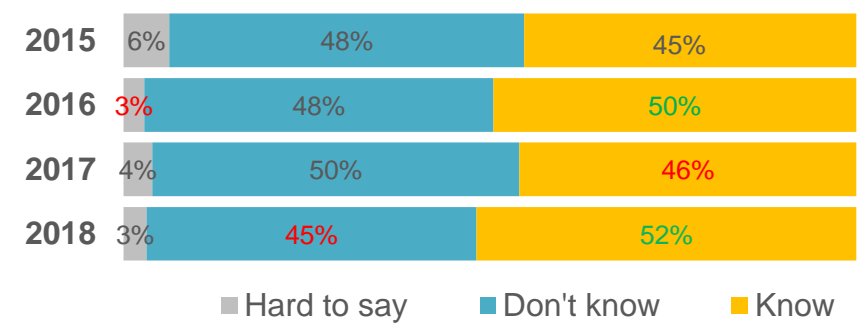
Attitude towards media owners

The survey reveals an increase in the number of respondents who are aware of the owners and those controlling the regional and national media. As before, about a third of respondents believe this information is important.

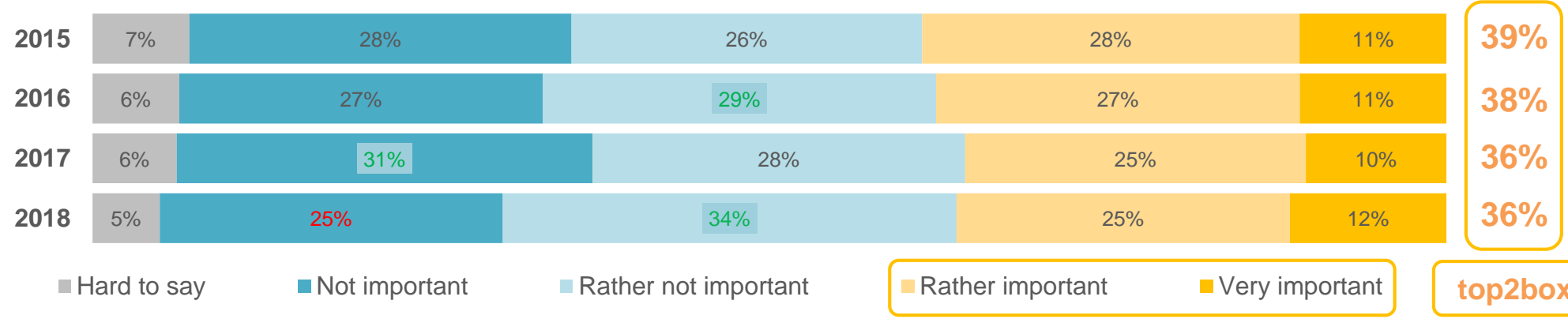
Awareness of owners of local media



Awareness of owners of national TV channels



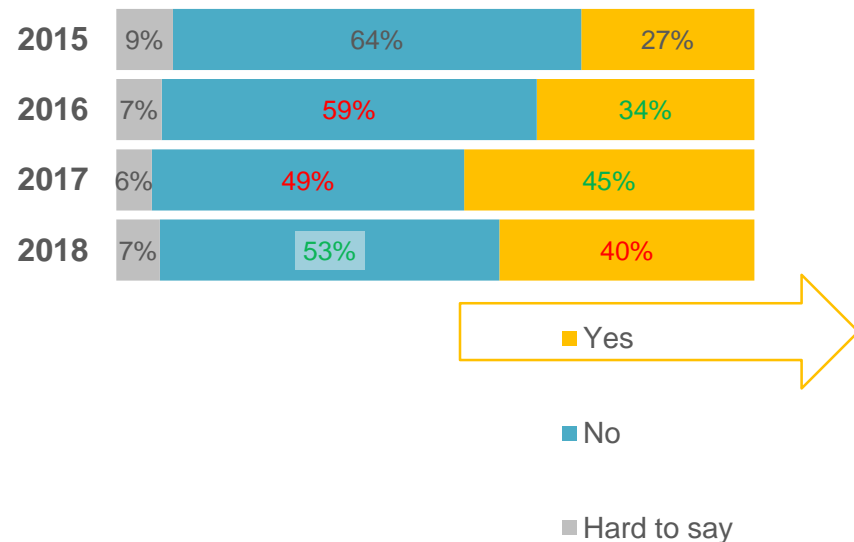
Importance of knowing the media owner



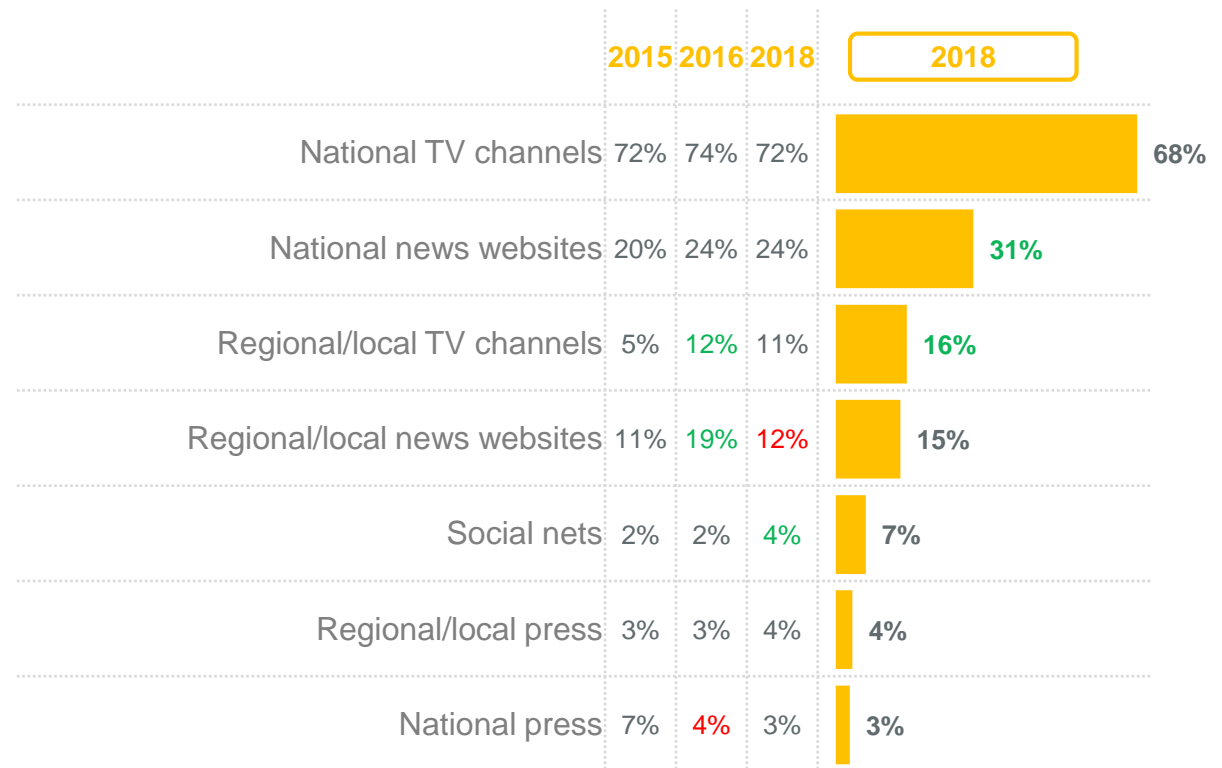
Awareness of investigative journalism

The level of general awareness of investigative journalism, in particular of stories about the income and asset declarations of public officials, decreased slightly this year. Among all respondents who were aware of this type of reporting, they watched investigative journalism programs on TV or read online stories (published on both national and regional news sites).

Did you see journalism investigations of the declarations of the officials during the last month

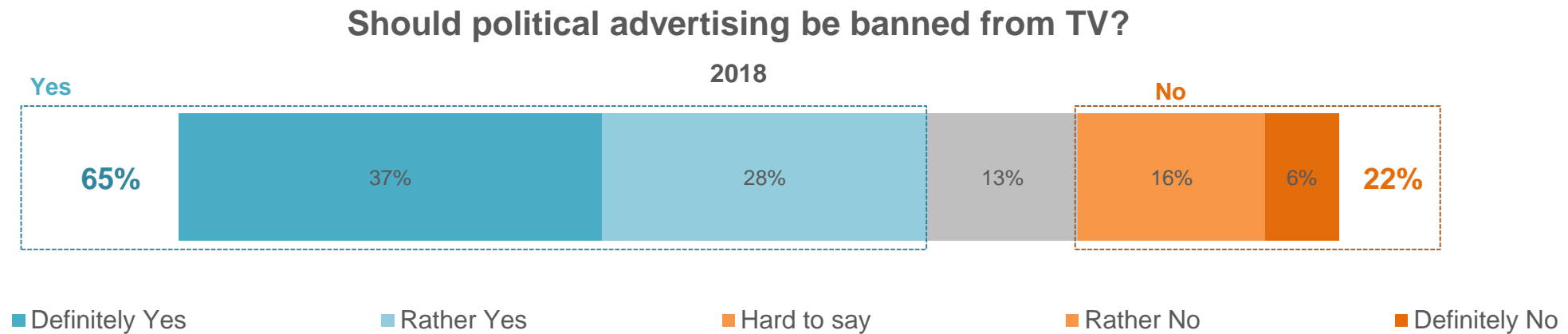


Where did you see them?



Overall attitude towards political advertising in 2018

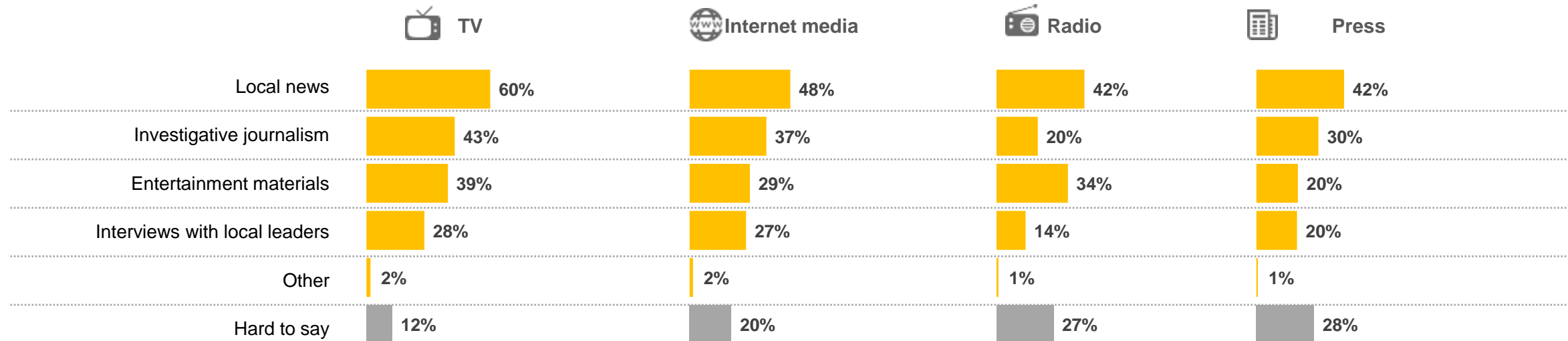
The vast majority of respondents would approve of a political advertising ban on television.



Regional Media Content in 2018

The majority of respondents would like to see more local news in the regional media.
Entertainment programs were rated as the most popular type of the regional radio content.

Which type of content would you like to see in the regional media?






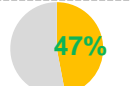
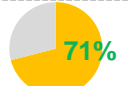
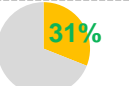
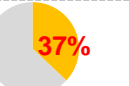
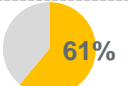



























































REFORMS

Awareness of Reforms

The levels of awareness of decentralization, energy and healthcare reforms have increased since last year. Meanwhile, the level of awareness of land reform has decreased.

	 Decentralization		 Health-care Reform		 Energy Sector Reform		 Land Reform		 Retirement Reform	
	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018
Have you seen/heard/read any materials covering this reform in the last 30 days?	40%	 47%	49%	 71%	28%	 31%	43%	 37%	61%	 61%
Where exactly did you find information about the reforms?	<div> <div></div> Yes, I have <div></div> No, I haven't </div>									
National TV channels	74%	 72%	75%	 69%	73%	 68%	75%	 67%	75%	 73%
National news sites	25%	 30%	24%	 30%	24%	 29%	22%	 30%	23%	 30%
Regional / local TV channels	18%	 21%	17%	 21%	13%	 14%	12%	 17%	16%	 22%
Regional news sites	10%	 16%	10%	 17%	9%	 15%	8%	 12%	9%	 16%
Social networks	3%	 6%	3%	 6%	3%	 6%	2%	 6%	3%	 5%
Regional / local print media	8%	 6%	7%	 5%	5%	 6%	6%	 6%	7%	 7%
National print media	4%	 5%	5%	 5%	4%	 5%	5%	 4%	5%	 7%
Is the media coverage of reforms sufficient?										
Insufficient	41%	 35%	54%	 44%	50%	 45%	54%	 50%	52%	 44%
Sufficient	46%	 55%	36%	 45%	35%	 44%	32%	 40%	36%	 43%
Too much	5%	 4%	2%	 5%	5%	 3%	4%	 2%	4%	 5%
Hard to tell	8%	 6%	7%	 5%	10%	 8%	9%	 7%	7%	 7%

Demographic profile of those asked about their awareness of reforms 2018

Young Ukrainians are barely aware of the progress in the implementation of key reforms.

			Decentralization	Health-care Reform	Energy Sector Reform	Land Reform	Retirement Reform
Have heard about reform	Total						
		N=1643	N=771	N=1169	N=515	N=604	N=999
Gender	Male	46%	49%	44%	49%	48%	46%
	Female	54%	51%	56%	51%	52%	54%
Age	18-25	13%	8%	10%	8%	9%	8%
	26-35	27%	26%	25%	24%	24%	22%
	36-45	23%	23%	24%	22%	21%	23%
	46-54	18%	22%	20%	22%	23%	22%
	55-65	19%	21%	21%	23%	23%	25%
Education	Incomplete secondary	1%	1%	0%	0%	1%	1%
	Secondary	13%	12%	13%	13%	13%	14%
	Secondary special	41%	40%	42%	37%	38%	41%
	Incomplete higher	7%	5%	6%	5%	5%	5%
	Higher	38%	42%	39%	44%	44%	40%

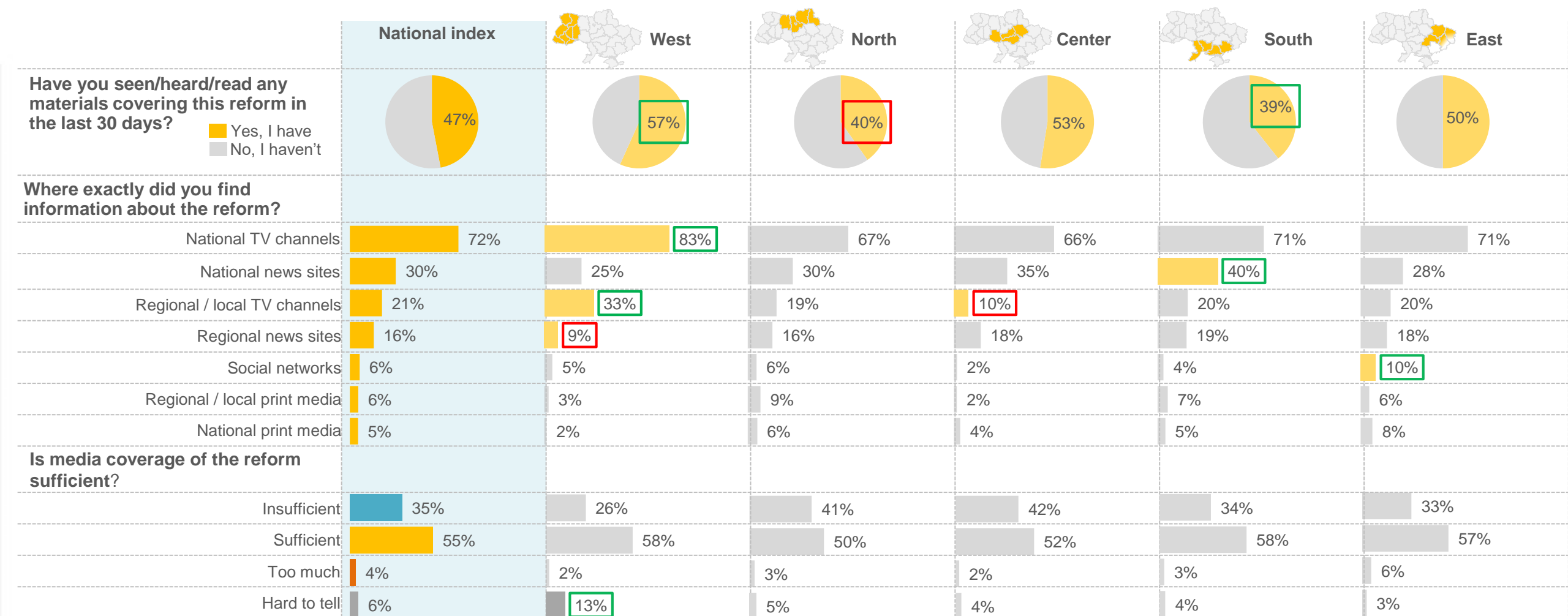
Significantly higher/ lower in comparison to Total (CI 95%)

Questions 1. Have you seen/heard/read any print or video materials covering these reforms in the last 30 days?

Base: Respondents who have seen/heard/read the particular reform media coverage, N=771, 1169, 516, 604, 999

Decentralization: regional differences 2018

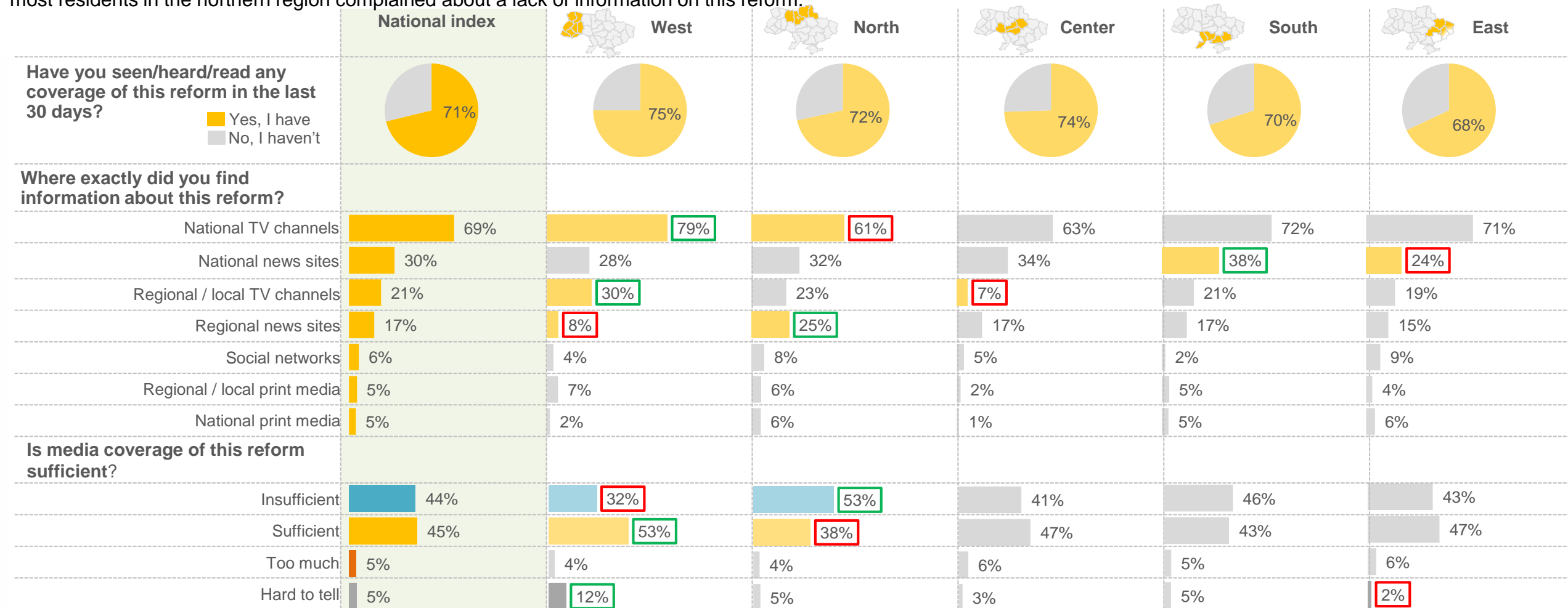
Residents of western and southern regions were more aware of reforms, while the study recorded a lower level of public awareness in the northern region. People in the western region of Ukraine received more information on decentralization reform, mainly from the national and local TV channels.



Significantly higher / lower in comparison to National index (CI:95%)

Health Care Reform: regional differences 2018

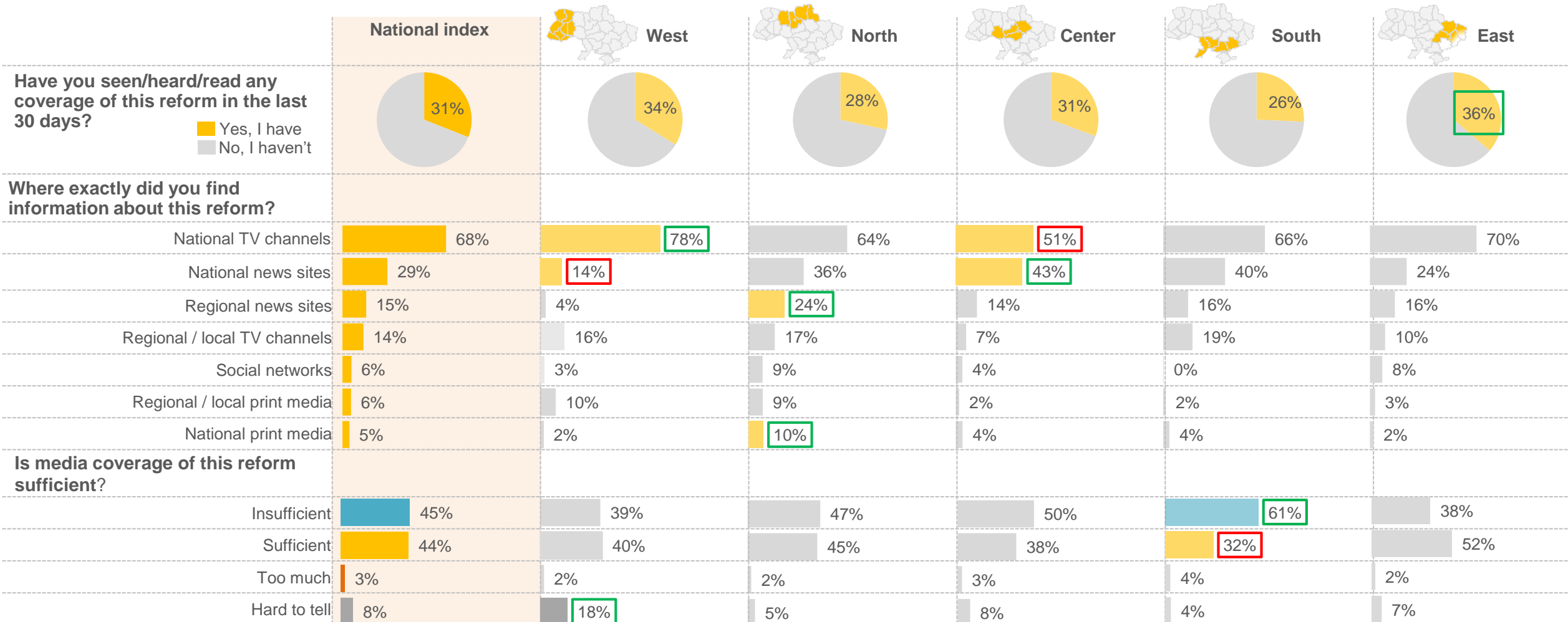
TV channels (both national and regional) constitute the main source of information on this reform for residents of the western region. In the North, more people learned about this reform from local digital media outlets. The majority of respondents from the western oblasts confirmed having a sufficient amount of information on healthcare reform. By contrast, most residents in the northern region complained about a lack of information on this reform.



Significantly higher / lower in comparison to National index (CI:95%)

Energy Sector Reform: regional differences 2018

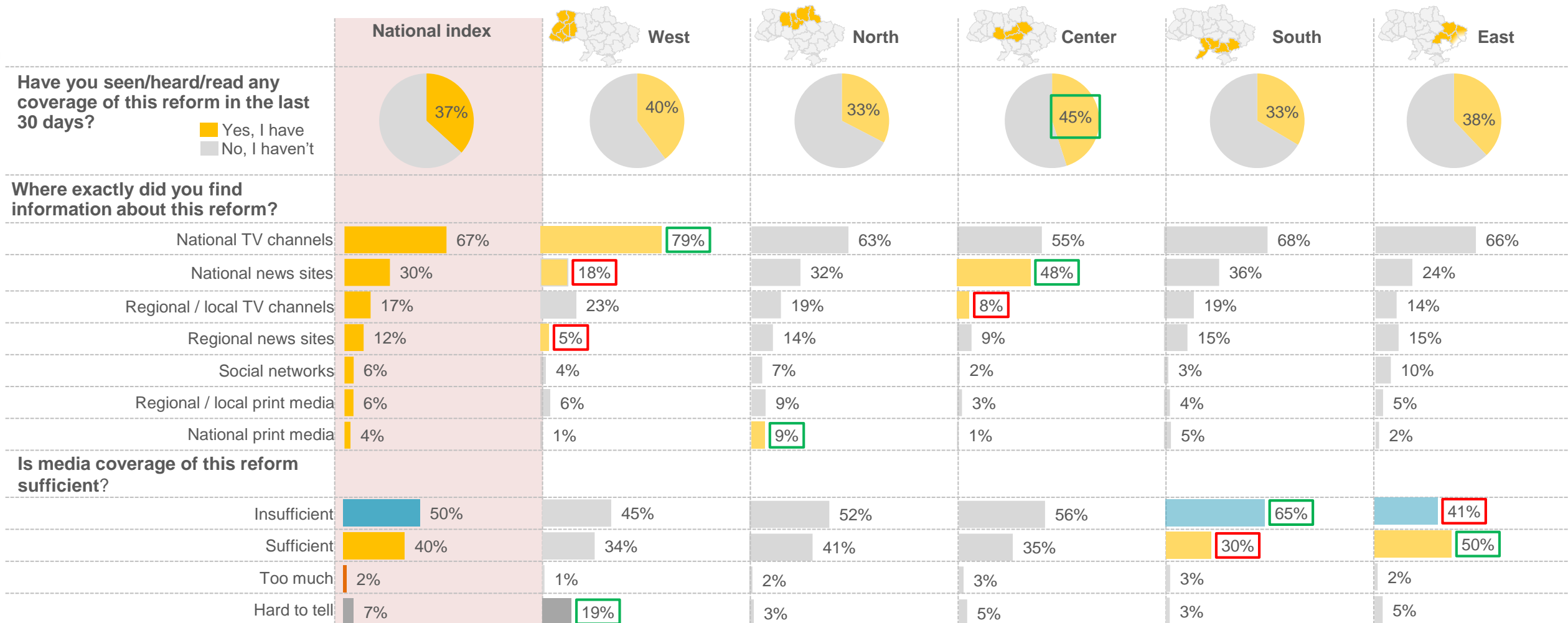
Residents of the eastern region displayed the highest level of awareness of this reform among all regions of Ukraine.
The majority of respondents from the southern region reported a lack of information on energy reform.



Significantly higher / lower in comparison to National index (CI:95%)

Land Reform: regional differences 2018

The population of the central region demonstrated the highest level of awareness of land reform.

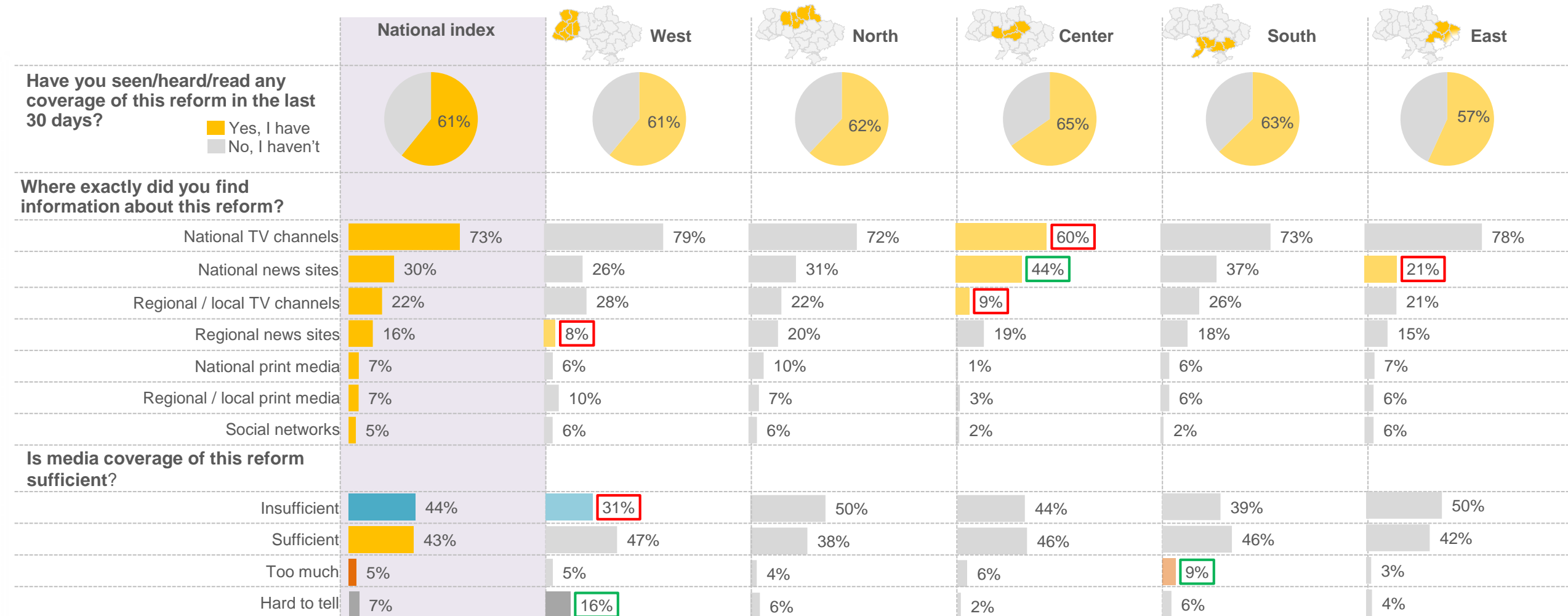


Significantly higher / lower in comparison to National index (CI:95%)



Retirement Reform: regional differences 2018

As with other reforms, national digital media is the main source of information about this reform for residents of the central region, while respondents from the western region rarely mentioned this media type as a source of news about the reform.



Significantly higher / lower in comparison to National index (CI:95%)



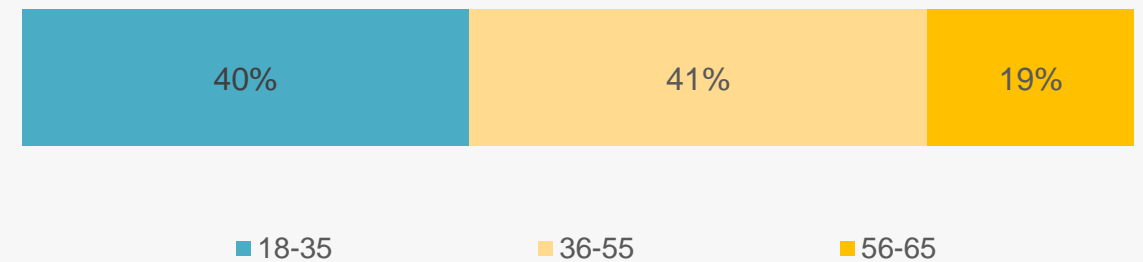
SOCIAL- DEMOGRAPHIC PROFILE

Social-demographic profile. 2018

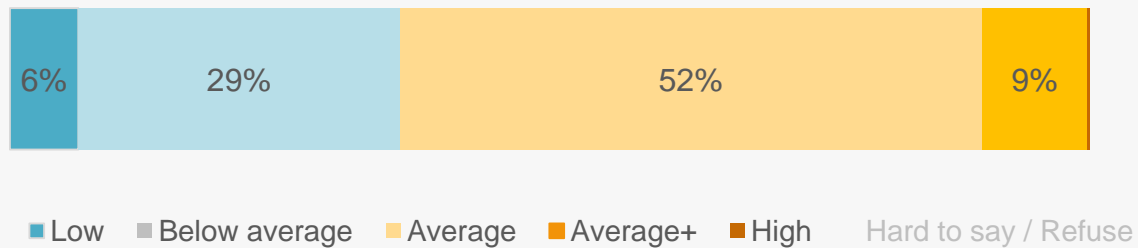
Gender



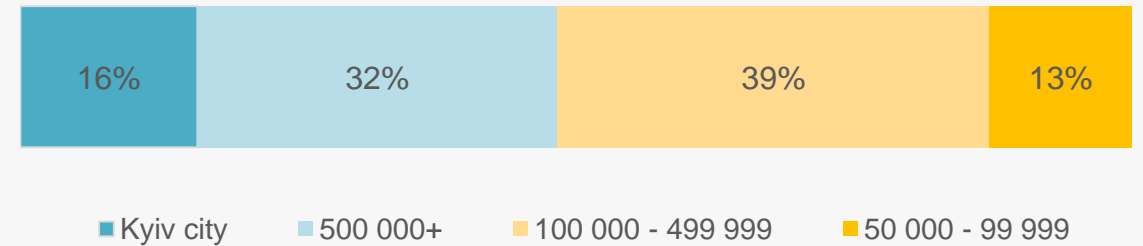
Age



Income

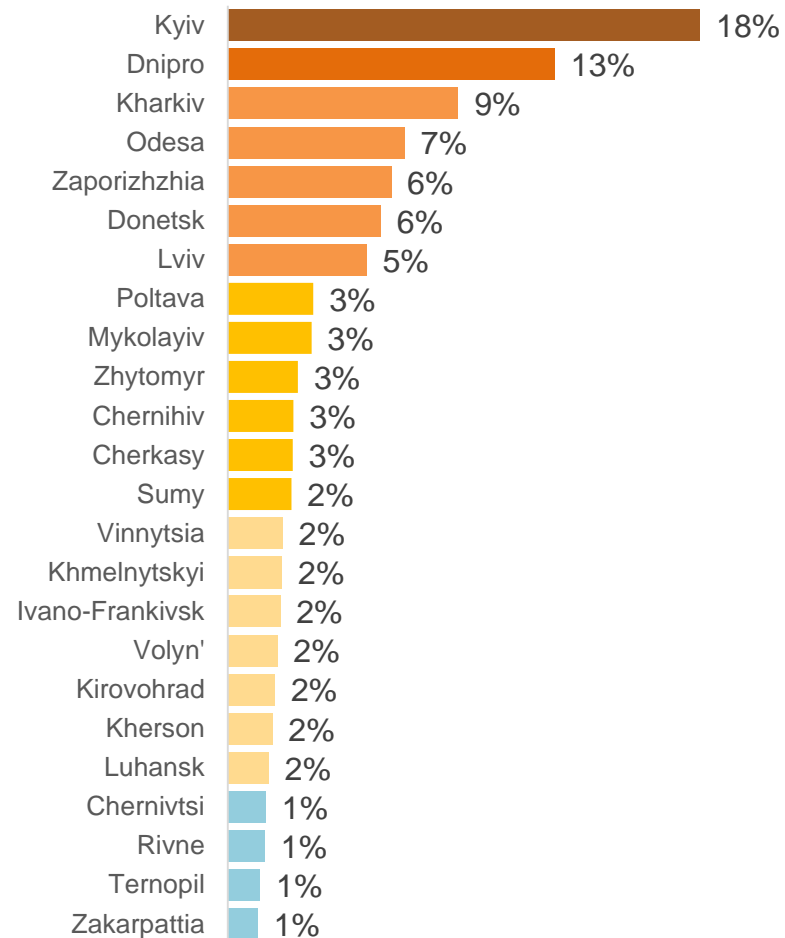


Settlement type



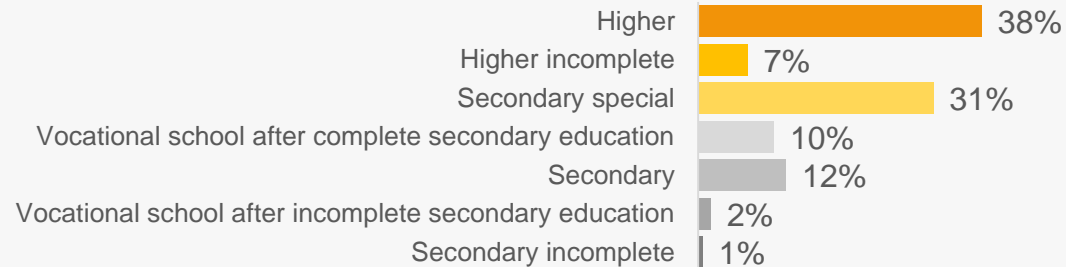
Social-demographic profile. 2018

Region

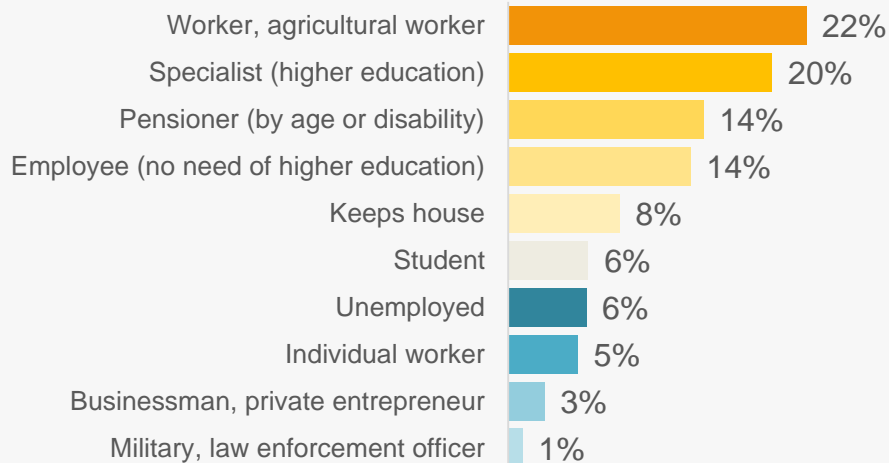


Social-demographic profile. 2018

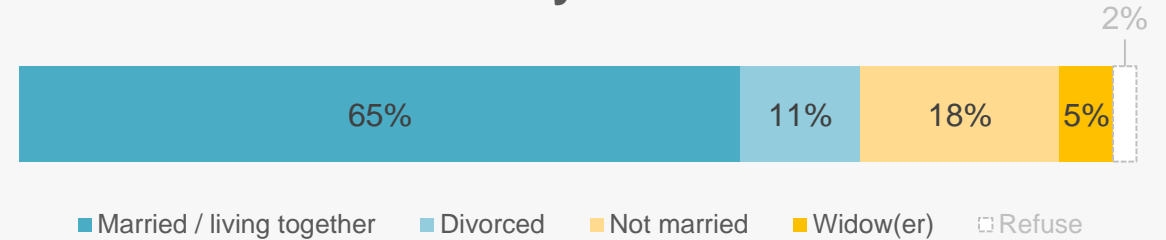
Education



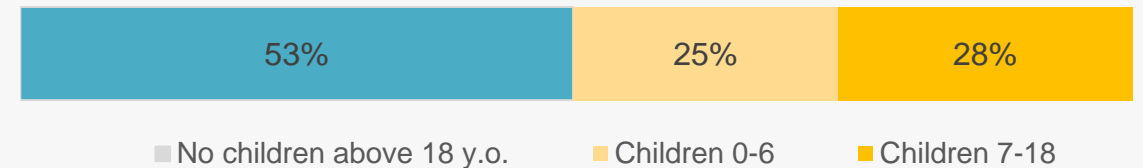
Job



Family status



Children



Size of the household

