

Media consumption and political preferences in 8 oblasts of East and South of Ukraine

Prepared by GfK Ukraine for UCBI



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Methodology and sample







About 1500 face-to-face interviews at respondent's home were conducted in each oblast of government-controlled territories not including booster samples (the data for the areas and settlements where booster samples were conducted is provided in separate presentation for each oblast). Also 426 interview method mobile CATI were conducted on non-government controlled areas (NGCA) in Donetsk and Lugansk regions.

The Sample represents the population of each oblast by age/gender/settlement size according to the data of State Statistics Service of Ukraine as of 1/01/2015 for the 1st wave and 1/01/2016 for the 2nd wave, 1/01/2014 for NGCA.

The sample error does not exceed 1% for the total sample and 2,5% for each oblast with probability 0.95.

Objective: To study media preferences and political orientations of the population of 8 oblasts in Ukraine.

Geography: Dnipropetrovska, Donetska (GCA), Donetska (NGCA), Zaporizka, Luhanska (GCA), Luhanska (NGCA), Mykolaivska*, Odeska, Kharkivska, Khersonska* oblasts

Fieldwork:

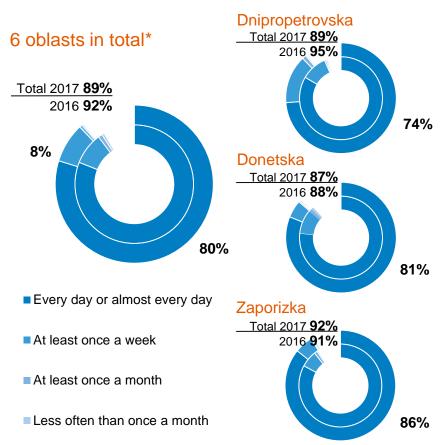
1st wave 13 830 respondents November 27, 2015 – January 10, 2016 2nd wave 15 103 respondents January 20 – March 5, 2017

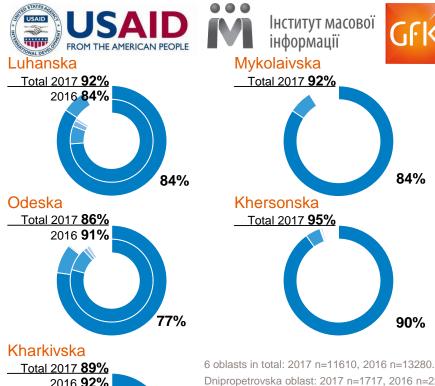
*The survey wasn't conducted in Mykolaivska and Khersonska oblasts during the first wave.

Media usage by oblast



Television: media usage







Khersonska oblast*: 2017 n=1538.

*In 2016 the survey wasn't conducted in Mykolaivska and Khersonska oblasts

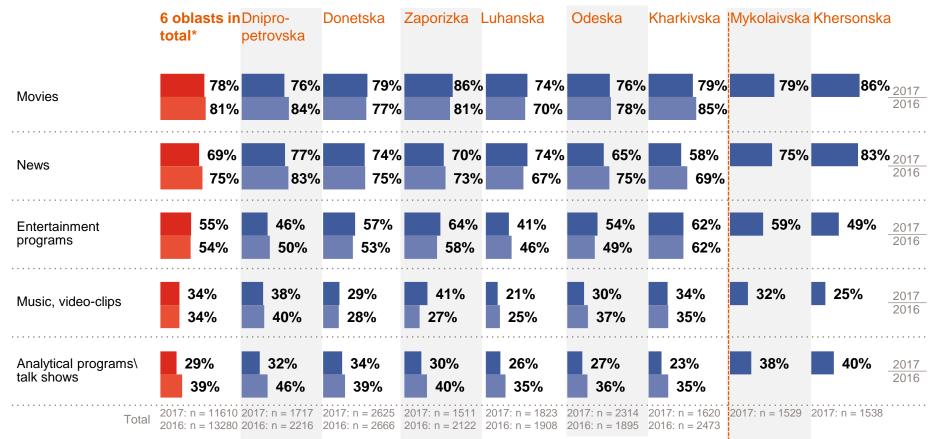












Television: how people get TV









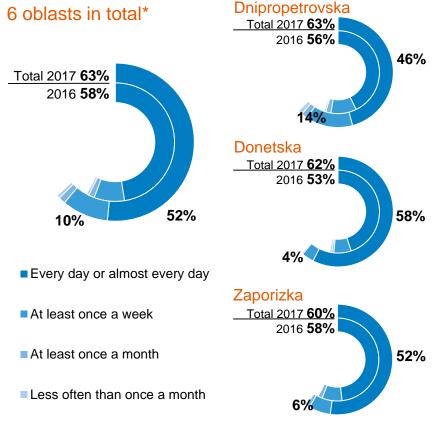
	8 oblasts in total*	nDnipro- petrovska	Donetska	Zaporizka	Luhanska	Odeska	Kharkivska	Mykolaivska	a Kherso	nska
Cable TV	37% 38%	36% 29%	56% 51%	22% 28%	36% 34%	30% 42%	44% 42%	31%	31%	6 2017 2016
Digital broadcasting T2 (via decoder)	15% 13%	21% 21%	8% 9%	24% 16%	14% 6%	16% 9%	7% 7%	13%	13%	2017
Analogue broadcasting (regular antenna)	20% 27%	17% 34%	12% 19%	30% 24%	16% 24%	18% 21%	25% 29%	25%	25%	2017 2016
Satellite (free of charge)	16% 15%	16% 12%	9% 10%	17% 24%	26% 17%	21% 16%	12% 16%	23%	23%	2017 2016
Satellite (paid packages of services)	1% 1%	1% 2%	1% 0%	1% 1%	1% 1%	1% 1%	1% 1%	1%	1%	2017
MMDS (services like Maximum TV, Mitris, Teleselo)	0% 0%	0% 0%	1% 0%	0% 0%	0% 0%	0% 0%	0% 0%	0%	0%	2017
Internet-TV (via TV tuner)	1% 1%	1% 1%	1% 1%	1% 1%	1% 0%	1% 1%	0% 0%	1%	1%	2017
Total		2017: n = 1717 2016: n = 2216	2017: n = 2625 2016: n = 2666	2017: n = 1511 2016: n = 2122	2017: n = 1823 2016: n = 1908	2017: n = 2314 2016: n = 1895	2017: n = 1620 2016: n = 2473	2017: n = 1529	2017: n =	1538

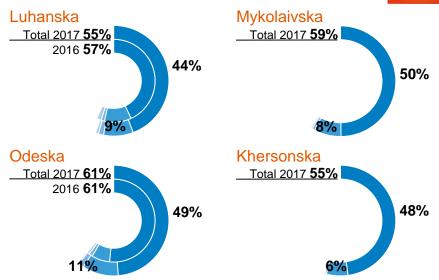
Internet: media usage













6 oblasts in total: 2017 n=11610, 2016 n=13280.

Dnipropetrovska oblast: 2017 n=1717, 2016 n=2216.

Donetska oblast: 2017 n=2625, 2016 n=2666.

Zaporizka oblast: 2017 n=1511, 2016 n=2122,

Luhanska oblast: 2017 n=1823, 2016 n=1908.

Odeska oblast: 2017 n=2314, 2016 n=1895.

Kharkivska oblast: 2017 n=1620, 2016 n=2473.

Mykolaivska oblast*: 2017 n=1529. Khersonska oblast*: 2017 n=1538.

^{*}In 2016 the survey wasn`t conducted in Mykolaivska and Khersonska oblasts









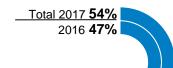


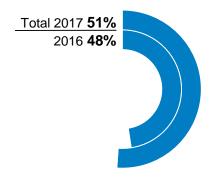
	6 oblasts in Dnip total* petro	Donetska ovska	Zaporizka	Luhanska	Odeska	Kharkivska	Mykolaivska	Khersonska	a
To watch video such as TV programs etc.		37% 37% 37% 37%	40% 39%	26% 23%	36% 33%	36% 33%	24%	23%	2017 2016
To communicate via Skype or other communicators		28% 31% 7% 26%	26% 20%	26% 20%	37% 30%	43% 30%	30%	17%	2017
To find out the latest news		33% 39% 36% 29%	26% 29%	31% 31%	26% 33%	30% 37%	32%	27%	<u>2017</u> 2016
Receive or send e-mai		30% 26% 30% 21%	20% 24%	24% 22%	27% 33%	41% 33%	25%	17%	2017
To learn about a specif		2% 30% 24% 20%	28% 20%	19% 20%	22% 21%	35% 28%	26%	27%	2017 2016
To play games or other		24% 18% 0% 21%	21% 16%	16% 12%	18% 17%	23% 15%	11%	12%	2017
To listen to or watch a podcast		24% 20% 5% 20%	23% 20%	20% 14%	17% 21%	15% 24%	13%	13%	2017
Total	2017: n = 11610 2017: 2016: n = 13280 2016:			2017: n = 1823 2016: n = 1908 2016 the survey	2017: n = 2314 2016: n = 1895 wasn t conducted	2017: n = 1620 2016: n = 2473 I in Mykolaivska a	2017: n = 1529 and Khersonska	2017: n = 1538	

Social media: media usage

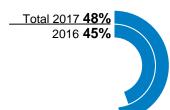
6 oblasts in total*





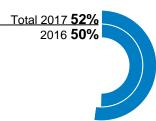


Donetska



Have at least one account at social media sites

Zaporizka

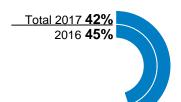


*In 2016 the survey wasn't conducted in Mykolaivska and Khersonska oblasts © GfK April 27, 2017 | Media Poll



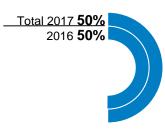








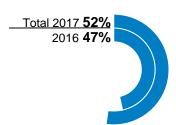
Odeska



Khersonska



Kharkivska



6 oblasts in total: 2017 n=11610, 2016 n=13280. Dnipropetrovska oblast: 2017 n=1717, 2016 n=2216.

Donetska oblast: 2017 n=2625, 2016 n=2666. Zaporizka oblast: 2017 n=1511, 2016 n=2122,

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Kharkivska oblast: 2017 n=1620, 2016 n=2473.

Mykolaivska oblast*: 2017 n=1529. Khersonska oblast*: 2017 n=1538.

Social media: accounts at social media sites







	6 oblasts in total*	Dnipro- petrovska	Donetska	Zaporizka	Luhanska	Odeska	Kharkivska	Mykolaiv- ska	Khersonsk	a
Vkontakte	39% 37%	43% 38%	35% 33%	40% 39%	27% 32%	39% 39%	39% 36%	32%	32%	2017
Odnoklassniki	32% 33%	38% 35%	35% 31%	37% 40%	30% 26%	30% 33%	24% 30%	30%	28%	2017
Facebook	19% 14%	23% 14%	15% 12%	13% 11%	11% 8%	18% 16%	24% 15%	13%	10%	2017
Instagram	8% 4%	9% 3%	5% 3%	5% 6%	2% 2%	10% 6%	10% 2%	2%	3%	2017
Twitter	5% 4%	6% 5%	5% 5%	3% 2%	1% 2%	6% 5%	4% 3%	2%	3%	2017
LinkedIn	0,6% 0,6%	0,4% 0,5%	0,2% 0,2%	0,7% 0,9%	0,1% 0,7%	1,5% 0,7%	0,6% 0,6%	0,2%	0,0%	2017
LiveJournal	0,5% 0,4%	0,3% 0,2%	0,2% 0,1%	0,6% 0,4%	0,0% 0,7%	1,1% 0,5%	0,6% 0,8%	0,2%	0,5%	2017
	Total 2017: n = 11610 2016: n = 13280	2017: n = 1717 2016: n = 2216	2017: n = 2625 2016: n = 2666	2017: n = 1511 2016: n = 2122	2017: n = 1823 2016: n = 1908	2017: n = 2314 2016: n = 1895	2017: n = 1620 2016: n = 2473	2017: n = 1529	2017: n = 1538	





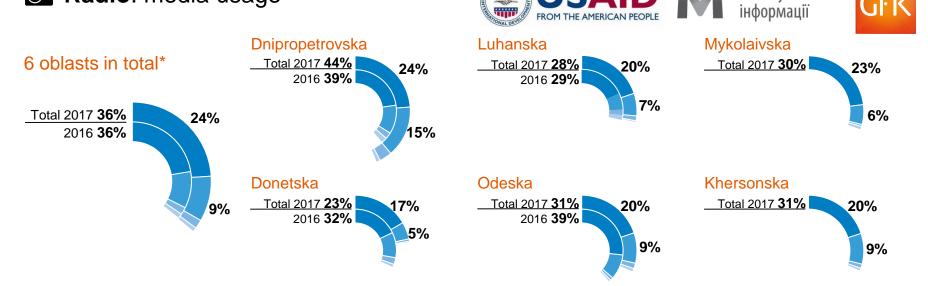


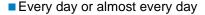




	6 oblasts in total*	Dnipro- petrovska	Donetska	Zaporizka	Luhanska	Odeska	Kharkivska	Mykolaiv- ska	Khersons	ka
Following my friend's timelines	36% 32%	37% 31%	38% 33%	41% 38%	26% 24%	34% 32%	36% 32%	32%	27%	2017
Sharing news about myself / family	29% 28%	30% 30%	28% 23%	38% 31%	19% 21%	28% 28%	27% 29%	28%	22%	2017
Sharing links to news and information I find interesting	24% 21%	19% 17%	24% 19%	34% 28%	16% 22%	20% 20%	27% 21%	18%	23%	2017 2016
Sharing entertaining stories, videos	19% 17%	16% 13%	19% 15%	31% 21%	10% 14%	17% 19%	18% 19%	12%	17%	2017
Following news agencies\informational resources timelines	9% 6%	6% 4%	12% 3%	9% 8%	6% 12%	8% 3%	11% 10%	1 7%	8%	2017
Following popular bloggers / politicians timelines	7% 6%	9% 8%	4% 4%	11% 7%	6% 4%	7% 7%	6% 6%	 6%	3%	<u>2017</u> 2016
Following celebrities' timelines	5% 4%	6% 4%	3% 3%	7% 4%	1% 1%	6% 3%	3% 4%	4%	1%	2017
Total	2017: n = 11610 2016: n = 13280	2017: n = 1717 2016: n = 2216		2017: n = 1511 2016: n = 2122 *In	2017: n = 1823 2016: n = 1908 2016 the survey	2017: n = 2314 2016: n = 1895 wasn t conducte	2017: n = 1620 2016: n = 2473 d in Mykolaivska a	2017: n = 1529 and Khersonska	2017: n = 153	8

Radio: media usage





At least once a week

At least once a month

Less often than once a month

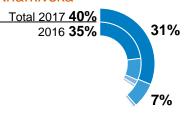
Zaporizka Kharkivska

27%

7%

Total 2017 38%

2016 35%



6 oblasts in total: 2017 n=11610, 2016 n=13280. Dnipropetrovska oblast: 2017 n=1717, 2016 n=2216.

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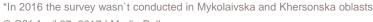
Donetska oblast: 2017 n=2625, 2016 n=2666. Zaporizka oblast: 2017 n=1511, 2016 n=2122, Luhanska oblast: 2017 n=1823, 2016 n=1908.

Odeska oblast: 2017 n=2314, 2016 n=1895.

Kharkivska oblast: 2017 n=1620, 2016 n=2473.

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Mykolaivska oblast*: 2017 n=1529. Khersonska oblast*: 2017 n=1538.











	6 oblasts in total*	Dnipro- petrovska	Donetska	Zaporizka	Luhanska	Odeska	Kharkivska	Mykolaiv- ska	Khersonsk	ка
Music	32% 32%	40% 35%	21% 29%	26% 32%	21% 20%	29% 36%	35% 30%	27%	26%	<u>2017</u> 2016
News	21% 21%	28% 27%	11% 14%	34% 23%	20% 15%	16% 23%	21% 19%	20%	14%	<u>2017</u> 2016
Entertainment programs	10% 9%	16% 10%	4% 5%	15% 7%	6% 6%	7% 11%	9% 12%	6%	4%	<u>2017</u> 2016
Analytical programs / talk shows	4% 4%	7% 4%	2% 2%	8% 4%	3% 2%	2% 5%	3% 4%	3%	4%	2017 2016
Total	2017: n = 11610 2016: n = 13280		2017: n = 2625 2016: n = 2666	2017: n = 1511 2016: n = 2122	2017: n = 1823 2016: n = 1908	2017: n = 2314 2016: n = 1895		2017: n = 1529	2017: n = 153	8

Printed media: media usage







6 oblasts in total*

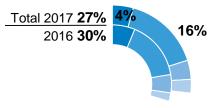


Luhanska



Mykolaivska





Donetska



Odeska



Khersonska



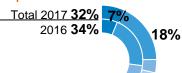
Every day or almost every day

At least once a week

At least once a month

Less often than once a month

Zaporizka



Kharkivska



6 oblasts in total: 2017 n=11610, 2016 n=13280.

Dnipropetrovska oblast: 2017 n=1717, 2016 n=2216.

Donetska oblast: 2017 n=2625, 2016 n=2666. Zaporizka oblast: 2017 n=1511, 2016 n=2122,

Luhanska oblast: 2017 n=1823, 2016 n=1908.

Odeska oblast: 2017 n=2314, 2016 n=1895. Kharkivska oblast: 2017 n=1620, 2016 n=2473.

Mykolaivska oblast*: 2017 n=1529.

Khersonska oblast*: 2017 n=1538.

*In 2016 the survey wasn't conducted in Mykolaivska and Khersonska oblasts © GfK April 27, 2017 | Media Poll

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Printed media: used for









	6 oblasts in Dnip total* petr	pro- Donetska rovska	Zaporizka	Luhanska	Odeska	Kharkivska	Mykolaiv- ska	Khersonska	a
News	19% 23%	24% 22% 28% 22%	25% 29%	21% 19%	13% 21%	12% 18%	22%	34%	2017 2016
Entertainment materials	13% 14 12% 12	4% 12% 2% 9%	19% 17%	8% 7%	7% 9%	15% 14%	10%	14%	2017 2016
Announcements, ad	12% 12% 12% 14% 14% 14% 14% 14% 14% 14% 14% 14% 14	2% 15% 4% 14%	17% 18%	12% 11%	10% 13%	7% 10%	17%	24%	2017 2016
Analytical materials	7% 99 10% 1	% 8% 9%	11% 13%	4% 5%	3% 10%	6% 7%	10%	17%	2017
Tota	2017: n = 11610 2017: 2016: n = 13280 2016:	7: n = 1717 2017: n = 2629 3: n = 2216 2016: n = 2669		2017: n = 1823 2016: n = 1908		2017: n = 1620 2016: n = 2473	2017: n = 1529	2017: n = 1538	

Primary sources of news and topics of interest

Primary sources of news







What is your primary media source for receiving news?

	6 oblasts in total*	Dnipro- petrovska	Donetska	Zaporizka	Luhanska	Odeska	Kharkivska	Mykolaiv- ska	Khersonsk	a
All-Ukrainian television	56% 55%	59% 62%	49% 53%	69% 62%	64% 46%	61% 52%	41% 50%	69%	58%	2017
Ukrainian Internet sites	11% 13%	10% 14%	11% 11%	7% 10%	10% 10%	9% 14%	15% 13%	11%	6%	2017
Social networking sites	8% 7%	10% 5%	9% 8%	10% 8%	6% 13%	5% 4%	8% 8%	5%	5%	2017
Local television	4% 6%	6% 7%	5% 8%	4% 4%	3% 2%	2% 6%	4% 6%	3%	1%	2017 2016
Radio	3% 2%	5% 1%	1% 1%	5% 3%	5% 2%	2% 4%	3% 2%	2%	1%	2017 2016
Printed media	3% 3%	3% 3%	3% 2%	4% 4%	5% 4%	2% 4%	3% 2%	1%	5%	2017 2016
Local Internet sites	3% 2%	3% 2%	3% 2%	1% 2%	3% 2%	4% 2%	1% 1%	3%	1%	2017 2016
Friends and relatives, neighbors, colleagues	2% 1%	1% 1%	1% 2%	2% 0,2%	2% 4%	0,5% 2%	3% 1%	0,4%	1%	2017 2016
Russian television	1% 1%	1% 0,3%	2% 3%	1% 1%	2% 3%	1% 2%	2% 1%	1%	2%	2017 2016
Russian Internet sites	1% 1%	1% 1%	1% 0,3%	0,3% 0,4%	0,3% 2%	1% 1%	1% 1%	1%	0,3%	2017
Total	2017: n = 11610 2016: n = 13280	2017: n = 1717	2017: n = 2625 2016: n = 2666	2017: n = 1511 2016: n = 2122	2017: n = 1823 2016: n = 1908	2017: n = 2314 2016: n = 1895	2017: n = 1620 2016: n = 2473	2017: n = 1529	2017: n = 1538	

TOP-7* topics of interest









What topic are you most interested in?

	Weather	National politics	News about your city/ oblast	The war on the East of Ukraine	Health & healthcare	Lifestyle and entertainment	Local politics
Total 8 oblast (n=14677)	35%	32%	31%	31%	29%	27%	27%
Dnipropetrovska (n=1717)	31%	37%	37%	37%	24%	23%	29%
Donetska (n=2625)	28%	28%	36%	36%	24%	23%	27%
Zaporizka (n=1511)	43%	31%	35%	23%	28%	26%	27%
Luhanska (n=1823)	31%	33%	27%	29%	29%	20%	26%
Odeska (n=2314)	32%	26%	28%	28%	32%	29%	23%
Kharkivska (n=1620)	39%	27%	24%	22%	30%	29%	26%
Mykolaivska (n=1529)	41%	36%	32%	41%	37%	31%	25%
Khersonska (n=1538)	35%	44%	24%	32%	38%	33%	30%

^{*} Top-7 topics are sorted by Total 8 as displayed in the first row of the chart © GfK April 27, 2017 | Media Poll

TOP-7* information which is lacking









What kinds of information are you lacking?

Total 8 oblast	Fighting corruption at local level 21%	Unbiased news on national level 21%	Unbiased news on local level 20%	Local government activities 13%	Examples of local investigative journalism 13%	The war on the East of Ukraine 12%	Civil society, local volunteer initiatives 8%
Dnipropetrovsk (n=1717)	^{(a} 28 %	18%	17%	19%	21%	16%	14%
Donetska (n=2625)	10%	24%	26%	11%	4%	13%	3%
Zaporizka (n=1511)	27%	26%	24%	18%	19%	13%	15%
Luhanska (n=1823)	15%	24%	25%	13%	10%	14%	6%
Odeska (n=2314)	23%	25%	22%	10%	9%	15%	5%
Kharkivska (n=1620)	20%	15%	11%	8%	12%	7%	6%
Mykolaivska (n=1529)	24%	29%	27%	14%	12%	15%	6%
Khersonska (n=1538)	9%	14%	17%	10%	6%	7%	2%

^{*} Top-7 topics of lacking information are sorted by Total 8 as displayed in the first row of the chart © GfK April 27, 2017 | Media Poll

Segments** using particular primary media source of news, by oblast





What source do you use, to get news and





What is your primary media source for receiving news?

information about events in your settlement, oblast or in the country in general? All-Ukrainian Internet** Social Media** television** Russian sources*** Total 8 oblast* 7% 55% 13% 12% (n=14677)Dnipropetrovska 58% 9% 13% 13% (n=1717)Donetska 49% 11% 14% 9% (n=2625)Zaporizka 67% 6% 5% (n=1511)Luhanska 63% 10% 5% 11% (n=1823)Odeska 61% 14% 5% (n=2314)Kharkivska 41% 14% 17% 8% (n=1620)Mykolaivska 68% 10% 5% 14% (n=1529)Khersonska 16% 8% 5% (n=1538)

^{*} Total for 8 oblasts covered in 2017

^{**} Segments using particular primary media source of news were identified according to question F5 as those who are using:

National television, but not using Internet or social media

²⁾ Internet, but not using TV or social media

Social media, but not using TV or Internet

^{***} Segment was identified according to question F1 and includes those who use any of the Russian media sources (even if not the primary one)

Segments** using particular primary media source of news, by age group

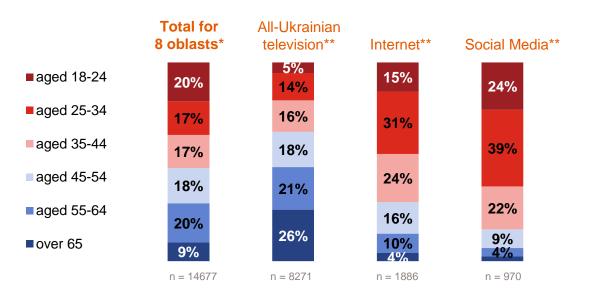




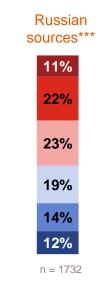


What is your primary media source for receiving news?

Age distribution



What source do you use, to get news and information about events in your settlement, oblast or in the country in general?



^{*} Total for 8 oblasts covered in 2017

^{**} Segments using particular primary media source of news were identified according to question F5 as those who are using:

National television, but not using Internet or social media

²⁾ Internet, but not using TV or social media

Social media, but not using TV or Internet

^{***} Segment was identified according to question F1 and includes those who use any of the Russian media sources (even if not the primary one)

Segments** using particular primary media source of news, by foreign policy





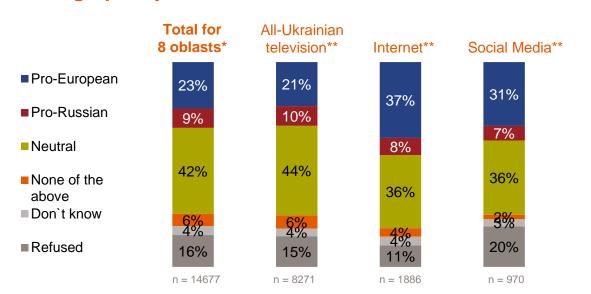




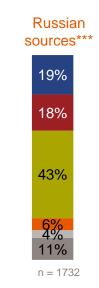
views

What is your primary media source for receiving news?

Foreign policy views



What source do you use, to get news and information about events in your settlement, oblast or in the country in general?



^{*} Total for 8 oblasts covered in 2017

^{**} Segments using particular primary media source of news were identified according to question F5 as those who are using:

National television, but not using Internet or social media

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Social media, but not using TV or Internet

^{***} Segment was identified according to question F1 and includes those who use any of the Russian media sources (even if not the primary one)

Political views, national and language identities

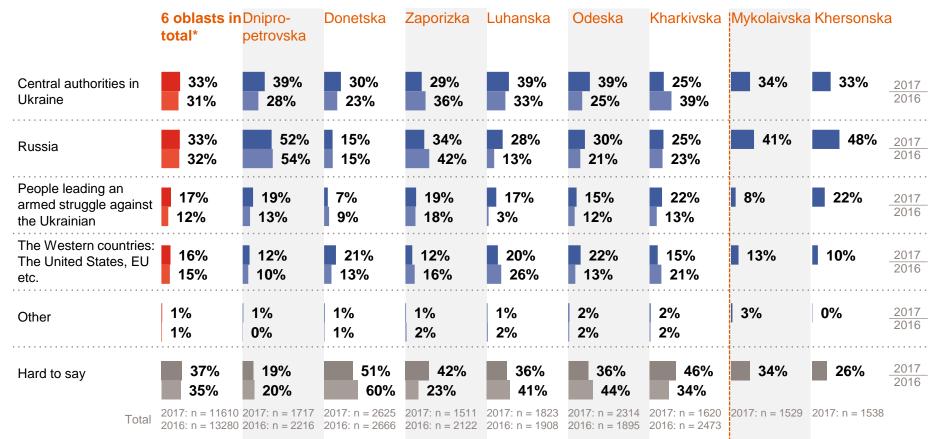
Blame for the military conflict in Donetsk and Luhansk oblasts...





Інститут масової інформації





Attitude towards the return of **Donbass and Crimea**

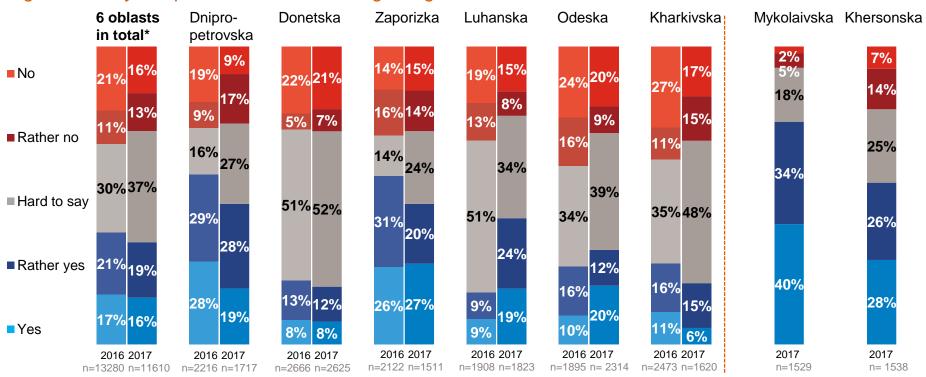








The extent of agreement with the statement «Donbas and Crimea must be returned to Ukraine - we shouldn't agree with any compromises with Russia regarding these issues»



Most preferable scenario for Donbas: the occupied regions...







	6 oblasts in total*	nDnipro- petrovska	Donetska	Zaporizka	Luhanska	Odeska	Kharkivska	Mykolaivska	Khersonska	а
Return to their political arrangement with Kyiv from before	34% 30%	32% 33%	30% 21%	43% 40%	41% 18%	38% 33%	27% 28%	59%	53%	2017 2016
Part of Ukraine but have some autonomy from Kyiv	^e 12% 13%	13% 18%	10% 10%	7% 11%	11% 6%	8% 10%	17% 16%	9%	7%	<u>2017</u> 2016
Part of Ukraine but have a great deal more autonomy from Kyiv	⁶ 7% 9%	6% 7%	13% 9%	7% 5%	11% 18%	6% 7%	6% 14%	4%	5%	<u>2017</u> 2016
Partitioned, with areas under Kyiv's control remaining part of Ukraine	8% 8%	19% 15%	1% 1%	6% 13%	1% 3%	7% 9%	3% 3%	1%	3%	2017 2016
Independent countries	7% 8%	12% 8%	5% 9%	9% 9%	3% 6%	5% 7%	3% 7%	6%	8%	<u>2017</u> 2016
Part of the Russian Federation	2% 3%	1% 1%	2% 2%	2% 4%	4% 9%	2% 3%	1% 3%	1%	1%	2017 2016
Refused / Hard to say	31% 29%	17% 19%	39% 48%	26% 18%	30% 40%	34% 32%	43% 29%	21%	23%	2017
		0 2017: n = 1717 0 2016: n = 2216	2017: n = 2625 2016: n = 2666	2017: n = 1511 2016: n = 2122	2017: n = 1823 2016: n = 1908	2017: n = 2314 2016: n = 1895	2017: n = 1620 2016: n = 2473	2017: n = 1529	2017: n = 1538	

The foreign policy views

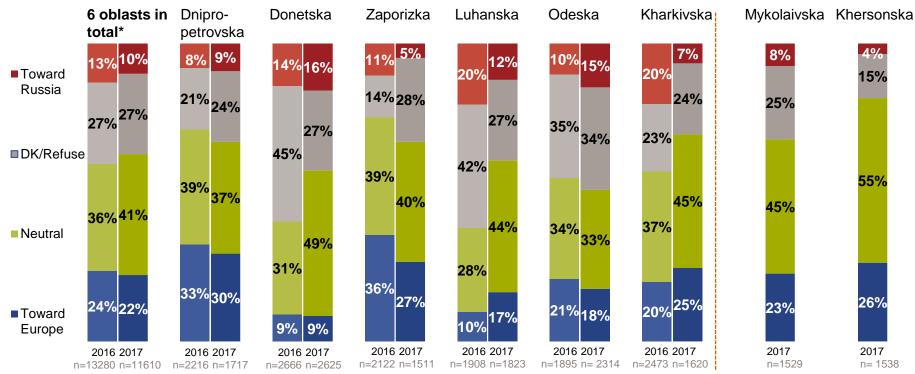








What should be the primary direction that Ukraine takes in its foreign policy?



National identity and language

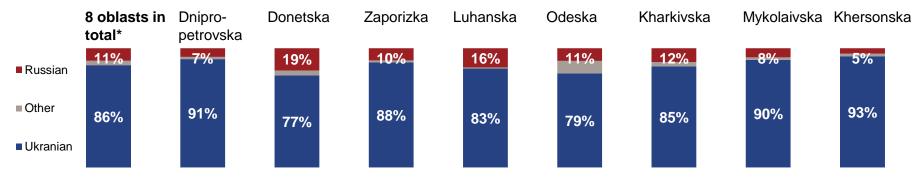




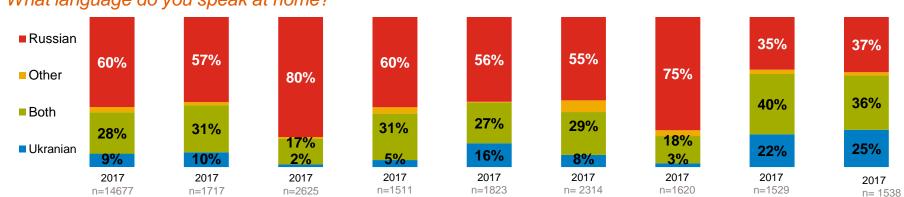




What nationality do you consider yourself?



What language do you speak at home?



Problems and values

TOP-7 the most pressing problems









	8 oblasts in total*	Dnipro- petrovska	Donetska	Zaporizka	Luhanska	Odeska	Kharkivska	Mykolaivska	Khersonska
Shortage of money on food, utilities or other basic needs	55%	55%	66%	50%	41%	48%	56%	55%	66%
The war	32%	31%	57%	23%	42%	27%	19%	39%	36%
Searching the job whic will provide enough income	26%	19%	22%	35%	20%	25%	29%	25%	33%
Healthcare	23%	23%	22%	22%	30%	29%	19%	23%	19%
Shortage of money on expensive goods (like domestic appliances, car)	20%	28%	10%	34%	10%	12%	26%	10%	11%
Family problems	14%	22%	6%	18%	16%	21%	8%	8%	6%
Problems with current job	8% l 2017: n = 14677	8% 2017: n = 1717	6% 2017: n = 2625	11% 2017: n = 1511	7% 2017: n = 1823	7% 2017: n = 2314	9% 2017: n = 1620	8% 2017: n = 1529	9% 2017: n = 1538

Willingness to sacrifice freedom for better security and well-being







Как бы вы расположили свои убеждения на этой шкале, where 1 means you strongly agree with the statement on the left, and 10 is strongly agree with the statement on the right:

1 – For better security and well-being it is ok to sacrifice some freedom

10 – You can't sacrifice your freedom for better security and well-being



- the mean is higher/lower statistically significantly with a probability of 0.95 in 2017 than the mean in 2016 (t-test).

^{*}In 2016 the survey wasn`t conducted in Mykolaivska and Khersonska oblasts