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MIGRATION AND SOCIO-POLITICAL CLIMATE DURING THE FULL-SCALE WAR OF RUSSIA AGAINST UKRAINE – the fifth wave of the study*

Analytical report

July 2022

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Data collection method: a survey self-administered via the mobile application.

Target audience of the study: men and women, aged 18 to 60, who lived in Ukrainian cities with a population of 50 thousand and more at the moment when the war began.

Number of successful interviews :
I wave – 2083,
II wave – 2045,
III wave – 2008,
IV wave – 2012,
V wave – 2007.

Field period of the survey (2022 year):
I wave – May 20 – May22,
II wave – June 3 – June 6,
III wave – June 17 – June 20.
IV wave – July 1 – July 4,
V wave – July 15 – July 18.

CONCLUSIONS (1/4)

Ukrainians'* actions during the war

- **The migration status of Ukrainians* in the fifth wave remains unchanged compared to the previous wave:** 61% of respondents **remain at their permanent place** of residence (more often these are residents of the Western and the Central regions – 76% and 79%, respectively); the rest (39%) of the audience **changed their place of residence**. Among **migrants**, 16% have already **returned home** (more often these are Kyiv residents and residents of the Northern region – 29% for both), and 23% **continue to be far from home** (mostly these are residents of the East – 58%).
- The directions of migration have not changed compared to the fourth wave. More than half (59%) of migrants **migrated to another oblast of Ukraine** (mainly to Lviv), 23% – **abroad** (mainly to Poland and Germany), and 18% – **migrated within their own oblast**.
- There is no change in **the desire to relocate in the event of an aggravation of the situation** in the fifth wave, compared to the previous one; at the same time, there was a decrease in the share of those who deny the presence of such a possibility (from 45% to 40%), – **more Ukrainians* began to claim that they have an opportunity to go abroad** (there is a relatively smaller percentage of them among internally displaced persons, and a relatively bigger one among those who stayed at home). At the same time, those who have the opportunity to go abroad still significantly more often declare their desire to stay in place than those who can move within Ukraine.
- 66% of external migrants who have not yet returned declare their desire to **return home at the first opportunity**, while 21% **want to stay and live in another country**. At the same time, despite the lack of significant changes between the waves, there is a tendency for a gradual increase in the share of those who want to stay abroad and those who have such an opportunity; it can be assumed that the share of those who do not want / cannot stay abroad among those who are still there becomes smaller with each wave.
- **Safety** in the settlement and, conversely, its absence remain the main **driver** (44%) and **barrier** (65%) **to the return to Ukraine for those who went abroad;** at the same time, the share of those who would be encouraged to return home by the existence of prospects for development in Ukraine became relatively smaller, while the share of those who indicated the presence of better living conditions among the reasons for staying abroad became bigger.
- The distribution of responses of **internal migrants** regarding the desire **to stay in the new place** in the fifth wave remained without significant changes – the share of those who **want to return home** is 77%, and the share of those who want to stay is 12%. At the same time, the share of those who claim that they do not have an opportunity to stay in their new place has significantly decreased (from 50% to 43%).
- The level of involvement of family members of the respondents in **the Armed Forces of Ukraine** and **the Territorial Defense Forces** remained at the level of the fourth wave – 24% and 16%, respectively. The level of respondents' own involvement in **volunteering** also did not change and is at 22%.

* Ukrainians - residents of cities with population of 50 thousand and more, aged 18-60 years, who use smartphones

CONCLUSIONS (2/4)

Effect of the full-scale war on Ukrainians'* lives

- **Money** and **access to work** remain the most important things that Ukrainians* need – 65% and 34% of respondents note this, respectively. Persons who stayed at home began to declare their need for housing more often (from 4% to 7%).
- The level of **physical health** of Ukrainians* in the fourth wave **remains mostly at a low level**: 42% of the audience declare the absence of physical health problems, 38% – of mental health problems; more than half of the audience reported having some or many health issues: 58% state having physical health issues, while 61% state having mental health ones.
- **The attitude of the population of the area where internal and external migrants relocated due to the war** remained unchanged in the fourth wave: the vast majority (86%) assess it as **friendly**.
- **Indicators of subjective perception** of Ukrainians* of their own **safety continue to change in a negative direction**: the share of those who feel safe decreased from 27% to 23% (and compared to the third wave, it decreased by 8 percentage points); moreover, this applies both to those who stayed at home and to those who relocated abroad. From a regional perspective, residents of the Northern and the Central regions experienced the greatest decline in perceived safety levels.
- Compared to the fourth wave, the share of Ukrainians* **living with strangers** has increased significantly, mainly due to the increase in the corresponding share of internally displaced persons and people from the East of the country.
- The share of Ukrainians* who received **humanitarian aid from the Ukrainian state** did not change significantly and is at 33%. The most common forms of aid which people received remain food (72%) and money (46%). The assessment of sufficiency of the aid remains without significant changes: 46% consider it sufficient and 48% – insufficient.
- The share of external migrants who received **humanitarian aid from the state where they relocated due to the war** also did not change and is at 71%. The form of the received aid also remained unchanged: more than half received money, food, hygiene products, temporary housing and clothes. The assessment of received assistance as sufficient remains at the level of the fourth wave and is at 79%; at the same time, it was slightly more difficult for respondents to answer this question than in the previous wave.

* Ukrainians - residents of cities with population of 50 thousand and more, aged 18-60 years, who use smartphones

CONCLUSIONS (3/4)

Perception of the full-scale war with Russia

- **The assessment of the effectiveness of the Ukrainian government during the full-scale war remains high**: 65% of respondents highly evaluated the actions of the authorities with regard to military defense of the country against the aggressor, and 62% did so with actions of the authorities since the beginning of the war in general. When it comes to evaluation of ensuring the efficient functioning of the economy, 45% of Ukrainians* assess the actions of the authorities highly (higher evaluations are typical of those aged 18 to 34). At the same time, the evaluation of the government's actions in the context of assistance to the population that lost property and job during the war continues to remain at a low level – 36% evaluated the government's actions to help those who lost property highly, and 30% assessed the actions to help those who lost income and jobs highly.
- **Most of all, the respondents trust the Armed Forces of Ukraine (57%), the President of Ukraine (41%) and volunteer organizations (32%).** The largest share of those who trust the Armed Forces of Ukraine is recorded among residents of the Western (66%) and Central (63%) regions, as well as among the older age group (74%).
- **Ukrainians'* perception of the future remains optimistic** – more than half of the respondents are confident that Ukraine will be able to build a strong economy (58% believe this) and become a member of the European Union before 2030 (58%). Also, 55% believe that the state will rebuild everything that is destroyed during the war. The biggest optimists are respondents from the younger age group (18 to 24), and there are slightly fewer of them among the 55 to 60 age group.
- When it comes to timelines of reforms, a third (35%) of respondents believe that reforms should be implemented now, as they are important for victory, and almost an equal share (31%) believe that they should be implemented gradually. Regarding the economic reforms that are currently more relevant for business, 41% of respondents indicated that the state should give freedom to entrepreneurs, protect their rights, and reduce taxes. Only 10% of Ukrainians* supported nationalization of business and intensifying its checks.
- According to Ukrainians, the top 3 signs of a strong economy are growth of GDP (43% indicated this), interest of foreign investors in the country (42%) and an increase in wages (41%).

* Ukrainians - residents of cities with population of 50 thousand and more, aged 18-60 years, who use smartphones

CONCLUSIONS (4/4)

Latest news

- The most important **events** of the past week that were most often **spontaneously mentioned** by the respondents are **missile shelling of Vinnytsia** (28%), **shelling of Ukrainian cities in general** (14%) and **news from the front** (13%).
- **93% of Ukrainians* know** of at least one of the studied **events.** They are most aware of the shelling of Vinnytsia (83%), the destruction of Russian ammunition warehouses (65%), and missile shelling of Kharkiv and Zaporizhzhia (63%).
- **The events** of the week **influenced the migration intentions of 28% of respondents.** 42% of them intend to move within the country, and 25% – abroad (this was most affected by the missile shelling of Vinnytsia, Kharkiv and Zaporizhzhia).

Employment during the war

- **General indicator of employment among Ukrainians* remains stable in the fifth wave of the survey:** 58% of respondents are currently employed. 39% of them work full-time or part-time, and another 19% do not perform work tasks. The largest share of the working population is observed among the residents of the Central and the Western regions, as well as among those who remained at their place of residence.
- The majority of employed Ukrainians* receive a salary (74%). But only a third (28%) are sure that they will continue to receive it, and 46% have no such confidence.
- 35% of Ukrainians* are unemployed (the largest share is recorded among external migrants – 46% of them do not have a job). A third (34%) of the unemployed declare that they lost their job after the full-scale invasion, and 44% were unemployed prior to it.
- When it comes to income, 73% of Ukrainians* declare its decrease since the beginning of the full-scale war. The most vulnerable are the older age groups (45+) and internal migrants, while the least vulnerable are young people aged 18 to 24.

* Ukrainians - residents of cities with population of 50 thousand and more, aged 18-60 years, who use smartphones

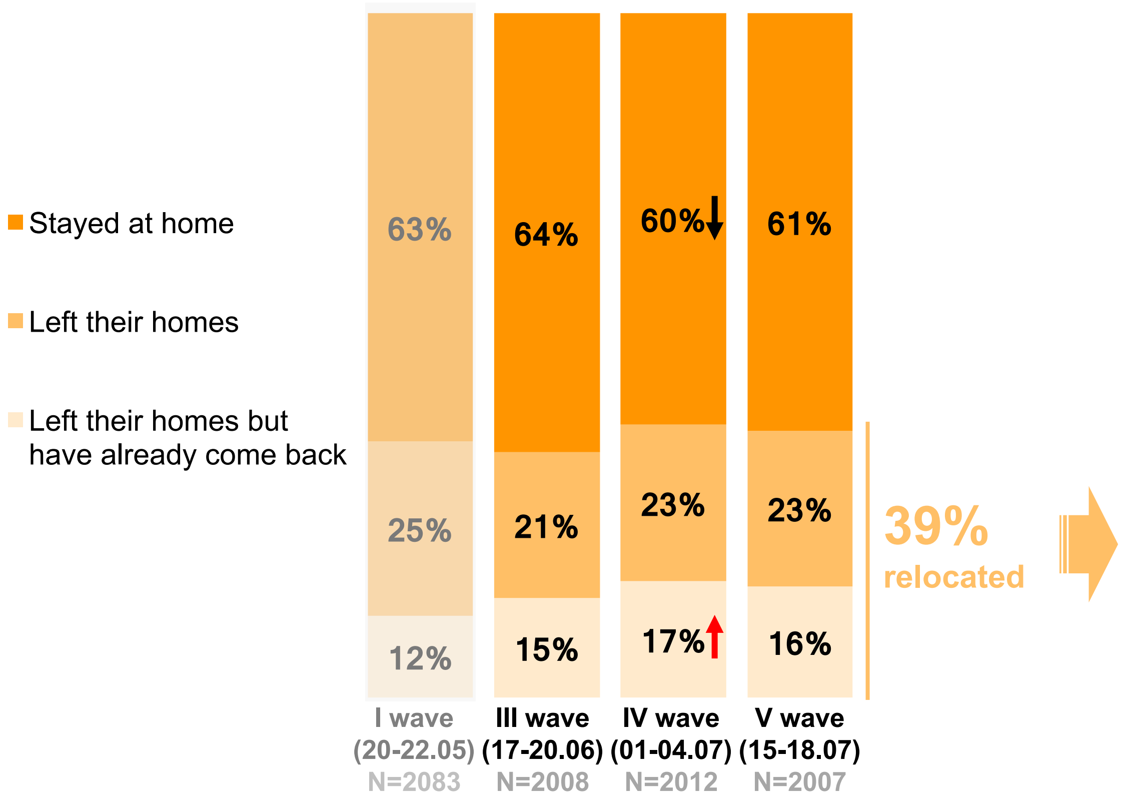
UKRAINIANS'* ACTIONS DURING THE FULL-SCALE WAR

*Ukrainians – residents of cities with population of 50 thousand and more, aged 18-60 years, who use smartphones.

RELOCATION OF UKRAINIANS* DUE TO THE WAR

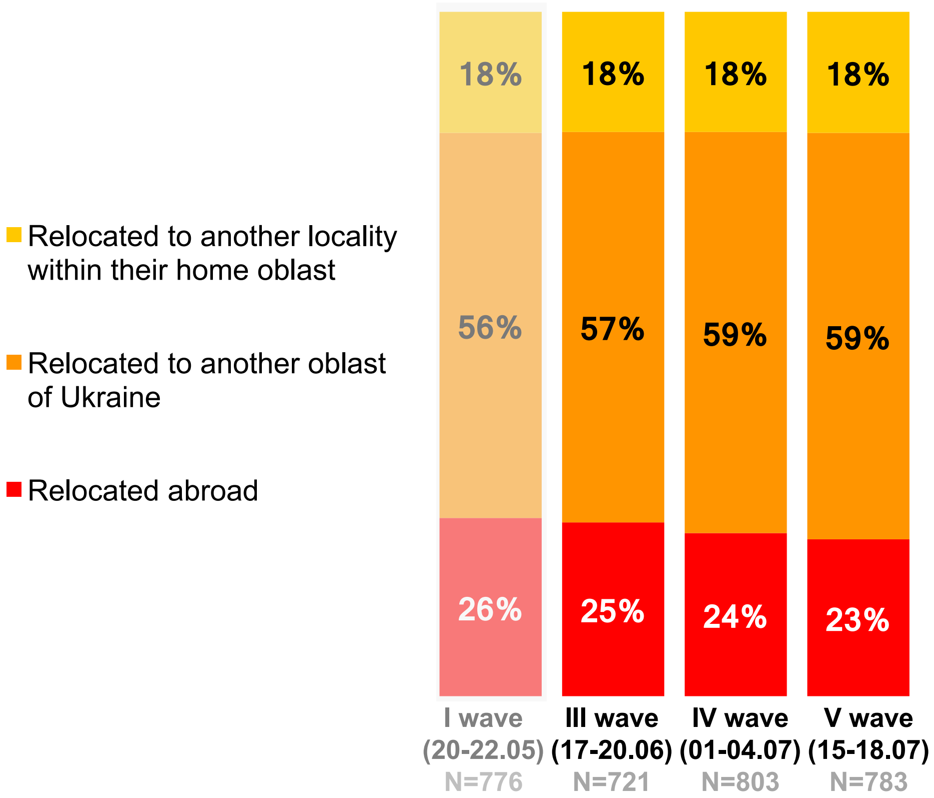
Compared to the previous wave, migration patterns of Ukrainians* in the fifth wave remained unchanged: 61% of respondents stayed at home, and 39% changed their place of residence (23% of them continue to stay at their new place, and 16% have already returned). Migration directions also remain unchanged: respondents most often went to other oblasts of Ukraine (59%) or abroad (23%); less than a quarter (18%) of respondents migrated within their oblast.

Relocation of Ukrainians* due to the war



Base: all respondents

Relocation specifics



Base: respondents who relocated

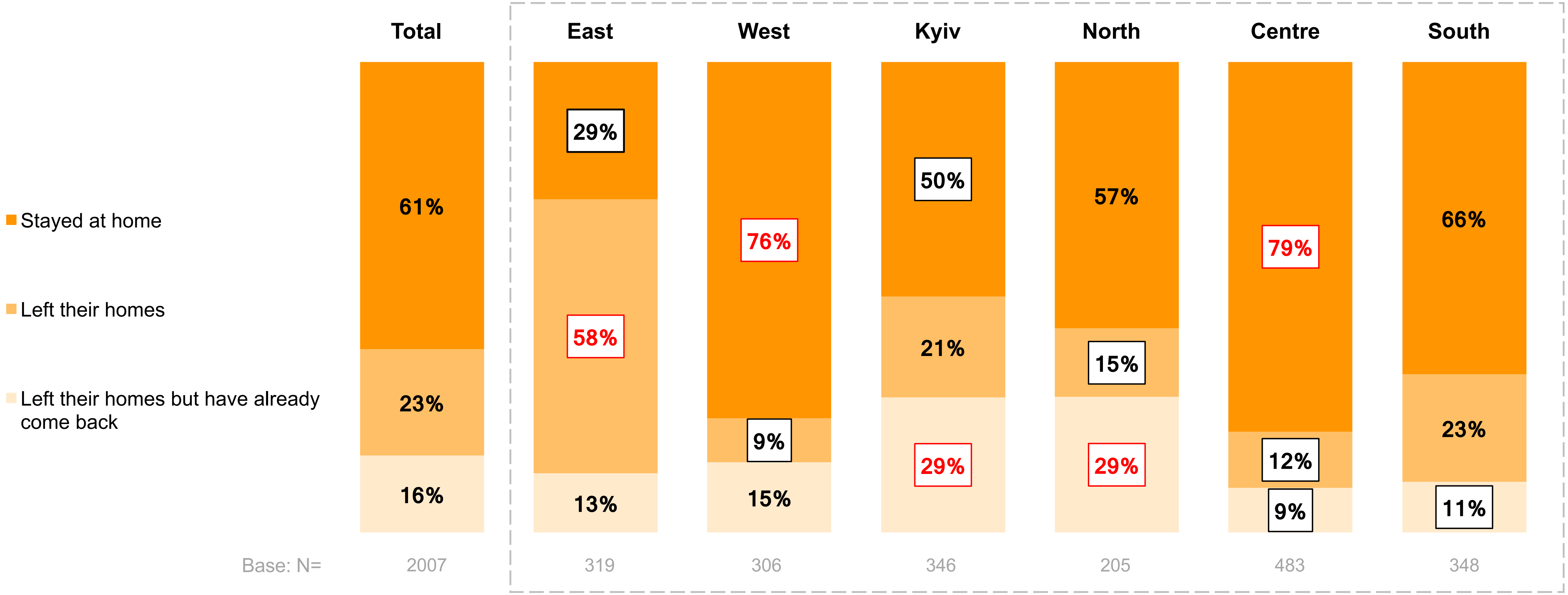
Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

*Ukrainians - residents of cities with population of 50 thousand and more, aged 18-60 years, who use smartphones
Which of the following phrases best reflects your actions in the situation of Russia's war against Ukraine:
In which direction were you forced to move::

RELOCATION DUE TO THE WAR

by regions

There are no significant differences in migration patterns depending on the region of residence compared to the previous wave. Residents of the Western and Central regions stayed at their permanent place of residence more often than residents of other regions, while residents of the Eastern region, on the contrary, more often left their homes; at the same time, residents of Kyiv, as well as residents of the Northern region more often declare returning home after temporary migration.



*Ukrainians - residents of cities with population of 50 thousand and more, aged 18-60 years, who use smartphones
Base: all respondents
Which of the following phrases best reflects your actions in the situation of Russia's war against Ukraine:

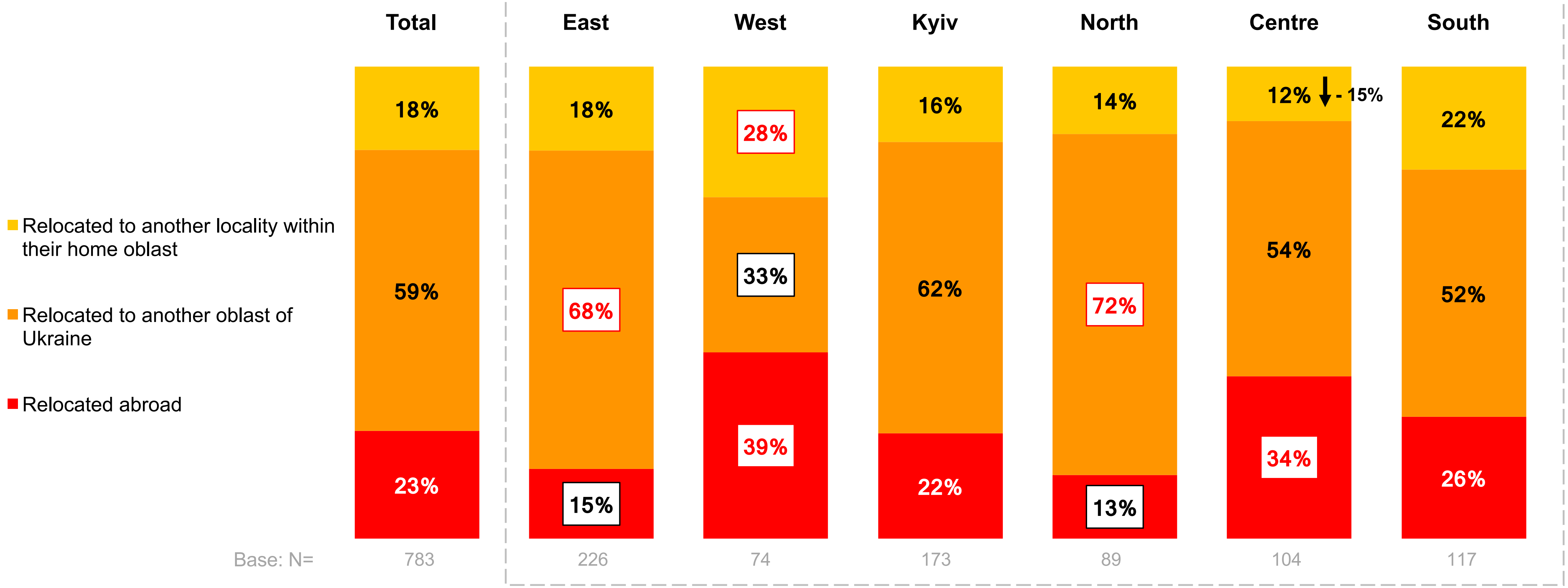
Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

DIRECTION OF RELOCATION

by region

There are no differences between waves in the regional distribution of relocation directions (with the exception of a decrease in the share of residents of the Central region who declare relocation within the oblast – from 27% to 12%). In general, residents of the North and East of the country migrated to other oblasts of Ukraine more often than residents of other regions, while residents of the Central and Western regions more often relocated abroad; the latter group also more often mentioned relocation to another settlement within the oblast.



Base: respondents who relocated.
In which direction were you forced to move:

Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

MIGRATION DESTINATIONS
within Ukraine

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Lviv oblast remains the most common destination for internally displaced people.

Oblasts from which 20 or more respondents have relocated are marked by colour

Oblast to which relocated (TOP-12)	Oblast from which relocated: Total	Kyiv city	Kharkiv oblast	Donetsk oblast	Chernihiv oblast	Dnipropetrovsk oblast	Luhansk oblast	Odesa oblast	Mykolaiv oblast	Kyiv oblast	Kherson oblast	Lviv oblast	Zaporizhzhia oblast	Zhytomyr oblast	Poltava oblast	Sumy oblast	Ivano-Frankivsk oblast
Lviv oblast	**14%**	15%	5%	11%	2%	25%	0%	42%	17%	9%	20%	0%	44%	27%	26%	61%	0%
Ivano-Frankivsk oblast	**8%**	11%	7%	3%	0%	8%	0%	9%	0%	0%	31%	30%	5%	13%	22%	0%	0%
Cherkasy oblast	**8%**	9%	2%	3%	54%	0%	3%	0%	4%	24%	0%	0%	3%	0%	0%	0%	0%
Zakarpattia Oblast	**8%**	10%	0%	3%	0%	7%	16%	6%	14%	10%	0%	18%	16%	40%	13%	7%	0%
Poltava oblast	**7%**	4%	28%	7%	2%	3%	4%	2%	12%	0%	0%	0%	0%	0%	0%	19%	0%
Chernivtsi oblast	**7%**	4%	7%	7%	10%	14%	0%	25%	0%	9%	0%	12%	6%	13%	4%	13%	0%
Vinnytsia oblast	**6%**	10%	7%	8%	0%	0%	10%	10%	0%	3%	6%	0%	3%	0%	0%	0%	0%
Dnipropetrovsk oblast	**5%**	0%	14%	14%	0%	0%	19%	0%	0%	0%	0%	0%	18%	0%	0%	0%	0%
Khmelnytsky oblast	**5%**	9%	1%	0%	2%	22%	5%	0%	0%	20%	0%	0%	0%	0%	7%	0%	14%
Kyiv city	**5%**	0%	5%	13%	4%	7%	17%	3%	0%	0%	16%	0%	5%	0%	0%	0%	0%
Zhytomyr oblast	**5%**	16%	0%	4%	0%	0%	0%	0%	0%	14%	5%	0%	0%	0%	0%	0%	0%
Ternopil oblast	**4%**	5%	4%	6%	4%	0%	0%	0%	6%	6%	0%	20%	0%	0%	0%	0%	31%
Kyiv oblast	**4%**	0%	6%	9%	17%	0%	3%	0%	0%	0%	5%	0%	0%	0%	0%	0%	0%
Base: respondents who relocated to another oblast of Ukraine	*465*	*107*	*68*	*55*	*36*	*34*	*29*	*21*	*17*	*13*	*12*	*12*	*11*	*10*	*8*	*6*	*5*

Only oblasts from which more than 5 respondents have relocated are shown.
Область, в яку були вимушені переїхати в Україні:

** Insufficient base for analysis (observation of trend)*

↓↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

MIGRATION DESTINATIONS

abroad

Poland and Germany remain the most popular destinations for immigration.

Oblasts from which 10 or more respondents have relocated are marked by colour

Country to which relocated (TOP-15)	Oblast from which relocated: Total	Zhytomyr oblast	Donetsk oblast	Chernihiv oblast	Zaporizhzhia oblast	Chernivtsi oblast	Poltava oblast	Sumy oblast	Odesa oblast	Kharkiv oblast	Ivano-Frankivsk oblast	Kyiv oblast
Poland	**26%**	16%	18%	33%	63%	24%	34%	0%	54%	22%	24%	64%
Germany	**17%**	16%	21%	32%	3%	53%	10%	38%	5%	0%	0%	12%
Slovakia	**7%**	4%	28%	0%	0%	4%	0%	0%	0%	0%	0%	0%
Italy	**6%**	3%	9%	0%	13%	0%	0%	0%	10%	0%	5%	0%
Czech Republic	**5%**	3%	2%	3%	15%	0%	9%	8%	5%	0%	0%	15%
Austria	**3%**	8%	0%	4%	0%	0%	0%	0%	0%	19%	0%	0%
Great Britain	**3%**	1%	2%	0%	0%	0%	36%	0%	0%	0%	0%	0%
France	**3%**	4%	0%	6%	0%	12%	0%	0%	0%	0%	7%	0%
USA	**2%**	0%	0%	0%	0%	0%	0%	0%	0%	59%	0%	0%
Lithuania	**2%**	1%	7%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Belgium	**2%**	8%	0%	0%	0%	4%	0%	0%	0%	0%	0%	0%
Estonia	**2%**	0%	2%	0%	2%	0%	0%	0%	0%	0%	45%	0%
Moldova	**2%**	1%	0%	0%	0%	0%	0%	21%	0%	0%	19%	0%
Greece	**2%**	3%	4%	0%	0%	0%	0%	6%	0%	0%	0%	9%
Netherlands	**2%**	1%	0%	10%	0%	0%	0%	0%	0%	0%	0%	0%
Base: respondents who relocated to another country	*179*	*39*	*24*	*17*	*13*	*12*	*11*	*9*	*8*	*7*	*7*	*5*

Only oblasts from which more than 5 respondents have relocated are shown.
Please indicate the country to which you relocated

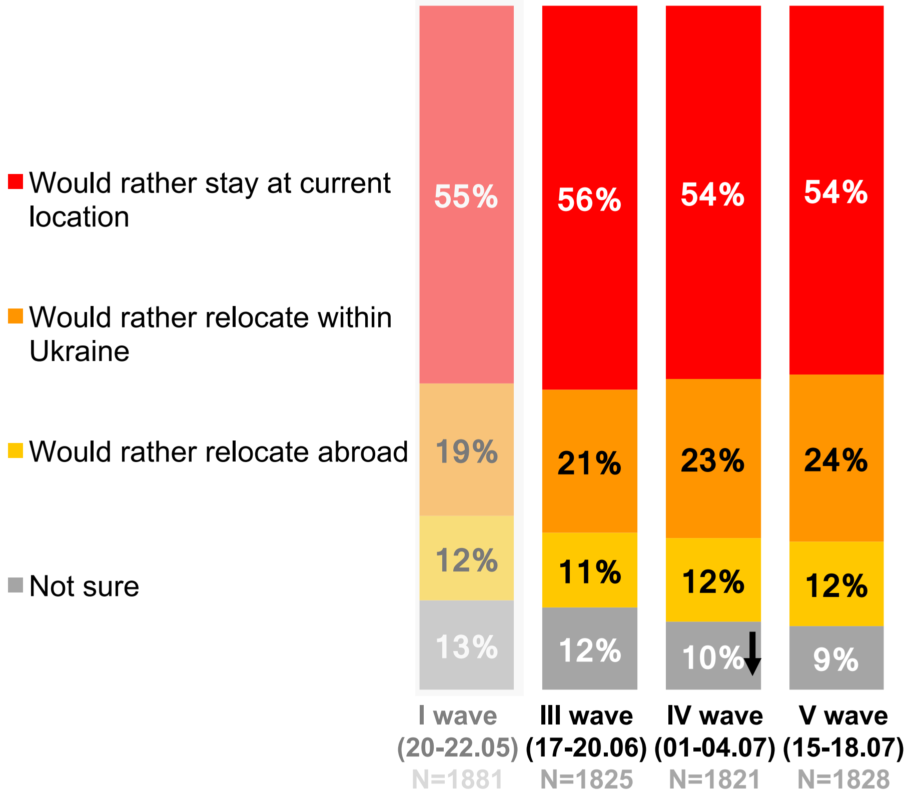
** Insufficient base for analysis (observation of trend)*

↓↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

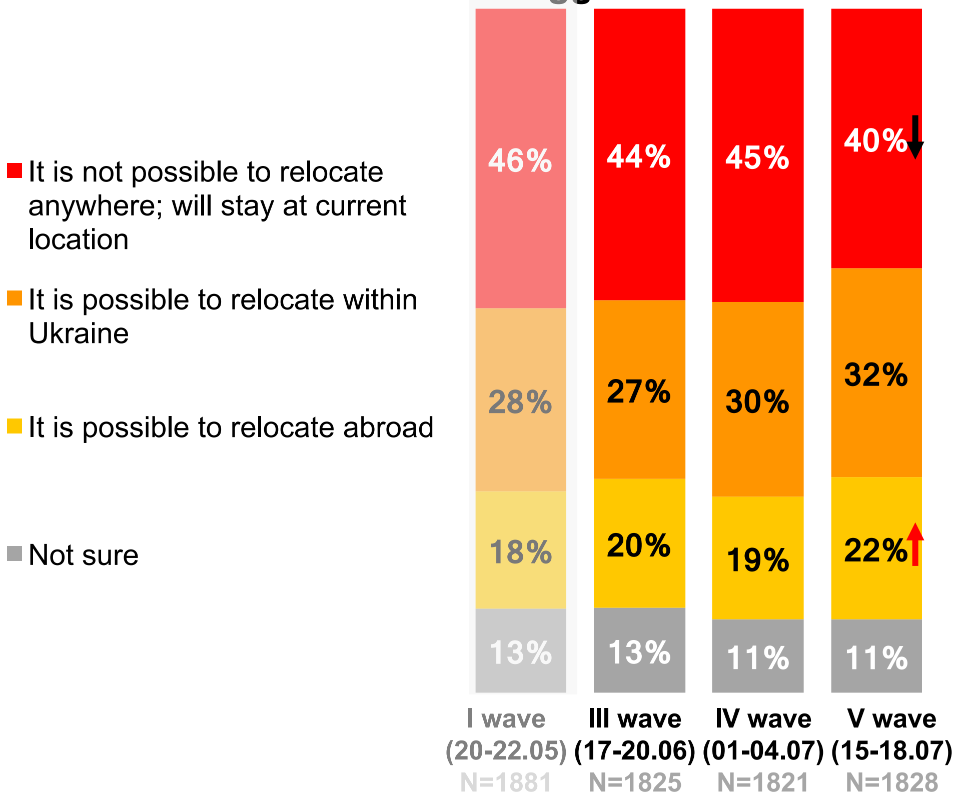
RELOCATION IN CASE OF AGGRAVATION. WISHES & OPPORTUNITIES

There are no changes in the desire to relocate in case of aggravation of the situation in the fifth wave, compared to the previous one. In general, 54% of respondents who remained in Ukraine strive to stay at their current place of residence, 24% want to move within the country, and 12% want to relocate abroad. Also, in the fifth wave, the share of people indicating the possibility of migrating abroad has increased (from 19% to 22%), mainly due to a decrease in the share of those who do not have the opportunity to change their current place of residence (from 45% to 40%). The share of those who declare the possibility of migration within the country remained without significant changes and is at 32%.

In case of aggravation of the situation would rather…



Possibility to relocate further away in case of aggravation of the situation



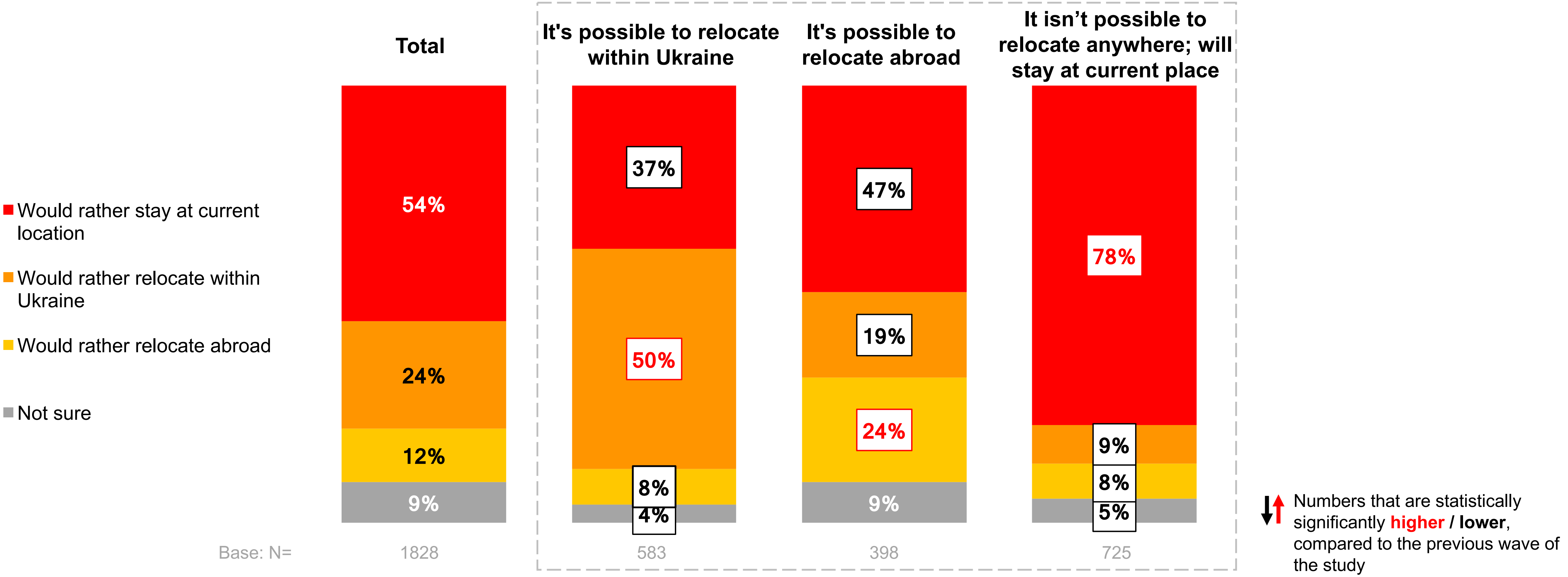
Base: respondents who stayed at home or relocated within Ukraine
In case of further exacerbation, would you rather relocate further away, go abroad or stay where you are now?
In case of further exacerbation, is it possible for you to relocate further away, go abroad or stay where you are now?

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

RELOCATION IN CASE OF AGGRAVATION. WISHES

by opportunity to relocate

In the fifth wave, there were no changes in the distribution of responses regarding the desire to migrate depending on the available opportunity. Respondents who have the opportunity to migrate abroad significantly more often declare their desire to stay at current location than those who can move within Ukraine.



Base: respondents who stayed at home or relocated within Ukraine
In case of further exacerbation, would you rather relocate further away, go abroad or stay where you are now?
In case of further exacerbation, is it possible for you to relocate further away, go abroad or stay where you are now?

Numbers that are statistically significantly **higher** / **lower** for group, compared to the sample as a whole.

RELOCATION IN CASE OF AGGRAVATION. WISHES & OPPORTUNITIES

by migration status

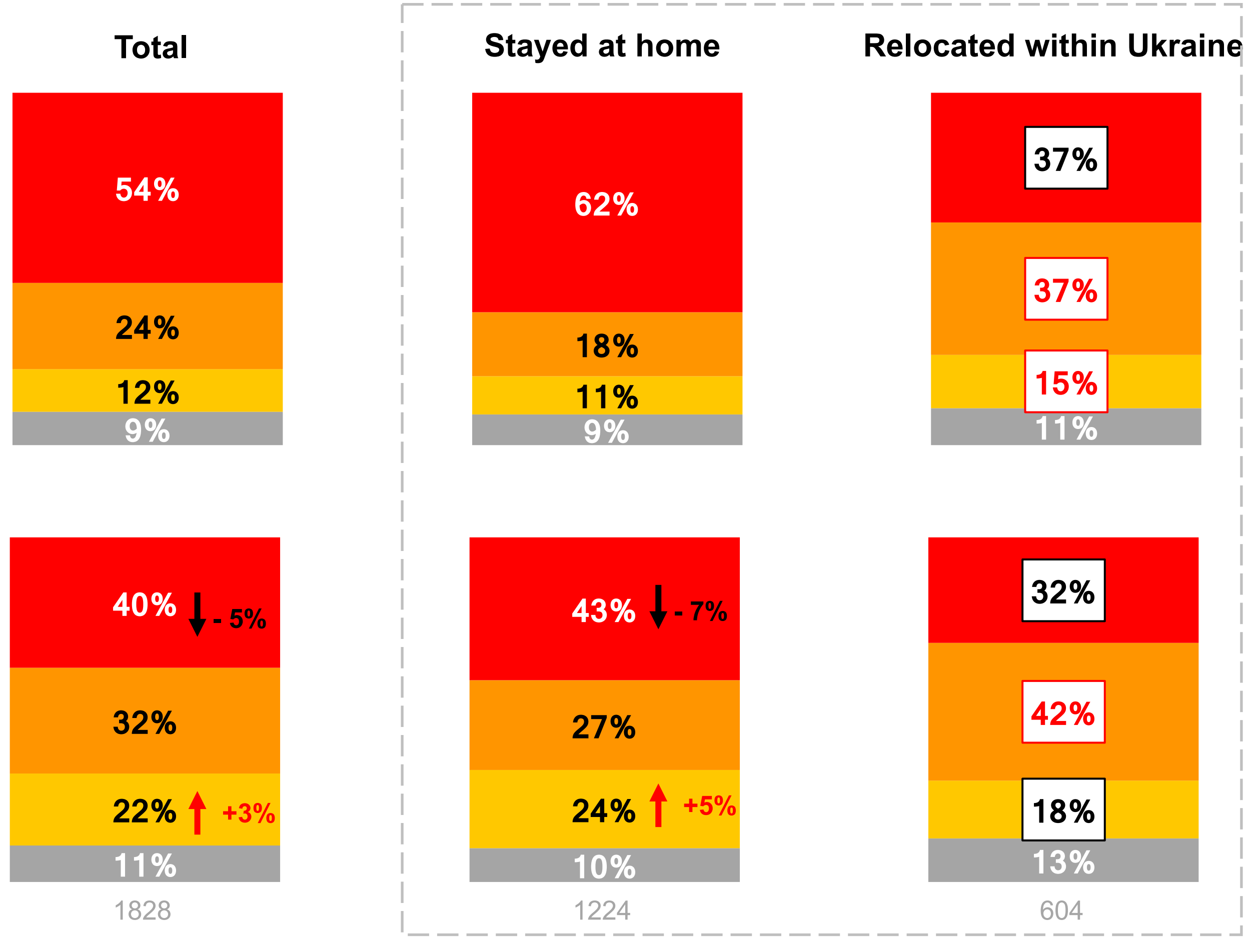
In the fifth wave, the distribution of answers to the question about the desire to relocate in case of an aggravation of the situation depending on the migration status remained unchanged. IDPs* more often intend to change their place of residence in the event of aggravation of the situation, while those who have not left their homes are more likely to continue to stay there. At the same time, respondents who stayed at home began to indicate the possibility of moving abroad more often (from 19% to 24%). In general, internal migrants retain more opportunities for re-migration within Ukraine than those who remain at home.

In case of aggravation of the situation would rather…

- Would rather stay at current location
- Would rather relocate within Ukraine
- Would rather relocate abroad
- Not sure

Possibility to relocate further away in case of aggravation of the situation

- It is not possible to relocate anywhere; will stay at current location
- It is possible to relocate within Ukraine
- It is possible to relocate abroad
- Not sure



*IDPs – Internally Displaced Persons

Base: respondents who stayed at home or relocated within Ukraine

In case of further exacerbation, would you rather / is it possible for you to relocate further away, go abroad or stay where you are now?

Numbers that are statistically significantly **higher** / **lower** for those who relocated within Ukraine, compared to those who stayed at home

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

RELOCATION IN CASE OF AGGRAVATION. WISHES & OPPORTUNITIES

by region

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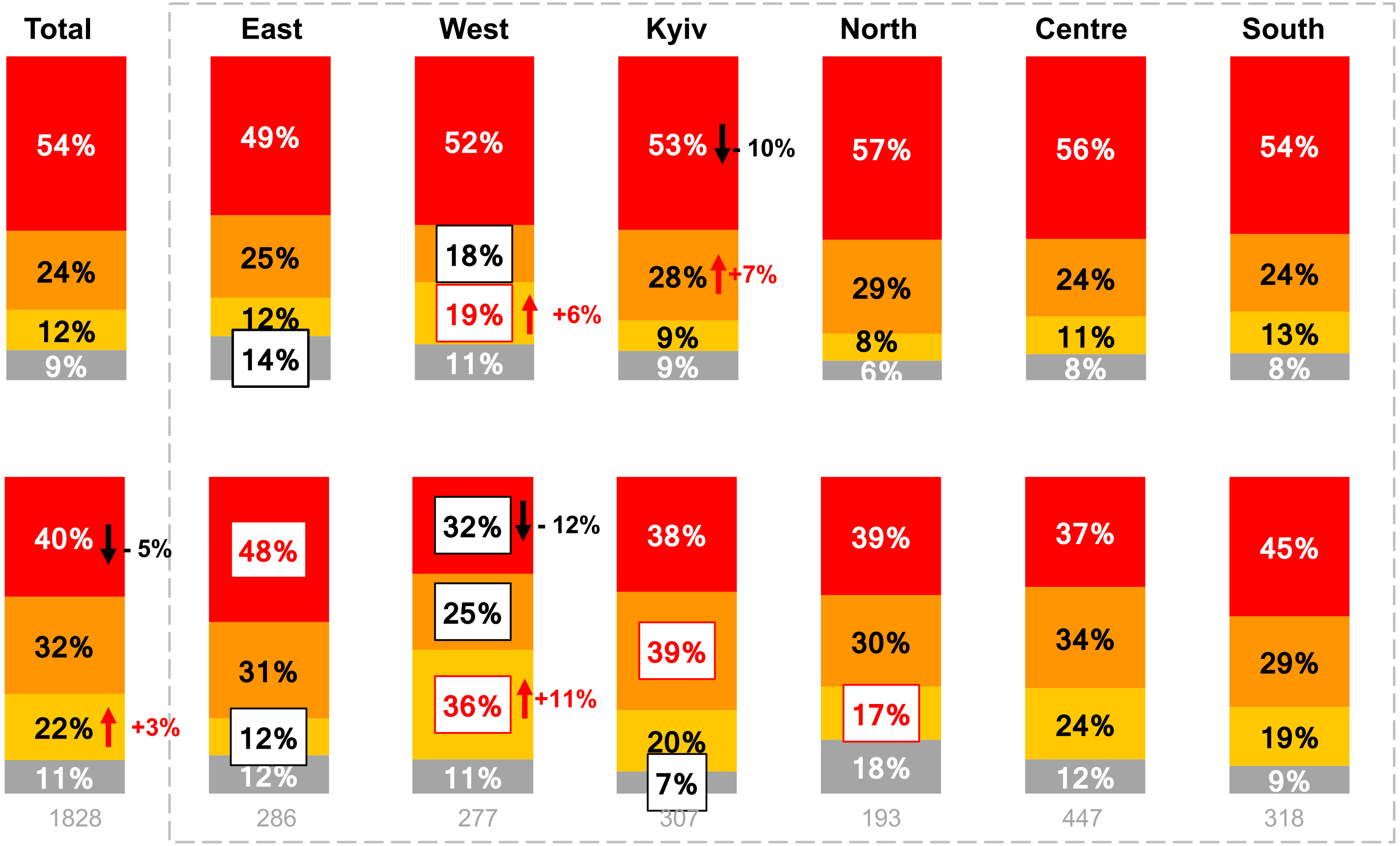
Compared to the fourth wave, the share of residents of the Western region who want to move abroad in case of aggravation of the situation has increased significantly (from 13% to 19%), while residents of Kyiv more often want to move within the country (from 21% to 28%) and less often – stay at the current place of residence (from 63% to 53%). The share of those who state it is possible to relocate abroad among the residents of the Western region has also increased (from 25% to 36%).

In case of aggravation of the situation would rather…

- Would rather stay at current location
- Would rather relocate within Ukraine
- Would rather relocate abroad
- Not sure

Possibility to relocate further away in case of aggravation of the situation

- It is not possible to relocate anywhere; will stay at current location
- It is possible to relocate within Ukraine
- It is possible to relocate abroad
- Not sure



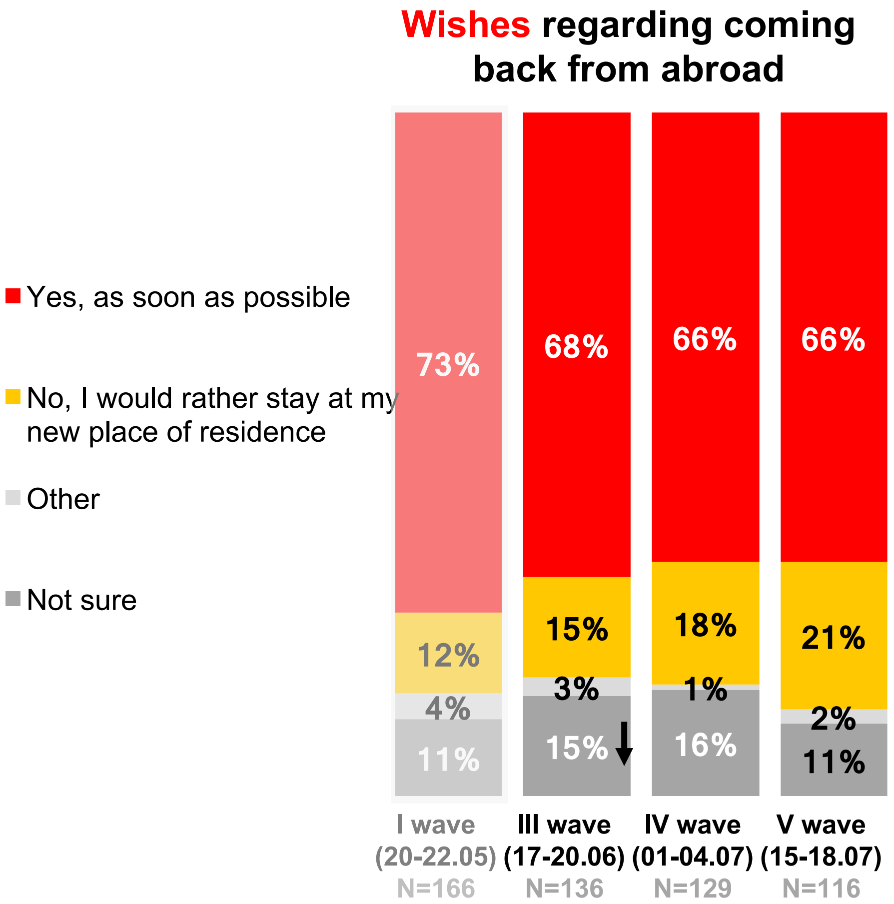
Base: respondents who stayed at home or relocated within Ukraine
In case of further exacerbation, would you rather / is it possible for you to relocate further away, go abroad or stay where you are now?

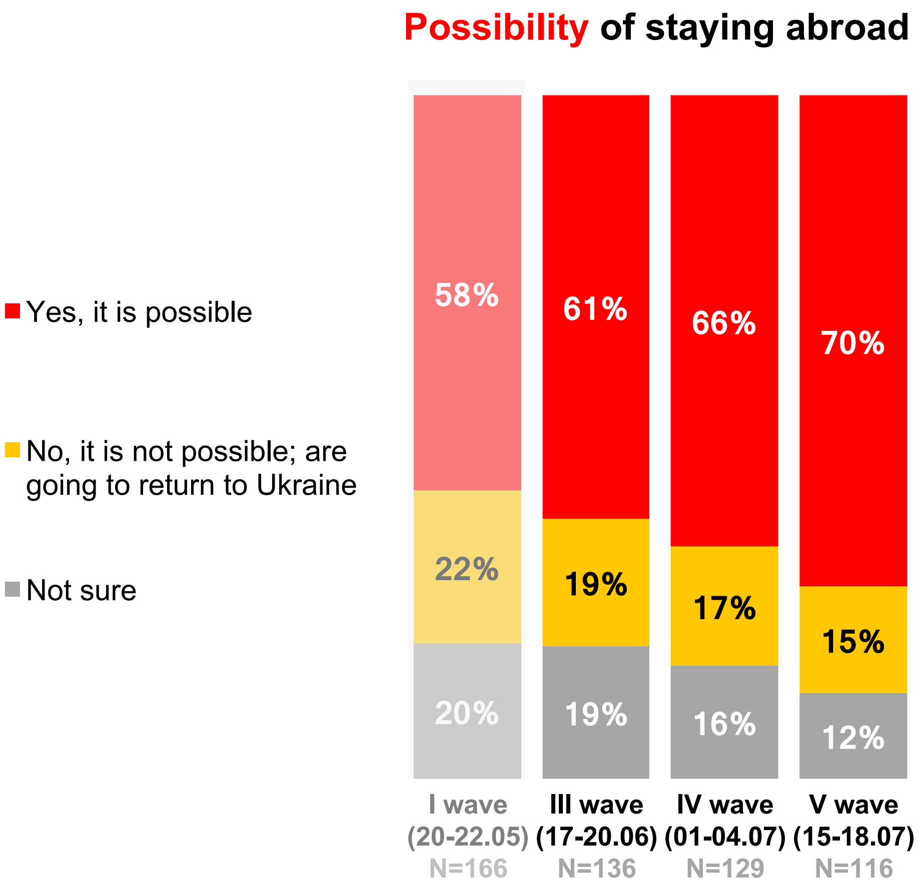
Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

WISHES REGARDING COMING BACK FROM ABROAD. POSSIBILITY OF STAYING THERE

In the fifth wave, there were no significant changes in the distribution of answers to the question about the desire to return from abroad. The vast majority (66%) of emigrants want to return at the first opportunity, while 21% want to stay in their new place. The distribution of answers to the question about the possibility of staying abroad also remained unchanged: more than two thirds (70%) of the respondents have such an opportunity, while 15% indicate its absence.





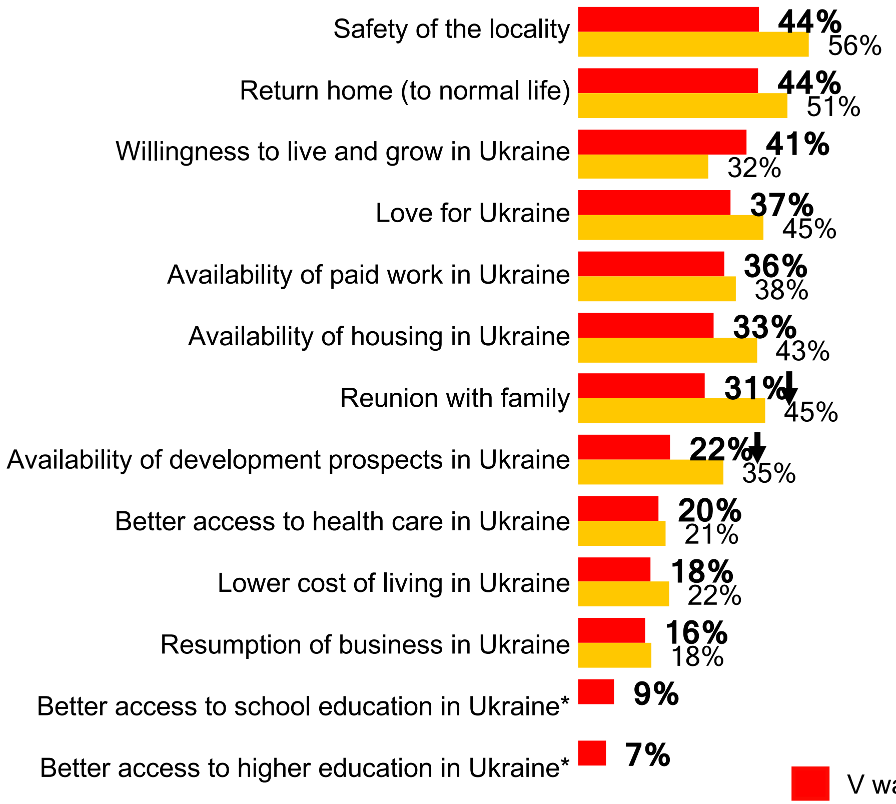
Base: respondents who relocated abroad and have not come back yet
Do you want to return to Ukraine?
Is it possible for you to stay abroad?

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

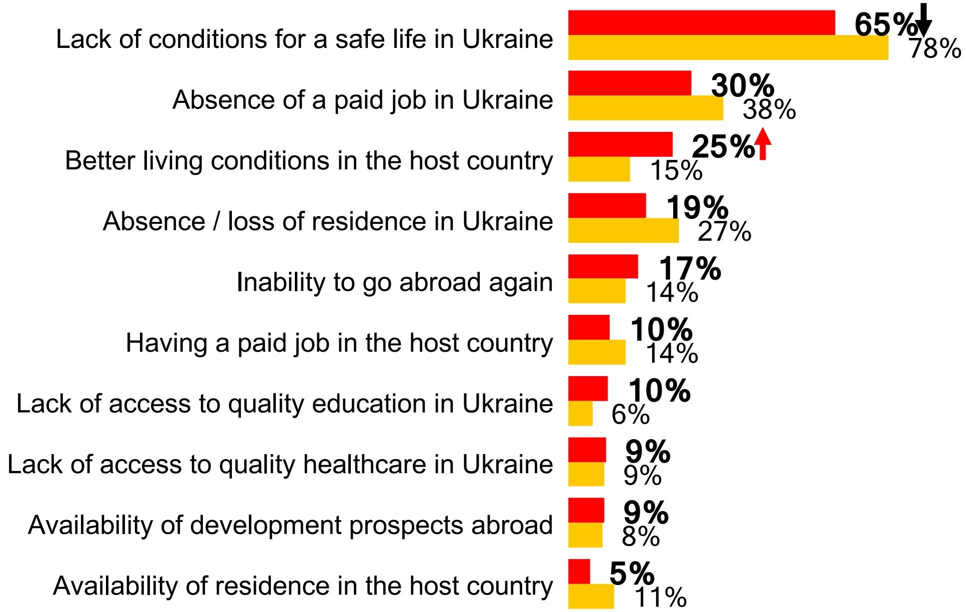
RETURNING TO UKRAINE. DRIVERS AND BARRIERS

The main drivers of returning for persons who have relocated abroad and who have not yet returned home remain the safety factor in the locality (44%) and the desire to come back to their usual life at permanent place of residence (44%). In addition, compared to the previous wave, there is a decrease in the share of those for whom the drivers of returning to Ukraine are reunion with the family (from 45% to 31%) and the belief that there are prospects for development in Ukraine (from 35% to 22%). The lack of safe conditions remains the main barrier to returning from abroad for 65% of respondents, but the share of respondents who chose this option has significantly decreased compared to the fourth wave (from 78% to 65%); at the same time, there was an increase in the percentage of those mentioning the availability of better living conditions in the host country (from 15% to 25%).

Drivers to return from abroad



Barriers to returning from abroad



V wave(14-18.07), N=116 IV wave(01-04.07), N=129

*Alternatives were added in the V wave, instead of "Better access to education in Ukraine"

Base: respondents who relocated abroad and have not come back yet

What circumstances would encourage you to return to Ukraine? | What circumstances are holding you back from returning home?

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

INTERNALLY DISPLACED PERSONS' WISHES REGARDING COMING BACK. POSSIBILITY OF STAYING WHERE THEY ARE

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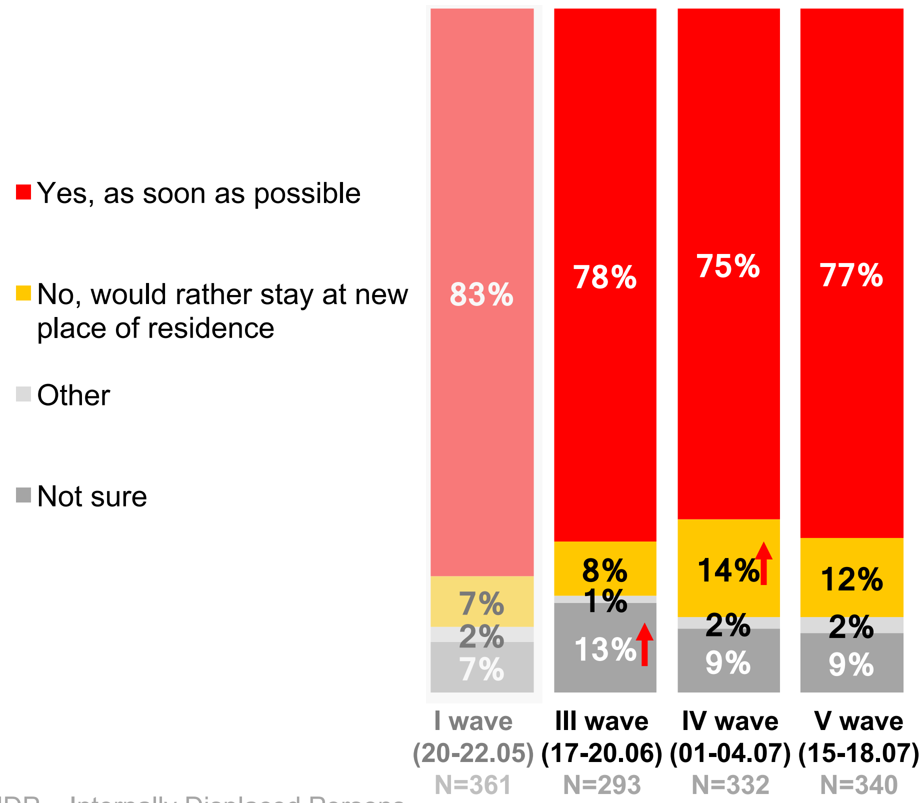
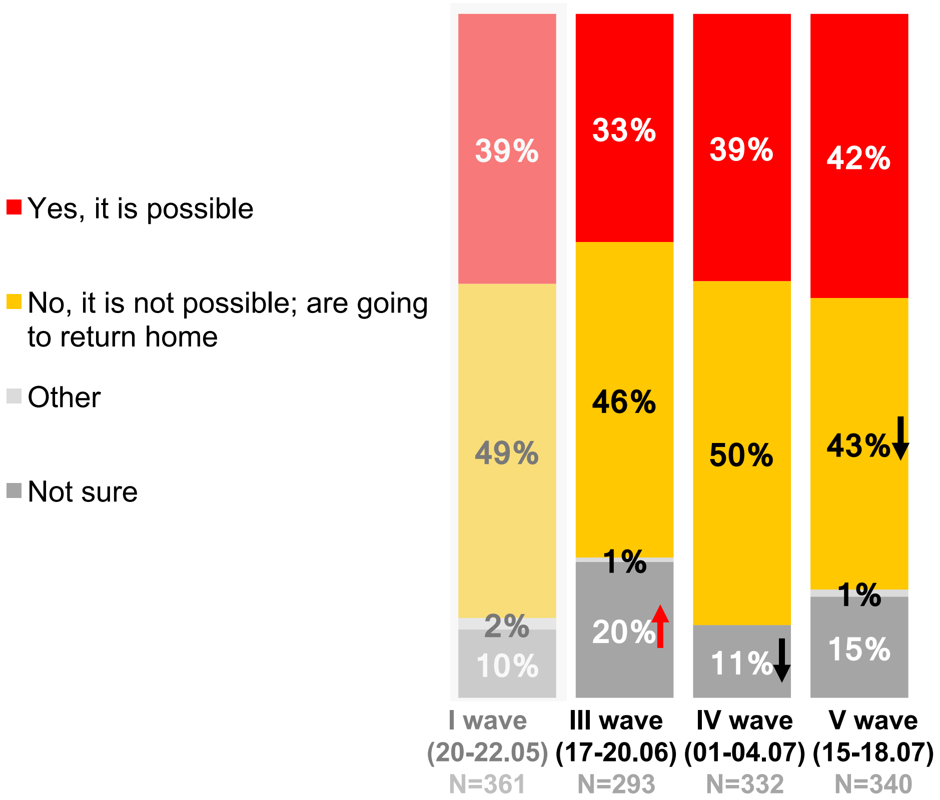
In the fifth wave, the distribution of responses regarding the desire to change the current place of residence remained unchanged. 77% of respondents want to return home at the first opportunity, and 12% want to stay and live in the new place. At the same time, the share of those who do not have the opportunity to stay in their new place decreased (from 50% to 43%), mainly due to an insignificant increase in the share of those who do have such an opportunity (from 39% to 42%) and those who hesitate to answer (from 11% to 15%).

Wishes regarding coming back home



Possibility of staying at the new place

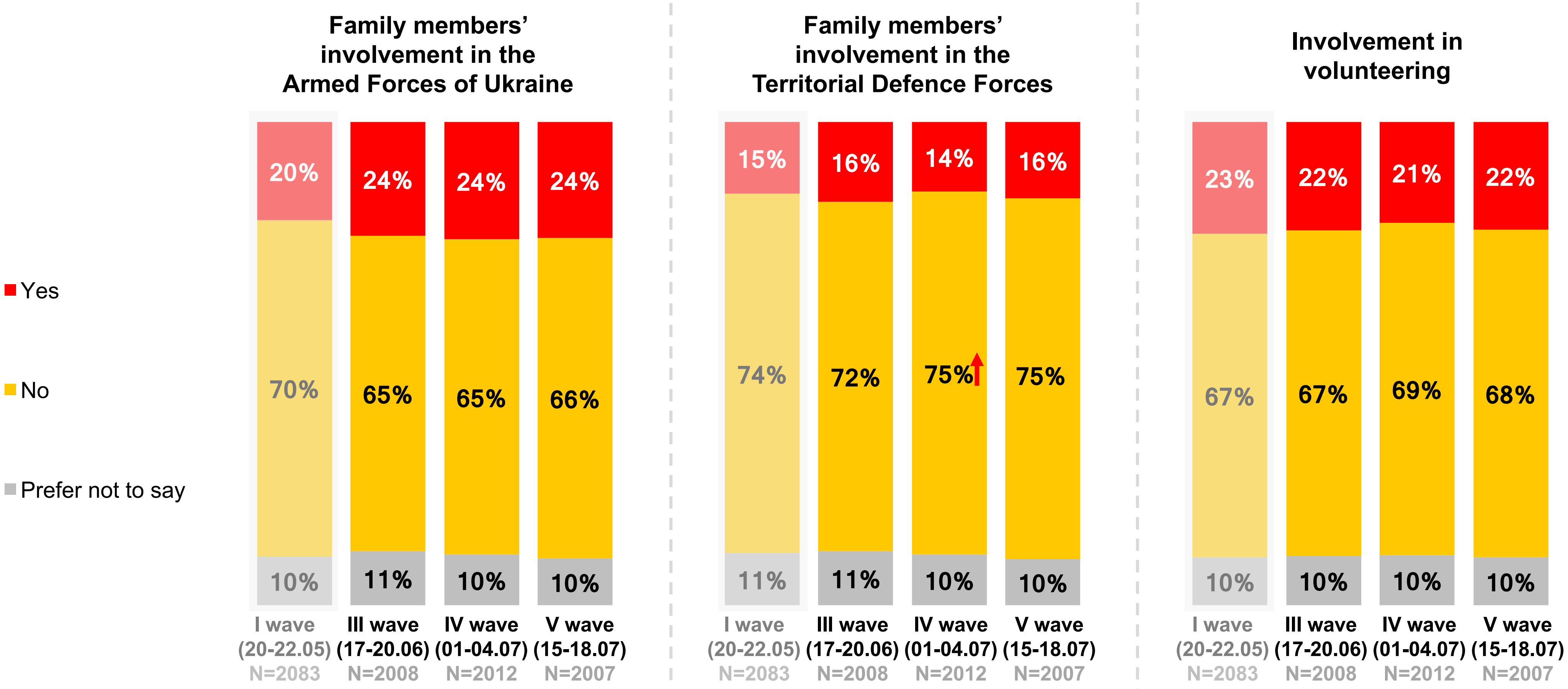


*IDP – Internally Displaced Persons
Base: respondents who relocated within Ukraine and have not come back yet
Do you want to return to your permanent place of residence when/if the hostilities there are over?
Is it possible for you to stay at your new place of residence if / when the hostilities at your permanent place of residence are over?

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

INVOLVEMENT IN MILITARY AND VOLUNTEERING ACTIVITIES

The level of involvement of family members in the Armed Forces of Ukraine and Territorial Defense Forces in the fifth wave of the study remained unchanged at 24% and 16%, respectively. The level of respondents' own participation in volunteer activities also remained unchanged – 22%.



Base: all respondents
Does anyone from your family currently serve in the Armed Forces of Ukraine? | Does anyone from your family currently serve in the Territorial Defence Forces? | Are you currently involved in volunteering?

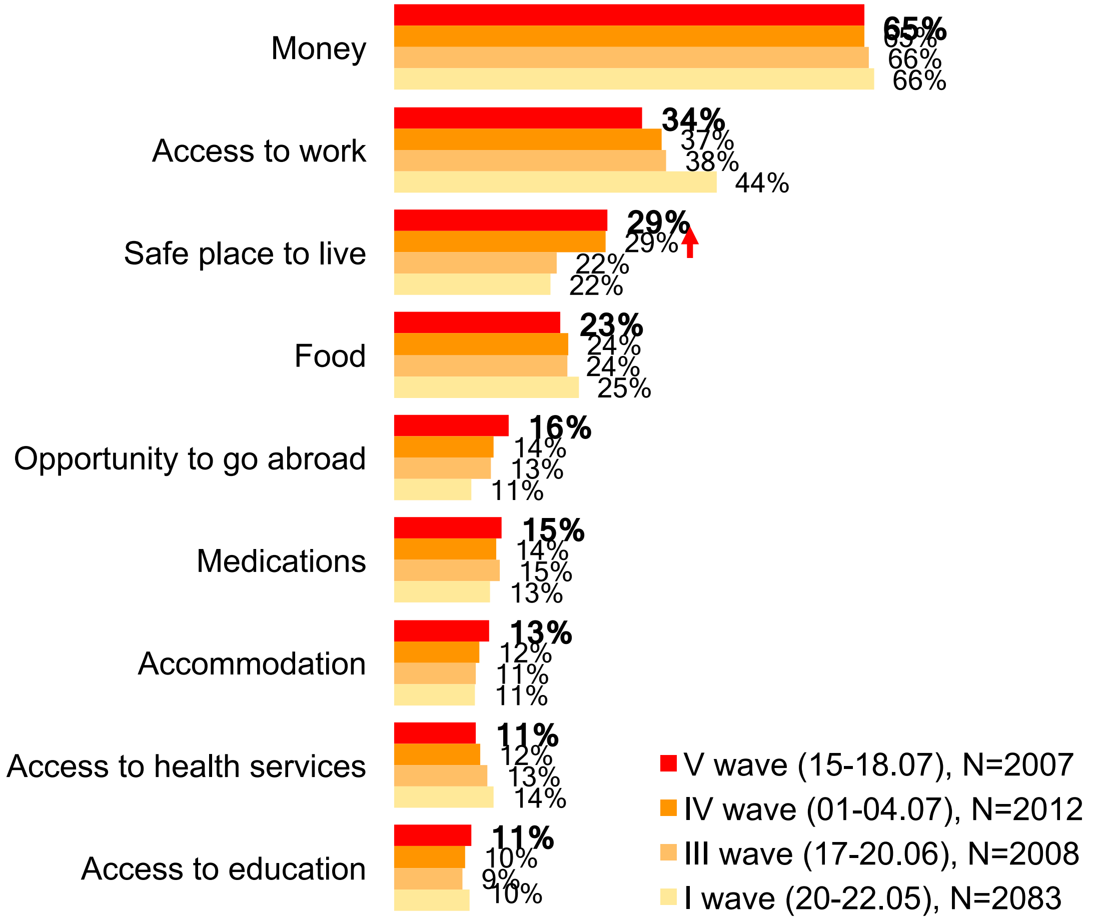
Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

EFFECT OF THE FULL-SCALE WAR ON UKRAINIANS'* LIVES

* Ukrainians - residents of cities with population of 50 thousand and more, aged 18-60 years, who use smartphones

THINGS THAT ARE NEEDED MOST

The rating of things that respondents feel the greatest need for has remained unchanged in the fifth wave. More than a third of respondents indicated the need for money (65%) and access to work (34%).



Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

Base: all respondents
As of today, what do you or your family need most?

FAMILIES' NEEDS

by migration status

Respondents who stayed at home* began to declare their need for housing more often, compared to the previous wave (from 4% to 7%). In general, respondents who stayed at home are less likely to need access to work (31% vs 34%) than the sample as a whole, while internal migrants, on the contrary, need it more often (43% vs 34%). At the same time, internal and external migrants more often feel the need for housing (24% and 20% vs 13%); also, the latter group is less likely to express the need for money (49% vs 65%) and food (16% vs 23%).

	Total	Stayed at home	Relocated within Ukraine	Relocated abroad
Money	65%	66%	68%	49%
Access to work	34%	31%	43%	29%
Safe place to live	29%	27%	34%	33%
Food	23%	22%	27%	16%
Opportunity to go abroad	16%	15%	19%	11…
Medications	15%	15%	15%	13…
Accommodation	13%	7% + 3%	24%	20%
Access to health services	11%	10%	12%	15%
Access to education	11%	10%	12%	8%
Base: N=	2007	1224	604	179

*"At home" here means the settlement where the permanent residence of the respondent is/was located

Base: all respondents

As of today, what do you or your family need most?

Numbers that are statistically significantly **higher** / **lower** for the group, compared to the sample as a whole

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

FAMILIES' NEEDS

by region

Compared to the previous wave, residents of the Eastern region began to express the need for access to work less often (from 49% to 41%); the same is true for access to health services (from 21% to 13%). At the same time, residents of the Western region began to mention access to health services more often (from 5% to 11%); they also began to express need for food less often (from 21% to 13%). Residents of the Southern region began to feel the need for the opportunity to relocate abroad more often (from 16% to 21%). In general, residents of the Eastern and Southern regions express a greater need for different things, compared to residents of other regions.

	Total	East	West	Kyiv	North	Centre	South
Money	65%	69%	60%	57%	69%	64%	71%
Access to work	34%	41% ↓ - 8%	28%	33%	36%	27%	43%
Safe place to live	29%	36%	24%	29%	23%	29%	34%
Food	23%	29%	13% ↓ -7%	21%	26%	19%	32%
Opportunity to go abroad	16%	14%	16%	16%	9%	15%	21% ↑ +5%
Medications	15%	20%	9%	12%	11%	12%	25%
Accommodation	13%	32%	7%	12%	10%	9%	10%
Access to health services	11%	13% ↓ - 6%	11% ↑ +6%	14%	6%	8%	15%
Access to education	11%	16%	12%	8%	6%	11%	10%
Base: N=	2012	319	306	346	205	483	348

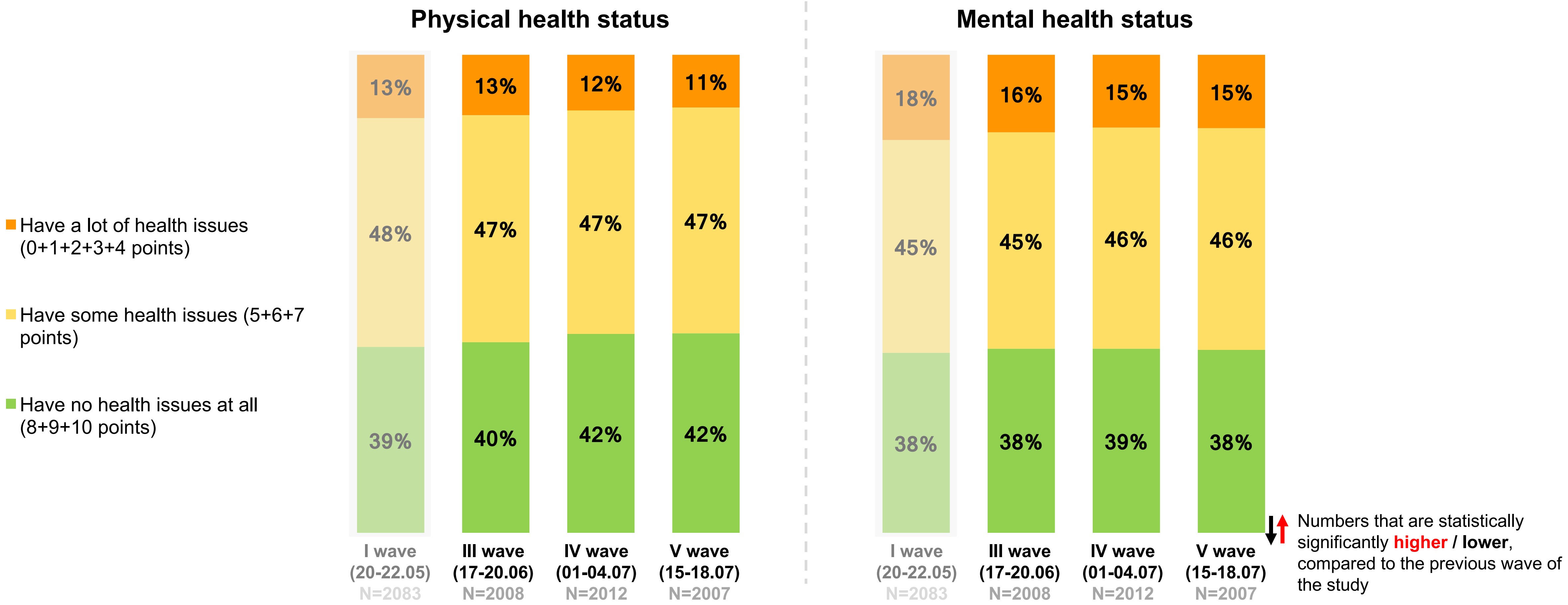
Base: all respondents
As of today, what do you or your family need most?

Numbers that are statistically significantly **higher** / **lower** for the group, compared to the sample as a whole

↓↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

SUBJECTIVE ASSESSMENT OF HEALTH

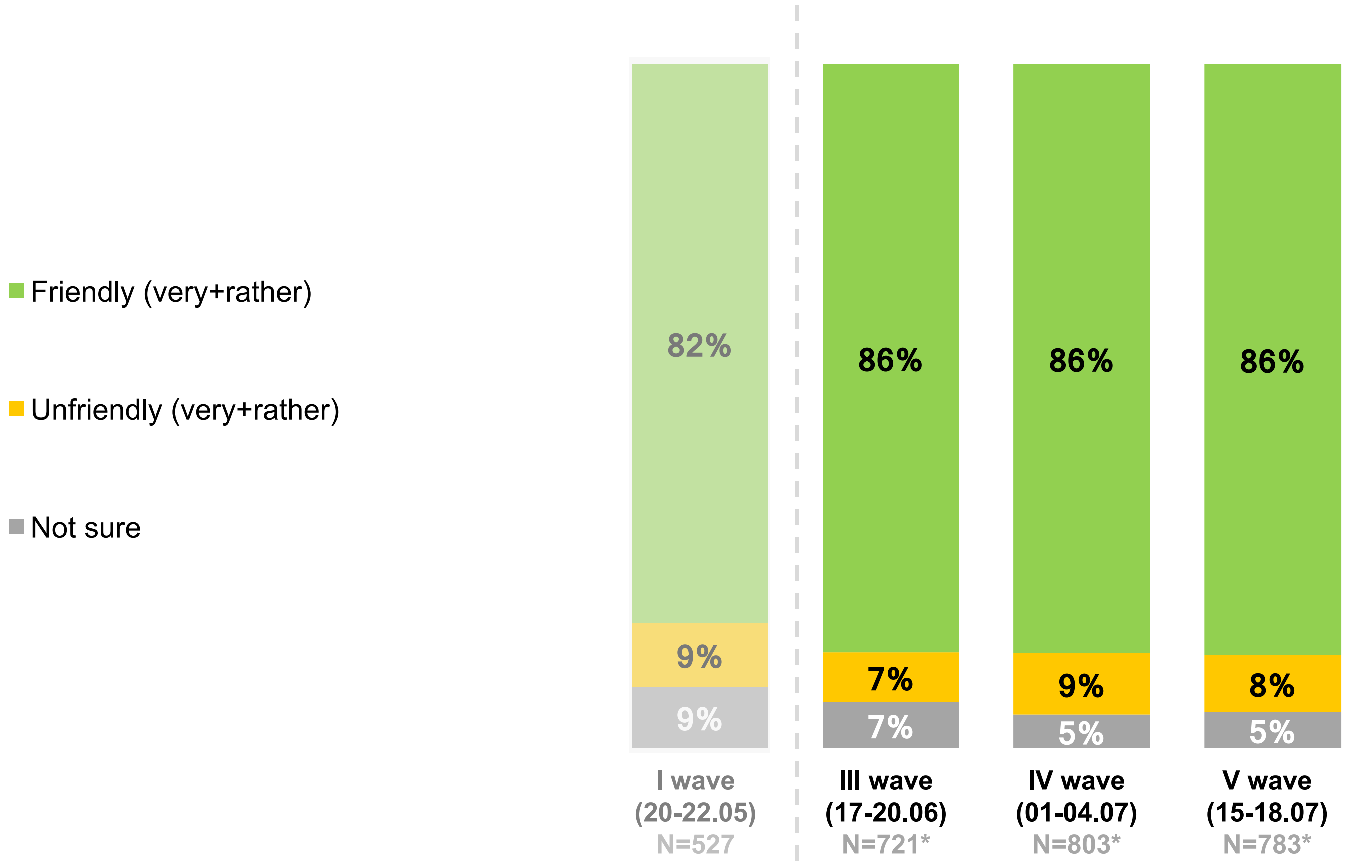
In the fifth wave, assessments of the state of physical and mental health remained unchanged compared to the fourth wave: about half (47% and 46%) of the respondents have some issues, 42% and 38% claim not to have any, and 11% & 15% have a lot of issues (according to their own declaration).



Base: all respondents
Please assess the state of your physical health on a scale of 0 to 10, where 0 means 'I have a lot of physical health issues' and 10 means 'I have no physical health issues at all'.
Please assess the state of your mental health on a scale of 0 to 10, where 0 means 'I have a lot of mental health issues' and 10 means 'I have no mental health issues at all'.

ATTITUDE OF THE LOCAL POPULATION

The vast majority (86%) of the audience that changed their place of residence continues to assess the attitude of the local population towards themselves as rather or very friendly; the opposite opinion is shared by 8% of respondents.

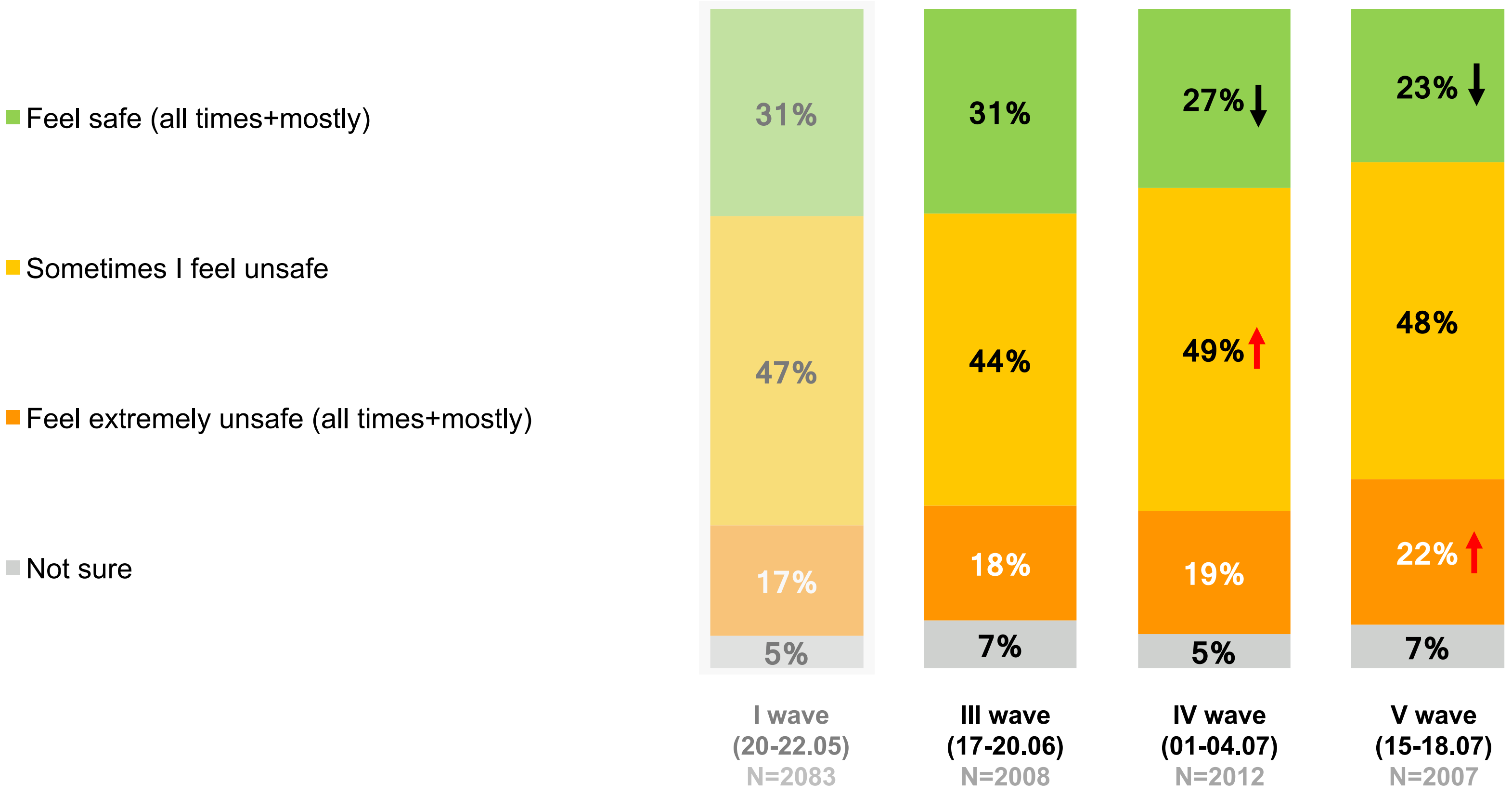


Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

Base: respondents who changed their locations
* In the second and third wave, those who stayed in a new place of residence or have already returned home were interviewed, in the first wave - only those who stayed in a new place. How would you describe the attitude of the local population towards you in the locality where you relocated because of war?

PERCEIVED SAFETY

Compared to the previous wave, the share of those who feel safe constantly or most of the time has decreased significantly (from 27% to 23%); at the same time, there was a significant increase in the share of people who do not feel safe constantly or most of the time (from 19% to 22%). About half (48%) of the respondents sometimes feel in danger (no changes compared to the previous wave).



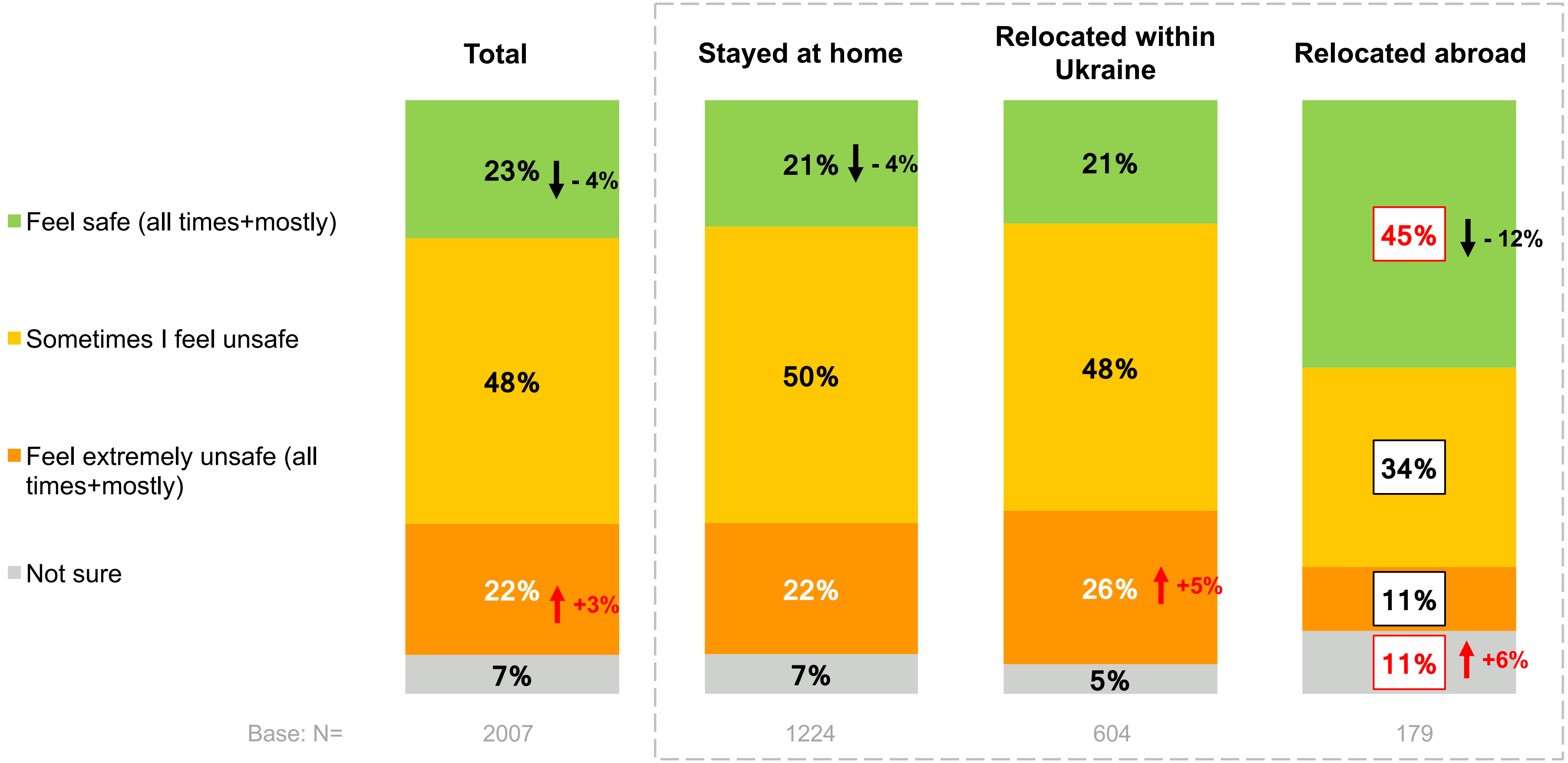
Base: all respondents
Which of the following statements best describes your current state?

Numbers that are statistically significantly higher / **lower**, compared to the previous wave of the study

PERCEIVED SAFETY

by migration status

Compared to the fourth wave, the share of those who feel safe constantly or most of the time among those who stayed at home (from 25% to 21%) and among external migrants (from 57% to 45%) decreased significantly; at the same time, there was a significant increase in the share of those who do not feel safe most of the time or constantly among internal migrants (from 21% to 26%).



Numbers that are statistically significantly **higher** / **lower** for the group, compared to the sample as a whole

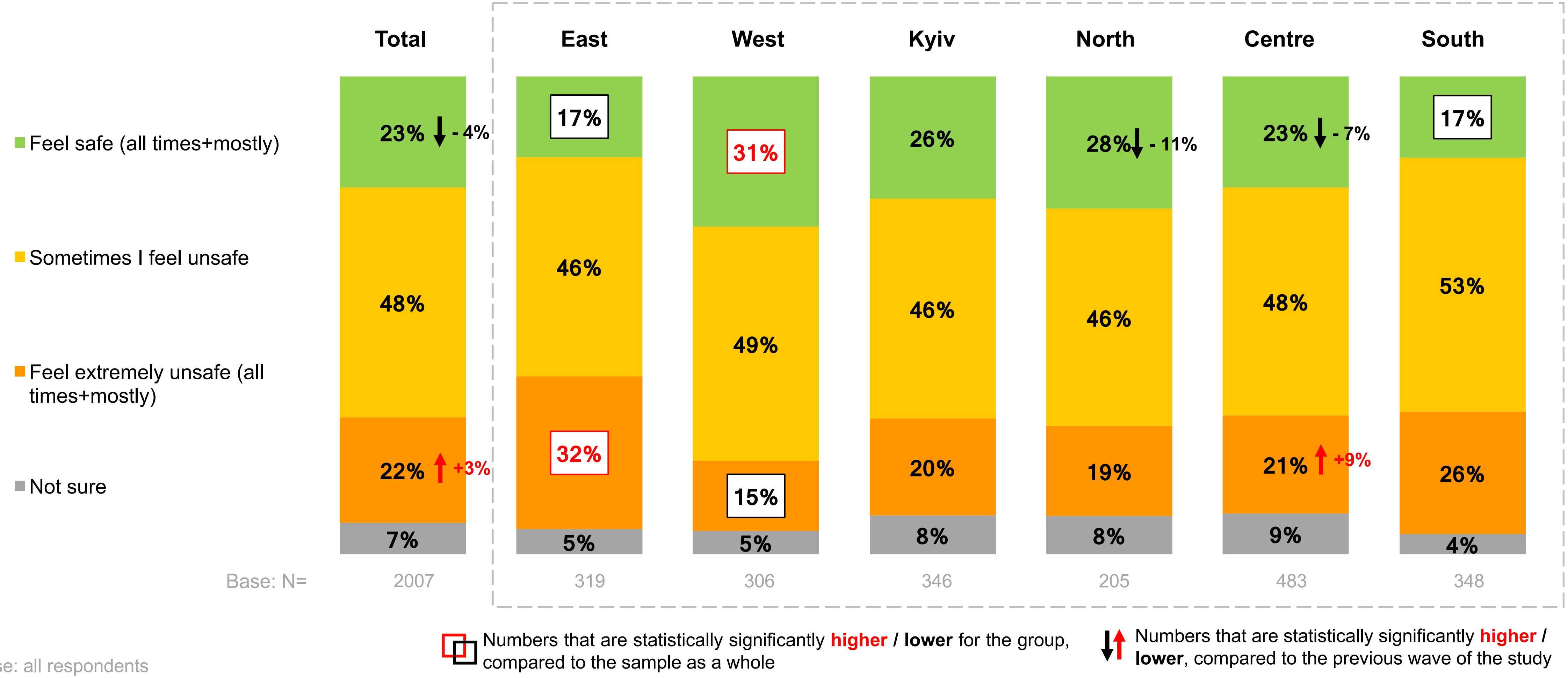
Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

Base: all respondents

Which of the following statements best describes your current state?

PERCEIVED SAFETY
by region

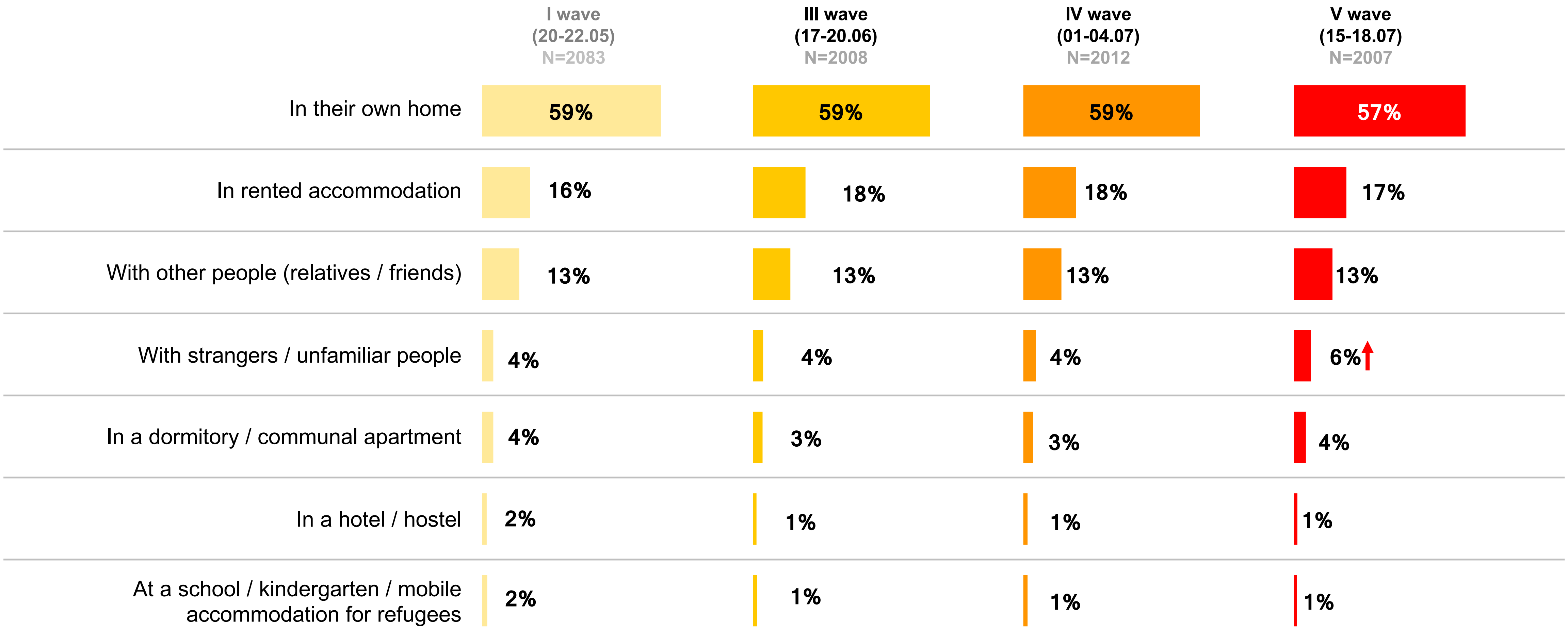
Compared to the previous wave, residents of the Northern and Central regions began to feel safe significantly less often. At the same time, there was a significant increase in the share of those who do not feel safe constantly or most of the time among the residents of the Central region (from 12% to 21%).



Base: all respondents
Which of the following statements best describes your current state?

CURRENT RESIDENCE

The vast majority of respondents (57%) continue to live in their own homes. Other common places of residence include rented housing (17%) and homes of friends and relatives (13%). Compared to the fourth wave, the share of those who live with unfamiliar people has increased significantly.



Base: all respondents
Where do you reside at the moment?

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

CURRENT RESIDENCE
by migration status

Compared to the fourth wave, the share of internally displaced persons who live with unfamiliar people has increased. In general, those who stayed at home more often live in their own dwelling, while migrants (external and internal) more often live in other places.

	Total	Stayed at home*	Relocated within Ukraine	Relocated abroad
In their own home	57%	75%	31%	23…
In rented accommodation	17%	13%	24%	26%
With other people (relatives / friends)	13%	7%	24%	16%
With strangers / unfamiliar people	6% +2%	1%	11% +4%	20%
In a dormitory / communal apartment	4%	3%	5%	5%
In a hotel / hostel	1%	0,4%	1%	5%
At a school / kindergarten / mobile accommodation for refugees	1%	0,1%	2%	3%
Base: N=	2007	1224	604	179

*Home here should be understood as the locality where the respondent's permanent place of residence is
Base: all respondents
Where do you reside at the moment?

Numbers that are statistically significantly **higher** / **lower** for the group, compared to the sample as a whole

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

CURRENT RESIDENCE

by region

Residents of the Eastern region declare current residence in their own home less often (24% vs 57%) compared to the sample as a whole, while residents of the Western, Northern and Central regions, conversely, live in their own homes more often. Compared to the fourth wave, the share of people from the Eastern region who stay in mobile accommodation for refugees has decreased, and the share of those who live with unfamiliar people has increased.

	Total	East	West	Kyiv	North	Centre	South
In their own home	57%	24%	72%	57%	66%	64%	59%
In rented accommodation	17%	30%	12%	16%	14%	16%	15%
With other people (relatives / friends)	13…	18%	9%	14%	13%	11%	13%
With strangers / unfamiliar people	6% ↑ +2%	16% ↑ +7%	2%	4%	2%	3%	7%
In a dormitory / communal apartment	4%	6%	3%	4%	3%	4%	3%
In a hotel / hostel	1%	2%	1%	2%		1%	1%
At a school / kindergarten / mobile accommodation for refugees	1%	2% ↓ -4%		1%	0,4%		1%
Base: N=	2007	319	306	346	205	483	348

Base: all respondents
Where do you reside at the moment?

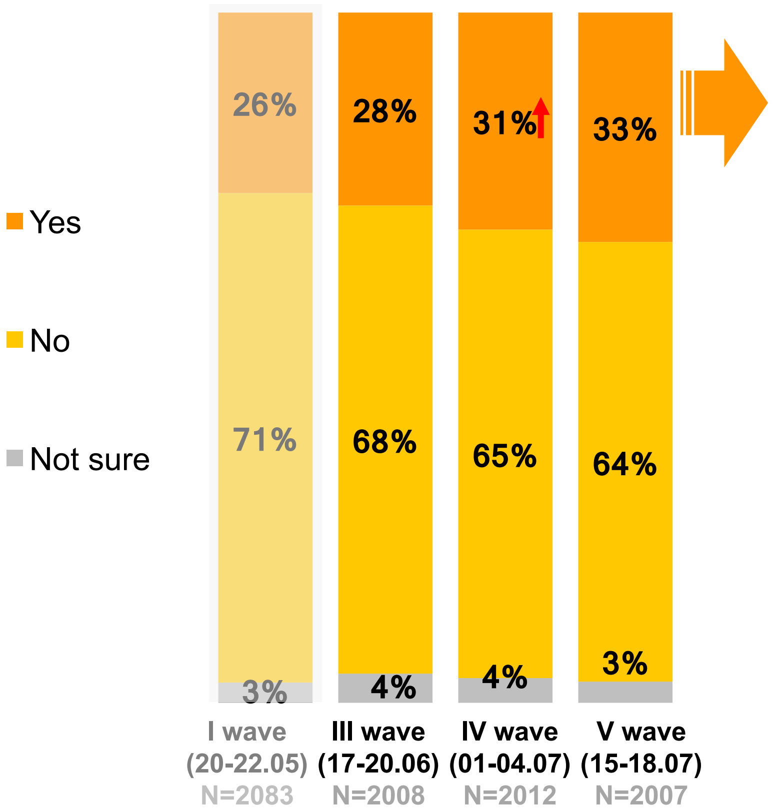
Numbers that are statistically significantly **higher** / **lower** for the group, compared to the sample as a whole

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

HUMANITARIAN AID FROM THE UKRAINIAN GOVERNMENT

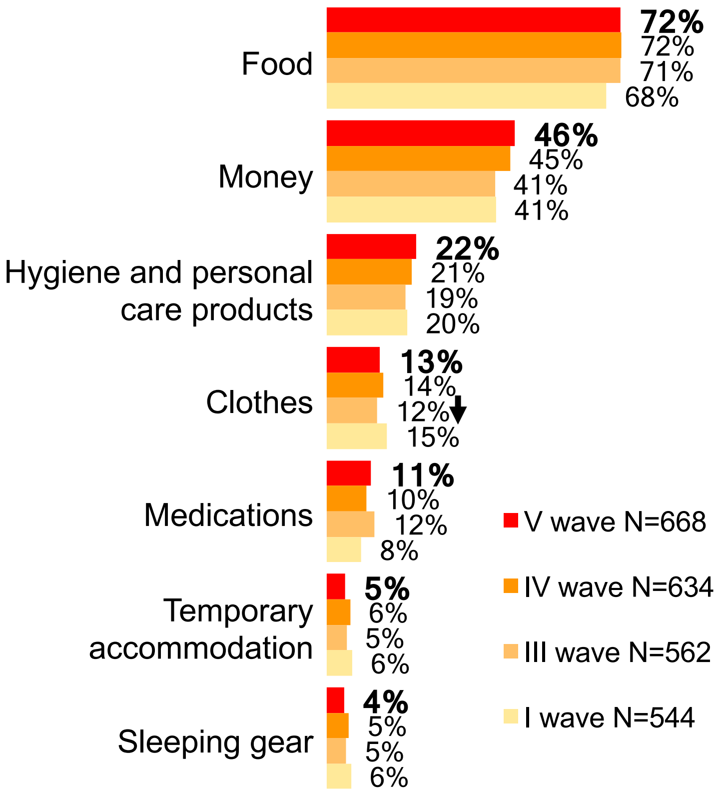
In the fifth wave, the share of those who received humanitarian aid from the Ukrainian state has not changed significantly and is at 33%. The share of respondents who consider this assistance to be sufficient has also not changed and is at 46%. When it comes to the form of aid, this distribution also remained without significant changes: most often people receive the aid in the form of food and money.

Reception of humanitarian aid from the government



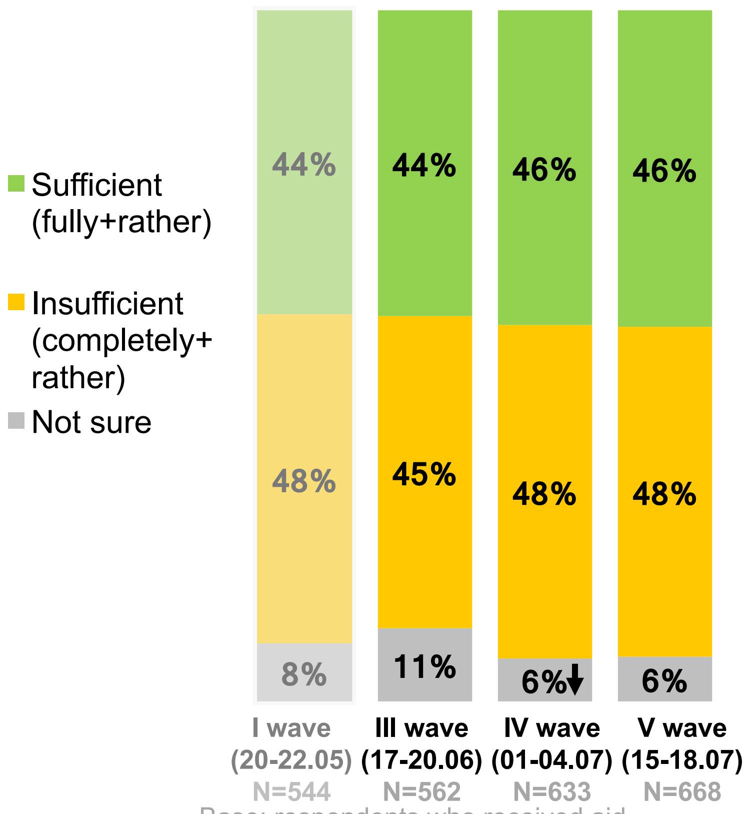
Base: all respondents

Type of humanitarian aid



Base: respondents who received aid from government

Sufficiency of the humanitarian aid



Base: respondents who received aid from government

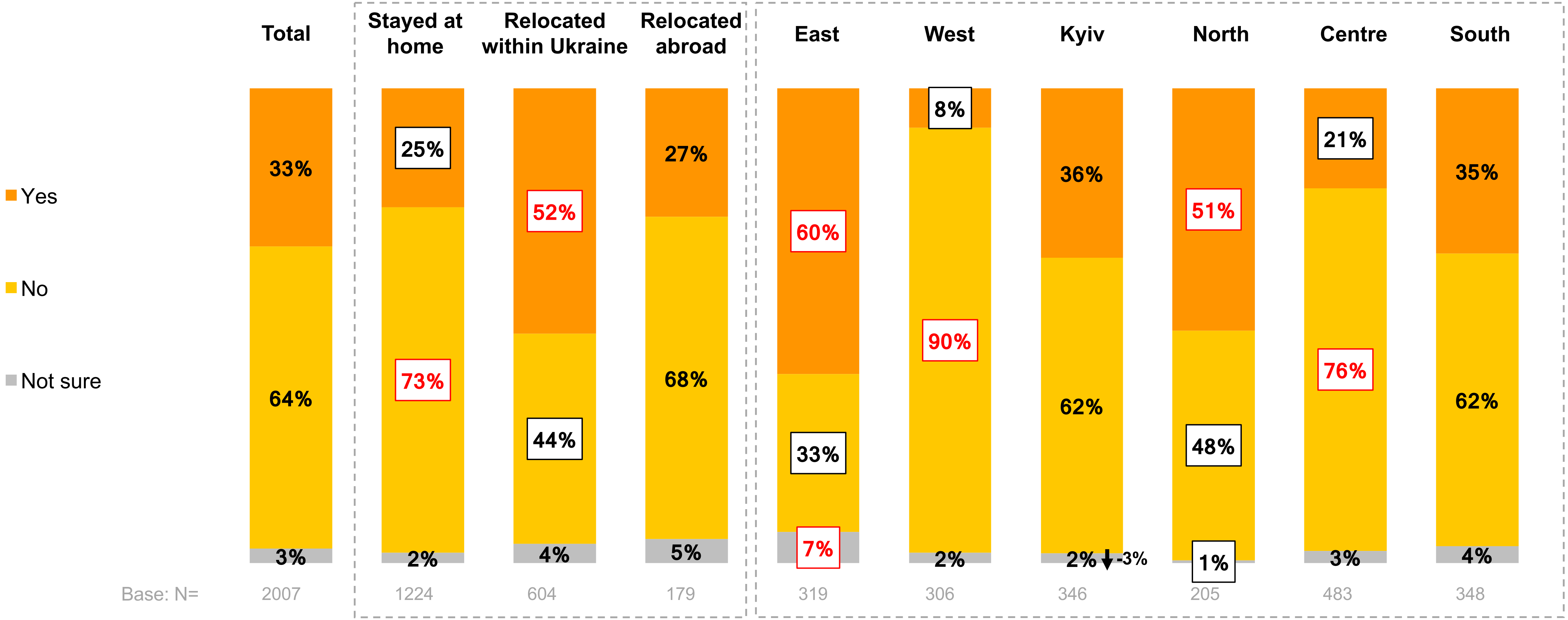
Have you or your family received humanitarian aid from the Ukrainian government?
What kind of humanitarian aid did you or your family receive from the Ukrainian government?
How would you assess the humanitarian aid provided to you or your family by the Ukrainian government?

Numbers that are statistically significantly higher / **lower**, compared to the previous wave of the study

HUMANITARIAN AID RECEIVED FROM THE UKRAINIAN GOVERNMENT

by migration status and region

Compared to the fourth wave, there were no significant changes in the receipt of humanitarian aid from the Ukrainian government depending on migration status and region. Most often humanitarian aid from the state was received by internally displaced persons and residents of the Eastern and Northern regions.



Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

Numbers that are statistically significantly **higher** / **lower** for the group, compared to the sample as a whole

Base: all respondents

Have you or your family received humanitarian aid from the Ukrainian government?

TYPE OF HUMANITARIAN AID RECEIVED FROM THE UKRAINIAN GOVERNMENT

by migration status and region

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Compared to the previous wave, there was a recorded increase in the shares of those who received aid from the government in the form of money (from 37% to 51%) and hygiene products (from 11% to 21%) among the residents of Southern region. Also, there was a decrease in the share of internally displaced persons who state having received sleeping gear (from 9% to 5%).

	Total	Stayed at home	Relocated within Ukraine	Relocated abroad	East	West	Kyiv	North	Centre	South
Food	72%	76%	69%	56%	85%	42%	59%	75%	60%	75%
Money	46%	35%	56%	50%	43%	63%	59%	31%	40%	51% ↑ +14%
Hygiene and personal care products	22%	13%	30%	23%	24%	18%	31%	14%	17%	21% ↑ +10%
Clothes	13%	8%	18%	14%	12%	37%	13%	16%	11%	7%
Medications	11%	4%	17%	14%	7%	17%	9%	26%	10%	5%
Temporary accommodation	5%	0,2%	8%	11%	6%	11%	5%	5%	3%	1%
Sleeping gear	4%	3%	5% ↓ -4%	11%	5%	6%	4%	2%	7%	3%
Base: N=	668	307	312	49	192	25*	123	105	102	121

** Insufficient base for analysis (observation of trend)*

Base: respondents who received aid from government

What kind of humanitarian aid did you or your family receive from the Ukrainian government?

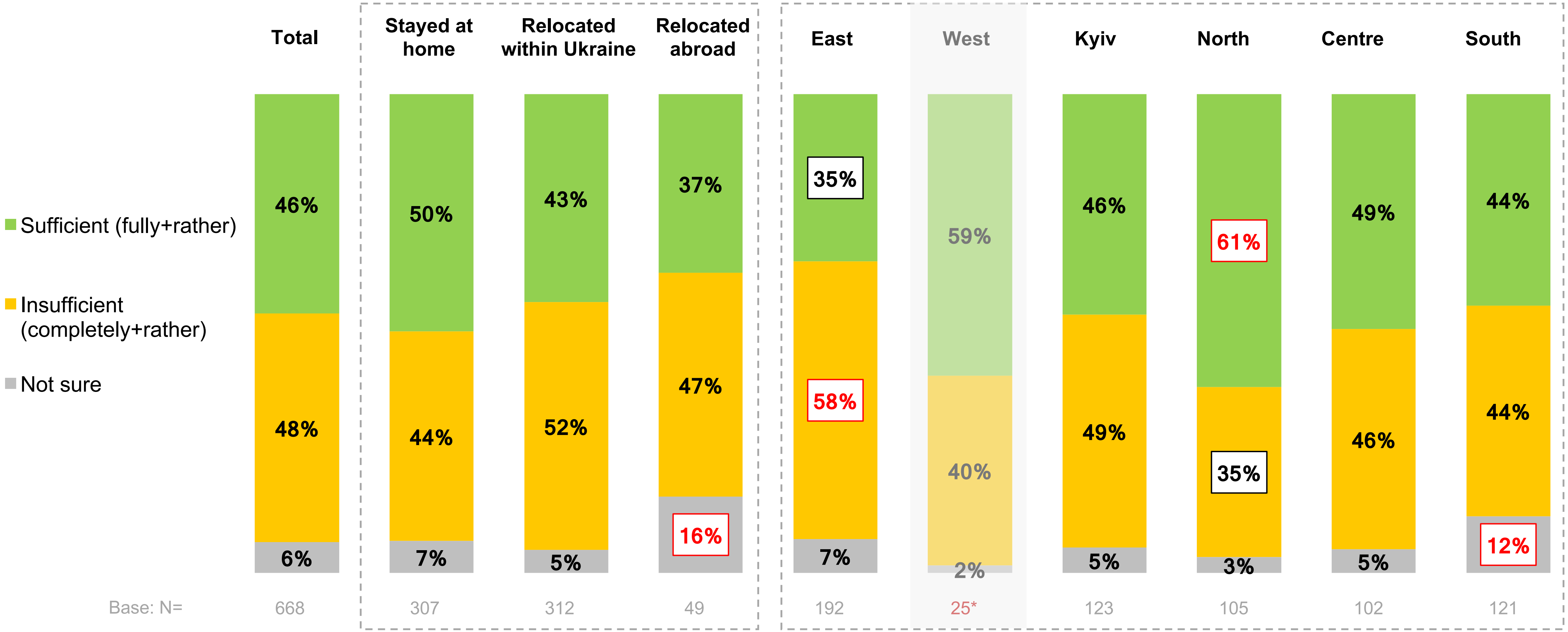
↓↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

Numbers that are statistically significantly **higher** / **lower** for the group, compared to the sample as a whole

SUFFICIENCY OF THE HUMANITARIAN AID RECEIVED FROM THE UKRAINIAN GOVERNMENT

by migration status and region

There were no recorded significant changes in the assessment of sufficiency of the humanitarian aid among different migration and regional groups.



** Insufficient base for analysis (observation of trend)*

Base: respondents who received aid from government

How would you assess the humanitarian aid provided to you or your family by the Ukrainian government?

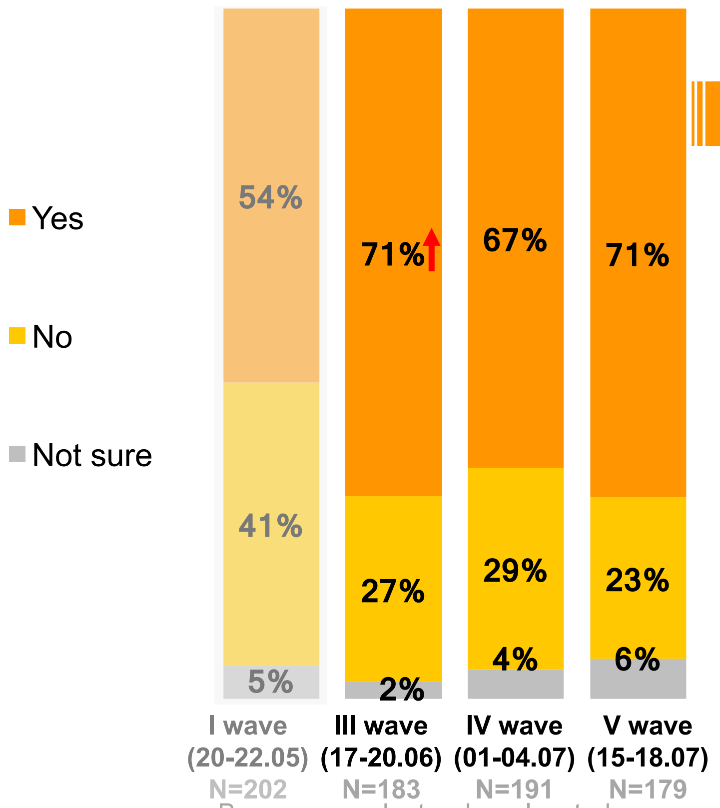
Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

Numbers that are statistically significantly **higher** / **lower** for the group, compared to the sample as a whole

HUMANITARIAN AID FROM THE FOREIGN GOVERNMENT

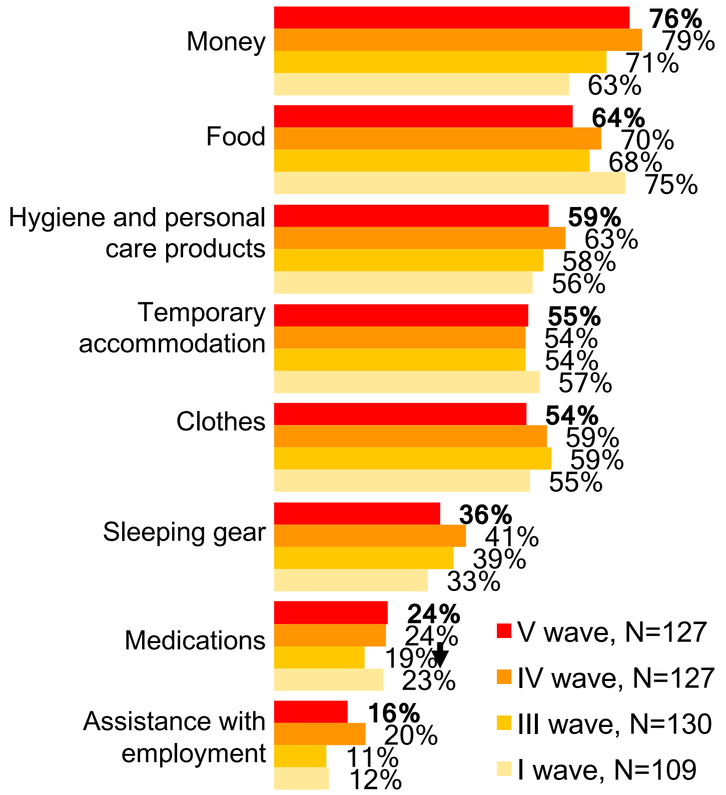
The share of respondents among those who went abroad and who received humanitarian aid from the government of the country in which they were located has not changed significantly and is at 71%. 79% evaluated that assistance as sufficient; also, there was a significant increase in the share of respondents who found it difficult to evaluate assistance according to this parameter. Respondents mainly receive money (76%), food (64%), hygiene products (59%), and temporary housing (55%).

Reception of humanitarian aid from the government



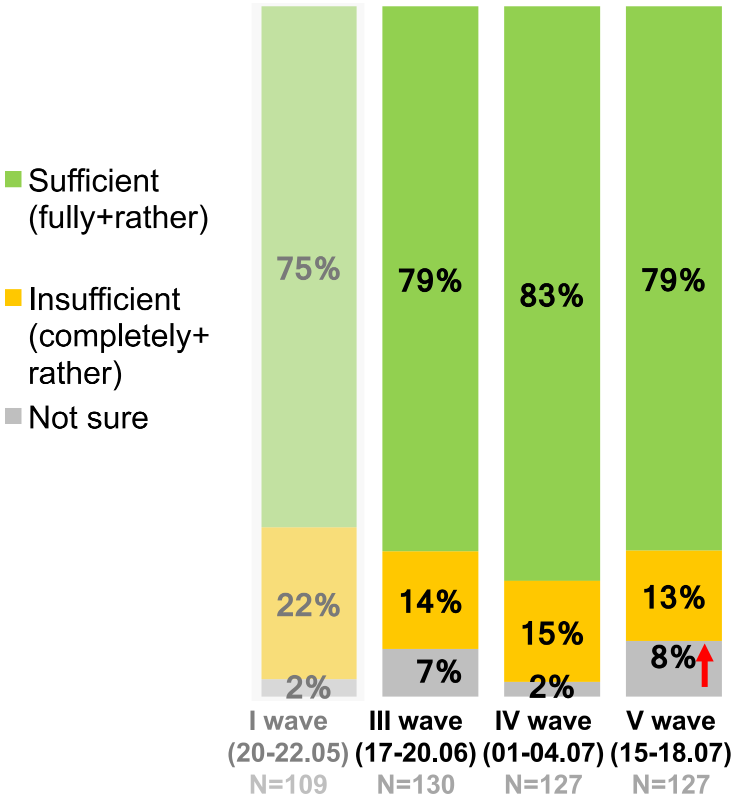
Base: respondents who relocated abroad

Type of humanitarian aid



Base: respondents who received aid from foreign government

Sufficiency of the humanitarian aid



Base: respondents who received aid from foreign government

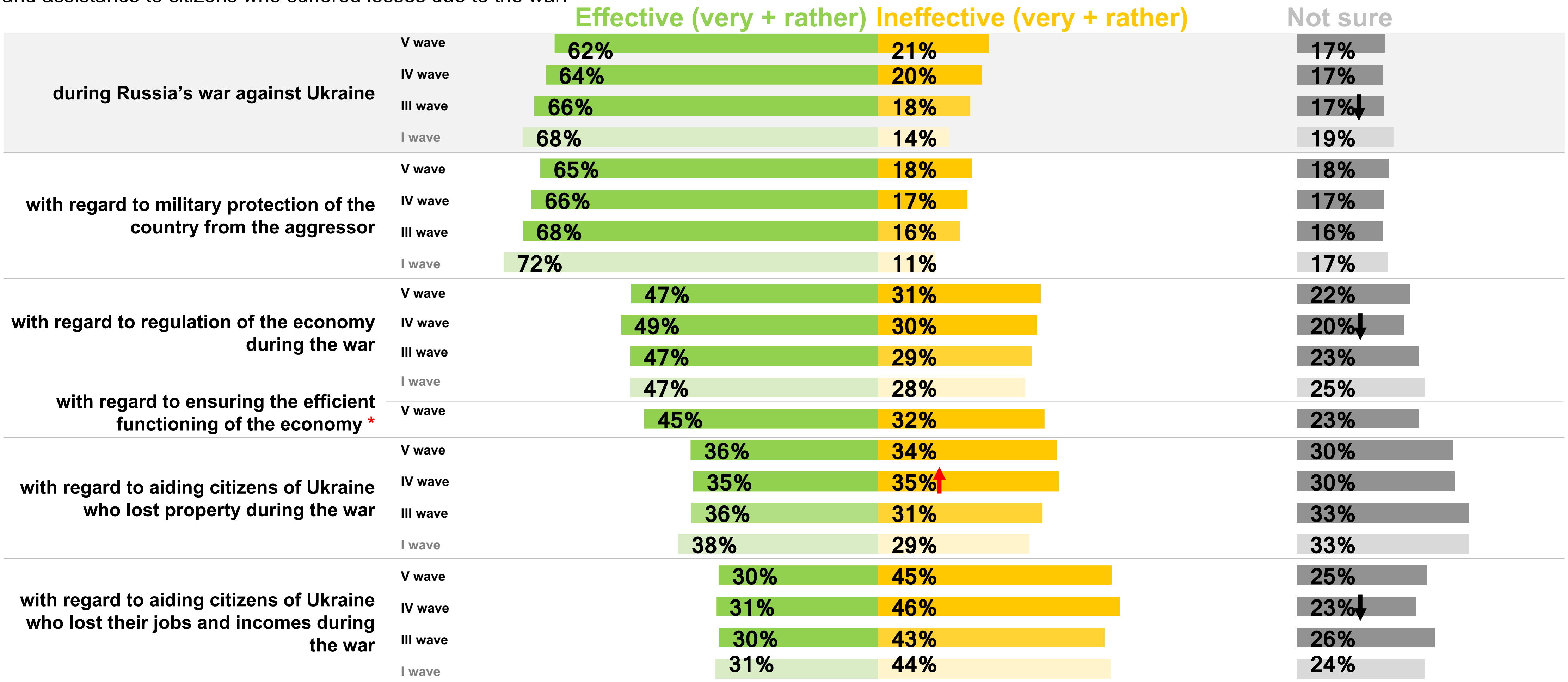
Have you or your family received humanitarian or financial aid from the local government of the country you currently reside? What kind of humanitarian aid did you or your family receive from the local government of the country you currently reside? How would you assess the aid provided to you or your family by the local government of the country you currently reside?

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

PERCEPTION OF THE FULL-SCALE WAR WITH RUSSIA

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES…

In the fifth wave, there were no significant changes in the evaluation of the effectiveness of the Ukrainian authorities' actions. More than half of the respondents consider the actions of the authorities since the beginning of the war in general and in the field of military protection in particular to be effective (62% and 65%, respectively). The lower evaluations of effectiveness of the actions are in the field of the economy and assistance to citizens who suffered losses due to the war.



Base: all respondents: I wave - N = 2083, III wave - N = 2008, IV wave – N = 2012, V wave – N = 2007

How effective do you consider the actions of the Ukrainian authorities: during Russia's war against Ukraine / with regard to military protection of the country from the aggressor / with regard to regulation of the economy during the war / with regard to ensuring the efficient functioning of the economy * / with regard to aiding citizens of Ukraine who lost property during the war / with regard to aiding citizens of Ukraine who lost their jobs and incomes during the war?

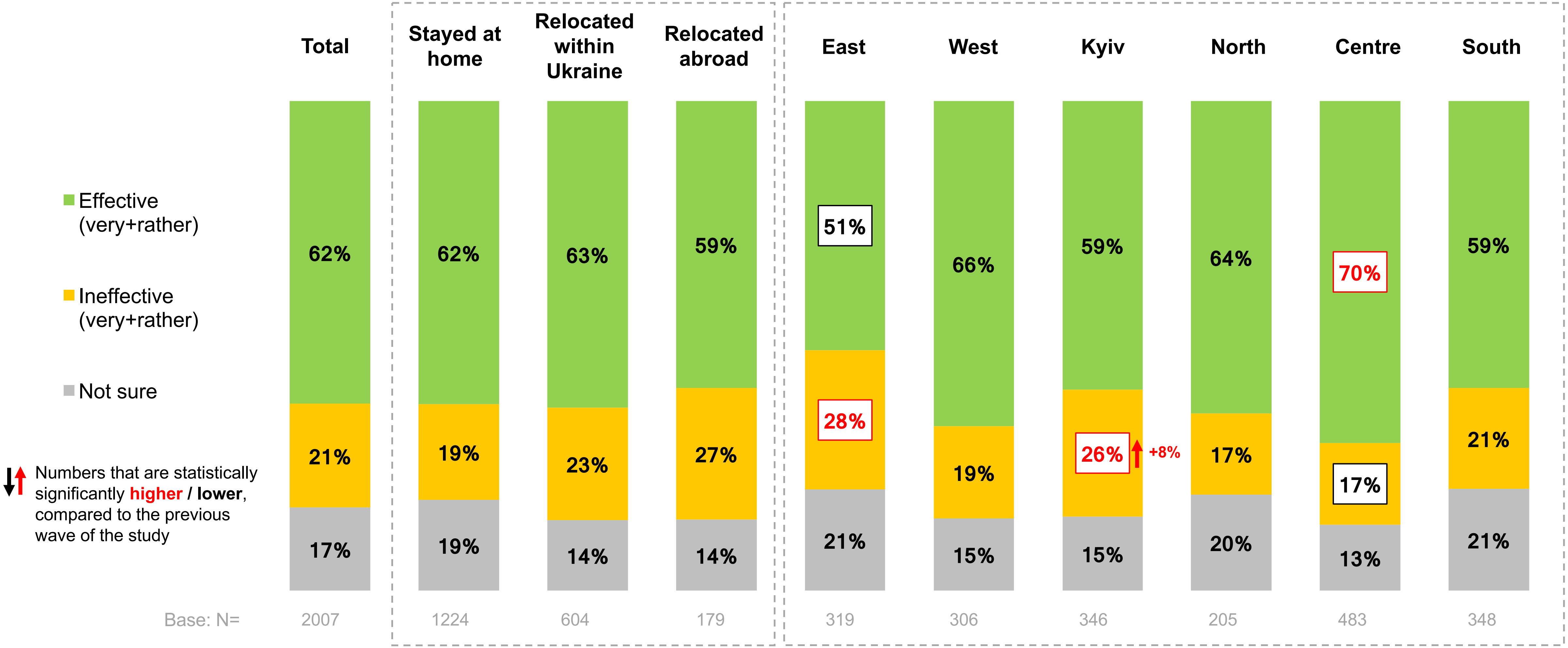
* This question was included in the questionnaire in the fifth wave

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

during Russia's war against Ukraine

by migration status and region



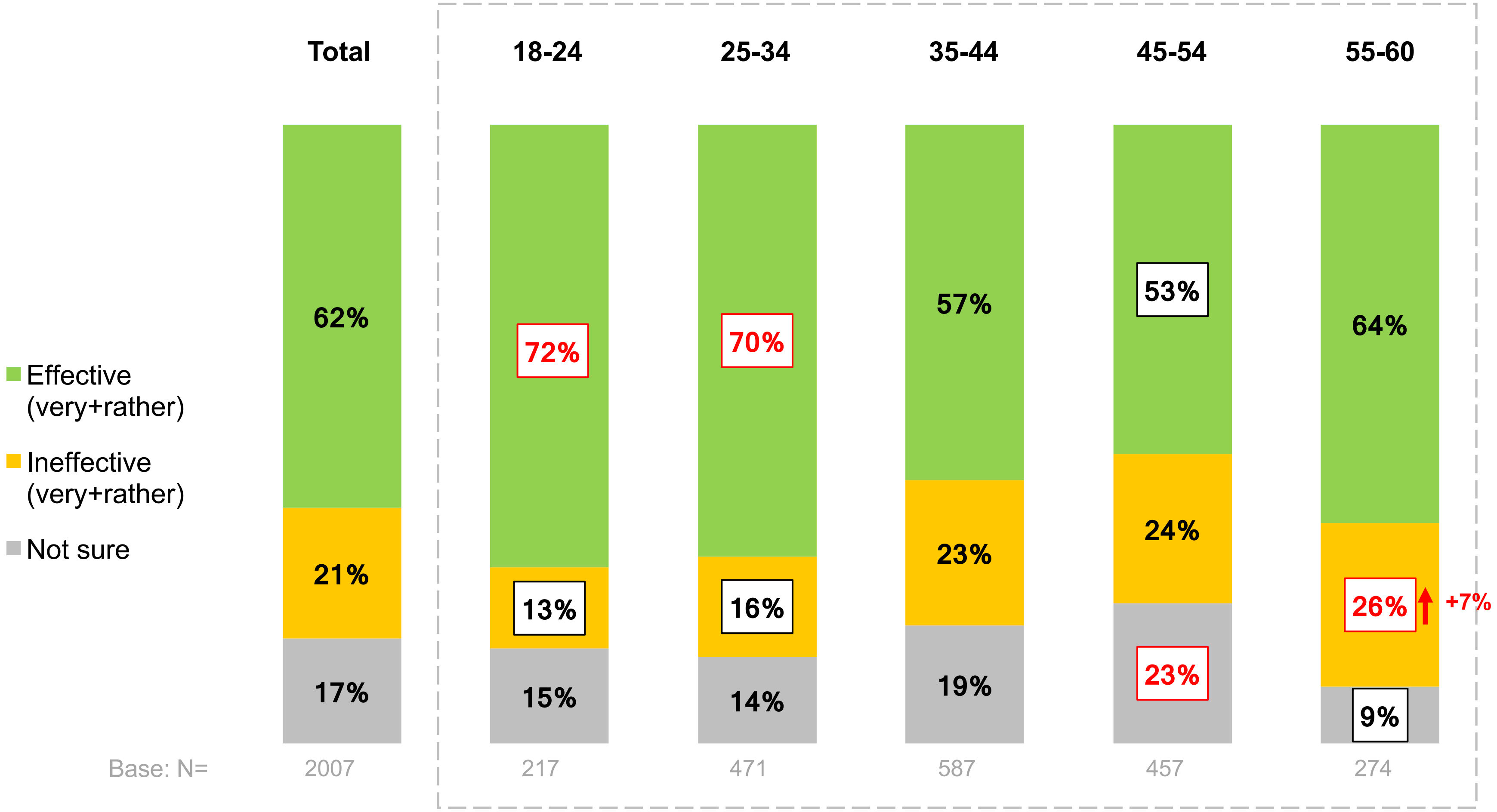
Base: all respondents
How effective do you consider the actions of the Ukrainian authorities during Russia's war against Ukraine?

Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

during Russia's war against Ukraine

by age



Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

Base: all respondents

How effective do you consider the actions of the Ukrainian authorities during Russia's war against Ukraine?

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

with regard to military protection of the country from the aggressor by migration status and region

Gradus

Centre for Economic Recovery

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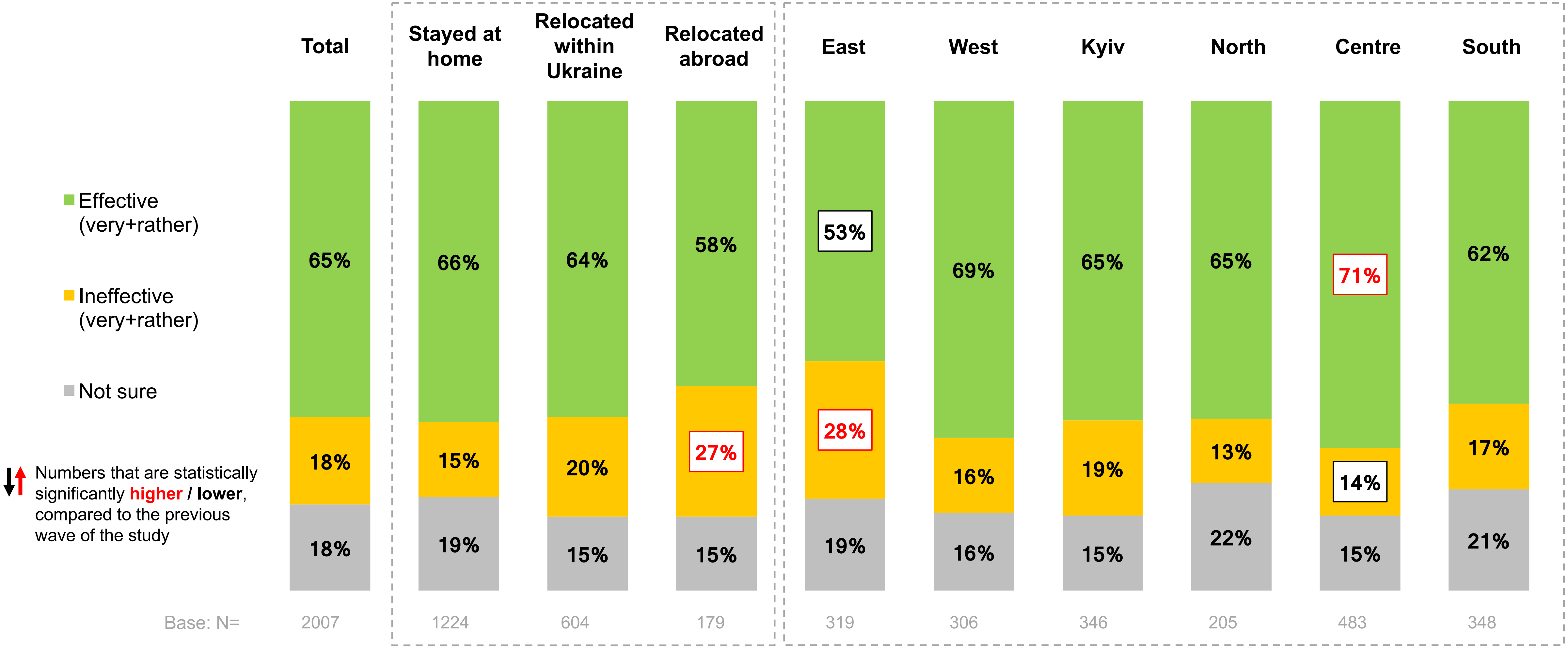


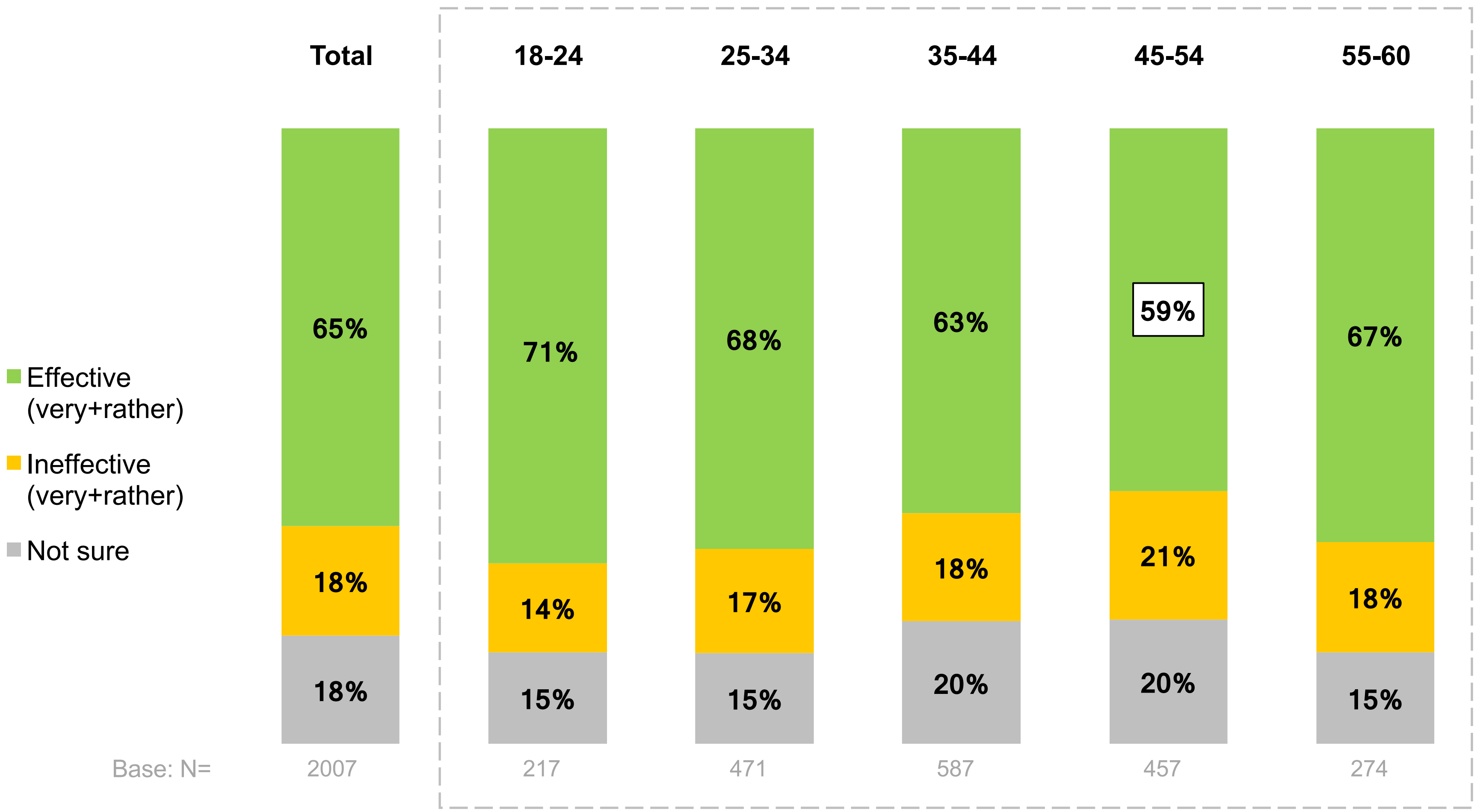
Base: all respondents

How effective do you consider the actions of the Ukrainian authorities with regard to military protection of the country from the aggressor?

Numbers that are statistically significantly **higher** / **lower** a group, compared to the sample as a whole

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

with regard to military protection of the country from the aggressor by age



Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

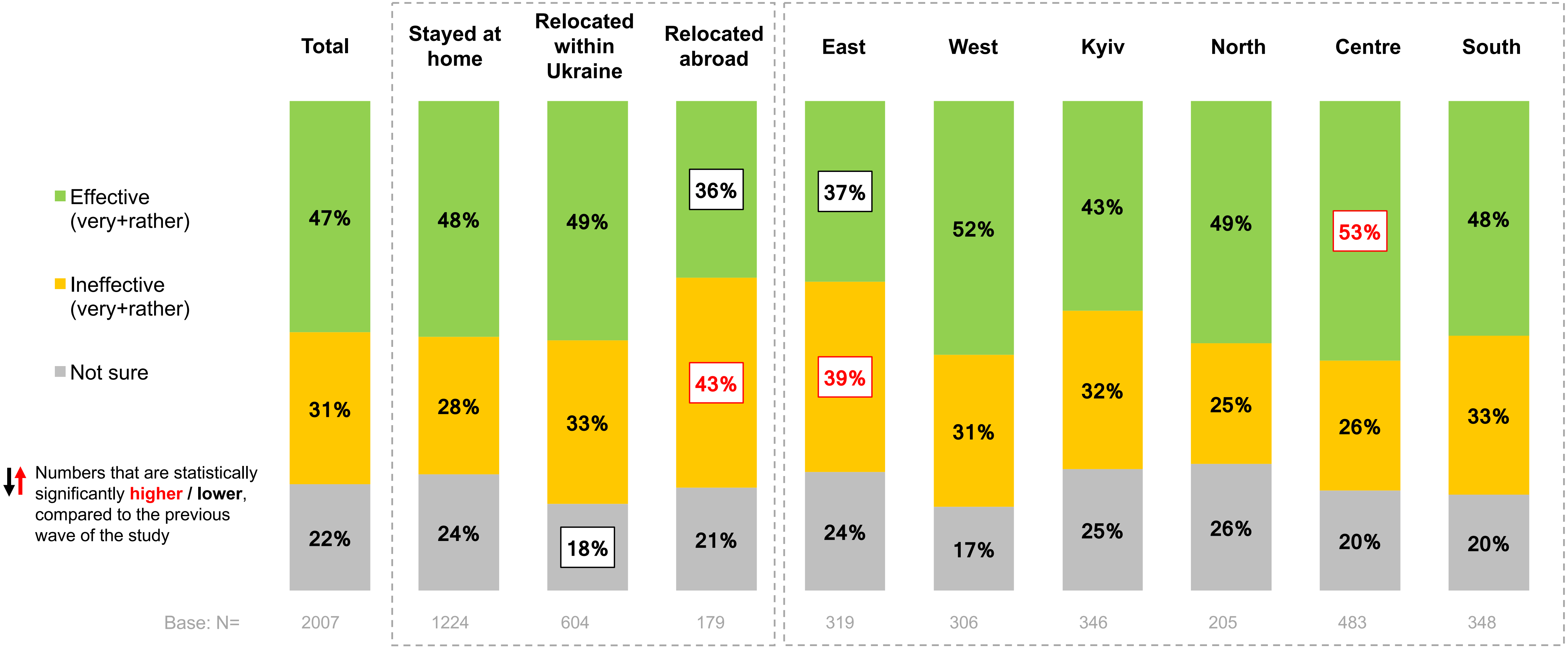
Base: all respondents

How effective do you consider the actions of the Ukrainian authorities with regard to military protection of the country from the aggressor?

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

with regard to regulation of the economy during the war

by migration status and region



Base: all respondents
How effective do you consider the actions of the Ukrainian authorities with regard to regulation of the economy during the war?

Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES
with regard to regulation of the economy during the war
by age

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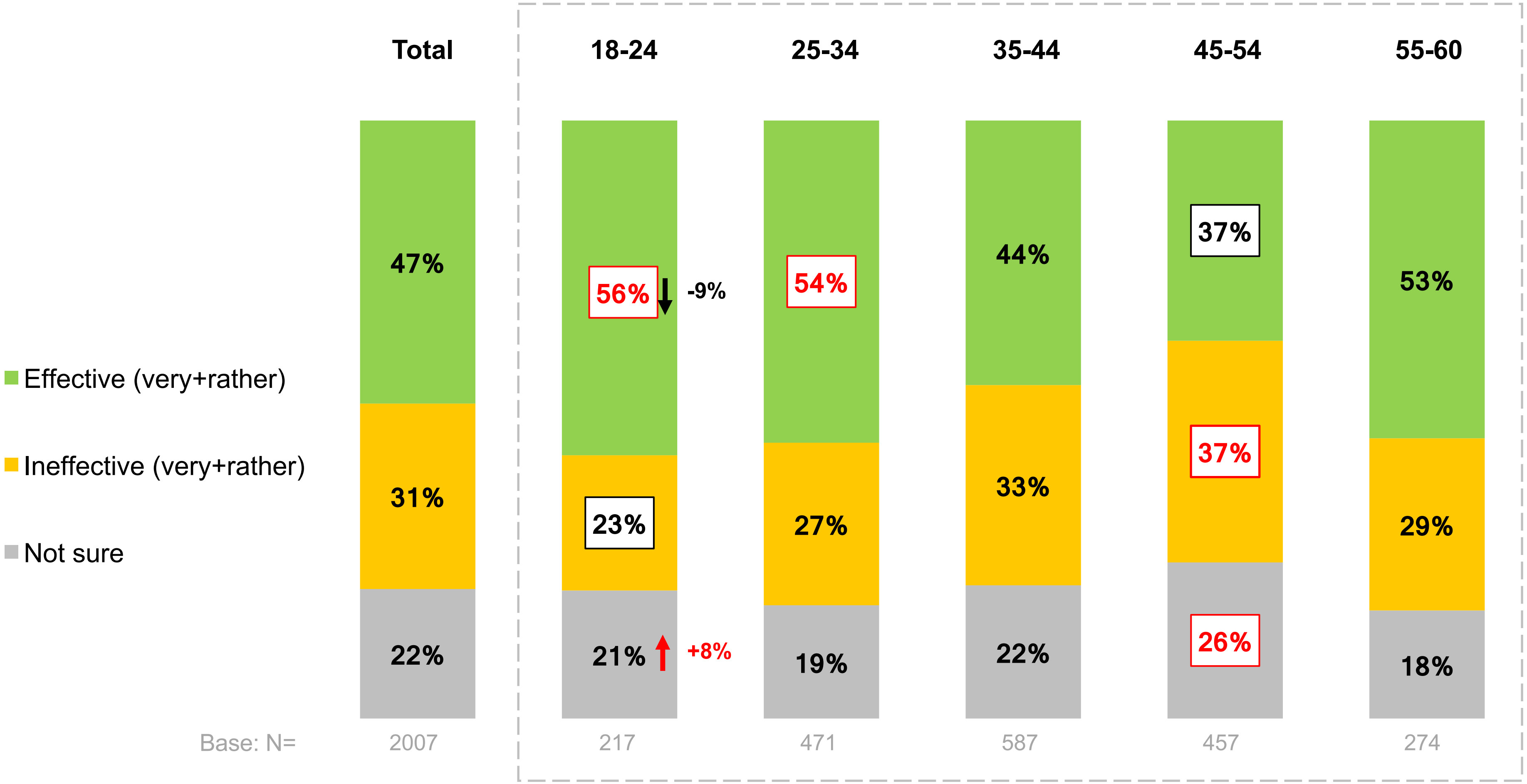


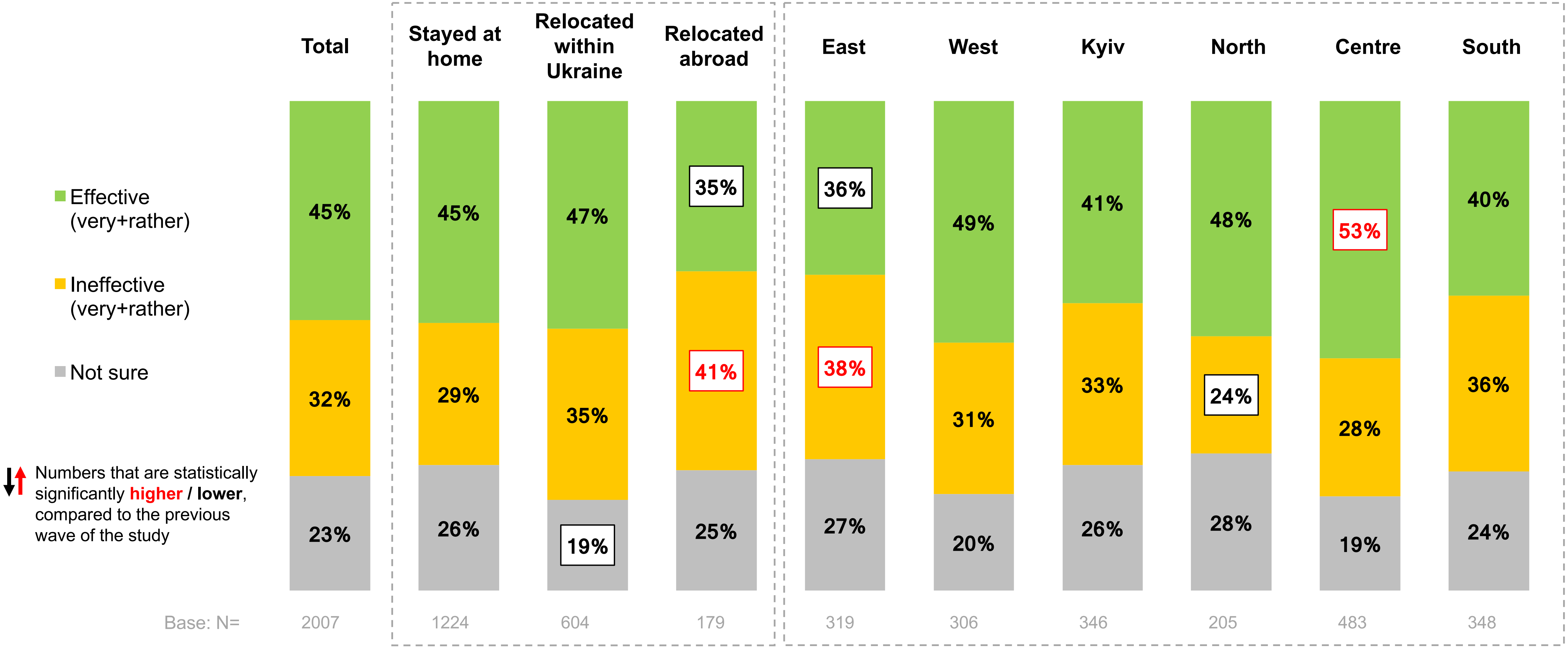
Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

Base: all respondents

How effective do you consider the actions of the Ukrainian authorities with regard to regulation of the economy during the war?

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES
with regard to ensuring the efficient functioning of the economy
by migration status and region



Base: all respondents
How effective do you consider the actions of the Ukrainian authorities with regard to ensuring the efficient functioning of the economy?

Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

with regard to ensuring the efficient functioning of the economy

by age

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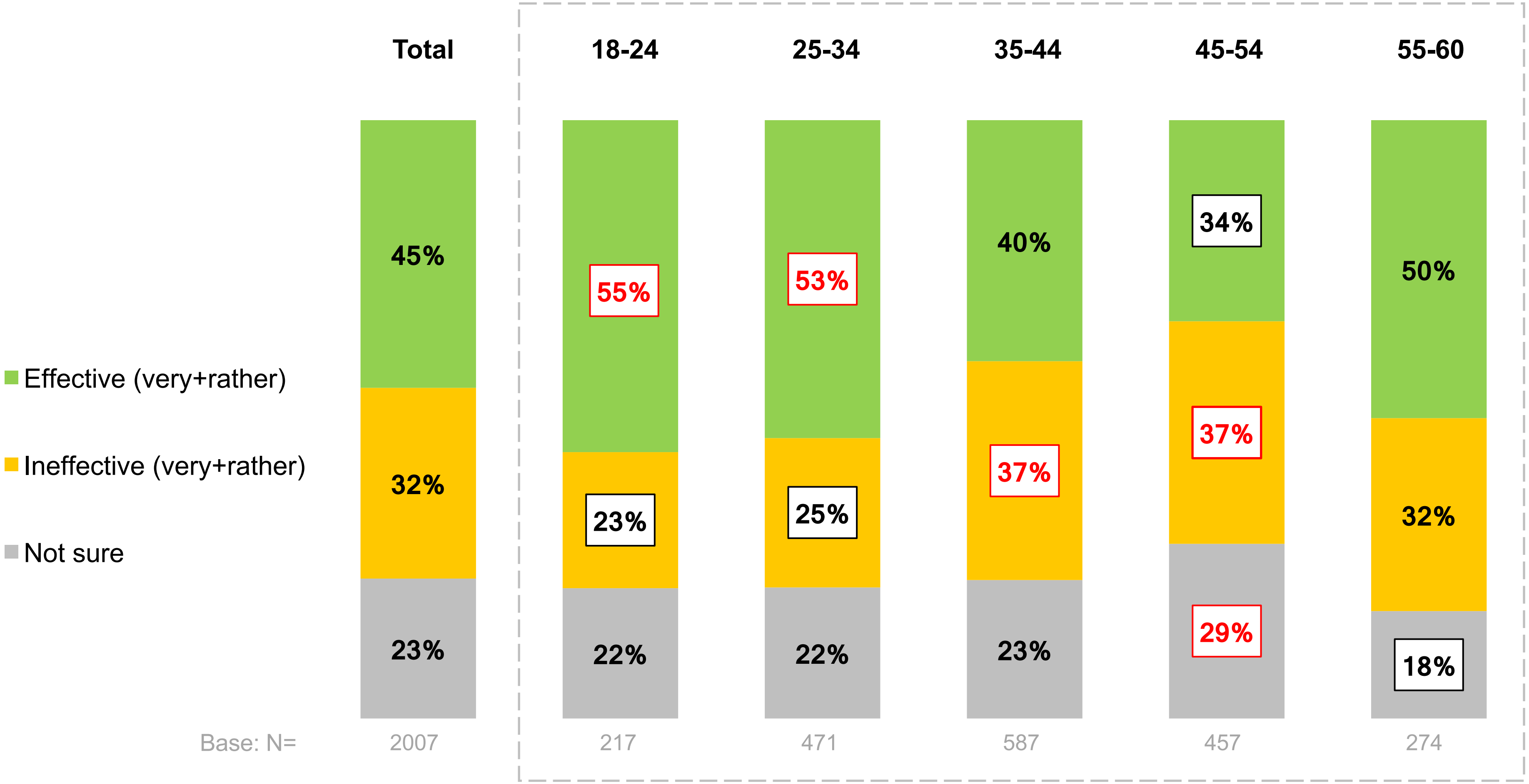


Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

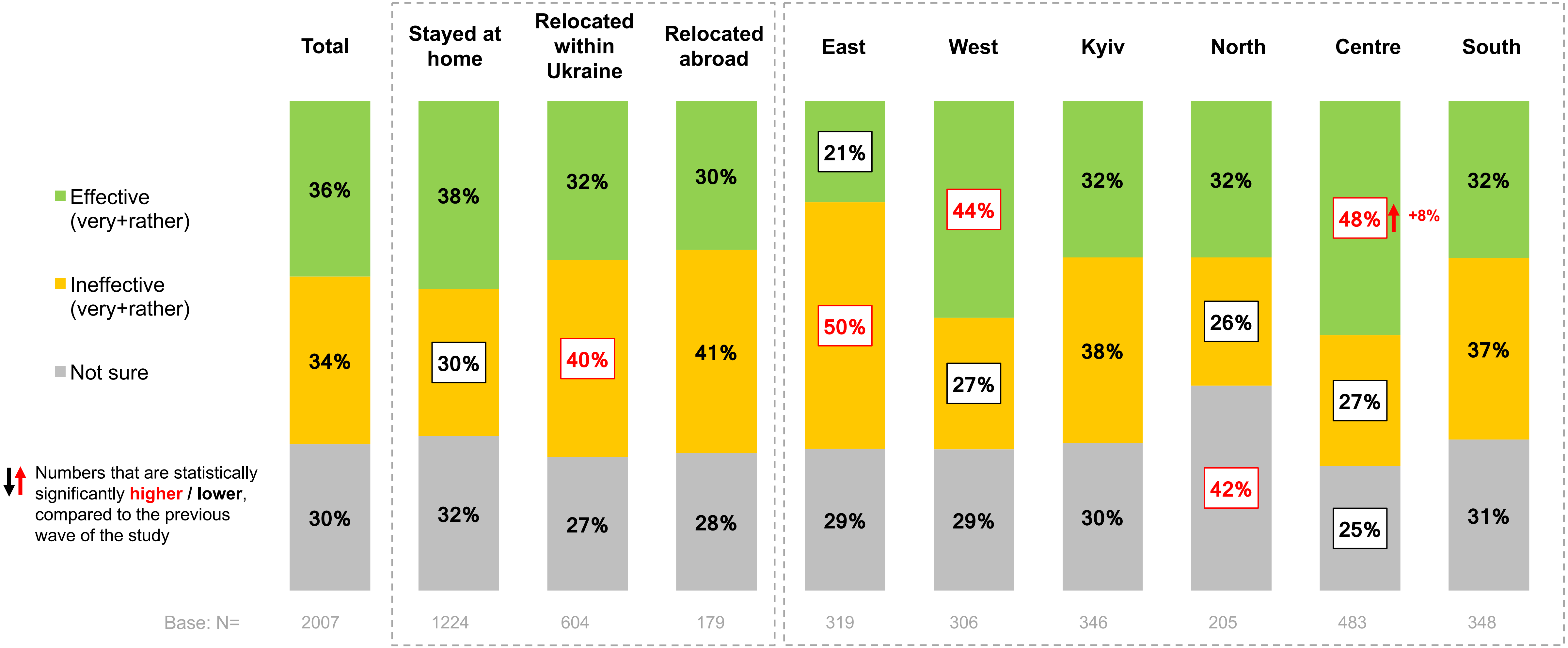
Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

Base: all respondents
How effective do you consider the actions of the Ukrainian authorities with regard to ensuring the efficient functioning of the economy?

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

with regard to aiding citizens of Ukraine who lost property during the war

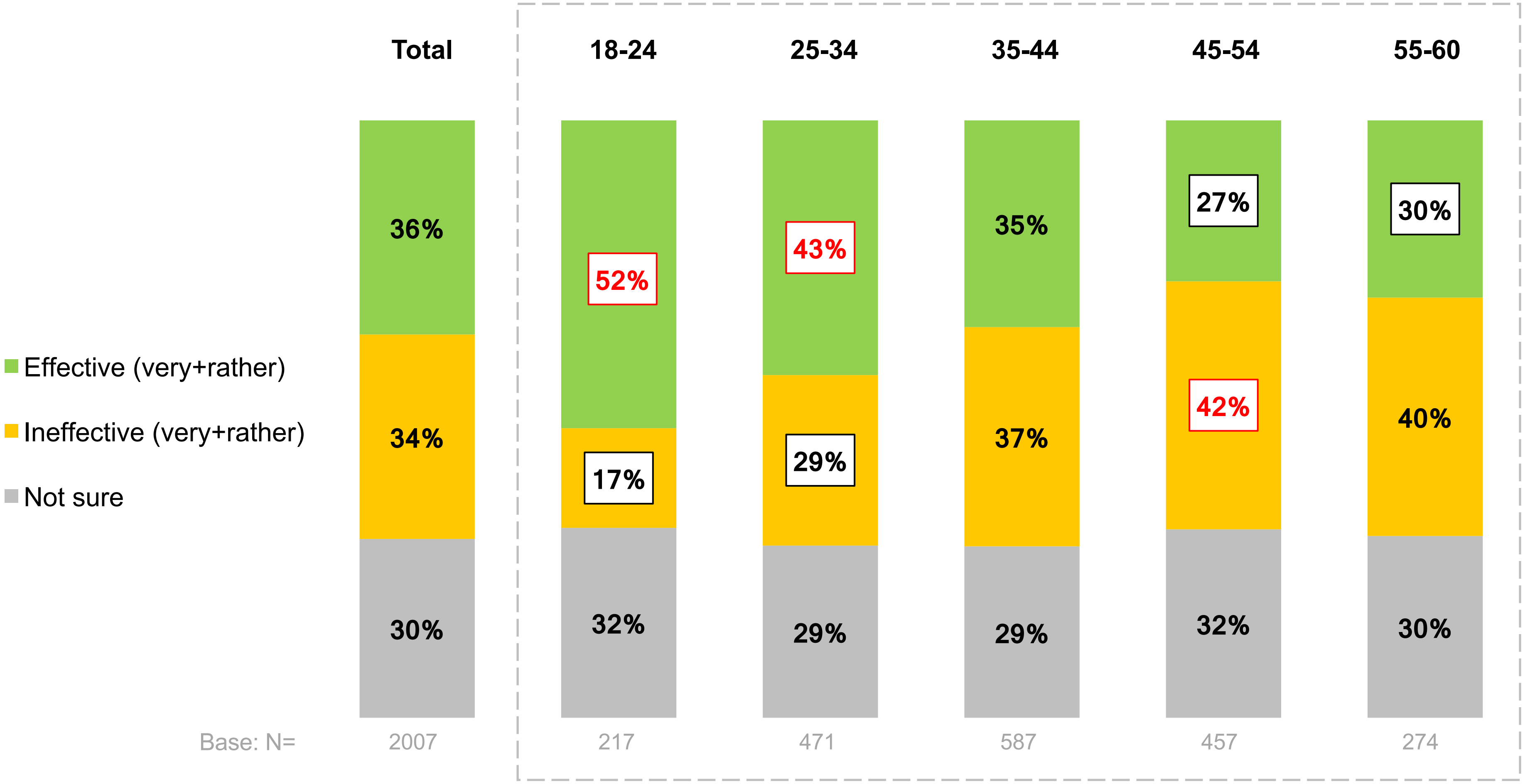
by migration status and region



Base: all respondents
How effective do you consider the actions of the Ukrainian authorities with regard to aiding citizens of Ukraine who lost property during the war?

Numbers that are statistically significantly higher / lower for a group, compared to the sample as a whole

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES
with regard to aiding citizens of Ukraine who lost property during the war
by age



Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

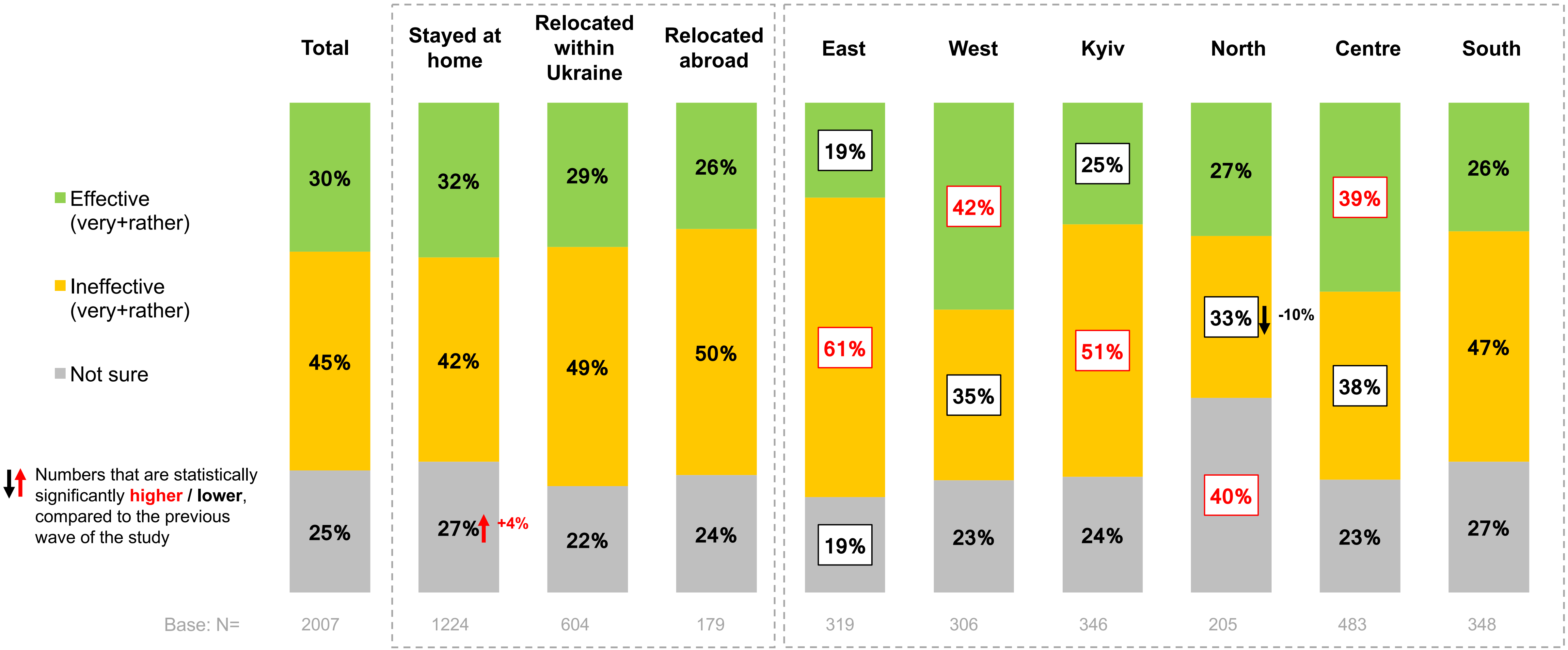
Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

Base: all respondents
How effective do you consider the actions of the Ukrainian authorities with regard to aiding citizens of Ukraine who lost property during the war?

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

with regard to aiding citizens of Ukraine who lost their income during the war

by migration status and region



Base: all respondents

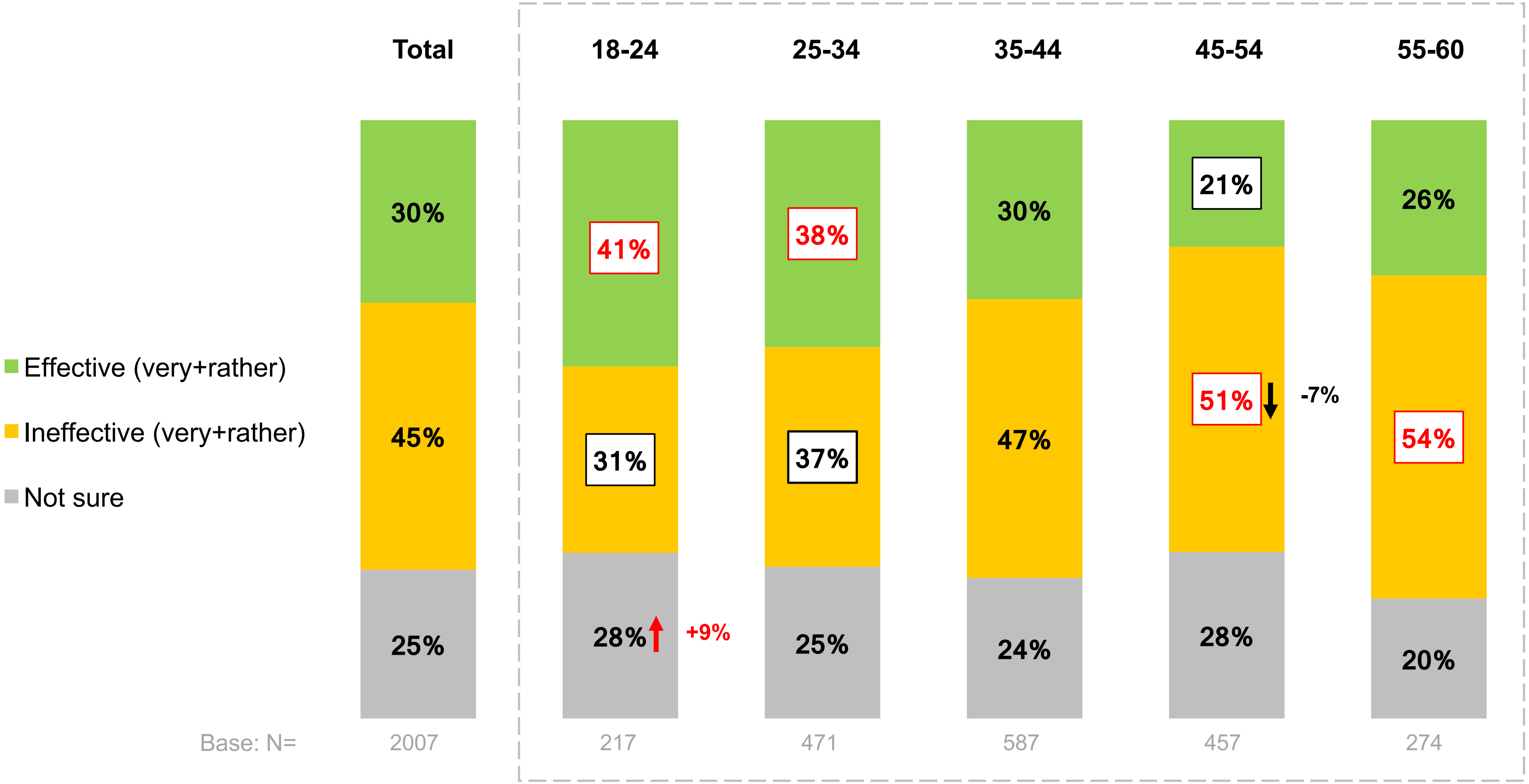
How effective do you consider the actions of the Ukrainian authorities with regard to aiding citizens of Ukraine who lost their job and income during the war?

Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

with regard to aiding citizens of Ukraine who lost their income during the war

by age



Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

Base: all respondents

How effective do you consider the actions of the Ukrainian authorities with regard to aiding citizens of Ukraine who lost their job and income during the war?

TRUST IN INSTITUTIONS

V wave

Most of all, Ukrainians* trust the Armed Forces of Ukraine (57%), the President (41%), and volunteer organizations (32%).

*Ukrainians - residents of cities with the population 50,000+ aged 18-60 who use smartphones
** The alternative was added in the fifth wave
Base: all respondents, N=2007
Which of the following institutions do you trust?

TRUST IN INSTITUTIONS

by migration status

Emigrants express relatively greater trust in scientists and professors (9% vs 5%). No other significant differences in trust in institutions depending on migration status were found.

	Total	Stayed at home	Relocated within Ukraine	Relocated abroad
Armed Forces of Ukraine	57%	60%	53%	56%
President of Ukraine	41%	40%	43%	40%
Volunteer organizations	32%	30%	34%	35%
Charitable organizations	18%	16%	22%	20%
Doctors	18%	17%	20%	21%
National Police of Ukraine	13%	14%	13%	8%
Government of Ukraine	11%	11%	12%	13%
Church	10%	10%	10%	9%
Public organizations	8%	8%	10%	9%
Verkhovna Rada of Ukraine	6%	6%	6%	6%
Local government	6%	7%	5%	7%
Teachers	5%	6%	5%	7%
Scientists and professors	5%	5%	5%	9%
National Bank of Ukraine	4%	5%	4%	3%
Ministry of Finance of Ukraine	3%	3%	3%	2%
Business	3%	3%	4%	5%
State Customs Service of Ukraine	2%	2%	1%	3%
Courts	1%	2%	1%	1%
State Tax Service	1%	1%	1%	3%
None of the above	8%	8%	8%	8%
Base: N=	2007	1224	604	179

Base: all respondents

Which of the following institutions do you trust?

Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

TRUST IN INSTITUTIONS

by age

Respondents aged 18 to 24 and 55 to 60 trust a large number of institutions significantly more than other age groups, but the list of these institutions varies somewhat: if older people tend to trust the Armed Forces of Ukraine, the President, volunteer and charitable organizations, and local government more, then young people trust teachers and scientists, the NBU, business, courts, customs and tax services more. However, there are common features: there is a higher share of those who trust doctors, the police, the government, the VRU, and the Ministry of Finance among both groups.

	Total	18-24	25-34	35-44	45-54	55-60
Armed Forces of Ukraine	57%	49%	54%	55%	57%	74%
President of Ukraine	41%	45%	43%	37%	35%	51%
Volunteer organizations	32%	30%	28%	27%	34%	46%
Charitable organizations	18%	23%	19%	14%	17%	25%
Doctors	18%	28%	18%	12%	16%	28%
National Police of Ukraine	13%	21%	12%	9%	13%	18%
Government of Ukraine	11%	17%	13%	7%	10%	16%
Church	10%	9%	10%	8%	11%	10%
Public organizations	8%	11%	10%	6%	7%	11%
Verkhovna Rada of Ukraine	6%	14%	6%	3%	5%	9%
Local government	6%	9%	4%	5%	6%	11%
Teachers	5%	16%	4%	4%	4%	5%
Scientists and professors	5%	14%	5%	4%	6%	3%
National Bank of Ukraine	4%	10%	5%	4%	2%	3%
Ministry of Finance of Ukraine	3%	10%	3%	2%	1%	7%
Business	3%	8%	3%		3%	1%
State Customs Service of Ukraine	2%	9%	2%	0,5%	2%	0,4%
Courts	1%	5%	1%	1%	1%	1%
State Tax Service	1%	4%	1%	1%	1%	
None of the above	8%	4%	10%	8%	7%	7%
Base: N=	2007	217	471	587	457	274

Base: all respondents

Which of the following institutions do you trust?

Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

TRUST IN INSTITUTIONS

by region

Residents from the Eastern region significantly less often declare trust in the Armed Forces of Ukraine than residents of other regions, while residents of the Central and Western regions, on the contrary, do so significantly more often; the latter group also trust the church more. Residents of the Southern region demonstrate a higher level of trust in volunteer and charitable organizations, while Kyiv residents do the same with regard to scientists and teachers, as well as the NBU.

	Total	East	West	Kyiv	North	Centre	South
Armed Forces of Ukraine	57%	40%	66%	57%	61%	63%	57%
President of Ukraine	41%	37%	39%	36%	46%	44%	44%
Volunteer organizations	32%	36%	30%	32%	30%	27%	37%
Charitable organizations	18%	17%	18%	20%	16%	15%	23%
Doctors	18%	15%	19%	22%	21%	17%	16%
National Police of Ukraine	13%	12%	10%	16%	7%	15%	16%
Government of Ukraine	11%	9%	11%	12%	7%	12%	15%
Church	10%	10%	17%	11%	6%	7%	7%
Public organizations	8%	8%	9%	9%	6%	8%	10%
Verkhovna Rada of Ukraine	6%	6%	7%	7%	4%	5%	7%
Local government	6%	6%	6%	7%	5%	7%	5%
Teachers	5%	8%	5%	5%	4%	5%	6%
Scientists and professors	5%	5%	5%	9%	5%	5%	4%
National Bank of Ukraine	4%	3%	3%	8%	3%	2%	4%
Ministry of Finance of Ukraine	3%	4%	1%	5%	2%	4%	3%
Business	3%	4%		5%	1%	2%	3%
State Customs Service of Ukraine	2%	3%	0,4%	4%	1%	2%	1%
Courts	1%	2%	0,3%	2%	0%	1%	3%
State Tax Service	1%	2%	1%	2%	1%	1%	1%
None of the above	8%	10%	7%	9%	7%	6%	8%
Base: N=	2007	319	306	346	205	483	348

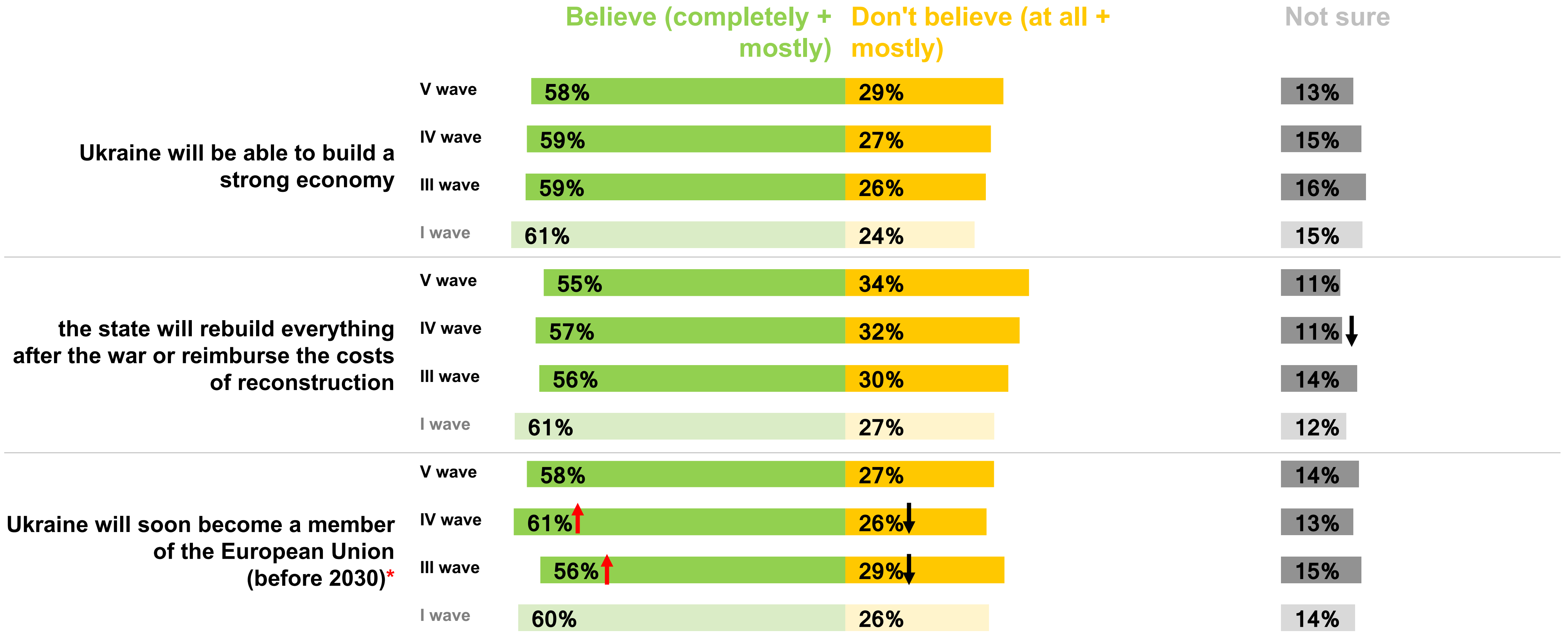
Base: all respondents

Which of the following institutions do you trust?

Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

UKRAINIANS'* BELIEF THAT…

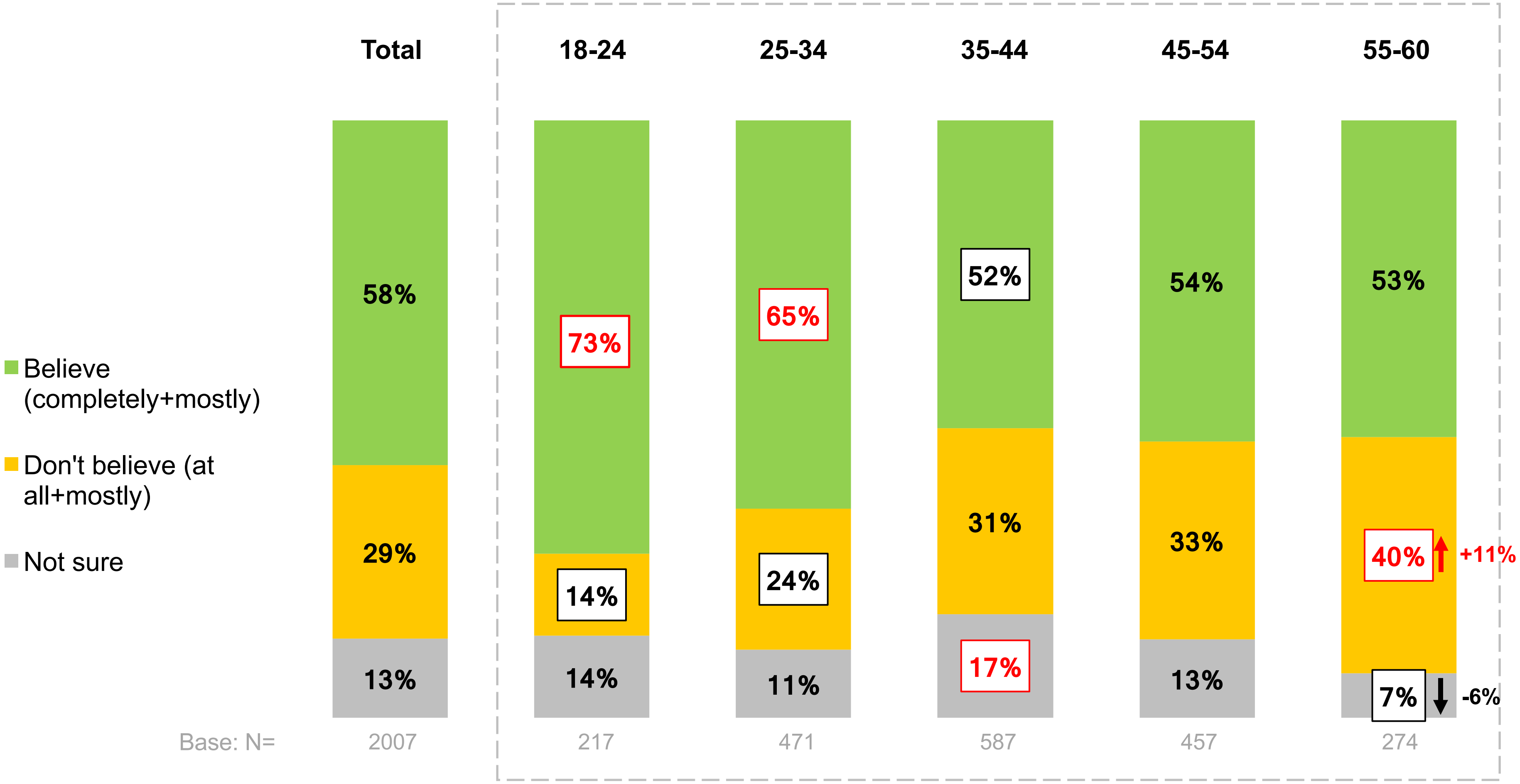
In the fifth wave, there were no changes in the level of respondents' belief in Ukraine's ability to build a strong economy, rebuild what was destroyed when the war ends, and become a member of the EU in near future: more than half of the respondents believe that it is possible.



*Ukrainians - residents of cities with the population 50,000+ aged 18 to 60 who use smartphones.
* The year specification was added in the current wave of the study
Base: all respondents; I wave - N = 2083, III wave - N = 2008, IV wave – N = 2012, V wave – N = 2007
Do you believe that : Ukraine will be able to build a strong economy / the state will rebuild everything after the war or reimburse the costs of reconstruction / Ukraine will soon become a member of the European Union?

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

UKRAINIANS'* BELIEF THAT…
Ukraine will be able to build a strong economy
by age



*Ukrainians - residents of cities with the population 50,000+ aged 18-60 who use smartphones.

Base: all respondents;
Do you believe that Ukraine will be able to build a strong economy?

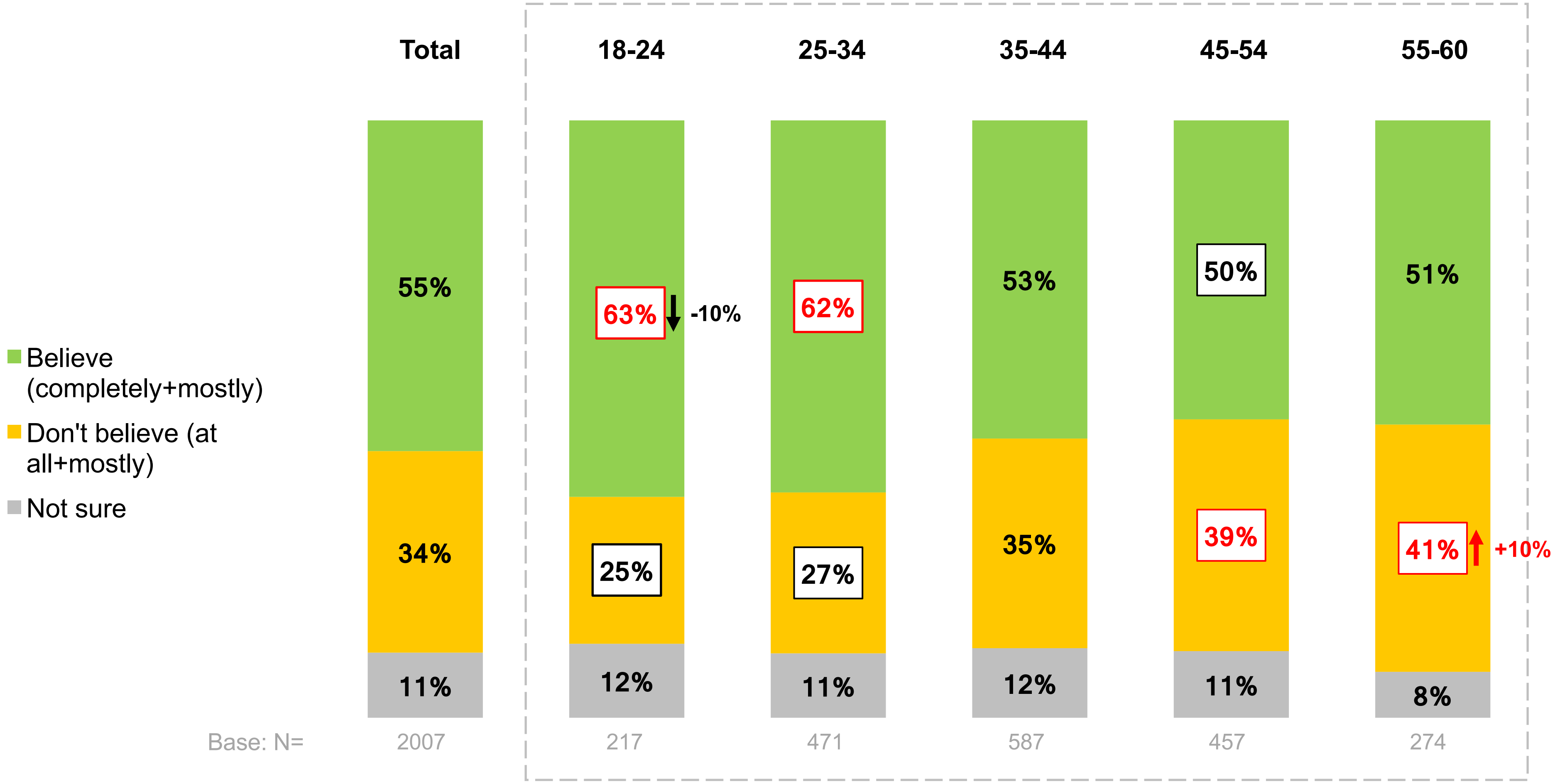
Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

UKRAINIANS'* BELIEF THAT…

the state will rebuild everything after the war / reimburse the costs

by age



*Ukrainians - residents of cities with the population 50,000+ aged 18-60 who use smartphones.

Base: all respondents;
Do you believe that the state will rebuild everything after the war or reimburse the costs of reconstruction?

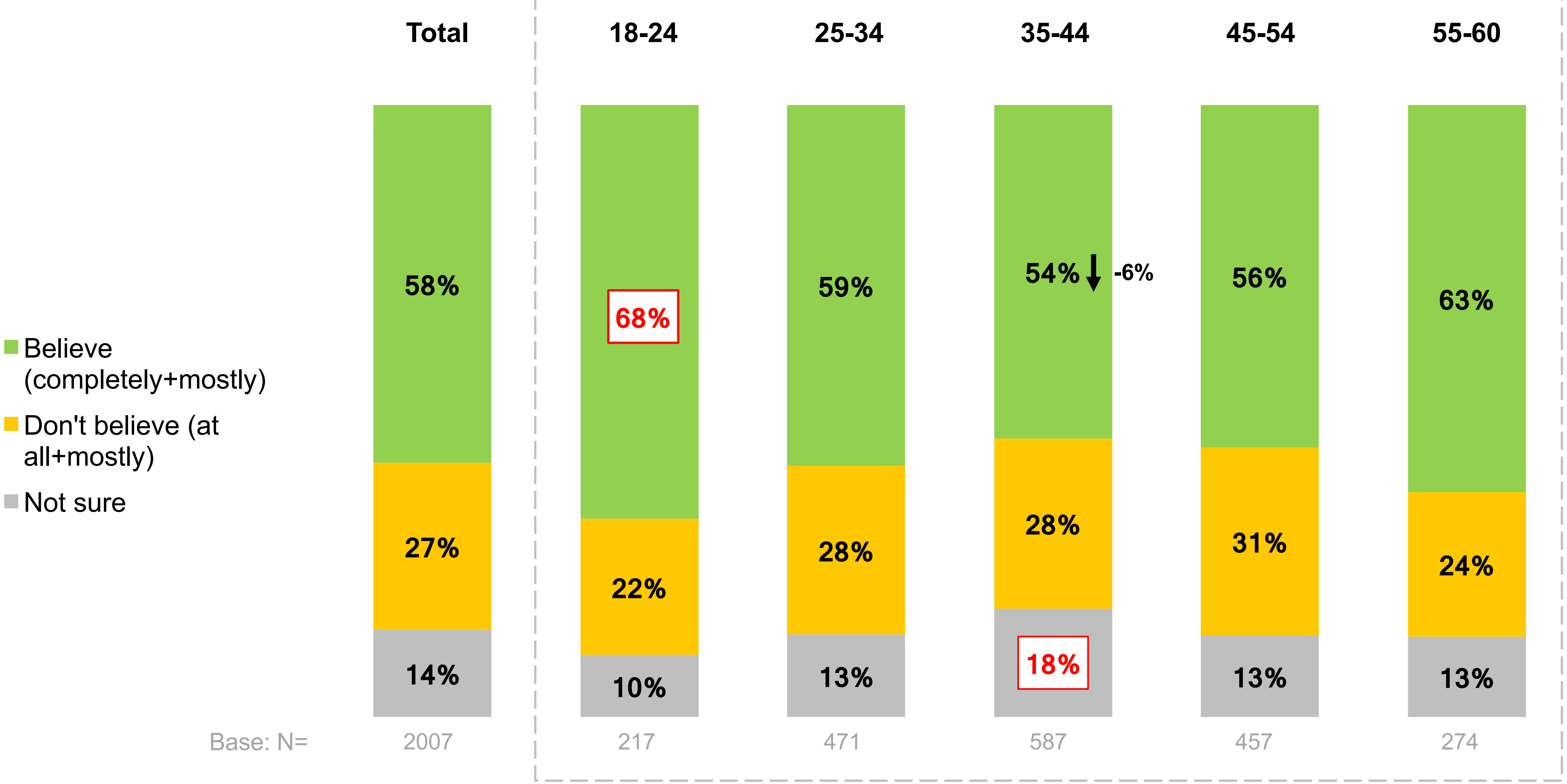
Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

UKRAINIANS'* BELIEF THAT…

Ukraine will soon become a member of the European Union (before 2030)*

by age



* Ukrainians - residents of cities with the population 50,000+ aged 18-60 who use smartphones

*The year specification was added in the current wave of the study

Base: all respondents

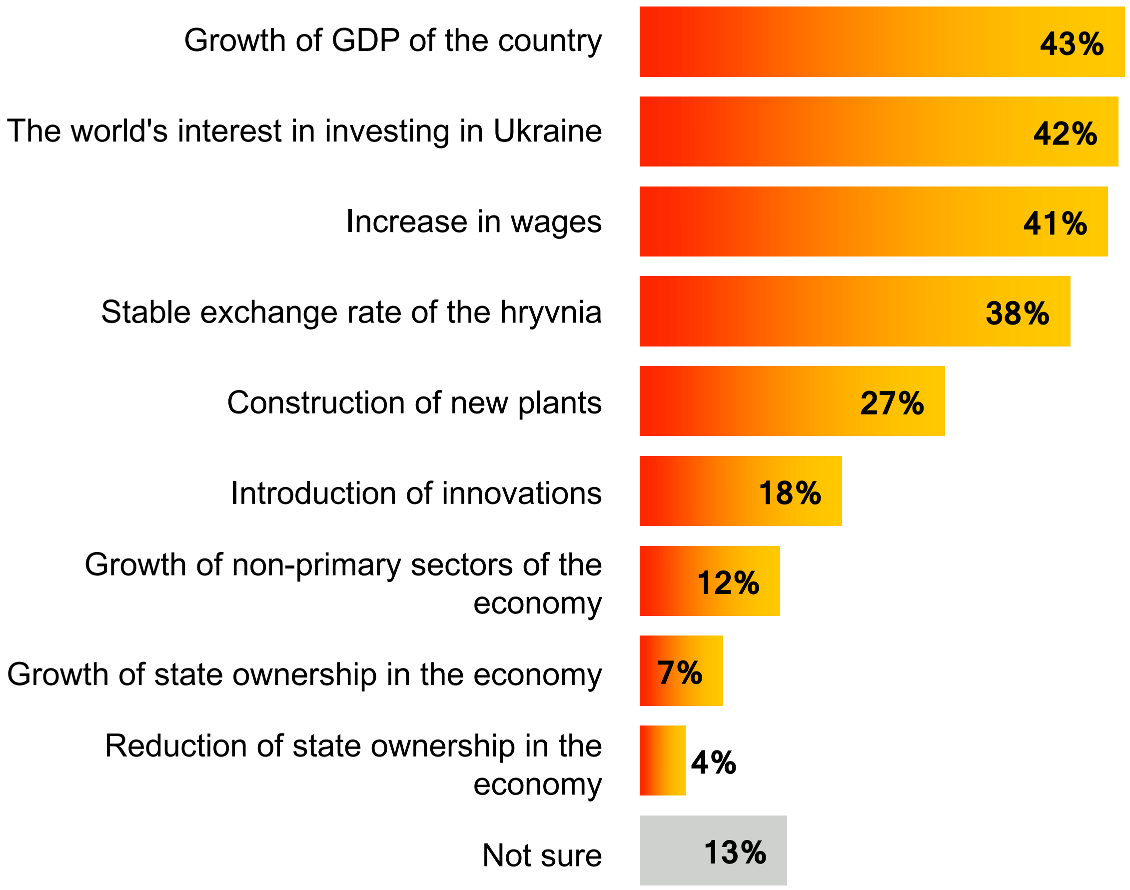
Do you believe that Ukraine will soon become a member of the European Union?

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

SIGNS OF A STRONG ECONOMY

Respondents most often consider growth of GDP of the country (43%), the world's interest in investing in Ukraine (42%), increase in wages (41%), as well as the stable exchange rate of the hryvnia (38%) to be signs of a strong economy.



Base: all respondents, N=2007
In your opinion, what is a sign of a strong economy?

SIGNS OF A STRONG ECONOMY

by gender and age

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Women more often than men note that the signs of a strong economy are increasing wages and a stable exchange rate of the hryvnia, but they less often pick growth of the country's GDP, introduction of innovations, growth of non-primary sectors of the economy, and reduction of state ownership in the economy. Respondents from the youngest age group (18-24) less often than the sample as a whole choose growth of the country's GDP and interest in investments in Ukraine, while representatives of the oldest group (55 to 60), on the contrary, choose these options more often than others.

	Total	Men's	Woman`s	18-24	25-34	35-44	45-54	55-60
Growth of GDP of the country	43%	48%	38%	33%	41%	41%	44%	54%
The world's interest in investing in Ukraine	42%	41%	43%	34%	41%	43%	42%	49%
Increase in wages	41%	38%	44%	41%	40%	42%	40%	45%
Stable exchange rate of the hryvnia	38%	33%	42%	36%	38%	34%	37%	49%
Construction of new plants	27%	26%	28%	19%	28%	27%	27%	29%
Introduction of innovations	18%	20%	16%	14%	18%	20%	14%	22%
Growth of non-primary sectors of the economy	12%	14%	11%	11%	13%	11%	14%	12%
Growth of state ownership in the economy	7%	8%	7%	5%	5%	8%	9%	8%
Reduction of state ownership in the economy	4%	5%	3%	7%	4%	4%	3%	4…
Not sure	13%	12%	14%	19%	16%	14%	11%	4%
Base: N=	2007	962	1045	217	471	587	457	274

Base: all respondents, N=2007

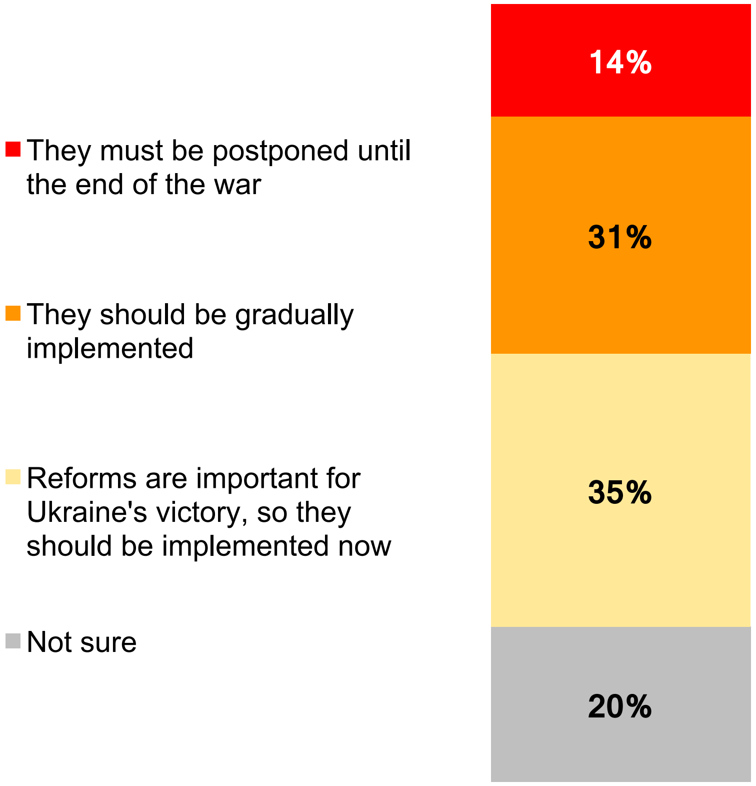
In your opinion, what is a sign of a strong economy?

Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

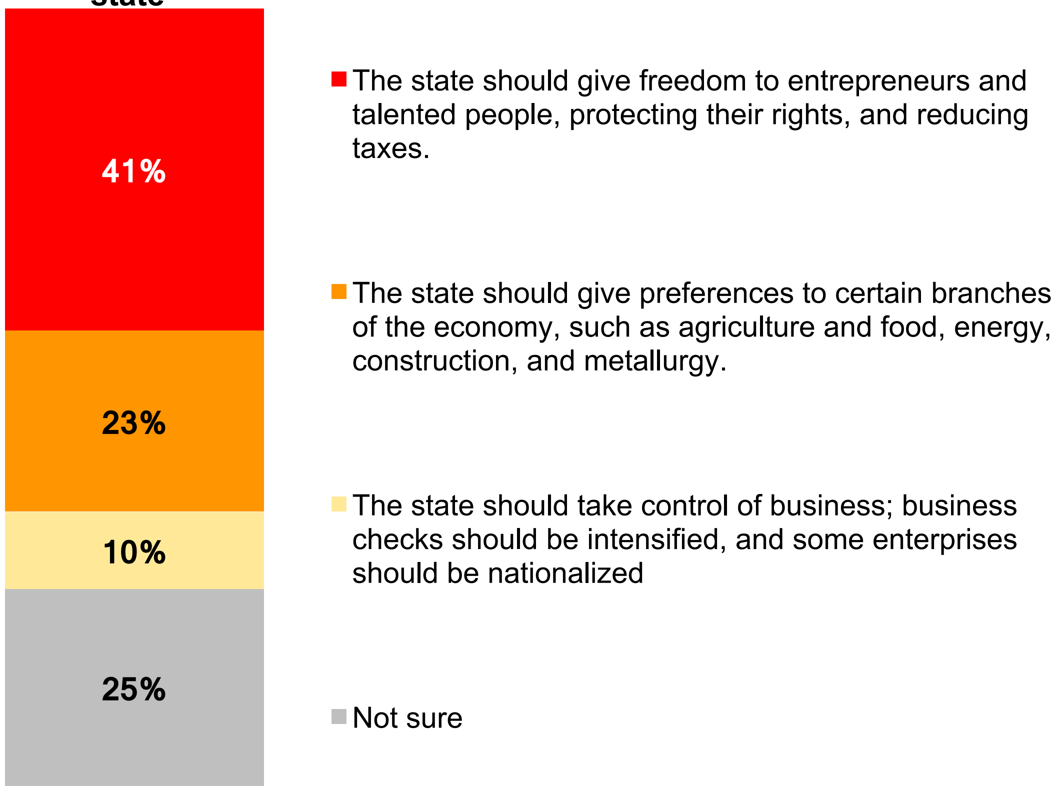
ATTITUDE TO IMPLEMENTATION OF REFORMS AND NECESSARY ECONOMIC REFORMS

About a third of the respondents consider that reforms in Ukraine should be implemented now; another third note that they should be implemented gradually. The largest share of respondents (41%) declare that the leadership of the Ukrainian state needs to prioritize reforms to deregulate the economy.

Attitude to implementation of reforms in Ukraine



Which economic reforms should be chosen by leadership of the Ukrainian state



Base: all respondents, N=2007
How do you feel about the idea of implementing reforms in Ukraine?
In your opinion, which of the following options for economic reforms should the leadership of the Ukrainian state choose?

ATTITUDE TO IMPLEMENTATION OF REFORMS AND NECESSARY ECONOMIC REFORMS

by gender and age

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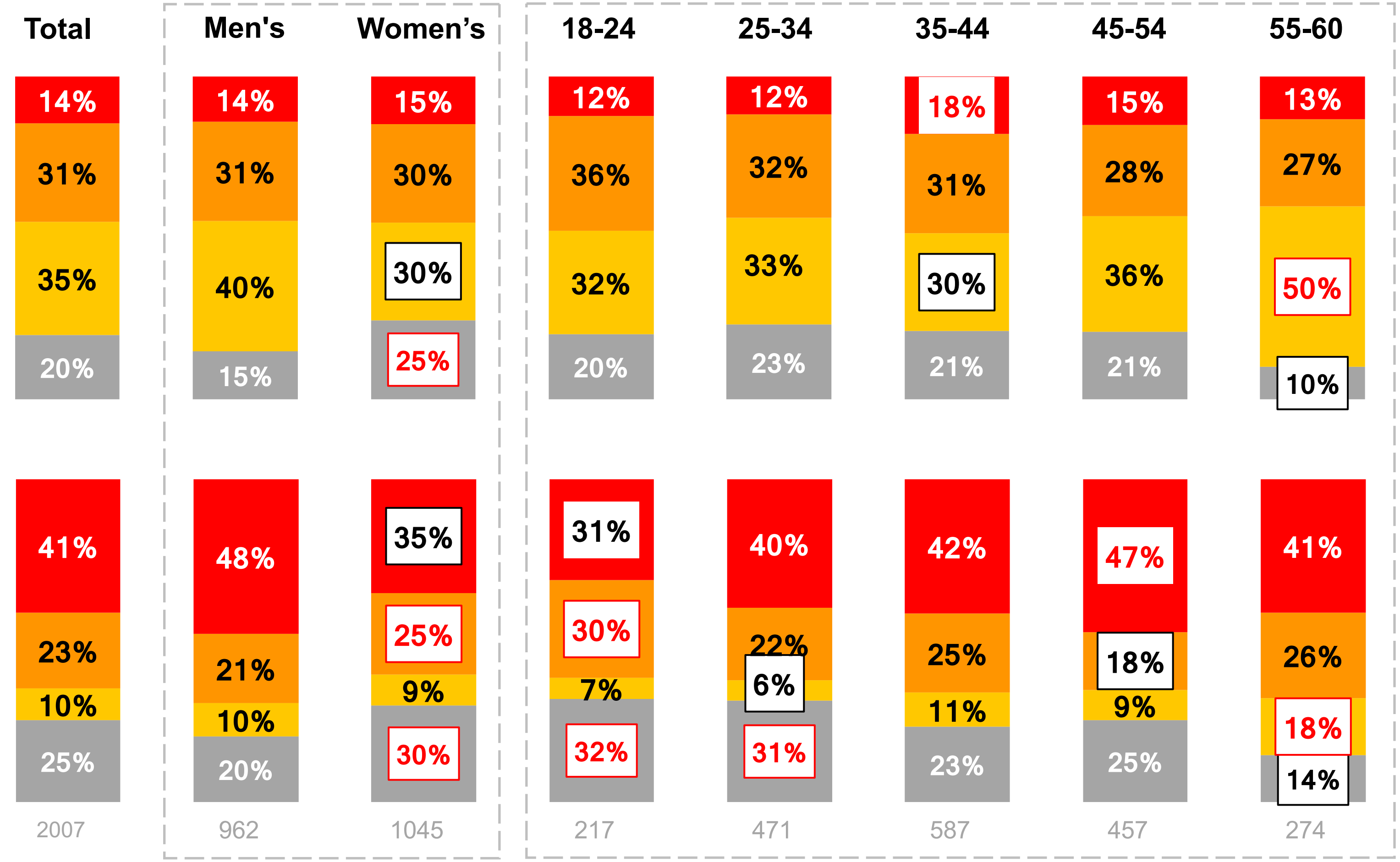
Women less often support market deregulation, more often hesitate with answer and are less likely than men to consider that reforms in Ukraine should be implemented now. Respondents aged 18 to 24 are less likely to support market deregulation and more often support giving preference to certain sectors of the economy. Respondents aged 25 to 34 less often support government regulation of business. Respondents aged 35 to 44 more often note that reforms should be postponed until the end of the war. Respondents aged 45 to 54 more often support business deregulation. Respondents aged 55 to 60 more often support the implementation of reforms now, are less likely to support state regulation of business and less often hesitate to answer.

Attitude to implementation of reforms in Ukraine

- They must be postponed until the end of the war
- They should be gradually implemented
- Reforms are important for Ukraine's victory, so they should be implemented now
- Not sure

Which economic reforms should be chosen by leadership of the Ukrainian state

- The state should give freedom to entrepreneurs and talented people, protecting their rights, and reducing taxes
- The state should give preferences to certain branches of the economy, such as agriculture and food, energy, construction, and metallurgy
- The state should take control of business; business checks should be intensified, and some enterprises should be nationalized
- Not sure



Base: all respondents, N=2007
How do you feel about the idea of implementing reforms in Ukraine?
In your opinion, which of the following options for economic reforms should the leadership of the Ukrainian state choose?

Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

ATTITUDE TO IMPLEMENTATION OF REFORMS AND NECESSARY ECONOMIC REFORMS

by region

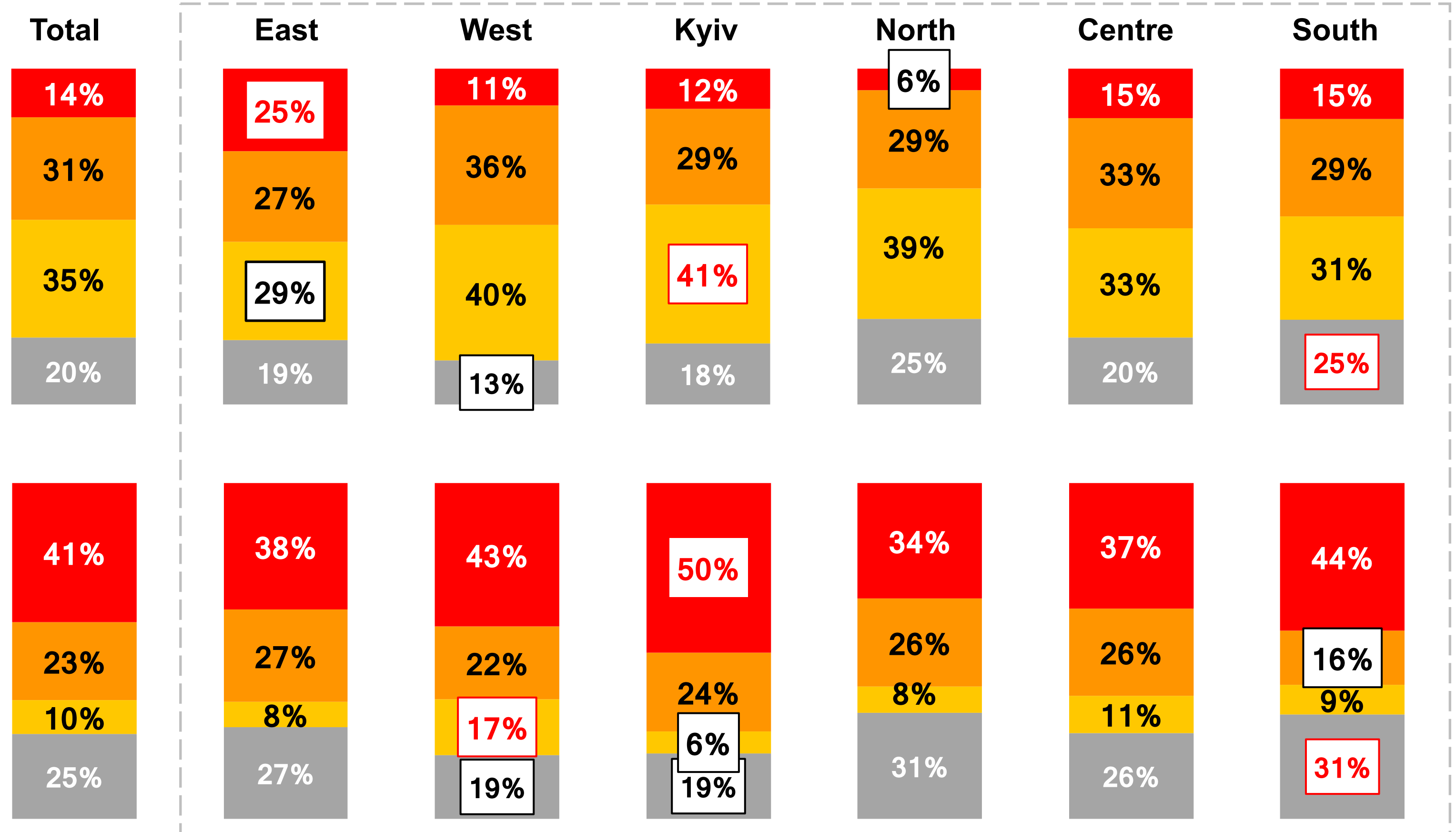
Respondents from the Eastern region consider that reforms should be postponed until the end of the war more often than others. Respondents from the Western region more often support state control over the economy and they are less hesitant to answer. Respondents from Kyiv more often support the deregulation of the economy and the implementation of reforms as soon as possible. Respondents from the Northern region are less likely to consider that reforms should be postponed until the end of the war. Respondents from the Southern region more often hesitate to answer.

Attitude to implementation of reforms in Ukraine

- They must be postponed until the end of the war
- They should be gradually implemented
- Reforms are important for Ukraine's victory, so they should be implemented now
- Not sure

Which economic reforms should be chosen by leadership of the Ukrainian state

- The state should give freedom to entrepreneurs and talented people, protecting their rights, and reducing taxes
- The state should give preferences to certain branches of the economy, such as agriculture and food, energy, construction, and metallurgy
- The state should take control of business; business checks should be intensified, and some enterprises should be nationalized
- Not sure



Base: N= 2007 319 306 346 205 483 348

Base: all respondents, N=2007

How do you feel about the idea of implementing reforms in Ukraine?

In your opinion, which of the following options for economic reforms should the leadership of the Ukrainian state choose?

Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

LATEST NEWS: KNOWLEDGE AND PERCEPTION

MOST IMPORTANT NEWS OF THE LAST WEEK

spontaneous answers

The important news that was mentioned spontaneously by the respondents most often is missile shelling of Vinnytsia (28%), shelling of Ukrainian cities (excluding Vinnytsia), and news about the war in general (13%).

Base: all respondents, N=2007
Only the alternatives that have been mentioned in >2% of the cases have been shown on the slide.
What events of the last week would you consider to be the most important? (open-ended question)

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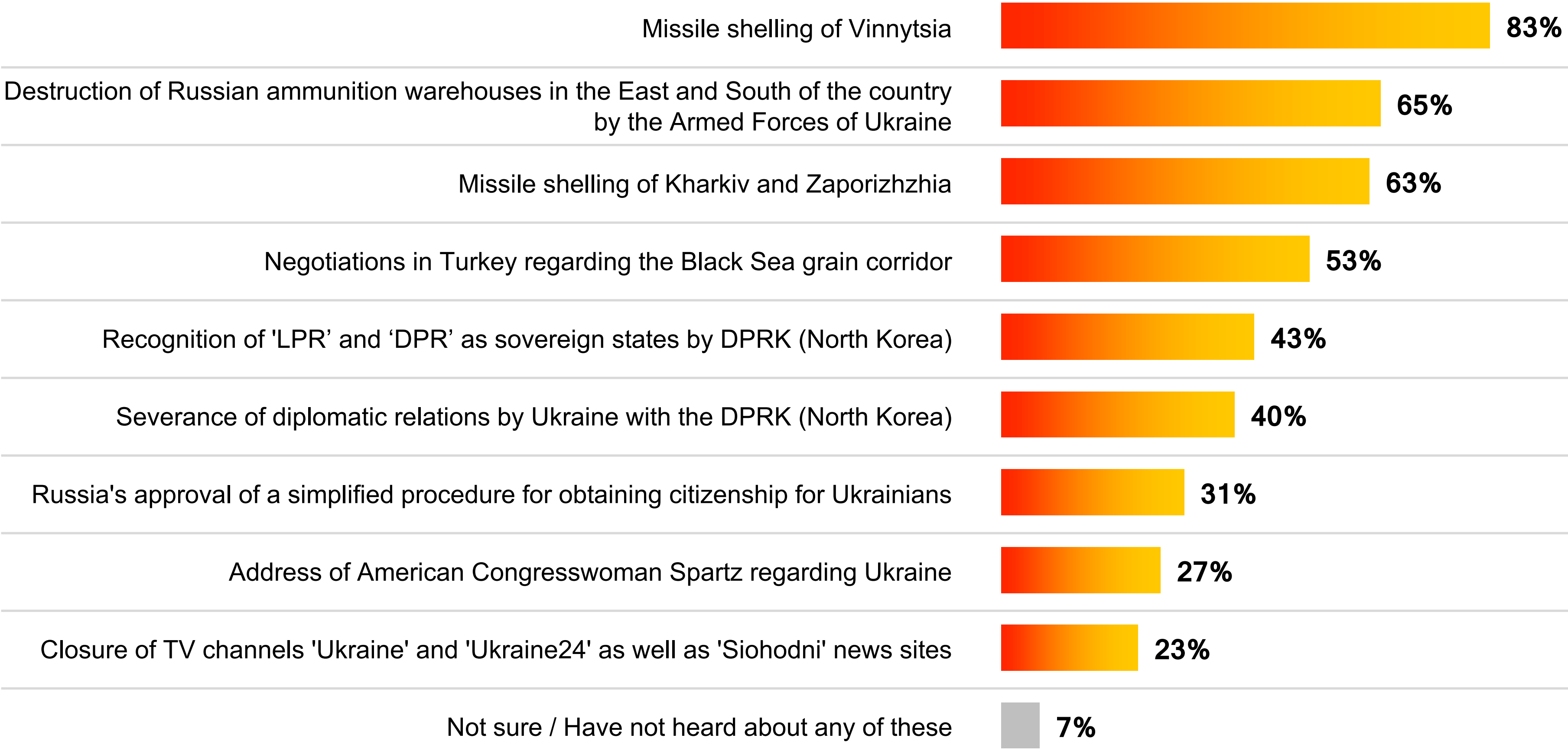
KNOWLEDGE OF THE EVENTS

The event that the largest share of the audience is aware of is the missile shelling of Vinnytsia (83%). 65% of respondents know about the destruction of Russian ammunition warehouses by the Armed Forces of Ukraine, while the news stories about the missile shelling of Kharkiv and Zaporizhzhia, and the negotiations in Turkey regarding the Black Sea grain corridor are known by 63% and 53%, respectively. Less than half of the respondents know about the rest of the events; the respondents are least aware of the closure of TV channels 'Ukraine' and 'Ukraine24' as well as 'Siohodni' news sites (23%).



Base: all respondents, N=2007

Which of the following events that occurred last week did you know / hear about?

KNOWLEDGE OF THE EVENTS

by region

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Respondents from the Southern region significantly more often heard about the destruction of Russian ammunition warehouses and missile shelling of Kharkiv and Zaporizhzhia, and significantly less often heard about the address of Congresswoman Spartz regarding Ukraine. Residents of Kyiv and the Northern region are significantly more aware of the closure of the "Ukraine" and "Ukraine24" channels, while residents of the Western region, on the contrary, are significantly less aware of it. Also, there is a greater share of those who know about the severance of diplomatic relations by Ukraine with North Korea among Kyiv residents.

	Total	East	West	Kyiv	North	Centre	South
Missile shelling of Vinnytsia	83%	80%	84%	85%	84%	85%	82%
Destruction of Russian ammunition warehouses in the East and South	65%	60%	61%	65%	64%	66%	71%
Missile shelling of Kharkiv and Zaporizhzhia	63%	65%	59%	63%	57%	61%	69%
Negotiations in Turkey regarding the Black Sea grain corridor	53%	47%	53%	55%	49%	54%	55%
Recognition of 'LPR' and 'DPR' as sovereign states by DPRK (North Korea)	43%	44%	45%	44%	42%	44%	40%
Severance of diplomatic relations by Ukraine with the DPRK (North Korea)	40%	37%	38%	46%	41%	40%	37%
Russia's approval of a simplified procedure for obtaining citizenship for Ukrainians	31%	34%	29%	35%	22%	31%	32%
Address of American Congresswoman Spartz regarding Ukraine	27%	23%	30%	31%	25%	31%	20%
Closure of TV channels 'Ukraine' and 'Ukraine24' as well as 'Siohodni' news sites	23%	25%	17%	30%	30%	20%	21%
Not sure / Have not heard about any of these	7%	7%	4%	6%	8%	8%	6%
Base: N=	2007	319	306	346	205	483	348

Base: all respondents

Which of the following events that occurred last week did you know / hear about?

Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

KNOWLEDGE OF THE EVENTS

by age

Respondents from the age group of 55-60 years are the most knowledgeable about all the events of the last week: the category of those who have not heard of any of the events is not represented among them at all. At the same time, respondents aged 18 to 24 know significantly less about all the events, except for the address of American Congresswoman Spartz; young people aged 18 to 34 significantly more often have noted that they had not heard of any of the news.

	Total	18-24	25-34	35-44	45-54	55-60
Missile shelling of Vinnytsia	83%	65%	80%	83%	88%	96%
Destruction of Russian ammunition warehouses in the East and South	65%	56%	61%	62%	66%	80%
Missile shelling of Kharkiv and Zaporizhzhia	63%	49%	57%	58%	70%	81%
Negotiations in Turkey regarding the Black Sea grain corridor	53%	38%	49%	51%	50%	77%
Recognition of 'LPR' as a sovereign state by DPRK (North Korea)	43%	33%	40%	40%	41%	65%
Severance of diplomatic relations by Ukraine with the DPRK (North Korea)	40%	32%	40%	36%	37%	59%
Russia's approval of a simplified procedure for obtaining citizenship for Ukrainians	31%	23%	30%	29%	32%	43%
Address of American Congresswoman Spartz regarding Ukraine	27%	25%	21%	24%	30%	41%
Closure of TV channels 'Ukraine' and 'Ukraine24' as well as 'Siohodni' news sites	23%	17%	22%	20%	23%	37%
Not sure / Have not heard about any of these	7%	12%	11%	7%	3%	
Base: N=	2007	217	471	587	457	274

Base: all respondents

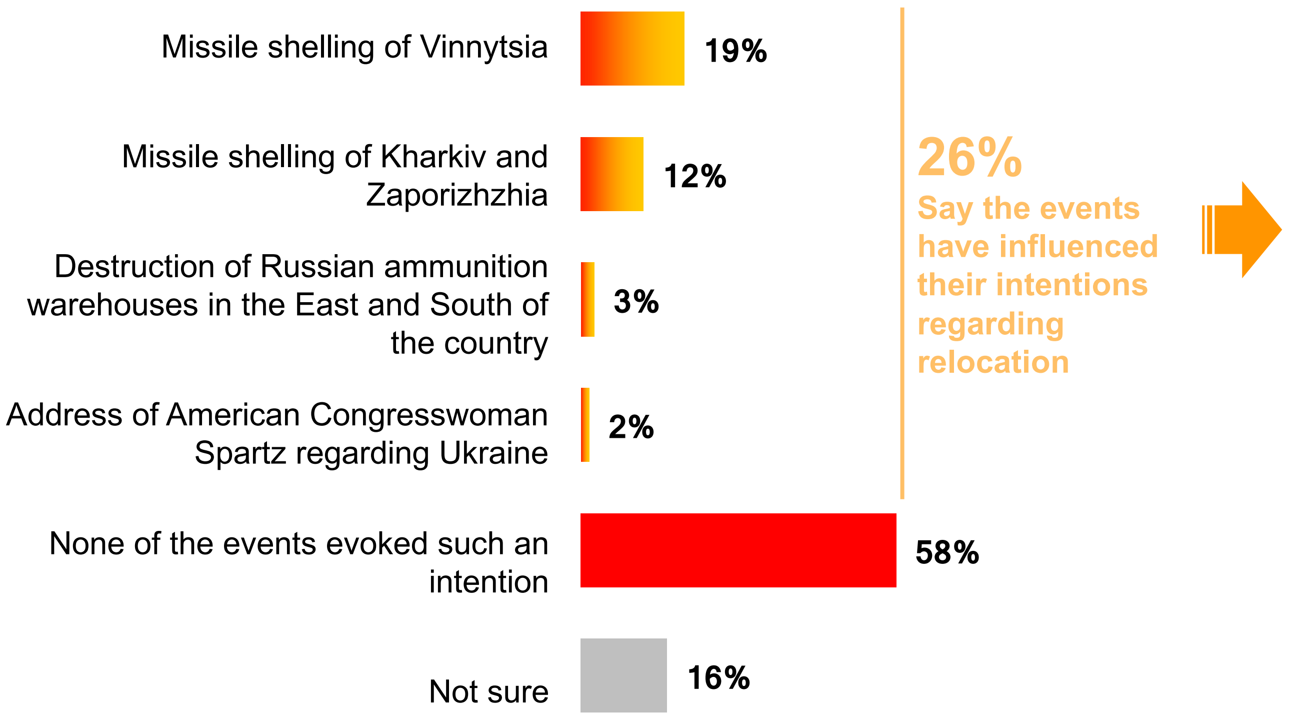
Which of the following events that occurred last week did you know / hear about?

Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

THE EFFECT OF THE AFOREMENTIONED EVENTS ON PLANS REGARDING RELOCATION

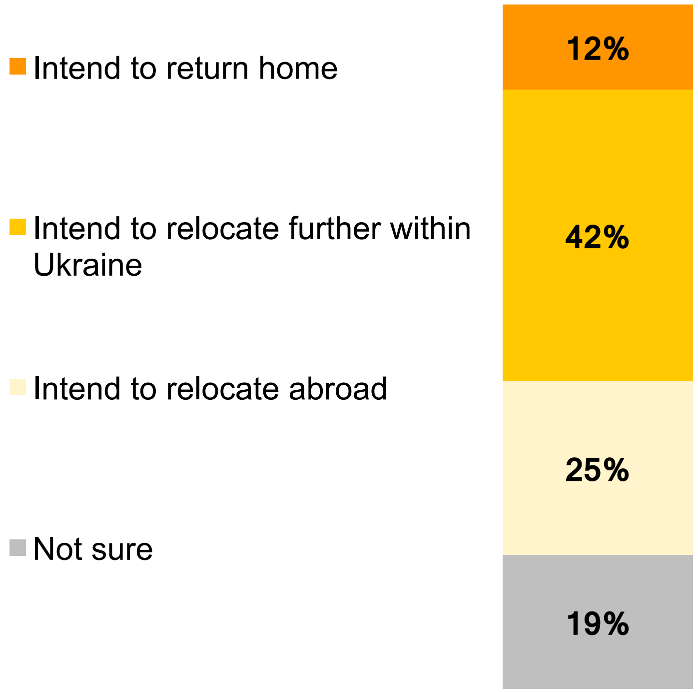
Most of the respondents (58%) did not have a desire to change their current place of residence because of the events they heard about. The missile shelling of Vinnytsia was most often called the news that caused this desire (19%); missile shelling of Kharkiv and Zaporizhzhia were also mentioned often (12%). The most common direction of relocation that the respondents plan to carry out with regard to the listed news is moving within Ukraine (42%); a quarter (25%) of respondents would like to relocate abroad.

The effect of the events on plans regarding relocation



Only those events that were selected ≥2% of the time are shown.
Base: those who stayed in Ukraine and have heard about the aforementioned events, N = 1876

Relocation specifics



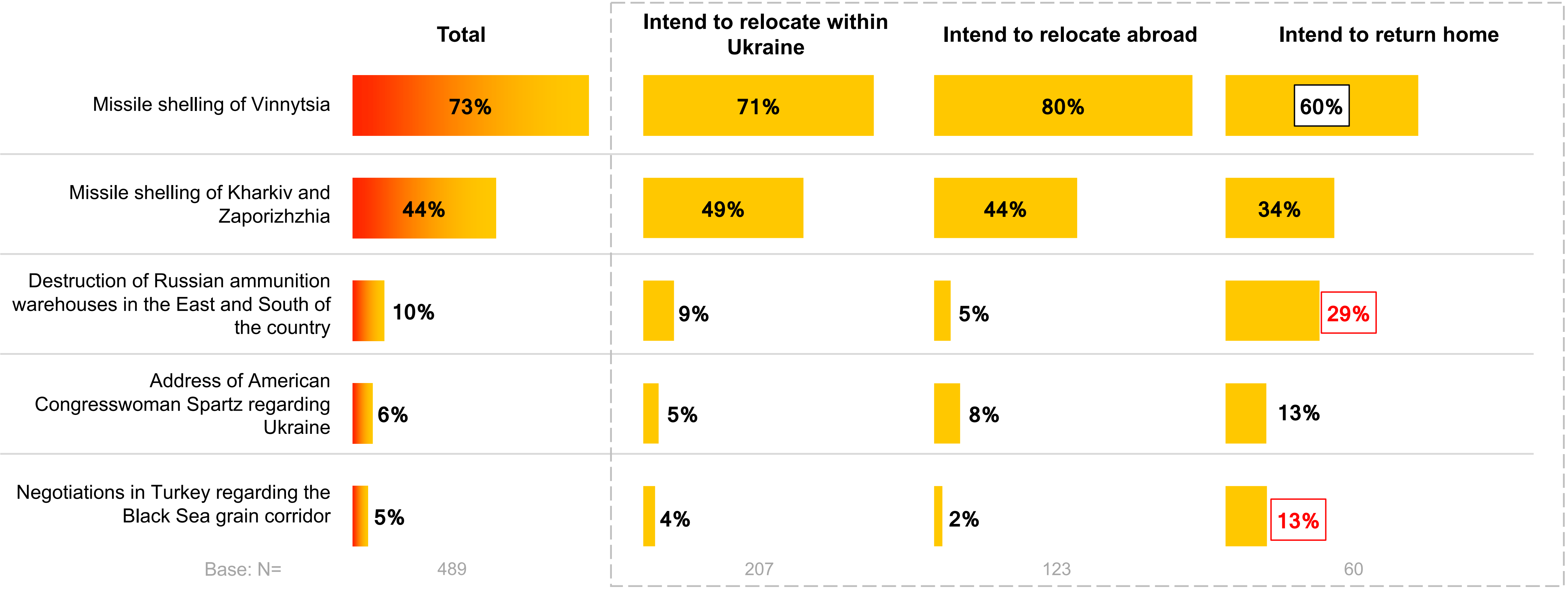
Base: respondents who want to relocate because of these events, N = 489

Which of these events made you intend to change your current location?
Where exactly do you intend to move?

NEWS THAT HAD EFFECT ON PLANS REGARDING RELOCATION

by the intention to relocate

Those respondents who intend to return to their permanent place of residence were significantly less influenced by the news about the missile shelling of Vinnytsia, and significantly more – by the news about the destruction of warehouses and negotiations in Turkey regarding the Black Sea grain corridor.



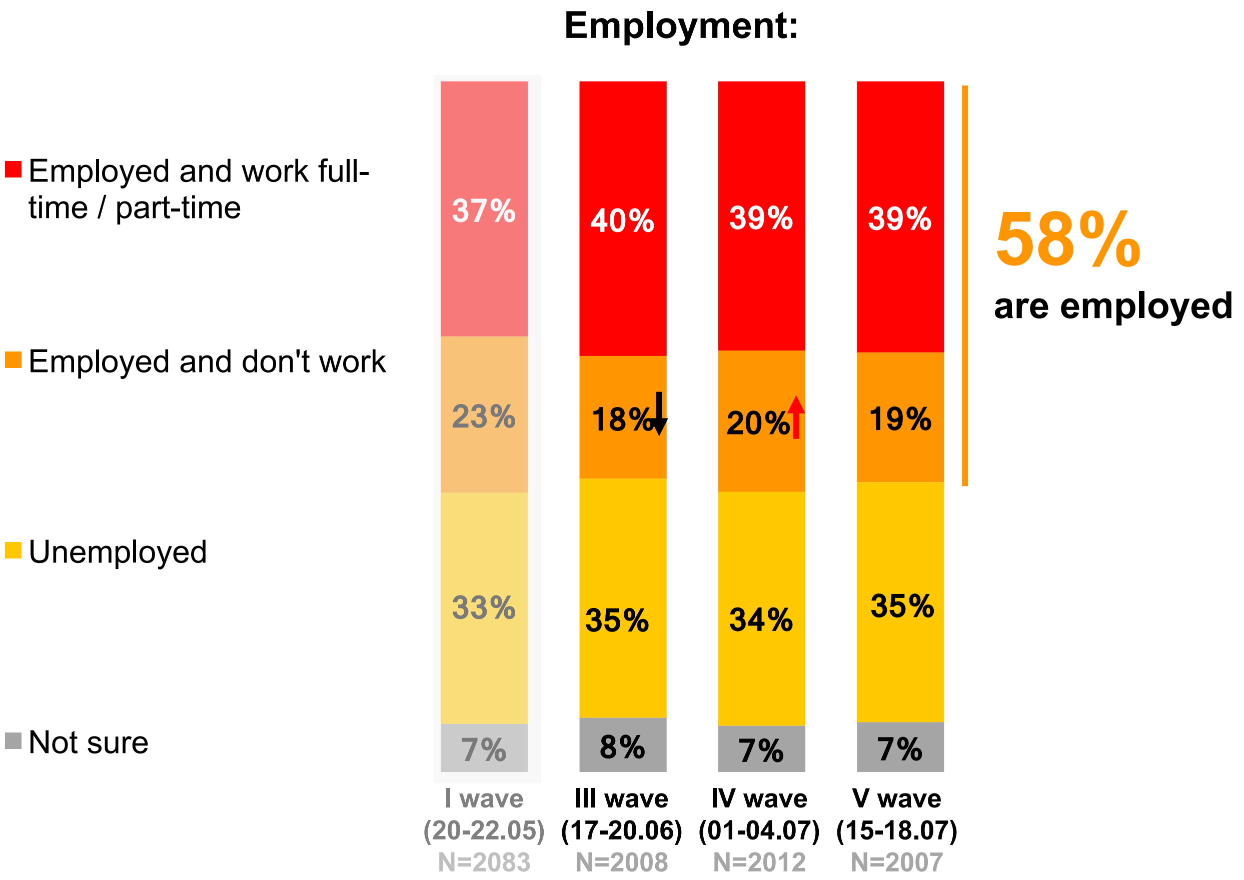
Only those events that received more than 4% of responses are shown on the slide
Base: respondents who want to relocate because of these events
Which of these events made you intend to change your current location?
Where exactly do you intend to move?

Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

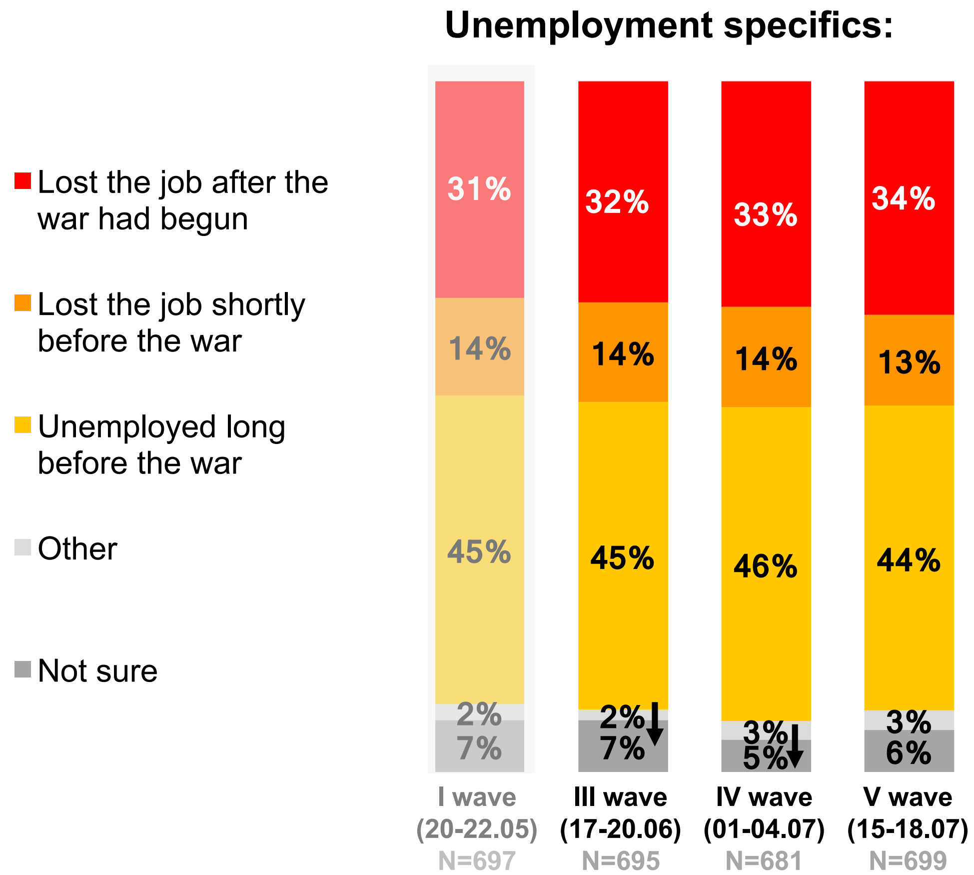
EMPLOYMENT DURING THE WAR

EMPLOYMENT DURING THE WAR

58% of Ukrainians* have a job; 39% of them work full-time or part-time, and the other 19% have a job, but are not currently working. A third (34%) of those unemployed lost their jobs after the war had begun.



Base: all respondents



Base: respondents who are unemployed now

*Ukrainians - residents of cities with the population 50,000+ aged 18-60 who use smartphones.
Are you currently employed?
Which of the following phrases best describes your situation:

Numbers that are statistically significantly higher / **lower**, compared to the previous wave of the study

EMPLOYMENT DURING THE WAR

by migration status and region

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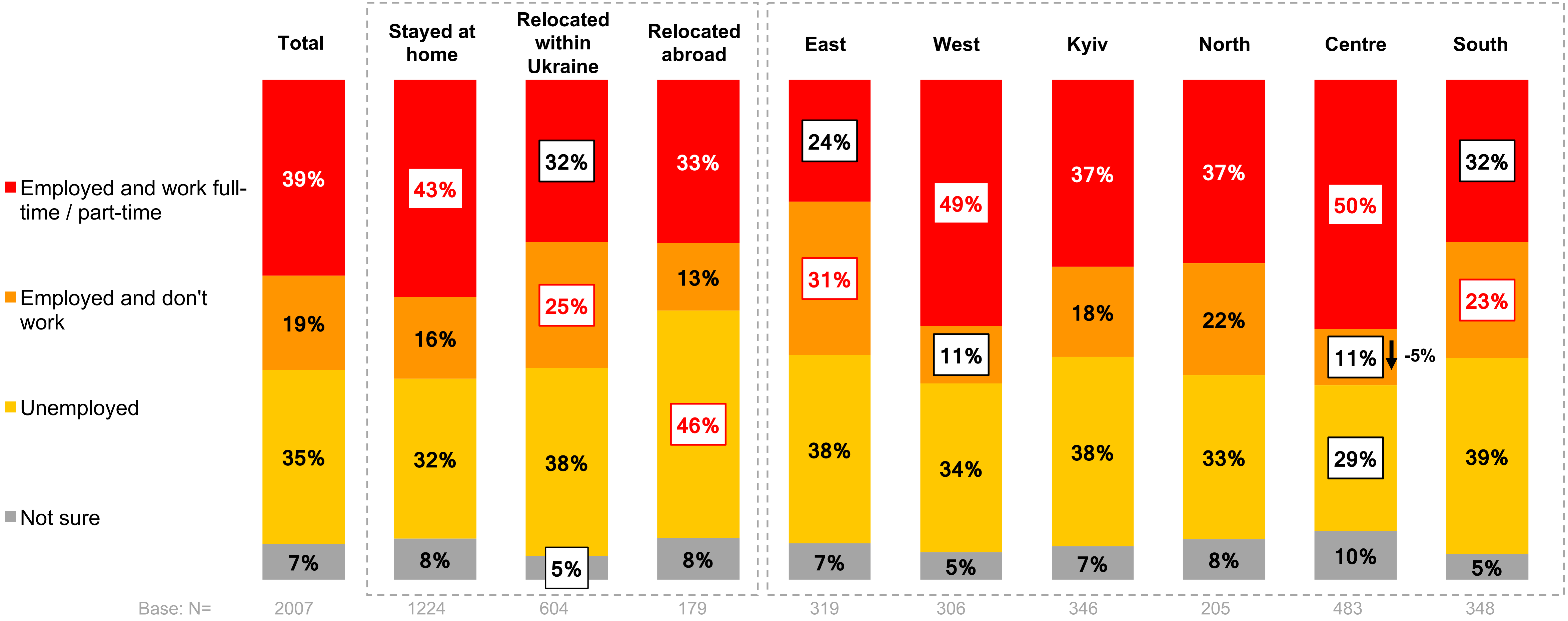
In the current wave, the trend persists: the largest share of those who have a job and are working is recorded among the residents of the Central and Western regions, as well as among those who stayed at home.



Base: all respondents
Are you currently employed?

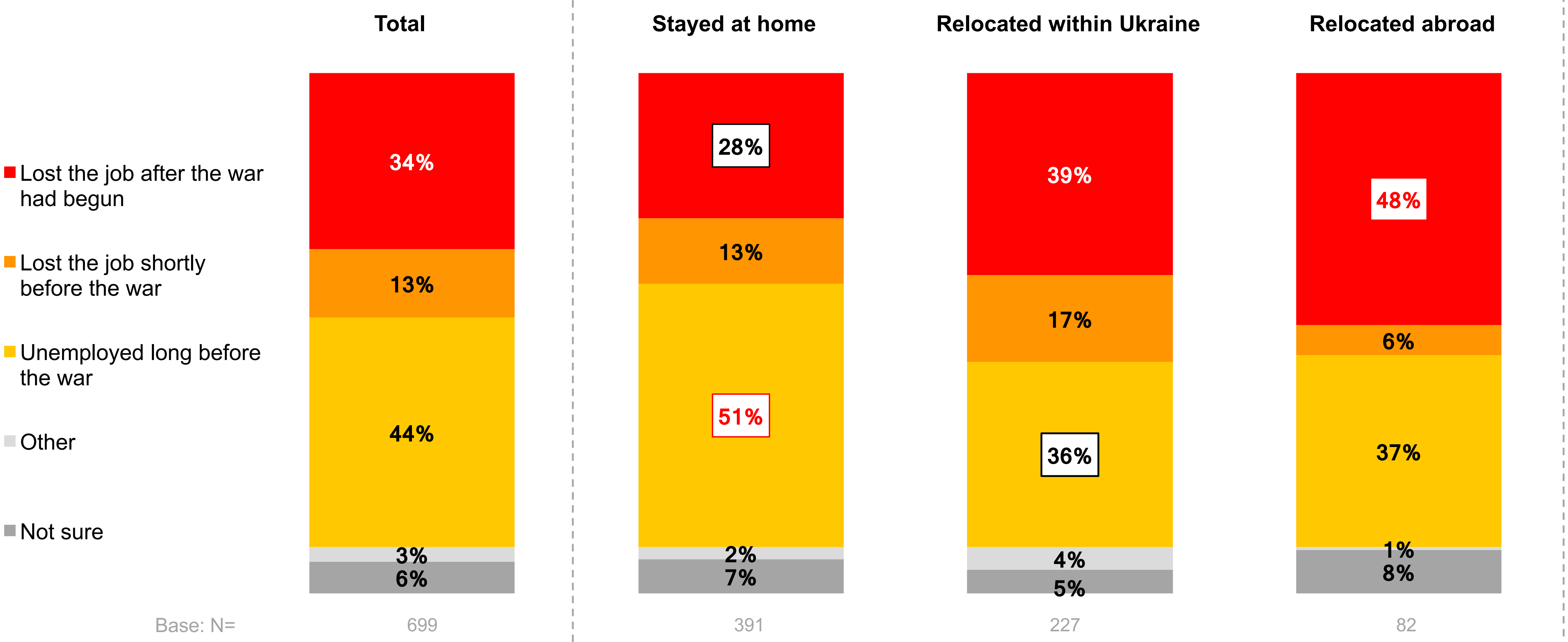
Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

UNEMPLOYMENT SPECIFICS

by migration status

Almost half of external migrants lost their jobs after the war had begun, and this percentage is significantly higher compared to the sample as a whole.



Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

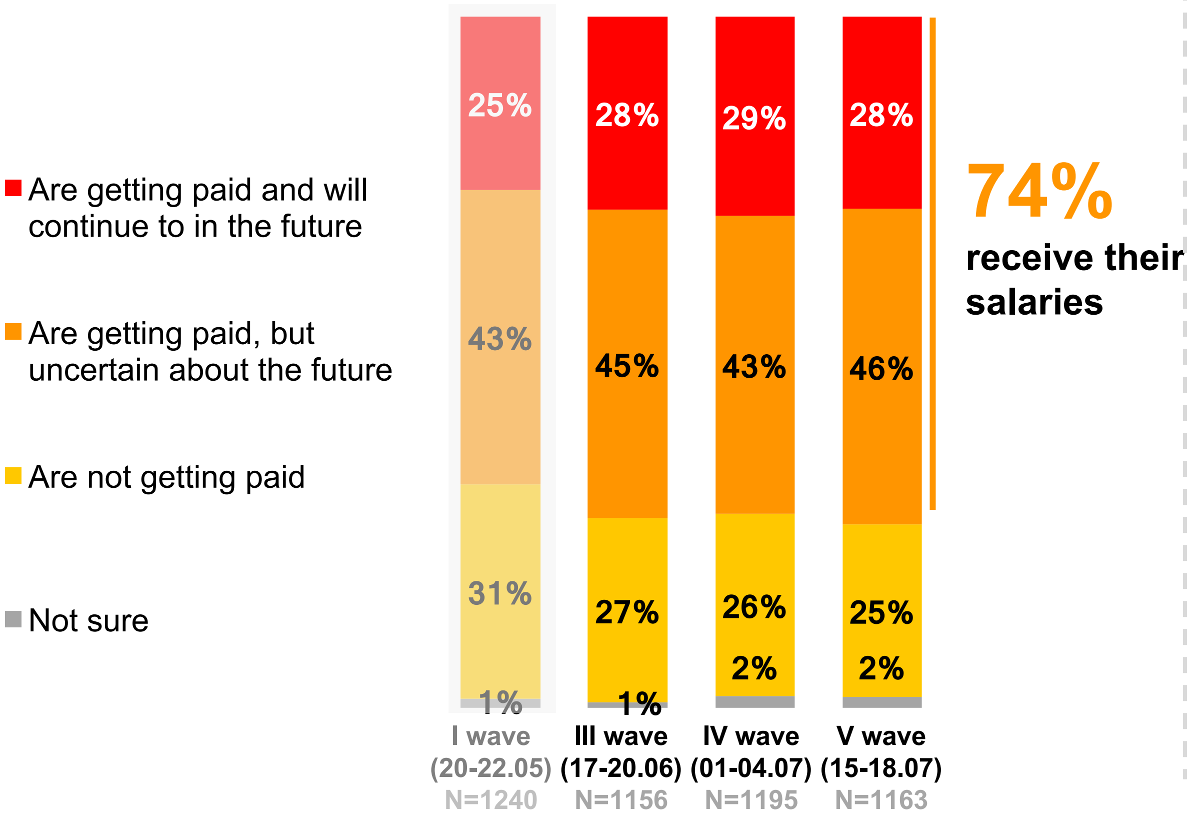
Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

Base: respondents who are unemployed now
Which of the following phrases best describes your situation:

INCOME DURING THE WAR

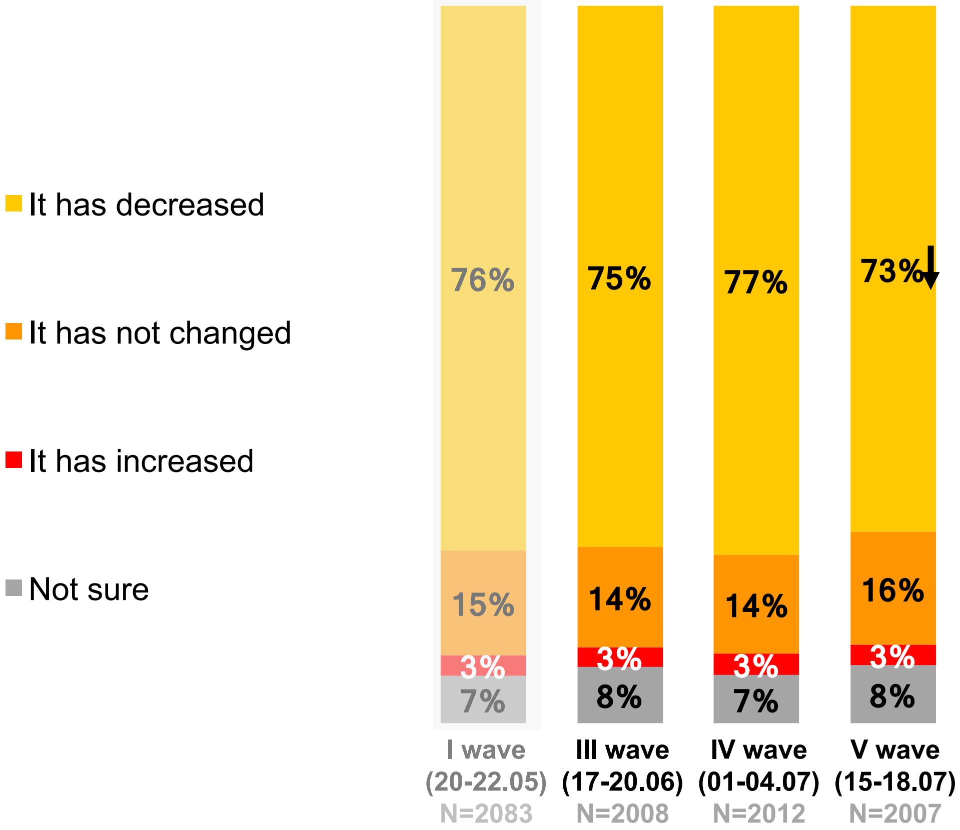
74% of employed people receive a salary, but a significant share of them are not confident that this will continue (46%). The vast majority of all respondents declare a decline in their income compared to the pre-war times (73%), but this number has decreased significantly since the fourth wave.

Income stability:



Base: respondents who are employed

Changes in income:



Base: all respondents

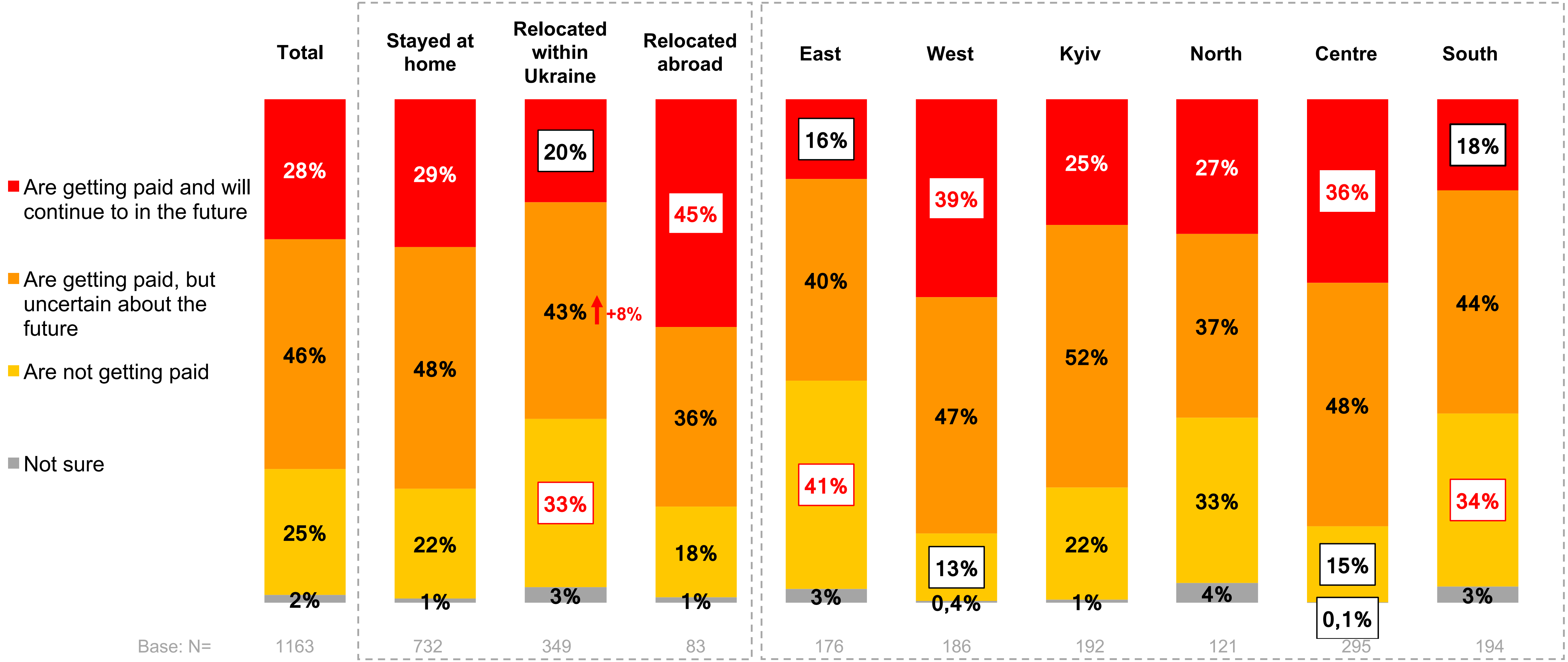
Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

Do you receive salary?
How has your income changed since the full-scale war had begun?

INCOME DURING THE WAR

by migration status and region

The significantly higher share of those who have confidence in receiving wages in the future is recorded among those who have relocated abroad, as well as among the residents of the Western and Central regions.



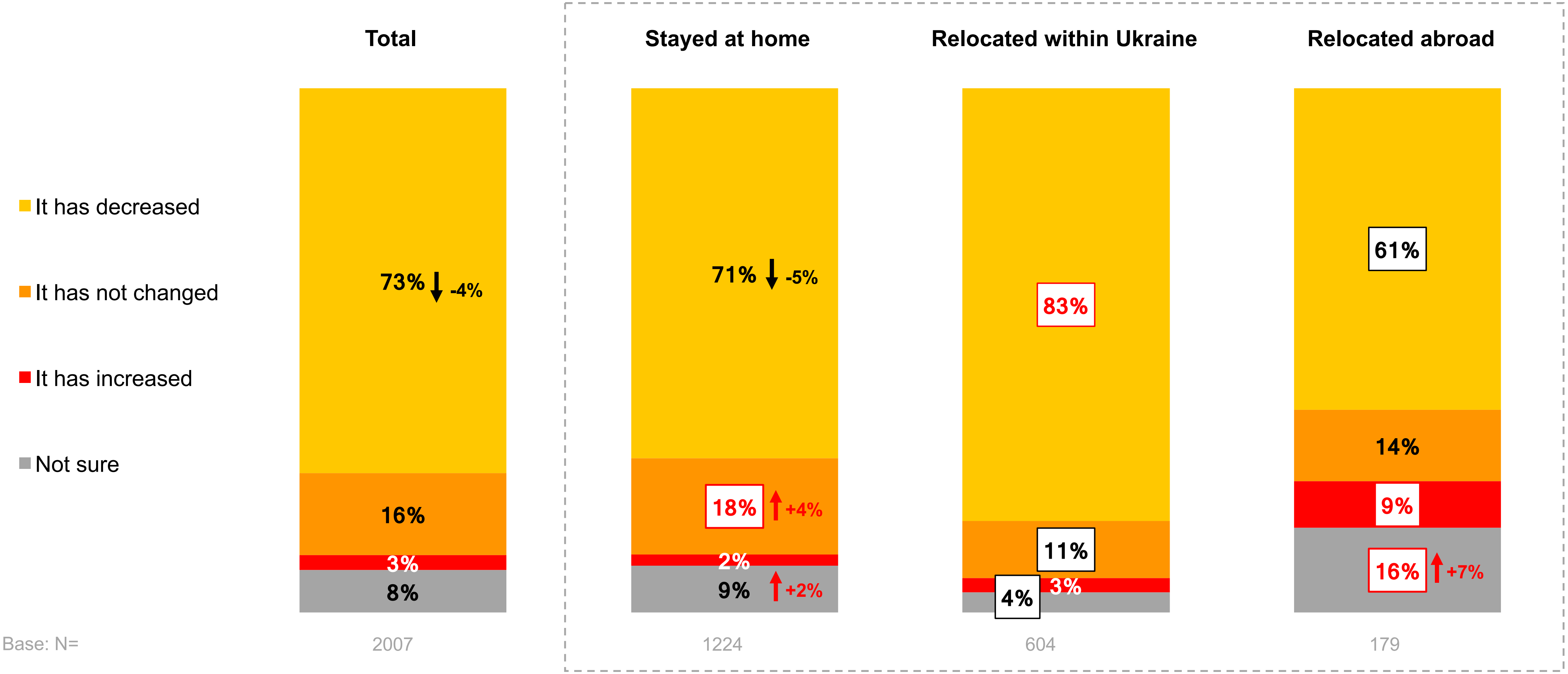
Base: respondents who are employed now
Do you receive salary?

Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

INCOME CHANGES
by migration status

The share of those who declare a decrease in income is the largest among internal migrants (83% vs 73%) and the smallest among those who have relocated abroad (61% vs 73%).



Base: all respondents
How has your income changed since the full-scale war had begun?

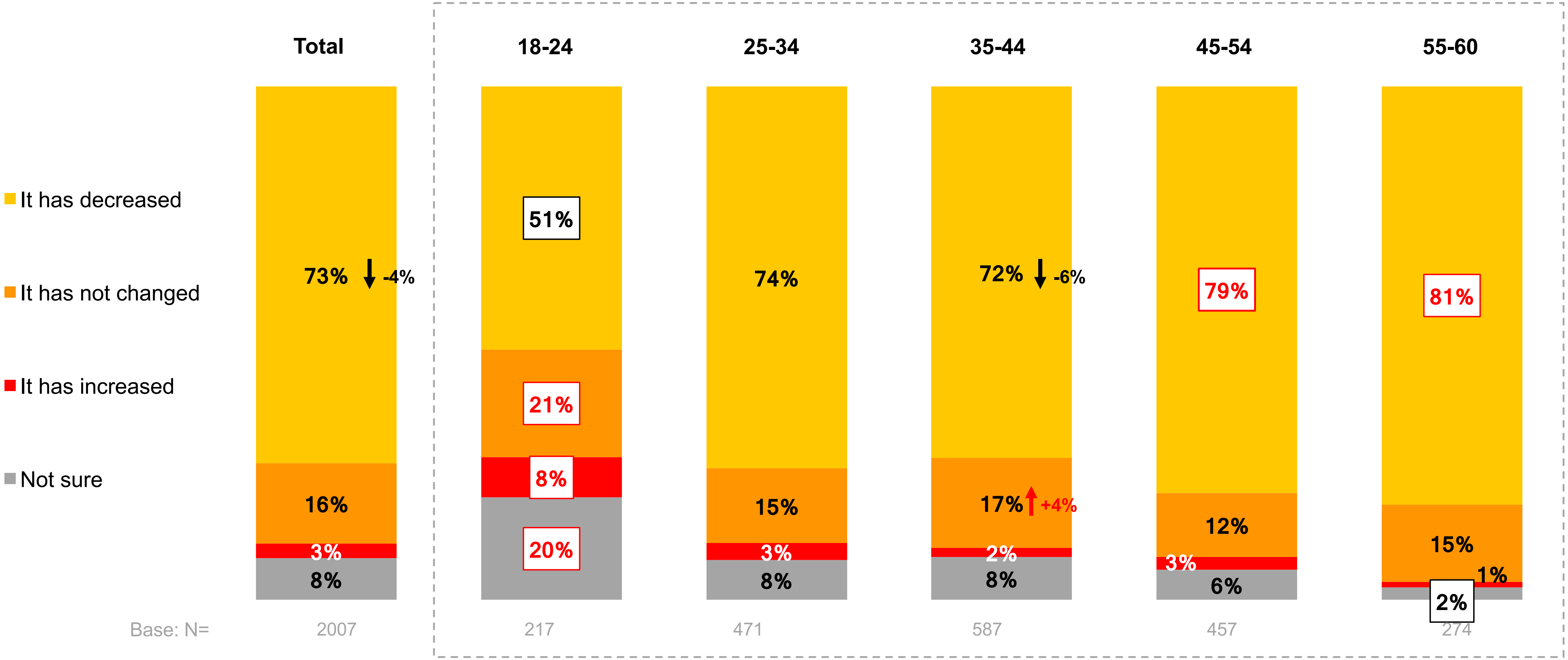
Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

INCOME CHANGES

by age

There are significantly more persons who declare a decrease in their income since the beginning of the full-scale war among the older age groups (45+), compared to the sample as a whole (79% and 81% vs 73%). At the same time, the smallest share of those whose level of income has decreased is among young people (18-24), compared to the sample as a whole (51% vs 73%).



Base: all respondents
How has your income changed since the full-scale war had begun?

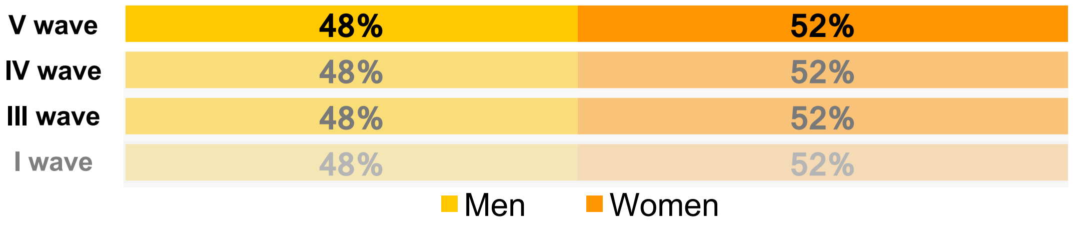
Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

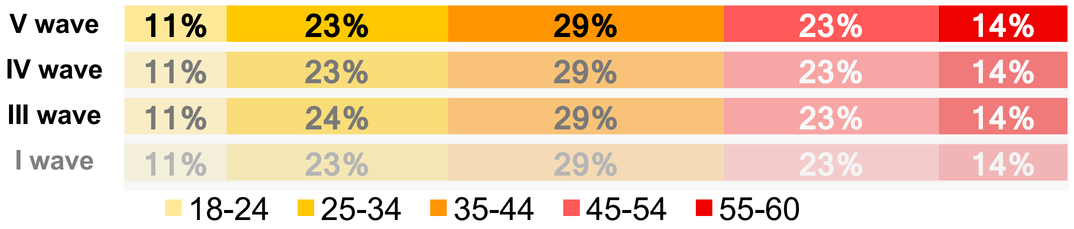
SAMPLE STRUCTURE

SAMPLE STRUCTURE

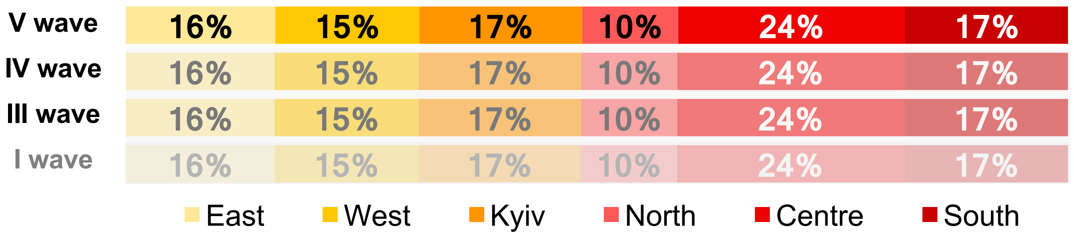
Gender



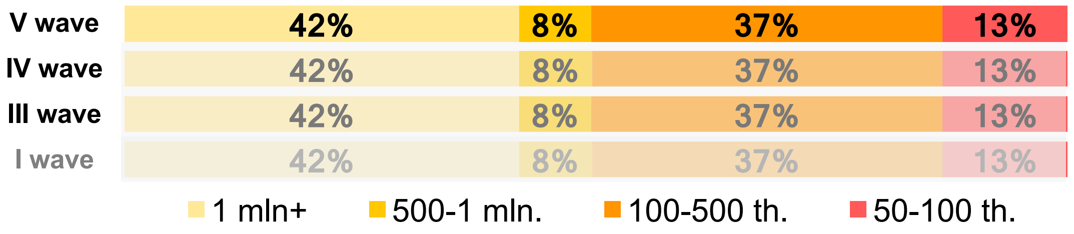
Age



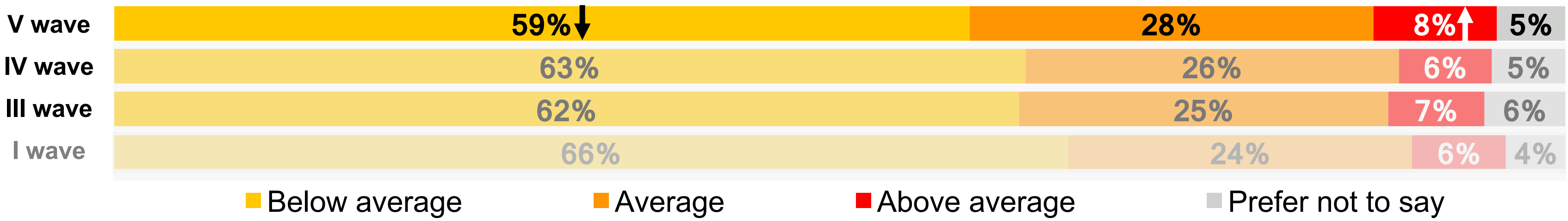
Region (before the war)



Size of settlement (before the war)



Income level

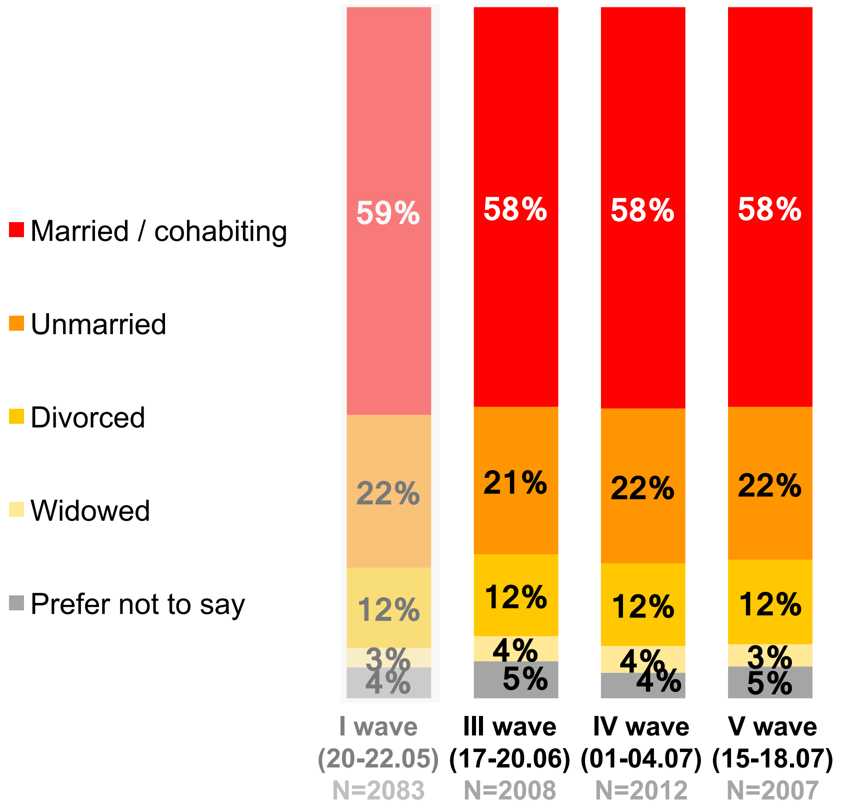


Base: all respondents, I wave (20-22.05), N=2083 | III wave (17-20.06), N=2008 | IV wave (01-04.07), N=2012 | V wave(15-18.07), N=2007

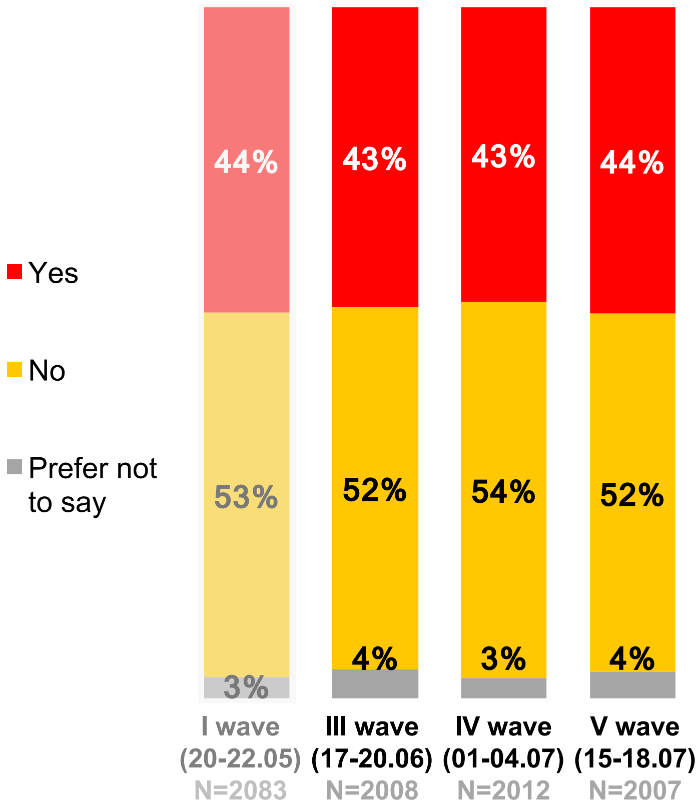
Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

SOCIO-DEMOGRAPHIC PROFILE

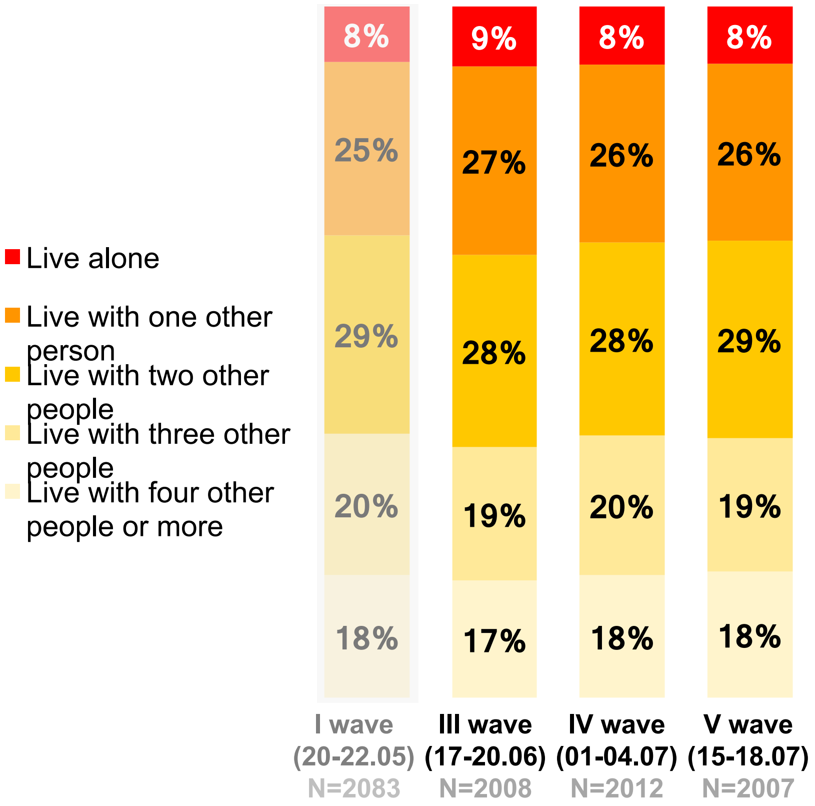
Marital status



Presence of children under the age of 18 who live with the respondents



Number of people who live in the household



Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

Base: all respondents

SOCIO-DEMOGRAPHIC PROFILE

by migration status (V wave)

		Total	Stayed at home	Relocated within Ukraine	Relocated abroad
Gender	Men	48%	49%	51%	29%
	Women	52%	51%	49%	71%
Age	18-24	11%	12%	8%	14%
	25-34	23%	21%	28%	26%
	35-44	29%	27%	33%	28%
	45-54	23%	25%	20%	19%
	55-60	14%	15%	11%	13%
Region (before the war)	East	16%	8%	32%	19%
	West	15%	19%	7%	16%
	Kyiv	17%	14%	22%	22%
	North	10%	9%	13%	7%
	Centre	24%	31%	11%	20%
	South	17%	19%	14%	17%
Income level	Below average	59%	61%	61%	38%
	Average	28%	27%	28%	33%
	Above average	8%	7%	8%	17%
	Prefer not to say	5%	5%	2%	12%
Marital status	Married / cohabiting	58%	57%	63%	50%
	Unmarried	22%	23%	21%	20%
	Divorced	12%	12%	11%	15%
	Widowed	3%	3%	3%	7%
	Prefer not to say	5%	5%	2%	8%
Presence of children under the age of 18 who live with the respondents	Yes	44%	40%	51%	52%
	No	52%	56%	47%	42%
	Prefer not to say	4%	4%	2%	6%
Number of people who live in the household	Live alone	8%	9%	7%	9%
	Live with one other person	26%	27%	22%	25%
	Live with two other people	29%	28%	30%	26%
	Live with three other people	19%	18%	22%	20%
	Live with 4 other people and more	18%	18%	19%	19%
	Base, N	*2007*	*1224*	*604*	*179*

Base: all respondents

Numbers that are statistically significantly higher / lower for a group, compared to the sample as a whole

APPENDIX

ADMINISTRATIVE UNITS WITHIN REGIONS* OF UKRAINE

Oblast	Region of residence
Donetsk oblast Luhansk oblast Kharkiv oblast	**East**
Volyn oblast Zakarpattia Oblast Ivano-Frankivsk oblast Lviv oblast Rivne oblast Ternopil oblast Chernivtsi oblast	**West**
Kyiv city	**Kyiv**
Zhytomyr oblast Kyiv oblast Sumy oblast Chernihiv oblast	**North**
Vinnytsia oblast Dnipropetrovsk oblast Kirovohrad oblast Poltava oblast Khmelnytsky oblast Cherkasy oblast	**Centre**
Zaporizhzhia oblast Mykolaiv oblast Odesa oblast Kherson oblast	**South**

*as used in the study

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