



Centre for
Economic
Recovery

Gradus
Research
Company



SOCIAL SCREENING OF UKRAINIAN SOCIETY DURING THE RUSSIAN INVASION – the seventh wave of the study*

Analytical report

August 2022

***This publication was produced with the financial support of the European Union. Its contents are the sole responsibility of the Center for Economic Recovery, NGO and Gradus Research, and do not necessarily reflect the views of the European Union.**



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



Target audience of the study: men and women, aged 18+, 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

VI wave – 2009

II wave – 2045

VII wave – 2005

III wave – 2008

IV wave – 2012

V wave – 2007



Field period of the survey (2022 year):

I wave – May 20 – May 22

VI wave – July 29 – August 1

II wave – June 3 – June 6

VII wave – August 12 – August 15

III wave – June 17 – June 20

IV wave – July 1 – July 4

V wave – July 15 – July 18

SUMMARY (1/4)

Ukrainians'* actions during the war

- The distribution of **Ukrainians' migratory status remains without significant changes in the seventh wave**: 61% of respondents **stayed at their permanent place of residence** (more often these are residents of the Center and the West – 79% and 75%, respectively); the rest (40%) of the audience **changed their place of residence**. Among **those who migrated**, 17% **have already returned home** (more often these are residents of Kyiv and the North – 30% and 29%, respectively), and 23% **continue to be far from home** (mainly these are residents of the East – 56%).
- As for the directions of migration, the share of people who **relocated abroad** has significantly decreased in the current wave (from 23% to 19%; mainly to Poland and Germany). At the same time, there is a slight increase in the share of people who migrated **to another oblast of Ukraine** (from 58% to 61%; mainly to Lviv and Ivano-Frankivsk oblasts) and in the share of those who migrated **within their own oblast** (from 18% to 20%).
- The distribution of answers regarding the desire to **relocate in the event of an aggravation of the situation** among Ukrainians* who **remained in Ukraine** is at the level of the previous wave: 55% have a desire to stay at their current place of residence, and 34% want to migrate (23% – within Ukraine, and 11% – abroad). At the same time, the share of people who do not have the **opportunity to relocate** in the event of an aggravation of the situation increased (from 41% to 44%) due to the decrease in the share of those who have the opportunity to migrate within the borders of Ukraine (from 33 to 29%). The opportunity of relocation abroad is at the level of the sixth wave and is at 20%.
- Among **external migrants**, the share of those who want to **return home at the first opportunity** continues to decrease: the indicator is currently at the level of 55%, while 20% of respondents **declare a desire to stay and live in another country**. In the seventh wave, the share of people who hesitate to answer the question increased (from 13% to 25%). At the same time, 69% of respondents declare that they have the opportunity to stay abroad, and 10% do not have such an opportunity.
- **Safety** in the settlement and, conversely, its absence remain the biggest **driver** (74%; the indicator increased from 59%) and, accordingly, the biggest **barrier to the return to Ukraine of those who went abroad** (79%).
- The distribution of answers of **internal migrants** regarding their desire to **stay and live in a new place** remains 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, there is a slight increase in the share of respondents who have the opportunity to stay living at their new place (from 41% to 48%) due to a slight decrease in the share of those who do not have such an opportunity (from 44% to 38%).
- The level of involvement of the respondents' family members in the **Armed Forces of Ukraine** and the **Territorial Defense Forces** remains unchanged – 23% and 15%, respectively. The level of respondents' own involvement in **volunteering** also has not changed and is at 20%.

SUMMARY (2/4)

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

- **Money** and **access to work** remain the most important things that more than a third of Ukrainians* need – that was noted by 66% and 34% of respondents, respectively. There were no significant differences in the answers compared to the previous period.
- In the seventh wave, the **state of Ukrainians'* physical health** continues to be **mainly at a low level**: absence of problems with physical health is declared by 42% of the audience, while absence of problems with mental health is declared by 38%; more than half of the audience note that they have some or many health problems: 59% indicate having problems with physical health and 62% – with mental health.
- The evaluation of the **attitude of the population of the area where the respondents relocated because of the war** continues to be at "friendly" for the majority of migrants (84%).
- **Indicators of subjective perception** by Ukrainians* of their own **safety** in the seventh wave improved slightly: the share of those who do not feel safe decreased from 21% to 18% (mainly due to the increase in the share of those who hesitate to answer the question); however more than half (63%) of the respondents still feel unsafe (45% – sometimes, and 18% – on a permanent basis).
- The share of Ukrainians* who received **humanitarian aid from the Ukrainian state** did not change significantly and is at 34%. Food (76%) and money (44%) remain the most common forms of aid that people received. The evaluation of sufficiency of the assistance remains unchanged: 47% consider it sufficient, and 46% – insufficient.
- Also, the share of Ukrainians* who received **humanitarian aid from a foreign country where they relocated because of the war** remained unchanged – the assistance was received by 68% of respondents. The form of the received aid also remained unchanged: more than half of the respondents received money, food, clothes, temporary housing, and hygiene products. The assessment of received assistance as sufficient remains at the level of the sixth wave and is at 79%.

SUMMARY (3/4)

Perception of the full-scale war with Russia

- In the seventh wave, there have been no significant changes in the evaluation of the **effectiveness of the actions of the Ukrainian authorities during the war**. The highest evaluations of the effectiveness of the Ukrainian authorities' actions are in the sphere of military protection of the country from the aggressor (66%) and actions since the war had begun in general (61%). The effectiveness of assistance to citizens who have lost their property and/or source of income is evaluated the lowest: about a third (30-34%) of Ukrainians* evaluate these actions as effective.
- **The Armed Forces of Ukraine (63%), the President of Ukraine (46%), and volunteer organizations (32%)** are the leaders of the trust rating (with no changes compared to the previous wave). In the current wave, the level of trust in the Armed Forces of Ukraine increased (+8%) among the 55+ age group.
- **The optimism of Ukrainians* regarding the future of the state does not fade** – more than half of the respondents are confident that Ukraine will be able to build a strong economy, rebuild everything that was destroyed and become a member of the EU by 2030. Compared to the previous wave, the share of those 55 and older who believe that Ukraine will be able to build a strong economy has significantly increased, while among the 45-54 group, there was an increase in the share of those who believe that the state will rebuild everything and reimburse all the costs.
- 90% of respondents are convinced that **Russians must be banned from entering other countries**. Most often, the respondents note the need for banning the entry of Russians to such countries as Ukraine (79%), EU countries (75%), the USA (66%) and Canada (62%).
- 59% of respondents who **have school-age children** are not ready to send their children to receive **full-time in-person education at school** – instead, they prefer **distance education**; at the same time, less than a third of respondents (26%) are ready for traditional full-time education. Residents of the Western region are most ready for full-time education of their children (37%), while residents of the Northern region are the least ready (9%). The main **reasons** for giving **preference to full-time education** are the need for live communication of the child with peers (72%) and teachers (70%), as well as low quality of distance education (59%). On the other hand, the main **reasons for choosing distance education** are the lack of safe places / shelters in the school (59%), feeling of anxiety when the child is not around (48%) and teachers' unpreparedness for possible crisis situations (26%). For 59% of the interviewed parents, the main condition for them to be ready to send their children to get full-time education in Ukrainian schools is the end of the war.

SUMMARY (4/4)

Latest news

- Among the **news** that was in the media space last week, **the most important**, according to Ukrainians*, were the news stories about explosions at military airfields / facilities in Crimea (28%), news about the war in general (12%), and shelling of the Zaporizhzhia NPP (10%) – such were the answers to the open-ended question.
- 92% of respondents are **aware of at least one of the four latest news stories**: 80% know about the large-scale explosions at Russian military airfields in Crimea, 63% – about the strikes of Russian missiles on the territory of the Zaporizhzhya NPP, 63% – about Ukraine's continuous shelling of important (for Russia) bridges in the Kherson oblast, and 48% – about Ukraine they **did not make them want to change their current place of residence**. Among 18% of those who have the desire to migrate because of these events, the most common direction of desired movement is relocation within Ukraine (42%).
- 72% of respondents support holding **the EXPO World Exhibition in 2030 in Ukraine** (in Odesa), and 77% agree that holding this exhibition will contribute to attracting investments to the state.

Employment during the war

- **The general indicator of employment among Ukrainians* did not change in the seventh wave of the study: 59% of Ukrainians* are employed and have a job.** The largest share of employed people is recorded among residents of Kyiv and the Central region.
- Among the audience that currently working, 75% receive a salary, but only 27% of them are confident that they will continue to receive payment in the future (the highest share is among residents of the West – 36%), while 48% do not have such confidence.
- 35% indicated that they are not employed. The share of unemployed is higher among those who went abroad (50%) and residents of the Central region (42%). Regarding the specifics of unemployment, 33% indicated that they had lost their job after the full-scale invasion, while 44% were unemployed before it began.
- **Similarly, the majority (76%) of Ukrainians* note that their income has decreased since the beginning of the full-scale invasion.** The largest share of those whose income has decreased is recorded among those 45 and older, as well as among internal migrants, while the smallest is among the 18-24 age group.

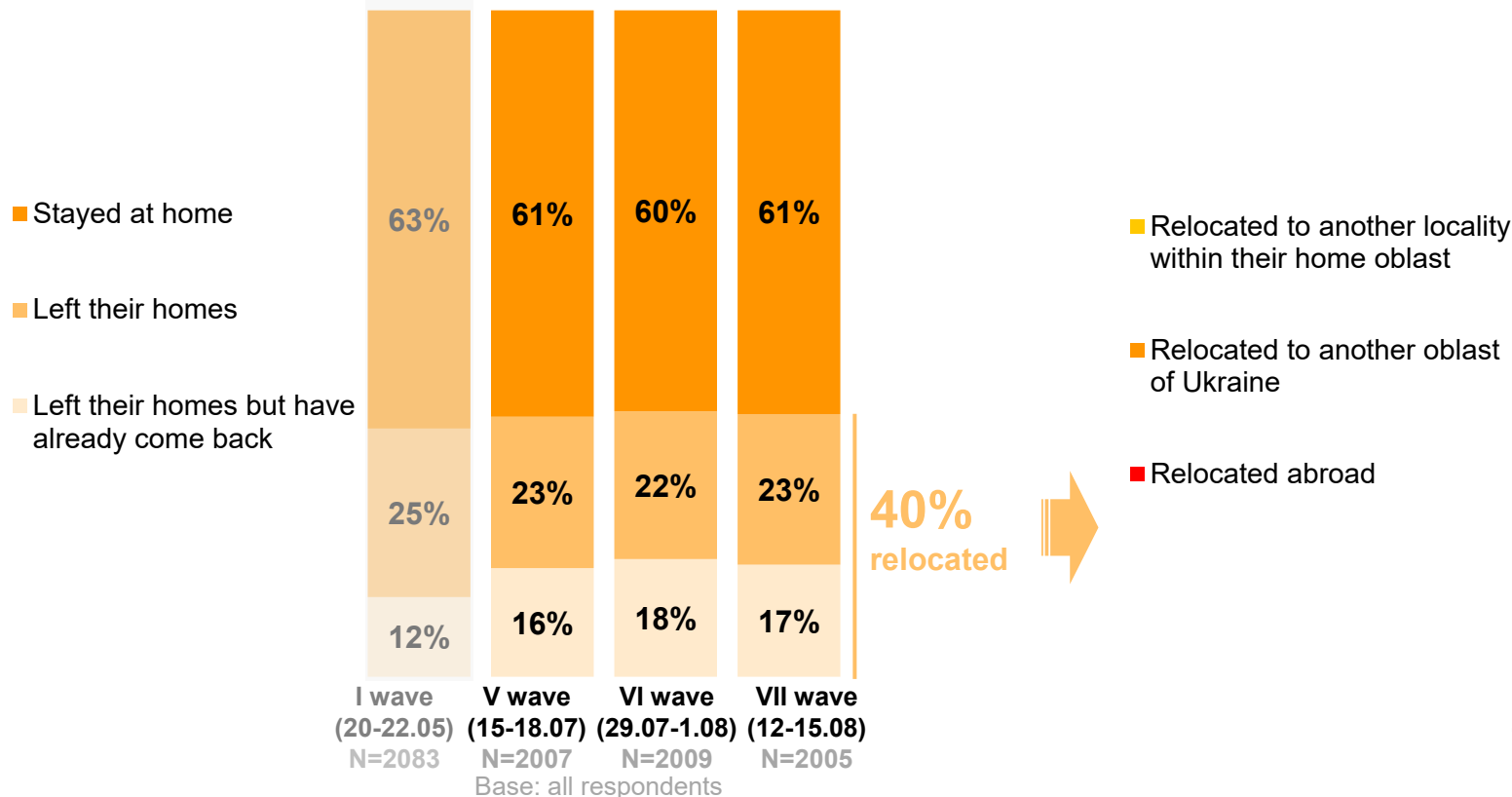
UKRAINIANS'* ACTIONS DURING THE FULL-SCALE WAR

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

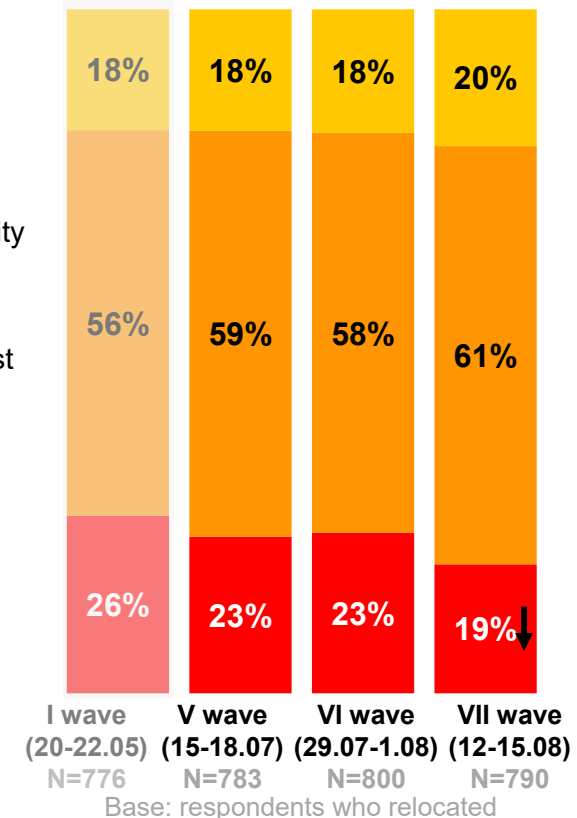
RELOCATION OF UKRAINIANS* DUE TO THE WAR

Migration patterns of Ukrainians* remain without significant changes in the seventh wave, compared to the previous wave: 61% of respondents stayed at home, 40% changed their place of residence (23% of them continue to stay in their new place, and 17% have already returned). In the current wave, the share of those who relocated abroad decreased significantly (from 23% to 19%) due to a slight increase in the share of those who declared migration within their oblast (from 18% to 20%) and relocation to other oblasts within of Ukraine (from 58% to 61%).

Relocation of Ukrainians* due to the war



Relocation specifics



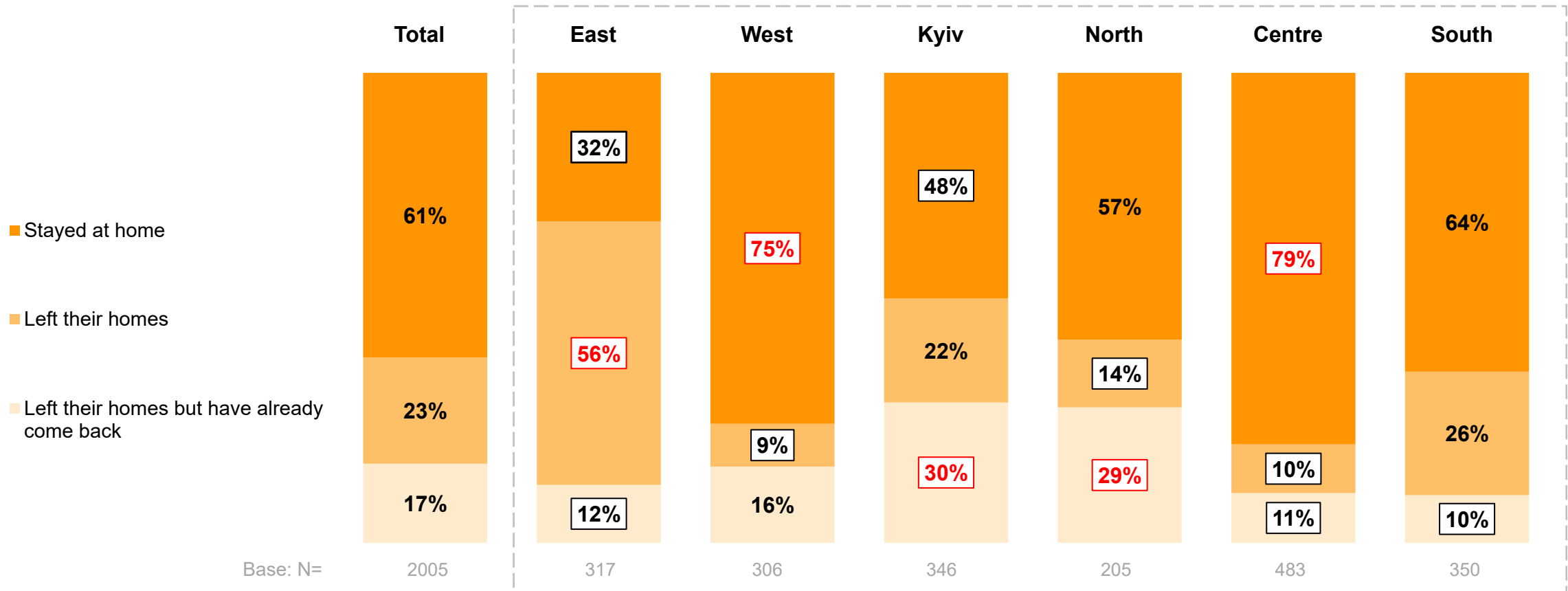
*Ukrainians - residents of cities with population of 50 thousand and more, aged 18+ years, who use smartphones
Which of the following phrases best reflects your actions in the situation of Russia's war against Ukraine:
In which direction were you forced to move::

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

RELOCATION DUE TO THE WAR

by regions



There are no significant differences in migration patterns depending on the region in the seventh wave. Residents of the Western and Central regions, compared to the sample as a whole, more often stayed at their permanent place of residence, while residents of the Eastern region - left their homes; at the same time, residents of the North and Kyiv more often declare returning home after temporary migration.



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

Base: all respondents

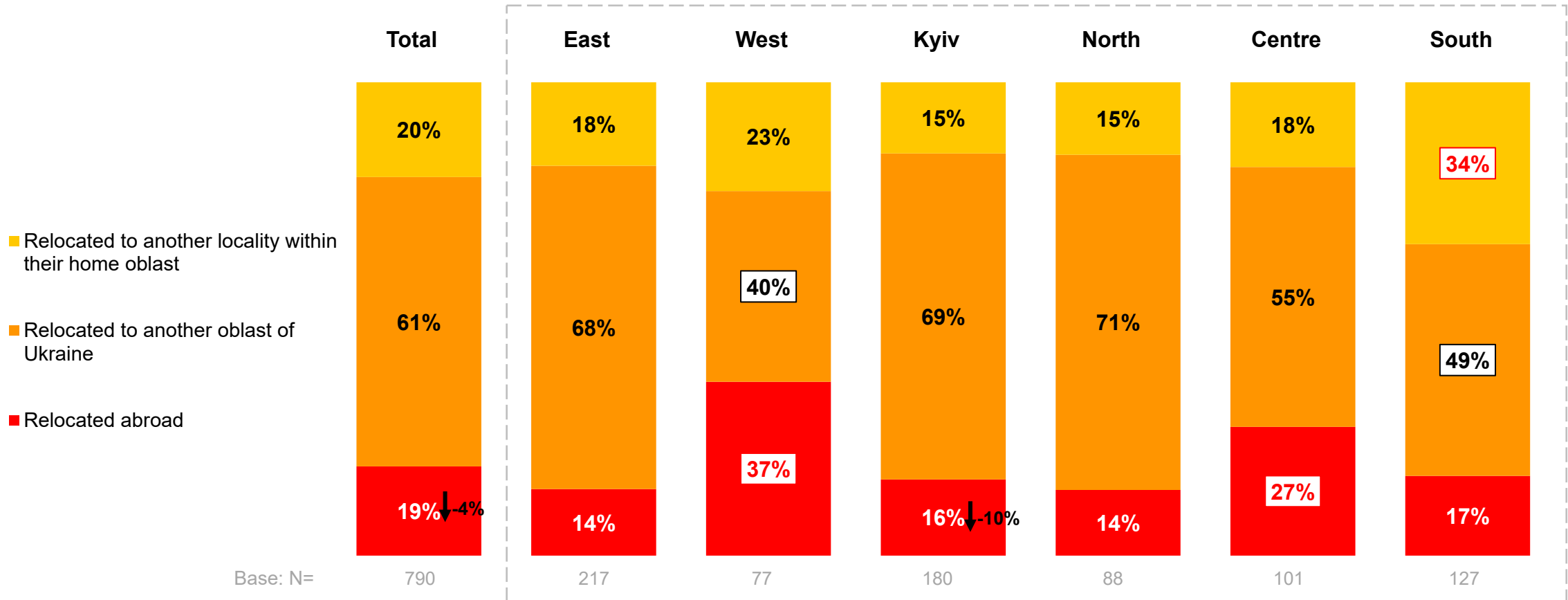
Which of the following phrases best reflects your actions in the situation of Russia's war against Ukraine:

 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 significant differences between waves in the regional distribution of directions of relocation (with the exception of a decrease in the share of those who migrated abroad from 26% to 16% among residents of Kyiv). In general, the residents of the West and the Center, compared to the sample in general, more often relocated abroad, while the residents of the South - migrated within their 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

The most popular oblasts for internal migration are Lviv and Ivano-Frankivsk oblasts.

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

		Oblast from which relocated																
		Total	Kyiv city	Kharkiv oblast	Donetsk oblast	Chernihiv oblast	Dnipropetrovsk oblast	Zaporizhzhia oblast	Luhansk oblast	Kherson oblast	Mykolaiv oblast	Kyiv oblast	Odesa oblast	Cherkasy oblast	Zhytomyr oblast	Lviv oblast	Ivano-Frankivsk oblast	Volyn oblast
Oblast to which relocated (TOP-12)	Lviv oblast	12%	12%	5%	3%	5%	26%	34%	0%	19%	7%	17%	35%	0%	9%	0%	42%	43%
	Ivano-Frankivsk oblast	10%	13%	7%	7%	2%	14%	14%	0%	27%	0%	4%	0%	4%	0%	29%	0%	14%
	Cherkasy oblast	9%	8%	2%	3%	68%	2%	2%	4%	0%	4%	13%	5%	0%	19%	0%	0%	0%
	Zakarpattia Oblast	9%	13%	3%	7%	0%	3%	9%	31%	0%	0%	15%	8%	4%	58%	28%	11%	13%
	Vinnitsia oblast	9%	10%	8%	15%	0%	6%	8%	0%	17%	0%	10%	22%	41%	6%	0%	0%	0%
	Dnipropetrovsk oblast	7%	4%	11%	20%	0%	0%	25%	23%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Poltava oblast	6%	9%	18%	4%	1%	0%	0%	0%	0%	15%	0%	0%	0%	0%	0%	0%	0%
	Khmelnitsky oblast	5%	6%	2%	0%	8%	20%	0%	0%	0%	3%	21%	0%	0%	0%	0%	0%	0%
	Kirovohrad oblast	5%	5%	4%	2%	0%	7%	0%	7%	5%	16%	3%	4%	39%	0%	0%	0%	0%
	Kyiv city	5%	0%	7%	13%	1%	4%	3%	3%	13%	16%	0%	0%	0%	0%	0%	0%	0%
	Chernivtsi oblast	5%	2%	9%	0%	4%	8%	3%	0%	0%	0%	0%	12%	13%	0%	10%	25%	15%
	Zhytomyr oblast	4%	8%	1%	4%	0%	6%	0%	0%	3%	0%	10%	0%	0%	0%	0%	0%	0%
Base: respondents who relocated to another oblast of Ukraine		483	124	75	55	36	33	20	17	16	15	14	12	12	10	9	7	6

Only oblasts from which more than 5 respondents have relocated are shown.
The oblast to which people were forced to relocate:

* 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 common destinations of immigration.

<div></div> <div>Oblasts from which 10 or more respondents have relocated are marked by colour</div>		Oblast from which relocated								
		Total	Zhytomyr oblast	Donetsk oblast	Chernihiv oblast	Kirovohrad oblast	Cherkasy oblast	Ivano-Frankivsk oblast	Kherson oblast	Luhansk oblast
Country to which relocated (TOP-13)	Poland	32%	18%	15%	46%	20%	79%	10%	56%	75%
	Germany	15%	9%	9%	22%	17%	0%	44%	0%	9%
	Slovakia	10%	8%	49%	0%	3%	0%	0%	0%	0%
	France	5%	5%	0%	7%	10%	7%	0%	0%	0%
	Czech Republic	4%	2%	6%	0%	0%	5%	0%	35%	9%
	Italy	4%	4%	12%	0%	0%	0%	0%	0%	0%
	Belgium	3%	15%	0%	0%	3%	0%	0%	0%	0%
	Lithuania	3%	5%	0%	0%	7%	0%	0%	0%	0%
	Netherlands	2%	0%	0%	14%	7%	0%	0%	0%	0%
	USA	2%	5%	0%	0%	0%	0%	0%	0%	0%
	Denmark	2%	8%	0%	0%	0%	0%	0%	0%	0%
	Spain	2%	5%	0%	0%	0%	0%	0%	0%	0%
	Bulgaria	2%	0%	3%	0%	3%	0%	15%	0%	0%
	Base: respondents who relocated to another country	149	29	17	16	12	10	9	5	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)

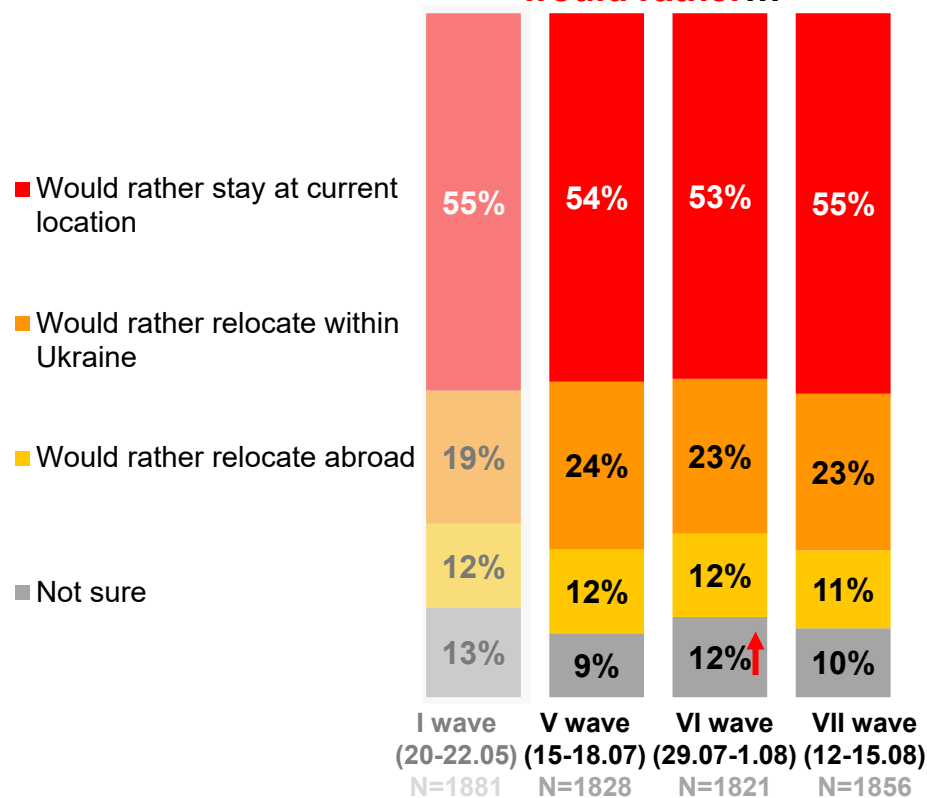
↓ ↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

RELOCATION IN CASE OF AGGRAVATION. WISHES & OPPORTUNITIES

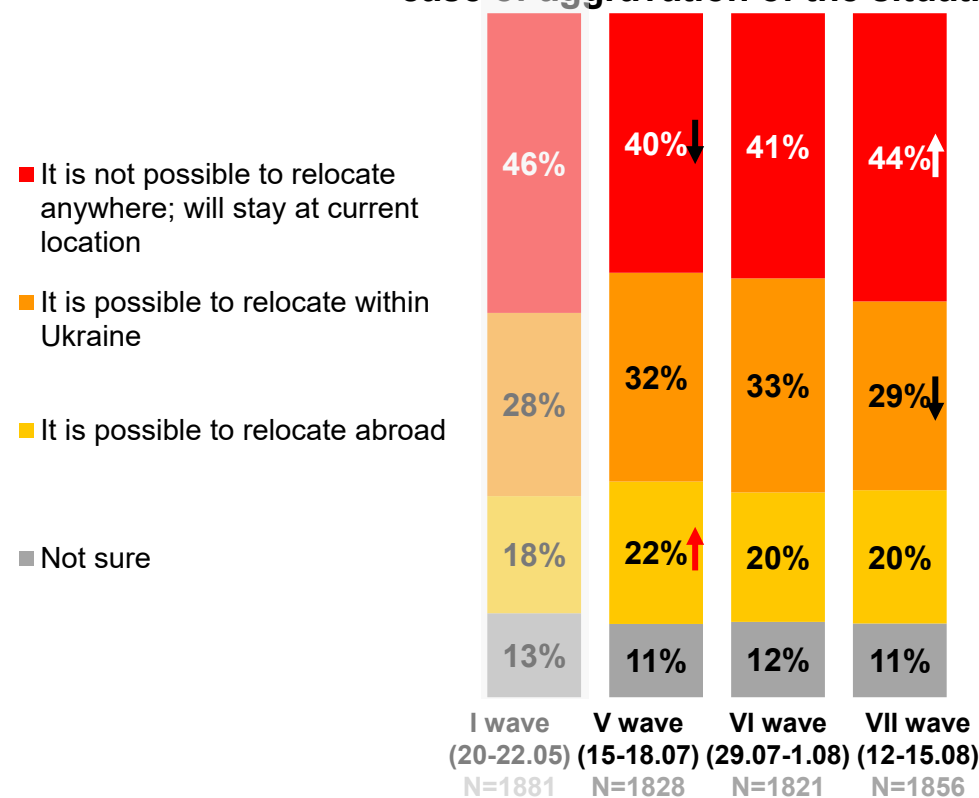
The distribution of answers regarding the desire to relocate in the event of an aggravation of the situation in the current wave remains unchanged: 55% of respondents who remained in Ukraine want to stay at their currently place, 23% want to migrate within the country, and 11% want to relocate abroad. At the same time, in the seventh wave, the share of those who do not have the opportunity to relocate in case of an aggravation of the situation increased (from 41% to 44%) due to the decrease in the share of those who have the opportunity to migrate within the country (from 33% to 29%). The share of those who have the opportunity to relocate abroad remained unchanged and is 20%.

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?

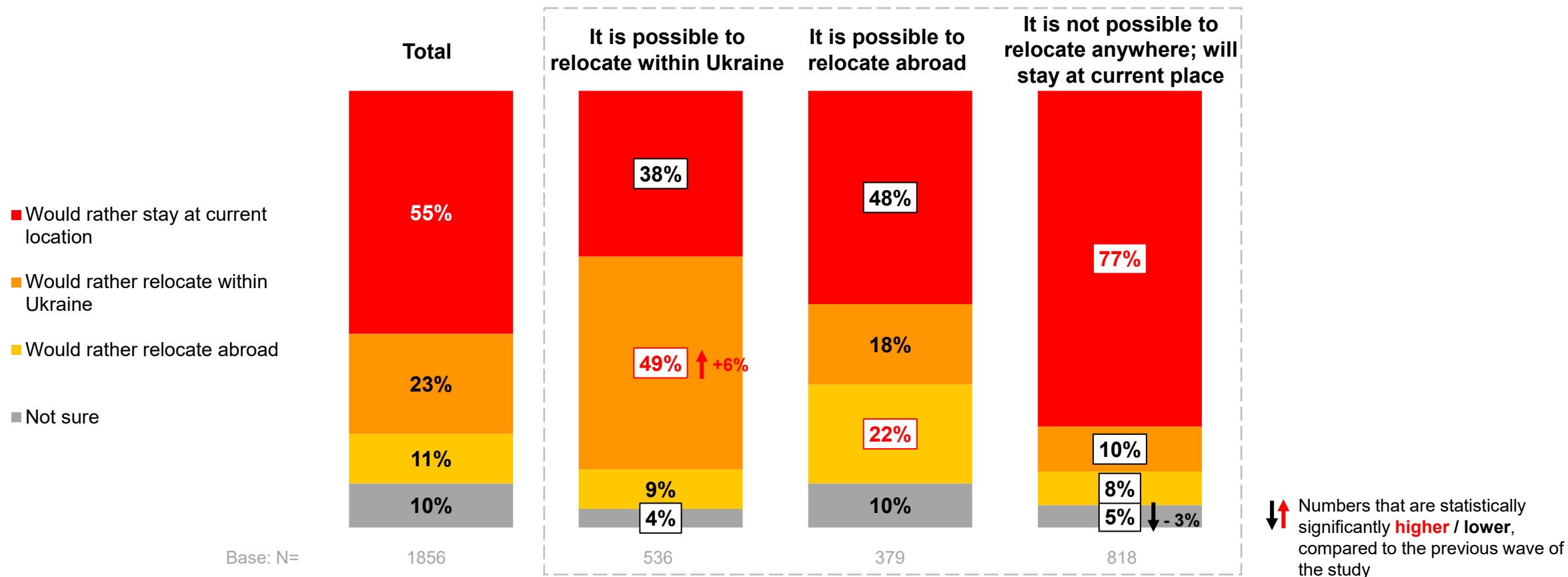
In case of further exacerbation, is it possible for you to relocate further away, go abroad or stay where you are now?

↓↑ 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


Compared to the fifth wave, among those who have the opportunity to migrate within Ukraine, the share of those who want to stay and relocate within Ukraine has increased (from 43% to 49%).



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 structure of those who stayed at home, there was an increase in the share of people who want to stay at their current place of residence (from 61% to 66%) and in the share of those who do not have the opportunity to move anywhere in case of an exacerbation of the situation (from 45% to 50%). In general, IDPs* more often have the intention and ability to change their place of residence in the event of an aggravation of the situation, while those who did not leave their homes more often strive to continue to stay there. They retain more opportunities for re-migration within Ukraine than those who stayed at home.

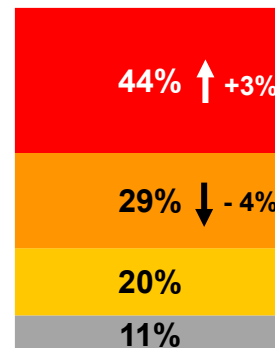
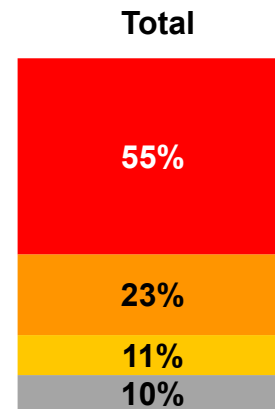
In case of aggravation of the situation **would rather...**

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

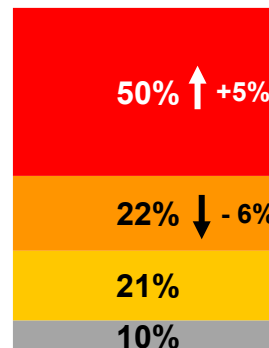
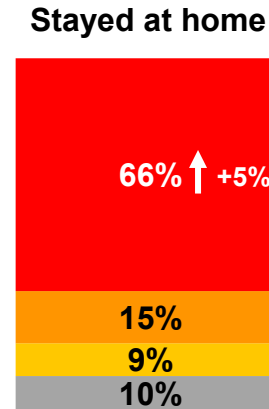
Possibility to relocate further away in case of aggravation of the situation

- 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

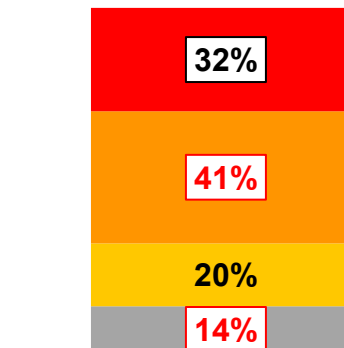
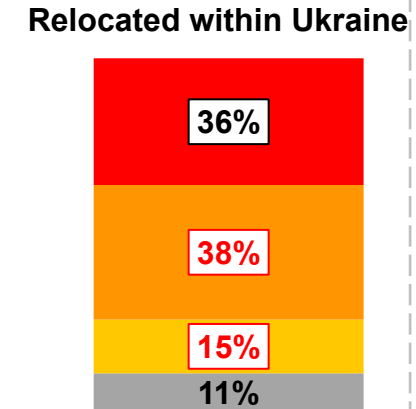
Base: N=



1856



1215



641



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

*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?

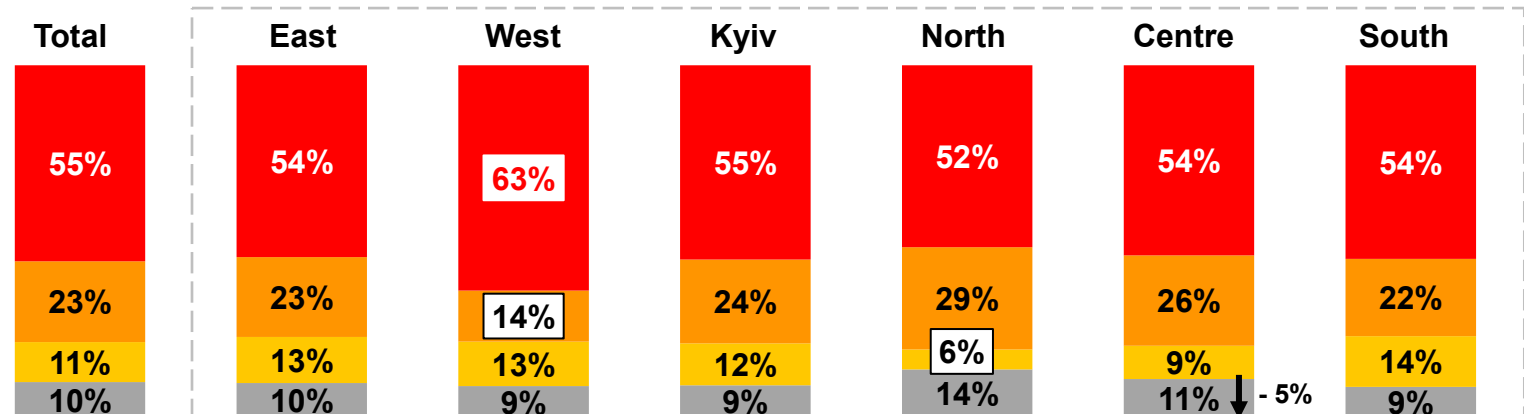
RELOCATION IN CASE OF AGGRAVATION. WISHES & OPPORTUNITIES

by region

Compared to the sixth wave, the share of residents of the West and Centre who declare that they do not have an opportunity to relocate anywhere has increased significantly (from 39% to 50% in the West, from 36% to 47% in the Centre). In turn, the regional distribution regarding the desire to relocate remained at the level of the previous wave.

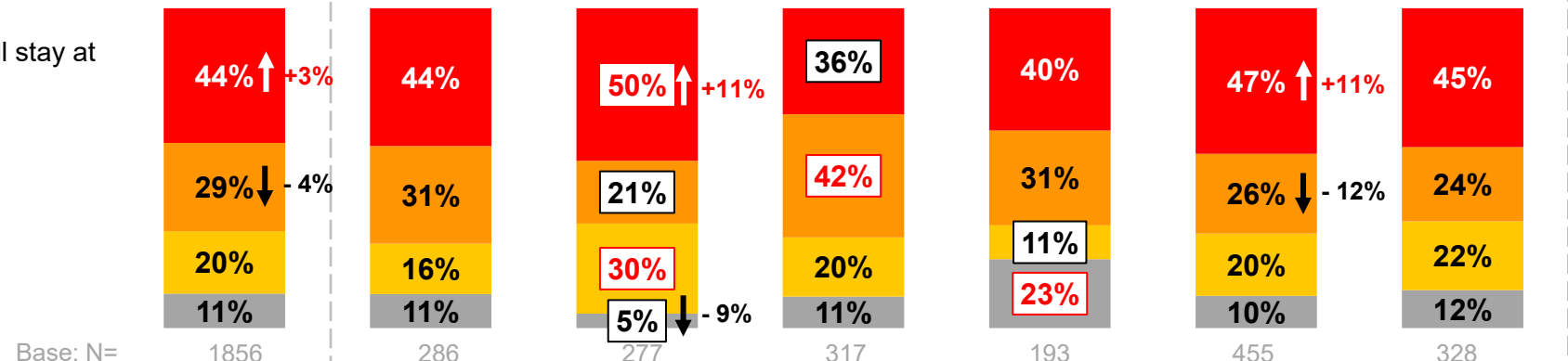
In case of aggravation of the situation **would rather...**

- 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: N=

1856

286

277

317

193

455

328

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

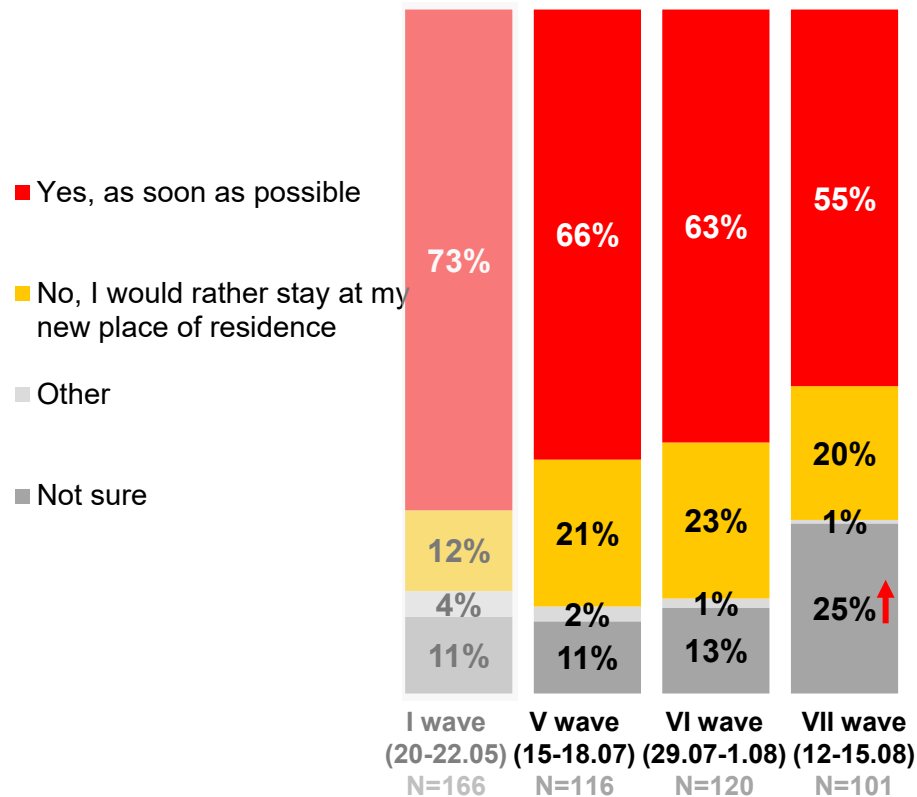


Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

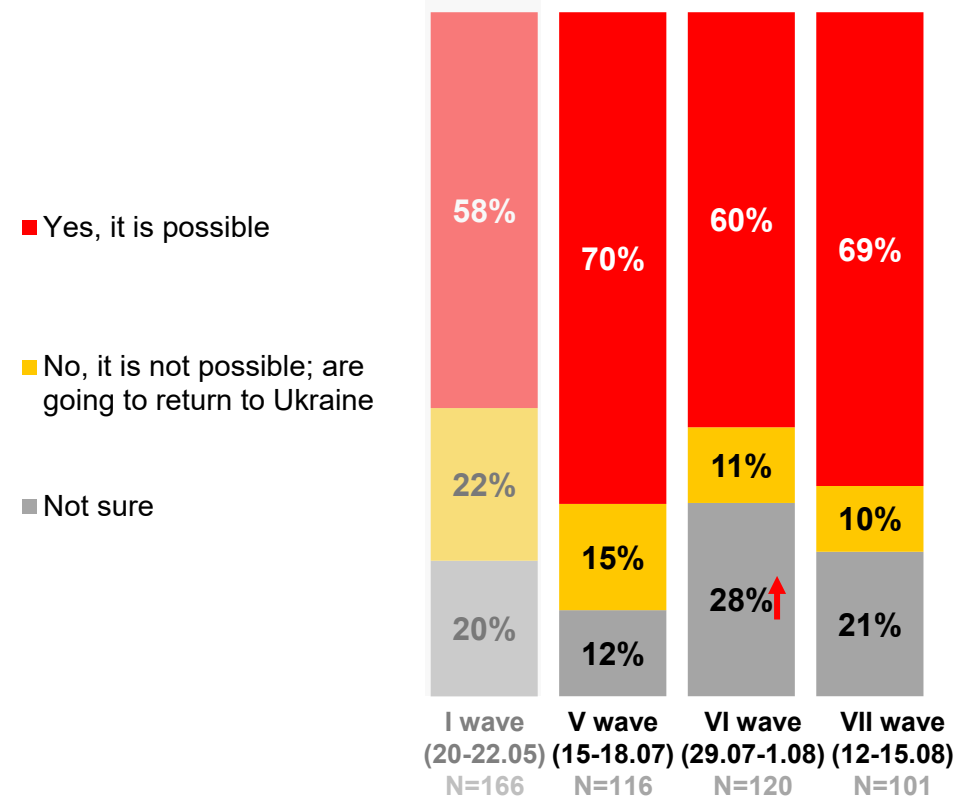
WISHES REGARDING COMING BACK FROM ABROAD. POSSIBILITY OF STAYING THERE

In the current wave of the study, there was an increase in the share of people who are currently abroad and hesitate to answer about their desire to return to Ukraine (from 13% to 25%). In general, 55% of respondents note that they want to return to Ukraine at the first opportunity, while 20% - want to stay at their new place of residence. At the same time, the distribution of answers regarding the possibility of staying in a new place remained unchanged: 69% have such an opportunity, and 10% do not have it.

Wishes regarding coming back from abroad



Possibility of staying abroad



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?

DRIVERS OF RETURNING TO UKRAINE

For people who relocated abroad and have not yet returned from there, the biggest drivers of returning remain the safety factor in the locality (74%, increased from 59% in the previous wave), the desire to return home to a normal life (53%), the availability of housing in Ukraine (increased from 36% to 51%) and availability of paid work in Ukraine (increased from 35% to 50%). In addition, compared to the previous wave, there was an increase in the share of those for whom the driver of returning to Ukraine is love for the country (from 26% to 39%).

	IV wave (01-04.07) N=129	V wave (14-18.07) N=116	VI wave (29.07-1.08) N=120	VII wave (12-15.08) N=101
Safety in the settlement	56%	44%	59% ↑	74% ↑
Return home (to normal life)	51%	44%	50%	53%
Availability of housing in Ukraine	43%	33%	36%	51% ↑
Availability of paid work in Ukraine	38%	36%	35%	50% ↑
Love for Ukraine	45%	37%	26%	39% ↑
Reunion with family	45%	31% ↓	25%	35%
Availability of development prospects in Ukraine	35%	22% ↓	36% ↑	33%
Willingness to live and grow in Ukraine	32%	41%	30%	33%
Lower cost of living in Ukraine	22%	18%	21%	30%
Better access to health care in Ukraine	21%	20%	19%	29%
Resumption of business in Ukraine	18%	16%	16%	15%
Better access to school education in Ukraine*		9%	6%	10%
Better access to higher education in Ukraine*		7%	2%	8%

*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?

BARRIERS TO RETURNING TO UKRAINE.

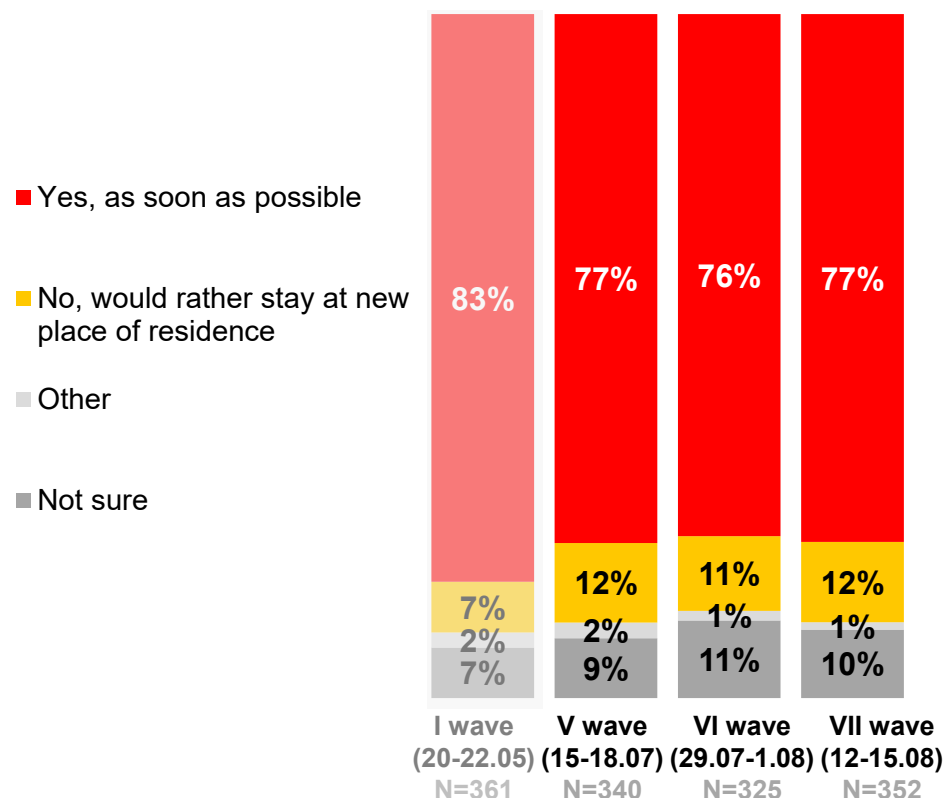
The lack of safe conditions remains the main barrier to returning from abroad for 79% of respondents (at the level of the previous wave). Also, among the barriers to returning, there was an increase in the percentage of mentions regarding the availability of paid work in the host country (from 11% to 27%) and development prospects abroad (from 8% to 19%).

	IV wave (01-04.07) N=129	V wave (14-18.07) N=116	VI wave (29.07-1.08) N=120	VII wave (12-15.08) N=101
Lack of conditions for a safe life in Ukraine	78%	65% ↓	79% ↑	79%
Absence of a paid job in Ukraine	38%	30%	39%	51%
Better living conditions in the host country	15%	25% ↑	23%	31%
Availability of paid work in the host country	14%	10%	11%	27% ↑
Availability of development prospects abroad	8%	9%	8%	19% ↑
Inability to go abroad again	14%	17%	14%	18%
Absence / loss of residence in Ukraine	27%	19%	17%	17%
Availability of housing in host country	11%	5%	6%	10%
Lack of access to quality healthcare in Ukraine	9%	9%	10%	5%
Lack of access to quality education in Ukraine	6%	10%	7%	5%

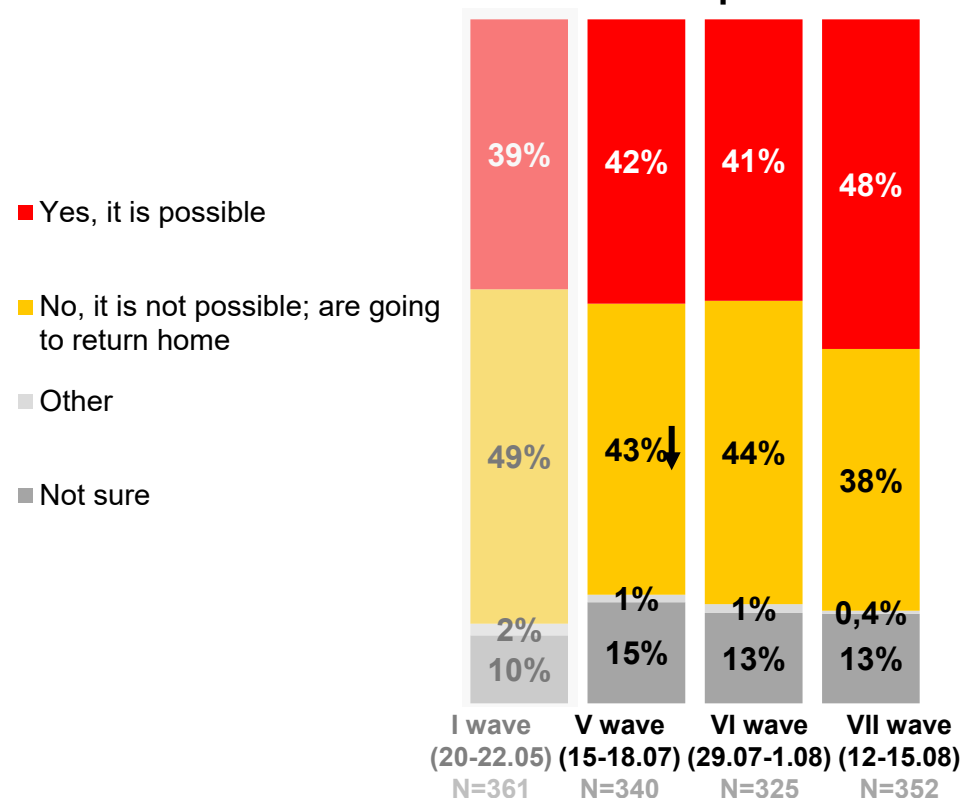
INTERNALLY DISPLACED PERSONS' WISHES REGARDING COMING BACK. POSSIBILITY OF STAYING WHERE THEY ARE

The distribution of answers regarding the desire of IDPs* to change their current place of residence remained unchanged in the seventh wave of the study. Thus, 77% want to return home at the first opportunity, and 12% want to stay and live in a new place. In general, compared to the previous wave, the share of respondents who declare the possibility of staying in a new place slightly increased (from 41% to 48%) due to the decrease of those who do not have such an opportunity (from 44% to 38%).

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

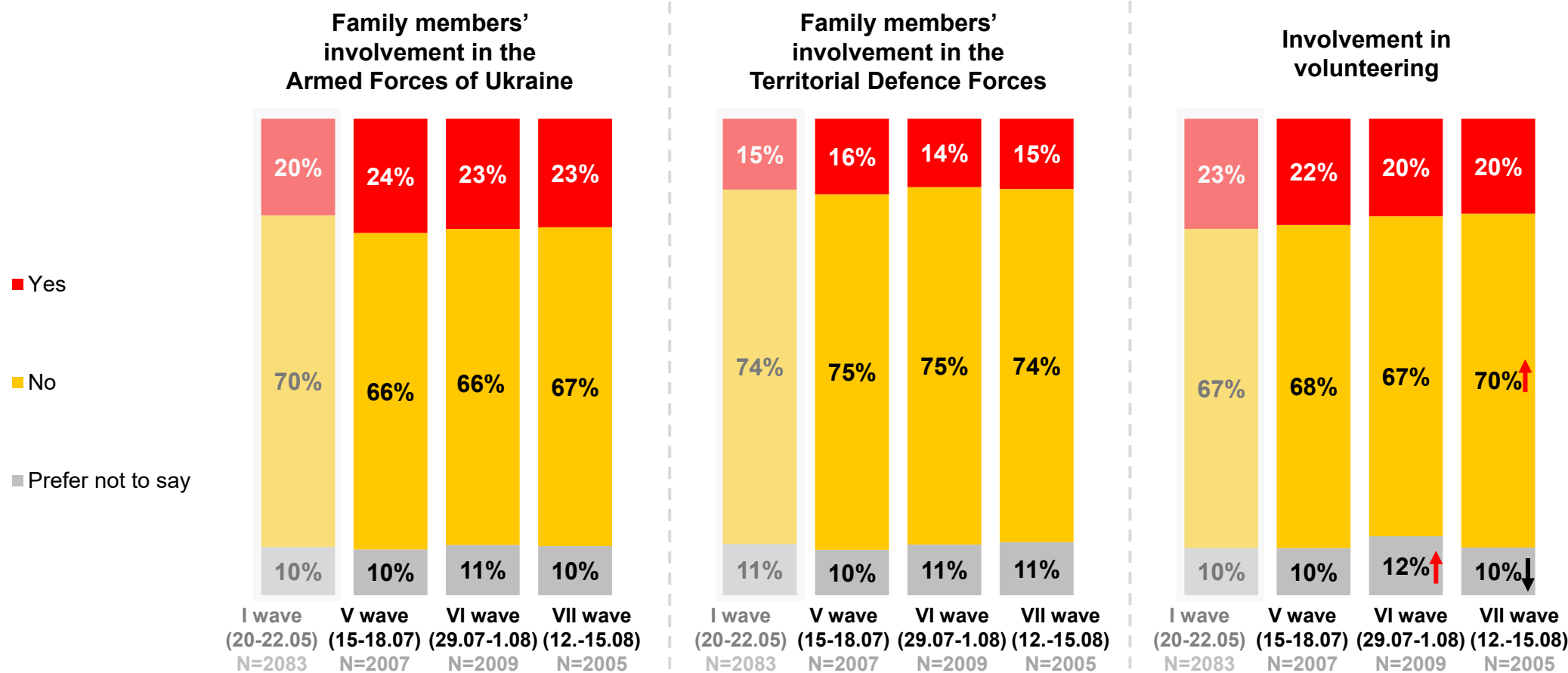
Do you want to return to your permanent place of residence when/if the hostilities there are over?

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 respondents' family members in the Armed Forces of Ukraine and Territorial Defense Forces remained without significant changes in the seventh wave - 23% and 15%. The level of self-participation of the respondents in volunteer activities also remained unchanged – 20%.



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?

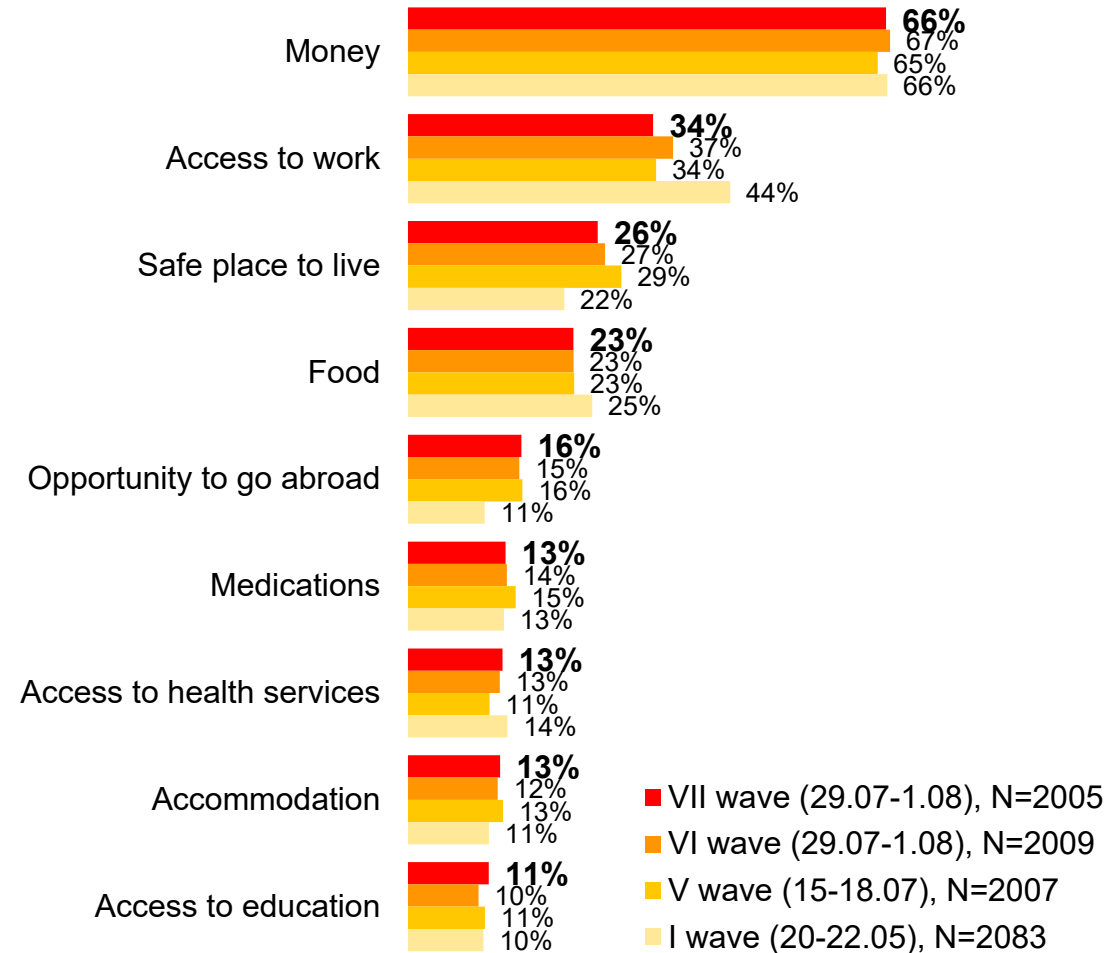
↓↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study



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

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

THINGS THAT ARE NEEDED MOST

In the seventh wave, the rating of things that respondents feel the greatest need for remains unchanged. More than a third of respondents indicated the need for money (66%) and access to work (34%).





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

FAMILIES' NEEDS

by migration status


The needs by migration status remain at the level of the previous wave. In general, respondents who stayed at home less often than the sample in general need for access to work (30% vs 34%) and housing (6% vs 13%), while internal migrants, on the contrary, need it more often (43% vs 34% - access to work and 23% vs 13% - housing), as well as opportunities to relocate abroad (19% vs 16%). External migrants more often express the need for housing (21% vs 13%) and access to health services (19% vs 13%), and at the same time less often express the need for money (50% vs 66%), access to work (25% vs 34%), food (14% vs 23%) and opportunities to relocate abroad (8%).


	Total	Stayed at home*	Relocated within Ukraine	Relocated abroad
Money	66%	68%	66%	50%
Access to work	34%	30%	43%	25%
Safe place to live	26%	24%	29%	31%
Food	23%	22%	26%	14%
Opportunity to go abroad	16%	15%	19%	8%
Medications	13%	14%	14%	9%
Access to health services	13%	12%	14%	19%
Accommodation	13%	6%	23%	21%
Access to education	11%	11%	12%	14%
Base: N=	2005	1215	641	149

*"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 sixth wave, the residents of Kyiv began to express the need for medicines less often (from 11% to 6%), while the residents of the Centre, on the contrary, began to declare the need for medications and food products more often (medications - from 9% to 13%, food products - from 18% to 24%). In general, residents of the East and South express a greater need for certain things, compared to residents of other regions.

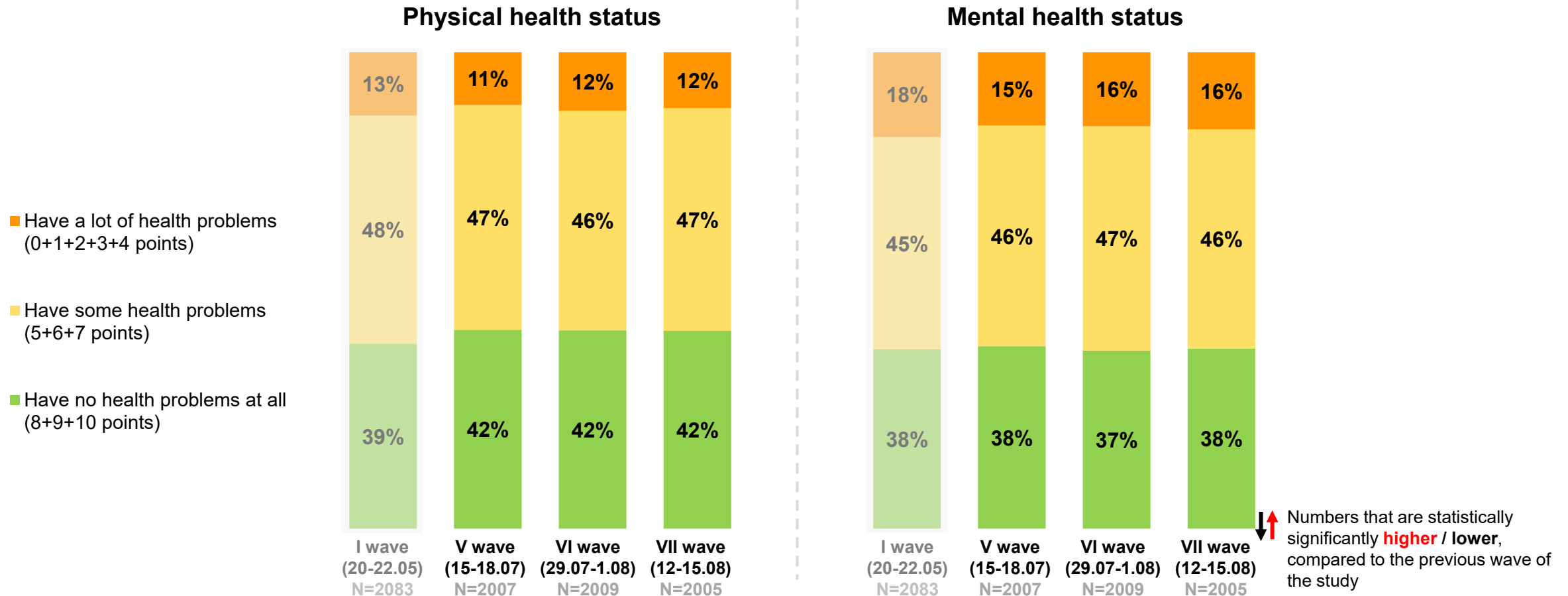
	Total	East	West	Kyiv	North	Centre	South
Money	66%	69%	58%	62%	73%	67%	68%
Access to work	34%	48%	26%	33%	41%	24%	39%
Safe place to live	26%	31%	20%	23%	27%	24%	32%
Food	23%	27%	16%	19%	22%	24% ↑ +6%	29%
Opportunity to go abroad	16%	15%	13%	19%	9%	16%	19%
Medications	13%	18%	10%	6% ↓ -5%	9%	13% ↑ +4%	22%
Access to health services	13%	18%	9%	11%	7%	11%	20%
Accommodation	13%	29%	7%	9%	11%	10%	12%
Access to education	11%	13%	10%	12%	9%	12%	10%
Base: N=	2005	317	306	346	205	483	350

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

Assessments of the state of physical and mental health remain unchanged in the seventh wave: about half (47% and 46%) of the respondents have some problems, 42% and 38% claim not to have any, and 12% & 16% have many problems (according to their own declaration).



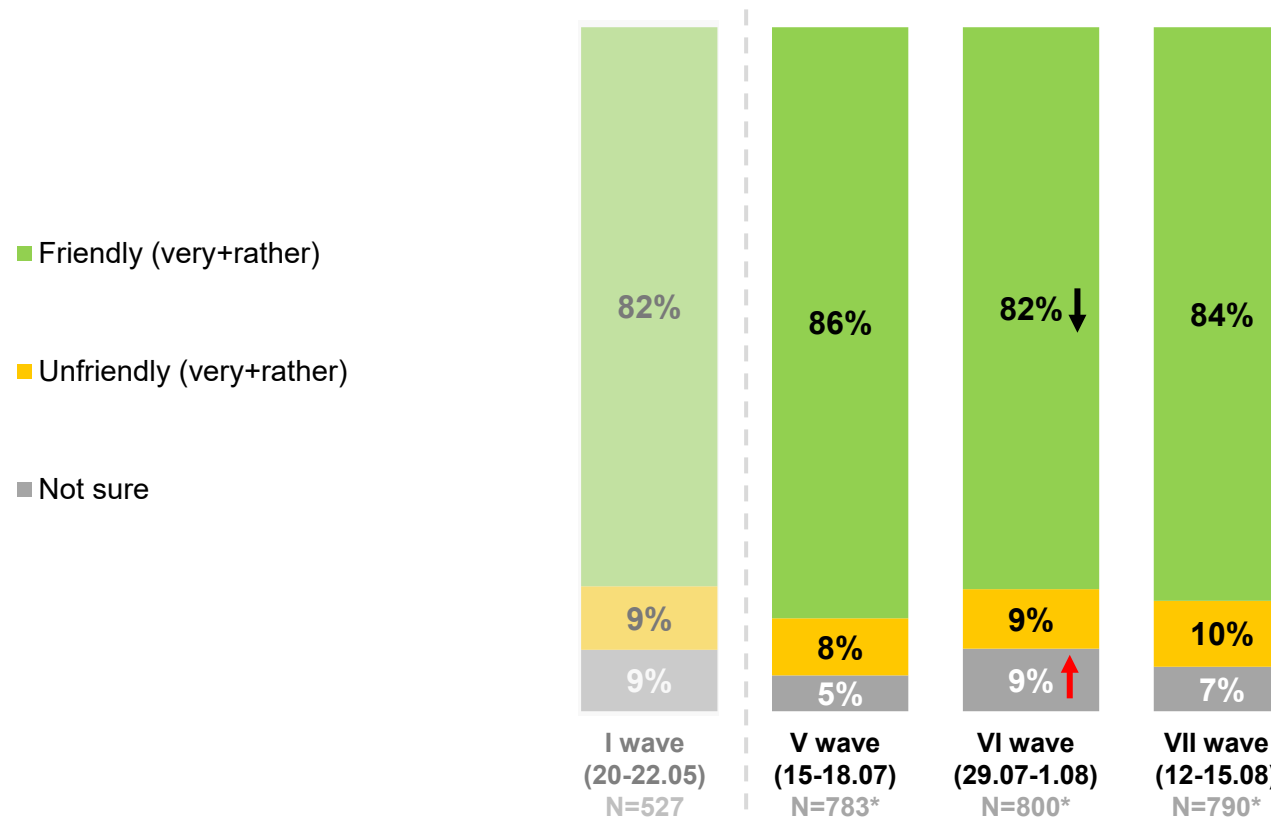
Base: all respondents

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 assessment of the local population's attitude towards respondents continues to be high: 84% of the audience that changed their place of residence continues to evaluate the attitude of the local population towards them as rather or very friendly. There were no recorded significant changes compared to the previous wave.



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

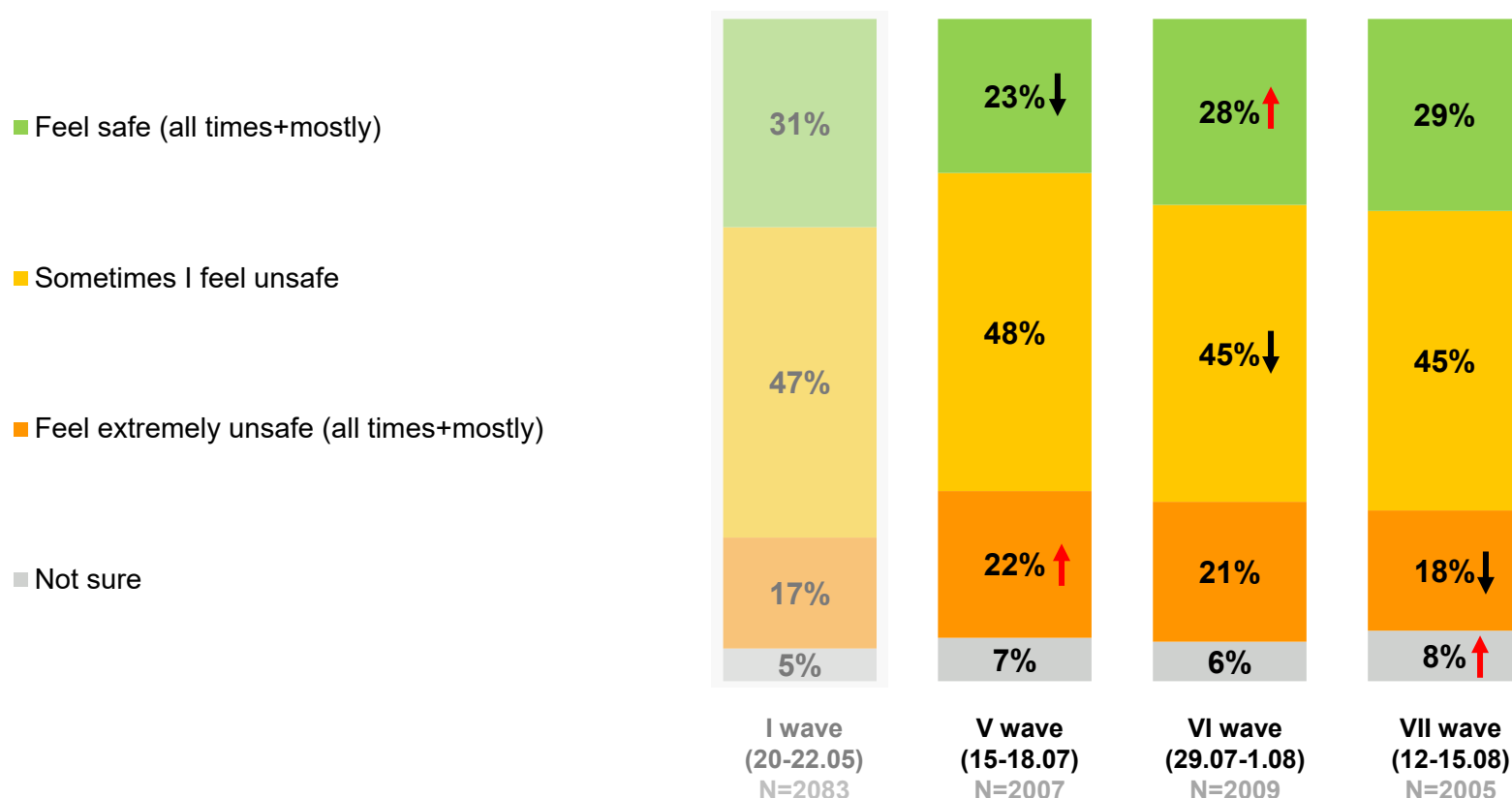
Base: respondents who changed their locations

* 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

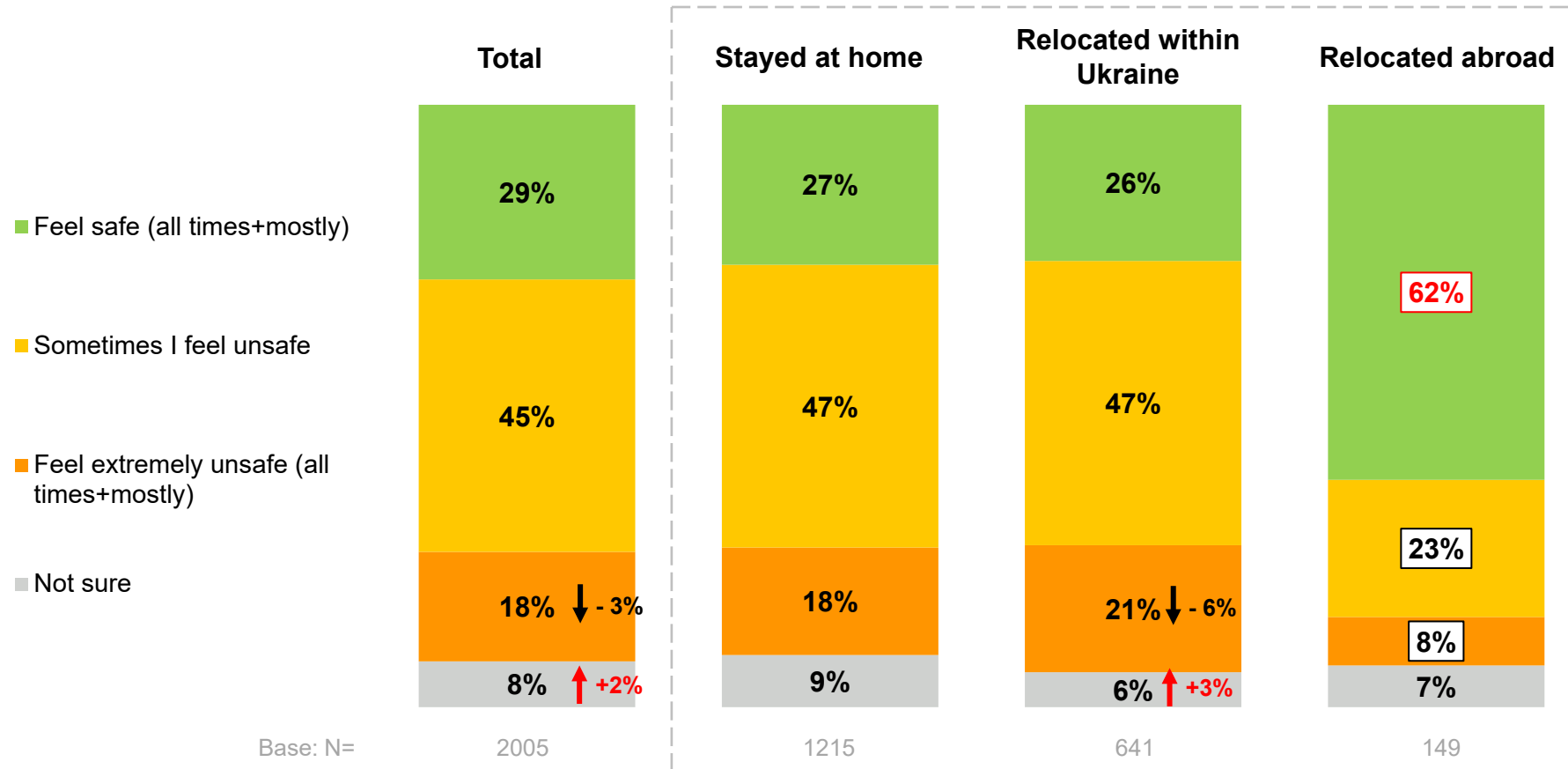
Compared to the sixth wave, the share of those who do not feel safe constantly or most of the time decreased significantly (from 21% to 18%), mainly due to an increase in the share of people who hesitate to answer the question. In general, the share of those who sometimes feel unsafe remained at the level of the previous wave - 45%, and the share of those who feel safe constantly or most of the time - 29%.



PERCEIVED SAFETY

by migration status

In the seventh wave, among internal migrants, there was a significant decrease in the share of those who do not feel safe constantly or most of the time (from 27% to 21%). In general, external migrants feel safe constantly or most of the time (62% vs 29%) more often than other migration groups.



Base: all respondents

Which of the following statements best describes your current state?

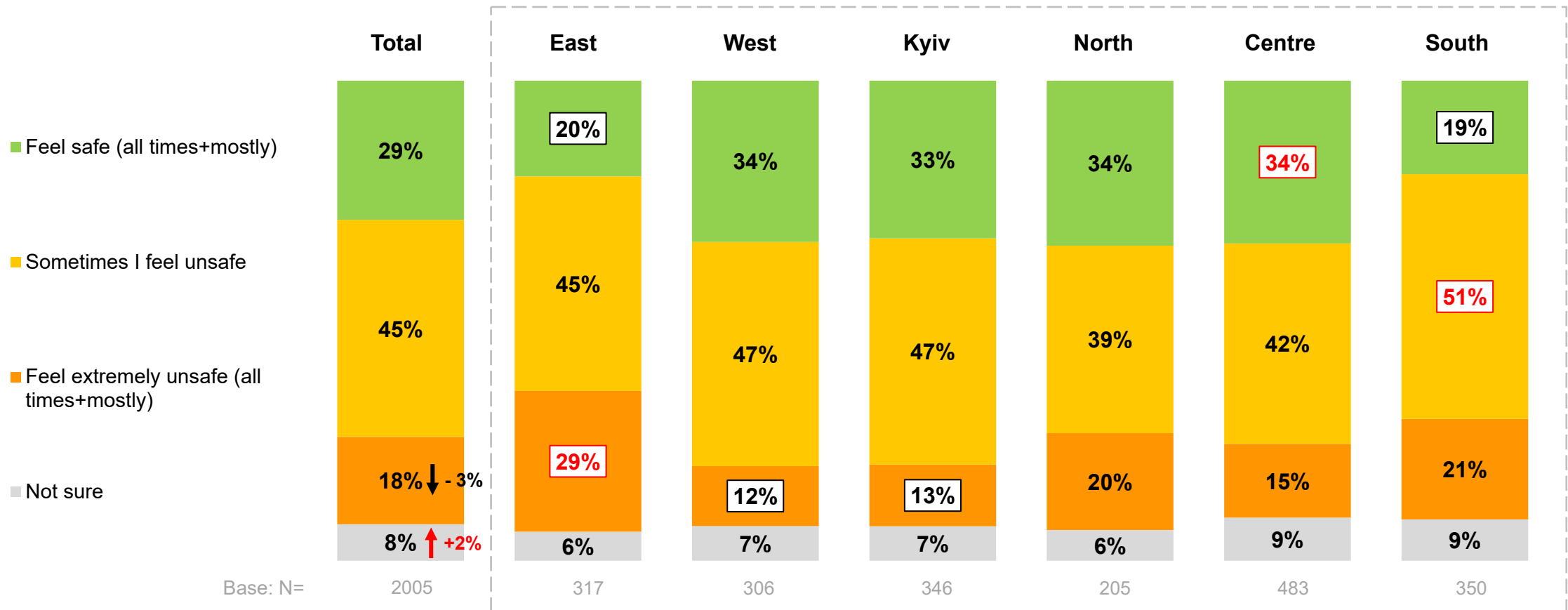
Numbers that are statistically significantly **higher** / **lower** for the group, compared to the sample as a whole

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

PERCEIVED SAFETY

by region

The feeling of safety depending on the region remains unchanged in the current wave. In general, residents of the East more often than representatives of other regions do not feel safe constantly or most of the time (29% vs 18%), residents of the South more often sometimes feel unsafe (51% vs 45%), while residents of the South - feel safe constantly or most of the time (34% vs 29%).



Base: all respondents

Which of the following statements best describes your current state?

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

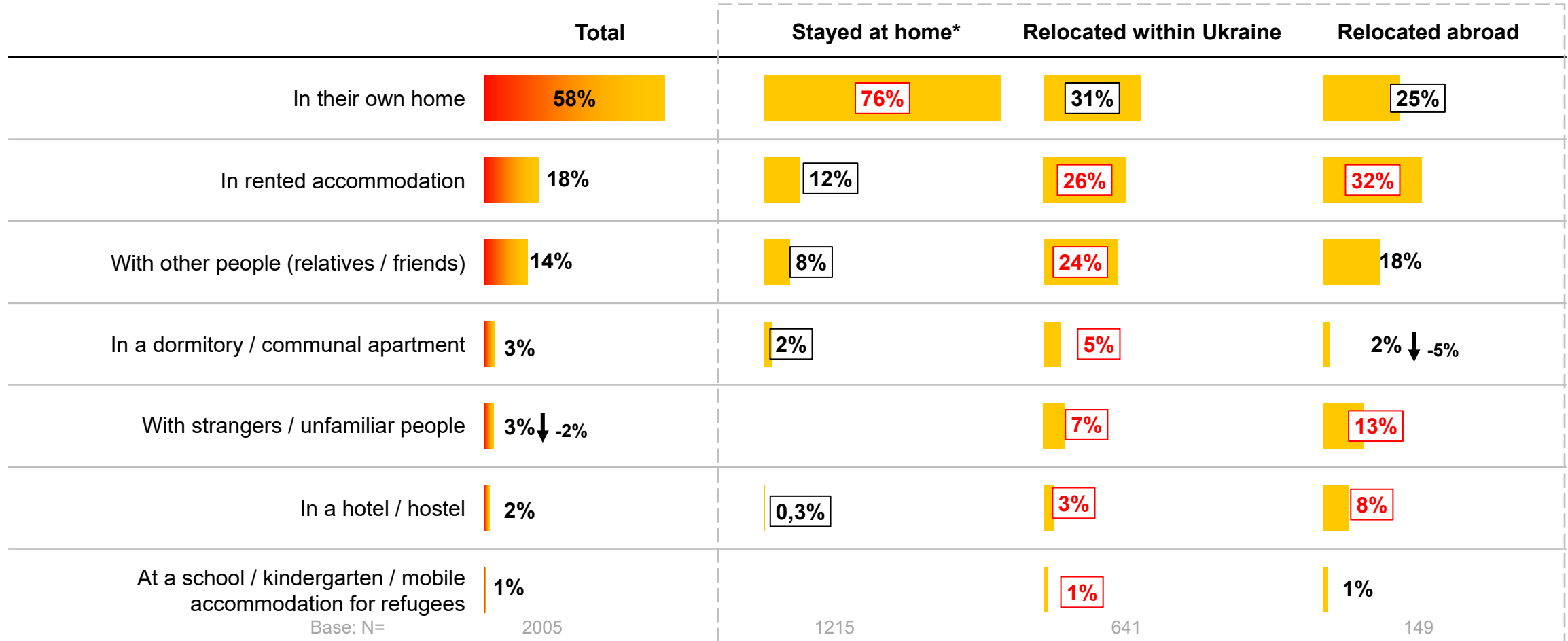
The place of residence of the vast majority of respondents in the seventh wave remained unchanged. 58% of respondents continue to live in their own home. Other common places of residence include rented housing (18%) and housing of relatives / acquaintances (14%). Compared to the previous wave, there was a decrease in the share of those who declare living with strangers (from 5% to 3%).

	I wave (20-22.05) N=2083	V wave (15-18.07) N=2007	VI wave (29.07-1.08) N=2009	VII wave (12-15.08) N=2005
In their own home	59%	57%	58%	58%
In rented accommodation	16%	17%	17%	18%
With other people (relatives / friends)	13%	13%	13%	14%
In a dormitory / communal apartment	4%	4%	3%	3%
With strangers / unfamiliar people	4%	6% ↑	5%	3% ↓
In a hotel / hostel	2%	1%	2% ↑	2%
At school / kindergarten / mobile accommodation for refugees	2%	1%	1%	1%

CURRENT RESIDENCE

by migration status

Compared to the previous wave, there was a decrease in the share of external migrants who live in a dormitory / communal apartment. In general, those who stayed at home* more often live in their own accommodation, while migrants (external and internal) more often live in other places.



*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 East less often declare current residence in their own home compared to the sample as a whole (29% vs 58%), while residents of the Western, Northern and Central regions, on the contrary, more often live in their own home. In the seventh wave, among residents of the Eastern and Central regions, there was a decrease in the share of those who mentioned living with strangers.

	Total	East	West	Kyiv	North	Centre	South
In their own home	58%	29%	71%	61%	71%	66%	53%
In rented accommodation	18%	32%	13%	16%	15%	15%	16%
With other people (relatives / friends)	14%	17%	12%	13%	9%	14%	17%
In a dormitory / communal apartment	3%	5%	2%	4%	1%	3%	3%
With strangers / unfamiliar people	3% ↓ -2%	7% ↓ -5%	1%	4%	1%	1% ↓ -2%	5%
In a hotel / hostel	2%	4%	0,4%	2%	0,4%	0,1%	4%
At a school / kindergarten / mobile accommodation for refugees	1%	2%		0,5%	0,3%		1%
Base: N=	2005	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

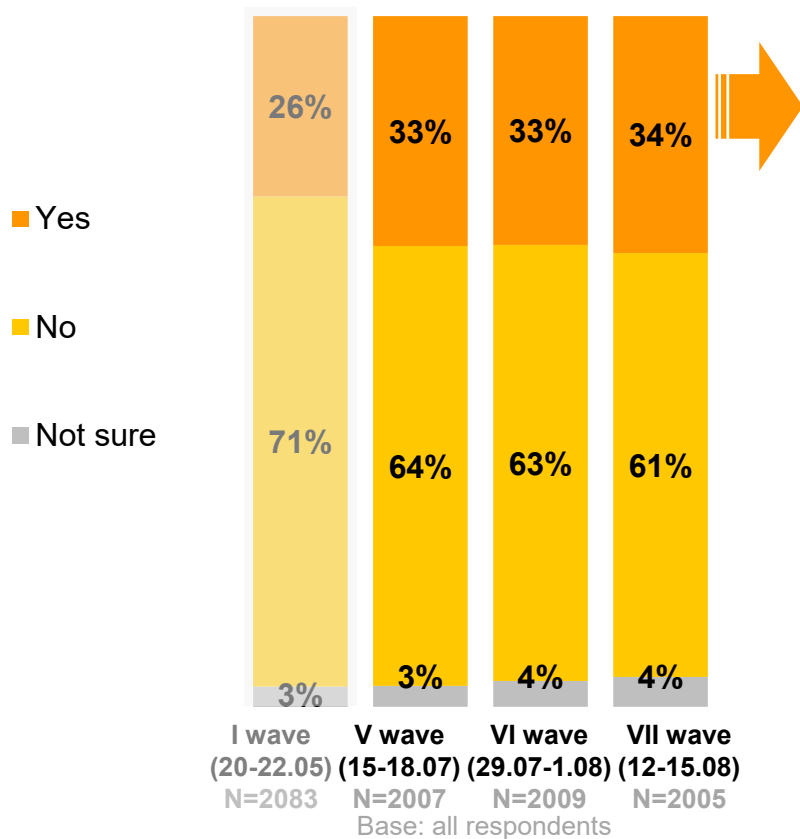


Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

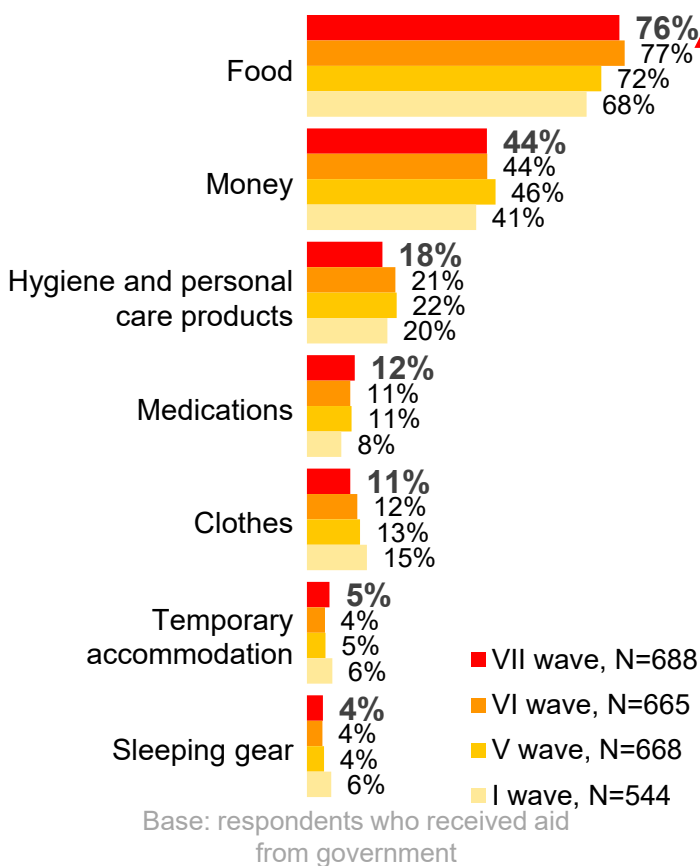
HUMANITARIAN AID FROM THE **UKRAINIAN** GOVERNMENT

In the seventh wave, the level of receiving humanitarian aid from the Ukrainian state remained without significant changes - 34%. The share of respondents who consider this assistance as sufficient has also not changed and is at 47%. When it comes to the form of assistance, the respondents most often received food (76%) and money (44%).

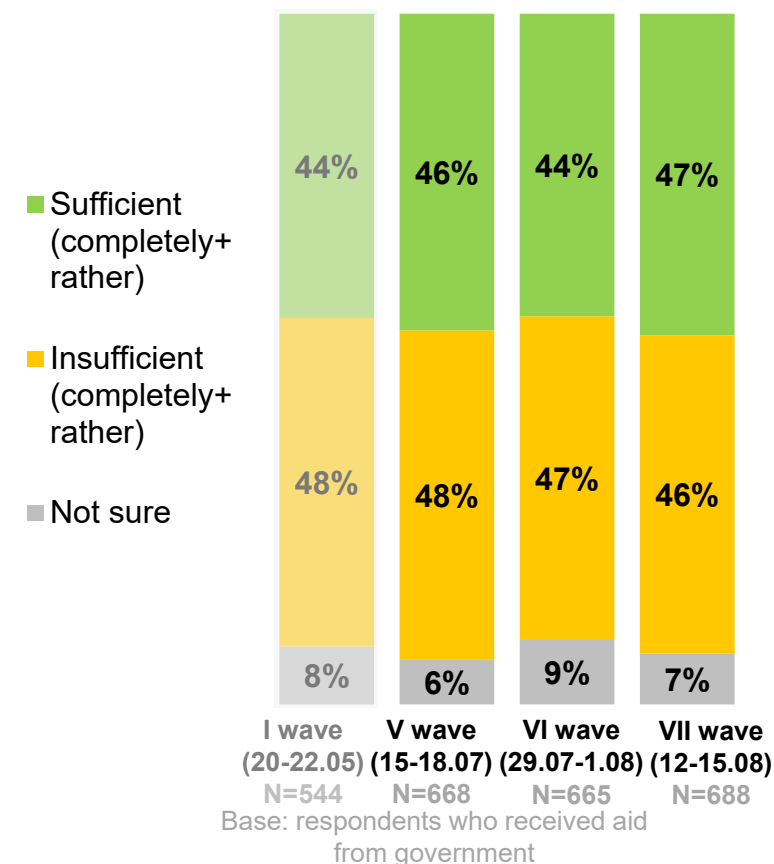
Reception of humanitarian aid from the government



Type of humanitarian aid



Sufficiency of the humanitarian aid



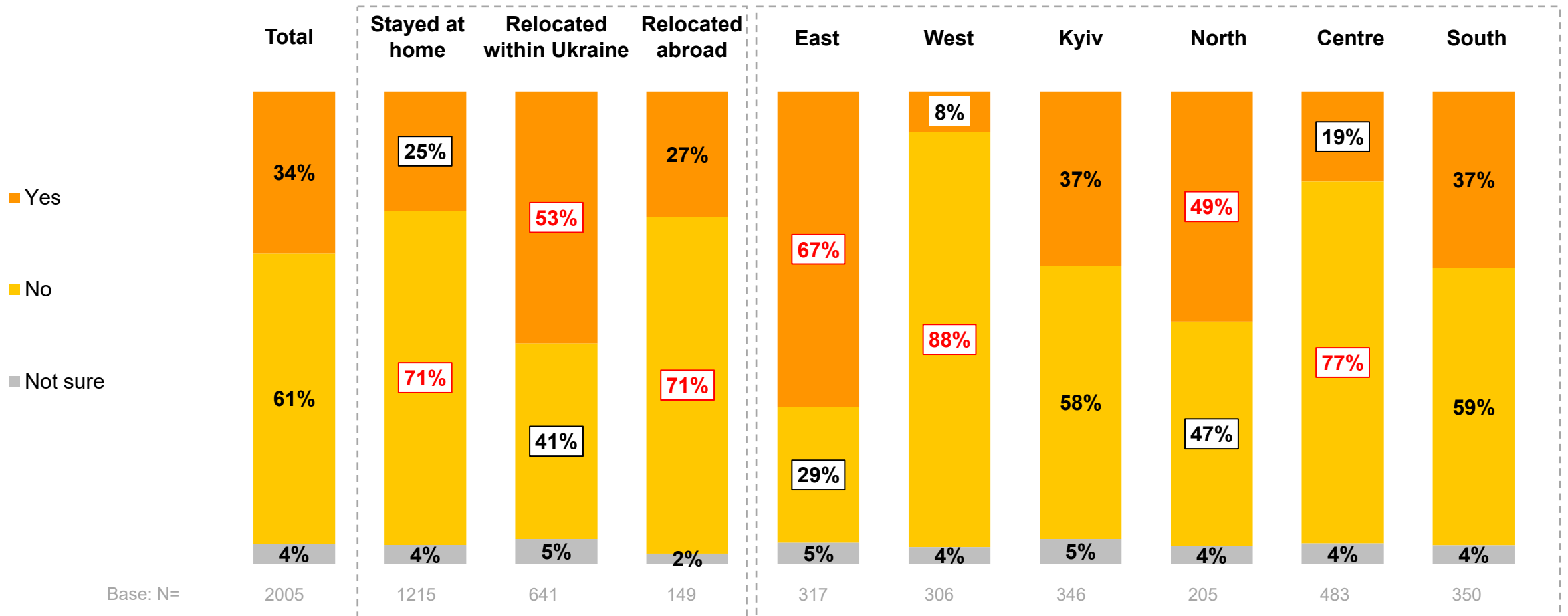
Have you or your family received humanitarian aid from the Ukrainian government?
 What kind of humanitarian aid did you or your family receive from the Ukrainian government?
 How would you assess the humanitarian aid provided to you or your family by the Ukrainian government?

↑↓ 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

The distribution of answers regarding receiving humanitarian aid from the Ukrainian state depending on migration and regional status remains at the level of the previous wave. Most often, humanitarian aid from the state was received by internally displaced persons and residents of the Eastern and Northern regions.



Base: all respondents
Have you or your family received humanitarian aid 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

TYPE OF HUMANITARIAN AID RECEIVED FROM THE **UKRAINIAN** GOVERNMENT

by migration status and region

Compared to the previous wave, among the residents of the North and those who stayed at home, there was recorded a decrease in the share of those who received aid from the state in the form of clothes (from 8% to 3% and from 18% to 8%, respectively). There are no other differences compared to the previous wave.

	Total	Stayed at home	Relocated within Ukraine	Relocated abroad	East	West	Kyiv	North	Centre	South
Food	76%	78%	76%	63%	83%	60%	68%	87%	66%	74%
Money	44%	35%	50%	62%	48%	46%	58%	21%	33%	48%
Hygiene and personal care products	18%	11%	23%	32%	21%	23%	22%	17%	14%	13%
Medications	12%	5%	17%	15%	10%	13%	7%	30%	6%	8%
Clothes	11%	3% ↓ -5%	17%	17%	14%	19%	11%	8% ↓ -10%	8%	6%
Temporary accommodation	5%	0,1%	10%	11%	9%	13%	4%	2%	3%	4%
Sleeping gear	4%	1%	5%	15%	7%	5%	5%		3%	1%
Base: N=	688	306	342	40	212	26*	128	100	92	131

* 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?

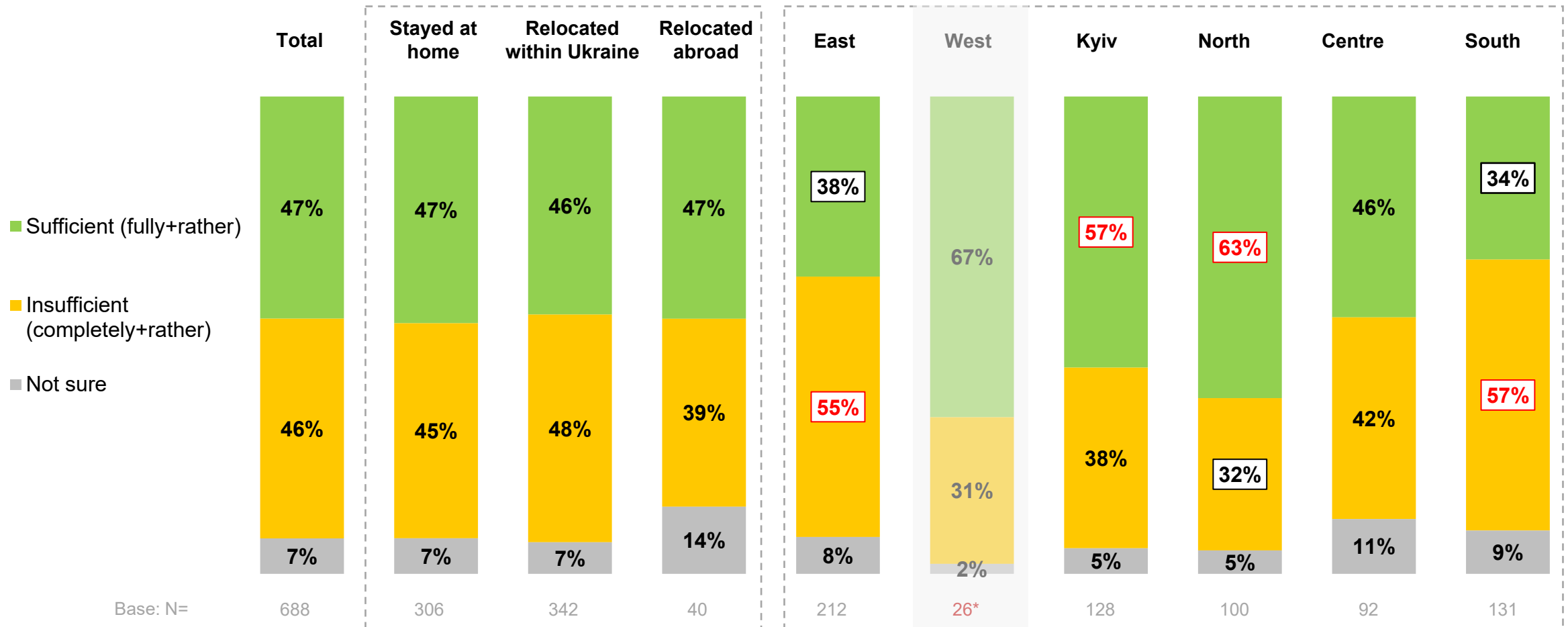
↑ Numbers that are statistically significantly higher / lower, compared to the previous wave of the study

▢ 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 significant changes in the assessment of the sufficiency of 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?

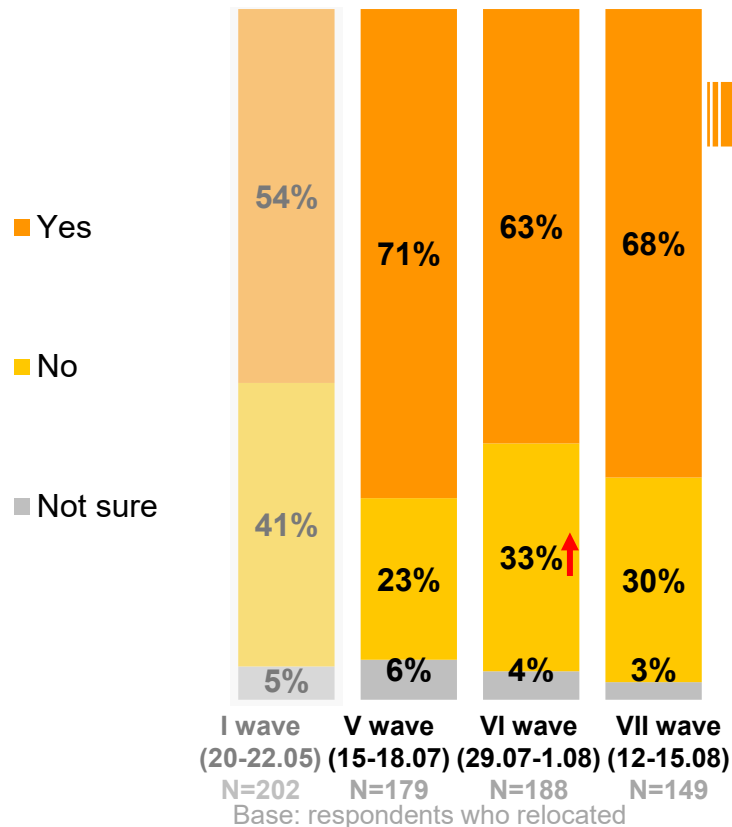
↓ ↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

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

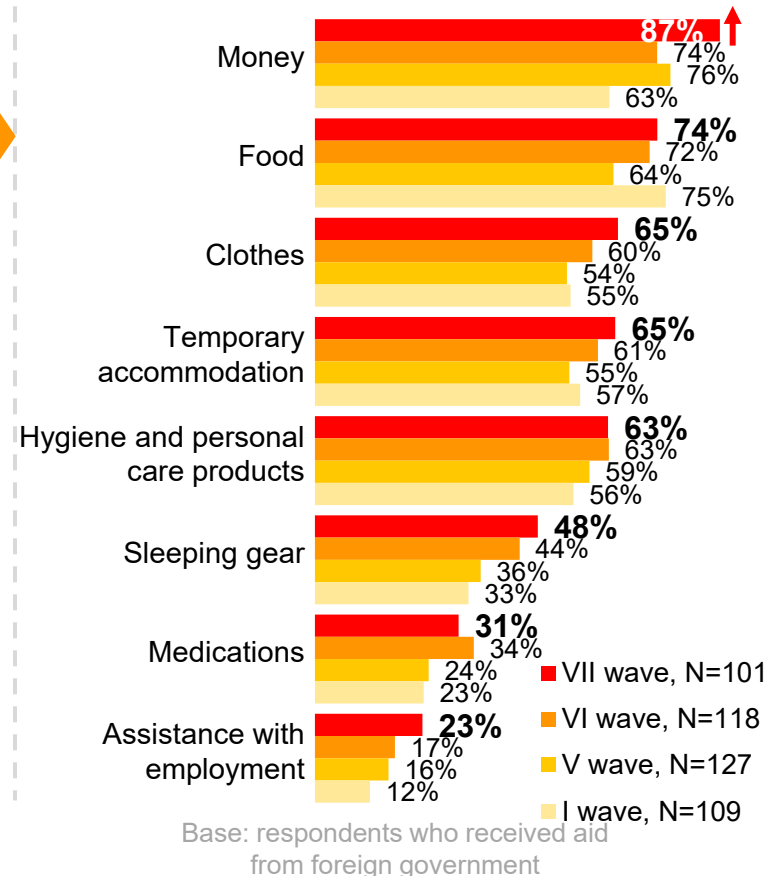
HUMANITARIAN AID FROM THE **FOREIGN** GOVERNMENT

Among those who relocated abroad, the share of respondents who received humanitarian aid from the government of the country in which they were located remained unchanged and is at 68%. Among those who received it, 79% evaluated it as sufficient (at the level of the previous wave). In general, more than half of the respondents indicated receiving money (87%, the indicator increased from 74%), food (74%), clothes (65%), temporary housing (65%) and hygiene products (63%).

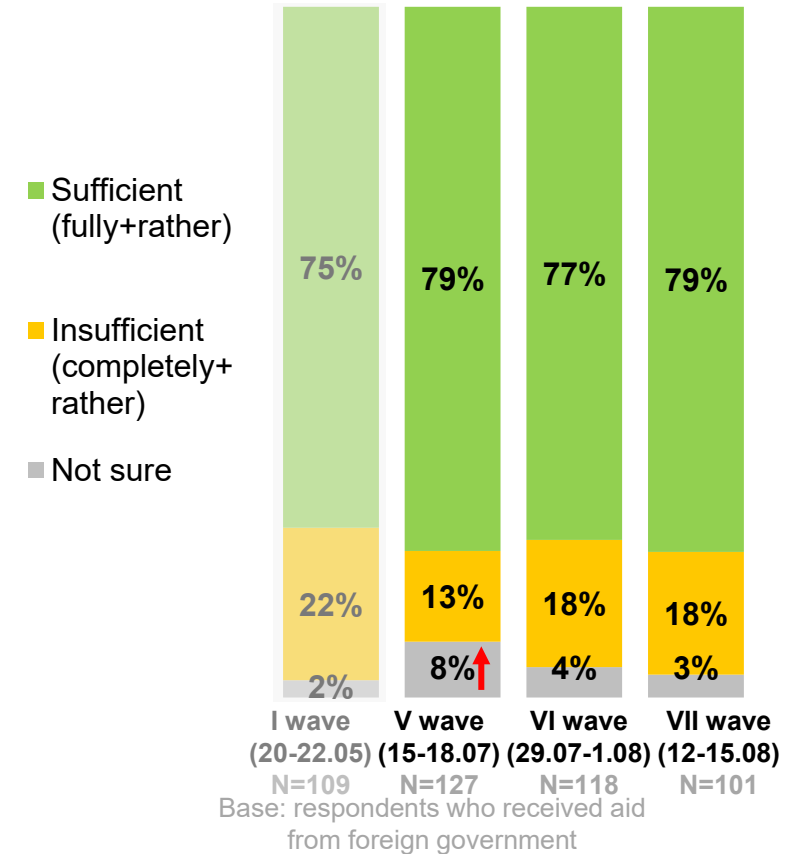
Reception of humanitarian aid from the government



Type of humanitarian aid



Sufficiency of the humanitarian aid



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?

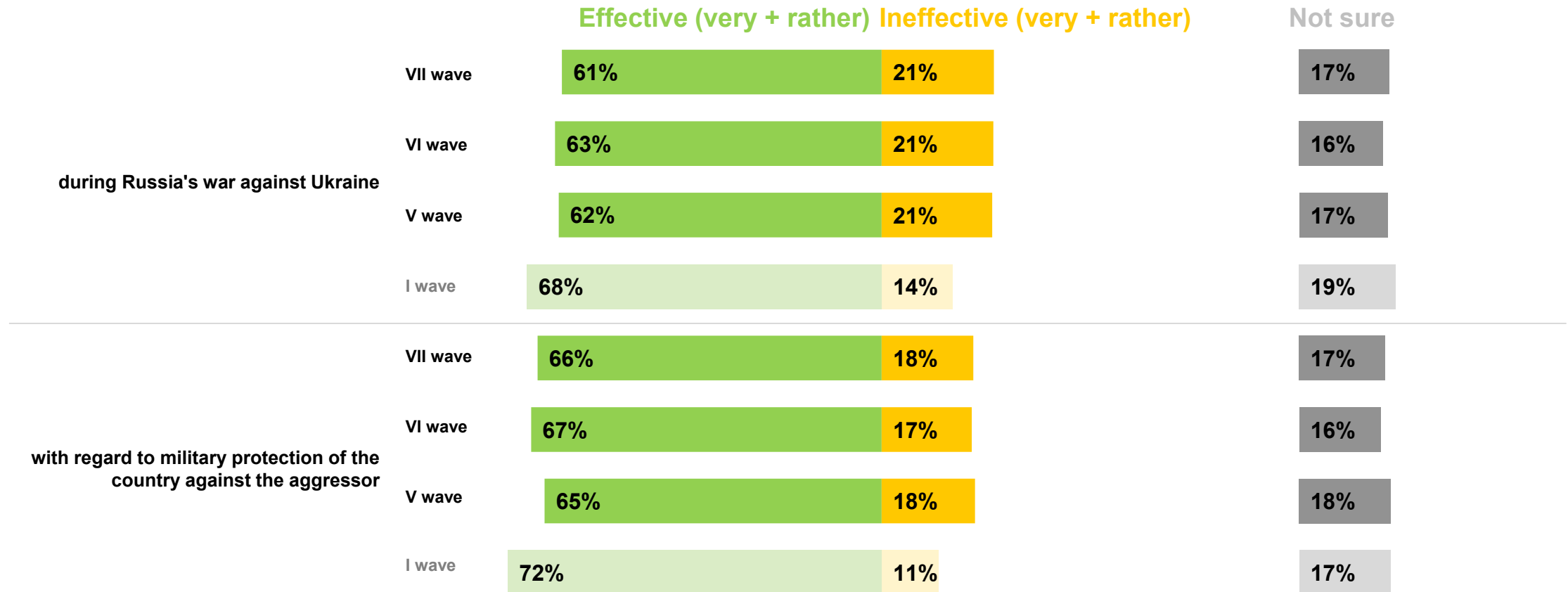
↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

PERCEPTION OF THE FULL-SCALE WAR WITH RUSSIA




EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES...

In the seventh wave, there were no significant changes in the evaluation of the effectiveness of the actions of the Ukrainian authorities both since the beginning of the war in general and with regard to military protection: more than half of respondents consider them as effective (61% and 66%, respectively). Young people aged 18-24 are significantly less likely to consider the government's actions as effective with regard to protection of the country from an aggressor.



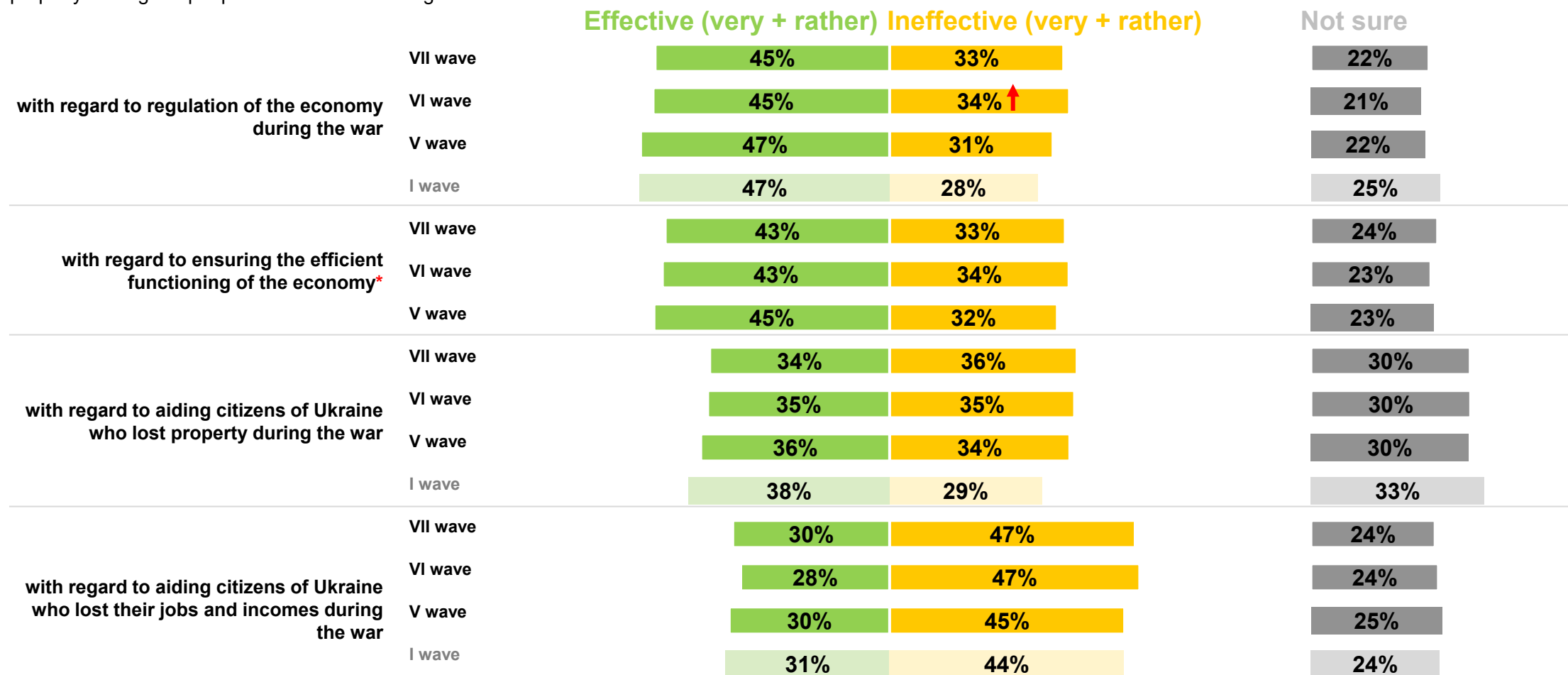
Base: all respondents; I wave - N = 2083, V wave – N = 2007, VI wave – N = 2009, VII wave – N = 2005.

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?

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

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES...

Evaluation of the actions of the Ukrainian authorities in the spheres of economy and assistance to citizens in the 7th wave remained without significant changes, compared to the 6th. Among residents of Kyiv, there is a growing evaluation of the effectiveness of assistance to citizens who lost property and income during the war. Also, there is a more positive assessment of the actions of the authorities in aiding those who lost their property among the people from the Eastern region.



Base: all respondents; I wave - N = 2083, V wave – N = 2007, VI wave – N = 2009, VII wave – N = 2005.

How effective do you consider the actions of the Ukrainian authorities: 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

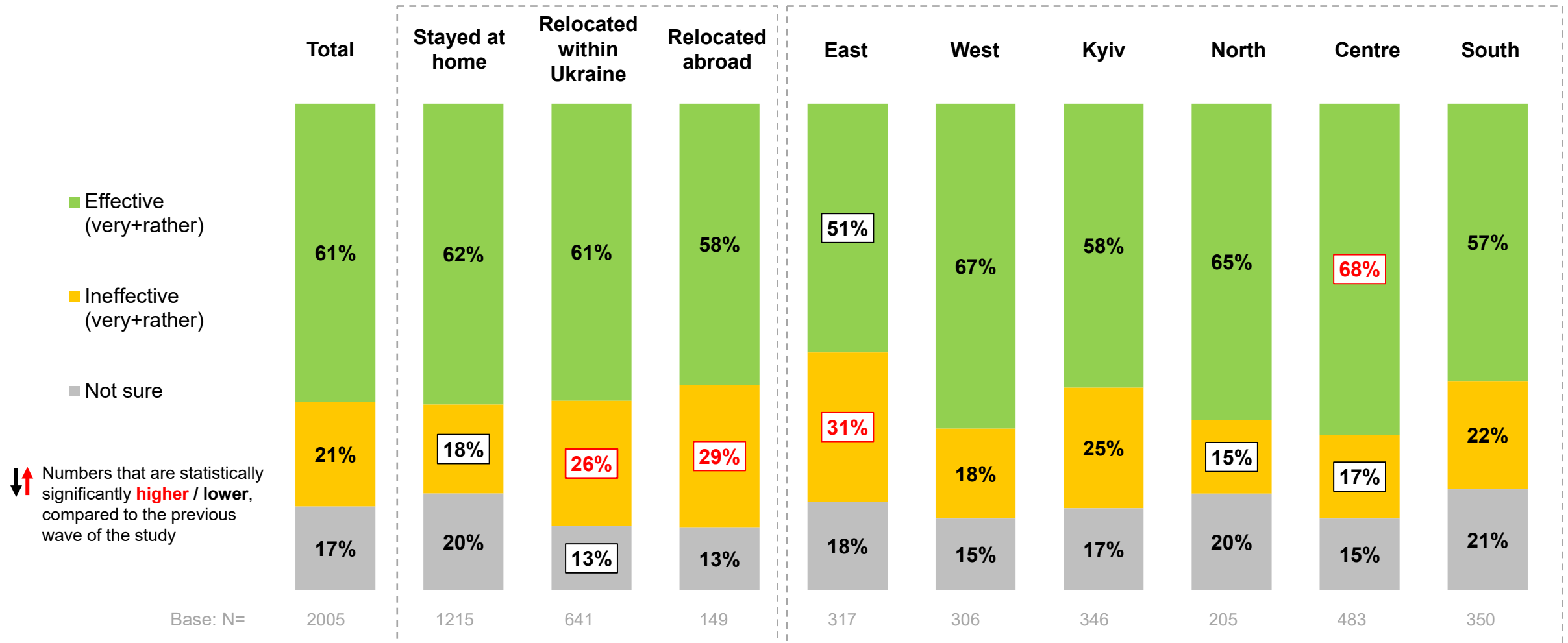
aiding citizens of Ukraine who lost their jobs and incomes during the war? * This question was included in the questionnaire in the fifth wave

↑↓ 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



EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES ^{Gradus} during Russia's war against Ukraine by age



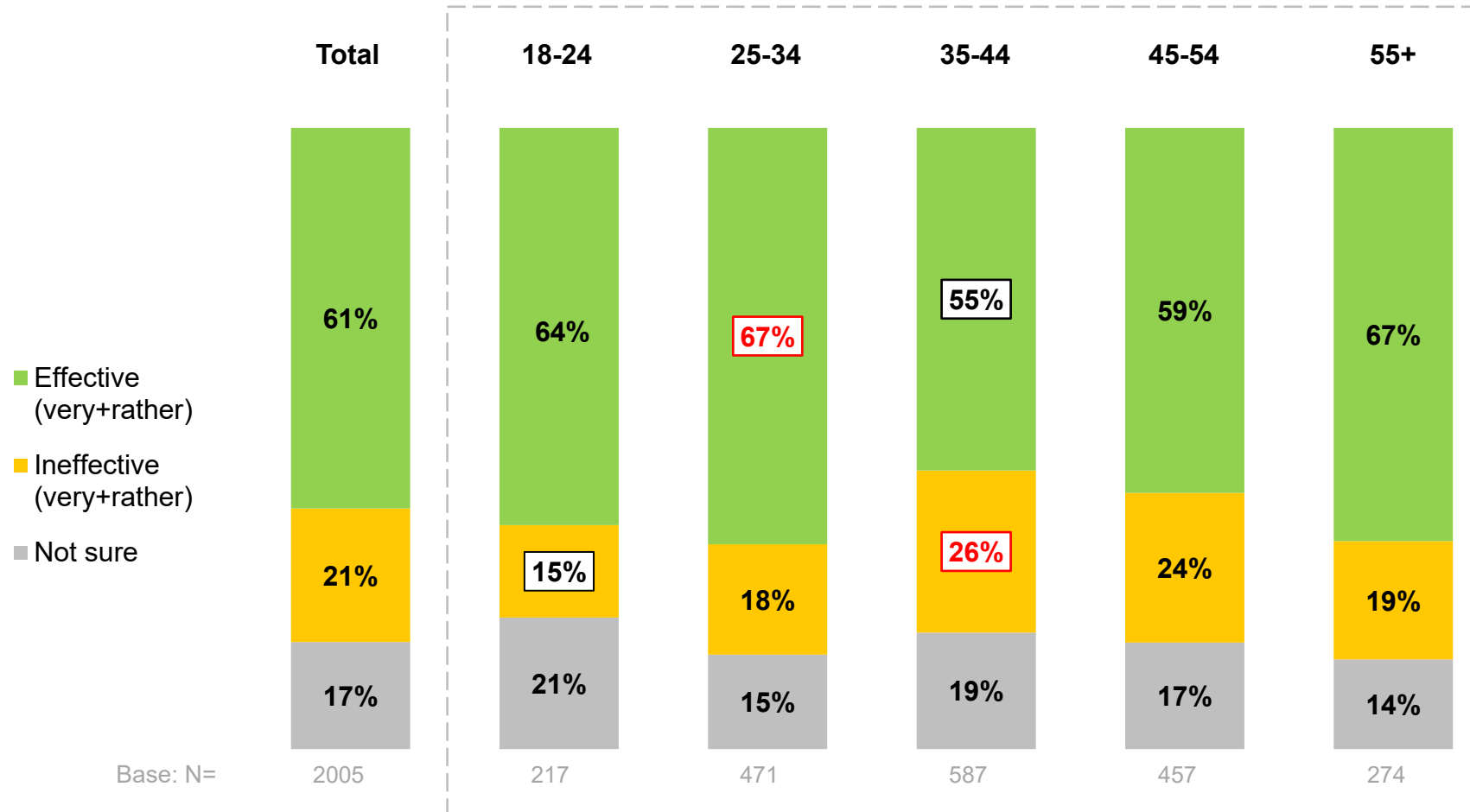
Centre for
Economic
Recovery



Advanter



MOVING FORWARD
TOGETHER



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

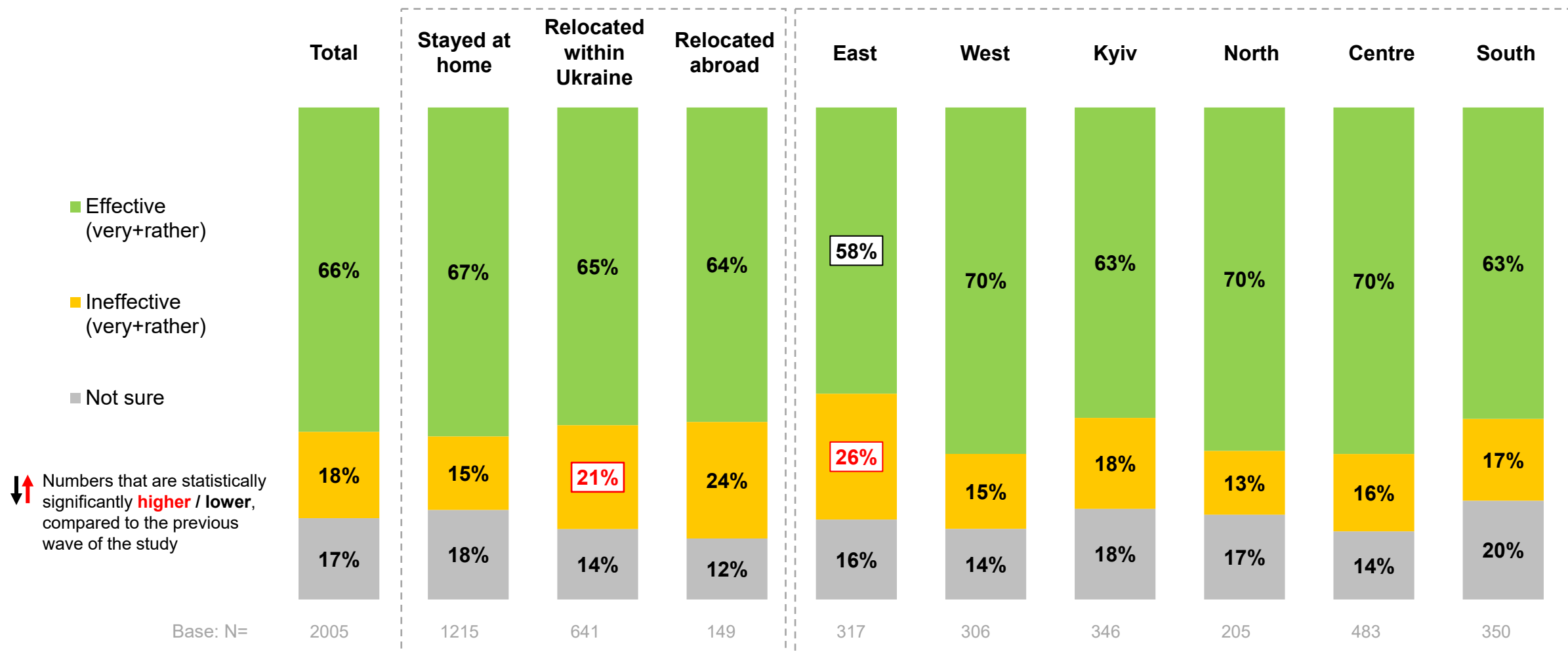
□ Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

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**



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, 44 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



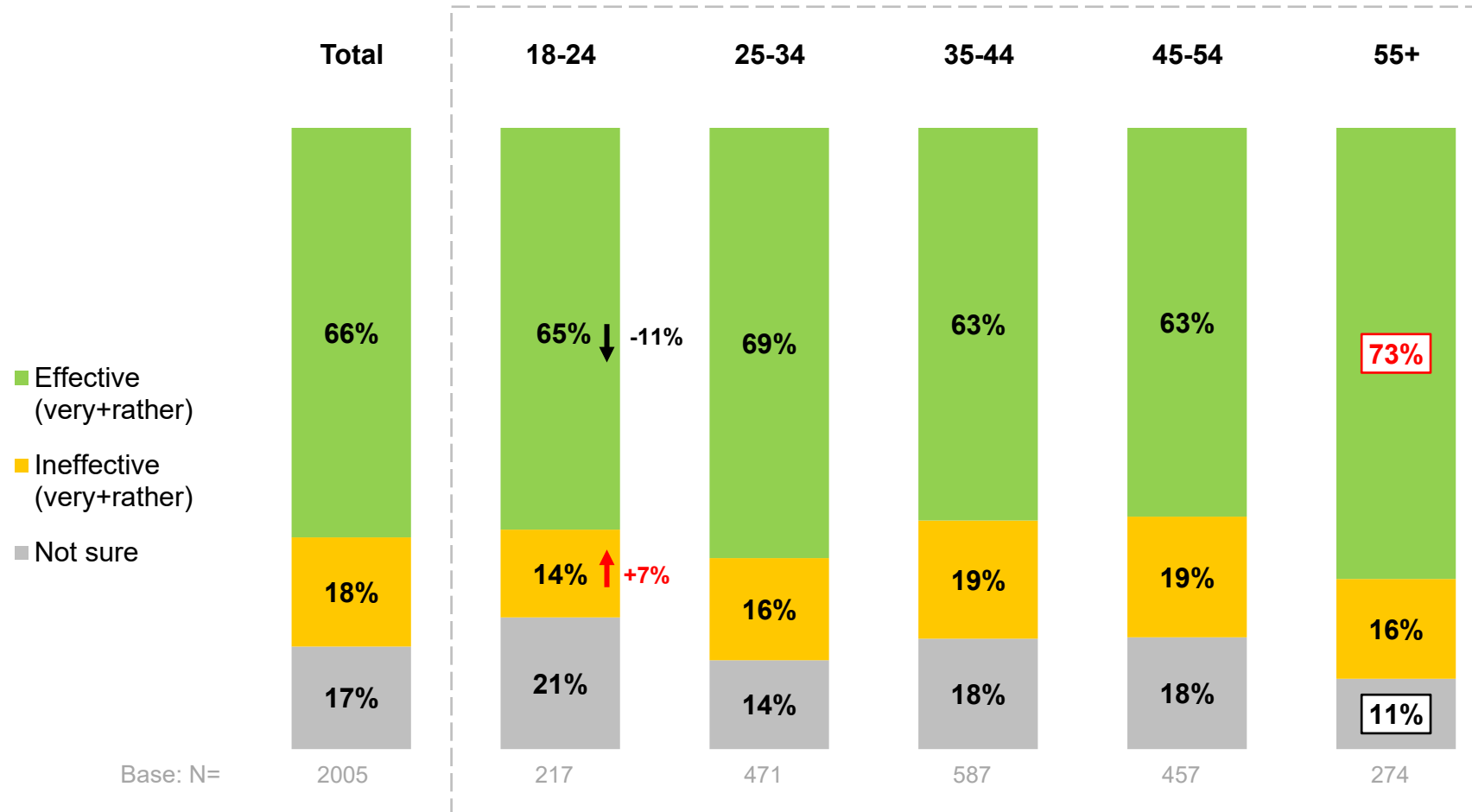
Centre for
Economic
Recovery



Advanter



MOVING FORWARD
TOGETHER



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?

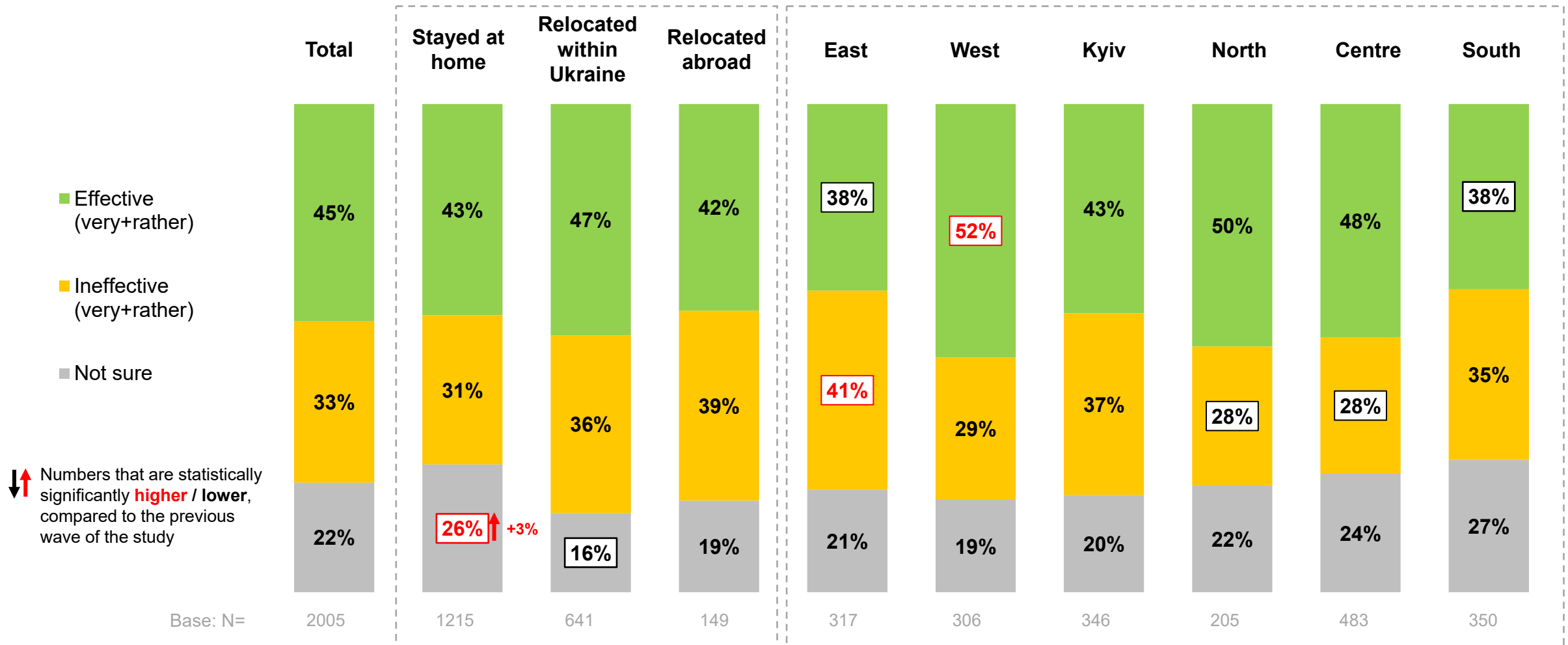
↓ ↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

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

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, 46 compared to the sample as a whole

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

with regard to **regulation of the economy** during the war

by age



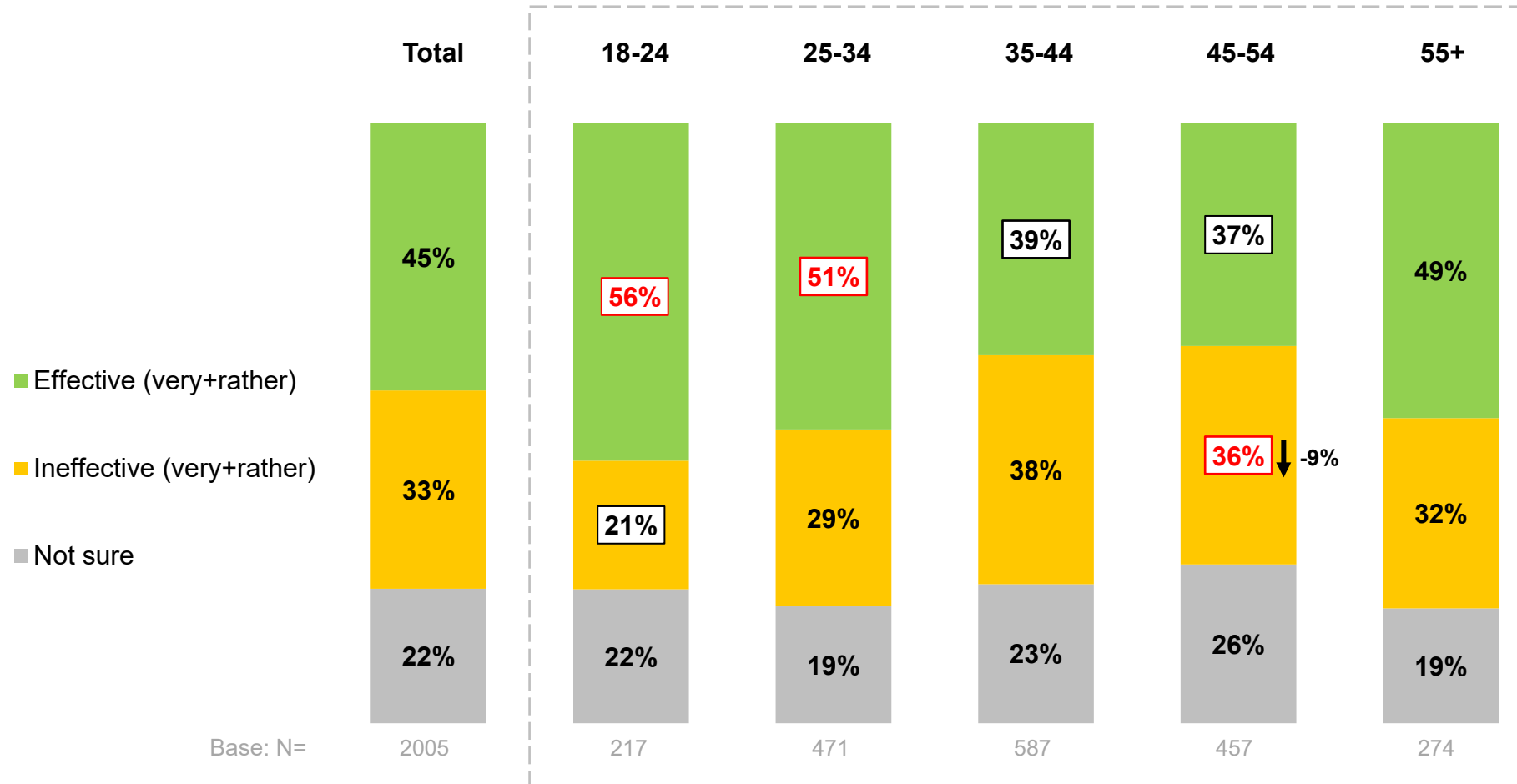
Centre for
Economic
Recovery



Advanter



MOVING FORWARD
TOGETHER



Base: all respondents

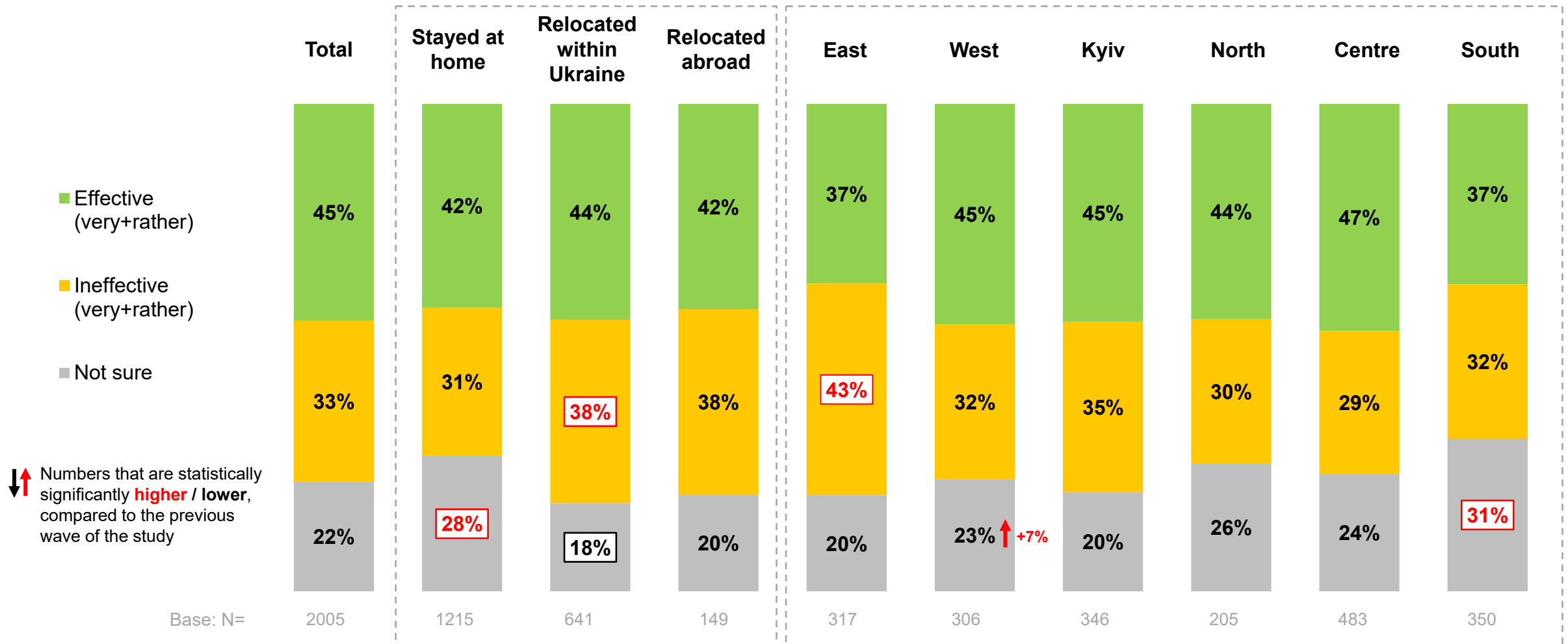
How effective do you consider the actions of the Ukrainian authorities with regard to regulation of the economy during the war?

↑ ↓ Numbers that are statistically significantly **higher** / **lower**, 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

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, 48 compared to the sample as a whole

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

with regard to **ensuring the efficient functioning of the economy**
by age



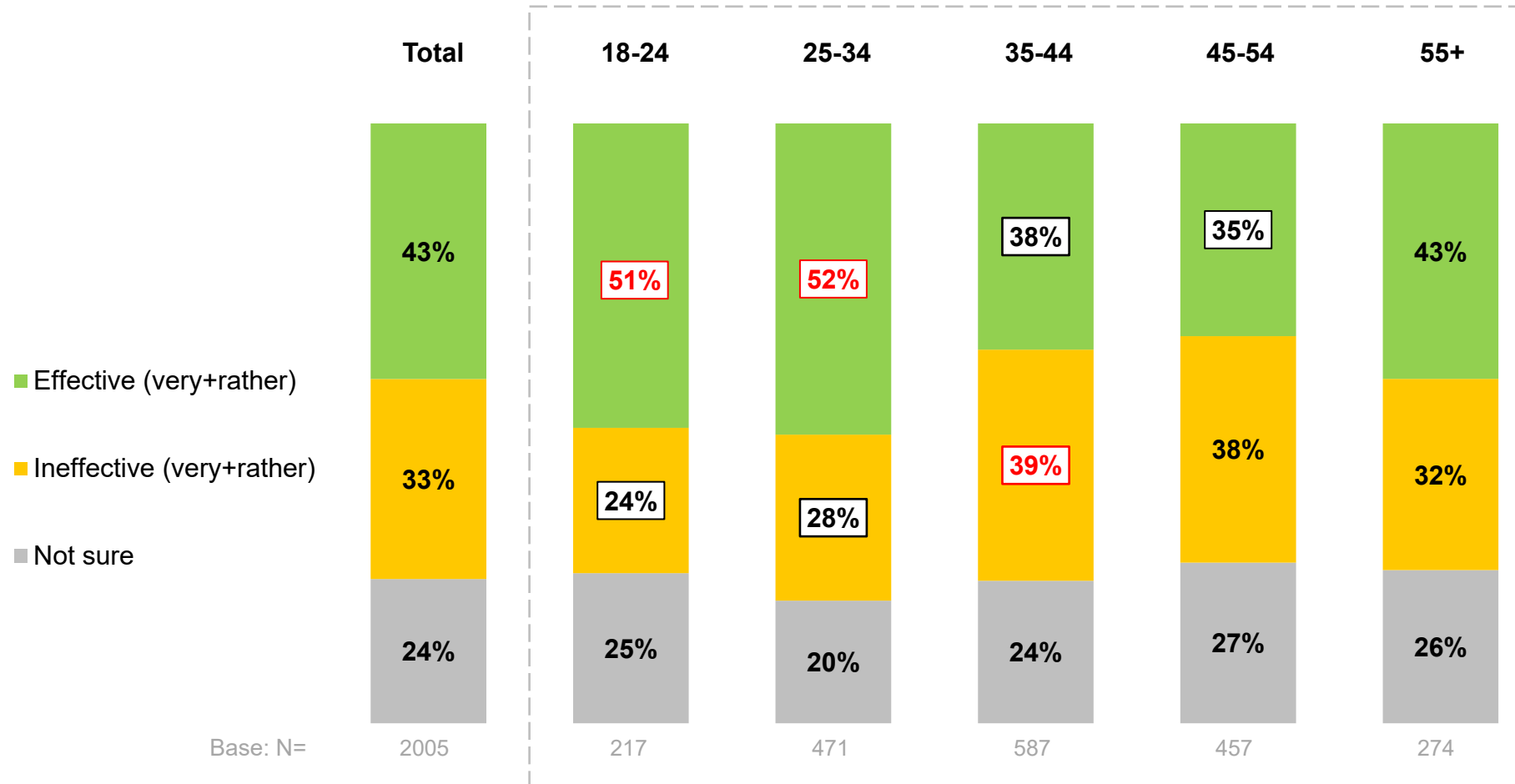
Centre for
Economic
Recovery



Advanter



MOVING FORWARD
TOGETHER



Base: all respondents

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

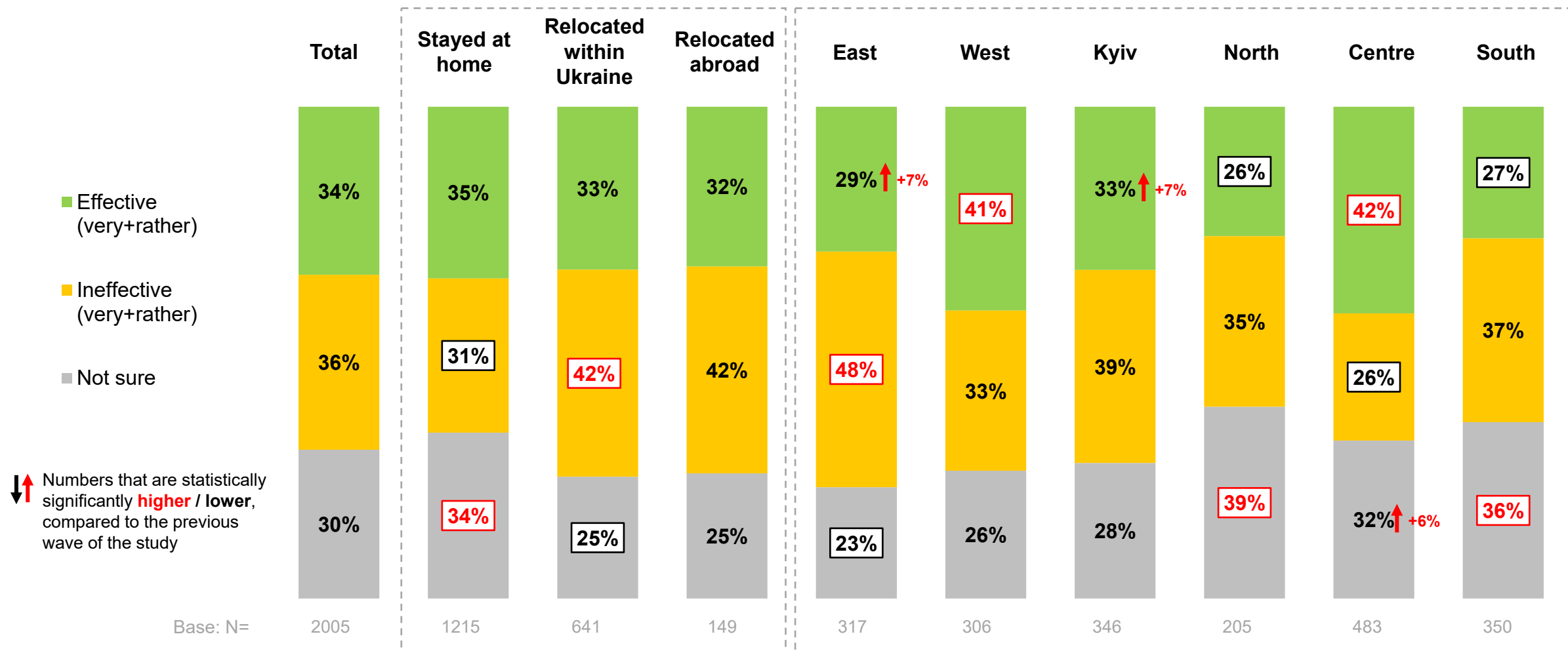
↓ ↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

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

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?

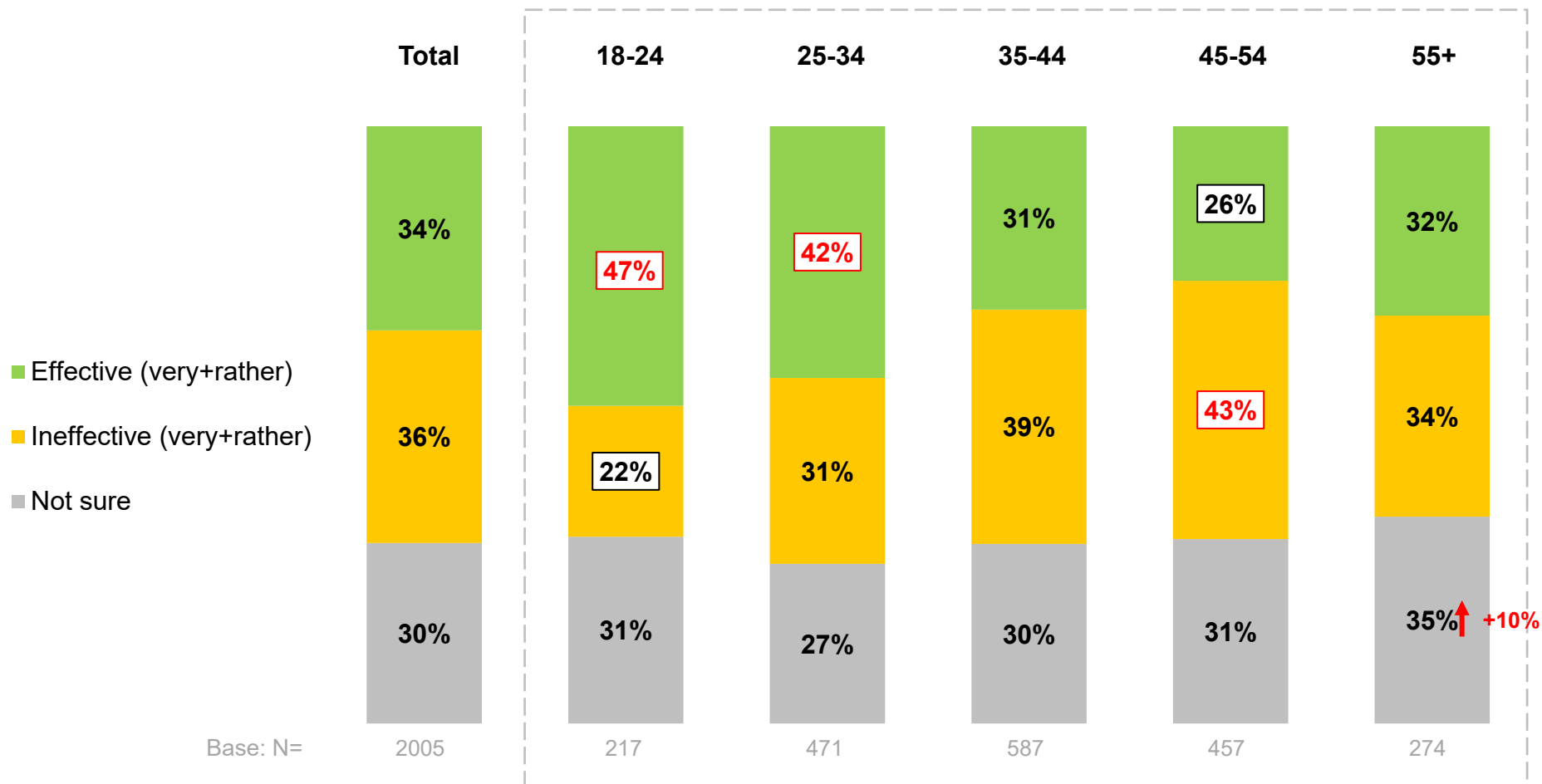
Numbers that are statistically significantly **higher** / **lower** for a group, 50 compared to the sample as a whole

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

with regard to **aiding citizens** of Ukraine **who lost property**

during the war

by age



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?

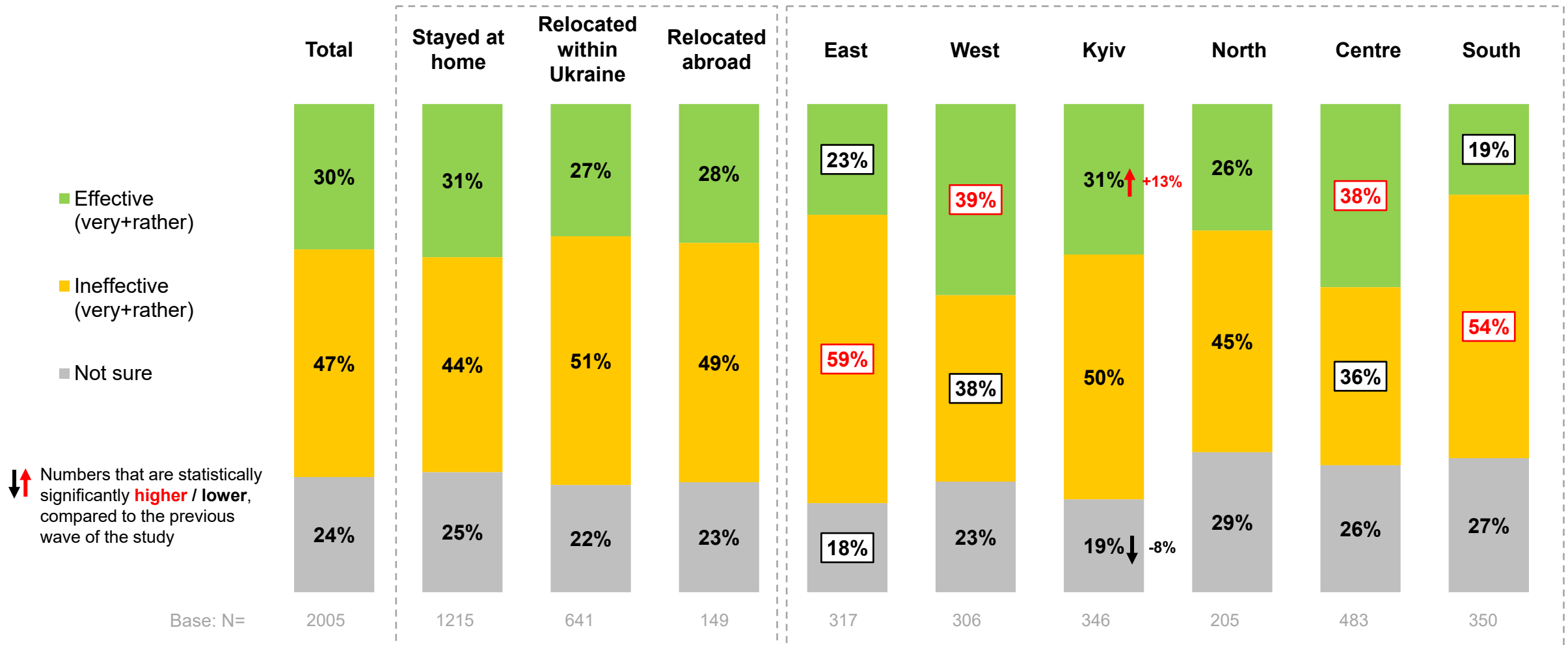
↓ ↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

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

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES


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

by migration status and region



Base: all respondents

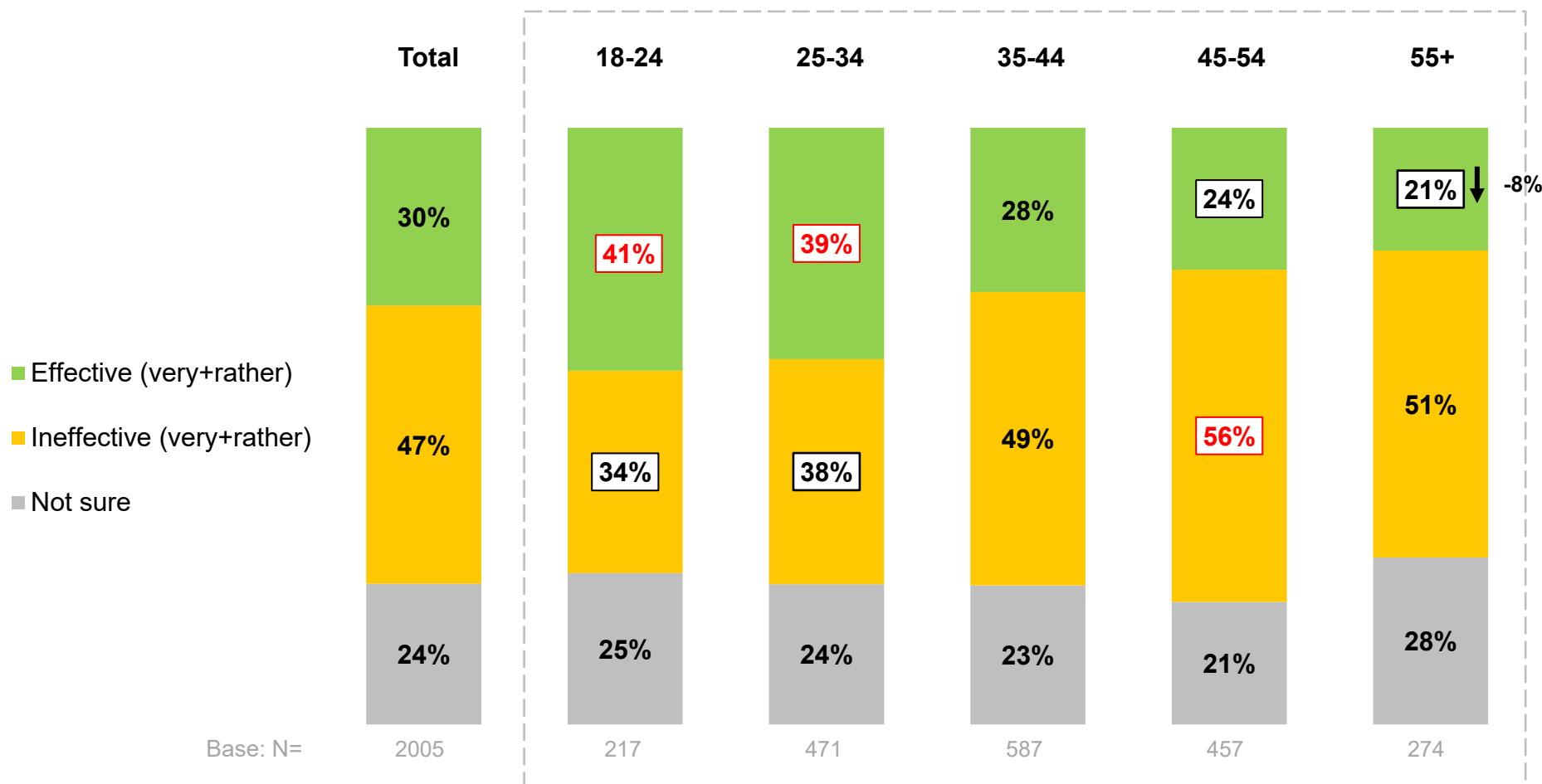
How effective do you consider the actions of the Ukrainian authorities with regard to aiding citizens of Ukraine who lost their job and income during the war?

 Numbers that are statistically significantly **higher** / **lower** for a group, 52 compared to the sample as a whole

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

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

by age



Base: all respondents

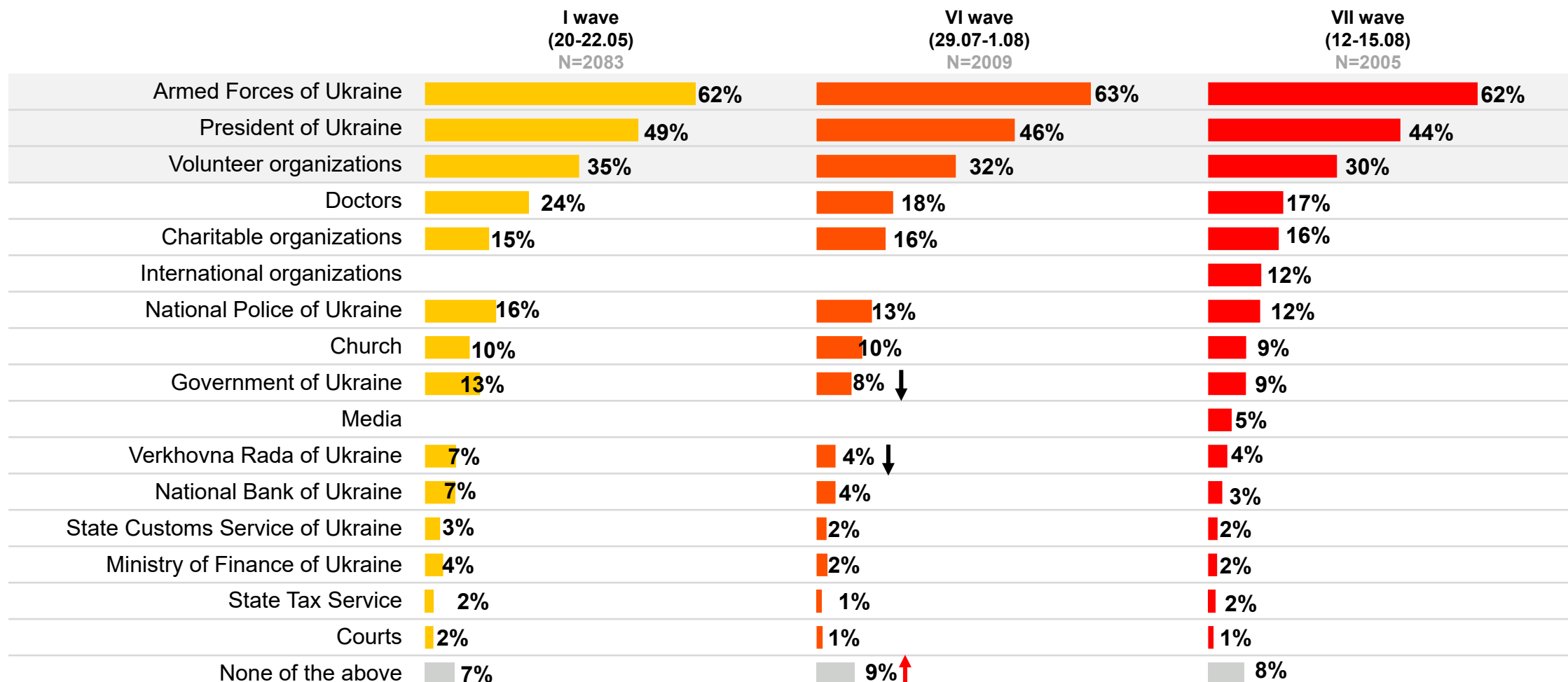
How effective do you consider the actions of the Ukrainian authorities with regard to aiding citizens of Ukraine who lost their job and income during the war?

↑↓ Numbers that are statistically significantly **higher** / **lower**, 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

TRUST IN INSTITUTIONS

The respondents expressed the highest percentage of trust in the Armed Forces of Ukraine (62%), the President of Ukraine (44%) and volunteer organizations (30%). There are no significant differences compared to the previous wave.



*were added in 7th wave of survey

Base: all respondents

Which of the following institutions do you trust?

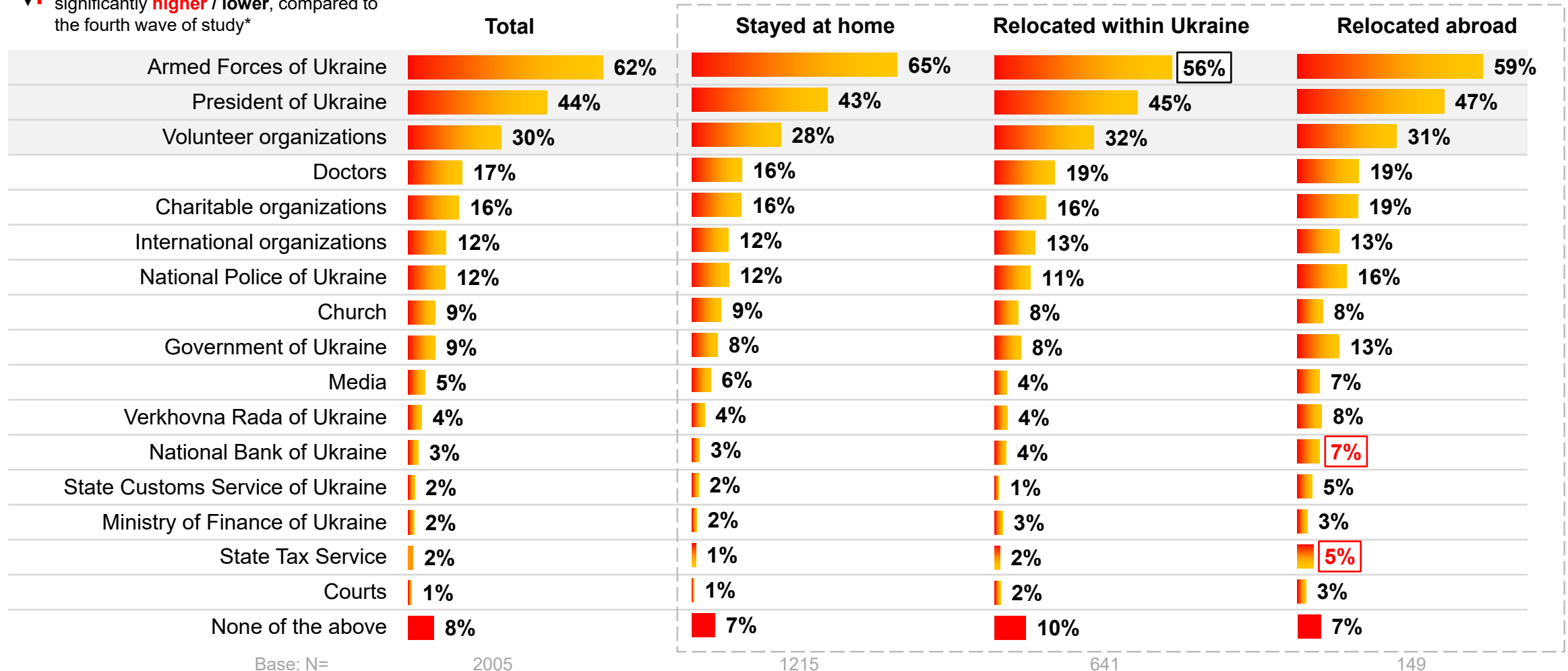
↓ ↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of study; figures of VI wave are compared to the figures of IV wave**

TRUST IN INSTITUTIONS

by migration status

Internal migrants have a lower level of trust in the Armed Forces of Ukraine, compared to the sample as a whole. At the same time, foreign migrants significantly more trust the National Bank of Ukraine and the State Tax Service of Ukraine.

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



Base: all respondents
Which of the following institutions do you trust?

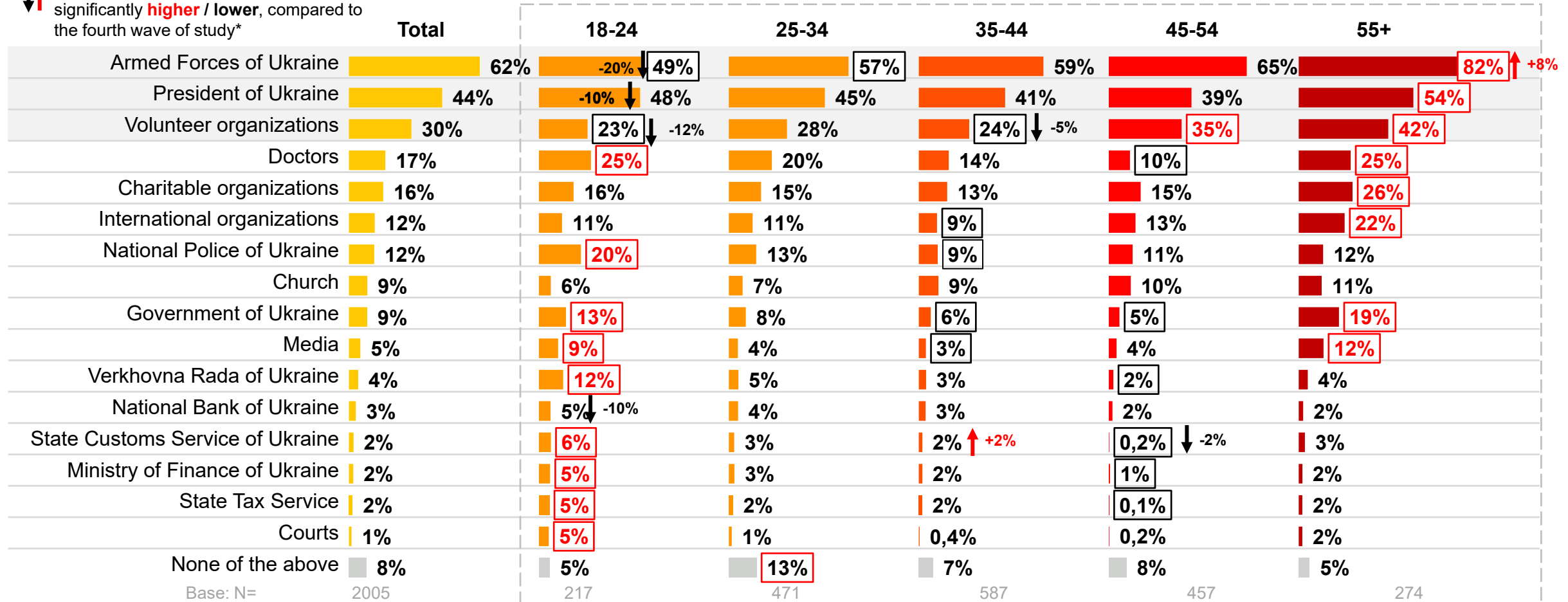
Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

TRUST IN INSTITUTIONS

by age

Respondents aged 18-24 and 55+ trust a large number of institutions significantly more than other age groups. Compared to the previous wave, the level of trust in the Armed Forces of Ukraine, the President, volunteer organizations, and the National Bank decreased among young people aged 18-24, and at the same time the level of trust in the Armed Forces of Ukraine increased among the 55+ group.

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



Base: all respondents

Which of the following institutions do you trust?

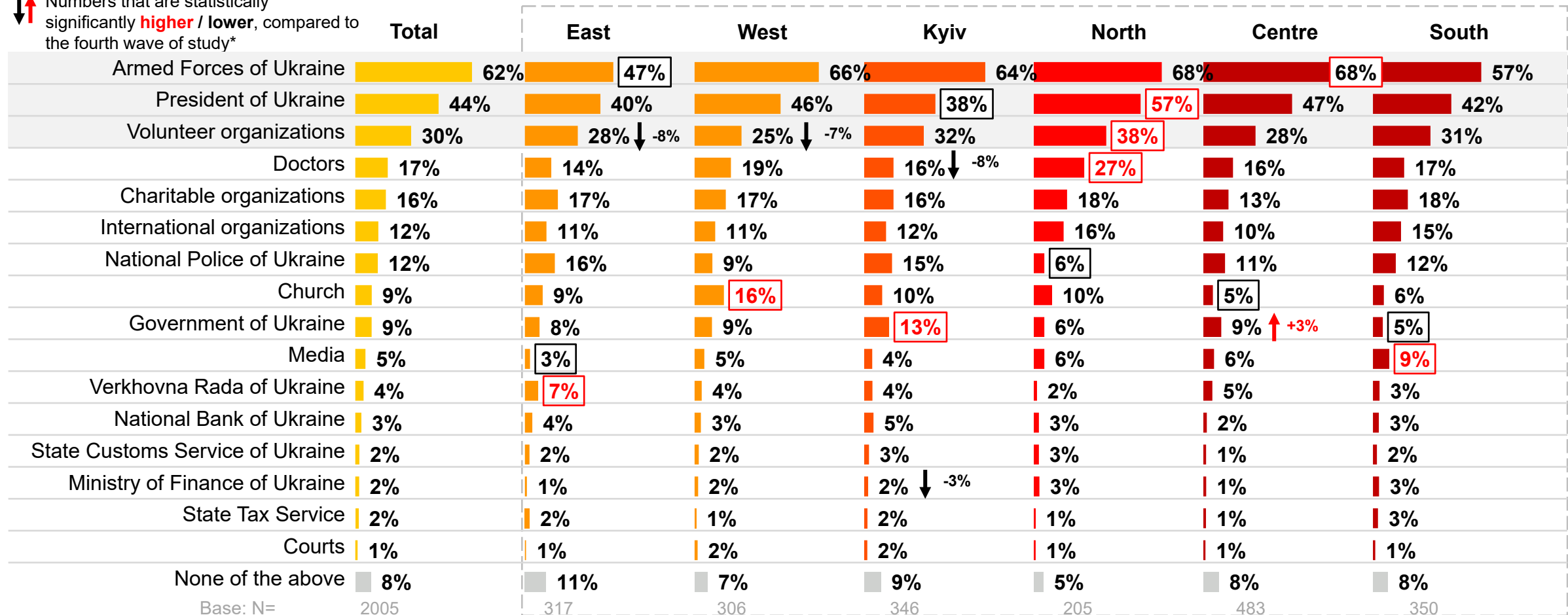
Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole 56

TRUST IN INSTITUTIONS

by region

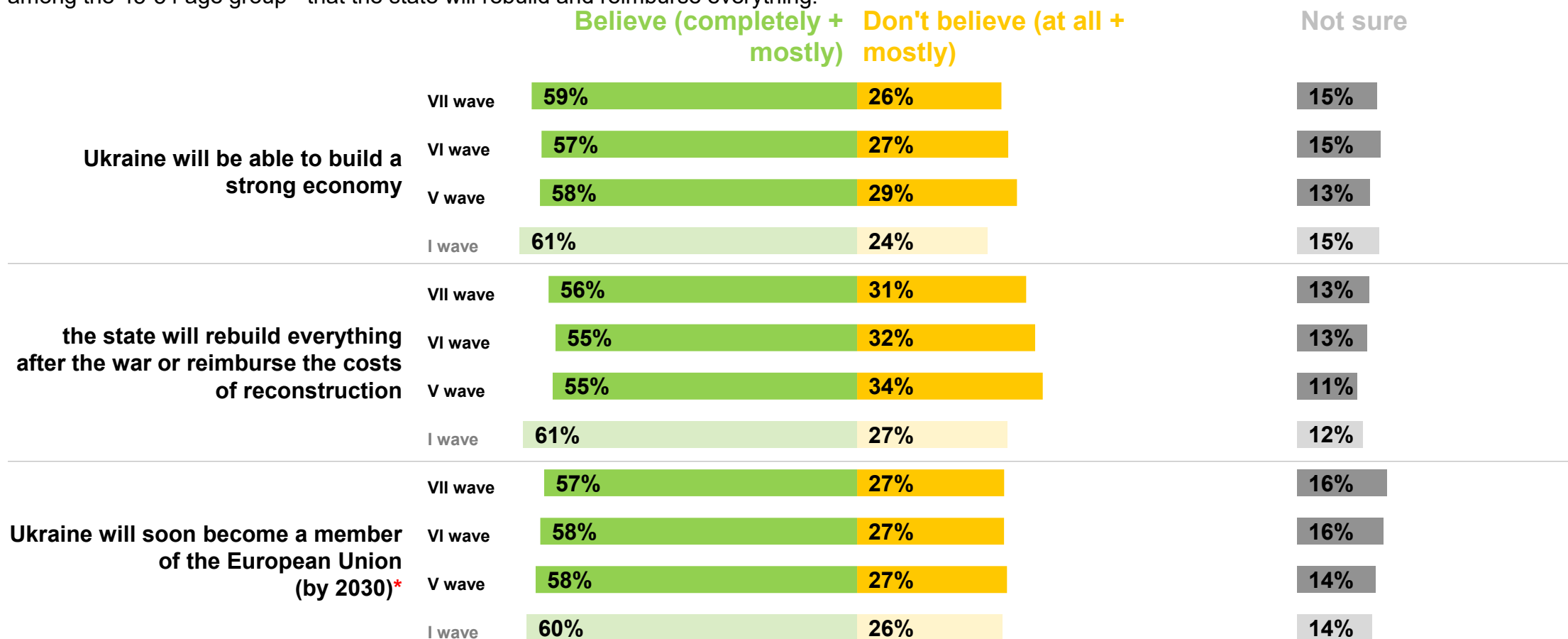
Residents of the Eastern region still express the lowest level of trust in the Armed Forces of Ukraine (47%), while residents of the Center have the highest level of trust (68%). Residents of the Northern region significantly more trust the President of Ukraine, volunteer organizations and doctors, but at the same time significantly less trust the police, compared to other regions. Compared to the previous wave, among residents of the East and West, the level of trust in volunteer organizations has decreased, while among the residents of Kyiv - in doctors and in the Ministry of Finance of Ukraine. Trust in the Government of Ukraine is growing in the Central region.

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



UKRAINIANS'* BELIEF THAT...

The belief of Ukrainians* that the state will be able to build a strong economy, rebuild everything after the war or reimburse the costs for reconstruction and become a member of the EU in the near future remains unchanged, at the level of 56-59%. Compared to the previous wave, there was an increase in the belief in a strong economy among the 55+ age group, while among the 45-54 age group - that the state will rebuild and reimburse everything.



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

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

Base: all respondents; I wave - N = 2083, V wave - N = 2007, VI wave - N = 2009, VII wave - N = 2005.

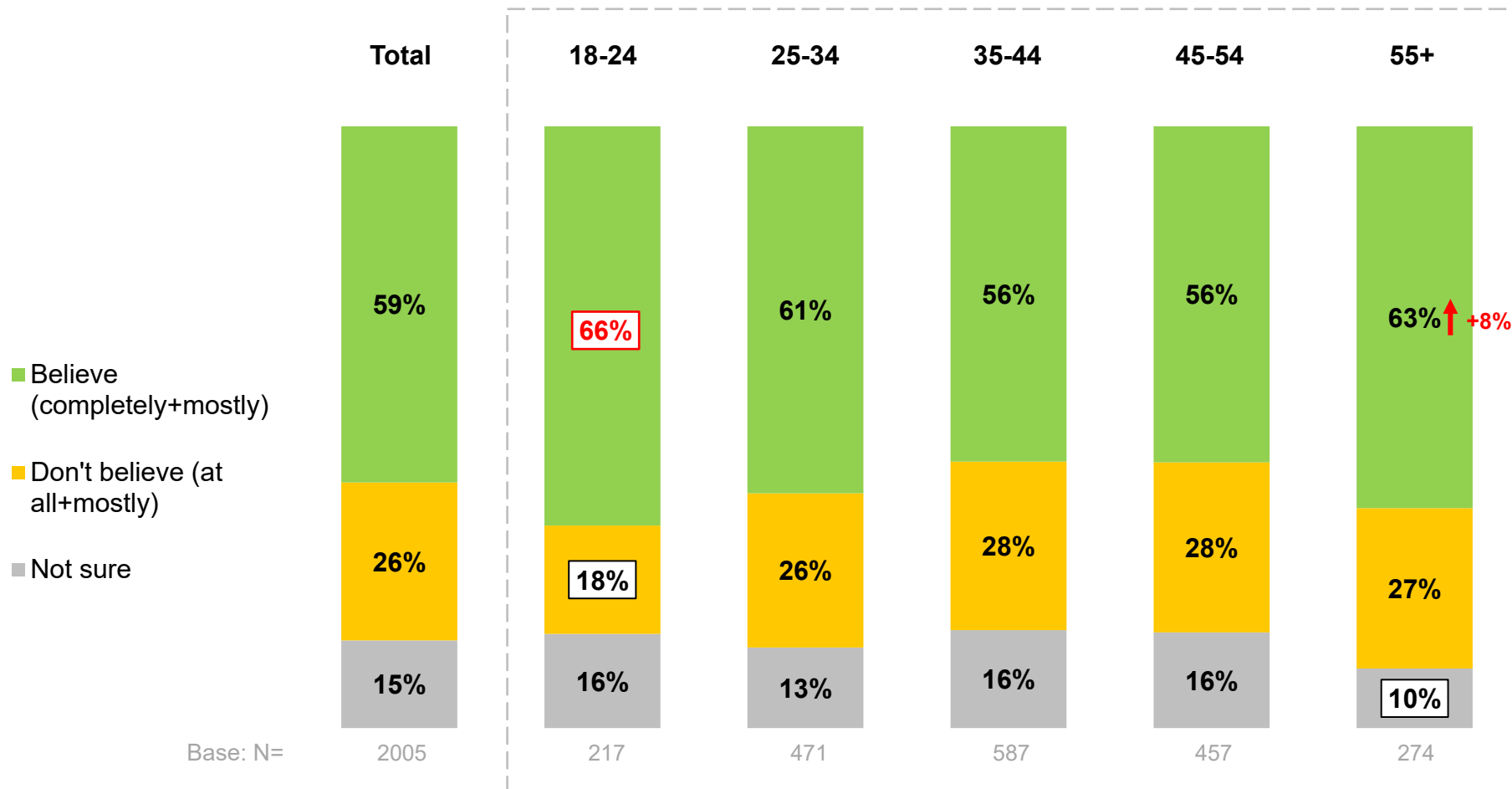
Do you believe that : Ukraine will be able to build a strong economy / the state will rebuild everything after the war or reimburse the costs of reconstruction / Ukraine will soon become a member of the European Union (by 2030)?

↓↑ 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+ who use smartphones.

Base: all respondents;

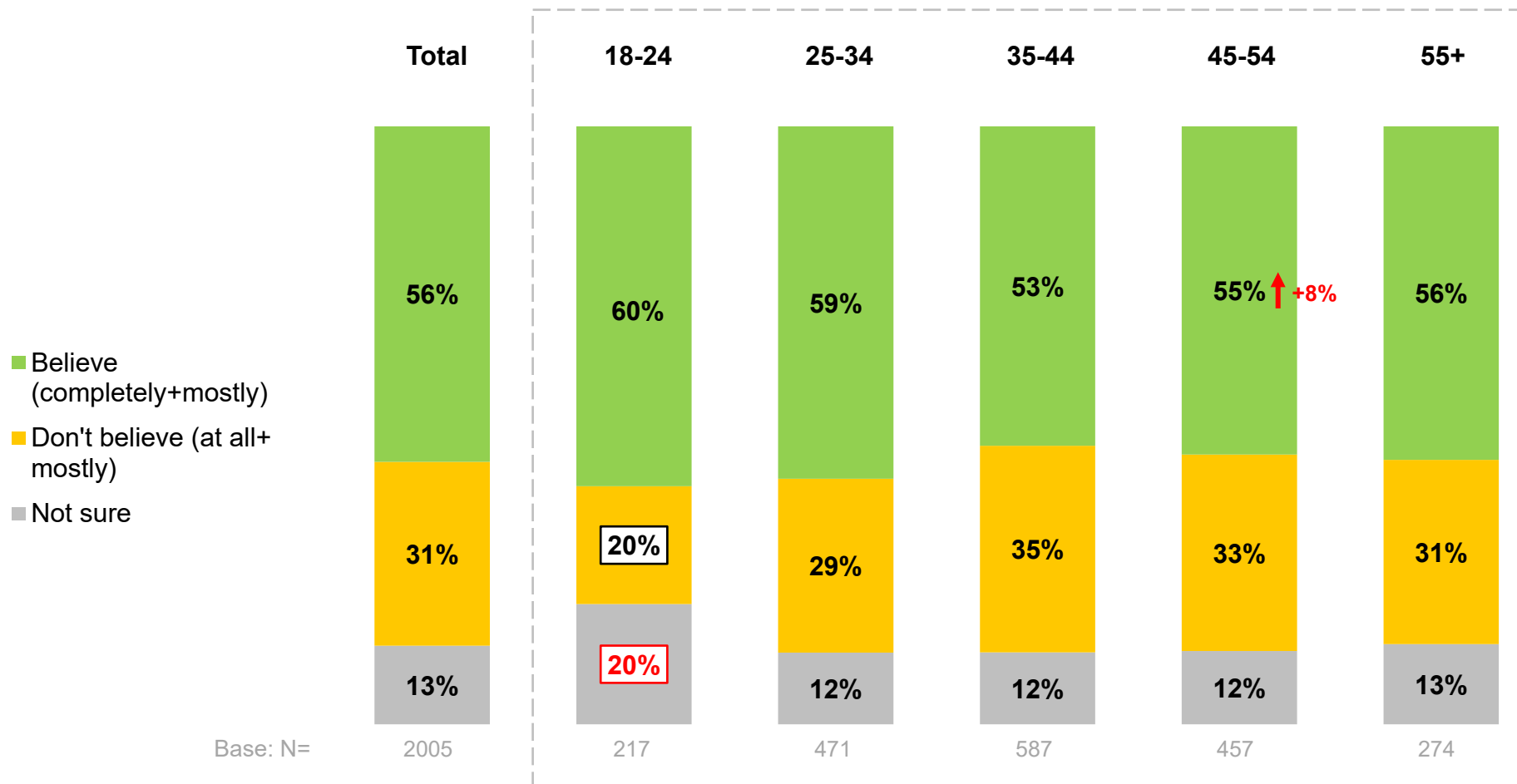
Do you believe that Ukraine will be able to build a strong economy?

↑↓ 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+ who use smartphones.

Base: all respondents;

Do you believe that the state will rebuild everything after the war or reimburse the costs of reconstruction?

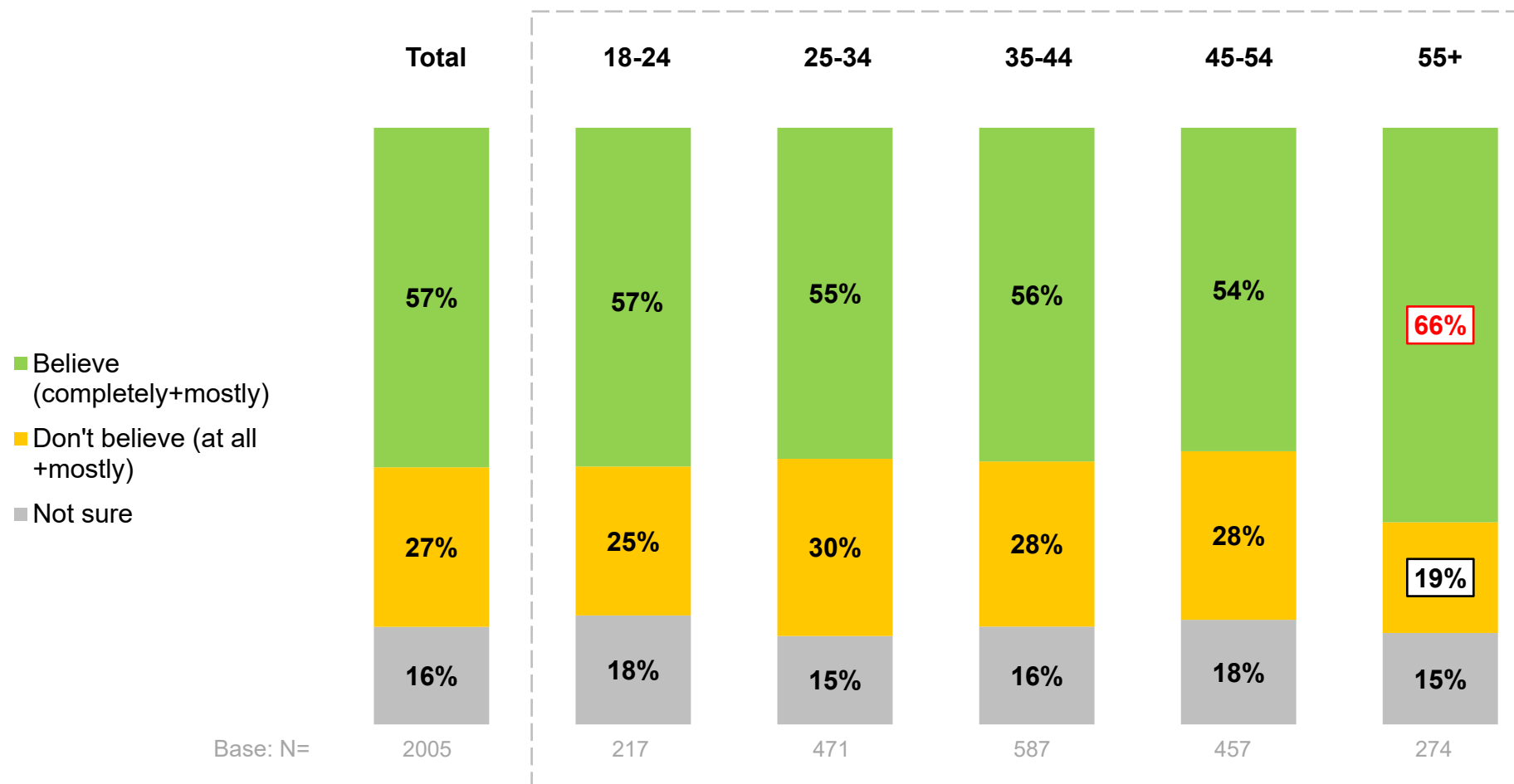
↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

□ 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 (by 2030)*

by age



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

Base: all respondents

Do you believe that Ukraine will soon become a member of the European Union (by 2030)?

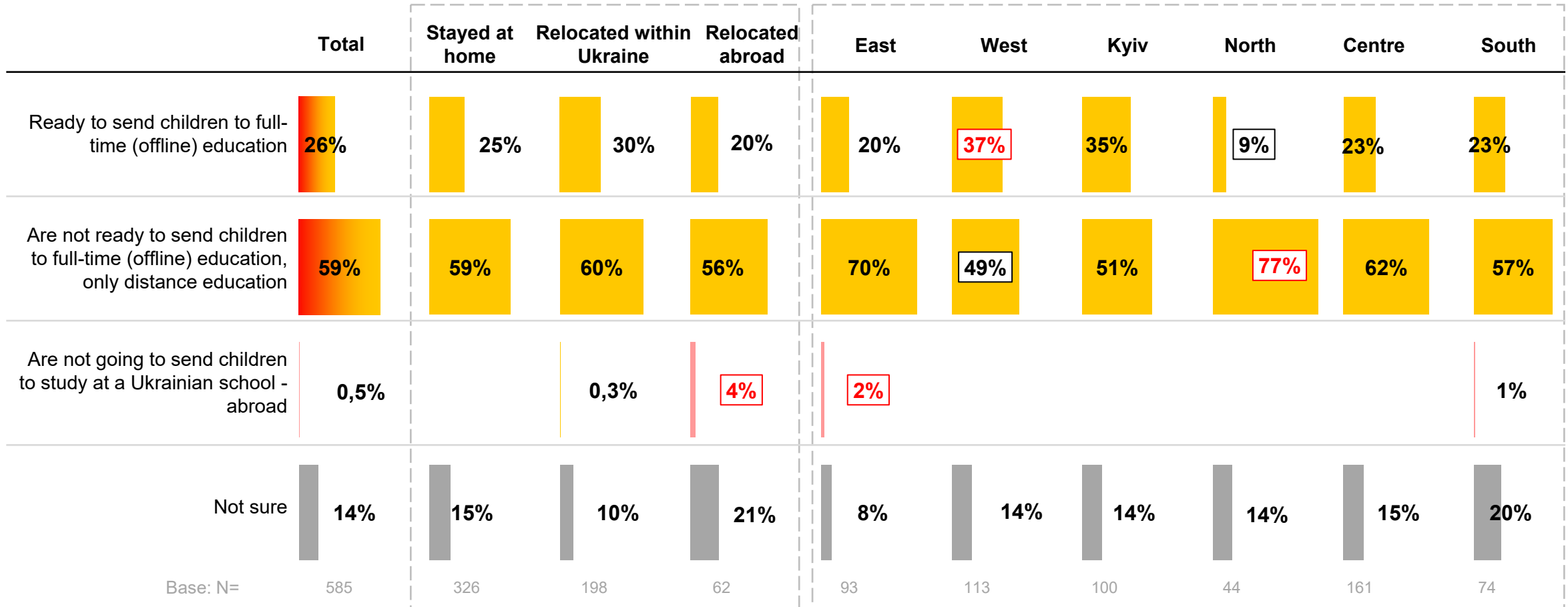
↓↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

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

READINESS TO SEND A CHILD TO FULL-TIME EDUCATION IN A UKRAINIAN SCHOOL


by migration status and region

The majority (59%) of respondents with children aged 6-17 are not ready to send their child to full-time education in school, only distance education, while 26% - are ready. Residents of the East and external migrants are significantly more likely intend not to send their children to Ukrainian schools in general, choosing instead to study abroad. Residents of the West more often than residents of other regions are ready to send their children to full-time education (37% vs 26%), while residents of the North more often choose distance education for their children (77% vs 59%).



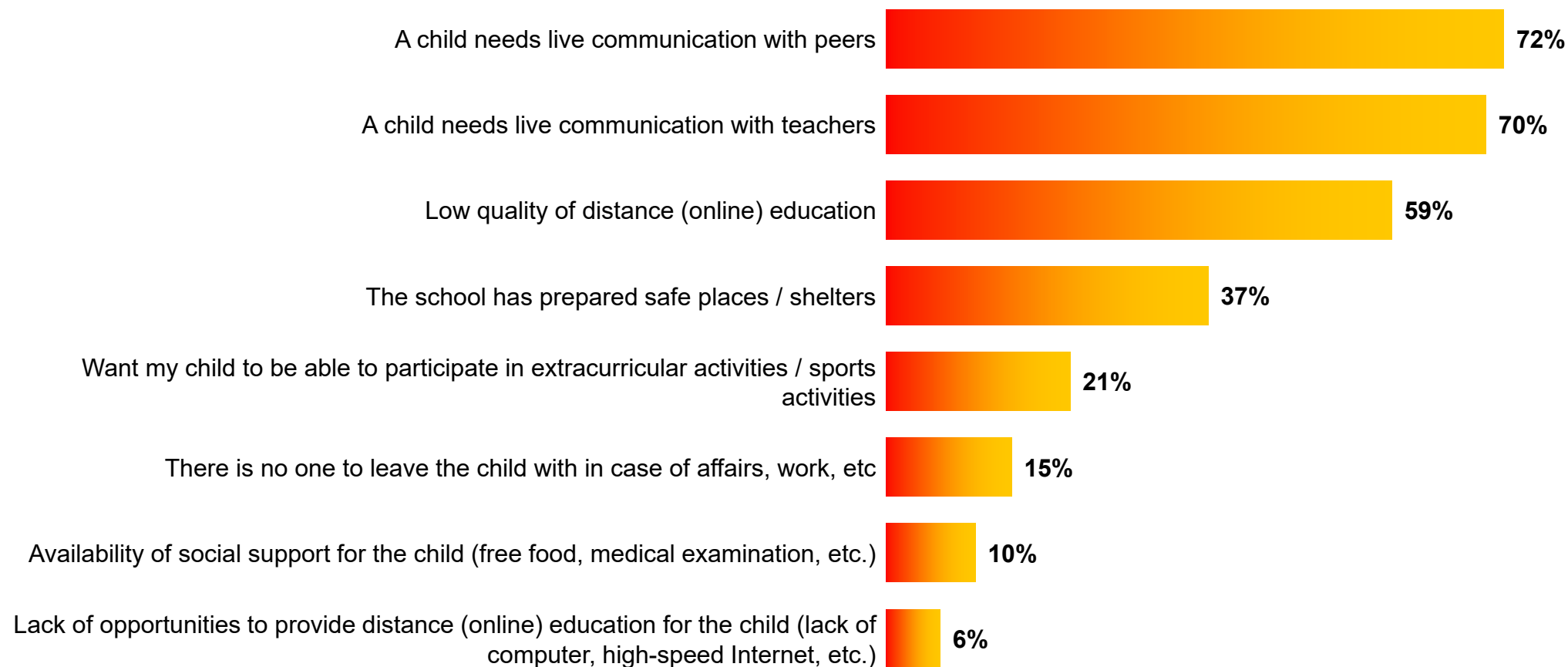
Base: respondents who have children aged 6-17

With what statement regarding the options of education of your child / children aged 6-17 years in a UKRAINIAN school in the new academic year (2022-2023) do you agree the most?

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

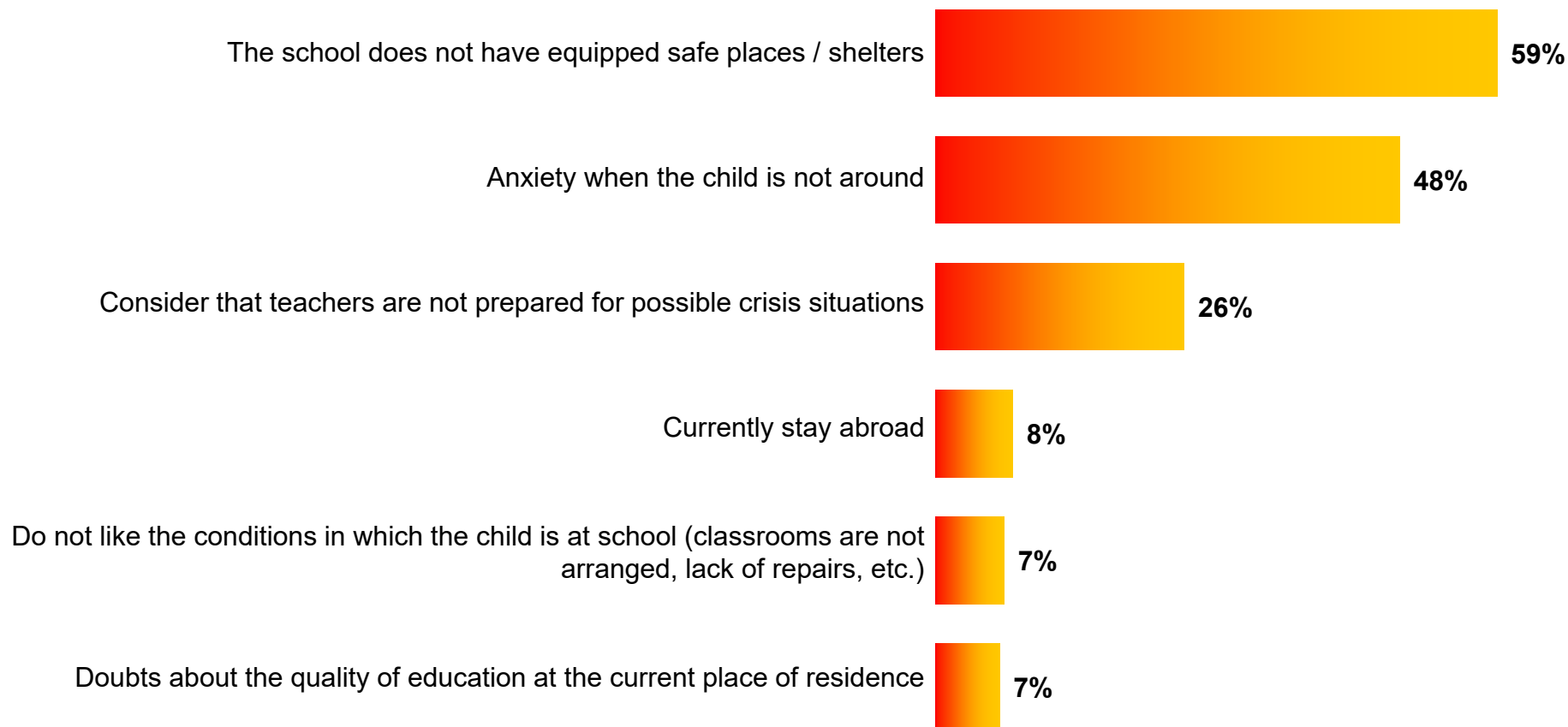
REASONS FOR THE READINESS TO SEND A CHILD TO FULL-TIME EDUCATION

The main reasons for readiness to send a child to full-time education in a Ukrainian school are that the child needs live communication with peers (72%) and teachers (70%), as well as the low quality of distance education (59%).



REASONS FOR THE READINESS TO SEND A CHILD TO DISTANCE EDUCATION

The main reasons why the respondents are not ready to send their child to full-time education in a Ukrainian school are the fact that the school does not have equipped safe places / shelters (59%), anxiety when the child is not around (48%) and the lack of preparation of teachers for possible crises situations (26%).



NECESSARY CONDITIONS FOR FULL-TIME EDUCATION FOR A CHILD

spontaneous answers

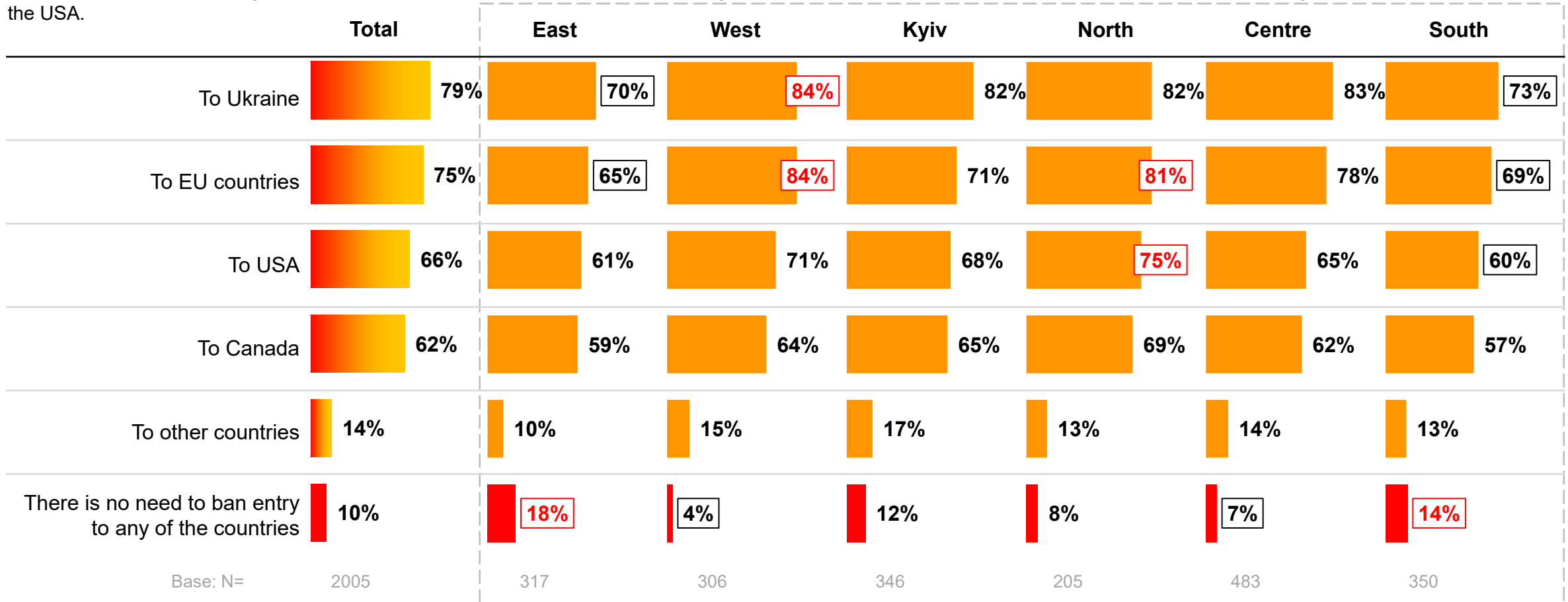
The majority of respondents who are not ready to send their children to full-time education note that they will be ready to do so if the war ends (59%). Other conditions mentioned by the respondents include the presence of an air-raid shelter (13%), safety in general (8%) and the absence of missile attacks (6%).



BAN ON ENTRY OF RUSSIANS TO COUNTRIES

by region

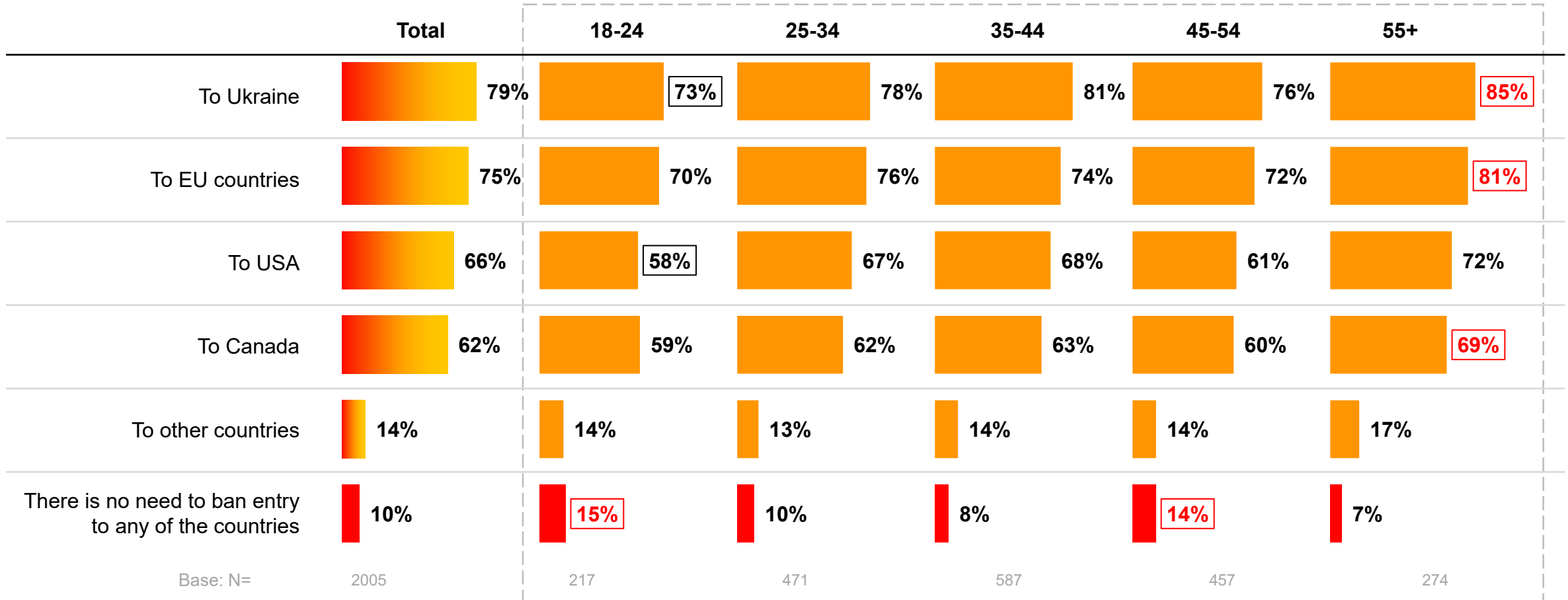
The vast majority (90%) of respondents consider that Russians must be banned from entering certain countries. More than half of the respondents also consider that Russians must be banned from entering Ukraine, EU countries, the USA and Canada. Residents of the Eastern and Southern regions significantly less often than residents of other regions consider that Russians must be banned from entering Ukraine and EU countries, and also more often consider that Russians must not be banned from entering any of the countries. Residents of the Western region more often consider that Russians must not be banned from entering any of the countries. Residents of the Western region more often propose to ban Russians from entering Ukraine and the EU countries, and residents from the Northern region - to the EU countries and the USA.




BAN ON ENTRY OF RUSSIANS TO COUNTRIES

by age

Respondents aged 18-24 significantly less often than other age groups consider that Russians must be banned from entering the territory of Ukraine and the USA. In addition, they and representatives of the 45-54 age group more often consider that Russians should not be banned from entering any of the countries. Respondents of 55+ age group significantly more often consider that Russians must be banned from entering Ukraine, EU countries, and Canada.



Base: all respondents
In your opinion, which countries must ban Russians from entering?

 Numbers that are statistically significantly **higher** / **lower** for the group, compared to the sample as a whole 67

**LATEST NEWS:
KNOWLEDGE AND
PERCEPTION**



MOST IMPORTANT NEWS OF THE LAST WEEK

spontaneous answers

The important news that most often spontaneously mentioned by respondents are explosions at military airfields / facilities in Crimea (33%), news about the war in general (12%) and shelling of the Zaporizhzhia NPP (10%).



Base: all respondents, N=2005

Only the alternatives that have been mentioned in >1% 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)

KNOWLEDGE OF THE EVENTS

The largest share of the audience is aware of the large-scale explosions at Russian military airfields in Crimea (80%). 63% of respondents know that Russian missiles hit the territory of the Zaporizhzhia NPP and that Ukraine continues to shell important for Russia bridges in the Kherson oblast. The least respondents know about that Ukraine will receive a new package of military aid from the USA (48%).




KNOWLEDGE OF THE EVENTS

by region

Respondents from Kyiv significantly more often heard that Ukraine continues shelling important for Russia bridges in the Kherson oblast. Respondents from the East significantly less often heard that there were large-scale explosions at Russian military airfields in Crimea and that Russian missiles hit the territory of the Zaporizhzhya NPP.

	Total	East	West	Kyiv	North	Centre	South
Large-scale explosions at Russian military airfields in Crimea	80%	74%	76%	82%	82%	82%	84%
Russian missiles hit the territory of the Zaporizhzhya NPP	63%	55%	67%	60%	68%	64%	64%
Ukraine continues shelling important for Russia bridges in the Kherson oblast	63%	58%	61%	68%	65%	64%	59%
Ukraine will receive a new package of military aid from the USA	48%	50%	48%	49%	55%	45%	47%
Not sure / Have not heard about any of these	8%	12%	6%	7%	7%	9%	8%
Base: N=	2005	317	306	346	205	483	350

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 the region, compared to the sample as a whole

KNOWLEDGE OF THE EVENTS


by age

Respondents of the 55+ age group are the most aware of all the important events of the last week from the list. At the same time, respondents aged 18-24 know about all of these events significantly less than the sample in general. Respondents aged 45-54 heard about large-scale explosions at Russian military airfields in Crimea and that Ukraine continues shelling important for Russia bridges in the Kherson oblast significantly more often than the sample in general. Respondents of the 25-34 and 35-44 age groups heard significantly less about the latest event. In addition, respondents aged 25-34 heard less often about explosions at airfields in Crimea, and respondents aged 35-44 - about the new package of military aid to Ukraine from the USA.

	Total	18-24	25-34	35-44	45-54	55+
Large-scale explosions at Russian military airfields in Crimea	80%	65%	74%	81%	85%	91%
Russian missiles hit the territory of the Zaporizhzhya NPP	63%	55%	63%	59%	63%	75%
Ukraine continues shelling important for Russia bridges in the Kherson oblast	63%	44%	58%	58%	69%	85%
Ukraine will receive a new package of military aid from the USA	48%	36%	46%	42%	53%	67%
Not sure / Have not heard about any of these	8%	18%	9%	9%	6%	1%
Base: N=	2005	217	471	587	457	274

Base: all respondents

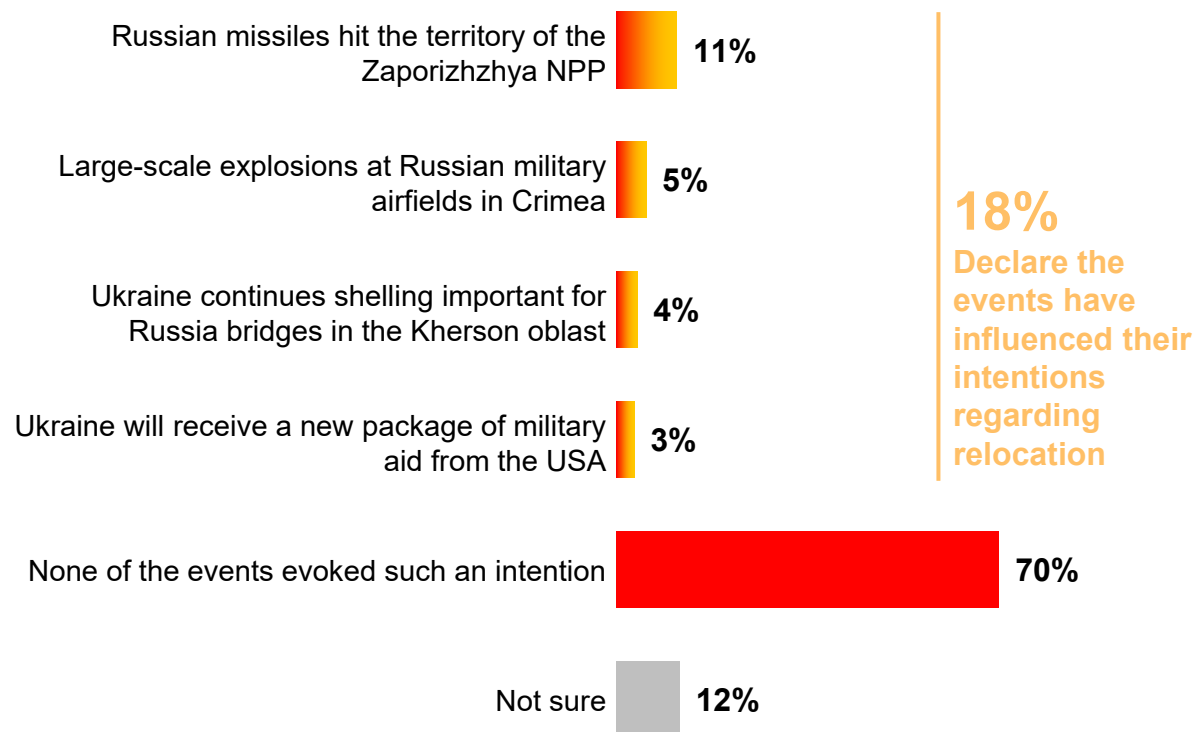
Which of the following events that occurred last week did you know / hear about?

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

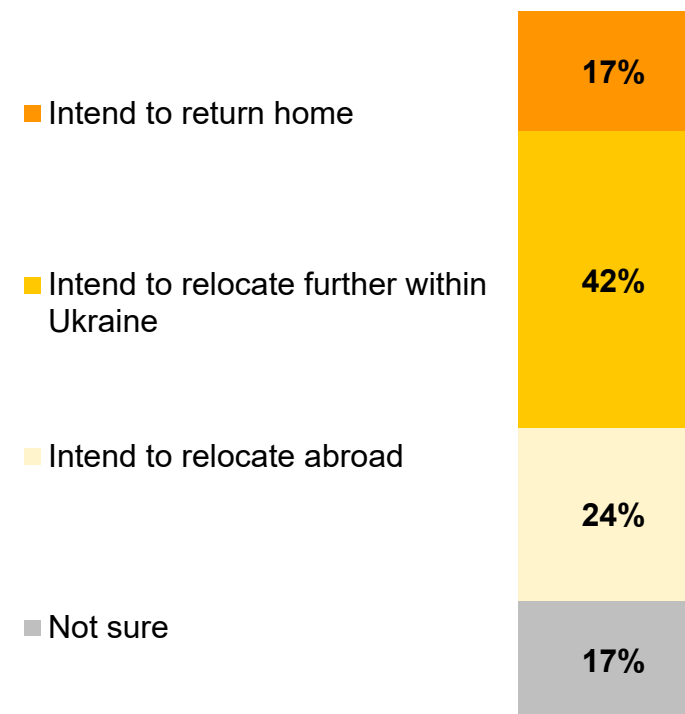
THE EFFECT OF THE AFOREMENTIONED EVENTS ON PLANS REGARDING RELOCATION

In the majority (70%) of the respondents, the events they heard about did not make them want to change their current place of residence. The news that Russian missiles hit the territory of the Zaporizhzhya NPP caused this desire most often (11%). Among the directions of relocation that the respondents plan to do in connection with the listed news, the most common is migration within Ukraine (42%).

The effect of the events on plans regarding relocation



Relocation specifics



Base: those who stayed in Ukraine and have heard about the aforementioned events, N = 1839

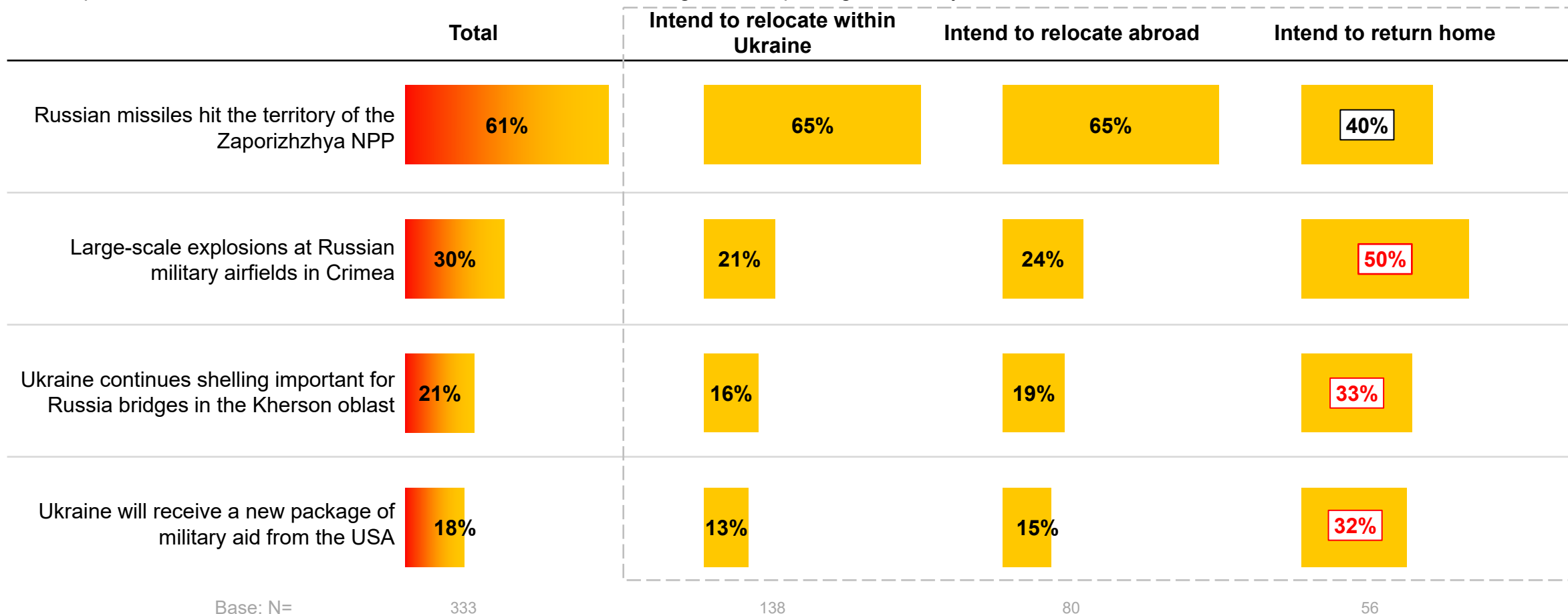
Base: respondents who want to relocate because of these events, N = 333

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

Respondents who have the intention to return to their permanent place of residence were significantly less often affected by the news that Russian missiles hit the territory of the Zaporizhzhya NPP, and significantly more often by other news from the list: about explosions at airfields in Crimea, Ukraine's shelling of bridges that are important for Russia in the Kherson oblast, and Ukraine's receiving of a new package of military aid from the United States.



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?

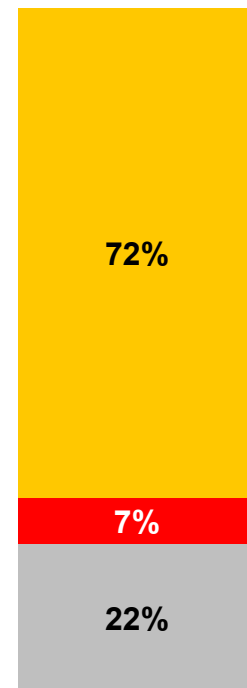
 Numbers that are statistically significantly **higher** / **lower** for a group, 74
compared to the sample as a whole

HOLDING THE WORLD EXPO IN 2030 IN UKRAINE

The vast majority of respondents (72%) support holding the EXPO world exhibition in 2030 in Ukraine. In addition, the majority of respondents (77%) agree that holding the World Expo in Ukraine will help to attract investments to our country.

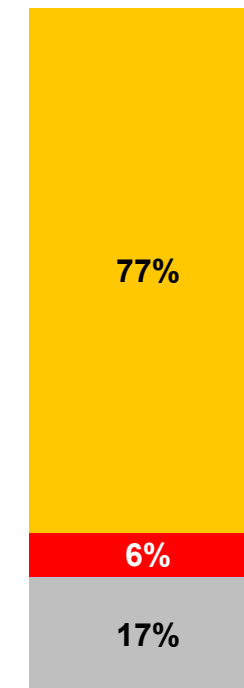
Support for the idea of holding the Expo 2030 World Exhibition in Ukraine, in Odesa

- Support (completely + rather)
- Don't support (completely + rather)
- Not sure



Agree with the statement "Holding the Expo World Exhibition in Ukraine will help to attract investments to our country"


- Agree (strongly + rather)
- Disagree (completely + rather)
- Not sure



Base: respondents, N=2005.

To what extent do you support the idea of holding the Expo 2030 World Exhibition in Ukraine, namely in Odesa?

To what extent do you agree with the statement: "Holding the World Expo in Ukraine will help to attract investments to our state"?

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

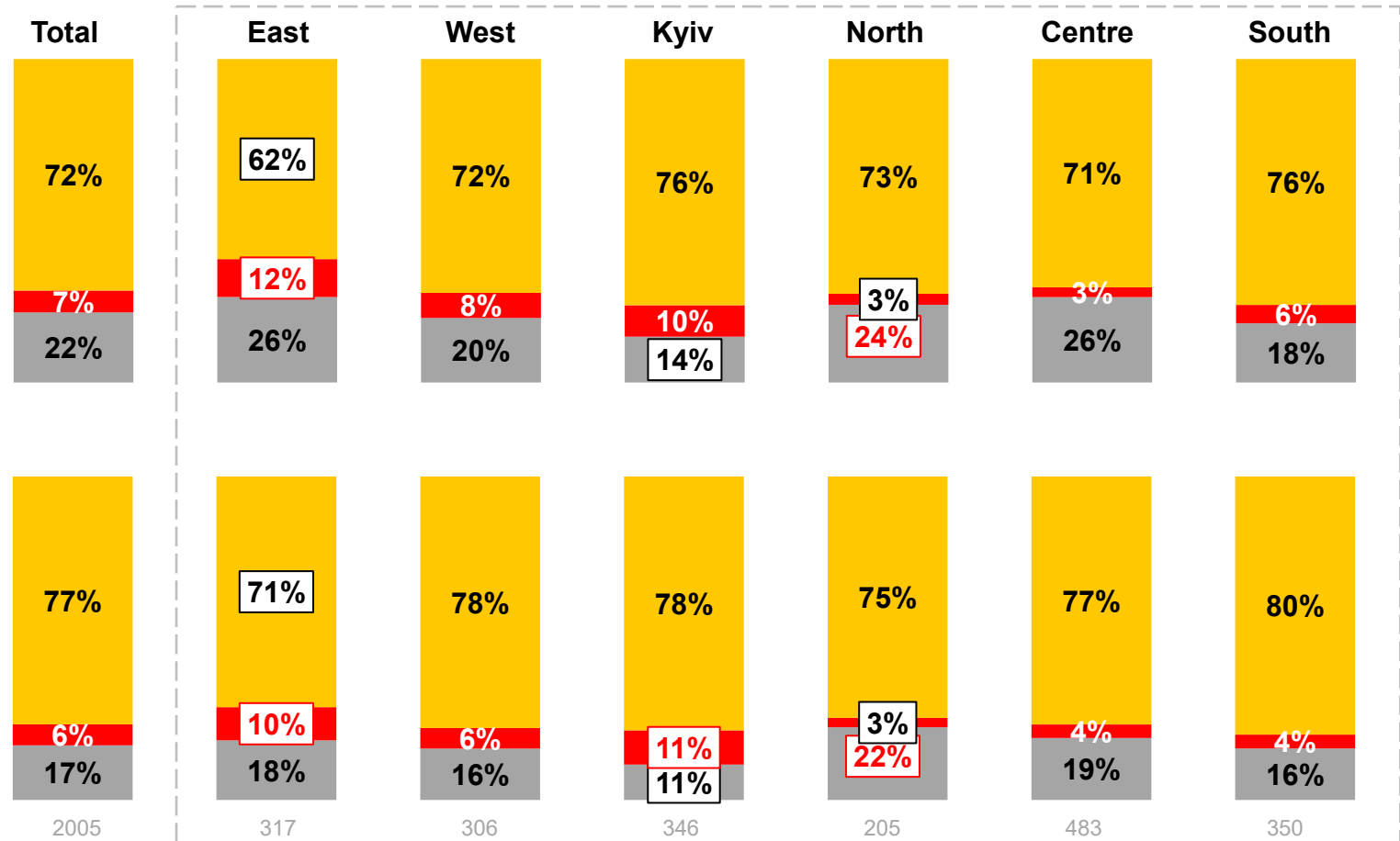
HOLDING THE WORLD EXPO IN 2030 IN UKRAINE

by region

The idea of holding Expo 2030 in Ukraine is significantly more often not supported in the East, and significantly less often in the North. Residents of the East and Kyiv significantly more often disagree with the statement that holding the Expo in Ukraine will help to attract investments to it, while residents of the North, on the contrary, disagree significantly less often.

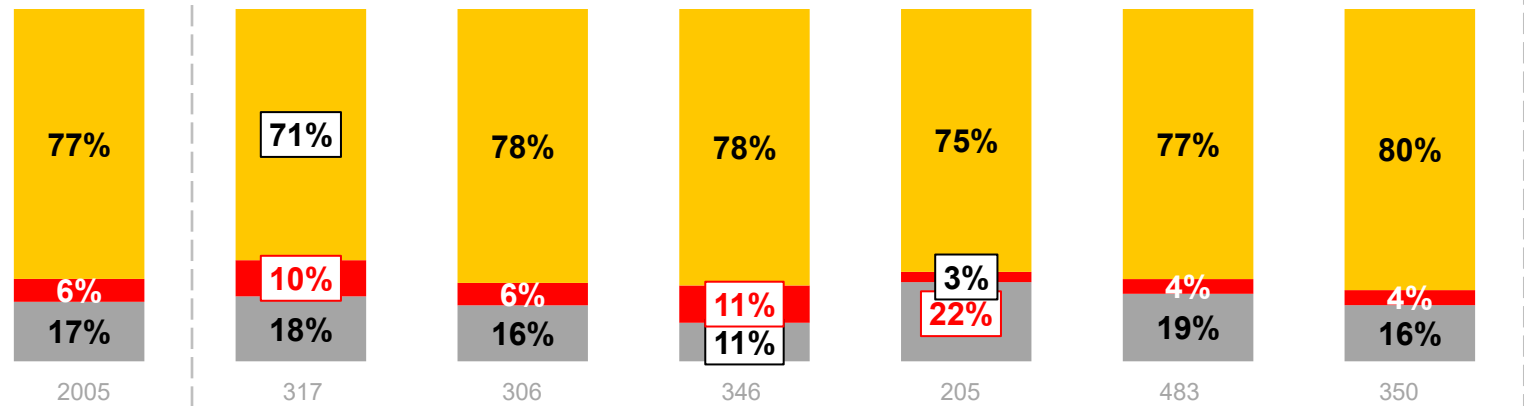
Support for the idea of holding the Expo 2030 World Exhibition in Ukraine, in Odesa

- Support (completely + rather)
- Don't support (completely + rather)
- Not sure



Agree with the statement "Holding the Expo World Exhibition in Ukraine will help to attract investments to our country"

- Agree (strongly + rather)
- Disagree (completely + rather)
- Not sure



Base: respondents.

Base: N=

2005

317

306

346

205

483

350

To what extent do you support the idea of holding the Expo 2030 World Exhibition in Ukraine, namely in Odesa?

To what extent do you agree with the statement: "Holding the World Expo in Ukraine will help to attract investments to our state"?

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

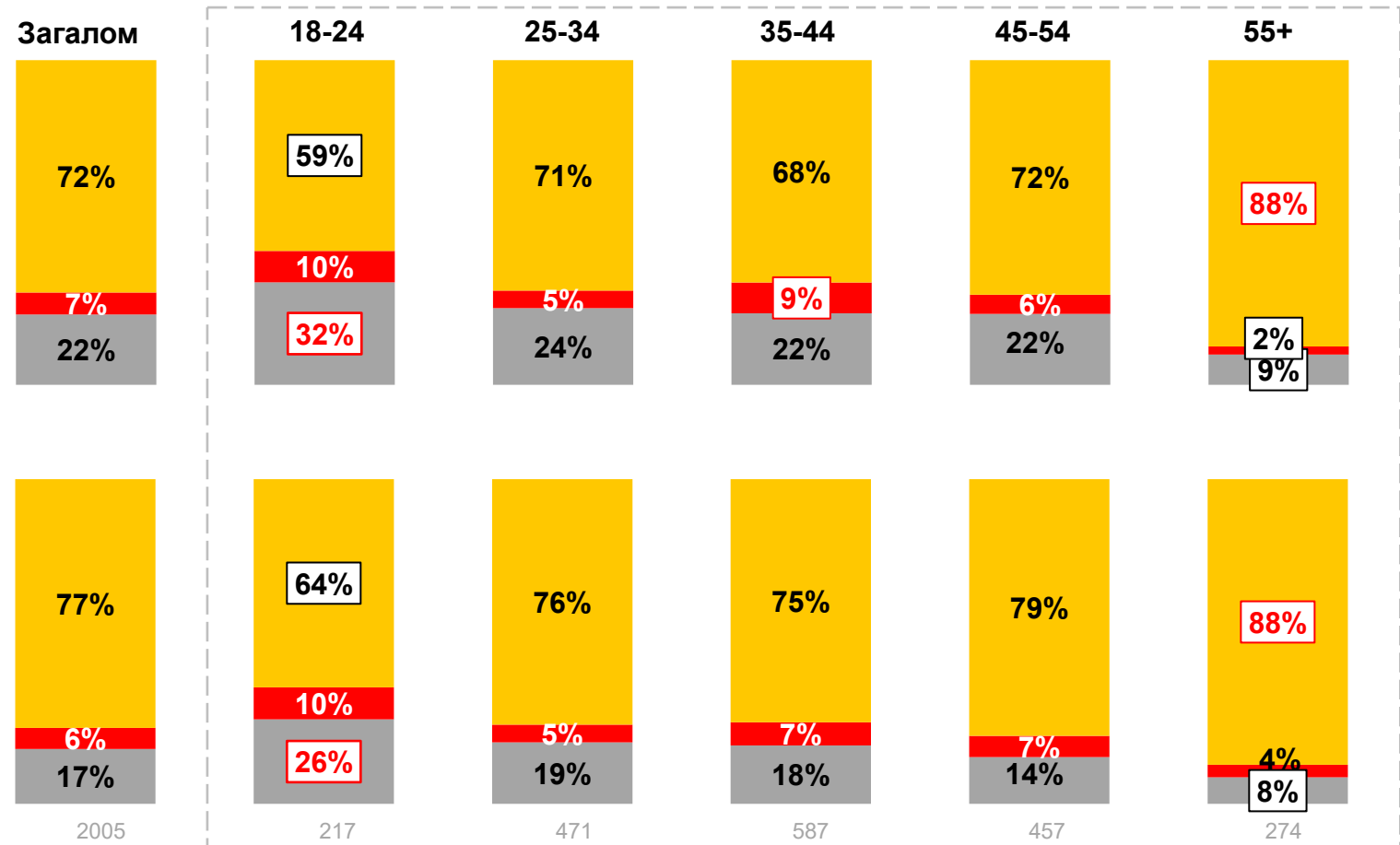
HOLDING THE WORLD EXPO IN 2030 IN UKRAINE

by age

The idea of holding the Expo 2030 in Ukraine is significantly less supported by respondents aged 18-24 (59% vs 72%), while respondents aged 55+ express support for this idea more often than other age groups (88% vs 72%). Representatives of the 18-24 age group significantly less often agree with the statement that holding the Expo in Ukraine will help to attract investments to it (64% vs 77%), while representatives of the 55+ age group, on the contrary, agree significantly more often (88% vs 77%).

Support for the idea of holding the Expo 2030 World Exhibition in Ukraine, in Odesa

- Support (completely + rather)
- Don't support (completely + rather)
- Not sure



Base: respondents.

Base: N=

2005

217

471

587

457

274

To what extent do you support the idea of holding the Expo 2030 World Exhibition in Ukraine, namely in Odesa?

To what extent do you agree with the statement: "Holding the World Expo in Ukraine will help to attract investments to our state"?

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

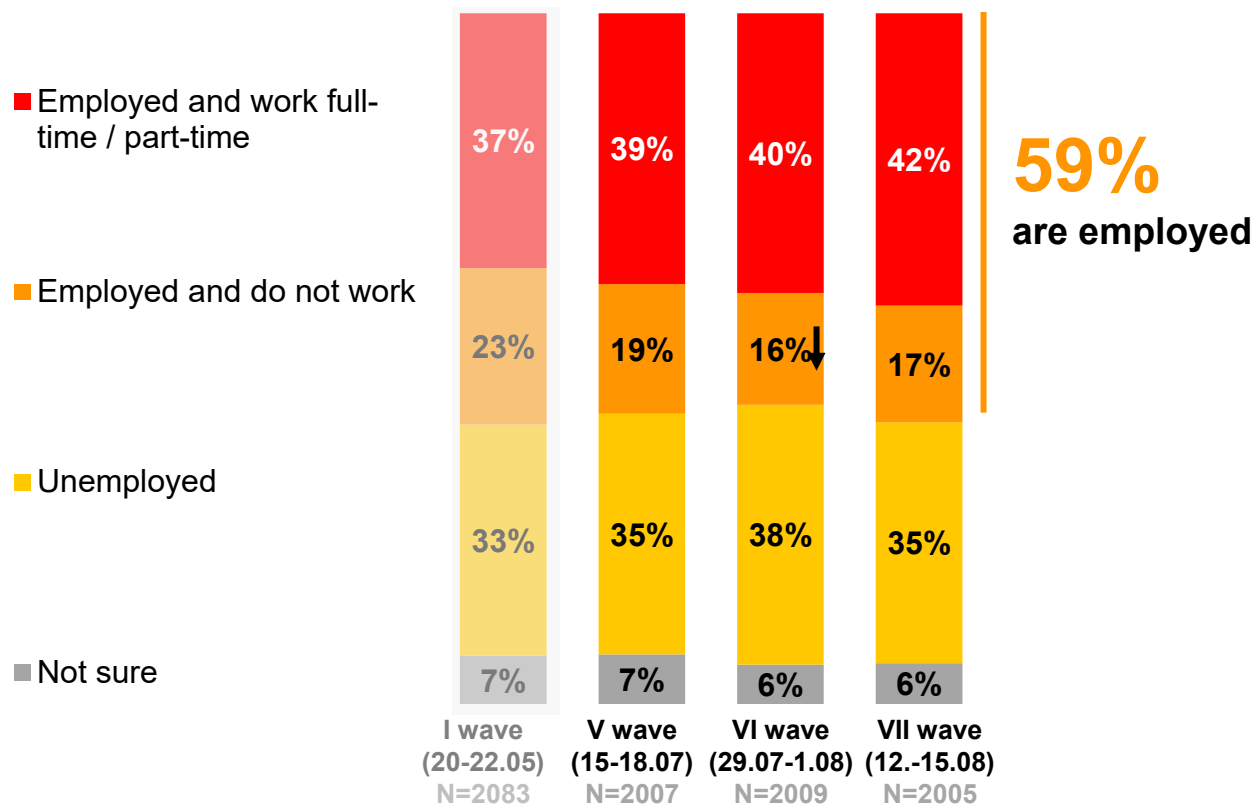
EMPLOYMENT DURING THE WAR



EMPLOYMENT DURING THE WAR

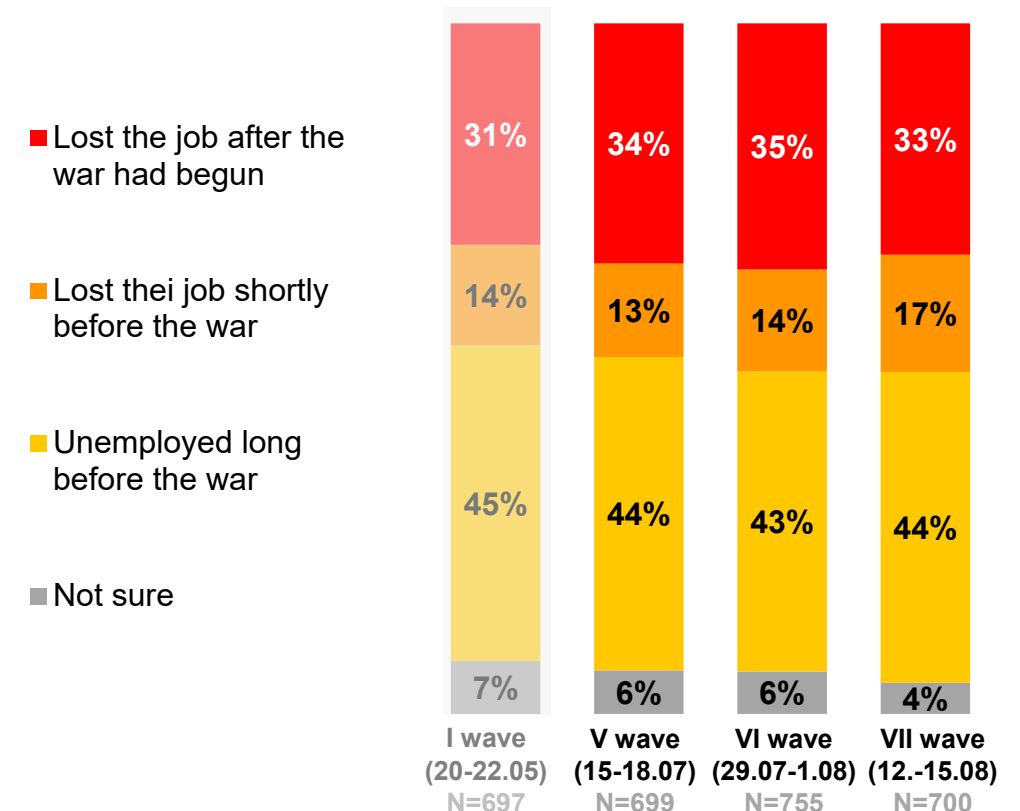
In the current wave, there were no recorded significant changes in employment status - 59% of Ukrainians* have a job. At the same time, 42% of them actively work full-time / part-time, and 17% do not perform any work tasks. 35% of Ukrainians* are unemployed - a third of them (33%) lost their jobs after the war had begun and 44% were unemployed long before the invasion.

Employment:



Base: all respondents

Unemployment specifics:





Base: respondents who are unemployed now

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

Are you currently employed?

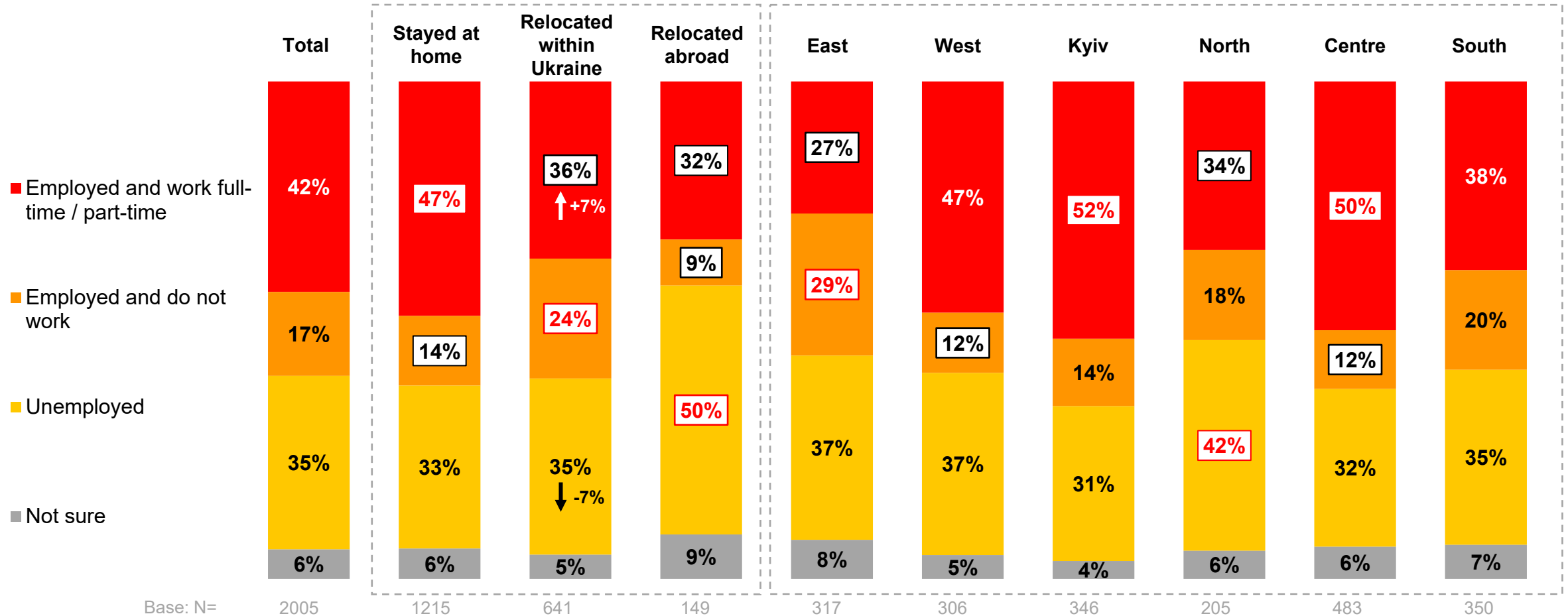
Which of the following phrases best describes your situation:

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

EMPLOYMENT DURING THE WAR

by migration status and region

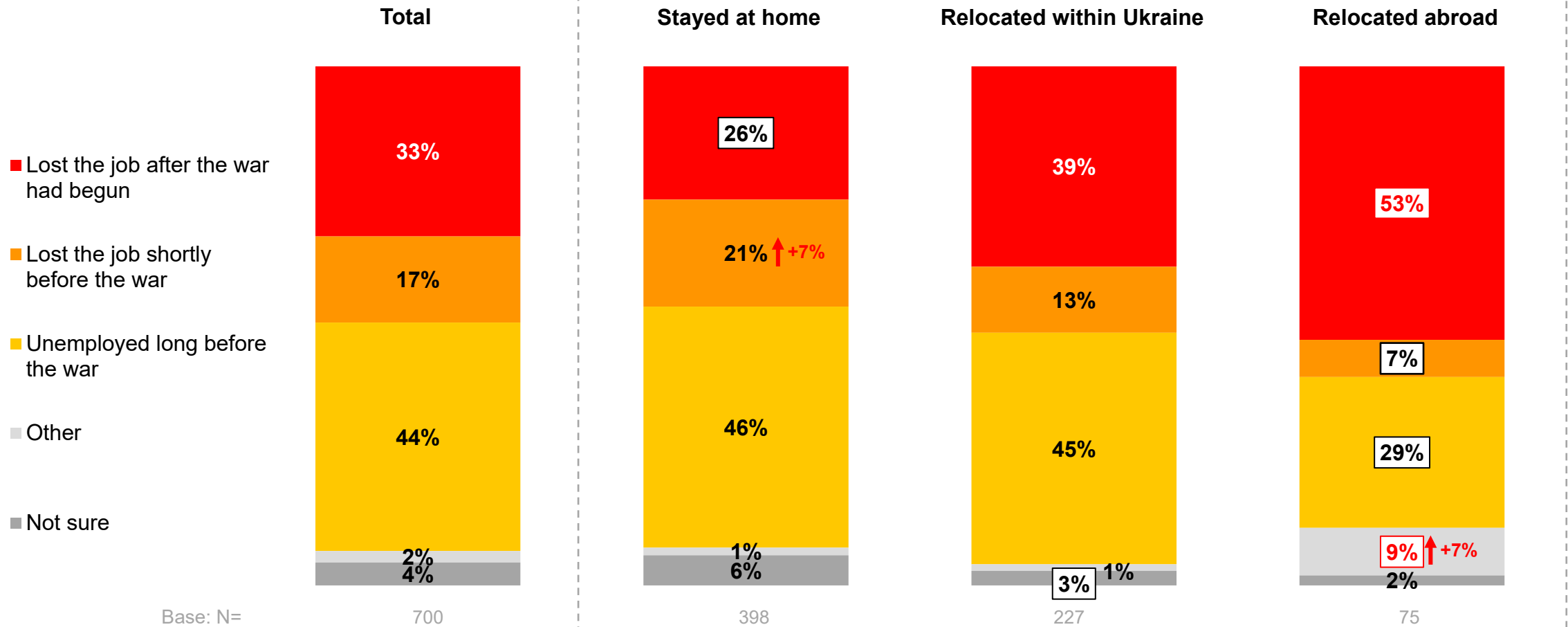
Among those who stayed at home, there is a significantly higher share of those who have a job and are actively working among residents of Kyiv and the Central region. There is observed a positive trend among external migrants in the 7th wave of the survey - the share of those who have a job increased by 7% and is at 36%.





UNEMPLOYMENT SPECIFICS

by migration status

The highest share of those who lost their jobs since the beginning of a full-scale invasion was recorded among those who relocated abroad (53%), while the lowest share - among the group who stayed at home (26%). Compared to the previous wave, among those who stayed at home, there was a significant increase in the share of those who lost their jobs shortly before the war had begun (+7%).



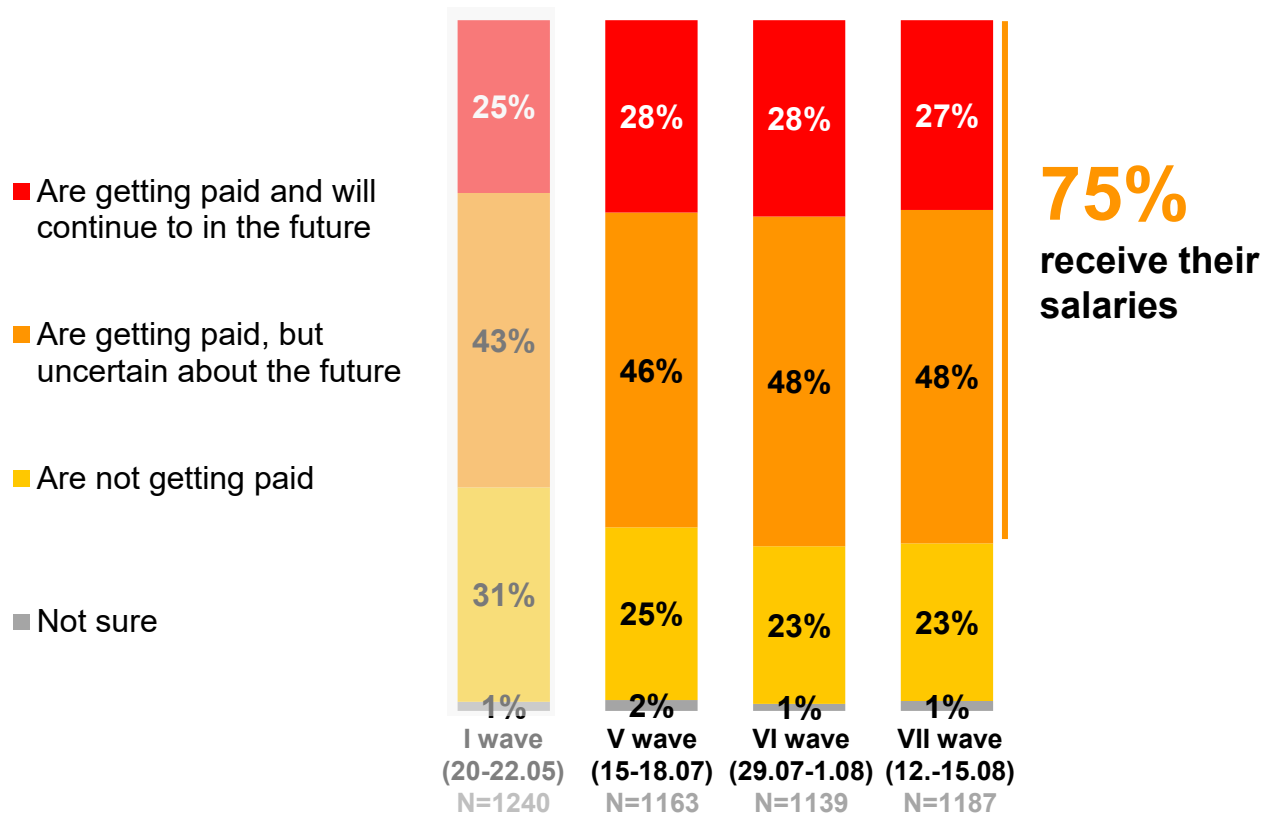
 Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

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

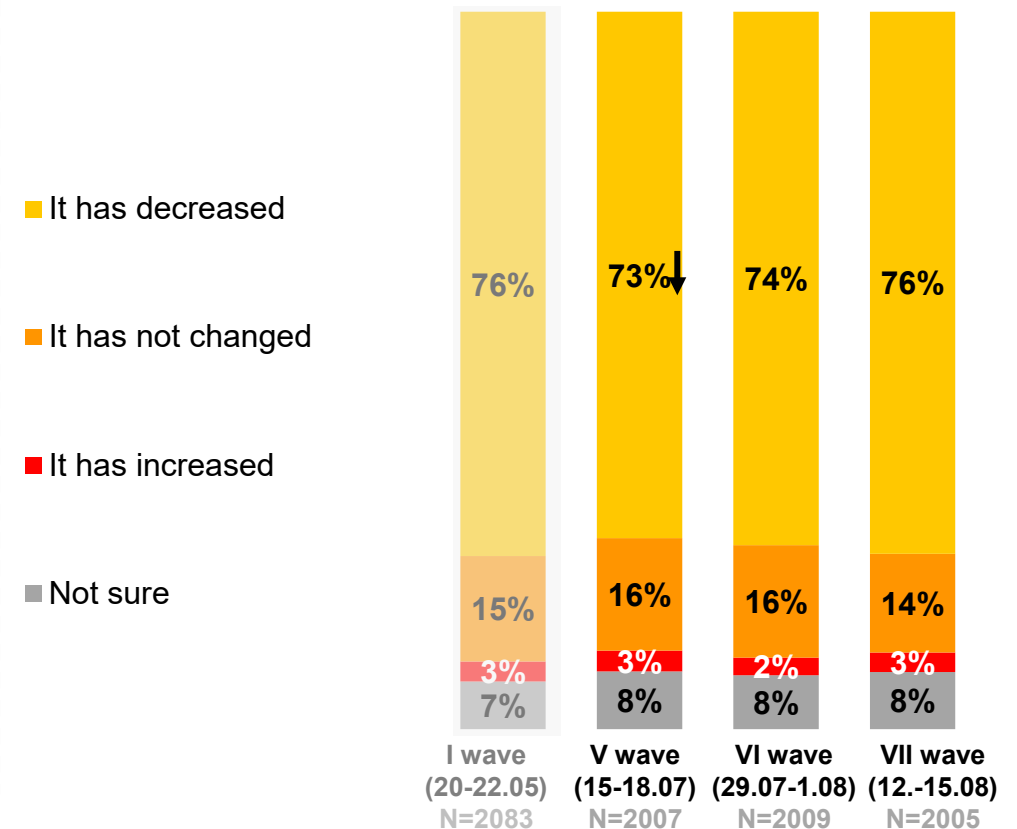
INCOME DURING THE WAR

The majority of Ukrainians continue to declare a decrease in income since the beginning of the full-scale invasion (76%) and only 3% indicate that their income has increased. There were no special changes in income stability among the working population - 75% continue to receive a salary. However, among them: the share of those who are confident that they will receive it in the future remains at the level of 27%, while 48% do not have such confidence.

Income stability:



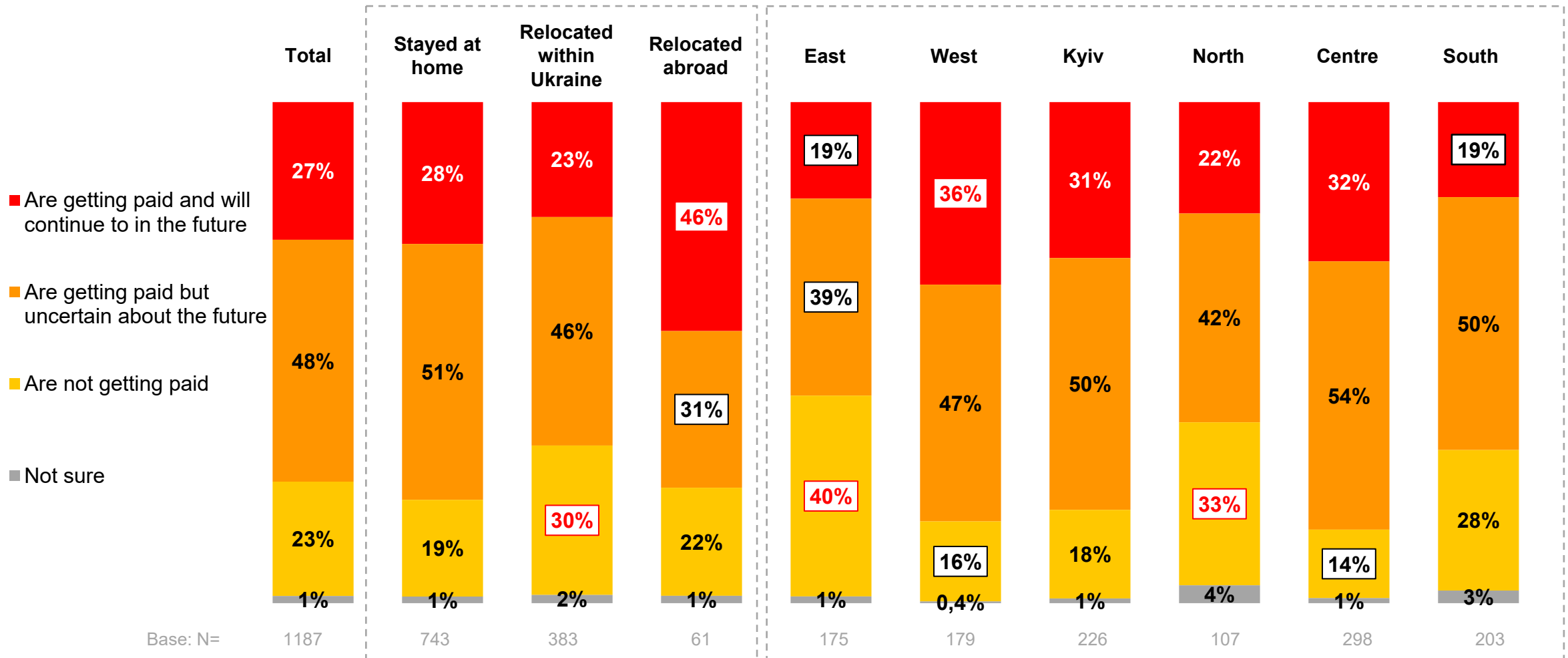
Changes in income:




INCOME DURING THE WAR


by migration status and region

A significantly higher share of those who have confidence in receiving a salary in the future is recorded among those who relocated abroad, as well as residents of the Western and Central regions. In the sixth wave, there was also a significant decrease in the share of those who do not get a payment among those who stayed at home.



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

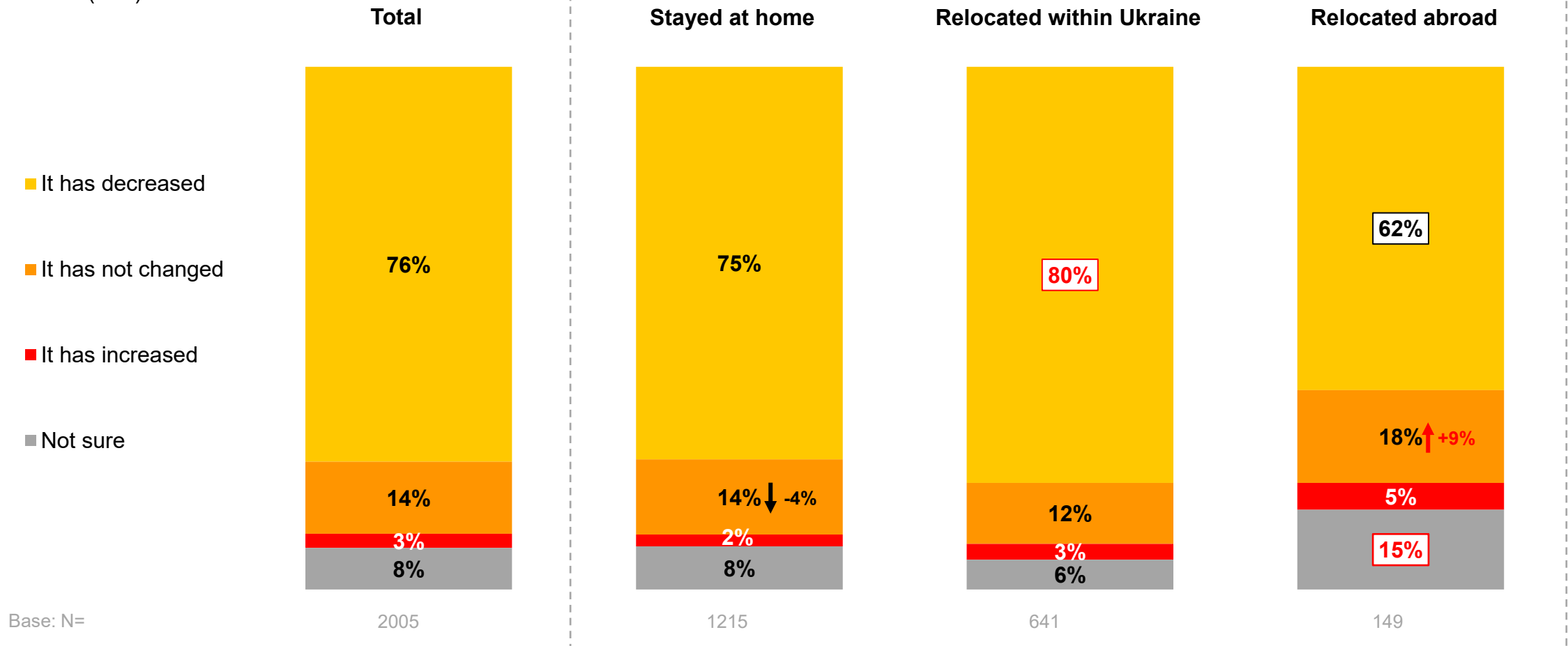
 Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

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

INCOME CHANGES

by migration status

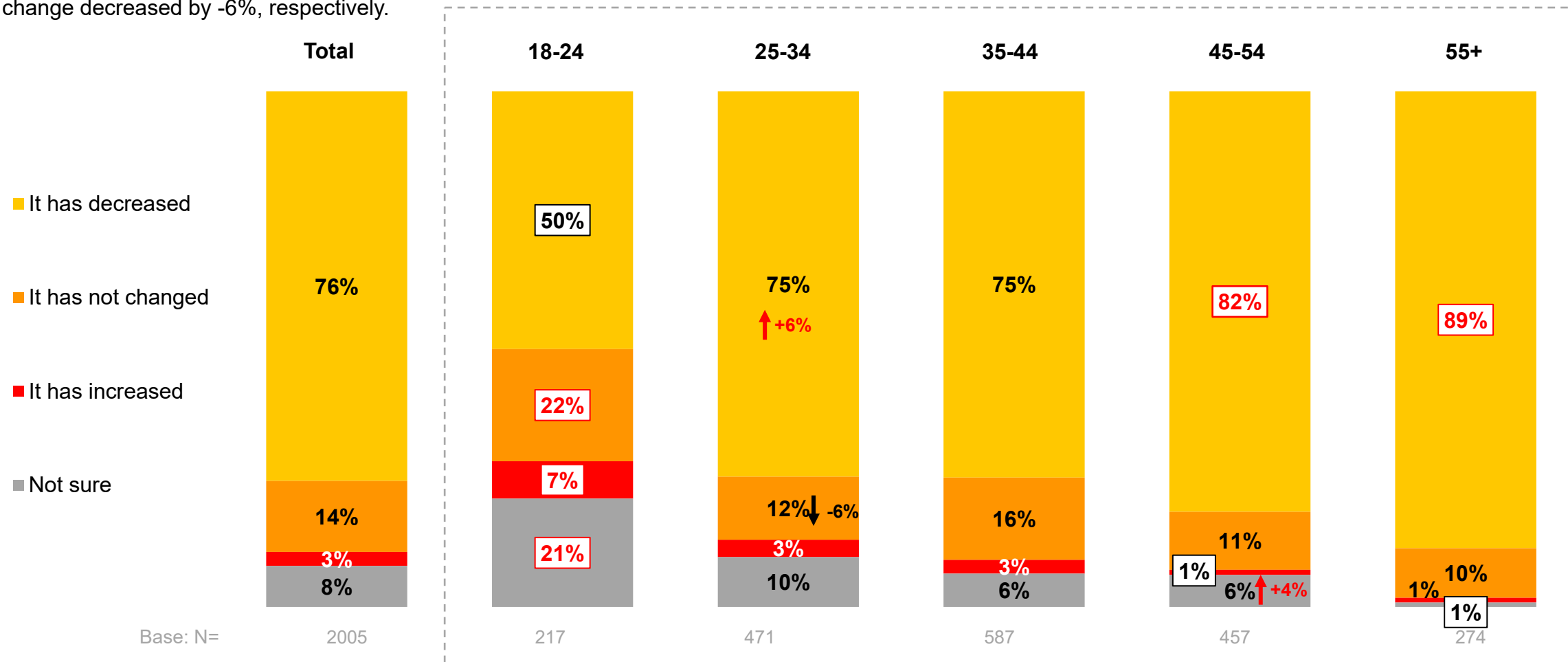
The largest share of those who declare a decrease in income is recorded among internal migrants (80% vs 76%), while among those who have relocated abroad, it is the smallest (62% vs 76%). Also, compared to the previous wave, there was a significant increase in the share of those whose income did not change among those who migrated abroad. Compared to the previous wave, among the group of those who stayed at home, the share of those whose income did not change significantly decreased (-4%).



INCOME CHANGES

by age

The largest share of those who declare a decrease in income is recorded among the audience over 45 years. While among young age group, the share of such people is significantly smaller and among them 50% indicated that their income has decreased since the beginning of the full-scale invasion. Compared to the previous wave, among the 25-34 age group, there was a significant increase in the share of those who declared a decrease in their income, while the share of those whose income did not change decreased by -6%, respectively.

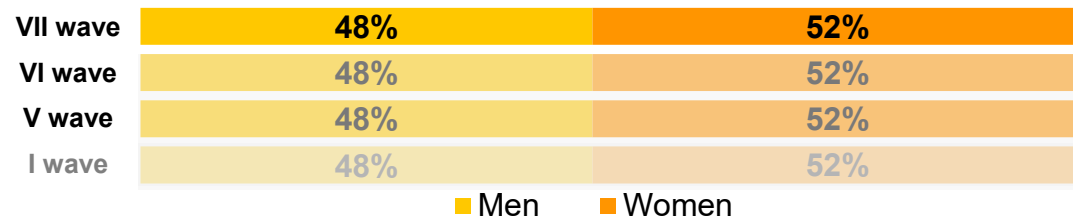


SAMPLE STRUCTURE

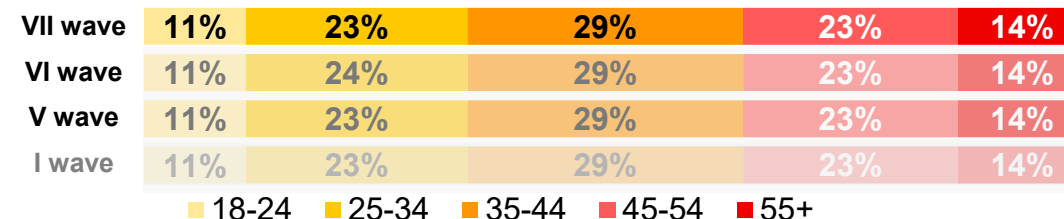


SAMPLE STRUCTURE

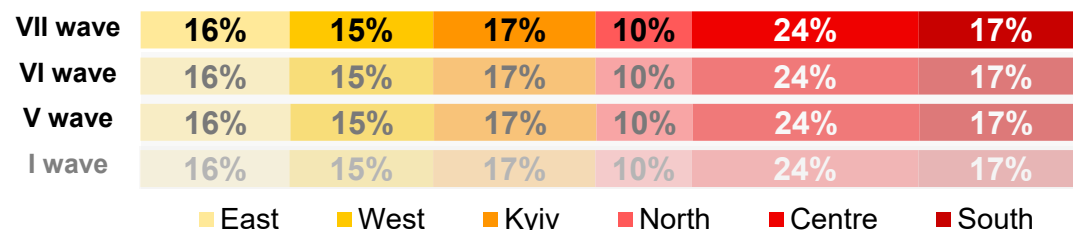
Gender



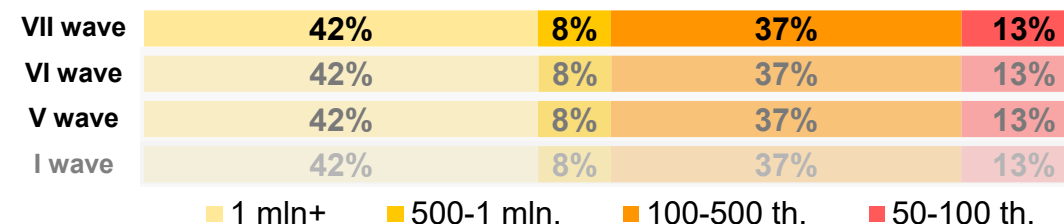
Age



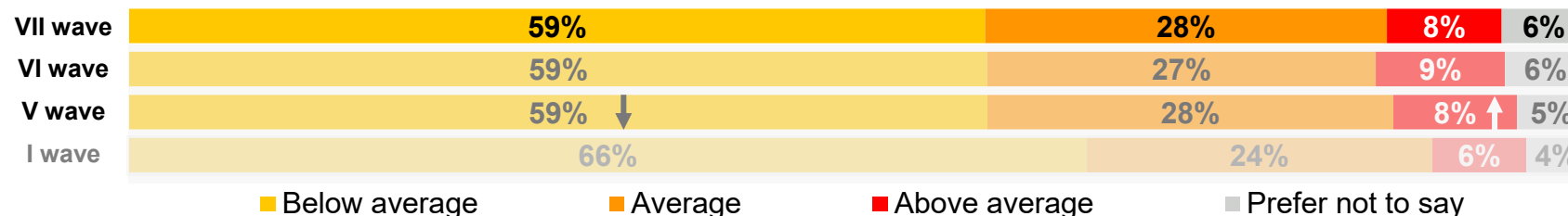
Region (before the war)



Size of settlement (before the war)

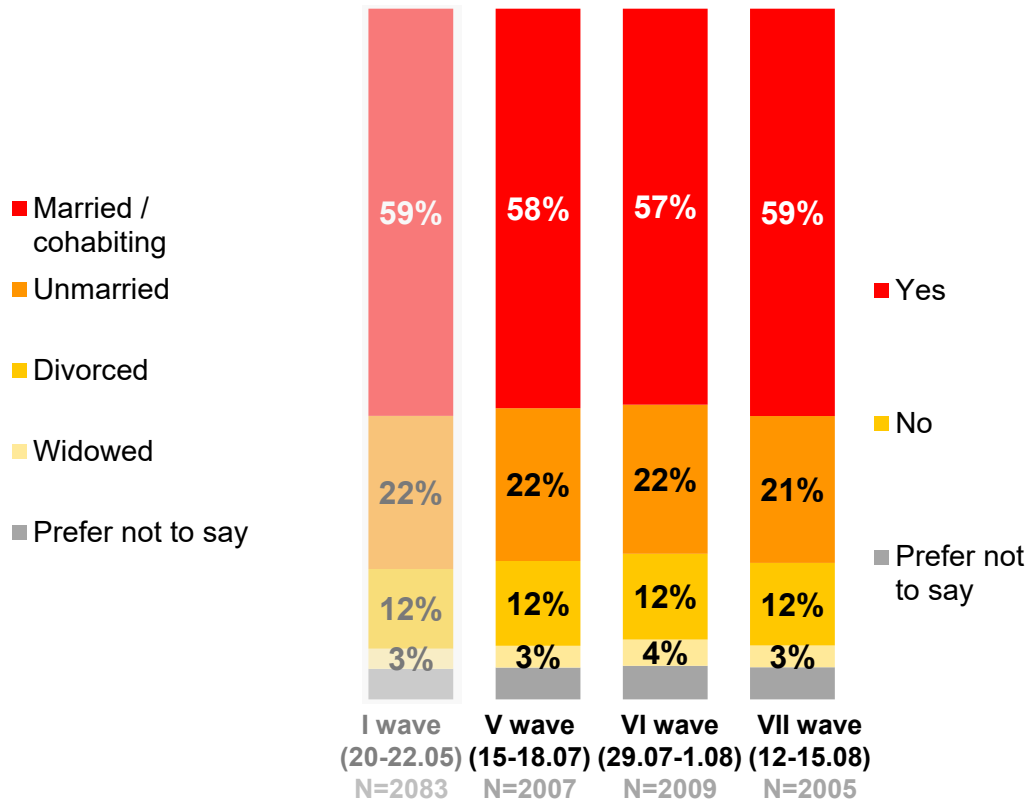


Income level

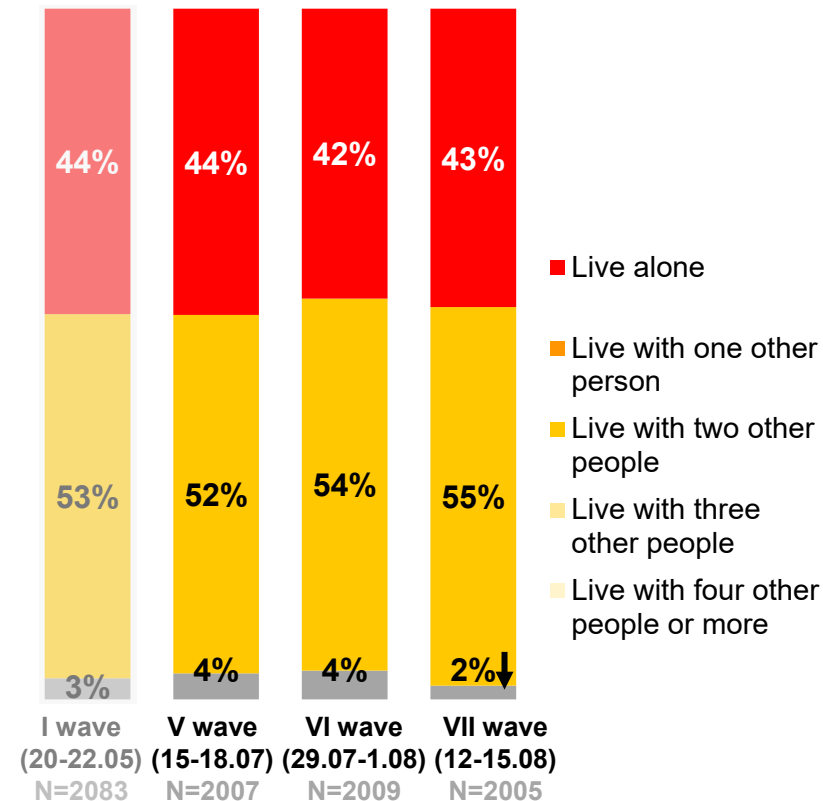


SOCIO-DEMOGRAPHIC PROFILE

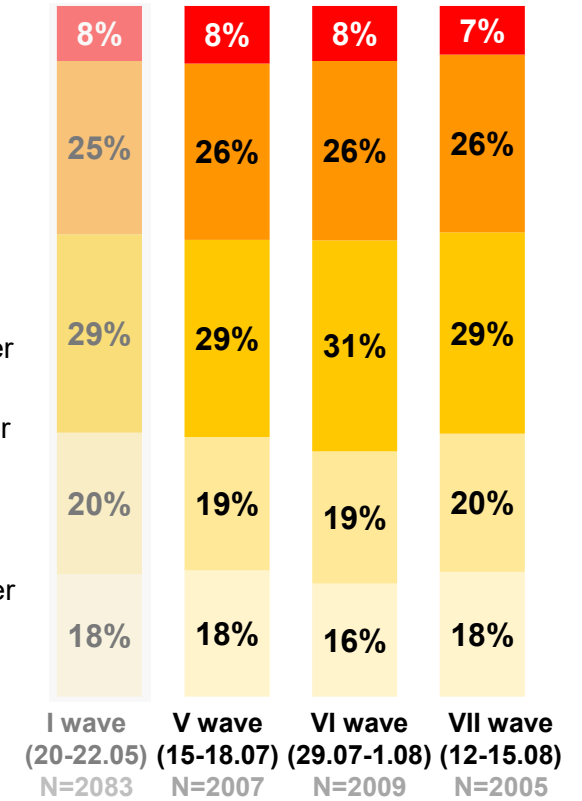
Marital status



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



Number of people who live in the household



SOCIO-DEMOGRAPHIC PROFILE

by migration status (VII wave)

		Total	Stayed at home	Relocated within Ukraine	Relocated abroad
Gender	Men	48%	50%	51%	20%
	Women	52%	50%	49%	80%
Age	18-24	11%	10%	13%	11%
	25-34	23%	23%	26%	17%
	35-44	29%	27%	33%	30%
	45-54	23%	26%	17%	24%
	55+	14%	15%	11%	18%
Region (before the war)	East	16%	8%	29%	20%
	West	15%	19%	8%	19%
	Kyiv	17%	14%	23%	19%
	North	10%	10%	12%	8%
	Centre	24%	31%	11%	18%
	South	17%	18%	17%	14%
Income level	Below average	59%	61%	61%	35%
	Average	28%	26%	27%	42%
	Above average	8%	7%	9%	11%
	Prefer not to say	6%	6%	4%	12%
Marital status	Married / cohabiting	59%	58%	62%	52%
	Unmarried	21%	21%	21%	21%
	Divorced	12%	13%	10%	16%
	Widowed	3%	3%	3%	9%
	Prefer not to say	5%	5%	4%	2%
Presence of children under the age of 18 who live with the respondents	Yes	43%	40%	48%	53%
	No	55%	58%	50%	46%
	Prefer not to say	2%	2%	2%	1%
Number of people who live in the household	Live alone	7%	7%	6%	9%
	Live with one other person	26%	30%	20%	18%
	Live with two other people	29%	28%	34%	23%
	Live with three other people	20%	17%	24%	26%
	Live with 4 other people and more	18%	18%	18%	24%
Base, N		2005	1215	641	149

Base: all respondents



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



Centre for
Economic
Recovery

°Gradus Research
Company

✕ Advanter

