



Centre for
Economic
Recovery

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SOCIAL SCREENING OF UKRAINIAN SOCIETY DURING THE RUSSIAN INVASION – the eighth 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 | VIII wave – 2060 |
| 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 | VIII wave – August 25 – August 28 |
| IV wave – July 1 – July 4 | |
| V wave – July 15 – July 18 | |

SUMMARY (1/4)

Ukrainians'* actions during the war

- **In the eighth wave, there are no significant differences regarding the migration status of Ukrainians* compared to the previous wave:** 60% of respondents have **stayed at their permanent place** of residence (more often these are residents of the Center, West and South – 79%, 74% and 66%, respectively); the rest (39%) of the audience **changed their place of residence**. Among **those who migrated**, 18% have already **returned home** (more often these are the residents of Kyiv and the North – 35% and 33%), and 21% **continue to be far away from home** (mostly these are residents of the East – 56%).
- The distribution of answers regarding migration directions also remained at the level of the previous wave: 65% of respondents migrated **to another oblast of Ukraine** (mainly to Lviv oblast), 17% migrated **within their own oblast**, and 17% **relocated abroad** (mainly to Poland and Germany).
- The distribution of answers regarding the desire to **relocate in the event of an aggravation of the situation** among Ukrainians* **who stayed in Ukraine** is at the level of the previous wave: 55% want 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 have the **opportunity to relocate** within the country in case of aggravation of the situation increased (from 29% to 32%). The share of people who have the opportunity to relocate abroad remained unchanged (19%).
- The share of those who want to **return home at the first opportunity** among people who have relocated abroad and have not yet returned remains unchanged (55%). At the trend level, there is an increase in the share of those who **state their desire to stay in another country** (from 20% to 27%; mainly due to a decrease in the share of people who hesitate to answer). Also, the share of people who have the opportunity to stay in another country continues to grow from wave to wave (in the current wave, their share is 75%), while 8% of respondents do not have such an opportunity, and 16% hesitate to answer.
- **Safety** in the settlement and, conversely, its absence remain the biggest **driver** (58%; the indicator decreased from 74% in the current wave) and, accordingly, the biggest **barrier** to the **return to Ukraine of those who relocated abroad** (66%, at the level of the previous wave).
- The distribution of answers of **internal migrants** regarding the desire and opportunity to **stay in a new place** remains without significant changes: the share of those who **want to return home** is 79%, and the share of those who want to stay is 11%; 46% have the opportunity to stay and live in the new place, and 44% do not have it.
- The level of involvement of family members of the respondents 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 did not change and is at 18%.

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

SUMMARY (2/4)

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

- **In the current wave, the main needs of Ukrainians* remain unchanged – the majority of respondents mentioned the need for money (66%), and a third mentioned access to work (33%).** There were no recorded significant changes in needs compared to the previous wave of the study.
- **Subjective assessment of the state of physical and mental health remained unchanged** in the current wave. 46% noted that they have some physical health problems, and 40% noted that they do not have any problems. When it comes to mental health, the situation is similar here – 46% have some problems with their mental state, and 38% indicate that they do not have any such problems.
- Regarding the feeling of safety, about a **third** of the respondents **feel safe at the moment** (there is a significantly larger share of such among those Ukrainians who migrated abroad), while **half of the respondents** (48%) noted that they **feel unsafe from time to time**, and 19% declare that they **do not feel safe**.
- According to those respondents who **had the experience of relocation, the majority of the local population treated them kindly** in the new place (83% of the audience stated so). There were no recorded changes in the current wave.
- 37% of respondents received humanitarian aid from the Ukrainian state, and this indicator is stable in the current wave. Mainly the assistance was in the form of food (76%) and money (43%). Among those who received humanitarian aid, 45% consider it sufficient and 50% – insufficient (among residents of the East, the share of such people is higher and is at 64%).
- When it comes to external migrants, 64% of them received humanitarian aid from the government of the state to which they relocated. Mainly this assistance was in the form of money (85%), food (65%), hygiene and sanitation products (60%), temporary housing (54%) and clothes (53%). The majority of respondents (78%) evaluate this assistance as sufficient.

SUMMARY (3/4)

Perception of the full-scale war with Russia

- In the eighth wave, there were no significant changes in the evaluation of the **effectiveness of the Ukrainian authorities' actions during the war**. The highest evaluations of the effectiveness of the Ukrainian authorities' actions are in the field of military protection of the country from the aggressor (65%) and since the beginning of the war in general (61%). Ukrainians* evaluate the effectiveness of assistance to citizens who have lost their jobs and/or property the lowest: less than a third (29-32%) assess these actions as effective.
- **The Armed Forces of Ukraine (61%), the President of Ukraine (44%), and volunteer organizations (31%)** remain leaders in the rating of trust. Compared to the previous wave, the level of trust in the police has slightly decreased, especially among representatives of the 45-54 age group. At the same time, the trust in the President grew significantly in the South of the country.
- **Ukrainians* continue to be optimistic when it comes to the future of the country** – more than half of respondents believe that Ukraine will be able to build a strong economy, rebuild everything that was destroyed, and become a member of the EU by 2030. If the first two points are characterized by optimism of young people (18-24), then older people (55+) believe in Ukraine's future membership in the EU the most.

SUMMARY (4/4)

Latest news

- **The most important events** of the past week, which respondents **spontaneously mentioned**, were the **nuclear blackmail** at the **Zaporizhzhya NPP** (13% mentioned it), **the missile attack on the Chaplyne station** (11%), and news about the war in general (10%).
- While answering the closed-ended question about important events of the week, **only 10% of respondents could not name any**, while 76% indicated that they knew about Russia's shelling of the Chaplyne railway station in the Dnipropetrovsk oblast, 67% knew about the death of the propagandist Dugin's daughter, 62% knew about the new military aid package from the USA, and 58% knew about newly acquired access to the ICEYE satellite. The least respondents are aware of the "Crimean Platform" summit that was held in Kyiv (41%).
- **The majority** of respondents (76%) indicated that **no event had an impact on their migration intentions**. Most of those who indicated the opposite stated that they have a desire to relocate within Ukraine (46%) or abroad (27%).

Employment during the war

- **In the current wave, the level of employment among Ukrainians remains without significant changes – 59% have a job**. The largest share of employed people is recorded among residents of the Western and Central regions of the country.
- **The majority of employed people (77%) receive payment for their work**, but only 28% of them are confident that they will continue to receive it in the future, while 49% do not have such confidence. The largest share of those who are confident that they will continue to receive a stable salary is recorded among residents of the Western and Central regions.
- When it comes to income since the beginning of the full-scale invasion, the vast **majority** of respondents **declare a decrease in their income (78%)**. The largest share of those who suffered such losses was recorded among internal migrants and the 55+ age group.

UKRAINIANS'* ACTIONS DURING THE FULL-SCALE WAR

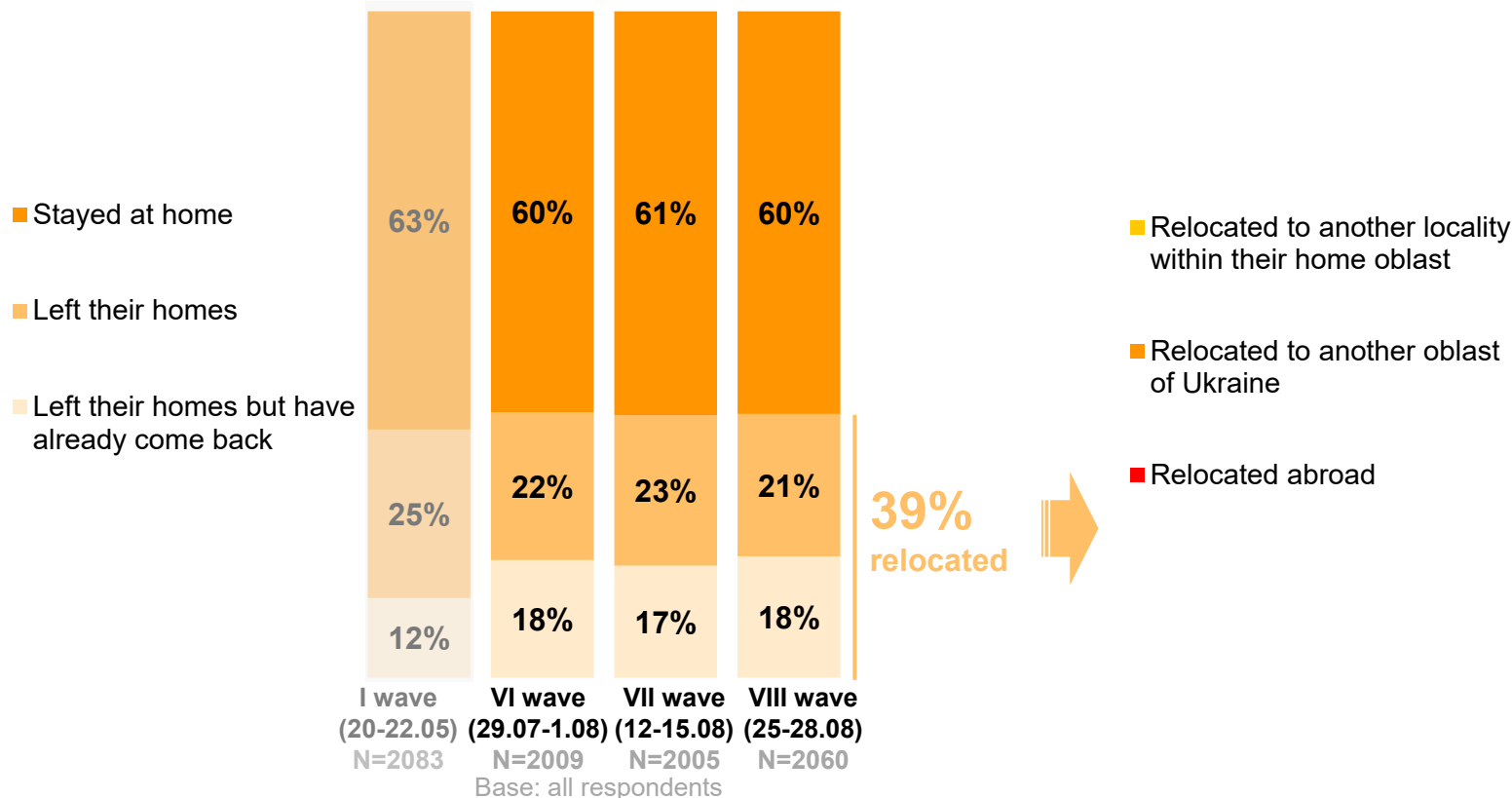
*Ukrainians – residents of cities with population of 50 thousand and more, aged 18+ years, who use smartphones.



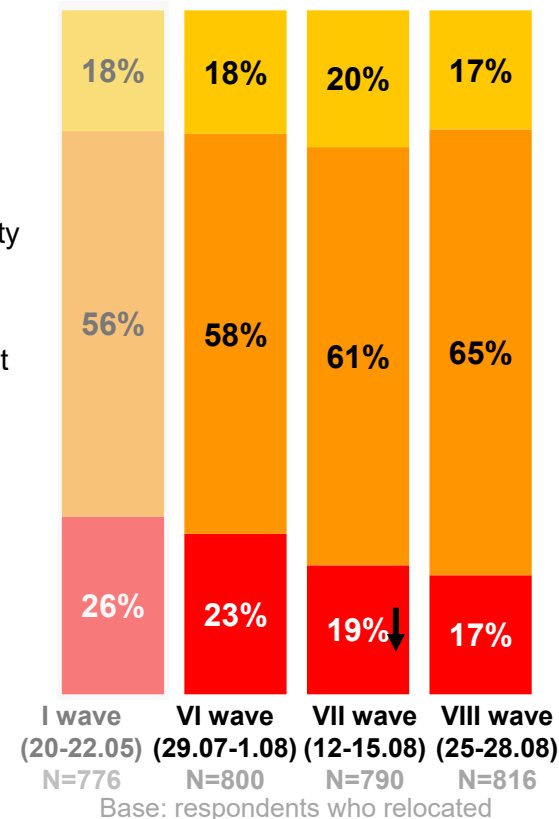
RELOCATION OF UKRAINIANS* DUE TO THE WAR

In the eighth wave, there were no significant differences in the migration patterns of Ukrainians* compared to the previous wave: 60% of respondents stayed at home, 39% changed their place of residence (21% of them continue to stay in their new place, and 18% have already returned). The migration directions also remain unchanged: 17% relocated to another settlement within their oblast, 65% declared migration to another oblast, and 17% – relocation abroad.

Relocation of Ukrainians* due to the war



Relocation specifics



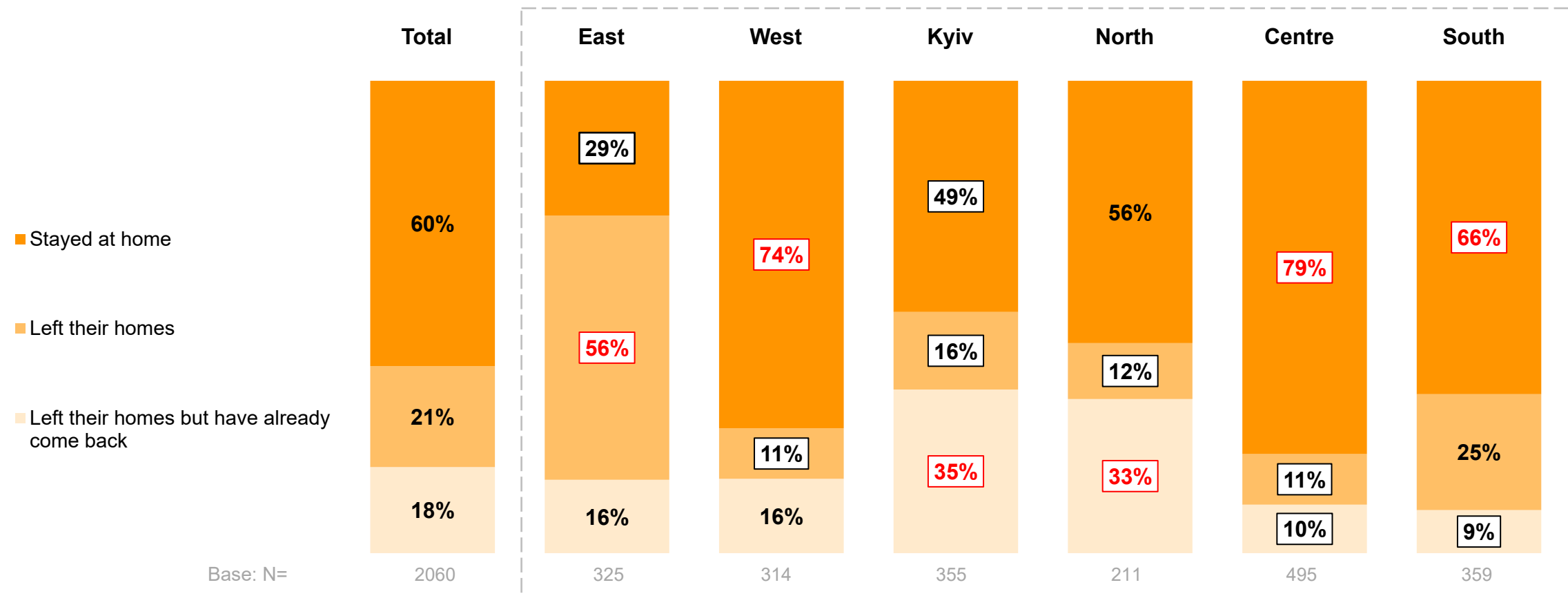
*Ukrainians - residents of cities with population of 50 thousand and more, aged 18+ years, who use smartphones
Which of the following phrases best reflects your actions in the situation of Russia's war against Ukraine:
In which direction were you forced to move:

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

RELOCATION DUE TO THE WAR

by regions

In the eighth wave, regional differences in migration patterns remain without significant changes. Residents of the West, Center and South more often stayed at their permanent place of residence, while residents of the East more often left their homes; at the same time, residents of Kyiv and the North 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

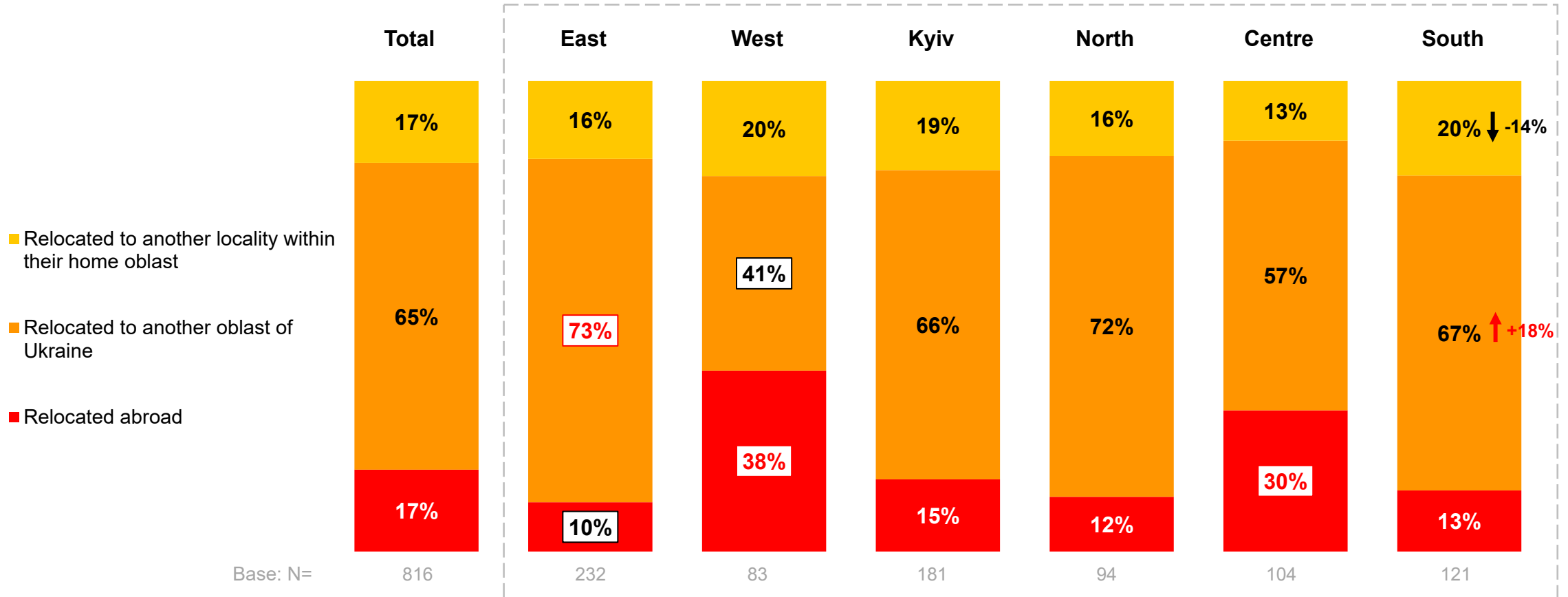
Which of the following phrases best reflects your actions in the situation of Russia's war against Ukraine:

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 were no significant differences between the waves in the regional distribution of migration directions (with the exception of an increase in the share of those who migrated to another oblast among residents of the South, and a corresponding decrease in the share of those who relocated within their own oblast). In general, residents of the West and Center more often relocated abroad (compared to the sample as a whole), while residents of the East more often migrated to another 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

Lviv oblast is the most popular oblast for internal migration.

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 | Odesa oblast | Mykolaiv oblast | Kyiv oblast | Kherson oblast | Rivne oblast | Cherkasy oblast | Lviv oblast | Zhytomyr oblast | Poltava oblast | Ivano-Frankivsk oblast | Vinnitsia oblast | Sumy oblast | |
| Oblast to which relocated (TOP-13) | Lviv oblast | 14% | 18% | 7% | 6% | 2% | 10% | 30% | 0% | 28% | 15% | 21% | 30% | 48% | 0% | 31% | 9% | 22% | 0% | 15% | 52% | |
| | Cherkasy oblast | 9% | 10% | 2% | 2% | 64% | 3% | 6% | 3% | 0% | 4% | 11% | 0% | 0% | 7% | 0% | 18% | 0% | 0% | 0% | 0% | |
| | Zakarpattia Oblast | 8% | 12% | 2% | 4% | 0% | 6% | 10% | 26% | 2% | 0% | 18% | 0% | 0% | 3% | 16% | 60% | 0% | 62% | 0% | 17% | |
| | Vinnitsia oblast | 7% | 9% | 4% | 15% | 0% | 10% | 6% | 20% | 21% | 0% | 9% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | |
| | Ivano-Frankivsk oblast | 7% | 9% | 8% | 5% | 3% | 11% | 6% | 0% | 0% | 0% | 9% | 33% | 0% | 0% | 9% | 0% | 0% | 0% | 15% | 0% | |
| | Chernivtsi oblast | 6% | 1% | 13% | 0% | 6% | 10% | 3% | 0% | 21% | 0% | 0% | 0% | 10% | 21% | 5% | 0% | 48% | 9% | 0% | 0% | |
| | Poltava oblast | 5% | 2% | 21% | 6% | 2% | 8% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 8% | |
| | Dnipropetrovsk oblast | 5% | 1% | 14% | 15% | 0% | 0% | 10% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 7% | 0% | 10% | 0% |
| | Kyiv city | 4% | 0% | 9% | 11% | 2% | 5% | 2% | 23% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 8% | 0% | 0% | 0% |
| | Khmelnitsky oblast | 4% | 6% | 0% | 0% | 8% | 22% | 0% | 0% | 0% | 0% | 15% | 0% | 10% | 0% | 0% | 0% | 0% | 0% | 15% | 0% | |
| | Ternopil oblast | 4% | 4% | 3% | 14% | 0% | 1% | 0% | 0% | 0% | 0% | 0% | 0% | 22% | 10% | 6% | 0% | 4% | 16% | 0% | 0% | |
| | Kyiv oblast | 4% | 0% | 5% | 8% | 7% | 2% | 0% | 5% | 0% | 0% | 7% | 25% | 0% | 22% | 0% | 0% | 0% | 0% | 0% | 0% | |
| | Kirovohrad oblast | 4% | 1% | 5% | 0% | 0% | 2% | 0% | 0% | 0% | 23% | 3% | 12% | 0% | 38% | 0% | 13% | 11% | 0% | 38% | 0% | |
| Base: respondents who relocated to another oblast of Ukraine | | 532 | 119 | 84 | 62 | 37 | 35 | 25 | 24 | 24 | 18 | 18 | 15 | 11 | 11 | 10 | 8 | 7 | 6 | 5 | 5 | |

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.

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

| | | Oblast from which relocated | | | | | | | | |
|--|----------------|-----------------------------|-----------------|----------------|------------------|--------------|-------------------|----------------|-------------|--------------|
| | | Total | Cherkasy oblast | Donetsk oblast | Chernihiv oblast | Rivne oblast | Chernivtsi oblast | Kharkiv oblast | Lviv oblast | Odesa oblast |
| Country to which relocated (TOP-16) | Poland | 31% | 20% | 20% | 45% | 60% | 9% | 40% | 54% | 24% |
| | Germany | 15% | 21% | 15% | 8% | 0% | 16% | 0% | 46% | 0% |
| | Slovakia | 8% | 6% | 41% | 0% | 0% | 4% | 0% | 0% | 0% |
| | Italy | 6% | 1% | 8% | 0% | 14% | 0% | 0% | 0% | 0% |
| | Czech Republic | 3% | 0% | 1% | 10% | 0% | 0% | 0% | 0% | 56% |
| | France | 3% | 4% | 0% | 0% | 0% | 16% | 0% | 0% | 0% |
| | USA | 3% | 6% | 0% | 0% | 0% | 0% | 27% | 0% | 0% |
| | Austria | 3% | 3% | 0% | 11% | 0% | 0% | 16% | 0% | 0% |
| | Netherlands | 3% | 2% | 0% | 16% | 0% | 11% | 0% | 0% | 0% |
| | Lithuania | 2% | 3% | 0% | 0% | 8% | 0% | 0% | 0% | 0% |
| | Turkey | 2% | 4% | 0% | 0% | 0% | 5% | 16% | 0% | 0% |
| | Denmark | 2% | 7% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| | Luxembourg | 2% | 0% | 0% | 0% | 0% | 28% | 0% | 0% | 0% |
| | Greece | 2% | 4% | 0% | 0% | 7% | 0% | 0% | 0% | 0% |
| | Hungary | 2% | 1% | 4% | 0% | 0% | 0% | 0% | 0% | 0% |
| | Spain | 2% | 4% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Base: respondents who relocated to another country | | 142 | 28 | 23 | 13 | 13 | 9 | 7 | 6 | 5 |

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

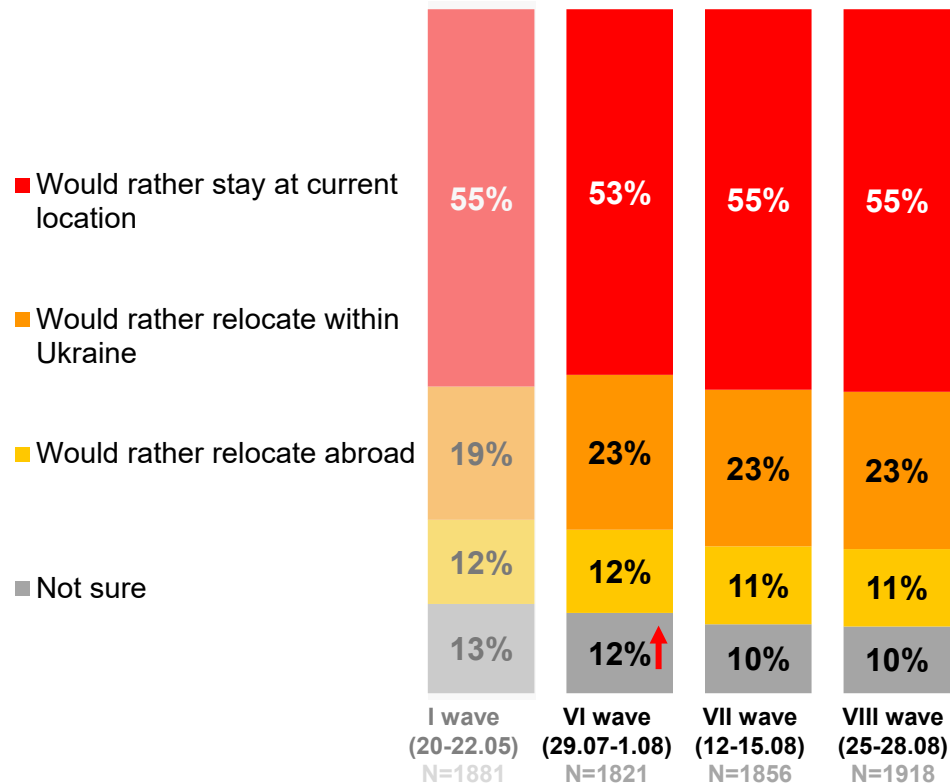
* *Insufficient base for analysis (observation of trend)*

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

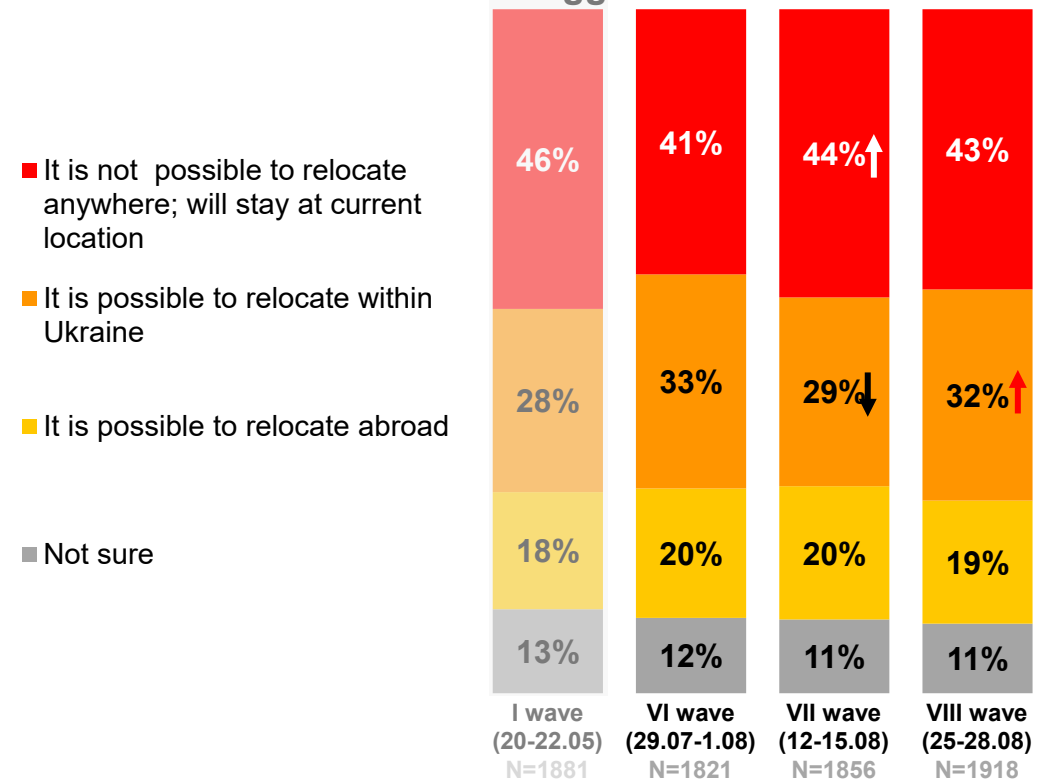
RELOCATION IN CASE OF AGGRAVATION. WISHES & OPPORTUNITIES

Migration attitudes in the event of an aggravation of the situation are generally unchanged – slightly more than half of the respondents have a desire to stay at current location. Also, a fourth part (23%) has a desire to migrate within Ukraine and 11% declare their readiness to relocate abroad. Regarding the opportunity of relocation, 43% do not have this opportunity, and 32% claim that they have the opportunity to relocate within Ukraine (in the current wave, there was a significant increase in this group of people).

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



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



Base: respondents who stayed at home or relocated within Ukraine

In case of further exacerbation, would you rather relocate further away, go abroad or stay where you are now?

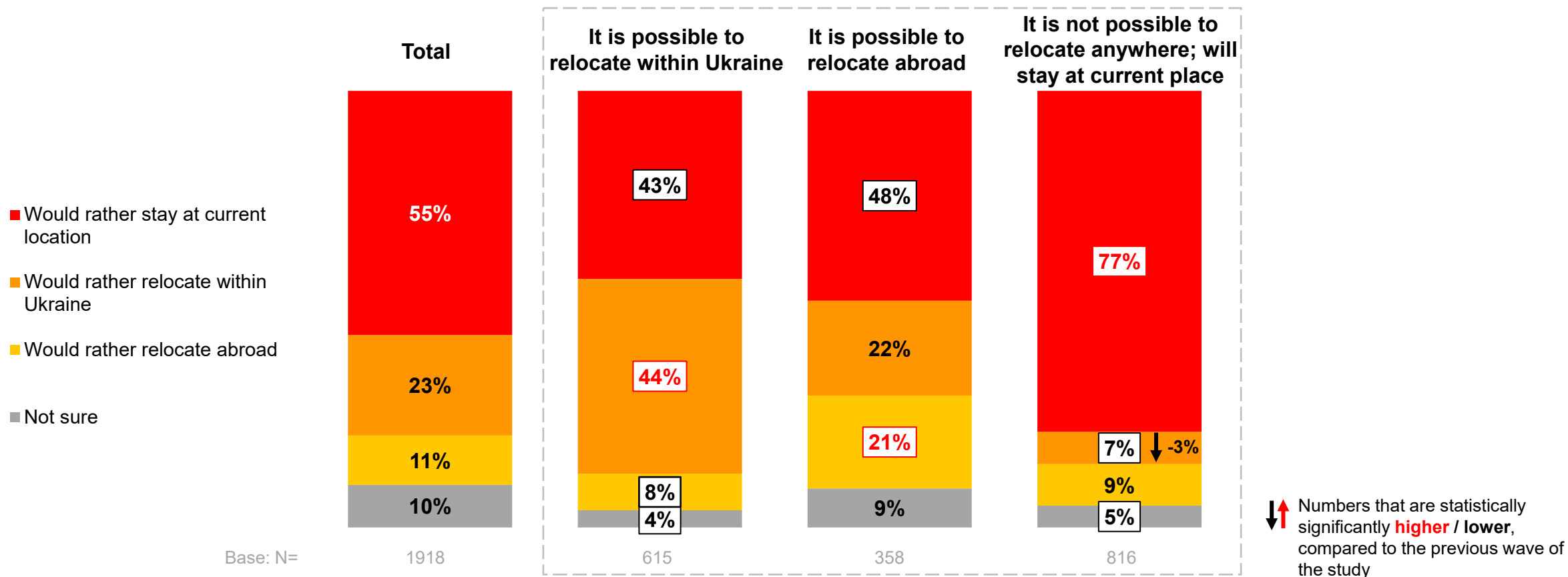
In case of further exacerbation, is it possible for you to relocate further away, go abroad or stay where you are now?

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

RELOCATION IN CASE OF AGGRAVATION. WISHES

by opportunity to relocate

In the current wave, there are no significant differences regarding the desire to relocate depending on the available opportunities.



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.

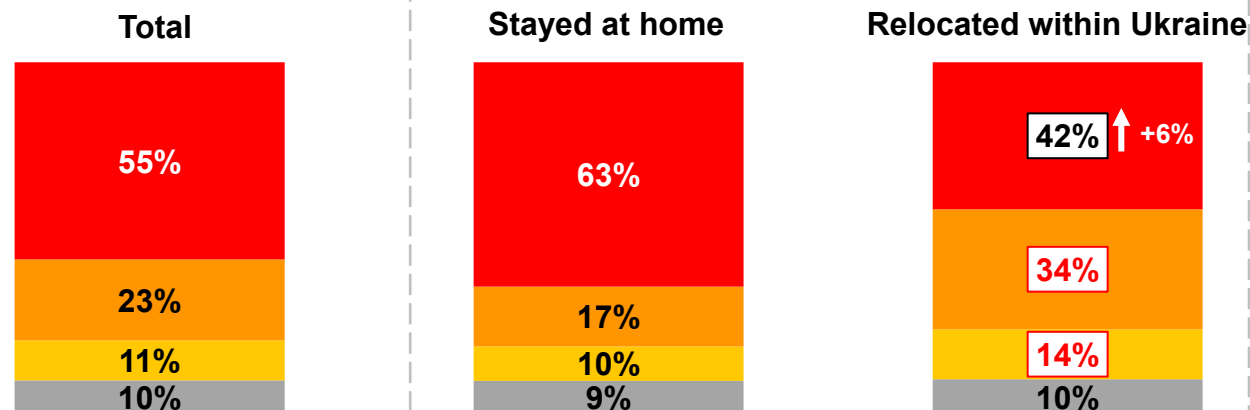
RELOCATION IN CASE OF AGGRAVATION. WISHES & OPPORTUNITIES

by migration status

In the structure of those who relocated within Ukraine, there was an increase in the share of people who want to stay at their current place of residence (from 36% to 42%), and there was a decrease in the share of those who have the opportunity to relocate abroad (from 20% to 15%). Among the respondents in general and those who stayed at home, the share of those who have the opportunity to relocate within Ukraine in the event of an aggravation of the situation has increased. In general, IDPs* more often intend and have the opportunity to change their place of residence within Ukraine in the event of an aggravation of the situation.

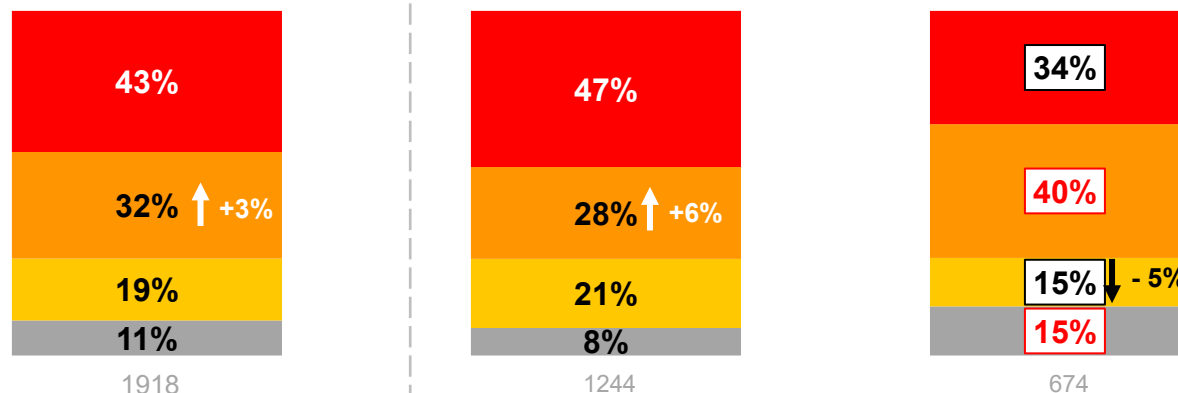
In case of aggravation of the situation **would rather...**

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



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

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



*IDPs – Internally Displaced Persons

Base: N=

1918

1244

674

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



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



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

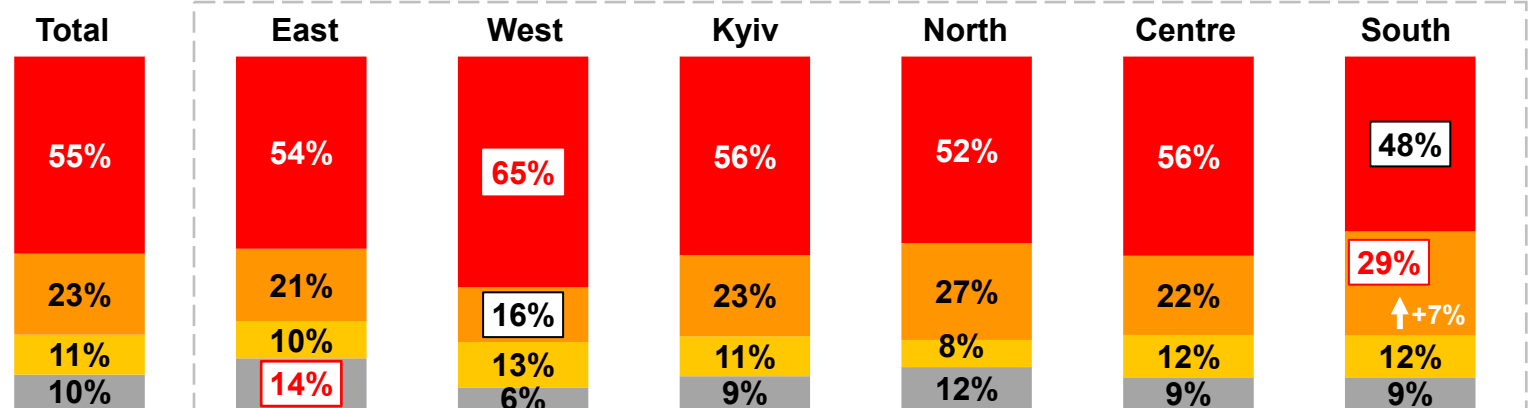
RELOCATION IN CASE OF AGGRAVATION. WISHES & OPPORTUNITIES

by region

As for migration attitudes in the event of an aggravation of the situation by regions, a significantly larger share of the residents of the Western region want to stay in their places (65% vs 55%), while the share of such respondents among the residents of the South is significantly lower (48% vs 55%) and among of this group, there is a recorded increase in the share of those who are ready to relocate within Ukraine (+7% compared to the previous wave). As for the opportunities of relocation, compared to the previous wave, the share of those who have the opportunity to relocate within Ukraine among the residents of the Central, Southern and Western regions has increased significantly.

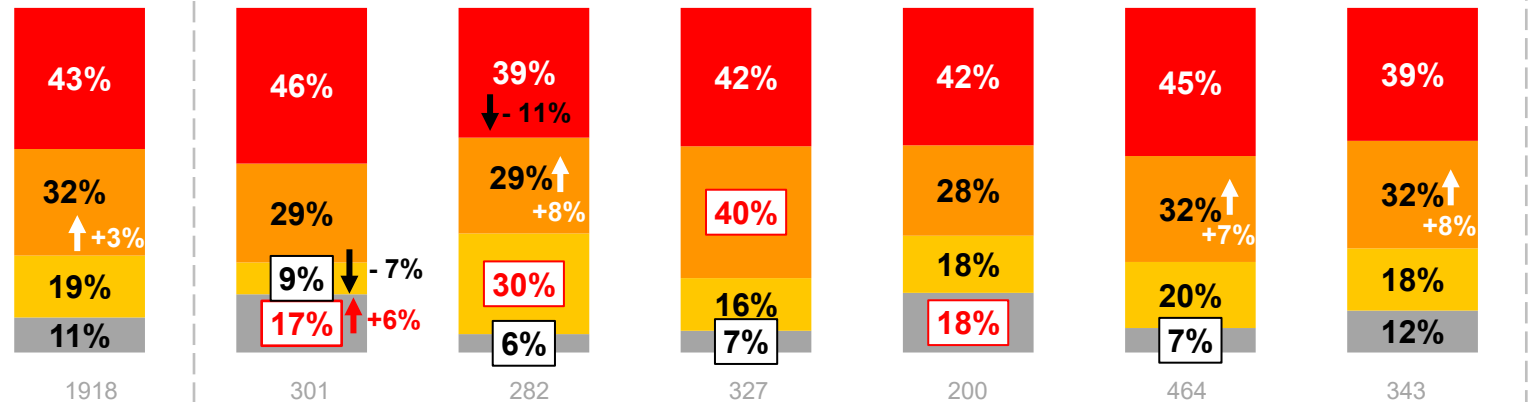
In case of aggravation of the situation **would rather...**

- 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= 1918

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?

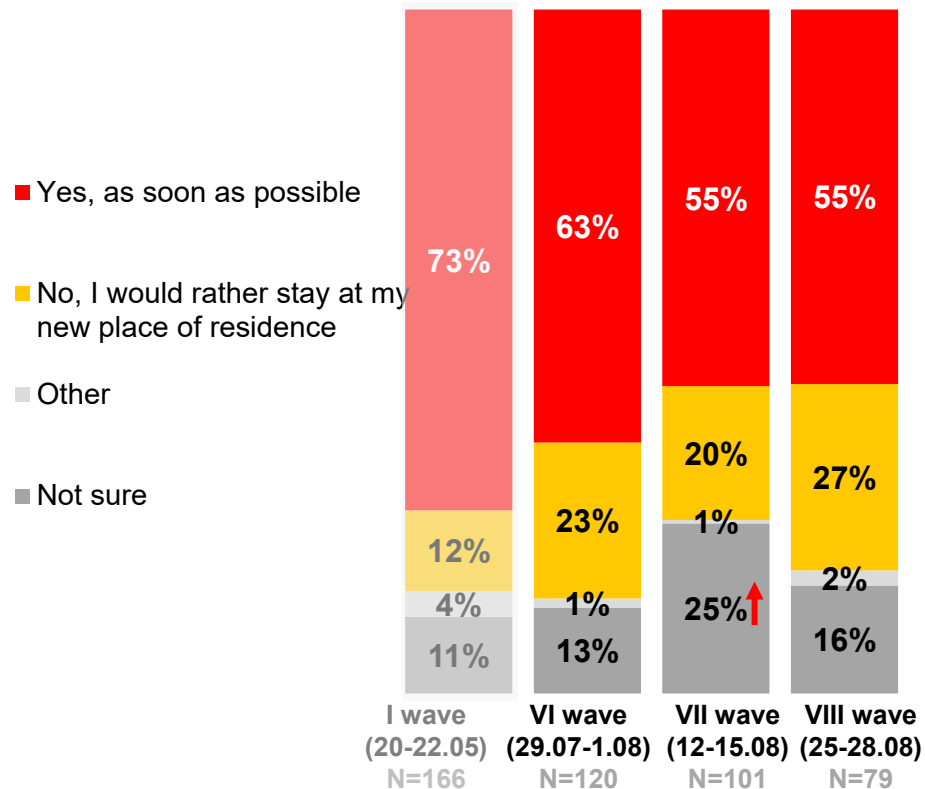
Numbers that are statistically significantly **higher / lower** for a group, compared to the sample as a whole

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

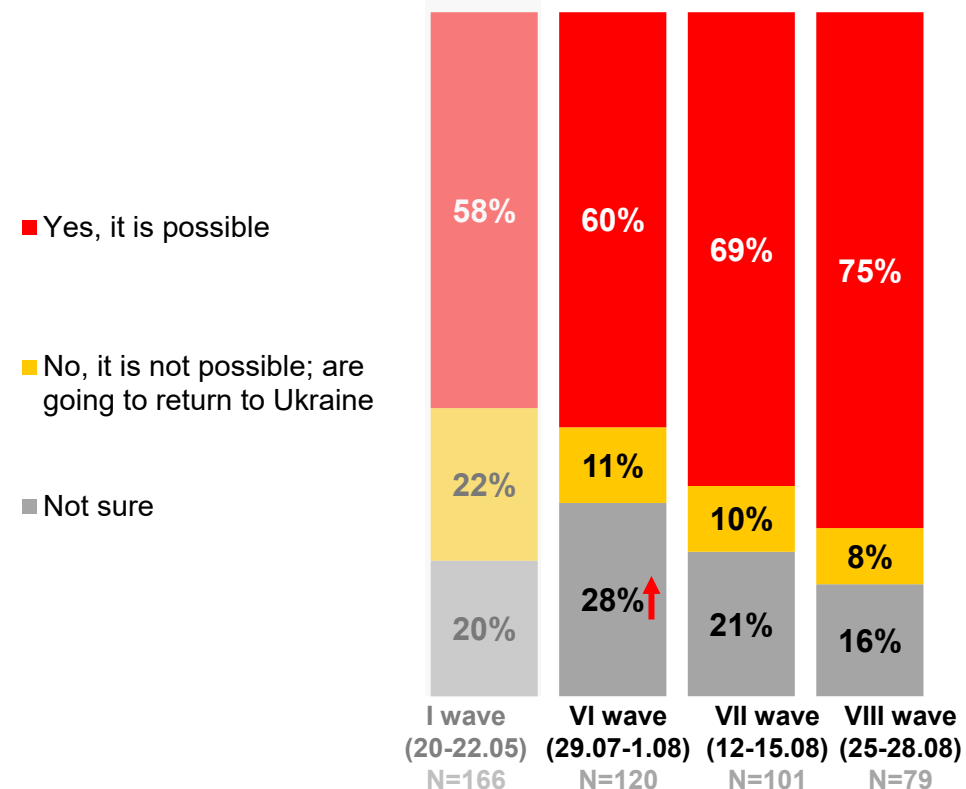
WISHES REGARDING COMING BACK FROM ABROAD. POSSIBILITY OF STAYING THERE

Compared to the previous wave of the study, in the current wave, there were no significant changes in the questions of the desire to return from abroad and the possibility to stay there. In general, 55% of respondents note that they want to return to Ukraine at the first opportunity, while 27% want to stay at their new place of residence. 75% of respondents have the opportunity to stay and live abroad, and 8% 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

The top 3 most popular drivers of returning home among external migrants are a safe situation in the place of residence (mentioned slightly less compared to the previous wave, but still the most frequently mentioned), returning to a normal life and availability of a paid work.

| | V wave (14-18.07) N=116 | VI wave (29.07-1.08) N=120 | VII wave (12-15.08) N=101 | VIII wave (25-28.08) N=79 |
|--|-------------------------------|----------------------------------|---------------------------------|---------------------------------|
| Safety of my locality | 44% | 59% ↑ | 74% ↑ | 58% ↓ |
| Return home (to normal life) | 44% | 50% | 53% | 50% |
| Availability of paid work in Ukraine | 36% | 35% | 50% ↑ | 47% |
| Availability of housing in Ukraine | 33% | 36% | 51% ↑ | 37% |
| Willingness to live and grow in Ukraine | 41% | 30% | 33% | 33% |
| Love for Ukraine | 37% | 26% | 39% ↑ | 32% |
| Availability of development prospects in Ukraine | 22% ↓ | 36% ↑ | 33% | 30% |
| Reunion with my family | 31% ↓ | 25% | 35% | 27% |
| Better access to health care in Ukraine | 20% | 19% | 29% | 20% |
| Resumption of business in Ukraine | 16% | 16% | 15% | 18% |
| Lower cost of living in Ukraine | 18% | 21% | 30% | 16% ↓ |
| Better access to school education in Ukraine* | 9% | 6% | 10% | 9% |
| Better access to high education in Ukraine* | 7% | 2% | 8% | 6% |

*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

As for the main barriers to returning to Ukraine, the situation has not changed significantly. The main restraining factors are the lack of conditions for a safe life (66% chose this reason), absence of paid work (37%), and better living conditions in the host country (28%).

| | V wave (14-18.07) N=116 | VI wave (29.07-1.08) N=120 | VII wave (12-15.08) N=101 | VIII wave (25-28.08) N=79 |
|---|-------------------------------|----------------------------------|---------------------------------|---------------------------------|
| Lack of conditions for a safe life in Ukraine | 65% ↓ | 65% ↑ | 79% | 66% |
| Absence of a paid job in Ukraine | 30% | 30% | 51% | 37% |
| Better living conditions in the country where I currently am | 25% ↑ | 25% | 31% | 28% |
| Absence / loss of residence in Ukraine | 19% | 10% | 17% | 17% |
| Having a paid job in the country where I currently am | 10% | 9% | 27% ↑ | 16% |
| Availability of development prospects abroad | 9% | 17% | 19% ↑ | 15% |
| Inability to go abroad again | 17% | 19% | 18% | 13% |
| Lack of access to quality healthcare in Ukraine | 9% | 5% | 5% | 9% |
| Lack of access to quality education in Ukraine | 10% | 9% | 5% | 6% |
| Availability of residence in the country where I currently am | 5% | 10% | 10% | 5% |

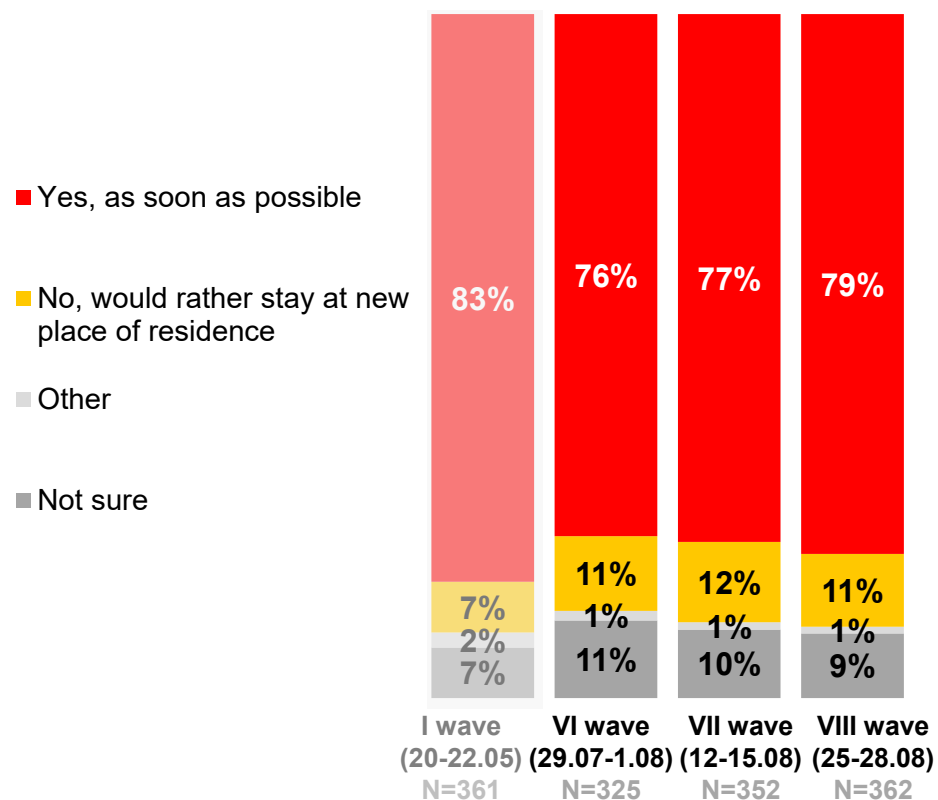
Base: respondents who relocated abroad and have not come back yet
What circumstances are holding you back from returning home?

↓ ↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study 19

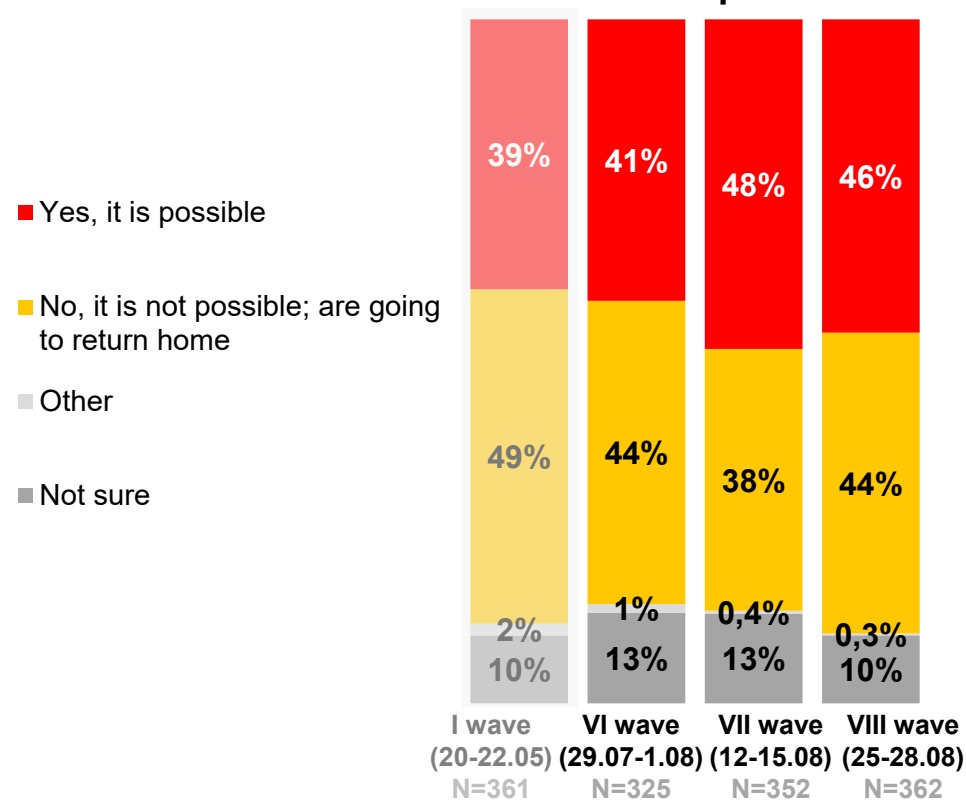
INTERNALLY DISPLACED PERSONS' WISHES REGARDING COMING BACK. POSSIBILITY OF STAYING WHERE THEY ARE

The distribution of answers regarding the desire of IDPs* to change their current place of residence remained unchanged in the eighth wave of the study. Thus, 79% want to return home at the first opportunity, and 11% want to stay and live in a new place. The distribution of answers regarding the possibility of staying in the new place has also not changed significantly – about half (46%) have this possibility, and almost the same amount (44%) claim that they do not have it.

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

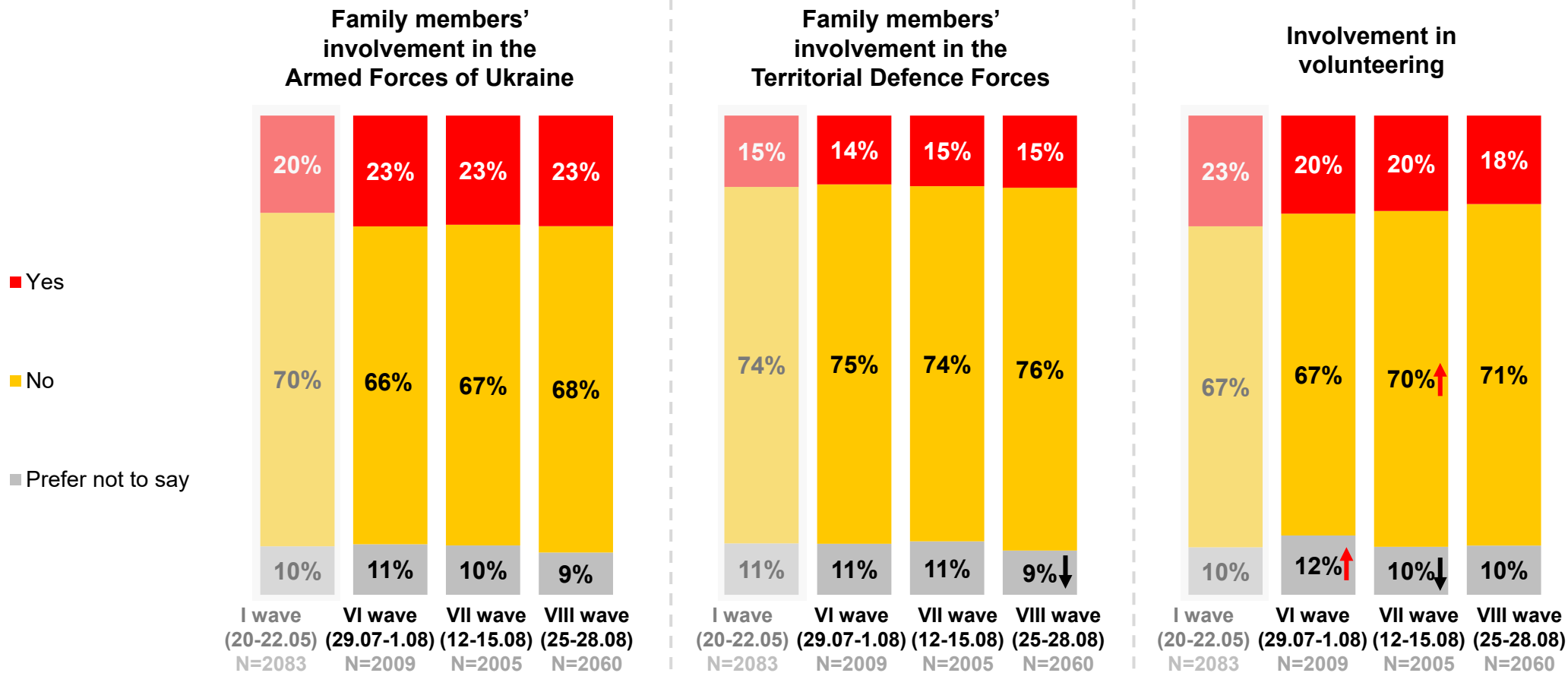
Do you want to return to your permanent place of residence when/if the hostilities there are over?

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 and Territorial Defense Forces remained unchanged in the eighth wave – 23% and 15%. The level of the respondents' own participation in volunteer activities also remained unchanged – 18%.



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?

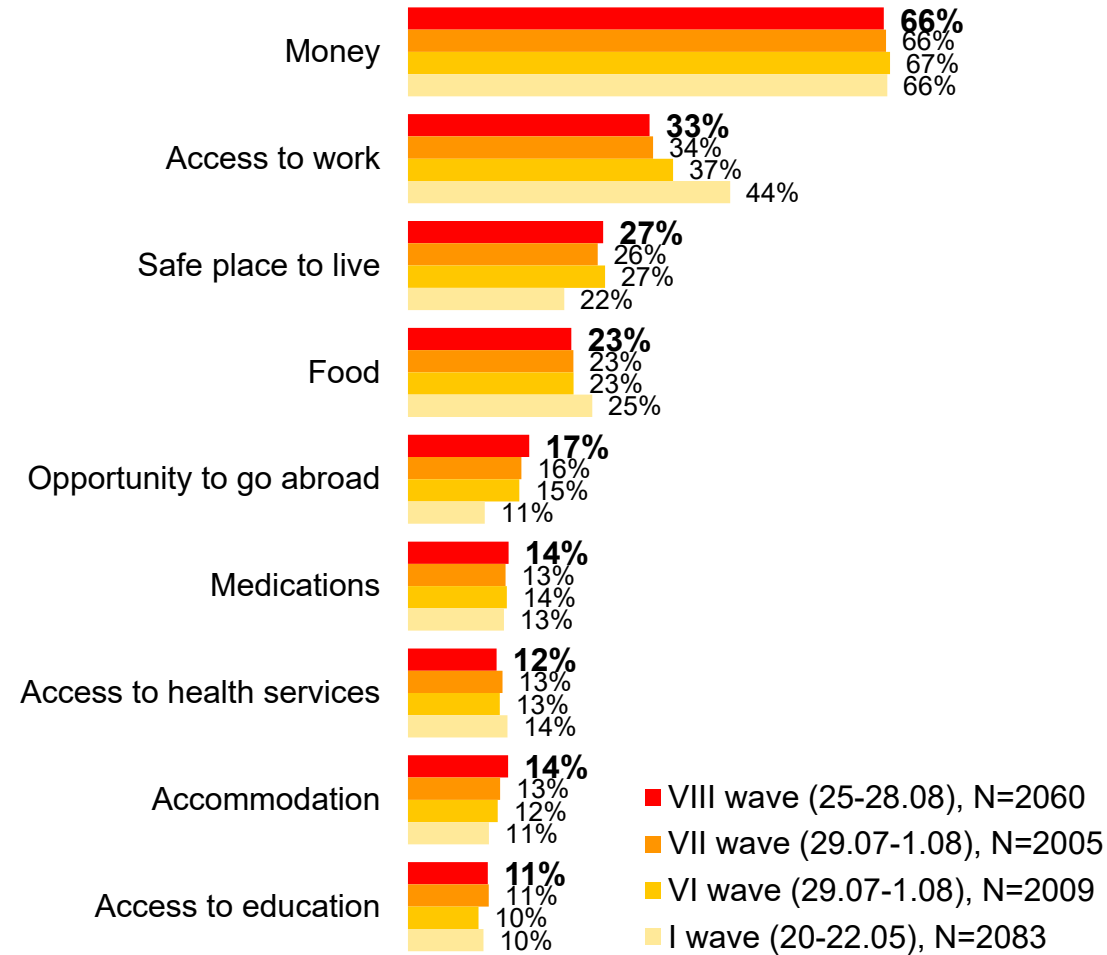
↑ Numbers that are statistically significantly higher / ↓ lower, compared to the previous wave of the study

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 eighth wave, the rating of the needs which respondents and their families feel the most is unchanged compared to the previous wave. More than half of the respondents feel the need for money (66%), and about a third – for access to work (33%).



↑↓ 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. Internal migrants feel greater need for finance, work, food, accommodation and access to health care. Compared to the previous wave, the amount of people who need for money is growing among them. External migrants also significantly more often indicate a need for housing, but less often concerned about financial issues, including access to food, as well as the possibility to relocate abroad.


| | Total | Stayed at home* | Relocated within Ukraine | Relocated abroad |
|---------------------------|-------|-----------------|--------------------------|------------------|
| Money | 66% | 65% | 71% ↑ +5% | 44% |
| Access to work | 33% | 28% | 44% | 30% |
| Safe place to live | 27% | 25% | 31% | 23% |
| Food | 23% | 21% | 27% | 10% |
| Opportunity to go abroad | 17% | 16% | 20% | 7% |
| Medications | 14% | 14% | 14% | 14% |
| Accommodation | 14% | 6% | 26% | 24% |
| Access to health services | 12% | 10% | 16% | 15% |
| Access to education | 11% | 10% | 12% | 12% |
| Base: N= | 2060 | 1244 | 674 | 142 |

*"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 seventh wave, the need for relocation abroad is increasing among people from the Western region, while people from the Northern region feel less need for a "roof" over their heads, and people from the Central region – for food. The largest number of needs are felt by people from the Eastern and Southern regions.

| | Total | East | West | Kyiv | North | Centre | South |
|---------------------------|-------|------|-----------|------|----------|-----------|-------|
| Money | 66% | 74% | 62% | 60% | 67% | 63% | 69% |
| Access to work | 33% | 47% | 25% | 32% | 37% | 25% | 39% |
| Safe place to live | 27% | 35% | 22% | 26% | 23% | 20% | 37% |
| Food | 23% | 34% | 19% | 20% | 22% | 19% ↓ -5% | 24% |
| Opportunity to go abroad | 17% | 16% | 20% ↑ +7% | 16% | 10% | 15% | 21% |
| Medications | 14% | 18% | 13% | 10% | 6% | 12% | 22% |
| Accommodation | 14% | 33% | 9% | 11% | 5% ↓ -6% | 10% | 15% |
| Access to health services | 12% | 17% | 9% | 13% | 5% | 10% | 16% |
| Access to education | 11% | 14% | 7% | 11% | 12% | 12% | 9% |
| Base: N= | 2060 | 325 | 314 | 355 | 211 | 495 | 359 |

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

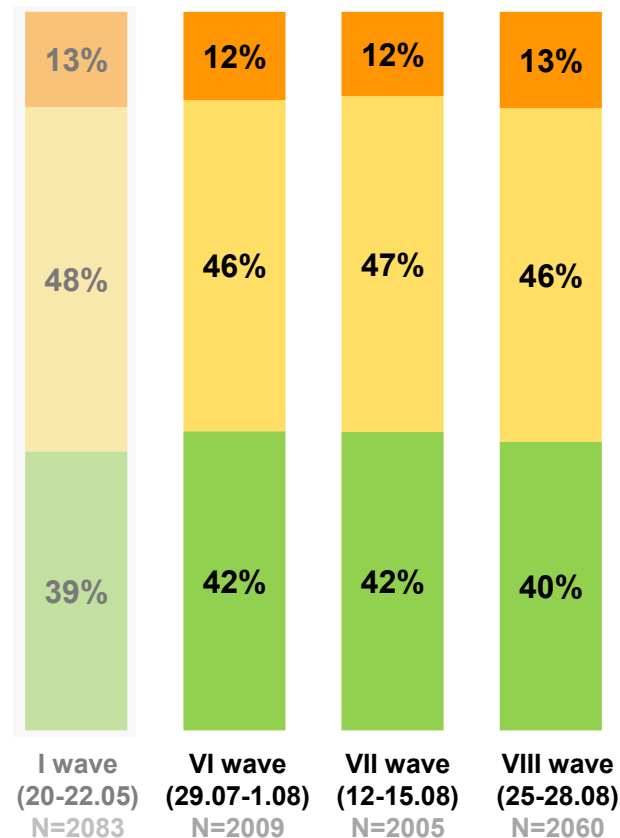
 Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

SUBJECTIVE ASSESSMENT OF HEALTH

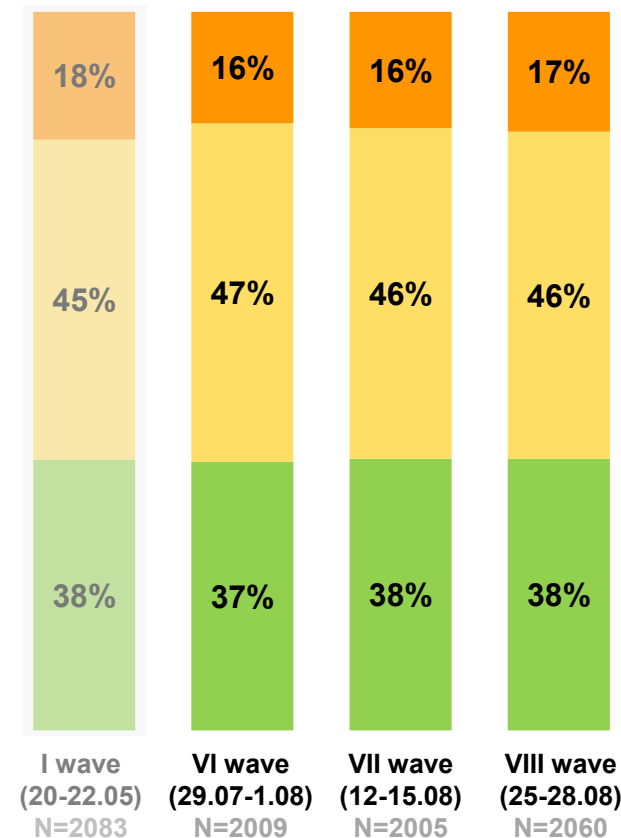
Subjective assessments of the state of physical and mental health remained unchanged compared to the previous wave: about half (46%) of the respondents have some problems, more than a third (40% and 38%) positively assess their state, and 13% & 17%, respectively, have many problems (according to their own declaration).

Physical health status

- Have a lot of health problems (0+1+2+3+4 points)
- Have some health problems (5+6+7 points)
- Have no health problems at all (8+9+10 points)



Mental health status



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

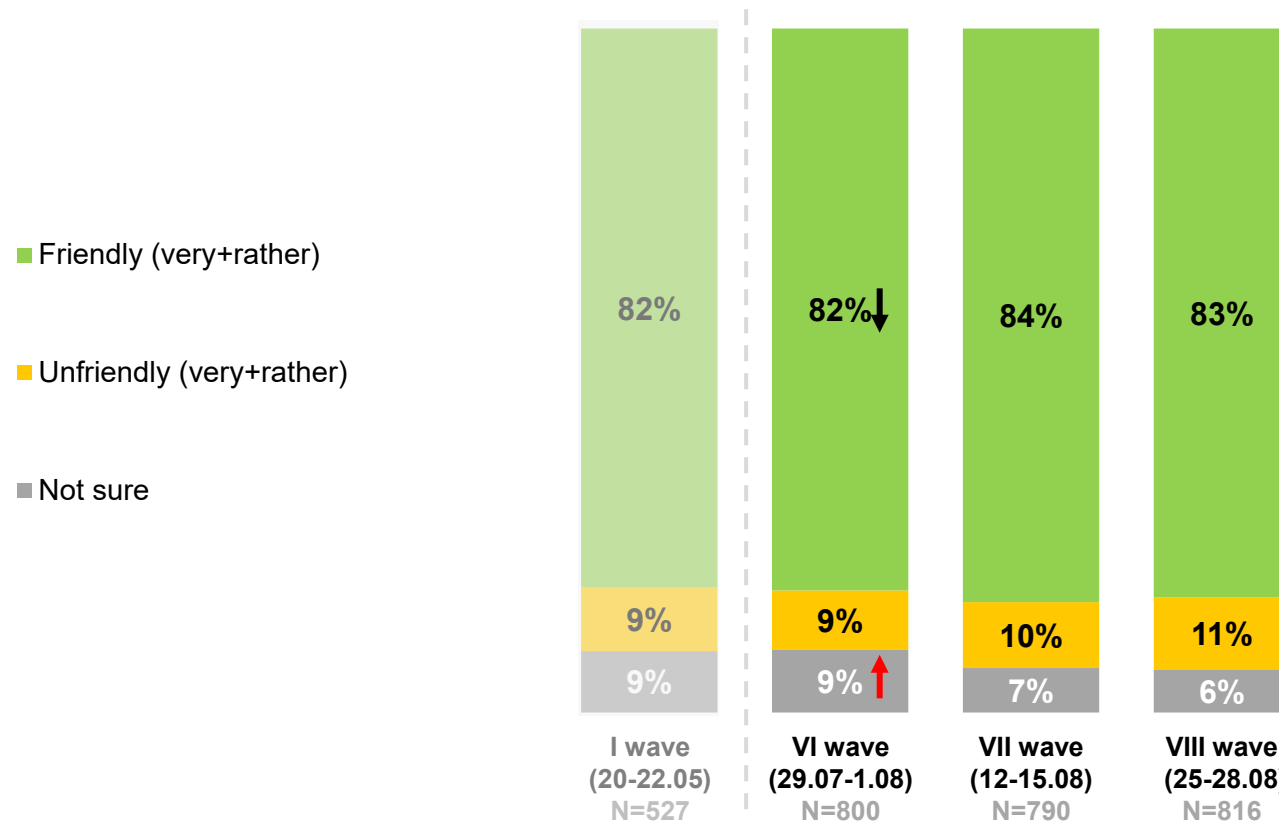
Base: all respondents

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 attitude of the local population in the settlement where the respondents were forced to move due to the war remains at a high level: 83% of the audience that changed their place of residence evaluates 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

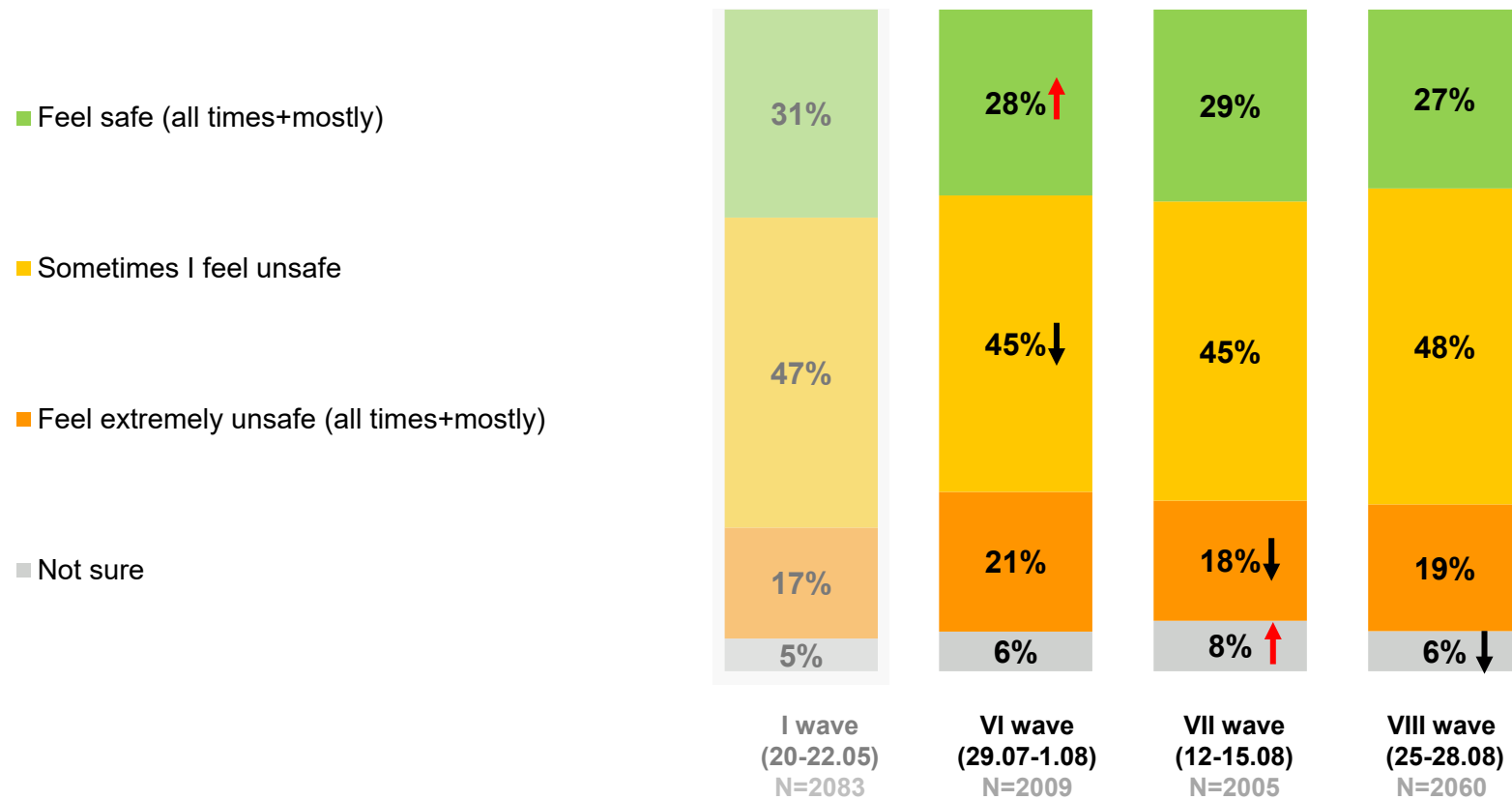
Base: respondents who changed their locations

* 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 seventh wave, there are no significant changes in the feeling of safety, except for the return of the share of those who hesitate to answer to the indicators of the 6th wave.



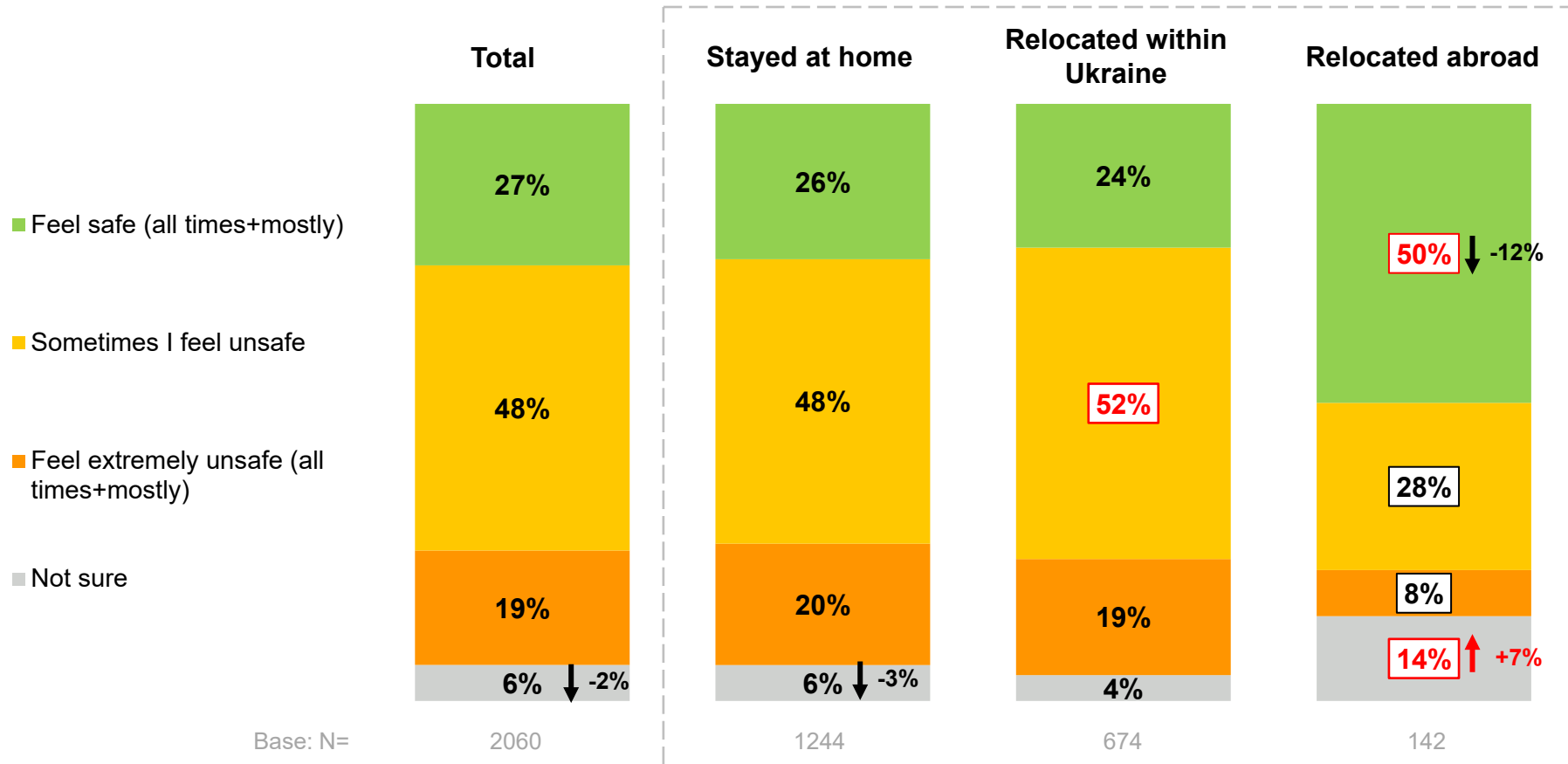
Base: all respondents
Which of the following statements best describes your current state?

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

PERCEIVED SAFETY


by migration status


Among external migrants, the percentage of those who feel safe has decreased significantly, while the percentage of those who hesitate to answer has increased. The share of the latter group decreased in the structure of the group of those who stayed at home.



Base: all respondents

Which of the following statements best describes your current state?

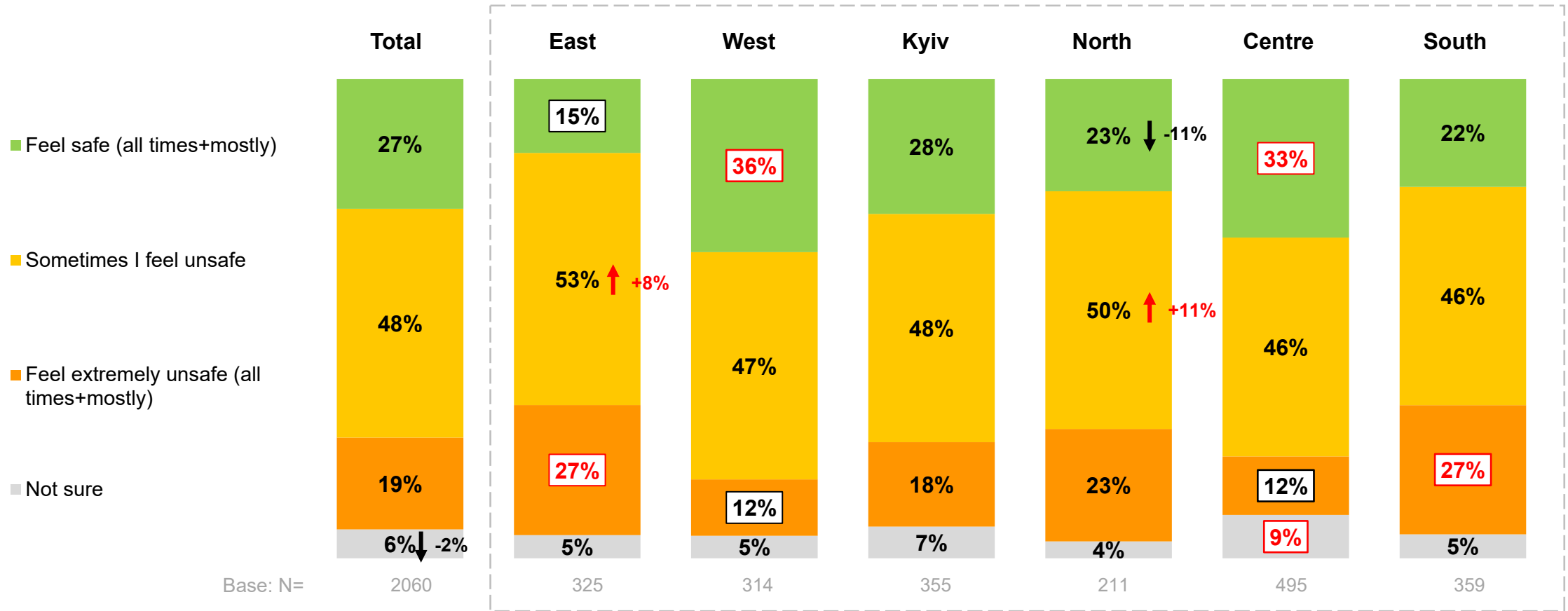
 Numbers that are statistically significantly **higher** / **lower** for the group, compared to the sample as a whole

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

PERCEIVED SAFETY


by region


Compared to the previous wave, there was an increase in the percentage of people from the Eastern and Northern regions who sometimes feel unsafe. In general, the feeling of safety is significantly more often reported by people from the Western and Central regions.



Base: all respondents

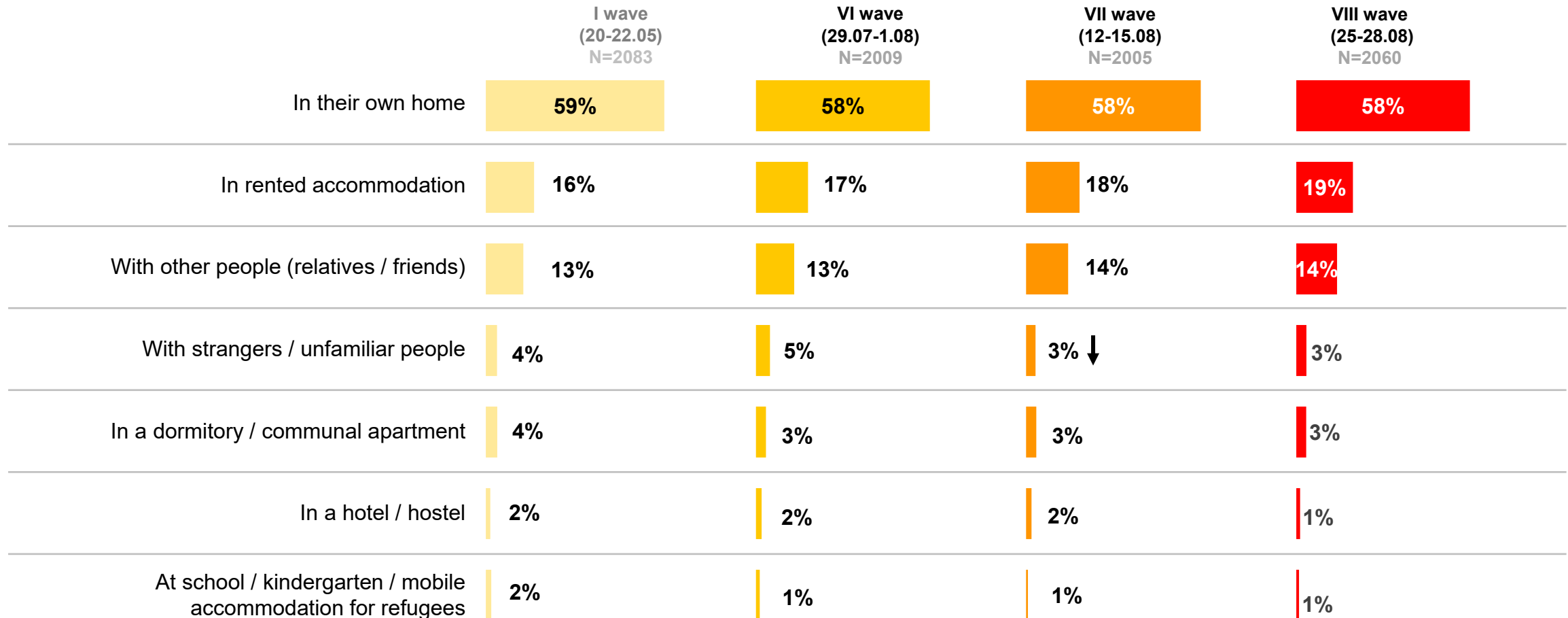
Which of the following statements best describes your current state?

 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

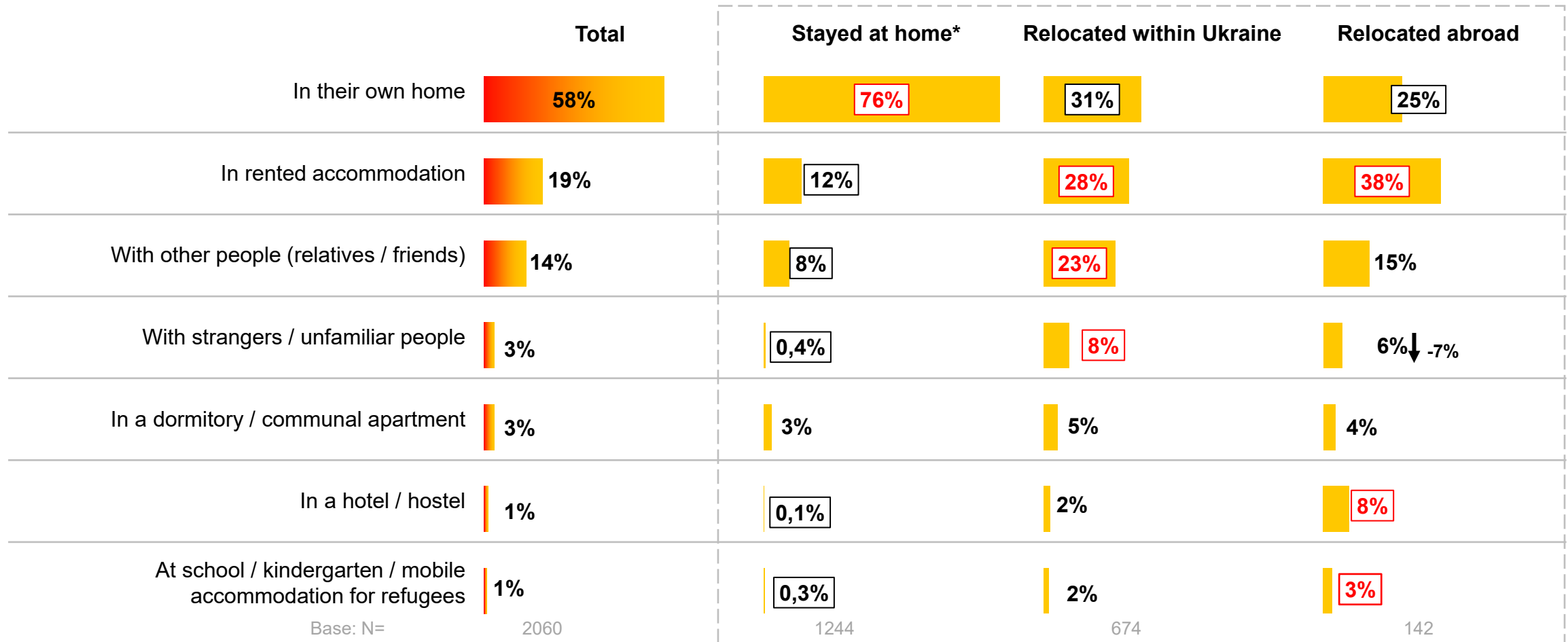
Indicators of the current place of residence remained unchanged compared to the seventh wave. 58% of respondents continue to live in their own apartment. Also common places of residence are rented housing (18%) and housing of relatives / acquaintances (14%).



CURRENT RESIDENCE

by migration status


Compared to the previous wave, the share of external migrants who live with strangers or unfamiliar people has decreased.




*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

The smallest percentage of those who live in their own home is among people from the East, at the same time among them there are significantly more people who rent accommodation or live with other people (both acquaintances and strangers). Compared to the previous wave, the percentage of those who live in a hotel / hostel among residents of the East and those who live with strangers among residents of the South decreased.

| | Total | East | West | Kyiv | North | Centre | South |
|--|-------|----------|------|------|-------|--------|----------|
| In their own home | 58% | 27% | 71% | 61% | 67% | 65% | 56% |
| In rented accommodation | 19% | 33% | 14% | 17% | 16% | 16% | 19% |
| With other people (relatives / friends) | 14% | 19% | 10% | 13% | 10% | 12% | 16% |
| With strangers / unfamiliar people | 3% | 10% | 2% | 2% | 2% | 3% | 1% ↓ -4% |
| In a dormitory / communal apartment | 3% | 5% | 2% | 5% | 3% | 2% | 3% |
| In a hotel / hostel | 1% | 1% ↓ -3% | 1% | 1% | 1% | 1% | 3% |
| At school / kindergarten / mobile accommodation for refugees | 1% | 3% | | 1% | 0,5% | | 1% |
| Base: N= | 2060 | 325 | 314 | 355 | 211 | 495 | 359 |

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

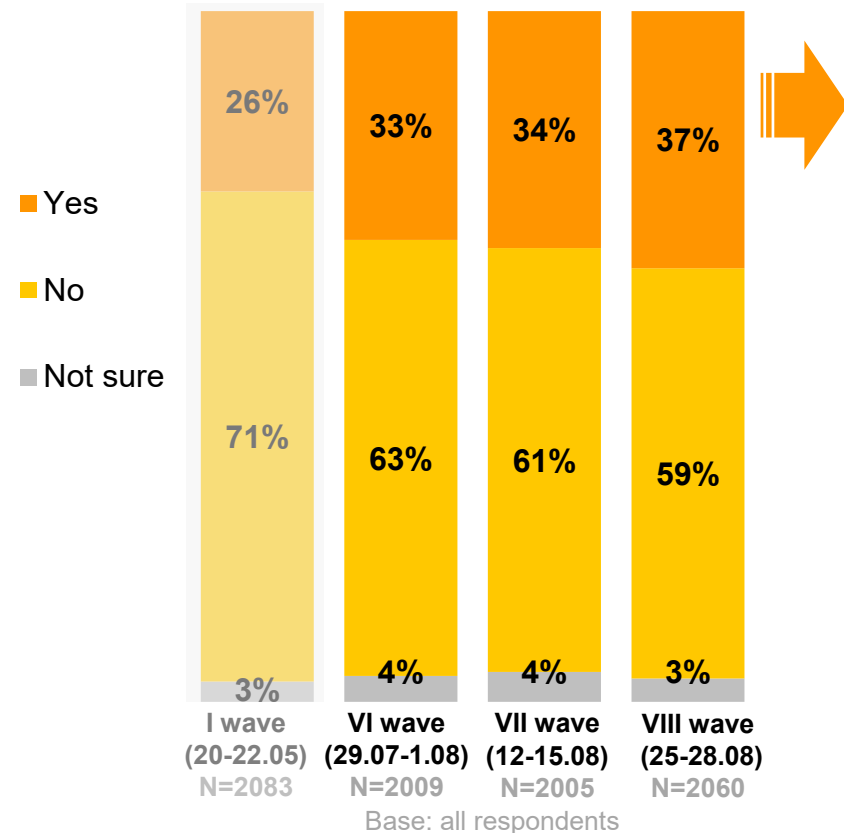
 Numbers that are statistically significantly **higher** / **lower** for the group, compared to the sample as a whole

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

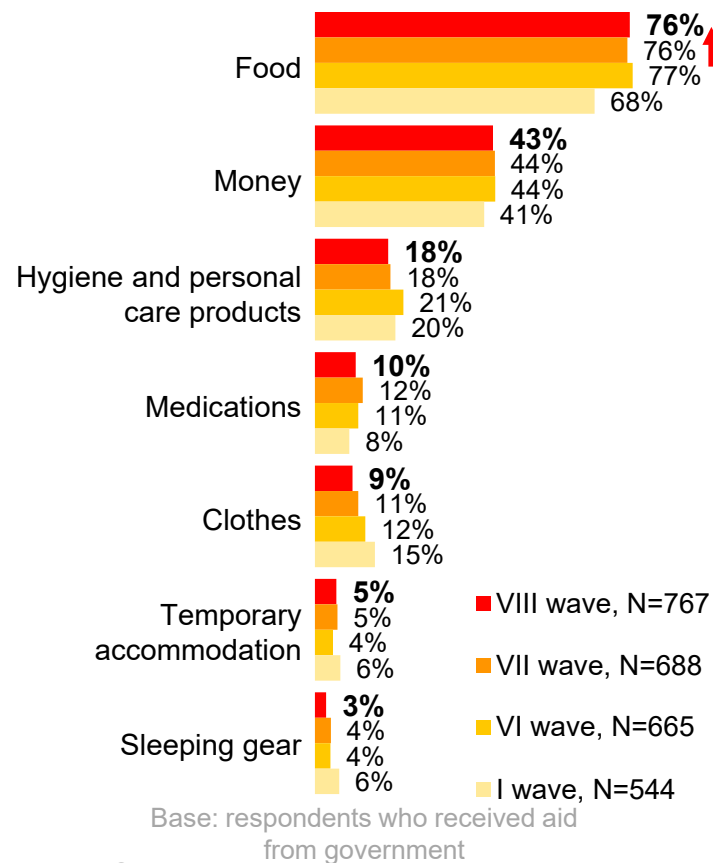
HUMANITARIAN AID FROM THE UKRAINIAN GOVERNMENT

The percentage of respondents receiving humanitarian aid from the Ukrainian state is gradually increasing, but without significant differences compared the previous wave – 37%. The most popular form of aid is food (76%) and money (43%). 45% of recipients consider the received assistance as sufficient.

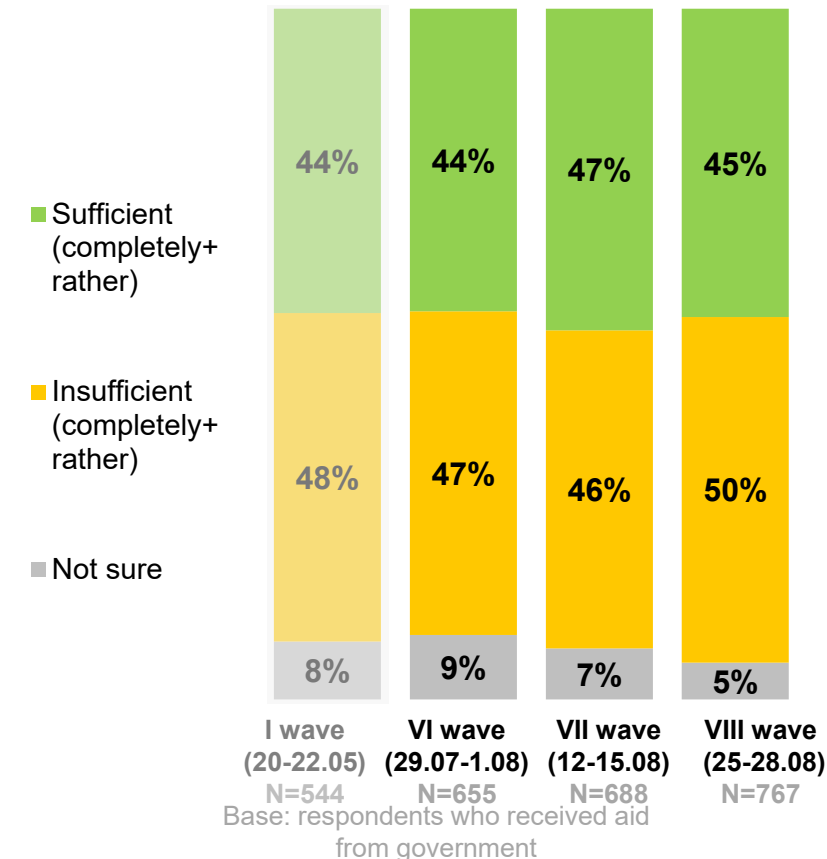
Reception of humanitarian aid from the government



Type of humanitarian aid



Sufficiency of the humanitarian aid



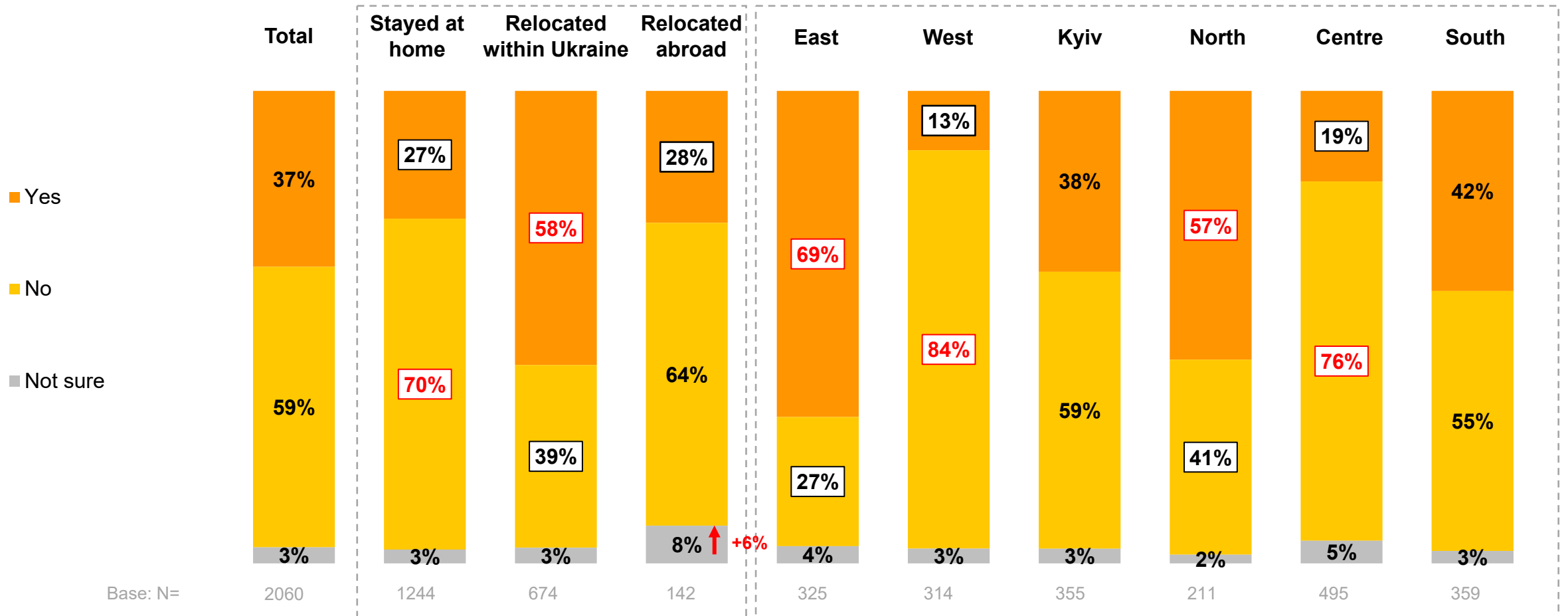
Have you or your family received humanitarian aid from the Ukrainian government?
 What kind of humanitarian aid did you or your family receive from the Ukrainian government?
 How would you assess the humanitarian aid provided to you or your family by the Ukrainian government?

↓↑ 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

There were no recorded significant differences in migration and regional groups, compared to the previous wave. Humanitarian aid from the Ukrainian state is mostly received by IDPs from the Eastern and Northern regions. The smallest amount of recipients are among the group of external migrants, those who stayed at home, and among people from the Western and Central regions.



Base: N=

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

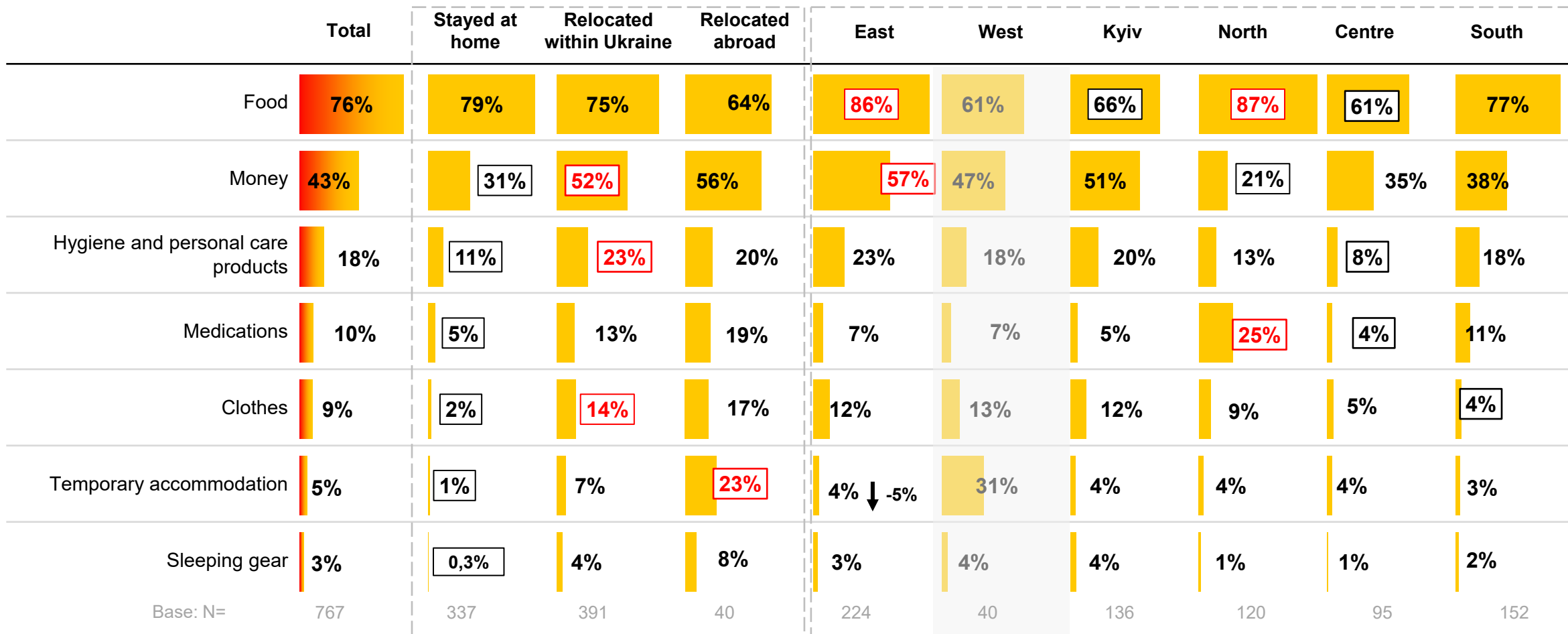
□ Numbers that are statistically significantly higher / lower for the group, compared to the sample as a whole

Base: all respondents
Have you or your family received humanitarian aid from the Ukrainian government?

TYPE OF HUMANITARIAN AID RECEIVED FROM THE UKRAINIAN GOVERNMENT

by migration status and region

Compared to the previous wave, among the residents of the East, the share of people who received aid from the Ukrainian state in the form of temporary housing decreased. In general, IDPs significantly more often received money, hygiene products, clothes, while external migrants more often received temporary shelter.



* 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?

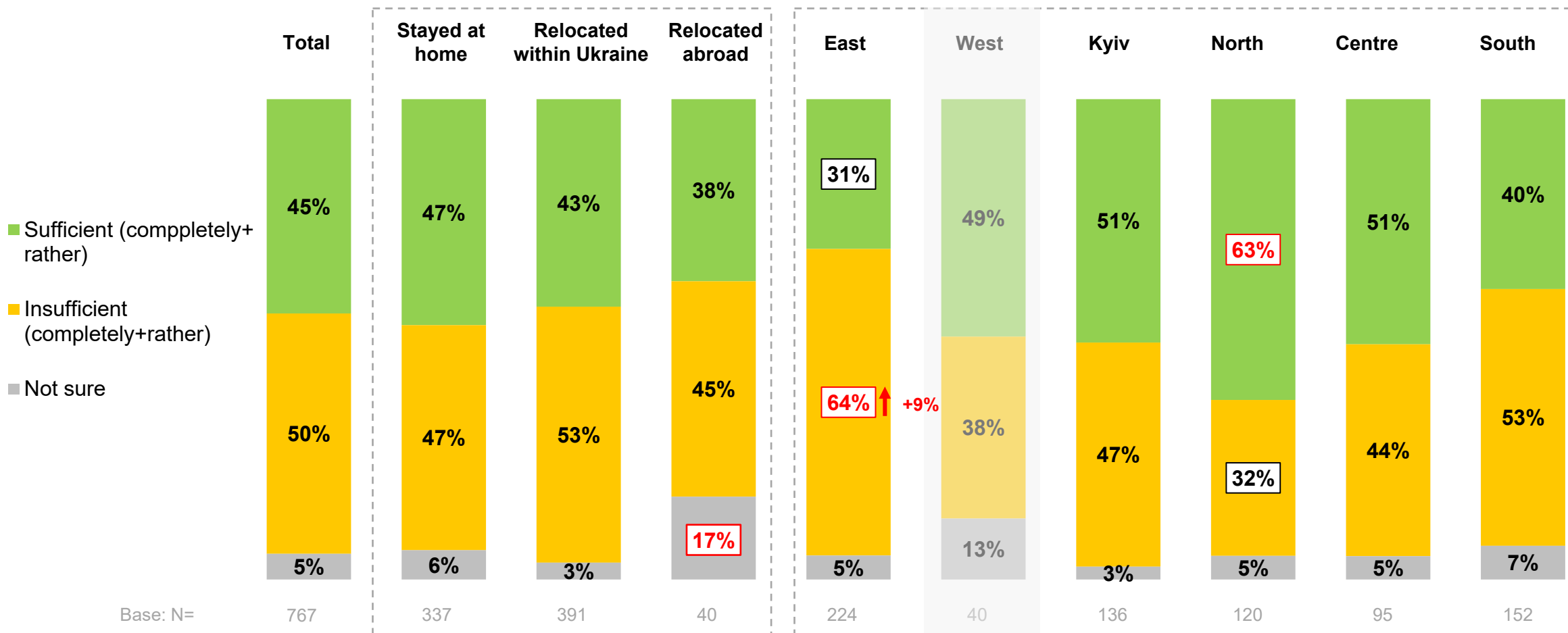
↑ Numbers that are statistically significantly higher / lower, compared to the previous wave of the study

▣ 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

Compared to the previous wave, there are significantly more people from Eastern Ukraine who receive humanitarian aid from the Ukrainian state consider it insufficient.



* 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?

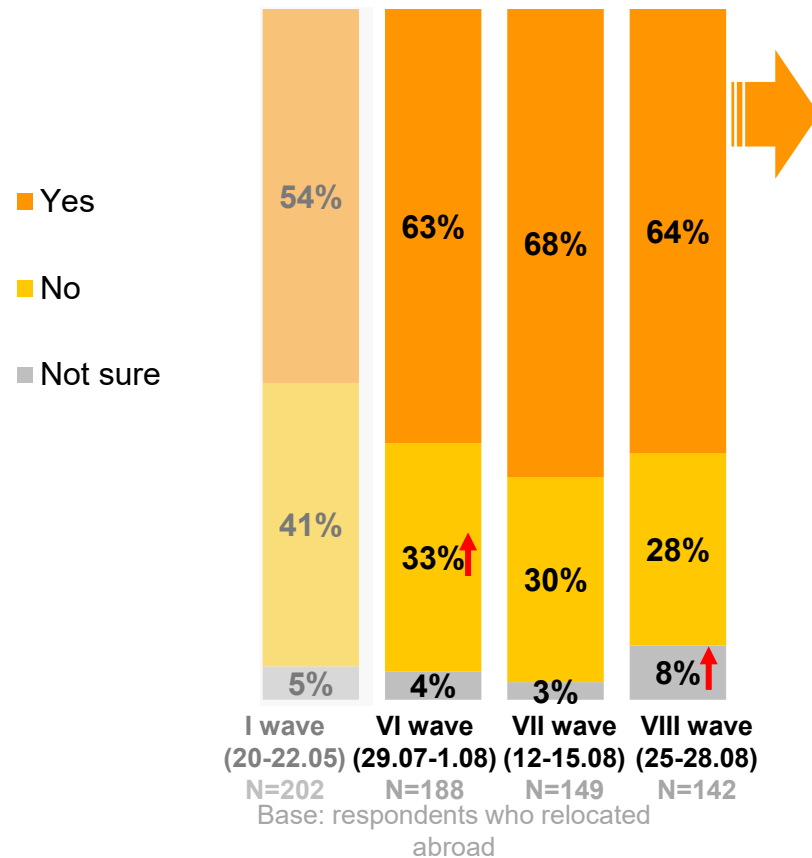
↑ Numbers that are statistically significantly higher / lower, compared to the previous wave of the study

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

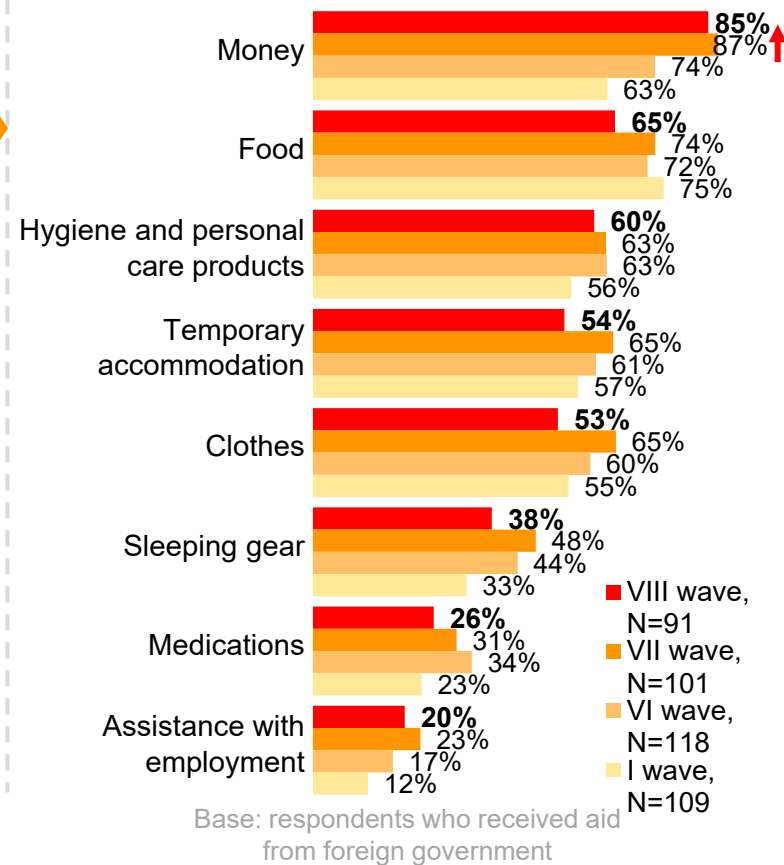
HUMANITARIAN AID FROM THE FOREIGN GOVERNMENT

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 at 64%. Among those who received it, 78% evaluated it as sufficient (at the level of the previous wave). In general, more than half of them report receiving money (85%), food (65%), hygiene products (60%), temporary housing (54%) and clothes (53%).

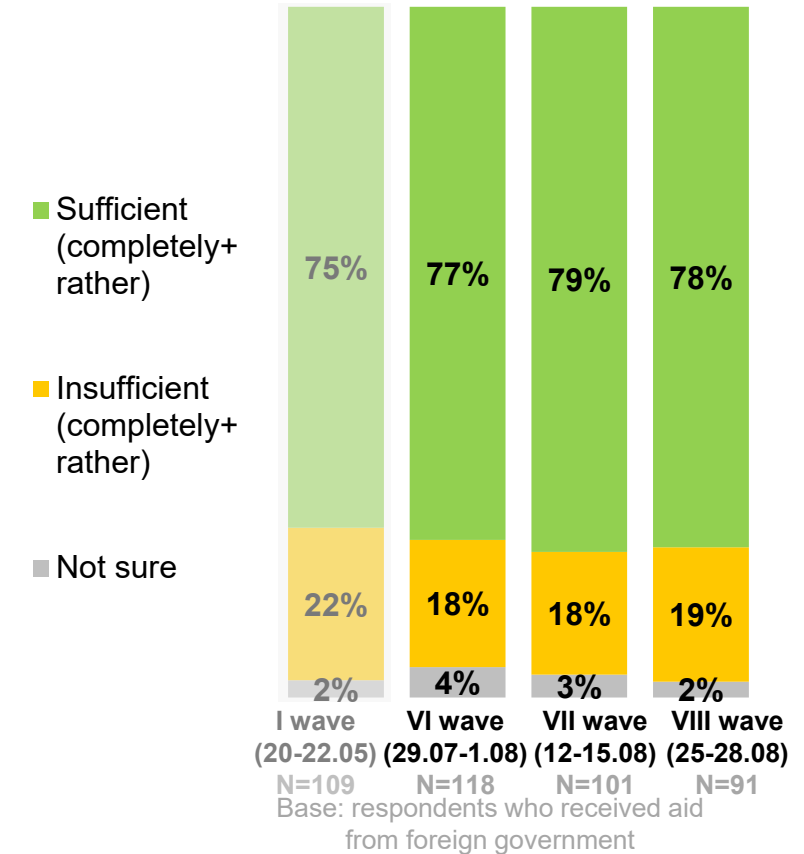
Reception of humanitarian aid from the government



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?

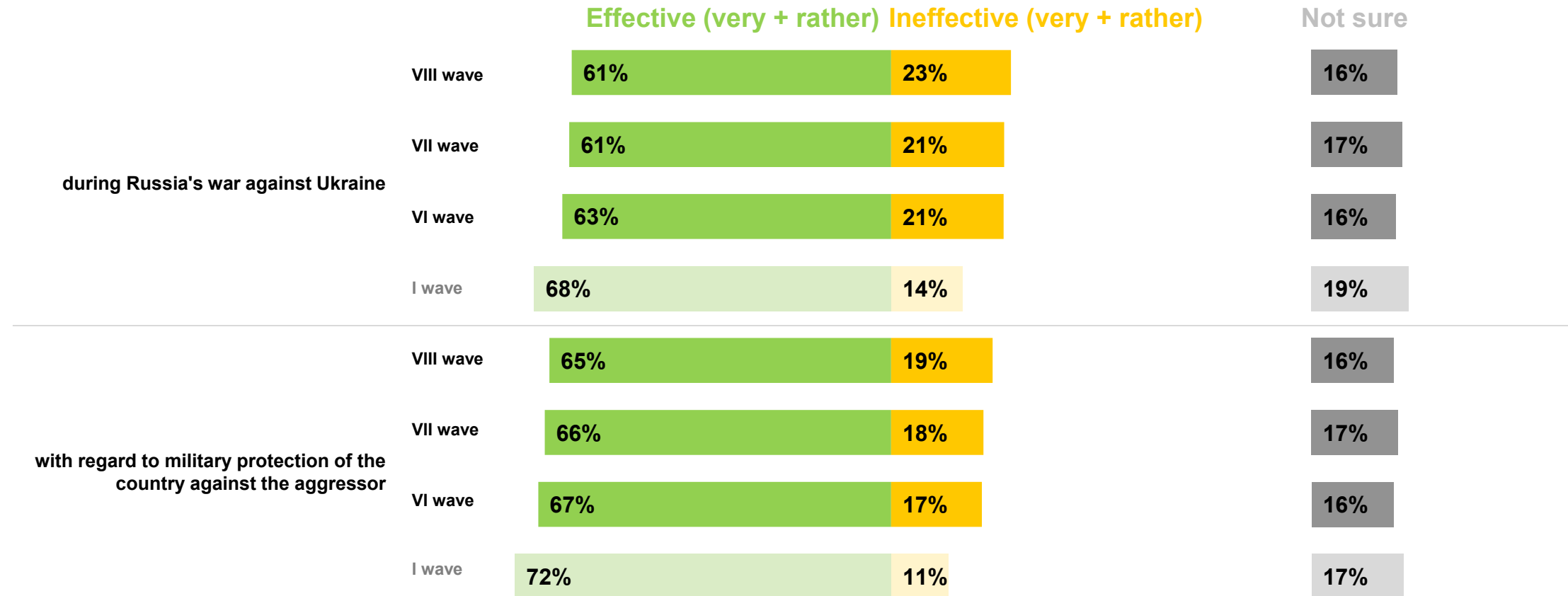
↑ ↓ Numbers that are statistically significantly higher / lower, compared to the previous wave of the study

**PERCEPTION OF THE
FULL-SCALE WAR WITH
RUSSIA**



EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES...

In the eighth wave, there were no significant changes in the assessment of the effectiveness of the Ukrainian authorities' actions both since the beginning of the war in general and in the field of military protection: more than half of respondents consider them effective (61% and 65%, respectively). Representatives of the older age group (55+) are most inclined to think so.



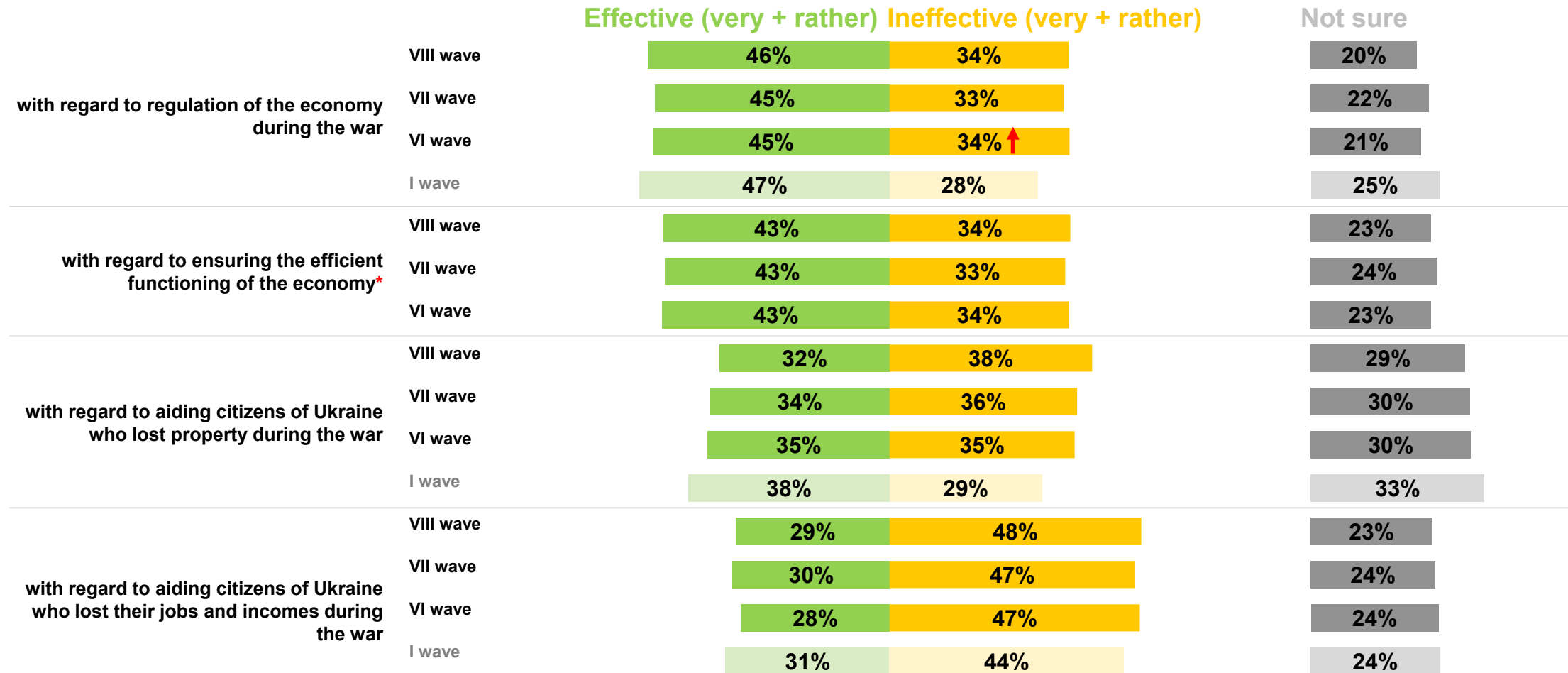
Base: all respondents; I wave – N = 2083, VI wave – N = 2009, VII wave – N = 2005, VIII wave – N = 2060.

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...

The assessment of the actions of the Ukrainian authorities with regard to the economy and assistance to citizens in general remains without significant changes. The share of internally displaced persons who consider actions to help those who lost their property to be ineffective has increased; in turn, among the people from the East, there was a decrease in the share of those who consider them effective.



Base: all respondents; I wave – N = 2083, VI wave – N = 2009, VII wave – N = 2005, VIII wave – N = 2060.

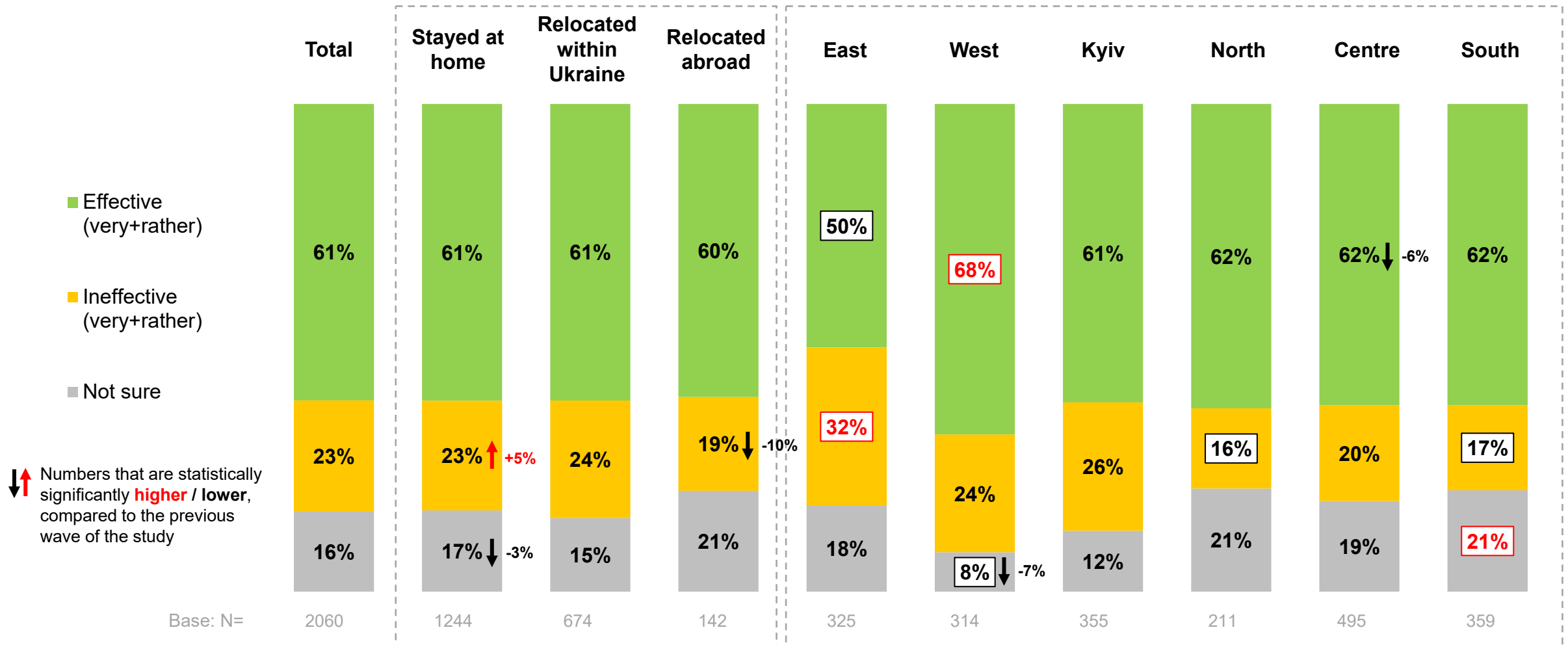
How effective do you consider the actions of the Ukrainian authorities: with regard to regulation of the economy during the war / with regard to ensuring the efficient functioning of the economy* / with regard to aiding citizens of Ukraine who lost property during the war / with regard to aiding citizens 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



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

Numbers that are statistically significantly higher / lower for a group, 42 compared to the sample as a whole

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

during Russia's war against Ukraine

by age



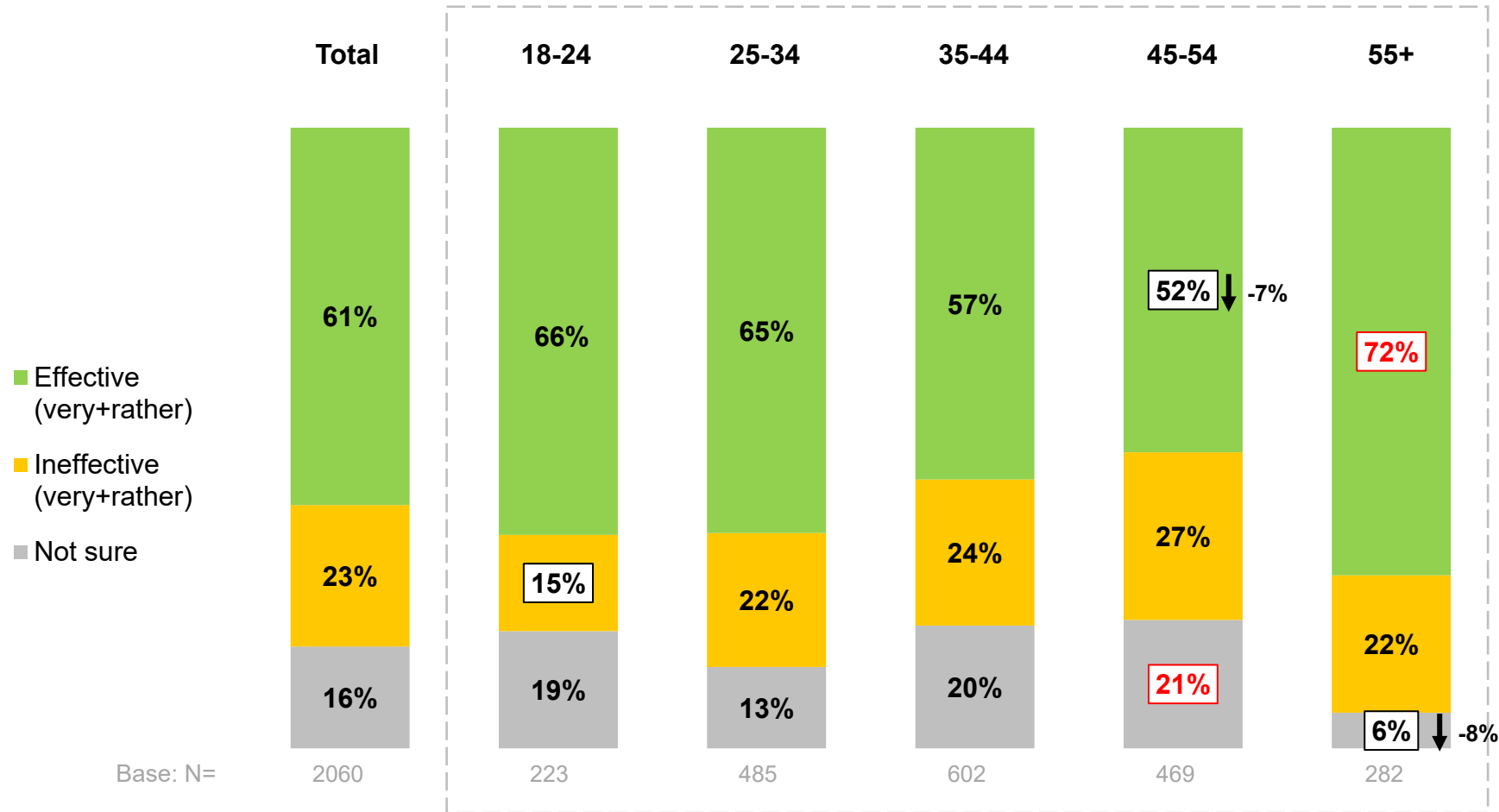
MOVING FORWARD TOGETHER



Centre for Economic Recovery



Advanter



Base: N=

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

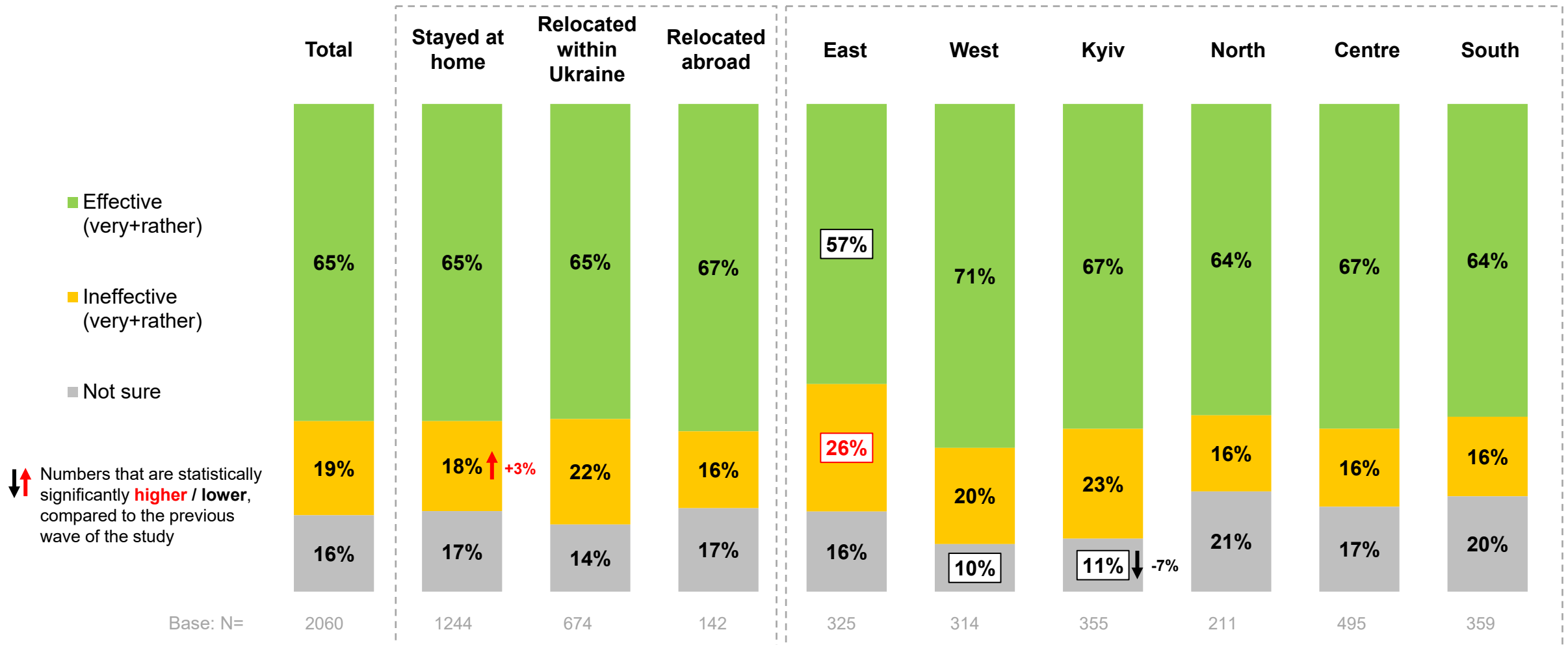
▭ Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

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

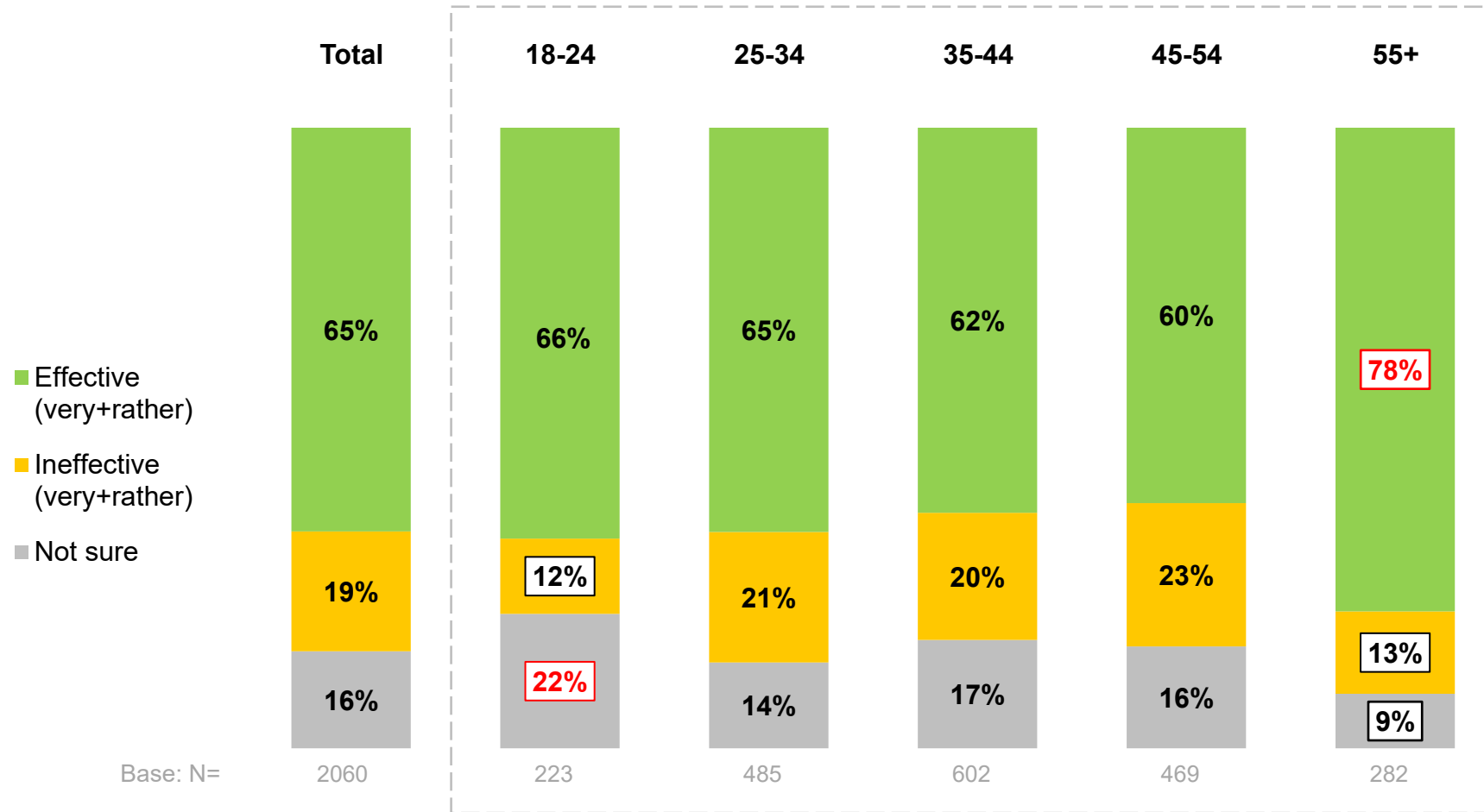


Base: all respondents
How effective do you consider the actions of the Ukrainian authorities with regard to military protection of the country from the aggressor?



□ 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



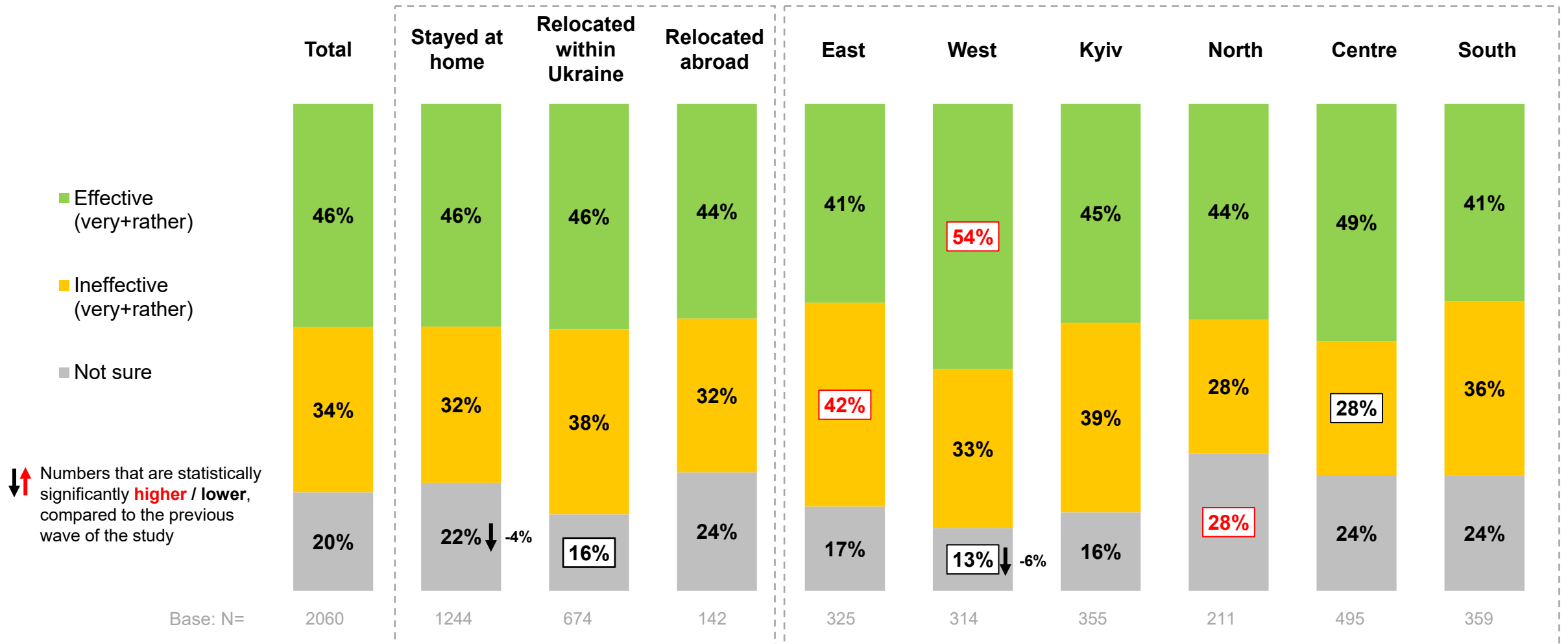
Base: all respondents
How effective do you consider the actions of the Ukrainian authorities with regard to military protection of the country from the aggressor?

 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



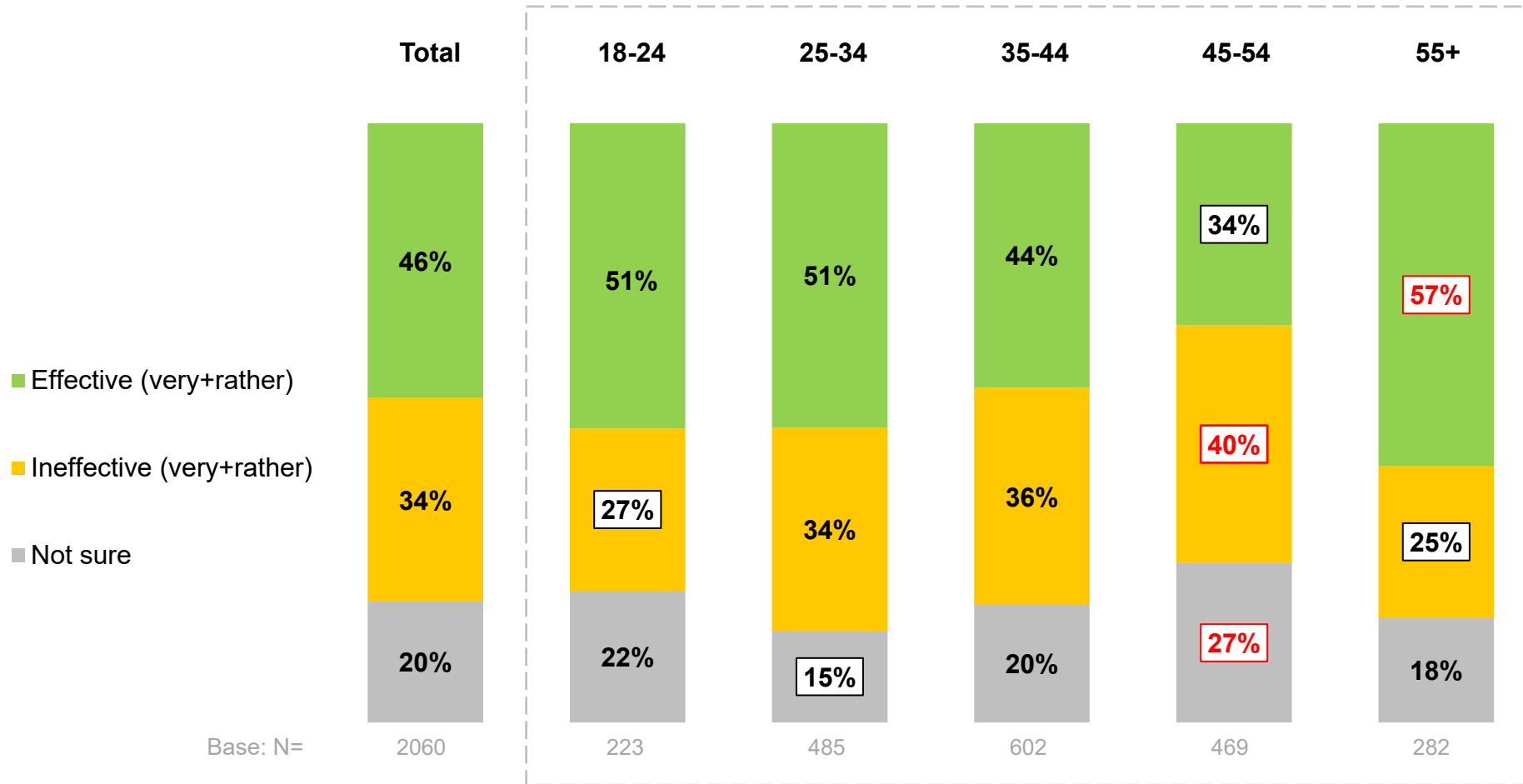
Base: all respondents
How effective do you consider the actions of the Ukrainian authorities with regard to regulation of the economy during the war?

□ 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



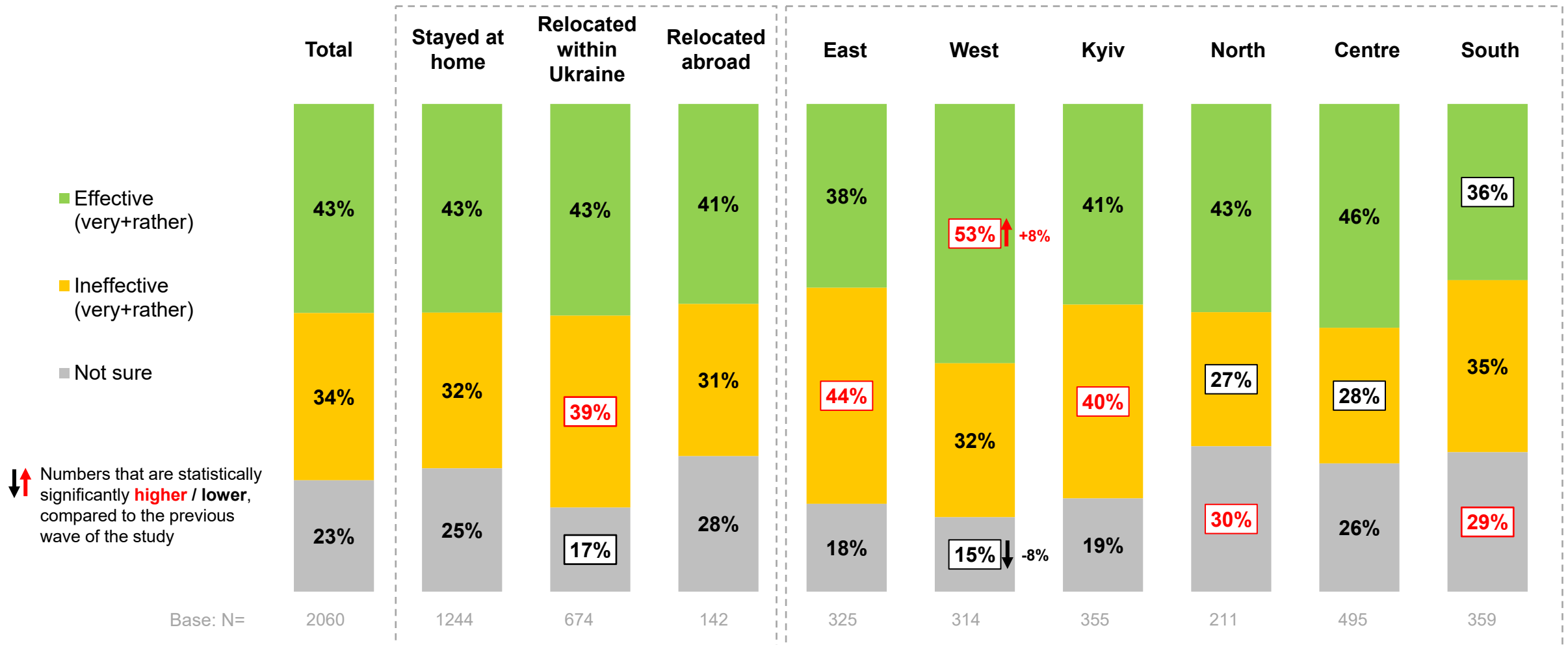
Base: all respondents
 How effective do you consider the actions of the Ukrainian authorities with regard to regulation of the economy during the war?

 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



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

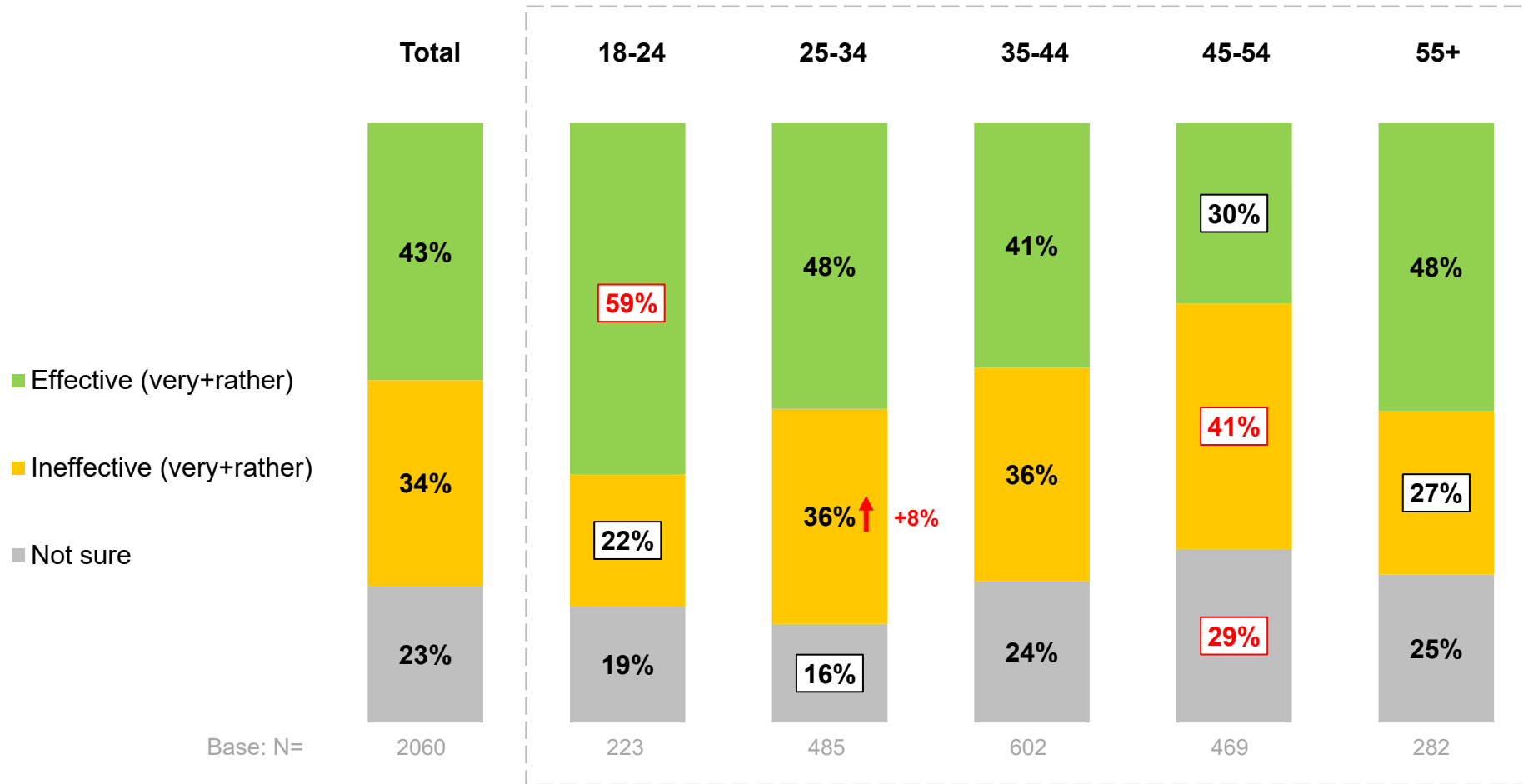
Base: all respondents
How effective do you consider the actions of the Ukrainian authorities with regard to ensuring the efficient functioning of the economy?

▣ 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



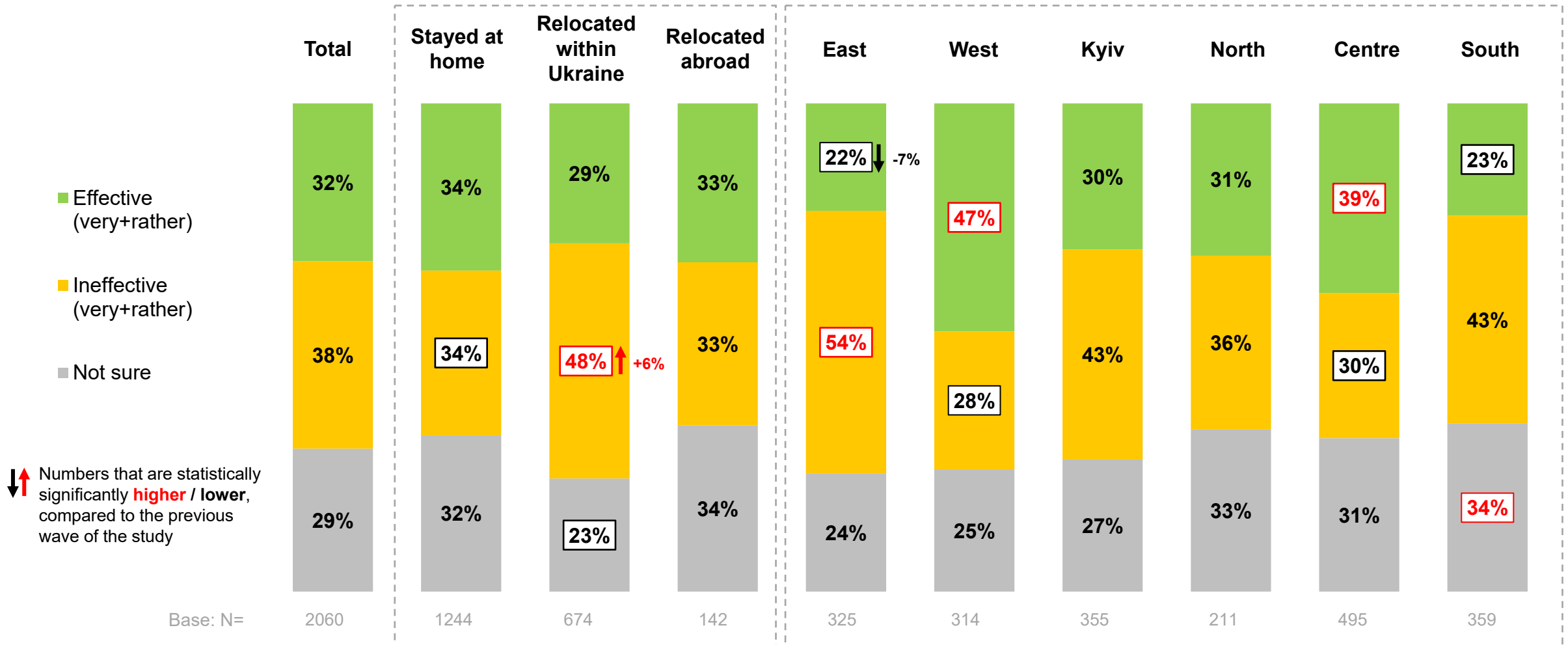
Base: all respondents
 How effective do you consider the actions of the Ukrainian authorities with regard to ensuring the efficient functioning of the economy?

 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?

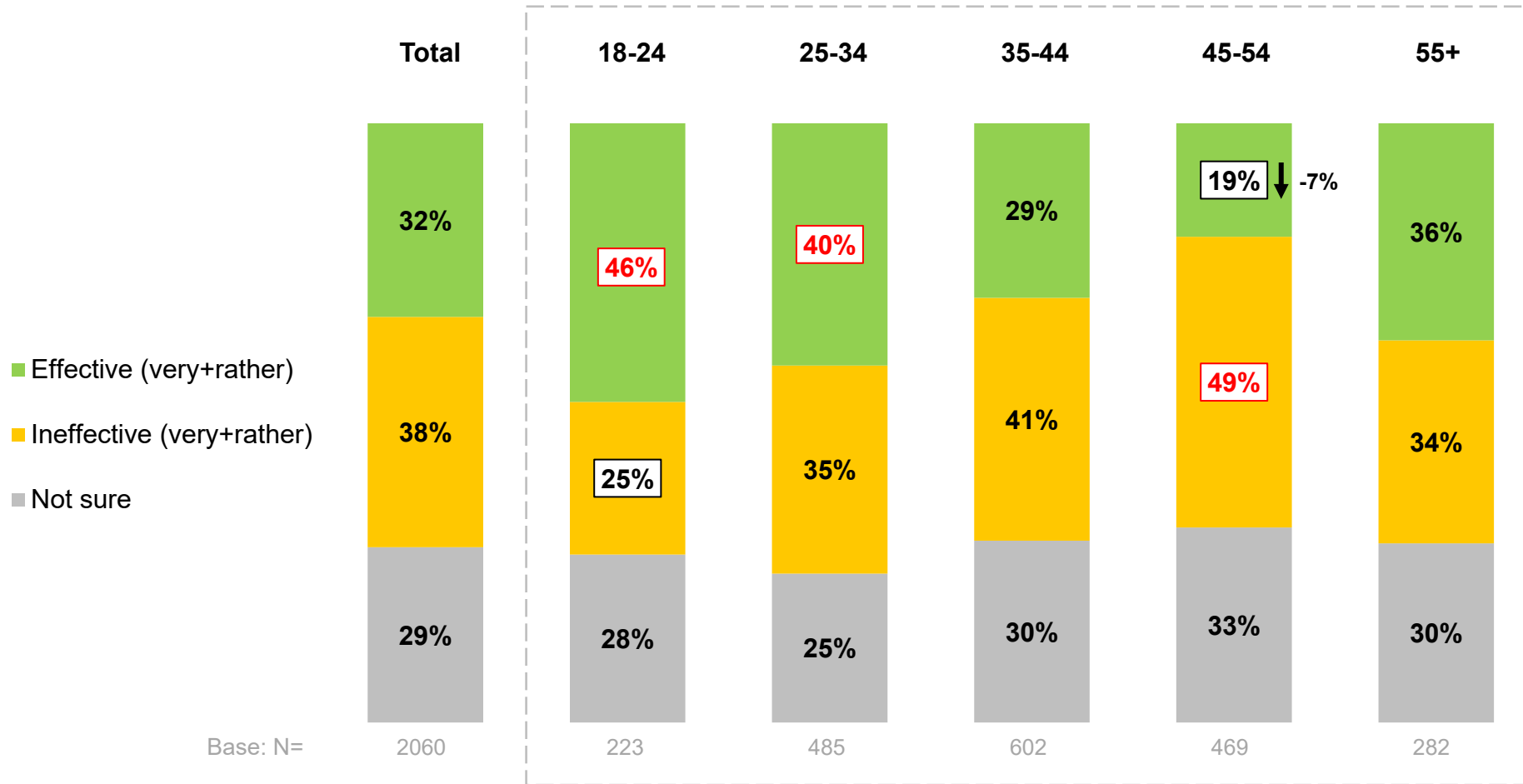
◻ ◻ Numbers that are statistically significantly **higher** / **lower** for a group, 50 compared to the sample as a whole

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

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

during the war

by age



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

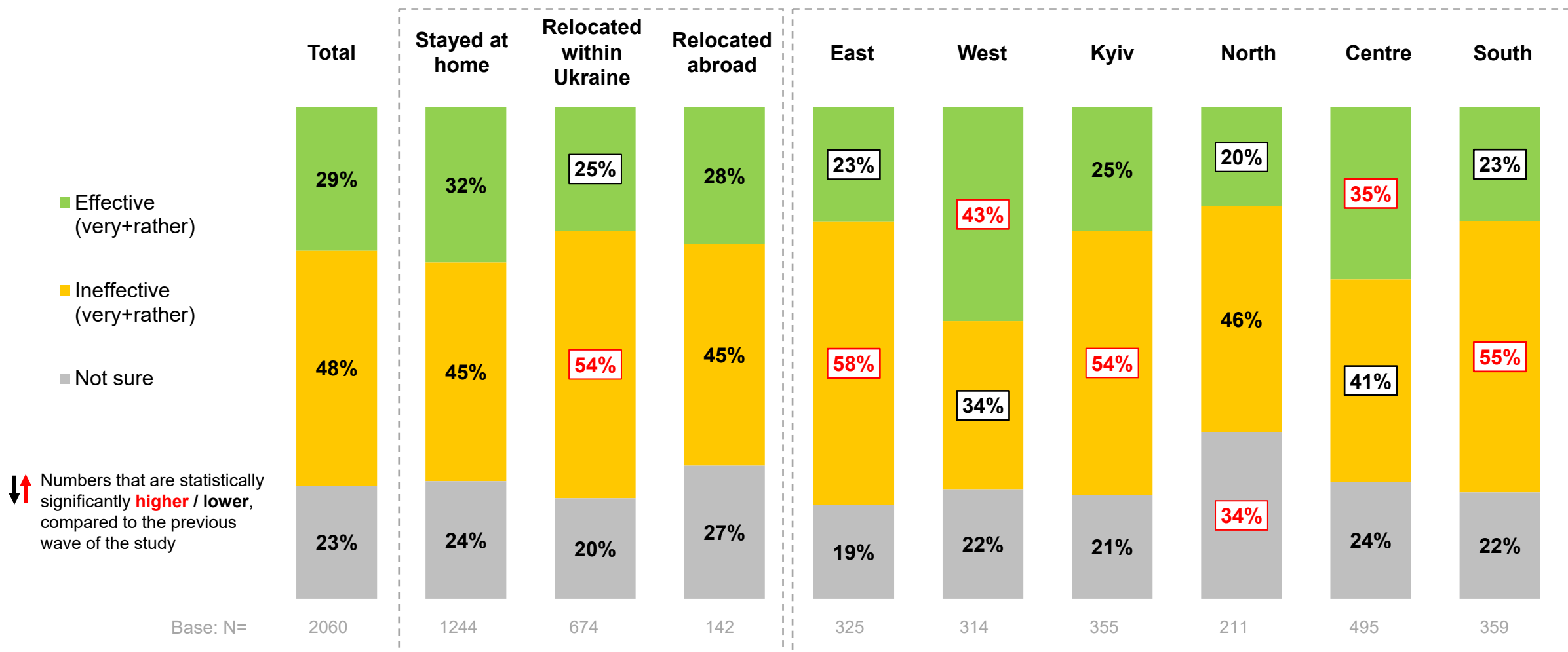
□ Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

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

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

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

by migration status and region

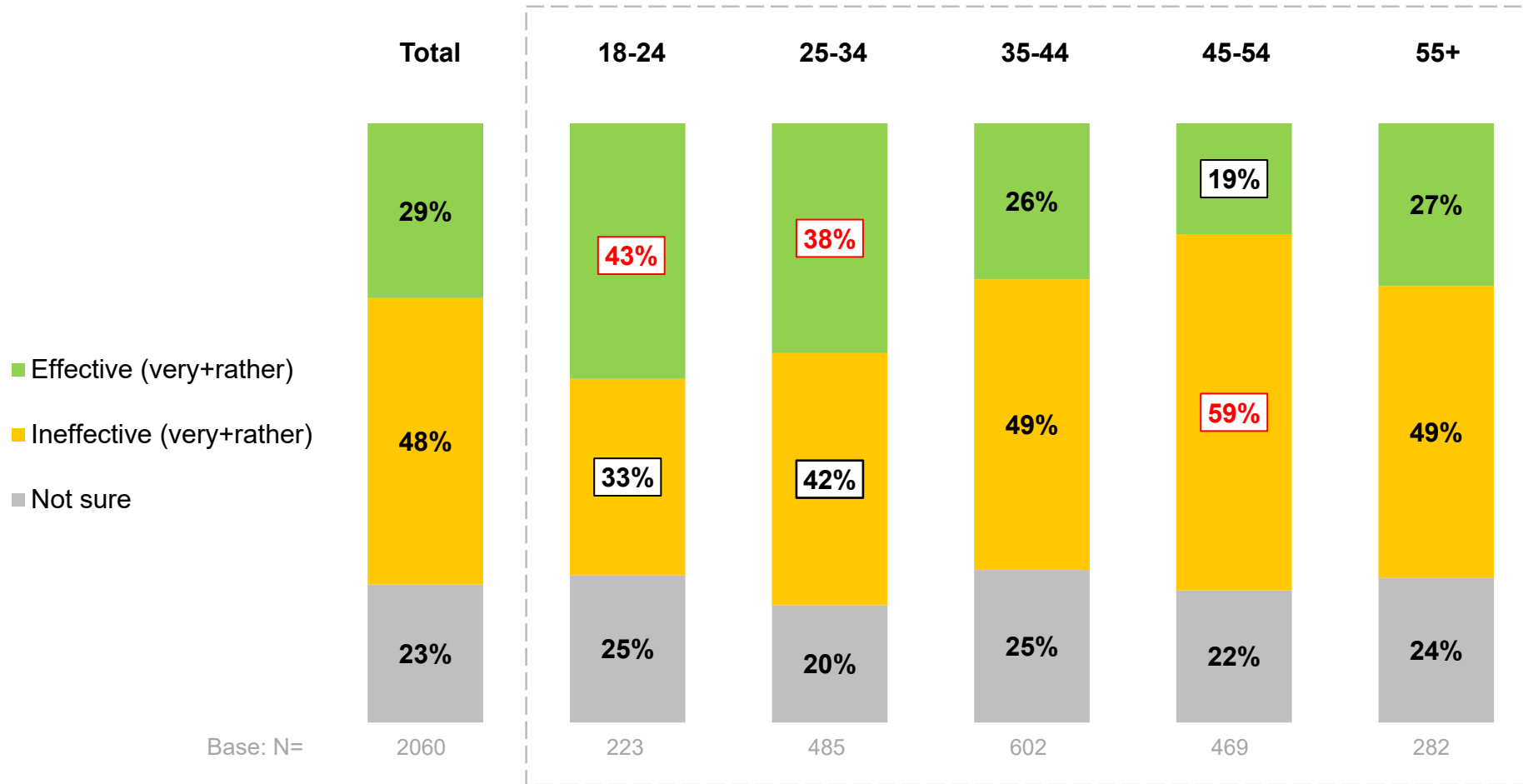


Base: all respondents
How effective do you consider the actions of the Ukrainian authorities with regard to aiding citizens of Ukraine who lost their job and income during the war?




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

Respondents express the highest percentage of trust in the Armed Forces of Ukraine (61%), the President of Ukraine (44%) and volunteer organizations (31%) – this group remains unchanged. Compared to the previous wave, the level of trust in the police has slightly decreased.

| | I wave (20-22.05) N=2083 | VI wave (29.07-1.08) N=2009 | VII wave (12-15.08) N=2005 | VIII wave (25-28.08) N=2060 |
|----------------------------------|--------------------------------|-----------------------------------|----------------------------------|-----------------------------------|
| Armed Forces of Ukraine | 62% | 63% | 62% | 61% |
| President of Ukraine | 49% | 46% | 44% | 44% |
| Volunteer organizations | 35% | 32% | 30% | 31% |
| Doctors | 24% | 18% | 17% | 16% |
| Charitable organizations | 15% | 16% | 16% | 16% |
| International organizations* | | | 12% | 11% |
| Church | 10% | 10% | 9% | 10% |
| National Police of Ukraine | 16% | 13% | 12% | 10%↓ |
| Government of Ukraine | 13% | 8%↓ | 9% | 8% |
| Media* | | | 5% | 5% |
| Verkhovna Rada of Ukraine | 7% | 4%↓ | 4% | 4% |
| National Bank of Ukraine | 7% | 4% | 3% | 4% |
| Ministry of Finance of Ukraine | 4% | 2% | 2% | 2% |
| State Customs Service of Ukraine | 3% | 2% | 2% | 1% |
| Courts | 2% | 1% | 1% | 1% |
| State Tax Service | 2% | 1% | 2% | 1% |
| None of the above | 7% | 9%↑ | 8% | 9% |

*were added in 7th wave of survey

Base: all respondents

Which of the following institutions do you trust?

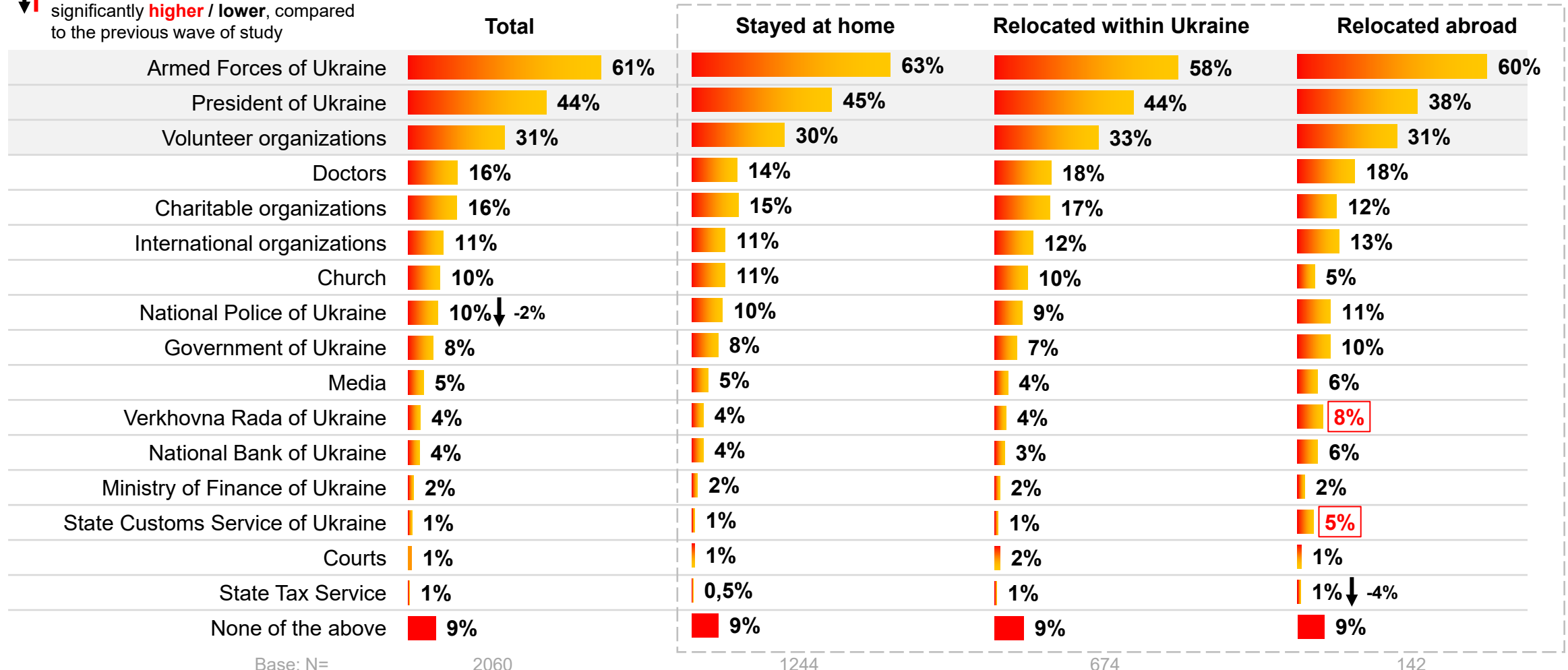
↑↓ Numbers that are statistically significantly higher / lower, compared to the previous wave of study; figures of VI wave are compared to the figures of IV wave**

TRUST IN INSTITUTIONS

by migration status

The only significant differences depending on migration status are a slightly higher level of emigrants' trust in the VRU and the State Customs Service; the level of their trust in the State Tax Service decreased in the eighth wave.

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



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

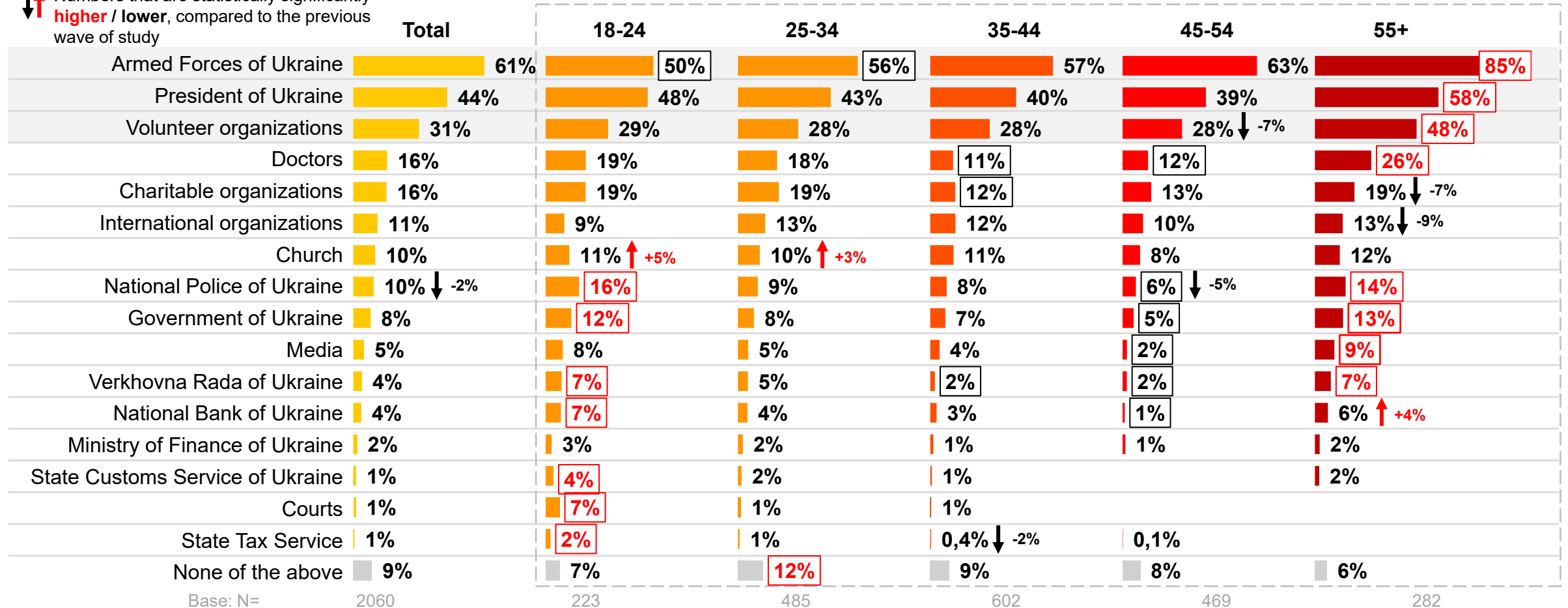
Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

TRUST IN INSTITUTIONS

by age

Respondents aged 18-24 and 55+ trust a large number of institutions significantly more than other age groups. Trust in the church has increased among young people aged 18-34, and in the National Bank among people aged 55+. At the same time, among these two age groups, there was a decrease in the level of trust in charitable and international organizations, and among representatives of the age group 45-54 – in volunteer organizations and the National Police.

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



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

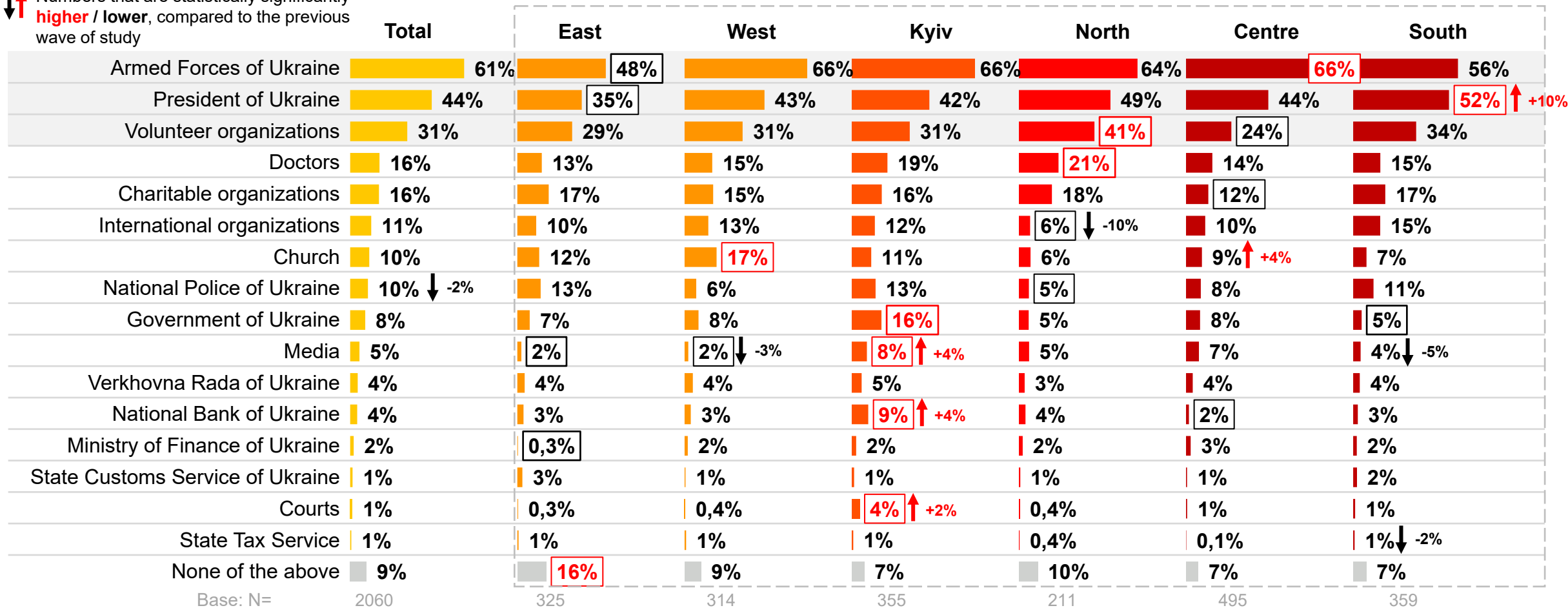
Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole 56

TRUST IN INSTITUTIONS

by region

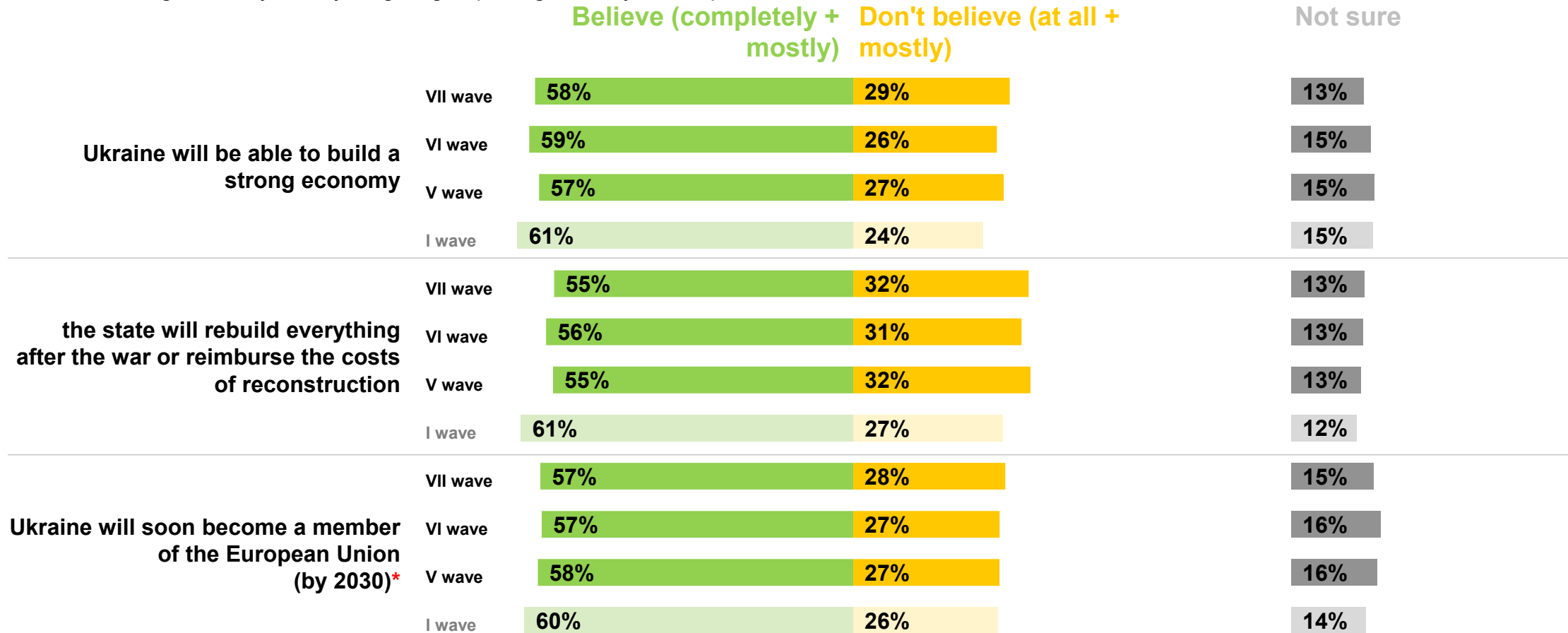
People from the Eastern region still express the lowest level of trust in the Armed Forces of Ukraine (48%), while residents of the Centre have the highest level of trust (66%). When it comes to trust in the President, he is the least trusted in the East, and the most in the South; the latter indicator has increased significantly compared to the previous wave. In general, people from the East are more inclined to express distrust in all the listed institutions. The indicator of trust in mass media is dynamic: in the West and the South of the country, trust in media has decreased, among residents of Kyiv it has increased (and is significantly higher than the general indicator).

↑ Numbers that are statistically significantly higher / lower, compared to the previous 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 without significant changes – at the level of 55-58%. Compared to the previous wave, the gap between the 18-24 and 25-34 age groups has increased when it comes to belief in a strong economy – the youngest group is significantly more optimistic.



*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

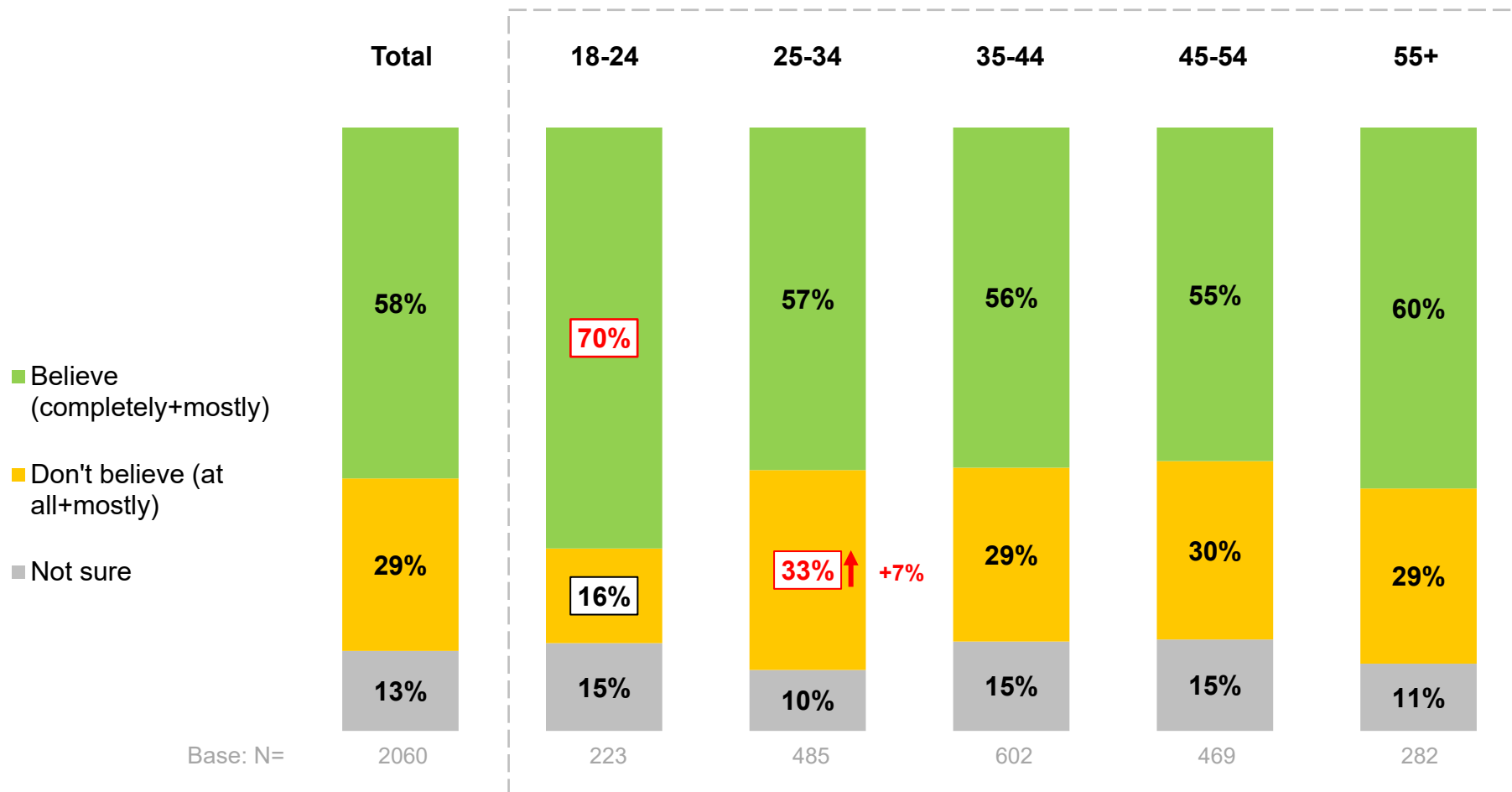
Base: all respondents; I wave – N = 2083, VI wave – N = 2009, VII wave – N = 2005, VIII wave – N = 2060.

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;

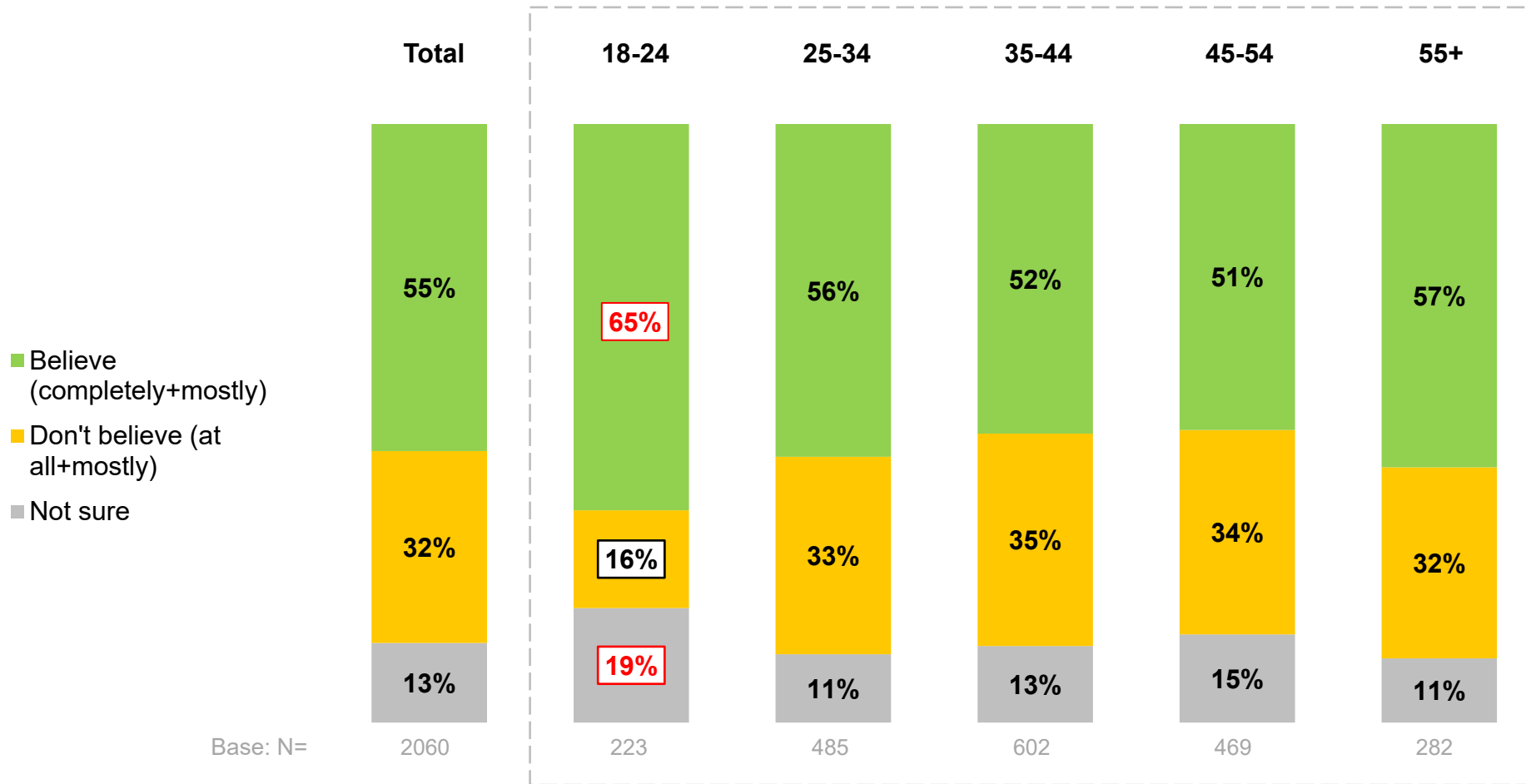
Do you believe that Ukraine will be able to build a strong economy?


 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?

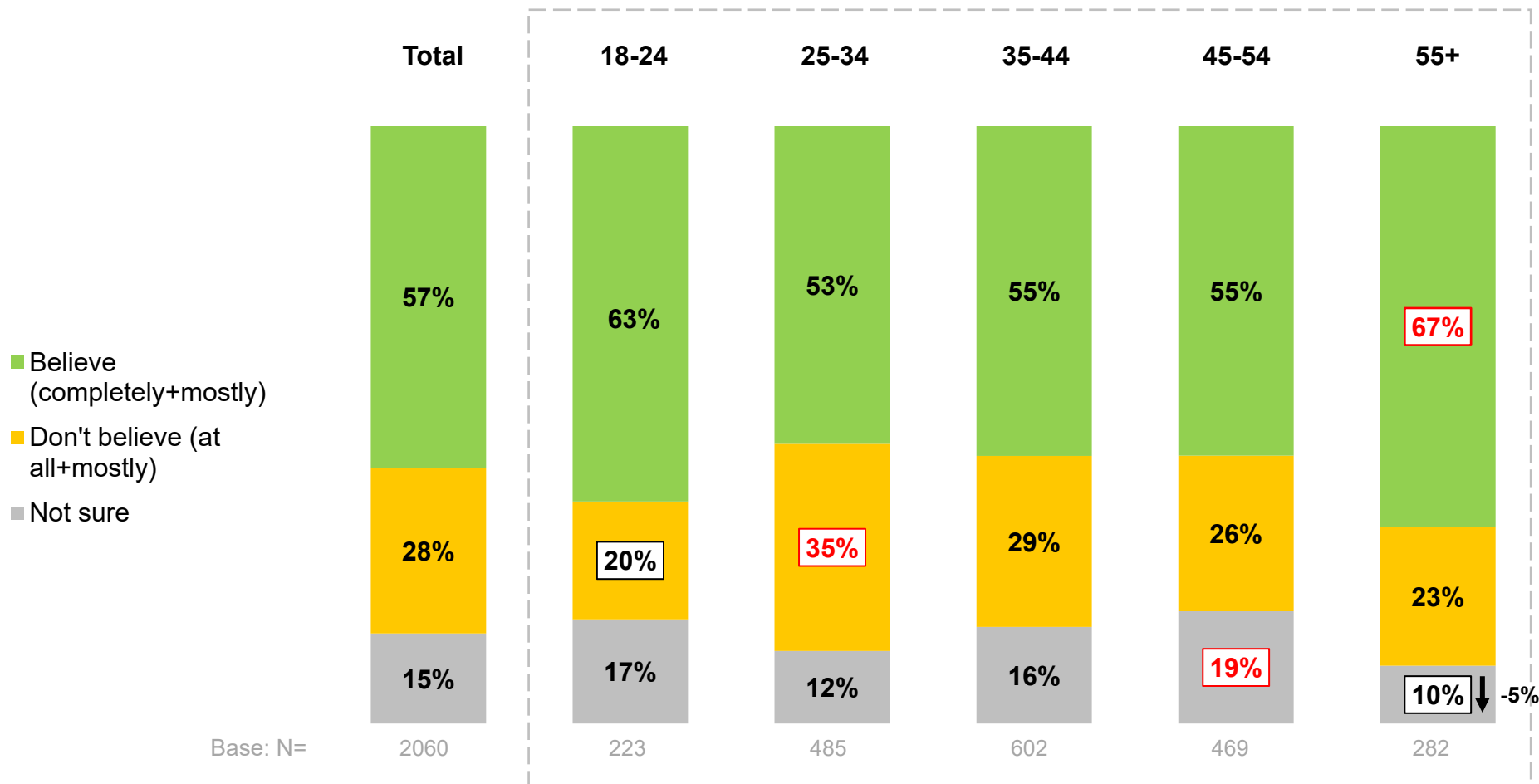
↑↓ Numbers that are statistically significantly higher / lower, compared to the previous wave of the study

□ 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



↑ 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 - 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)?

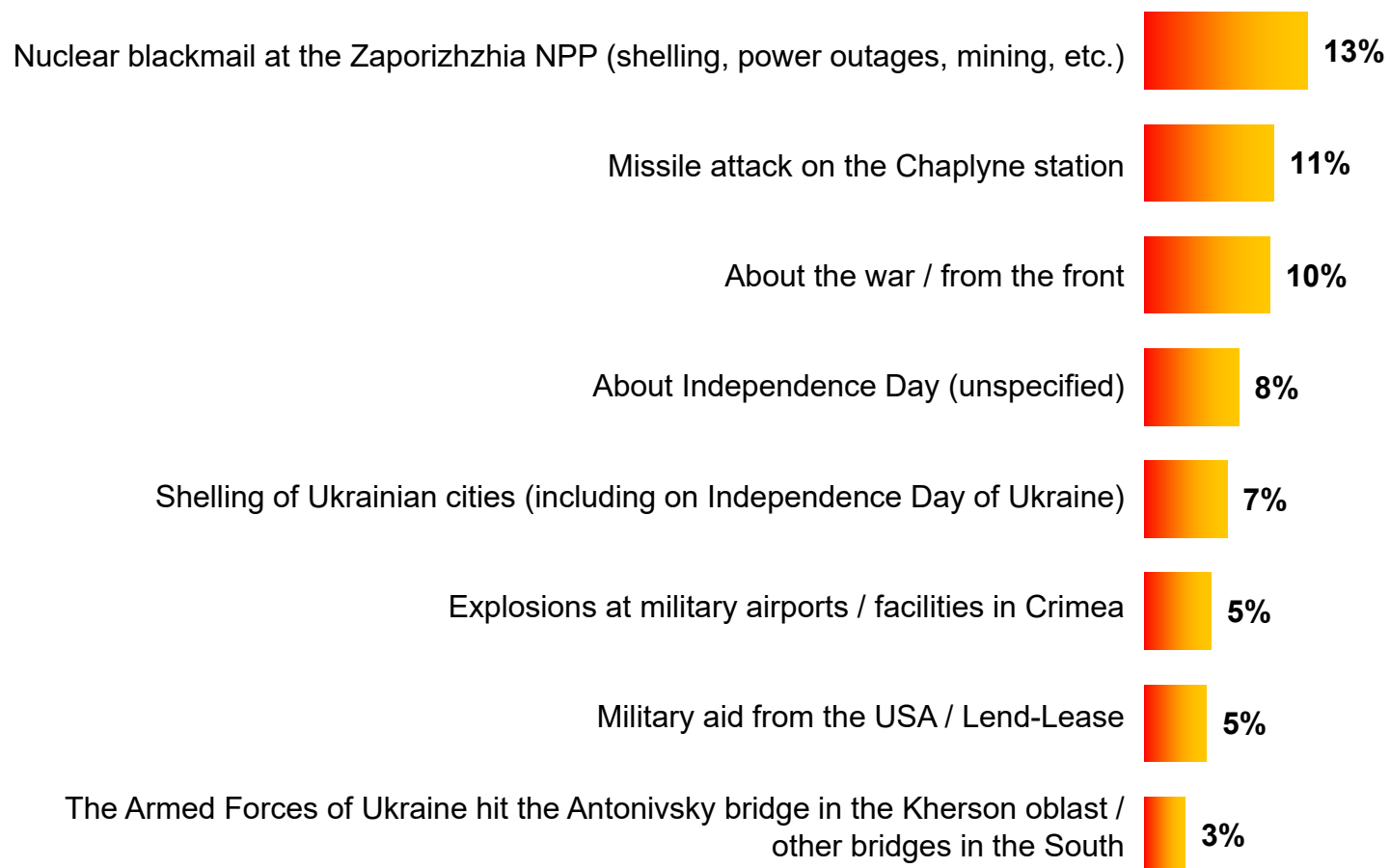
**LATEST NEWS:
KNOWLEDGE AND
PERCEPTION**



MOST IMPORTANT NEWS OF THE LAST WEEK

spontaneous answers

The important news that was most often spontaneously mentioned by the respondents was the nuclear blackmail at the Zaporizhzhya NPP (13%), the missile attack on the Chaplyne station (11%) and news about the war in general (10%).



Base: all respondents, N=2060

Only the alternatives that have been mentioned in >3% 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 fact that Russia shelled the Chaplyne railway station in the Dnipropetrovsk oblast (76%). The least respondents are aware that the Crimean Platform summit was held in Kyiv (41%).




KNOWLEDGE OF THE EVENTS

by region

Respondents from Kyiv significantly more often heard that the "Crimean Platform" summit was held in the city. Respondents from the East significantly less often heard about the allocation of a new package of military aid to Ukraine from the USA and about Ukraine gaining access to the ICEYE satellite, while respondents from the South significantly more often heard about the latter event. Respondents from the Centre heard more often about Russia's shelling of the Chaplyne railway station, while respondents from the South heard less often.

| | Total | East | West | Kyiv | North | Centre | South |
|--|-------|------|------|------|-------|--------|-------|
| Russia's shelling of the Chaplyne railway station in the Dnipropetrovsk oblast | 76% | 75% | 75% | 75% | 75% | 82% | 69% |
| Death of Russian propagandist O. Dugin near Moscow due to the explosion of the daughter's car | 67% | 66% | 68% | 69% | 65% | 67% | 63% |
| Allocation of a new package of military aid from the USA to Ukraine for almost 3 billion dollars | 62% | 55% | 59% | 65% | 62% | 64% | 62% |
| Ukraine gaining access to the ICEYE satellite thanks to the Prytula Fund | 58% | 48% | 61% | 56% | 57% | 59% | 65% |
| Holding of the "Crimean Platform" summit in Kyiv | 41% | 36% | 37% | 50% | 41% | 37% | 43% |
| Not sure / Have not heard about any of these | 10% | 13% | 6% | 8% | 13% | 8% | 10% |
| Base: N= | 2060 | 325 | 314 | 355 | 211 | 495 | 359 |

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, ⁶⁵ 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. Respondents aged 18-24 know about Russia's shelling of the Chaplyne railway station and about the death of the Russian propagandist O. Dugin near Moscow due to the daughter's car explosion significantly less than the sample in general. Respondents aged 35-44 are less aware of the allocation of a new military aid package from the USA to Ukraine, Ukraine gaining access to the ICEYE satellite, and the holding of the Crimean Platform summit in Kyiv. Respondents aged 25-34 heard less about the last event.

| | Total | 18-24 | 25-34 | 35-44 | 45-54 | 55+ |
|--|-------|-------|-------|-------|-------|-----|
| Russia's shelling of the Chaplyne railway station in the Dnipropetrovsk oblast | 76% | 66% | 73% | 72% | 78% | 90% |
| Death of Russian propagandist O. Dugin near Moscow due to the explosion of the daughter's car | 67% | 48% | 62% | 64% | 70% | 89% |
| Allocation of a new package of military aid from the USA to Ukraine for almost 3 billion dollars | 62% | 60% | 57% | 54% | 63% | 85% |
| Ukraine gaining access to the ICEYE satellite thanks to the Prytula Fund | 58% | 54% | 58% | 51% | 61% | 72% |
| Holding of the "Crimean Platform" summit in Kyiv | 41% | 42% | 35% | 34% | 42% | 60% |
| Not sure / Have not heard about any of these | 10% | 15% | 11% | 12% | 8% | 1% |
| Base: N= | 2060 | 223 | 485 | 602 | 469 | 282 |

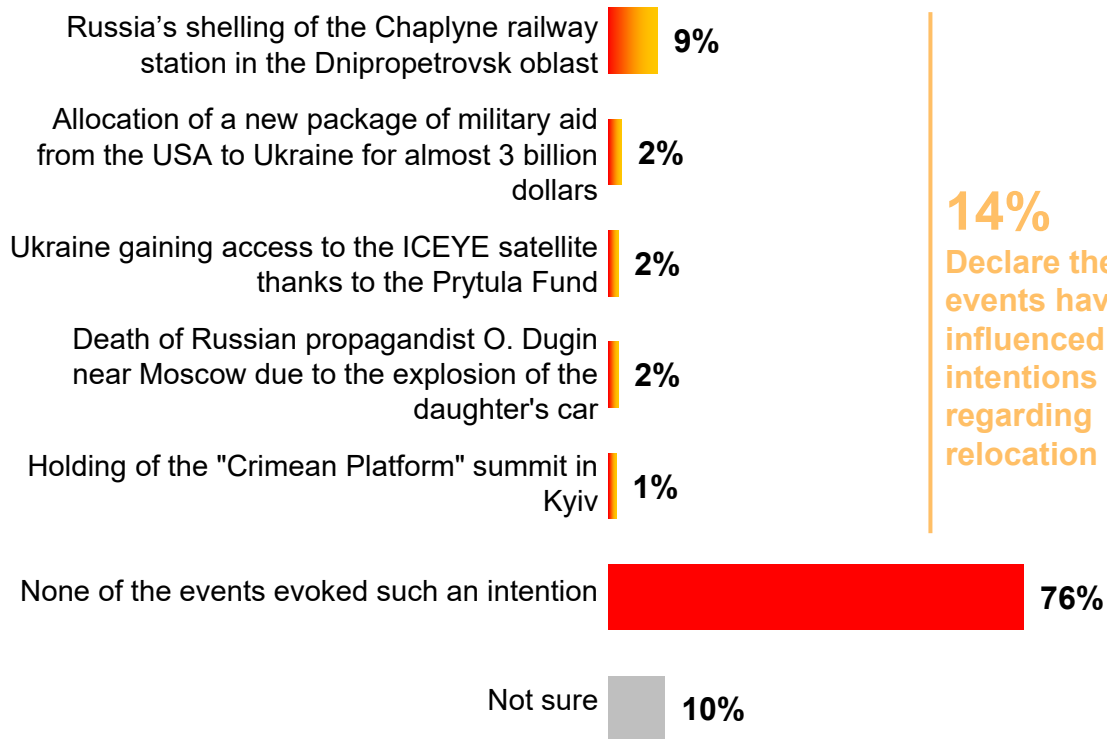
Base: all respondents
Which of the following events that occurred last week did you know / hear about?

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

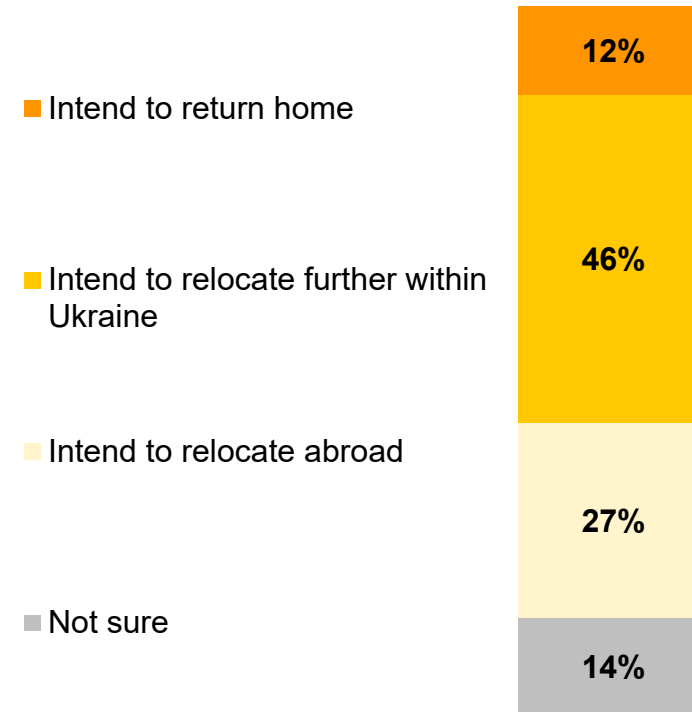
THE EFFECT OF THE AFOREMENTIONED EVENTS ON PLANS REGARDING RELOCATION

In the majority (76%) of respondents, the events they heard about did not make them want to change their current place of residence. The news that Russia shelled the Chaplyne railway station in Dnipropetrovsk oblast caused this desire most often (9%). Among the directions of relocation that the respondents plan to make in connection with the listed news, the most common is relocation within Ukraine (46%).

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 = 1863

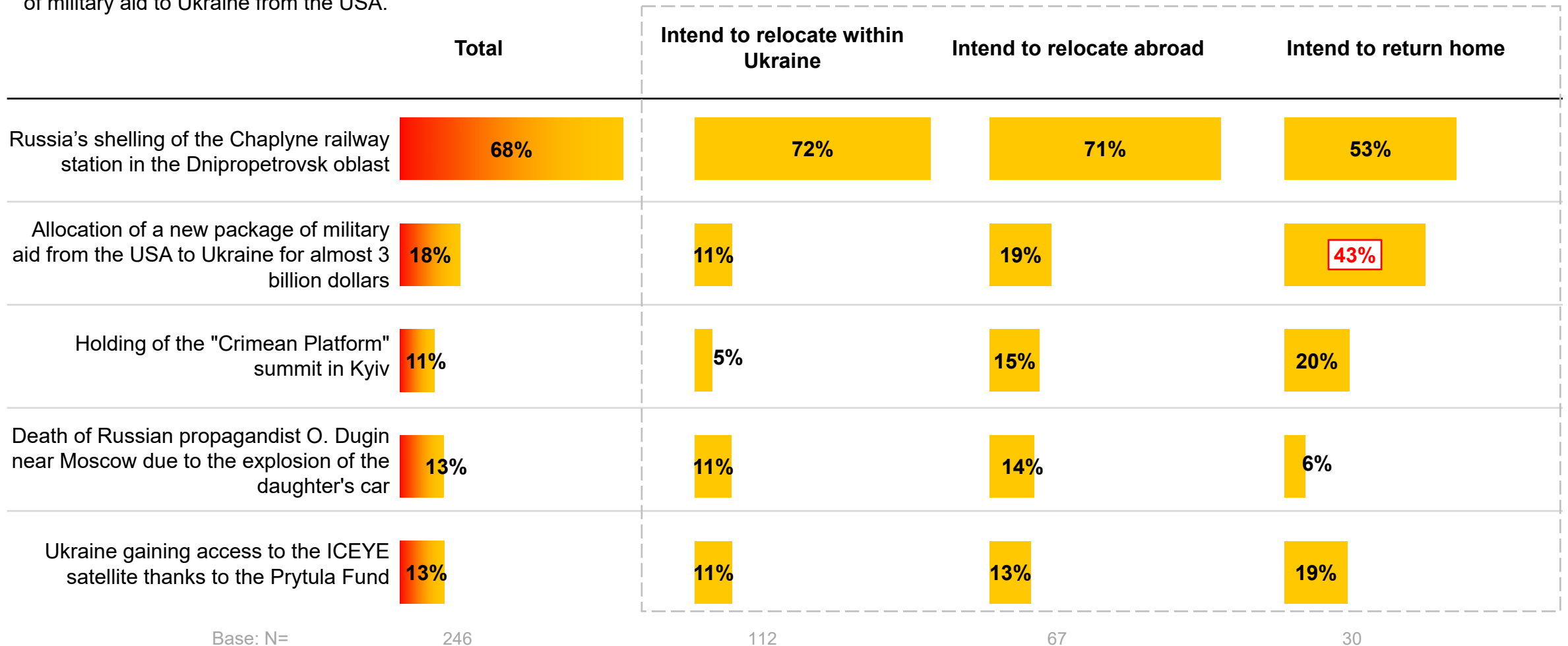
Base: respondents who want to relocate because of these events, N = 246

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 intend to return to their permanent place of residence were significantly more often influenced by the news about the allocation of a new package of military aid to Ukraine from the USA.



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, 68 compared to the sample as a whole

EMPLOYMENT DURING THE WAR

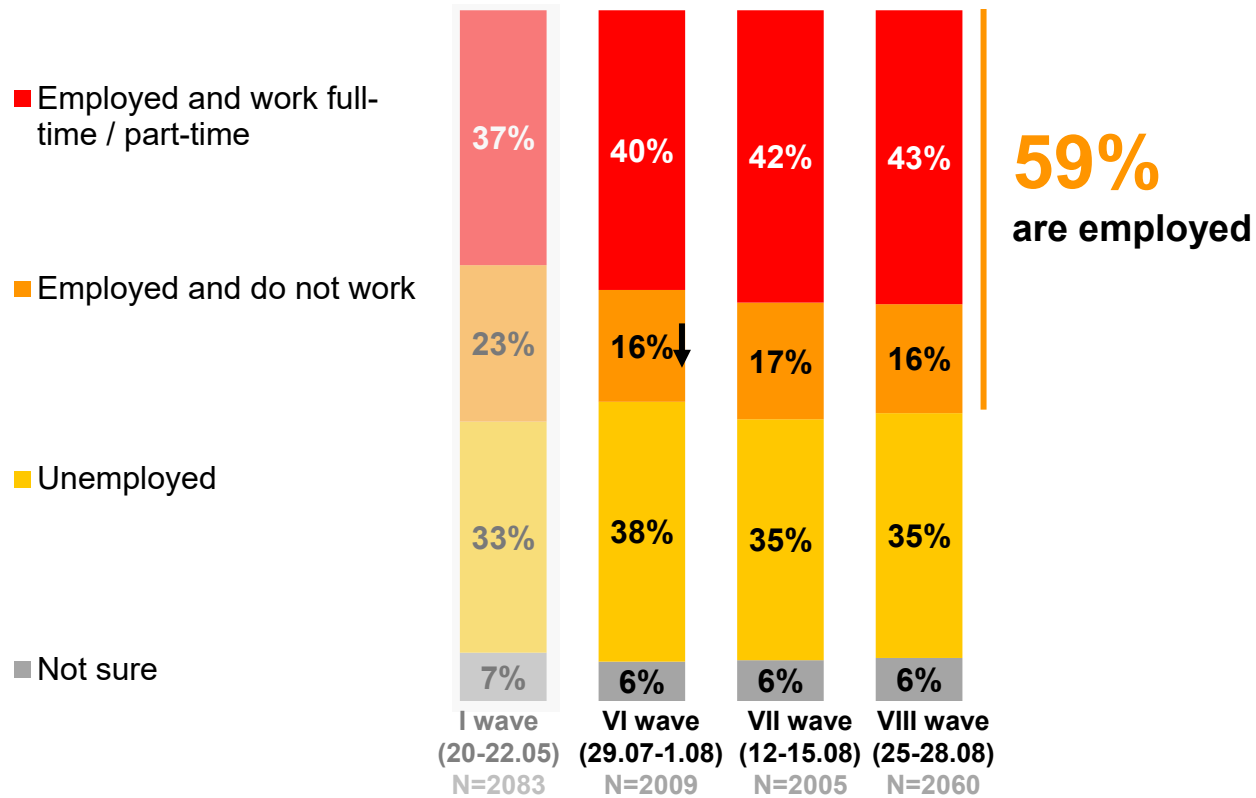


EMPLOYMENT DURING THE WAR

In the current wave, there were no recorded significant changes in employment status – 59% of Ukrainians* have a job. At the same time, 43% of them actively work full-time / part-time, while 16% do not perform any work tasks.

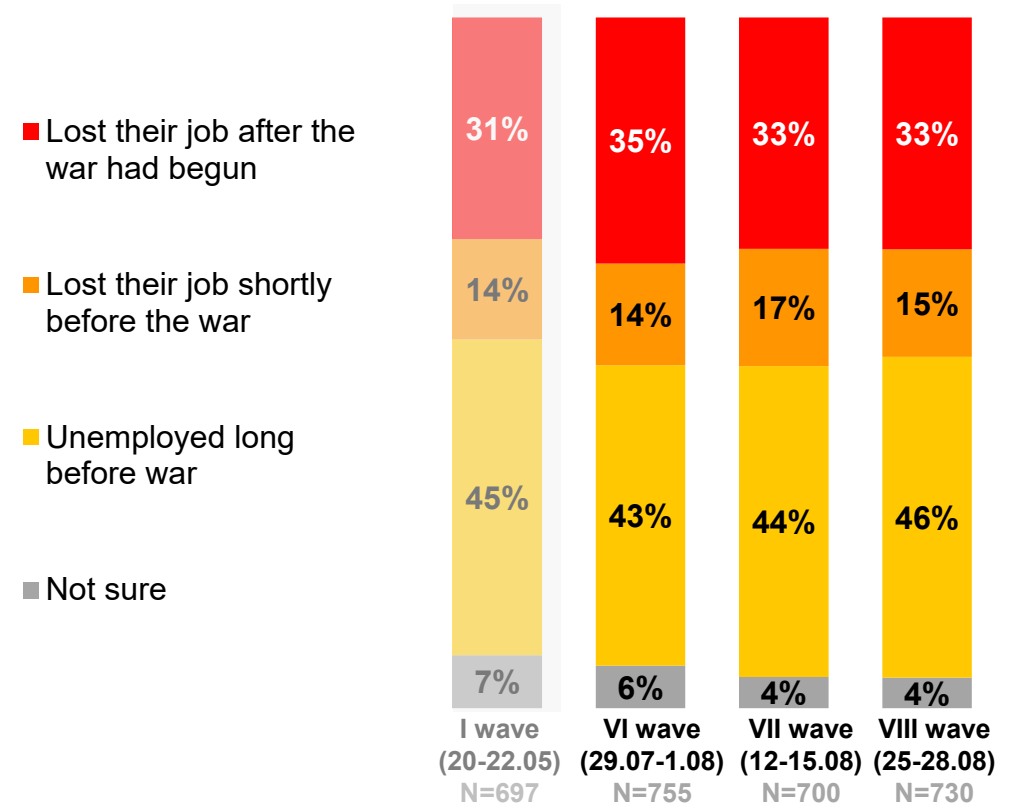
35% of Ukrainians* are unemployed – a third of them (33%) lost their jobs since the beginning of the war, and 46% were unemployed long before the invasion began.

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?

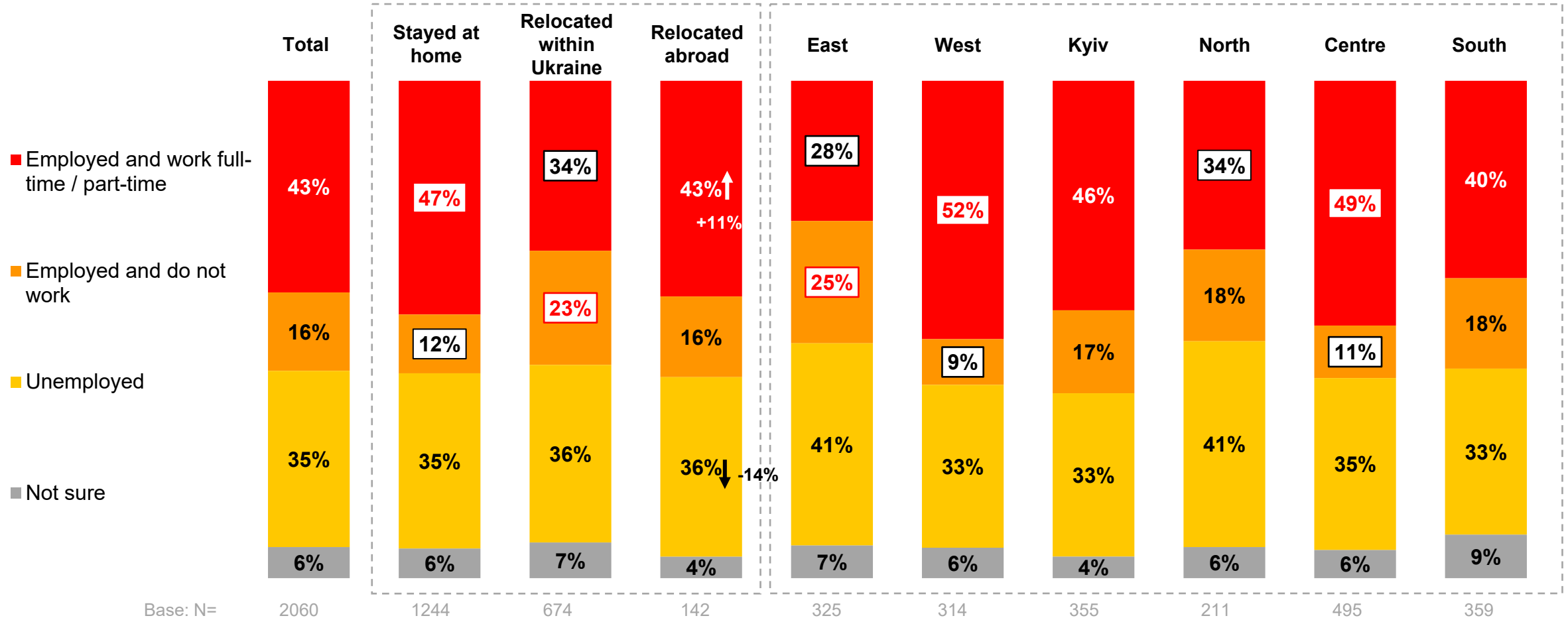
Which of the following phrases best describes your situation:

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

EMPLOYMENT DURING THE WAR

by migration status and region

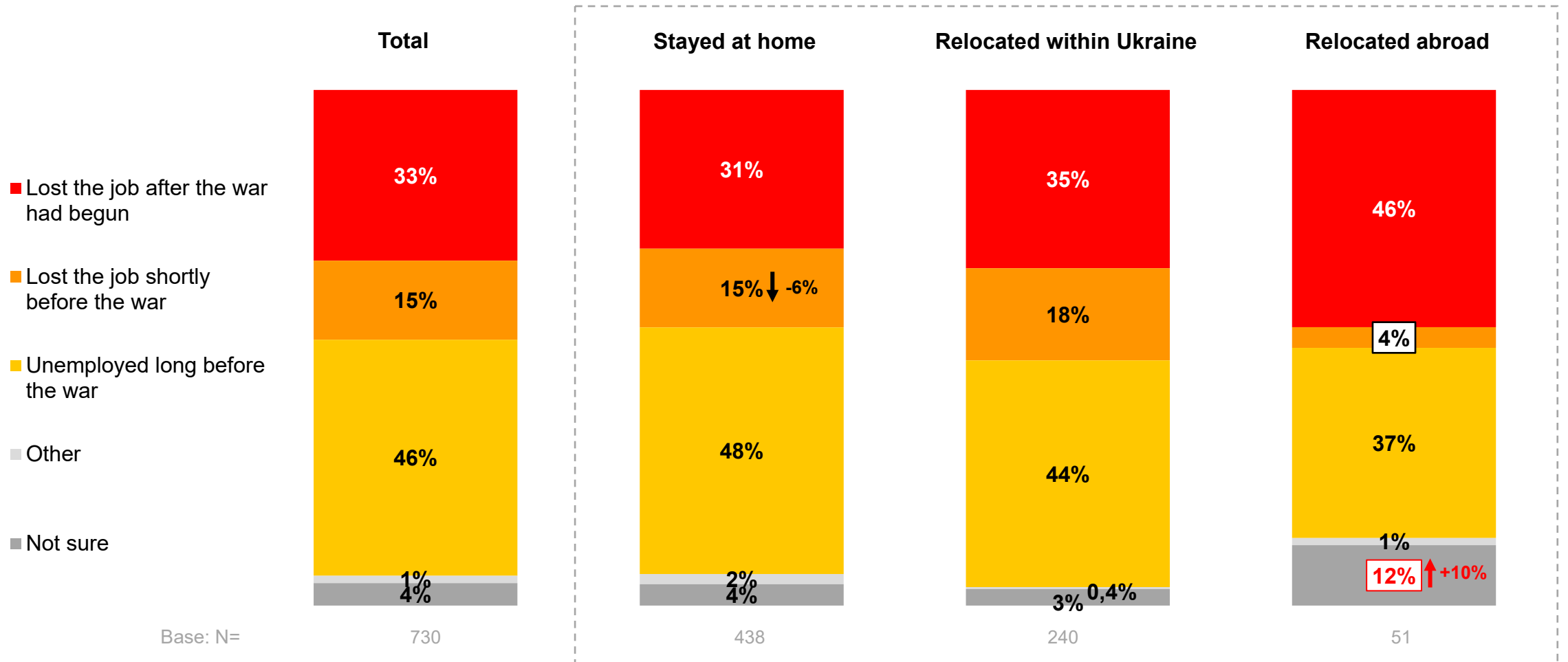
Among those who stayed at home, as well as among the residents of the Western and Central regions, there is a significantly higher share of those who have a job and are actively working. Among external migrants in the 8th wave of the survey, there was recorded a positive trend – the share of those who have a job increased by 11% (currently it is 43%).



UNEMPLOYMENT SPECIFICS

by migration status

The smallest share of those who lost their jobs due to the war is among the respondents who relocated abroad. Also among them is the highest share of those who hesitated to answer this question, and it has increased significantly compared to the previous wave of the study (+10%).



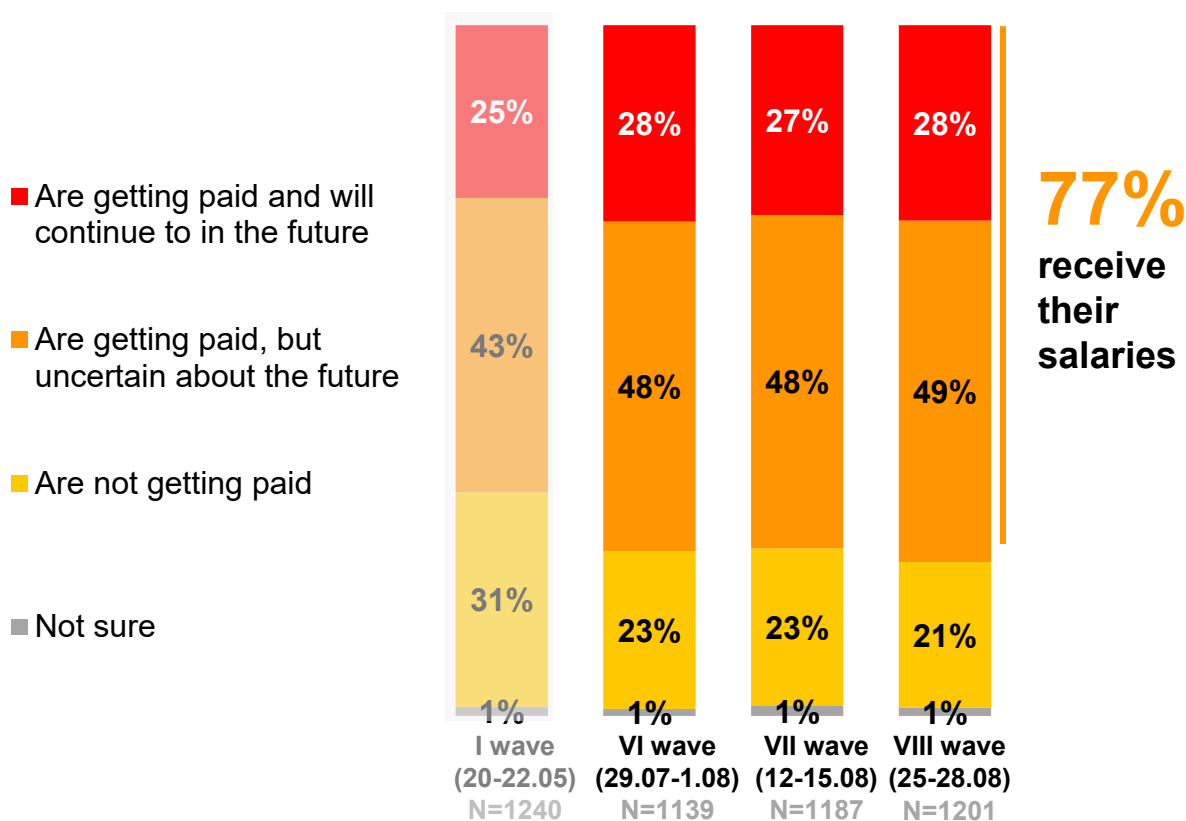
Base: respondents who are unemployed now
Which of the following phrases best describes your situation:

 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

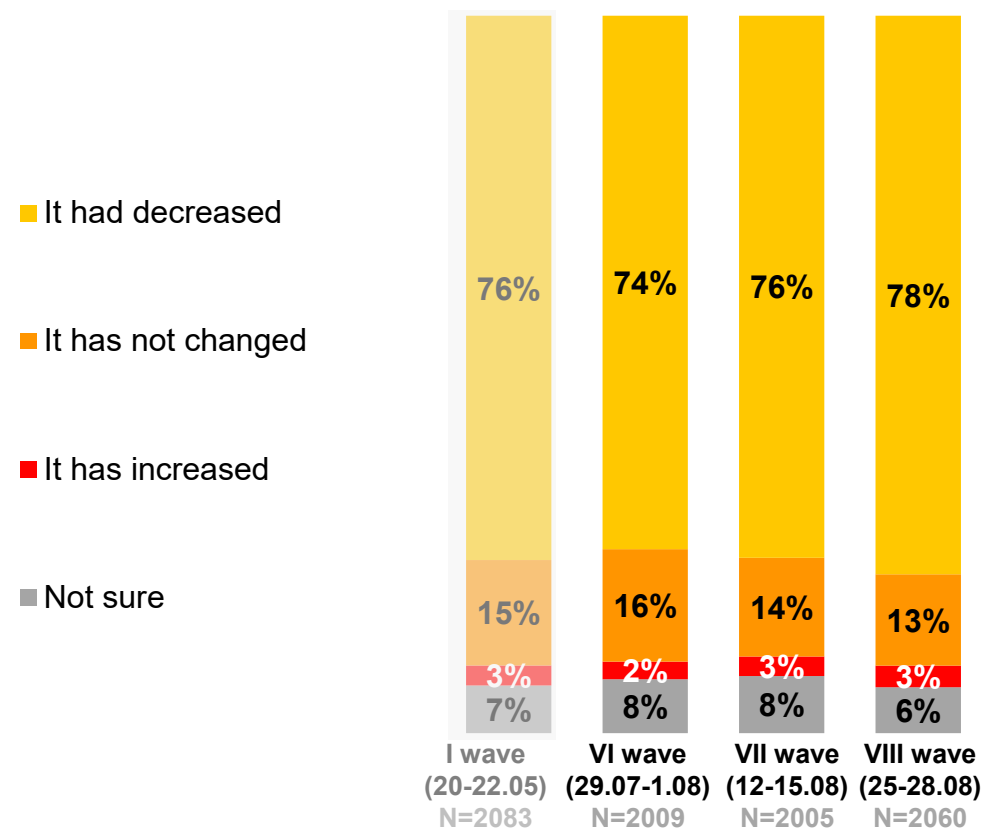
The majority of Ukrainians continue to declare a decrease in income since the beginning of the full-scale invasion (78%), and only 3% indicate that their income has increased. There were no specific changes in income stability among the employed population – 77% continue to receive salaries. However, the share of them who are confident that they will continue to receive it remains at the level of 28%, while 49% do not have such confidence.

Income stability:



Base: respondents who are employed

Changes in income:



Base: all respondents

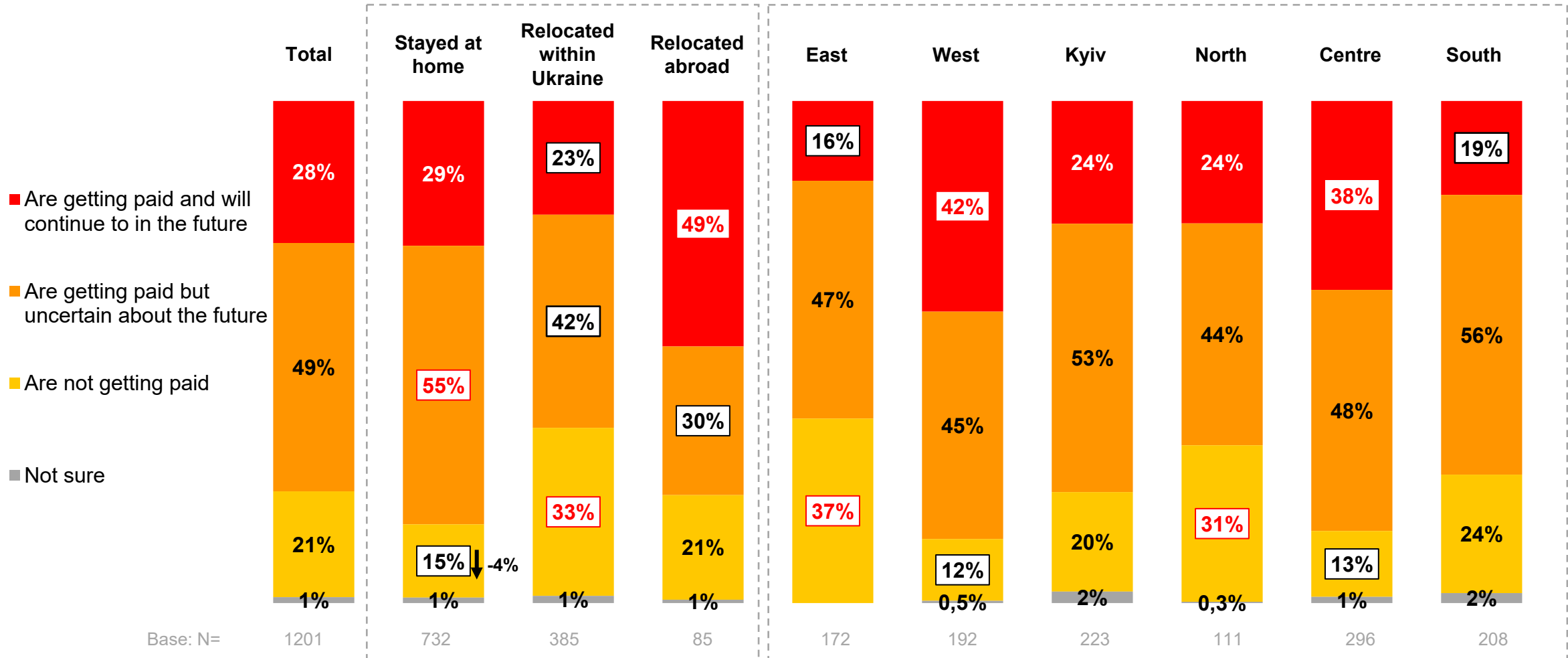
Do you receive salary?
How has your income changed since the full-scale war had begun?

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

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 eighth wave of the study, the share of those who do not receive payment among those who stayed at home also decreased significantly.



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

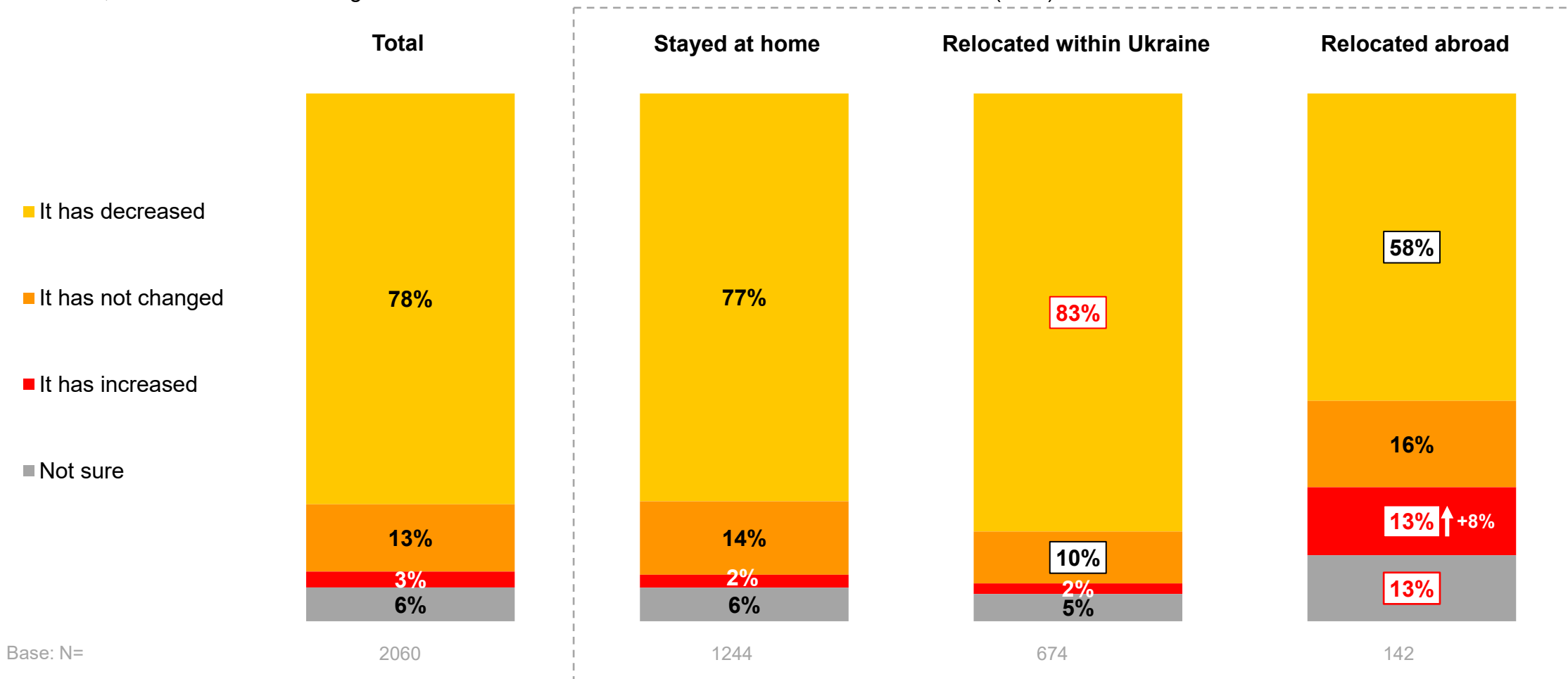
Numbers that are statistically significantly higher / lower for a group, compared to the sample as a whole

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

INCOME CHANGES

by migration status

As in the previous wave, the largest share of those whose income has decreased after the full-scale war had begun is recorded among internal migrants. At the same time, among those who relocated abroad, there are significantly less people whose income decreased (58% vs 78%). In addition, among external migrants in the current wave, there was recorded a significant increase in the share of those whose income increased (+8%).



Base: N=

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

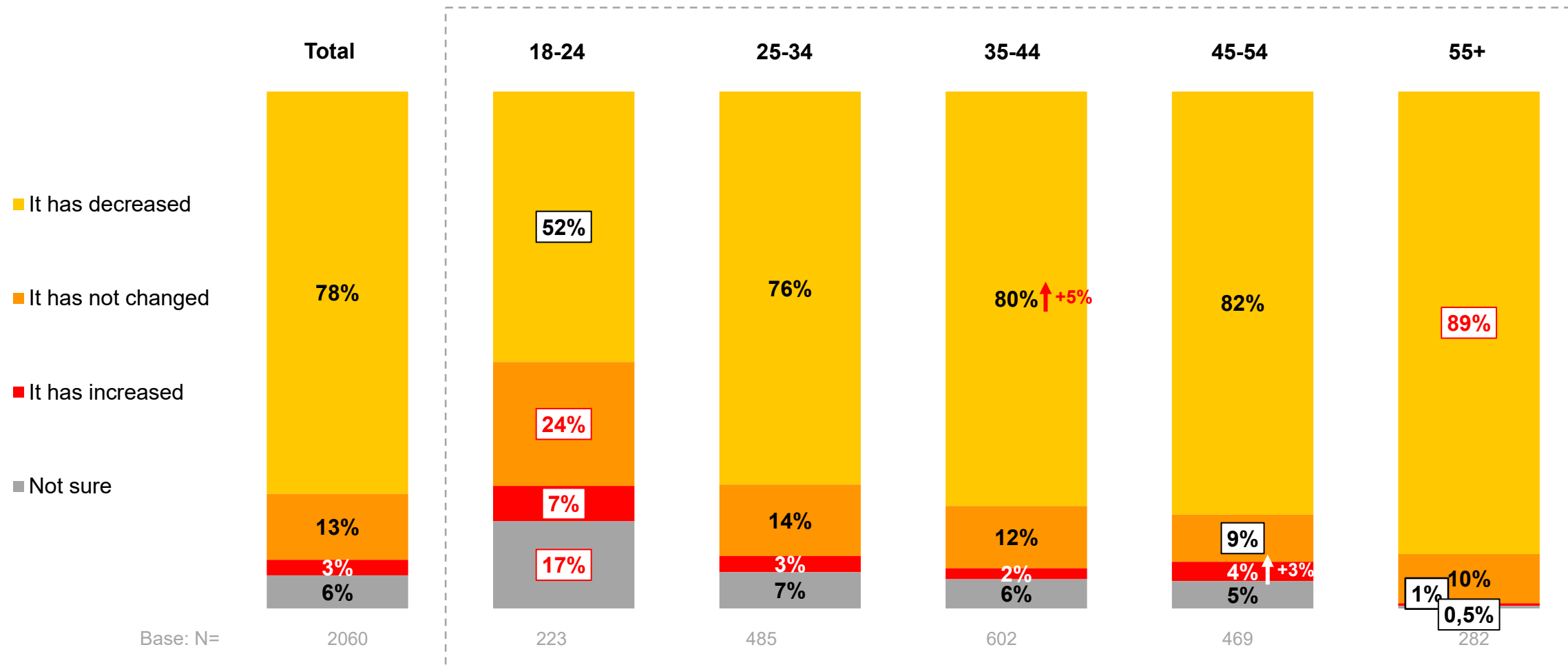
□ Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

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

INCOME CHANGES

by age

The largest share of those whose income has decreased is observed among respondents over 55 years, and the smallest – among representatives of 18-24 age group. Compared to the previous wave, among the 35-44 age group, there was a significant increase in the share of those whose income has decreased.



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

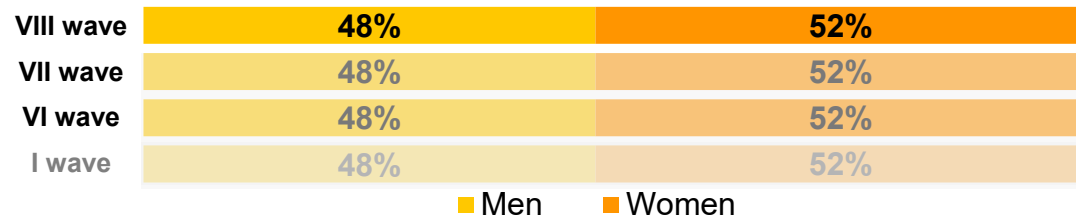
Numbers that are statistically significantly higher / lower for a group, compared to the sample as a whole
 Numbers that are statistically significantly higher / lower, compared to the previous wave of the study

SAMPLE STRUCTURE

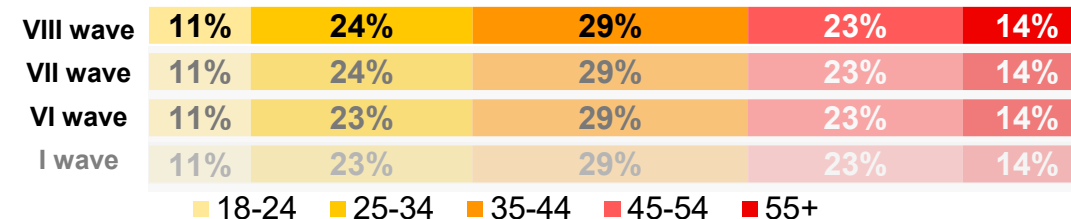


SAMPLE STRUCTURE

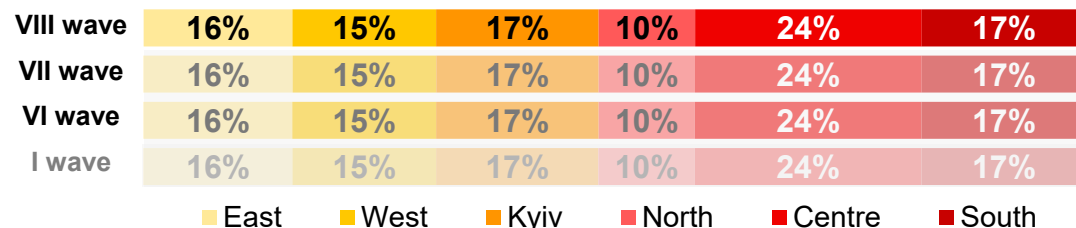
Gender



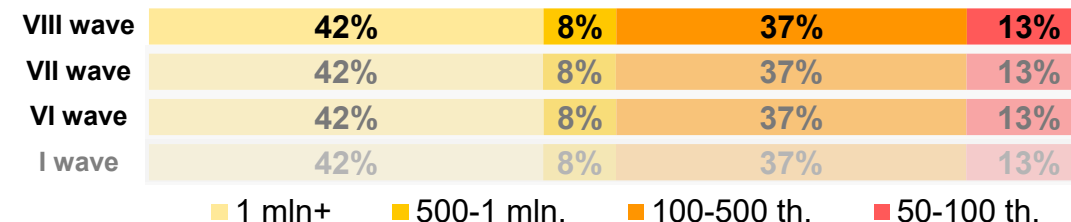
Age



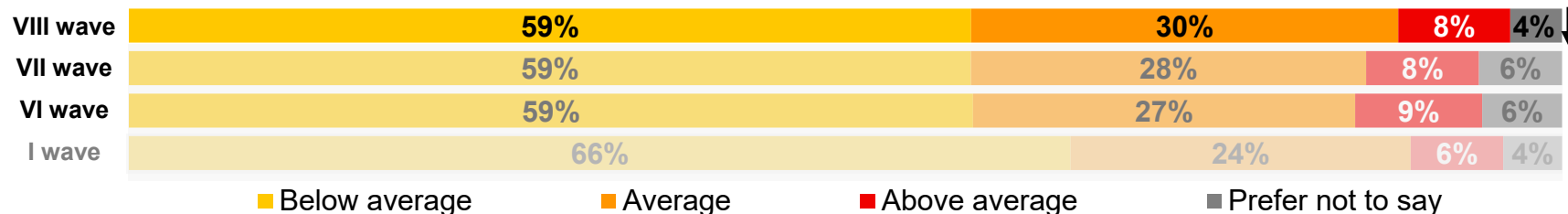
Region (before the war)



Size of settlement (before the war)

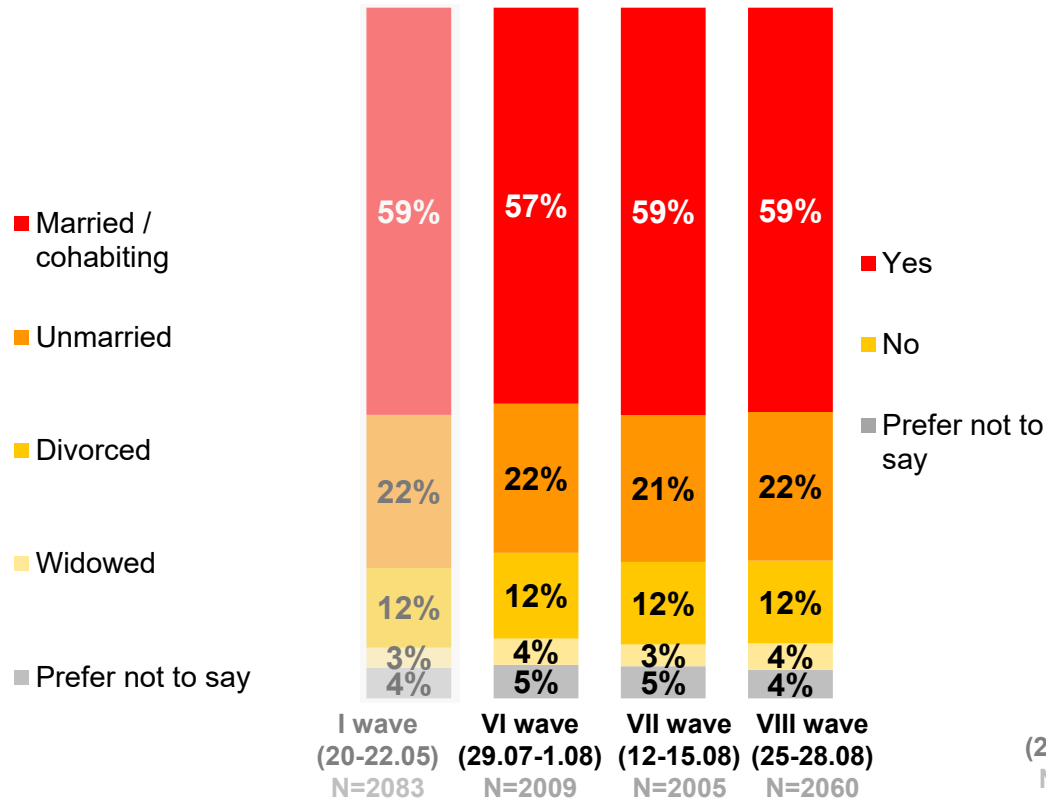


Income level

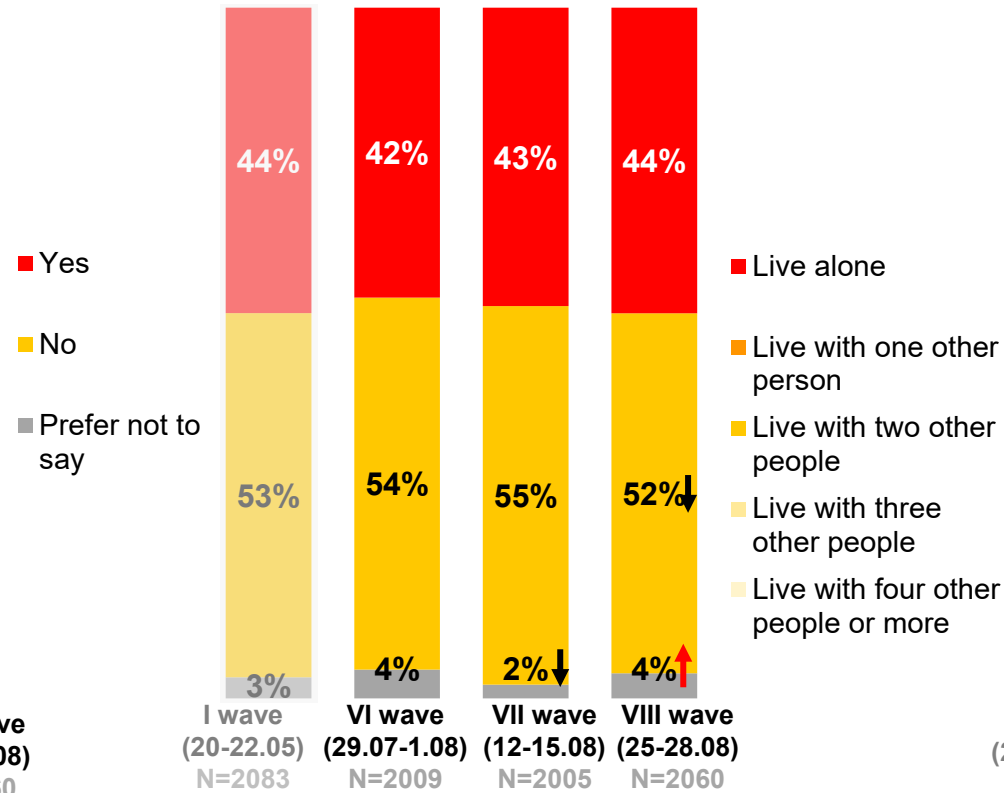


SOCIO-DEMOGRAPHIC PROFILE

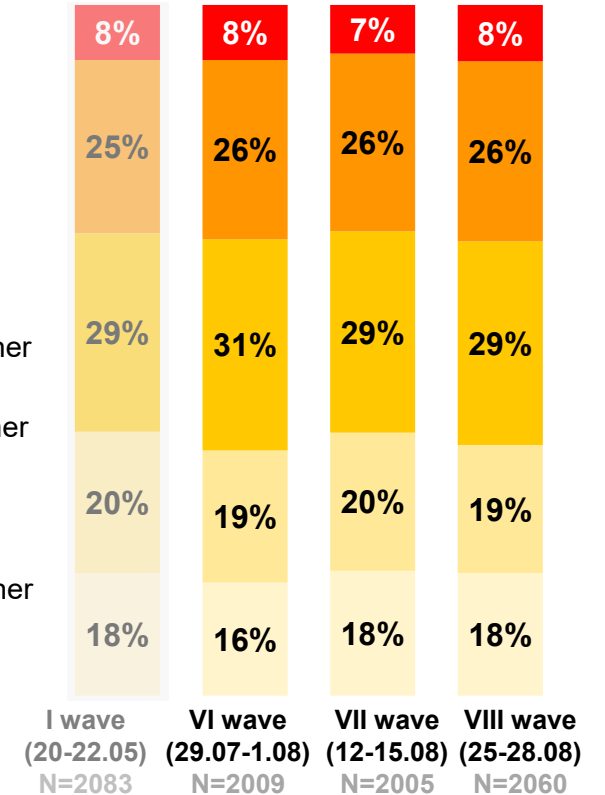
Marital status



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



Number of people who live in the household



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

SOCIO-DEMOGRAPHIC PROFILE

by migration status (VIII 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% | 11% | 12% |
| | 25-34 | 24% | 23% | 26% | 21% |
| | 35-44 | 29% | 28% | 31% | 29% |
| | 45-54 | 23% | 24% | 21% | 23% |
| | 55+ | 14% | 15% | 10% | 15% |
| Region (before the war) | East | 16% | 7% | 31% | 17% |
| | West | 15% | 19% | 8% | 23% |
| | Kyiv | 17% | 14% | 23% | 20% |
| | North | 10% | 9% | 12% | 8% |
| | Centre | 24% | 31% | 11% | 22% |
| | South | 17% | 19% | 16% | 11% |
| Income level | Below average | 59% | 62% | 57% | 37% |
| | Average | 30% | 28% | 30% | 43% |
| | Above average | 8% | 6% | 9% | 15% |
| | Prefer not to say | 4% | 4% | 3% | 4% |
| Marital status | Married / cohabiting | 59% | 59% | 59% | 52% |
| | Unmarried | 22% | 21% | 23% | 17% |
| | Divorced | 12% | 12% | 11% | 17% |
| | Widowed | 4% | 3% | 3% | 12% |
| | Prefer not to say | 4% | 5% | 4% | 2% |
| Presence of children under the age of 18 who live with the respondents | Yes | 44% | 42% | 46% | 57% |
| | No | 52% | 53% | 52% | 42% |
| | Prefer not to say | 4% | 5% | 2% | 0% |
| Number of people who live in the household | Live alone | 8% | 10% | 5% | 7% |
| | Live with one other person | 26% | 29% | 22% | 24% |
| | Live with two other people | 29% | 27% | 36% | 25% |
| | Live with three other people | 19% | 18% | 19% | 24% |
| | Live with 4 other people and more | 18% | 17% | 18% | 21% |
| | <i>Base, N</i> | 2060 | 1244 | 674 | 142 |

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



MOVING FORWARD
TOGETHER



Centre for
Economic
Recovery

Gradus

Research
Company



Advanter

