



Centre for
Economic
Recovery

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

Analytical report

September 2022

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



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

IX wave – 2028

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

IX wave – September 9 – September 11

V wave – July 15 – July 18

SUMMARY (1/4)

Ukrainians'* actions during the war

- In the ninth wave, **there were no recorded significant differences regarding the migration status of Ukrainians* compared to the previous wave**, either in general or at the level of regions: 60% of Ukrainians* **stayed at their permanent place** of residence (more often these are residents of the Center 80% and the West 73%); 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 – 33% and 26%), and 23% **continue to be far from home** (mainly these are residents of the East – 61%).
- The distribution of answers regarding migration directions also remained at the level of the previous wave: 64% of respondents migrated **to another oblast of Ukraine** (mainly to western oblasts), 17% migrated **within their own oblast**, and 19% **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 **remained in Ukraine** is at the level of the previous wave both in general and at the level of regions: 57% want to stay at their current place of residence, and 33% want to migrate (23% – within Ukraine, and 10% – abroad).
- **The opportunities to relocate** in the event of an exacerbation of the situation also remain unchanged (both in general and at the level of regions): 45% do not have this opportunity, 31% can migrate within Ukraine, and 20% can relocate abroad.
- 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 (62%), while **the share of those who want to stay at their new place** of residence **has decreased** (from 27% to 10%). The opportunities of staying abroad also remains unchanged: 69% have such an opportunity, 15% do not have it, and 16% hesitate to answer.
- **Safety** in the settlement and, conversely, its absence remain both the biggest **driver** (58%) and, accordingly, the biggest **barrier to the return to Ukraine of those who relocated abroad** (62%). In recent waves, the importance of drivers such as the availability of paid work and housing in Ukraine is decreasing, while the importance of business recovery in Ukraine is gradually increasing. The importance of barriers related to the lack of work in Ukraine and the availability of better living conditions in the host country is decreasing as well.
- The distribution of **internal migrants' answers** regarding the desire and opportunity to **stay in a new place** remains unchanged: the share of those who **want to return home** is 78%, and the share of those who want to stay is 15%; 47% have the opportunity to stay 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 – 25% and 15%, respectively. The level of respondents' own involvement in **volunteering** also did not change and is at 18%.

SUMMARY (2/4)

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

- **In the current wave, the main needs of Ukrainians* remain mostly unchanged** – the largest share of respondents mentioned **the need for money (66%) and access to work (31%)**. There were no significant changes in needs in general, compared to the previous wave of the study, but there are some shifts when it comes to particular audiences.
 - In general, those who migrated within Ukraine have more needs than those who stayed or relocated abroad. Internal migrants feel a greater need for finance (71%), work (39%), food (28%), a safe place to live (29%), and housing (26%). External migrants are less concerned about financial issues (47%, but this is still the main need) – for them, the problem of food products has become more urgent (21%, the importance of the factor increased by 11 p.p.). Among those who remain at home, the need for a safe place and for possibility to relocate abroad became less important (20% and 12%, respectively).
 - The East remains the region with the largest number of basic needs that are not being met. Compared to the previous wave, among residents of the Western and Northern regions, the need for relocation abroad is decreasing, while among residents of the East the same is happening with access to work. In the North of the country, there was an increase in the need for medicine and housing.
- **Subjective assessment of the state of physical and mental health remained without significant changes** in the current wave. About half of the respondents declare some problems with physical (49%) and mental (47%) health, more than a third (40% and 38%) assess their condition positively, and 11% (this figure decreased from 13%) and 15 %, respectively, say they have many issues.
- As for the feeling of safety, about a **third** of the respondents (32%, an increase from 27%) **feel safe at the moment** (a significantly larger share of this segment is among those Ukrainians who migrated abroad, but it significantly increased among those who stayed at home or migrated within the country as well), while **almost half of respondents** (44%, a decrease from 48%) note that they **sometimes feel unsafe**, and 16% (decreased from 19%) declare that they **do not feel safe**. The increase in the feeling of safety took place in such regions as the East (+6 p.p., although the figure itself is one of the lowest), Kyiv (+11 p.p., due to the decrease of those who constantly / predominantly feel unsafe) and the South (+8 p.p. due to the decrease of those who sometimes feel unsafe).
- According to respondents who **had the experience of relocation, the majority of the local population treated them kindly** in their new place (the number increased from 83% to 87%).
- **Humanitarian aid** from the Ukrainian state was received by 34% of respondents (69% in the East and 48% in the North), and this indicator is stable in the current wave. This assistance was mainly **in the form** of food (80%) and money (45%). Among those who received humanitarian aid, 47% consider it sufficient and 44% – insufficient (the indicator decreased from 50%; among residents of the East, the share of such people is higher and is 54%, but it also decreased by 10 p.p.).
- When it comes to **external migrants**, 63% of them **received humanitarian aid** from the government of the state to which they relocated. This was mostly money assistance (87%), food (70%), hygiene and sanitation products (58%), temporary housing (52%) and clothes (50%). The majority of respondents (69%) evaluate this assistance as sufficient.

SUMMARY (3/4)

Perception of the full-scale war with Russia

- In the current wave, there was an **increase in the share of those who assess the actions of the authorities since the beginning of Russia's war against Ukraine as effective** (65%, an increase by 4%) and **in the field of military protection of the country** against the aggressor (69%, an increase by 4%). In addition, **there was a slight increase** in the share of those who highly **evaluate the actions of the authorities** with regard to **aiding** citizens of Ukraine who **lost property** during the war (it is now at 35%). Meanwhile, the actions of the authorities with regard to aiding citizens of Ukraine who lost their jobs and income during the war is evaluated as effective by the smallest share of the respondents (31%).
- **In general, the largest share of respondents continues to trust the Armed Forces of Ukraine (62%) and the President of Ukraine (44%).** At the same time, the highest level of trust in them is recorded among the audience of 55 years and older. Compared to the previous wave, there was an increase in the level of trust in international organizations (+4%) and mass media (+2%).
- **Ukrainians continue to be optimistic about the future** – 60% believe that after the victory, Ukraine will be able to build a strong economy, and the same percentage are sure that Ukraine will soon become a member of the European Union. In addition, 57% believe that the state will rebuild everything after the war or reimburse the costs of reconstruction. The highest evaluations of belief in a bright future were recorded among the youngest audience (18-24 years old).

SUMMARY (4/4)

Latest news

- Over the past week, the most important events that were spontaneously mentioned by the respondents were the **counter-offensive of the Armed Forces of Ukraine / liberation of the territory of Ukraine** (34% spontaneously mentioned this event) and the **offensive of the Armed Forces of Ukraine in Kharkiv Oblast** (16% mentioned it).
- With a prompt, the most important events in the last week were counteroffensives of the Armed Forces of Ukraine in Kherson (75%) and Kharkiv (75%) oblasts. As for other events of the week, half of the respondents indicated that they knew about the publication of the IAEA report after the visit to the Zaporizhzhya NPP, and 45% knew about the explosion at the ammunition exhibition in Chernihiv. Larger share of those who know about these events is among the 55+ audience.
- **The majority** of respondents (74%) declared that **there were no events that influenced their intentions to relocate**, and 19% indicated that the events had impact on their migration intentions. Regarding those who do want to migrate, 35% indicated that they plan to return to their permanent place of residence and 32% indicated that they plan to relocate further within Ukraine.

Employment during the war

- **60% of surveyed Ukrainians* are employed, and this share has remained without significant changes.** There are more of those employed among residents of the Central and Western regions as well as the residents of Kyiv.
- The majority of the employed audience continues to receive a salary (78%), but only a third (28%) are confident that they will continue to receive it, while 49% do not have such confidence. A greater share of those who are confident that they will receive payment in the future is observed among external migrants (51%) and residents of the Western region (40%).
- **77% of respondents declare a decrease in their income since the beginning of the full-scale invasion.** The largest share of the audience whose income has decreased is recorded among internal migrants (84%) and those 45 and older.

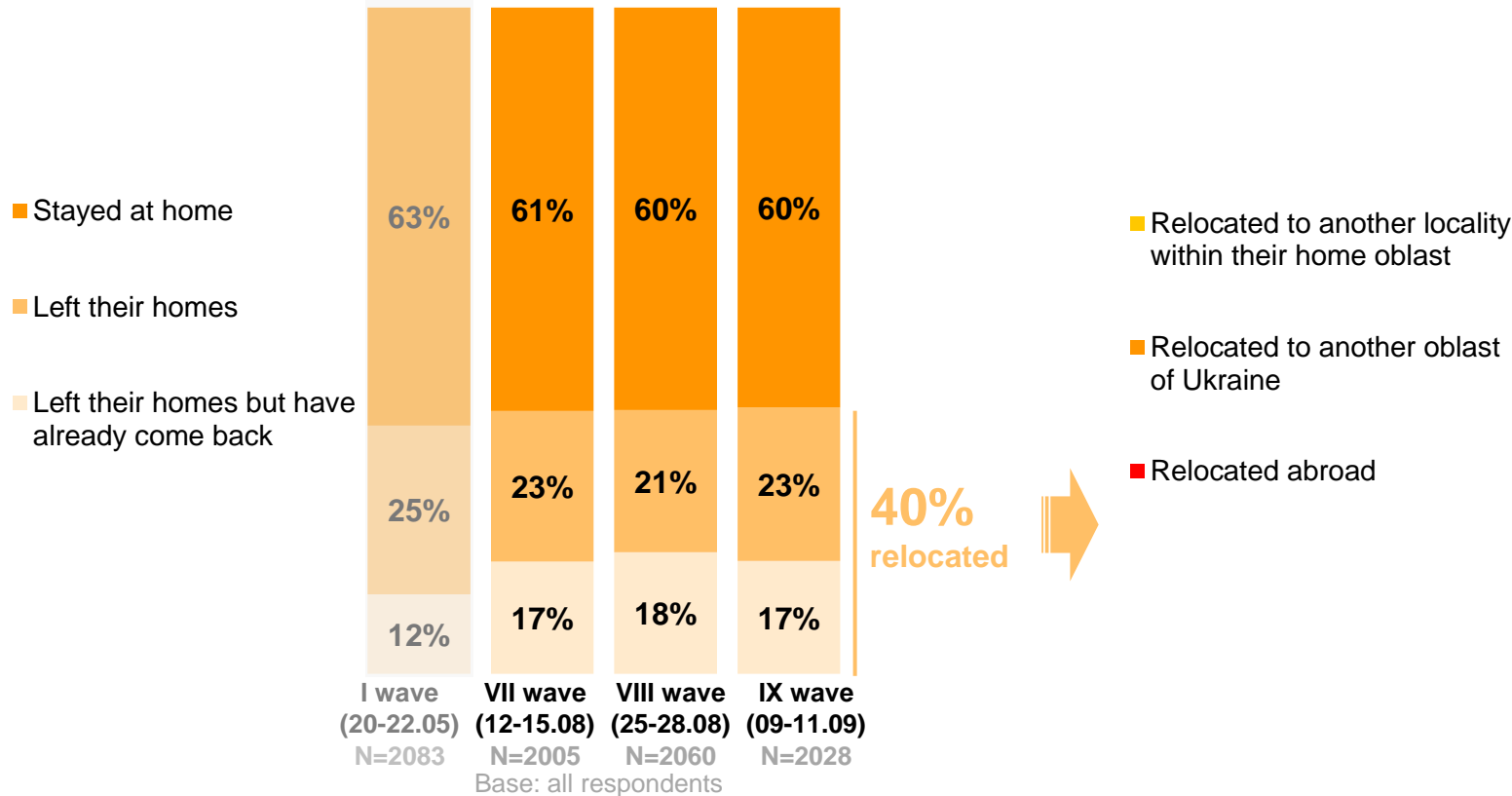
UKRAINIANS'* ACTIONS DURING THE FULL-SCALE WAR

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

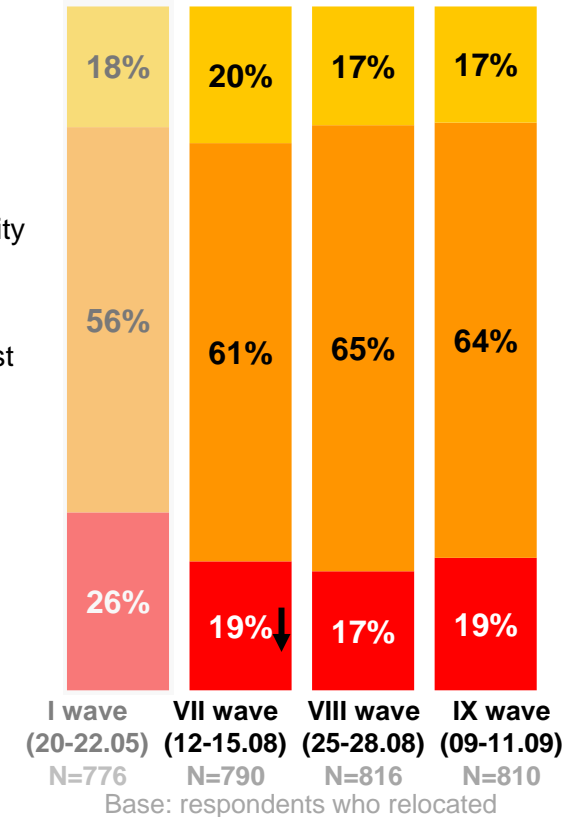
RELOCATION OF UKRAINIANS* DUE TO THE WAR

In the ninth wave, there were no significant differences in migration processes compared to the previous wave: 60% of respondents declared that they stayed at home, 40% - that they changed their place of residence (23% of them continue to stay in their new place, and 18% have already returned). The migration directions also remain unchanged: 19% relocated to another settlement within their oblast, 64% - to another oblast, and 17% - abroad.



Relocation of Ukrainians* due to the war



Relocation specifics



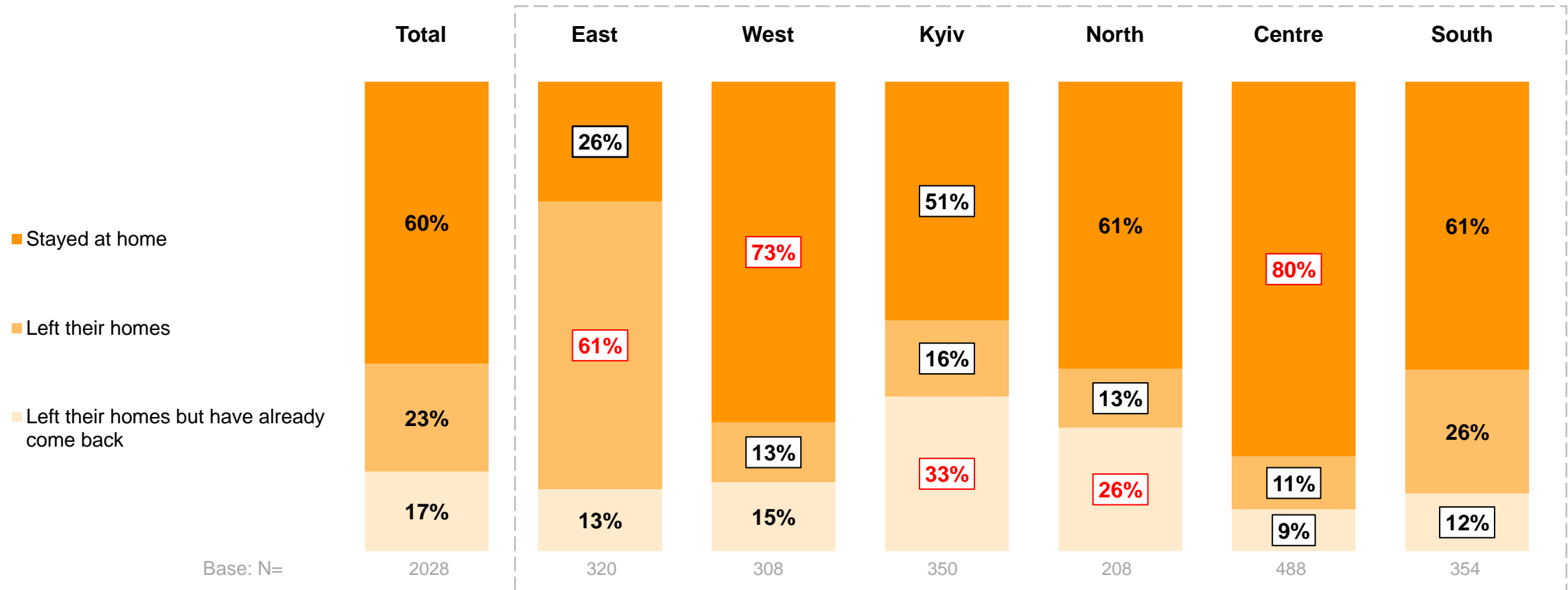
*Ukrainians - residents of cities with population of 50 thousand and more, aged 18+ years, who use smartphones
 Which of the following phrases best reflects your actions in the situation of Russia's war against Ukraine:
 In which direction were you forced to move:



 Numbers that are statistically significantly **higher** / **lower**, compared to the previous 8 wave of the study

RELOCATION DUE TO THE WAR

by regions



Regional differences in relocation still remain without significant changes. Residents of the West and Center stayed at their permanent place of residence more often than Ukrainians* in general (the majority of residents of the South also declare that they stayed at home - at the level of Ukraine* in general); while residents of the East - left their homes more often; 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

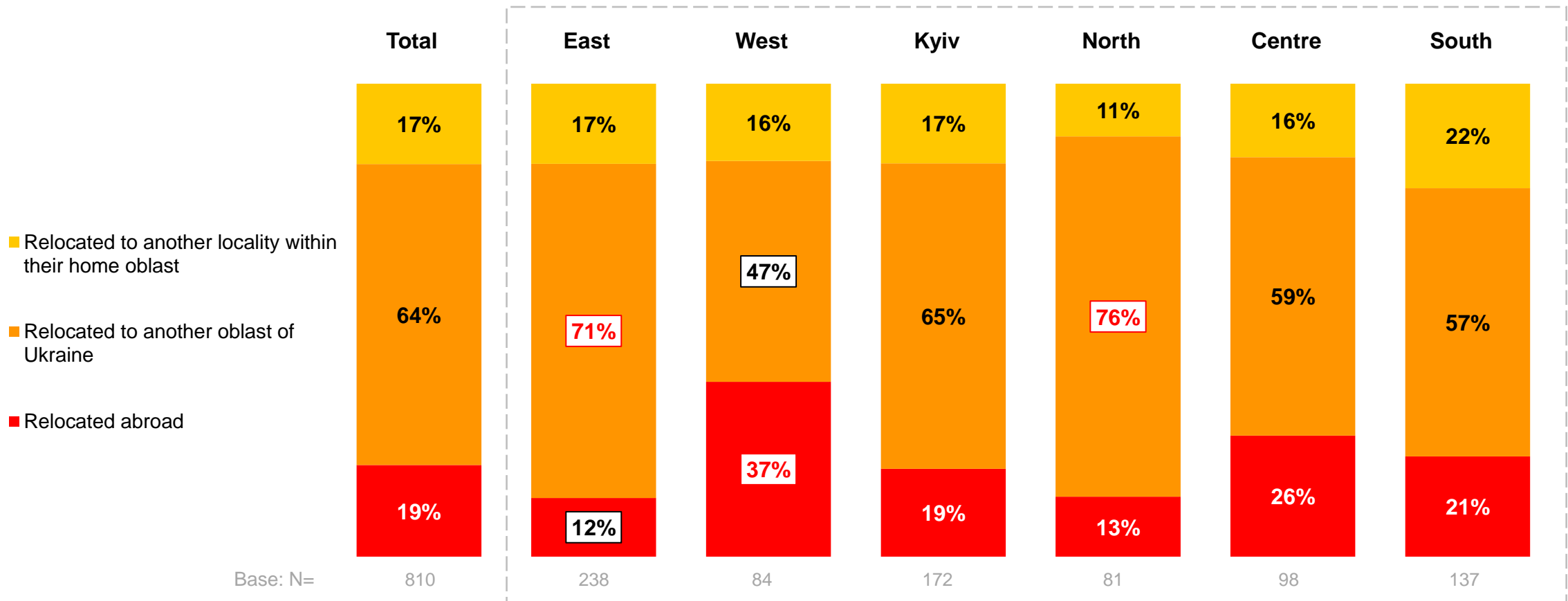
Which of the following phrases best reflects your actions in the situation of Russia's war against Ukraine:

 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



In the ninth wave, there was no recorded significant dynamics in the regional distribution of directions of relocation. Regional peculiarities remain the same: residents of the West declare relocating abroad more often than Ukrainians* in general; residents of the East and North - to another oblast; and the majority of the residents of Kyiv and the Central and Southern regions relocate to another oblast, although their share does not significantly differ from the indicators for Ukraine* in general.



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

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 and Cherkasy oblasts remain the most popular oblasts for internal migration. Respondents often migrate either to the West or to neighboring oblasts (for example, from Mykolaiv to Odesa, from Kyiv to Zhytomyr oblast).

		Oblast from which relocated																			
		Total	Kyiv city	Kharkiv oblast	Donetsk oblast	Dnipropetrovsk oblast	Chernihiv oblast	Mykolaiv oblast	Luhansk oblast	Odesa oblast	Zaporizhzhia oblast	Kyiv oblast	Kherson oblast	Cherkasy oblast	Lviv oblast	Zhytomyr oblast	Rivne oblast	Ivano-Frankivsk oblast	Volyn oblast	Sumy oblast	Poltava oblast
Oblast to which relocated (TOP-13)	Lviv oblast	15%	12%	8%	6%	24%	3%	8%	0%	57%	39%	41%	12%	0%	0%	11%	42%	57%	29%	57%	0%
	Cherkasy oblast	10%	9%	2%	14%	15%	58%	6%	3%	0%	2%	9%	0%	0%	0%	0%	0%	0%	0%	0%	19%
	Zakarpattia Oblast	9%	15%	6%	1%	2%	0%	0%	31%	0%	14%	16%	0%	2%	25%	53%	0%	11%	11%	12%	0%
	Ivano-Frankivsk oblast	8%	12%	14%	2%	13%	1%	0%	0%	0%	5%	0%	41%	0%	17%	5%	0%	0%	35%	0%	0%
	Vinnitsia oblast	7%	7%	4%	14%	7%	0%	0%	0%	15%	3%	4%	0%	50%	0%	0%	0%	0%	0%	0%	0%
	Kyiv city	7%	0%	13%	14%	0%	5%	6%	21%	3%	0%	0%	15%	0%	0%	0%	13%	0%	0%	25%	11%
	Ternopil oblast	5%	5%	2%	16%	0%	0%	0%	0%	0%	0%	0%	0%	0%	17%	18%	32%	16%	0%	0%	26%
	Dnipropetrovsk oblast	4%	1%	12%	16%	0%	0%	0%	3%	0%	9%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Kirovohrad oblast	4%	1%	5%	4%	4%	0%	19%	7%	0%	0%	0%	0%	43%	0%	0%	0%	0%	0%	0%	19%
	Chernivtsi oblast	4%	5%	9%	0%	8%	0%	0%	0%	2%	4%	8%	0%	0%	3%	0%	13%	8%	0%	0%	25%
	Volyn oblast	4%	4%	3%	0%	15%	6%	3%	0%	0%	18%	3%	0%	0%	12%	0%	0%	8%	0%	0%	0%
	Zhytomyr oblast	4%	15%	0%	0%	0%	0%	0%	4%	7%	0%	6%	0%	0%	7%	0%	0%	0%	0%	0%	0%
	Kyiv oblast	4%	0%	3%	7%	0%	17%	0%	6%	0%	2%	2%	32%	0%	0%	0%	0%	0%	0%	0%	0%
	Odesa oblast	3%	0%	0%	2%	2%	0%	42%	17%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Rivne oblast	2%	0,3%	1%	1%	0%	2%	16%	0%	5%	0%	7%	0%	0%	10%	0%	0%	0%	26%	0%	0%
Base: respondents who relocated to another oblast of Ukraine		516	111	83	63	35	32	27	22	19	18	14	14	12	12	9	9	6	6	6	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, Germany and Slovakia remain the most common destinations of immigration.

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

		Oblast from which relocated										
		Total	Kyiv city	Dnipropetrovsk oblast	Donetsk oblast	Odesa oblast	Kharkiv oblast	Zakarpattia oblast	Zaporizhzhia oblast	Lviv oblast	Volyn oblast	Rivne oblast
Country to which relocated (TOP-16)	Poland	22%	27%	17%	46%	24%	23%	0%	6%	0%	0%	10%
	Germany	20%	18%	14%	6%	3%	9%	0%	43%	67%	52%	22%
	Slovakia	10%	1%	49%	0%	0%	5%	42%	0%	0%	0%	0%
	Great Britain	4%	14%	0%	0%	0%	0%	0%	6%	0%	0%	0%
	Israel	4%	0%	0%	5%	5%	0%	52%	0%	0%	0%	0%
	Lithuania	3%	3%	0%	0%	0%	14%	0%	23%	0%	0%	0%
	Austria	3%	0%	0%	4%	25%	0%	0%	0%	0%	20%	0%
	France	3%	4%	0%	0%	0%	17%	0%	0%	0%	0%	0%
	Latvia	3%	0%	0%	25%	0%	8%	0%	0%	0%	0%	0%
	Belgium	3%	13%	0%	0%	0%	5%	0%	0%	0%	0%	0%
	Italy	3%	2%	0%	0%	0%	0%	0%	6%	12%	0%	0%
	Bulgaria	2%	0%	3%	0%	18%	5%	0%	0%	6%	0%	0%
	Romania	2%	0%	2%	0%	16%	0%	0%	0%	0%	0%	0%
	Netherlands	2%	0%	0%	11%	0%	14%	0%	0%	0%	0%	0%
	Turkey	2%	5%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	USA	2%	2%	0%	0%	0%	0%	0%	0%	0%	28%	0%
Base: respondents who relocated to another country		157	32	20	16	13	10	9	7	7	6	5

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

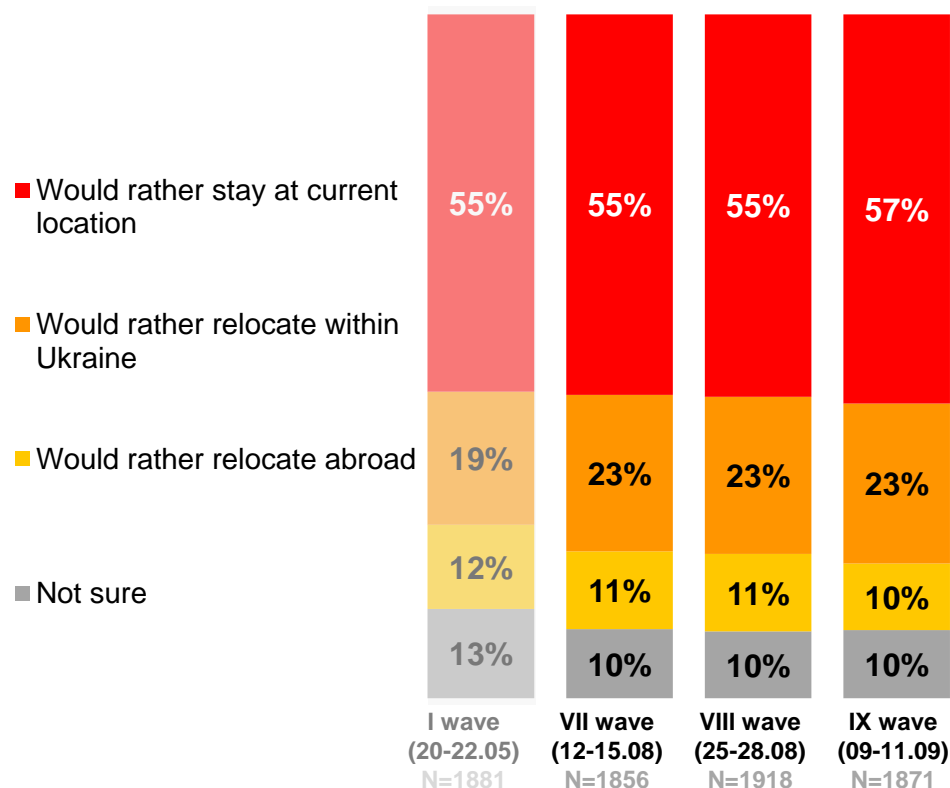
* Insufficient base for analysis
(observation of trend)

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

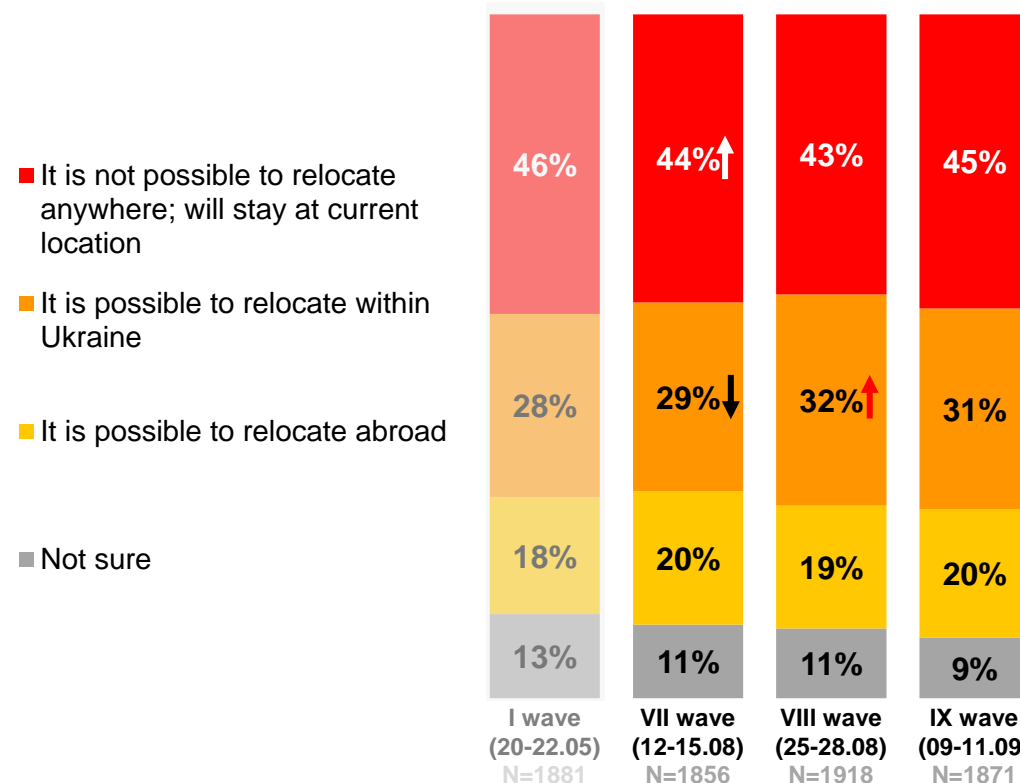
RELOCATION IN CASE OF AGGRAVATION. WISHES & OPPORTUNITIES

Migration attitudes and opportunities to relocate in the event of an aggravation of the situation remain unchanged. Thus, a little more than half (57%) of the respondents want to stay where they are now, and a fourth part (23%) want to migrate within Ukraine. Regarding the opportunity of relocation, 45% do not have such opportunity, a third (31%) claim that they have the opportunity to migrate within Ukraine, and only 20% have the opportunity to relocate abroad.

**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?

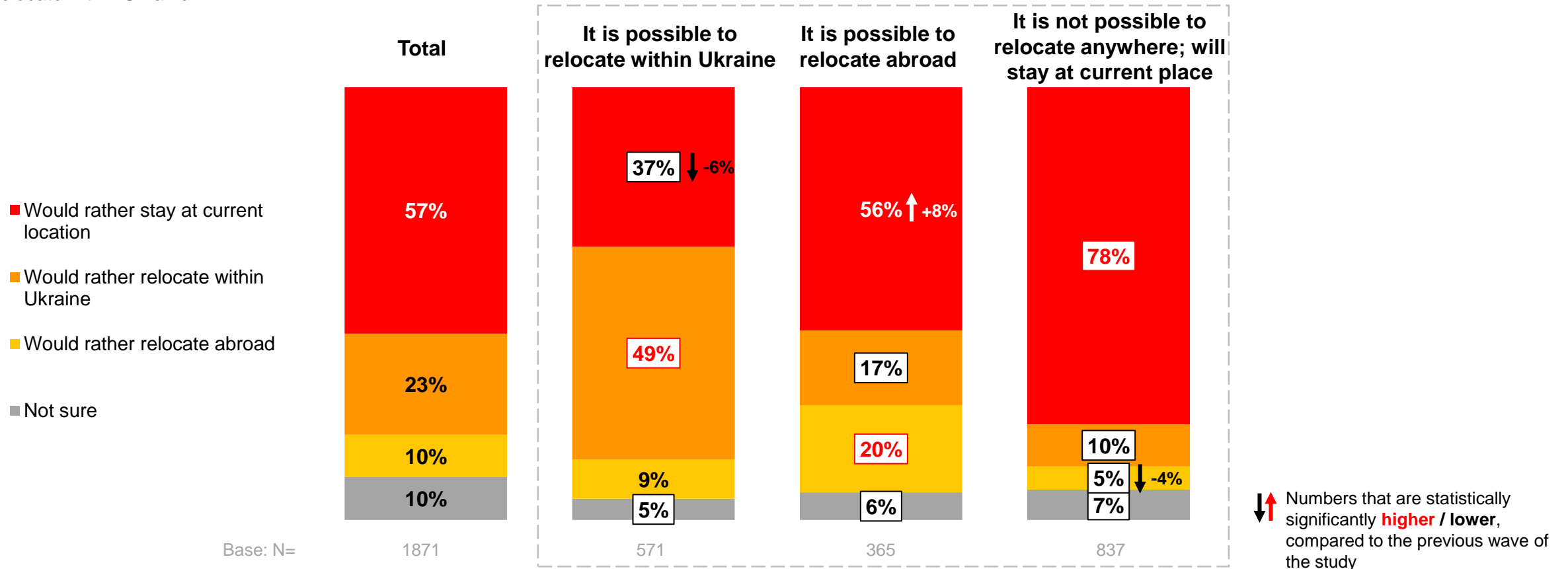
In case of further exacerbation, is it possible for you to relocate further away, go abroad or stay where you are now?

 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

Among those who do not have the opportunity to relocate, 78% want to stay at their place. Among those who have the opportunity to relocate abroad, half (56%) want to stay where they are (and they have increased by 8 percentage points compared to the previous wave) and 20% want to relocate abroad (this is the largest share among the groups). Those who have the opportunity to relocate only within Ukraine, the smallest share of those who want to stay (37% and this indicator decreased by 6 pp), almost half of these people want to relocate within Ukraine.



Base: respondents who stayed at home or relocated within Ukraine

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

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

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

RELOCATION IN CASE OF AGGRAVATION. WISHES & OPPORTUNITIES

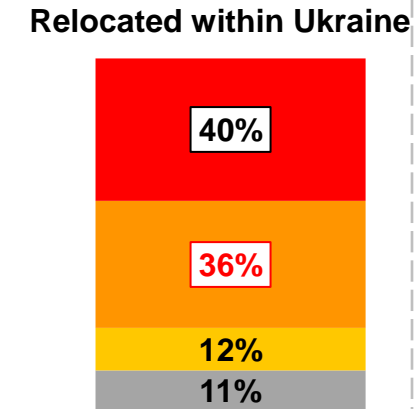
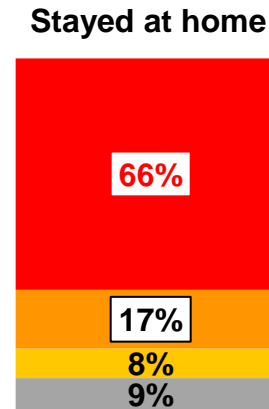
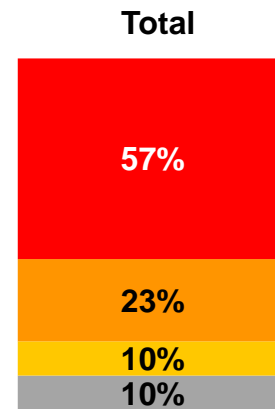
by migration status

Among groups by migration status, there are no dynamics in attitudes and opportunities to migrate, compared to the previous wave.

IDPs* more often have both the intention and the opportunity to change their place of residence within Ukraine in the event of an aggravation of the situation.

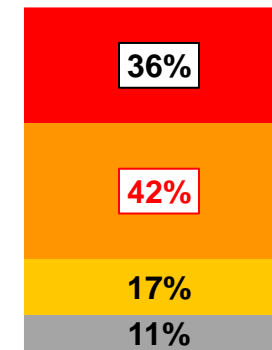
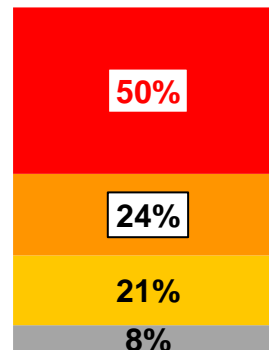
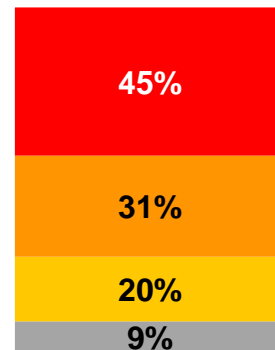
In case of aggravation of the situation **would rather...**

- 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



Base: N=

1871

1217

653

*IDPs – Internally Displaced Persons

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



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



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

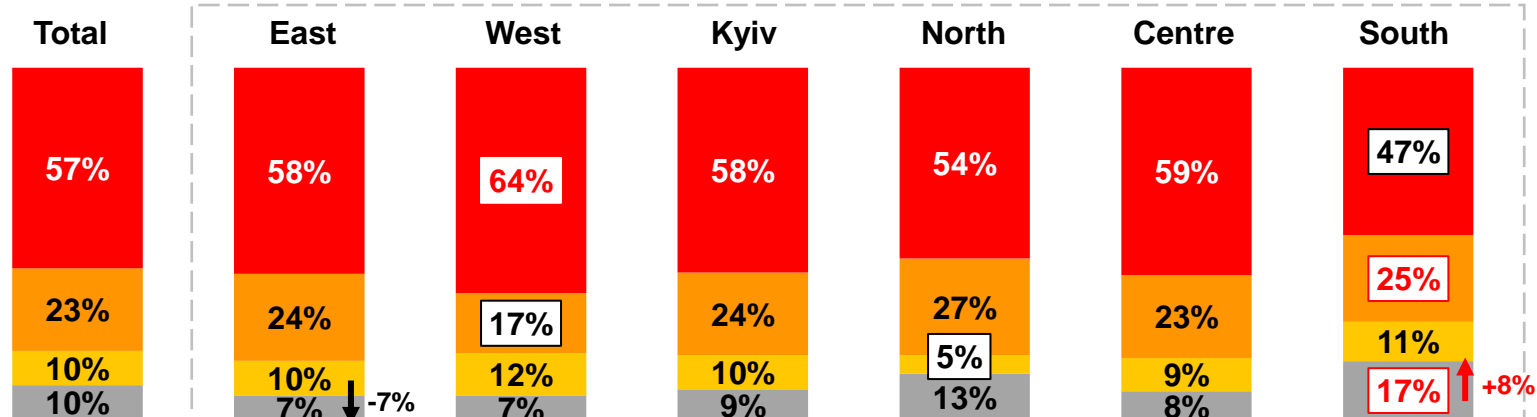
RELOCATION IN CASE OF AGGRAVATION. WISHES & OPPORTUNITIES

by region

There were no significant dynamics with regard to migration attitudes in the event of an aggravation of the situation by regions. A significantly larger share of the residents of the Western region still want to stay in their current place of residence (64%), while the share of such people among the residents of the South is significantly smaller (47%), but there are more people who want to relocate within Ukraine. As for relocation opportunities, compared to the previous wave, the share of residents of the Centre who have the opportunity to move abroad has significantly decreased (by 5 percentage points). At the same time, general regional peculiarities remain unchanged.

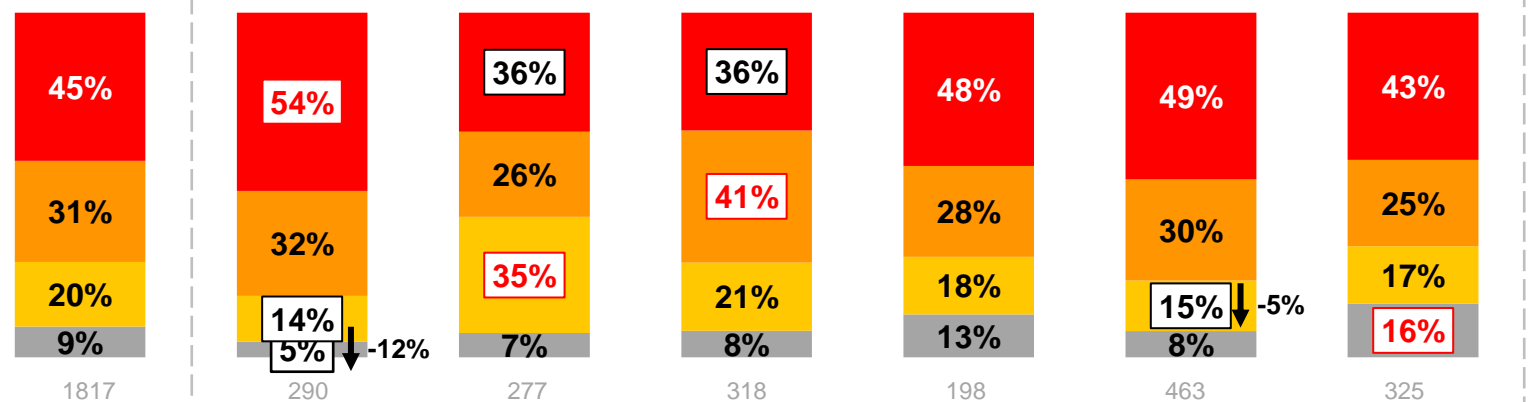
In case of aggravation of the situation **would rather...**

- 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=

1817

290

277

318

198

463

325

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?

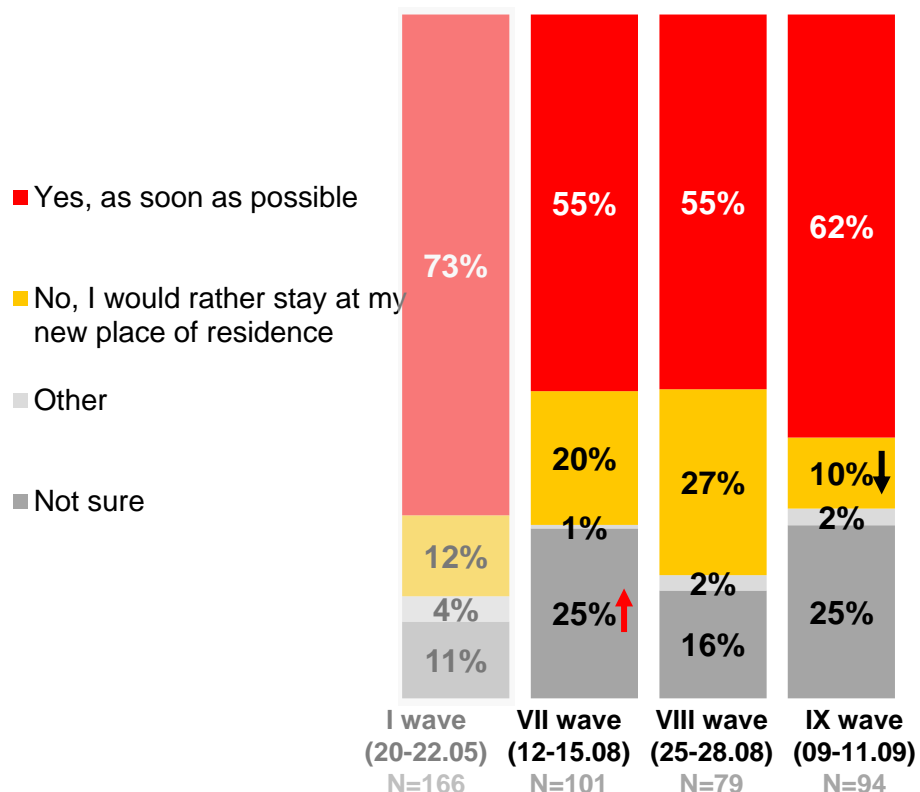
Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

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

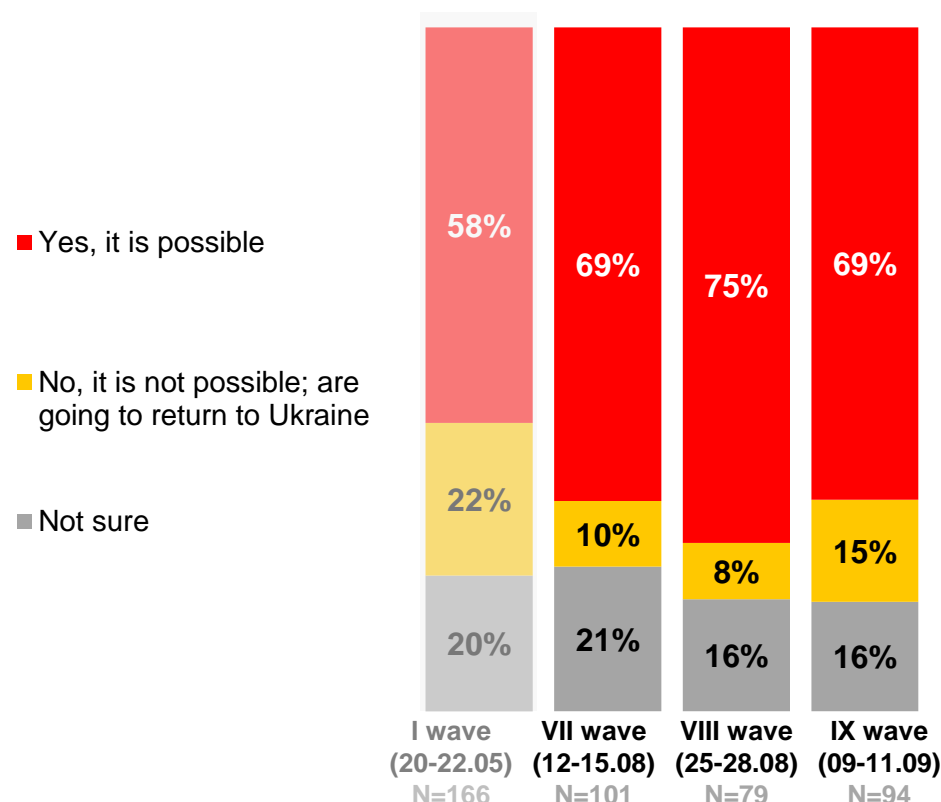
WISHES REGARDING COMING BACK FROM ABROAD. POSSIBILITY OF STAYING THERE

Compared to the previous wave of the study, the share of those who want to stay in their new place of residence has decreased in the current wave (from 27% to 10%). In general, the majority of respondents (62%) want to return at the first opportunity. At the same time, 69% of respondents have the opportunity to stay and live abroad.

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?

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

DRIVERS OF RETURNING TO UKRAINE



The top 3 most popular drivers for returning home among external migrants are a safe situation in the place of residence, return to normal life and love for Ukraine. In recent waves, the importance of such factors as the availability of paid work and housing in Ukraine is decreasing, while the importance of business recovery in Ukraine is gradually increasing.

	VI wave (29.07-1.08) N=120	VII wave (12-15.08) N=101	VIII wave (25-28.08) N=79	IX wave (09-11.09) N=94
Safety of my locality	59% ↑	74% ↑	58% ↓	58%
Return home (to normal life)	50%	53%	50%	42%
Love for Ukraine	26%	39% ↑	32%	41%
Availability of paid work in Ukraine	35%	50% ↑	47%	32%
Willingness to live and grow in Ukraine	30%	33%	33%	31%
Availability of housing in Ukraine	36%	51% ↑	37%	29%
Reunion with family	25%	35%	27%	28%
Availability of development prospects in Ukraine	36% ↑	33%	30%	27%
Resumption of business in Ukraine	16%	15%	18%	24%
Better access to health care in Ukraine	19%	29%	20%	23%
Lower cost of living in Ukraine	21%	30%	16% ↓	23%
Better access to school education in Ukraine*	6%	10%	9%	7%
Better access to high education in Ukraine*	2%	8%	6%	5%

*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?

 ↑ Numbers that are statistically significantly **higher** / 18
 ↓ **lower**, compared to the previous wave of the study

BARRIERS TO RETURNING TO UKRAINE

As for the main barriers to returning to Ukraine, the situation remains without significant changes. The main restraining factor is the lack of conditions for a safe life. At the same time, the importance of barriers related to the lack of work in Ukraine and the availability of better living conditions in the host country is decreasing in the long-term dynamics.

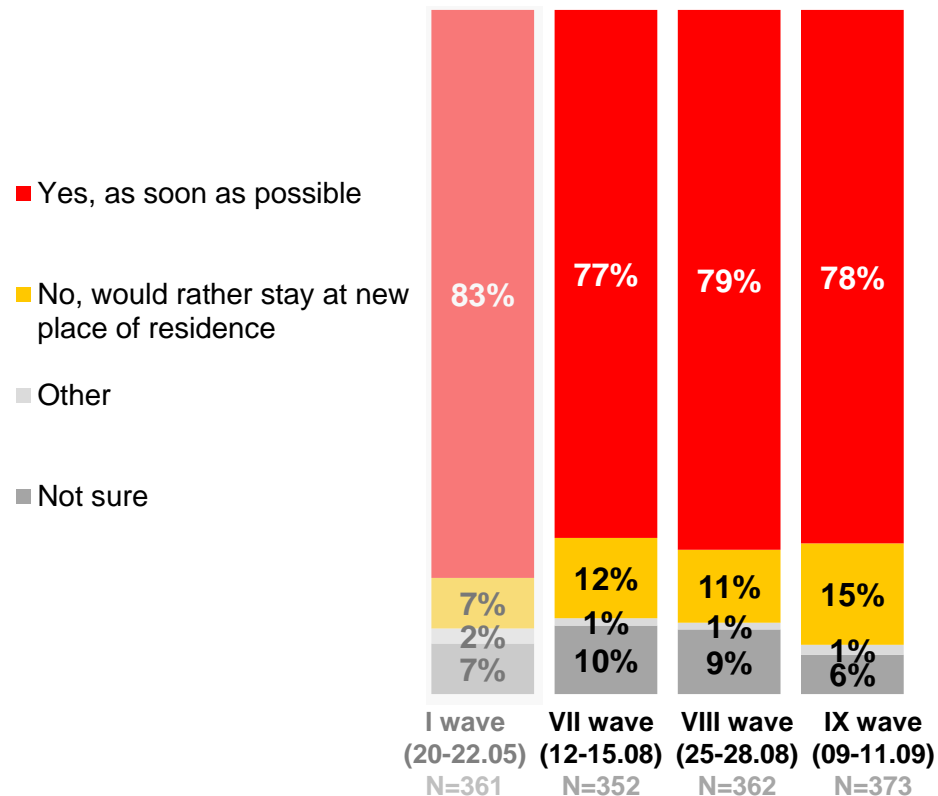
	VI wave (29.07-1.08) N=120	VII wave (12-15.08) N=101	VIII wave (25-28.08) N=79	IX wave (09-11.09) N=94
Lack of conditions for a safe life in Ukraine	79% ↑	79%	66%	62%
Absence of a paid job in Ukraine	39%	51%	37%	29%
Better living conditions in the country where I currently am	23%	31%	28%	20%
Absence / loss of residence in Ukraine	17%	17%	17%	19%
Availability of residence in the country where I currently am	6%	10%	5%	13%
Having a paid job in the country where I currently am	11%	27% ↑	16%	12%
Availability of development prospects abroad	8%	19% ↑	15%	8%
Inability to go abroad again	14%	18%	13%	7%
Lack of access to quality education in Ukraine	7%	5%	6%	4%
Lack of access to quality healthcare in Ukraine	10%	5%	9%	4%

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

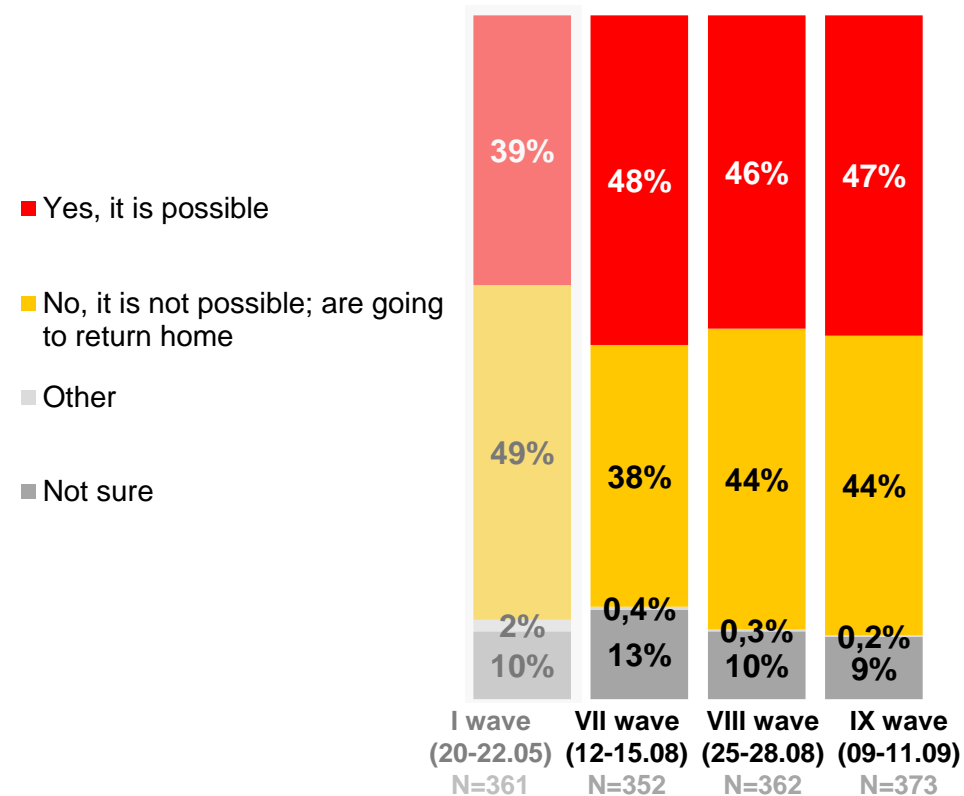
INTERNALLY DISPLACED PERSONS' WISHES REGARDING COMING BACK. POSSIBILITY OF STAYING WHERE THEY ARE

The distribution of answers regarding the desire of IDPs* to change their current place of residence remained without significant changes. Thus, 78% want to return home at the first opportunity, and 15% want to stay and live at their new place. The distribution of answers regarding the possibility of staying in the new place also has not changed significantly - about half (47%) have such a possibility, and almost the same number (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

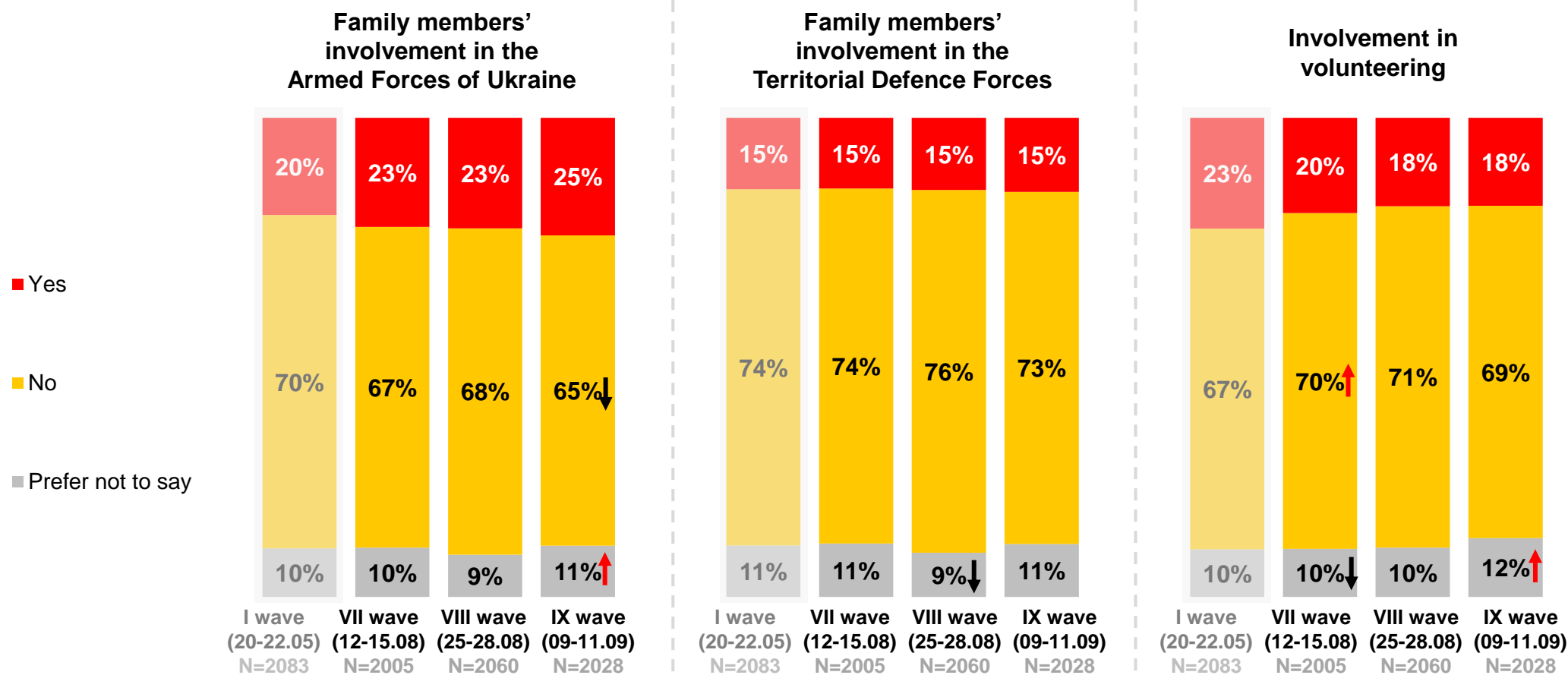
Do you want to return to your permanent place of residence when/if the hostilities there are over?

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 of Ukraine (25%), Territorial Defense (15%) and the level of their own participation in volunteer activities (18%) remain without significant changes. However, the share of those who do not have family members in the Armed Forces of Ukraine decreased (from 68% to 65%) due to refusal to answer the question.



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?

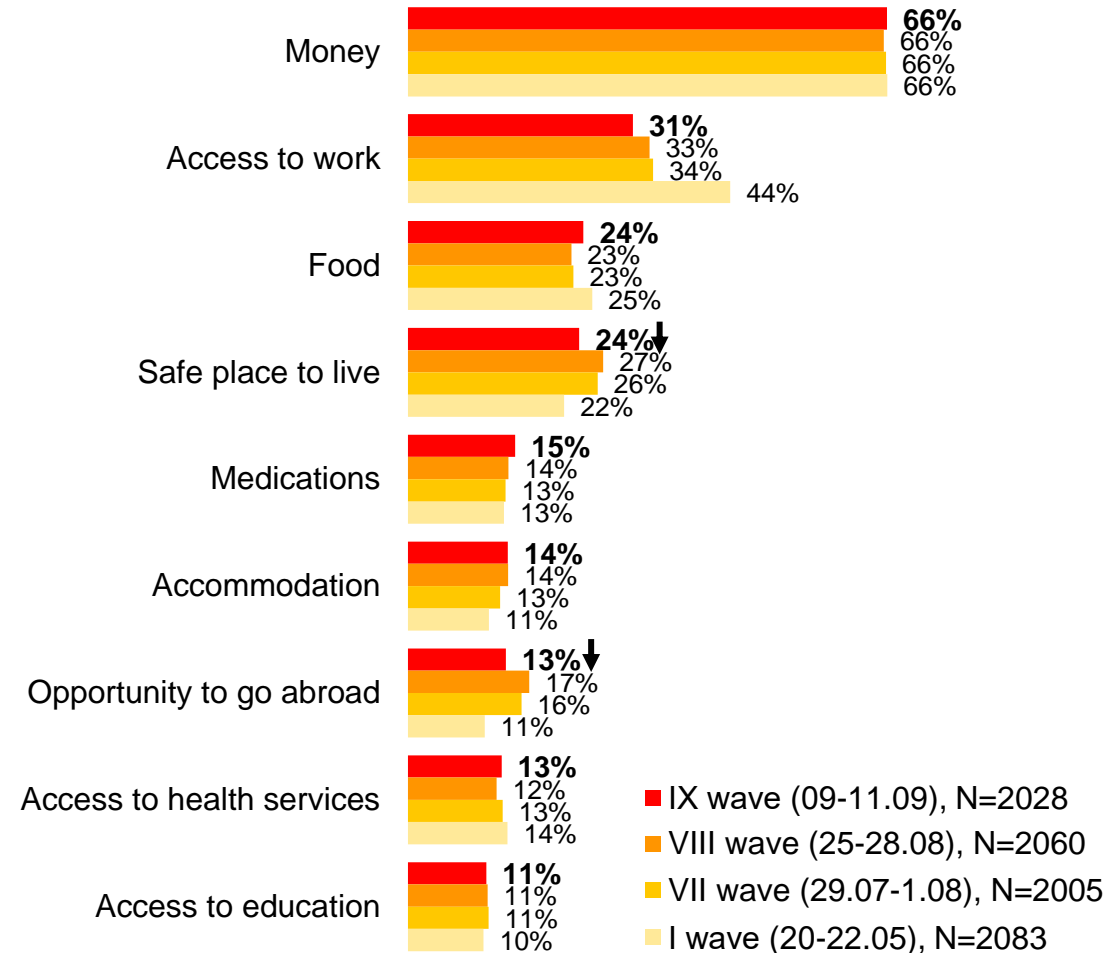


 Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

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

The rating of the needs most felt by respondents and their families remains unchanged compared to the previous wave. More than half of the respondents feel the need for money (66%) and this is the biggest need, and about a third - for access to work (31%).



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

FAMILIES' NEEDS

by migration status


Those who relocated within Ukraine have more needs than those who stayed or moved abroad. Internal migrants have a greater need for finance, work, food and a safe place to live / housing. External migrants are less concerned about financial issues (although this is still the main need) and access to medicine, like other groups, they feel the lack of work, food (the importance of the factor increased by 11 p.p.) and a safe place to live. Among those who stay at home, the need for a safe place (-5 p.p.) and the possibility of going abroad (-4 p.p.) became less important.


	Total	Stayed at home*	Relocated within Ukraine	Relocated abroad
Money	66%	66%	71%	47%
Access to work	31%	27%	39%	27%
Food	24%	23%	28%	21% ↑ +11%
Safe place to live	24% ↓ -3%	20% ↓ -5%	29%	27%
Medications	15%	14%	17%	9%
Accommodation	14%	7%	26%	16%
Opportunity to go abroad	13% ↓ -3%	12% ↓ -4%	17%	8%
Access to health services	13%	12%	15%	13%
Access to education	11%	10%	14%	9%
Base: N=	2028	1217	653	157

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

Base: all respondents

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

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

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

FAMILIES' NEEDS

by region

Compared to the previous wave, among residents of the Western region and the North, the need for relocation abroad is decreasing; and among the residents of the East - need for access to work. In the North, there was an increase in the importance of the need for medicine and housing. The East remains the region with the largest number of basic needs.

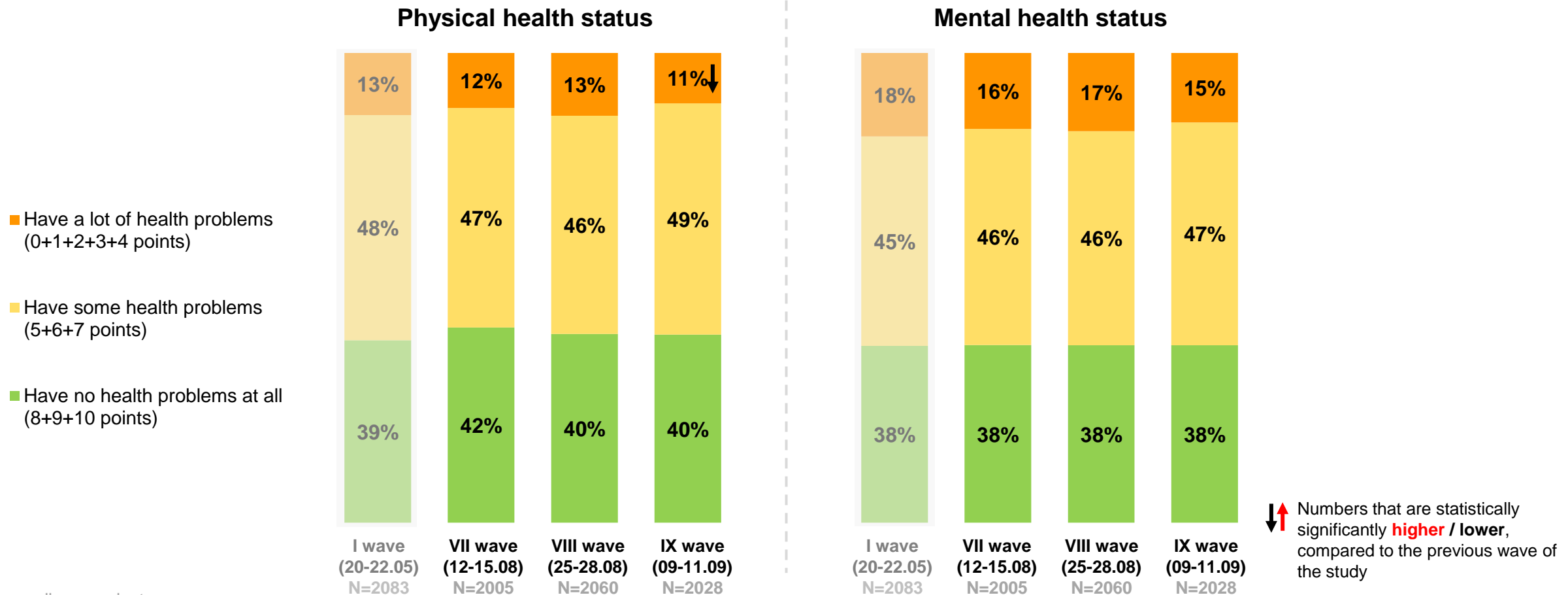
	Total	East	West	Kyiv	North	Centre	South
Money	66%	75%	58%	64%	65%	67%	66%
Access to work	31%	38% ↓ -10%	28%	29%	36%	26%	34%
Food	24%	33%	19%	23%	18%	21%	29%
Safe place to live	24% ↓ -3%	32%	18%	22%	20%	19%	30%
Medications	15%	23%	12%	11%	13% ↑ +7%	12%	18%
Accommodation	14%	31%	11%	13%	10% ↑ +5%	9%	11%
Opportunity to go abroad	13% ↓ -3%	16%	12% ↓ -8%	16%	5% ↓ -5%	13%	16%
Access to health services	13%	17%	9%	13%	9%	11%	18%
Access to education	11%	13%	8%	12%	11%	12%	9%
Base: N=	2028	320	308	350	208	488	354

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 almost without changes compared to the previous wave: about half of the respondents declare that they have some problems with physical (49%) and mental (47%) health, more than a third (40% and 38%) positively assess their condition, while 11% (and this level decreased from 13%) and 15 % respectively - declare the presence of many problems.



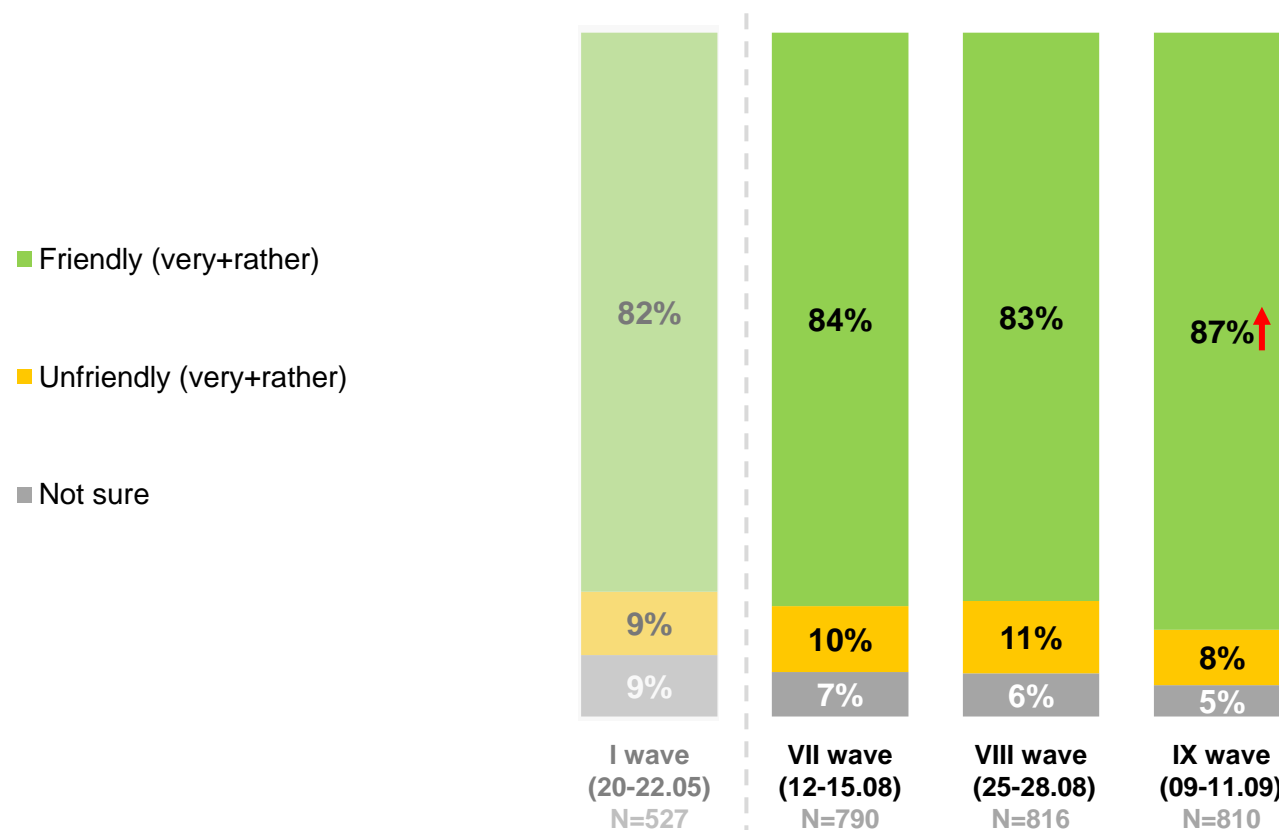
Base: all respondents

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 and is growing dynamically: 87% of the audience that changed their place of residence assesses the attitude of the local population towards them as rather or very friendly (an increase from 83% to 87%).



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

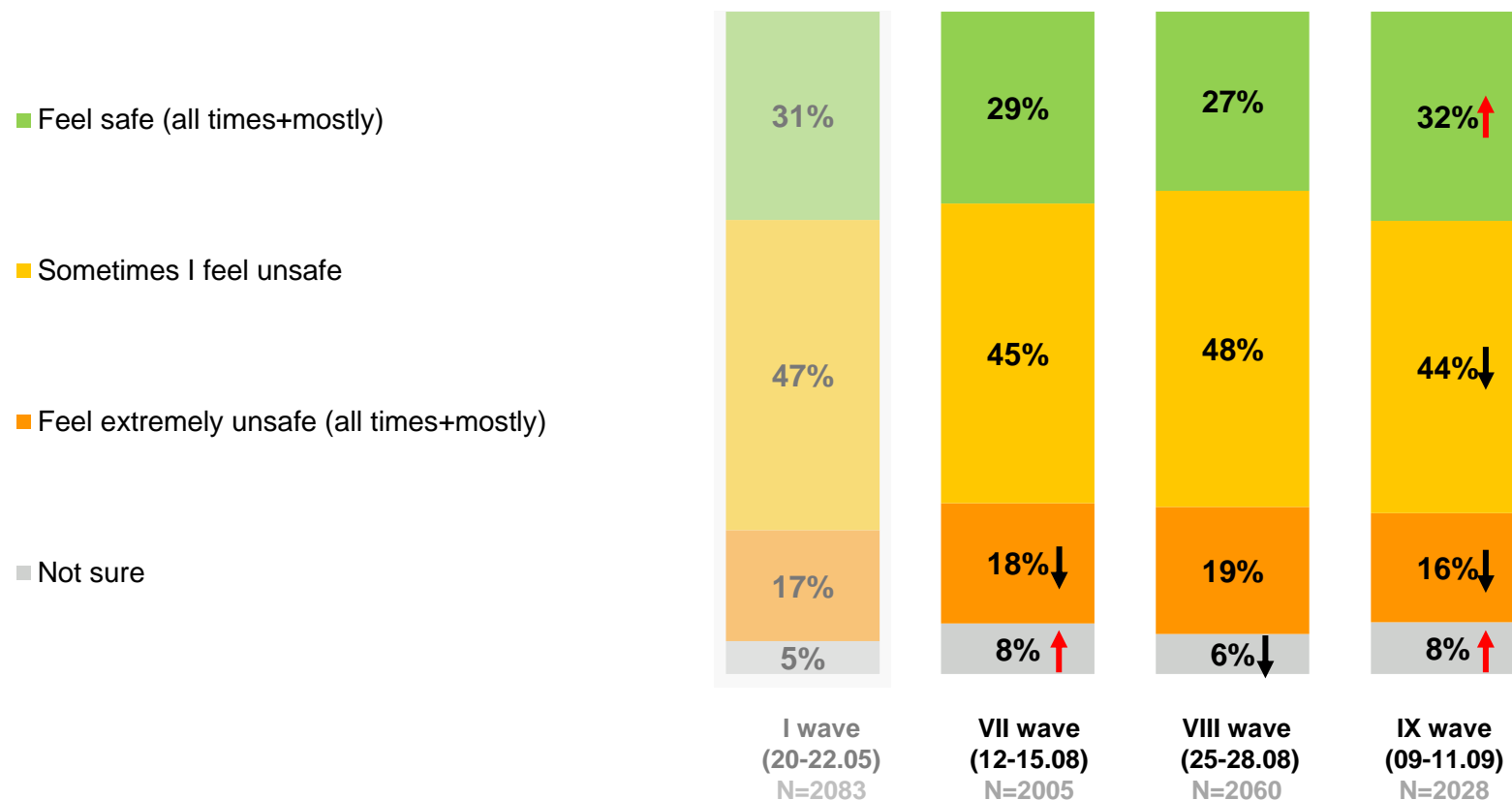
Base: respondents who changed their locations

*In all waves except the first, there were interviewed those who stayed at the new place of residence or already returned home, in the first wave - only those who stayed at the 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

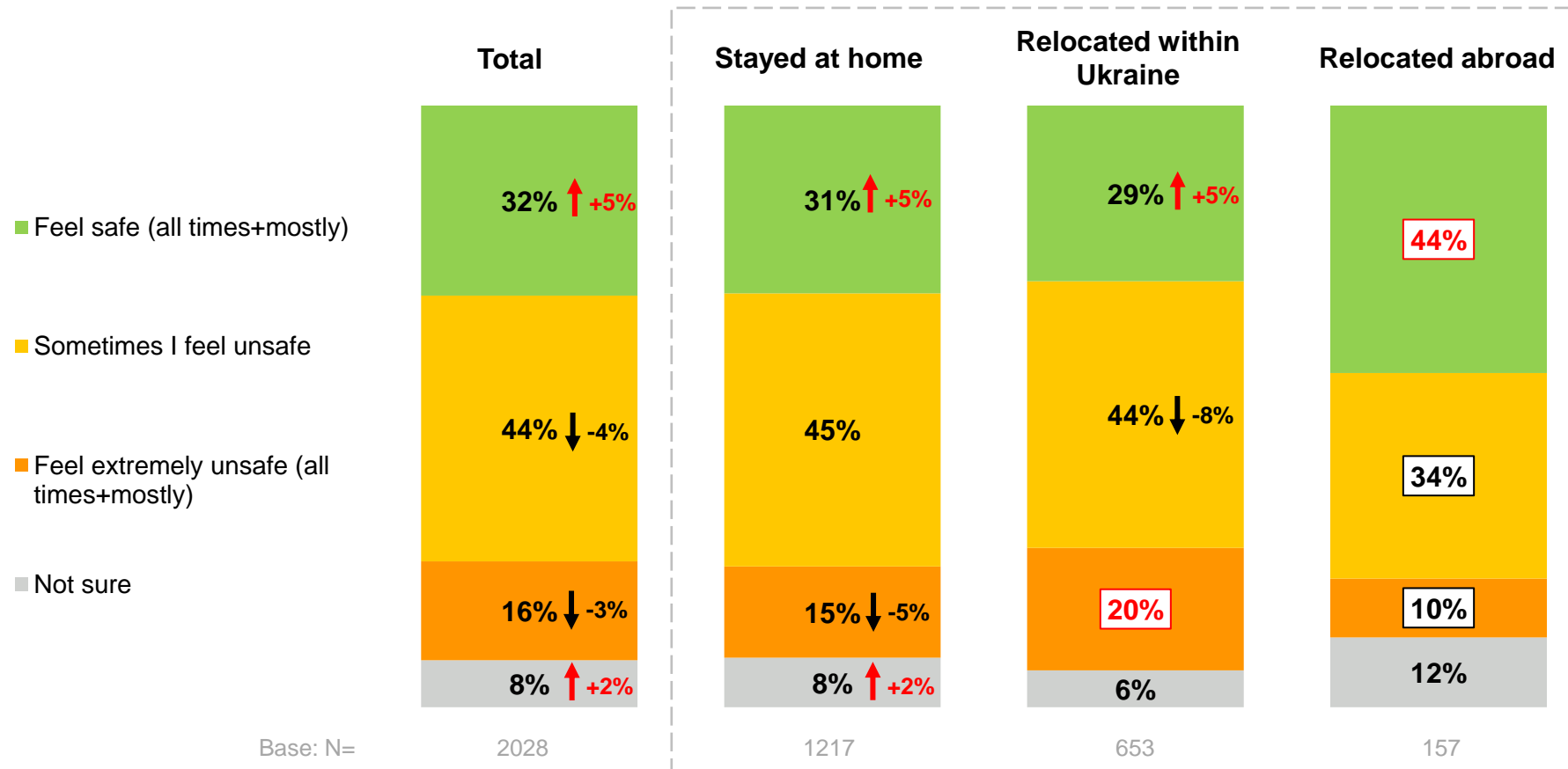
Compared to the eighth wave, the share of those who feel safe has increased (from 27% to 32%) due to a decrease in those who only occasionally feel unsafe (from 48% to 44%), and those who do not feel safe at all (from 19% to 16%).



PERCEIVED SAFETY

by migration status


Among those who are in Ukraine (both IDPs* and local residents), the share of those who feel safe has increased significantly, and among external migrants, this share is stable. Among IDPs, this occurred due to the fact that people began to feel unsafe less often. And among the locals (those who stayed at home), the increase in the feeling of safety was at the expense of a decrease in the share of people who feel unsafe all the time / most of the time.




*IDPs - internally displaced persons

Base: all respondents

Which of the following statements best describes your current state?

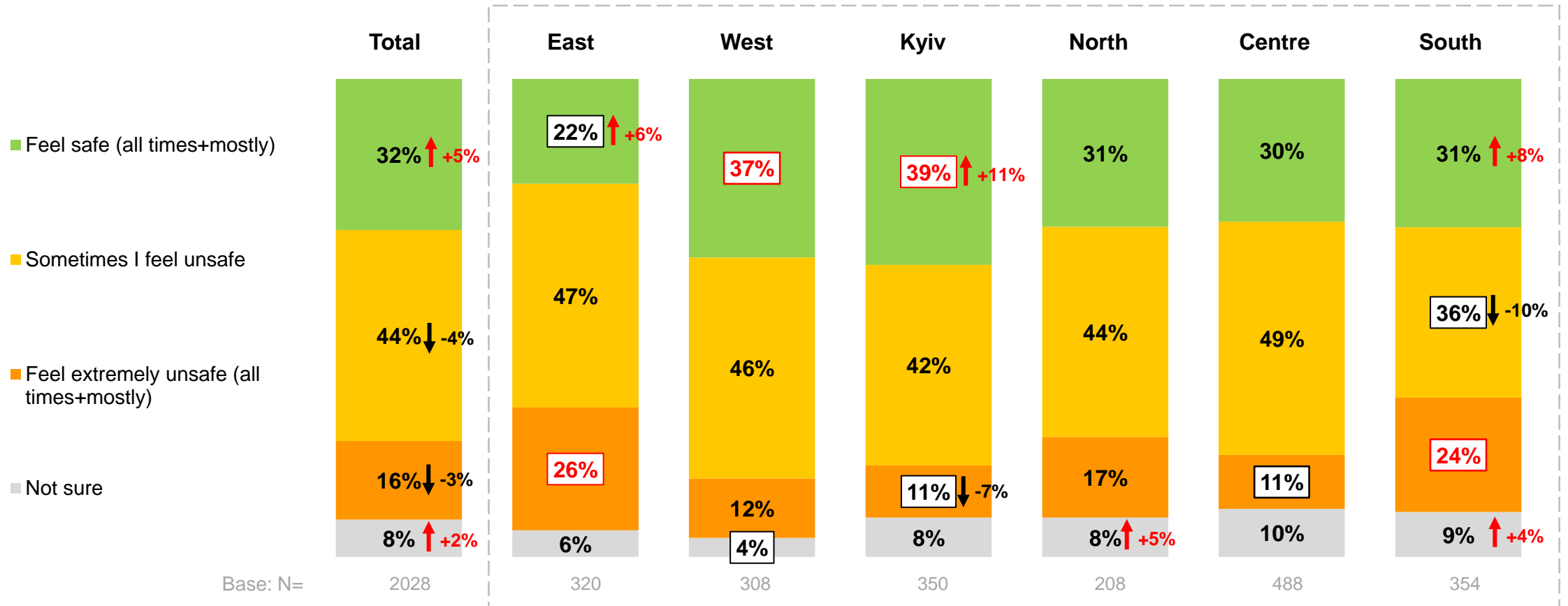
 Numbers that are statistically significantly **higher** / **lower** for the group, compared to the sample as a whole

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

PERCEIVED SAFETY


by region


The increase in the feeling of safety took place in such regions as the East (+6 p.p., although this indicator is one of the lowest here), Kyiv (+11 p.p., due to the decrease of those who constantly / predominantly feel unsafe) and the South (+ 8 p.p., at the expense of those who sometimes feel unsafe). At the same time, residents of Kyiv and the West still feel safe the most among all 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

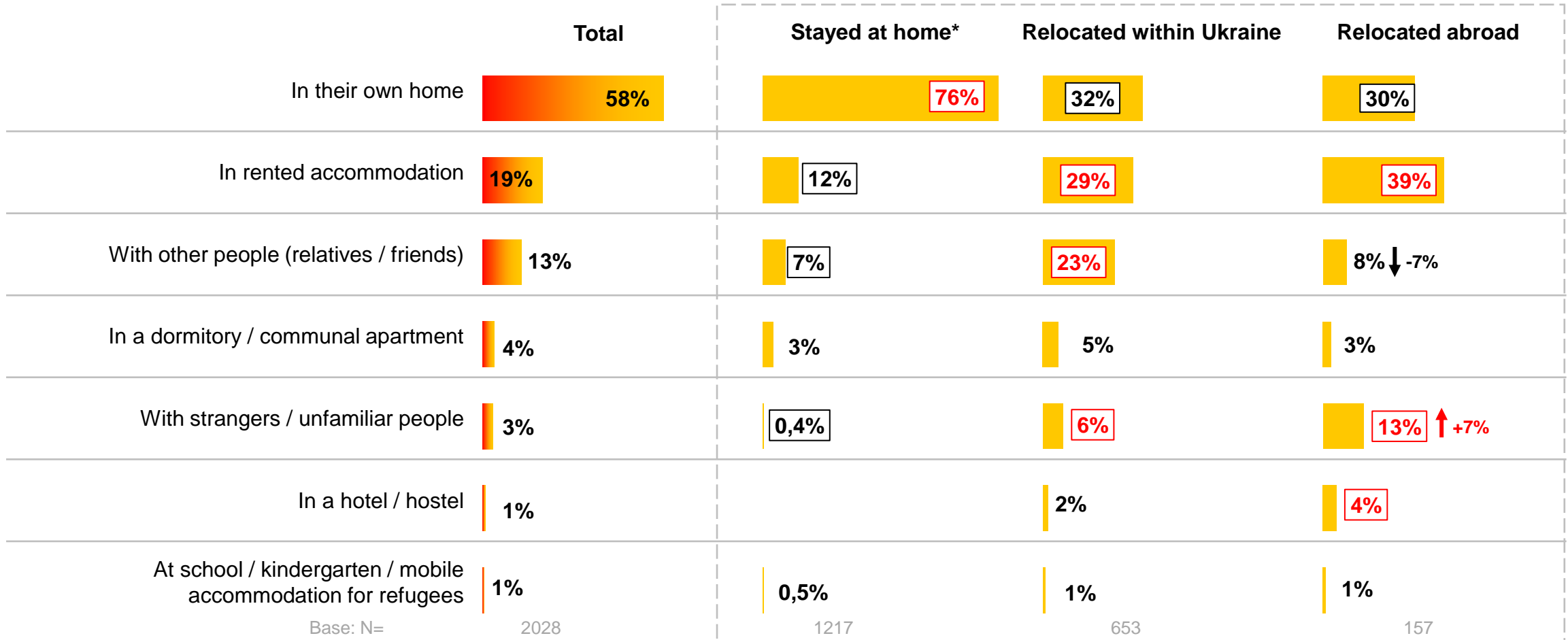
Indicators of the current place of residence remained unchanged compared to the previous wave. 58% of respondents continue to live in their own apartment. Also common places of residence are rented housing (19%) and housing of relatives / acquaintances (13%).

	I wave (20-22.05) N=2083	VII wave (12-15.08) N=2005	VIII wave (25-28.08) N=2060	IX wave (09-11.09) N=2028
In their own home	59%	58%	58%	58%
In rented accommodation	16%	18%	19%	19%
With other people (relatives / friends)	13%	14%	14%	13%
With strangers / unfamiliar people	4%	3%↓	3%	3%
In a dormitory / communal apartment	4%	3%	3%	4%
In a hotel / hostel	2%	2%	1%	1%
At school / kindergarten / mobile accommodation for refugees	2%	1%	1%	1%

CURRENT RESIDENCE

by migration status

Compared to the previous wave, the share of external migrants who live with relatives decreased (-7 percentage points), and the share of those who live with strangers or unfamiliar people increased (+7 percentage points).



*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 housing remains among residents of the East, while among them there are significantly more people who rent housing, live in a dormitory / communal apartment or with unfamiliar people.

	Total	East	West	Kyiv	North	Centre	South
In their own home	58%	28%	69%	61%	64%	68%	56%
In rented accommodation	19%	33%	15%	15%	18%	17%	18%
With other people (relatives / friends)	13%	16%	10%	12%	9%	11%	16%
In a dormitory / communal apartment	4%	6%	2%	6%	4%	3%	3%
With strangers / unfamiliar people	3%	9%	3%	3%	1%	1% ↓ -2%	4% ↑ +3%
In a hotel / hostel	1%	3%	0,4%	0,5%	1%	↓ -1%	1% ↓ -2%
At school / kindergarten / mobile accommodation for refugees	1%	1% ↓ -2%	0,4%	0,3%	3%		0,2%
Base: N=	2028	320	308	350	208	488	354

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

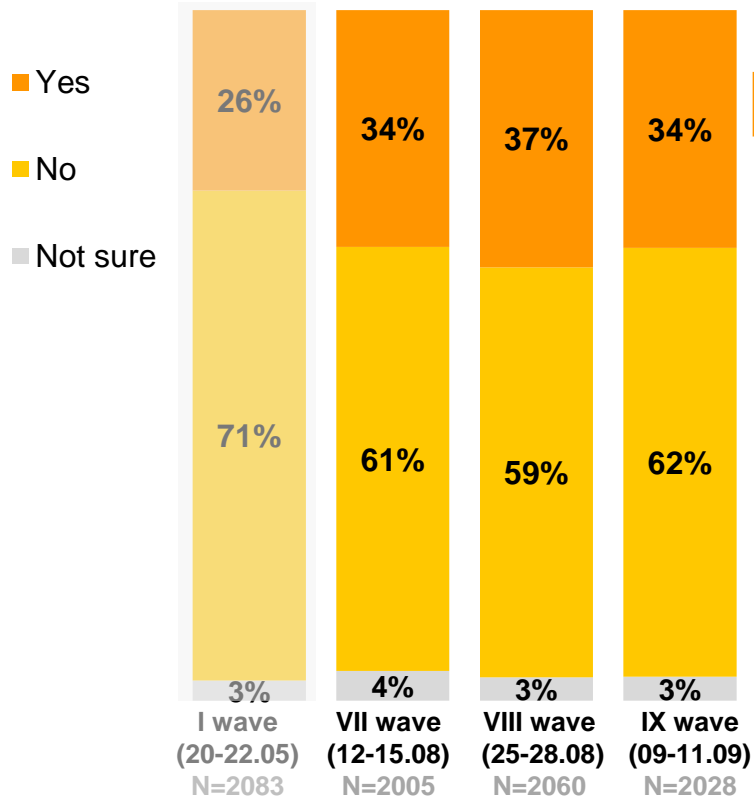


Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

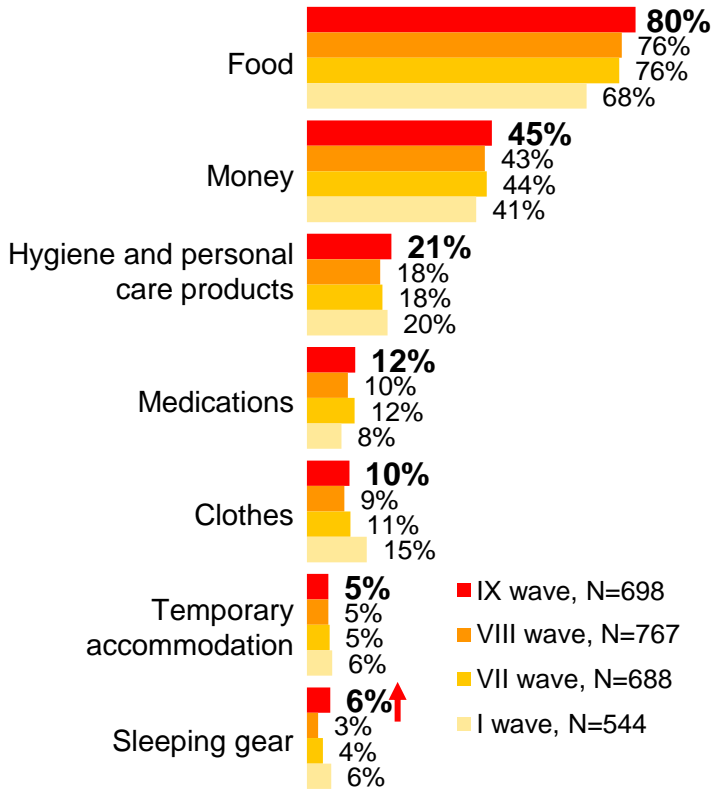
HUMANITARIAN AID FROM THE **UKRAINIAN** GOVERNMENT

The percentage of respondents who receive humanitarian aid from the Ukrainian state remains stable (at the level of 34%). The most popular form of aid is food (80%) and money (45%). 47% of recipients assess the received assistance as sufficient.

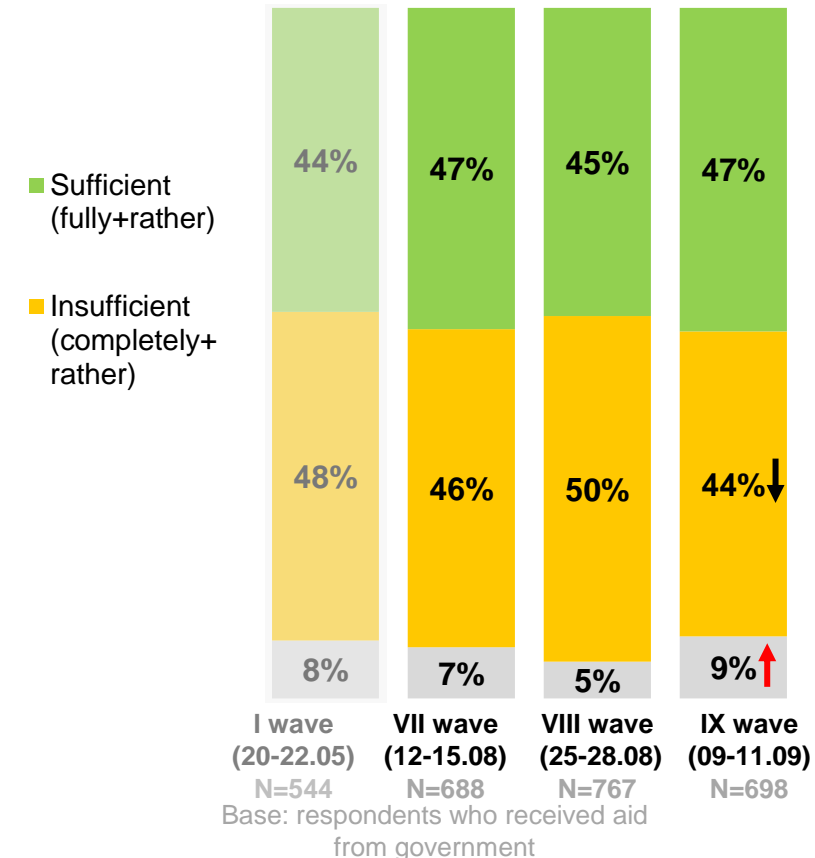
Reception of humanitarian aid from the government



Type of humanitarian aid



Sufficiency of the humanitarian aid



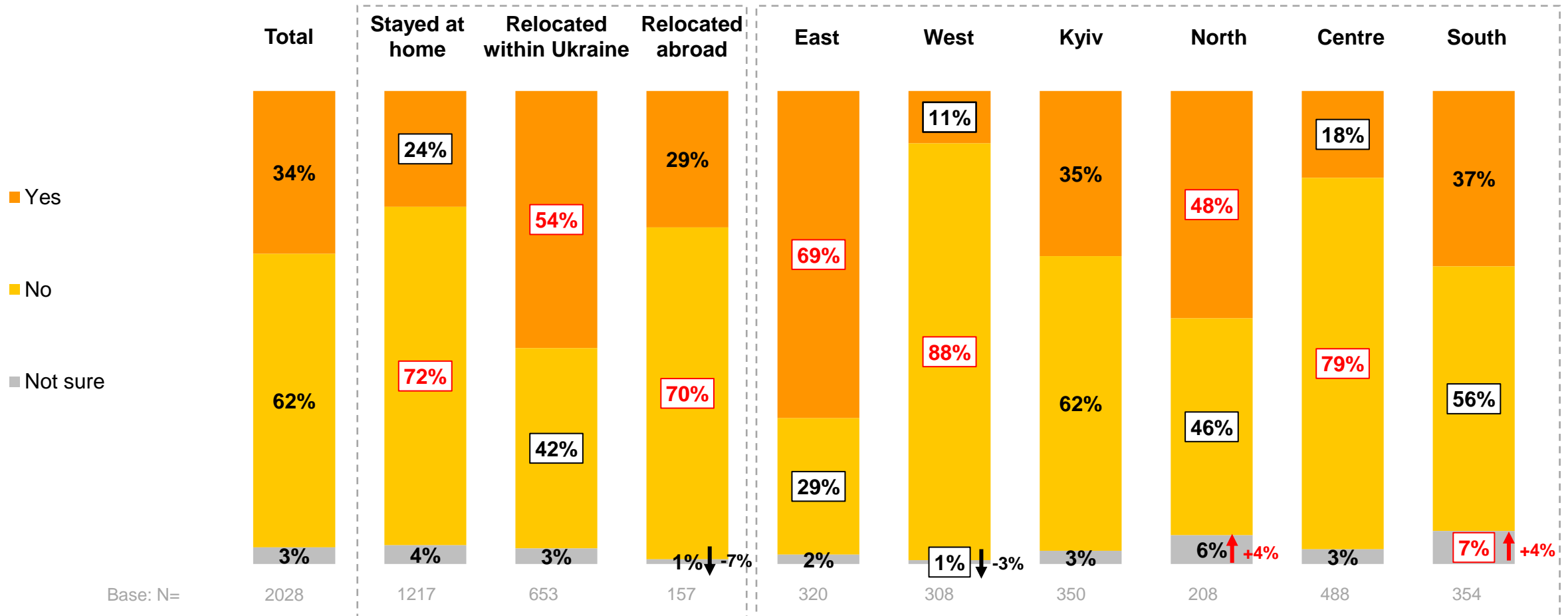
Have you or your family received humanitarian aid from the Ukrainian government?
What kind of humanitarian aid did you or your family receive from the Ukrainian government?
How would you assess the humanitarian aid provided to you or your family by the Ukrainian government?

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. Mainly, humanitarian aid from the Ukrainian state is received by IDPs from the Eastern and Northern regions. The smallest number of recipients are among the group of external migrants, those who stayed at home, and among residents of the Western and Central regions.



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

by migration status and region

Compared to the previous wave, among residents of the East, there was a decrease in the share of people who received financial assistance from the Ukrainian state, but assistance in the form of temporary housing and sleeping gear increased. In the Centre, there was more aid in the form of food and hygiene products, while in the South - in the form of money.

	Total	Stayed at home	Relocated within Ukraine	Relocated abroad	East	West	Kyiv	North	Centre	South
Food	80%	83%	79%	71%	85%	51%	74%	88%	76% ^{↑+15%}	80%
Money	45%	37%	51%	52%	47% ^{↓-9%}	45%	45%	29%	36%	59% ^{↑+21%}
Hygiene and personal care products	21%	16%	23%	26%	24%	32%	23%	18%	17% ^{↑+10%}	14%
Medications	12%	6%	15%	24%	12%	9%	7%	23%	10%	9%
Clothes	10%	3%	15%	18%	10%	18%	16%	15%	0%	7%
Sleeping gear (bedding, pillows, mattresses, sleeping bags etc.)	6% ^{↑+3%}	3% ^{↑+3%}	7%	12%	8% ^{↑+5%}	6%	5%	2%	8% ^{↑+7%}	3%
Temporary accommodation	5%	0,2%	8%	20%	12% ^{↑+8%}	9%	3%	1%	2%	1%
Base: N=	698	298	355	45	221	34	122	100	90	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?

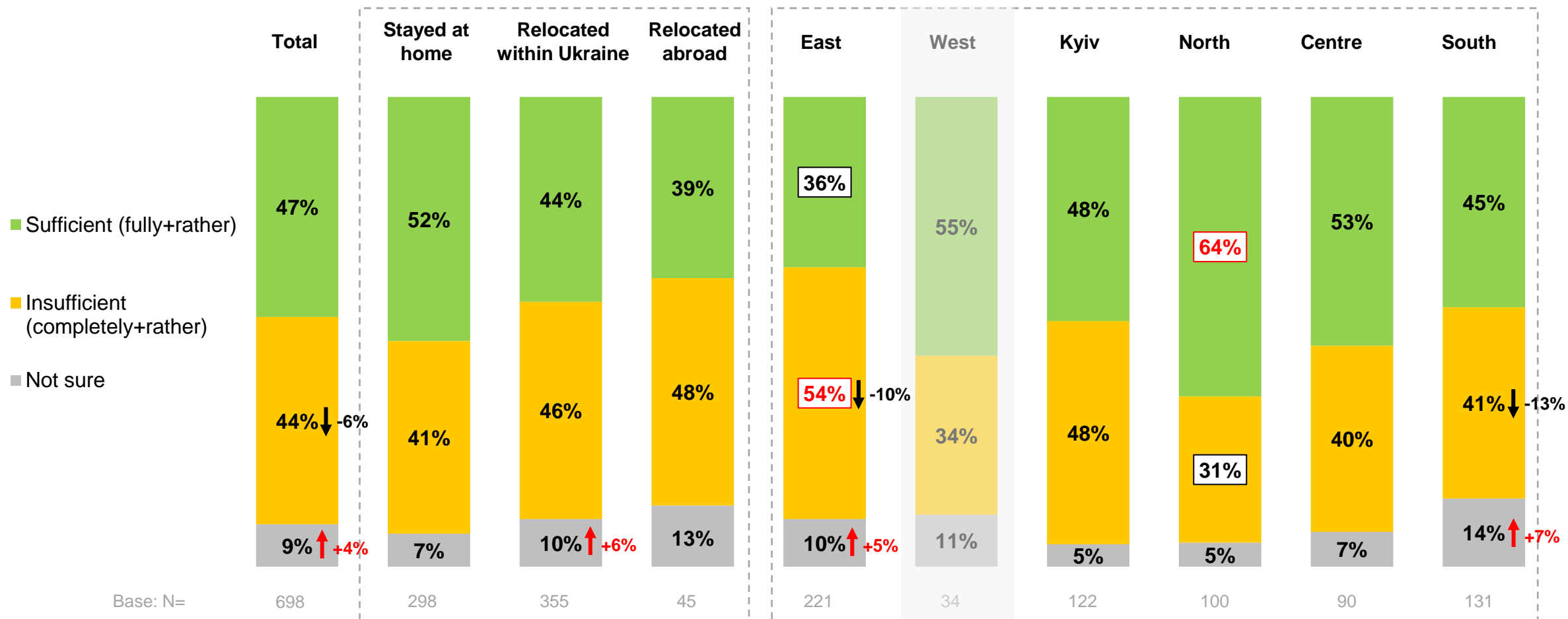
[↑] Numbers that are statistically significantly higher / [↓] lower, compared to the previous wave of the study

[□] 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

In the East, there is significantly higher share of people who receive humanitarian aid and consider it as insufficient, but this share is decreasing compared to the previous wave (by -10 p.p.). Most satisfied with the assistance - in the North. While in the South, the share of those who consider aid from the state as insufficient is decreasing (-13 p.p.).



* Insufficient base for analysis (observation of trend)

Base: respondents who received aid from government

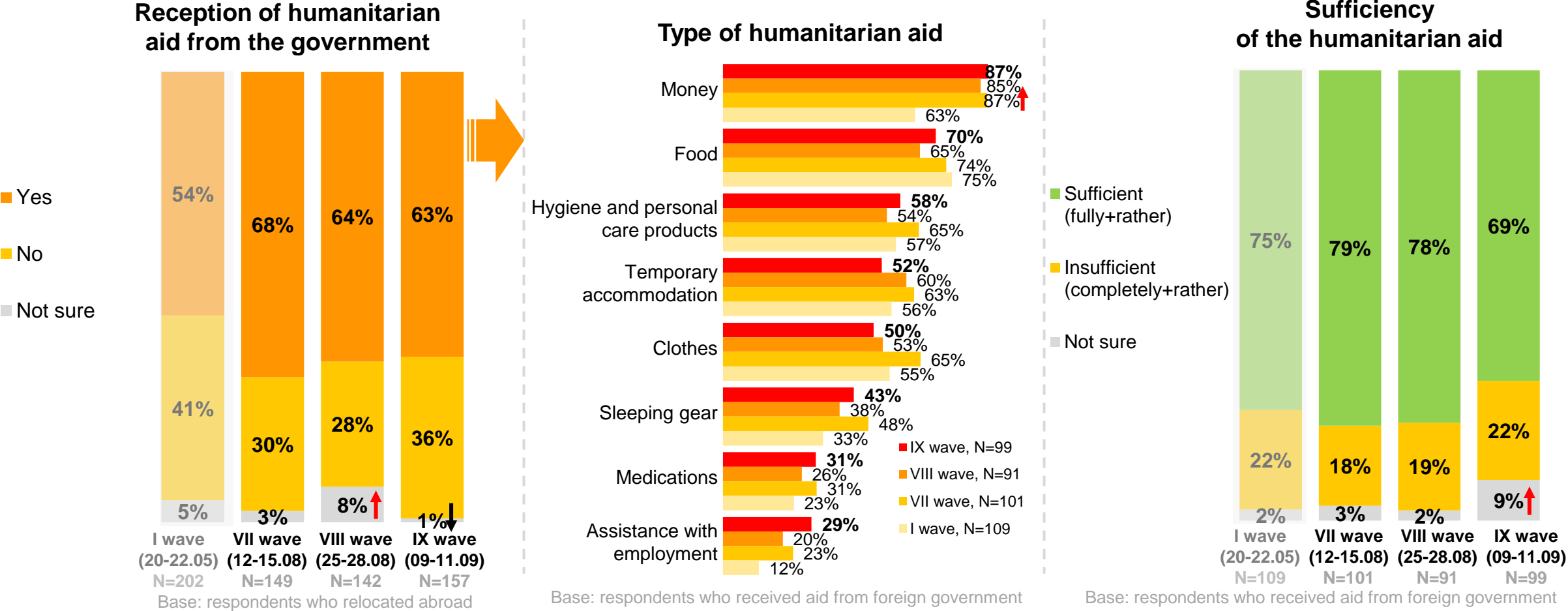
How would you assess the humanitarian aid provided to you or your family by the Ukrainian government?

↓ ↑ 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 living remained unchanged and is at 63%. Among those who received it, 69% evaluated it as sufficient. The most common forms of assistance are money (87%), food (70%), hygiene products (58%), temporary housing (52%) and clothes (50%).



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

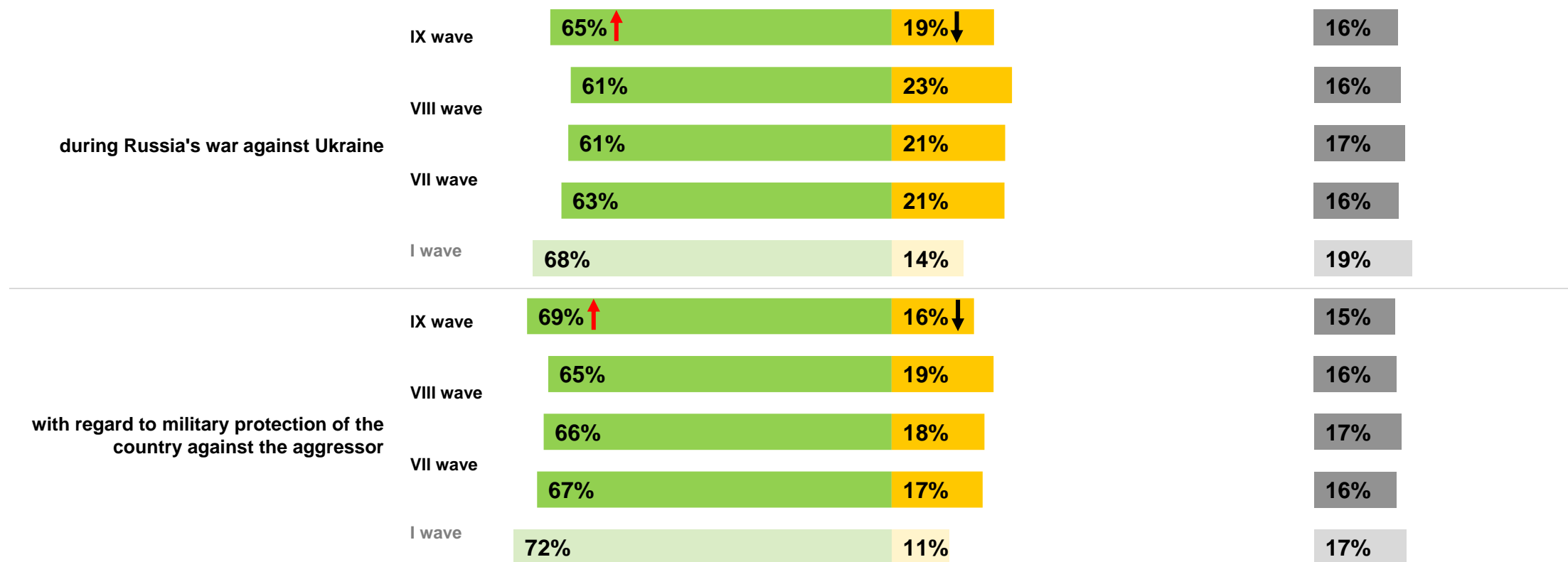


EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES...

In the ninth wave, there were significant changes in the evaluation of the effectiveness of the Ukrainian authorities' actions both since the beginning of the war in general and in the field of military protection: the share of respondents who consider these actions effective has increased (to 65% and 69%, respectively), and the share of those who consider these actions ineffective has decreased. In particular, people from the East began to evaluate the effectiveness of the government's actions more positively - their evaluations are now on the same level as the evaluations of the sample as a whole.



Effective (very + rather) Ineffective (very + rather)

Not sure



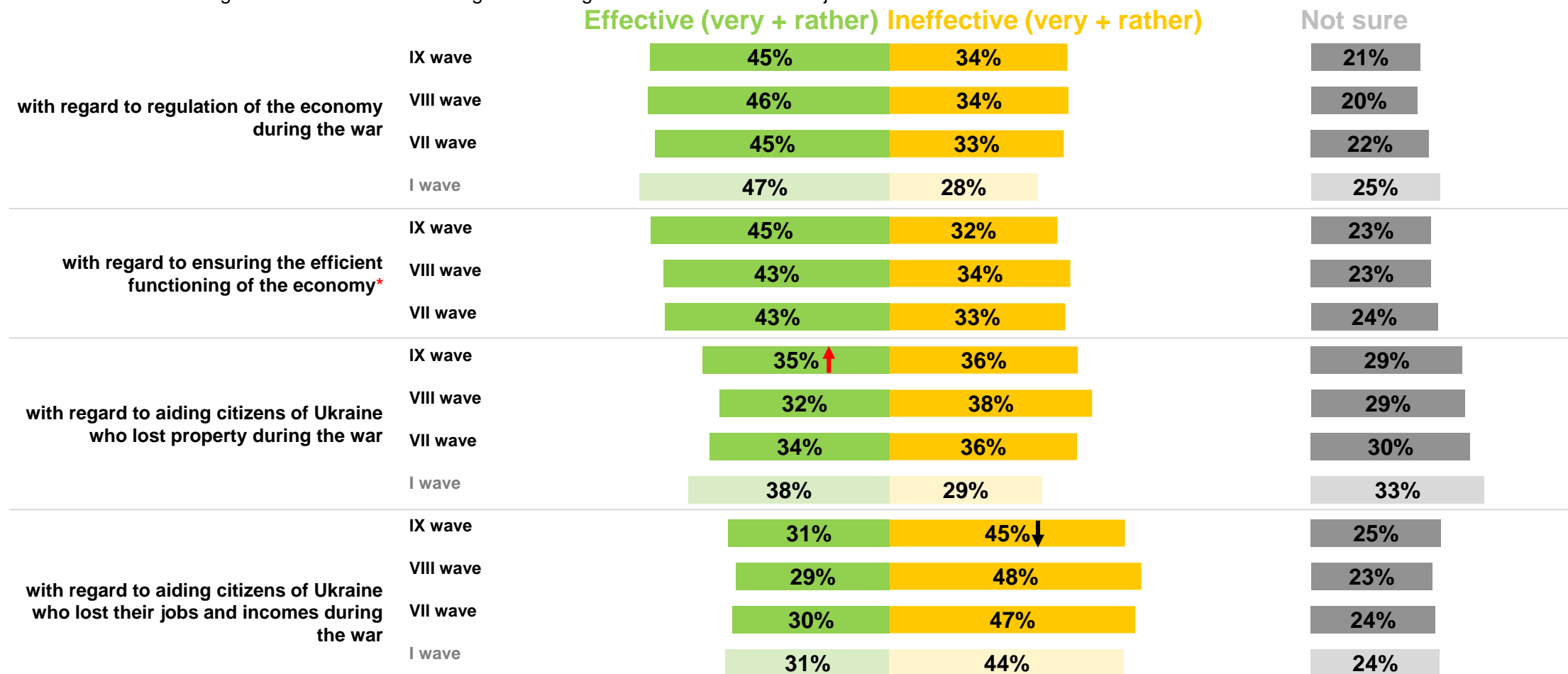
Base: all respondents; I wave – N = 2083, VII wave – N = 2005, VIII wave – N = 2060, IX wave – N = 2028.

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 evaluation of the actions of the Ukrainian authorities in the spheres of the economy has not changed significantly in the ninth wave: almost half (45%) of respondents consider such actions to be effective. At the same time, there was an increase in the share of respondents who consider the government's actions with regard to aiding those who lost their property to be effective; but there was a decrease in the share of those who consider the government's actions with regard to aiding those who have lost their jobs and income to be ineffective.



Base: all respondents; I wave – N = 2083, VII wave – N = 2005, VIII wave – N = 2060, IX wave – N = 2028.

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



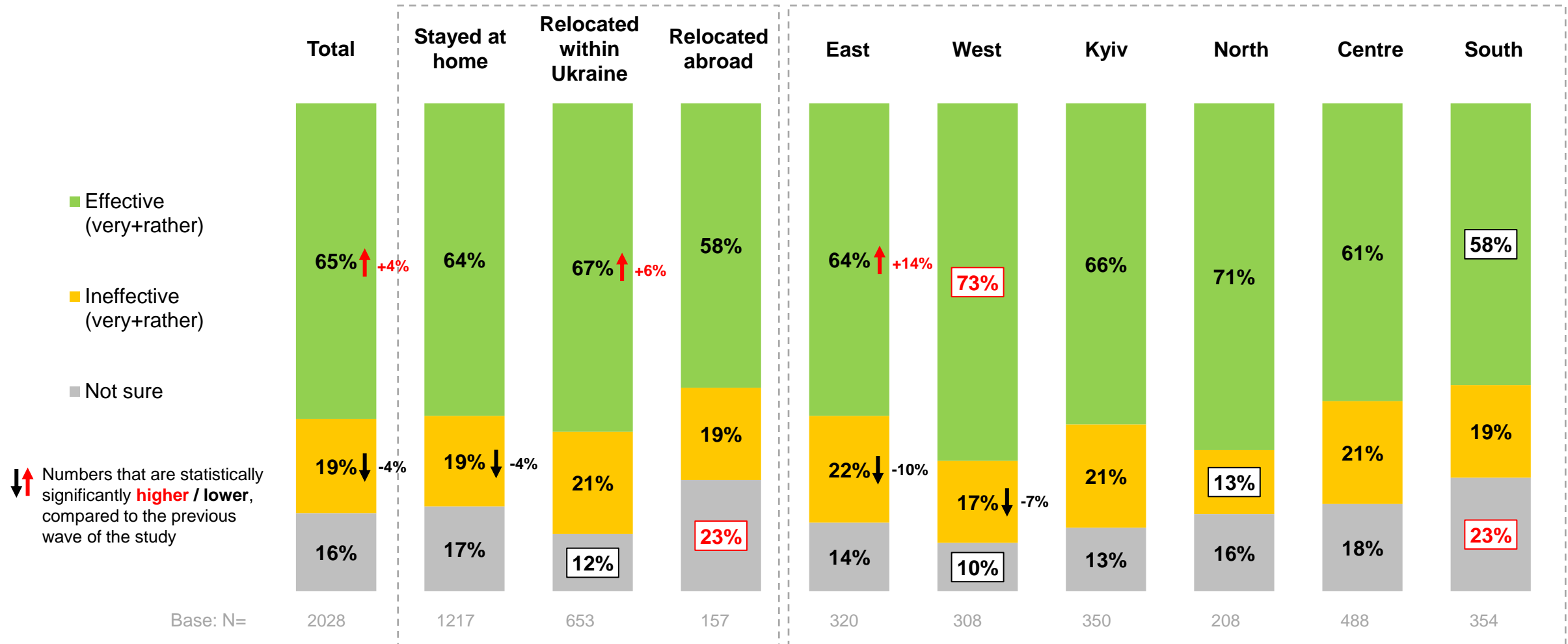
Centre for
Economic
Recovery



Advanter



MOVING FORWARD
TOGETHER



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



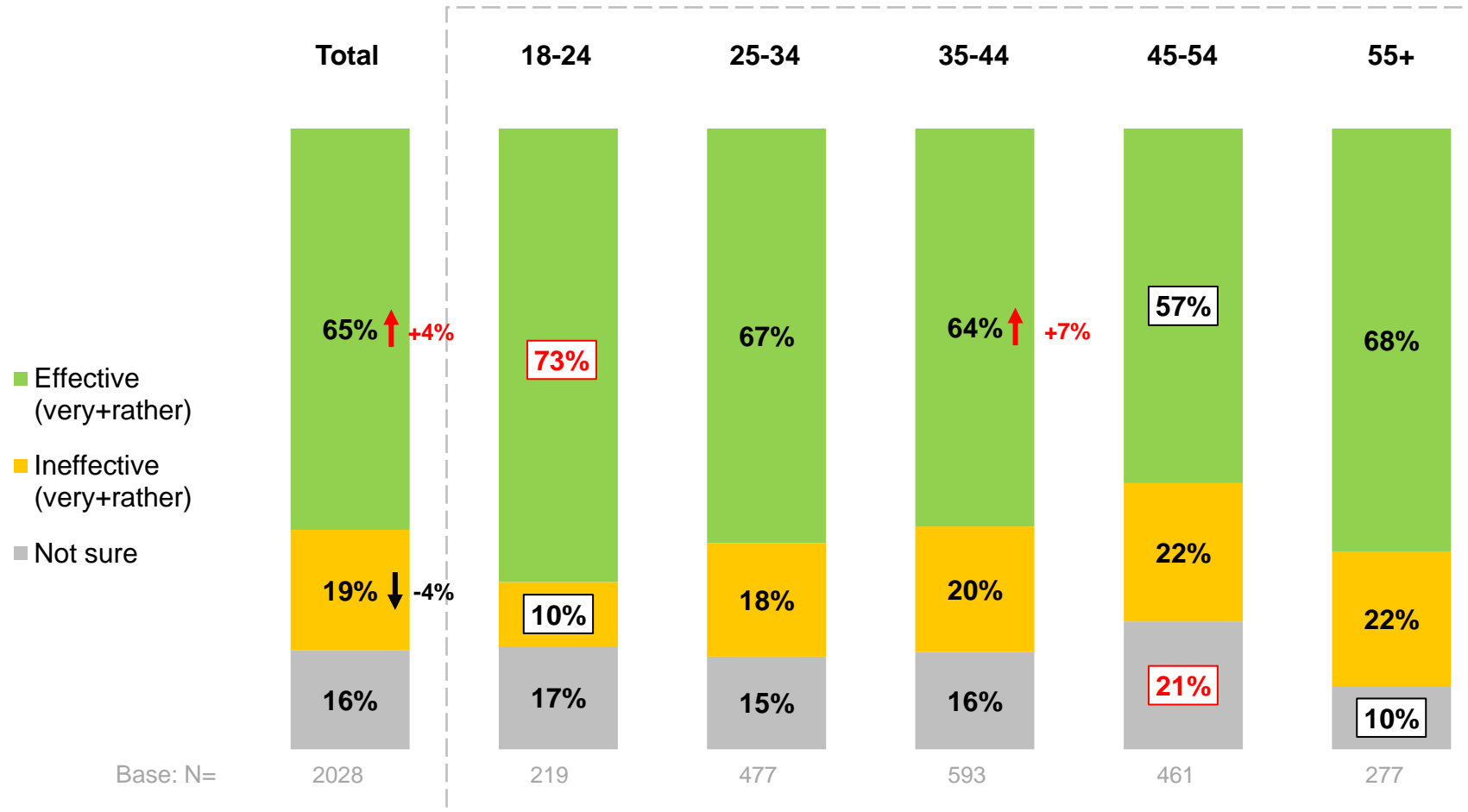
Centre for
Economic
Recovery



Advanter



MOVING FORWARD
TOGETHER



Base: N=

2028

219

477

593

461

277

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

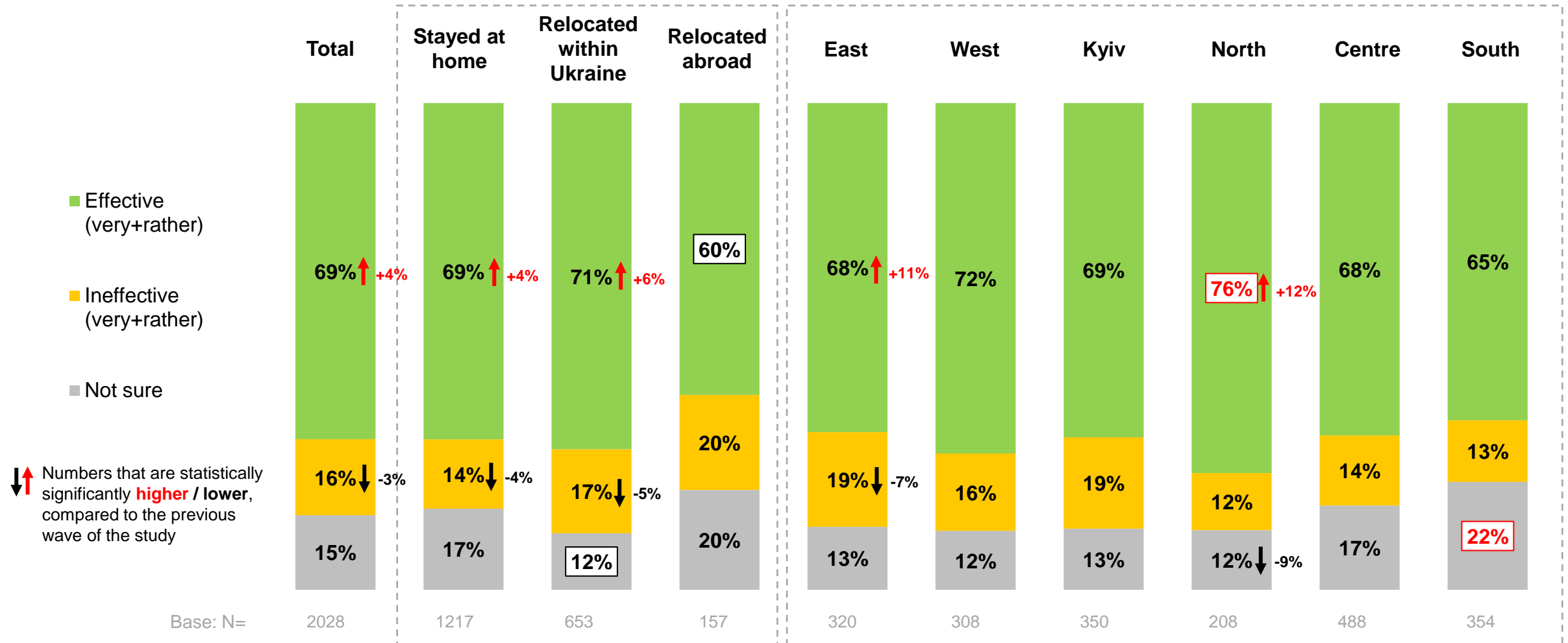
□ □ Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

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**



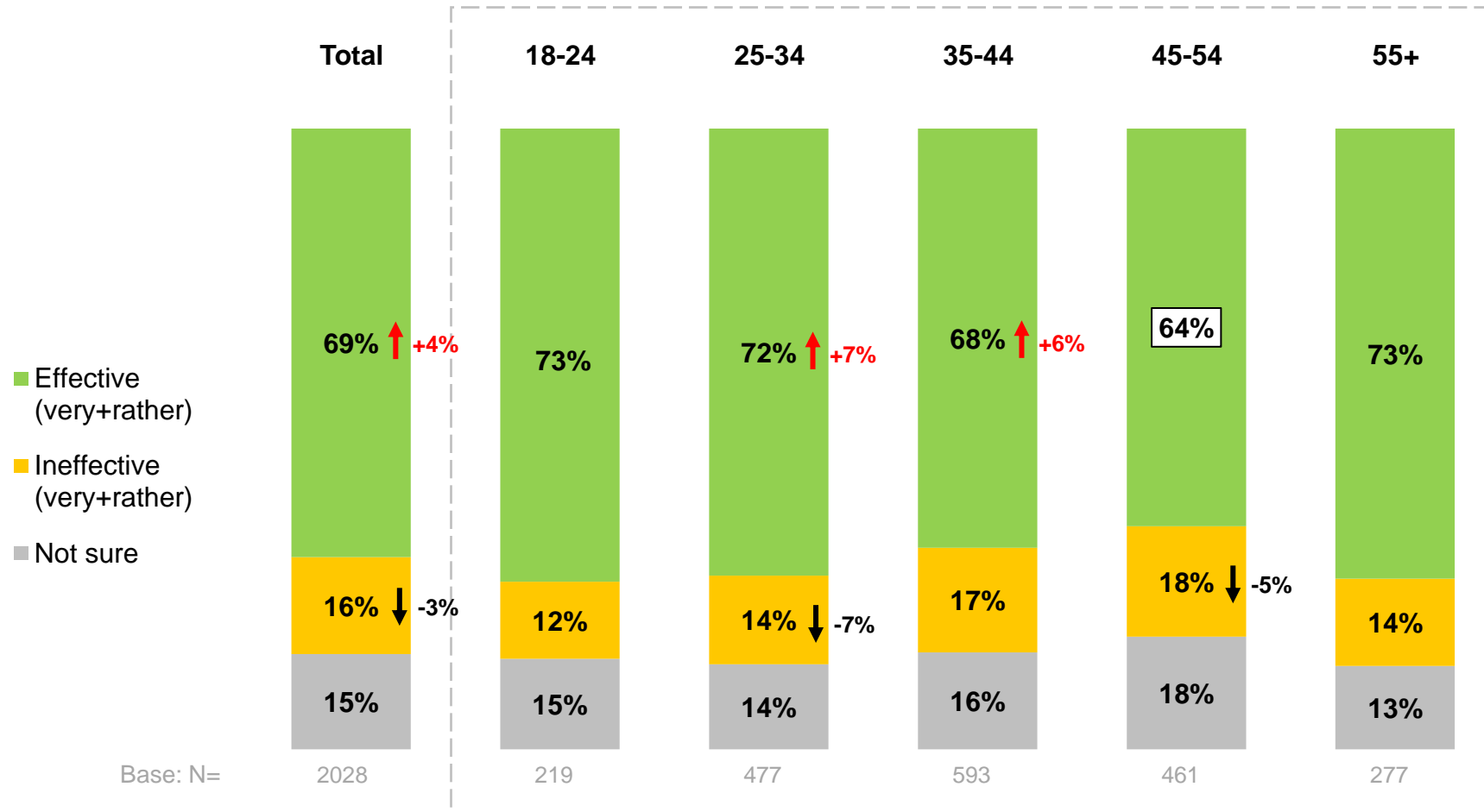
Base: all respondents

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



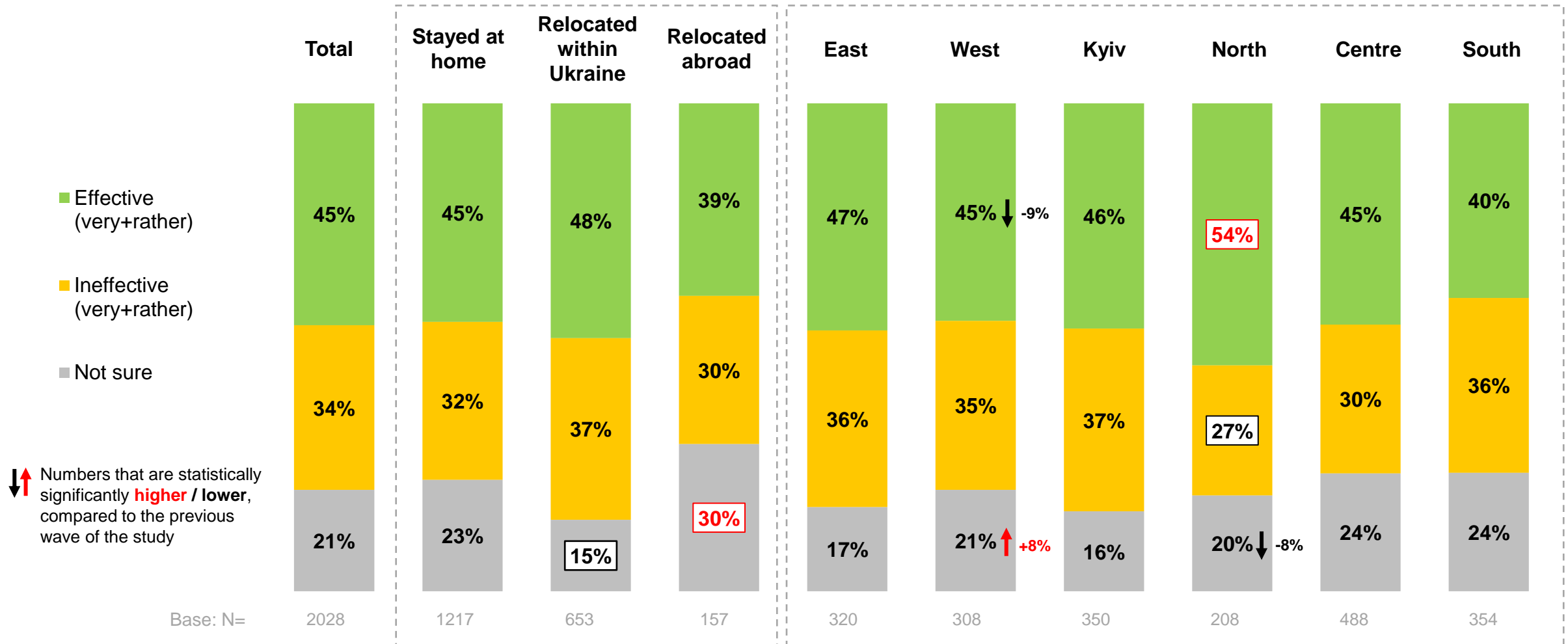
Centre for
Economic
Recovery



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** 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



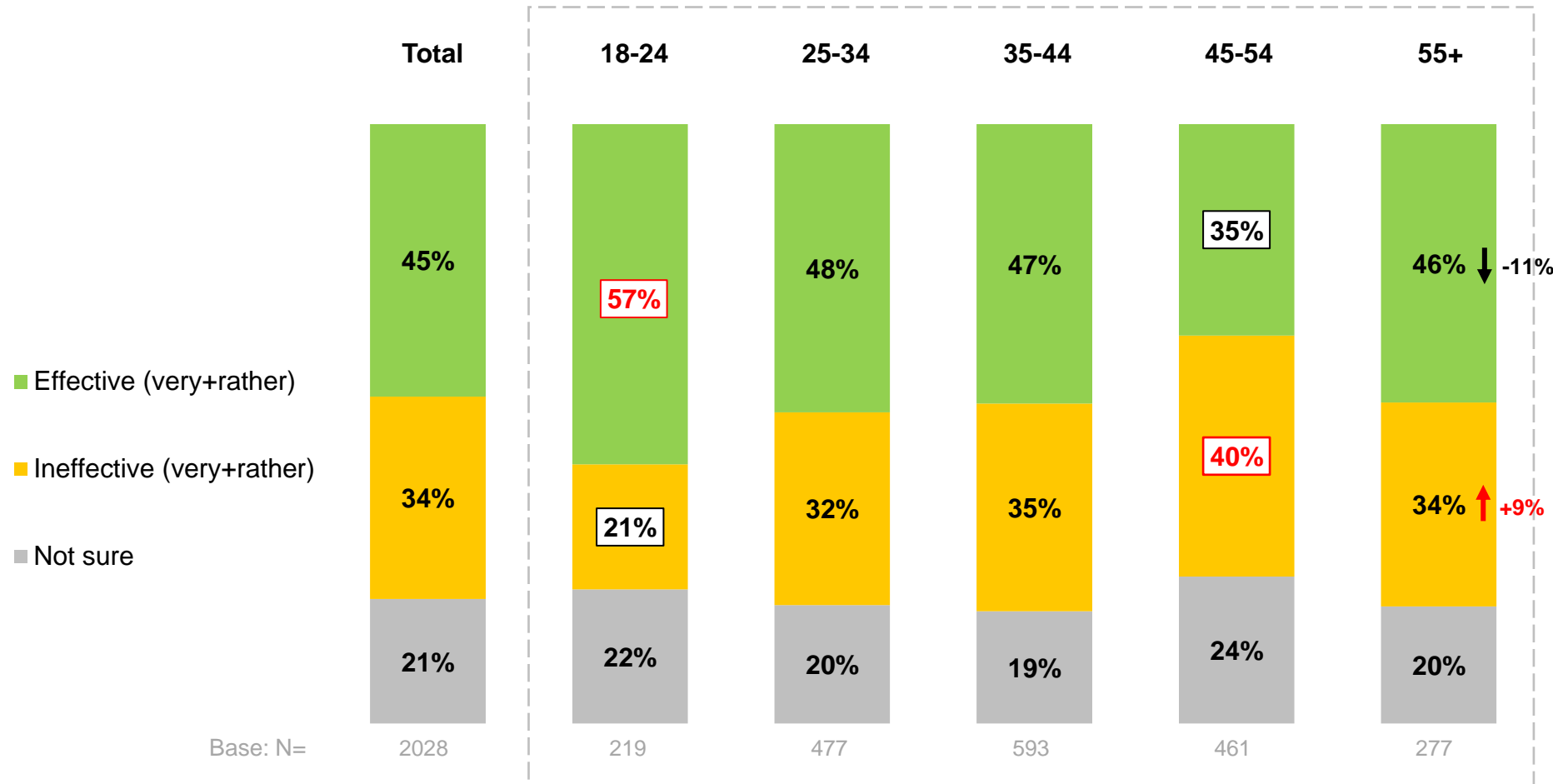
Centre for
Economic
Recovery



Advanter



MOVING FORWARD
TOGETHER



Base: all respondents

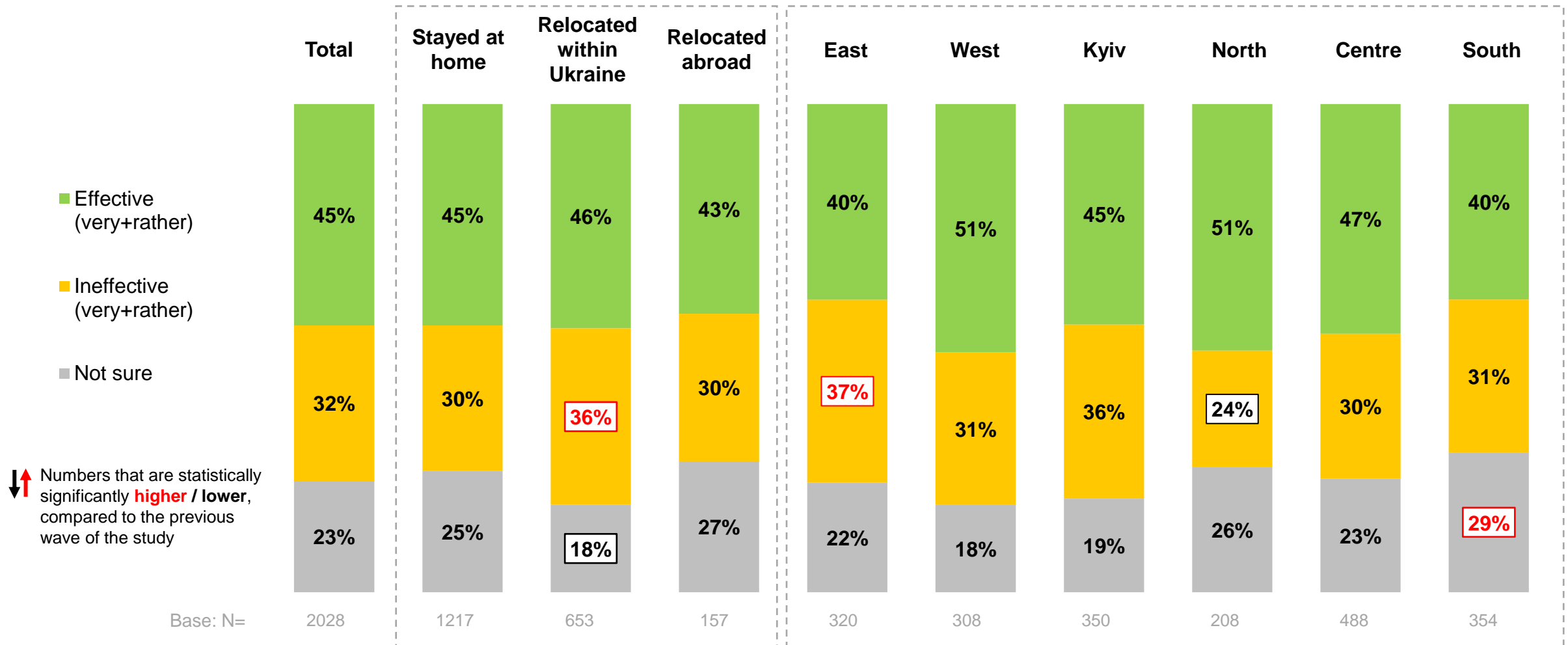
How effective do you consider the actions of the Ukrainian authorities with regard to regulation of the economy during the war?

↓ ↑ 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



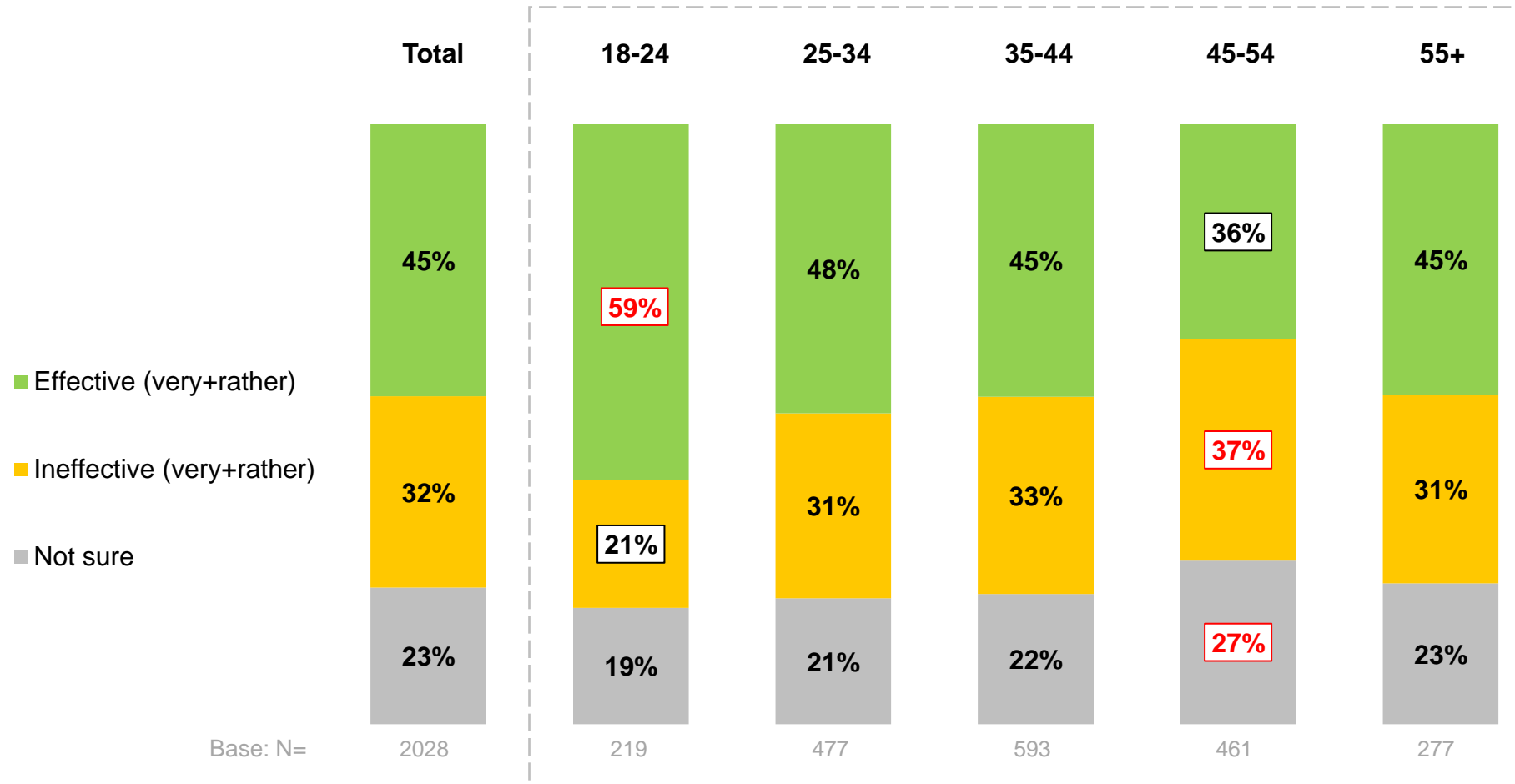
Centre for
Economic
Recovery



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?

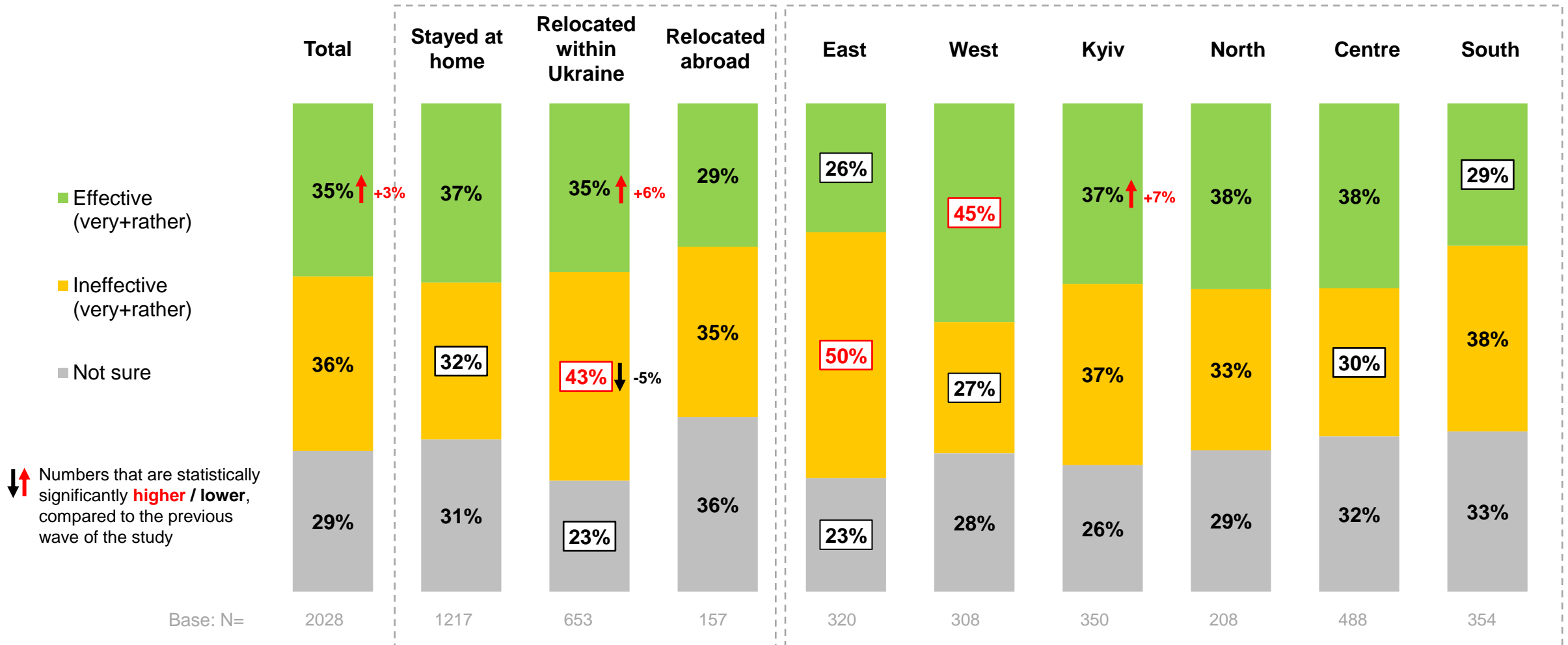
↑ ↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

□ 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**



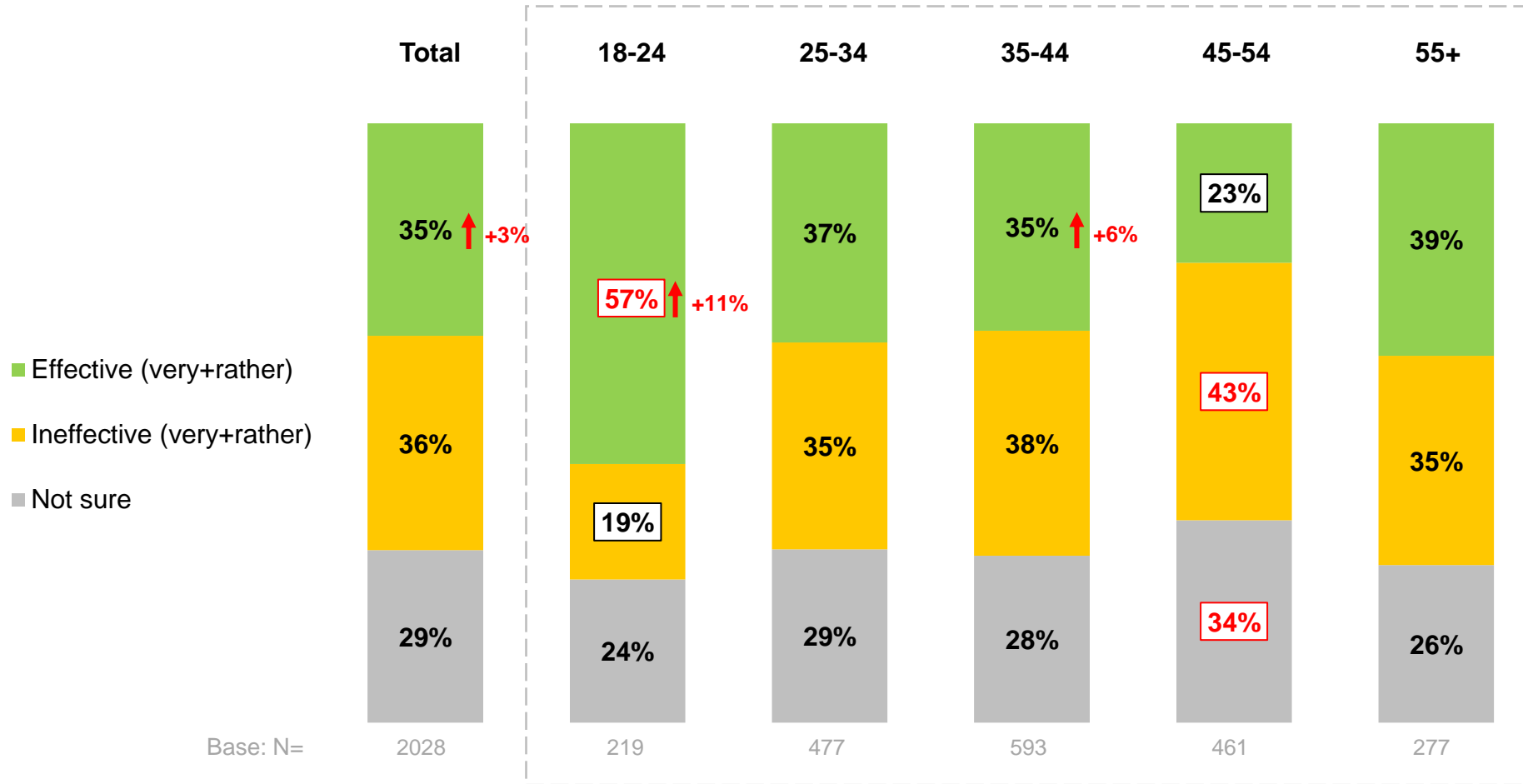
Base: all respondents

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?

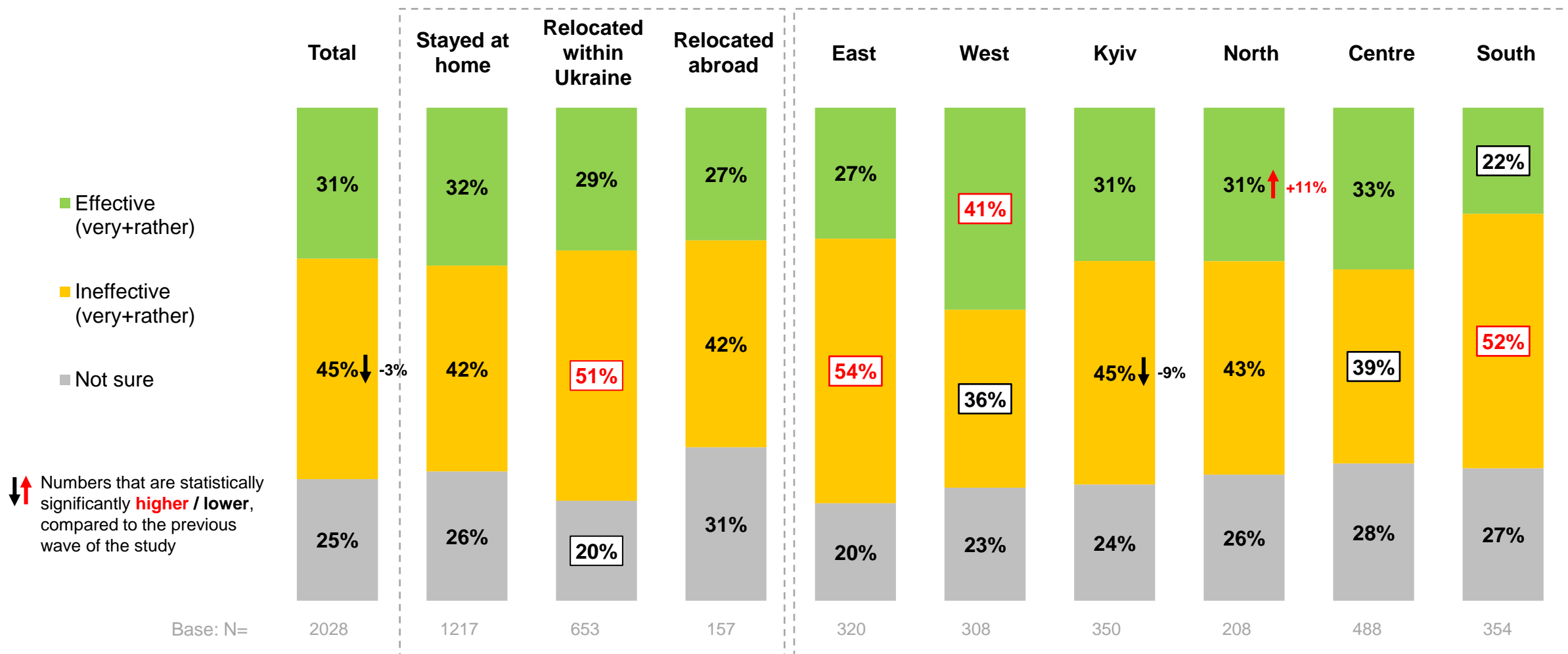
↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

□ 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

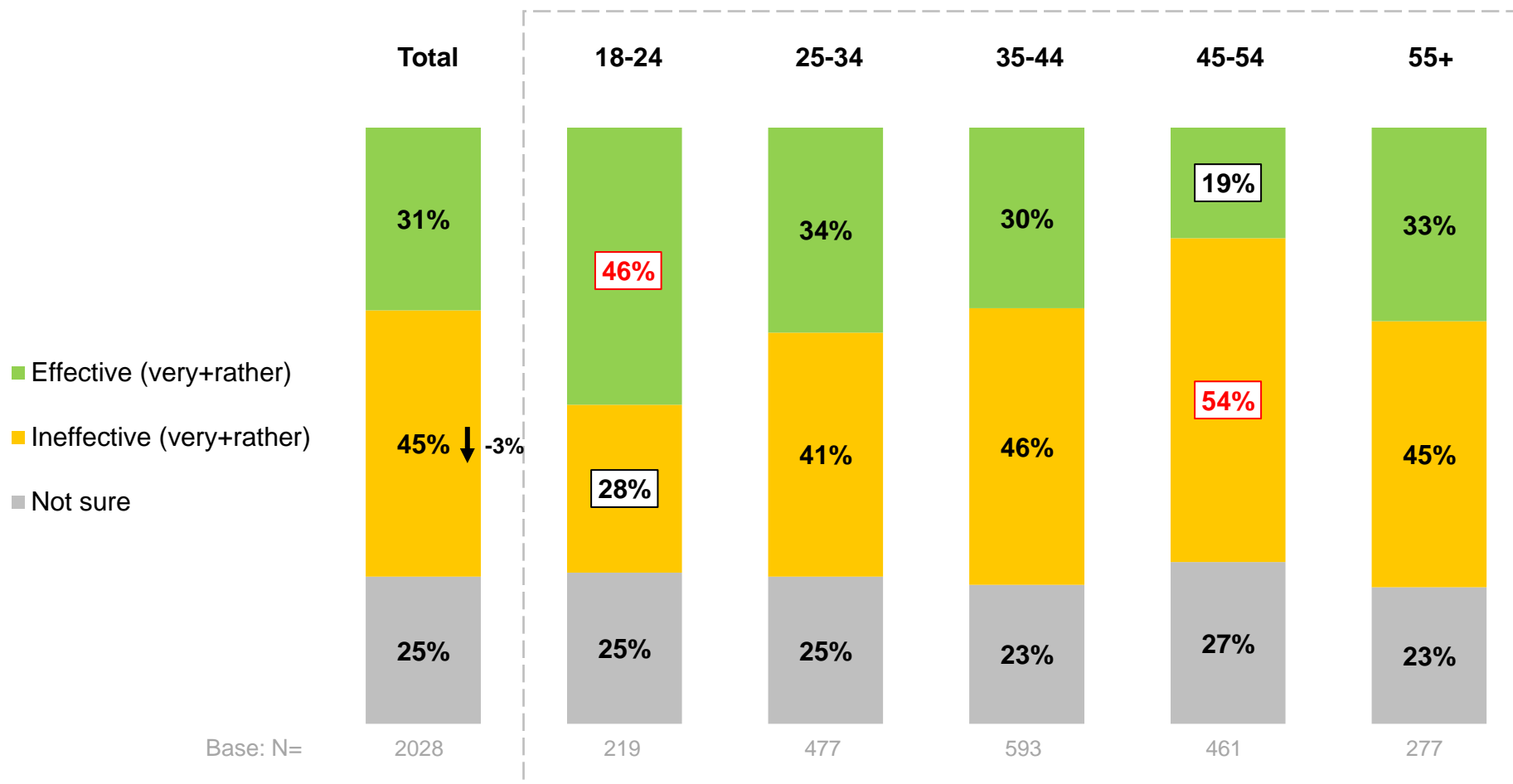
How effective do you consider the actions of the Ukrainian authorities with regard to aiding citizens of Ukraine who lost their job and income during the war?

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

Respondents continue to express the highest percentage of trust in the Armed Forces of Ukraine (62%), the President of Ukraine (44%) and volunteer organizations (28%). Compared to the previous wave, there was an increase in the level of trust in international organizations and mass media.

	I wave (20-22.05) N=2083	VII wave (12-15.08) N=2005	VIII wave (25-28.08) N=2060	IX wave (9-11.09) N=2028
Armed Forces of Ukraine	 62%	 62%	 61%	 62%
President of Ukraine	 49%	 44%	 44%	 44%
Volunteer organizations	 35%	 30%	 31%	 28%
International organizations*		 12%	 11%	 15%↑
Charitable organizations	 15%	 16%	 16%	 14%
Doctors	 15%	 17%	 16%	 14%
National Police of Ukraine	 16%	 12%	 10%↓	 11%
Church	 10%	 9%	 10%	 10%
Government of Ukraine	 13%	 9%	 8%	 9%
Media*		 5%	 5%	 7%↑
Verkhovna Rada of Ukraine	 7%	 4%	 4%	 5%
National Bank of Ukraine	 7%	 3%	 4%	 4%
State Customs Service of Ukraine	 3%	 2%	 1%	 2%
Ministry of Finance of Ukraine	 4%	 2%	 2%	 2%
State Tax Service	 2%	 2%	 1%	 1%
Courts	 2%	 1%	 1%	 1%
None of the above	 7%	 8%	 9%	 8%

*were added in 7th wave of survey

Base: all respondents

Which of the following institutions do you trust?

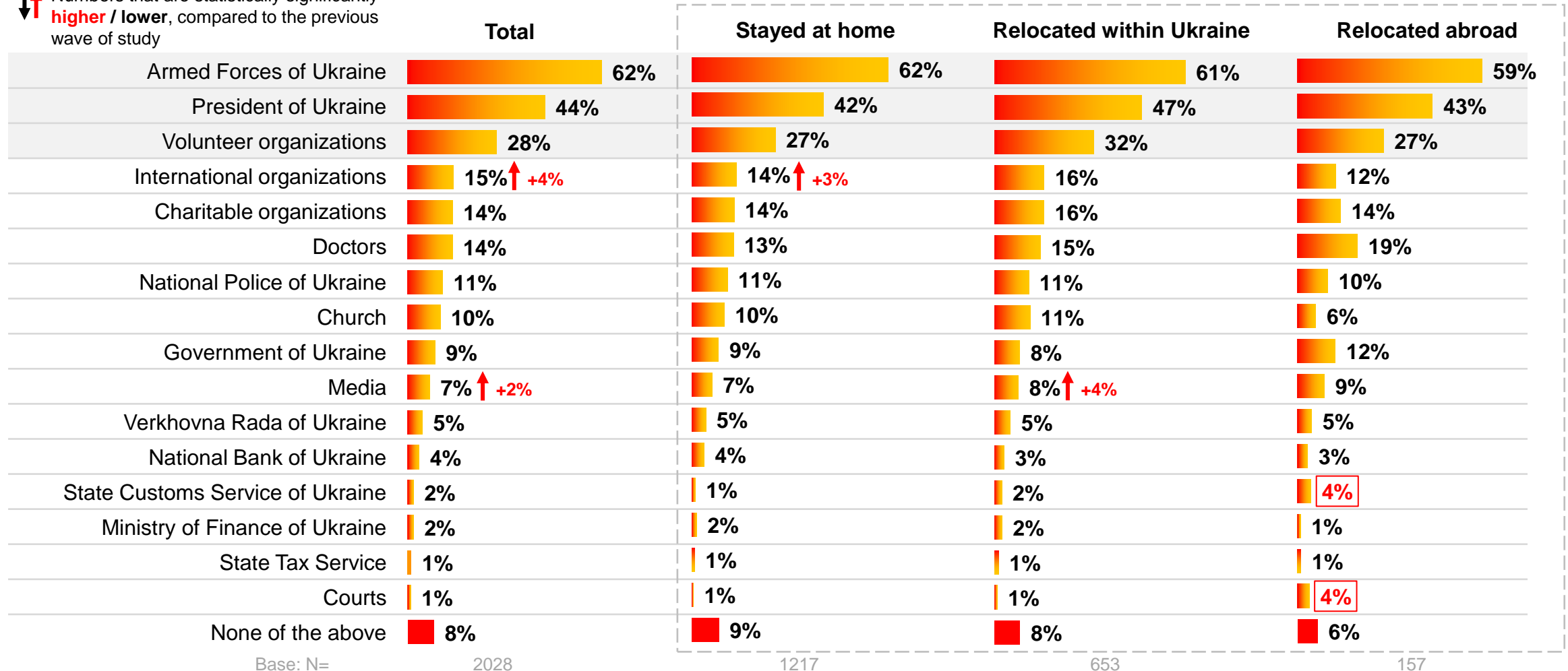
↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

TRUST IN INSTITUTIONS

by migration status

The only significant differences depending on migration status are a slightly higher level of emigrants' trust in the courts and the State Customs Service. In the ninth wave, the level of trust in the mass media among IDPs and trust in international organizations among those who remained at home also increased.

↓↑ 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?

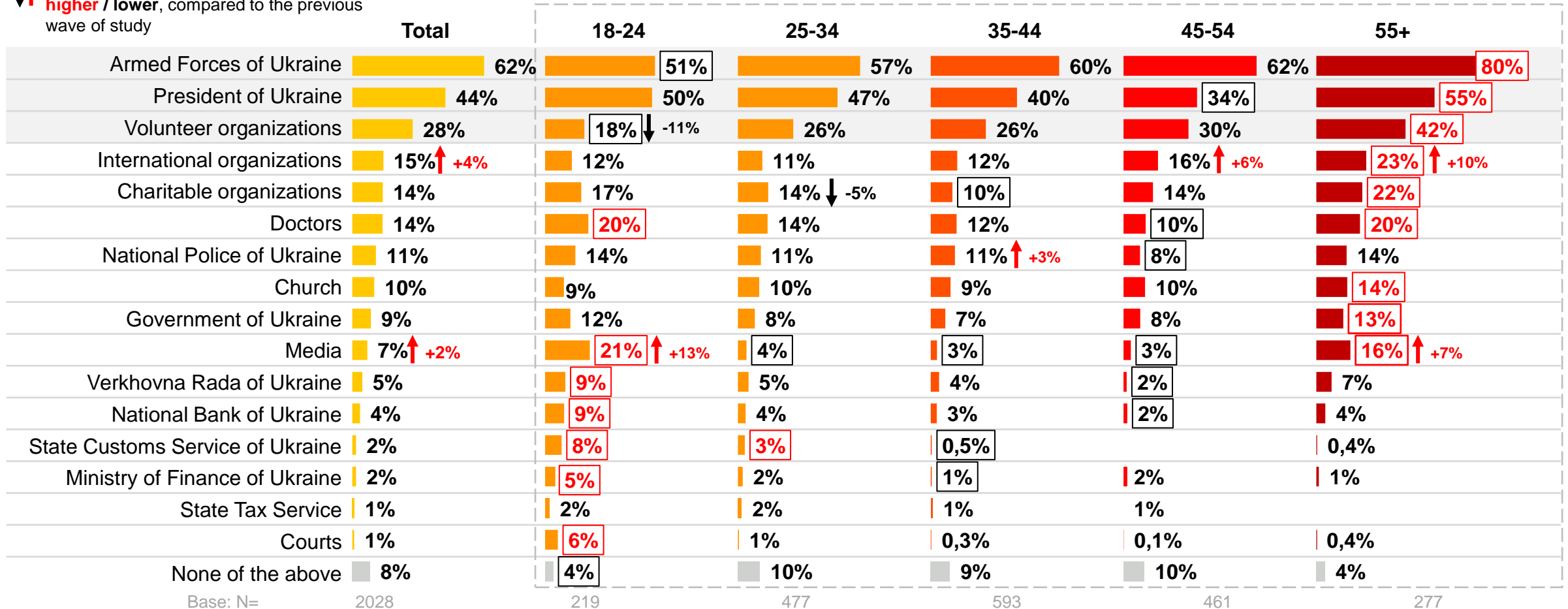
Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

TRUST IN INSTITUTIONS

by age

Respondents aged 18-24 and 55+ trust a large number of institutions significantly more than other age groups; at the same time, young people trust the Armed Forces of Ukraine and volunteers less than the sample in general (the level of trust in the latter groups has significantly decreased). There was a significant increase in the level of trust in international organizations among people aged 45+, in mass media among people aged 18-24 and 55+, and in the police among people aged 35-44.

↑ 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?

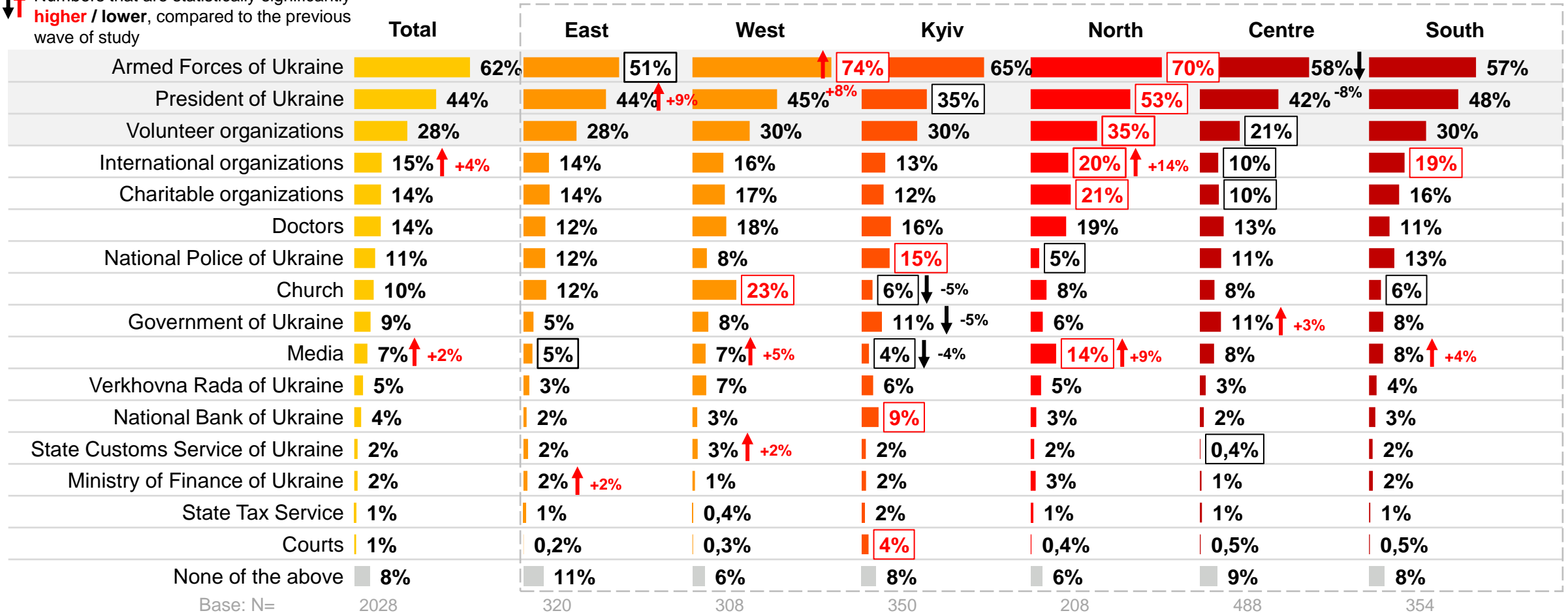
Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

TRUST IN INSTITUTIONS

by region

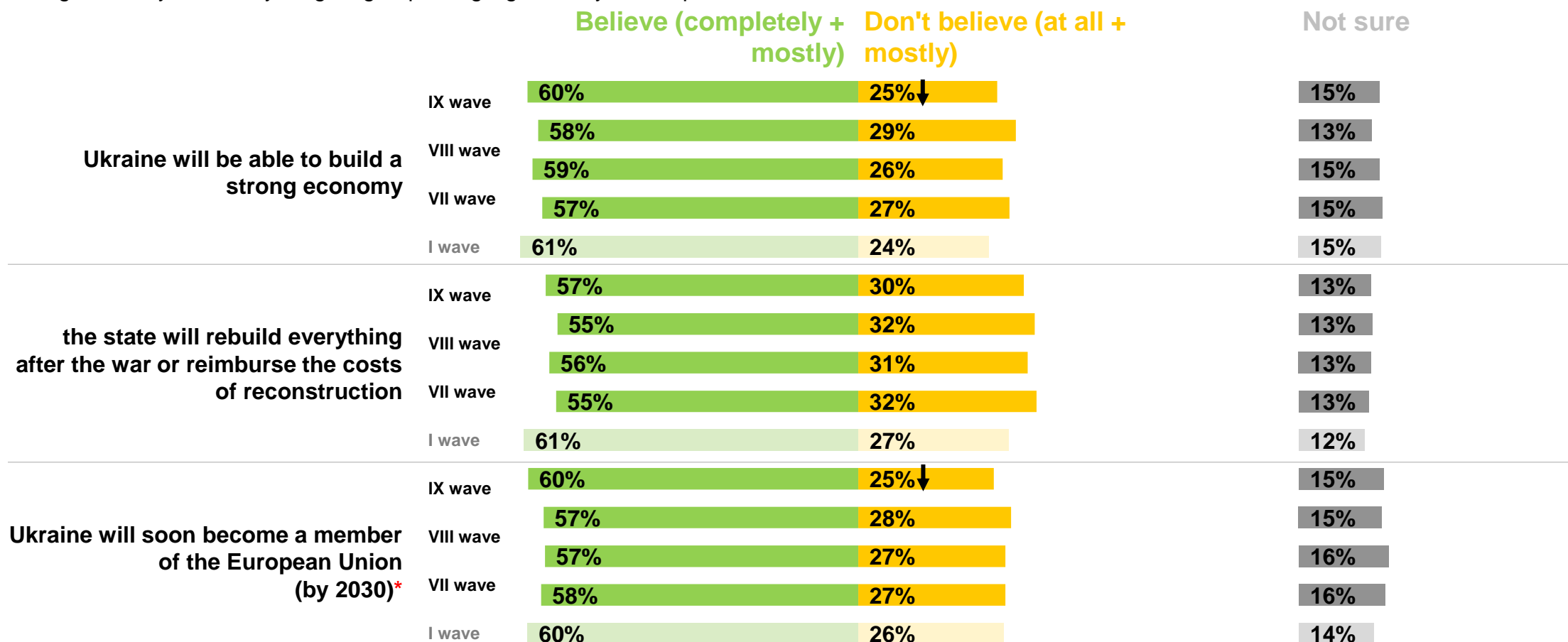
People from the Eastern region still express the lowest level of trust in the Armed Forces of Ukraine (51%), while residents of the West and the North - the highest level of trust (74% and 70%, respectively); among residents of the Center, trust in the Armed Forces of Ukraine decreased significantly. When it comes to trust in the President, he is currently least trusted not in the East - there the level of trust has increased significantly - but in Kyiv (35%). In general, people from the North express trust in institutions more often (except for the police, which they trust less). The indicator of trust in mass media remains dynamic: trust in them has decreased in Kyiv, but it has increased among residents of the West, South and North.

↑ 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 unchanged - at the level of 55-58%. Compared to the previous wave, the gap between the 18-24 and 25-34 age groups has widened when it comes to belief in a strong economy, with the youngest group being 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, VII wave – N = 2005, VIII wave – N = 2060, IX wave – N = 2028.

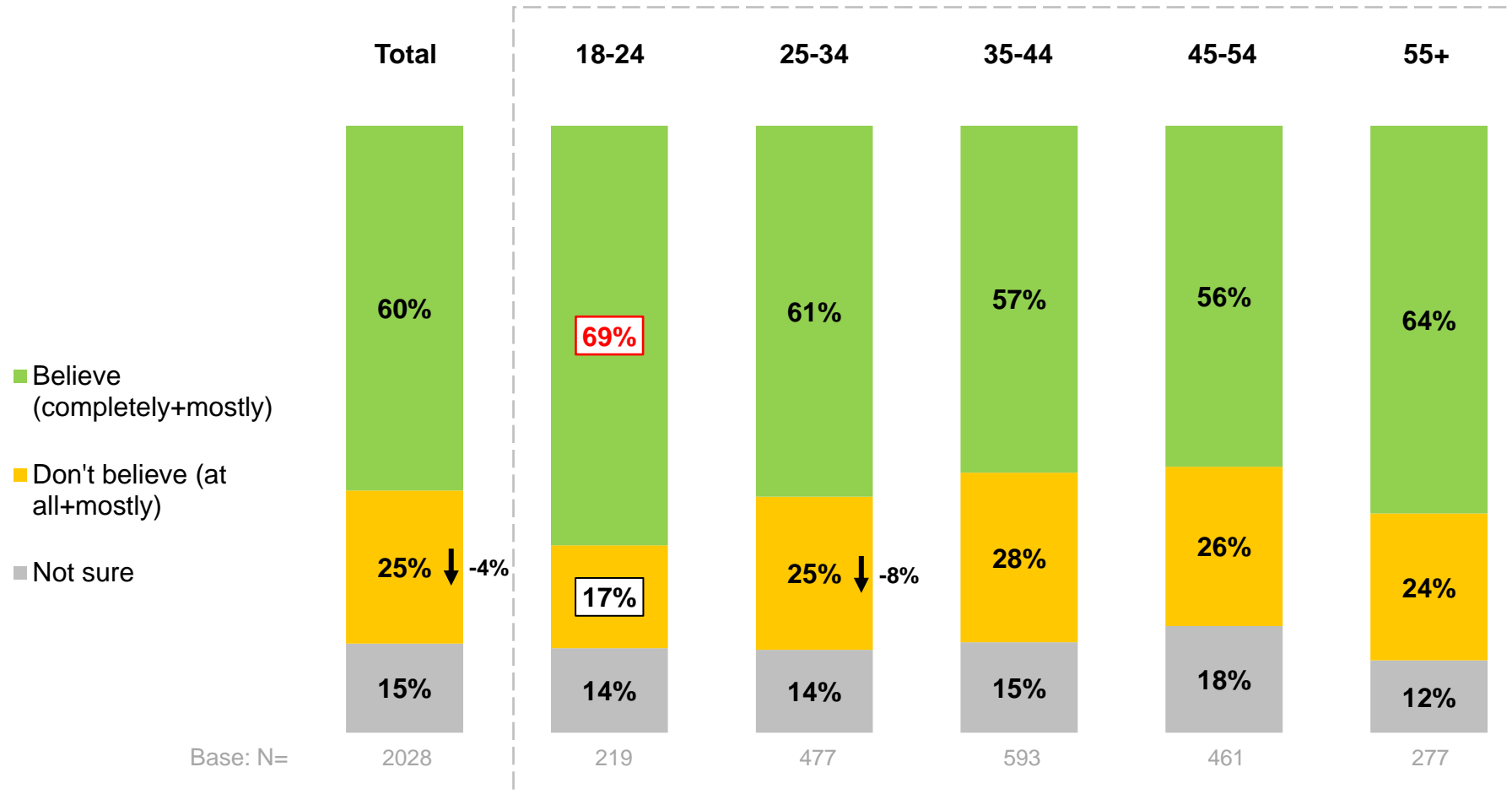
Do you believe that : Ukraine will be able to build a strong economy / the state will rebuild everything after the war or reimburse the costs of reconstruction / Ukraine will soon become a member of the European Union (by 2030)?

↓↑ 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;

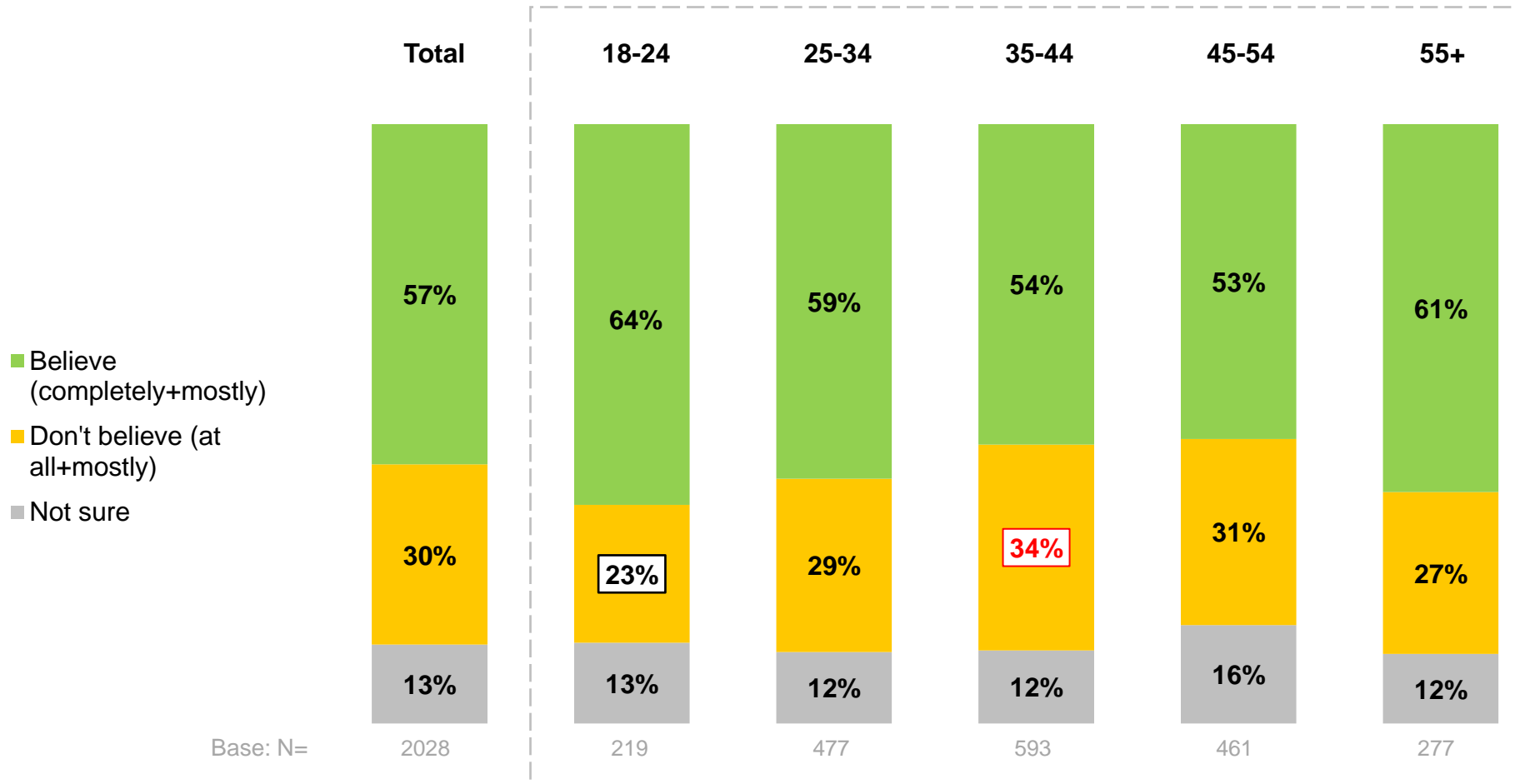
Do you believe that Ukraine will be able to build a strong economy?



 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;

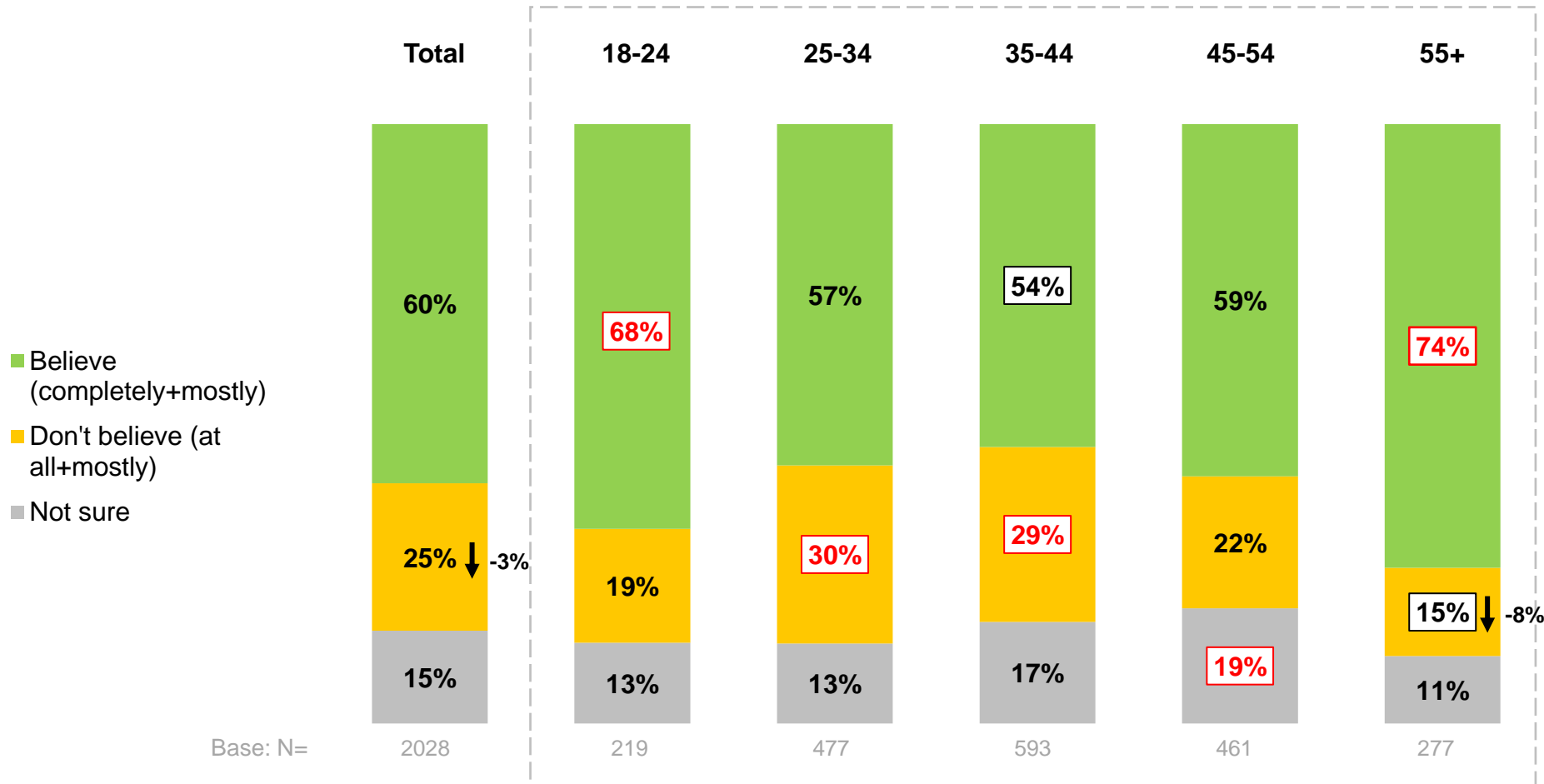
Do you believe that the state will rebuild everything after the war or reimburse the costs of reconstruction?

↓↑ 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

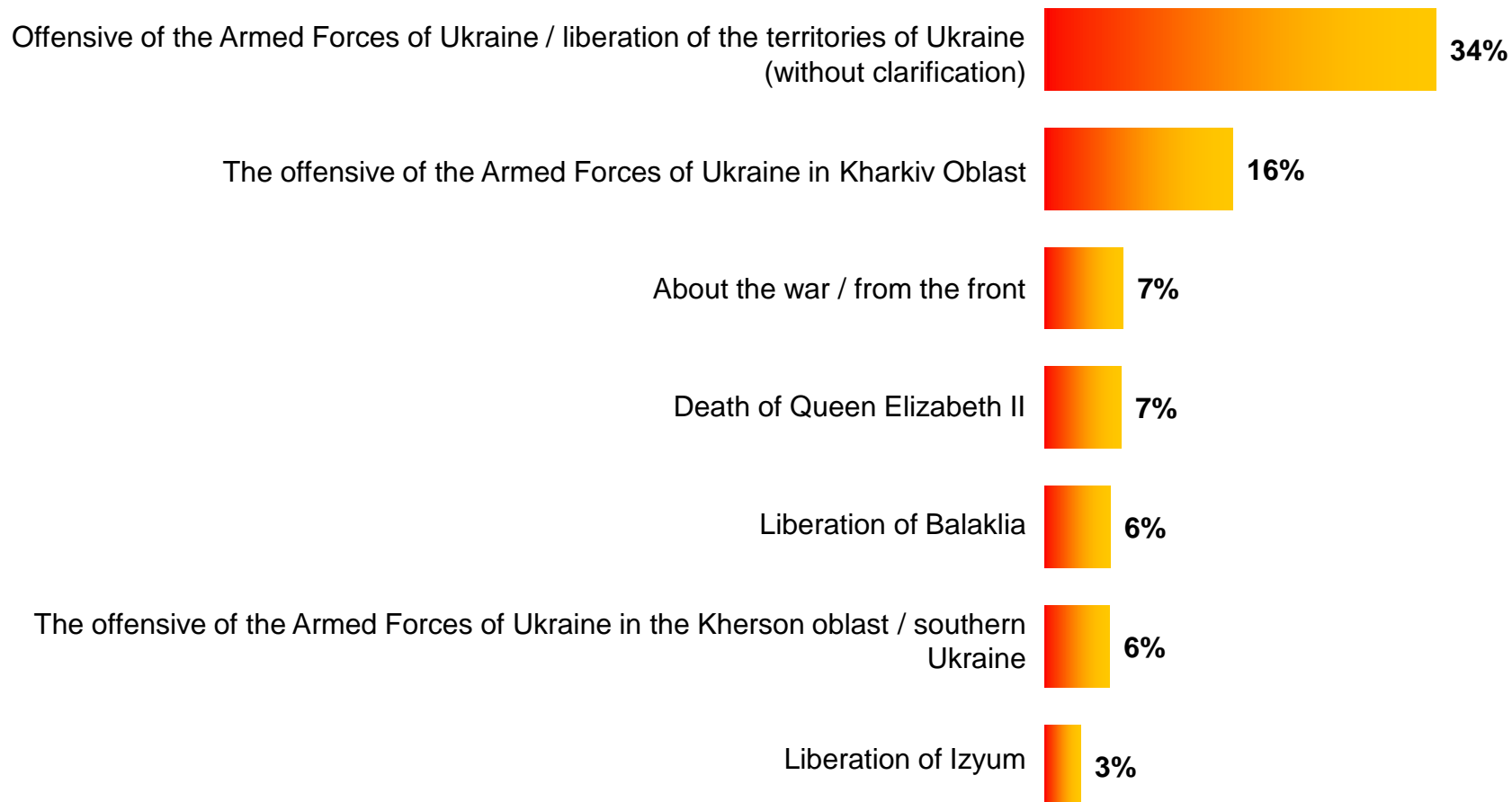
**LATEST NEWS:
KNOWLEDGE AND
PERCEPTION**



MOST IMPORTANT NEWS OF THE LAST WEEK

spontaneous answers

The majority of respondents mentioned the most important events of the last week those related to the successes of the Armed Forces of Ukraine at the front: liberation of the territories of Ukraine (without clarification) (34%), the offensive of the Armed Forces of Ukraine in Kharkiv (16%) and Kherson oblasts (6%), the liberation of Balaklia (6%) and Izyum (3%).



Base: all respondents, N=2028

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 the Armed Forces of Ukraine are conducting an offensive in Kherson and Kharkiv oblasts (75% each).
The least number of respondents are aware that the EU will allocate to Ukraine aid in the amount of EUR 500 million (27%).



KNOWLEDGE OF THE EVENTS


by region

Respondents from the West significantly more often heard that the Armed Forces of Ukraine are conducting an offensive in the Kherson oblast. Respondents from the East less often heard about this news, as well as about the explosion at the ammunition exhibition in Chernihiv, while respondents from the North heard about this explosion more often. Respondents from Kyiv more often heard that the EU will allocate aid to Ukraine in the amount of EUR 500 million, while respondents from the Centre - less often.

	Total	East	West	Kyiv	North	Centre	South
The Armed Forces of Ukraine are conducting an offensive / liberation of Kherson oblast	75%	67%	83%	78%	71%	79%	73%
The Armed Forces of Ukraine are conducting an offensive / liberation of Kharkiv oblast	75%	78%	80%	79%	72%	77%	66%
The IAEA published a report after a visit to the Zaporizhzhya NPP	51%	50%	53%	53%	50%	49%	50%
An explosion at an ammunition exhibition in Chernihiv	45%	38%	47%	50%	57%	43%	43%
The "Commandant" of the occupation authorities of Berdyansk died as a result of the explosion of his car	33%	30%	29%	34%	30%	29%	43%
The EU will allocate EUR 500 million as aid to Ukraine	27%	28%	24%	34%	32%	22%	27%
Not sure / Have not heard about any of these	8%	5%	5%	7%	9%	11%	12%
Base: N=	2028	320	308	350	208	488	354

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 65

KNOWLEDGE OF THE EVENTS


by age

Respondents of the 55+ age group are the most aware about all the important events of the last week from the list. Respondents aged 18-24 know about the liberation of the Kharkiv oblast by the Armed Forces of Ukraine significantly less than the sample in general, respondents aged 25-34 - about the liberation of the Kherson oblast and the explosion of ammunition at the exhibition in Chernihiv. Respondents aged 35-44 years heard less than the sample in general about the IAEA report after the visit to the ZNPP, the death of the "commandant" of the occupation authorities of Berdyansk and the allocation of 500 million euros of EU as aid to Ukraine.

Total	18-24	25-34	35-44	45-54	55+
The Armed Forces of Ukraine are conducting an offensive / liberation of Kherson oblast 75%	71%	70%	72%	75%	97%
The Armed Forces of Ukraine are conducting an offensive / liberation of Kharkiv oblast 75%	63%	73%	73%	77%	90%
The IAEA published a report after a visit to the Zaporizhzhya NPP 51%	44%	48%	43%	54%	71%
An explosion at an ammunition exhibition in Chernihiv 45%	39%	39%	42%	46%	68%
The "Commandant" of the occupation authorities of Berdyansk died as a result of the explosion of his car 33%	27%	30%	25%	34%	55%
The EU will allocate EUR 500 million as aid to Ukraine 27%	26%	25%	21%	27%	42%
Not sure / Have not heard about any of these 8%	13%	11%	8%	8%	1%
Base: N= 2028	219	477	593	461	277

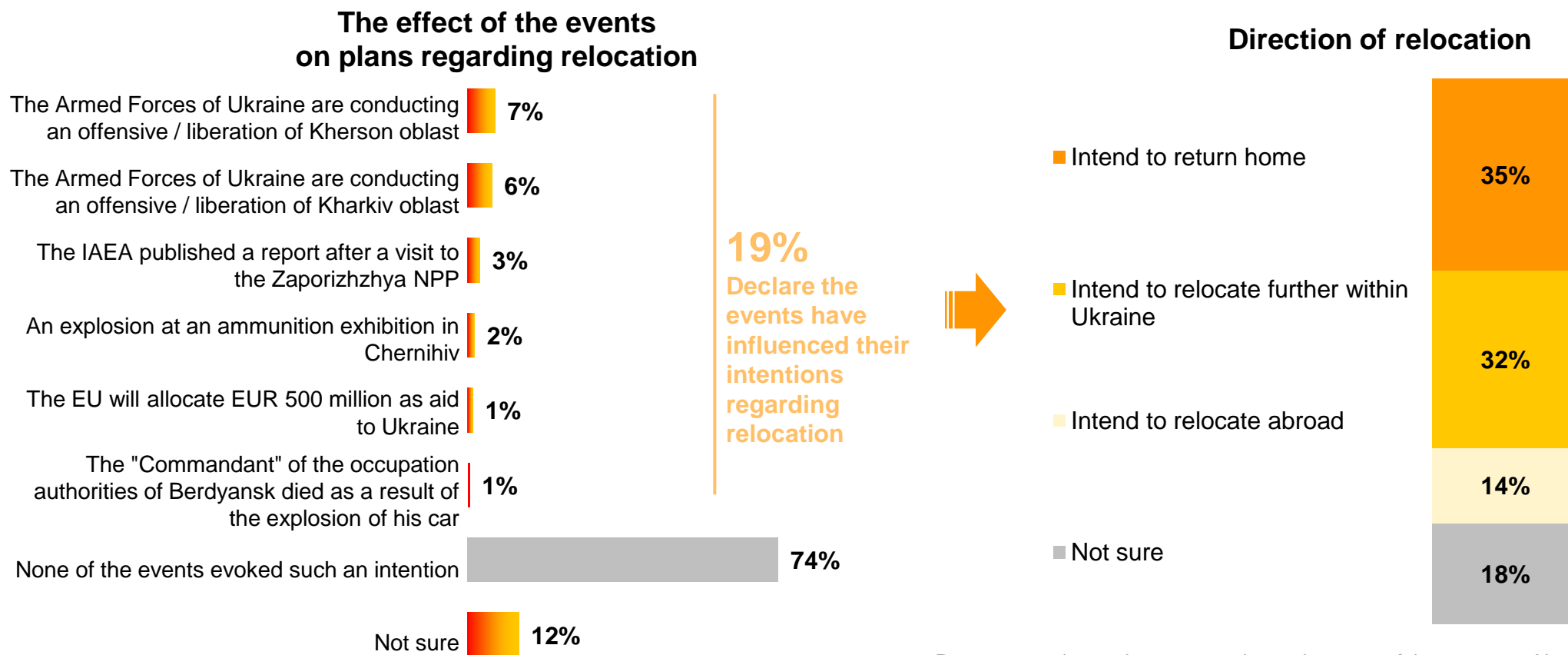
Base: all respondents

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 ON RELOCATION PLANS AND DIRECTION OF PLANNED RELOCATION

For the majority of respondents (74%), none of the news had an impact on their migration intentions. While 19% indicated that at least one event influenced their intention to relocate: a third indicated (35%) that they intend to return to their permanent place of residence and 32% intend to migrate within Ukraine.



Base: respondents who want to relocate because of these events, N = 248

Base: those who stayed in Ukraine and have heard about the aforementioned events, N = 1859

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

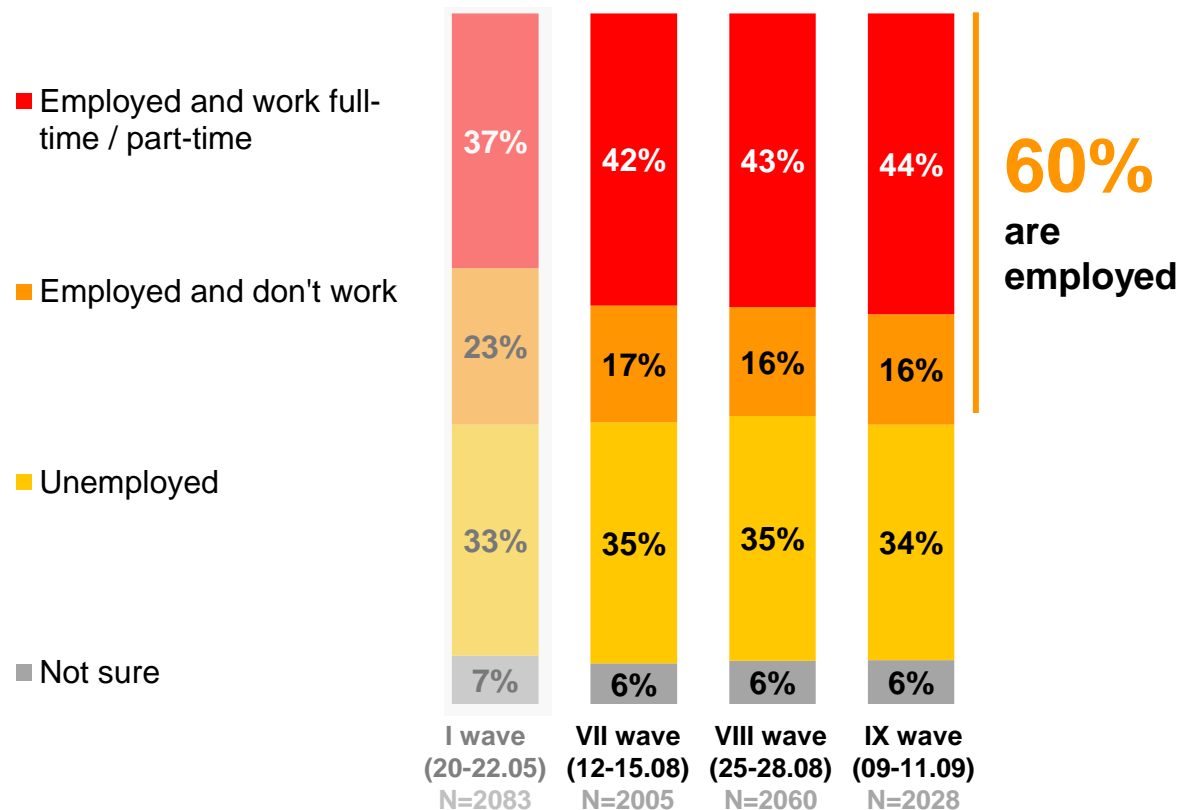
EMPLOYMENT DURING THE WAR



EMPLOYMENT DURING THE WAR

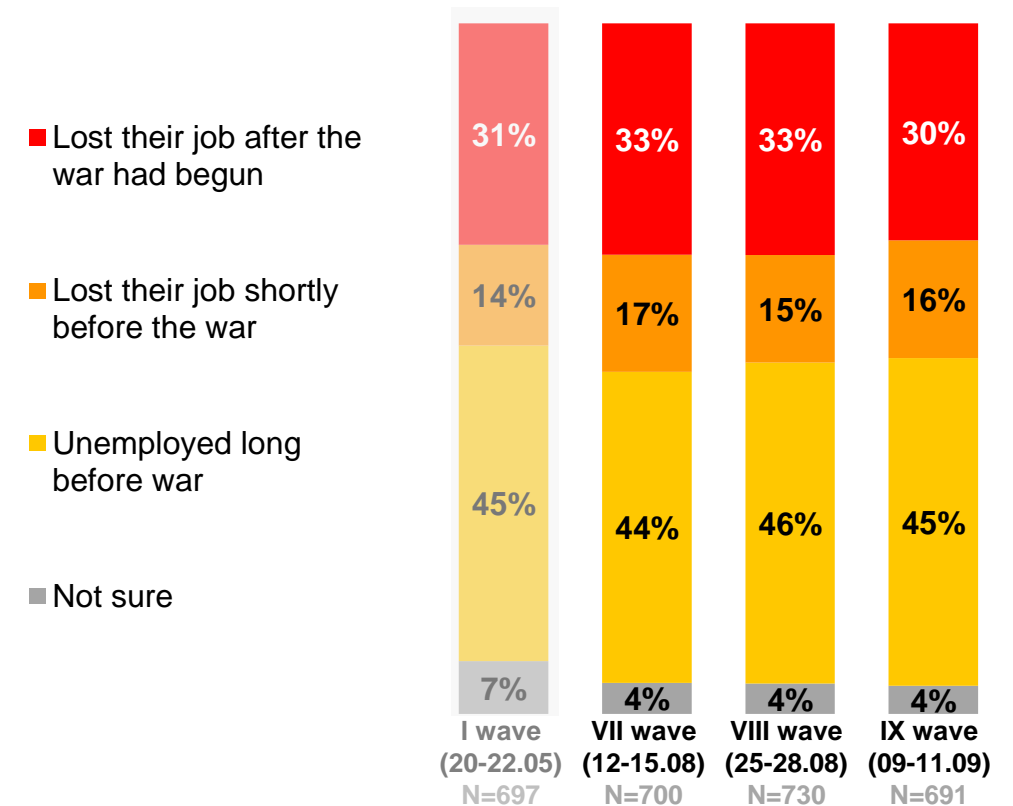
In the current wave, there were no recorded significant changes in employment status - 60% of Ukrainians* have a job. At the same time, 44% of them actively work full-time / part-time, and 16% do not perform any work tasks, although they are employed. 34% of Ukrainians* are unemployed – a third of them (30%) lost their jobs since the beginning of the war, and 45% 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?

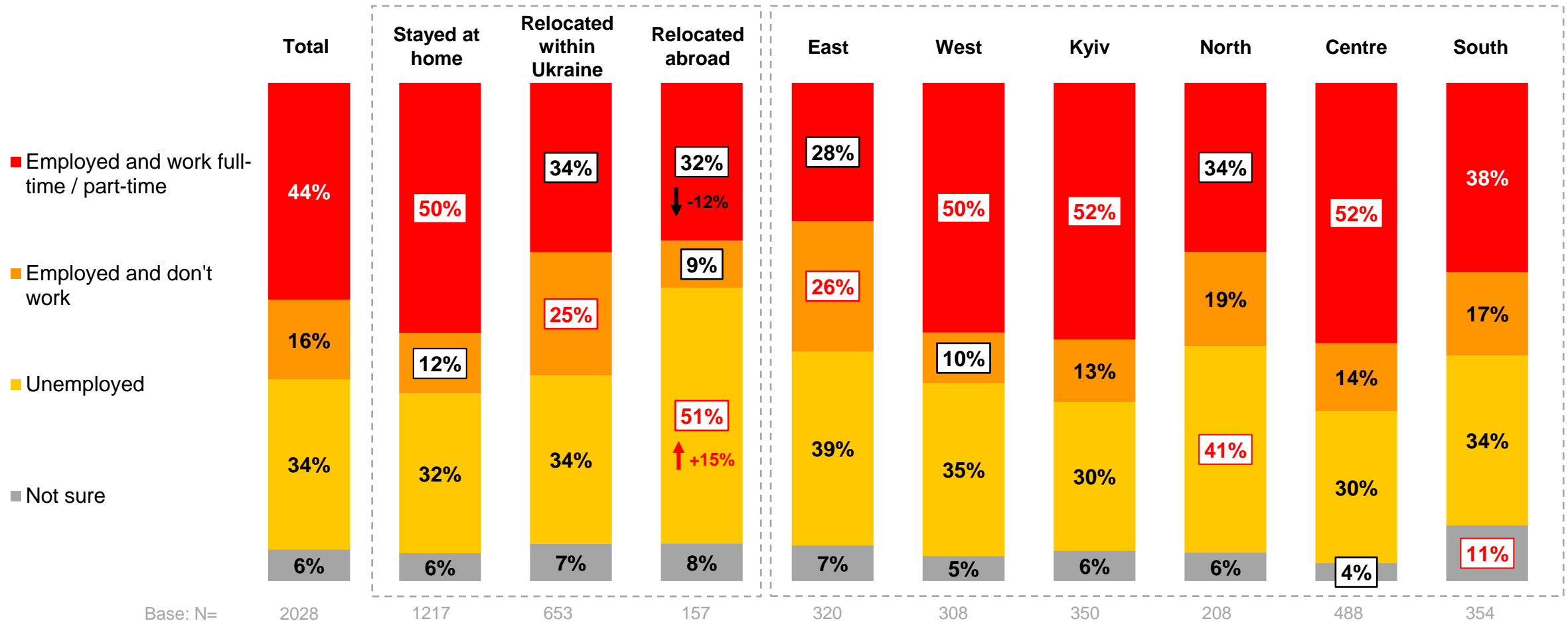
Which of the following phrases best describes your situation:

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

EMPLOYMENT DURING THE WAR

by migration status and region

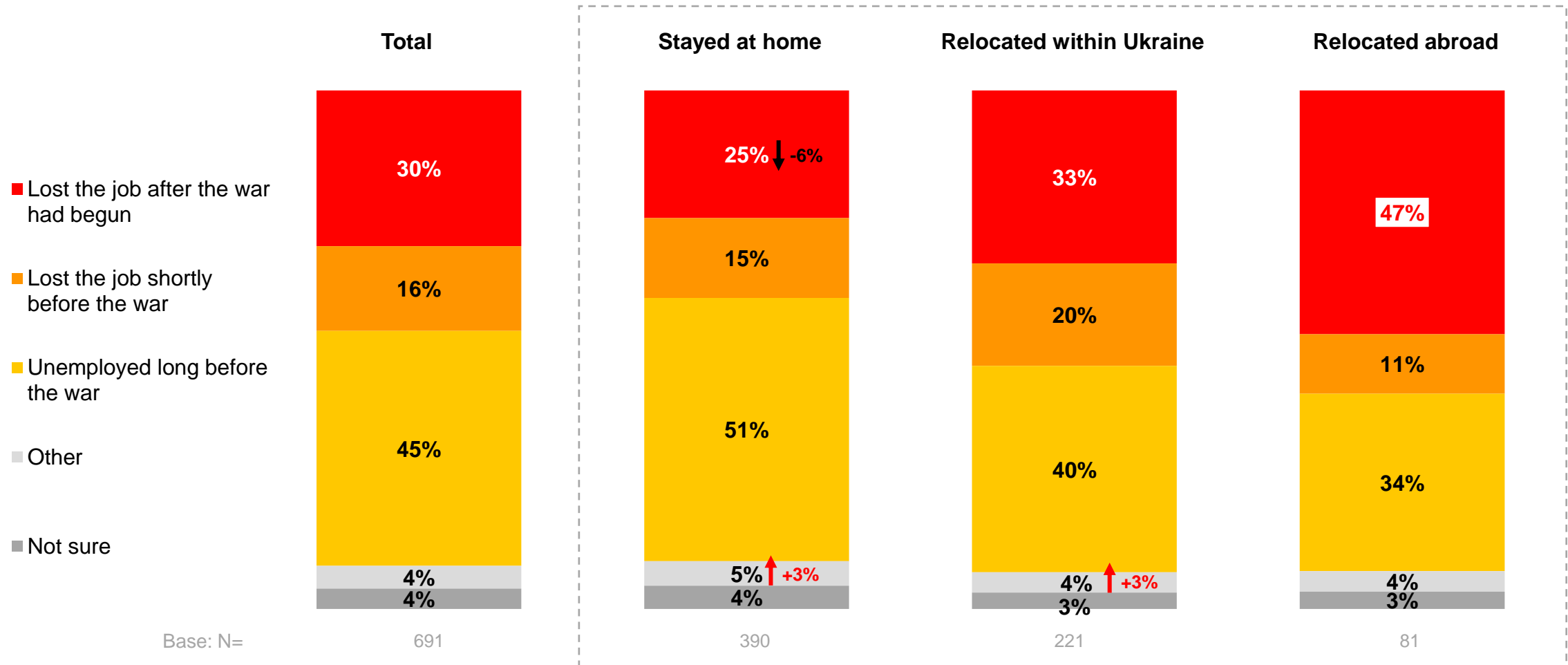
Among those who stayed at home, as well as among the residents of Kyiv, Western and Central regions, there is a significantly higher share of those who have a job and are actively working. Among external migrants, the share of those who have a job decreased to the 7th wave indicators (-12 p.p.).



UNEMPLOYMENT SPECIFICS

by migration status

The highest share of those who lost their jobs since the beginning of the war is among the respondents who relocated abroad. While among those who remained, this share decreased by 6 p.p., compared to the previous wave.



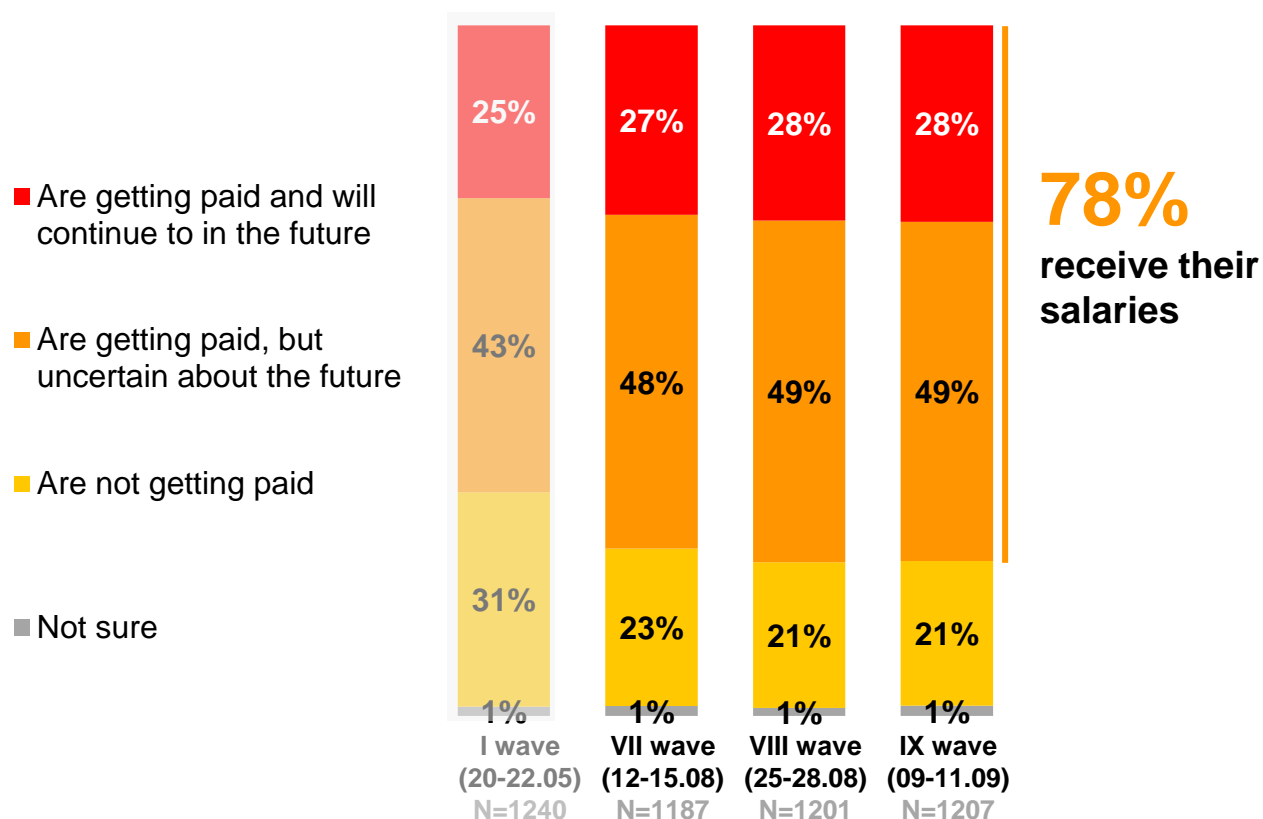
Base: respondents who are unemployed now
Which of the following phrases best describes your situation:

 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

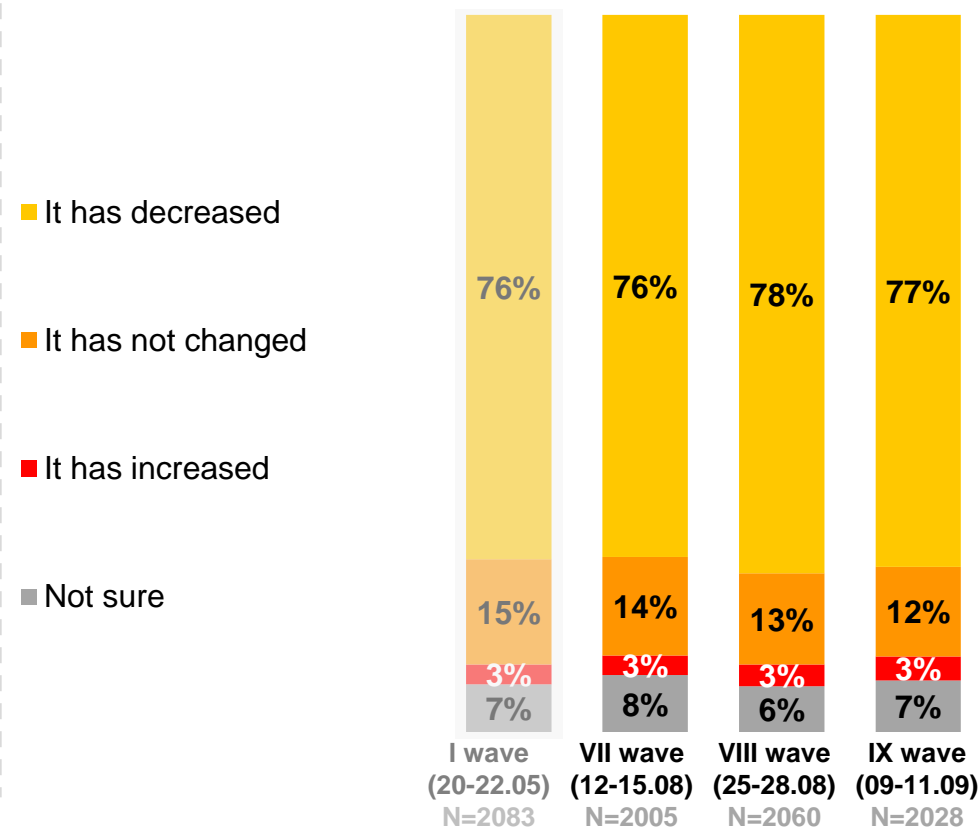
INCOME DURING THE WAR

The majority of Ukrainians continue to declare a decrease in income since the beginning of the full-scale invasion (77%), and only 3% indicate that their income has increased. There are no observed particular changes in income stability among the employed population - 78% continue to receive a salary. 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:



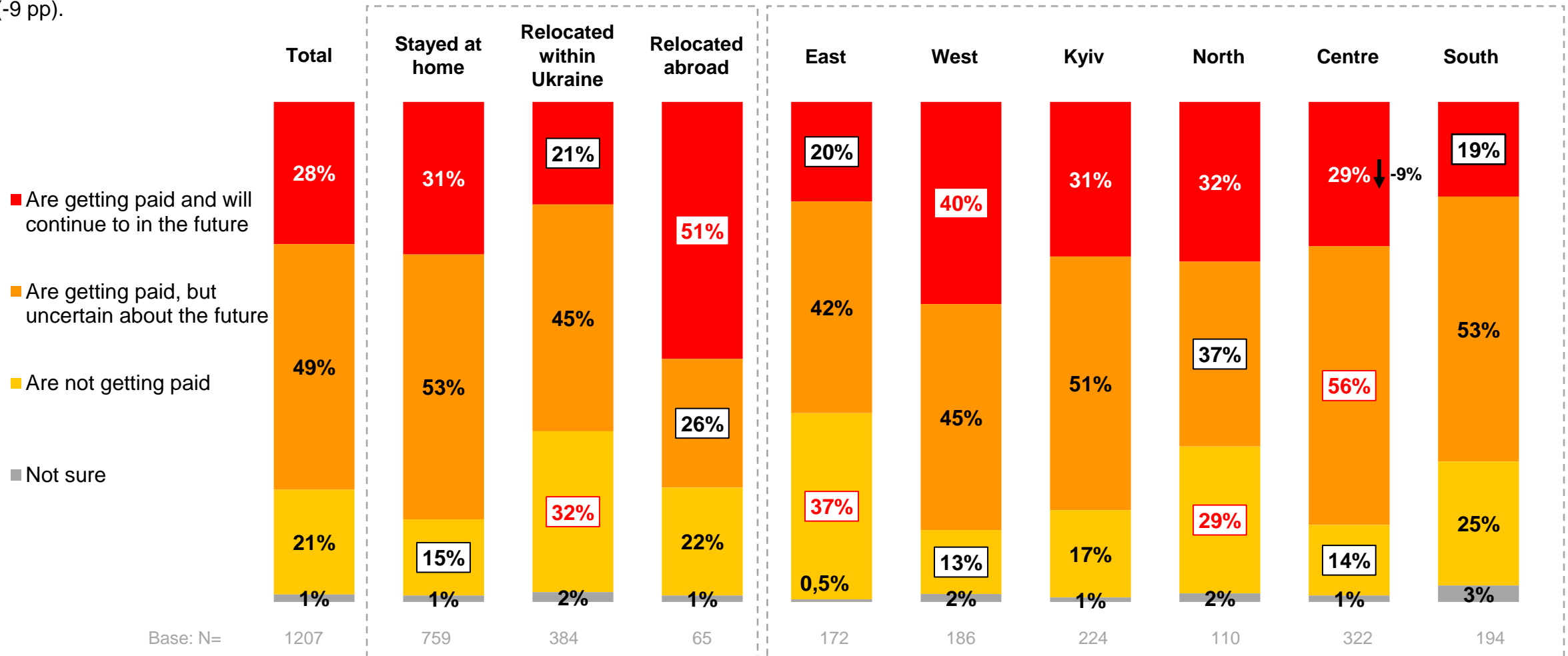
Changes in income:




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 have relocated abroad, as well as residents of the West. In the 9th wave of the survey, in the Centre, the share of those who receive salary and will continue to receive it in the future also significantly decreased (-9 pp).



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

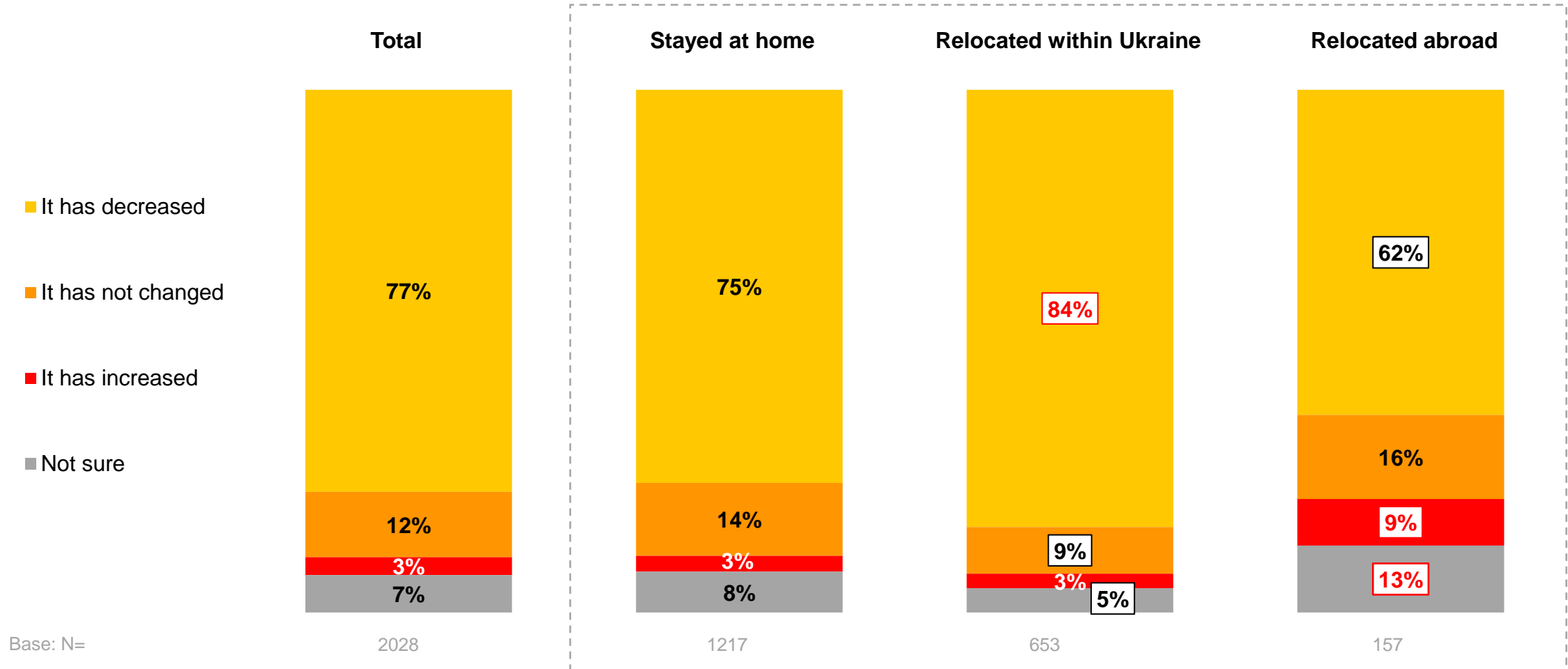
 Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

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

INCOME CHANGES

by migration status

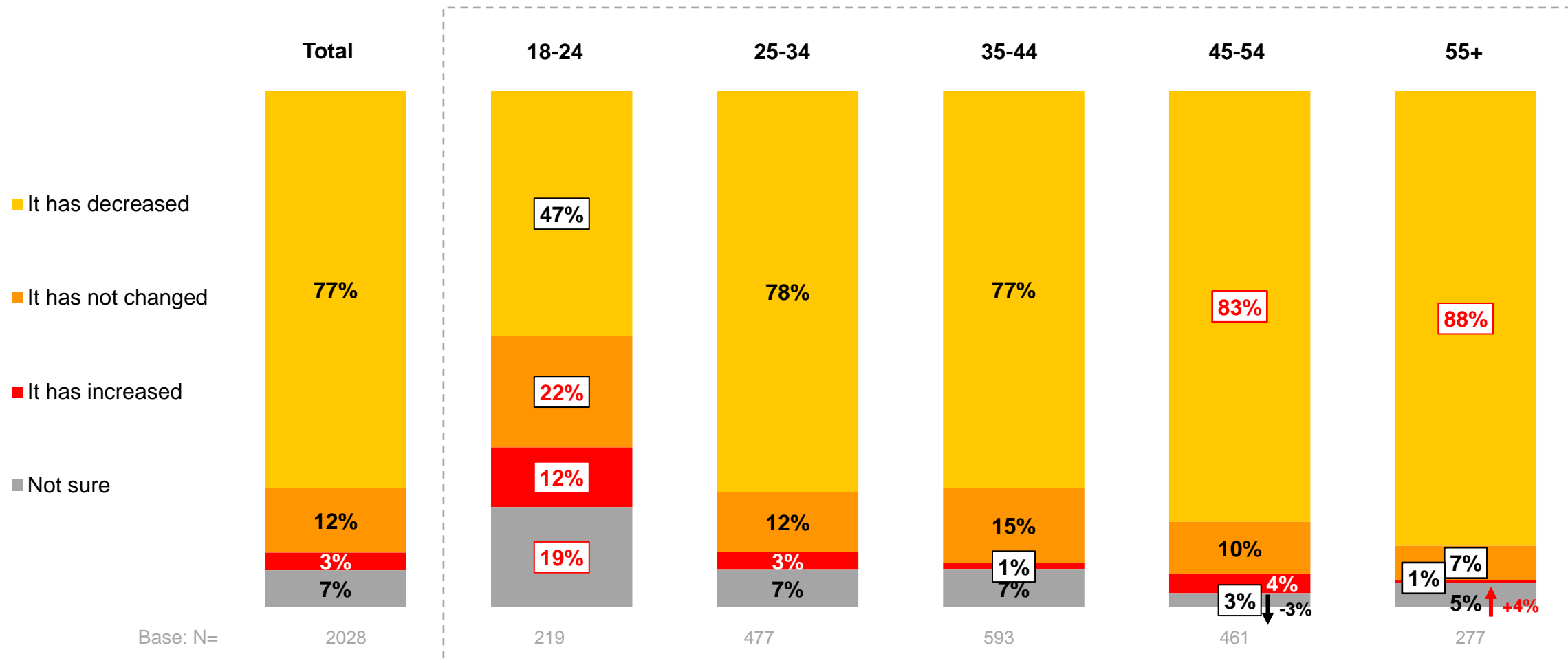
As in the previous wave, the largest share of those whose income decreased after the beginning of the full-scale war was recorded among internal migrants (84%). While among those who relocated abroad, there are significantly less of those whose income decreased (62%); among them is also the most pronounced group of those whose income has increased (9%).



INCOME CHANGES

by age

The largest share of those whose income has decreased is observed among respondents over 45 years, and the smallest - among the respondents of 18-24 age group.



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

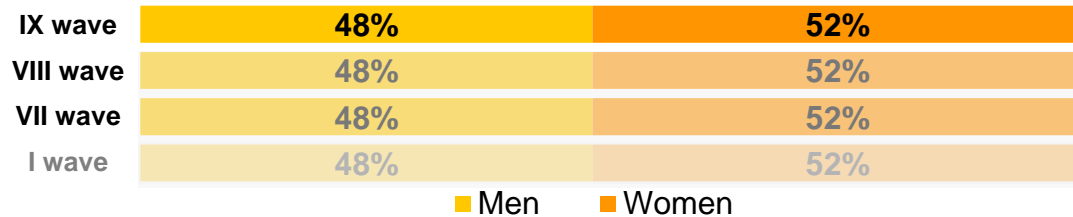
Numbers that are statistically significantly higher / lower, compared to the previous wave of the study

SAMPLE STRUCTURE

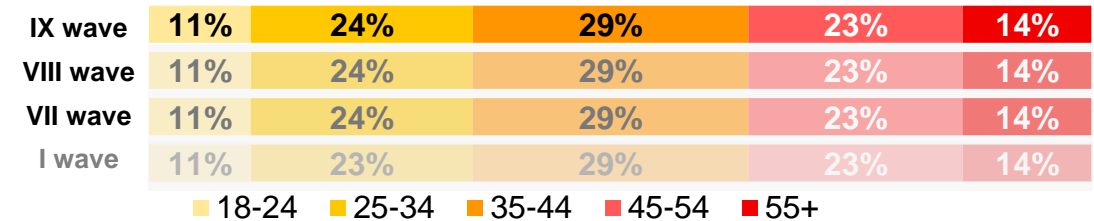


SAMPLE STRUCTURE

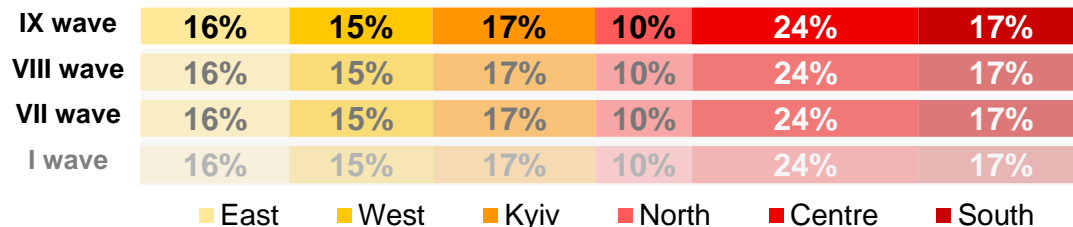
Gender



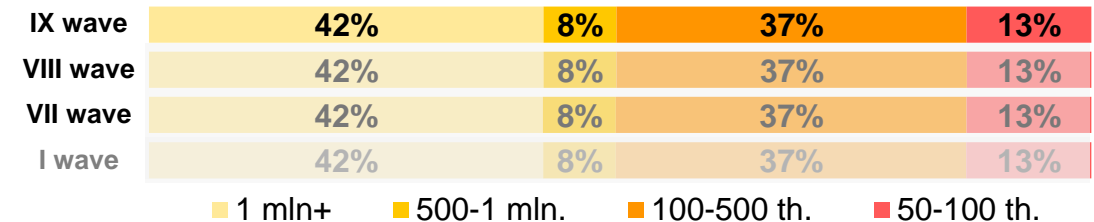
Age



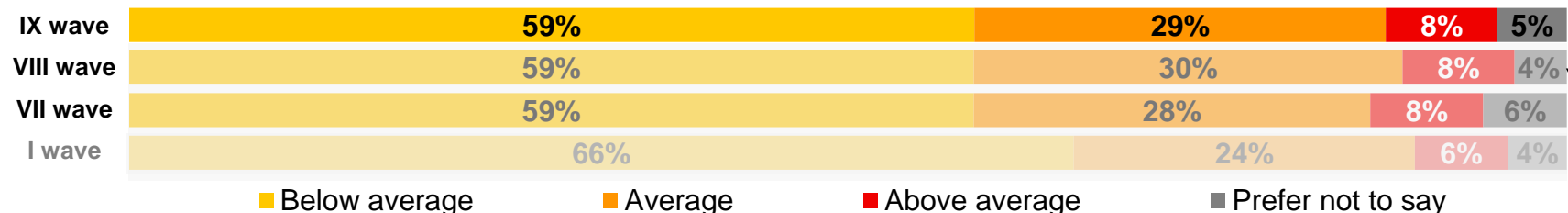
Region (before the war)



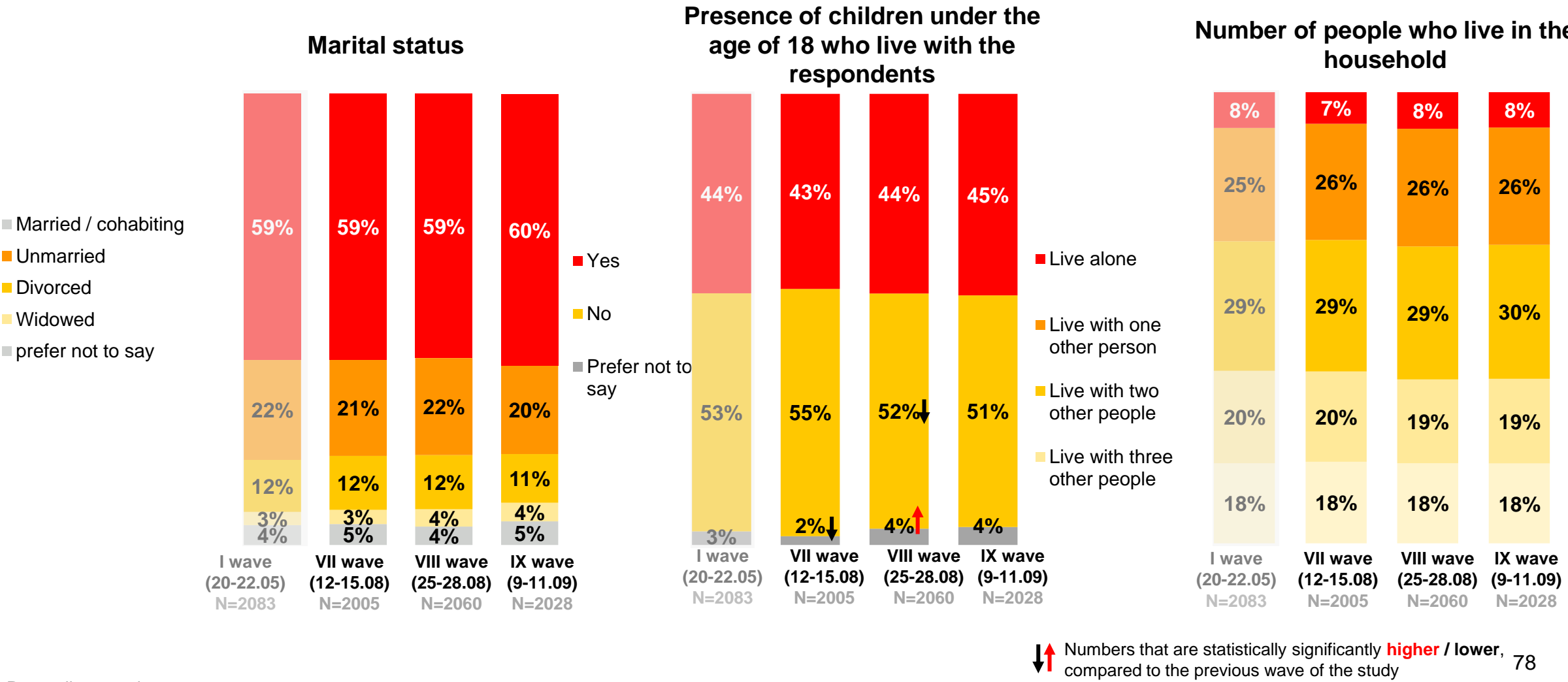
Size of settlement (before the war)



Income level



SOCIO-DEMOGRAPHIC PROFILE



SOCIO-DEMOGRAPHIC PROFILE

by migration status (IX wave)

		Total	Stayed at home	Relocated within Ukraine	Relocated abroad
Gender	Men	48%	49%	53%	20%
	Women	52%	51%	47%	80%
Age	18-24	11%	10%	11%	16%
	25-34	24%	22%	28%	16%
	35-44	29%	28%	32%	28%
	45-54	23%	24%	20%	21%
	55+	14%	15%	10%	18%
Region (before the war)	East	16%	7%	32%	19%
	West	15%	18%	8%	20%
	Kyiv	17%	15%	21%	20%
	North	10%	10%	11%	7%
	Centre	24%	32%	11%	16%
	South	17%	18%	16%	18%
Income level	Below average	59%	60%	59%	45%
	Average	29%	27%	29%	39%
	Above average	8%	6%	9%	14%
	Prefer not to say	5%	6%	4%	2%
Marital status	Married / cohabiting	60%	60%	62%	53%
	Unmarried	20%	19%	22%	15%
	Divorced	11%	11%	10%	14%
	Widowed	4%	3%	2%	17%
	Prefer not to say	5%	6%	4%	1%
Presence of children under the age of 18 who live with the respondents	Yes	45%	43%	45%	56%
	No	51%	52%	52%	44%
	Prefer not to say	4%	5%	4%	1%
Number of people who live in the household	Live alone	8%	10%	5%	6%
	Live with one other person	26%	27%	23%	27%
	Live with two other people	30%	29%	33%	24%
	Live with three other people	19%	17%	22%	18%
	Live with 4 other people and more	18%	17%	17%	25%
Base, N		2028	1217	653	157

Base: all respondents



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



MOVING FORWARD
TOGETHER



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