



Centre for
Economic
Recovery

Gradus Research
Company



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

Analytical report

October 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	XI wave – 2060
II wave – 2045	VII wave – 2005	
III wave – 2008	VIII wave – 2060	
IV wave – 2012	IX wave – 2028	
V wave – 2007	X wave – 2000	



Field period of the survey (2022 year):

I wave – May 20 – May 22	VI wave – July 29 – August 1	XI wave – October 7 – October 10
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	X wave – September 23 – September 26	

SUMMARY (1/4)

Ukrainians'* actions during the war

- In the eleventh wave, **there were no significant differences regarding the migration status of Ukrainians* compared to the previous wave**: among Ukrainians* in general, **59% of respondents stayed at their permanent place of residence** (more often these are residents of the Centre – 78% and the West – 76%). The rest (41%) of the audience **changed their place of residence**. Among **those who migrated**, 20% have already **returned home** (more often these are residents of Kyiv and the North – 36% and 34%), while 21% **continue to be far from home** (mainly these are residents of the East – 57%).
- The distribution of answers regarding migration directions also remained without significant changes: the vast majority (61%) of the respondents migrated **to another oblast of Ukraine** (mainly to the western oblasts), 20% **relocated to other localities within the oblast**, and 19% **relocated abroad** (mainly to Poland and Germany).
- Compared to the tenth wave, among Ukrainians* **who remained in Ukraine**, there was a decrease in the share of those **who have a desire to migrate within Ukraine in case of aggravation of the situation** (from 23% to 19%). In general, the majority (60%) of the respondents want to stay at their current place of residence, and 11% want to migrate abroad.
- The decrease in the desire to relocate within Ukraine can be explained by the decrease in the **possibility of relocation** in case of aggravation of the situation in the country (from 33% to 29%). In general, about half (45%) of the respondents declare that they cannot migrate to other places in the case of aggravation of the situation.
- The share of persons who **want to return home at the first opportunity** among those who went abroad and have not yet returned remains at the level of tenth wave (77%). Opportunities to stay abroad also remain without changes: 72% have such an opportunity, 21% do not have it, and 8% hesitate to answer.
- **Safety** in the settlement and, on the contrary, its absence remain the biggest **driver** (65%) and, accordingly, a **barrier** to the **return to Ukraine of those who went abroad** (71%).
- The distribution of **internal migrants' answers** regarding the desire and opportunity to **stay and live in a new place** remains without significant changes: the share of those who **want to return home** is 76%, and the share of those who want to stay is 13%; 49% have the opportunity to stay and live in the new place, and 41% do not have it.
- In the current wave, there was an increase in the share of people who declare the **involvement of their family members** in the Armed Forces of Ukraine (from 23% to 25%) and Territorial Defense Forces (from 13% to 15%). The level of involvement in volunteering remained unchanged at 22%.

* 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* are still unchanged – money (66%) and access to work (30%).
- As for **subjective assessments of the state of physical and mental health**, they remain at the level of the tenth wave, the largest share (47%) of respondents declare the presence of some problems with physical health, while the share of those who indicate the presence of some problems with mental health (43%) and the share of those who do not have them (42%) are approximately the same.
- As for the feeling of safety, about a **third** of the respondents (30%) **feel safe at the moment** (a significantly larger share of such a segment is among those Ukrainians who migrated abroad), while **almost half of the respondents** (46%) noted that they **sometimes feel unsafe**, and 17% declare that they **do not feel safe**).
- According to the respondents **who had the experience of relocation**, the **majority of the local population treated them kindly** in the new place – this is declared by 84% of the respondents.
- **Humanitarian aid** from the Ukrainian state was received by 35% of respondents (69% in the East and 49% in the North), and this indicator is stable in the current wave. Mainly, the received aid was **in the form of** food (79%) and money assistance (44%). Among those who received humanitarian aid, 45% consider it **sufficient** and 47% – insufficient (the indicators are at the level of the previous wave).
- When it comes to the **external migrants**, 70% of them **received humanitarian aid** from the government of the state to which they relocated. Mostly, this was money assistance (78%), food (71%), hygiene and sanitation products (64%), temporary housing (56%) and clothes (51%). At the same time, the majority of respondents (79%) evaluate this assistance as sufficient.

SUMMARY (3/4)

Perception of the full-scale war with Russia

- In the eleventh wave, indicators of the **effectiveness of the Ukrainian authorities' actions** since the beginning of the war in general and in the field of military protection in particular stopped growing and **remain at the high level**: 67-72%. The assessment of the Ukrainian authorities' actions in the spheres of the economy has not changed significantly: half (48-50%) of respondents consider such actions effective. The evaluation of the effectiveness of the government's actions with regard to aiding those who lost their jobs also has not changed: it is at 31%. In turn, when it comes to the assistance for those who have lost property, this indicator has increased and is currently at the level of the first wave – 38%.
- **In general, the largest shares of respondents continue to trust the Armed Forces of Ukraine (64%) and the President of Ukraine (44%).** The level of trust in the Armed Forces of Ukraine increased this time (among all migration groups, as well as among certain age and regional groups), while the percentage of distrust in all institutions from the list decreased to the level of the ninth wave.
- **A stable high percentage of Ukrainians* are optimistic about the future** – 64% believe that Ukraine will be able to build a strong economy, 65% – that Ukraine will become a member of the European Union by 2030 (both indicators have increased significantly in the eleventh wave and are at the highest level since the beginning of the survey). 60% of respondents are confident that the state will rebuild everything after the war – or reimburse the costs of reconstruction.

The importance of values and observance of the principles

- **The majority of Ukrainians* invariably agree that human life, freedoms and rights, social harmony, mutual assistance and mutual trust are the greatest values** – the greatest degree of consensus exists with regard to the value of life. **The value of implementing superiors' orders remains the most controversial** in perception, however, the percentage of those who consider it important has increased significantly – such respondents now outnumber those who disagree – 44% vs 33%. Older people (55+) believe in the importance of life, human freedoms and rights, mutual assistance and trust the most; also, among them, there was a significant increase in the share of those who value the importance of implementing superiors' orders (by 17 percentage points).
- **The importance of observance of the equality between people, the principles of freedom, the principles of democracy, the rule of law, respect for human dignity and human rights is consistently high** and is at the level of 83-94%. The most widely supported of the principles is respect for human rights, and the least supported is the rule of law; at the same time, the importance of the latter principle was evaluated significantly higher in the eleventh wave. Older (55+) people agree with the importance of all principles significantly more than the sample in general, while young people (18-24) tend to hesitate to answer.

SUMMARY (4/4)

Latest news

- 47% of respondents encountered fake news, most often these news were related to the success of the Russian offensive (20%) and readiness for the heating season (12%).
- Over the past week, the most important events which respondents spontaneously mentioned were **the explosion on the Crimean Bridge** (44% spontaneously mentioned this event) and the offensive of the Armed Forces of Ukraine (22% spontaneously mentioned).
- The most important event in the last week which was mentioned with a prompt is liberation of the territory in the East and South of the country by the Armed Forces of Ukraine (71% and 70%, respectively). As for the other events of the week, 64% of the respondents are aware of the approval of the decision about the annexation of the Kherson, Zaporizhzhya, Luhansk and Donetsk oblasts by Russian parliament, and 56% know about the approval of the decision of NSDO about the impossibility of negotiations with V. Putin by V. Zelenskyy. The respondents know about the approval of the 8th package of sanctions against Russia by EU the least – 48%.
- **The majority** of respondents (75%) declared that **there were no events that influenced their intentions to relocate**, and 15% indicated that the events had an impact on their migration intentions. As for the latter, 37% indicated that they intend to return to their permanent place of residence, and 35% – plan to relocate further within Ukraine.

Employment during the war

- **57% of surveyed Ukrainians* have a job** – there are significantly more employed among residents of the Western region and Kyiv.
- The majority of employed people continue to receive a salary (77%), but less than a third (30%) are confident that they will continue to receive it in the future. Residents of the Western region are significantly more confident in the stability of their income (40%).
- **75% of respondents declare a decrease in their income since the beginning of the full-scale invasion** – this is significantly less (by 2 percentage points) compared to the previous wave. In the eleventh wave, there were no recorded characteristic differences between migration groups when it comes to changes in income; representatives of the 45+ age group continue to declare the most negative dynamics.

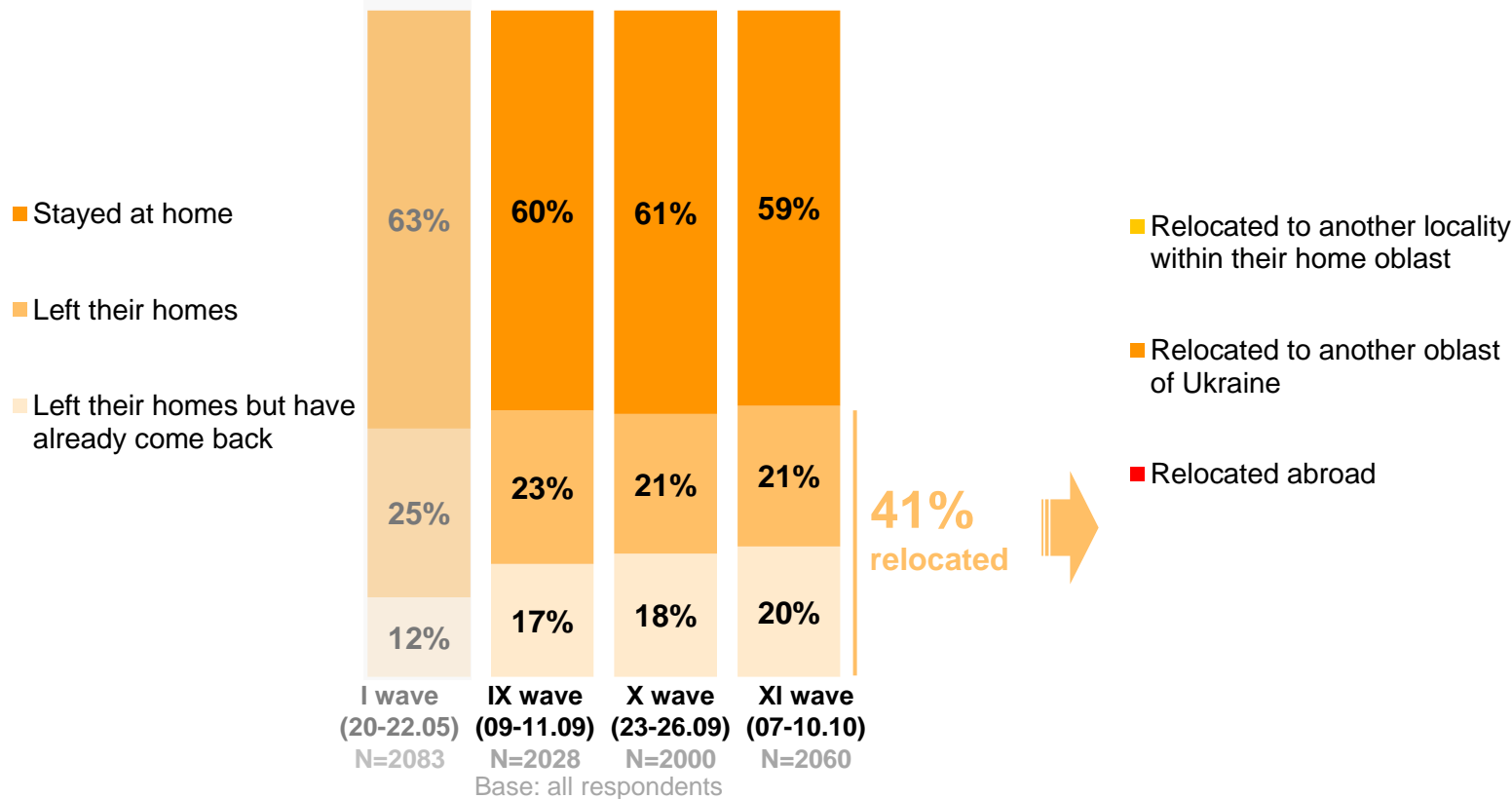
UKRAINIANS'* ACTIONS DURING THE FULL-SCALE WAR

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

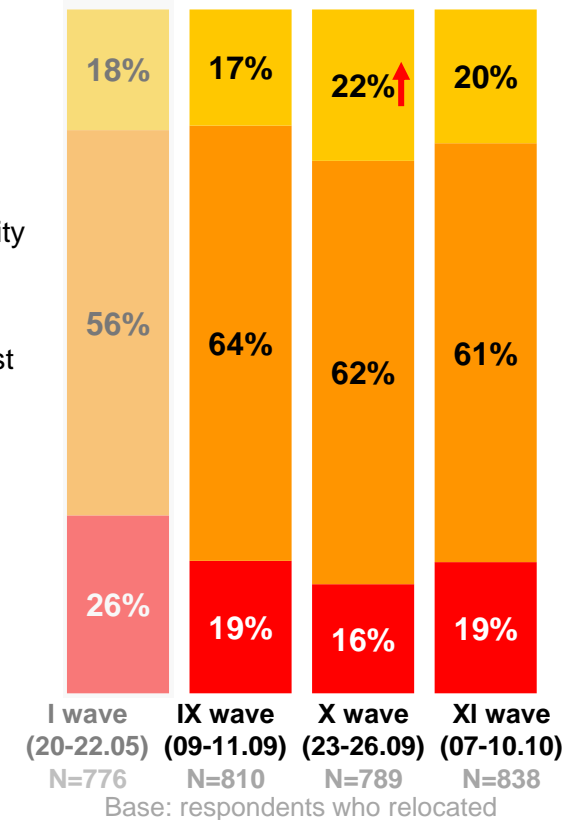
RELOCATION OF UKRAINIANS* DUE TO THE WAR

The distribution of migration processes remained without significant changes in the eleventh wave: 59% of respondents declared that they stayed at home, 41% – that they changed their place of residence. Compared to the previous wave, the directions of relocation also remain without changes: the majority of respondents (61%) migrated to another oblast, while 20% migrated within the oblast, and 19% relocated abroad.

Relocation of Ukrainians* due to the war



Relocation specifics



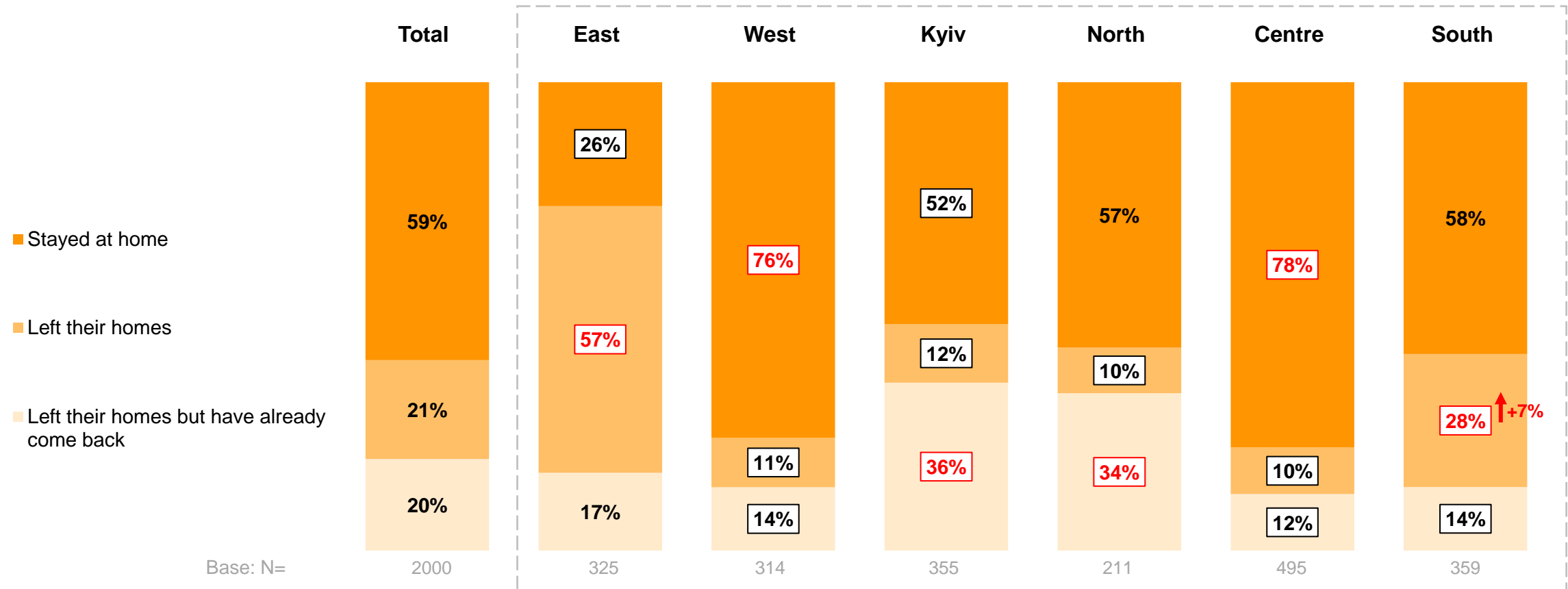
*Ukrainians - residents of cities with population of 50 thousand and more, aged 18+ years, who use smartphones
 Which of the following phrases best reflects your actions in the situation of Russia's war against Ukraine:
 In which direction were you forced to move:

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

RELOCATION DUE TO THE WAR

by regions

Regional differences in migration also remain without significant changes (the exception is the increase in the share of those who left their homes among residents of the Southern region). In general, residents of the West and the Centre remained 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 - more often left their homes; 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

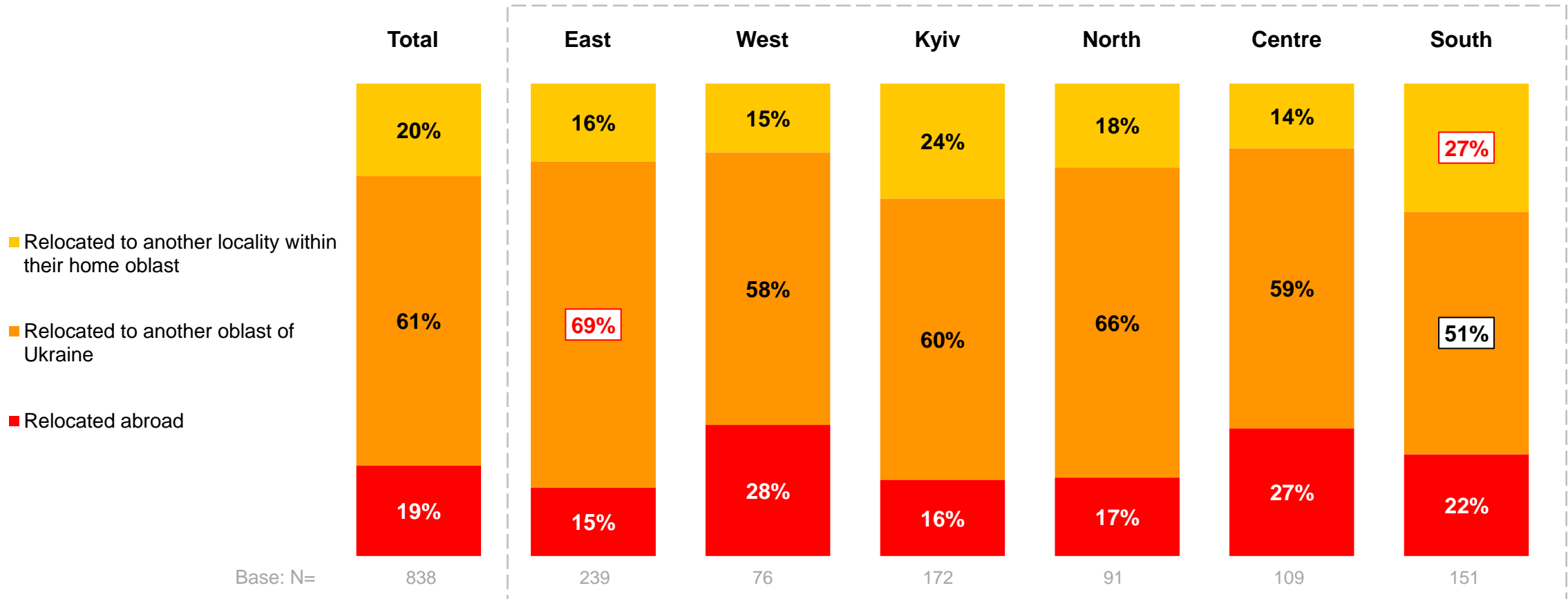


Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

DIRECTION OF RELOCATION

by region


In the current wave, there are no significant differences in migration directions depending on the region of residence, but regional peculiarities are becoming less noticeable: as in previous waves, residents of the South relocate to another oblast less often than other Ukrainians*. However, the differences between the West, the North, the Centre and Kyiv have become less noticeable – their indicators do not differ statistically from the indicators of Ukraine* in general. The only exception is residents of the East - they declare about relocation to another oblast more often than other Ukrainians*




*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 oblast remains the most popular for internal migration.

		Oblast from which relocated																				
<div></div> <div>Oblasts from which 20 or more respondents have relocated are marked by colour</div>		Total	Kyiv city	Kharkiv oblast	Donetsk oblast	Dnipropetrovsk oblast	Chernihiv oblast	Luhansk oblast	Zaporizhzhia oblast	Kherson oblast	Odesa oblast	Rivne oblast	Kyiv oblast	Mykolaiv oblast	Cherkasy oblast	Poltava oblast	Zhytomyr oblast	Lviv oblast	Sumy oblast	Volyn oblast	Kirovohrad oblast	Zakarpattia oblast
Oblast to which relocated (TOP-15)	Lviv oblast	15%	13%	10%	11%	11%	5%	0%	25%	18%	48%	70%	24%	39%	0%	11%	9%	0%	29%	7%	12%	11%
	Zakarpattia oblast	9%	12%	3%	3%	13%	0%	30%	2%	0%	7%	0%	20%	0%	3%	5%	34%	19%	15%	13%	51%	0%
	Ivano-Frankivsk oblast	7%	9%	8%	1%	7%	2%	0%	12%	5%	11%	3%	3%	7%	0%	0%	0%	19%	41%	15%	0%	0%
	Khmelnytskyi oblast	6%	9%	1%	0%	15%	11%	0%	0%	0%	0%	0%	13%	0%	28%	32%	14%	0%	0%	0%	14%	0%
	Cherkasy oblast	6%	8%	3%	2%	0%	49%	0%	2%	0%	4%	0%	15%	5%	0%	5%	0%	0%	0%	0%	0%	0%
	Vinnysia oblast	6%	10%	3%	6%	4%	0%	3%	8%	10%	9%	0%	3%	0%	4%	9%	14%	0%	6%	0%	12%	0%
	Chernivtsi oblast	6%	3%	9%	0%	13%	9%	0%	7%	0%	0%	6%	4%	0%	0%	10%	10%	0%	0%	22%	11%	61%
	Kyiv city	6%	0%	9%	13%	3%	2%	20%	3%	19%	0%	0%	0%	0%	0%	5%	0%	0%	0%	27%	0%	0%
	Dnipropetrovsk oblast	5%	1%	11%	19%	0%	0%	10%	11%	5%	0%	0%	0%	0%	0%	0%	6%	0%	0%	0%	0%	0%
	Ternopil oblast	5%	10%	3%	8%	0%	4%	0%	0%	5%	0%	15%	0%	0%	3%	0%	13%	14%	0%	0%	0%	0%
	Zhytomyr oblast	5%	10%	1%	8%	0%	10%	0%	0%	0%	4%	0%	9%	0%	0%	19%	0%	11%	0%	0%	0%	0%
	Volyn oblast	4%	4%	2%	1%	7%	3%	0%	30%	0%	4%	6%	2%	0%	0%	0%	0%	26%	0%	0%	0%	28%
	Poltava oblast	4%	2%	18%	6%	0%	2%	3%	0%	0%	4%	0%	0%	0%	0%	0%	0%	0%	10%	0%	0%	0%
	Kyiv oblast	3%	0%	6%	3%	0%	3%	8%	0%	23%	0%	0%	0%	5%	0%	0%	0%	0%	0%	9%	0%	0%
	Rivne oblast	3%	2%	2%	0%	11%	0%	0%	0%	11%	0%	0%	8%	25%	8%	0%	0%	11%	0%	7%	0%	0%
	Kirovohrad oblast	3%	1%	3%	3%	2%	0%	7%	0%	5%	10%	0%	0%	2%	32%	4%	0%	0%	0%	0%	0%	0%
	Zaporizhzhia oblast	3%	1%	4%	14%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Base: respondents who relocated to another oblast of Ukraine		513	102	82	58	31	27	24	24	19	19	16	16	15	13	11	9	9	8	7	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 emigration.

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

<div><div></div><div>Oblasts from which 20 or more respondents have relocated are marked by colour</div></div>		Oblast from which relocated									
		Total	Cherkasy oblast	Dnipropetrovsk oblast	Donetsk oblast	Zhytomyr oblast	Zakarpattia oblast	Poltava oblast	Odesa oblast	Lviv oblast	Chernivtsi oblast
Country to which relocated (TOP-16)	Poland	25%	22%	7%	36%	6%	45%	0%	5%	38%	36%
	Germany	18%	17%	28%	27%	44%	11%	7%	11%	21%	14%
	Italy	8%	4%	0%	12%	0%	0%	55%	0%	0%	0%
	Czech Republic	5%	2%	3%	7%	3%	11%	0%	5%	0%	0%
	Lithuania	3%	11%	0%	0%	0%	11%	0%	0%	0%	0%
	France	3%	2%	0%	0%	0%	13%	0%	0%	17%	16%
	Moldova	3%	0%	0%	0%	0%	0%	9%	47%	0%	0%
	Latvia	3%	0%	16%	0%	0%	0%	0%	0%	0%	0%
	Estonia	3%	0%	0%	3%	0%	0%	0%	27%	0%	0%
	Slovakia	3%	2%	0%	0%	0%	5%	0%	0%	0%	0%
	Turkey	3%	4%	8%	0%	0%	5%	0%	0%	0%	17%
	Belgium	2%	14%	0%	0%	0%	0%	0%	0%	0%	0%
	Spain	2%	4%	9%	4%	0%	0%	0%	0%	0%	0%
	Russia	2%	0%	9%	0%	0%	0%	0%	0%	0%	17%
	Romania	2%	0%	0%	0%	14%	0%	14%	0%	0%	0%
	Austria	2%	0%	6%	0%	0%	0%	0%	0%	0%	0%
	Base: respondents who relocated to another country		161	28	20	16	12	11	11	8	6

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

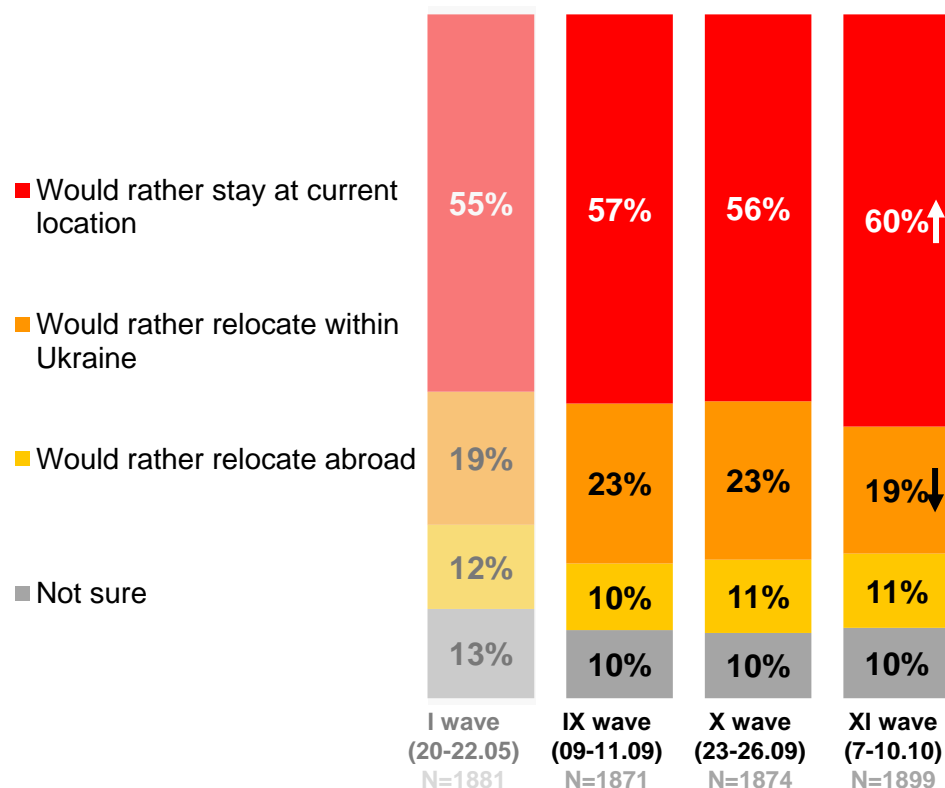
* Insufficient base for analysis
(observation of trend)

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

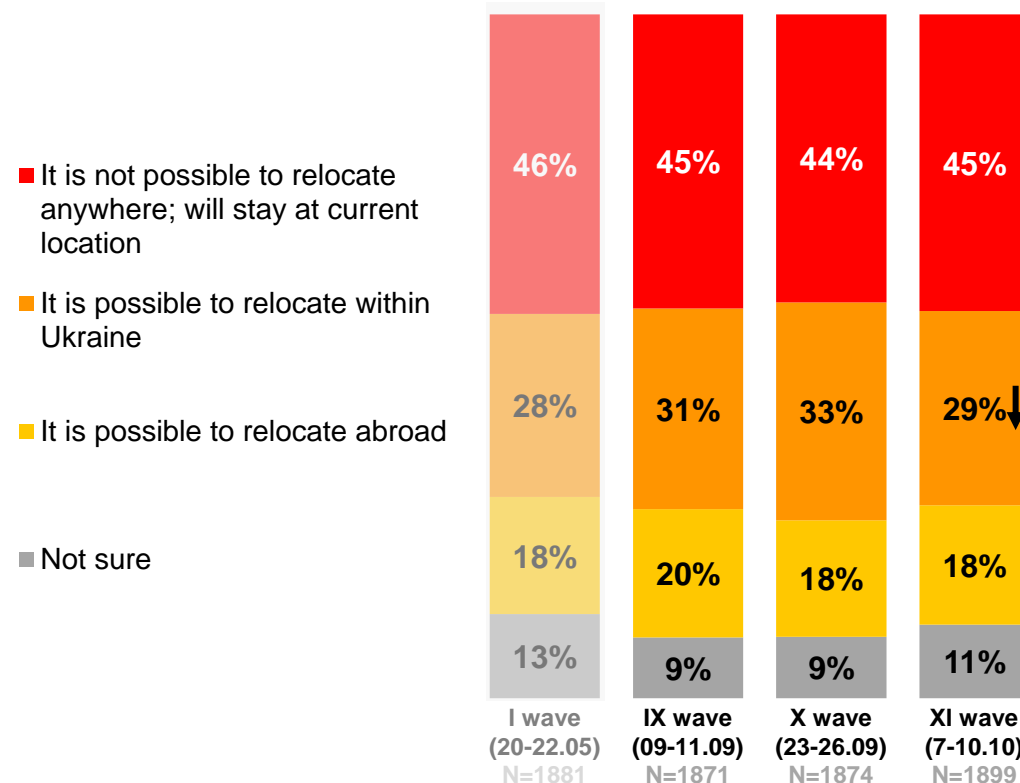
RELOCATION IN CASE OF AGGRAVATION. WISHES & OPPORTUNITIES

In the current wave, the share of people who want to stay in their current place of residence in the event of an aggravation of the situation has increased (from 56% to 60%, due to a decrease in the share of those who want and have the opportunity to migrate within Ukraine). 30% of respondents who currently remain in Ukraine want to change their place of residence (19% - migrate within Ukraine, and 11% - abroad). As for the opportunities of relocation, 45% do not have such an opportunity, 29% claim that they have the opportunity to migrate within Ukraine, and 18% - that they 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

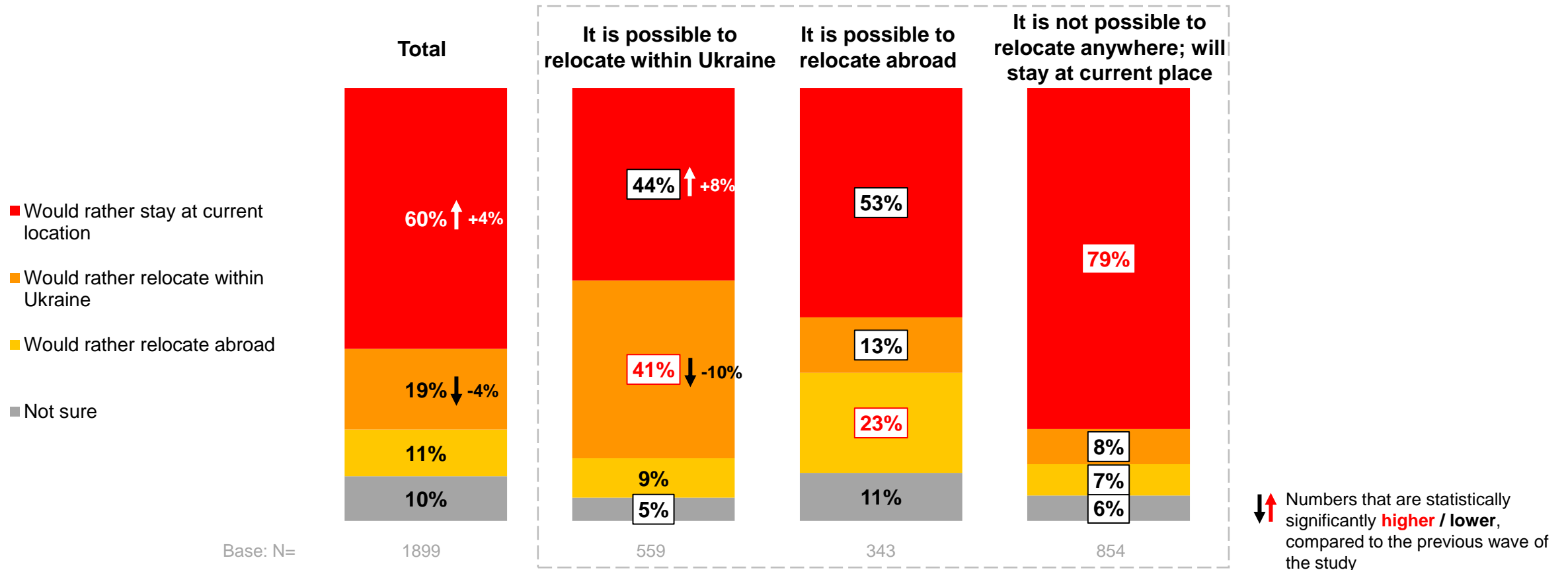
In case of further exacerbation, would you rather relocate further away, go abroad or stay where you are now?

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


RELOCATION IN CASE OF AGGRAVATION. WISHES

by opportunity to relocate

Among those who do not have the opportunity to relocate, 79% want to stay at their place. Among those who have the opportunity to migrate abroad, half (53%) want to stay at their place and 23% want to relocate abroad (this is the largest share among the groups). Among those who have the opportunity to relocate only within Ukraine, there was an increase in the share of those who want to stay (from 36% to 44%) due to the decrease in the share of those who want to relocate within Ukraine (from 51% to 41%).



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

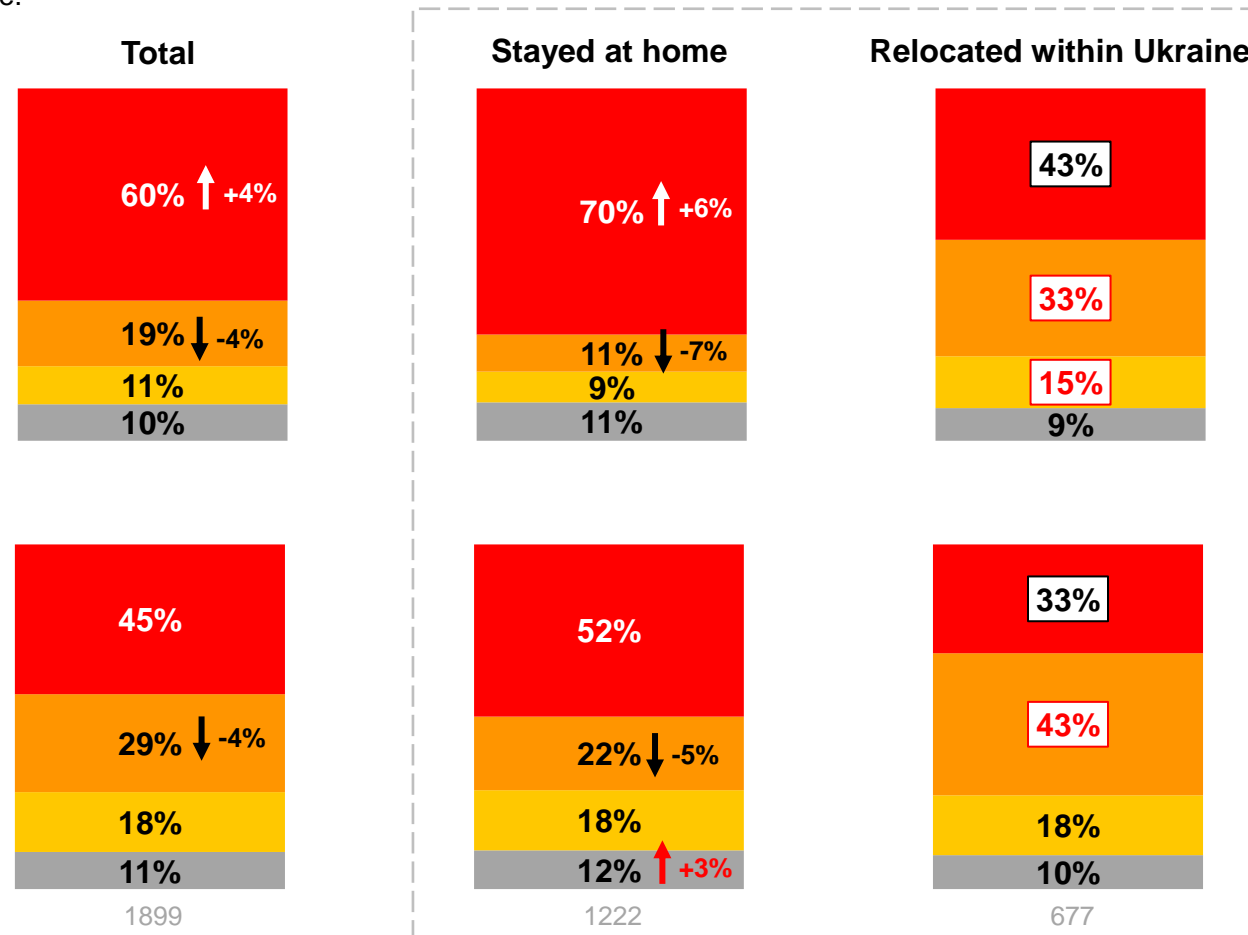
Among IDPs*, there are no dynamics in attitudes and opportunities to migrate, compared to the previous wave: they more often have both the intention and the opportunity to change their place of residence within Ukraine in the event of an aggravation of the situation. Whereas among those who stayed at home, there was a decrease in the share of those who have the opportunity and want to relocate within Ukraine in the event of an aggravation of the situation. In general, the vast majority of those who stayed at home want to stay at their current place of residence (70%), and 52% do not have the opportunity to relocate.

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=

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

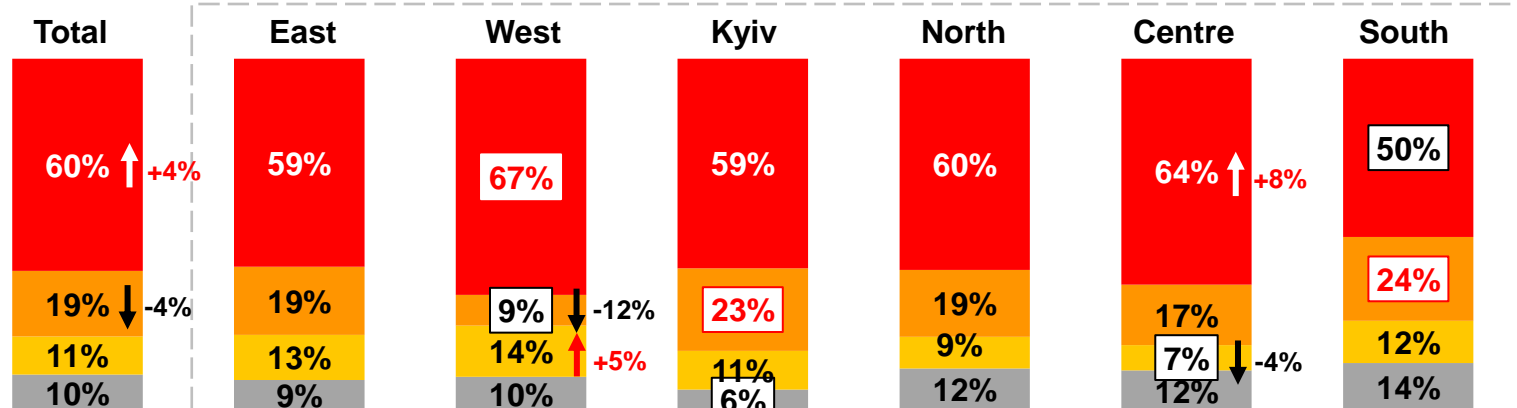
RELOCATION IN CASE OF AGGRAVATION. WISHES & OPPORTUNITIES

by region

There were no significant dynamics with regard to migration attitudes in the event of an aggravation of the situation by regions: a significant majority of the residents of the Western region still want to stay at their current place of residence (67%), a similar desire has also increased among the residents of the Central region, but the indicator is still at the level of residents of other regions, while among the residents of the South, the share of such people is significantly smaller (50%). As for the possibilities of relocation, there was a decrease in the share of those who can relocate within Ukraine among residents of the West (by 15 p.p.), and the share of those who hesitate to assess their own opportunities increased among residents of the North (+8 p.p.) and the South (+5 p.p.).

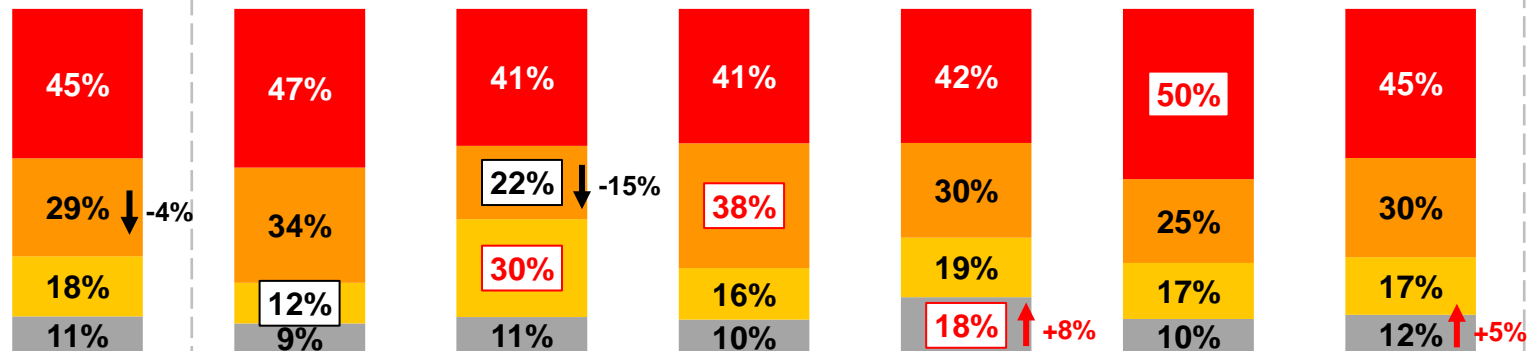
In case of aggravation of the situation **would rather...**

- 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=

1899

290

293

327

196

466

327

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

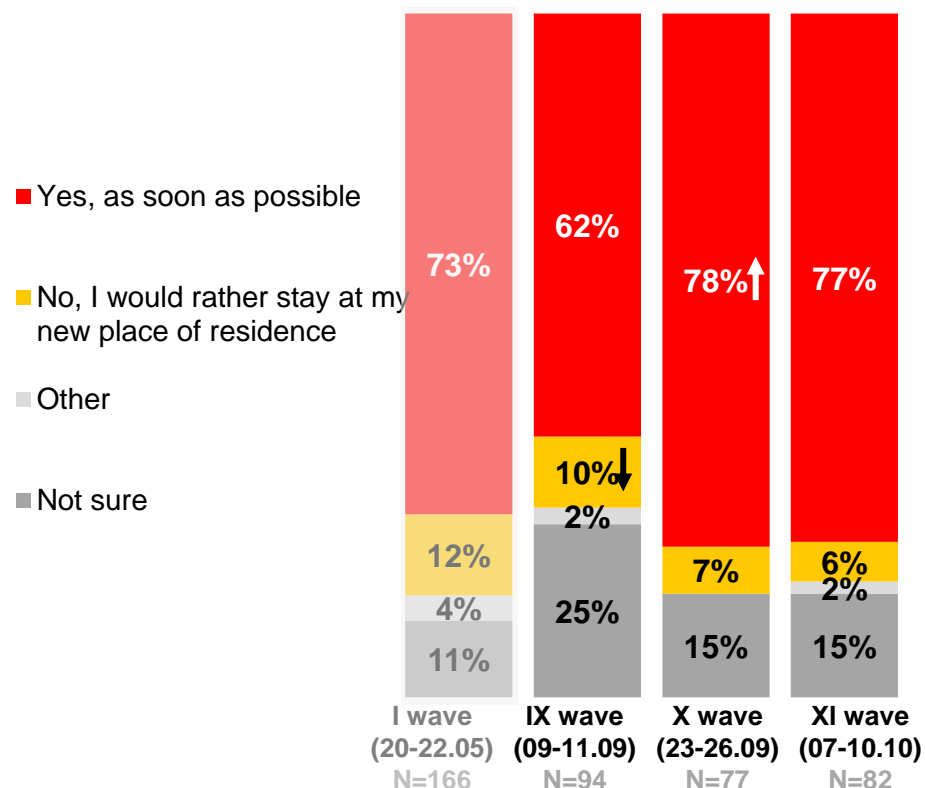


Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

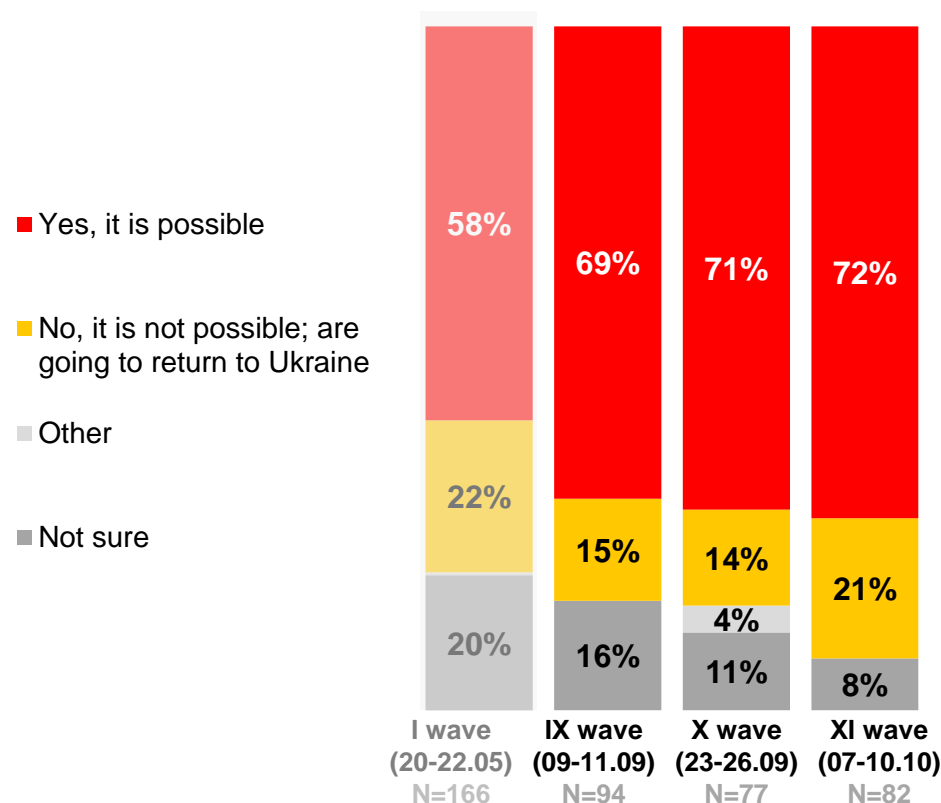
WISHES REGARDING COMING BACK FROM ABROAD. POSSIBILITY OF STAYING THERE

There are no significant changes in the eleventh wave of the study compared to the previous wave: the vast majority (77%) of respondents who are currently abroad want to return at the first opportunity, while 72% 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?

DRIVERS OF RETURNING TO UKRAINE

The most popular drivers of returning home among external migrants are a safe situation in the settlement (a constant factor over the last three waves) and the desire to return to a normal life.

	VIII wave (25-28.08) N=79	IX wave (09-11.09) N=94	X wave (23-26.09) N=77	XI wave (07-10.10) N=82
Safety of my locality	58% ↓	58%	56%	65%
Return home (to normal life)	50%	42%	40%	49%
Availability of housing in Ukraine	37%	29%	32%	40%
Love for Ukraine	32%	41%	45%	38%
Willingness to live and grow in Ukraine	33%	31%	38%	37%
Availability of paid work in Ukraine	47%	32%	40%	32%
Availability of development prospects in Ukraine	30%	27%	21%	32%
Reunion with my family	27%	28%	35%	26%
Better access to health care in Ukraine	20%	23%	6% ↓	25% ↑
Lower cost of living in Ukraine	16% ↓	23%	14%	21%
Resumption of business in Ukraine	18%	24%	15%	15%
Better access to school education in Ukraine*	9%	7%	9%	9%
Better access to high education in Ukraine*	6%	5%	5%	8%

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

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

What circumstances would encourage you to return to Ukraine?


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

BARRIERS TO RETURNING TO UKRAINE

As for the main barriers to returning to Ukraine, the situation remains without significant changes in the current wave. The main barrier to returning to Ukraine is the lack of conditions for a safe life (71%).

	VIII wave (25-28.08) N=79	IX wave (09-11.09) N=94	X wave (23-26.09) N=77	XI wave (07-10.10) N=82
Lack of conditions for a safe life in Ukraine	66%	62%	81% ↑	71%
Absence of a paid job in Ukraine	37%	29%	30%	30%
Absence / loss of residence in Ukraine	17%	19%	19%	20%
Better living conditions in the country where I currently am	28%	20%	20%	17%
Availability of residence in the country where I currently am	5%	13%	10%	12%
Inability to go abroad again (if I return)	13%	7%	13%	11%
Lack of access to quality healthcare in Ukraine	9%	4%	6%	10%
Availability of development prospects abroad	15%	8%	9%	9%
Having a paid job in the country where I currently am	16%	12%	12%	8%
Lack of access to quality education in Ukraine	6%	4%	6%	7%

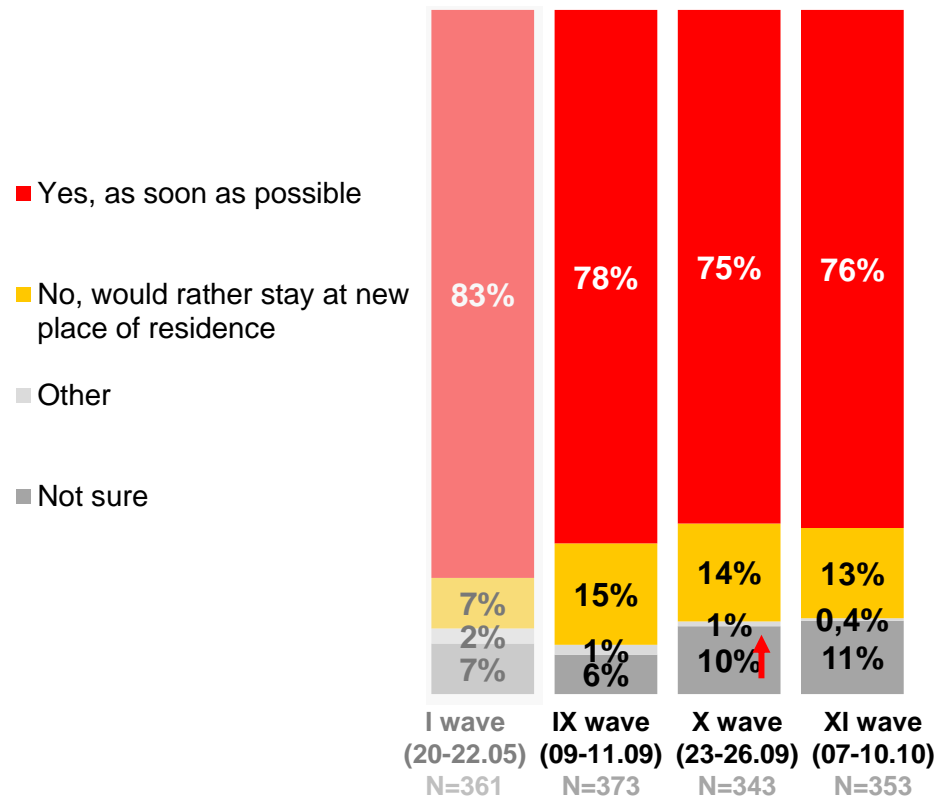
Base: respondents who relocated abroad and have not come back yet
What circumstances are holding you back from returning home?

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

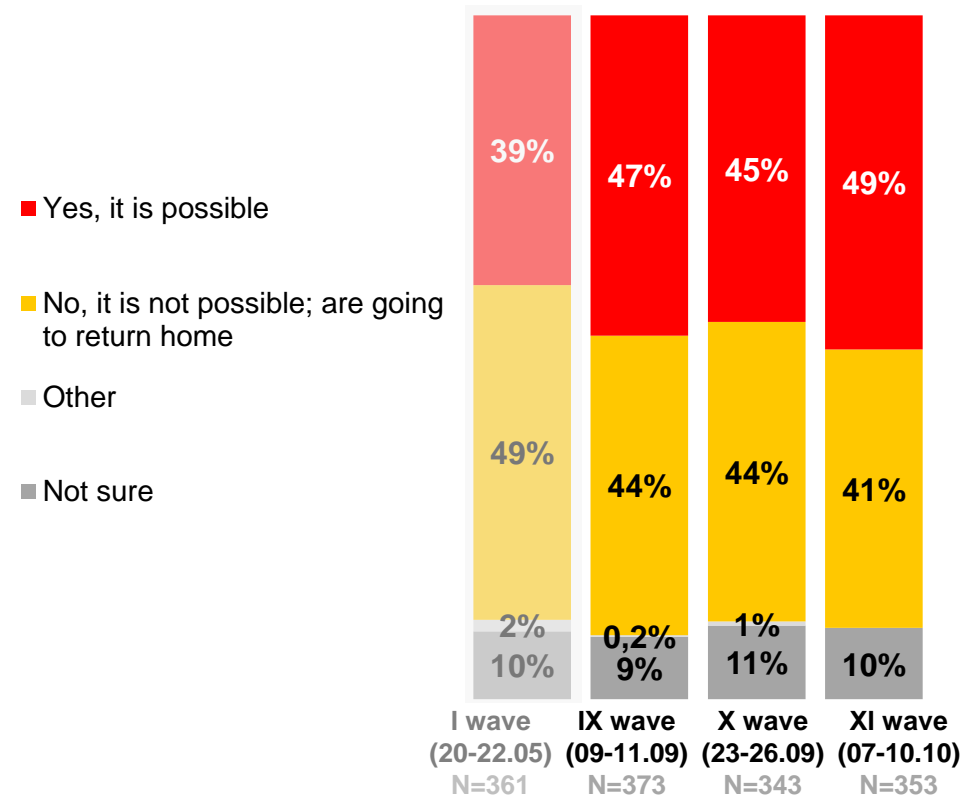
INTERNALLY DISPLACED PERSONS' WISHES REGARDING COMING BACK. POSSIBILITY OF STAYING WHERE THEY ARE

The distribution of answers regarding the desire of IDPs* to change their current place of residence remained without significant changes. Thus, 76% want to return home at the first opportunity, and 13% 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 - slightly less than half (49%) have such a possibility, and slightly less (41%) of the respondents 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

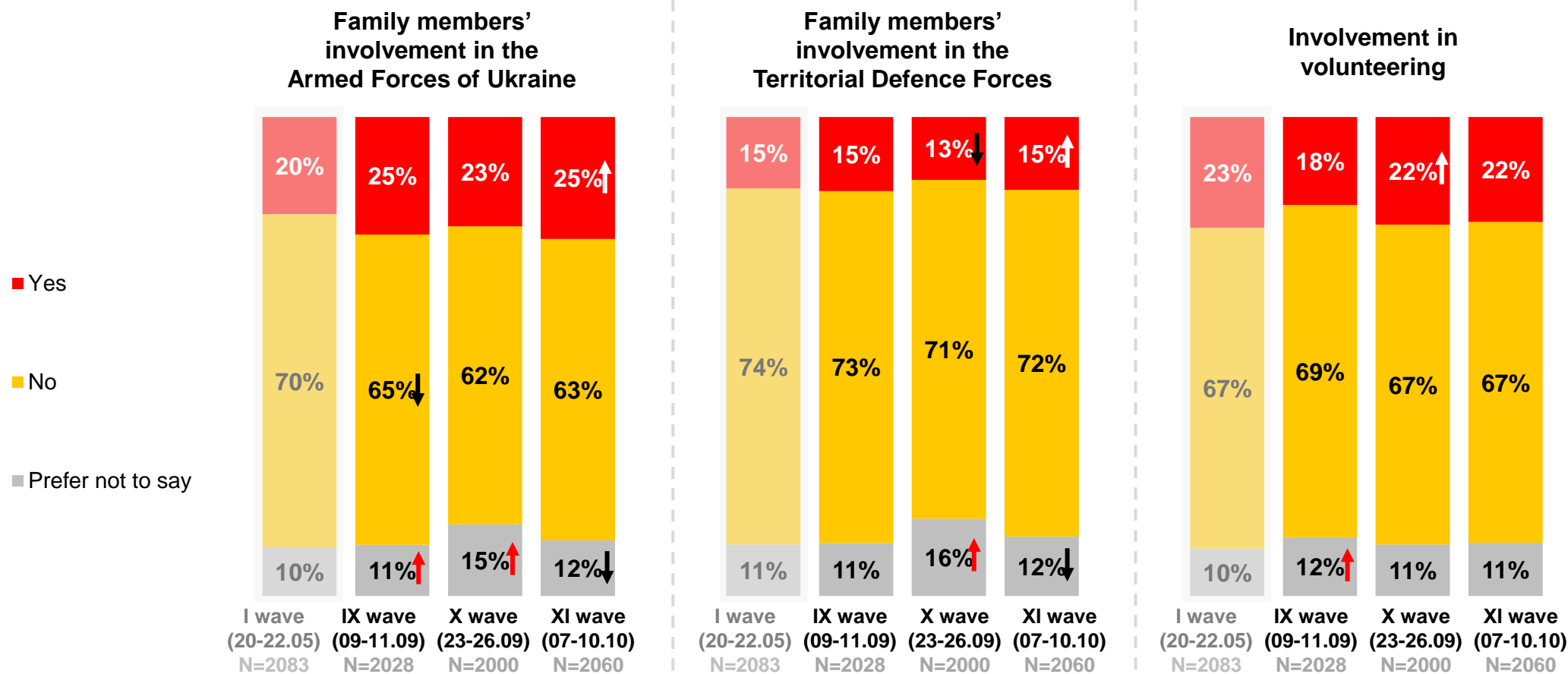
Do you want to return to your permanent place of residence when/if the hostilities there are over?

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

In the eleventh wave of the study, there was an increase in the share of people whose family members are involved in the Armed Forces of Ukraine (from 23% to 25%) and Territorial Defense Forces (from 13% to 15%), while involvement in volunteer activities is at the level of the previous wave (22%).



Base: all respondents

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

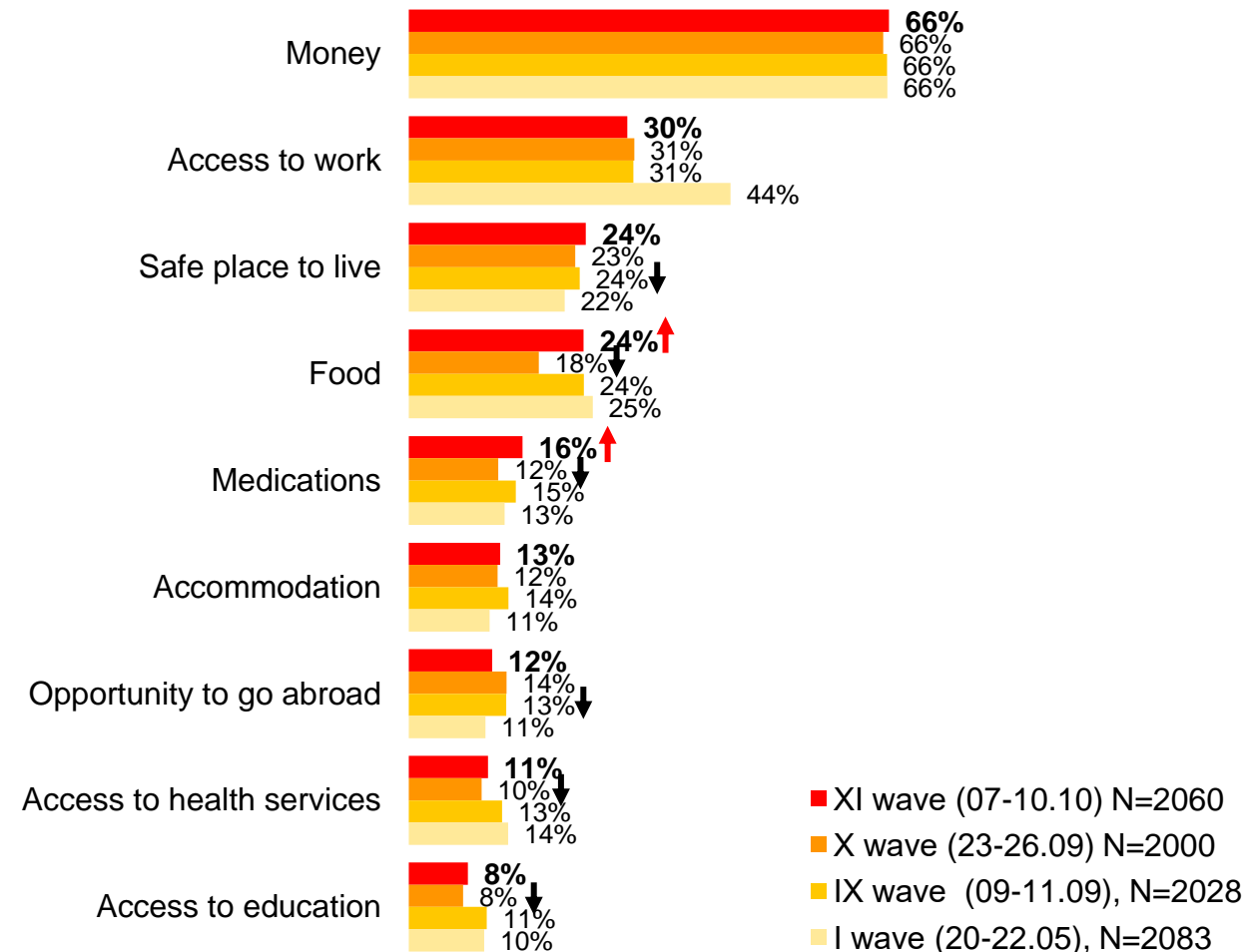
↑ Numbers that are statistically significantly **higher** /
 ↓ **lower**, compared to the previous wave of the study

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

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

THINGS THAT ARE NEEDED MOST

Money still remains the greatest need for 66% of respondents and their family members.



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

FAMILIES' NEEDS

by migration status


In the current wave, there was an increase in the need for money among internal and external migrants. Also, there was an increase in the need for food among those who stayed at home and internal migrants, and in the need for medicine among those who stayed at home and external migrants. Among external migrants, the share of those who declare a need for medical care has also increased.


	Total	Stayed at home*	Relocated within Ukraine	Relocated abroad
Money	66%	64%	71% ↑ +6%	64% ↑ +18%
Access to work	30%	25%	40%	27%
Safe place to live	24%	21%	31%	26%
Food	24% ↑ +6%	24% ↑ +6%	27% ↑ +7%	16%
Medications	16% ↑ +4%	15% ↑ +4%	17%	18% ↑ +12%
Accommodation	13%	6%	25%	13%
Opportunity to go abroad	12%	10%	15%	7%
Access to health services	11%	9%	13%	22% ↑ +10%
Access to education	8%	7%	10%	7%
	Base: N= 2060	1222	677	161

*"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

The need for food increased due to the growth of the indicator in the East, West, Center and South, and for medicines – due to the same process in the Centre. In the East, the need for work (the indicator decreased compared to the previous period), safety, food, and accommodation remains the most urgent after money.

	Total	East	West	Kyiv	North	Centre	South
Money	66%	68%	66% ↑ +9%	59% ↓ -8%	76%	64%	70%
Access to work	30%	39% ↓ -9%	27%	29%	35%	22%	35%
Safe place to live	24%	31%	16%	31% ↑ +13%	19%	19%	31%
Food	24% ↑ +6%	31% ↑ +8%	18% ↑ +7%	20%	19%	25% ↑ +7%	30% ↑ +10%
Medications	16% ↑ +4%	15%	12%	11%	8%	20% ↑ +7%	23%
Accommodation	13%	31%	11%	12%	5%	10%	7%
Opportunity to go abroad	12%	9%	9% ↓ -5%	15%	6%	12%	15%
Access to health services	11%	14%	9%	11%	9%	10%	13%
Access to education	8%	7%	9%	8%	6%	9%	9% ↑ +4%
Base: N=	2060	316	304	345	205	482	349

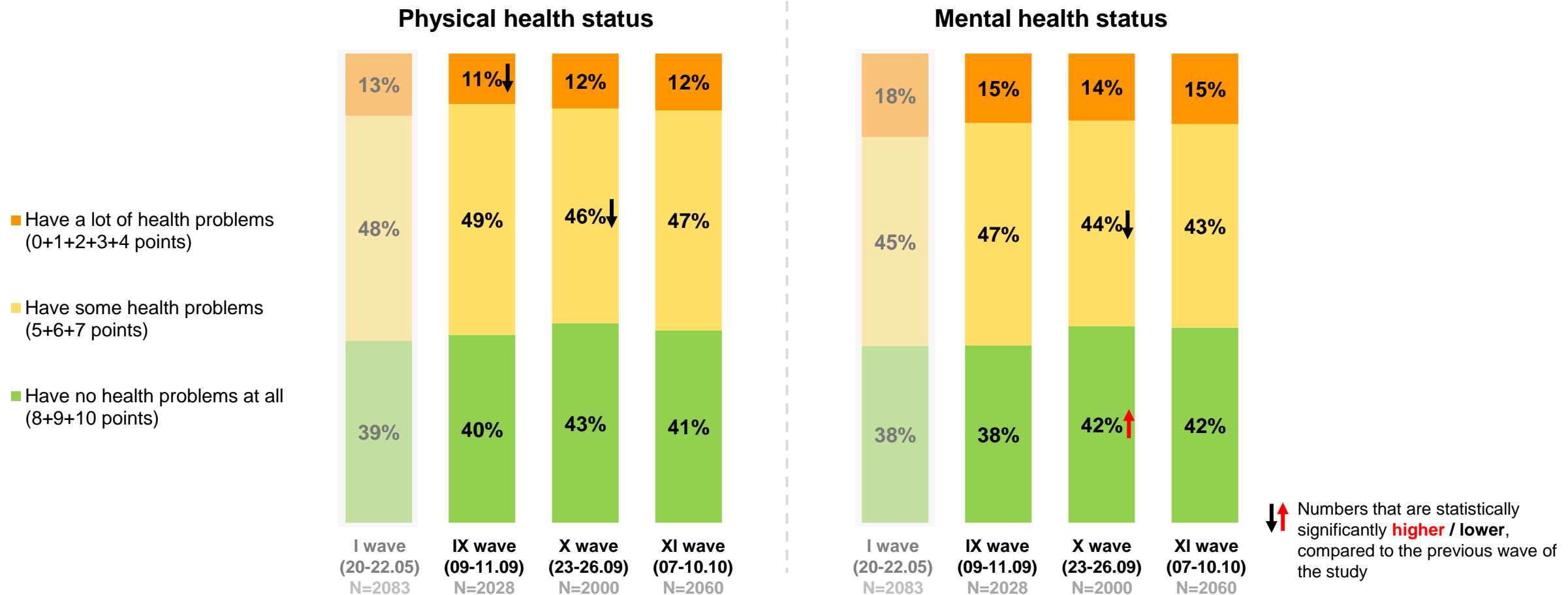
Base: all respondents
As of today, what do you or your family need most?

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

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

SUBJECTIVE ASSESSMENT OF HEALTH

In the eleventh wave, the distribution of subjective assessments of the state of physical and mental health remained unchanged. The largest share of respondents have some physical health problems (47%), while a slightly smaller share (41%) have no physical health problems. As for mental health, the share of those who have some problems with it and the share of those who do not have any problems are equal - 43% and 42%, respectively.



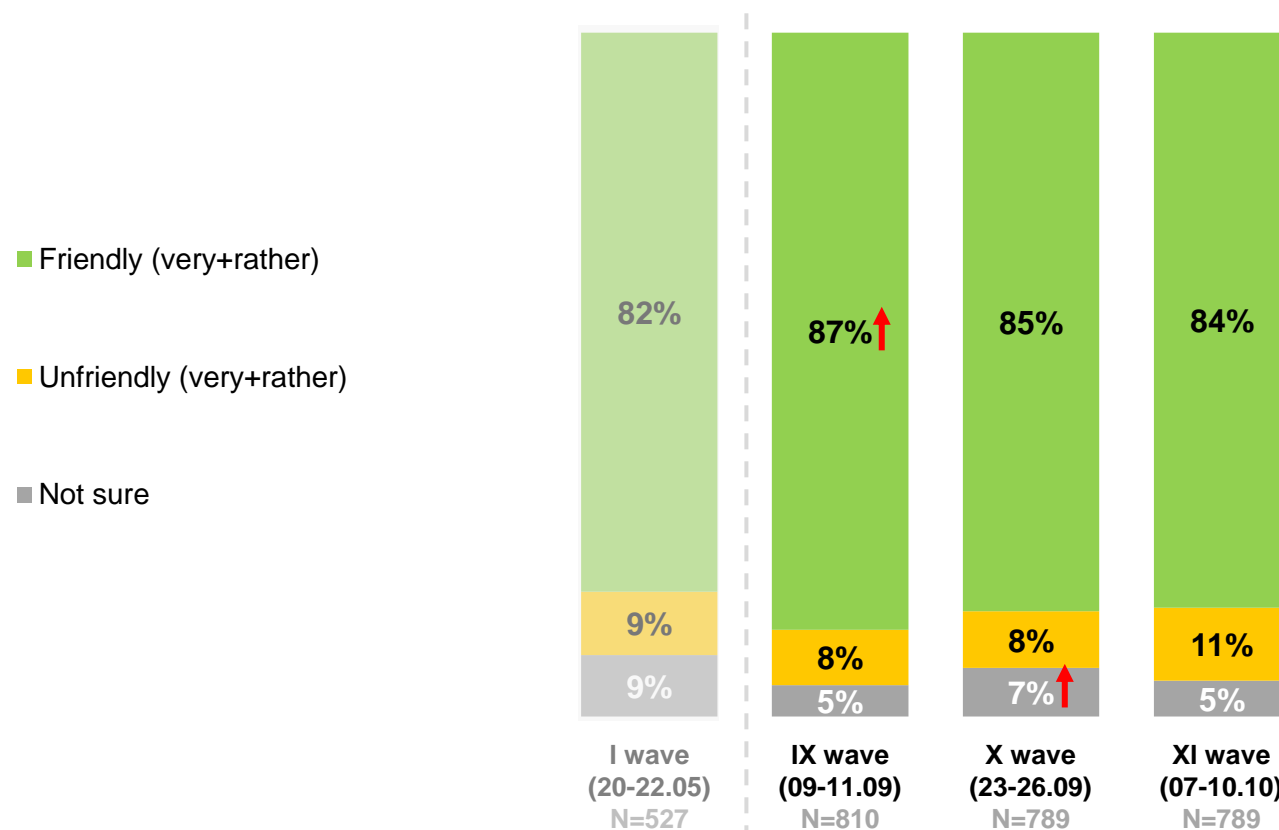
Base: all respondents

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: 84% of the audience that changed their place of residence evaluates the attitude of the local population towards them as rather or very friendly.



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

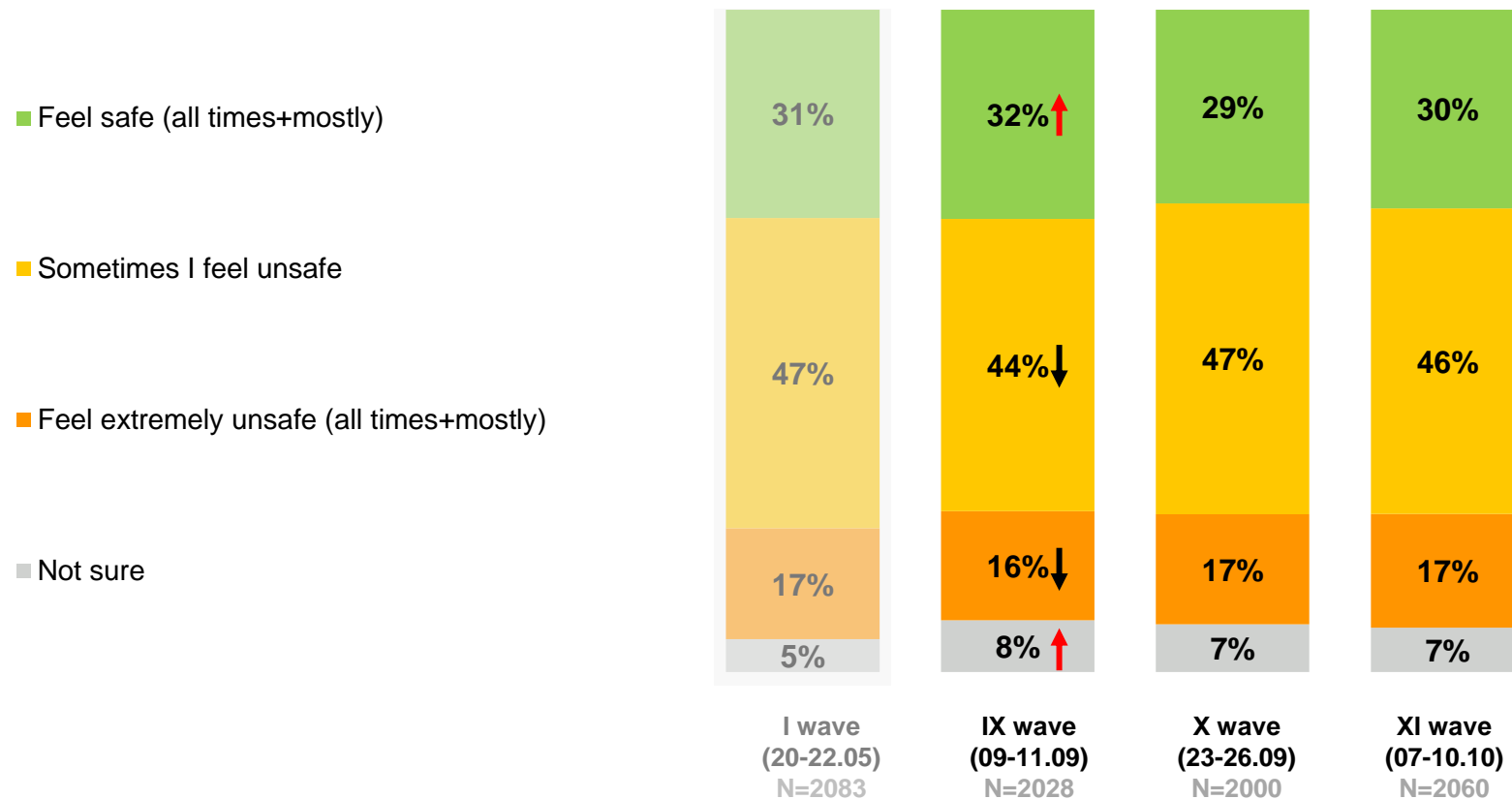
Base: respondents who changed their locations

*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

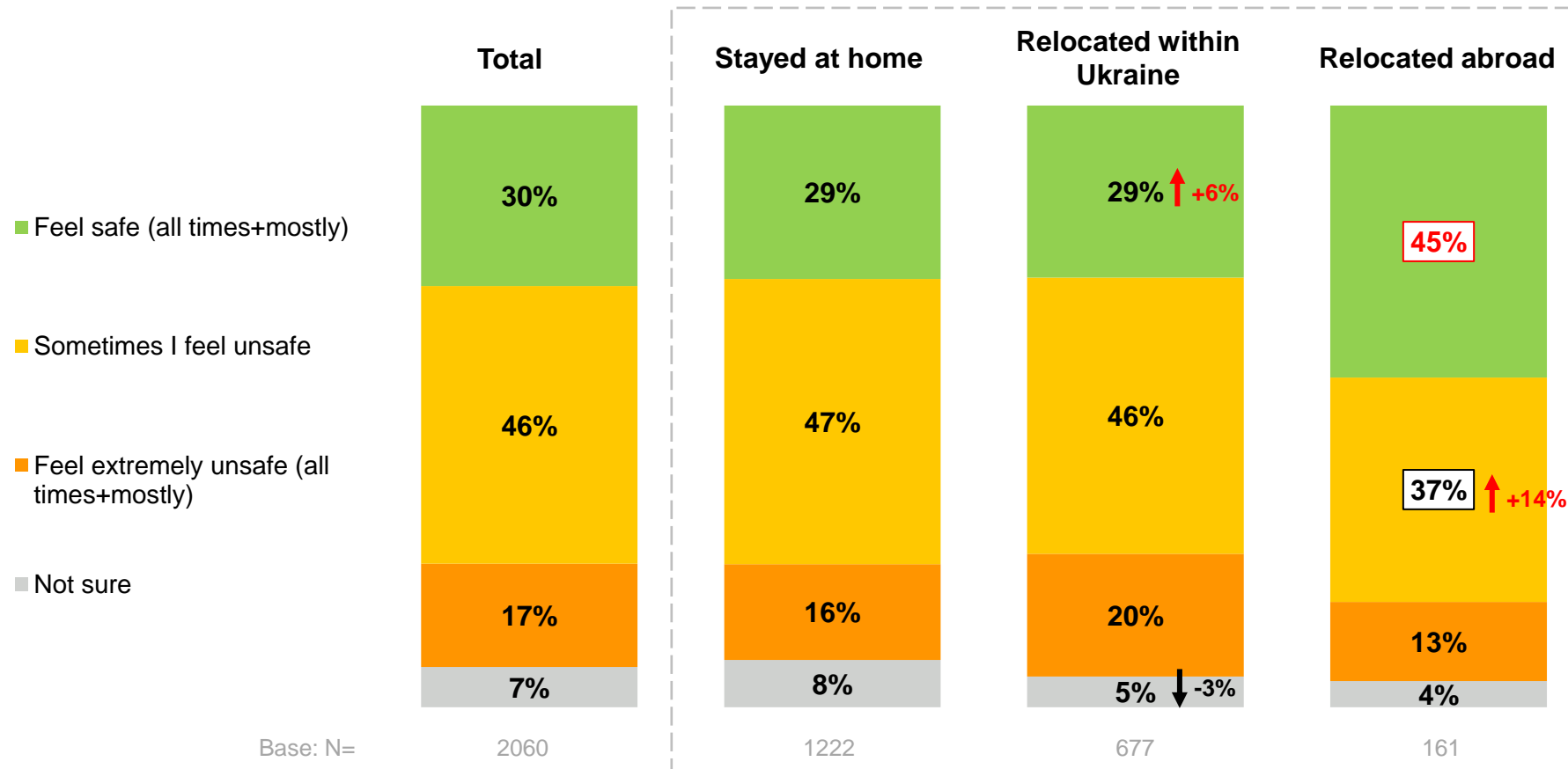
Compared to the previous wave, there are no significant dynamics in indicators of feeling of safety. The majority (46%) declare that they sometimes feel unsafe, almost a third (30%) – feel safe, and 17% declare that they feel unsafe all the time or most of the time.



PERCEIVED SAFETY

by migration status


Among external migrants, there was an increase in the share of those who sometimes feel unsafe. Whereas among the persons who were forced to migrate within Ukraine, there was an increase in the share of those who feel safe.




*IDPs - internally displaced persons

Base: all respondents

Which of the following statements best describes your current state?

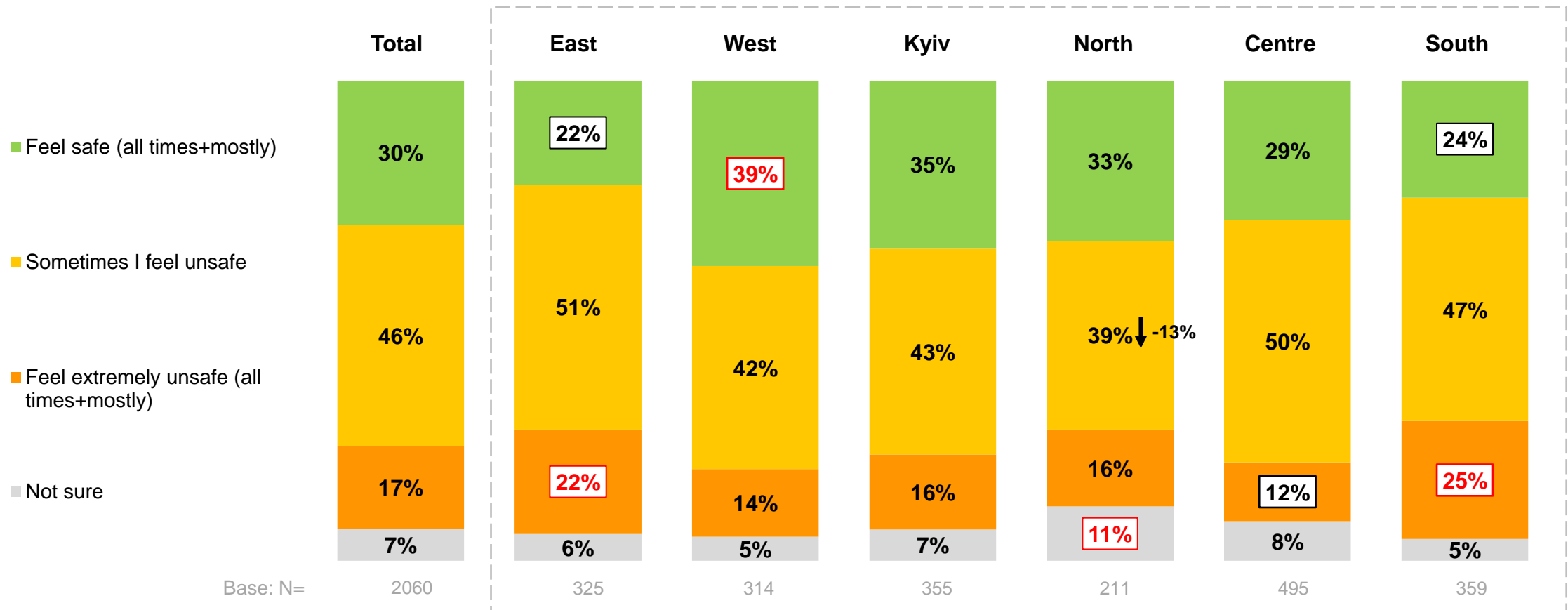
 Numbers that are statistically significantly **higher** / **lower** for the group, compared to the sample as a whole

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

PERCEIVED SAFETY


by region


There were no recorded significant regional differences in the feeling of safety. Residents of the West indicate that they feel safe more often than residents of other regions, but in general, residents of all regions mainly feel unsafe from time to time or most of the time.



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

by migration status

Compared to the previous wave, the share of those who stayed at home and currently live in a dormitory or communal apartment decreased (-5 p.p.); there are no any significant changes in other aspects

	Total	Stayed at home*	Relocated within Ukraine	Relocated abroad
In their own home	59%	76%	34%	35%
In rented accommodation	18%	11%	26%	35%
With other people (relatives / friends)	13%	9%	22%	9%
In a dormitory / communal apartment	4% ↓ -3%	3% ↓ -5%	6%	3%
With strangers / unfamiliar people	3%	1%	8%	8%
In a hotel / hostel	2%	0,4%	3%	7%
At school / kindergarten / mobile accommodation for refugees	1%	0,4%	0,4%	2%
Base: N=	2060	1222	677	161

*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?



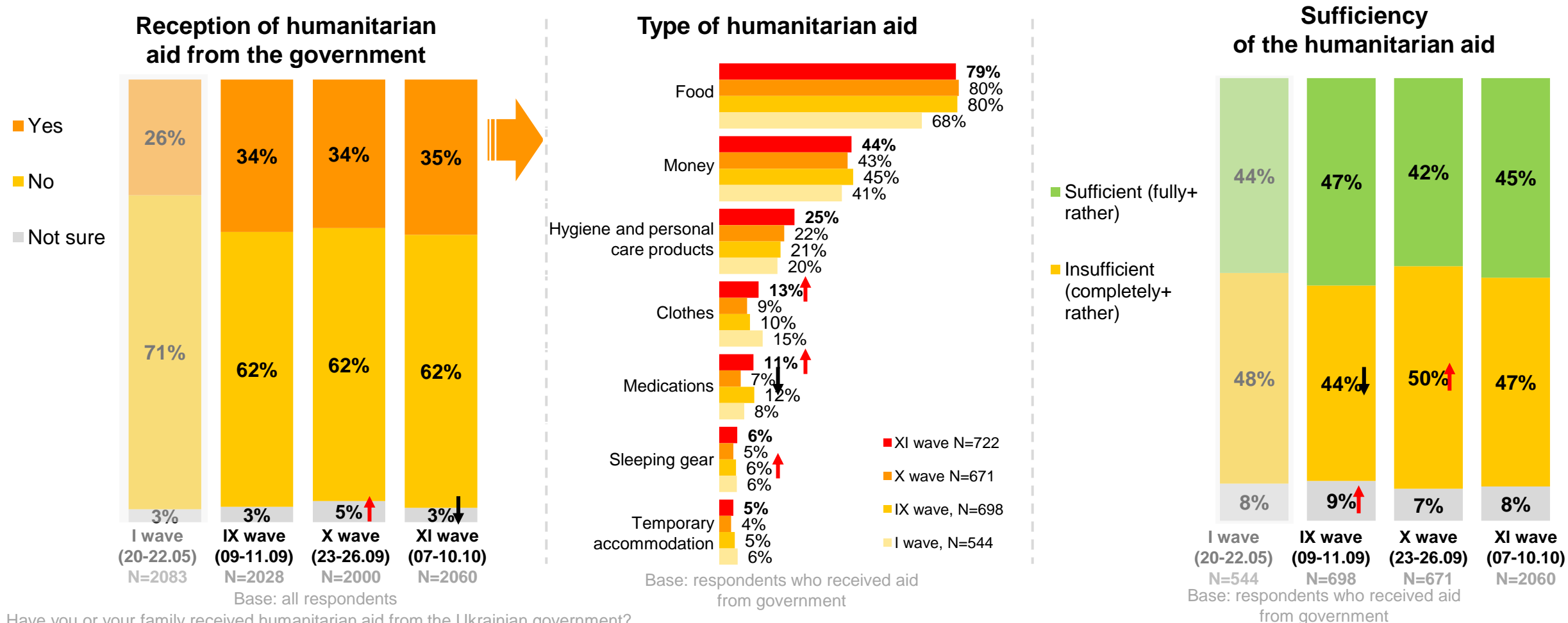
Numbers that are statistically significantly **higher** / **lower** for the group, compared to the sample as a whole





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

HUMANITARIAN AID FROM THE **UKRAINIAN** GOVERNMENT

The percentage of respondents who receive humanitarian aid from the Ukrainian state remains stable (at the level of 35%). The most popular form of aid is food (79%) and money (44%). 45% of recipients consider the received assistance as sufficient.



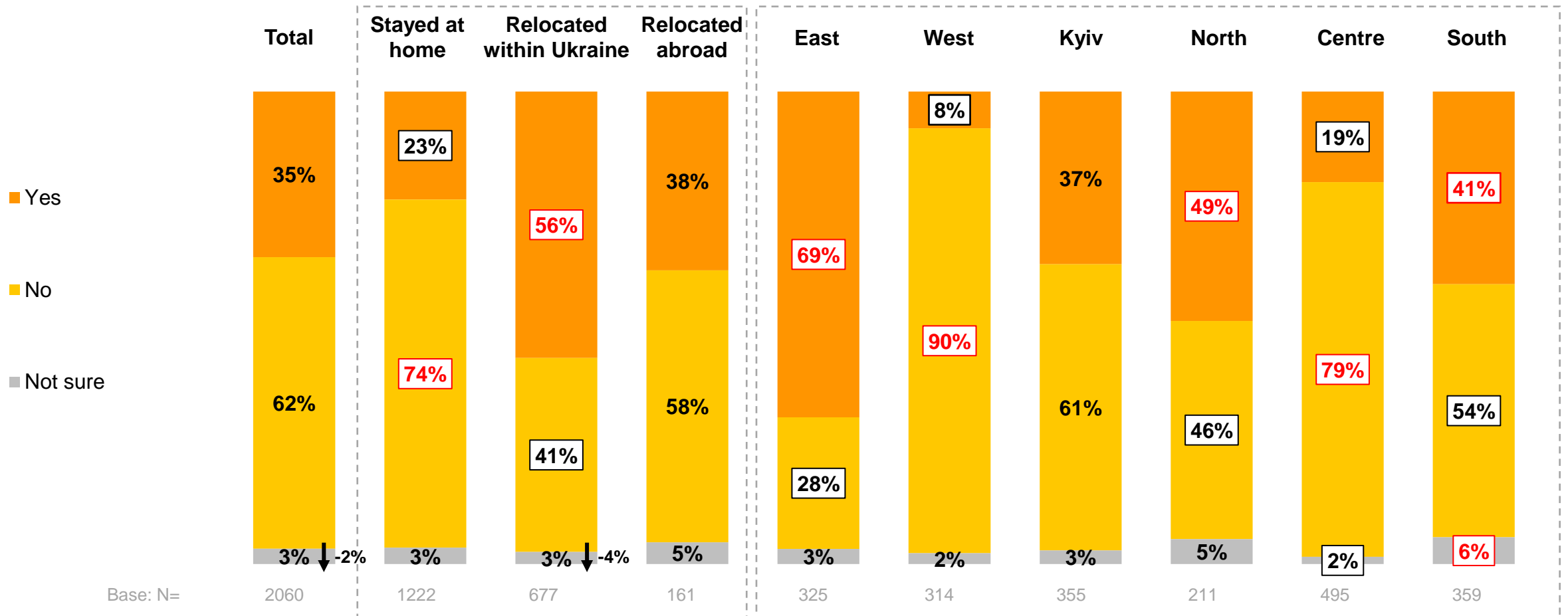
Have you or your family received humanitarian aid from the Ukrainian government?
 What kind of humanitarian aid did you or your family receive from the Ukrainian government?
 How would you assess the humanitarian aid provided to you or your family by the Ukrainian government?



 Numbers that are statistically significantly **higher** / **lower**, 32 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, residents from Eastern, Northern and Southern regions. The smallest number of recipients is among those who stayed at home, as well as among people from the Western and Central regions.



Base: all respondents

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

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

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

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

by migration status and region

Compared to the previous wave, there was an increase in the share of people who receive aid from the Ukrainian state in the form of clothes and medications among internal migrants.

	Total	Stayed at home	Relocated within Ukraine	Relocated abroad	East	West	Kyiv	North	Centre	South
Food	79%	81%	79%	71%	88%	60%	69%	82%	72%	82%
Money	44%	29%	56%	44%	45%	47%	48%	32%	37%	53%
Hygiene and personal care products	25%	15%	33%	23%	25%	27%	25%	30%	17%	27%
Clothes	13% ↑ +4%	5%	18% ↑ +6%	21%	14%	27%	15%	10%	8%	14%
Medications	11% ↑ +4%	7%	13% ↑ +5%	24%	5%	32%	12%	19%	13%	11%
Sleeping gear (bedding, pillows, mattresses, sleeping bags etc.)	6%	3% ↑ +3%	7%	14%	7%	7%	3%	4%	5%	10%
Temporary accommodation	5%	0,4%	7%	10%	5%	6%	1%	2%	3%	9%
Base: N=	722	280	382	61	224	24*	130	102	95	146

* 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?

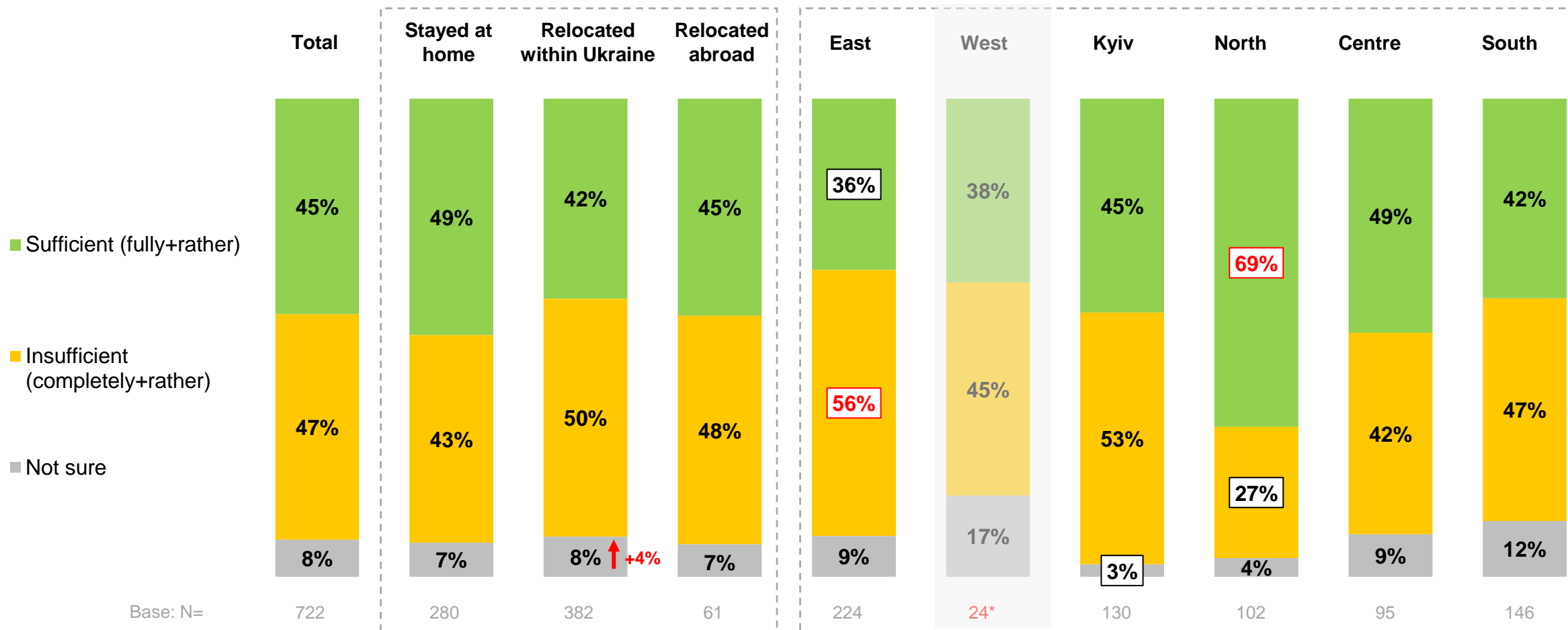
↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

□ 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

People from the North of the country are the most satisfied with humanitarian aid. In general, the majority (56%) of the residents of the East assess the humanitarian aid that they received from the Ukrainian state as 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?

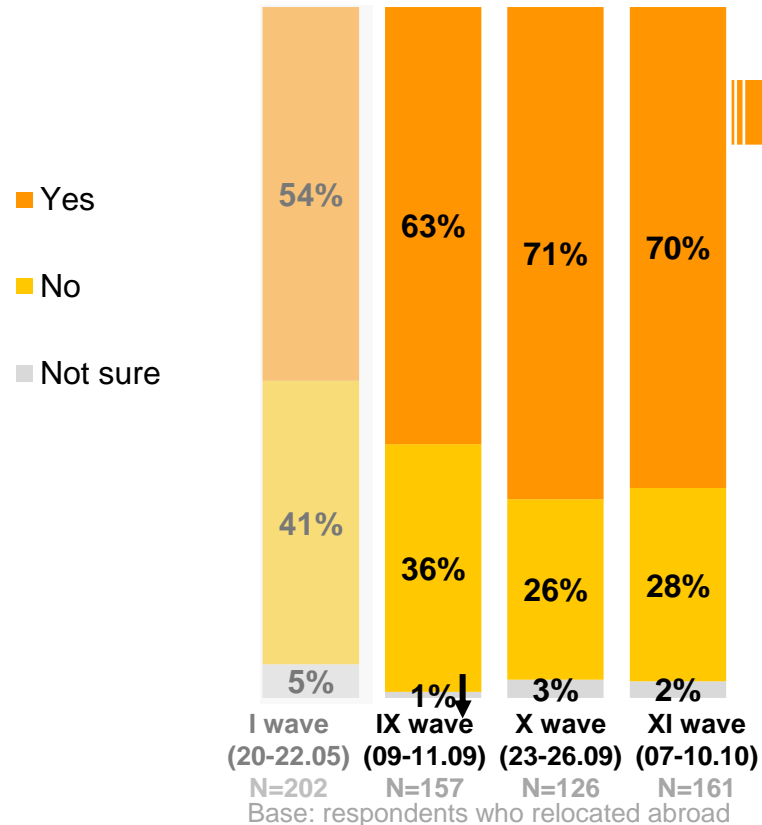
↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

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

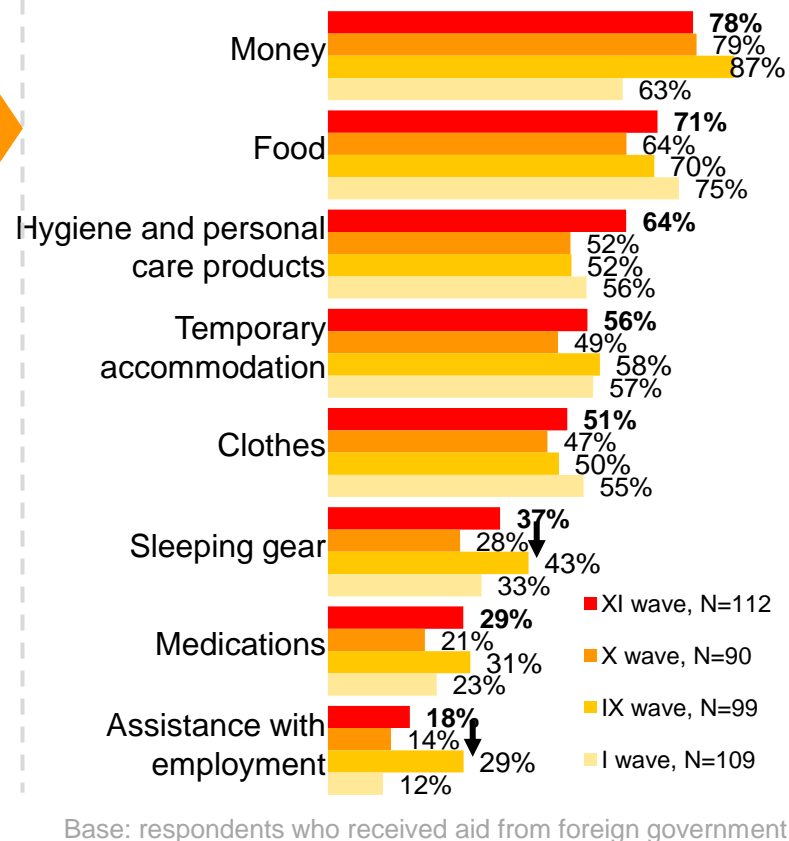
HUMANITARIAN AID FROM THE **FOREIGN** GOVERNMENT

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 without significant changes and is at 70%. Among those who received it, 79% evaluated it as sufficient. The most common forms of assistance are money (78%), food (71%), hygiene products (64%), temporary housing (56%) and clothes (51%).

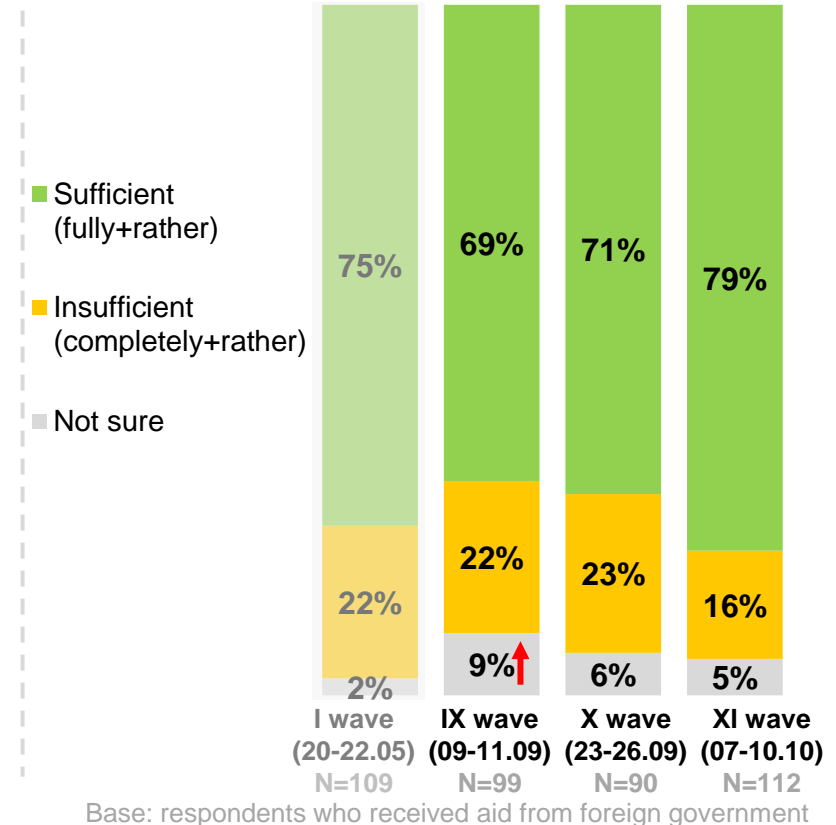
Reception of humanitarian aid from the government



Type of humanitarian aid



Sufficiency of the humanitarian aid



Have you or your family received humanitarian or financial aid from the state of the country you currently reside in? What humanitarian aid have you or your family received from the state where you currently reside in? How would you assess the aid provided to you or your family by the local government of the country you currently reside in?

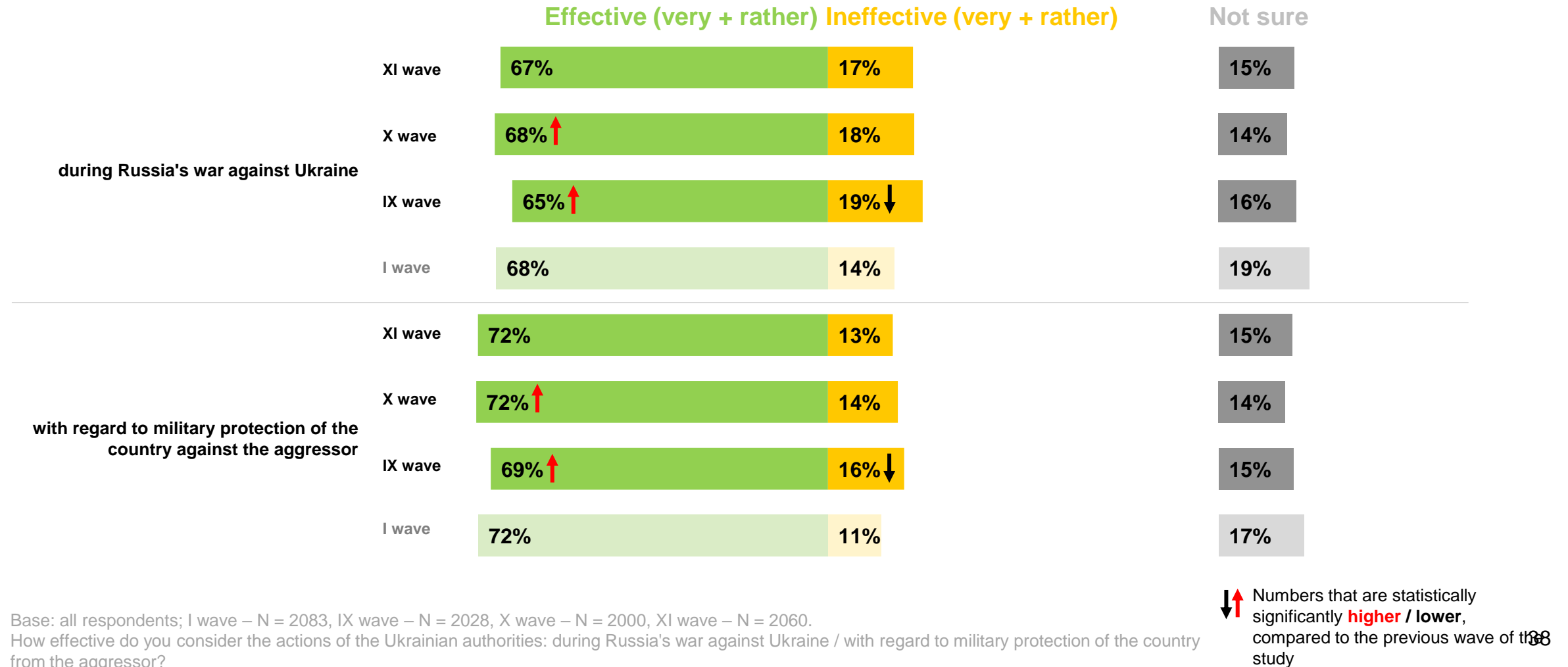
↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

PERCEPTION OF THE FULL-SCALE WAR WITH RUSSIA



EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES...

In the eleventh wave, indicators of the effectiveness of the Ukrainian authorities' actions since the beginning of the war in general and in the field of military protection in particular stopped growing and remain at a high level: 67-72%.

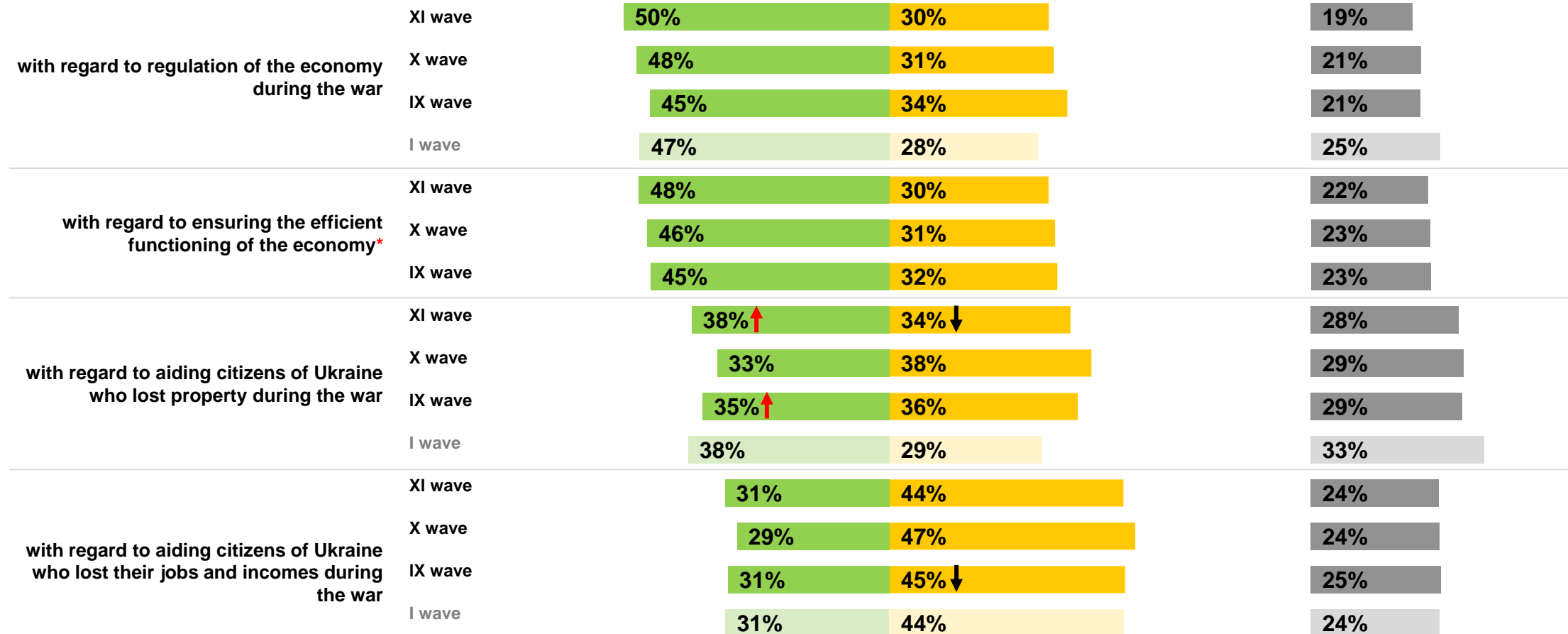


EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES...

The assessment of the actions of the Ukrainian authorities in the spheres of the economy has not changed significantly in the current wave: half (48-50%) of respondents consider such actions to be effective. The assessment of the effectiveness of the authorities' actions with regard to aiding those who lost their jobs also has not changed: it is 31%. In turn, when it comes to aiding those who have lost property, this indicator has increased and is currently at the level of the first wave - 38%. In particular, it has increased among people from the East, South and North.

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

Not sure



Base all respondents; I wave – N = 2083, IX wave – N = 2028, X wave – N = 2000, XI wave – N = 2060.

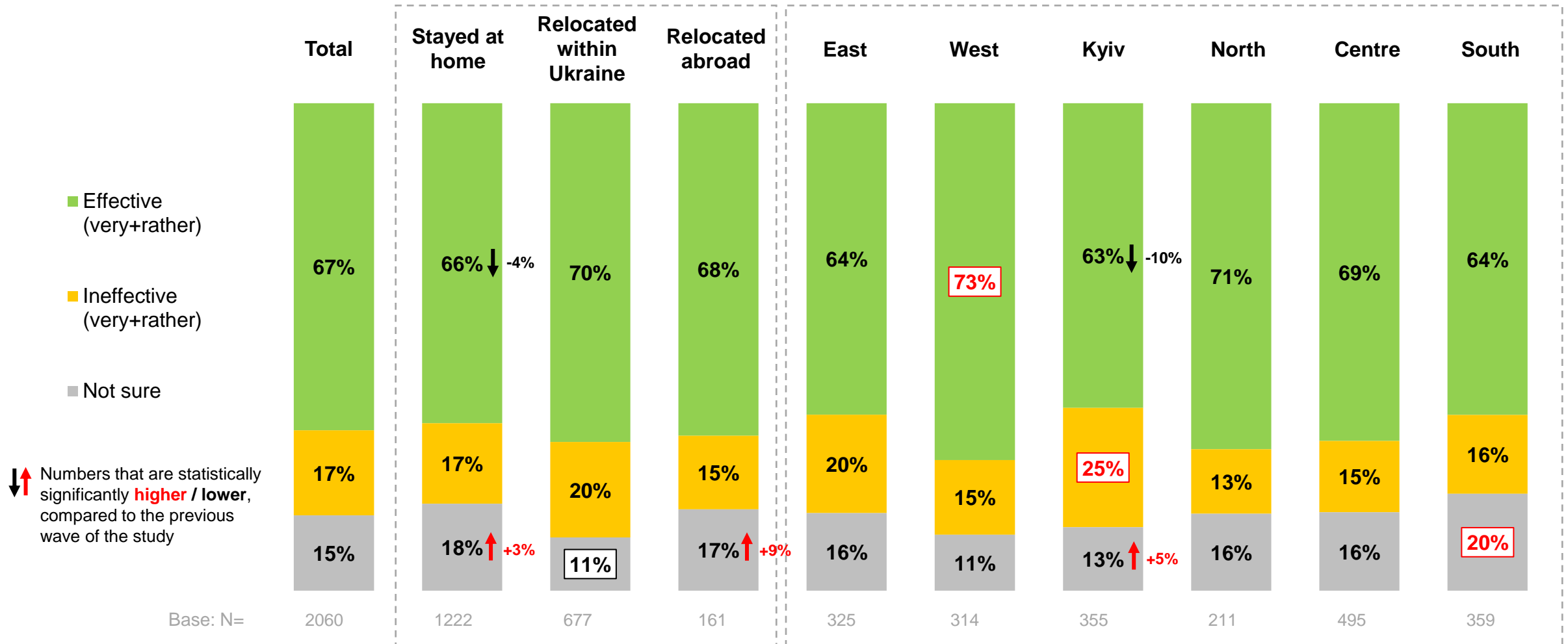
How effective do you consider the actions of the Ukrainian authorities: with regard to regulation of the economy during the war / with regard to ensuring the efficient functioning of the economy* / with regard to aiding citizens of Ukraine who lost property during the war / with regard to aiding citizens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



EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

during Russia's war against Ukraine

by age



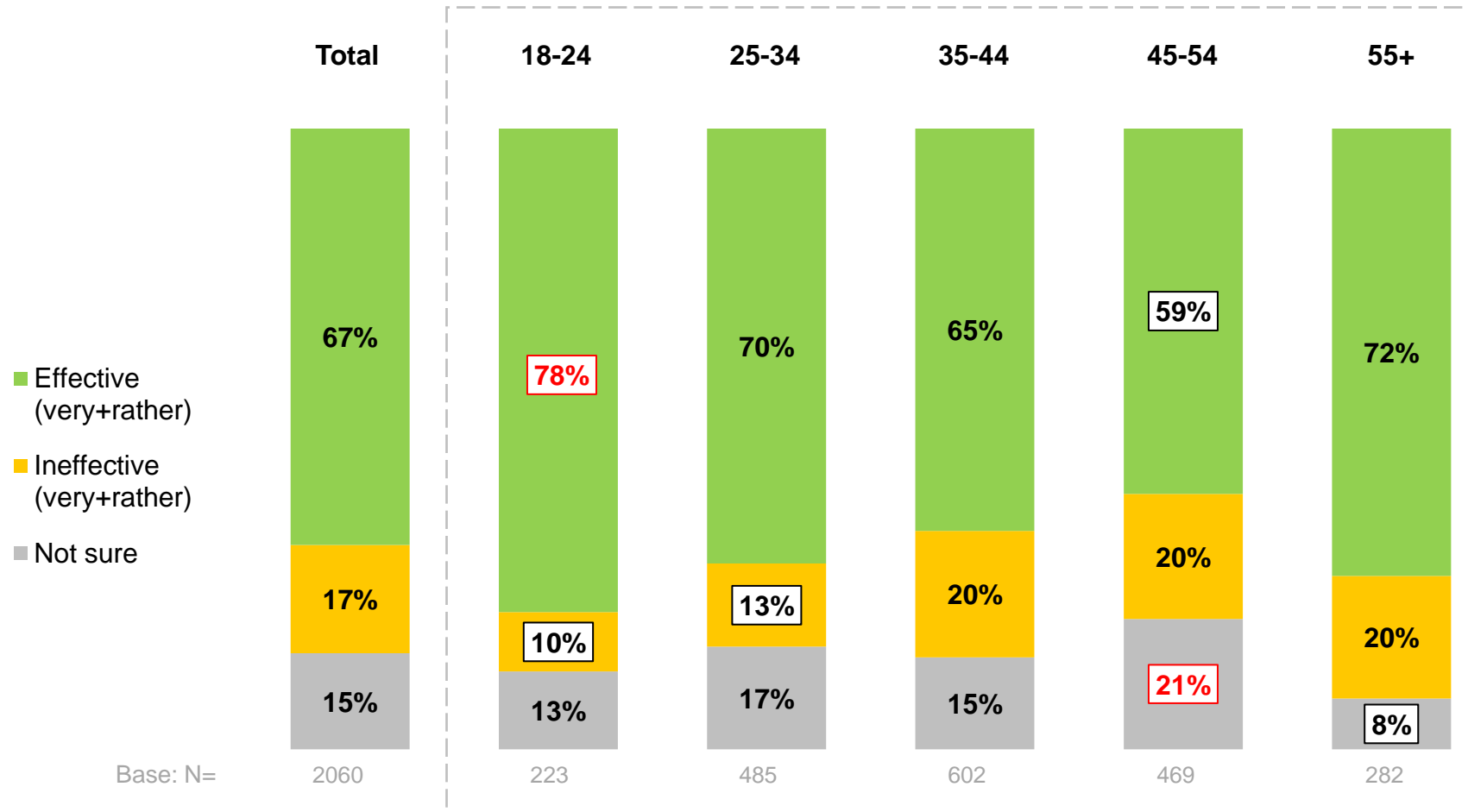
Centre for
Economic
Recovery



Advanter



MOVING FORWARD
TOGETHER



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

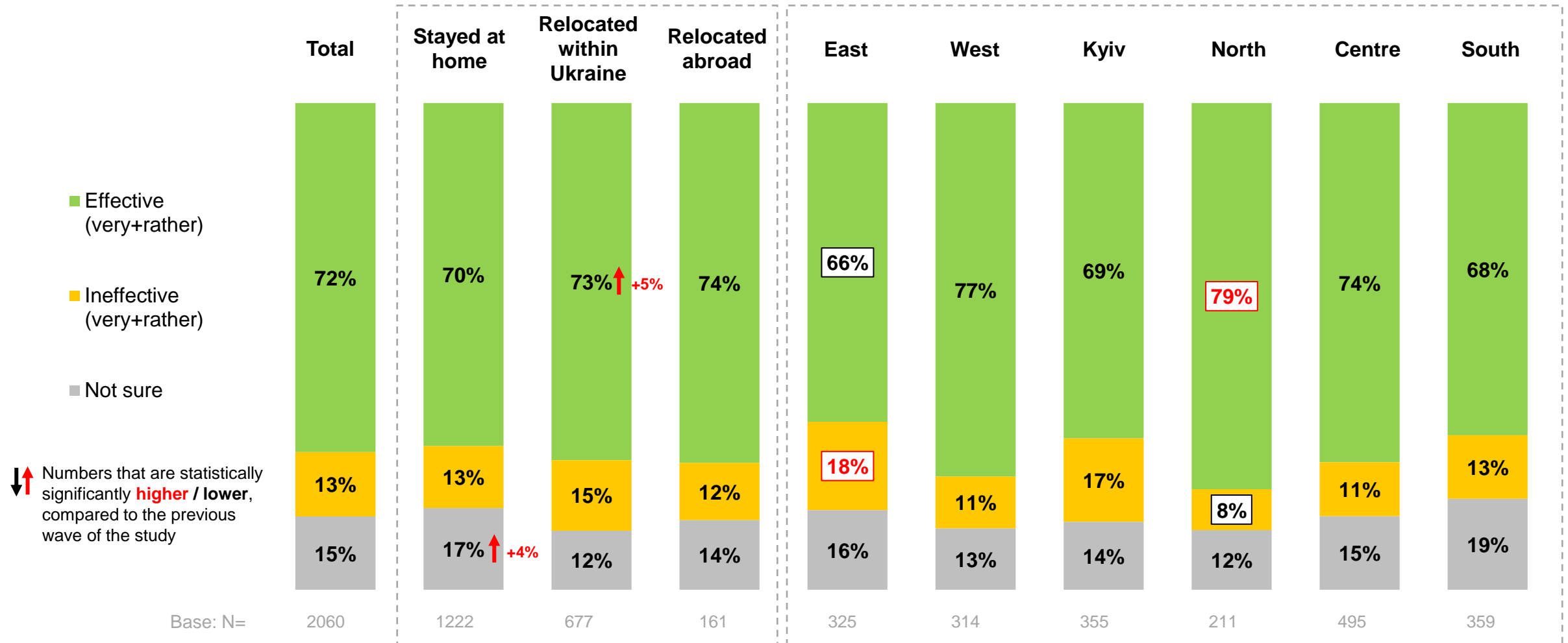
□ Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

Base: all respondents

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

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

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

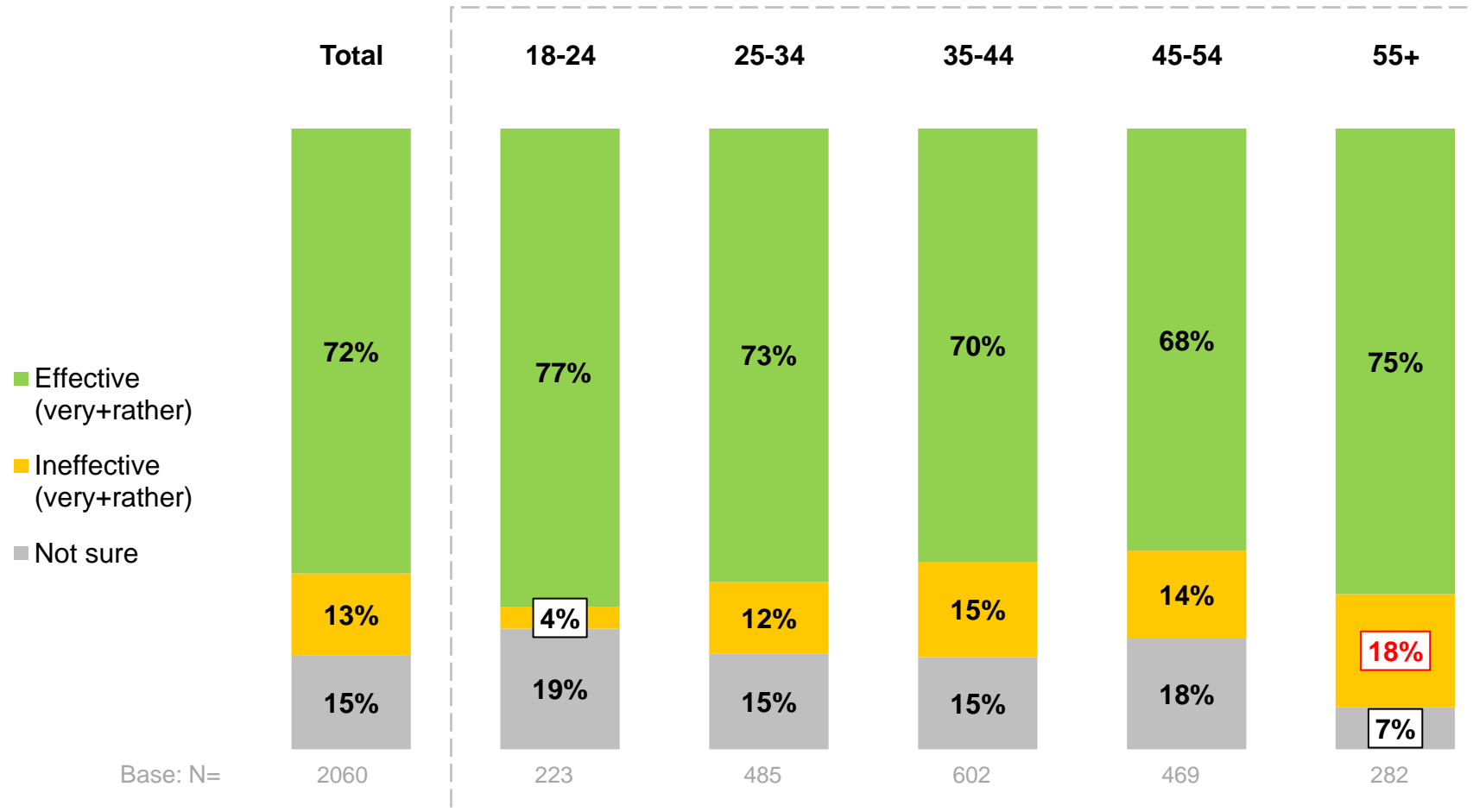


Base: all respondents
How effective do you consider the actions of the Ukrainian authorities with regard to military protection of the country from the aggressor?

Numbers that are statistically significantly **higher** / **lower** a group, 42 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?

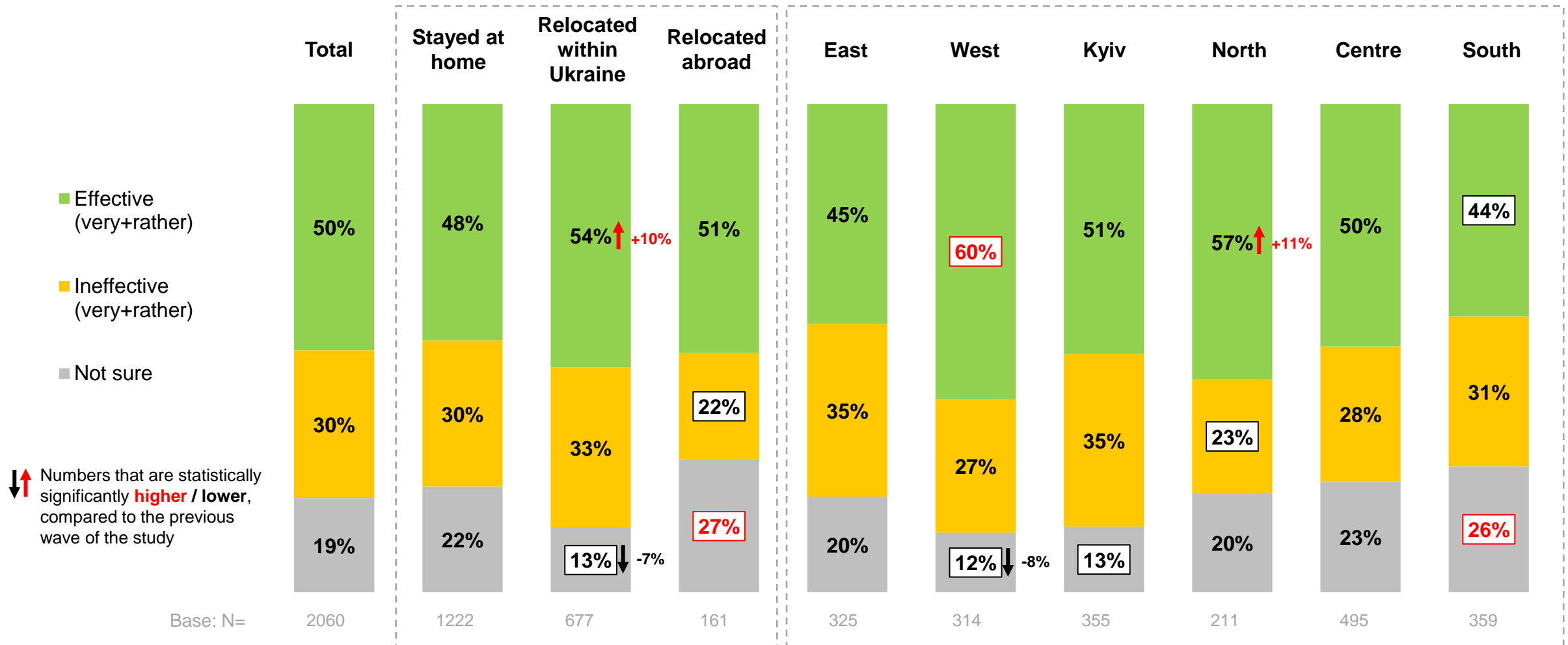
↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

□ 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, 44 compared to the sample as a whole

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

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

by age



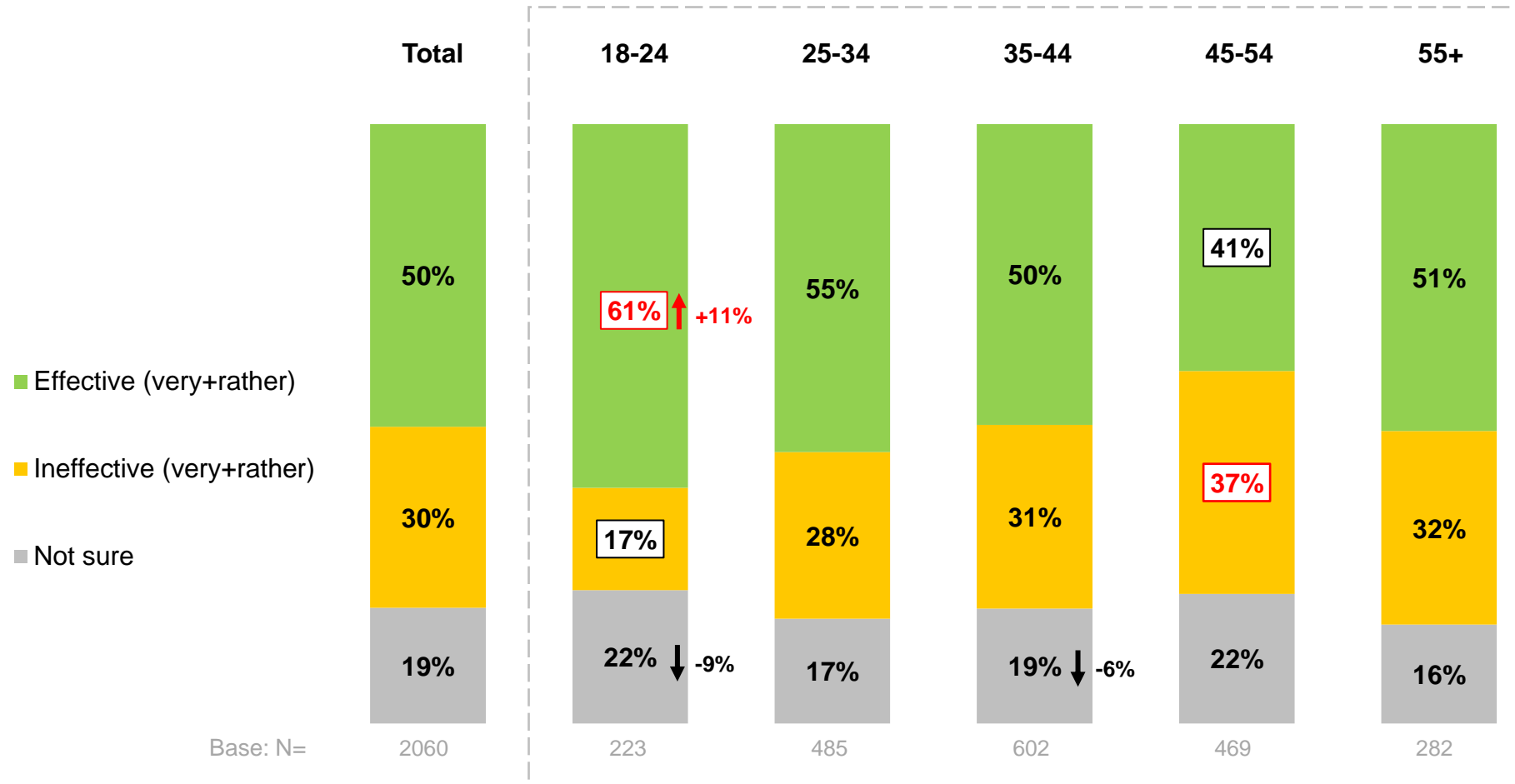
Centre for
Economic
Recovery



Advanter



MOVING FORWARD
TOGETHER



Base: N=

2060

223

485

602

469

282

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

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

Base: all respondents

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

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

with regard to **ensuring the efficient functioning of the economy**
by migration status and region



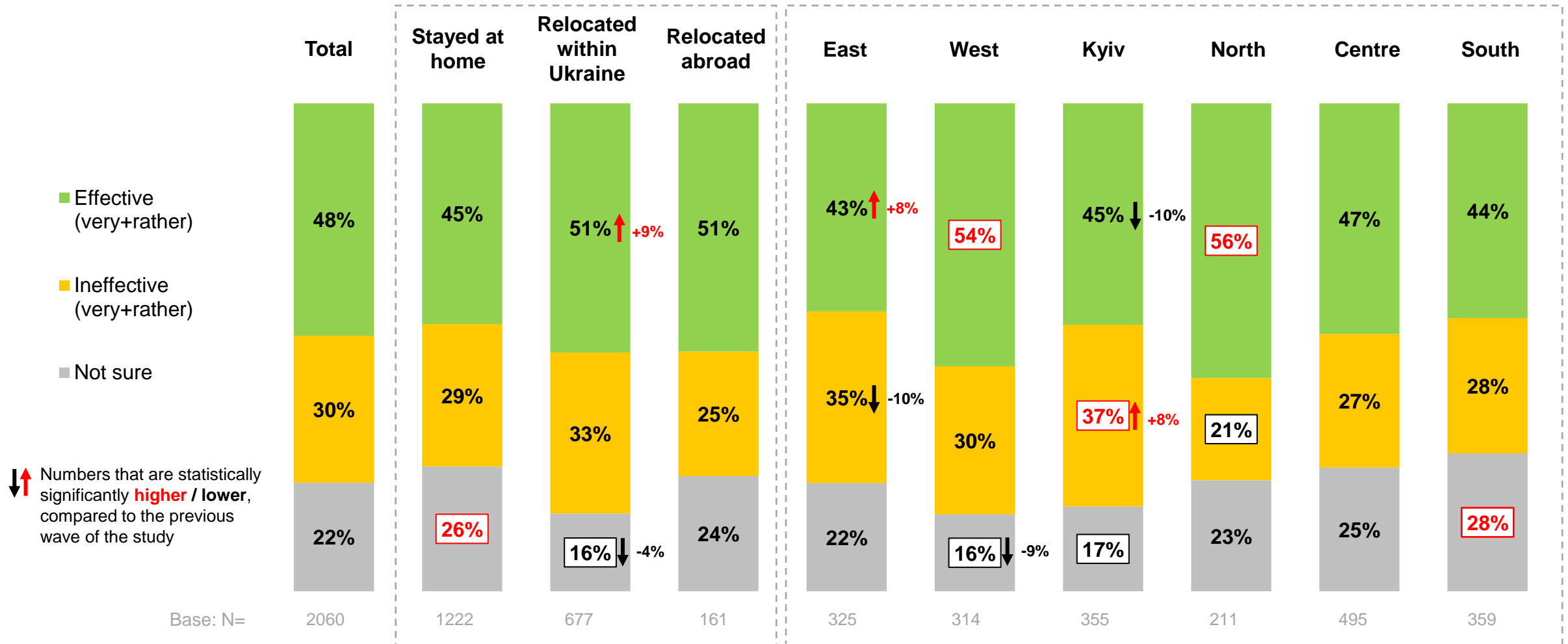
Centre for
Economic
Recovery



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** for a group, 46 compared to the sample as a whole

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

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



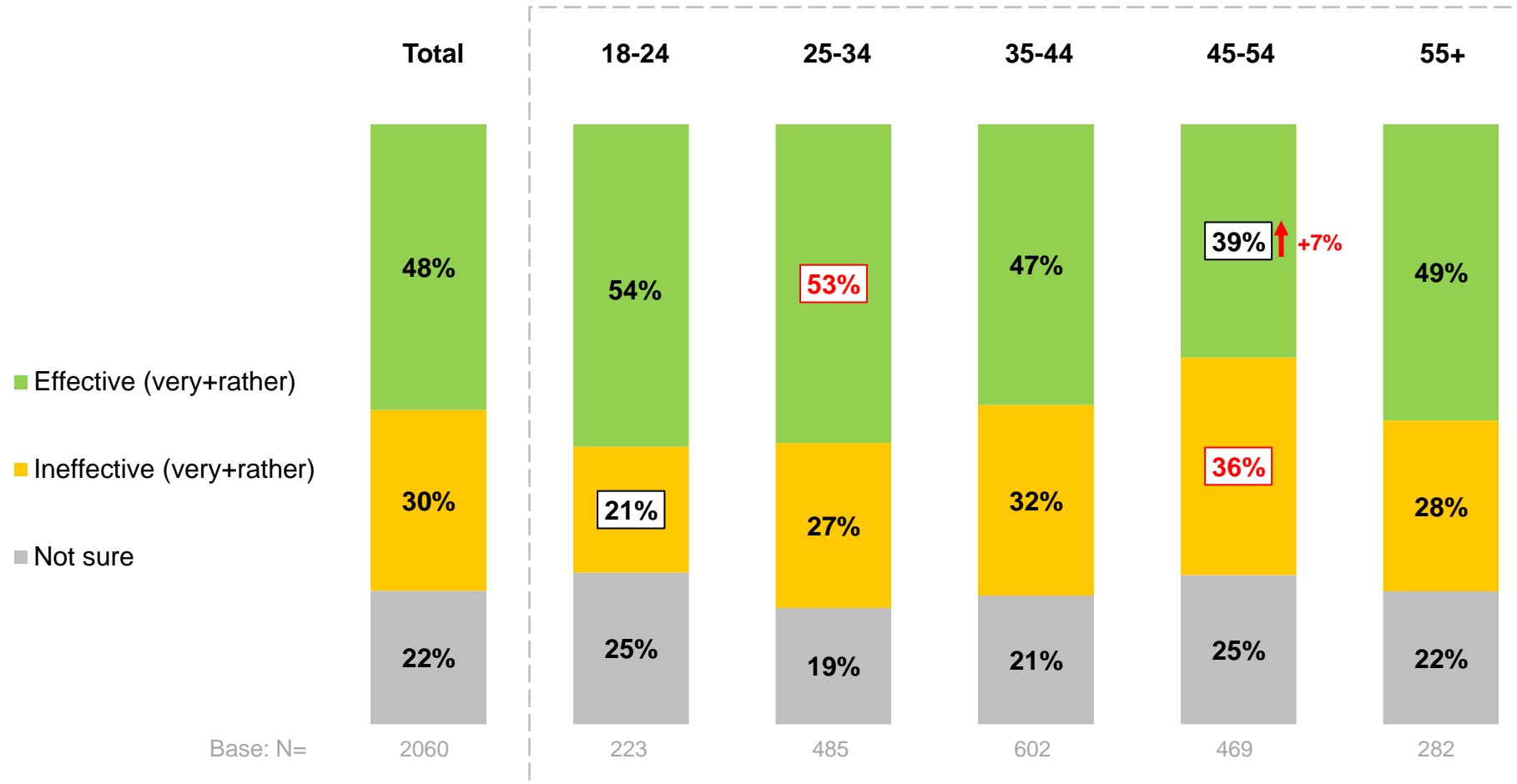
Centre for
Economic
Recovery



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?

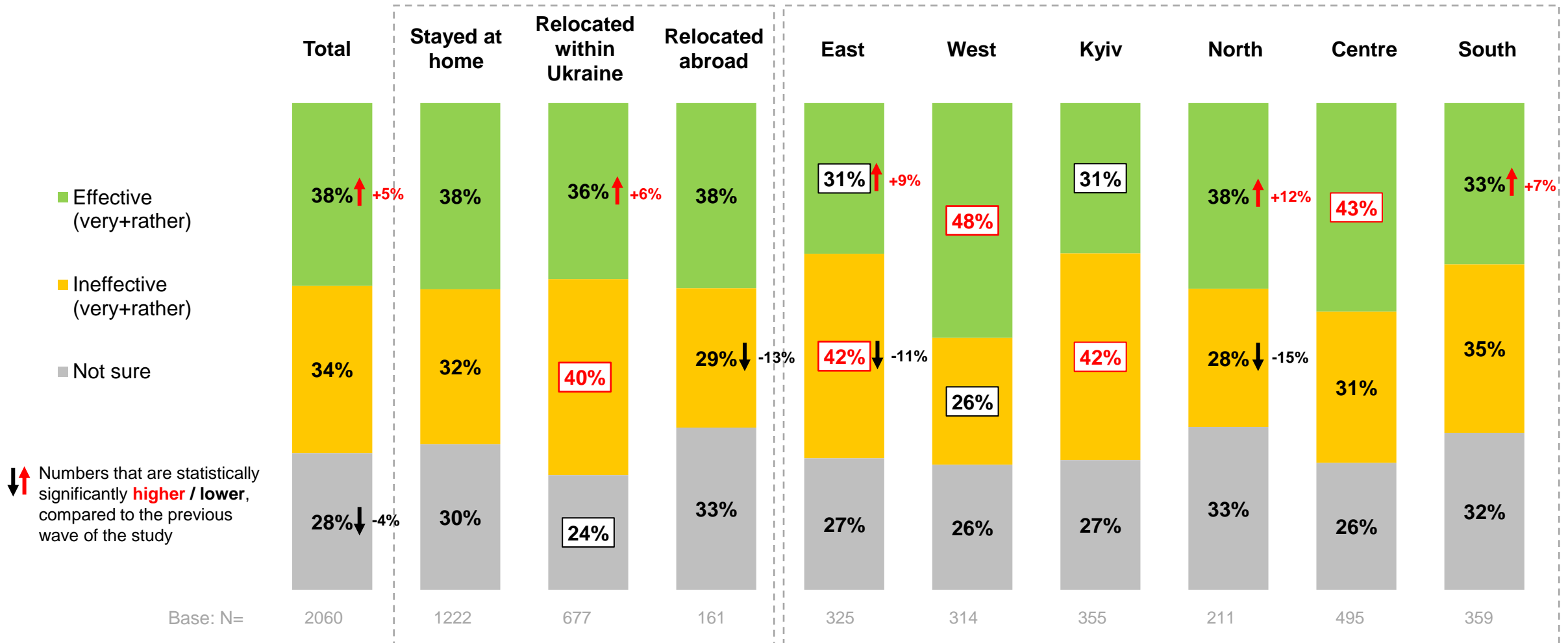
↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

□ 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**



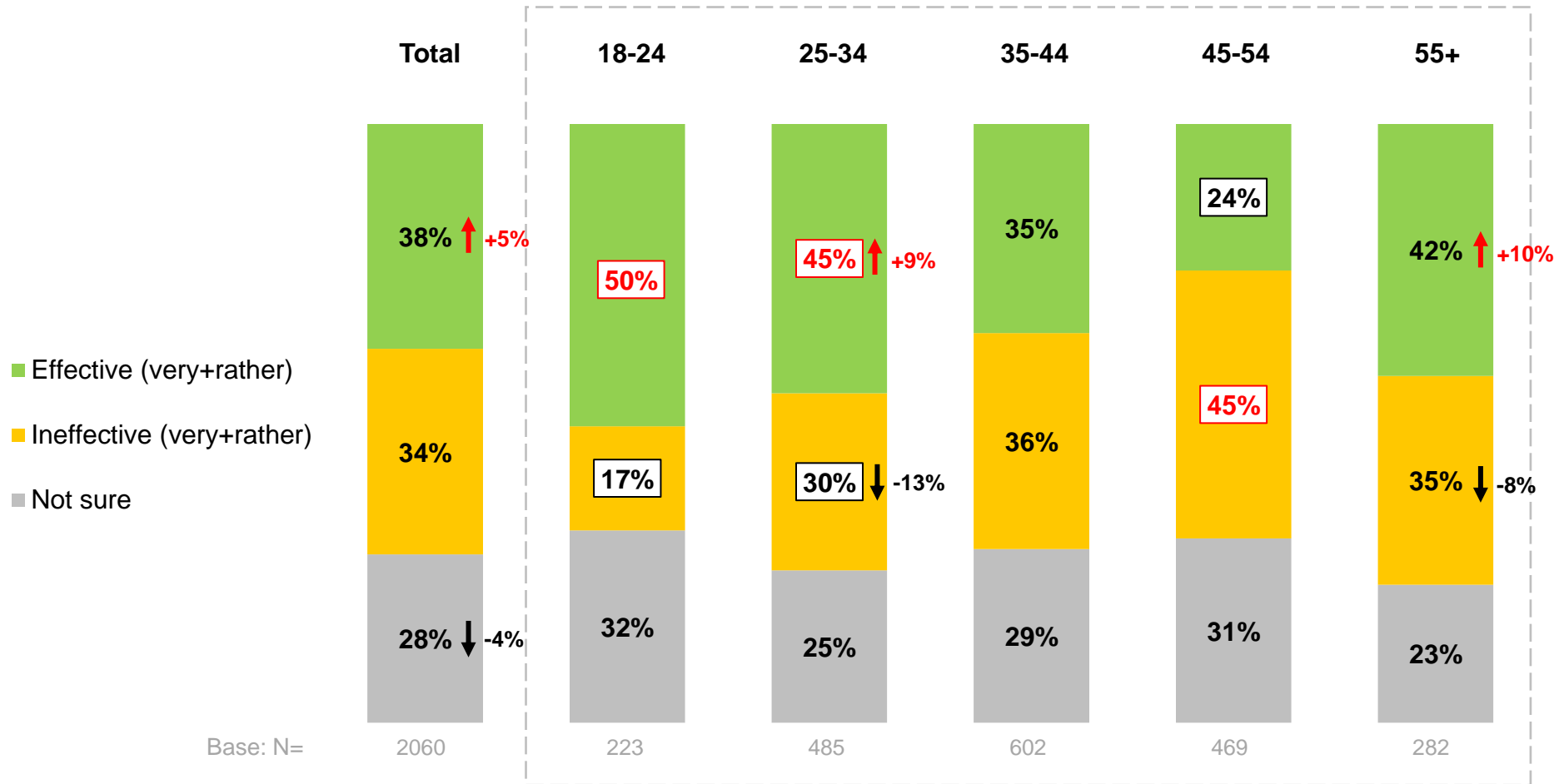
Base: all respondents

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, 48 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?

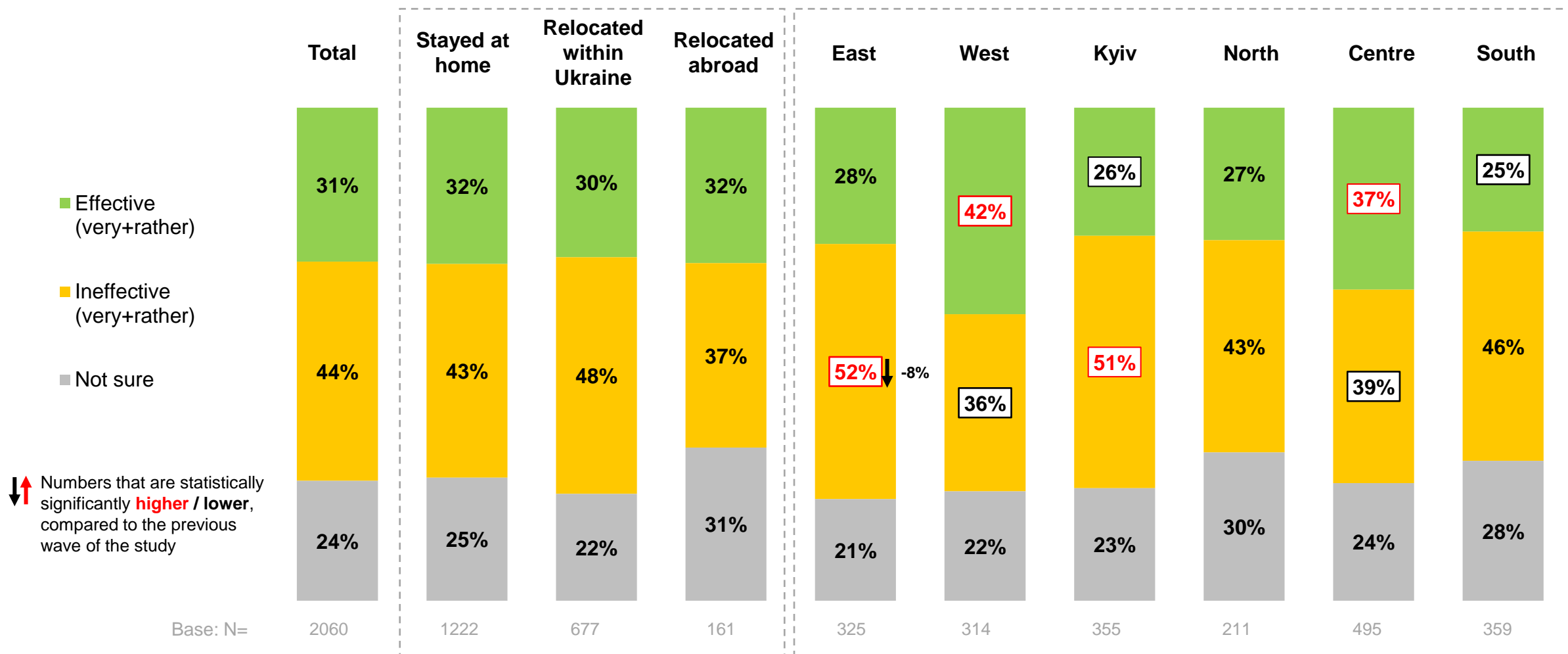
↑ ↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

□ □ 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

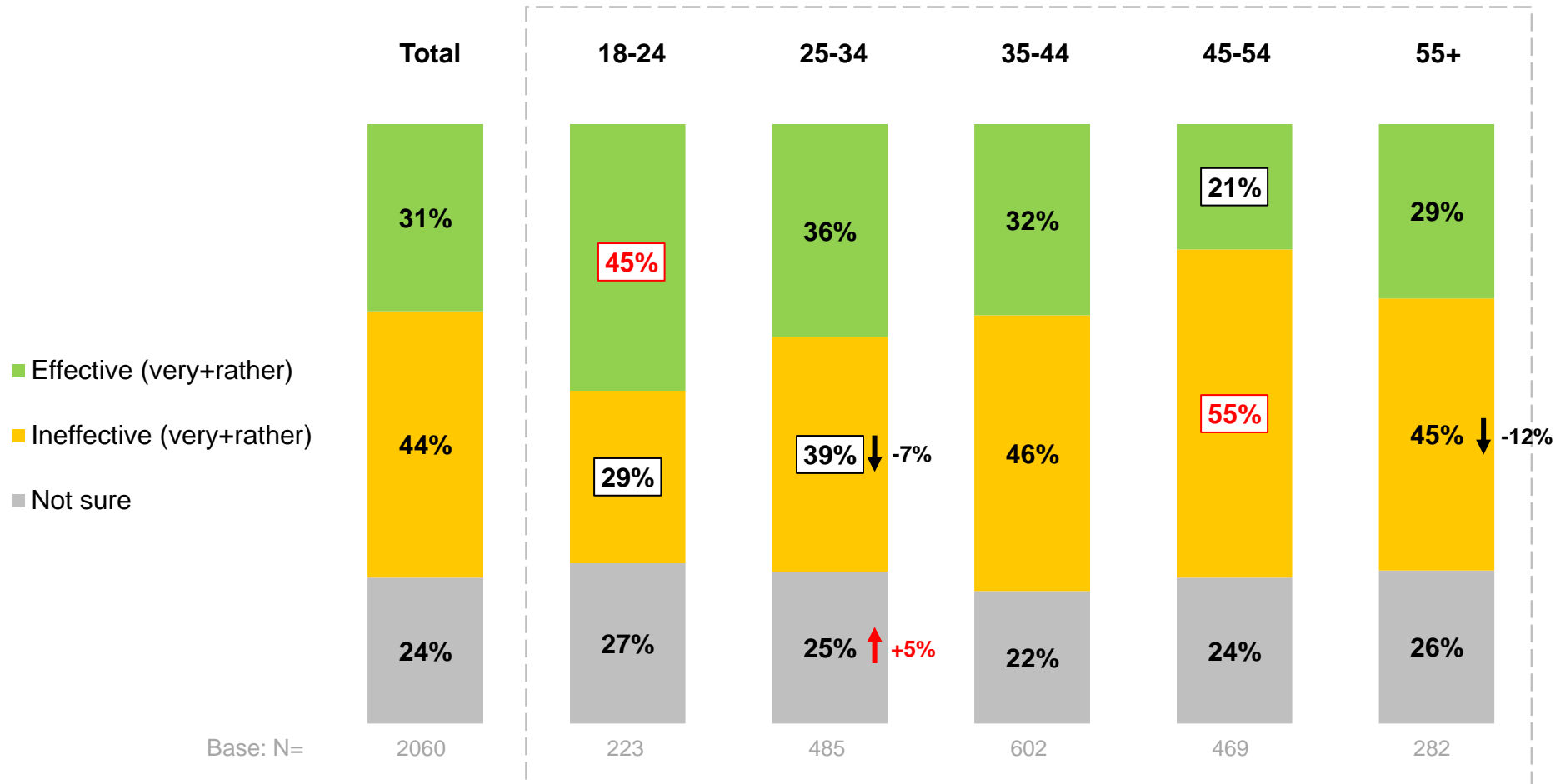
How effective do you consider the actions of the Ukrainian authorities with regard to aiding citizens of Ukraine who lost their job and income during the war?

Numbers that are statistically significantly **higher** / **lower** for a group, 50 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 (64%), the President of Ukraine (44%) and volunteer organizations (26%); the level of trust in the Armed Forces of Ukraine, volunteers and the police increased this time (while the percentage of distrust in all institutions from the list decreased to the level of the ninth wave).

	I wave (20-22.05) N=2083	IX wave (9-11.09) N=2028	X wave (23-26.09) N=2000	XI wave (7-10.10) N=2060
Armed Forces of Ukraine	 62%	 62%	 58%↓	 64%↑
President of Ukraine	 49%	 44%	 42%	 44%
Volunteer organizations	 35%	 28%	 22%↓	 26%↑
Charitable organizations	 15%	 14%	 13%	 15%↑
Doctors	 24%	 14%	 13%	 15%
International organizations*		 15%↑	 14%	 13%
National Police of Ukraine	 16%	 11%	 9%↓	 12%↑
Church	 10%	 10%	 10%	 9%
Government of Ukraine	 13%	 9%	 8%	 9%
Media*		 7%↑	 5%↓	 6%
Verkhovna Rada of Ukraine	 7%	 5%	 5%	 4%
National Bank of Ukraine	 7%	 4%	 4%	 4%
Ministry of Finance of Ukraine	 4%	 2%	 2%	 3%
State Customs Service of Ukraine	 3%	 2%	 2%	 2%
State Tax Service	 2%	 1%	 1%	 2%
Courts	 2%	 1%	 1%	 1%
None of the above	 7%	 8%	 10%↑	 8%↓

*were added in 7th wave of survey

Base: all respondents

Which of the following institutions do you trust?

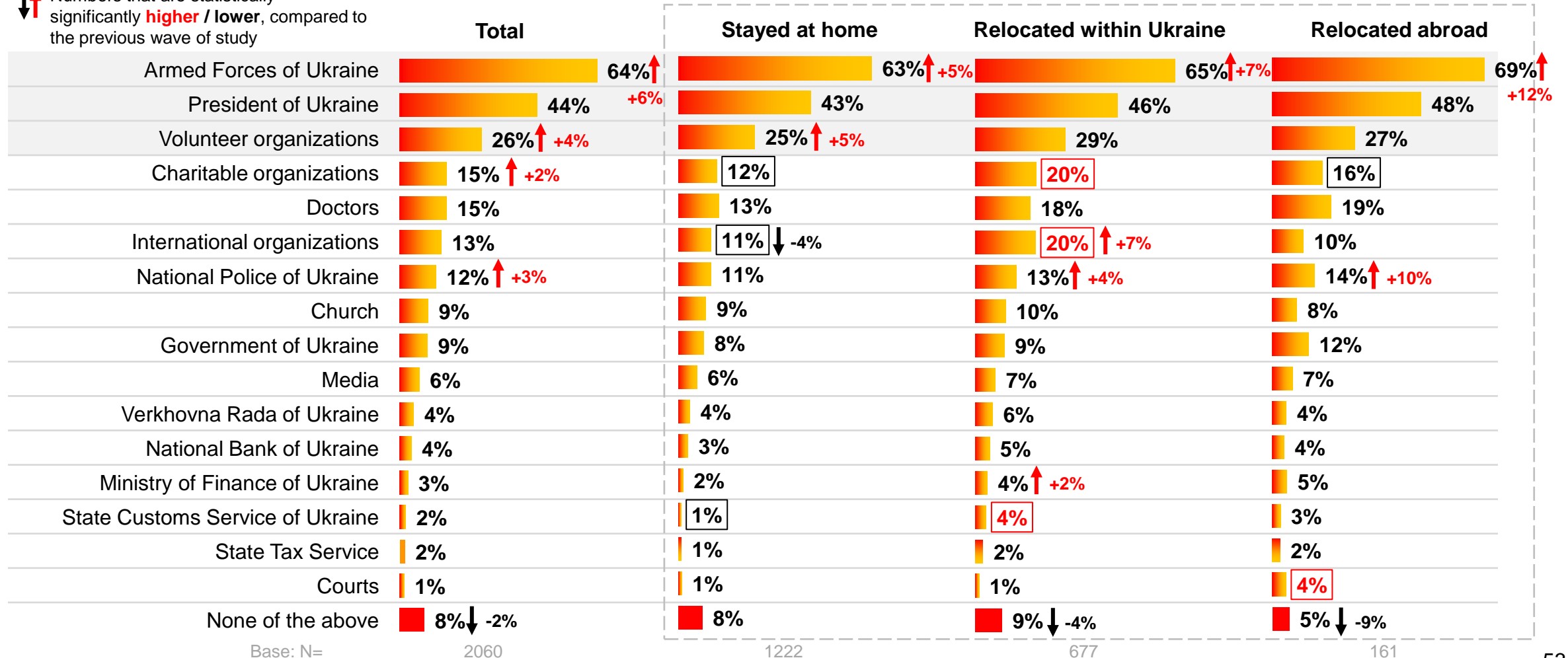
↓↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

TRUST IN INSTITUTIONS

by migration status

Respondents who stayed at home trust international and charitable organizations less than the sample as a whole (the latter are also less trusted by those who went abroad), while those who relocated within Ukraine trust these organizations more. In the eleventh wave, trust in the Armed Forces of Ukraine increased the most - among all groups.

↓↑ 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?

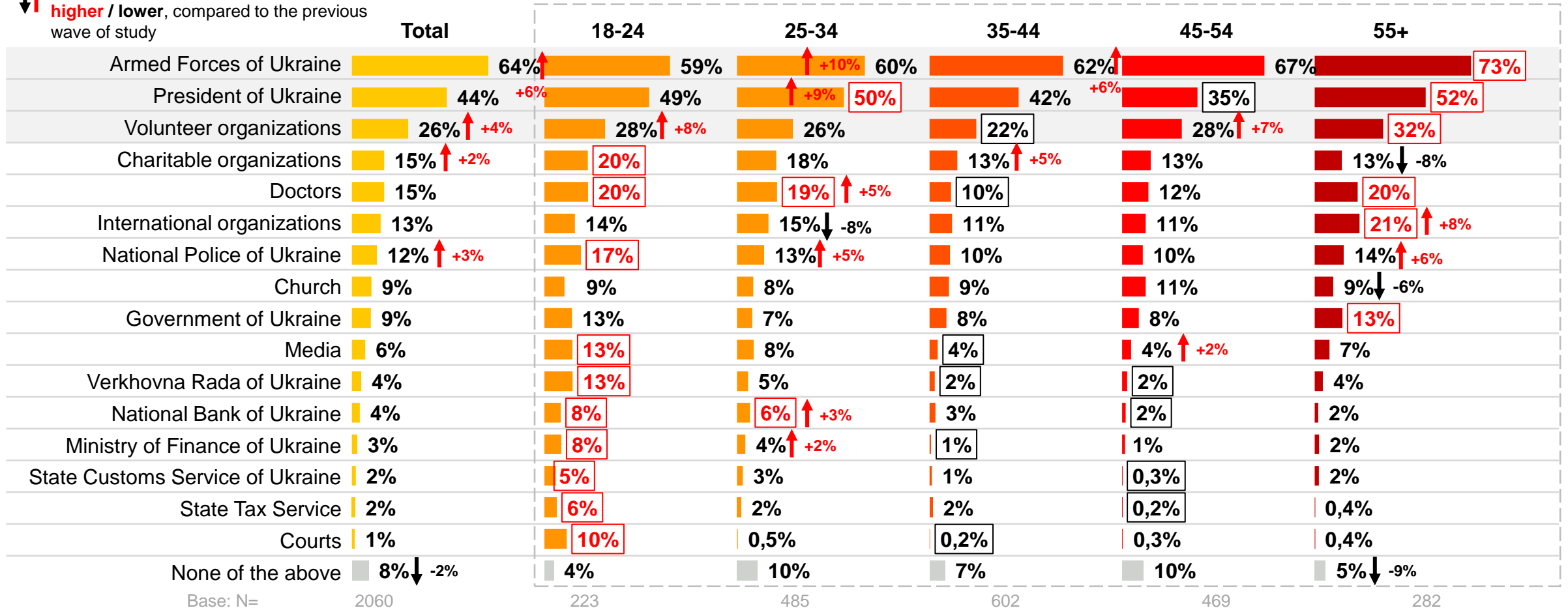
Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

TRUST IN INSTITUTIONS

by age

Respondents aged 18-24 and 55+ trust a large number of institutions significantly more than other age groups. However, in the eleventh wave, there was a significant increase in the trust in a number of institutions among representatives of 25-34 age group: the Armed Forces of Ukraine, the President, doctors, the police, the National Bank, and the Ministry of Finance.

↓↑ 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?

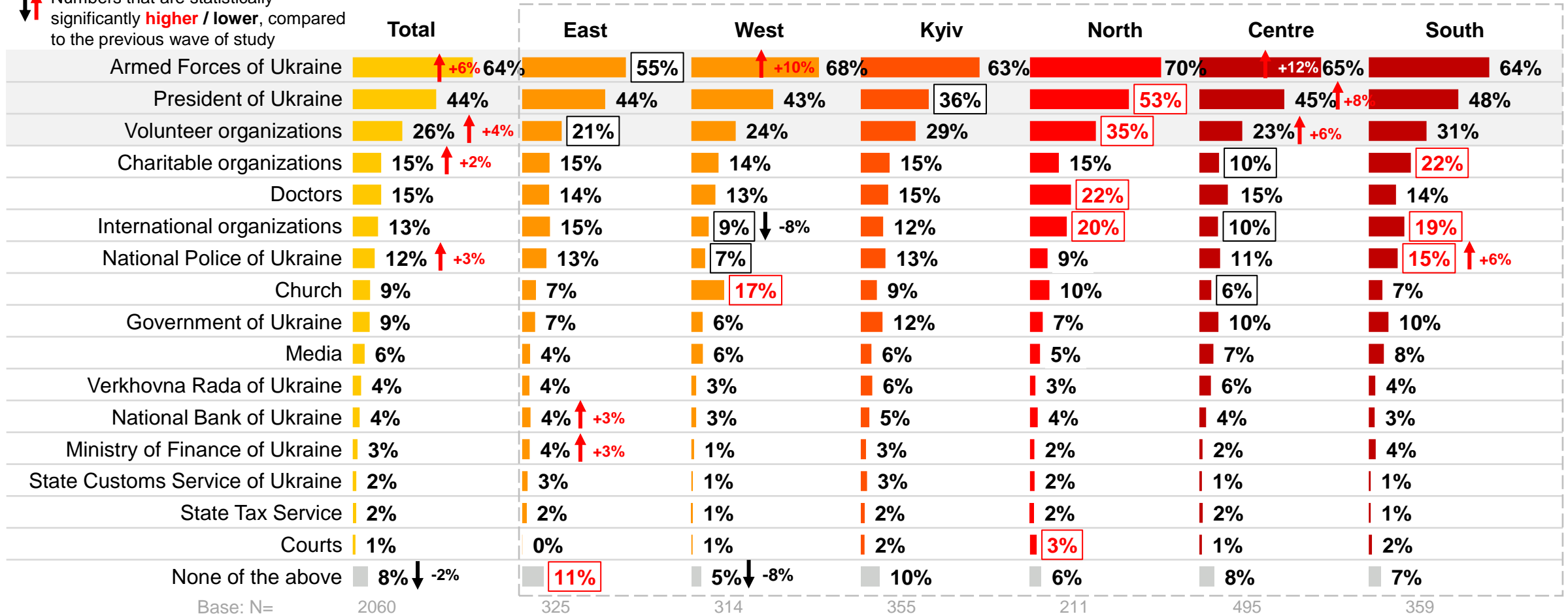
Numbers that are statistically significantly **higher** / **lower** for the age 54 group, compared to the sample as a whole

TRUST IN INSTITUTIONS


by region

In the eleventh wave, the trust in the Armed Forces of Ukraine has increased the most significantly among residents of the West and the Centre - by 10 and 12 percentage points, respectively. Also, among the latter, there was an increase in the trust in the President of Ukraine and volunteers.

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

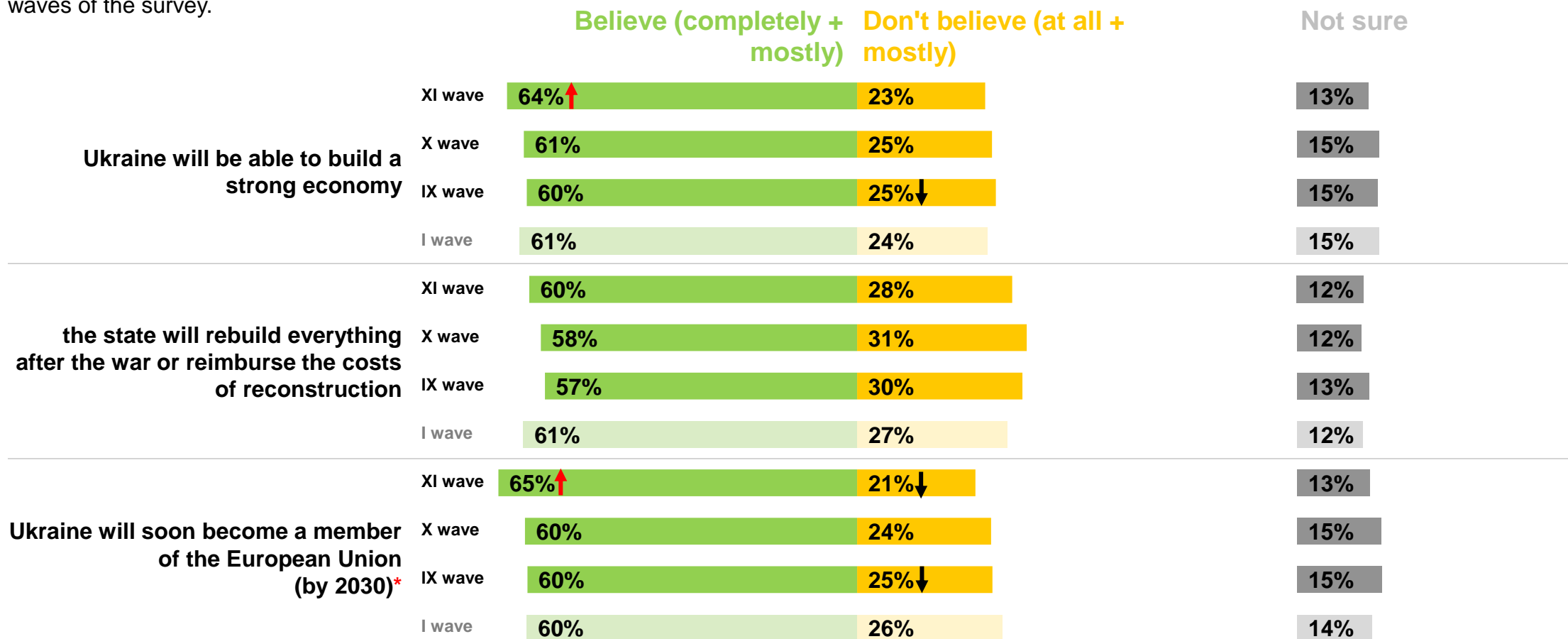


Base: all respondents
Which of the following institutions do you trust?

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

UKRAINIANS'* BELIEF THAT...

The belief of Ukrainians* that the state will be able to rebuild everything what was destroyed after the war remains without significant changes and is at 60%. At the same time, the belief that Ukraine will be able to build a strong economy and become a member of the EU in the near future has increased significantly and is at the level of 64-65% - this is the highest point for all waves of the survey.





*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, IX wave – N = 2028, X wave – N = 2000, XI wave – N = 2060.

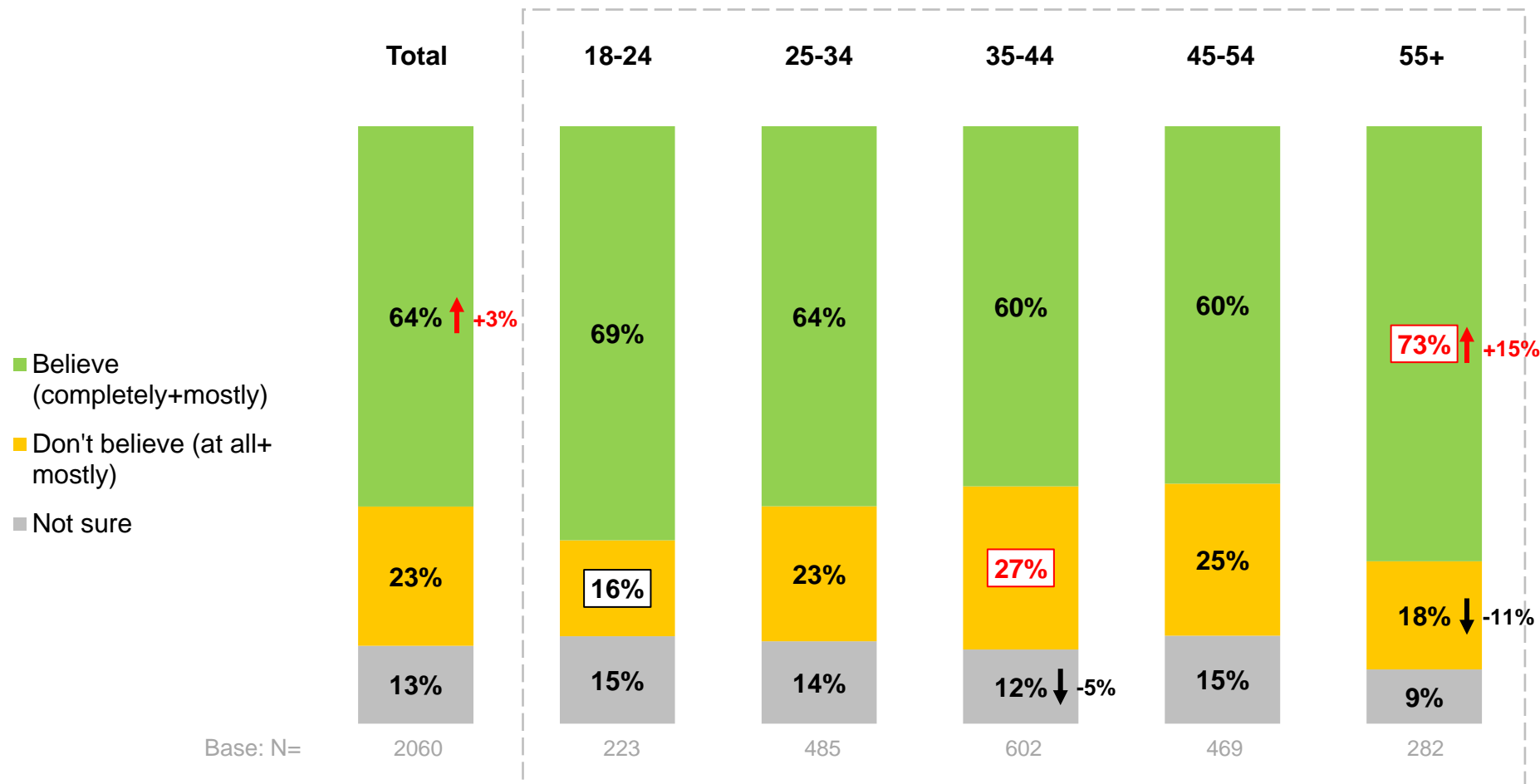
Do you believe that : Ukraine will be able to build a strong economy / the state will rebuild everything after the war or reimburse the costs of reconstruction / Ukraine will soon become a member of the European Union (by 2030)?

 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;

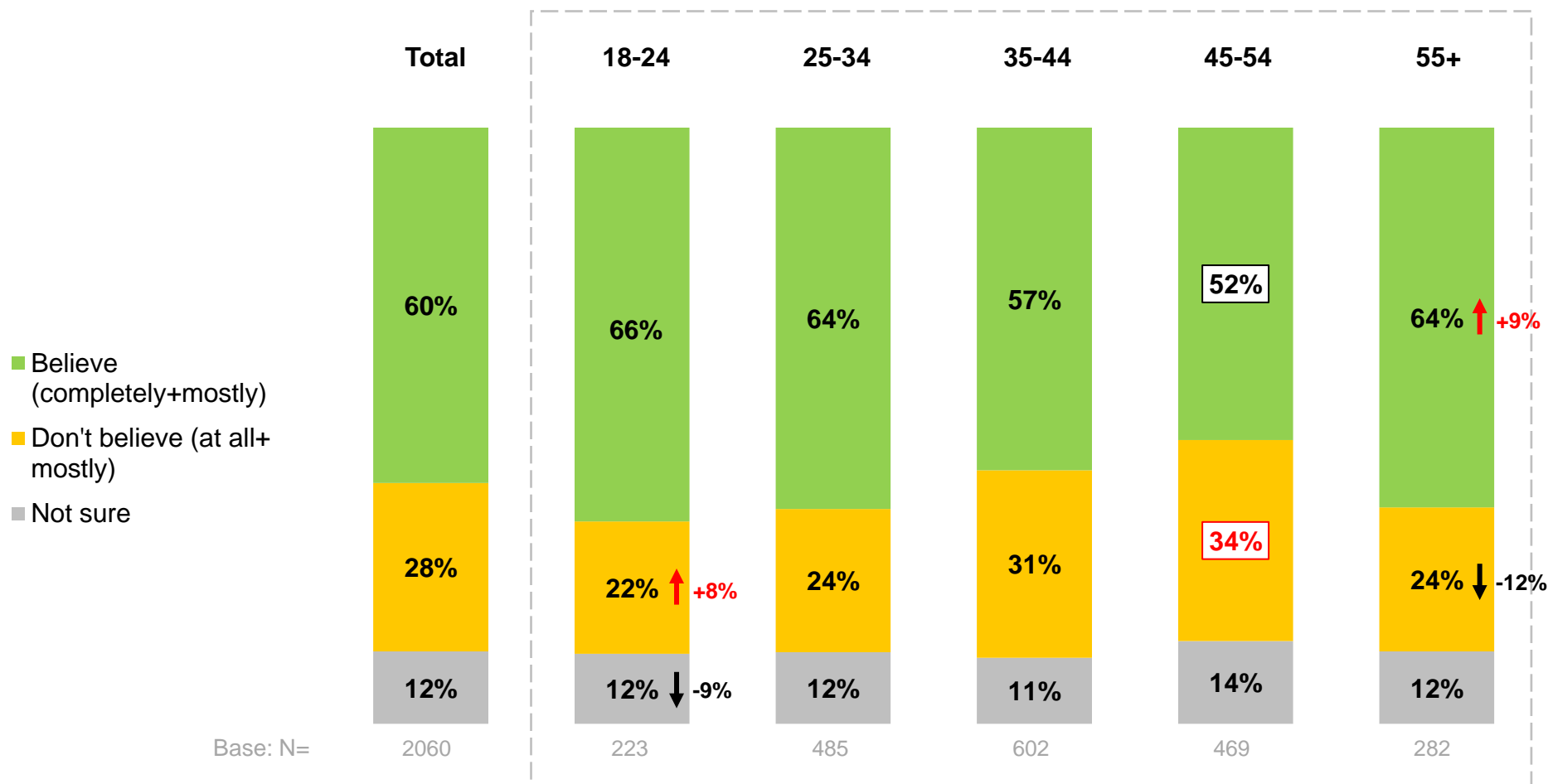
Do you believe that Ukraine will be able to build a strong economy?

↑↓ 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;

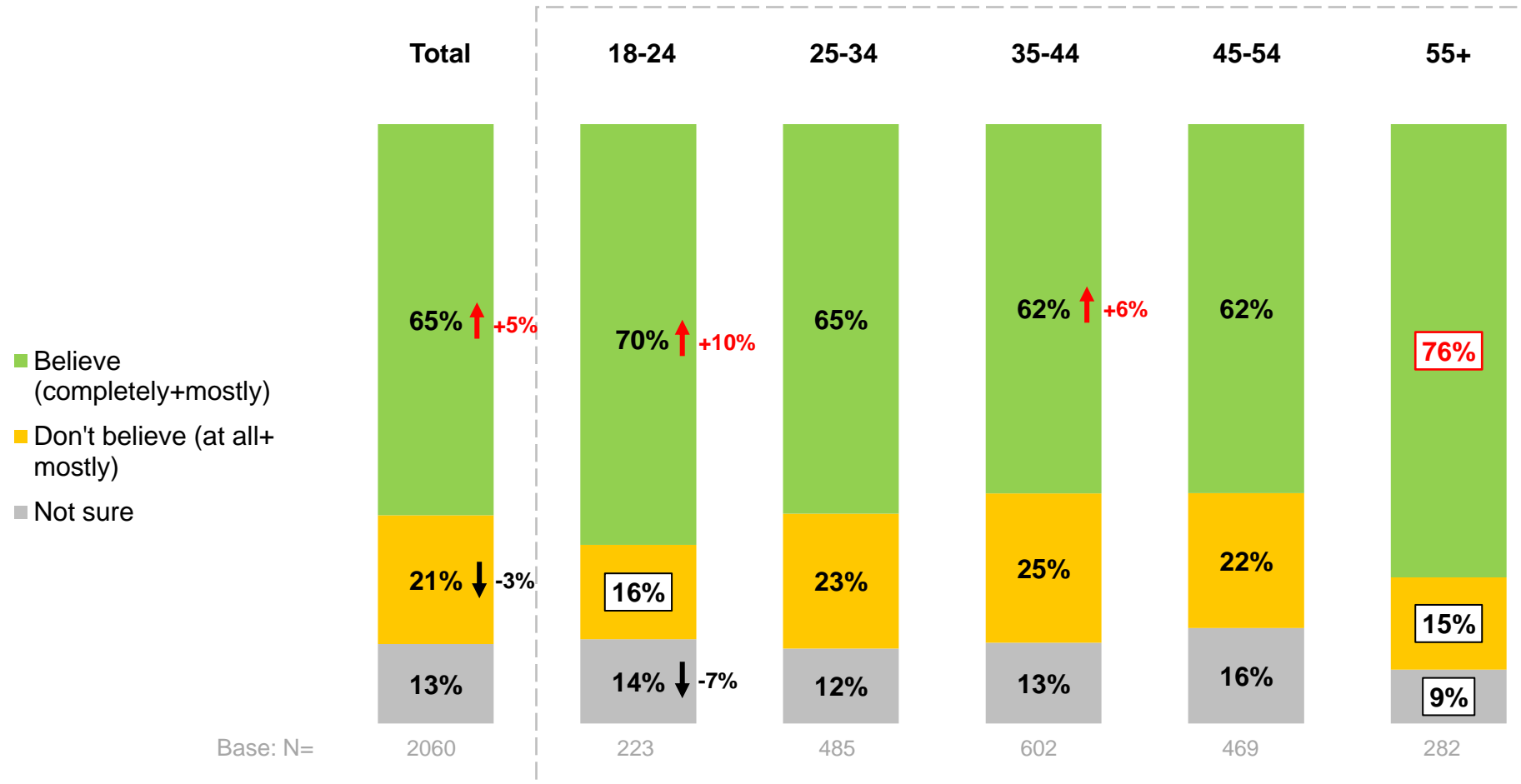
Do you believe that the state will rebuild everything after the war or reimburse the costs of reconstruction?

↑↓ 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



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

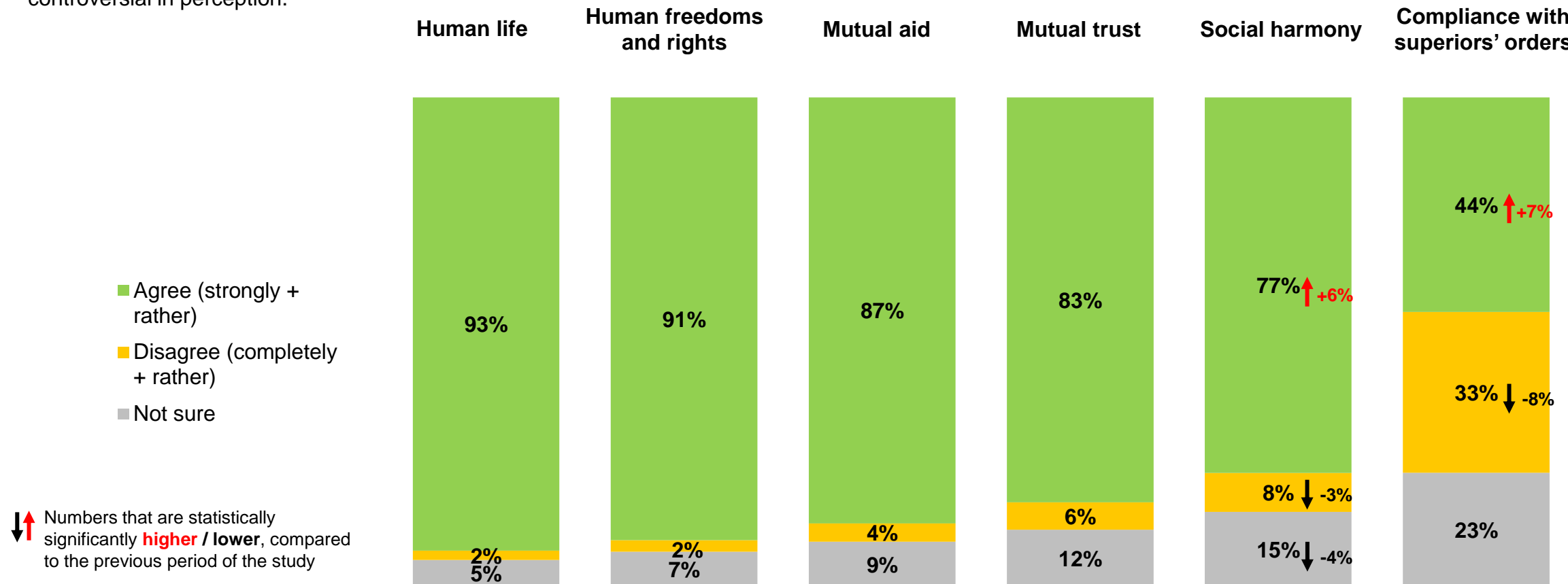
□ Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

**THE IMPORTANCE OF
VALUES AND OBSERVANCE
OF THE PRINCIPLES**



WHAT IS OF THE GREATEST VALUE?

The largest share of respondents agree that human life is the greatest value – 93% supported this statement. More than 80% agreed with relevant statements about freedom and human rights, mutual aid and trust. 77% of respondents consider social harmony to be the greatest value - this percentage has significantly increased in the current wave. Also, there was a significant increase in the percentage of those who consider “compliance with superiors’ orders” the greatest value - now there are more such people than those who categorically do not think so - 44% vs 33%. At the same time, this value remains the most controversial in perception.



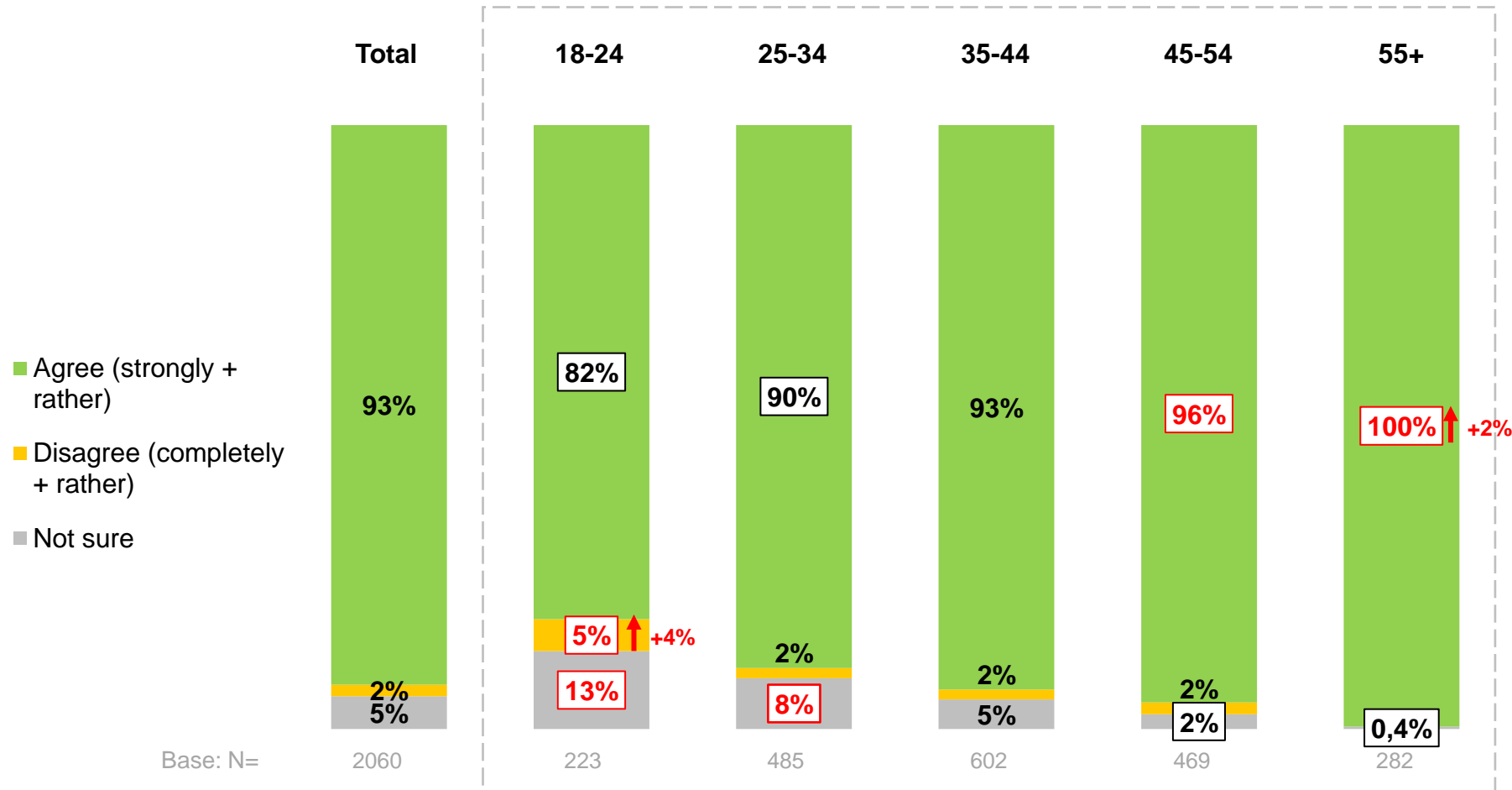
Base: all respondents, N=2060

To what extent do you agree with the statement: The life of a person is the greatest value / A person's freedom and rights are the greatest value / Social harmony is the greatest value / Compliance with superiors' orders is the greatest value / Mutual help is the greatest value / Mutual trust is the greatest value

HUMAN LIFE

is the greatest value

by age



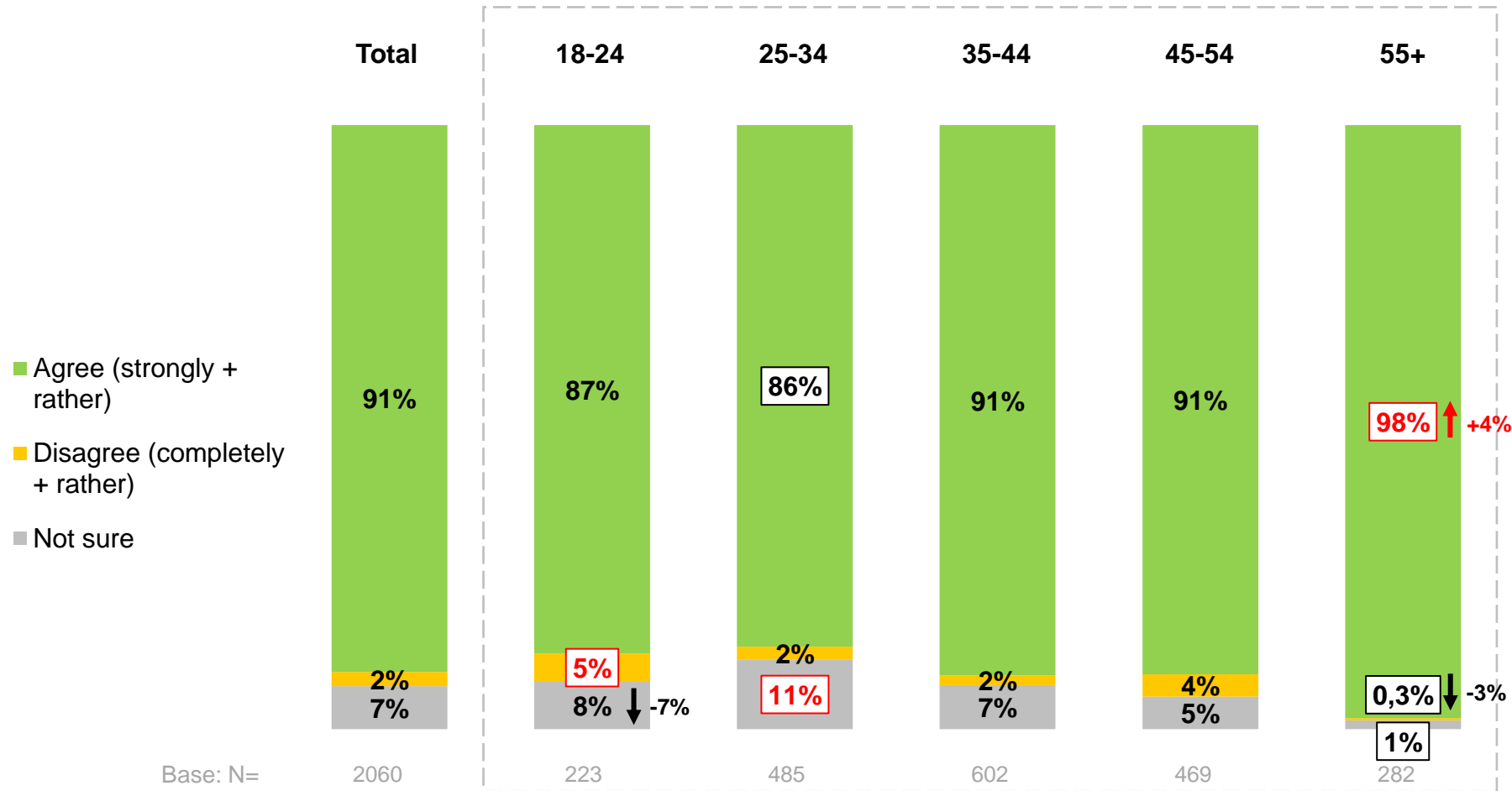
↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study

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

HUMAN FREEDOMS AND RIGHTS

are the greatest values

by age



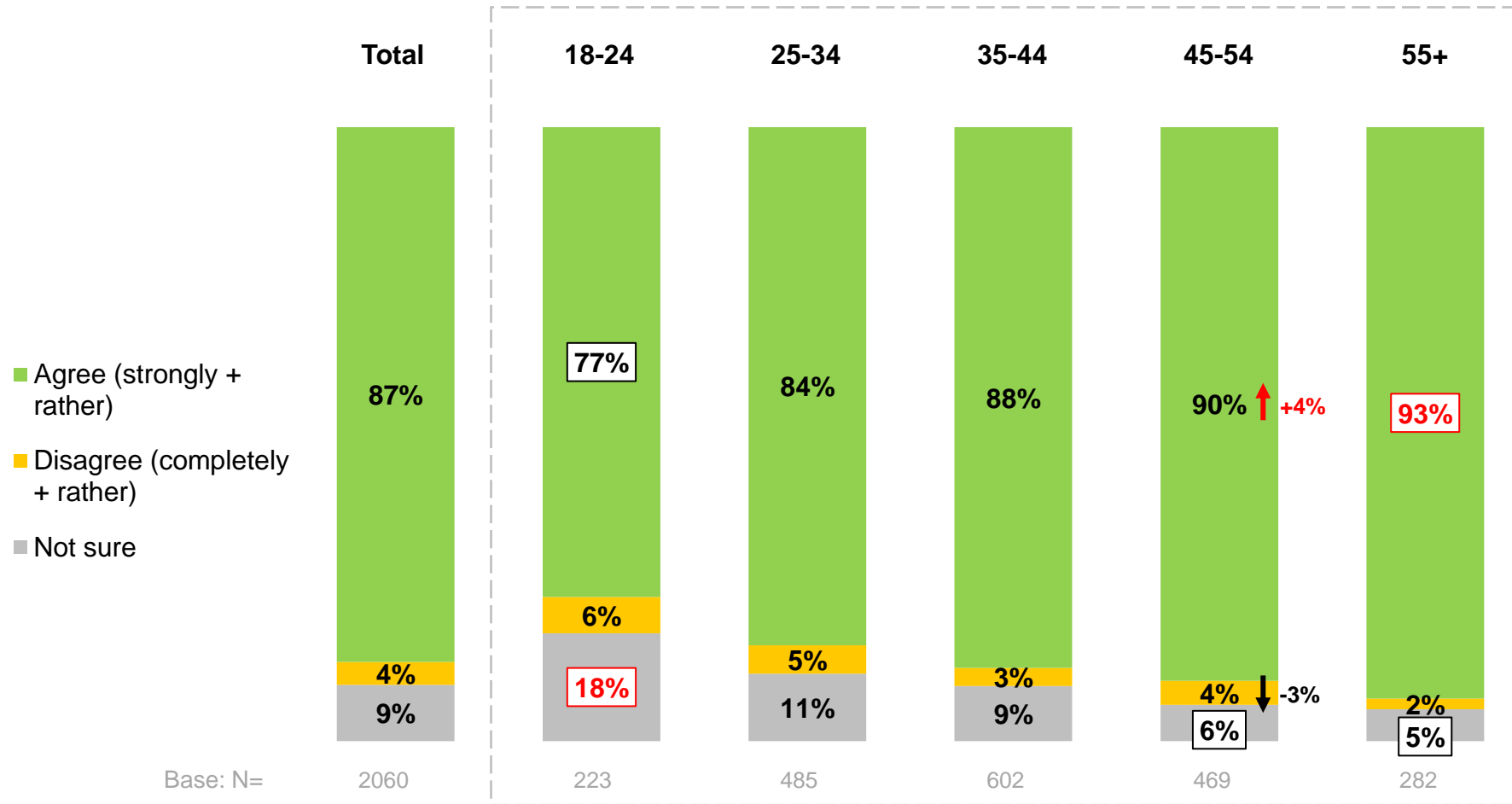
↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study

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

MUTUAL AID

is the greatest value

by age



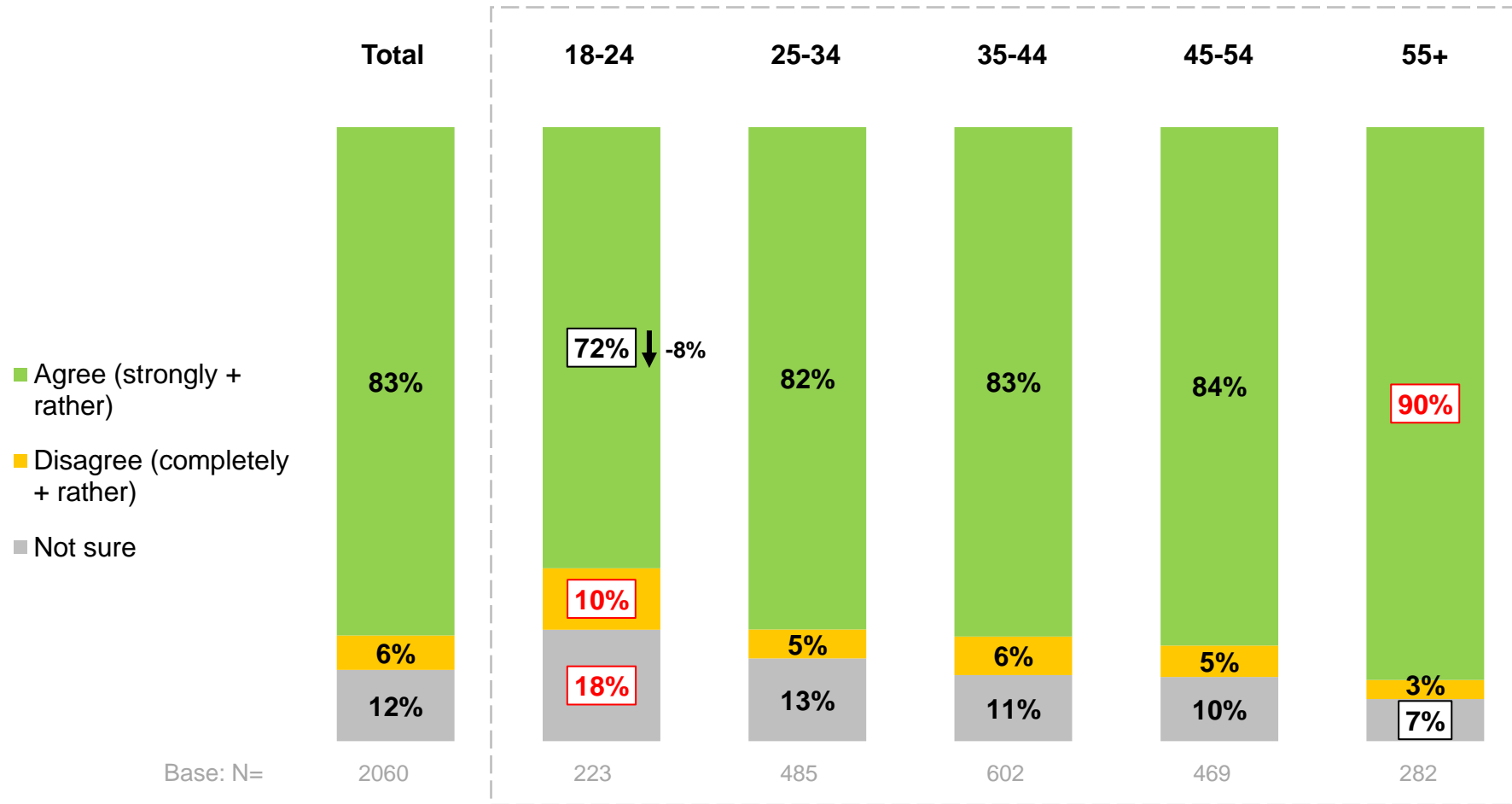
↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study


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


MUTUAL TRUST

is the greatest value

by age



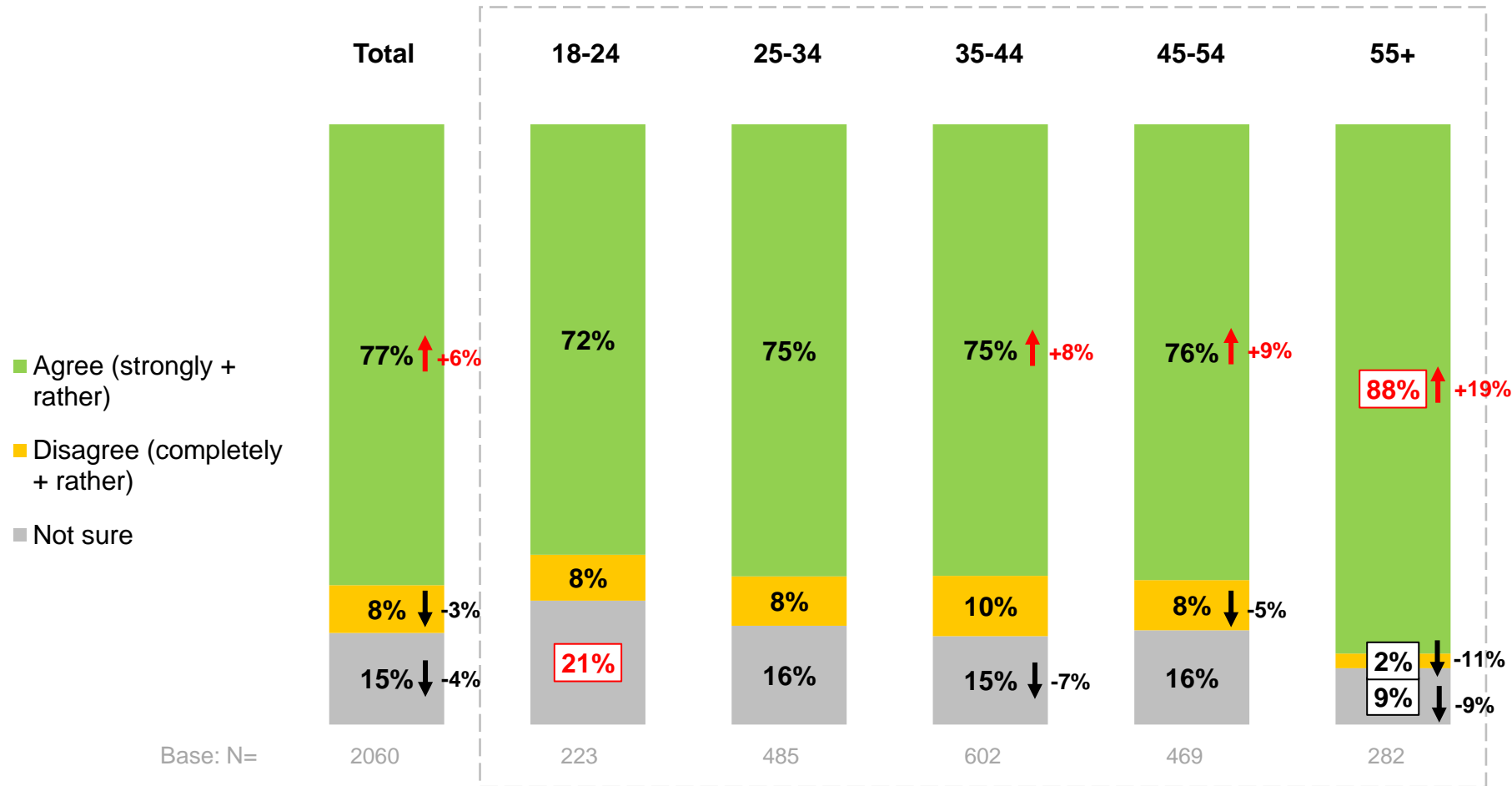

 Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study




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



SOCIAL HARMONY

is the greatest value

by age



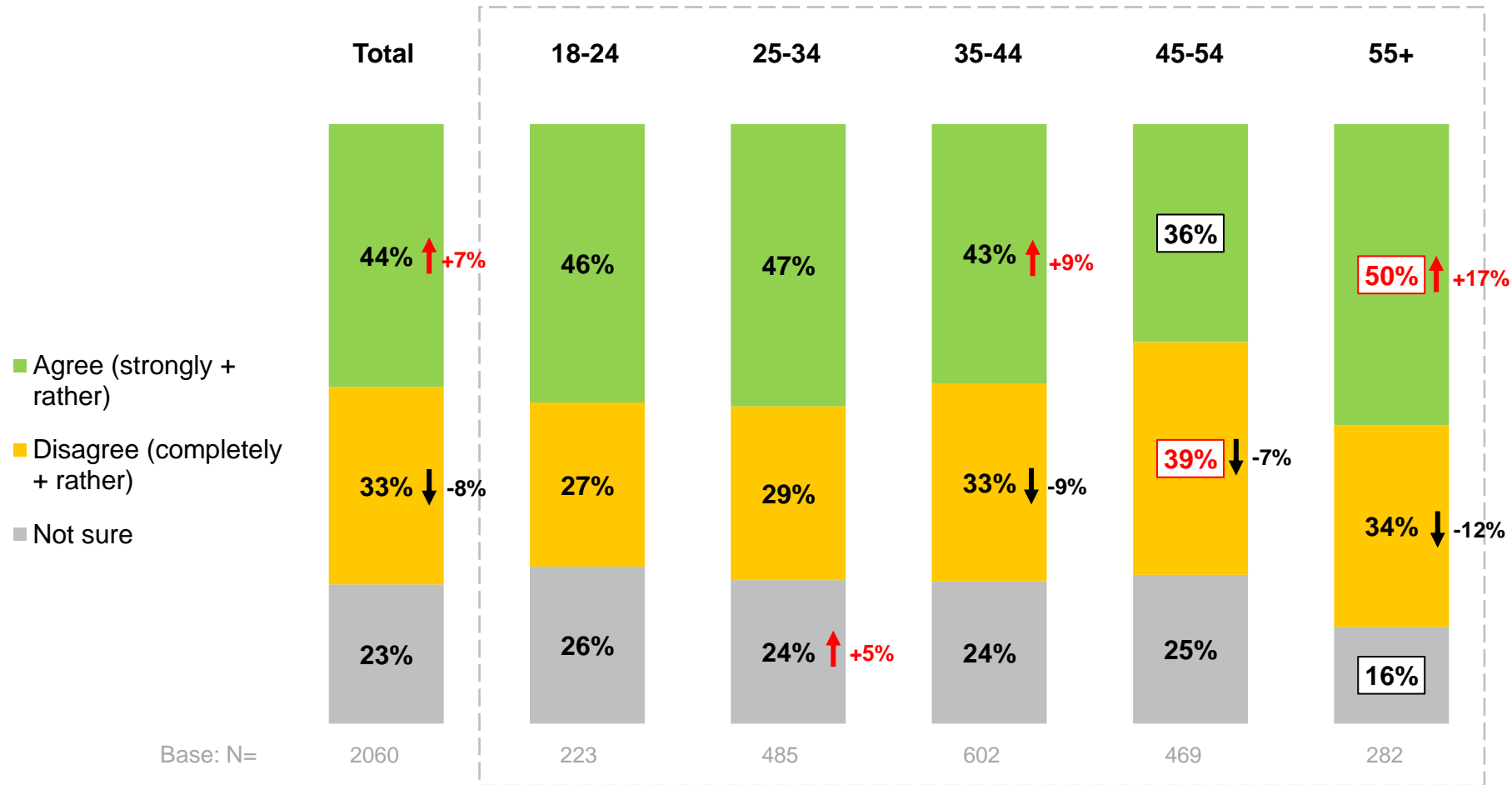


 Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study



 Numbers that are statistically significantly **higher** / **lower** for the age 66 group, compared to the sample as a whole

COMPLIANCE WITH SUPERIORS' ORDERS

is the greatest value

by age

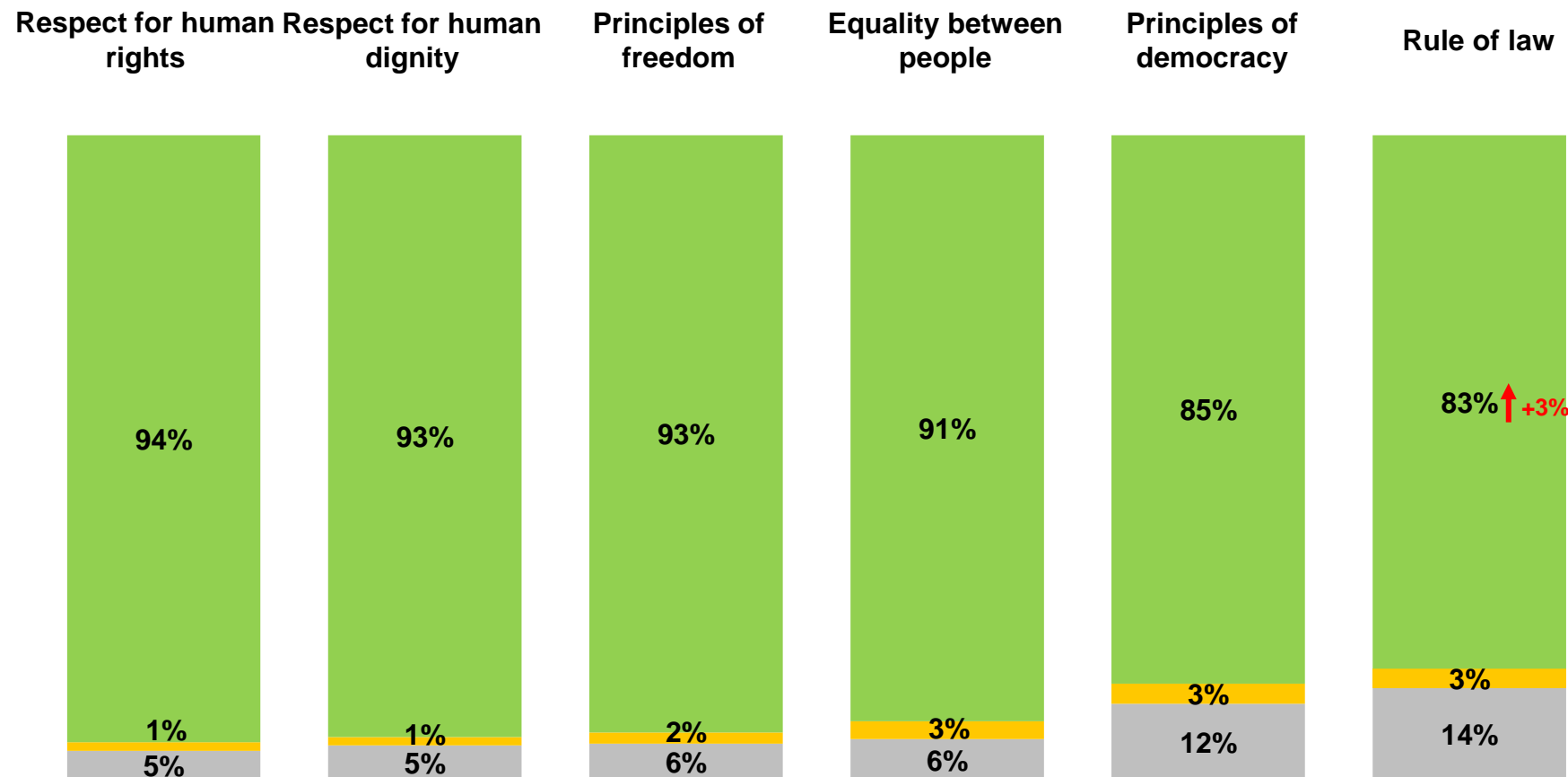


↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study

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

THE IMPORTANCE OF OBSERVANCE OF THE MAIN PRINCIPLES

The importance of observance of all the mentioned principles is invariably high for the respondents and is at the level of 83-94%; the most widely supported of the principles is respect for human rights, and the least supported is the rule of law. At the same time, the share of those who agree with the importance of this principle increased significantly in the eleventh wave.



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

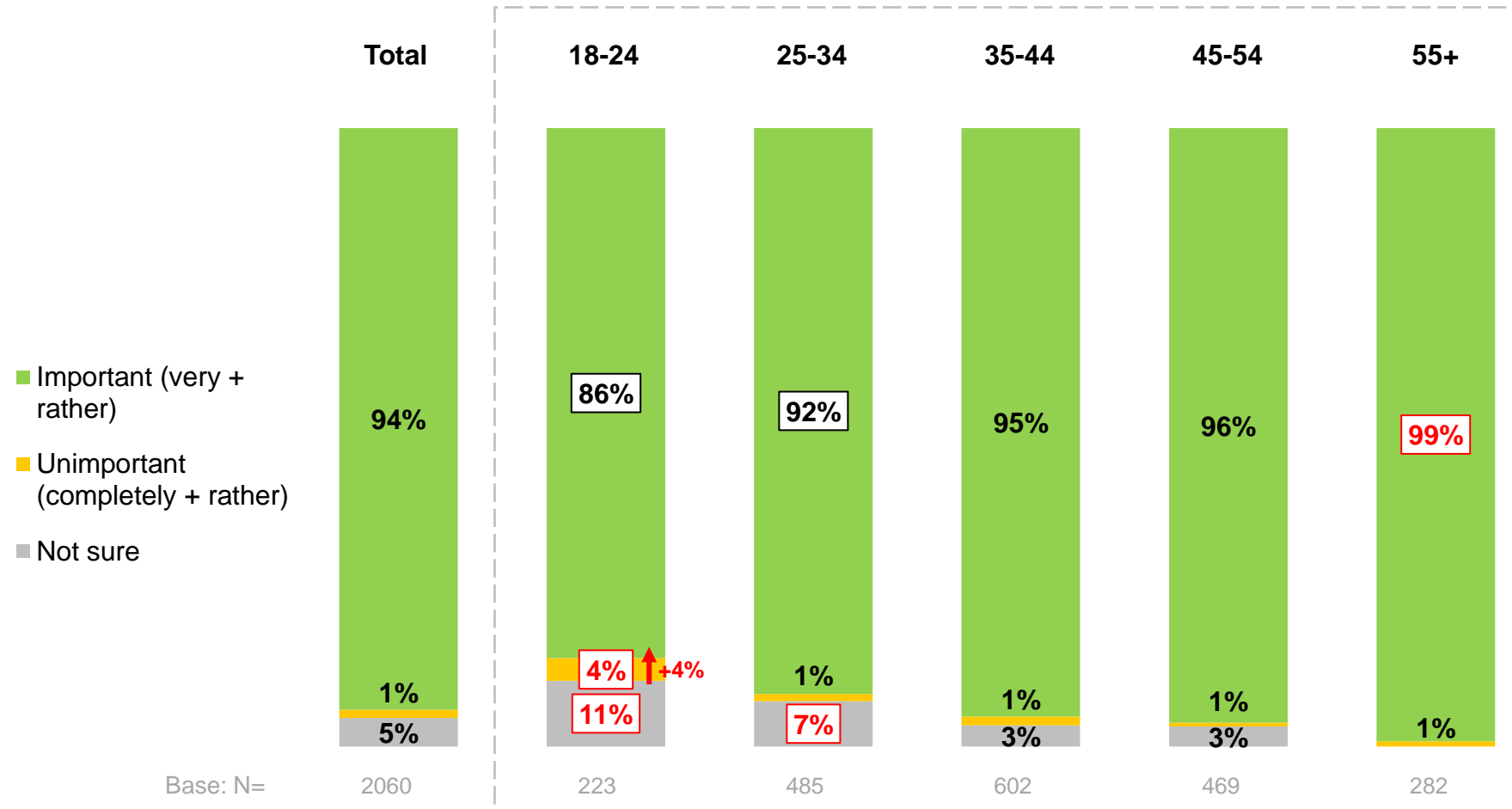
Base: all respondents, N=2060

For you personally, how important is the observance of: rule of law / equality between people / principles of freedom / principles of democracy / respect for human dignity / respect for human rights

THE IMPORTANCE OF OBSERVANCE

of respect for human rights

by age



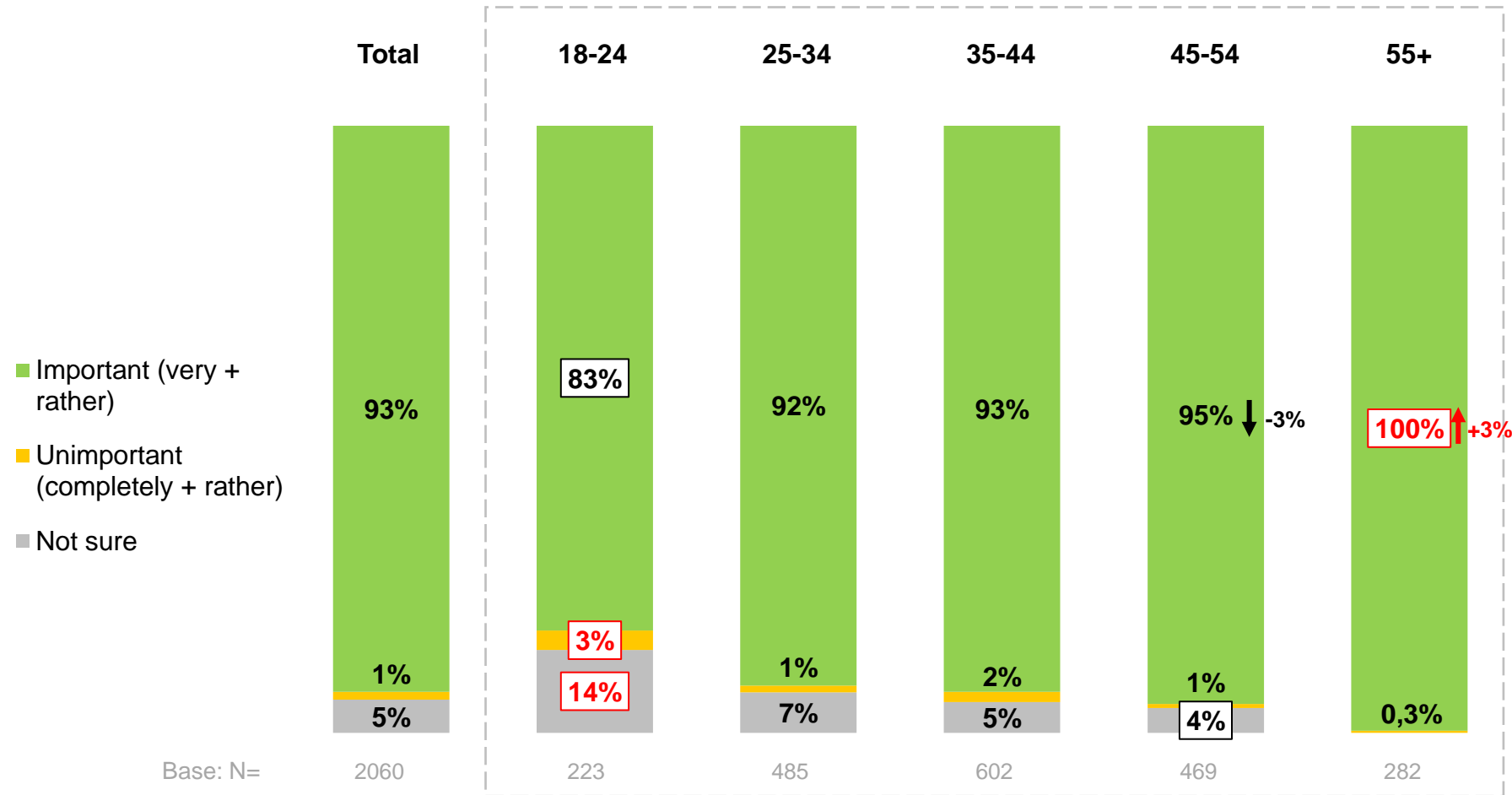
↓ ↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study



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



THE IMPORTANCE OF OBSERVANCE

of respect for human dignity

by age



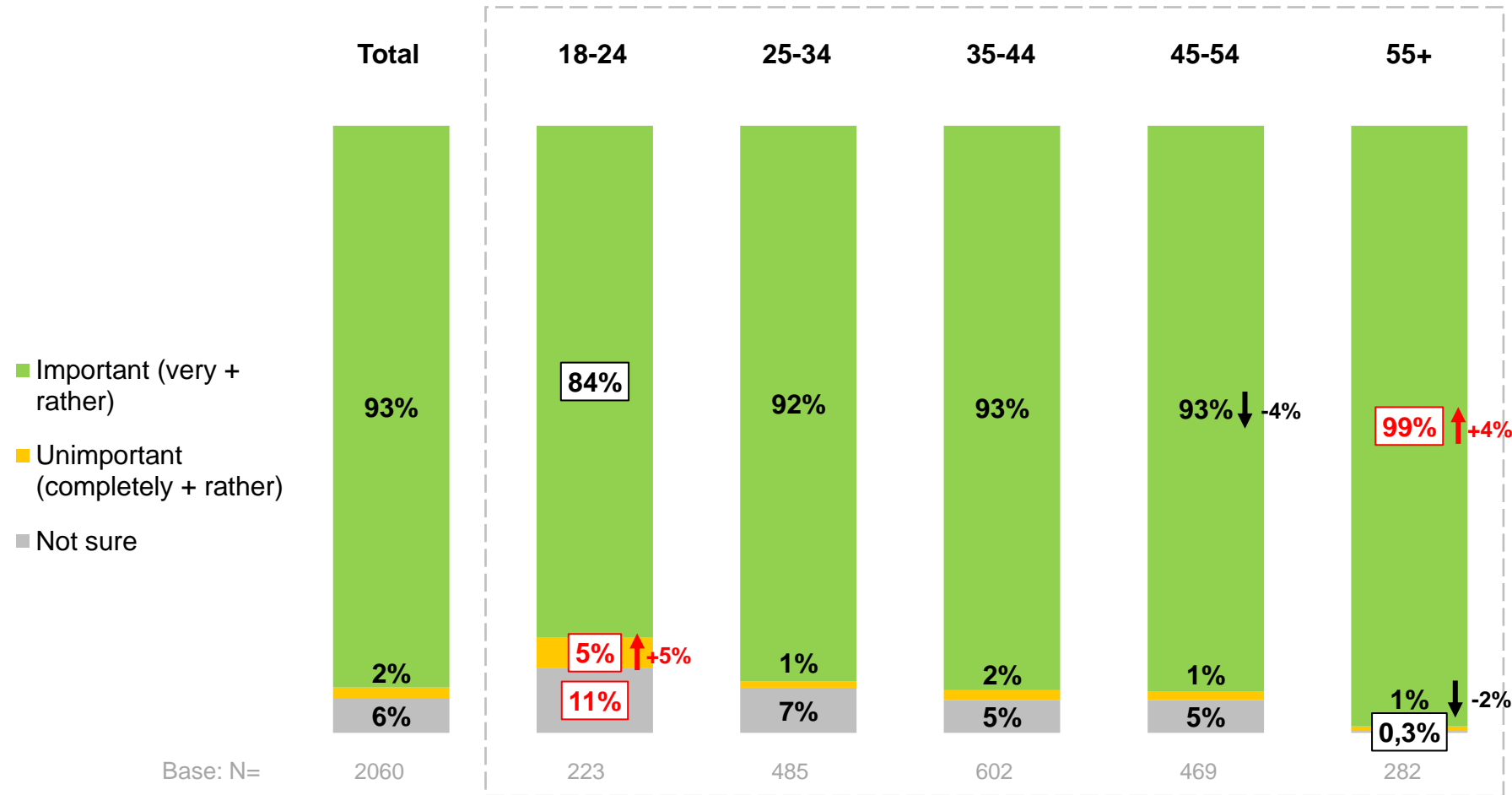


 Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study





 Numbers that are statistically significantly **higher** / **lower** for the age 70 group, compared to the sample as a whole



THE IMPORTANCE OF OBSERVANCE

of principles of freedom

by age

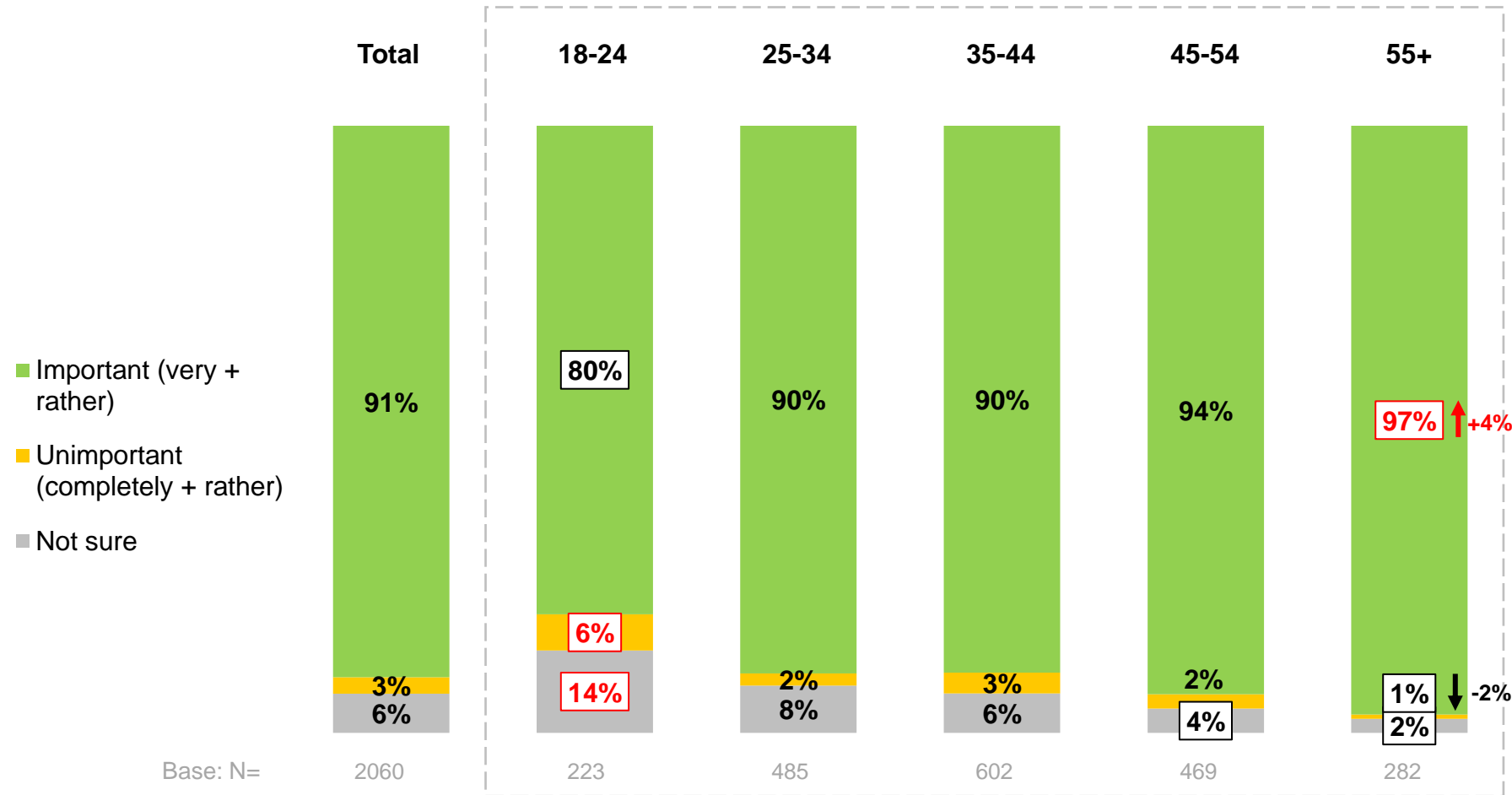




 Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study



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

THE IMPORTANCE OF OBSERVANCE

of equality between people
by age



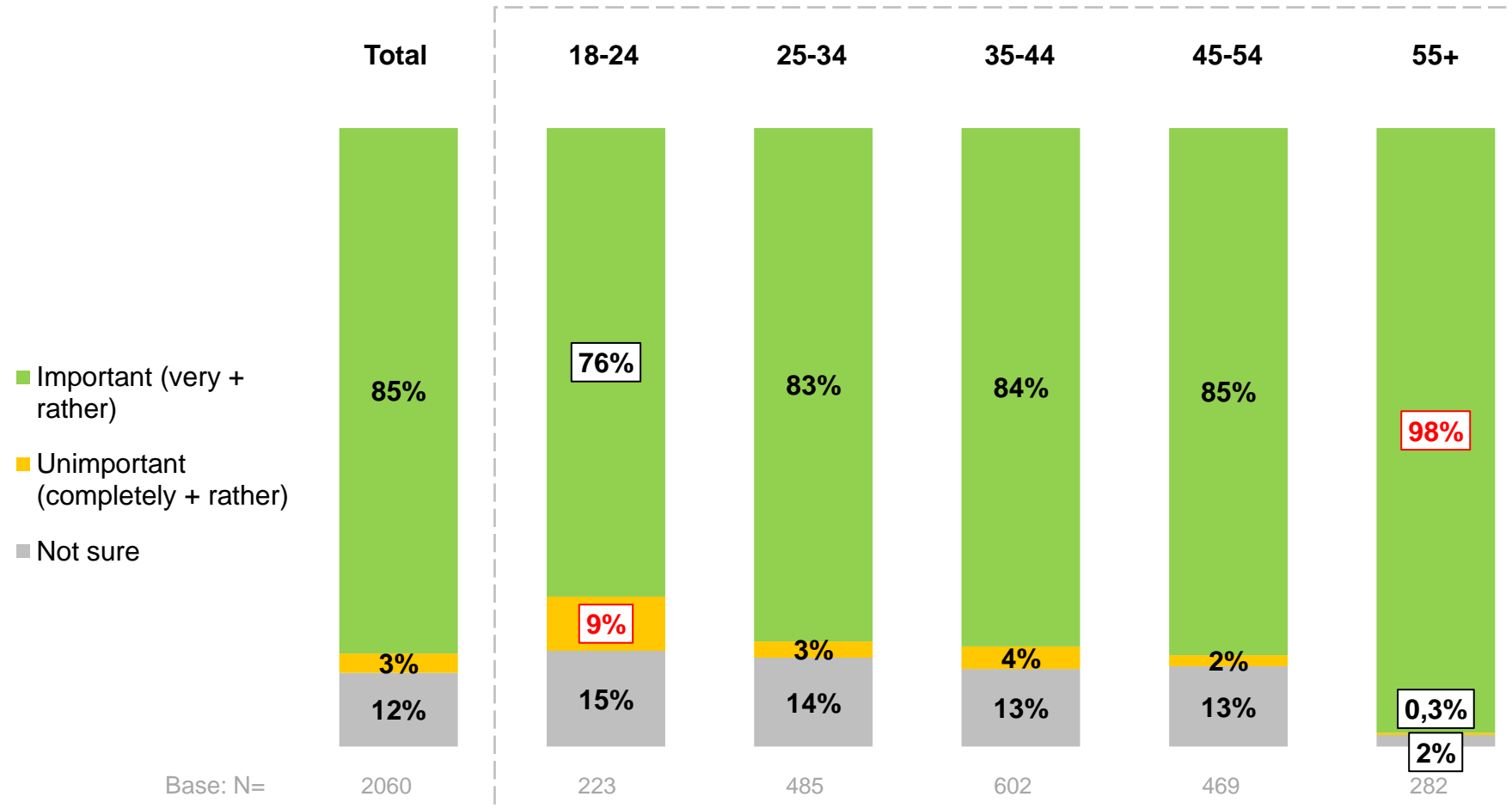
↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study



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

THE IMPORTANCE OF OBSERVANCE



of principles of democracy

by age



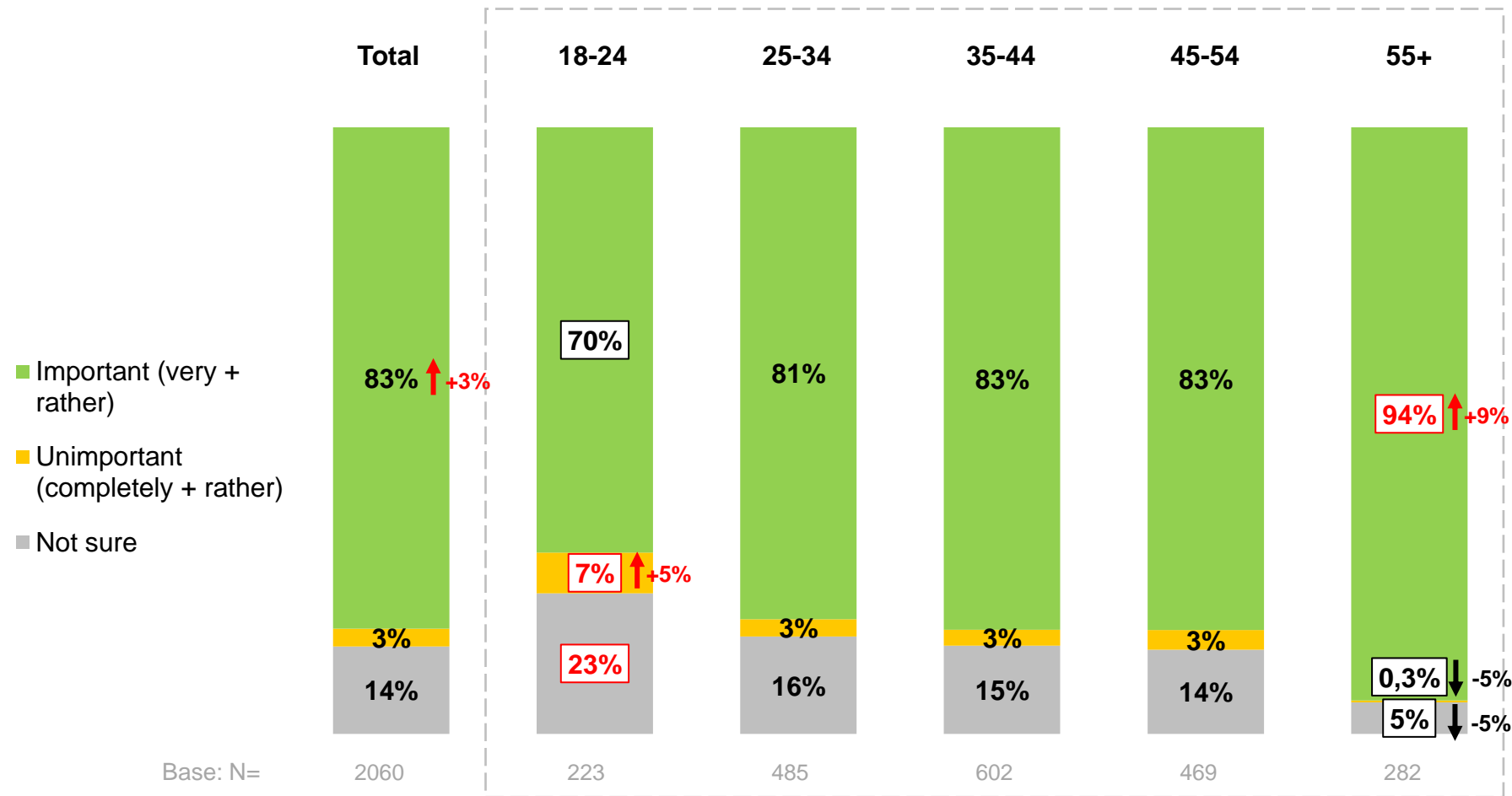


 Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study

Base: all respondents
 How important is the observance of the principles of democracy to you personally?



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

THE IMPORTANCE OF OBSERVANCE

of rule of law
by age



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

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

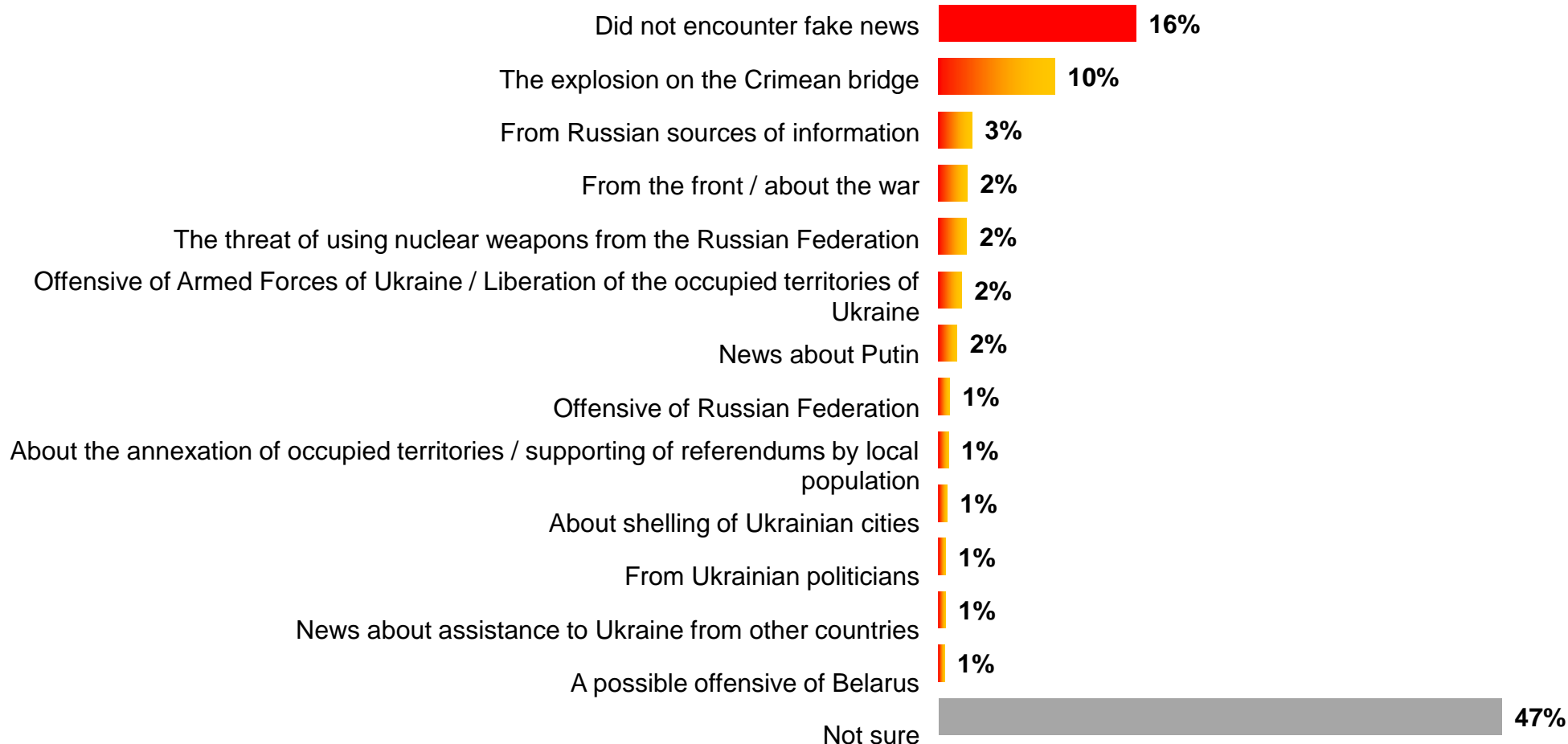
**LATEST NEWS:
KNOWLEDGE AND
PERCEPTION**



FALSE EVENTS

spontaneous answers

In an open-ended question, 53% of respondents found it difficult to answer the question about fake news which they encountered in the past week, and 15% indicated that they had not encountered such news. Misleading news that was encountered by the largest share of respondents - about the explosion on the Crimean Bridge (10%) and news from the Russian mass media (3%).



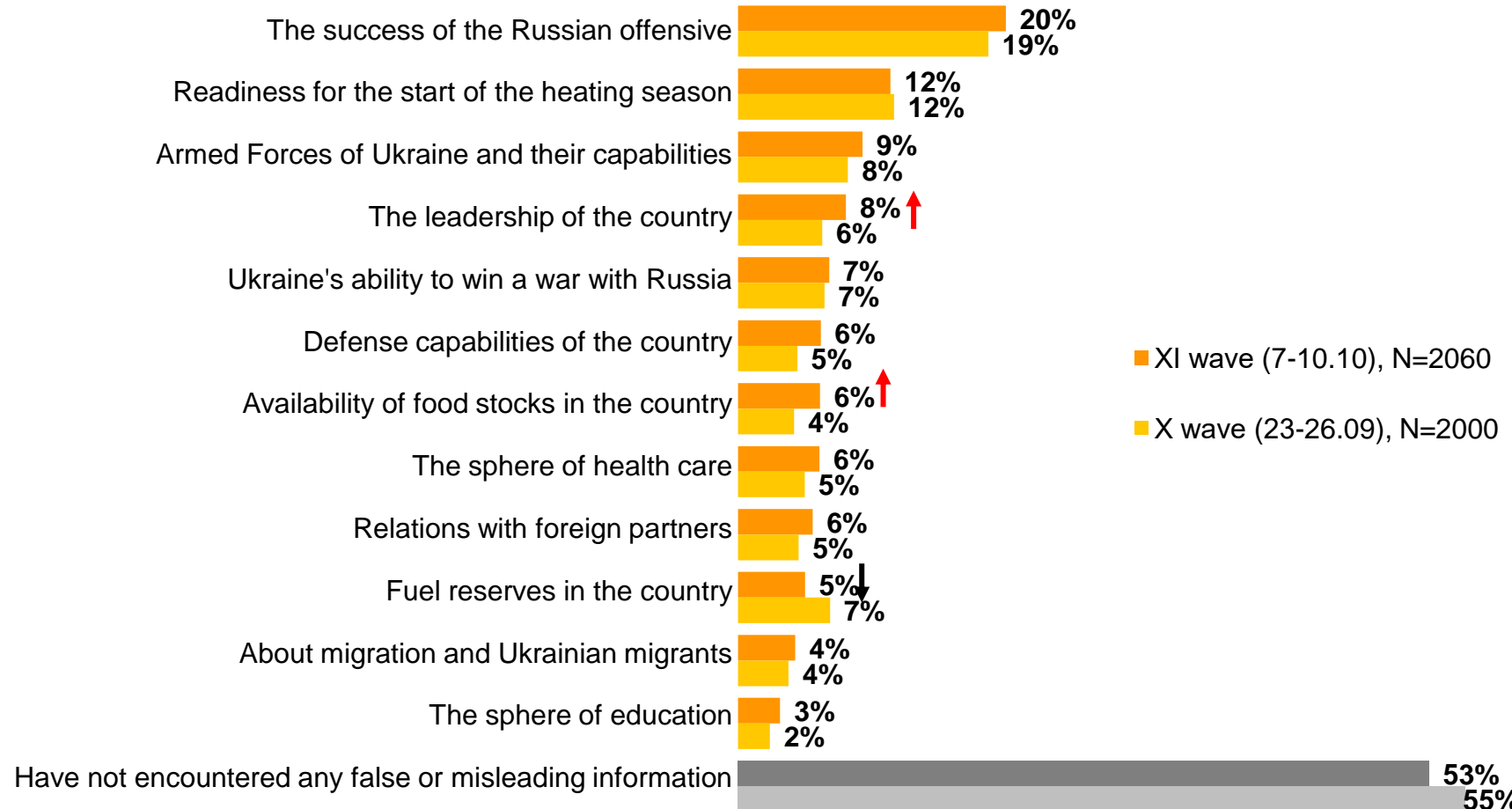
Base: all respondents, N=2060

Only the alternatives that have been mentioned in >2% of the cases have been shown on the slide.

Which of the news that you encountered in the media over the last week were false or misleading in your opinion? (open-ended question)

FALSE EVENTS REGARDING SPHERES



In a closed-ended question, 53% of respondents indicated that they had not encountered any false or misleading information regarding any of the spheres. Misleading news that was encountered by the largest shares of respondents was related to the success of the Russian offensive (20%) and readiness for the start of the heating season (12%).



Base: all respondents, N=2060

Only the alternatives that have been mentioned in >3% of the cases have been shown on the slide.

Have you encountered false or misleading information about any of these spheres in the past week? If so, what spheres did it concern?



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

MOST IMPORTANT NEWS OF THE LAST WEEK

spontaneous answers

The event of the last week which the largest share of respondents consider as the most important is the explosion on the Crimean Bridge (44%). Also, almost a quarter of respondents mentioned the offensive of the Armed Forces of Ukraine (22%).



Base: all respondents, N=2060

Only the alternatives that have been mentioned in >1% of the cases have been shown on the slide.

What events of the last week would you consider to be the most important? (open-ended question)

KNOWLEDGE OF THE EVENTS

The largest share of the audience is aware of the liberation of the territory in the East and South of the country by Armed Forces of Ukraine (71% and 70%, respectively), about the approval of the decision about the annexation of the Kherson, Zaporizhzhya, Luhansk and Donetsk oblasts by Russian parliament (64%), the approval of the decision of NSDO about the impossibility of negotiations with V. Putin by V. Zelenskyi (56%). The respondents know about the approval of the 8th package of sanctions against Russia by EU the least - 48%.

The Armed Forces of Ukraine liberate the territories in the East of the country
(Kharkiv and Luhansk oblasts) from Russia **71%**

The Armed Forces of Ukraine liberate the territory of the Kherson oblast from
Russia **70%**

The Russian Parliament approved a decision about the annexation of parts of
the Kherson, Zaporizhzhia, Luhansk and Donetsk oblasts **64%**

V. Zelenskiy approved a decision of the National Security Council about the
impossibility of negotiations with V. Putin **56%**

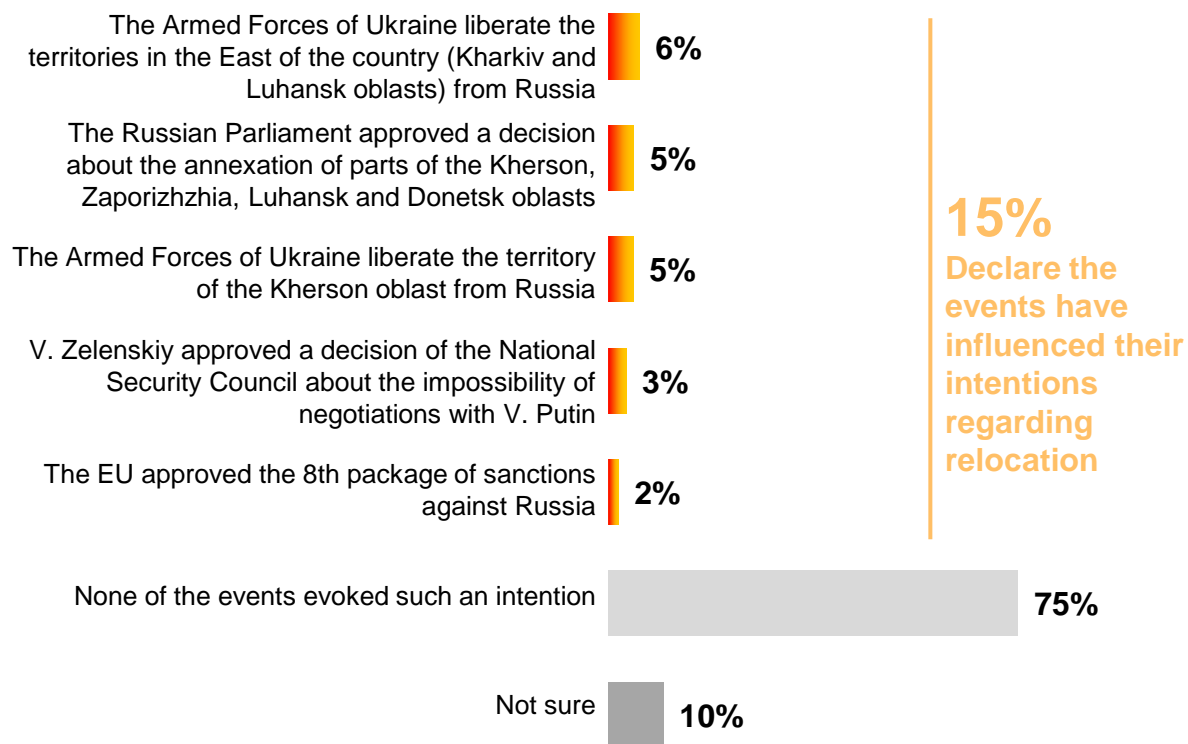
The EU approved the 8th package of sanctions against Russia **48%**

Not sure / Have not heard about any of these **11%**

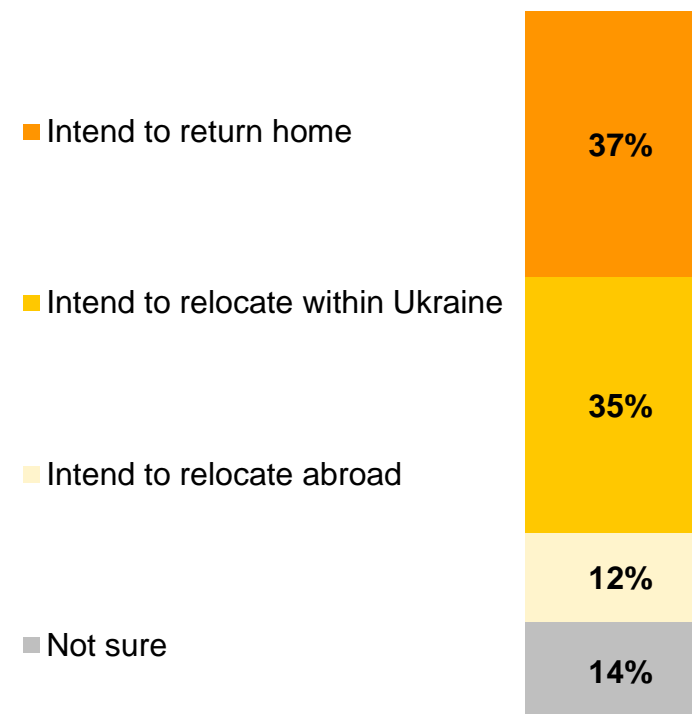
THE EFFECT ON RELOCATION PLANS AND DIRECTION OF PLANNED RELOCATION

For the majority of respondents (75%), there were no events that influenced their migration intentions. Whereas 15% indicated that at least one event influenced their intentions to relocate: 37% indicated that they intend to return to their permanent place of residence, 35% intend to migrate within Ukraine, and 12% - to relocate abroad.

The effect of the events on plans regarding relocation



Direction of relocation



Base: respondents who want to relocate because of these events, N = 268

Base: those who stayed in Ukraine and have heard about the aforementioned events, N = 1841

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

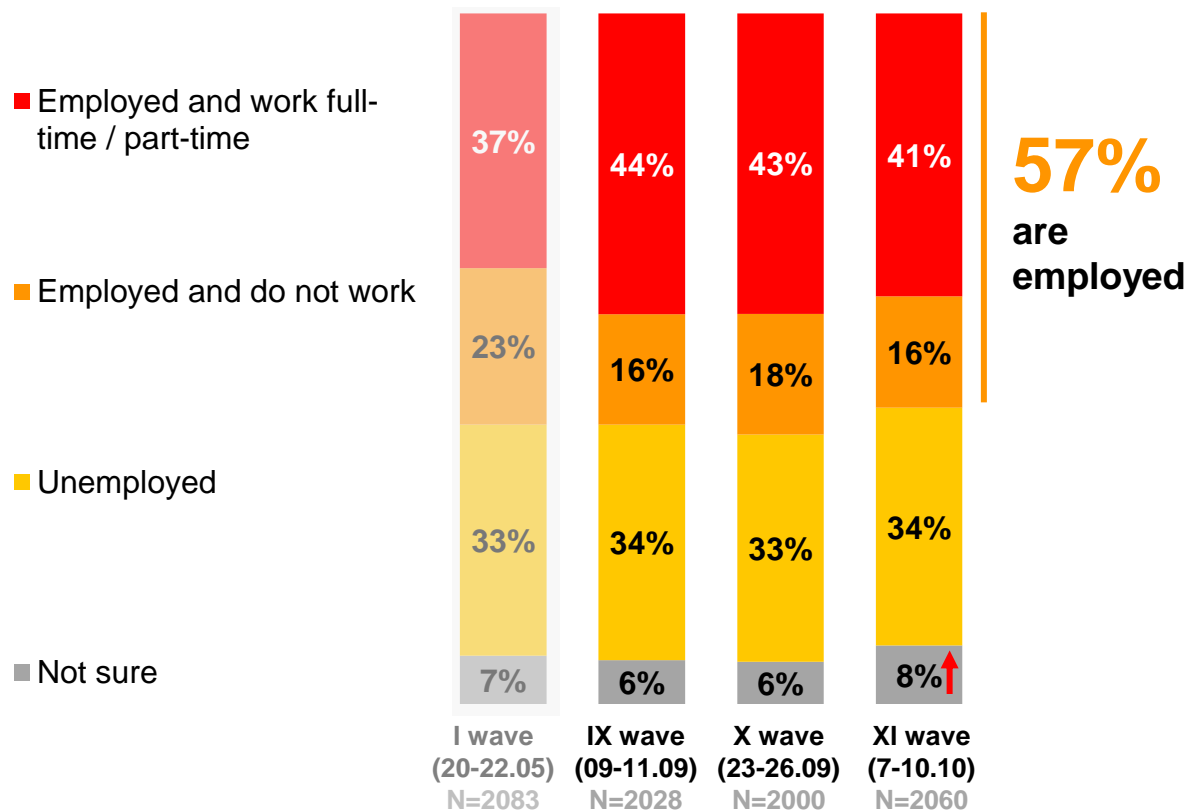
EMPLOYMENT DURING THE WAR



EMPLOYMENT DURING THE WAR

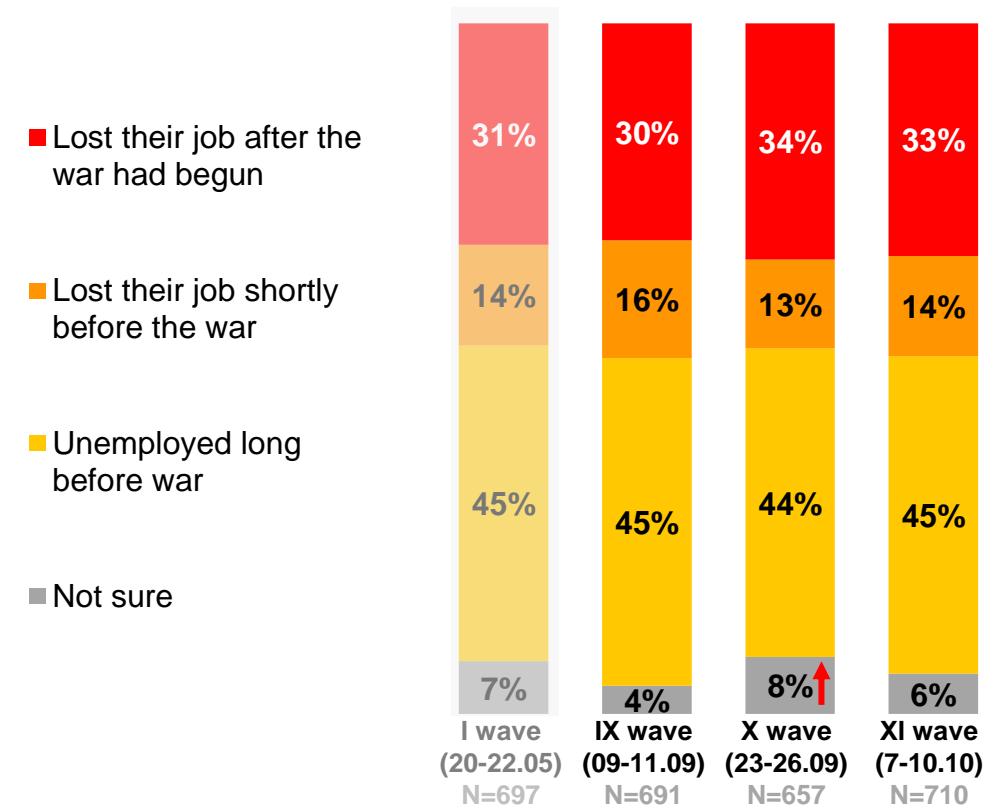
In the eleventh wave, there are no recorded changes regarding the work status of Ukrainians* – 57% have a job; 41% of them work full-time / part-time, and 16% do not work, despite their employment. 34% of Ukrainians* are unemployed - a third of them (33%) have lost their jobs since the beginning of the war, and 45% were unemployed long before the invasion.

Employment:



Base: all respondents

Unemployment specifics:



Base: unemployed respondents

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

Are you currently employed?

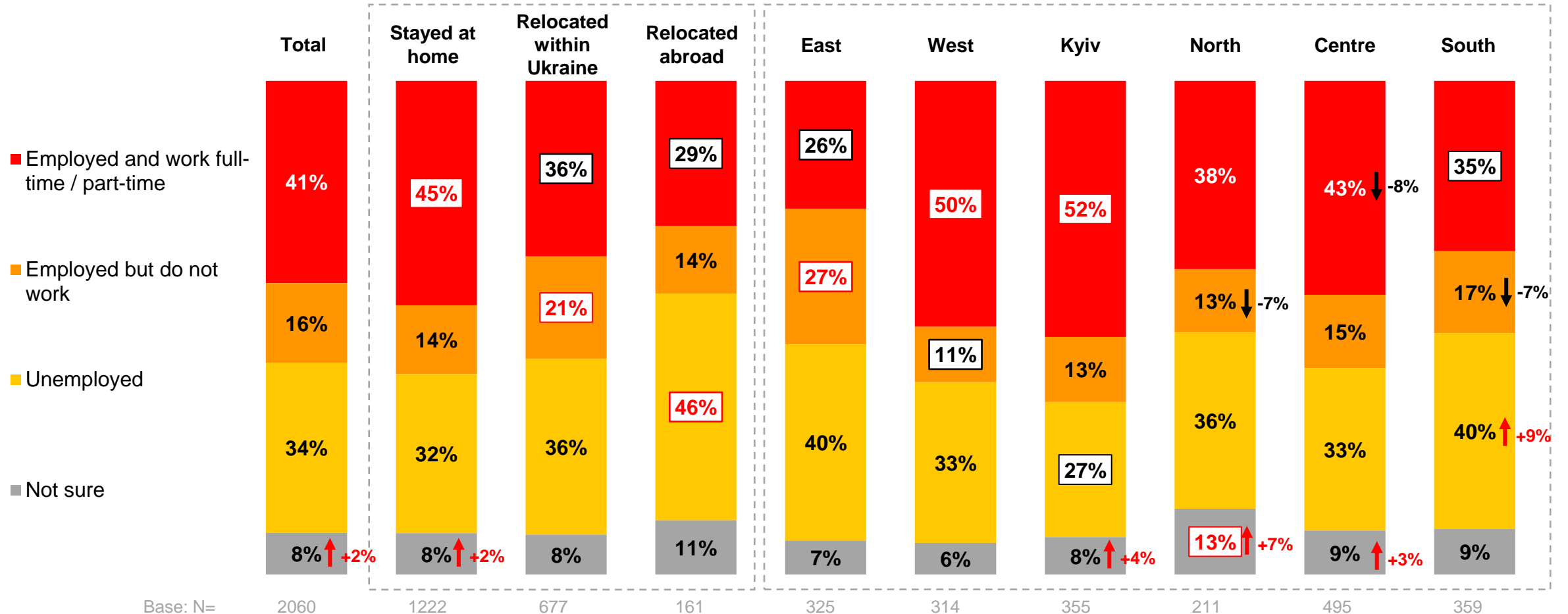
Which of the following phrases best describes your situation:

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

EMPLOYMENT DURING THE WAR

by migration status and region

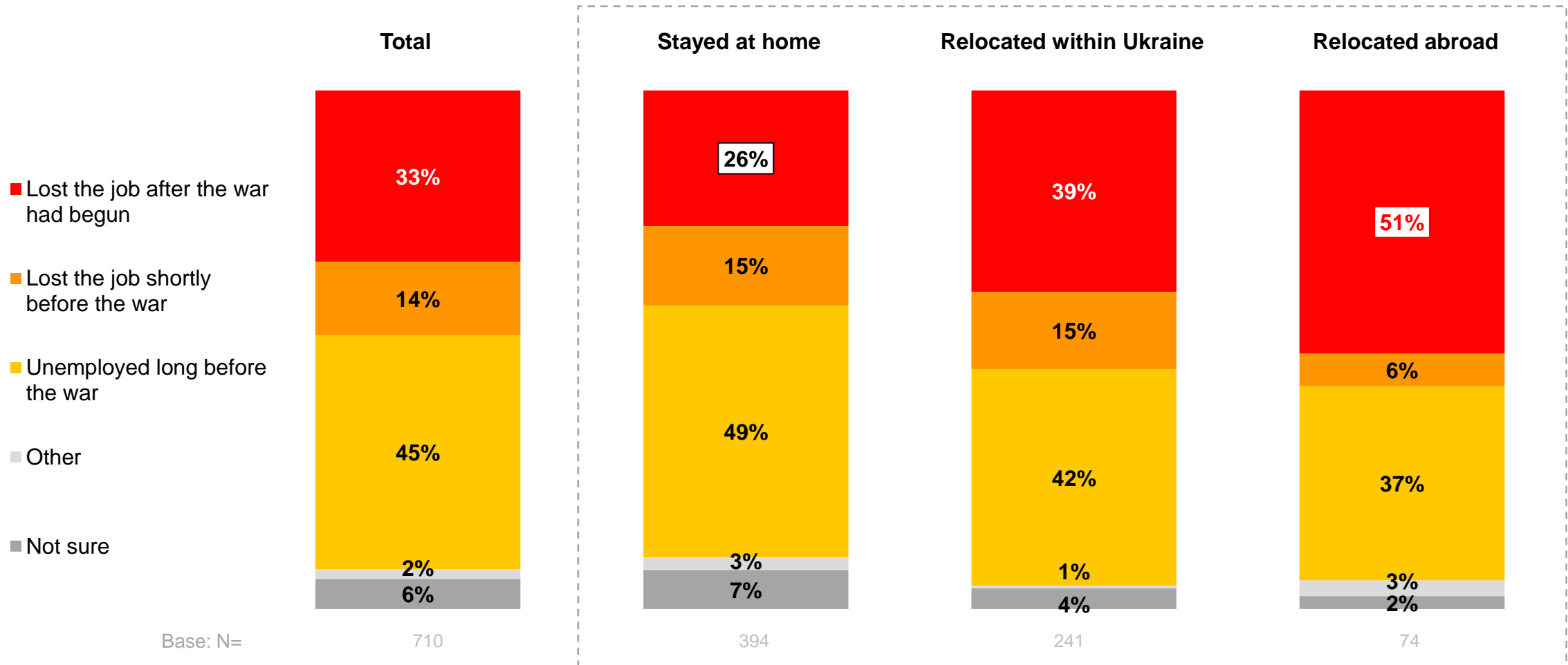
There is a significantly higher share of those who have a job and are actively working among those who stayed at home, as well as among residents of Kyiv and the Western region. The share of those who are not working despite their employment decreased among residents from the South and the North in the eleventh wave; there was also an increase in the number of unemployed people in the South, and a decrease in the share of actively working people in the Centre.




UNEMPLOYMENT SPECIFICS


by migration status

The highest share of those who have lost their jobs since the beginning of the war still remains among respondents who relocated abroad. There were no recorded significant changes compared to the previous wave.



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

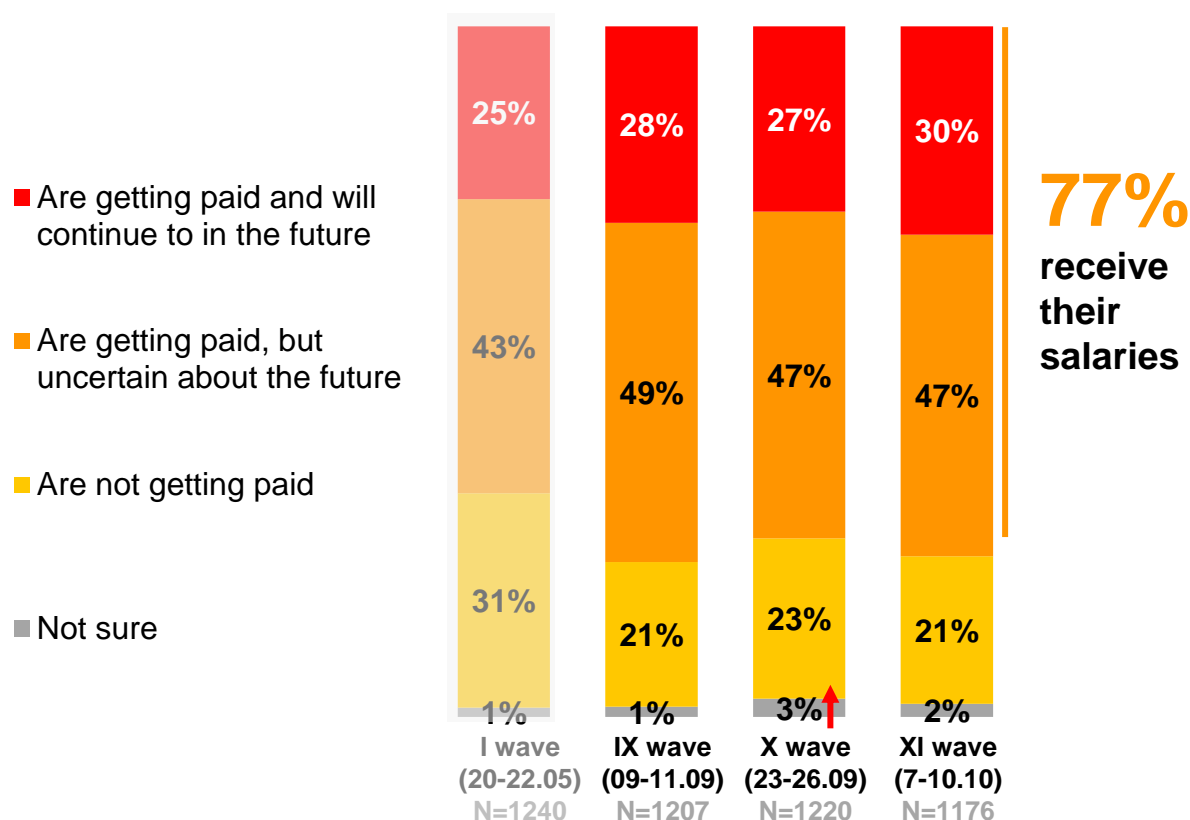
 Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

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

INCOME DURING THE WAR

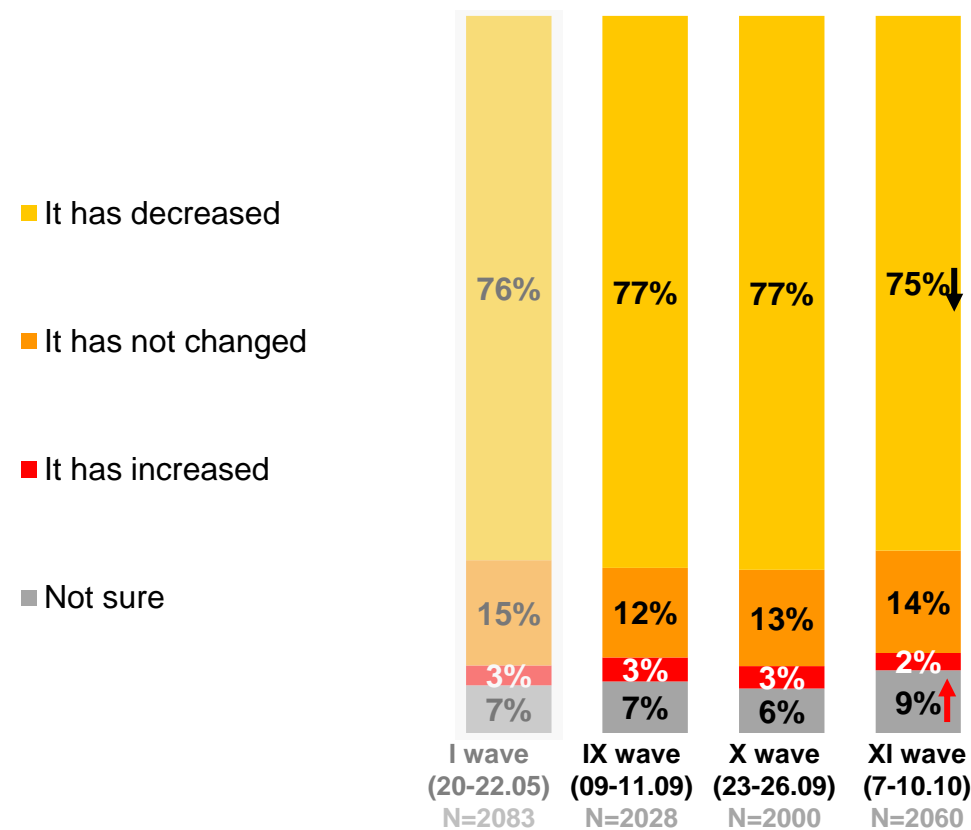
The majority of Ukrainians continue to declare a decrease in income since the beginning of the full-scale invasion (75%), and only 2% indicate that their income has increased; at the same time, there was a significant decrease in the percentage of those who declare a decrease in their income, while the percentage of those who find it difficult to assess the dynamics has increased. There were no recorded particular changes in the stability of income among the employed population - 77% continue to receive a salary; at the same time, almost half (47%) of employed people are not confident whether they will receive it in the future.

Income stability:




Base: respondents who are employed

Changes in income:



Base: all respondents

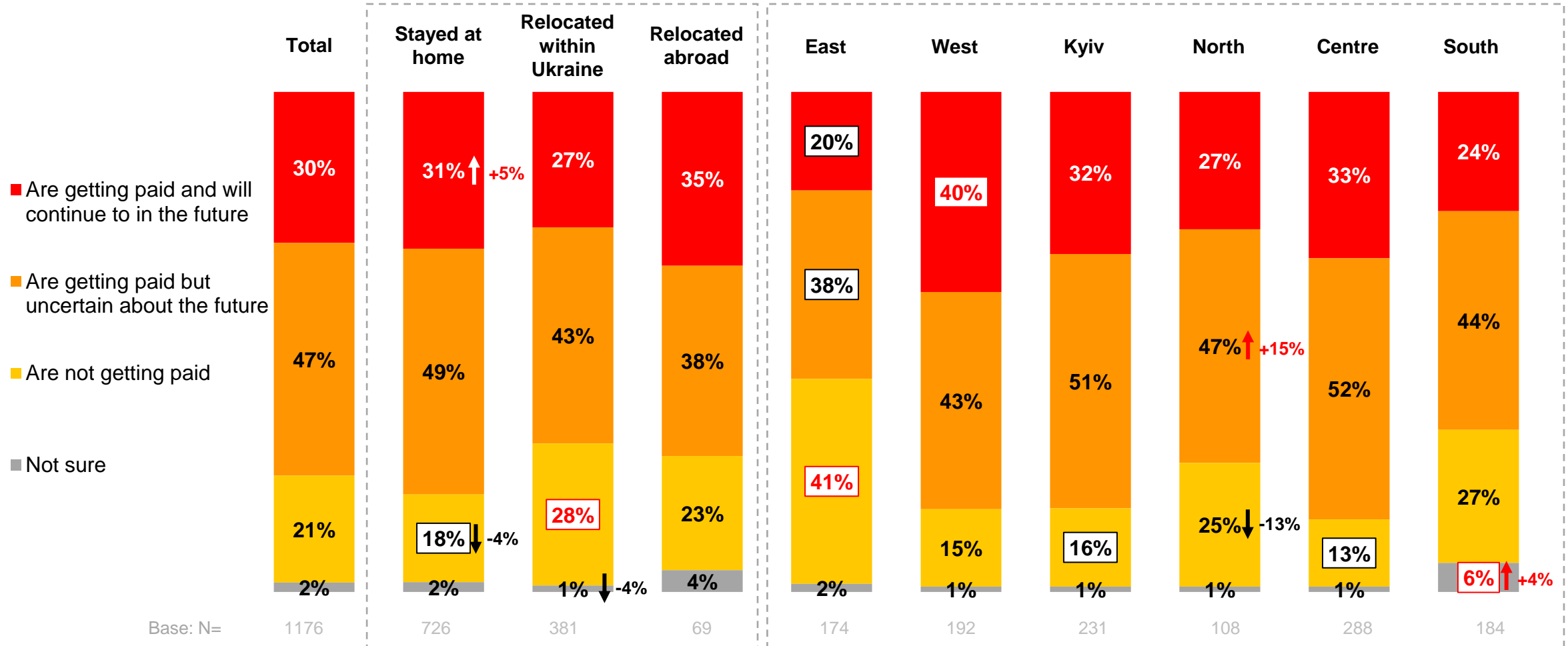
Do you receive salary?
How has your income changed since the full-scale war had begun?

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

INCOME DURING THE WAR

by migration status and region

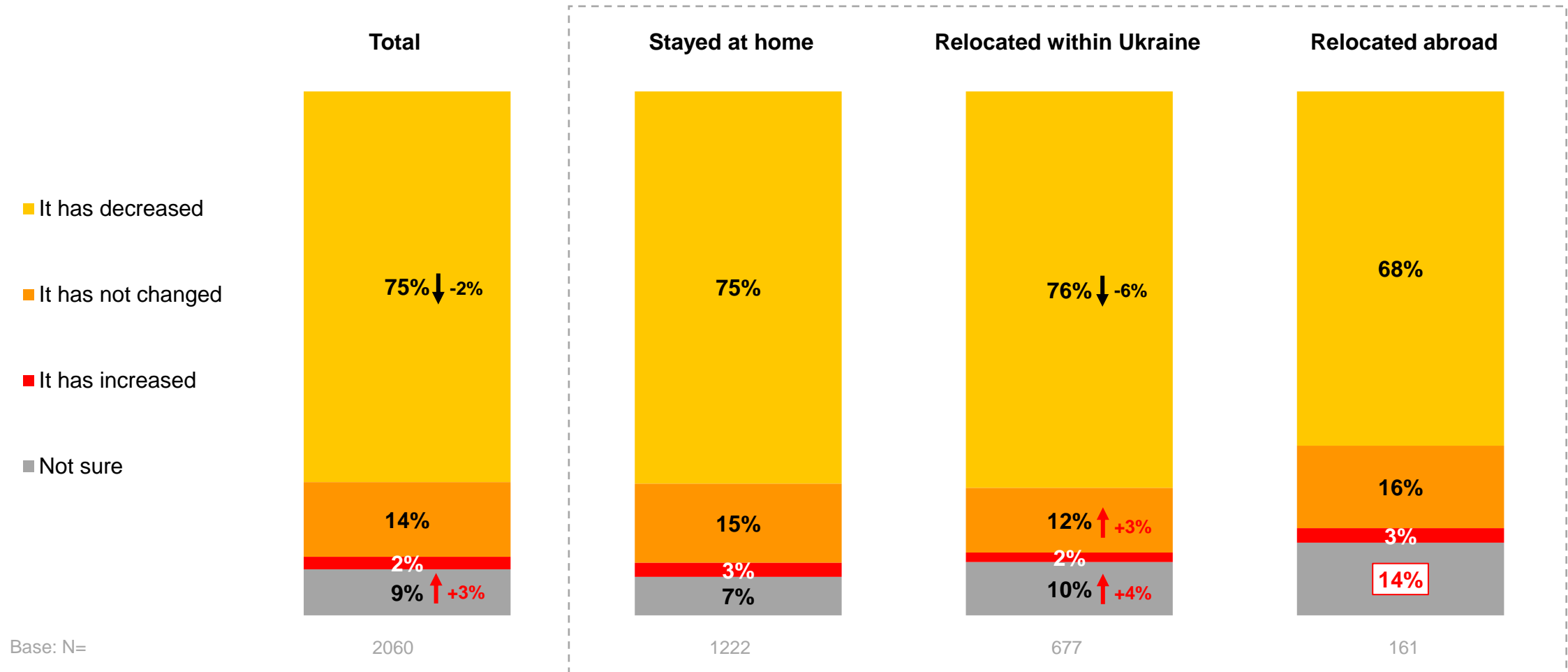
A significantly higher share of those who have confidence in receiving a salary in the future is recorded among residents of the West. Among those who stayed at home, there was an increase in the share of those who are confident in the stability of their income, and a decrease in the share of those who do not receive a salary at all. The latter is also characteristic to people from the North (due to the increase in the share of those who receive a salary and are not sure about the future).



INCOME CHANGES

by migration status

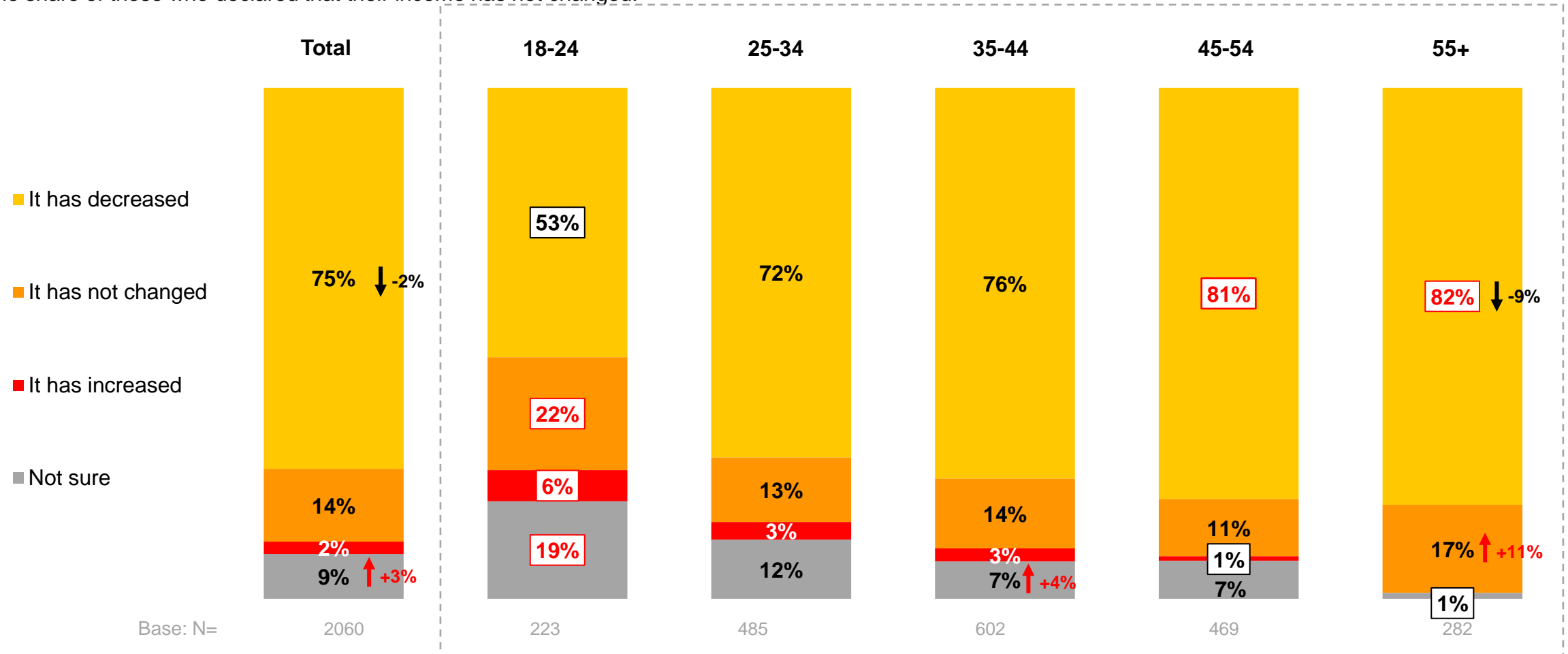
In the eleventh wave, there were no significant differences between migration groups when it comes to changes in income. Currently, a smaller share of those who relocated within Ukraine declare a decrease in their income.



INCOME CHANGES

by age

The largest share of those whose income has decreased was recorded among respondents over 45 years old, while the smallest - among 18-24 age group. At the same time, in the eleventh wave, there was a decrease in the share of representatives of the 55+ group whose income has decreased, and a corresponding increase in the share of those who declared that their income has not changed.

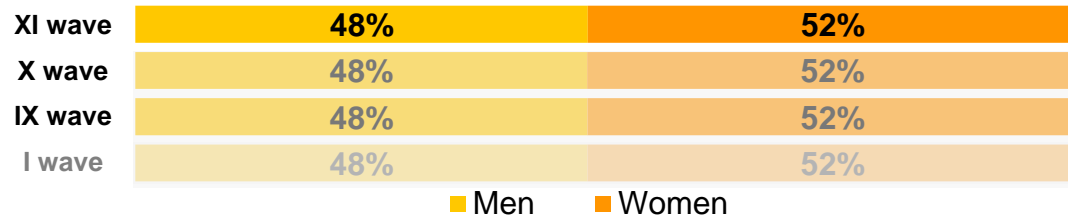


SAMPLE STRUCTURE

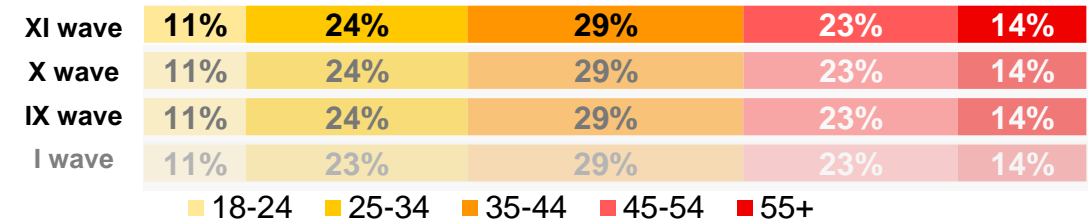


SAMPLE STRUCTURE

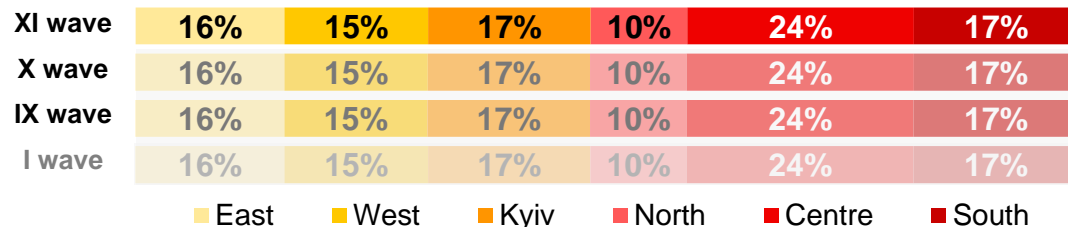
Gender



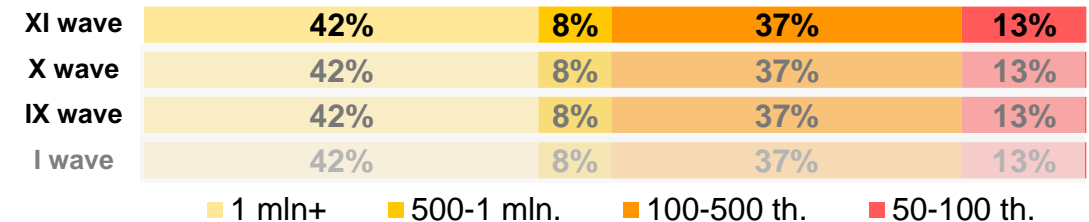
Age



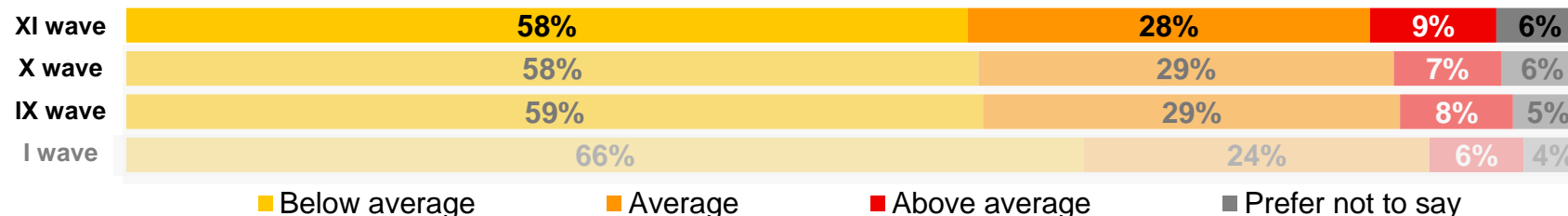
Region (before the war)



Size of settlement (before the war)

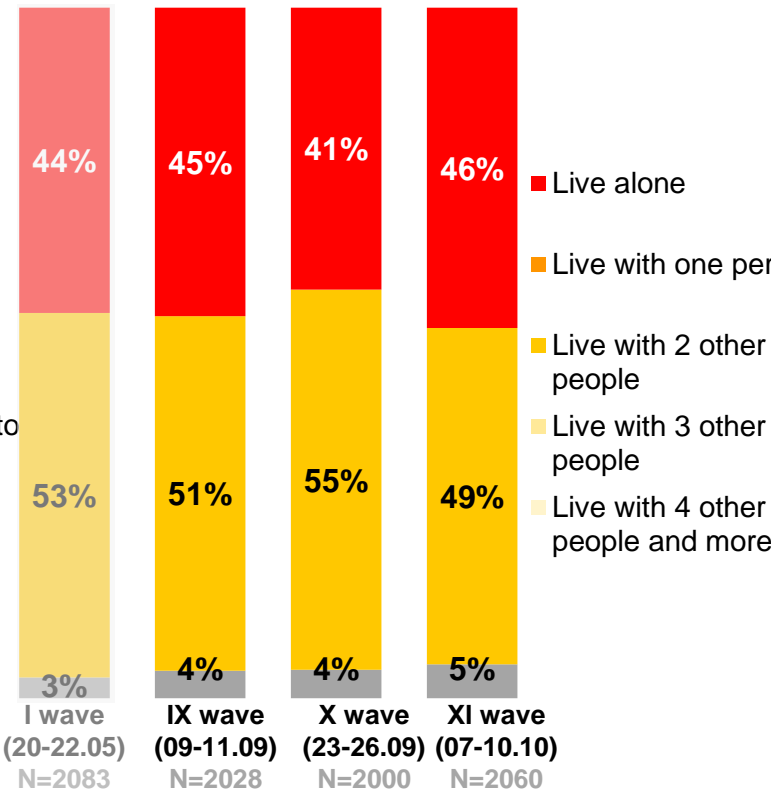
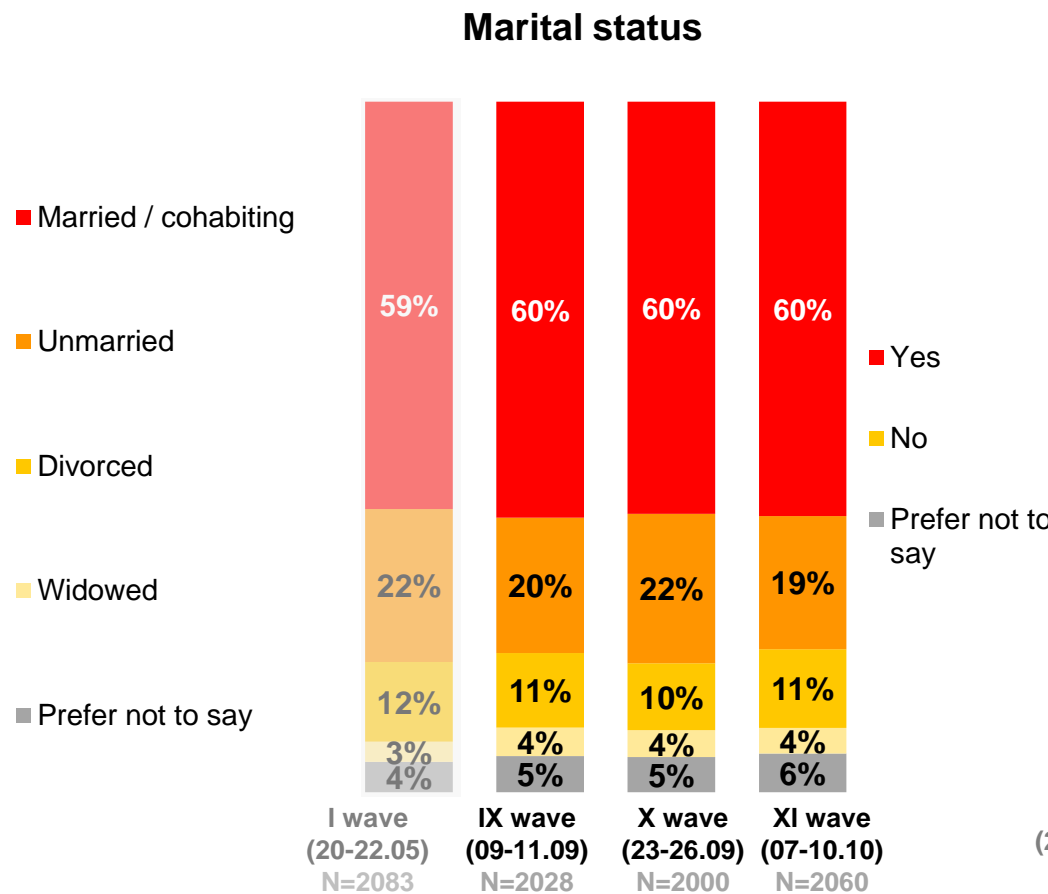


Income level

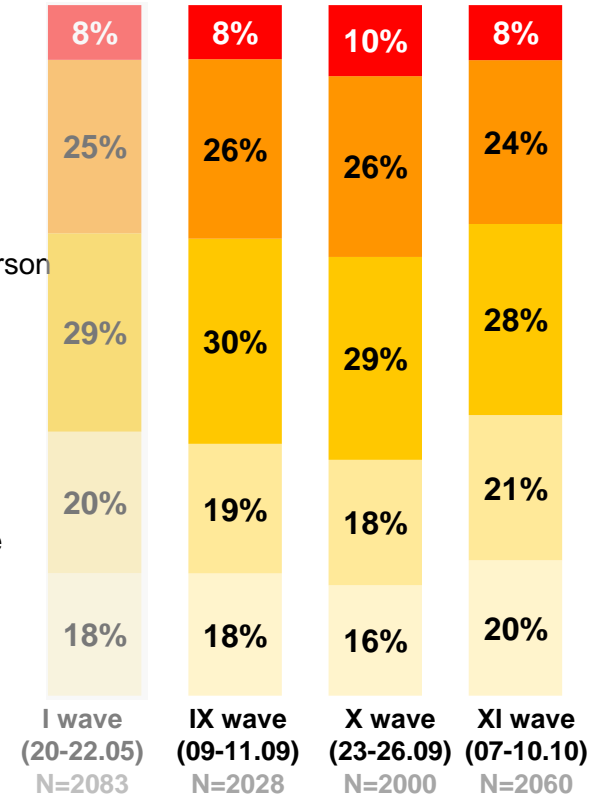


SOCIO-DEMOGRAPHIC PROFILE

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



Number of people who live in the household



SOCIO-DEMOGRAPHIC PROFILE

by migration status (XI wave)

		Total	Stayed at home	Relocated within Ukraine	Relocated abroad
Gender	Men	48%	48%	53%	31%
	Women	52%	52%	47%	69%
Age	18-24	11%	11%	10%	19%
	25-34	24%	21%	28%	23%
	35-44	29%	26%	35%	32%
	45-54	23%	27%	17%	15%
	55+	14%	16%	10%	12%
Region (before the war)	East	16%	7%	30%	22%
	West	15%	20%	8%	13%
	Kyiv	17%	15%	21%	17%
	North	10%	10%	11%	9%
	Centre	24%	32%	12%	18%
	South	17%	17%	17%	20%
Income level	Below average	58%	61%	54%	45%
	Average	28%	25%	29%	38%
	Above average	9%	8%	9%	12%
	Prefer not to say	6%	5%	7%	6%
Marital status	Married / cohabiting	60%	59%	63%	57%
	Unmarried	19%	19%	21%	17%
	Divorced	11%	12%	10%	11%
	Widowed	4%	4%	3%	4%
	Prefer not to say	6%	6%	3%	10%
Presence of children under the age of 18 who live with the respondents	Yes	46%	42%	52%	54%
	No	49%	53%	43%	42%
	Prefer not to say	5%	6%	4%	3%
Number of people who live in the household	Live alone	8%	10%	5%	9%
	Live with one other person	24%	26%	21%	21%
	Live with two other people	28%	26%	32%	24%
	Live with three other people	21%	19%	23%	27%
	Live with 4 other people and more	20%	20%	19%	20%
Base: all respondents		2000	1222	677	161
Base, N					



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



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