

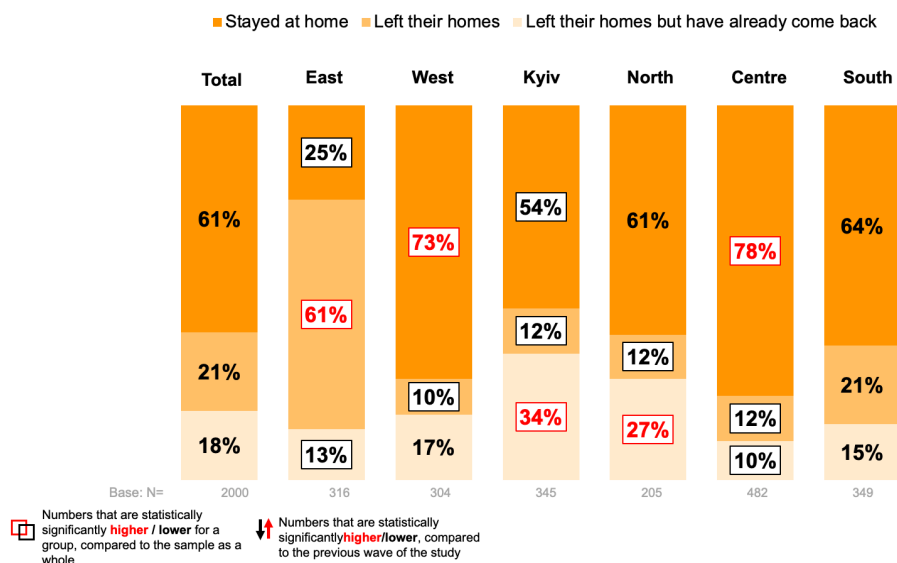
New audience for Ukrainian brands — how 4.6 million IDPs live in Ukraine: work, income, consumer trends — survey by Gradus Research

To help Ukrainian brands understand the new segment of consumers and find an approach to them, Gradus Research company conducted a large-scale study of the lives of internally displaced persons: places of residence, basic needs, employment, and changes in income and consumption. In general, according to official data of the Ministry of Social Policy of Ukraine only, the number of IDPs is 4.6 million as of October 3, 2022, and according to unofficial data, it is much bigger. And only by understanding the needs and realities of life of this large segment of the audience, businesses in regions where internally displaced persons currently live can turn them into their customers.

They mostly migrate from East to West

Residents of Eastern Ukraine migrate the most — 61%. As well as South residents, but with a significantly lower percentage — 21%. Residents of the West and Center more often stay at their permanent place of residence. And Kyivans and residents of the North more often declare returning home after temporary migration.

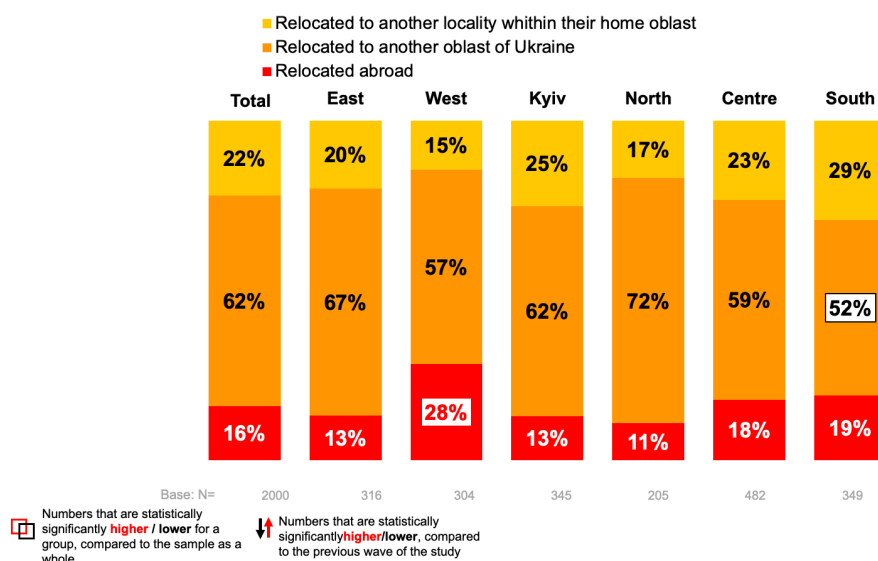
RELOCATION DUE TO THE WAR



1

Lviv region remains the most popular destination for internal migration, as do other regions of Western Ukraine in general.

DIRECTION OF RELOCATION



2

Many more need jobs and safe housing

65% need money — this number is similar to the number of those who remained at their permanent place of residence. However, as many as 40% need work, and 29% need safe housing. This is significantly more than among those who did not move (27% and 19%, respectively).

FAMILIES' NEEDS

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

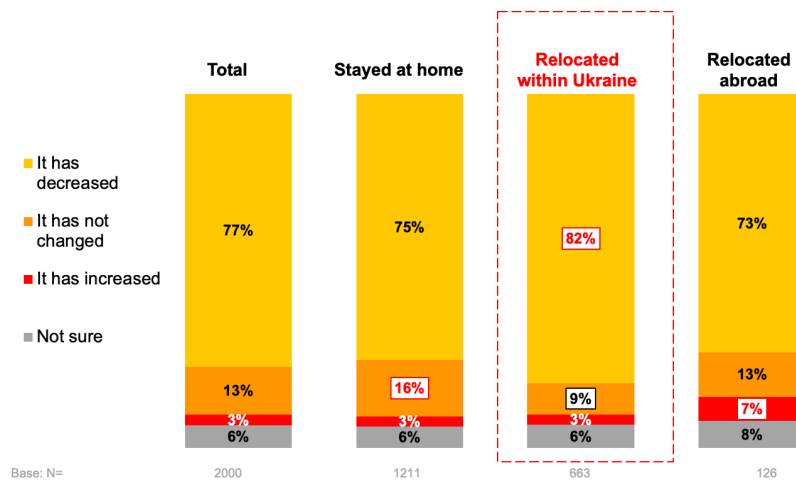
	Total	Stayed at home*	Relocated within Ukraine	Relocated abroad
Money	66%	68%	↓ -6% 65%	46%
Access to work	31%	27%	40%	31%
Safe place to live	23%	19%	29%	30%
Food	18%	18%	20%	↓ 9% 12%
Opportunity to go abroad	14%	13%	16%	↓ 6% 6%
Medications	12%	11%	17%	6%
Accommodation	12%	6%	23%	1%
Access to health services	10%	8%	13%	12%
Access to education	8%	7%	9%	7%
Base: N=	2000	1211	663	126

More often than other Ukrainians, they lose their jobs and income because of the war

Among IDPs, a much lower share of people has a job — 55% (compared to 66% among those who have not changed their place of residence). At the same time, 82% talk about a decrease in income due to the war — this is the highest indicator among all categories.

"The losses and needs actualized in internally displaced persons due to the war make them extremely motivated. After all, they want to get back to the way lived before. That is why employers have the opportunity to find an employee not only with good qualifications but also with an incentive to work well," comments Evgeniya Bliznyuk, CEO & Founder of Gradus Research.

Changes in income

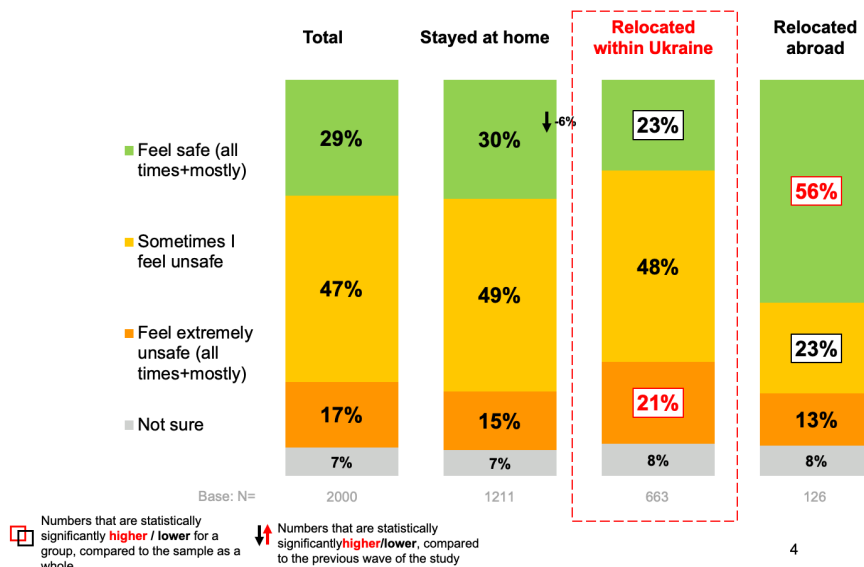


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More often they feel danger, but the attitude of the local population is assessed as friendly

The number of internally displaced persons who feel safe is much lower than among other audiences — 23%. However, 85% declare the friendly attitude of the local population towards them.

PERCEIVED SAFETY



4

They receive humanitarian aid, but the consumer basket does not differ from the rest of the population

52% of IDPs say they receive humanitarian aid from the state, this figure is higher than that of those who did not move (24%). Basically, they receive help in the form

of food products (77%), money (50%), and hygiene products (27%). At the same time, the basket of internally displaced persons has not changed — IDPs buy the same products as those who did not leave their homes due to the war.



Gradus

Changes in consumption

	Total	Stayed at home	Relocated within Ukraine	Relocated abroad
Ready-made meat products	74%	74%	73%	82%
Dairy products	69%	66%	72%	88%
Hygiene products	66%	64%	67%	79%
Mineral water	58%	58%	57%	65%
Sweetened carbonated drinks	45%	43%	47%	51%
Tobacco products	43%	44%	40%	38%
None of the above	4%			

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In general, we see that internally displaced Ukrainians experience more difficulties with finding a job, income, and housing, compared to citizens who remained in their permanent residence. However, the desire to return to the usual living conditions stimulates them to adapt faster and makes them an active segment of the audience whose needs and consumer preferences should definitely be got into account by brands.

The survey was conducted by Gradus Research company using the method of self-filling the questionnaire in the mobile application. The Gradus online panel displays the population structure of cities with more than 50,000 residents aged 18-60 by gender, age, settlement size, and region. Period of the survey: September 23-26, 2022, sample size: 2,000 respondents.