



Centre for
Economic
Recovery

Gradus Research
Company



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

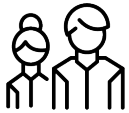
Analytical report

October 2022

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



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



Target audience of the study: men and women, aged 18+, who lived in Ukrainian cities with a population of 50 thousand and more at the moment when the war began.



Number of successful interviews:

I wave – 2083	VI wave – 2009	XI wave – 2060
II wave – 2045	VII wave – 2005	XII wave – 2000
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	XII wave – October 21 – October 24
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 twelfth wave, the distribution of Ukrainians* by migration status remains without significant changes, compared to the previous wave: 62% of respondents **remained at their permanent place of residence** (more often these are residents of the West 80% and the Centre 77%). The rest (37%) of the audience **changed their place of residence**. Among **those who migrated**, 17% have already **returned home** (more often these are the residents of Kyiv and the North – 32% and 27%), and 20% **continue to be far from home** (mostly 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), while 19% – **relocated to other localities within the oblast**, and also 19% **went abroad** (mainly to Poland and Germany).
- **The distribution of the desire of Ukrainians* who remained in Ukraine to migrate in the event of an aggravation of the situation in the current wave remains at the level of the indicators of the eleventh wave:** the vast majority (62%) of respondents want to stay at their current place of residence, while 19% have a desire to migrate within Ukraine, and 10% want to relocate abroad. At the same time, in the current wave, **the share of those who declare that they do not have an opportunity to migrate** in the event of an aggravation has increased (from 45% to 49%). The rest of respondents (45%) have such an opportunity: 28% – to migrate within Ukraine, and 17% – to migrate abroad.
- The share of those who want to **return home at the first opportunity** among persons who went abroad and have not yet returned (67%) remains at the level of indicators of previous waves. At the same time, the share of people who hesitate to assess their opportunity to continue to stay abroad has increased (from 8% to 24%). In general, 58% of respondents have the opportunity to stay and live abroad, while 18% do not have it.
- **Safety** in the settlement and, on the contrary, its absence remain the biggest **driver** (60%) and, accordingly, a **barrier** (79%) to the **return to Ukraine of those who went abroad**.
- 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 72%, and the share of those who want to stay is 16%; 54% have the opportunity to stay and live in their new place (the indicator is gradually increasing in recent waves), and 36% do not have it.
- In the current wave, there were no significant changes in the share of those who declare **the involvement of their family members** in the Armed Forces of Ukraine (24%) and Territorial Defense Forces (14%). The level of involvement in volunteering also remained without significant changes – 21%.

* 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

- The ranking of the most important needs of Ukrainians* remains unchanged – money (64%) and access to work (30%) are deemed most important.
- As for **subjective assessments of the state of physical and mental health**, they remain at the level of the last two waves: the largest share (47%) of respondents declare the presence of some problems with physical health; with regard to mental health, there were almost equal shares of those who indicated the presence of some problems (44%) and those who did not have them (42%).
- As for the feeling of safety, **about half** (49%) of the respondents continue to **feel unsafe from time to time**, while only a quarter of the respondents currently feel safe (the indicator has decreased by 5 percentage points compared to the previous wave), and 19% **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 86% of the respondents.
- **Humanitarian aid** from the Ukrainian state was received by 35% of respondents (67% – among residents of the East, 44% – among residents of the North, and 41% – among residents of the South) and this indicator is stable in the current wave. Mainly, it remains **in the form of** food (76%) and money assistance (43%). Among those who received humanitarian aid, 48% consider it **sufficient** and 43% – insufficient (there is a tendency of the increase of evaluation of aid as sufficient).
- When it comes to the **external migrants**, 67% of them **received humanitarian aid** from the government of the country to which they relocated. Mostly, this was money assistance (82%), temporary housing (59%), food (59%), hygiene and sanitation products (51%), and clothes (48%). At the same time, the majority of respondents (82%) evaluate this assistance as sufficient.

Energy situation

- **More than half** (64%) of Ukrainians* who are currently in the country **encountered power outages in recent days**, with 64% of them noting that such outages lasted up to 4 hours on average (29% – up to 2 hours, and 35% – 3-4 hours).
- In the case of a power outage in the cold season, 65% of respondents will remain in their current place of residence.
- As for the heating situation, the majority (55%) of respondents declare that the heating of their homes depends exclusively on the central heating, while 33% report that the heating of their houses depends exclusively on autonomous heating, and 5% have the opportunity to use both. About half (48%) of those who only have central heating say that there are no alternative ways of heating their home, while those who do have an alternative way say that it is mostly electric heaters (48%).
- As for the temperature in the homes of Ukrainians*, the existing average (reported) temperature of the accommodation is significantly lower than the temperature that the respondents consider comfortable for themselves – 17.7°C vs 21.2°C.
- The schedule of power outages is the most needed practical information – 42% of respondents feel the lack of it.

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

SUMMARY (3/4)

Perception of the full-scale war with Russia

- In the twelfth 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 **remain at a high level**: 66-71%. The assessment of the Ukrainian authorities' actions in the spheres of the economy also has not changed significantly: almost half (47-49%) of respondents consider such actions to be effective. The evaluation of the effectiveness of the authorities' actions with regard to aiding those who lost their jobs (31%) and property (36%) has not changed as well.
- **In general, the largest shares of respondents continue to trust the Armed Forces of Ukraine (65%) and the President of Ukraine (47%).** Trust in the Armed Forces of Ukraine has not changed significantly, moreover, it is at the highest level for all waves of the study. The level of distrust in all institutions from the list also remains unchanged.
- **A stably high percentage of Ukrainians* are optimistic about the future** – 64% believe that Ukraine will be able to build a strong economy, 63% – that Ukraine will become a member of the European Union by 2030, and 59% of respondents are confident that the state will rebuild everything that was destroyed after the war (or will 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 precisely with regard to the value of life. **The value of implementing superiors' orders remains the most controversial** in perception: the percentage of those who disagree with the statement about its importance has increased (although such people are in the relative minority, as in the previous wave). Older people (55+) believe in the importance of life, human freedoms and rights, mutual assistance and trust, as well as social harmony the most; at the same time, among them, there was a significant decrease (by 9 p.p.) in the share of those who value implementation of superiors' orders (thus, the indicator somewhat evened out after the growth in the previous wave).
- **The importance of observance of the equality between people, the principles of freedom, democracy, the rule of law, respect for human dignity and human rights is consistently high** and is at the level of 80-95%. Among the principles, the most widely supported are respect for human dignity (this indicator has increased significantly in the current wave) and human rights, while the rule of law is supported the least. The general tendency is preserved: the older people are, the more they unconditionally believe in the importance of all these principles.

SUMMARY(4/4)

Latest news

- **Almost half** (47%) of the respondents reportedly **encountered fake news** in the last week. These news primarily was about the success of the Russian offensive (19%) and readiness for the heating season (14%).
- The offensive of the Armed Forces of Ukraine / the liberation of the territories of Ukraine (17%) and the shelling of Ukrainian cities (12%) **are the most important events** of the last week that were spontaneously mentioned by the respondents.
- The most important events that the respondents mentioned when prompted are emergency and planned power outages because of the shelling of a large part of Ukraine's energy infrastructure (74%), and Russia's use of Iranian Shahed drones to attack Ukraine's civilian infrastructure (72%). As for other events of the week, 65% of respondents know about Russia's imposition of martial law in the recently annexed oblasts of Ukraine. Smaller shares of respondents know about the release of 108 women from Russian captivity (62%), about the increase in the number of Russian soldiers on the territory of Belarus due to which the risk of a new offensive from the territory of Belarus increases (60%), and about Zelensky's statement on Russia's mining of the Kakhovska HPP dam with the possibility of its subsequent detonation (60%).
- **The majority** (70%) of respondents **declare the lack of influence of recent events on their migration intentions**. Whereas 18% indicated that these events made them intend to relocate. As for migration, 46% indicated that they intend to migrate within Ukraine, 24% intend to relocate abroad, and 15% want to return to their permanent place of residence.

Employment during the war

- **57% of surveyed Ukrainians* have a job** – there are significantly larger shares of employed people among residents of the Western, Central region, and Kyiv.
- The majority of employed people continue to receive a salary (81%), and a third (33%) are confident that they will continue to receive it in the future (the indicator has been increasing at the level of the trend of the last three waves). Residents of the Western region are significantly more confident in the stability of their income (45%).
- **78% of respondents declare a decrease in their income since the beginning of the full-scale invasion** – this is significantly more (by 3 percentage points) than in the previous wave. The smallest share of those whose income has decreased since the beginning of the war is among respondents who went abroad. When it comes to age differences, the largest shares of those whose income has decreased were recorded among respondents aged 45+; also, the corresponding share has increased among respondents aged 35-44.

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

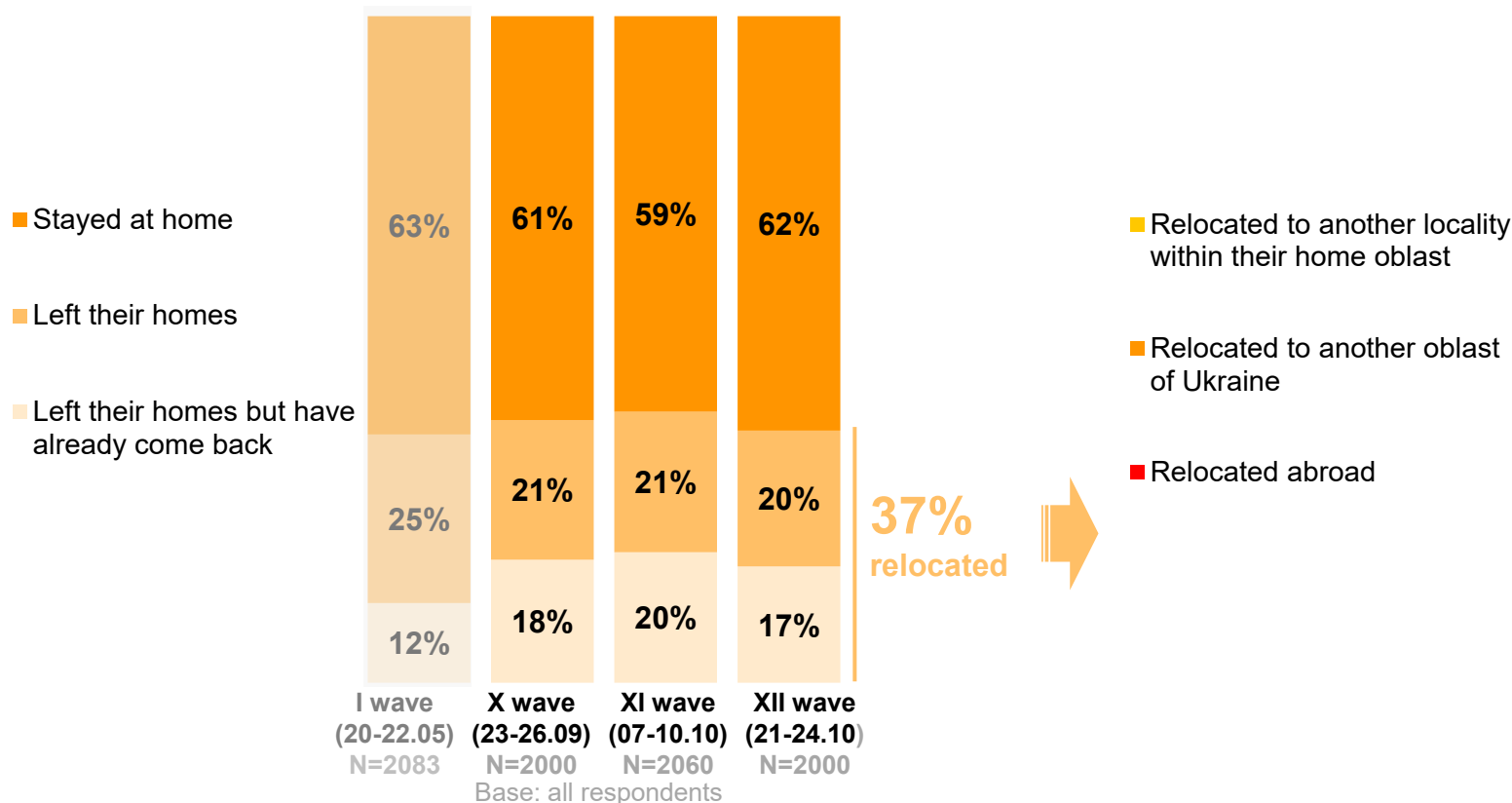
UKRAINIANS'* ACTIONS DURING THE FULL-SCALE WAR

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

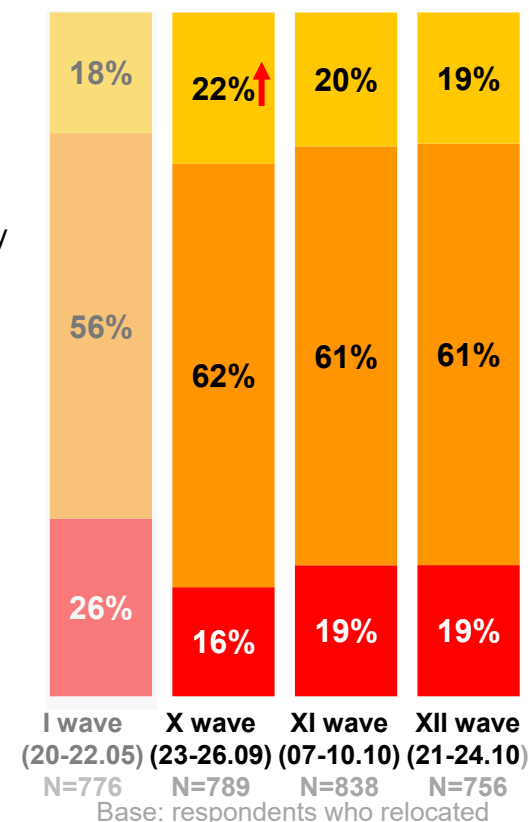
RELOCATION OF UKRAINIANS* DUE TO THE WAR

Compared to the previous wave, the distribution of migration processes remained without significant changes: 62% of respondents claim that they stayed at home, 37% - that they changed their place of residence (17% of them have already returned to their permanent place of residence). In the twelfth wave, there also were no recorded changes in the directions of relocations: majority (61%) migrated to another oblast, while 19% migrated within the oblast, and 19% went abroad.

Relocation of Ukrainians* due to the war





Relocation specifics



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

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

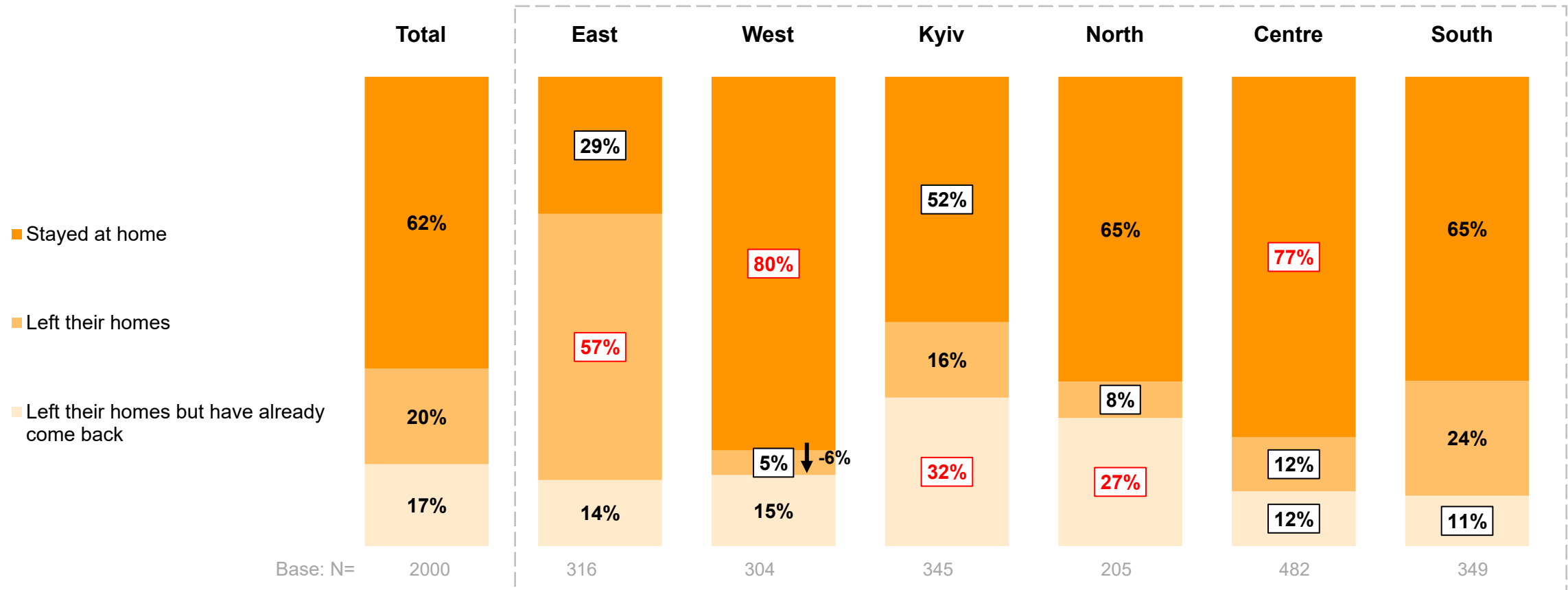
In which direction were you forced to move:



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

RELOCATION DUE TO THE WAR

by regions

In the current wave, there were no recorded significant changes in migration processes among different regional groups (the exception is a decrease in the share of people who left their homes among residents of the West). In general, residents of the West and Centre stayed at their permanent place of residence more often. Whereas among the residents of the East, there is the largest share of those who left their homes; residents of Kyiv and the North more often declare returning home after temporary migration.



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

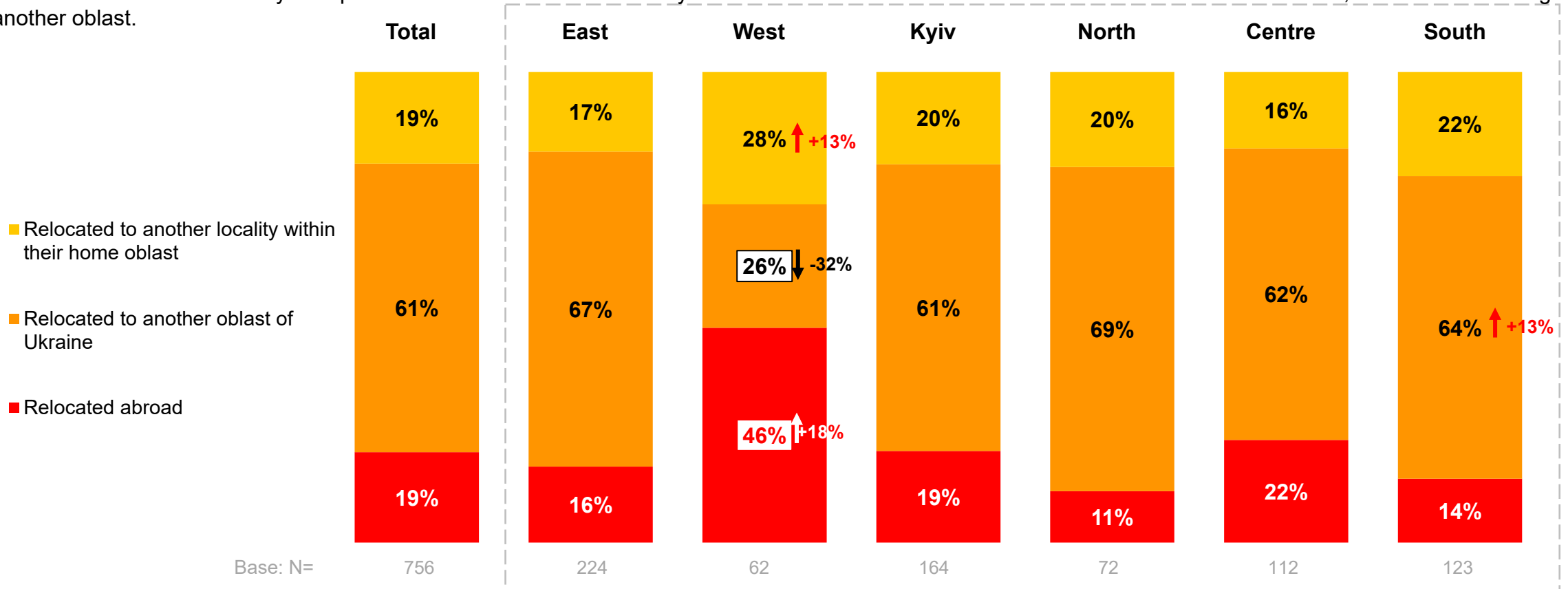
Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

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

DIRECTION OF RELOCATION

by region

Compared to the previous wave, there were recorded significant differences regarding the directions of relocation among residents of the Western and Southern regions. Among the residents of the West, there was an increase in the share of those who migrated abroad and within the region in which they permanently live, and there was a decrease in the share of those who relocated to another oblast. Whereas among the residents of the South, the share of people who relocated to another oblast has increased. As for regional peculiarities, they become less noticeable: indicators of the East, Kyiv, North, Centre, and South do not statistically differ from the indicators of Ukraine* as a whole. The only exception is residents of the West - they declare about relocation abroad more often than other Ukrainians*, and less often - migration to another oblast.



*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.

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

		Oblast from which relocated																		
		Total	Kyiv city	Donetsk oblast	Kharkiv oblast	Dnipropetrovsk oblast	Zaporizhzhia oblast	Kherson oblast	Chernihiv oblast	Luhansk oblast	Kyiv oblast	Odesa oblast	Mykolaiv oblast	Poltava oblast	Cherkasy oblast	Kirovohrad oblast	Sumy oblast	Vinnitsia oblast	Zhytomyr oblast	Lviv oblast
Oblast to which relocated (TOP-18)	Lviv oblast	13%	13%	9%	8%	19%	9%	21%	0%	0%	16%	43%	0%	20%	0%	0%	63%	14%	15%	0%
	Zakarpattia oblast	9%	13%	4%	3%	10%	2%	0%	2%	28%	20%	5%	0%	0%	0%	61%	0%	0%	69%	18%
	Kyiv city	7%	0%	12%	17%	7%	0%	14%	3%	24%	0%	6%	0%	16%	0%	0%	0%	0%	0%	0%
	Cherkasy oblast	7%	7%	7%	2%	0%	2%	0%	63%	4%	3%	0%	15%	7%	0%	9%	0%	0%	0%	18%
	Ivano-Frankivsk oblast	7%	7%	2%	9%	9%	7%	15%	0%	0%	19%	20%	0%	0%	0%	0%	13%	10%	0%	0%
	Khmelnytskyi oblast	6%	10%	2%	1%	19%	20%	0%	0%	0%	0%	0%	0%	0%	11%	0%	0%	18%	9%	13%
	Dnipropetrovsk oblast	6%	2%	22%	3%	0%	22%	0%	0%	11%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
	Ternopil oblast	5%	8%	9%	2%	0%	0%	6%	4%	0%	18%	0%	8%	7%	7%	0%	0%	0%	0%	0%
	Kyiv oblast	5%	0%	9%	4%	0%	2%	17%	16%	11%	0%	0%	7%	0%	0%	9%	18%	0%	7%	16%
	Vinnitsia oblast	5%	10%	8%	3%	2%	4%	6%	0%	0%	4%	5%	0%	0%	0%	0%	0%	0%	0%	12%
	Rivne oblast	5%	2%	2%	1%	13%	2%	7%	0%	0%	0%	8%	0%	31%	39%	12%	0%	0%	0%	11%
	Zhytomyr oblast	5%	10%	4%	0%	6%	0%	5%	2%	0%	7%	0%	0%	9%	0%	0%	0%	40%	0%	0%
	Chernivtsi oblast	4%	3%	0%	10%	5%	4%	0%	9%	0%	6%	12%	0%	9%	7%	9%	0%	0%	0%	0%
	Poltava oblast	4%	2%	3%	22%	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	7%	0%	0%	0%
	Odesa oblast	3%	1%	3%	0%	2%	2%	0%	0%	11%	0%	0%	57%	0%	0%	0%	0%	0%	0%	0%
	Volyn oblast	3%	1%	1%	2%	2%	22%	0%	2%	0%	4%	0%	0%	0%	0%	0%	0%	18%	0%	12%
	Kirovohrad oblast	3%	1%	2%	4%	2%	0%	8%	0%	5%	4%	0%	13%	0%	36%	0%	0%	0%	0%	0%
	Chernihiv oblast	2%	6%	0%	4%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Base: respondents who relocated to another oblast of Ukraine		464	100	67	66	38	26	24	23	17	15	15	14	8	8	7	6	6	6	5

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

* Insufficient base for analysis
(observation of trend)

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

MIGRATION DESTINATIONS

abroad

Poland and Germany remain the most common destinations of emigration.

		Oblast from which relocated								
		Total	Kyiv city	Donetsk oblast	Dnipropetrovsk oblast	Kharkiv oblast	Odesa oblast	Zakarpattia oblast	Lviv oblast	Volyn oblast
Country to which relocated (TOP-16)	Poland	20%	15%	5%	37%	4%	0%	0%	47%	32%
	Germany	19%	15%	46%	24%	13%	41%	0%	13%	0%
	Czech Republic	7%	3%	0%	4%	4%	0%	68%	0%	0%
	Italy	6%	6%	0%	14%	0%	0%	0%	20%	0%
	France	4%	2%	0%	0%	11%	0%	0%	0%	0%
	Spain	4%	2%	9%	6%	0%	0%	0%	0%	0%
	Austria	4%	4%	5%	0%	0%	26%	0%	0%	20%
	Bosnia and Herzegovina	3%	0%	0%	0%	26%	0%	0%	0%	0%
	Belarus	3%	11%	0%	0%	0%	0%	0%	0%	0%
	Belgium	3%	9%	0%	0%	8%	0%	0%	0%	0%
	Denmark	3%	8%	0%	0%	0%	0%	0%	0%	0%
	Netherlands	2%	0%	14%	4%	0%	0%	0%	0%	0%
	Slovakia	2%	0%	0%	4%	4%	0%	32%	0%	0%
	Latvia	2%	0%	16%	0%	0%	0%	0%	0%	0%
	Moldova	2%	0%	0%	0%	0%	23%	0%	0%	0%
	Turkey	2%	3%	0%	0%	0%	0%	0%	0%	0%
Base: respondents who relocated to another country		145	32	18	17	16	8	6	6	5

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

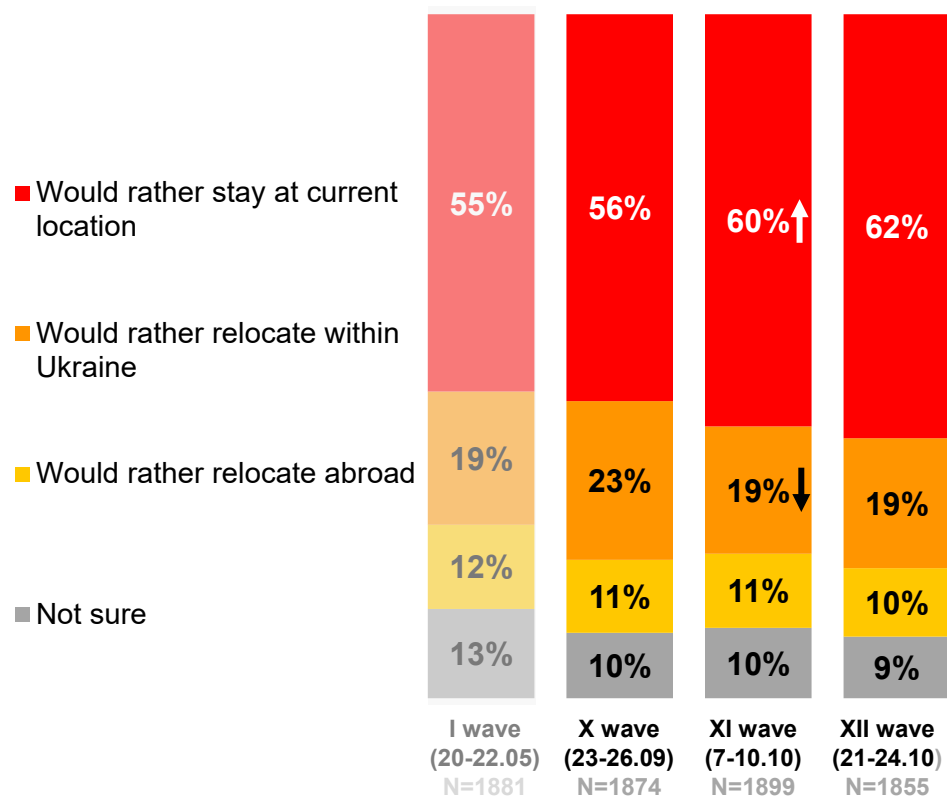
* Insufficient base for analysis
(observation of trend)

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

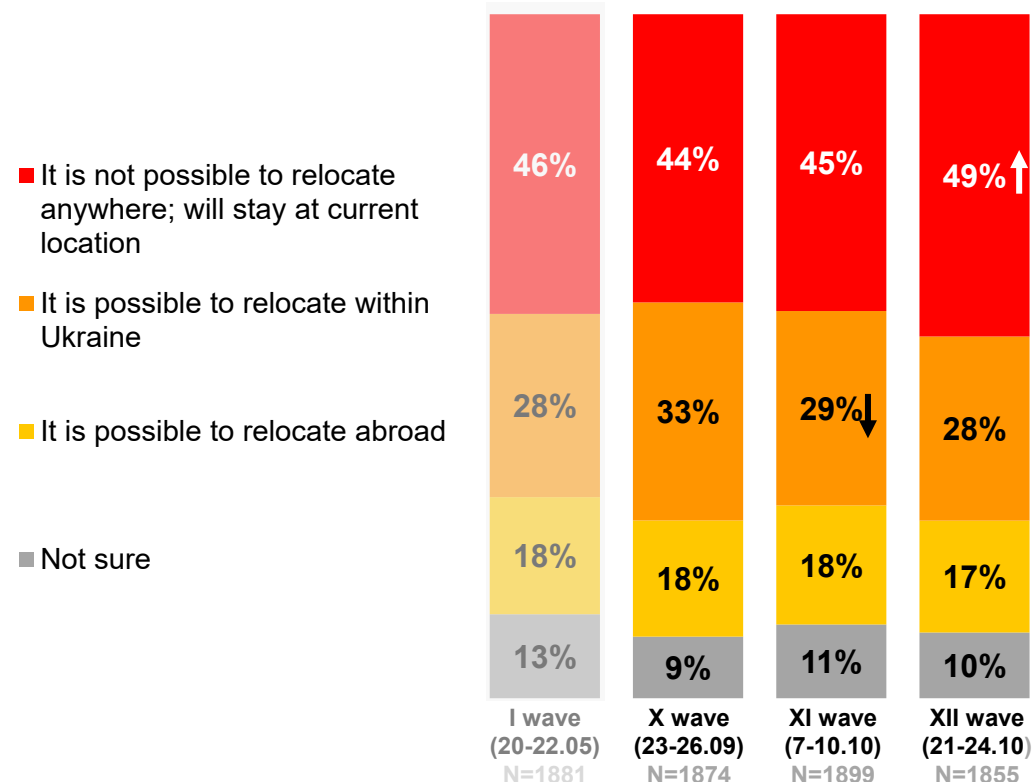
RELOCATION IN CASE OF AGGRAVATION. WISHES & OPPORTUNITIES

In the current wave, there were no recorded statistical differences regarding respondents' desire to relocate in case of aggravation of war events: the majority (62%) want to stay at their current place of residence. 29% of respondents who currently remain in Ukraine want to change their place of residence (19% - migrate within Ukraine, and 10% - abroad). As for opportunities for relocation, compared to the previous wave, the share of people who do not have this opportunity has increased (currently it is 49%). 28% claim that they have the opportunity to relocate within Ukraine, and 17% declare that they have the opportunity to migrate abroad.

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



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



Base: respondents who stayed at home or relocated within Ukraine

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

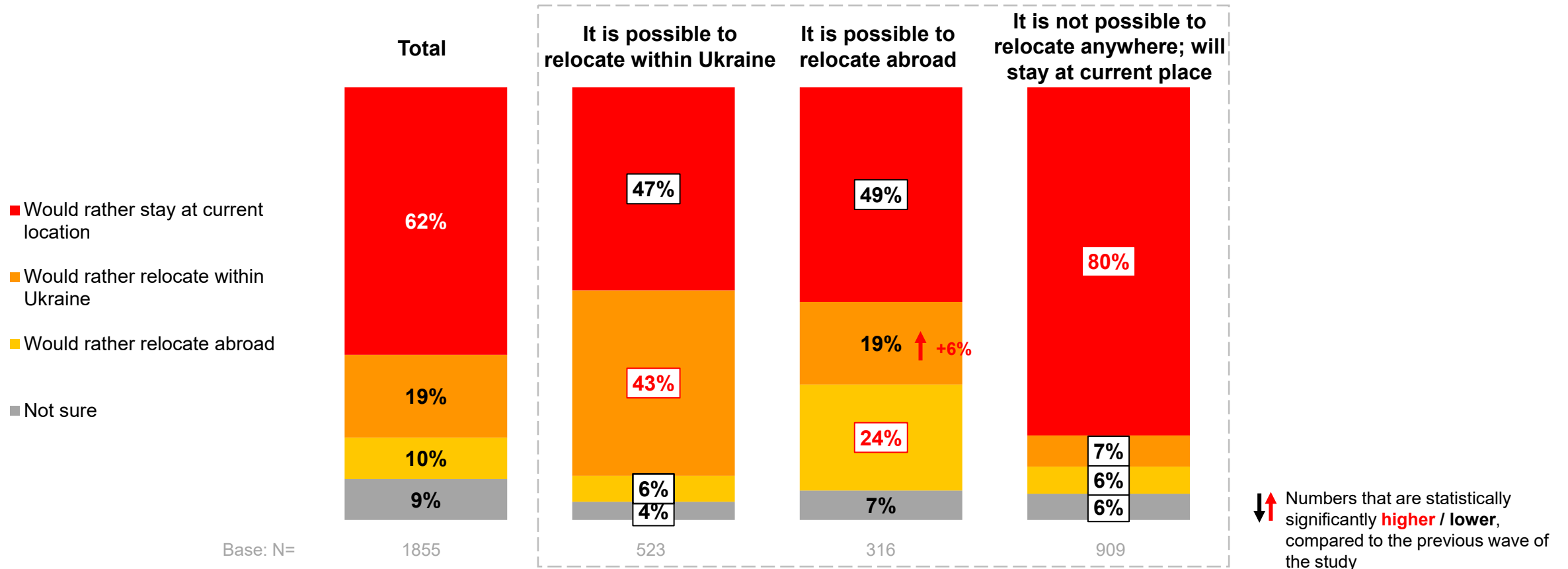
In case of further exacerbation, is it possible for you to relocate further away, go abroad or stay where you are now?

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


RELOCATION IN CASE OF AGGRAVATION. WISHES

by opportunity to relocate

In the current wave, the distribution of those who want to migrate in the event of an aggravation of the situation in the case of presence of such an opportunity remains almost without significant changes.



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.

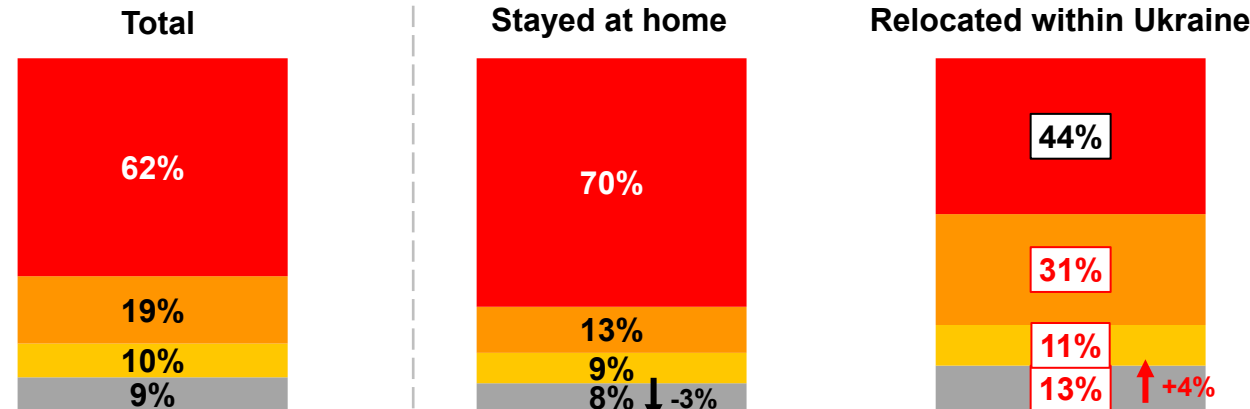
RELOCATION IN CASE OF AGGRAVATION. WISHES & OPPORTUNITIES

by migration status

Compared to the previous wave, there were no recorded significant differences in attitudes and opportunities to migrate among those who stayed at home and relocated within Ukraine. In general, the vast majority of those who stayed at home want to stay at their current place of residence (70%), while 55% do not have the opportunity to relocate. Whereas people who relocated within Ukraine more often have both the intention to change their place of residence (31% - want to migrate within Ukraine, 11% - abroad) and the opportunity to change their place of residence in case of an aggravation of the situation (16% declare the opportunity to migrate abroad, 39% - within Ukraine).

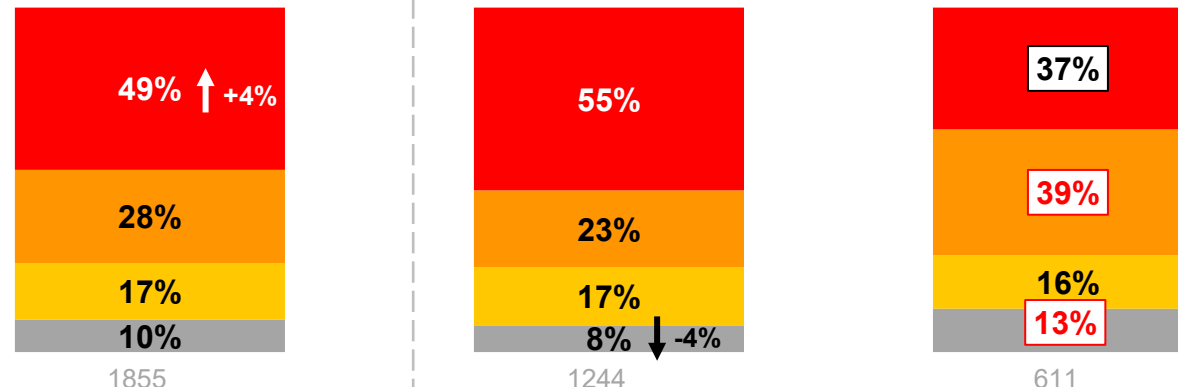
In case of aggravation of the situation **would rather...**

- 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

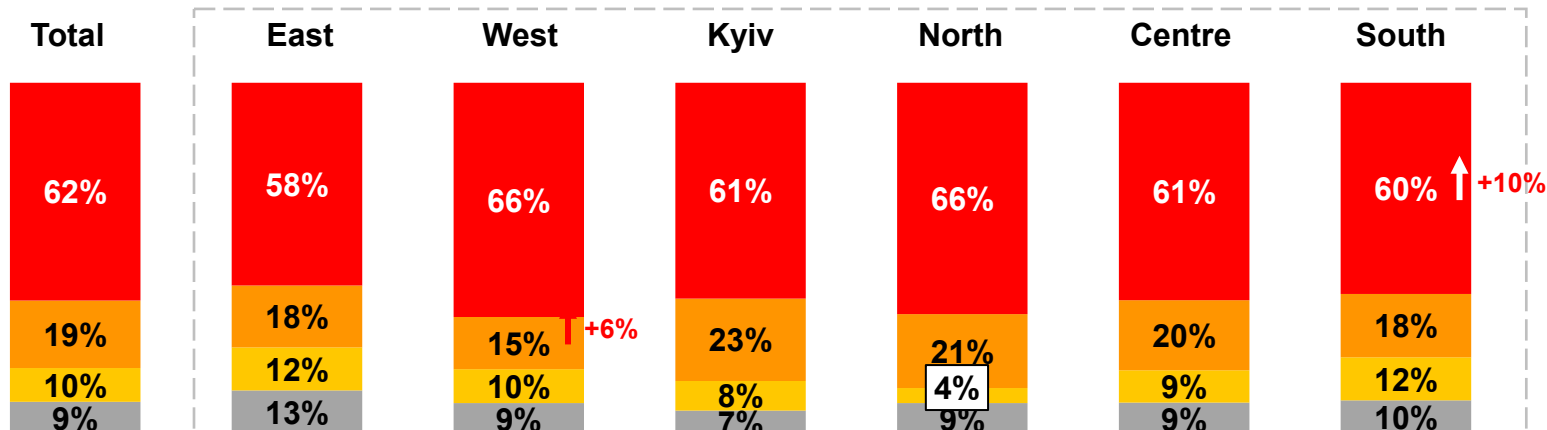
RELOCATION IN CASE OF AGGRAVATION. WISHES & OPPORTUNITIES

by region

As for migration attitudes in the event of an aggravation of the situation by regions, the share of people who want to relocate within Ukraine has increased among residents of the West (by 6 percentage points, currently 15%), while the desire to stay at the current location has increased among residents of the South (by 10 percentage points, currently 60%). In general, among the residents of all regions, the number of people who want to stay in the current place prevails. As for the possibility of relocation, among the residents of the West and the South, the share of those who do not have the possibility to relocate in case of an exacerbation of the situation has increased. At the same time, there was a decrease in the share of those who have the opportunity to migrate within Ukraine among the residents of the East. In general, the vast majority of residents of all regions, except Kyiv, declare that they do not have the opportunity for relocation. Among the residents of Kyiv, the share of people who have the opportunity to relocate within Ukraine prevails.

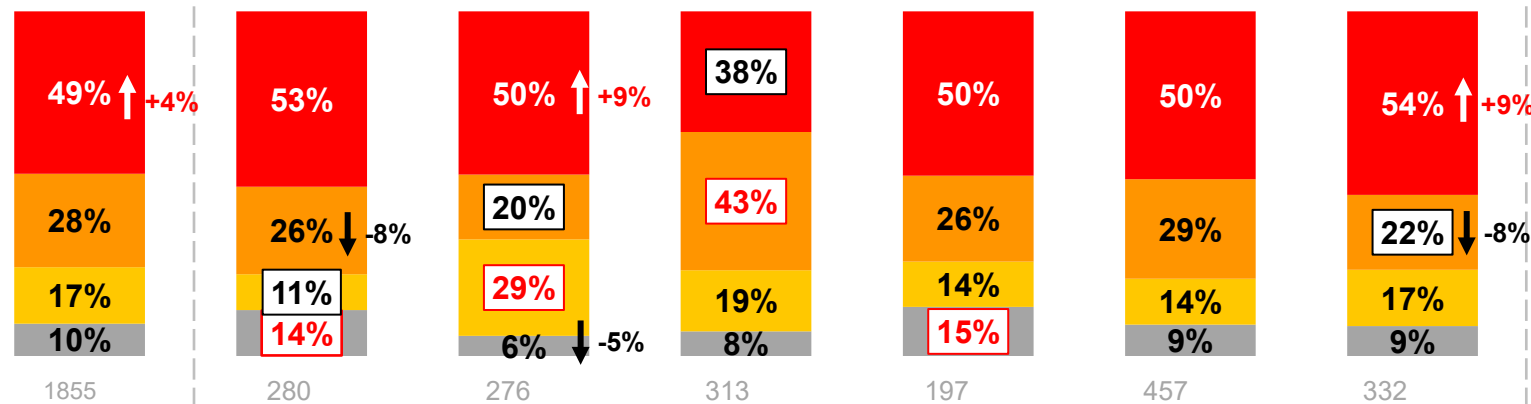
In case of aggravation of the situation **would rather...**

- 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= 1855
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?

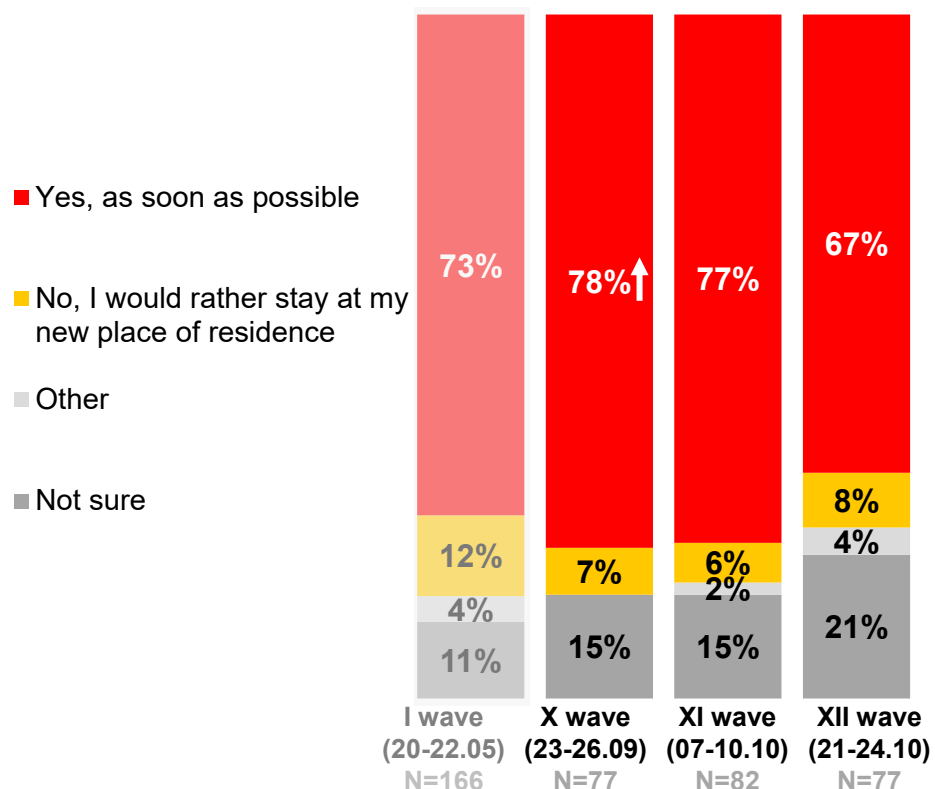
Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

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

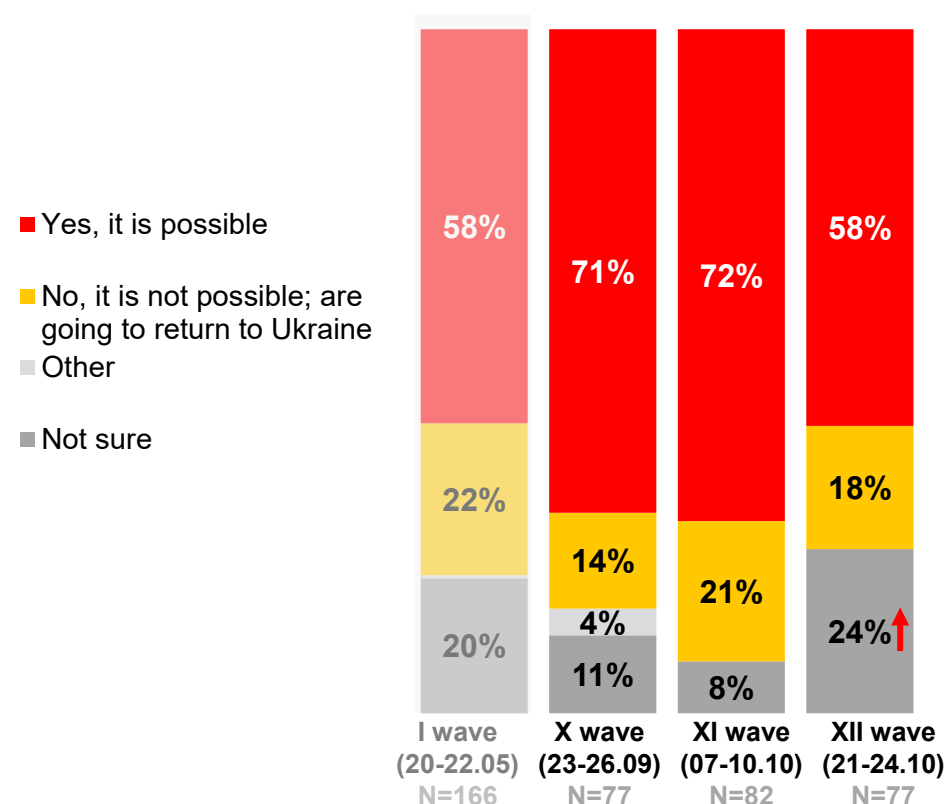
WISHES REGARDING COMING BACK FROM ABROAD. POSSIBILITY OF STAYING THERE

As for the desire to return from abroad, there were no observed significant changes in the twelfth wave of the study: the vast majority (67%) of respondents who are currently abroad want to return at the first opportunity. Compared to the previous wave, there was an increase in the share of people who find it difficult to assess their opportunities of living abroad in the future. 58% of respondents claim that they have the opportunity to stay and live abroad, 18% do not have such an opportunity.

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



A safe situation in the locality (a constant factor over the last four waves) is the most popular driver of returning home among those who migrated abroad. The desire to return to the normal life is the second most important factor that encourages returning to Ukraine.

	IX wave (09-11.09) N=94	X wave (23-26.09) N=77	XI wave (07-10.10) N=82	XII wave (21-24.10) N=77
Safety of my locality	58%	56%	65%	60%
Return home (to normal life)	42%	40%	49%	53%
Availability of housing in Ukraine	29%	32%	40%	48%
Availability of paid work in Ukraine	32%	40%	32%	45%
Love for Ukraine	41%	45%	38%	42%
Willingness to live and grow in Ukraine	31%	38%	37%	40%
Availability of development prospects in Ukraine	27%	21%	32%	29%
Better access to health care in Ukraine	23%	6%↓	25%↑	22%
Reunion with my family	28%	35%	26%	22%
Better access to school education in Ukraine*	7%	9%	9%	19%
Resumption of business in Ukraine	24%	15%	15%	15%
Lower cost of living in Ukraine	23%	14%	21%	15%
Better access to high education in Ukraine*	5%	5%	8%	13%

*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

BARRIERS TO RETURNING TO UKRAINE

The lack of conditions for a safe life is the main barrier to the return to Ukraine of those persons who migrated abroad (a constant factor over the last 4 waves). Among the remaining barriers, the most frequently mentioned are the absence of paid work in Ukraine (40%), better living conditions in the host country (26%) and absence/loss of housing in Ukraine (24%).

	IX wave (09-11.09) N=94	X wave (23-26.09) N=77	XI wave (07-10.10) N=82	XII wave (21-24.10) N=77
Lack of conditions for a safe life in Ukraine	62%	81% ↑	71%	79%
Absence of a paid job in Ukraine	29%	30%	30%	40%
Better living conditions in the country where I currently am	20%	20%	17%	26%
Absence / loss of residence in Ukraine	19%	19%	20%	24%
Availability of development prospects abroad	8%	9%	9%	18%
Lack of access to quality education in Ukraine	4%	6%	7%	10%
Having a paid job in the country where I currently am	12%	12%	8%	8%
Lack of access to quality healthcare in Ukraine	4%	6%	10%	8%
Availability of residence in the country where I currently am	13%	10%	12%	8%
Inability to go abroad again (if I return)	7%	13%	11%	7%

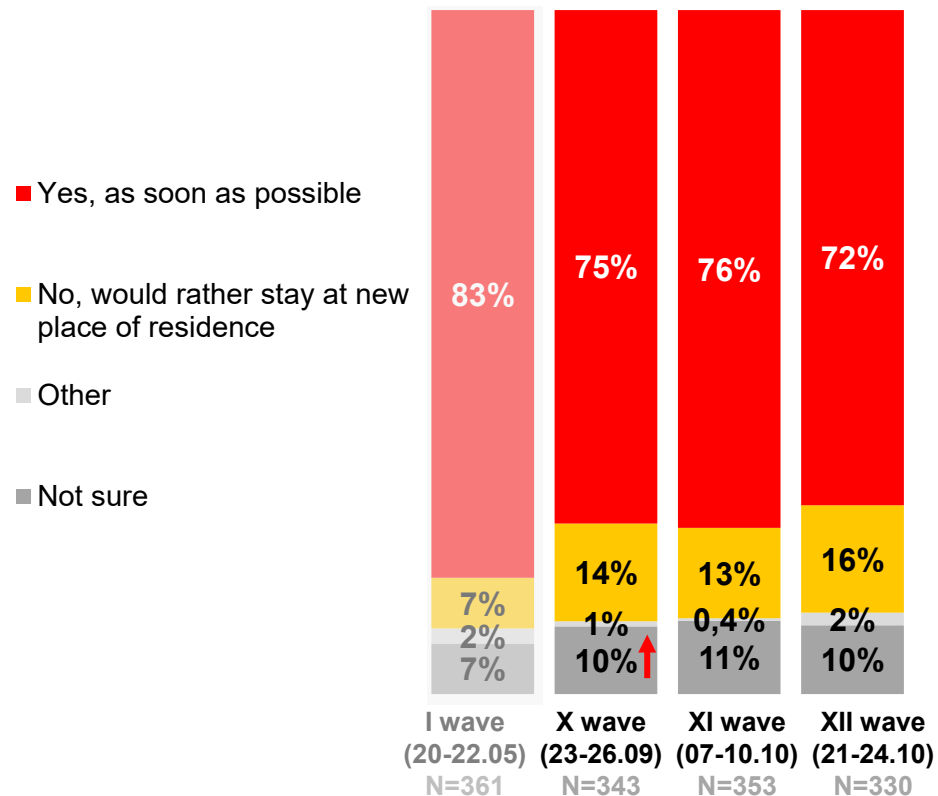
Base: respondents who relocated abroad and have not come back yet
What circumstances are holding you back from returning home?

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

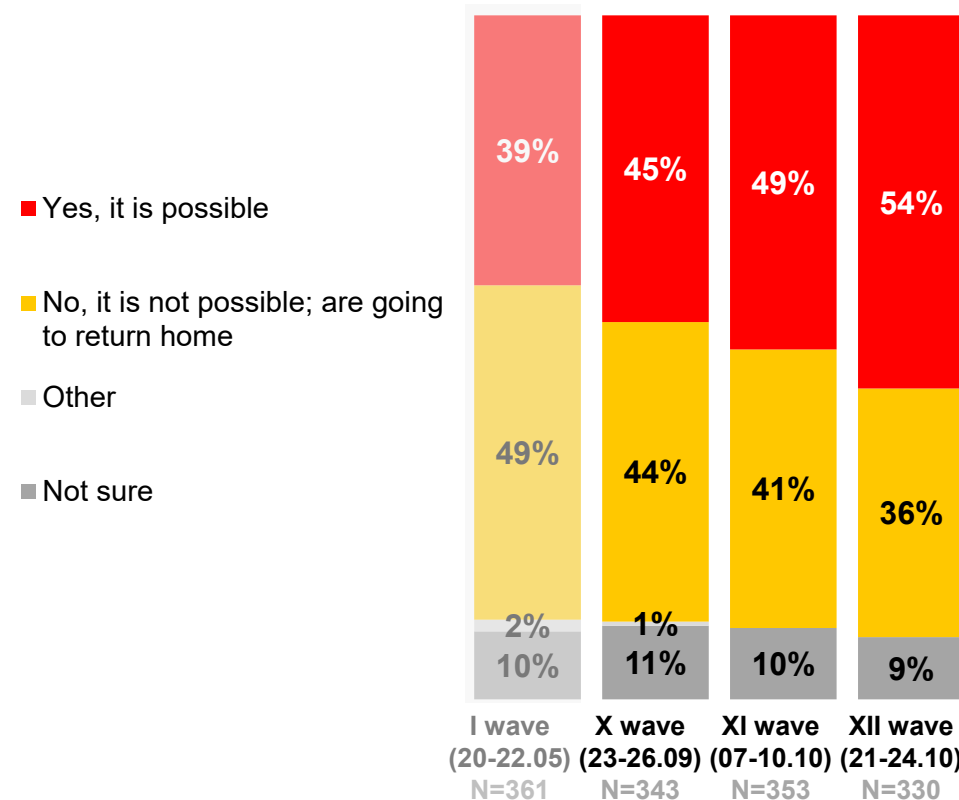
INTERNALLY DISPLACED PERSONS' WISHES REGARDING COMING BACK. POSSIBILITY OF STAYING WHERE THEY ARE

The distribution of answers regarding the desire of IDPs* to change their current place of residence remained without significant changes. Thus, 72% want to return home at the first opportunity, and 16% want to stay and live in a new place. The distribution of answers regarding the possibility of staying in the new place also has not changed significantly – slightly more than half (54%) have such an opportunity, and about a third (36%) 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

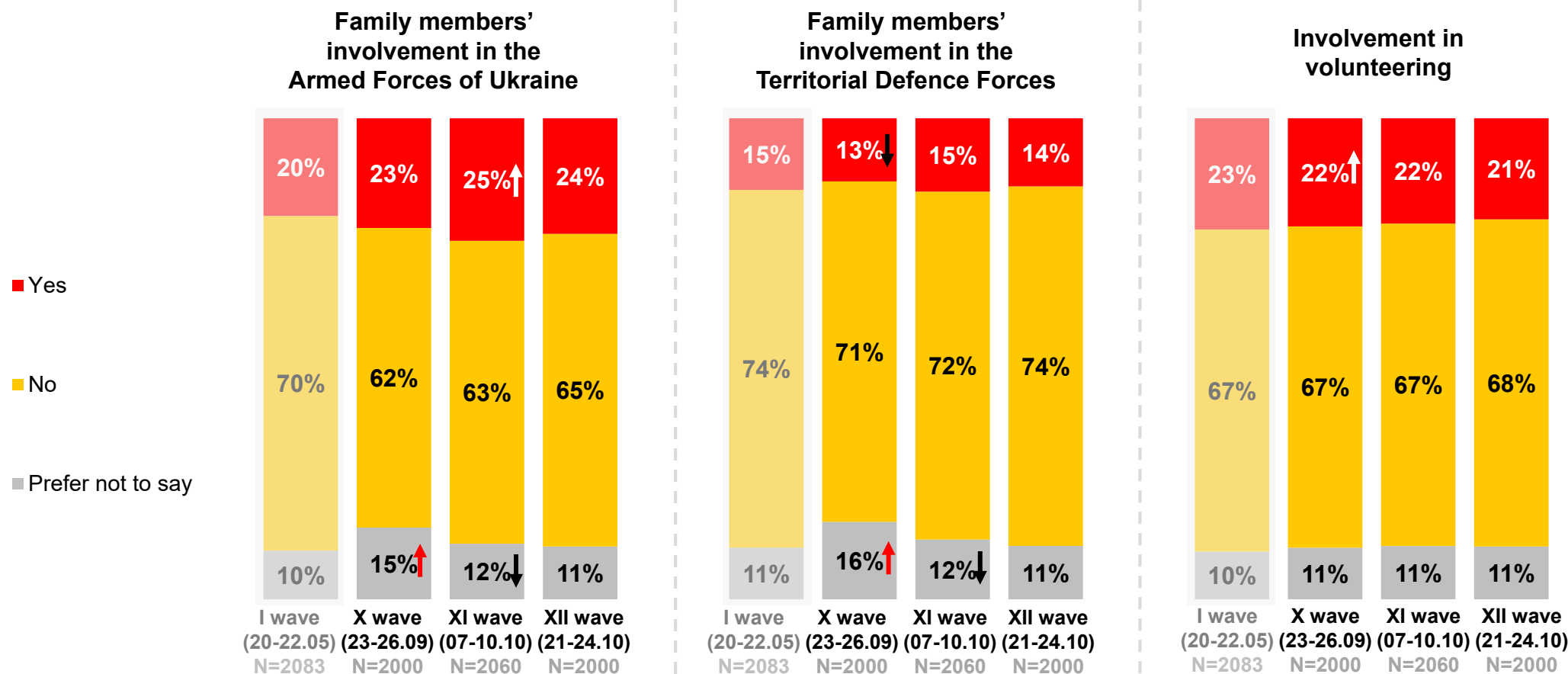
Do you want to return to your permanent place of residence when/if the hostilities there are over?

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 VOLUNTEER ACTIVITIES

In the twelfth wave of the study, the involvement of respondents' family members in service in the Armed Forces of Ukraine and the Territorial Defense Forces is at the level of the previous wave - 24% and 14%, respectively. The involvement of the respondents in volunteer activities also remained without significant changes and is at 21%.



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?

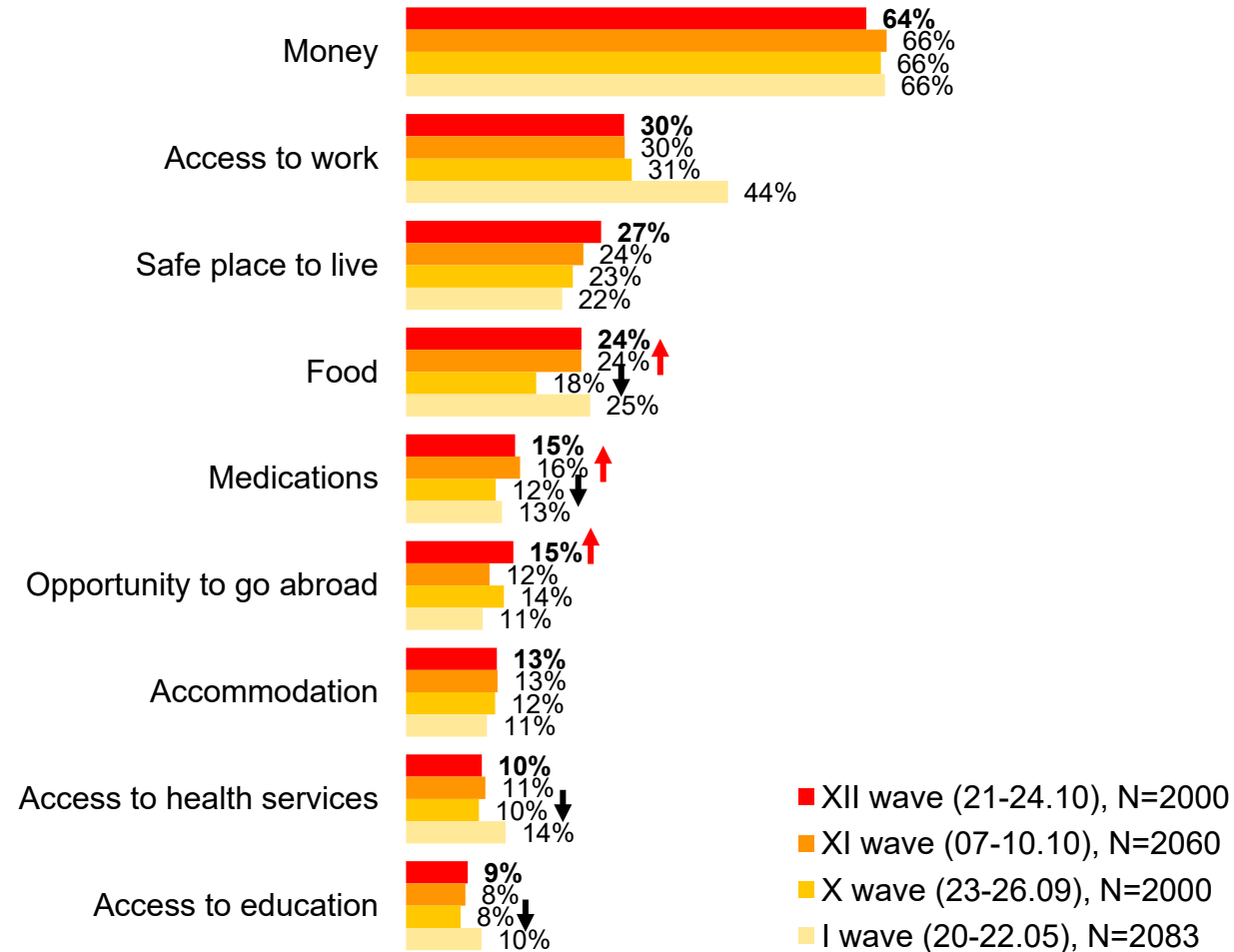
 Numbers that are statistically significantly **higher** /  **lower**, compared to the previous wave of the study

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 64% of respondents and their family members. Compared to the previous wave, the share of persons who feel the need of external migration has slightly increased - currently it is 15% (+3 percentage points).



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

THINGS THAT ARE NEEDED MOST

by migration status


Money remains the greatest need among all migration groups (≥50%). Among those who stayed at home, the need for a safe place to live and opportunity to go abroad increased slightly; the latter also refers to internal migrants.


	Total	Stayed at home*	Relocated within Ukraine	Relocated abroad
Money	64%	64%	65% ↓ -6%	50% ↓ -14%
Access to work	30%	26%	39%	28%
Safe place to live	27%	25% ↑ +4%	30%	28%
Food	24%	24%	27%	19%
Medications	15%	14%	18%	12%
Opportunity to go abroad	15% ↑ +3%	13% ↑ +3%	21% ↑ +6%	4%
Accommodation	13%	7%	25%	14%
Access to health services	10%	9%	11%	16%
Access to education	9%	9%	8%	8%
Base: N=	2000	1244	611	145

*"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

THINGS THAT ARE NEEDED MOST

by region

Money remains the greatest need among all regional groups. The need for opportunity to go abroad has increased due to the growth of the indicator in the East and the West. For more than a third of the residents of the East and the South, work remains the most urgent need after money, while among the residents of the East - the need for food. In addition, compared to the previous wave, there was an increase in the share of those who declare the need for medications among the residents of the East (by 7 percentage points).

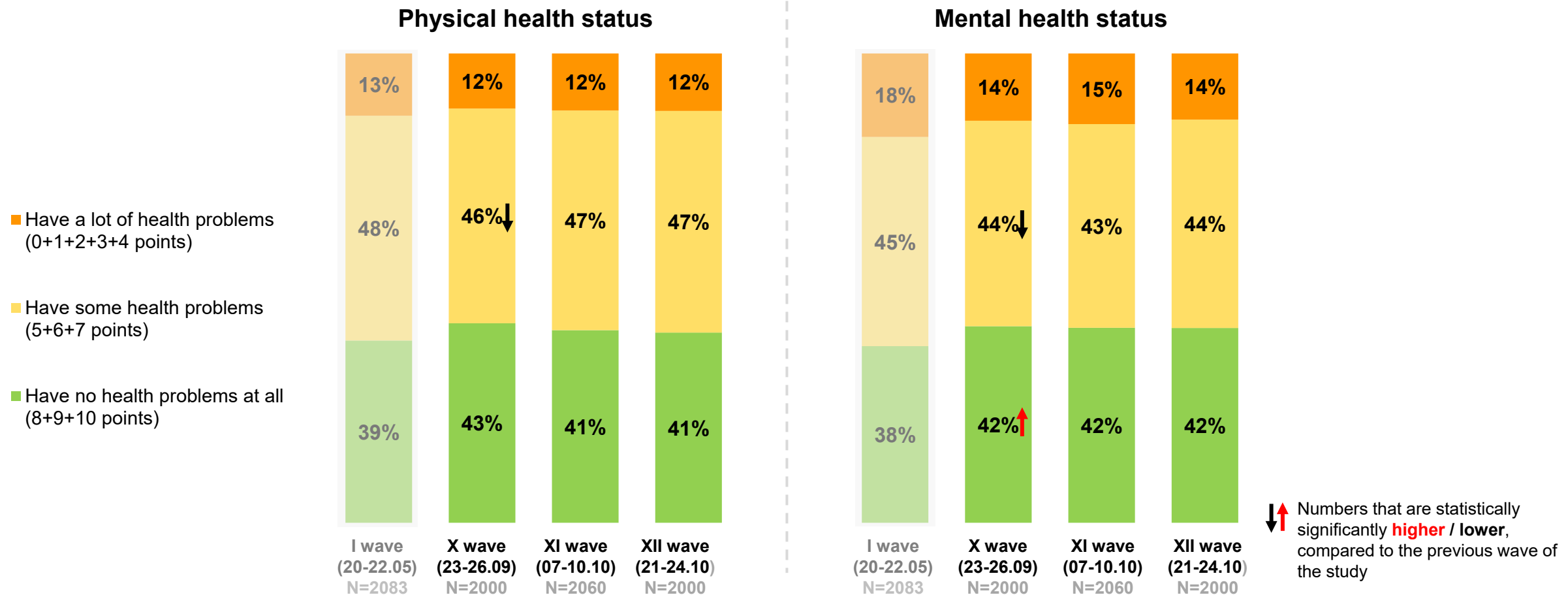
	Total	East	West	Kyiv	North	Centre	South	
Money	64%	67%	62%	61%	69%	62%	63%	↓ -7%
Access to work	30%	43%	20% ↓ -7%	27%	30%	26%	36%	
Safe place to live	27%	32%	20%	32%	24%	24%	30%	
Food	24%	35%	17%	24%	21%	21%	27%	
Medications	15%	22% ↑ +7%	13%	10%	12%	15% ↓ -5%	19%	
Opportunity to go abroad	15% ↑ +3%	16% ↑ +7%	15% ↑ +6%	15%	8%	14%	18%	
Accommodation	13%	26%	7%	12%	4%	10%	14% ↑ +7%	
Access to health services	10%	14%	8%	12%	9%	9%	11%	
Access to education	9%	8%	8%	8%	8%	11%	7%	
Base: N=	2000	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 twelfth wave, the distribution of subjective assessments of the state of physical and mental health remained unchanged. The largest share of respondents has some physical health problems (47%), while a slightly smaller share (41%) has no physical health problems. As for the mental health, the share of those who have certain problems with it and the share of those who do not have any problems are almost the same - 44% and 42%, respectively.



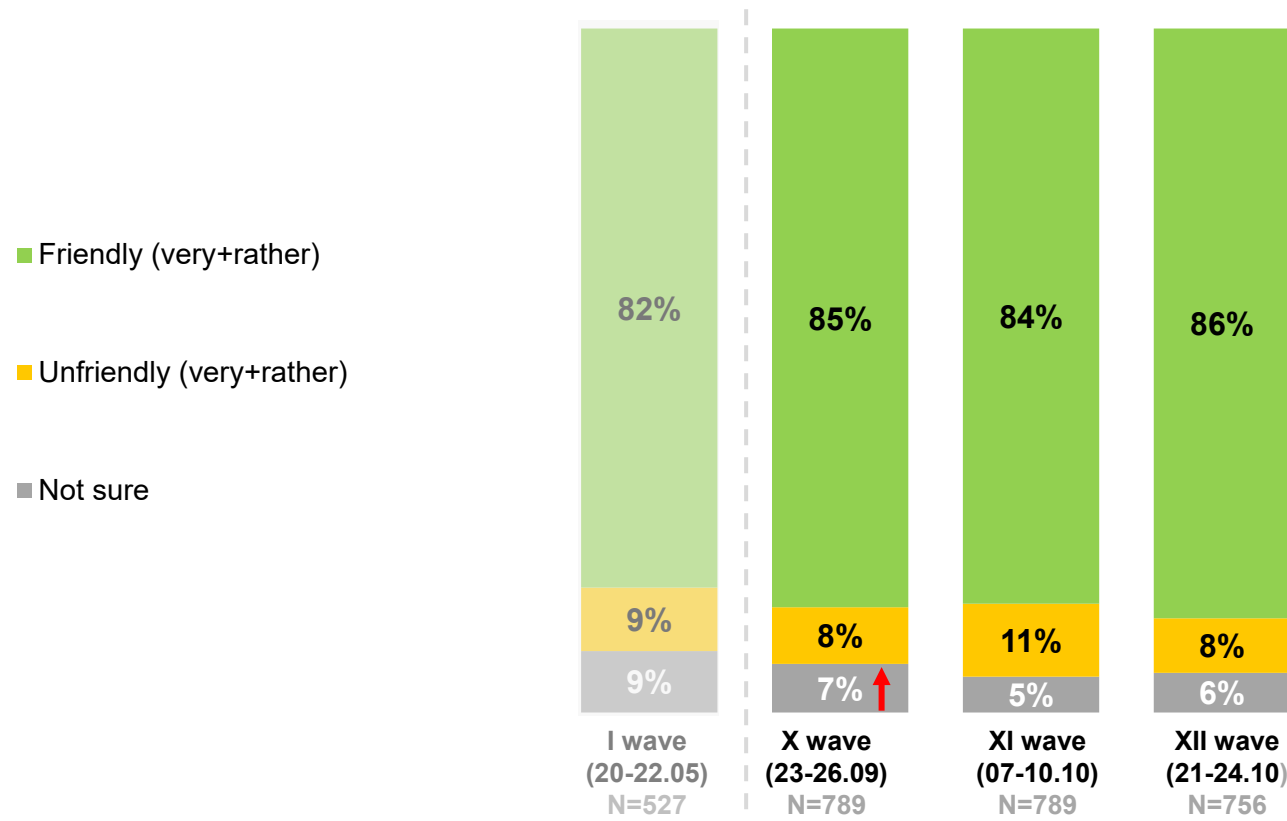
Base: all respondents

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

Compared to the previous wave, 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: 86% 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

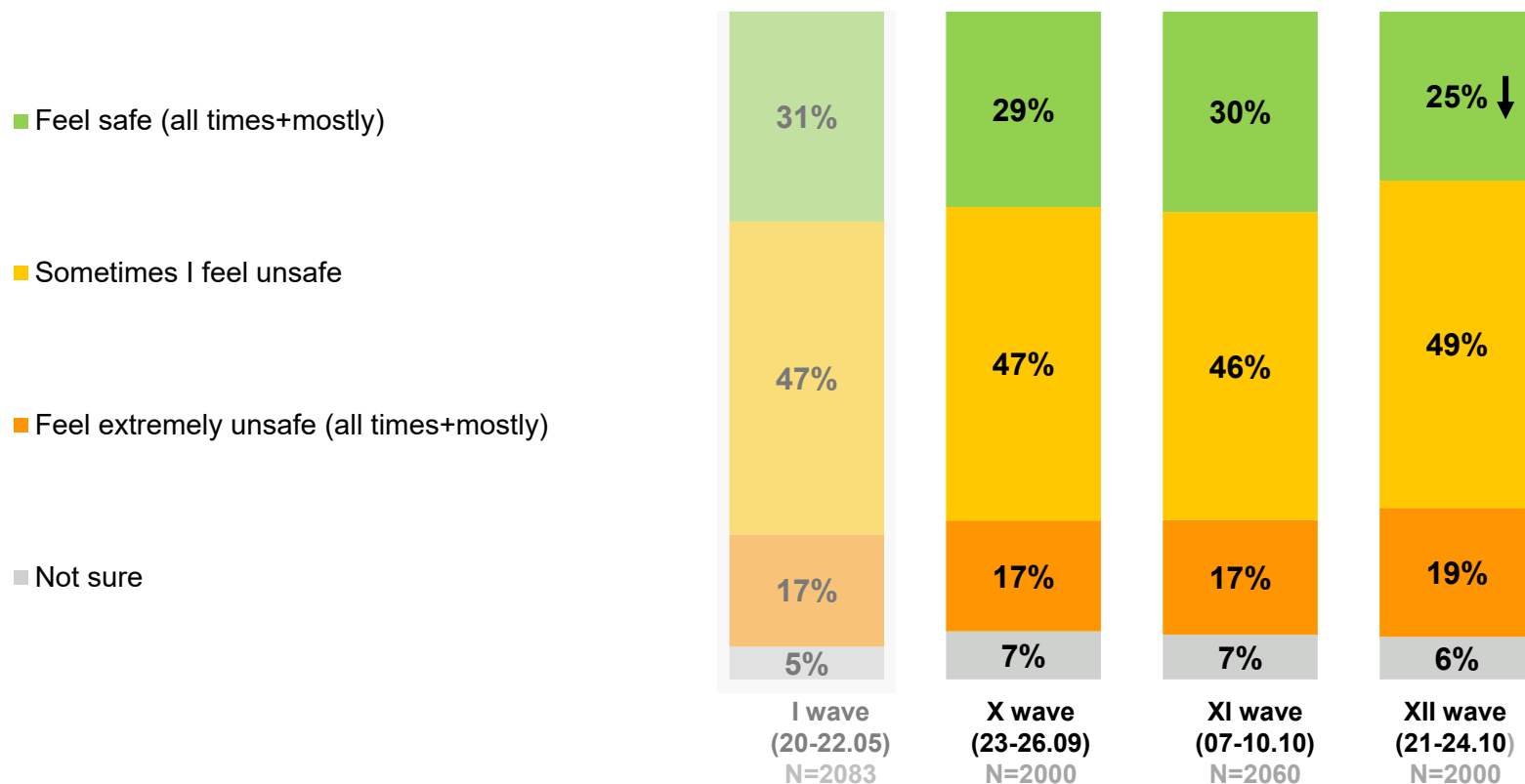
Base: respondents who changed their locations

*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

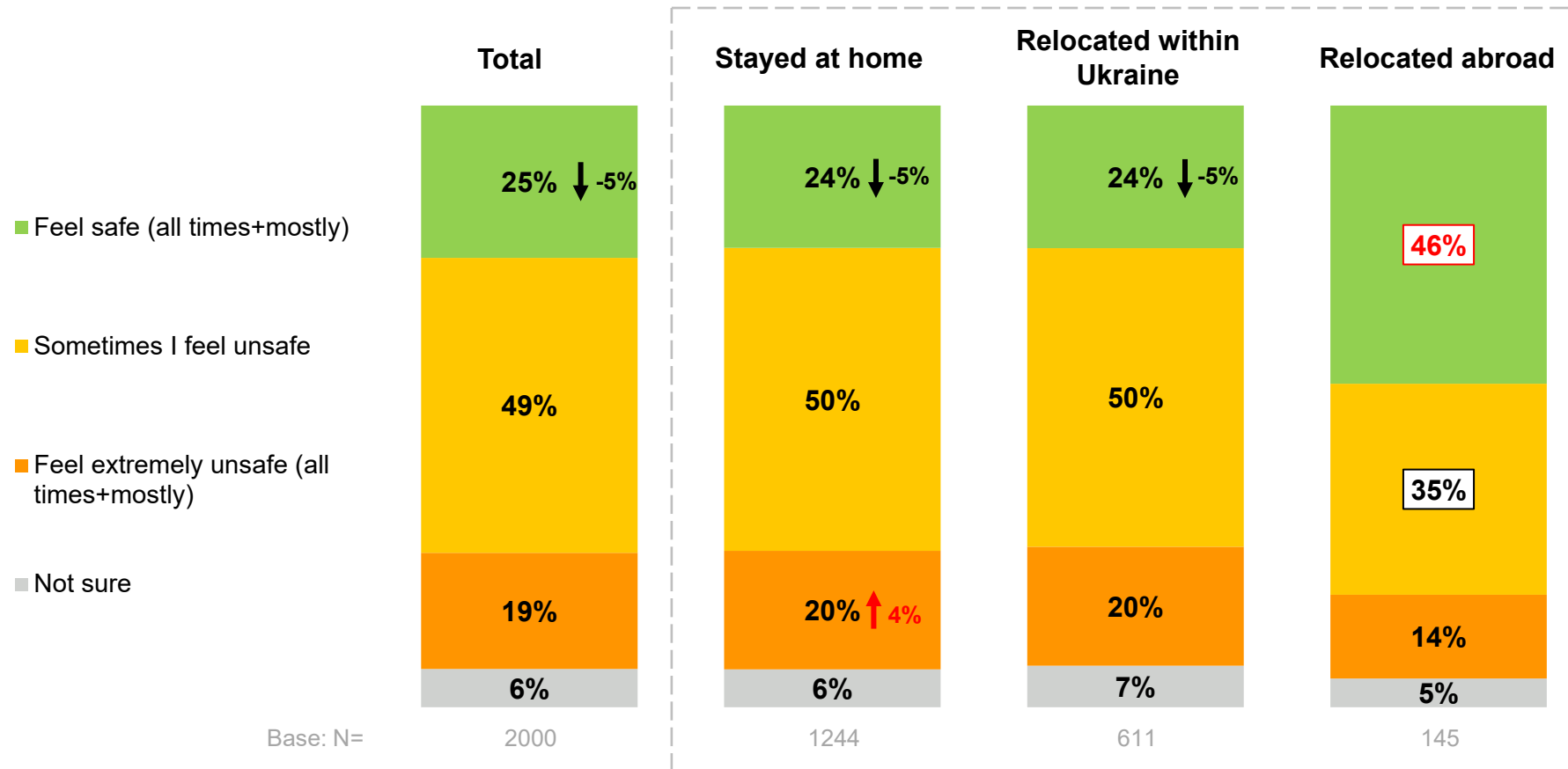
In the current wave, the share of people who feel safe has decreased - the indicator is currently at 25%. The largest share (49%) of respondents claim that they sometimes feel unsafe, and almost a fifth (19%) - feel unsafe all the time or most of the time.



PERCEIVED SAFETY

by migration status


The vast majority of those who migrated within Ukraine and those who stayed at home continue to feel unsafe from time to time. At the same time, the share of people who feel safe also decreased among them - to 24%. Whereas about half (46%) of those who migrated abroad feel safe most of the time.




*IDPs - internally displaced persons

Base: all respondents

Which of the following statements best describes your current state?

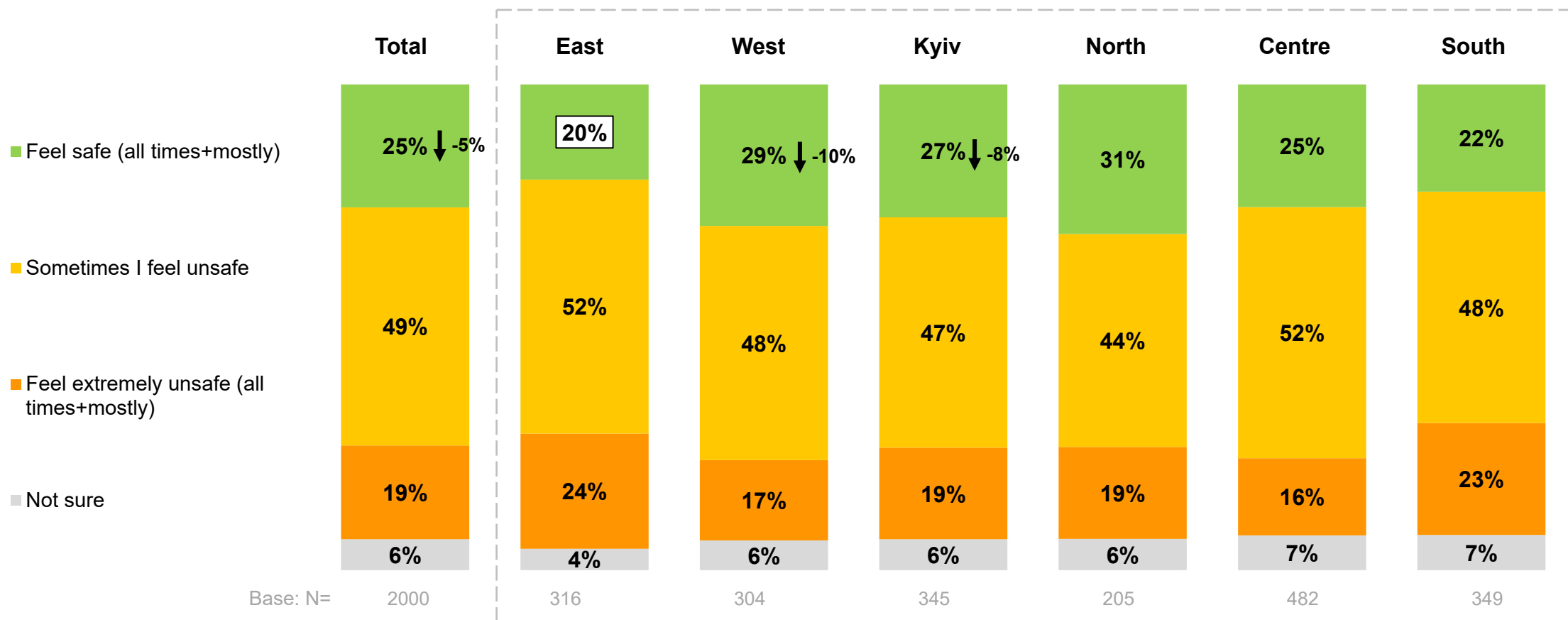
 Numbers that are statistically significantly **higher** / **lower** for the group, compared to the sample as a whole

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

PERCEIVED SAFETY


by region


Compared to the previous wave, among the residents of the West and Kyiv, there was a decrease in the share of people who feel safe all the time or most of the time. In general, the feeling of unsafety from time to time prevails among the residents of all regions. Residents of the East report that they feel safe less often than the sample in general.



Base: all respondents

Which of the following statements best describes your current state?

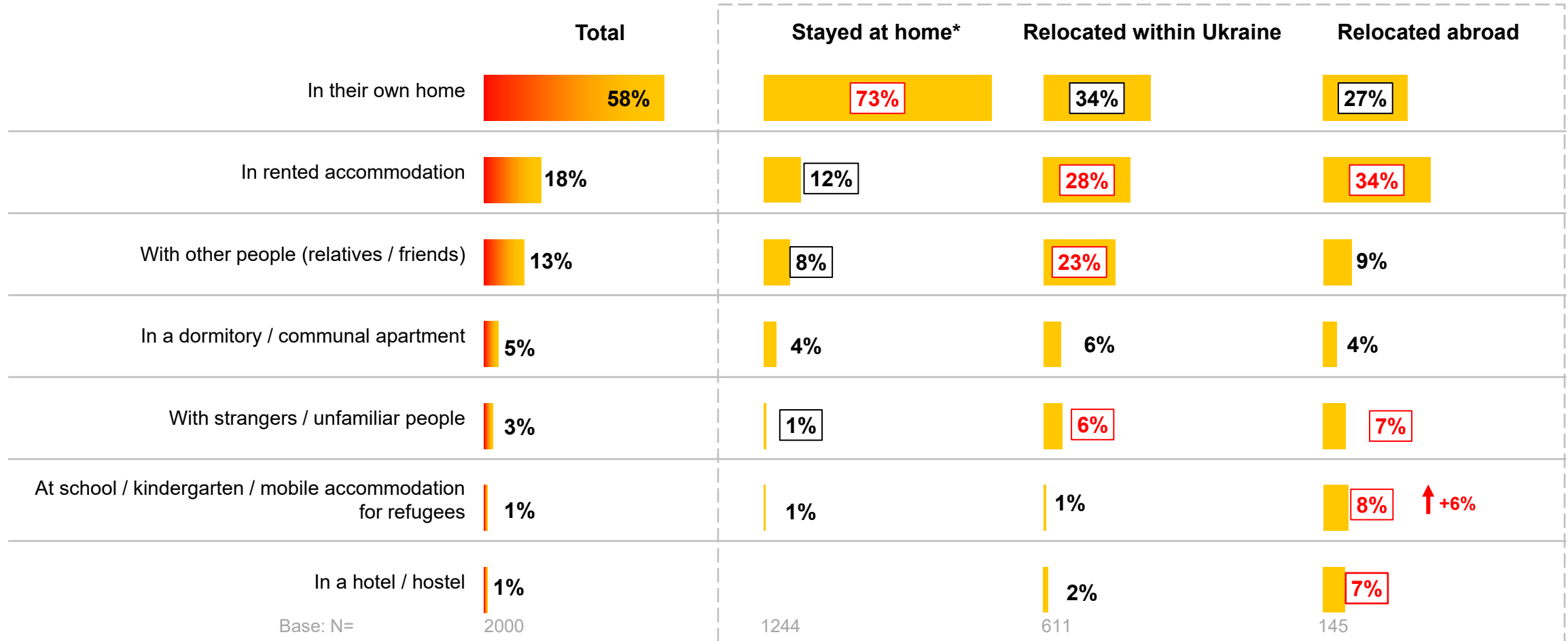
 Numbers that are statistically significantly **higher** / **lower** for the group, compared to the sample as a whole

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

CURRENT RESIDENCE

by migration status

There were no recorded significant differences compared to the previous wave: the vast majority (58%) of the respondents live in their own home (this indicator is higher among those who remained at their place of residence), while external and internal migrants more often do not live in their own home.



*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

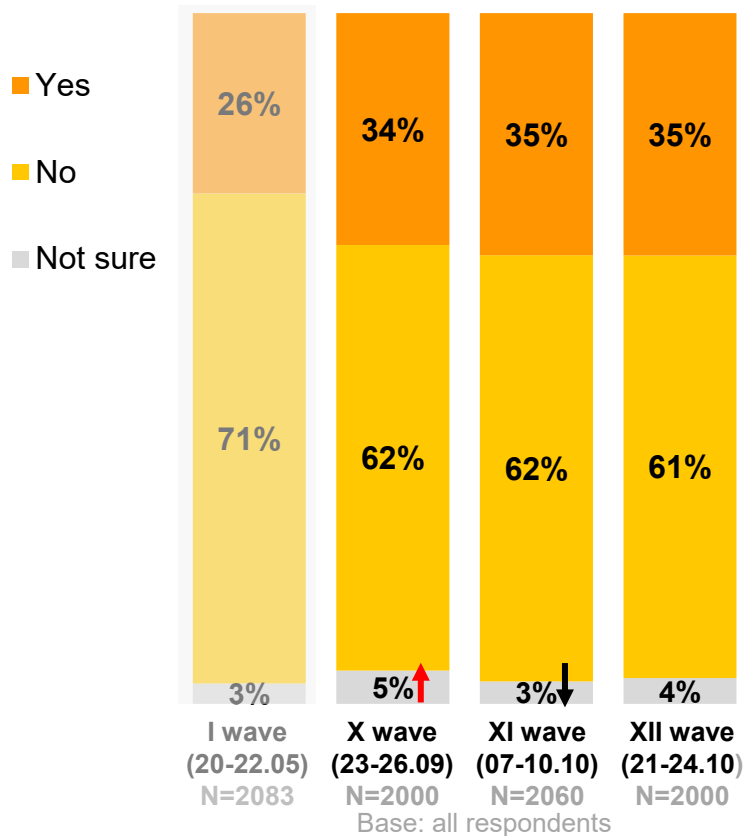


Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

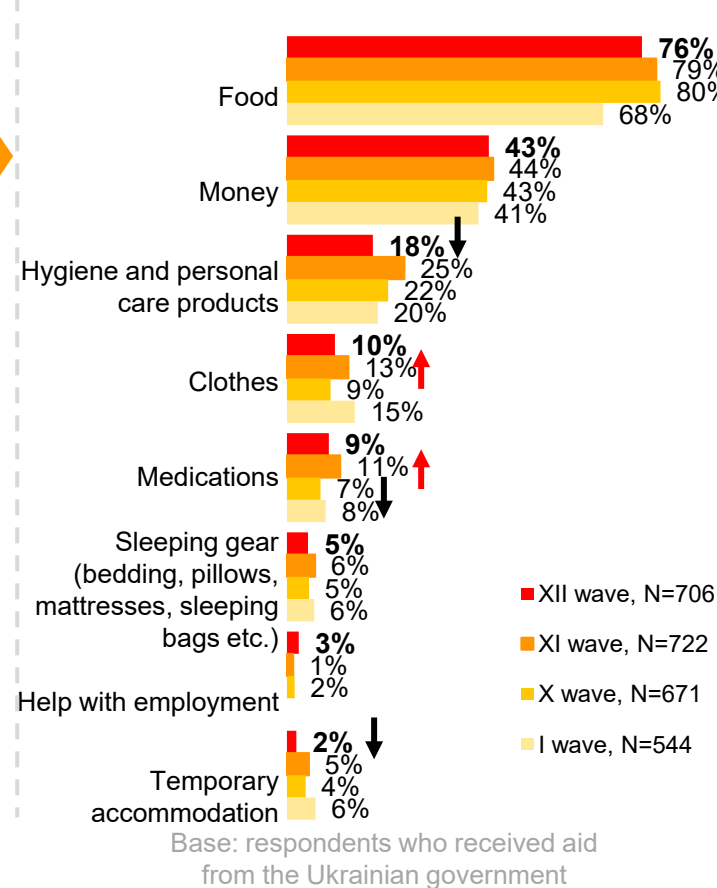
HUMANITARIAN AID FROM THE **UKRAINIAN** GOVERNMENT

The percentage of respondents who received humanitarian aid from the Ukrainian state remains unchanged (at the level of 35%). Food (76%) and money (43%) are the most popular forms of assistance. Compared to the previous wave, there are no significant changes in the subjective evaluations of received humanitarian aid: 48% of recipients evaluate the assistance which they received as sufficient (at the trend level, there is an increase in the share of those who assess this assistance as sufficient).

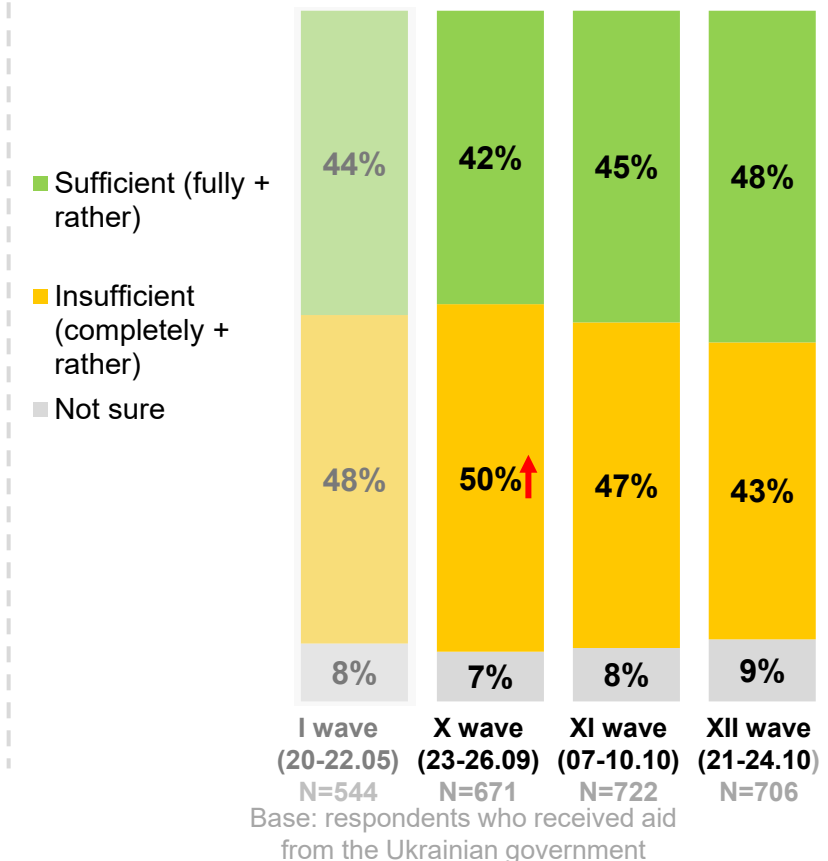
Reception of humanitarian aid from the government



Type of humanitarian aid



Sufficiency of the humanitarian aid



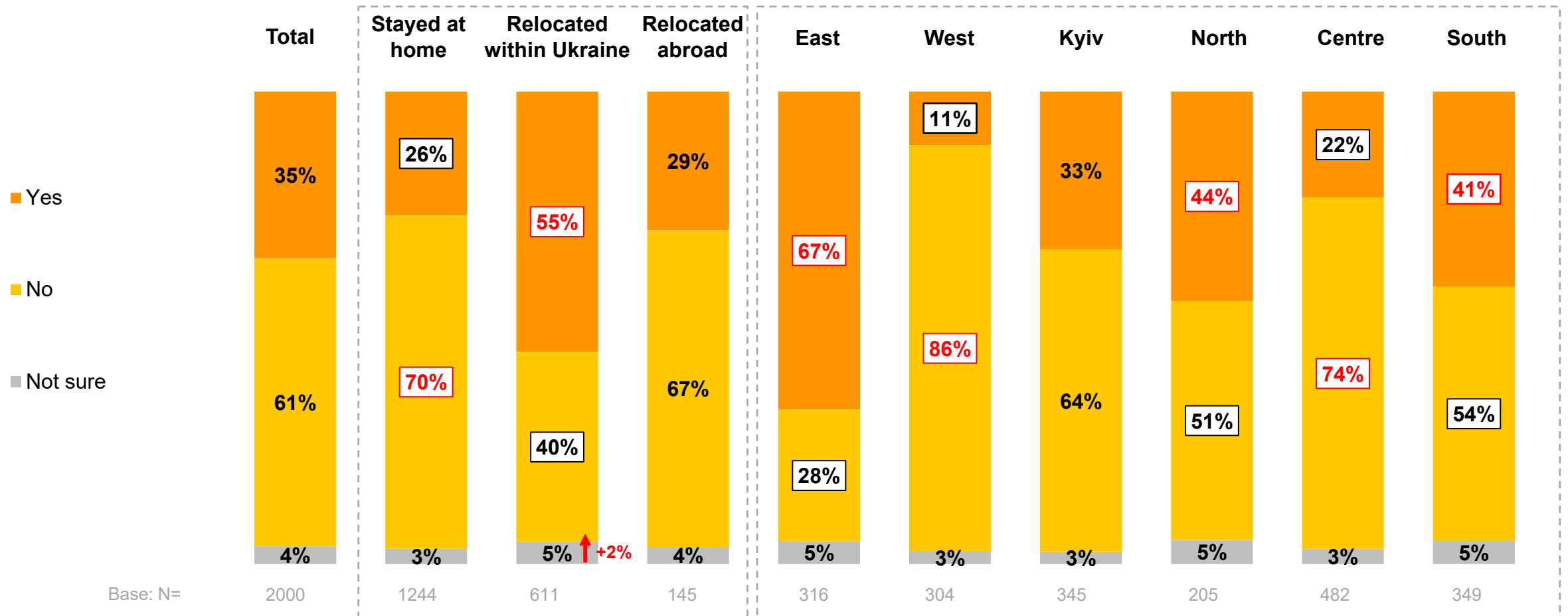
Have you or your family received humanitarian aid from the Ukrainian government?
 What kind of humanitarian aid did you or your family receive from the Ukrainian government?
 How would you assess the humanitarian aid provided to you or your family by the Ukrainian government?

↑↓ Статистично значущо **більше** / **менше**, порівняно з попереднім періодом дослідження

HUMANITARIAN AID RECEIVED FROM THE UKRAINIAN GOVERNMENT



by migration status and region



Compared to the previous wave, there were no recorded significant differences in the receipt of humanitarian aid from the Ukrainian state among different migration and regional groups. Humanitarian aid from the Ukrainian state is mostly received by internally displaced persons and people from the Eastern, Northern and Southern regions. The least number of recipients of assistance was recorded among those who stayed at home, as well as among residents of 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, among internal migrants, there was a decrease in the share of people who received aid from the Ukrainian state in the form of hygiene and personal care products as well as the temporary housing. Residents of the South declare a decrease in the amount of receiving of clothes, medications and temporary housing, residents of the North - hygiene and personal care products, residents of the East - temporary housing. Among the residents of Kyiv and those who stayed at home, the share of people who received help with employment has increased.

	Total	Stayed at home	Relocated within Ukraine	Relocated abroad	East	West	Kyiv	North	Centre	South
Food	76%	77%	78%	60%	86%	46%	65%	79%	64%	85%
Money	43%	33%	52%	50%	44%	55%	56%	31%	37%	42%
Hygiene and personal care products	18% ↓ -7%	13%	24% ↓ -9%	23%	21%	16%	22%	15% ↓ -15%	11%	20%
Clothes	10%	3%	16%	19%	11%	12%	14%	8%	13%	5% ↓ -9%
Medications	9%	6%	11%	14%	7%	20%	8%	19%	10%	4% ↓ -7%
Sleeping gear (bedding, pillows, mattresses, sleeping bags etc.)	5%	1%	6%	15%	6%	8%	4%		3%	6%
Help with employment	3%	2% ↑ +2%	2%	14%	0,4%	19%	3% ↑ +3%	3%	2%	1%
Temporary accommodation	2% ↓ -3%		3% ↓ -4%	11%	2% ↓ -3%	11%	3%	1%	1%	1% ↓ -8%
Base: N=	706	326	337	43*	213	34*	115	91	108	144

* 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?

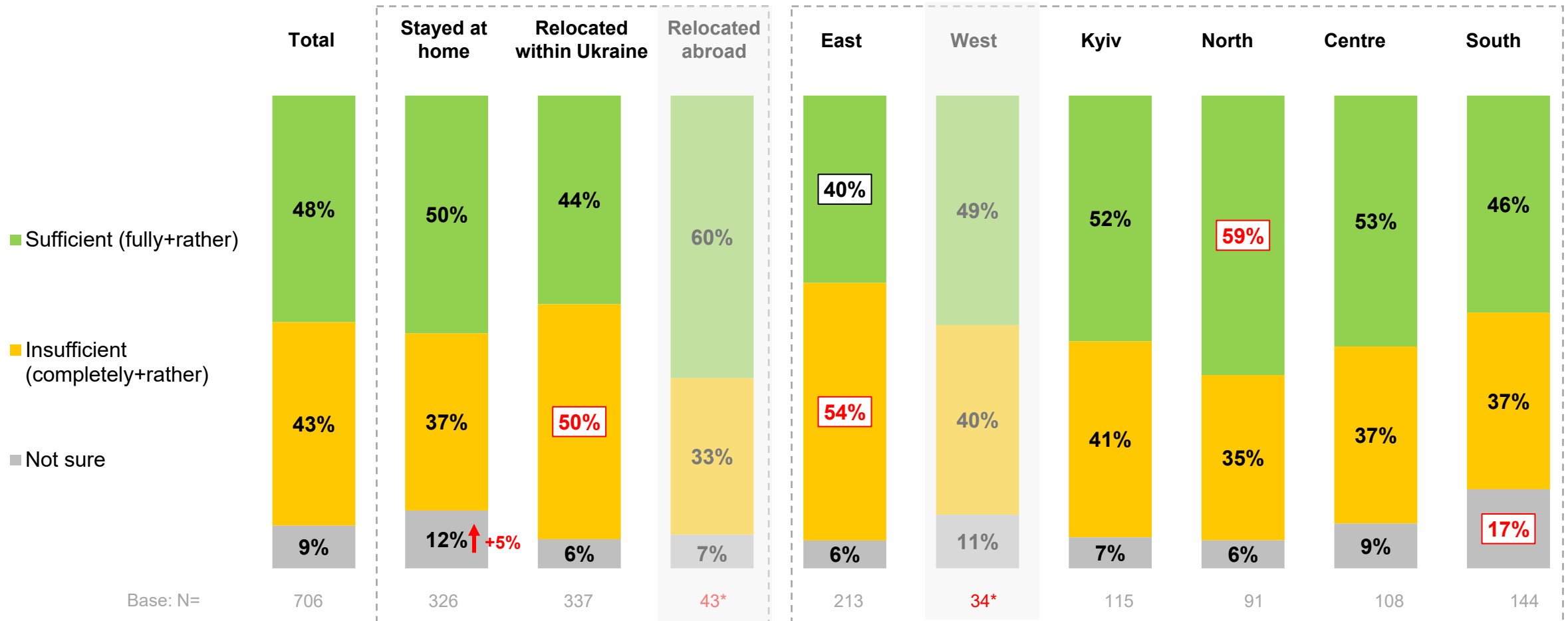
↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

□ 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

Residents of the North evaluate humanitarian aid from the Ukrainian state as sufficient more often than residents of other regions (59% vs 48%), while residents of the East and those who relocated within Ukraine, on the contrary, more often assess it as insufficient - 54% and 50% vs 43%.



* Insufficient base for analysis (observation of trend)

Base: respondents who received aid from government

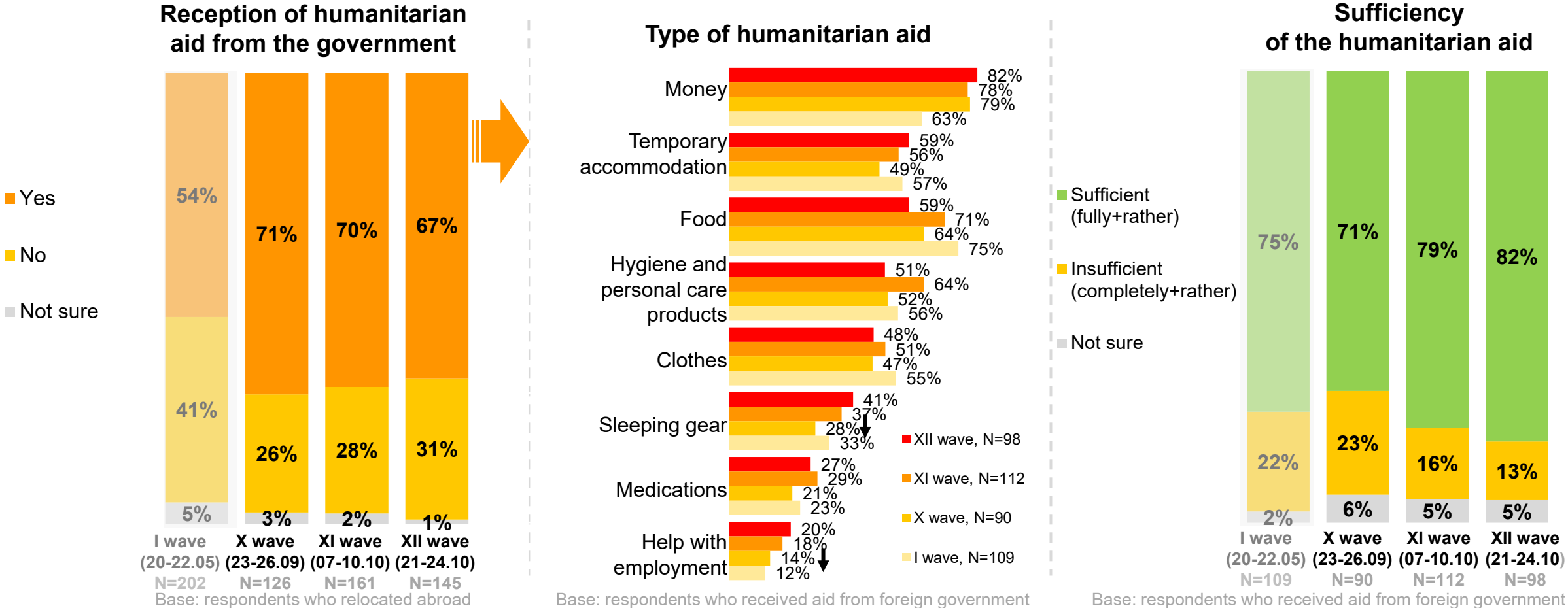
How would you assess the humanitarian aid provided to you or your family by the Ukrainian government?

↑ 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 external migrants, 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 67%. The majority (82%) of those who received it assessed this humanitarian aid as sufficient. Money (82%), temporary housing (59%) and food (59%) are the TOP-3 most common forms of assistance.



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

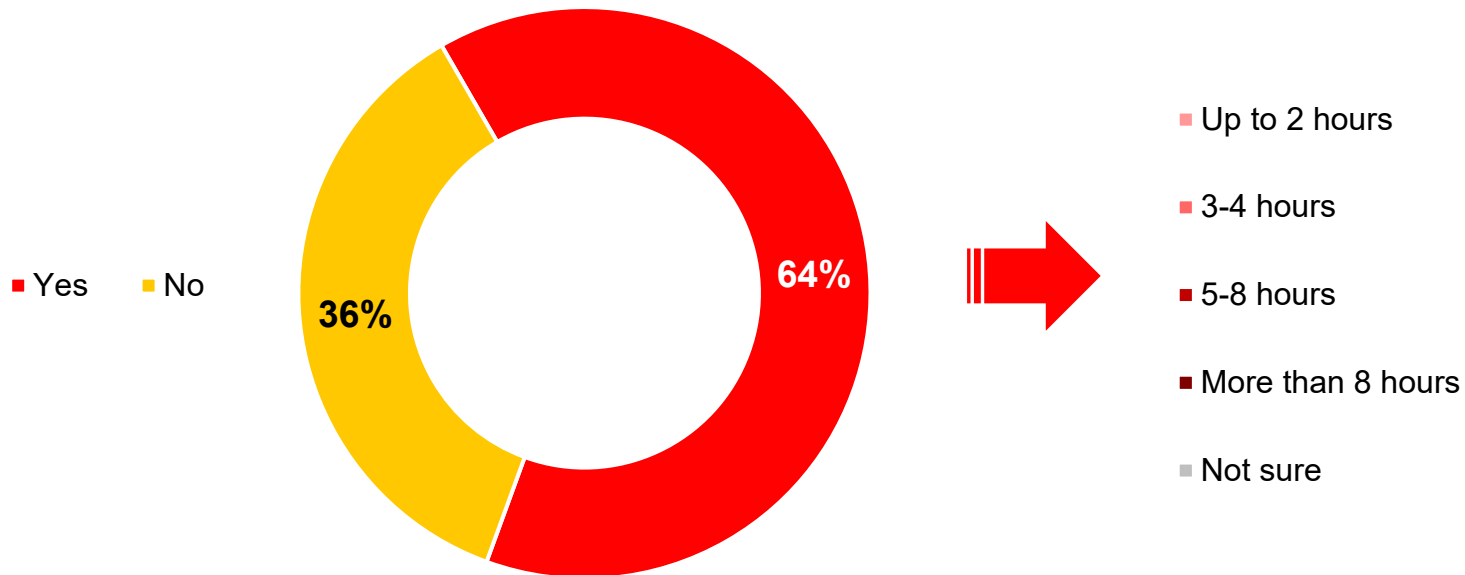
ENERGY SITUATION



LIGHT / POWER OUTAGES IN RECENT DAYS

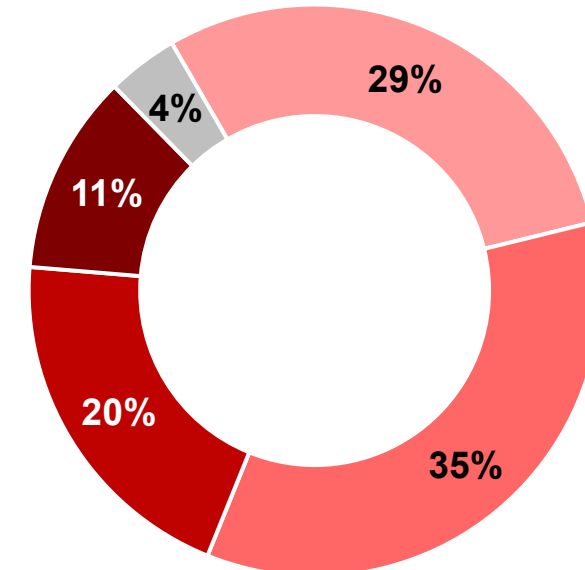
64% of respondents who currently live in Ukraine have experienced a power outage in recent days. Among those who experienced such outages, more than half (64%) of the respondents indicated that such outages lasted up to 4 hours on average (29% - up to 2 hours, and 35% - 3-4 hours); another 20% of respondents claimed that they lasted on average from 5 to 8 hours, and 11% - more than 8 hours.

Encountered light / power outages in recent days



Base: respondents currently living in Ukraine, N=1923

The average duration of such outages

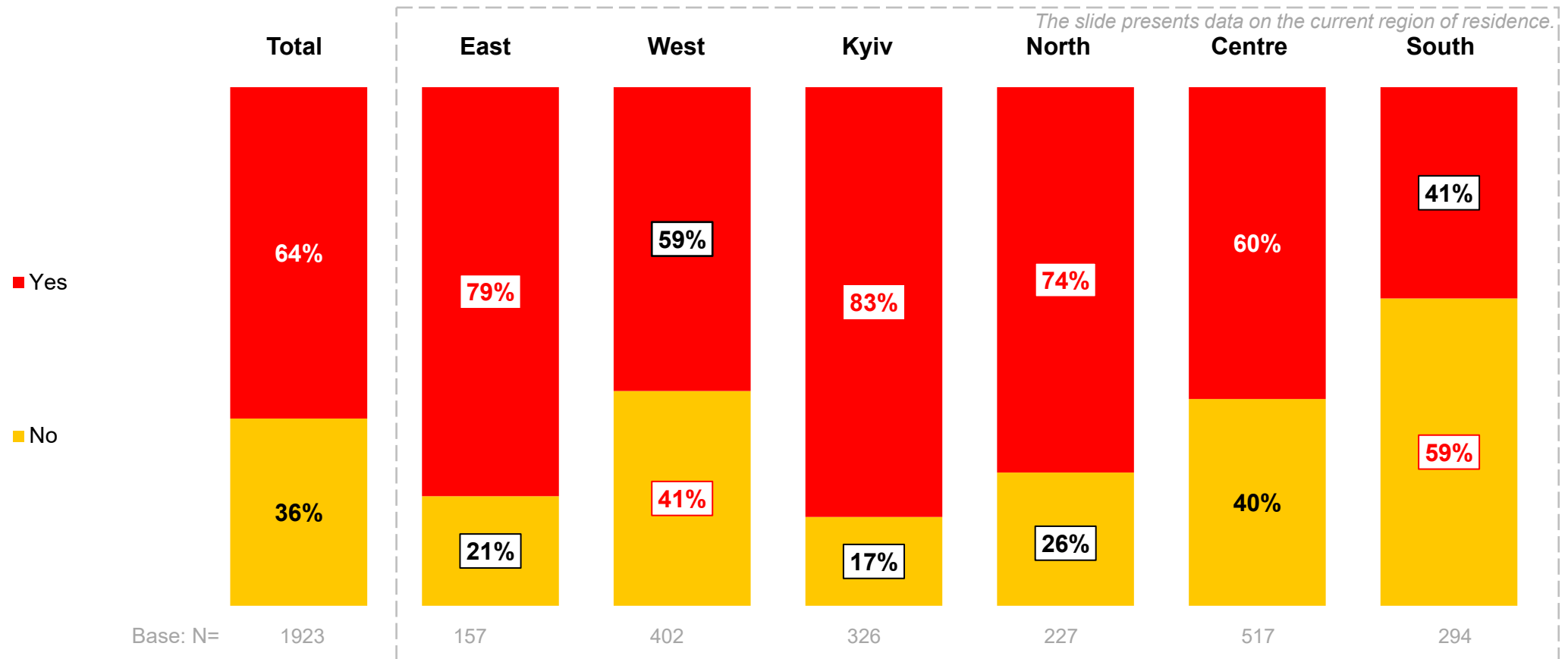


Base: respondents who currently live in Ukraine and encountered a power outage in recent days, N=1229

LIGHT / POWER OUTAGES IN RECENT DAYS

by regions (current region of residence)

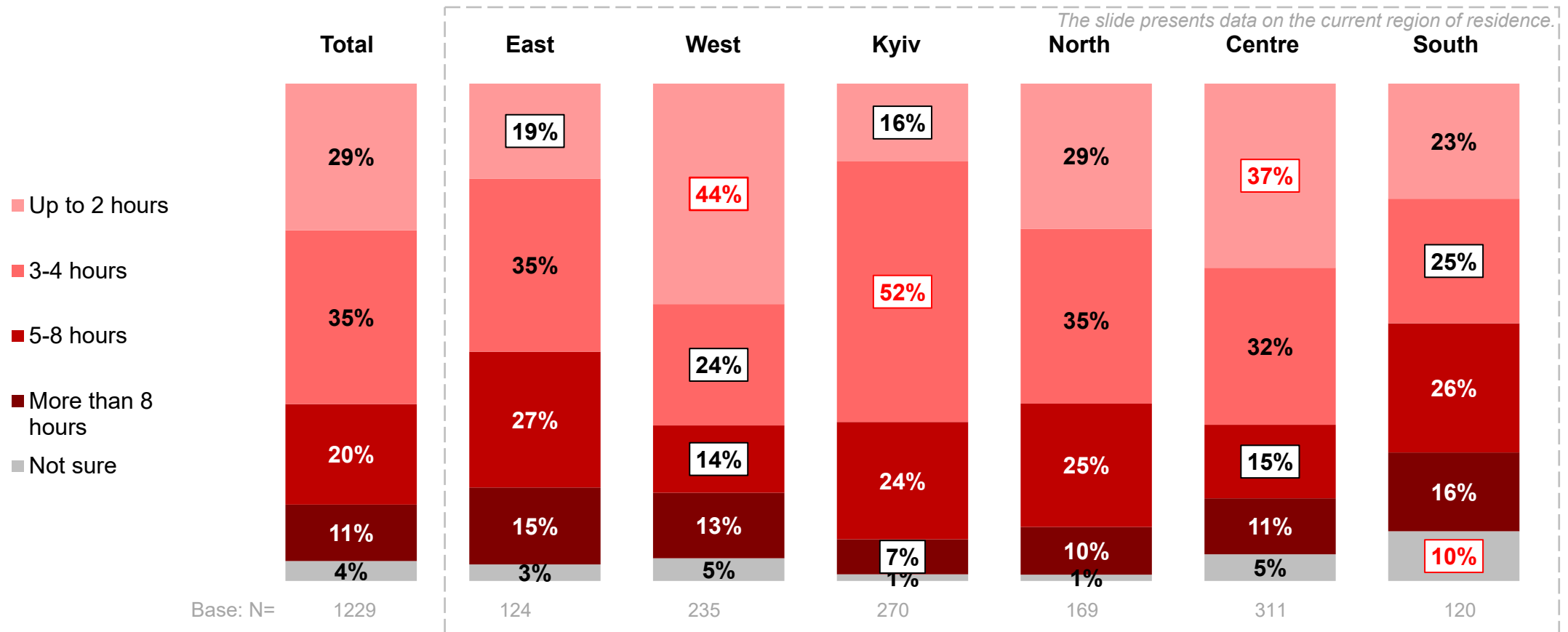
People who currently live in Kyiv, in the East, and in the North encountered power outages most often (83%, 79% and 74% vs 64%). People currently living in the West and South encountered outages less often than the sample as a whole (59% and 41% vs 64%).



AVERAGE DURATION OF LIGHT / POWER OUTAGES

by region (current region of residence)

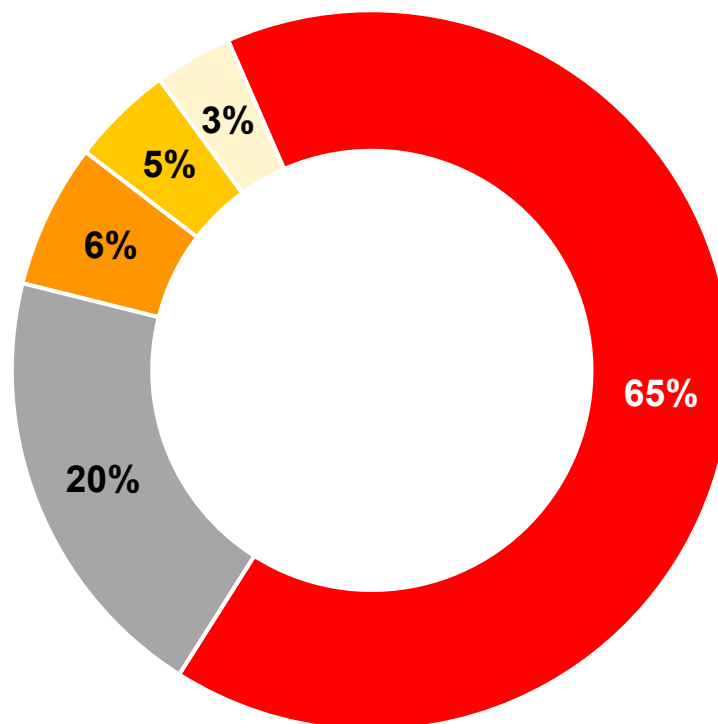
Respondents who currently live in Kyiv stated that the average duration of power outages was 3-4 hours more often than the sample as a whole (52% vs 35%), while residents of the West and the Centre more often indicated its duration up to 2 hours (44% and 37% vs 29%).



DESIRE TO MIGRATE IN CASE OF POWER OUTAGES IN THE COLD SEASON

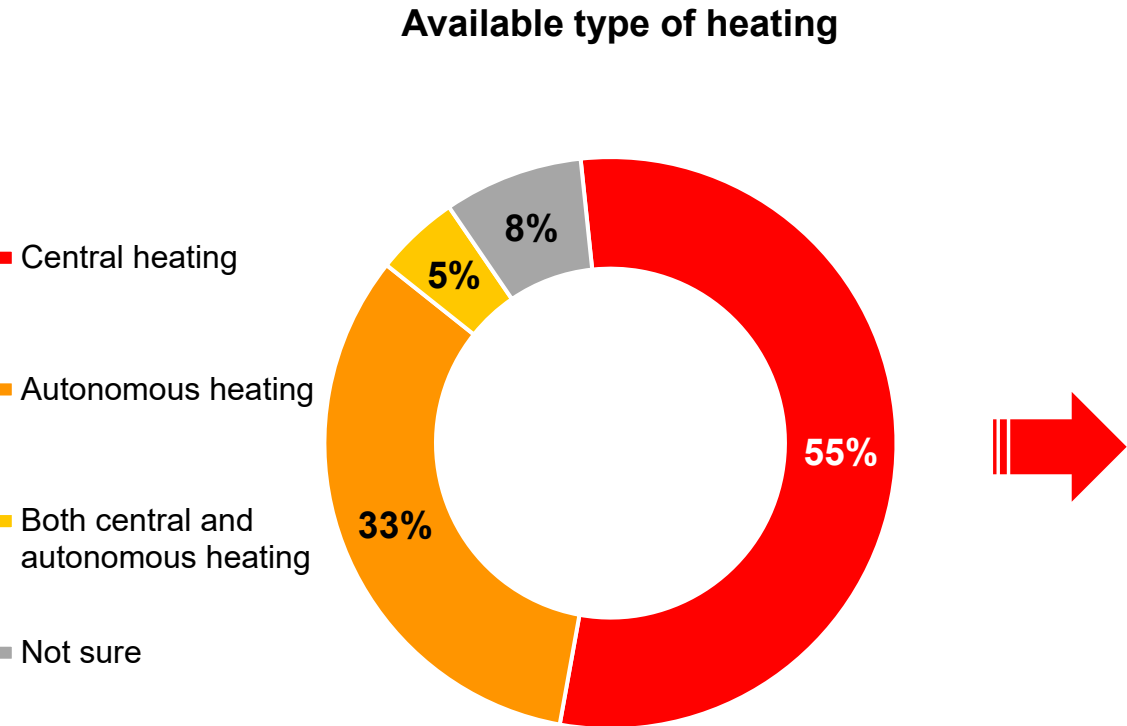
65% of respondents will remain at their current place of residence in case of no electricity in the cold season.

- Yes, will relocate to another locality within the oblast
- Yes, will relocate to another oblast of Ukraine
- Yes, will relocate abroad
- No, will stay at their current place of residence
- Not sure

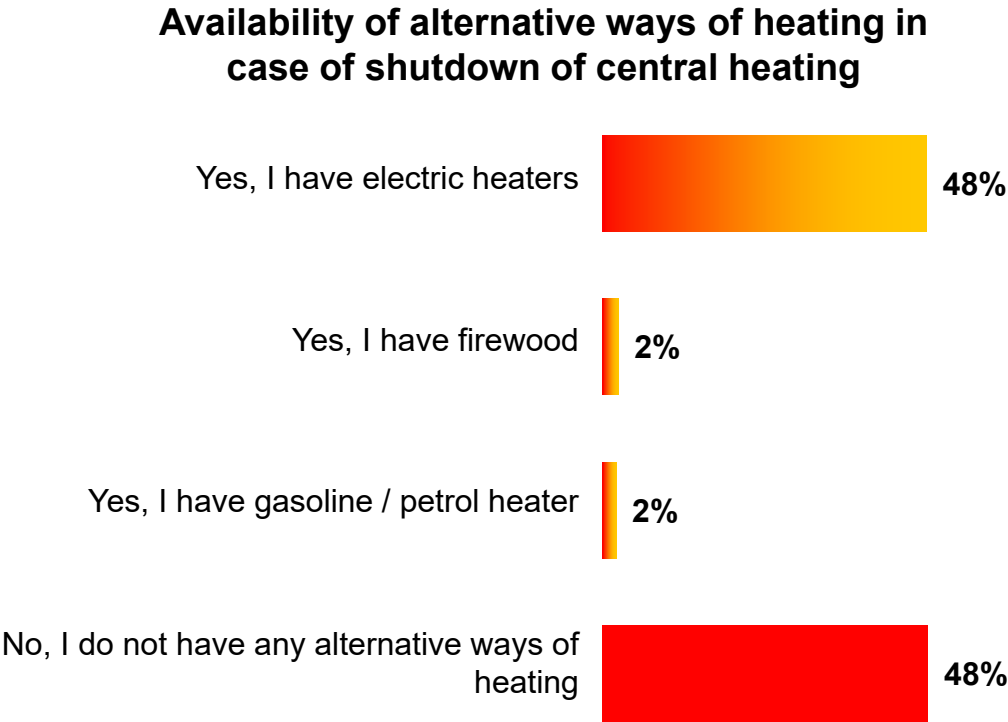


TYPE OF THE HEATING OF ACCOMMODATION AND THE PRESENCE OF ALTERNATIVE WAYS OF HEATING

More than half of respondents (55%) declare that the heating of their homes depends exclusively on the central heating, while 33% report that the heating of their houses depends exclusively on autonomous heating, and 5% have the opportunity to use both. Among those who use central heating, 48% of respondents declare the absence of any alternative methods of heating the home in the event of a shutdown of central heating, while those who have them mostly note the presence of electric heaters (48%).



Base: respondents currently living in Ukraine, N=1923



Base: respondents who currently live in Ukraine and have only central heating, N=1072

AVERAGE TEMPERATURE OF ACCOMMODATION

The reported average temperature of the accommodation is significantly lower than the temperature that the respondents consider comfortable for themselves - 17.7°C vs 21.2°C.

17,7 °C

**Available average
temperature**

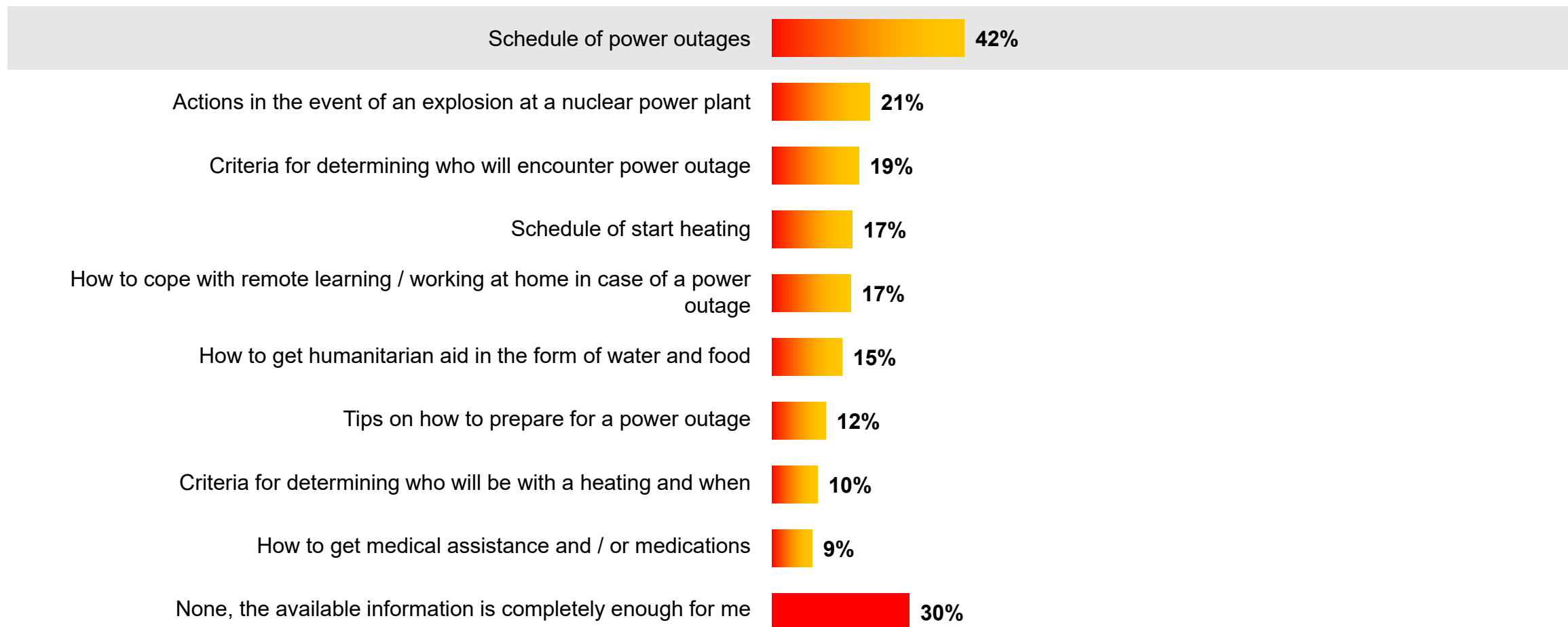
21,2 °C

**Comfortable average
temperature**



THE NEED FOR PRACTICAL INFORMATION REGARDING ELECTRICITY AND HEATING

The schedule of power outages is the most necessary practical information which 42% of respondents lack.

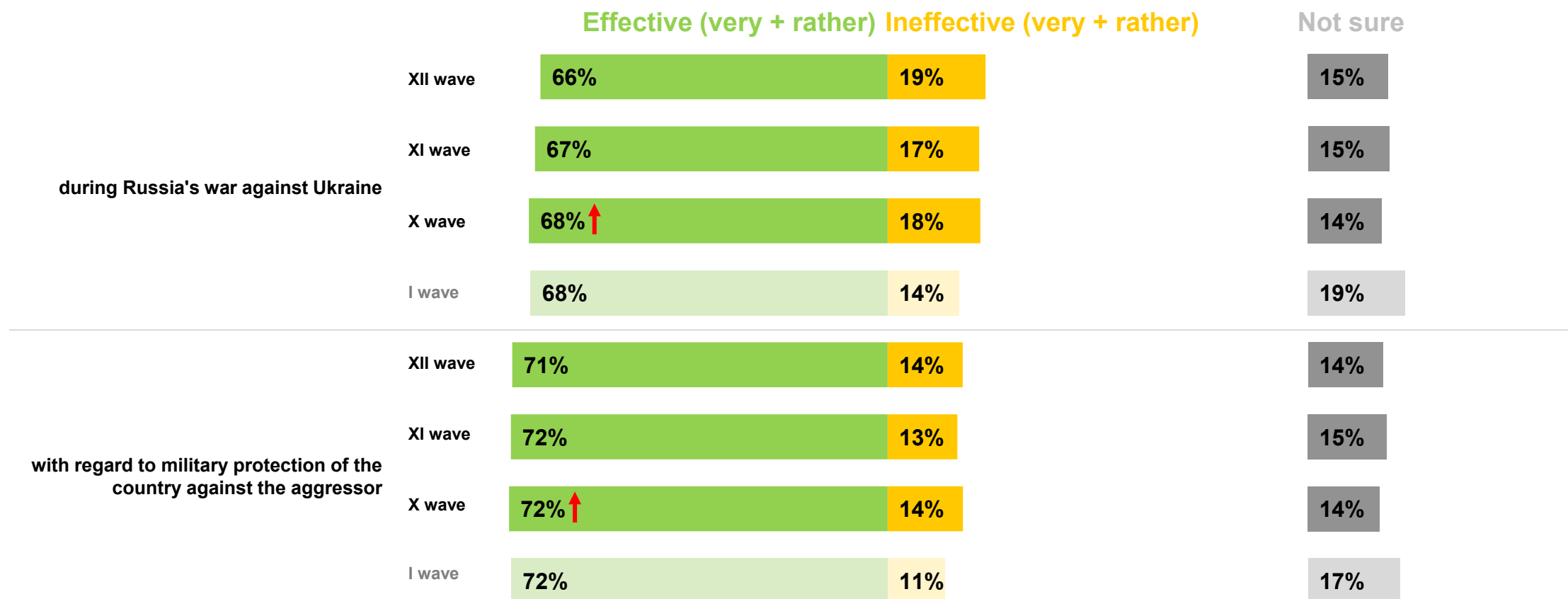


PERCEPTION OF THE FULL-SCALE WAR WITH RUSSIA




EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES...

In the twelfth 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 have not significantly changed and remain at a high level: 66-71%.



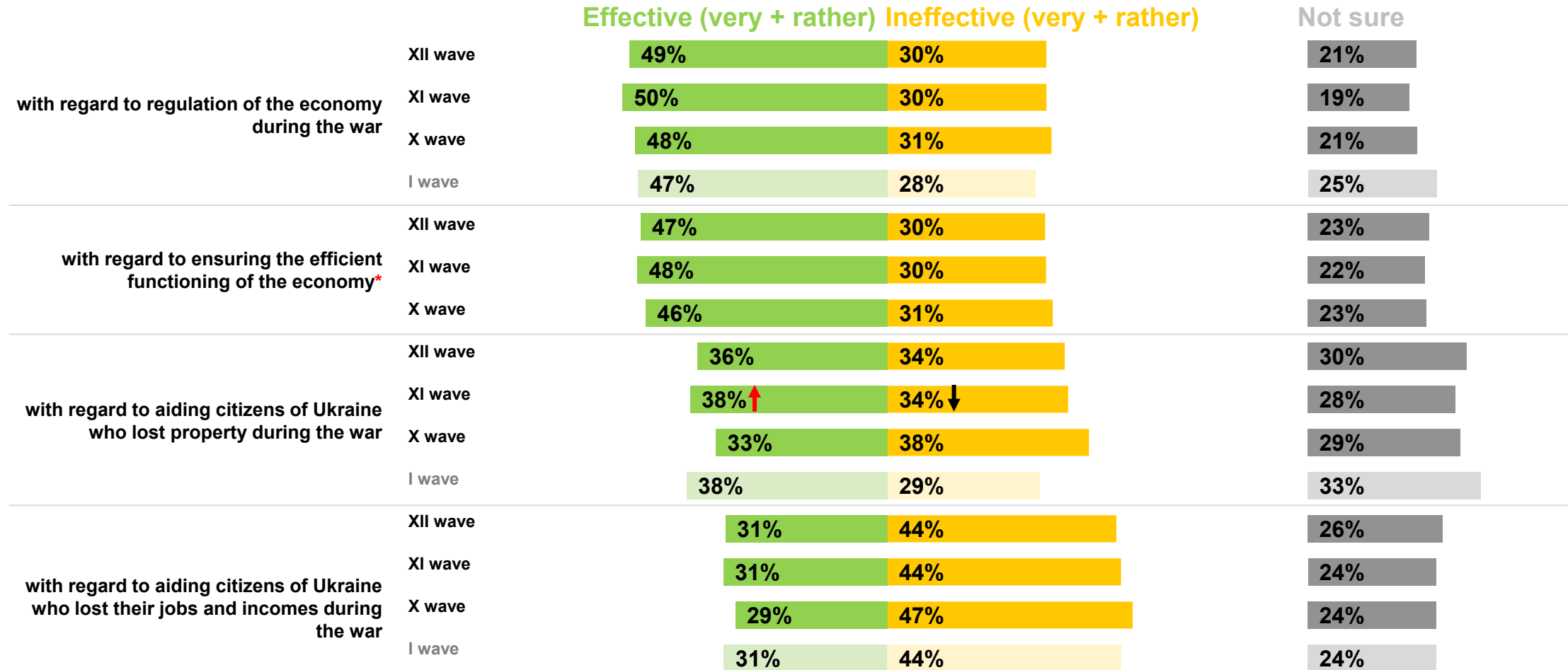
Base: all respondents; I wave – N = 2083, X wave – N = 2000, XI wave – N = 2060, XII wave – N = 2000.

How effective do you consider the actions of the Ukrainian authorities: during Russia's war against Ukraine / with regard to military protection of the country from the aggressor?

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

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES...

The assessment of the actions of the Ukrainian authorities in the spheres of the economy has not changed significantly in the current wave: almost half (47-49%) of respondents consider such actions to be effective. Assessments of the effectiveness of the government's actions with regard to aiding those who lost their jobs and those who lost their property also did not change - they are at the level of 31% - 36%, respectively.



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

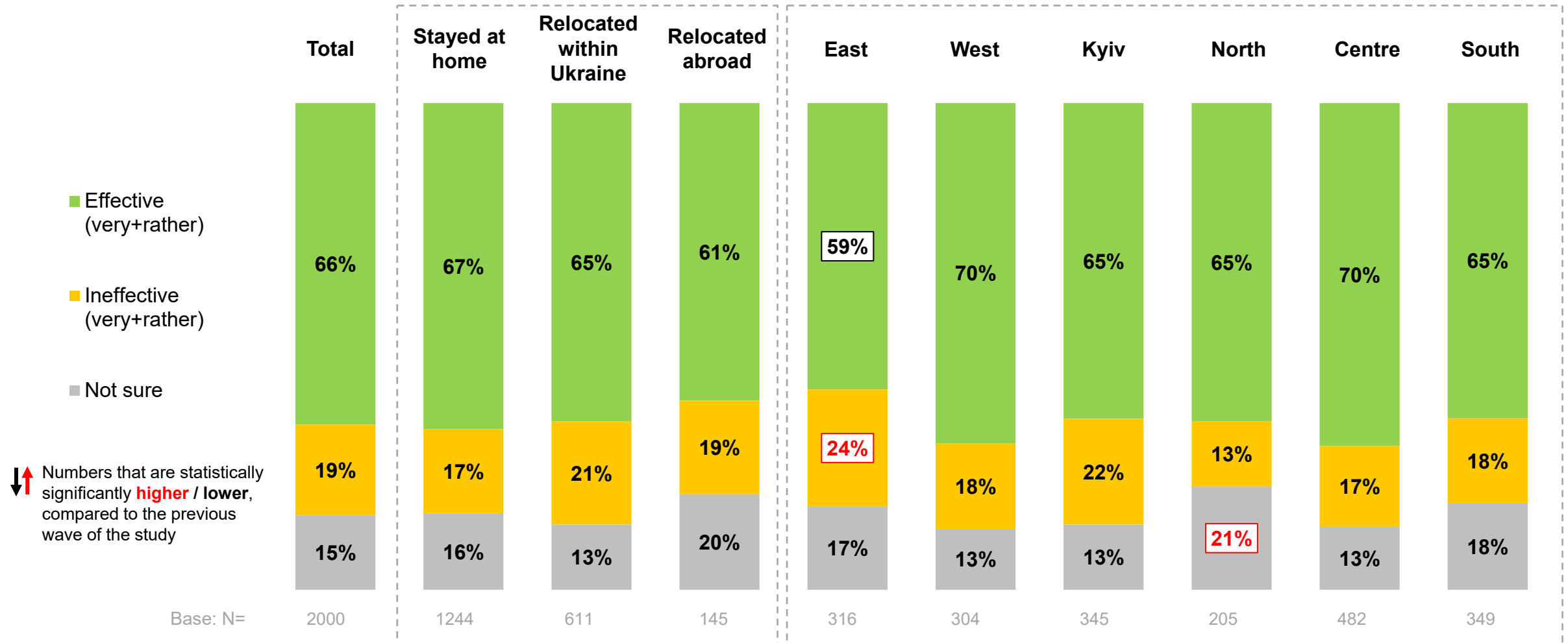
How effective do you consider the actions of the Ukrainian authorities: with regard to regulation of the economy during the war / with regard to ensuring the efficient functioning of the economy* / with regard to aiding citizens of Ukraine who lost property during the war / with regard to aiding citizens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



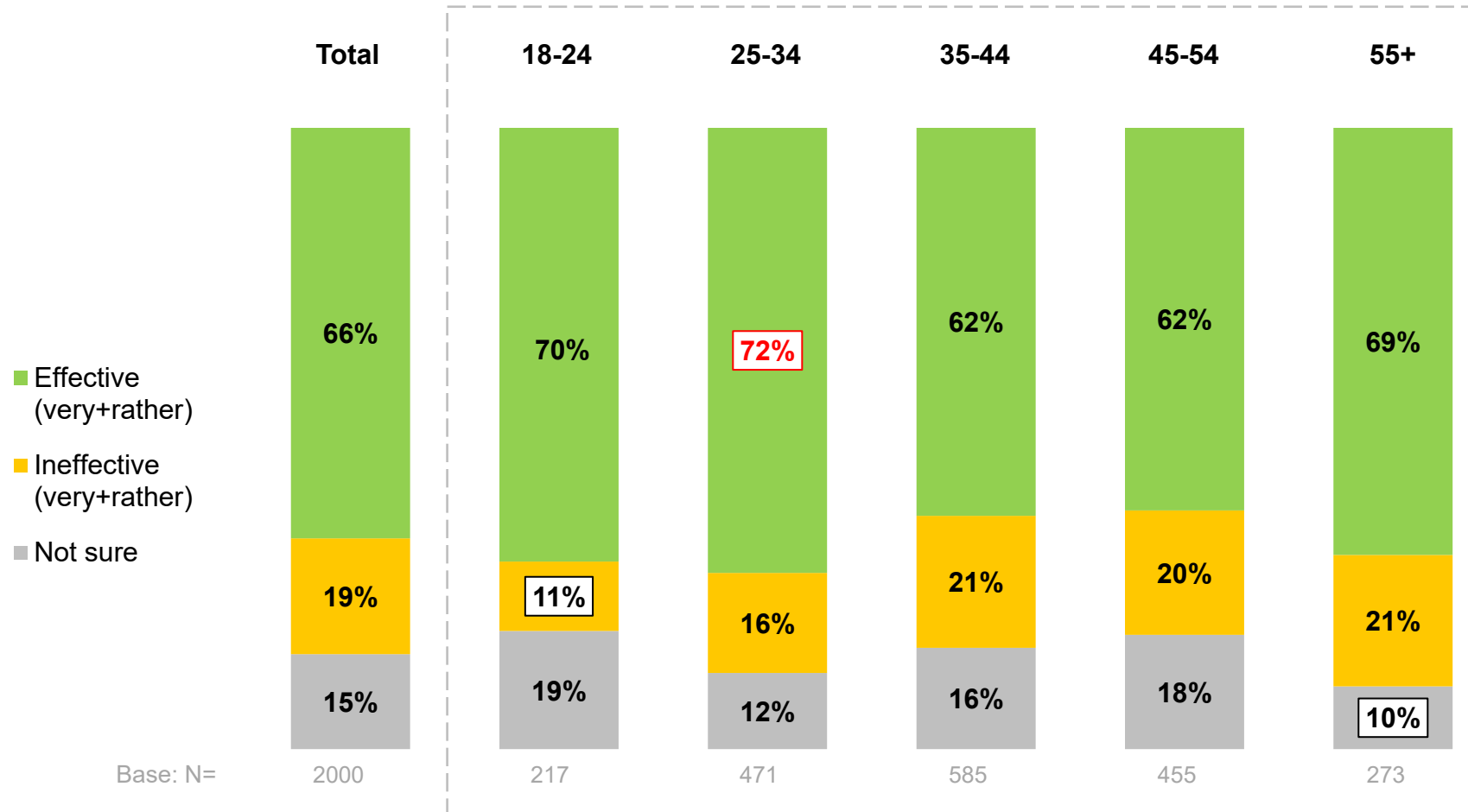
Centre for
Economic
Recovery



Advanter



MOVING FORWARD
TOGETHER



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

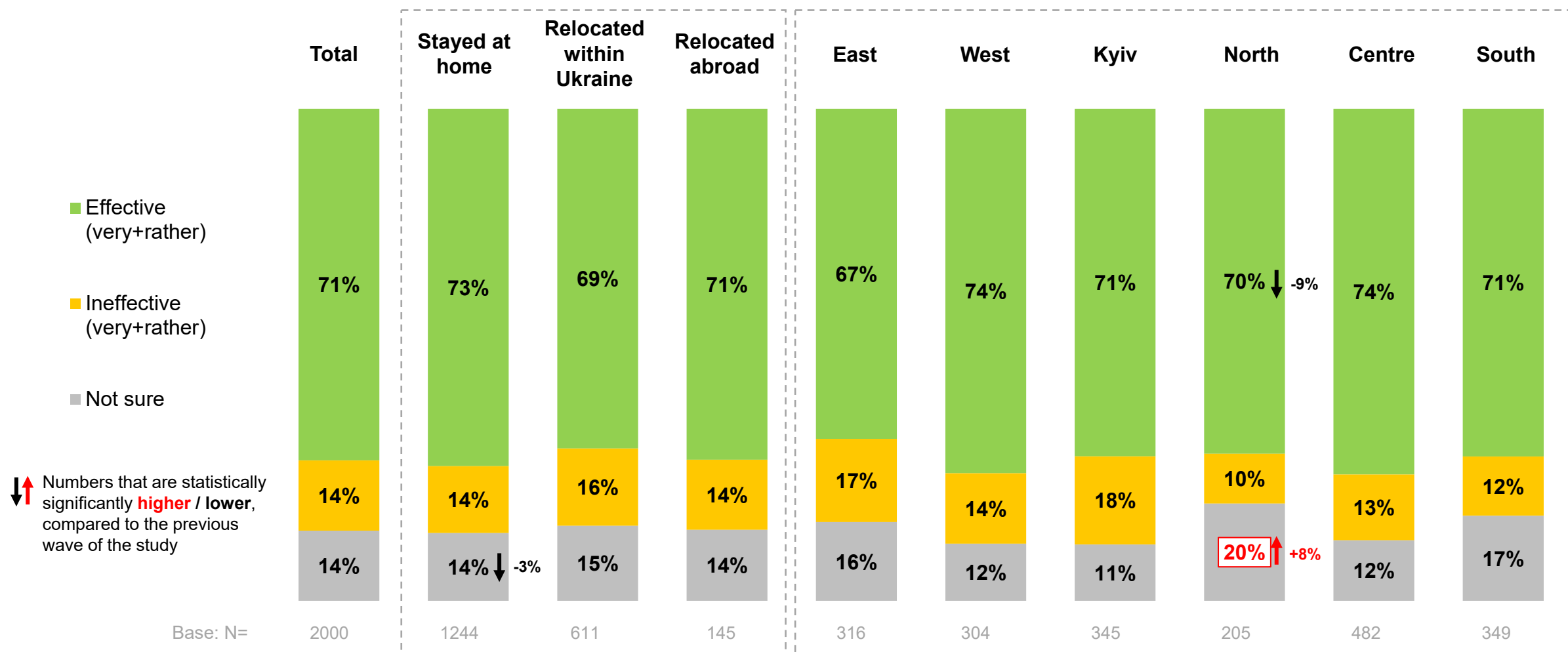
□ □ Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

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

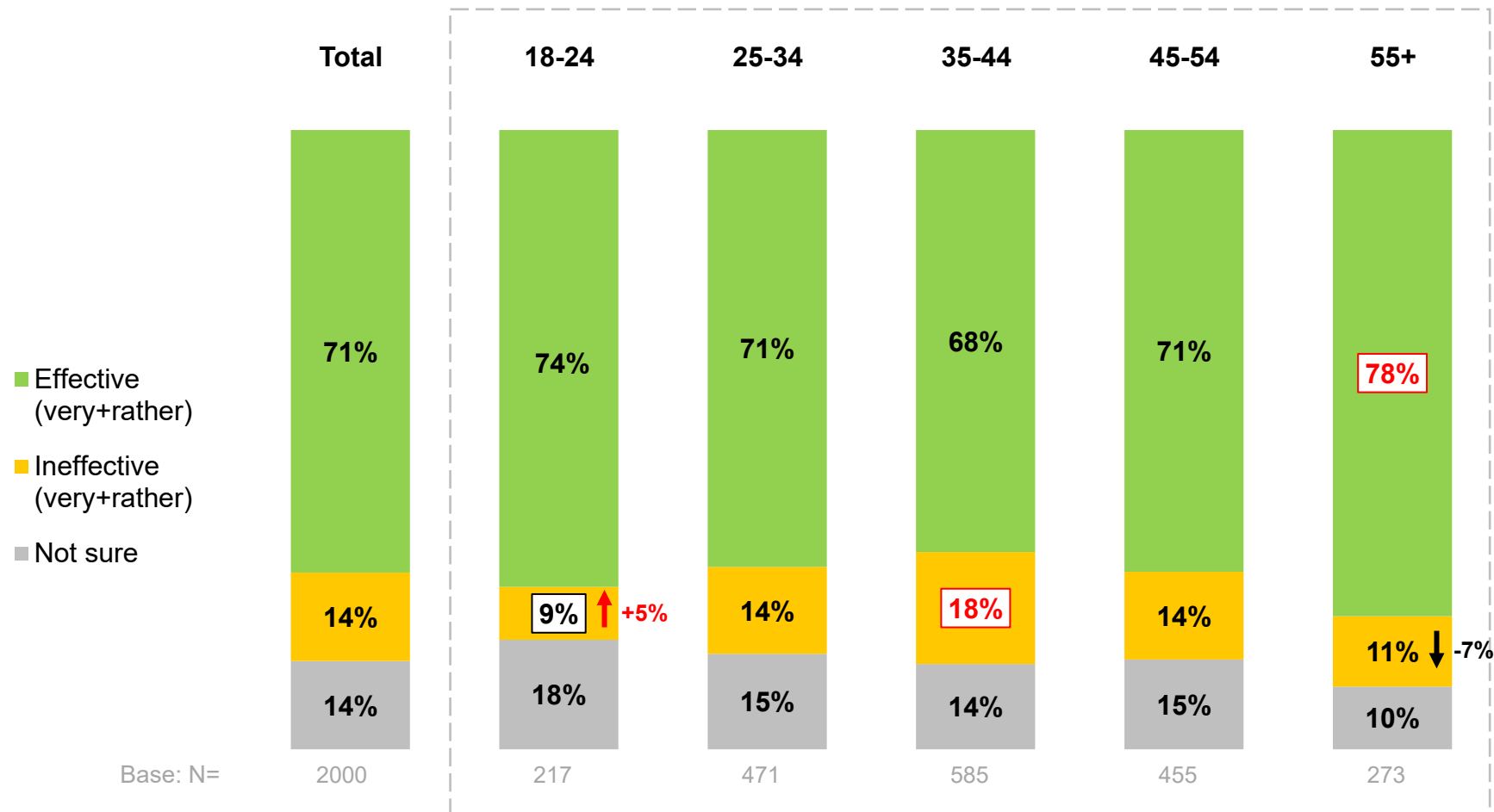
How effective do you consider the actions of the Ukrainian authorities with regard to military protection of the country from the aggressor?

Numbers that are statistically significantly **higher** / **lower** a group, 50 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

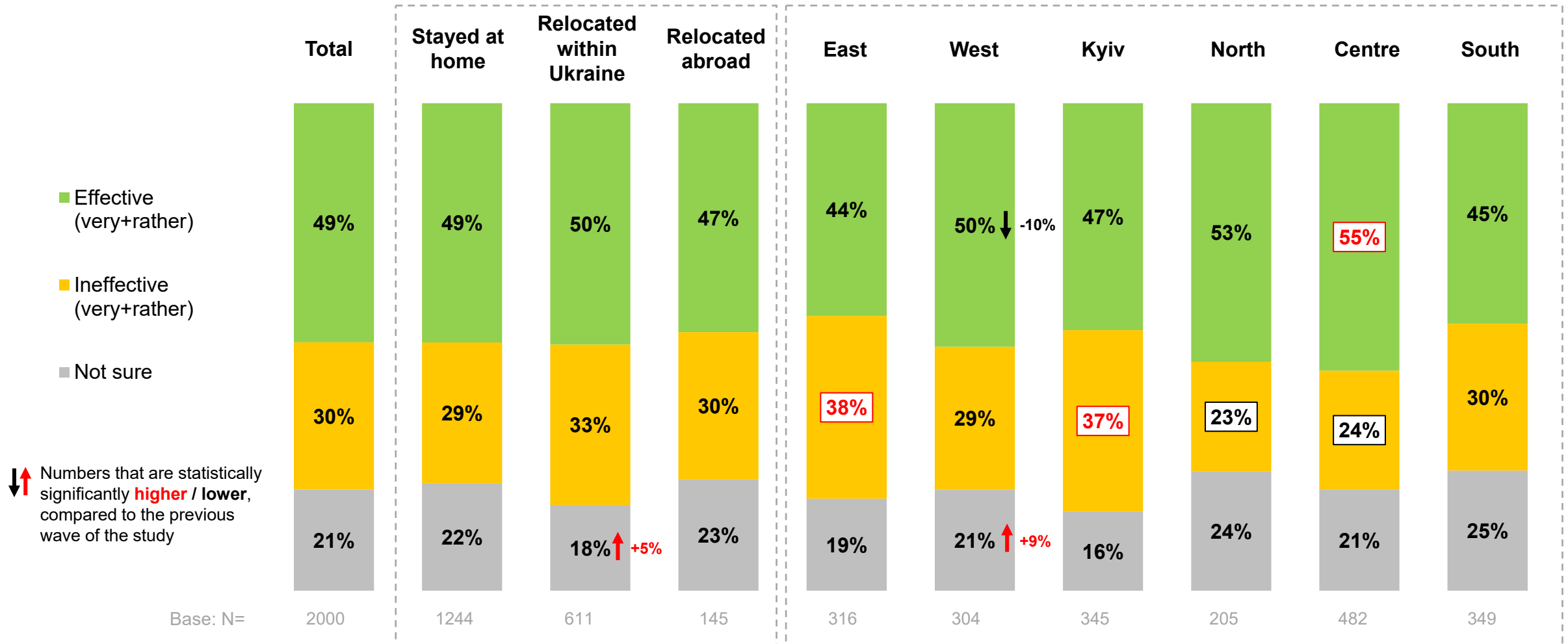
How effective do you consider the actions of the Ukrainian authorities with regard to military protection of the country from the aggressor?

↑ 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, 52 compared to the sample as a whole

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

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

by age



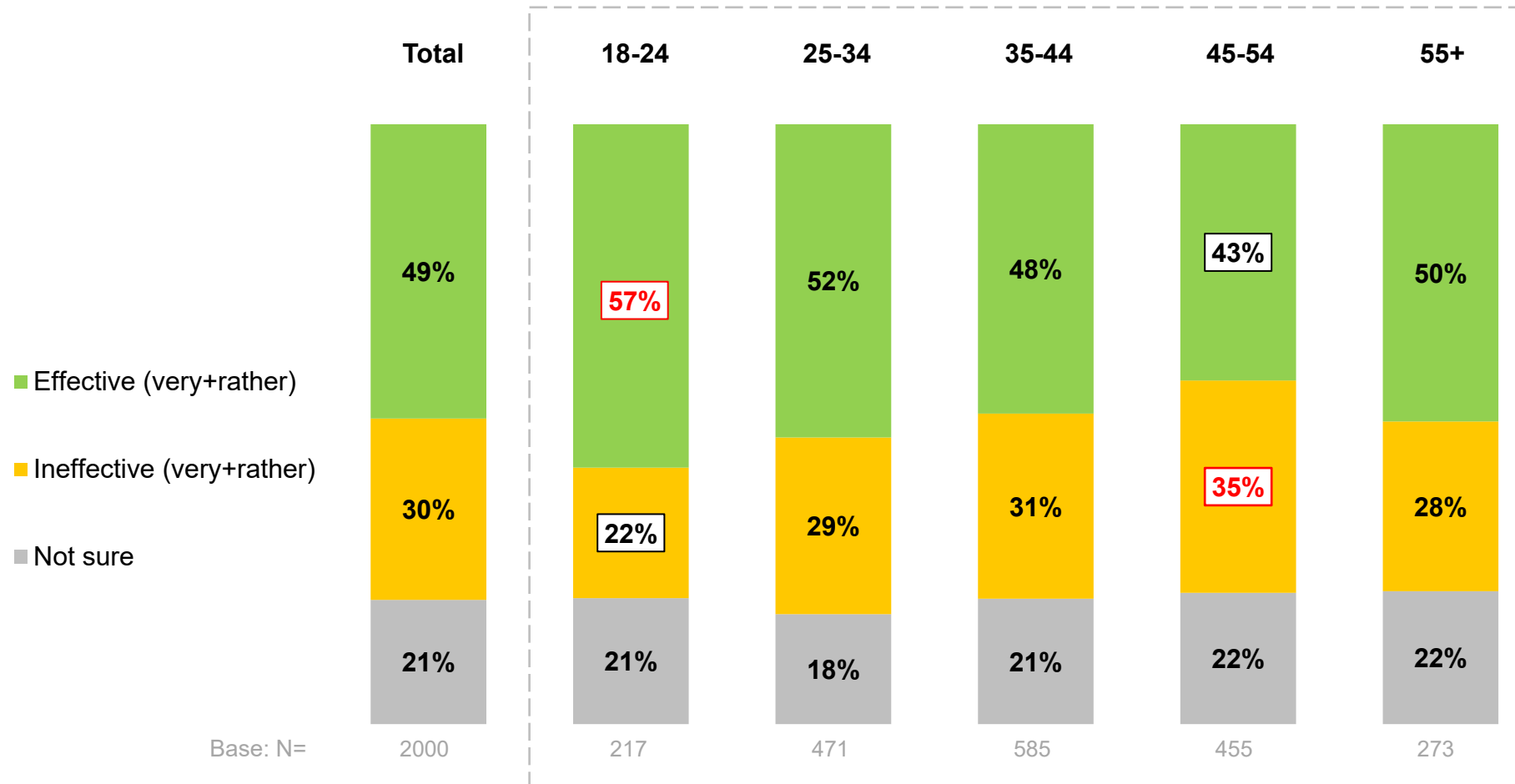
Centre for
Economic
Recovery



Advanter



MOVING FORWARD
TOGETHER



Base: all respondents

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

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

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

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

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



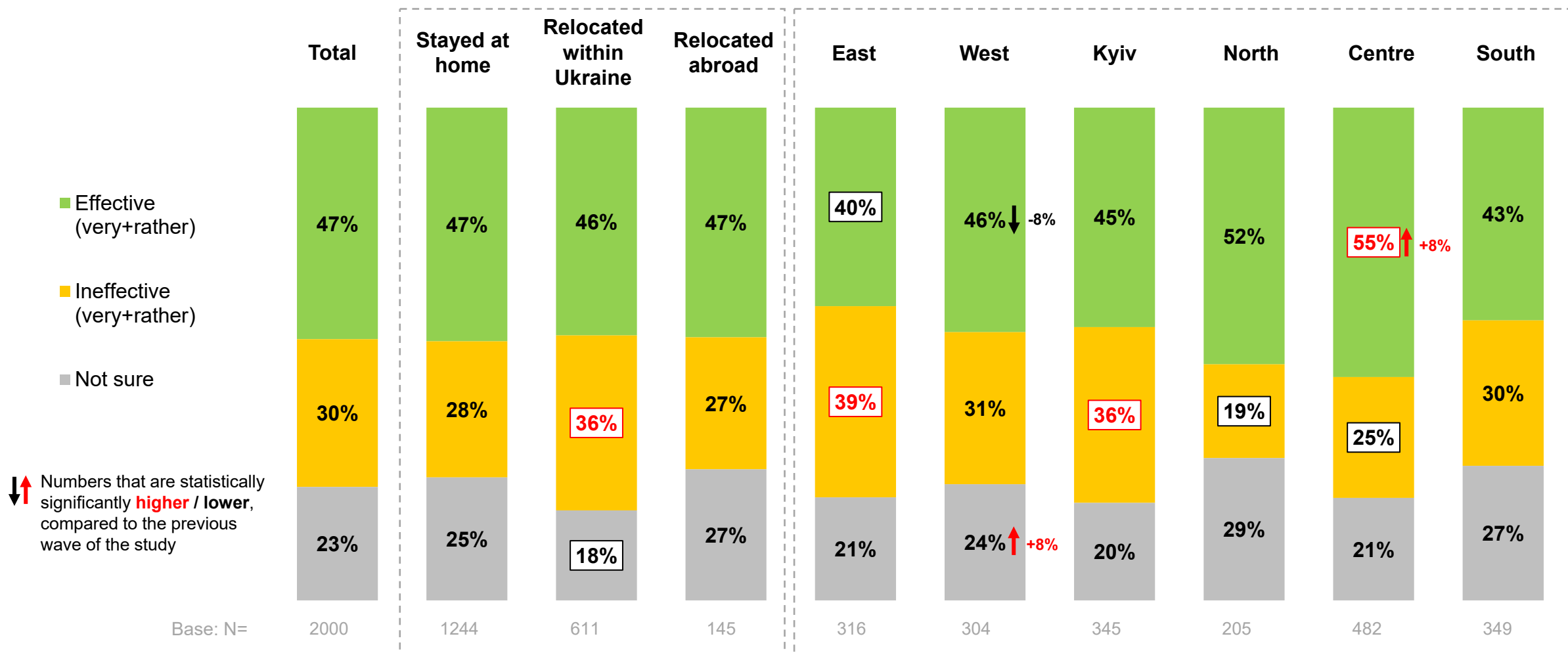
Centre for
Economic
Recovery



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, 54 compared to the sample as a whole

EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES

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



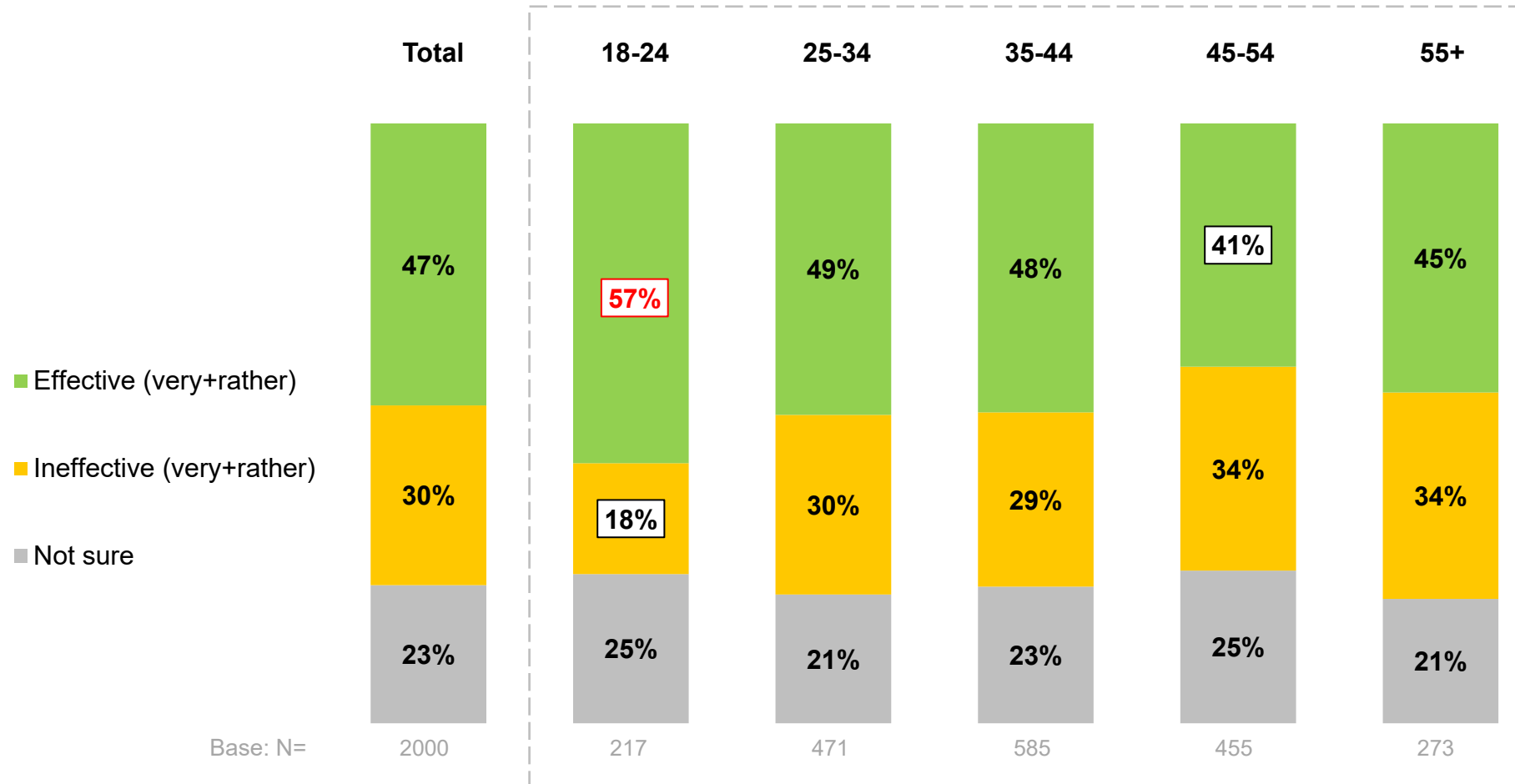
Centre for
Economic
Recovery



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?

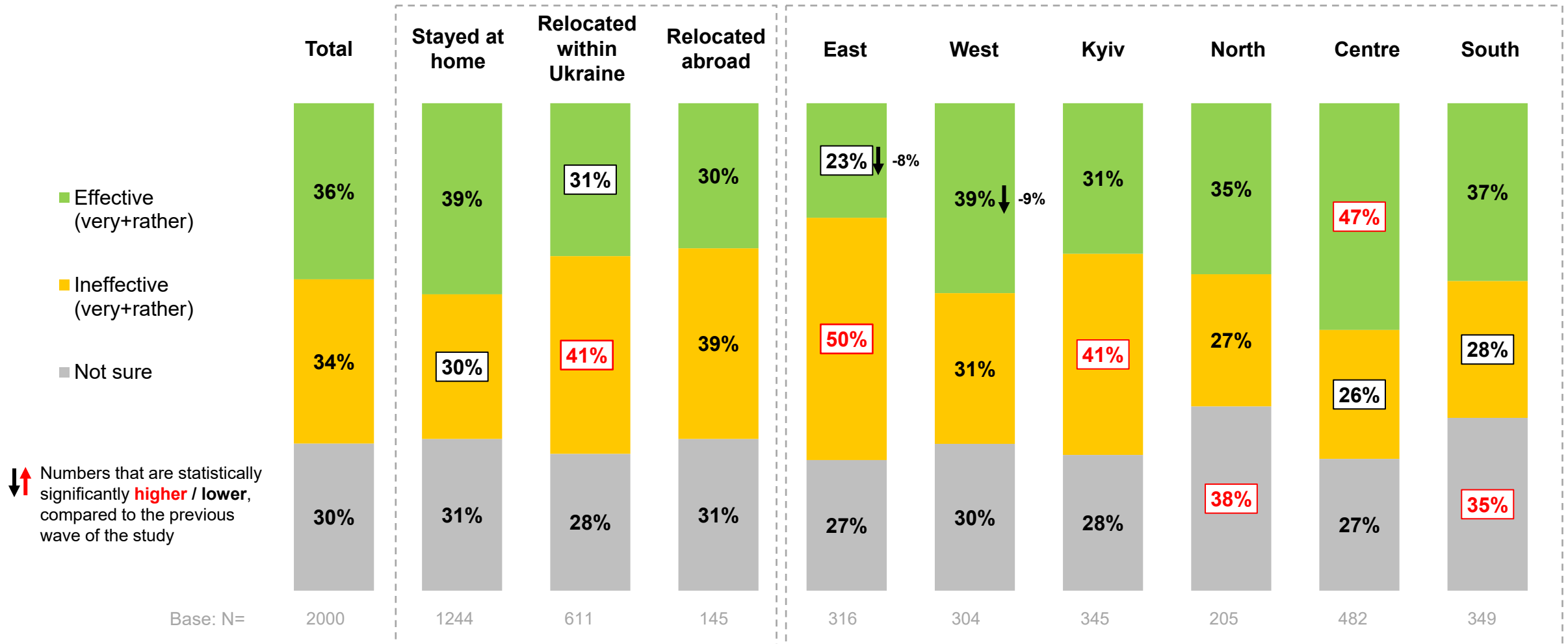
↓ ↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

□ 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**



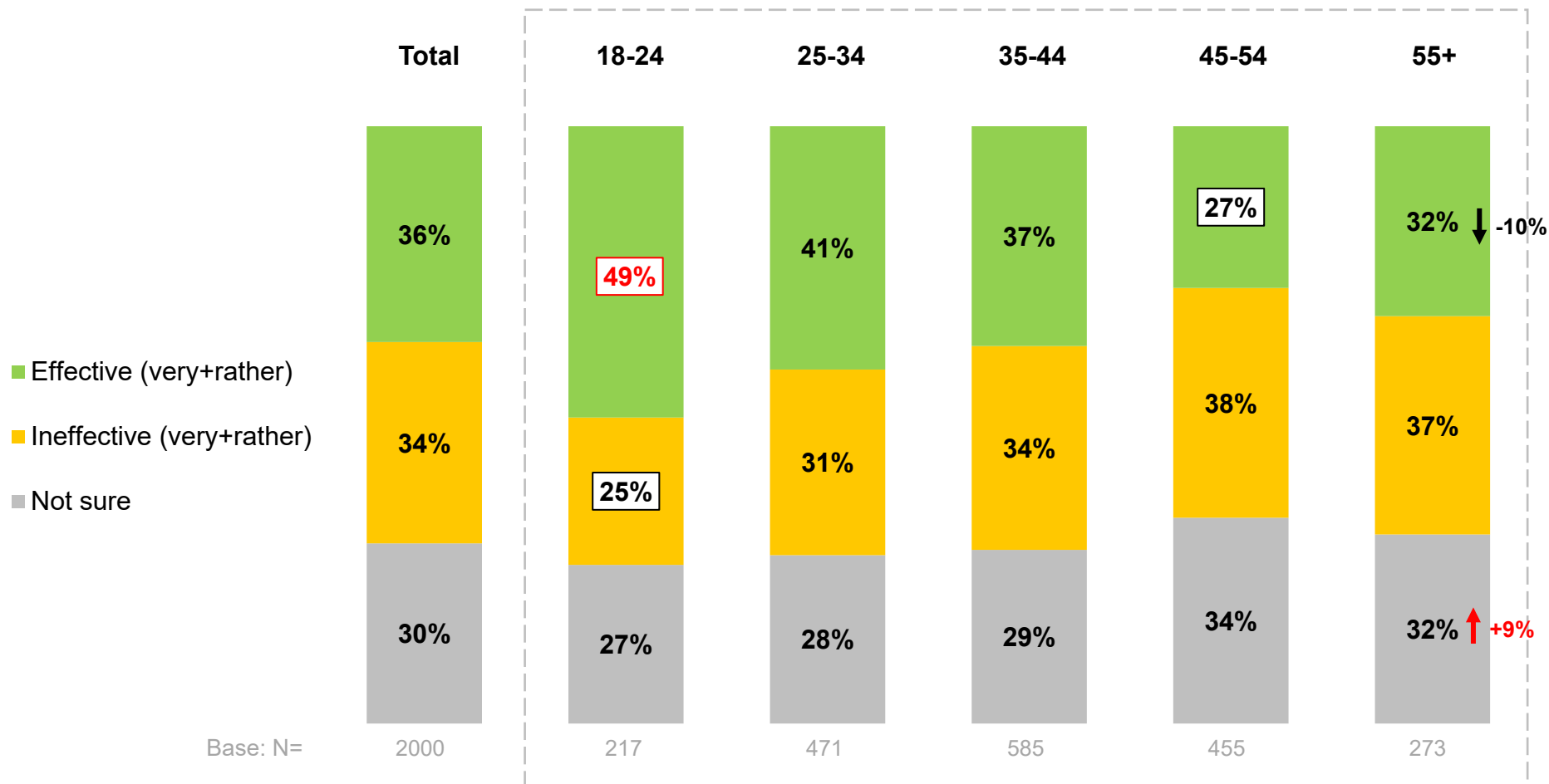
Base: all respondents

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, 56 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?

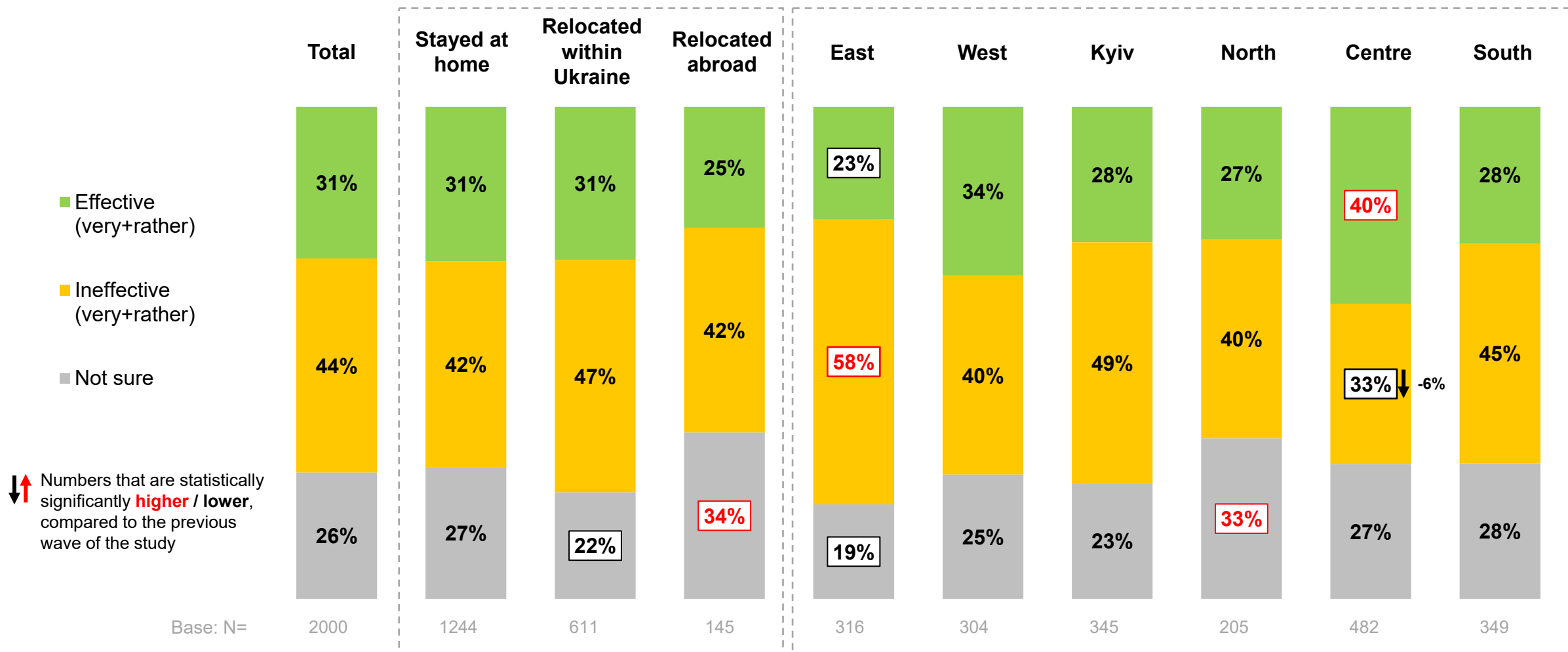
↓ ↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

▢ 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

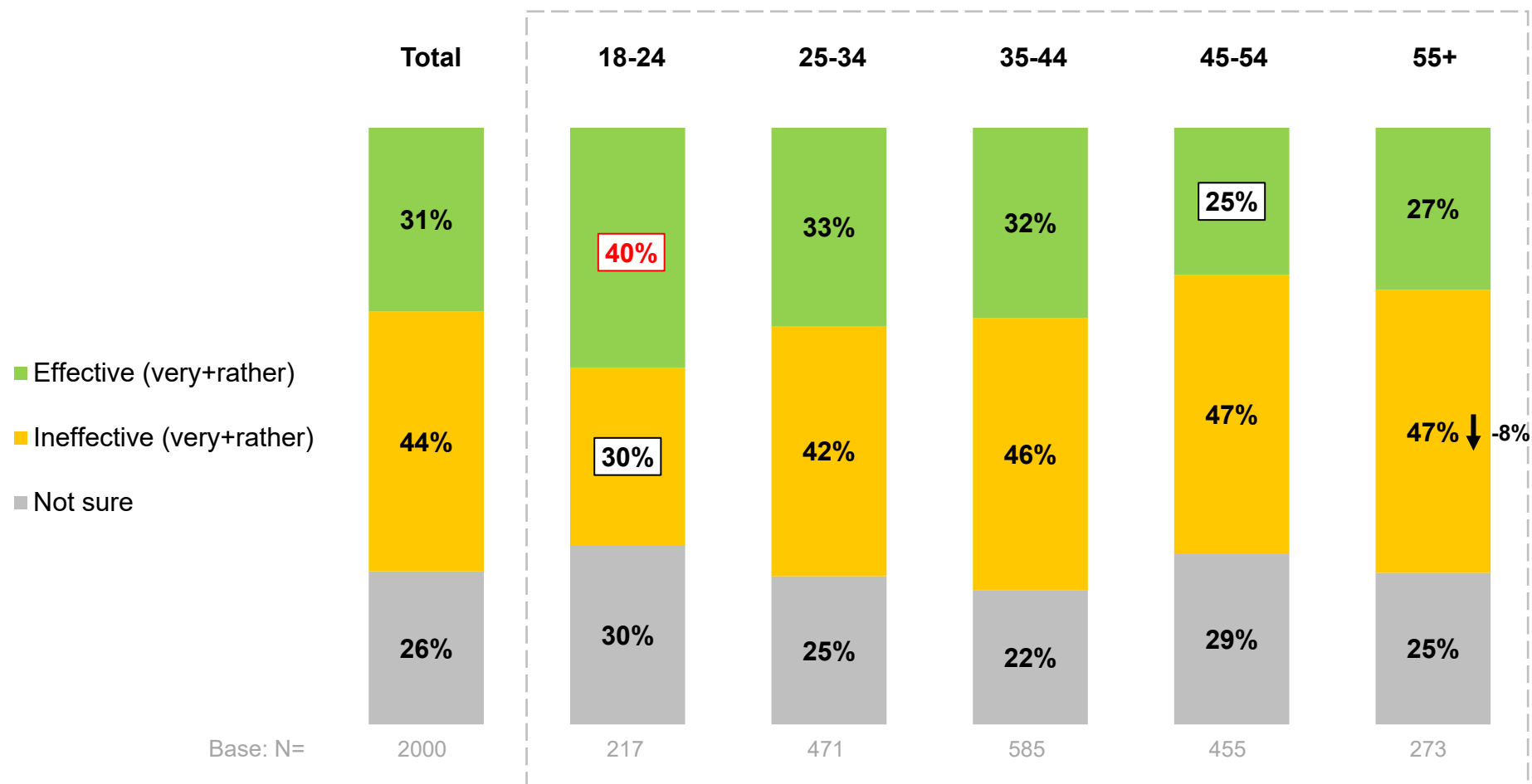
How effective do you consider the actions of the Ukrainian authorities with regard to aiding citizens of Ukraine who lost their job and income during the war?

Numbers that are statistically significantly **higher** / **lower** for a group, 58 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 (65%), the President of Ukraine (47%) and volunteer organizations (26%); moreover, trust in the Armed Forces of Ukraine is currently at the highest level since the beginning of the study. There were no recorded significant changes compared to the previous wave.

	I wave (20-22.05) N=2083	X wave (23-26.09) N=2000	XI wave (7-10.10) N=2060	XII wave (21-24.10) N=2000
Armed Forces of Ukraine	62%	58%↓	64%↑	65%
President of Ukraine	49%	42%	44%	47%
Volunteer organizations	35%	22%↓	26%↑	26%
Doctors	24%	13%	15%	15%
Charitable organizations	15%	13%	15%↑	14%
International organizations*		14%	13%	13%
National Police of Ukraine	16%	9%↓	12%↑	10%
Government of Ukraine	13%	8%	9%	10%
Church	10%	10%	9%	9%
Media*		5%↓	6%	5%
Verkhovna Rada of Ukraine	7%	5%	4%	5%
National Bank of Ukraine	7%	4%	4%	3%
Ministry of Finance of Ukraine	4%	2%	3%	2%
State Customs Service of Ukraine	3%	2%	2%	2%
State Tax Service	2%	1%	2%	2%
Courts	2%	1%	1%	2%
None of the above	7%	10%↑	8%↓	8%

*were added in 7th wave of survey

Base: all respondents

Which of the following institutions do you trust?

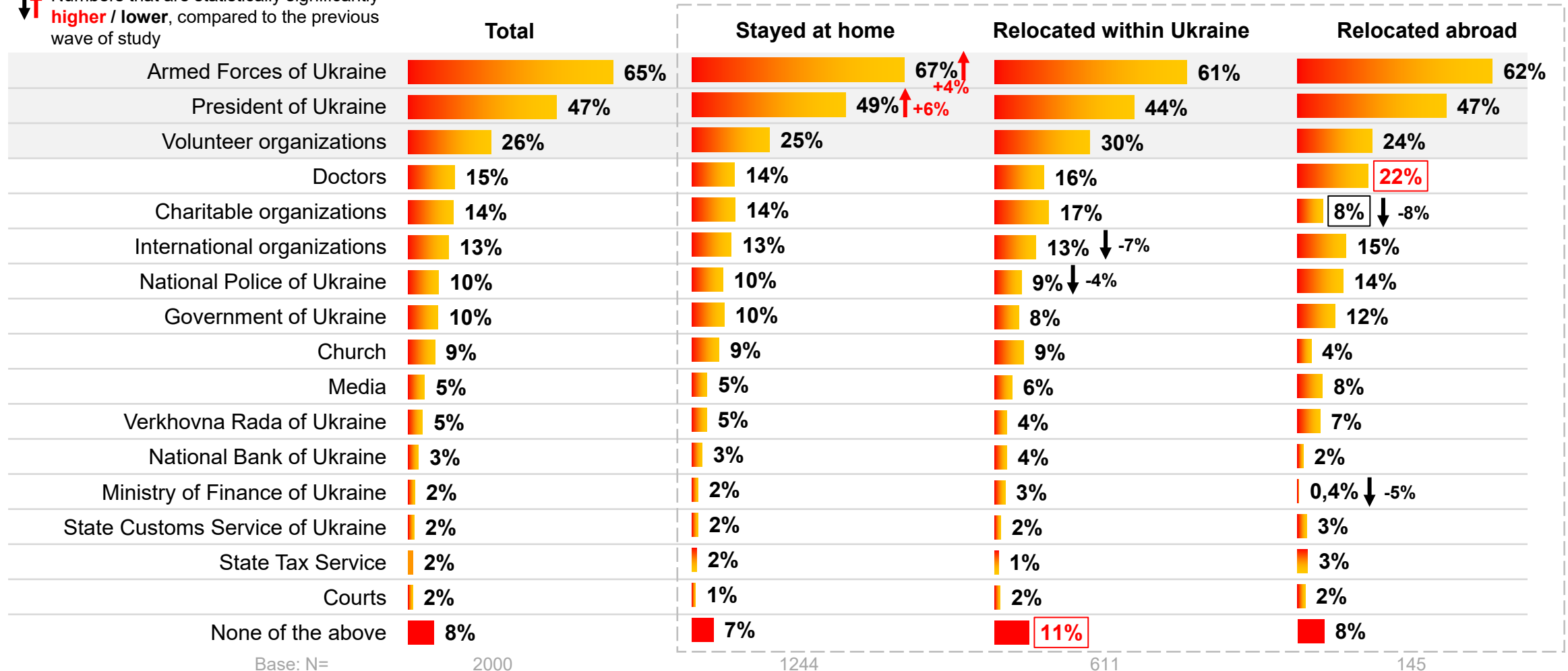
↓↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

TRUST IN INSTITUTIONS

by migration status

The twelfth wave stands out by both the small number of differences between the various groups and the small number of changes compared to the previous wave: external migrants slightly more trust in doctors and slightly less - charitable organizations (the latter indicator decreased in the twelfth wave).

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



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

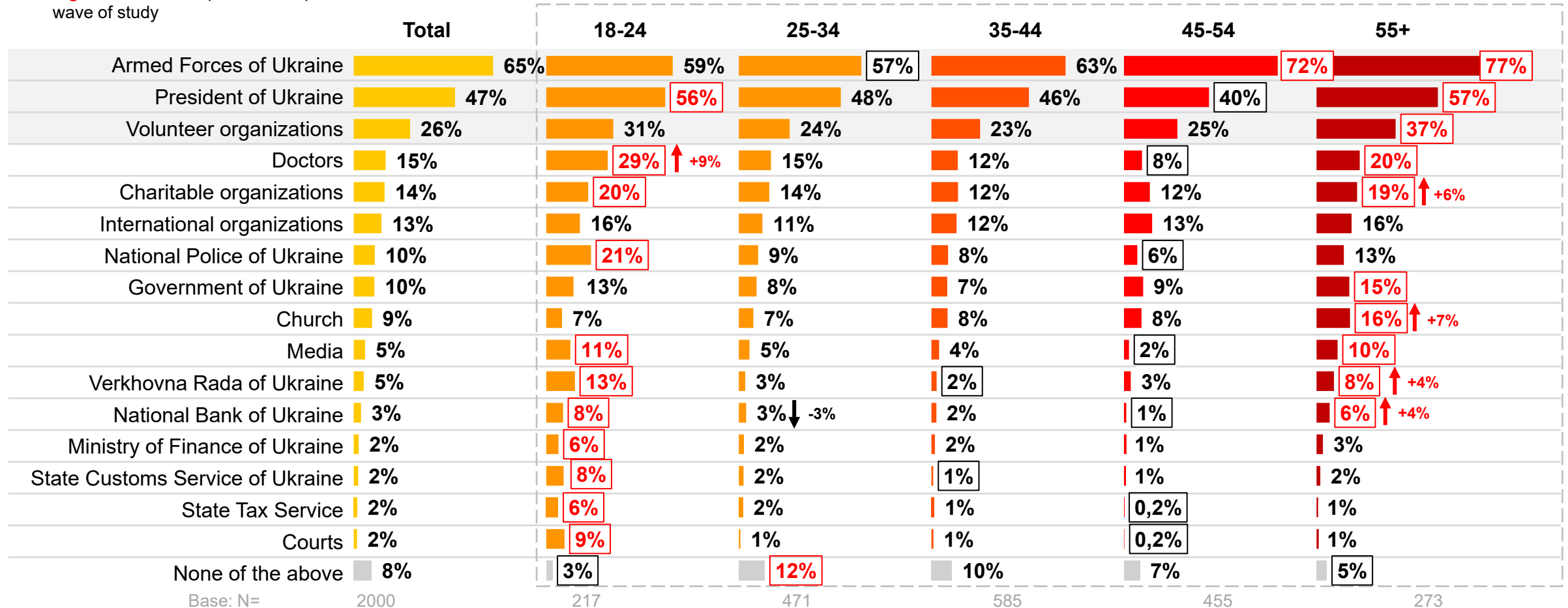
Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

TRUST IN INSTITUTIONS

by age

Respondents aged 18-24 and 55+ trust a large number of institutions significantly more than other age groups; compared to the previous wave, the trust of these groups in certain institutions has slightly increased.

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



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

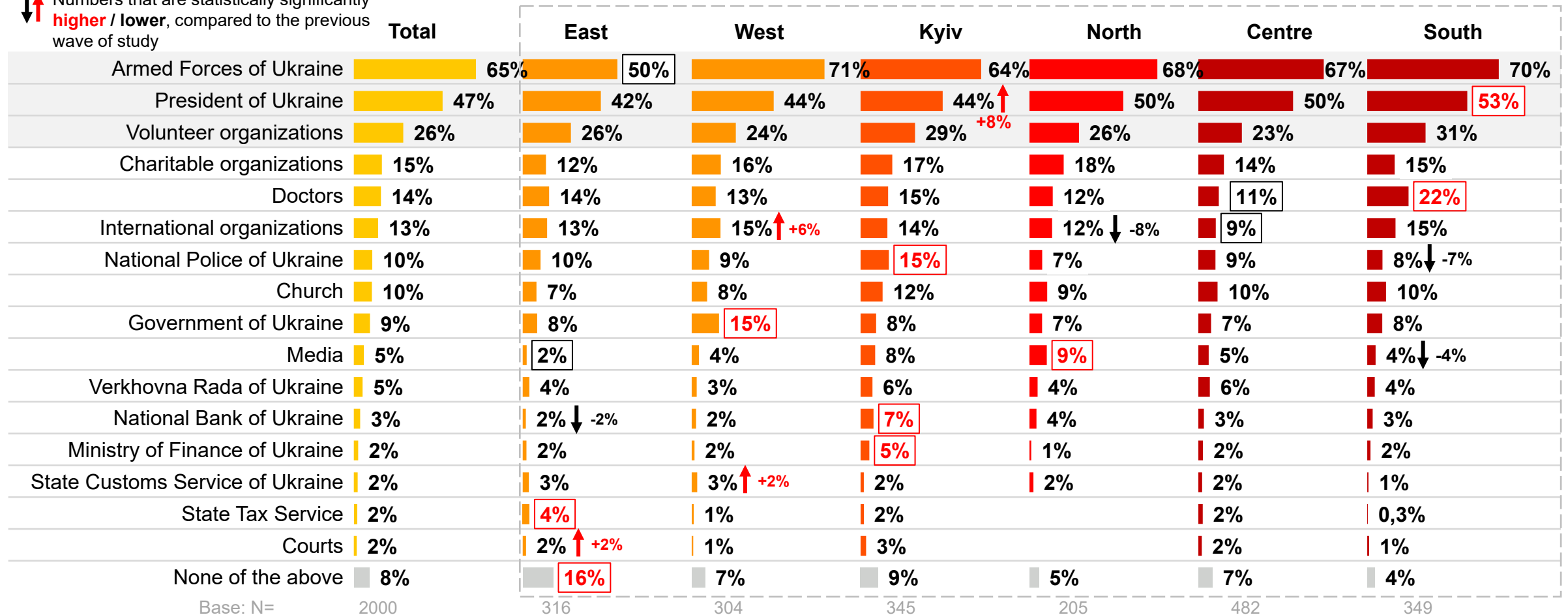
Numbers that are statistically significantly **higher** / **lower** for the age group, compared to the sample as a whole

TRUST IN INSTITUTIONS

by region

The institution in which people from the East trust the least is the Armed Forces of Ukraine – there is only half of the respondents who express trust in the Armed Forces of Ukraine. The highest level of trust in the Government is among residents of the West (15%, and this indicator is significantly higher than the indicator of the country as a whole).

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

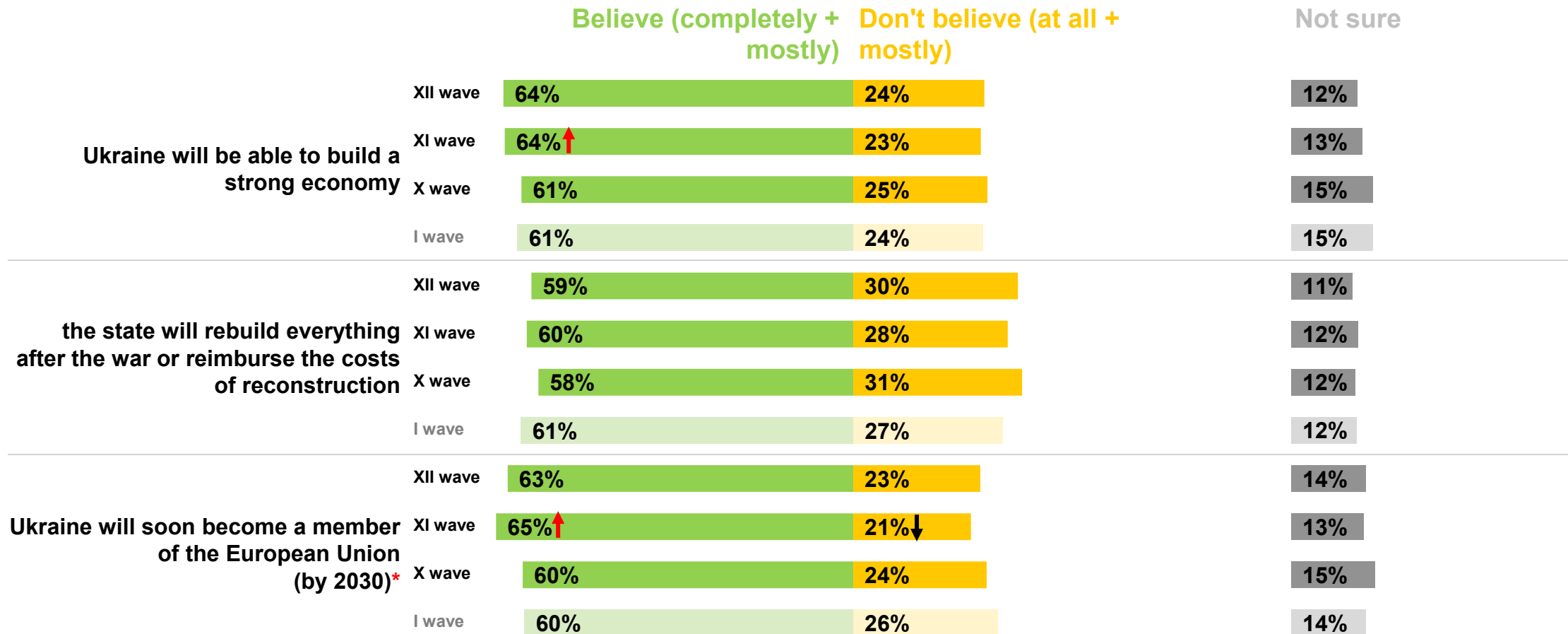


Base: all respondents
 Which of the following institutions do you trust?

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 Ukraine will be able to build a strong economy, rebuild everything destroyed after the war and become a member of the EU in the near future remains without significant changes and is at a high level of 59-64%.



*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, X wave – N = 2000, XI wave – N = 2060, XII wave – N = 2000.

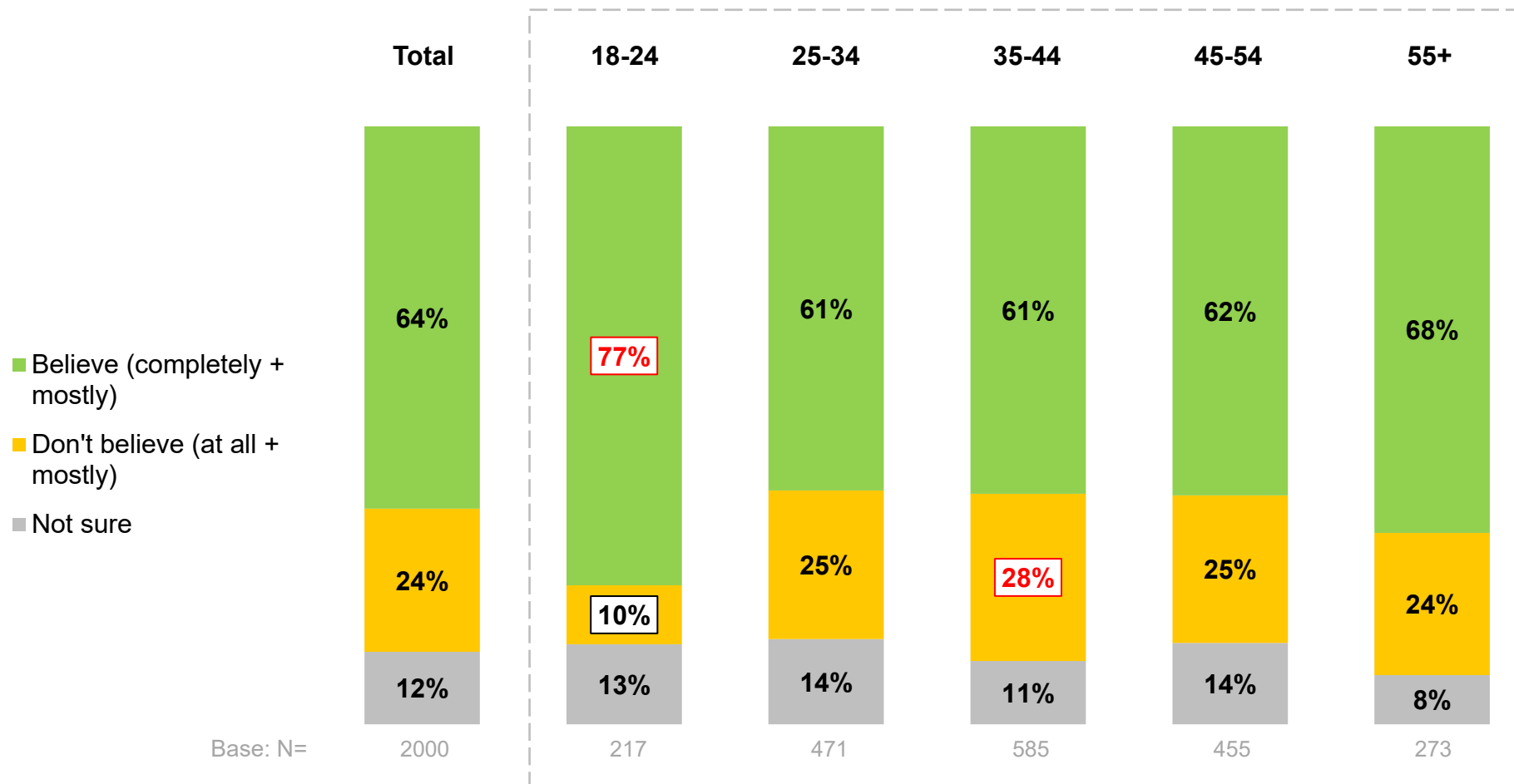
Do you believe that : Ukraine will be able to build a strong economy / the state will rebuild everything after the war or reimburse the costs of reconstruction / Ukraine will soon become a member of the European Union (by 2030)?

↓↑ 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;

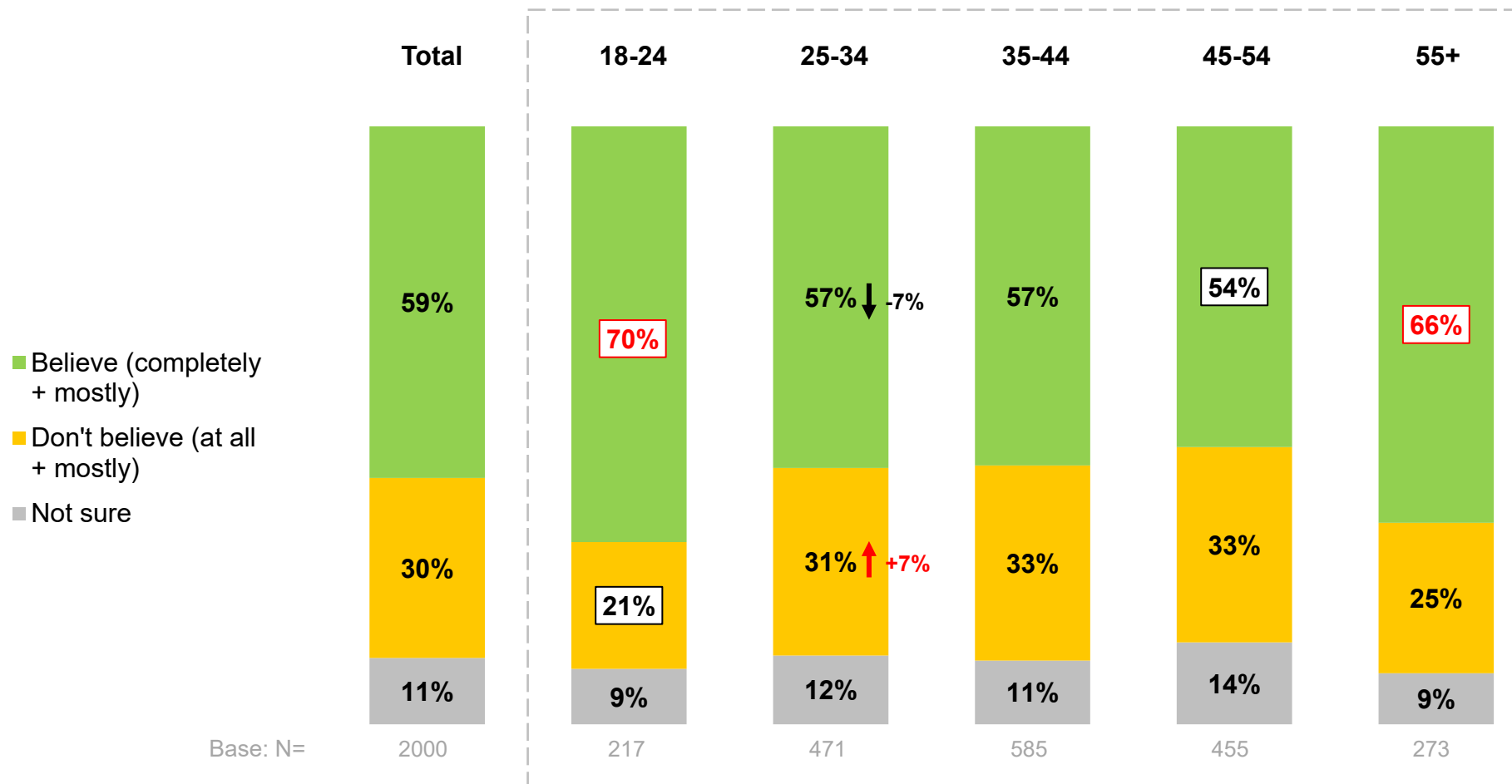
Do you believe that Ukraine will be able to build a strong economy?



 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 65 group, compared to the sample as a whole

UKRAINIANS'* BELIEF THAT...

the state will rebuild everything after the war / reimburse the costs
by age



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

Base: all respondents;

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

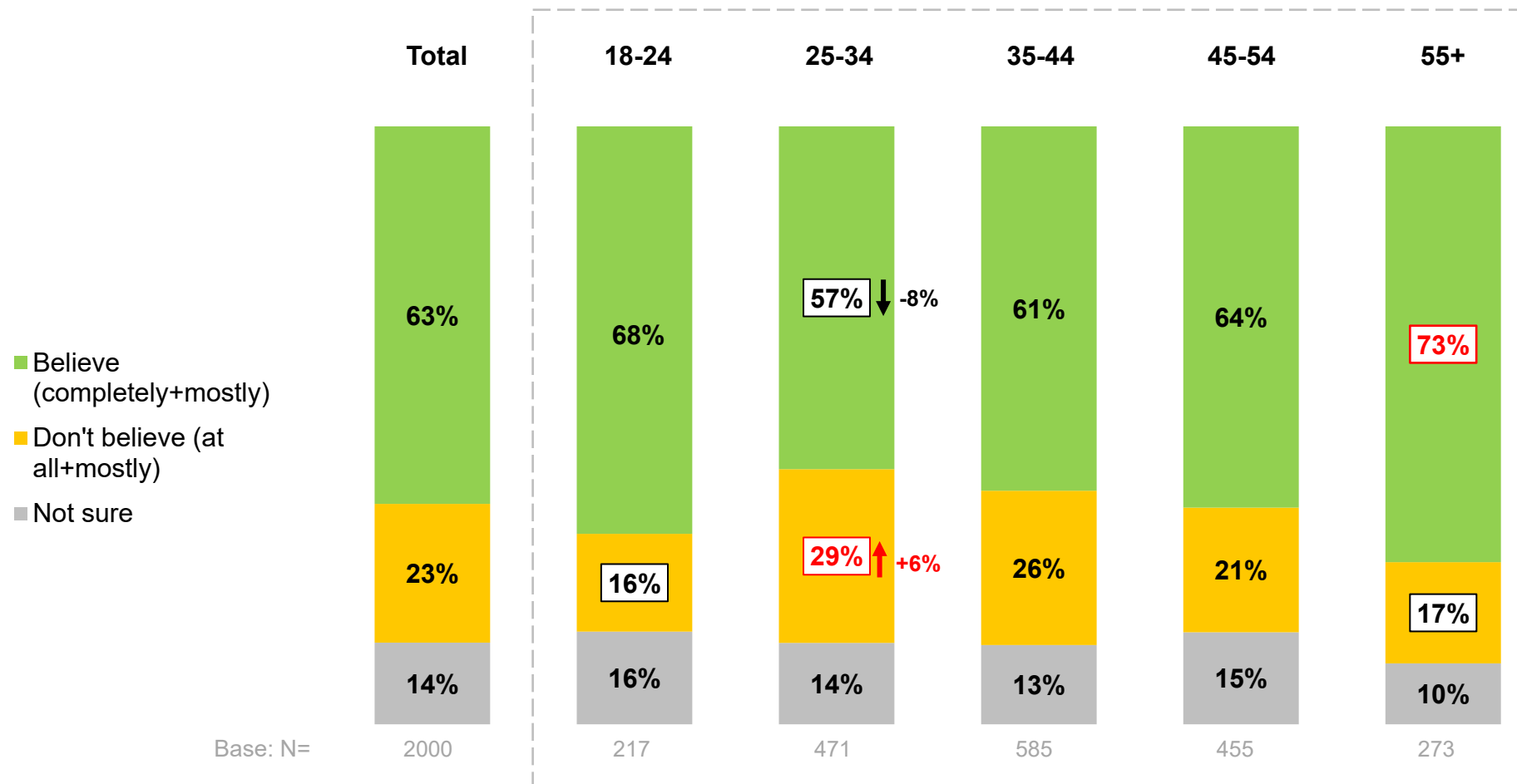
↓↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

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

UKRAINIANS'* BELIEF THAT...

Ukraine will soon become a member of the European Union (by 2030)*

by age



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

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

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

Base: all respondents

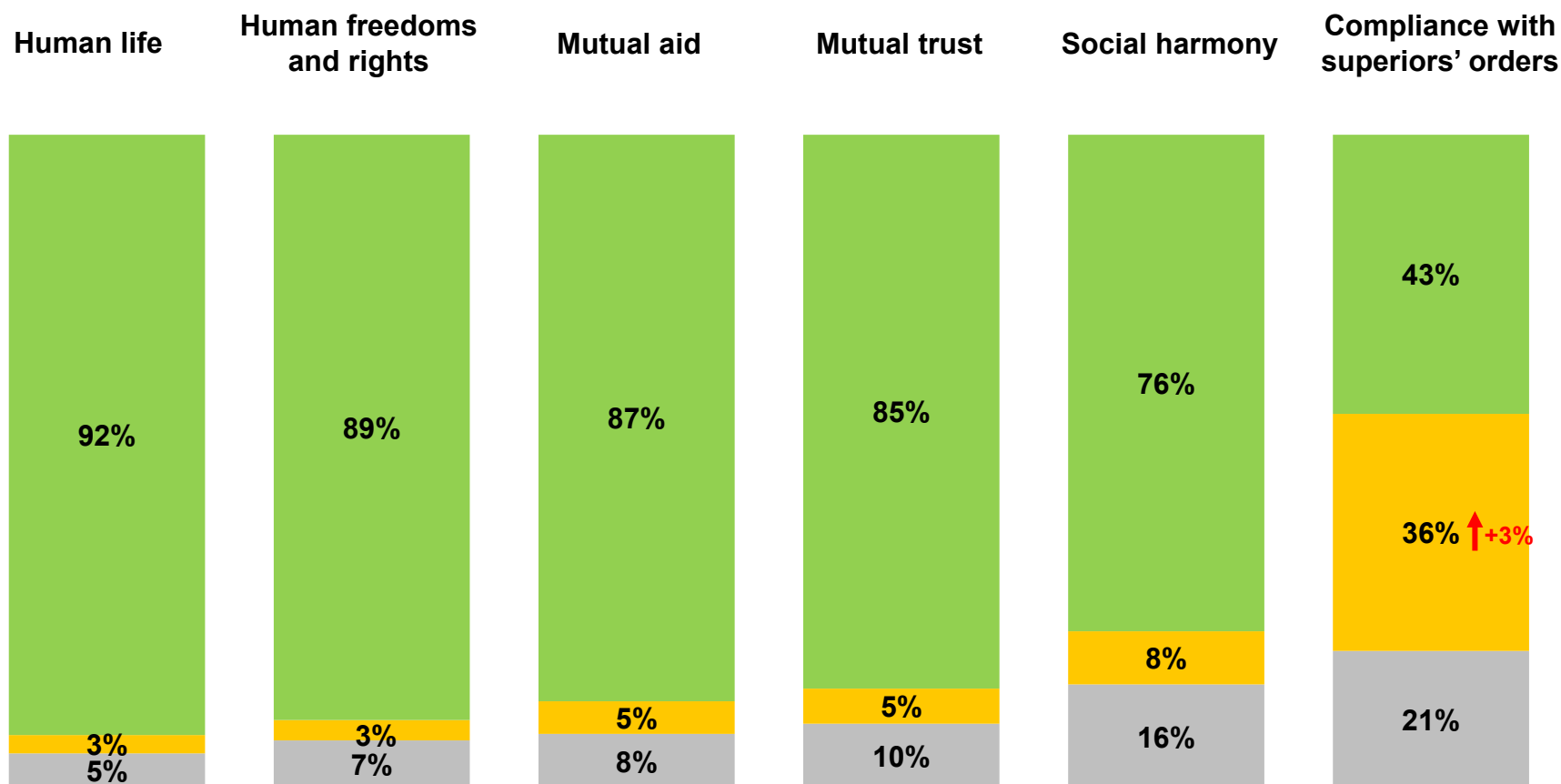
Do you believe that Ukraine will soon become a member of the European Union (by 2030)?

**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 – 92% supported this statement. More than 80% agreed with relevant statements about freedom and human rights, mutual aid and trust. 76% of respondents consider social harmony to be the greatest value. There was a slight increase in the percentage of those who *do not* consider compliance with superiors' orders to be the greatest value, but such respondents did not outnumber those who consider otherwise. This value remains the most controversial in perception.



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

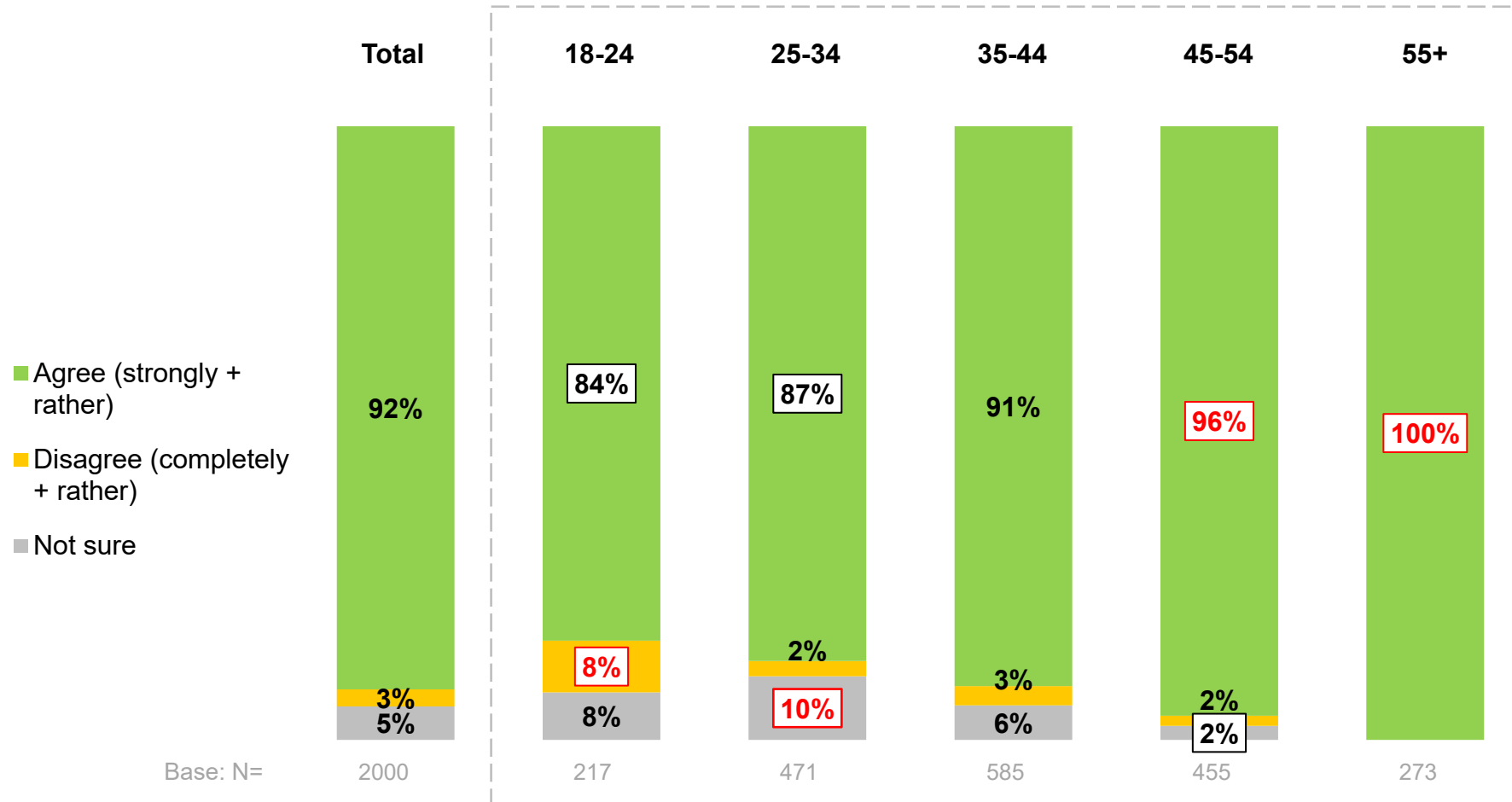
↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study

Base: all respondents, N=2000

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



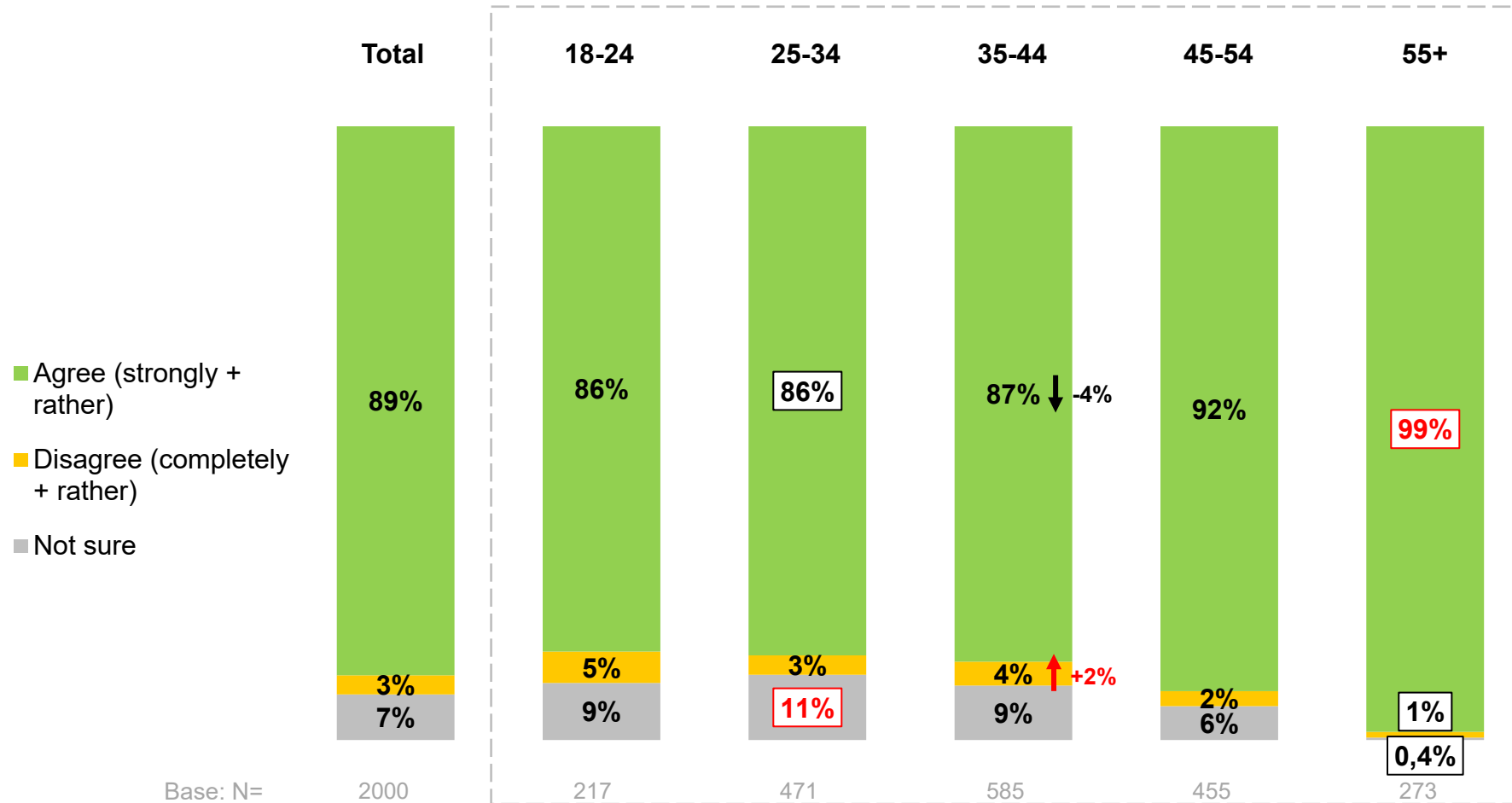
↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study

□ 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



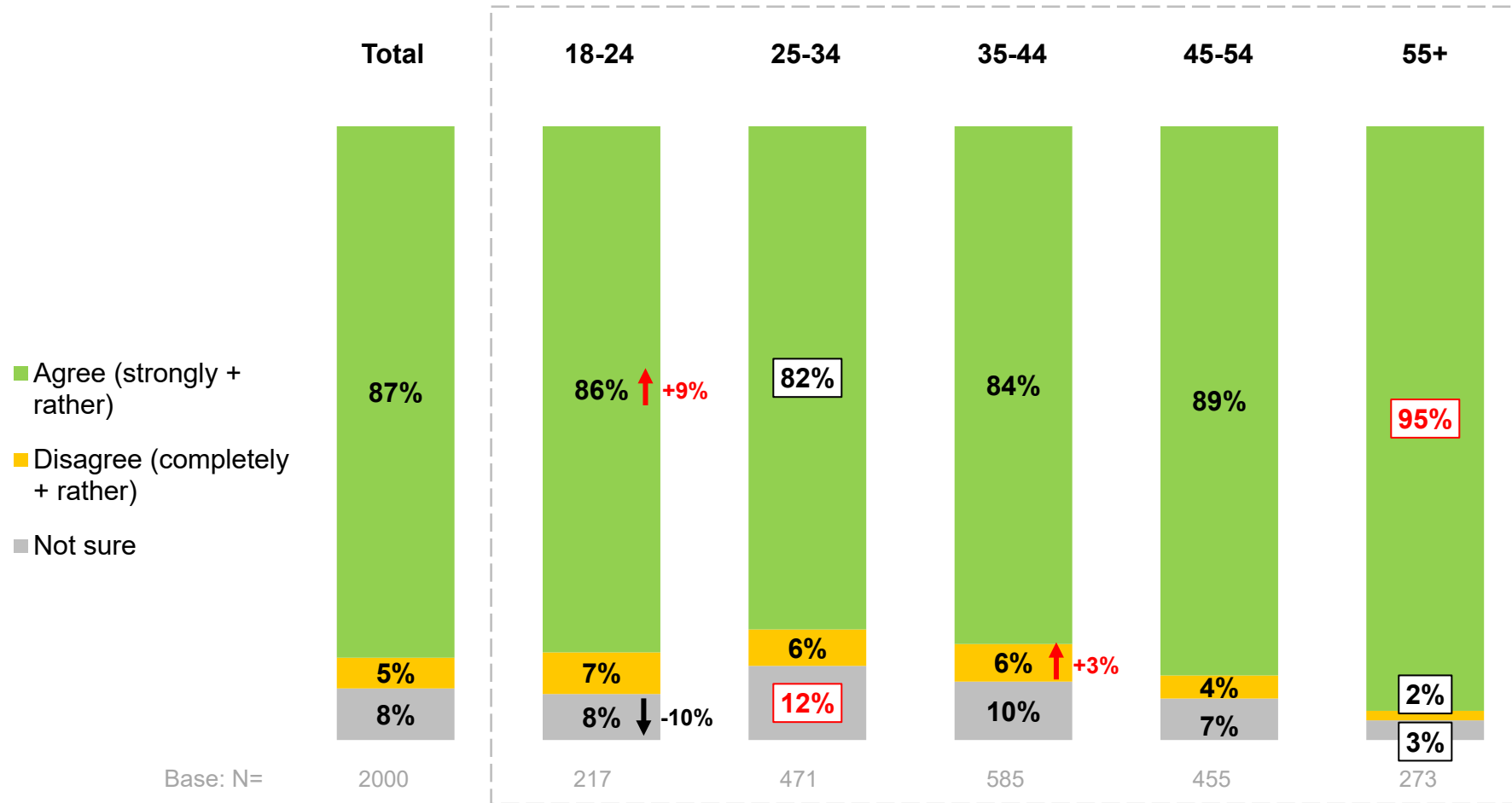
↓↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study

□ 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



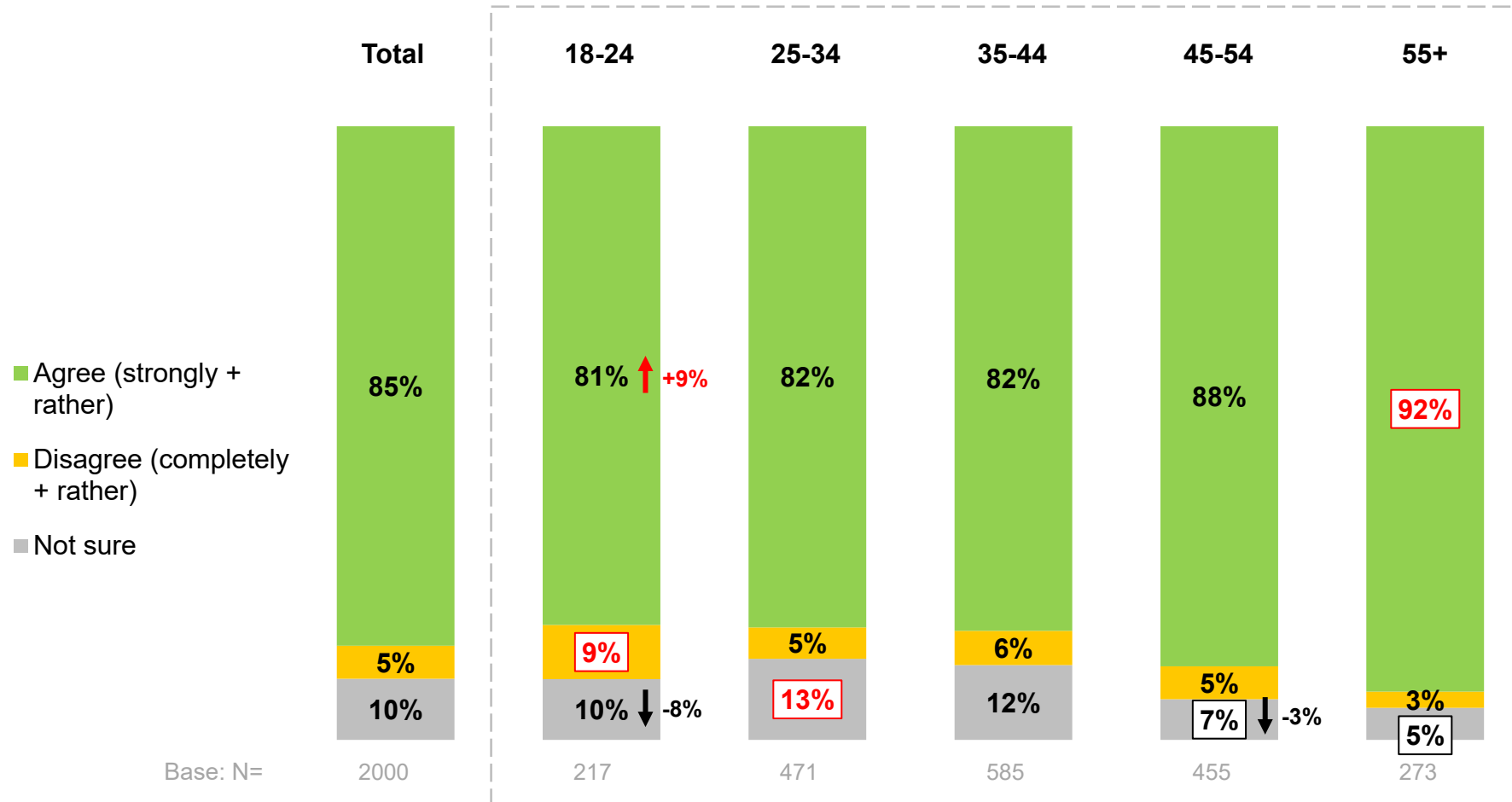
↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study

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

MUTUAL TRUST

is the greatest value

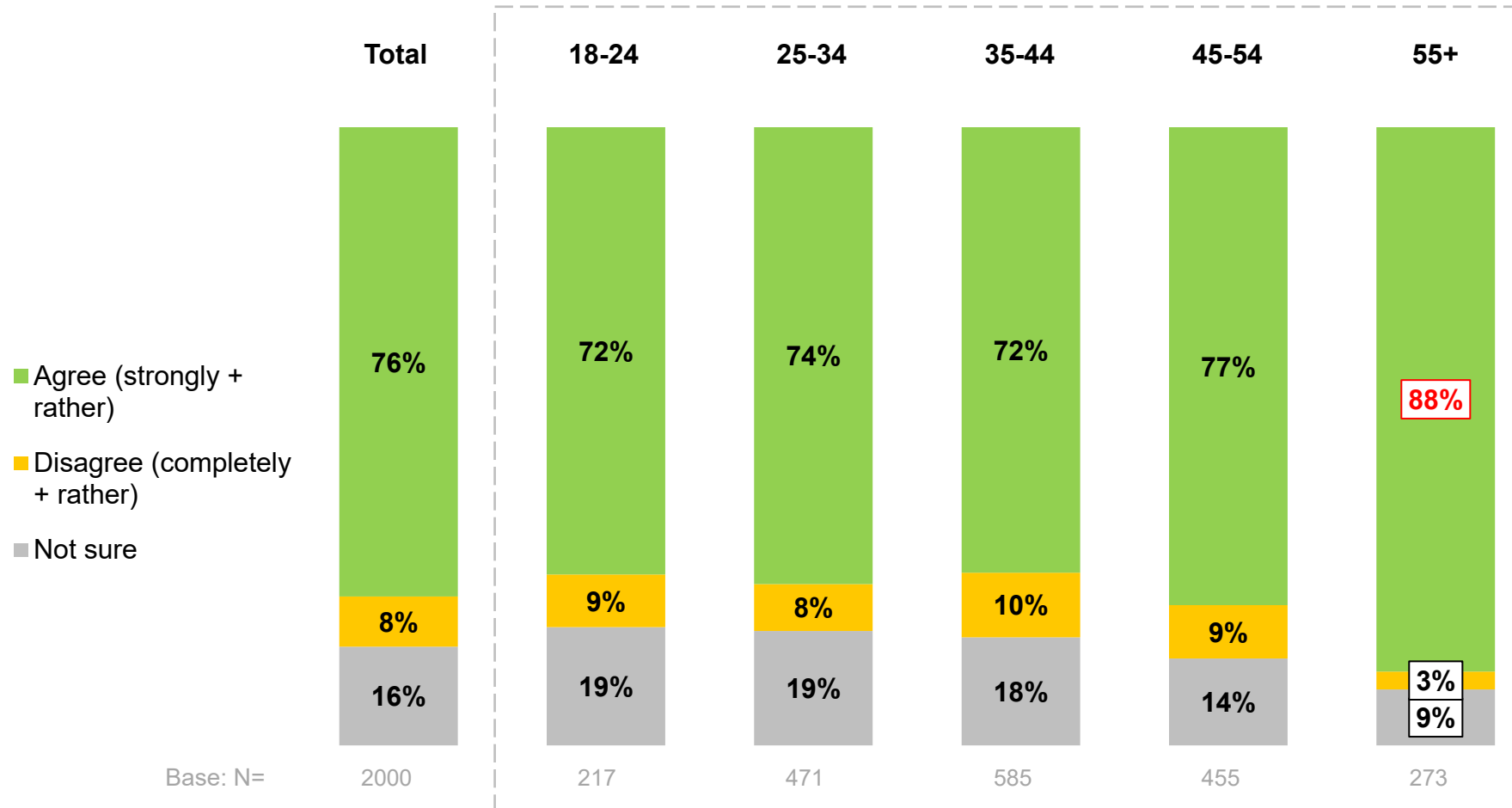
by age







↑↓ 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



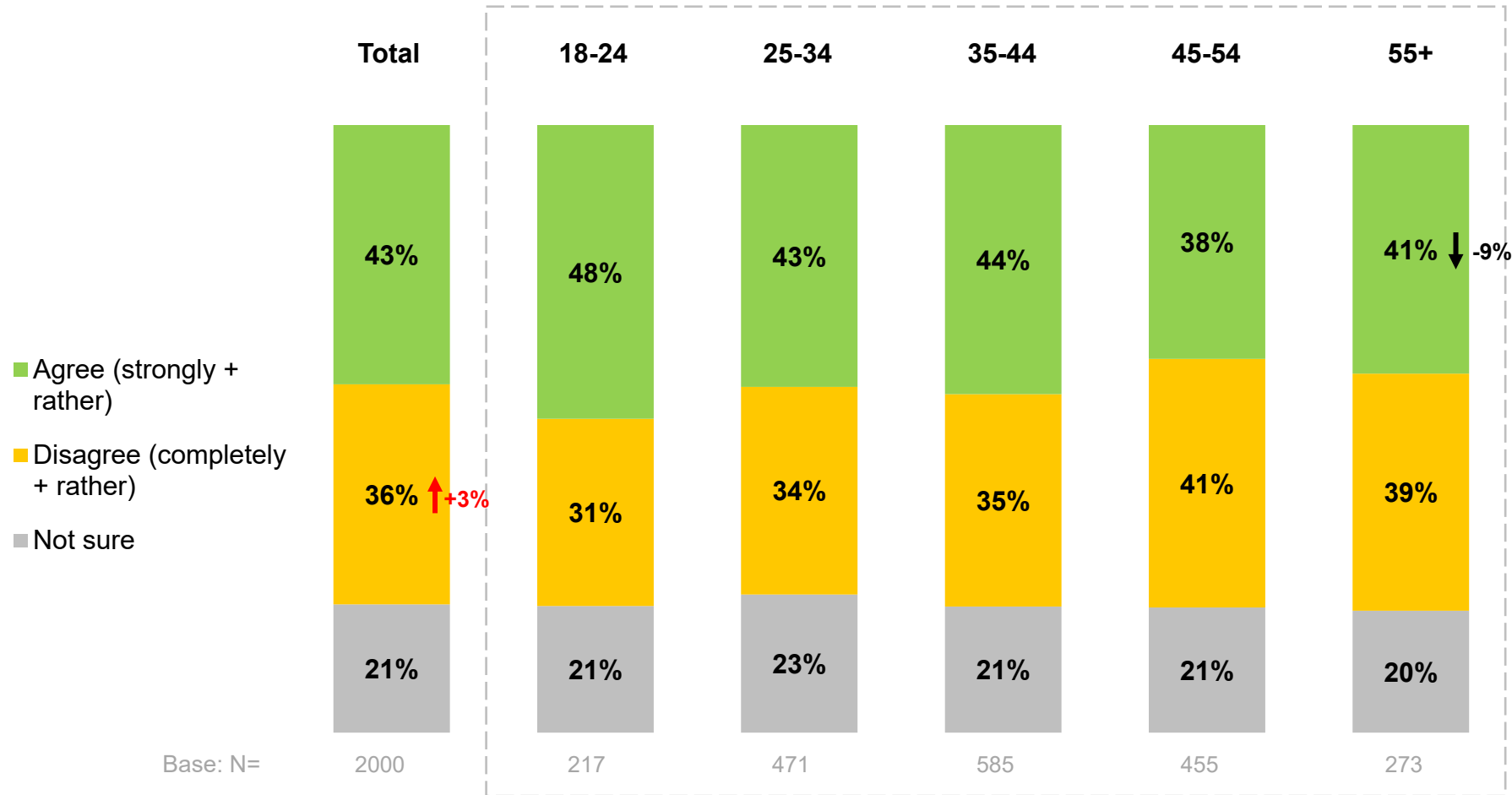


 Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study



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

COMPLIANCE WITH SUPERIORS' ORDERS

is the greatest value

by age

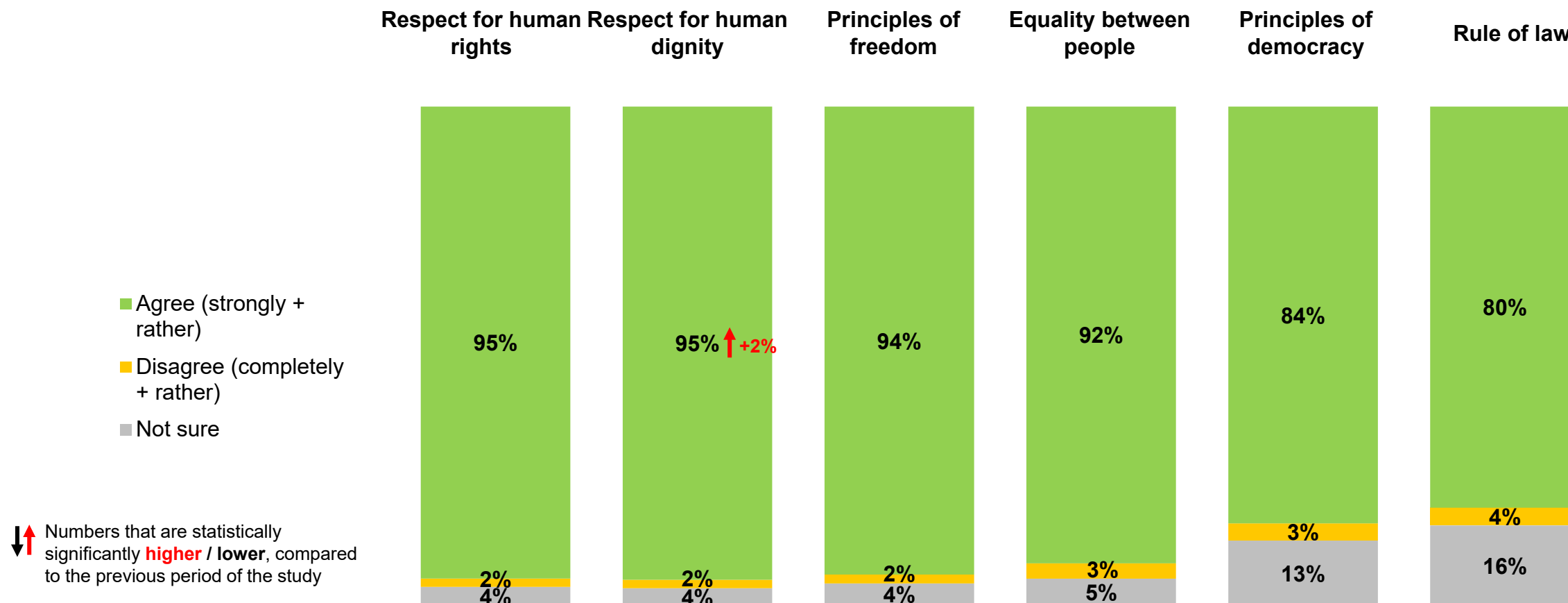


↓ ↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study

□ 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 80-95%; the most widely supported principles are respect for human rights and respect for human dignity, and the least supported is the rule of law. The share of those who agree with the importance of respect for human dignity increased significantly in the twelfth wave.



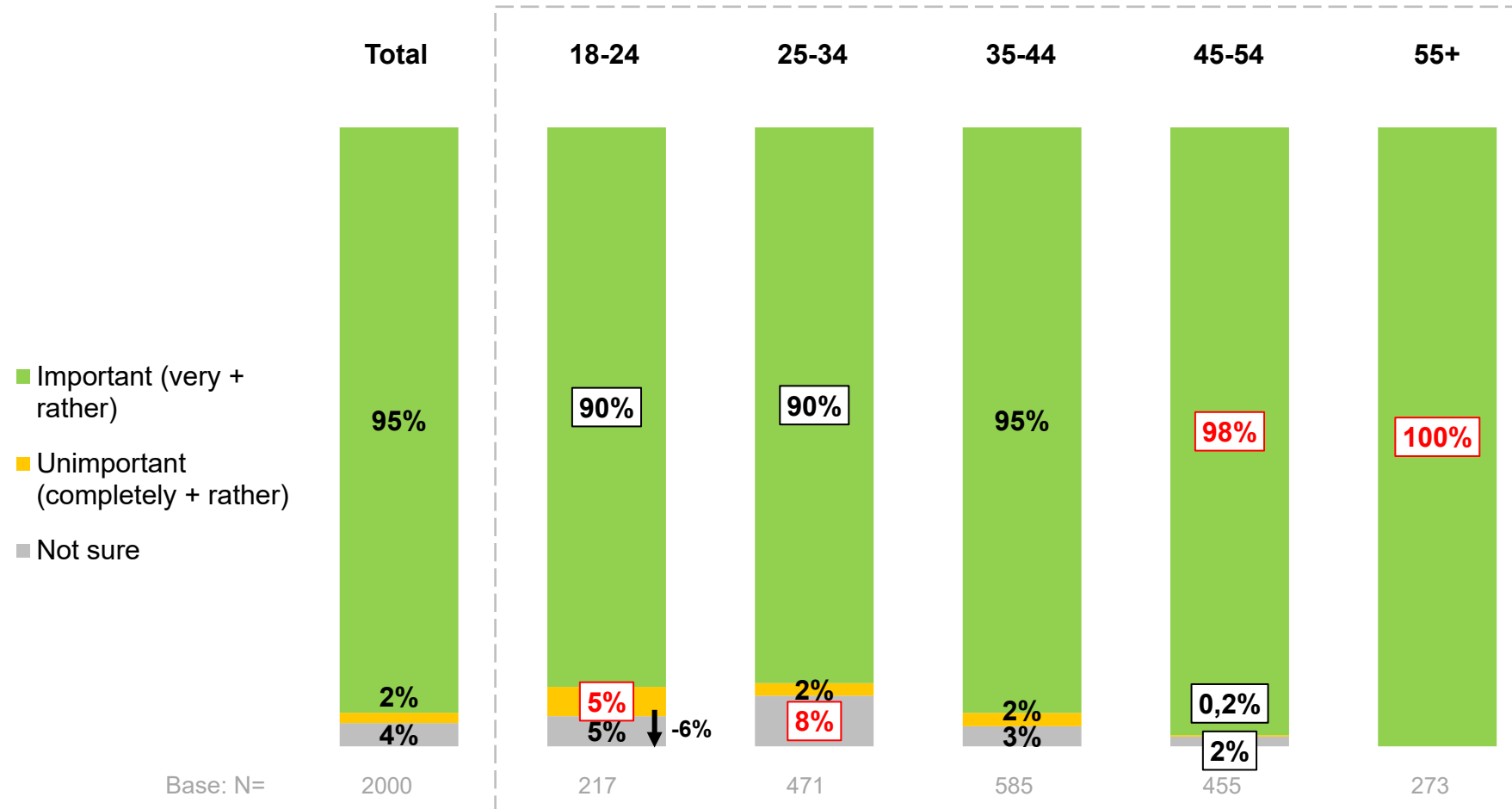
Base: all respondents, N=2000



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



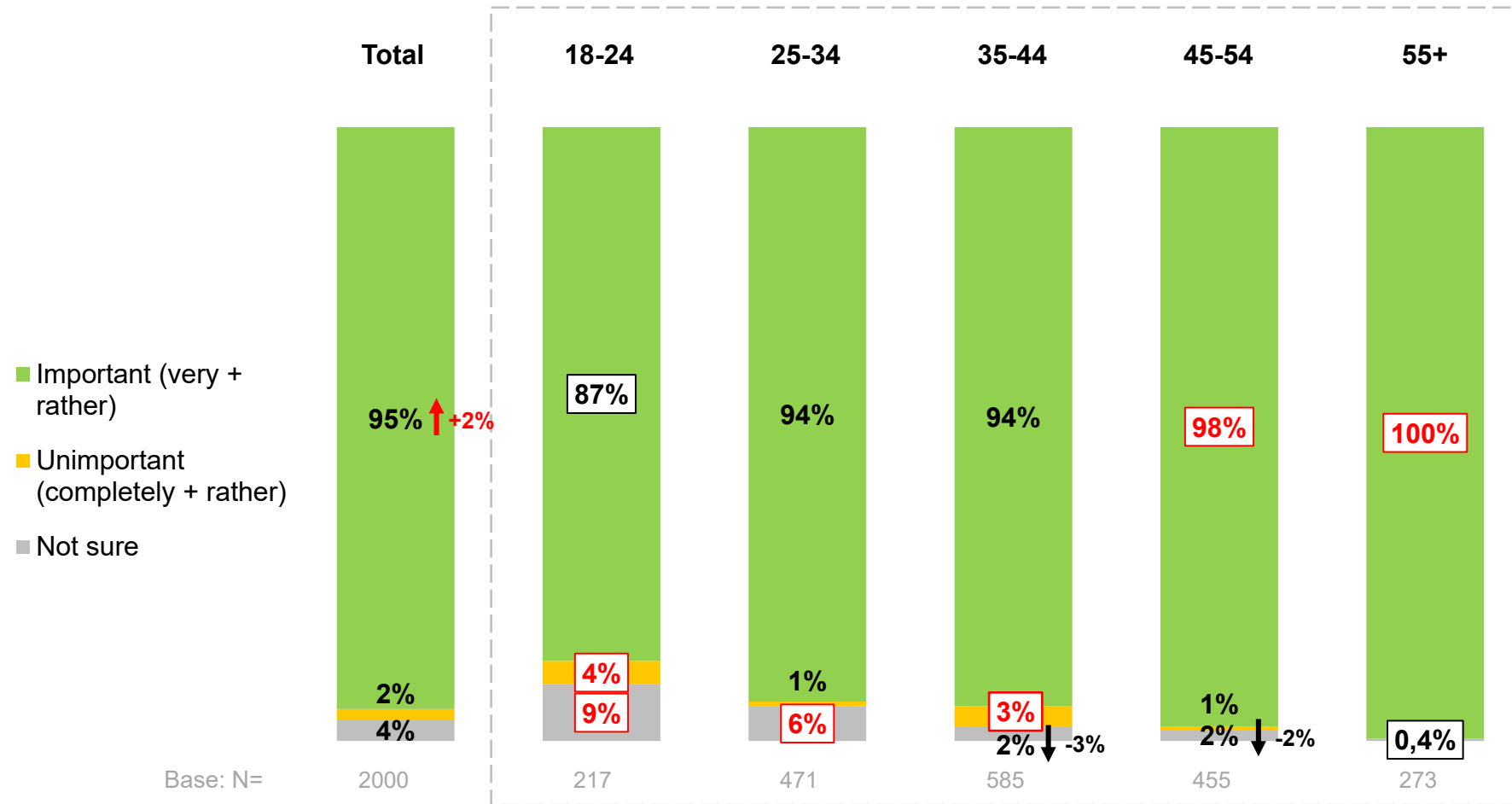


 Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study





 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



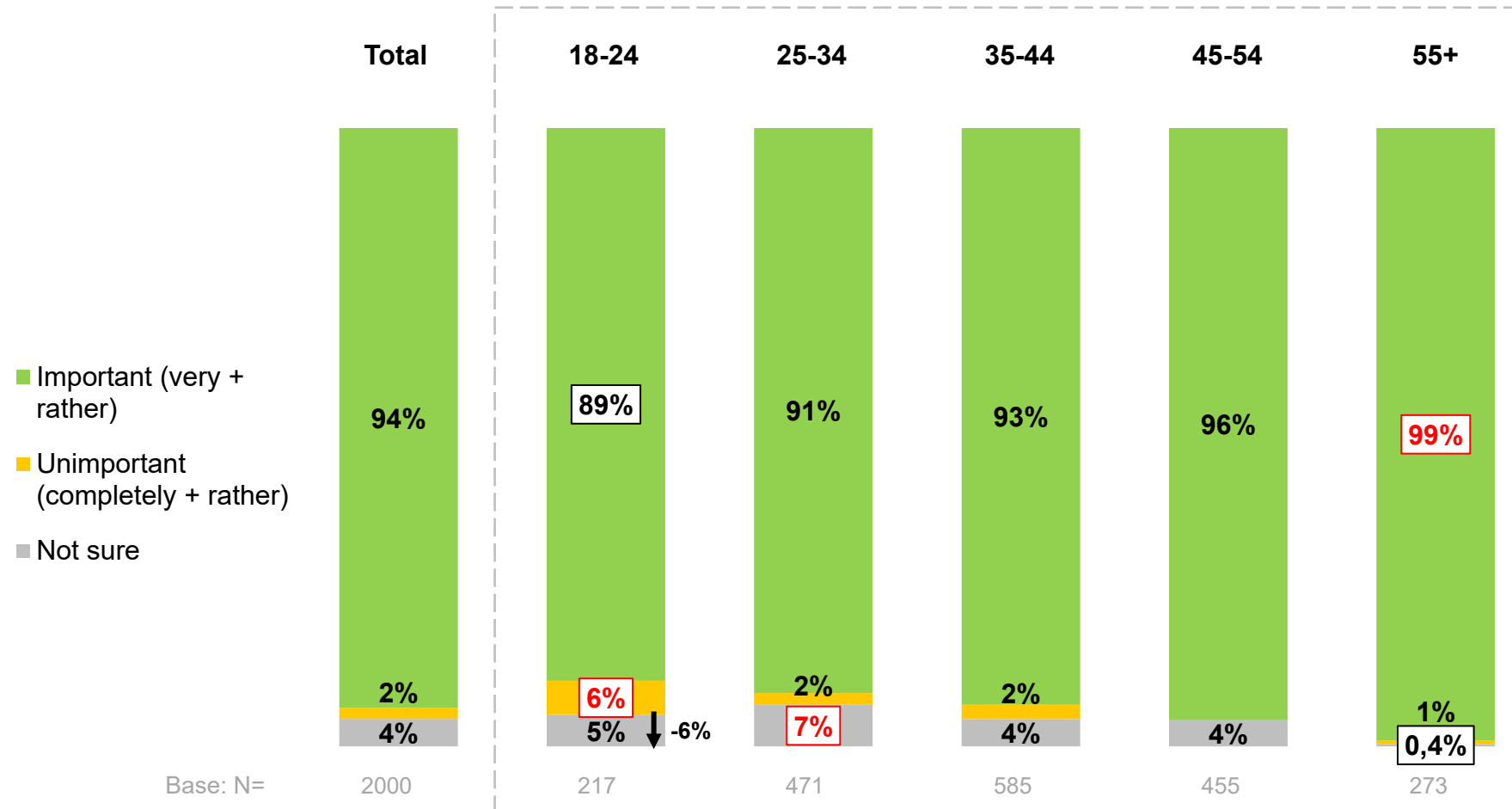


 Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study





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



THE IMPORTANCE OF OBSERVANCE

of principles of freedom

by age



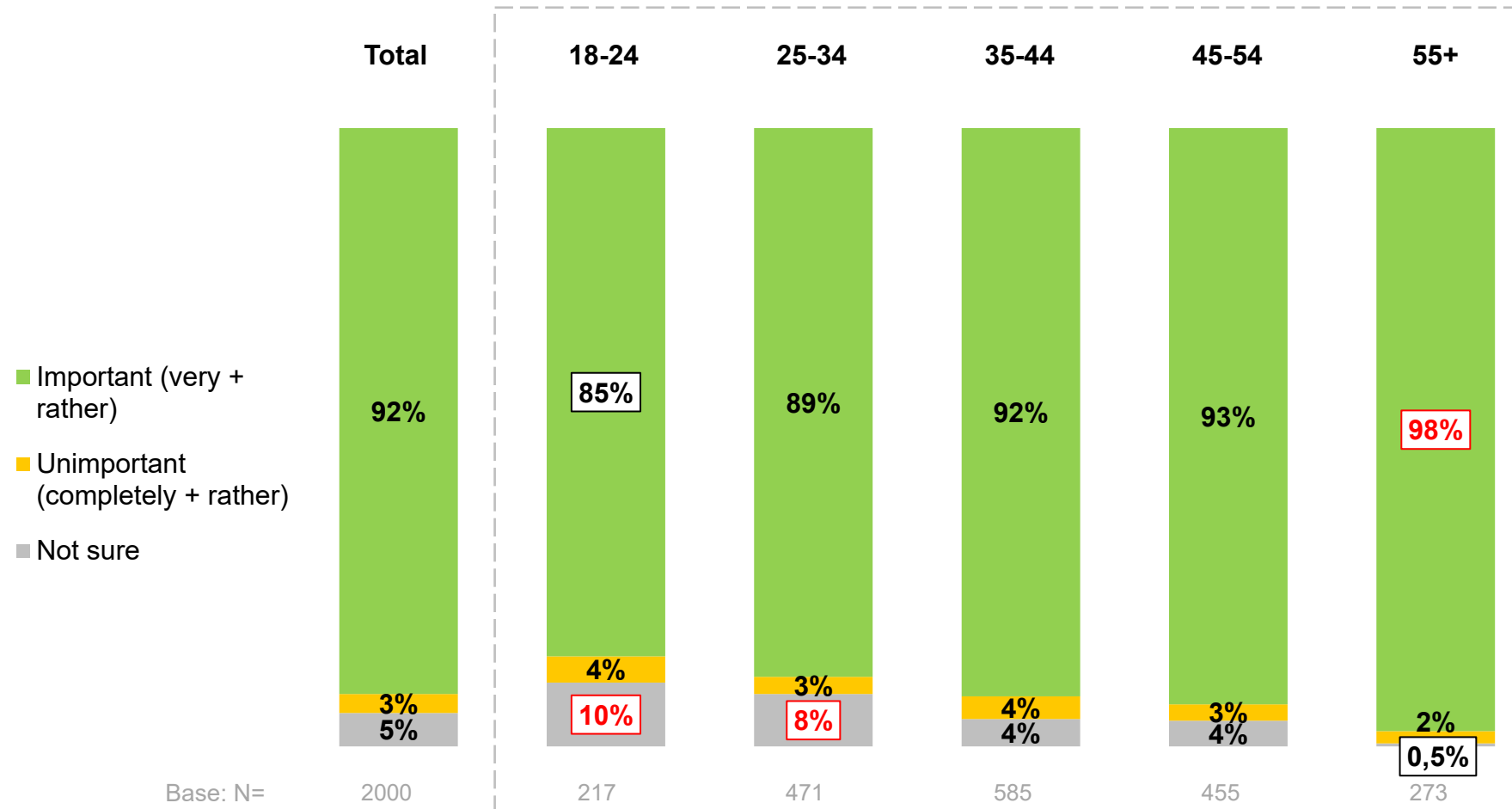


 Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study





 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



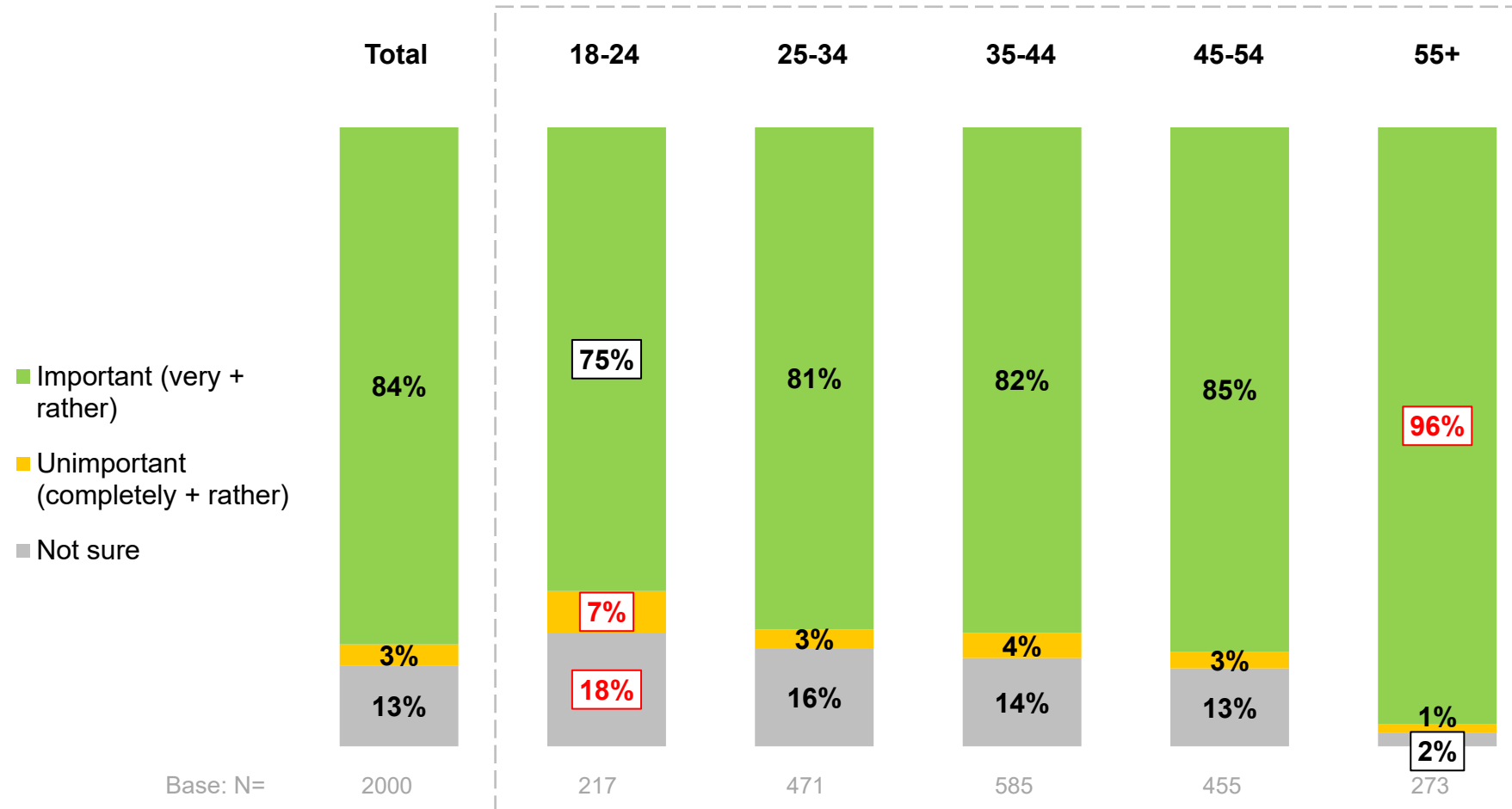


 Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study





 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

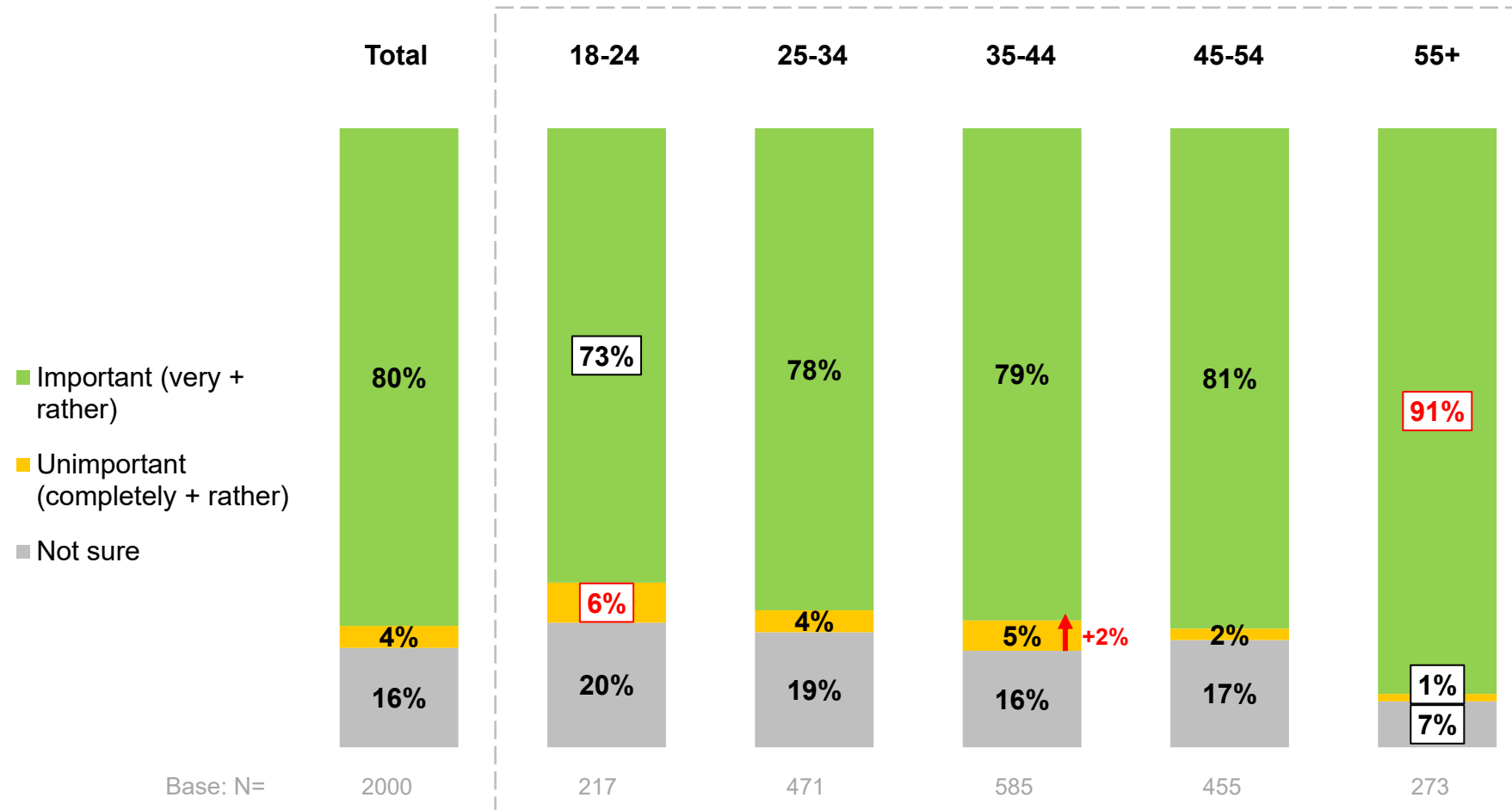




 Numbers that are statistically significantly **higher** / **lower**, compared to the previous period of the study



 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, 45% of respondents found it difficult to answer the question about fake news which they encountered in the past week, while 19% indicated that they had not encountered such news. Among misleading news, respondents most often mention news from Russian information sources (2%), from the front/about the war (2%), about Ukraine's intention to use the "Dirty Bomb" (2%), the offensive of the Armed Forces of Ukraine / the liberation of the occupied territories of Ukraine (2%), mining of the hydroelectric power plant in Kakhovka / possible undermining of the hydroelectric dam (2%).



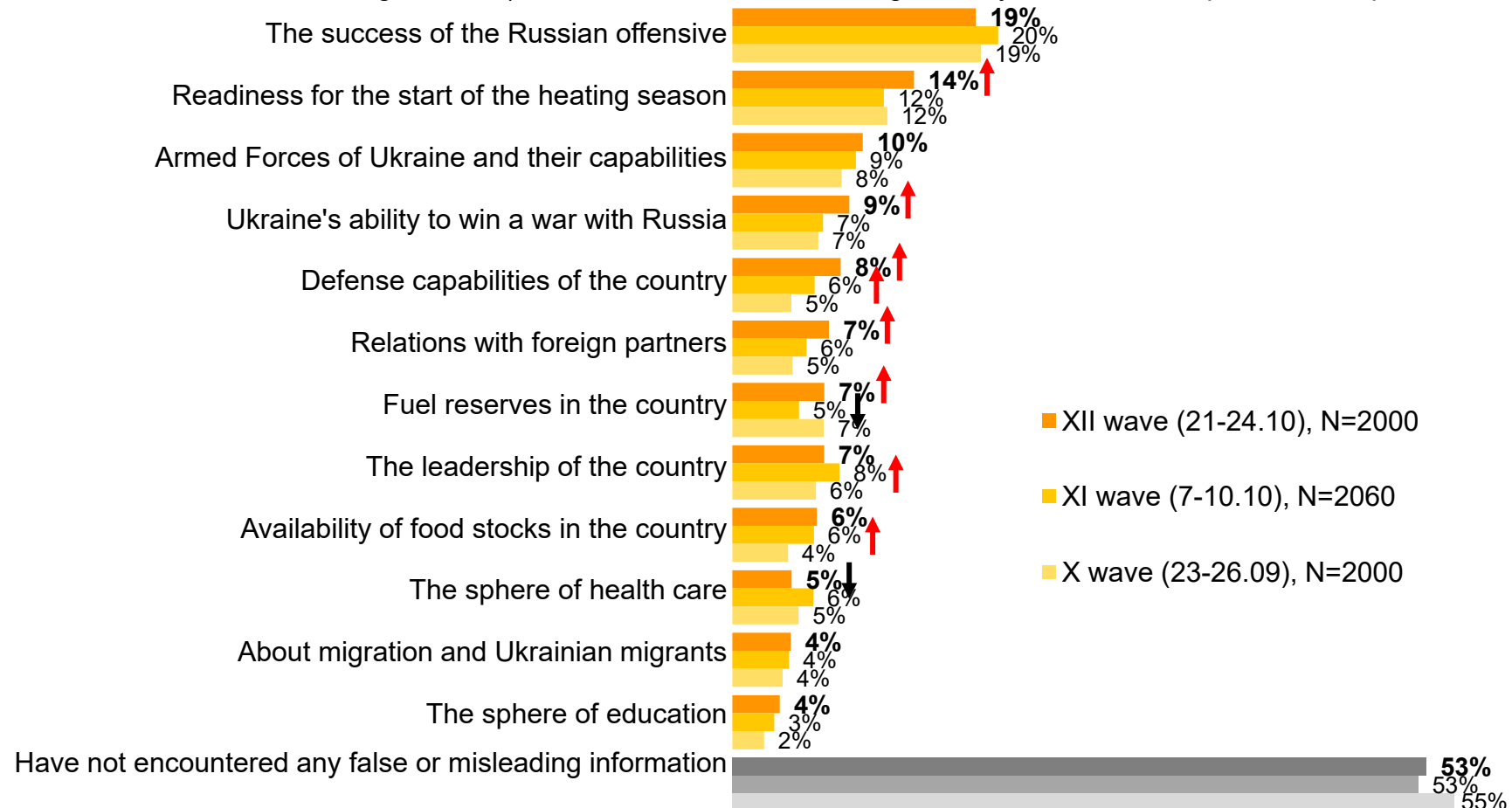
Base: all respondents, N=2000

Only the alternatives that have been spontaneously mentioned in >1% 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. According to their own assessment, the respondents most often encountered misleading news related to the success of the Russian offensive (19%) and readiness for the start of the heating season (14%, and this indicator has significantly increased compared to the previous wave).



Base: all respondents, N=2000

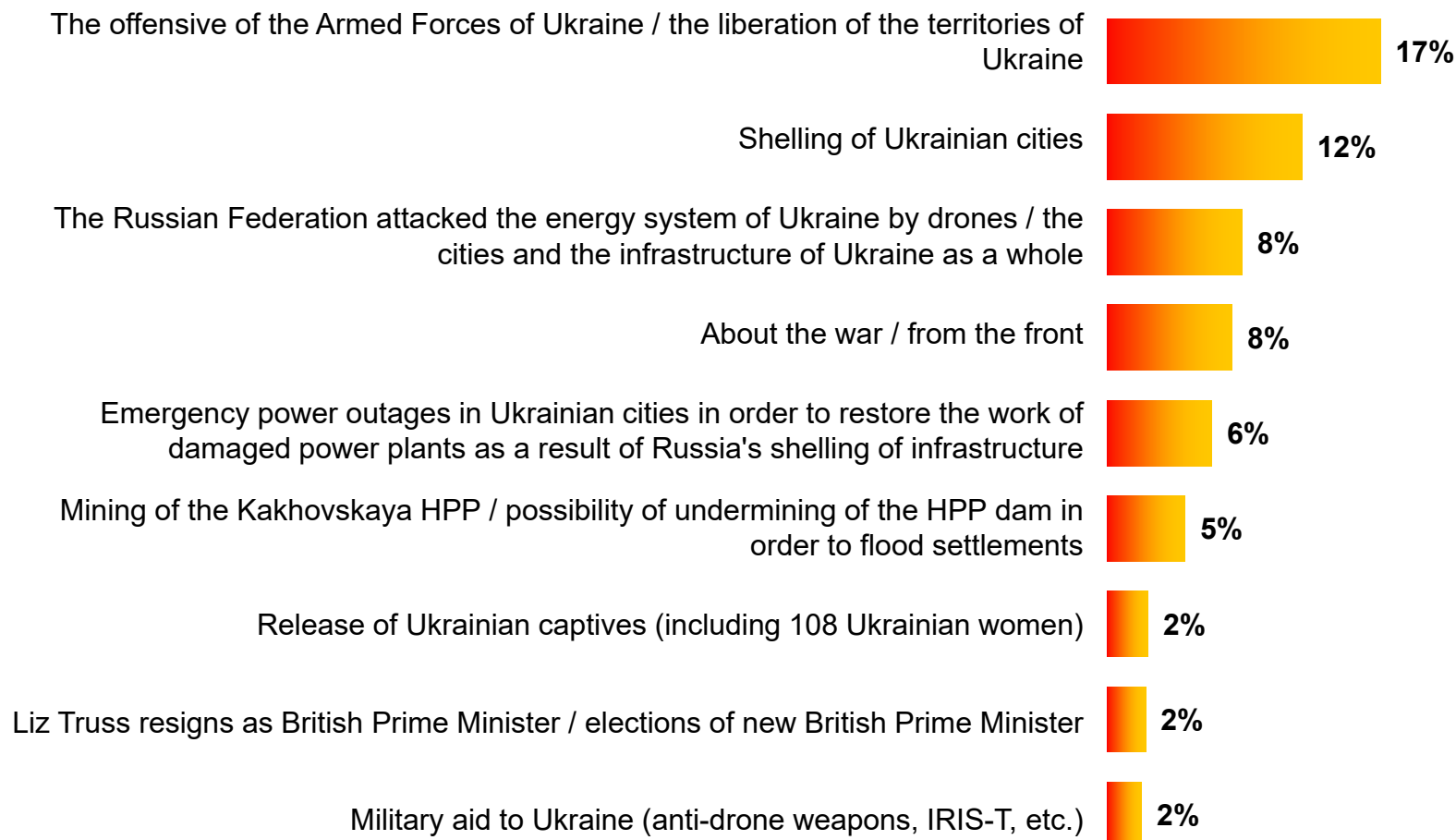
Have you encountered false or misleading information about any of these spheres in the past week? If so, what spheres did it concern?



 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 the most important is the offensive of the Armed Forces of Ukraine / the liberation of the territories of Ukraine (17%). Shelling of Ukrainian cities is another important event, which was mentioned by more than every tenth respondent.



Base: all respondents, N=2000

Only the alternatives that have been mentioned in >2% 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

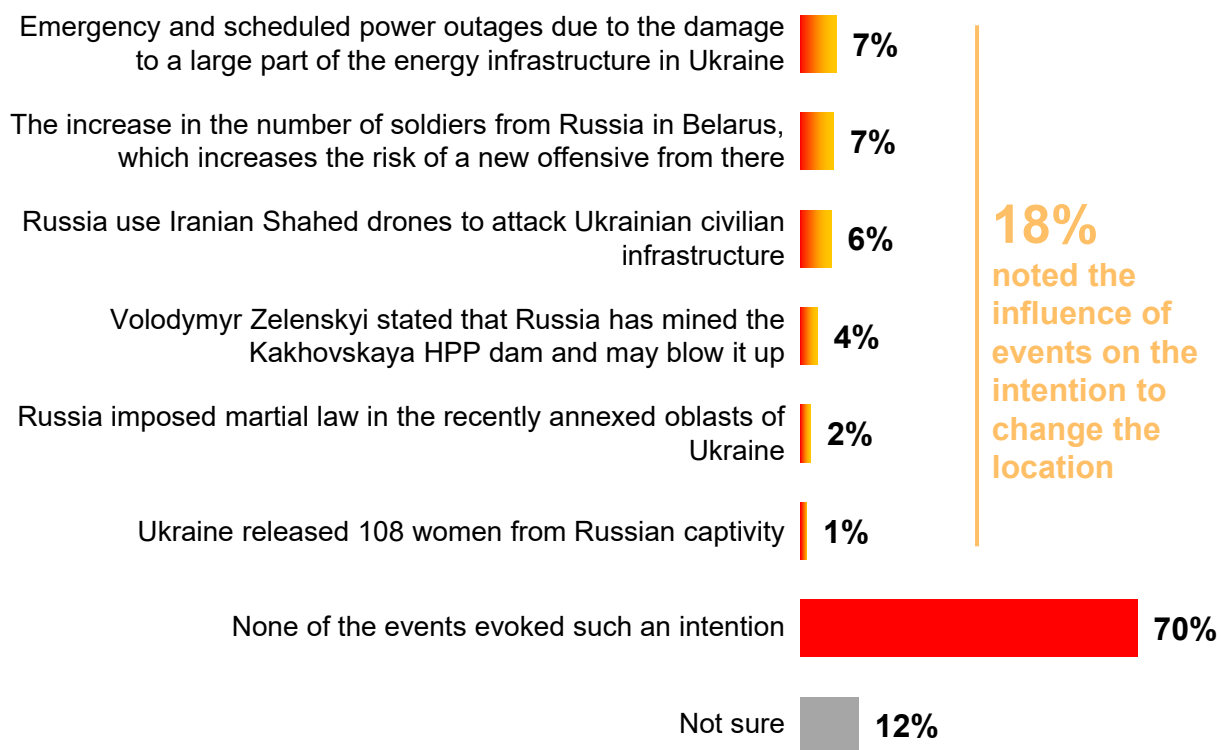
The largest shares of the audience are aware of emergency and scheduled power outages due to the damage to a large part of Ukraine's energy infrastructure (74%), and Russia's use of Iranian Shahed drones to attack Ukraine's civilian infrastructure (72%). The least, respondents are aware of the increase in the number of Russian soldiers on the territory of Belarus, which increases the risk of a new offensive from there (60%), and of Volodymyr Zelenskyi's statement regarding Russia's mining of the Kakhovskaya HPP dam with the possibility of its undermining (60%).



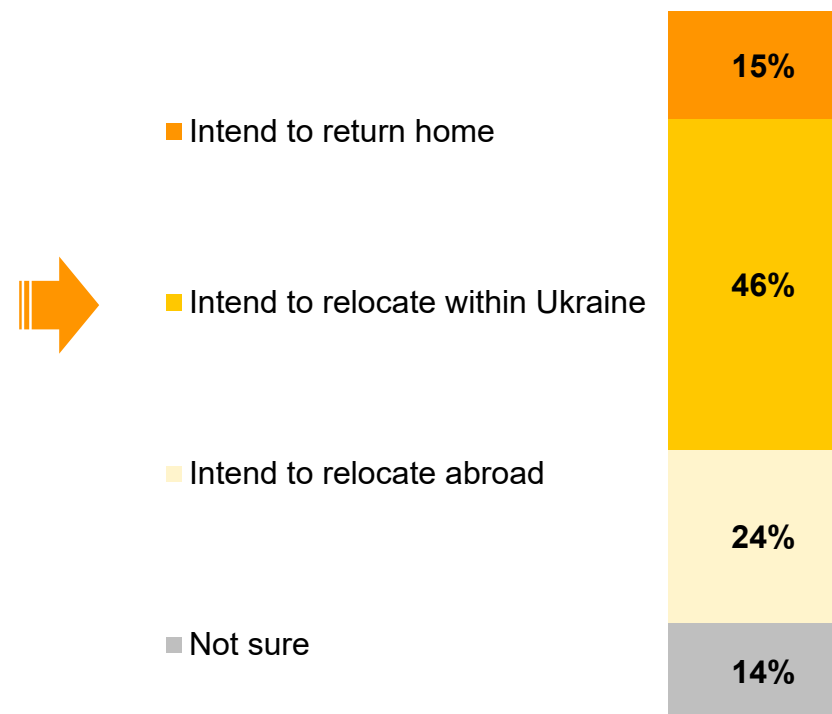
THE EFFECT ON RELOCATION PLANS AND DIRECTION OF PLANNED RELOCATION

For the majority of respondents (70%), there were no events that influenced their migration intentions. At the same time, 18% indicated that at least one event influenced their intention to relocate: 46% indicated that they intend to migrate within Ukraine, 24% - to relocate abroad, and 15% - to return to their permanent place of residence.

The effect of the events on plans regarding relocation



Direction of relocation



Base: those who stayed in Ukraine and have heard about the aforementioned events, N = 1835

Base: respondents who want to relocate because of these events, N = 330

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

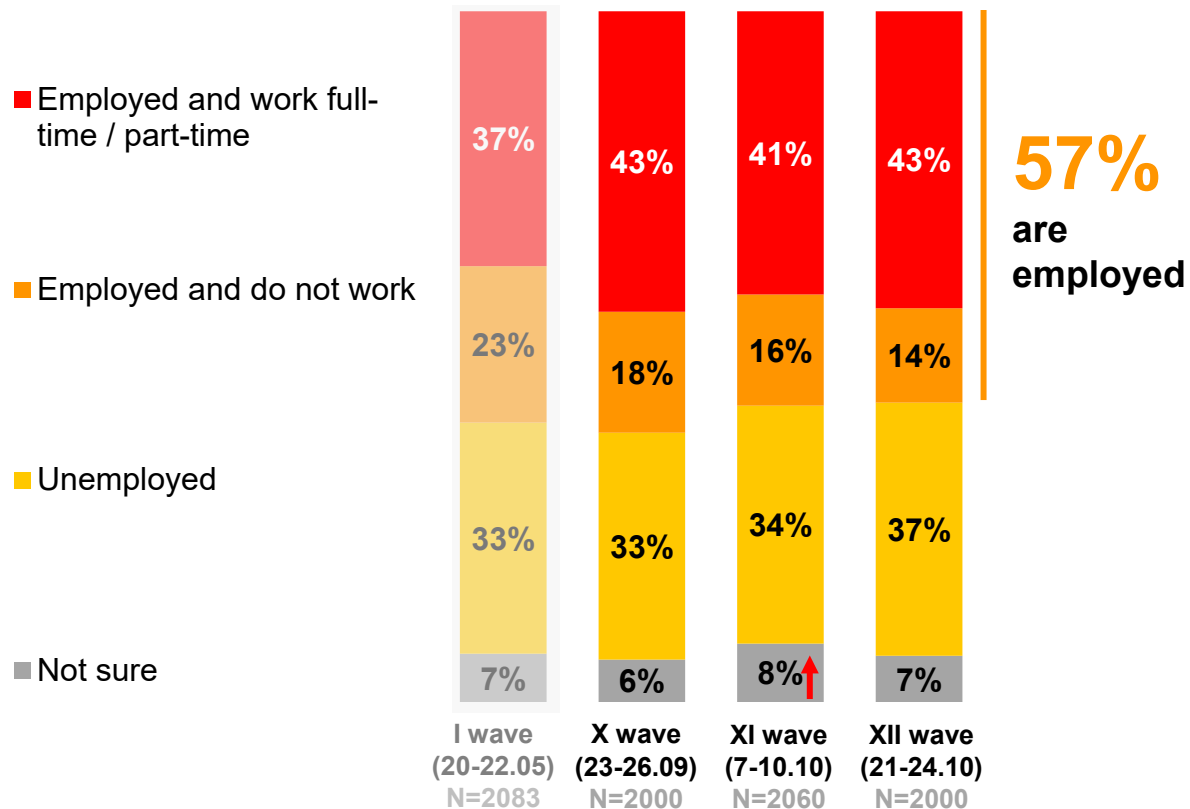
EMPLOYMENT DURING THE WAR



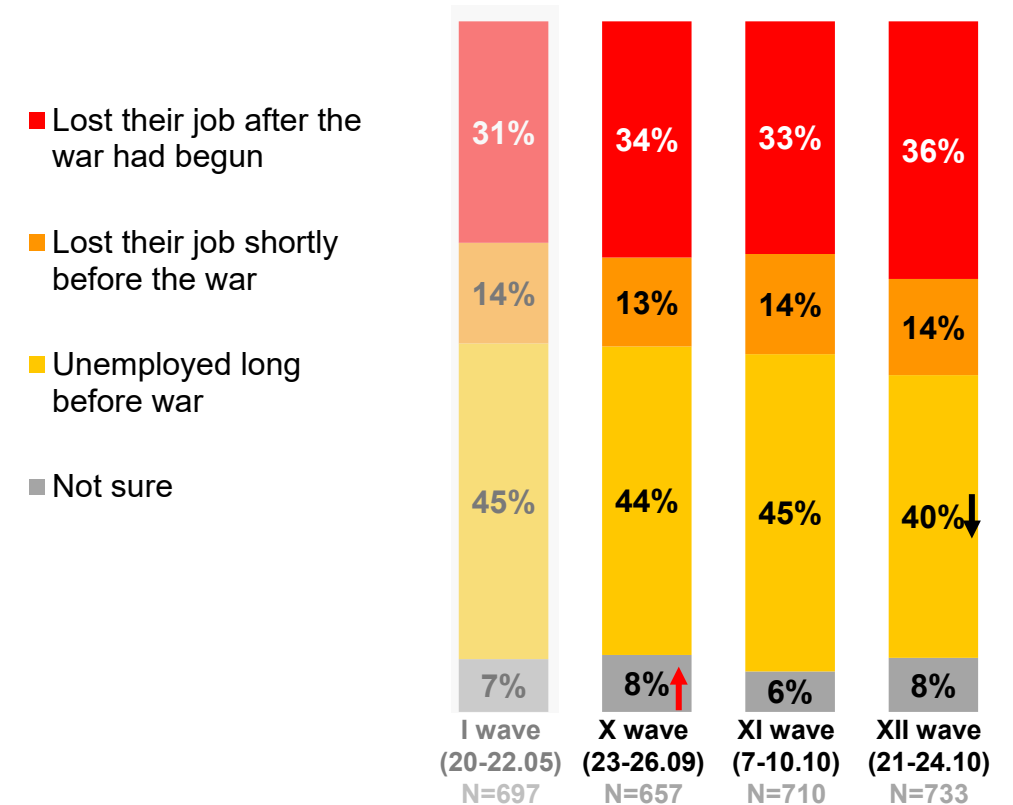
EMPLOYMENT DURING THE WAR

In the twelfth wave, there were no changes regarding the work status of Ukrainians* – 57% continue to have a job; 43% of respondents work full-time / part-time, and 14% of respondents are employed but not working. At the same time, 37% of Ukrainians* are unemployed - among them, 36% have lost their jobs since the beginning of the war and 40% were unemployed long before the invasion (the indicator has decreased by 5 percentage points compared to the previous wave due to an increase in the share of those who have lost their jobs since the beginning of the war, and those who could not answer).

Employment:



Unemployment specifics:




Base: all respondents

Base: unemployed respondents

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

Are you currently employed?

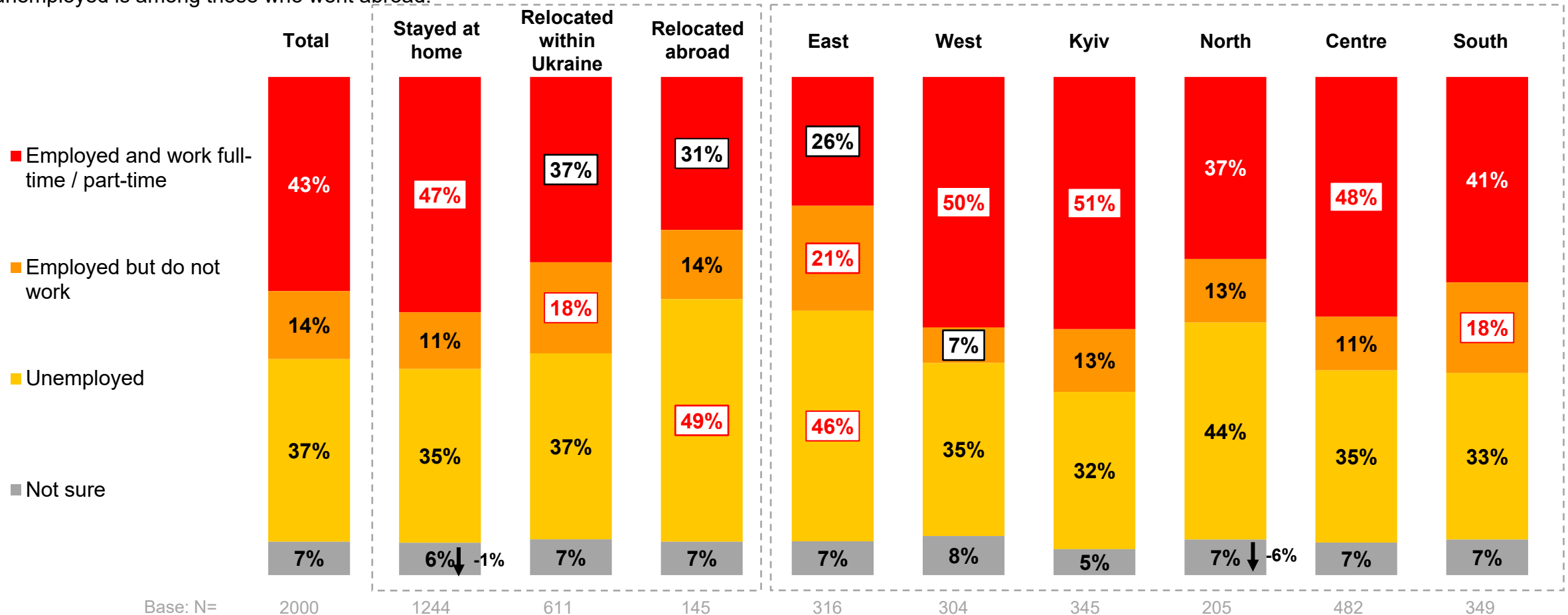
Which of the following phrases best describes your situation:

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

EMPLOYMENT DURING THE WAR

by migration status and region

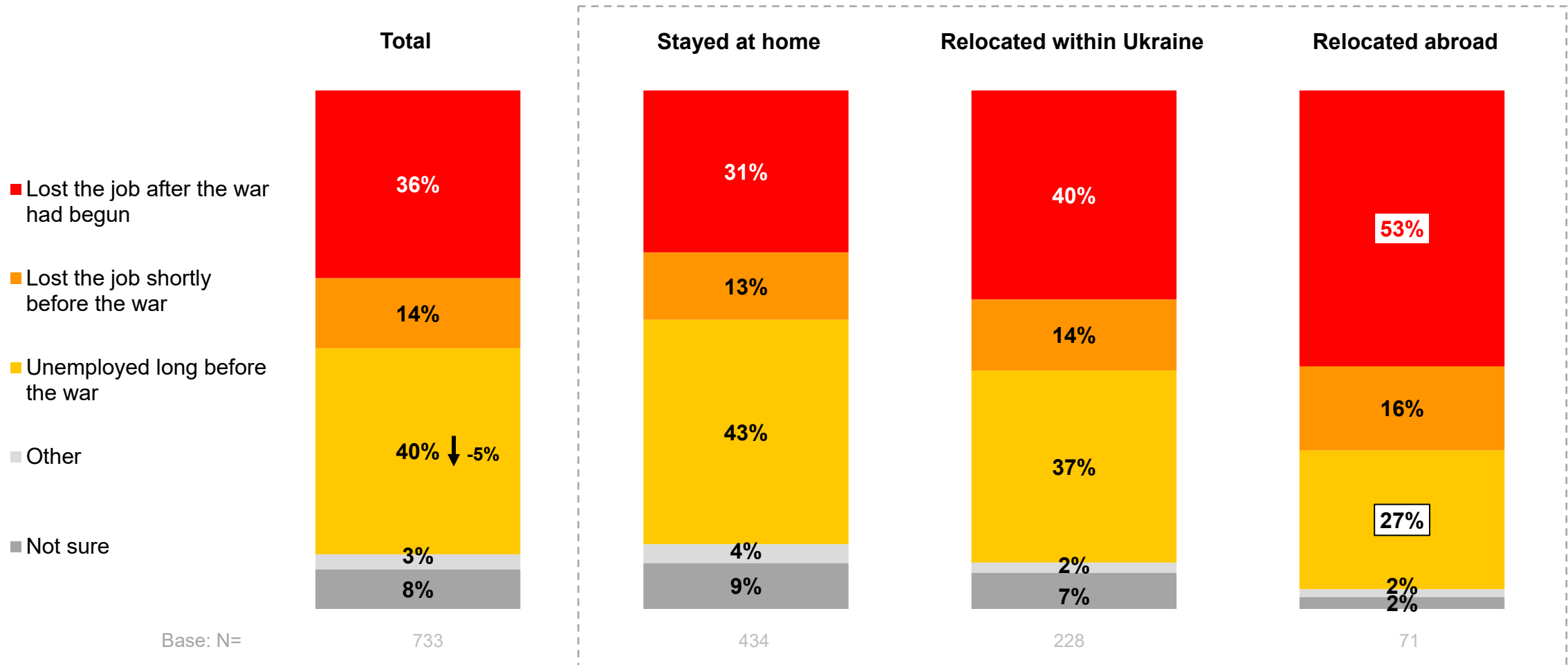
There were no recorded significant differences among migration and regional groups compared to the previous wave. Among those who stayed at home, as well as among the residents of the Western, Central regions and Kyiv, there is a significantly higher share of those who have a job and are actively working. At the same time, among the people from the East and the South, there is a significantly higher share of those who are employed but temporarily do not work. The largest share of the unemployed is among those who went abroad.





UNEMPLOYMENT SPECIFICS

by migration status

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



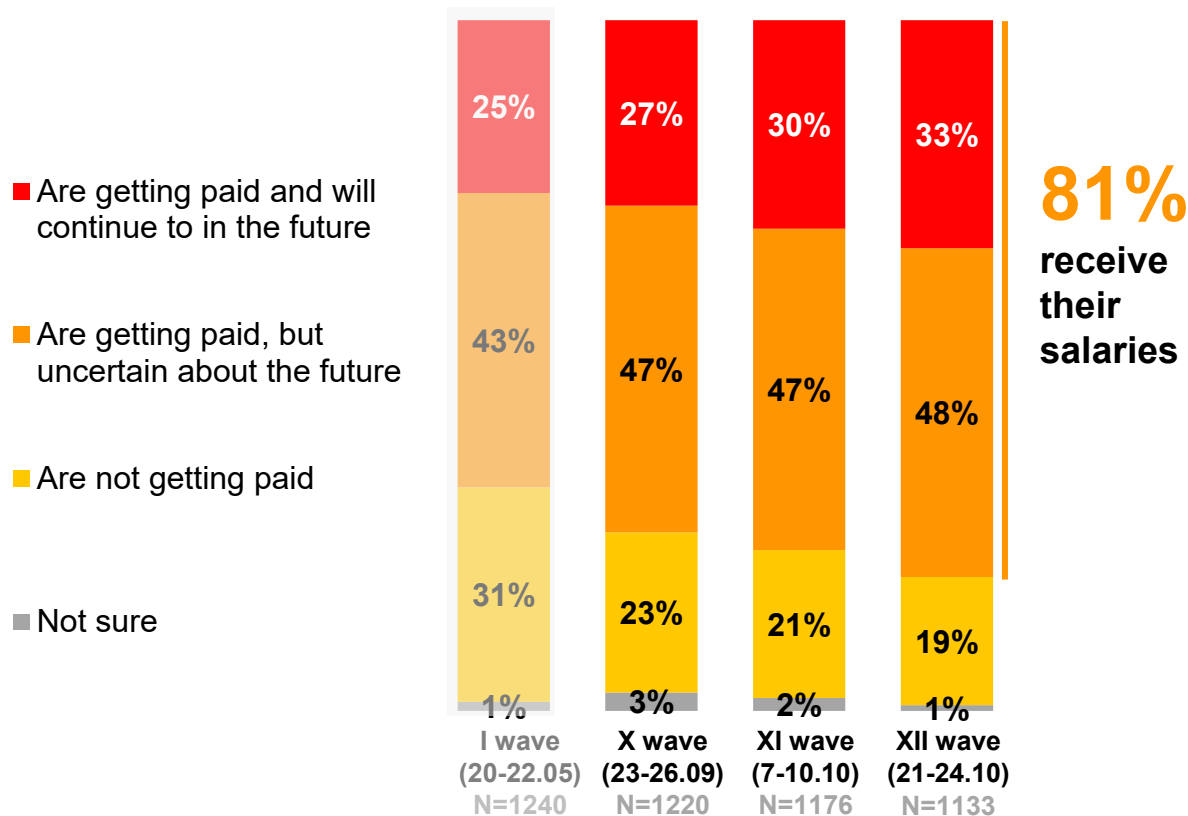
 Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole
  Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

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

INCOME DURING THE WAR

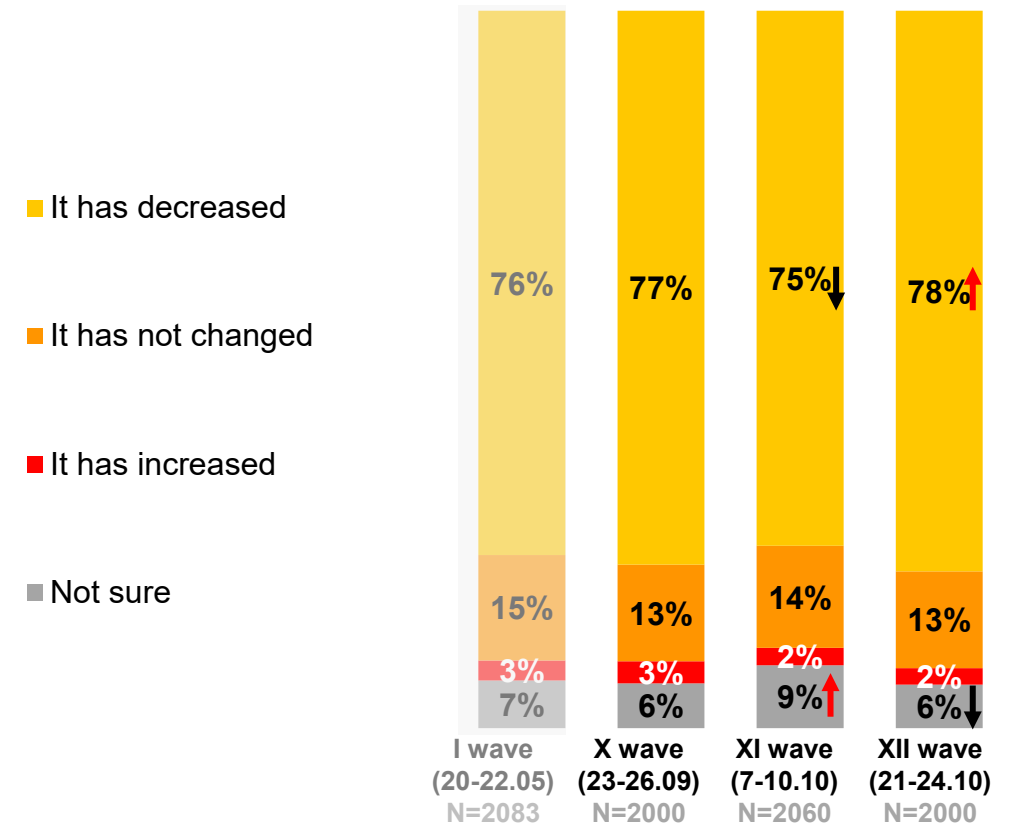
The share of respondents reporting a decrease in income since the beginning of a full-scale invasion has increased significantly compared to the previous wave and is at 78%. In contrast, only 2% indicate that their income has increased. The percentage of those who find it difficult to assess the dynamics decreased slightly in the twelfth wave. The percentage of the employed population who receiving a salary has increased - it is 81%; at the same time, almost half (48%) 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

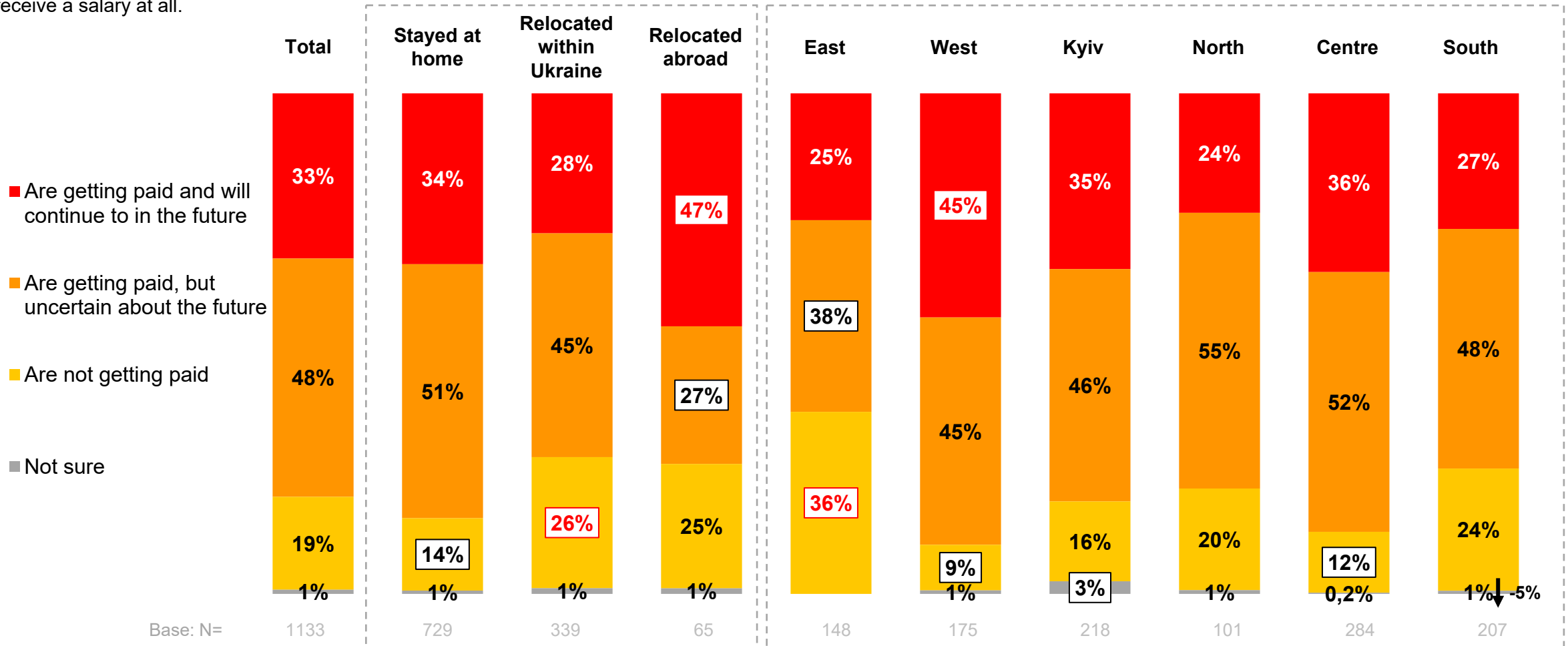
Do you receive salary?
How has your income changed since the full-scale war had begun?

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



INCOME DURING THE WAR



by migration status and region

There are no significant differences among migration and regional groups compared to the previous wave. A significantly higher share of those who have confidence in receiving a salary in the future is recorded among residents of the West and those who went abroad. Among those who stayed at home, as well as among residents of the North and the Centre, more than half of the respondents are not confident of the stability of their income. Whereas among residents of the East, there is recorded the highest share of those who do not receive a salary at all.



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

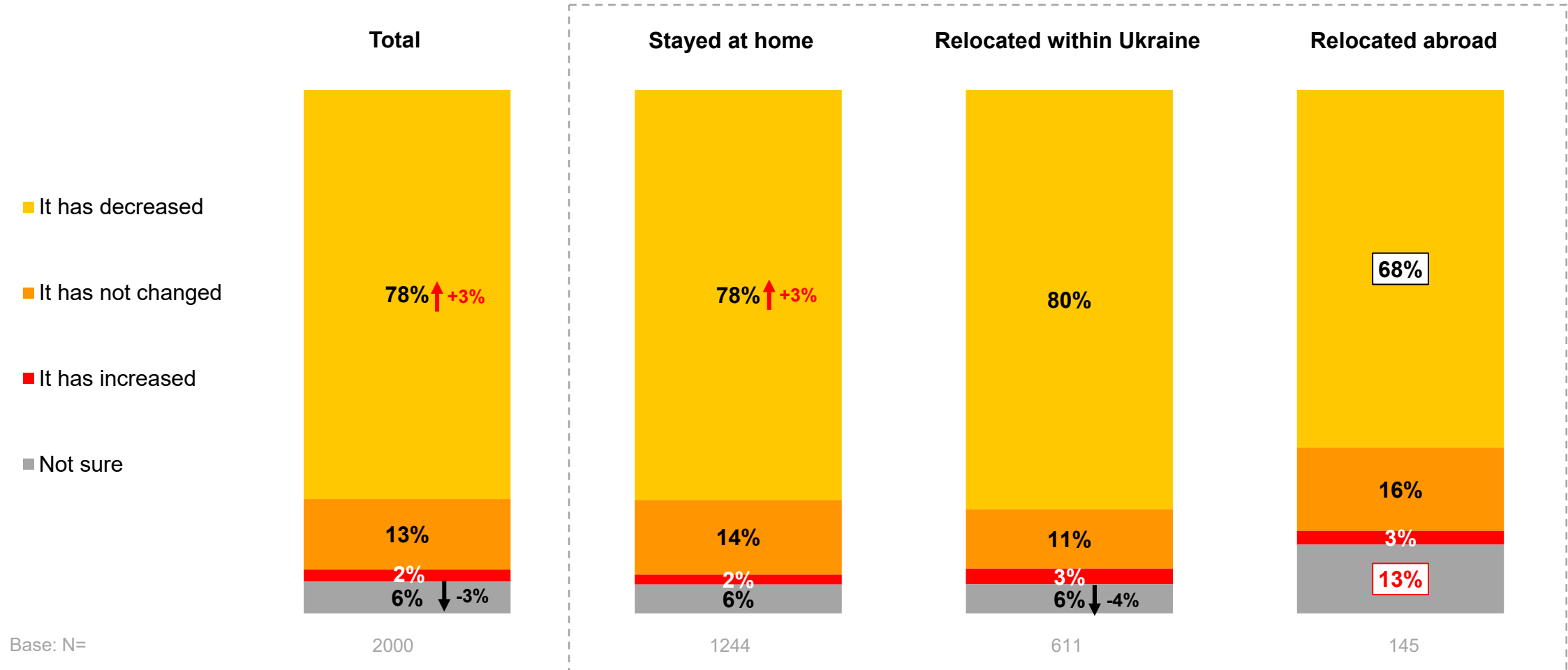
 Numbers that are statistically significantly **higher** /  **lower** for a group, compared to the sample as a whole

 Numbers that are statistically significantly **higher** /  **lower**, compared to the previous wave of the study 94

INCOME CHANGES

by migration status

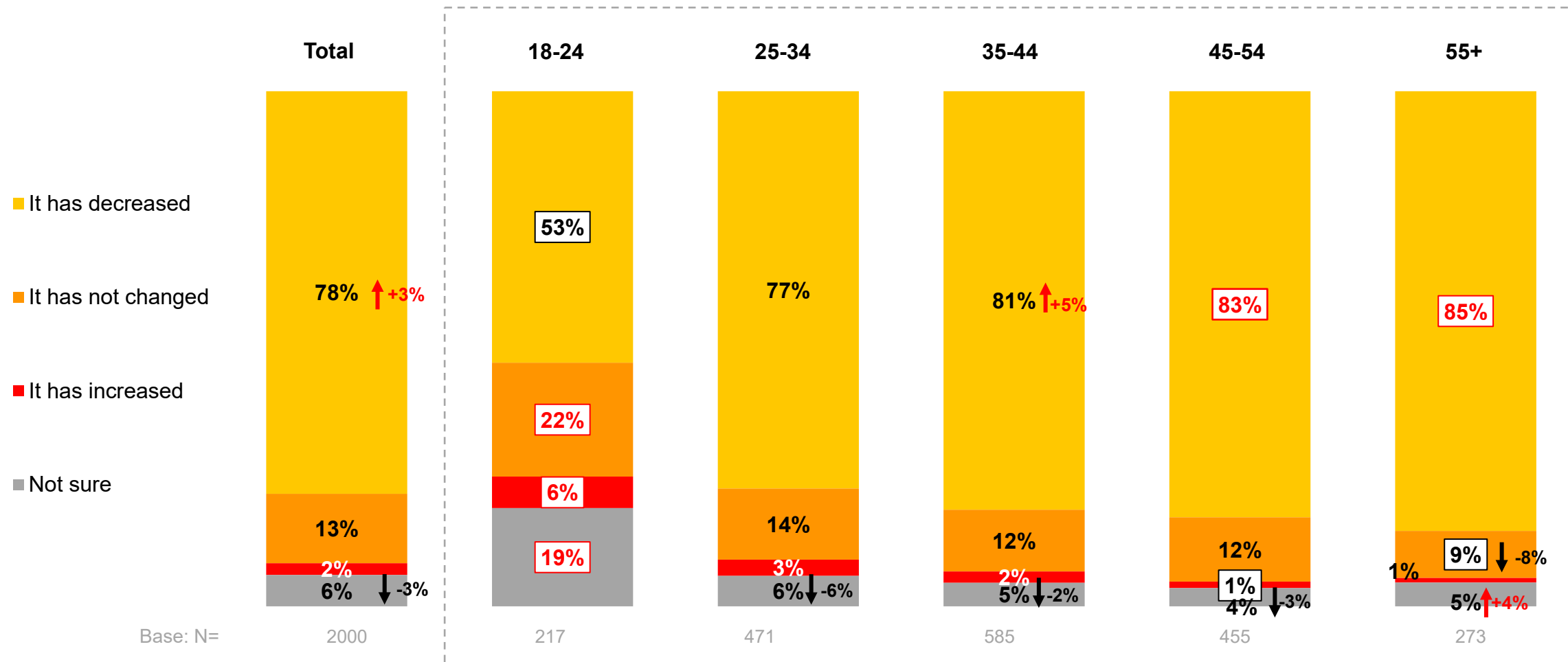
The smallest share of those whose income has decreased since the beginning of the war is among respondents who went abroad; At the same time, for this category of respondents, it is generally more difficult to assess the dynamics of their own income. In the twelfth wave, among those who stayed at home, there was an increase in the percentage of those who declare a decrease in income since the beginning of full-scale war.



INCOME CHANGES

by age

The largest shares of those whose income decreased were recorded among respondents aged 45+; also, the corresponding share increased among respondents aged 35-44. Respondents aged 18-24 declare about the decrease in their incomes the least.

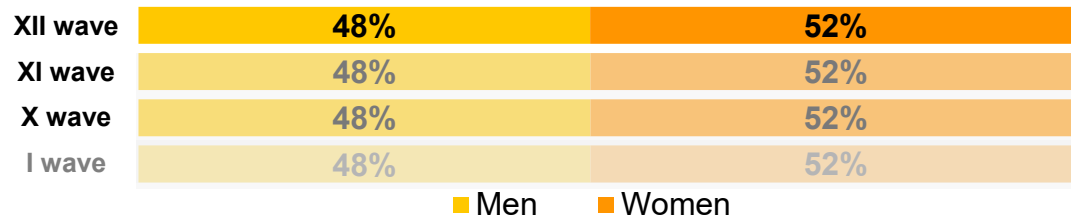


SAMPLE STRUCTURE

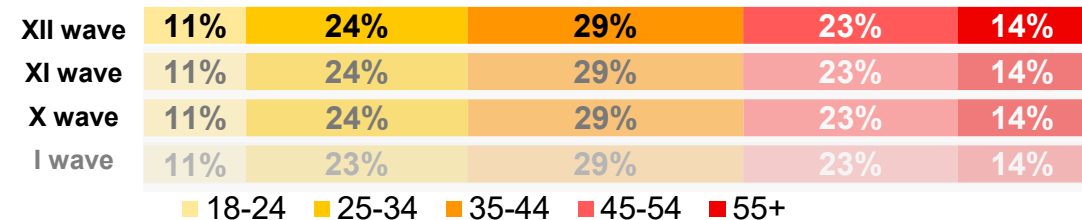


SAMPLE STRUCTURE

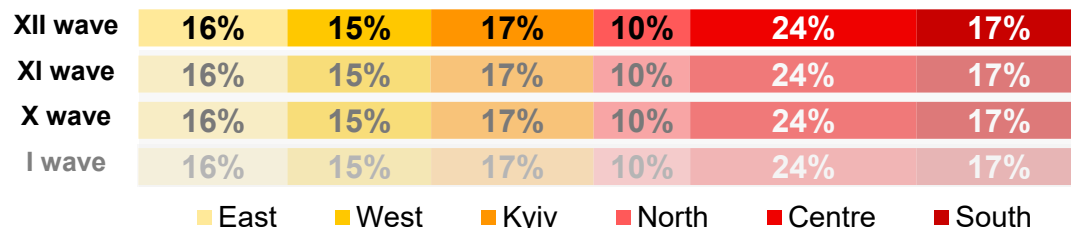
Gender



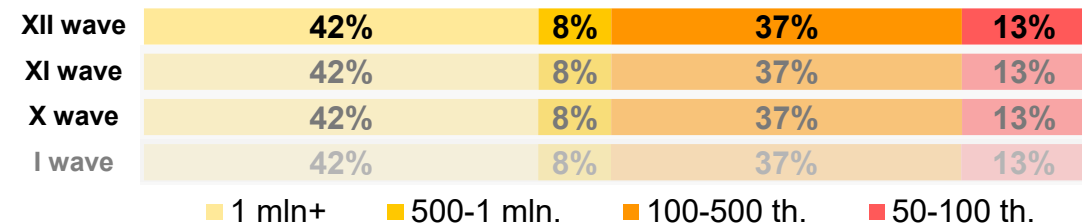
Age



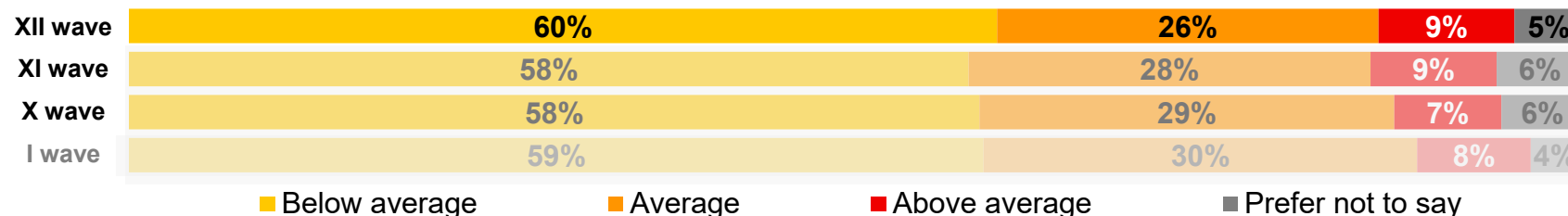
Region (before the war)



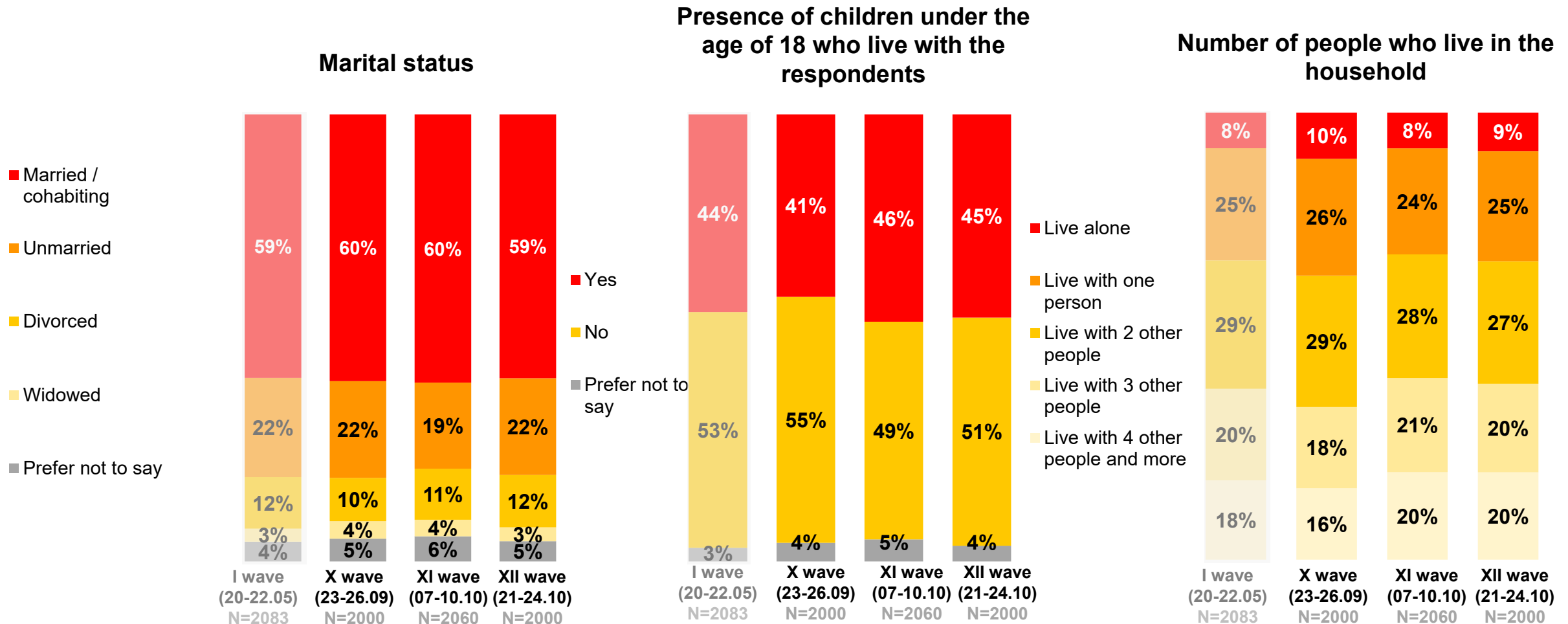
Size of settlement (before the war)



Income level




SOCIO-DEMOGRAPHIC PROFILE



SOCIO-DEMOGRAPHIC PROFILE

by migration status (XII wave)

		Total	Stayed at home	Relocated within Ukraine	Relocated abroad
Gender	Men	48%	48%	52%	32%
	Women	52%	52%	48%	68%
Age	18-24	11%	10%	10%	19%
	25-34	24%	22%	29%	19%
	35-44	29%	29%	30%	30%
	45-54	23%	25%	20%	17%
	55-60	14%	15%	11%	16%
	60+	14%	15%	11%	16%
Region (before the war)	East	16%	7%	31%	25%
	West	15%	19%	6%	19%
	Kyiv	17%	15%	22%	22%
	North	10%	11%	10%	5%
	Centre	24%	30%	14%	17%
	South	17%	18%	17%	11%
Income level	Below average	60%	63%	57%	43%
	Average	26%	25%	27%	34%
	Above average	9%	8%	11%	15%
	Prefer not to say	5%	4%	6%	8%
Marital status	Married / cohabiting	59%	59%	63%	46%
	Unmarried	22%	20%	22%	28%
	Divorced	12%	12%	10%	14%
	Widowed	3%	3%	2%	6%
	Prefer not to say	5%	5%	4%	5%
Presence of children under the age of 18 who live with the respondents	Yes	45%	44%	48%	47%
	No	51%	53%	48%	48%
	Prefer not to say	4%	3%	4%	4%
Number of people who live in the household	Live alone	9%	10%	7%	8%
	Live with one other person	25%	27%	21%	24%
	Live with two other people	27%	25%	32%	24%
	Live with three other people	20%	19%	23%	18%
	Live with 4 other people and more	20%	20%	17%	27%
Base, N		2000	1244	611	145


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



Centre for
Economic
Recovery

°Gradus Research
Company

✕ Advanter

