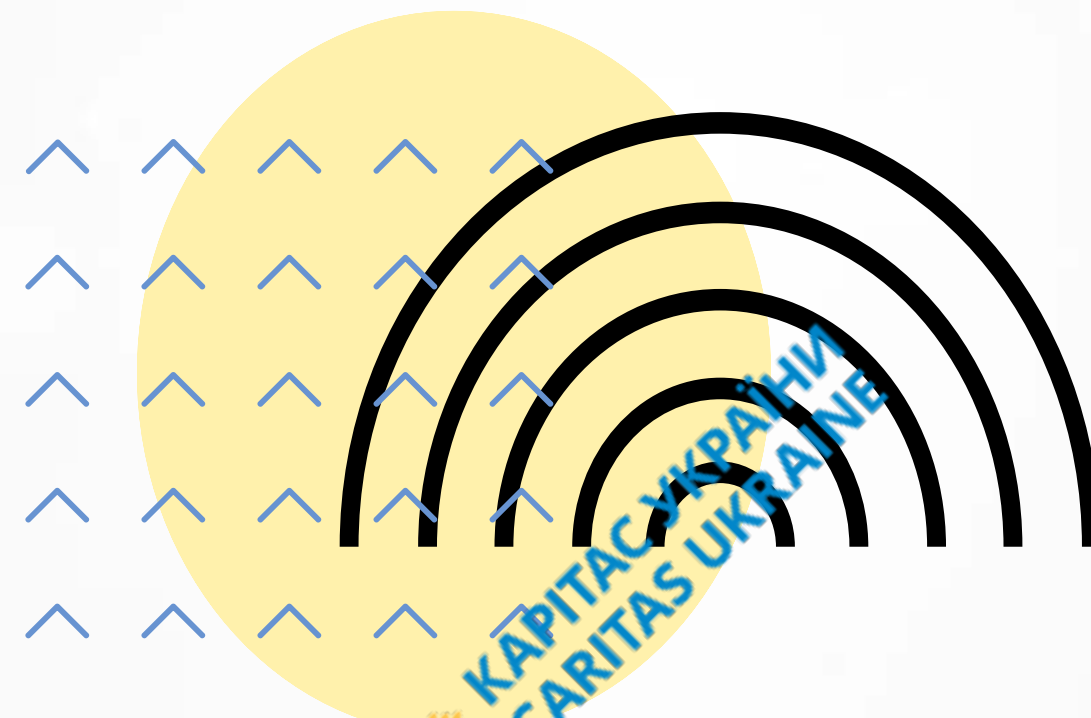
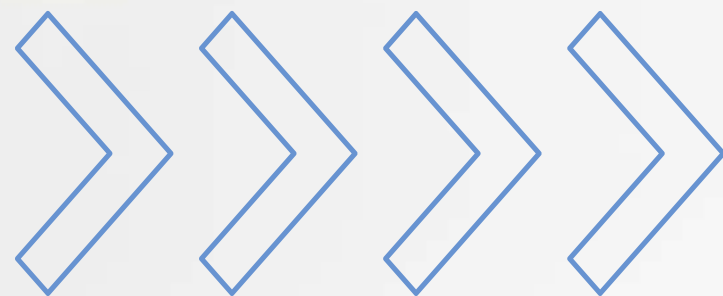


REPORT
RESULTS OF THE
RESEARCH



NEEDS ASSESSMENT

October 2024

METHODOLOGY

This report presents the results of a survey of beneficiaries on their needs and priority types of assistance.

Data collection method: telephone survey using a standardized questionnaire in Kobo

Data collection period: 24 September - 02 October 2024

Sample type: stratified, quota, random at the selection stage

Quota parameters:

1. area of residence
2. type of settlement
3. gender

Sample size: 1058 respondents.

TARGET AUDIENCE

The respondents to the survey are people who were registered for assistance with Caritas Ukraine in 2023-2024. Accordingly, the data reflects the opinion of people in need. This may affect the representativeness of the data on the urgency of needs and priority types of assistance at the oblast level and in general. On the one hand, respondents may feel the unmet basic needs more acutely due to social and economic vulnerability, and on the other hand, the assistance provided may also have affected the relevance of certain types of assistance. For example, those who have been helped to find a job or have had their homes repaired may no longer feel the need for these types of assistance.

GEOGRAPHY

Since the research was conducted in the format of a telephone survey and the sample was drawn from Caritas Ukraine's beneficiary databases, only representatives of communities with whom cooperation was established were included in the research. This may affect the representativeness of the data on access to markets, the correctness of key networks, etc.

INTERVIEWERS

Data collection was carried out by M&E specialists of local Caritas organizations, which could have influenced the respondents' answers. For example, in anticipation of 'benefits' in the form of humanitarian aid, people could indicate a more acute degree of unmet basic needs.

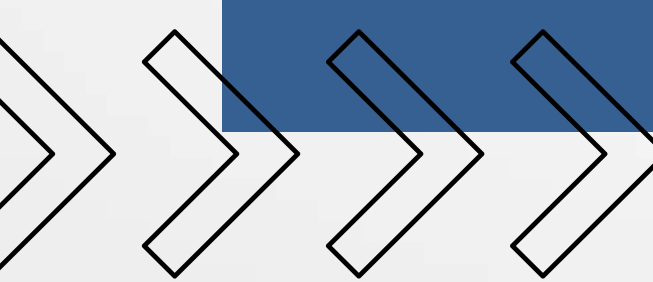
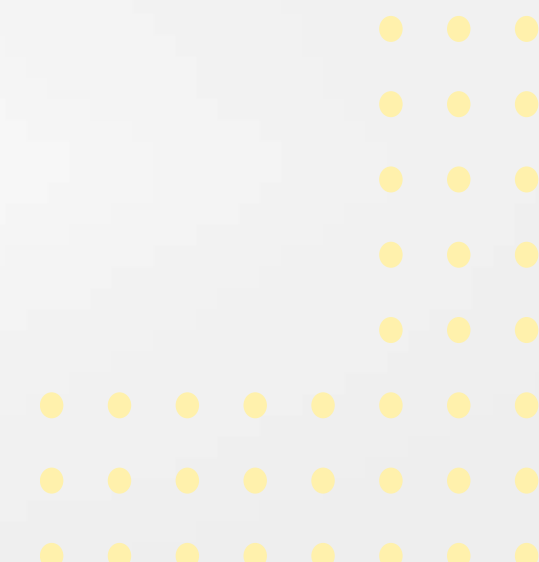
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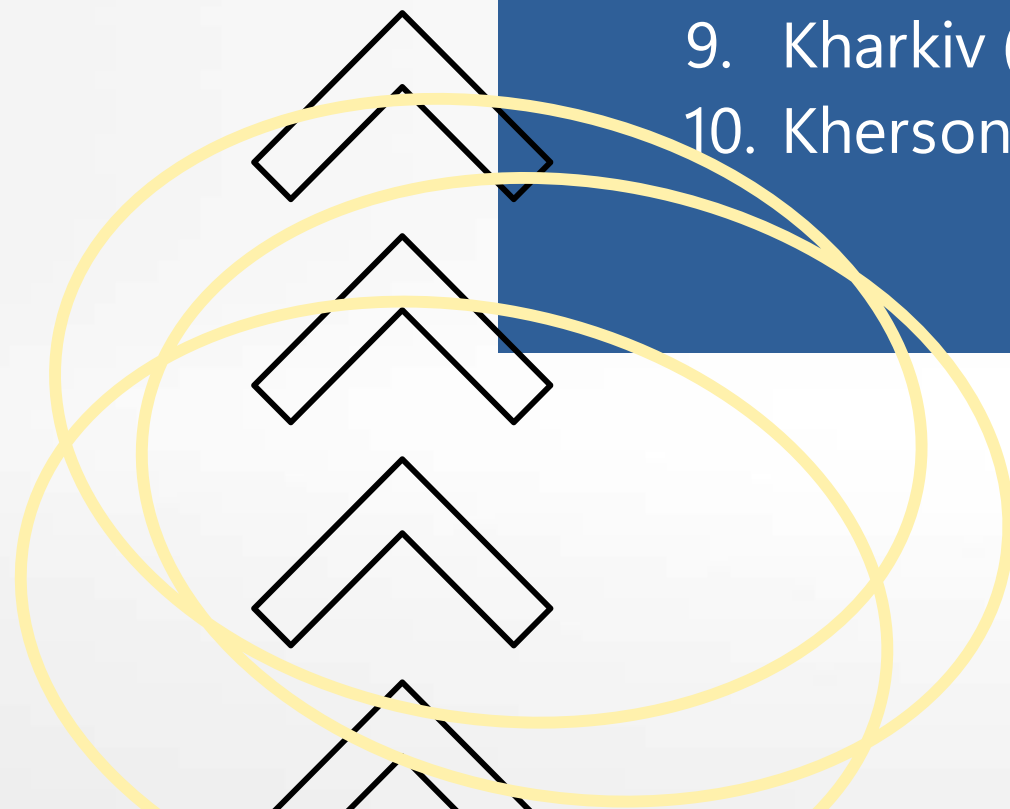
LIMITATIONS RESEARCH



The research covered 10 regions of Ukraine.

The data collection involved monitoring and evaluation specialists from of local Caritas organizations:

1. Dnipro (Caritas Donetsk in Dnipro, Caritas Kamianske)
2. Donetsk (Caritas Kramatorsk)
3. Zaporizhzhia (Caritas Zaporizhzhia)
4. Kirovohrad (Caritas Kropyvnytskyi)
5. Mykolaiv (Caritas Mykolaiv)
6. Odesa (Caritas Odesa)
7. Poltava (Caritas Poltava)
8. Sumy (Caritas Sumy)
9. Kharkiv (Caritas Kharkiv)
10. Kherson (Caritas Kherson, Caritas Beryslav)



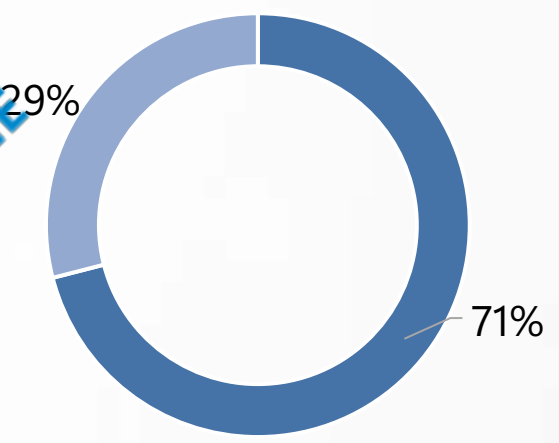
SOCIAL PORTRAIT RESPONDENTS

Respondents by region

Oblasts	Number of respondents	
	in frequencies	in %
Dnipro	101	10%
Donetsk	100	9%
Zaporizhzhia	122	12%
Kirovohrad	102	10%
Mykolaiv	100	9%
Odesa	106	10%
Poltava	100	9%
Sumy	124	12%
Kharkiv	102	10%
Kherson	101	10%
Total	1058	100%

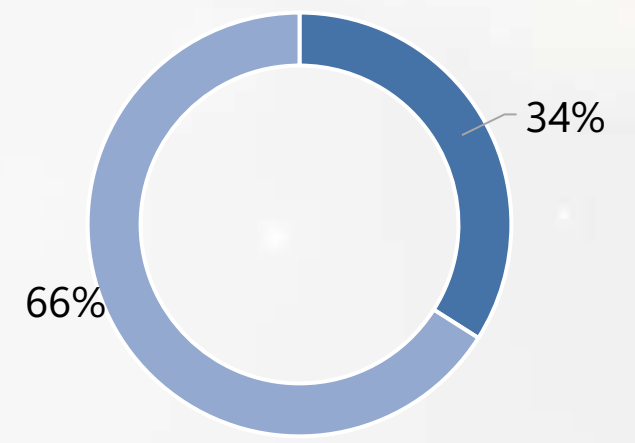


Gender



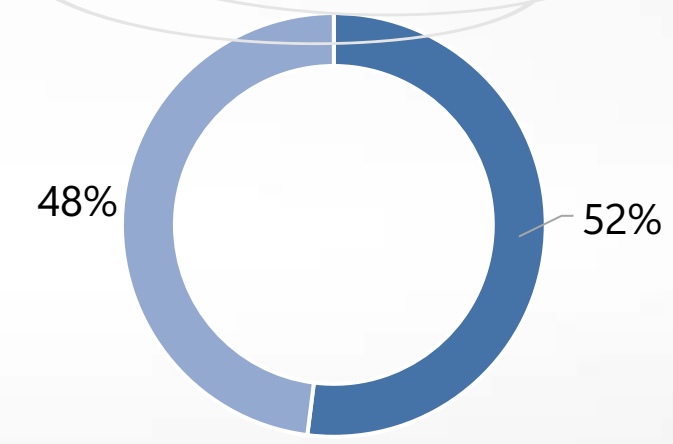
■ women ■ men

Age



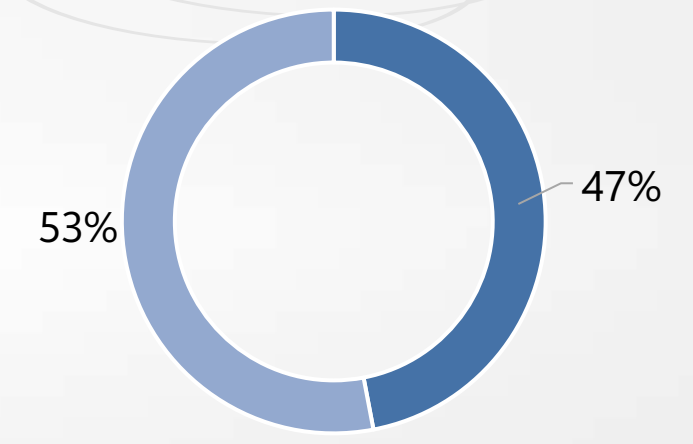
■ 18-49 years ■ 50 more years

Terrain type



■ urban ■ rural

Social status



■ IDP ■ local



SOCIAL PORTRAIT RESPONDENTS

Respondents by vulnerability categories
(in %, multiple answers)


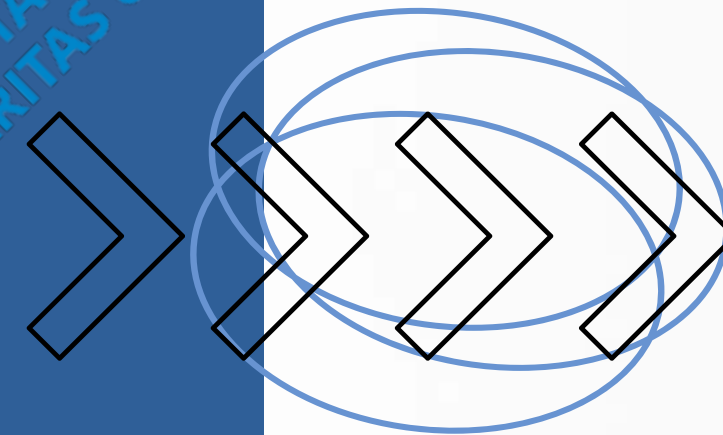
Categories	%
Single mother/father or guardian of minor children	7%
Pregnant woman or breastfeeding mother with children under 3 years of age	4%
People with serious illnesses	13%
People with disabilities	26%
Large families with 3 or more minor children	6%
Single elderly people (55+)	40%
None of the above categories	20%



AVERAGE COMPOSITION HH

Average number of household members by region

Oblasts	Average number of HH members
Dnipro	2,6
Donetsk	1,9
Zaporizhzhia	2,6
Kirovohrad	2,6
Mykolaiv	2,4
Odesa	2,6
Poltava	3,0
Sumy	2,8
Kharkiv	2,0
Kherson	2,3

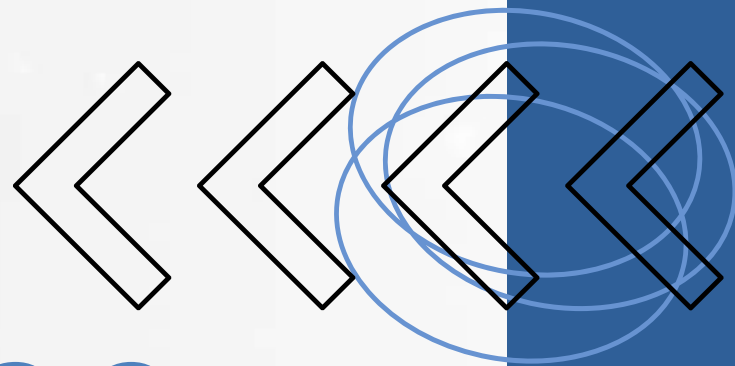


2,5 people
average composition
households



4 156 UAH

average income per
1 person



10 390 UAH

average income per
1 HH

AVERAGE INCOME HH

Average income per person and at the household level by region

Oblasts	Average income per 1 person	Average income per 1 HH
Dnipro	4016	10442
Donetsk	4330	8227
Zaporizh	4271	11105
Kirovohrad	4110	10686
Mykolaiv	4582	10997
Odesa	4095	10647
Poltava	4576	13728
Sumy	3692	10338
Kharkiv	4532	9064
Kherson	3513	8080

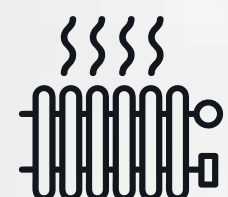




TOP 5 PRIORITY TYPES OF ASSISTANCE



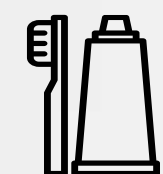
Multipurpose cash assistance (88%)



Payment for utilities services (51%)



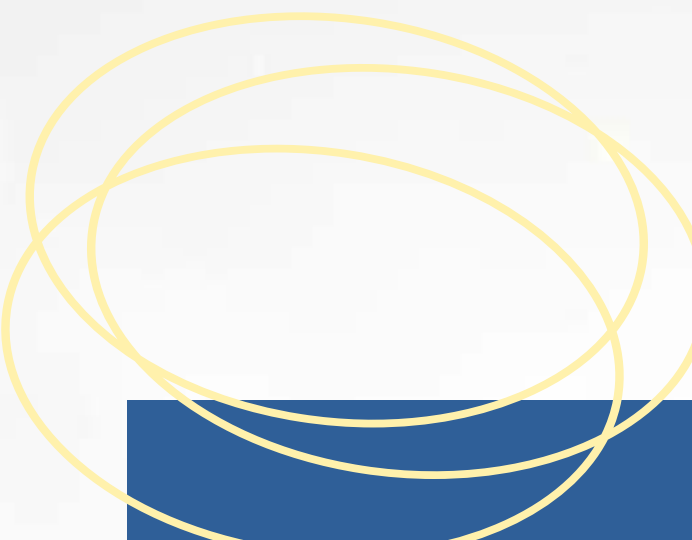
Medicines (50%)



Hygiene products (46%)



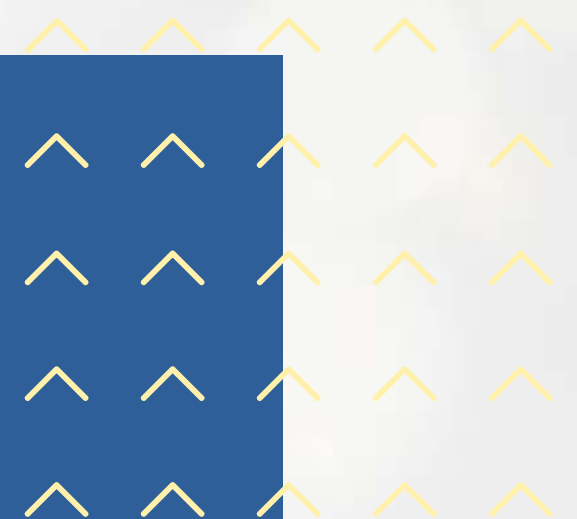
Food (39%)



In-kind assistance in the form of heating materials was not included in the top 5 needs at the level of the total population because not all respondents use solid fuel - for example, they live in apartments or houses with gas heating. Among those who use heating materials to heat their houses, 78% do not actually cover their solid fuel needs (critically do not cover or cover to a lesser extent). This is primarily due to high prices and low financial capacity of the population. Among the study regions, the highest demand for heating materials is in Donetsk, Kharkiv and Mykolaiv regions.

There are regional differences in the extent to which key needs are met and in the priority types of assistance. For example, almost every fifth respondent (19%) has a low level of coverage of drinking water needs, but the most acute problem with access to drinking water is experienced by residents of Dnipro, Kherson, Zaporizhzhia and Kirovohrad oblasts, and the best situation is in Odesa and Sumy oblasts.

Housing repairs as a type of assistance at the level of the general population are relevant for 7% of respondents, and in none of the regions of the research were they included in the top 5 needs. At the same time, every fifth respondent from Mykolaiv (21%) and Dnipro (18%) regions needs it.



POPULATION NEEDS

Rating of areas where the needs of the population are least met (*lesser or critical coverage*)

1. Medicines and medical services (75%)
2. Hygiene products (65%)
3. Payment for utilities (electricity, centralized heating, centralized gas supply) (65%)
4. Basic household goods and seasonal clothing (50%)
5. Food (45%)
6. Decent housing and living conditions (36%)
7. Purchase of heating materials (33%)
8. Drinking water (19%)
9. Technical water (8%)



PRIORITY MODALITIES

CASH

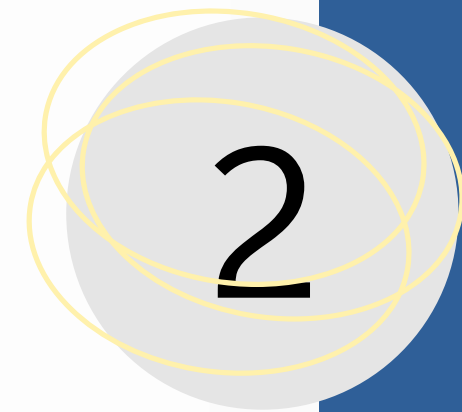
86% chose financial assistance (targeted or multi-purpose) as their first priority

IN-KIND ASSISTANCE

52% chose as a second priority

VOUCHER

50% chose it as a third priority



EMPLOYMENT NEEDS

According to the survey, every 4th respondent (24%) is engaged in agricultural activities. Every 20th respondent (5%) uses agriculture as the main or additional source of income.

The highest rates of agricultural practice are in Mykolaiv (35%), Sumy (35%), Dnipro (34%), Kherson (33%) and Zaporizhzhia (32%) regions.

9% of respondents are actively looking for a job. This requirement is higher in Poltava and Dnipro oblasts, at 14% and 19% respectively. The main reasons for being unemployed:

- have no one to leave minor children/sick relative with while they work (14%)
- working conditions do not meet their needs (23%)
- Do not know where to look for a job (19%)

The average expected salary for job seekers is UAH 13,925.

At the same time, these amounts range from UAH 2,000 to UAH 40,000 and have regional differences. Thus, residents of Kherson region have the lowest salary expectations, while residents of Odesa region have the highest.

every **4**
respondent is engaged
in agricultural activities

9% respondents
are actively looking
for work

13 925 UAH

average expected
salary amount

55%

expect problems with heating the apartment

WINTERIZATION

Regardless of the method of heating their homes and the area they live in, 55% of respondents foresee problems with heating their homes this winter. These figures are significantly higher in Kirovohrad and Kharkiv regions, where 75% of respondents foresee difficulties with heating.

The main reasons for possible problems with heating are: high prices (69%), irregular electricity supply/frequent power outages (31%), damaged gas supply system (22%), damaged electricity supply system (20%).

12 902 UAH

average amount spent on heating costs last season

The main type of heating in the home
(in %)

Type of heating	%
Gas	32%
Electricity	4%
Centralised heating	36%
Wood	24%
Coal	1%
Briquettes	2%
Pallets	0%
Other	1%
Total	100%

In the last heating season, depending on the heating system, the average amount spent on heating a home was

- solid fuel - UAH 17,960
- gas - 14 063 UAH
- centralized heating - UAH 12,025
- electricity - UAH 10,972

Given the devaluation of the hryvnia, a significant increase in electricity, fuel, and home heating costs will be significantly higher in the winter season of 2024-2025. This should be considered when planning winterization activities (cash for utilities, cash for heating, heating materials, etc.)

OPERATION OF KEY NETWORKS

Electricity supply. 96% of respondents report that the power supply in their households is working properly - there is electricity all the time or there are short-term power outages. According to the survey, the most difficult situation with the energy sector is in Zaporizhzhia, Sumy, Kharkiv and Kirovohrad regions, where more than 5% of respondents indicate that at the time of the survey there were long power outages or significant interruptions in electricity supply.

Water supply. 78% of respondents have regular access to centralized water. Problems with water supply are most relevant for residents of Dnipro, Kherson and Zaporizhzhia regions, where 9%, 7% and 4% of respondents report a lack of water, respectively.

Heat supply. According to the survey, 76% of respondents use district heating services, and 36% use it as the main method of heating their homes. 73% of the 76% of respondents did not face any serious problems with the district heating system last season - heat was available all the time or most of the time.

Garbage collection. 85% of respondents believe that their settlement has a well-established solid waste management system.

96%

have not experienced any long power outages at the time of the survey

78%

have constant access to water (centralized water supply)

76%

use centralized heating services

85%

have a well-established solid waste management system



ACCESS TO MARKETS AND FINANCIAL SERVICES



92%

indicate an increase in prices for basic goods and services over the past month. This is the least relevant for respondents from Kirovohrad (82%) and Kharkiv (83%) oblasts, while the highest price increases were reported in Donetsk (96%), Kherson (96%), and Sumy (97%) oblasts.



96%

were able to get to the market(s) for goods/services in the last two weeks to buy food and other necessary items.



93%

have no problems with access to cash withdrawals, but depending on the region, this share varies from 85% to 98%.



97%

have the opportunity to use cashless payments (pay by card through the terminal). By region, the figure is almost stable (92-100%), except for Poltava region, where 89% of people can use the terminal to buy goods without any problems.

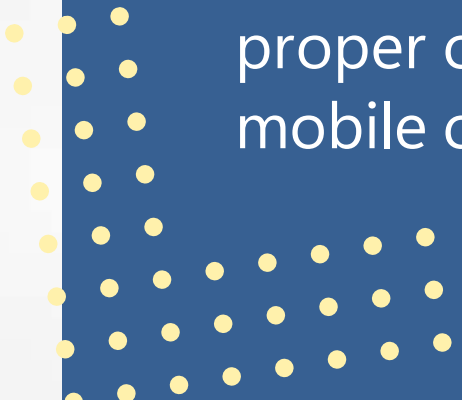


COMMUNICATIONS AND INTERNET



96%

of respondents are
informed about the
proper operation of
mobile communications



81%

confirm the correct
operation of the Internet
in their locality

