

. Key perceptions of internally displaced people in Ukraine .

Net promoter analysis of second round of data collection

March 2015



**GROUND TRUTH
SOLUTIONS**

Putting people first in humanitarian operations.

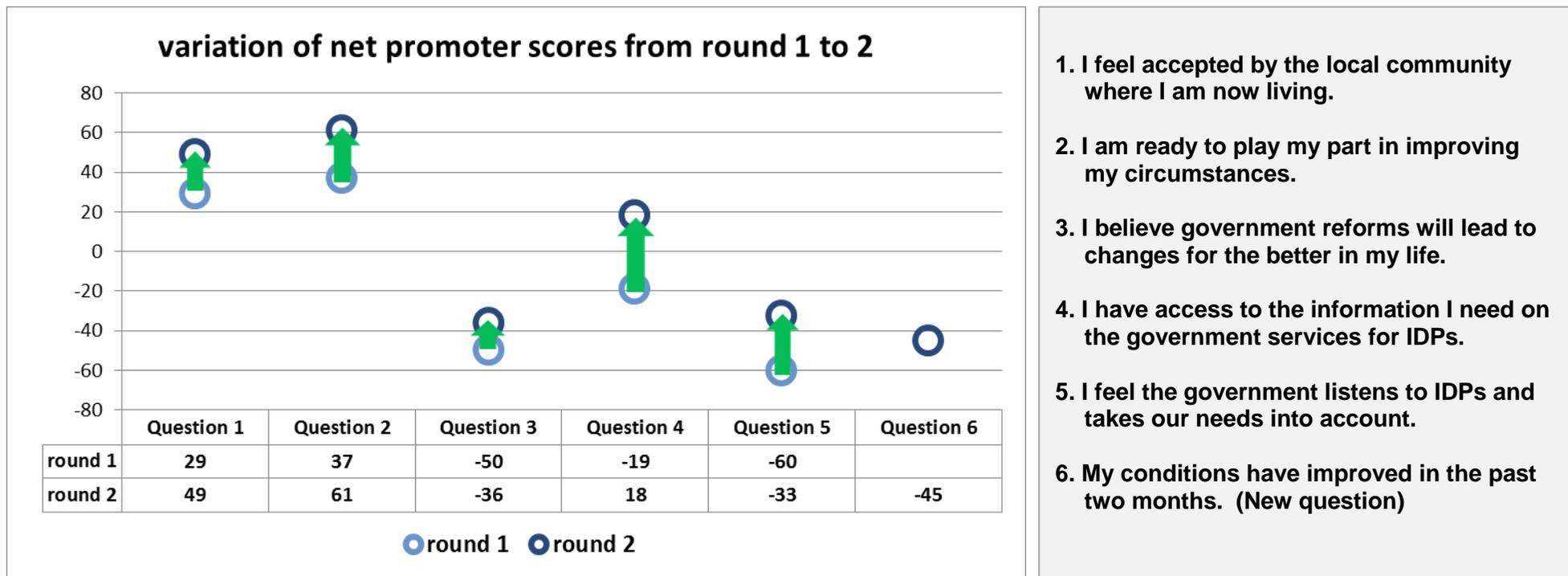
Analysis of data collection: round 2.

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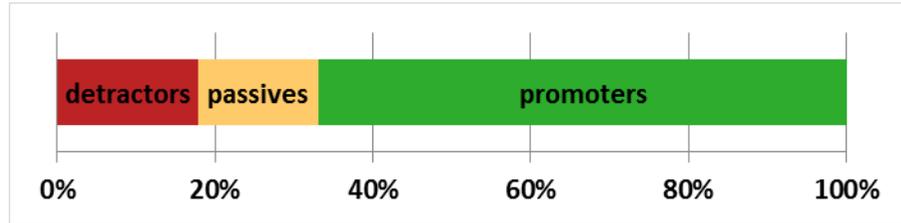
1. Summary of findings

Findings from the 2nd round of data collection, which took place in late February / early March 2015, show that since the 1st round in November 2014 perceptions among Internally Displaced People (IDPs) have risen on all issues. Question 6, which asks if conditions have improved in the past 2 months, is new. The Net Promoter Score (NPS) sets the bar high (see section 3 on methodology) and scores have, for the most part, moved in the right direction since round 1. Scores from round 2 indicate that IDPs are:

1. More positive about their acceptance by other Ukrainians - with an overall NPS of 49 in round 2 against 29 in round 1.
2. Ready to play their part, with the NPS for this question up from 37 to 61.
3. Sceptical about the likely impact of government reforms. Scores are still negative on this question but marginally up (NPS -50 to -38).
4. Notably more positive about access to information about government services (NPS -19 to 18)
5. Negative about the government’s commitment to listening to them and taking their views into account. Although still in negative territory, scores are up from NPS -60 to -33.
6. Pessimistic about improvements in conditions over the previous two months (NPS: - 45). *This is a new question.*

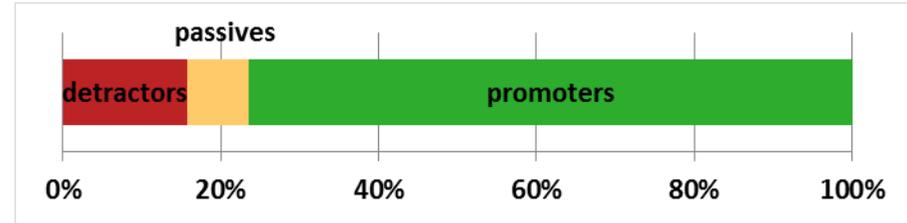


Question 1: I feel safe and accepted by the community where I am now living. NPS: 49



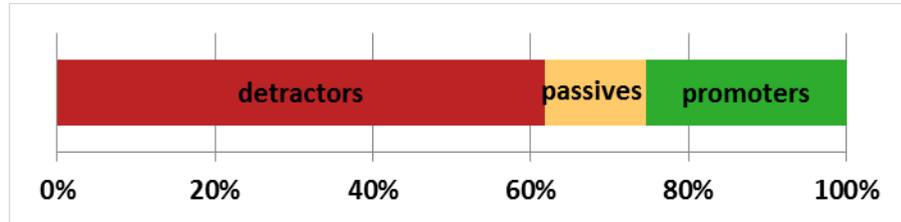
People have become more positive about their acceptance in the local communities. Highest scores are in Kharkivska and Zaporizka.

Question 2 – I am ready to play my part in improving my circumstances. NPS 61



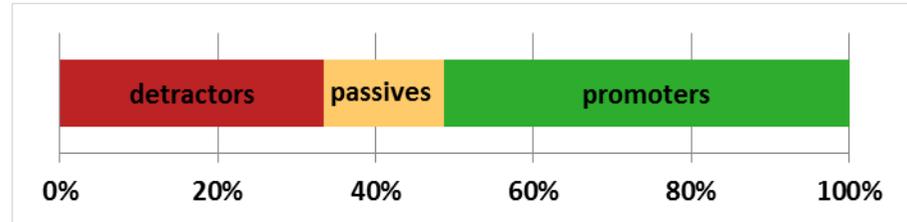
People are extremely motivated to play their part in improving their circumstances. Respondents in Donetsk show least 'agency'.

Question 3 - I believe government reforms will lead to changes for the better in my life. NPS -36



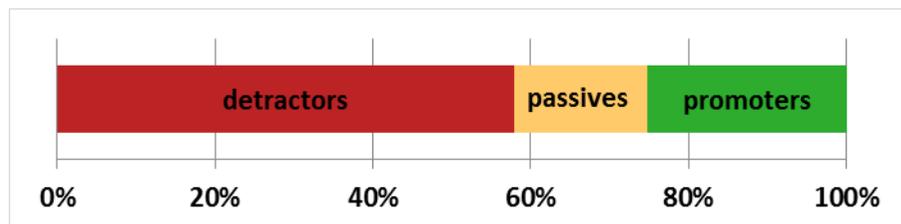
People have slightly more positive view of the reforms. Respondents in Kyivska are notably unimpressed by government reforms.

Question 4 – I have access to the information I need on the government services for IDPs. NPS 18



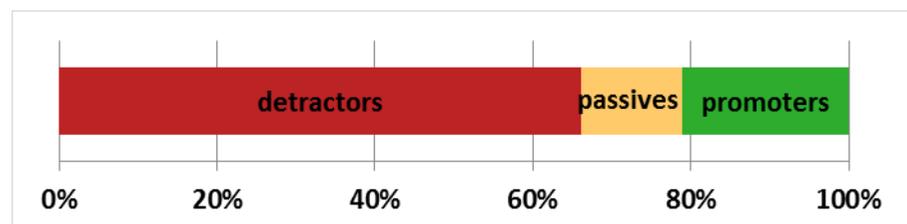
Peoples' views on access information have improved markedly.

Question 5 – I feel the government listens to IDPs and takes our needs into account. NPS - 33



IDPs are still negative about the government's commitment to listening to their needs and taking them into account, but scores have edged up since round 1.

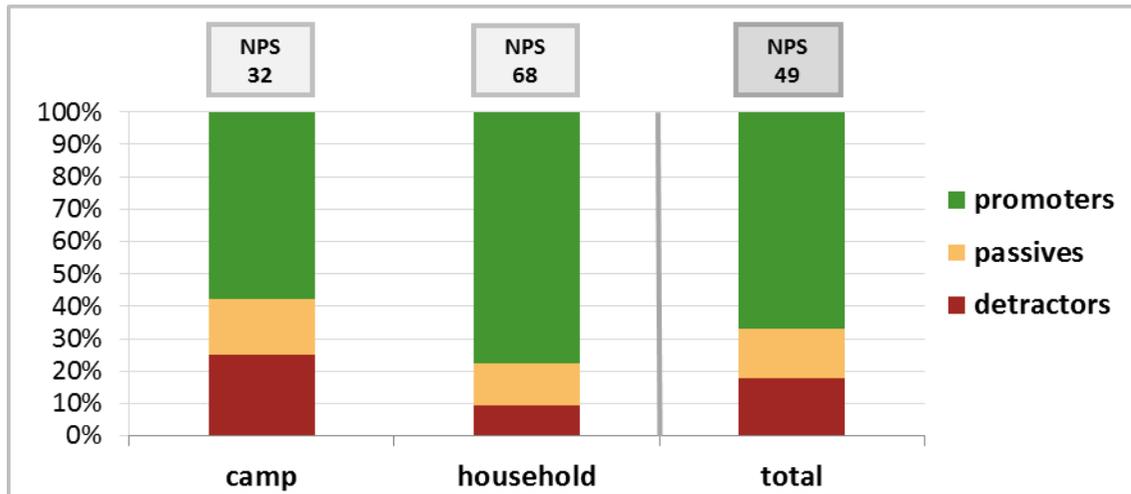
Question 6 – I feel that my conditions have improved in the past two months. NPS -45



IDPs do not see improvement in their conditions over the past 2 months. Scores across all demographic groups are extremely negative.

2. Question by question analysis

Question 1 – I feel accepted by the local community where I am now living



Internally displaced people have become more positive about their acceptance in the places where they are currently living, with an overall NP score of 49 (vs. 29 round 1).

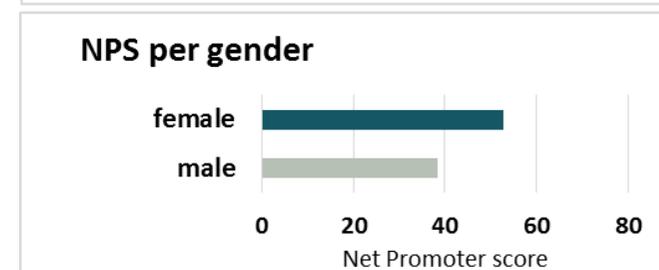
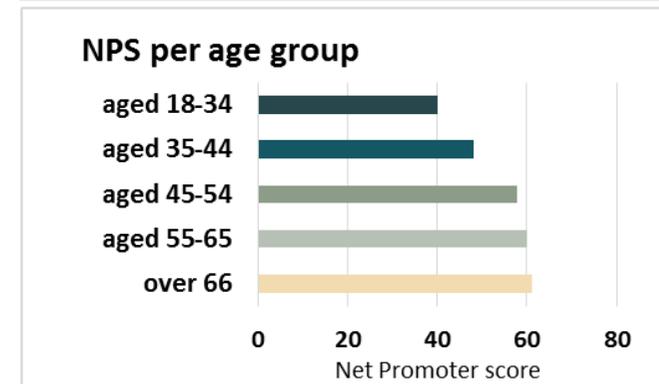
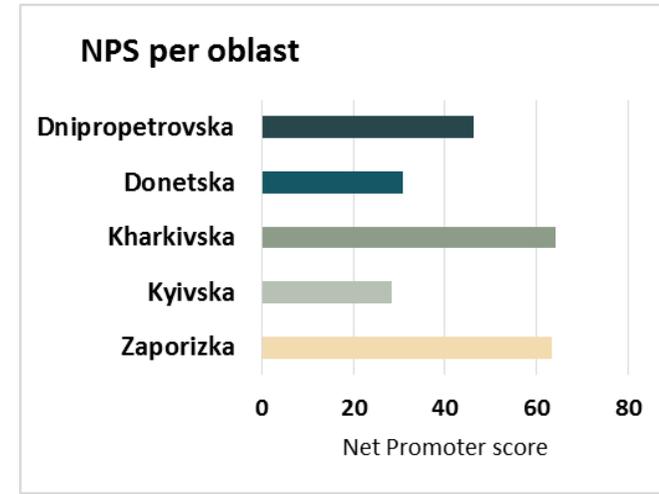
Highest NP scores are in Kharkivska and Zaporizka. Kyivska has the highest percentage of detractors - resulting in the lowest NPS. Respondents from Crimea feel least accepted (NPS: 0); those from Luhanska most accepted (NPS: 64).

The older the respondents, the more they feel accepted. Respondents aged from 18 to 34 years have the highest percentage of detractors (24% compared to 18% for all respondents)

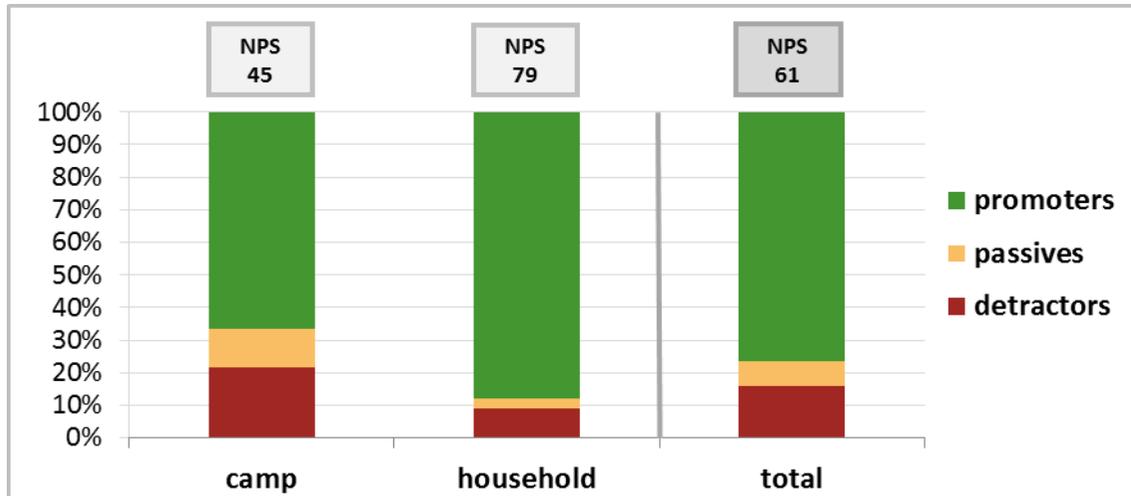
Respondents who are self-employed give low ratings, while those working for a state-owned enterprise feel highly accepted (86% of people working for the state are 'promoters').

Qualitative feedback:

Reasons given for positive feedback are that other citizens are friendly, understanding or helpful. Some 7% of respondents say they have encountered negative or openly hostile attitudes as well as discrimination in the job market and over accommodation. Kyivska stands out with some 25% of respondents saying they have encountered hostility of some kind.



Question 2 – I am ready to play my part in improving my circumstances



Responses show that IPDs' readiness to play their part is extremely high. The NPS for this question is up from 37 to 61. People in private accommodation are more positive than those in collective centres.

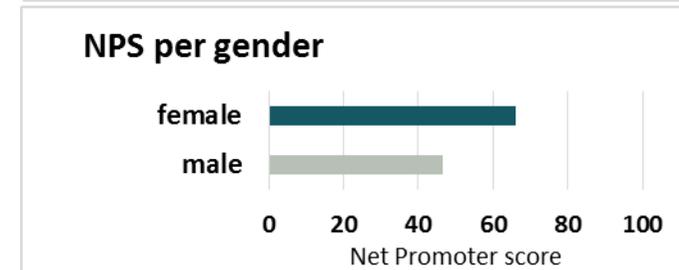
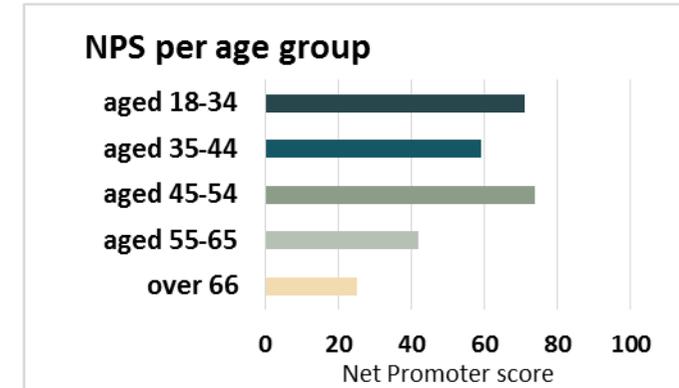
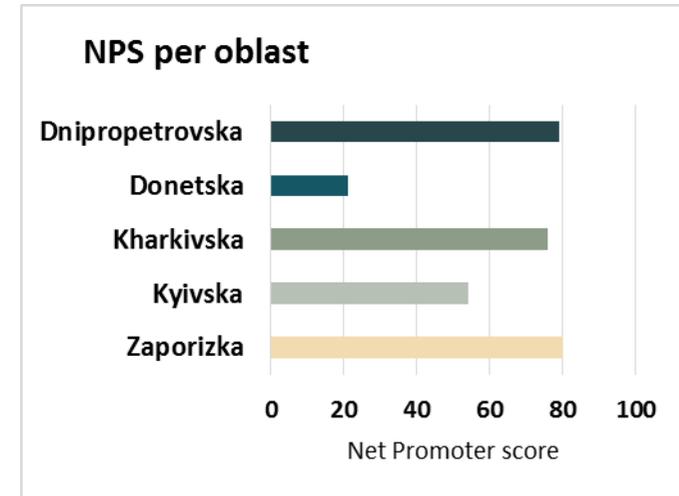
People in Kyivska and Donetsk oblasts are most ready to play their part, with NPSs of 80 and 89 respectively. As in round 1, Donetsk has the lowest NPS (21).

IDPs who have moved from Luhanska oblast are the most motivated to play their part (NPS 79). This compares with an NPS of 55 for IDPs from Donetsk, and NPS 0 for people from Crimea.

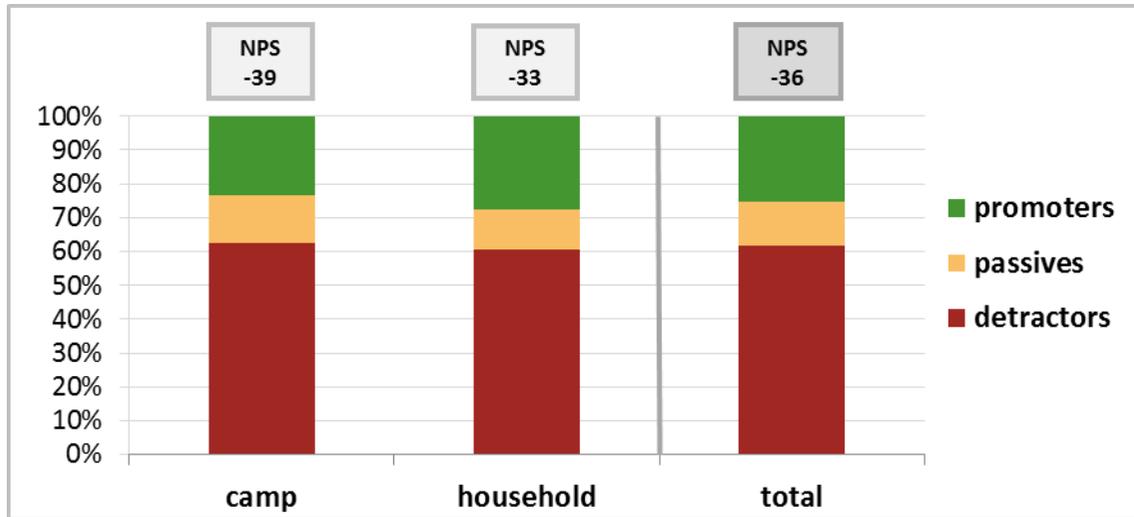
There are more promoters among female respondents than among men. People aged 18 to 34 years and 45 to 54 years remain notably motivated; respondents above 66 show least motivation.

Of note:

People are especially motivated to play their part in Zaporizka and Dnipropetrovska.



Question 3 - I believe government reforms will lead to changes for the better in my life



Respondents have low expectations of the likely impact of government action. Ratings across all demographic groups are negative. People living in private accommodation are as disenchanted as those accommodated in collective centres or camps.

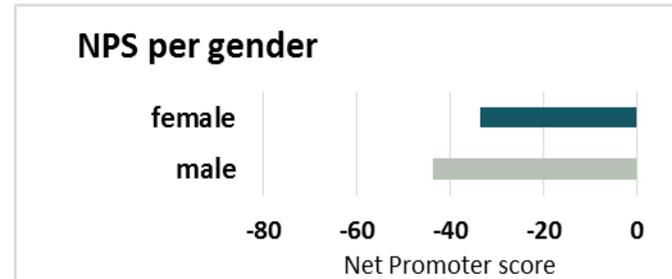
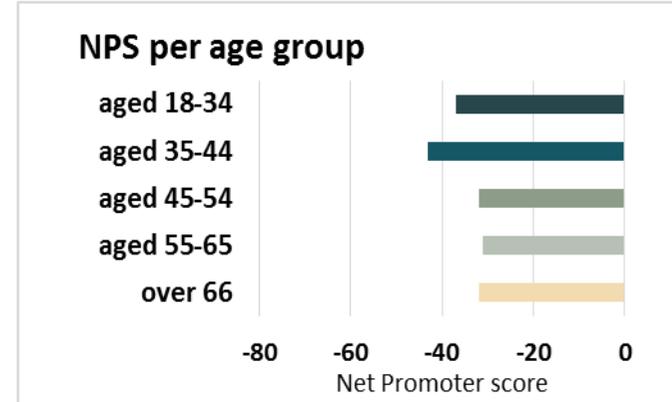
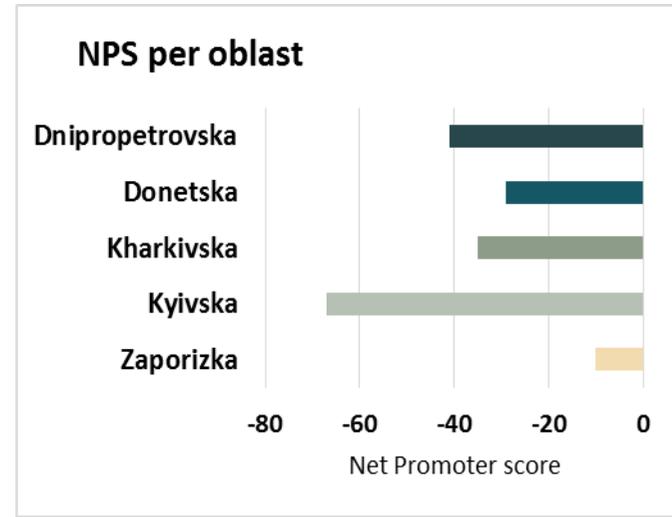
IDPs in Kyivska are especially unimpressed by government reform efforts with an NPS of -67. This results from 78% of the respondents being in the detractor category.

Men are marginally more negative than women this round (NPS -44 vs -34).

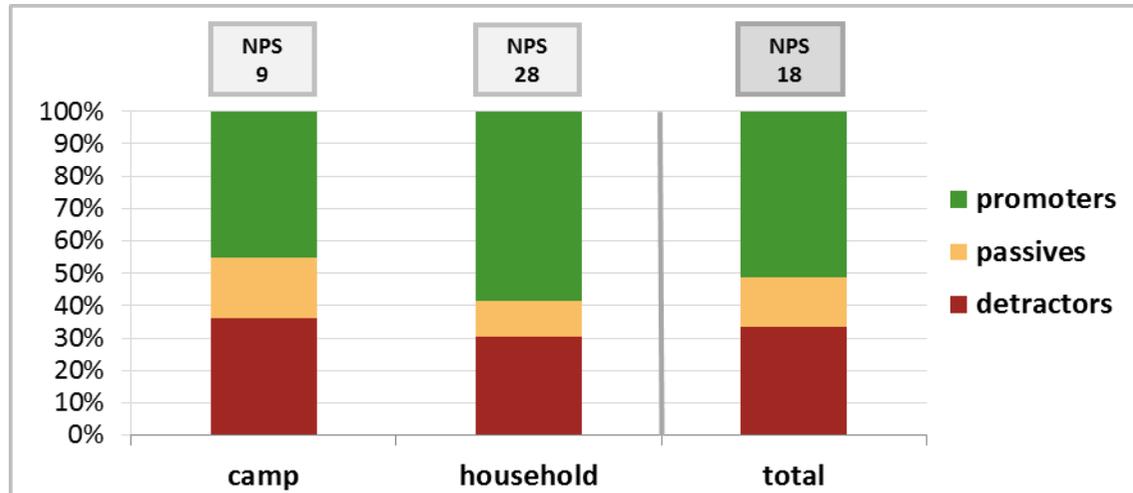
People who have a job are more negative than those who do not. (NPS for employed respondents: -54; self-employed: -64).

Qualitative feedback:

A plurality of respondents say they have not seen any positive impact on their lives so far and that they doubt there will be any down the road. Some 12% of respondents say they don't trust the government and that they have no hope of future changes. At the other end of the spectrum, some 9% of respondents say they see government actions leading to positive outcomes.



Question 4 – I have access to the information I need on the government services for IDPs



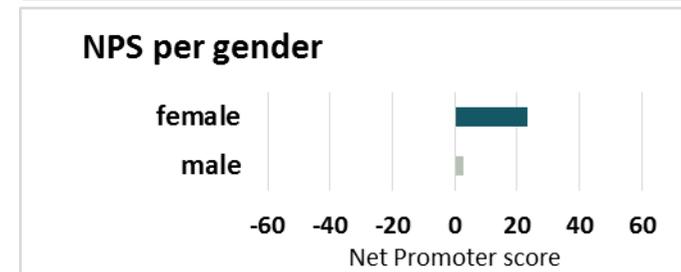
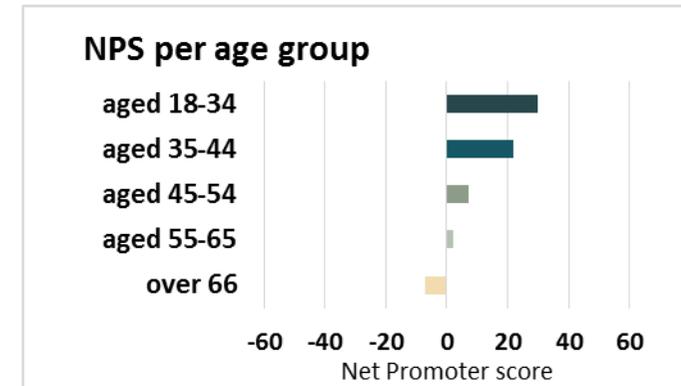
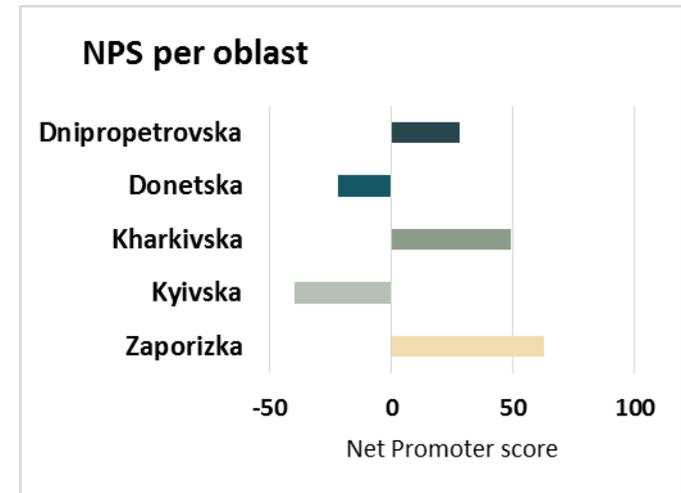
People’s views on their access to information on government services have improved significantly. The net promoter score has increased from -19 in November to 18 in this round.

Female respondents are more satisfied than men (NPS 24 vs 3). Younger respondents say they have better access to the information they need. Older respondents are less positive. Respondents aged between 18 and 34 mostly turn to social media as a source of information, whereas other age groups watch TV. This reflects levels of trust, with the older generation expressing higher trust in TV channels and younger respondents placing more trust in social networks.

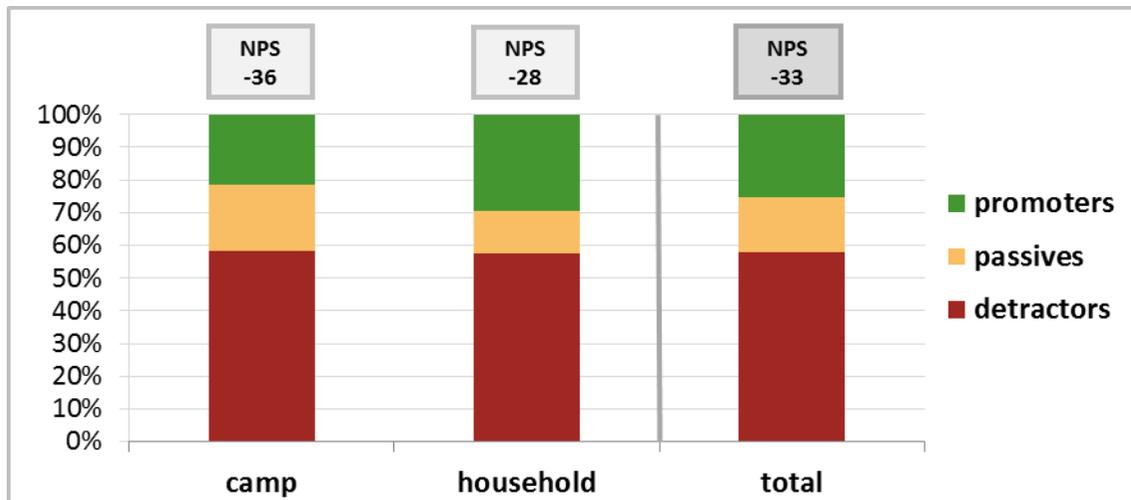
Respondents in Zaporizka are very satisfied with the information they get, giving an NPS of 63. Some 86% say they receive the information they need compared to 42% overall. In Donetsk and Kyivska there would seem to be a lack of information on government services. The NPS in these oblasts is negative, -22 and -40 respectively.

Of note:

In Kyivska a high percentage of people say they have inadequate access to information although this is the oblast where most people say they watch TV, search the internet or explore other sources of information.



Question 5 – I feel the government listens to IDPs and takes our needs it account



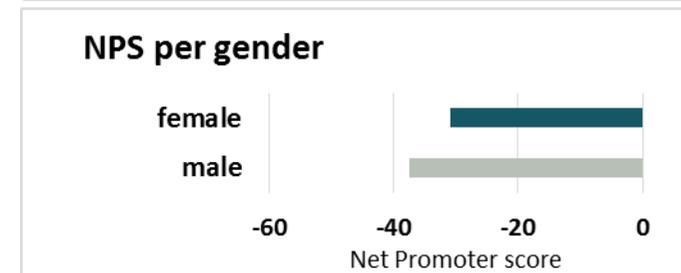
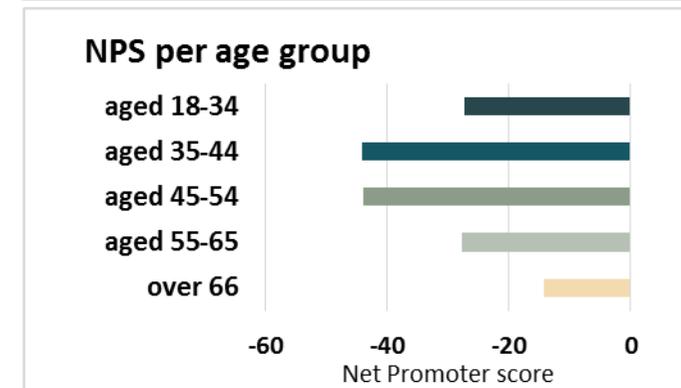
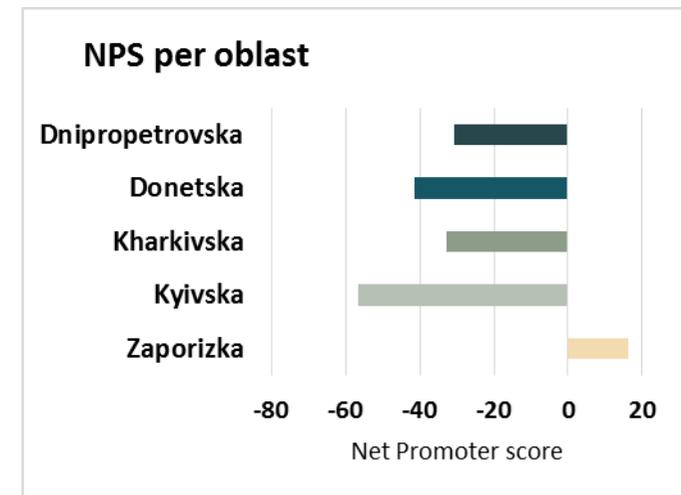
IDPs are still very negative about the government’s commitment to listening to their needs and taking them into account. There are more promoters among people living in private accommodation than among people living in collective centres or camps.

The only oblast with a positive score is Zaporizka (NPS 16). People in Kyivska are most negative (NPS of -57). Some 72% of the respondents in this oblast are in the detractor category. People who have moved from Luhanska oblast are more negative than IDPs from Donetsk or Crimea.

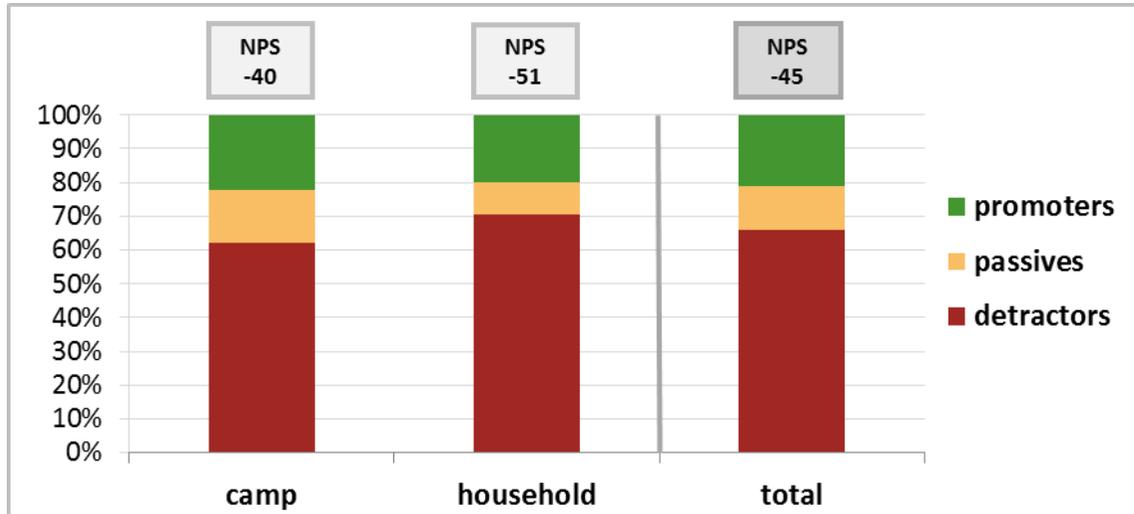
There is some differentiation among age groups, with older people least negative people from 35 to 54 years old most negative. Students and people who have completed higher education feel least listened to (NPS: -52 and -50). Entrepreneurs and job seekers also feel ignored (NPS of -55 and -49, respectively).

Of note:

Some 35% of respondents say they don’t get any support from the government - or that the government considers their problems but does not resolve many of them. Some 17% say that they have received help in the form of accommodation, welfare payments or provisions.



Question 6 – I feel that my conditions have improved in the past two months.



IDPs do not consider that their situation has improved much in the last two months. Scores across all demographic groups are negative. People living in the private accommodation are slightly more negative than people living in collective centres or camps.

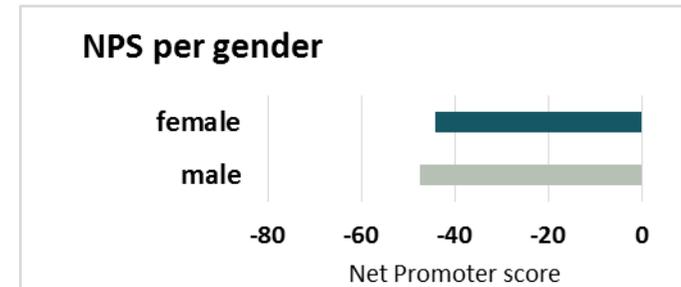
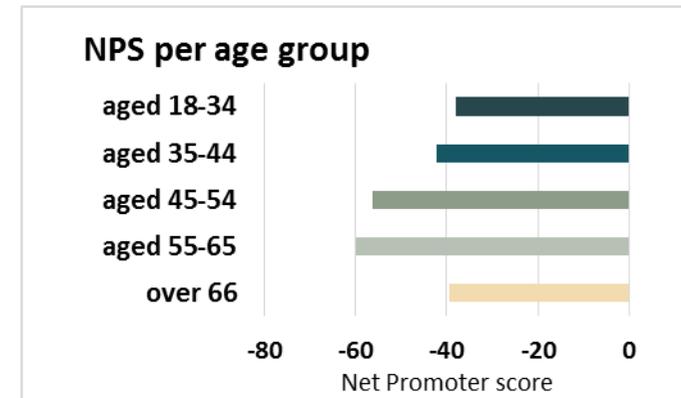
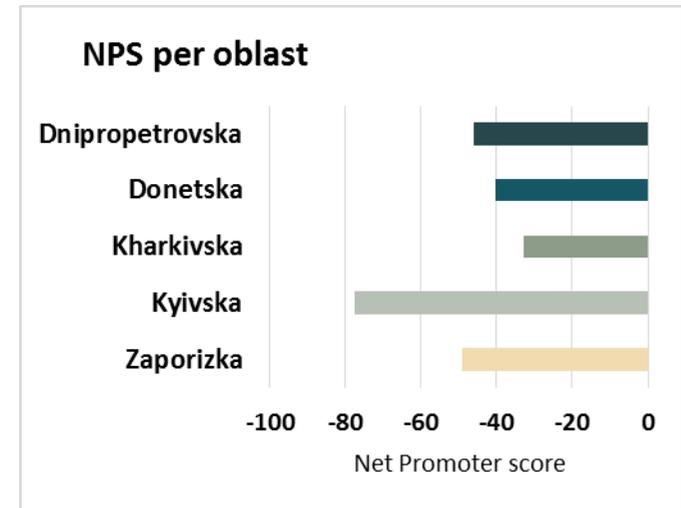
Respondents in the oblast of Kyivska are extremely negative, with an NP score of -78.

The highest levels of dissatisfaction are among people aged 35-65 years.

Of note is that people who do NOT want to go back to where they came from are most negative (NPS: -57).

Of note:

Rising prices are cited as a major concern.



3. Background and methodology

This report analyses data on the perceptions of people forced to leave their homes in Crimea, Donetsk and Luhansk who are now living in the oblasts of Dnipropetrovska, Donetska, Zaporizka, Kyivska and Kharkivska. It is the second of two surveys intended to inform the development and implementation of the government’s IDP communication strategy. The first round took place in early December 2014. The questions were formulated in consultation with the Prime Minister’s office, the Office of the Ombudsman and other departments. Draft questions were then tested in a focus group.

Data collection for round 2 took place between February 26 and March 4, 2015. It covered a sample of 400 displaced persons of which 50% are living in collective shelters or camps and 50% are accommodated in private households. The survey was conducted using face-to-face interviews.

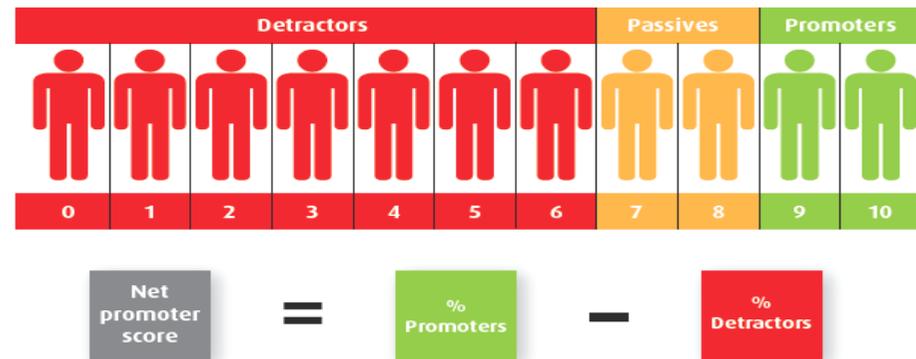
Net Promoter Score

In analysing the data from this survey we have used Net Promoter Analysis (NPA)¹. It distinguishes between three constituent profiles: promoters, passives and detractors. This analysis provides the basis for the development of distinct strategies to work with each of the constituent profiles.

Promoters are people who rate a question as 9 and 10 on a 0-10 point scale. These are the champions. They are likely to be wholehearted and active enthusiasts and to recommend consistently the government’s IDP strategy to their friends and colleagues.

Passives are those who give ratings of 7 and 8. They do not have major concerns, but they are not particularly enthusiastic about the program. However, with the right incentives, they could well become *Promoters*.

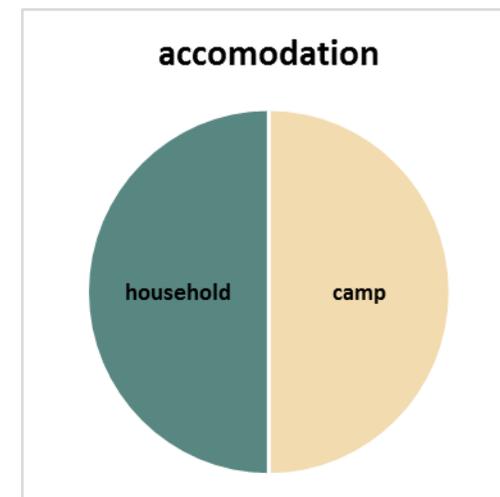
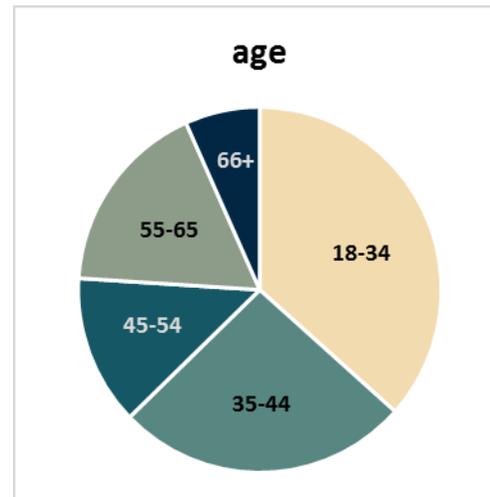
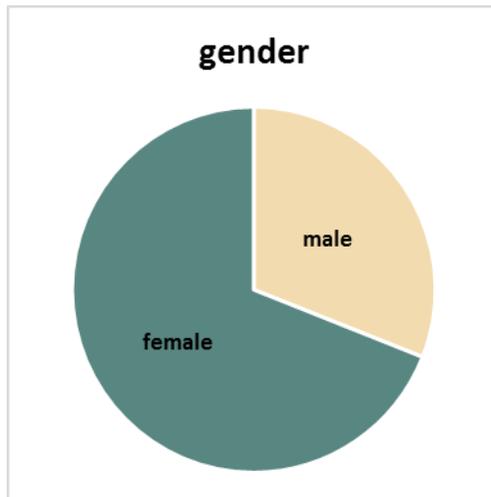
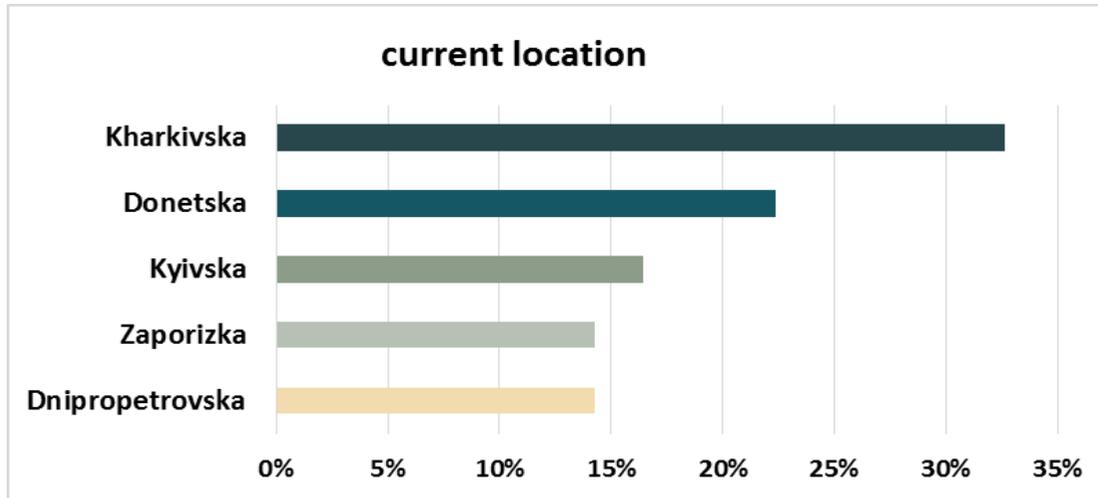
Detractors are people who rate the questions from 0-6. They have fairly negative perceptions on the question and their views are likely to negatively affect the success of the IDP programme.



The Net Promoter Score (NPS) is calculated by subtracting the detractors from the promoters while ignoring the passives. Successful programmes or organizations generally have a high NPS but it is not uncommon to have a negative NPS.

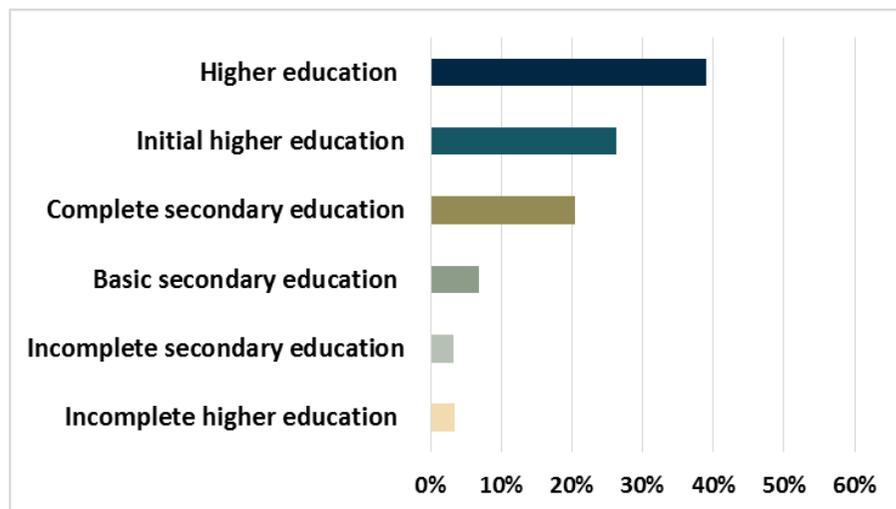
¹ 'Net Promoter' is a registered trademark of Fred Reichheld, Bain & Company and Satmetrix. For more see: www.netpromotersystem.com, as well as the open source net promoter community at www.netpromoter.com.

4. Sample size and demographics in round 2



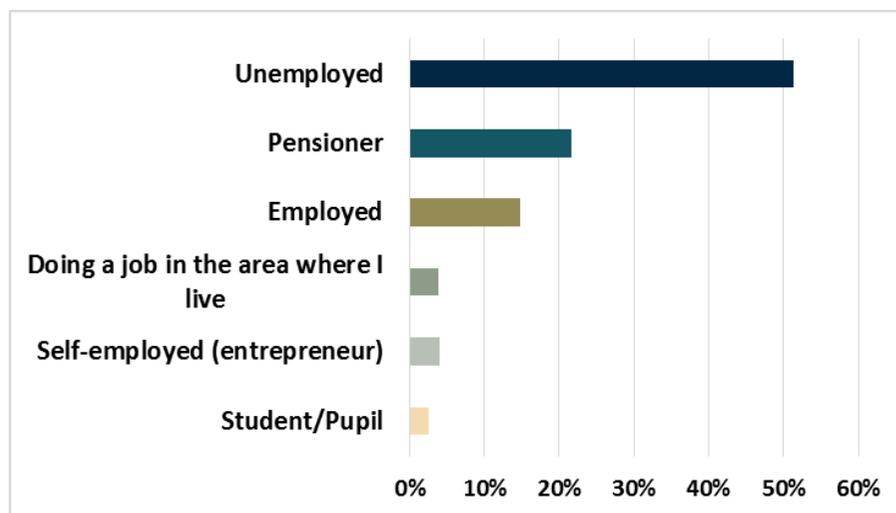
Financial status:

People accommodated in private households are under higher financial stress than people living in collective shelters. Some 70% of the first group are forced to economize on food; 53% of the latter. All respondents say are financially stressed, with some 89% saying they must save to cover their needs for food, clothes and shoes.



Education:

Most of the people in the survey are quite well educated. Almost 40% have graduated with a bachelor's, specialist or master's degree. IDPs in Kyivska have the highest level of educational attainment, with 57% holding a degree of some kind. The graph (left) describes respondents' maximum level of educational achievement.



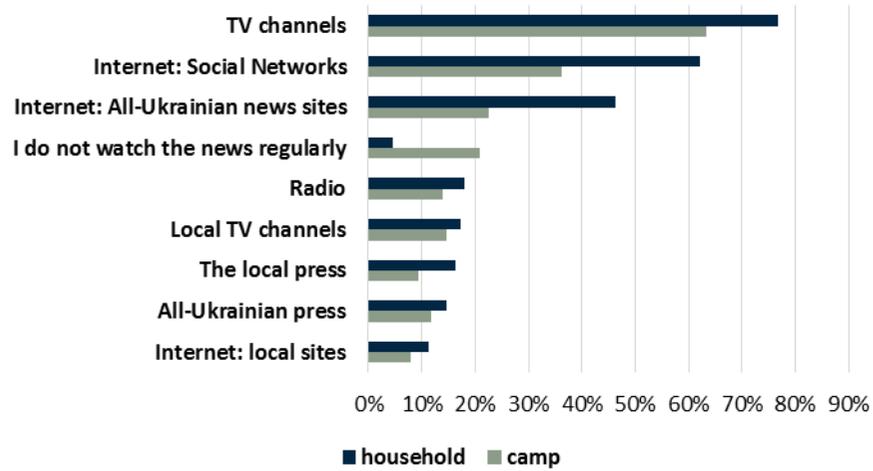
Occupation:

Overall 52% of all respondents are unemployed. Some people in this category are looking for work; others are not. Homemakers and people on maternity leave are also in this category.

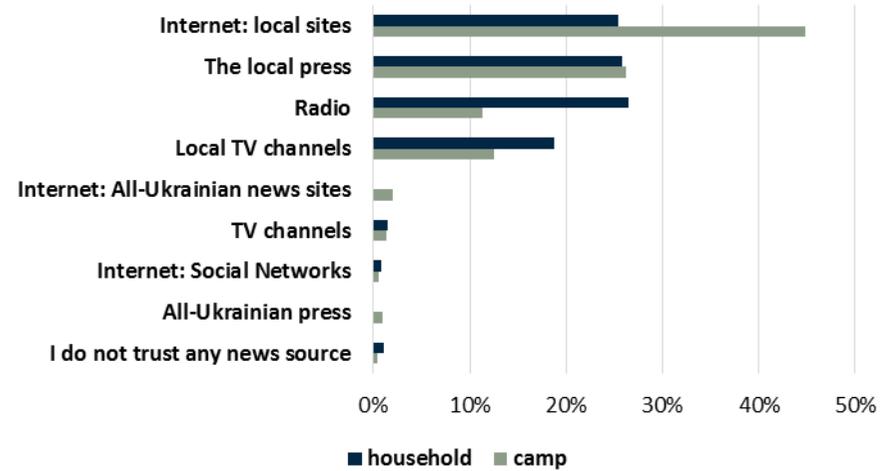
Those that have jobs mostly work in the private sector (64%). Highest levels of reported employment are in Dnipropetrovska but overall the proportion of people saying they are unemployed has risen. Some 37% of the respondents say they have a job against 56% in the last round.

5. ANNEX

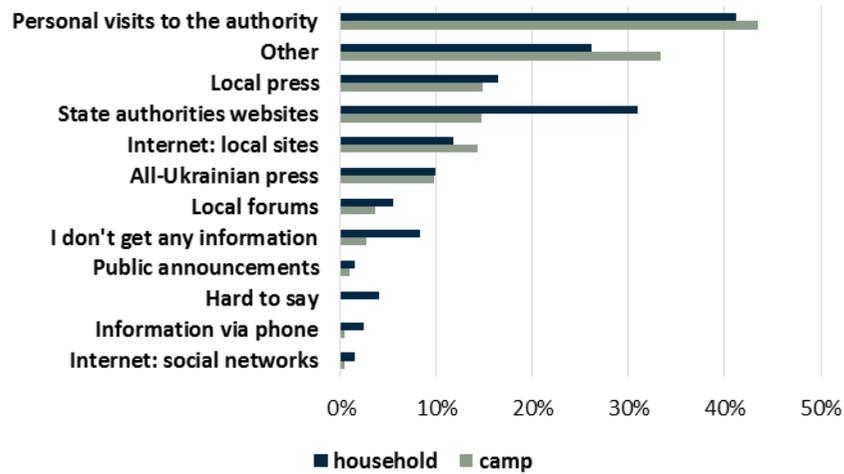
Which news source do you use at least once a week?



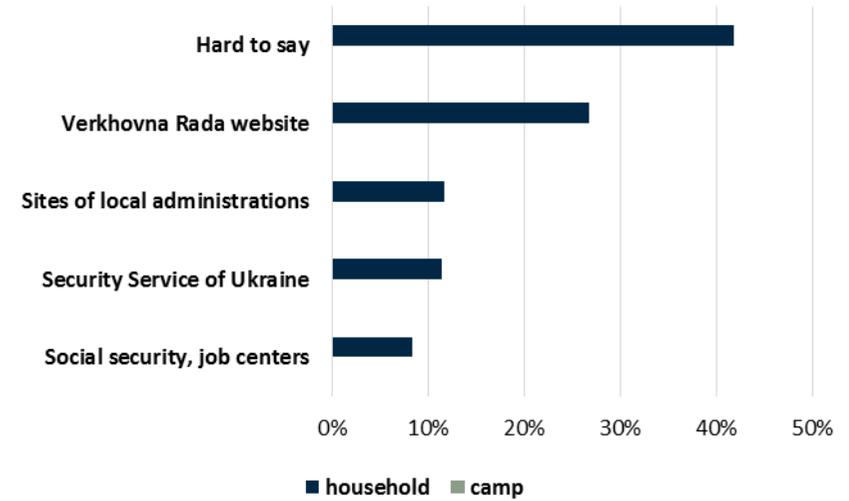
Which sources of news do you trust the most?



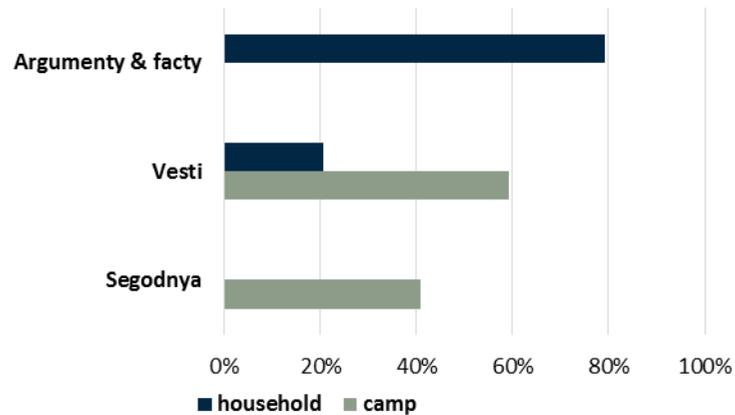
Where do you get information about state services?



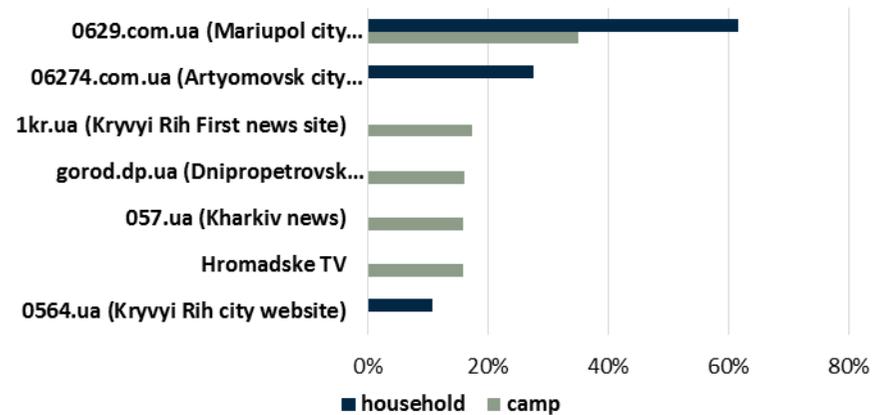
Which websites do you use for information about state services?



What is your preferred all-Ukrainian media?



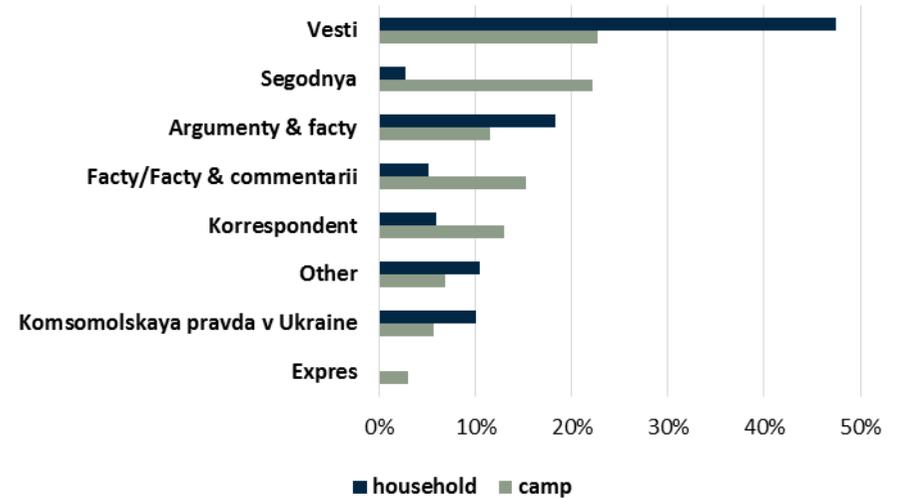
Which local sites on the internet do you visit?



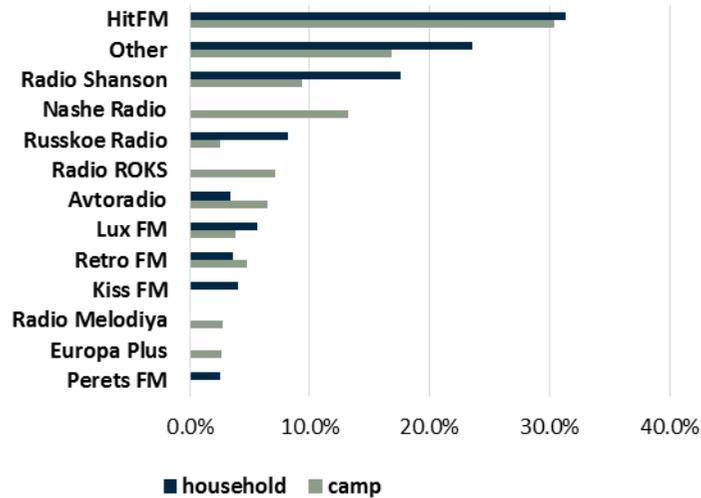
On which channel do you watch the news most often?



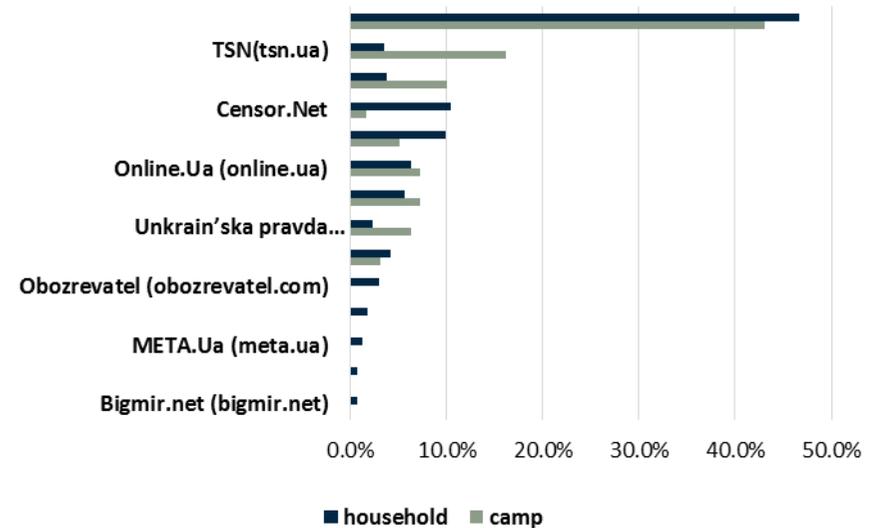
In which newspaper or magazine do you most often read news?



Which radio station do you listen to most often?



On which news website do you most often read news?



On what social network do you read news most frequently?

