# ADAPTATION STRATEGIES FOR CULTURE AND CREATIVE INDUSTRIES DURING THE RUSSO-UKRAINIAN WAR

## Wave 2

ANALYTICAL REPORT

ON THE RESULTS OF THE UCF'S RESEARCH FINDINGS

UKRAINIAN
CULTURAL
FOUNDATION

# INTRODUCTION

The UCF, as a leading state-funded institution, has been actively engaged in analytical work since the onset of the full-scale invasion. The main focus of the Foundation's research is the state of the cultural sphere of Ukraine in the context of the war. The results of UCF's research are actively used both in the practical activities of governmental and non-governmental organizations in the sphere of culture, and in the activities of the Foundation itself to improve its performance.

In the early summer of 2023, the Foundation conducted the second wave of research on adaptation strategies for culture and creative industries to wartime conditions. Wave 1 was conducted in November 2022 and its results have served as the basis for the development of programs for the 2023 grant season. The current study aims to analyze the dynamics of stable and problematic sectors of Ukrainian culture, identifying key factors of adaptability/non-adaptability of cultural organizations/institutions, which is important for further development of anti-crisis measures and the formulation of a future strategy for the restoration of Ukrainian culture and post-war reconstruction of Ukraine.

The questionnaire for the current survey has been slightly modified, including clarification of certain wording and addition of more options to answer specific questions. A special set of questions has been incorporated for cultural workers currently employed abroad. In this analytical note, we compare the results of the two waves of the survey. However, the data from Wave 1 of the survey are presented in a revised version, excluding the responses of those who were abroad. This approach enables a more accurate comparison of the responses from the respondents who are in Ukraine.

**Purpose of the survey:**

The purpose of the survey is to collect and analyze information on the adaptation of the Ukrainian cultural sphere and creative industries to exist in the context of Russia's armed aggression.

**Objectives of the survey:**

- to identify the key factors contributing to the successful adaptation of cultural organizations and creative industries to the conditions of war;
- to analyze changes in the level of adaptation of cultural organizations in comparison with the second half of 2022;
- to study the peculiarities of adaptation among cultural workers abroad.

**Data collection method:** online questionnaire.

**Sample population:** 570 respondents (cultural professionals). The margin of error (standard error) for the entire sample is ±3%.

**Timeframe of the survey:** data collection was carried out from June 13, 2023 to June 30, 2023.

**Evaluation of the state of the cultural sphere in Ukraine**

The results of the survey indicate that approximately half of the respondents assess the current state of Ukrainian culture and creative industries as bad, and only 6,7% as good (Diagram 1). Employees of non-governmental organizations (62,8%) and individual entrepreneurs (60%) tend to be more critical in their assessment of the state of culture, while among employees of state and municipal organizations the figures are 41,7% and 35,2%, respectively.

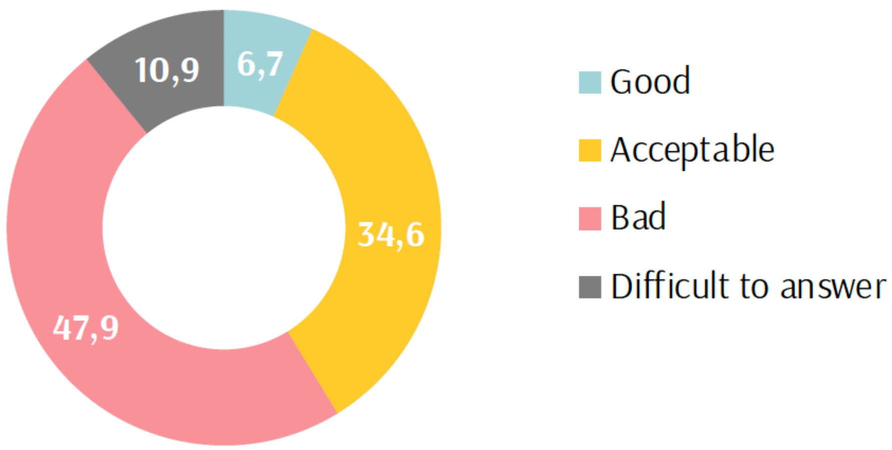


*Diagram 1 - How do you evaluate the general state of the cultural sphere and creative industries today?, %, N=570*

The indicators of the main obstacles to the development of Ukrainian culture, aside from the war, have changed slightly (within the statistical error) in comparison with the results of the previous wave of the survey. Similar to November 2022, respondents identify the main obstacles as the lack of stable state financial support – 75,4% and low salaries and demotivation of cultural personnel – 60,9% (Diagram 2). The shortage of qualified staff has increased by more than 9% in the last six months. The loss of qualified and motivated cultural workers is already a significant problem in the sector and it is likely to become even more acute in the future.

The answers of the respondents demonstrate that more than a quarter of them consider the low level of public interest in cultural and artistic events as a problem in the development of Ukrainian culture. However, compared to the previous survey wave, the share of respondents mentioning the problem of population's limited access to cultural recreation has decreased. As a result, the situation with the general availability of cultural services is better compared to the situation in the autumn of 2022.

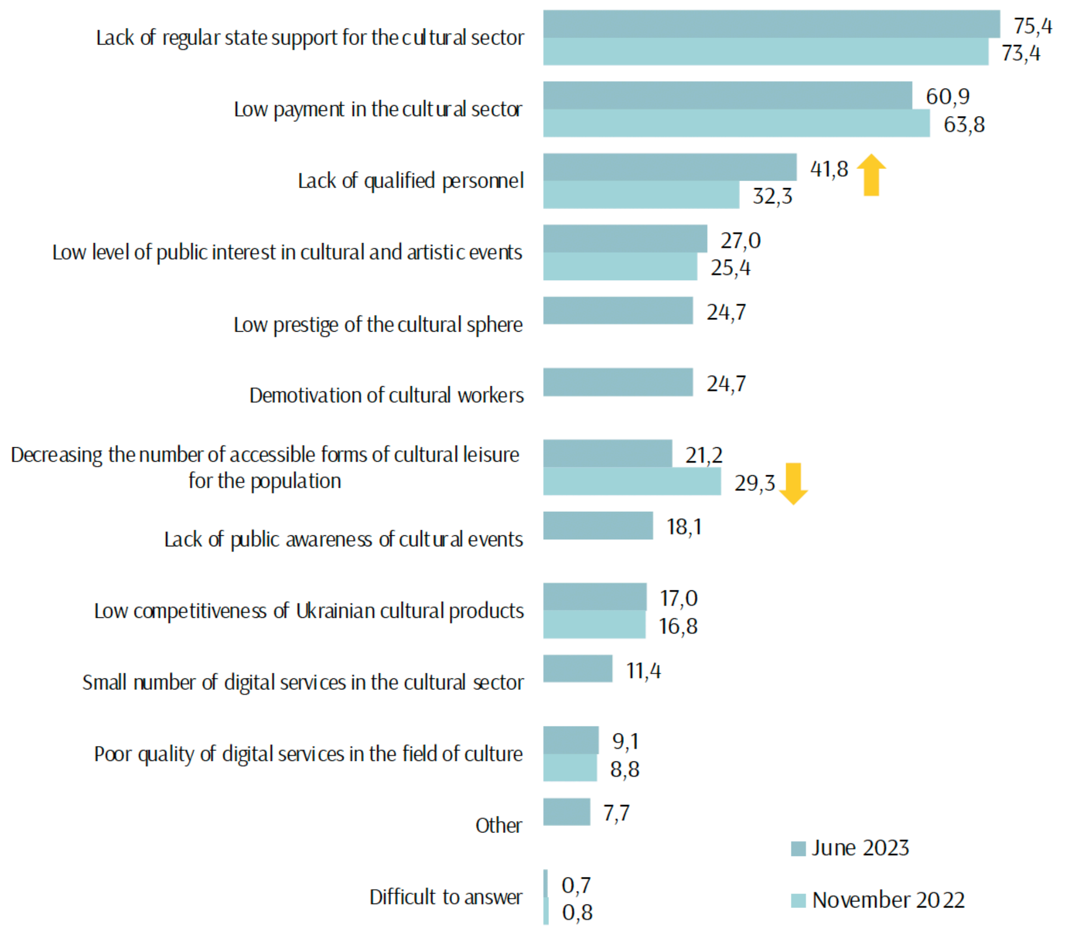


*Diagram 2 - In your opinion, what is the biggest obstacle to the development of Ukrainian culture besides the war?, %, N=570*

Regarding the allocation of funds for the cultural development of the territories/regions destroyed as a result of the war, the vast majority of respondents (79,1%) expressed that a separate program should be created for these territories. The results of this question do not differ significantly from those of November 2022 (Diagram 3).

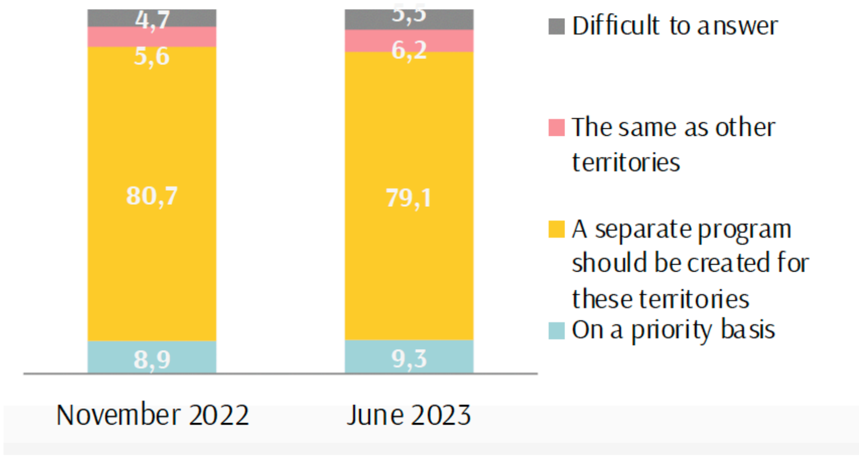


*Diagram 3 - How should the funds for cultural development in the areas/regions that have been destroyed as a result of the war be distributed?, %, N=570*

## The support of culture during the war

The level of support received by the cultural sphere during the war is generally rated low by the respondents. According to respondents, international organizations (38,6%), NGOs (29,8%) and volunteers (29,1%) provided the most tangible support to the cultural sphere during the war. The least tangible support came from central government, business and local authorities (Diagram 4).

Support from international organizations during the war was most highly valued by representatives of the visual and audiovisual arts. Professionals in the cultural heritage and literature and publishing sectors most often mention support from NGOs and volunteers. Representatives of the audiovisual arts rate support from business and central authorities the lowest. On the other hand, representatives of the visual arts sector rate support from local and central authorities the lowest (Diagram 5).

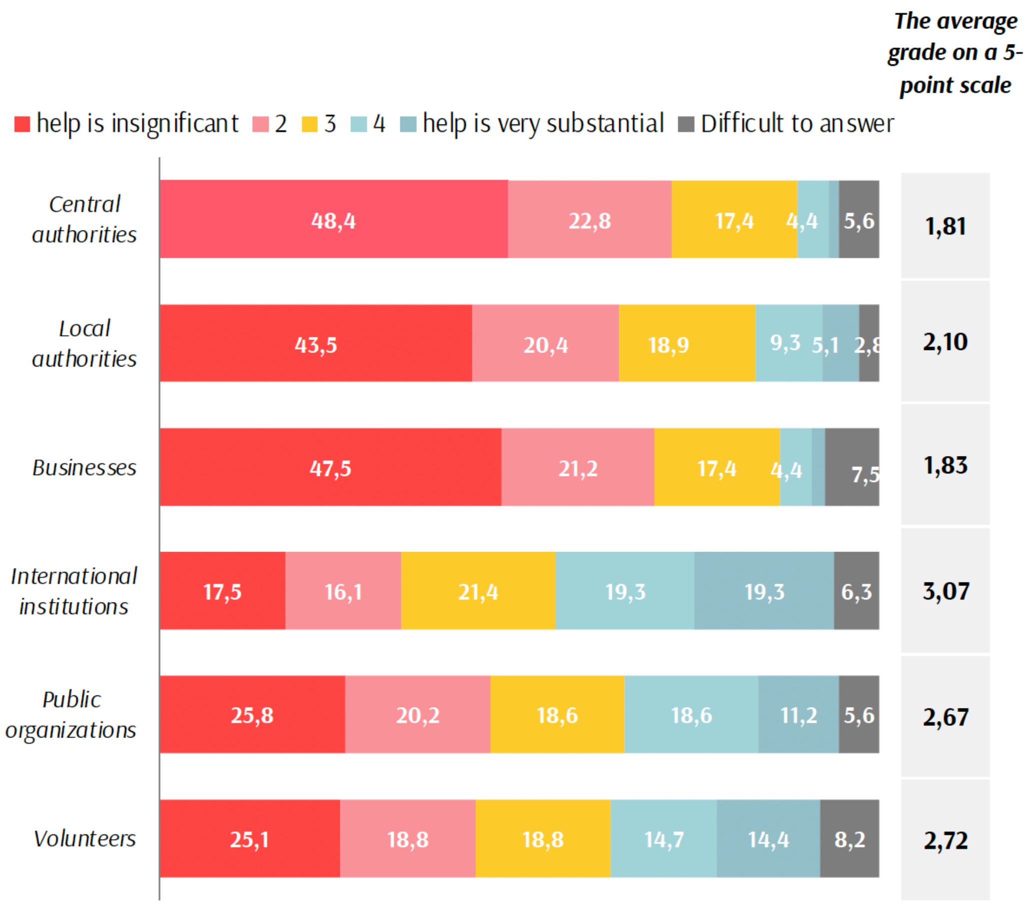


*Diagram 4 - How would you rate the support for culture and creative industries during the war from:, %, N=570*

| Visual art | Audio art | Audiovisual art | Literature and publishing | Performing and stage arts | Cultural heritage | Cultural and creative industries |
|---|---|---|---|---|---|---|
| 1,59 | 1,53 | 1,82 | 2,02 | 1,74 | 1,93 | 1,68 |
| 1,62 | 2,35 | 1,82 | 2,50 | 2,21 | 2,29 | 2,00 |
| 2,03 | 1,67 | 1,84 | 1,76 | 1,68 | 1,78 | 1,96 |
| 3,19 | 2,33 | 3,19 | 3,11 | 2,85 | 3,11 | 2,82 |
| 2,65 | 2,40 | 2,55 | 2,87 | 2,41 | 2,76 | 2,63 |
| 2,39 | 2,16 | 2,56 | 2,78 | 2,50 | 2,98 | 2,50 |

*Diagram 5 - Evaluation of support for the culture by sector (average score on a 5-point scale, N=570)*

# RESULTS OF A SURVEY AMONG CULTURAL PROFESSIONALS BASED IN UKRAINE

## Occupation of respondents

The share of respondents continuing to work in the cultural and creative industries has increased by almost 10% compared to November 2022 (Diagram 6). The most favorable job situation is observed for the respondents from the audiovisual arts: 100% of them continue to work in the cultural sphere, as well as for those from the literary and publishing sphere – 91,5% and the cultural heritage sphere – 88,9%. Regarding the organizational and legal form, the representatives of municipal organizations changed or lost their jobs less often than others. Another contributing factor to keeping a job in the sphere of culture was staying in the same place after February 24th or temporarily relocating and returning (Diagram 7).

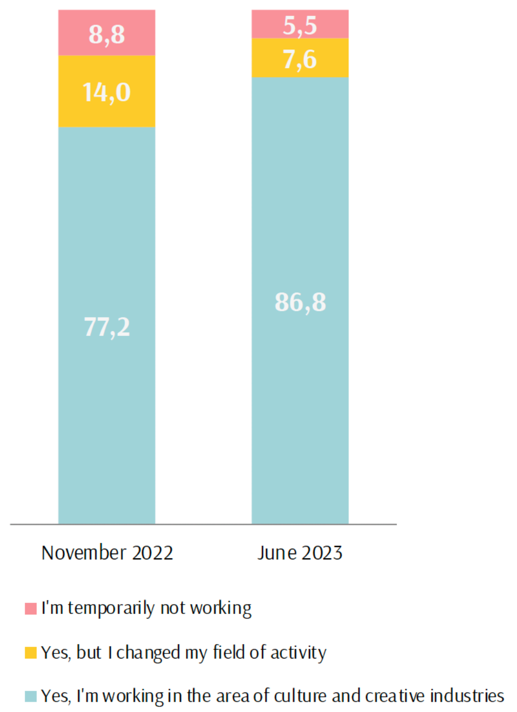


*Diagram 6 - Are you currently working?, %, N=523*

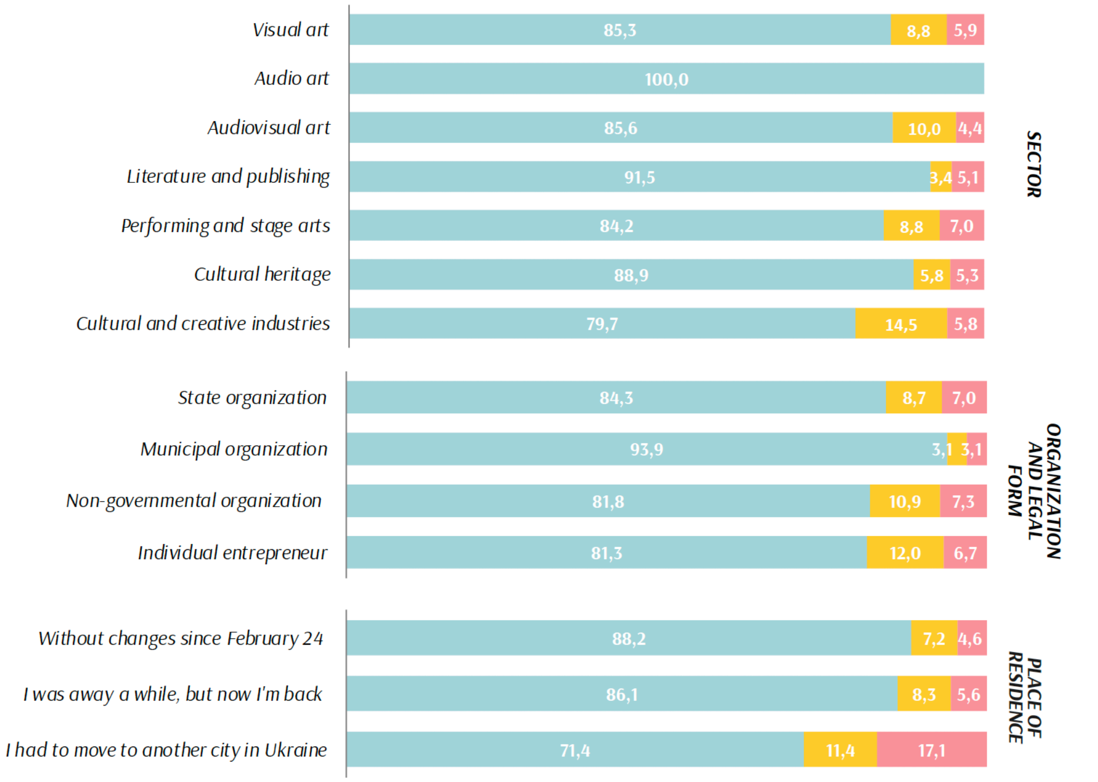


*Diagram 7 - Employment situation by group, %, N=523*

## Situation of the organization in the context of war

There is a slight improvement in the assessment of the situation in the cultural organizations where the respondents work. In general, 62,2% of respondents assess the situation positively (57,2% in November 2022), and 29,3% negatively (33,3% in November 2022) ( Diagram 8).

Representatives of literature and publishing (74,1%) and cultural heritage (70,8%) assess the situation in their organizations most positively. The greatest difficulties are observed in the organizations of the audiovisual arts sector, where 45,5% assess the situation generally negatively, and in cultural and creative industries with 43,6% expressing a negative assessment. Employees of state and municipal organizations are more likely to assess the overall situation of their institutions positively – 66% and 67,9%, respectively. In contrast, this figure is lower among employees of non-governmental organizations and individual entrepreneurs ( Diagram 9).

In general, a clear pattern emerges: respondents who hold a generally positive view of the situation in their organization are more likely to have a good or satisfactory view of the overall state of culture (56,4%). Conversely, poor assessment of culture prevails (65,4%) when the situation in the organization is generally negative (chart 10).

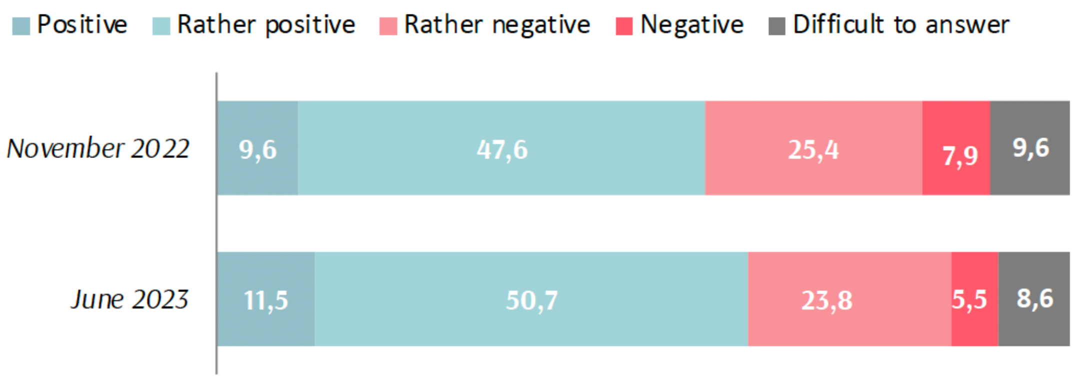


*Diagram 8 – How would you generally rate the situation in your organization today?, % (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

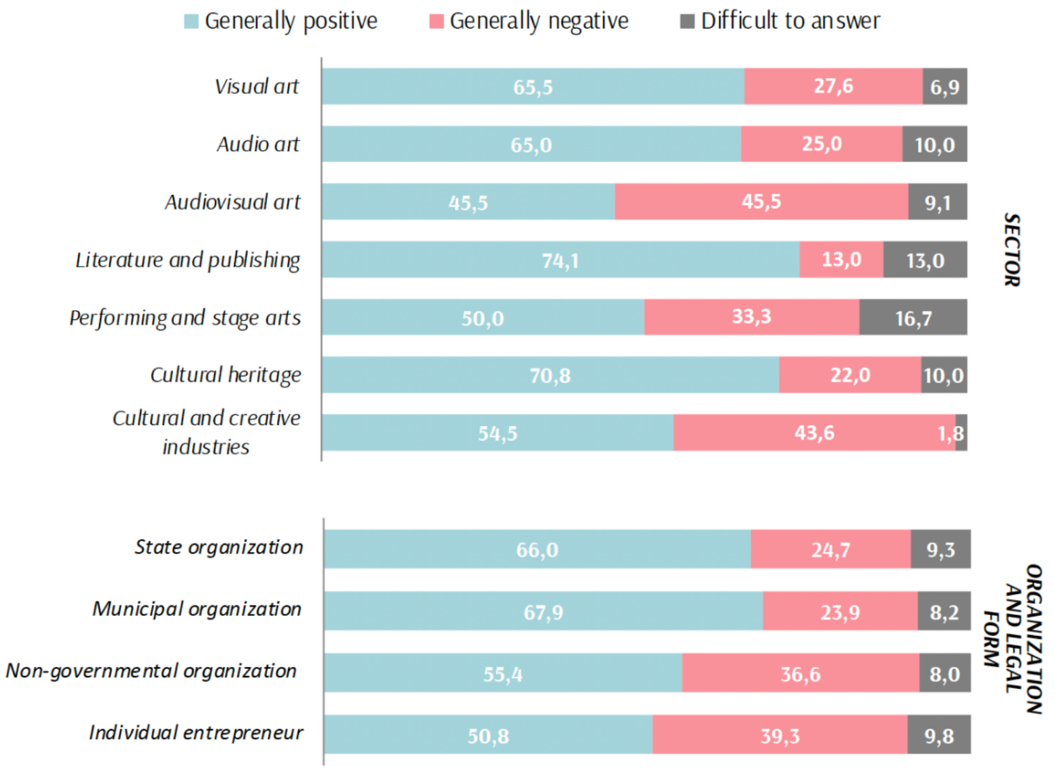


*Diagram 9 – Evaluation of the situation of the organization by groups, % (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

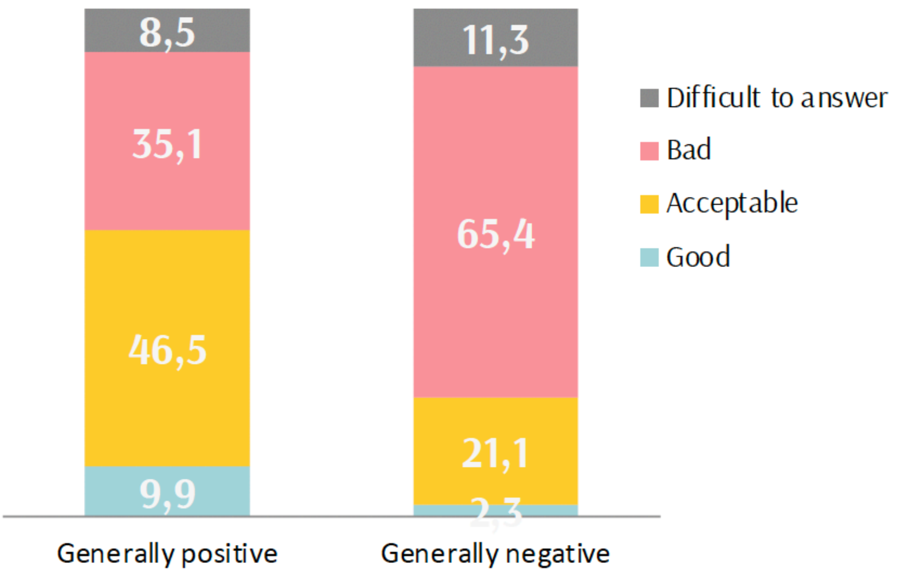


*Diagram 10 – Evaluation of the state of the culture based on the assessment of the organization's situation, % (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

The majority of respondents rate the overall situation of their organization as unchanged over the past six months (45,8%). Almost the same number of respondents state that the situation has improved (24,9%) or worsened (22,2%) (Diagram 11). Compared to the results of the previous survey conducted in November 2022, there is a tendency to assess the situation of the organization as more stable. The current survey indicates that the representatives of the cultural heritage sector (31%) and the literature and publishing sector (25,9%) view the situation in their organization most positively. On the contrary, specialists in the audiovisual (33,8%), visual (31%), performing and stage arts (29,2%) sectors tend to report a deterioration (Diagram 12).

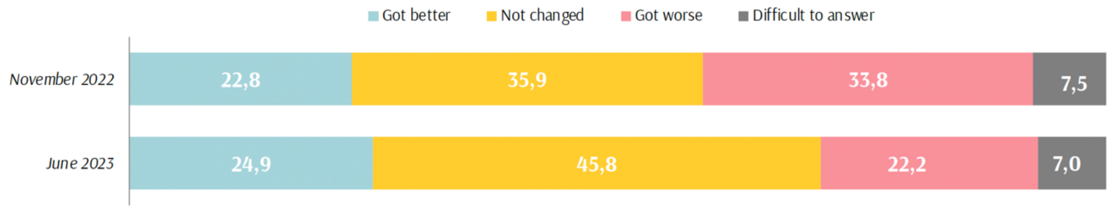


*Diagram 11 - How has the general situation of your organization changed in the first half of 2023 compared to the second half of 2022?, % (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

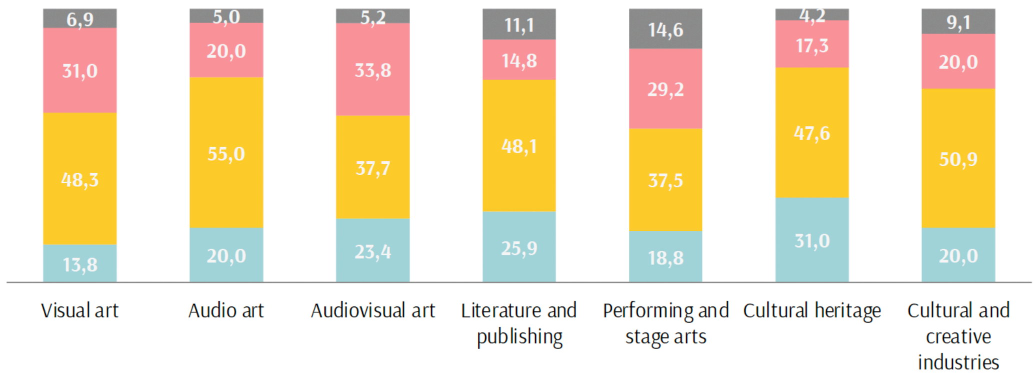


*Diagram 12 - Changes in the situation of the organization by sectors, % (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

The results of Wave 2 of the survey indicated a consistently high level of assessment of the adaptability of cultural organizations to the conditions of war. In November 2022, 81.4 percent of respondents rated themselves as generally adaptable, and by June 2023, this figure had increased to 84.3 percent (Diagram 13).

The index of adaptation was created to illustrate the groups of high and low levels of adaptability. The index is calculated in points as the difference between positive and negative ratings. The index value ranges from –100 to 100 points. The higher the index value, the more adaptable the organization is.

An analysis of the survey results reveals that the index of adaptability is quite high at 70 points. At the same time, this information indicates a 5 points increase in the level of adaptability in comparison with November (Diagram 14). The highest level of adaptation was demonstrated by the sectors of literature and publishing (89 points) and cultural heritage (82 points). In terms of legal form, state and municipal organizations (79 points each), indicating a higher level of adaptability. In contrast, audiovisual arts and cultural and creative industries, each scoring 51 points emerge as the least adapted sectors. Individual entrepreneurs demonstrate the lowest level of adaptation in terms of organizational and legal form reaching 54 points (Diagram 15).

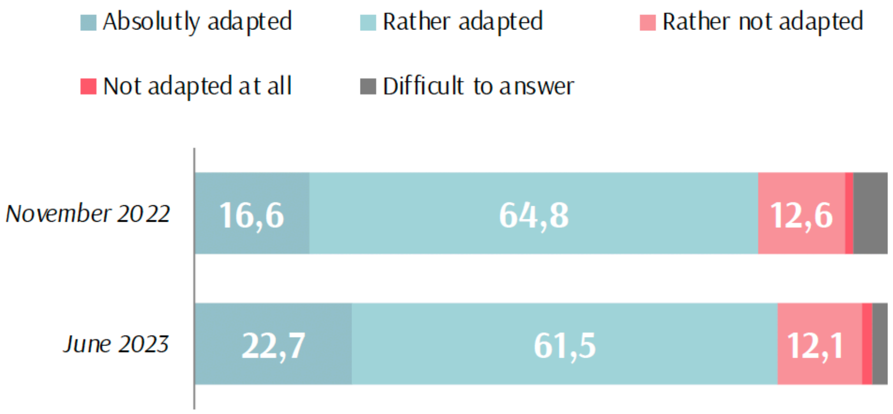


*Diagram 13 – How well has your organization adapted to the war?, % (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

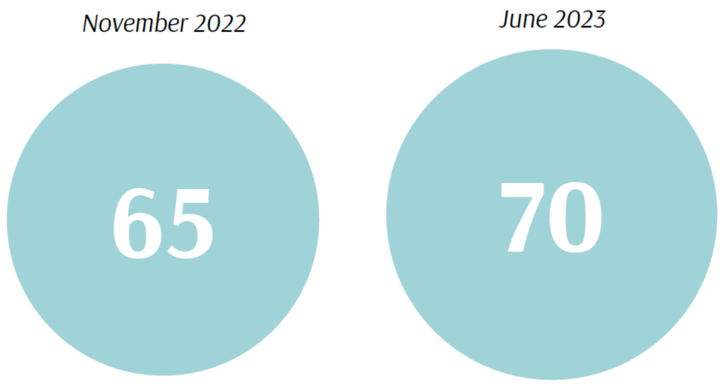


Diagram 14 – Index of adaptation

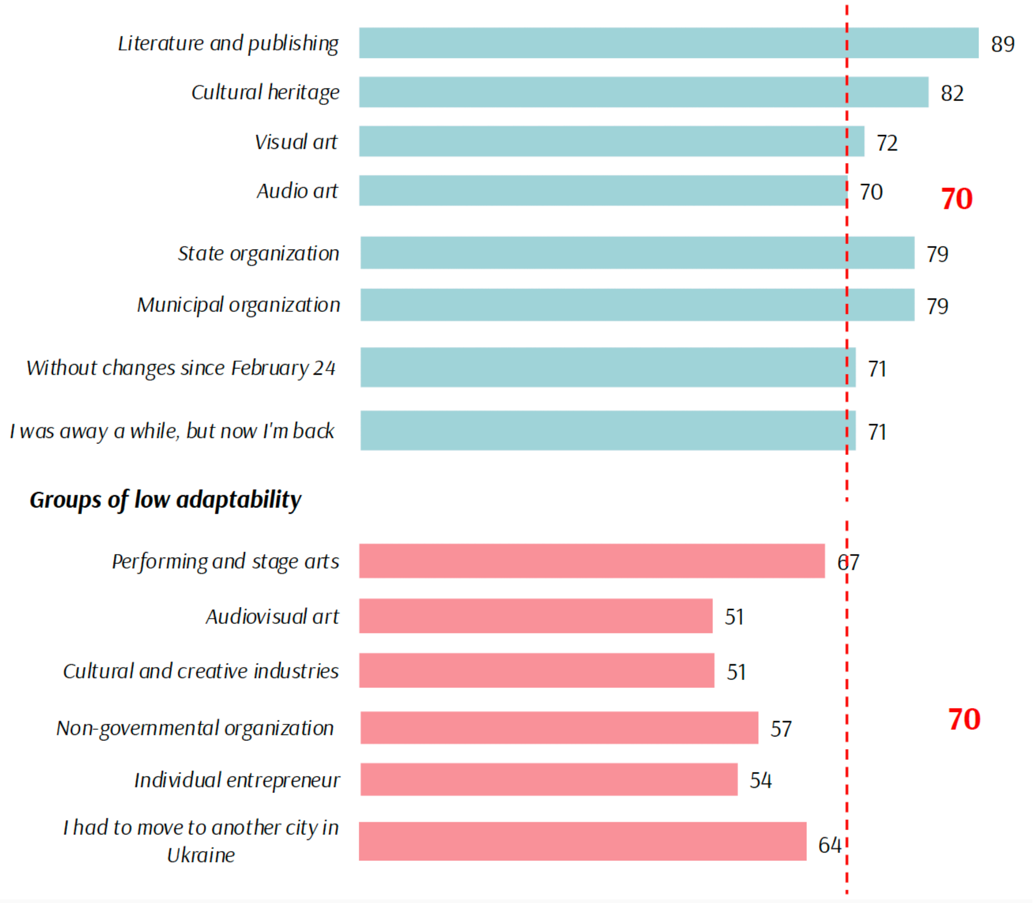


Diagram 15 - Groups of high and low levels of adaptability, by sector, legal form and change of residence, in points (among respondents who continue to work in the sphere of culture and creative industries, N=454)

## Motivators and demotivators of adaptation

The main measures taken by cultural institutions to support their activities during the war are identified as key factors contributing to adaptation to crisis conditions. Among them, the highest rates remain consistent with those of the previous period: cost optimization (60,8%), applying for grants, scholarships, etc. from international organizations (60,4%), and creating new products/services (57,9%) (Diagram 16).

It is noteworthy that those organizations that have not adapted to the wartime conditions demonstrate a significantly lower level of applying for grants (50%) and a lower percentage of developing new products/services (50%) compared to more adapted organizations, where these indicators constitute 62,3% and 59,9%, respectively. Thus, a hypothetical adaptation strategy can be described as a combination of cost saving while maintaining operations, creating new products and services, and taking active measures to attract additional sources of funding (grants, scholarships, etc.). It is worth noting that in the June 2023 survey, there was a decrease in the percentage of those opting for cost optimization. We assume that proactive adaptation measures prove more effective at this stage.

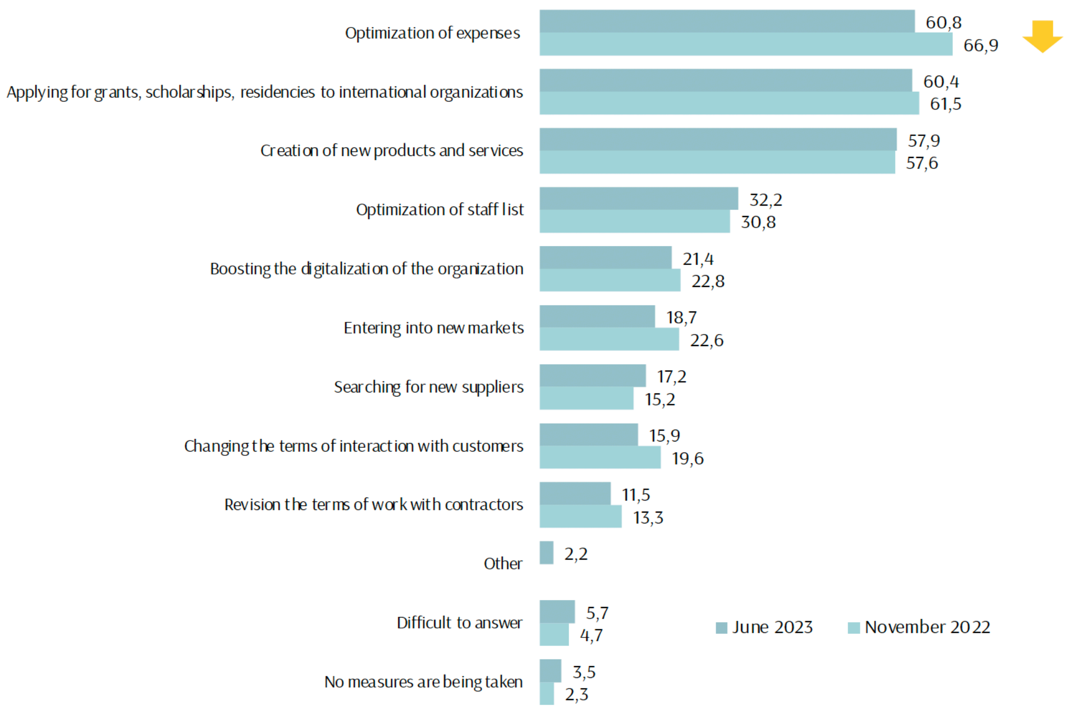


*Diagram 16 - Which measures have been taken to support the activities of your organization during the war?, % (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

Using the data from the previous diagram, we created a motivational matrix of adaptation that shows the difference between adapted and non-adapted respondents, contrasting the successful and unsuccessful adaptation strategies (Diagram 8).

**"Motivational core"** - goals with a great difference and high value significantly define the organization's adaptability to wartime activities.

**"Peripheral motives"** – motives with a large difference, but not high significance, which differentiate certain social groups and operate in certain situations.

**"Distinct but not differentiating motives"** – motives with high importance but low difference.

**"Insignificant motives"** are motives with low importance and low difference. The motivational matrix reveals that the core of the strategy for successful adaptation to the conditions of war is the creation of new cultural products while optimizing costs.

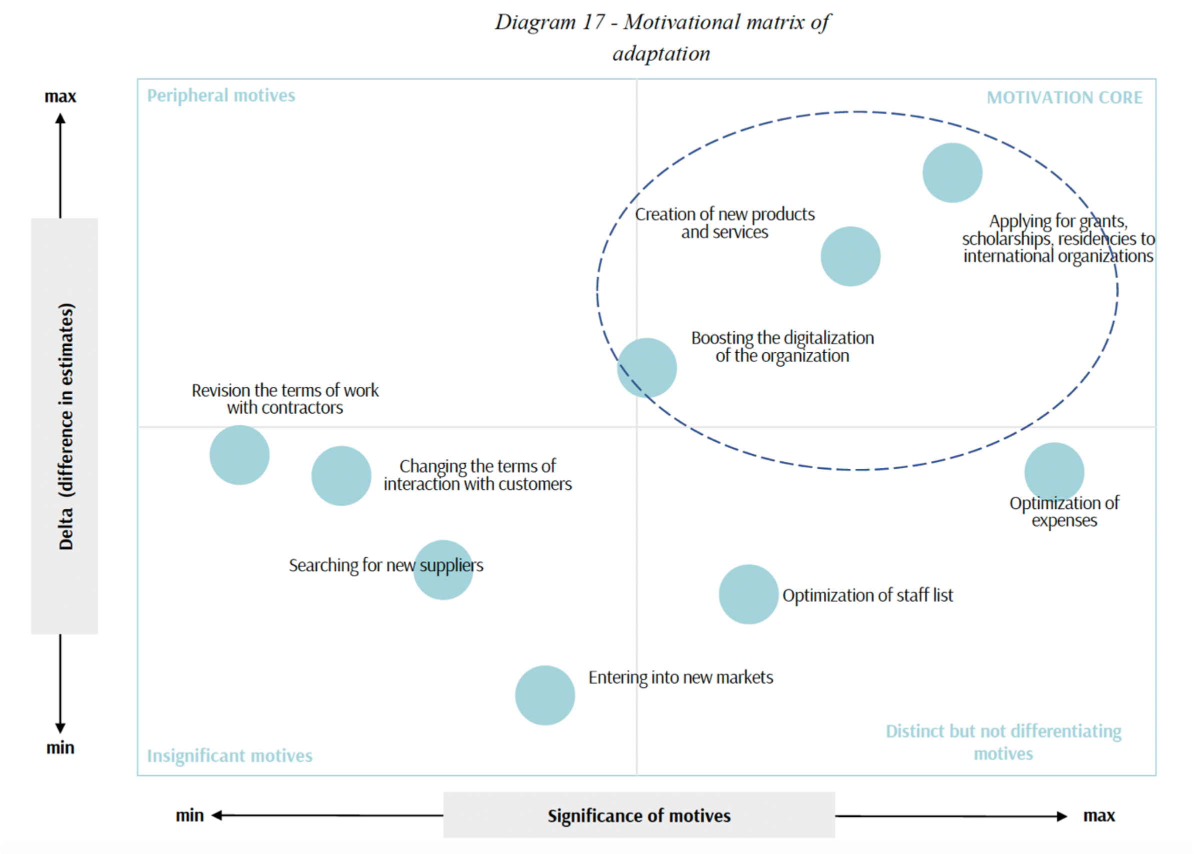


*Diagram 17 - Motivational matrix of adaptation (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

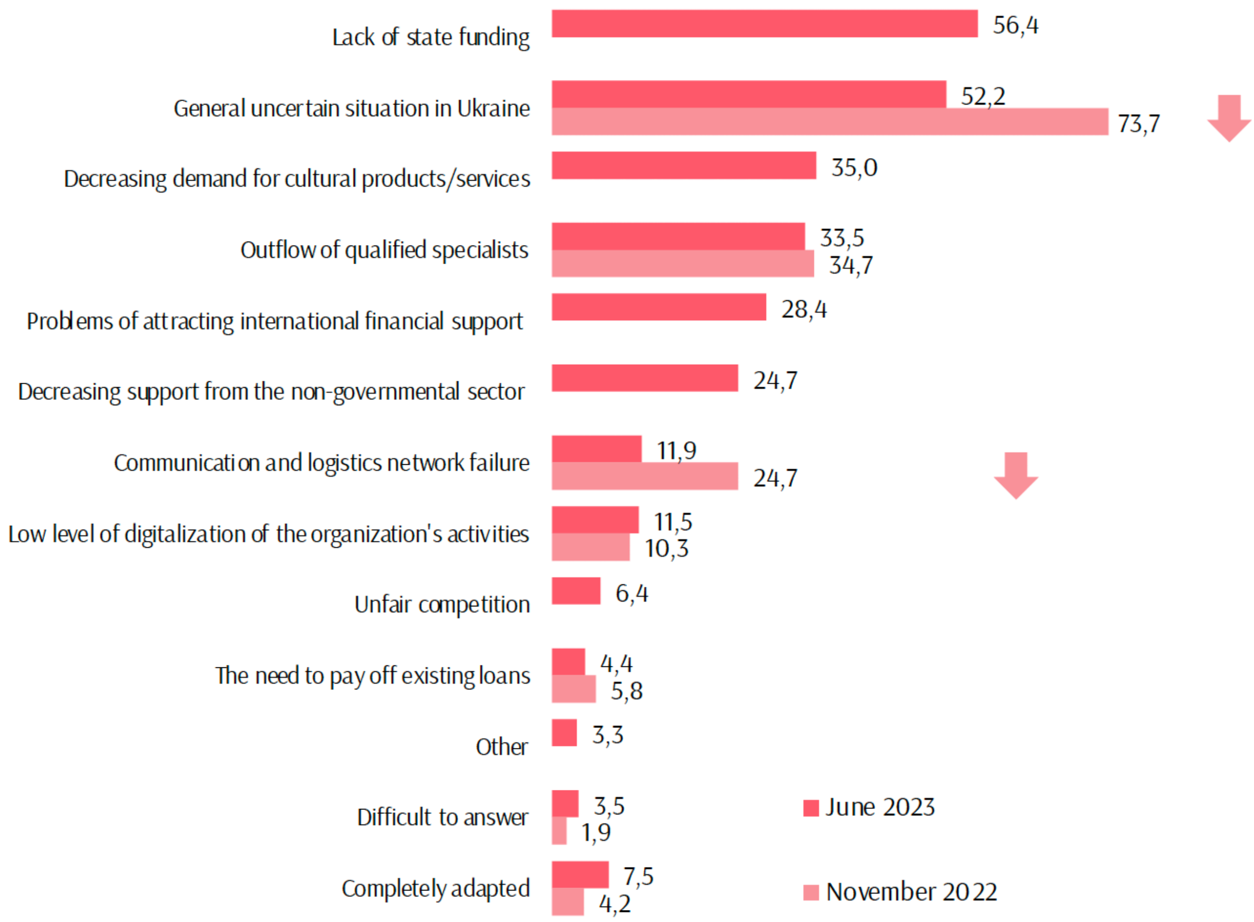


*Diagram 18 - What is the biggest obstacle for your institution to adapt to work during the war?,% (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

The constructed matrix of demotivating factors for cultural and creative industries organizations reveals that the list of adaptation obstacles has changed slightly compared to November 2022. The demotivating core includes a lack of public funding, decreased demand for cultural products/services, and issues in attracting international financial support (grants, sponsorships, etc.), whereas in the previous wave of the survey, only lack of public funding was included in the demotivating core (Diagram 19).

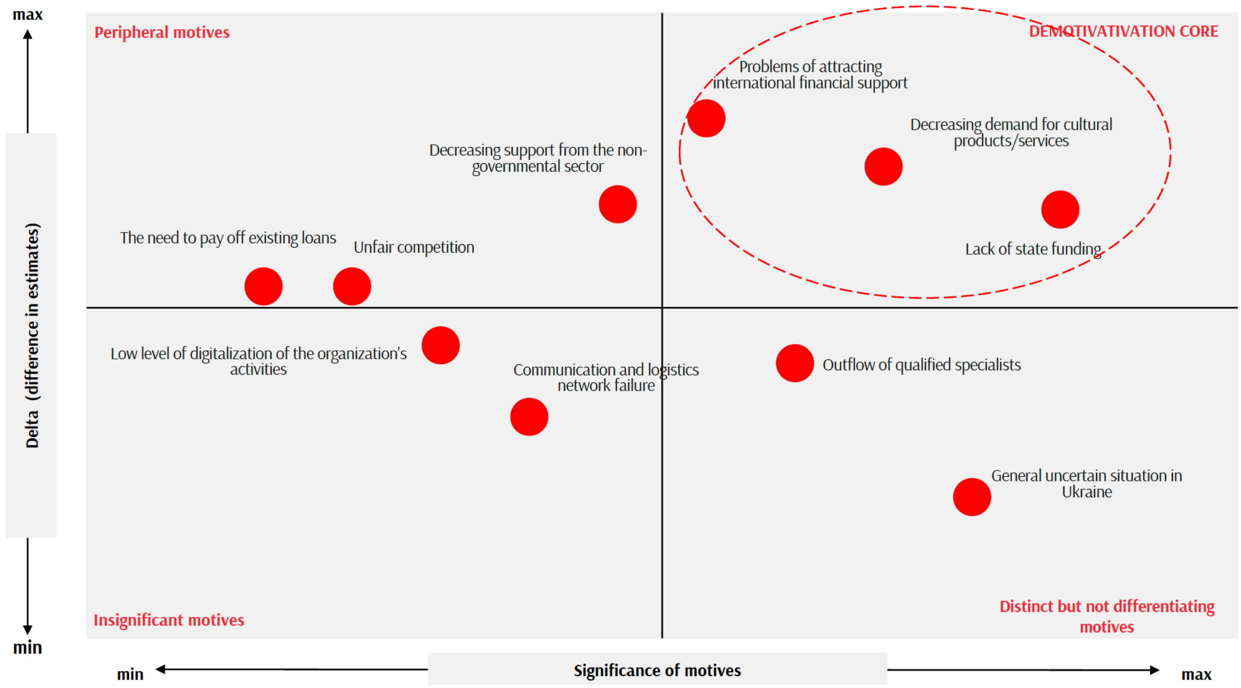


*Diagram 19 - Demotivational matrix of adaptability (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

The survey results indicate that a significant number of cultural and creative industries organizations still lack a crisis plan (31,9%). Moreover, this percentage has increased significantly compared to the survey conducted in November 2022 (Diagram 20). When combining those without a crisis plan and those in the process of developing one, the cumulative percentage reaches 59,4%. We assume that this concerning trend can be attributed to the active engagement of the most of the organizations in their current activities. This assertion is supported by comparative data from two survey waves. In November 2022, 49,5% and 39,8% of those without a crisis plan were focused on cost optimization and creating new products/services, respectively. In June 2023 these figures rose to 58,6% and 49%. Simultaneously, the availability of a crisis plan clearly affects adaptability to wartime conditions. Among organizations with a crisis plan, 91%exhibit overall adaptability, whereas among those without a plan, 75,9% demonstrate adaptability (Diagram 21).

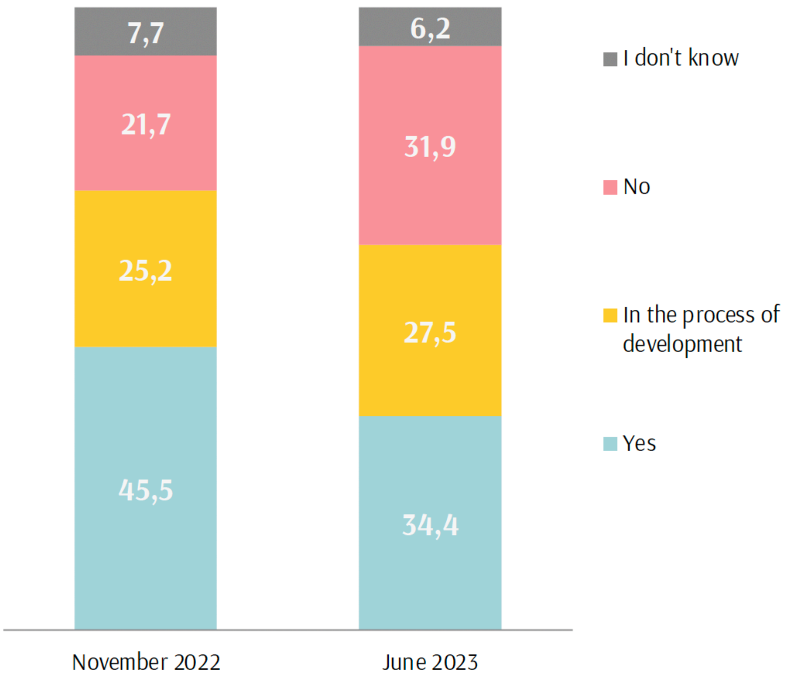


*Diagram 20 - Has your organization elaborated a crisis plan since the beginning of the war?, % (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

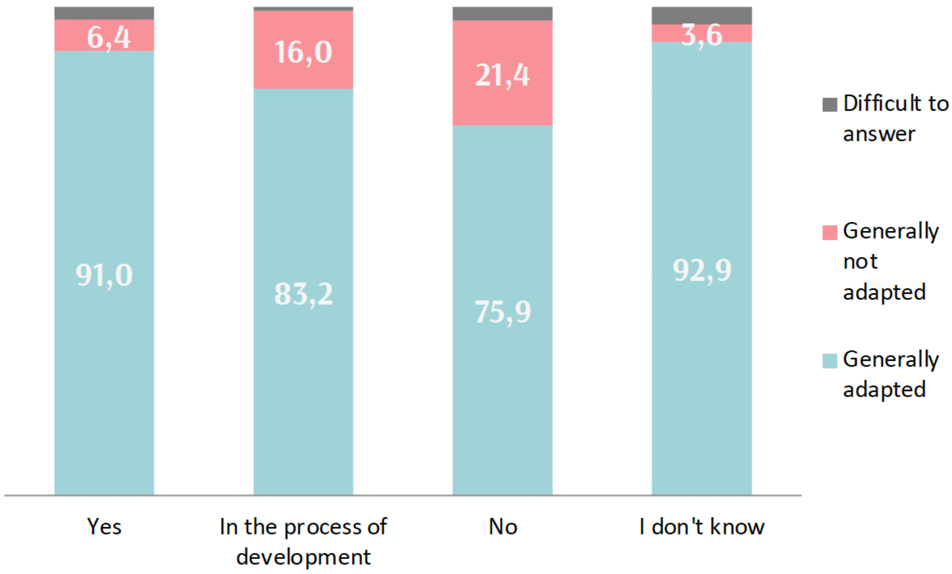


*Diagram 21 - Adaptability depending on the availability of a crisis plan, % (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

## Evaluation of the organization's perspectives

Almost half of respondents expect the situation in their organization to remain unchanged. However, there is a notable increase in the positive assessment of future prospects: in November 2022, 21,9% of respondents expected their company to expand, now this figure stands at 29,3%. At the same time, the percentage of those expressing pessimism about reducing their activities or closing their organization has decreased (Diagram 22). In the event of a deteriorating situation, the primary measure to be taken is cost-cutting, and these results generally align with the data of November 2022 (Diagram 23). Among those who are not adapted, the percentage of those anticipating closure of their organization in case of deterioration is considerably higher (30,6%). Instead, among those actively adapting, the main measure is cost-cutting, accounting for 34,3% (Diagram 24).

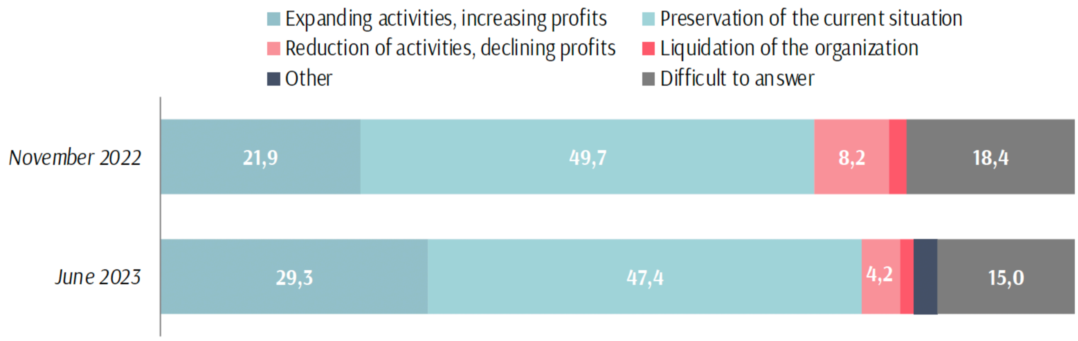


*Diagram 22 - How do you generally rate the perspectives of your organization?, % (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

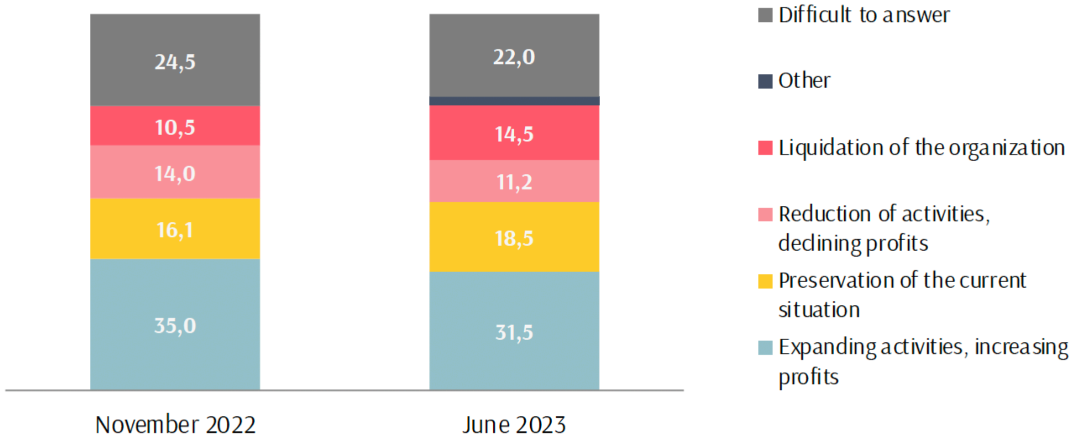

*Diagram 23- In your opinion, what measures can your organization take in case the situation worsens? % (among respondents who continue to work in the sphere of culture and creative industries, N=454*

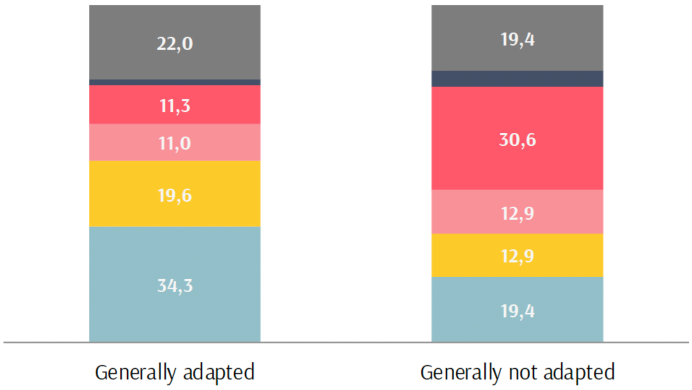


*Diagram 24 - Actions taken in case of getting worse in terms of adaptability, % (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

## Organization's involvement in cultural events

Respondents outline the active involvement of their organizations in various cultural events. The highest frequency and intensity is observed in events of local importance, and least in international events (Diagram 25). There is a correlation between the level of adaptation to the conditions of war and participation in various cultural events. For example, among those who participate in regional events, the level of adaptation is 87,7%, and among those who do not participate - 66,7% (Diagram 26).

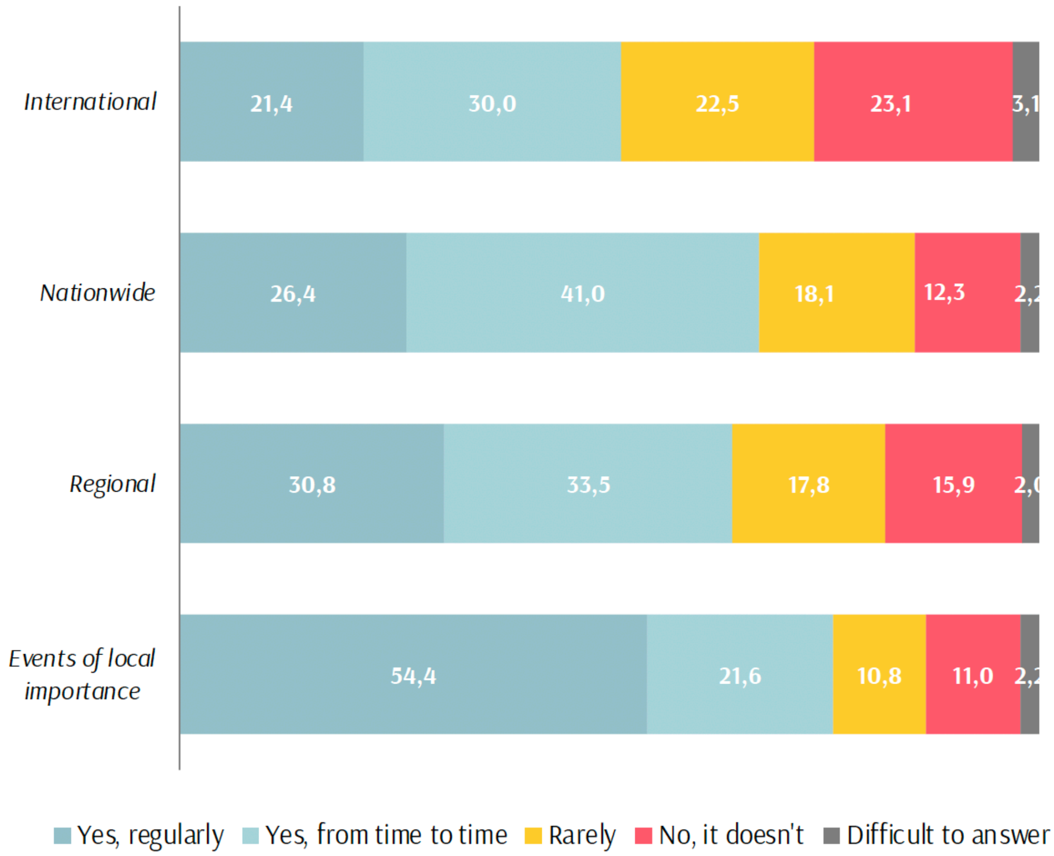


*Diagram 25 - Does your organization participate in the following cultural events?, % (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

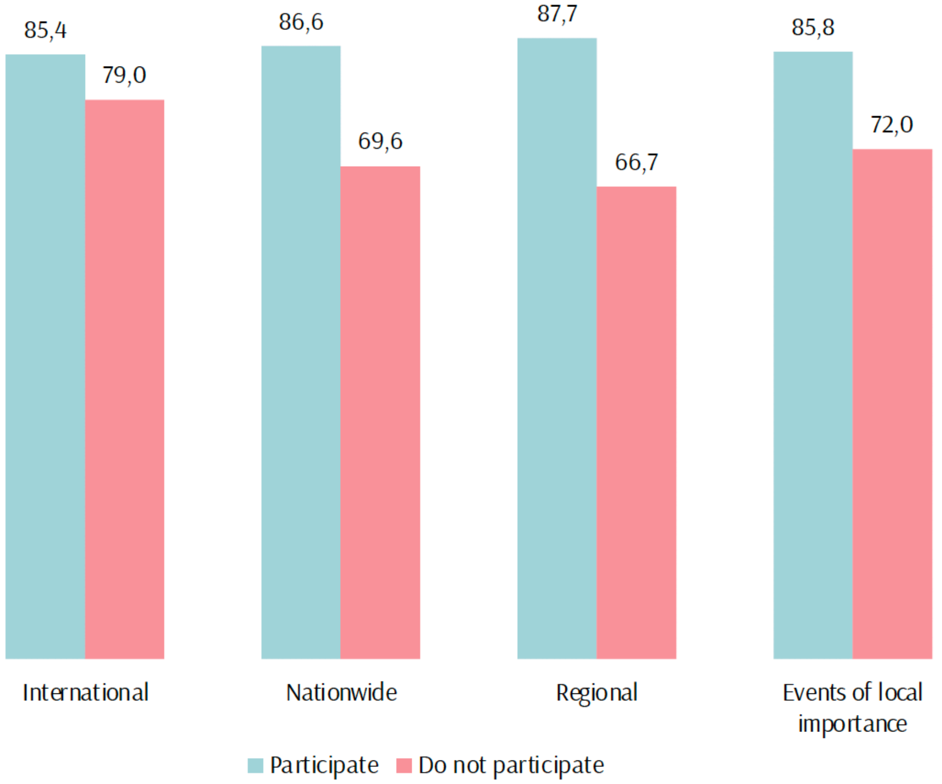


*Diagram 26 - Percentage of adapted organizations by participation in cultural events, % (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

## Evaluation of assistance and requests for government support

Respondents have indicated that they most frequently receive various types of assistance from international organizations (60,8%), local authorities (54,2%), and NGOs (54%). The least frequent source of support is the business community (28,9%) (Diagram 27). Financial support is more often provided by central and local governments, grants by international organizations, logistical support by local governments and volunteers, information by NGOs and educational support by NGOs, international organizations, and the central government. In summary, 89,6% of respondents indicated that their organizations received at least one type of support from at least one of the support providers.

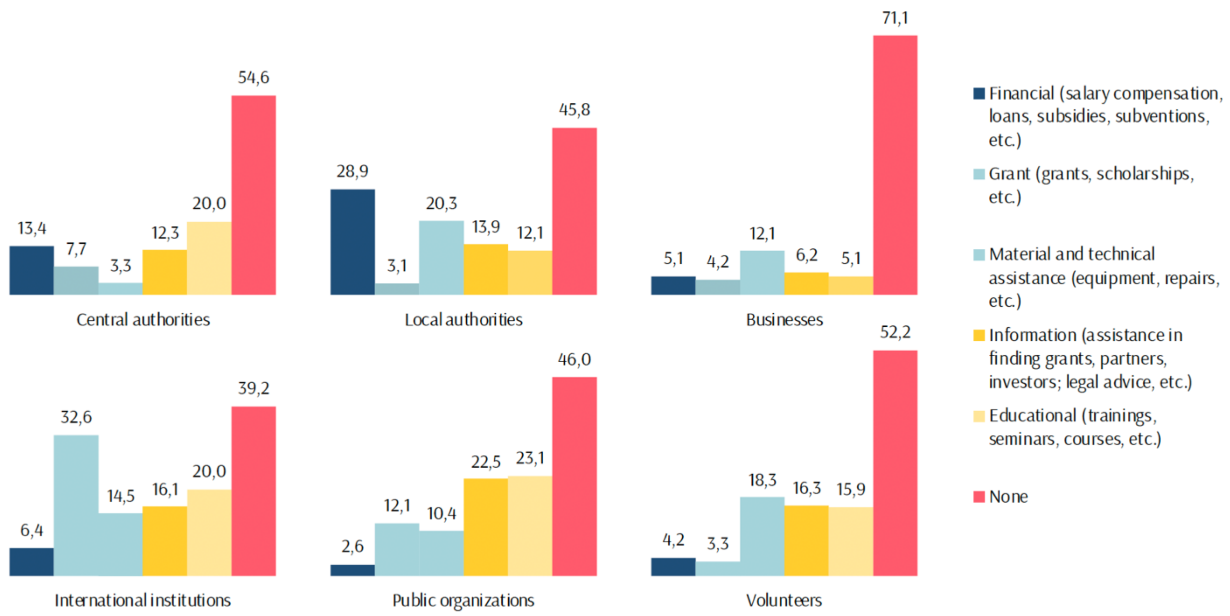


*Diagram 27 - What kind of support has been provided to your organization, starting from February 24, 2022, from:?, % (among respondents who continue to work in the sphere of culture and creative industries, N=454*

Among the government support measures, deemed most essential by respondents are grants for both the development of activities (67,4%) and cultural and artistic projects (65,4%). As a сщтіуйгутсу of the hostilities, there is a recognized need for the reconstruction and repatriation of cultural organizations's premises (40,3%) (Diagram 28). The greatest need for grants to develop institutional activities is reported by representatives of audiovisual, performing and stage arts, as well as literature and publishing. (Diagram 29).

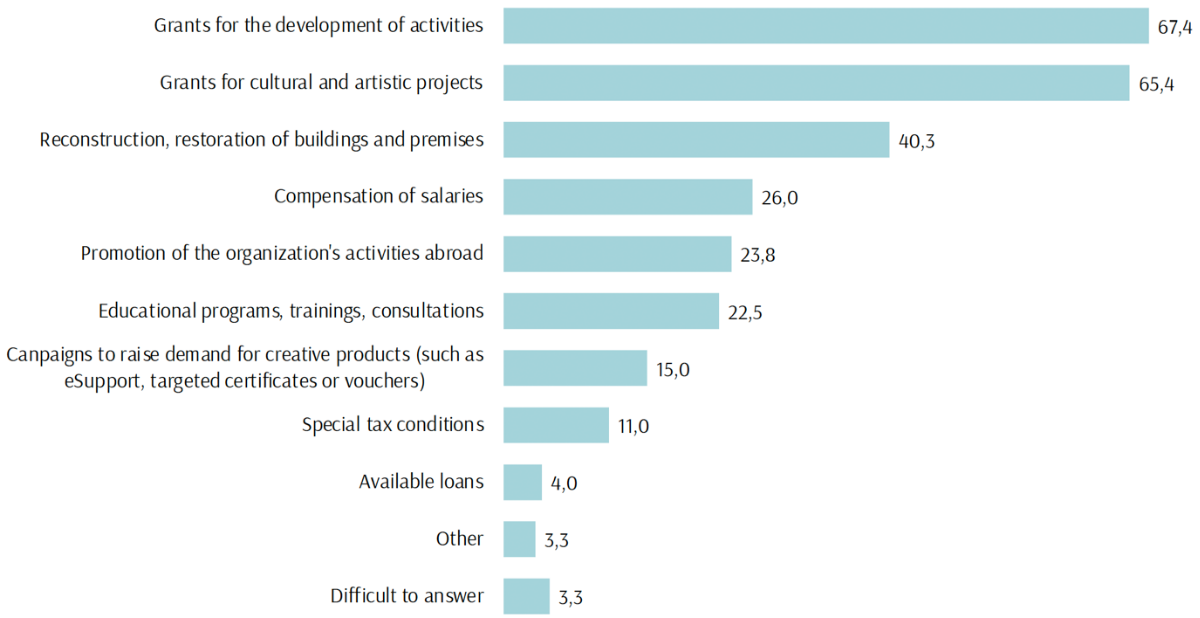


*Diagram 28 - What support measures from the state does your organization need most of all now?, % (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

| | Visual art | Audio art | Audiovisual art | Literature and publishing | Performing and stage arts | Cultural heritage | Cultural and creative industries | State organization | Municipal organization | Non-governmental organization | Individual entrepreneur |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Compensation of salaries | 13,8 | 40,0 | 33,8 | 20,4 | 41,7 | 22,6 | 18,2 | 32,0 | 31,5 | 19,6 | 11,5 |
| Grants for cultural and artistic projects | 65,5 | 65,0 | 71,4 | 68,5 | 72,9 | 65,5 | 63,6 | 60,8 | 64,7 | 75,0 | 72,1 |
| Grants for cultural and artistic projects | 69,0 | 75,0 | 79,2 | 51,9 | 66,7 | 60,1 | 69,1 | 62,9 | 54,9 | 77,7 | 78,7 |
| Available loans | 3,4 | 0,0 | 9,1 | 5,6 | 2,1 | 1,8 | 5,5 | 1,0 | 1,6 | 5,4 | 13,1 |
| Educational programs, trainings, consultations | 13,8 | 10,0 | 10,4 | 18,5 | 22,9 | 31,5 | 25,5 | 38,1 | 25,0 | 14,3 | 4,9 |
| Promotion of the organization's activities abroad | 27,6 | 35,0 | 36,4 | 9,3 | 25,0 | 20,8 | 21,8 | 14,4 | 16,3 | 36,6 | 37,7 |
| Special tax conditions | 6,9 | 25,0 | 19,5 | 14,8 | 14,6 | 5,4 | 7,3 | 6,2 | 3,8 | 17,0 | 29,5 |
| Reconstruction, restoration of buildings and premises | 20,7 | 35,0 | 16,9 | 38,9 | 50,0 | 56,5 | 30,9 | 55,7 | 60,3 | 12,5 | 6,6 |
| Canpaigns to raise demand for creative products (such as eSupport, targeted certificates or vouchers) | 17,2 | 10,0 | 14,3 | 22,2 | 18,8 | 10,1 | 21,8 | 10,3 | 11,4 | 18,8 | 26,2 |
| Difficult to answer | 10,3 | 0,0 | 3,9 | 7,4 | 0,0 | 6,0 | 3,6 | 6,2 | 4,9 | 5,4 | 1,6 |
| Other | 10,3 | 5,0 | 0,0 | 0,0 | 6,3 | 1,8 | 7,3 | 0,0 | 2,2 | 7,1 | 4,9 |

*Diagram 29 - Need for state support measures by sector/legal form, % (among respondents who continue to work in the sphere of culture and creative industries, N=454)*

## Post-war recovery of the sphere of culture

Respondents generally express optimism concerning post-war development of culture and creative industries. A rapid recovery is anticipated by 21,4% of respondents, and a slow recovery is expected by 55,8%. Compared to November 2022, the percentage of optimistic cultural workers has slightly decreased, from 85,2% to 77,2% (Diagram 30). However, there remains a high level of willingness to participate in projects aimed at rebuilding of the cultural sphere, with over 94% expressing such a willingness (Diagram 31).

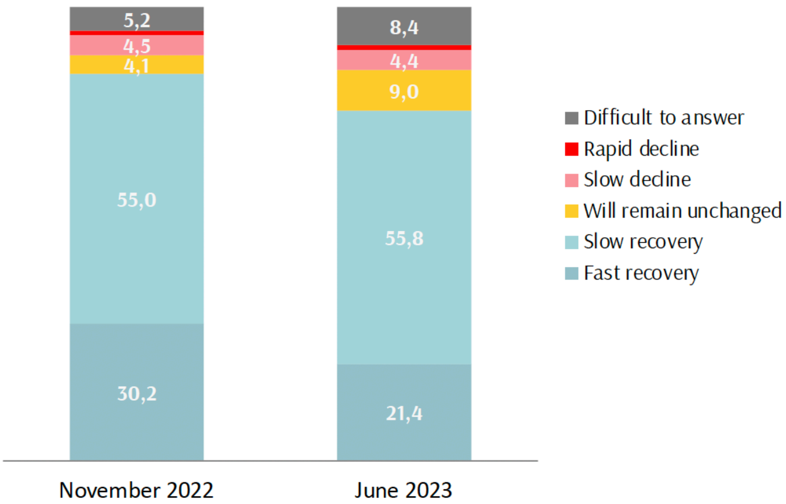


*Diagram 30 - In your opinion, how will the cultural and creative industries evolve after the war?, %, N=523*

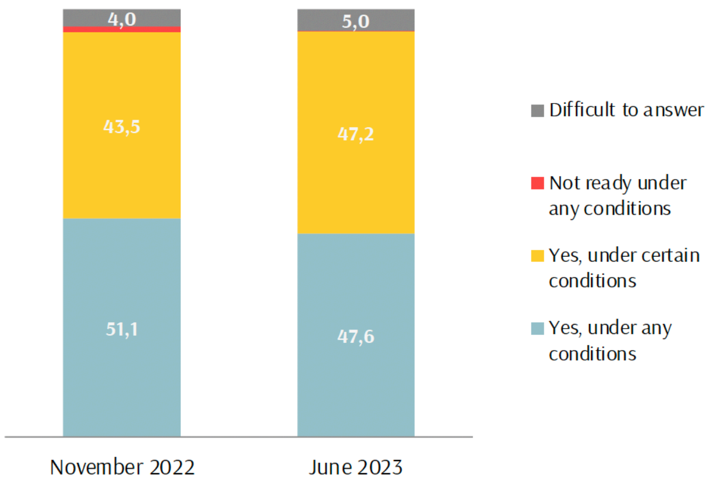


*Diagram 31 - Are you ready to join projects aimed at rebuilding the cultural sphere of Ukraine?, %, N=523*

## Profile of the respondents

The profile of the respondents demonstrates that women were more active in the survey (71,7%). The majority of the respondents (73,8%) fall within the age range of 25 and 54. Almost 80% of the respondents have not changed their place of residence since February 24. Approximately two-thirds of respondents are representatives of state/municipal organizations. The majority of the responses were received from employees of the heritage and audiovisual sectors (Diagrams 32-36).

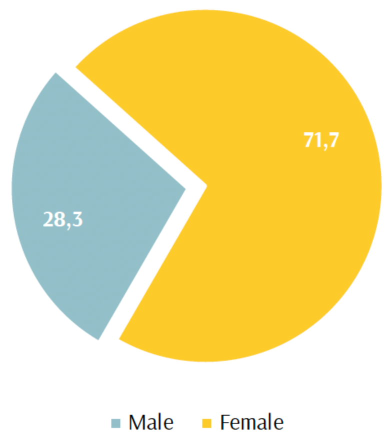


*Diagram 32 - Gender, %, N=523*

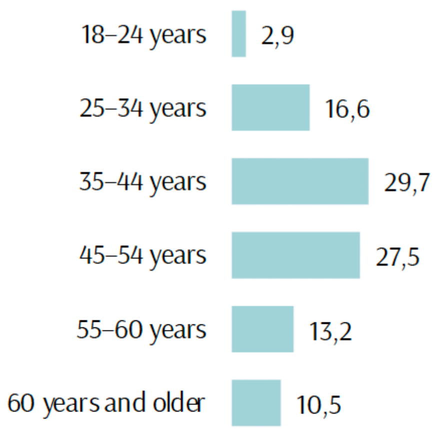


*Diagram 33 - Age, %, N =523*

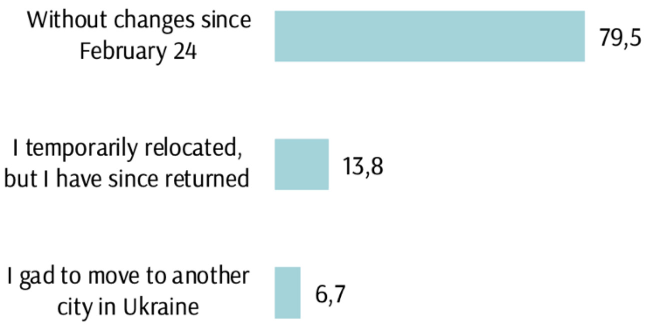


*Diagram 34 - Place of residence, %, N=523*

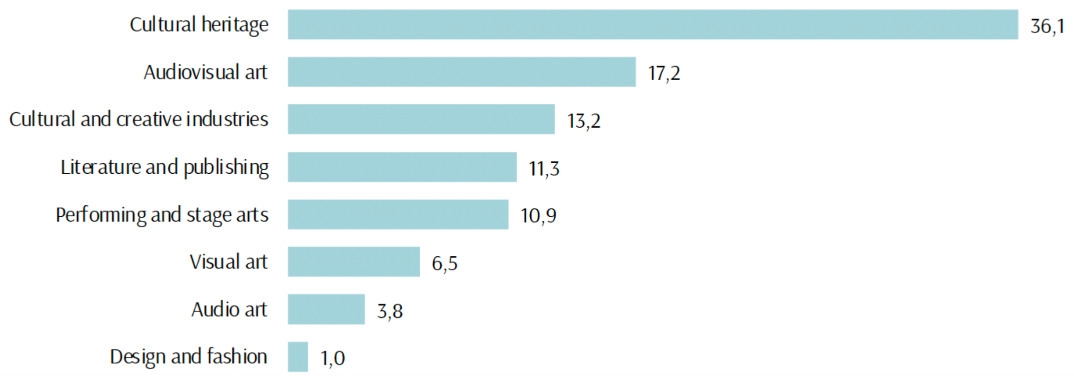


*Diagram 35 - Creative industries sector, %, N=523*

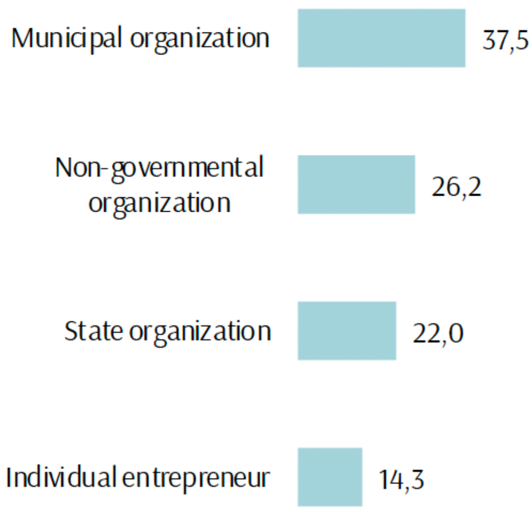


*Diagram 36 - Organization and legal form, %, N=523*

## Results of research on cultural workers abroad

The war forced many cultural workers to relocate abroad for their personal safety and that of their families. Less than one hundred respondents living abroad participated in this survey. Therefore, the results may not be fully representative and should be considered hypothetical.

In general, the results indicate that a significant number of individuals currently reside abroad continue to work for Ukrainian cultural organizations, albeit remotely (40,4%) or as self-employed (17%). Approximately 29,8% of respondents have found employment abroad, mostly in the sphere of culture while 6,4% are unemployed (Diagram 37).

Two-thirds of respondents report that their main source of income is employment. However, a significant group of respondents live on the payments they receive from the state in which they live (31,9%) or have sufficient savings (23,4%) (Diagram 38).

Most of the organizations where respondents worked before the full-scale invasion continue to operate (85,1%). However, a significant number of organizations have reduced their operations (55,3%), and 8,5% have completely ceased operations (Diagram 39).

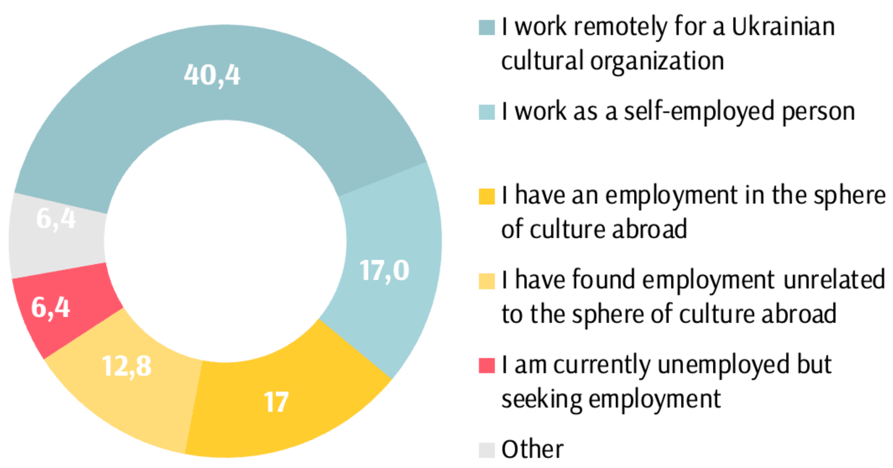


*Diagram 37 - What is your current work situation?*, %, N=47

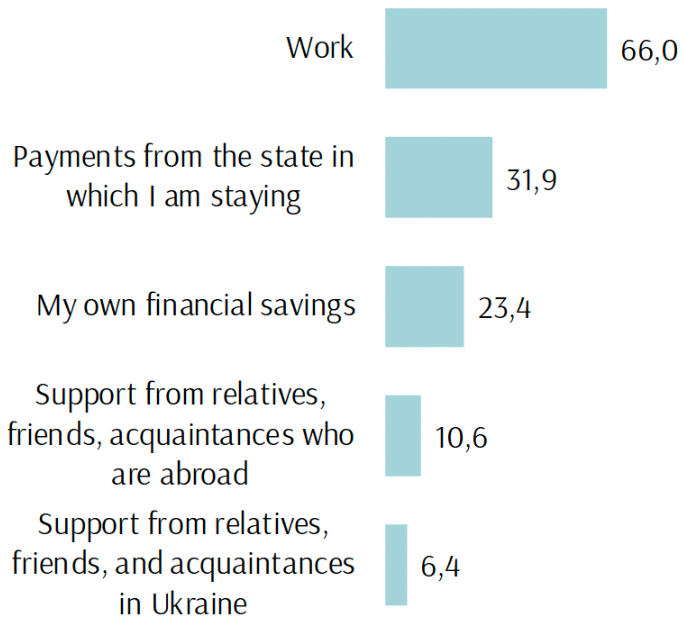


*Diagram 38 - What are your main sources of income abroad?, %, N=47*

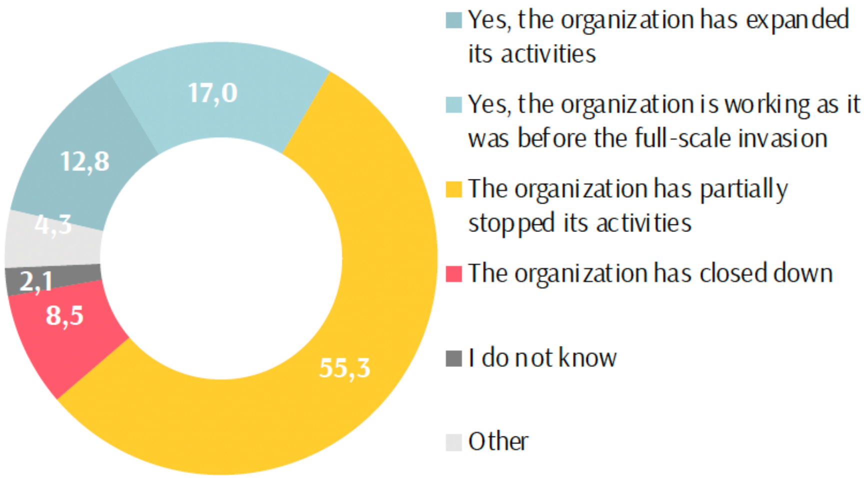


*Diagram 39 - Is the organization you worked for before the invasion still functioning?, %, N=47*

93,6% of respondents plan to return to Ukraine. However, 38,3% have not yet decided when exactly - 38,3% are unsure whether to return during the war (hostilities) or after the end of the conflict on the territory of Ukraine - 36,2% specifically plan to return after the end of the war. In the near future 19,1% of respondents intend to return (Diagram 40).

The main factor influencing the decision to return to Ukraine is the security situation as indicated by more than half of the respondents. Additionally, 36,4% want to be reunited with their families, and 18,2% plan to return because of the difficulty of adapting abroad (Diagram 41).

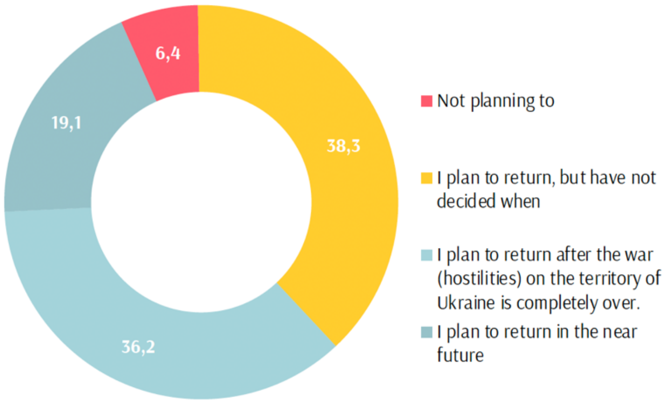


*Diagram 40 - Do you plan to return to Ukraine?, %, N=47*

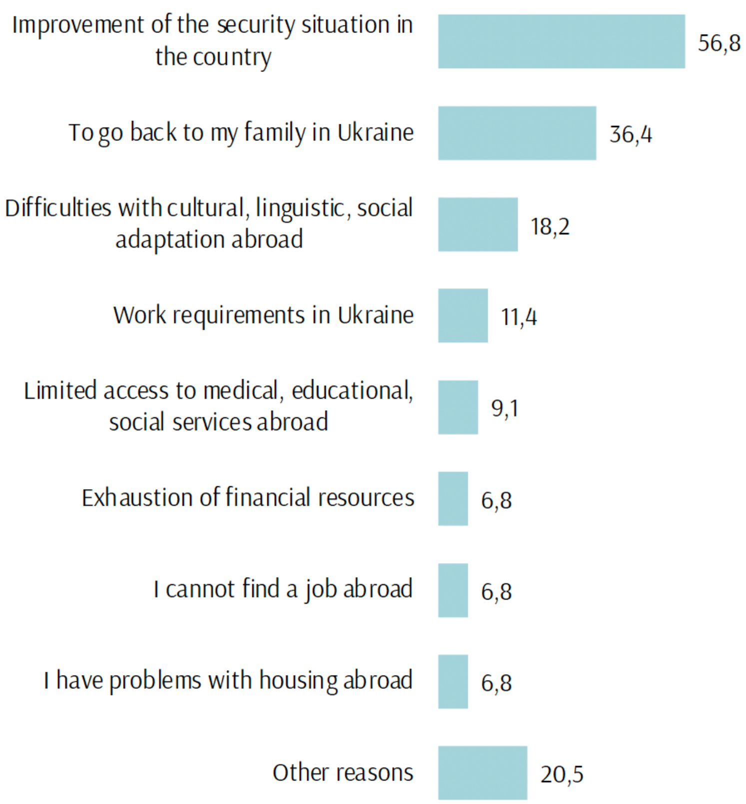

*Diagram 41 - If you plan to return to Ukraine, what are the main reasons for your decision?, %, (among those who plan to return), N=44*

The assessment of the development of the sphere of culture is generally consistent with the answers of respondents living in Ukraine, reflecting a generally positive statement. Fast or slow recovery is predicted by 74,5% of respondents currently living abroad (Diagram 42). All foreign respondents express willingness to participate in projects aimed at restoring Ukrainian culture. In particular, 44,7% - under any conditions, 55,3% - under certain conditions (Diagram 43). Despite the difficulties of relocation, 89,4% of the respondents from abroad are actively involved in projects supporting Ukrainian culture, while 8,5% are not engaged but express readiness to change this attitude (Diagram 44).

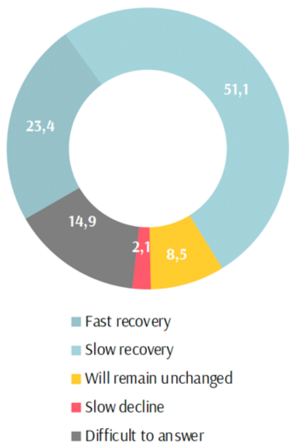


*Diagram 42 - How do you think the sphere of culture and creative industries will develop after the war?, %, N=47*

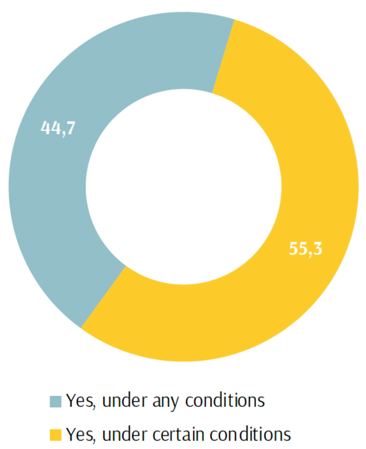

*Diagram 43 - Are you ready to participate in the implementation of projects aimed at reconstruction of the cultural sphere of Ukraine?*, %, N=47

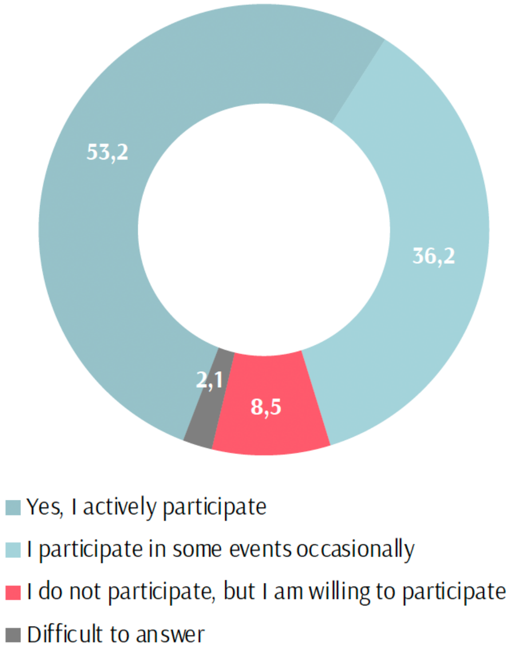


*Diagram 44 - Do you take part in projects supporting Ukrainian culture abroad?*, %, N=47

## Profile of the respondents

The vast majority of respondents abroad are women (80,9%) (Diagram 45). Most of the respondents have left Kyiv (38,3%), Kharkiv (12,8%) and Dnipro (8,5%) regions (Diagram 46). A significant number of those who have relocated now reside in Poland (19,1%), Germany (17%) and France (10,6%) (Diagram 47). The majority of the respondents abroad fall within the age range of 25 and 55 years old (85,1%) (Diagram 48). In terms of professions, a notable percentage work in cultural and creative industries (25,5%) followed by performing arts (19,1%) (Diagram 49). A significant portion of these individuals are employed by non-governmental organizations (36,2%) (Diagram 50).

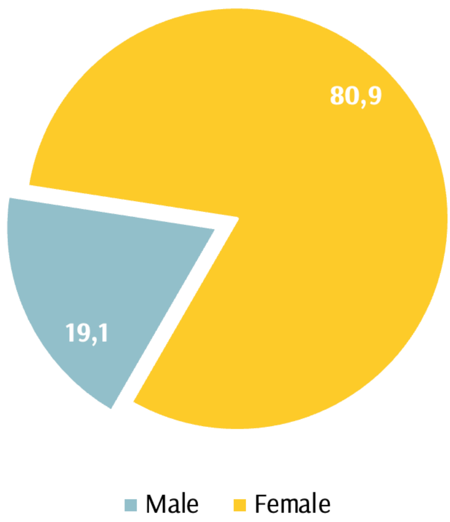


*Diagram 45 - Gender, %, N=47*

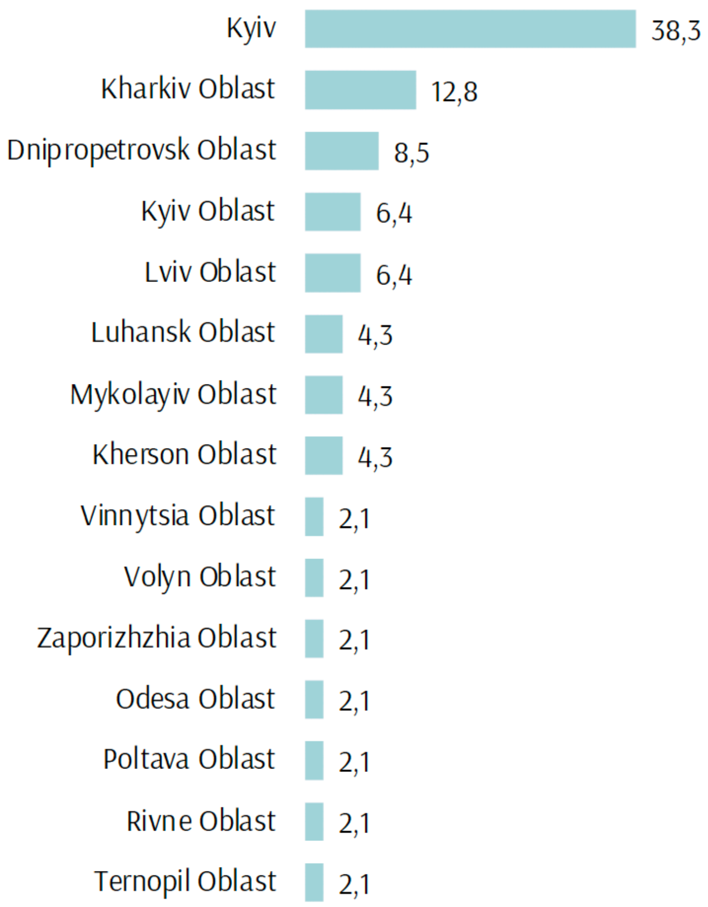


*Diagram 46 - Place of residence before full-scale invasion, %, N=47*

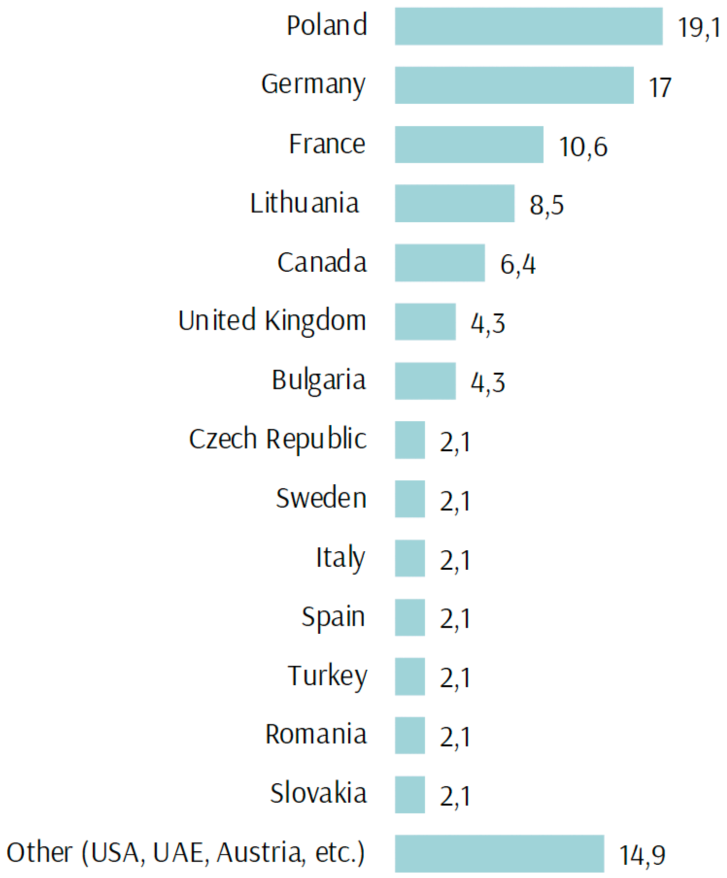


*Diagram 47 - Country of residence, %, N=47*

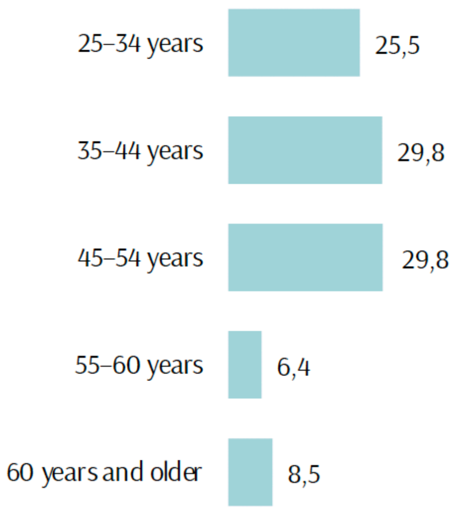


*Diagram 48 - Age, % N =47*

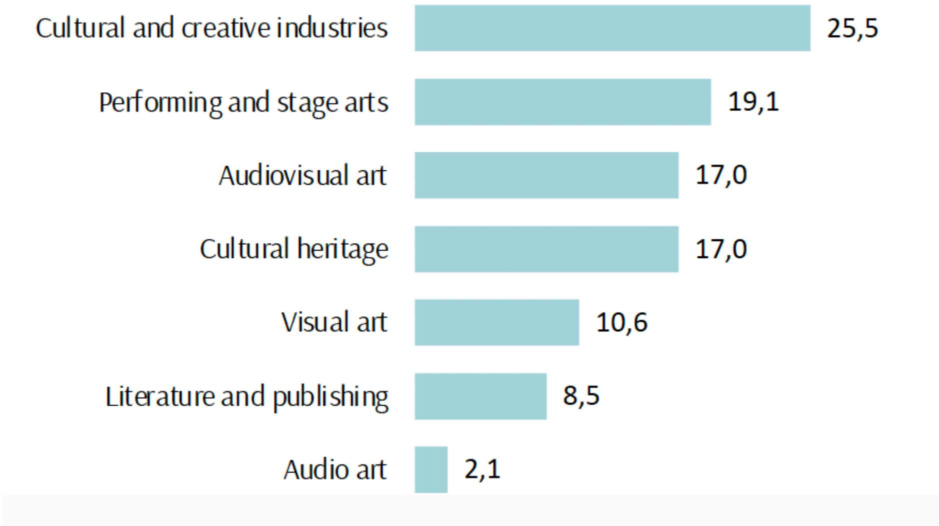


*Diagram 49 - Creative industries sector, %, N=47*

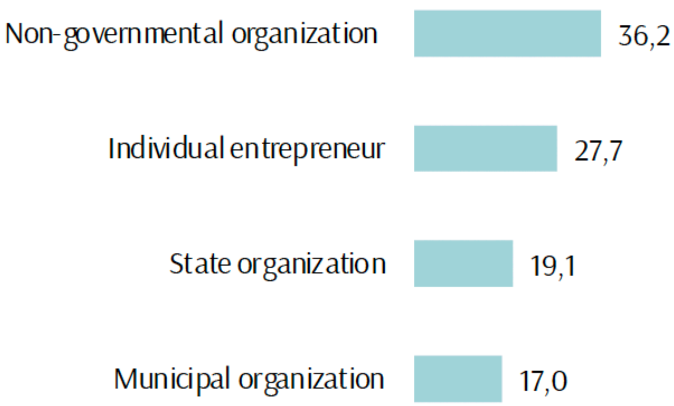


*Diagram 50 - Organization and legal form, %, N=47*

# CONCLUSIONS

- Almost half of the respondents express a negative assessment of the current state of the cultural sphere in Ukraine. According to the respondents, the main problems in the development of the cultural sphere are the lack of stable state financial support, low salaries for cultural workers, and the shortage of qualified personnel.

- The respondents have characterized the overall level of support for culture and creative industries as low. In their opinion, the most substantial support emanates from international organizations, NGOs and volunteers. The lowest scores were assigned to support from the central government and business. These data do not differ significantly from the results of the previous survey, indicating that there have been no noticeable changes in support for culture. Thus, high-quality projects that involve support for culture from both the government and business continue to be relevant.

- In the first half of 2023, the share of respondents who assess the state of affairs in their organizations as generally positive increased slightly compared to the second half of 2022. Representatives of the cultural heritage, literature and publishing sectors noted a significant improvement in the situation in their organizations. The level of positive assessment of the situation is higher among state and municipal organizations than among non-governmental organizations and individual entrepreneurs.

- In 2023 the general level of adaptability to the conditions of war increased. The organizations of literature and publishing as well as cultural heritage demonstrated the highest level of adaptability, while the lowest level was observed in the audiovisual arts and cultural and creative industries sectors.

- The main measures for successful adaptation of organizations to the war conditions include cost optimization, applying for grants, scholarships, residencies, etc., creating of new cultural products, and accelerating the digitization of the organization's activities. Compared to November 2022, the significance of cost optimization for adapting to war conditions has diminished, no longer occupying a central role in a successful adaptation strategy. Today, proactive actions are recognized as the key measures to enhance the adaptability factor.

- According to the respondents, the main obstacles to the adaptation of organizations include the lack of state funding and the uncertainty of the overall situation in Ukraine (the relevance of the latter has significantly decreased in comparison with the previous wave of the survey). This suggests that a significant number of cultural organizations persist in a paternalistic relationship model of relations with the state, relying heavily on budgetary funds for financing. Contrasting the findings of the November 2022 survey, the structure of demotivating factors for adaptation has undergone some changes. The core of demotivation now includes, in addition to lack of funding, a decrease in demand for cultural products/services and challenges in attracting international financial support (grants, sponsorships, etc.). This indicates the need to develop new projects aimed at supporting cultural workers in enhancing their communication and grant work, especially with international donors.

- The survey results indicate that approximately one-third of cultural organizations have developed a crisis action plan. Importantly, the availability of a crisis plan clearly affects the level of adaptation to war conditions. Organizations with such a plan demonstrate a significantly higher level of adaptation.
- The most significant request for government assistance currently pertains to grants for business development and grants for cultural and artistic projects. The consequences of the hostilities have also highlighted the need to rebuild and repair the premises of cultural institutions. There is an observed pattern where the non-governmental sector of the cultural sphere requires grants for cultural and artistic projects, while the governmental sector needs assistance in restoring infrastructure. Respondents continue to point out that a separate program should be created to restore the most heavily damaged regions resulting from hostilities.
- There is a consistently high optimistic assessment of the prospects for the post-war reconstruction of Ukraine's culture and creative industries. Thus, more than three-quarters of respondents expect a gradual or rapid recovery of the cultural sector. However, compared to the 2022 survey, this figure has decreased by 5%.
- Most of the cultural workers who are currently abroad plan to return to Ukraine. Many of them still continue to work in Ukrainian cultural institutions. The main obstacle to their return is the difficult security situation in Ukraine.

In summary, the cultural sphere continues its ongoing adaptation to the conditions of war. Compared to November 2022, the overall adaptability of the culture and creative industries has increased, according to the respondents. Overall, the situation is better in organizations/institutions in the cultural heritage, literature and publishing sectors. On the contrary, employees of organizations/institutions in the audiovisual and audio sector are more likely to report difficulties. Employees of non-governmental organizations and individual entrepreneurs generally exhibit lower levels of adaptation to the war, highlighting the need for additional support and special programs to restore their professional activities. According to the respondents, the most effective means of support are grants for business development and cultural and artistic projects. Despite the difficulties of the war, there are still generally positive expectations for the recovery of the cultural sphere after the war.