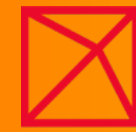




Centre for
Economic
Recovery



Advanter

MIGRATION AND SOCIO-POLITICAL CLIMATE DURING THE FULL-SCALE WAR OF RUSSIA AGAINST UKRAINE – the first wave of the study

Analytical report

May 2022



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



Target audience of the study: men and women, aged 18 to 60, who live in Ukrainian cities with a population of 50 thousand and more.



Number of successful interviews:
1st wave – 2083.



Field period of the survey:
1st wave – May 20 - May22

CONCLUSIONS (1/2)

Ukrainians' actions during the war

- **63% of Ukrainians* have stayed at their permanent places of residence.** The residents of the Western (81%), Central (78%) and Southern (69%) regions are more likely to have done so, while the residents of the Eastern region are less so (33%).
- The rest of Ukrainians* (37%) **were forced to leave** their homes. 12% of them have already returned home (mostly Kyiv residents and residents of the Northern region - 26% and 19%, respectively), and a quarter (25%) continue to be displaced (especially the residents of the Eastern region - 61%).
- 56% of **those who relocated** went to another oblast of Ukraine, 26% - went abroad, and 18% - relocated within their oblast.
- In case of further aggravation of the situation, 55% of the respondents who stayed in Ukraine **want to stay at their current place of residence**, while 19% would rather relocate within Ukraine, and 12% would rather go abroad.
- About half (46%) of the respondents declare the lack of opportunity to relocate. At the same time, the number of people who have the **opportunity to migrate is greater than the number of those who wish to do so**. 28% respondents can relocate within the country, and 18% - can go abroad.
- The vast majority (73%) of those who are currently abroad **want to return to Ukraine** as soon as possible, while 12% want to stay where they are. When it comes to possibility of staying abroad, 58% of the respondents say they have the opportunity, while 22% do not have it and will return home as soon as they get the chance.
- 83% of those who relocated within Ukraine **want to return home** as soon as it's safe, while 7% of the respondents would rather stay at the new place. 39% of internally displaced persons have the opportunity to continue living at the new place, and 49% do not.

CONCLUSIONS (2/2)

Effect of the full-scale war on Ukrainians'* lives

- **Money and access to work are the things that Ukrainians* currently need the most** – 66% and 44% of respondents, respectively, have indicated having such needs. Residents of the Eastern, Southern, and Northern regions tend to have bigger and more varied needs.
- **Physical and mental health of Ukrainians* is considered by them to be rather poor:** only 39% and 38% of respondents, respectively, report not having any problems with physical and mental health.
- 26% of respondents have received **humanitarian aid from the Ukrainian government** since the beginning of the war. They mostly received food, money, hygiene items, and clothing. When it comes to **sufficiency of the aid**, the opinions are divided: 44% consider it sufficient, and 48% consider it insufficient.
- Among people who moved abroad during the war, 54% **received humanitarian aid from the country they stayed in**. Respondents most often received food, money, temporary accommodation, hygiene products, and clothing. 75% consider the aid they received to be sufficient.

Perception of the full-scale war with Russia

- **Most respondents consider the government's actions to be effective when it comes to the military confrontation.** In general, 68% of respondents rated the actions of the Ukrainian authorities since the beginning of the full-scale war as effective. In addition, 72% consider actions of the authorities in the field of military protection of the country from the aggressor to be effective.
- When it comes to **economic regulation**, **almost half** of the respondents (47%) believe that actions of the state are **effective**.
- According to the respondents, the **least effective** (31%) are the measures to aid those who **lost their jobs** and income during the war; 44% of the respondents consider these actions to be ineffective.
- The **most trusted** institutions are the **Armed Forces of Ukraine** and the **President of Ukraine** – 62% and 49% of the respondents, respectively, have indicated their trust in these entities



UKRAINIANS'* ACTIONS DURING THE WAR

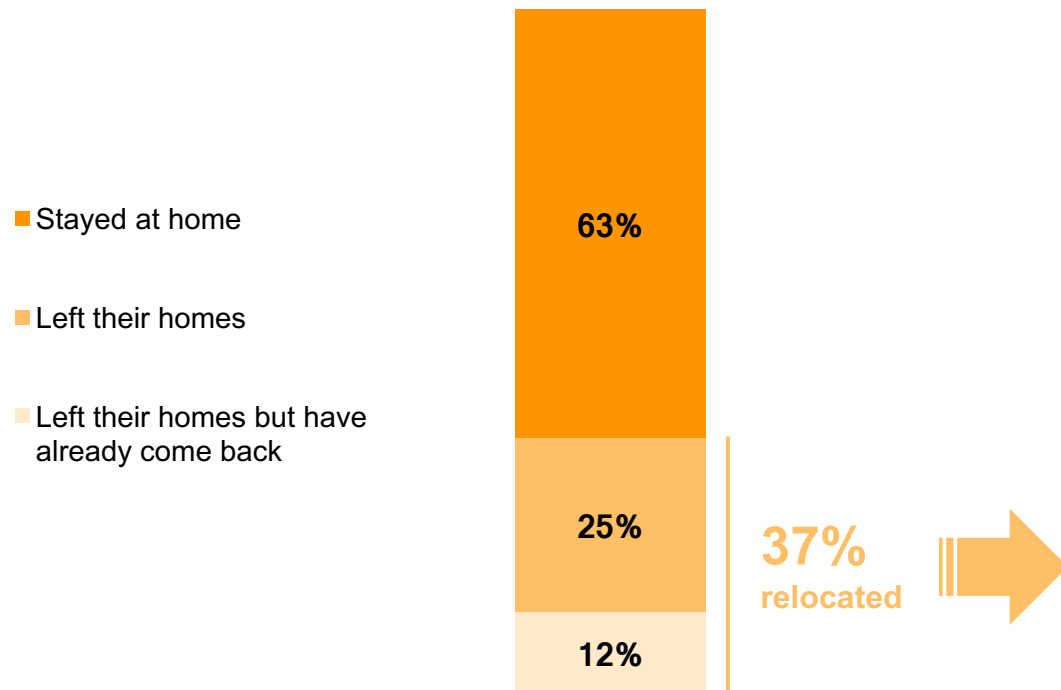
*Ukrainians - residents of cities with population of 50 thousand and more, aged 18-60 years, who use smartphones

RELOCATION DUE TO THE WAR

The vast majority (63%) of Ukrainians* have remained at their place of residence since the full-scale war had begun; the rest of the audience (37%) have changed their place of residence, with 12% of them having already returned home.

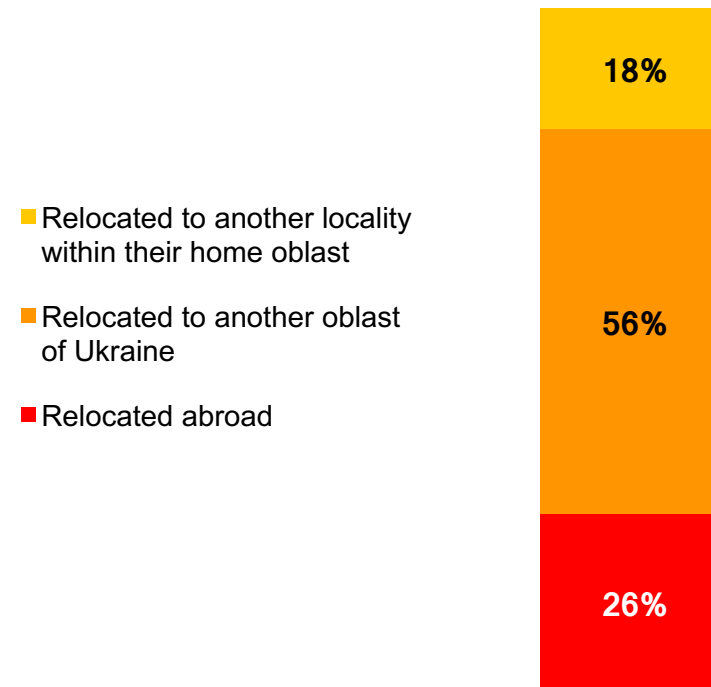
Those who relocated mostly went to another oblast of Ukraine (56%) or abroad (26%); less than a quarter (18%) of respondents migrated within their oblast.

Relocation of Ukrainians* due to the war



Base: all respondents, N = 2083

Relocation specifics



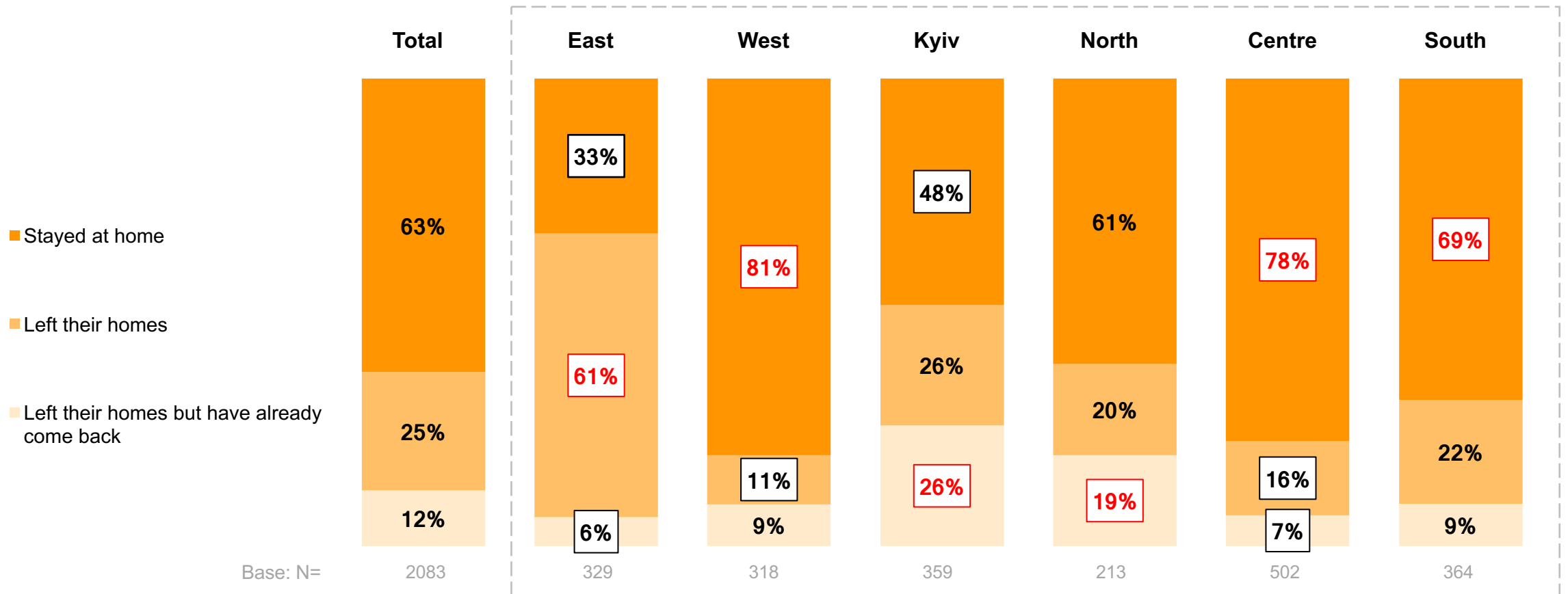
Base: respondents who relocated, N= 776

*Ukrainians - residents of cities with population of 50 thousand and more, aged 18-60 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:

RELOCATION DUE TO THE WAR

by region

Residents of the Eastern region are more likely to have left their homes, while residents of the Western, Central and Southern regions remained at their place of residence. Residents of Kyiv and the Northern region are already returning home.



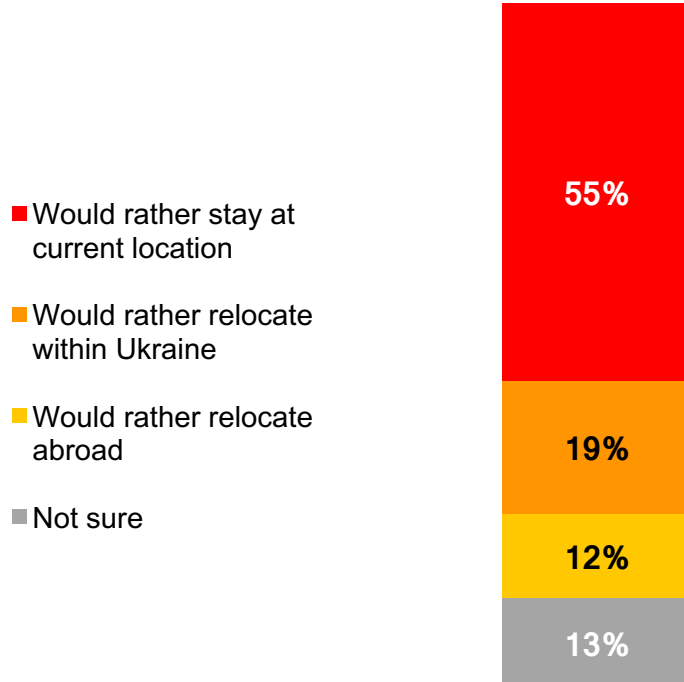
Base: all respondents
Which of the following phrases best reflects your actions in the situation of Russia's war against Ukraine:

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

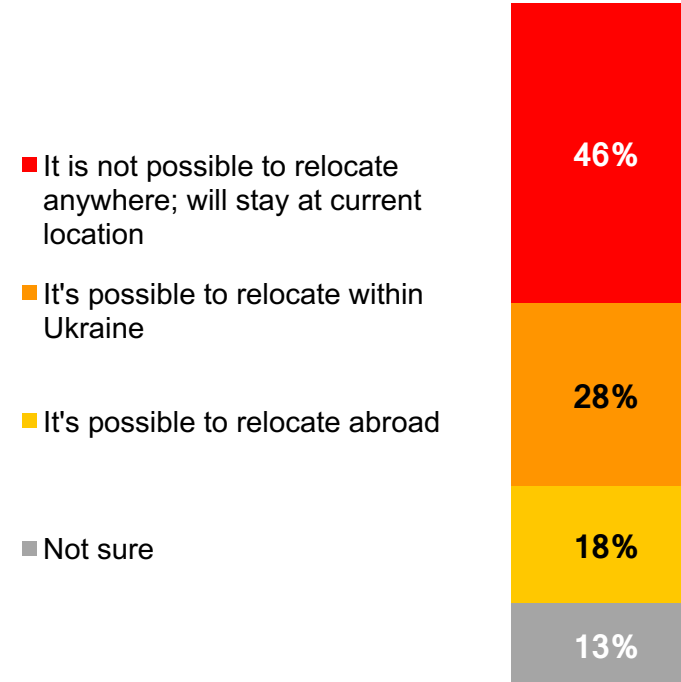
PREFERRED MODE OF ACTION IN CASE OF AGGRAVATION & OPPORTUNITY TO RELOCATE

In case of further aggravation of the situation more than half (55%) of the respondents who stayed at home or changed their place of residence within Ukraine want to stay at their current place of residence, while less than a third (31%) of the respondents would rather relocate (19% within Ukraine and 12% abroad). At the same time, respondents equally report both possibility and impossibility of relocation - 46% vs 46%. 28% have the opportunity to relocate within Ukraine, and 18% have the opportunity to go 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 those stayed at home or relocated within Ukraine, N = 1881

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

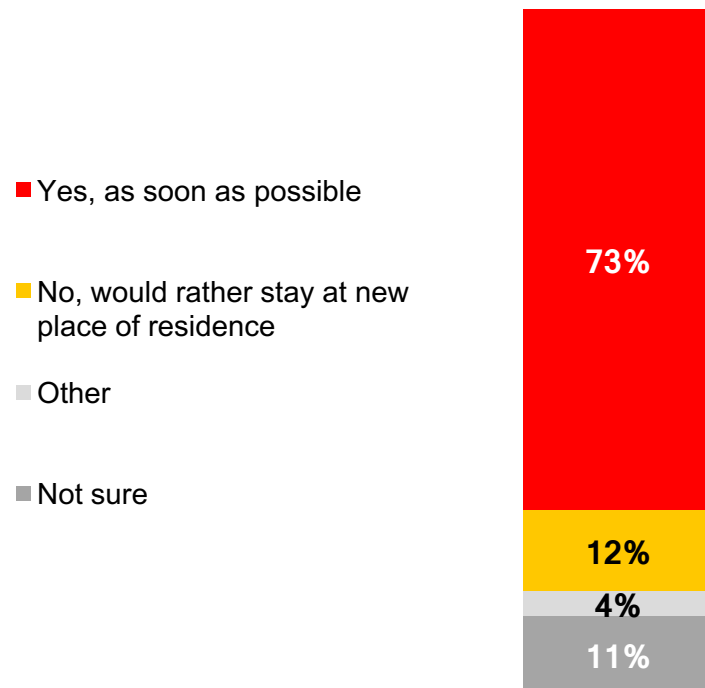
In case of further exacerbation, is it possible for you to relocate further away, go abroad or stay where you are now?

WISHES REGARDING COMING BACK FROM ABROAD. POSSIBILITY OF STAYING THERE

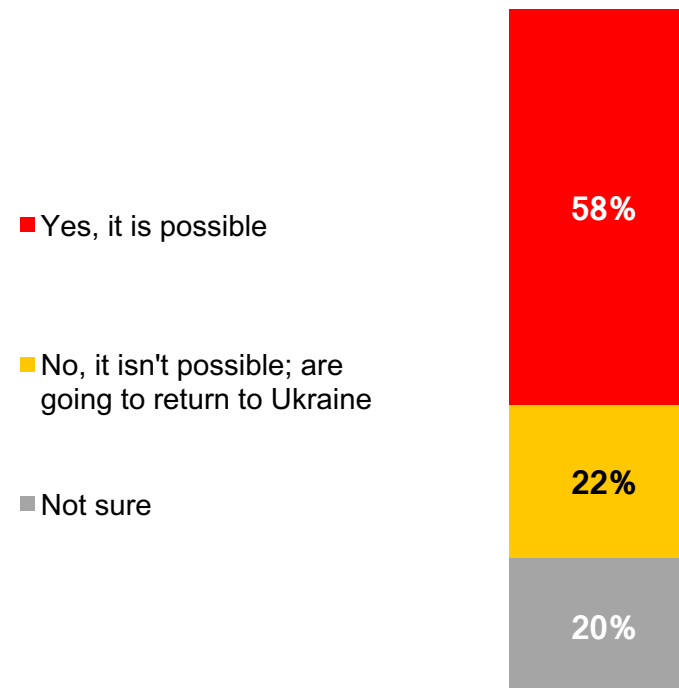
73% of those who have gone abroad and have not returned to Ukraine yet want to return home as soon as possible, while 12% want to stay at their new place of residence.

More than half (58%) of the respondents say that they have the opportunity to stay abroad; 22% say they don't.

Wishes regarding coming back from abroad



Possibility of staying abroad



Base: respondents who relocated abroad and have not come back yet, N = 166

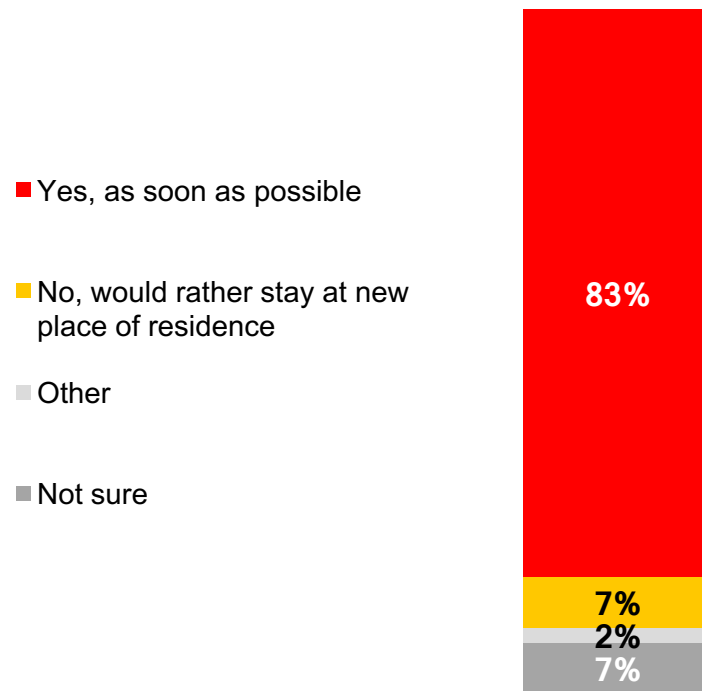
Do you want to return to Ukraine?

Is it possible for you to stay abroad?

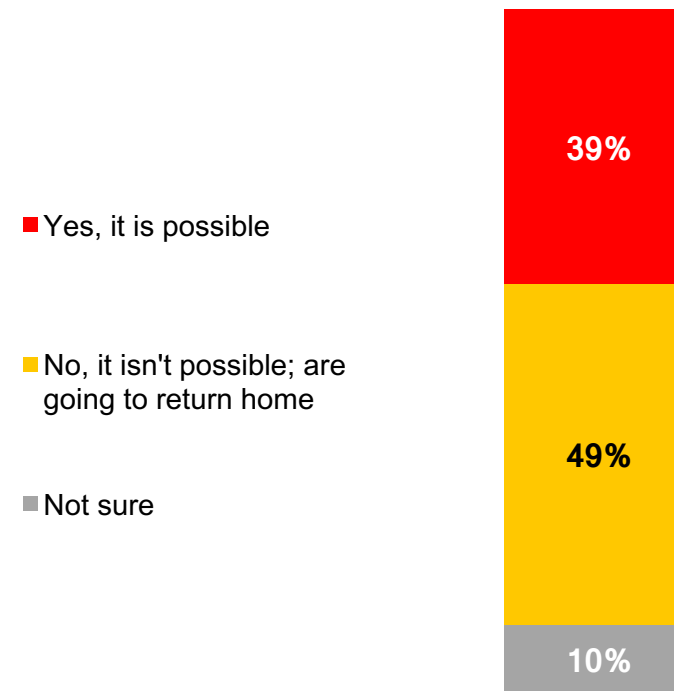
INTERNALLY DISPLACED PERSONS' WISHES REGARDING COMING BACK. POSSIBILITY OF STAYING WHERE THEY ARE

83% of the respondents who had left their home and moved to a new place of residence within Ukraine want to return home as soon as possible in the event of cessation of hostilities there, while 7% of respondents would rather to stay at the new place. When it comes to possibility of staying at the new place, 39% claim that it's possible for them, while 49% claim that it is not.

Wishes regarding coming back home



Possibility of staying at the new place



Base: respondents who relocated within Ukraine and have not come back yet, N = 361

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?

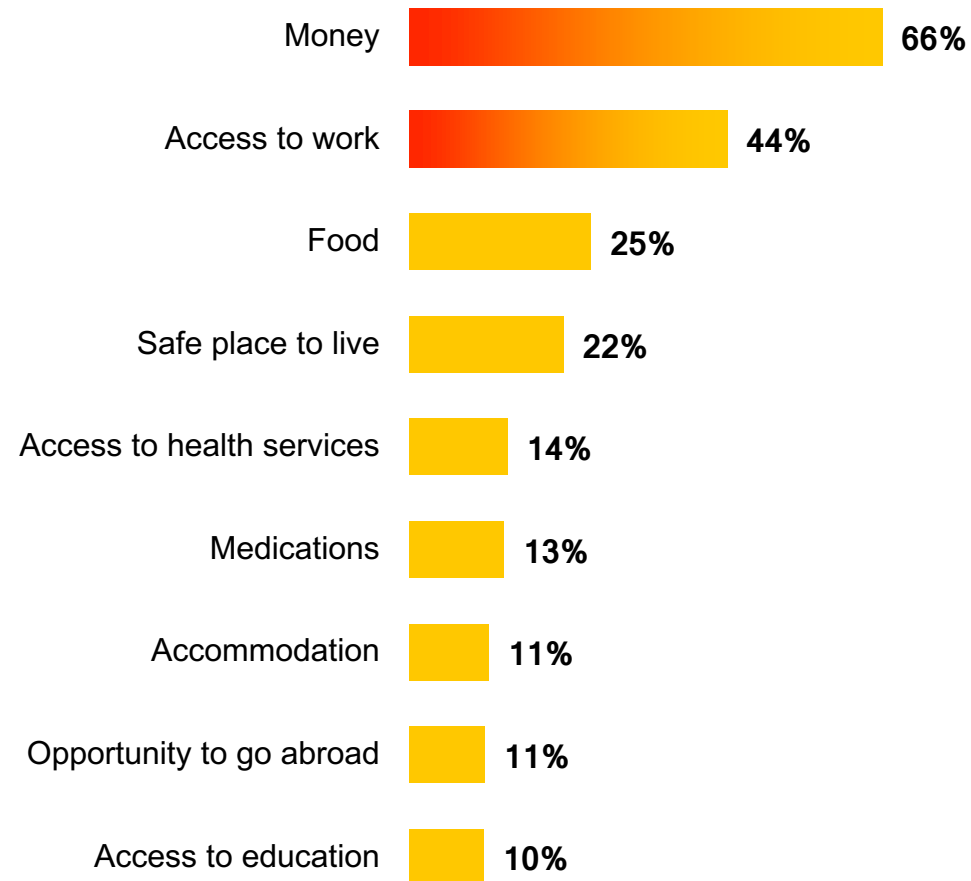


EFFECT OF THE FULL- SCALE WAR ON UKRANIANS'* LIVES

*Ukrainians - residents of cities with population of 50 thousand and more, aged 18-60 years, who use smartphones

THINGS THAT ARE NEEDED MOST

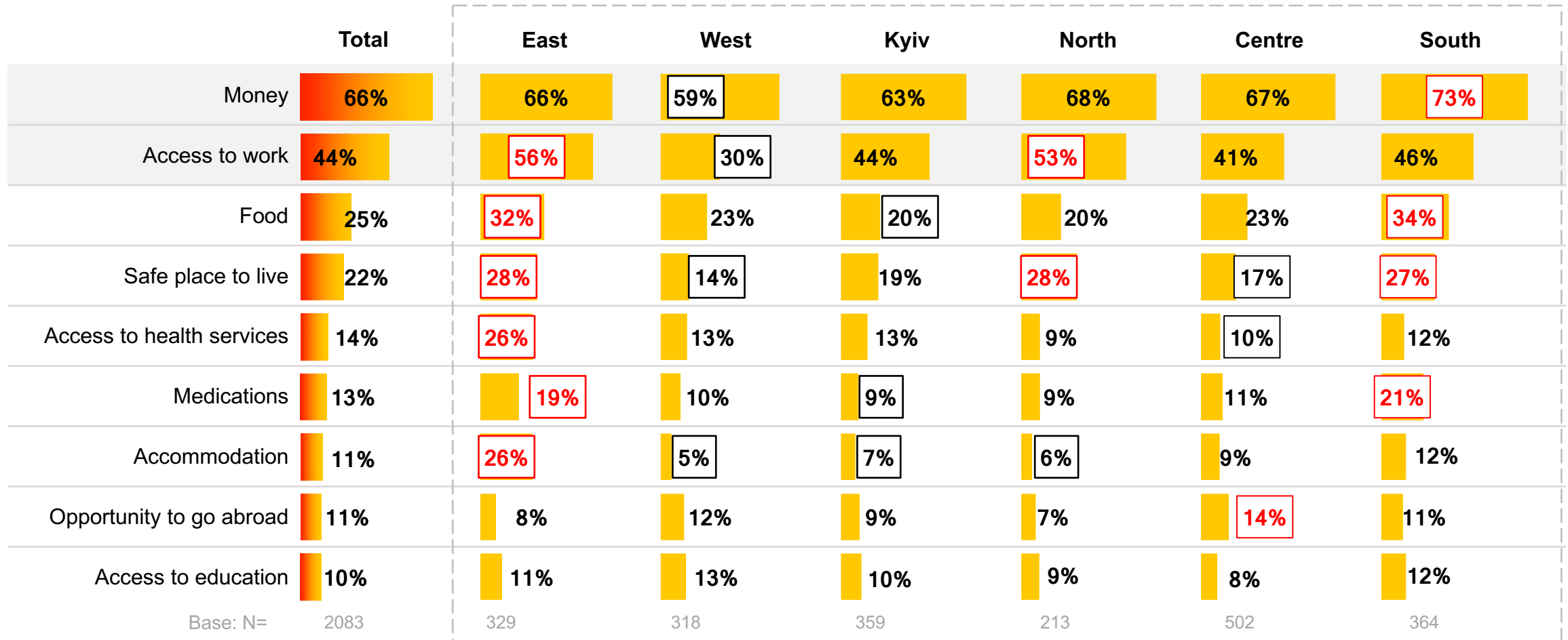
Money (66%) and access to work (44%) are the things that respondents and their families currently need the most.



FAMILIES' NEEDS

by region

The biggest needs are those of money and access to work, regardless of the group. Residents of the Eastern and Southern regions in general tend to have bigger and more varied needs.

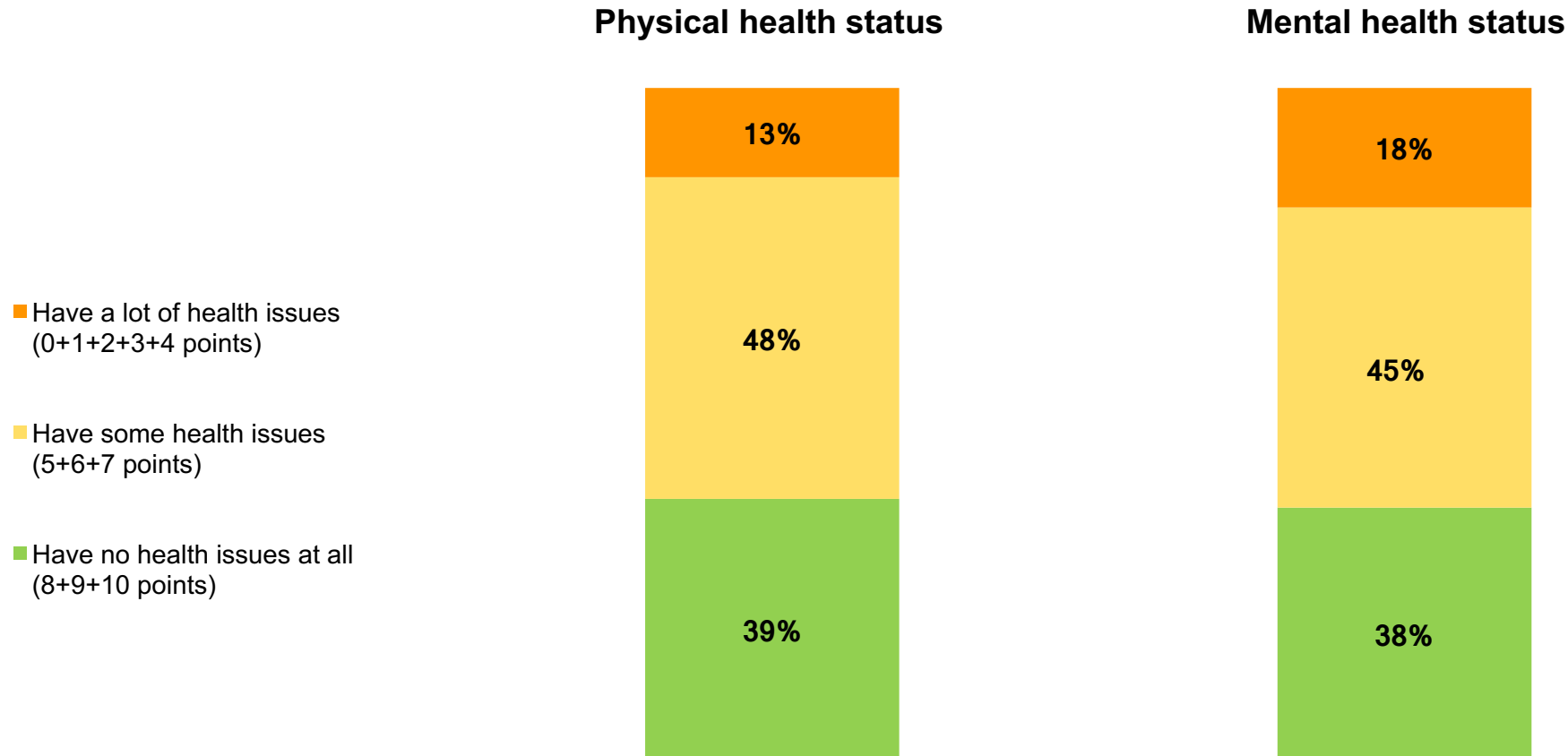


Base: all respondents
As of today, what do you or your family need most?

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

SUBJECTIVE ASSESSMENT OF HEALTH

Almost half of the respondents report having some problems with physical (48%) and mental (45%) health, while about a third deny having any health issues (39% and 38%, respectively); 13% and 18% of respondents, respectively, have many problems of such kind (by their own assessment).



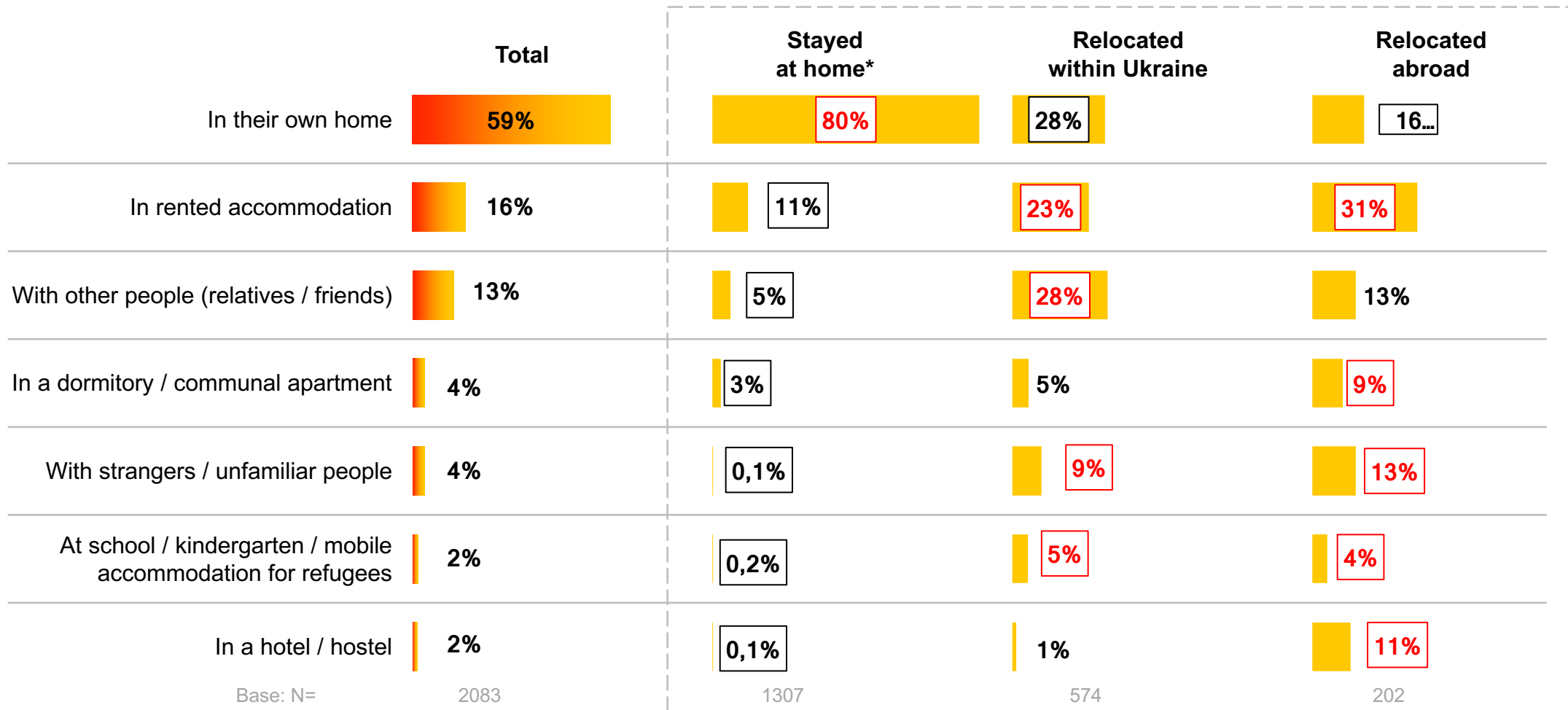
Base: all respondents, N = 2083

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'.

CURRENT RESIDENCE

The vast majority (59%) of the audience report living in their own home. Among those who remained in their home locality, this figure is the highest (80% vs. 59%), while those who relocated within Ukraine or abroad were more likely to find other places to live, in particular by renting or living with relatives and friends (the latter is especially true for internally displaced persons).



*Home here should be understood as the locality where the respondent's permanent place of residence is.

Base: all respondents

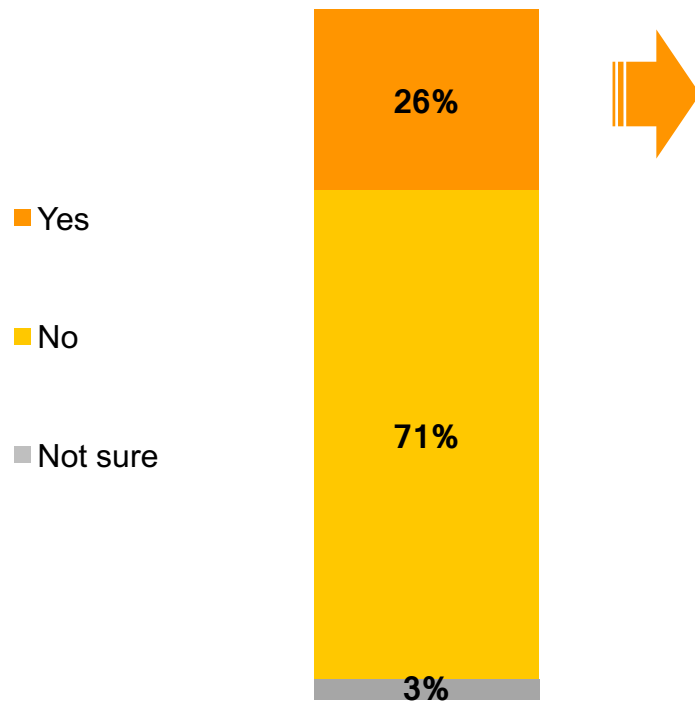
Where do you reside at the moment?

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

HUMANITARIAN AID FROM THE UKRAINIAN GOVERNMENT

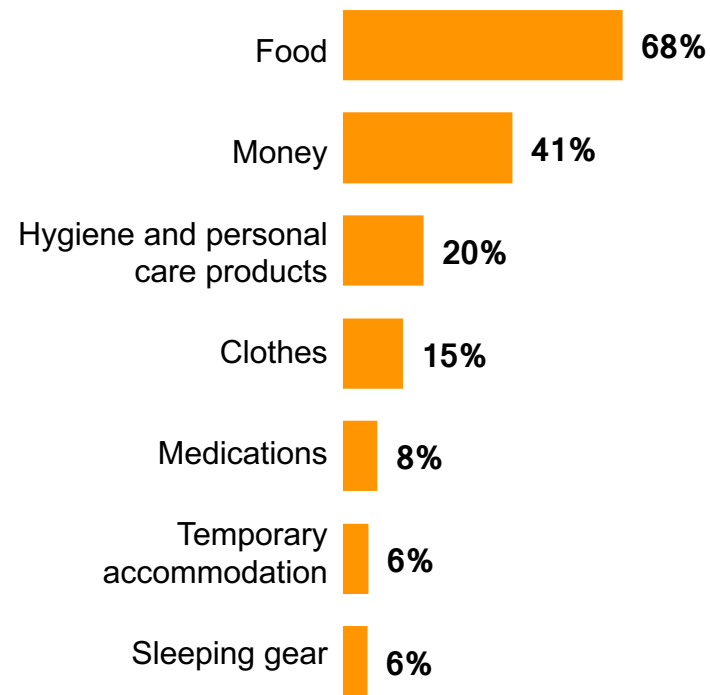
26% of Ukrainians have received humanitarian aid from the state since the beginning of the war. Mostly, this assistance included food, money, hygiene and personal care products, and clothing. Among those who have received humanitarian aid from the Ukrainian government, 44% consider it sufficient and 48% consider it insufficient.

Reception of humanitarian aid from the government



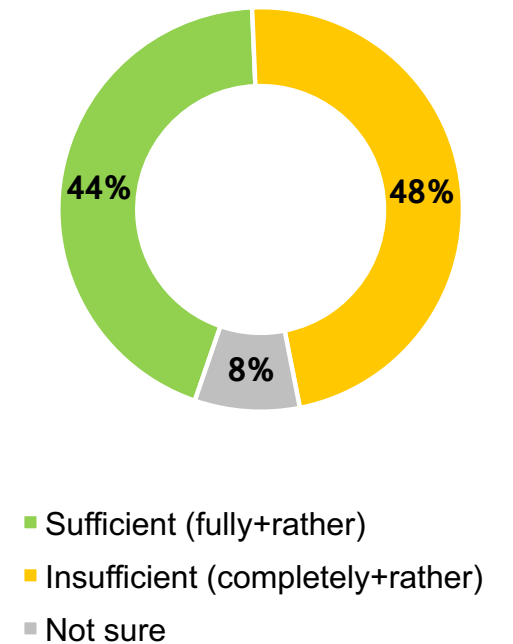
Base: all respondents
N=2083

Type of humanitarian aid



Base: respondents who received aid from government, N=544

Sufficiency of the humanitarian aid



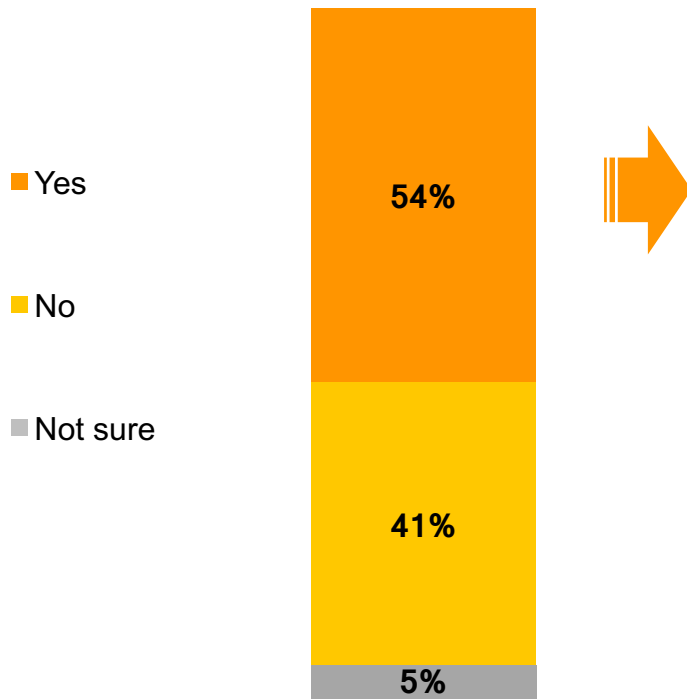
Base: respondents who received aid from government, N=544

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?

HUMANITARIAN AID FROM THE FOREIGN GOVERNMENT

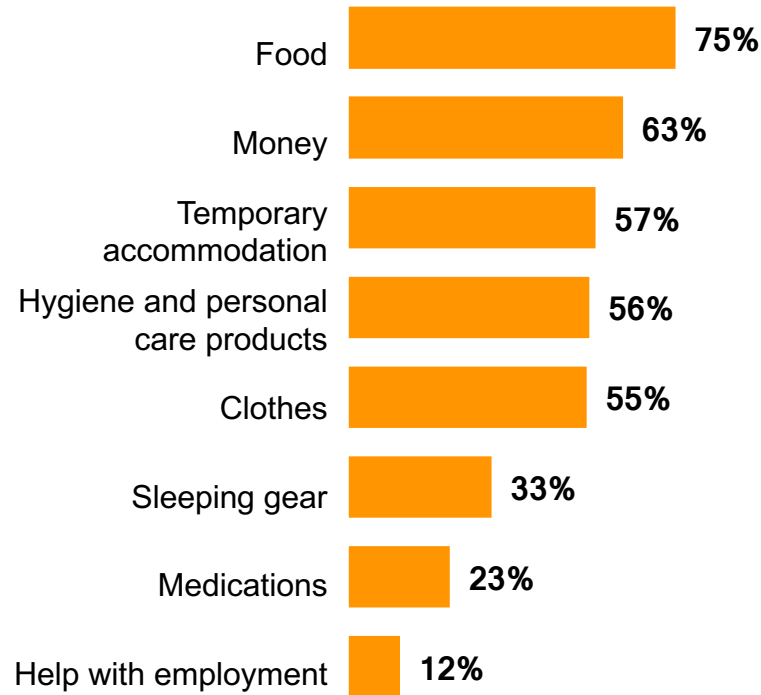
Among Ukrainians who moved abroad during the war, 54% received humanitarian aid from the country they stayed in. Respondents most often received food, money, temporary accommodation, hygiene products, and clothing. 75% consider the aid they received to be sufficient.

Reception of humanitarian aid from the government



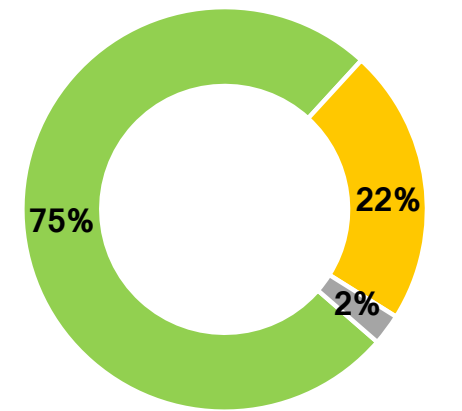
Base: respondents who relocated abroad, N=202

Type of humanitarian aid



Base: respondents who received aid from foreign government, N=109

Sufficiency of the humanitarian aid



■ Sufficient (fully+rather)
 ■ Insufficient (completely+rather)
 ■ Not sure

Base: respondents who received aid from foreign government, N=109

Have you or your family received humanitarian or financial aid from the local government of the country you currently reside? What kind of humanitarian aid did you or your family receive from the local government of the country you currently reside? How would you assess the aid provided to you or your family by the local government of the country you currently reside?



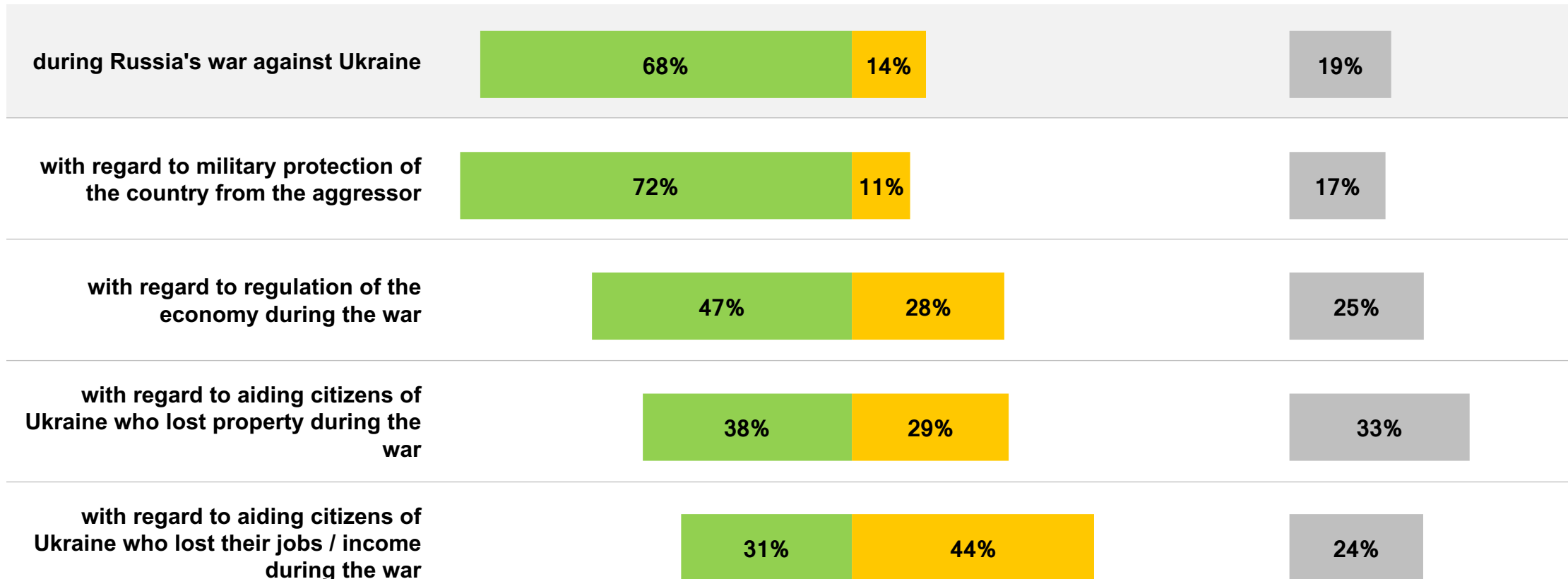
**PERCEPTION OF THE
FULL-SCALE WAR WITH
RUSSIA**



EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES...

More than two thirds of the respondents (68%) assess the actions of the Ukrainian authorities since the beginning of Russia's war against Ukraine as effective. In particular, respondents give the highest assessment (72%) to the actions of the authorities with regard to military protection of the country from the aggressor. Less than half of the respondents consider the government's actions to regulate the economy and help those who lost their property as a result of the war to be effective (47% and 38%, respectively). According to the respondents, the least effective (31%) are the measures to aid those who lost their jobs and income during the war.

Effective (very + rather) Ineffective (very + rather) Not sure

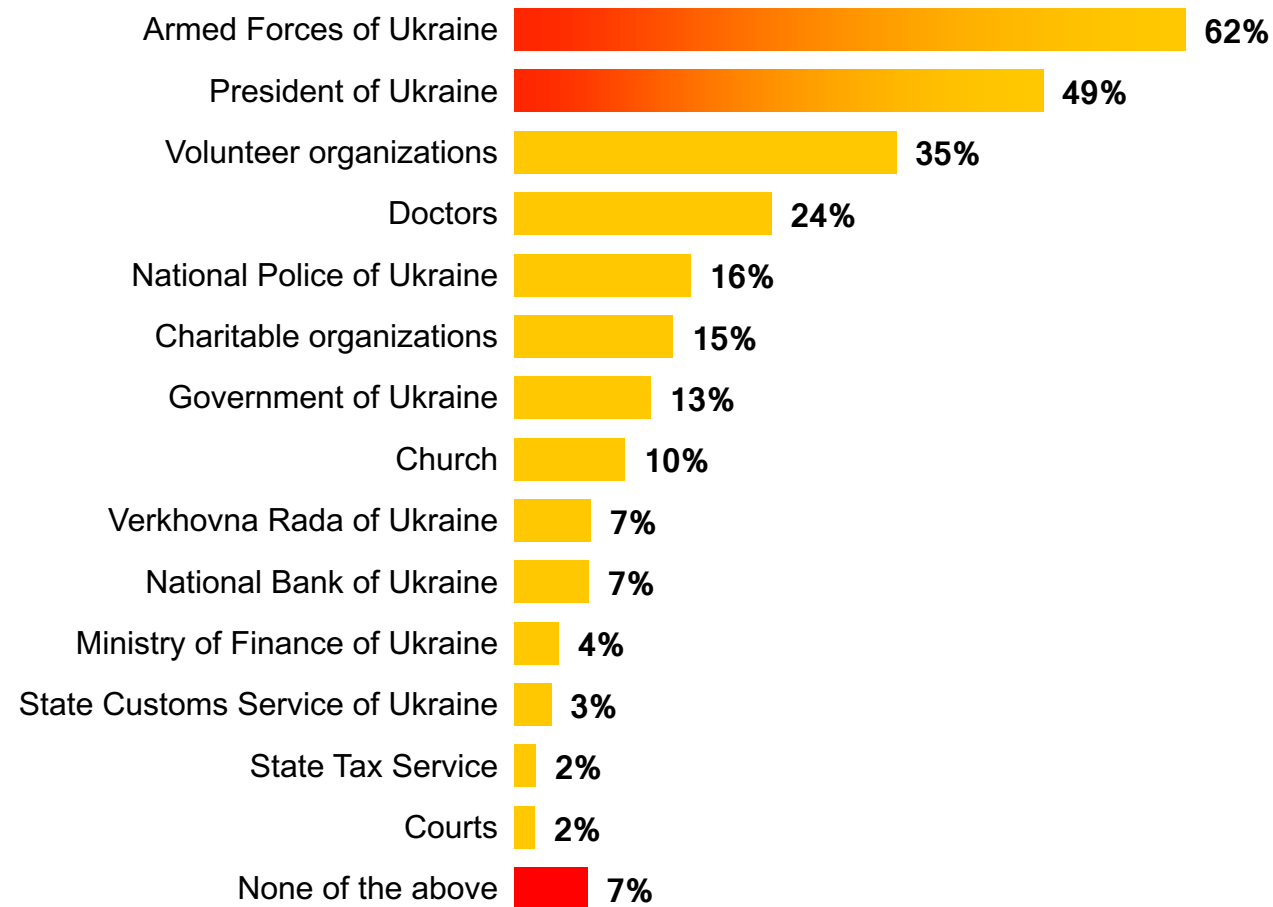


Base: all respondents, N = 2083

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 / with regard to regulation of the economy during the war / with regard to aiding citizens of Ukraine who lost property during the war / with regard to aiding citizens of Ukraine who lost their jobs or income during the war?

TRUST IN INSTITUTIONS

The most trusted institutions are the Armed Forces of Ukraine, the President of Ukraine, and volunteer organizations.



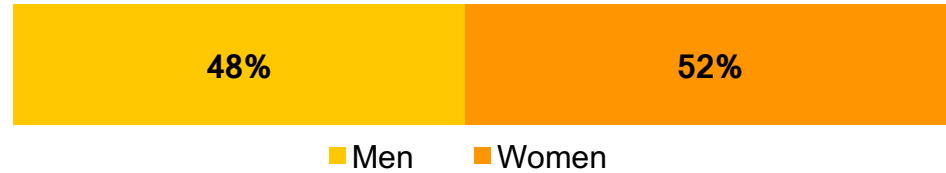


SAMPLE STRUCTURE

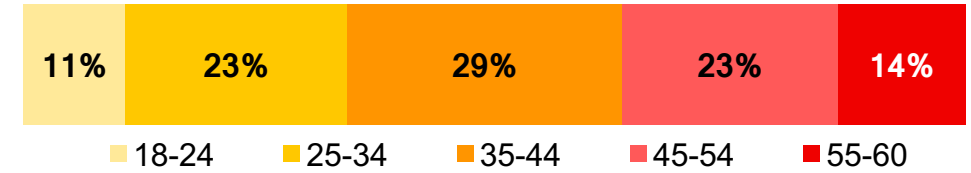


SAMPLE STRUCTURE

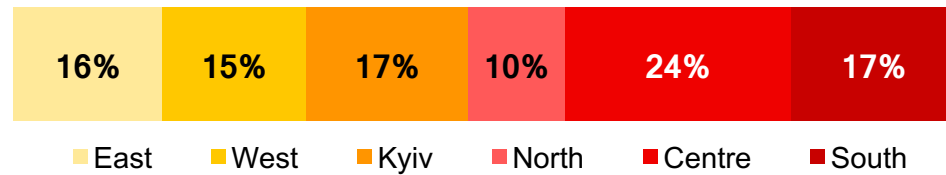
Gender



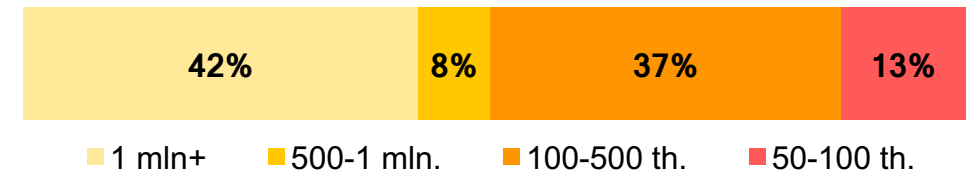
Age



Region (before the war)



Size of settlement



Income level



°Gradus

Research
Company

