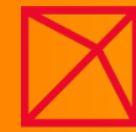




Centre for
Economic
Recovery



Advanter

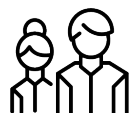
MIGRATION AND SOCIO-POLITICAL CLIMATE DURING THE FULL-SCALE WAR OF RUSSIA AGAINST UKRAINE – the second wave of the study

Analytical report

June 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 lived in Ukrainian cities with a population of 50 thousand and more at the moment when the war began.



Number of successful interviews:

I wave – 2083,
II wave – 2045.



Field period of the survey:

I wave – May 20 - May 22
II wave – June 3 – June 6.

CONCLUSIONS (1/2)

Ukrainians' actions during the war

- **The migration status of Ukrainians* remains unchanged:** 64% of respondents remain at their permanent places of residence (this is especially true for residents of the Western and Central regions - 80% and 79%); the rest (36%) of the audience changed their place of residence. Among those who migrated, 13% have already returned home (mostly Kyiv residents and residents of the North – 23% and 25%), and 23% continue to be far from home (mostly residents of the East – 59%).
- Compared to the first wave, **the share of those who want to move abroad in case the situation aggravates has decreased** (from 12% to 10%), while the share of those who want to stay at their current place of residence or move within Ukraine remained unchanged at 56% and 21%, respectively.
- The distribution of answers about the **possibility of relocation in case of aggravation** also remains unchanged: 46% of respondents say they do not have the opportunity to change their place of residence, while 47% do have such an opportunity (29% within the country and 18% – abroad).
- **Among those currently abroad**, the share of those who have not yet decided whether to return home increased significantly (from 11% to 25%). The share of those who want to return home as soon as possible (65%) has, on the other hand, remained without significant changes; the same is true of those who want to stay in another country (8%). The distribution of answers about the possibility of staying abroad has not changed significantly as well: 58% have such an opportunity, while 24% do not have it, and will return home at the first opportunity.
- The figures showing **willingness of internal migrants to return home** as soon as it is safe have not changed: 80% of them want to return home, and 11% - to stay at the new place. The distribution of the opportunity to stay at the new place has also remained unchanged: 40% have such an opportunity, while 48% do not.

CONCLUSIONS (2/2)

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

- **Money and access to work remain the biggest needs** Ukrainians* currently have, with 65% and 38% of respondents saying so. The second wave saw a decrease in declared needs depending on migration status and region. In particular, those who stayed at home were less likely to report a need for money (from 68% to 64%), internal migrants were less likely to report a need for access to health care (from 21% to 8%), and external migrants were less likely to report a need for housing (from 30% to 19%).
- **Physical health of Ukrainians* is still considered by them to be rather poor:** only 41% of the audience say that they have no health issues. At the same time, the assessment of mental health has improved compared to the first wave: the share of those who report the absence of any problems has increased significantly (from 38% to 41%).
- The share of Ukrainians* who did not receive **humanitarian aid from the Ukrainian government** decreased significantly (from 71% to 68%); the share of those who did receive it in the second wave was 29%. The most common forms of assistance received by people are money (72%) and food (43%). The assessment of sufficiency of the aid remains unchanged: 43% consider it sufficient and 50% – insufficient.
- The volume of **humanitarian aid received from the countries where external migrants went** is growing (insignificantly, as of yet) – from 54% to 60%. The form of assistance also remains unchanged: mainly food, money, hygiene items, clothing, and temporary housing. The assessment of this assistance as sufficient has also increased from 75% to 83% (not enough for it to be significant as well).

Perception of the full-scale war with Russia

- **The assessment of the effectiveness of the Ukrainian government during the full-scale war remains high.** At the same time, some of the figures have decreased – namely, the assessment of the government's actions since the beginning of the full-scale invasion in general, as well as in the field of military protection and assistance to citizens who have lost their property. The assessment of economic regulation and assistance to citizens who have lost their jobs remains unchanged: assistance to citizens (both those who have lost their property and those who have lost their jobs) remains the most "problematic" area of activity of the Ukrainian government – only about a third assess the government's actions in this area as effective.
- **The Armed Forces and the President of Ukraine remain most trusted institutions** – 63% and 48% of Ukrainians * trust in them, respectively. Trust in charities is growing. Ukrainians* have the lowest level of trust in financial institutions such as the National Bank of Ukraine, the Ministry of Finance of Ukraine and the State Tax Service, as well as in judicial and customs systems



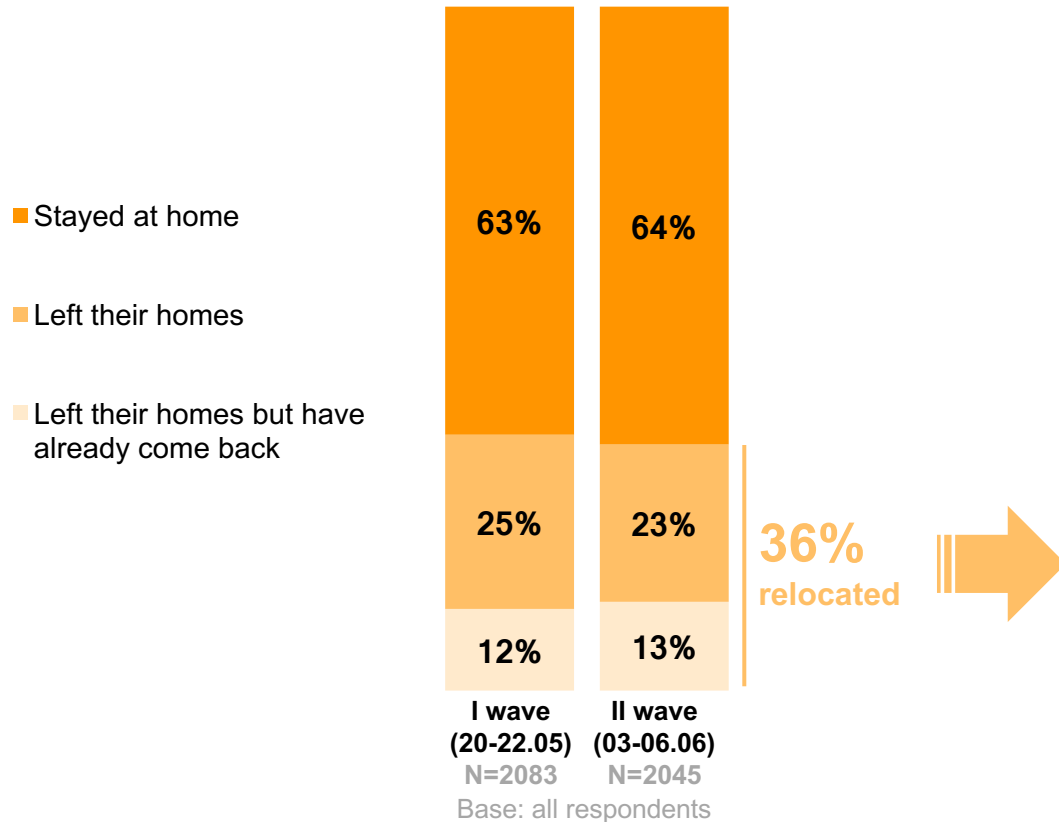
UKRAINIANS'* ACTIONS DURING THE WAR

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

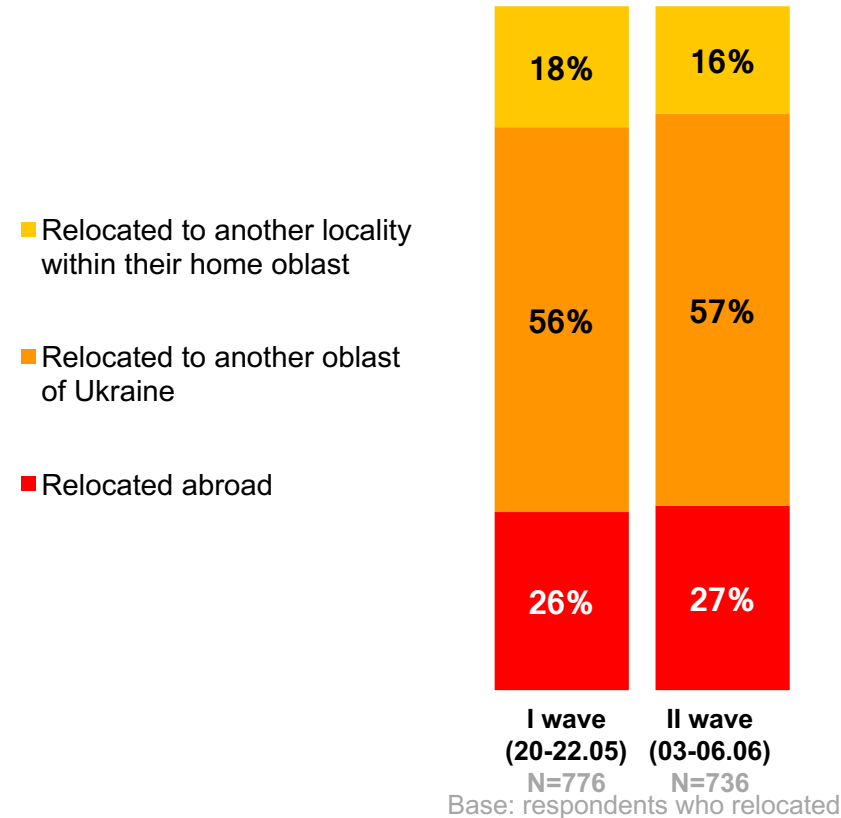
RELOCATION OF UKRAINIANS* DUE TO THE WAR

In the second wave, situation with regard to migration remains unchanged – the vast majority (64%) of Ukrainians* have remained at their place of residence since the full-scale war had begun; the rest of the audience (36%) have changed their place of residence, with 13% of them having already returned home. Those who relocated mostly went to another oblast of Ukraine (57%) or abroad (27%); less than a quarter (16%) of respondents migrated within their oblast.

Relocation of Ukrainians* due to the war



Relocation specifics



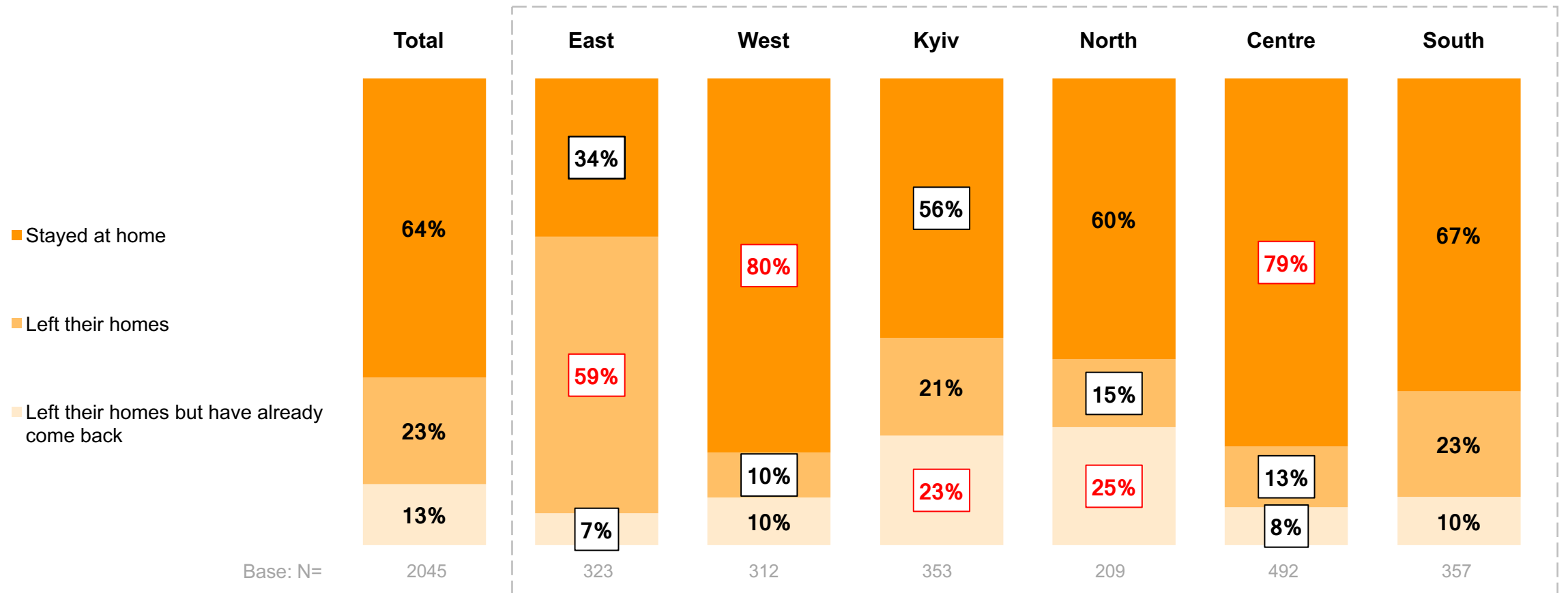
*Ukrainians - residents of cities with population of 50 thousand and more, aged 18-60 years, who use smartphones
 Which of the following phrases best reflects your actions in the situation of Russia's war against Ukraine:
 In which direction were you forced to move:

RELOCATION DUE TO THE WAR

by region



Region-wise, there is no significant difference between waves of study. Residents of the Eastern region are more likely to have left their homes, while residents of the Western and Central 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 a group, compared to the sample as a whole

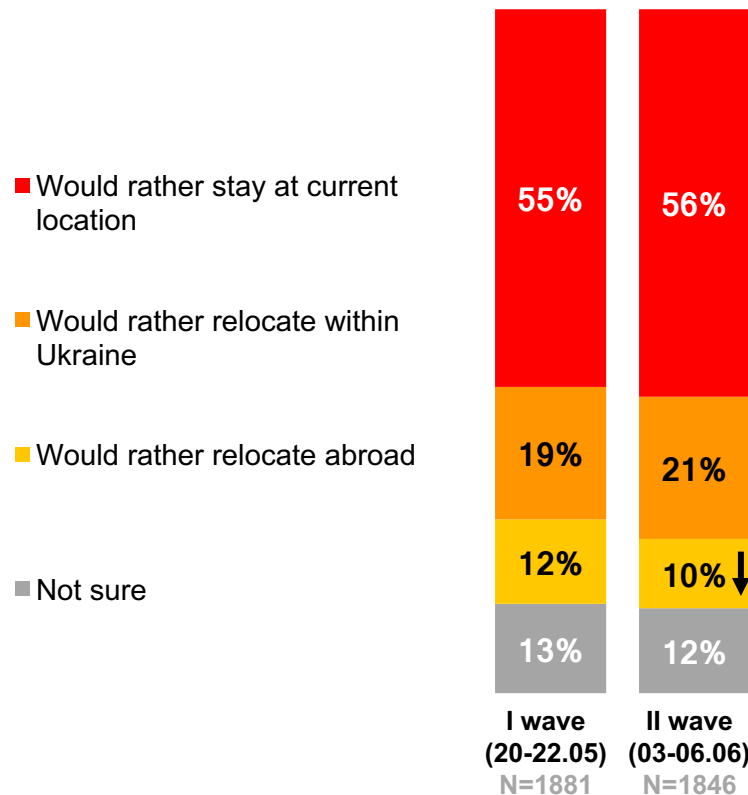
↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

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

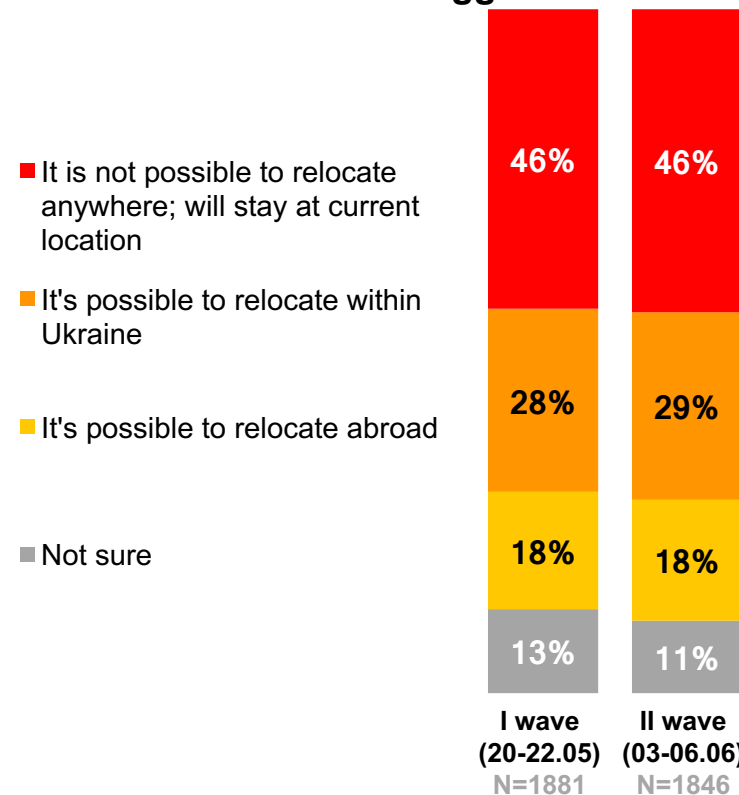
In comparison with the previous wave, share of respondents who remained in Ukraine and would rather relocate abroad in case of aggravation of the situation became smaller – from 12% to 10%. There are no changes in the share of those who want to stay at their current place of residence (56%) or to relocate within Ukraine (21%). Indicated possibility to relocate further away in case of aggravation of the situation also remains unchanged: respondents equally report both possibility and impossibility of relocation - 47% and 46%, respectively. Among those who have the opportunity to relocate, 29% are able 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



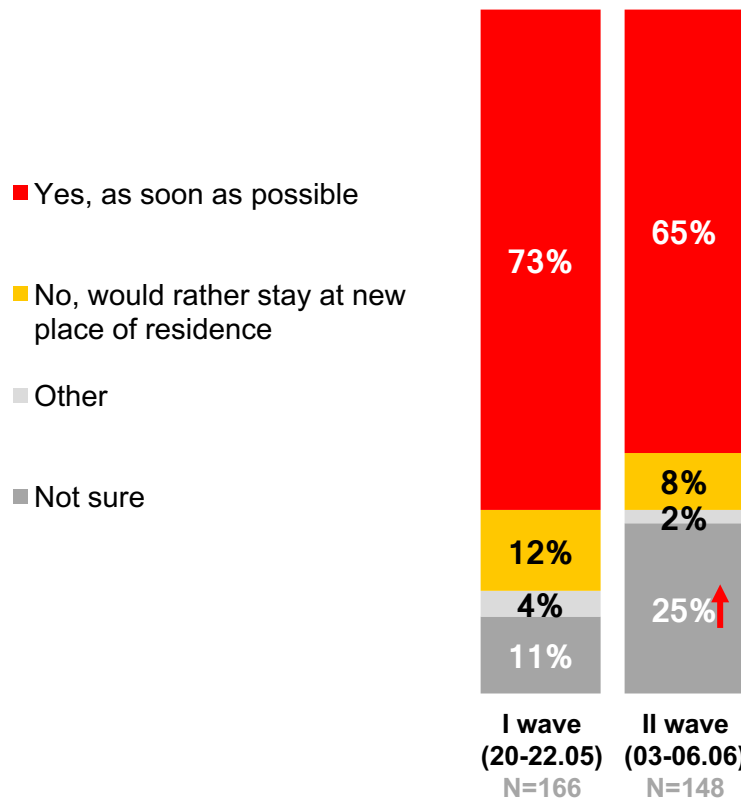
↓↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

Base: respondents who those stayed at home or relocated within Ukraine
 In case of further exacerbation, would you rather relocate further away, go abroad or stay where you are now?
 In case of further exacerbation, is it possible for you to relocate further away, go abroad or stay where you are now?

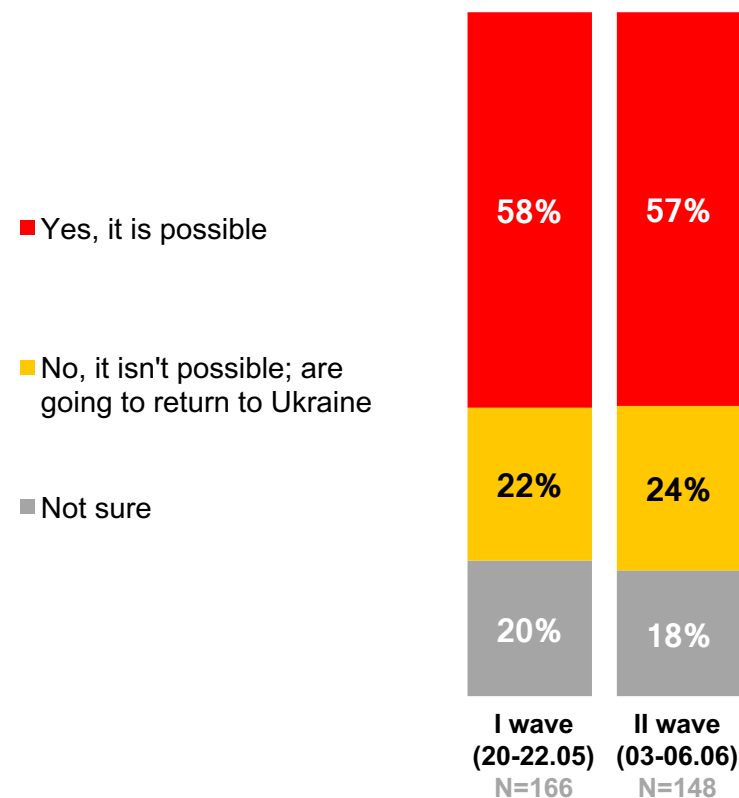
WISHES REGARDING COMING BACK FROM ABROAD. POSSIBILITY OF STAYING THERE

Compared to the previous wave, the share of those who relocated abroad and have not yet returned to Ukraine but seek to return as soon as possible has not changed significantly and is at 65%. The situation is similar for those who want to stay at the new place of residence - 8%. The share of those who did not decide whether they want to return from abroad increased significantly from 11% to 25%. Also, the distribution of answers to the question about the possibility of staying abroad remained unchanged: more than half (57%) of respondents have such an opportunity, while 24% speak of its absence.

Wishes regarding coming back from abroad



Possibility of staying abroad



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

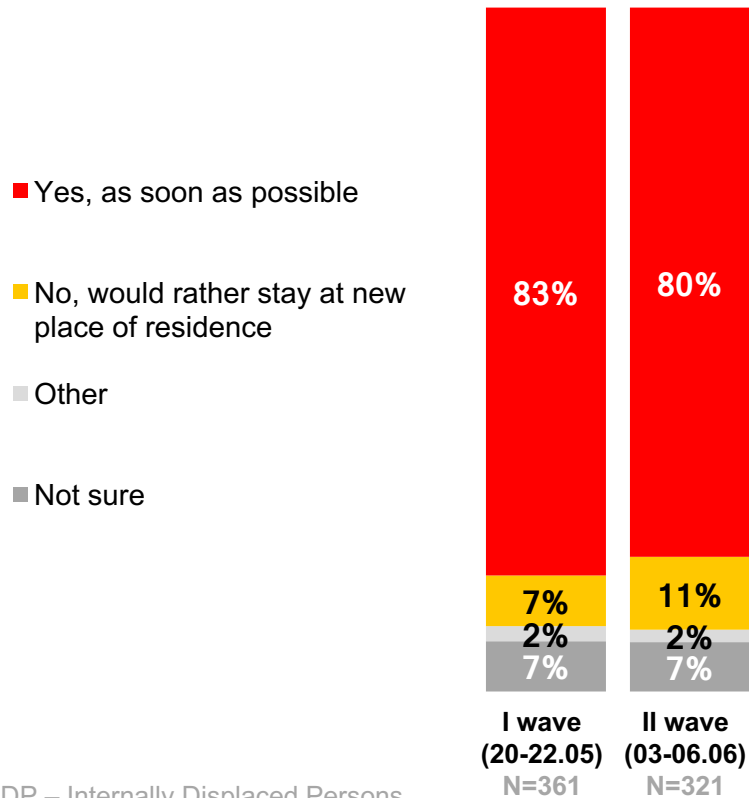
Base: respondents who relocated abroad and have not come back yet
Do you want to return to Ukraine?
Is it possible for you to stay abroad?

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

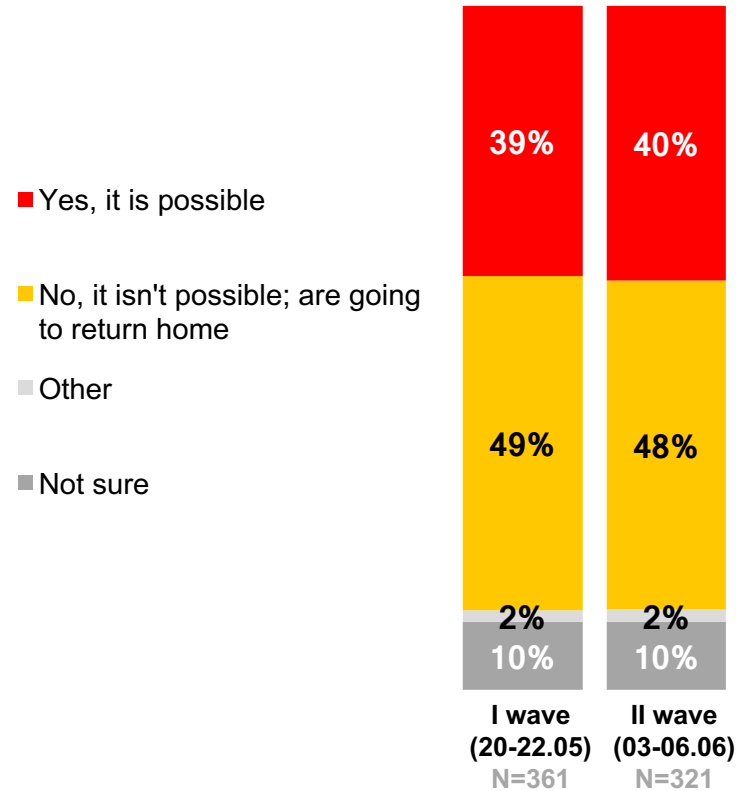


The distribution of IDPs'* responses to the question about the desire to return home has not changed: the vast majority (80%) of respondents want to return home as soon as possible if the hostilities there are over, while 11% want to stay at the new place. Also, the declaration of the possibility to stay at the new place of residence remains unchanged: 40% have such an opportunity, while 48% do not have it.

Wishes regarding coming back home



Possibility of staying at the new place



*IDP – Internally Displaced Persons

Base: respondents who relocated within Ukraine and have not come back yet

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

Is it possible for you to stay at your new place of residence if/when the hostilities at your permanent place of residence are over?

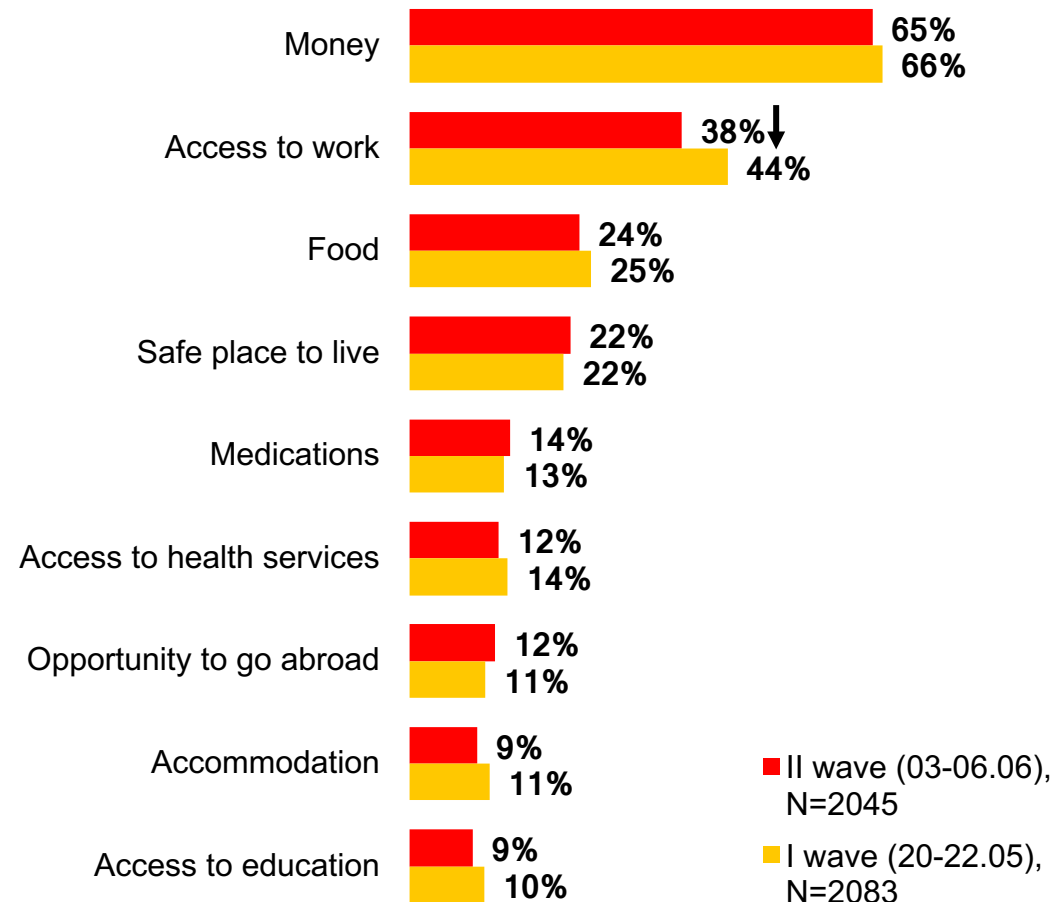


EFFECT OF THE FULL- SCALE WAR ON UKRANIANS'* LIVES

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

THINGS THAT ARE NEEDED MOST

Money and access to work remain the things that respondents need the most - 65% and 38%, respectively. At the same time, respondents now need access to work somewhat less compared to the previous wave (the figure decreased from 44% to 38%); the needs for the other things remained without significant changes.

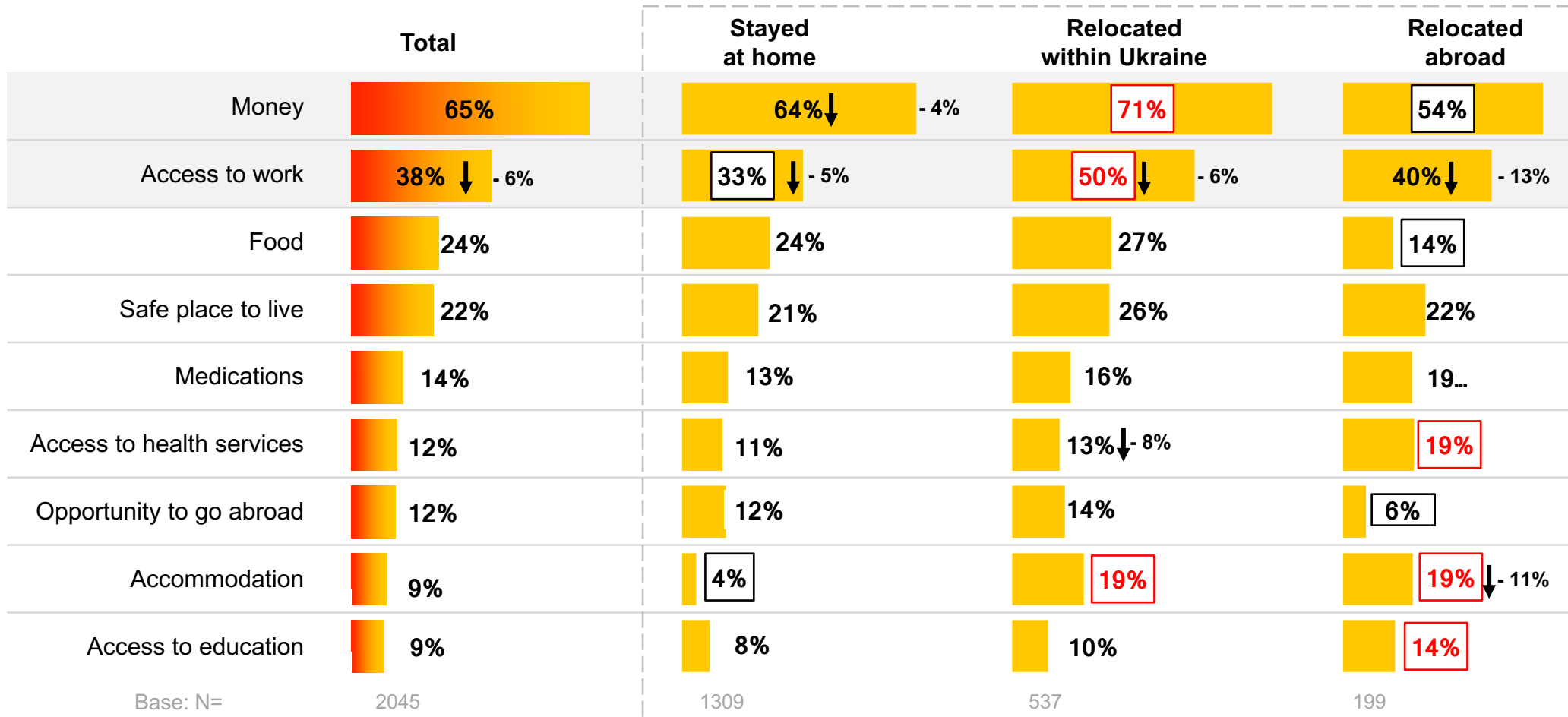


↓↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

FAMILIES' NEEDS

by migration status

In the second wave there is a decrease in the share of those in need of access to work among all groups. Among those who stayed at home, the share of people in need of money also decreased. Internal migrants are less likely to need access to health services, and external migrants are less likely to need housing, compared to the first wave.



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

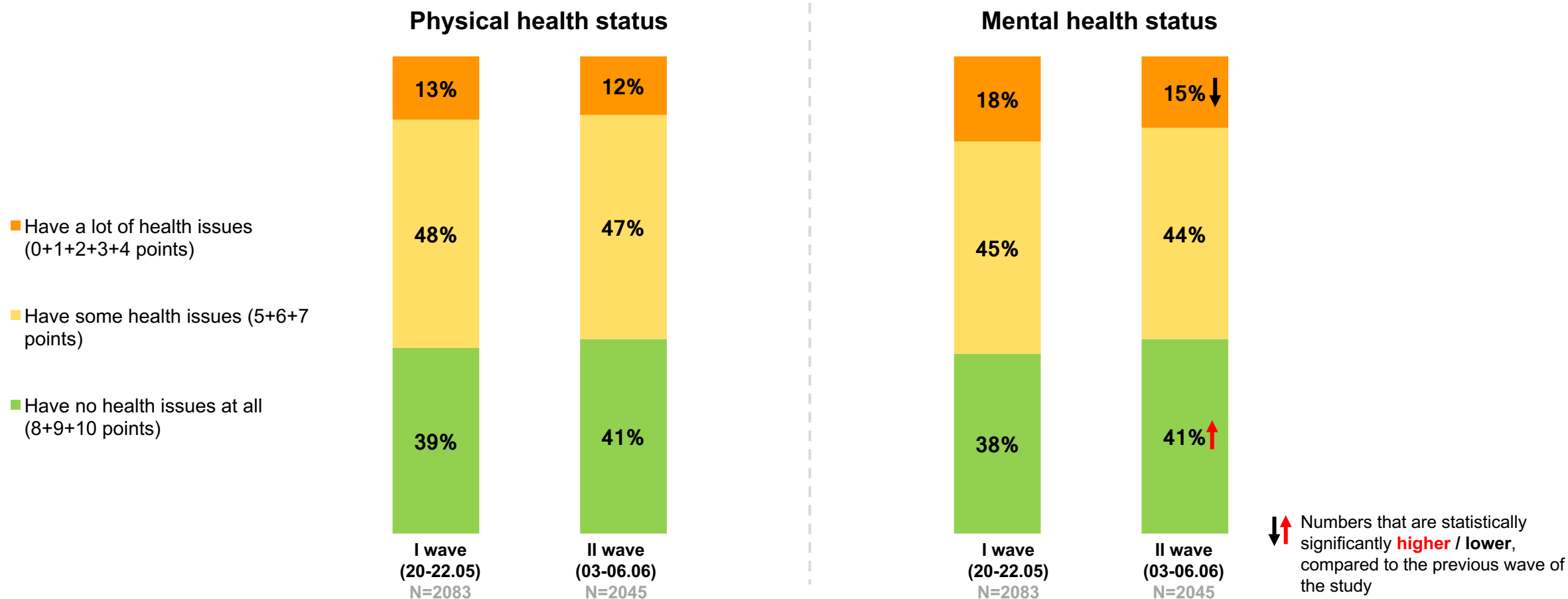
Numbers that are statistically significantly higher / lower for the group, compared to the sample as a whole

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

SUBJECTIVE ASSESSMENT OF HEALTH

Assessment of physical health, compared to the previous wave, remained unchanged: about half (47%) of respondents have some problems, 41% do not have them, and 12% - have many problems (according to their own declaration).

When it comes to assessing mental health, in the second wave the share of those who report lack of problems significantly increased (from 38% to 41%), and the share of those who have many problems decreased (from 18% to 15%). According to their own estimates, 44% of respondents have some mental health problems.



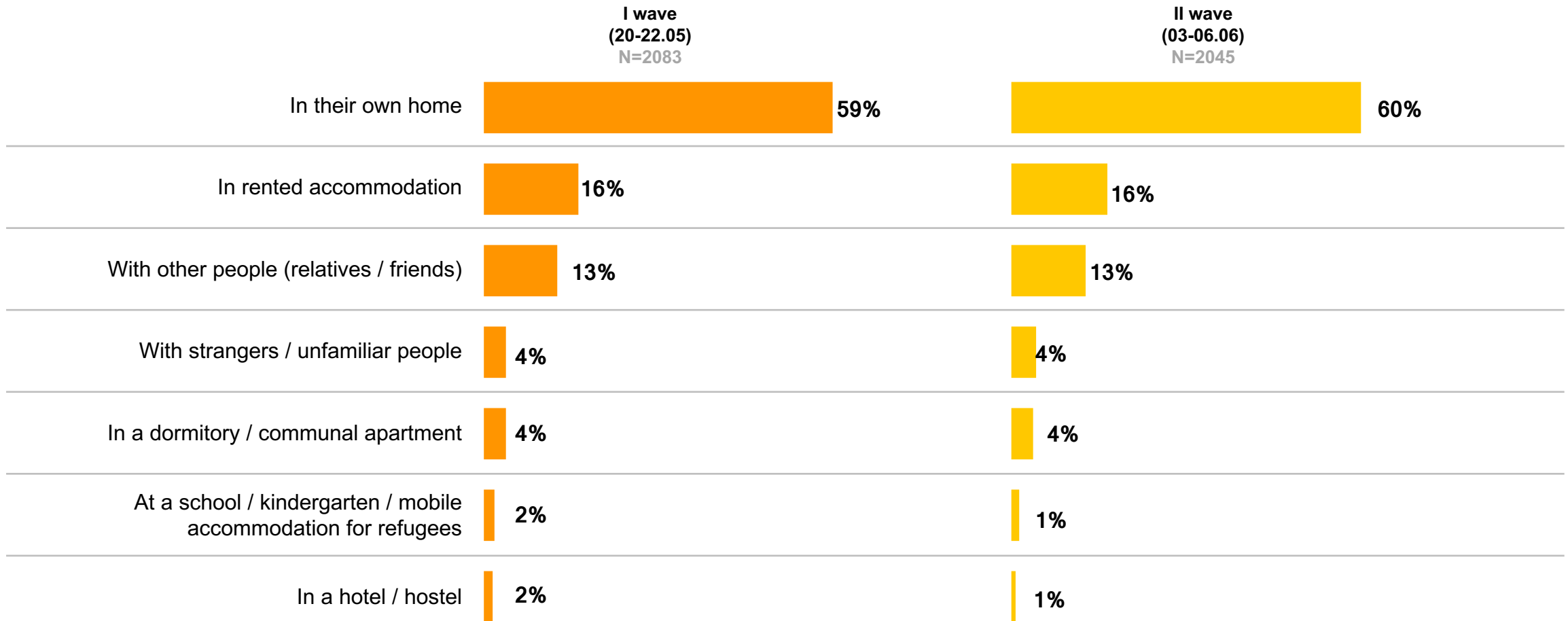
Base: all respondents

Please assess the state of your physical health on a scale of 0 to 10, where 0 means 'I have a lot of physical health issues' and 10 means 'I have no physical health issues at all'.

Please assess the state of your mental health on a scale of 0 to 10, where 0 means 'I have a lot of mental health issues' and 10 means 'I have no mental health issues at all'.

CURRENT RESIDENCE

The vast majority of respondents (60%) continue to live in their own homes. Living in rented accommodation (16%) and with other people such as friends and relatives (13%) are also common ways of living during the war. No significant differences compared to the previous wave have been found.

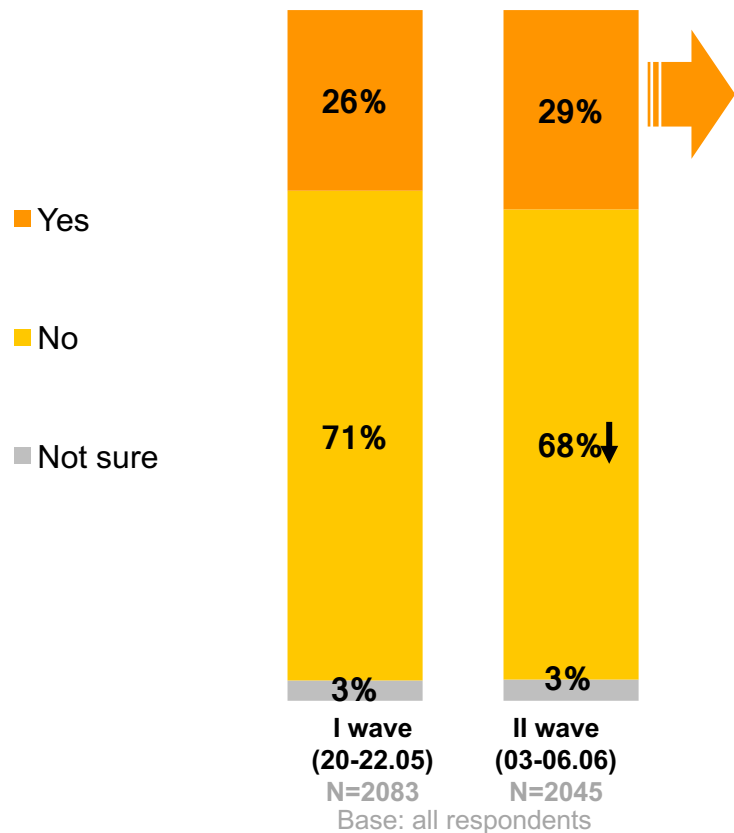


↓ ↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

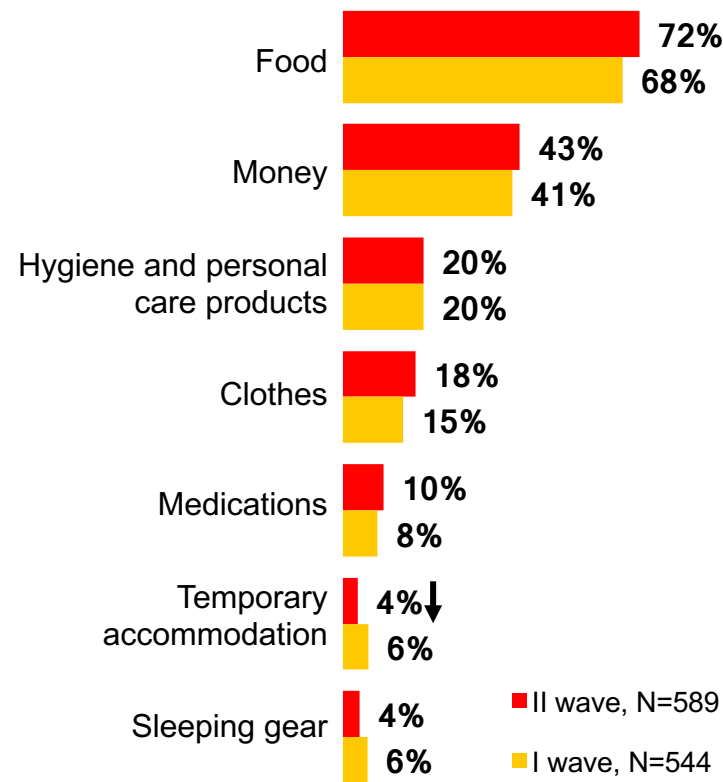
HUMANITARIAN AID FROM THE UKRAINIAN GOVERNMENT

Compared to the previous wave, the share of those who did not receive humanitarian aid from the Ukrainian state decreased significantly (from 71% to 68%), and the share of those who received it increased slightly, but insignificantly (from 26% to 29%). The most common forms of this aid are food, money, hygiene products and clothes; temporary accommodation has become significantly less likely to be received as an assistance than in the previous wave (from 6% to 4%). The assessment of sufficiency of the humanitarian aid from the Ukrainian state remains unchanged: 43% consider it sufficient, and 50% - insufficient.

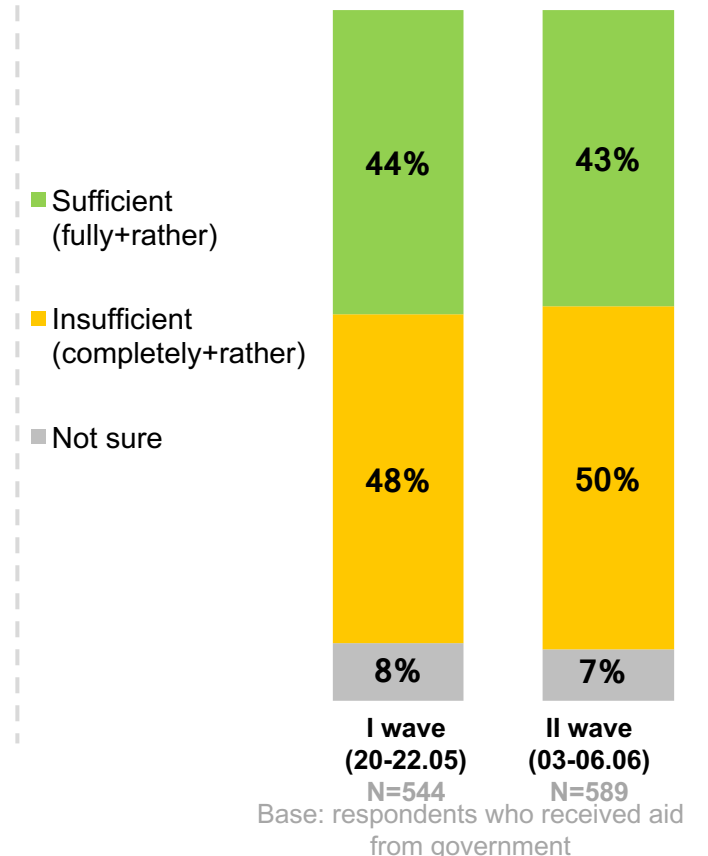
Reception of humanitarian aid from the government



Type of humanitarian aid



Sufficiency of the humanitarian aid



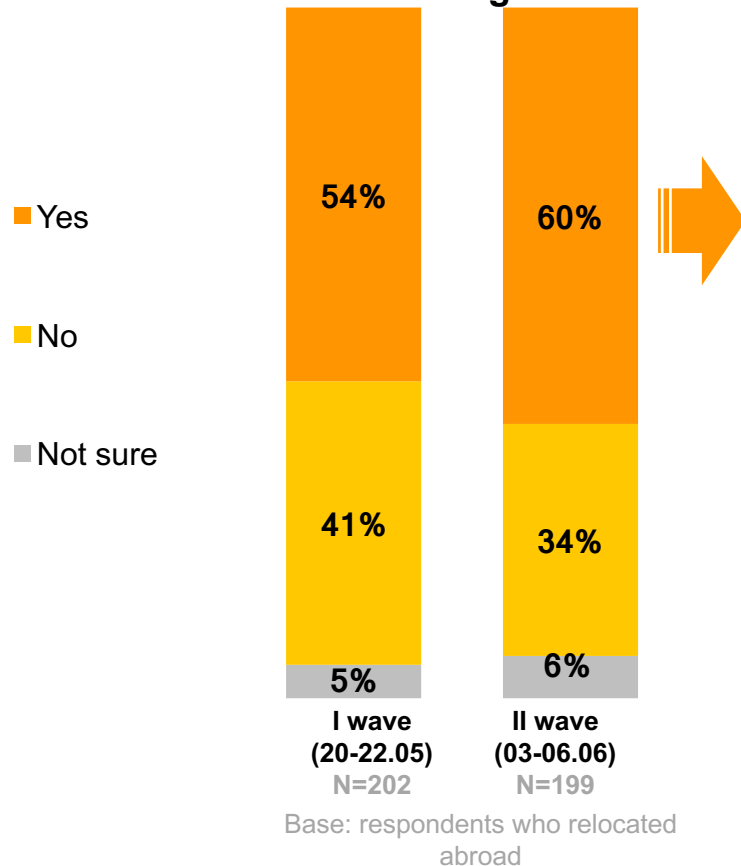
Have you or your family received humanitarian aid from the Ukrainian government?
 What kind of humanitarian aid did you or your family receive from the Ukrainian government?
 How would you assess the humanitarian aid provided to you or your family by the Ukrainian government?

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

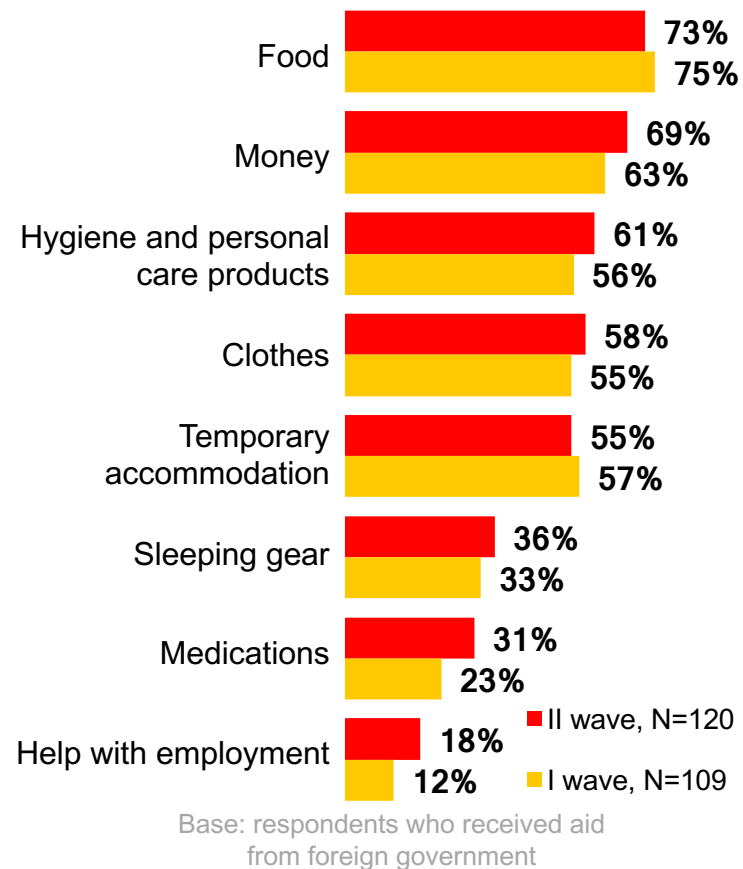
HUMANITARIAN AID FROM THE FOREIGN GOVERNMENT

The volume of humanitarian aid received from the countries where external migrants went is growing (insignificantly, as of yet) – from 54% to 60%. The form of assistance also remains unchanged: mainly food, money, hygiene items, clothing, and temporary housing. The assessment of this assistance as sufficient has also increased from 75% to 83% (not enough for it to be significant as well).

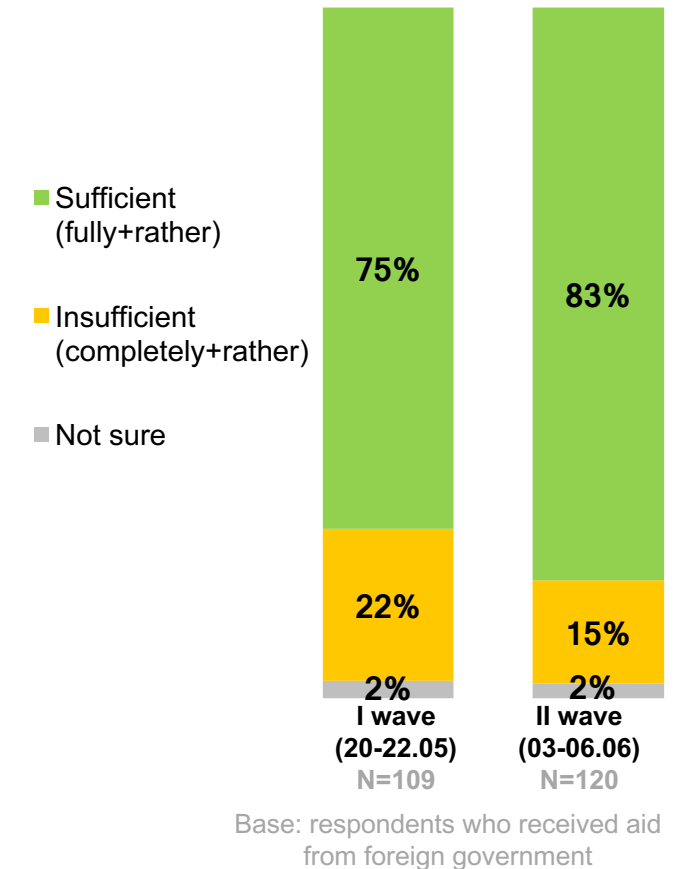
Reception of humanitarian aid from the government



Type of humanitarian aid



Sufficiency of the humanitarian aid



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?

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



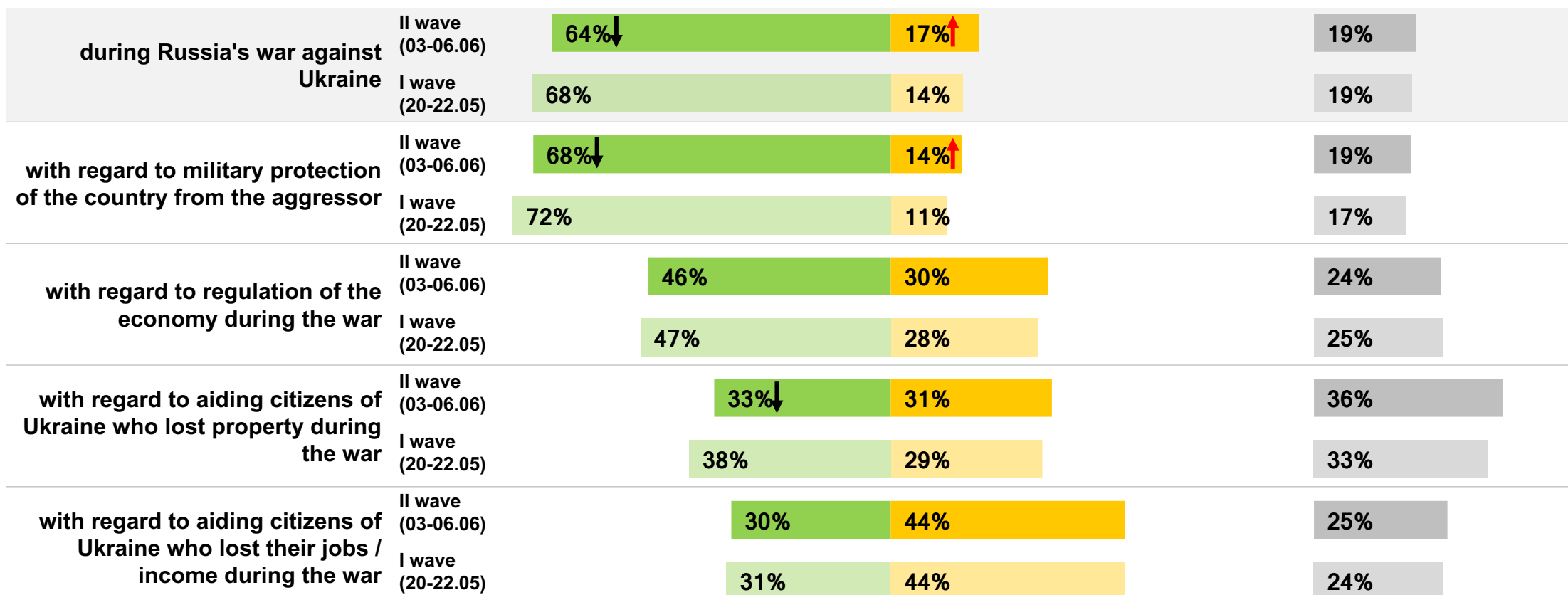
PERCEPTION OF THE FULL-SCALE WAR WITH RUSSIA



EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES...

The second wave saw a significant drop in the assessment of how effective the Ukrainian authorities' actions have been since the beginning of the war in general, as well as in the field of military protection of the country from the aggressor and helping those who lost property as a result of the war. There have been no significant changes in the assessment of the government's actions to regulate the economy and help those who lost their jobs and income during the war. At the same time, there is a negative trend when it comes to figures for such categories as age, migration status and region; residents of the North are the only category of respondents that rated the government's effectiveness at a higher level than during the previous wave: their assessment of unemployment assistance increased by 10 percentage points and is currently at 33%.

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



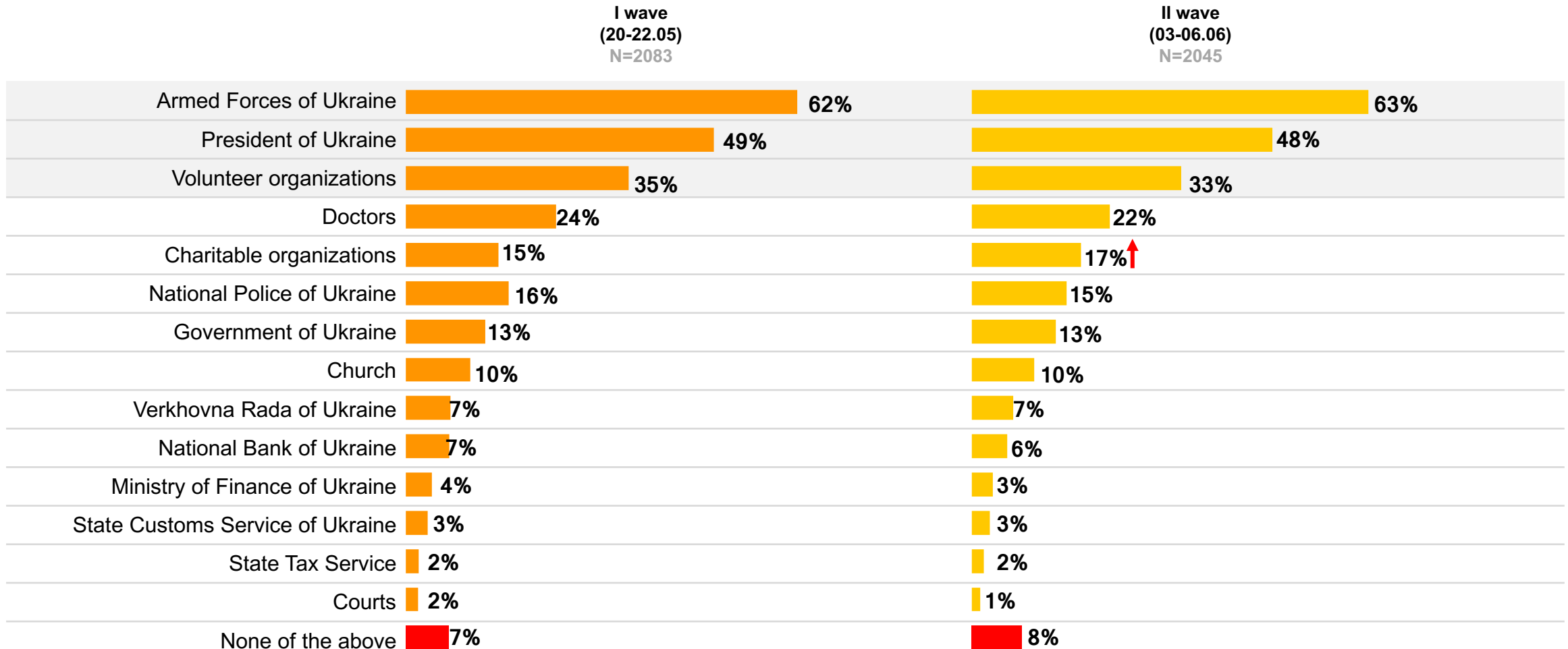
Base: all respondents; 1st wave - N = 2083, 2nd wave - N = 2045

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?

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

TRUST IN INSTITUTIONS

Ukrainians* trust the Armed Forces, the President, and volunteer organizations the most. Compared to the previous wave, the trust in charitable organizations has grown.



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

Base: all respondents

Which of the following institutions do you trust?

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

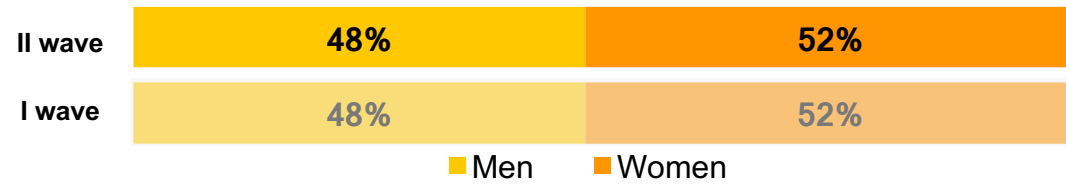


SAMPLE STRUCTURE

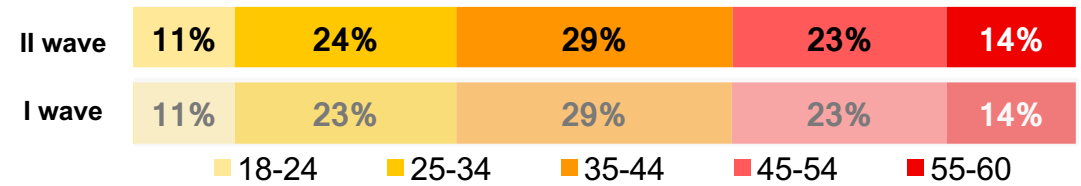


SAMPLE STRUCTURE

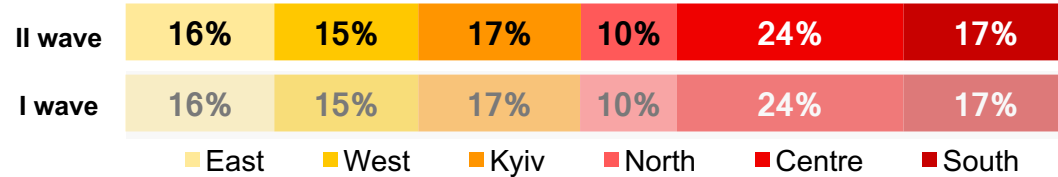
Gender



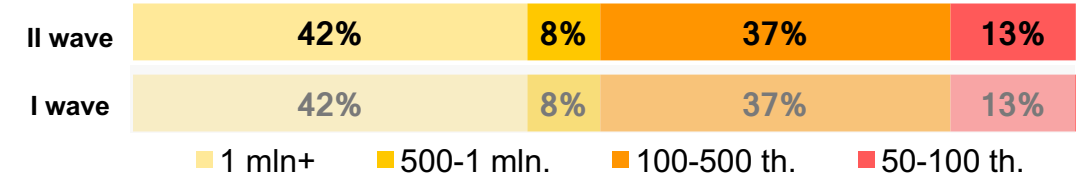
Age



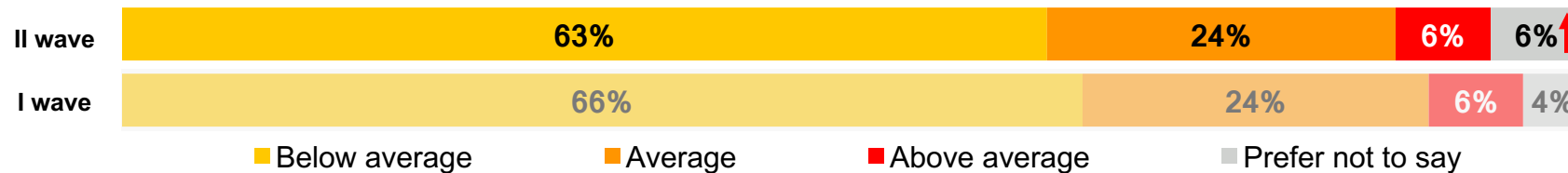
Region (before the war)



Size of settlement (before the war)



Income level



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

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