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

Analytical report

June 2022

*«This publication was produced with the financial support of the European Union. Its contents are the sole responsibility of Centre for Economic Recovery, NGO and Gradus Research; and do not necessarily reflect the views of the European Union».



MOVING FORWARD
TOGETHER



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:

1st wave – 2083,
2nd wave – 2045,
3rd wave – 2008.



Field period of the survey:

1st wave – May 20 - May 22
2nd wave – June 3 – June 6
3rd wave – June 17- June 20.

CONCLUSIONS (1/2)

Ukrainians' actions during the war

- **The migratory status of Ukrainians* remains unchanged:** 64% of respondents **remain at their permanent places of residence** (this is especially true for residents of the Central, Western, and Southern regions - 82%, 81% and 72%, respectively); the rest (36%) of the audience **changed their place of residence**. Among **those who migrated**, 15% **have already returned home** (mostly Kyiv residents and residents of the North – 27% and 33%), and 21% **continue to be far from home** (mostly residents of the East – 56%).
- Compared to the second wave, the share of those who stayed in Ukraine and want to **move in case the situation aggravates** remains unchanged: 56% **want to stay at their current location**, 21% **want to move within Ukraine**, and 11% - **move abroad**. The distribution of answers about the **possibility of relocation in case of aggravation** also remains unchanged: 44% of respondents say they do not have the opportunity to change their place of residence, while 47% do have such an opportunity (27% within the country and 20% – abroad).
- Among those currently abroad, the share of those who **have not yet decided whether to return home** declined significantly (from 25% to 15%). The share of those who **want to return home as soon as possible** (68%) has, on the other hand, remained without significant changes; the same is true of those who **want to stay in another country** (15%). The distribution of answers about the possibility of staying abroad has not changed significantly as well: 61% have such an opportunity, while 19% do not have it, and will return home at the first opportunity.
- Compared to the second wave, the share of internally displaced persons who have not yet **decided whether to return home** as soon as it becomes safe increased slightly (from 7% to 13%). The rest of the figures remained unchanged: 78% of them want to return home, and 8% want to stay at the new place. The share of those who hesitate to answer the question about the possibility of staying at the new place has also increased (from 10% to 20%). The rest of the figures remained with no significant changes: 33% have such an opportunity, while 46% 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 66% and 38% of respondents saying so. The third wave saw no significant changes in declared needs depending on migratory status.
- **Physical health of Ukrainians* is still considered by them to be rather poor:** only 40% of the audience say that they have no physical health issues, and 38% say they do not have any mental health issues; at the same time, about half of the audience say that there are some problems: 47% with physical and 45% with mental health, respectively.
- Compared to the second wave, the share of those who **received humanitarian aid from the Ukrainian government** has not changed and is currently at 28%. The most common forms of assistance received by people continue to be money (71%) and food (41%); at the same time, clothes began to be received less often than in the previous wave (from 18% to 12%). The assessment of sufficiency of the humanitarian aid received remains unchanged: 44% consider it sufficient and 45% – insufficient.
- The third wave saw a significant increase in the share of those who received **humanitarian aid from the country where they moved because of the war** (from 60% to 71%). Money, food, clothing, hygiene products and temporary housing remain the most commonly received items. The assessment of the aid provided by a foreign state as sufficient (79%) remained unchanged.

Perception of the full-scale war with Russia

- **The assessment of the effectiveness of the Ukrainian government during the full-scale war remains high.** The assessment of the government's actions since the beginning of the full-scale war in general, as well in terms of military protection, economic regulation, and assistance to citizens who have lost their homes and jobs, has remained unchanged. The last two areas still remain the most problematic areas of activity of the Ukrainian government – only about a third find the actions of the government in these areas to be effective.
- **The Armed Forces and the President of Ukraine consistently remain most trusted institutions** – 61% and 47% of Ukrainians * trust in them, respectively. Trust in other institutions also remains unchanged. 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.

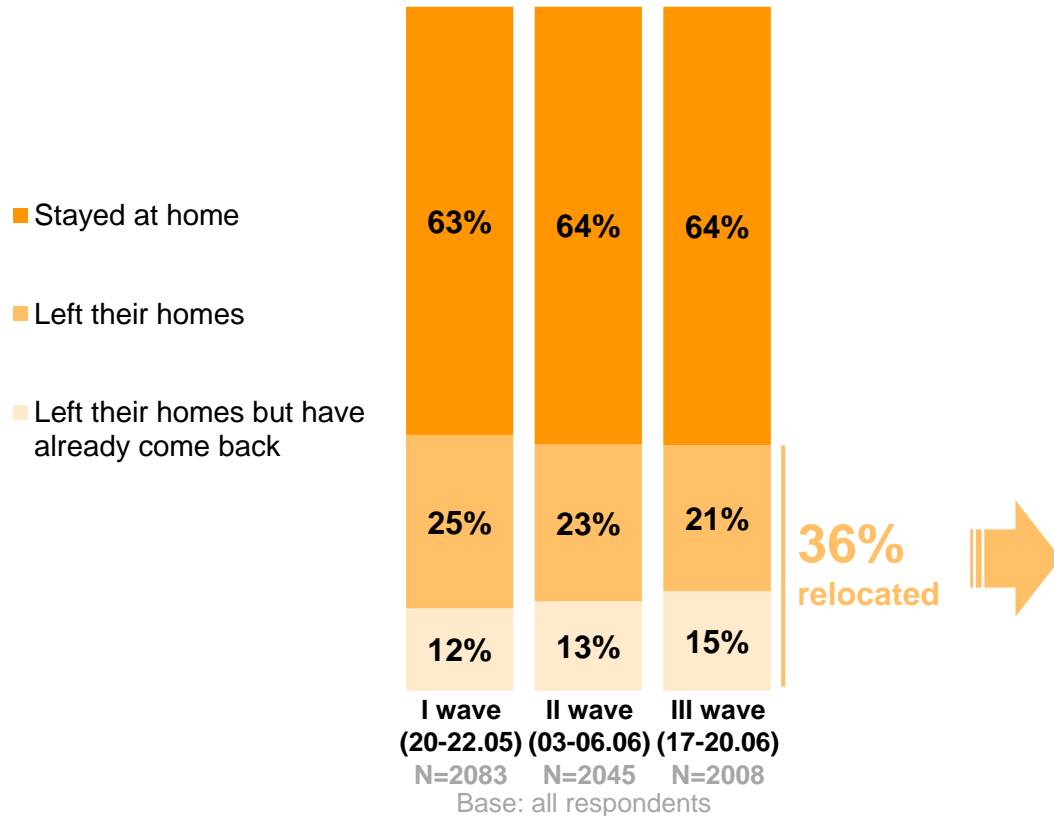
UKRAINIANS'* ACTIONS DURING THE WAR

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

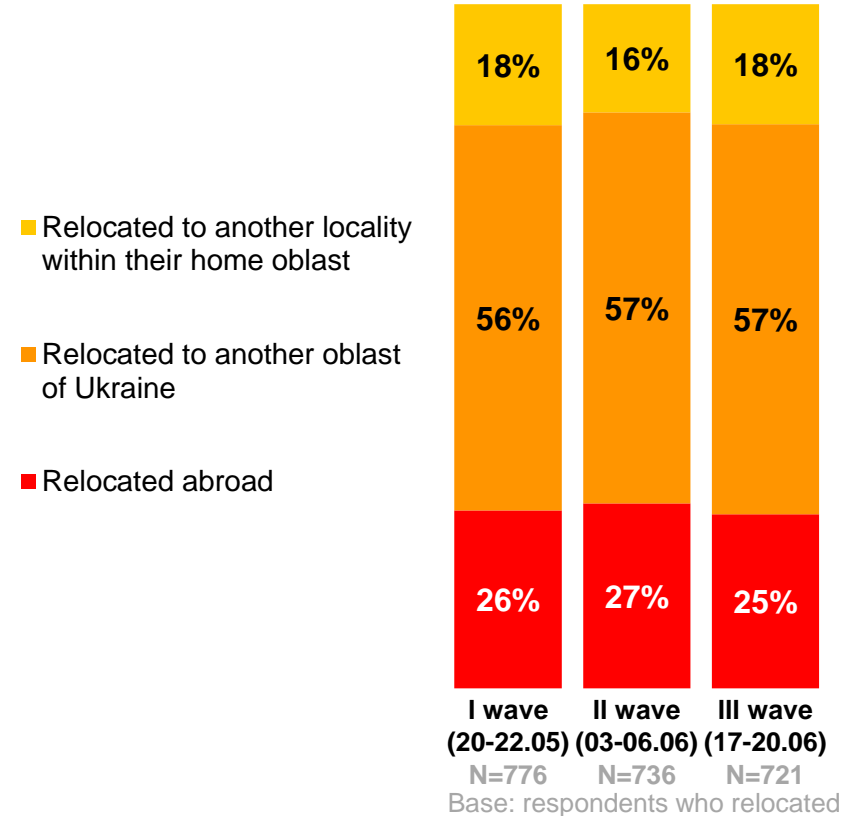
RELOCATION OF UKRAINIANS* DUE TO THE WAR

The situation with migration in the third wave remains unchanged - the vast majority (64%) of Ukrainians* have remained in their permanent place of residence since the beginning of the full-scale war between Russia and Ukraine; the rest of the respondents changed their place of residence - 36%, of which 15% have already returned home. Respondents most often went to other oblasts within Ukraine (57%) or abroad (25%); less than a quarter (18%) of respondents migrated within their oblast.

Relocation of Ukrainians* due to the war



Relocation specifics

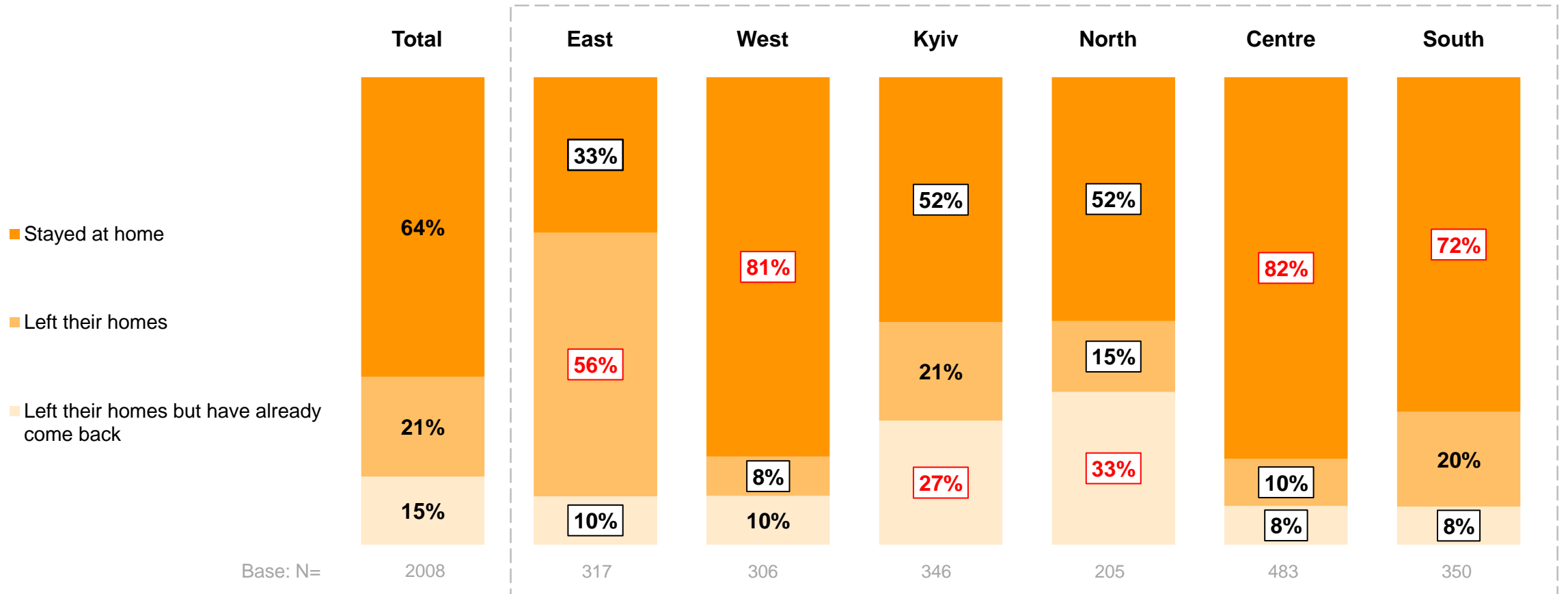


*Ukrainians - residents of cities with population of 50 thousand and more, aged 18-60 years, who use smartphones
 Which of the following phrases best reflects your actions in the situation of Russia's war against Ukraine:
 In which direction were you forced to move:


RELOCATION DUE TO THE WAR


by region

Region-wise, there were no significant differences in the third wave compared to the previous one. Residents of the Eastern region more often left their homes, while residents of the Western, Central and Southern regions, on the contrary, remained at their permanent place of residence. Kyiv residents and residents of the Northern region began to return home.



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

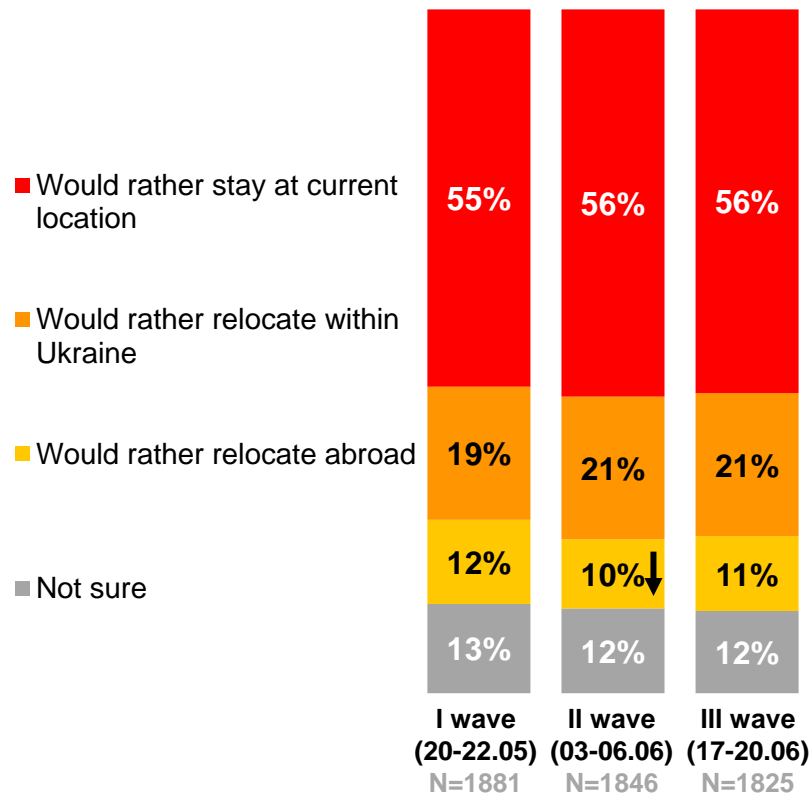
 Numbers that are statistically significantly **higher** / **lower** for a group, compared to the sample as a whole

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

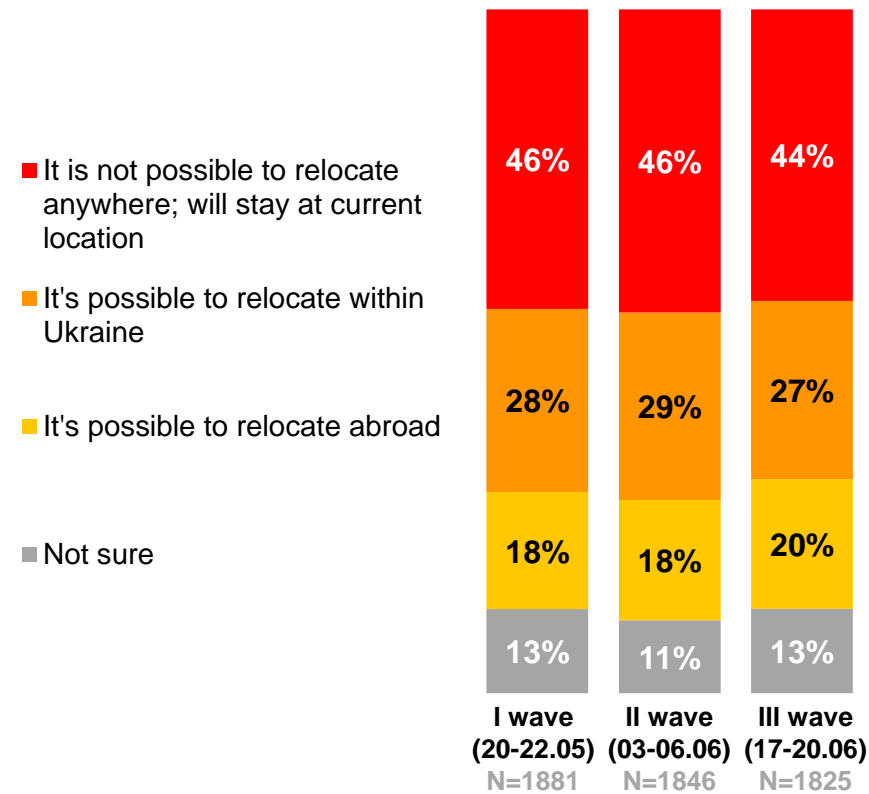
PREFERRED MODE OF ACTION IN CASE OF AGGRAVATION & OPPORTUNITY TO RELOCATE

The share of people who want to change their current location in case of aggravation remains unchanged compared to the previous wave: 56% will stay in place, 21% will move within Ukraine, and 11% want to move abroad. Also, in the third wave, the distribution of answers to the question about the possibility of relocation in case of aggravation of the situation has not changed: respondents equally declare both the availability of relocation opportunities and their absence - 47% vs 44%. Among those who have the opportunity to move, 27% can do so within Ukraine, and 20% can move abroad.

In case of aggravation of the situation would rather...



Possibility to relocate further away in case of aggravation of the situation



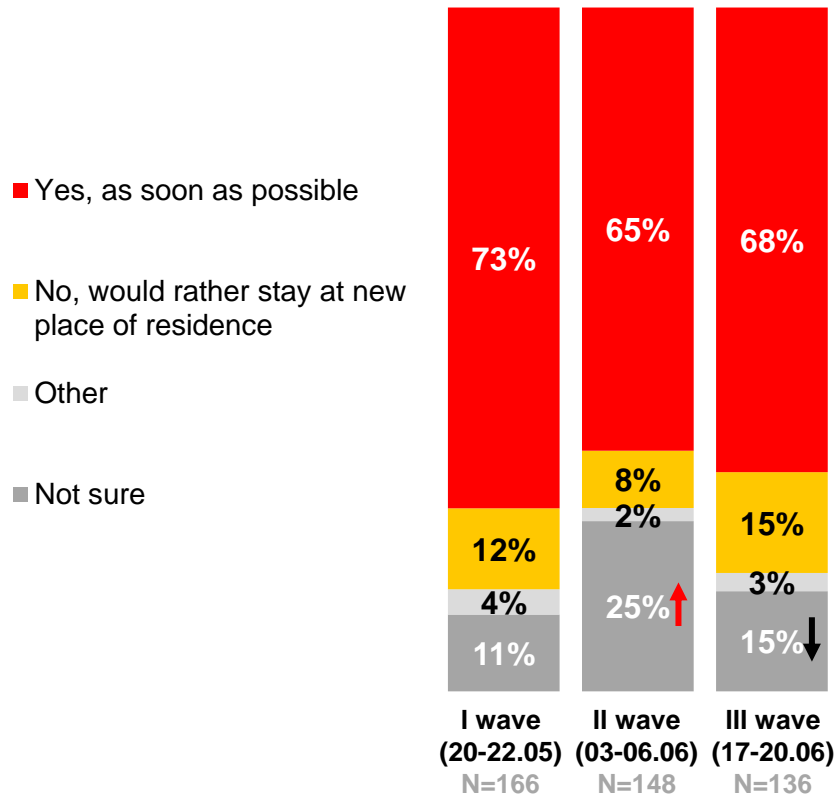
↓ Numbers that are statistically significantly higher / lower, compared to the previous wave of the study

Base: respondents who 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?

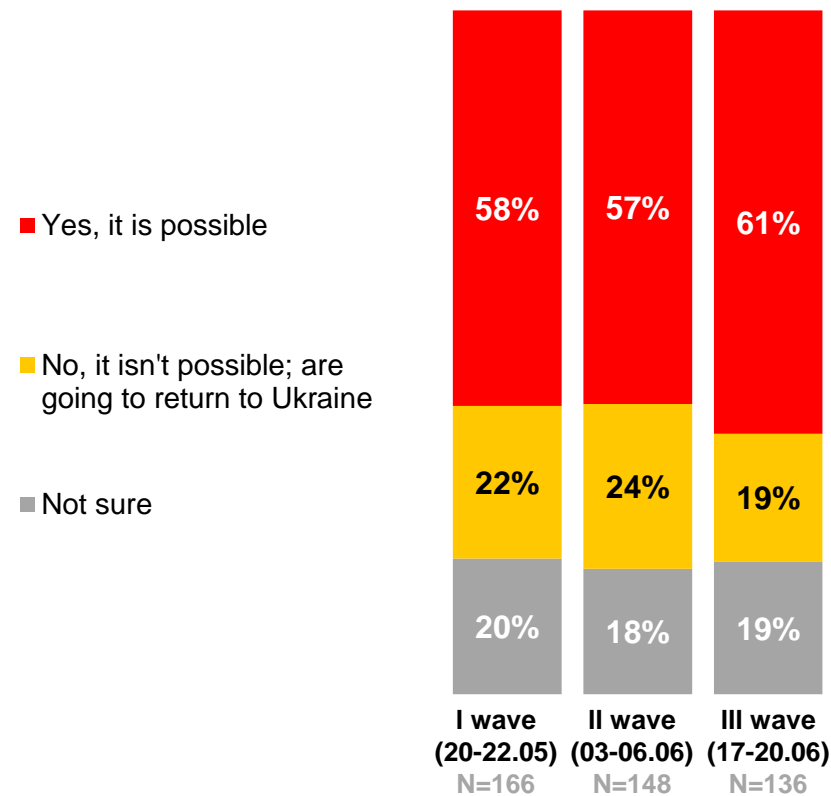
WISHES REGARDING COMING BACK FROM ABROAD. POSSIBILITY OF STAYING THERE

Compared to the second wave, the share of those who went abroad and have not yet returned to Ukraine but seek to return at the first opportunity remained unchanged and is at 68%. The situation is similar for those who want to stay at the new place of residence - 15%. The share of those who are undecided about whether they want to return from abroad decreased significantly - from 25% to 15%. The distribution of answers to the question about the possibility of staying abroad remained unchanged: more than half (61%) of respondents have such an opportunity, while 19% do not.

Wishes regarding coming back from abroad



Possibility of staying abroad



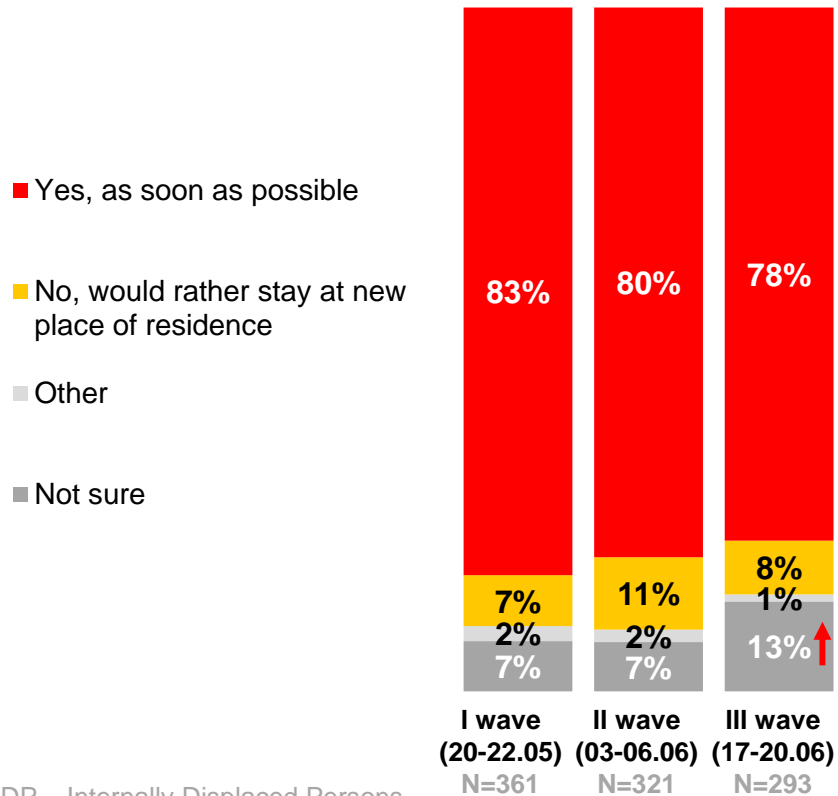
↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

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?

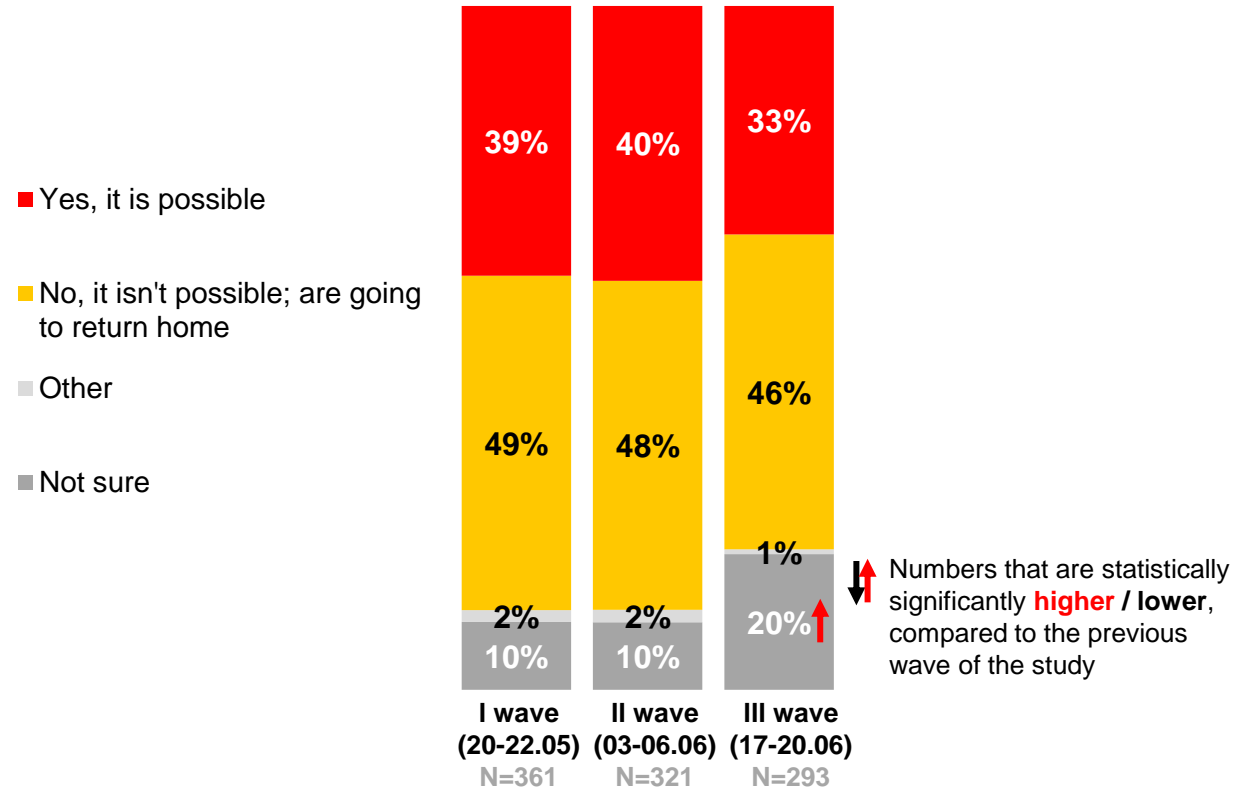
INTERNALLY DISPLACED PERSONS' WISHES REGARDING COMING BACK. POSSIBILITY OF STAYING WHERE THEY ARE

In the third wave, the share of internal migrants who have not yet decided whether to return home in the event of a cessation of hostilities there increased significantly (from 7% to 13%). At the same time, the distribution of answers among those who made a decision remains unchanged: 78% want to return home as soon as possible, while 8% want to stay at the new place. The share of those who are not sure of the possibility to stay at the new place has also increased significantly (from 10% to 20%), while the distribution of opportunities remained unchanged: 33% have them and 46% do not.

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?

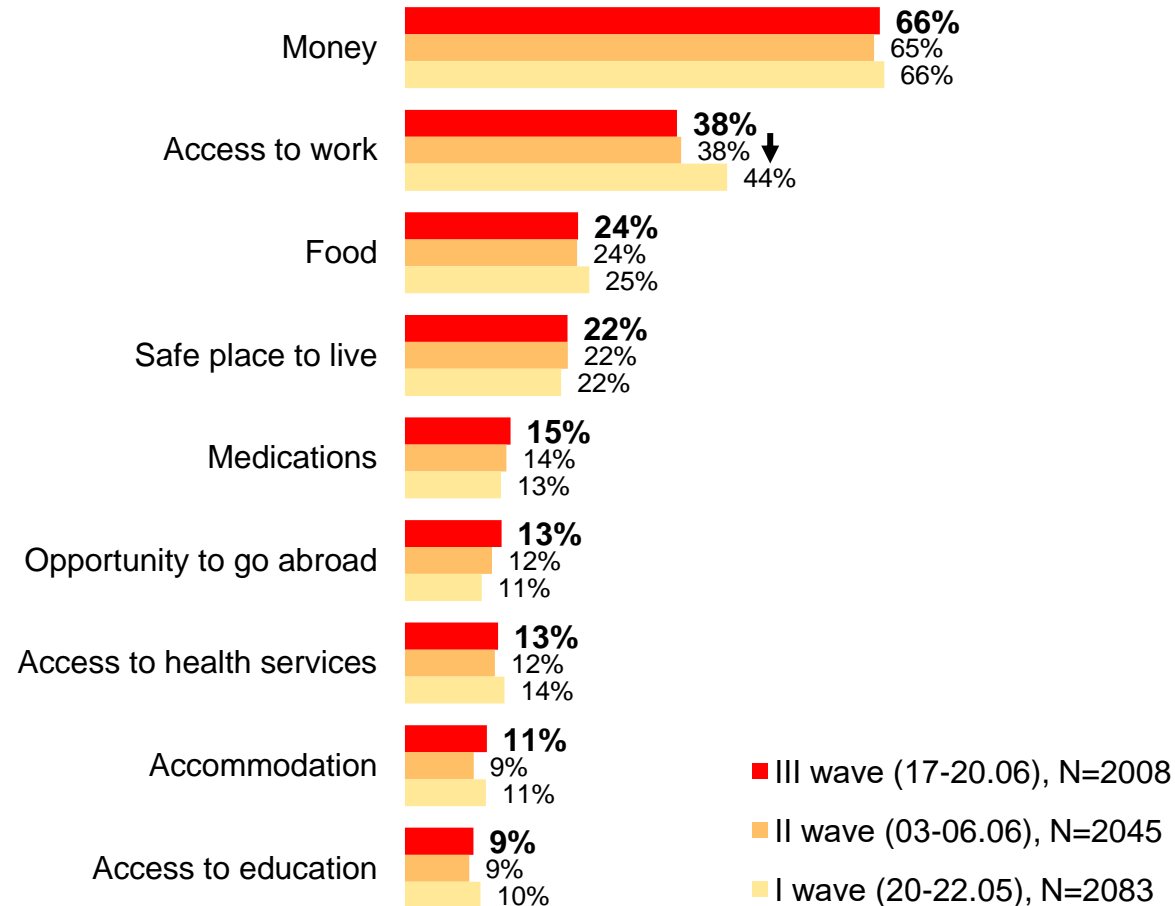
Is it possible for you to stay at your new place of residence if/when the hostilities at your permanent place of residence are over?



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 – 66% and 38%, respectively. There were no significant differences in the needs of respondents in the current wave compared to the previous one.

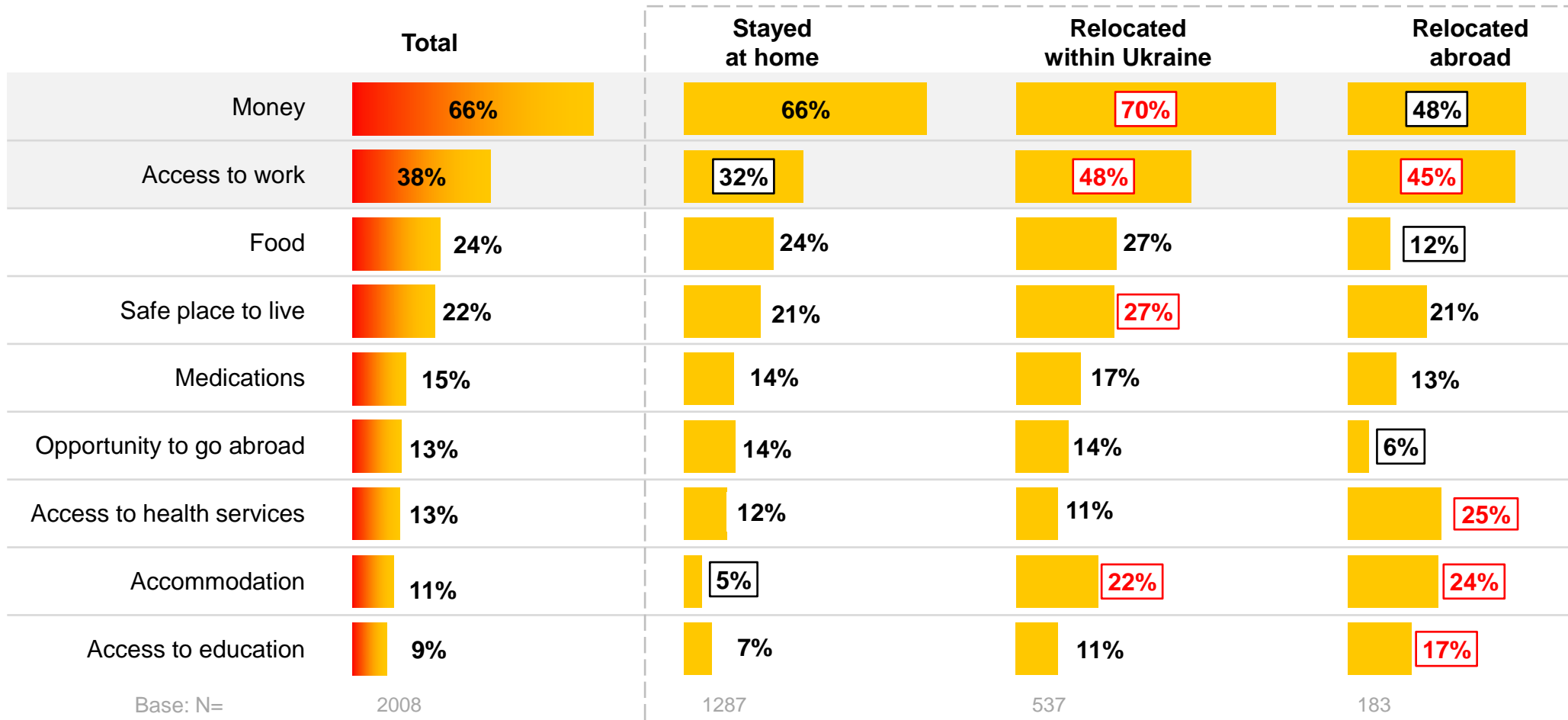




 Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study


FAMILIES' NEEDS


by migration status

There were no changes in needs depending on the migration status in the third wave compared to the previous one. Internal and external migrants are more likely to need certain things.



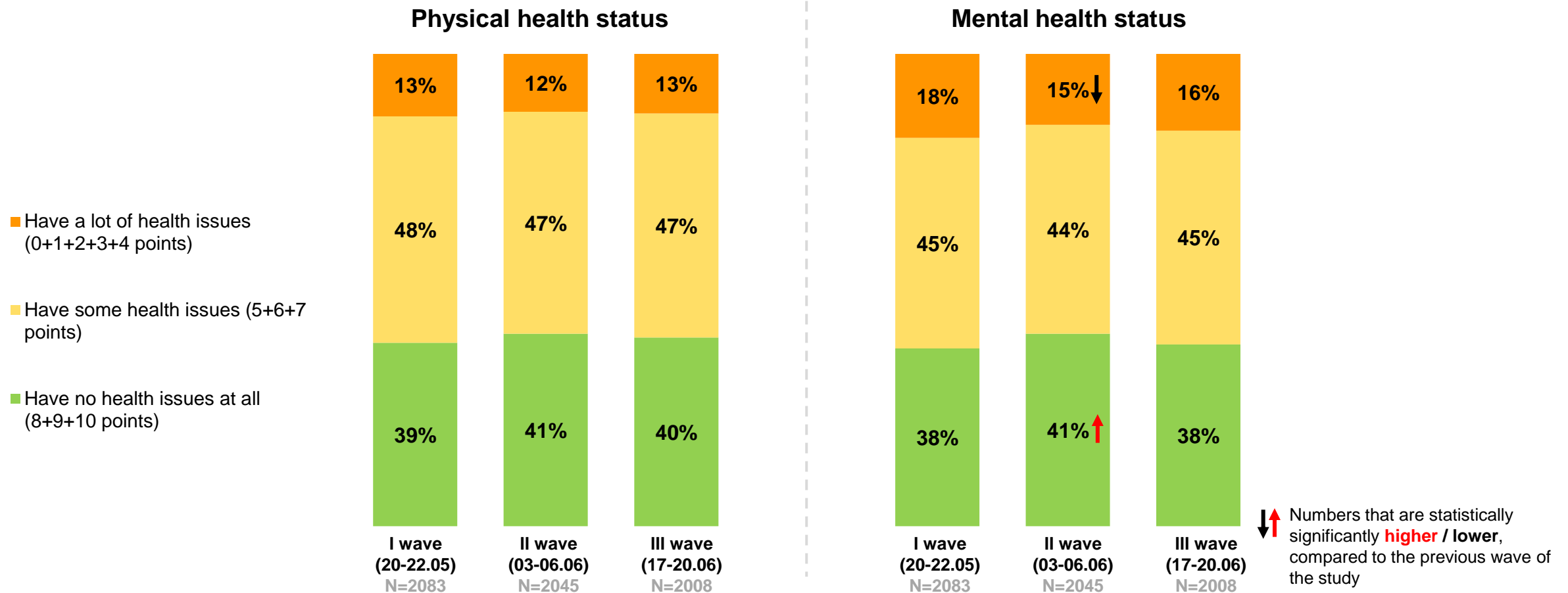
Base: all respondents
As of today, what do you or your family need most?

 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

Assessments of physical and mental health remained unchanged (compared to the second wave): about half (47% and 45%, respectively) of respondents have some problems, 40% and 38% claim to not have any, and 13% and 16% have many problems (according to their own declaration).



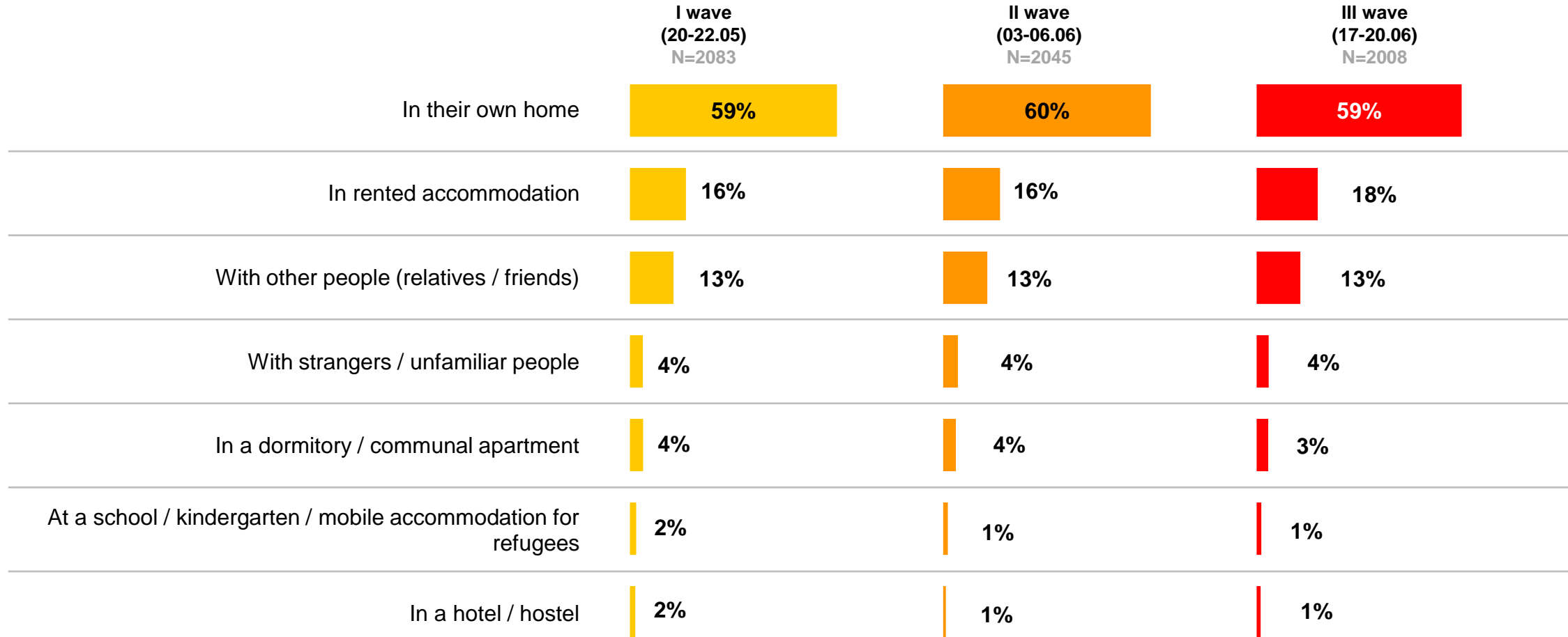
Base: all respondents

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 (59%) continue to live in their own homes. Other common places of residence include rented housing (18%) and homes of friends and relatives (13%). No significant differences compared to the previous wave have been found.

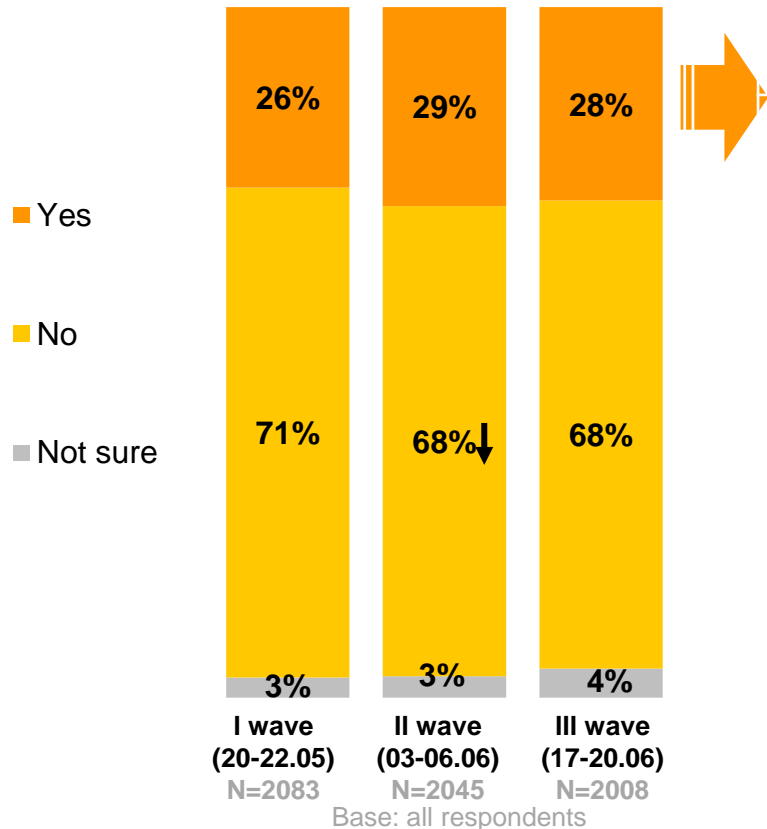


↓↑ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

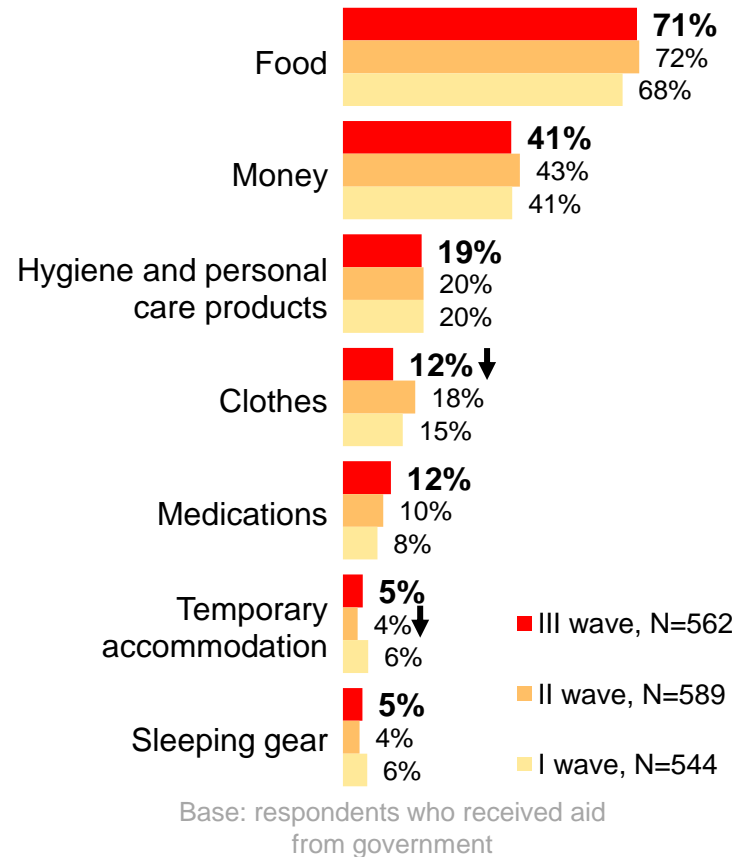
HUMANITARIAN AID FROM THE UKRAINIAN GOVERNMENT

Compared to the previous wave, the share of those who received humanitarian aid from the Ukrainian state has not changed and is currently at 28%. The most common forms of this assistance continue to be food, money and hygiene items; at the same time, clothes began to be received less often than in the previous wave (from 18% to 12%). The assessment of sufficiency of the humanitarian aid received remains unchanged: 44% consider it sufficient and 45% – insufficient.

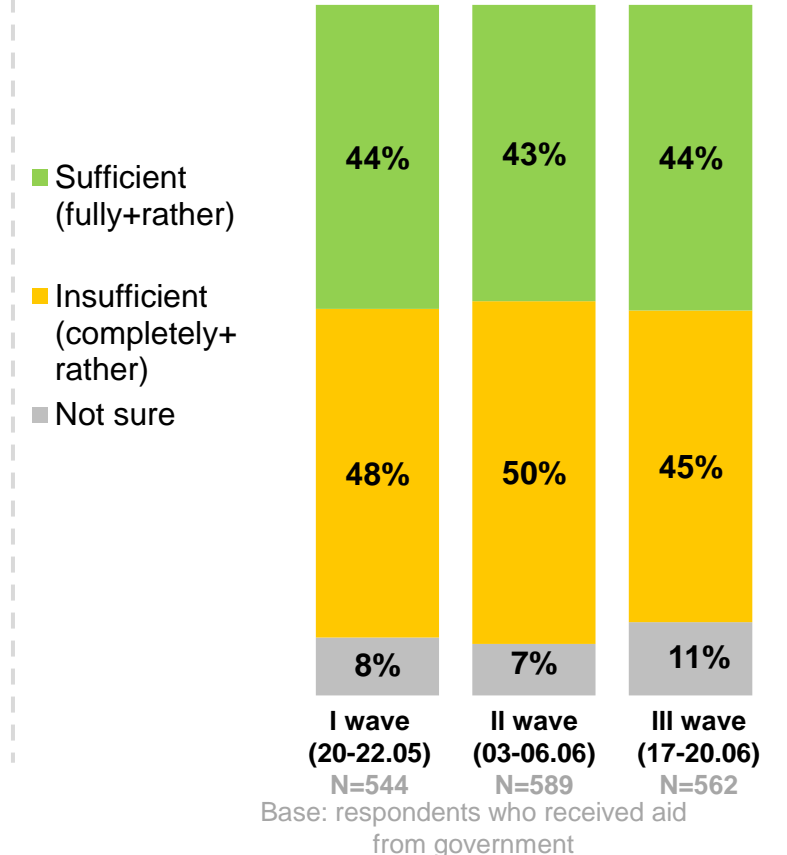
Reception of humanitarian aid from the government



Type of humanitarian aid



Sufficiency of the humanitarian aid



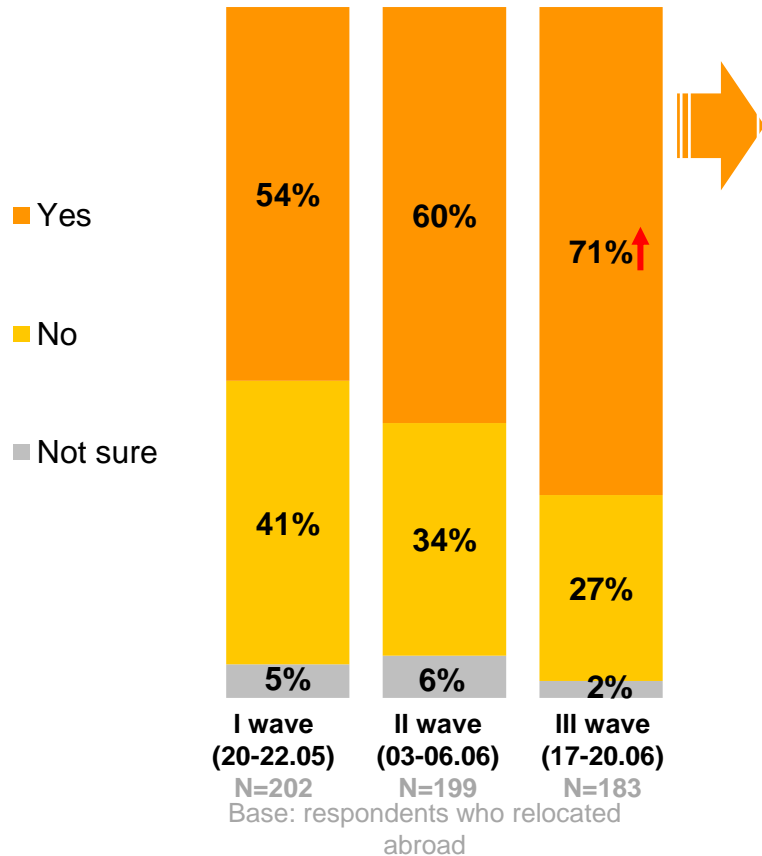
Have you or your family received humanitarian aid from the Ukrainian government?
 What kind of humanitarian aid did you or your family receive from the Ukrainian government?
 How would you assess the humanitarian aid provided to you or your family by the Ukrainian government?

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

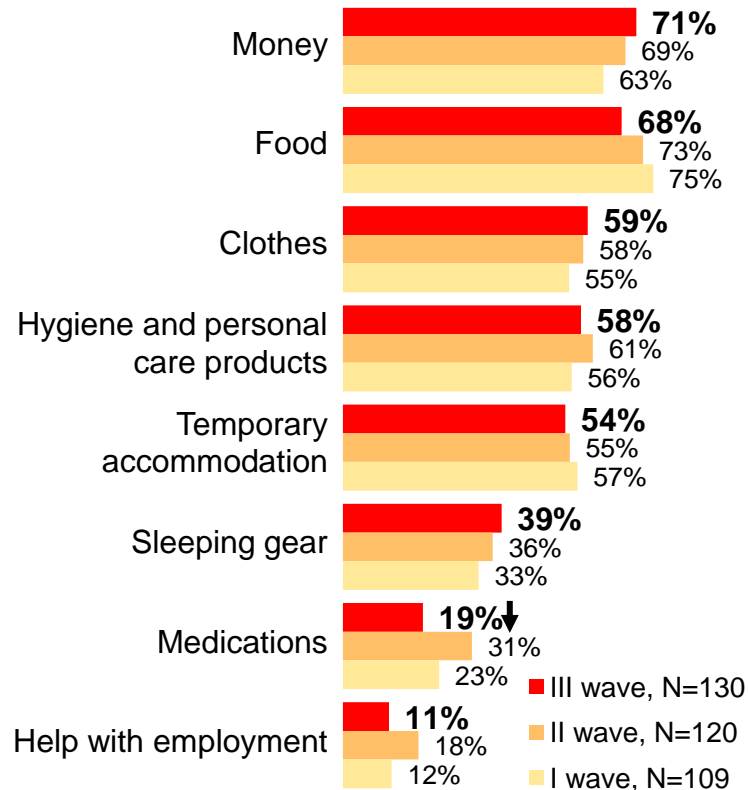
HUMANITARIAN AID FROM THE FOREIGN GOVERNMENT

The third wave saw a significant increase in the share of those who received humanitarian aid from the country where they moved because of the war (from 60% to 71%); at the same time, the assessment of the aid provided by a foreign state as sufficient (79%) remained unchanged. Money, food, clothing, hygiene products and temporary housing remain the most commonly received items (more than half of the respondents declared receiving them). At the same time, the share of those who received medication as a type of aid decreased (from 31% to 19%).

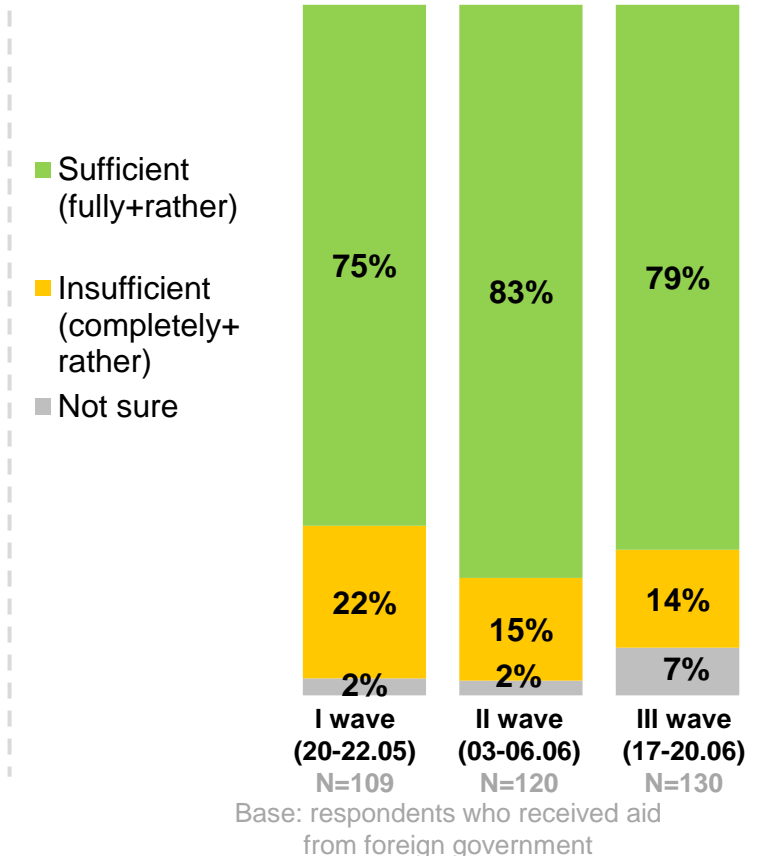
Reception of humanitarian aid from the government



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

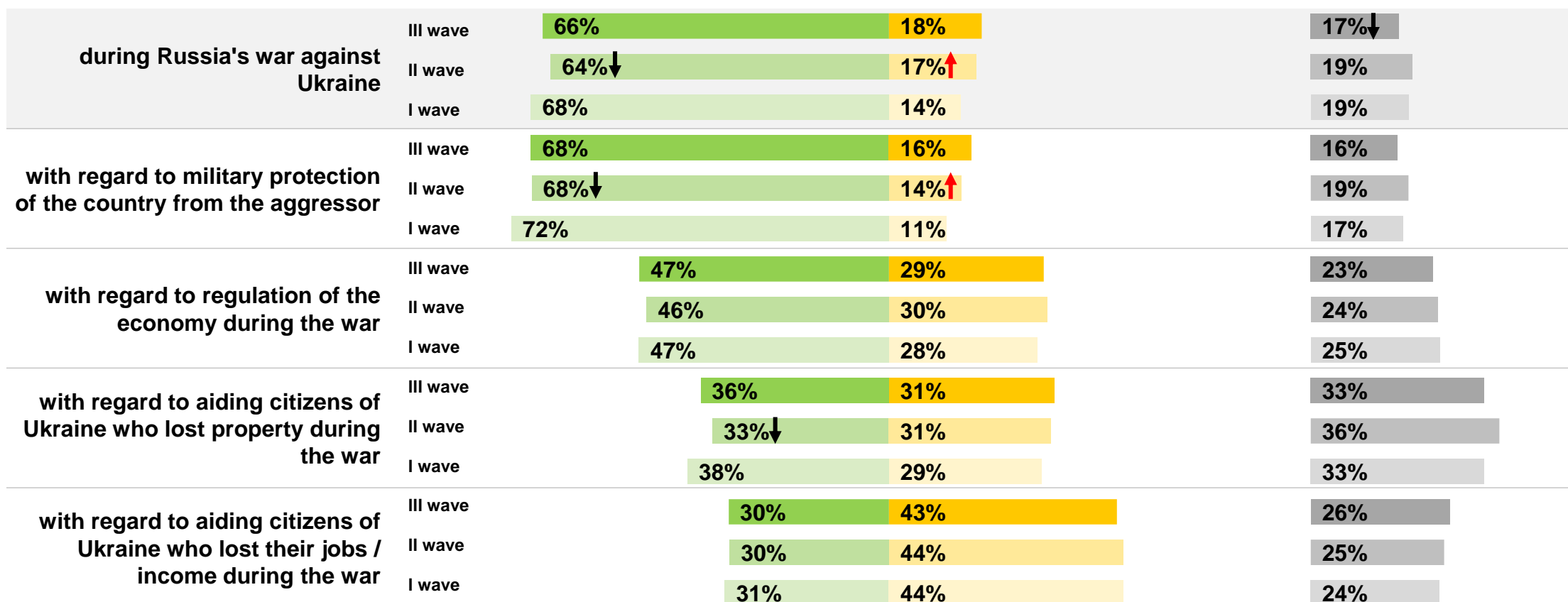
**PERCEPTION OF THE
FULL-SCALE WAR WITH
RUSSIA**



EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES...

In the third wave, there were almost no significant changes in the assessment of the effectiveness of the Ukrainian authorities' actions (the only exception is a decrease in the share of those who found the first question of the set difficult to answer). In the East, the share of those who consider the actions of the government since the beginning of the war to be effective has grown; however, the figure is still significantly lower than the corresponding percentage of the sample as a whole. The assessment of actions to regulate the economy and help those who have lost property by IDPs has grown as well.

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



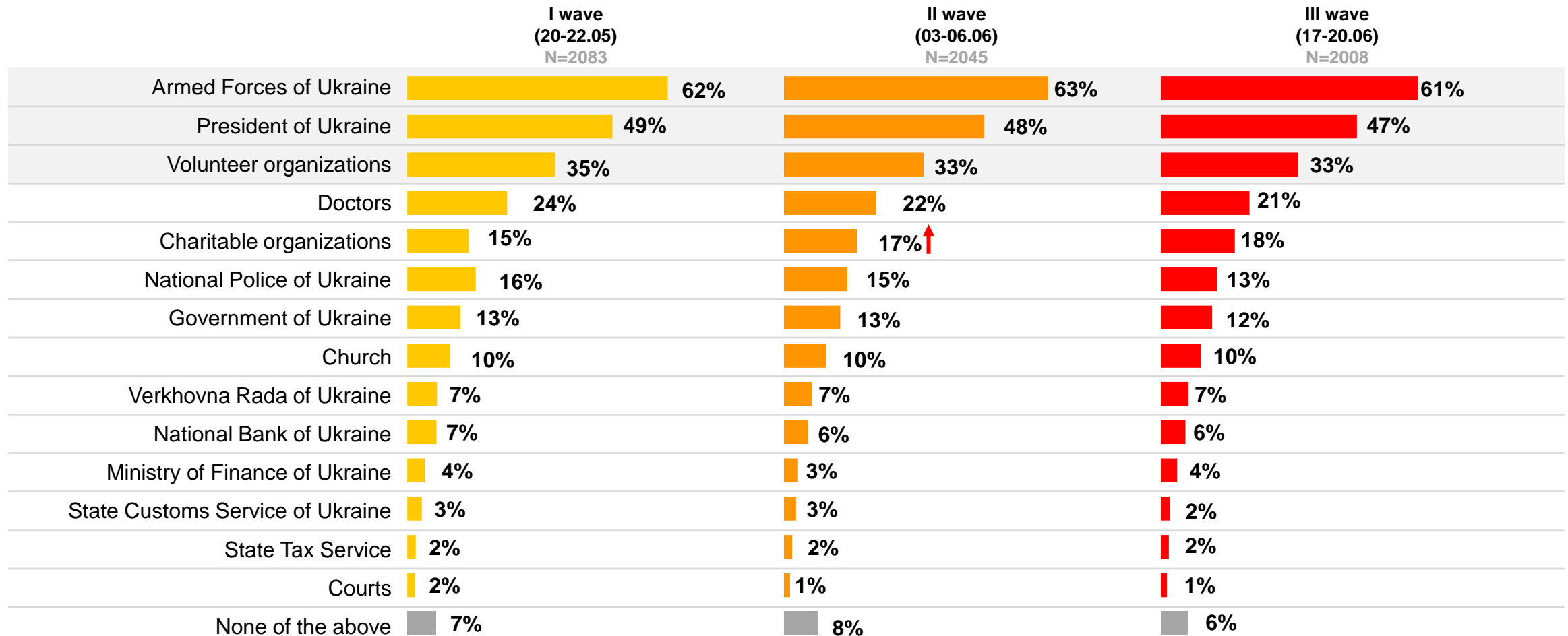
Base: all respondents; I wave - N = 2083, II wave - N = 2045, III wave - N = 2008

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. No significant changes in the level of trust in institutions have been found.



* 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?

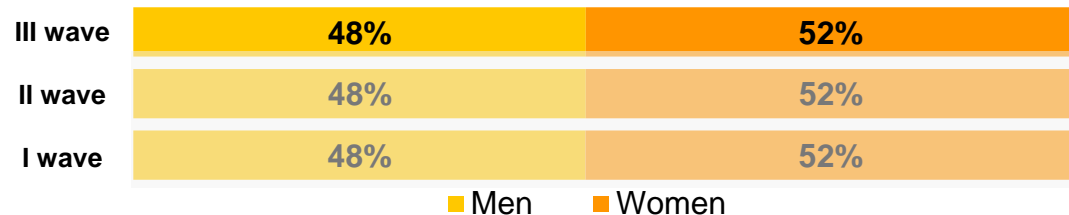
↑↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

SAMPLE STRUCTURE

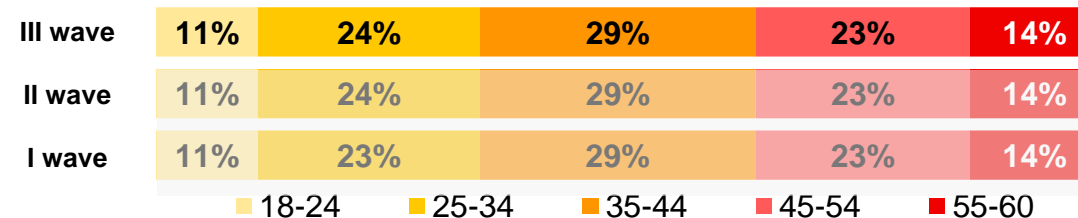


SAMPLE STRUCTURE

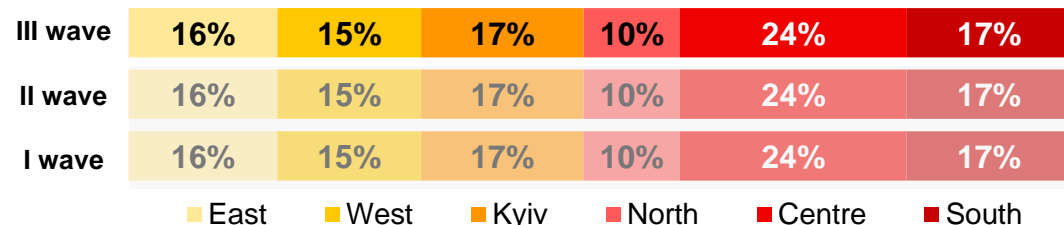
Gender



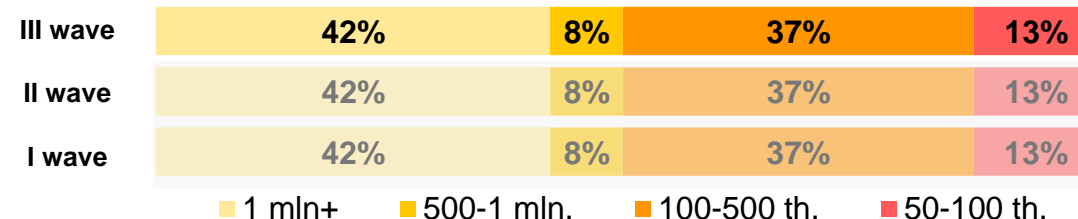
Age



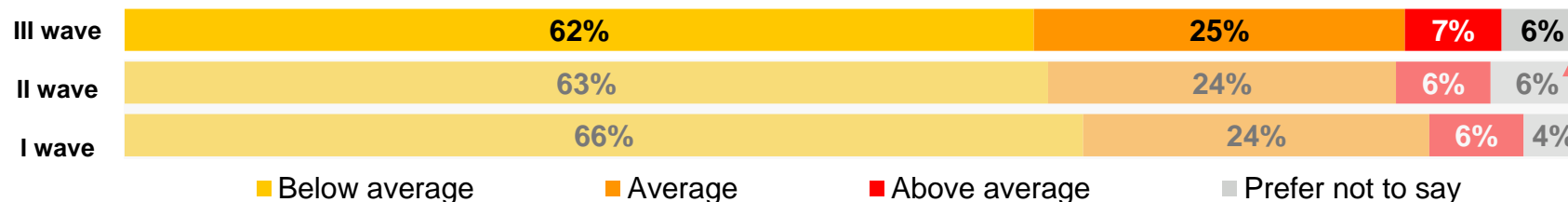
Region (before the war)



Size of settlement (before the war)



Income level





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