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

Analytical report

July 2022

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



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,
4th wave – 2012.



Field period of the survey:

1st wave – May 20 - May 22
2nd wave – June 3 - June 6
3rd wave – June 17- June 20,
4th wave – July 1 - July 4.

CONCLUSIONS (1/2)

Ukrainians'* actions during the war

- In the fourth wave, **the share of Ukrainians* who left their place of residence and have already returned increased significantly** (from 15% to 17%); more often it is Kyiv residents - 29%, and residents of the North - 34%. At the same time, the share of people who remain at their places of permanent residence decreased significantly (from 64% to 60%; more often these are residents of the South - 69%, West - 72%, and Center - 76%); the share of people who continue to be far from home remains unchanged (23%, mostly residents of the East).
- In the fourth wave, the **share of people remaining in the country who hesitated to answer** the question about their **willingness to change their place of residence** in case the situation aggravates **decreased** (from 12% to 10%); at the same time, there were no changes in the intentions of the rest: 54% want to stay at their current place of residence, 23% want to move within Ukraine, and 12% want to move abroad. The distribution of answers regarding the possibility of moving in case of aggravation of the situation has also not changed: 45% of respondents state not having an opportunity to change their place of residence, while 49% do have such an opportunity (30% - within the country, and 19% - abroad).
- 66% of **external migrants who have not yet returned home** declare their desire to return home at the first opportunity, while 18% want to stay in another country. Safety in their locality as well as its absence are, respectively, the biggest driver of (56%) and barrier to (78%) the return to Ukraine; 51% of respondents also mentioned the desire to return home to their usual life as one of the driving factors of their return. As for the possibility of staying abroad, there were no changes in the distribution of answers in the fourth wave compared to the previous one: 66% of respondents have such a possibility, while 17% do not have it and will return home at the first opportunity.
- Among **internal migrants**, the share of those who want to stay at the new place, even if it becomes safe at home, has increased significantly compared to the third wave (from 8% to 14%). The share of those who want to return home remained unchanged at 75%. Respondents began to hesitate less often when answering the question about the possibility of staying in a new place (from 20% to 11%). The rest of the indicators remained at the level of the third wave: 39% have such an opportunity, while 50% 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 37% of respondents saying so. At the same time, in the fourth wave, the **need for a safe place to live** among the respondents **increased significantly** (from 22% to 29%); it began to be expressed more often by respondents, regardless of their migratory status.
- Ukrainians'* **health is still considered** by them **to be rather poor**: only 42% of the audience say that they have no physical health issues, and only 39% – that they have no mental health issues.
- Compared to the previous wave, Ukrainians* began to report receiving **humanitarian aid from the Ukrainian state** more often (from 28% to 31%). The most common forms of assistance received by people are money (72%) and food (45%). The assessment of sufficiency of the aid remains without significant changes: 46% consider it sufficient and 48% – insufficient.
- The share of **external migrants who received humanitarian aid from the countries where they went** because of the war remained without significant changes – 67%. The form of assistance received also remained unchanged: mostly, people received money, food, hygiene products, clothes, and temporary housing. The assessment of the assistance as sufficient remained at the level of the third wave and is at 83%.

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 invasion in general, as well as in the field of military protection, economic regulation, and assistance to citizens who have lost their jobs and property remains at the level of the third wave. The latter two areas remain the most "problematic" areas 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 46% of Ukrainians * trust in them, respectively. Trust in other institutions also remains unchanged, except for a decrease in trust in doctors (from 21% to 19%). Ukrainians* continue to 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 the Verkhovna Rada of Ukraine, judicial, and customs systems.

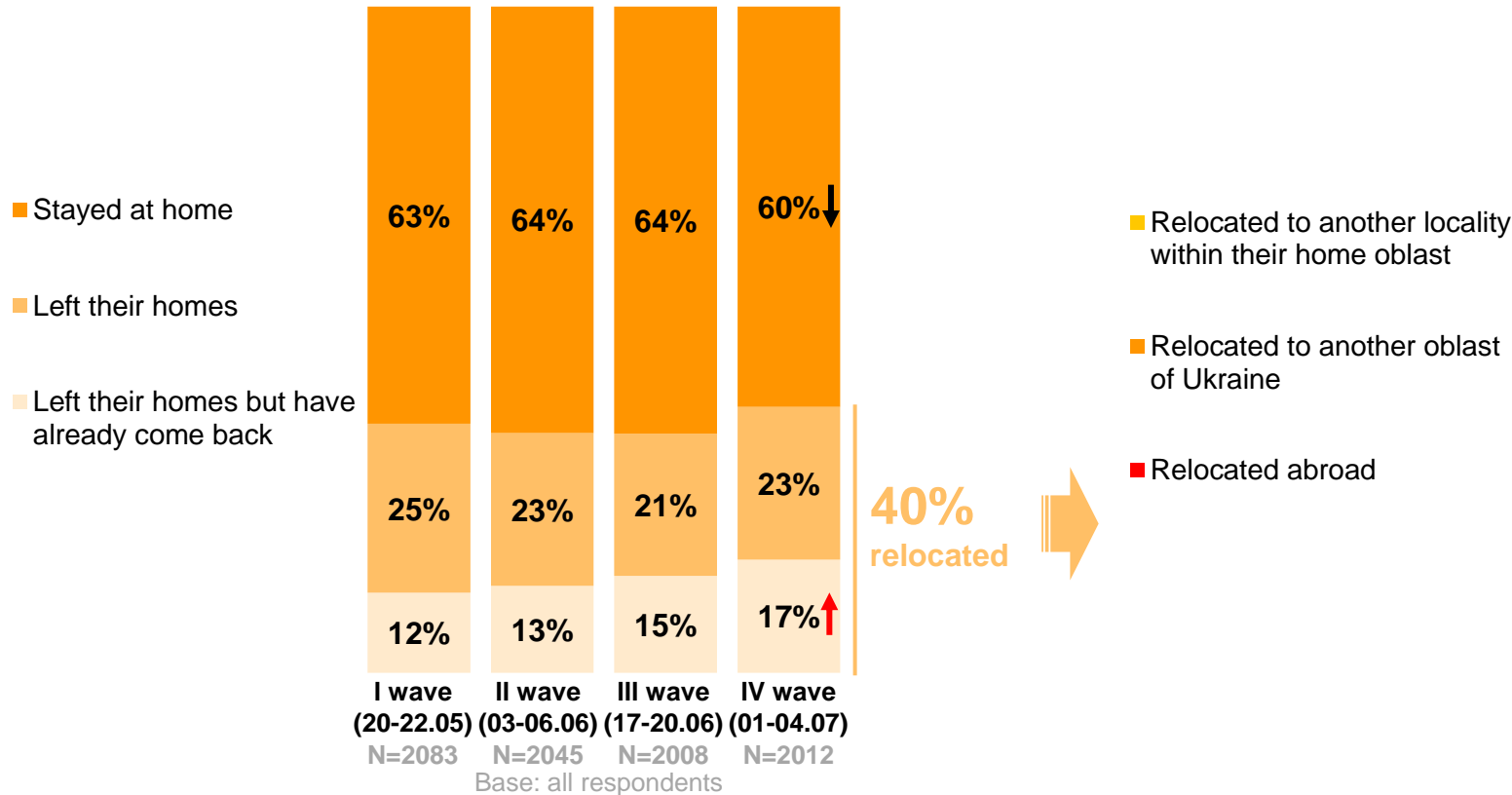
UKRAINIANS'* ACTIONS DURING THE FULL-SCALE WAR

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

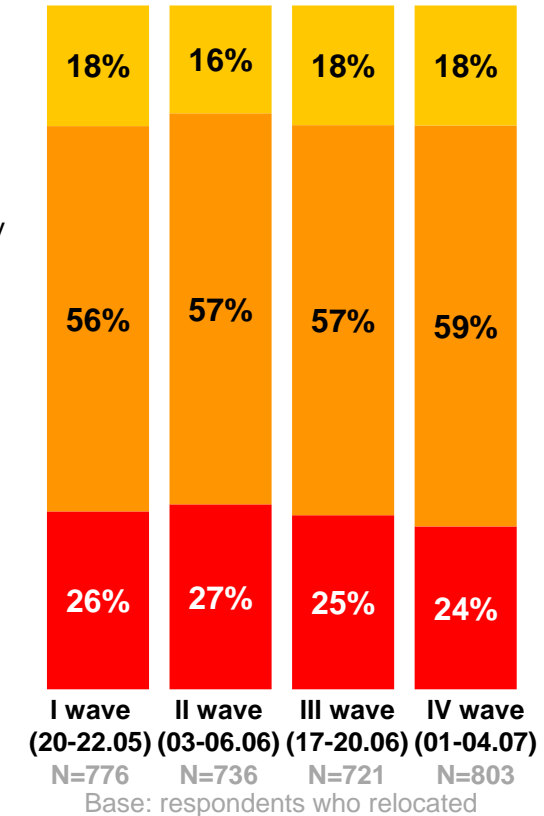
RELOCATION OF UKRAINIANS* DUE TO THE WAR

In the fourth wave, the share of Ukrainians* who changed their place of residence since the beginning of the full-scale war and have already returned increased significantly (from 15% to 17%). At the same time, the share of those who stayed at home decreased (from 64% to 60% - mainly due to the increase in the share of those who have already returned). The directions of migration remained unchanged: most often, respondents relocated to other oblasts within Ukraine (59%) or abroad (24%); less than a quarter (18%) of the respondents migrated within their region.

Relocation of Ukrainians* due to the war



Relocation specifics



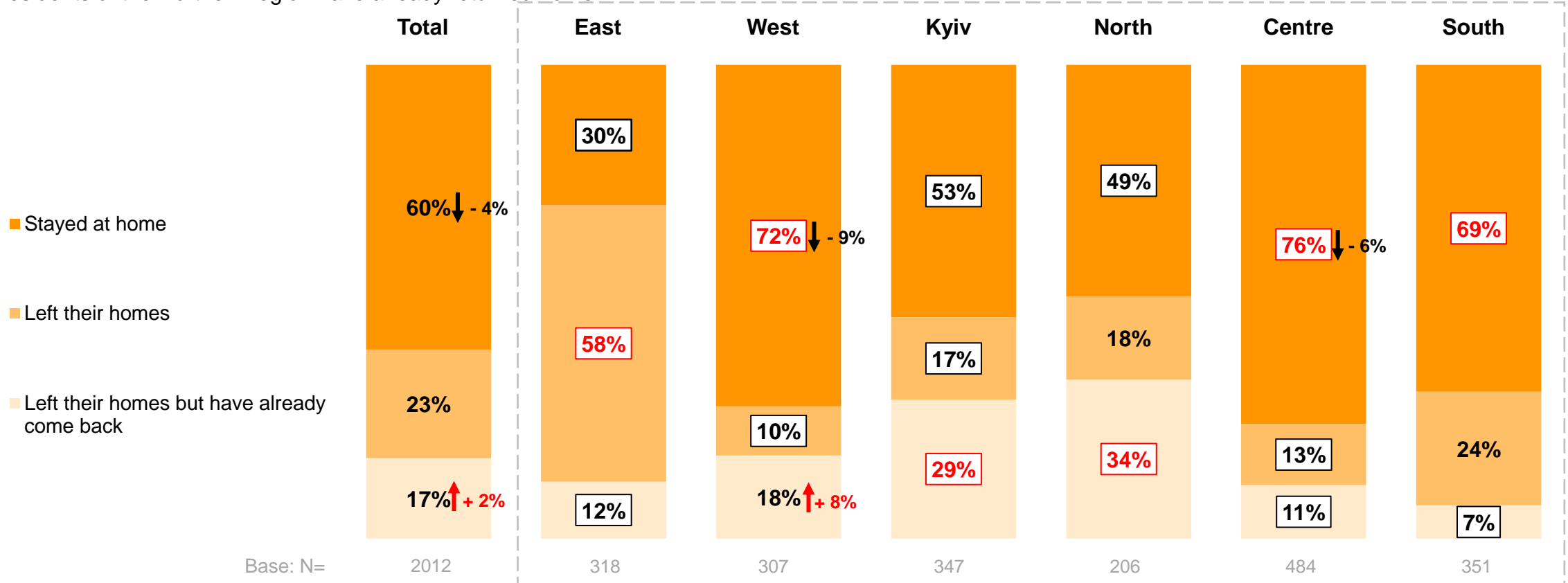
*Ukrainians - residents of cities with population of 50 thousand and more, aged 18-60 years, who use smartphones
 Which of the following phrases best reflects your actions in the situation of Russia's war against Ukraine:
 In which direction were you forced to move:

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

RELOCATION DUE TO THE WAR

by regions

Compared to the previous wave, the share of people who stayed at their places of residence among the residents of the Central and Western regions decreased significantly (from 82% to 76% in the Centre, from 81% to 72% in the West); also, the share of those who returned home among the residents of the Western region increased significantly (from 10% to 18%). In general, residents of the Eastern region left their homes more often, while residents of the Western, Central and Southern regions, on the contrary, remained at their permanent places of residence. Relatively larger shares of Kyiv residents and residents of the Northern region have already returned home.



*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 phrases best reflects your actions in the situation of Russia's war against Ukraine:



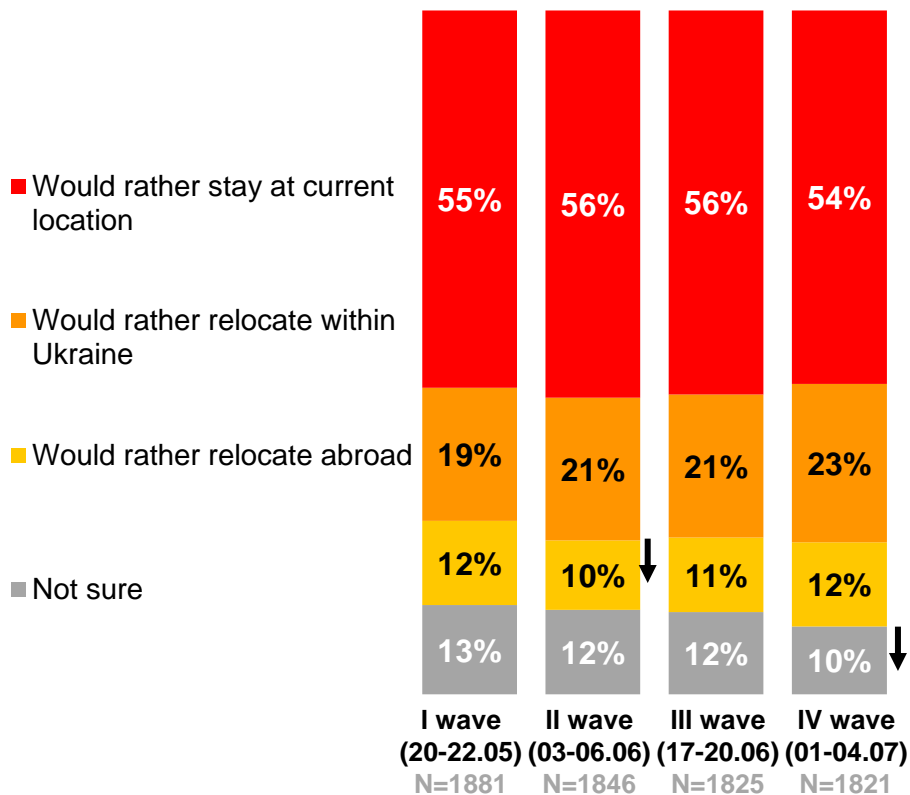
Numbers that are statistically significantly **higher / lower** for a group, compared to the sample as a whole

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

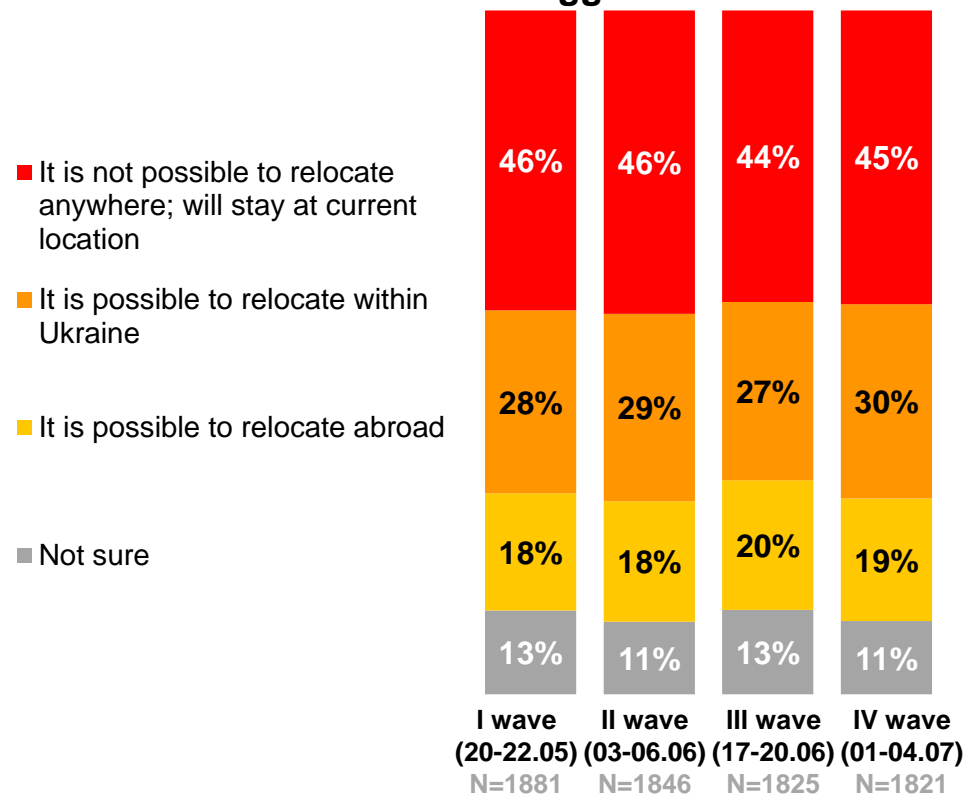
RELOCATION IN CASE OF AGGRAVATION. WISHES & OPPORTUNITIES

In the fourth wave, the share of people who were undecided about the direction of migration in case the situation aggravates decreased (from 12% to 10%). There are no significant changes in the shares of those who want to stay at their places of residence (54%), those who would prefer to relocate within Ukraine (23%), and those who want to relocate abroad (12%) in case of aggravation of the situation. Also, in the fourth wave, the distribution of answers to the question about the possibility of relocation in case of aggravation of the situation remains unchanged: respondents equally declare both the availability of relocation opportunities and their absence - 49% vs 45%. Among those who have the opportunity to move, 30% can do so within Ukraine, and 19% can move 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 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?

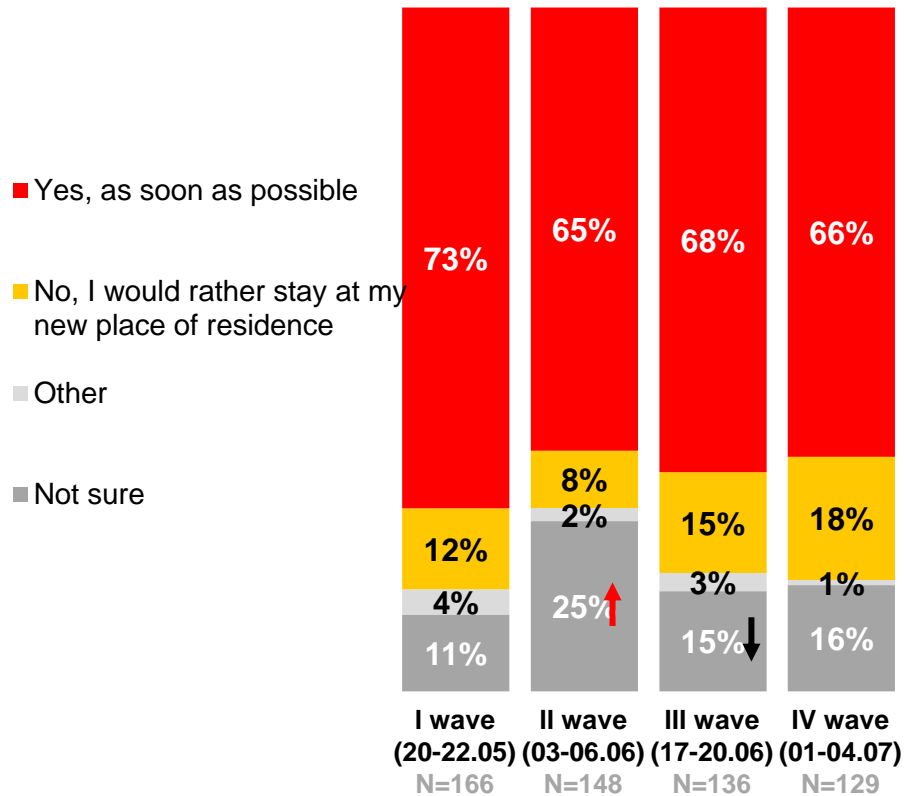
In case of further exacerbation, is it possible for you to relocate further away, go abroad or stay where you are now?

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

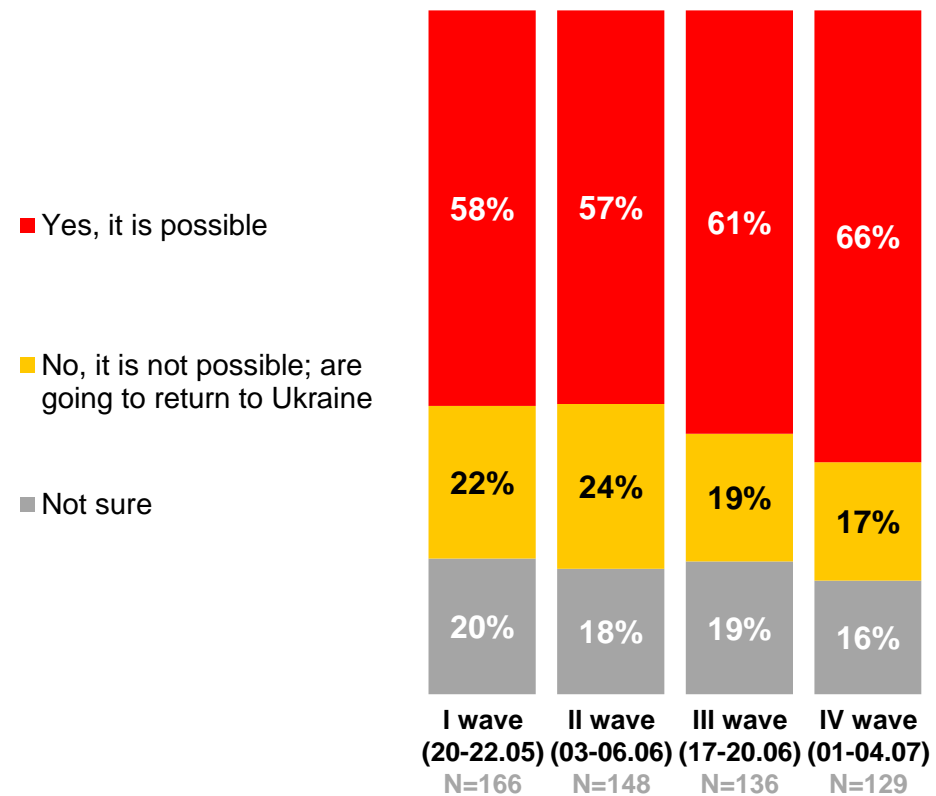
WISHES REGARDING COMING BACK FROM ABROAD. POSSIBILITY OF STAYING THERE

In the fourth wave, there are no significant changes in the distribution of answers to the question about the desire to return from abroad, compared to the previous wave. The vast majority (66%) of emigrants want to return at the first opportunity, while 18% want to stay at their new places. The distribution of answers to the question about the possibility of staying abroad also remains unchanged: more than half (66%) of respondents have such an opportunity, while 17% indicate its absence.

Wishes regarding coming back from abroad



Possibility of staying abroad



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?

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

RETURNING TO UKRAINE. MOTIVES AND BARRIERS

For persons who relocated abroad and have not yet returned home, main motives for returning are the safety factor in the home locality (56%) and the desire to return home to their usual life (51%); 78% of respondents indicate that the main barrier to returning from abroad is the lack of conditions for a safe life.

Motives to return from abroad



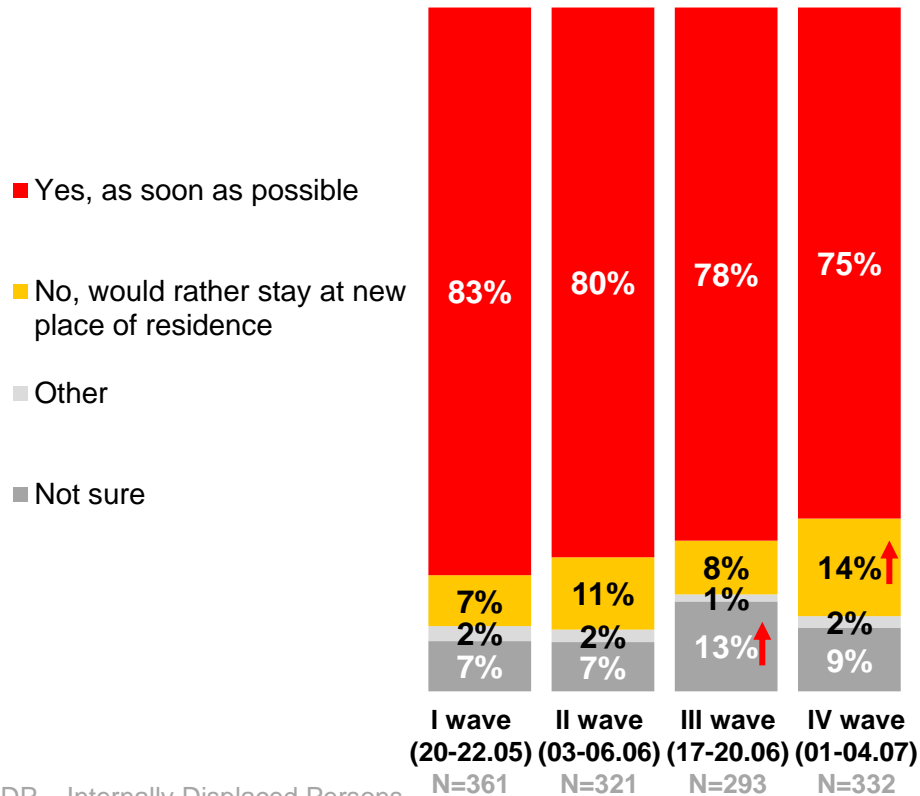
Barriers to returning from abroad



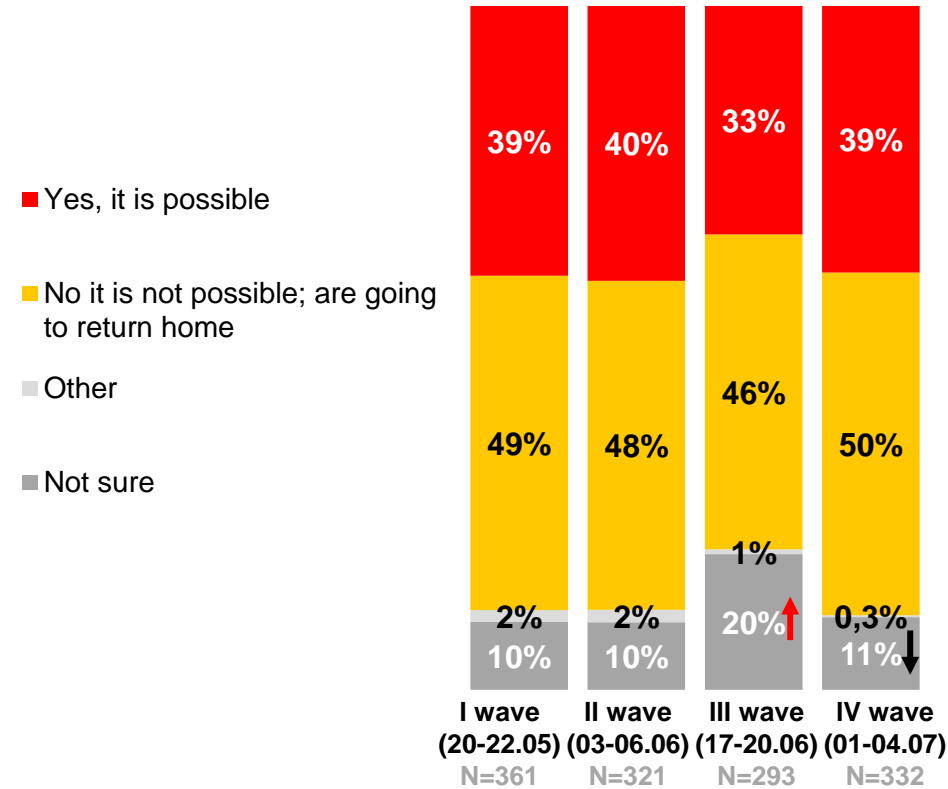
INTERNALLY DISPLACED PERSONS' WISHES REGARDING COMING BACK. POSSIBILITY OF STAYING WHERE THEY ARE

In the fourth wave, the share of internally displaced persons who want to stay at their new places increased significantly (from 8% to 14%); the share of those who want to return home at the first opportunity remained unchanged (75%). Also, there is a significant decrease in the share of those who are undecided about the possibility of staying at their new places (from 20% to 11%), while the distribution of possibilities remained unchanged: 39% have them, and 50% 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?

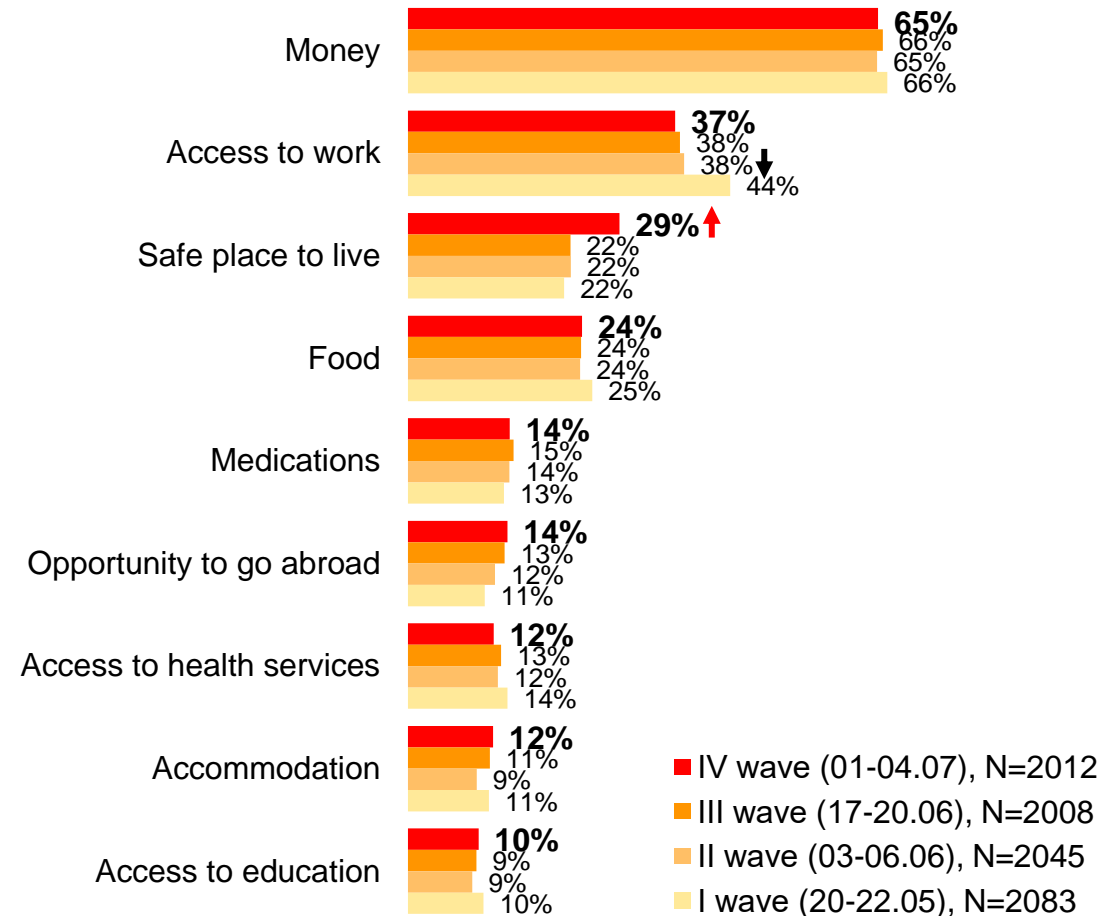


 Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

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

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

THINGS THAT ARE NEEDED MOST

In the fourth wave, money and access to work remain the things that respondents need the most – 65% and 37%, respectively. Compared to the previous wave, the respondents declared an increase in the need for a safe place to live (from 22% to 29%).

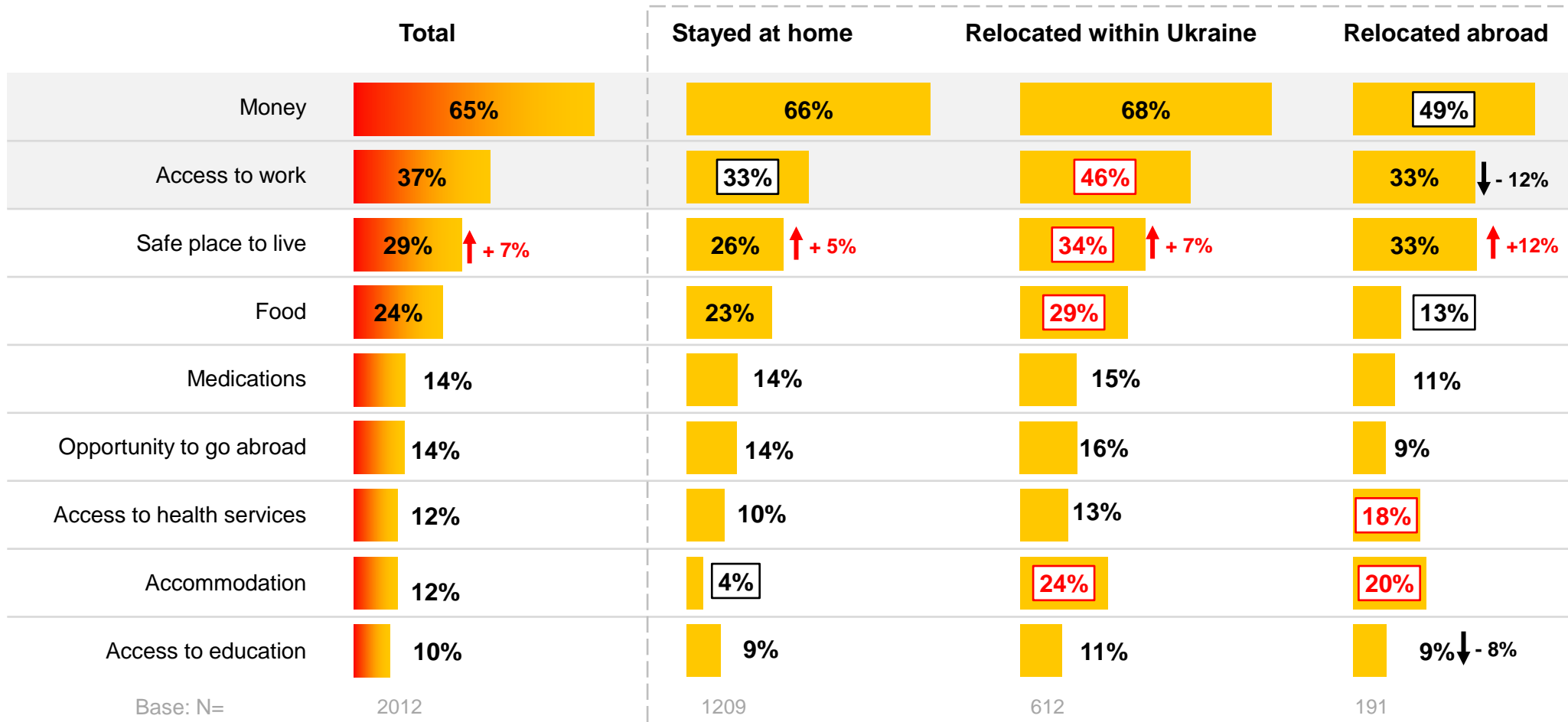


↓↑ Numbers that are statistically significantly **higher / lower**, compared to the previous wave of the study


FAMILIES' NEEDS


by migration status

Compared to the previous wave the need for a safe place of residence has increased, both among migrants and those who stayed at home. At the same time, there has been a significant decrease in the share of external migrants who need access to work and education.



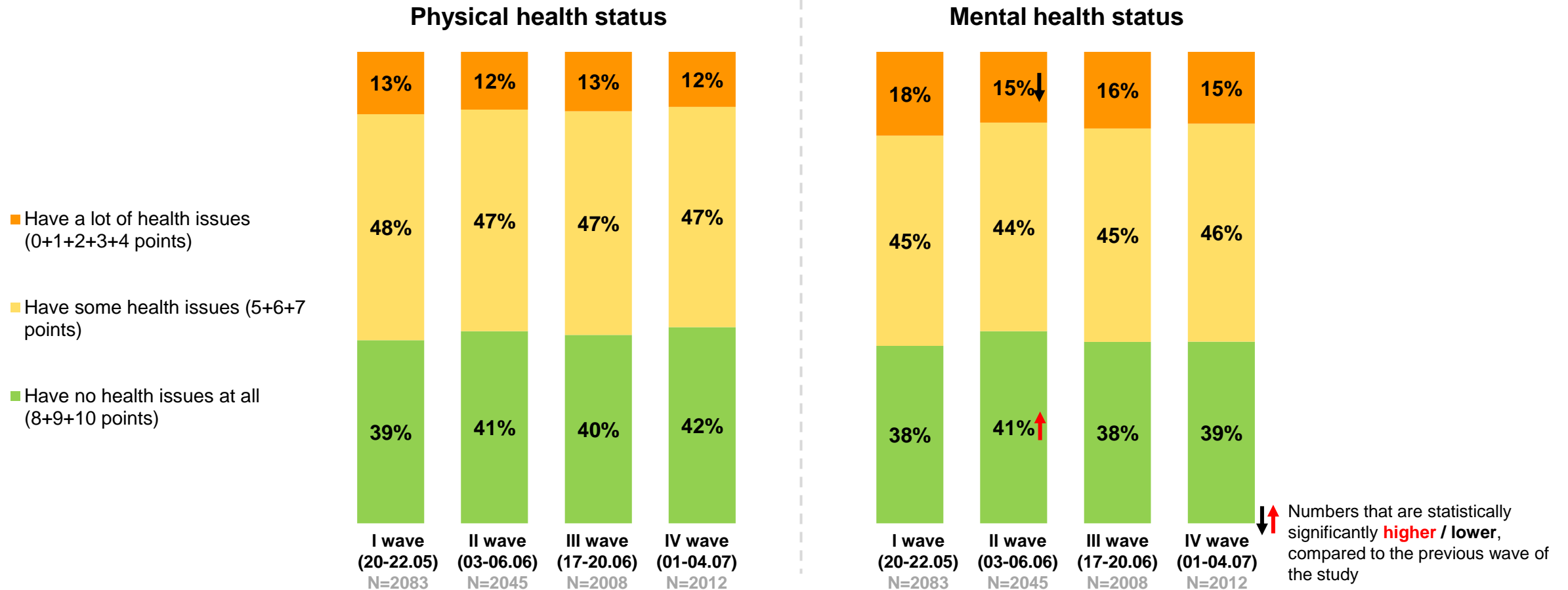
Base: all respondents
As of today, what do you or your family need most?

 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

Compared to the third wave, assessments of physical and mental health remained unchanged: about half (47% and 46%) of the respondents have some issues, 42% and 39% claim to not have any, and 12% & 15% have a lot of issues (according to their own declaration).



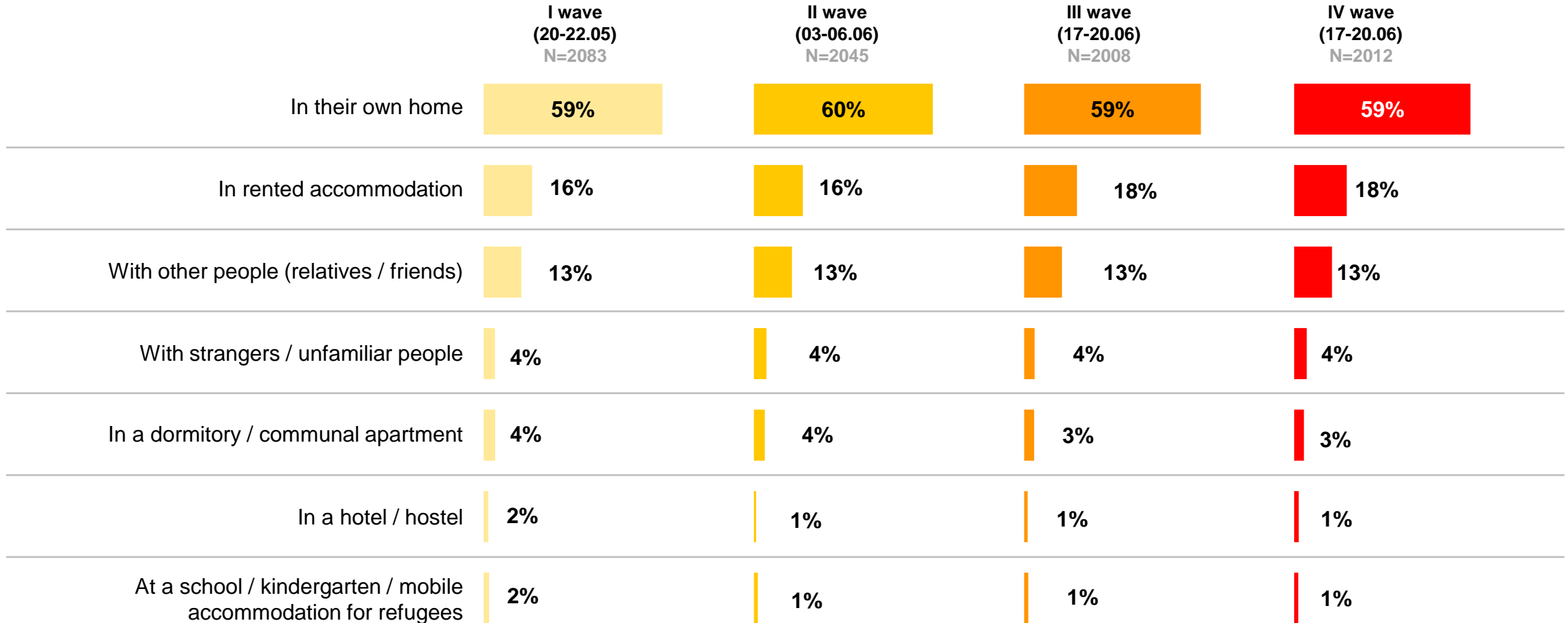
Base: all respondents

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

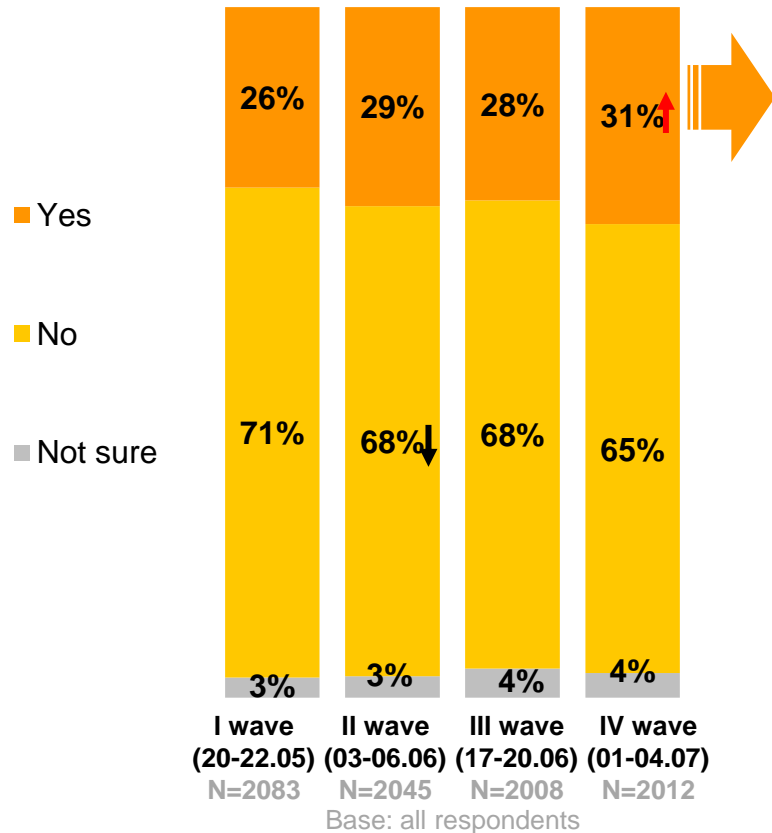
The vast majority of respondents (59%) continue to live in their own homes. Other common places of residence include rented housing (18%) and homes of friends and relatives (13%). No significant differences compared to the previous wave have been found.



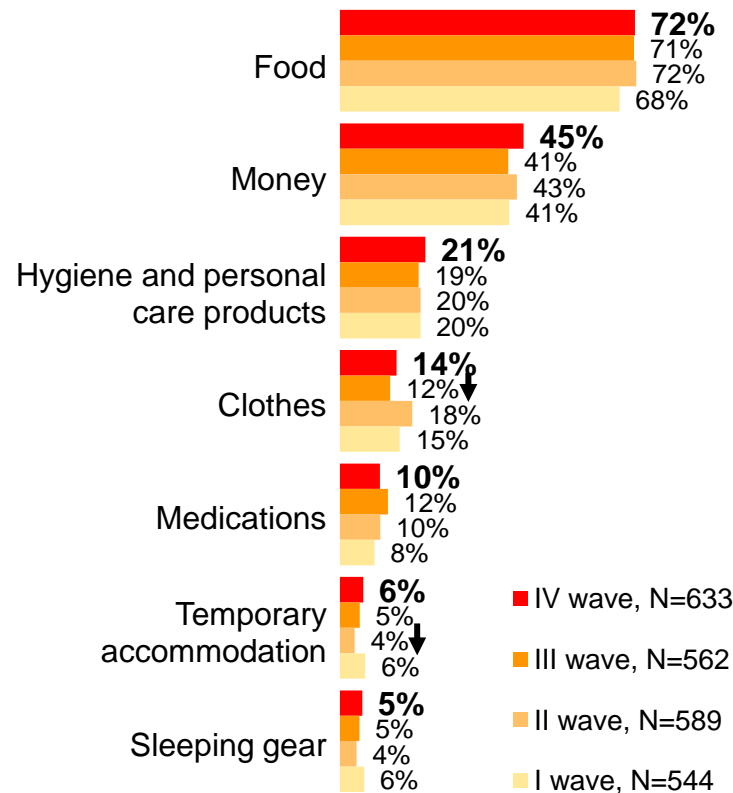
HUMANITARIAN AID FROM THE UKRAINIAN GOVERNMENT

Compared to the previous wave, the share of those who received humanitarian aid from the Ukrainian state has increased significantly and is currently at 28%. The share of respondents who consider this aid to be sufficient has not changed significantly and is currently at 46%. The most common forms of this assistance remain the same, namely money and food.

Reception of humanitarian aid from the government

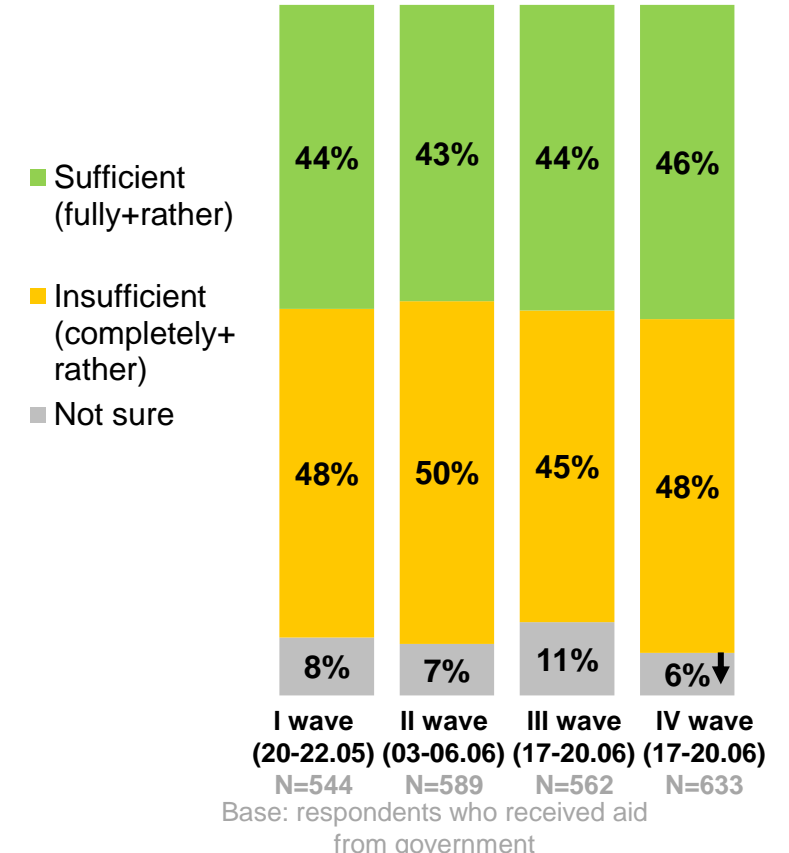


Type of humanitarian aid



Base: respondents who received aid from government

Sufficiency of the humanitarian aid

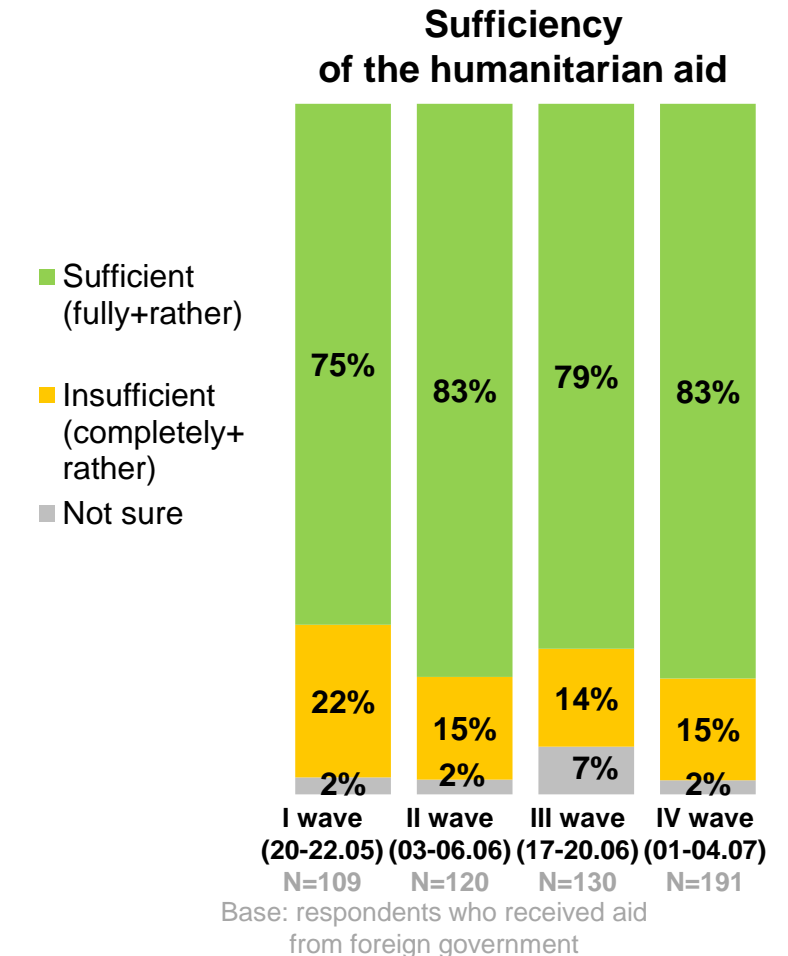
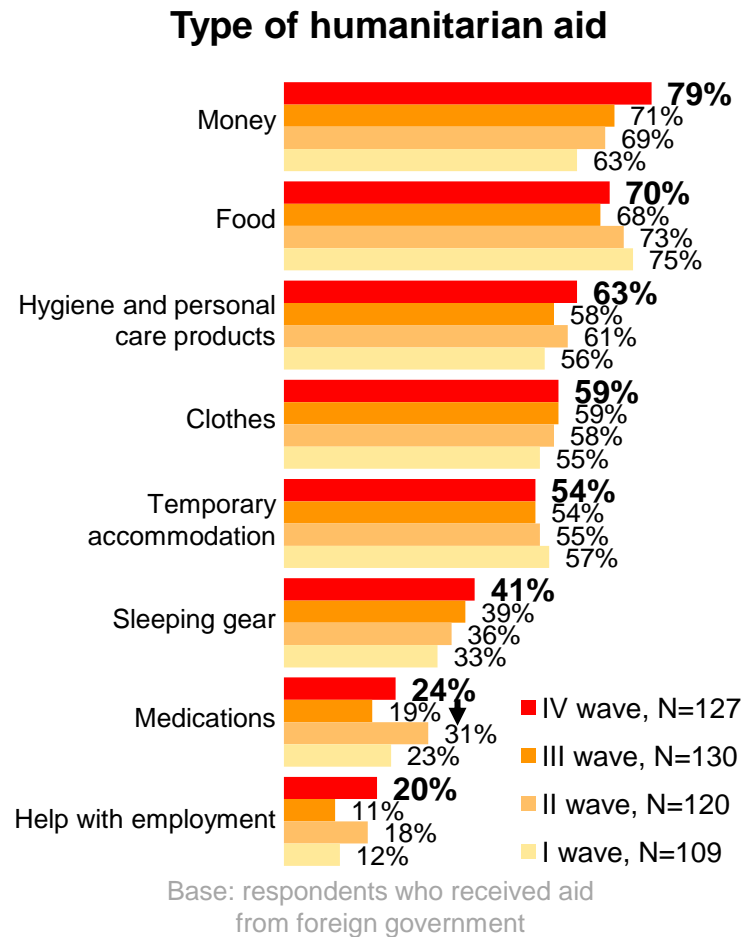
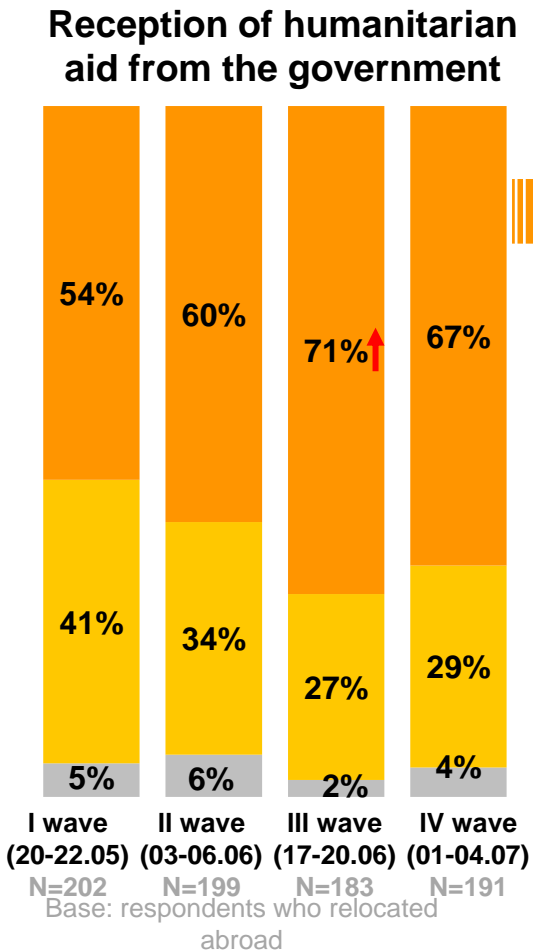


Have you or your family received humanitarian aid from the Ukrainian government?
 What kind of humanitarian aid did you or your family receive from the Ukrainian government?
 How would you assess the humanitarian aid provided to you or your family by the Ukrainian government?

↑↓ Numbers that are statistically significantly higher / lower, compared to the previous wave of the study 17

HUMANITARIAN AID FROM THE FOREIGN GOVERNMENT

There have been no significant changes in the share of emigrants who received humanitarian aid from the government of the country where they moved – it is currently at 67%. Respondents mainly received money (79%), food (70%), hygiene products (63%), and clothes (59%). 83% consider the aid received to have been sufficient.



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?

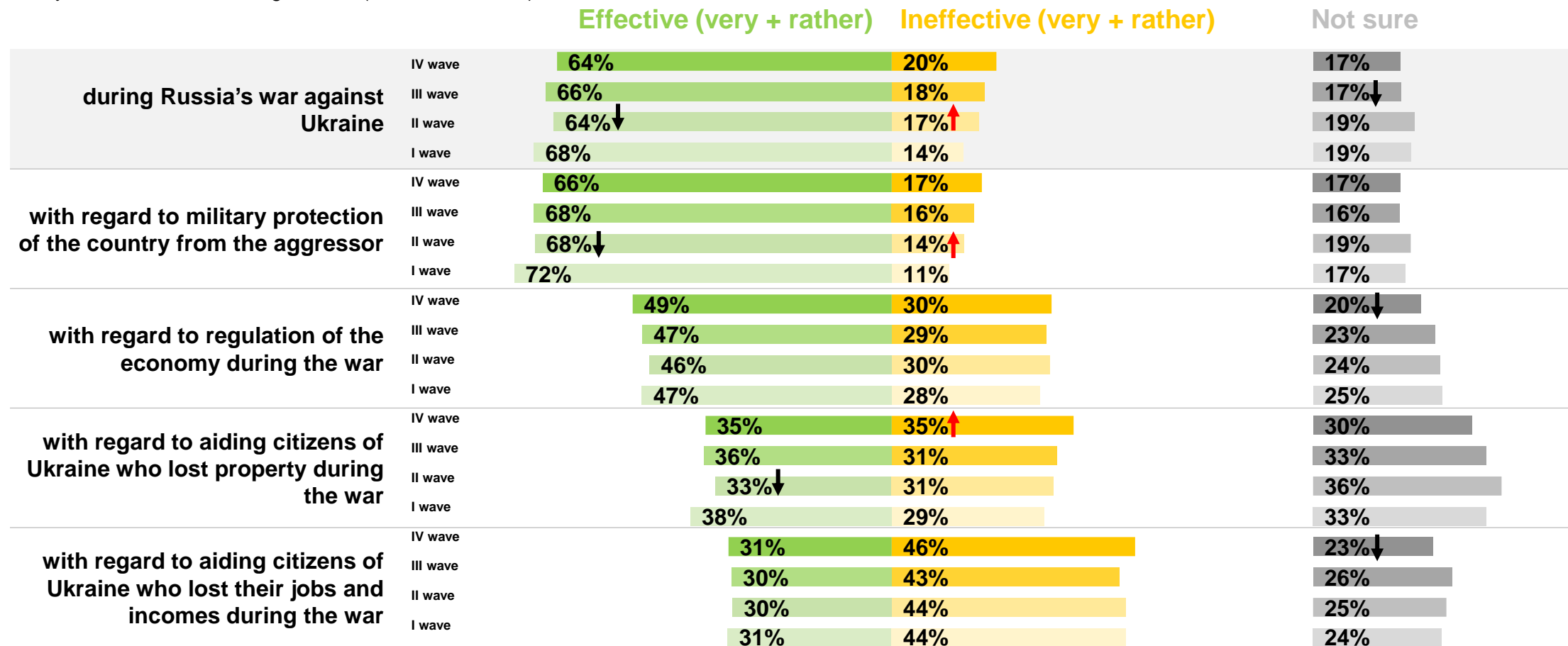
↑↓ Numbers that are statistically significantly higher / lower, compared to the previous wave of the study

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



EFFECTIVENESS OF THE UKRAINIAN AUTHORITIES...

In the fourth wave, the most significant change in the evaluation of the effectiveness of the Ukrainian authorities' actions was the increase in the share of those who consider the actions of the authorities to help those who lost property to be ineffective – it is now equal to the share of those who consider these actions effective (35%). Also, there is a significant decrease in the shares of those who hesitated while evaluating the effectiveness of the authorities' actions with regard to economic regulation (from 23% to 20%) and aiding citizens who lost their jobs and incomes during the war (from 26% to 23%).



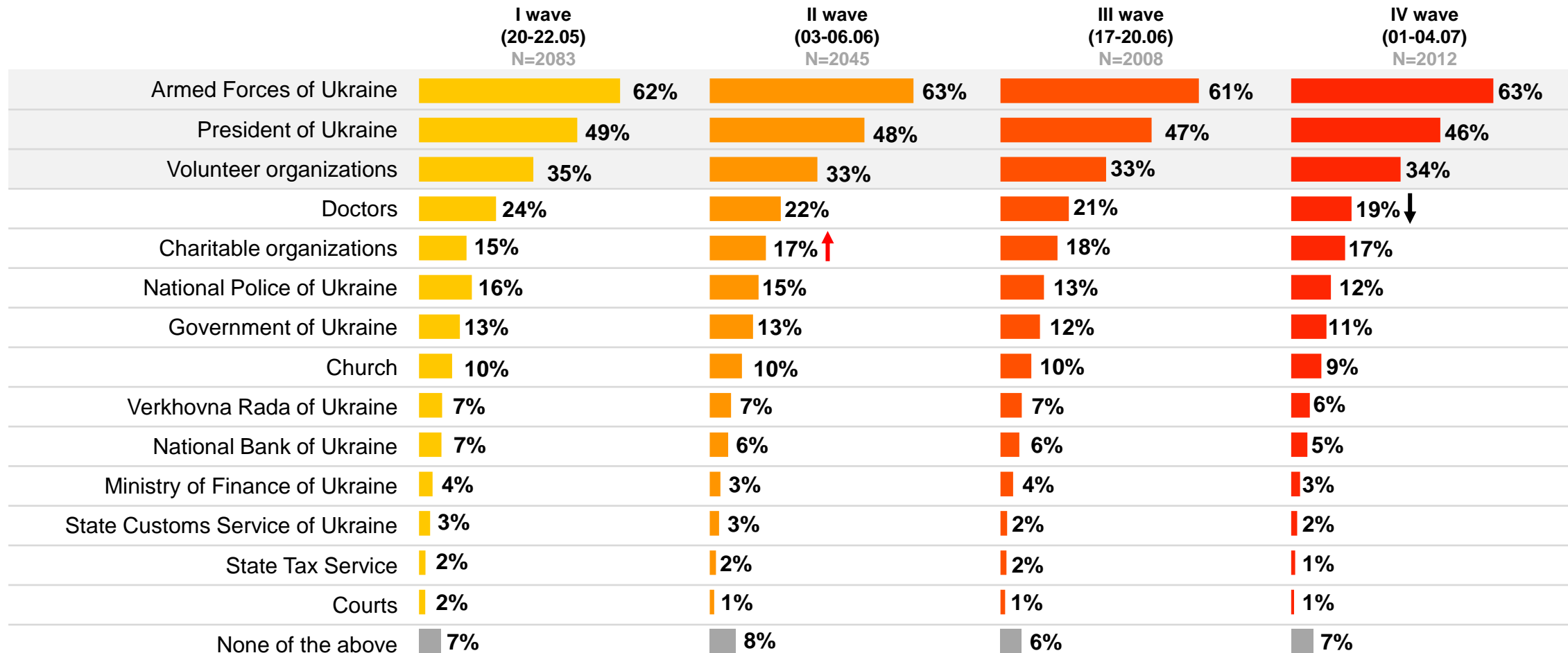
Base: all respondents; I wave - N = 2083, II wave - N = 2045, III wave - N = 2008, IV wave - N = 2012

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 and incomes during the war?

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

TRUST IN INSTITUTIONS

Most of all Ukrainians trust Armed Forces of Ukraine (63%), the President (46%), and volunteer organizations (34%). Compared to the third wave, the level of trust in doctors has significantly decreased.



*Ukrainians - residents of cities with the population 50,000+ aged 18-60 who use smartphones.

Base: all respondents

Which of the following institutions do you trust?

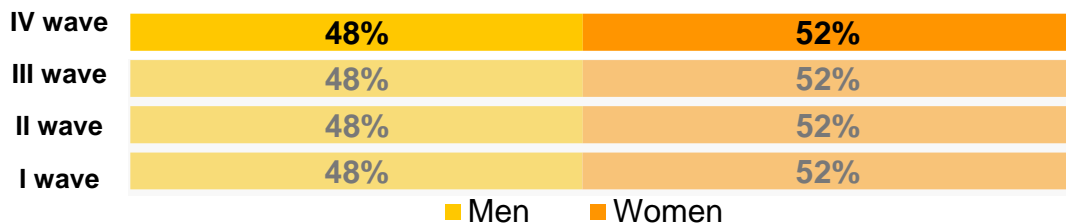
↑ ↓ Numbers that are statistically significantly **higher** / **lower**, compared to the previous wave of the study

SAMPLE STRUCTURE

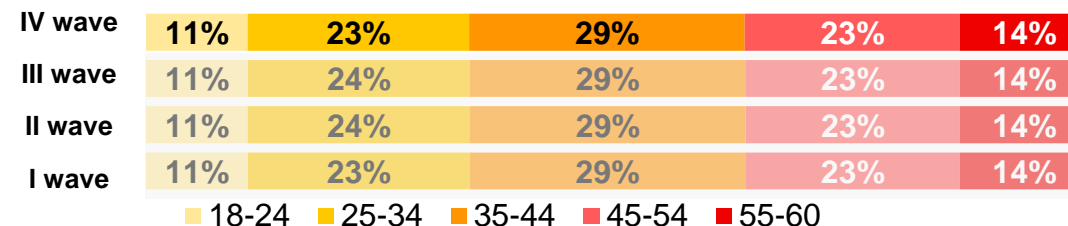


SAMPLE STRUCTURE

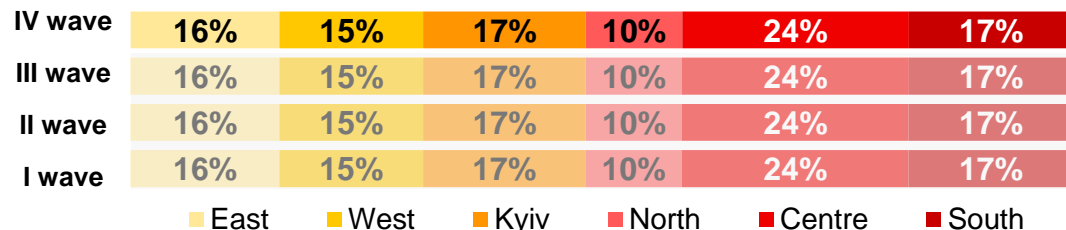
Gender



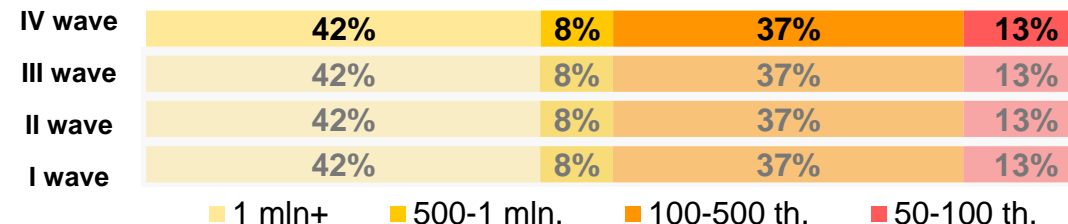
Age



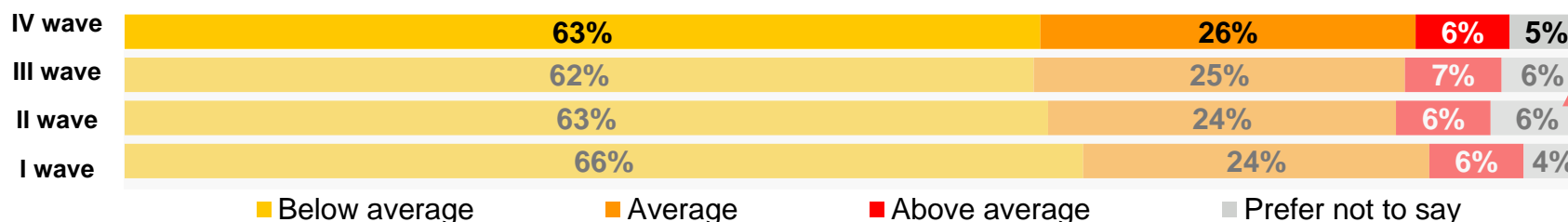
Region (before the war)



Size of settlement (before the war)



Income level





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