



COMPARATIVE RESEARCH:

A PAN-EUROPEAN STUDY OF UKRAINIANS IN EUROPE



RATING LAB
August 2023





METHODOLOGY

- • • ✓ **Comparative study**
- • • ✓ **Audience:** Ukrainians aged 18 years and older who found temporary asylum in European countries after 24.02.2022. Results are weighted using up-to-date UNHC (United Nations High Commissioner for Refugees, indicator of Ukrainians who applied for asylum, TA or similar national protection programmes) data.
- • • ✓ **Country geography:** 31 European countries.
- • • ✓ **Sample population:** 2116 respondents.
- • • ✓ The research was conducted by Rating Lab. The survey for the research was conducted by the Rating Sociological Group on the Rating Online Platform.
- • • ✓ **Survey method:** CAWI (Computer Assisted Web Interviewing). The survey is anonymous, respondents were invited via messengers and social networks.
- • • ✓ **Study** representativeness error at a confidence level of 0.95: not more than 3.2%
- • • ✓ **Timeline:** July 4-11, 2023.
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The report is prepared by:



Marianna Tkalych,
Doctor of psychological sciences, professor, founder and director of the research laboratory Rating Lab.



Tetiana Skrypchenko,
A senior analyst at the Sociological Rating Group. Deputy director of Rating Online



Olga Dukhnich,
Candidate of psychological sciences (PhD), Rating Lab expert



Classification of regions of Europe used in the analysis

ABOUT THE LABORATORY



Marianna Tkalych,

Doctor of psychological sciences,
professor, founder and director of
the research laboratory Rating Lab.

tkalych@ratinggroup.ua

The Rating Lab research laboratory was founded in March 2021 and is part of a larger team, which also includes the Rating Sociological Group and the Rating Online platform. The Lab has taken over the research baton from the Rating Pro Analytical Centre by merging with it.

After the full-scale invasion of 2022, Rating Lab shifted its research focus to the psychological and social aspects of human and national life during the war.

Today the Laboratory develops and implements diagnostic tools to determine the dynamics of psychological and social processes at the level of the individual, community and society as a whole, both in Ukraine and abroad, in particular, only during 2023 a survey of Ukrainians in more than 4 countries of the world was conducted.

Rating Lab has in its asset both well-known measurement tools and unique developments, quantitative and qualitative analytical research.



Ihor Tyshchenko,

Founder of companies:
Sociological Group Rating,
Rating Online, Rating Lab

tyshchenko@ratinggroup.ua

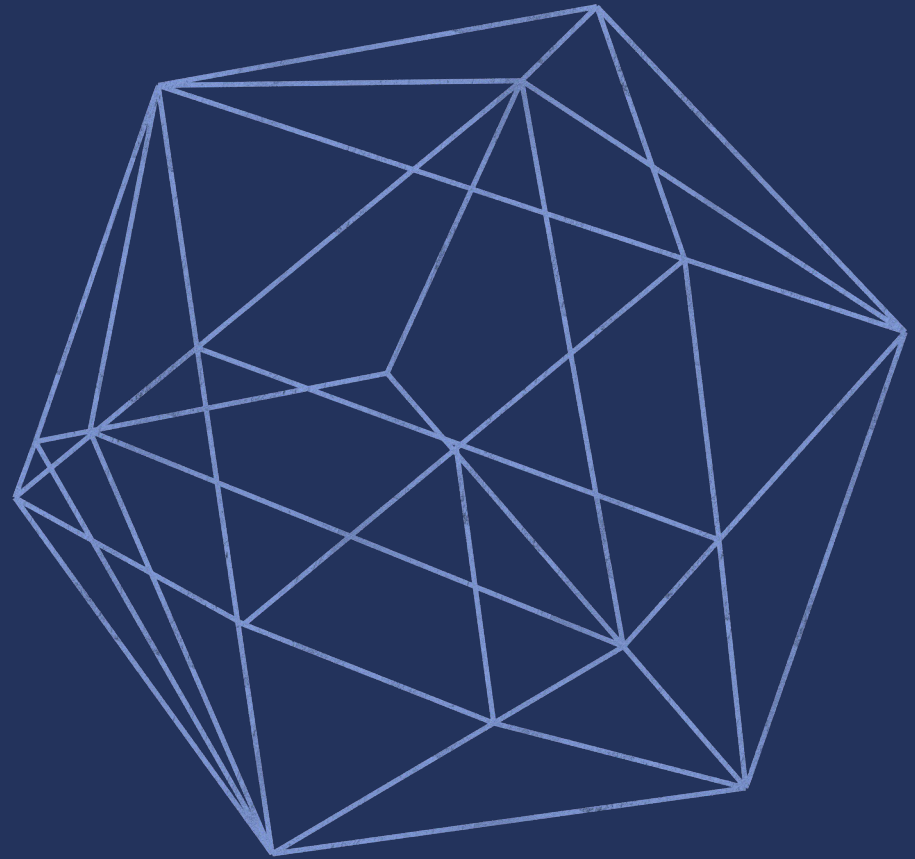


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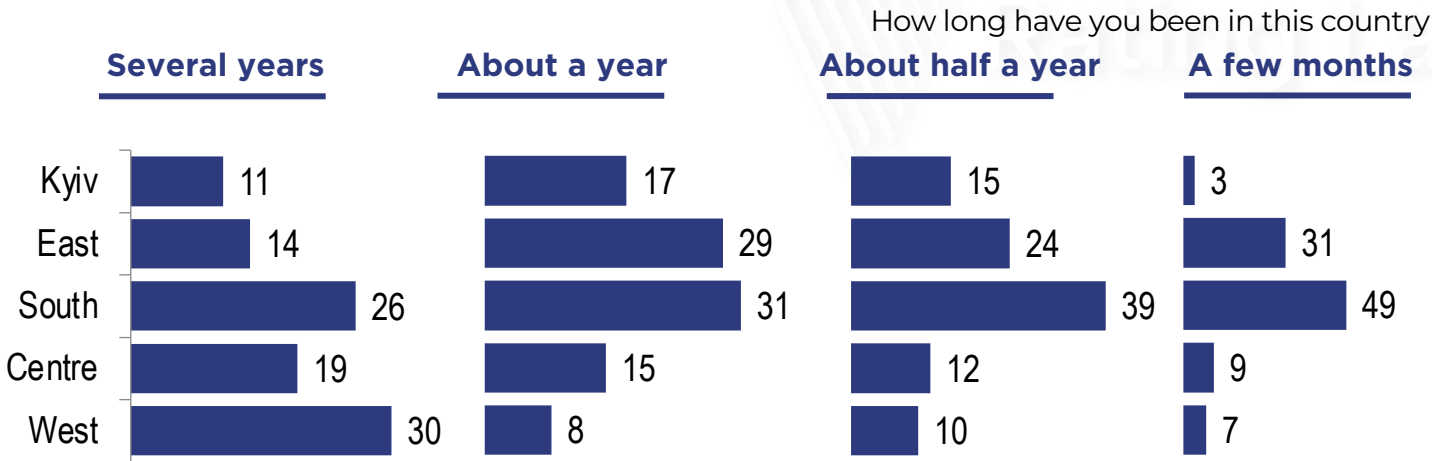
SECTION 1

Duration of stay in the country. Life in Europe

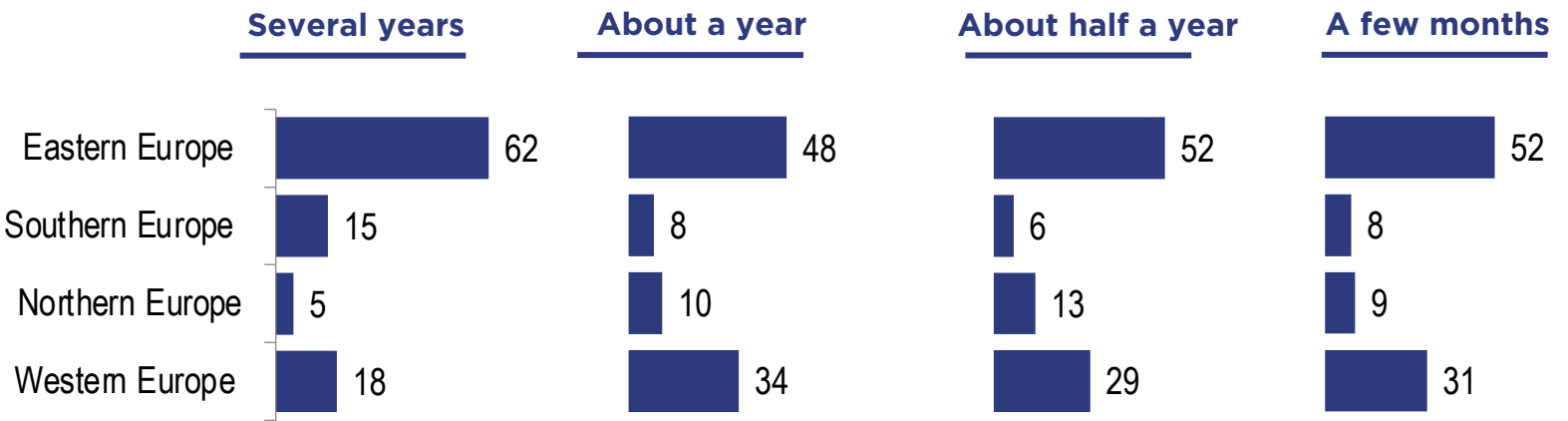




Region WHERE Ukrainians came to Europe FROM

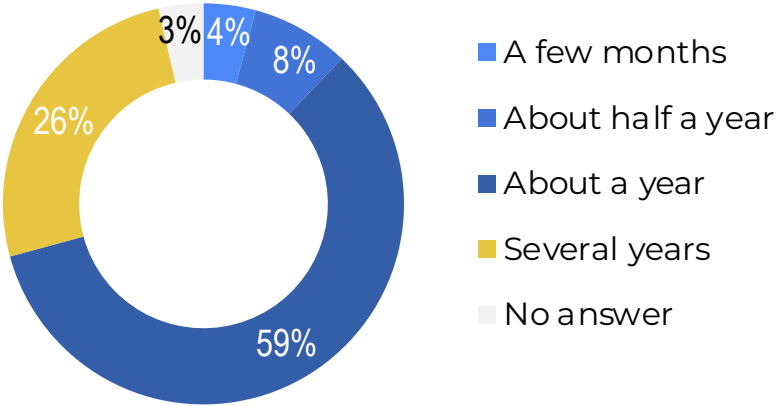


Region WHERE Ukrainians came to Europe



Duration of stay in the country

How long have you been in this country?

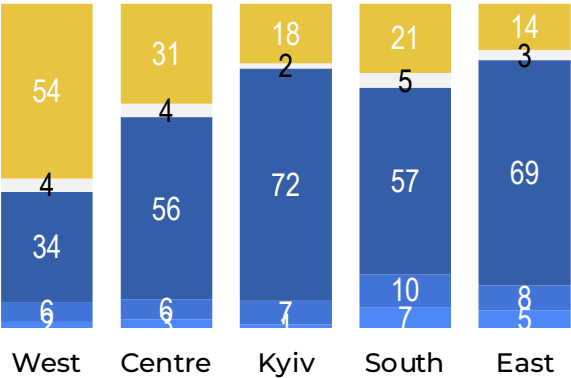


The bulk of respondents (59%) have been in Europe for about a year – this is the first group of migrants at the beginning of a full-scale invasion. Most of them are Ukrainians who left the East of the country and the capital.

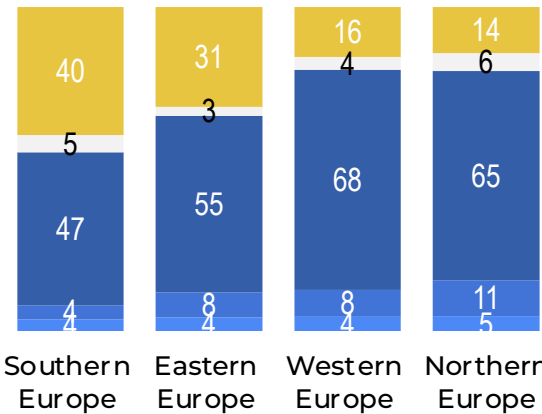
Another 8% have been in Europe for about half a year and 4% for a few months. Most of them are among the Ukrainians who left the South, in particular, because of the explosion of the Kakhovskaya hydroelectric power station.

At the same time, a quarter of respondents have been in the country for several years. Most of them are Ukrainians who left the West and Centre of the country, most likely to earn money.

Region where Ukrainians came to Europe FROM UKRAINE



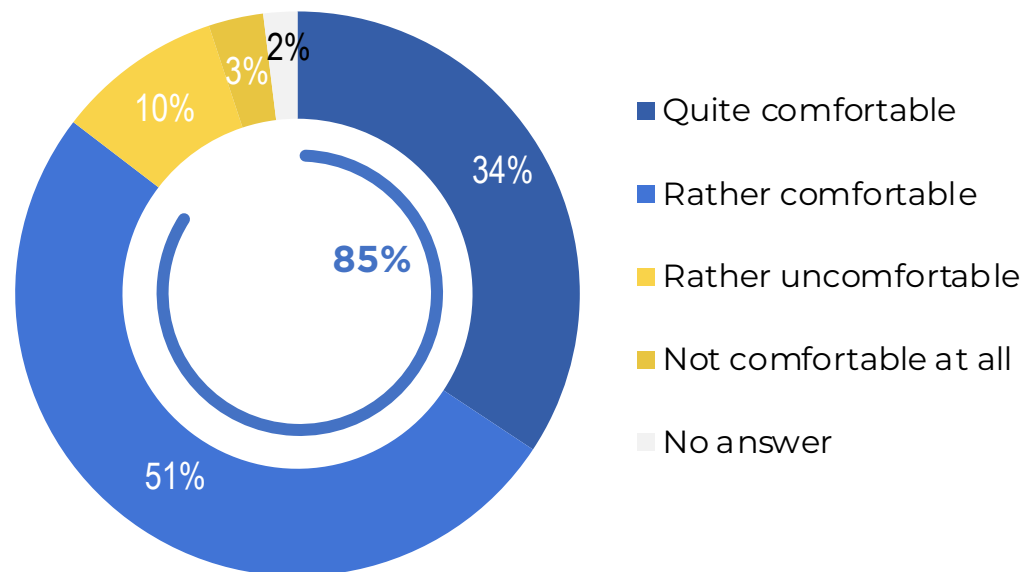
Region where Ukrainians came TO EUROPE



And if those **who have been abroad for several years more often live in Southern and Eastern Europe, those who arrived after and during the full-scale invasion are more often in the countries of Western and Northern Europe.**

Living conditions

How would you rate your living conditions in the host country?



According to the survey results, our citizens live in Europe in completely (34%) or rather (51%) comfortable conditions, and only 13% have uncomfortable conditions. Comfortable conditions for 85% of citizens can act as another argument for further stay abroad.

Comfortable conditions depend on:

- **Region.** The best living conditions are in Northern Europe (90% live in comfortable conditions), while Eastern (84%) and Southern Europe (83%) are less so;
- **Income.** The well-off have comfortable conditions in 93% of cases (half of them are quite comfortable), while among the poor only 74% of them (only 18% are quite comfortable) and their current income level does not allow for better living conditions;
- **Duration of stay in the country.** The most comfortable conditions have those Ukrainians who have lived in the country for several years (89%). Although those who have arrived recently have quite decent living conditions (about 80%). This indicates that countries from all corners of Europe have been able to provide Ukrainians with good living conditions, as the difference between the groups is not significant.

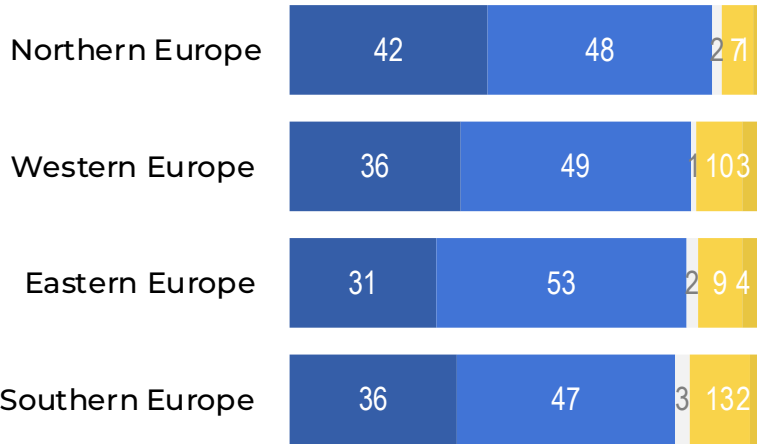


Living conditions

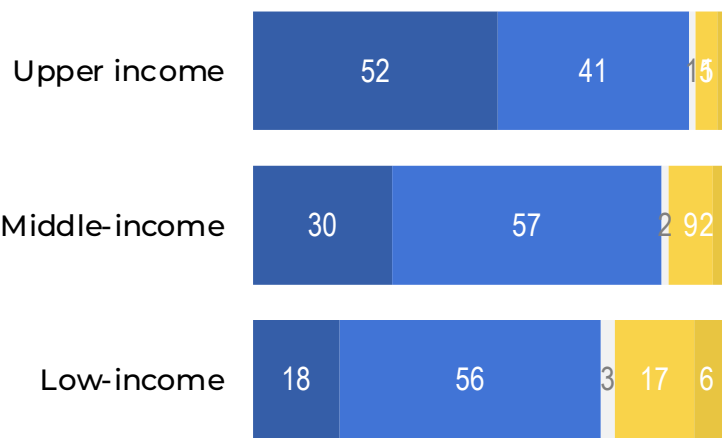
How would you rate your living conditions in the host country?

■ Quite comfortable ■ Rather comfortable ■ No answer ■ Rather uncomfortable ■ Not comfortable at all

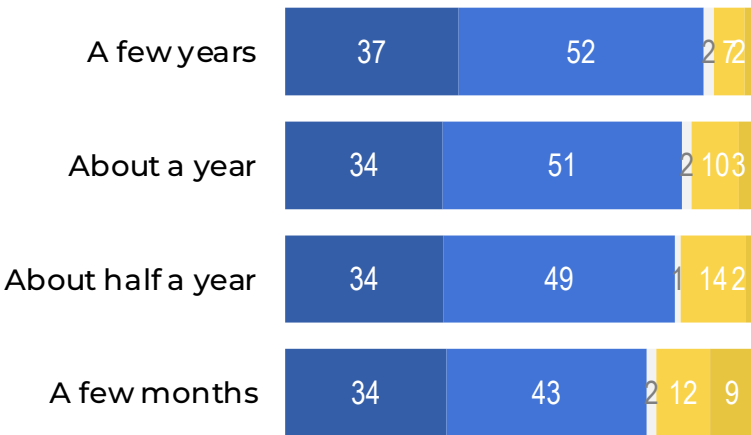
EUROPEAN REGIONS.



INCOME

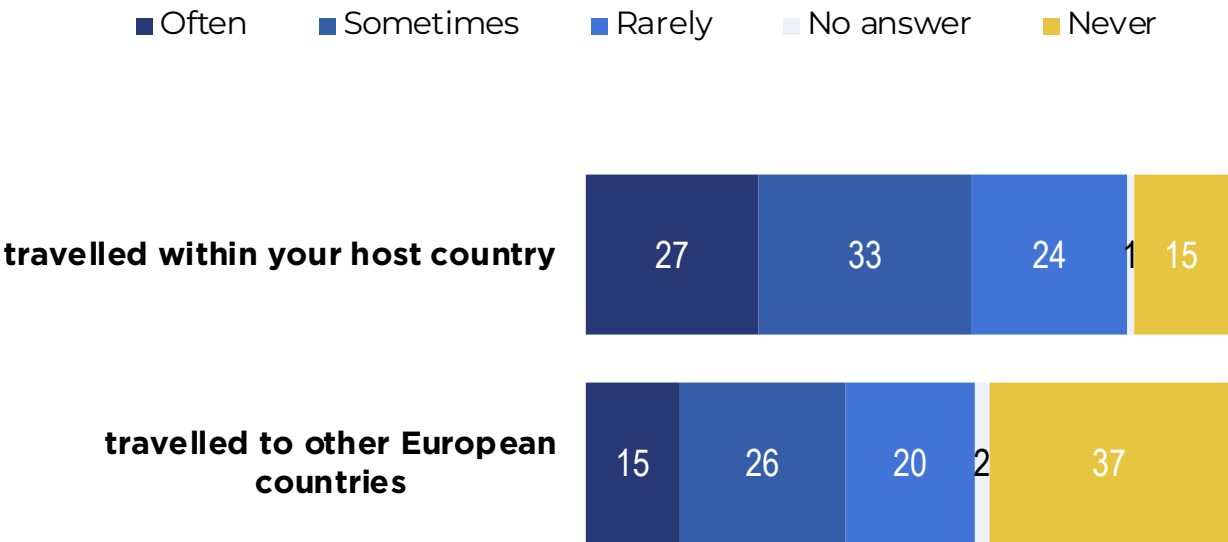


DURATION OF STAY



Travelling in Europe

How often have you travelled in the last year?



Ukrainians have an interest in and travel in Europe. The host country was often travelled by 27% of respondents, sometimes – by 33%. Other European countries – 15% and 26% respectively. Perhaps some of them travel frequently to Ukraine and therefore it is a hobby and a habit, but most of them probably enjoy the chance to see Europe, because foreign tourism, although visa-free, is quite expensive for ordinary citizens. Such new habits lead to changes in experience, broadening of outlook, increase of cultural level, cognitive activity, and contribute to socialization and adaptation in the host country.

Youth travel the most because they are the most mobile, have fewer obligations, less burdensome circumstances, and are more easygoing. The amount of travelling gradually decreases with age.

Those who have lived in the host country longer travel to Europe more often than those who arrived later. By income level, the well-off travel the most because they can afford it, and the less well-off travel the least. Overall, income has the greatest impact on the ability to travel.

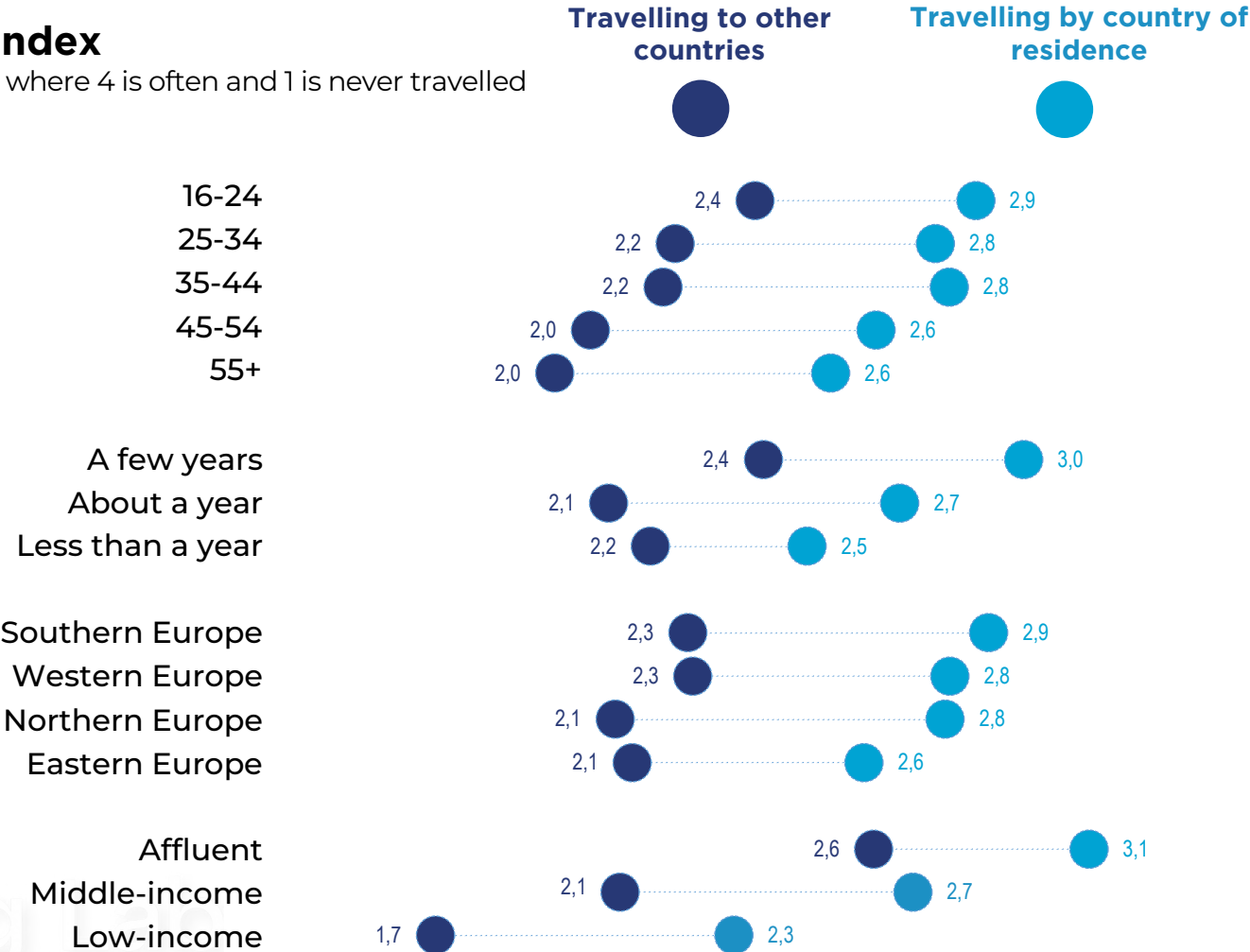
By region, Ukrainians who are in Eastern Europe travel the least, and Ukrainians who are in Southern Europe the most.



Travelling in Europe

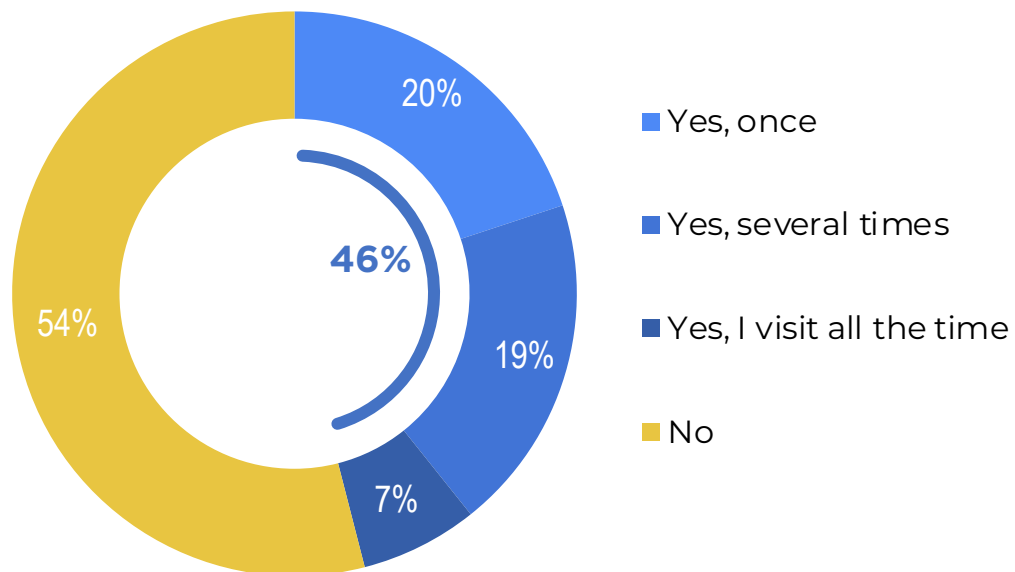
Travel Frequency Index

The value ranges from 1 to 4, where 4 is often and 1 is never travelled



Travelling to Ukraine

Have you visited Ukraine at least once during your stay in this country?



Ukraine was visited by 46% of those who left. So, more than half of our citizens who left have never been home during their stay abroad. It is important that among those who left during the war – 60% have never visited Ukraine. Men visit their homeland less frequently (69% have not visited Ukraine even once) than women (51%) because they probably feel the risk of travelling to Ukraine as they may not be allowed to come back. IDPs with children are also less likely to travel home, perhaps for security reasons or because it is more difficult to endure the long journey. Respondents in Eastern Europe are relatively more likely to go home, as it is the closest to the border and also has more Ukrainians who moved here before the invasion. Accordingly, Ukrainians who left the West of the country go home most often.

On the contrary, the majority of residents of the East of the country (64%), who fled the war, have never been to Ukraine. The situation is similar for residents of the South (60%).

The East and the South are hotspots, active fronts and hostilities, more shelling takes place in these regions, so probably for security reasons, citizens from these regions do not come. In addition, part of the East and South is under occupation, many cities and towns are partially or destroyed, and there is simply nowhere to come, even if you want to.

So, the most **common people going home are mostly women, without children, and people with high incomes, from the Western and Central regions of Ukraine, who have been living for several years in Eastern Europe.**

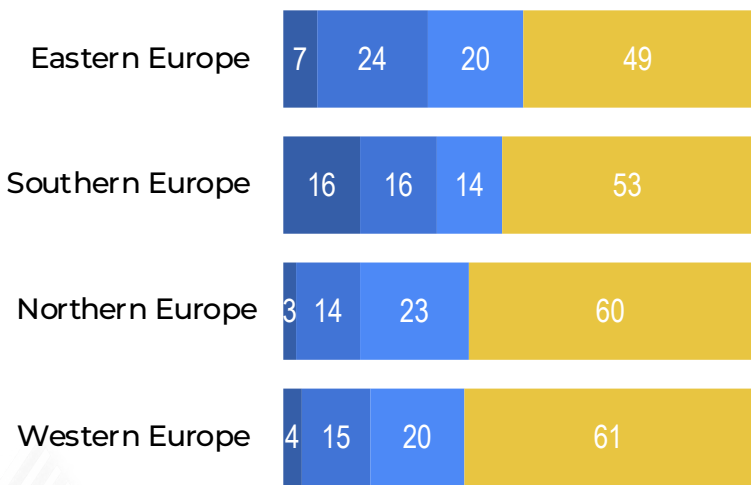


Travelling to Ukraine

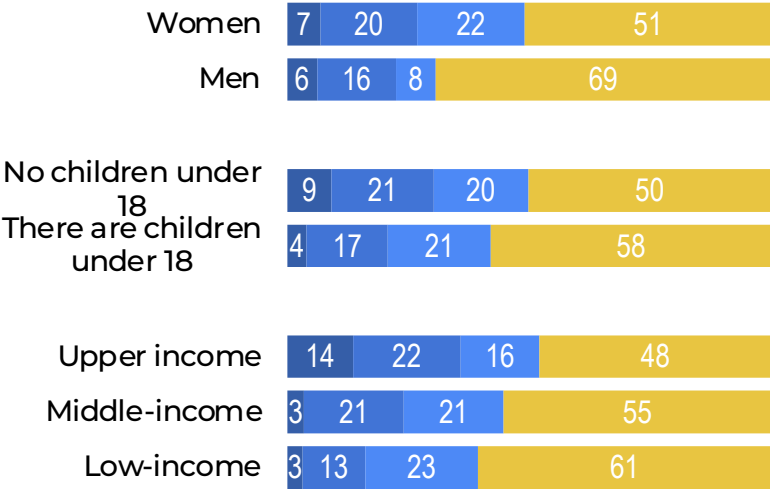
Have you visited Ukraine at least once during your stay in this country?

■ Yes, I visit all the time ■ Yes, several times ■ Yes, once ■ No

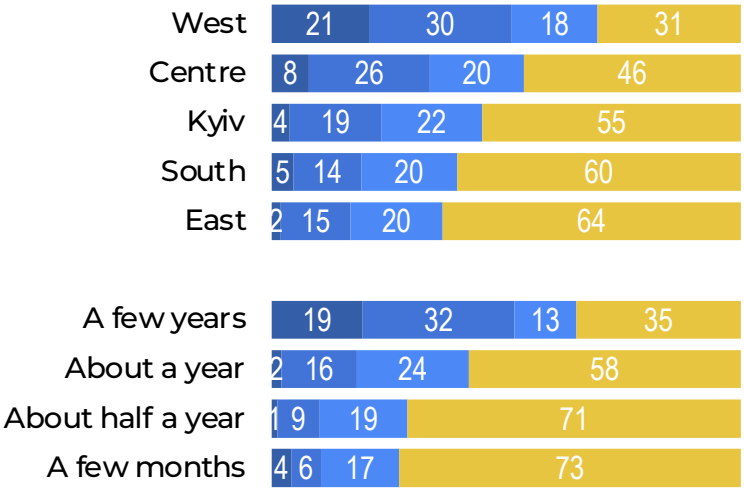
EUROPEAN REGIONS.



GENDER. PRESENCE OF CHILDREN. INCOME



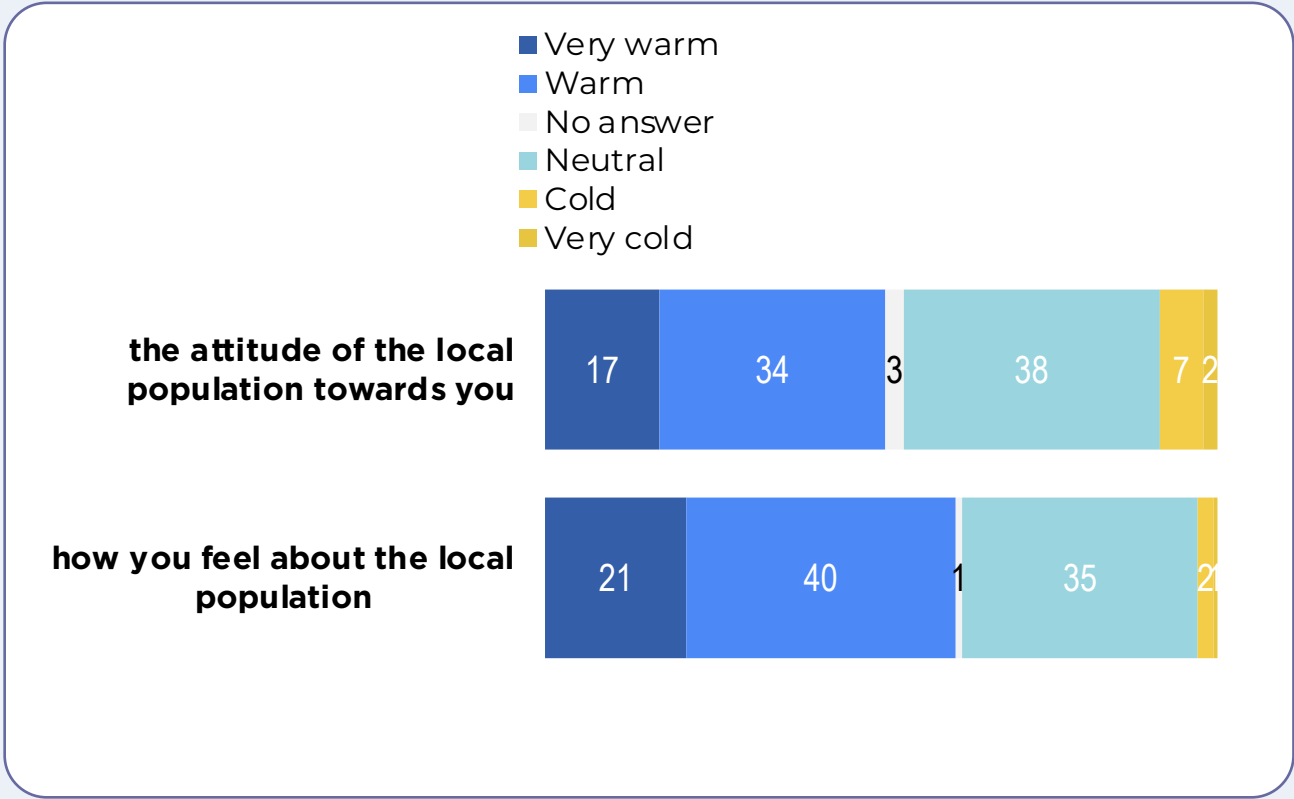
UKRAINIAN REGIONS. DURATION OF STAY





Relationships with locals

How would you rate the attitude of...?



The attitude of the local population toward Ukrainians is generally assessed positively: 51% say they have a positive attitude, and 38% say they are neutral. Only 9% encountered a cold attitude.

The attitude of Ukrainians to locals is even better assessed: 61% have a warm attitude, 35% are neutral and only 3% are cold.

This good attitude is because Europe and Europeans have accepted our citizens, and provided them with shelter, social protection, opportunities to study and work, and to live in safety.

Consequently, this attitude is to a certain extent conditioned by gratitude for such a position of Europe.

Attitudes on both sides are the best in Northern Europe, the least warm in Eastern Europe. Women are somewhat better at assessing relations with locals, men are emotionally more reserved. People who left immediately after the invasion feel better treated than those who arrived more recently or lived before the invasion. Incidents of discrimination have an impact: where such incidents have occurred, attitudes are more neutral. However, in none of the categories does the advantage of a cold attitude occur (no minus values in the index). Significantly, young people experience a cool attitude toward local people much more often than older people.

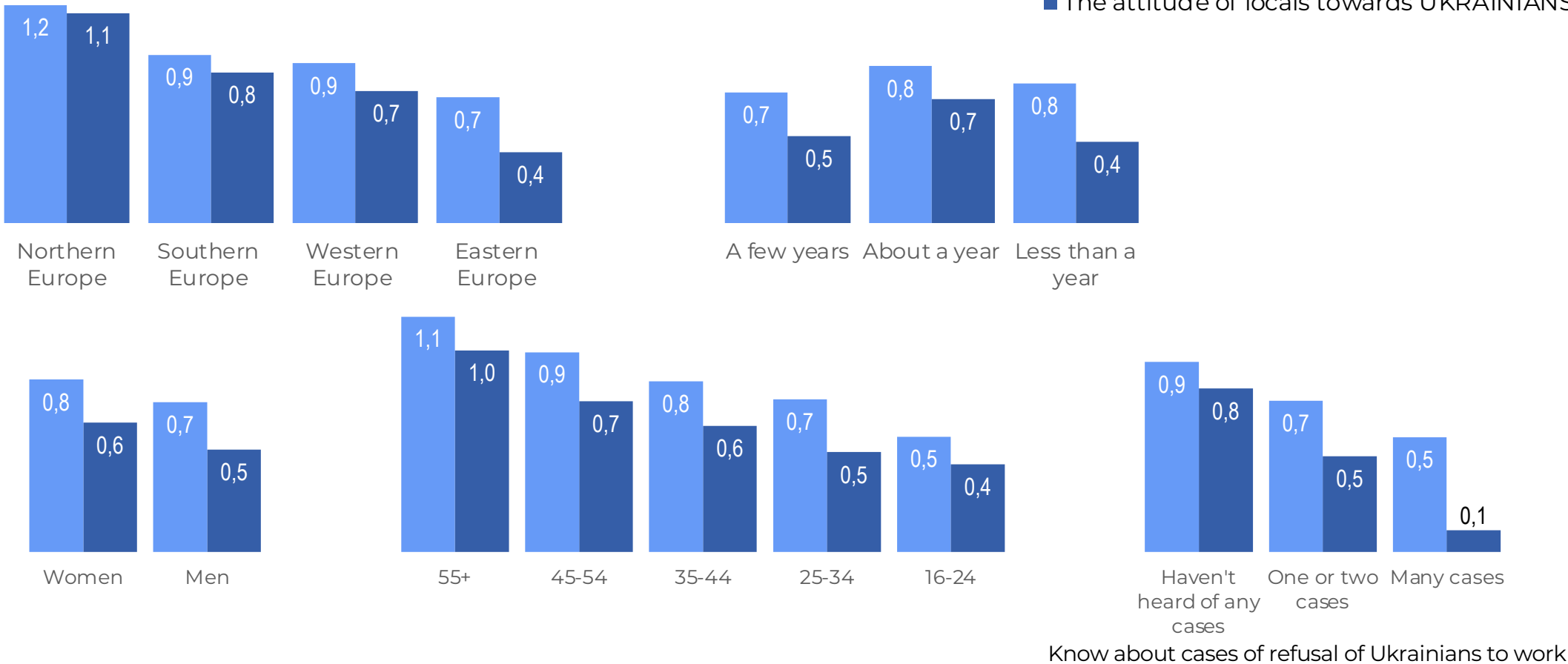


Relationship with local people

Relationship index

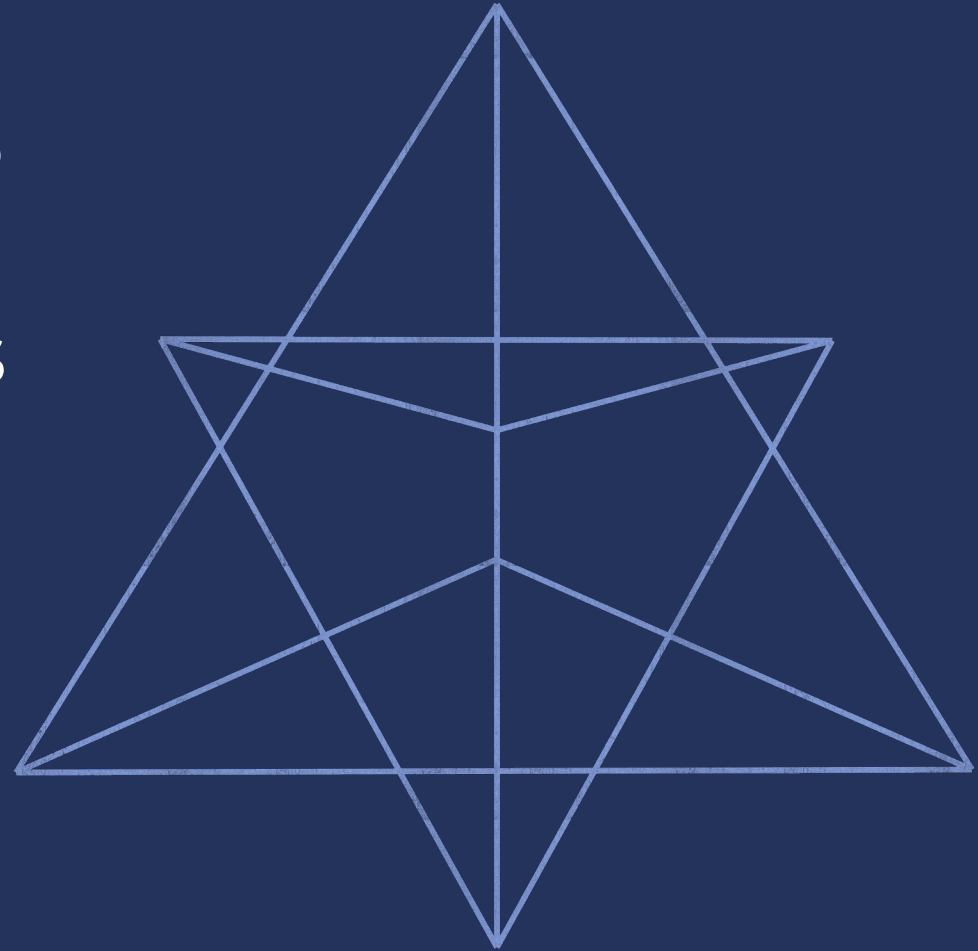
The value ranges from -2 to 2, where 2 is a very warm attitude, -2 is very cold,

- The attitude of Ukrainians to LOCALS
- The attitude of locals towards UKRAINIANS



SECTION 2.

Comparison of Ukraine with the host country. Opportunities, services and facilities in Europe and Ukraine

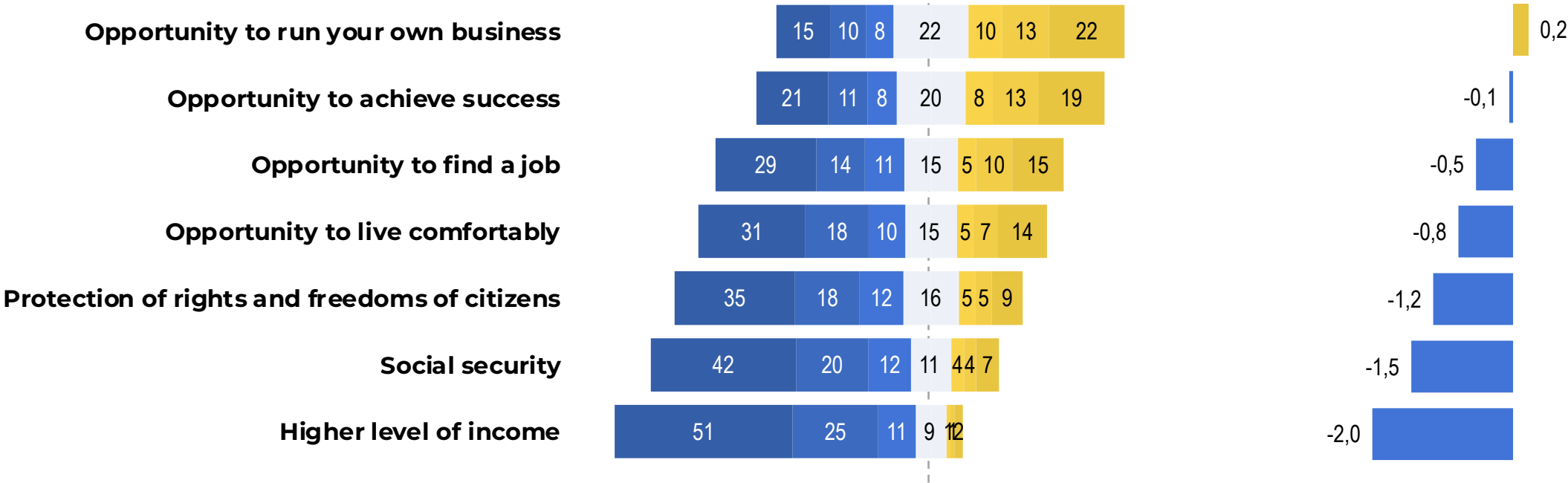


Comparison of OPPORTUNITIES

In your opinion, where is the best level of such opportunities?

Index
ranges from -3 to 3, where -3 is better in a European country, 3 is in Ukraine.

Better in a European country ← Better in Ukraine →



Comparison of OPPORTUNITIES

In general, opportunities in Europe are better than in Ukraine, especially in income (87% better in Europe, against 3% better in Ukraine), social security (75% against 15%), protection of rights and freedoms of citizens (67% against 19%), opportunities to live comfortably (60% against 26%), to find a job (54% against 30%).

According to the respondents, Eastern and Southern Europe loses to Northern and Western Europe in the issues of social security and the protection of rights and freedoms of citizens.

According to the respondents, it is possible to achieve success both in Europe (40%) and in Ukraine (41%), but doing business in Ukraine (45%) is still somewhat better than in Europe (34%), which is probably due to a better understanding of how the process works, how to start it and how to develop it in one's own country.

Incomes are higher in Europe and, even having lost more skilled jobs here in Ukraine, less skilled jobs are better paid in Europe. Poverty and social insecurity have been inherent in our society for decades, so to finally have social protection looks attractive. The rule of law is not a strong point of Ukrainian society either, that is why it is judicial reform that is the most popular in Ukrainian polls. The possibility to live comfortably is also an advantage of Europe, which is closely connected with social protection, rights and higher incomes.

Success is an abstract category, but here, as the correlation analysis shows, it is significantly related to opportunities to do business (0.58**), find a job (0.52**) and live comfortably (0.51**).

	Factor 1	Factor 2
Social security	.867	
Protection of citizens' rights and freedoms	.805	
Opportunity to live comfortably	.609	
Higher level of income	.608	
Opportunity to achieve success		.813
Opportunity to run your own business		.802
Opportunity to find a job		.703

The results of factor analysis (total variance 64%) allow us to conditionally categorize opportunities into 2 groups (factors): 1) protection and income; 2) achievements and employment. Comfort concerns both groups, although more often it falls into group 1. Europe unambiguously wins in protection, good income is also a kind of protection and an opportunity to ensure more comfortable living conditions – and this is a significant argument for why Ukrainian citizens choose Europe. In achievements and success, not everything is not so unambiguous, because it is possible to do business in Ukraine, as well as to achieve success than to provide oneself with comfort, but to find a job is better in Europe. Although those who have not been able to find a job abroad - assess that employment opportunities are better in Ukraine.

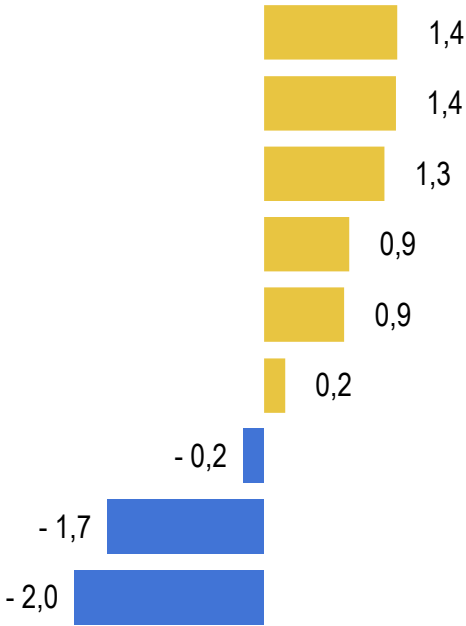
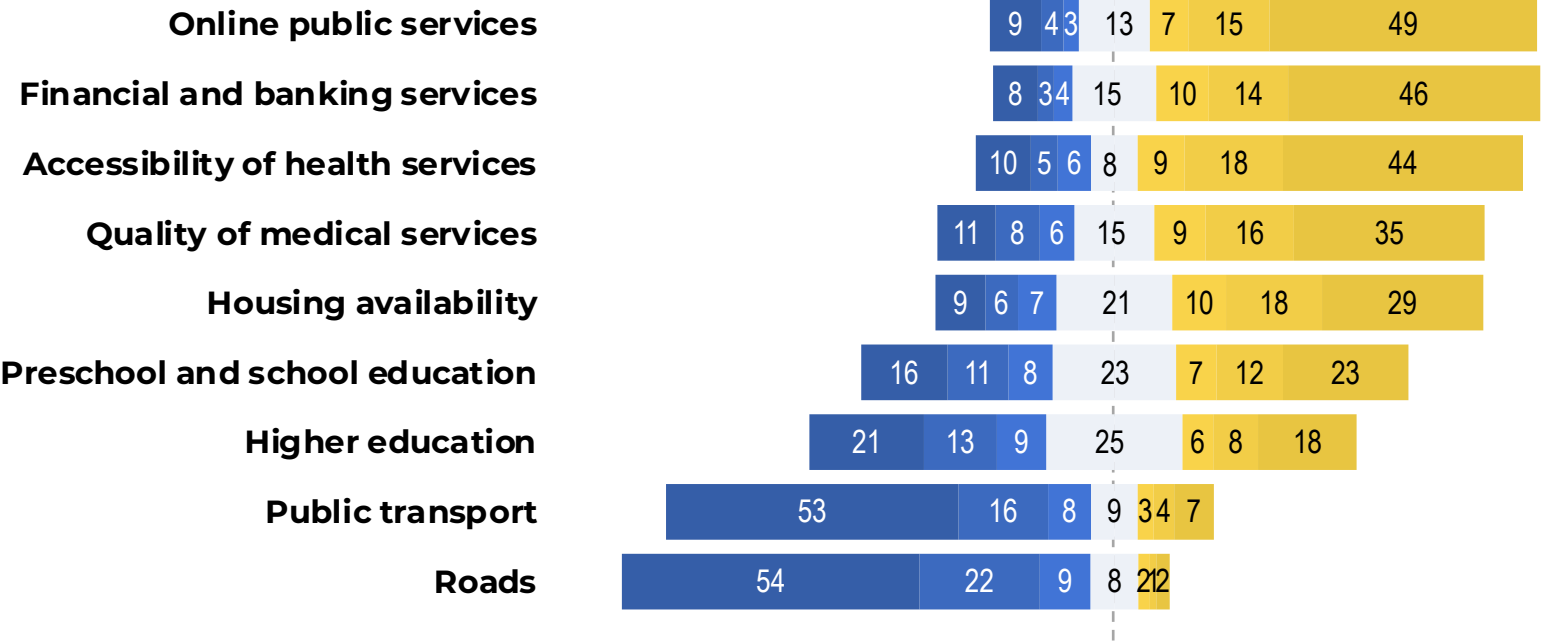
Comparison of SPHERES and SERVICES

In your opinion, where is the best level of such spheres and services?

Services Index

ranges from -3 to 3, where -3 is better in a European country, 3 in Ukraine.

Better in a European country ← Better in Ukraine →





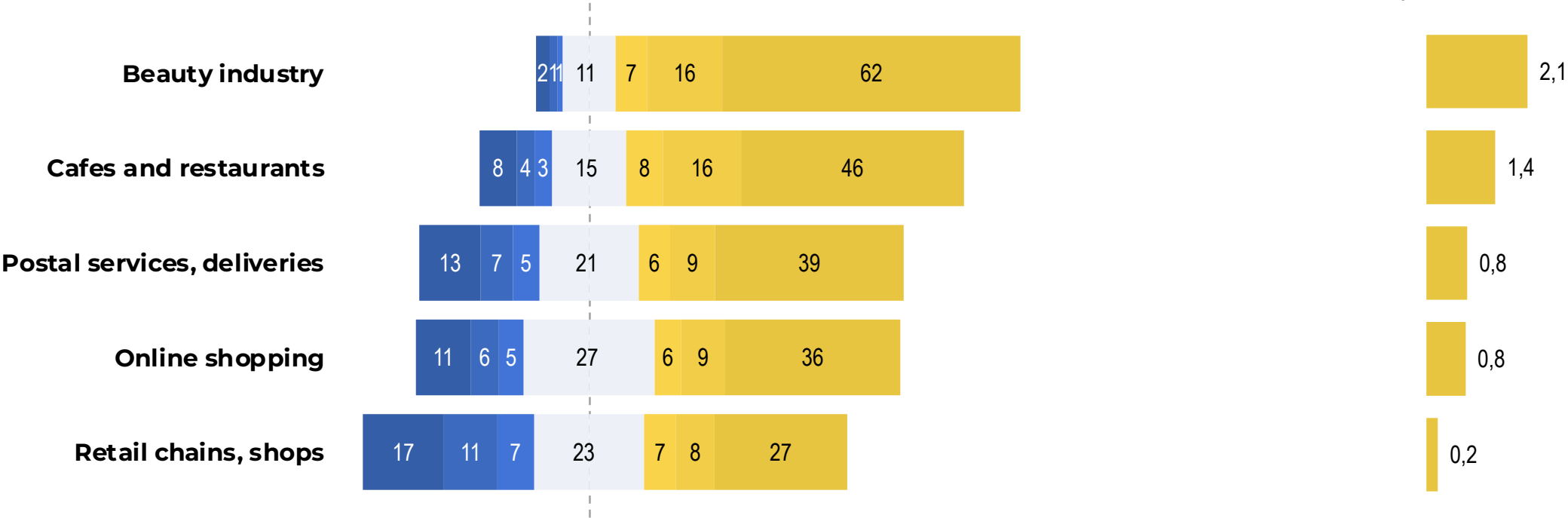
Comparison of SPHERES and SERVICES

In your opinion, where is the best level of such spheres and services?

Services Index

ranges from -3 to 3, where -3 is better in a European country, 3 in Ukraine.

Better in a European country ← Better in Ukraine →



Comparison of opportunities and spheres

Government online services in Ukraine are rated significantly better (71%) than in Europe (16%). Financial and banking services are also significantly better in Ukraine (70% vs. 14% in Europe).

Ukrainians also assessed the sphere of medicine better in Ukraine than in Europe. In particular, both the availability of medical services (71% vs. 21%) and the quality of medical services (60% vs. 25%).

At the same time, evaluations of education were divided. If preschool and school education is slightly better in Ukraine (42%) than in Europe (35%), then higher education is the opposite: slightly better in Europe (43%) than in Ukraine (32%). Ukrainian students of European universities agree more than others that higher education is better in Europe.

The absolute majority of Ukrainians surveyed agreed that public transport in Europe is much better (77%) than in Ukraine (14%). The same opinion about European roads, which are considered better there (85%) than in Ukraine (5%).

But the respondents consider housing in Ukraine more affordable (57%) than in Europe (22%) because it is cheaper to rent and even cheaper to buy, and for renting it is necessary to go through fewer long and bureaucratic procedures, besides, in Europe Ukrainians are not citizens of the country, but have either a residence permit or asylum, which also does not contribute to the ability to rent or buy housing.

Differences depending on the region of residence of Ukrainians in Europe are not linear. Availability of housing, financial and banking services, and higher education there are almost no regional differences.

Minor differences are observed in public transport and roads. Northern Europe has the best indicators in pre-school and school education, which in other regions of Europe loses to Ukraine. The Finnish, Swedish and Norwegian school systems are known for their approach to children`s learning and socialization and are recognized not only in Ukraine but also in the world.

Online public services are also the best in Northern Europe, although they do not have an advantage over Ukrainian services. And the worst, according to Ukrainians, online services are in Western Europe.

The availability of medical services in Eastern and Northern Europe is worse than in Western and Southern Europe. Also, their quality, which in Eastern Europe most of all loses to Ukrainian ones.

In addition, according to Ukrainians, the beauty industry in our country is much better (85%) than in Europe (5%). Also in Ukraine are better: cafes and restaurants (60% vs. 16%), postal and delivery services (54% vs. 25%). Online shopping in Ukraine is also considered to be better (51%) than in Europe (22%), but regarding retail chains and shops opinions are divided: 42% consider them the best in Ukraine, and 36% - in Europe.

The region of residence doesn't make much difference except in the South of Europe, where cafes and restaurants, the beauty industry and shopping scored relatively better because it is a traditional resort region and has the best conditions for tourists.



Comparison of opportunities and spheres

The results of factor analysis (total dispersion 57%) allow us to conditionally distribute spheres and services into 3 groups (factors): services and services; social and humanitarian sphere; infrastructure, - only the last one is completely behind Europe. Services, and socio-humanitarian issues (education, medicine) are generally behind Ukraine.

Europe is work, defence, income, comfort, and infrastructure.

Ukraine is services and facilities, including medical and partly educational services, business opportunities, and affordable housing.

Success is equally possible in Ukraine and Europe.

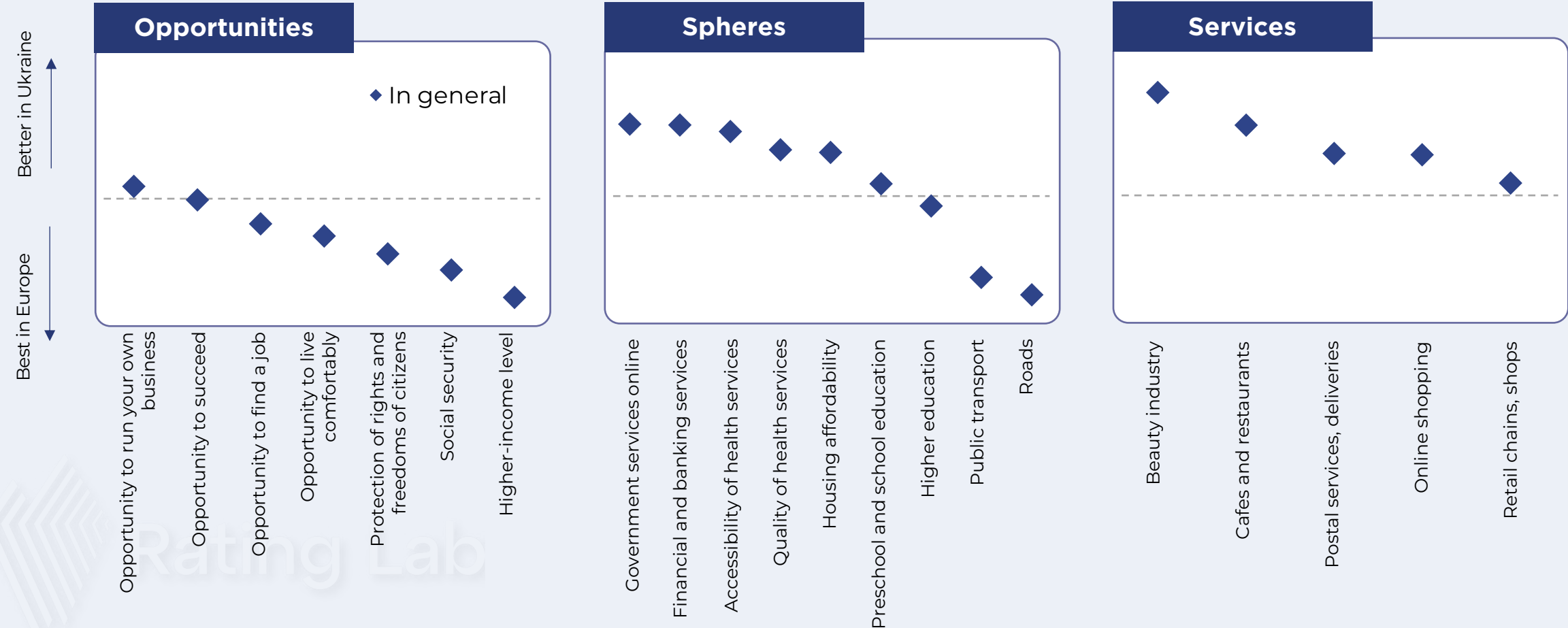
	Factor 1	Factor 2	Factor 3
Online shopping	.760		
Financial, banking services	.723		
Cafes and restaurants	.720		
Postal services, deliveries	.716		
Government online services	.685		
Beauty industry	.662		
Trade networks, shops	.655		
Quality of medical services		.762	
Availability of medical services		.753	
Preschool and school education		.702	
Higher education		.661	
Housing availability		.474	
Public transport			.754
Roads			.726



Comparison of opportunities and spheres

In general

The index ranges from -3 to 3, where -3 is better in a European country, 3 in Ukraine



Comparison of opportunities and spheres

There is a clear dependence: the longer Ukrainians stay abroad, the better they evaluate the country of stay.

All those who have recently arrived evaluate Ukraine better, followed by those who have been living for about a year – both groups have not yet adapted, have not gotten used to it, and often moved not consciously in search of a better life, but because of the war. These are usually quick and not as informed decisions (other than security).

Those who have been living for several years and left Ukraine not because of the war, but just for better opportunities, their assessments are in favour of Europe. In addition, the situation with opportunities in Ukraine could have become better over the past few years.

Women better evaluate all opportunities, spheres and services in Ukraine, while men are more inclined towards Europe. Achievement and employment in Ukraine, most spheres and services look particularly attractive from the point of view of women. It is important, most women left after the full-scale invasion under the asylum programme, hence their assessments are those of refugees, not of people who deliberately chose to move abroad in search of a better life.

Only in one thing Ukrainian women and men have similar views – in assessing the level of income in Europe, the quality of European roads and that housing is more affordable in Ukraine.

Estimates by age of respondents are distributed rather tightly. Although in general older people are less demanding and give higher estimates of the country of stay than younger people. This is especially true for state online services, banking services, delivery services, shopping, cafes and restaurants, beauty industry – it is possible that the younger ones used such services more often in general and evaluate them better in Ukraine.

In the availability and quality of medical services, and housing affordability, the elders also see somewhat fewer advantages of the Ukrainian system.

Youth (16-25 years old) evaluate higher education in Europe somewhat better because it is their priority, they may have already met with it, because they study in Europe or are considering such a possibility.

Opportunities to find a job are most sensitive to employment: those who for various reasons do not have a job in Europe rate opportunities to find one in Ukraine better. Since work is directly related to the understanding of success, those who are not working evaluate the achievement of success in Ukraine better.

There is another clear dependence: the higher the respondents' income, the better assessments they give to the country of residence. The biggest difference is in the evaluations of people whose income has worsened or not changed with the move.

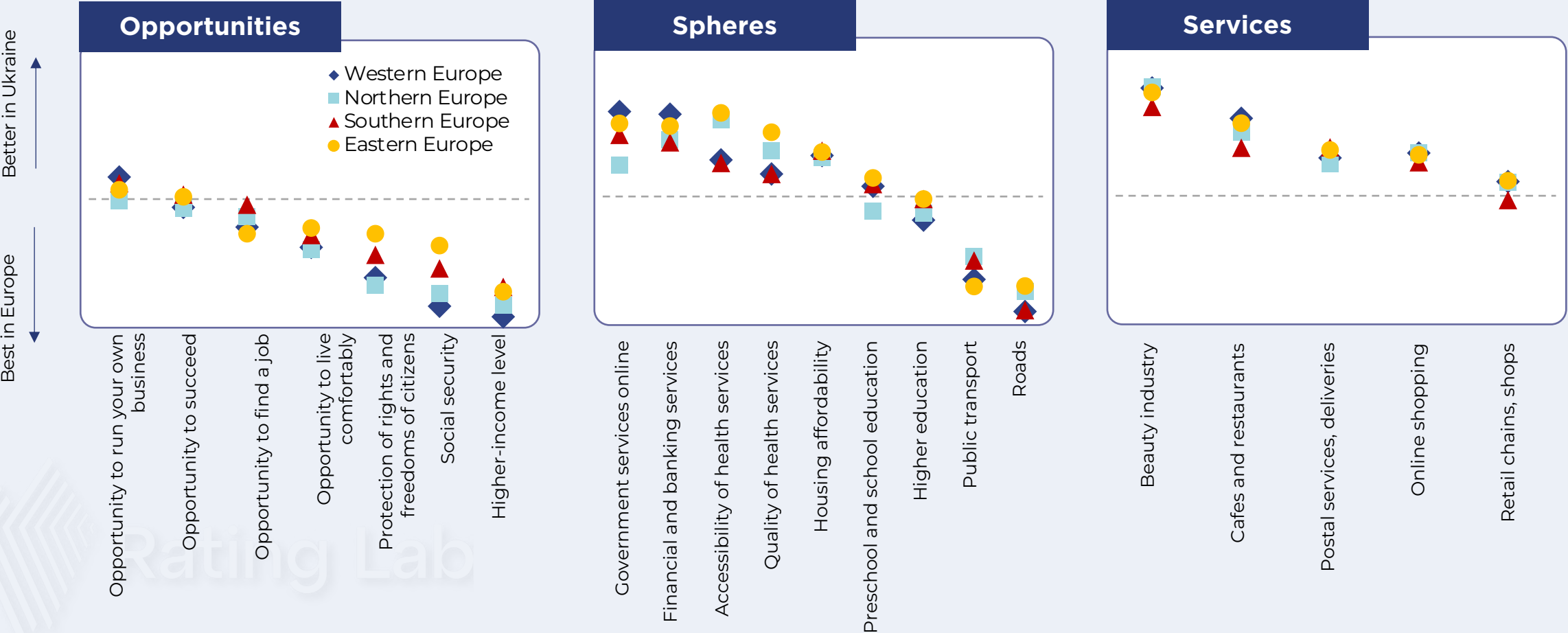
Income is correlated with an understanding of opportunities: people with high incomes tend to have greater achievement motivation, goal setting, and awareness of opportunities and their utilisation. People with low incomes are more likely to be motivated by failure avoidance, rely more on others, and find it difficult to operate in new environments, and to see new opportunities, especially in the circumstances in which they found themselves abroad.



Comparison of opportunities and spheres

Regions of Europe

The index ranges from -3 to 3, where -3 is better in a European country, 3 in Ukraine

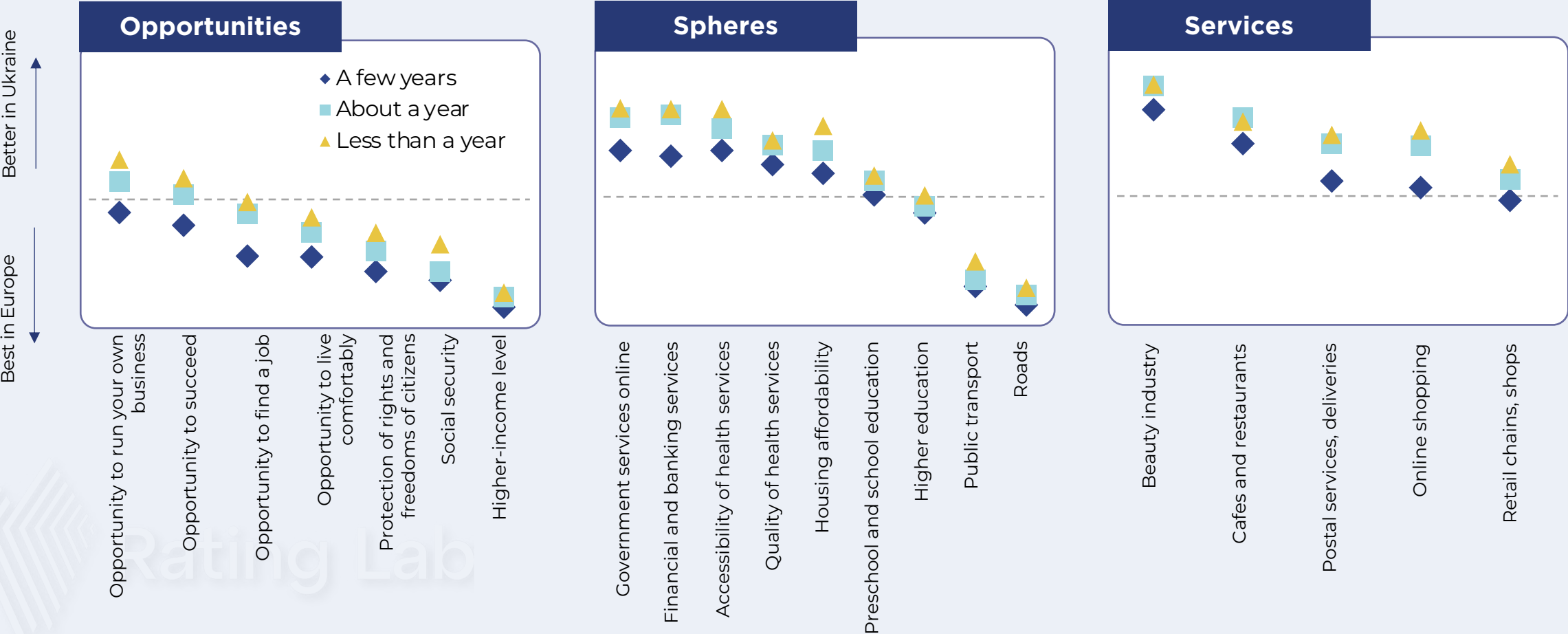




Comparison of opportunities and spheres

Duration of stay

The index ranges from -3 to 3, where -3 is better in a European country, 3 in Ukraine

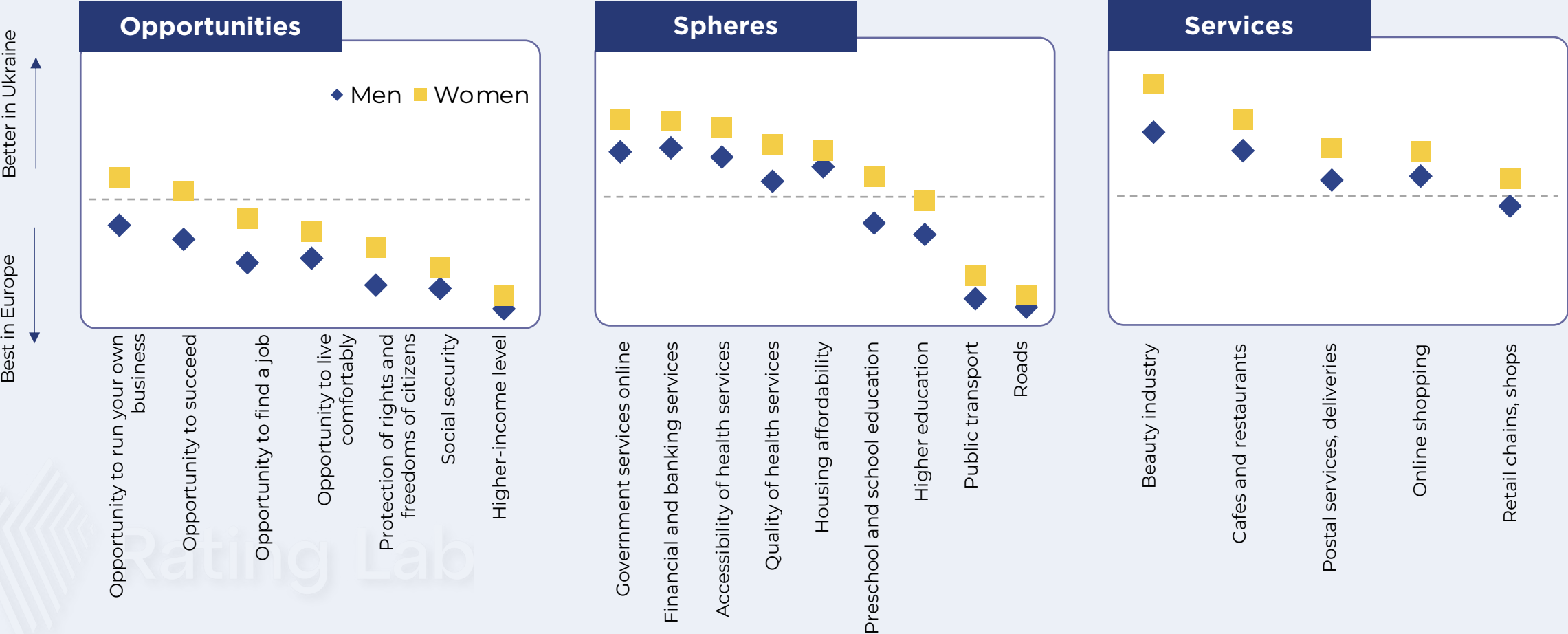




Comparison of opportunities and spheres

Sex

The index ranges from -3 to 3, where -3 is better in a European country, 3 in Ukraine

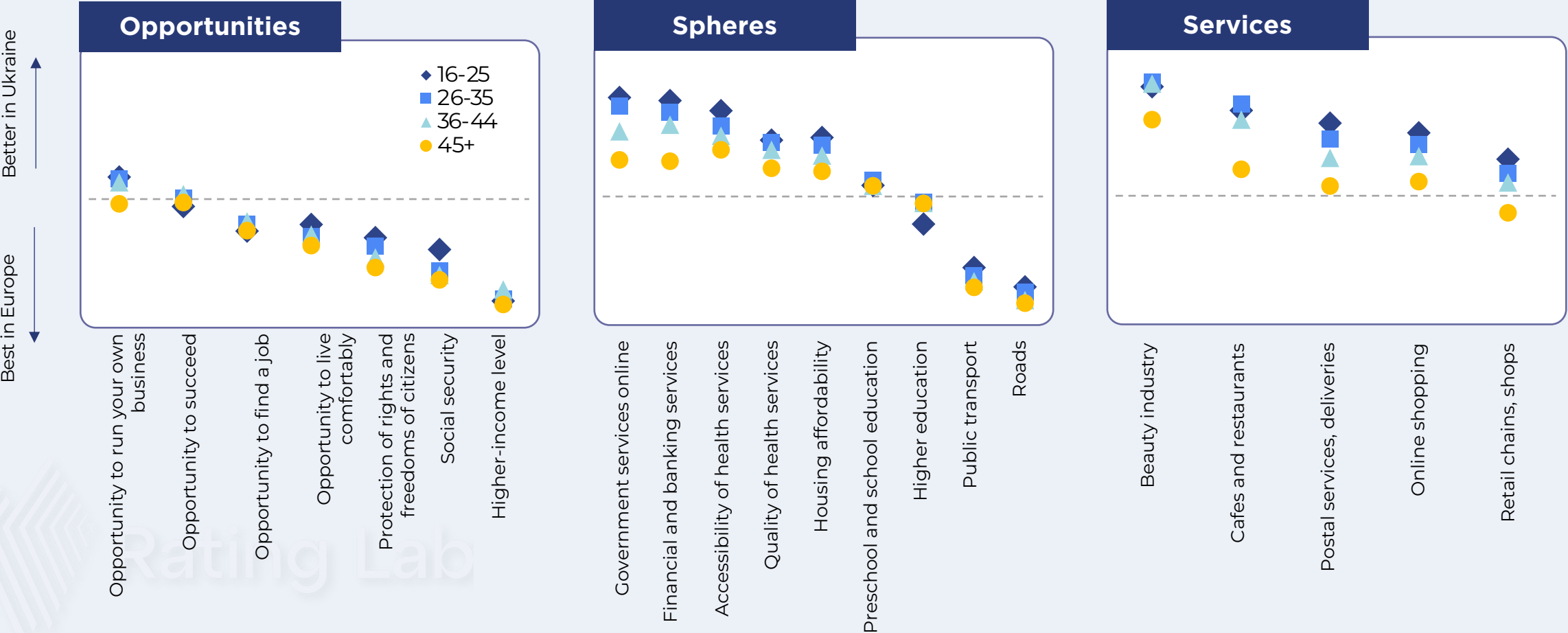




Comparison of opportunities and spheres

Age

The index ranges from -3 to 3, where -3 is better in a European country, 3 in Ukraine

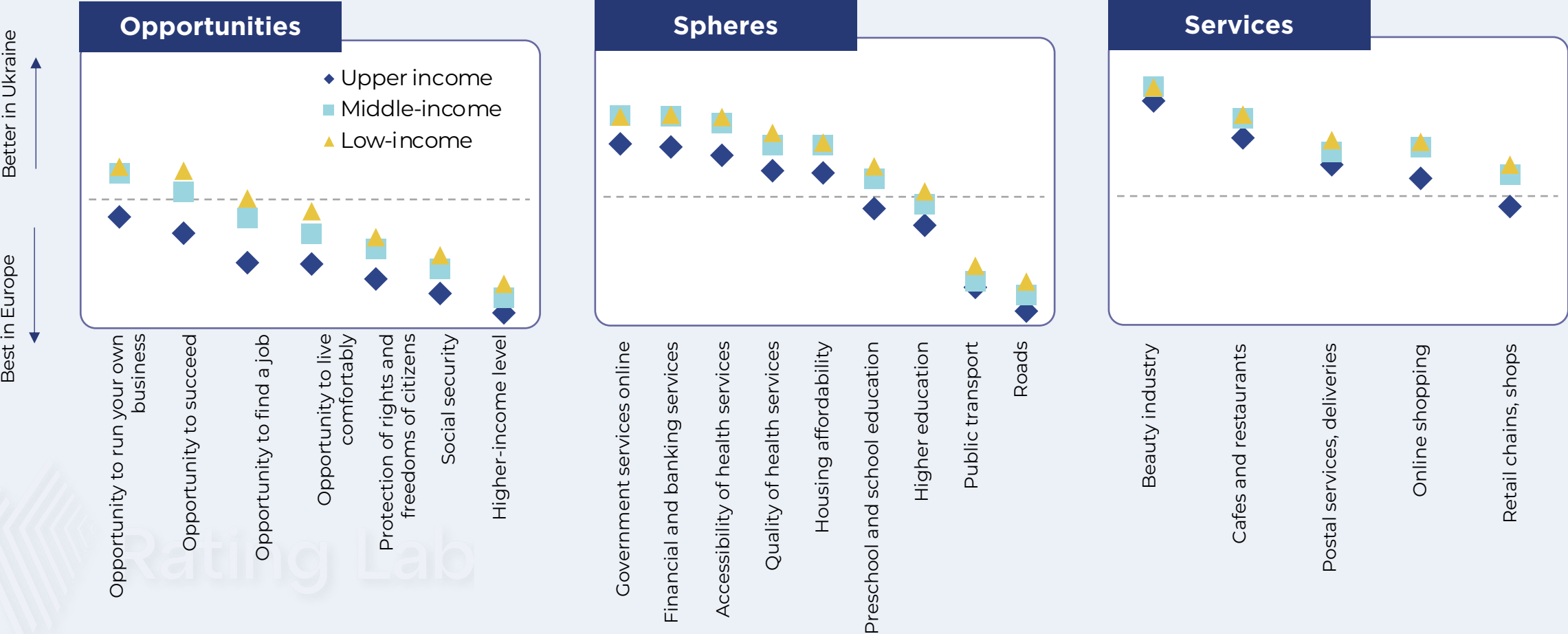




Comparison of opportunities and spheres

Income

The index ranges from -3 to 3, where -3 is better in a European country, 3 in Ukraine

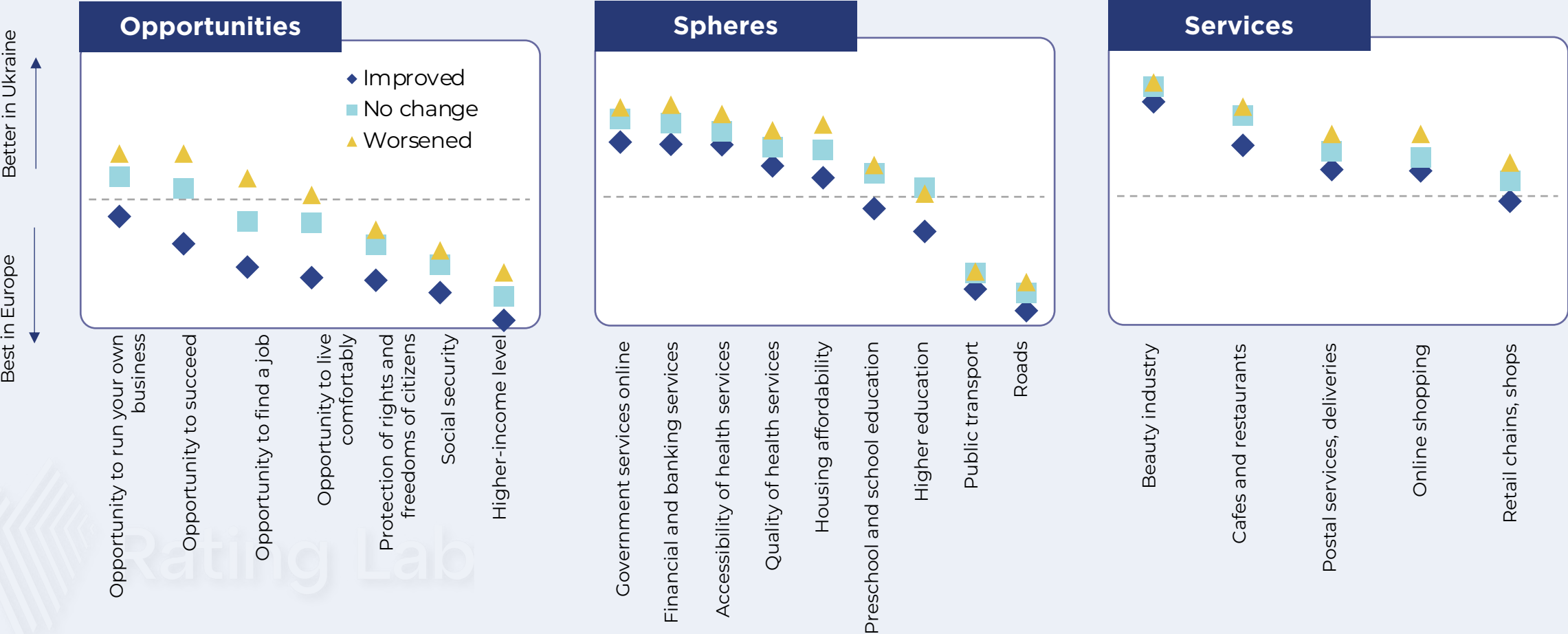




Comparison of opportunities and spheres

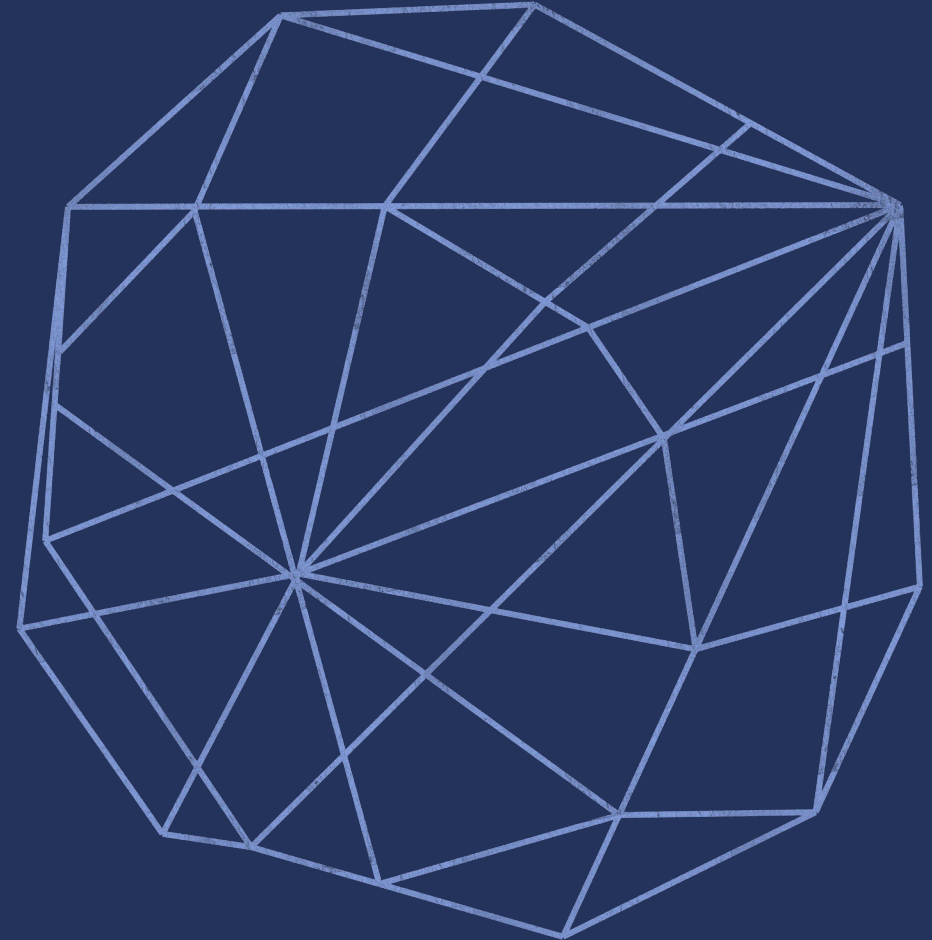
Change in income

The index ranges from -3 to 3, where -3 is better in a European country, 3 in Ukraine



SECTION 3

Corruption, bureaucracy, taxes





Comparison of Ukraine with the host country

In your opinion, where is the higher level of...?

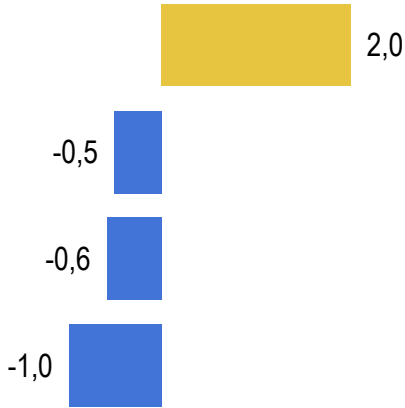
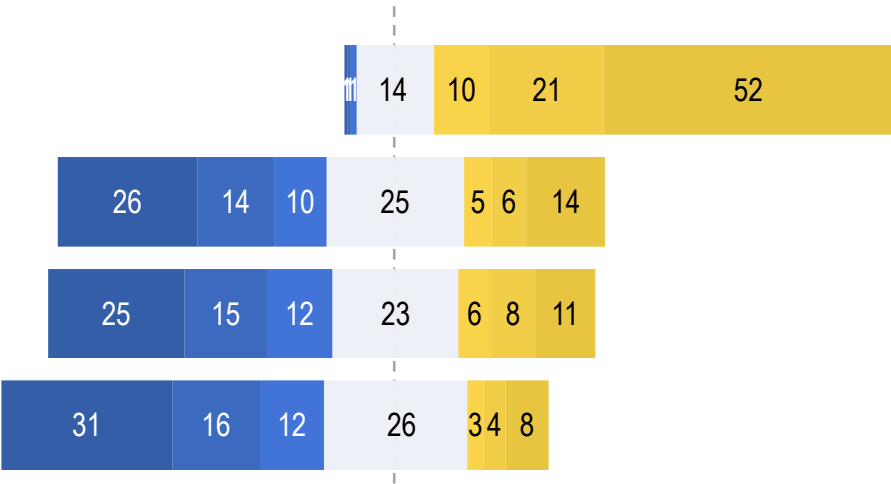
Restrictions index

ranges from -3 to 3, where -3 is better in the European country, 3 in Ukraine

HIGHER in the host country HIGHER in Ukraine

Higher in Europe Higher in Ukraine

- Higher level of corruption
- Higher level of bureaucracy
- Greater economic freedom
- Higher rate of taxation



Comparison of Ukraine with the host country

Ukraine loses very much to European countries in the level of corruption, but in terms of bureaucracy and taxation rates, most people believe that the climate at home is more favorable than in Europe.

84% believe that the level of corruption is higher in Ukraine than in Europe (3%). But the level of bureaucracy is higher in Europe (50%) than in Ukraine (25%). Also, according to respondents, the level of taxation is higher in Europe (59%) than in Ukraine (16%). However, by the level of economic freedom Ukraine (25%) is inferior to Europe (52%), as well as by the level of income (3% vs. 87%).

Correlation analysis showed that there is a relationship between answers to the question about income and economic freedom ($r=0.41^{**}$ - the higher the economic freedom, the higher the income), and the level of bureaucracy is related to the rate of taxation ($r=0.34^{**}$ - the more bureaucracy, the higher the taxes). Also, the assessment of the high level of bureaucracy in the host country is directly related to the evaluation of government and financial online services, which are significantly worse in Europe compared to Ukraine. The highest bureaucracy and taxes are considered to be in Western European countries.

In addition, there is a negative correlation between the corruption question and income ($r = -0.32^{**}$ - the higher the corruption, the lower the income or the higher the corruption, the lower the economic freedom ($r = -0.21^{**}$). This is exactly what Ukraine is losing to Europe and it is directly related to corruption because where there is corruption, there is neither good income for the majority nor economic freedom. After all, economic opportunities are provided through corruption schemes.

4% of Ukrainians have bribed an official in the host country. The same number refused to answer. Most often it was in the countries of Southern Europe.

Compared to Ukraine, European countries look attractive when it comes to corruption: only 5% believe that there is a high level of corruption in the host country, 24% - medium, while in Ukraine it is 79% and 18% respectively.

At the same time, those Ukrainians who have paid a bribe in the host country assess the level of corruption in Europe as higher - 45% (medium or high level); among those who have not paid such only 27%. The most corrupt for our citizens were the countries of Southern (38% believe that corruption is present at a medium or high level) and Eastern Europe (35%), the lowest - in Western (14%) and Northern Europe (14%).

The assessment of the level of corruption is related to:

- **duration of residence:** the less one lives in the country, the lower one evaluates corruption: for those who live less than half a year corruption is present in 17 per cent; for several years - 33 per cent. They have less experience of interacting with various institutions and experience of living in the country in general, so their perceptions are more positive.
- **employment:** those who are studying are the best at assessing corruption: 23 per cent have not encountered it at all, only 19 per cent confirm its existence; and those who are employed have more social experience, so they are more likely to encounter facts of corruption.

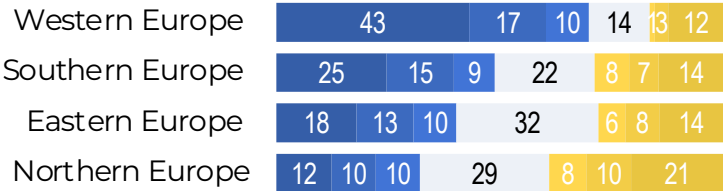


Comparison of Ukraine with the host country

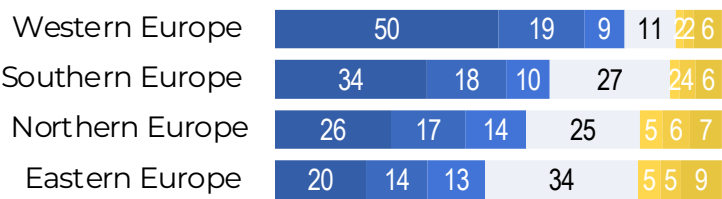
In your opinion, where is the higher level of...?

HIGHER in the host country HIGHER in Ukraine

Higher level of bureaucracy



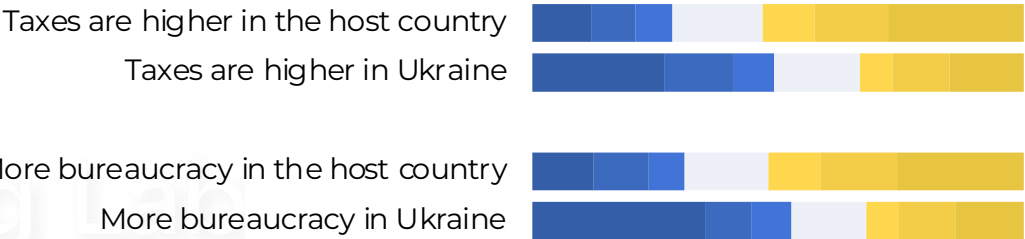
Higher level of taxation



Effect of restrictions on the assessment of the level of opportunity

Better in the host country Better in Ukraine

Better opportunity to do business



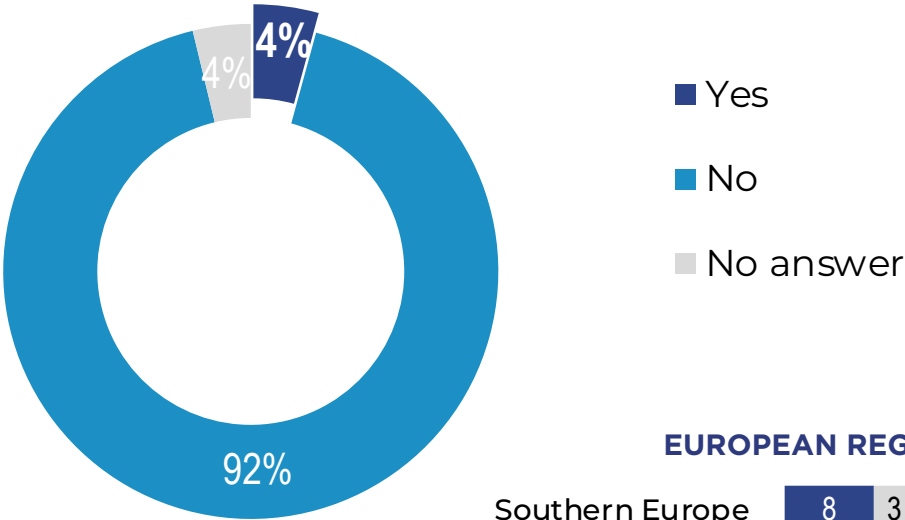
Better opportunity to succeed





Assessment of the level of corruption

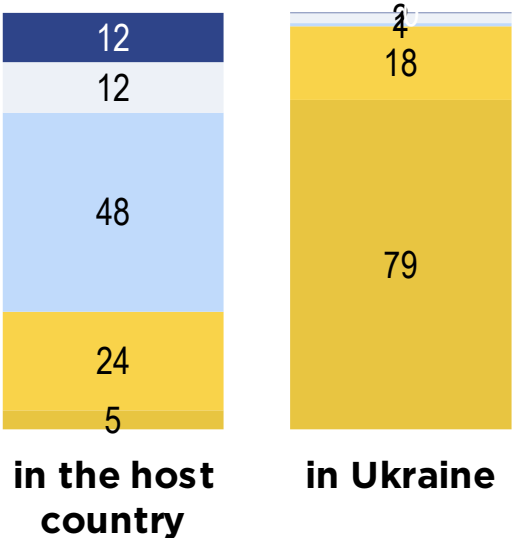
Have you personally had to give a gift to an official in your country of residence to solve a personal issue?



EUROPEAN REGIONS.			UKRAINIAN REGIONS.		
Southern Europe	8	3	West	7	2
Eastern Europe	5	4	Centre	5	3
Western Europe	3	4	South	4	4
Northern Europe	2	3	East	4	3
			Kyiv	2	5

How do you assess the level of corruption in...?

- High
- Medium
- Low
- No corruption
- No answer





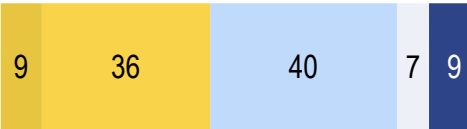
Assessment of the level of corruption

How do you assess the level of corruption in the host country?

■ High ■ Medium ■ Low ■ No answer ■ No corruption

PAID A BRIBE IN EUROPE

Have paid a bribe in this country



No



EUROPEAN REGIONS.

Southern Europe



Eastern Europe



Western Europe

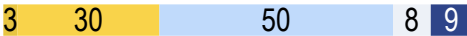


Northern Europe



DURATION OF STAY. EMPLOYMENT

A few years



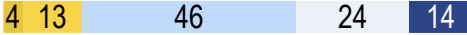
About a year



About half a year



A few months



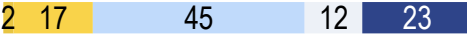
Working



Not working



Studying

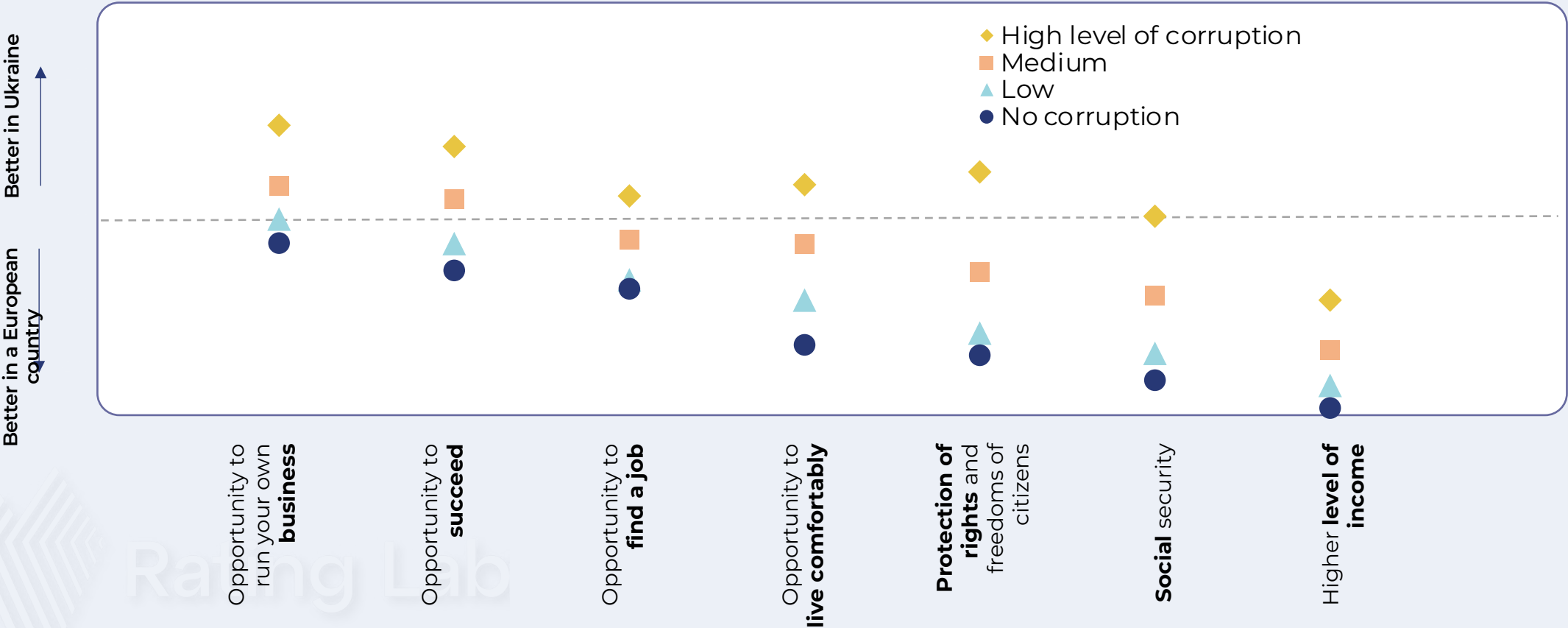




Comparison of OPPORTUNITIES

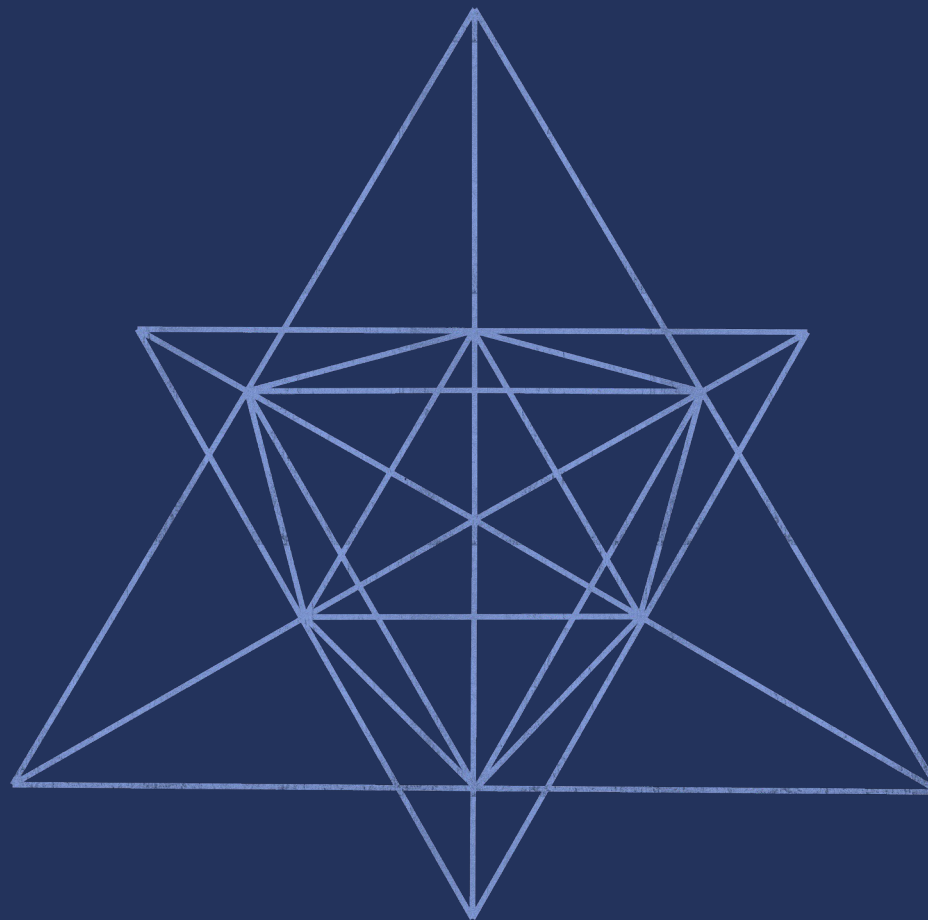
Level of corruption in the host country

In your opinion, where is the best level of such opportunities?



SECTION 4.

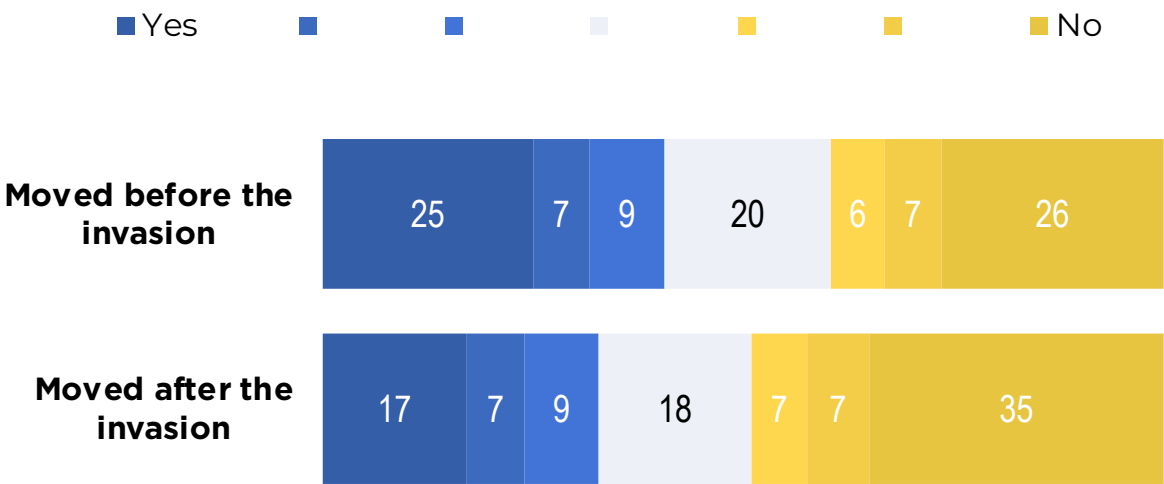
To stay or to return? Intentions and motivations of Ukrainians





The decision of whether to return or stay abroad

Would you like to stay permanently abroad?



49% of Ukrainians who moved after the invasion would not like to stay living abroad, even among Ukrainians who moved to Europe before the invasion (40%). Almost every fifth hesitates with the decision to return or to stay, the rest are thinking about staying permanently abroad. In fact, the possibility to stay depends not only on desires but also on other circumstances: opportunities, availability of work, residence permits, opportunities for children to study, and changes in personal circumstances. Therefore, it is impossible to say that exactly this number of our citizens will stay or return to Ukraine. Among the objectives of this study was to identify the factors that cause this.

Regression analysis showed that even though the respondents in the absolute majority assessed services in Ukraine at a significantly higher level than in Europe, other factors influence the decision to return or stay abroad more than anything else:

- 1) **Opportunity. First of all, it is about the opportunity to live comfortably and achieve success.** Somewhat less: opportunities to run your own business and find a job.
- 2) **Education and availability of housing.** Although this factor is less strong, it is still significant.

Levels of infrastructure, social security and protection of rights and freedoms have insignificant influence. But the high level of bureaucracy and taxation in Europe has much less influence on these decisions, as well as the high level of corruption in Ukraine.



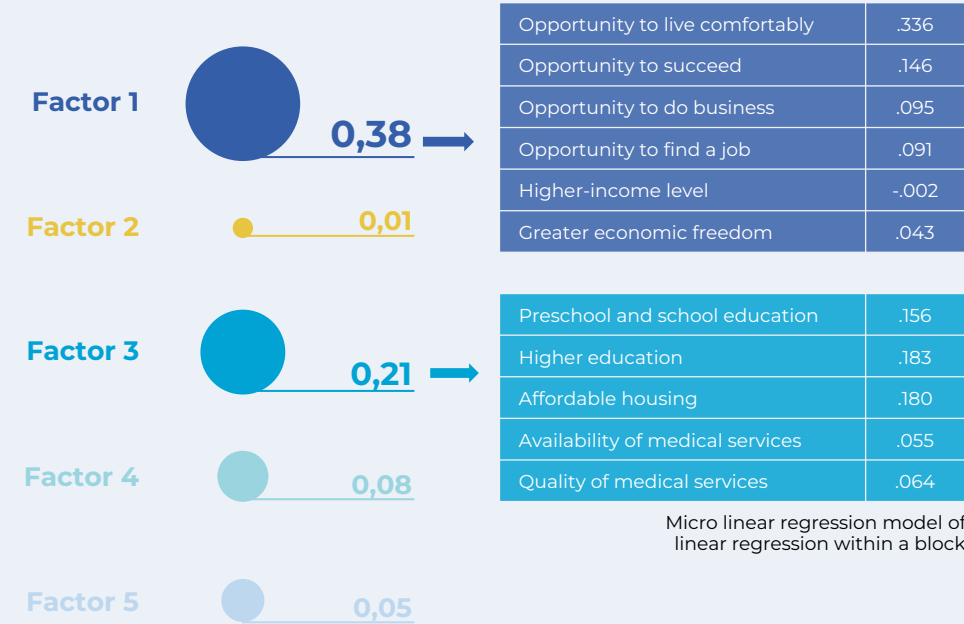
The decision to return or stay abroad

Factors

A decision of 5 factors explains 56% of the variance, the returned component matrix is shown

	Factor 1	Factor 2	Factor 3	Factor 4	Factor 5
Opportunity to succeed	0,75				
Opportunity to run your own business	0,68				
Opportunity to find a job	0,67				
Greater economic freedom	0,62				
Opportunity to live comfortably	0,60			0,35	
Higher-income level	0,49			0,47	
Online shopping		0,76			
Cafes and restaurants		0,71			
Postal services, deliveries		0,70			
Retail chains, shops		0,69			
Beauty industry		0,67			
Financial and banking services		0,66			-0,30
Online government services		0,59			-0,37
Quality of medical services		0,33	0,72		
Accessibility of health services		0,34	0,72		
Preschool and school education			0,69		
Higher education			0,65		
Housing affordability	0,35		0,38		
Roads				0,65	
Public transport				0,55	
Social security	0,44		0,36	0,52	
Protection of rights and freedoms of citizens	0,46		0,37	0,51	
Higher level of bureaucracy					0,77
Higher rate of taxation					0,75
Higher level of corruption				-0,70	

Factors that most influence the decision to stay or return



Determined by the linear regression model, standardised Beta coefficients are given, the larger the index - the greater the strength of the influence of the factor on the dependent variable of the probability of non-return. The model explains 42% of the variation of the non-return variable.

The decision to return or stay abroad

The desire to stay or return is also related to several circumstances (listed in order of the most significant according to the results of regression analysis):

- **Income:** for low-income people Ukraine is more attractive, for the well-off more attractive is already Europe. Improvement in income level after moving also significantly impacts the desire to stay in the host country.
- **Belief in victory:** those who do not believe in victory want to stay; those who believe that victory will be in a few months want to go home the most. The longer the war lasts, the less desire to return.
- **Language proficiency:** those who have a high level of language mostly tend to stay abroad. Language is both an adaptation and an opportunity to work, have an income, communicate and study. Its absence and the need to learn it (and not everyone can learn a language, especially at an older age) is a significant obstacle because to live without a language is to be socially isolated and have a low social status and unskilled work.
- **Local attitudes, cases of discrimination:** cases of discrimination against Ukrainians do not favour the desire to stay. Local attitudes also determine the dynamics: a warm attitude favours the desire to stay, while a cold attitude does not. The factor of corruption also influences those who have paid bribes or believe that there is corruption in the country to be more willing to return. In general, the better the living conditions in the country, the less desire to return.

- **Gender, age, presence and age of children:** men are significantly more oriented to stay than women. Age differences are non-linear, but both middle-aged women and men are less oriented to return to Ukraine than the youngest (16-24) and the oldest (45-55+). Older women want to return home the most: it is probably more difficult for them to adapt, find a job, learn the language, and expand their social circle. The age of children does not fundamentally affect the desire to return, Ukrainians with school-age children are only slightly more likely to think about staying.
- **Employment:** those who do not work or work in Ukraine have the desire to return to Ukraine most of all. Those who found a job in Europe are more hesitant.
- **Frequency of visits to Ukraine, region of Ukraine, duration of residence:** among those who have never travelled to Ukraine since moving there are the least number of those who want to return. This refers primarily to Ukrainians who left the East and South of the country. The frequency of travelling within the host country or Europe is conversely related to the desire to return: those who travel frequently are more likely to want to return. Perhaps those who want to return perceive living abroad now as an opportunity to see the country while they are here - a combination of residence and tourism (time to see the country).
- **Duration of stay affects linearly:** the longer a person lives abroad, the less they want to return to Ukraine.
- **Region of Europe:** in Western and Southern Europe there are slightly more people who want to stay, it is difficult to say why, because if we take the economic and social level - it could be Western and Northern Europe, but if we take the climate and favourable living conditions, it is probably Southern Europe.

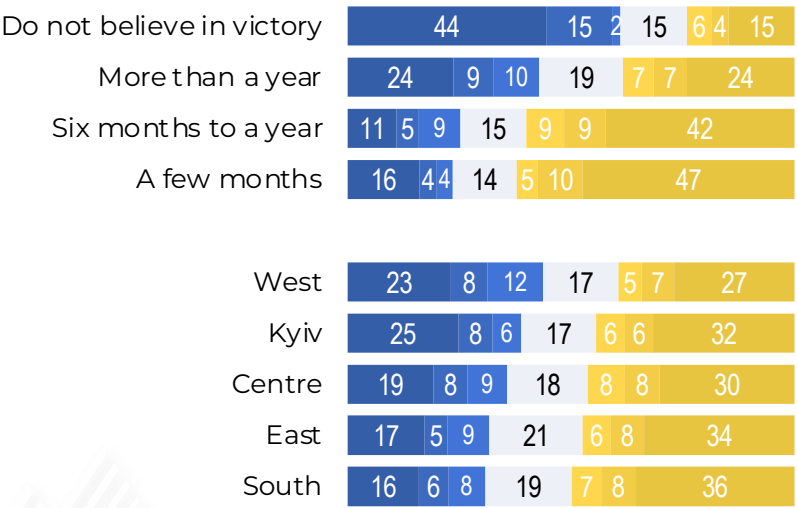


The decision to return or stay abroad

Would you like to stay permanently abroad?

■ Yes ■ No

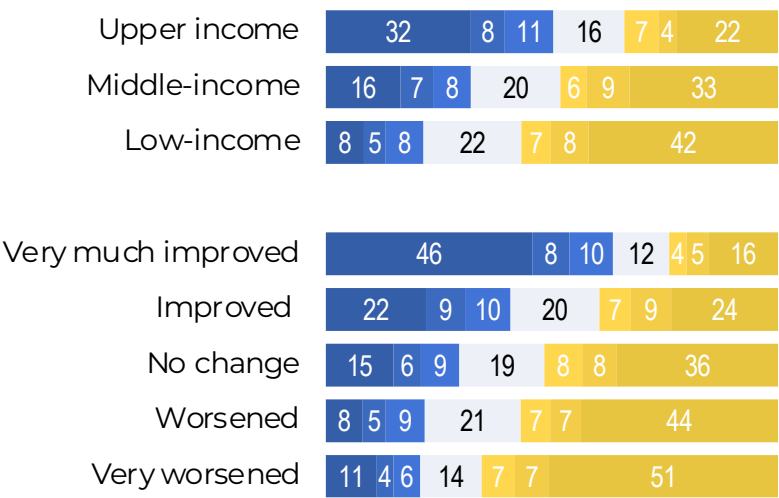
Expecting the victory. Regions in Ukraine



Employment



Income. Change in income for the year

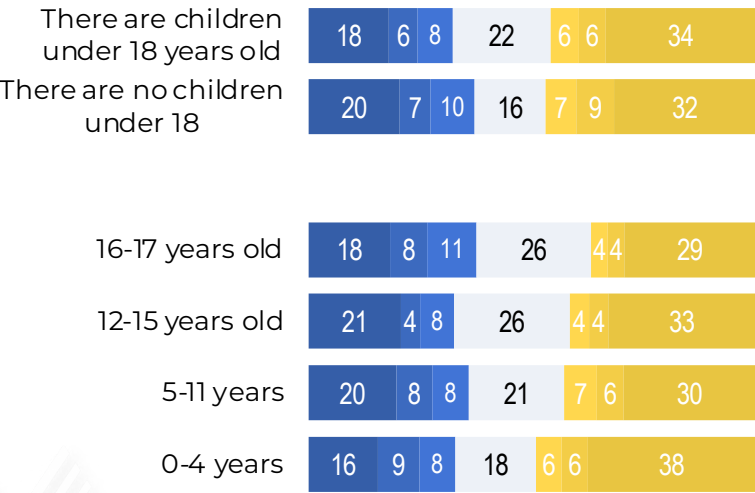




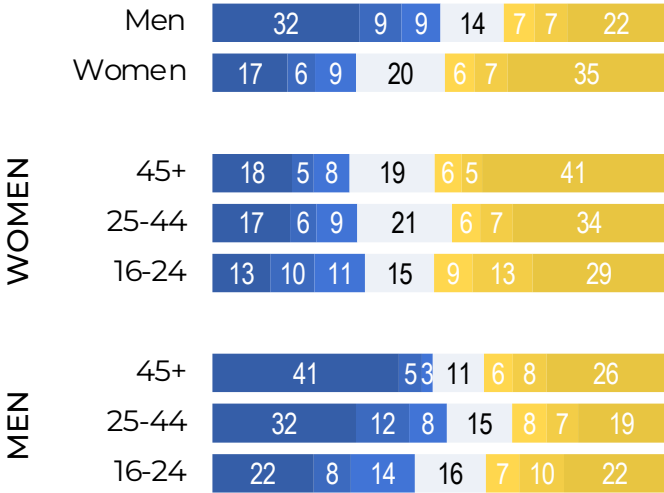
The decision to return or stay abroad

Would you like to stay permanently abroad? Yes No

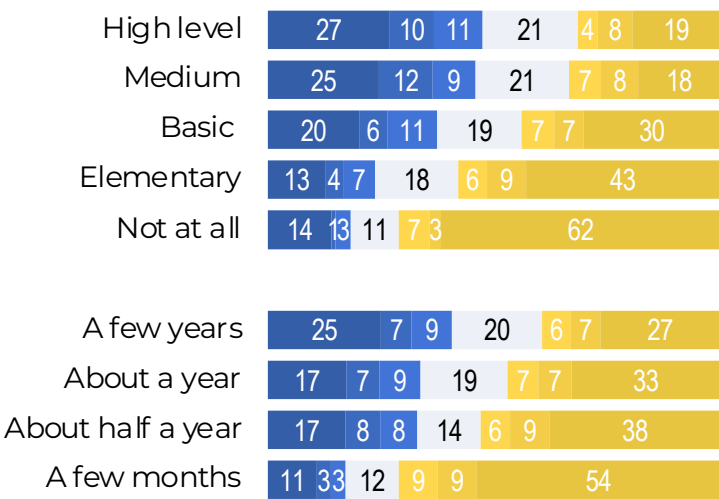
Presence and age of children



Gender. Age



Language level. Length of stay

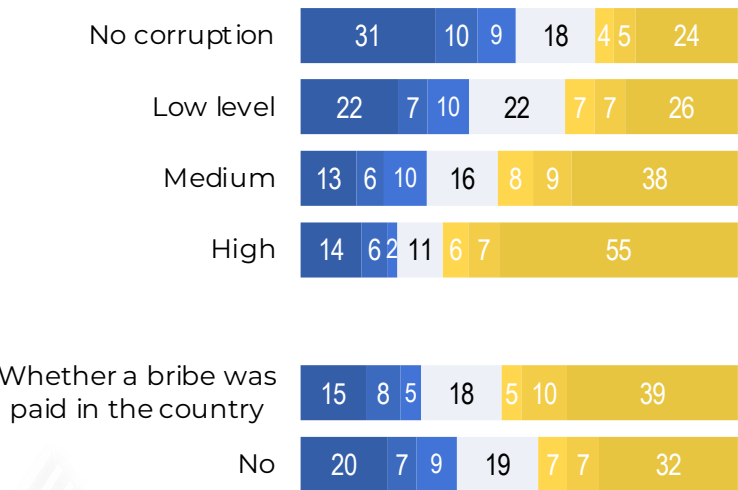




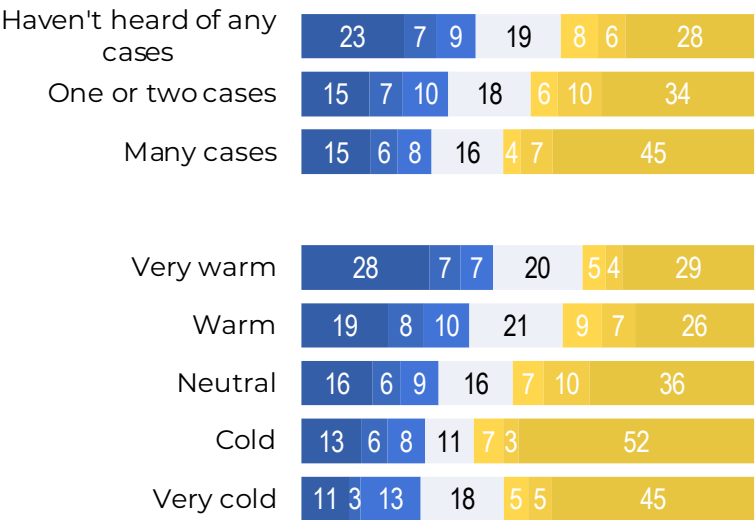
The decision to return or stay abroad

Would you like to stay permanently abroad? Yes No

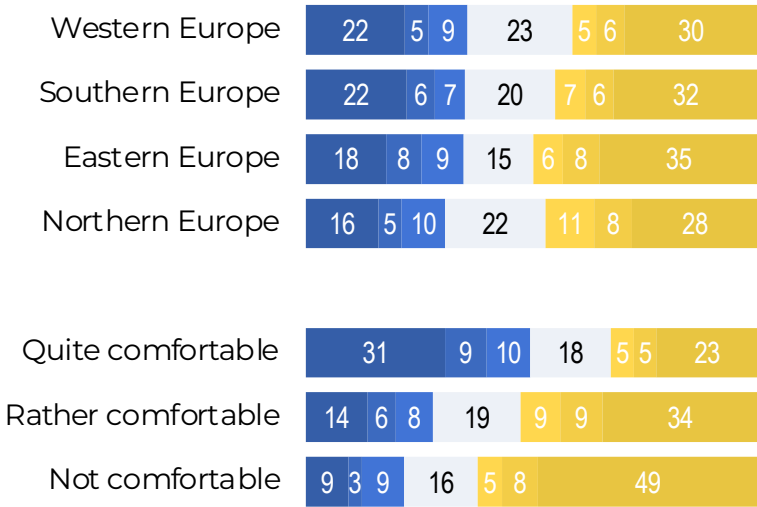
Corruption in the host country



Know about cases when Ukrainian refugees were refused employment.
The attitude of locals towards Ukrainians

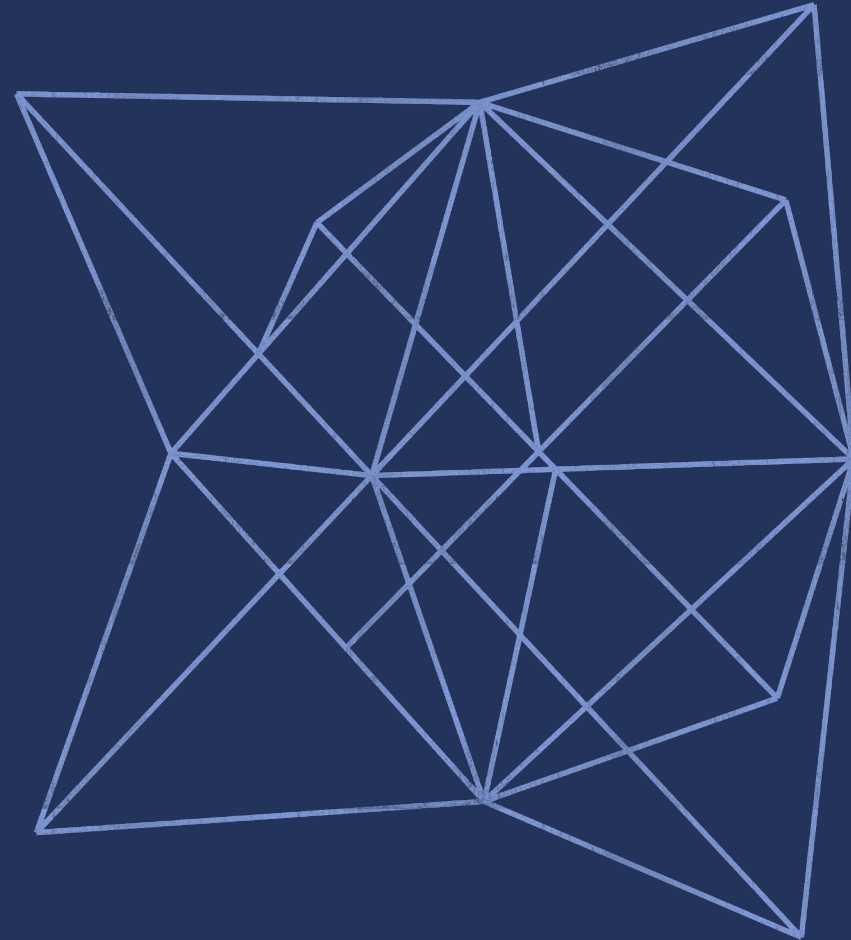


Regions of Europe.
Living conditions



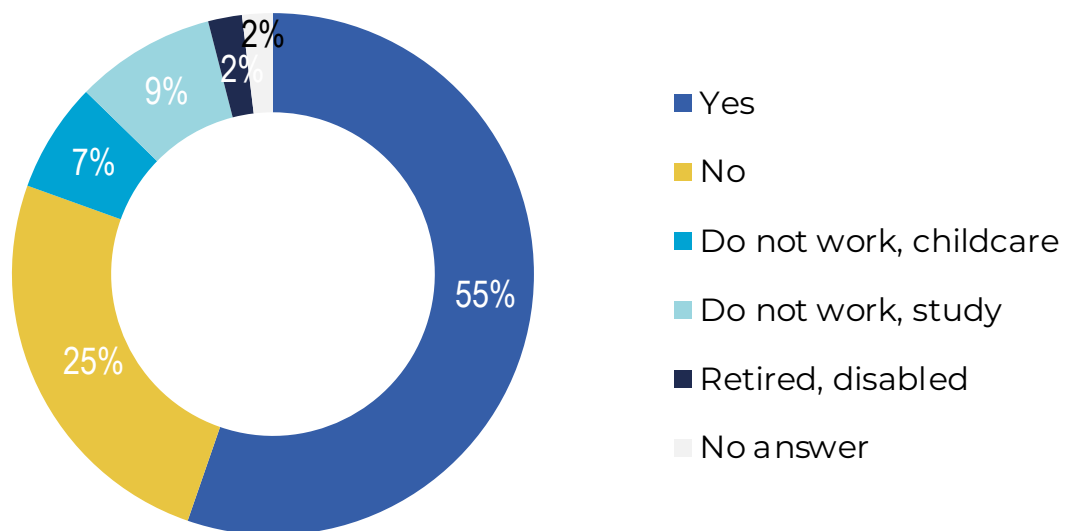
SECTION 5.

Employment. Employment problems



Employment

Do you currently have a job?



49% of the Ukrainian refugees surveyed are employed in Europe. Among those who arrived before the invasion - such 74%.

The most employed Ukrainians are in Eastern Europe (67%), and the least in Western Europe (35%). Ukrainians who came from the South and East of the country and Kyiv are the least employed. The majority of those who speak very well the local language are employed.

Among those who are employed, more than 80% have a job in the host country, 14% - in Ukraine or several countries at once.

The employment rate among men is almost 1.5 times higher than among women. Similarly, employment is higher among respondents who do not have children than among those who do (14% are not working because of childcare). A quarter of respondents aged 16-24 are not working because of study.

Among those who are not employed, a quarter is actively looking for work, a further 39% are thinking about it, while a third are not looking for work. Ukrainians who are in Western Europe are the least engaged in the job search. Women are less engaged in job search than men, especially in middle age.

At the same time, **Ukrainians who are actively learning the local language, have relatively low incomes, have arrived relatively recently and are looking for options to stay in the host country for longer are looking for work.**

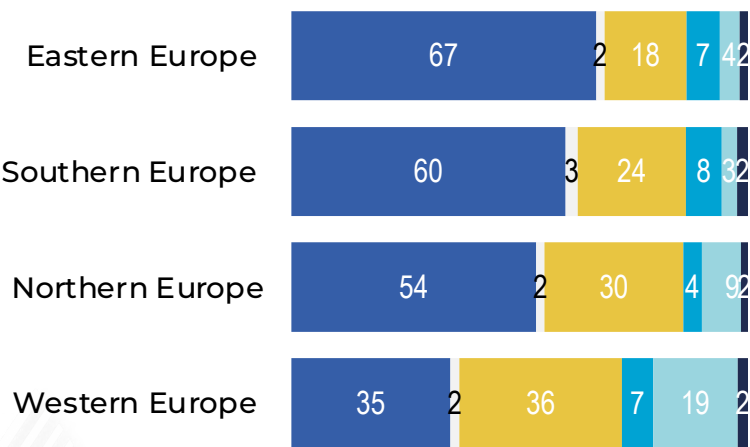


Employment

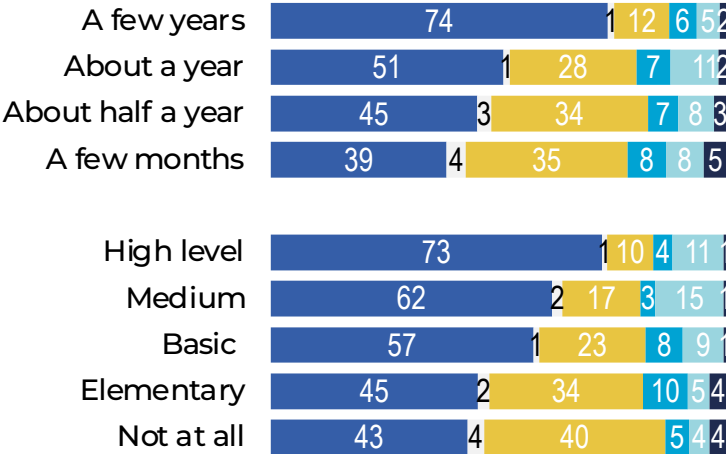
Do you currently have a job?

■ Yes ■ No answer ■ No ■ Do not work, childcare ■ Do not work, study ■ Retired, disabled

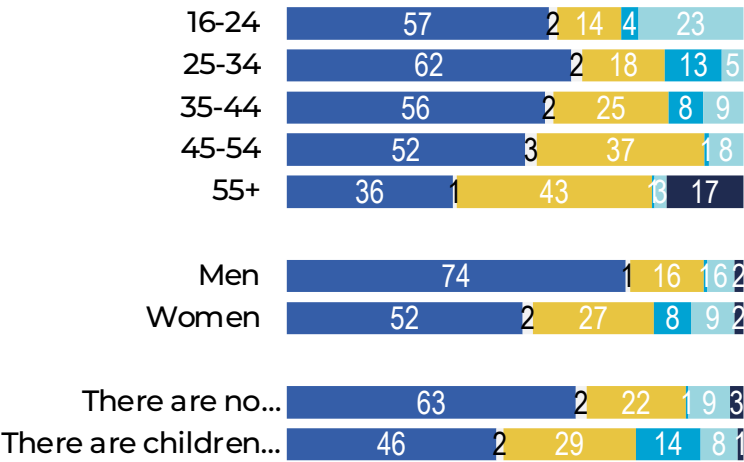
EUROPEAN REGIONS.



DURATION OF STAY. LANGUAGE KNOWLEDGE



AGE. GENDER. PRESENCE OF CHILDREN.

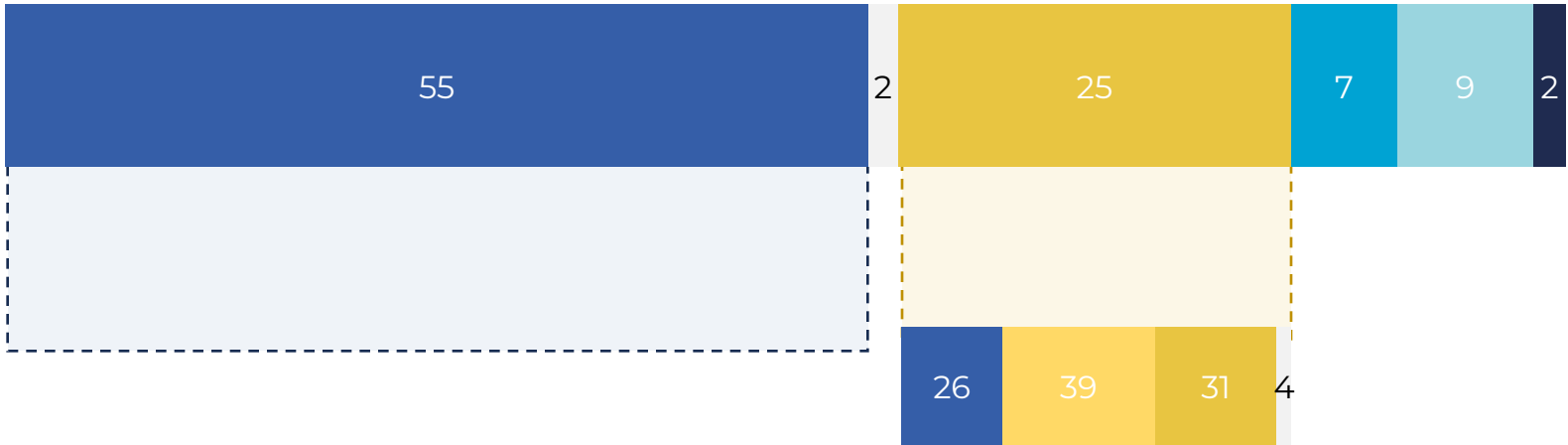




Employment

Do you currently have a job?

■ Yes ■ No answer ■ No ■ Do not work, childcare ■ Do not work, study ■ Retired, disabled



Where do you have a job?

Among those who are employed, N=1119

■ In the country of residence
■ In Ukraine
■ I have jobs in several countries
■ Other

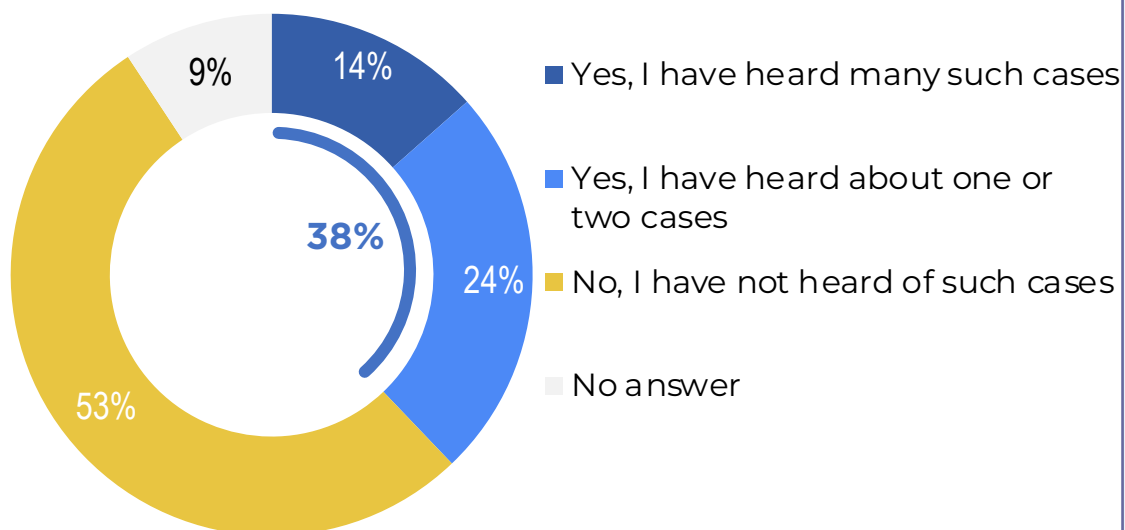
Are you looking for a job now?

Among those who are not working, N=500

■ Yes, actively
■ Yes, thinking about it
■ No
■ No answer

Denial of employment to Ukrainians

Have you heard of cases in your country of residence when Ukrainian refugees were refused employment?



Almost 40% of Ukrainians surveyed in Europe have heard of cases of Ukrainian refugees being denied employment, with 14% having heard of many examples and another 24% having heard of isolated cases. Among those who are actively looking for a job now, 57% of the respondents had heard of such cases.

More often cases of Ukrainian refugees being denied employment are reported by respondents who are in Eastern Europe. This opinion is especially popular among Ukrainian youth who have relatively recently arrived in Europe.

The most common problems of Ukrainian employment in Europe are language barrier (73%), unskilled work (29%), low-paid work (19%), and non-recognition of Ukrainian education diploma (14%). Respondents who are now in active job search add to this the reluctance of employers to hire Ukrainians. Respondents who continue to work in Ukraine often mention the latter factor. Also, those who work in Ukraine see unskilled work as a problem more than others, and perhaps that is why they do not want to change their Ukrainian job for it.

If the language barrier was relatively more often mentioned by respondents in Western Europe, then low-paid work and reluctance to hire Ukrainians – in Eastern Europe.

The fact that the work is far from home was more often mentioned by respondents in Northern Europe, as the non-recognition of Ukrainian diplomas – in Southern Europe.



Denial of employment to Ukrainians

Have you heard of cases in your country of residence when Ukrainian refugees were refused employment?

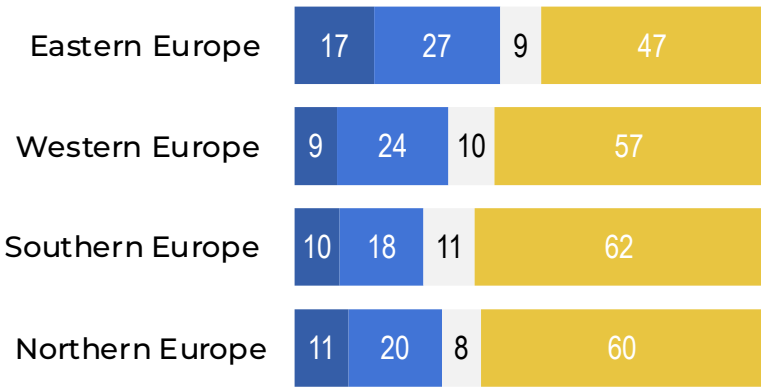
- Yes, I have heard many such cases

■ Yes, I have heard about one or two cases

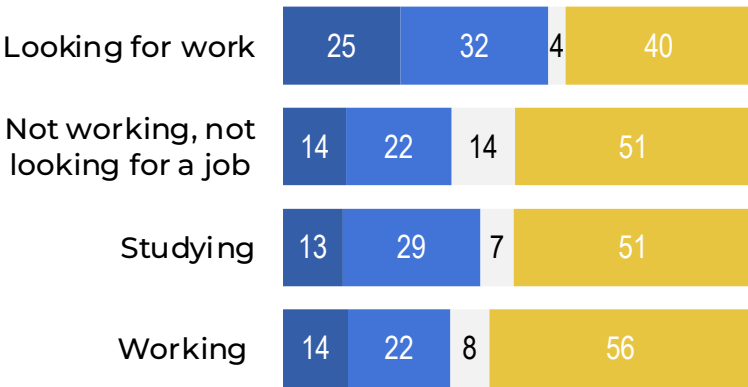
■ No answer

■ No, I have not heard of such cases

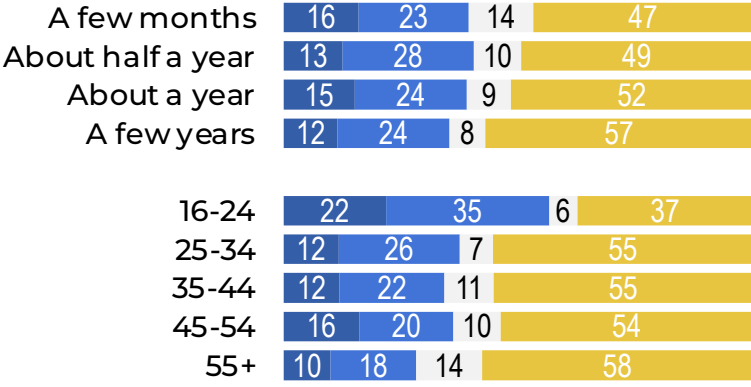
EUROPEAN REGIONS.



EMPLOYMENT



DURATION OF RESIDENCE. AGE



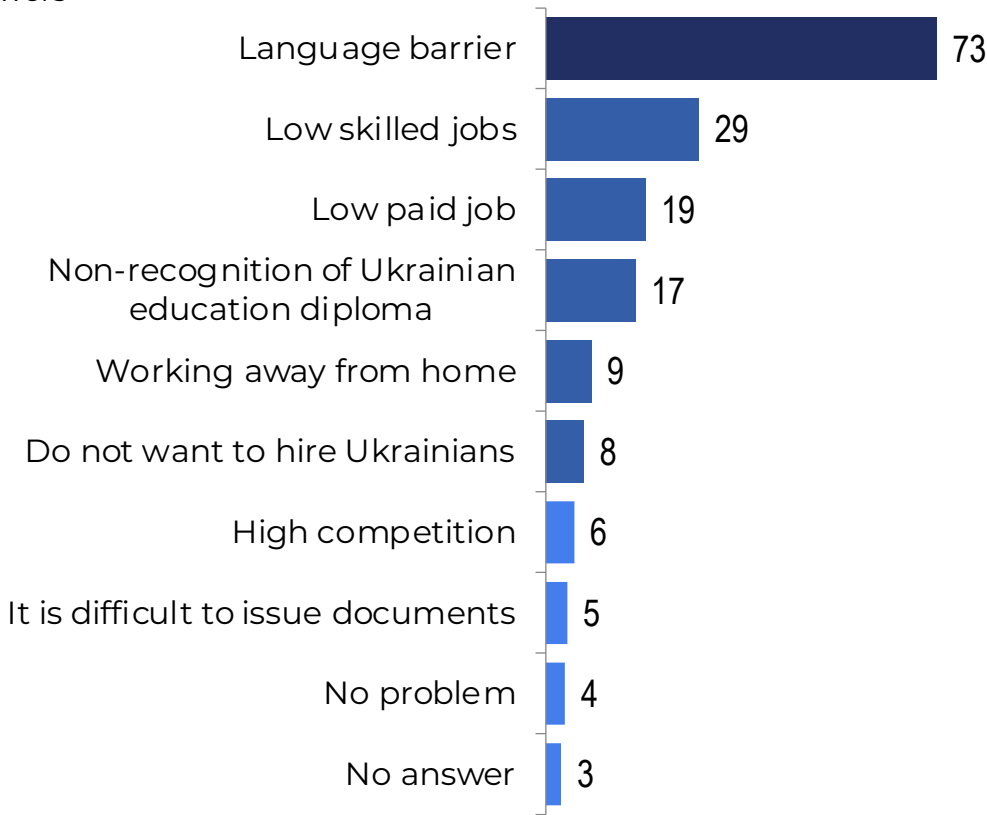


Barriers to employment

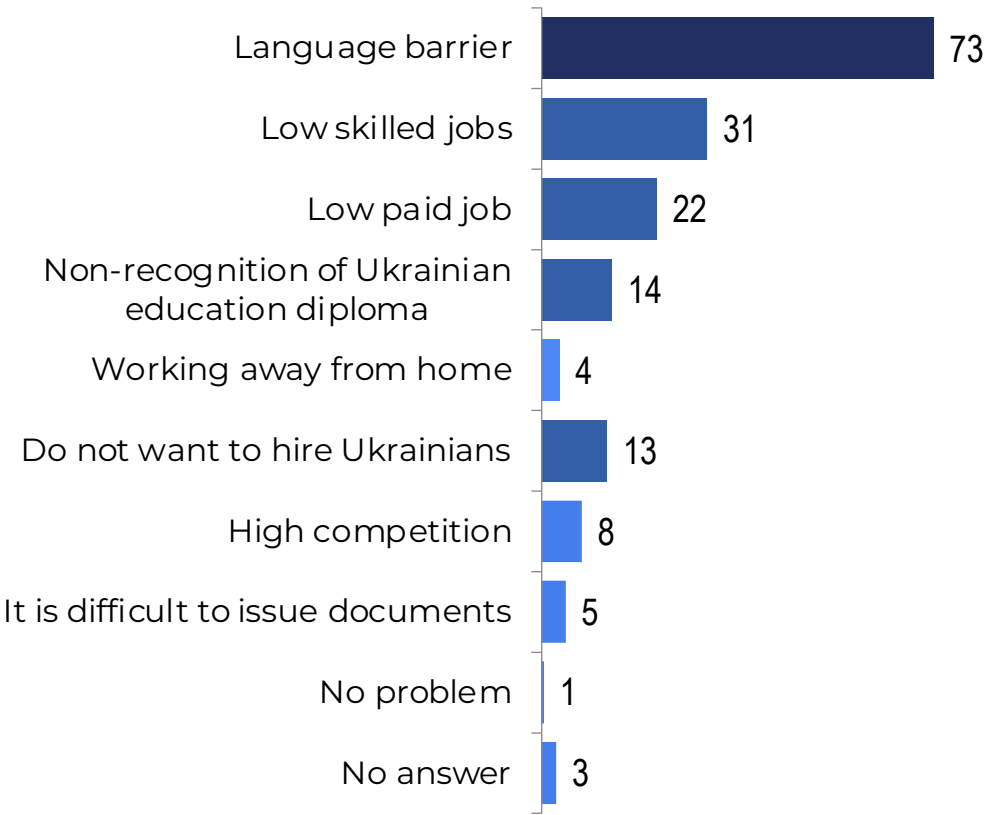
What possible problems could Ukrainians face when looking for a job in the host country?

2 answers

AMONG ALL



AMONG THOSE WHO ARE LOOKING FOR A JOB

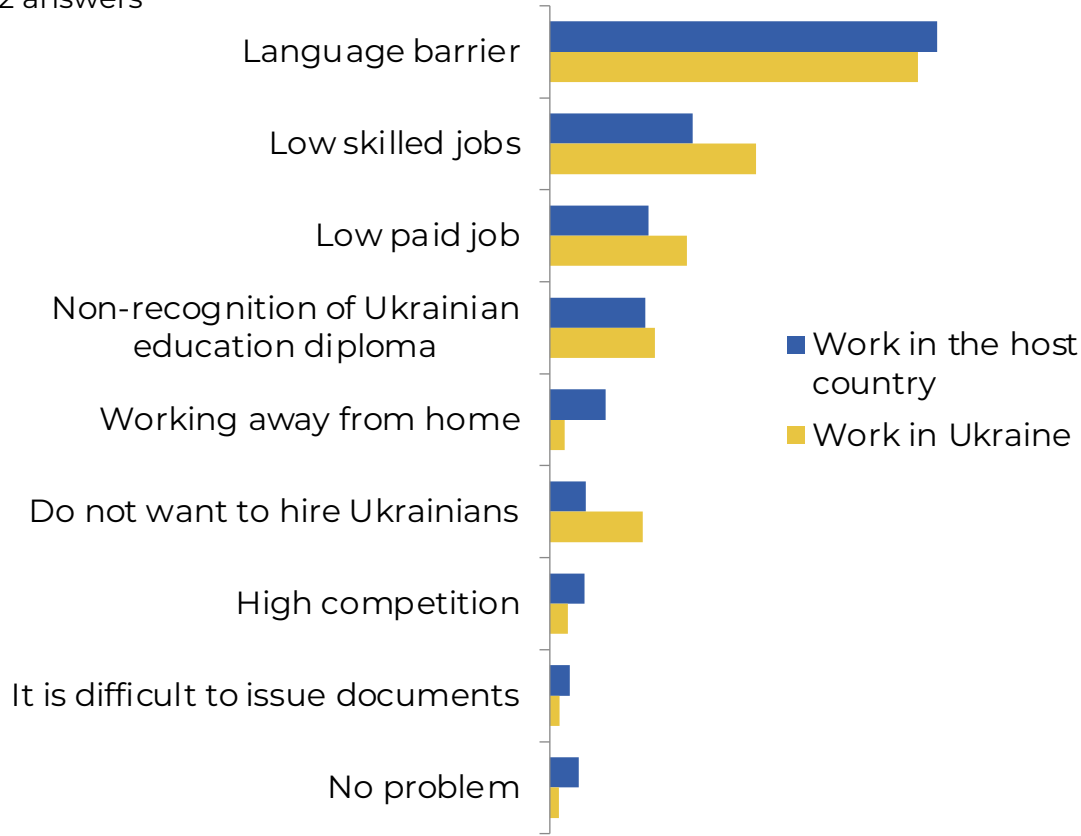




Barriers to employment

What possible problems could Ukrainians face when looking for a job in the host country?

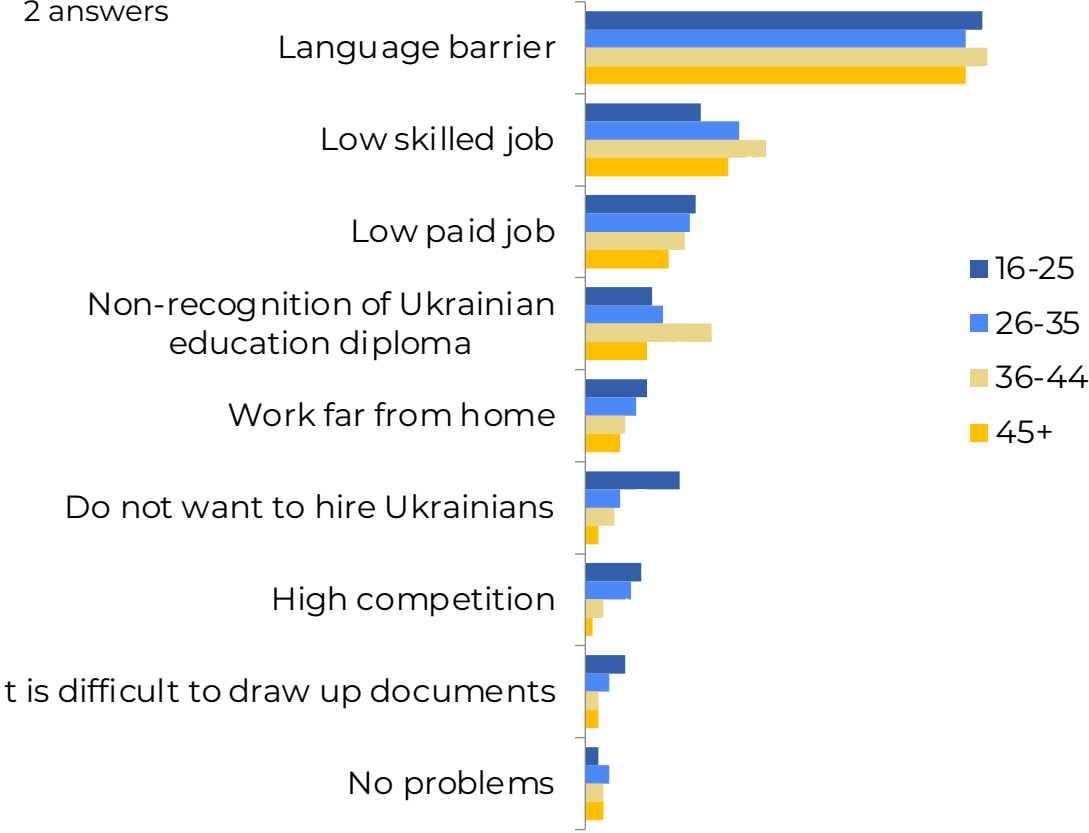
2 answers



Barriers to employment

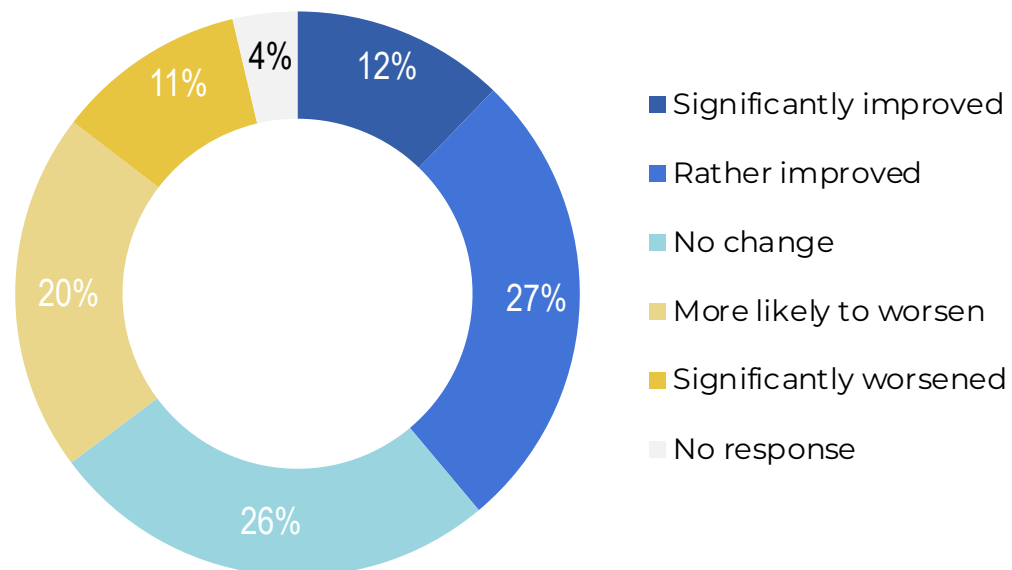
What possible problems could Ukrainians face when looking for a job in the host country?

2 answers



Change in the financial situation

How has your financial situation changed over the past year?



Almost 40% of Ukrainians surveyed have improved their financial situation over the past year, a quarter of them have not changed and a third of them have deteriorated. These are almost half of the Ukrainians who left before the invasion.

The longer Ukrainians stay in Europe, the better they have the dynamics of changes in their financial situation over the last year.

There is a direct correlation: most of those who have a job in the host country have improved their financial situation, while the opposite is true for those who do not work or who continue to work in Ukraine.

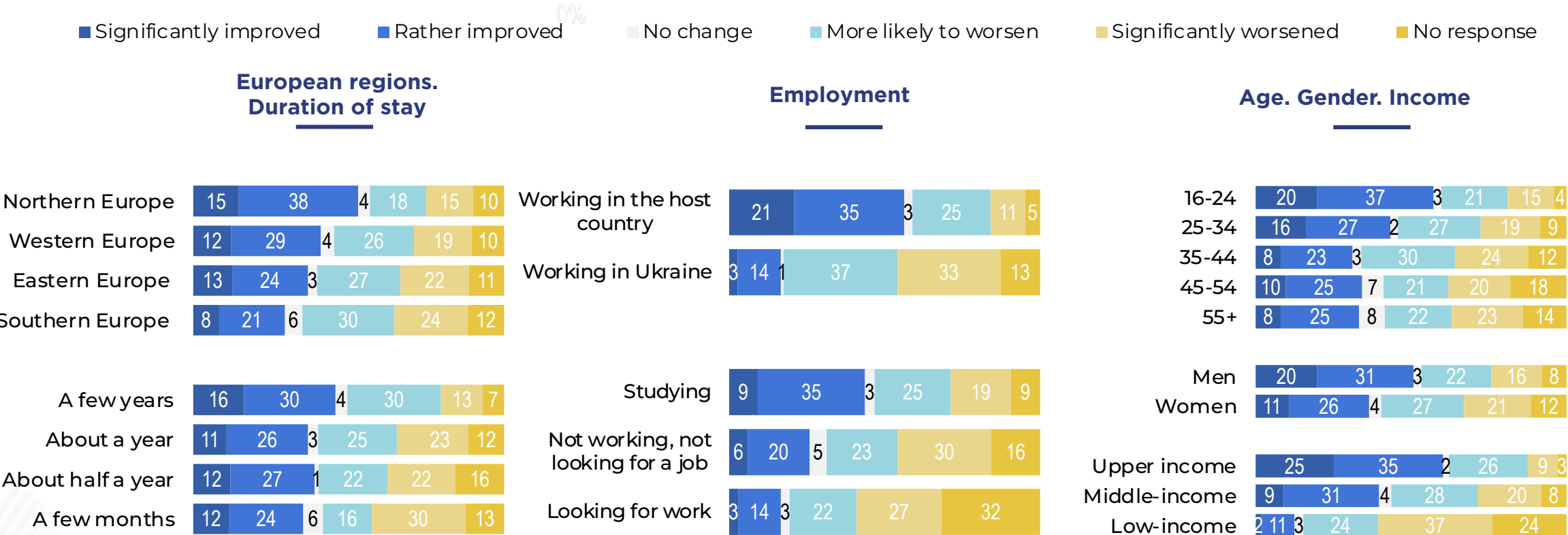
It is important that the majority of students also improved their financial situation. Whereas deterioration occurred among middle-aged and older people, more often among women.

Most Ukrainians who improved their financial situation over the last year are in Northern and Western Europe.



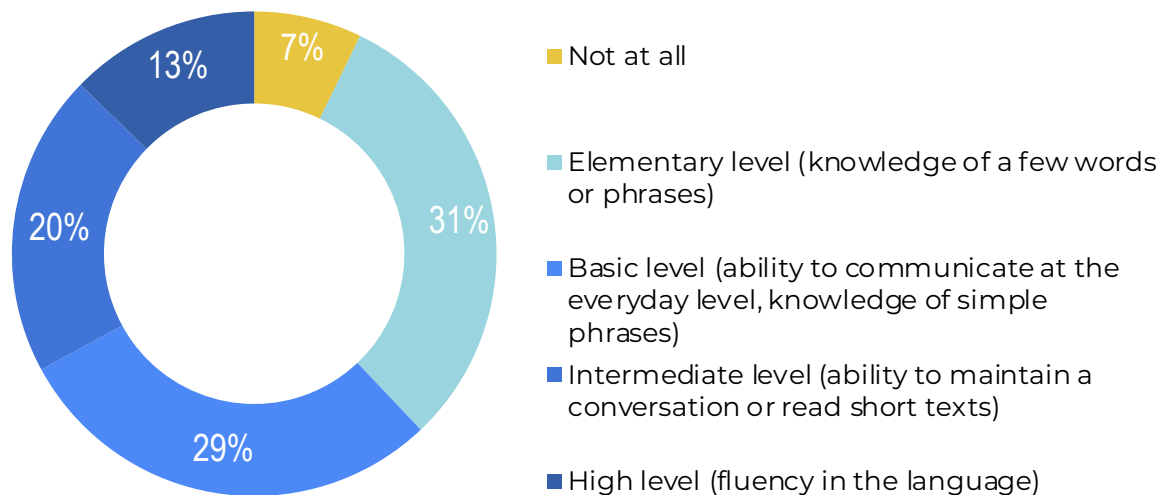
Change in the financial situation

How has your financial situation changed over the past year?



Language knowledge

How would you rate your level of knowledge of the language of the country, you are in?



Only **13% of Ukrainians surveyed in Europe speak the language of the country of residence at a high level**, and another 20% - at an average level, which allows them to maintain a conversation or read short texts. 29% have a basic level, which allows them to communicate on a household level and assume knowledge of simple phrases. The rest have an elementary level or do not know the language at all.

The best level of language proficiency is among Ukrainians in Southern and Eastern Europe, the worst – in Northern Europe.

The longer Ukrainians stay in Europe, the higher the level of proficiency in the local language they demonstrate. In fact, among Ukrainians who have been here for more than a few years, 58% have a high or average level, while among those who have been here for a few months - only 7%.

These skills are given worst of all to older people. Young people show much more progress.

Almost 40% of Ukrainians attend language courses in the country of stay, and another 20% plan to do so. Most often language courses are attended by Ukrainians who are in Western (61%) and Northern (55%) Europe, least often - in Eastern Europe (24%). The most frequent language learners are students or those who are looking for a job.

Language courses are more often attended by people of middle and pre-retirement age.

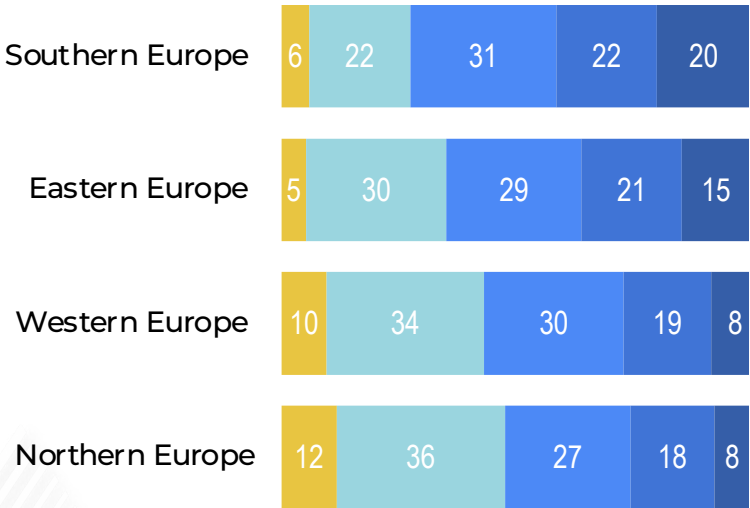


Knowledge of the language

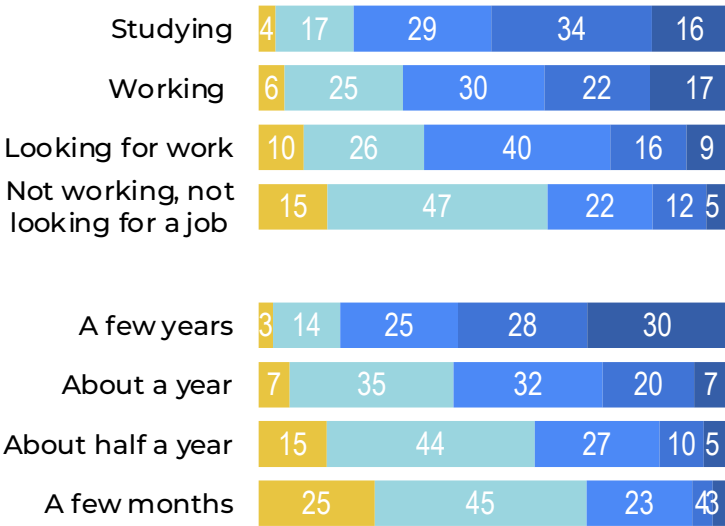
How would you rate your level of knowledge of the language of the country where you are?

Not at all Elementary level Basic level Intermediate level High level

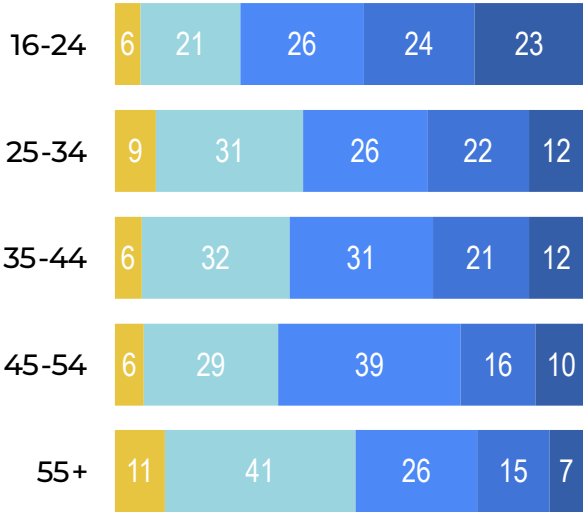
EUROPEAN REGIONS.



EMPLOYMENT.
DURATION OF STAY



AGE

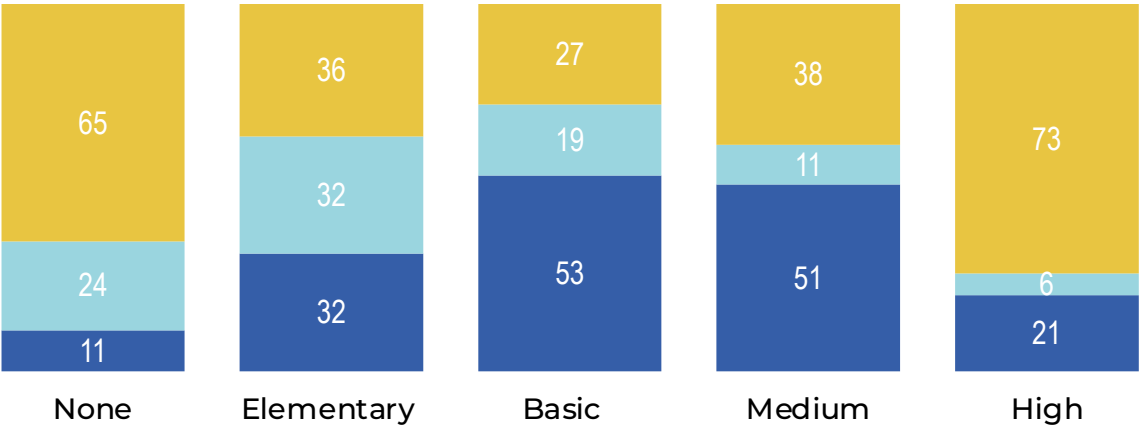
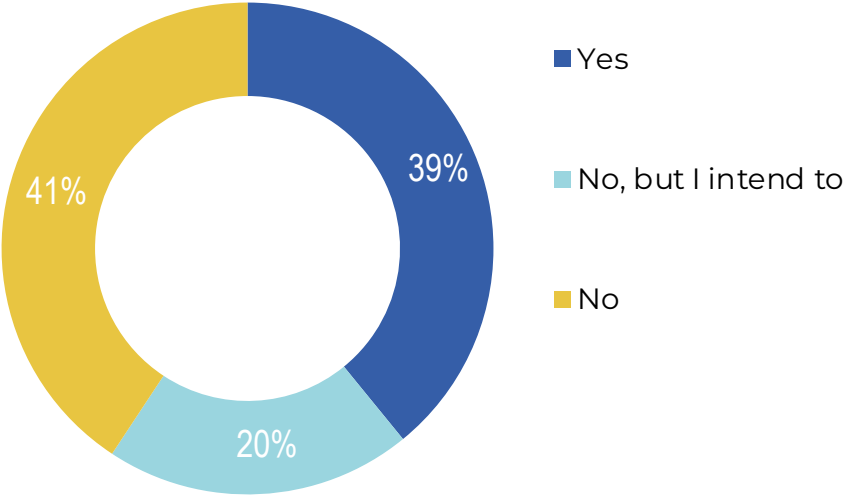




Learning the local language

Do you attend courses to learn the local language?

LANGUAGE LEVEL



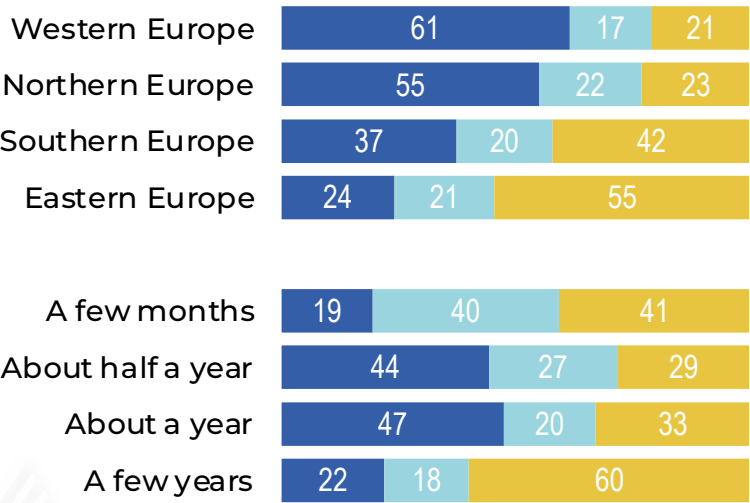


Learning the local language

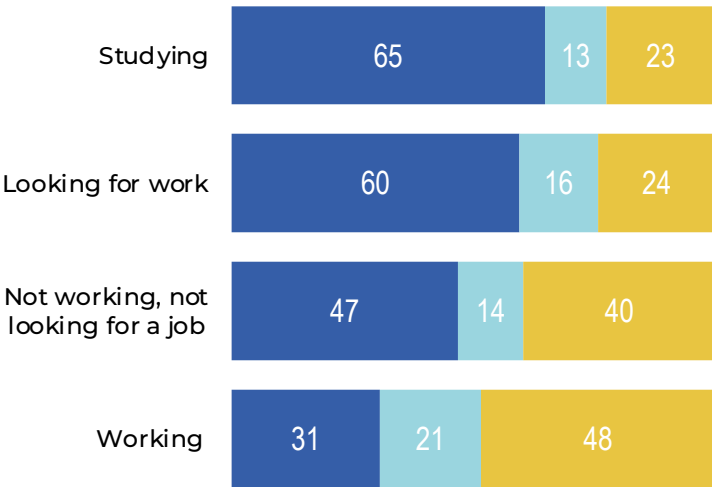
Do you attend courses to learn the local language?

■ Yes ■ No, but I intend to ■ No

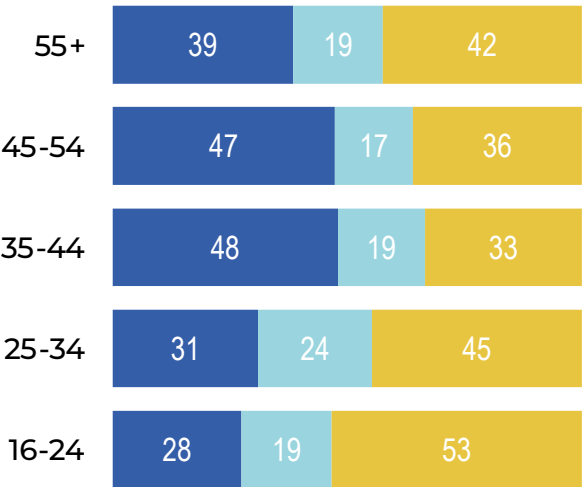
EUROPEAN REGIONS.
DURATION OF STAY



EMPLOYMENT



AGE



SECTION 6.

Evaluation of European countries' support for Ukraine

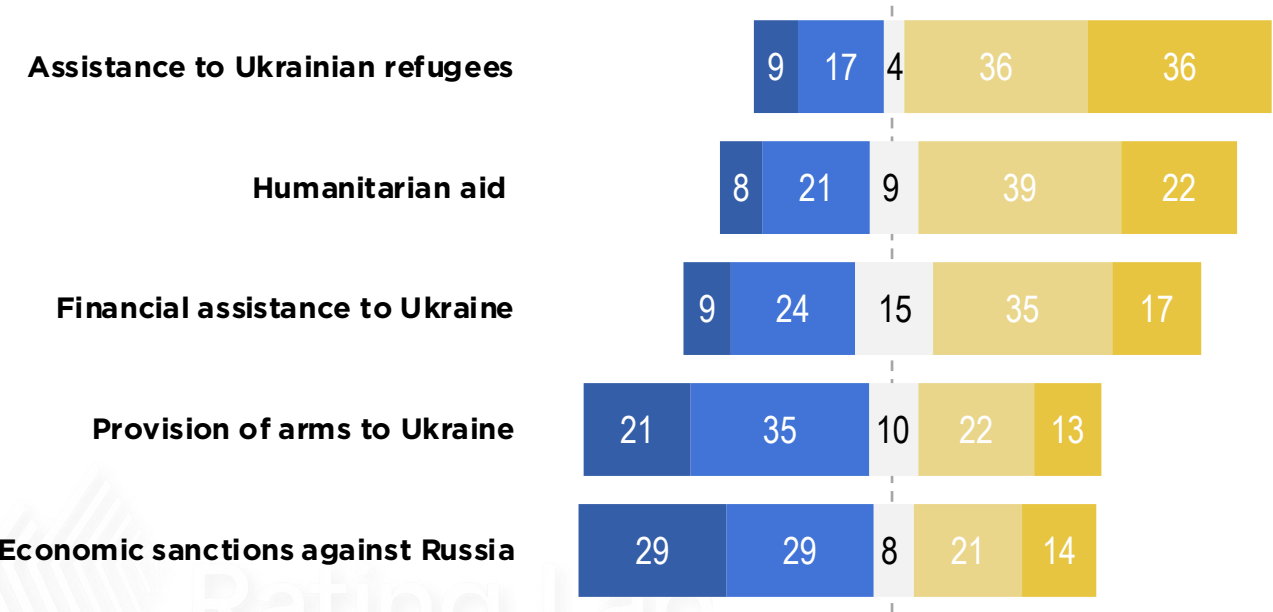




Evaluation of Western aid

When it comes to supporting Ukraine, are the following actions by the country where you are located sufficient?

- Quite enough
- Rather enough
- No answer
- Rather not enough
- Not at all sufficient



The absolute majority of Ukrainians in Europe (72%) believe that **Ukrainian refugees are provided with enough assistance**. In particular, 84% of Ukrainians surveyed in Western and Northern Europe, 65% in Eastern Europe and 47% in Southern Europe think so.

Most respondents (61%) **consider humanitarian aid to Ukraine sufficient**, including 76% of those polled located in Northern Europe, 63% in Eastern Europe, 60% in Western Europe and 50% in Southern Europe.

A relative majority of respondents (52%) consider **financial assistance sufficient**, including 66% of interviewed people in Northern Europe, 53% in Eastern Europe, 52% in Western Europe and only 34% in Southern Europe.

At the same time, more than half of respondents (56%) are dissatisfied with the provision of arms to Ukraine, including 35% of respondents in Northern Europe, 48% in Eastern Europe, 69% in Western Europe and 72% in Southern Europe.

Similarly, the majority of respondents (58%) consider economic sanctions against Russia insufficient, including 39% of respondents in Northern Europe, 51% in Eastern Europe, 68% in Western Europe and 70% in Southern Europe.

Thus, while Ukrainians are satisfied with the level of support for refugees in the host country, they **are dissatisfied with the amount of arms for Ukraine and economic sanctions against Russia**. For the latter questions, the best scores were given to the countries of Northern Europe, while the worst scores were given to Western and Southern Europe.



Evaluation of Western Aid

Europe Region

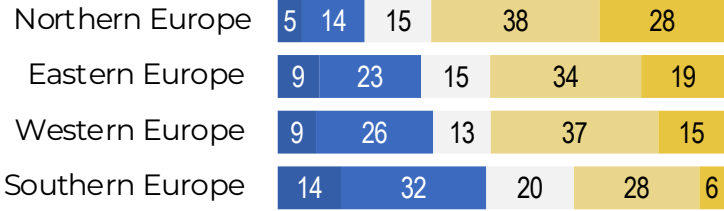
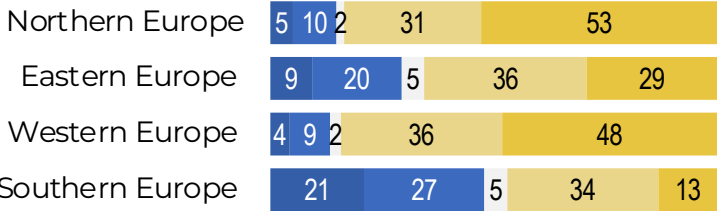
When it comes to supporting Ukraine, are the following actions by the country where you are located sufficiently?

■ Not at all sufficient ■ Rather not enough ■ No answer ■ Rather enough ■ Quite enough

Assistance to Ukrainian refugees

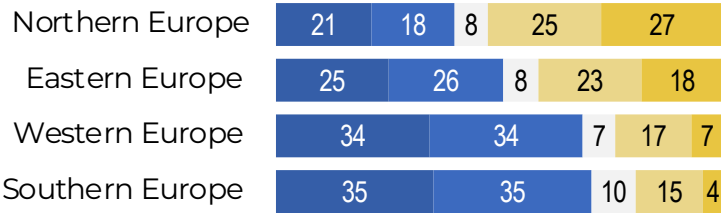
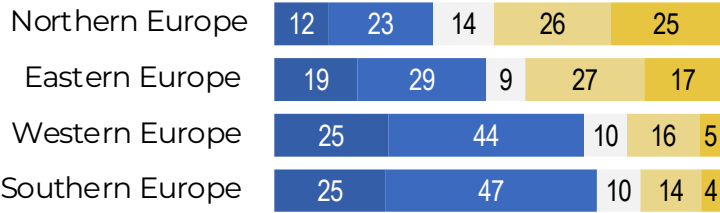
Humanitarian aid

Financial assistance to Ukraine



Provision of arms to Ukraine

Economic sanctions against Russia



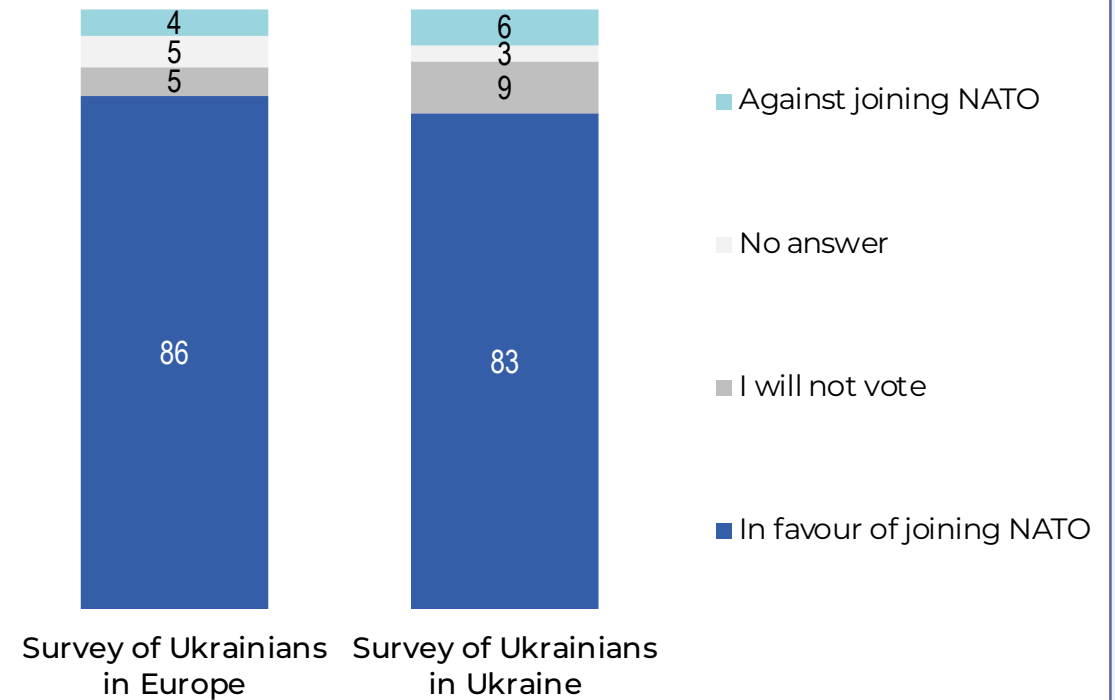
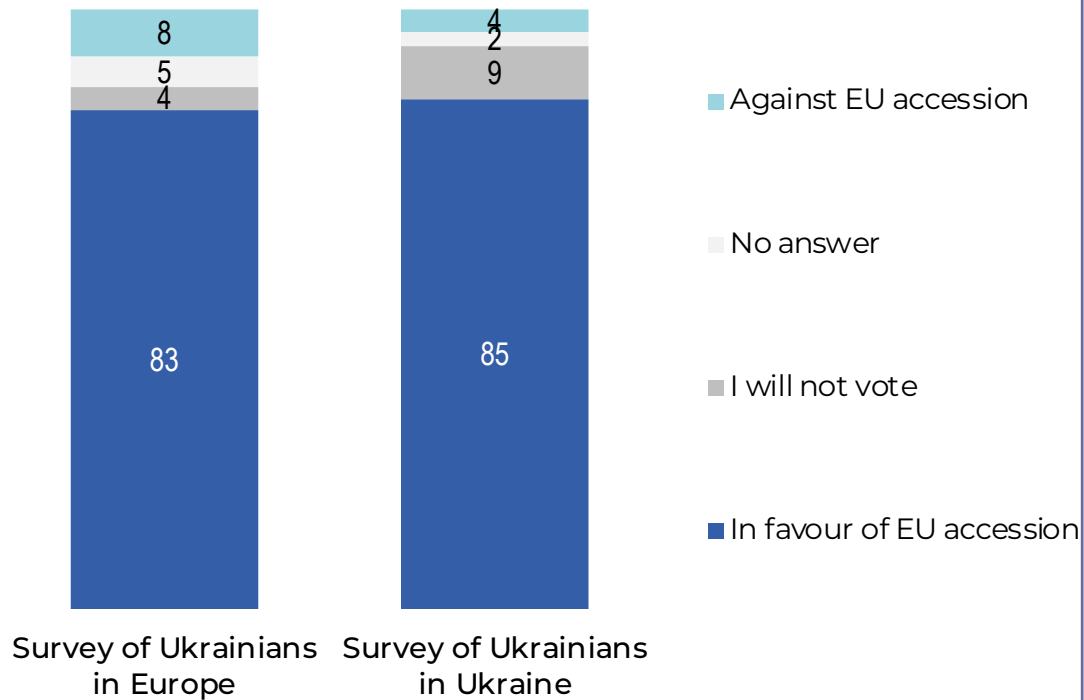
SECTION 7

European integration sentiment and expectations of the duration of the war



Support for European integration

If a referendum on Ukraine's accession to how would you vote?





Waiting for victory

How much time do you think Ukraine needs to win a war with Russia?



The results of polls in Ukraine and in Europe show certain differences in assessments – **Ukrainians in Europe are more cautious in forecasting the duration of the war.**

Thus, among Ukrainians in Ukraine, 32% believe that Ukraine needs six months to a year to win, 30% believe that it needs more than a year, and 17% believe that it needs several months or less to achieve victory. Among Ukrainians in Europe, the prevailing opinion is that victory requires more than a year (40%), 23% believe that it takes six months to a year, and only 12% believe in its achievement in the short term. 3% of European Ukrainians do not believe in Ukraine`s victory. In Ukraine, there are 1% of such people.

It is also interesting that among **Ukrainians in Europe support for Ukraine`s accession to NATO (86%) is higher than support for EU membership (83%).**

A survey in Ukraine gave similar results, with the difference that support for joining the EU (85%) is slightly higher than support for NATO (83%).

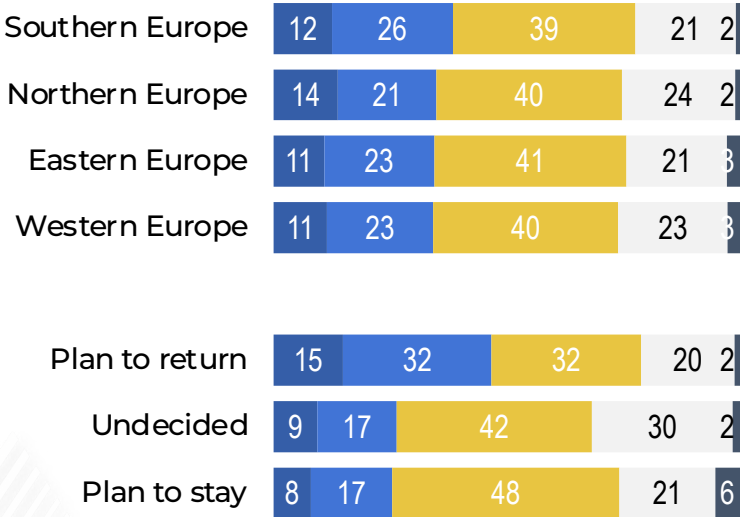


Waiting for victory

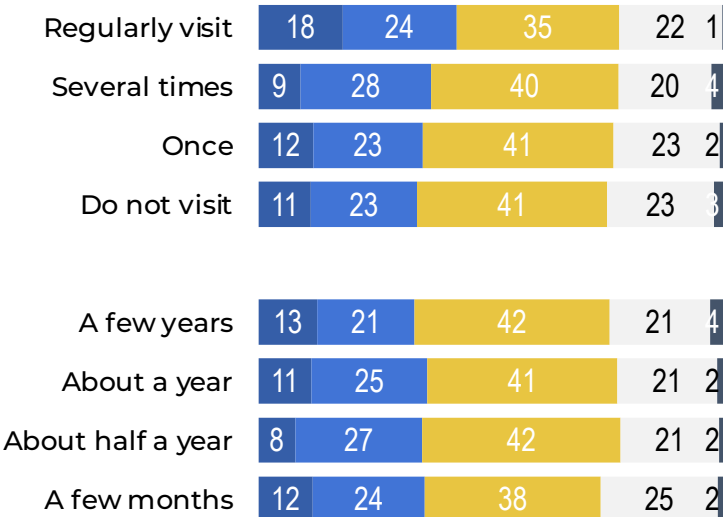
How much time do you think Ukraine needs to win a war with Russia?

■ A few months or less ■ Six months or year ■ More than a year ■ No answer ■ I do not believe in victory

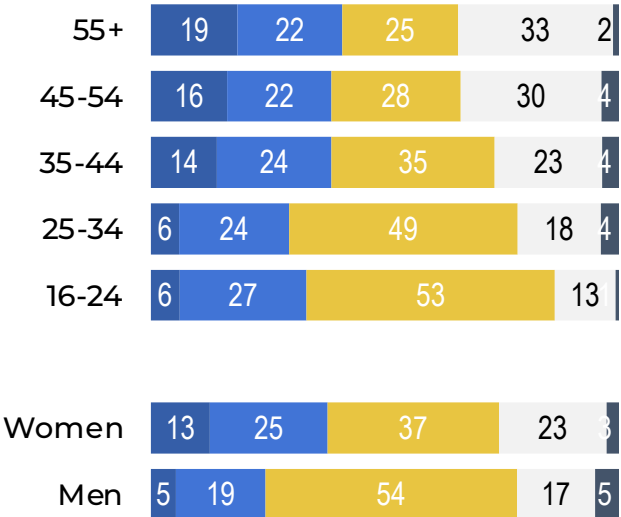
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For issues of cooperation, please contact:
Marianna Tkalych,
Doctor of psychological sciences, professor, founder and
director of the research laboratory Rating Lab.
+38 (050) 322-09-25
info@ratinglab.org