FINDINGS BRIEF

MONITORING THE EXPERIENCES OF PEOPLE DISPLACED FROM UKRAINE

EUROPE | FROM MARCH 2022 TO MARCH 2023

ABOUT

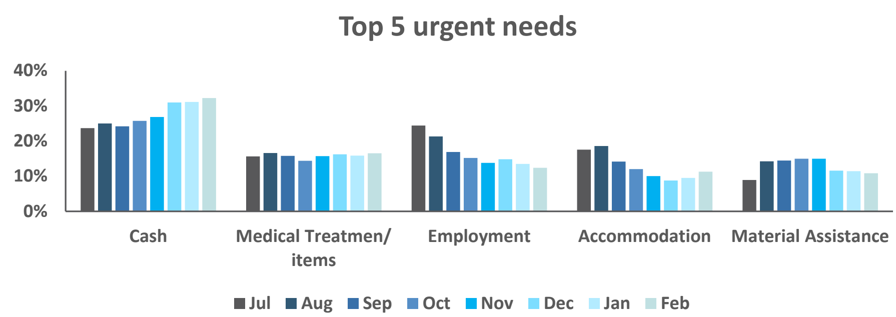
Since March 2022, IMPACT Initiatives has been conducting a monthly survey of people who fled the escalation of hostilities in Ukraine to understand their mobility patterns, needs, integration trajectories and intentions to return, and how these change over time. Respondents were first interviewed after they crossed the border out of Ukraine from 28 February onwards and have since been followed up by IMPACT's team, which conducts monthly phone interviews with the same pool of respondents. While results are not statistically representative, triangulation with other data sources suggests that our sample broadly echoes other available data sources on the population of interest, both in terms of geographic distribution and socio-economic background.

This brief is based on 42,205 phone interviews conducted remotely between 27 March 2022 and 7 March 2023 across 10 rounds with people displaced from Ukraine since the escalation of hostilities on 24 February 2022. The sample is composed of 11,348 respondents whose households make up a total of 32,700 people.

SUMMARY OF KEY FINDINGS

I. A WOMEN'S AND CHILDREN'S RESPONSE: The proportion of displaced households with children is nearly double compared to pre-invasion figures in Ukraine. In 2021, 38% of households in Ukraine had children, almost half the rate of 70% among post-invasion longitudinal respondents. This emphasizes the need for child-focused policies and support mechanisms.

II. CASH, MEDICAL CARE AND EMPLOYMENT ARE PRIORITY NEEDS: As of February 2023, a significant majority of respondents (67%) continue to face unaddressed necessities. The trend shows a decreasing need for employment, yet an increasing need for cash, as well as medical treatment/items. Needs vary by occupation and host country, with caregivers of children and people with disabilities reporting the highest unmet needs, emphasizing the need for tailored support.



III. THE MOST VULNERABLE ARE CAREGIVERS, CHILDREN AND THOSE UNEMPLOYED: Caregivers report the highest percentage of unmet needs, notably cash, material assistance, and medical aid, with 72% reporting unmet needs compared to the average of 67% for all respondents regardless of their main occupation. Additional support is needed, particularly for parents of younger children.

IV. UKRAINIANS ARE UNABLE TO ACCESS PRE-INVASION EMPLOYMENT CATEGORIES: Ukrainians represent a highly skilled labour force as per the survey results, but language barriers hinder employment. Over half of the respondents lack the necessary language proficiency for pre-war job roles, underlining the need for language training.

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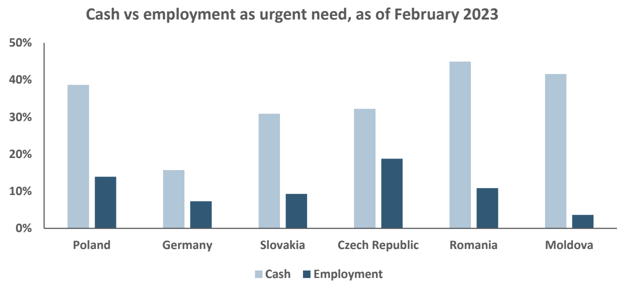
In parallel, respondents have seen a major shift in job categories between the pre-conflict and post-conflict periods, with a substantial increase in elementary occupations and a decrease in managerial roles. The presence of children in households also influences employment rates, with those in Ukraine generally securing more jobs than those in host countries, particularly for households with children aged 3-17. These findings indicate significant shifts in employment and skills among the displaced population, which have important implications for their socioeconomic integration in host societies.

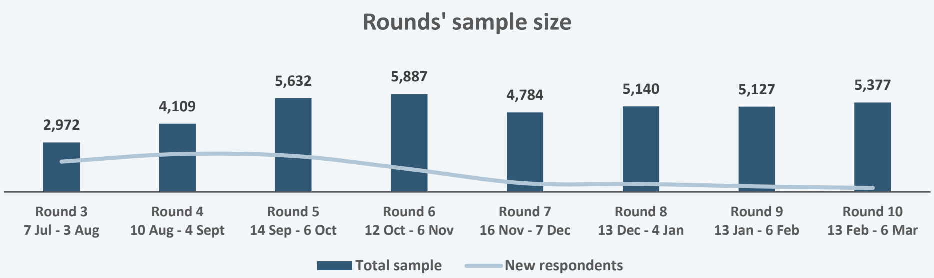


V. RETURN TRENDS ARE DRIVEN BY CONFLICT PROXIMITY IN OBLASTS OF ORIGIN: The majority of respondents come from territories that experienced direct conflict or occupation, accounting for over 60% of the total. This underscores how conflict proximity has significantly influenced decisions to leave Ukraine. However, the progression of the war and successful counter-offensives that liberated several oblasts have also influenced the decision to return to Ukraine. Those displaced from regions that were never under occupation or have been liberated and are now distant from active combat zones show higher rates of return to Ukraine.

VI. LONG-TERM HOUSING REMAINS A PRIORITY: Housing trends for respondents abroad have shifted, with rented accommodations having become more prevalent over time (44%), particularly in Poland and Moldova. Accommodations provided by authorities have also increased in use (21%), most notably in Germany. Volunteer-provided accommodations have seen a gradual decline but it remains significant (13%). There is also a sustained reliance on collective centres, hotels or hostels, which alerts of the difficulties for displaced individuals to move out of these temporal solutions.

METHODOLOGY OVERVIEW

Respondents were initially identified through convenience sampling among people who have crossed the border from Ukraine through a data collection initiative ongoing since 28 February 2022 in Poland, Slovakia, Hungary, Romania and Moldova at border crossings, transit sites and reception centres, with the support of UNHCR, and later also through Viber and Facebook dissemination campaigns. Respondents are called using Viber, WhatsApp and Telegram messaging platforms by a trained team of enumerators who conduct the interviews in respondents' mother tongue and interview them each month on a core module of questions and variable modules included in response to emerging information needs and changing contexts.

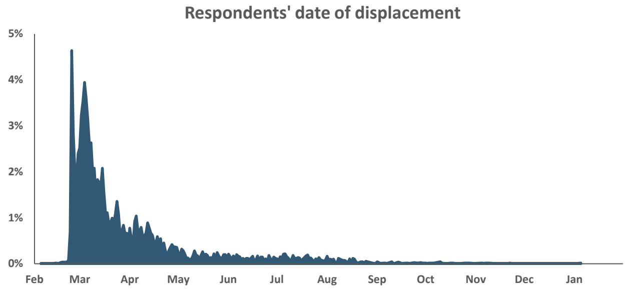


The sample follows a fixed panel plus "births" design, whereby samples of new people displaced are added to the survey sample regularly. The addition of new respondents to the panel allows for a more accurate sample of the dynamic target population, incorporating people displaced after the beginning of the initial data collection. It also allows addressing attrition to ensure a significant sample of respondents over time. Each round of data collection takes place on a fixed monthly schedule and new respondents are included in the panel and interviewed during the next round of data collection following their consent, together with ongoing respondents.

The analysis herein presented is not statistically significant, since it is based on a non-probabilistic sample. The findings speak to the situation of the people interviewed in the study and not to all people who fled Ukraine since 24 February 2022.

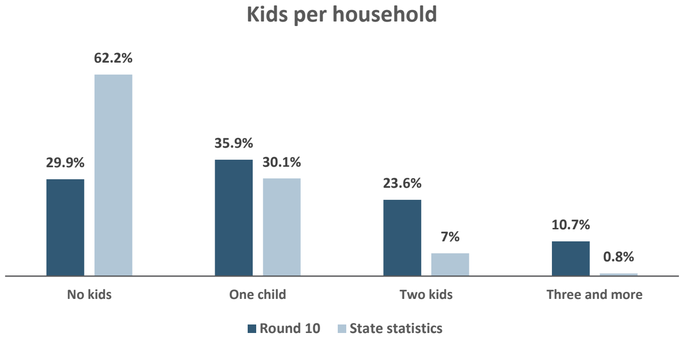
DISPLACEMENT TIMELINE AND DEMOGRAPHIC PROFILE

Demographic findings indicate that there should be a focus on addressing the needs of vulnerable groups, including single-caregiver households, pregnant or breastfeeding women, unaccompanied children, and people with disabilities, and consider the specific needs and experiences of women and various age groups in the response plans.

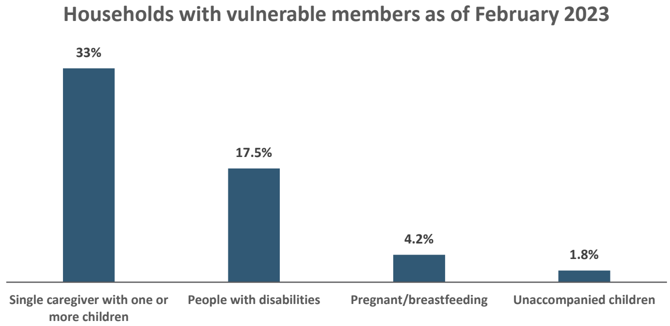


Most respondents have now been in displacement for more than a year, have had time to integrate and their intentions will have been determined by their integration experience, perceived prospects and the situation back in Ukraine. The majority of survey respondents were displaced in the first months following Russian invasion, with over 50% leaving Ukraine before March 15, 2022. Only 10% reported leaving Ukraine after June 1, 2022, and less than 1 % of respondents left from September onwards. This aligns with EU statistics on Temporary Protection whereby 67% of decisions granting the status were taken between March and June 2023.1[1]

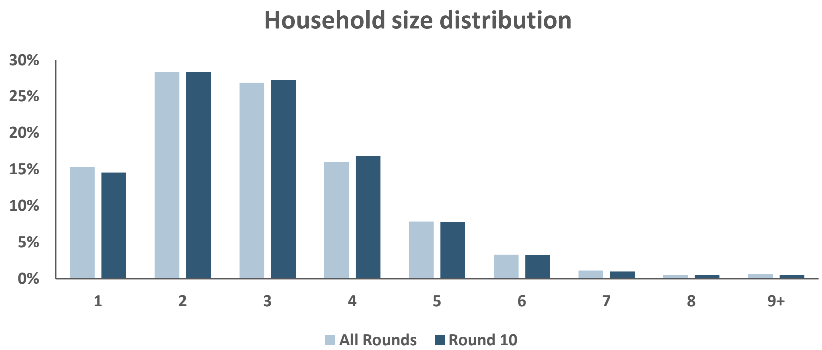
The average household size is slightly higher than pre-invasion levels, and most surveyed households have children, with a significantly higher percentage than the average in Ukraine in 2021. The average household size of the survey respondents as of February 2023 is 2.9, slightly higher than the 2.6 average in Ukraine before the invasion, according to Ukrainian state statistics. This can be associated to households with children being more likely to flee, despite most men staying behind. There are 15.1% of sampled households consisting of 1 person, 29.3% of two; 27.2% of three and 28.4% of four and more. The majority of surveyed households have kids (70.1%), double the average in Ukraine in 2021 (37.8% according to State Statistics Ukraine).[2]



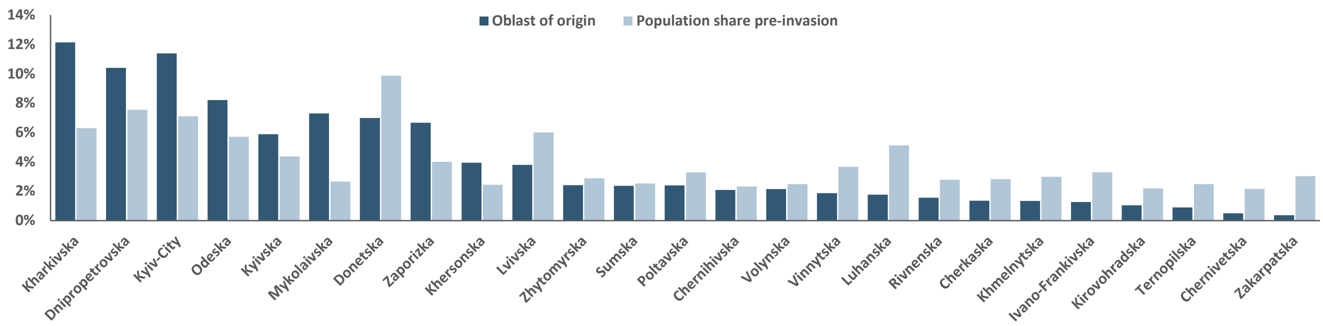
Most households interviewed have one child (35.9%), followed by 23.6% with two kids and 10.7% with three or more. The average number of children per household is 1.2 among all surveyed households referring to 12,411 children. In round 10, the average was also 1.2 kids per household and the results refer to 4,492 children. Single-caregiver households make up 29.9% of all surveyed households, indicating a need for targeted support for this group. Amongst household members, including respondents, children and adolescents comprise 39.5%, similar to 36.1% registered through temporary protection.



The survey highlights the presence of vulnerable groups among the displaced population, with 22.6% of households having at least one pregnant or breastfeeding woman, unaccompanied child, or person with a disability as of round 10. The most reported vulnerability is a disability, with a total of 6.4% of people from all household members having disabilities and more than one-sixth of all households (17.5%) reporting at least one person with disabilities. Households with at least one pregnant or breastfeeding woman make up 4.2%, and only 1.8% report having at least one unaccompanied child, and 0.7% of unaccompanied children among all household members.



Respondents' oblast of origin



Most respondents are women (93% as of round 10), between the age of 31 to 40 (37.4%) and 41 to 50 (24.4%), whereas men only make up for 7% of surveyed respondents. Among household adults, 78.9% are women and 21.1% are men, matching the distribution of adults who were granted temporary protection. This suggests that the needs and experiences of women and particular age groups should be at the centre of policy and humanitarian response efforts. Together, women and children make up more than 87.6% of the population displaced from Ukraine.

OBLAST OF ORIGIN

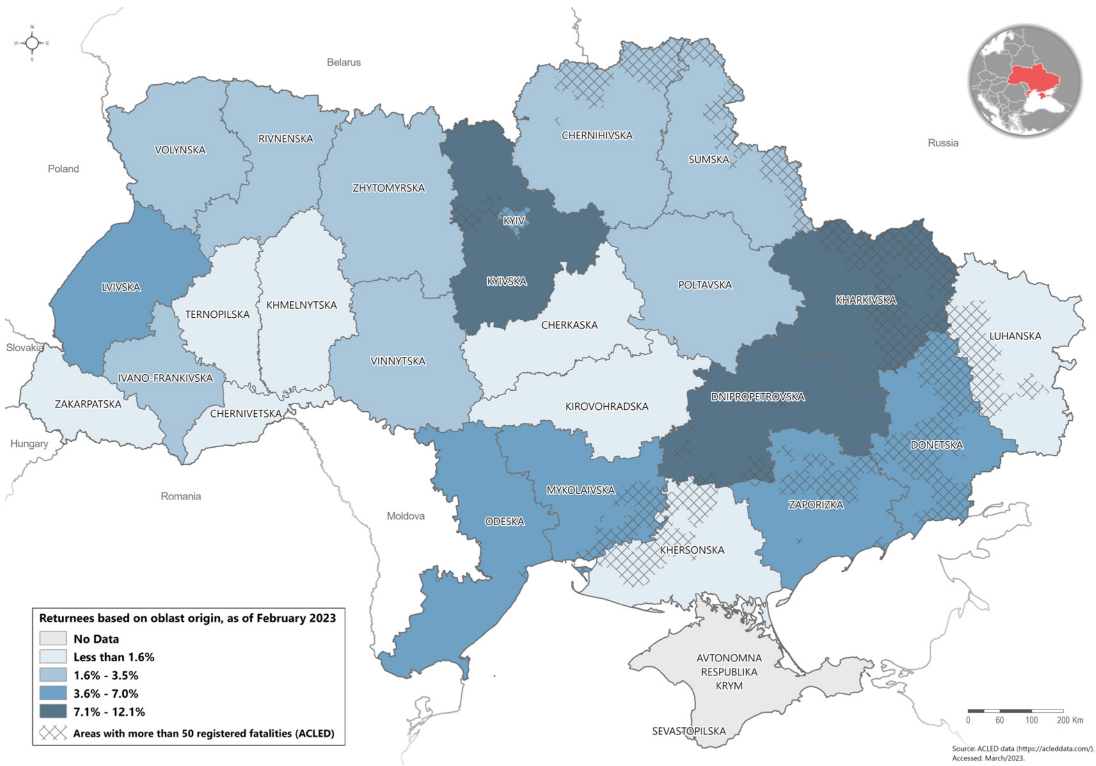
The majority of respondents come from territories that were or continue to be occupied (60.4%), and direct hostilities or occupation, as well as proximity to occupied territories, played a significant role in deciding to leave Ukraine.

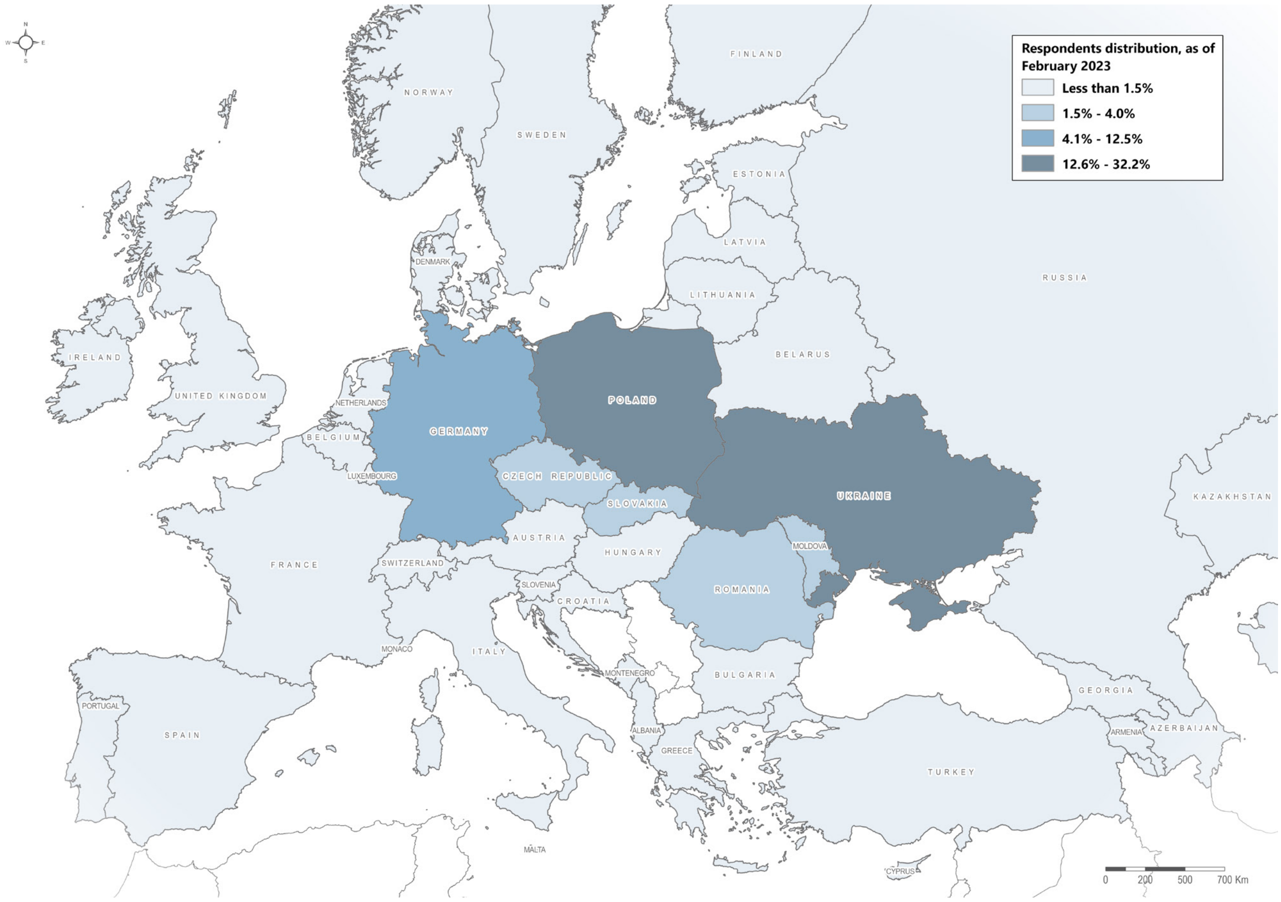
Respondents come from across the 24 oblasts in Ukraine, as well as from the city of Kyiv. Most come from oblasts that were occupied at some point or heavily attacked. The majority come from territories which were or continue to be occupied (60%), including 41% from already liberated territories and 19% from still occupied oblasts. The remaining 40% of respondents lived in oblasts that have not been occupied.

Lvivska, Odeska and Dnipropetrovska oblasts have never been taken by Russian forces but rank in the top-10 oblasts. Lvivska, bordering Poland, has lower border-crossing costs. Dnipropetrovska, the second-largest oblast by population, borders five oblasts that have been under Russian control or attacked. Odeska, while not seized, was shelled during the invasion's initial months and was seen as a key strategic corridor connecting the areas occupied by Russia to Transnistria region.

Direct hostilities, occupation, or proximity to occupied territories, has been a clear key factor for making decisions about leaving Ukraine. Eight of the top-10 origin oblasts among respondents border Russia, Belarus, Transnistria or Ukrainian territories occupied before 2022 and concentrated most military forces. Lviv oblast is the only oblast from the West macro-region of Ukraine among the most common. Overall, 65,3% of the respondents lived in oblasts bordering active military force concentrations.

When taking into consideration the population distribution across Ukraine's oblasts before the invasion, the proportion





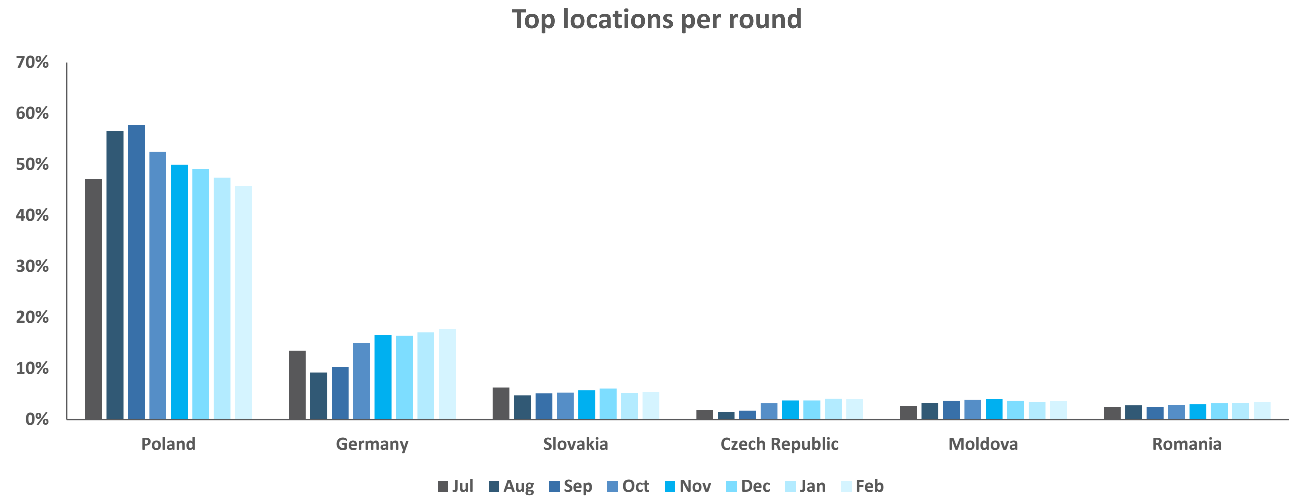
of respondents is higher for those oblasts directly affected by the war. The biggest difference between the proportion of respondents' density and the population density by oblast is observed in Mykolaiv oblast with a three times higher proportion of respondents from this region than the oblast population share. Kharkivska and Kyivska oblasts follow, where the difference is almost twofold. The most prevailing oblasts in the sample compared to the initial population of each were from Mykolaivska, Kharkivska, Kyivska, Zaporizka, Khersonska, Odeska, Dnipropetrovska oblasts, and Kyiv-city (in descending order). These 8 administrative units have a larger proportion of respondents to the proportion of the population. Despite the significant impact on Luhansk and Donetsk oblasts, a small proportion of respondents originate from these regions. This could be partially attributed to the absence of humanitarian corridors and the need for individuals to flee via the Russian border.

The development of the war and the successful counter-offensives that have liberated several oblasts has significantly impacted respondents' choices to return to Ukraine. Those whose oblast of origin was never under occupation, have had rates of return ranging between 24.8% from Odeska as the lowest to 50% from Volynska as the highest. Respondents from oblasts that have been liberated and are now further away from the active battle lines have relatively high percentages of returns: 31.8% of respondents from Kyiv-City, 33.6% from Sumska, 29.8% from Mykolaivska, 34.3% from Chernihivska, 33.2% from Kyivska and 26.6% from Kharkivska. On the other hand, Zaporizka, Donetsk, Luhanska, and Khersonka oblasts, which persist at the frontline, demonstrate the lowest return rates, with only 10,2% to 20% of respondents from these oblasts having returned to Ukraine. Among these returnees whose origins lie in oblasts no longer under occupation, approximately 72.2% have resettled in their oblast of habitual residence before the war. Despite the proximity to the battlefront, 67.1% of respondents from Zaporizka oblast have returned there, 29.4% returned to Donetska and 15.4% to Khersonska.

CURRENT LOCATION ABROAD

As of February 2023, a total of 70,2% of the 5,377 survey respondents remain abroad. Out of those abroad, the majority are concentrated across countries bordering Ukraine, as well as in Germany. Ten countries in Europe host 87% of respondents abroad, led by Poland (45,8%) and followed by Germany (17.7%), Slovakia (5.4%), Czech Republic (3.9%), Moldova (3.6%), Romania (3.4%), United Kingdom (2.1%), Netherlands (1.9%), France (1.7%), and Spain (1.3%).

Over the last eight rounds, there has been a decreasing trend in the number of respondents in Poland, starting from August. On June 1, Poland stopped providing free-of-charge public transportation to Ukrainians, and from July 1, Poland stopped paying compensation to host families. The share of respondents in Poland has since decreased from 60,2% (R4) to 45.8% (R10). Starting from the same 4th round, there is an increase of respondents staying in Germany: from 9.8% in August to the highest 17.7% during the last round in February.



HOUSING AND ACCOMMODATION

The survey findings show that, as of February 2023, almost half of all respondents residing abroad were renting their accommodations (43.7%), marking an increase from 35.4% in July 2022. The second most common accommodation in February was provided by authorities (20,9%), a significant shift from July when this option only accounted for 10.4% and was in fifth rank. Staying with volunteers (private individuals who have agreed to host) remains among the top three forms of accommodation, despite a gradual decline from 19.5% in round 3 to 13.3% in round 10.

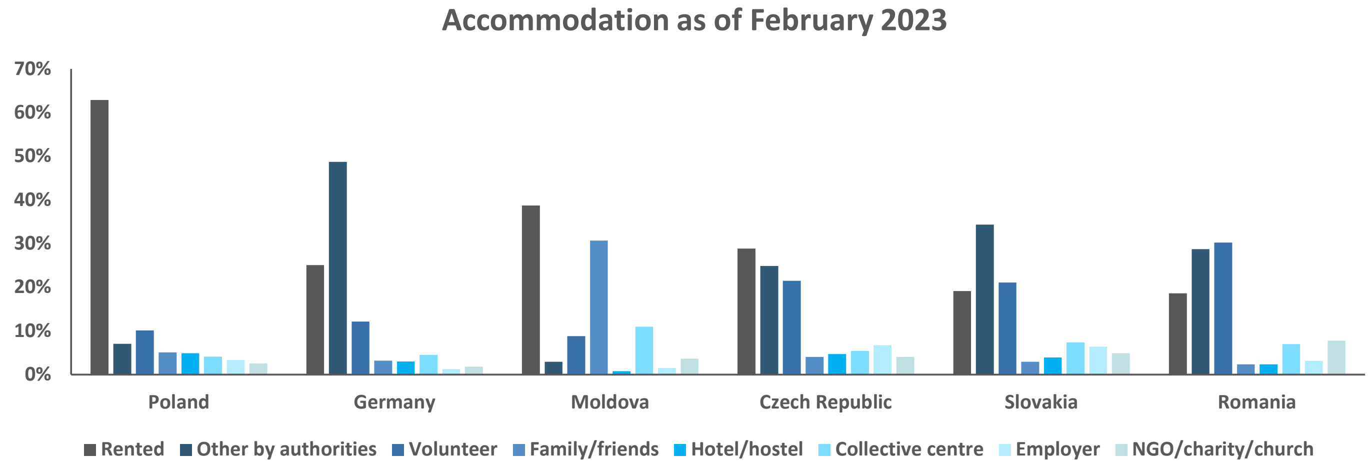
Rented accommodations are most prevalent in Poland (62.9%), nearly twice as in Moldova (38.7%) which has the second highest rate. Both countries have experienced a notable increase since round 3. In the Czech Republic, Germany and Slovakia, the proportion of rented accommodations has remained stable over the past year, currently at 28.9%, 25% and 19.1% respectively. In contrast, the share in Romania has been decreasing, reaching 18.6% in February.

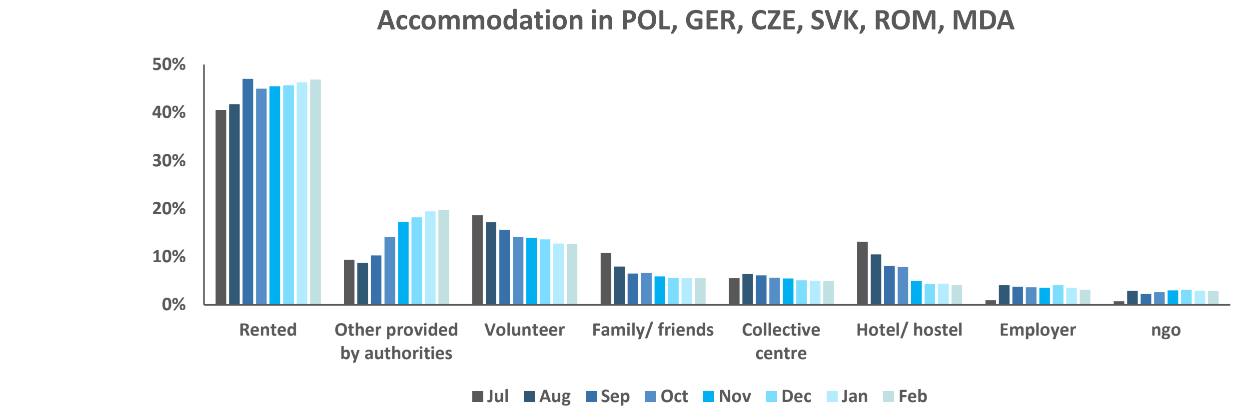
As of Round 10, half of the households in Germany lived in accommodations provided by authorities (48.7%), the highest rate among the monitored countries. Slovakia also has a relatively high rate (34.3%), whereas in Poland only 7.1% of respondents stay in accommodations provided by authorities.

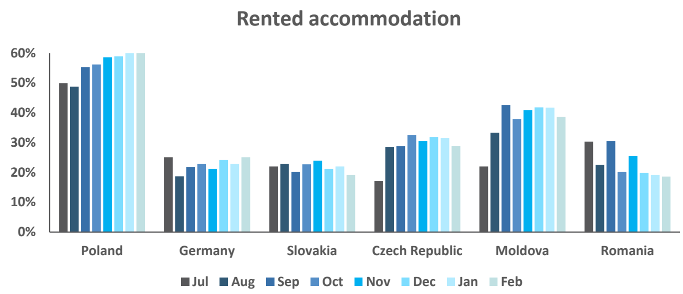
However, after one year from the full-scale invasion, respondents in the top-6 hosting countries are still living in accommodation provided by volunteers, with the lowest rate in Moldova (8.8%) and the highest in Romania (30.2%), the Czech Republic (21.5%) and Slovakia (21.1%). Countries with the highest rates of volunteer-provided accommodations offer compensation to host families. In contrast, Poland (10.1%) and Germany (12.1%) do not provide compensation, resulting in lower rates of people living with volunteers. Despite the lack of cash assistance, the results remain significant. Moldova does not offer cash assistance to hosts, but UNHCR provides financial aid to host families.

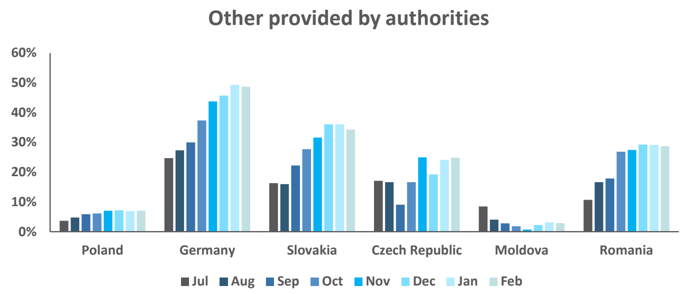
The Czech Republic and Slovakia have the highest share of respondents living in accommodation provided by the employer at 6.7% and 6.4% respectively, compared to Germany (1.5%) and Moldova (1.2%). Respondents living in Moldova have the highest rate of living with family/friends (30.7%), resulting from strong ties and the presence of relatives and friends. Those in Moldova and Poland mainly rely on their own resources, as only 17.4% in Moldova and 13.7% in Poland receive accommodations from NGOs or authorities, compared to 44.8% in the other four popular host countries.

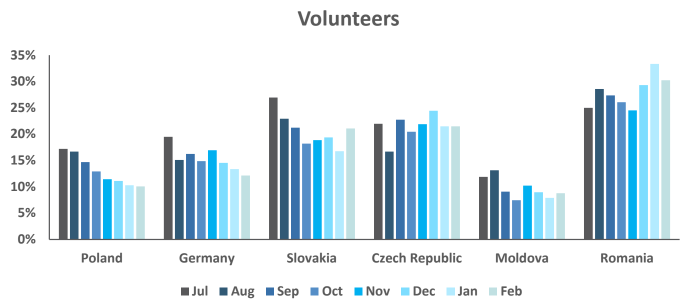
Poland and Germany have the lowest rates of respondents living in collective centres at 4.1% and 4.5%, respectively. Poland has continuously had the lowest share of respondents in collective sites, below 5%. Comparatively, Germany recorded in August

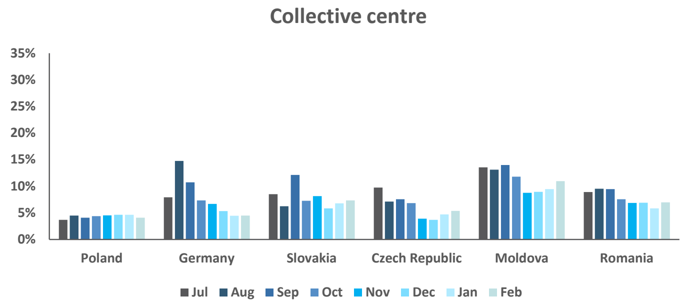








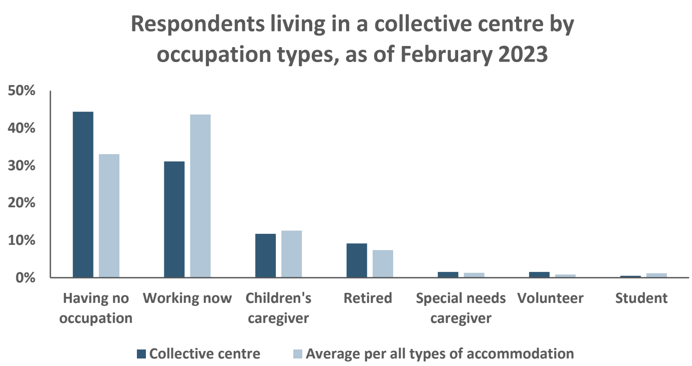




the highest share among all countries but has drastically reduced it since. Instead, Moldova currently records the highest rates (10.9%), down from those recorded during the first half of the year but again on the rise since November.

Simultaneously to the decrease in collective site accommodation, Germany has doubled the prevalence of other forms of authority-provided accommodations from 24.8% in July to 48.7% in February 2023, with Slovakia and Romania showing similar increases. On the contrary, Poland has kept this form of accommodation below 7.2%, while Moldova has seen a decrease from 8.5% to 2.9%.

Overall, there has been a shift in accommodation preferences among respondents residing abroad from July 2022 to February 2023, with rented accommodations becoming more popular,



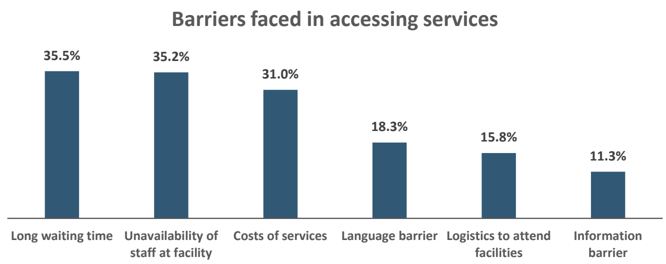
particularly in Poland and Moldova. Authority-provided accommodations have gained prominence, with Germany displaying the highest rate. Despite the time elapsed since the full-scale invasion, volunteer-provided accommodations remain significant across the top-6 hosting countries, as well as collective centres (6.6%) and hotels or hostels (3.3%). These findings underscore the evolving landscape of accommodations for those displaced by the conflict and the importance of addressing outstanding challenges in public policy to ensure the well-being and continued support towards durable solutions of those displaced by the conflict.

CHILD PROTECTION, EDUCATION AND CHILDCARE

The survey shows that, according to child caregivers, the most negative effect on the wellbeing of children and adolescents had psycho-social issues and the language barrier in their host community. Caregivers reported their children were mostly worried about their future (18%), not having enough friends in their host location (12.1%), not knowing the language of the host community (10.5%) and they were missing/worrying about family and friends in Ukraine (9,5%). Child consultations and FGDs with caregivers in Romania and Poland confirmed these priority concerns that affect children’s well-being. In both countries, children also often reported instances of discrimination and sometimes physical violence, both inside and outside of schools. In Poland specifically, children in several groups also said that they were worried about the difficulties of their family in finding accommodation. Due to the cuts in housing support to refugees in collective centers until the summer of 2023, these concerns are likely to increase.

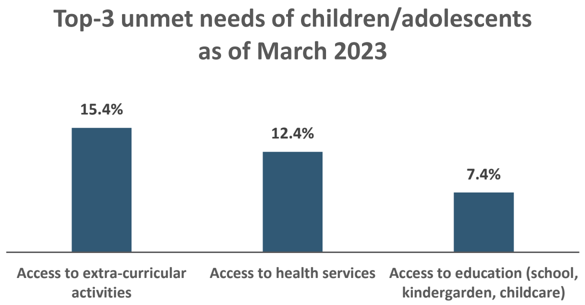
Child caregivers generally had significant trust in host governments' ability to provide for the safety and well-being of their children. When asked about the three most trusted actors to which they would go when their children needed help, survey respondents most commonly highlighted the police (32.2%), government social services (25.5%) and volunteer/community organizations (22.4%). At the same time, only few respondents reported having tried to access these three services.

Among caregivers, 33.6% reported that their children have at least some unmet needs, with 26% mentioning just one need and the remaining 7.6% specifying two or three. The most frequently cited needs include access to peer activities such as extra-curricular activities (15.4%), access to health services (12.4%), and access to education (7.4%), including kindergarten and childcare. Upon arriving at their current location, children/adolescents and their caregivers have primarily sought physical health services (69.8%), schools/universities (65.6%), extra-curricular activities (38.9%), childcare (23.5%), governmental social services/social workers (18.4%), and emergency health services (14.3%).



While many services were successfully accessed, some proved more challenging than others. The survey results indicate difficulty accessing extracurricular activities (18%), childcare (17.5%), emergency health services (13.3%), and physical health services (10.7%). The most accessible services were schools, with only 3% of respondents reporting being unable to access them, as well as government social services/social workers (4.7%). Common barriers faced when accessing services included long waiting times (35.5%), unavailability of staff at facilities (35.2%), service costs (31%), language barriers (18.3%), logistical challenges attending facilities (15.8%), and information barriers (11.3%).

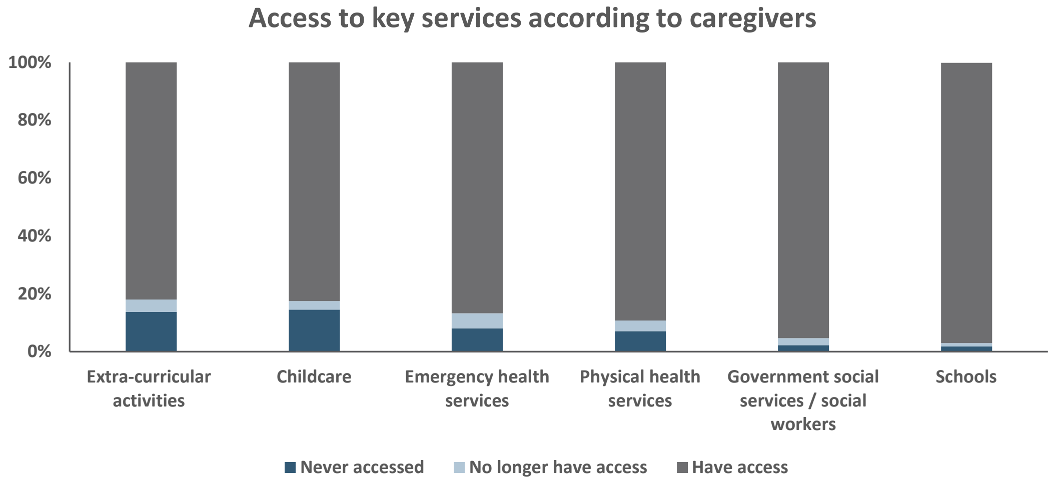
Child consultations and FGDs with caregivers in Poland and Romania confirmed children's need for, and difficulty to, access extra-curricular activities, especially sports. Children often highlighted that they needed more time outside of school to relax and do fun activities. The main barriers to accessing



those activities were reported to be high costs and lack of available options relevant to children's interests. In addition, many of the interviewed children in Poland and Romania both attended online schooling in Ukraine and in-person education in local public or Ukrainian-organized schools, which limited their free time significantly. In Poland specifically, children attending the second "shift" of Ukrainian school hubs said that studying during the afternoon made it difficult for them to have a healthy social life. Increasing the availability and time for fulfilling activities outside of school would be crucial to address children's pressing psycho-social needs highlighted above.

The generally high access to schools and universities shown in the survey results must be taken with caution. Fist, the results vary across countries: In countries like Poland and Germany, more than 90% of respondents reported having successfully accessed schools and universities, while in Romania, the share was around 82%. Second, there are additional barriers related to the quality of learning in schools, which was identified through qualitative interviews: Children in Poland and Romania reported that the language barrier made it very difficult to study in regular schools in both countries. In addition, many of those students who participated in online learning in schools in Ukraine complained about the low quality of that learning experience, mainly due to connectivity issues and teachers' difficulties of remotely reviewing the submitted results. Finally, children also mentioned experiences of bullying/discrimination from local children and – mainly in Poland – also from teachers. This shows that there are still challenges in terms of social inclusion among host population and refugees, of the quality of learning for Ukrainian children in hosting countries, and the barriers children are facing in having quality access to education.

The above-mentioned difficulties of accessing childcare, as compared to other services, were confirmed through caregiver FGDs and Key Informant Interviews with service providers in Romania and Poland. Caregivers in Romania mentioned the limited availability of kindergartens as the major barrier to accessing childcare. Moreover, they explained that the lack of childcare options negatively affected their ability to find employment, and was a key barrier to integration, particularly for single caregivers and those with young or many children. Moreover, as shown above, access to education and childcare was reported as one of children's top 3 unmet needs by



caregivers in the survey, which could point to both challenges in the quality of education and in accessing childcare.

EMPLOYMENT AND SKILLS

Germany has the highest unemployment rate among respondents at 57.9% but also presents the lowest urgent need for employment and cash assistance. Caregiving for their children is the second most common occupation at 16%, while only 14.2% work in their host country. Germany's employment rate is the lowest among the top host countries.

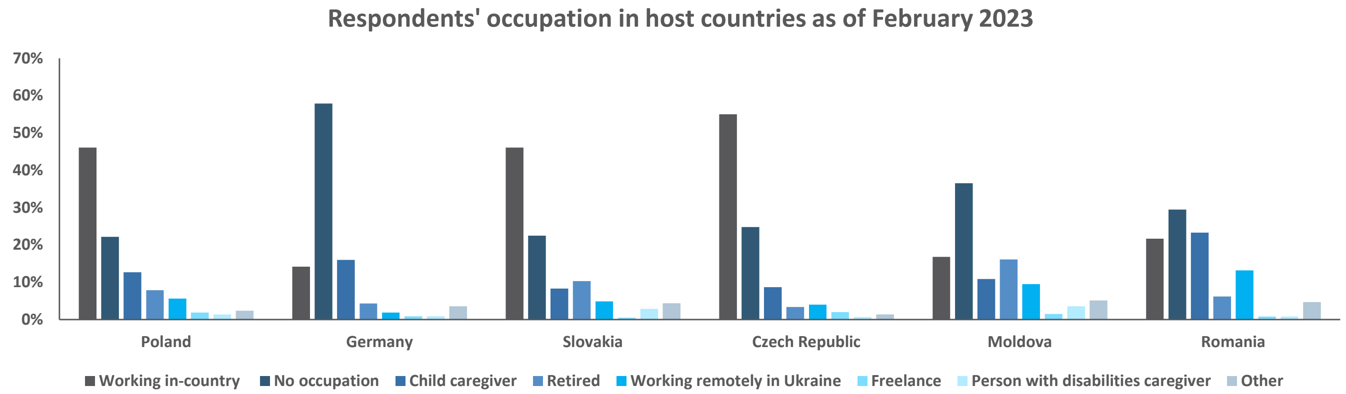
In Moldova, 36.5% of respondents reported having no occupation, while 16.8% work in the host country. Moldova has the highest percentage of respondents not working due to age (16.1%) and one of the highest percentage working remotely in Ukraine (9.5%) after Romania. About one-third of respondents located in Moldova and that reported working, do so remotely in Ukraine, possibly due to the smaller differences in living standards and average earnings between the two countries.

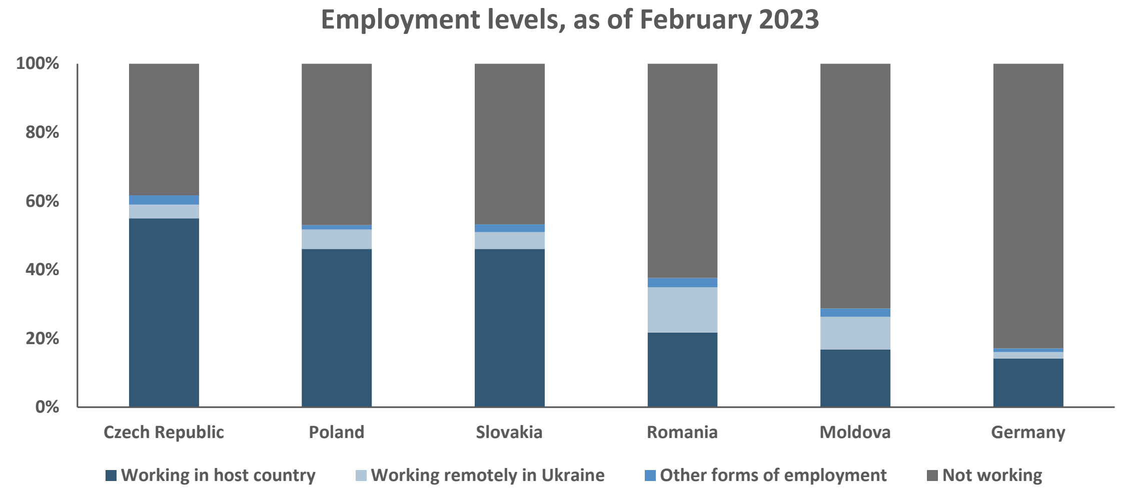
In Poland, the most frequent response is working in the host country (46.1%). "No occupation"(22,2%) is the second most common, however lower than in the other countries. Caregiving for children is the third most popular occupation at 12.7%. Poland has one of the highest employment rate among the top host countries. Like Poland, the most common response in Slovakia is working in the host country (46.1%). "No occupation", and "retired" follow at 22.5% and 10.3%, respectively. Slovakia has the second-largest share of retired respondents among the comparison countries. The Czech Republic has the highest share of respondents working in their host country (55%). One-fourth of respondents report having no occupation, while 8.7% indicate that their primary occupation is caregiving for children.

Most of the respondents in Romania reported having no occupation (29.5%). Among the top-6 hosting countries, Romania has the highest share of respondents whose occupation is taking care of their children (23.3%). While the employment rate of surveyed people working in the current country remains not very significant (21.7%), Romania has the highest rate of people working remotely in Ukraine (13.1%).

The total amount of people working, including having a remote job, owning a business and being a freelancer, adds up to 61.7% in the Czech Republic, making it the country where respondents have the highest employment rate. Poland and Slovakia follow with 54.4% and 52% respectively. 37.3% are working in Romania, while almost 40% of these people work remotely in Ukraine or have their own businesses/freelancers. Moldova has slightly more than one-quarter of respondents who work there (28.5%), while the employment rate of Germany is the lowest – 17.4%, less than every fifth interviewed person works while staying in the country.

Germany and Moldova's low employment rates can be attributed to several factors, such as the small difference between average income from government assistance and average salary, as well as language barriers. The wage gap between respondents and



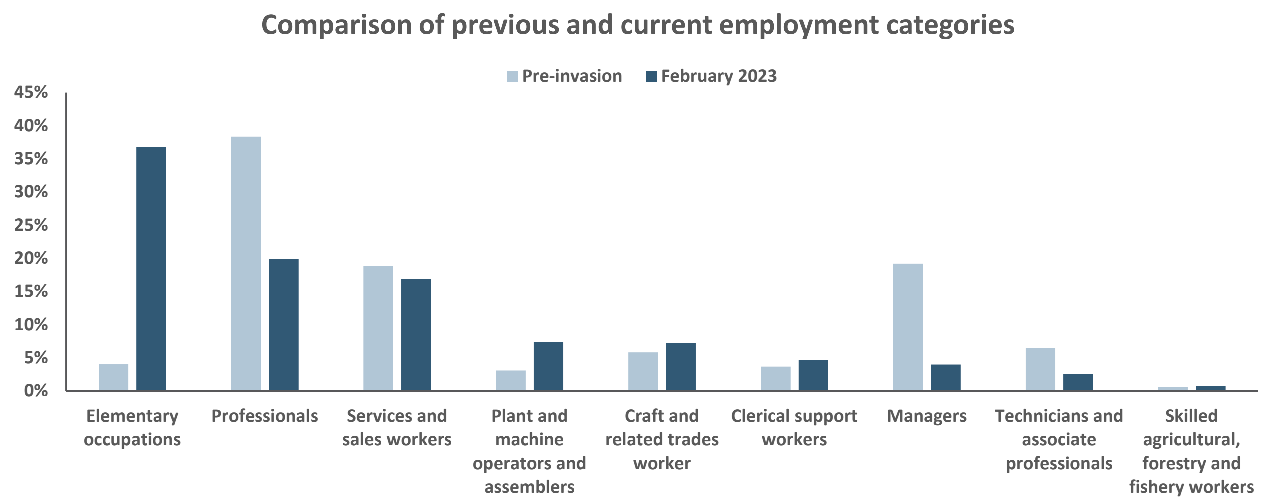


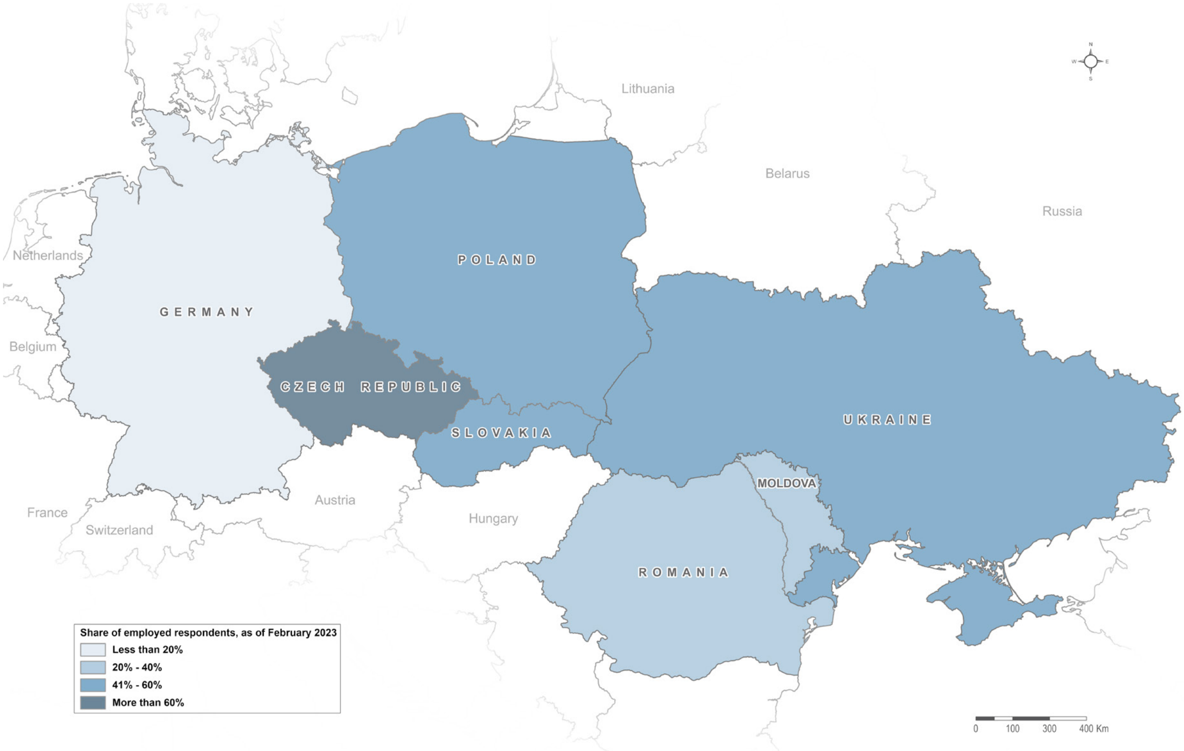
host country citizens also affects employment rates, with the most significant difference in Germany. Romania and Moldova also have national languages belonging to different language groups than Ukrainian, which may also contribute to lower employment rates due to language barriers. In contrast, Czech, Polish, and Slovak languages are part of the Slavic language group, which may facilitate better work opportunities for Ukrainian respondents in those countries.

The employment rate in Germany is significantly lower than in other top host countries, with only 17.4% of respondents working while staying in the country. The difference between governmental assistance and average salary by household, is only 7% in Germany, compared to 22% in Moldova and over 60% in other host countries. In Poland and Slovakia, the average salary by household is 256% higher than the governmental assistance by household, which could incentivize displaced households to seek employment, rather than relying on government assistance. The gap, combined with language barriers, may contribute to the lower employment rates observed in Germany and Moldova.

The analysis of respondents' employment status before the full-scale invasion and their current job categories reveals shifts in qualifications and practical skills after one year of conflict. A significant shift in job types emerged between the pre-conflict and post-conflict periods. Prior to the war, the top three employment categories in Ukraine consisted of Professionals (38.3%), Managers (19,2%), and Service and Sales Workers (18.8%), which together accounted for 76.4% of respondents. However, by February 2023, the leading three categories shifted to Elementary Occupations (36.8%), Professionals (19.9%), and Service and Sales Workers (16.8%), making up 73.5% of all options. The most notable change is the substantial increase in Elementary Occupations, from 4% to 36.8%—a nine-fold difference. Managerial positions experienced a nearly five-fold decrease, from 19.2% to 4%. Technicians and Associate Professionals saw a 2.5 and 1.9-fold drop respectively, while Plant and Machine Operators, and Assemblers raised by 2.4 times. The least affected categories were Skilled Agricultural, Forestry, and Fishery Workers (increasing by 1.3 times), Clerical Support Workers (increasing by 1.3 times), Craft and Related Trades Workers (increasing by 1.2 times), and Services and Sales Workers (decreasing by 1.1 times).

In terms of daily employment, 36.2% of respondents found work abroad compared to 44.7% in Ukraine. Considering all forms of employment, including freelance, self-employed, and remote work, the difference is 43.4% abroad and 51.3% in Ukraine, a difference of 8.5% and 7.9% respectively.





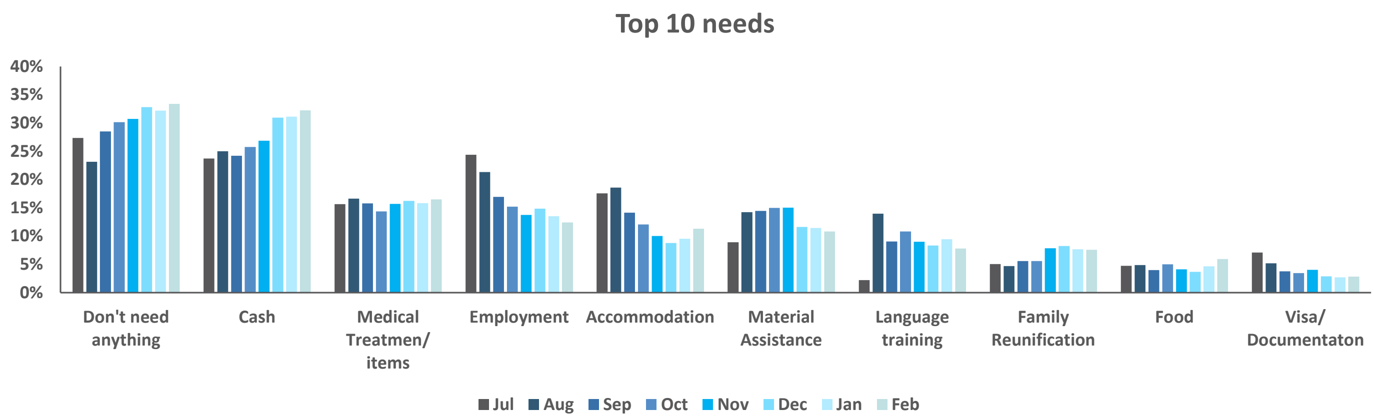
No significant difference exists in employment rates between respondents who returned to Ukraine and those who remained in host countries with children aged 0-2 in their household: 19.7% of respondents in host countries work while having children aged 0-2, compared to 20.4% in Ukraine. However, a difference appears for respondents with children aged 3-5: In Ukraine, 38.9% found daily jobs compared to 31.9% abroad. The gap widens for respondents with children aged 6-12: with 40.6% in host countries to 48.9% in Ukraine. Respondents in whose households there are children aged 12-18 showed the biggest difference: 53.8% in Ukraine to 43.5% displaced externally. Returnees with children aged 3-17 managed to secure more jobs in Ukraine than respondents with children in host countries.

PROTECTION AND NEEDS

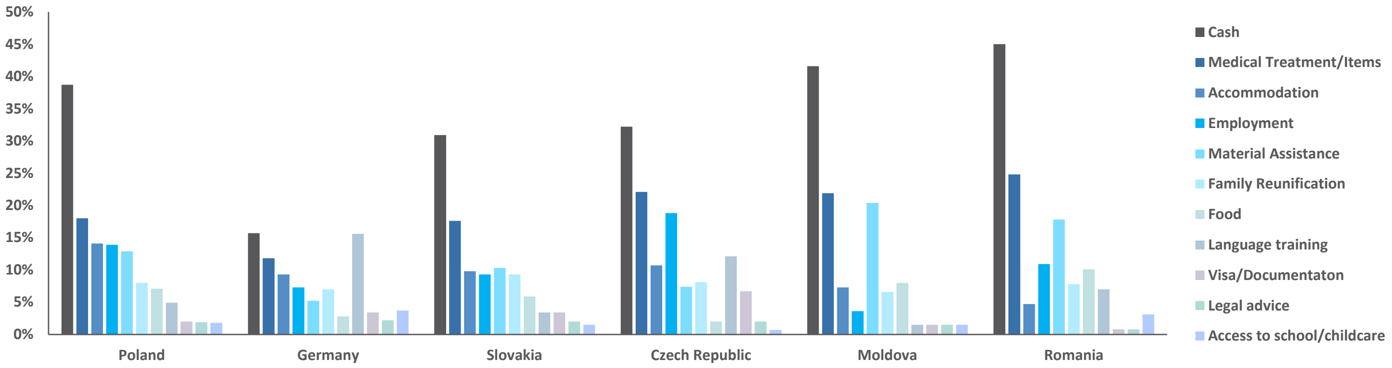
As of February 2023, 33.4% of respondents indicated that they had no pressing needs, up from 27.3% in July 2022. This suggests that a considerable 66.6% of respondents continue to face unaddressed urgent necessities.

A downward trend is observed for the need for employment, while the need for money continues to grow. This could be due to the decrease in cash aid from host countries, volunteers, and non-governmental organizations over time, as well as global inflation. Between July and February, the percentage of responses in the ‘’employment” category fell by nearly half: from 24.4% to 12.4%. In contrast, the need for cash increased by almost 35% from its initial value during the same period: from 23.7% in round 3 to 32.3% in round 10. Most host countries’ legislation stipulates that cash assistance ceases when a person starts working. However, a year since the invasion, respondents' language proficiency in the host country remains inadequate to obtain a more qualified job with a higher salary, as they had before the war.

Accommodation needs have also decreased, correlating with cross-round accommodation results showing increases in "rented accommodation" and "other accommodation provided by authorities" and decreases in less-stable arrangements like "staying at hotel/hostel" and "provided by volunteer."



Main needs as of February 2023



"Medical treatment/items" remains the second most common need, with 16.5% of respondents noting it as an urgent unmet requirement in February 2023. The prevalence of this need has remained constant throughout all survey rounds. The need for language training has also decreased over time, from 13.6% to 7.8% between the 4th and 10th rounds.

Moldova has the lowest need for employment (3.6%), but one of the highest need for cash (41.6%). This is the most significant difference among the top-six countries. In all countries, cash is the most reported need, ranging from 15.7% in Germany to 45% in Romania, followed by medical treatment/items, which varies from 24.8% in Romania to 11.8% in Germany, where it ranks as the third most urgent need.

Caregivers (71.7%), retired people (71.1%) and people with no occupation (70.7%) reported the highest urgent needs compared to those employed in the current country (61.1%). The most common need across all occupation types was cash, with 39.4% of retired individuals, 33.5% of unemployed persons, and 33.1% of caregivers, compared to 30.3% of those employed in the current country reporting it as an urgent need. The second-largest set of answers pertains to medical treatment/items, with the highest need among retired individuals (31%), caregivers (19.1%), unemployed persons (15.2%), and those working in the current country (15.1%). The third most urgent need by occupation type varies: material assistance ranks third for caregivers (17.2%) and retired individuals (11.2%); employment is the second most popular answer for unemployed persons (22%). The need for accommodation ranks third among individuals working in the current country (13.3%).

In summary, the most urgent needs reported by respondents vary by country and occupation type. While the need for employment has generally decreased over time, the demand for cash assistance continues to grow. Medical treatment/items consistently rank as the second most common urgent need. Accommodation needs have decreased, reflecting changes in respondents' living situations. The least affected group in terms of urgent needs are those working in their current host country, while caregivers of children, retired individuals and caregivers of people with disabilities report the highest levels of unmet needs. These findings can inform targeted support and intervention strategies to address the specific needs of different groups within the displaced population.

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ABOUT IMPACT INITIATIVES