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Ukrainian refugees after three years abroad. The fourth wave of the research

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NUMBER OF UKRAINIANS ABROAD



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There are 5.2 million Ukrainians outside of Ukraine (+0.3 million over the year)

As of the end of November 2024, 3.7 million Ukrainians remain abroad, which is 300,000 more than in January. In total, 43 million people have left since the start of the war, and 39.3 million have returned.

According to an Info Sapiens poll, 6.6% (239,000) of Ukrainians left for Europe via Russia and Belarus, down from 7.5% in January 2024.

According to the UN, the number of Ukrainian refugees in Russia and Belarus is about 1.3 million. This figure is the same as last year.

This brings the total number of Ukrainian refugees to 5.2 million. As of January 2024, the number was 4.9 million.

There are still 3.7 million Ukrainian refugees abroad who have fled across the border with European countries



NUMBER OF UKRAINIANS ABROAD

Distribution of Ukrainian refugees by host country

- As of the end of November 2024, about 4.2 million Ukrainians have temporary protection status in EU countries.
- The largest numbers of refugees are in Germany (1.3 million people), Poland (951.6 thousand), and the Czech Republic (381.2 thousand).
- In terms of refugees per capita, the Czech Republic leads with approximately 35 Ukrainians per 1,000 residents.
- From January to November 2024, the share of men among refugees in Europe increased from 37% to 39%, with the largest rise recorded in Bulgaria - up 8 percentage points (from 35% to 43%).
- Outside Europe, the countries hosting the largest number of Ukrainians are Canada (298.1 thousand people), the United Kingdom (253.5 thousand), and the United States (187 thousand).





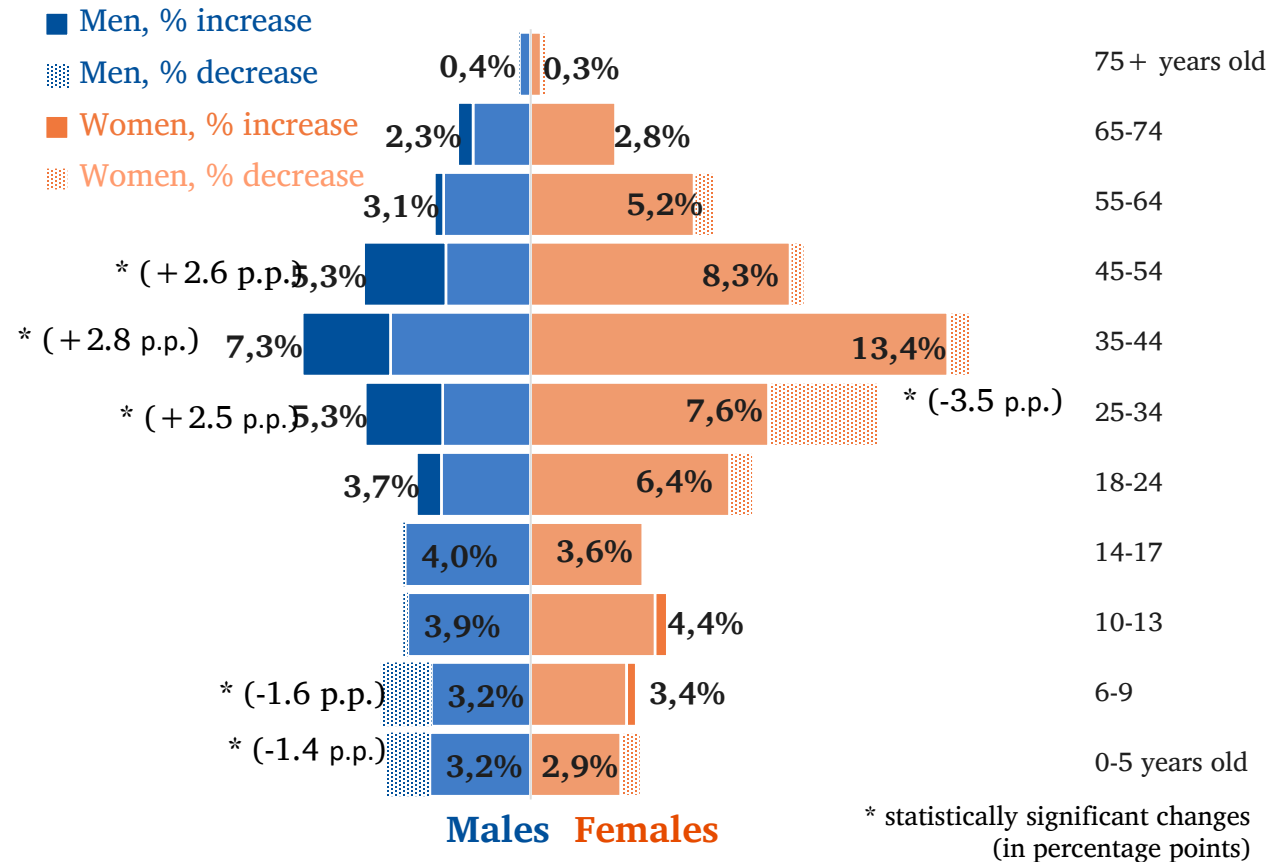
WHO EXACTLY LEFT UKRAINE?

WHO EXACTLY LEFT UKRAINE?

Most refugees are women aged 35-44 and children

- The majority of refugees are adult women (44%).
- Adult men make up 27% of refugees.
- Since January 2024, the share of minors has decreased from 32% to 29%.
- The relative majority of Ukrainian refugees abroad are in Germany and Poland - 20% and 18% respectively.
- Most of the refugees we surveyed came from the eastern and northern regions of Ukraine - 33% and 28% respectively.
- The share of surveyed Ukrainian refugees who had higher or incomplete higher education in December 2024 remains at 74%.

The share of women aged 25-34 among Ukrainian refugees has decreased



HOW DO UKRAINIAN REFUGEES LIVE?

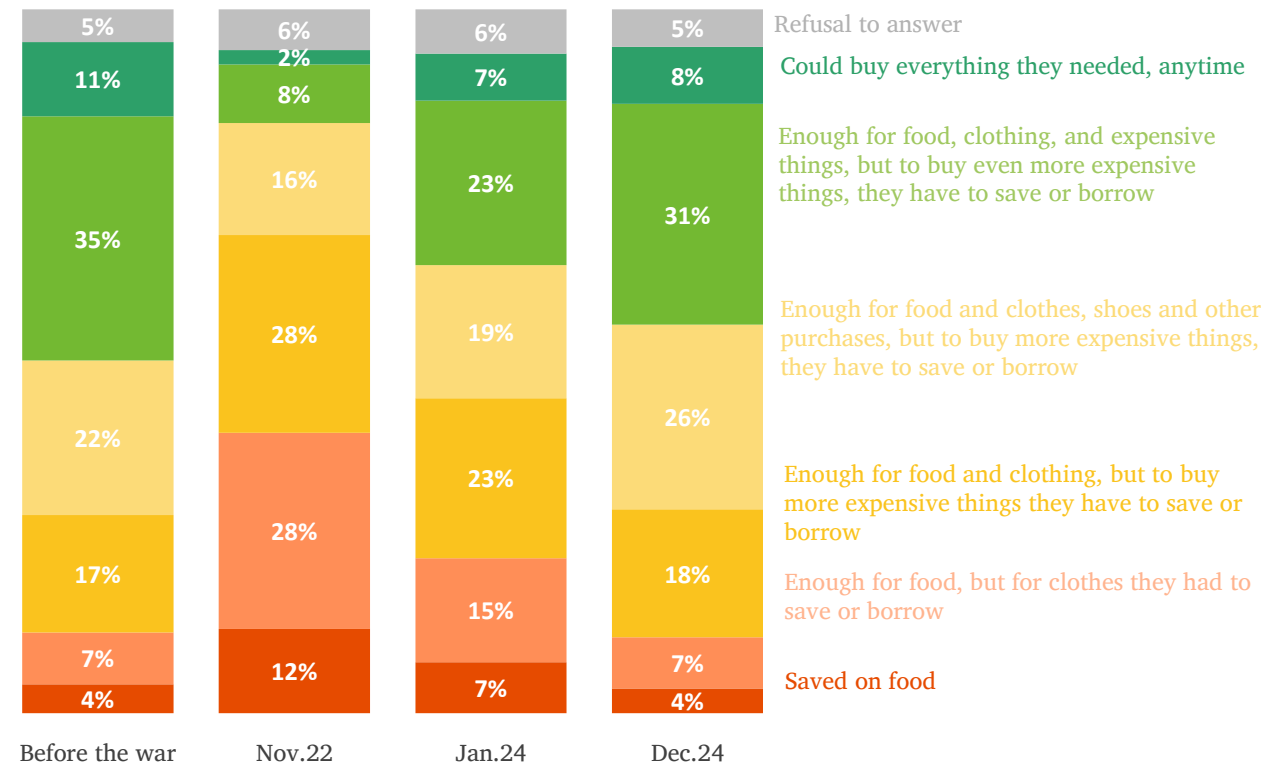


ECONOMIC SITUATION

Economic situation of Ukrainian refugees improved

- The economic situation of Ukrainians abroad has improved: since January 2024, the share of those who had enough money only for food has decreased by 7.5 percentage points.
- Overall, there is a decline in poverty among refugees.
- This is explained, in particular, by higher employment rates and income growth.
- Since January 2024, the share of those involved in the labour market has increased from 45% to 56%. The share of those not looking for work is also decreasing.
- Already 39% are working in the same profession as before the full-scale invasion, although almost half are working in a different profession.

Ukrainian refugees have improved their economic situation



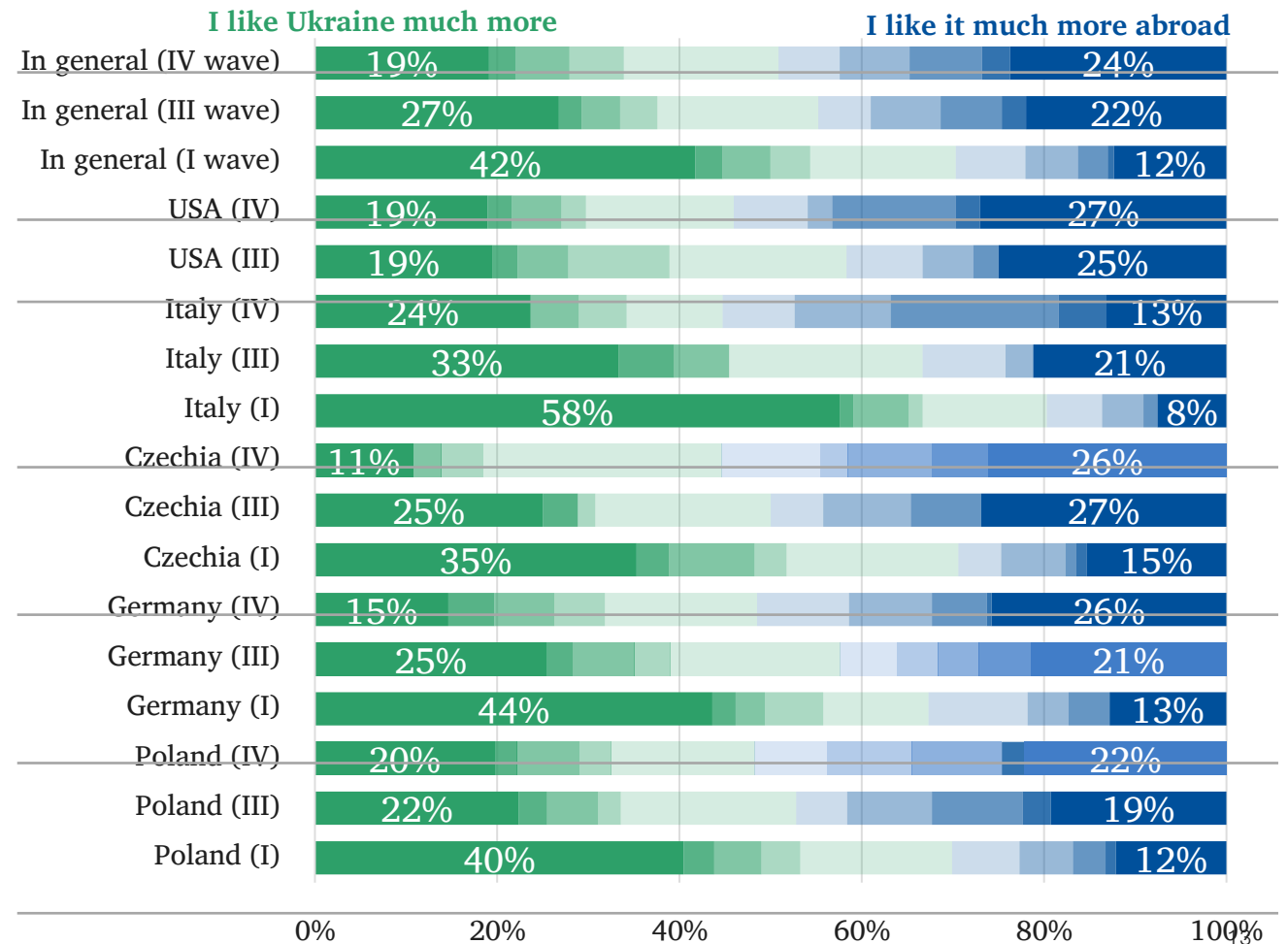
Source: Info Sapiens survey commissioned by CES

SOCIAL INTEGRATION

The level of adaptation of Ukrainian refugees is growing, with an increasing proportion enjoy living abroad

- As expected, a longer stay abroad is accompanied by adaptation to a new life.
- An increasing proportion of refugees report that they like it better abroad than in Ukraine. Almost half of the respondents have categorical views on this issue and chose extreme options.
- The level of support from local residents remains high. Refugees in the United States, Canada, and the United Kingdom report the most positive attitudes towards them.
- In 2024, the share of Ukrainians with friends among locals remained the same at 63%. At the same time, almost a third of refugees still do not have good friends among locals.

Everywhere is good, but at home is better? The share of those who think so has fallen
Comparison of the results of the I (November 2022), III (January 2024) and IV (December 2024) survey waves.



Source: Info Sapiens polls commissioned by CES

EMPLOYMENT ABROAD

Assessing the loss of labour force

- We estimate that about **2.5 million** (68%) **refugees were active** in the labour market before the full-scale war.
- Among them, about **265,000 refugees** were labour migrants in 2021.
- The difference between these numbers gives us an estimate of **the loss of active labour force - about 2.3 million people** (including about 570,000 refugees in Russia).

	Total adult refugees	Of which: worked before the war (68.2% of refugees)	Weighted average number of refugee labor migrants in 2021	Labor force loss
Abroad (excluding the Russian Federation and the Republic of Belarus)	2,775,158	1,892,658	198,418	1,694,240
Abroad (including the Russian Federation and the Republic of Belarus)	3,713,519	2,532,620	265,509	2,267,111

Source: Info Sapiens polls commissioned by CES



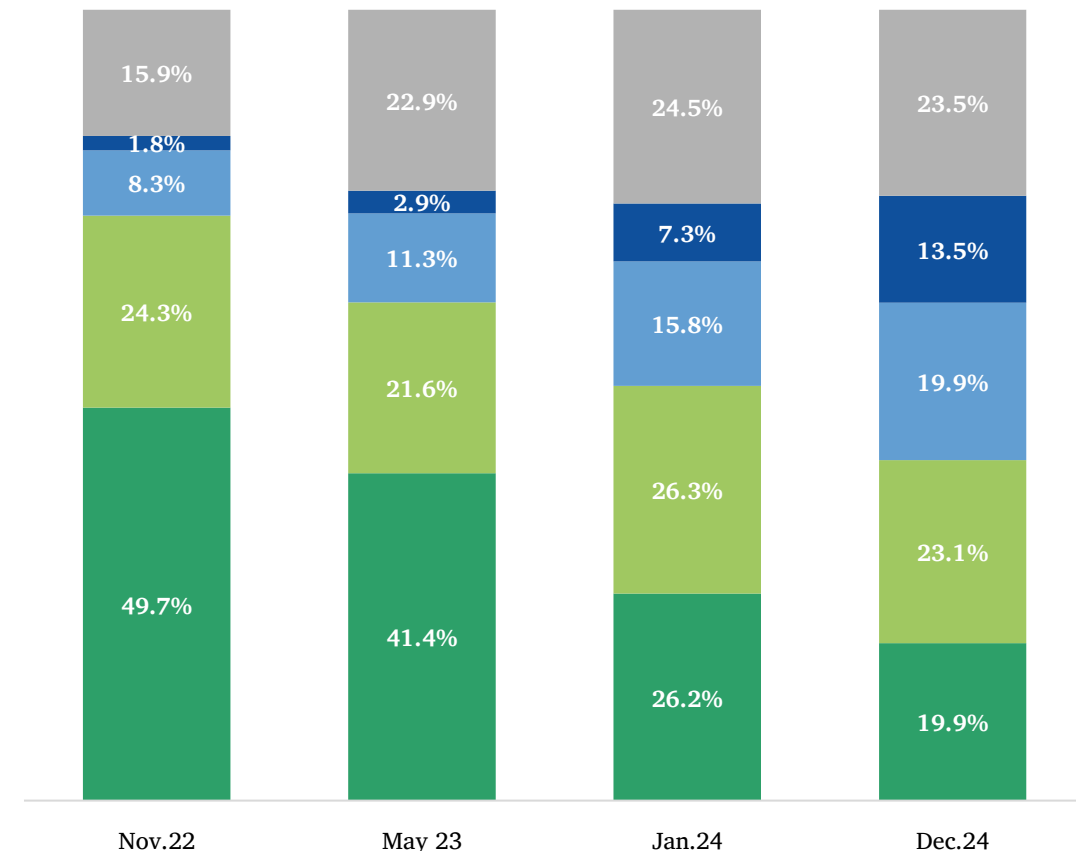
DO UKRAINIANS PLAN TO RETURN?

DO UKRAINIANS PLAN TO RETURN?

Plans of Ukrainian adults and young people to return to Ukraine

- Less than half of Ukrainians plan to return to Ukraine (20% definitely planning and 23% rather planning). 77% plan to do so after the war.
- The final end of the war / cessation of hostilities and air strikes, a higher standard of living in Ukraine, and the opportunity to find a well-paid job are factors that will encourage Ukrainian refugees to return to Ukraine.
- Only a small share of refugees (18%) are ready to return to other regions rather than their home region. The main factors that would stimulate return to a region other than their own.
- Compared to adults, the share of children who want to return to Ukraine is smaller: 13% definitely and 18% rather. Children aged 6-10 years old and those studying in Ukrainian schools are the most willing to do so.

The share of those who definitely plan to return decreased by 6 p.p. in 2024



Source: Info Sapiens polls commissioned by CES



REFUGEE GROUPS

REFUGEE GROUPS

Based on the results of the cluster analysis, 4 refugee groups were identified.

1. Patriotic — 28%

- 86% definitely or rather want to return (43% of all)
- 64% have travelled to Ukraine since leaving and are more optimistic about the end of the war
- 62% do not receive any assistance, 38% have no friends among locals
- Less likely to live in Germany, more likely to live in Poland

REFUGEE GROUPS

2. Quasi-labour migrants — 24%

- 73% compared to 47% of all refugees are employed
- Only 13% of them definitely or rather plan to return to Ukraine
- 51% of men (38% among all)
- More likely to live in Poland, less likely to live in Germany
- Younger compared to other groups, less likely to have children



REFUGEE GROUPS

3. Classical refugees — 22%

- 54% of them left between 24 February and the end of March 2022, more middle-aged women
- Only 8% are not receiving assistance (compared to 37% of all)
- Most changed their minds about returning (towards non-return)
- Most integrated into the life of the current host country



REFUGEE GROUPS

4. People from war zone — 26%

- More likely to come from Kharkiv (18%) and Donetsk (17%) regions
- Left mainly because of the hostilities
- More likely to live in Germany, less likely to live in Poland, and receive more assistance
- Older and poorer than other groups



REGRESSION ANALYSIS

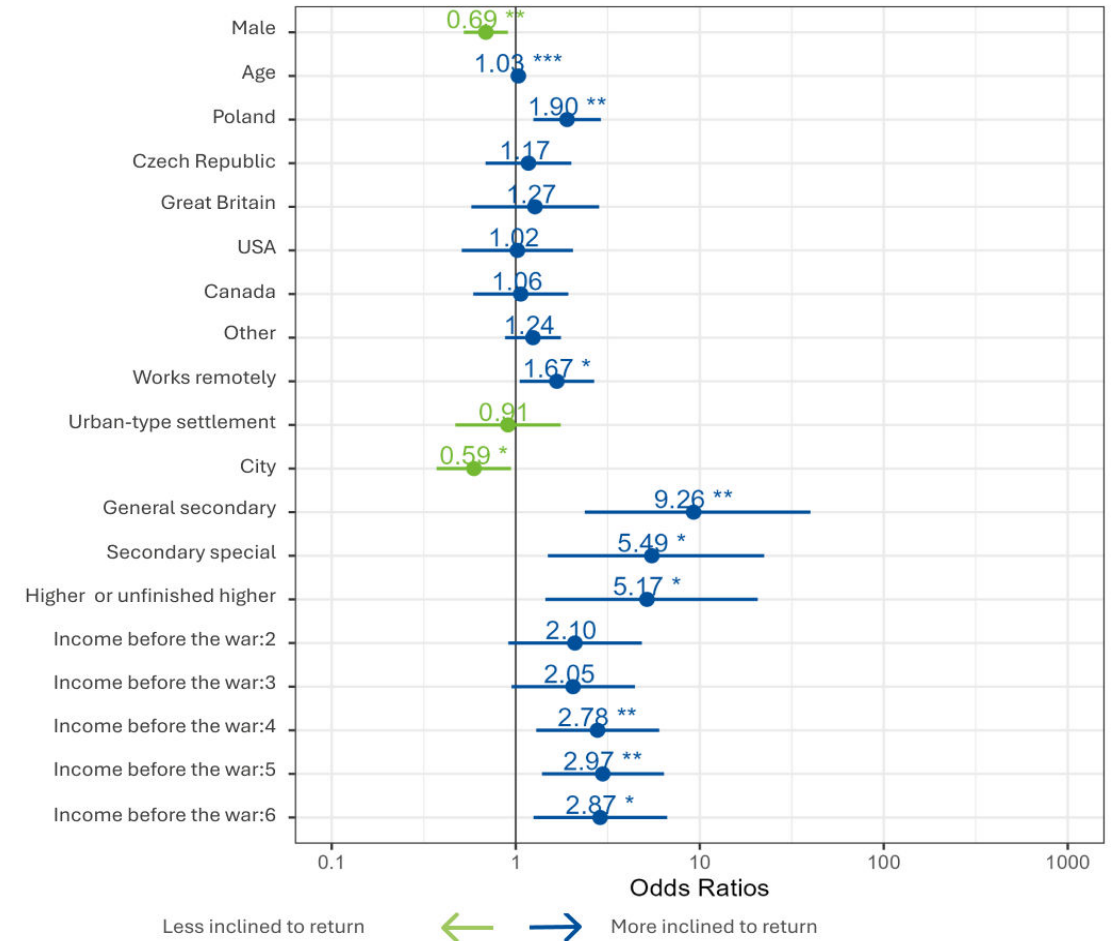


REGRESSION ANALYSIS

Factors that correlate with the desire of Ukrainians to return

- Women are 31% more likely to want to return to Ukraine than men.
- Older people are more likely to return to Ukraine: if a person is 1 year older, it increases the likelihood of returning by 3%.
- Ukrainians who are still working remotely for a Ukrainian company are 67% more likely to return than those who are neither working nor looking for a job.
- Ukrainians currently living in Poland are 90% more likely to want to return than Ukrainians in Germany.
- The size of the settlement in which refugees lived before the war is negatively correlated with the desire to return: people who left cities are 41% less likely to want to return than those who left villages.
- The higher the level of pre-war income, the more refugees want to return: those with above-average income are almost 3 times more likely to return than those with the lowest income.

Results of the regression analysis





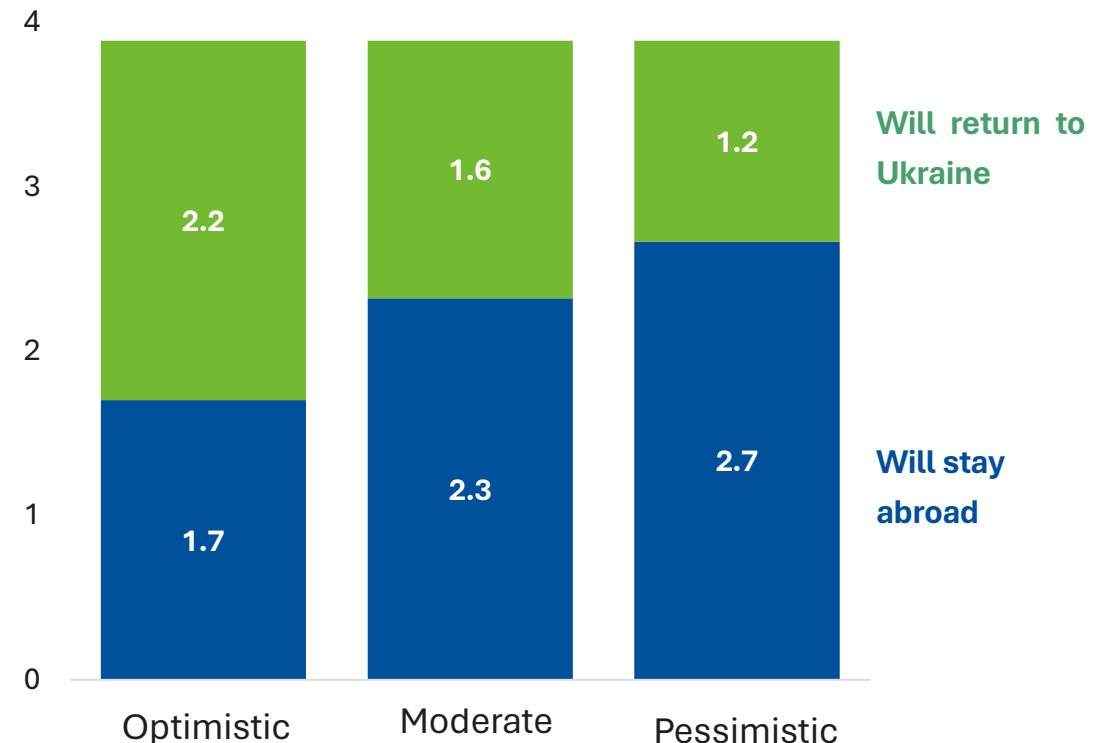
HOW MANY REFUGEES WILL RETURN? IMPACT ON THE ECONOMY AND DEMOGRAPHIC LOSSES

HOW MANY REFUGEES WILL RETURN AND HOW MANY WILL LEAVE?

We estimate the return of refugees in three scenarios

- We estimate the number of refugees who will return and stay abroad in three scenarios: optimistic, moderate and pessimistic.
- According to our calculations, after the end of the war, a total of 1.7 million Ukrainians will remain abroad in the optimistic scenario, 2.3 million in the moderate scenario, and 2.7 million in the pessimistic scenario.
- Thus, 2.2 million Ukrainians will return to Ukraine in the optimistic scenario, 1.6 million in moderate, and 1.2 million in the pessimistic scenario.
- According to our estimates, 290,000 Ukrainians may additionally move abroad under the optimistic scenario, 389,000 under the moderate scenario, and 532,000 under the pessimistic scenario.

Number of Ukrainians who will stay abroad and who will return to Ukraine, under different scenarios, million persons



Source: CES calculations based on Info Sapiens survey

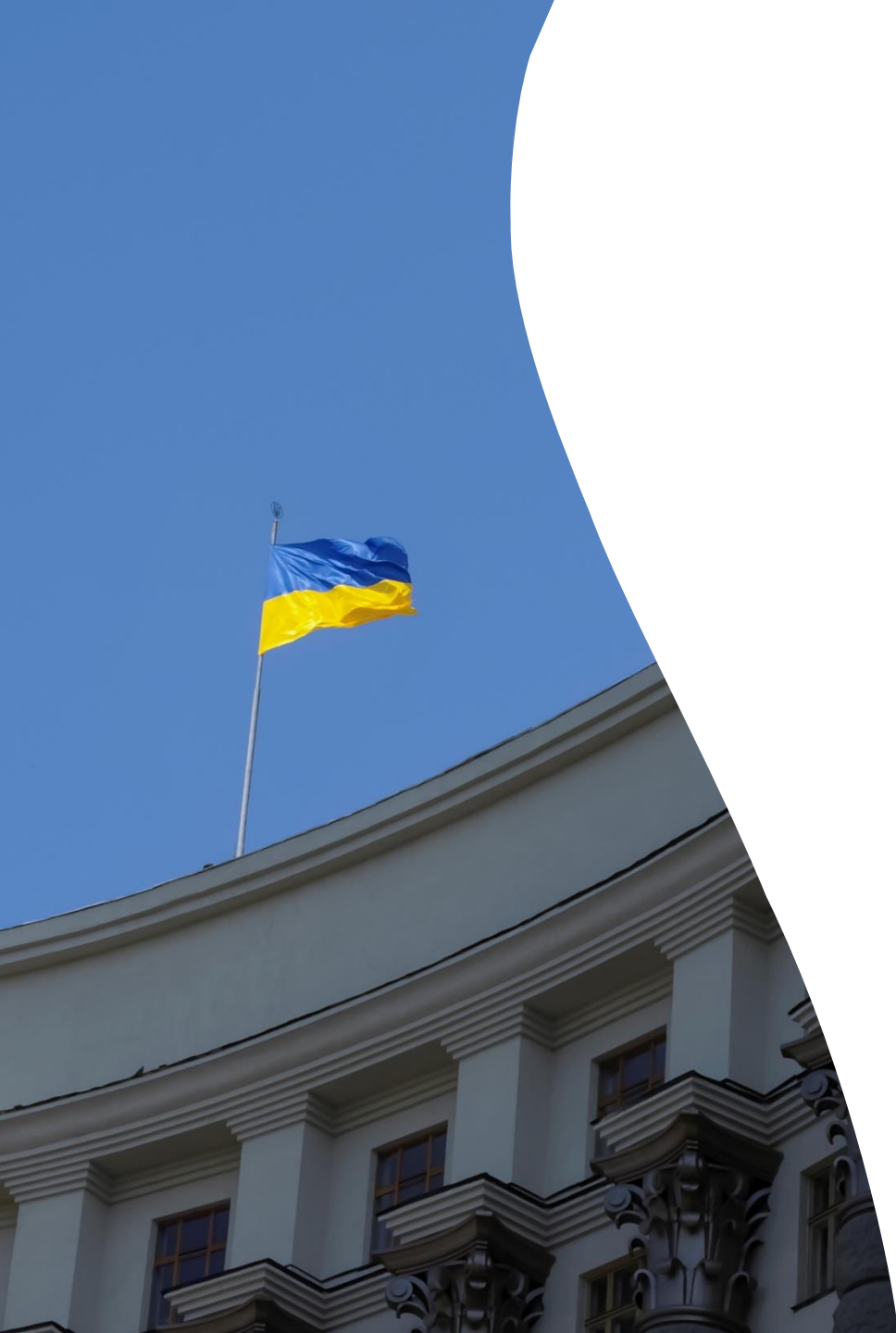
IMPACT ON THE ECONOMY AND DEMOGRAPHIC LOSSES

Economic and demographic losses from non-return of refugees

- The economic losses of not returning refugees will include reduced consumption in Ukraine and reduced production.
- The total losses for Ukraine's economy would be 5.1% of pre-war GDP in the optimistic scenario, 6.8% in the moderate scenario, and 7.8% in the pessimistic scenario.
- Demographic losses: The number of children and middle-aged women has decreased the most. About 18% of Ukrainian children aged 0-9 are now abroad.
- The 10-19 age group has also suffered large losses: 17% of girls and 23% of boys of this age are currently abroad.
- Among adults, the number of women aged 20-49 has decreased the most: 13% of women aged 20-29 and 19% of women in both age groups have moved abroad: 30-39 and 40-49.

	Optimistic	Moderate	Pessimistic
Consumer losses (% of pre-war GDP)	1,91%	2,60%	2,98%
Labor force losses (% of pre-war GDP)	3,23%	4,23%	4,77%
Total economic losses (% of pre-war GDP)	5,14%	6,83%	7,75%

RECOMMENDATIONS



RECOMMENDATIONS

How to encourage Ukrainian refugees to return to Ukraine?

- **Cooperation with EU countries in the return of Ukrainians after the war:** Ukraine needs to convey to its European partners that helping Ukraine return refugees after the war will be a great support for the country.
- **Rapid post-war reconstruction of the affected regions:** To ensure that Ukrainians from the war-affected regions have a place to return to, the destroyed regions must be rebuilt quickly.
- **While the reconstruction is underway, provide assistance to people from the affected and occupied regions:** this could include financial payments, housing or rental subsidies in regions of Ukraine that have not been destroyed by the war.
- **Compensation for destroyed housing:** the government should expand the programme of housing certificates for IDPs, attracting international funding and creating a single digital system for transparent distribution of funds.
- **Development of public-private partnership mechanisms:** to ensure that investors are willing to invest in the Ukrainian economy without fear of difficulties in finding labour, the state can build residential buildings for potential employees.

RECOMMENDATIONS

How to encourage Ukrainian refugees to return to Ukraine?

- Assistance in finding a job in a safer region, retraining courses.
- Increase resources for communication with compatriots abroad through diplomatic missions: organise regular meetings, consultations and information seminars for Ukrainian citizens who have left Ukraine.
- Simplified reintegration of children into Ukrainian schools: When Ukrainian children return to Ukraine, the subjects they have studied abroad should be credited and they should be re-enrolled in schools without additional exams.
- Simplified entry of Ukrainian graduates of foreign schools to Ukrainian higher education institutions.
- Granting Ukrainian refugees freedom of movement and choice of residence, similar to EU citizens: this will allow refugees to return without fear of losing their benefits or the right to reside abroad.



SUMMARY

REFUGEES FROM UKRAINE: WHO THEY ARE, HOW MANY AND HOW TO RETURN THEM. MAIN

- According to our estimates, as of the end of November 2024, **5.2 million Ukrainians** are abroad because of the war. The vast **majority of refugees are adult women (44%) and children (29%)**. The largest gender and age group is women aged 35-44 (13%).
- As of November 2024, the largest share of Ukrainian refugees in Europe is in Germany (27%) and Poland (23%). Outside of Europe, the largest countries in terms of the number of Ukrainians accepted since the beginning of the full-scale invasion are the United States (187,000), the United Kingdom (253,500) and Canada (298,100).
- The legal status of Ukrainian refugees in Europe and beyond: many countries are gradually **reducing spending** on refugees and making conditions for them stricter than at the beginning of the full-scale invasion.
- The future of temporary protection status: the most optimal scenario is **to grant Ukrainians freedom of movement and choice of residence, similar to EU citizens**.
- According to our estimates, **between 1.7 and 2.7 million Ukrainians** may remain outside Ukraine under different scenarios.
- **Total losses for the Ukrainian economy** would amount to 5.1% of pre-war GDP in the optimistic scenario, 6.8% in the moderate scenario, and 7.8% in the pessimistic scenario.



THANK YOU FOR YOUR ATTENTION!