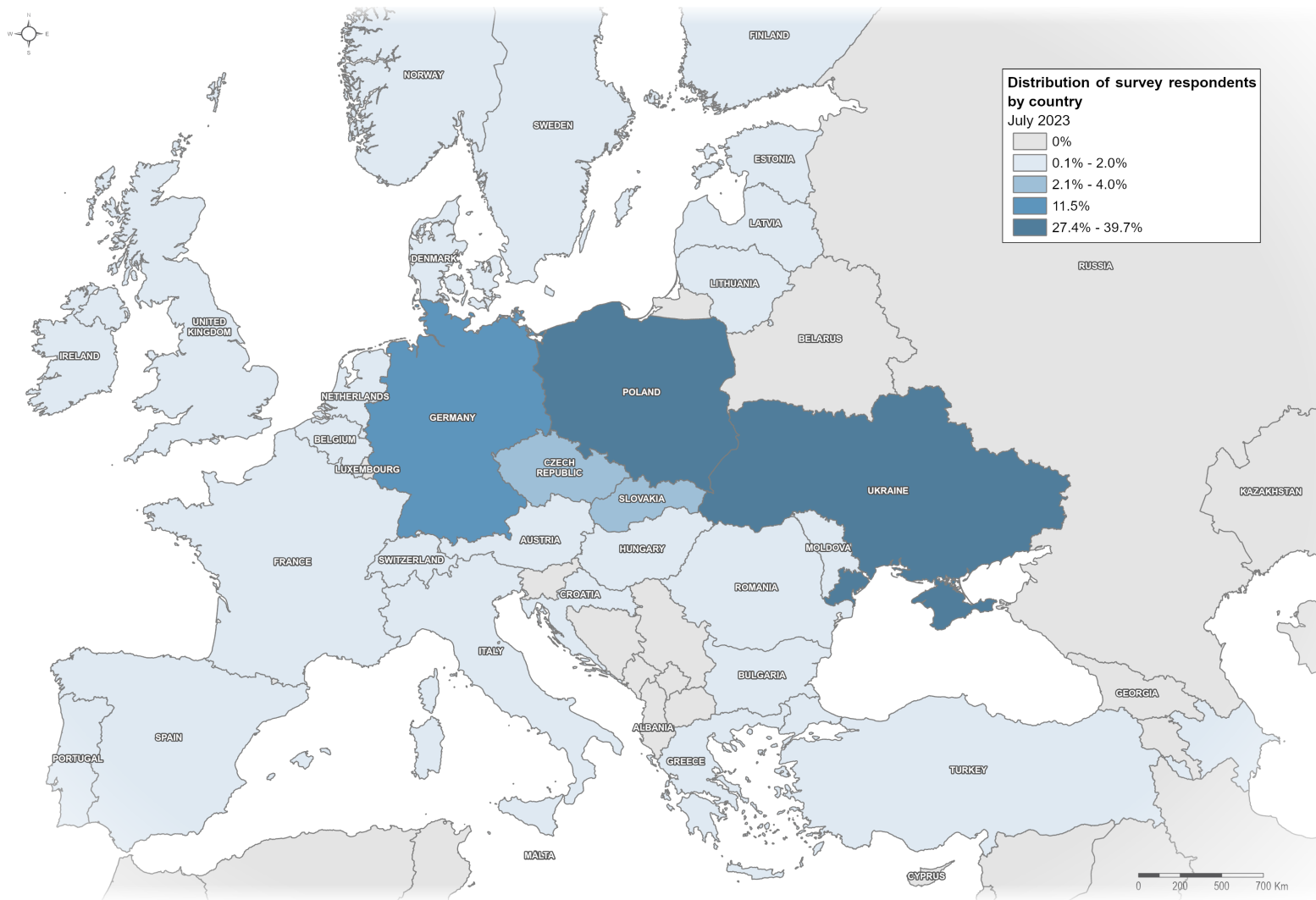


# Ukraine Longitudinal Survey

## Round 15

July 2023



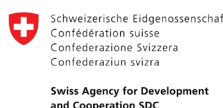
## ABOUT

Since March 2022, IMPACT has been conducting a monthly longitudinal survey of people who fled the escalation of hostilities in Ukraine to understand their mobility patterns, needs, integration trajectories, intentions to return, and how these change over time. Respondents were initially identified through convenience sampling among people who have crossed the border from Ukraine and were interviewed through a data collection initiative since 28 February 2022 in Poland, Slovakia, Hungary, Romania, and Moldova at the border crossings, transit sites, and reception centres, in partnership with UNHCR. From October 2022 onwards, IMPACT began to complement the existing sample through Viber and Facebook dissemination campaigns. Once respondents give consent, they are 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 IMPACT's 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 5,447 phone interviews conducted remotely between 12 July 2023 and 3 August 2023, during Round 15 of the Longitudinal Survey of Ukraine Refugees and Returnees. The reference point for comparison is the 14th round, which took place from 7 June 2023 to 29 June 2023.

In light of the continued war in Ukraine, this factsheet provides a snapshot update, as well as the changes from the previous round, concerning the experiences and situation of those who have been displaced from Ukraine and remain abroad (refugees) or have returned (returnees). In order to better understand the situation specific to refugees and cross-border returnees, and the differences between them, the analysis presented below is divided into two sections exploring the situation of respondents abroad and respondents back in Ukraine.

Round 15 of the longitudinal survey has been funded by the International Federation of Red Cross and the Ukrainian Red Cross.



**IMPACT** Shaping practices  
Influencing policies  
Impacting lives

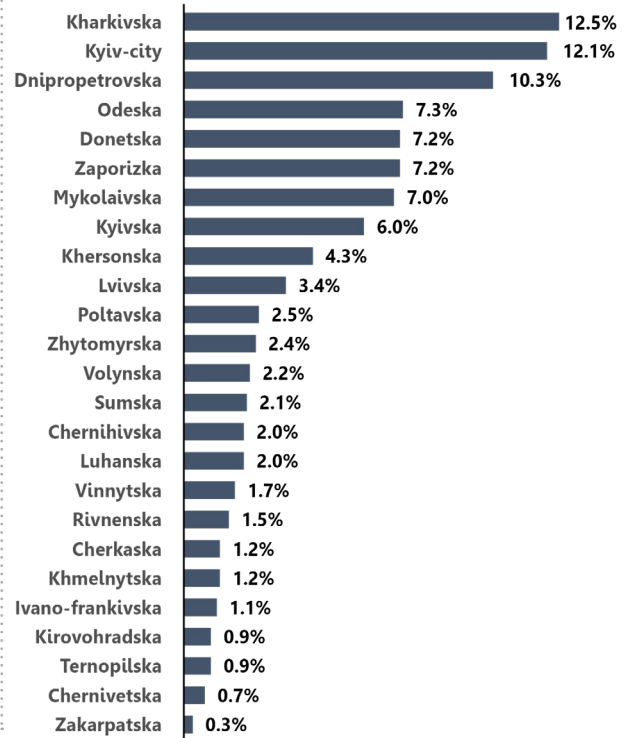
# 1. SAMPLE DEMOGRAPHICS

During the last five days of February 2022, when the invasion had started, almost 14% of assessed households left Ukraine, and half of the sample (53.6%) were displaced in March 2022. Overall, nearly 90% of those surveyed in Round 15 left the country between the end of February and May 2022.

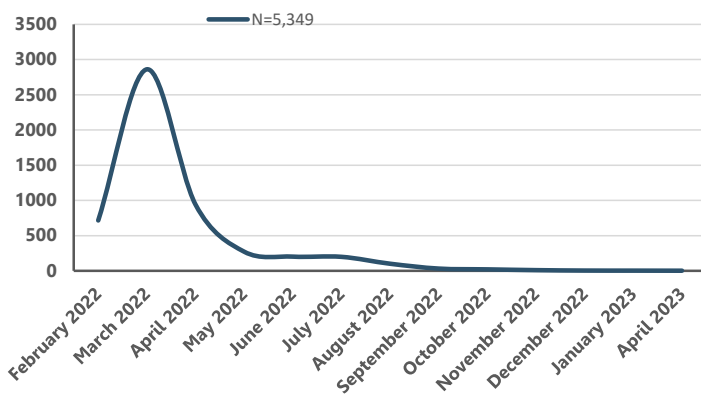
Most of the respondents left from areas directly affected by the war (62.4%): Kharkivska oblast (12.5%), Kyiv city (12.1%), Donetsk oblast (7.2%), Zaporizka oblast (7.2%), Mykolaivska (7%), Kyivska (6%), Khersonska (4.3%), Sumska (2.1%), Chernihivska (2%) and Luhanska (2%). Other oblasts of origin for a considerable number of respondents characterized by high population density were: Dnipropetrovska oblast (10.3%), and Odeska oblast (7.3%).

## Distribution of respondents by oblast of origin

July 2023 (N=5,442)



The month of leaving Ukraine



# 2. REFUGEES' SITUATION

## 2.1. DEMOGRAPHICS

In July, 56% of refugee households had two or three members. Nearly 69% of all the households surveyed included children, and most of these households had either one or two children.

Among refugee households, 96.2% reported the same number of household members as indicated previously. Among the remaining 3.8%, equivalent to 123 households, 36.2% experienced household members moving into or out of Ukraine while the respondent remained at the same location abroad. Additionally, one-third of refugee households' displacement (33.8%) was attributed to the respondent's movements within the current foreign country or between others. This included 25% where the respondent moved without the entire household and 8.6% where all members moved to reunite with others.

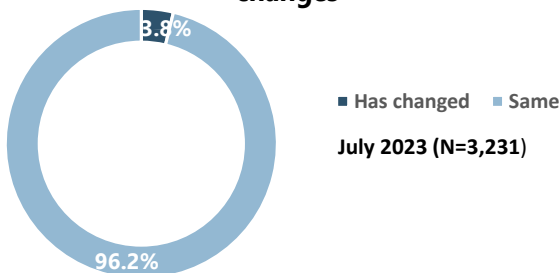


2.8 is the average household size



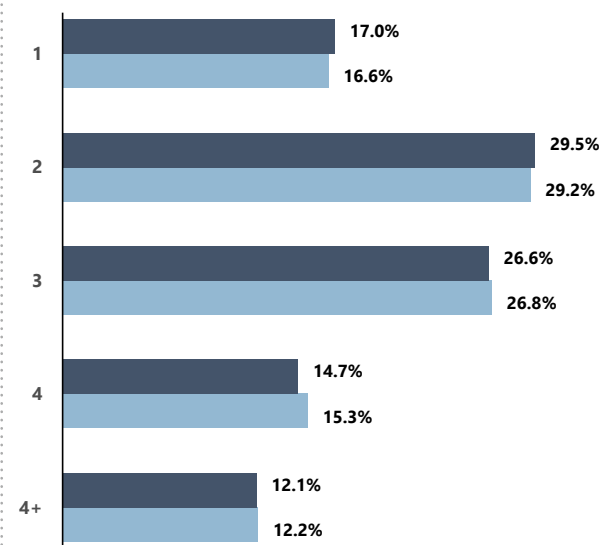
1.2 is the average number of children

Refugees' household composition changes

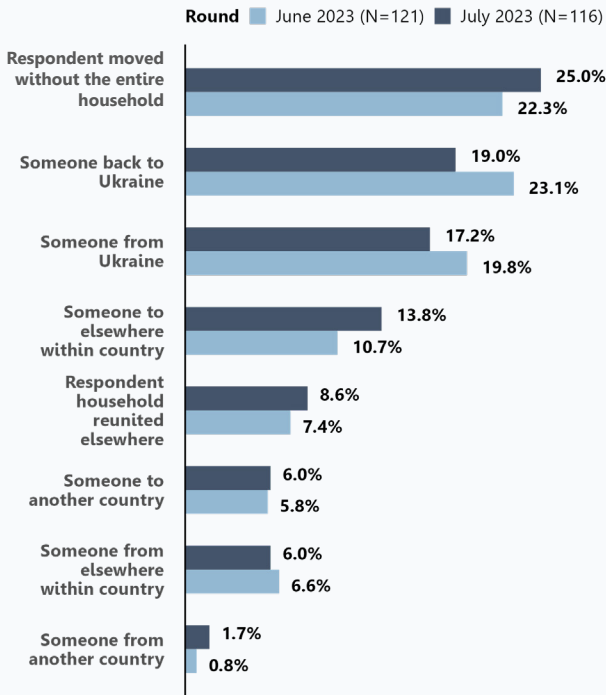


Refugee respondents' household size

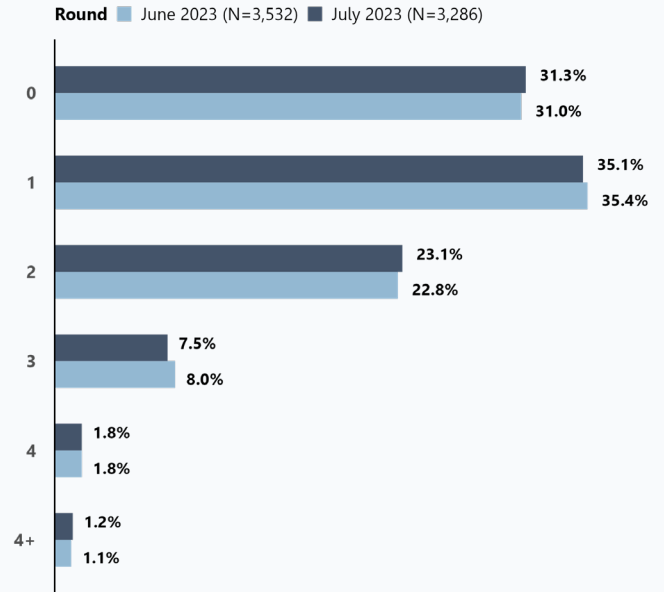
Round June 2023 (N=3,532) July 2023 (N=3,286)



**Reasons of refugee households' composition changes**



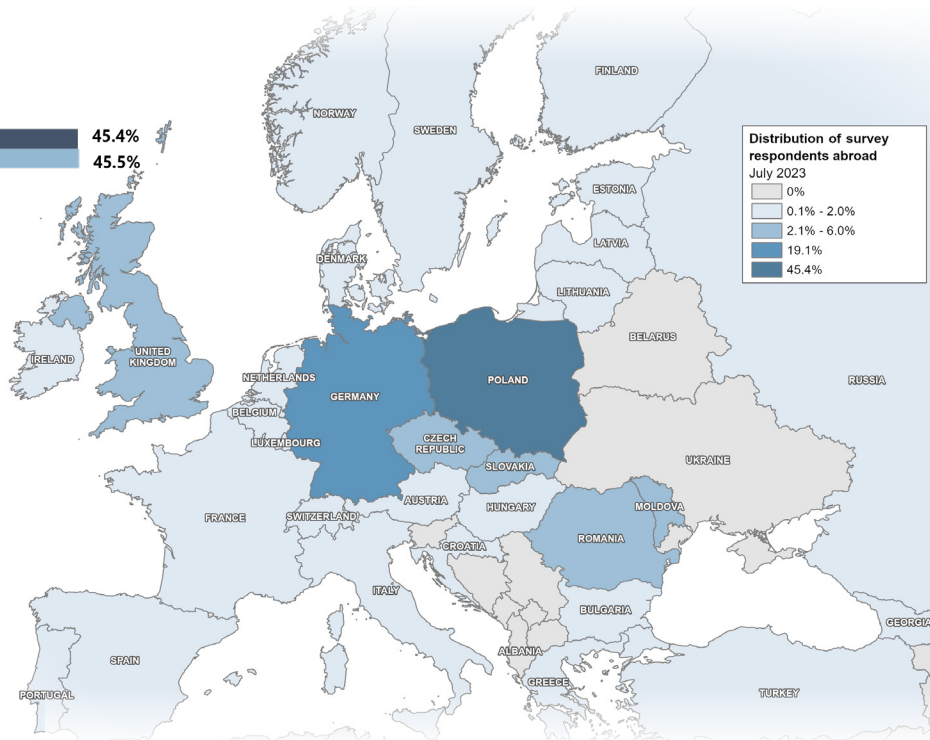
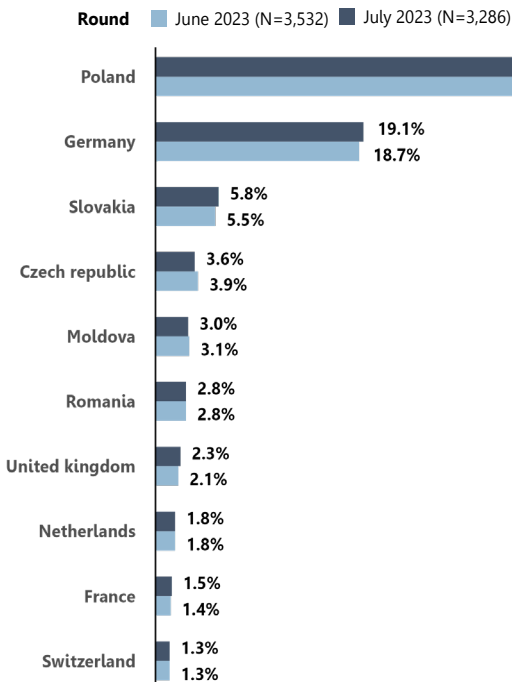
**Refugee households' number of children**



**2.2. GEOGRAPHICAL DISTRIBUTION**

In July, Poland and Germany remained the primary host countries, accommodating 45.4% and 19.1% of the respondents, respectively. Further down the list were Slovakia (5.8%), the Czech Republic (3.6%), Moldova (3%), and Romania (2.8%). Over half of all respondents (58%) assessed in host countries were located in bordering countries surrounding Ukraine.

**Refugee respondents' host country (top 10)**



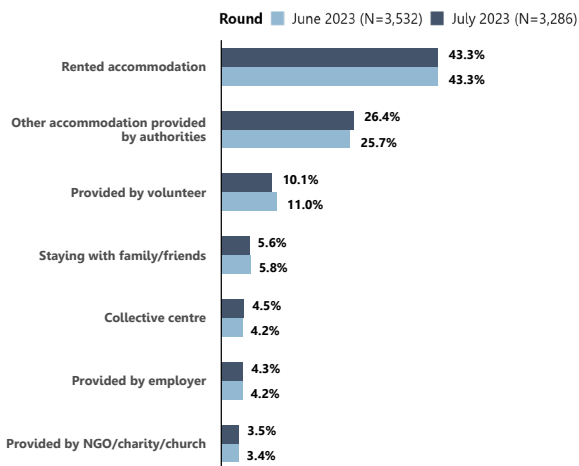
## 2.3. ACCOMMODATION

As of July, 43.3% of respondents living abroad were residing in rented accommodations. The majority of such households (97.7%) reported paying the full cost of rent. Roughly a quarter of refugee respondents (26.4%) reported residing in accommodation provided by authorities. Of those, over half (58%) were not required to pay for housing, while 21.9% contributed towards utilities, and 18.3% paid a subsidized rate. Additionally, 10.1% of refugee respondents reported having stayed in housing provided by volunteers. Among these respondents, about 62% stayed

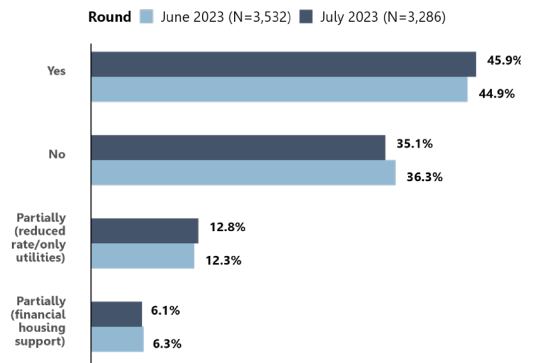
at no cost, 30.2% paid a reduced rate or only paid utilities, and 5.1% received public housing support. In collective centers (4.5%) and NGO-provided housing (3.5%), almost all households reported not paying for rent, with rates of 91.2% and 86.8%, respectively.

Overall, nearly 46% of respondents abroad paid the full price of rent regardless of their type of accommodation, 35.1% did not have any expenses, 12.8% paid only utilities or at a reduced price, and 6.1% received some form of public housing assistance to help mitigate the cost of living.

Refugees' accommodation (top 7)



Refugees' rent payment

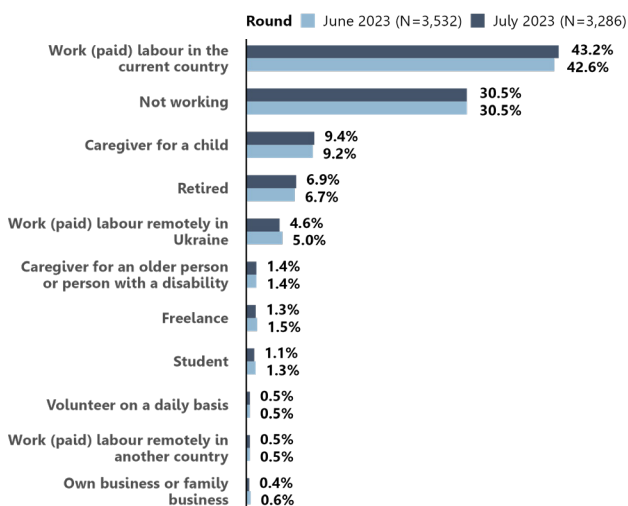


## 2.4. OCCUPATION

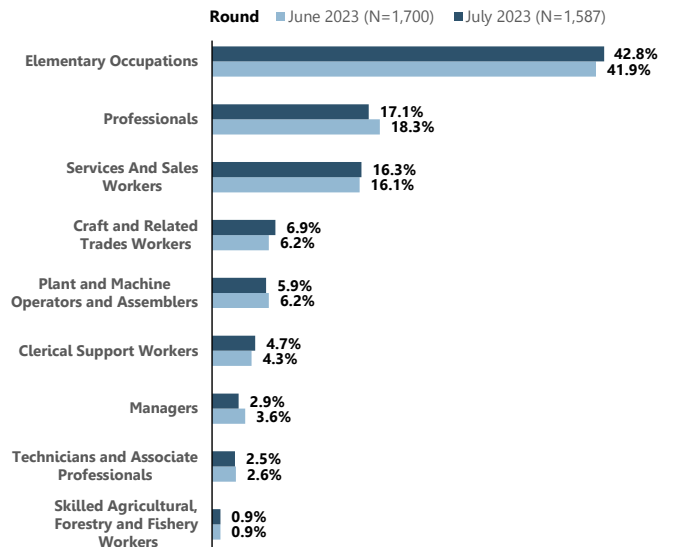
The proportion of refugees engaged in paid daily labour in their host country was 43.2% in July. The number of unemployed respondents remained at 30.5% in July. The role of being a primary caregiver for a child remained almost at the same level of prevalence as in the previous round — 9.4% in July. Other forms of employment, including remote work, running a business, and freelancing, made up 6.8% of the employment opportunities for refugees in July. Of those, 4.6% were engaged in remote work based in Ukraine. Additionally, 6.9% of respondents reported being retired, and 1.4% were caregivers for older persons (65+ years) or

people with disabilities. Based on the International Standard Classification of Occupations (ISCO-08)<sup>2</sup>, findings show that employment categories remained relatively stable over both survey rounds. In July, the largest employment group was those in elementary occupations, comprising 42.8% of working-age respondents. Professionals made up the second-largest category at 17.1%, followed by sales and service workers at 16.3%. Occupations with the least representation included managerial roles at 2.9%, technicians and associate professionals at 2.5%, and skilled agricultural, forestry, and fishery workers at 0.9%.

Refugees' occupation



Refugees' current employment

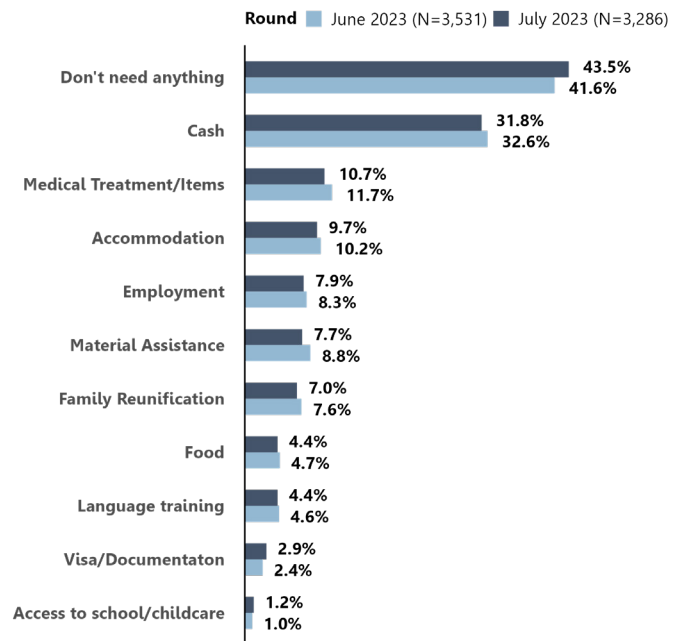


## 2.5. NEEDS AND ASSISTANCE

As of July, the proportion of respondents with no needs slightly rose from 41.6% in June to 43.5% in July. The top three urgent needs were financial assistance (31.8%), medical care (10.7%), and accommodation (9.7%). Of the top six countries hosting refugees in July, Germany had the highest percentage of households reporting no urgent needs (54.8%), while Romanian households had the lowest figure — 34.4%. Among those surveyed in Romania, the top three urgent needs were financial assistance mentioned by almost half (48.4%) of respondents, medical care reported by 12.9% of refugees, and 11.8% of those surveyed expressed a need for job opportunities.

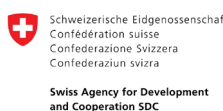
Households with individuals with disabilities and those with pregnant or lactating women reported higher unmet needs compared to the overall refugee rate (56.5%), with differences of 5.2 and 3.7 percentage points, respectively. Conversely, respondents who were 65 years or older reported 5.3 percentage points less urgent needs. No significant difference was observed for households with children compared to the overall figure.

Refugees' top 10 urgent unmet needs



Urgent needs of refugees in the top 6 countries of residence (Round 15: July 2023)

URGENT NEEDS	POLAND	GERMANY	SLOVAKIA	CZECHIA	MOLDOVA	ROMANIA
CASH	39.4%	17.1%	34.7%	40.2%	39.2%	48.4%
MEDICAL TREATMENT/ITEMS	11.6%	8.9%	13.7%	10.3%	18.6%	12.9%
MATERIAL ASSISTANCE	9.7%	3.4%	7.9%	6.8%	8.2%	9.7%
ACCOMMODATION	11.1%	7.7%	8.4%	12.8%	6.2%	8.6%
EMPLOYMENT	7.5%	6.7%	9.5%	11.1%	4.1%	11.8%
FAMILY REUNIFICATION	7.3%	6.5%	5.8%	5.1%	9.3%	3.2%
FOOD	5.0%	1.6%	6.3%	4.3%	5.2%	9.7%
LANGUAGE TRAINING	3.2%	7.5%	2.1%	3.4%	2.1%	5.4%
VISA/DOCUMENTATION	2.3%	4.2%	1.1%	2.6%	4.1%	0.0%
ACCESS TO SCHOOL/CHILDCARE	1.5%	1.4%	2.1%	1.7%	0.0%	0.0%
INFORMATION ABOUT SERVICES	1.0%	1.9%	1.1%	0.9%	0.0%	0.0%
LEGAL ADVICE	0.9%	1.1%	2.1%	0.9%	2.1%	1.1%
EDUCATION	1.0%	1.0%	0.5%	0.9%	1.0%	2.2%
PSYCHOSOCIAL SUPPORT	0.9%	0.8%	0.0%	1.7%	0.0%	0.0%
TRANSPORTATION	0.4%	1.6%	0.5%	0.9%	0.0%	0.0%
OTHER	0.8%	1.0%	0.5%	2.6%	0.0%	1.1%
REPAIR OF DAMAGED HOUSE/APARTMENT	0.5%	0.2%	0.0%	0.0%	1.0%	1.1%
SUPPLY OF UTILITIES	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
A WAY TO CONTACT MY FAMILY	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SAMPLE SIZE	N=1,491	N=626	N=190	N=117	N=97	N=93



## Urgent needs of refugees by population groups (Round 15: July 2023)

URGENT NEEDS	HOUSEHOLDS WITH CHILDREN	HOUSEHOLDS WITH PEOPLE WITH DISABILITIES	PERSONS 65 YEARS AND OLDER	HOUSEHOLDS WITH PREGNANT OR BREASTFEEDING WOMEN
CASH	32.1%	32.8%	30.6%	22.8%
MATERIAL ASSISTANCE	8.2%	10.0%	6.9%	10.6%
MEDICAL TREATMENT/ITEMS	9.8%	22.4%	20.0%	12.2%
ACCOMMODATION	9.7%	8.2%	6.2%	9.8%
EMPLOYMENT	7.7%	6.9%	1.9%	5.7%
FAMILY REUNIFICATION	7.4%	5.4%	3.8%	9.8%
FOOD	4.3%	3.9%	5.6%	5.7%
LANGUAGE TRAINING	4.5%	3.9%	3.8%	4.1%
VISA/DOCUMENTATION	3.1%	3.3%	2.5%	6.5%
ACCESS TO SCHOOL/CHILDCARE	1.8%	1.1%	0.6%	3.3%
INFORMATION ABOUT SERVICES	1.3%	1.1%	1.2%	1.6%
EDUCATION	1.1%	0.7%	0.0%	0.0%
PSYCHOSOCIAL SUPPORT	0.9%	1.1%	0.6%	0.8%
LEGAL ADVICE	0.9%	2.6%	0.6%	0.8%
TRANSPORTATION	0.9%	0.6%	0.6%	0.8%
OTHER	0.9%	0.7%	0.0%	0.8%
REPAIR OF DAMAGED HOUSE/APARTMENT	0.3%	0.2%	1.2%	0.0%
A WAY TO CONTACT MY FAMILY	0.0%	0.0%	0.0%	0.0%
SUPPLY OF UTILITIES	0.0%	0.2%	0.0%	0.0%
SAMPLE SIZE	N=2,258	N=539	N=160	N=123

## 2.6. INTEGRATION

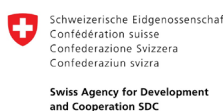
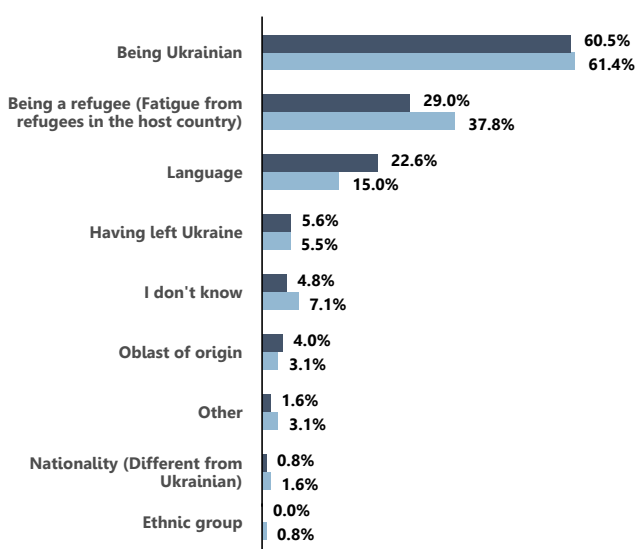
In July, only 3.8% of the households surveyed reported facing discrimination in their host country. Amongst them, the primary causes cited were either being Ukrainian (60.5%) or experiencing 'Fatigue from refugees in the host country' (29%). Considering all refugee respondents, 2.3% and 1.1% cited the above-mentioned reasons, respectively.

As of July, 53.7% of respondents rated their skills in the primary language of the host location as 'poor' or 'very poor' with no significant improvements compared to June. Around one-third of all respondents (34.3%) cited their proficiency as 'fair'. Only 12.1% of refugee respondents reported fluency in the host country's language, with 2.2% indicating a very good command and 9.9% describing it as good.

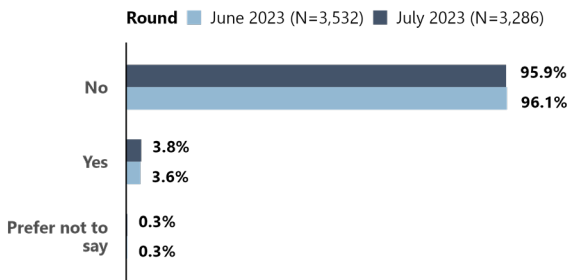
Roughly 31.6% of respondents were taking language classes at the time of the survey round. Among those, Germany had the highest rate of participation (61.3%), while Moldova had the lowest (9.3%).

## Refugees' perceived reasons for being discriminated

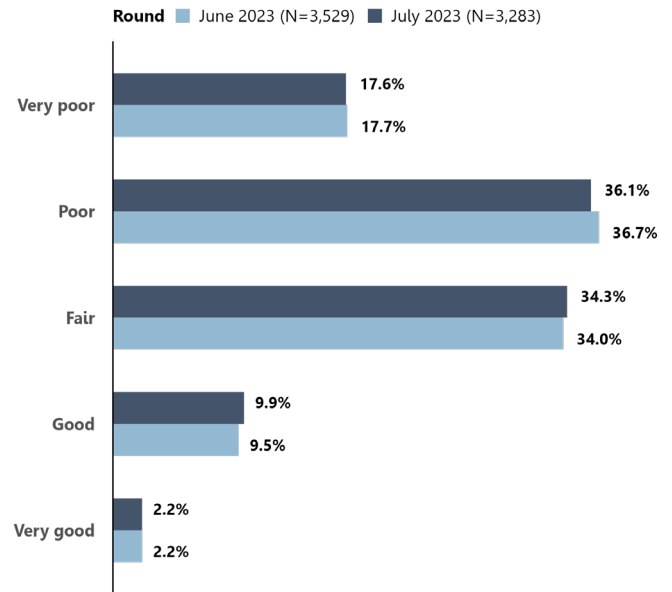
Round ■ June 2023 (N=127) ■ July 2023 (N=124)



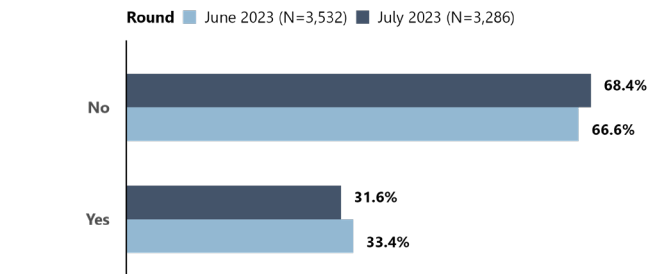
**Refugees' discrimination**



**Refugees' language skills**



**Refugees' language course attendance at the time of the survey**



**Language skills in the top 6 host countries (Round 15: July 2023)**

LANGUAGE SKILLS	POLAND	GERMANY	SLOVAKIA	CZECHIA	MOLDOVA	ROMANIA
VERY POOR	9.2%	24.0%	12.1%	14.5%	39.6%	38.7%
POOR	34.3%	38.8%	36.8%	41.9%	25.0%	41.9%
FAIR	41.8%	30.5%	38.4%	37.6%	11.5%	16.1%
GOOD	12.4%	5.4%	11.6%	6.0%	16.7%	1.1%
VERY GOOD	2.2%	1.3%	1.1%	0.0%	7.3%	2.2%
SAMPLE SIZE	N=1,489	N=626	N=190	N=117	N=96	N=93

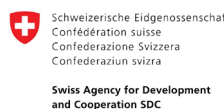
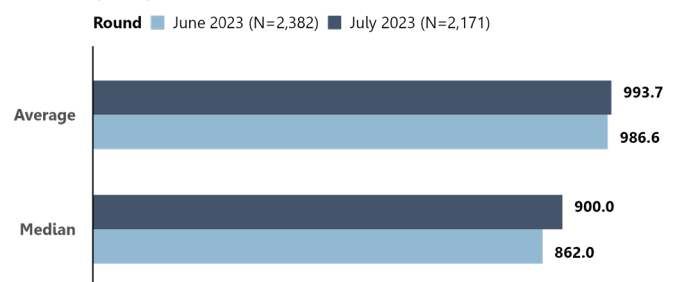
**Language courses attendance in the top 6 host countries at the time of data collection (Round 15: July 2023)**

LANGUAGE COURSES ATTENDANCE	POLAND	GERMANY	SLOVAKIA	CZECHIA	MOLDOVA	ROMANIA
NO	79.7%	38.7%	80.5%	77.8%	90.7%	87.1%
YES	20.3%	61.3%	19.5%	22.2%	9.3%	12.9%
SAMPLE SIZE	N=1,491	N=626	N=190	N=117	N=97	N=93

**2.7 INCOME**

As of July, the median income for typical refugee households consisting of 2.8 members on average, stood at 900 euros, while the average income was 994 euros. Among the top 6 host countries, Germany led with the highest average and median incomes, at 1,272 and 1,100 euros, respectively. Poland and the Czech Republic followed with a median income of 791 euros and 768 euros, respectively. Households in Moldova and Romania reported the lowest income levels. Based on the median income in July, Romanian households earned 505 euros, and Moldovan households earned 444 euros.

**Refugees' monthly household income (Euro)**



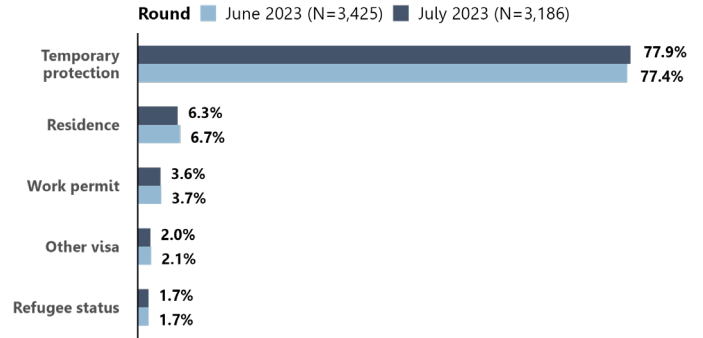
Household monthly income in the top 6 host countries, euro (Round 15: July 2023)

MONTHLY INCOME BY HOUSEHOLD	GERMANY	CZECHIA	POLAND	SLOVAKIA	ROMANIA	MOLDOVA
AVERAGE	1,272	867	826	755	570	503
MEDIAN	1,100	768	791	680	505	444
SAMPLE SIZE	513	77	967	106	35	58

## 2.8 DOCUMENTATION

Nearly all assessed refugees (97.6%) secured supplementary documents to extend their stay abroad. Over half were provided temporary protection — 77.9% as of July 2023. A smaller proportion, 6.3%, had various types of residence permits, while 3.6% possessed work visas/permits allowing them to stay, and a smaller proportion officially obtained refugee status (1.7%).

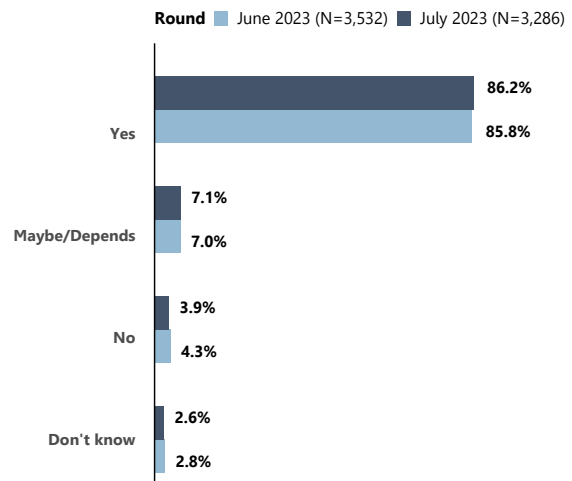
### Refugees' documentation type (top 5)



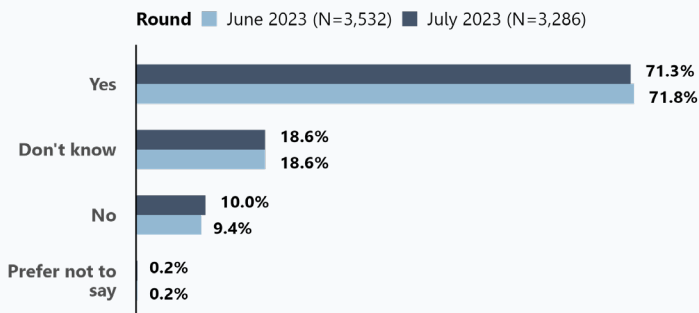
## 2.9 INTENTIONS

As for future intentions, the majority (86.2%) of refugee respondents planned to remain in their current location for at least the next three months. The smaller portion of respondents (9.7%) were uncertain about their plans reporting 'maybe/depends' or 'I don't know'. Concerning long-term plans, 71.3% expressed a desire to return to Ukraine eventually. Conversely, 18.6% were undecided about returning, and 10% had firmly decided not to return. A large majority (83.2%), indicated that they did not anticipate other family members or close relatives joining them abroad. About 10.5% were contemplating this option, and 6.1% already had plans in place for family reunification abroad.

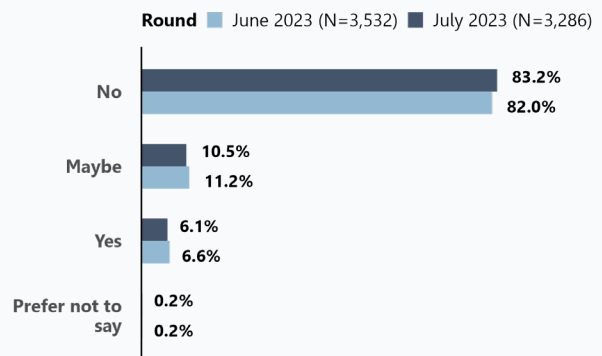
### Refugees' intentions to stay for 3 month in the current location



### Refugees' intentions to return to live in Ukraine any time in the future



### Intentions of family in Ukraine to join refugee in the current country in the future





### 3. RETURNEES' SITUATION

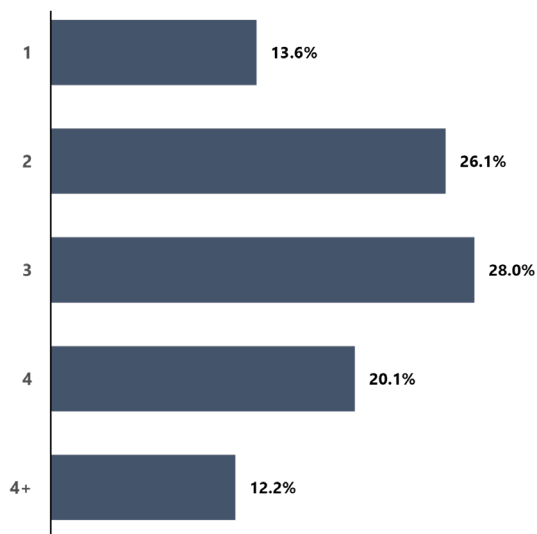
#### 3.1. DEMOGRAPHICS

Between June and July, no notable changes in household size or the number of children were observed. Returnee households continued to have fewer children than refugees (average of 1.1 compared to 1.2), but a slightly larger household size (3.0 compared to 2.8). In terms of the proportion of households with children, returnees had a slightly lower percentage (66.3%) compared to refugees (68.7%).

Households in Ukraine were more likely to have experienced changes in household composition when compared to those residing abroad, with 7.9% of Ukrainian households reporting changes in July compared to 3.8% of households abroad. Also, a decrease of 4.1 percentage points in returnee household members reporting movements elsewhere was observed in July compared to June's corresponding rate.

#### Returnee respondents' household size

July 2023 (N=2,161)

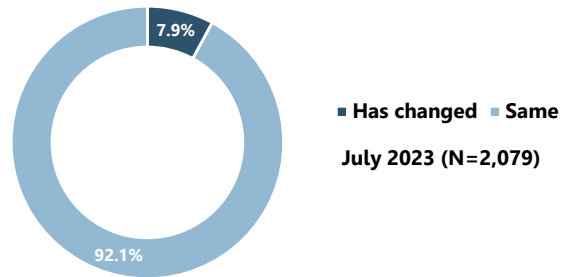


3.0 is the average household size



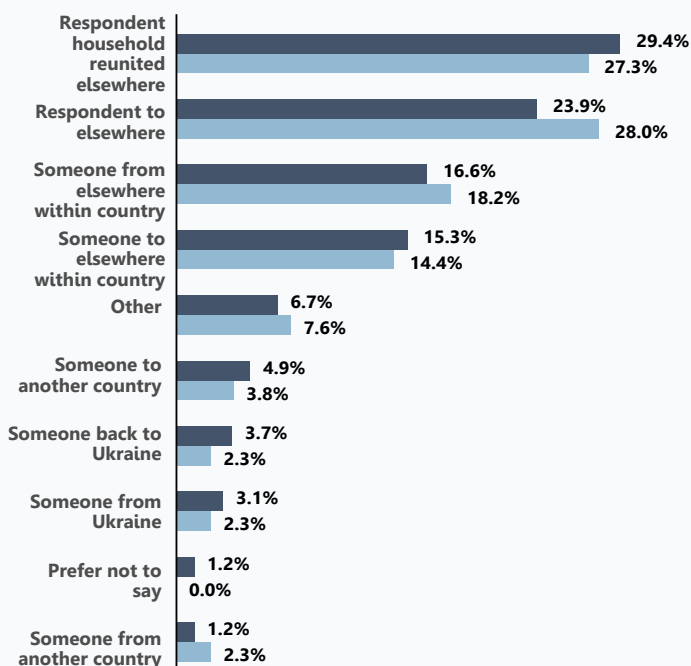
1.1 is the average number of children

#### Returnees' household composition changes



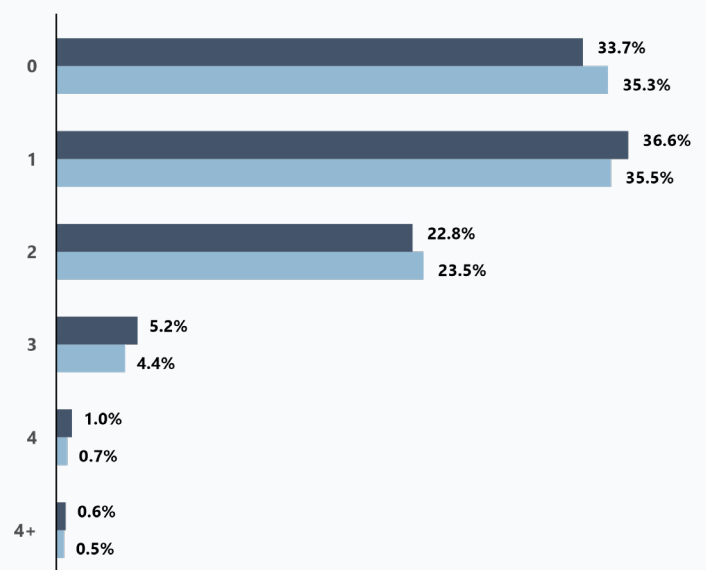
#### Reasons of returnee households' composition changes

Round June 2023 (N=132) July 2023 (N=163)



#### Returnee households' number of children

Round June 2023 (N=2,010) July 2023 (N=2,161)



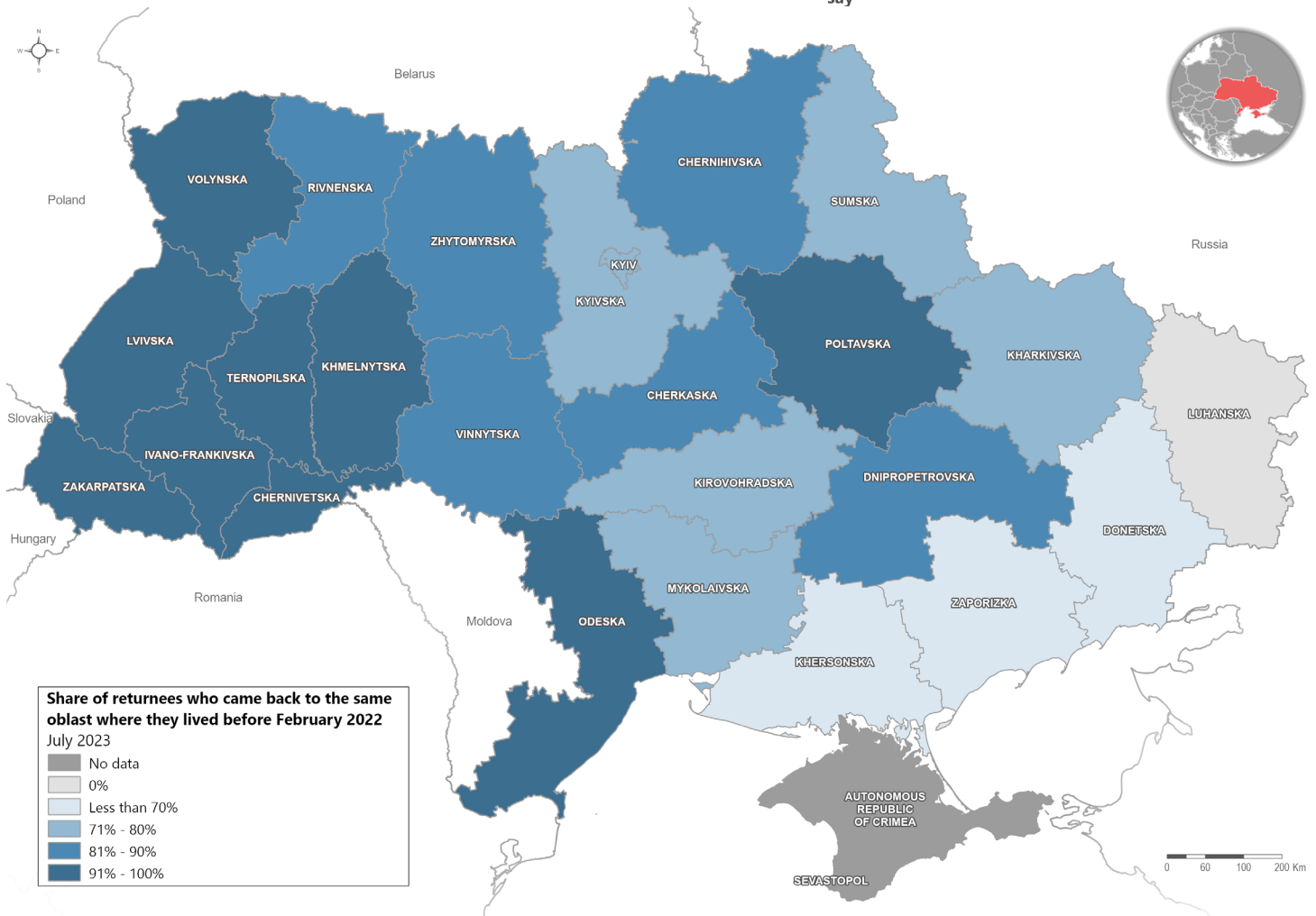
### 3.2. GEOGRAPHICAL DISTRIBUTION

During this survey round, almost 40% of participants had returned to Ukraine, while 27.4% remained in Poland and 11.5% in Germany. Overall, almost 22% of returnees reported residing in Kyiv or the surrounding Kyivska oblast. Dnipropetrovska (12.4%), Kharkivska (9.3%), and Odeska oblasts (9%) hosted a larger proportion of returnees. These top 5 oblasts accounted for nearly 53% of all returnees.

Geographically, the North of Ukraine saw the highest influx of returnees, at 29.8% as of July, followed by the East (27.4%) and the West (18.5%).<sup>1</sup> When considering the overall sample of those who left Ukraine after 2022, Eastern oblasts accounted for 35.2% of respondents, indicating a 6.8 percentage point difference from the return rate to the same region. Overall, 14.1% of returnee respondents resided in the West of Ukraine before full-scale war, yet 18.5% of returnees relocated to Western oblasts upon their return. Conversely, the South and the Centre of Ukraine received the fewest returnees, at 15.9% and 8.4%, respectively.

Distribution of returnee respondents by oblast of origin

July 2023 (N=2,160)



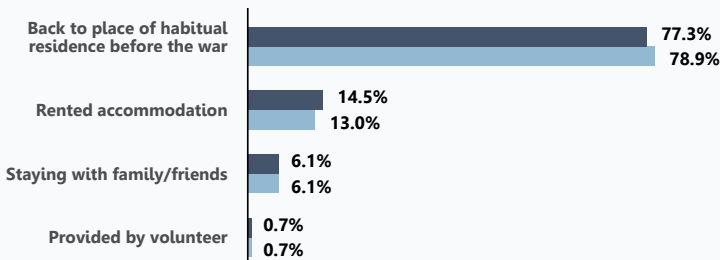


### 3.3. ACCOMMODATION

The vast majority of respondents (77.3%) reported having returned to their place of habitual residence before the full-scale war. Another 14.5% of returnees had rented an accommodation upon their return and 6.1% were living with family or friends. Among those respondents who reported owning property, 93.9% paid only for their utilities and 3.2% stayed at no cost. Overall, 76.1% of assessed returnee households were only required to pay for their utility payments, a trend that coincided with the increase in people returning to their residence prior to the full-scale war.

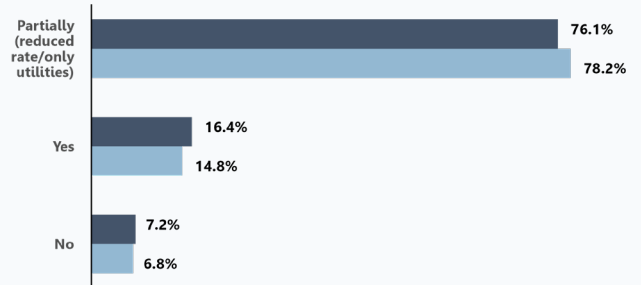
#### Returnees' accommodation (top 4)

Round June 2023 (N=2,010) July 2023 (N=2,161)



#### Returnees' rent payment (top 3)

Round June 2023 (N=2,010) July 2023 (N=2,161)



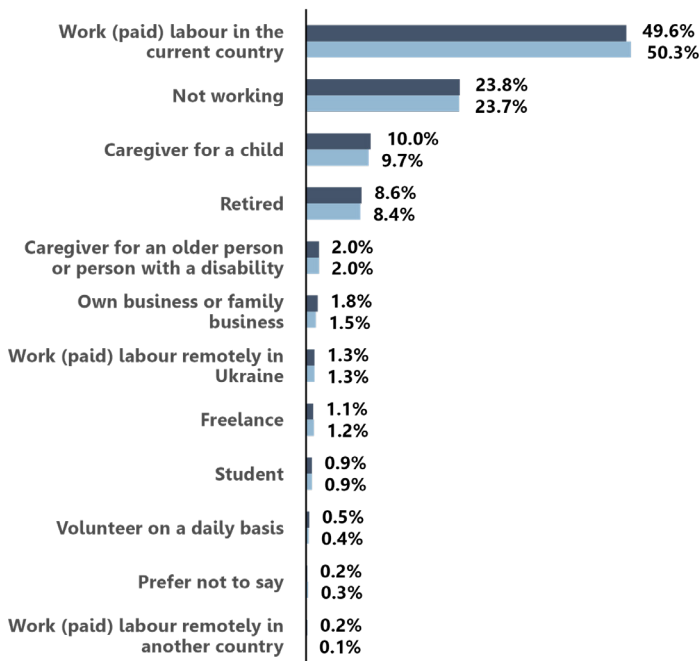
### 3.4. OCCUPATION

In July, almost half of surveyed returnees (49.6%) were engaged in paid work in their current country of residence. When considering other types of paid work — such as freelancing, remote work, or business ownership, constituting 4.4% collectively — the overall employment rate among surveyed returnees was 54% in July. The prevalence of the role of ‘child caregiver’ remained stable and stood at 10% in Round 15. The prevalence of other occupations also remained relatively consistent. Specifically, 23.8% of respondents in July reported having no occupation, 8.6% identified as retired, and 2% were caretakers for older persons (65+ years) or people with disabilities.

Almost 42% of those who had returned to Ukraine worked in professional roles. Service and sales workers constituted the second largest employment category, making up 20.4% of respondents in this survey round. Managers remained stable at around 12%. As of July, roles like plant and machine operators and assemblers (2.2%), skilled agricultural, forestry, and fishery workers (0.6%), and Armed Forces occupations (0.4%) were least common among returnees. There were no substantial shifts in the proportions of employment categories during the two observation rounds.

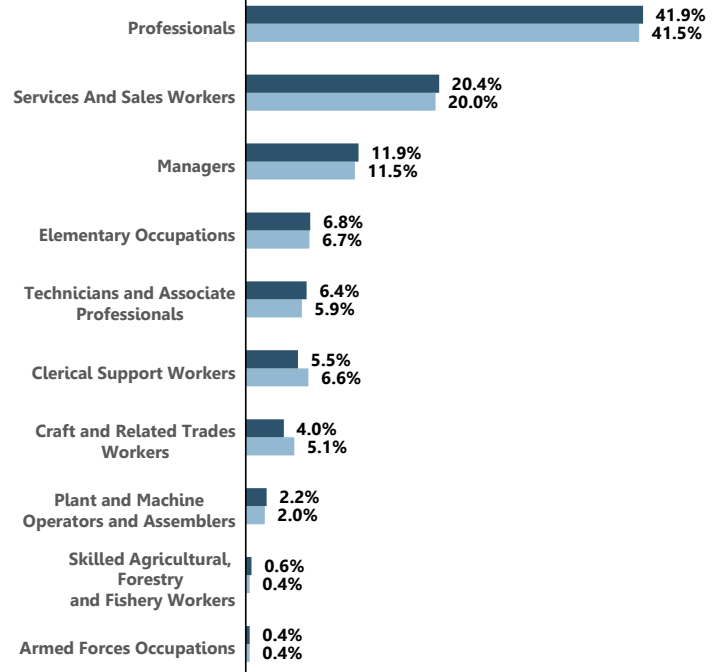
**Returnees' occupation**

Round June 2023 (N=2,010) July 2023 (N=2,161)



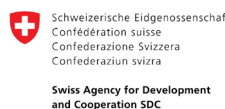
**Returnees' current employment**

Round June 2023 (N=1,049) July 2023 (N=1,113)



#### Occupation by macro-regions (Round 15: July 2023)

OCCUPATION	NORTH	EAST	WEST	CENTRE	SOUTH
WORK (PAID) LABOUR IN THE CURRENT COUNTRY	57.0%	51.2%	47.0%	41.6%	41.0%
WORK (PAID) LABOUR REMOTELY IN UKRAINE	1.4%	0.5%	2.1%	1.2%	1.4%
OWN A BUSINESS OR FAMILY BUSINESS	2.8%	1.7%	1.3%	2.9%	0.0%
FREELANCE	1.1%	0.7%	1.8%	0.0%	1.7%
WORK (PAID) LABOUR REMOTELY IN ANOTHER COUNTRY	0.2%	0.2%	0.0%	0.0%	0.6%
NO OCCUPATION	16.9%	26.6%	23.8%	27.2%	30.1%
CAREGIVER FOR A CHILD	8.0%	8.2%	13.2%	11.6%	12.4%
CAREGIVER FOR AN ELDERLY OR PERSON WITH DISABILITIES	1.9%	0.8%	2.8%	11.6%	2.9%
RETIRED	8.7%	8.8%	5.9%	11.0%	9.2%
OTHER/PREFER NOT TO SAY	0.2%	0.3%	0.3%	0.6%	0.0%
SAMPLE SIZE	N=635	N=601	N=387	N=173	N=346



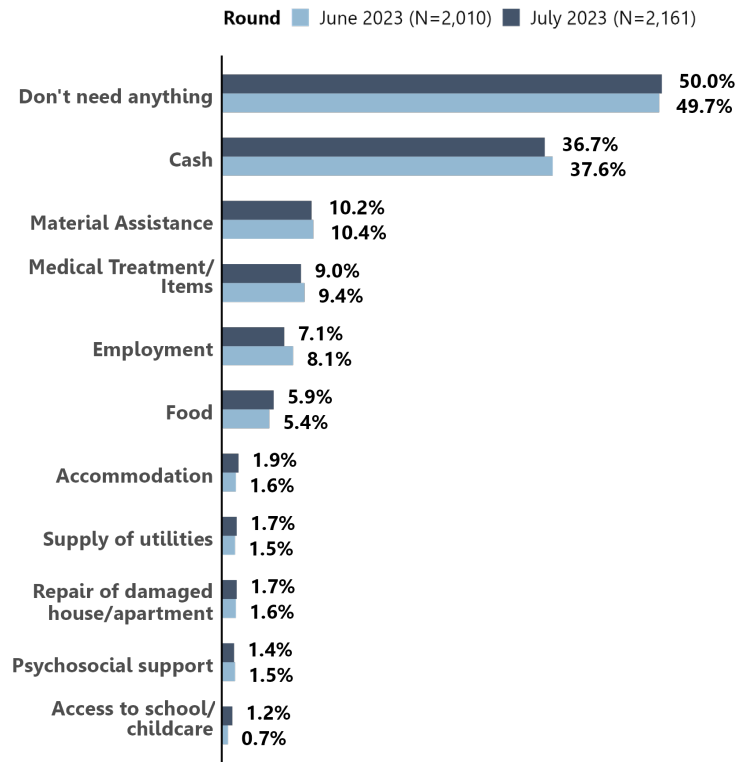
### 3.5. NEEDS AND ASSISTANCE

The ratio of unmet needs remained stable for both the July and June rounds, with around half of all respondents indicating such needs. This percentage varied slightly by macro-region. Notably, in the South, the proportion of households with urgent needs (57.5%) exceeded the average, while those in the Centre reported a lower-than-average rate of unmet needs (45.1%). However, returnees to the North (54.3%), West (51.3%), and East (51.1%) reported levels of unaddressed needs close to the overall rate. In July, the margin for this indicator was 6.5 percentage points higher for refugees compared to returnees.

The most commonly reported urgent needs included cash, material assistance, medical items or treatments, job opportunities, and food. As reported in Round 14, cash was the most frequently cited need, with 36.7% of returnees expressing a critical need for it in Round 15.

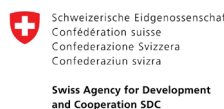
Households with people with disabilities (44.0%), pregnant/breastfeeding women (41.2%), or respondents over 65 (44.0%), stated the need for cash at a higher-than-average level (36.7%). When it comes to material assistance needs, households with pregnant/breastfeeding women demonstrated the largest deviation from the average, with one in three households (32.4%) citing this as an urgent need compared to 10.2% on average as of July.

#### Returnees' top 10 urgent unmet needs



#### Urgent needs by different population groups (Round 15: July 2023)

URGENT NEEDS	HOUSEHOLDS WITH CHILDREN	HOUSEHOLDS WITH PEOPLE WITH DISABILITIES	PERSONS 65 YEARS AND OLDER	HOUSEHOLDS WITH PREGNANT OR BREASTFEEDING WOMEN
CASH	37.5%	44.0%	44.0%	41.2%
MATERIAL ASSISTANCE	11.5%	13.3%	13.0%	32.4%
MEDICAL TREATMENT/ITEMS	7.2%	20.7%	22.0%	13.2%
EMPLOYMENT	7.1%	7.7%	2.0%	1.5%
FOOD	6.2%	8.0%	6.0%	14.7%
ACCOMMODATION	2.0%	2.0%	0.0%	4.4%
ACCESS TO SCHOOL/CHILDCARE	1.8%	1.3%	0.0%	1.5%
FAMILY REUNIFICATION	1.0%	1.3%	1.0%	1.5%
REPAIR OF DAMAGED HOUSE/APARTMENT	1.6%	3.3%	5.0%	1.5%
PSYCHOSOCIAL SUPPORT	1.3%	0.7%	1.0%	0.0%
SUPPLY OF UTILITIES	1.3%	1.3%	4.0%	1.5%
EDUCATION	0.6%	0.7%	0.0%	0.0%
VISA/DOCUMENTATION	0.6%	0.3%	1.0%	0.0%
INFORMATION ABOUT SERVICES	0.5%	0.3%	0.0%	0.0%
LEGAL ADVICE	0.3%	0.0%	1.0%	0.0%
TRANSPORTATION	0.3%	0.7%	0.0%	0.0%
LANGUAGE TRAINING	0.3%	0.3%	0.0%	0.0%
SAMPLE SIZE	N=1,431	N=300	N=100	N=68



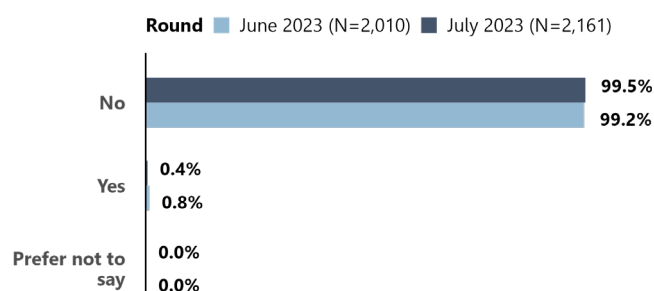
### Top 10 urgent needs by macro-regions<sup>1</sup> (Round 15: July 2023)

TOP-10 URGENT NEEDS	CENTRE	NORTH	WEST	SOUTH	EAST
CASH	37.0%	32.8%	40.7%	39.6%	36.8%
MATERIAL ASSISTANCE	12.1%	9.0%	8.0%	12.1%	12.1%
EMPLOYMENT	8.7%	6.1%	6.7%	8.4%	7.3%
MEDICAL TREATMENT/ITEMS	8.7%	8.3%	10.1%	8.7%	9.5%
FOOD	6.4%	4.9%	7.3%	5.8%	6.2%
ACCOMMODATION	1.7%	2.4%	2.6%	1.2%	1.5%
ACCESS TO SCHOOL/CHILDCARE	0.6%	0.6%	0.5%	1.4%	2.5%
FAMILY REUNIFICATION	2.3%	1.1%	2.1%	0.6%	1.0%
LEGAL ADVICE	0.6%	0.5%	0.0%	0.3%	0.5%
PSYCHOSOCIAL SUPPORT	1.2%	1.6%	0.8%	2.0%	1.3%
SAMPLE SIZE	N=173	N=635	N=386	N=346	N=601

## 3.6. DISCRIMINATION

Discrimination among returnees is very uncommonly reported. In the July survey, less than 1% reported experiencing discrimination either personally or within their household, compared to 3.8% of refugee respondents reporting being discriminated against abroad. This coincides with the fact that the majority of refugees (60.5%) reported discrimination based on 'being Ukrainian.'

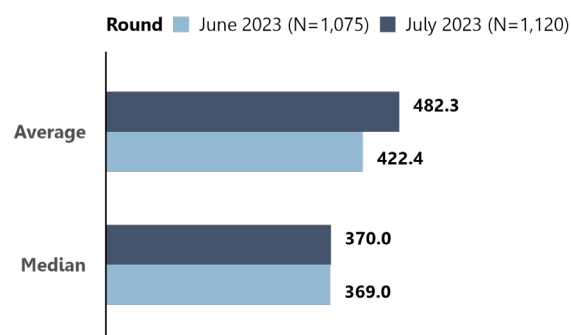
### Returnees' discrimination



## 3.7. INCOME

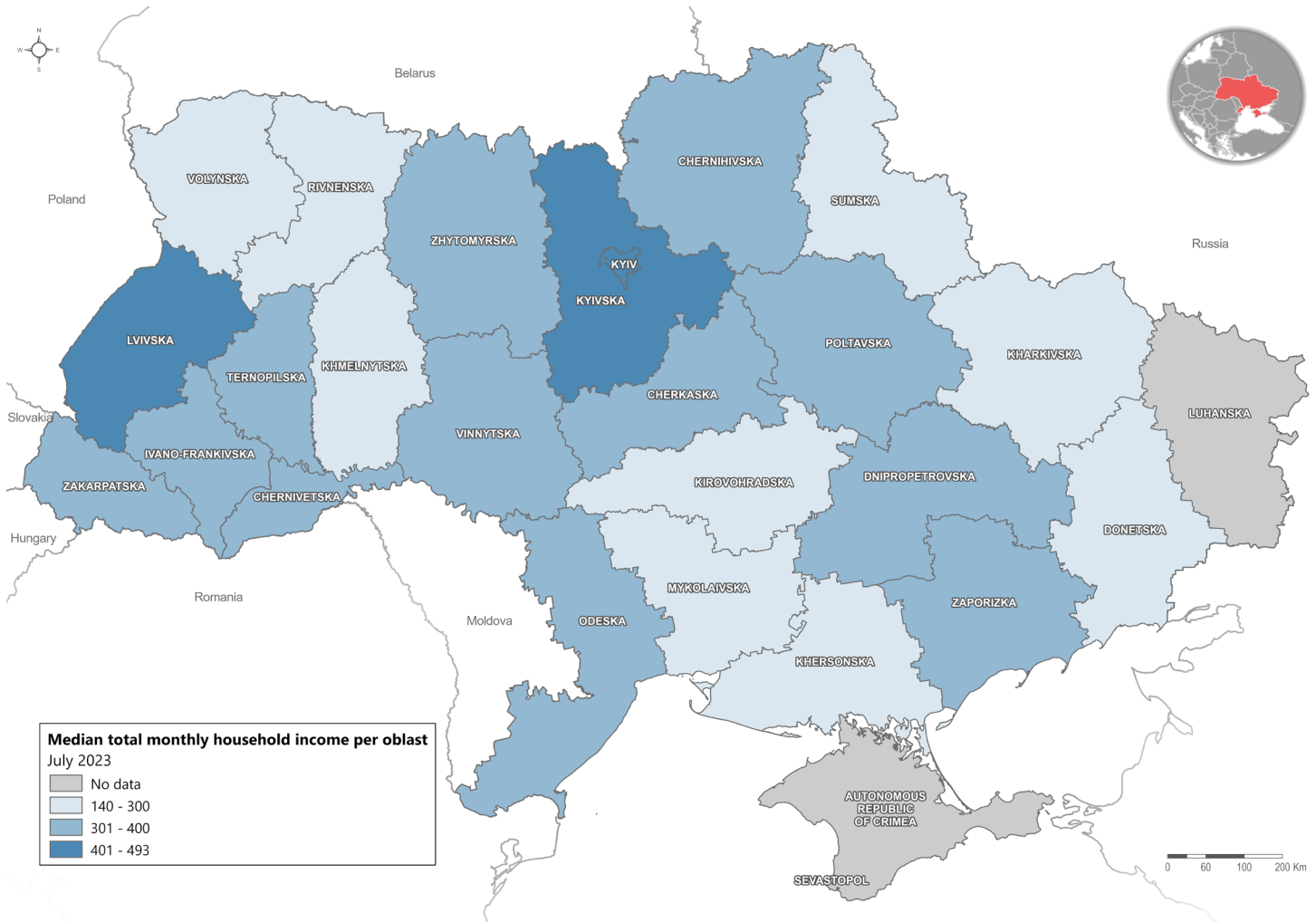
There was a modest increase in the income of returnee households in July, with the median income at 370 euros, and the average income at 482 euros, with the latter being almost 60 euros more compared to Round 14. In July, households returning to the Western region reported the highest average income at almost 640 euros and a median income of 370 euros. Households residing in Northern oblasts reported an average income of 532 euros and the highest median income at 443 euros. The East and South regions followed, with median incomes around 345 euros and 320 euros, respectively, and average monthly incomes of 414 euros for the East and 395 euros for the South. Households that returned to the Central macro-region reported median and average incomes of 320 euros and 384 euros, respectively.

### Returnees' monthly household income (Euro)



### Monthly income of household by macro-regions, euro (Round 15: July 2023)

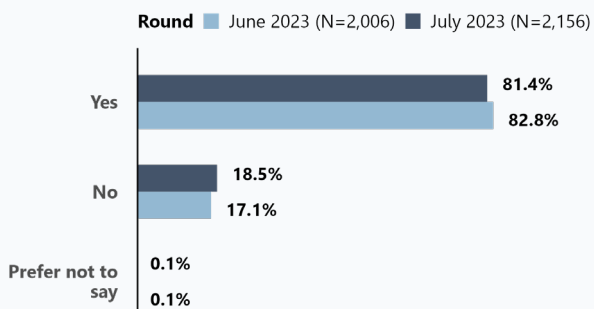
MONTHLY INCOME BY HOUSEHOLD	NORTH	EAST	WEST	CENTRE	SOUTH
AVERAGE	532	414	640	384	395
MEDIAN	443	345	370	320	320
SAMPLE SIZE	337	329	194	90	162



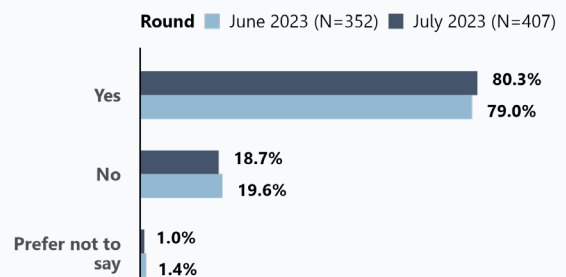
### 3.8. DOCUMENTATION

In August, 81.4% of those who had returned to Ukraine returned to the settlements they had resided in before the full-scale war. Conversely, 18.5% indicated they were living in a location different from their usual residence, thereby constituting them as internally displaced persons (IDPs). Among these IDPs, 80.3% had obtained IDP documentation, while 18.7% had not. Of those not registered as IDPs, a significant proportion (94.7%) had not applied for such documentation, including 68.4% who stated there was no need for it, or the oblast was not among those listed to receive this document according to Ukrainian legislation.

#### Returnees residing in their pre-war location



#### Returnees' having IDP documentation

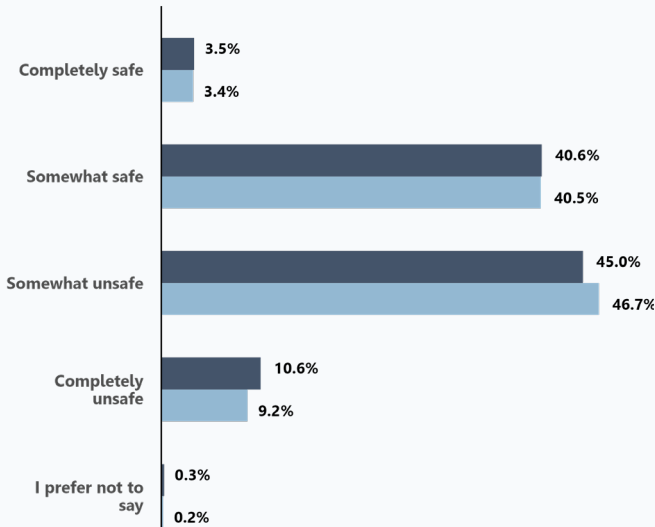


### 3.9. SAFETY AND DAMAGES

In this round, 55.6% of returnees reported feeling either somewhat or entirely unsafe in their present location, which is almost equivalent to the previous round (55.9% in June). However, IDPs reported deteriorating safety conditions in their pre full-scale war residences more often. In July, 87.2% of them perceived their settlements of habitual residence as somewhat or completely unsafe.

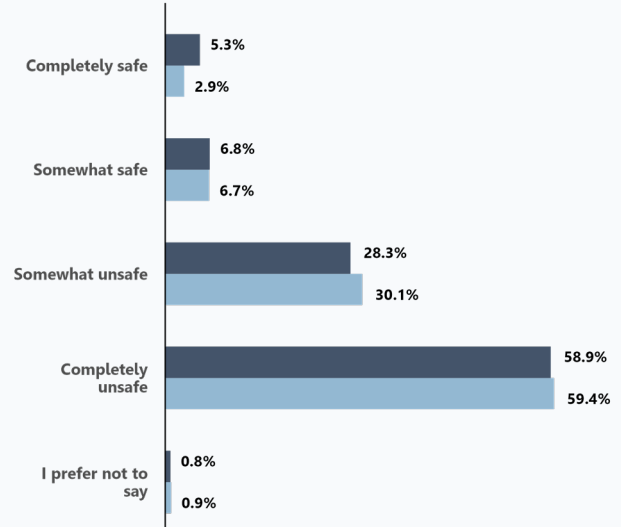
**Returnees' safety perceptions in the current location**

Round June 2023 (N=2,010) July 2023 (N=2,161)

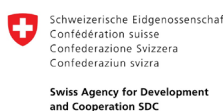
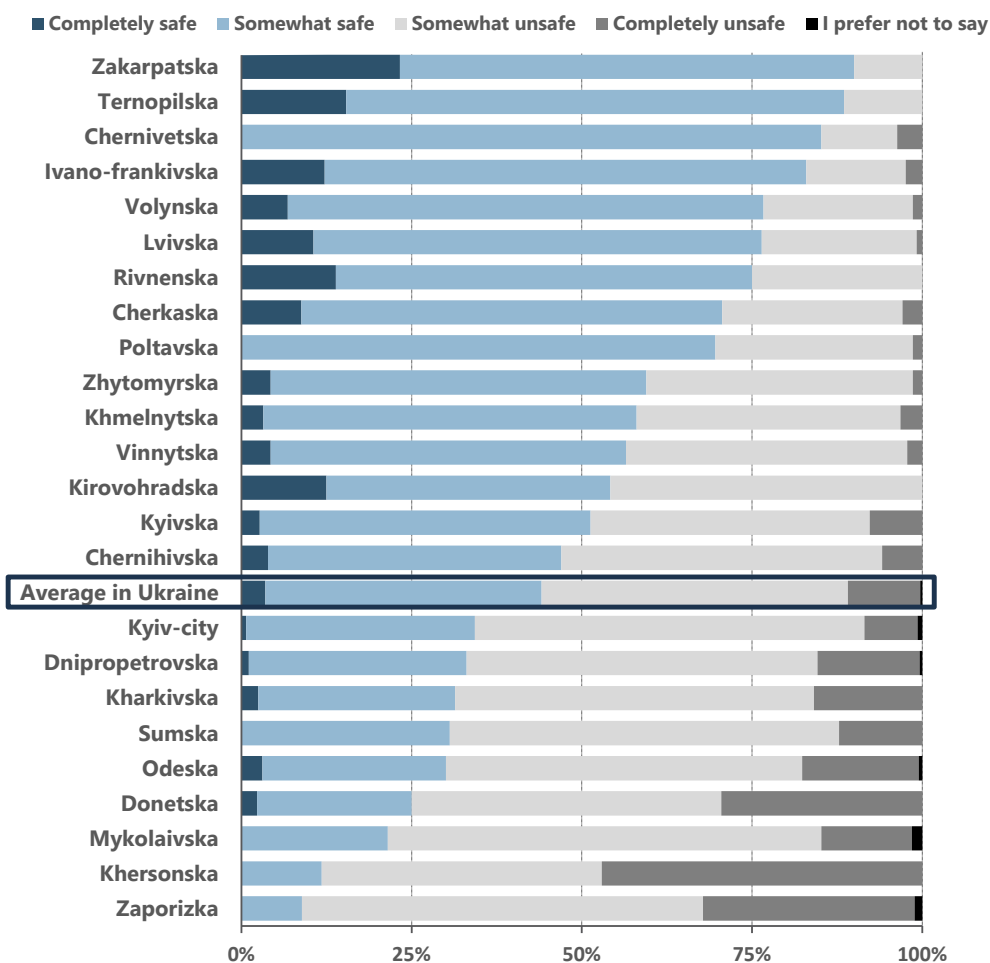


**IDPs' safety perceptions of their pre-war location**

Round June 2023 (N=345) July 2023 (N=399)

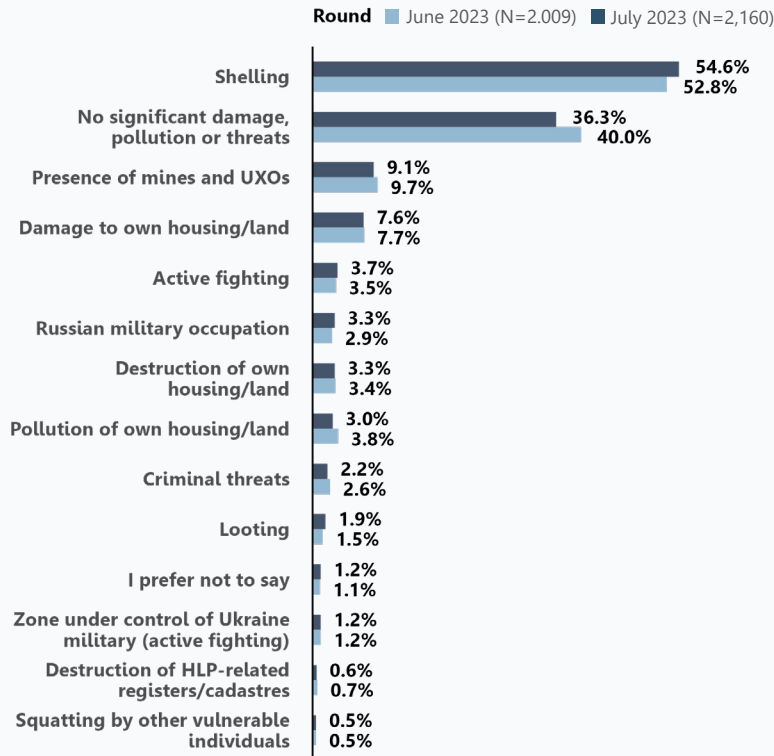


**Returnees' safety perception in the current location July 2023**





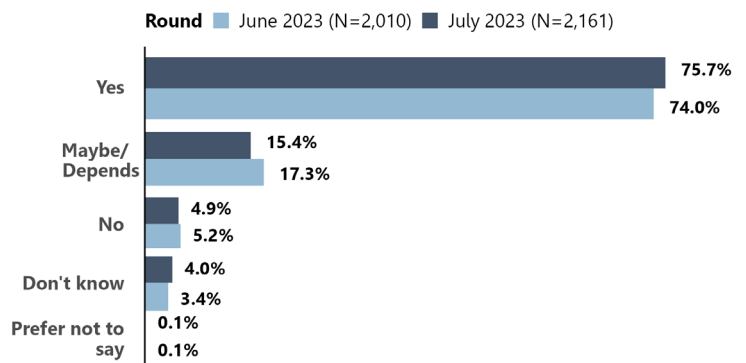
### Returns' perception of protection risks in the area of origin



## 3.10. INTENTIONS

Amongst returnees, 75.7% stated planning to stay in their current location for the three months that followed data collection. The percentage of respondents unsure about their plans for the next three months slightly dropped from 17.3% to 15.4% from June to July. Despite the uncertainty among returnees, a significant portion still intends to stay in their current location, which underscores the necessity of integrating returnees into their communities.

### Returns' intentions to stay for 3 month in the current location



## ENDNOTES

- A macro-region is understood in this survey as a territorial unit comprised of multiple oblasts. To ease readability of the findings, oblasts were grouped by macro-regions in the following way with the following proportion of respondents:

  - North:** Kyiv-city (44.6%), Kyivska oblast (28.8%), Zhytomyrska oblast (10.9%), Chernihivska oblast (8.0%), Sumska oblast (7.7%).
  - South:** Odeska oblast (55.8%), Mykolaivska oblast (39.0%), Khersonska oblast (4.9%), Crimea (0.3%).
  - East:** Dnipropetrovska oblast (44.3%), Kharkivska oblast (33.4%), Zaporizka oblast (15.0%), Donetska oblast (7.3%), Luhanska oblast (0.0%).
  - West:** Lvivska oblast (31.8%), Volynska oblast (18.9%), Ivano-Frankivska oblast (10.6%), Rivnenska oblast (9.3%), Zakarpatska oblast (7.8%), Khmelnytska oblast (8.0%), Ternopil'ska oblast (6.7%), Chernivetska oblast (7.0%).
  - Centre:** Poltav'ska oblast (39.9%), Vinnytska oblast (26.6%), Cherkaska oblast (19.7%), and Kirovohradska oblast (13.9%).
- ISCO-08: International Standard Classification of Occupations. This data is available [here](#).

