NARODOWY
BANK POLSKI

The living and economic situation of Ukrainian migrants in Poland in 2023

Report of the questionnaire survey

Department of Statistics
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Summary of key findings

This report presents the results of a survey conducted among adult migrants from Ukraine in Poland between 8 May and 7 July 2023. The survey involved both refugees and pre-war immigrants. The survey was the third one conducted by Narodowy Bank Polski since the outbreak of the war in Ukraine. The most important conclusions from this survey are as follows:

1. **The demographic structure of the Ukrainian migrants in Poland has not changed much compared to November 2022. What still sets aside refugees from pre-war migrants is gender diversity.** Adult migrants from Ukraine are by and large women – roughly 68% (55% of the pre-war migrants, and 78% of the refugees). More than a half are aged 27 – 44, 48% of the pre-war migrants and 29% of the refugees are staying in Poland with a spouse/partner, whereas over 40% of the refugees and 30% of the pre-war migrants are living in Poland with underage children. Most of the Ukrainian citizens staying in Poland with underage children send them to Polish schools or pre-schools.
2. **The migrants are well-educated.** 42% of the pre-war migrants and 48% of the refugees claim they have tertiary education. Knowledge of the Polish language among the refugees has improved. Only 13% of them say that they do not speak Polish. In turn, nearly 60% of the pre-war migrants assess their knowledge of Polish as very good.
3. **Work is the primary source of income for the migrants from Ukraine.** The economic situation of the refugees is more difficult than that of the pre-war migrants. Income earned working in Poland is supplemented with Polish social benefits, mainly funds from the "Family 500+" programme. Money received from Ukraine is an additional source of income mainly for the refugees. Besides those who are teleworking (they are paid salaries from Ukraine) and entrepreneurs, such money is mainly paid to the unemployed.
4. **Integration of the Ukrainian refugees in the Polish labour market is progressing more slowly than in 2022.** There is still a difference between the pre-war migrants and the refugees in the Polish labour market. The former more often have permanent jobs and are much less often unemployed or economically inactive. The rate of employment in the case of the refugees has decreased slightly compared to 2022 (from 65% in November 2022 to 62% in the current survey). The percentage of the refugees looking for a job remains at about 25% (which is much higher than the general unemployment rate in Poland), and just over 10% of the refugees are not working or looking for a job.
5. **The immigrants' wages to a greater extent depend on the sector they work in in Poland and the time of their arrival than on formal education**. The pre-war immigrants and the refugees working in information technology, construction and transport earned the most. The lowest wages are offered in agriculture, household services and tourism. Apart from the information technology and construction sectors, there still remains a big

difference between the medians of wages between the refugees and the pre-war immigrants.

6. **The presence of family members and children in Poland influences the economic activity of female refugees.** Male and female refugees from Ukraine have permanent jobs more often when they do not have a family in Poland or are staying here without children. Raising children in Poland entails a greater risk of unemployment, especially for women with more than one child. In the case of the pre-war immigrants, the influence of family on economic activity is visibly smaller.
7. **The process of the refugees' gaining financial independence continues**. The protracting stay of the refugees in Poland and changes in the law implemented in 2023, which considerably reduced the possibility of staying in places of collective accommodation offered by the Polish state free of charge, have consequently driven the percentage of the refugees who rent flats by themselves up from 52% to 68%. On the other hand, the percentage of the refugees living in places of collective accommodation has decreased from 19% to 6%. Having a family significantly affects the housing situation of the migrants. Those staying in Poland with a partner or a partner and children more often rent an apartment or own one in Poland.
8. **The migrants still support their relatives in Ukraine**. Those who emigrated before the war have not changed their inclination to remit money abroad in any significant way (over 60% of them do that). The percentage of the refugees remitting money to Ukraine is nearly half that of the pre-war immigrants. Financial aid is supplemented by in-kind aid sent to Ukraine, primarily to relatives, but also to charities.
9. **The difference in strategies concerning future stay in Poland between the pre-war migrants and the refugees continues, though the percentage of the latter who declare a longer stay in Poland has grown a little. To a large extent, the pre-war migration can be called settlement migration.** 61% of the pre-war migrants and 39% of the refugees declare that they will stay in Poland either permanently or longer than one year. The percentage of people who want to leave Poland to a country other than Ukraine remains marginal and the percentage of those who wish to return to Ukraine quickly is decreasing. Huge uncertainty about the future prevails especially among the refugees, as they find it hard to say how long they will stay in Poland.
10. **Predictions concerning the end of the war are a key factor influencing the refugees' declarations regarding their future.** Economic factors, such as the situation in the labour market or their housing situation, are less important. Apart from them, the attitudes of the migrants are determined by their family situation and age. Families with children declare their intention to stay in Poland permanently or longer than a year much more often than other groups. On the other hand, older people (especially those over 60 years of age) are much more inclined to consider leaving Poland.
11. **In spite of the advancing process of adaptation of the migrants from Ukraine to living in Poland, some of them still expect some support from the Polish state**. The pre-war migrants mention first of all easier legalisation of their stay, access to healthcare services,

and better service in public offices. As far as the refugees are concerned, they mainly expect assistance in finding a job, organisation of Polish language courses and easier legalisation of their stay. Compared with the previous rounds of the survey, the percentage of the respondents expecting to be given Polish language courses has decreased significantly.

12. **The situation of the migrants from Ukraine differs slightly between voivodeships, particularly in the case of the refugees.** The voivodeships in western Poland and the Małopolskie Voivodeship have a bigger percentage of Ukrainian migrants who are planning their future in Poland, including full families. Eastern Poland (mainly the Lubelskie and Podlaskie Voivodeships) are regions with the highest percentage of people intending to return to Ukraine.

Introduction

This report summarises a survey of immigrants from Ukraine conducted in May-July 2023. It is the next edition of the survey carried out by NBP in previous years due to the significant impact of labour and involuntary migration on the Polish economy.

The outbreak of the war in Ukraine on 24 February 2022 caused an influx of war refugees to Poland, who joined a large group of Ukrainian migrants who had come to Poland mainly for economic reasons. In 2022, Narodowy Bank Polski conducted two surveys of the migrants from Ukraine: the first one between 13 April 2022 and 13 May 2022 and the other one in the period from 26 September 2022 to 18 November 2022.

The purpose of the third round of the survey covered in this report, conducted in the period from 8 May to 7 July 2023, was to examine the situation of the migrants after more than a year from the outbreak of the war in Ukraine and, like in the earlier surveys, to evaluate their economic activity and income, to try to evaluate whether their stay in Poland has the nature of permanent settlement or if it is temporary, and also to determine the current scale and characteristics of remittances to Ukraine.

The crux of the study was to evaluate whether the two groups of migrants from Ukraine who arrived in Poland at different times and for different purposes have become alike over the year in regard to the issues listed above or whether there still remain any major differences between them. However, it was important to classify the migrants into two groups: war refugees and pre-war migrants. For one may suspect that as time has passed since the war broke out it has become more and more difficult to tell who is a war refugee seeking sanctuary in Poland and who chose to emigrate to Poland for economic reasons. On the one hand, this is due to the fact that some of the immigrants who came to Poland before the war were somehow detained here by it. Although their arrival before 2022 may have been motivated by economic considerations, the outbreak of the war and inability to return safely to their country made them in fact become refugees. On the other hand, there is a group of migrants whose stay in Poland started after the outbreak of the war but it is in fact a continuation of earlier episodes of working in Poland in the sense of gainful employment. Therefore, their return to Poland can hardly be regarded as purely an escape from the war. Both examples demonstrate that the division into refugees and pre-war migrants based on the start date of the current stay (before or after the outbreak of the war) applied in the previous reports is a much less convincing watershed. That is why, in the current report, the definitions of war refugees and pre-war migrants are based on the registration in the PESEL-UKR system and the time of the first arrival in Poland. The PESEL-UKR system was launched in 2022 for the purpose of registering Ukrainian refugees in public institutions in Poland and it may be assumed that it formally identifies war refugees. The criterion of the first entry into Poland made it possible to evaluate the migration experiences of the migrants related to their stay in Poland, for it may be concluded that anybody who came to Poland for the first time in 2022 or 2023 is a refugee even if they did not register in the PESEL-UKR database.

To sum up, the following terms are used concerning migrants from Ukraine coming to Poland at different times[1]:

- Pre-war migrants – are people responding in the current round of the survey who did not register in the PESEL-UKR database and whose experiences with non-tourist visits to Poland date back to earlier than 2022.
- Refugees – are people responding in the current round of the survey who registered in the PESEL-UKR database or first came to Poland in or after 2022.

The definitions adopted for this report (**Figure 1**) mean that 60% of the respondents in the current survey were war refugees and 40% were pre-war migrants (i.e. those who did not register in the PESEL-UKR database and whose experiences with stays in Poland are earlier than 2022).

Figure 1. Immigrants by the time of arrival in Poland and registration in PESEL-UKR

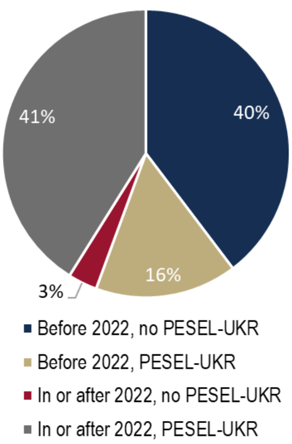
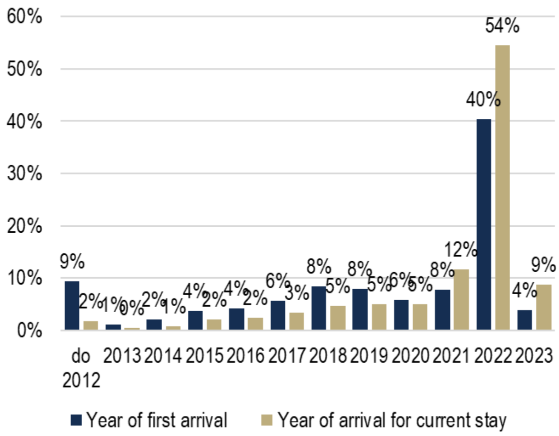


Figure 2. Immigrants by the year of arrival for current stay and the year of first arrival in Poland



Most of the refugees are people who came to Poland in 2022 or 2023 and registered in the PESEL-UKR (41%) database. About 3% are those who came after the war broke out in 2022 but have not registered in the database. In turn, those who first came to Poland before 2022 but are registered in the PESEL-UKR database account for 16%.

Data concerning the time of the first arrival and the arrival for the current stay (**Figure 2**) show that nearly 20% of all the respondents are those who had had experiences with migration before 2022, when they started their current stay in the year when the war broke out or

[1] Apart from the basic division applied in the report, data from the previous reports are used in some graphs and the body text of the report. In such cases, terms referring to the end dates of the surveys which are sources of comparable data are used. For example: July 2022 refugees, Sep.2022 refugees, May 2022 refugees.

later. Data concerning the time of the first and the current stay (Figure 2) indicate that 63% of the respondents commenced their current stay in Poland either in 2022 or 2023, and 44% of them arrived to Poland for the first time then. Hence, 19% of the respondents were people who had stayed in Poland before the war when they started their current stay in 2022 or 2023. Thus, such earlier experiences with staying in Poland might have helped some refugees in their current stay in Poland.

1. Demographics of the immigrants

1.1. Basic characteristics of the respondents

The results of the survey show that the vast majority of the pre-war migrants from Ukraine came to Poland after 2014. Only 5% of the respondents came to Poland earlier. The year 2014 is an important date because it is when the first conflict and the political crisis driving economic emigration from Ukraine occurred. The biggest percentage (12%) of the pre-war migrants started their present stay in Poland in 2021 – just before the war broke out. Most of the pre-war migrants came to Poland from the central and western parts of Ukraine **(Figure 3)**, which may be explained by their high mobility and the proximity of Poland. As far as the refugees are concerned, it is virtually impossible to identify a predominant region of origin. No major changes have occurred in this respect since the previous survey in November 2022.

Figure 3. Regions of origin of the pre-war migrants and refugees from Ukraine in Poland.

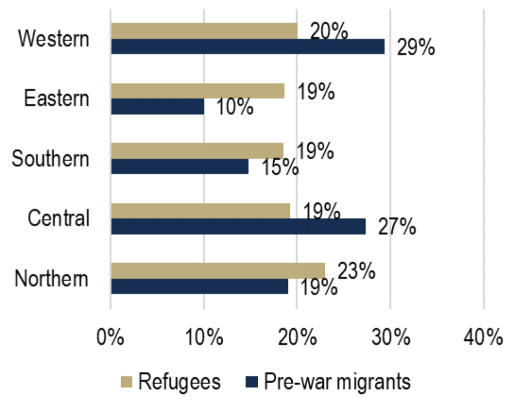
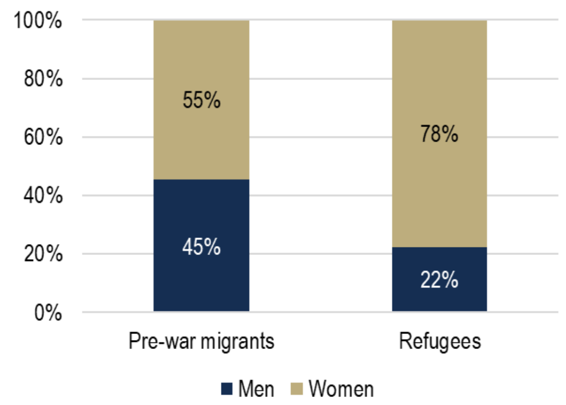


Figure 4. Pre-war migrants and refugees from Ukraine in Poland by gender.



The Ukrainian citizens staying in Poland are mostly women – nearly 68% of all the respondents **(Figure 4).** The prevalence of women is visible among the refugees (78%), as well as the pre-war migrants (55%). The percentage of men among the refugees has increased a little, from 19% to 22%.

In terms of age, half of the respondents, both pre-war migrants and refugees, were young, aged 27 – 44, meaning at prime age, i.e. when one starts a family and is most active in the labour market **(Figure 5)**. What differentiates the two groups of Ukrainian nationals is a markedly higher percentage of the elderly among the refugees (9% are aged 60 and more), meaning people who would not decide to emigrate under normal circumstances.

Figure 5. Pre-war migrants and refugees from Ukraine in Poland by age.

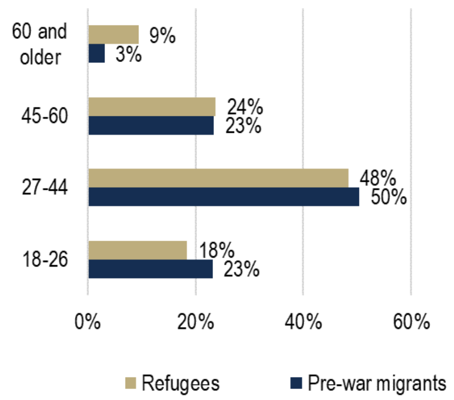
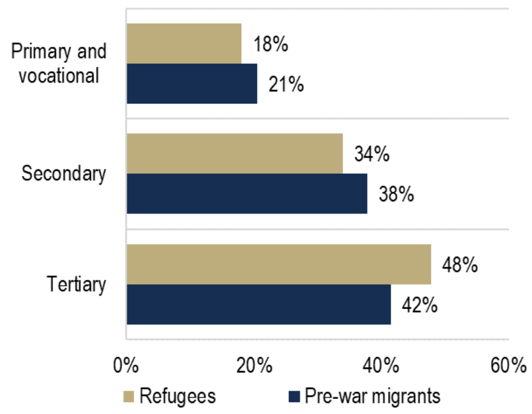


Figure 6. Pre-war migrants and refugees from Ukraine in Poland by level of education.



The percentage of Ukrainian nationals with tertiary education is 42% among the pre-war migrants and 48% among the refugees **(Figure 6)**. Secondary education was acknowledged by 43% of the refugees and 38% of the pre-war migrants. One in five had either primary or vocational education in both subgroups of the respondents. Thus, it may be said that the Ukrainians staying in Poland are well-educated. It is a valuable insight in the context of employment support for the refugees.

The structure of the migrants from Ukraine in terms of education has not changed much since the previous survey.

1.2. Family situation of the immigrants

The family situation of the immigrants in Poland is an important issue in the demographic analysis. A vast majority of all the refugees, regardless of their family classification, are women (78%). Unlike that of female refugees, the family situation of male refugees (22%) was less diversified **(Figure 7)**: the percentages of men who had a partner but no children, men with a partner and children and men with only other relatives were similar (about 6% in each category). Most of the female refugees had a partner and children (23%), whereas 21% were single mothers. The percentages of women with only other relatives or a partner but no children were smaller (14% and 11%, respectively).

The structure of the refugees by family situation in Poland (**Figure 8**) differs considerably from their overall family situation, which reflects the processes of selection of immigrants coming to Poland after the outbreak of the full-scale war in Ukraine. Woman staying in Poland with children but with no other relatives made up the highest percentage (26% of all the refugees), whereas women migrating with children and a partner (husband) accounted for 12%. However, it should be noted that the percentage of women staying in Poland without children or a partner, either alone or with other relatives, is also very high (32% in total). Most of the men in this group of immigrants had no relatives in Poland.

In the case of the pre-war migrants, the family situation of men and women was more or less similar (**Figure 9).** People with only a spouse predominated and the percentage of couples with children was also high. On the other hand, there were relatively few people without relatives or single parents. This is reflected in the corresponding structure of relatives staying in Poland (**Figure 10),** although the most frequent answer concerning the family situation in Poland is that they were staying here without close relatives (14% of women and 17% of men).

Figure 7. <u>Refugees</u> from Ukraine by gender and the whole family they have (percentages add up to 100%)

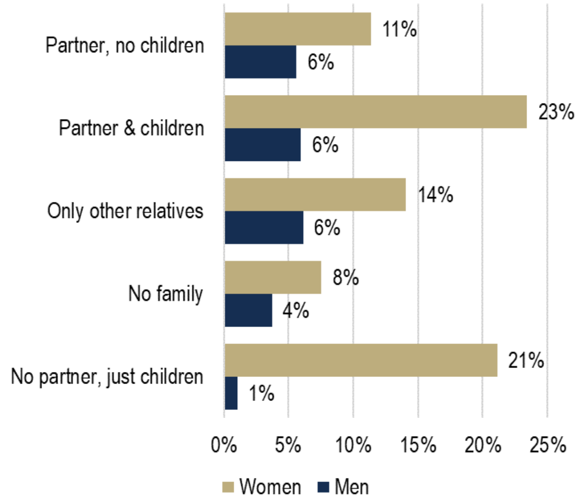


Figure 8. <u>Refugees</u> from Ukraine by gender and family staying in Poland (percentages add up to 100%)

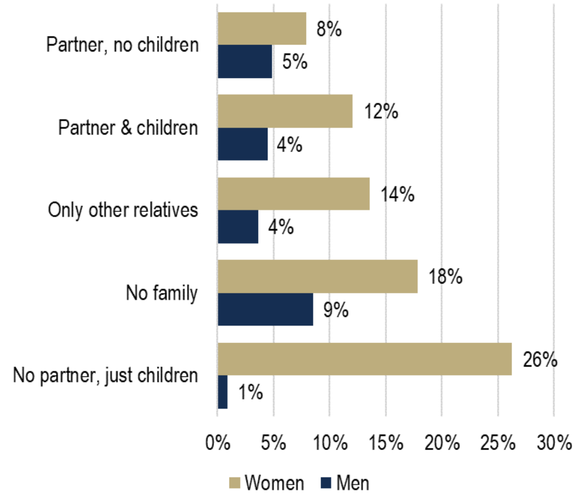


Figure 9. <u>Pre-war migrants</u> from Ukraine by gender and the whole family they have (percentages add up to 100%)

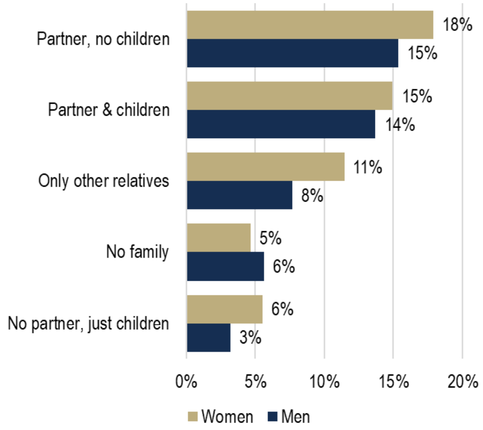
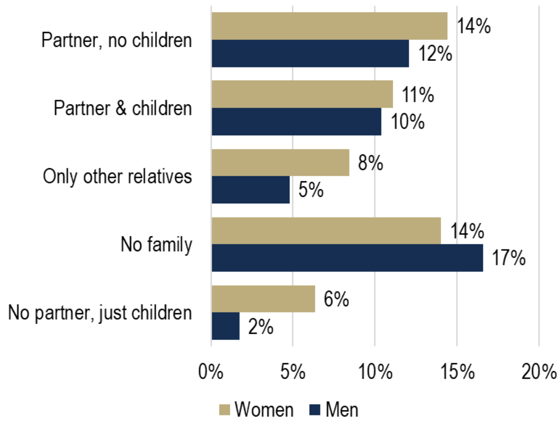


Figure 10. <u>Pre-war migrants</u> from Ukraine by gender and family staying in Poland (percentages add up to 100%)

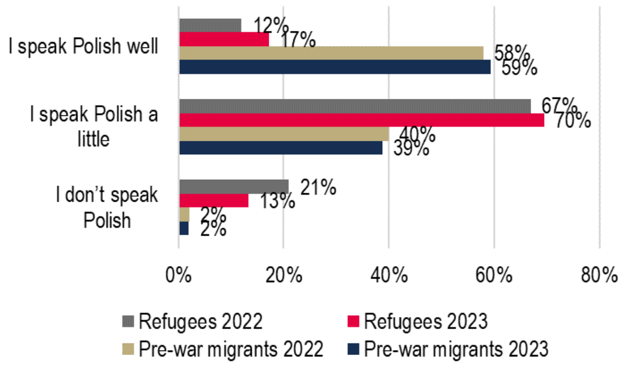


1.3. Schooling in Poland

What is an important issue from the point of view of the long-term residence of the immigrants from Ukraine in Poland is the participation of Ukrainian citizens' children in the

Polish school system. The survey showed that 58% of the people who are staying in Poland with children of up to 18 years of age send them to Polish schools or preschools. That percentage is higher in the case of the respondents living with their own children and approximates 85%. The ability to speak Polish, cultural kinship, and short geographical distance are all important factors connected with settling in Poland. The survey results show that a minor percentage of the Ukrainian citizens coming to Poland do not speak Polish at all (**Figure 11**). Only 13% of the refugees admitted that, as did a mere 2% of the pre-war migrants. Most of the latter speak the language of the host country either well or a little. As far as the refugees are concerned, there has been a significant change compared to the early period of their stay in Poland.

Figure 11. Command of Polish among migrants from Ukraine, 2022 – 2023



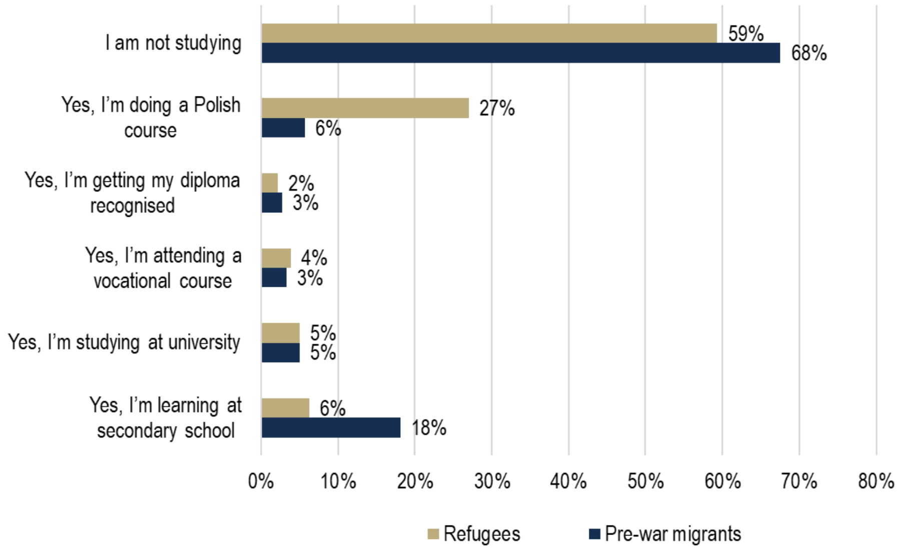
In the survey conducted by NBP in May 2022, 46% of the refugees said that they did not speak Polish and only 5% responded that they knew the language well.[2] It seems that the change results from the fact that the refugees have been staying in Poland for nearly 18 months. They are learning Polish in their everyday lives and in the workplace.

Apart from the command of the Polish language, participation in the Polish education system is another important issue from the point of view of the long-term stay of foreign nationals in Poland. It may be concluded on the basis of the survey results that in most cases Ukrainian respondents who came to Poland are not pursuing education **(Figure 12),** which may imply that the main purpose of their coming to Poland was to work or they were forced to come (refugees). Those who have not been in Poland long have a much poorer command of the Polish language, which also makes it more difficult for them to enter the labour market. Another interesting conclusion from the analysis of educational activity is a rather high percentage (27%) of the refugees who are learning Polish, which may shed some light on their future plans to stay in Poland for a long time. On the other hand, the relatively small percentage (6%) of the pre-war migrants learning Polish is the result of the fact that most of them speak

[2] Iza Chmielewska-Kalińska, Beata Dudek, Paweł Strzelecki *The living and economic situation of Ukrainian migrants in Poland*. Report of a questionnaire survey conducted by the Regional Branches of NBP, NBP Department of Statistics, Warszawa 2022.

Polish well or sufficiently well. Nearly 10% of the migrants from Ukraine are studying at university in Poland and the percentage is similar for the pre-war migrants and the refugees.

Figure 12. Education of Ukrainian nationals in Poland



**More than one answer concerning education was allowed, hence the results do not add up 100.*

2. Immigrants from Ukraine in the Polish labour market

The period of influx of refugees following the outbreak of the all-out war in Ukraine was also a time when the unemployment rate was relatively low and rather high demand for labour continued, which made it easier for the immigrants to find jobs. The following sections discuss the situation of the two groups, i.e. the pre-war migrants and the refugees, in terms of economic activity and the influence exerted on it by the family situation and income.

2.1. Economic activity of the immigrants

As was the case in the survey from September 2022, a big difference remains between the refugees who came in or after 2022 and the earlier immigrants (**Figure 13**). Among the pre-war migrants, 94% were employed in various forms, while in the case of the refugees it was 64%. In particular, the earlier immigrants much more often had permanent contracts (77%) than the refugees (36%). On the other hand, a large proportion of the refugees continued to be unemployed, looking for a full-time or a part time job. Compared with the September 2022 survey, the labour market situation of the war refugees from Ukraine has stabilised (**Figure 14**), following an initial major improvement from May to September 2022.

Figure 13. Economic activity of refugees from Ukraine in 2023

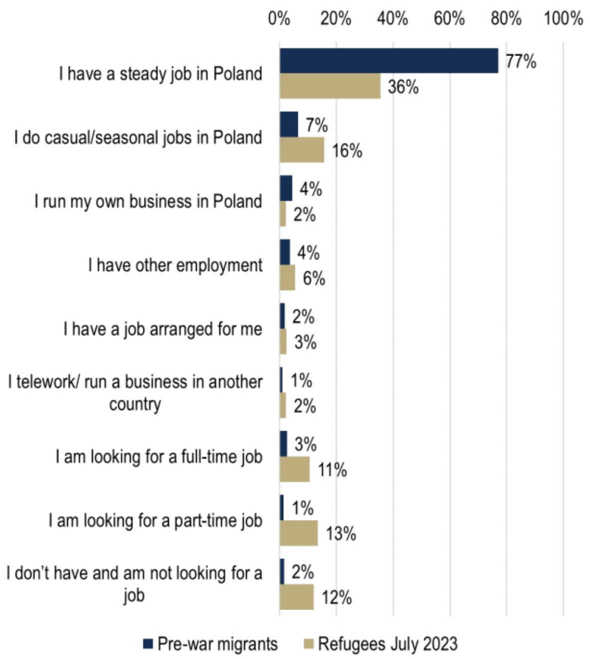
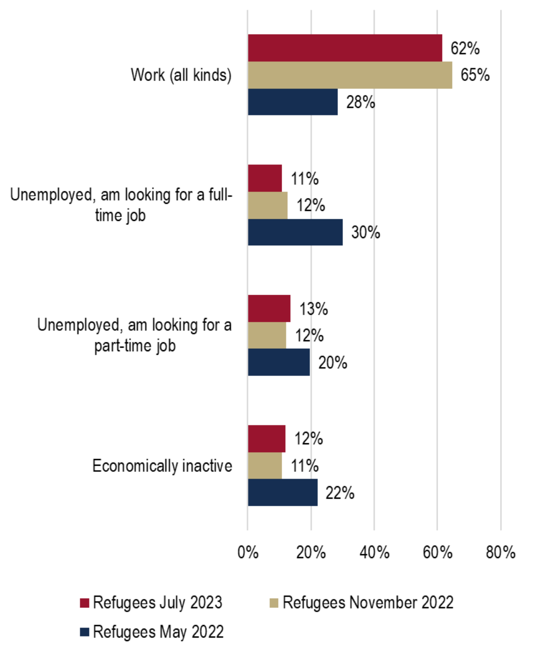


Figure 14. Changes in the economic activity of the refugees from Ukraine



From the fourth quarter of 2022 to the end of the first half of 2023, the percentages of the employed and unemployed refugees changed rather little. The percentage of refugees working in the Polish economy and that of refugees looking for a job (unemployed) were similar to the percentages observed in the September 2022 survey.

As far as the refugees from Ukraine are concerned, men fare visibly better in the Polish labour market then women (**Figure 15**). More of them have jobs (71% vs. 61%), and in particular more men have permanent jobs (44% vs. 33% of women), and fewer of them are unemployed (15% vs. 27%). This may be a result of greater demand for labour in jobs more often done by men and the processes of selection of male refugees – generally they have been in service longer (more senior), but on the other hand female refugees look after children more often.

There are also differences between the two groups of respondents – pre-war migrants and war refugees – in terms of the structure of workplaces (**Figure 16**). Earlier immigrants quite often did jobs requiring special qualifications, though not a university degree. The percentage was close to the share of the respondents saying they were doing unskilled jobs. The refugees who came to Poland and started working turned out to be rather well-educated. For this reason, a little more of them had jobs requiring higher qualifications than earlier immigrants. Nevertheless, the vast majority of the refugees worked in simple, unskilled jobs.

Figure 15. Economic activity of refugees by gender

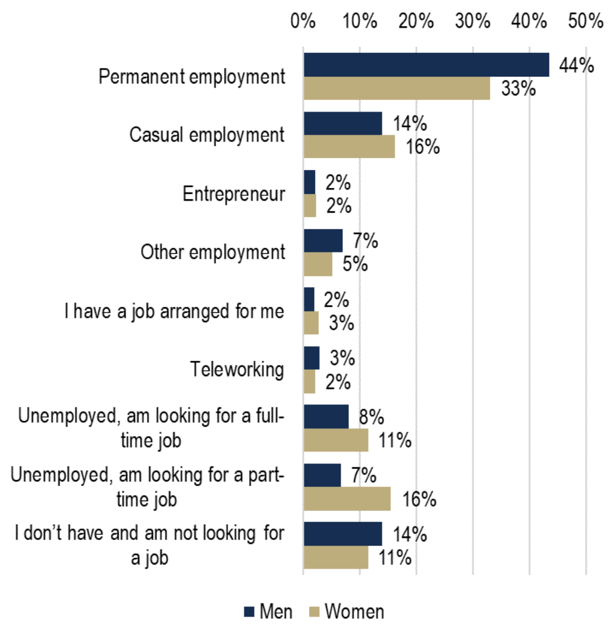
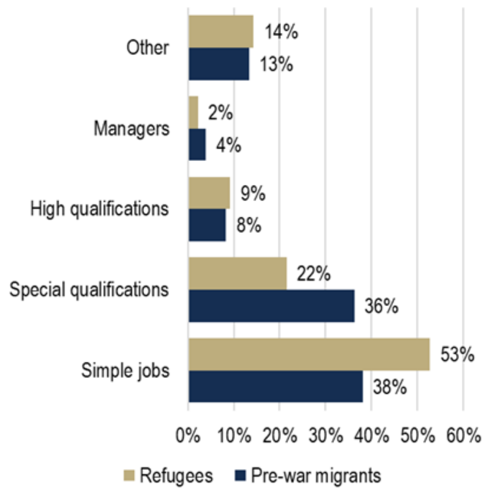


Figure 16. Qualifications required in the jobs done by the refugees and pre-war migrants



The intensity of use of immigrants' labour measured by the average weekly working hours (**Figure 17**) shows that as time passes the refugees more and more often work full time or close to that and less often do casual jobs for just a few hours a week. Yet they still differ in this respect from the pre-war migrants, more of whom work full time or more.

Figure 17. Average number of hours worked per week

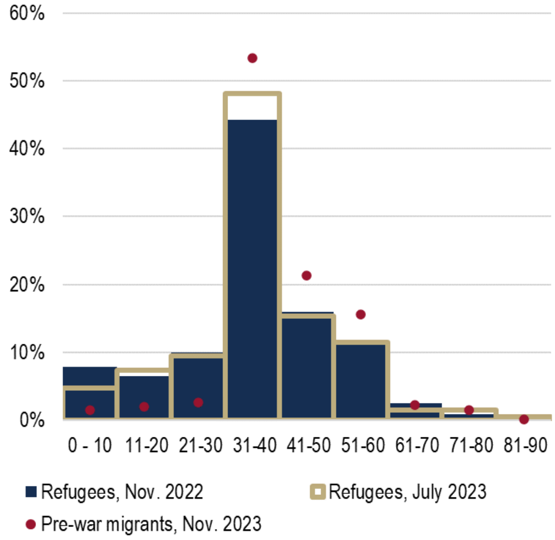


Figure 18. Changes in wage structure

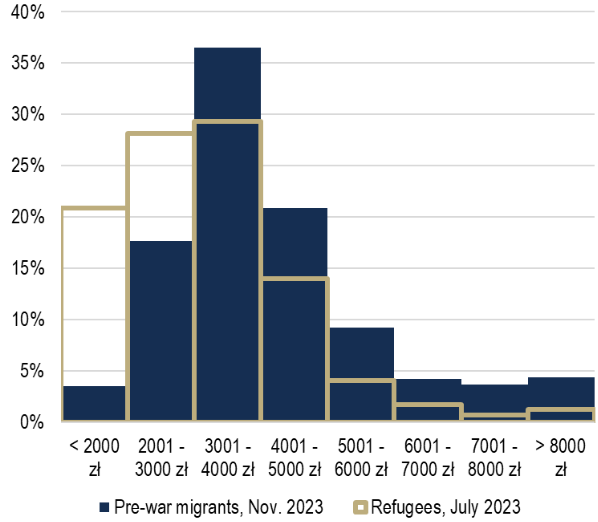


Figure 19. Change in wage structure – refugees

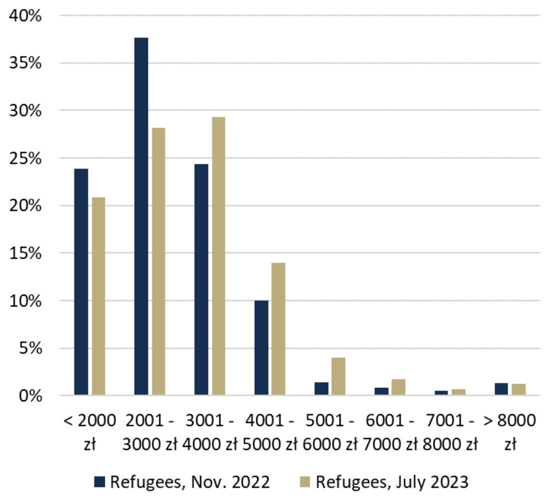
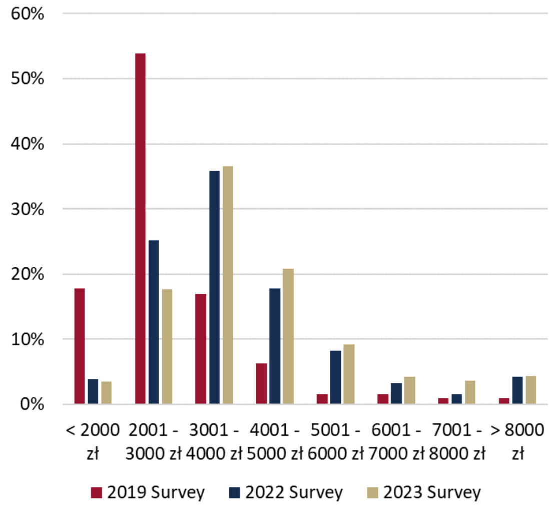


Figure 20. Change in wage structure – pre-war migrants (surveys from 2019, 2022 and 2023)



2.2. Immigrants' wages

There still remain differences in the wage structures of the refugees and earlier migrants (**Figure 18**). Although both groups most often earned in the range of PLN 3,000 – 4,000, net wage per month the refugees quite frequently stated that they earned less than PLN 3,000, net (49% of the responses, vs. 21% among the pre-war migrants). It should be noted, however, that the refugees' wages grew considerably (**Figure 19**), which may be the result of the prevailing record low unemployment rate and of the increase in the minimum wage. The wage structure of the pre-war migrants also changed for the better (**Figure 20**). Based on the nationwide surveys of immigrants conducted since 2019, one can see that the median of wages of the immigrants who came to Poland before the outbreak of the war increased by about

38% in 2019-2022 and by 6% between the surveys in 2022 and 2023. The growth rates were slightly higher than those in the whole Polish economy (the average gross wage grew by 31% in 2019-2022 and by 4% between the dates of the surveys in 2022 and 2023). However, it should be pointed out that because of the wage structure, the immigrants' wages were more affected by the increases in the minimum wage in the Polish economy.

Wages earned by the immigrants in Poland generally do not reflect the formal education received in Ukraine. Regardless of the level of education (tertiary, secondary, primary), the median of net wages in Poland is just under PLN 3,500. Studies of total wages in Poland show that wages differ between micro-businesses and bigger companies. As far as Ukrainian immigrants in Poland are concerned, the size of the employer firm had little impact on the median of wages earned by the immigrants who came before the war but did so in the case of the refugees (**Figure 21**). The median of the wages of the refugees employed by the smallest businesses (with a staff of 9 or less) was just over the minimum net living wage per month. The refugees working for other businesses earned nearly 20% more. This correlation did not apply to the pre-war migrants from Ukraine as the median of their wages was close to the median wage in the Polish economy regardless of the size of the employer.

Figure 21. Medians of wages of refugees and pre-war migrants by size of employer

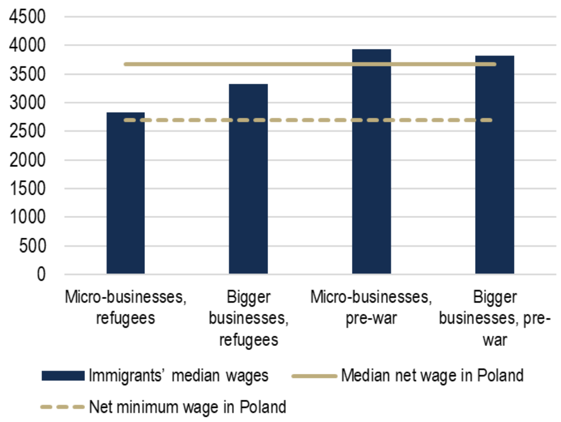
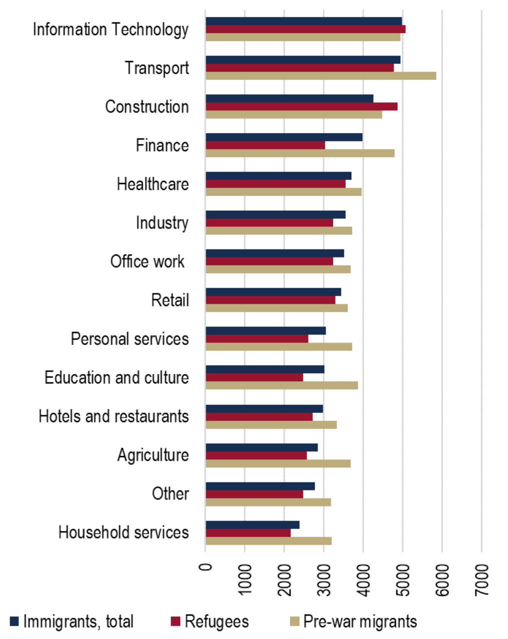


Figure 22. Median monthly earnings by sector in which the immigrants from Ukraine work in Poland



Wages earned by immigrants in Poland to a large extent depend on the sector they work in (**Figure 22**). The highest median wage was seen in the Information Technology sector and the wages of those who came to Poland before the war did not differ much from the wages earned by later migrants. Transport was the second sector in terms of wages, though in this case the people who had longer experience working in Poland were clearly better off than the refugees. A higher median wage of the earlier migrants was a rule in most of the sectors. On the other hand, the median wage of the refugees was a bit higher than that of the pre-war migrants in the construction sector, which may be the effect of higher or specific qualifications of the people working there who came to Poland in or after 2022. The generally lower median wage of the refugees than of the pre-war migrants probably reflected the shorter length of employment in the sector in Poland and the shorter time spent looking for a better match between their qualifications and the demands of the Polish labour market. The differences may also be linked with the prevalence of women among the refugees and the pay gap between male and female immigrants.

2.3. Family situation and labour market activity

The fact of having children and the composition of the household usually have a significant influence on decisions made by the household members concerning labour market activity. However, the immigrant survey results show that the typical patterns concerning the division of professional and family duties seen in Polish society[3] are not always obvious among the immigrants. For example, having a family or children in Poland was not a differentiating factor concerning labour market activity in the case of the pre-war migrants (**Figure 23**). On the other hand, the presence of family and children was very important in the case of the refugees. Whole families, though without children, were characterised by the most frequent occurrence of permanent employment. The refugees staying in Poland without children were also characterised by a relatively high percentage of employment. The presence of children in Poland, regardless of whether the spouse was present too, entailed slimmer chances of finding a job and higher unemployment, although, what should also be underlined, a relatively small percentage of those inactive in the labour market. People without a partner and children in Poland, but who had other relatives, were more often inactive and less often had steady jobs.

Figure 23. Family in Poland and labour market activity, pre-war migrants

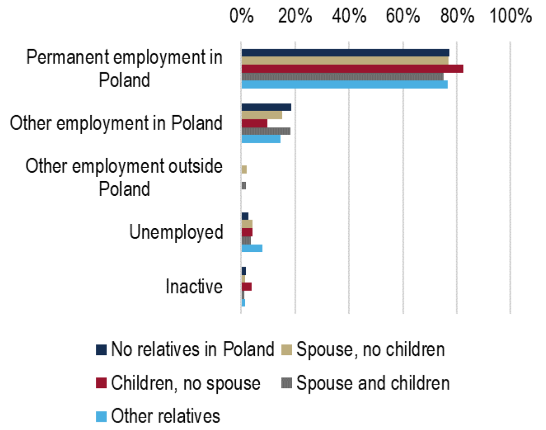
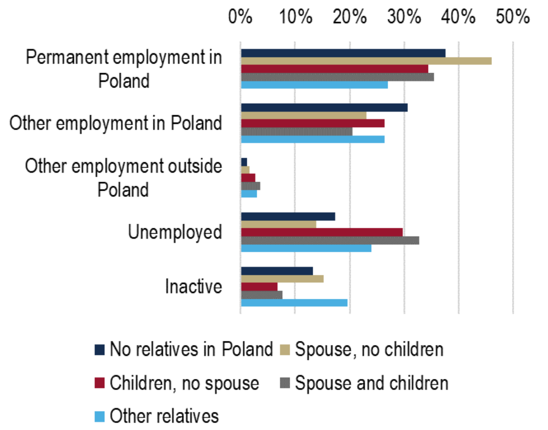


Figure 24. Family in Poland and labour market activity, refugees



[3] E.g.: https://pie.net.pl/wp-content/uploads/2022/12/Praca-a-dom.pdf

Figure 25. Number of children and labour market activity of all male immigrants

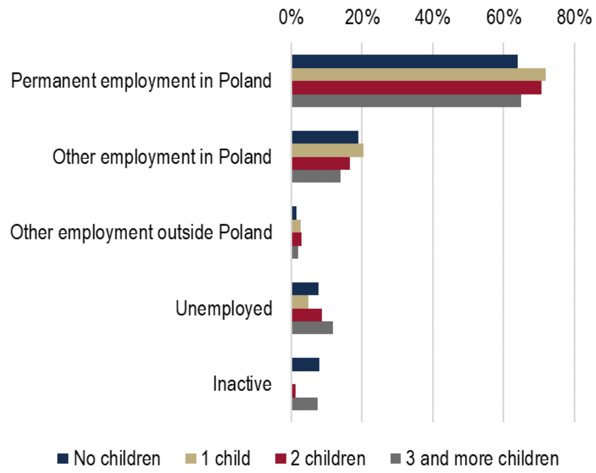
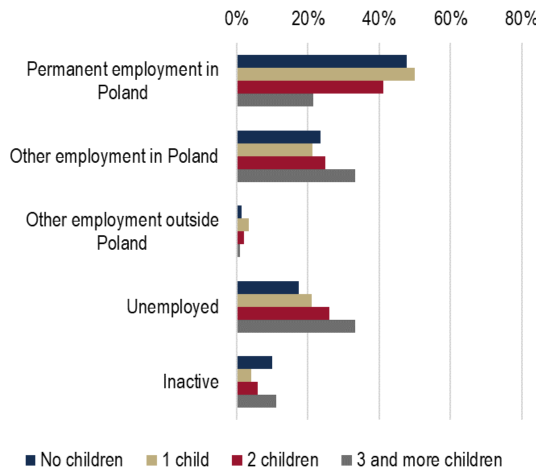


Figure 26. Number of children and labour market activity of all female immigrants



There is usually a negative correlation between the number of children in the family and labour market activity in the case of women, but the correlation is most often positive in the case of men. The immigrant survey data confirm these patterns. As far as female immigrants are concerned (**Figure 26**), the presence of a second and more children seriously reduced the percentage of those with a steady job; such women were in less stable employment, were unemployed or less active in the labour market. As far as male immigrants are concerned (**Figure 25**), the percentage of those with a steady job is the highest when they have 1-2 children in Poland. Fathers of families with three or more children in Poland are still characterised by a high labour market activity but are also visibly more often unemployed or not active in the labour market.

3. Economic situation of the immigrants

3.1. Income

Work is the principal source of income for the immigrants from Ukraine. As stated in Chapter 2, 94% of the pre-war migrants and over 62% of the refugees' work, though the nature of employment of the latter is less stable, they more often do casual or seasonal jobs or work part-time. Approximately 21% of the pre-war migrants earn a net salary of less than PLN 3,000, net, per month, whereas that percentage is more than twice as high in the case of the employed refugees, amounting to 48% (**Figure 18**), meaning that their economic situation is more difficult.

From 1 January 2023 to 1 July 2023, the minimum wage in Poland amounted to PLN 3,490, gross, or roughly PLN 2,709, net of tax. While the wages earned by the pre-war migrants are by and large above the minimum wage, nearly half of the refugees are paid salaries in the range of the minimum wage. The financial standing of the migrants is also affected by their family situation, because for a large group of the migrants, the salary is household income. Nearly half of the pre-war migrants in Poland say that they are staying in Poland with a spouse/partner. In the case of the refugees, it is 29%.

The budgets of some of the migrants are supplemented by Polish social benefits, which are used by 31% of the pre-war migrants and 53% of the refugees (**Figure 27**). The figures are smaller, especially in the case of the refugees, than reported after the November 2022 survey. The "Family 500+" child benefit is most often indicated. It is used by 44% of the refugees and 28% of the pre-war migrants. This means a 5pp. drop on November 2022 in the case of the pre-war migrants and 8 pp. drop in the case of the refugees. A small percentage of the respondents said that they received unemployment benefit. Approximately 3% of the migrants received a Polish pension **(Figure 28).**

Migrants are also entitled to in-kind aid in Poland. It is regularly used by 19% of the refugees and 5% of the pre-war migrants **(Figure 29).** Among those who regularly use in-kind aid in Poland, the percentage of over 60-year-olds is significantly higher than the percentage of users in the whole immigrant population. The percentage of users of in-kind aid grows with age.

Figure 27. Percentage of respondents using social benefits in Poland

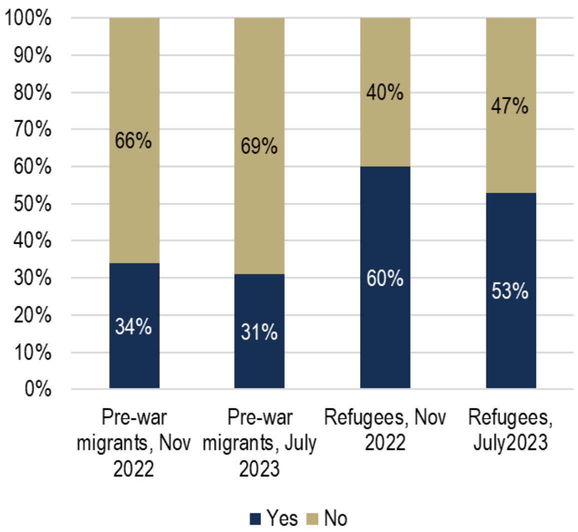
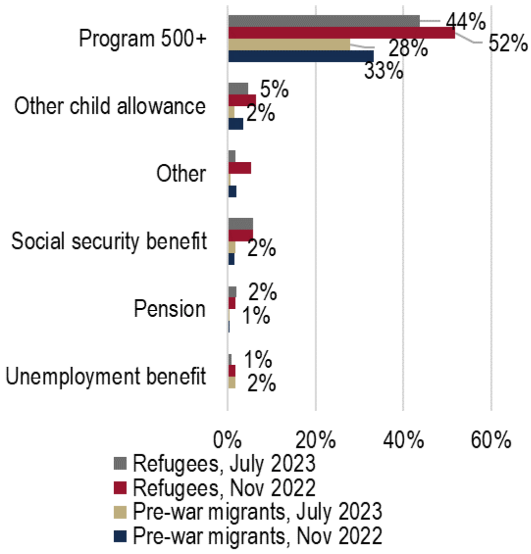
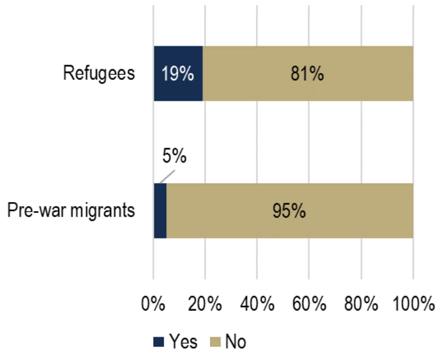


Figure 28. Kinds of social benefits received by respondents*



*More than one answer was allowed, the percentages do not add up to 100

Figure 29. Percentage of respondents regularly using in-kind aid in Poland



Money received from Ukraine is another source of income, primarily for the refugees. 34% of the surveyed refugees and 8% of the pre-war migrants admit to receiving money from Ukraine **(Figure 30).** In most cases, the source of income of the refugees is financial aid from relatives in Ukraine and Ukrainian pension. Refugees aged over 60 most often benefit from financial aid from Ukraine (over 60% of them) and it is mainly pension and disability allowances from Ukraine. On the other hand, the youngest refugees, aged 18-26, and those aged 27-44 receive financial aid from relatives in Ukraine more often than other age groups. More than a half of the immigrants receive monthly payments of up to PLN 500 **(Figure 31).**

Figure 30. Percentage of Ukrainian migrants receiving money from Ukraine

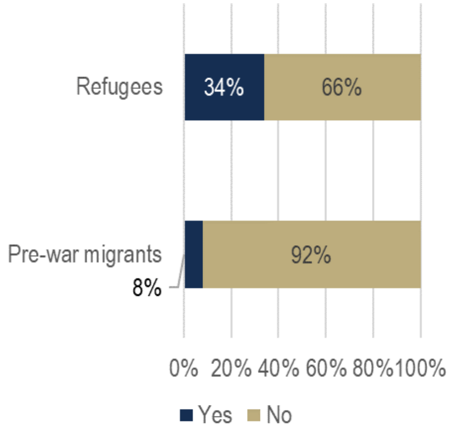
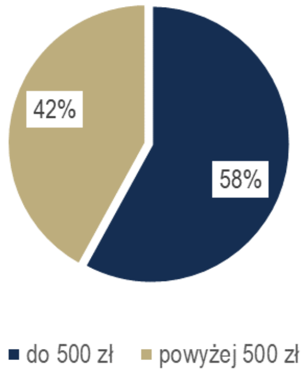
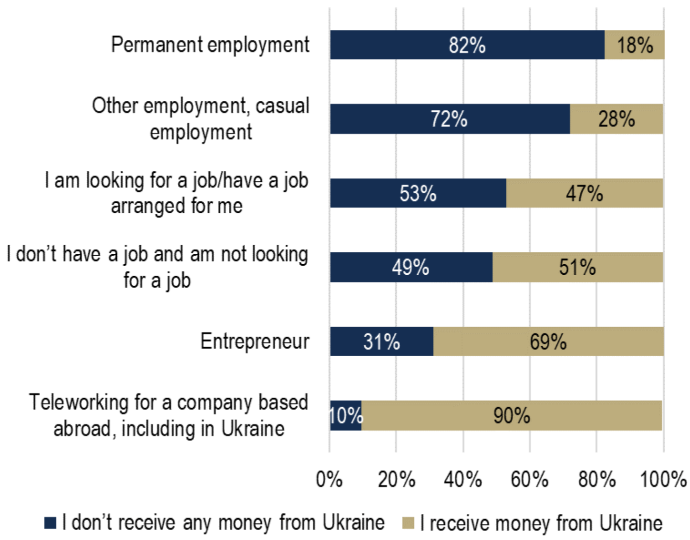


Figure 31. Average monthly financial aid received by Ukrainian migrants



The use of funds from Ukraine by the refugees is correlated with their status in the labour market in Poland (**Figure 32**). Those with a steady job in Poland (18%) or in other employment, including casual employment (28%) receive financial aid least often. Money from Ukraine, mainly salaries, is received in most cases by people teleworking for companies based abroad, including in Ukraine (90%) and sole proprietors operating in Poland (69%), who mainly use their money held in the bank in Ukraine.

Figure 32. Percentage of the refugees using money from Ukraine broken down by labour market status[4]



Nearly 51% of those who are economically inactive support themselves with money from Ukraine, mainly pensions and disability allowances. Also, 47% of job seekers benefit from

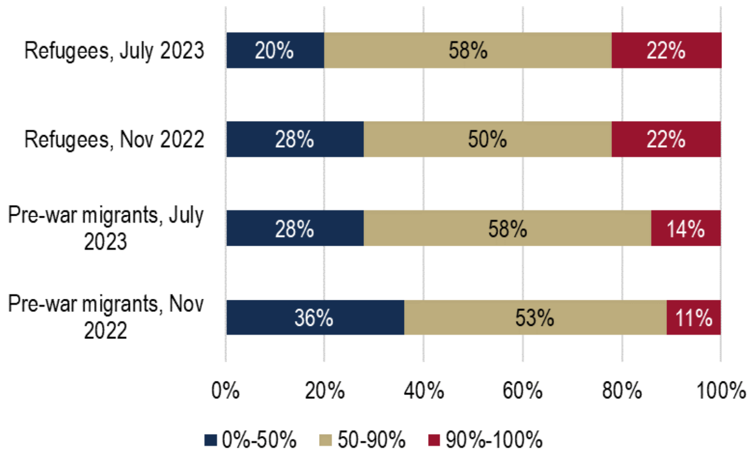
[4] 36% of the refugees have steady jobs, 22% are in other employment, including casual employment, 26% are looking for a job or have a job arranged for them, 12% do not have and are not looking for a job, 2% are sole proprietors and 2% telework.

financial aid from Ukraine. It mostly comprises remittances from relatives, as well as pensions and disability allowances. About 50% of the pensions and disability allowances from Ukraine amount to PLN 500 or less per month.

3.2. Expenses

An analysis of the answers to the question about the living expenses as a percentage of the wage earned in Poland shows that compared to 2022, the percentage of the respondents who spend most of their wages on current needs has grown **(Figure 33).** 72% of the pre-war migrants spend more than 50% of their wages on current needs (64% in November 2022) and so do 80% of the refugees (72% in November 2022). 22% of the refugees and 14% of the pre-war migrants spend 90-100% of their income on living needs. A reason for this may be the increase in living expenses, resulting, for example, from higher costs of renting a flat. However, the results may have been affected by methodological issues related to the survey, especially in the case of the refugees.

Figure 33. Living expenses as a percentage of the average monthly net salary[5]



The cost of accommodation is one of the key living expenses. The results of the survey in this area are affected by the prolonging stay in Poland of the refugees, changes in the law implemented in 2023, significantly reducing the possibility of staying for free in places of collective accommodation (sports halls, hotels, etc.) and costs of renting a flat. The percentage of the refugees renting a flat on their own has grown visibly since the 2022 survey (from 52% to 68%). On the other hand, the percentage of the refugees living in places of collective accommodation has dropped (from 19% to 6%) **(Figure 34).** As far as the pre-war migrants are

[5] The figure includes migrants who work. In the 2023 survey, the question was rephrased. In the November 2022 survey, the question was: What part of your average monthly net income do you spend on living expenses? In the 2023 survey, the notion of "net income" was narrowed down to the salary earned in Poland.

concerned, 76% say they are renting a flat and 8% own a flat. According to the survey, 90% of the pre-war migrants and 77% of the refugees pay for the flat **(Figure 35)**.

Figure 34. Housing situation of Ukrainian migrants

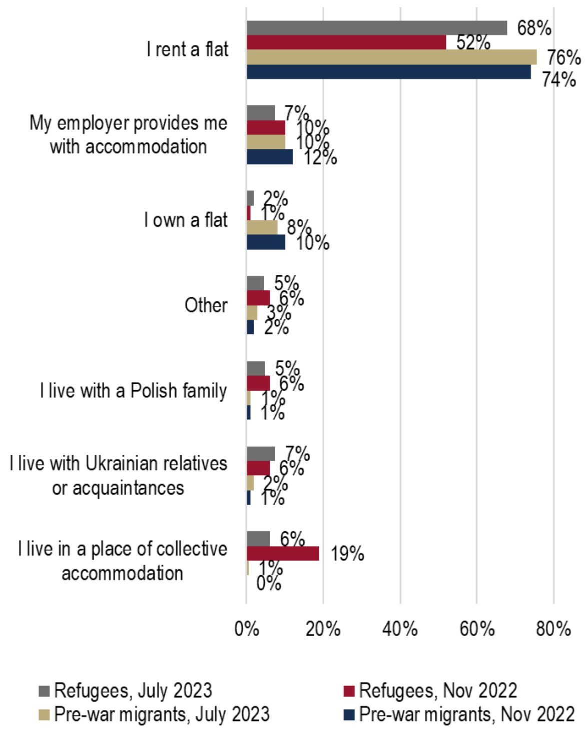
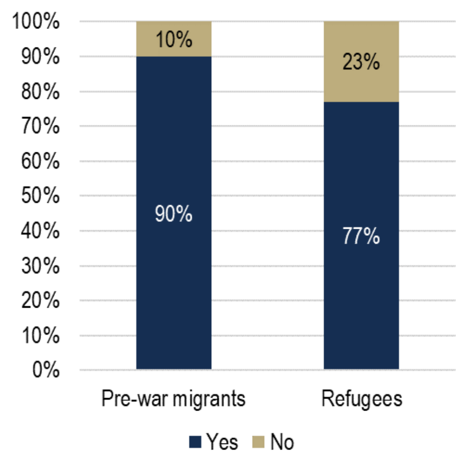


Figure 35. Ukrainian migrants according to whether they pay for accommodation

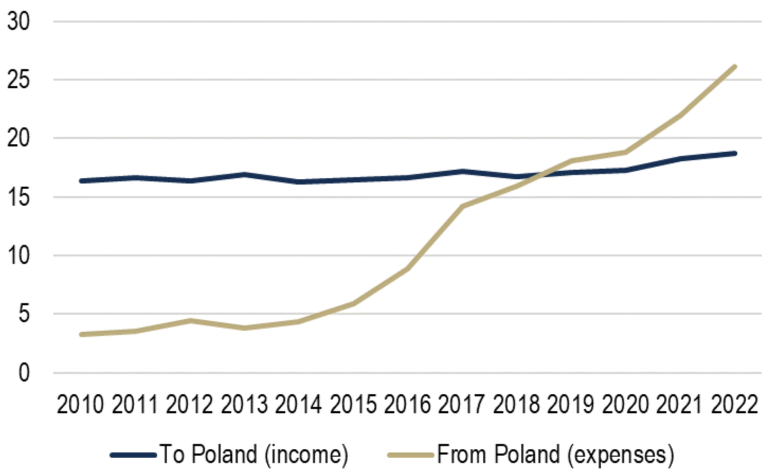


The housing situation of the migrants depends on their family situation. The situation of the pre-war migrants with a partner or a partner and children is more stable. Over 90% of the respondents in both groups rent or own a flat. People who do not have relatives in Poland more often use accommodation arranged by the employer (19%). There is a similar relationship in the case of the refugees. Those with a partner or a partner and children much more often rent or own a flat (76% and 80% of them do, respectively). 17% of the respondents without relatives live in accommodation arranged by the employer. People without a partner and children most often live in places of collective accommodation for refugees (18% of them do).

4. Funds and in-kind aid for Ukraine

The survey made it possible to analyse once again the important issue of remittances from Poland by immigrants. Remittances by Ukrainian citizens account for about 70% of the money remitted by all the immigrants from Poland. As far as amounts are concerned, remittances abroad were lower than remittances to Poland by Poles living abroad until 2017. After reaching an equal value in 2018, remittances to Ukraine are now significantly higher **(Figure 36).**

Figure 36. Migrants' remittances in the balance of payments



In peacetime, the money is often earmarked for supporting the family staying in the home country, building up savings, repaying debts or improvements in the home, financing one's business, etc. During the war, the funds are often the key source of income for the people staying there. The importance of in-kind aid is also growing due to the shortages of goods in the war-torn country and thus often higher prices.

The study showed that 61% of the pre-war migrants and 32% of the refugees send remittances abroad, which is a similar percentage to the one recorded in the November 2022 study, although with a slight upward trend in the case of the refugees and a downward trend in the case of the pre-war migrants **(Figure 37)**.

However, the frequency of remittances has decreased compared to the November 2022 study, especially in the case of the refugees. Still the biggest percentage of the respondents remitting money to Ukraine say that they do so at least once a month (48% of the pre-war migrants and 46% of the refugees), but the percentage of the refugees saying they made remittances very rarely has grown from 19% to 32% **(Figure 38).** To a certain extent, this may have resulted from the increase in the living expenses in Poland and the expenditure of a larger portion of the salary on sustenance, including accommodation.

Figure 37. Percentage of respondents making remittances to Ukraine

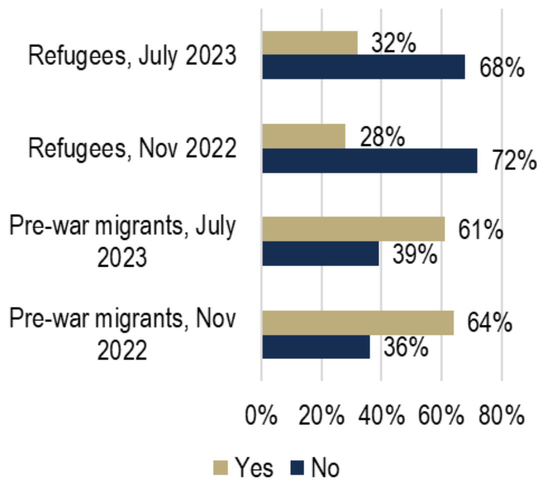
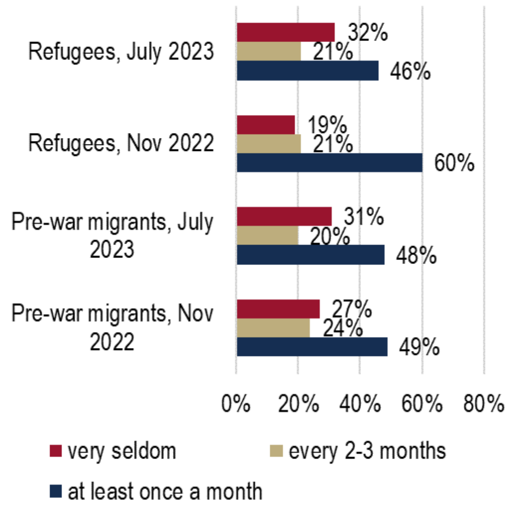


Figure 38. Frequency of remittances to Ukraine



As far as the amount of a remittance is concerned, over 80% of the respondents remit no more than PLN 1,000 on any single occasion **(Figure 39).** Remittances are most often addressed to the closest family who remained in Ukraine (77% of the refugees and 84% of the pre-war migrants said so). Just over 20% of the respondents from both groups remitted money to charities **(Figure 40).**

Figure 39. Amount of last remittance

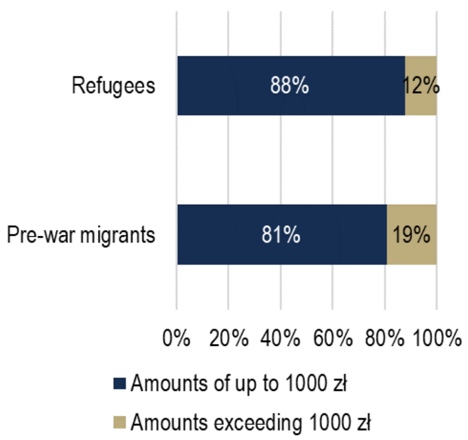
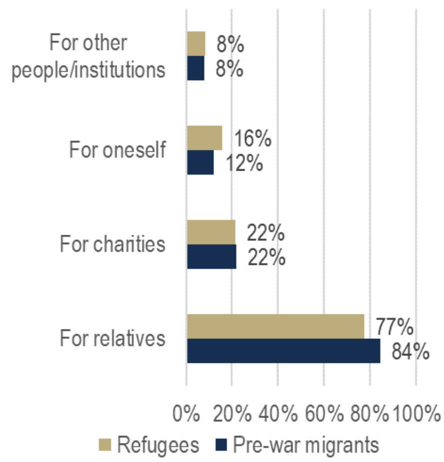


Figure 40. Beneficiaries of remittances (More than one answer was acceptable, the results do not add up to 100)



Migrants from Ukraine also transfer in-kind aid for Ukraine. 35% of the refugees and 53% of the pre-war migrants declare that (**Figure 41).** The percentage of the refugees who provide aid increased (by 5pp), as was the case of financial aid. The trend is the reverse (downward) as far as the pre-war migrants are concerned. In-kind aid is most often provided for the closest family (73% of the pre-war migrants and 66% of the refugees identify the beneficiaries of their aid this way), but a significant percentage of the respondents who send in-kind aid to

Ukraine also address it to charities (38% of the pre-war migrants and 45% of the refugees) **(Figure 42).**

Figure 41. Percentage of respondents sending in-kind aid to Ukraine

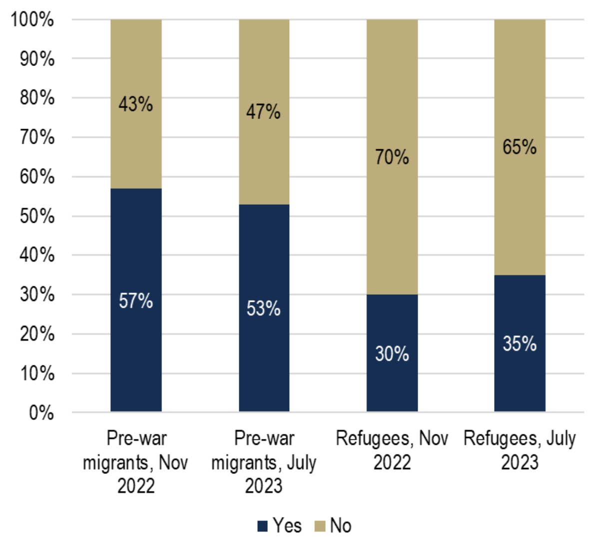
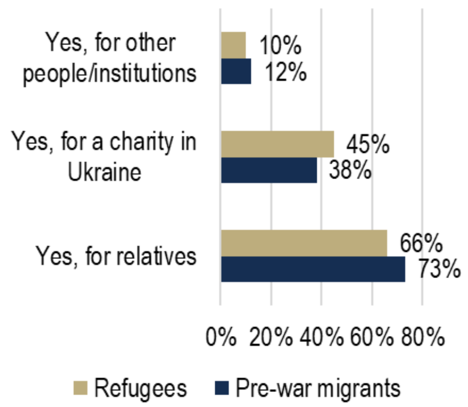


Figure 42. Beneficiaries of in-kind aid in Ukraine*



*More than one answer was allowed, the percentages do not add up to 100%

The inclination to make remittances and send in-kind aid is naturally correlated with the percentage of income spent on living expenses. The bigger the part of income earned in Poland spent on living, the more responses that no remittances or transfers are made to Ukraine.

The situation in the labour market is another factor affecting the inclination to make remittances and transfers of in-kind aid. People with jobs remit money to Ukraine much more frequently than the jobless. However, the nature of employment also matters. As far as the pre-war migrants are concerned, those in permanent employment make remittances most often, and they account for 77% of all the pre-war migrants **(**Figure **43**). The jobless, whether looking for jobs and those inactive in the labour market, i.e. who do not have a job and are not looking for one, make the least remittances (6% of all). In the case of the refugees, the most frequent remitters are sole proprietors and those in permanent employment (38% of all the refugees) **(Figure 44).** Those who are economically inactive and those who telework made remittances the least often (16% of all the refugees).

Figure 43. Pre-war migrants – percentage of respondents making remittances to Ukraine depending on labour market status[6]

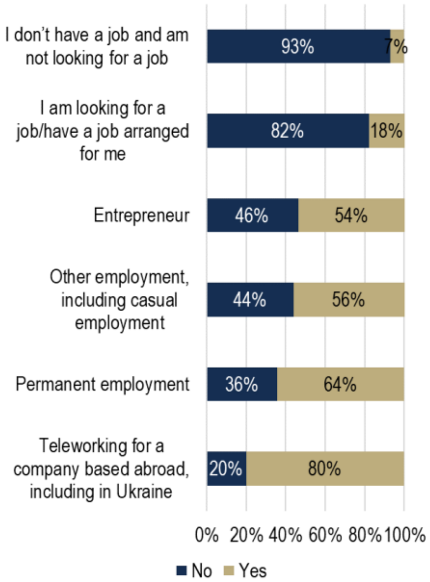


Figure 44. Refugees – percentage of respondents making remittances to Ukraine depending on labour market status

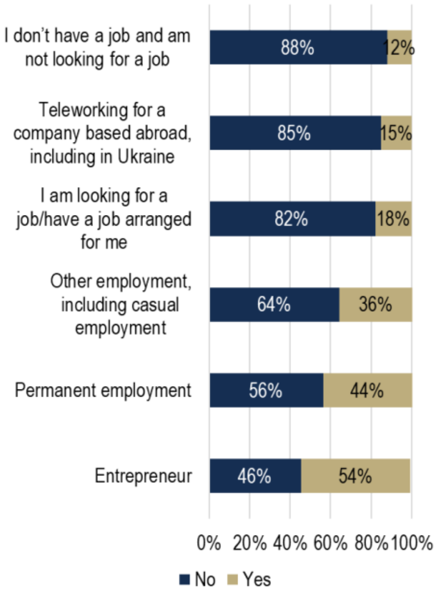


Figure 45. Pre-war migrants - percentage of respondents sending in-kind aid to Ukraine depending on labour market status

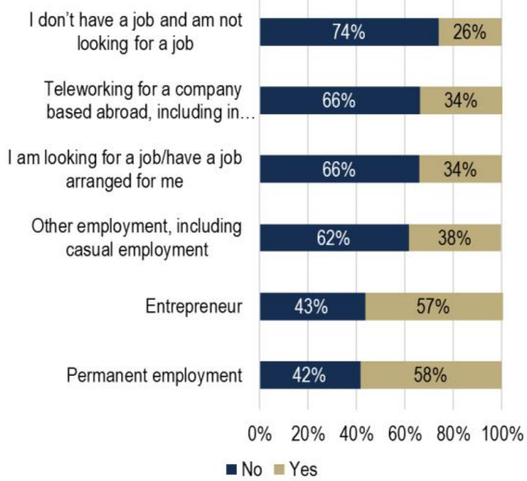
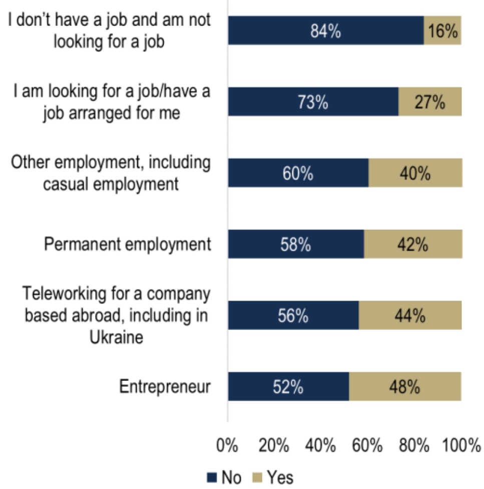


Figure 46. Refugees - percentage of respondents sending in-kind aid to Ukraine depending on labour market status



As in the case of remittances, people in permanent employment send in-kind aid to Ukraine much more often **(Figure 45, Figure 46)**. As far as the pre-war migrants are concerned, these are mainly people in permanent employment or sole proprietors (altogether, they account for 81% of all the pre-war migrants). Regarding the refugees, in-kind aid is most often sent

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[6] The population of teleworking pre-war migrants who answered the question about remittances abroad (money remittances and in-kind aid transfers) is so small that it is difficult to draw any conclusions on their behaviour in this round of the survey. It has been presented separately to ensure comparability with the population of the refugees, where a much bigger percentage of teleworkers answered the question about remittances.

by people teleworking for a company based abroad, sole proprietors and those in permanent employment (altogether 40% of the refugees).

Considering in-kind aid from the point of view of the region of migrant's origin, it turns out that pre-war migrants from central (60%) and western (58%) Ukraine most frequently send in-kind aid **(Figure 47).** Those coming from eastern (47%) and northern (49%) Ukraine do so least often. Among the refugees, such form of aid is preferred by respondents from western (38%), central (35%) and northern (37%) Ukraine. Those from eastern and southern Ukraine engaged in it considerably less often **(Figure 48).**

Figure 47. Pre-war migrants – inclination to send in-kind aid to Ukraine depending on the region of origin

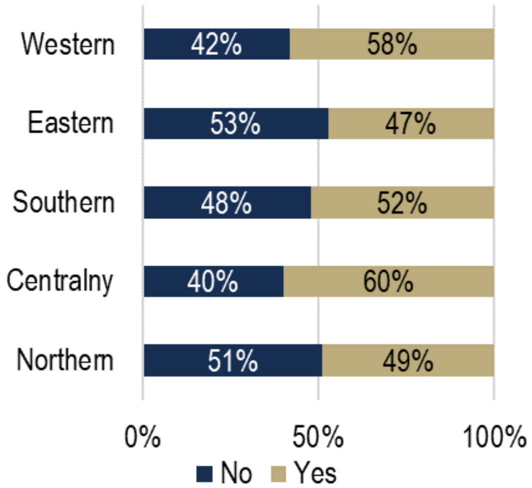
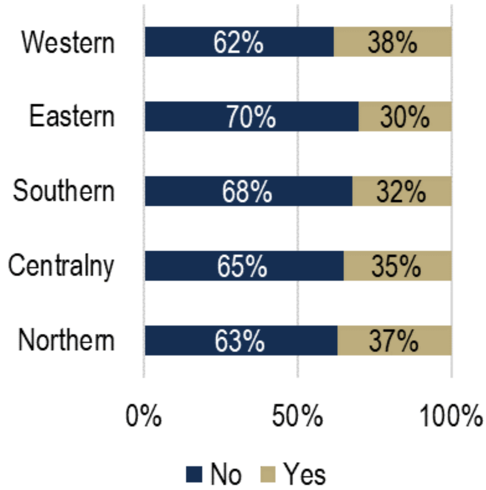


Figure 48. Refugees – inclination to send in-kind aid to Ukraine depending on the region of origin



5. Immigrants' future plans

5.1. Declarations by the immigrants concerning their future stay in Poland

The survey demonstrated that 61% of the pre-war migrants and 39% of the refugees declared they would stay in Poland permanently or longer than a year **(Figure 49).** As far as the pre-war migrants are concerned, the number of declarations concerning permanent stay has decreased by 7 pp., but it increased slightly among the refugees. The percentage of those who wish to leave Poland for another country, other than Ukraine, remained negligible. Also, a small percentage of the respondents assume that their stay in Poland will be shorter than a year and that they will return to Ukraine. There has been a visible decrease in the number of the refugees claiming they will return to Ukraine within a year. Big uncertainty prevails among the refugees. More than a half are unable to say how long they will stay in Poland. Among the pre-war migrants, the percentage of answers "hard to say" is 36% and is 7 pp. higher than in the November 2022 study. It would seem that the end of the war is the key factor determining the refugees' decisions about the future. 51% of the refugees declare that if the war ended soon, they would return to Ukraine within 3 months, which is a slightly lower percentage than in 2022 (56%). As far as the pre-war migrants are concerned, such declarations were made by 25% of the respondents – the same percentage as in November 2022 **(Figure 50).** They are probably the ones who find it the hardest to get used to living in Poland.

Figure 49. Planned continued stay in Poland

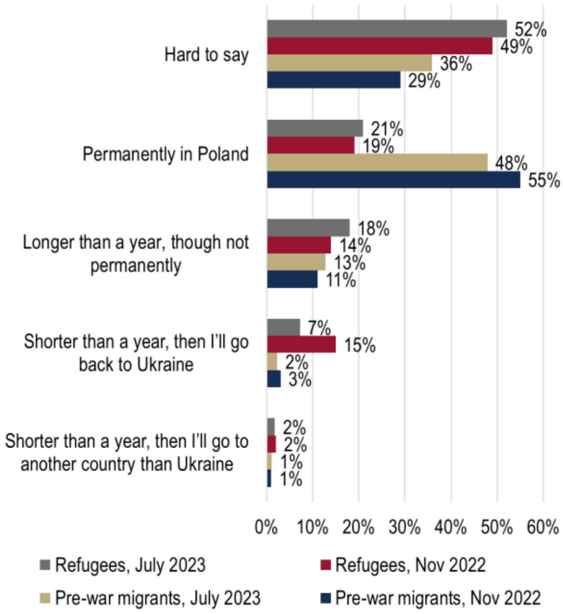
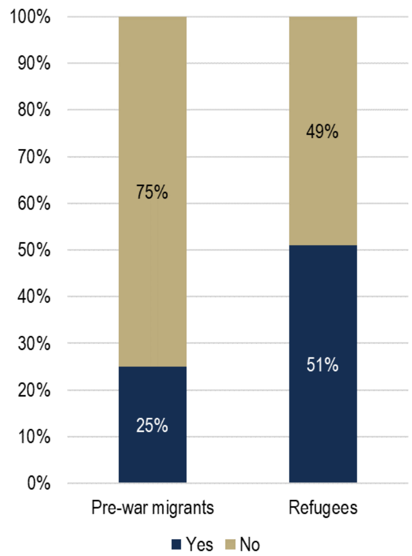


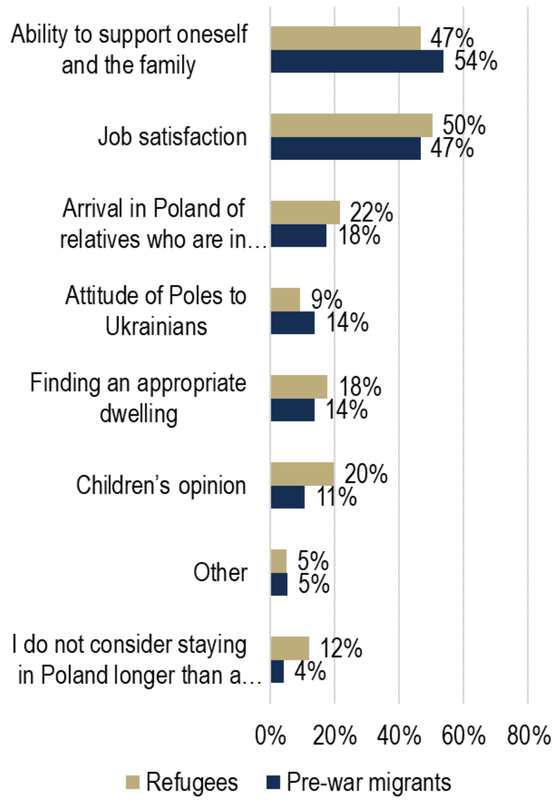
Figure 50. Declared readiness to return to Ukraine within 3 months if the war ended soon



5.2. Factors influencing the Ukrainian migrants' plans concerning the continued stay in Poland

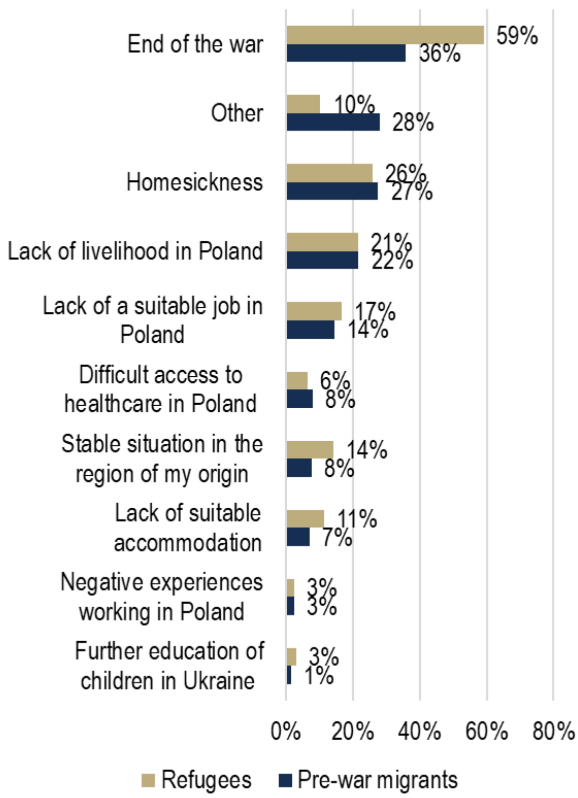
The analysis of the responses to the questions concerning the factors affecting the decision to stay in Poland for longer than one year or to return to Ukraine shows that as far as the refugees are concerned, the end of the war is the key factor on which their decision to return to Ukraine depends, as mentioned above (**Figure 52**). 59% of the respondents said so, as did 36% of the surveyed pre-war migrants. Homesickness was the second factor most frequently mentioned by both groups (26% and 27% of the responses, respectively), followed by the lack of livelihood in Poland (21% and 22%, respectively). The key factors underlying the decision to stay in Poland are economic in nature and were mentioned by about 50% of the respondents in both groups of the migrants. They are, first of all, the ability to support oneself and the family, and job satisfaction **(Figure 51).** It should also be noted that only 12% of the refugees and 4% of the pre-war migrants do not consider staying in Poland for longer than a year.

Figure 51. Factors influencing or potentially influencing the Ukrainian migrants' decisions to stay in Poland longer than one year*



Maximum 3 answers were allowed. The results do not add up to 100

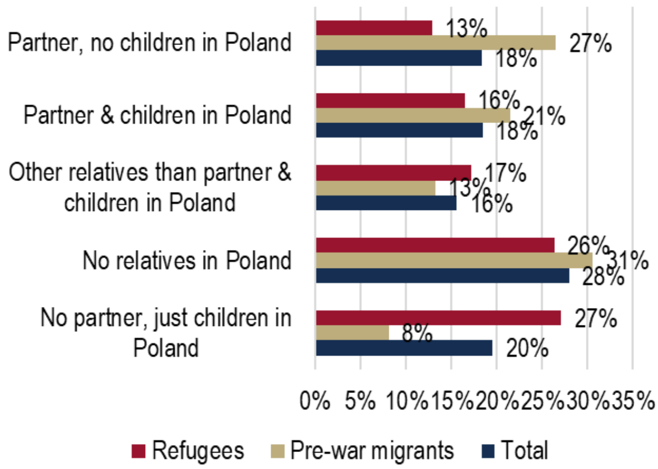
Figure 52. Factors influencing or potentially influencing the Ukrainian migrants' decisions to return to Ukraine



Maximum 3 answers were allowed. The results do not add up to 100

The analysis of the responses by the Ukrainian migrants to the questions concerning the expected length of stay in Poland depending on their family situation in Poland (whether their relatives are staying with them in Poland) shows that the factor does affect their plans. The most numerous group of migrants from Ukraine are those who are staying in Poland without their families (in total 28% of the respondents). This group is also the most numerous among the pre-war migrants (31%). The biggest group of the refugees are people without a partner but with underage children (27%). **(Figure 53)**.

Figure 53. Family situation of the migrants from Ukraine in Poland



As far as the pre-war migrants are concerned, the vast majority of the respondents who have a partner and children in Poland plan their future in Poland **(Figure 54).** 73%plan to stay in Poland permanently, and 6% longer than one year, but not permanently. On the other hand, those who do not have relatives in Poland least often said that they planned to stay in Poland permanently or longer than one year (47%). They are also characterised by the highest level of uncertainty concerning their future in Poland (all in all 47% answered "hard to say"). Answers about the return to Ukraine within one year are very rare, but were most often given by the respondents with children but without a partner in Poland (4%).

Regarding the refugees, similarly to the pre-war migrants, the respondents whose partner and children are staying in Poland much more often declare their intention to stay in Poland longer, that is to say 30% are planning to stay in Poland permanently whereas 19% plan to stay longer than one year, but not permanently (**Figure 55)**. The percentage of such answers given by the other groups of migrants identified based on their family situation is similar. The highest level of uncertainty about the future is among the people who are staying in Poland with other relatives than the partner and children. In turn, most often people without any relatives in Poland intend to leave Poland within one year (12% in total).

Figure 54. Pre-war migrants – expected length of stay in Poland depending on the family situation in Poland

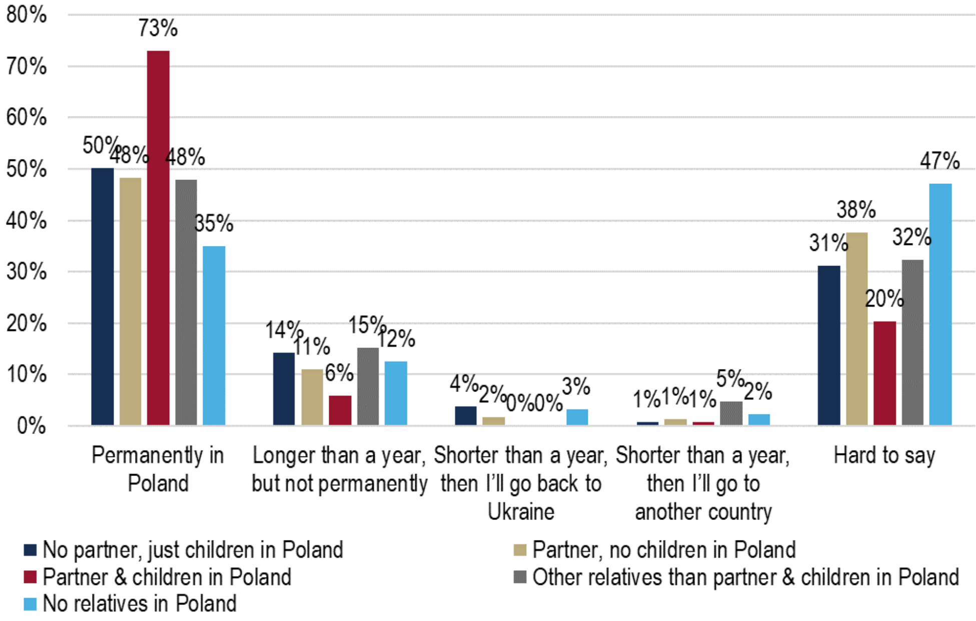
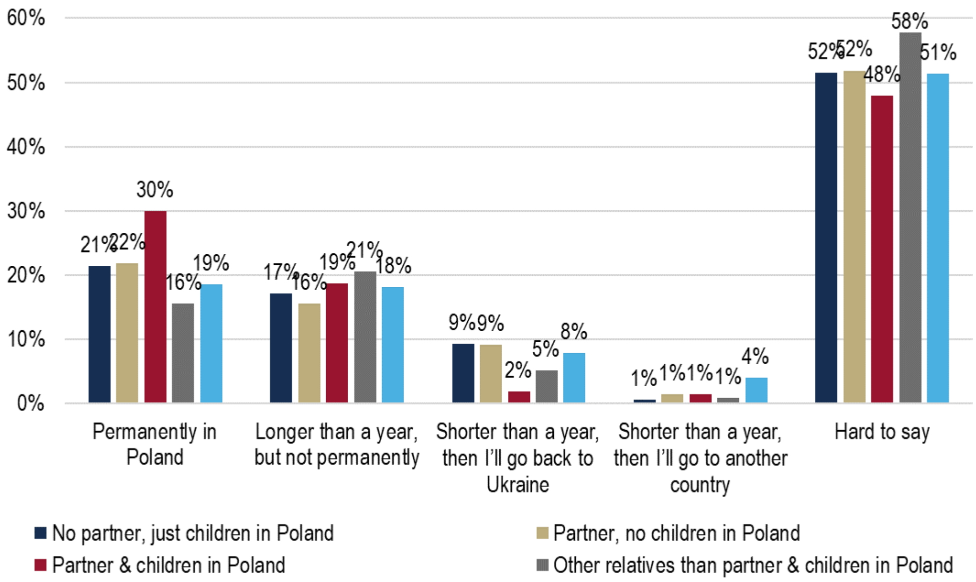


Figure 55. Refugees – expected length of stay in Poland depending on the family situation in Poland



The analysis of the Ukrainian migrants' plans if the war ended soon, depending on their family situation in Poland, confirms that families with children considered returning to Ukraine least often (10% of the pre-war migrants and 40% of the refugees). Conversely, respondents in both groups who do not have families most often declared their intention to return to Ukraine quickly.

As mentioned above, economic factors influence the migrants' plans concerning their future in Poland. These factors include having a job and a flat. Among the pre-war migrants, the lowest percentage of responses concerning the return to Ukraine if the war ended soon was given by sole proprietors doing business in Poland (13%) or people in permanent employment (22%) **(Figure 56).** People without a job or doing casual jobs are much more inclined to return to Ukraine (approx. 40% of the responses). Those without a job and not looking for one (economically inactive) less often declare their intention to return to Ukraine (29%), which proves that their life situation is relatively stable, in spite of being unemployed. The situation is somewhat different in the case of the refugees **(Figure 57**). Sole proprietors and those in permanent employment least often declared their intention to return to Ukraine quickly (36% and 43% of the responses, respectively). Also those without a job but looking for a steady job less often declared their intention to return to Ukraine (43%). In turn, those who are economically inactive more often want to return to Ukraine (62%), which proves that their life situation in Poland is more difficult. The most numerous age group among these people is over 60-year-olds.

Figure 56. Pre-war migrants – inclination to return to Ukraine within 3 months if the war ends soon, depending on the labour market situation[7]

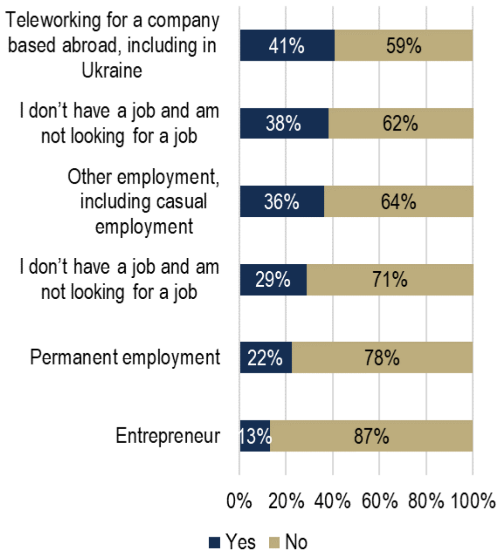
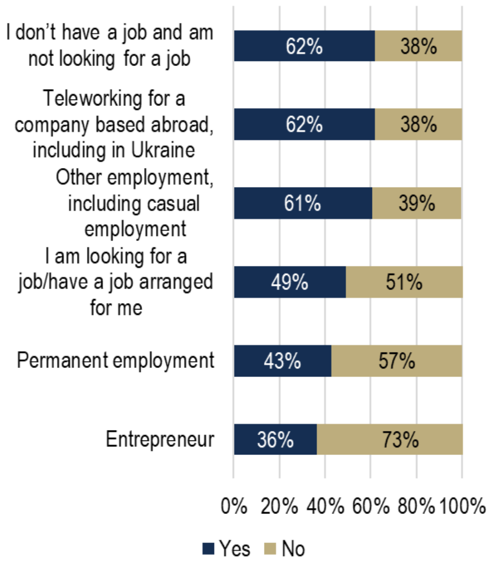


Figure 57. Refugees – inclination to return to Ukraine within 3 months if the war ends soon, depending on the labour market situation



Housing conditions undoubtedly stabilise the life situation of the migrants, reflect the level of independence and influence their future plans **(Figure 58, Figure 59**). The pre-war migrants and the refugees who own a flat in Poland are the least inclined to return to Ukraine soon (13% and 37%, respectively), followed by those who rent one (23% and 45%,

[7] The population of teleworking pre-war migrants who answered this question is so small that it is difficult to draw any conclusions on their behaviour in this round of the survey. It has been presented separately to ensure comparability with the population of the refugees, where a much bigger percentage of teleworkers answered this question.

respectively). The most inclined are people living in employer-arranged accommodation (43% and 66%, respectively) or in places of collective accommodation (67% and 65%, respectively).

Figure 58. Pre-war migrants – inclination to return to Ukraine within 3 months if the war ends soon, depending on how housing needs are satisfied[8]

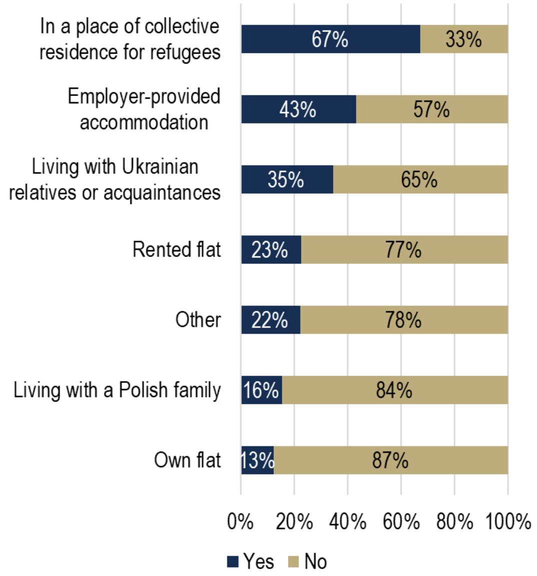
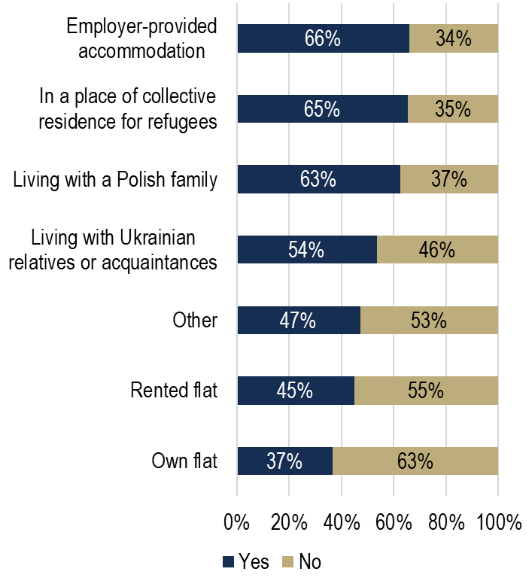


Figure 59. Refugees – inclination to return to Ukraine within 3 months if the war ends soon, depending on how housing needs are satisfied



The region of the migrants' origin in Ukraine influences their plans concerning their continued stay in Poland to a certain extent **(Figure 60, Figure 61)**. More pre-war migrants from western Ukraine (30%) declare their intention to return to Ukraine quickly if the war ends soon than those from other regions. Migrants from eastern and southern Ukraine, which are areas of the fiercest hostilities, are the least inclined to return quickly. As far as the refugees are concerned, the least inclined to return quickly are refugees from western and central Ukraine (45% of each), the most inclined are those originating from southern Ukraine (58%). When asked how long they would stay in Poland, pre-war migrants from western Ukraine least often said they intended to stay in Poland permanently (38%), which may be connected with the geographical proximity of those areas and with the fact that that is the region of Ukraine which has suffered the least during the war. What may be a relevant factor is that before the war, migration from western Ukraine was by and large circular. Over 50% of the pre-war migrants from other regions of Ukraine declared their intention to stay in Poland permanently. Concerning the refugees, the biggest percentage of those that declare their intention to stay in Poland permanently are refugees from western Ukraine (25%), which is the reverse trend to that of pre-war migrants.

[8] Only 1% of the pre-war migrants are living with a Polish family and 1% in a place of collective accommodation.

Figure 60. Pre-war migrants – inclination to return to Ukraine within 3 months if the war ends soon, depending on the region of origin

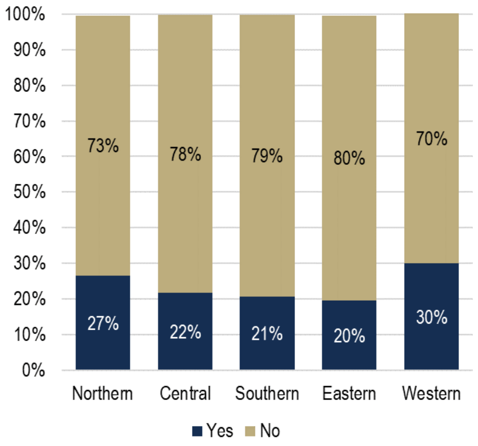
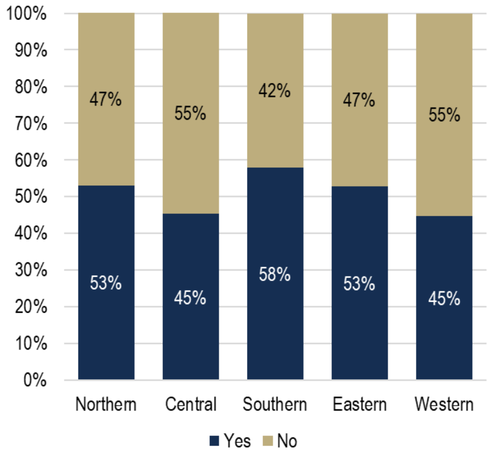


Figure 61. Refugees – inclination to return to Ukraine within 3 months if the war ends soon, depending on the region of origin



Further information about the social and demographic features of the people intending to stay in Poland or leave Poland is provided by the answers of the respondents depending on their age (**Figure 62, Figure 63**).

Figure 62. Pre-war migrants – inclination to return to Ukraine within 3 months if the war ends soon, depending on age

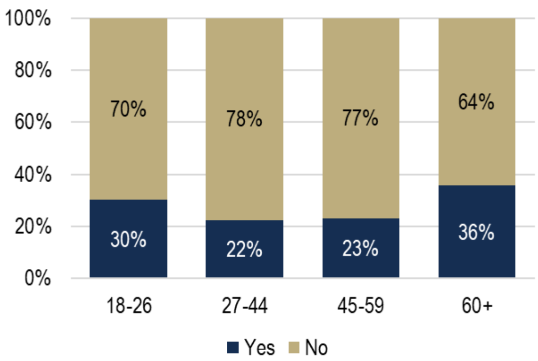
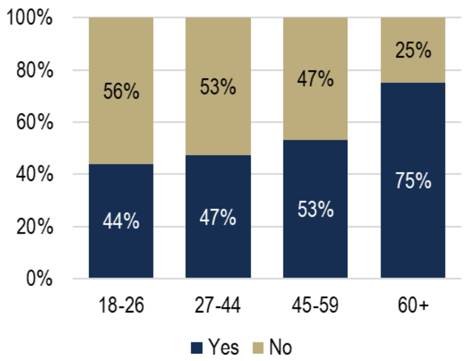


Figure 63. Refugees – inclination to return to Ukraine within 3 months if the war ends soon, depending on age

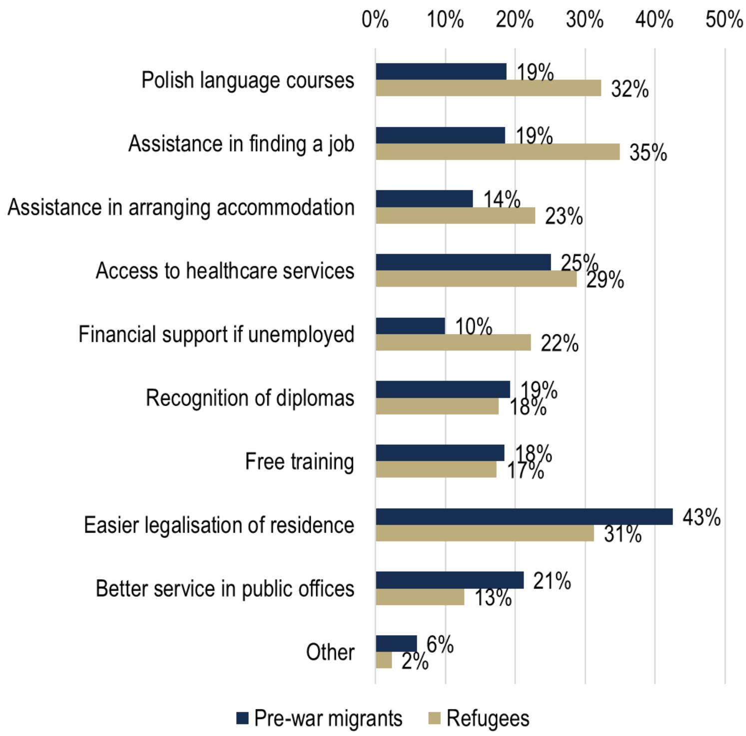


Regardless of whether they were pre-war migrants or refugees, the oldest people, over 60 years of age, were the ones who most often declared that they would return to Ukraine quickly if the war ended soon (36% and 75% of positive answers, respectively). As far as refugees are concerned, the percentage of responses indicating the intention to return quickly rises with age. No such trend can be seen among pre-war migrants.

5.3. Expectations concerning state assistance from Poland

In order to better illustrate the economic and life situation of the migrants and to evaluate the chances for them fulfilling their plans, one should consider their expectations concerning state assistance from Poland. There has been a significant decrease in the percentage of people expecting the arrangement of Polish language courses compared to the previous rounds of the survey, which is reflected in the declarations concerning the level of competence in Polish, particularly among the refugees. In the present survey 32% of the refugees (vs. 43% in November 2022) and 19% of the pre-war migrants (vs. 27% in November 2022) expected the organisation of Polish language courses (**Figure 64**).

Figure 64. The most important forms of assistance that would facilitate the stay in Poland for migrants from Ukraine



*Maximum 3 answers were allowed. The results do not add up to 100

The most desirable forms of assistance for the pre-war migrants, according to the number of responses are as follows: easier legalisation of residence, access to healthcare, better service at public offices. The hierarchy of needs is a little different in the case of refugees. The biggest percentage of the respondents expected assistance in finding a job, followed by the organisation of Polish language courses and easier legalisation of residence. What seems important for the evaluation of the economic and life situation of the migrants is the indication of the three categories of expected assistance: assistance in finding a job, financial aid, if they are out of work and assistance in getting accommodation. There was a considerably bigger number of indications of these areas among the refugees, which is reflected in the results of the survey concerning employment and place of residence. The percentage of indications in the respective categories by pre-war migrants remains relatively low.

6. Selected elements of regional diversification of migrants from Ukraine in Poland

The migrants from Ukraine staying in Poland come from all of the regions of Ukraine. Pre-war migrants more often come from western and central Ukraine. The migrants settled in all the voivodeships, but in different proportions. Pre-war migrants from western Ukraine account for at least half of the migrants in the voivodeships of eastern Poland, i.e. the Lubelskie, Świętokrzyskie and Podkarpackie Voivodeships (**Figure 65).** The largest group of migrants from central Ukraine lives in the Dolnośląskie, Lubuskie and Kujawsko-Pomorskie Voivodeships. As far as the refugees are concerned, they are more evenly distributed across all the voivodeships, although in the Lubelskie and Kujawsko-Pomorskie Voivodeships the biggest percentage (over 50%) of the refugees come from the regions which were or are the scenes of the most fierce hostilities, that is eastern and southern Ukraine **(Figure 66).**

Figure 65. Pre-war migrants from Ukraine according to the region of origin and voivodeship where they currently live in Poland

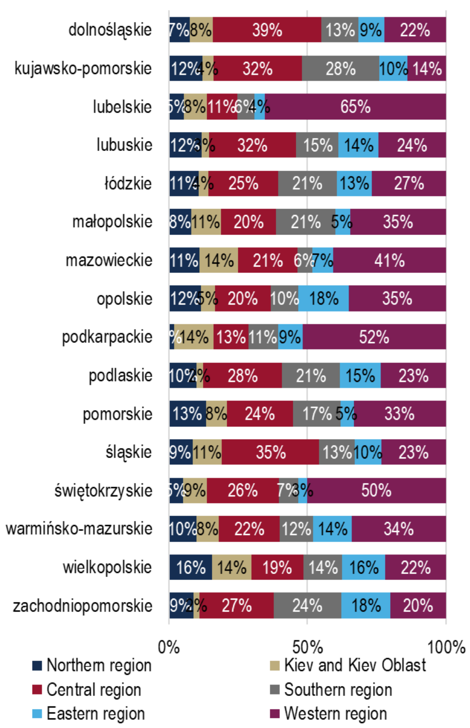
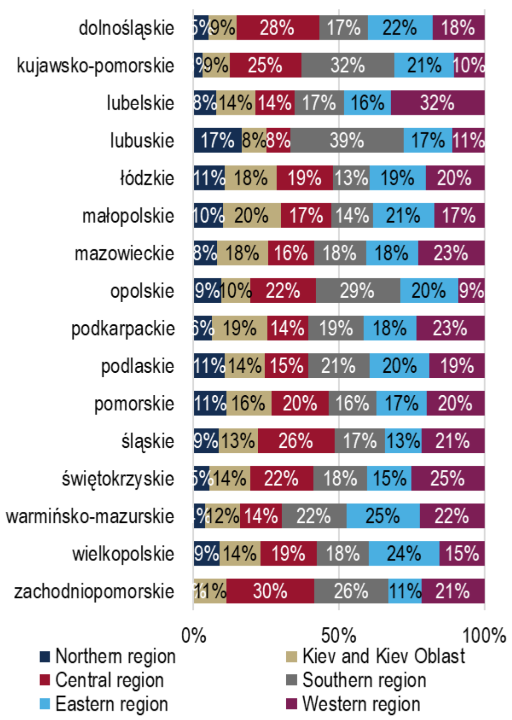


Figure 66. Refugees from Ukraine according to the region of origin and voivodeship where they currently live in Poland



As discussed in Chapter 1, migrants from Ukraine are staying in Poland with members of their closest family. It turns out, however, that their family situation differs markedly depending on the voivodeship in which they reside **(Figure 67, Figure 68).** The biggest percentage of pre-war migrants who came to Poland without the family are located in the

Warmińsko-Mazurskie, Lubelskie and Pomorskie Voivodeships. The pre-war migrants staying in the Dolnośląskie and Kujawsko-Pomorskie Voivodeships are least likely to declare having no family in Poland. The biggest percentage of the respondents declaring that they have a partner/husband and children is seen in the Zachodniopomorskie, Świętokrzyskie, and Wielkopolskie Voivodeships. The smallest percentage of families with children are living in the Lubelskie Voivodeship, whereas the Świętokrzyskie Voivodeship is the place of residence of the biggest percentage of single parents.

Figure 67. Pre-war migrants – family situation in Poland according to voivodeship

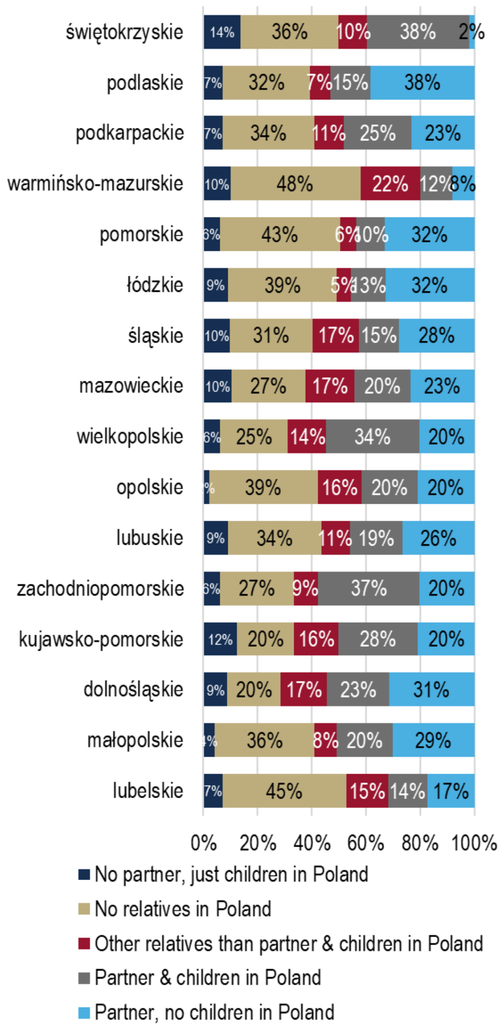
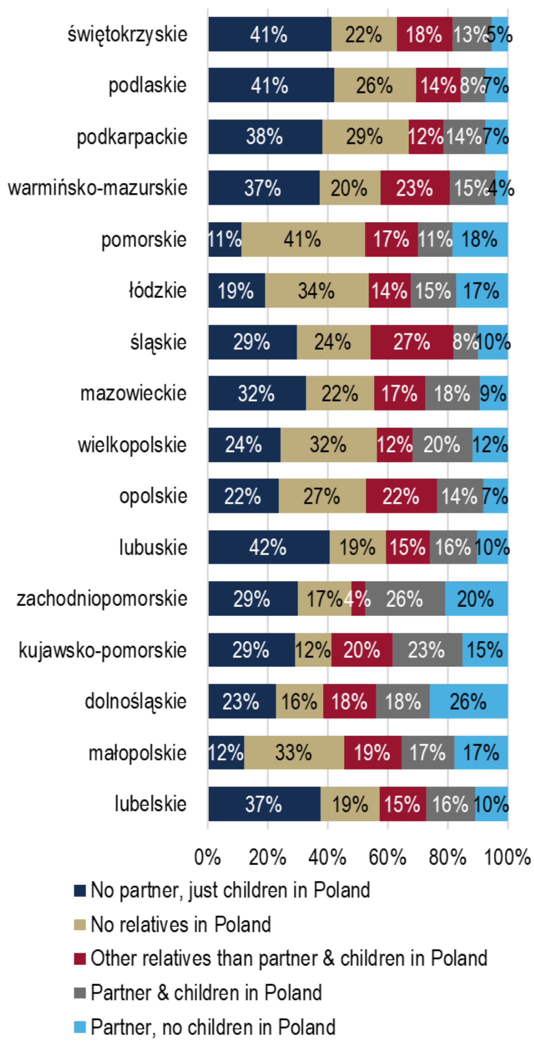


Figure 68. Refugees – family situation in Poland according to voivodeship



In the case of refugees, the biggest percentages of single parents were found in the Świętokrzyskie, Podlaskie, Podkarpackie, Lubelskie and Lubuskie Voivodeships, while the lowest one was in the Pomorskie Voivodeship. The biggest percentage of families with children live in the Zachodniopomorskie i Kujawsko-Pomorskie Voivodeships, while the lowest in the Podlaskie Voivodeship. The highest percentage of people without families was found in the Pomorskie Voivodeship.

The economic activity of pre-war migrants is not really diversified by voivodeship (**Figure 69**). The regional diversification of the refugees is much more apparent (**Figure 70**). As far as pre-war migrants are concerned, a relatively high percentage of them was observed in the Opolskie Voivodeship (19%), whereas the regions differed in terms of migrants with steady jobs and those employed under less stable contracts (other employment, self-employment, etc.). Less stable kinds of jobs were rather frequent in the Lubelskie and Podkarpackie Voivodeships. Teleworking for employers outside Poland was marginal.

Figure 69. Pre-war migrants by economic activity and voivodeship

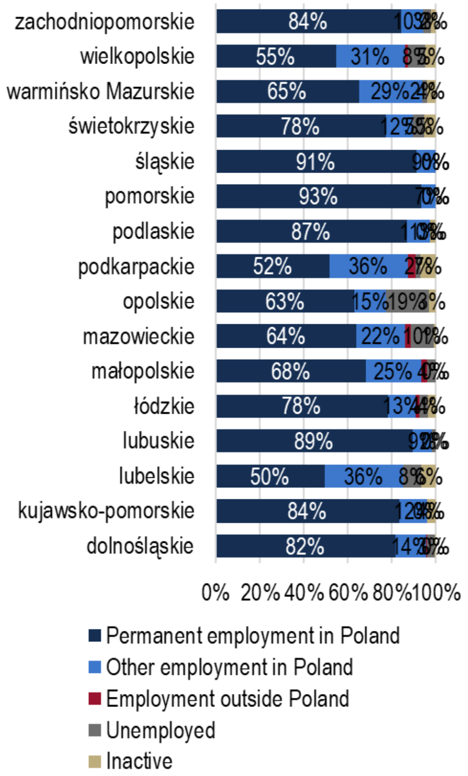
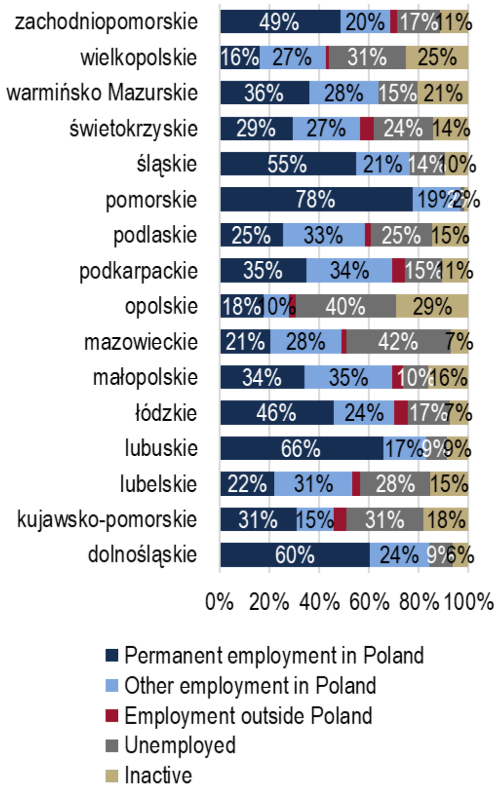


Figure 70. Refugees by economic activity and voivodeship



The diversification of economic activity was much higher in the case of the refugees. The share of immigrants in permanent employment was relatively high in the Dolnośląskie, lubuskie and Kujawsko-Pomorskie Voivodeships. On the other extreme, the Wielkopolskie, Opolskie, Mazowieckie and Lubelskie Voivodeships had the lowest share of those in permanent employment. The voivodeships were also diversified in terms of unemployment. On the one hand, unemployment among the refugees was in single digits and similar to that among the pre-war migrants in the Dolnośląskie, lubuskie and Kujawsko-Pomorskie Voivodeships. On the other hand, the share of the unemployed approximated or exceeded 30% in the Opolskie, Wielkopolskie, Mazowieckie and Lubelskie Voivodeships. The results demonstrate that the challenges connected with the integration of the immigrants in the local labour markets are very diverse across the regions. Generally speaking, integration in the labour market went faster in the voivodeships where there had been a well-organised community of immigrants before the war and in the voivodeships with relatively high demand for labour which could be satisfied by immigrants (e.g. in tourism).

An analysis of the responses concerning the inclination to return to Ukraine quickly if the war ends soon, broken down by voivodeships, shows that the voivodeships differ somewhat. As far as the pre-war migrants are concerned, those living in the Małopolskie Voivodeship and the voivodeships of western Poland are the least inclined to return (**Figure 71**). Declarations concerning returning to Ukraine were most often made by migrants from the Lubelskie, Świętokrzyskie, Podlaskie and Podkarpackie Voivodeships.

Figure 71. Percentage of the pre-war migrants declaring that they would return to Ukraine within 3 months if the war ends soon, by voivodeship

Figure 72. Percentage of the refugees declaring that they would return to Ukraine within 3 months if the war ends soon, by voivodeship

As far as the refugees are concerned, the intention to return to Ukraine quickly was declared first of all by the refugees from the Warmińsko-Mazurskiego, Lubelskie, Podlaskie and Pomorskie Voivodeships (**Figure 72**). Least inclined were the refugees living in the Łódzkie, Lubuskie, Świętokrzyskie and Dolnośląskie Voivodeships. Considering the population of the migrants from Ukraine collectively and relying on the responses concerning a quick return to Ukraine if the war ends soon, it seems that the migrants living in the Dolnośląskie, Lubuskie and Małopolskie Voivodeships are the best settled in Poland. Those living in the Warmińsko-Mazurskie, Lubelskie and Podlaskie Voivodeships are the least inclined to stay in Poland. This is important as it influences the labour markets in the respective regions.

Figure 73. Current housing situation of pre-war migrants by voivodeship

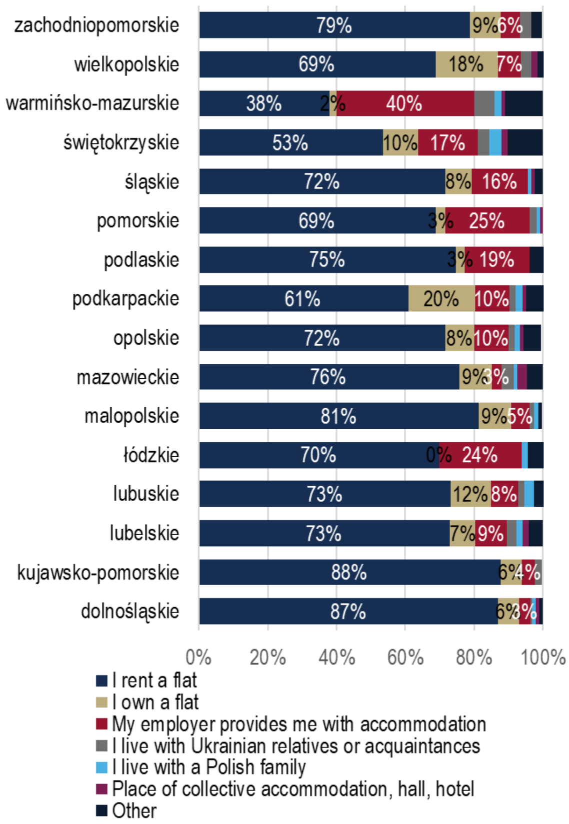
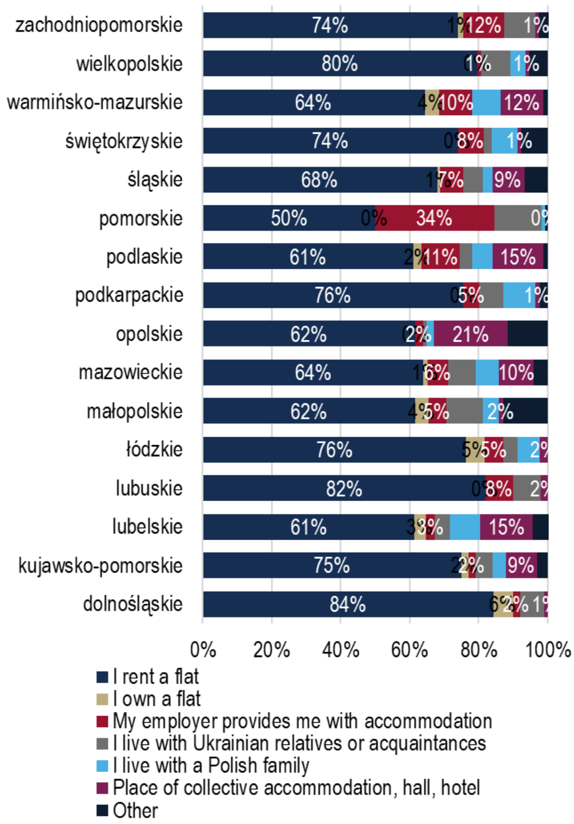


Figure 74. Current housing situation of refugees by voivodeship



Housing is one of the key factors determining the standard of living. The survey showed that rentals is the dominant form of satisfying one's housing needs among the migrants from Ukraine. There are certain differences between voivodeships, primarily concerning the satisfaction of housing needs by the employers. Apart from charitable work, this reflects the different business strategies of enterprises **(Figure 73, Figure 74).** Some enterprises offer a room or a flat in a bid to attract workers. The percentage of migrants whose housing needs are satisfied this way is visibly higher in the Pomorskie, Warmińsko-Mazurskie and Łódzkie Voivodeships than in the other ones. Also noticeable was the decline in the percentage of the migrants living in places of collective accommodation arranged by the Polish state. The percentage of those living in such accommodation is slightly higher in the Opolskie, Lubelskie and Podlaskie Voivodeships than in the other voivodeships. The highest percentage of respondents owning a flat is in the Podkarpackie and Wielkopolskie Voivodeships.

Annex. Description of the survey method

The survey of migrants from Ukraine took place in the period from 8 May 2023 to 7 July 2023. The survey was conducted by the Regional Branches of NBP in all voivodeships. In order to ensure a better representativeness of the survey, the field interviews were conducted in the 16 voivodeship capitals of Poland and in smaller towns (at least 20% of the sample in every voivodeship). The survey was conducted with the use of printed questionnaires in Ukrainian, Polish and Russian.

The survey covered adult migrants from Ukraine (people of over 18 years of age), both pre-war migrants and refugees. As certain minimum numbers of respondents from each category of migrants were needed for the analysis, it was assumed that the percentage of people in each of the groups should be at least 30% of the sample size for each of the NBP Regional Branches. It was assumed that refugees were people registered in the PESEL-UKR register or not registered there but who first came to Poland in 2022 or 2023. Pre-war migrants are all other people.

The survey was conducted in every voivodeship in at least four of eight specified categories of places (e.g. businesses, public offices, places of collective accommodation). The percentage of the respondents in each such place did not exceed 30%. In total 3,658 questionnaires were collected.

The interviewers were tasked with ensuring the diversity of the respondents by avoiding the so-called snowball effect, i.e. avoiding interviewing people who were staying together or knew each other. In order to improve the representativeness of the survey, the results were weighted with the PESEL-UKR proportions by voivodeship.

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