

# Voice of Ukraine

**2022 – 2024**

Building a comprehensive picture of the shifting views, priorities and challenges faced by displaced Ukrainian nationals across Europe

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# Introduction

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It has been two years since war broke out in Ukraine, and during this time we have completed six waves of research with displaced Ukrainians. Our Voice of Ukraine study has provided critical insights into the evolving needs of Ukrainian citizens to help inform effective policy making and the implementation of plans by National Governments throughout the European Union.

Our research has helped policy makers and other organisations better plan and adapt to the changing needs of displaced Ukrainian citizens, and the communities that they are now a part of. At this point in time, it is unclear for how long the war will continue – and with this level of uncertainty, many Ukrainians are starting to form strong roots in their host nations, particularly those with children who are in school and forming friendships and relationships.

The number of people affected is staggering. Since the start of the war around 8 million Ukrainian citizens have fled Ukraine, and just over half, 4.27 million<sup>1</sup> (many of them women, children and the elderly), have temporary protection status in their ‘host’ countries throughout the EU.

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## Wave dates

Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 6
June 22	Oct 22	Jan 23	Apr 23	Sep 23	Nov 23

<sup>1</sup> <https://www.consilium.europa.eu/en/infographics/ukraine-refugees-eu/>

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# Providing critical information and insight to power decisions

Due to the scale and speed of the displacement that was forced upon Ukrainian citizens, our experts facilitated a swift pan-European response; understanding the evolving priorities and challenges displaced persons were facing.

Since our first wave of research in June 2022, Verian (formerly Kantar Public) has gathered 6,500 respondents to respond to questions, giving a voice to people who loom large in the news but whose individual experiences are often not clearly heard or understood. Through qualitative as well as quantitative phases, respondents were able to share photos, videos, and written experiences. Bringing the reality of the situations they were facing into sharp and often poignant relief.

Longitudinal robust data and evidence is crucial for governments and policy makers to make informed decisions and to plan ahead effectively, particularly as they moved away from emergency reception towards the medium and longer term integration of millions of Ukrainians into Europe.

It is worth noting that our Voice of Ukraine panel has predominantly female participation, and comprises 88% women, aged between 25–54. Ukraine introduced martial law at the start of the war, prohibiting men aged 18–60 from leaving the country.

## What themes have we covered over the six waves of research?

- > The thoughts of displaced Ukrainians regarding their future plans,
- > Their pathway to integration and how this has evolved,
- > Respondents' views of Ukrainian, European and international institutions.

We intend to continue our Voice of Ukraine study to monitor the ongoing evolution of needs, situations, and migration trajectories of displaced people across the EU, with our teams currently working on waves seven and eight of our research and analysis. Our online panel, provides us with a robust mechanism for conducting agile data gathering across all countries in the EU, and we are grateful to all participants who have made this possible.

# As the war reached its two-year anniversary, we see declining optimism

Since our last report focusing on Wave three in July 2023, there has been a significant change in perspective from our respondents. When asked whether they thought Ukraine will win the war during our sixth wave, there was a significant drop of 36 percentage-points.

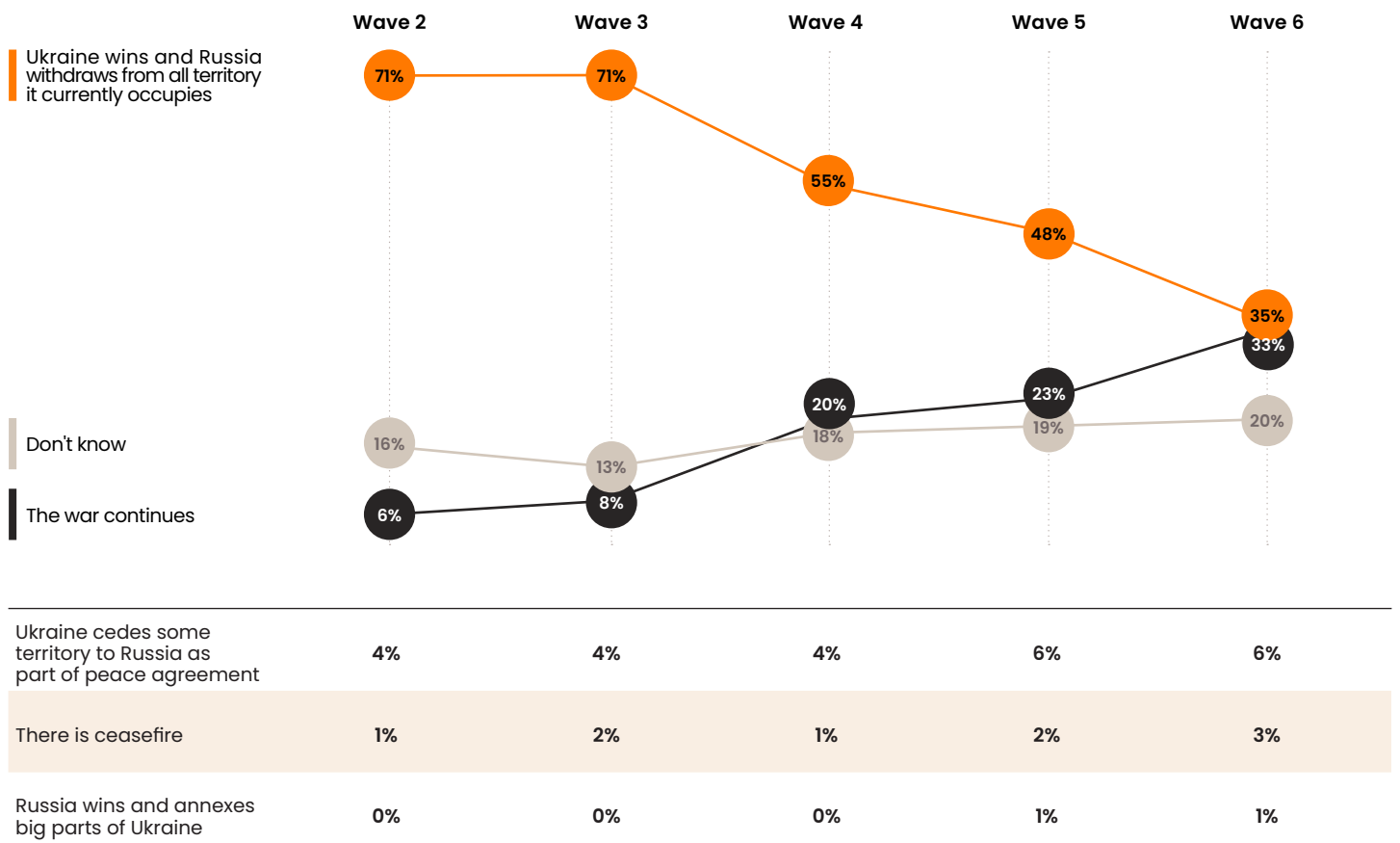
The data from Wave six revealed that only 35% of panellists expect Ukraine to win and for Russia to withdraw from all territory it currently occupies. This figure stands in stark contrast to the more optimistic outlook displayed in Wave three, where

71% believed that Ukraine would win. This sobering decline has come about as Ukraine prepares for its second year of war.

This regression in optimism is also reflected by the decrease in confidence of the war ending. When respondents were asked the most likely outcome of the war by the end of 2024, 33% answered that the war would continue, compared to a comparatively low 6% in Wave two. This indicates the level of resignation felt by displaced Ukrainian citizens that the likelihood of the war ending anytime soon is increasing.

## The war is going to last, victory is far away

What do you find the most likely outcome of the war?



# Migration routes and likelihood of returning to Ukraine

In our initial wave in June 2022, the choice of host country was based on three reasons:

1. Having friends or family in the host country
2. Proximity to Ukraine's border
3. Work opportunities and access to the labour market

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## The decision to settle outside of Ukraine does not come easily to our respondents

**Most respondents chose a certain country for short-term practical reasons rather than long-term consideration. 24% chose their host country because of its proximity with Ukraine and 38% because they had family and/or friends residing there.**

As well as understanding the preferences expressed for certain 'host' countries, since the start of our study, our Verian team from across Europe, has also made sure to focus on the intention of displaced Ukrainians to return to Ukraine.

Across each subsequent wave we have seen a slow trend emerging, with increasingly fewer respondents intending 'to go back at some point later when [they] feel it is safe to return'; For example, in Wave one, 59% of respondents stated they would 'return to Ukraine once the situation was safe' compared to 43% in Wave six. This mirrors the increase in respondents who chose 'I do not intend to go back and plan to settle outside Ukraine' which has increased from 8% in Wave one to 22% in Wave six.

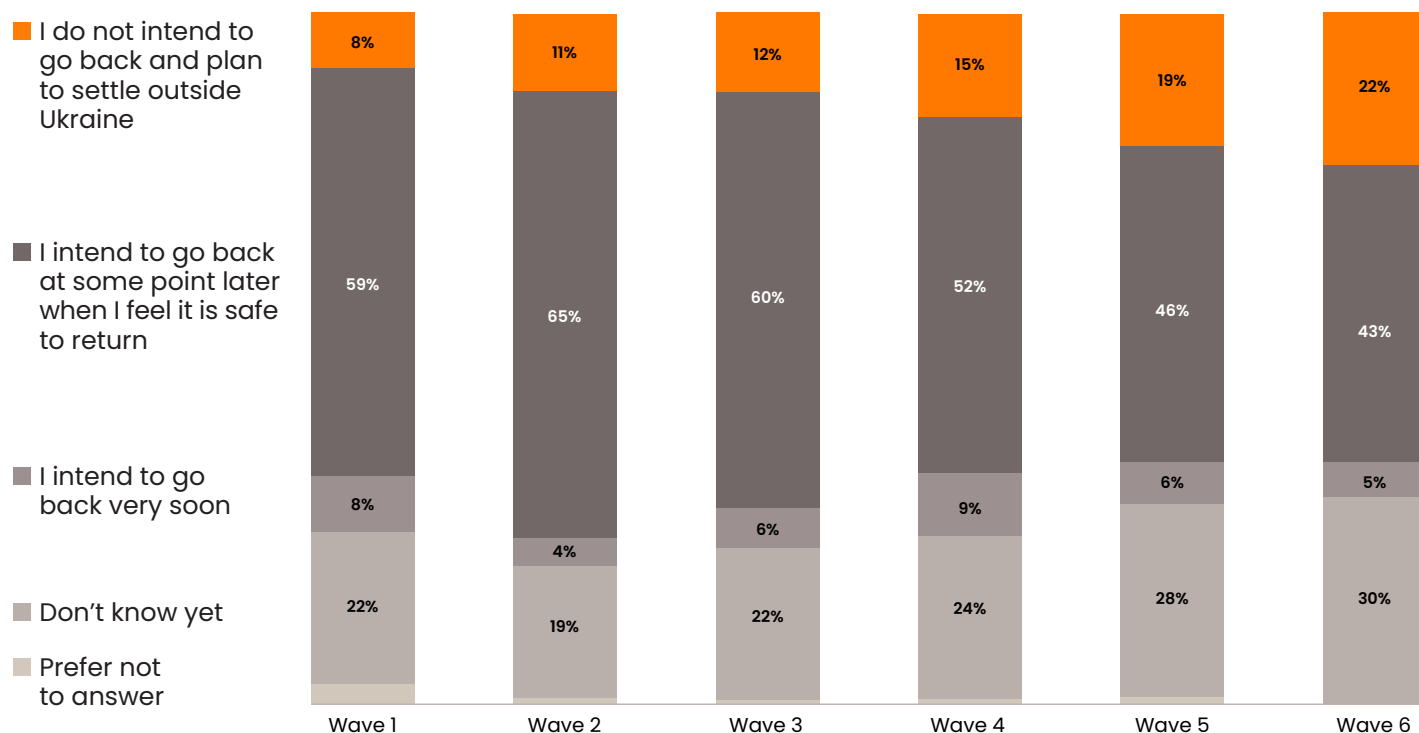
As the study continues, we are potentially seeing diasporas of displaced Ukrainians across Europe, as individuals and families settle and continue to integrate into their host countries. Although visits to Ukraine are becoming more frequent across respondents, over half (53%) of them return only for short periods.

It should be noted that the decision to settle outside of Ukraine does not come easily to our respondents. During the qualitative phase, we saw the complex and difficult situations displaced Ukrainian women faced regarding their intentions to return to Ukraine. In addition to their guilt about leaving their families and friends back home, the negative aspects of the situation in their home country are also prevalent, as well as the progressive integration of themselves and their children into the schools and communities of their host countries.

With more displaced Ukrainians planning to settle outside Ukraine, institutions across the EU must prepare for longer-term solutions to support the increasing numbers of Ukrainian nationals who want to integrate in their host countries or migrate from other destinations. Building this scenario into future plans and public policy agendas is now essential.

### A diaspora in the making

What are your plans regarding returning to Ukraine?



# Increasing numbers of displaced Ukrainians now in employment and/or education

**Our study has seen a rapid increase in more displaced Ukrainians taking up employment and in education (languages and training classes).**

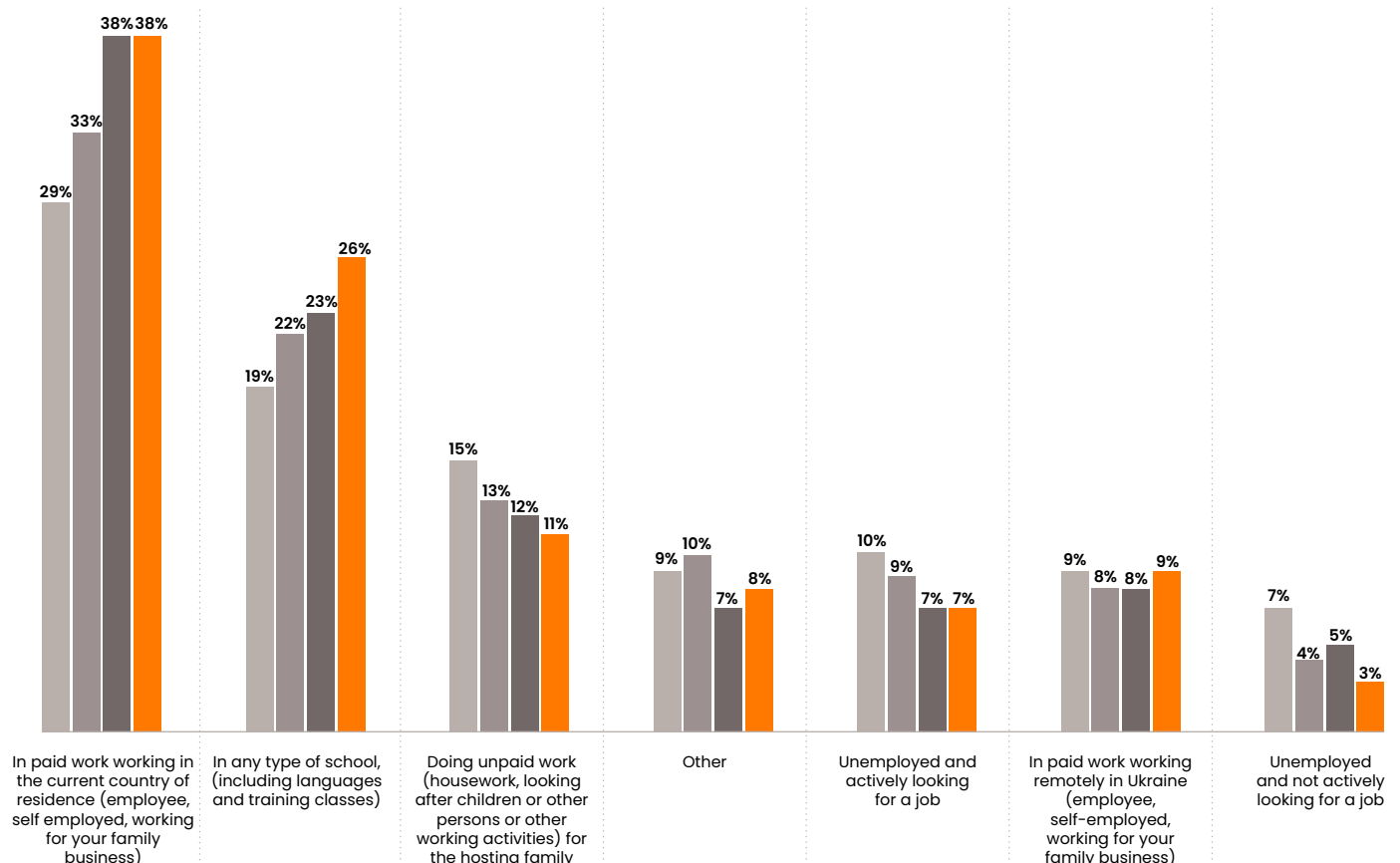
The growth of employment between research waves three to six, which all took place during 2023, show that overall the employment status of respondents went from 29% to 38% over the 12 month period. This trend is also reflected when we look at the proportion of respondents who have enrolled in education, including languages and training classes, from 19% to 26%.

Although displaced Ukrainians were supported through emergency aid upon their initial arrival, they swiftly looked for jobs. There are numerous reasons for this, some which were stated during our qualitative phase. Securing work meant that they would be able to provide for themselves and family; many are driven by the desire to send financial support back to those in Ukraine, and finally, the growth of employment serves as a means of integration in their host countries, growing connections and opportunities for long term resettlement.

## More and more Ukrainians have a paid job

Which of these descriptions best apply to what you have been doing for the last four weeks?

■ Wave 3 ■ Wave 4 ■ Wave 5 ■ Wave 6



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# Germany and Poland: two host countries, two different reasons

**Germany and Poland have been the two main host countries for displaced Ukrainians<sup>2</sup>, and approximately half of respondents from the study are now residing in either Poland or Germany.**

However, the intentions of those moving to these respective countries are different. The data gives us the opportunity to delve deeper into the attitudes and experiences of respondents who migrated to these two countries.

There is a stark difference between panellists who migrated to Poland, and those to Germany. When asked whether they were planning to return to Ukraine, 46% of those in Poland intended to do so, whereas only 36% of those based in Germany shared the same view. This 10-point difference may underscore the

varied perspectives of these countries from our respondents. Although displaced Ukrainians living in Poland primarily receive their income through low-skilled jobs, in Germany, financial aid still plays a more substantial role, with job opportunities scarcer.

This correlates with the results we received when respondents indicated their varying levels of appreciation for financial aid: overall 64% valued the support they received from financial aid. However, there were significant differences between the responses from displaced Ukrainians in Poland compared to those in Germany. While 54% of those in Poland appreciated the aid, a higher proportion of those in Germany acknowledged the importance of financial aid (84%).

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## Access to skilled employment is often hampered by poor knowledge of the host country's language

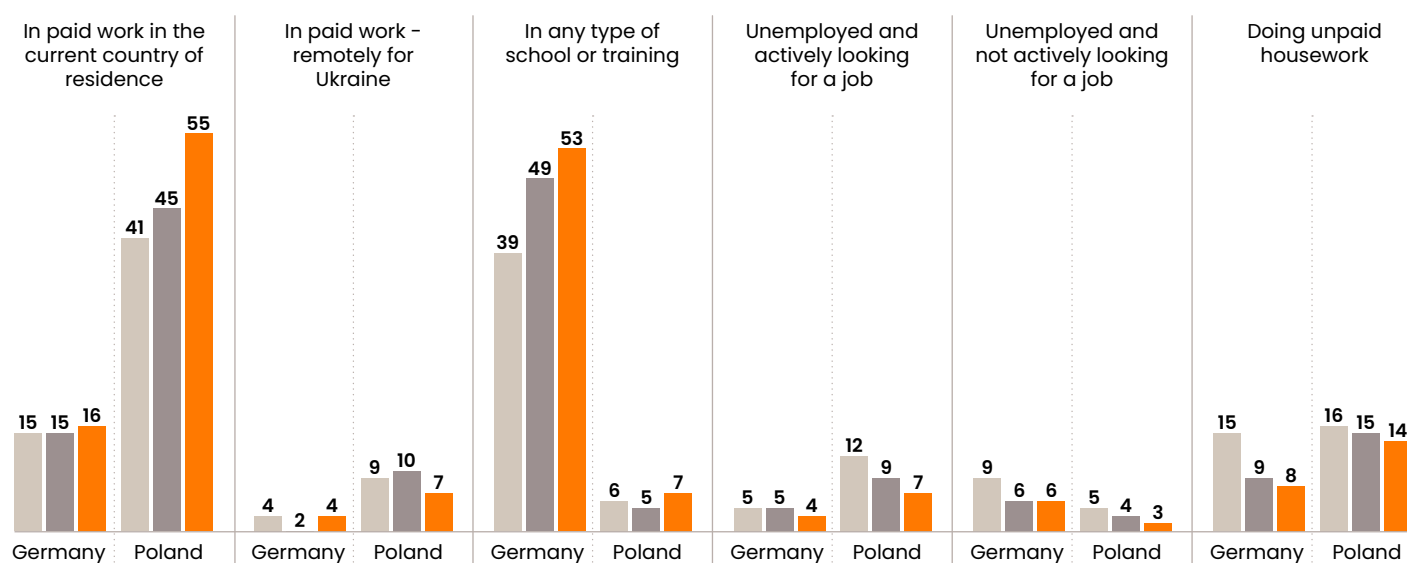
<sup>2</sup> UNHCR dataportal and EUROSTAT, January 2024



## In Poland, they work. In Germany, they study.

Which of these descriptions best apply to what you have been doing for the last four weeks?

■ Wave 3 ■ Wave 4 ■ Wave 5



With these insights, we can start to understand the relationship between migration routes, economic factors, and the preferences of displaced Ukrainians. Germany is considered to be a good place to settle, but with greater numbers still needing to depend on financial aid, policymakers must make efforts to expand the reach of training and language learning courses. This is because access to skilled employment is often hampered by poor knowledge of the host country's language; making it harder for Ukrainians to integrate into the host country.

By documenting the migration routes and identifying new or evolving situations, we aim to understand the thinking and future plans expressed by displaced Ukrainian nationals. This in turn allows policymakers and institutions to design and implement appropriate and effective future policies and support structures.

# Declining levels of trust in Ukrainian institutions and international organisations

Another theme that our team concentrated on through each of the respective research waves, was the level of trust displaced Ukrainians had in their country's institutions, as well as other international organisations, since the start of the war.

It should be noted that even pre-war, the Ukrainian population had a relatively negative view towards their institutions, which had a reputation for defiance and corruption. This opinion continued to decline during the war, with only the army reaching high levels of trust- 90% in wave six (a reduction of 3% since wave three). However, it is not surprising that the Ukrainian Army experience such high levels of trust from our respondents, considering the vast majority will have close relatives and friends, among frontline military personnel.

In the sixth wave of the study, we see a significant decline in trust levels for all other Ukrainian institutions including the Government, the Police and the Judicial

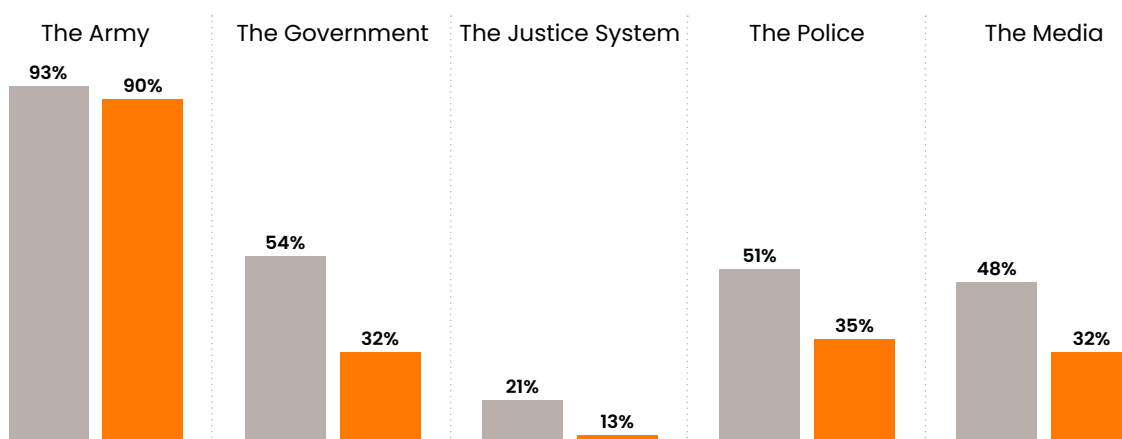
System. Between waves three and six, levels of trust in the Government drop from 54% to 32%, in the Police from 51% to 35% and trust in the Judicial System drops from 21% to 13%.

This downward trend is also reflected in the trust levels respondents have towards international organisations – although not to the same extent. While trust levels overall are still high for international organisations, the data reveals a slight decline from wave three to six. This dip in trust is in line with a decline in morale as the war continues, as well as public opinion and political support weakening. The slight erosion of trust in key international institutions may reflect the deepening challenges faced by displaced Ukrainians, as there is no clear end in sight for the war back home. It is vital that international institutions make efforts to rebuild this trust by continuing to support displaced Ukrainian nationals to integrate into their local communities within their host countries.

## To what extent do you trust each of the following Ukrainian institutions?

% of "somewhat trust" and "totally trust"

■ Wave 3 ■ Wave 6



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# Conclusion

The war in Ukraine has reached the two-year mark and displaced Ukrainians are becoming more convinced that they will remain and potentially settle in their host countries permanently.

Whilst host countries and international institutions have necessarily moved away from their initial emergency response, there is still an urgency for policy makers and international institutions to re-examine their approach and to provide sustained, longer-term support to facilitate the integration of displaced individuals within their host countries.

Recognising the significance of training and skills development and focussing on further education initiatives can encourage displaced Ukrainians to learn the language of their host country to advance their career opportunities, and make a meaningful contribution to the communities they are now a part of.

As public interest in the war in Ukraine wains, alongside the shift in sentiment from our respondents, it is imperative that this study continues to give a voice to displaced Ukrainians and shed light on the evolving needs and challenges they are facing. The data and insights from our Voice of Ukraine study are available to all organisations working to design, implement and evaluate policies and programmes intended to support displaced Ukrainians throughout Europe.

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**We are honoured to share, that through the generosity of our Voice of Ukraine panellists more than €20,000 has been raised and donated to charities supporting those impacted by the war in Ukraine - including Caritas Ukraine, Ukrainian Red Cross Society and UNITED24.**

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Participants in our ongoing Voice of Ukraine study have the choice to select from a range of incentives in recognition of their participation.

In the last two waves, the majority of respondents chose to donate their incentive to charities directly supporting those who have been impacted by the war in Ukraine.

Thank you to all our panellists for their ongoing involvement and for supporting those most in need.

## Voice of Ukraine in Europe

### A panel by Verian

We manage to establish a sample of displaced people from Ukraine through recruitment via Facebook ads and groups. The recruitment process first started by the set-up of advertising campaigns on Meta's ad manager. We defined our target group using information Meta collects about users on demographics and interests and finally posted the ads on Facebook and Instagram. Once users click on the ad, they are redirected to our survey script hosted by Kantar – so outside Meta's universe. Invites to the survey were also published on various Facebook and Instagram groups concerning Ukrainians (historical Ukrainian diaspora groups in EU countries, recently created groups to help

temporarily displaced Ukrainians). This allowed to constitute rapidly a panel of several thousands of displaced Ukrainians. Panelists are spread over all the 27 EU countries, and their distribution by countries is well aligned with the estimations provided by the UNHCR.

This panel is intended to be used as an access panel that we will continue to enrich and interview. It will be accessible and available to public institutions and NGOs.

For more information, you can directly contact Marco Pelucchi at [marco.pelucchi@veriangroup.com](mailto:marco.pelucchi@veriangroup.com)

## The team

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## About Verian

### Formerly Kantar Public

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Verian is a world leading, independent research, evidence, evaluation, and communications agency, providing services to government and the public realm.

We work with our clients to help solve the next generation of public policy challenges. With offices across Europe, APAC and in the US, our consultants and researchers are supported by our unique global data ecosystem. We provide gold standard data on the economy and society to decision makers and engage directly with many millions of citizens each year on their behalf.

Combining expertise in human understanding with advanced technologies and data science, our work with clients creates policy interventions, designs better public services, and unlocks behaviour change.

We support the rapid development of policy thinking in moments of urgency. We implement policies on the ground. We build communications to reach diverse and complex audiences.

We bring global best practice and local expertise.

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**Editorial note:** There has been an update to the graph on page 7 in this version of the report (April 2024).