

Understanding and addressing Ukrainian refugees needs

MAIN INSIGHTS FROM OUR UKRAINIAN DISPLACED PEOPLE PANEL

More than 7 million Ukrainians have left their country to escape the war. Most plan to go back, but when? In the meantime, they must access housing, healthcare, education, and financial resources. Kantar Public has set up a dedicated panel to explore their needs.

As a consequence of the Russian invasion of Ukraine the 24th of February, more than 7 million Ukrainians left their country to escape the war. In response to this, the Member States of the European Union joined forces to welcome the influx of displaced people. For the first time ever, the European directive 2001/55 was used to provide displaced Ukrainians access to numerous rights enabling them to start a new life on European Union soil. So far, most reactions by public authorities have been focused on providing emergency support and temporary solutions. Six months later, with no end to the conflict in sight, more structural solutions need to be found to enable Ukrainians displaced by the war to continue their lives as best as possible.

In-depth insight into the changing needs of displaced Ukrainians has so far been very limited as they continue to move and experience changing personal situations. To address this, Kantar Public has started building a light and dynamic

bespoke online panel to monitor what happens to displaced Ukrainians in the EU over a relatively long period of time and to identify the best solutions to their needs.

In this note we highlight the main findings of this first survey among displaced Ukrainians in the EU and share the following main insights that can help policy makers formulate the best response to this situation:

- The reason why Ukrainians chose to settle, or not, in the country they have reached and their plan regarding a possible return to Ukraine.
- A description of the main characteristics of the population, mainly regarding their profiles and living conditions.
- An analysis of the main challenges they are facing and how they personally assess their situation.

We'd be happy to talk further about the research discussed in this paper. Please contact:



Yves Fradier
Director Evidence
Kantar Public, France
yves.fradier@kantar.com



Agata Zadrożna
Senior Consultant
Kantar Public, Poland
agata.zadrozna@kantar.com



Anne-Sarah Chekaf
Research Assistant
Centre Kantar Public
sur l'Europe
anne-sarah.chekaf@kantar.com

¹ <https://data.unhcr.org/en/situations/ukraine>

² <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A32001L0055>

Initial, current, and future plans

Ukrainians forced to flee their war-torn country first found immediate practical solutions. Six months later, the majority think they have reached their preferred destination. Only a minority imagines staying in the European Union permanently with the vast majority of displaced persons looking to return to Ukraine as soon as the situation allows it.

When displaced Ukrainians arrived in the EU, the first responses and measures were taken in an emergency to meet their immediate needs. People offered to put them up in their homes and some offered to put them up for free in flats or houses they would usually rent. These solutions, necessary as they were, are not sustainable. In the current context with the war still ongoing, it is important to understand Ukrainians' plans and ideas about their future situation in order to provide the necessary help and guidance.

Since the escalation of the conflict between Russia and Ukraine, Poland, because of its geographical proximity and the shared border it has with Ukraine, was the main country through which Ukrainians came to the EU. According to the United Nations, more than 3.5 million of the people that fled Ukraine arrived in Poland³. In our survey, 64% of the respondents went through Poland and 35% of them reported staying currently in Poland. When asked if they plan to stay or go to another country, 65% of them plan to stay in Poland, 29% don't know yet what they plan to do in the future and only 1% plan to go to another country.

According to the United Nations High Commissioner for Refugees (UNCHR), Poland is the main host country (31%). Other countries in the European Union have also seen displaced Ukrainians coming and settling such as Germany (22%), Czechia (10%), Italy (3%), Spain (3%), France (2%) and Slovakia (2%)⁴.

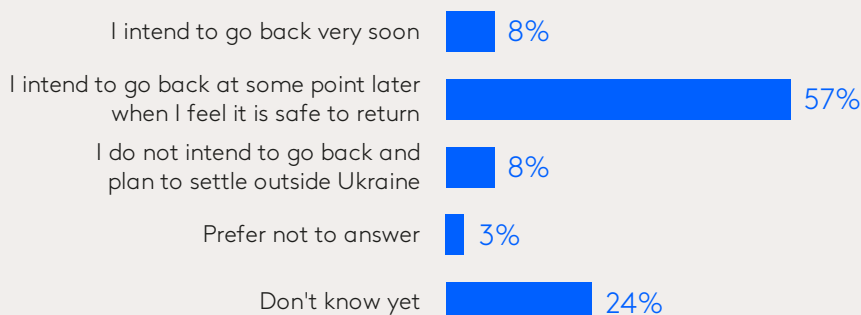
In all cases, the majority of the displaced people interviewed plan to stay in the country where they currently are: 65% in Poland, 78% in Belgium, 72% in Czechia, 71% in France, 70% in Germany and 60% in Spain. **However, it is important to note that the share of undecided people is significantly high** (from 18% for Belgium to 29% for Poland). These numbers embody the situation of many Ukrainians: **they seem satisfied to be where they are (safe and not in a country at war) but are still quite confused concerning their future.** However, the development of the conflict in Ukraine is unknown and what was previously seen as a short term and very practical answer may become a permanent solution. The category of respondents aged 35-44 illustrates well these mixed feelings. While 29% of them

plan to stay where they currently are, 31% say that they don't know if they have reached their preferred destination yet. For those who want to go to another country Canada is the preferred destination followed by Germany, Poland, Belgium, and the United Kingdom. However, the share of undecided people on their preferred destination is, here again, quite high (12%).

It is crucial for public authorities, however, to note that staying permanently outside of Ukraine is not an option for most of our respondents. A majority has in mind to go back to Ukraine at some point when it feels safe to return (57%)⁵ and only 8% of them reported not having the intention to go back but rather planning to settle for good in the host country where they are today. The same share of people intends to go back to Ukraine very soon (8%). Here again, uncertainty is high with around a quarter of the respondents (24%) who have not decided on their plans regarding returning to Ukraine or not.

GRAPH 1

Future location envisaged by our respondents



³ <https://news.un.org/en/story/2022/05/1119172>

⁴ <https://data.unhcr.org/en/situations/ukraine>

⁵ It is also known that some of them have already returned to Ukraine despite the risks involved

Country choice

Concerning the main reasons why displaced Ukrainians choose a certain country, short-term practical reasons are more common than long-term considerations.

In fact, for 24% the reason to choose one country instead of another is because of its geographical proximity with Ukraine. 19% of the respondents answered that they had job opportunities, and 16% decided to go where they are because of schooling options for their child or children. The culture of a country close to theirs comes next (16%), above benefits and material support provided by the authorities (10%), the fact that they can speak the language of the country (8%) and finally an easy access to housing (8%). This draws a very practical picture; decisions were made in the context of the rush out of Ukraine.

As the war goes on, however, the reasons to choose a country might change and issues like housing, the cost of living, job opportunities and social activities (being closer to family or friends) might become more important. This shift from a short term to a more long term perspective would be something interesting to monitor, in order to make sure that decisions and public policies will be in line with displaced peoples' expectations and situations. These questions should be explored further during our second wave of study.

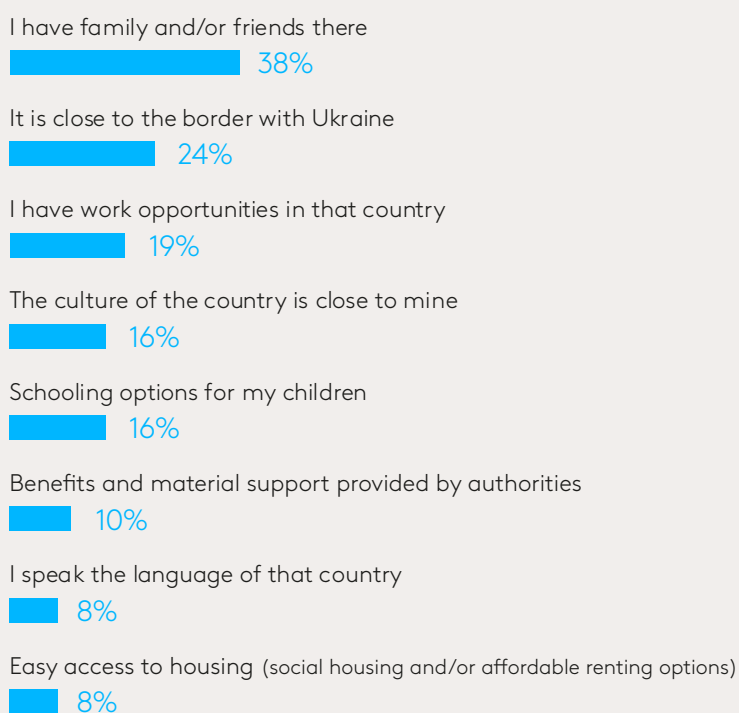
The vast majority of them came with children (73%), and this seems to be one of the main concerns which will have an impact on all the choices made.

In order to understand the needs of displaced Ukrainians, it is important to know who they are. Our data, which is in line with other surveys and official statistics⁶, shows that the majority of them are women (82%), middle-aged (52% are 25-54 years old) and left Ukraine with one or two children under 18 (73%). The respondents left their country mostly at the beginning of the conflict (83% in February or March 2022) and come from the areas most

affected by hostilities. The main reasons for leaving Ukraine are fear for the lives and health of children (59%) and fear for their own life and health (24%). Considering that protecting children and keeping them away from war were the main reasons for displaced people to leave Ukraine, **it can be expected that the possibility of providing children with adequate education, housing and maintenance, healthcare, and above all security, will largely shape future decisions regarding the choice of the country of residence, or a possible return to Ukraine.**

GRAPH 2

The main reasons to choose a country to settle in



⁶ <https://data.unhcr.org/en/situations/ukraine>



It is also important for policy makers in Europe to know whether Ukrainians who left their country are integrating into local communities and taking up jobs or on the other hand are continuing rather to treat the situation as only temporary. In the light of the survey results, Ukrainians seem to be little integrated with local communities across Europe. One of the reasons may be that almost all (90%) of the respondents left close family members in Ukraine, while 42% of married people left their spouses. In addition to this, integration difficulties may be caused by the fact that displaced persons very rarely speak the language of the host country.

Some other important factors forcing Ukrainians to return to their homeland are the costs of living in other European countries which are much higher than in Ukraine. Our data shows that people who left Ukraine were usually more well-off than average with a higher level of education (59%), from large cities (64%) and employed (62%). Currently 39% of them can pay everyday expenses from their savings but the majority receives support from authorities of the country they are residing in (42%), family and friends (24%) or NGOs (10%). Moreover, one third (33%) of respondents work in the country they are residing in and 13% continue to work remotely for their Ukrainian employer i.e, 20% of those

who were previously working. Half of men and less than one in three women have a job and it seems clear that women are limited in their ability to take a job by the need to take care of the children.

Another factor hindering integration is that only 31% speak English, and even fewer speak other local languages (most often Polish - 14%). This certainly does not make it easy to start a job or establish relationships with local residents.

However, if a large proportion decide to stay outside of Ukraine even for a while, providing them with adequate housing becomes a significant challenge. Currently, most stay in temporary housing, being hosted by local families (20%), hosted by friends or family members (20%), in accommodation provided by local authorities (13%), or in a reception center, refugee camp or pop-up container village (5%).

In the next wave of the project, we will focus our research on the degree of integration and how their attitude towards it changes over time. In addition to this, understanding the reasons why displaced Ukrainians want to return to Ukraine even though the war is not over is of great interest.

Ukrainian refugees and European Union

The arrival of displaced Ukrainians in the European Union has been welcomed and regulated. Now a few months on, it is important to look back on the policies implemented by the EU Member States in order to assess whether they are well adapted to the needs of Ukrainians.

The temporary protection offered by the EU through the directive 55 grants access for displaced people forced to leave their country because of the war to suitable accommodation, the social security system and medical care, the labour market and the education system under the same conditions as nationals of the host Member States. The existence of this directive already covers many basic needs but in order to improve the processes, as it is the first time this is concretely put in action in the EU, it is important to know precisely what the most pressing needs of displaced persons are. In this survey, altogether, **70% of displaced Ukrainians are satisfied with their**

overall living conditions. 73% of the respondents report having applied for the temporary protection, 9% stated they did not and did not intend to, 6% have a residence permit and 4% are under international protection and asylum⁷.

A population that faces financial difficulties

It is important to focus on the **financial situation of displaced Ukrainians as overall**, 53% of respondents define their financial situation as challenging. This is related to their job situation as only 33% started working in their host country and 20% continue to work remotely at their previous job after leaving Ukraine. On top of that, 52% consider finding a job a challenge. In this context, **as wages in Ukraine are comparatively much lower than the EU average⁸, those living with Ukrainian wages on European soil are doomed to struggle financially. This would explain the challenges for displaced Ukrainians facing a higher cost of living in their host country.** Moreover, many seem to face difficulties to access financial aid support. Less than half (47%) are satisfied with it and 25% declare not being satisfied. This is an interesting point and deserves the attention of policy makers. **How could access to financial support be made easier?** Is it a lack of information about possible aid? Again, from the perspective that the war will continue, this unstable financial situation does not allow for easy and sustainable integration into society.

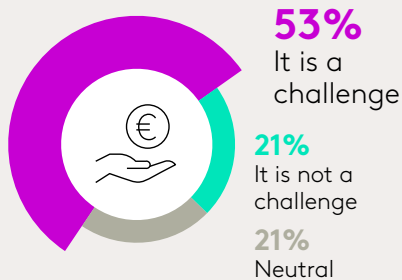
The temporary protection allows displaced persons access to medical care and social protection and 44% of them seem to be satisfied with their access to the medical care and health system.

Nevertheless, **41% of the respondents stated that facing health issues was a challenge.** Medical care being a very important issue, it seems necessary to understand the underlying explanations. Could it also be a lack of information provided to the displaced persons stating that they have the right to access medical care? Or is the procedure too complex for the medical system of each Member State? In that sense, **it would be interesting to collect more data on the question in order to assess and re-adjust the situation.**

Language is a barrier to good integration

The language barrier is a challenge for a majority of respondents (54%), preventing them from integrating in their host country. However, it is interesting to note that access to language courses or other training courses is satisfying for 46%. On top of that, 6 out of 10 respondents fled Ukraine with people aged under 18 which implies the need for children to have access to education and school and to learn the language of the country they are in. Access to education for children is described as not being a challenge for 34% of them and 49% are satisfied with the education situation in the country they are currently residing in.

GRAPH 3
The financial situation seen as a challenge



⁷ The remaining part plan to apply to a status but in a different country or prefer not to answer.

⁸ <https://tradingeconomics.com/ukraine/minimum-wages> 6500 UAH corresponds approximately to 172 euros

The key takeaways

Most displaced Ukrainians have reached their preferred destination in the European Union and see their situation with a positive and optimistic mindset, the majority of their needs being satisfied. They consider their situation as only temporary, however, and intend to go back to Ukraine once it is safer for themselves and their children. Nonetheless, even if the majority do not currently plan to settle, it will be useful to have concrete data on their integration processes in order to provide them with the best possible quality of life. Keeping in mind that most of our respondents have children with them, it is crucial for them to grow up in a friendly environment even if it is only for a moment.

With the war ongoing, Member States and decision makers should be able to provide a correct and stable situation just as the temporary protection stipulates. However, the level of integration of Ukrainians into European communities is low. In their current location, most of them do not work, rely on the support of local authorities and live in temporary accommodation. What is more, a majority of them consider their financial situation as challenging, and more than four in ten think the same about health issues (for them or their family members). Additionally, most do not speak any other language than Ukrainian and Russian, which prevents them from integrating properly. It will be very interesting to observe in the next waves of the research to what extent displaced Ukrainians start to integrate with local communities. How many of them will start learning the language, take up a job or seek recognition of their Ukrainian qualifications? Will the situation allow them to come back home or force them to make their new home abroad?

Voice of Ukrainians in Europe

A panel by Kantar Public

We managed 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 campaign 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 was 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. Panellists 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@kantarc.com