

# KANTAR PUBLIC



## **Understanding and addressing the needs of Ukrainian displaced persons**

Insights from Kantar Public's Voice of Ukraine study into the intentions and daily challenges facing Ukrainian nationals, displaced from their country since the start of the Russian invasion.

CENTRE  
**KANTAR PUBLIC**  
SUR L'EUROPE

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# Introduction

Over eight million people have been forced to flee Ukraine since the beginning of the war and the number continues to rise.

To better understand the migration pattern, alongside the needs and expectations of Ukrainian displaced persons, Kantar Public launched Voice of Ukraine- an original online longitudinal study, covering all countries in the European Union, and deploying both quantitative and qualitative methods. The data and evidence collected through our Voice of Ukraine programme is designed to assist policymakers and organisations when identifying the best solutions to meet the needs of displaced Ukrainian communities.

Kantar Public recruited more than 12,000 respondents during the first wave of research in June 2022. From this initial group, over 6,500 agreed to be contacted again to participate in waves of research. Between the second and third waves of the study in October 2022 and January 2023 an additional qualitative approach was introduced.

This provided the opportunity for respondents to share photos, videos and experiences in their own words; further expanding the richness of the themes addressed within the quantitative data. A fourth wave is currently being prepared for later in 2023.

It is worth noting that the panel has a predominantly female participation, accounting for 88% of respondents. Among them, 79% fall in the age group of 25 and 54. Following the mobilisation declared in Ukraine, men between 18-60 years of age, who were deemed fit for combat, were prohibited from leaving the country. As a result, most of the individuals who left Ukraine after the outbreak of war were women and children.

Combining the data from all three waves, we will explore the following areas:

- i. The thoughts of displaced Ukrainians regarding their future plans.
- ii. Their pathway to integration and how this has evolved.
- iii. Respondents' views of Ukrainian institutions, the EU, and influential countries.

<sup>1</sup> <https://cepr.org/voxeu/columns/war-conflict-and-forced-migration>

# 01

## As the war persists, displaced Ukrainian nationals have become more uncertain about the possibility of returning to Ukraine

Respondents remain confident that the outcome of the war will favour Ukraine, but the end seems distant

Respondents remain optimistic that the conflict will end in favour of Ukraine with no discernible difference in responses to this question between waves two and three. The data from our latest wave revealed that 71% of panellists expect Russia to withdraw from all occupied territory as the most probable outcome of the war, with only a small percentage (4%) considering that peace will result in the transfer of some territories to Russia.

However, this certainty is not similarly displayed when respondents were asked when they believed the war would end, with many viewing the end of the conflict as a distant prospect.

In the latest wave, over half (56%) expected the war to continue beyond six months, as opposed to just under half of respondents (48%) in October 2022.

There was also a noticeable difference in responses between men and women when asked this question. In January 2023, 27% of women believed the war to end within the next six months, a decline from 31% in October 2022. Meanwhile, over half now anticipate the war to last longer than the specified time (51%).

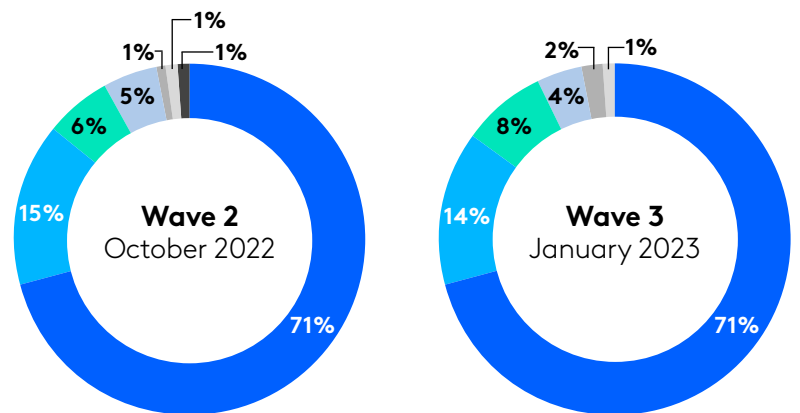
In comparison, only 15% of male respondents expected the conflict to end in the next six months in October 2022. It is evident that more women than men had a positive outlook on the resolution of conflict, but the optimism for both women and men has decreased over time as the war continues.

### What is the most likely outcome of the war by the end of 2024?

- Ukraine wins and Russia withdraws from all territory it currently occupies
- Don't know
- The war continues
- Ukraine cedes some territory to Russia as part of a peace agreement
- There is a ceasefire
- Prefer not to answer
- Russia wins and annexes big parts of Ukraine

Source: Voice of Ukraine Panel, Wave 2 and 3

Base Wave 2: 568; Base Wave 3: 1,619, all respondents



## Returning to Ukraine becomes less of a possibility

By the end of 2022, it was evident that a number of participants were making arrangements to stay in their respective host countries for an extended period of time. Given the war had nearly reached the one-year mark with no end in sight, the proportion of those who were adamant that they would return to Ukraine after the war was over decreased from 50% in October 2022 to 45% in January 2023.

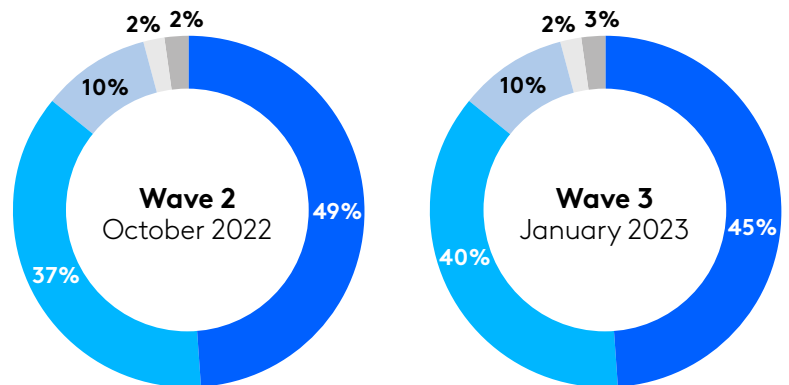
In our most recent wave, we saw an increasing belief that returning to Ukraine within the year was an unlikely possibility, with only 34% of respondents actively making preparations to return; an indication that respondents anticipate the conflict to persist, and that making preparations to stay in their host country for an extended period of time is now a reality.

Occasional visits back to Ukraine have occurred, with 1 in 4 making the return trip between the European Union and Ukraine. Notably, these trips are more frequent among women (27%) than men (13%), and among people aged 35-44 (34%).

## Making preparations to stay in their host country for an extended period of time is now a reality.

### Thinking about your future, where do you want to live after the war is over?

- Once the war is over, I definitely want to live in Ukraine
- I am unsure if I want to remain in the current country of residence or if I want to return to Ukraine
- I definitely want to live in the current country of residence
- I definitely want to move to a different country
- Prefer not to answer



Source: Voice of Ukraine Panel, Wave 2 and 3

\*Base Wave 2: 979; Base Wave 3: 1,565, all respondents outside of Ukraine

However, given the ongoing military action and with no clear roadmap or timeline to a resolution, it should be fully expected that the hopes, intentions and plans of displaced Ukrainian citizens will continue to shift and evolve. With this lack of clarity, institutions across Europe will need to be prepared for high numbers of Ukrainian nationals to remain in their countries, or to migrate from other destinations in Europe, for the foreseeable future. Particularly as we can also see that many displaced Ukrainians are putting down roots by taking up employment and securing new homes as well as settling their children into local schools.

## Reasons for choosing their host country

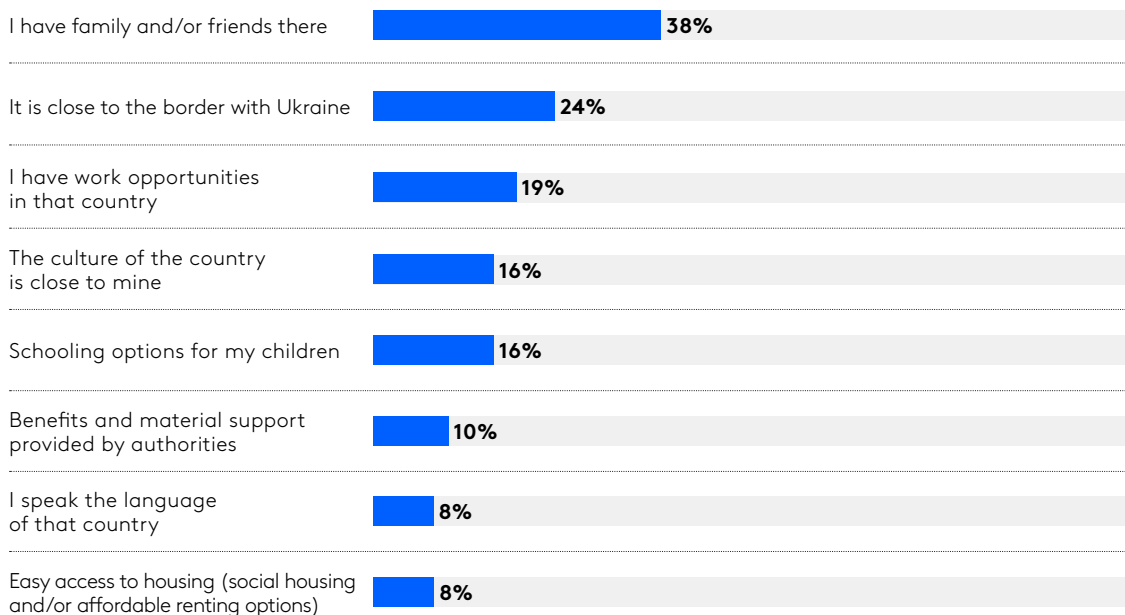
Along with the uncertainty of returning to Ukraine, 26% of respondents residing in an EU country are unsure whether they will continue to stay in their current host country or move. Several contributing factors are at play here, including:

The desire to be close to family/friends	38%
The proximity of the location to Ukraine	24%
Job opportunities	19%
Education for their children	16%

Other reasons were based on similarities in culture (16%), support provided by authorities (10%), and proficiency in speaking the country's language (8%).

It's no surprise then that, according to the United Nations High Commissioner for Refugees (UNHCR), the main European countries hosting displaced Ukrainians are Poland (more than 1.5 million), the Czech Republic (more than 500,000), Bulgaria (more than 150,000), Romania (more than 120,000) and Slovakia (more than 110,000)<sup>1</sup>.

### Reasons for choosing preferred destination country



Source: Voice of Ukraine Panel

\*Base: 2,674, all respondents outside Ukraine to choose up to three reasons.

<sup>1</sup> Tally of the refugees from Ukraine registered for Temporary Protection or similar national protection schemes in Europe : [Situation Ukraine Refugee Situation \(unhcr.org\)](#)



## 02 Integration remains challenging

As many Ukrainians plan to stay in their host countries, individuals have been faced with multiple obstacles that have hindered their ability to integrate into their new communities. Following our panellists who settled in the EU between March-April 2022, our research analysed various factors to gauge the extent to which they have successfully been able to integrate.

This study covered key areas such as; language skills; ability to establish social networks; ability to find a job; and their personal perspective on the extent of their own integration.

### Limited knowledge of the host country language

More than 10 months after the arrival of our displaced Ukrainian panellists, language abilities continue to be a critical factor determining the extent to which they have successfully integrated within their new host country. Our most recent wave discovered only 20% of respondents had sufficient reading skills in the country's language, and only 12% could express themselves when it came to familiar topics or sharing their opinion.

However, the journey to integration has made some progress, albeit slowly. 82% of our panellists had started to learn about the culture and society of the host country, and in January 2023, 66% of respondents reported they had started a local language course, a 9-percentage point increase since October 2022 (57%).

We know from our previous report that most respondents class themselves as highly educated (65%), with 59% having a bachelor's degree or higher - yet they still struggle to find employment due to their proficiency with the host country's native language. This reinforces the importance and urgency for policymakers and organisations to provide easily accessible language learning resources to enable displaced Ukrainian nationals to find suitable and fulfilling employment opportunities.

<sup>4</sup> <https://www.kantarpublic.com/inspiration/centre-kantar-public-sur-leurope/voice-of-ukraine>



## Communities continue to expand as displaced Ukrainians settle

A sense of community prospers among displaced Ukrainians as they unite during difficult times. Focusing on our qualitative phase, respondents recognised the comfort they felt when meeting with other displaced Ukrainians, as illustrated by the quote from a Voice of Ukraine panellist below.

However, this may have conversely impacted their path to integration, as by seeking out others with whom they have a shared connection in preference to native citizens, they continue to find it difficult to integrate with the local population.

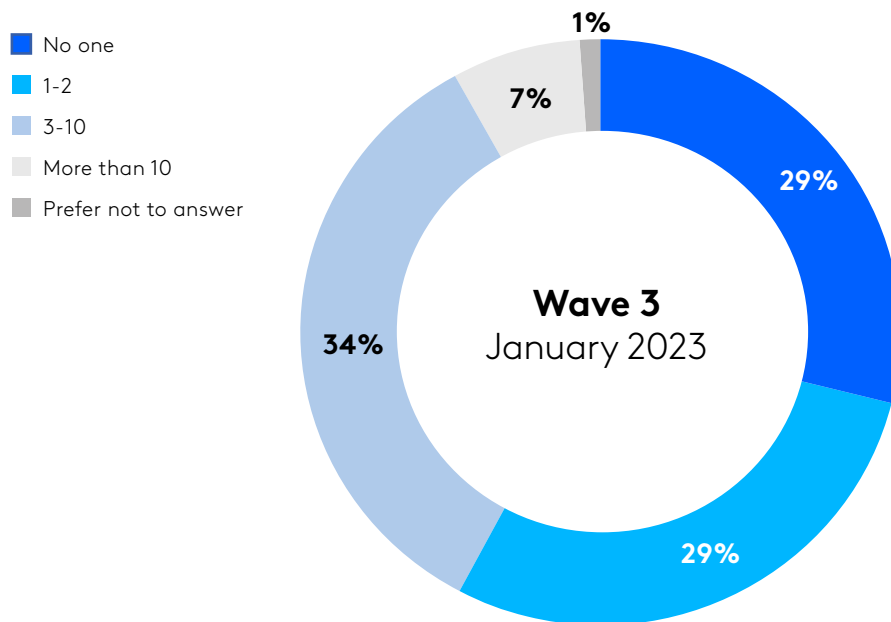
“Wherever we meet, we get to know each other there. In a supermarket, a gas station, in a park... Where we hear our native language, we stop. We exchange phone numbers with some of them and continue to communicate, meet in parks, walk with children.”

The percentage of respondents who stated they had ‘no friends’ among citizens of the host country in October 2022 remains the same in the most recent wave at 29%.

Although the number of respondents who consider themselves integrated is increasing, from 15% in October 2022 to 17% in January 2023, the percentage still remains low.

Furthermore, only 1 in 3 consider themselves welcome in their host city.

How many friends among your nationality do you have in the city you currently live in?



Source: Voice of Ukraine Panel, Wave 3

\*Base: 1,565, all respondents to Wave 3 outside Ukraine

<sup>7</sup> Standard Eurobarometer 70, autumn 2008

## Income and employment rates: different trajectories by country

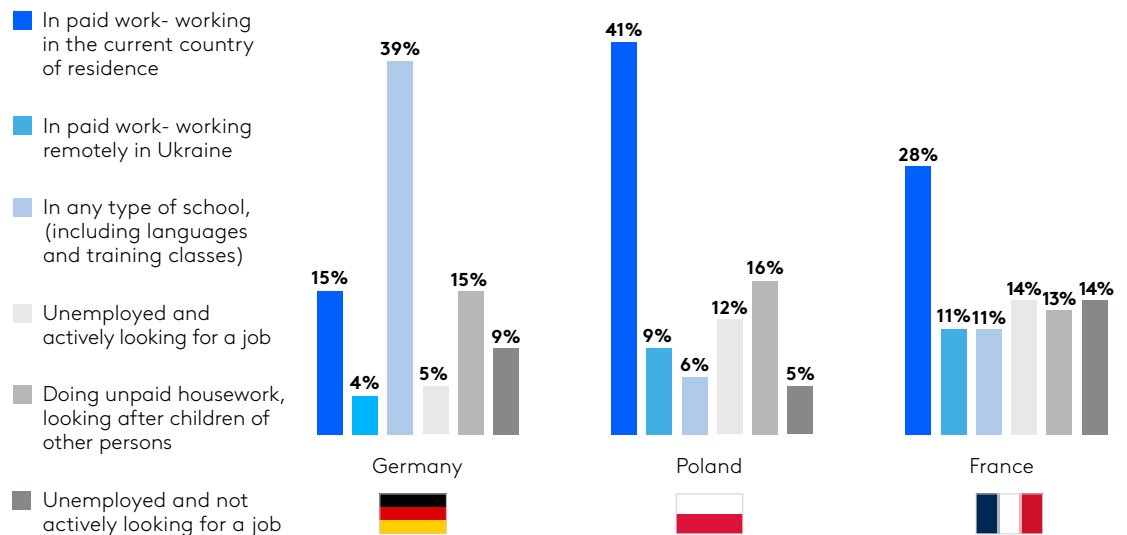
Income and employment rates are important factors to consider when attempting to understand the extent to which Ukrainian citizens are able to settle and integrate within their host countries. In our latest round of research, 29% of respondents reported that they had paid work in the host country within four weeks before the research took place.

There is a notable difference in the employment situation for displaced Ukrainian nationals, depending on which country is hosting them currently.

50% of panellists in Poland have found work, with 12% actively looking for a job and only 6% stating they're in education or training.

This differs from Germany where the employment rate for displaced Ukrainians who participated in our latest study is at 18% and 5% are looking for employment, with the majority stating that they are in education (39%). For those who settled in France, 39% are working, 14% are seeking work, and 11% are in education or training. The differences in employment or education status correlate with the rate at which panellists are integrating within their host country.

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



Source: Voice of Ukraine Panel, Wave 3

\*Base: 1565, all respondents to Wave 3 outside Ukraine



## A positive view of the European Union

Given that nearly half of the respondents reported relying on governmental aid as their primary source of income, it was crucial to evaluate the level of satisfaction among displaced Ukrainians regarding the aid they received.

According to our latest study, 62% of Ukrainians expressed that they were satisfied with the support provided; a decline of 6 percentage points from the previous wave in October 2022 (68%).

During the qualitative phase, the testimonies we collected suggested displaced Ukrainians who arrived in the EU initially had a positive perception of the EU, but it's possible that respondents were not fully aware of the differing roles and responsibilities between the European Union and their respective host country.

However, there have been notable improvements of satisfaction rates concerning the assistance received from their respective host countries (72%). In the Netherlands, satisfaction reached 90% for the support they had received, 87% in Germany and Belgium, 83% in Romania, 69% in Poland, and 65% in France. Italy had the lowest satisfaction rate of all EU countries, at 31%.

# 03 Trust in influential countries, international organisations, and Ukrainian institutions

Another aspect we focused on through the study was the perception of the diplomatic and geopolitical roles that influential countries and international organisations have played in the conflict so far, as well as their perception of Ukrainian institutions.

## Countries playing a role in the war

Focusing on country-level patterns, our study examined the level of trust our respondents have in relation to seven countries which have played a significant role in the war on Ukraine: China, France, Germany, Poland, Turkey, the United Kingdom and the United States.

Among the EU countries, there is a noteworthy gap between the highest and lowest ranking countries in terms of the levels of trust that our panellists have in each of them. For example, our study revealed that 89% of respondents expressed trust in Poland, while only 48% trust France.

This could be attributed to France's efforts to mediate with Russia, suggesting a correlation between perceived trust levels with those countries which choose to adopt a firm stance against Russia rather than demonstrating a potential willingness to compromise.

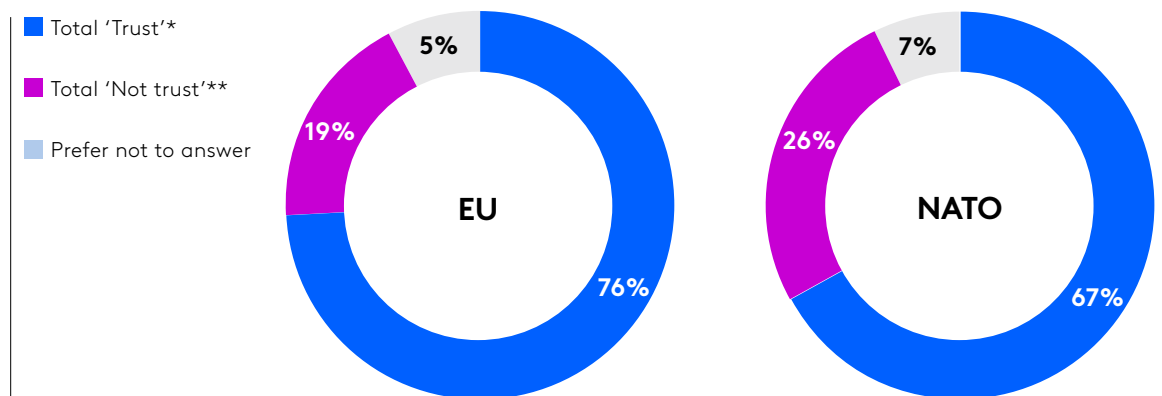
### To what extent do you trust each of the following international institutions?

\* Total 'Trust' regroups items 'Totally trust' and 'Tend to trust'

\*\* Total 'Not Trust' regroups items 'Do not trust at all' and 'Tend not to trust'

Source: Voice of Ukraine Panel, Wave 3

Base: 1,619, all respondents to Wave 3



Turkey, a country known for taking a role of official mediator on several occasions during the conflict, is only trusted by 1 in 3 of our respondents, and China takes the lowest ranking with just 7% of respondents indicating that they trust China.

Additionally, trust levels appear to vary based on the location where the respondents have settled. For example, among the respondents who have settled in France, 68% express trust in their host country, whilst we see a similar trend in Germany (77%) and 97% of those based in the UK indicate that they have trust in their host country.

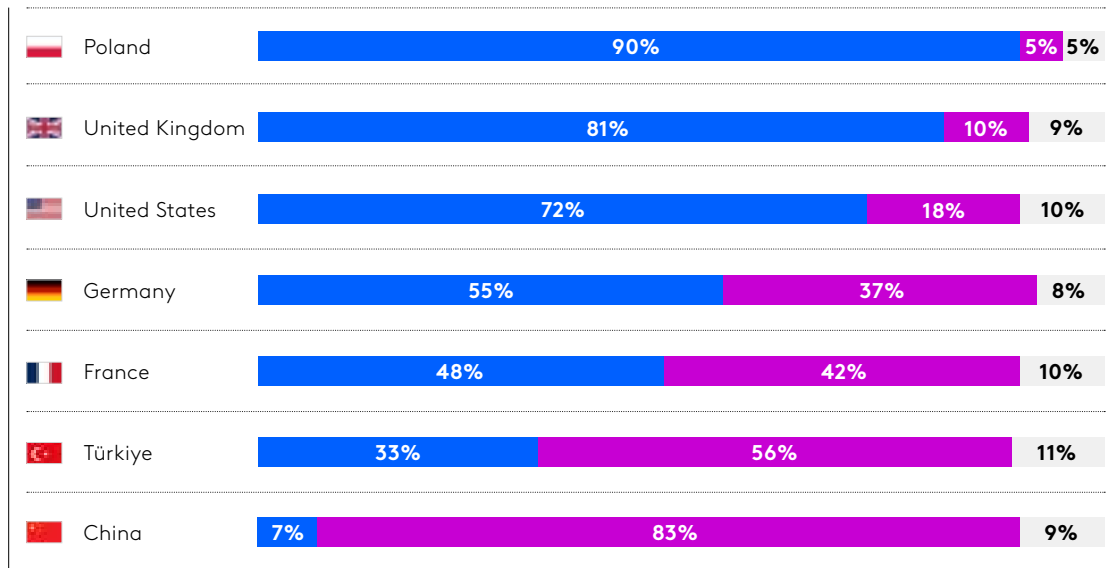
We also see that this data further correlates with the satisfaction rates respondents have given in relation to the support they have received from their host country. Satisfaction rates reached 89% in Poland, and over 94% in the UK, Latvia, and Estonia. In comparison, France and Germany received lower satisfaction response rates at 71% and 70% respectively.

**To what extent do you trust each of the following countries?**

- Total 'Trust'\*
- Total 'Not Trust'\*\*\*
- Prefer not to answer

\* Total 'Trust' regroups items 'Totally trust' and 'Tend to trust'

\*\* Total 'Not Trust' regroups items 'Do not trust at all' and 'Tend not to trust'



**Trust in Ukrainian institutions**

In our latest wave, we asked respondents about their level of trust in several Ukrainian institutions. Overall, confidence was low in state institutions, apart from the Ukrainian army, which was a remarkable exception: 93% stated they trusted the Ukrainian army, with 61% of all respondents expressing complete trust in them.

It is not surprising that this exception exists, considering 45% of respondents have a close relative participating in frontline operations, while 81% have friends or acquaintances among frontline military personnel.

This clearly exhibits the heavy and direct involvement of displaced Ukrainians' loved ones within the military effort.

Ukrainians appear deeply divided regarding trust in their government. Just over half (54%) expressed trust in their government, with a 51% trust rate for the police, and a general feeling of distrust in the Ukrainian judicial system at 21%. Notably, women express more confidence in Ukrainian institutions than men, with a clear difference of 9 percentage points.

# Conclusion

With the war continuing and the possibility of returning to Ukraine seemingly distant for many displaced Ukrainians, it has become even more important for policymakers and institutions to provide adequate resources to support the ongoing integration of displaced Ukrainian nationals into their host country; specifically investing in language courses that would create further opportunities when seeking employment.

Focusing on these challenges should also be approached with a necessary long-term vision: depending on diverse personal factors, significant contingents of Ukrainians are starting to believe staying and living in the European Union will be long term.

As a result of this, the European Union and its Member States need to implement definitive solutions that allow these individuals to build a life within Europe and contribute fully to the societies that they are now part of.

## 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 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. 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@kantar.com](mailto:marco.pelucchi@kantar.com)

## About Centre Kantar Public sur l'Europe

Centre Kantar Public sur l'Europe provides pan-European analysis and opportunity for debate on the social, cultural, economic, political and environmental challenges facing the European Union and its member states.

Bringing together a pan-European team of researchers with deep expertise in political and public opinion polling, social and economic trends and migration, it provides a longer term perspective, above the polls, with a distinct European viewpoint.

Centre Kantar Public sur l'Europe publications and events provide a broad view of the challenges for European nations, from democracy to populism, inequality to migration.

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