

KANTAR PUBLIC



Understanding and addressing the needs of Ukrainian refugees

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.

Introduction

Almost a year after the Russian invasion, Ukrainians in Europe are preparing themselves to settle down, and now intend staying for a longer period of time in their respective 'host' countries across the European Union (EU).

To provide regular and evidence-based insight into the continually evolving situation, Kantar Public has set up a dedicated panel of displaced Ukrainian nationals, located across the EU, to provide first hand perspectives and insight into the extent they are able to successfully integrate, and their changing needs and priorities.

Given both the speed at which the war has evolved, and the extent to which Ukrainian nationals have been displaced, it has been challenging to build a clear picture of their changing needs against a backdrop of different country situations and individual and family requirements. To address this, Kantar Public's pan-European research team, involving experts from our Brussels, French and Polish offices, designed a responsive and bespoke online panel to gather first-hand data and insight on the challenges and intentions of displaced Ukrainians in the EU. The intention behind this study is to provide the data and evidence, to assist policymakers and organisations in the design of solutions to meet the needs of displaced Ukrainian communities for the immediate, and longer term.

To face this challenge, Kantar Public recruited more than 8,000 respondents who are displaced Ukrainian nationals, from across Europe during the first wave of our research. Among those respondents, 5,000 agreed to be contacted again to participate in future studies and 1,014 from the first wave of research, also contributed to this second wave. Six months after the launch of the first 'Voice of Ukraine' study, Kantar Public presents its second set of findings and analysis from our unique European longitudinal study which explores the latest views of displaced Ukrainians.

We intend to develop our 'Voice of Ukraine' study as a longitudinal survey to not only gather data, but monitor the evolution of needs, situations, and migration trajectories of displaced people across the EU. Two research waves have now been completed and we are currently working on the third wave of research and analysis. The online panel we have recruited, provides us with a mechanism for conducting agile data gathering, which has already been used to inform the European Bank for Reconstruction and Development's (EBRD) Transition Report¹.

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

01

Displaced Ukrainian nationals still display high levels of uncertainty regarding their future destination and plans, 10 months after their arrival in their EU host countries

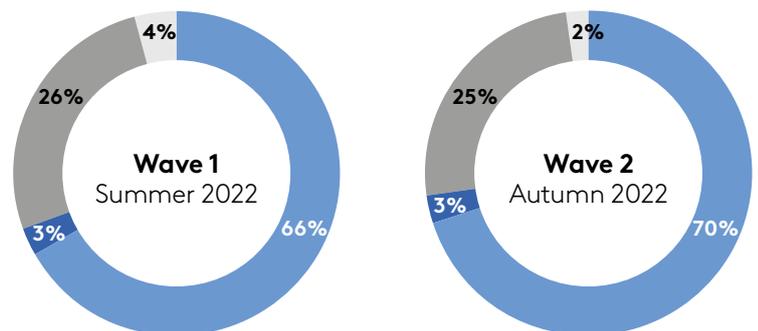
According to the United Nations High Commissioner for Refugees (UNHCR), almost 8 million Ukrainians are now in Europe and, as our data showed during the first wave, their levels of uncertainty regarding which country they see as their final destination, is significantly high². Our most up-to-date results confirm that this uncertainty is still relevant, as 25% of displaced Ukrainians do not know if they have reached their preferred destination outside Ukraine. Therefore, continuing to monitor and report their movements across Europe is an essential input to help inform the ongoing development of relevant and impactful public policies at both a national and EU level.

93% of our panellists reported that they are still in the same country as they were during the first wave of research, with only 4.5% of our panellists reporting that they had returned to Ukraine during the period between our first and second waves³ of research. Even if a large majority of displaced Ukrainian citizens remain in the same country, they were in six months ago, it appears that this may not be an accurate predictor of their migration intentions longer term. In fact, when asked about their migration trajectories and if they had reached their final preferred destination, 70% (+5pp) of respondents who remain outside of Ukraine planned to stay in the country they were currently in for the time being, while 25% (-3pp) didn't yet know if they planned to stay in the same country or leave for another one soon.

Given the lack of clarity regarding a resolution to the current war in Ukraine, displaced citizens are still more short term in their thinking and remain unclear of their plans and intentions longer term.

Have you reached your preferred destination outside Ukraine?

- Yes, I plan to stay in the current country for the time being
- No, I plan to go to another country, outside Ukraine, soon
- Don't know yet
- Prefer not to answer



Source: Kantar Public - Voice of Ukrainians in Europe panel

A large majority of displaced citizens expressed a clear desire to go back to Ukraine either very soon or once it is safe to return (69%), while 19% don't know what their plans are, and 11% intend to settle outside Ukraine. However, when asked to picture themselves after the war and think about their future, 50% of the respondents answered they definitely want to live in Ukraine once the war is over, 37% of respondents are unsure if they want to remain in the current country of residence or if they want to return to Ukraine, and 10% reported definitely wanting to live in the country where they currently reside.

² <https://www.kantarpublic.com/inspiration/centre-kantar-public-sur-leurope/voice-of-ukraine>

³ The first wave is still ongoing since June 2022. The second wave took place between 21st September to 13th November 2022.

This 19-percentage point difference between the certainty of wanting to live in Ukraine sometime in the future and returning to Ukraine after the end of the war, illustrates how difficult it is for displaced Ukrainian nationals to have a clear perspective on their future at this point in time. We can see that whilst the majority of Ukrainians in Europe do intend to return to Ukraine, however, when offered an opportunity to express their uncertainty, a significant proportion chose to do so.

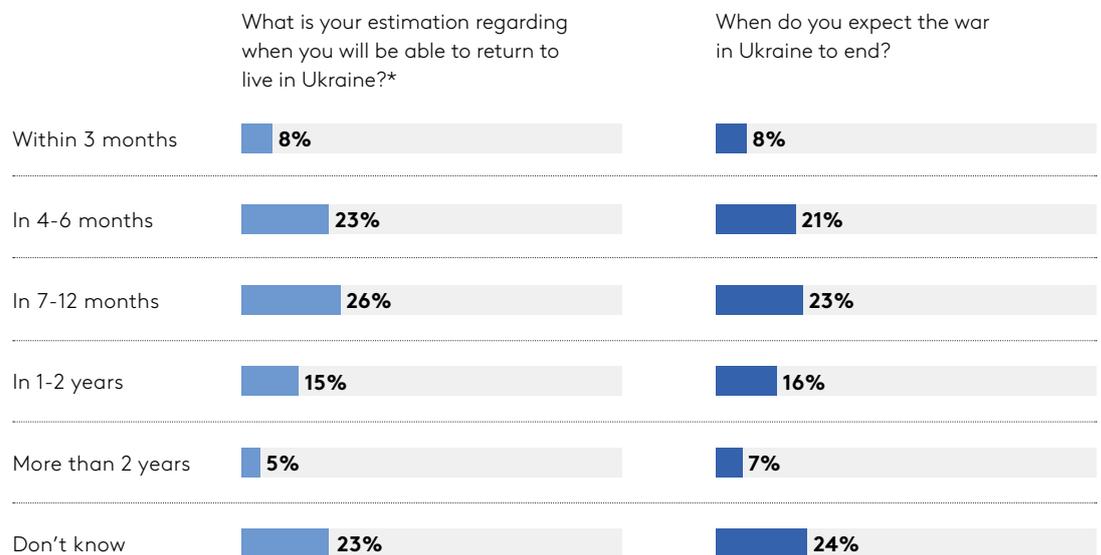
The state Ukraine will be in post-war is a major consideration that will ultimately inform the choice displaced Ukrainians make to either stay in the EU or head back home to rebuild their lives there.

Given the uncertainty over plans and final destinations, the decision to extend Temporary Protection for displaced Ukrainian nationals through to March 2024 is a likely prudent.

Among those planning ultimately to return to Ukraine, 26% estimate that they will be able to do so within 7-12 months, whilst 15% have a longer timeline of between 12 months to two years. However, there is still a significantly high proportion (23%), who don't know when they will be able to return to Ukraine. Unsurprisingly, respondents' views of how long they believe the war will continue for seems to determine the point in time when they perceive they might be able to return home to Ukraine. This is reflected in the data, with 24% of the total respondents stating they have no idea when the war might end, and an almost equal proportion (23%) being more optimistic and anticipating that the war will end in the next 7-12 months. A slightly lower proportion (16%) anticipate that the war will not end for a further one to two years.

The speculation around the end of the war and intentions to return are strongly linked.

Estimation about return and presumed end of war



Source: Kantar Public - Voice of Ukrainians in Europe panel - Autumn 2022

*Base: those willing to return to 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.



02

Ukrainians are settling gradually into their host countries – with access to work and education being strong drivers of integration into local communities

One of the main objectives of our second wave of research, was to monitor and therefore better understand, the extent to which displaced Ukrainian citizens have been able to integrate into their new communities in their host countries. Almost a year into the war, the reality is that the situation for displaced Ukrainians is no longer just a short-term solution, and they are now actively needing to shift their perspectives to the medium term, and possibly longer term reality.

Having a job helps to speed up the integration process by increasing financial independence and the likelihood of being able to access private accommodation.

We are seeing this shift through the increase in the number of respondents who have either secured paid work in their host country (32%), are actively job hunting (15%) or have started taking language or training classes in the past four weeks (33%).

In June 2022⁴, 39% of respondents reported using their own savings to pay for their daily expenses, whilst in the latest round of research this proportion has dropped to 29%. In our latest research, 41% of the panellists stated they use income from paid employment to pay for expenses, which is an increase of 10% from June 2022. However, financial support from the authorities remains the main financial source with 45% of respondents saying that they pay for their daily expenses through the financial support they receive from their host government (+3pp).

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

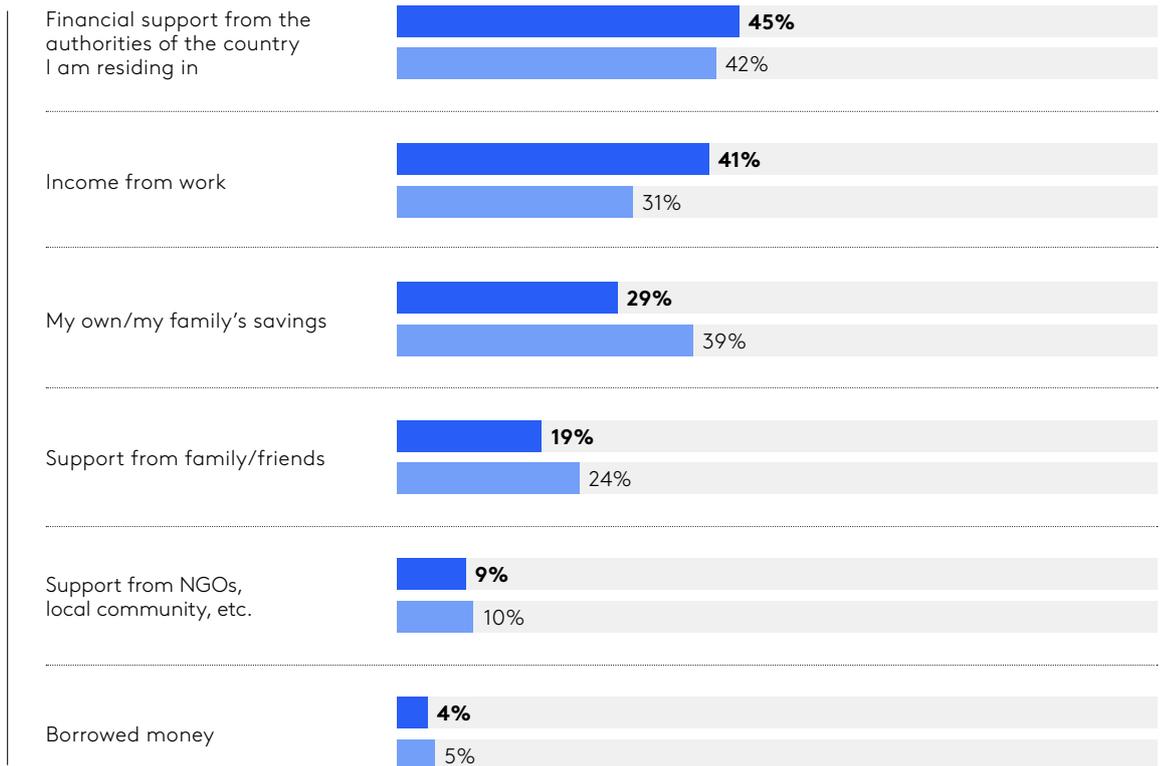
02 Ukrainians are settling gradually into their host countries – with access to work and education being strong drivers of integration into local communities

How do you pay for your everyday expenses in the country you are currently residing in (COUNTRY)?

Multiple choice question

■ **Wave 2** Autumn 2022

■ **Wave 1** Summer 2022



Source: Kantar Public - Voice of Ukrainians in Europe panel

Housing and accommodation are an important factor in the extent to which Ukrainian citizens are able to settle and integrate within their host countries. In our latest round of research, we see a significant increase (+17pp) in the proportion of displaced Ukrainian nationals who are now in private accommodation which they are renting themselves – up to 42% from an original starting point of 25%. This has led to fewer numbers being hosted by family (7%, - 6pp), friends (5%, - 2pp) or a local host family (15%, - 5pp) compared to six months prior.

However, despite there being some positive progress in relation to those who are increasingly able to secure their own private accommodation, there is still a need to focus on those who are still dependent on emergency accommodation and support. For those who remain in emergency situations, successful integration is more difficult and challenging. 16%

of our panellists are still in separate accommodation provided temporarily by local authorities, and 6% reported living in a reception area, refugee camp or pop-up container village. This is a slight increase on our previous round of research with responses up 3% and 1% respectively.

It should be recognised that the emergency responses to immediate housing and shelter needs, enacted by Member States in the early months of the conflict, were successful in addressing the urgency of the situation. Going forward, the emphasis for host countries is now on identifying more sustainable and practical solutions to issues such as housing. These long-term solutions are needed to better meet the current needs of displaced citizens from Ukraine, to support them in rebuilding their lives in Europe. Meeting these challenges requires a deep understanding of where to focus specific efforts to improve the overall integration process.

⁷ Standard Eurobarometer 70, autumn 2008

03

A rapid and impactful response to the situation, but significant obstacles to integration remain

With the extended time that Ukrainians are now planning to stay in their host countries, and alongside the challenges they are facing in respect to integration, it is not surprising that wellbeing and sense of isolation and mental health is a concern for many displaced Ukrainians.

Given the importance of this topic, we dedicated a section in our latest study to better understand how our panellists were feeling about their current situation and some of the critical factors which may influence the extent to which they are able to integrate within their host countries – or not. For example, a significantly high proportion of our panel (91%) feel like outsiders and 83% stated that they only feel ‘little to moderately integrated’.

However, on a more positive note, a fairly high proportion of our respondents (86%) reported feeling welcome in their host cities with over a quarter of these (28%), stating that they felt this ‘always or often’.

When asked about the extent to which our displaced Ukrainian panellists had been able to make local friends, over half (54%) reported that they had made between 1-5 local friends in the town or city where they live currently. However, almost a third (29%) reported that they had been unable to make any local friends. The data, therefore, shows a mixed picture. We have some areas where we can see partial success in relation to displaced Ukrainians building relationships and friendships within their new communities, but there is still a relatively high proportion who

are still very isolated and who are struggling more with the challenges of integration. This is likely due to a number of factors.

Language skills are a crucial asset in the integration process and making friends or finding a job requires displaced people from Ukraine to understand and communicate through their new host country’s language on a daily basis. However, our Voice of Ukraine study shows that a high proportion of respondents (66%) feel that they are unable to express themselves in the country’s language when it comes to familiar topics or sharing their opinion. Half of our panel estimates they can read and understand simple newspaper articles written in their host country’s language, but the other half indicates the opposite.

With regards to finding paid employment in their new host country, 63% of our panel reported finding it difficult to search for a job. In addition, among those respondents who classed themselves as highly educated during the first questionnaire, 36% reported not being able to use their degree in the country they were currently in. This particular challenge is one that is familiar, as it has arisen during previous refugee arrivals in Europe. But it is an important consideration for both the EU and those individuals it specifically relates to, as high-level expertise and skills are not being fully utilised in their new host countries. Whilst the intention behind the Temporary Protection is to support displaced Ukrainians to find jobs corresponding to their workplace skills, the reality is that there are still many barriers which need to be overcome.

Please evaluate your own language skills of the destination country

How well can you do the following when using the language of (COUNTRY)?

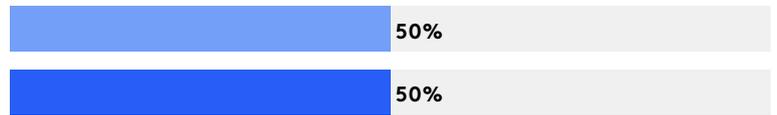
- Total 'Not well'
- Total 'Well'

Source: Kantar Public - Voice of Ukrainians in Europe panel - Autumn 2022

In a conversation, I can speak about familiar topics and express personal opinions.



I can read and understand the main points in simple newspaper articles on familiar subjects.



Even though a majority (68%) of displaced Ukrainians are satisfied with the measures taken by the EU to help them, this percentage can be seen as low given the extent of the measures which have been put in place.

In response to the Russian aggression in Ukraine, European institutions have taken swift and effective action to provide extensive support for Ukrainian nationals who have been displaced. This has also been underpinned by strong support from the European public, with 90% of EU citizens who participated in the Standard Eurobarometer 97, agreeing with the measures that have been put in place to support displaced Ukrainians⁵.

More specifically in Poland, where the majority of displaced Ukrainians have settled, almost all (91%) of Polish citizens, support the welcoming of Ukrainians into their country. However, considering the extent of the support measures and the unprecedented use of resources, only 68% of respondents from our Voice of Ukraine panel, are satisfied with the help provided by the EU. In our next Voice of Ukraine study, we will look to identify in more detail the reasons behind why displaced Ukrainian nationals feel that the support has not gone far enough.



⁵ Standard Eurobarometer 97, Summer 2022



Conclusion

In summary, a significant number of displaced people from Ukraine are settling down in their host country. However, their integration into their new communities is a challenge for them, as well as the European Union and its Member States. After having deployed substantial and extensive resources dedicated to facilitating the arrival of Ukrainians, the European Union should now be able to accompany and support them in their quest for integration.

There are a number of factors which may further support integration including, continuing the provision of long-term accommodation, assisting displaced Ukrainians to learn their host country's language, and finding better ways to enable people to find jobs equal to their qualifications and skills. Moreover, institutions, working hand in hand with local associations, need to ensure

that the integration of Ukrainians takes place through the construction of social links, which are crucial for a strong and lasting integration, and which importantly support overall mental health and wellbeing.

Focusing on these challenges should also be approached with a necessary long-term vision: depending on diverse personal factors, significant contingents of Ukrainians may decide to stay and live in the European Union, even after the war is over. Temporary Protection, as the name suggests, is a medium-term temporary solution as it is only renewable three times. Its more than beneficial impacts have been proven time and again. But over the medium and longer term, 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.

A focus on those who have returned to Ukraine

As stated previously, a small share of our panel which accounts for 4.5% are back in Ukraine. We have dedicated a specific part of our survey to this part of the population who face different sorts of challenges. It is interesting to note that more than a third left the EU to return to Ukraine in August, with four out of ten people who returned to Ukraine located either in the city of Kyiv or in the region of Kyiv. The main reasons for returning were to join spouses or relatives (33%) and homesickness (10%). Half of these respondents do not intend to leave Ukraine again⁶.

⁶ This is an aggregated share of the people who responded, "definitely not" and the one having responded "probably not" to the question "Do you plan to leave Ukraine again to live in another country?"

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@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.

Find out more here: <https://www.kantarpublic.com/inspiration/centre-kantar-public-sur-leurope>



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