

How large will the Ukrainian refugee flow be, and which EU countries will they seek refuge in?

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Three weeks after the Russian invasion of Ukraine more than three million people have fled the war. Knowledge and predictions on the flow of migrants are important for politicians and other decision makers handling this situation. In this Delmi Policy Brief, data from the Gallup World Poll showing Ukrainians' willingness to move and preferred destinations before the war is presented. This data can be used as a point of departure when examining how the flows of displaced persons to the EU may develop. This Policy Brief is written by Mikael Elinder (Uppsala University), Oscar Erixson (Uppsala University), and Olle Hammar (Research Institute of Industrial Economics and Institute for Futures Studies).

The situation in Ukraine before the invasion

On February 24, 2022, Russia launched its full-scale invasion of Ukraine, a country with 44 million inhabitants. Within three weeks, more than three million Ukrainians had fled to several countries in Europe. Two million have reportedly entered Poland and more than a million have fled to Romania, Moldova, Hungary, and Slovakia. Almost 200 000 people have also fled to Russia. UNCHR estimates that another million will flee from Ukraine and that

more than 12 million will need emergency protection and assistance within Ukraine (UNCHR 2022a, March 19). The situation is changing rapidly and the uncertainty of how the conflict will develop makes it hard to estimate how many will leave the country and when they will be able to return in a safe and orderly way.

Poverty was widespread in Ukraine even before the launch of the full-scale invasion. Ukraine's GDP per capita is a fourth of Sweden's and just below half of Russia's (World Bank 2020).¹ The threat from Russia has also created much uncertainty and insecurity in the last years. Estimates by UNHCR gather that 850 000 Ukrainians were internally displaced in 2021 (UNHCR 2022b, March 16). Furthermore, data from the global survey Gallup World Poll (GWP) show that more than a quarter of the adult population in Ukraine desired to permanently move to another country if possible.

On March 4, the European Union (EU) activated the Temporary Protection Directive for the first time. The Temporary Protection Directive allows for refugees from Ukraine to automatically receive immediate temporary residence and work permits in the EU for at least a year and the possibility of extending it for an additional two years. The directive also allows for children granted temporary permits to attend school and receive medical care. Individual countries that receive a large number of refugees may find it difficult to offer a reasonable standard of living for them over an extended period of time. The cooperation of the EU in receiving Ukrainian refugees during the coming period is therefore an acute political issue. Will EU member states choose to redistribute refugees among member states or will Ukrainians themselves be allowed to choose their country of destination? Will those countries receiving a larger share of refugees be compensated economically?

Almost 13 000 individuals born in Ukraine lived in Sweden in 2021, of which almost a third were women (Statistics Sweden 2021). From the outbreak of the full-scale invasion until March 17, almost 14 000 persons (mainly women and children) had been registered as in need of protection with the Swedish Migration Agency (2022a, March 19). However, the registrations may not tell us much about the actual number that has arrived in Sweden. Even before the activation of the Temporary Protection Directive, Ukrainians were able to

¹ In 2020, Ukraine's PPP-adjusted GDP per capita was 12 000 USD, compared to 26 000 USD in Russia and 51 000 USD in Sweden (World Bank 2020).

travel to Sweden without a visa and could stay for up to 90 days before applying for either a temporary residence or work permit. The Swedish Migration Agency (2022b, March 11) has presented three possible scenarios for the flow of Ukrainian refugees to Sweden: either 27 000 (low), 76 000 (medium), or 212 000 (high) Ukrainians will seek protection in Sweden before June 2022. The actual number to enter Sweden, either directly or through a possible redistribution of refugees between EU member states, is impossible to know as many factors are unsure, not least how the war will develop.

The EU and Russia have been the primary destinations of Ukrainian migrants in the last decades (Fedyuk and Kindler 2016). One explanation for this is that the EU has been an attractive destination for Ukrainians since they can enter without a visa, and the EU has also been liberal when granting residence permits for Ukrainians. In 2020, 600 000 residence permits were issued for Ukrainians with the absolute majority of these (490 000) issued by Poland (Eurostat 2020). The second largest recipient was the Czech Republic followed by Hungary. Poland's popularity can be partially attributed to the cultural connections and geographical proximity, but primarily it is due to a close cooperation regarding migration between the two countries that allows for inhabitants to move and work in the two respective countries (Brunarska et al. 2016). As opposed to many other migrant groups, where family reunification and studying are the primary reasons for migration, Ukrainians has primarily entered the EU to work (Brunarska et al. 2016). Most of them has also stayed in the EU afterwards (Fedyuk and Kindler 2016).

Aim

This Policy Brief describes the countries that Ukrainians would like to live in if they had the opportunity. The results are based on interviews with a representative selection of adults in Ukraine conducted during the years 2007–2021. The interviews are thus conducted before the outbreak of the war. The aim is to use the data to show how large a share of the Ukrainian population that wished to move to another country and to which country they would have like to move to, before the war broke out. The focal point is the EU member states, in effect, those countries connected to the Temporary Protection Directive.² This choice is made as it stands to reason that many of those that either have fled or will flee the conflict will attempt to enter these

² Denmark has an opt-out in the Area of freedom, security and justice (AFSJ) and is exempted from the Temporary Protection Directive.

countries. By finding out the preferred countries of destination of Ukrainians before the war, we may be able to get an indication of the coming migration flows. Based on this, we present numbers on how many individuals that may seek protection in each EU country and compare these numbers with how many refugees each country would receive if the distribution of Ukrainian refugees were made in proportion to the population size of each country.

Knowledge and predictions of future migration flows are important for politicians and other decision makers, like authorities such as the Swedish Migration Agency, in their work of planning and preparing. Data relating to historical and current migration flows are often deemed insufficient and too dependent on context to allow for reliable estimates of future migration flows (Willekens et al. 2016). Considering these challenges, researchers have started using surveys on people's desire or intention to migrate. The advantage of this kind of data is that it is often easily accessible, comparable between countries and over time, and has proven useful in predicting future migration flows (Tjaden, Auer and Laczko 2019).

Method and data

The results of this Policy Brief are based on data from the Gallup World Poll (GWP), which in turn is based on yearly surveys in 160 countries and regions. The sample of each country consists of at least 1 000 individuals, representative of the population aged 15 years and older, making it the largest representative survey in the world. According to the GWP, more than 99 percent of the world's population is represented.

This Policy Brief focuses on the Ukrainian participants. According to the last census, conducted in 2001, ethnic Ukrainians form the overwhelming majority of the country, 78 percent. The second largest ethnic group are Russians (17 percent) and other groups constitute less than one percent each. Following Russian aggression and annexation of the Crimean Peninsula in 2014, the GWP has excluded the inhabitants of Crimea as well as the separatist regions of Donetsk and Luhansk (these three regions account for around 10 percent of the total population of Ukraine). It is thus a fair assumption that results from the GWP are mainly representative of ethnic Ukrainians, and only to a lesser extent of ethnic Russians living in Ukraine.

Our results are based on data for the years 2007–2021, with the exception of 2020 when not all questions were asked. The latest survey was conducted in

July 2021. The reason for not choosing just 2021 is that the analysis would then be based only on a small sample, meaning that the uncertainty of the results would be larger.³ We have thus chosen to use information from all years when the GWP survey was conducted (and the relevant questions were asked). In total, the sample consists of 14,301 individuals for these years. The surveys were conducted face to face during home visits except for 2021 when the interviews, due to covid, were conducted via telephone.⁴

For this Policy Brief, we use the following GWP question: *Ideally, if you had the opportunity, would you like to move permanently to another country, or would you prefer to continue living in this country?* Those who answered that they desired to move permanently were asked a follow-up question of which country they would like to move to.⁵

The number of respondents saying that they would like to move to another country is informative as it indicates how many Ukrainians would like to leave Ukraine in a situation without a full-scale war, when it was also harder to gain residency in many countries. It can thus be seen as an underestimation of how large share of the population that can be assumed to flee under a worse security situation and with improved conditions for receiving either temporary residence or a work permit in Europe.⁶

The assumption made in the analysis is that the wishes expressed in the GWP of where to move can serve as a rough reflection of the preferred destinations amongst those who have fled and those that will flee the war.

³ 35 percent reported in the 2021 survey that they desired to migration to another country. Comparing this to previous years, the number is unusually high, and it is difficult to say if this can be attributed to a worsening security situation in Ukraine or if there are other causes.

⁴ In accordance with GWP's recommendations, we use sample weights from GWP to make the sample representative for the full Ukrainian population.

⁵ The first question is WP1325 and the second is WP3120. The questions were posed in either Ukrainian or Russian depending on the wishes of the responder. Around 9 percent answered that they did not know or wanted to respond, and are therefore excluded from the analysis.

⁶ Several European countries that are not members of the EU, such as Norway, Switzerland, and the United Kingdom, have announced that they will be receiving Ukrainian refugees. Moldova has also already received close to 400 000 refugees from Ukraine (UNCHR 2022a, March 19).

Results

During the years 2007–2021, slightly more than one fourth (26 percent) of Ukrainians stated that they had a desire to move to another country.⁷ This corresponds to about 12 million people. Of those expressing a wish to move, around half (47 percent) wanted to move to an EU country. Outside of the EU, the three most popular countries were the United States (15 percent), Russia (13 percent), and Canada (6 percent). In the current situation it is, however, most likely that most of those fleeing Ukraine will come to the EU.

The table below shows the distribution of where respondents wishing to move to the EU wanted to live. Around a third (36 percent) stated that they wished to move to Germany. The second most favoured country was Poland (15 percent), followed by Italy (11 percent). In terms of popularity, Sweden is placed ninth: 2.5 percent of the respondents wished to move to Sweden. Several countries with a larger population than Sweden are less popular. As an example, only 0.4 percent stated that they wished to move to Romania.⁸ Countries such as Belgium are also notable with only 0.5 percent of respondents expressing a wish to move there.

The table also shows how many Ukrainians that would arrive in each receiving country for every one million refugees leaving Ukraine, if allocated according to their stated preferences. The last column shows the arrival of Ukrainians per country (again, for every one million refugees leaving Ukraine) if they were to be allocated in proportion to the population size of each country. According to these estimates, more than three times as many would arrive in the Czech Republic, and twice as many to Germany and Poland, compared to how many would arrive if the allocation of Ukrainian refugees were done proportionally. Under the assumption that 12 million Ukrainians are forced to flee, it is estimated that 300 000 will arrive in Sweden, which is only slightly more than if the distribution was done proportionally. It is however notable that some of the larger countries, such as France and Spain, are underrepresented in comparison to their size. Some of the countries that have already received many Ukrainian refugees, such as Romania and Hungary, are countries that in the survey were not very

⁷ Those expressing a desire to migrate are overrepresented among younger respondents, but in terms of gender, income and education levels, they are roughly representative for the Ukrainian population.

⁸ Romania is today the EU country, after Poland, that has received most Ukrainian refugees (UNHCR 2022a, March 19).

popular. It can thus be assumed that many of those that have entered Romania or Hungary may seek to travel to other EU countries, such as Germany.

Table 1 Estimation of Ukrainians seeking protection by EU country.

| Rank | EU-country | Percentage that wishes to live in each country | Number per one million refugees | Number with a proportional allocation |
|------|----------------|--|---------------------------------|---------------------------------------|
| 1 | Germany | 35,6% | 356 100 | 185 900 |
| 2 | Poland | 15,4% | 154 400 | 84 700 |
| 3 | Italy | 10,9% | 109 400 | 133 000 |
| 4 | France | 7,3% | 72 600 | 150 500 |
| 5 | Czech Republic | 7,0% | 70 000 | 23 900 |
| 6 | Spain | 5,3% | 53 100 | 105 700 |
| 7 | Netherlands | 2,9% | 29 100 | 38 900 |
| 8 | Austria | 2,9% | 28 800 | 19 900 |
| 9 | Sweden | 2,5% | 25 000 | 23 100 |
| 10 | Denmark | 1,6% | 16 500 | 13 000 |
| 11 | Portugal | 1,4% | 14 400 | 23 000 |
| 12 | Greece | 1,4% | 13 900 | 23 900 |
| 13 | Slovakia | 0,9% | 9 400 | 12 200 |
| 14 | Hungary | 0,8% | 7 600 | 21 800 |
| 15 | Finland | 0,7% | 6 900 | 12 400 |
| 16 | Belgium | 0,5% | 5 000 | 25 800 |
| 17 | Croatia | 0,4% | 4 300 | 9 000 |
| 18 | Romania | 0,4% | 3 900 | 43 100 |
| 19 | Estonia | 0,4% | 3 900 | 3 000 |
| 20 | Luxembourg | 0,4% | 3 700 | 1 400 |
| 21 | Bulgaria | 0,3% | 3 400 | 15 500 |
| 22 | Lithuania | 0,3% | 2 500 | 6 200 |
| 23 | Latvia | 0,2% | 2 000 | 4 200 |
| 24 | Cyprus | 0,1% | 1 400 | 2 700 |
| 25 | Ireland | 0,1% | 1 200 | 11 200 |
| 26 | Slovenia | 0,1% | 1 200 | 4 700 |
| 27 | Malta | <0,1% | 300 | 1 200 |

Source: Own calculations based on Gallup World Poll, 2007-2021.

Note: Blue markings indicate that the number of refugees in our calculations exceeds the number of refugees given a proportional allocation.

Final comments

Data from the Gallup World Poll (GWP) show that, even before the war, a quarter of the adult population in Ukraine wished to move to another country if given the opportunity. Many of these wished to move to an EU country. In this Policy Brief we have shown how many that stated that they wanted to live in each EU country. The assumption being that this also has bearing on which countries Ukrainian refugees now might go to.

It is not certain that it is the same persons fleeing today who previously stated that they wanted to move to a different country. For various reasons, it is mainly women and children that are fleeing right now, not least since men between the ages 18–60 are not allowed to leave the country. It is also not certain that a country someone previously may have wanted to move to is the same country that that person now will attempt to reach. Yet it is probably likely that the countries that were ranked high in preferred destinations for migration before the outbreak of war are countries in which many Ukrainians still see that they have a good chance of living a better life. It might be because of friendship or family connections, or a chance of improving their standards of living. These are factors that by all accounts are reasonable to assume have importance for people fleeing war as well. It can also be assumed that countries deemed attractive if given the choice of voluntary migration remain attractive in cases of forced migration.

An important result is that Germany is the country that most Ukrainians desire to move to, with 36 percent of respondents stating that it was their preferred destination. About 2.5 percent of the respondents listed Sweden as their preferred choice, which correlates with the population size of Sweden (2.3 percent of the total EU population). In this sense, Sweden is neither especially popular nor unpopular with Ukrainians. If the flow of Ukrainian refugees is consistent with the data from GWP, it is highly likely that the issue of a proportional distribution of refugees will be high on the political agenda.

As previously noted, it is difficult to make predictions on how many will be forced to flee Ukraine. But it is worth noting that nearly 12 million Ukrainians expressed a desire to migrate according to the GWP surveys. For many, this desire has likely increased, rather than decreased, since the outbreak of war. It is also reasonable to assume that many who did not previously have a desire to migrate now see a need to leave. On the other hand, it is also

reasonable to assume that some now feel a stronger bond with their country and more than before wish to remain.

From the estimates presented here, 12 million Ukrainians may try to leave the country. Countries outside of the EU, such as Moldova and Russia, have hitherto received many Ukrainian refugees, but in the current situation it is highly likely that most will attempt to reach EU countries. If we assume that 12 million refugees leave Ukraine to seek refuge in an EU country and that 2.5 percent leave for Sweden, this will mean that closer to 300 000 Ukrainians would come to Sweden. The number according to these estimates by far exceeds the highest scenario of 212 000 given by the Swedish Migration Agency. The final outcome remains to be seen and is largely dependent on how the crisis develops.

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The authors are fully responsible for the report's contents including its conclusions and policy recommendations.



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