

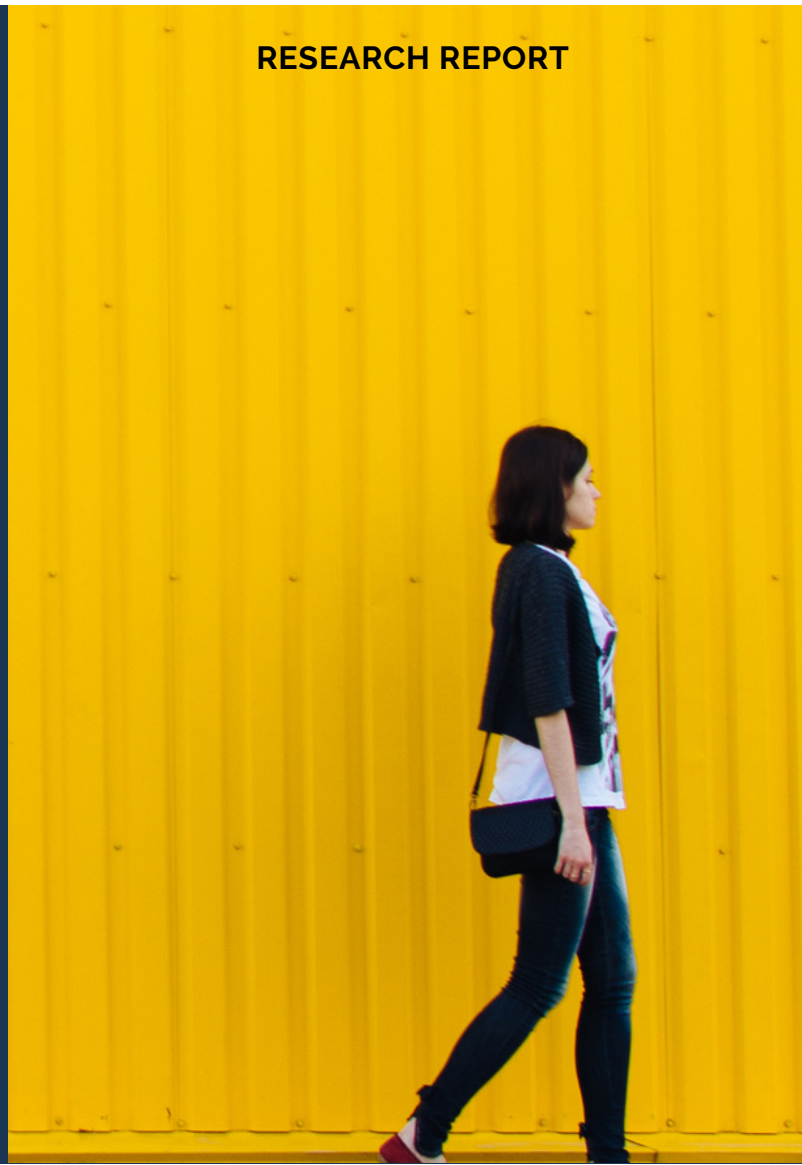
JULY 2023

# THE SAME OR DIFFERENT?

PRE-WAR MIGRANTS  
VS. REFUGEES  
- COMPARISON 2022-2023

The survey was conducted using the CAWI technique among adult Ukrainian citizens residing in Poland. The survey was conducted on the Manulo survey panel. The first edition was conducted in March, April and May 2022 on a sample of 457 respondents, of whom 228 were refugees and 229 were pre-war migrants. Meanwhile, the second edition was conducted in May 2023, with a sample of 550 respondents. Among them, 291 were refugees and 259 were pre-war migrants.

RESEARCH REPORT



# INTRODUCTION

*This is the second survey we have conducted among pre-war migrants and refugees from Ukraine. The first was conducted in March, April, and May 2022. Among other things, we asked respondents about their situation in the labor market, having friends and family in Poland, where they lived, their knowledge of the Polish language, the difficulties they faced after arriving in Poland, and their plans for the future.*

*The survey showed that the two groups of respondents, despite coming from the same country, differed. Pre-war migrants are people who left the country most often voluntarily because they made the decision to do so and decided to seek better-paying work abroad. Refugees are people who did not plan to leave but were forced to do so by warfare. The former most often knew where they were going, had contacts - friends, family, at least some knowledge of the Polish language and, importantly, were going with the idea of taking a job and were prepared to do so. Among refugees, knowledge of the country of immigration, and possible contacts in the form of family, distant relatives or acquaintances, was far less. The 2022 survey found that they did not know the Polish language, which was a barrier to taking a job.*

*For the first time, we asked respondents about their income and spending structure. Ukrainian citizens are becoming increasingly important customers for many companies, as evidenced, for example, by advertisements and product information prepared in Ukrainian.*

## EXPERTS' VIEWS



**Dr. Sabina Kubiciel - Lodzińska**  
**Faculty of Economics and Management**  
**Opole University of Technology**

*"Migration processes are very dynamic, so it is essential to monitor them regularly. This is all the more necessary in Poland, which has very quickly transformed from an emigration country to an immigration one.*

*Systematic research into both the needs of immigrants and analyzing the attitudes of Poles toward foreigners are important elements of migration management. This is all the more important because we do not have a migration policy in Poland. The increase in the number of immigrants is a challenge for health care, education, and they are also potential voters. Studies relating to migration processes are therefore worth conducting periodically, as they can show the current needs, for example, in terms of integration activities among both foreigners and Polish residents.*

*In order to manage migration in the long term, we lack, first of all, reliable data on the number, demographic characteristics, and education of the people coming to us. Without this knowledge, it is not possible to conduct migration policies."*

## EXPERTS' VIEWS

*"The Ukrainian community in Poland was already significant before the Russian aggression against Ukraine. This conflict significantly intensified the influx of people to Poland and other European countries. For some Ukrainian citizens, Poland is only a stop on the road*

*further emigration or a place where they look forward to the possibility of returning to their country. Others, in turn, see our country as their final destination.*

*As part of our research, we are trying to understand how Ukrainians participate in everyday life and how their activities are woven into the daily social fabric. We are interested in how they interact not only with people, but also with institutions, brands and companies. Our goal is not only to observe current phenomena, but also to try to capture certain behaviors that may emerge in the future in the context of an influx of immigrants from other countries.*

*The second phase of our research made it possible to note the differences that have occurred over the year, as well as how the situation of Ukrainians in Poland has changed.*

*We are confident that the knowledge contained in our survey will contribute to a deeper understanding and appreciation of the role Ukrainians play in our society."*



**Maciej Maj**

CEO of Openfield sp. z o. o.

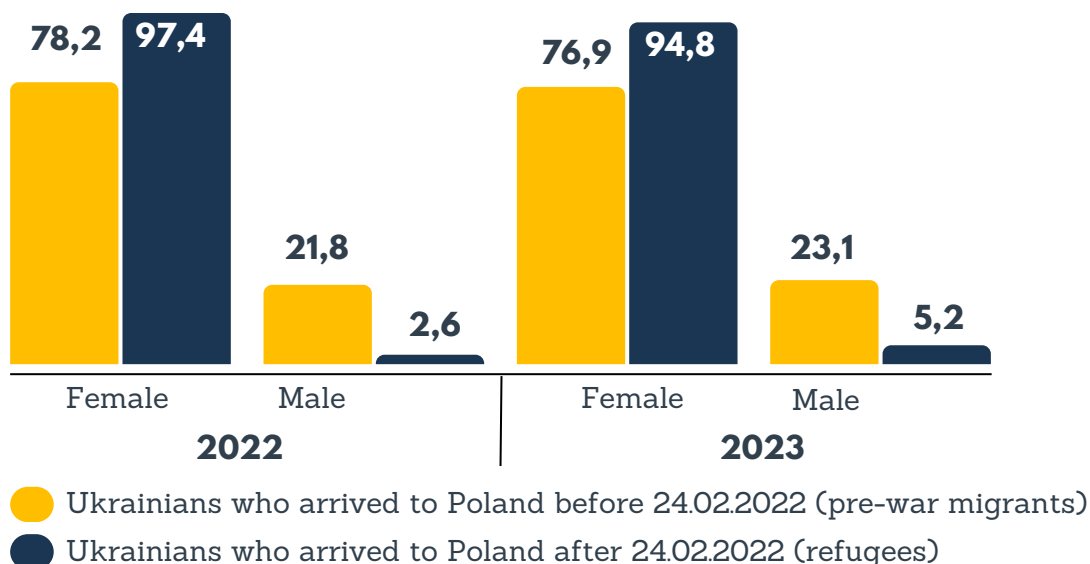


# RESEARCH RESULTS

## Respondents' characteristics

### GENDER

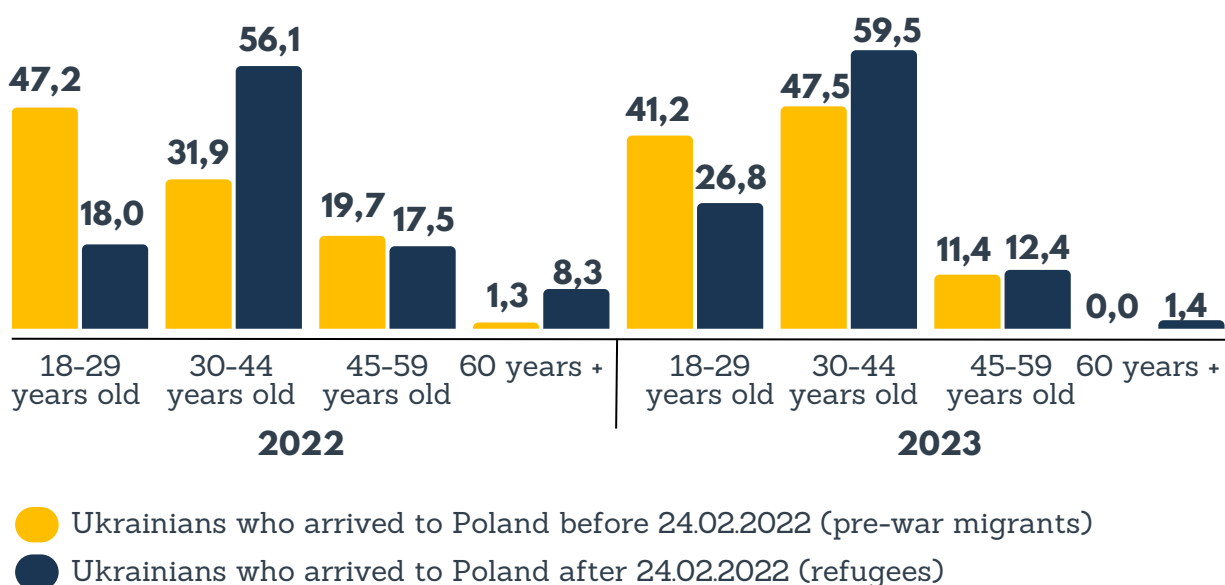
Between the survey conducted in 2022 and the 2023 edition, the structure of respondents did not change significantly. Women dominated in both rounds of the survey. They accounted for more than 70% among pre-war migrants - in both the first and second editions of the survey. Among refugees, women's shares were even higher, as they accounted for more than 90% in the surveyed group in both 2022 and 2023.



### AGE

In 2022, among pre-war migrants, the largest proportions were in the age range of 18-29 (47.2%) and 30-44 (31.9%). By contrast, among refugees, more than 56% of respondents were aged 30-44, and far fewer, 18%, were aged 18-29.

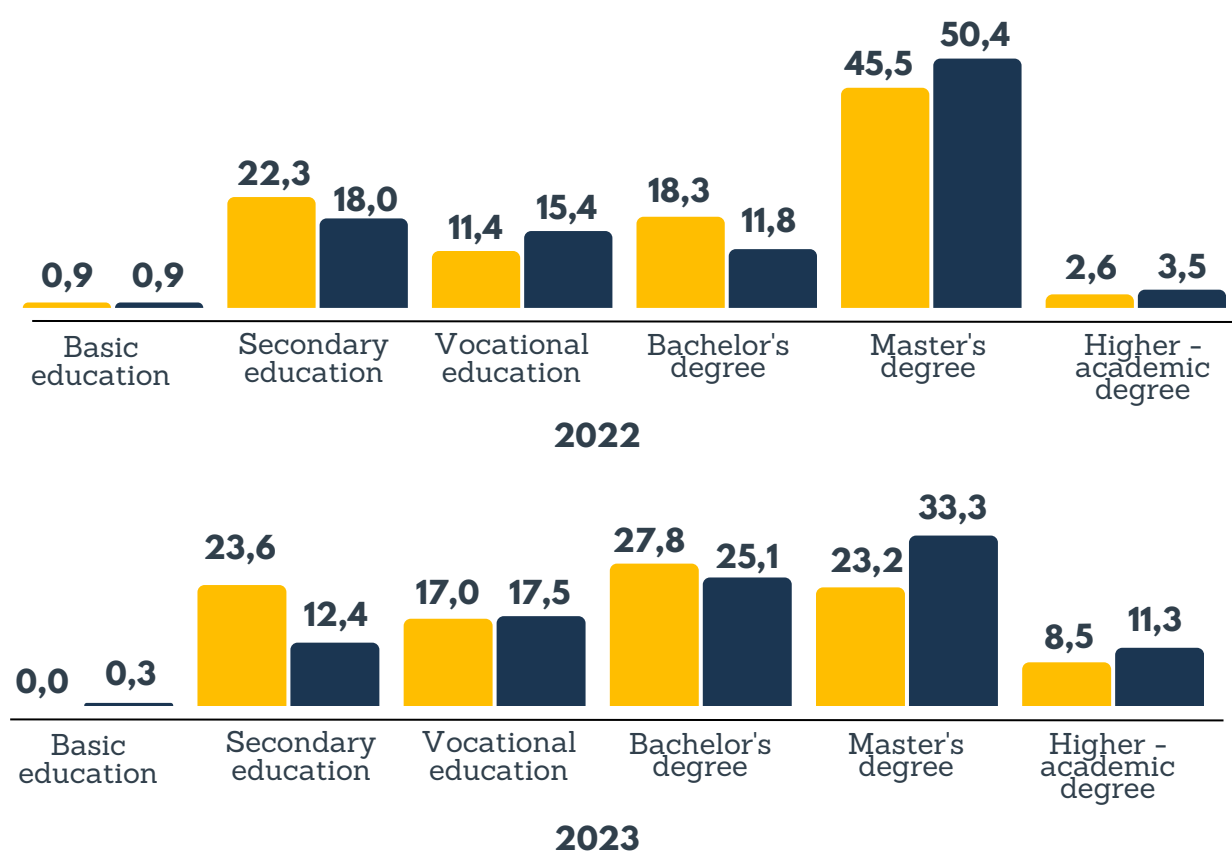
In the latest edition, the largest share - and among both pre-war migrants and refugees - were 30-44 years old. In both rounds of the survey, the smallest shares of respondents were in the oldest age group, 60 and older.



## Respondents' characteristics

### EDUCATION

In both editions of the survey, Ukrainian citizens were also asked about their education. The 2022 survey had the largest share of those with master's and bachelor's degrees. They accounted for 63% in the group of people who arrived before the outbreak of war and 62% among refugees, respectively. The second edition of the survey also recorded the largest shares of those claiming to have a university education. They accounted for 51% of pre-war migrants in the survey group and 58% among forced migrants.



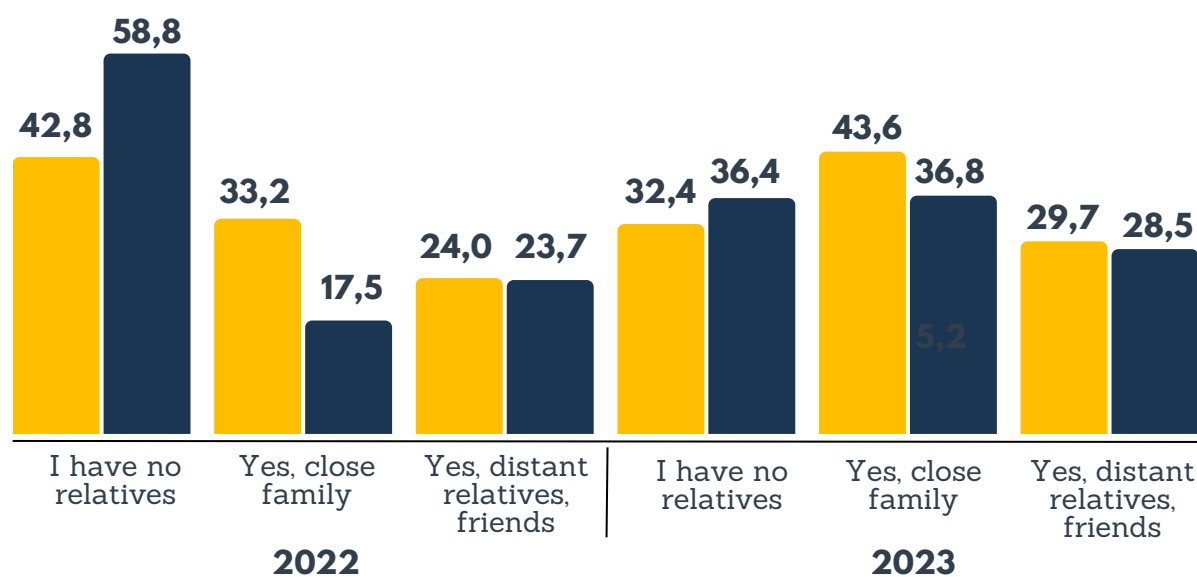
- Ukrainians who arrived to Poland before 24.02.2022 (pre-war migrants)
- Ukrainians who arrived to Poland after 24.02.2022 (refugees)

## Respondents' characteristics

### RELATIVES IN POLAND

Between the two rounds of the survey, changes can be observed regarding having contacts in Poland. In the group participating in the March-May 2022 edition, nearly 60% of those who arrived after Feb. 24 claimed to have no friends in Poland, which can be considered quite obvious, given their very short stay in Poland. Some 43% of pre-war migrants also said so. With the latter group, Ukrainian citizens were more likely to indicate that they had close family in Poland (33.2%) and further relatives and acquaintances (24.0%).

The May 2023 survey shows quite significant changes in terms of having social networks in Poland. There was a significant decrease in the share of responses regarding the lack of relatives in Poland. Only 32.4% among pre-war migrants and 36.4% of refugees said so. It is noteworthy that there was an increase in the share of responses indicating having close or extended family. This was true for both surveyed groups, i.e. pre-war migrants and refugees.



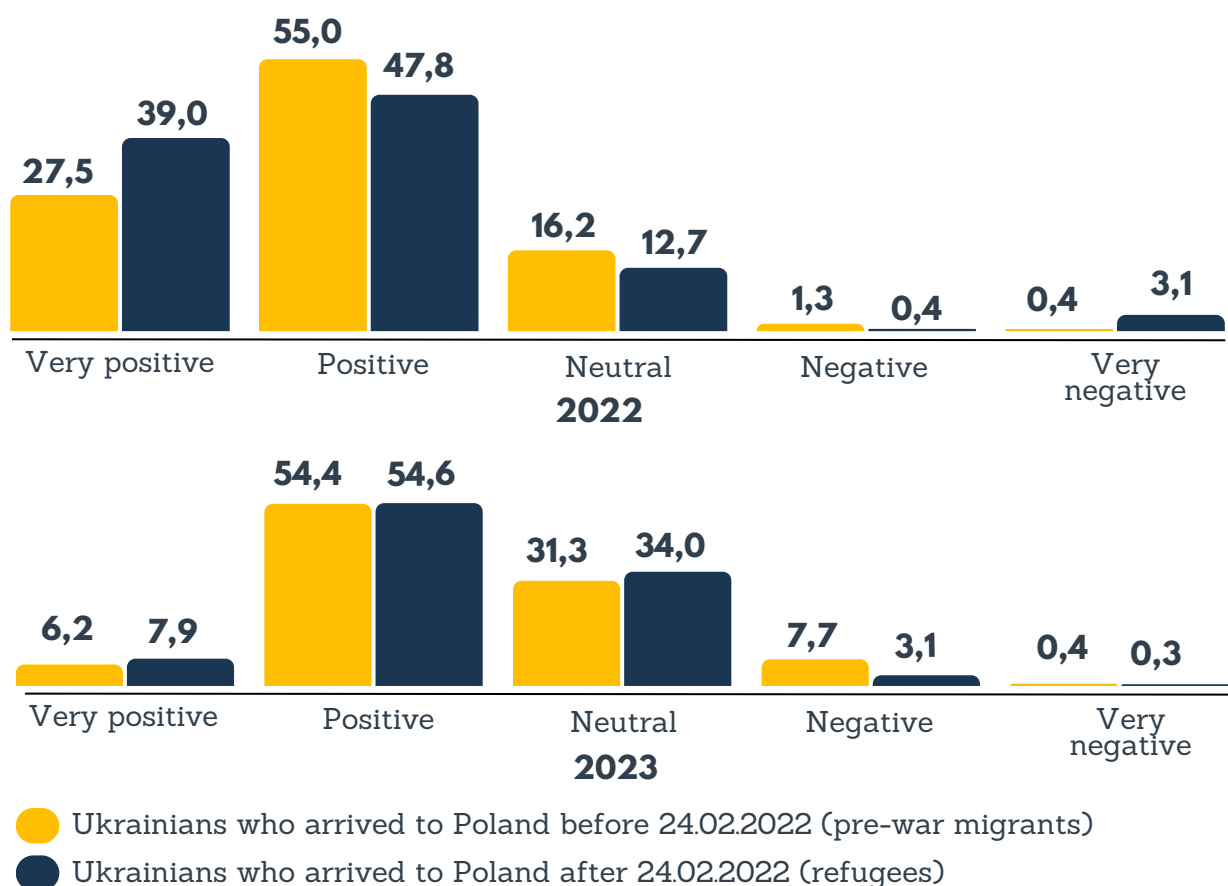
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# ATTITUDES OF POLES TOWARD UKRAINIAN SOCIETY

In 2022, both groups of respondents believed that Poles had very positive attitudes toward Ukrainians. At that time, the share of those convinced of this was higher among refugees (nearly 40%) than labor migrants (nearly 28%). 55% of pre-war migrants and nearly 48% of those who arrived after the outbreak of war were convinced of a positive attitude. In both groups, there was a small share of those believing that Poles have negative attitudes toward Ukrainians. Economic immigrants were slightly more likely than refugees to believe that Poles' attitudes were neutral (16.2% vs. 12.7%).

In 2023, the share of responses indicating very positive attitudes of Poles toward Ukrainians declined sharply. The perception of Poles' attitudes as positive remained at a comparable level among labor migrants, while among refugees it increased from 47.8% to 54.6%. More, about one-third of respondents believed that Poles' attitudes toward Ukrainians were neutral. There was also a slight increase in the share of responses in which respondents indicated that Poles' attitudes toward Ukrainian citizens were negative.

## What do you think is the attitude of most Poles towards Ukrainians?



# KNOWLEDGE OF THE POLISH LANGUAGE

According to the survey, Polish language skills have improved among both groups of migrants. Positive changes can be seen primarily among refugees. In the 2022 survey, more than 20% of respondents said they did not know Polish. In 2023, by contrast, only 6.2% of respondents said so. The share of refugees declaring knowledge of Polish at the B1 level (from 5.7% to 23.4%), i.e. at an intermediate level that allows communication, has definitely increased.

Knowledge of language	2022		2023	
A1	18,8%	48,7%	14,7%	34,4%
A2	15,3%	19,3%	13,1%	24,1%
B1	21,8%	5,7%	24,3%	23,4%
B2	24,9%	3,1%	25,5%	9,6%
C1	10,0%	0,4%	13,1%	0,7%
C2	5,2%	2,2%	8,5%	1,7%
I'm not familiar with	3,9%	20,6%	0,8%	6,2%

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# CURRENT PLACE OF RESIDENCE

Between the two rounds of the survey, changes can be seen in the nature of respondents' residence. In the 2022 edition, more than 48% of pre-war migrants lived in a rented apartment or house, and in 2023 this percentage rose to nearly 60%. However, even more significant changes in the nature of residence can be seen in the refugee group. In 2022, more than 32% of respondents enjoyed the hospitality of a Polish family, after a year it was less than 3% of respondents. The vast majority, nearly 60% of forced migrants, rent an apartment or house, and more than 20% rent a room in an apartment or house. This proves that pre-war migrants and refugees adapt to their new place of residence in a similar way.

Places of stay	2022		2023	
Hotel/ guesthouse	0,0%	3,9%	0,0%	2,7%
Parsonage/church facilities	0,0%	1,8%	0,0%	0,3%
I enjoy the hospitality of a Ukrainian family	0,4%	5,7%	0,0%	1,4%
I enjoy the hospitality of a Polish family	2,6%	32,0%	1,2%	2,7%
Staff hotel/hostel	5,7%	6,6%	1,9%	3,4%
Own apartment/ home	6,1%	0,0%	8,9%	1,4%
Dormitory	7,9%	4,4%	4,6%	5,2%
Rented room in an apartment or house	25,3%	10,5%	22,8%	21,6%
Rented apartment/ house	48,5%	27,6%	59,5%	59,8%
Other	3,1%	6,1%	1,2%	1,4%
Nowhere	0,4%	1,3%	0,0%	0,0%

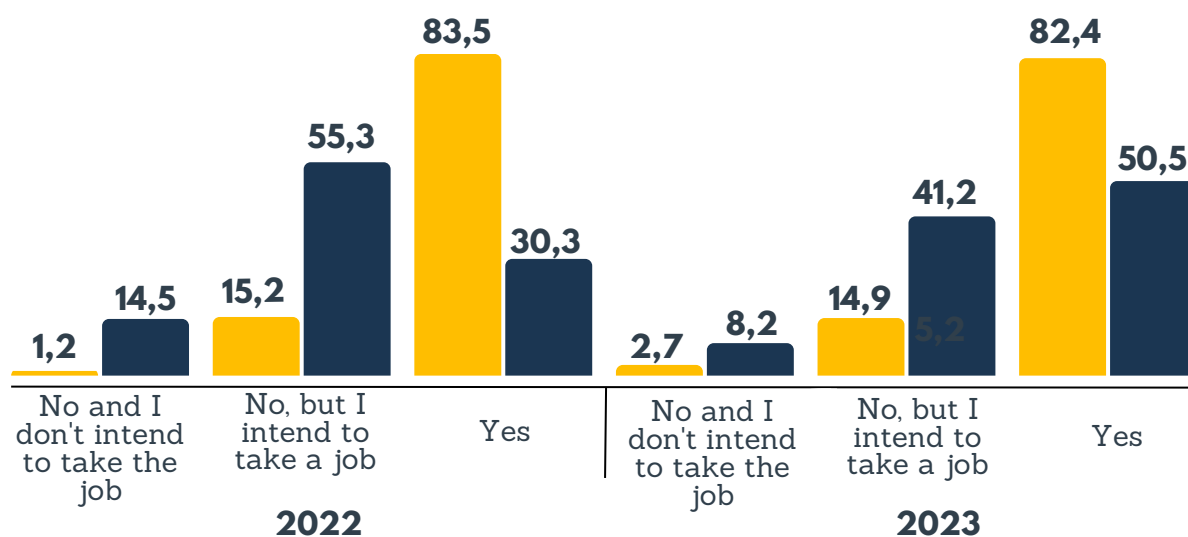
 Ukrainians who arrived to Poland before 24.02.2022 (pre-war migrants)

 Ukrainians who arrived to Poland after 24.02.2022 (refugees)

# WORK IN POLAND

Among pre-war migrants - in both 2022 and 2023 more than 80% were working in Poland. The changes in employment-taking can be seen primarily among refugees. The declarations of respondents show that in 2023 more than 50% of respondents were employed (in 2022 it was 30% of respondents). Among forced migrants, the share of those who did not work and did not intend to work also decreased (from 14.5% to 8.2%).

## Are you currently working?

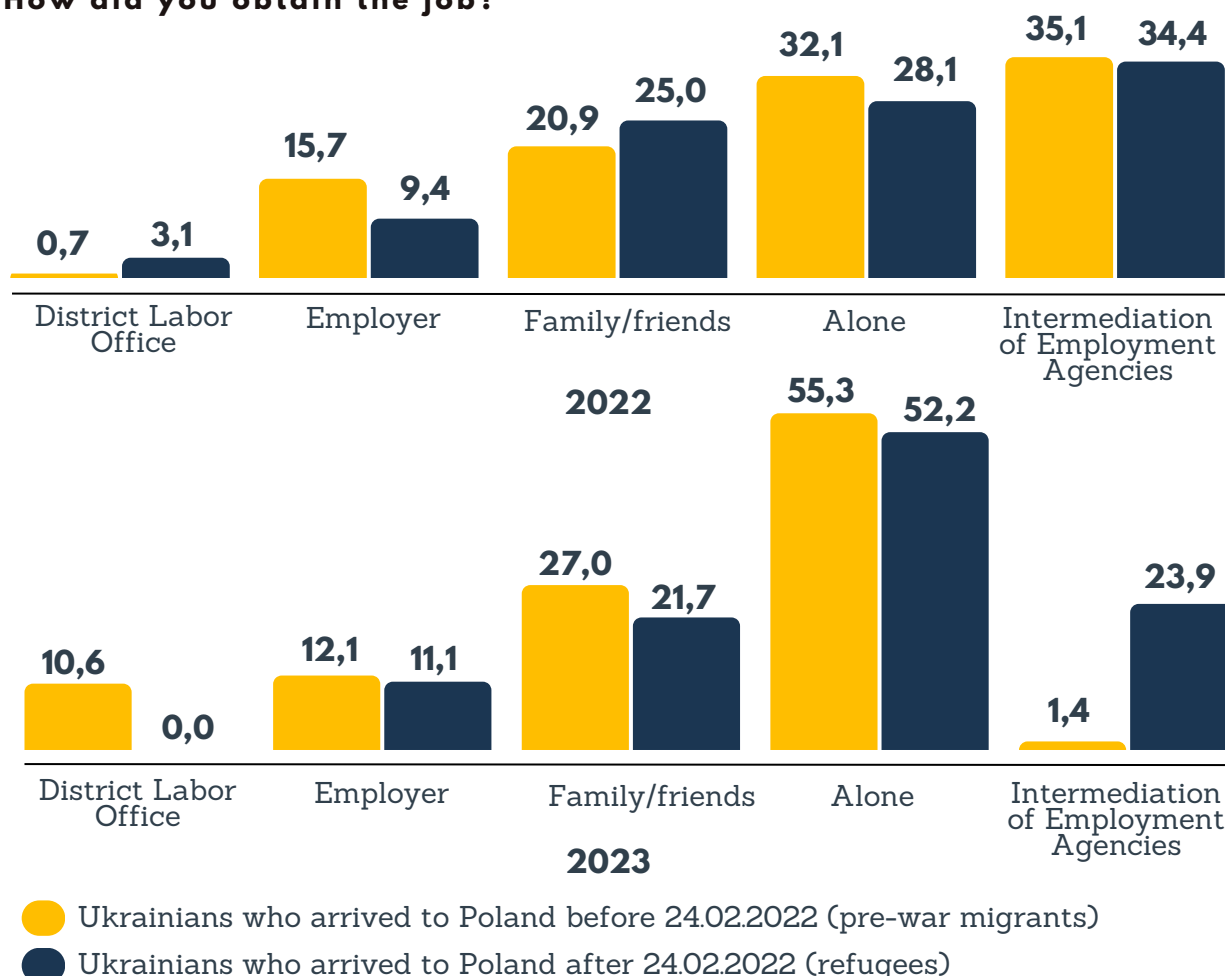


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# JOB ACQUISITION

Some changes can be seen in the way employment is obtained. In the 2022 survey of both the pre-war migrant and refugee groups, more than one-third of respondents said they obtained jobs through employment agencies. By contrast, in 2023, more than half of respondents in both groups said they found work on their own. This may indicate that both pre-war Ukrainian immigrants and refugees are increasingly free to navigate the Polish labor market. Interestingly, in the surveyed group, only 1.4% of Ukrainian citizens who came to Poland before the war claimed to have obtained employment through an employment agency. At the same time, among pre-war migrants, there was an increase in the use of the intermediation of district labor offices. Both pre-war migrants and refugees rely on family and friends to find work. In 2023, 27% of pre-war migrants and nearly 22% of refugees obtained jobs through social networks.

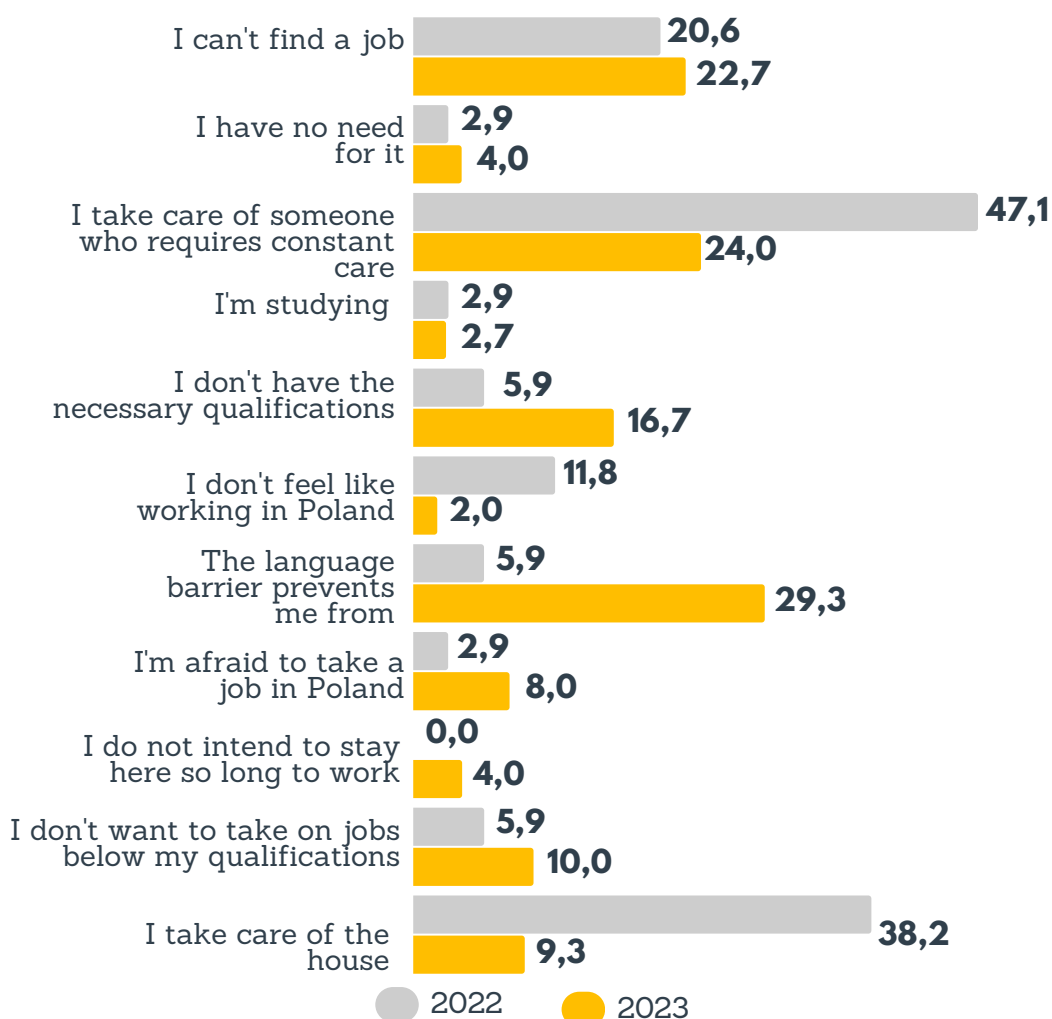
## How did you obtain the job?



# REASONS FOR NOT TAKING UP A JOB

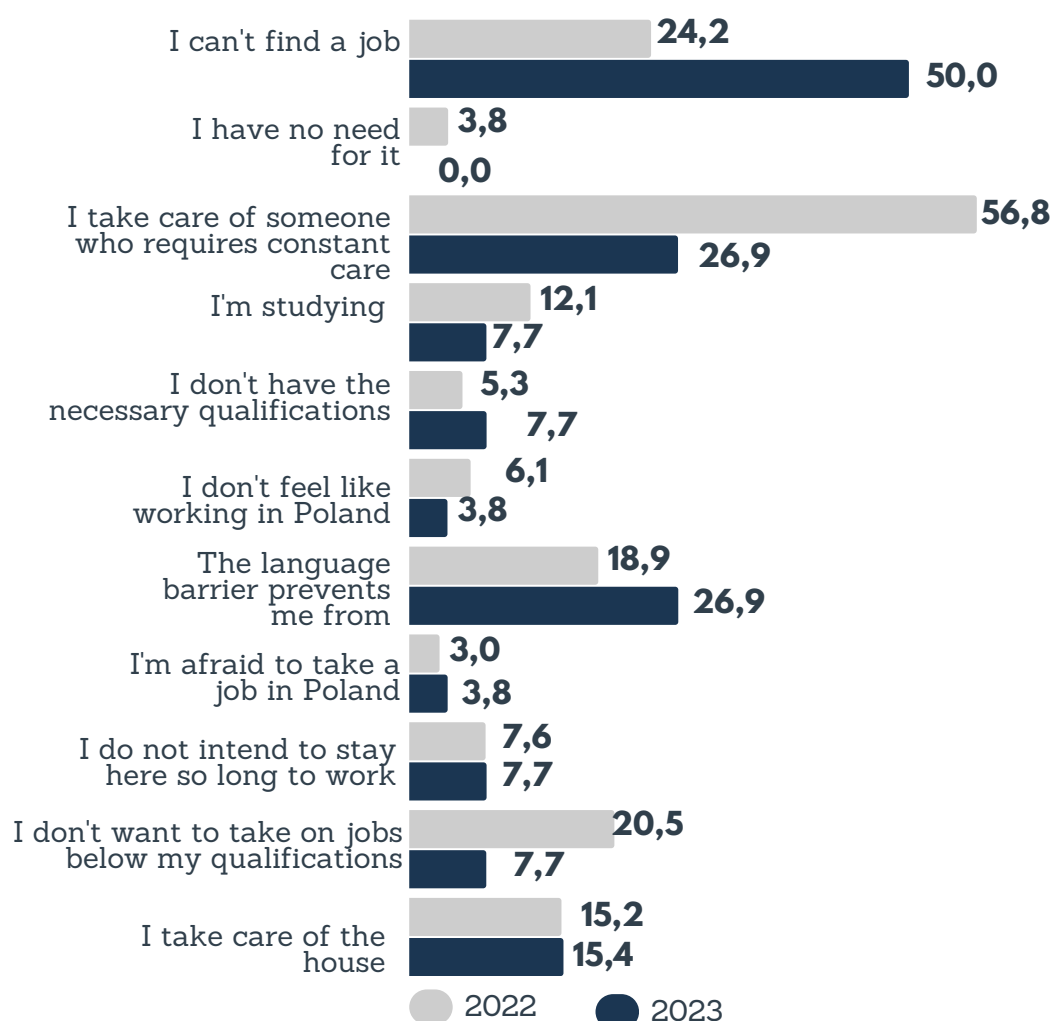
Respondents who were not working at the time of the survey were asked about their reasons for not working. Among pre-war migrants, the main reasons for not working were taking care of someone in the family (47%) and taking care of the home (38%). Just over 20% of respondents said they were unable to find a job. In the second edition of the survey, nearly 30% indicated that a language barrier prevented them from finding a job. This is a rather surprising result that requires additional analysis. It would be necessary to clarify whether insufficient knowledge of the Polish language makes it impossible to find any job, or whether it is a question of employment requiring a more advanced knowledge of Polish (spoken and written) in the primary labour market. Significantly fewer, 24% of respondents were not working because they were taking care of someone.

## Why are you currently not working? (pre-war migrants)



The refugee group is also seeing changes when it comes to reasons preventing them from working. In 2022, the most frequently cited factor was the need to care for someone. More than 24% of respondents were unable to find a job, for nearly 19% the barrier was the lack of knowledge of the Polish language, and 20% did not want to work below their qualifications. In the 2023 edition of the survey, half of the non-working respondents said they were unable to find employment. Nearly 26% pointed to the language barrier (and this is an increase compared to the previous edition of the survey). Fewer, just under 27%, said that getting a job prevented them from caring for someone. It is also noteworthy that among refugees, the percentage of responses regarding unwillingness to take an under-qualified job as a factor for inactivity decreased.

### Why are you not currently working? (refugees)





# JOB PROSPECTS AND RESIDENCE

Nearly half of pre-war migrants asked in 2022 about their prospects for continued work in Poland declared that they wanted to continue their employment. In the 2023 survey, the share of these responses rose to more than 57%. However, the share of those declaring they would stay in Poland permanently declined from over 31% in 2022 to 22% in 2023. There was a slight increase in the share of respondents who intend to return to Ukraine (from 6.6% in 2022 to 8.2% in 2023), as well as those who would like to leave for another country.

According to the 2022 survey, more than 40% of refugees would like to return to Ukraine if possible. Some 38% planned to stay in Poland permanently, while nearly 17% did not yet know which country they would live in permanently. Only 2.6% intended to go to another country, and 1.8% intended to change their place of residence in Poland. Some changes can be seen in the attitudes of respondents in 2023. More than 47% of respondents would like to return to Ukraine. Slightly less compared to the 2022 results, only 30% declared they would stay in Poland permanently. More than 18% of respondents did not yet know with which country they would tie their future.



8,2  
pp.

*The percentage of people saying they will continue employment in 2023, compared to 2022, increased by 8.2 percentage points.*

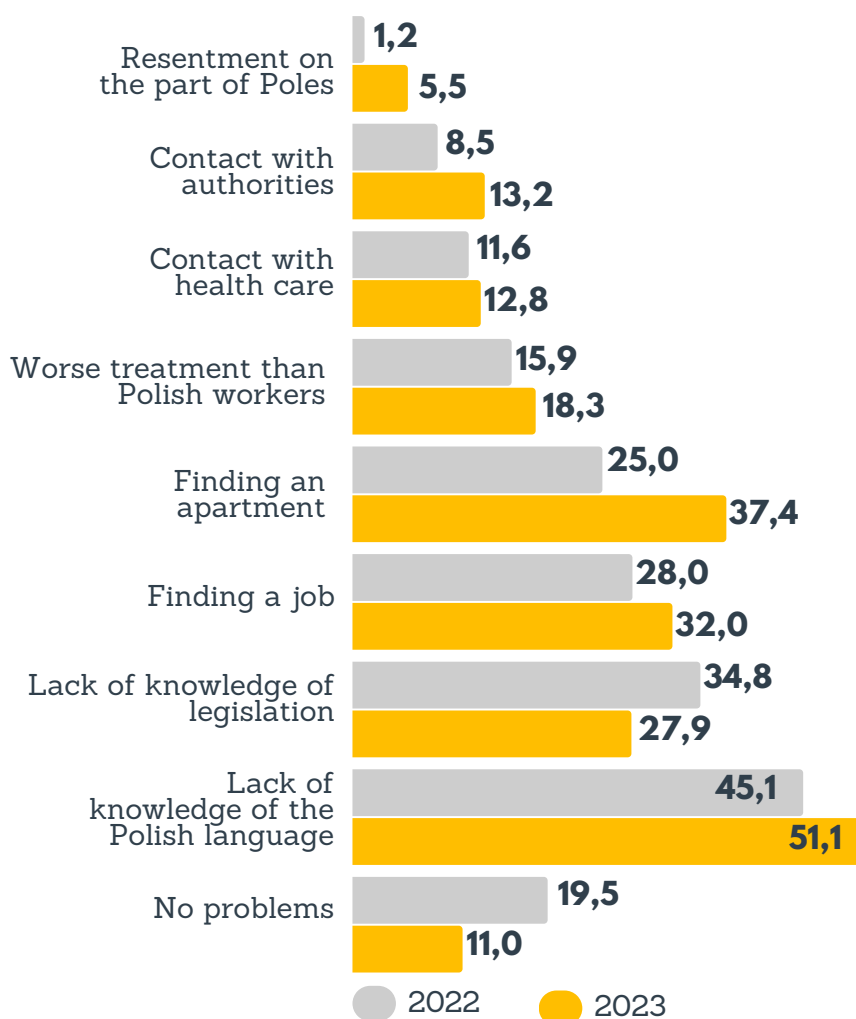
# THE BIGGEST PROBLEM UPON ARRIVAL

Respondents were also asked about their biggest problems upon arrival.

Among pre-war migrants in the first edition of the survey, i.e. 2022, the most frequently cited problems were lack of knowledge of the Polish language (45.1%), lack of knowledge of laws (34.8%) and finding a job (28%). About ¼ of respondents cited difficulties finding housing.

Quite surprisingly, in the 2023 survey, more than half of the pre-war migrants cited lack of Polish language skills as a problem. This may indicate that their knowledge of Polish is not sufficient, for example, to make the transition from secondary to primary employment. It is also worth noting that for more than 37% of respondents (more than a year ago), finding housing was a problem.

## What was the biggest problem after arriving in Poland? (Pre-war migrants)

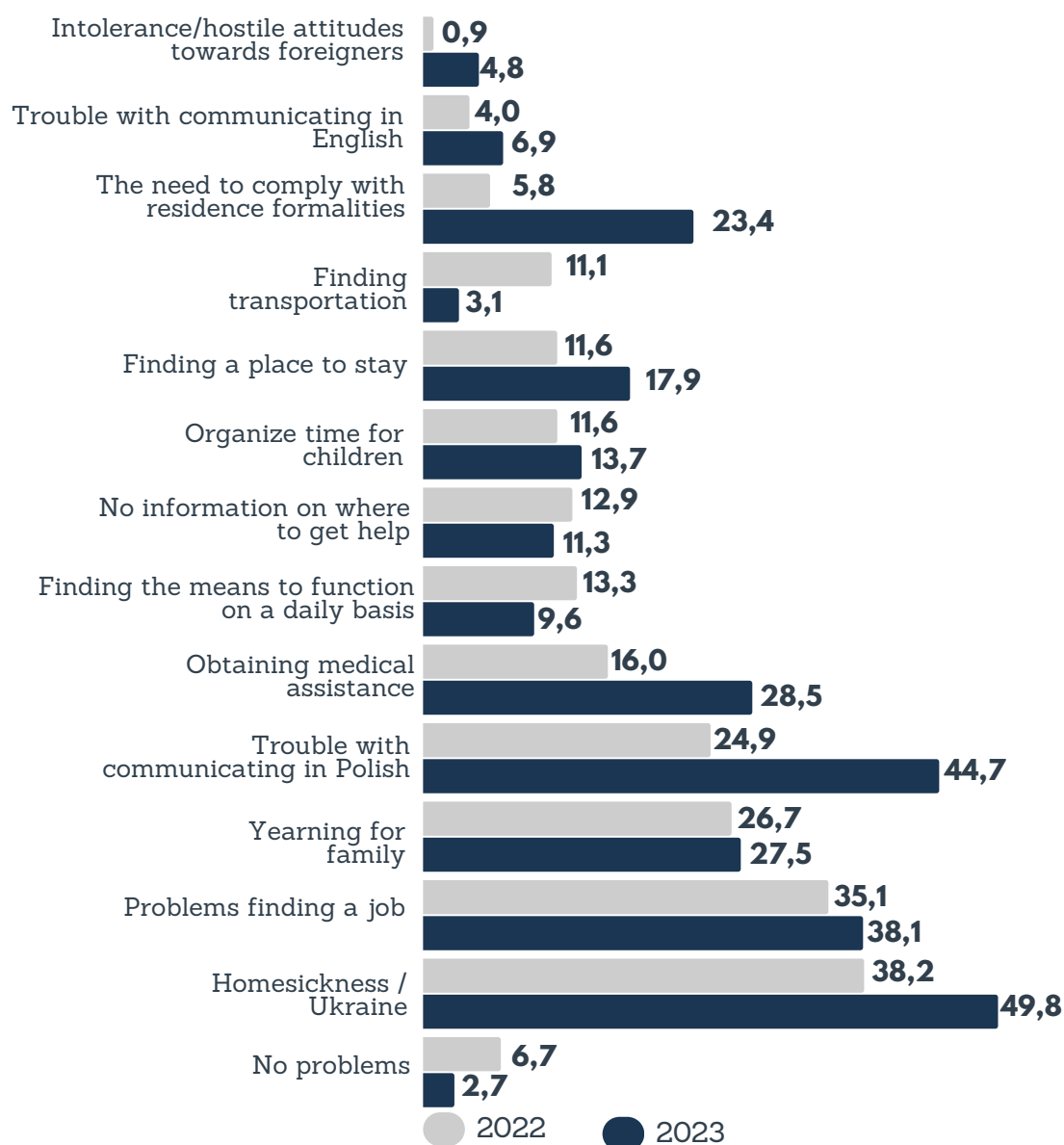


And - for about 1/3 - finding a job (this is also a slight increase from the first edition of the survey).

Just over 22% said they were unable to find a job. The share of those saying they were not qualified to take a job rose to nearly 17%, and about 10% of those surveyed did not want to take a job below their qualifications.

Refugees in the 2022 survey primarily pointed to homesickness/Ukraine (38.2%), homesickness for family (26.1%), the problem of finding a job (35.1%) and trouble communicating in Polish (24.9%). In 2023, on the other hand, homesickness was the biggest difficulty for nearly half of the respondents in connection with their stay in Poland. Noteworthy, nearly 45% of respondents (that is, more than in 2022) mentioned problems with communicating in Polish. This is an interesting finding, as among refugees the share of responses indicating an improvement in Polish language skills between the 2022 and 2023 surveys was significant. This may indicate that even though the level of Polish language proficiency is higher among refugees than it was at the beginning of their stay in Poland, it is still, in their opinion, insufficient - for example, to move freely in the labor market or to apply for employment more in line with their qualifications.

### What was the biggest problem after arriving in Poland? (refugees)



# REVENUE AND EXPENDITURE

Pre-war migrants and refugees are increasingly attractive consumers. In the 2023 edition of the survey, they were asked about their average monthly income and spending.

## PRE-WAR MIGRANTS

**4 289  
Zł**

**Average monthly expenses  
household**

(N=256)

**3 755  
Zł**

**Average monthly income of the  
respondent (net)**

(N=247)

## REFUGEES

**3 841  
Zł**

**Average monthly expenses  
household**

(N=288)

**2 898  
Zł**

**Average monthly income of the  
respondent (net)**

(N=275)

# HOUSING EXPENSES

Housing expenses were defined as housing and utility payments (e.g., water, electricity, gas).

## HOUSING - PRE-WAR MIGRANTS

95%

migrants have housing-  
related expenses

2 321  
Zł

Spends on average per  
month on housing



## HOUSING - REFUGEES

85%

migrants have housing-  
related expenses

2 236  
Zł

Spends on average per  
month on housing

*Values calculated based on the average amount of respondents' spending on housing.*



# FOOD EXPENSES

## FOOD - PRE-WAR MIGRANTS

99%

migrants have food  
expenses

1 147  
Zł

Spends on average per  
month on food

*Values calculated based on the  
average amount of respondents'  
spending on food.*



## FOOD - REFUGEES

99%

migrants have food  
expenses

1 110  
Zł

Spends on average per  
month on food

# WYDATKI NA UBRANIAA

## CLOTHING - PRE-WAR MIGRANTS

84%

migrants have clothing  
expenses

332  
Zł

migranci mają wydatki  
na odzież

*Values calculated based on the  
average amount of respondents'  
spending on clothing.*



## CLOTHING - REFUGEES

80%

migrants have clothing  
expenses

329  
Zł

migranci mają wydatki  
na odzież

# HEALTH CARE SPENDING

## HEALTHCARE

- PRE-WAR MIGRANTS



Migrants have health care expenses



Spends on average per month on health care



## HEALTHCARE

- REFUGEES



Migrants have health care expenses



Spends on average per month on health care

*Values calculated based on the average amount of respondents' spending on health care.*

# TRANSPORTATION EXPENSES

## TRANSPORT - PRE-WAR MIGRANTS

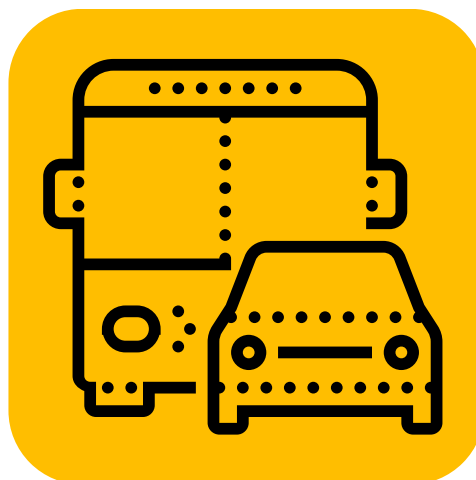
80%

Migrants have transportation expenses

216  
Zł

Spends on average per month on transportation

*Values calculated based on the average amount of respondents' spending on transportation.*



## TRANSPORT - REFUGEES

72%

Migrants have transportation expenses

188  
Zł

Spends on average per month on transportation

# SPENDING ON EDUCATION

## EDUCATION - PRE-WAR MIGRANTS

**26%**

migrants have  
education spending

**455  
Zł**

Spends on average per  
month on education



## EDUCATION - REFUGEES

**34%**

migrants have  
education spending

**327  
Zł**

Spends on average per  
month on education

*Values calculated based on the  
average amount of respondents'  
spending on education.*



# SPENDING ON CULTURE AND RECREATION

## CULTURE LEISURE - PRE-WAR MIGRANTS

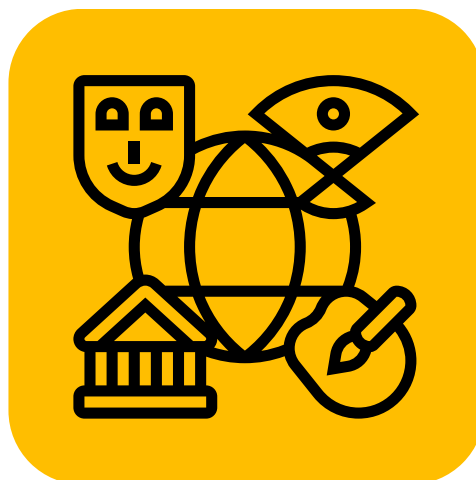
62%

migrants has  
expenditures on culture  
and recreation

180  
Zł

spends on average per  
month on culture  
and recreation

*Values calculated based on the  
average amount of respondents'  
spending on culture and recreation.*



## CULTURE LEISURE - REFUGEES

51%

migrants has  
expenditures on culture  
and recreation

175  
Zł

spends on average per  
month on culture  
and recreation

# EXPENSES FOR MEALS IN RESTAURANTS AND BARS

## MEALS IN BARS AND RESTAURANTS - PRE-WAR MIGRANTS

**53%**

migrants have spending  
on meals  
In bars and restaurants

**200  
Zł**

spends on average per  
month on meals  
In bars and restaurants

*Values calculated based on the  
average amount of respondents'  
spending on meals and restaurants.*



## MEALS IN BARS AND RESTAURANTS - REFUGEES

**35%**

migrants have spending  
on meals  
In bars and restaurants

**169  
Zł**

spends on average per  
month on meals  
In bars and restaurants

# EXPENSES FOR BEAUTY SERVICES AND HAIRDRESSING

## COSMETIC SERVICES AND HAIRDRESSING

- PRE-WAR MIGRANTS

**59%**

Migrants have expenses for beauty and hairdressing services

**171  
Zł**

spends on average per month on beauty and hairdressing services



## COSMETIC SERVICES AND HAIRDRESSING

- REFUGEES

**44%**

Migrants have expenses for beauty and hairdressing services

**163  
Zł**

spends on average per month on beauty and hairdressing services

*Values calculated based on the average amount of respondents' spending on hair and beauty services.*

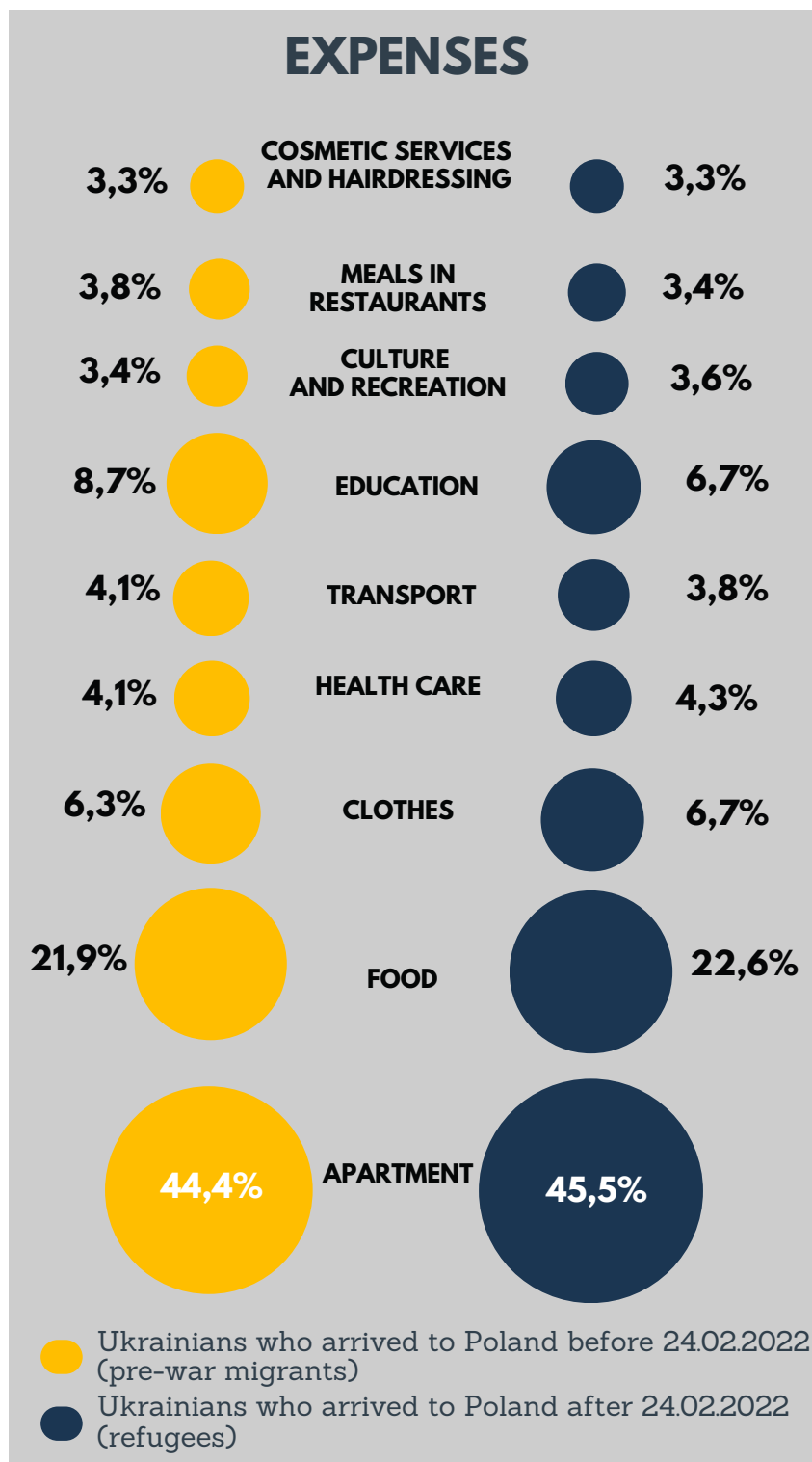
# EXPENSE STRUCTURE

The spending structure of pre-war migrants and refugees is very similar. The largest part of expenses is covered by housing (rental fees and utilities). Housing fees account for almost half of monthly expenses.

The second-biggest expense, accounting for more than 20% of total spending, is food. refugees spend less than a pp more on it in their monthly budget.

The next expenses account for a much smaller percentage on a monthly basis.

The biggest differences can be seen in spending on education. Pre-war migrants spend 8.7% of their monthly expenditures on education, while refugees allocate 2 pp less for the same purpose,

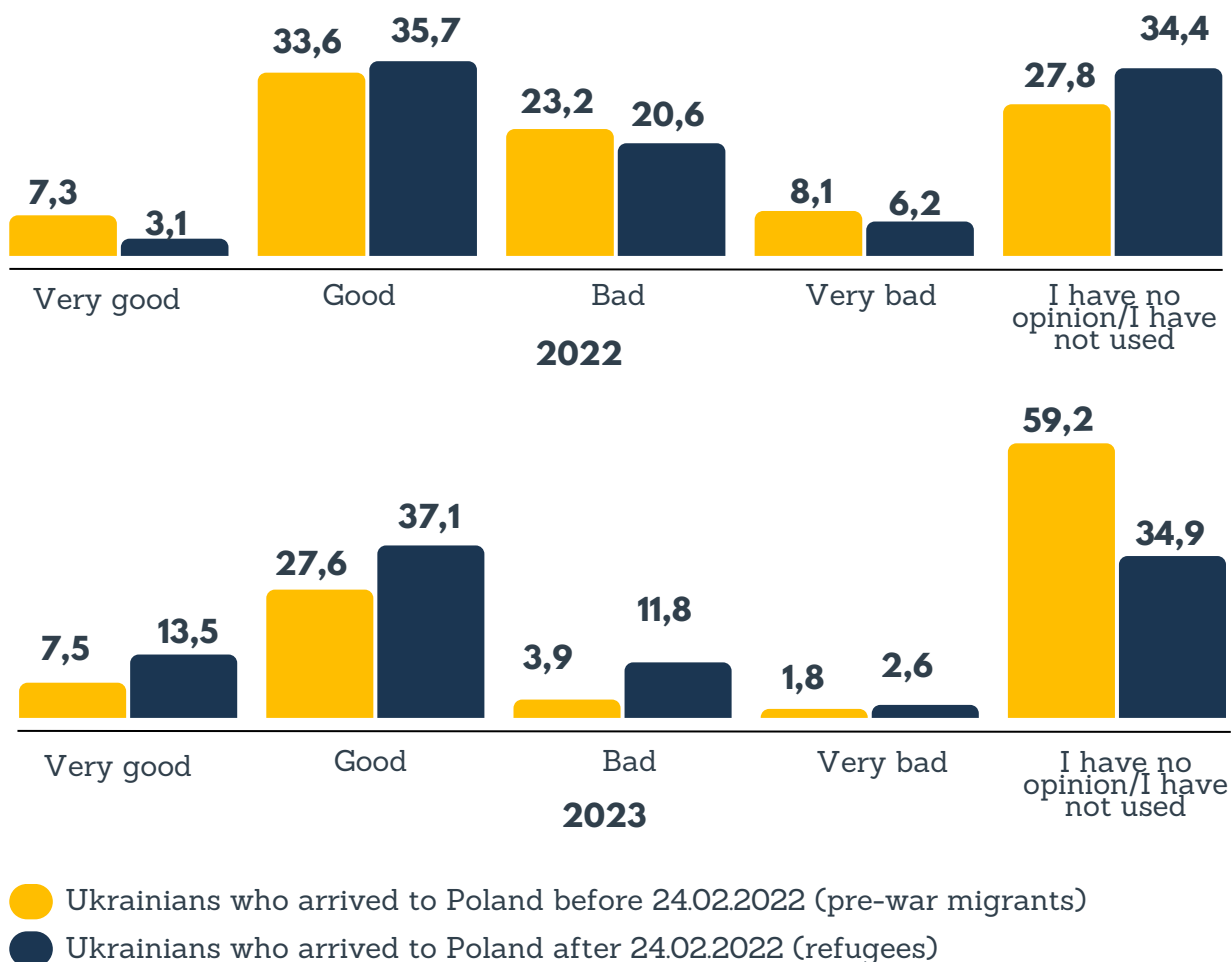


# ASSESSMENT OF ACCESS TO HEALTH CARE

In 2022, more than 33% of pre-war migrants and more than 35% of refugees rated access to health care well. About a third of the first group and ¼ of the second rated it poorly or very poorly.

In 2023, nearly 60% of pre-war migrants and 34% of refugees said they had no opinion on access to health care. The percentage of respondents rating access to Polish health care well declined to 27%, but the group of those rating it badly or very badly also declined. Among refugees, the share of those who rated access to health care good and very good increased slightly, while the share of non-positive responses decreased.

## How would you rate access to Polish health care services?

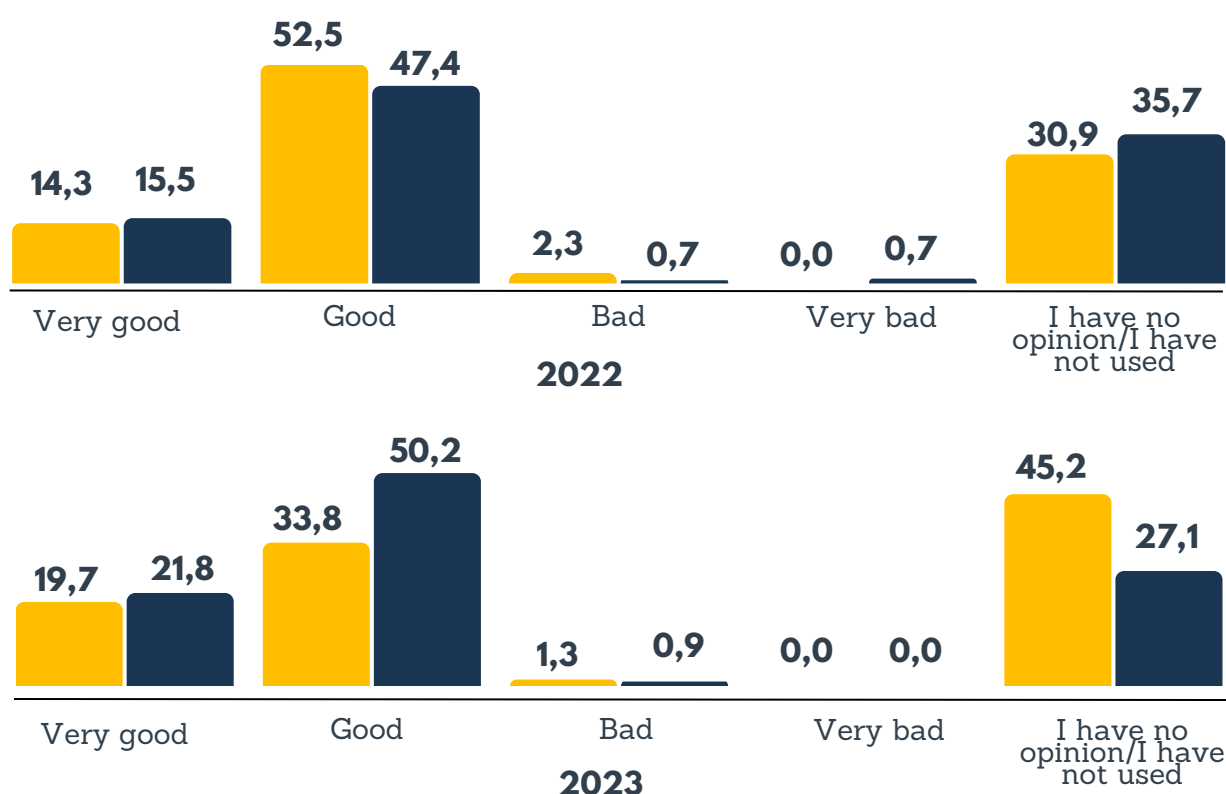


# ASSESSMENT OF ACCESS TO EDUCATION

Slight changes can also be seen in the assessment of access to education. In 2022, 52.5% of pre-war migrants and 47.4% of refugees rated it well, while 14.3% and 15.5% of respondents rated it very well, respectively. About 30% of pre-war migrants and 35% of refugees had no opinion on the subject.

In 2023, more than 45% of pre-war migrants and 27% of refugees had no opinion on the Polish education system. More than 70% of refugees rated it good or very good. In comparison, slightly fewer pre-war migrants had this opinion, at just over 53%.

## How would you rate access to Polish education?

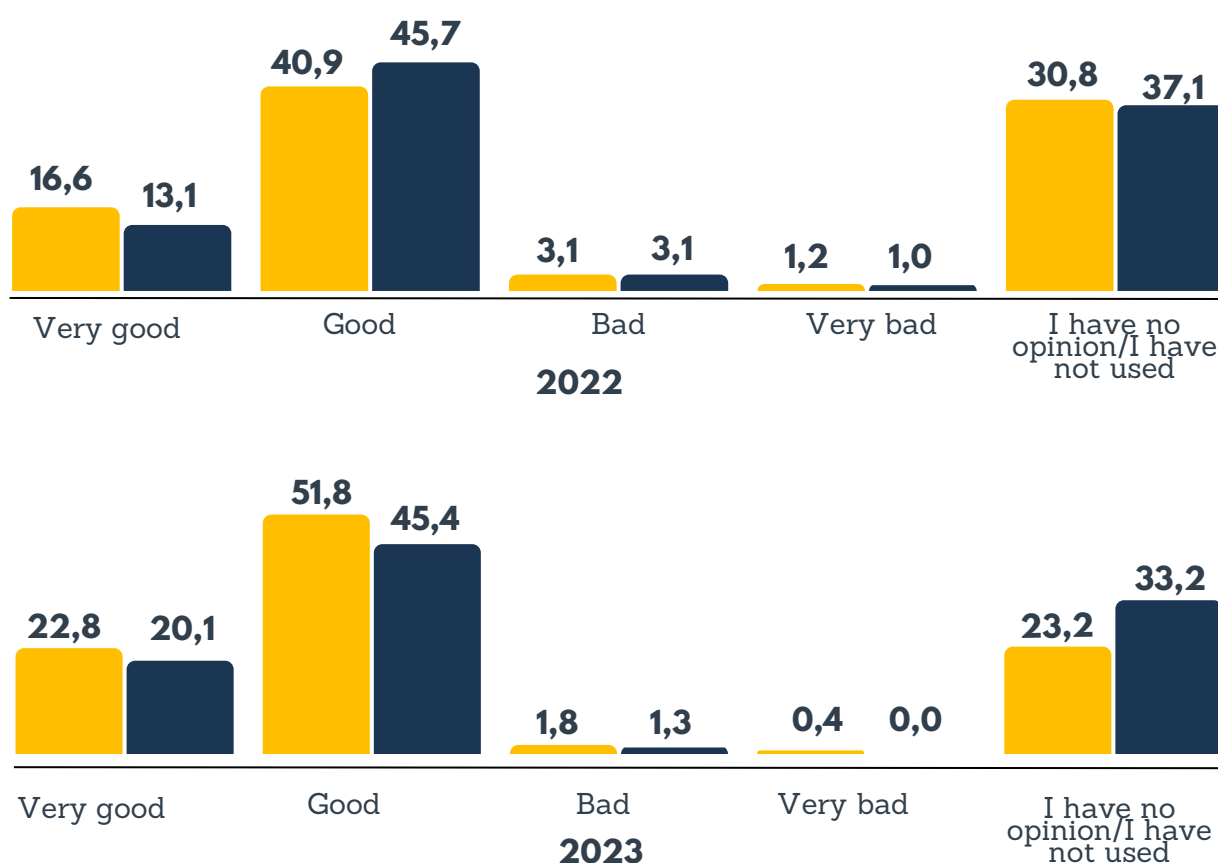




# ASSESSMENT OF ACCESS TO SOCIAL SUPPORT

Nearly 60% of refugees and more than 57% of pre-war migrants rated access to social support as good or very good in 2022. By 2023, on the other hand, the share of positive responses rose to 74% among pre-war migrants and to 65.5% among refugees.

**How would you rate access to Polish social support?**

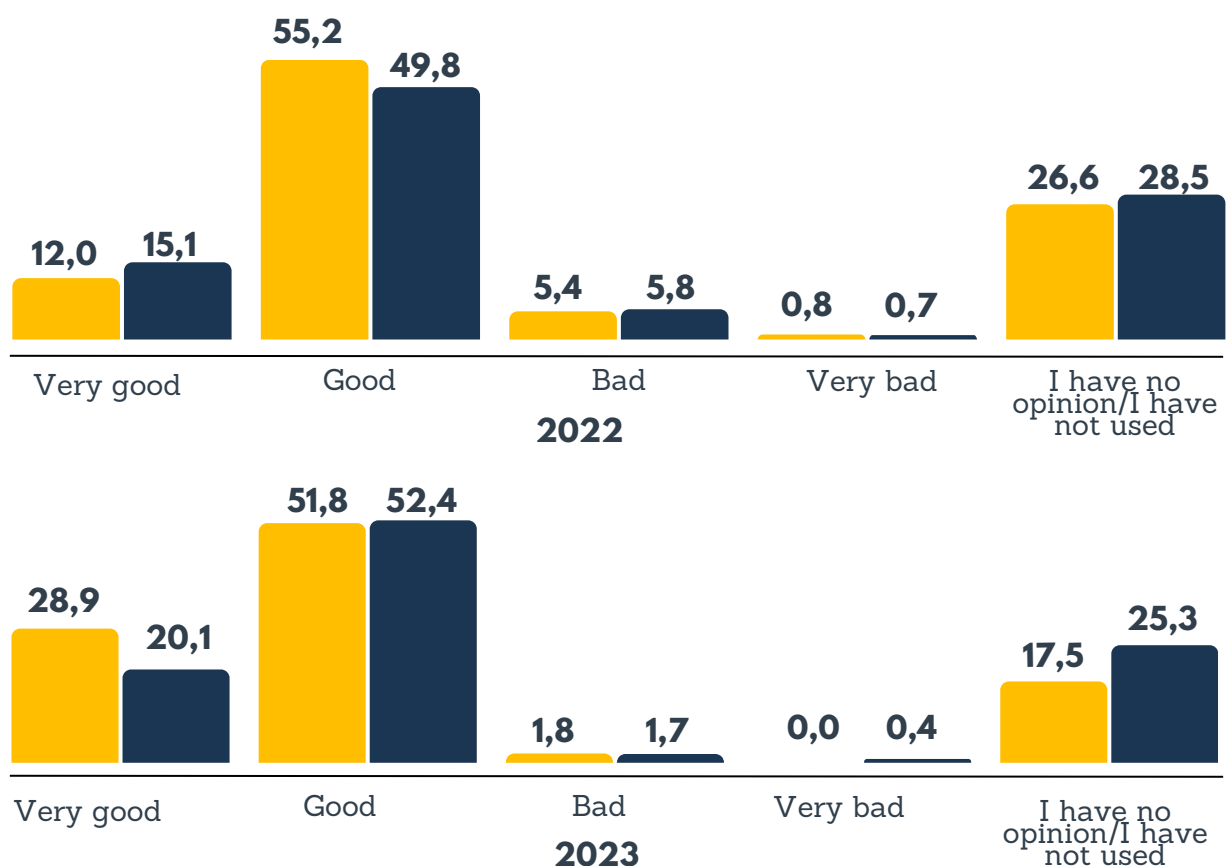


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# ASSESSMENT OF ACCESS TO LEGAL INFORMATION

Ukrainian citizens rate access to legal information as good or very good. In 2022, the share of positive responses was just over 67% among pre-war migrants, and nearly 65% among refugees. In 2023, on the other hand, more than 80% of respondents who arrived before the war and 72.5% of refugees expressed positive opinions. In 2023, the share of those with no opinion on the subject decreased.

**How would you rate your access to information about your rights during your stay in Poland?**

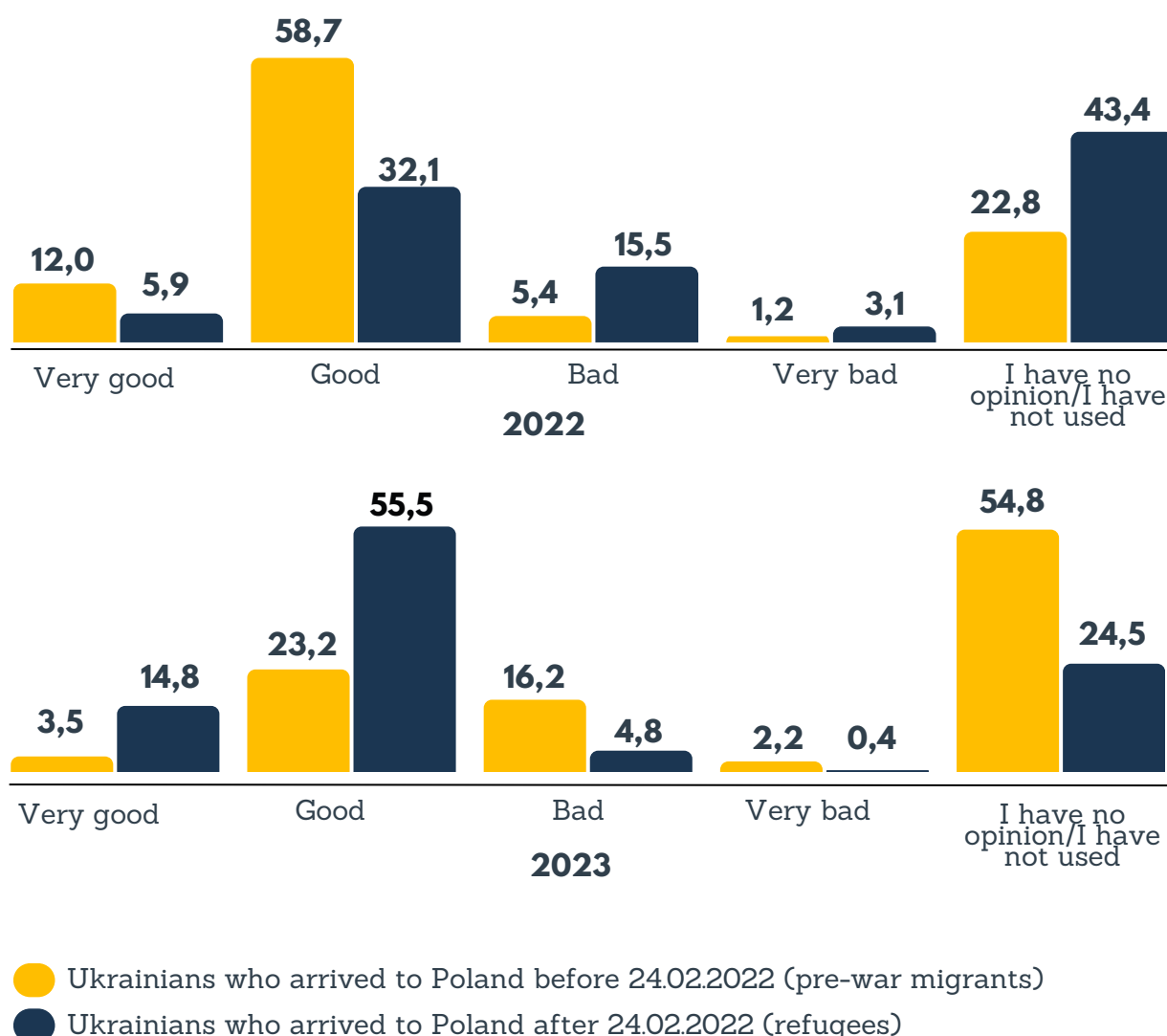


- Ukrainians who arrived to Poland before 24.02.2022 (pre-war migrants)
- Ukrainians who arrived to Poland after 24.02.2022 (refugees)

# ASSESSMENT OF ACCESS TO EMPLOYMENT

It is worth noting that between the two editions of the survey the evaluation of access to employment changed. In 2022, more than 70% of pre-war migrants rated it well or very well. In 2023, it was only slightly more than 26% of respondents, and nearly 55% had no opinion on the subject (in comparison, in 2022, fewer, nearly 23% of respondents, had no opinion). The number of those who rate access to the labor market badly increased to more than 16% from 5.4%. In contrast, the share of positive opinions increased to 70% among refugees. In this group, the share of non-positive responses fell from more than 18% to about 5%.

## How would you rate access to employment?



# SUMMARY

Comparing the two editions of the survey, there are three main differences:

1

## SOCIAL NETWORKS

*The May 2023 survey shows a fairly significant change in terms of having social networks in Poland. The share of respondents who said they have no relatives in Poland has decreased, while a larger group declares having close family in Poland. In the case of refugees, this is an increase from 17.5% to nearly 37%.*

2

## LANGUAGE

*Improving Polish language skills among refugees. In the 2022 survey, more than 20% of respondents said they did not speak Polish. In 2023, by contrast, only 6.2% of respondents declared so. The share of those who know Polish at the B1 level (from 5.7% to 23.4%), i.e. at an intermediate level for basic communication, has increased significantly.*

3

## LABOUR MARKET

*More and more refugees are working. The respondents' declarations show that in 2023 more than 50% of respondents were employed (in 2022 it was 30% of respondents). More than half of the respondents said they found work on their own.*

# LEARN MORE ABOUT IMPLEMENTING SURVEYS AMONG THE UKRAINIAN COMMUNITY

Contact us and conduct a  
survey on the  
Manulo Research Panel



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