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ESTONIA

Surveys with Refugees from Ukraine: Needs, Intentions, and Integration Challenges

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Country Report & Data Analysis

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Cover photo: IOM' DTM enumerator speaking with refugees from Ukraine in Tallinn, Estonia. © IOM 2023

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KEY FINDINGS

- Top oblasts of origin: Kyiv City (13%), Khersonska (12%), Kharkivska (11%), Donetska (10%), Zaporizka (8%), Dnipropetrovska (8%).

- Intentions to move: no intention to move (88%), move to place of origin in Ukraine (3%), to another country (1%), where top two countries were Finland and Spain.

- Employment status: employed (36%), unemployed and looking for a job (33%), unemployed and not looking for a job (5%), retired (11%).

- Top needs upon return:* employment (27%), health services (26%), financial support (25%), documentation and registration (15%).

- Top areas of assistance received:* free transportation (86%), food products (70%), financial support (54%), long-term accommodation (33%).

- Top inclusion challenges:* employment (25%), language (24%), housing (17%), recognition of professional skills, diplomas (9%), financial issues (8%).

more than one answer possible

Map 1: Estonia, border crossing points, surveys deployed & locations
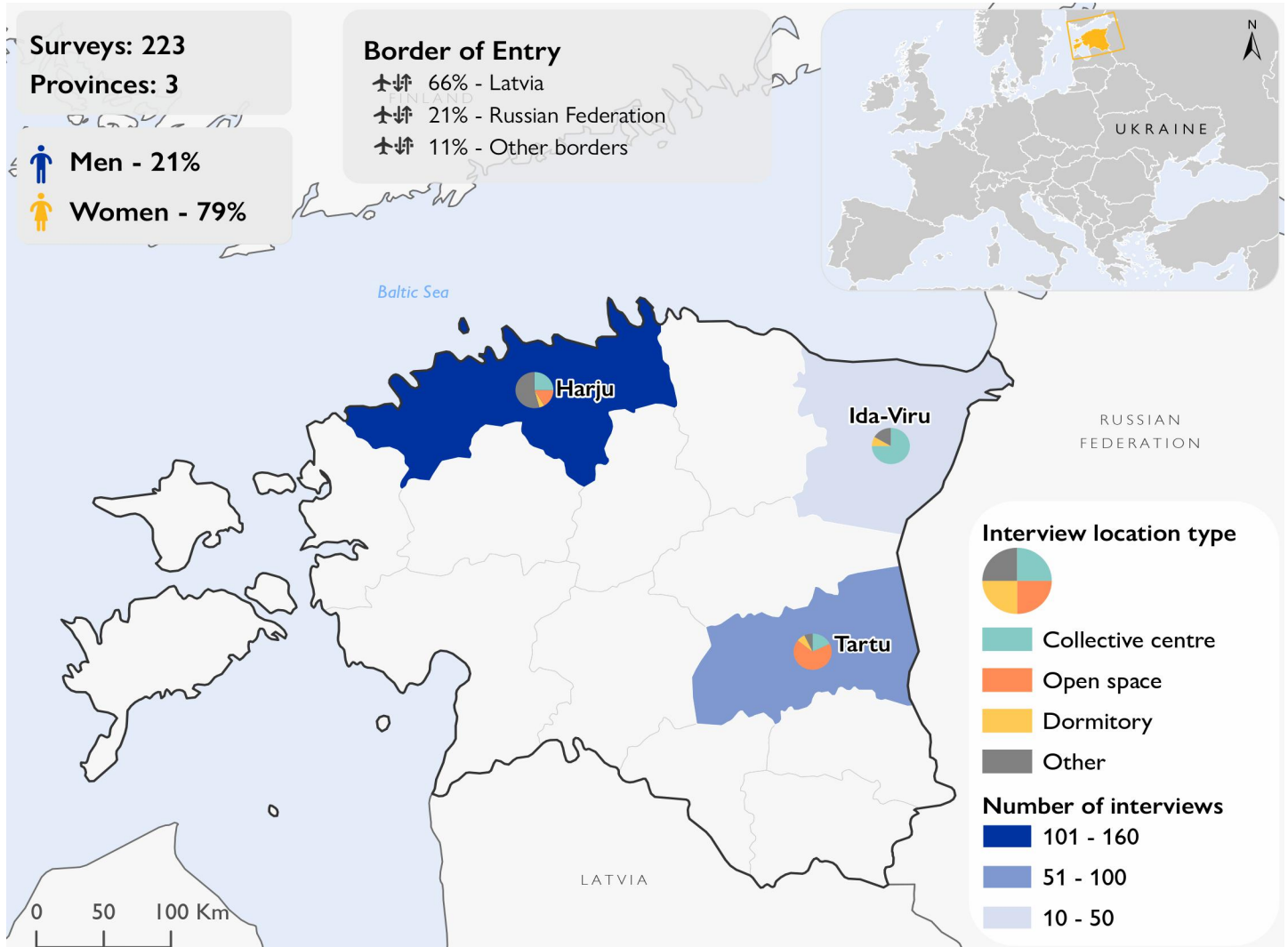
Surveys: 223
Provinces: 3

Men - 21%

Women - 79%

Border of Entry
66% - Latvia
21% - Russian Federation
11% - Other borders

Interview location type
- Collective centre
- Open space
- Dormitory
- Other

Number of interviews
- 101 - 160
- 51 - 100
- 10 - 50

This map is for illustration purposes only. The boundaries and names shown, and the designations used on this map do not imply official endorsement or acceptance by IOM.

1. Socio-Demographic Profile

Oblast (region) of origin

The majority came from the eastern and southern parts of the country, with the highest share of respondents coming from the city of Kyiv (13%), Khersonska (12%), Kharkivska (11%), Donetska (10%), Zaporizka and Dnipropetrovska (8% each).

The remaining respondents (38%) were living in other 15 regions throughout Ukraine. These included Luhanska (6%), Kiyvska (5%), Mykolaivska (4%), Vinnytska, Zhytomyrska, Odeska, Cherkaska (3% each), Poltavska, Rivnenska, Sumska, Chernihivska (2% each), Zakarpatska, Ivano-Frankivska, Khmelnytska (1% each).

Map 2: Oblast of origin before leaving Ukraine (%)
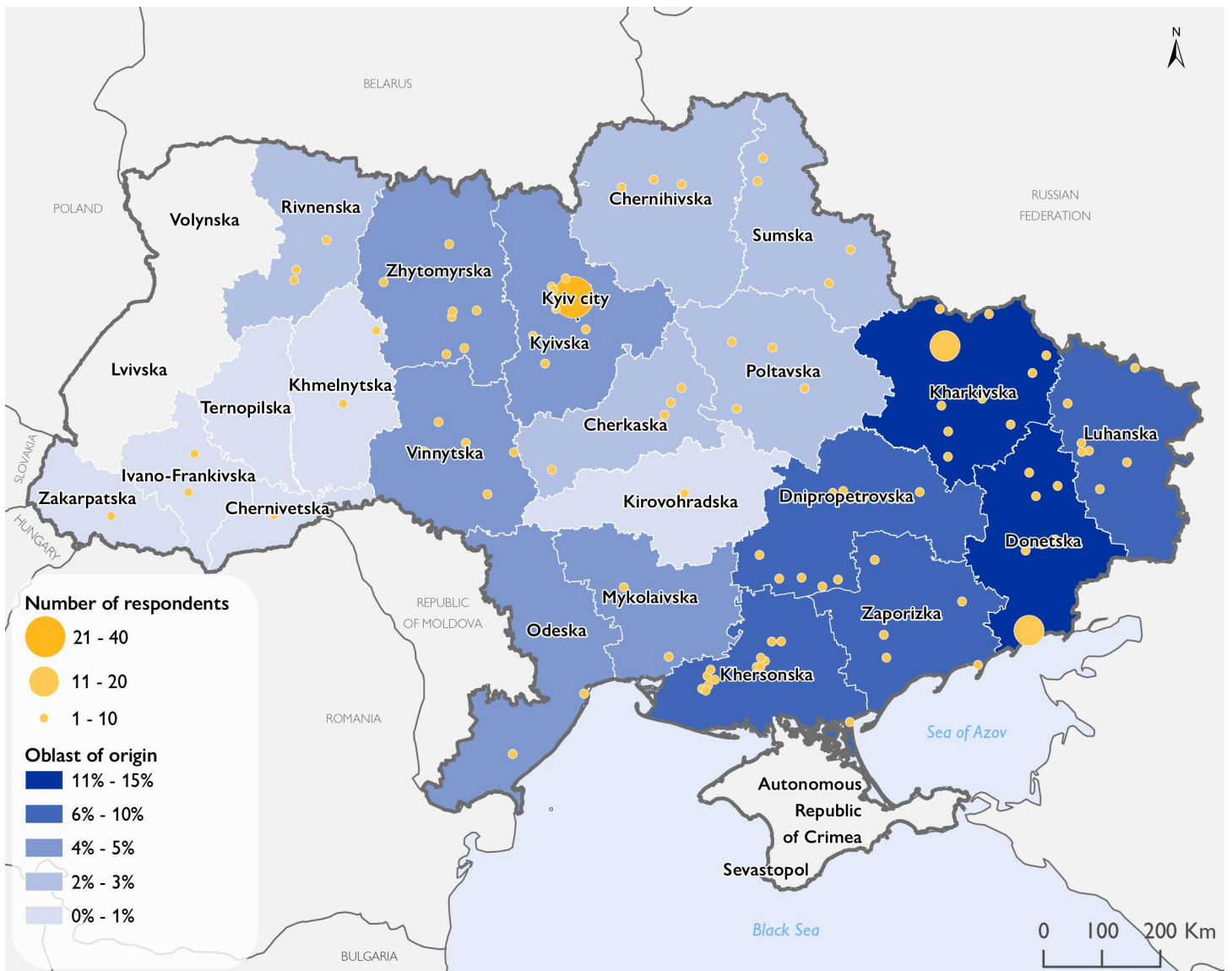
This map is for illustration purposes only. The boundaries and names shown, and the designations used on this map do not imply official endorsement or acceptance by IOM.

Gender and age

Seventy-nine per cent of the respondents were women, while men were 21 per cent. Over one third of interviewees were between 30 and 39 years of age (33%), followed by those between 40 and 49 (21%), and between 18 and 29 (19%).

When looking at data disaggregated by gender, the average age for men (43) in the sample was slightly higher than the women's (41). The largest age group for women was of those between 30 and 39 years old (36%), followed by those aged between 40 and 49 (21%). Among men, the largest groups were aged between 30 and 39 years (23%) and between 40 and 49 (23%).

Figure 1: Age, by gender and total (%)
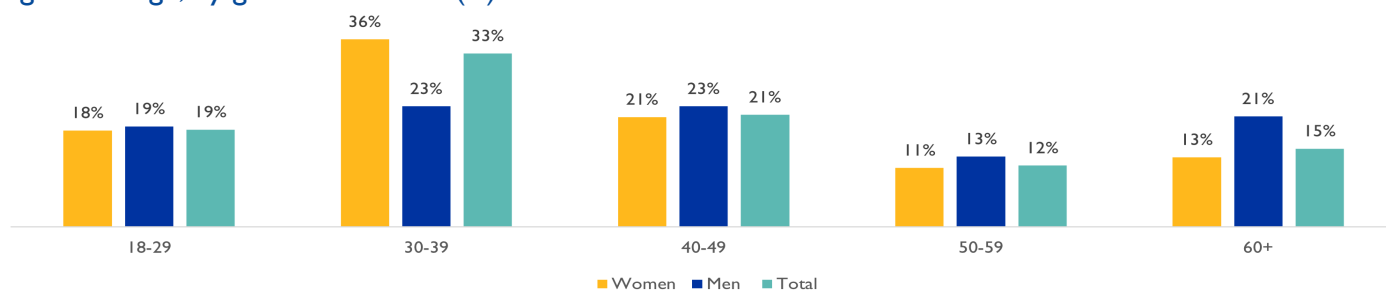
Marital status

A total of 53 per cent of the respondents were married, while another 20 per cent were single. Twenty-one per cent were divorced and, in a partnership, (11% and 10% respectively), the remaining 6 per cent were widowed.

The share of married persons was slightly higher among men than among women (58% versus 52%). In addition, none of the men reported being widowed, in comparison to 8 per cent of women in the sample.

Figure 2: Marital status, by gender and total (%)
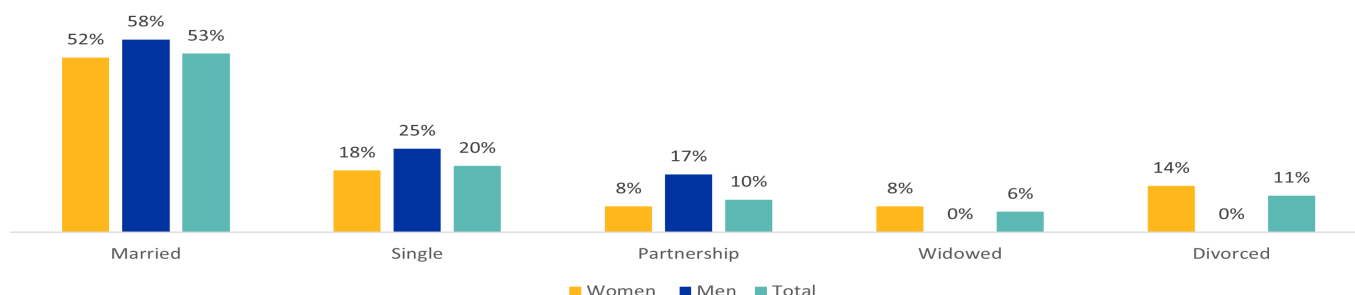
Documents possessed at the time of interview

The majority of the respondents travelled with more than one document. That being said, most respondents (94%) travelled with their ID card, 77 per cent were in possession of their biometric passports, 47 per cent had education certificates.

Another 31 per cent travelled with their birth certificate, 29 per cent had a driver license and the remaining 19 per cent declared to have a permanent residence permit (11%) and a non-biometric passport (8%).

Figure 3: Documents in possession of respondents at the time of interview (%)
(more than one answer possible)
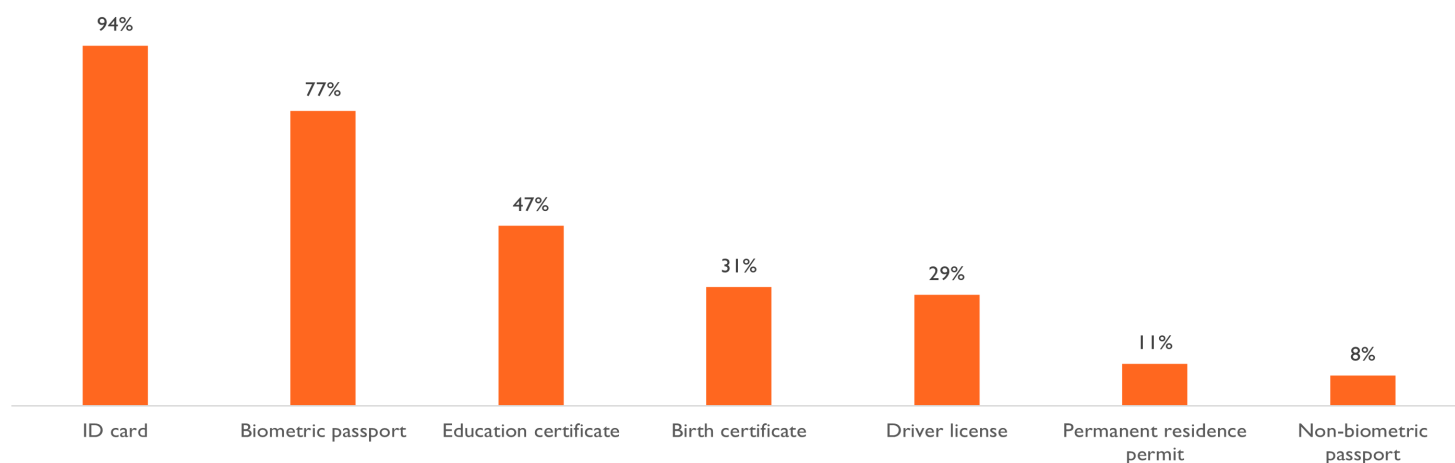
Average time spent outside Ukraine since initial displacement

The approximate duration of displacement can be assessed looking at the difference between respondents' initial date of displacement from Ukraine, and the date of interview. Most respondents were initially displaced in the first half of 2022, when the war started. For example, 34 per cent of respondents were initially displaced in March 2022.

This means that by the time the interview was conducted (March 2023), they had spent about one year in displacement. Another 10 per cent of respondents were

displaced in April 2022, giving them 11 months since their initial displacement and the date of assessment. Between May and December 2022, the rate of displacement varied between 1 to 6 per cent. This means that 29 per cent of respondents had spent 3-10 months in displacement at the time of assessment.

Lastly, 13 per cent of respondents who were initially displaced in 2023 spent only a few months in the displacement.

Table 1: Approximate time spent in displacement until date of interview (%)

Date since initial displacement	Approximate time spent until date of interview, (months)	% Of respondents
Before 2022	2-8 years	6%
22-Jan	14 months	1%
22-Feb	13 months	6%
22-Mar	12 months	34%
22-Apr	11 months	10%
22-May	10 months	3%
22-Jun	9 months	6%
22-Jul	8 months	3%
22-Aug	7 months	5%
22-Sep	6 months	3%
22-Oct	5 months	2%
22-Nov	4 months	2%
22-Dec	3 months	5%
23-Jan	2 months	4%
23-Feb	1 month	5%
23-Mar	0 months	4%

2. Intentions

Intention to move elsewhere or stay in current location

Eighty-nine per cent of respondents interviewed declared their intention to remain in Estonia either in their current location (88%) or a different location in Estonia (1%). Three per cent planned to return to their place of origin in Ukraine, whereas one per cent intended to move to another country. The remaining respondents did not know (6%).

When looking at the data disaggregated by gender, women were slightly more likely to stay in their current location than men (89% versus 85%).
In addition, the probability of men relocating to a foreign country and moving to another place within Estonia was higher than that of women (2% versus 1% each).

Figure 4: Respondents' intention to move from current location, by gender and total (%)

Women ■ Men ■ Total
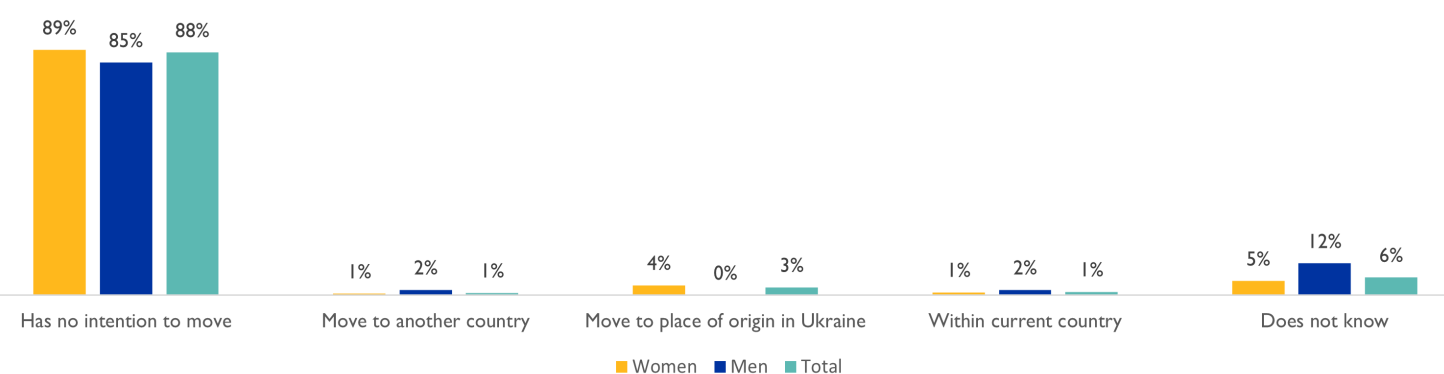
Intended length of stay in current location

Out of those intending to move within Estonia, Ukraine or elsewhere (N=13), thirty-one per cent intended to stay less than one month in their current location before moving. 15 per cent of respondents planned to stay between three to six months, another 15 per cent between one

to three months, 16 per cent between six months to one year and over one year (8% each). Lastly, 15 per cent of respondents intended to stay less than a week and another 8 per cent did not know for how long they were planning to stay in their current location before moving.

Figure 5: Intended length of stay in current location before moving elsewhere (%)
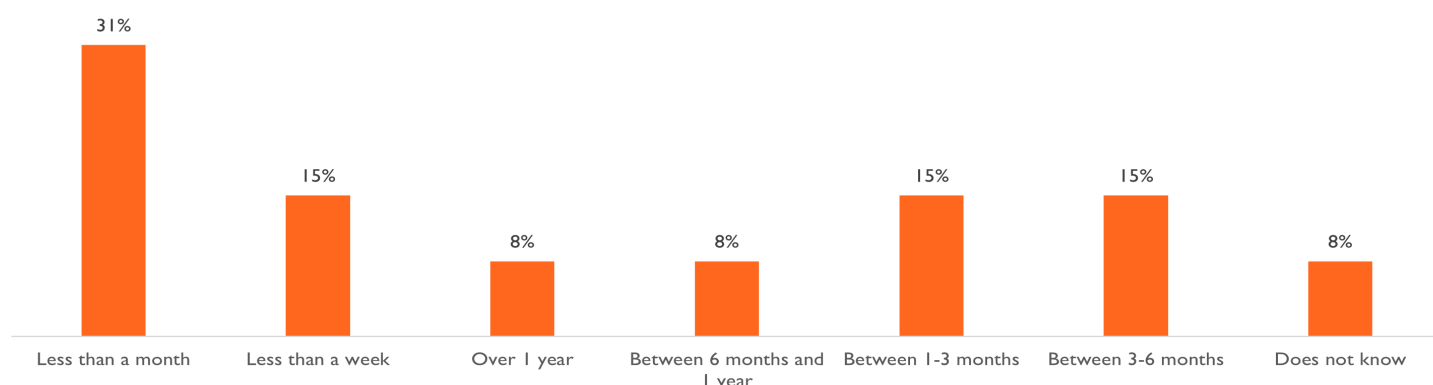
Intended oblast of destination in Ukraine and reasons to go back

Out of those set on returning to Ukraine (N=8), 88 per cent planned to go back to the same oblast of origin, while the remaining 12 per cent aimed to relocate to a different oblast, specifically Kharkivska.

Out of those intending to go back to Ukraine, either to the same oblast of origin (N=7), or to an alternative oblast (N=1), 38 per cent indicated that they selected Ukraine as their intended destination with the purpose of reuniting with their family.

An additional 25 per cent of respondents planned to return in order to assist their family members in reaching the border.

Meanwhile, 52 per cent of respondents had intentions to return to Ukraine for other various reasons: motivations included finding work in Ukraine, dealing with resource and employment-related difficulties, and wanting to support their family members (13% each).

Additionally, respondents expressed their intention to move back to ensure their family's safety or due to the improved situation in both Ukraine and their original place of residence (13% each).

The remaining 25 per cent of respondents indicated other reasons, such as divorce or visiting relatives.

Figure 6: Reasons for choosing Ukraine as intended destination, total (N=8), (%)
(more than one answer possible)

Reason	%
Reunite with family	38%
Help family members to get to the border	25%
Found work in Ukraine	13%
Lack of resources	13%
Lack of job	13%
Help family	13%
Bring family to safety	13%
Improved situation in Ukraine	13%
Improved situation in place of origin	13%
Other	25%
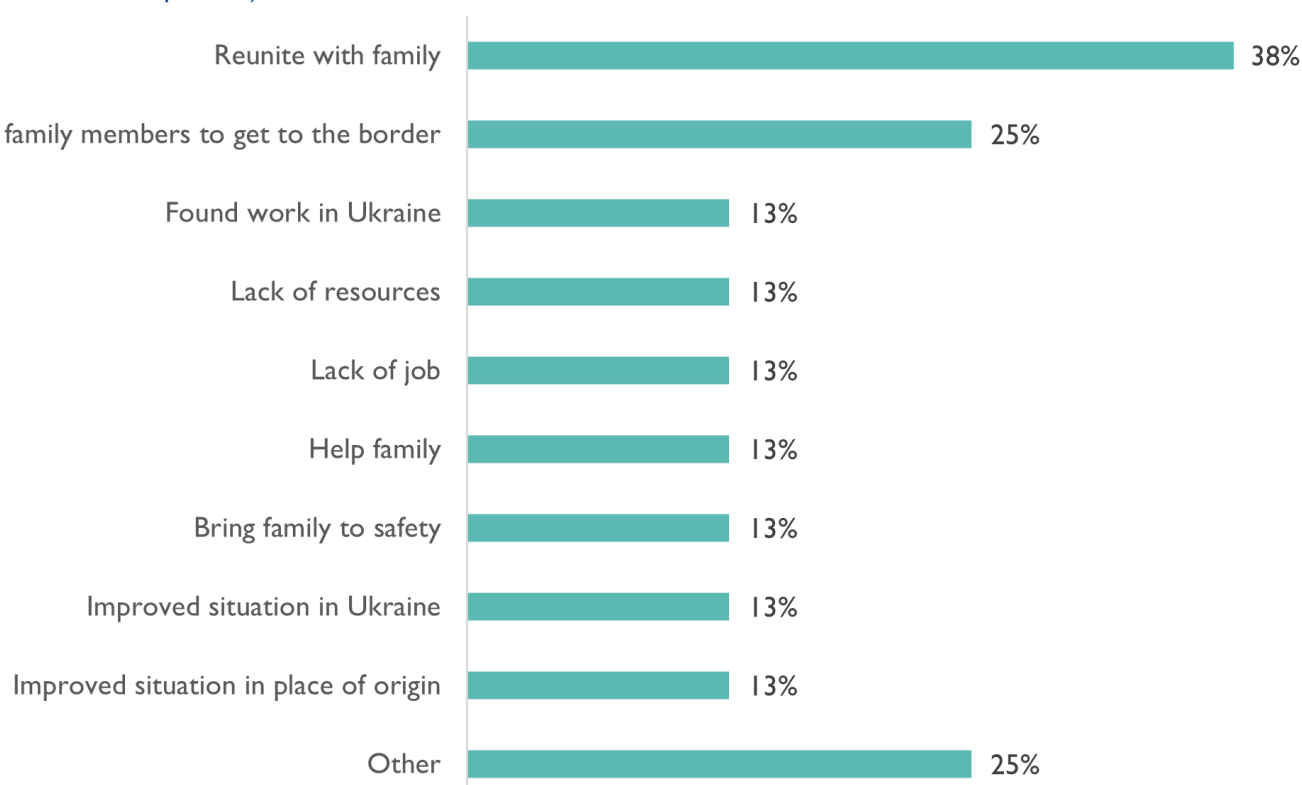
Immediate needs upon return

Out of those intending to go back (N=8), 75 per cent of respondents indicated that their top needs upon crossing back would be cash support, housing, transportation (25% each).

This was followed by job placement (13%) and information (13%). Another 13 percent of interviewees indicated uncertainty about their needs, while 63 per cent reported having no specific needs upon their return.

Figure 7: Main needs upon return (N=8), (%) (more than one answer possible)
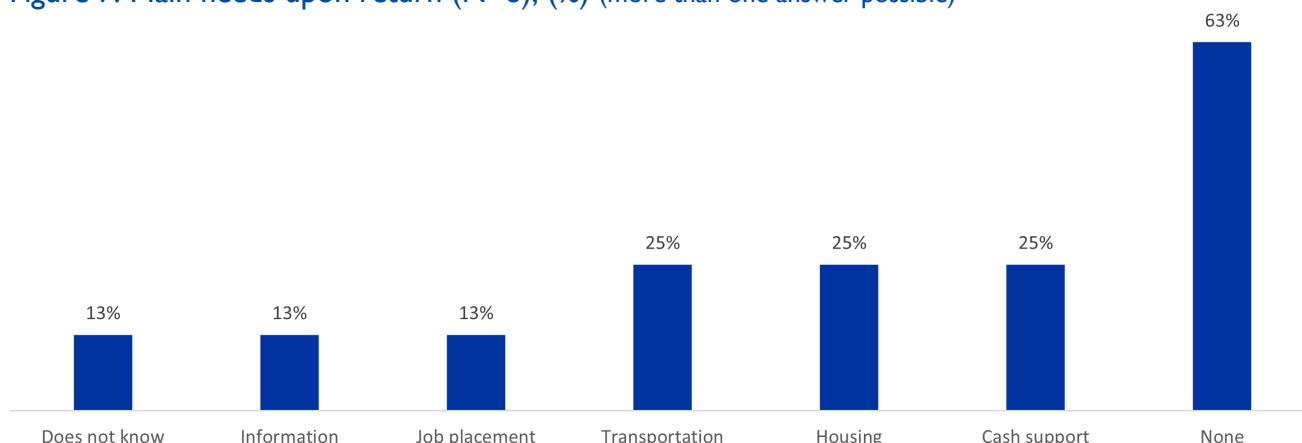
Figure 8: Intended country of destination (%) N=2
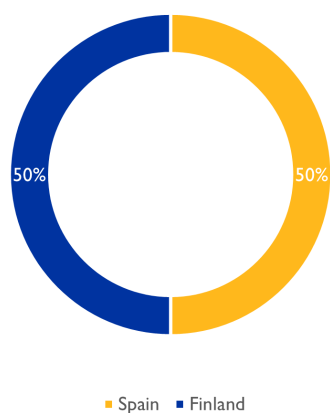
■ Spain ■ Finland

Intended country of destination

Among those individuals who expressed their intention to go to another country as their final destination (N=2), 50 per cent were planning to go to Finland, another 50 per cent to Spain. A female respondent intended to go to Finland, while a male respondent expressed his intention to go to Spain.

Reasons for selecting elsewhere in Estonia or other countries as destination

Among those who intended to relocate either within Estonia (N=3) or to another country (N=2), 80 per cent considered family or friends in the area as a significant factor. Another 40 percent already resided there or were influenced by the proximity to their home (20%). The remaining 20 per cent intended to relocate due to the job opportunities.

Figure 9: Reasons for choosing elsewhere in Estonia or another country as intended destination, N=5, (%) (more than one answer possible)
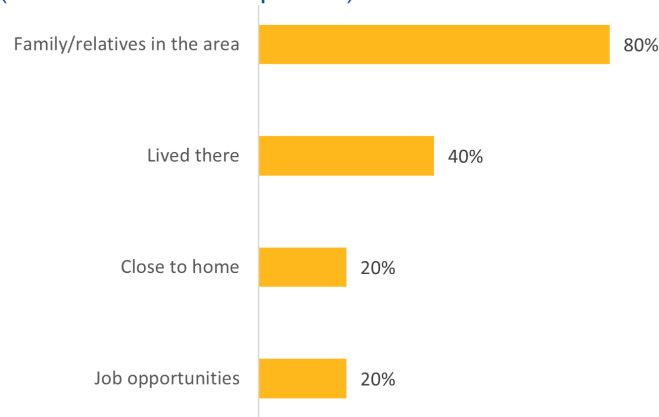
3. Education and Employment: Profile and Prospects

Main spoken language

The survey found that a majority of respondents (52%) speak Russian as their main language at home, while the second most common language used in this round of surveying was Ukrainian (48%).

Other spoken language(s)

A large part of respondents speak Ukrainian (55%) and Russian (50%) as a second language. This was followed by English (42%), Estonian (26%). German (4%) and Polish (2%) were less commonly spoken languages.

Figure 10: Main spoken language (%)
(more than one answer possible)

Figure 11: Other spoken languages (%)
(more than one answer possible)
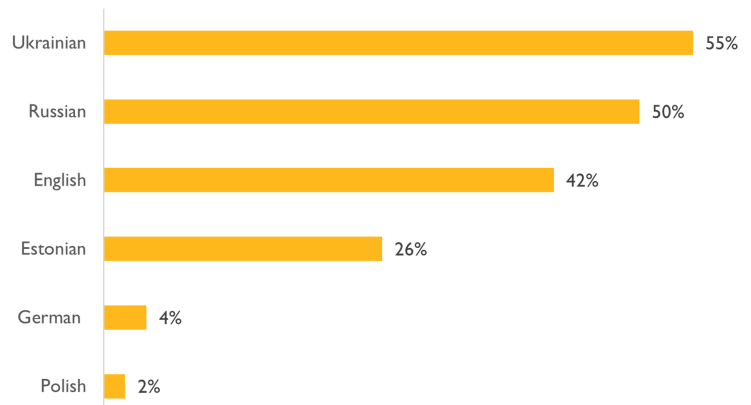
Education level

More than half of refugees from Ukraine (55%) had completed a tertiary education. Twenty-two per cent had an upper secondary/vocational or lower secondary (11%) level of education. 12 per cent claimed to have a post-secondary non-tertiary level of education.

Female respondents were more likely than their male counterparts to have reached tertiary education as their highest education level (55% versus 52%), while male respondents were slightly more likely than female respondents to have reached an upper secondary/vocational as their highest education level (23% versus 22%).

Figure 12: Education level, by gender and total (%)

Employment status before leaving Ukraine versus current status

Over half (58%) of all respondents were employed before leaving Ukraine, 12 per cent were retired, 16 per cent were pursuing their studies and on maternity/paternity leave (8% each), 6 per cent were self-employed, 3 per cent were unemployed and looking for a job and 2 per cent were unemployed and not looking for a job, remaining two per cent were daily workers. However, these numbers were noticeably different when asked about their current employment in Estonia. Thirty-three per cent declared being unemployed and looking for a job, while the share of employed and self-employed decreased to 36 per cent and one per cent respectively. The share of those declaring to be unemployed and looking for a job increased from three per cent before the journey to 33 per cent while in Estonia.

Figure 13: Employment status before leaving Ukraine and current employment status (%)
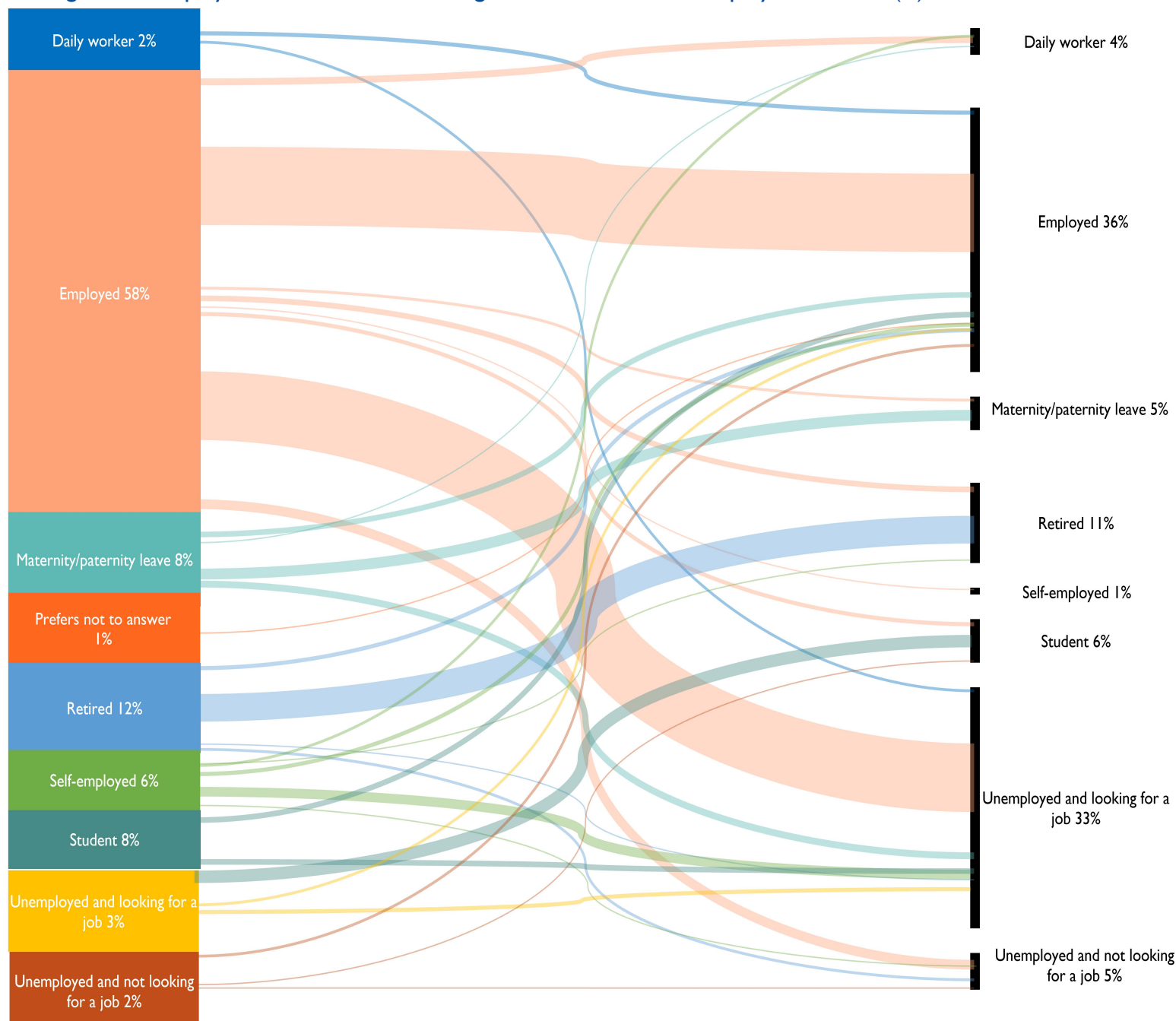
Among those currently in employment (employed, self-employed or daily workers), 40 per cent were working in elementary occupations (e.g. cleaners, street vendors), 15 per cent employed in services and sales positions, 10 per cent classified as professional workers (e.g. doctors, teachers, programmers), 6 per cent clerical support workers, 4 per cent plant machine operators/assemblers, 3 per cent were employed as skilled agricultural workers, another 4 per cent worked as managers, technician and associate professionals (2% each). The remaining sample were employed in various other sectors, such as finance, insurance, art, entertainment, recreation, and other areas of employment.

Figure 14: Occupation before leaving Ukraine and current (%)
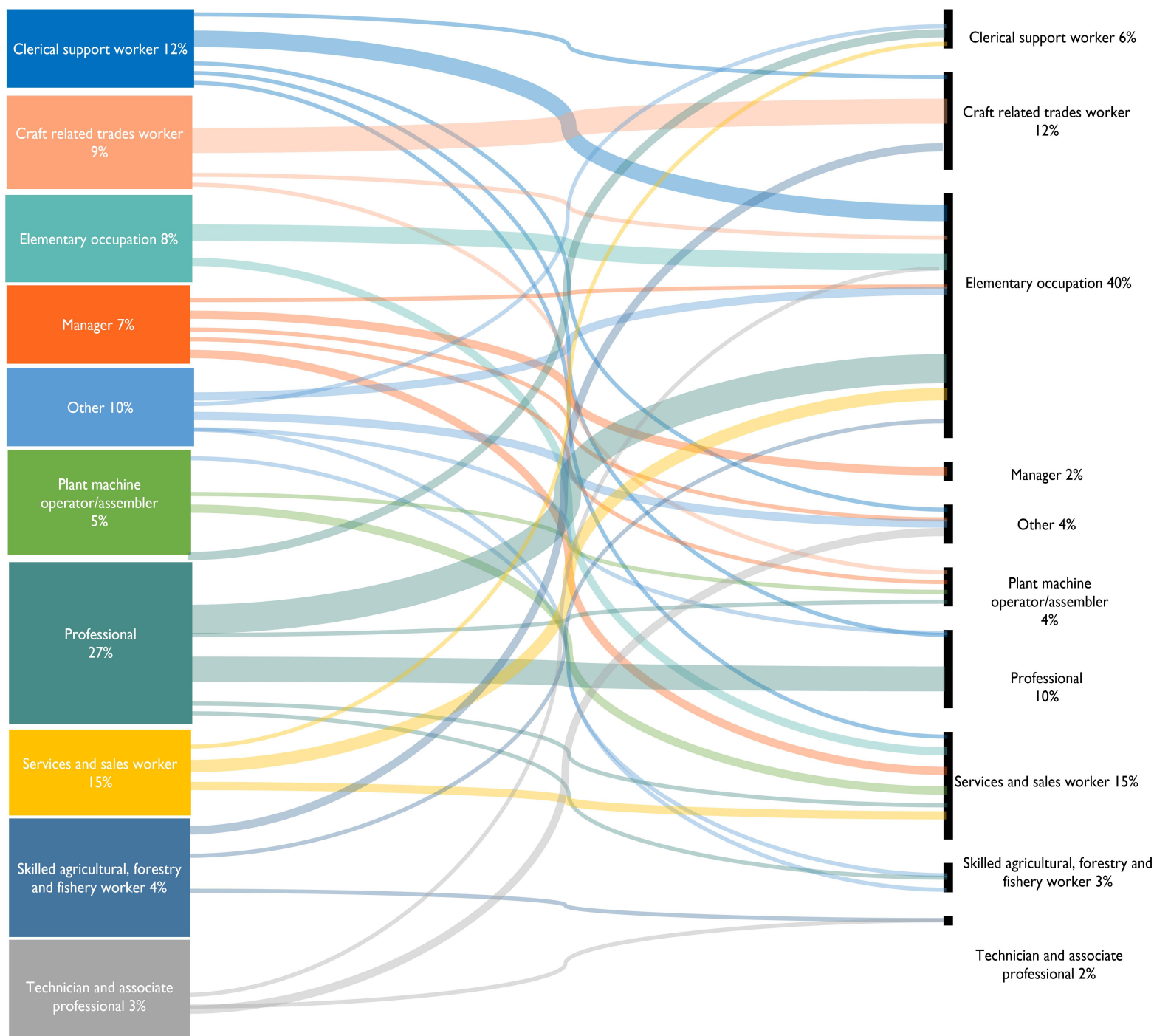
4. Registration and Inclusion Services

Protection applications

Out of the 247 respondents, 94 per cent applied for asylum or temporary protection, while 6 per cent declared not having registered for protection in Estonia. The percentage of men who have not applied for temporary protection status is higher than that of women (10% versus 5%).

Among those who answered "No" (N=15), 67 per cent claimed to be ineligible for temporary protection status, 13 per cent declared wanting to register in the future, while another 13 per cent were planning to leave Estonia soon. Seven percent of the respondents stated that their application for protection had been denied.

Access to finances

Out of 143 respondents who provided answer, 52 per cent had been able to withdraw cash from ATM or make payments using their own debit/credit, while 44 per cent had not. The remaining 4 per cent preferred not to answer.

Figure 15: Have you registered for (EU) temporary protection or applied for any protection/refugee status with national authorities? (%)
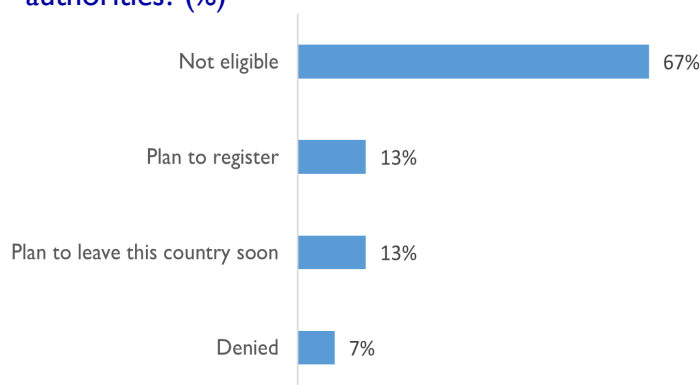
Figure 16: Ability to withdraw money with a foreign debit/credit card (%)

Figure 17: Has opened a personal bank account in Estonia (%)
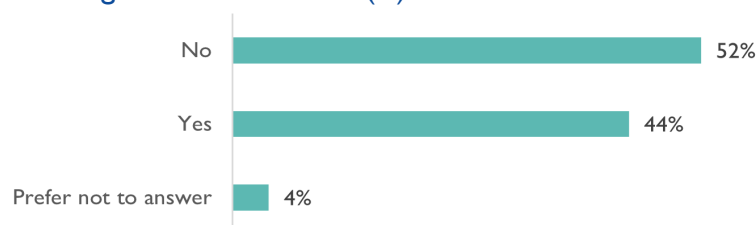
93 per cent of respondents had a personal bank account in Estonia at the time of the interview, while 7 per cent did not.

Figure 18: Reason for not opening a personal bank account in Estonia (%)

Out of those who indicated that they had not opened a personal bank account in Estonia, 50 per cent were planning to open it, 30 per cent had no need to do so. Another 10 per cent were planning to leave the country, and the remaining 10 per cent had other reasons.

Out of the respondents who had children, 62 specified if they were enrolled or not in schools or kindergarten. 45 per cent indicated that they were able to enroll their children in local schools, while 27 per cent had children enrolled and attending both online and local schools.

Moreover, 21 per cent indicated that they had been able to enroll their children in online education in Ukraine. The remaining 7 per cent had not been able to enroll their children in any education facility at the time of the interview.

Out of those that indicated in the previous question that they had been unable to enroll their children in an education facility (N=4), 50 per cent were planning to enroll and another 50 per cent had other non-specified reasons.

Figure 19: Has enrolled children in an education facility (%) N=62
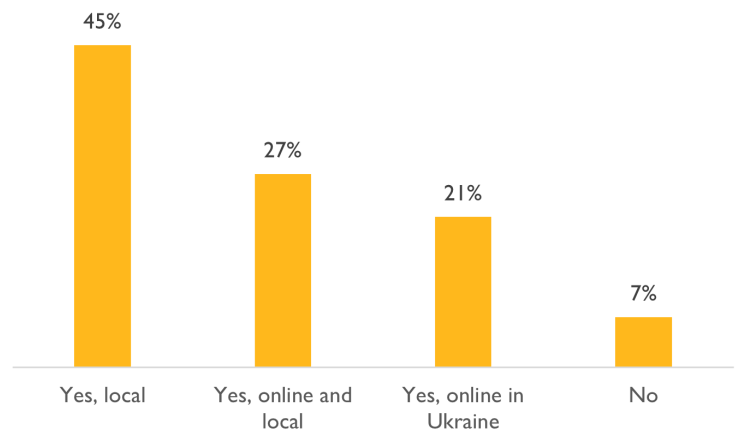
Consular services

Sixty-one per cent of respondents indicated that they knew how to contact a consular representative, while thirty-nine per cent did not.

Out of those who responded to the previous question (N=143), 85 per cent indicated that they had not reached out for consular support at the time of the assessment, while another 14 per cent had. The remaining one per cent preferred not to answer.

Figure 21: Knows how to contact a consular representative?

Figure 22: Has reached out for consular support in Bulgaria (%) N=143

5. Immediate Needs and Assistance Received

Immediate needs at the moment

The three primary needs expressed by the respondents were employment (27%), health services (26%), and financial support (25%).

This was followed by the need for support for documentation and registration (15%), long-term accommodation (12%), language courses and medicines (11% each). Also, others reported to be in need of support with food products (10%), clothes and shoes, education/training for adults (6% each).

Figure 23: Needs at the moment (%)
(more than one answer possible)

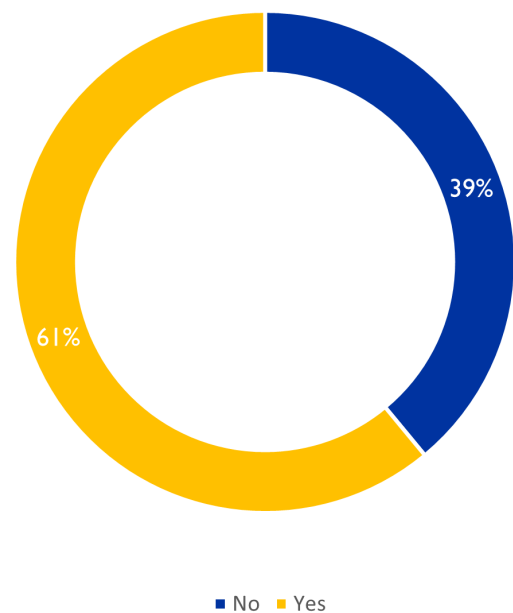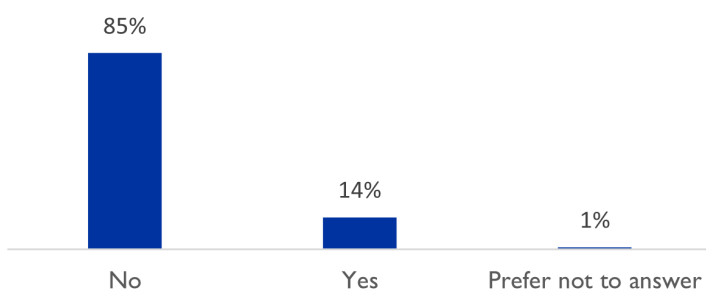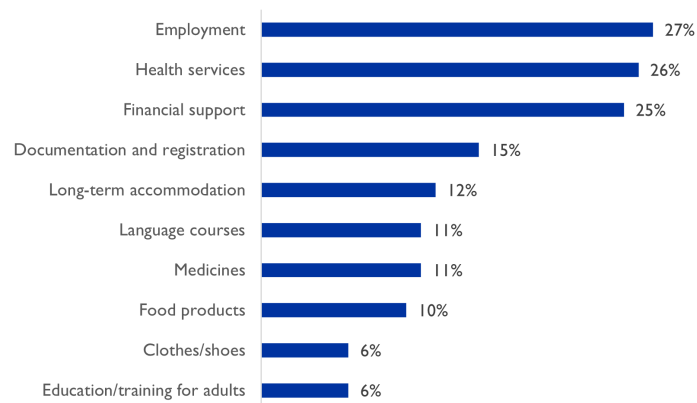| Need	%
Employment	27%
Health services	26%
Financial support	25%
Documentation and registration	15%
Long-term accommodation	12%
Language courses	11%
Medicines	11%
Food products	10%
Clothes/shoes	6%
Education/training for adults	6%

Assistance received in Estonia

82 per cent of all refugees in the sample reported to have received some kind of support or humanitarian assistance, while 18 per cent did not receive any support before the interview. Eighty-six per cent indicated that they had received free transportation as the main support, followed by help with food (70%), financial support (54%), long-term accommodation (33%), language courses (19%), personal hygiene and sanitary supplies (15%), clothes and shoes (13%), toys (6%), psychological counseling (4%), employment (3%) and vouchers (1%).

Areas in which information is needed to get more assistance

Out of those who indicated that they did not know where to find assistance (11 per cent out of the total sample), 37 per cent indicated that they needed more information on how to get financial support, 30 per cent needed more information on long-term accommodation, 44 per cent on employment opportunities and language courses (22% each).

Other relevant areas where information was needed were documentation and registration (19%), health services (19%), clothes and shoes (15%), general information, household goods and food products (11% each).

Furthermore, 10 percent of the respondents (out of N=143) reported facing challenges in accessing the support they needed. None of the male respondents reported encountering such challenges, in contrast to 12 percent of women within the sample who experienced difficulties.

Figure 24: Areas where more information for assistance is needed (%) N=27 (more than one answer possible)

Area	%
Financial support	37%
Accommodation	30%
Employment	22%
Language courses	22%
Health services	19%
Documentation	19%
Clothes/shoes	15%
Food products	11%
Household goods	11%
General info.	11%
Education for adults	7%
Personal hygiene	4%
Business support	4%
Transportation	4%
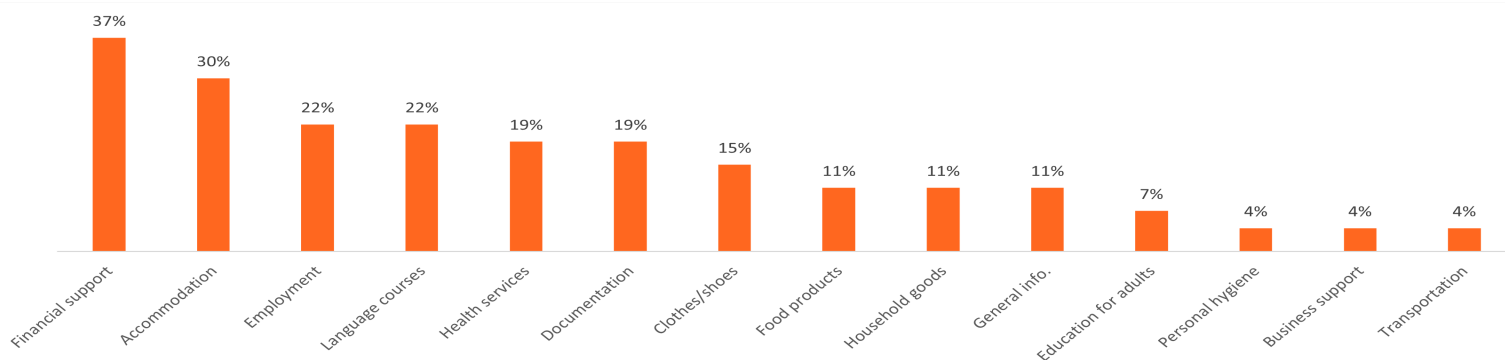
6. Challenges in the Country of Displacement

Experiences of discrimination

23 per cent of respondents indicated having experienced discrimination in their country of displacement. In contrast, 76 per cent indicated having no such experience.

The remaining one per cent did not know. When looking at the data disaggregated by gender, female respondents were more likely to have experienced discrimination than their male counterparts (26% versus 13%).

Figure 25: Reported experiences of discrimination (%)

■ Does not know ■ No ■ Yes

Inclusion challenges

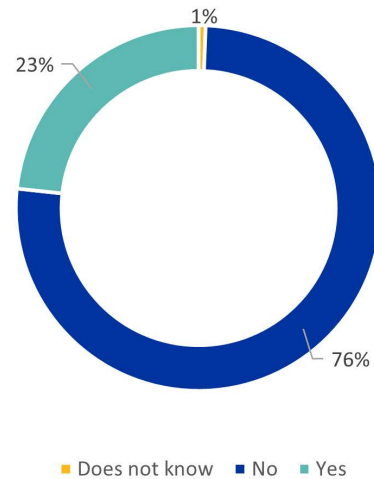When asked about the challenges they had encountered in Estonia, respondents indicted finding a suitable job (25%) and facing language barriers (24%) as the most prevalent difficulties. Other notable difficulties included securing longg-term housing (17%), obtaining recognition for their professional skills, diplomas, and university experience (9%).

Additionally, respondents highlighted various other issues, such as financial constraints (8%), dealing with documentation and discrimination issues (6% each), finding school and preschool for children, accessing social services/administration, and facing racism (3% each). A smaller percentage of respondents mentioned challenges related to lack of information (2%), recognition of disabilities, and obtaining information about employment opportunities (1% each). The remaining one per cent of respondents preferred not to answer.

Figure 26: Top 15 inclusion challenges, (%) (more than one answer possible)
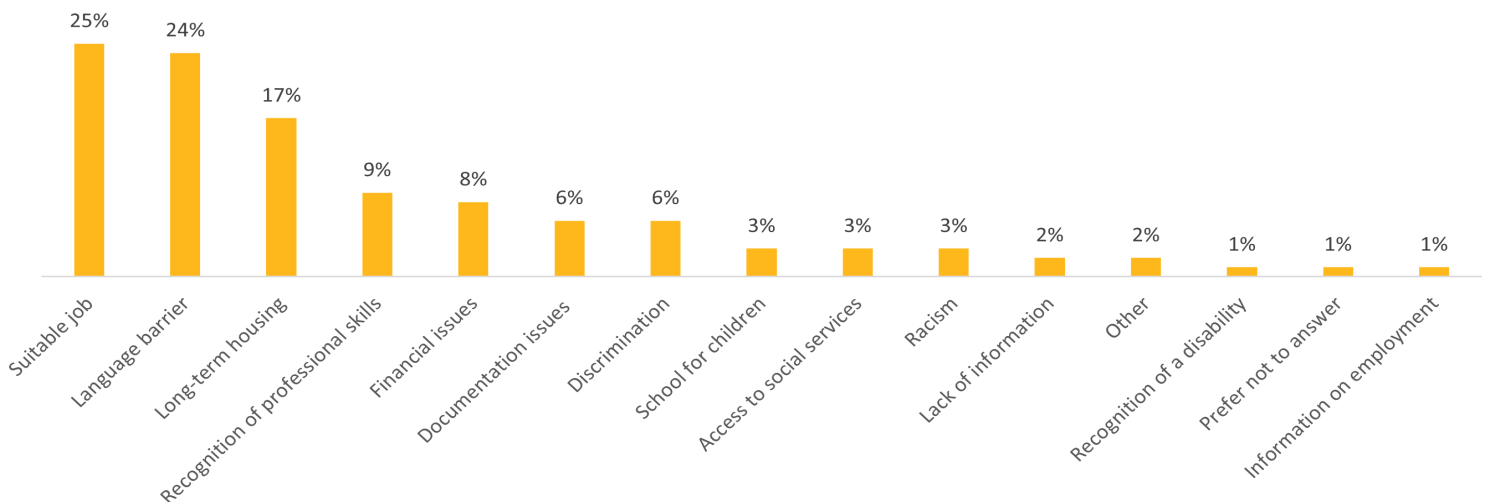
7. Current Group Composition

Travel mode

Seventy per cent of the sample declared to be travelling in a group, in comparison with the other 30 per cent who were travelling alone. Female respondents were less likely to be travelling alone in comparison to their male counterparts (28% versus 37%).

Out of the 71 per cent travelling in a group, 95 per cent were travelling with immediate family/ household members, 6 per cent with other relatives and 2 per cent with friends and neighbours. Overall, the average group size including the respondent was about 3 persons.

Table 2: Travel mode by gender and total

Travelling in a group/alone	Women	Men	Total
Alone	54	19	73
With immediate family/household members	135	30	165
Relatives	7	4	11
Friends and neighbors	2	2	4

Travelling with persons with health conditions and disabilities

A considerable fraction of respondents (24%, N=59) indicated that their group/household included persons with serious health conditions or specific needs, while 75 per cent did not reply to be in a group with at least one person with a serious health condition. The remaining 1 per cent claimed not knowing.

More specifically, 95 per cent of the respondents reported having in their group (including themselves) at least one person with a chronic disease or a serious medical condition. Sixty-four per cent were traveling with a person with visual impairment. This was followed by those traveling with difficulty walking/climbing steps (15%), wounded/injured persons (3%), difficulty remembering/concentrating (2%).

Figure 27: Respondents travelling with at least one person with a serious health conditions (%) N=59 (more than one answer possible)

Chronic disease	95%
Visual impairment	64%
Difficulty walking/climbing steps	15%
Wounded/injured	3%
Difficulty remembering/concentrating	2%
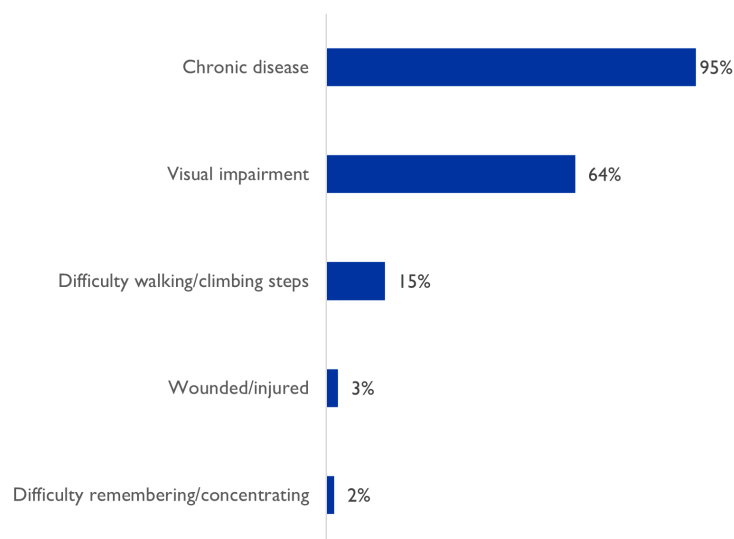
8. Methodology

This report is based on a survey of displacement patterns, needs and intentions conducted by IOM's Displacement Tracking Matrix (DTM) in the 11 countries included in the Regional Response Plan for Ukraine in 2023: 6 countries neighbouring Ukraine – Belarus, Hungary, Poland, Republic of Moldova, Romania and Slovakia – and other 5 countries particularly impacted by the arrivals of refugees from Ukraine since the start of the war in February 2022 – Bulgaria, Czechia, Estonia, Latvia and Lithuania. The analysis presented in this report is based on data collected between January and March 2023 through a network of more than 150 enumerators, with various timelines and specific survey tools - depending on the country context. Nevertheless, the sampling approach, main definitions and features of the survey tool make country-level datasets comparable.

Face-to-face surveys were conducted by trained enumerators with adult refugees from Ukraine and other TCNs (18 years of age and above). Prior to the start of the survey, all enumerators were trained by IOM on DTM standards, the use of Kobo application, IOM approach to migrants' protection and assistance, the ethics of data collection and the provision of information and referral mechanisms in place.

Respondents were approached in a simple random sample by enumerators at selected entry, exit, transit points and accommodation centres. In border crossing point areas, both persons entering/exiting by car, by bus, by foot and by train were interviewed.

The survey was anonymous and voluntary. Surveys were administered only if consent from the respondent was given. The respondent could stop the survey at any time.

The questionnaire was available in Ukrainian, Russian, English language. The preferred language was determined by the interviewee. All responses were checked for any systematic issues by enumerator and this process did not identify any problems. Only fully completed surveys were taken in account for this report.

Country-level implementation and limitations

The sampling framework was not based on verified figures of refugees from Ukraine and TCNs entering through the various BCPs or staying in the various regions (counties, districts, rayons) across each of the country where surveys were conducted. This is due to the limited availability of comparable baseline information across countries. The geographic spread of enumerators deployed and locations targeted captures most of the key arrival, transit and destination points. Whilst results cannot be deemed representative, the internal consistency within the data within each country and at the regional level suggests that the findings of the current sampling framework have practical value.

The survey respondents were chosen at random from locations within four primary transit and reception locations that receive high volumes of individuals entering Estonia either via public or private transport. Whilst every attempt was made to capture all types of arrivals, the operational reality of fieldwork was confronted with different levels of accessibility of transit and stay locations and the different availability of possible target individuals to comfortably spend 10-20 minutes responding to the questionnaire depending on a mix of personal conditions.

In Estonia, DTM was activated in March 2023. The data for this report was collected between 15 March and 31 March 2023. Overall, 247 valid surveys were collected by a team of 5 enumerators (2 female and 3 male) deployed in 3 different provinces.

Sixty-six per cent of surveys were collected in Harju, 27 per cent in Tartu, 6 per cent in Ida-Viru, one per cent in Hiiu region. Enumerators were approaching respondents in collective centers, open spaces, dormitories, humanitarian aid distribution centers. The interviews have been conducted in Russian and Ukrainian languages.

DTM

Displacement Tracking Matrix (DTM) is a system to track and monitor displacement and population mobility. The survey form was designed to capture the main displacement patterns – origin country and region – for refugees of any nationality fleeing from Ukraine because of the war. It captures the demographic profiles of respondents and of the group they are travelling with, if any; it asks about intentions relative to the intended final destination and prospects of permanence in the country of the survey/first reception; it gathers information regarding a set of main needs that the respondents expressed as more pressing at the moment of the interview.

Since the onset of the war in Ukraine, several IOM's DTM tools were deployed in countries neighbouring Ukraine and in other countries particularly impacted by the new arrivals of migrants and refugees from Ukraine.

For more information, please consult: https://dtm.iom.int/responses/ukraine-response

DTM is part of IOM's Global Data Institute.