

ESTONIA

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

July – September 2023
Country Report & Data Analysis

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Publisher

International Organization for Migration
Regional Office for South-Eastern Europe, Eastern
Europe and Central Asia
Dampfschiffstrasse 4/10-11, 1030 Vienna, Austria
+43 1 581 22 22
Website: <https://rovienna.iom.int/>
Contact: ROViennaDataResearch-Newsletter@iom.int

International Organization for Migration
Country Office in Estonia

Parda str. 4
Tallinn, Estonia
+372 (6) 116 088
Website: <https://estonia.iom.int/>
Contact: iomtallinn@iom.int

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KEY FINDINGS

Top 5 oblasts* of origin:

- Kharkivska (14%)
- Khersonska (11%)
- Donetsk (11%)
- Zaporizka (8%)
- The city of Kyiv (7%)



* Regions in Ukraine

Needs:

Language courses (30%)

Financial support (28%)

Employment (18%)

Documentation and registration (17%)

Multiple answers possible

Intentions:

- No intentions to move soon (87%)
- Move to place of origin in Ukraine (2%)
- Move to another country (6%)
- Move within Estonia (1%)
- Don't know (4%)

Top destinations:

- Germany
- Poland
- Norway



Assistance*:

- Free transportation (83%)
- Food items (78%)
- Financial support (66%)
- Language courses (62%)

**Multiple answers possible*

Employment:

- Employed (60%)
- Unemployed and looking for a job (19%)
- Students (6%)
- Retired (5%)
- On a parental leave (5%)

Inclusion challenges*:



45%
Language



32%
Employment



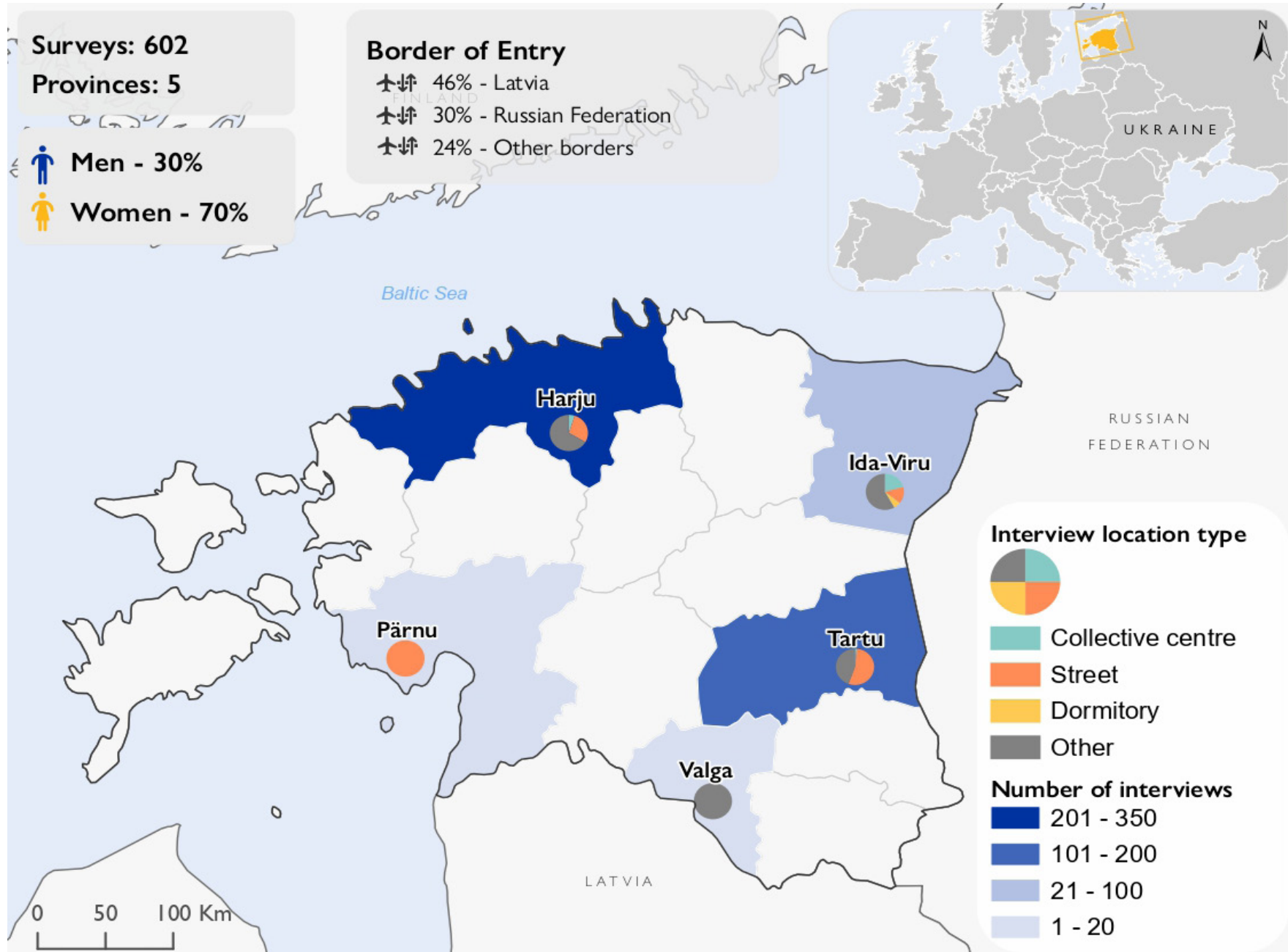
27%
Housing



12%
Finances

**Multiple answers possible*

Map I: Estonia, surveys deployed, oblasts of destination in Ukraine



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I. Socio-Demographic Profile

Oblast (region) of origin

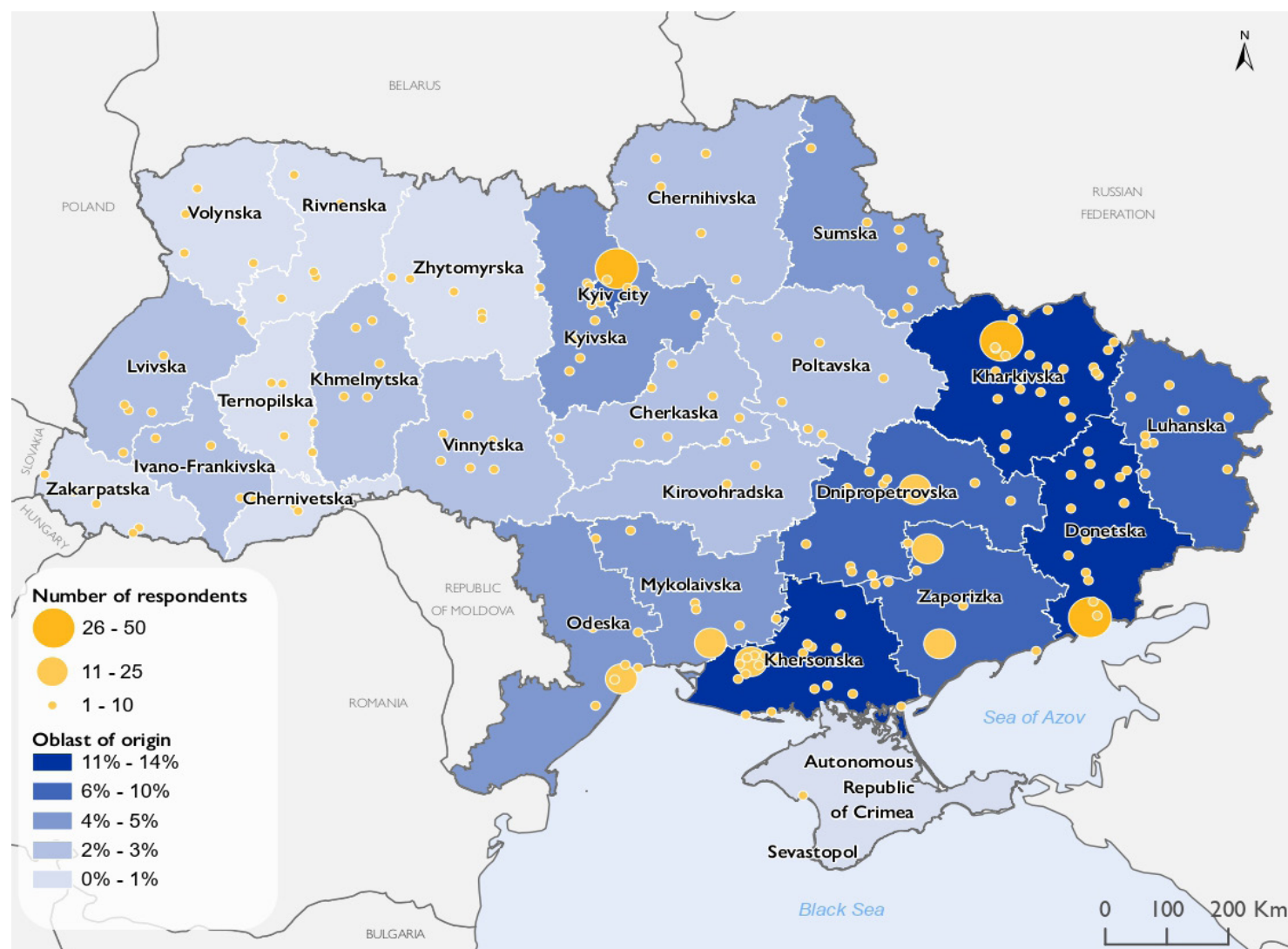
Respondents interviewed for this survey originated from several different regions across Ukraine, with a particular concentration in the eastern and southern parts of the country.

The majority of respondents (58%) came from only six regions of origin or habitual residence before leaving Ukraine, namely Kharkivska (14%), Khersonska (11%), Donetsk (11%), Zaporizka (8%), Kyiv city (7%), Luhanska (7%).

Other highly represented regions of origin include: Dnipropetrovska (6%), Sumska (5%), Mykolaivska (4%), Odeska (4%).

The remaining respondents (23%) resided in 13 other regions throughout Ukraine. These included Kyivska (4%), Cherkaska, Poltavska (3% each), Chernihivska, Kirovohradska, Vinnytska (2% each), Chernivetska, Ivano-Frankivska, Khmelnytska, Lvivska, Rivnenska, Zakarpatska (1% each).

Map 2: Oblast of origin before leaving Ukraine (%)



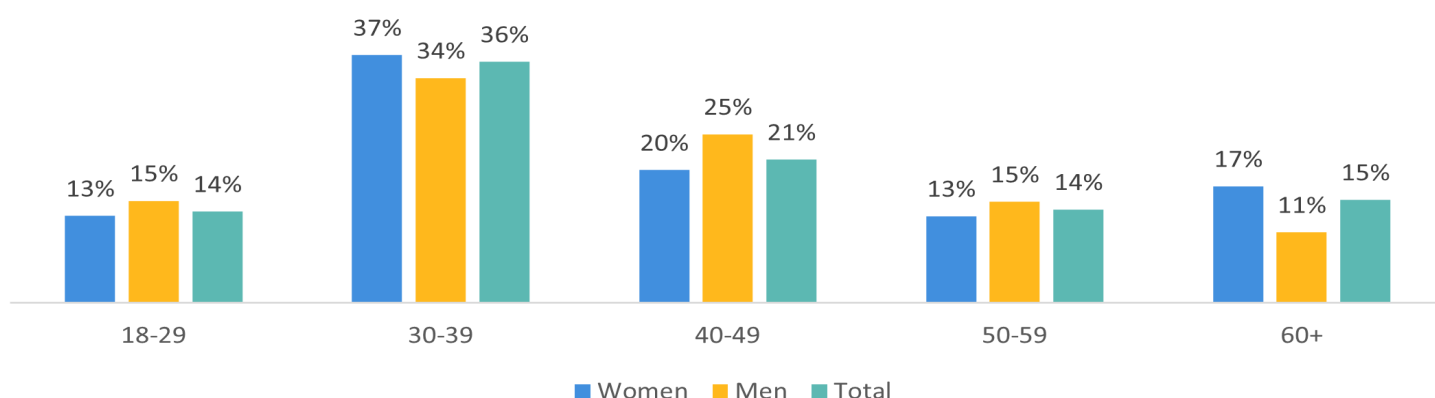
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Gender and age

Seventy per cent of the respondents were women, while men constituted 30 per cent of the sample. Over one-third of respondents were between 30 and 39 years old (36%), followed by those between 40 and 49 years old (21%), and between 18 and 29 years (14%). The average age of women in the sample (39 years old)

was higher than the average age of men (37 years old). Among women, the largest age group represented was 30-39 year olds (37%), followed 40-49 year olds (20%). Among men, the most represented age groups were 30-39 year olds (34%), followed by 40-49 year olds (25%).

Figure 1: Age by gender and total (%), (N=604)

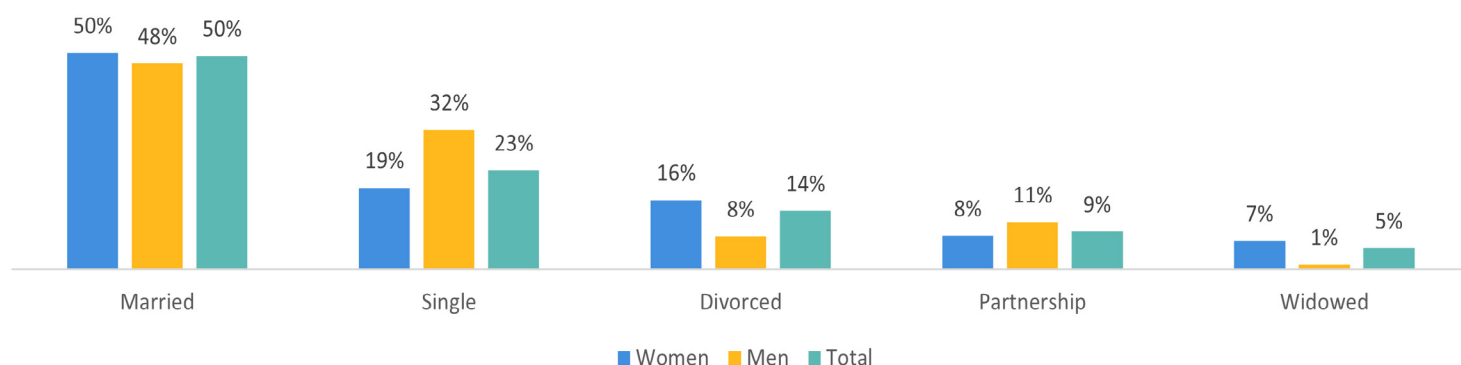


Marital status

Half of the respondents were married (50%), while another 22 per cent were single. Others were divorced or in a partnership (14% and 9%, respectively). The remaining five per cent of respondents were widowed. The share of married persons was slightly higher among

women than men (50% versus 48%), while women were more likely to be widowed than men in the sample (7% versus 1%). Conversely, a higher percentage of men reported being in partnerships compared to women (11% versus 8%).

Figure 2: Marital status (%), (N=604)

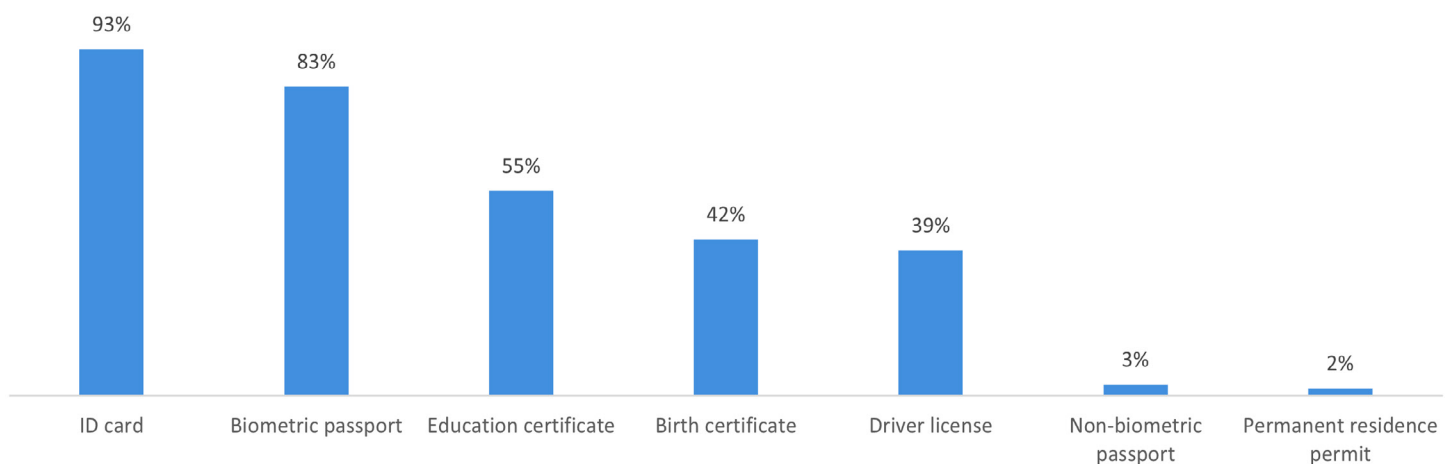


Documents possessed at the time of interview

The majority of respondents travelled with multiple documents. Ninety-three per cent carried their ID card, 83 per cent had a biometric passport, and 55 per cent possessed an education certificate. Other commonly

carried documents included birth certificates (42%), driver's licenses (39%), non-biometric passports (3%), and permanent residence permits (2%).

Figure 3: Documents in respondents' possession at the time of interview (%), (N=604) (multiple answers possible)



Average time since initial displacement

To calculate the approximate duration of displacement, Table I lists the amount of time passed from the respondent's initial date of displacement from Ukraine to the date of interview. The time spent outside of Ukraine reported by the respondents corresponds to the timeline of the conflict.

Forty per cent of the respondents reported being displaced from Ukraine since the first three months following the outbreak of the conflict. Nineteen per cent have been displaced before 2022. Between May and December 2022, the rate of displacement fluctuated between one and seven per cent, indicating that 28 per cent of respondents had been displaced between 9-16 months.

Eleven per cent of respondents initially displaced in 2023 have spent less than 8 months displaced. From January to September, the fluctuation ranged between less than one and one per cent, except for August when seven per cent of respondents were initially displaced.

Table I: Approximate time spent in displacement (%)

Date of the initial displacement	Length of displacement	(%) of respondents
Before 2022	2 years or more	19%
Jan-Mar 2022	18-20 months	31%
Apr-Jun 2022	15-17 months	23%
Jul-Sept 2022	12-14 months	11%
Oct-Dec 2022	9-11 months	5%
Jan-Mar 2023	6-8 months	1%
Apr-Jun 2023	3-5 months	2%
Jul-Sept 2023	<1-2 months	8%

2. Intentions

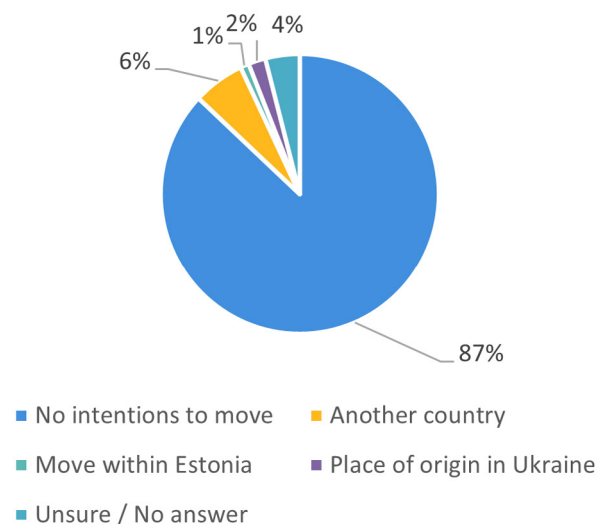
Move elsewhere or stay

Eighty-eight per cent of respondents intended to remain in Estonia, either in their current location (87%) or in a different location within the country (1%) in the near future. Six per cent intended to go to another country, while two per cent intended to return to their place of origin in Ukraine. The remaining four per cent were uncertain about their plans.

Women were slightly more likely to stay in their current location than men (88% versus 84%), and women were less likely to relocate to a foreign country than men (6% versus 7%).

Fifty per cent of respondents plan to return to Ukraine when it is safe to do so, while 14 per cent do not intend to return at all. Twelve per cent intend to return regardless of the situation in the country. The remaining 24 per cent remain unsure about their plans.

Figure 4: Respondents' intentions to move (%), (N=604)



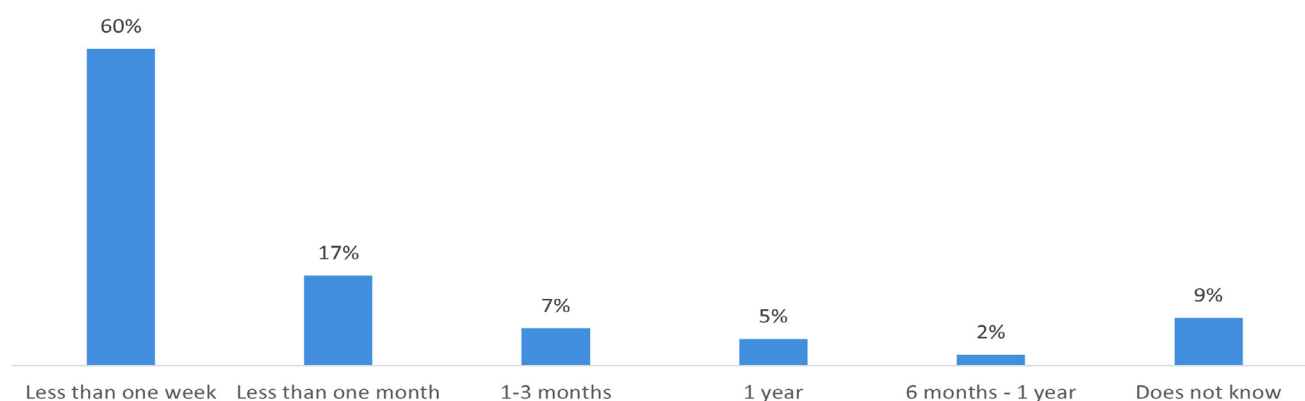
Intended length of stay

Respondents who intended to relocate within Estonia, return to their place of origin in Ukraine, or choose another country (N=58) were asked about their expected duration of stay in their current location.

Sixty per cent intended to stay for less than one week, and an additional 17 per cent planned to stay for less than one month, indicating that their current location

primarily served as a transit point. Seven per cent of respondents intended to stay between one and three months, while five per cent anticipated a stay of more than one year. Two per cent intended to stay for six months to one year. Notably, nine per cent remained uncertain about the duration of their stay.

Figure 5: Intended length of stay (%), (N=58) (multiple answers possible)



Intended oblast of destination in Ukraine and reasons to go back

Among respondents intending to return to Ukraine (N=11), all expressed the intention to return to their oblast of origin. Of those with the intention to return, 5 respondents cited reuniting with family members as their primary purpose, while 3 respondents indicated their intention to return due to facing resource

difficulties in the country of displacement. Additionally, 2 respondents mentioned other reasons, including a lack of job opportunities or improved situation in Ukraine. The remaining 4 respondents cited various other reasons, such as visiting relatives or the desire to return home.

Immediate needs upon return

Among the respondents who intended to return to Ukraine (N=11), 5 respondents indicated their top needs would be financial support and assistance with transportation. Other needs included general

information, job placement, and medical needs (1 respondent each). Six respondents intending to return to Ukraine said they do not need any immediate support.

Intended country of destination

Among those who intended to go to another country (N=39), the top two intended destinations were Germany and Poland (12 and 10 respondents respectively). Four respondents intended to move to

Norway. Other respondents intended to relocate to Lithuania and Finland (2 respondents each), Czechia, Canada, Anguilla, the Netherlands, and the United States of America (1 respondent each).

Reasons for selecting intended destination

The survey asked respondents who planned to relocate to another country (N=39) to indicate the reasons for selecting their intended destination. Twelve respondents cited the presence of friends in the destination country as a significant factor in their decision. Also, 8 respondents mentioned the protection system in the destination country, while 5 respondents stated that relatives played

a crucial role in shaping their choice to relocate. Four respondents mentioned the availability of accommodation as a factor influencing their decision, and 2 respondents stated they had received a job offer. A few respondents cited job opportunities (1 respondent), schools for children (1 respondent), or the presence of other people in the destination country (1 respondent).

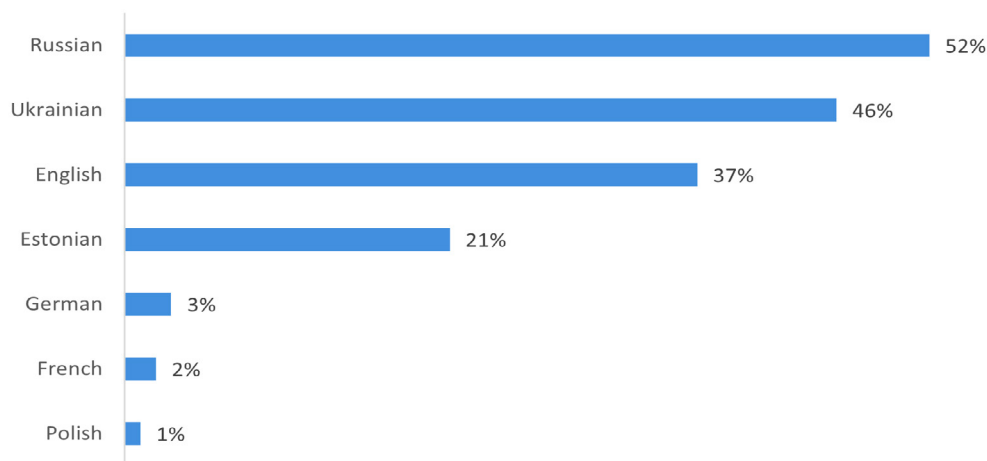
3. Education and Employment: profile and prospects

Main language

Over half of respondents (54%) speak Ukrainian as their main language at home, while Russian was the second most common language among respondents (46%). When asked about other languages spoken, 52 per cent of all respondents mentioned Russian and another 46

per cent mentioned Ukrainian. In addition, 37 per cent of respondents spoke English and 21 per cent spoke Estonian language. Other mentioned languages included German (3% of respondents), French (2%), and Polish (1%).

Figure 6: Other spoken languages (%), (N=591) (multiple answers possible)



Estonian language proficiency and courses

Out of 517 respondents who provided their answers, 64 per cent had taken Estonian language courses, while 34 per cent had not and the remaining 2 per cent did not specify.

Ninety-seven per cent of interviewees indicated that the Estonian language courses were provided free of charge, while three per cent had to pay for their language courses. Among those who took Estonian language courses (N=333), 82 per cent reported that

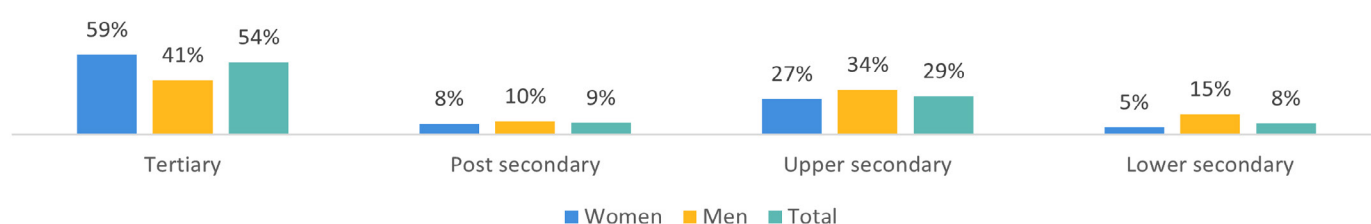
the language courses were offered by Estonian migration authorities, while 8 per cent attended online language courses. Five per cent received language courses from their employers, 3 per cent attended language courses privately, 2 per cent learned at school, and one per cent learned through an agency. The remaining five per cent mentioned other sources, such as universities or the Unemployment Insurance Fund, as providers of Estonian language courses.

Education level

Over half of respondents (54%) had completed a tertiary education. Thirty-seven per cent had an upper secondary/vocational or lower secondary level of education (29% and 8% respectively). Additionally, 9 per cent mentioned having post-secondary education. Among respondents, women were more likely than

men to have reached tertiary education as their highest education level (59% versus 41%), while men were more likely than women to have reached the upper secondary/vocational level as their highest level of education (34% versus 28%).

Figure 7: Education level, by gender and total (%), (N=604)



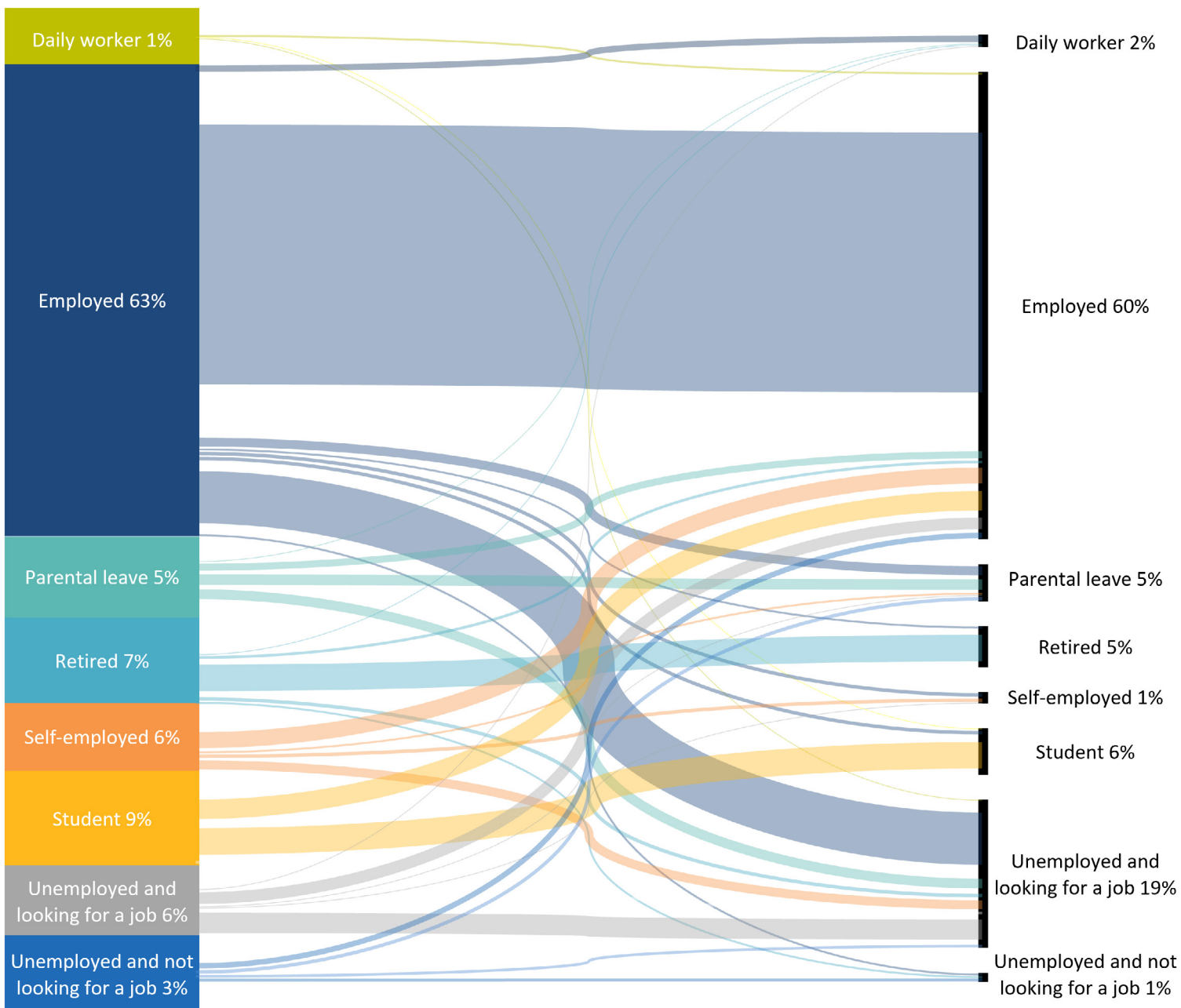
Employment status before leaving Ukraine versus in Estonia

Before leaving Ukraine, the majority of respondents (63%) were employed, while nine per cent were pursuing their studies and seven per cent were retired. Additionally, six per cent were self-employed, another six per cent were unemployed and looking for a job, five per cent were on parental leave, three per cent were unemployed and not looking for a job.

The employment rates of respondents were different

in Estonia. Sixty per cent of respondents reported being employed and one per cent reported being self-employed, while 19 per cent were unemployed and looking for a job. The share of those declaring to be unemployed and looking for a job increased from six per cent before the journey to nineteen per cent while in Estonia.

Figure 8: Employment status before leaving Ukraine and current employment status in Estonia (%)



4. Registration and Inclusion

Seventy-three per cent had already registered for Temporary Protection (TP) status or applied for another form of protection status with the national authorities in Estonia. Among those who did not apply or register (25%), 69 per cent claimed to be ineligible for

TP, while 20 per cent said they were planning to leave Estonia soon. Ten per cent were planning to register. The remaining two per cent of respondents either did not know how to register for TP or cited other reasons for not registering (1% each).

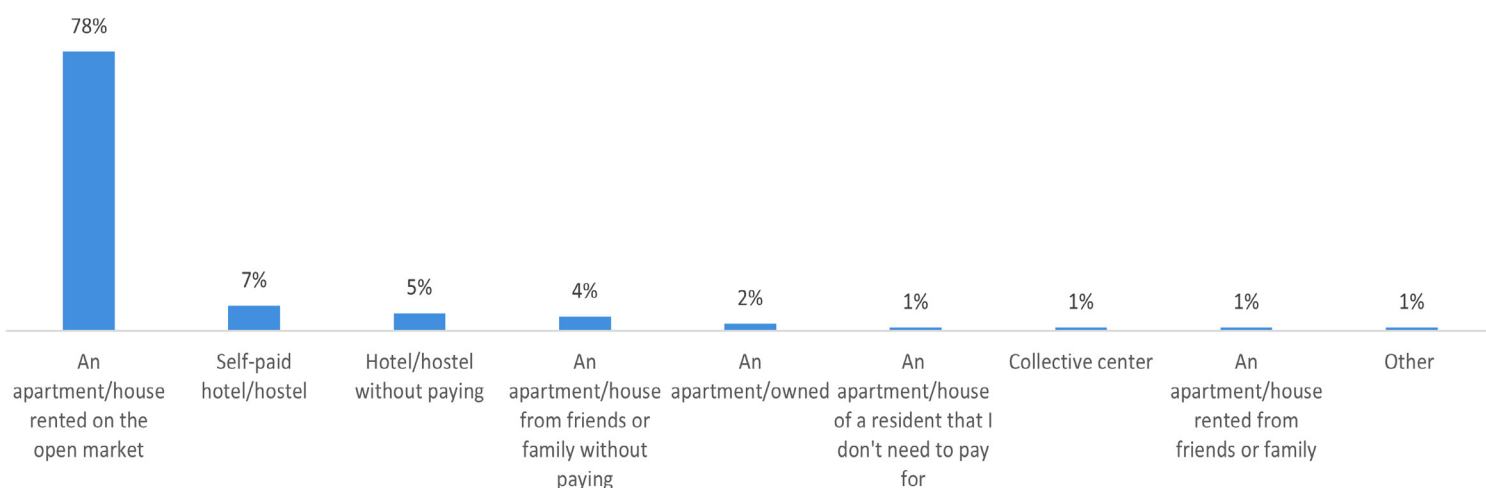
Accommodation

In terms of accommodation in Estonia, 87 per cent of respondents reported paying for their accommodation themselves, while thirteen per cent did not have to pay for their accommodation.

Seventy-eight per cent were residing in apartments rented on the open market, while others were staying in self-paid hotels and hostels (7%) or hotels and hostels

without paying (5%). Four per cent of all respondents stayed with friends, while two per cent resided in apartments of their own. The remaining respondents lived in an apartment of residents without paying rent, lived in a collective center, or lived in other non-specified accommodations (1% each).

Figure 9: Accommodation of respondents (%), (N=604)



Seventy-one per cent of respondents expressed a desire to remain in their current accommodation for as long as possible. Another 15 per cent indicated that they wished to continue living in their current accommodation until their return to Ukraine, while one per cent specified that they intend to stay in their current accommodation for as long as they find a job. Nine per cent of respondents were not sure how long

they would stay in their current accommodation, while the remaining five per cent cited other factors, including waiting for an opportunity for a better apartment or finishing studies.

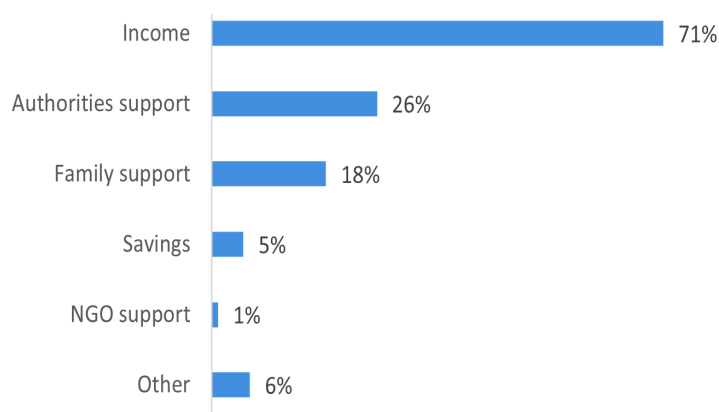
Eighty-eight per cent of respondents registered their place of stay with Estonian authorities, while twelve per cent did not.

Ability to cover expenses

Ninety-two per cent of respondents reported that their average income was sufficient to cover their monthly expenses in Estonia, while eight per cent reported they did not have sufficient income to cover their expenses.

Among respondents who answered the question about the various means they use to pay for their daily expenses (N=517), the majority mentioned income from work (71%). Twenty-six per cent mentioned support from authorities or the government, 18 per cent received support from their family and relatives, and five per cent relied on their own savings. One per cent of respondents received support from NGOs and humanitarian organizations.

Figure 10: Sources of financial support (%), (N=517) (multiple answers possible)



Finances

The survey included a specific set of questions for all respondents who had been in Estonia for longer than 3 months (N=517). These questions focused on their inclusion and registration services, including access to finance, education, and consular services.

Ninety-eight per cent of respondents reported having

a personal bank account in Estonia, while only two per cent did not. Of the two respondents who indicated that they had not opened a personal bank account in Estonia (N=12), one mentioned not needing one, while others intended to open one soon.

Education

Fifty-two per cent of all respondents had children. Of these, 203 respondents specified whether their children were attending local schools and kindergartens. Among those, 60 per cent had their children enrolled and attended local schools. Thirty-four per cent had their children engaged in both local and online education from Ukraine, while four per cent enrolled their

children in online education in Ukraine. The remaining one per cent had not been able to secure placement for their children in any educational facility. Among the respondents who indicated that they did not have children enrolled in school (N=3), they either planned to enroll their children or had other unspecified explanations.

Consular services

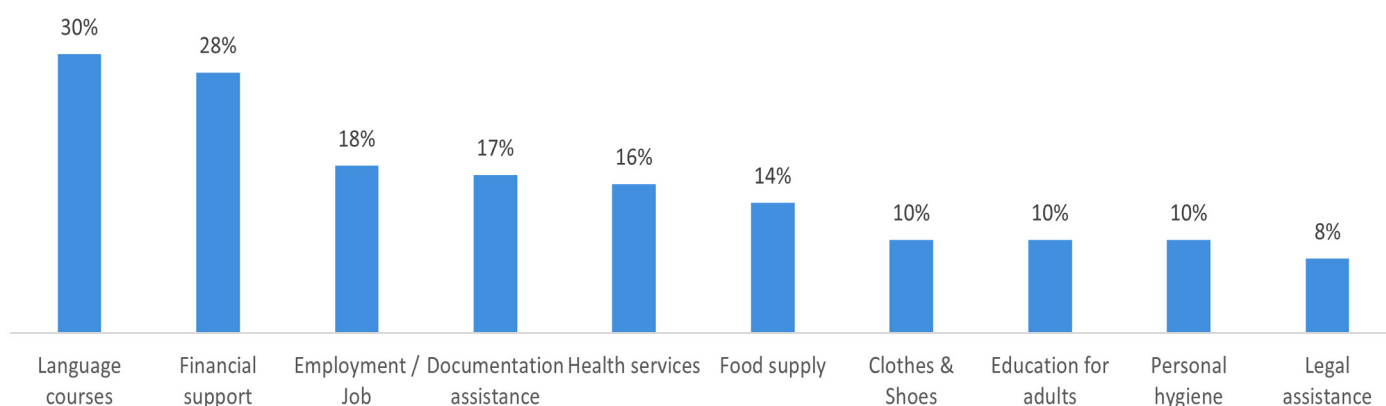
Among the respondents who have been settled in Estonia for over three months (N=517), 92 per cent stated that they know how to contact their consular

representatives. However, eight per cent of respondents did not know how. Despite this, only 31 per cent had already reached out to them.

5. Immediate Needs and Assistance

The survey asked respondents to indicate their top priority needs. The most cited needs included language courses (30% of respondents), financial support (28%), employment support (18%). Respondents also indicated a need for documentation assistance (17%), health services (16%), food supplies (14%), clothes and shoes (10%), education for adults (10%), personal hygiene and sanitary supplies (10%), legal assistance (8%). Additionally, 30 per cent of respondents stated that they did not require any immediate support.

Figure 11: Top 10 priority needs (%), (N=604) (multiple answers possible)



Assistance

Sixty-eight per cent of respondents had received some form of humanitarian assistance since their initial displacement from Ukraine.

Among these respondents (N=408), 83 per cent had received transportation support, 78 per cent

had received food supplies, 66 per cent had received financial support, and 62 per cent had received language courses. Additionally, 47 per cent of respondents received accommodation support, and 31 per cent received employment assistance.

Eighty-nine per cent of the respondents knew where to seek humanitarian assistance, while ten per cent stated they did not know where to seek assistance. The remaining one per cent preferred not to answer. Of the respondents who had been in Estonia for more

than three months or had indicated they were settled in Estonia (N=517), the majority (91%) claimed they had not experienced any difficulties when receiving humanitarian support

Areas in which information is needed to get more assistance

Among the nine per cent (N=62) who were uncertain about how to access assistance, their information needs primarily pertained to financial support (35%), health

services (21%), food supplies (18%), language courses (13%), clothes and shoes (11%), medical supplies (11%), personal hygiene and sanitary supplies (11%).

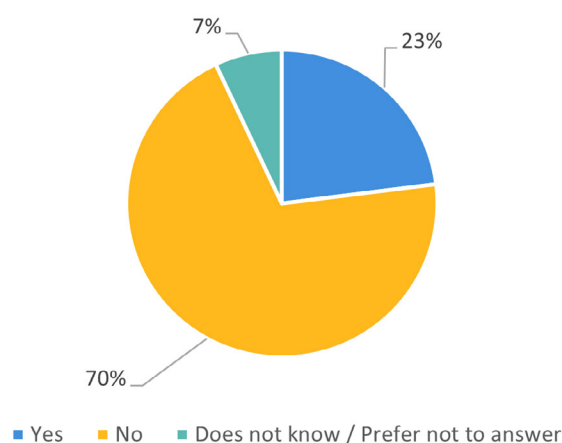
6. Challenges in the country of displacement

Experiences of unequal treatment

Seventy per cent of the respondents claim they have not experienced any form of discrimination during their journey or their time in Estonia. However, 23 per cent of respondents reported experiencing discrimination

since arriving in Estonia. The experiences most often were connected to bullying and humiliation from those of ethnic Russian origin in Estonia, securing employment, and accessing healthcare services.

Figure 12: Reported experience of unequal treatment (%), (N=604)



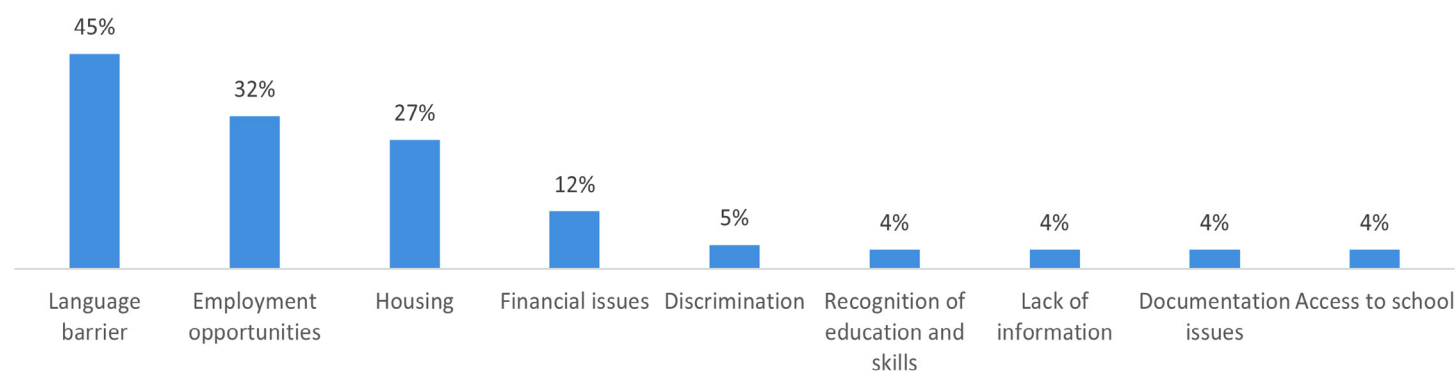
Inclusion challenges

The respondents who have been living in Estonia for more than 3 months were asked about the inclusion challenges they face.

Among these respondents (N=517), the most mentioned challenges included a language barrier (45%), limited job opportunities (32%), and securing housing (27%). Other cited challenges included

financial issues (12%) and facing discrimination (5%). A smaller percentage of respondents expressed challenges related to the recognition of their education credentials or skills (4%), lack of general information (4%), difficulties in enrolling their children in schools (4%), and documentation issues (4%).

Figure 13: Top 10 inclusion challenges among respondents (%), (N=517) (multiple answers possible)

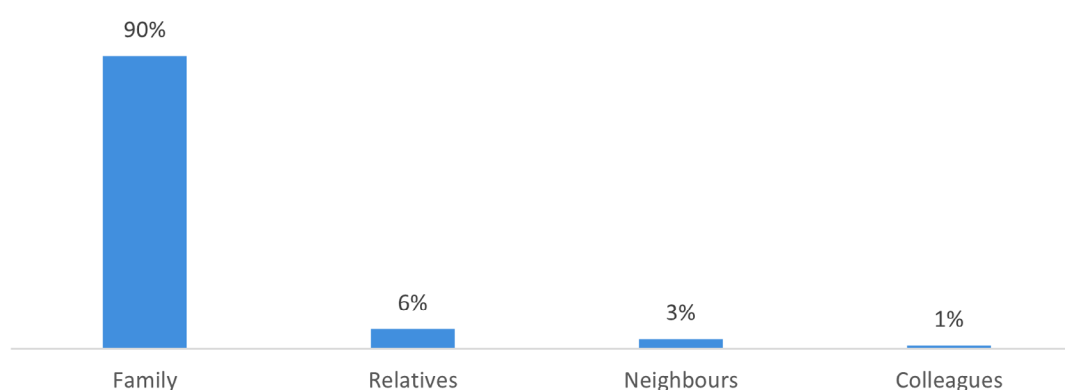


7. Group Composition

Seventy-four per cent of the respondents reported travelling in a group. Among those travelling in a group (N=446), 90 per cent were accompanied by immediate family members or individuals from their household.

Six per cent were travelling with other relatives, three per cent were travelling with friends and neighbours, and one per cent with colleagues. Overall, respondents reported travelling with 3 persons.

Figure 14: Travel group (%), (N=446) (multiple answers possible)



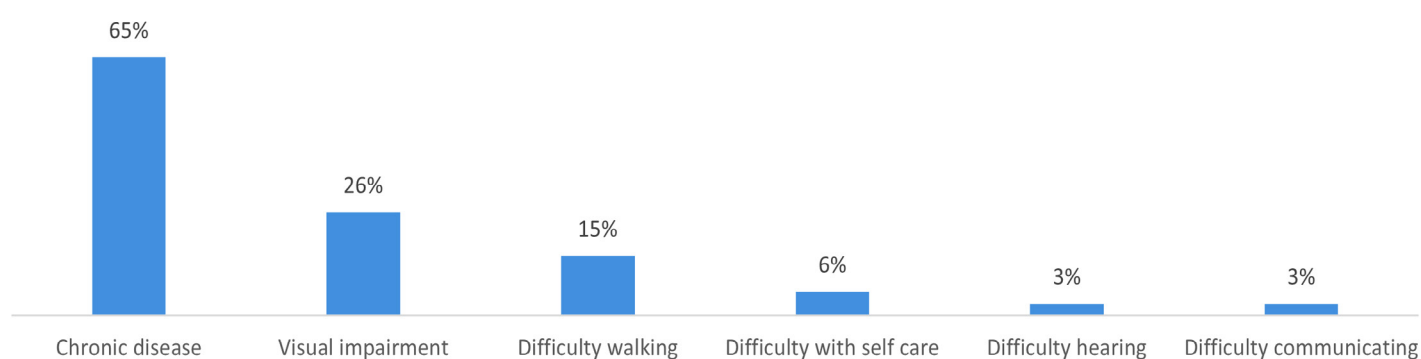
Travelling with persons with health conditions and disabilities

Twenty-four per cent of respondents indicated that the group they travelled with included persons with serious health conditions or specific needs. Seventy-six per cent of respondents reported that no one in their group had a serious health condition.

Sixty-five per cent of those traveling in a group were traveling with at least one person with a chronic disease or serious medical condition. Among these respondents,

26 per cent were traveling with someone who had a visual impairment, and 15 per cent were traveling with individuals who had difficulty walking or climbing stairs. Other respondents mentioned traveling with people who faced difficulties with self-care (6%), as well as pregnant and lactating women (6%), and wounded or injured persons (6%).

Figure 15: Persons with serious health conditions in travel group (%), (N=144) (multiple answers possible)



8. Methodology

Background

This report is based on a survey of displacement patterns, needs and intentions conducted by IOM's Displacement Tracking Matrix (DTM) in the 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. This report is based on data collected between July and September 2023.

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 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 based on a simple random sample methodology, and selected at entry, exit and transit points, as well as 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. All enumerators reviewed

the data for systematic issues with responses and did not identify any errors. This report only included fully complete surveys in the analysis.

Country-level implementation and limitations

DTM has been active in Estonia since March 2023. This report is based on data collected between 18 July and 7 September 2023. Overall, 604 valid surveys were collected by a team of 5 enumerators (3 female and 2 male) covering 5 different provinces.

Fifty-six per cent of surveys were collected in Harju, 32 per cent in Tartu, eleven per cent in Ida-Viru, and less than one per cent in Pärnu, and Valga regions. Enumerators approached respondents dormitories, and humanitarian aid distribution centers. The interviews have been conducted in Russian and Ukrainian.

The survey respondents were randomly selected at transit and reception locations that receive high volumes of individuals entering Estonia via public or private transport. Another limitation is that not all survey locations are equally accessible to enumerators. Depending on the survey site, individuals may not be able to comfortably spend 10-20 minutes responding to the questionnaire. While the results are not representative, the data shows strong internal consistency with data collected within the country and at the regional level.

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.