

ESTONIA

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



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April - June 2023
Country Report & Data Analysis

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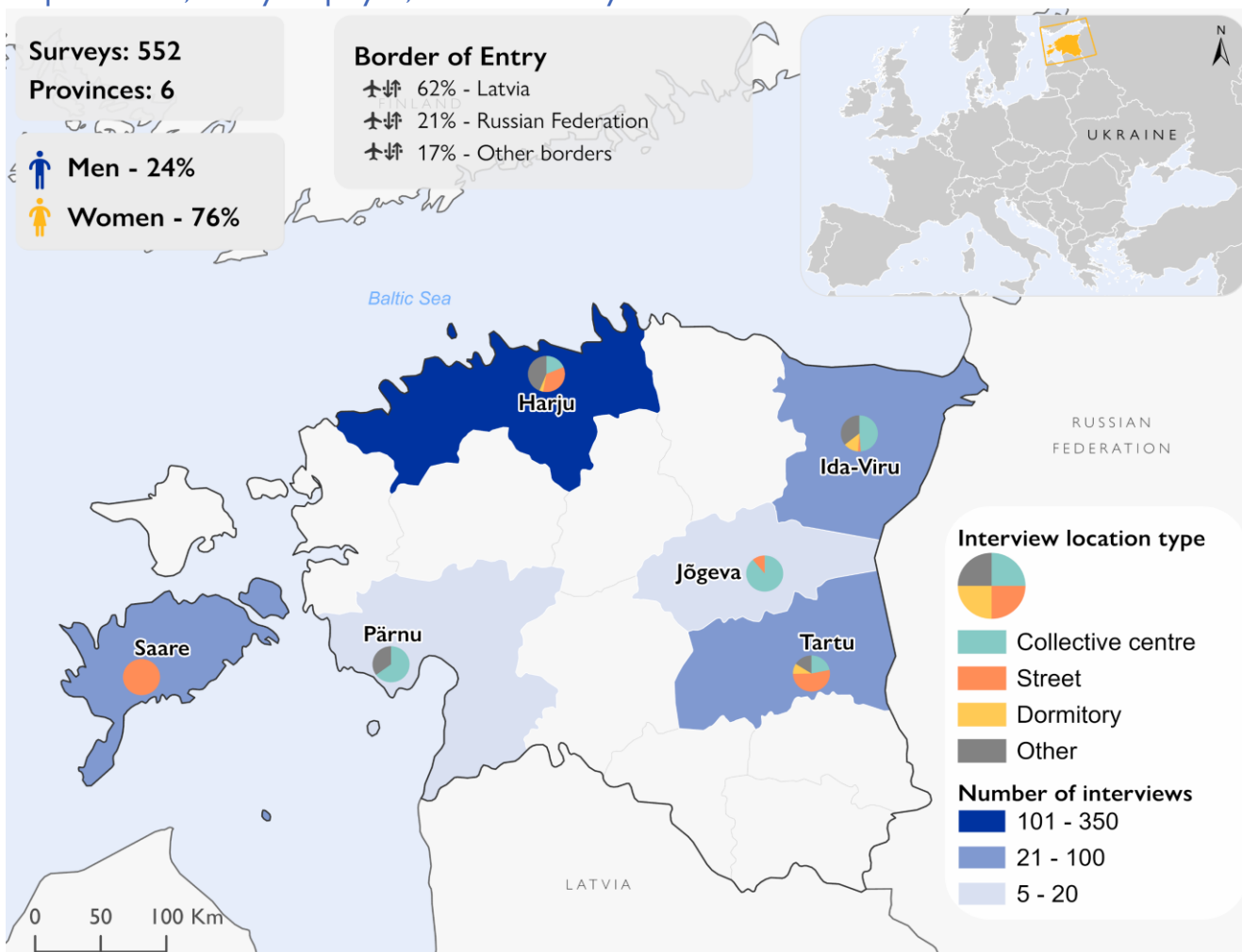
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KEY FINDINGS

- **Top oblasts of origin:** Kharkivska (14%), Donetsk (12%), the city of Kyiv (9%), Khersonska (8%).
- **Intentions to move:** no intention to move (88%), move to place of origin in Ukraine (3%), to another country (3%), where Top 3 were Germany, Czechia and Norway.
- **Employment status:** employed (46%), unemployed and looking for a job (22%), student (14%), retired (6%), on a maternity/paternity leave (5%).
- **Top needs:*** employment (20%), health services (17%), financial support (16%), documentation and registration (12%).
- **Top inclusion challenges:*** language barrier (33%), employment (24%), housing (14%), accessing social services (9%).
- **Top areas of assistance received:*** free transportation (84%), food items (71%), financial support (66%), long-term accommodation (34%).

* more than one answer possible

Map 1: Estonia, surveys deployed, countries of stay & oblasts of destination in Ukraine



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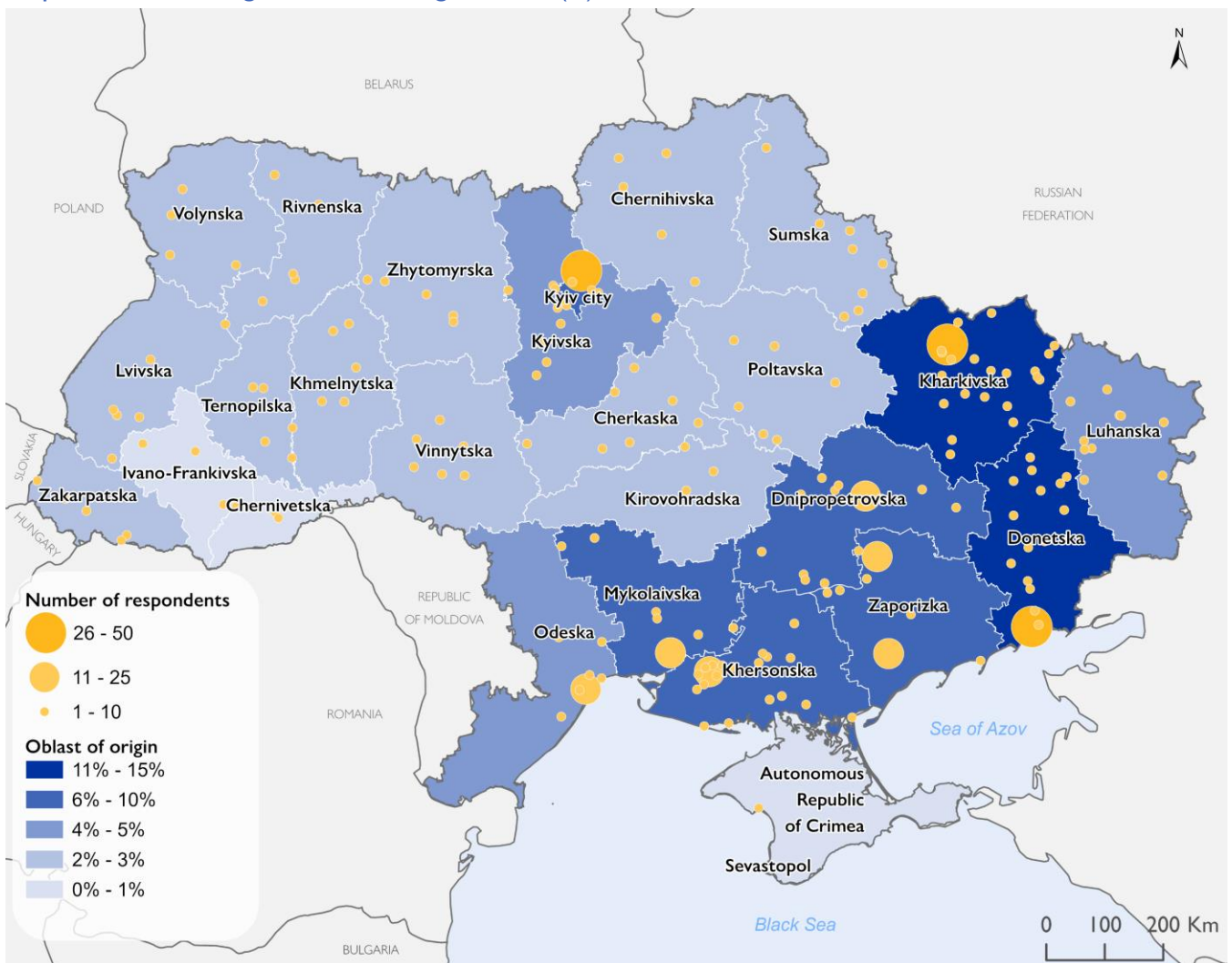
I. Socio-Demographic profile

Oblast (region) of origin

The majority came from the eastern and southern parts of the country, with the highest share of respondents coming from Kharkivska (14%), Donetsk (12%), the city of Kyiv (9%), Khersonska (8%), Zaporizka (7%). The remaining half of the respondents (50%) resided in other 21 regions throughout Ukraine. These included

Dnipropetrovska (6%), Kyivska, Mykolaivska (5% each), Odeska, Luhanska (4% each), Poltavska, Sumska, Vinnytska (3% each), Cherkaska, Chernihivska, Kirovohradska, Lvivska, Rivnenska, Zhytomyrska (2% each), Chernivetska, Ivano-Frankivska, Khmelnytska, Ternopilska, Volynska, Zakarpatska (1% each).

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



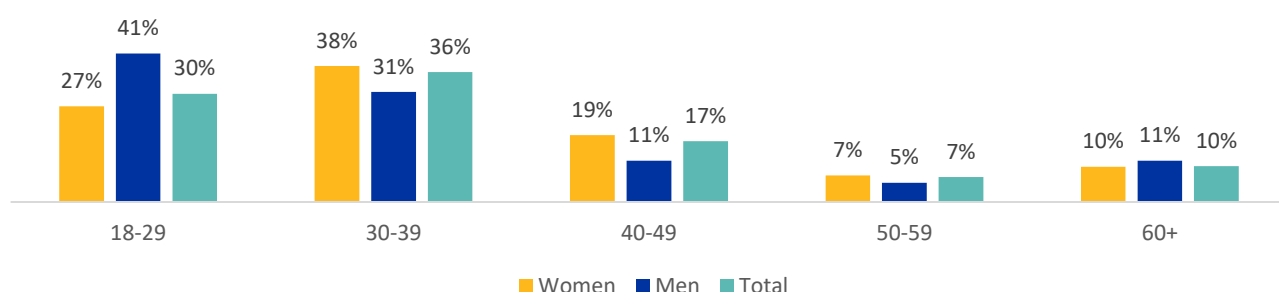
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Gender and age

Seventy-six per cent of the respondents were women, while men were 24 per cent. Over one-third of respondents were between 30 and 39 (36%), followed by those between 18 and 29 (30%), 40 and 49 years (17%). When looking at data disaggregated by gender, the average age for women (38) in the sample

was slightly higher than the men's (35). The largest age group for women was of those between 30 and 39 years old (38%), followed by those aged between 18 and 29 (27%). Among men, the largest groups were aged between 18 and 29 years (41%), followed by those aged between 30 and 39 (31%).

Figure 1: Age by gender and total (%)

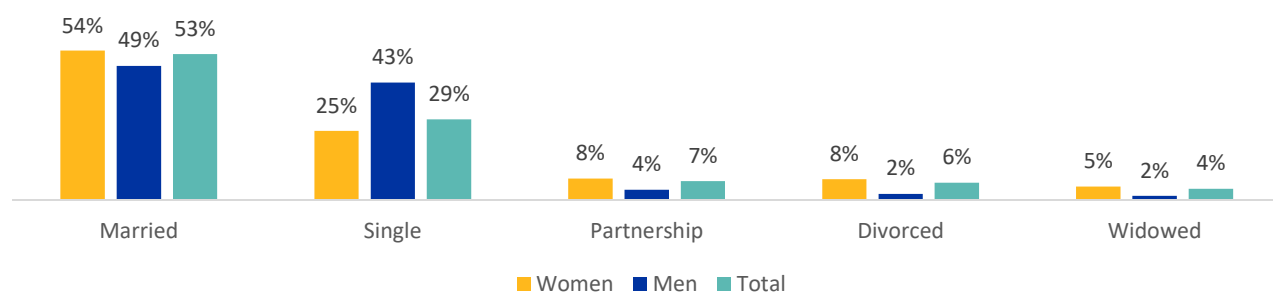


Marital status

More than half (53%) of the respondents were married, while another 29 per cent were single. Thirteen per cent were in a partnership and divorced (7% and 6% respectively). The remaining four per cent of respondents were widowed.

The share of single persons was higher among men than among women (43% versus 25%). On the other hand, women were more likely to be divorced than men (8% versus 2%). Additionally, women were twice as likely to be widowed than men (5% versus 2%).

Figure 2: Marital status (%)

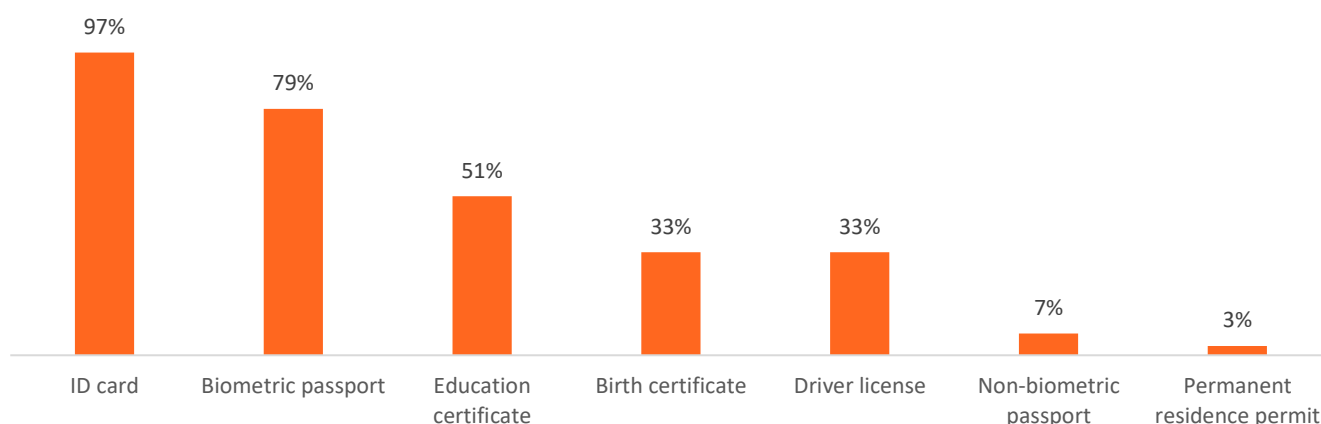


Documents possessed at the time of interview

The majority of respondents travelled with more than one document. Almost all of the respondents (97%) travelled with their ID card, 79 per cent were in possession of their biometric passport, 51 per cent had an education certificate. Other frequently carried

documents were the birth certificate and driver's license (33% each). A smaller group of respondents travelled with a non-biometric passport (7%). The remaining three per cent declared having a permanent residence permit.

Figure 3: Documents in possession of respondents at the time of interview (%)
(more than one answer possible)



Average time 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 of 2022.

This means that by the time the interview was conducted (April-May 2023), they had more than a year in displacement. Another nine per cent of respondents were displaced in April 2022, giving

them around 13 months since their initial date of displacement at the date of assessment.

Between May and December 2022, the rate of displacement fluctuated between one to nine per cent, except in August when the percentage of people leaving the country reached nine per cent. This means that 32 per cent of respondents had spent 5-12 months in displacement at the time of assessment.

Lastly, nine per cent of respondents who were initially displaced in 2023 spent from less than one month to five months in displacement.

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

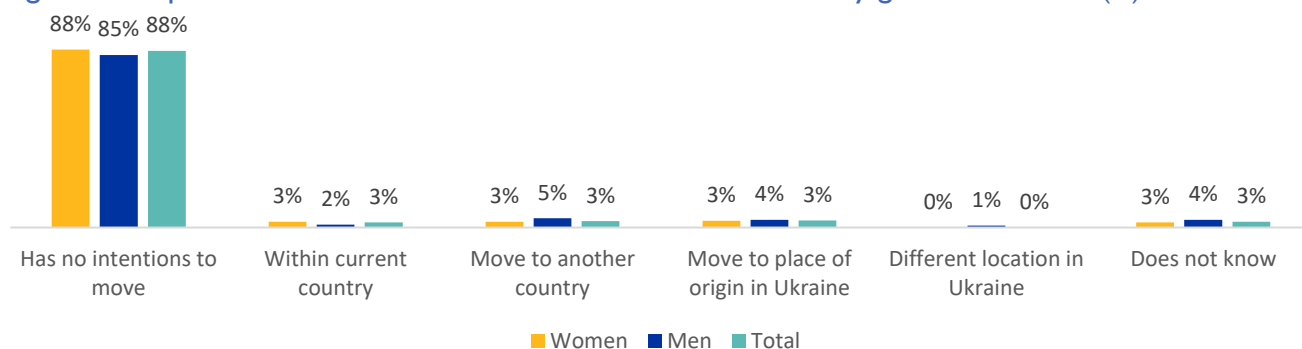
Date of initial displacement	Approximate time in displacement until date of interview	(%) Of Respondents
Before 2022	2 years or more	8%
Jan-Mar 2022	14-16 months	42%
Apr-Jun 2022	11-13 months	20%
Jul-Sept 2022	8-10 months	17%
Oct-Dec 2022	5-7 months	5%
Jan-Mar 2023	2-4 months	6%
Apr-23	1-2 months	1%
May-23	Around a month or less	2%

2. Intentions

Intention to move elsewhere or stay in current location

Ninety-one per cent of respondents interviewed declared their intention to remain in Estonia and three per cent of the respondents either in their current location (88%) or a different location in Estonia (3%) in the near future. Three per cent intended to return to their place of origin in Ukraine, while another three per cent planned to move to another country. Less than one per cent expressed an intention to relocate to a foreign country was higher than that of women (5% versus 3%).

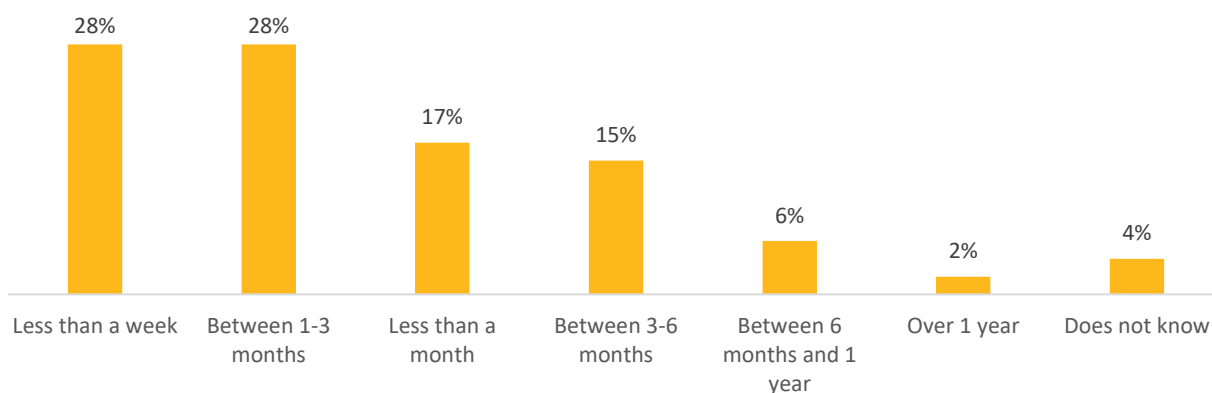
Figure 4: Respondents' intention to move from current location, by gender and total (%)



Intended length of stay in current location

Out of those intending to move within Estonia, Ukraine or elsewhere (N=53), fifty-six per cent intended to stay either less than a week and between one to three months (28% each) in their current location before moving. Another 17 per cent of respondents planned to stay for less than one month, 15 per cent between three to six months, six per cent between six months to one year. Moreover, two per cent of respondents planned to stay in their current location for over one year. Lastly, four per cent did not know 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=21), 86 per cent planned to go back to the same oblast of origin, while the remaining 14 per cent aimed to relocate to a different oblast, specifically Kharkivska and the city of Kiyv (1 respondent each).

Out of those intending to go back to Ukraine, either to the same oblast of origin (N=19), or to an alternative oblast (N=2), 43 per cent indicated that they selected Ukraine as their intended destination with the purpose of reuniting with their family. An additional 19 per cent of respondents planned to return due to lack of

shelter in their country of displacement.

Meanwhile, 50 per cent of respondents had intentions to return to Ukraine for other various reasons: dealing with resource and employment related difficulties (10% each), due to the improved situation in both Ukraine and their original place of residence, for shopping abroad, found work in Ukraine, planned to collect personal belongings or to check on property (5% each).

The remaining 19 per cent of respondents indicated other reasons, such as returning for studies or recovering from sickness.

Figure 6: Reasons for choosing Ukraine as intended destination, total (N=21) (%) (more than one answer possible)



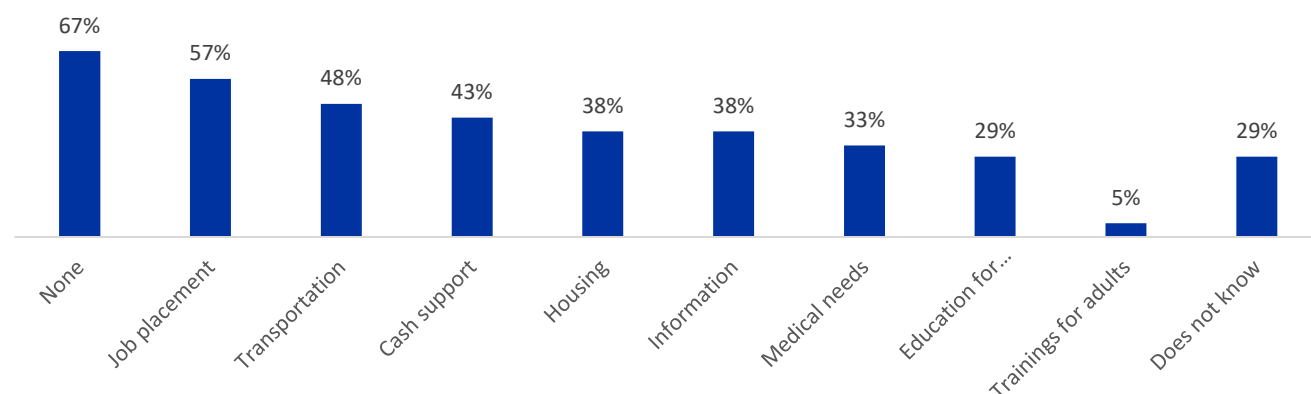
Immediate needs upon return

Out of those respondents who intended to return to Ukraine, either to their oblast of origin or to another location in Ukraine (N=21), 57 per cent indicated they would need job placement upon return.

Additionally, forty-eight per cent indicated they would need help with transportation, 43 per cent

needed cash support. This was followed by housing and information (38% each), medical needs (33%), education for children (29%), and training for adults (5%). 29 per cent of interviewees indicated uncertainty about their needs, while 67 per cent reported having no specific needs upon their return.

Figure 7: Main needs upon return (N=21) (%) (more than one answer possible)



Intended country of destination

Among those individuals who expressed their intention to go to another country as their final destination (N=18), 33 per cent were planning to go to Germany. Additionally, Czechia and Norway

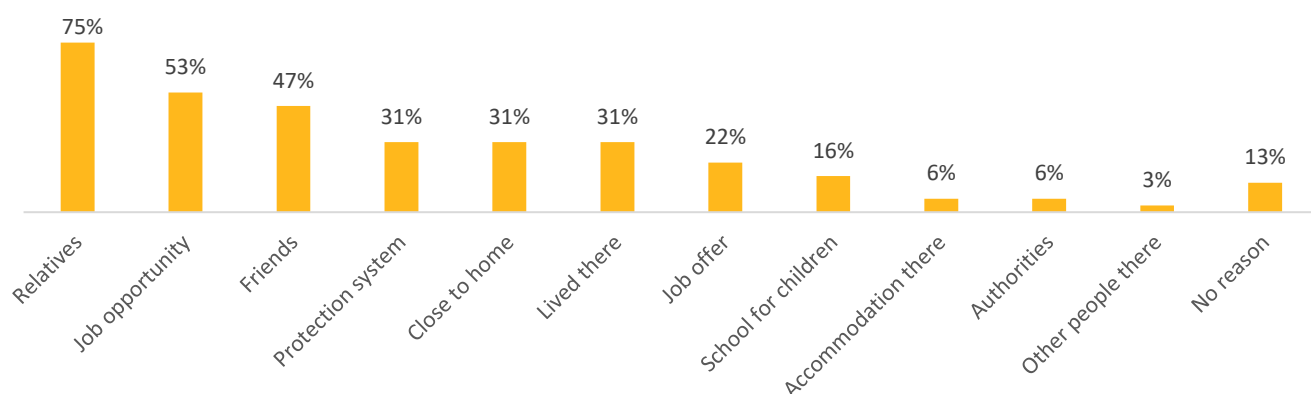
were chosen by eleven per cent of respondents each. Others expressed their desire to go to Finland, Israel, Italy, Lithuania, Poland, Switzerland, Netherlands or Liechtenstein with six per cent each.

Reasons for selecting elsewhere in Estonia or other countries of destination

Among those who intended to relocate either within Estonia (N=14) or to another country (N=18), 75 per cent considered having relatives there as a significant factor in their decision. Additionally, 53 per cent intended to relocate due to job opportunities, while 47 per cent mentioned having friends in the area, the desire to be close to home or because they lived there

(31% each). Furthermore, other factors influencing the decision to relocate included a job offer (22%), the availability of schools for children (16%), having suitable accommodation or due to the authorities (6% each). Some respondents mentioned other people being present in the area (3%). The remaining 12 per cent of respondents stated their intention to relocate without providing a specific reason.

Figure 8: Reasons for choosing elsewhere in Estonia or another country as intended destination (N=32) (%) (more than one answer possible)



3. Education and Employment: profile and prospects

Main spoken language

The survey found that a majority of respondents (57%) speak Ukrainian as their main language at home, while the second most common language used in this round of surveying was Russian (43%).

Other spoken language(s)

A large part of respondents speak Russian (55%) and English (46%) as a second language. This was followed by Ukrainian (43%), Estonian (24%). French, German, Polish (2% each), Spanish and Turkish (1% each) were less commonly spoken languages.

Estonian language proficiency and courses

Out of 345 respondents who provided their answers, 60 per cent had taken Estonian language courses, while 40 per cent had not. The majority of those who participated in the courses (82%), had reached the A1 level, indicating a basic proficiency in the language. Around 16 per cent had achieved the A2 level, while one per cent had progressed to the B1 level, indicating a higher level of proficiency. The remaining respondents indicated reaching the B2 and C1 levels, each accounting for less than one per cent.

Estonian language courses were provided free of charge, while only one per cent had to pay for their language courses. In addition, 69 per cent reported that the language courses were offered by Estonian migration authorities, while 16 per cent told that the courses were provided by the Unemployment Insurance Fund. Three per cent received language courses from their employers, and four per cent mentioned that they pursued language learning independently. The remaining eight per cent mentioned other sources, such as universities or volunteers, as providers of Estonian language courses.

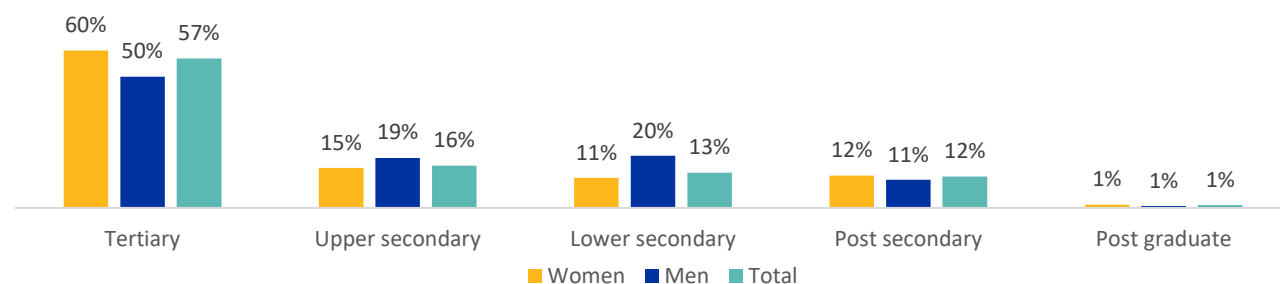
99 per cent of interviewees indicated that the

Education level

More than half of refugees from Ukraine (57%) had completed a tertiary education. Twenty-nine per cent had an upper secondary/vocational or lower secondary (16% and 13% respectively) level of education. 12 per cent claimed to have a post-secondary non-tertiary level of education, while the remaining one per cent had postgraduate

education. Female respondents were more likely than their male counterparts to have reached tertiary education as their highest education level (60% versus 50%), while male respondents were slightly more likely than female respondents to have reached an upper secondary/vocational as their highest education level (19% versus 15%).

Figure 9: Education level, by gender and total (%)

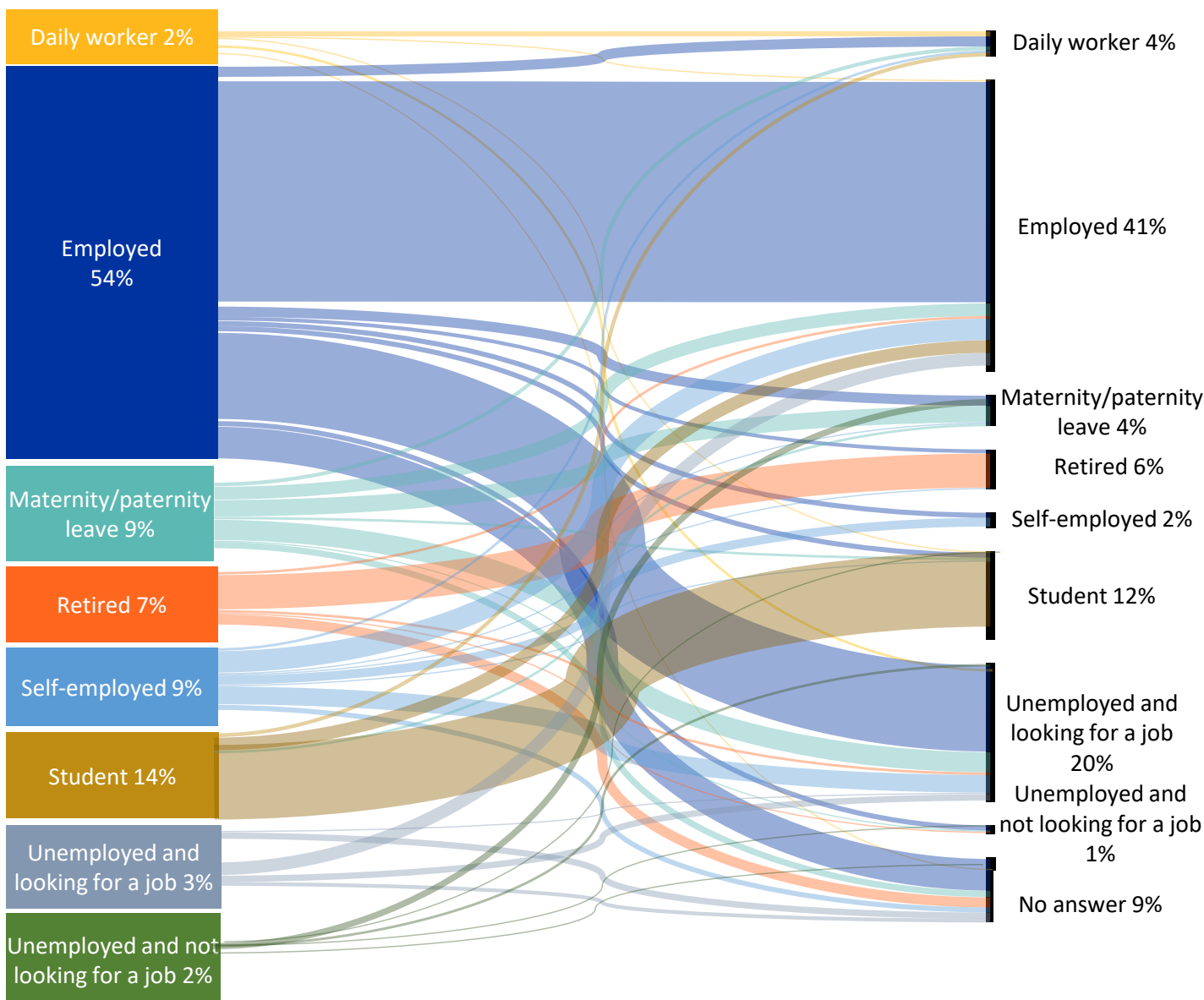


Employment status before leaving Ukraine versus current status

More than a half of all respondents (54%) were employed before leaving Ukraine, 14 per cent were pursuing their studies, nine per cent were on maternity/paternity leave. Additionally, nine per cent were self-employed, seven per cent were retired, three per cent were unemployed and looking for a job, two per cent were unemployed and not looking for a job and another two per cent were daily workers. However, these numbers

were noticeably different when asked about their current employment in Estonia. 22 per cent declared being unemployed and looking for a job, while the share of employed and self-employed decreased to 46 per cent and two 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 22 per cent while in Estonia.

Figure 10: Employment status before leaving Ukraine and current employment status (%)



Sector of employment before leaving Ukraine and now

When comparing the sector of employment of the respondents before leaving Ukraine (N=354) and those respondents who were employed at the time of the interview (N=261), it can be observed that although the proportion in some sectors did not change, there were significant changes in other sectors. For instance, in the financial insurance sector, nine per cent of the respondents were employed before leaving Ukraine, compared to the current two per cent. On the other hand, the proportion of persons employed in construction and manufacturing grew. Additionally, in the accommodation and food services sector, this proportion doubled compared to the time before they left Ukraine.

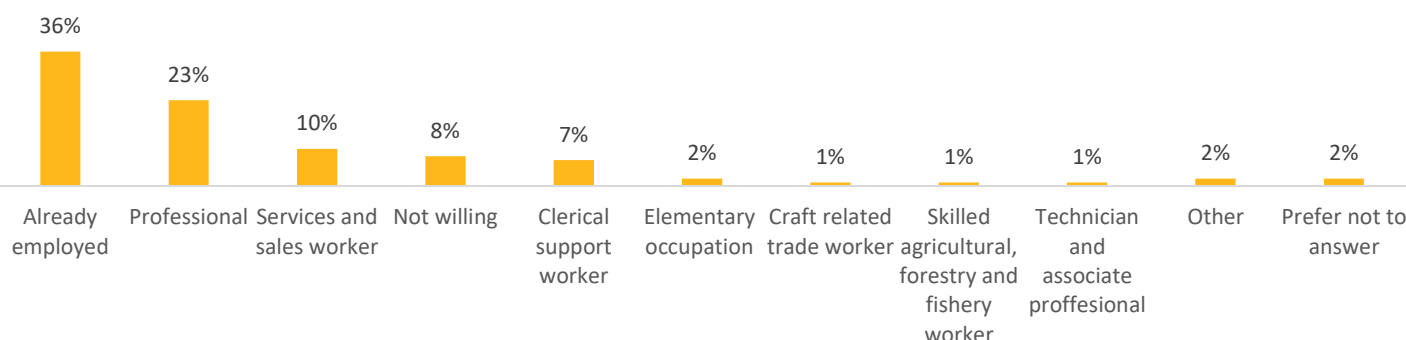
Table 2: Top 12 sectors of employment before leaving Ukraine and currently (%)

Sector of employment	Before leaving Ukraine (%) N=354	Currently (%) N=261
Wholesale, retail and repair	14%	13%
Manufacturing	11%	14%
Education	9%	7%
Financial insurance	9%	2%
Information & Communication	8%	10%
Human health & Social work	6%	4%
Construction	5%	9%
Administrative support	5%	2%
Other services / Activities	5%	16%
Agriculture	4%	4%
Accommodation & Food services	4%	8%
Arts, Entertainment & Recreation	3%	4%

Desired occupations

When asked about their desired occupations in Estonia, respondents provided a variety of preferences. Among them, 36 per cent indicated that they are already employed in their desired occupation. Additionally, 23 per cent expressed their interest in working as professionals, while ten per cent aimed to work in services and sales roles. Additionally, seven per cent of the respondents desired clerical support work, while two per cent aspired to elementary occupations. Others showed an interest in craft-related work, skilled agricultural, forestry, and fishery work, as well as technician and associate professional roles (1% each). Eight per cent of respondents indicated that they were not willing to work. The remaining four per cent either preferred not to answer or desired to work in other professions (2% each).

Figure 11: Desired occupations (%)



4. Registration and inclusion services

Protection applications

Out of the 552 respondents, 88 per cent applied for asylum or temporary protection, while 12 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 (29% versus 7%).

Among those who answered “No” (N=66), 68 per cent claimed to be ineligible for temporary protection status, 18 per cent were planning to leave Estonia soon, while eight per cent declared wanting to register in the future. Two per cent of respondents stated they did not know how to apply for asylum or temporary protection, and the remaining five per cent had other reasons.

In addition, 94 per cent of the respondents registered their place of stay with Estonian authorities, while six per cent did not.

Figure 12: Reasons for not applying for any protection/refugee status (N=66) (%)



Access to finances

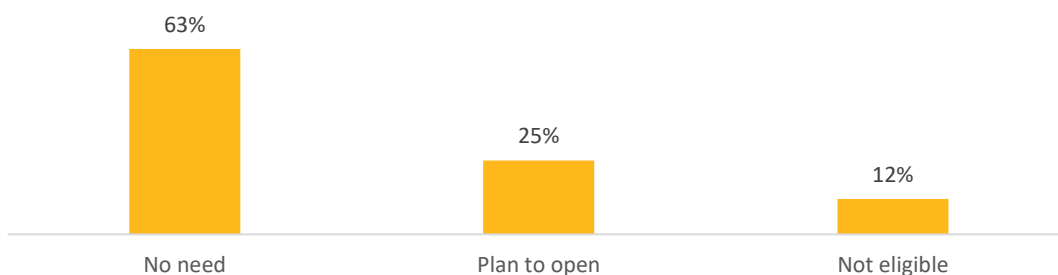
Respondents who have been in Estonia for more than 3 months (or answered they settled in the country) were asked a series of follow-up questions regarding their inclusion. To evaluate the access to finances, we asked them whether they were able to withdraw money using their foreign debit or credit card in Estonia.

Out of 224 respondents who provided answers, 57 per cent had no issues accessing their finances using foreign cards, while 43 per cent of respondents were not able to withdraw cash

from ATM or make payments using their own debit/credit card.

Ninety-eight per cent of respondents had a personal bank account in Estonia at the time of the interview, while two per cent did not. Out of those indicated that they had not opened a personal bank account in Estonia (N=8), 63 per cent had no need to do so, 25 per cent were planning to open it and the remaining 12 per cent were not eligible for opening a personal bank account.

Figure 13: Reasons for not opening a personal bank account in Estonia (N=8) (%)



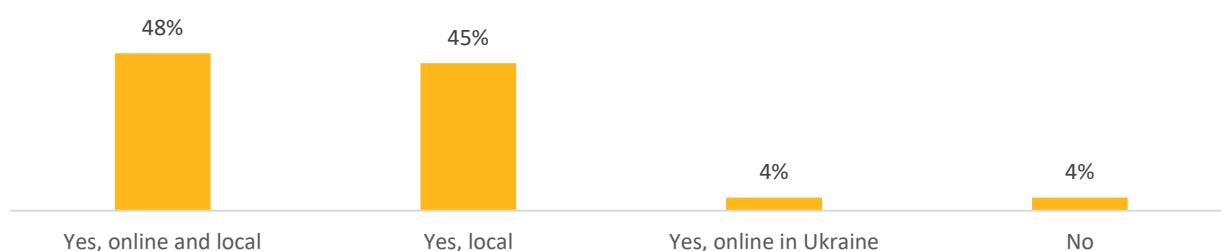
Access to education

Out of the respondents who had children, 212 specified if they were enrolled or not in schools and kindergartens. 48 per cent indicated they were able to enroll their children in both online and local schools, while 45 per cent had children enrolled and attending local schools. Moreover, four per cent indicated that they had been able to enroll their children in online education in

Ukraine. The remaining four 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=5), 80 per cent were planning to enroll and the remaining 20 per cent had other non-specified reasons.

Figure 14: Has enrolled children in an education facility (N=212) (%)



Consular services

Seventy-three per cent of respondents indicated that they knew how to contact a consular representative, while 27 per cent did not. Out of those who responded to the previous question (N=393), 85 per cent indicated that they had not reached out for consular support at the time of the assessment, while another 15 per cent had.

Figure 15: Knows how to contact consular representative (%)

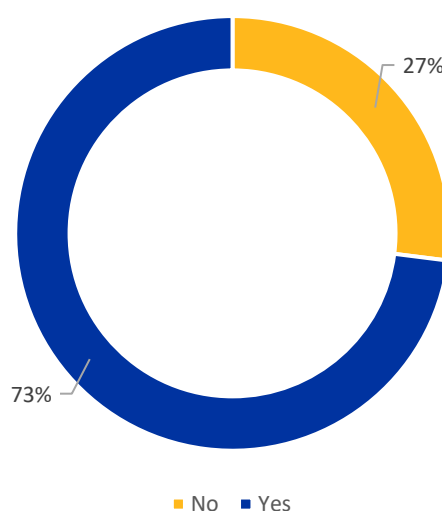
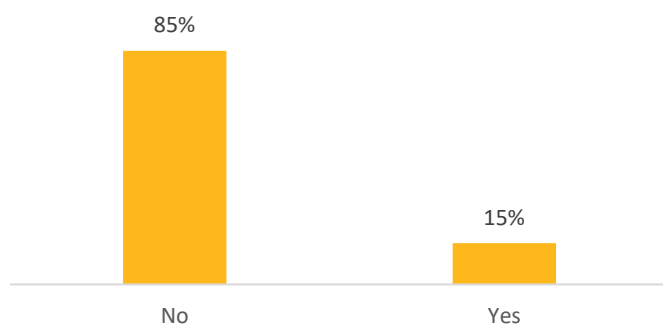


Figure 16: Has reached out for consular support in Estonia (N=393) (%)



5. Immediate Needs and Assistance Received

Immediate needs

The three primary needs expressed by the respondents were employment (20%), health services (17%), and financial support (16%). This was followed by the need for support for documentation and registration (12%), long-term accommodation (8%), language courses and food products (6% each). Additionally, some respondents expressed a need for support with legal services (5%), medicines (4%), psychological counselling (3%).

Figure 17: Immediate needs (%) (more than one answer possible)



Assistance received in Estonia

Eighty per cent of refugees in the sample reported receiving support or humanitarian assistance, while 20 per cent did not receive any support before the interview. Among those who received support, the main types of assistance reported were transportation (84%), followed by help with food (71%), financial support (66%), long-term accommodation (34%), language courses (27%),

clothes and shoes (27%), personal hygiene and sanitary supplies (23%), employment (10%) toys (7%), psychological counselling (4%), and vouchers (1%).

In addition, a considerable majority of the respondents (80%) indicated that they had completed the national adaptation program, while 20 per cent had not.

Areas in which information is needed to get more assistance

Out of those who indicated that they did not know where to find assistance (5 per cent out of the total sample, N=28), more than a third of respondents indicated that they needed more information either on employment opportunities or health services (36% each).

Additionally, 25 per cent needed more information on language courses, 18 per cent required more information on financial support. Other relevant areas where information was needed included food products, general information, documentation

and registration (14% each), medicines, long-term accommodation, education for adults and psychological counselling (11% each). Moreover, respondents sought information on transportation, legal services and personal hygiene and sanitary supplies (7% each), as well as short-term accommodation and clothes and shoes (4%).

Furthermore, 5 per cent of the respondents (out of N=393) reported facing challenges in accessing the support they needed. Female respondents were twice as likely to encounter such difficulties than males (4% versus 2%).

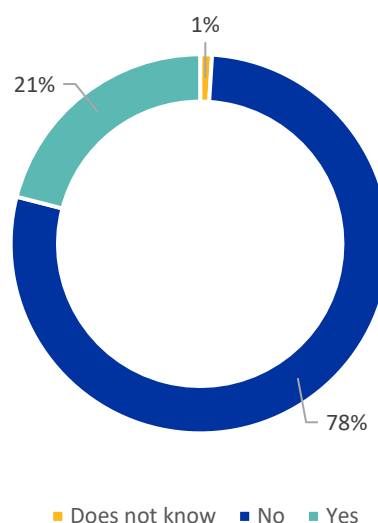
6. Challenges in the country of displacement

Experiences of discrimination

Twenty-one per cent of respondents indicated having experienced discrimination in their country of displacement. In contrast, 78 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 (23% versus 15%).

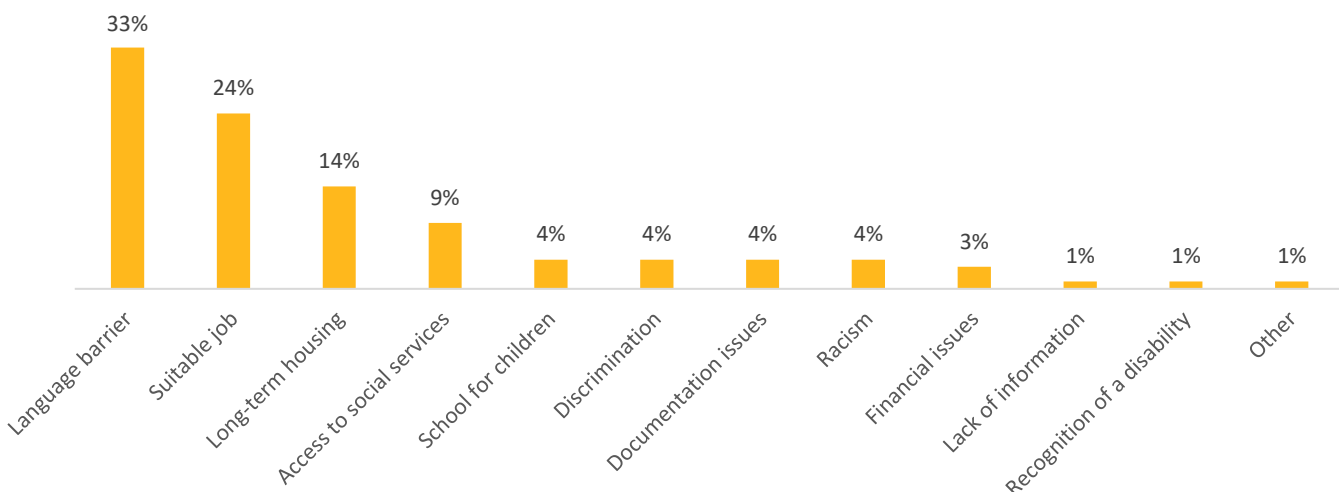
Figure 18: Reported experiences of discrimination (%)



Inclusion challenges

When asked about the challenges they had for children, facing discrimination and racism, encountered in Estonia, respondents and dealing with documentation issues (4%). A indicated facing language barriers (33%), finding smaller percentage of respondents mentioned a suitable job (24%) and securing long-term challenges related to lack of information (2%) housing (14%) as the most prevalent difficulties. and recognition of disabilities (1% each). The Other notable difficulties included accessing remaining one per cent had other non-specified social services (9%), finding schools and preschools difficulties.

Figure 19: Top 12 inclusion challenges, (N=393) (%) (more than one answer possible)



7. Current Group Composition

Travel mode

Seventy-two per cent of the sample declared to be travelling in a group, in comparison with the other 28 per cent who were travelling alone. With a larger number of female participants in the survey compared to men (421 female respondents and 131 male respondents) the data indicates that female respondents were less likely to be travelling alone in comparison to their

male counterparts (24% versus 44%). Out of the 72 per cent travelling in a group, 96 per cent were travelling with immediate family/household members, six per cent with other relatives and three per cent with friends and neighbors. Overall, the average group size including the respondent was about three persons.

Table 2: Travel mode by gender and total

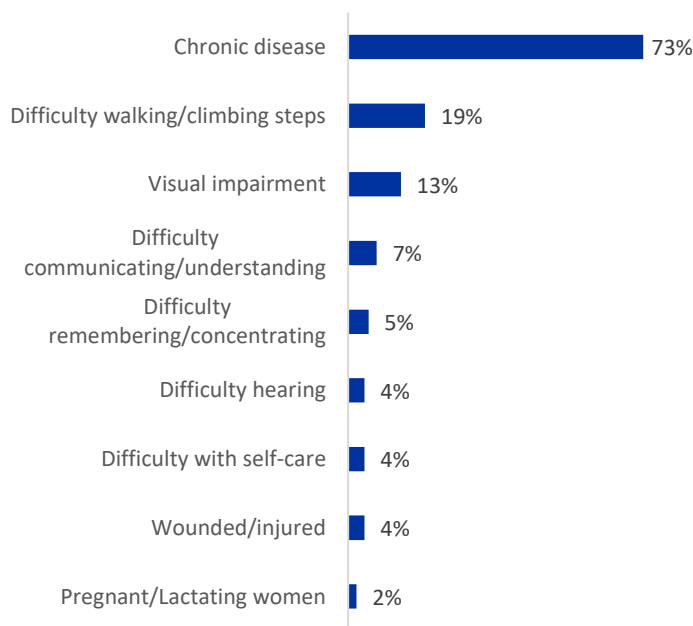
Travelling in a group/alone	Women	Men	Total
Alone	99	58	157
With immediate family/household members	312	69	381
Relatives	18	5	23
Friends and neighbours	11	1	12
Colleagues	0	1	1

Travelling with persons with health conditions and disabilities

A considerable fraction of respondents (19%, N=103) indicated that their group/household included persons with serious health conditions or specific needs, while 81 per cent did not report being in a group with at least one person with a serious health condition.

More specifically, 73 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. Additionally, nineteen per cent were travelling with a person having difficulty walking/climbing steps. This was followed by those with visual impairment (13%), difficulty communicating/understanding (7%), difficulty remembering/concentrating (5%), difficulty hearing or having difficulty with self-care, and wounded/injured persons (4% each). Two per cent reported travelling with pregnant or lactating women.

Figure 20: Respondents traveling with at least one person with a serious health condition (N=103) (%) (more than one answer 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 11 countries included in the Regional Response Plan for Ukraine in 2023: 6 countries neighboring 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 April and June 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 systematic issues by enumerator, and this process did not identify problems. Only fully completed surveys were taken into account for this report. responses were checked for systematic issues by enumerator, and this process did not

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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 1 April and 17 June 2023. Overall, 552 valid surveys were collected by a team of 5 enumerators (3 female and 2 male) deployed in 3 different provinces. Sixty per cent of surveys were collected in Harju, 16 per cent in Tartu, 15 per cent in Ida-Viru, four per cent in Pärnu, another four per cent in Saare and two per cent in Jõgeva 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.

