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UKRAINE RESPONSE

ESTONIA

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

2023 Annual Report

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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

Hobujaama str. 4
Tallinn, Estonia
+372 6 778 700
Website: https://estonia.iom.int/
Contact: iomtallinn@iom.int

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Cover photo: DTM survey with Ukrainian refugee in Narva, Estonia. © IOM 2024

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KEY FINDINGS

Top 5 oblasts* of origin:

- Kharkivska (13%)
- Donetska (11%)
- Khersonska (10%)
- Kyiv city (8%)
- Zaporizka (8%)

* Regions in Ukraine

Needs*:

Language courses (32%)

Financial support (27%)

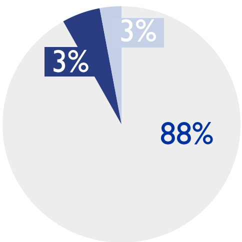
Employment (25%)

Health services (20%)

*Multiple answers possible

Intentions:

- Will not move soon
- To the region of origin in Ukraine
- To another country



Top 3 desired destinations:

- Germany
- Poland
- Norway

Assistance received*:

- Transportation (84%)
- Food (76%)
- Financial (64%)
- Language courses (47%)

*Multiple answers possible

Labour market participation:

81%
Active population

19%
Inactive population

Inclusion challenges*:

42%
Language barrier

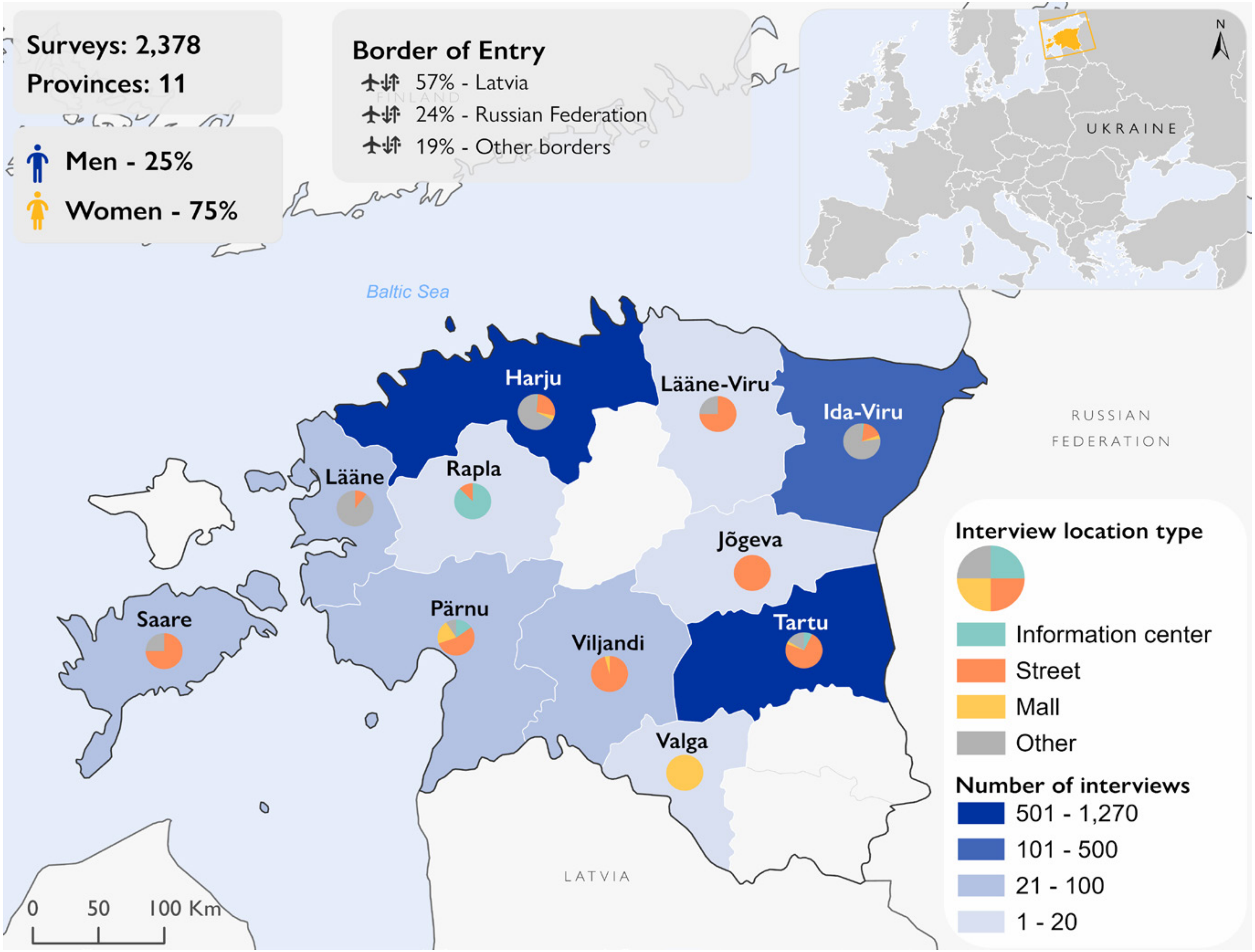
33%
Lack of work

21%
Housing

13%
Financial issues

*Multiple answers possible

Map I: Number of surveys and locations of data collection in Estonia in 2023



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.

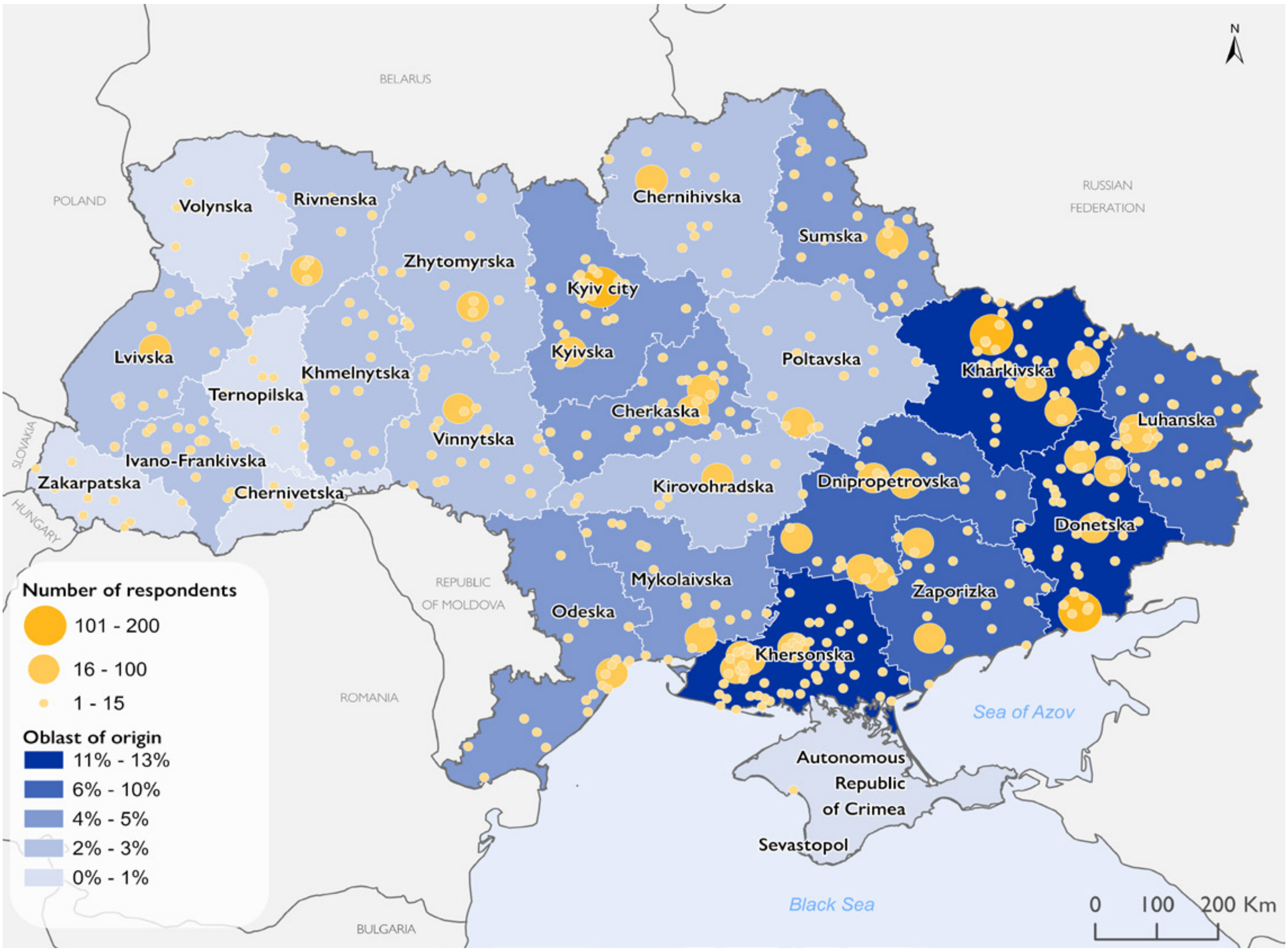
1. Socio-Demographic Profile

Oblast (region) of origin

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 (57%) came from only six regions of origin or habitual residence before leaving Ukraine, namely Kharkivska (13%), Donetska (11%), Khersonska (10%), Kyiv city (8%), Zaporizka (8%), Dnipropetrovska (7%). Other highly represented regions of origin include Luhanska (5%), Mykolaivska (4%), Odeska (4%), Kyivska (4%). The remaining respondents (26%) resided in 14 other regions throughout Ukraine. These included Cherkaska, Sumska, Poltavska (3% each), Chernihivska, Kirovohradska, Vinnytska, Zhytomyrska (2% each), Ivano-Frankivska, Khmelnytska, Lvivska, Rivnenska, Zakarpatska, Volynska (1% each).

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



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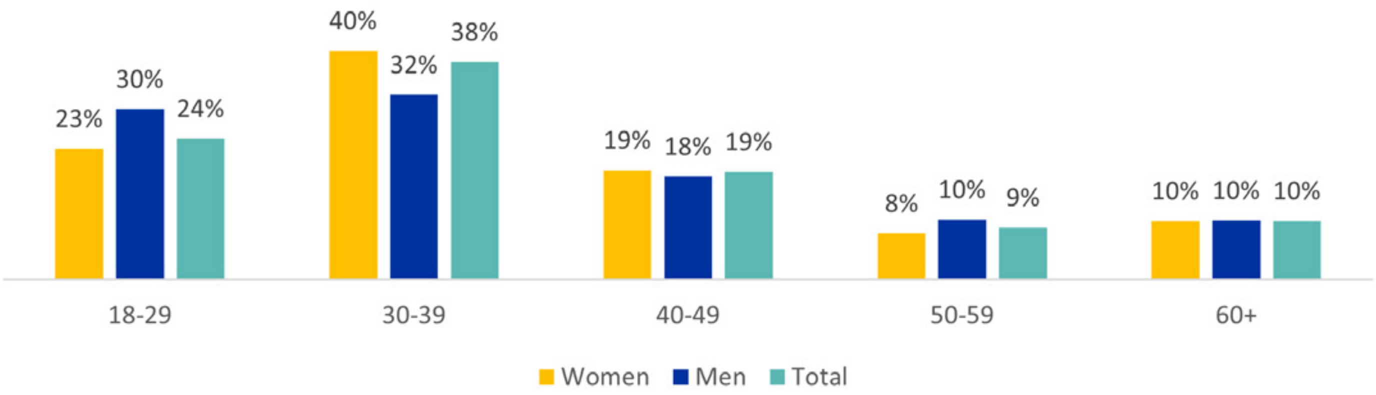
Gender and age

Seventy-five per cent of the respondents were women, while men constituted 25 per cent of the sample. Over one-third of respondents were between 30 and 39 years old (38%), followed by those between 18 and 29 years old (24%), and between 40 and 49 years (19%). The average age of women in the sample (39 years old) was higher than the average age of men (38 years old). Among women, the largest age group represented was 30-39 year olds (40%), followed by 18-29 year olds (23%). Among men, the most represented age group was 30-39 year olds (32%), followed by 18-29 year olds (30%).

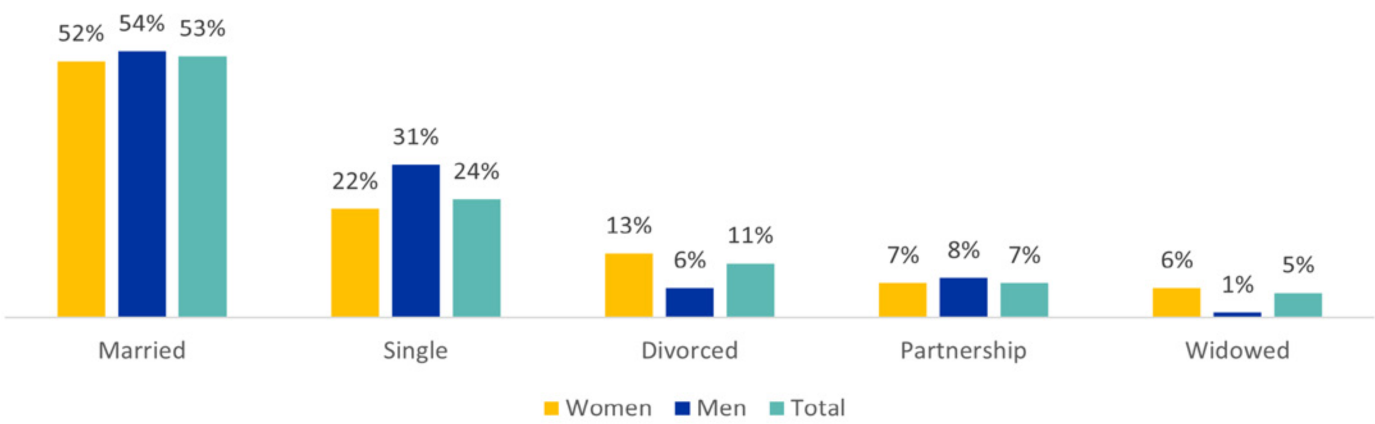
Figure 1: Age by gender and total (%), (N=2,378)



Marital status

Over half of the respondents were married (53%), while another 24 per cent were single. Others were divorced or in a partnership (11% and 7% respectively). The remaining five per cent of respondents were widowed. The share of married respondents was slightly higher among men than women (54% versus 52%), while women were more likely to be widowed than men (6% versus 1%). Conversely, a higher percentage of men reported being single compared to women (31% versus 22%).

Figure 2: Marital status by gender and total (%), (N=2,378)



2. Intentions

Move elsewhere or stay

Ninety per cent of respondents intended to remain in Estonia, either in their current location (88%) or in a different location within the country (2%) in the near future. Three per cent intended to go to another country, while another three 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 (89% versus 87%). Additionally, women were less likely to relocate to a foreign country than men (3% versus 5%).

Fifty per cent of respondents plan to return to Ukraine when it is safe to do so, while fourteen per cent do not intend to return at all. Sixteen per cent intend to return regardless of the situation in the country. The remaining 20 per cent remain unsure about their plans.

Over time, the percentage of respondents intending to return to Ukraine decreased.

In the first half of the year, an average of 53 per cent wanted to return, compared to 48 per cent in the latter half. The number of respondents who were determined to return to Ukraine regardless of the situation decreased significantly, from 27 per cent to twelve per cent. Additionally, the percentage of respondents uncertain about their return plans steadily increased – from six per cent during the initial months of 2023 to 25 per cent in the latter months of the same year.

Figure 3: Respondents' intentions to move (%), (N=2,378)

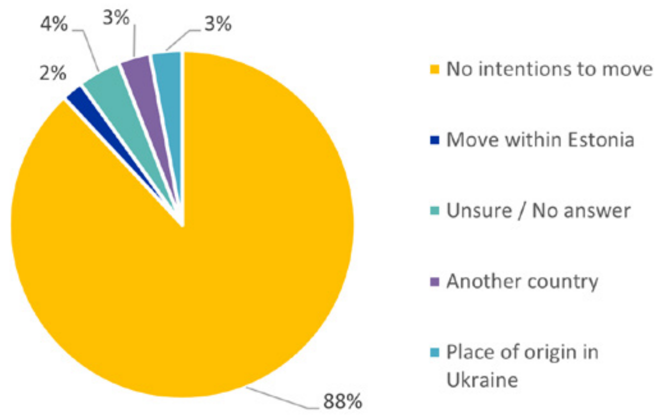
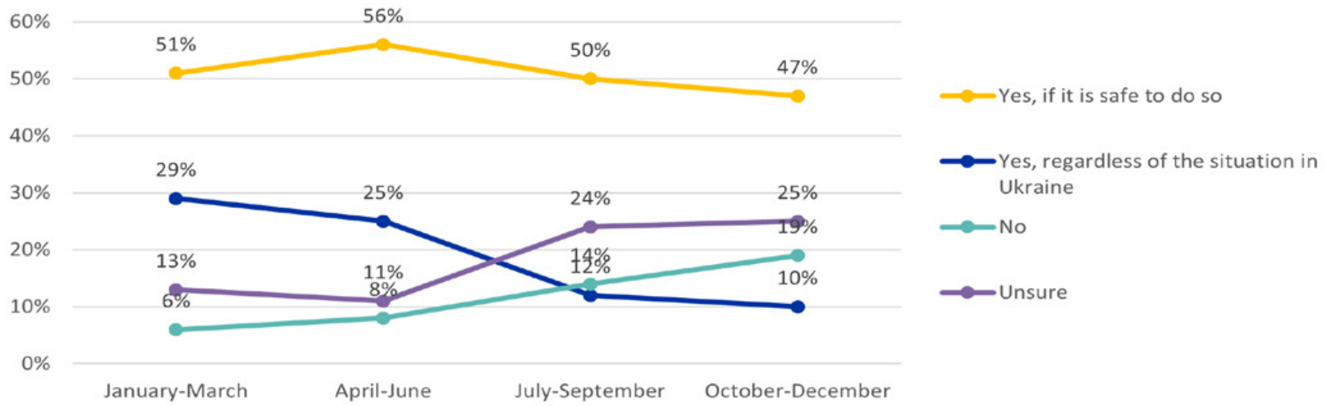


Figure 4: Return plans when safe, 2023 (%), (N=2,378)



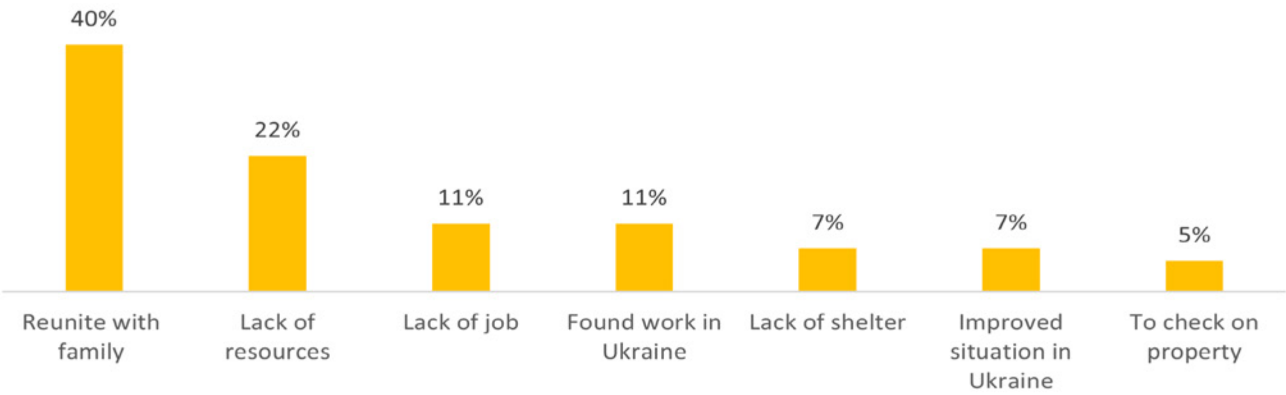
Intended length of stay

Respondents who intended to relocate within Estonia, return to their place of origin in Ukraine, or choose another country (N=169) were asked about their expected duration of stay in their current location. Among these respondents, thirty-nine per cent intended to stay for less than a week, and an additional 17 per cent were aiming for a stay of one to three months. Fourteen per cent aimed to stay for less than one month, while twelve per cent were going to stay for three to six months. Nine per cent were considering a stay of six months to a year, while five per cent intended to stay for more than one year. Five per cent remained uncertain about the duration of their stay.

Intended oblast of destination in Ukraine and reasons to go back

Among respondents intending to return to Ukraine (N=56), all expressed the intention to return to their oblast of origin. Of those intending to return, 40 per cent cited reuniting with family members as their primary purpose, while 22 per cent indicated a return due to a lack of resources in Estonia. Additionally, others cited a lack of job opportunities or finding work in Ukraine (11% each), as well as a lack of shelter or an improved situation in Ukraine (7% each). Five per cent intended to check on their property.

Figure 5: Reasons for choosing Ukraine as intended destination, total (%), (N=56) (multiple answers possible)



Immediate needs upon return

Among the respondents who intended to return to Ukraine (N=56), ten indicated that their primary need would be financial support, while five needed transportation. Other needs included job placement (4 respondents), housing (3 respondents), medical needs, and information (2 respondents each). Additionally, 30 respondents intending to return to Ukraine stated that they did not require any immediate support.

Intended country of destination

Among those who intended to go to another country (N=78), the top two intended destinations were Germany and Poland, with 20 and 14 respondents respectively. Ten respondents intended to move to Norway. Other respondents intended to relocate to Finland (seven respondents), Canada (4 respondents), Lithuania and Czechia (3 respondents each), Switzerland and the Netherlands (2 respondents each), and Croatia, Israel, Italy, Liechtenstein, Portugal, Romania, Spain, and the United States of America (1 respondent each).

Reasons for selecting intended destination

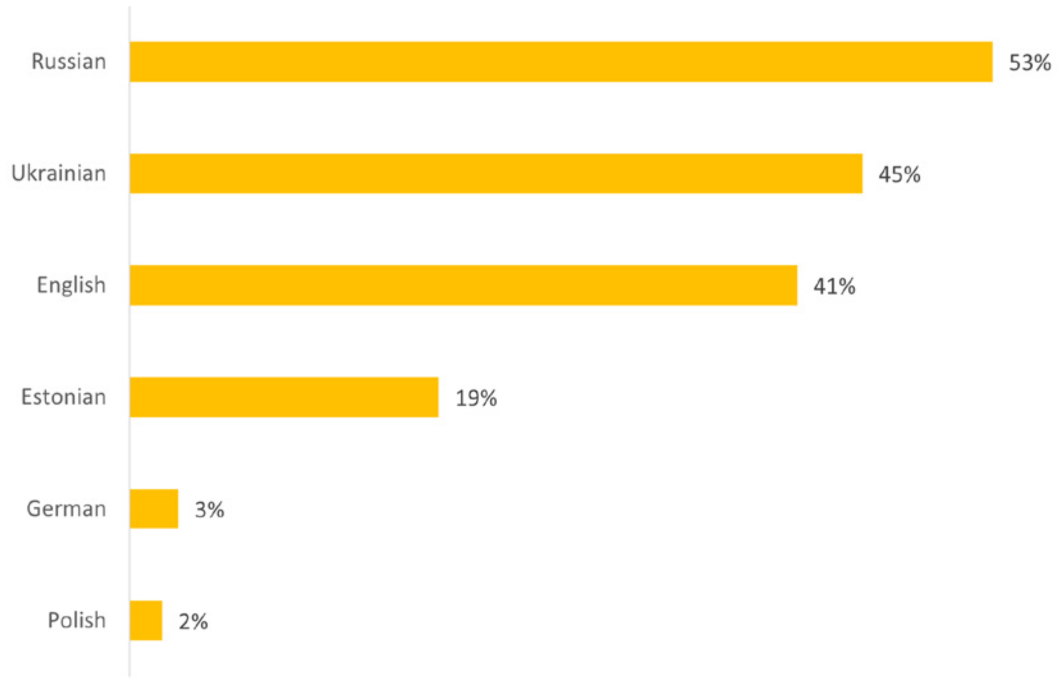
The survey asked respondents who planned to relocate to another country (N=78) to indicate the reasons for selecting their intended destination. Thirty-three per cent cited the presence of friends in the destination country as a significant factor impacting their decision. Additionally, 22 per cent of respondents mentioned that relatives played a crucial role in shaping their choice to relocate to the destination country, while 15 per cent referenced the protection system. Eight per cent mentioned job opportunities in the destination country, while six per cent pointed to the availability of accommodation as a factor affecting their decision. A few respondents mentioned a job offer (4 respondents), schools for children, and other individuals in the destination country, or because they lived there (3 respondents each).

3. Education and employment: profile and prospects

Main language

Over half of respondents (55%) speak Ukrainian as their main language at home, while Russian was the second most common language among respondents (45%). When asked about other languages spoken, 53 per cent of all respondents mentioned Russian and another 45 per cent mentioned Ukrainian. In addition, 41 per cent of respondents spoke English and 19 per cent spoke Estonian. Other mentioned languages included German (3% of respondents) and Polish (2%).

Figure 6: Other spoken languages (%), (N=2,347) (multiple answers possible)



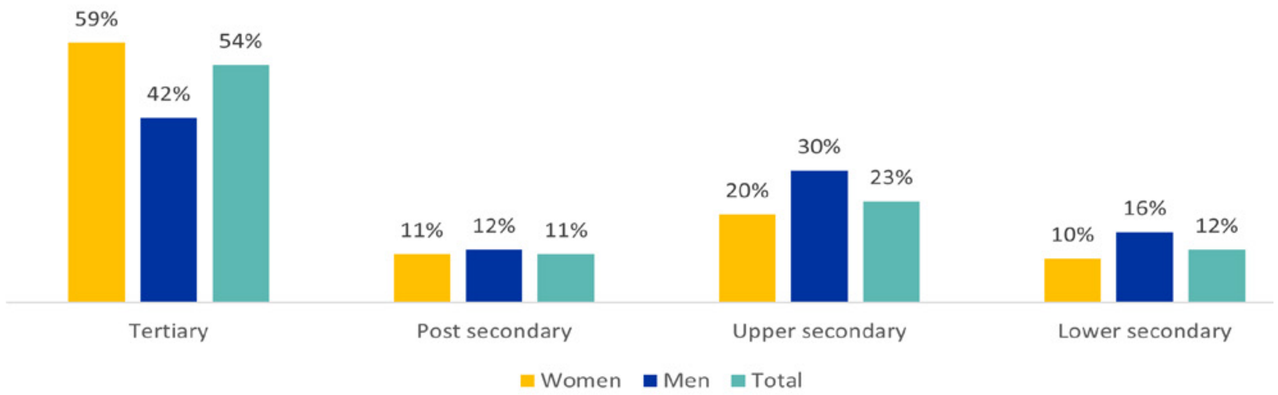
Estonian language proficiency and courses

Out of 1281 respondents who provided their answers, 67 per cent had taken Estonian language courses, while 33 per cent had not. 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. 420 respondents stated that they did not enroll in Estonian language courses. The primary reasons for this were: lack of time (61%), time constraints due to childcare responsibilities (12%), lack of information on where to take the courses (9%), and no necessity to learn Estonian(9%),financial constraints (4%), dissatisfaction with the quality of Estonian language courses (3%) and a lack of interest in learning the Estonian language (2%).

Education level

Over half of respondents (54%) had completed tertiary education. Forty-five per cent had an upper secondary/vocational or lower secondary level of education (23% and 12% respectively). Additionally, 11 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 42%), while men were more likely than women to have reached the upper secondary/vocational level as their highest level of education (30% versus 20%).

Figure 7: Education level, by gender and total (%), (N=2,378)



Employment after displacement

At the time of the interview, 81 per cent of respondents were engaged in the labour force. Meanwhile, 19 per cent of working-age stayers remained inactive. Among active respondents, the highest proportion is observed within the 30-39 age group (44%), whereas the highest percentage of inactive individuals is found in the 18-29 (44%) and the 60 and above (34%) age groups.

Figure 8: Active population by age (%), (N=1,856)

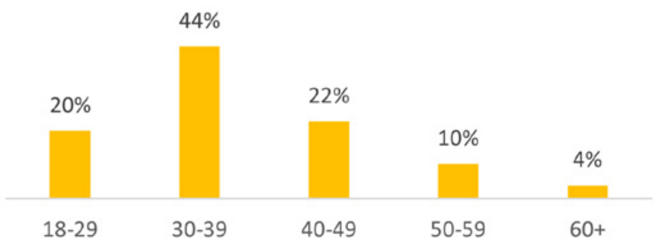
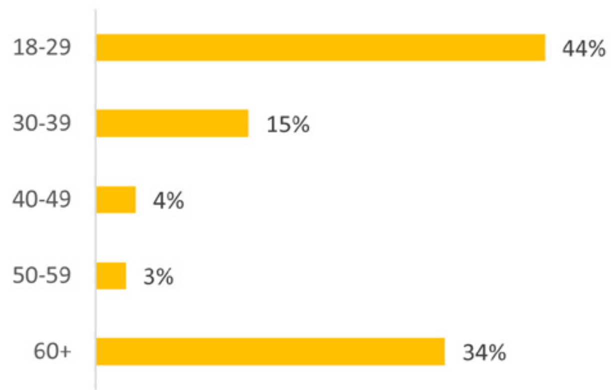


Figure 9: Inactive population by age (%), (N=447)



Within the active population (81%, N=1,856), 58 per cent is in employment, comprising 54 per cent in regular employment, two per cent as daily workers and two per cent self-employed people. The remaining 22 per cent reported being unemployed. Men are more likely to be employed than women (78% versus 63%), while the percentage of self-employed people is higher among women than men (3% versus 1%).

Among the inactive respondents (19%, N=447), reasons for not being part of the labour force included student status (7%), retirement (7%), parental leave (4%), in addition to those not seeking employment (1%).

Employment before displacement

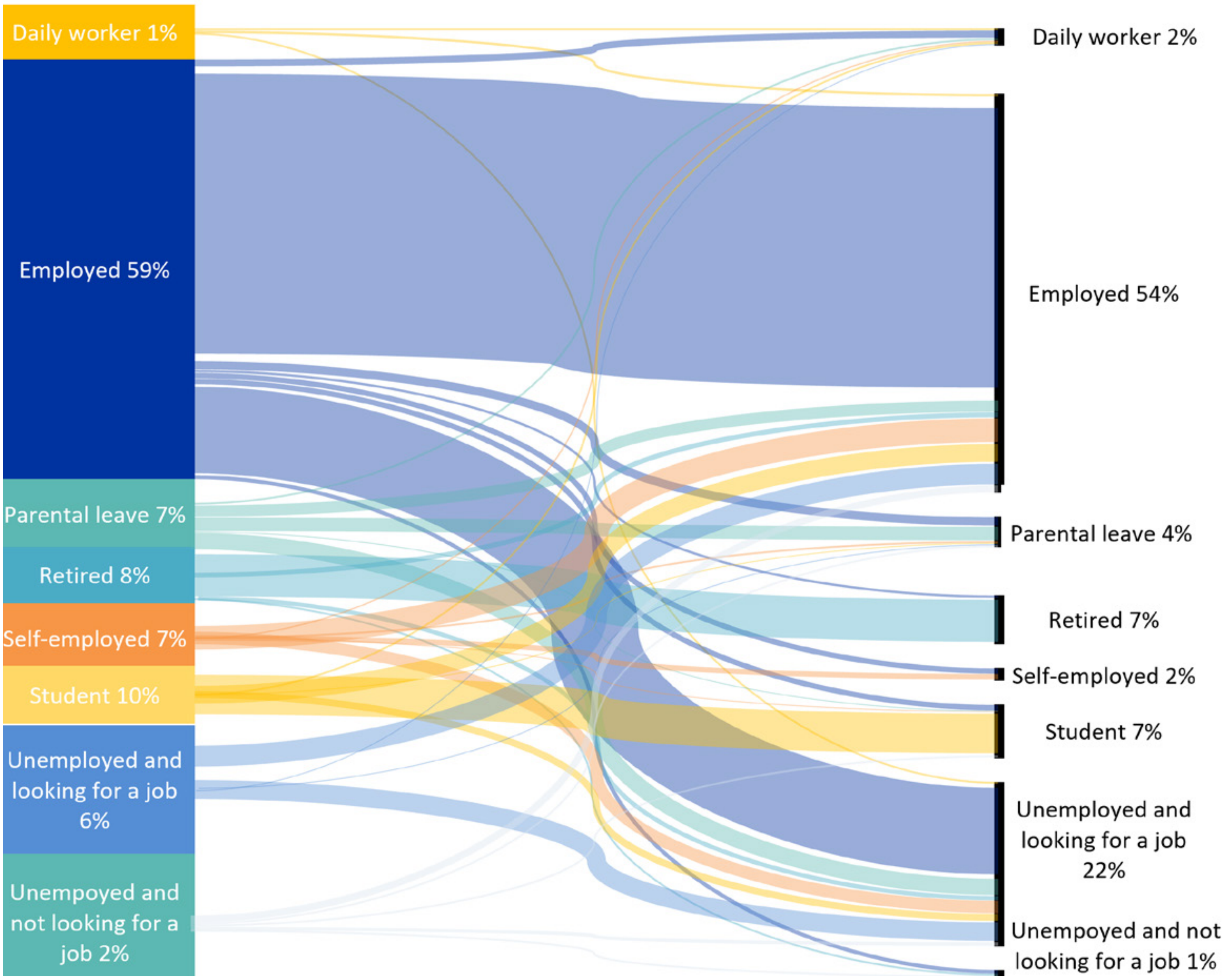
Nearly three-quarters (73%) of respondents were previously actively involved in the labour market before leaving Ukraine, which represents a slightly lower rate compared to the current labour market participation rates in Estonia (81%). The remaining 27 per cent were not part of the labour force.

Among respondents, who were previously part of the labour force (73%, N=1,731), 67 per cent were employed (59% in regular employment, 7% self-employed, 1% daily workers). Six per cent were unemployed before leaving Ukraine. This represents a significant decline in the rate of employment, dropping from 67 per cent per cent to 58 per cent after displacement.

Among the inactive respondents (27%, N=646), reasons for not being part of the labour force included parental leave (7%), retirement (8%), student status (10%), and those not actively seeking employment (2%).

Before displacement, within the active population, women were more likely to be employed than men (93% versus 88%). Also, a greater population of women were involved in regular employment (82% versus 76%). However, a higher percentage of men reported being self-employed (10%) compared to their female counterparts (9%).

Figure 10. Status before and after displacement (%), (N=2,378)



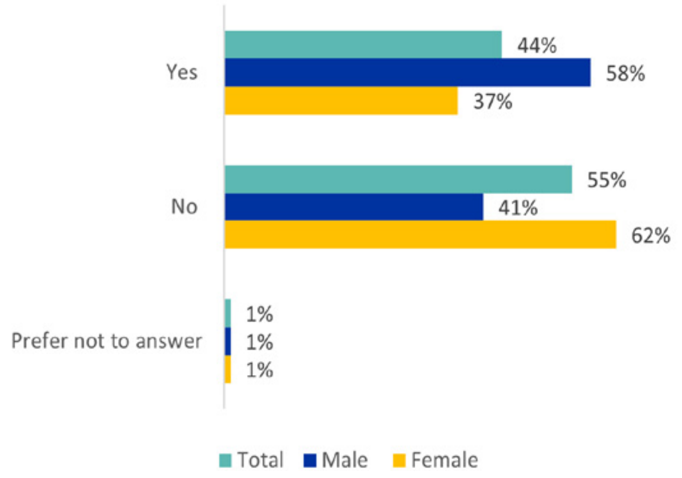
Active in employment

Job matching

Overall, less than half of the respondents (44%) indicate that their current job in Estonia corresponds to their educational background and professional experience. Notably, men exhibited higher satisfaction with job alignment (58%) compared to female respondents (37%).

Among those whose academic and professional background did not align with their current employment, disparities were evident, with a significant proportion having tertiary education (64%), a smaller percentage with upper secondary education (20%), and respondents with post-secondary education accounting for 10 per cent.

Figure 11. Job matching by gender (%), (N=1,027)

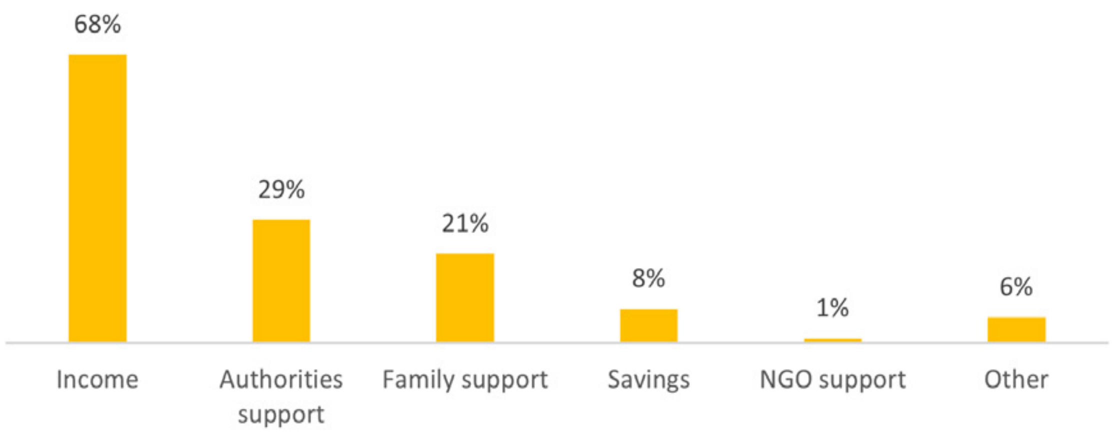


Ability to cover expenses

Ninety-one per cent of respondents reported that their average income was sufficient to cover their monthly expenses in Estonia, while nine per cent reported they did not have sufficient income to cover their expenses. The majority of both active and inactive individuals reported having sufficient income to cover their monthly expenses (92% and 90% respectively).

Among respondents who answered the question regarding the means they use to pay for their daily expenses (N=1,772), the majority mentioned income from work (68%). Twenty-nine per cent mentioned support from authorities or the government, 21 per cent received support from their family and relatives, and eight per cent relied on their own savings. One per cent of respondents received support from NGOs and humanitarian organizations.

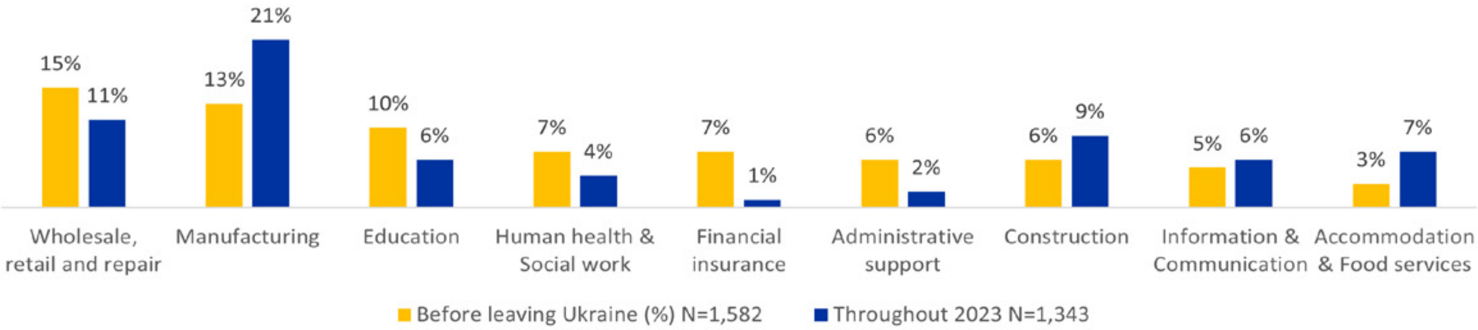
Figure 12: Sources of financial support (%), (N=1,772) (multiple answers possible)



Employment sector

Of the respondents who reported being employed in Ukraine, the top fields were manufacturing, wholesale, retail, repair as well as construction. During 2023, it is observed that there was a higher percentage of men involved in the construction sector compared to women (18% versus 30%), whereas more women are engaged in wholesale, retail, and repair than men (14% versus 4%).

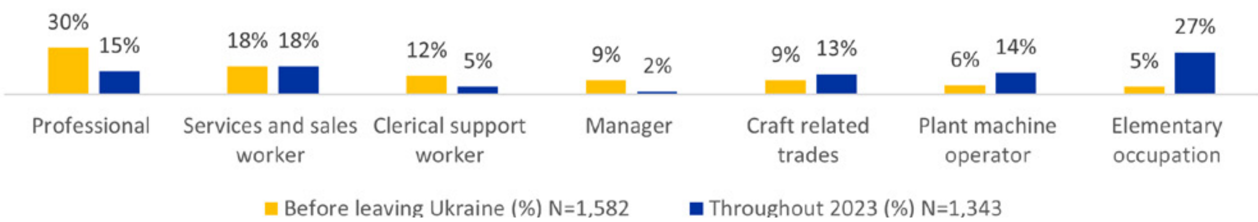
Figure 13: Top sectors of employment in Ukraine versus in Estonia (%)



Occupation

The respondents' occupations underwent changes before they left Ukraine and after they moved to Estonia. The percentage of individuals with professional occupations decreased from 30 per cent to 15 per cent. On the other hand, the same proportion of people worked in service and sales jobs (18%). Those with elementary occupations saw an increase from five per cent to 27 per cent. Conversely, individuals in managerial occupations decreased from nine per cent to two per cent.

Figure 14: Top occupations in Ukraine versus in Estonia (%)



Inactive in employment

The inactive population (N=447) consists of individuals not actively seeking employment, including students (38%), retirees (34%), individuals on parental leave (21%), and those unemployed and not seeking a job (7%).

Among the inactive respondents, six per cent of women and one per cent of men indicate not actively searching for a job despite being unemployed. Notably, 21 per cent of women are on maternity leave, whereas less than one per cent of men are on paternity leave.

Unemployed and not looking for a job

Individuals who are unemployed and not actively seeking a job (N=31) indicate that their absence from the labour market was primarily driven by their medical conditions (32%) or family responsibilities (29%), such as caring for children, elderly family members, or persons with disabilities. Some plan to leave soon (16%), while six per cent do not feel a need for it. The remaining nine per cent cited other reasons.

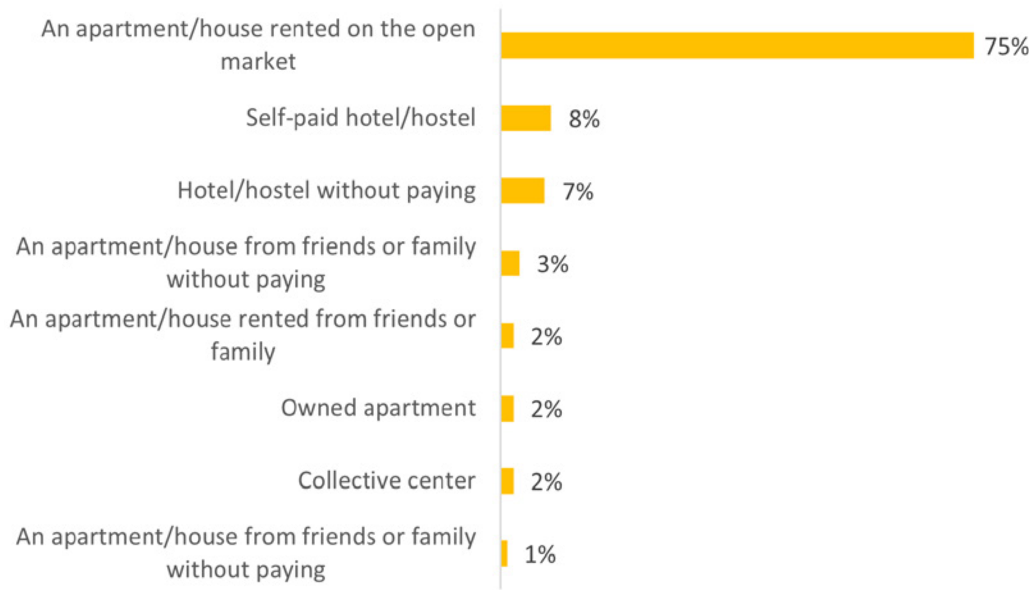
4. Registration and inclusion

Eighty-six 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 (13%, N=320), 70 per cent claimed to be ineligible for TP, while 18 per cent were planning to leave Estonia soon. Nine per cent were planning to register. The remaining three per cent of respondents either did not know how to register for TP or cited other reasons for not registering.

Accommodation

Seventy-five per cent of respondents reported residing in apartments rented on the open market, while eight per cent lived in self-paid hostels or hotels. Seven per cent stayed in hotels or hostels without paying, three per cent stayed with friends without paying, two per cent stayed with friends or family for rent, another two per cent owned their own apartment or stayed in collective centers. The remaining one per cent stayed in apartments provided by friends or family without paying.

Figure 15: Accommodation of respondents (%), (N=2,378) (multiple answers possible)



Seventy-one per cent of respondents aimed to remain in their current accommodation for as long as possible. Another 17 per cent indicated their intention to continue living in their current accommodation until their return to Ukraine, while one per cent specified that they intend to stay until their accommodation is available free of charge. Seven per cent of respondents were uncertain about the duration of their stay in their current accommodation, while the remaining three per cent cited other factors, such as waiting for an opportunity for a better apartment or completing their studies.

Finances

The survey included a specific set of questions for all respondents who had been in Estonia for longer than 3 months (N=1,769). These questions focused on their inclusion and registration services, including access to finance, education, and consular services.

In regard to finances, 69 per cent of respondents reported having no issues accessing their finances using foreign debit or credit cards. Thirty per cent were not able to withdraw cash from ATM or make payments using their own debit or credit card. The remaining one per cent preferred not to answer.

Ninety-seven per cent of respondents reported having a personal bank account in Estonia, while only three per cent did not. Among respondents who indicated that they had not opened a personal bank account in Estonia (N=48), 58 per cent mentioned planning to open one, while 31 per cent reported not needing a bank account. Other reasons cited included ineligibility (4%), intentions to leave soon (2%), uncertainty about how to open a bank account (2%).

Children education

Fifty-three per cent of all respondents had children. Among them, 708 respondents specified whether their children were attending local schools and kindergartens.

Of these respondents, 62 per cent had their children enrolled and attended local schools. Thirty-one per cent had their children engaged in both local and online education from Ukraine, while five per cent enrolled their children in online education in Ukraine.

The remaining two 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=15), they either planned to enroll their children or had other unspecified explanations.

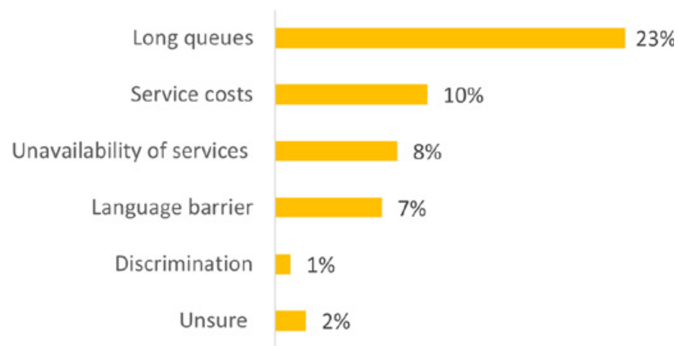
During the first half of 2023, 45 per cent of children were enrolled in local schools, whereas during the second half, this figure rose to 70 per cent. Conversely, the percentage of those enrolled in both local and online schools dropped from 42 per cent during the first half of the year to 26 per cent during the second half.

Obstacles to healthcare provision

Upon examining obstacles to healthcare services, respondents identified the primary challenges they encounter when seeking healthcare.

Among those who provided information on this question (N=1,282), the most frequently mentioned obstacles include long queues (23%), service costs (10%), unavailability of services (8%), language barrier (7%), discrimination (1%).

Figure 16. Top obstacles to healthcare provision (%) (N=1,282) (multiple answers possible)



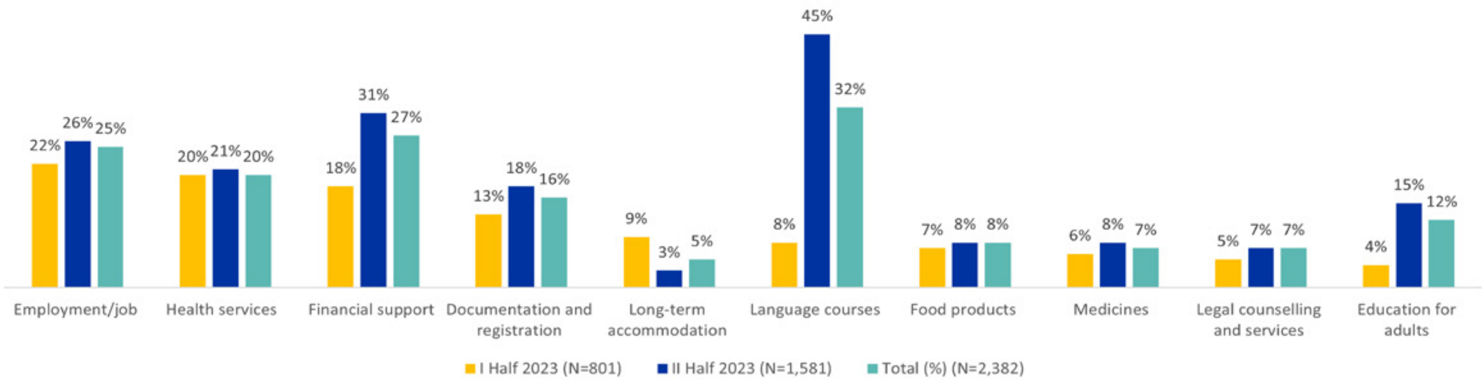
Consular services

Among the respondents who have been settled in Estonia for over three months (N=1,772), 85 per cent stated that they knew how to contact their consular representatives, whereas, 15 per cent of respondents did not. However, only 21 per cent had already reached out to the consulate.

5. Immediate Needs and Assistance

The survey asked respondents to indicate their top priority needs. The most cited needs included language courses (32% of respondents), financial support (27%), and employment support (25%). Respondents also indicated a need for health services (20%), documentation assistance (16%), education for adults (12%), food supplies (8%), medicines (7%), psychological counseling (7%), and legal assistance (7%). Additionally, 27 per cent of respondents stated that they did not require any immediate support.

Figure 17. Top 10 priority needs, 2023 (%), (N=2,378) (multiple answers possible)



Throughout the year, the top priority needs among respondents have undergone notable shifts between the first and second halves of 2023. During the initial six months, language courses were highlighted as a priority need by only eight per cent of respondents. However, this figure saw a significant increase during the latter half of the year, with 45 per cent of respondents identifying language courses as a top priority.

Similarly, the demand for financial support experienced a significant increase, from 18 per cent in the first half to 31 per cent in the second half of the year. A similar trend was observed for the need for adult education, which saw an increase from four per cent to 15 per cent over the same period.

On the contrary, only one need saw a decrease. The demand for long-term accommodation declined from nine per cent in the first half to three per cent in the second half of the year.

Assistance

Seventy-five per cent of respondents had received some form of humanitarian assistance since their initial displacement from Ukraine. The top forms of assistance received by respondents (N=1,780) were transportation support (84%), food supplies (76%), financial support (64%), and language courses (47%). Additionally, 38 per cent of respondents received accommodation support, 24 per cent received clothes and shoes, and another 24 per cent received personal hygiene and sanitary supplies.

Ninety-one per cent of the respondents knew where to seek humanitarian assistance, while nine per cent stated they did not know where to seek assistance. Among the respondents who had been in Estonia for more than three months or had indicated they were settled in Estonia (N=1,772), the majority of 90 per cent claimed they had not experienced any difficulties when receiving humanitarian support.

Areas in which information is needed to get more assistance

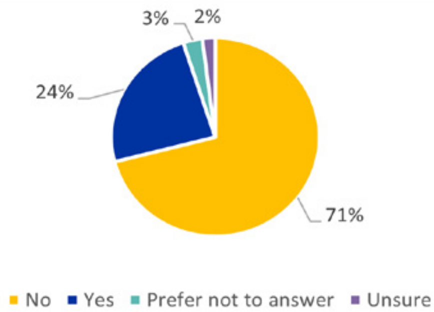
Among the nine per cent (N=222) who were uncertain about how to access assistance, their information needs primarily pertained to general information (32%), financial support (29%), health services (18%), language courses (16%), employment (11%), documentation assistance (10%), and food supplies (9%).

6. Challenges in the country of displacement

Experiences of unequal treatment

Seventy-one per cent of the respondents claim they have not experienced any form of discrimination during their journey or their time in Estonia. However, 24 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.

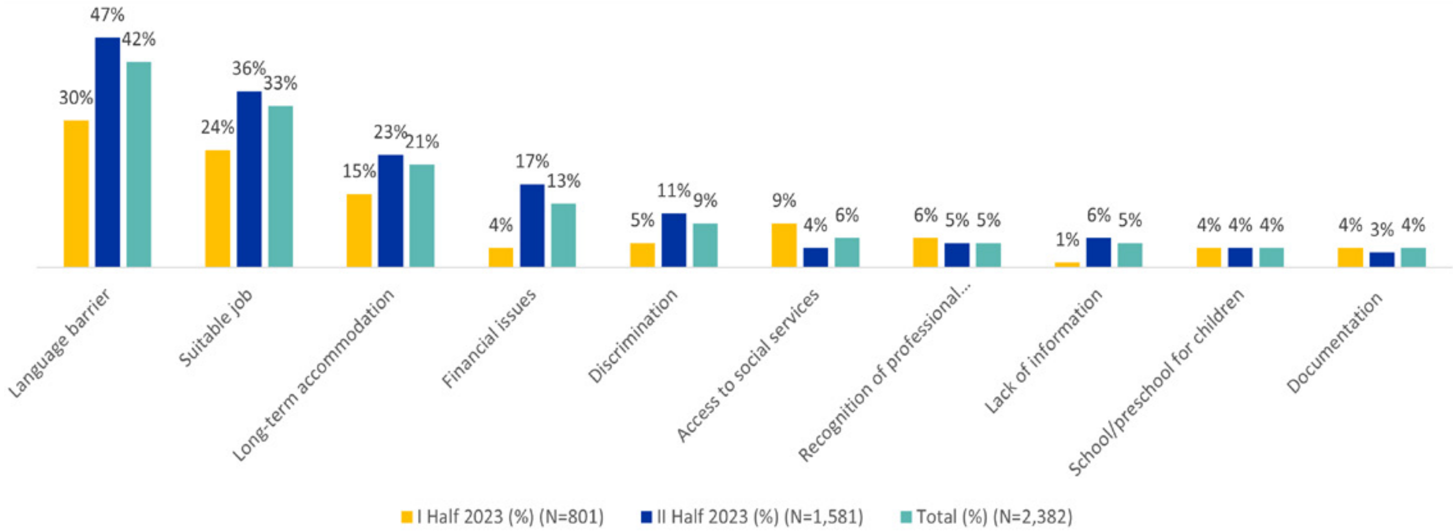
Figure 18. Reported experience of unequal treatment (%), (N=2,378)



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=1,772), the most mentioned challenges included the language barrier (42%), limited job opportunities (33%), and securing housing (21%). Other cited challenges included financial issues (13%) and facing discrimination (9%). A smaller percentage of respondents expressed challenges related to access to social services (6%), lack of general information (5%), recognition of their education credentials or skills (5%), difficulties in enrolling their children in schools (4%), and documentation issues (3%).

Figure 19. Inclusion challenges (%), (N=2,378) (Multiple answers were possible. As a result, percentages may exceed 100%)



Throughout the year, certain inclusion challenges saw an increase. In the first half of the year, the language barrier was highlighted by 30 per cent of respondents, a figure that significantly rose to 47 per cent in the latter half. Similarly, the quest for suitable employment presented challenges for 24 per cent of respondents during the initial months, increasing to 36 per cent in the latter half. Financial issues also became more prevalent, with four per cent of respondents identifying them as a challenge in the first half, compared to 17 per cent in the second. However, there was a positive trend observed amidst these challenges. The accessibility of social services as an inclusion challenge declined from nine per cent to four per cent, indicating progress in this area over time.

7. Methodology

BACKGROUND

IOM's Displacement Tracking Matrix (DTM) is a system to track and monitor displacement and population mobility. It is designed to regularly and systematically capture, process and disseminate information to provide a better understanding of the movements and evolving needs of displaced populations, whether on site or en route.

Since April 2022, IOM Displacement Tracking Matrix has been regularly surveying people who are residing in the eleven countries included in the Regional Refugee Response Plan for Ukraine. The aim of the survey is to improve the understanding of their profiles, displacement patterns, intentions and needs. The survey is deployed in 6 countries neighbouring Ukraine – Belarus, Hungary, Poland, the Republic of Moldova, Romania, and Slovakia, and other 5 countries in Europe, particularly impacted by the arrivals of refugees from Ukraine, including Bulgaria, Czechia, Estonia, Latvia and Lithuania.

Face-to-face surveys were conducted by 9 trained enumerators, with adult refugees from Ukraine (18+ years-old). Surveys were collected at selected locations (information centres, humanitarian aid distribution points, accommodation centres, transit points and IOM premises) in eleven regions of Estonia. The survey is anonymous and voluntary, administered after obtaining consent from the respondent. Respondents can stop the survey at any time. In Estonia, the questionnaire is available in English, Ukrainian and Russian, and the preferred language is determined by the interviewee. Only fully completed surveys are taken into account for analysis.

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 mechanism in place.

ABOUT THE SURVEY

Aim To improve the understanding of the profiles of Ukrainian refugees residing or transiting through Estonia, including their displacement patterns, intentions and needs.

Location and execution Face-to-face surveys were conducted by 5 trained enumerators stationed at selected locations in 11 regions of Estonia. Surveys are conducted in English, Ukrainian and Russian with the help of a mobile application.

Target population The analysis focuses on the needs and intentions of Ukrainian refugees in Estonia.

Regional data collection and analysis The survey is deployed in 11 countries: 6 neighboring countries (Belarus, Hungary, Poland, the Republic of Moldova, Romania, Slovakia), and 5 other countries (Bulgaria, Czechia, Estonia, Latvia and Lithuania) impacted by the arrival of refugees from Ukraine.

LIMITATIONS

The sampling framework was not based on verified figures of refugees from Ukraine entering through all land border points or staying in the various regions where the surveys are conducted, due to the lack of baseline information.

The geographic spread of enumerators deployed captures a wide range of locations. Whilst the overall results cannot be deemed as representative, the internal consistency of data collection in each country and at the regional level suggests that the current sampling framework produces findings of practical value.

While every attempt was made to capture all types of locations, the operational reality of fieldwork was confronted with different levels of accessibility of BCPs and other transit and stay locations, including the different availability of possible target individuals to comfortably spend 10-20 minutes responding to the questionnaire depending on a mix of personal conditions. Other factors more related to the conditions at a specific location and period, such as organizational changes in the entry and transit areas from national authorities, or weather conditions, also play a role.

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.

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