



Final Analysis

December
2024

ROMANIA SOCIO-ECONOMIC INSIGHTS SURVEY

ACKNOWLEDGMENTS

SEIS was conducted within the framework of:



Developed, implemented, and analysed by:



ROMANIA

SOCIO-ECONOMIC INSIGHTS SURVEY 2024



Regional Refugee Response
for the Ukraine Situation

OBJECTIVES & METHODOLOGY

The **SEIS** is a collaborative process which identifies the most pressing needs of refugees across various sectors.

Comprehensive data are gathered to guide the planning, implementation, and evaluation of programs and interventions aimed at addressing those needs. The SEIS findings align to the MSNAs conducted in 2023 and 2022 to produce comparative results over time:

The needs of refugees in Romania, focusing on the in-country refugee population;

The level of socio-economic inclusion and access to national systems;

Service gaps and refugees' priorities for the coming year;

Identify changing trends in refugees needs.

The SEIS represents a key source of information for the 2025 RRP planning, which aims to capture funding and planning requirements for the response.

These results cover the following topics:



1.DEMOGRAPHICS



2.PROTECTION



3.EDUCATION



4.SOCIAL ECONOMIC
INCLUSION AND
LIVELIHOOD



5.HEALTH



6.ACCOMMODATION



1008 HHs
(covering **2915**
individuals)



Refugees living in Romania, e.g.. in private accommodation, with host families, rentals, hostels/hotels and in government-designated collective sites, based on two UNHCR dataset - Cash Assistance and Core Relief Item (CRI) Distribution Monitoring.



Center for Comparative Migration
Studies (CSCM),
International Organization for
Migration (IOM),
Romanian National Council for
Refugees (CNRR)



From **May 20th** to
July 25th of 2024



UNHCR
CSCM
IOM

The preliminary results are based on the analysis of part of the total surveys conducted.

POPULATION	Ukrainian beneficiaries of temporary protection living in Romania, for example in private accommodation, with host families, rentals, hostels/hotels and in government-designated collective sites.
MODE	Face to face household interviews.
DATA COLLECTION	From 20 May to 25 July by enumerators from CSCM + IOM + CNRR .
SAMPLE SIZE (preliminary r. / SEIS)	<p>1,008 HHs covered/1,000 HHs planned; covering 2,915 individual HH members</p> <p>6% living in collective sites (incl. hotels and workers hostels)</p> <p>93% living outside of collective sites.</p>

SAMPLING AND REPRESENTATIVENESS

Cash and Core Relief Items (CRI) Assistance Lists (15.100 HHs included in the sampling)

Sampling method
**STRATIFIED
RANDOM
SAMPLING**

One strata was added, respecting the county distribution of the Ukrainian households under temporary protection. Interviews were conducted in 25 counties and Bucharest, based on the UNHCR geographical distribution. 84% of the interviews were conducted face to face in the county where respondents currently live. However, for counties with small number of registered households, the interviews were conducted online via video-calls. Additionally, some of the interviews were conducted online, exceptionally for households dealing with specific situations (people with disabilities, single parent, long working hours etc.).

Post-stratification weighting

To mitigate the potential bias arising from the lack of complete sampling frames of all refugees from Ukraine hosted in the country, post-stratification weighting was implemented. Household weights were calculated by comparing the distribution of respondents across four main strata, combining age and gender with the distribution of all adult beneficiaries of TP in the country for those same strata. The calculated household weight was then applied to each individual within the household.

QUALITY ASSURANCE

Quality Assurance mechanisms (training with enumerators, constant communication with them, random controls, data weighting) have been put in place.

Results are indicative.

Data analysis quality assurance

The data analysis process involved multiple stages, beginning with data cleaning to exclude cases containing contradictory or incomplete information. Experts from CSCM, IOM, and UNHCR collaborated throughout the analysis to ensure accuracy and reliability. Additionally, the data was weighted by UNHCR's bureau to enhance its representativeness and validity.

LIMITATIONS

Data collection during summer / school holidays influenced partially the response rate.

Lack of comprehensive national data on population locations, and mobility.

Sensitivity around **protection and income questions**, therefore, important non-response rate and less reliable data.

Male population is underrepresented (14% of respondents and 37% of males in HH composition). Data have been weighted to address this limitation.

Respondent bias: certain indicators may be under-reported or over-reported due to the subjectivity and perceptions of respondents.

Results are only representative for the population covered in the datasets, which only cover people receiving UNHCR assistance. This may have resulted in some biased results.



DEMOGRAPHICS

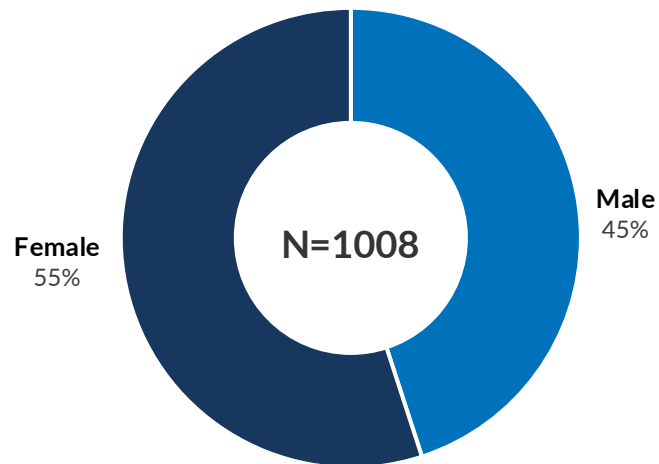
1,008 NUMBER
OF HOUSEHOLDS

2,915 NUMBER
OF HHs MEMBERS

3 AVERAGE
HHs SIZE

44 YEARS
AVERAGE AGE OF
RESPONDENTS

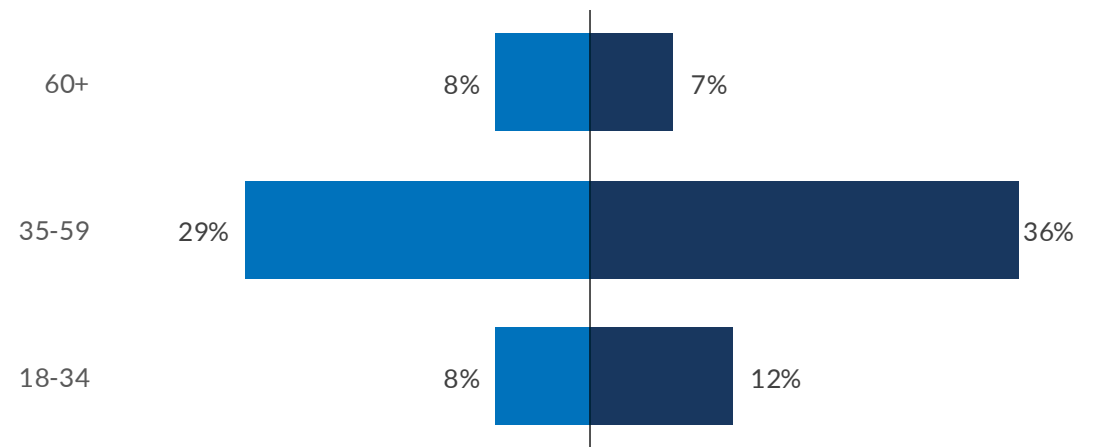
Gender breakdown of the respondents



Respondent distribution by age and gender

N=1008

■ Male ■ Female



Around **55%** of respondents were **women**, **45%** were **men**. The largest age group is 35-59 years (65%). The highest representation of females is in the 35-59 age group (36%), while younger (18-34) and older (60+) age groups have lower percentages, at 12% and 7%, respectively. The distribution for males is similar, with the highest representation also in the 35-59 age group (29%). The younger (18-34) and older (60+) categories are similarly underrepresented, each at 8%.

Out of the 1,008 respondents, approx. 99% hold Ukrainian citizenship. The remaining 1% reported having other nationalities, including Russian, Moldovan, Slovakian, Hungarian and other. Seven of the non-Ukrainian households have secured **Ukrainian** residency permits, demonstrating that the majority of foreign nationals are legally documented to reside in Ukraine. The remaining three HHs with non-Ukrainian citizenship involve individuals with dual citizenship that includes Ukrainian nationality, giving them the right to reside in the country without additional permits.

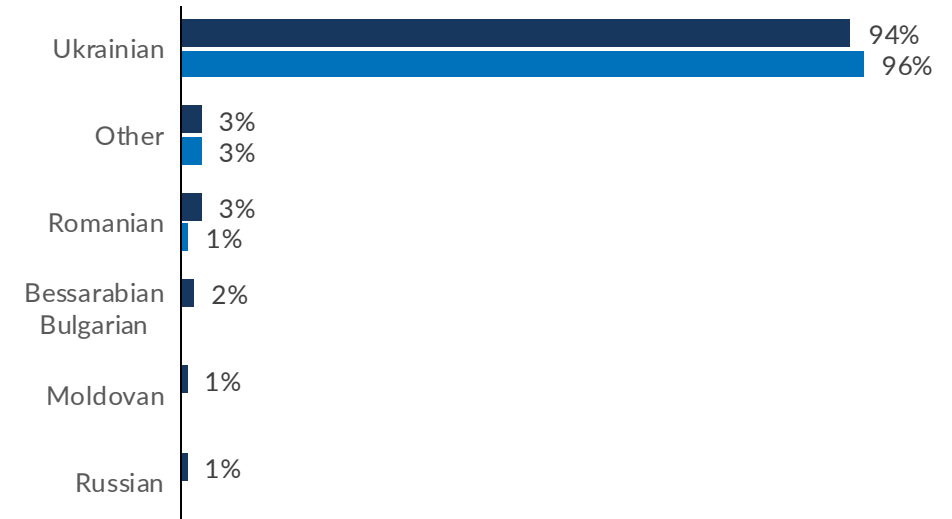
Distribution of the respondents by citizenship



Distributions of the respondents by ethnicity (self-identified)

N=1,008

■ 2024 ■ 2023

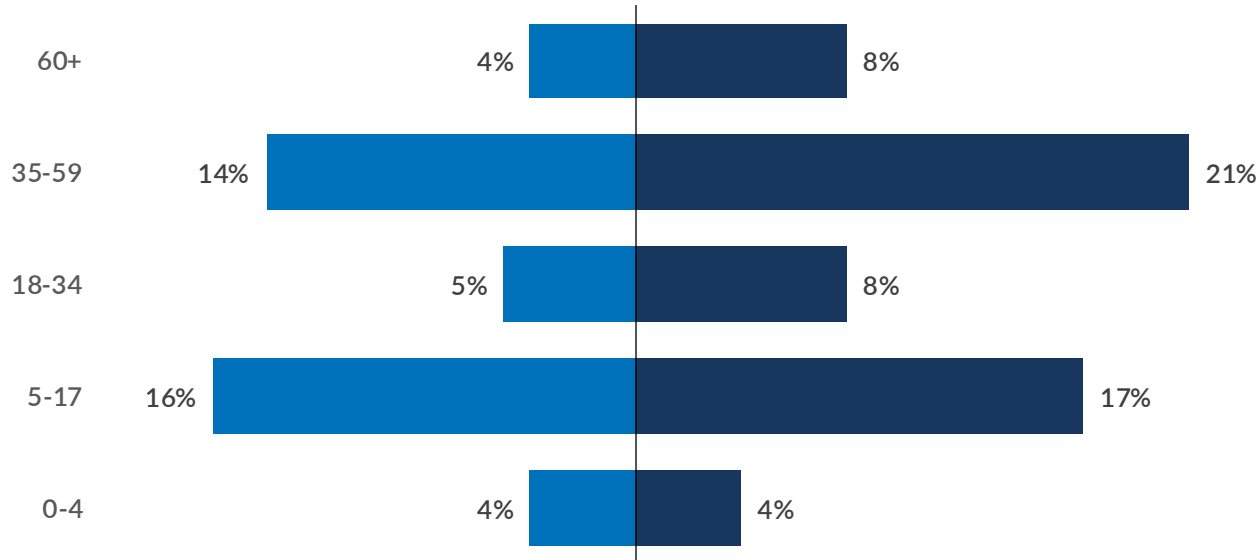


The **dominant ethnic group** remains Ukrainians, although their representation decreased from 96% in 2023 to 94% in 2024. **Romanians** saw a slight increase from 1% to 3%, marking a small but noticeable growth in their representation. **Russians and Moldovans**, previously absent in a questionnaire from the 2023, each now appear at 1% in 2024. **Bessarabian Bulgarians** are included for the first time in 2024, representing 2% of respondents.

Respondent distribution by age and gender

N=2,915

■ Male ■ Female



AVERAGE
HH SIZE

3



% HHs WITH
CHILDREN

65%



% HHs WITH
INFANTS (0 - 12
MONTHS OLD)

3%



% HHs WITH A
PREGNANT
WOMAN

3%

% HHs WITH
BREASTFEEDING
WOMEN

5%



% of HHs WITH
OLDER REFUGEES
(60+)

27%

(22% in 2023)

% of HHs WITH
EMPLOYED
MEMBERS

57%



% of HHs WITH AT
LEAST ONE PERSON
WITH DISABILITY
LEVEL 3* AND ABOVE

25%

(17% in 2023)

% of
INDIVIDUALS
WITH LEVEL 3
OF DISABILITY

11%

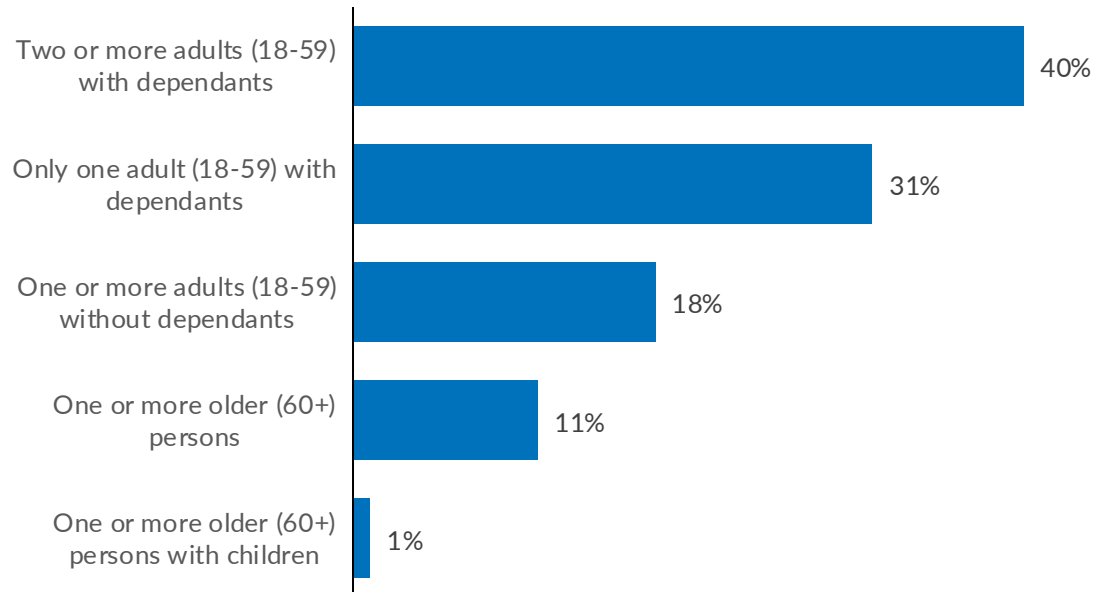
(7% in 2023)

*Level 3 of disability is computed based on the respondents who answered "a lot of difficulty" and "can not do at all" in the survey. The criteria for level 3 of disability was established by the Washington Group on Disability Statistics.

Household Typology 1

Composition and dependency patterns

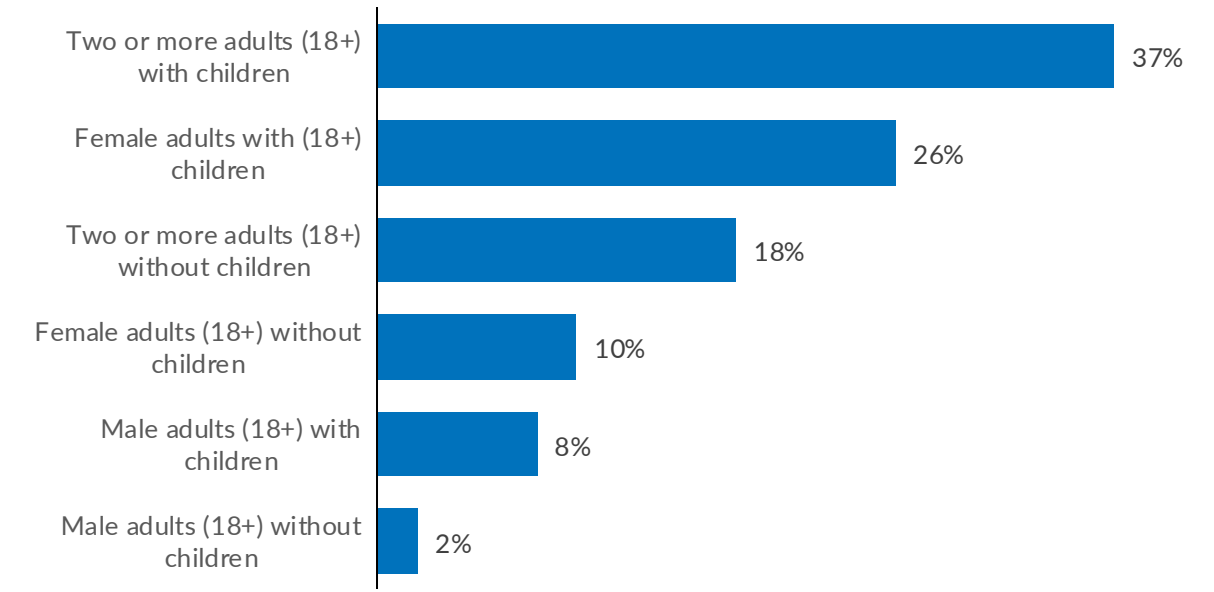
N=1008



Household Typology 2

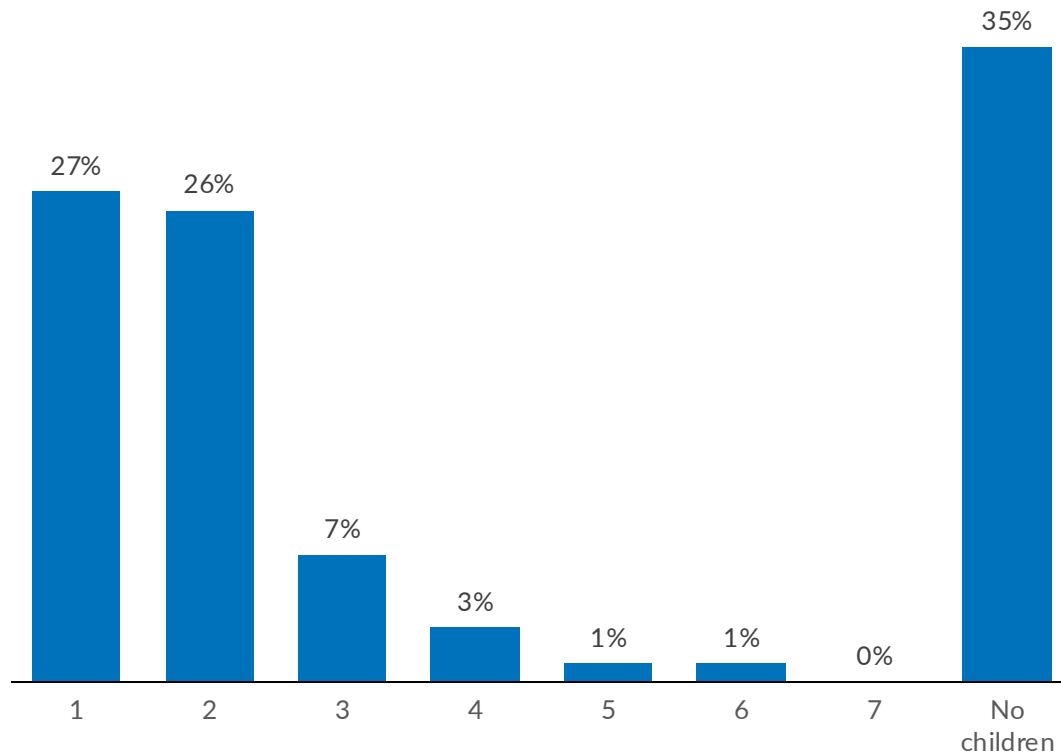
Adult composition and presence of children

N=1008



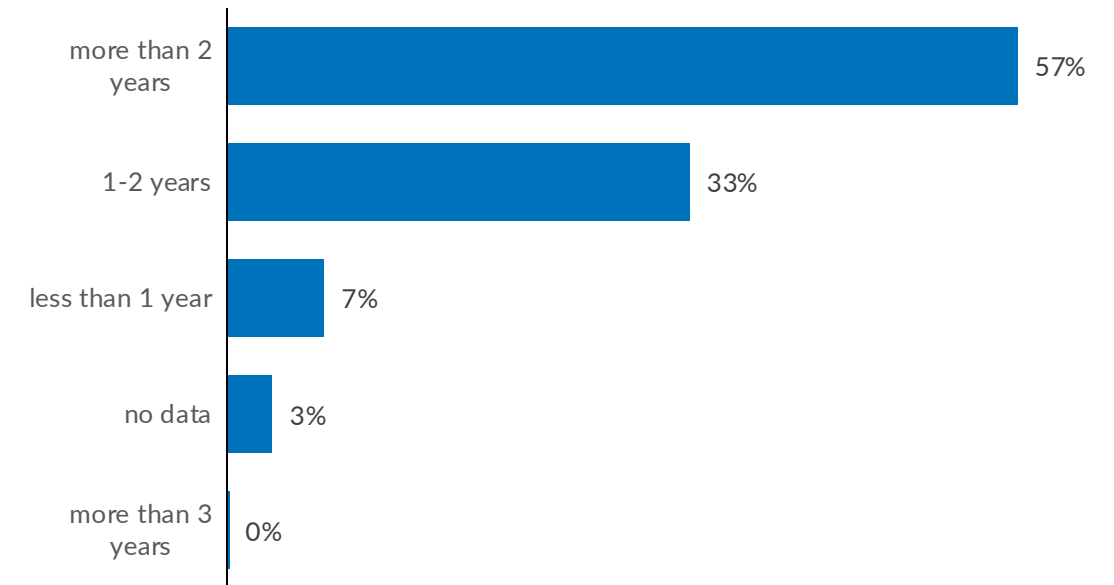
Distribution of HHs by the number of children

N=1008



% of HH members by the length of displacement

N=2915



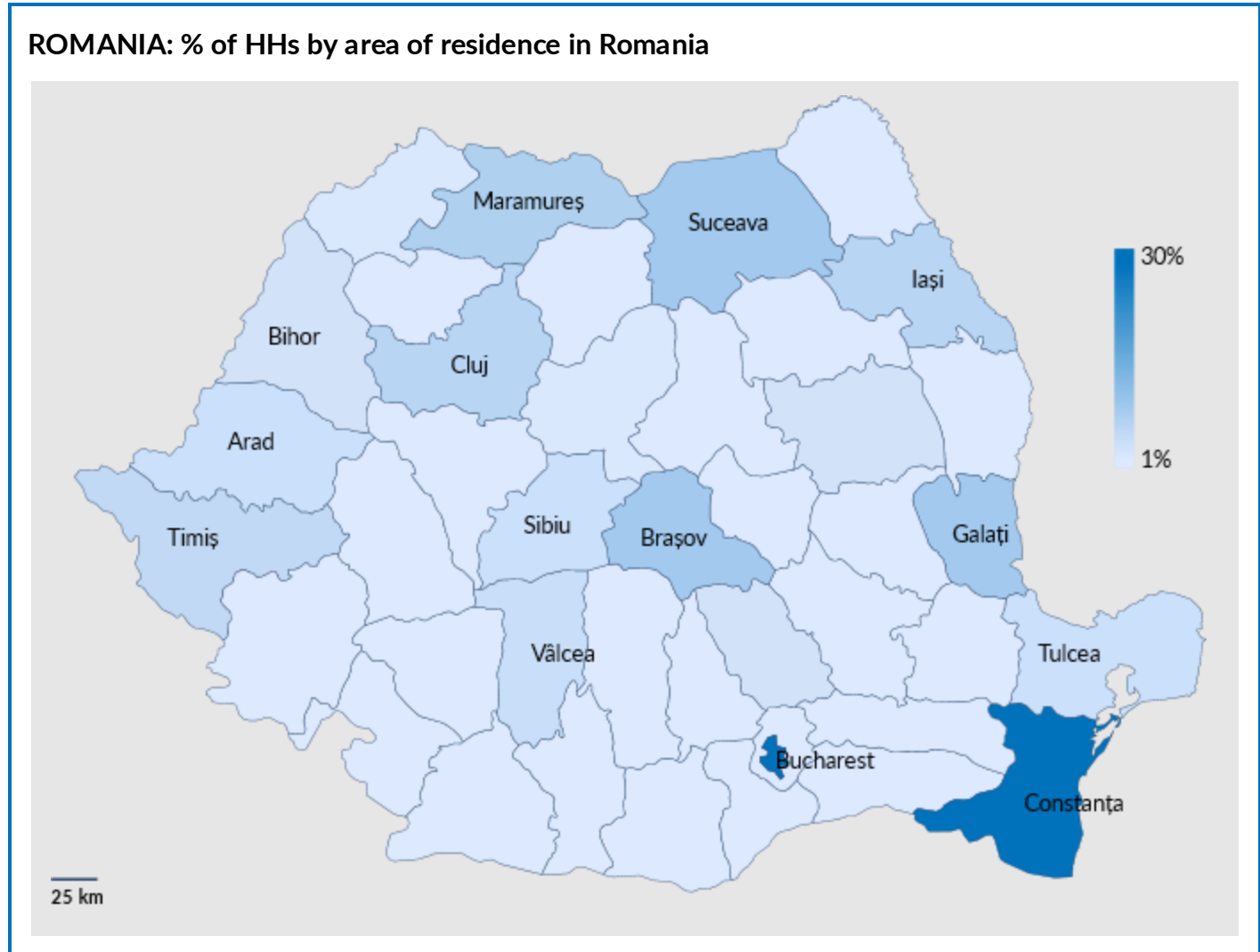
The largest share of the HHs members reside in Romania for two or more years.

This distribution highlights that the majority of refugees have established a longer-term presence in Romania, while a smaller portion consists of more recent arrivals. This shows a trend toward settlement among a large share of the Ukrainian refugee population.

Bucharest led with the highest number of participants, amounting to **29%** of the total respondents. This reflects the city's role as a densely populated urban center and a potential hub of survey engagement.

Following Bucharest, **Constanța** accounted for **24%** of respondents, demonstrating strong participation from this coastal region. **Suceava** came in third with **9%** of respondents, while **Galați** and **Brașov** each amounted to **6%**. These figures highlight engagement from various parts of the country, both urban and semi-urban.

Smaller but noteworthy contributions came from **Maramureș** (4%), **Timiș** (3%), and **Cluj** (3%), each reflecting the diversity of the sample and the geographic spread. Lastly, **Iași** and **Sibiu** each represented **2%** of respondents.



The majority of Ukrainian refugees in Romania originate from Odessa (38%), Khersonska (12 %) and Mykolaivska oblasts.

Each shaded region represents the specific Oblast (province) in Ukraine from which these households have been displaced.

The **Odessa** region shares a common border with Romania, making Romanian territories geographically accessible to those seeking refuge.

In contrast, the **Kherson, Mykolaiv, Donetsk, Zaporizhia** and **Kharkiv** regions have been, and continue to be, partially occupied by Russian troops, driving people to seek safety in more secure locations.

UKRAINE: % of HHs by oblast of origin

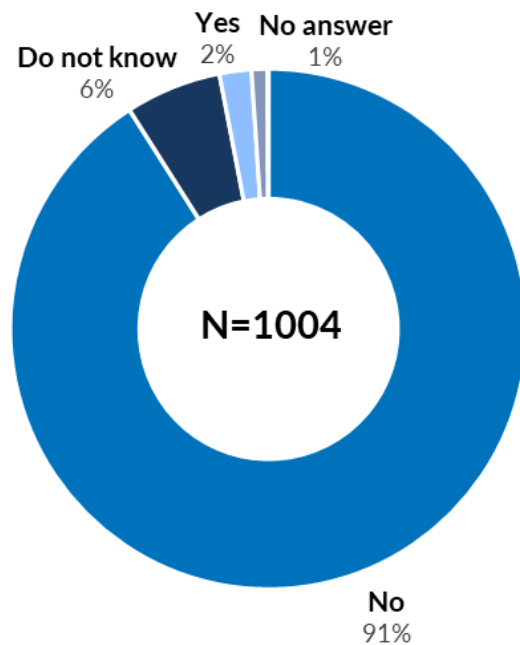




PROTECTION

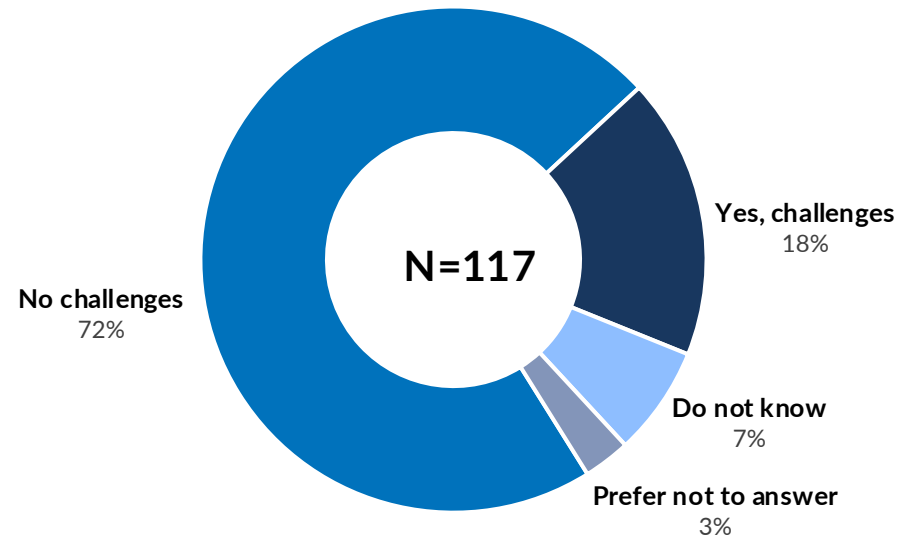
99% OF HHs HAVE BEEN GRANTED TEMPORARY PROTECTION IN ROMANIA.

% of HHs who experienced difficulties during the application process in 2024



Among the ones who declared **experiencing difficulties during the TP application process in 2024** (N=20), a part did not have the required documents (8), others perceived the waiting times as being long (3), while the rest of the responses included difficulties in accessing registration points or refusal of access to the registration procedure. However, due to the small sample size the results may not be statistically robust.

% of HH who faced challenges to register to the civil authorities in the host country the events (birth, marriage, divorce, death, etc.)

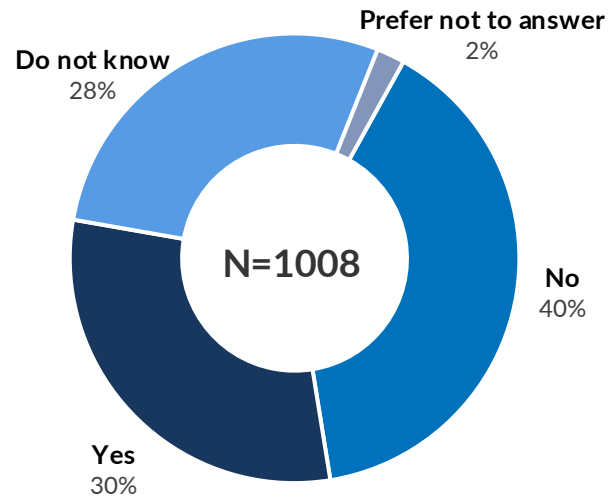


Among the 17 respondents who reported challenges in registering to the civil authorities in the host country, some (4) declared they do not know how to register, three are waiting for their documents, and five tried to register but could not meet the requirements. The rest were not very specific in their responses.

12% of the HHs registered changes in their family composition / civil status.

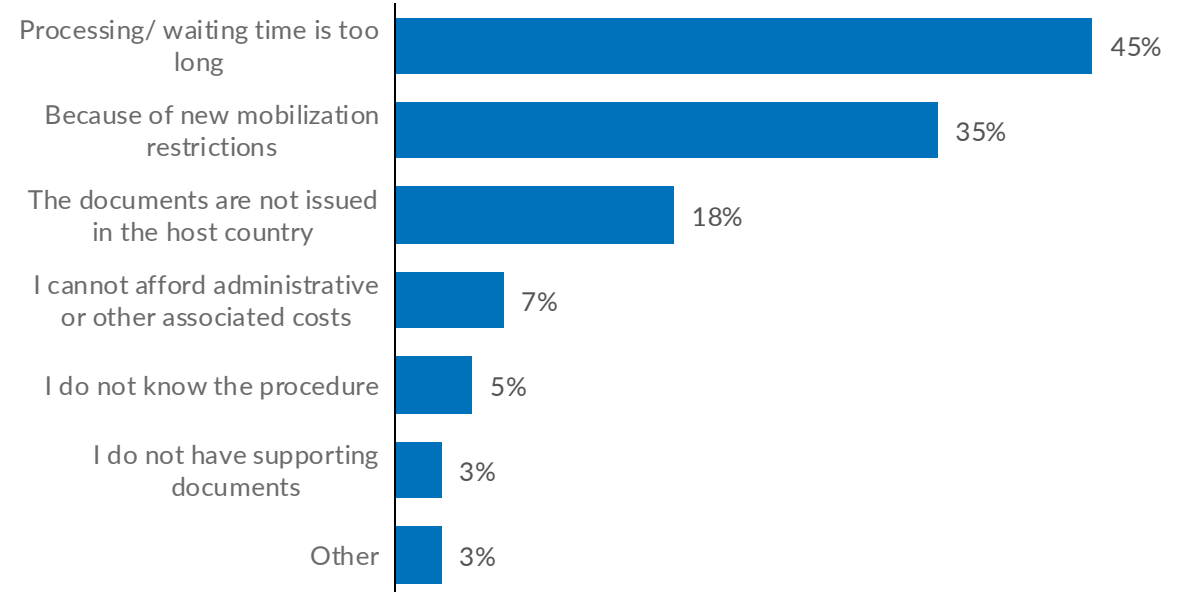
These changes included the birth (6%), the marriage (1%), the divorce (3%) or the death (3%) of some family members. From those **12%, 18% reported challenges to register the events to the civil authorities.** The main challenges recorded refer to the lack of knowledge on how to navigate the administrative process, the missing of the documents or other issues related to the access to the embassy or consulates

% of households able to obtain or replace / renew identity documents with host country authorities



Reported challenges faced in replacing/renewing identity documents (MCQ)

N=374



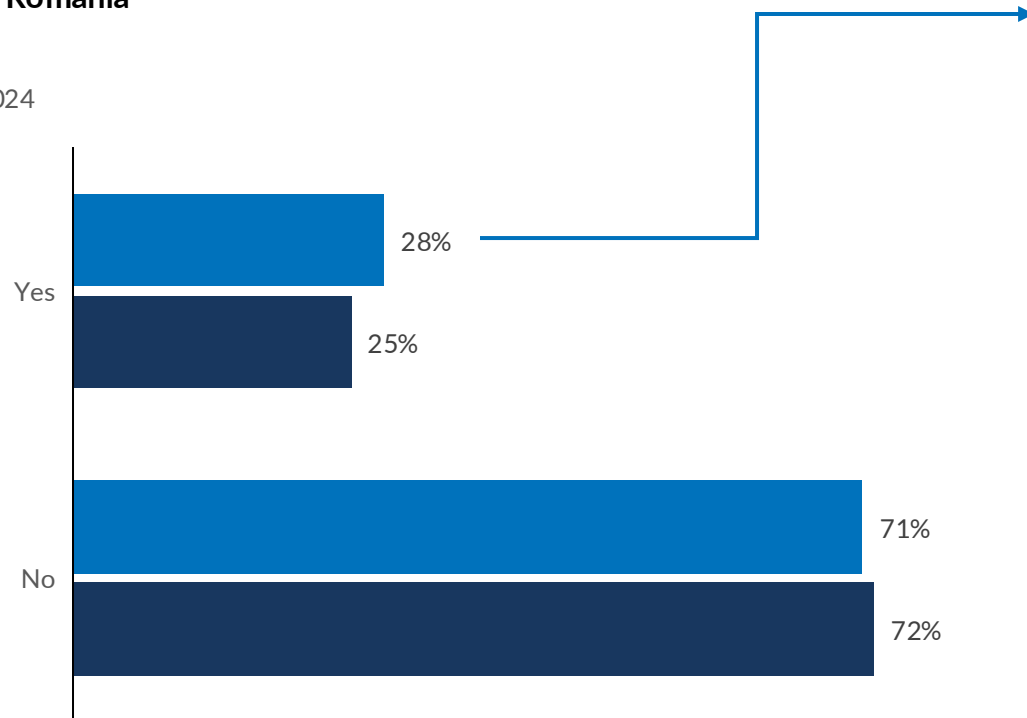
Among the reasons mentioned as challenges faced in replacing/renewing identity documents, **the processing and long waiting time (45%)** along with the **restrictions in Ukrainian consular services related to the new mobilization rules (35%)** are the most important aspects declared by respondents.

When asked about the documents needed to be replaced since the departure, the international biometric passports (32%) and the internal passports (9%) were the options frequently mentioned. However, 52% of respondents chose the “none of the above” option.

% of HHs reporting hostile behavior or attitudes from the local population since arriving to Romania

N=1008

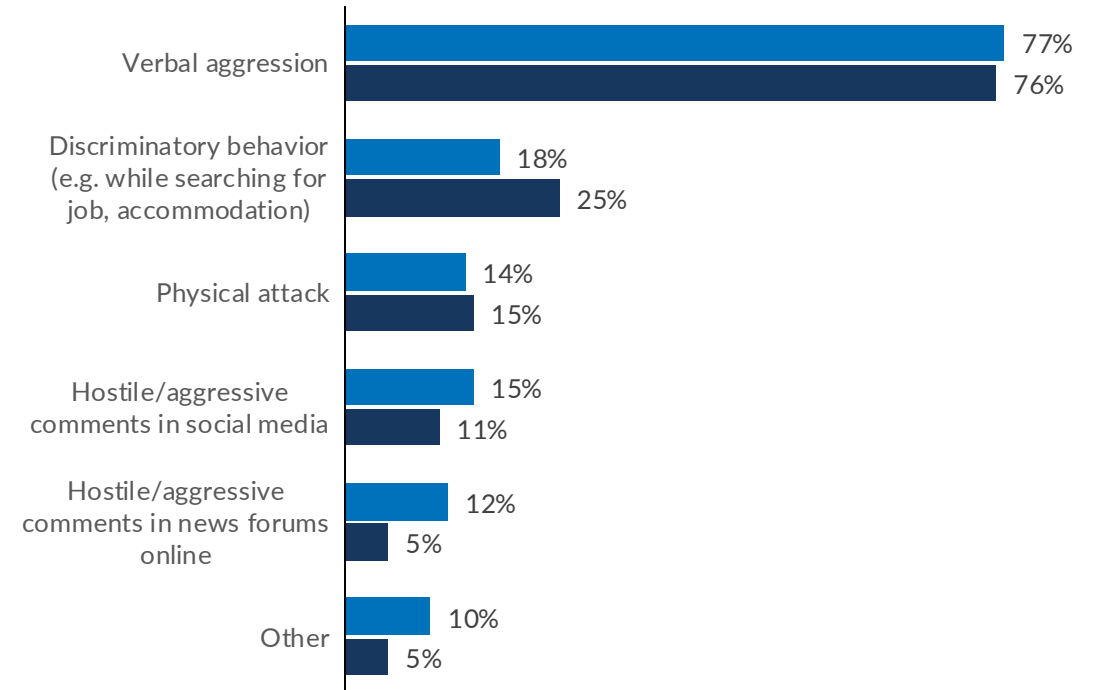
■ 2023 ■ 2024



Type of hostile behavior reported (out of the 29% reported tensions) (MCQ)

N=293

■ 2023 ■ 2024

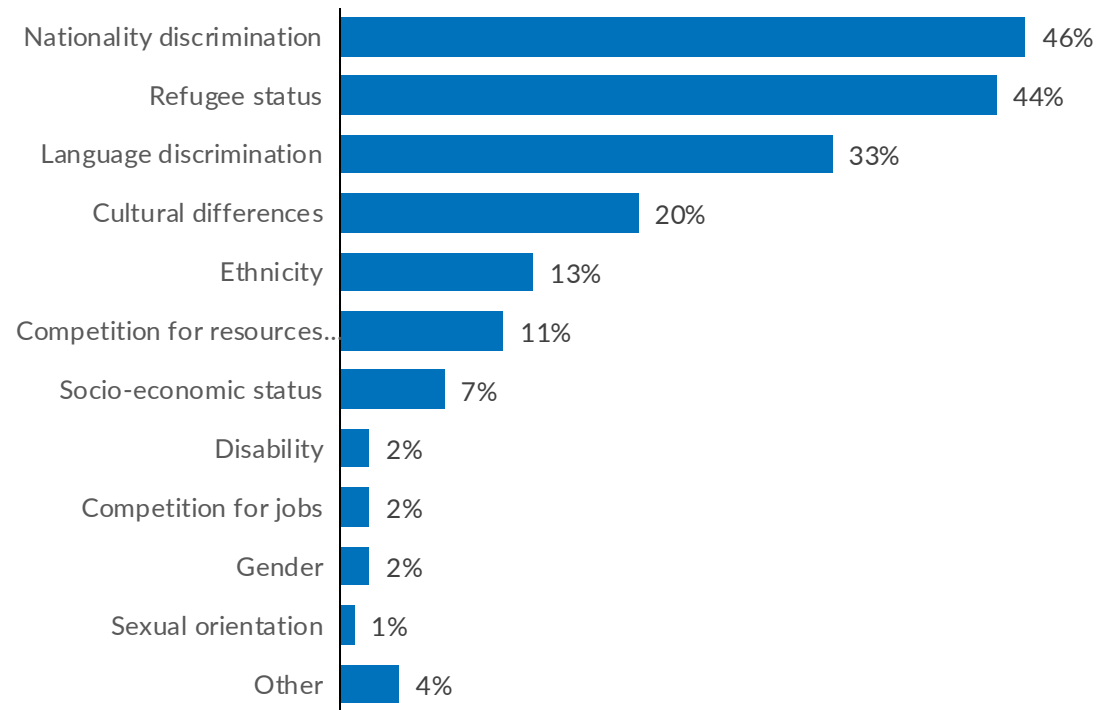


The results are very similar in 2023 to 2024 (25% and 28%) in reported hostile behavior or attitudes towards refugees.

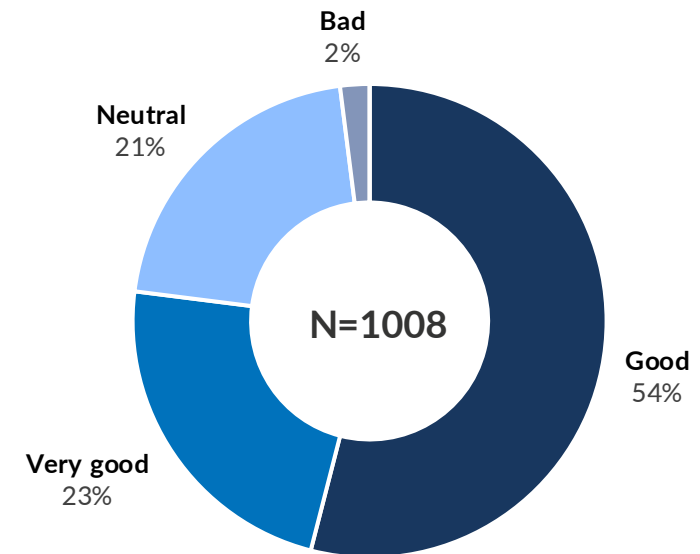
The most commonly reported hostile behaviors remain quite the same: **verbal aggressions**, an increase in **discriminatory behaviors (from 18% to 25%)** and a decrease in **hostile comments in news forums online (from 12% to 5%)**.

% of HH reporting assumed reason for hostile behavior (MCQ)

N=293



Relationship with the host community

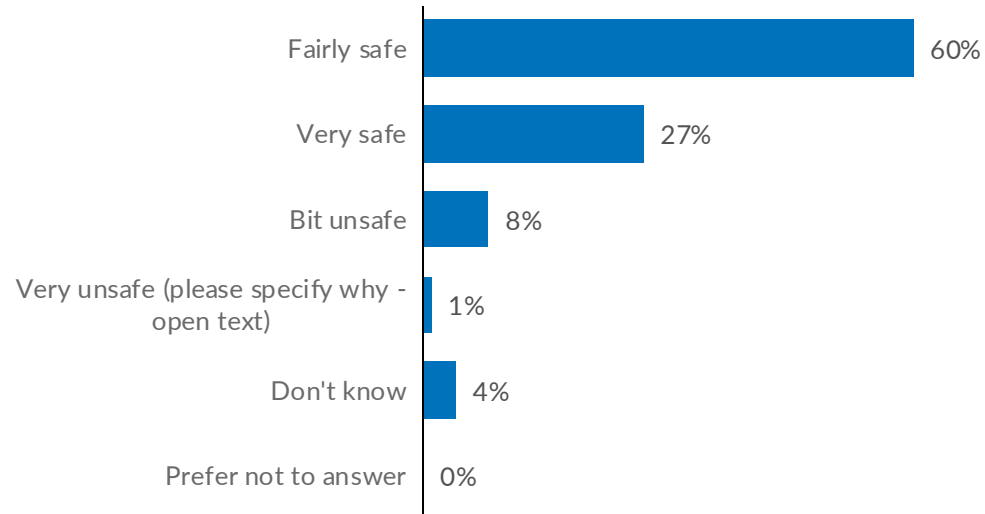


From the assumed reasons for hostile behavior, **top three responses** indicate nationality (44%), refugee status (44%) and language (33%).

However, on a positive note, most of the respondents find the relationship with the host community good (54%) and very good (23%) and only 2% consider it bad. Moreover, 68% of the respondents consider the relationship with the host community has not changed and 13% declare it has improved, indicating that generally speaking there is a good relationship between Ukrainians and the host community.

% of HH reported feeling safe walking alone after dark

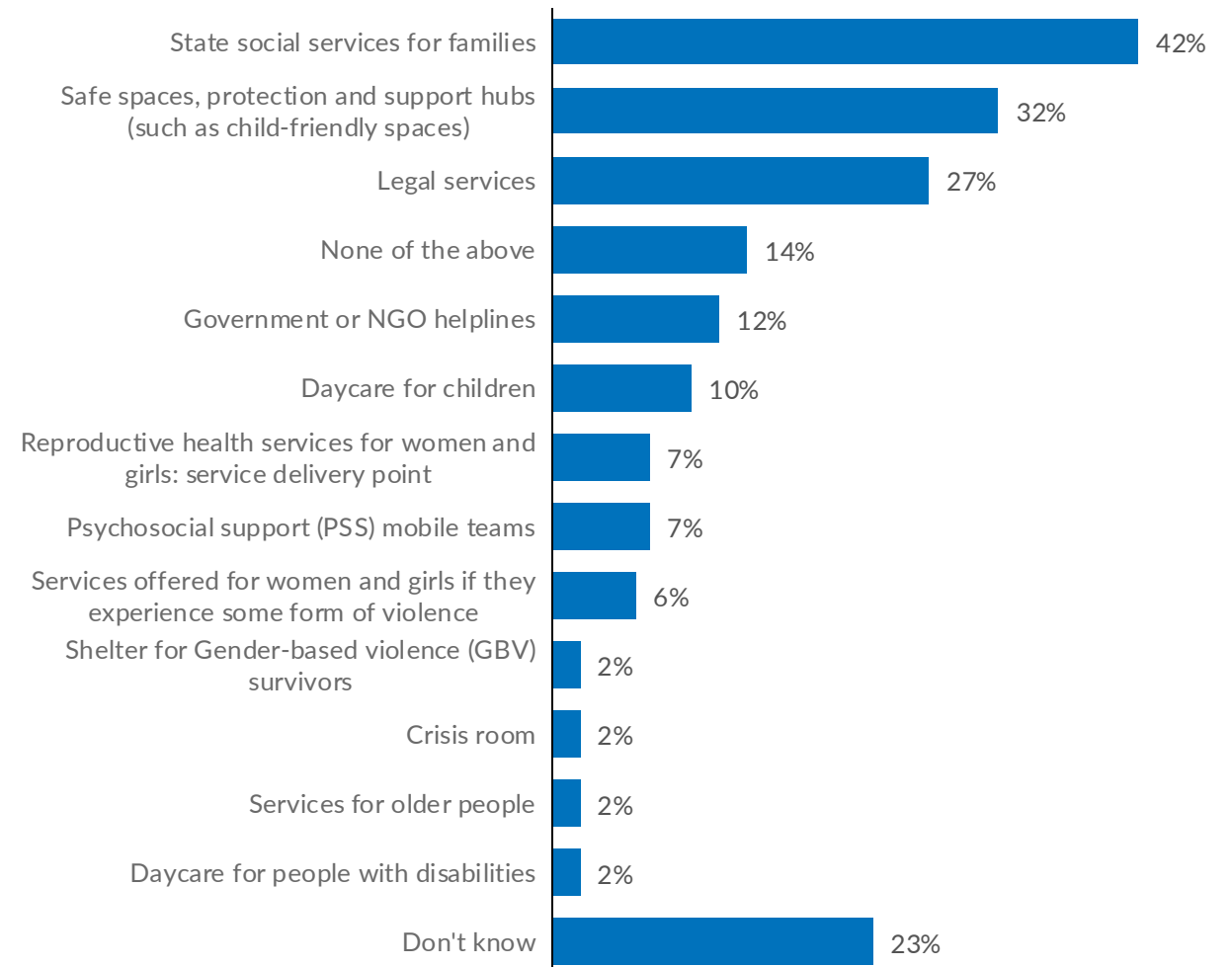
N=1008



Related to the perceived safety of the community, most of the respondents feel fairly safe (60%) and very safe (27%) walking alone after dark. Equally important, when asked about the awareness of various protection services within the host community, most respondents are aware of state social protection services for families (42%), safe spaces, protection and support hubs (32%) and legal services (27%). An important percentage of respondents (23%), however, are not aware of the existence of protection services in the area of their residence.

Awareness of protection services (MCQ)

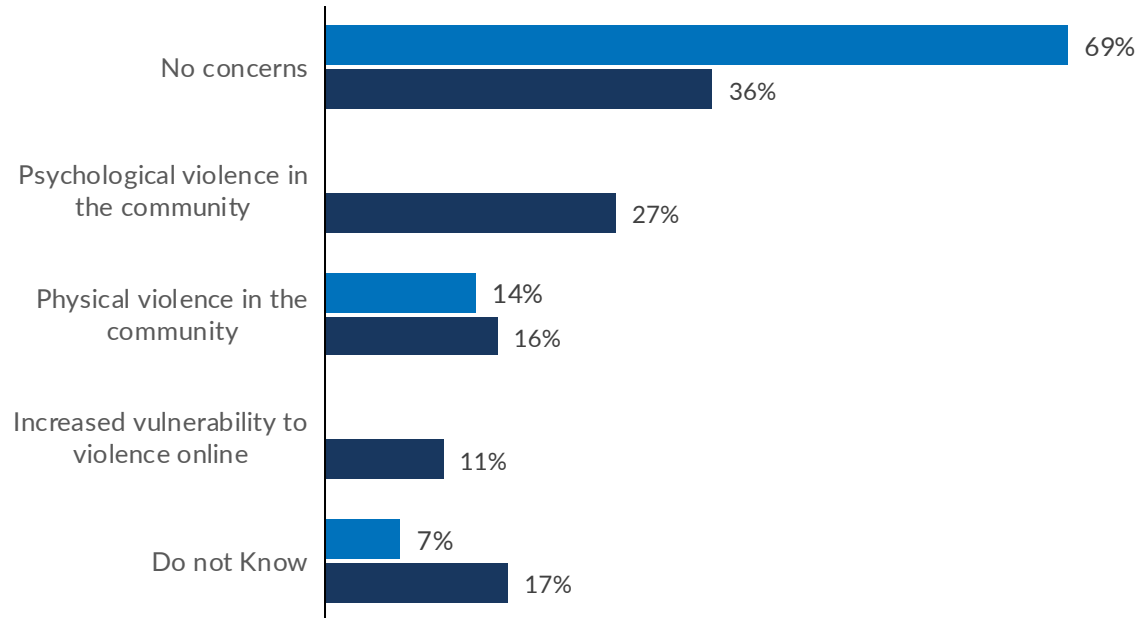
N=1008



Top three most serious risks faced by boys under the age of 18 (MCQ)

N=453

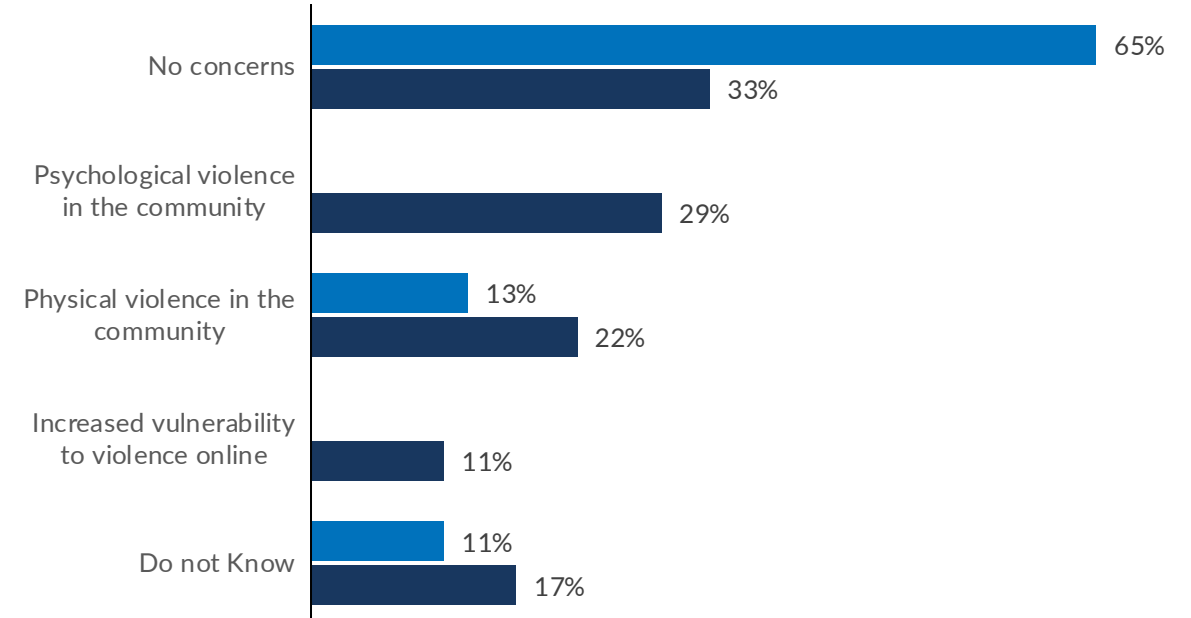
■ 2023 ■ 2024



Top three most serious risks faced by girls under the age of 18 (MCQ)

N=471

■ 2023 ■ 2024



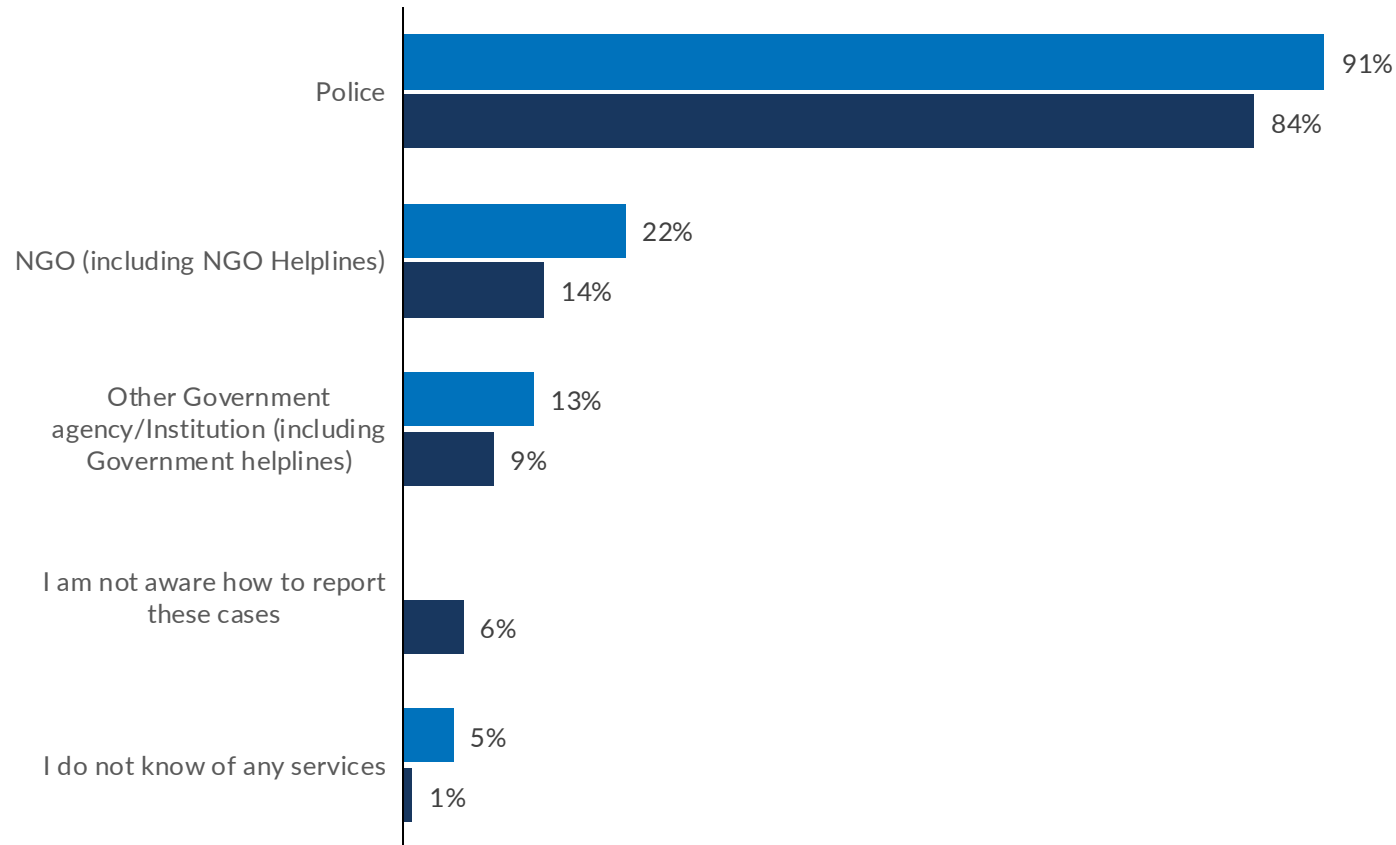
The data for 2023 and 2024 are quite hard to compare as the structure of the answers differs within the datasets.

Firstly, there are more caregivers with various concerns in 2024 than 2023, potentially as a result of a sample overrepresentation in 2024 of the vulnerable Ukrainians. Secondly, while in 2023, worsened mental health and family separation were among the top concerns for both boys and girls (around 10% for both categories), for 2024 these dimensions were less important in comparison to other variables (5% having concerns related to mental health and psychosocial well being). Psychological and physical violence alongside the increased vulnerability to online violence represent the top concerns for both boys and girls in 2024.

% of HHs being aware of services to report violence against children (MCQ)

N=1008

■ 2023 ■ 2024



In 2024, 96% of the children live with the nuclear family and the remaining 4% live in Romania with their extended family (grandparents and other biological relatives).

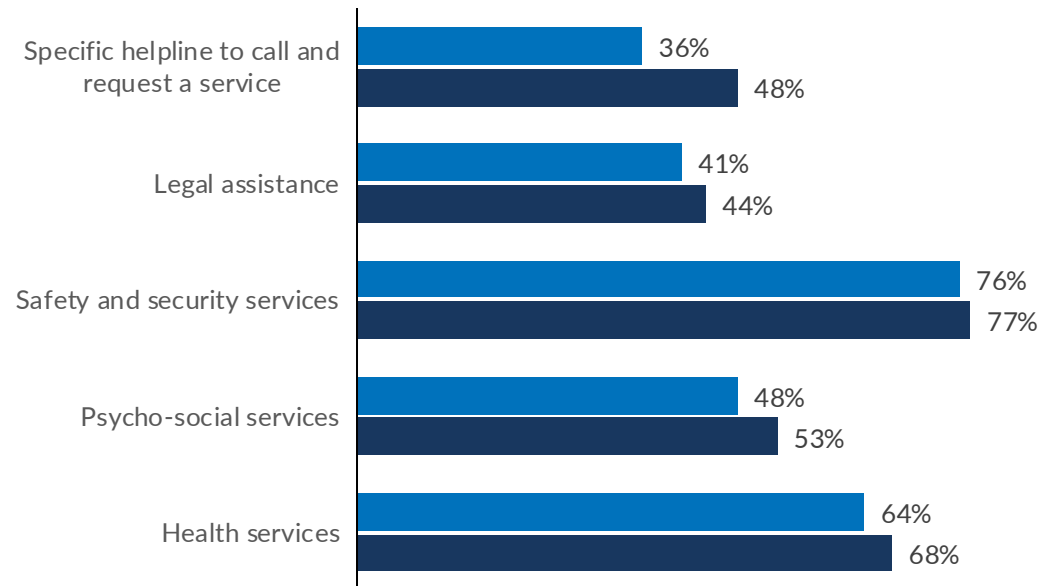
Compared to 2023, there was a slight decrease of the HH that are aware of reporting cases of violence and neglect against children to the police. For the NGOs, the question in 2024 was worded slightly differently than in 2023 where NGOs and helplines were separate options of answer.

Most refugees would report violence directly to the **police (84%)**, followed by **NGOs (14%)** and **governmental services (9%)**. Moreover, 6% of HHs are not aware where to report these cases.

% of respondents who know how to access GBV services

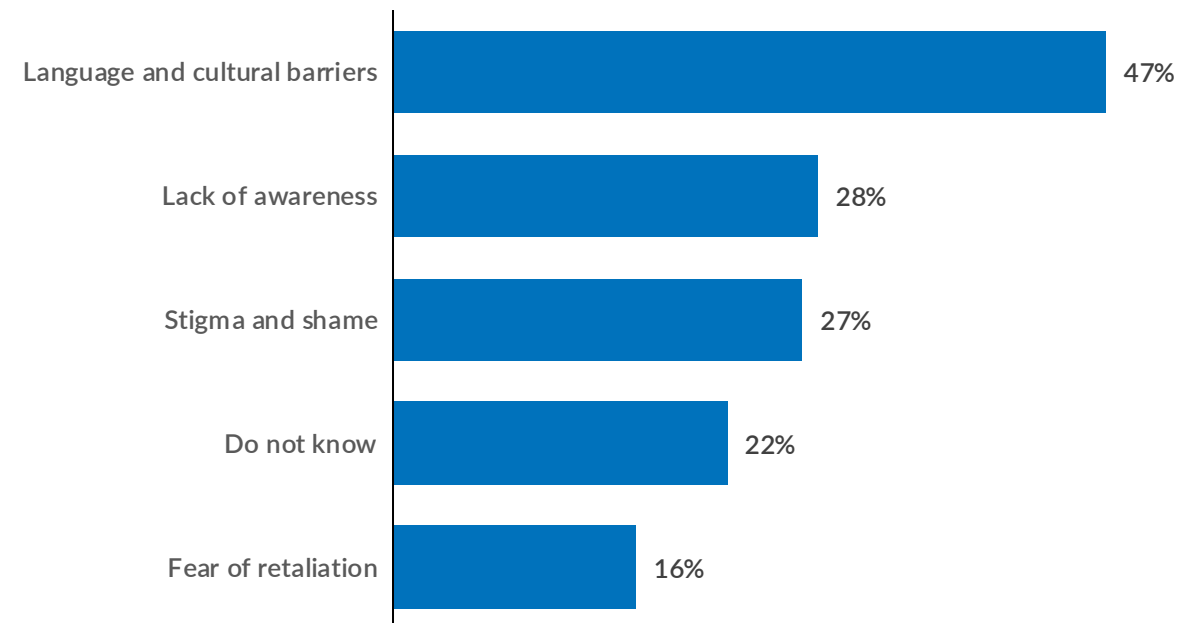
N=1008

■ 2023 ■ 2024



Top 5 perceived barriers for accessing GBV services (MCQ)

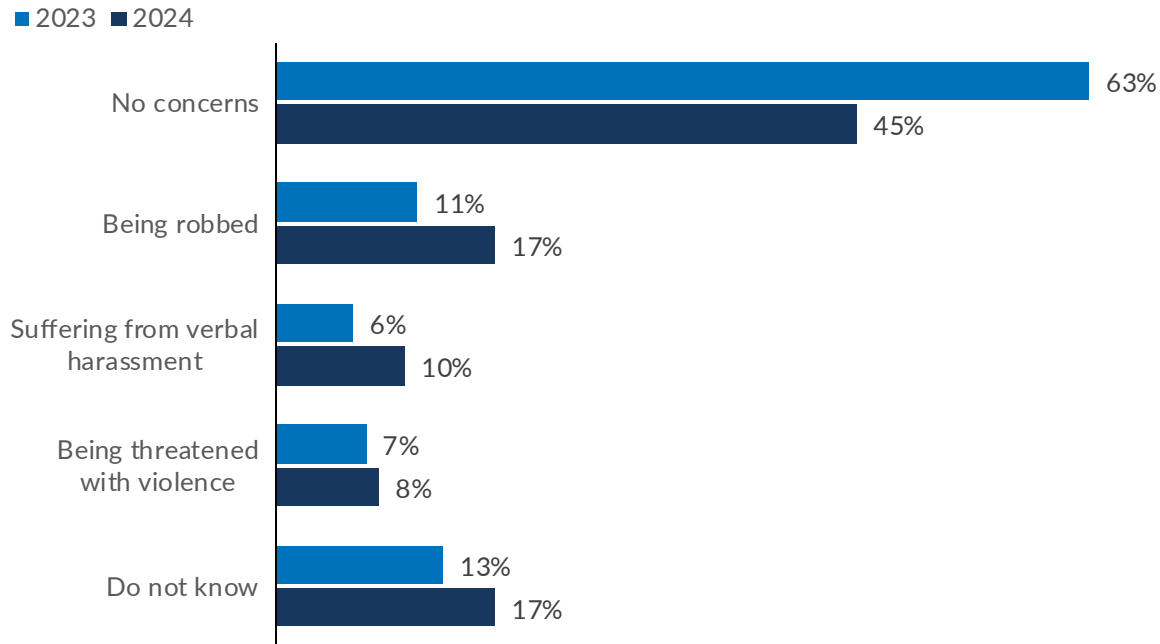
N=1008



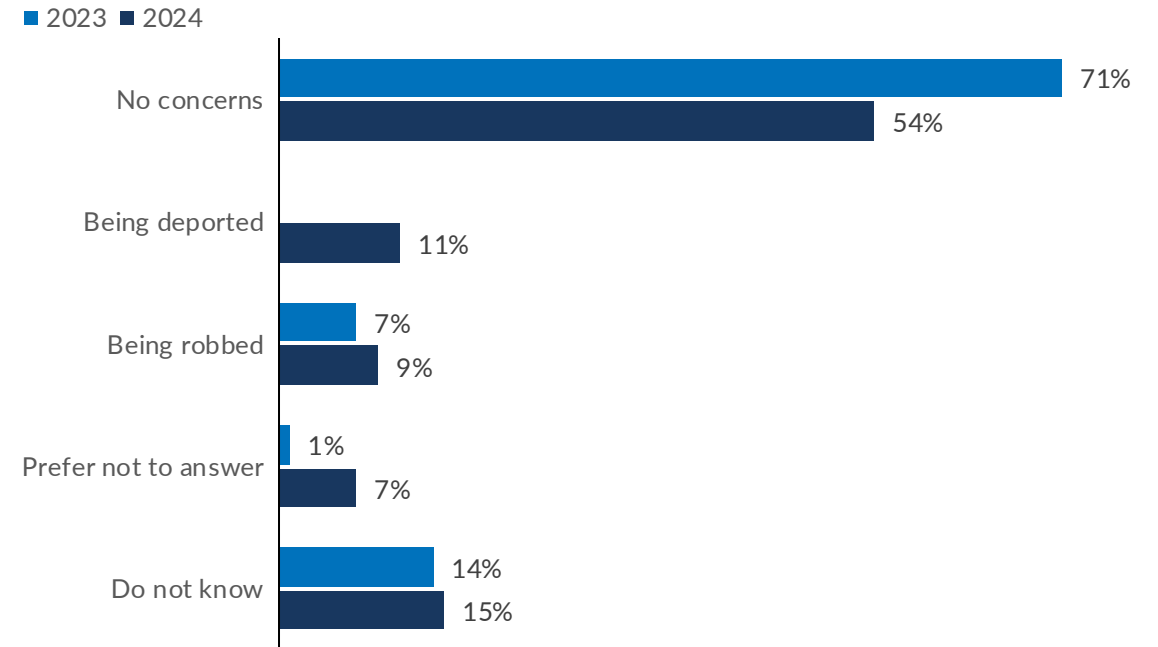
Knowledge of accessing GBV services did not change significantly in 2024 compared to 2023. Most respondents are most familiar with **health services (68%)**, as well as with **safety and security services (77%)** including police, **psycho-social services (53%)**, to call **specific helplines and request for services (48%)**, and to request **legal assistance (44%)**.

The top five perceived barriers for accessing GBV services in 2024 remained quite similar to the ones identified in 2023, with **language and cultural barriers** being the greatest barrier (47%), followed by **lack of awareness (28%)**, **stigma and shame (27%)**, and **fear of retaliation (16%)**. In 2023, **lack of perceived need, insufficient awareness and language barriers** were the most important reasons.

Top five main safety and security concerns for women in the area of residence (MCQ) | N=978



Top five main safety and security concerns for men in the area of residence (MCQ) | N=448



While an important percentage of respondents indicate for 2024 that **both men and women have no safety and security concerns**, there are more refugees with various concerns in 2024 than 2023, as a potential overrepresentation of the vulnerable groups in the sample.

For women, the top three safety concerns are being robbed (17%), suffering from verbal harassment (10%) and being threatened with violence (8%). This percentages are similar to 2023. 17% of respondents chose the “Do not know” option.

For men, their primary concerns reflect the introduction of the new mobilization law, with deportation being primary concerns (11%). Other concerns for men remain similar to the ones observed last year: being robbed (9%) and suffering from verbal harassment (5%). Similarly, 15% of respondents chose do not know option.

% of HHs satisfied with the aid received in the last three months

N=1008



Among the **60 respondents that were dissatisfied with the aid programmes**, **37** mentioned the cash programmes, **28** the humanitarian distribution of non-food items, **19** the governmental housing programmes and **14** the financial vouchers.

The question allowed the choice of multiple of answers. However, the findings may not be statistically robust as the results are based on a small sample size.

Among the **60 respondents that were dissatisfied with aid received**, 35 did not receive the aid on time, 26 found that the assistance received was not what the household needed and 8 considered the assistance insufficient. Moreover, 13 considered the services of being of poor quality.

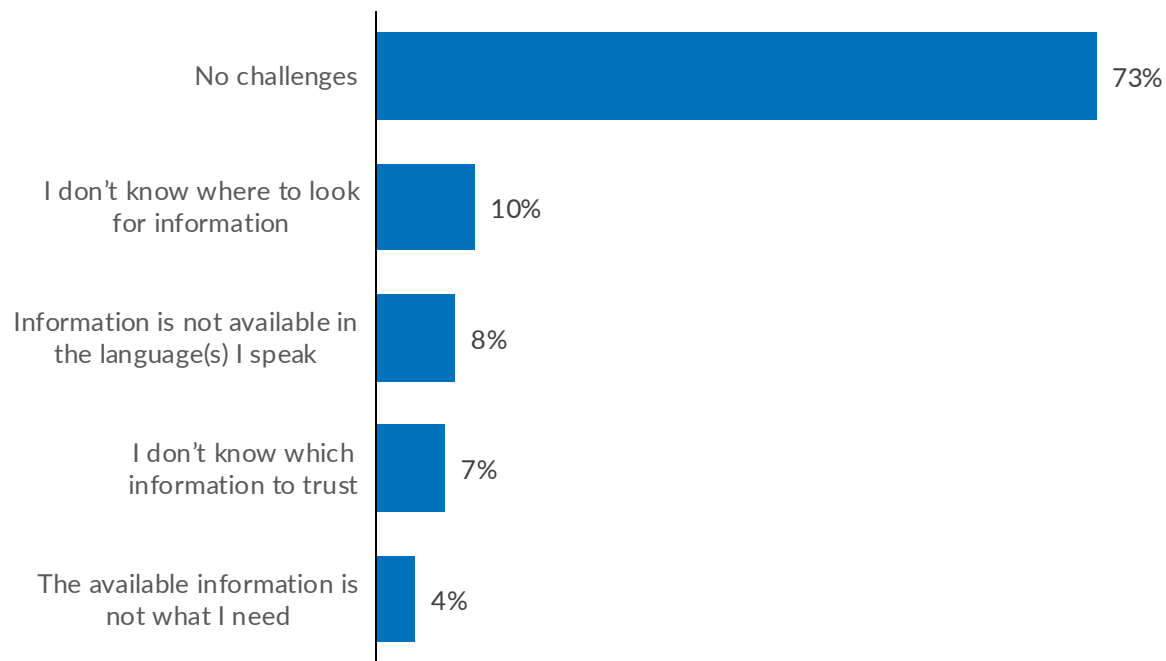
The question allowed the choice of multiple of answers. However, the findings may not be statistically robust as the results are based on a small sample size.

40% of HHs received aid in the last three months.

Based on results of SEIS 2024, 40% of the respondents declared that they received different types of aid, which is 10% less comparing with 2023. Out of this 40%, 16% (60 respondents) are dissatisfied with the aid received.

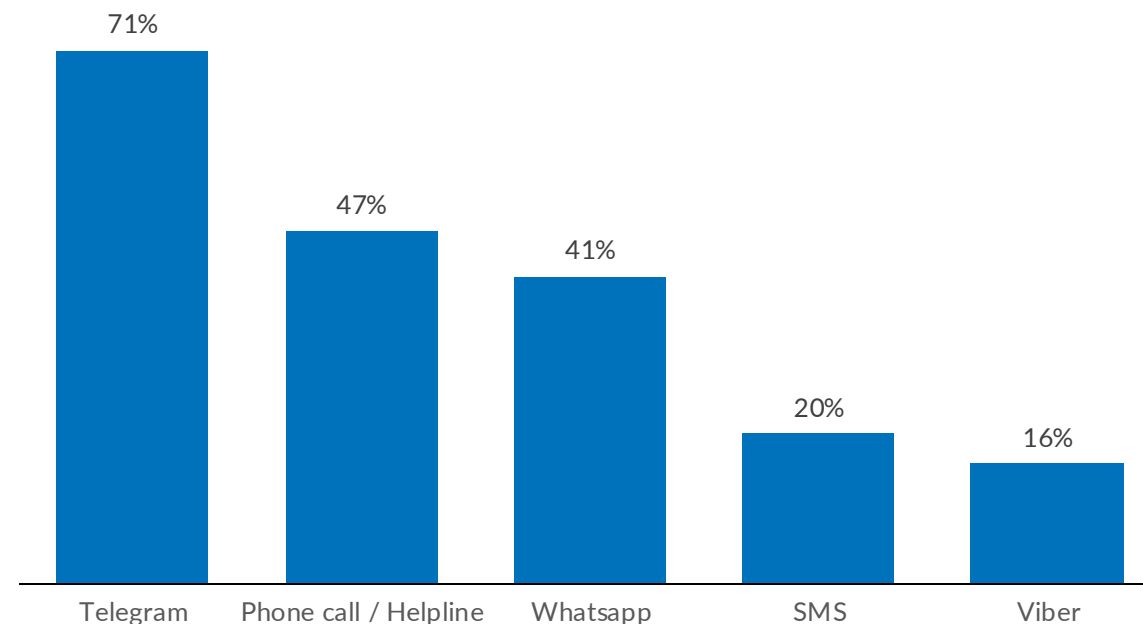
Top five challenges faced in accessing information (MCQ)

N=1008



Top five preferred means of receiving information (MCQ)

N=1008

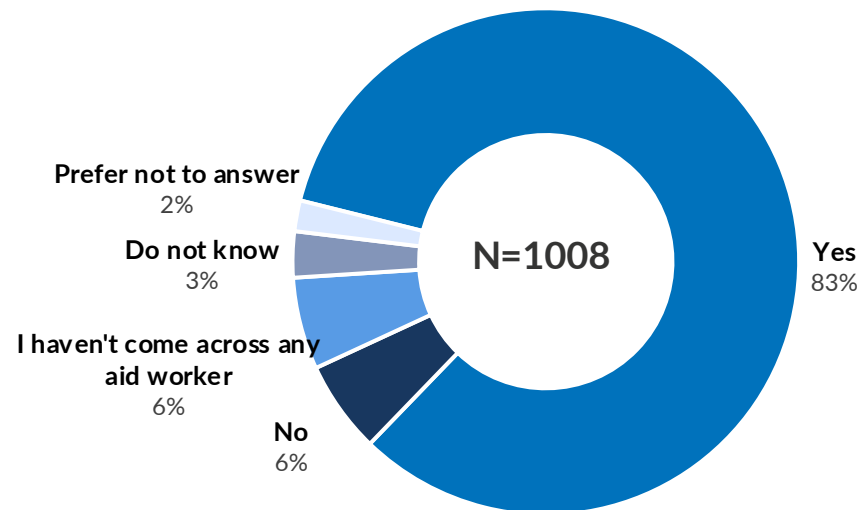


When asked about the challenges faced in accessing information, **73% of respondents indicate there were no issues in this aspect.**

However, 10% of respondents indicate that refugees still do not know where to look for information or the information is not available in the language they speak (10%). Similar to 2023, the most preferred channels of receiving information remain Telegram, phone calls and WhatsApp. Moreover, official channels of information, such as governmental ones, are at the bottom of the list, being preferred only by 7% of respondents due to aspects related to convenience and trust.

In 2024, the large majority of HHs (85%) are satisfied with aid workers' behavior in the area they reside and only 6% reported being dissatisfied.

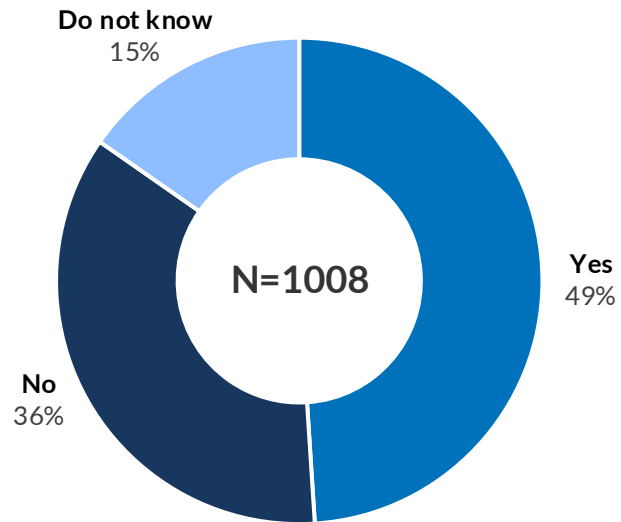
% of HHs satisfied with aid workers behavior in the area



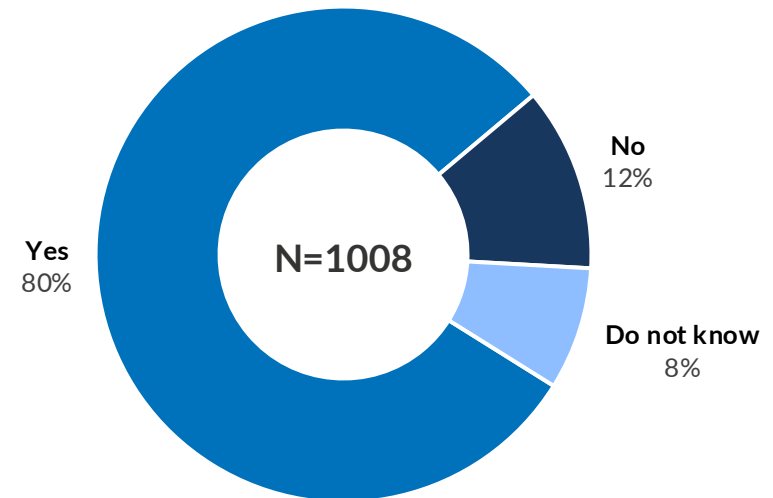
Among the **59 respondents that were dissatisfied with the behaviour of the aid worker**, **21** indicate that the aid workers do not speak their language, **18** declared they were not informed by their entitlements, **11** consider that aid workers show lack of empathy and **7** find the feedback they give as being useless, because nothing changes. The question allowed the choice of multiple of answers.

However, the findings may not be statistically robust as the results are based on a small sample size. As reasons for dissatisfaction in 2023, the lack of respect for the recipients' cultures, disrespectful interactions and insufficient aid were the main reported aspects.

% of HH aware where to report inappropriate behavior from aid worker



Access to the safe and confidential feedback and reporting community-based mechanism

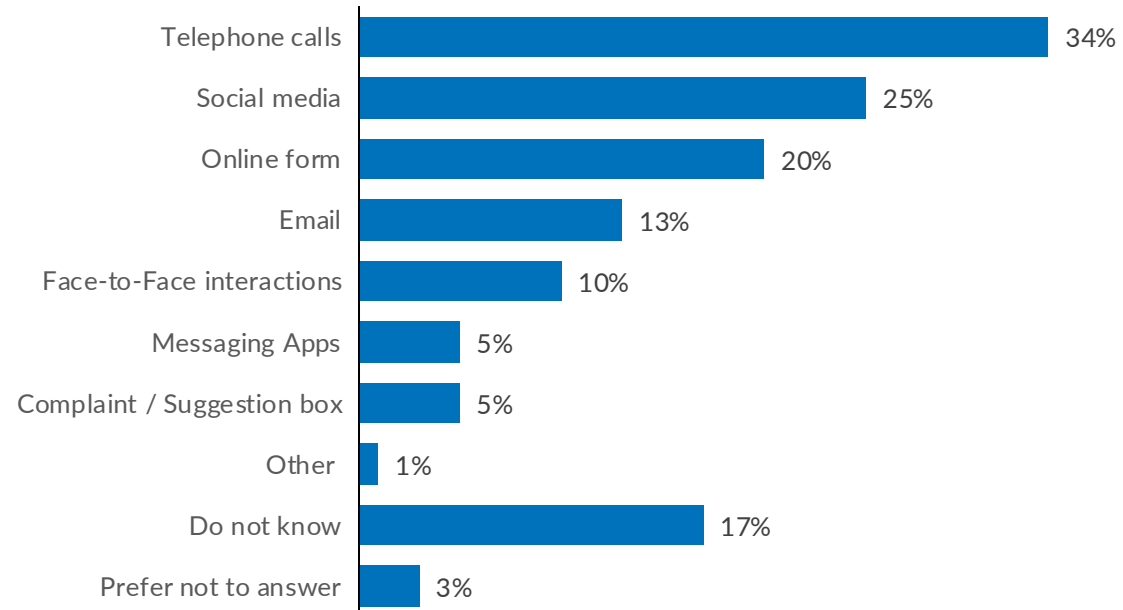


When asked about the awareness of where to report aid workers' inappropriate behavior, only around half of the respondents know where to go.

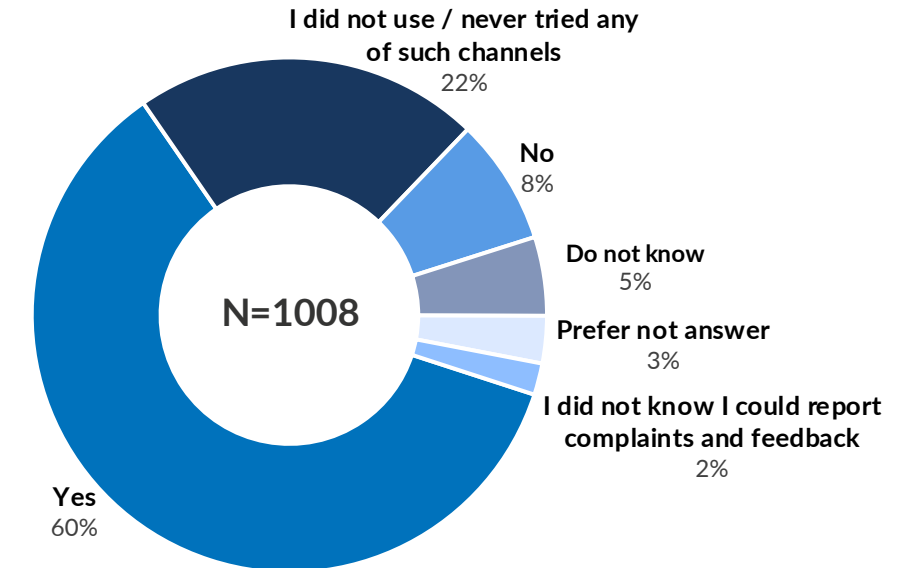
However, 80% of the respondents indicate they have access to safe and confidential feedback and reporting community-based mechanisms. This data indicates there is a need for more awareness measures and instruments that would increase refugees' knowledge on the possibility to report aid workers' inappropriate behavior.

% of preferred channels to offer feedback to aid organizations about the inadequate behavior of aid workers (MCQ)

N=1008



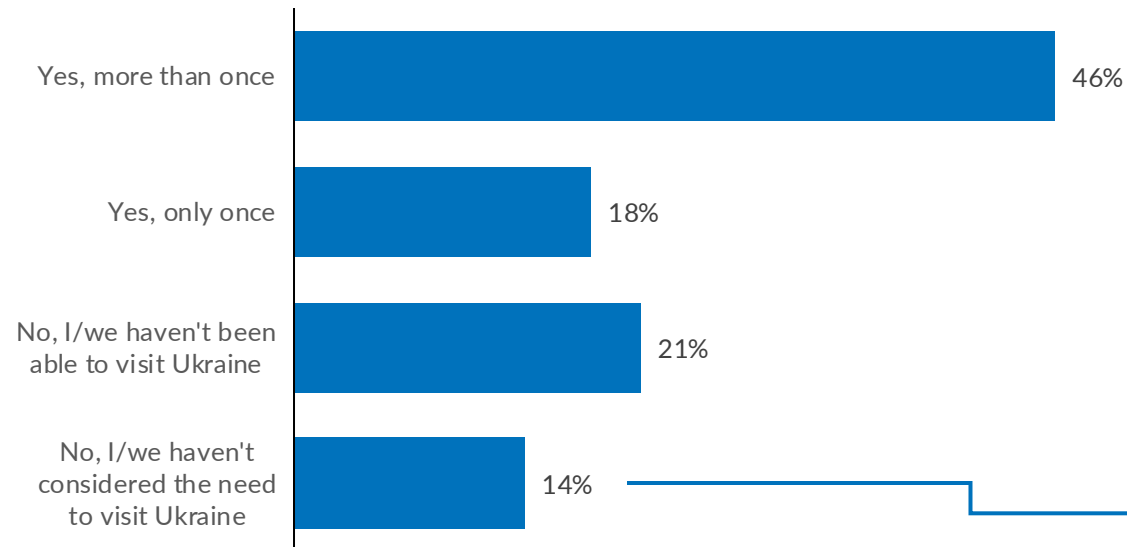
Protection concerns reported received an appropriate response



Among the most preferred channels of offering feedback, **telephone calls (34%), social media (25%) and online forms (20%)** are the top three preferences. Moreover, **60%** of the respondents mentioned they received an appropriate response after addressing protection concerns.

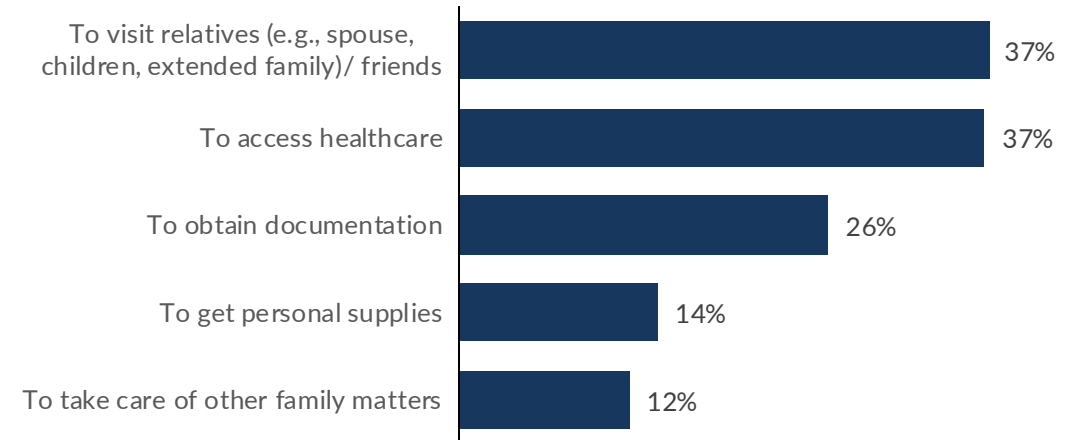
% of HHs where one or more members has been back to visit Ukraine

N=1008



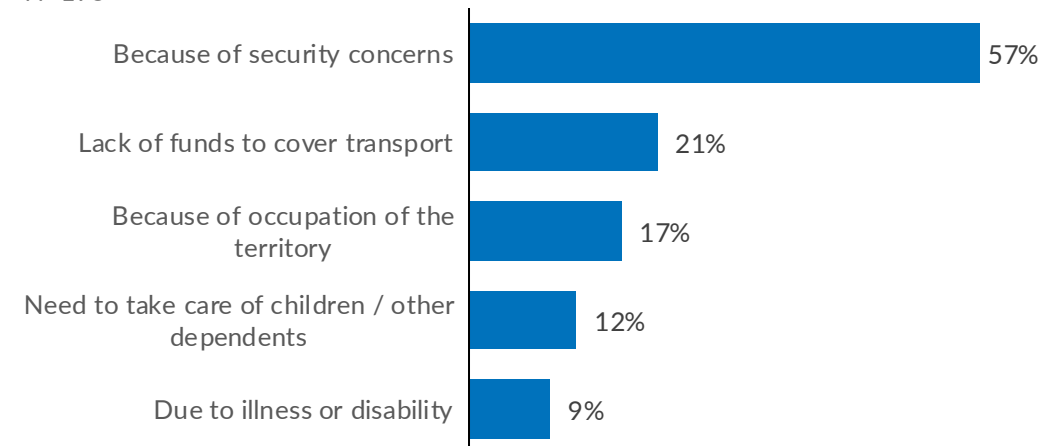
Top five reasons for visiting Ukraine

N=707



Top five reasons for not being able to visit Ukraine

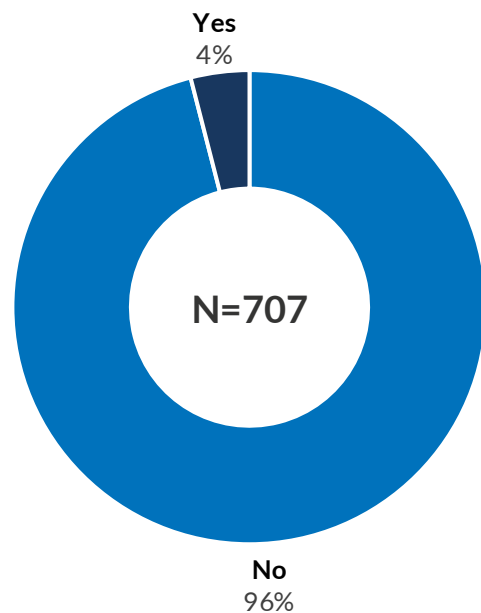
N=170



In 2024, many HHs indicated they had been back to Ukraine more than once (46%) or at least once (18%).

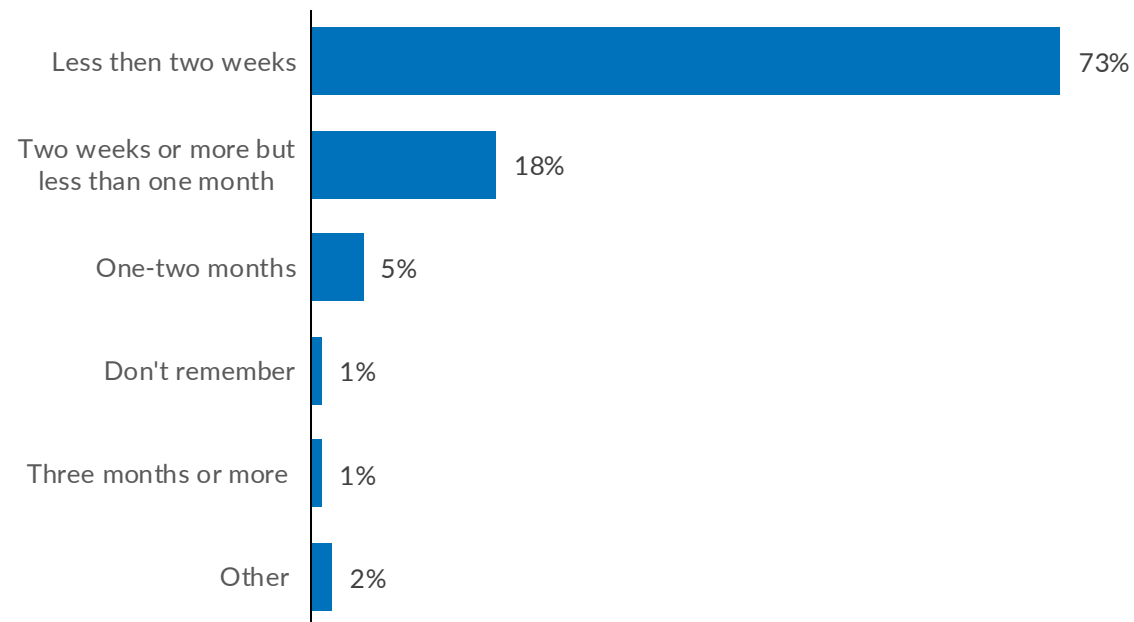
One in five HHs haven't been able to visit Ukraine (21%) or have not considered the need to visit Ukraine (14%). This data highlights the constant movements between Ukraine and the host country for the majority of the HH. The main reasons for not being able to visit Ukraine were security concerns (57%), the lack of funds to cover transportation (21%) and because of the occupation of the territory (17%).

% of HHs experiencing difficulties returning after visiting Ukraine



Average duration of stay in Ukraine during last visit

N=707



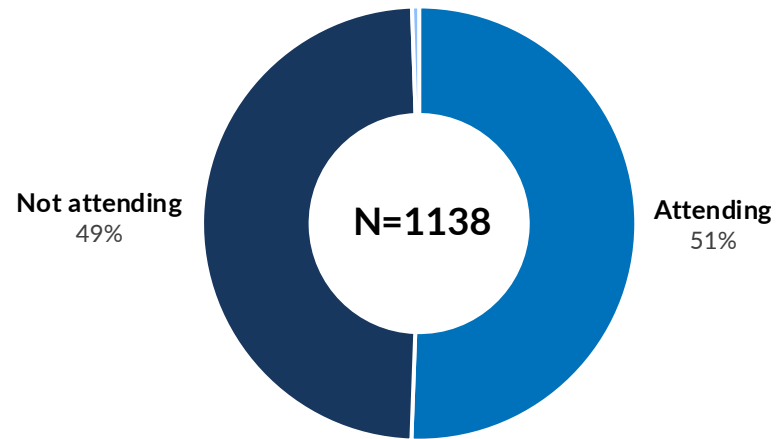
As per the sample, for almost all the HHs who have been back to Ukraine (96%) at least once, **there were no difficulties in returning after their visit**. Also, the average duration of stay during the last visit was less than two weeks (73% of the respondents) and 18% stayed between two weeks and one month.

Equally important, when asked about their intention to change their location within the next 12 months, most of the respondents (74%) declared they plan to remain in the same location, 17% do not know yet and the rest are considering either moving in other European country or to move to another city or return to Ukraine.

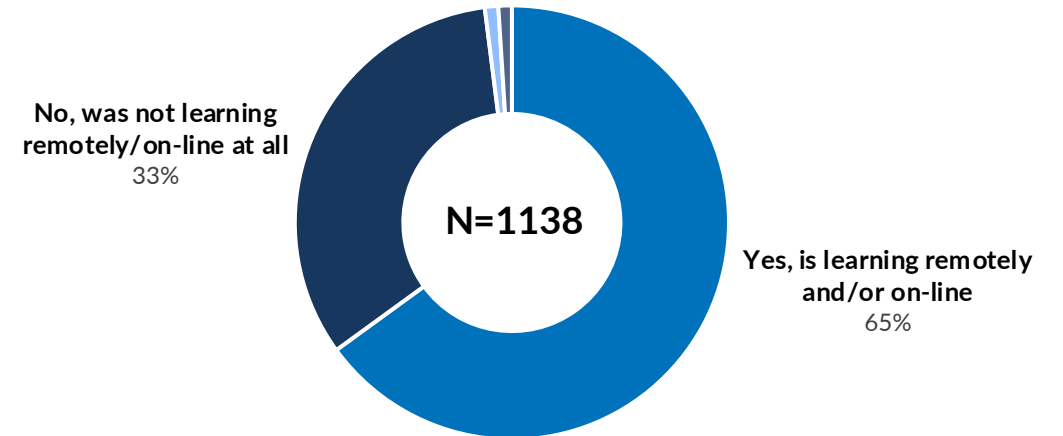


EDUCATION

% of school aged children reported attending 2023/2024 school year in host country national system



% of school aged children learning remotely or online in the 2023/2024 school year

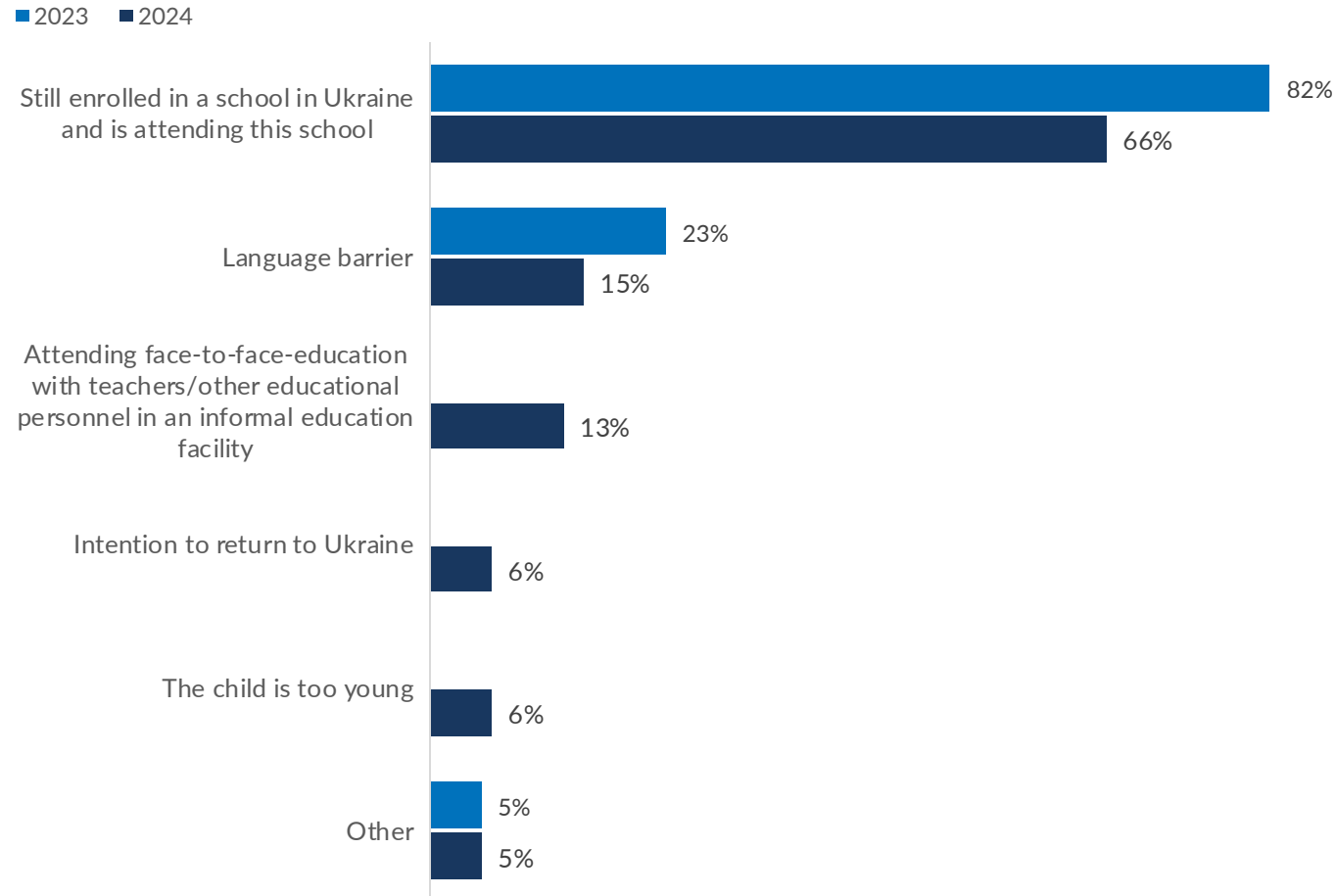


Considering the school age of 3-18, **51% of children were attending the national educational programs of the host country.** The percentage is higher than 2023 (40%) and similar to the expressed intention to enroll the child in the Romanian system (51%) for the 2023/2024 school year.

Moreover, 65% of school aged children are learning online, following the remote school system offered by the Ukrainian state. Out of the total number of children, around 10% are neither attending the Romanian national education system, nor the on-line Ukrainian system.

Primary reported barriers for enrolling children in school (MCQ)

N=449



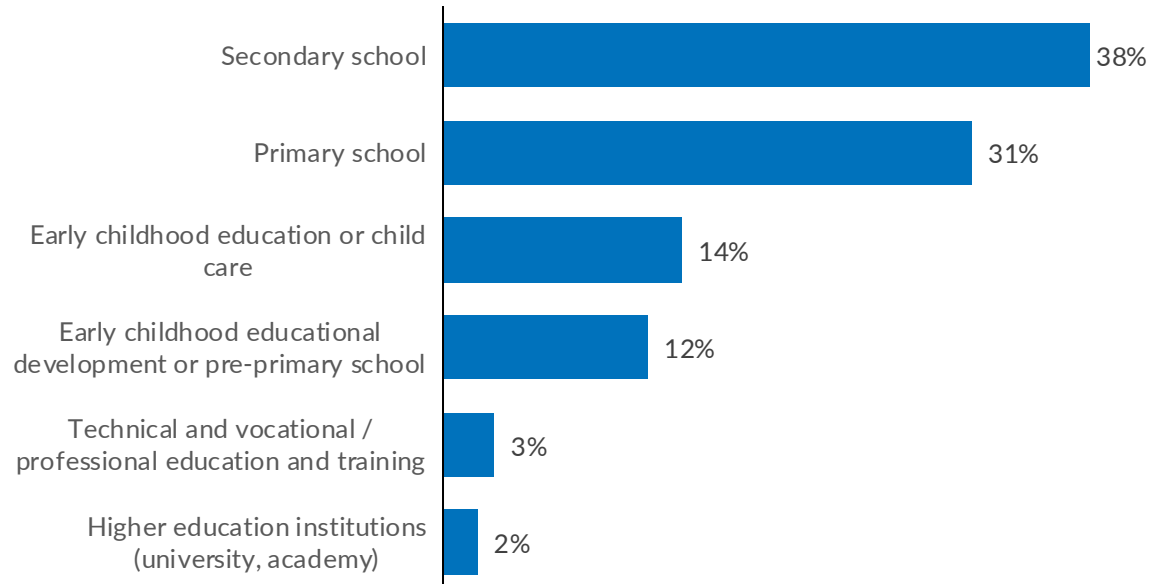
The primary reported reason for non-enrollment was the fact that the child was attending the Ukrainian distance learning programs (66%), a percentage that is decreasing in comparison to 2023 (82%).

One explanation resides in the changes of legislation from Ukraine, other may come from the intention of Ukrainians to remain for the next years in Romania.

The language barrier (15%) still remains an important barrier, but it decreases significantly from 23% in 2023. Other reasons include the educational services offered in informal spaces - attending face to face education with teachers in an informal education facility outside of the education system (13%) and the child is too young to be enrolled (6%).

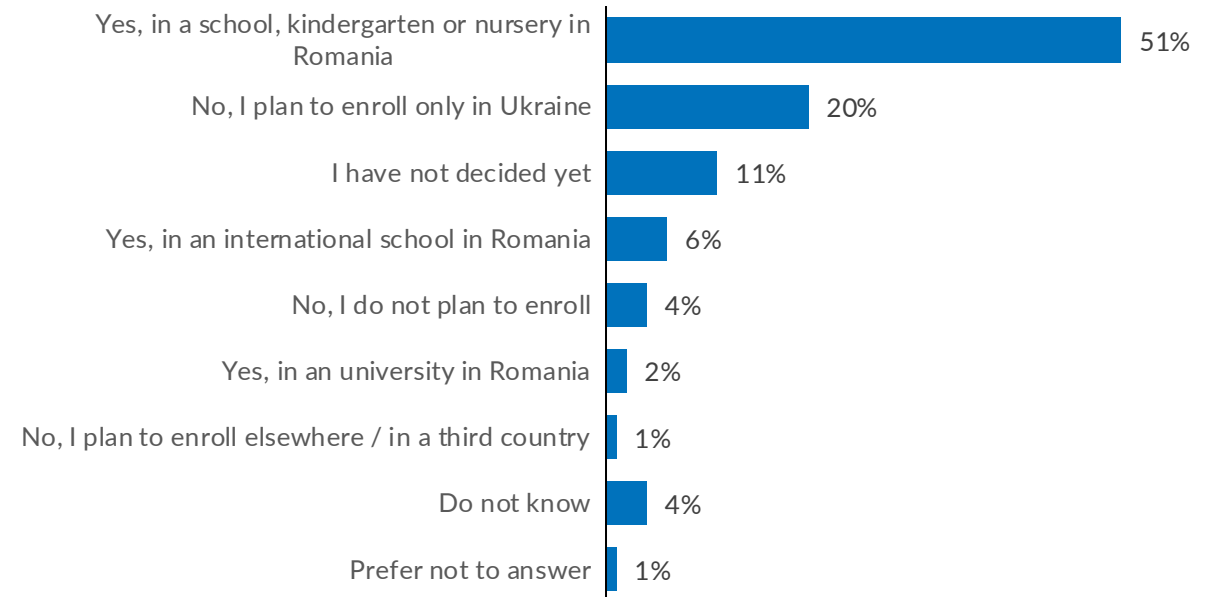
Last level of education attained during school year 2023/2024

N=575



Intention to enroll the child to the formal education system in Romania, in 2024/2025

N=1138

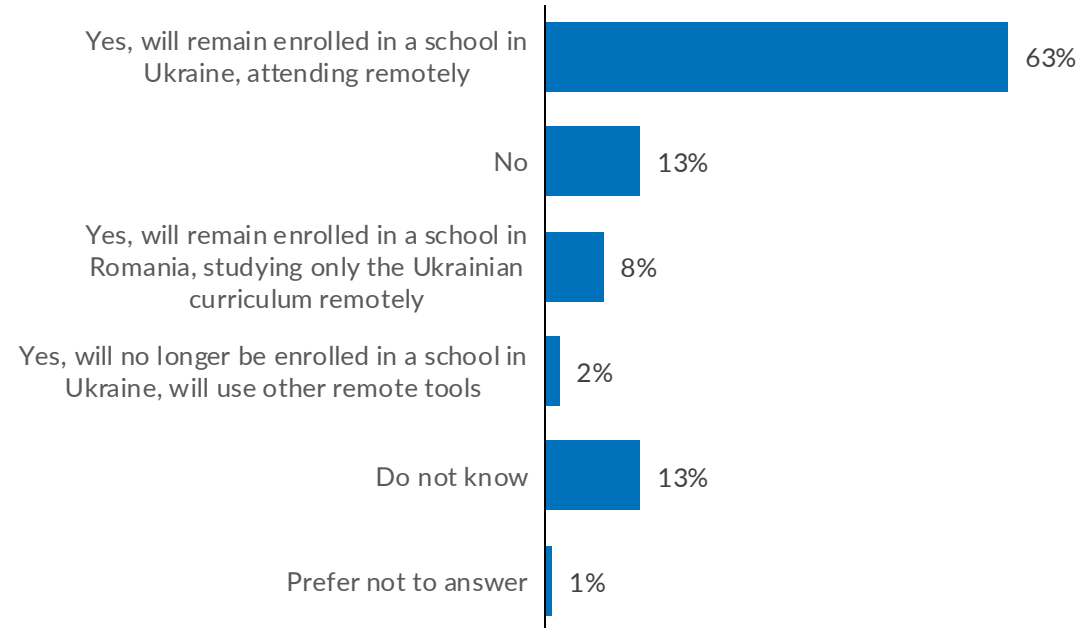


For the school year 2023-2024, as per the ones that declared attending the Romanian national system, 95% of school aged children were either enrolled in early childhood education programs or attained primary and secondary education.

This data indicates that most of the school aged children are under 14 , therefore their educational needs are complex, from early childhood programs to secondary education. Moreover, over 50% of the caregivers intend to enroll their children in the formal educational system in the 2024/2025 academic year, similar to the values recorded in 2023.

% of school aged children that will continue online/remotely learning in the school year 2024/2025

N=765



Type of remote or online learning programs

N=765

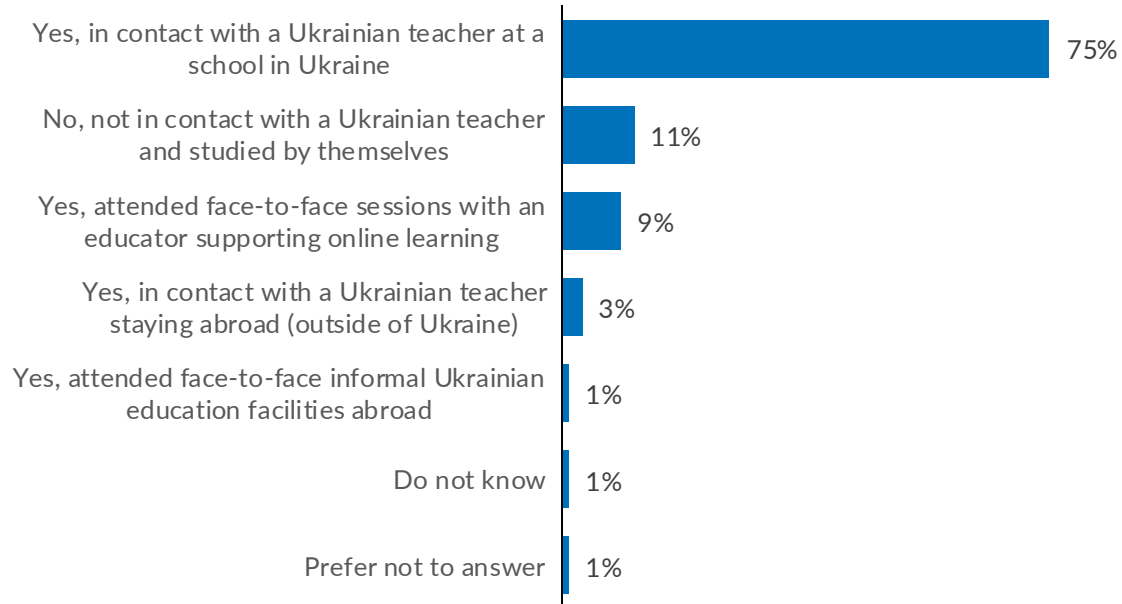


Similar to 2023, 63% of the school aged children will continue the Ukrainian remote educational track in the 2024/2025 school year and 8% will both remain enrolled in Romania and continue the Ukrainian online track.

When asked about the remote and online learning programs, as per the sample, 40% of children are using other online teaching methods than the All-Ukrainian online platform, 30% are using the All-Ukrainian online platform and 21% are enrolled in Romanian and are just taking the Ukrainian classes that are different in the curriculums. These data indicate that even in the context of online learning, only 30% of school aged children are using only the All-Ukrainian online school platform, while others are mixing diverse learning methods, platforms and curriculums.

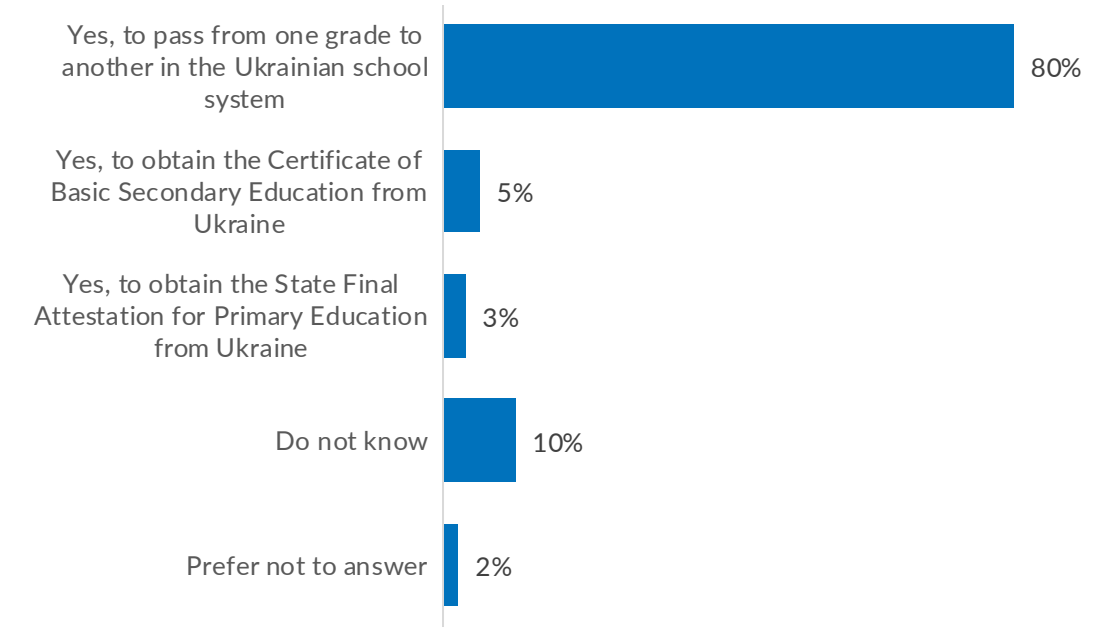
% of school-aged children studying under the supervision of a qualified educator from Ukraine

N=765



% of school-aged children participating in exams, tests or evaluations while learning remotely

N=765



From the school aged children that are attending the Ukrainian online school (in its various formats - see previous graphs), 75% are in contact and supervised by a Ukrainian teacher from Ukraine and 9% person in contact with a Ukrainian teacher and educator in Romania.

Moreover, 80% of the school aged children participated in exams or test to pass from one grade to another in the Ukrainian school system and 5% to obtain the Certificate of Basic Secondary Education. This data indicates the attachment and desire to continue the Ukrainian education track, even in parallel with the Romanian national education system.



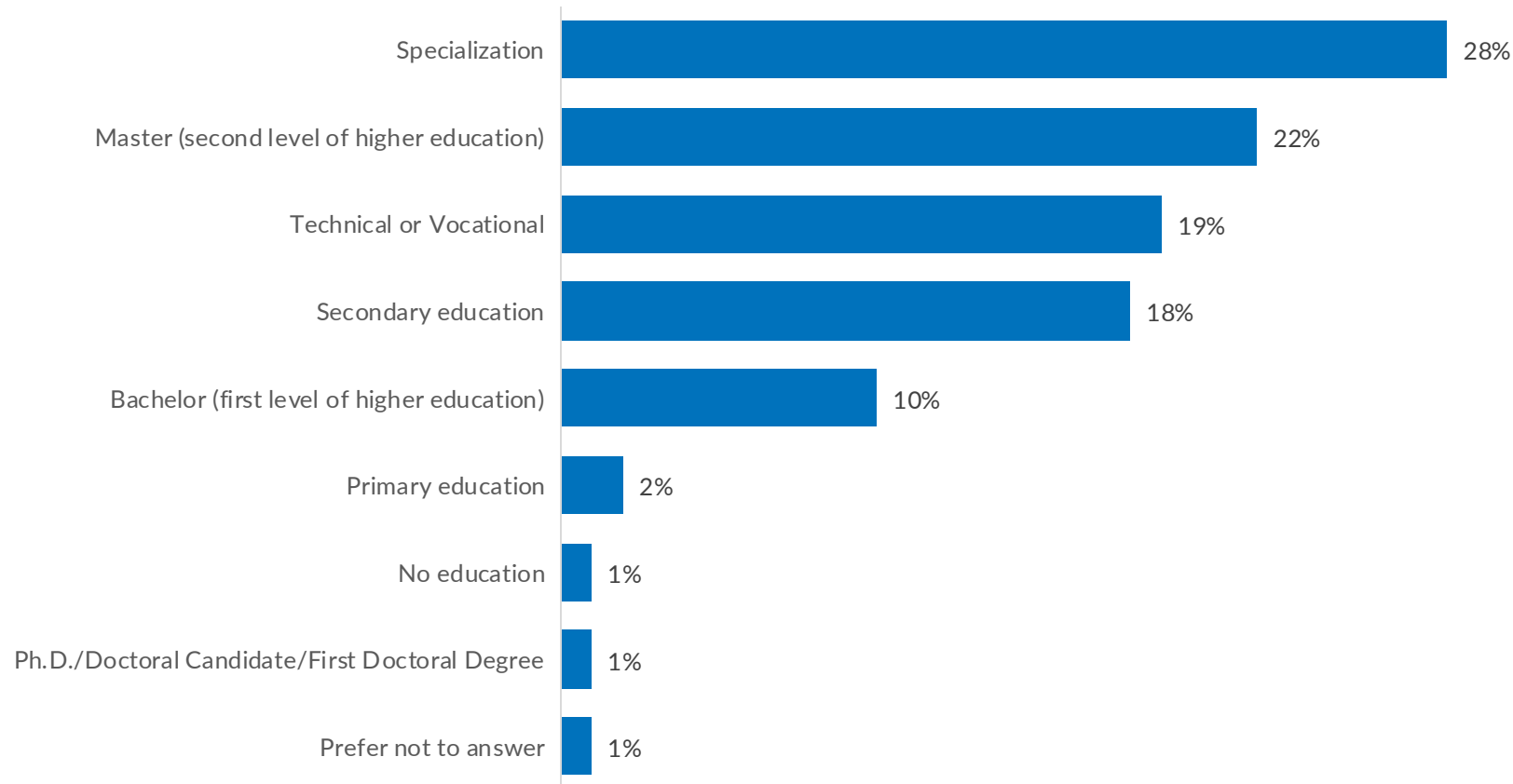
SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

Education Level

Share of HH members by highest education level achieved

N=1540



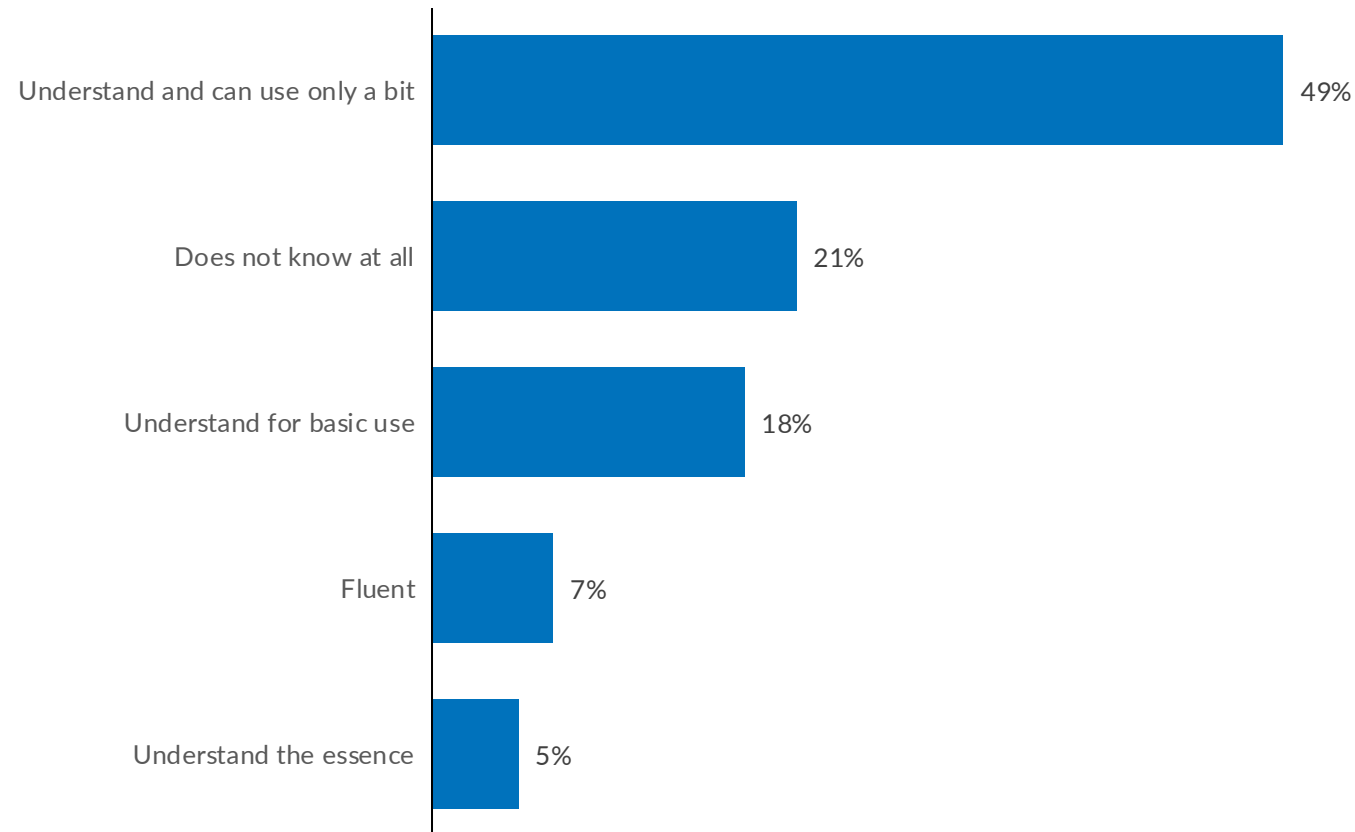
Most respondents have achieved a **bachelor's diploma or higher (61%)**, with **28%** holding a **specialization degree**, **22 %** having a **master's diploma** and **10%** holding a **bachelor's degree**. Another **19 %** are holding a **technical degree**. A specialization is a form of tertiary education specific to Ukraine that, since 2014, has been equated with master's degree.

SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

Education Level

Knowledge of the local language

N=1540

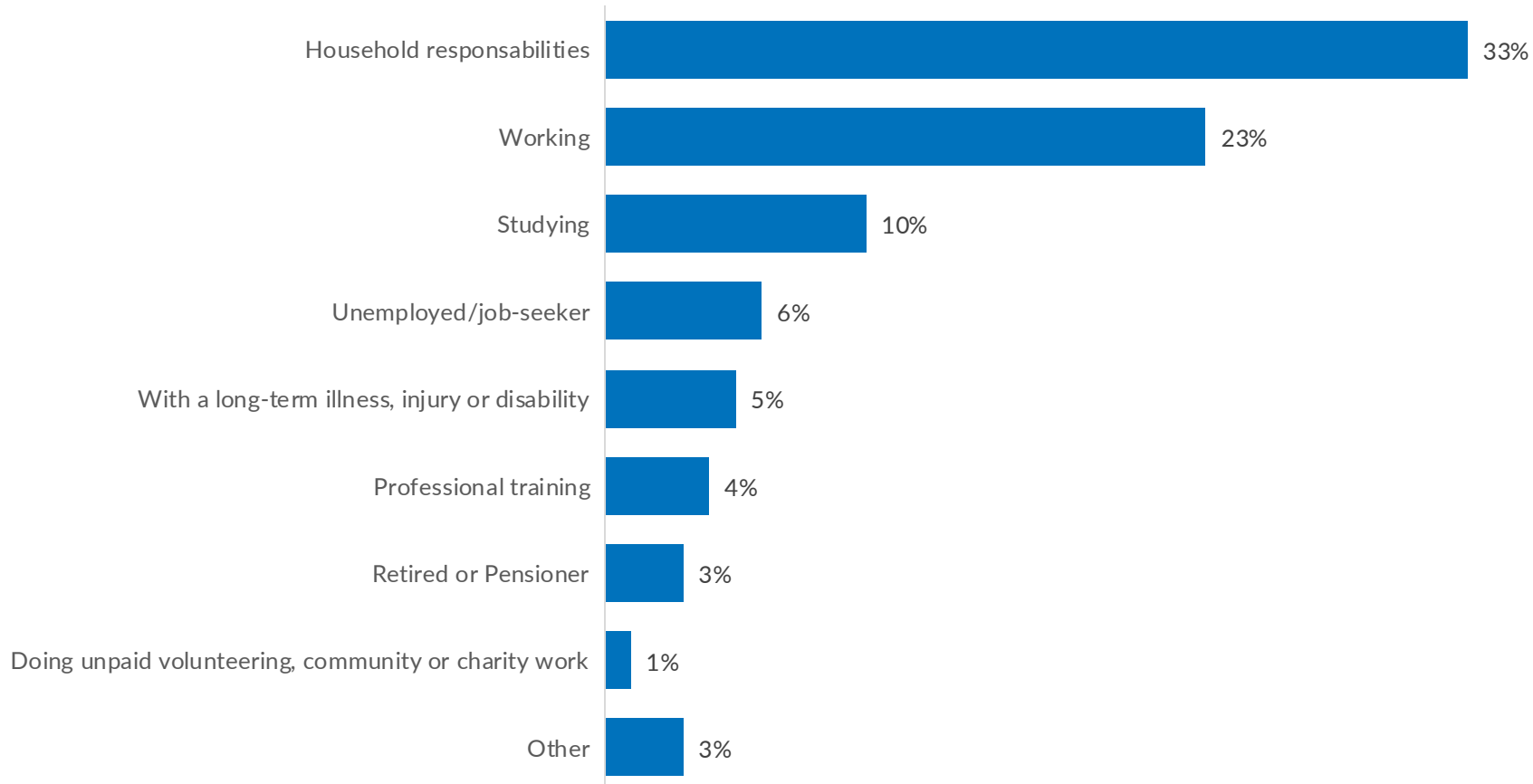


Most respondents have a **basic or no knowledge of the local language (70%)**, while **only 12% have a more advanced knowledge of the local language**

SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

Main activity of Ukrainian citizens in host country

N=1548



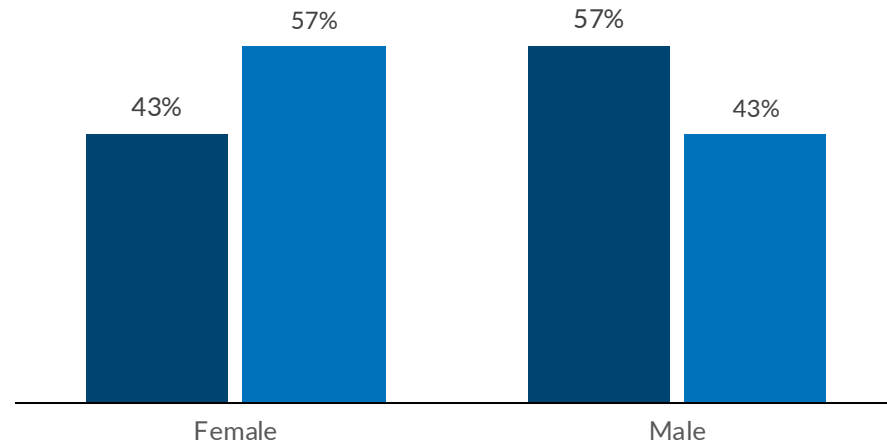
Out of the respondents of working age (16-62 in the case of women, and 16-65 in the case of men), **most are engaged in household responsibilities (33%), followed by 23% that are working, 15% are pursuing their studies, or looking for a job (8%).**

SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

Employment by gender

N=1372

■ Employed ■ Unemployed



Most respondents that are inside the labor market* are employed.

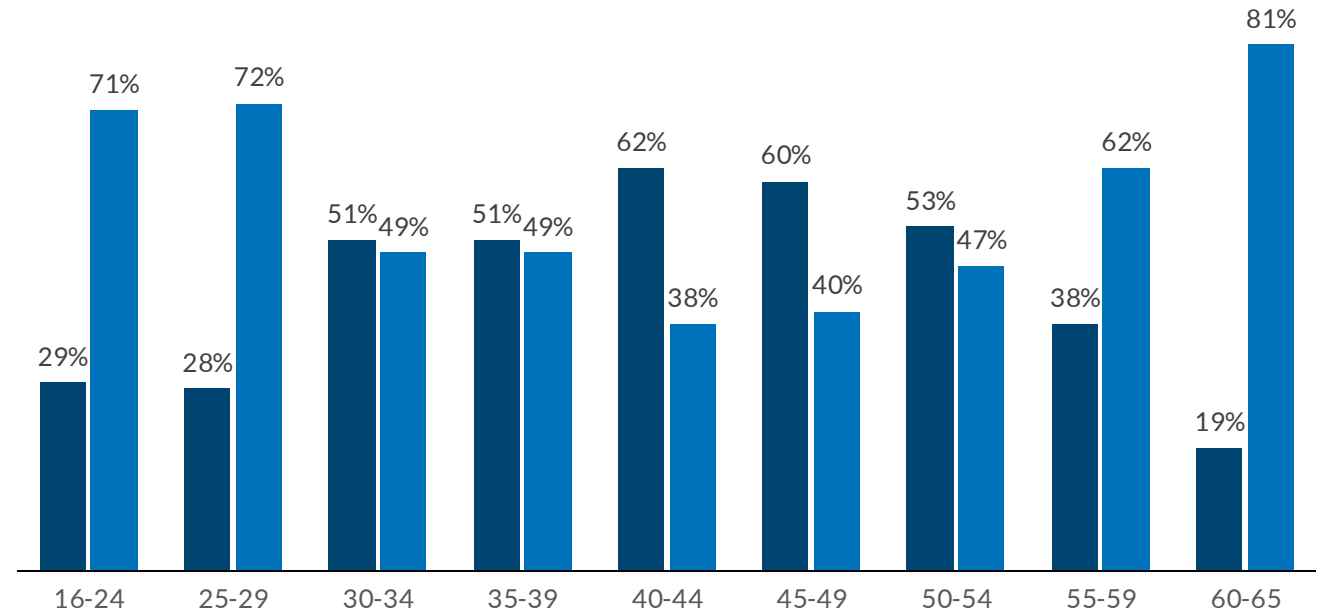
Employment is slightly higher in the case of men (57% compared to 43%). When disaggregated by age, the age group with the lowest employment rate is 60-65 years old (19%), while the age group with the highest employment rate is 40-44 years old.

* Are able to work and are either employed or unemployed.

Employment by age

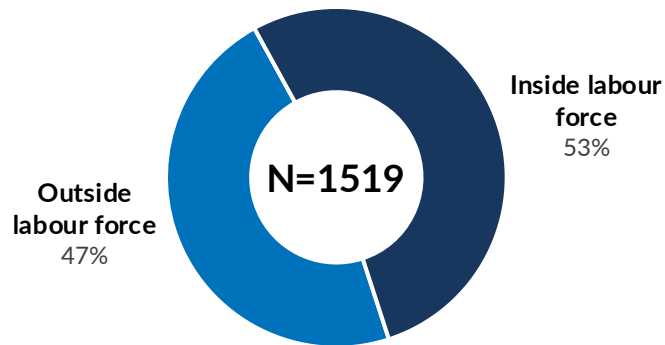
N=1372

■ Employed ■ Unemployed

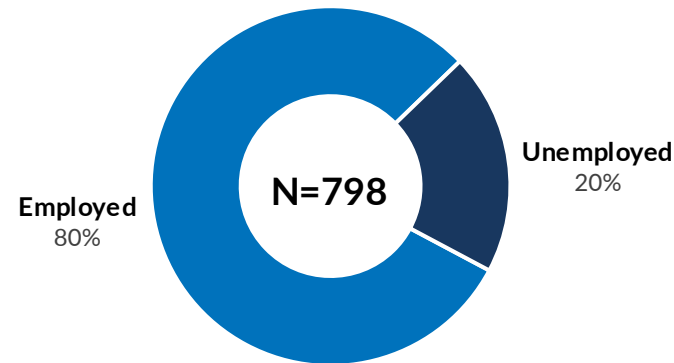


SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

Working age Ukrainian nationals by labor market integration



Respondents inside labor force



15%

% of youth (16 to 24) who are not in education, training or employment (NEET)

Outside labor force: Share of working-age individuals (who were not employed during the last week and will not be able to work for a short term if the possibility arises, or did not look for a paid job or did not try to start a business in the past month).

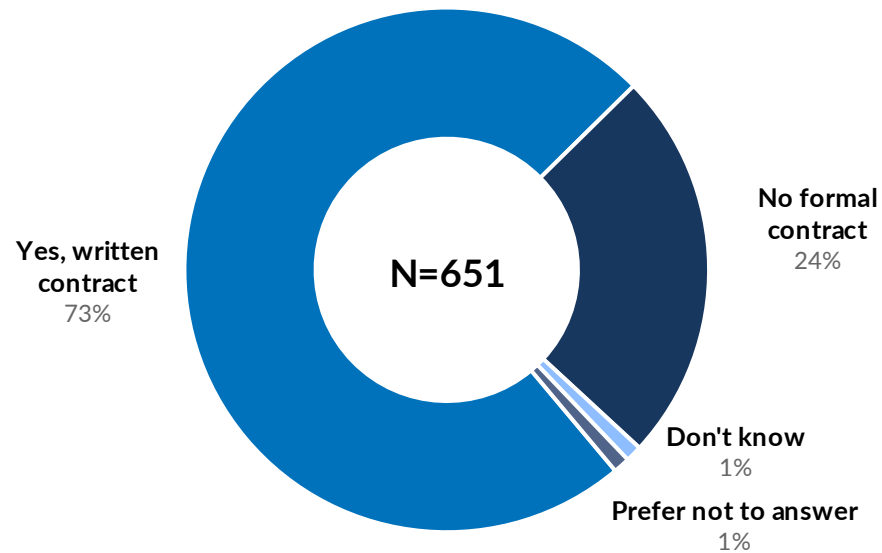
Inside labor force: Have the ability to work. They are either employed or unemployed

Employment: Includes individuals of working age who have engaged in income-generating activities in the past week. This encompasses formal employment, self-employment, agricultural/fishing work, diverse income generation, temporary absence from paid roles, and unpaid contributions to family businesses.

Unemployment: Share of working-age who were not employed during the past week (as per the definition above), who looked for a paid job or tried to start a business in the past month, and who are available to start working within the next 2 weeks if ever a job or business opportunity becomes available.

SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

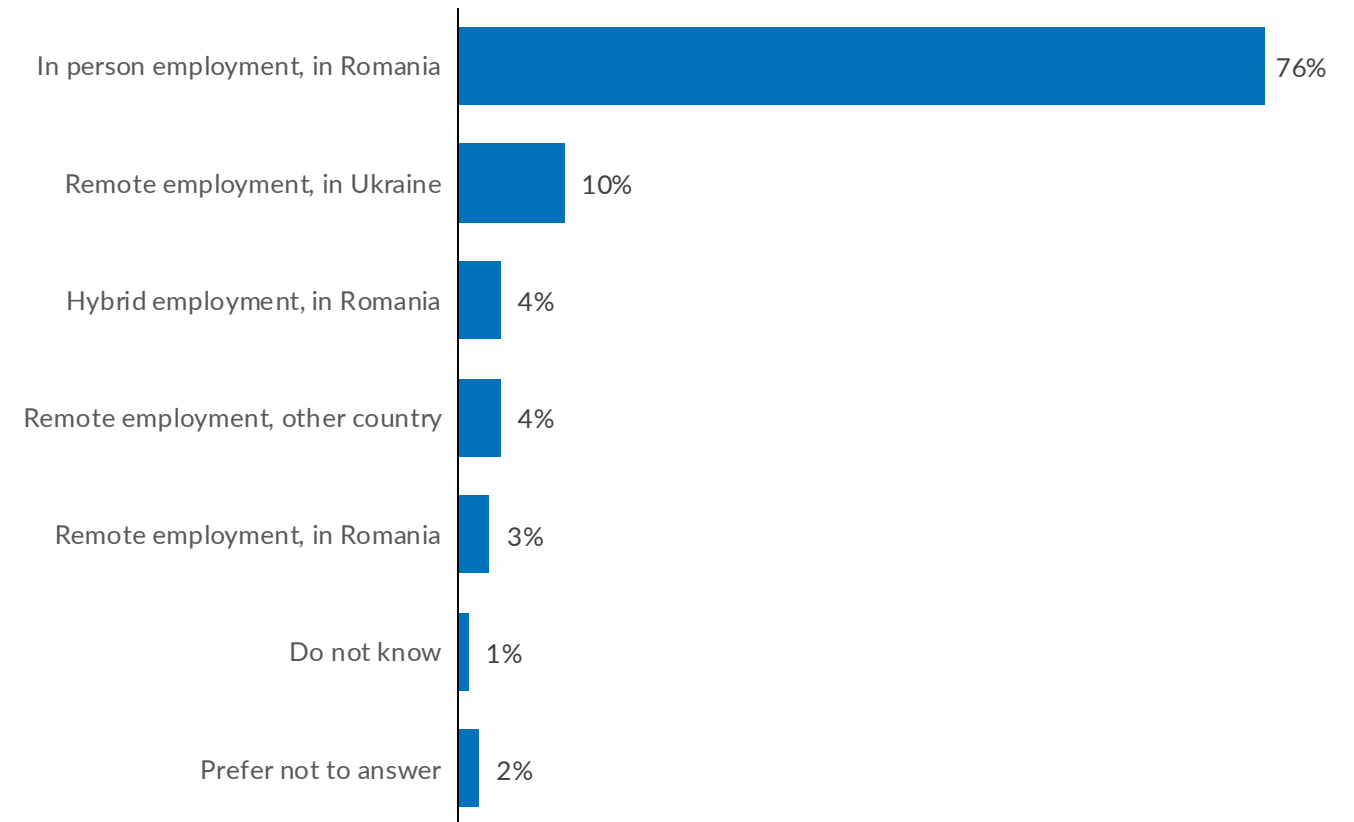
Employment with type of contract *



*Only written contracts registered in REVISAL (national registry of employment) are considered legal in Romania.

Work modality

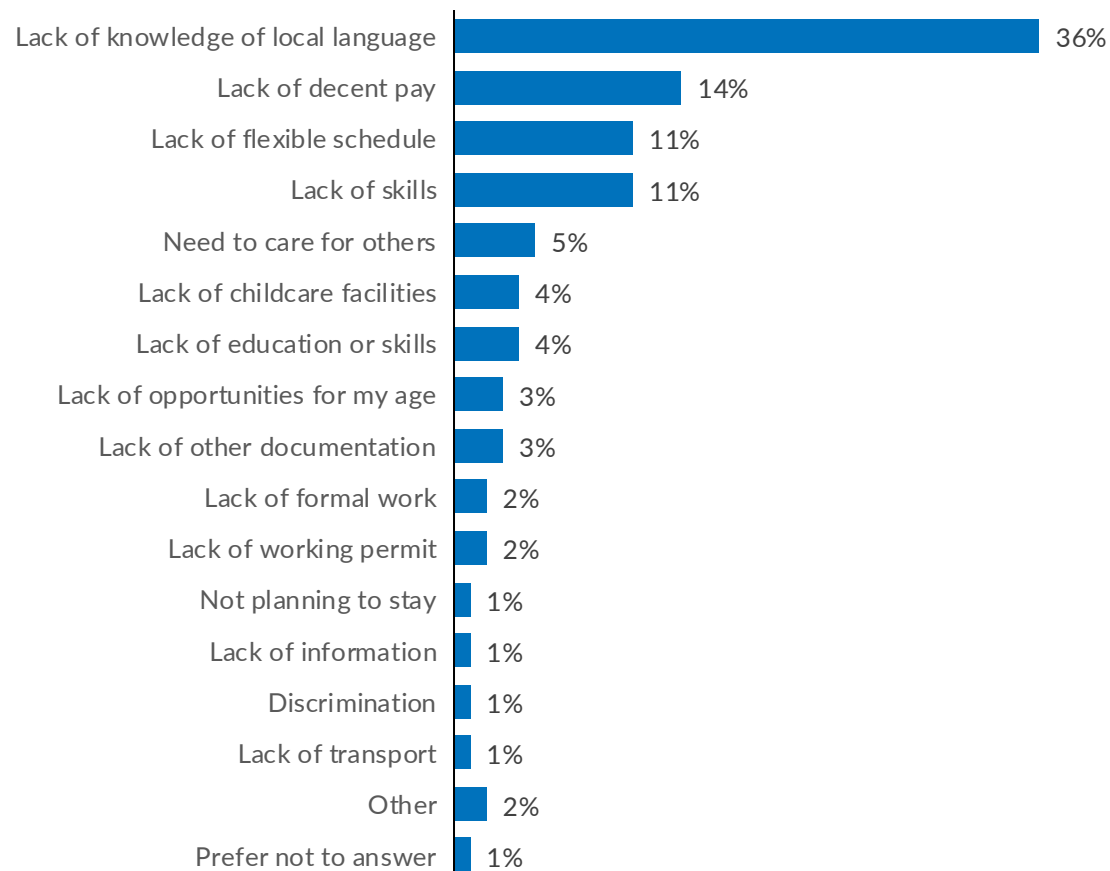
N=651



SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

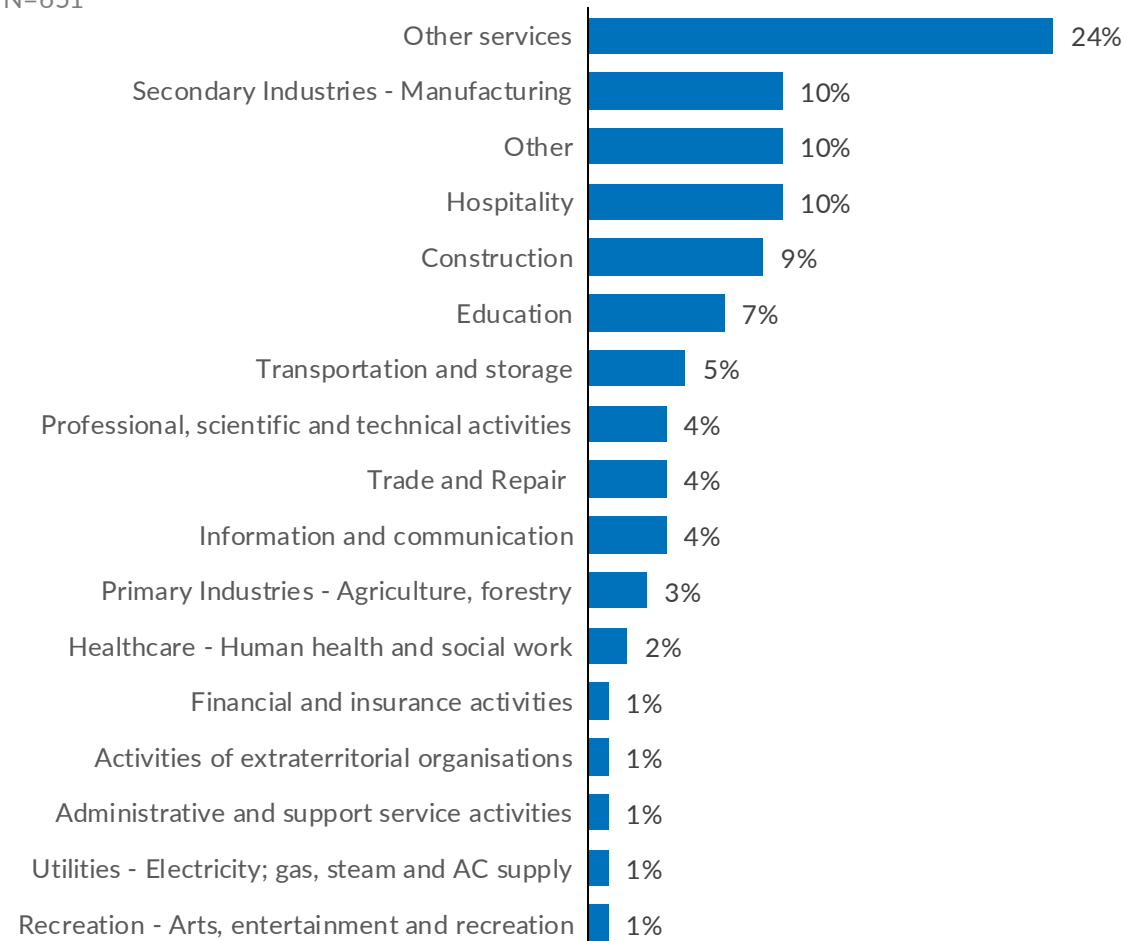
Employment barriers

N=1618



Sector of current employment in host country

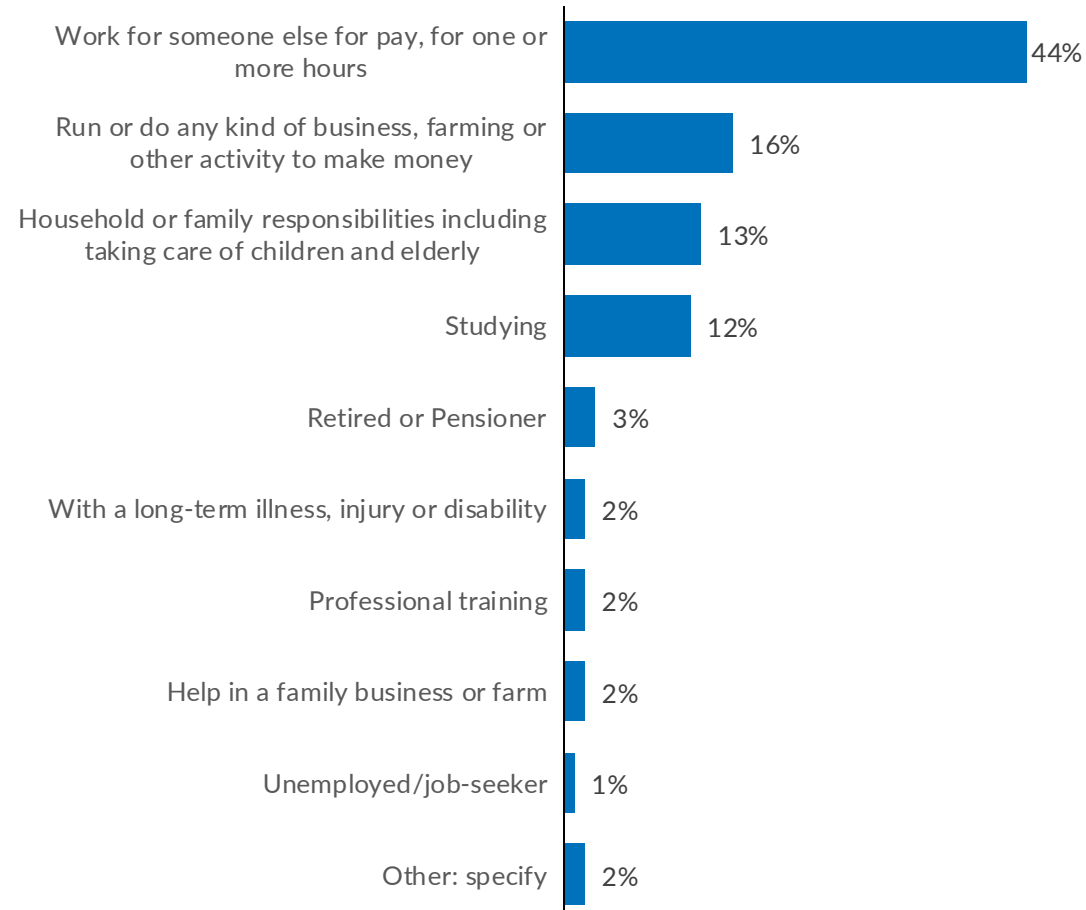
N=651



SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

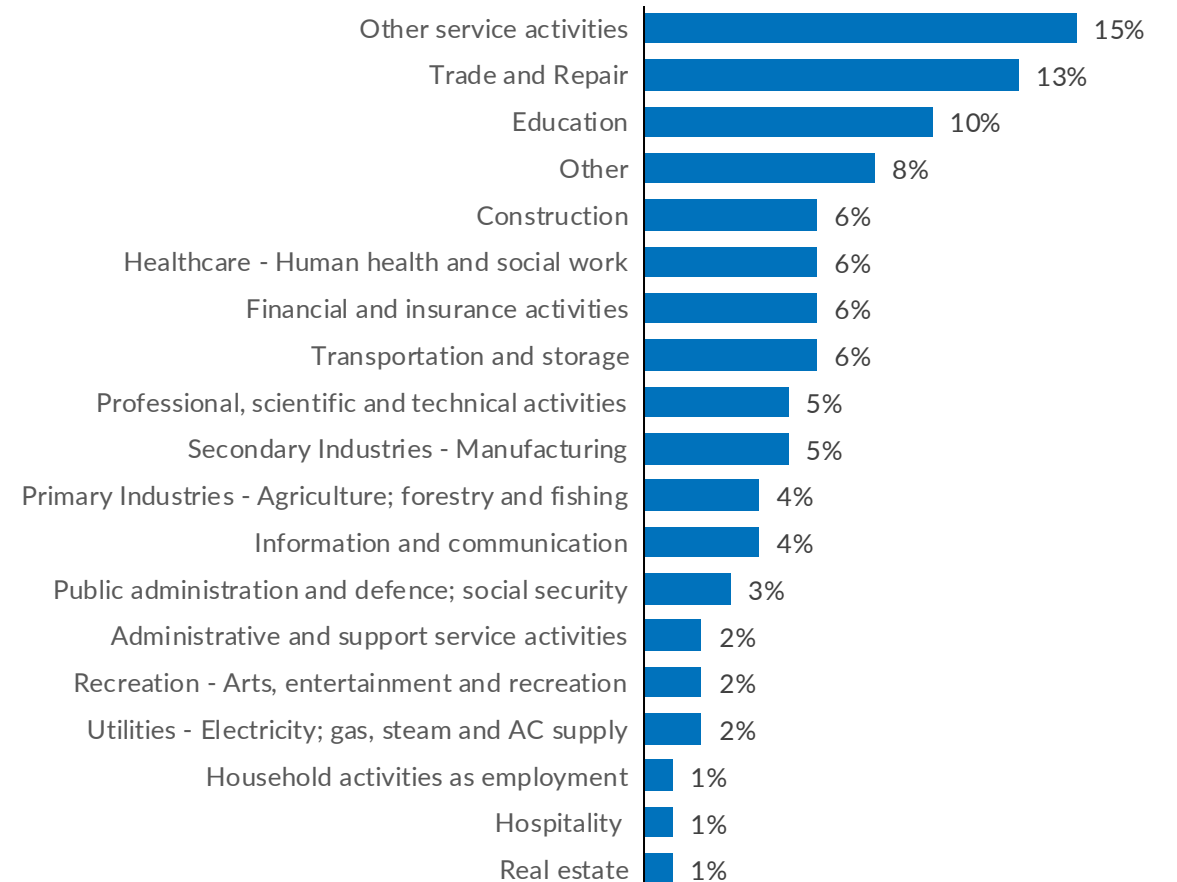
Main activity of working age respondents before displacement

N=1540



Sector of employment before displacement

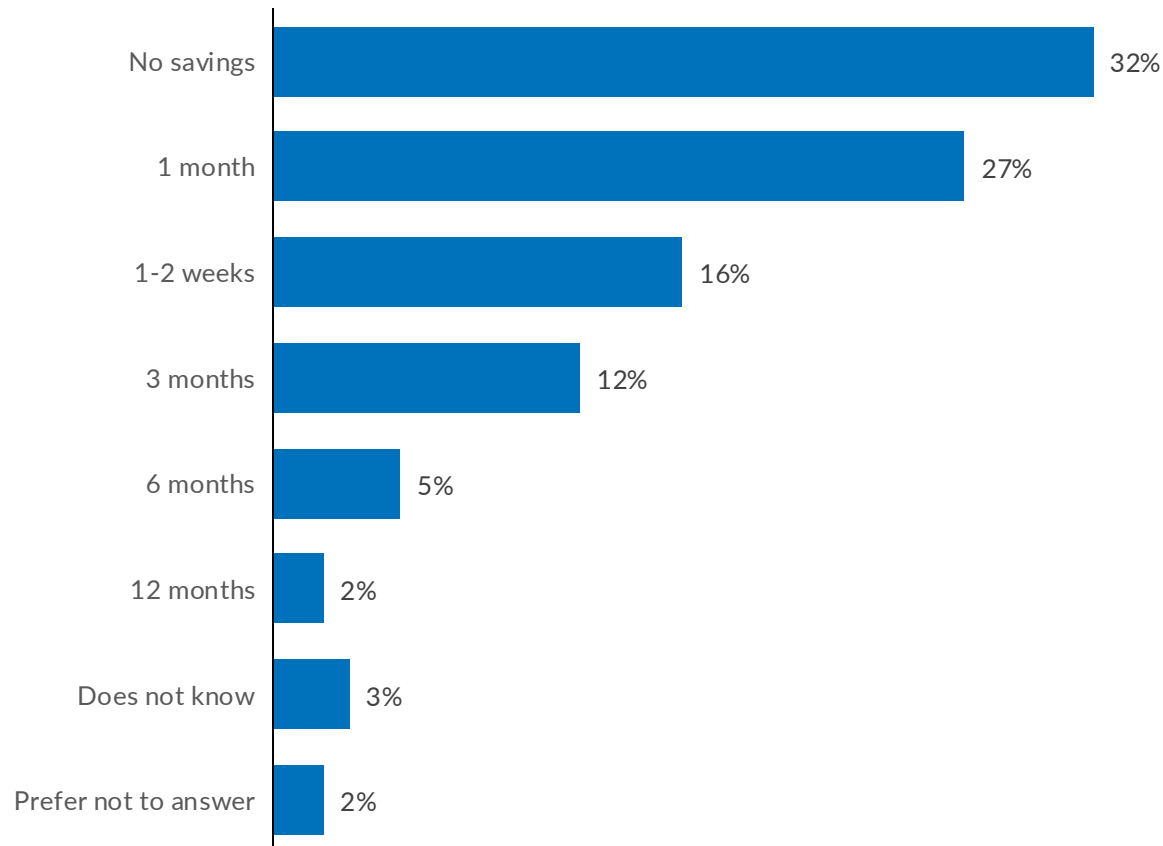
N=983



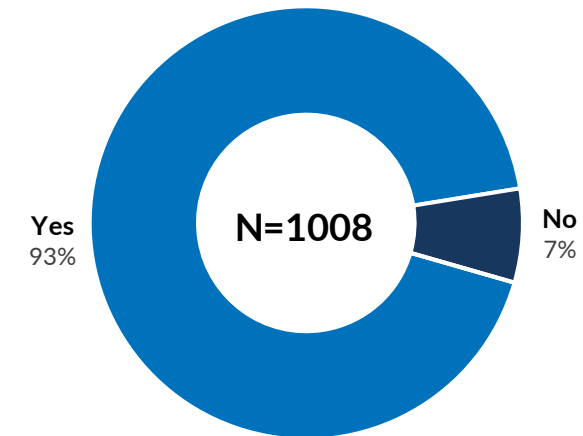
SOCIO-ECONOMIC INCLUSION & LIVELIHOOD Savings

% of HH by the perceived period of reliance on savings

N=1008



% of HH with a bank account



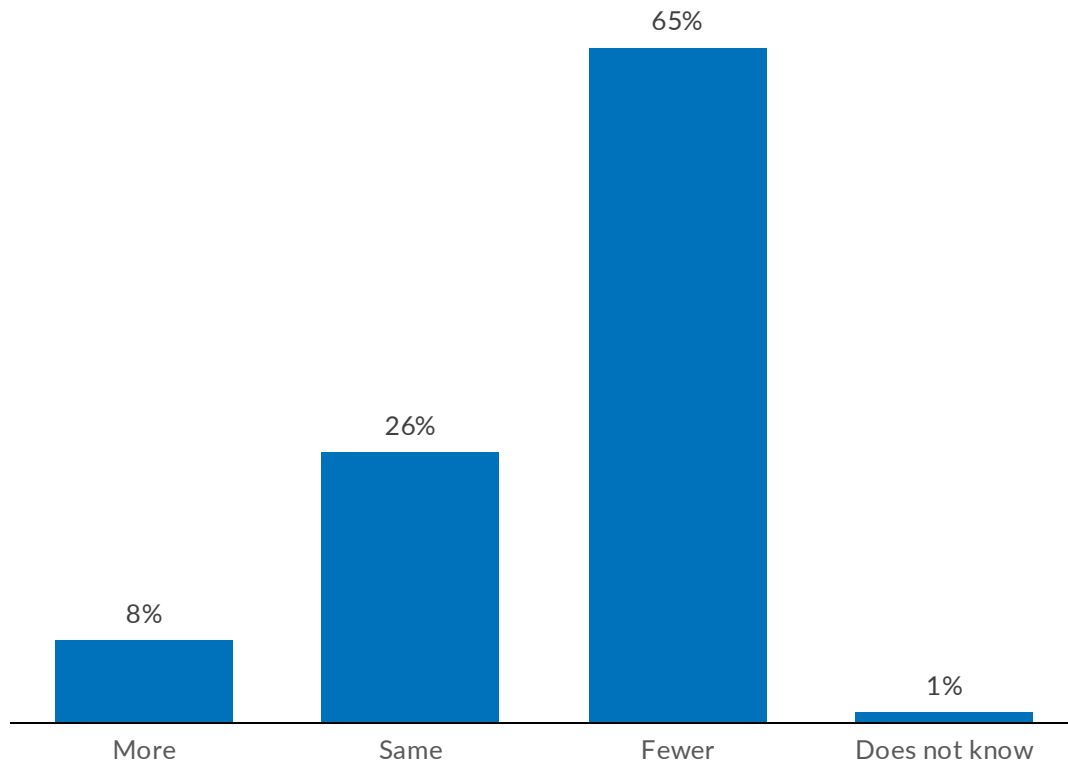
Most households (32%) stated that they do not have any savings to rely on.

Most respondents do not have enough savings to rely on for at least a year (92%). Among the households that can rely on savings, 27 per cent that estimate having savings that can last for one month, followed by the households that rely on savings for one to two weeks. Only two per cent have savings that they can rely on for a year. And five per cent either did not know (3%) or refused to answer (2%).

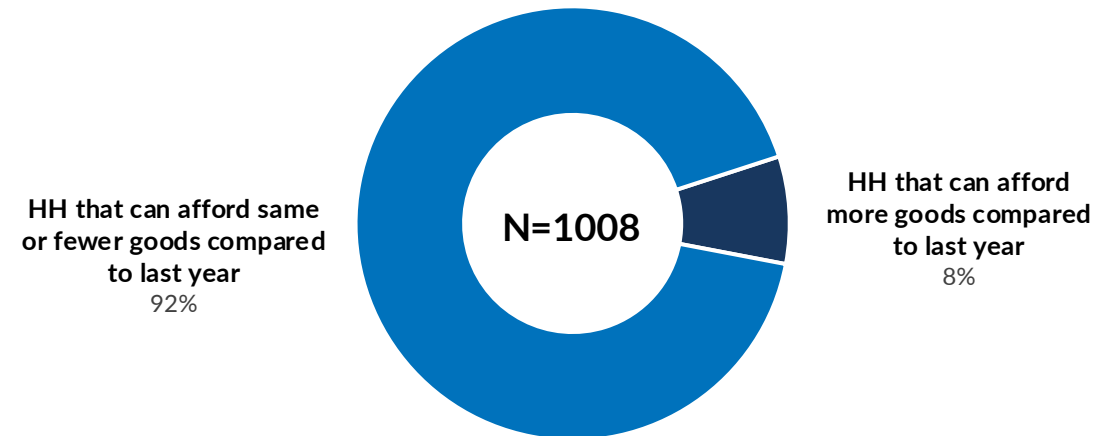
SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

Economic Capacity

% of HH by evolution of ability to afford same, fewer or more purchases, compared to last year | N=944



% HH that can afford more compared to last year



At the time of the survey, **most households could afford fewer goods compared to their first month in the country (64%)**, followed by 26 per cent that stated that they could afford the same amount of goods.

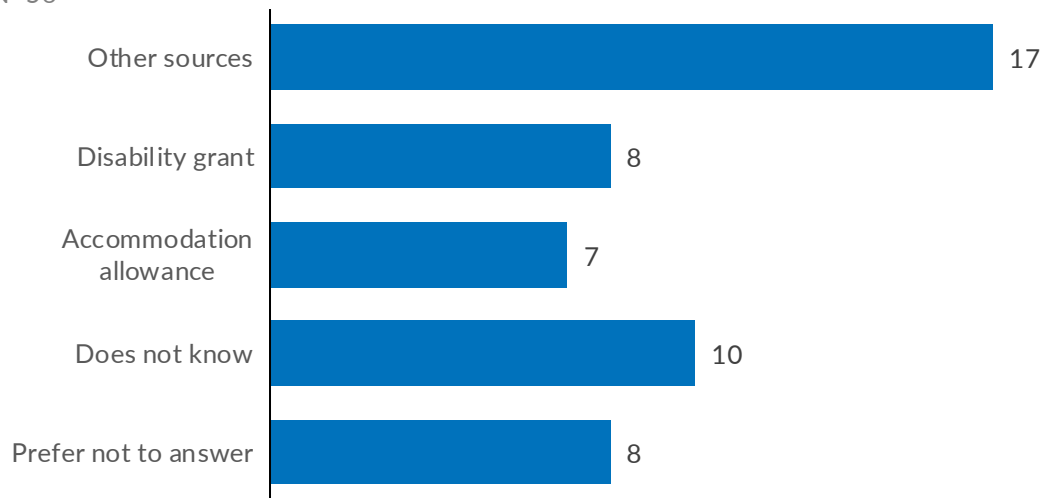
Only eight per cent can afford more goods compared to their first month in the country, while one per cent did not answer.

SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

Social Protection In Host Country

Type of social benefit received

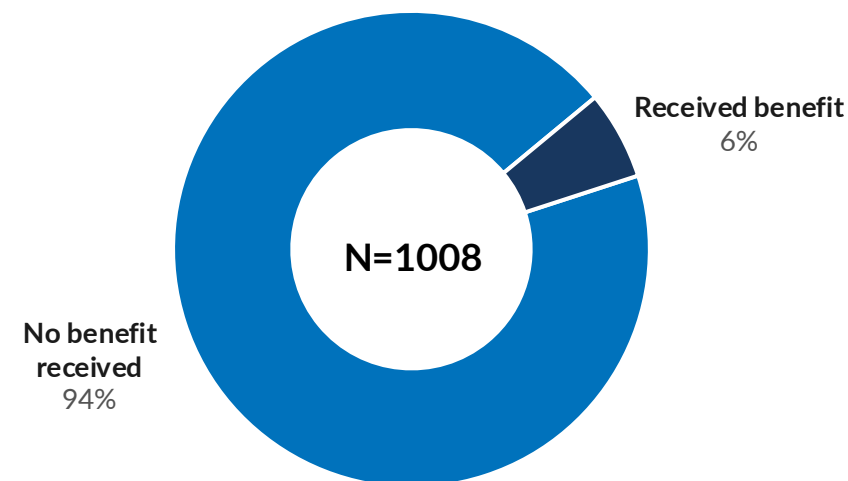
N=56



Out of the people receiving social benefits, **26 had expressed their level of satisfaction with it.**

Most respondents were either somewhat satisfied (7) or very satisfied (7) with the social benefits received. Four were either dissatisfied or very dissatisfied. The other 8 did not know how to answer (4) or had a neutral level of satisfaction (4).

% of HH's covered by social assistance plans in Romania

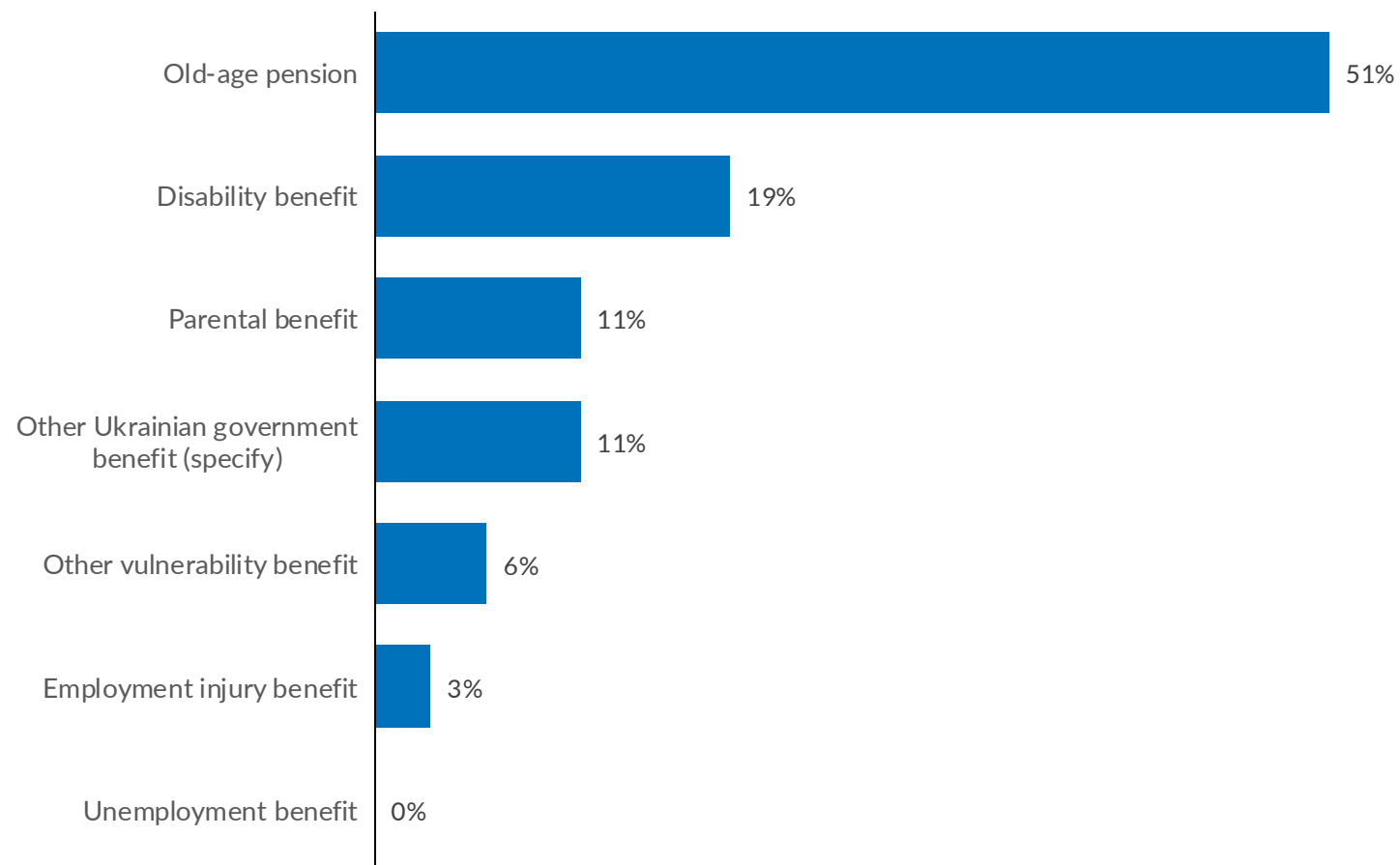


SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

Social Protection In Host Country

% HH receiving social protection cover from Ukraine

N=197



Food coping strategies are mechanisms used by households to cope in times of limited access to food.

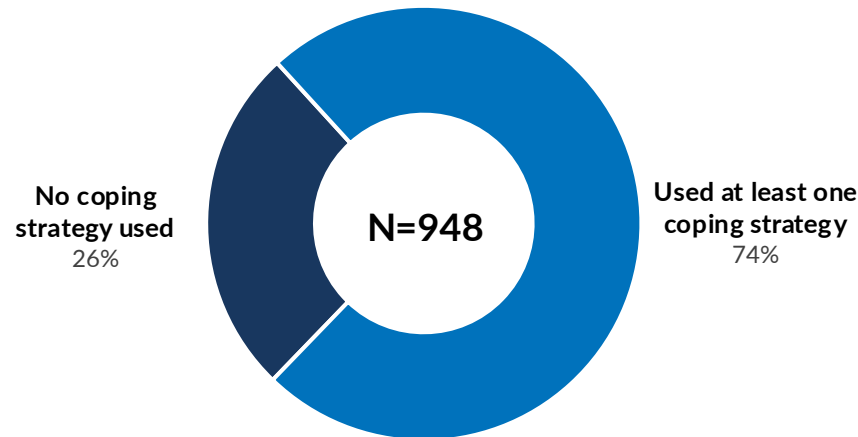
There is a set of **five food** coping strategies, used by respondents, ranging from safer coping strategies like eating less preferred foods, to more extreme ones, like reducing the number of meals eaten in a day.

Respondents were asked about food coping strategies used in the past seven days of the survey. **One household can use more than one food coping mechanism.**

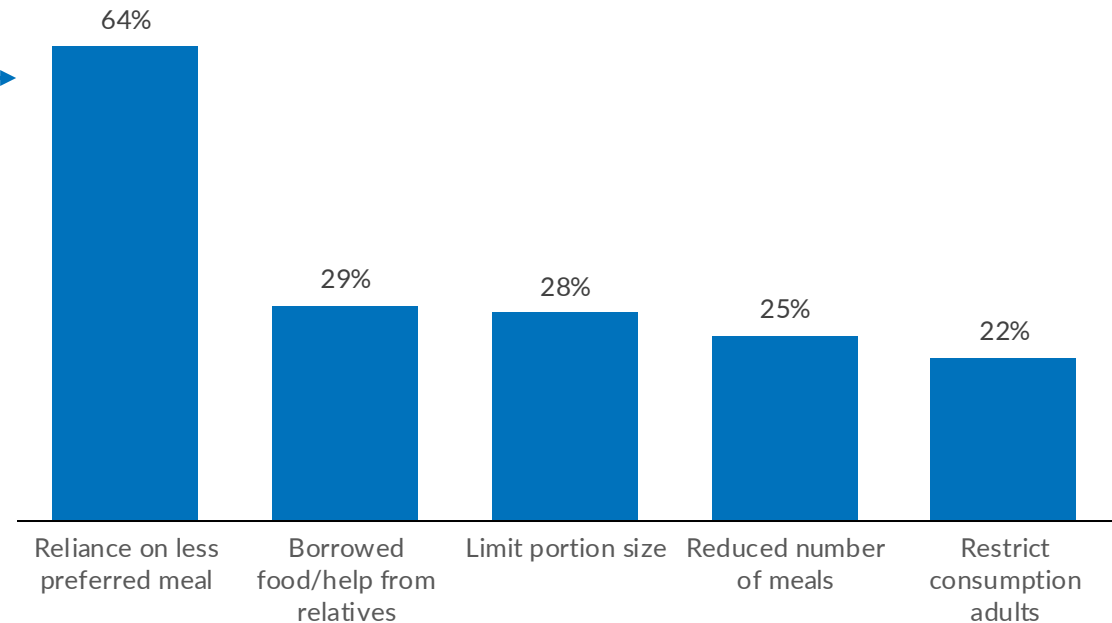
SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

Food Coping Strategy

Share of HHs that have resorted to at least one food coping strategy in the past seven days



Share of HHs that have used at least one coping mechanism
N=1008



In 2024, a total of 74 per cent of the surveyed families have relied on coping mechanisms related to food.

The coping mechanisms mainly used were reliance on less preferred, less expensive foods (64%), borrowing food or reliance on help from relatives (29%), reduced the portion size of the meals eaten in a day (28%), reduced the number of meals eaten per day (25%), and restricted consumption by adults in order for children to eat (22%).

SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

Coping Mechanisms

Another form of coping strategies used are livelihood coping strategies, which are used to understand the medium and longer-term coping capacity of households and their ability to overcome challenges in meeting their essential needs in the future.

The indicator is derived from a series of questions regarding the households' experiences with livelihood stress and asset depletion to cope with food shortages. There are three types of coping mechanisms, ordered from the safest to the most extreme ones: Stress coping mechanisms, Crisis coping mechanisms and Emergency coping mechanisms.

STRESS COPING MECHANISMS

include spending savings, purchasing food on credit or borrowing it, selling household goods or assets or migrating to another region due to high costs of living.

CRISIS COPING MECHANISMS

include reducing essential health expenditure, reducing essential education expenditure, selling productive assets or means of transport or withdrawing school aged children or youth from school/ university.

EMERGENCY COPING MECHANISMS

include engaging in high risk or dangerous jobs or sources of income, involving school aged children in income generating activities, and lastly selling house or land, even in Ukraine.

84% OF HHs
ARE USING A
COPING
MECHANISM

16% ARE
NOT ADOPTING
STRATEGIES

SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

Coping Mechanisms

39% STRESS
COPING STRATEGIES

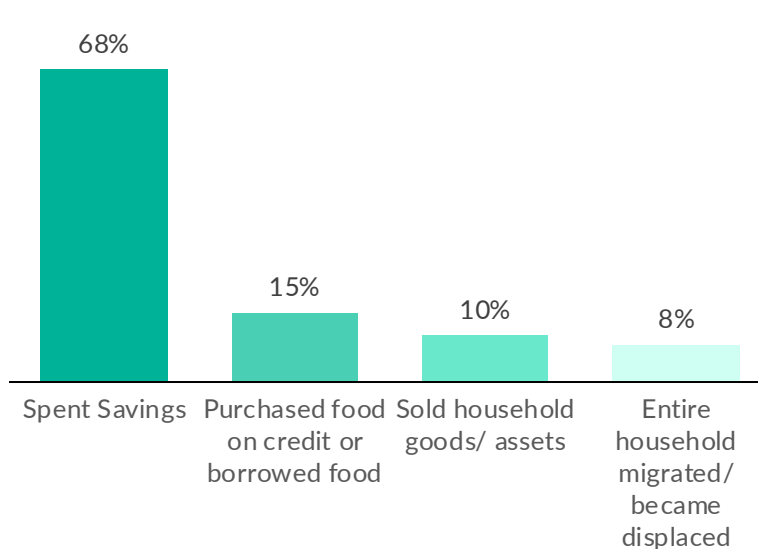
38% CRISIS
COPING STRATEGIES

7% EMERGENCY
COPING STRATEGIES

Stress Coping Mechanisms

Share of HH using stress coping mechanisms

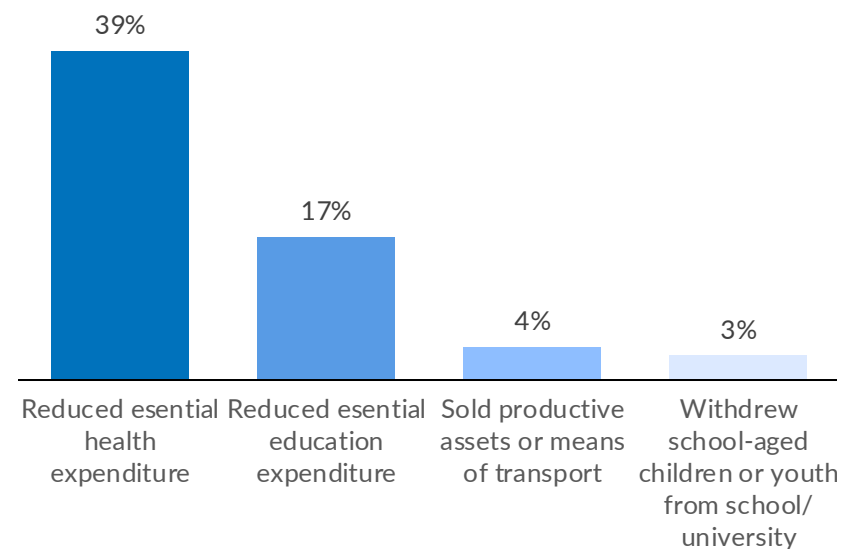
N=1008



Crisis Coping Mechanisms

Share of HH using crisis coping mechanisms

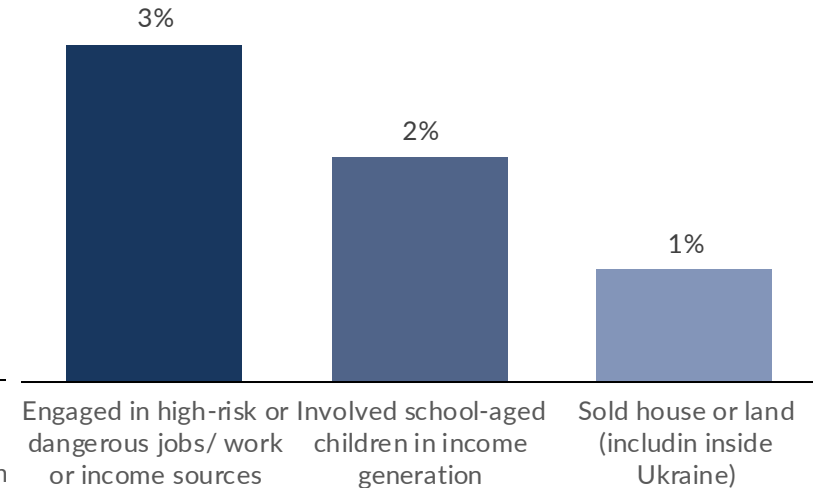
N=1008



Emergency Coping Mechanisms

Share of HH using stress coping mechanisms

N=1008

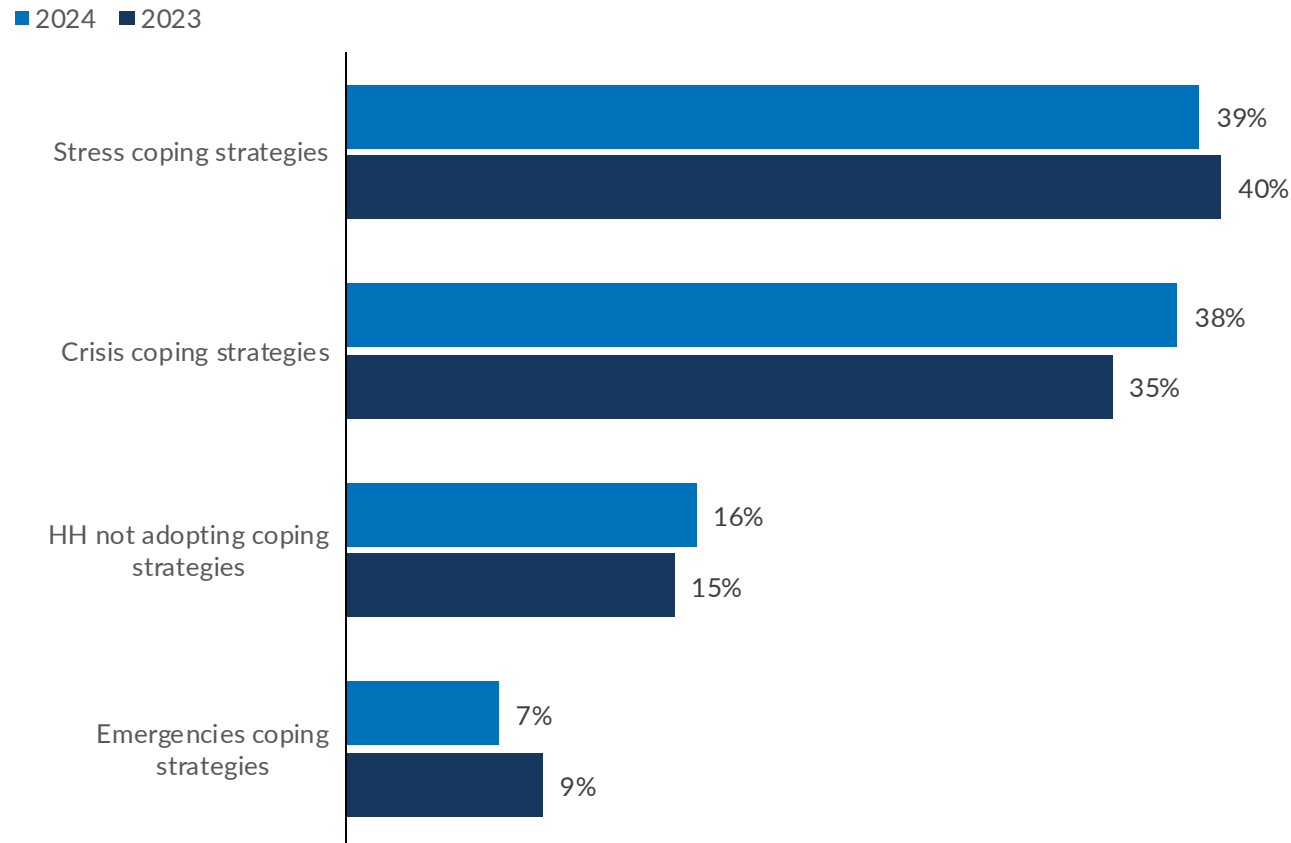


SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

Max Coping Strategy

Coping mechanisms usage 2023 and 2024 comparison

2024 | N=1008; 2023 | N= 1222



The share of respondents not using any form of coping strategy has remained similar in 2024 (16%) compared to 2023 (15%).

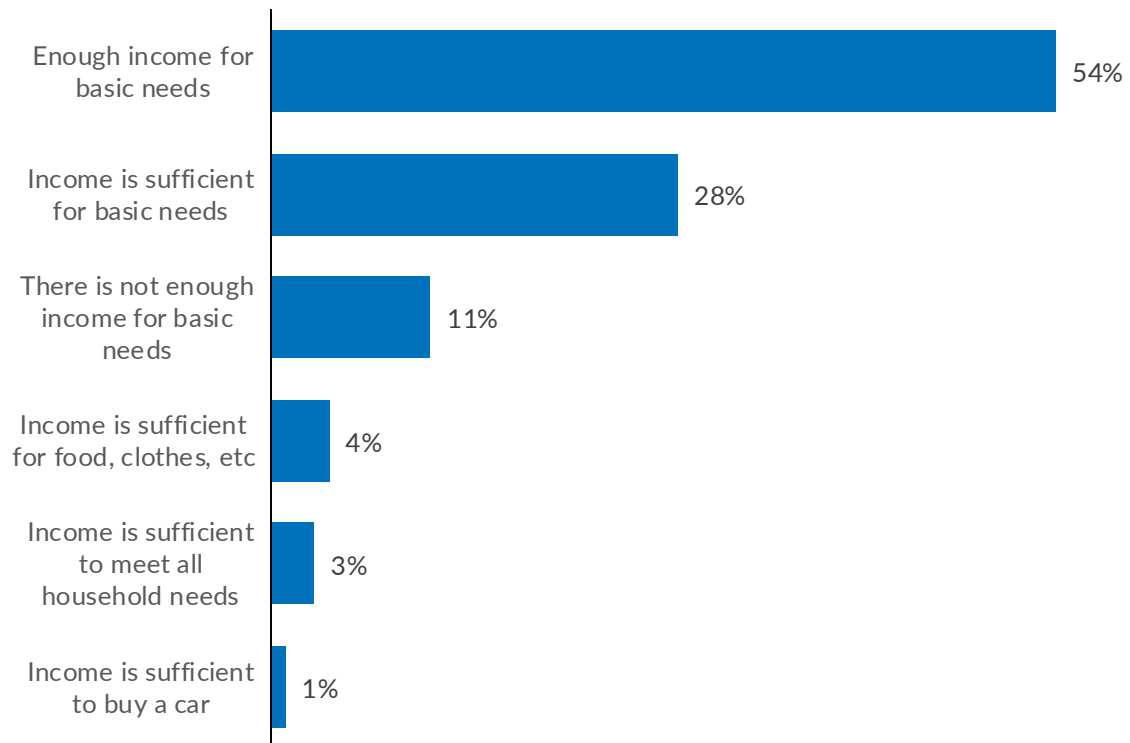
The most significant change in coping strategies used appears in the case of Crisis coping mechanisms, which sees an eight per cent increase from 35 per cent in 2023 to 43 per cent in 2024.

SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

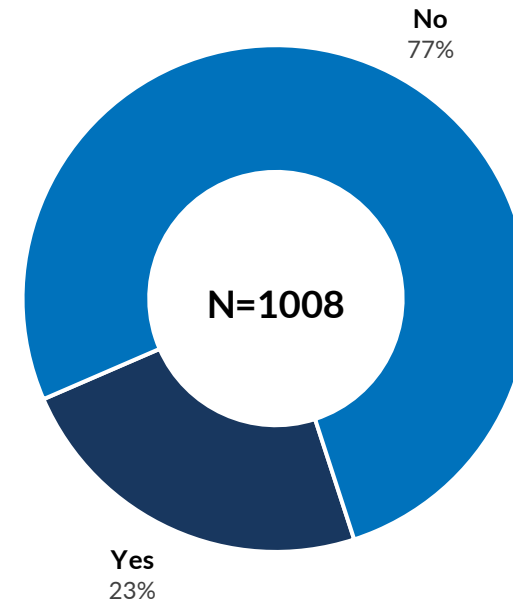
Income

HH income level

N=1008



Family member supporting HH financially from Ukraine

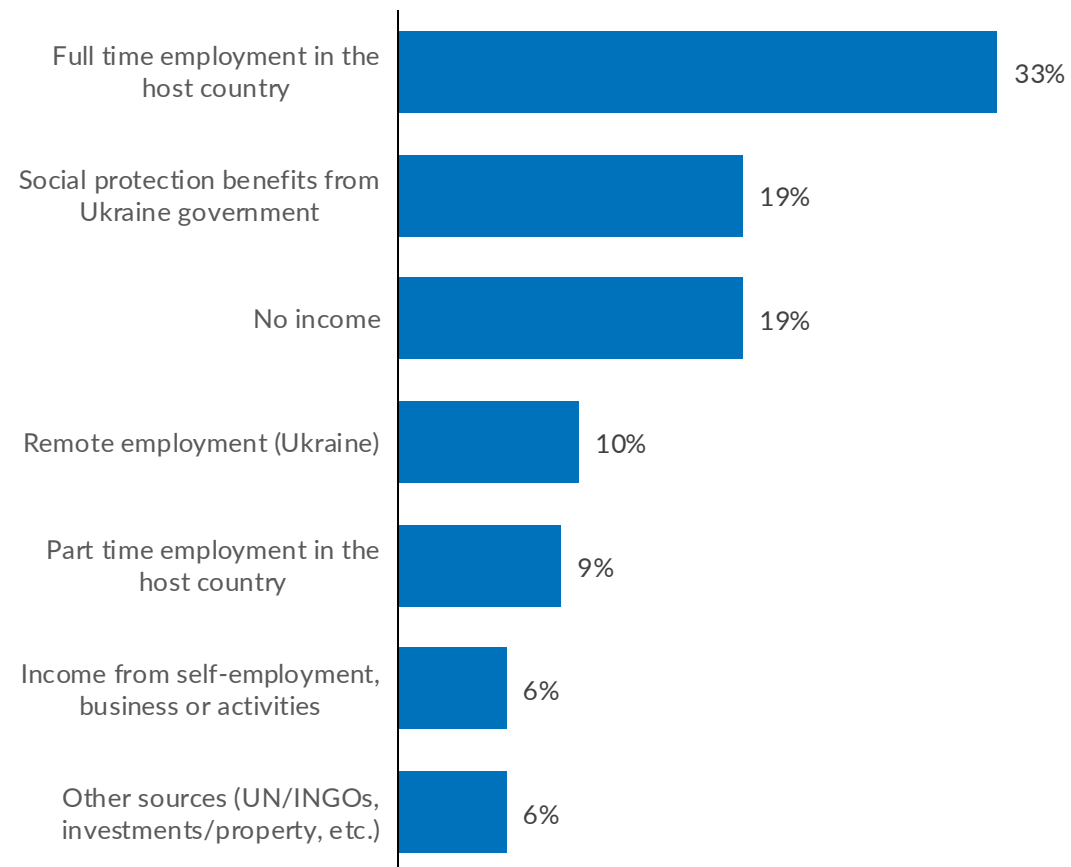


SOCIO-ECONOMIC INCLUSION & LIVELIHOOD

Income

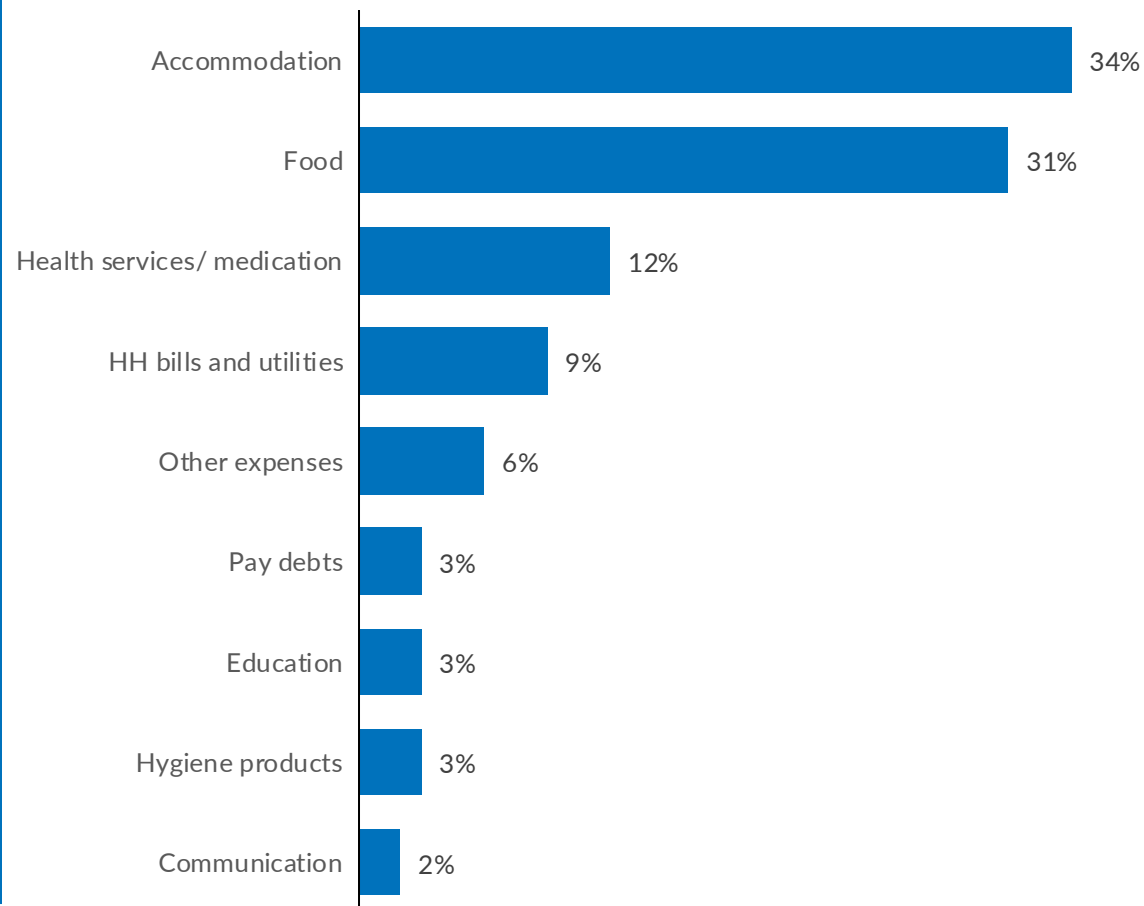
Types of income received

N=1008



% of expenses in HHs

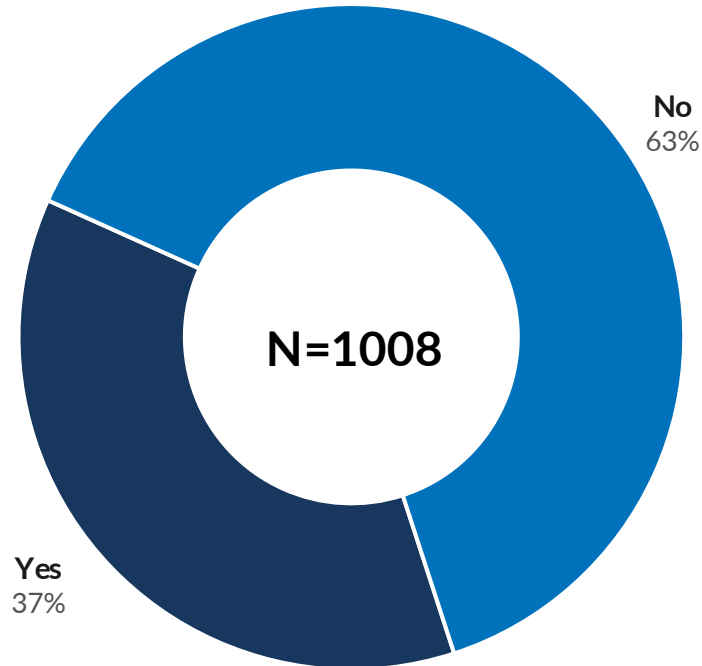
N=1008





HEALTH

% of individuals with a chronic illness



*Does the person have a chronic illness? (e.g., diabetes, hypertension, asthma)

60% % OF HHS WITH A
CHRONICALLY ILL MEMBER

In 2023, there were 50% of HH with at least one chronically ill member.

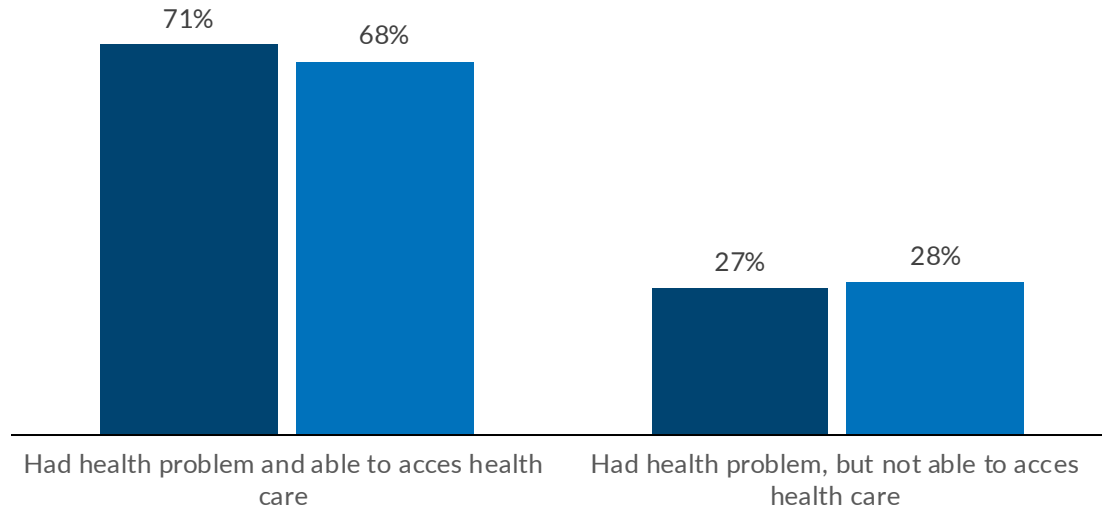
In 2023, 33% of the refugees were living with a chronic illness. This percentage at the individual level is similar in 2024 to the one recorded in 2023.

36% of individuals reported having a health problem and in need to access health care services.

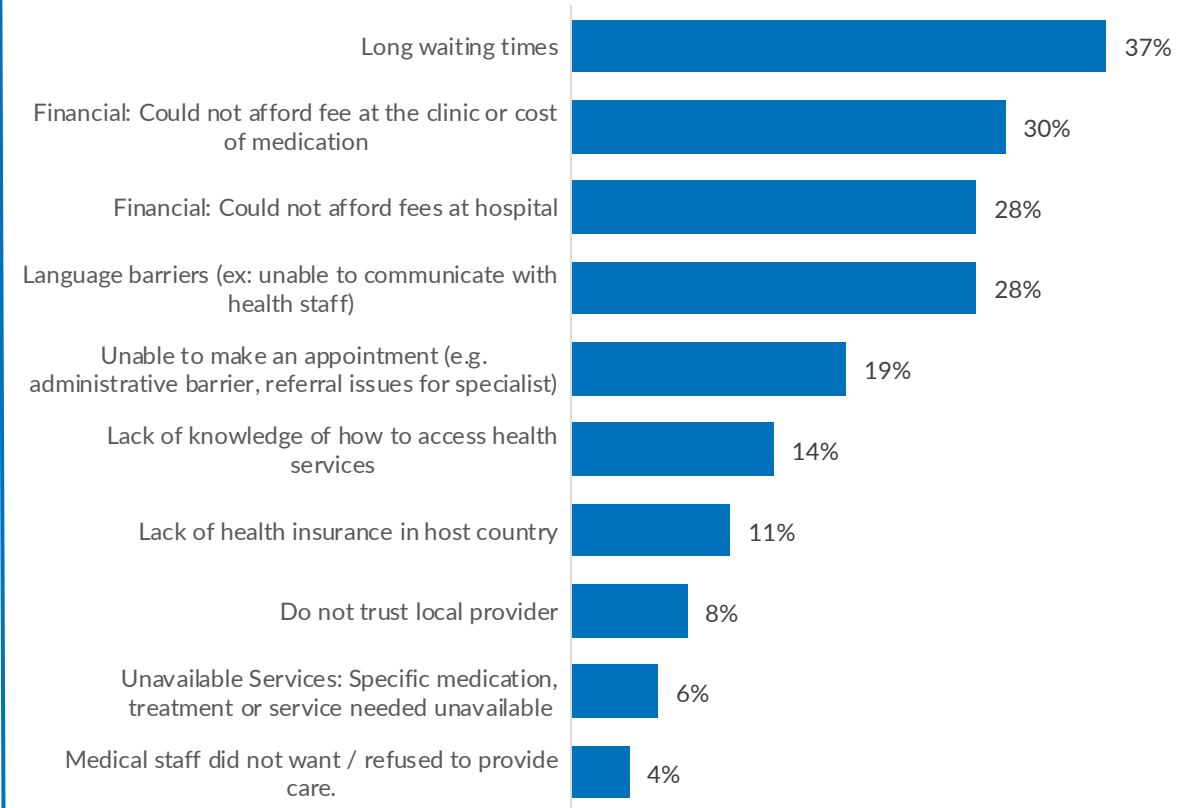
% of refugees with access to health services

N=1089

■ 2024 ■ 2023

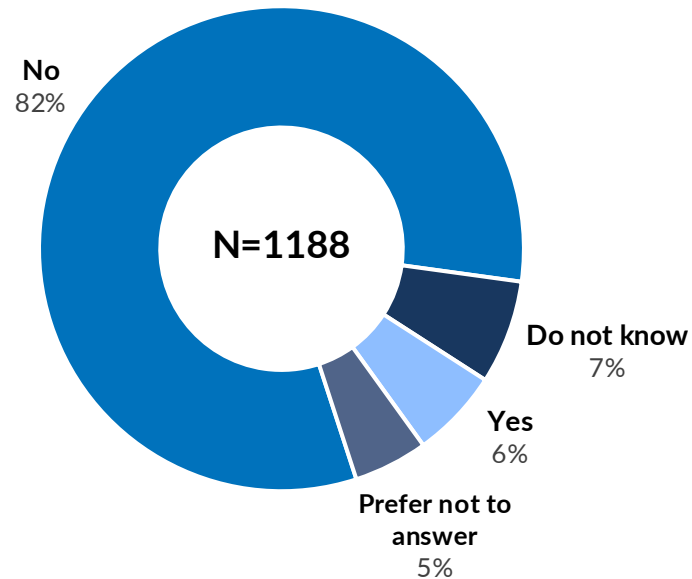


% of individuals by self-reporting barriers to accessing health care in the last 30 days (MCQ) | N=308



Both high costs of the medical services (58% in total) and the long waiting times (37%) seem to be the most important barriers in 2024, followed by language barriers (28%).

Women facing barriers in accessing SRH services

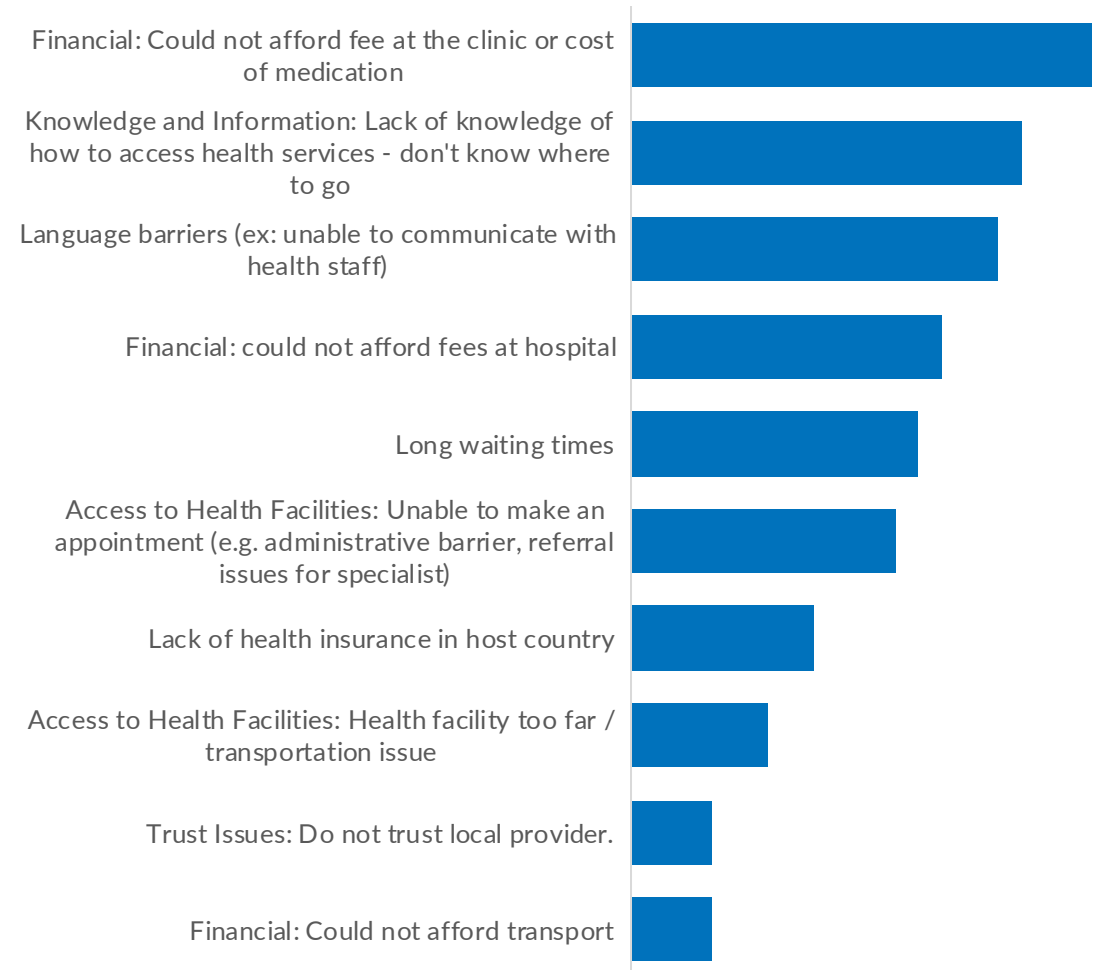


Most of the women (83%) did not face any barriers in accessing sexual and reproductive health services.

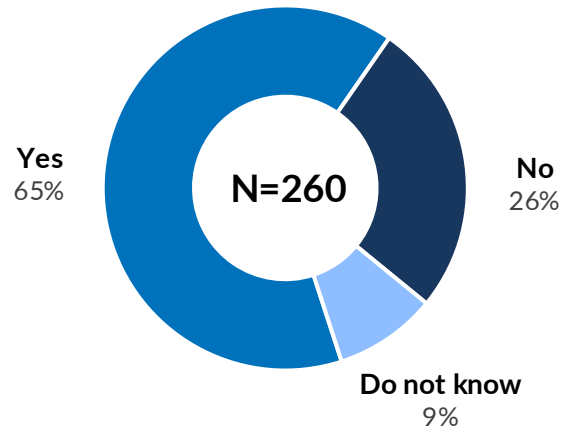
From the ones (6%) that faced barriers in accessing SRH services, the financial aspects, grouped in high fees at the clinic (40%) together with high fees at the hospital (27%) and transportation (7%), are among the top barriers. Aspects related to lack of knowledge on how to access health services (34%) and language barriers (32%) are perceived as important barriers.

Barriers to access SRH services (MCQ)

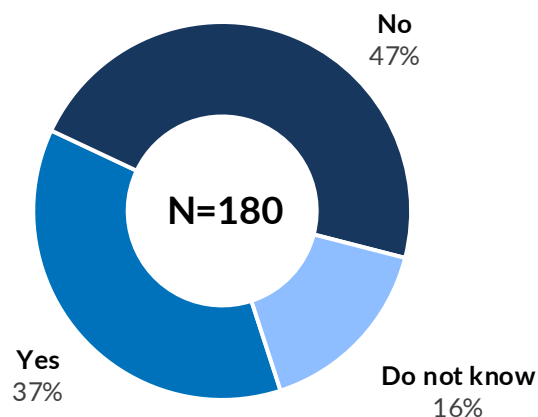
N=81



Children aged 9 months-5 years who received 1st dose of measles vaccination



Children aged 9 months-5 years who received 2nd dose of measles vaccination



As per the sample, only 64% of children received the 1st dose of the measles vaccine and 37% the second dose.

The percentages are low if it is to consider the public health challenges posed by the infection with measles. Moreover, most of the infants have been breastfed in less than 24 hours after birth. However, due to the low sample size, the data are not statistically significant.

When assessing if and when the child was breastfed after giving birth, data indicates that for 33 children the breastfeeding was initiated at less than one hour after giving birth, and for 19 between one and 23 hours. However, the sample size was very small and included data only about 59 babies. Therefore, the findings are not statistically robust.

% of individuals who experienced mental health or psychosocial problems:

31%

% of individuals who tried to access MHPSS support

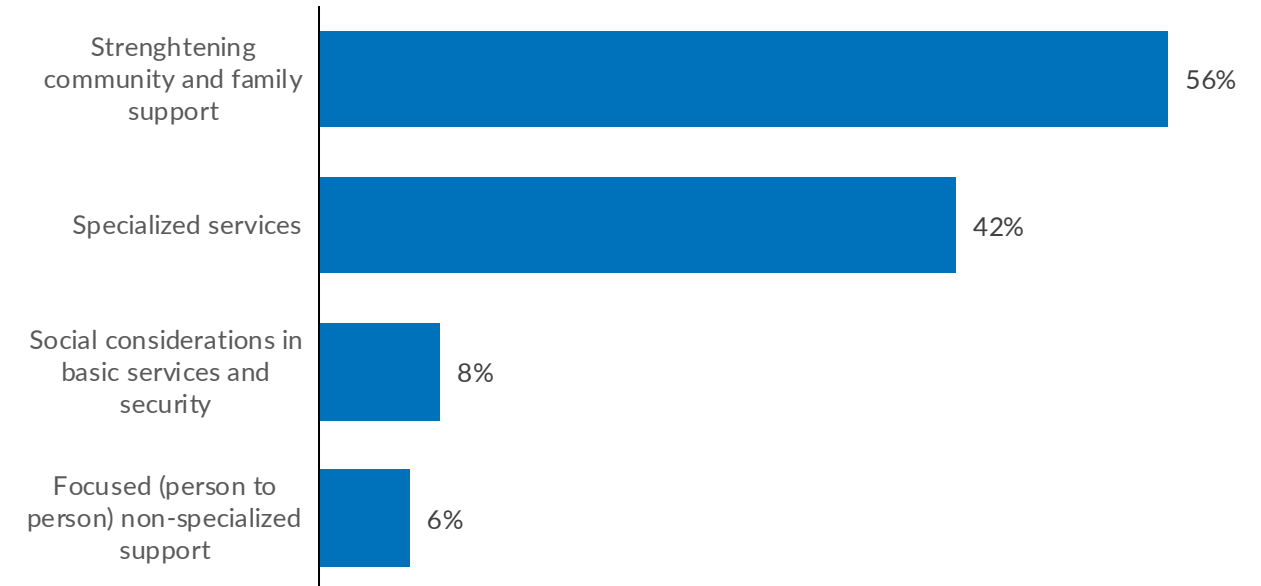
33%

% of individuals who received MHPSS support

93%

Mental health and psychosocial services received by individuals (MCQ)

N=295



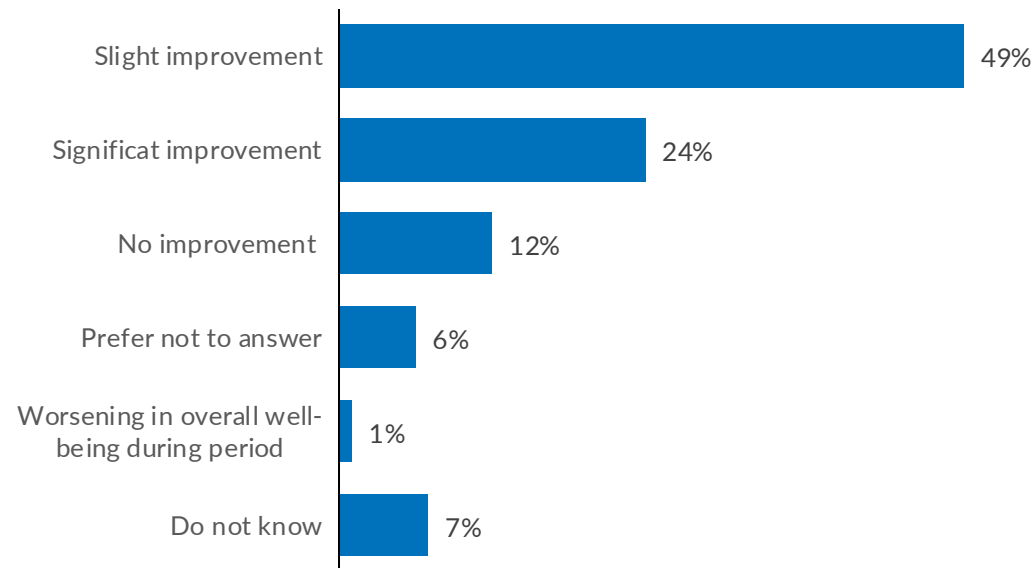
Out of the sample, 31% of HH members declared having psychosocial difficulties in the last 30 days.

When asked if they tried to access MHPSS support, 33% said yes and 63 said no (out of the 31%). The most frequent services received were support services from the family and community (including spiritual support and recreational activities), followed by specialized services (psychotherapy and medication management).

In 2024, 24% of respondents showed significant improvement and 49% showed slight improvement (73% in total). The 2023 data indicate that 85% of respondents reported both significant and slight improvement, a higher percentage than 2024.

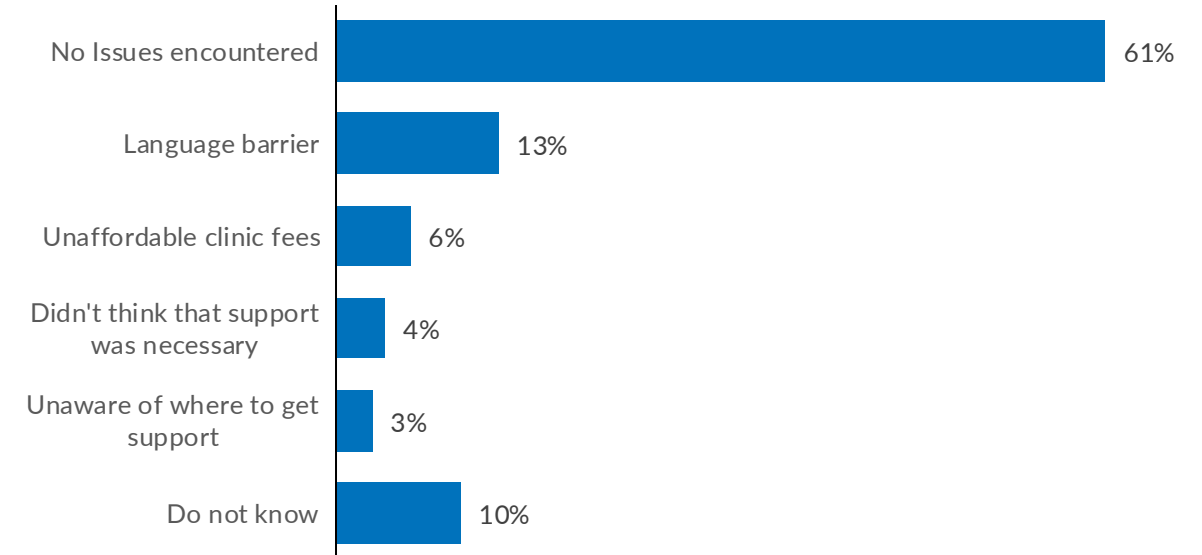
% of individuals reporting well-being improvement after receiving MHPSS services

N=290



Reported barriers to accessing mental health and psychosocial support services (MCQ)

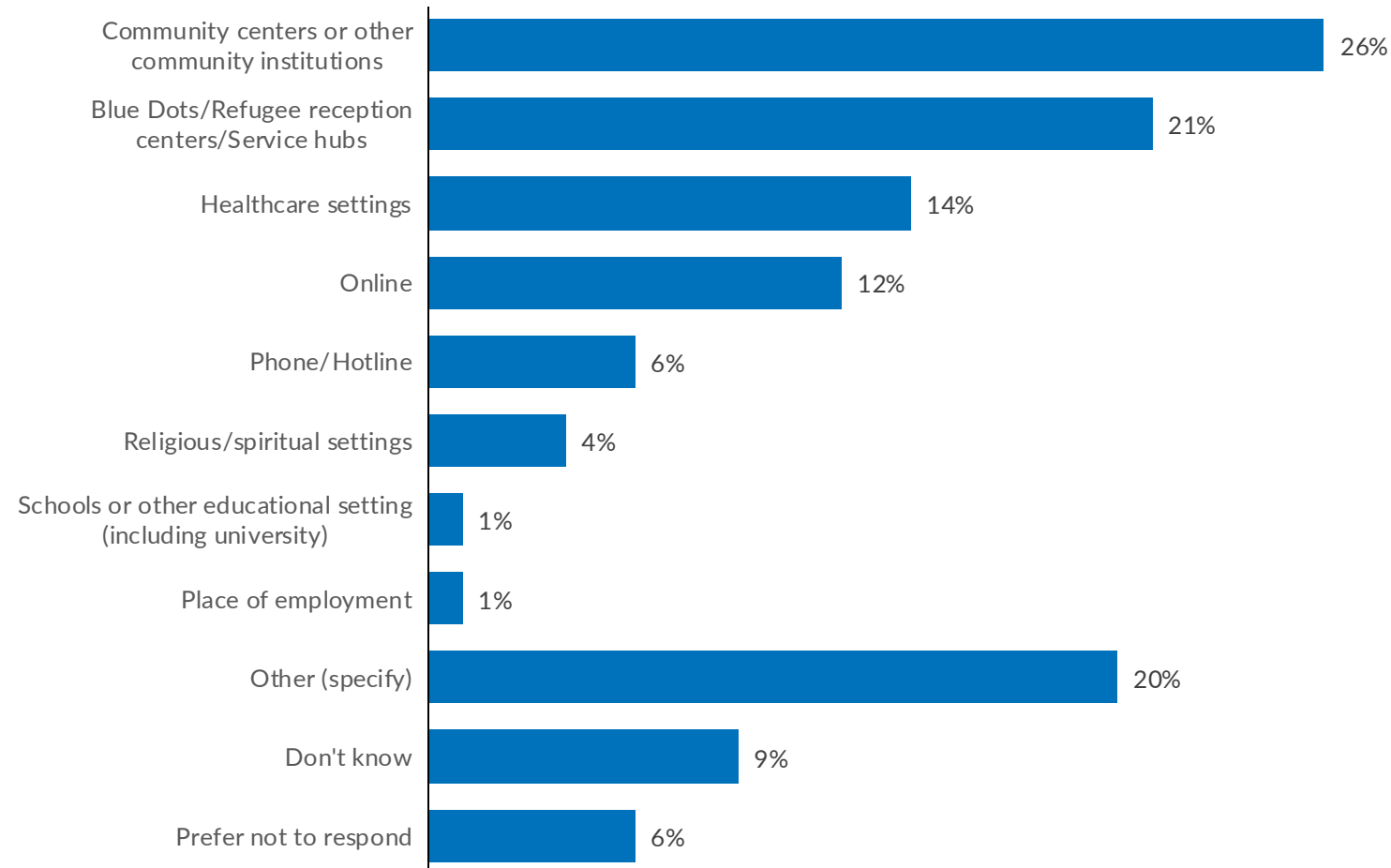
N=417



For 2024, 61% of the respondents indicate there are no barriers in accessing mental health and psychosocial support services. Language barriers and unaffordable clinic fees remain important barriers (13% and 6%), but the percentages are smaller than 2023 (32% - language barriers and 15% - high fees).

Location of the MHPSS services (MCQ)

N=278



As per the sample, 26% of the respondents received MHPSS services in community or other refugee centers, 21% in blue dots/refugee reception centers or service hubs, 14% in health care settings and 12% online, indicating that receiving points and community centers are very important species for delivering MHPSS services.

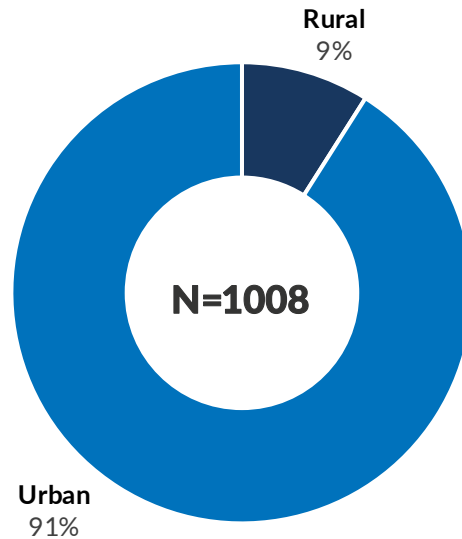


ACCOMMODATION

SHELTER/ACCOMMODATION

Security of Tenure, Living Conditions

Distribution of HHs by area of living

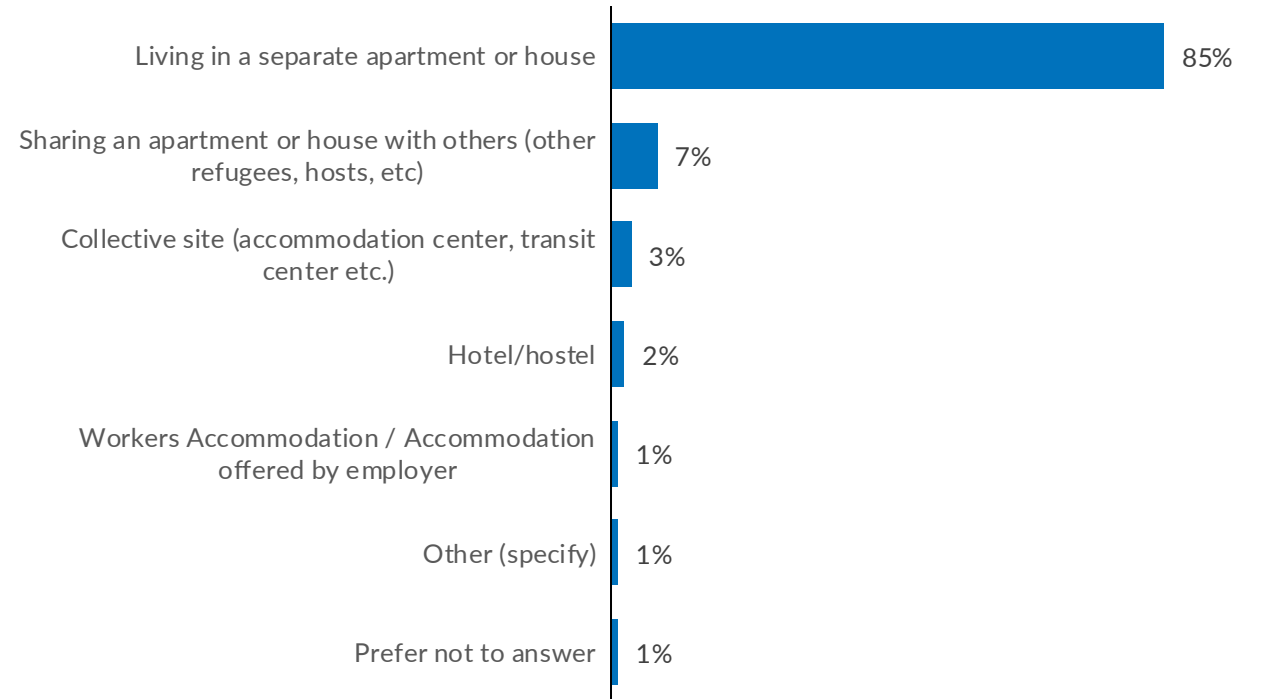


The majority of households continue to prefer urban areas as their primary choice of residence, maintaining a trend similar to the distribution observed in 2023.

This preference reflects factors like access to amenities, employment opportunities, and infrastructure, which cities and urban environments provide in greater abundance than rural areas.

Distribution of households by the type of accommodations

N=1008



The data indicates that a significant majority (85%) of households opt for independent living in separate apartments or houses, highlighting a strong preference for privacy and autonomy. Only a small fraction shares accommodations or stays in collective sites or temporary lodging.

SHELTER/ACCOMMODATION

Security of Tenure, Living Conditions



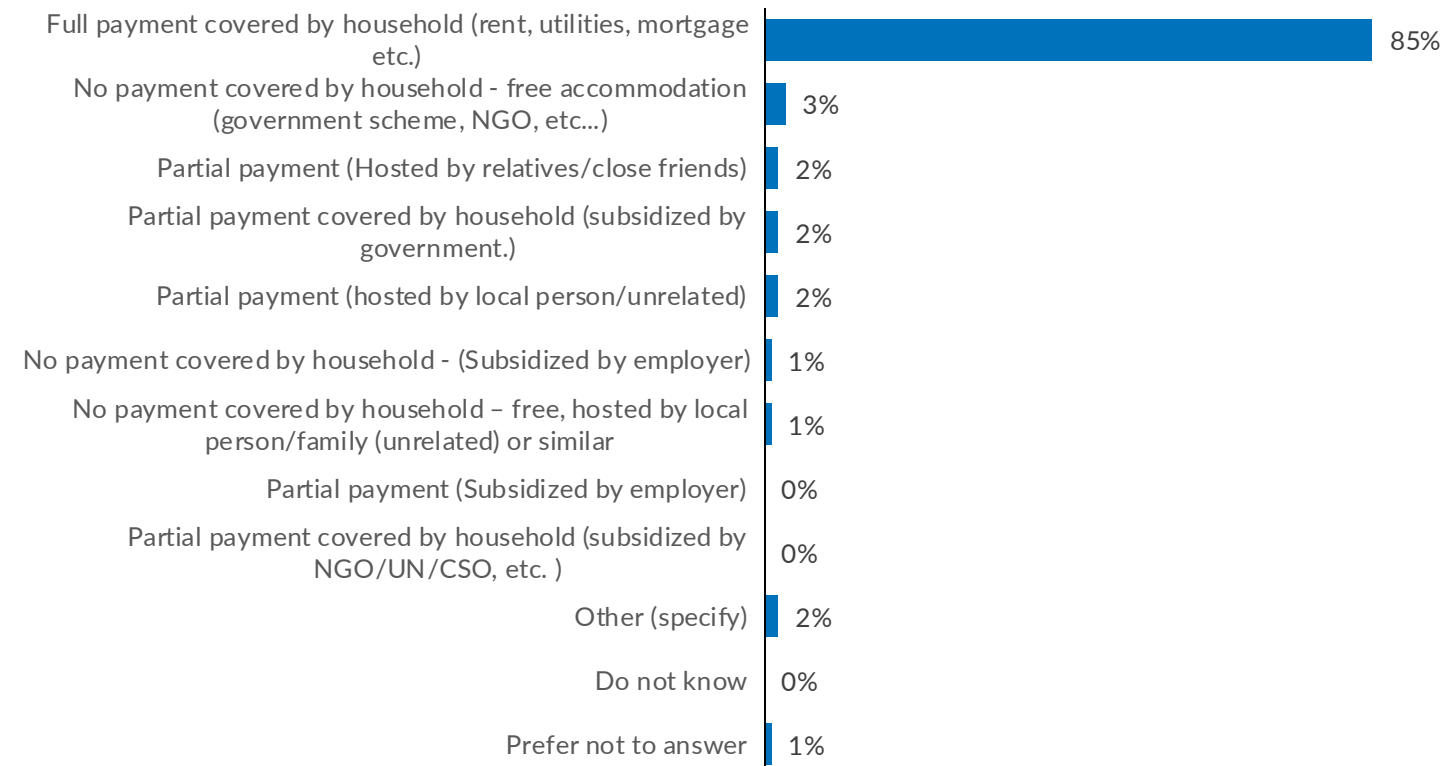
**AVERAGE MONTHLY EXPENDITURE
ON RENT AND HOUSEHOLD BILLS**

1,974
RON on Rent

536
RON for Household Bills

% of HH by accommodation payment arrangement

N=1008



Despite the relatively low employment rate and the fact that the vast majority of respondents reported being able to afford significantly fewer goods compared to the initial months of their stay in Romania, similar to 2023, **the largest proportion of respondents stated that they independently covered all housing-related expenses.**

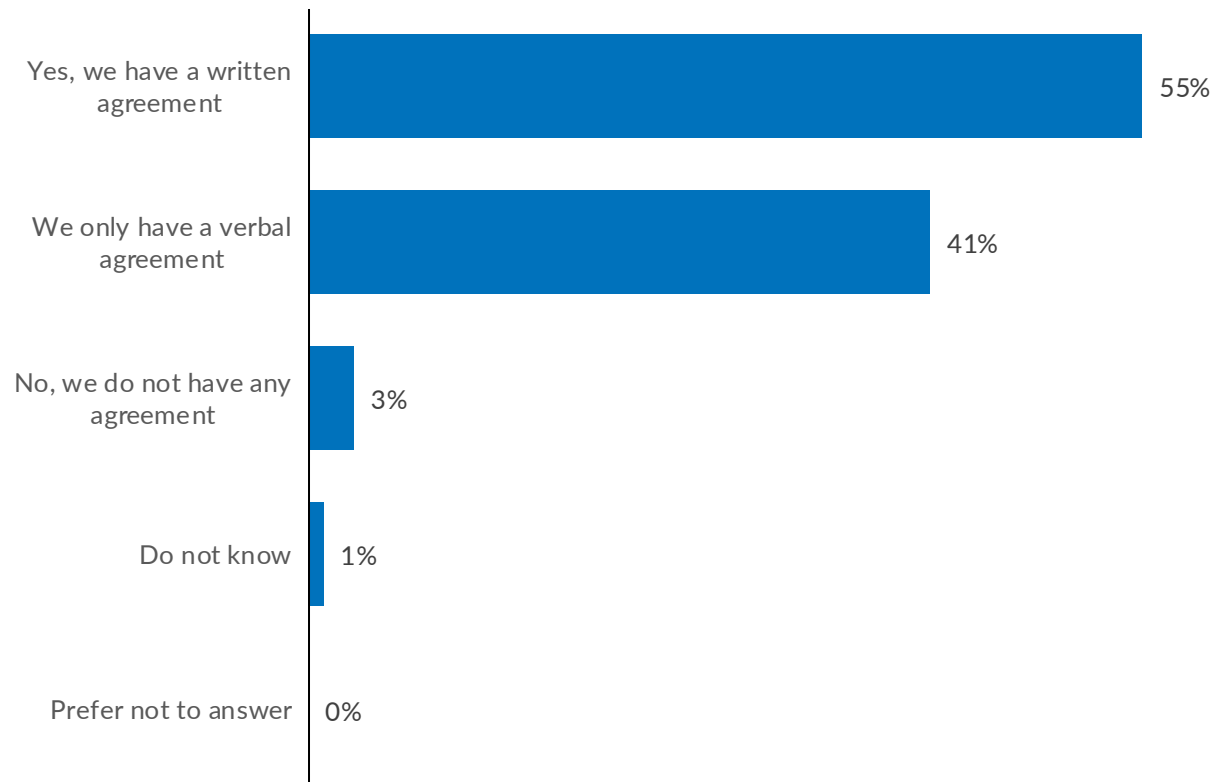
At the same time, the number of respondents fully subsidized by NGOs, the government, or living rent-free has declined. This trend aligns with the conclusion or significant reduction of most housing sponsorship programs, which has placed additional financial pressure on many individuals and families.

SHELTER/ACCOMMODATION

Security of Tenure, Living Conditions

% of type of agreement for accommodation

N=1008



The data reveals that 55% of households have established a written agreement regarding their living arrangements, indicating a relatively formal and secure approach to housing.

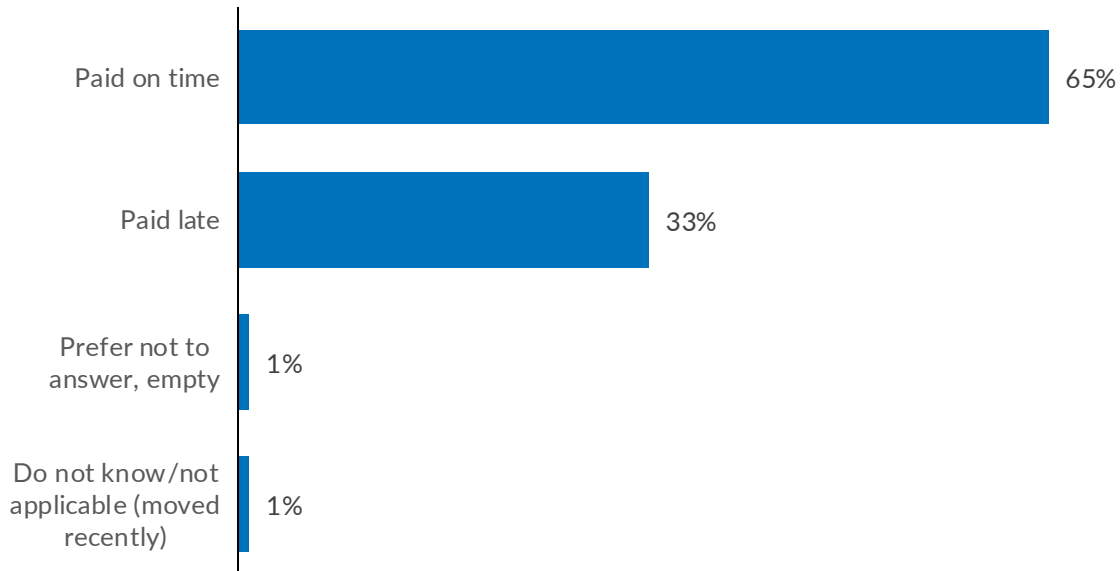
In contrast, a significant proportion (41%) rely on verbal agreements, reflecting a more informal understanding of their housing situation. A small percentage (3%) report having no agreement at all, while a minimal number (1%) are uncertain about the status of their agreement.

SHELTER/ACCOMMODATION

Security of Tenure, Living Conditions

% of HHs in relation to payment timelines and difficulties experienced

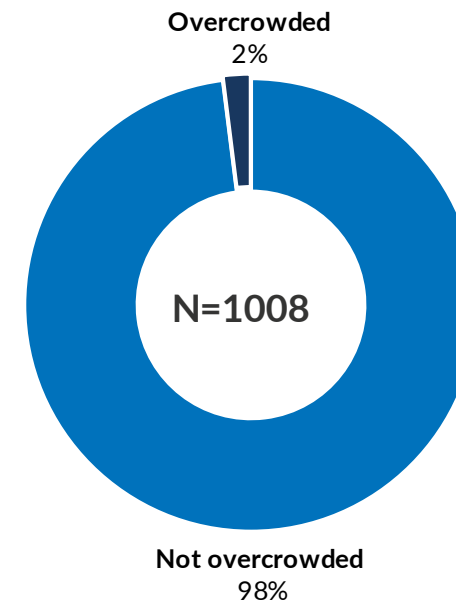
N=900



While 65% of households can pay housing-related expenses on time without delays, 18% reported that making these payments is quite challenging and 33% have experienced significant difficulties, having delayed housing and utility bill payments at least once.

The vast majority of households (98%) report that their living conditions are not overcrowded, indicating a relatively comfortable living situation. In contrast, only a small fraction (2%) of households experience overcrowding.

% of HHs living in overcrowded conditions



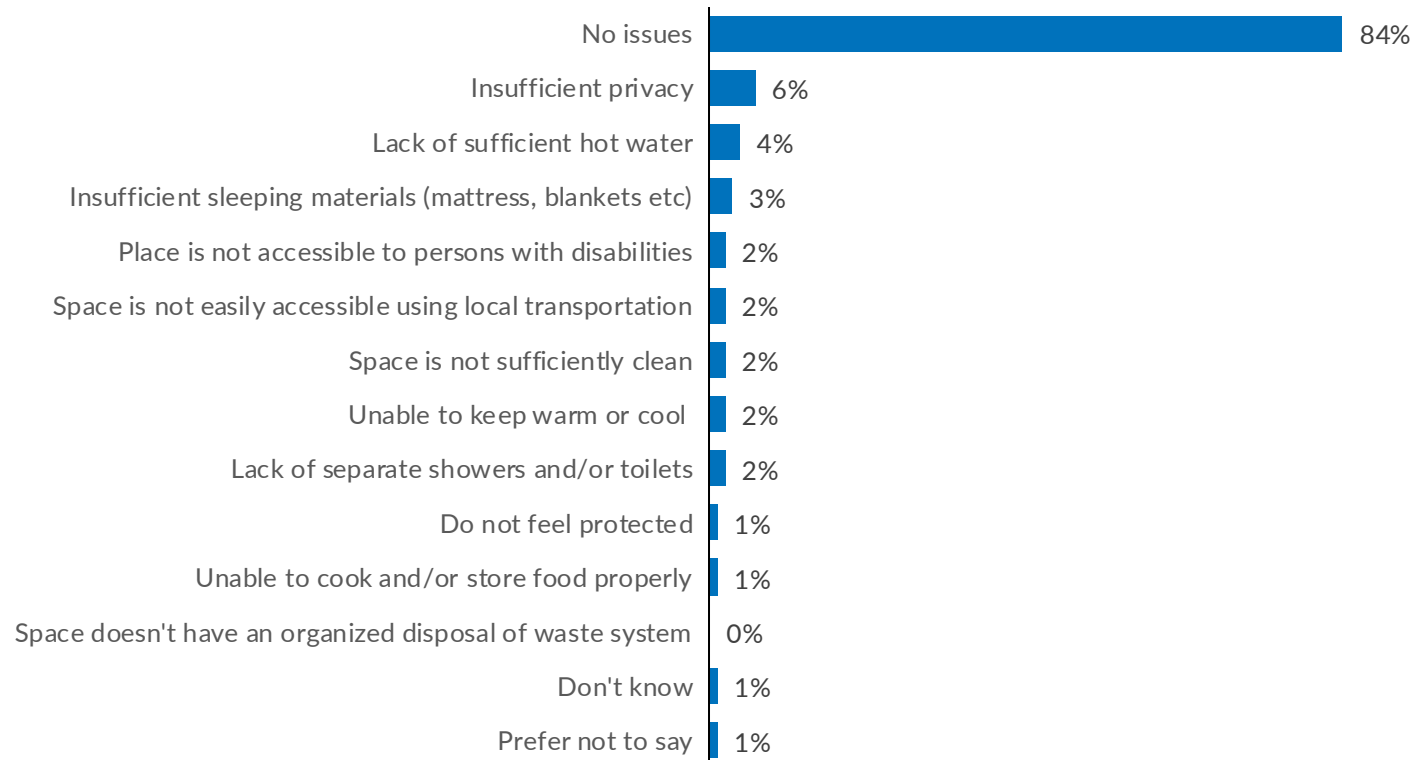
SHELTER/ACCOMMODATION

Security of Tenure, Living Conditions

The majority of the respondents stated that they don't have issues with their current accommodation.

Distribution of reported issues with current accommodation (MCQ)

N=1008



ISSUES RELATED TO THE UPCOMING WINTER MONTHS

2% OF HHs HAVE INSUFFICIENT HEATING

4,7% OF HHs HAVE INSUFFICIENT INSULATION

2,1% OF HHs HAVE NO HOT WATER

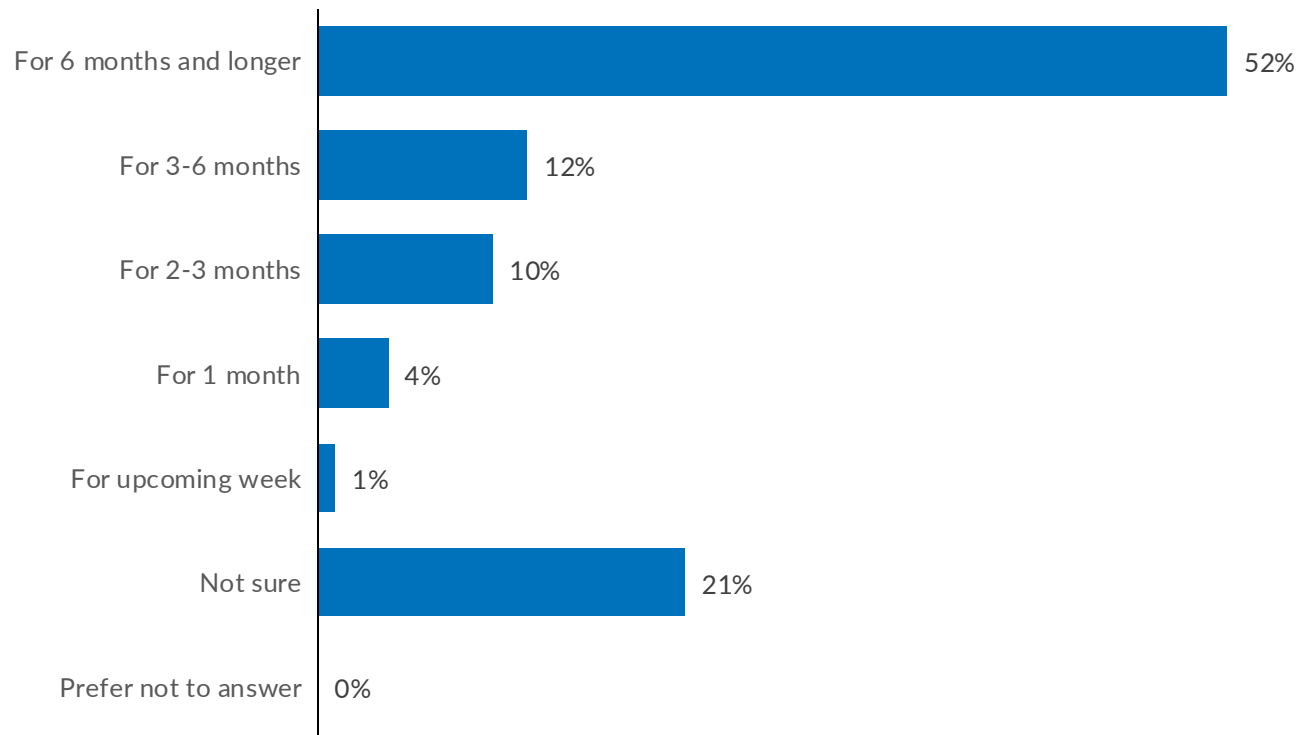
SHELTER/ACCOMMODATION

Security of Tenure, Living Conditions

Many households feel secure in their living arrangements, there is still a notable portion expressing uncertainty about their housing stability.

Distribution of HHs by perceived period to stay in a current accommodation

N=1008



52% of households expect to stay for 6 months or longer, indicating a sense of stability in their living situation.

21% are unsure about how long they can stay, reflecting uncertainty that may be due to various factors, such as lease agreements or personal circumstances.

12% anticipate staying for 3-6 months, while 10% expect to remain for 2-3 months. A smaller percentage (4%) can stay for 1 month, and only 1% expect to stay for the upcoming week.

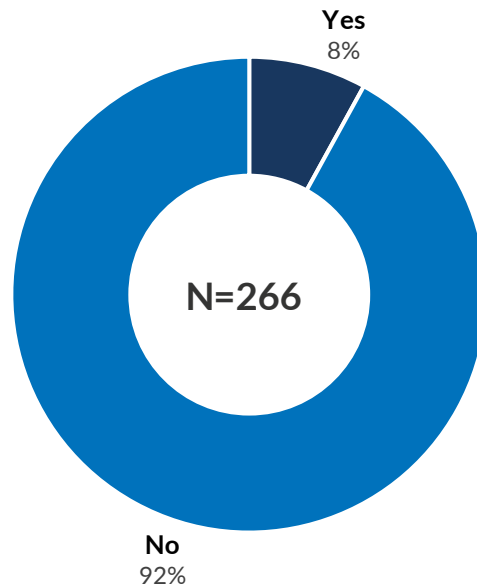
SHELTER/ACCOMMODATION

Security of Tenure, Living Conditions

Only 8% of respondents reported feeling pressured to relocate.

The primary reasons cited were increasing living costs, no availability of private accommodation, the end of a free or subsidized accommodation programmes, and the landlord's decision to no longer rent the home.

% of HHs under the pressure to leave current accommodation



As for the main reasons to leave the current accommodation, there were only 22 respondents answering to this question.

The most significant challenge reported is the rising cost of living and utilities (7 responses), making housing increasingly unaffordable. Additionally, factors such as landlords withdrawing housing availability (4 responses) and the end of free or subsidized housing programs (5 responses) have left many families without viable accommodation options.

Other contributing factors include social tensions, such as disputes with landlords or neighbors (3 responses), and inadequate living conditions, such as housing unsuitable for winter or lack of child support services (1 response each). Furthermore, employment opportunities, personal circumstances, and other individual needs (7 responses) have also influenced relocation decisions.

However, it is important to note that these findings may not be statistically robust, as they are based on a small sample size.

SOCIO-ECONOMIC INSIGHTS SURVEY ROMANIA

Final Analysis

December
2024

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