

Refugee Intentions Assessment

Key Findings Presentation

May 2025

REACH Informing
more effective
humanitarian action



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A light gray world map is centered in the background. Overlaid on the map is a complex, light gray geometric pattern of interconnected lines forming various sized triangles and polygons. The number '01' is positioned in the upper center of the slide, over the European continent.

01

Objectives and Methodology

Specific Objectives

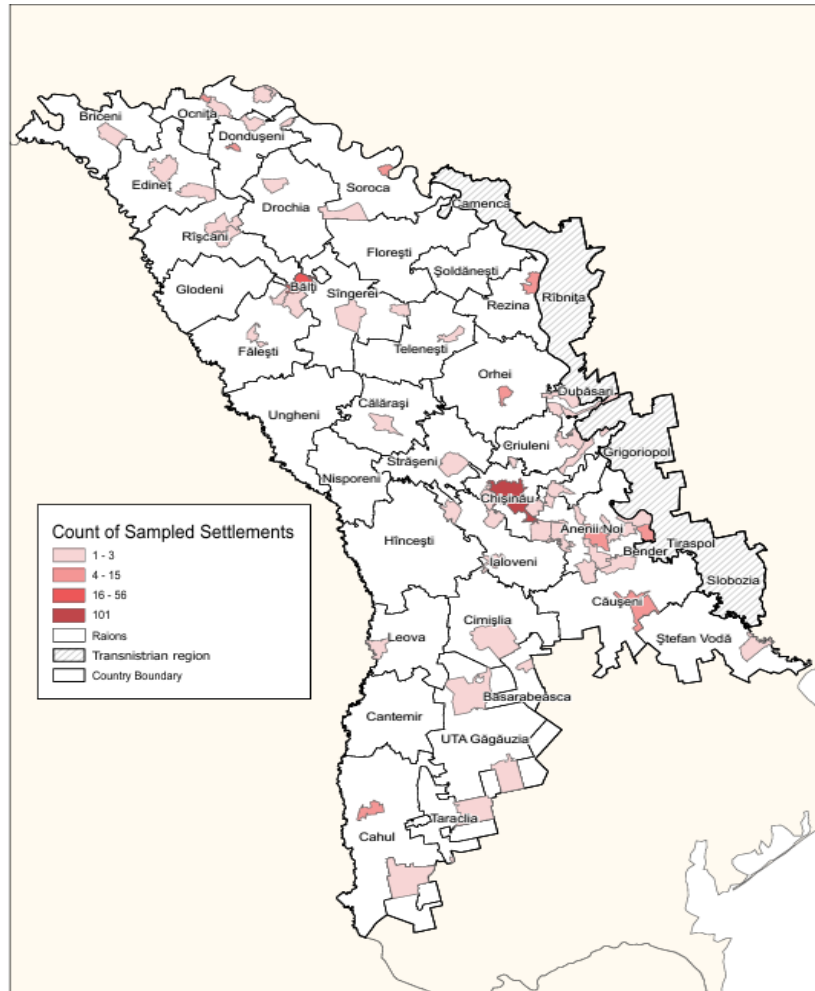
Quantitative

- Develop an understanding of the **demographic profiles** of refugee households from Ukraine, currently residing in Moldova, including possible vulnerabilities.
- Identify the **facilitators and barriers to remaining in Moldova**, considering community integration, safety and security, and access to services.
- Explore **perceptions of Ukraine among refugees as a potential place of future return**, considering their perceptions of their prospects in Ukraine, including perceptions of safety and security, and access to information.
- Understand the **mid and long-term intentions of refugee** respondents in the next 12 months, and what factors could impact their decision to stay in Moldova, return to Ukraine, or relocate to a third country.

Qualitative

- Consider **existing policy frameworks**, their evolution during their implementation period, as well as their effectiveness to date.
- Examine **how refugee-response policies may evolve strategically** in the coming 12 months to respond to the changing circumstances and needs of the refugee crisis in Moldova.

Methodology and Sampling



This assessment employed a **mixed-methods approach**:

Quantitative HH Surveys with Refugees

Sampling Method: Non-probabilistic stratified purposive sampling

- Regional stratification: Chisinau and North, South, and Centre

Qualitative Key Informant Interviews

Sampling Method: Purposive, with scoping conducted by the research unit, liaison officer, and the country coordinator

Population Coverage and Data Collection



POPULATION OF INTEREST

- **Quantitative Portion:** Refugees, who have been displaced from Ukraine to Moldova after 24 February 2022, currently residing in Moldova.
- **Qualitative Portion:** High-level representatives of the humanitarian response in Moldova, with a primary focus on working group leads to target the relevant sectors
- Does not include the Transnistrian region.



DATA COLLECTION

HH Surveys: From 1 November to 12 November 2024

KIIs: From 1 November to 13 December 2024



COMPLETED SURVEYS

290

HH quantitative surveys with refugees, conducted via phone call.

Average Age
of Respondents

45

Gender of
Respondents



93%



7%

of Household
Members

811

A total of 5 KIIs were conducted with Key Informants with representatives from the Basic Needs, Information Management, Education, Protection, and Livelihoods Working Groups

Key Limitations

Findings are indicative

- As the sampling approach is not representative, findings from this assessment should be considered **indicative and not representative** of the population of refugees from Ukraine in the Republic of Moldova.

Data Collection Timing

- Data collection was conducted prior to the reduction in global humanitarian funding in January 2025. Recent developments may have influenced the intentions of refugee HHs, but these changes are not reflected in the data due to the timing of data collection.

Sampling Challenges for Key Informant Interviews

- While there was a target of 8-10 key informant interviews, only 5 interviews were completed due to data collection time constraints and the limited availability of respondents. As a result, some sectors may not be represented or comprehensively covered in the qualitative portion.

Data Redundancy

- Although KIs were selected from a variety of sectors, much of the information provided overlapped and more broadly addressed the questions. As a result, despite the original intention to conduct the qualitative analysis by sector, this could not be done. The analysis is instead presented as overarching conclusions drawn from the KIs.

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02

Demographics

Demographics



Average HH size
2.8

% of surveyed HHs by settlement type
(n=290)



Rural areas
12%



Urban areas
88%

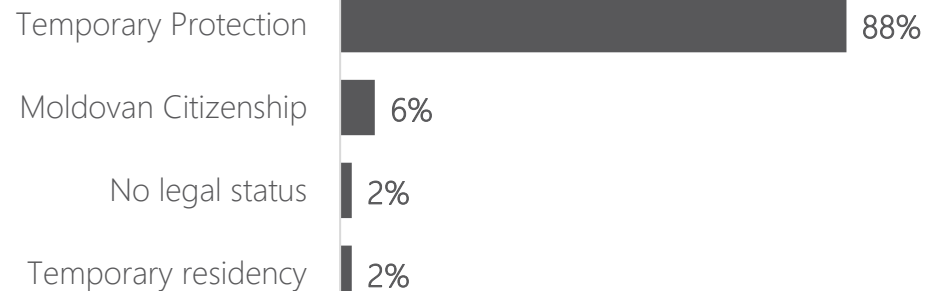


66% of HHs had minors

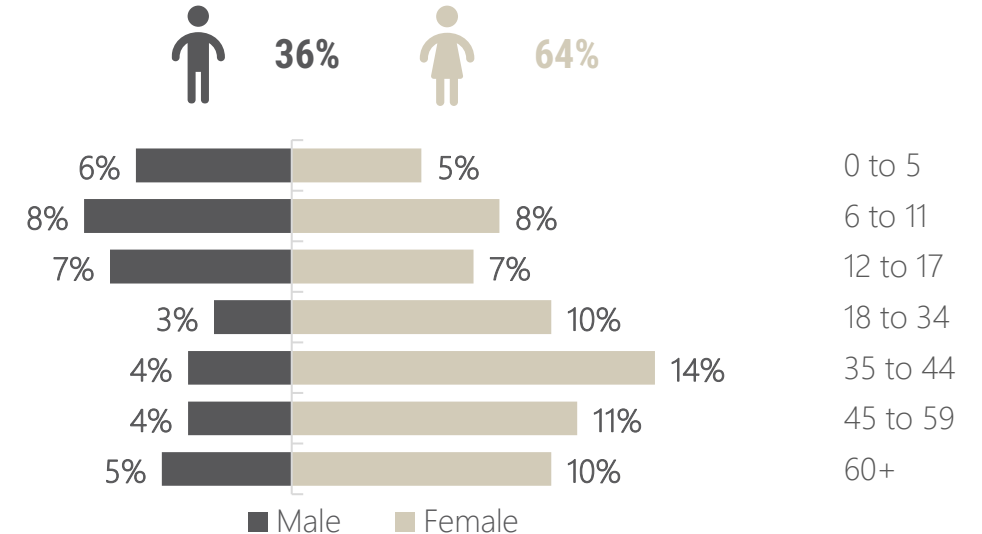


31% of HHs had older persons
(60+ years)

% of HH members by legal status (n=811)



% of HH members by age group and gender (n=811)



3% of HHs had at least one pregnant
or lactating woman



19% of HHs had at least one
member with a disability

A light gray world map is centered in the background. Overlaid on the map is a complex, light gray geometric pattern of interconnected lines forming various sized triangles and polygons. The number '03' is printed in a bold, red, sans-serif font, positioned centrally over the map of Europe and Africa.

03

Main Findings

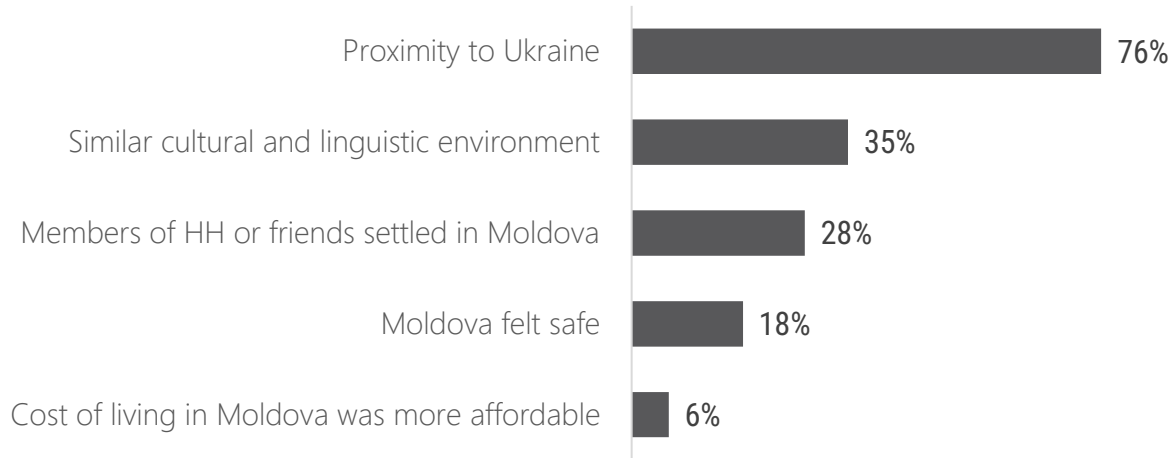


01

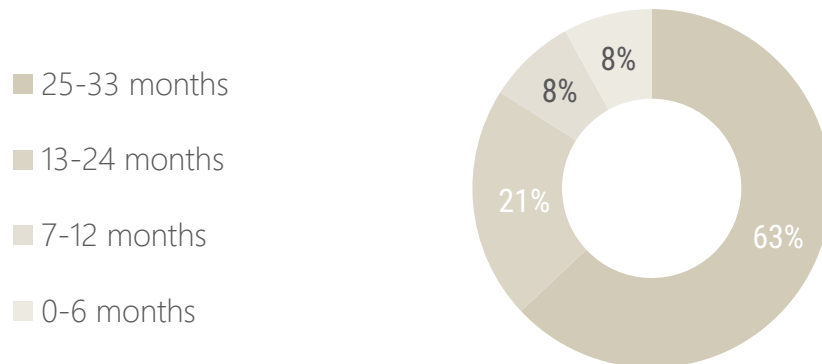
Displacement History

Displacement History

Top 5 reasons HHs settled in Moldova (n=289)**



% of HHs by length of stay in Moldova (n=290)



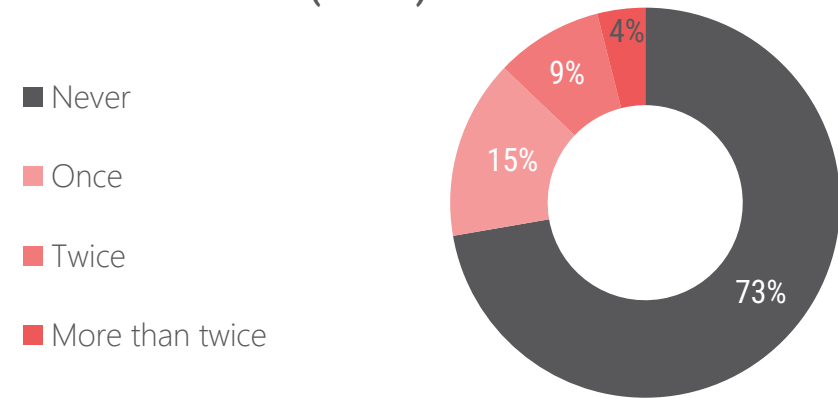
* Percentages may not sum to 100% due to rounding.

** Respondents could select multiple responses.



90% of HHs displaced directly in Moldova (n=290)

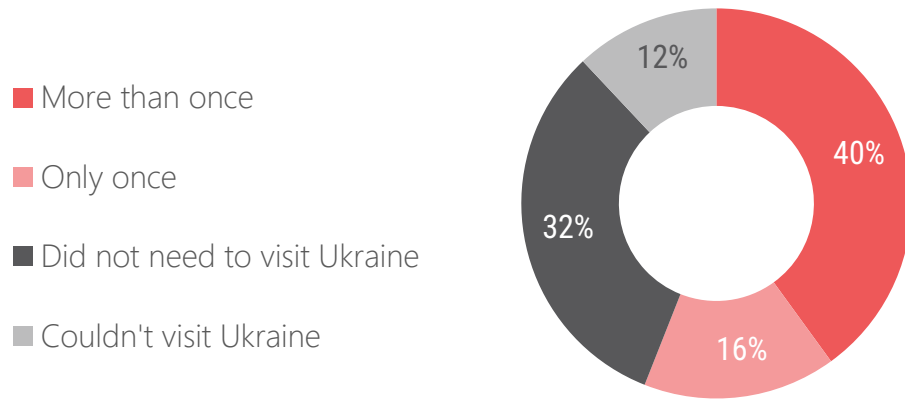
% of HHs by number of resettlements within Moldova (n=290)*



Among HHs that changed their settlement within Moldova at least once (n=80), the most reported reasons for resettling within Moldova were access to appropriate accommodation (57%), access employment opportunities (19%), the cost of living was too high in locality (16%), access education (14%), access healthcare (10%).

Displacement History

% of HH members (aged 18 y.o. and over) who visited Ukraine post-displacement (n=484)



Among HH members, aged 18 years old and over, who were reported to have **visited Ukraine post-displacement** (n=268), the large majority were **women (90%)**.

75% of HHs had at least one member who had returned to Ukraine (n=290)

% of HH members (aged 18 y. o. and over) by reason for going back, among those who returned to Ukraine (n=268)*

- ① Visit relatives (45%)
- ② Obtain documentation (35%)
- ③ Get personal supplies (31%)
- ④ Check on property (28%)
- ⑤ Access healthcare (26%)

*Respondents could select multiple responses.

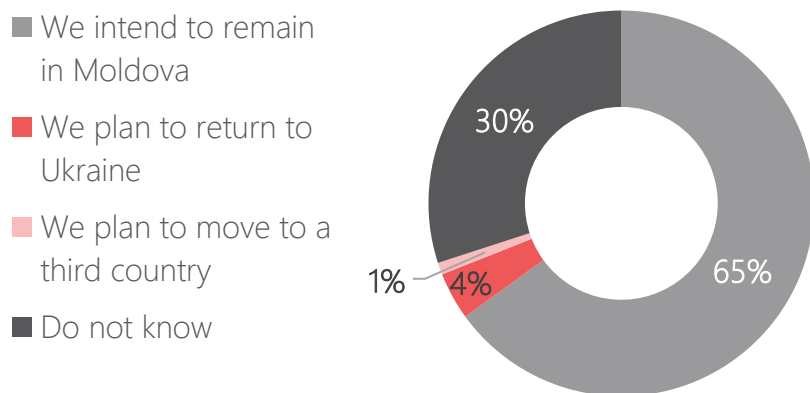


02

Movement Intentions

Movement Intentions

% of surveyed HHs by concrete plans to move within the year after data collection (n=290)



89% of HHs who reported a concrete plan (n=212) indicated their **preferred plan** was the **same** as their reported **concrete plan** for where to live in the future.

Top 5 most reported reasons for not having concrete plans to move within the year after data collection (n=78)*

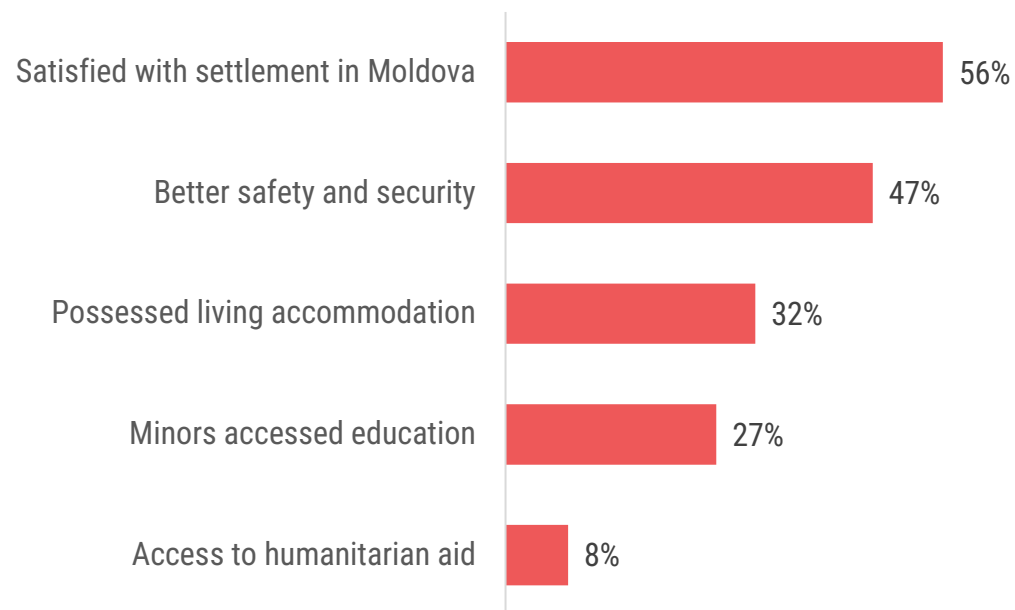


21 out of 22 HHs who reported having a different preferred plan than the concrete plan selected that their **preferred plan** was **to return to their habitual place** of residence in Ukraine. **All** these respondents reported that the main reason for not being able to settle where they preferred is that **conflict was ongoing**.

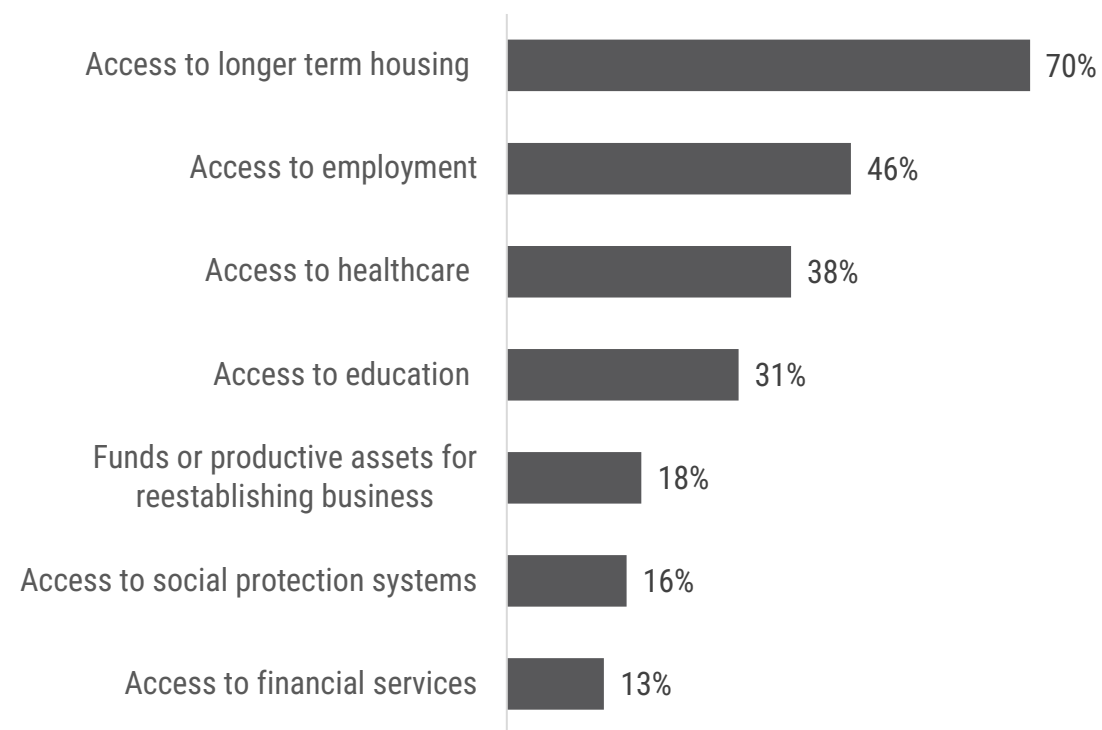
* Respondents could select multiple responses.

Movement Intentions

Top 5 most reported reasons for remaining in Moldova, among HHs who reported that they will remain settled (n=199)*



Top 7 most reported priority concerns for remaining in Moldova, among HHs who reported that they will remain settled (n=199)*



**Respondents could select multiple responses.*

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03

Integration

Policies to Support Long-Term Integration

Key Informants described **Temporary Protection (TP) as the most significant policy introduced by the Moldovan government:**

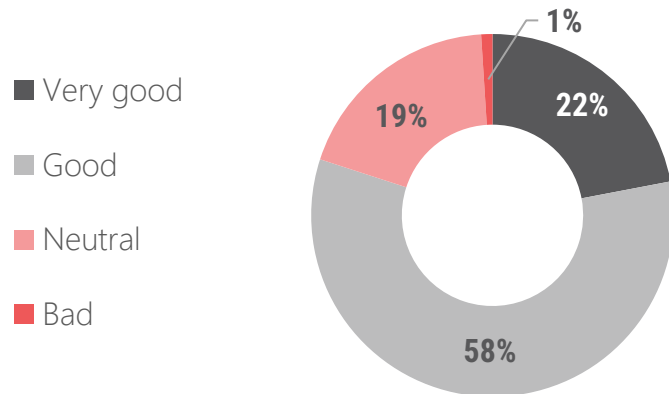
- TP grants access to employment, primary and emergency healthcare, subsidized medications and medical devices, education for refugee children, and other social assistance services
- KIs noted the uptake of TP has been high thanks to government measures that have streamlined the process of obtaining and regularizing this status.

Key Informants also highlighted the importance of Romanian language courses in facilitating the integration of refugees in Moldova:

- **Proficiency in Romanian was highlighted by respondents as a challenge for refugee integration**, particularly as it relates to securing employment
- **Ministry of Education and Research (MER) formalized and approved Romanian language courses** for adults which were offered through universities and included free spaces for refugees
- **Ukrainian refugees were also included in Moldova's national Romanian language training program**

Integration

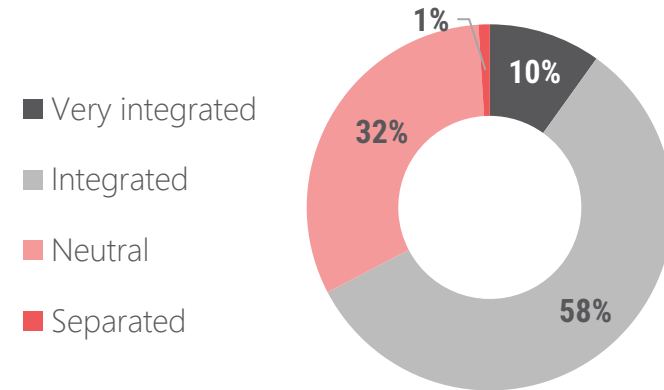
% of HHs by relationship between host and refugee community (n=290)



Over half of the respondents reported feeling **included** in the decision-making within the refugee response in Moldova: **47%** **somewhat included** and **11%** **very included**. However, a significant number still **reported feeling excluded** in the decision-making: **25%** **somewhat excluded** and **17%** **very excluded**.

* Percentages may not sum to 100% due to rounding.

% of HHs by degree of integration into the host community (n=290)*



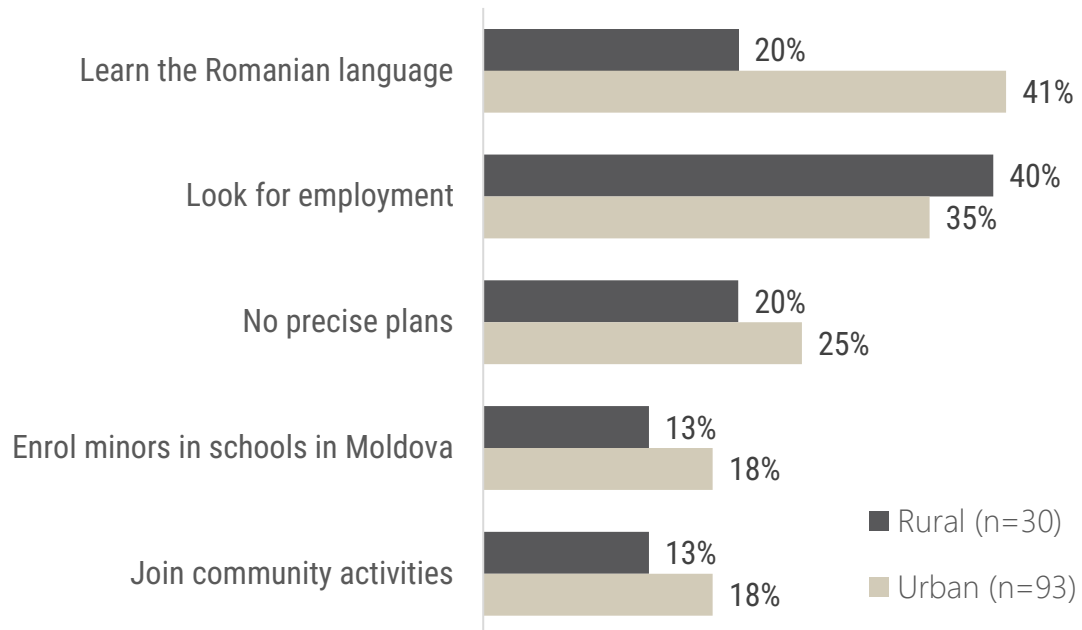
60% of the HHs reported having a trusted support person in the community (n=290)

Respondents from **rural areas** (n=59) were more likely to report that they had a trusted support person in the community (**80%**) than respondents from **urban areas** (n=231) (**58%**).

Integration

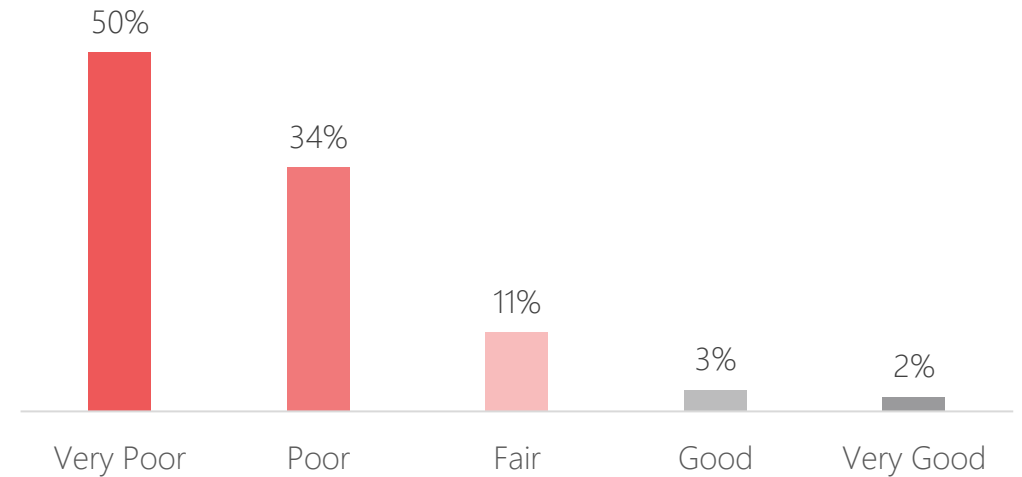
63% of HHs intended to integrate into the community, among those planning on remaining in Moldova (n=199)

Top 5 intended plans for integration, among those intending to integrate, by rural urban (n=123)*



*Respondents could select multiple responses.

% of HH members by Romanian language proficiency, by gender (aged 3 y. o. and over) (n=764)



Of all the assessed HHs (n=290), **10%** had at least one member with good or very good Romanian language proficiency (aged 3 y. o. and over). **29%** of them had at least one member with at least fair Romanian language proficiency.



04

Factors Influencing Movement Intentions

Accommodation

Employment

Income and Livelihoods

Healthcare

Education

Factors influencing movement intentions

% of HHs by top 4 reasons for remaining in Moldova, among HHs intending to remain in Moldova for the 12 months following data collection (n=199)*



**Respondents could select multiple responses.*

Top 4 priority concerns to remain in current location, among HHs intending to remain in Moldova for the 12 months following data collection (n=199)*



Access to/longer term provision of housing (70%)



Access to employment (46%)



Access to healthcare (38%)



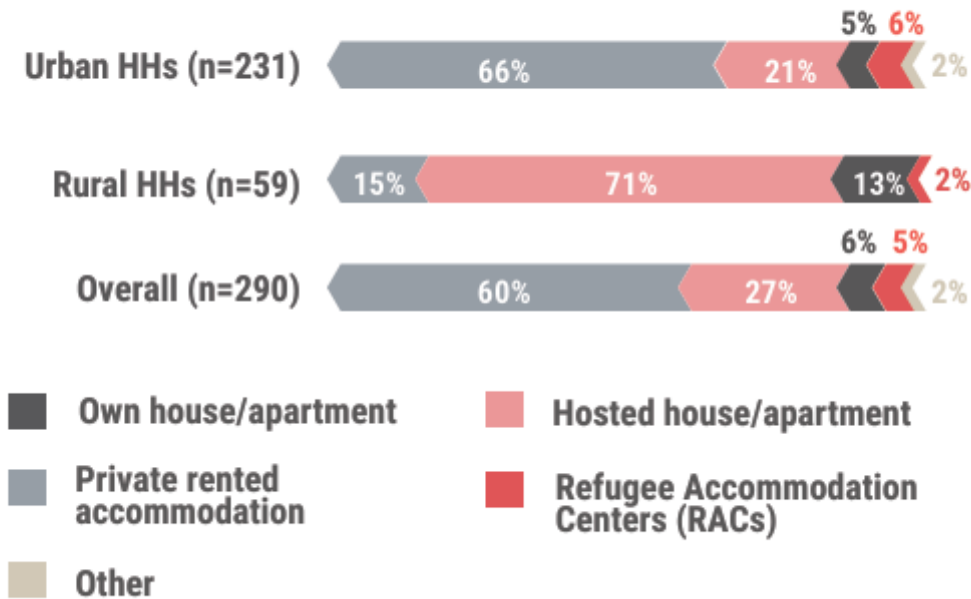
Access to education (31%)



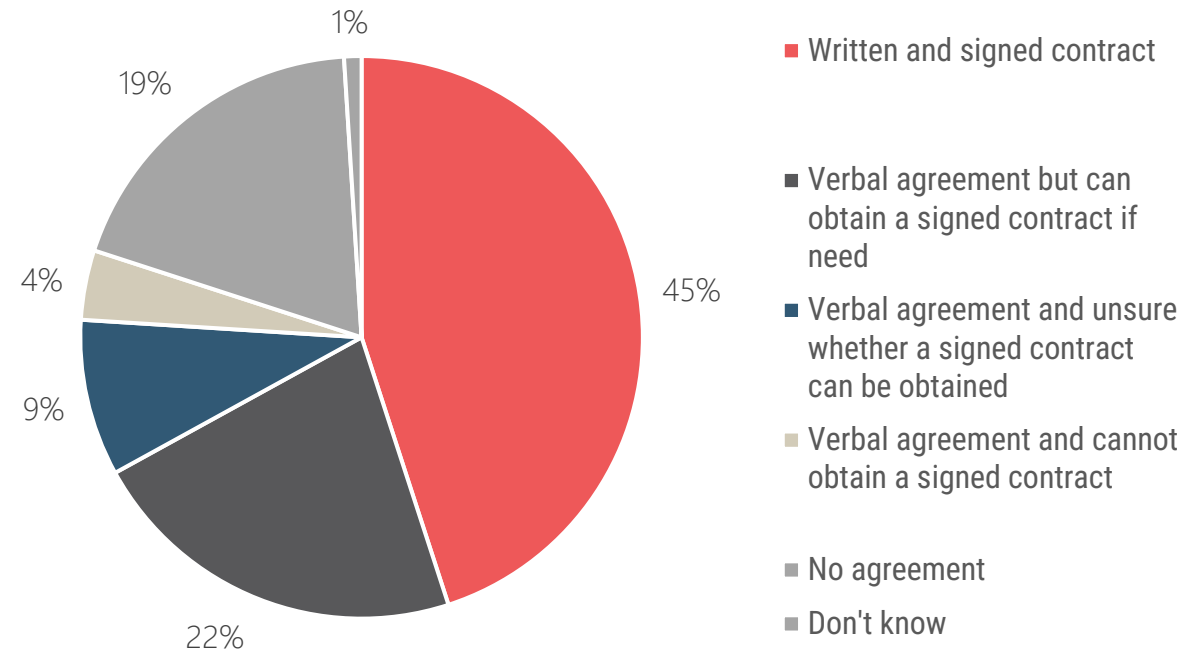
Accommodation

Among HHs intending to remain in Moldova (n=199), 70% identified access to longer-term or permanent housing as their primary concern

% HHs by type of accommodation (n=290)



% of HHs, living in hosted or privately rented accommodation, by type of accommodation agreement (n=249)

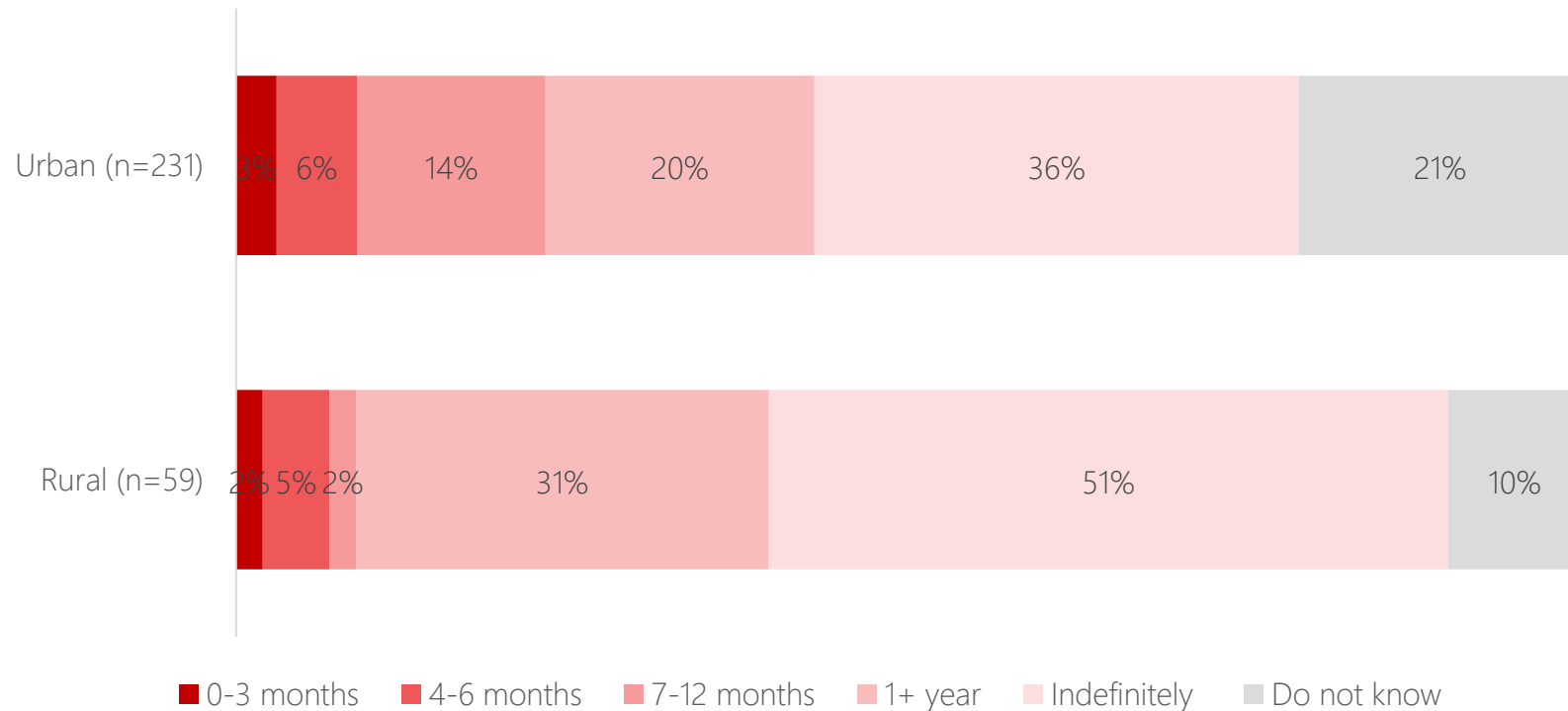




Accommodation

Slightly more than half of HHs (59%) anticipated being able to stay in their accommodation long-term

% of HHs by anticipated length of stay in their current accommodation, by accommodation type (n=290)*



HHs living in hosted accommodation generally perceived they could stay in their accommodation long-term, with **57% of HHs living with hosts (n=48) anticipating they could stay indefinitely and 24% for 1+ years**

* Percentages may not sum to 100% due to rounding.

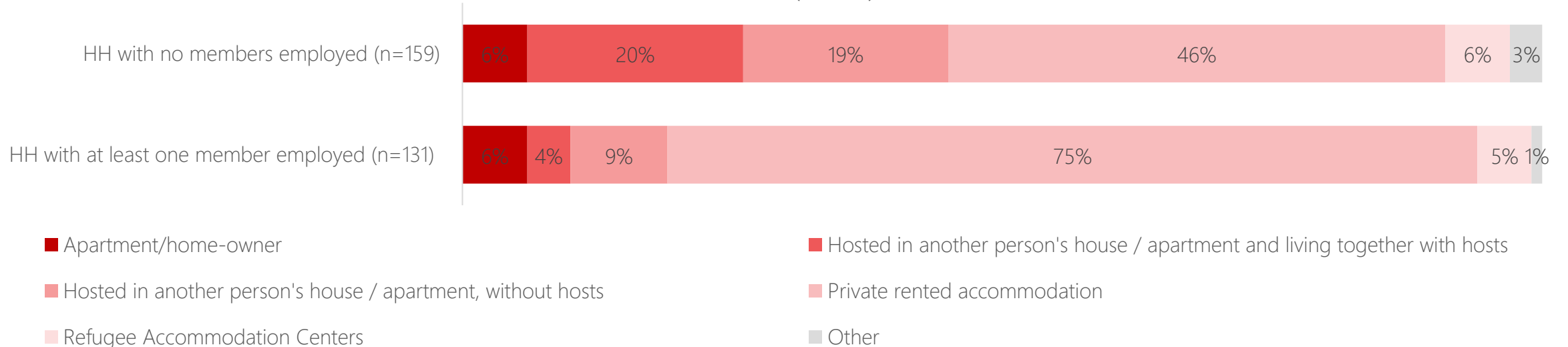


Accommodation

Housing affordability emerged as a key factor affecting access to more long-term or permanent housing. When asked about the challenges they faced in securing their current accommodation, **41% of HHs cited the cost of accommodation as a barrier.**

Findings suggest a **relationship between a HH's employment status and their accommodation arrangement**, indicating **increasing access to employment opportunities and addressing the cost of accommodation barriers could help refugee HHs secure more long-term housing.**

% of HHs by accommodation type, by whether at least one HH member was employed at the time of data collection (n=290)*



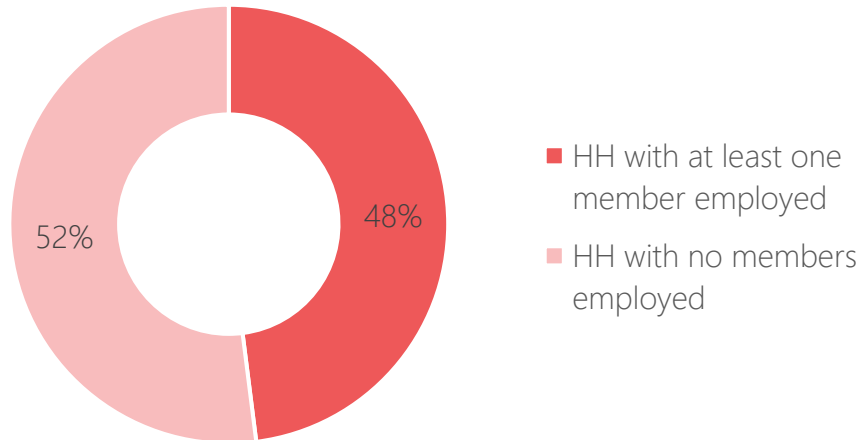
* Percentages may not sum to 100% due to rounding.



Employment

Among HHs intending to remain in Moldova (n=199), 46% identified employment as a primary concern for remaining in their current location.

% of HHs with at least one HH member employed
(n=290)



Men were more likely to be employed full-time, with **26% of male HH members aged 16 and above (n=143) employed** compared to just **12% of women aged 16 years and above (n=373)**

51% of HH members aged 16 and older (n=262) who were part of the workforce reported **no barriers to finding a job.** Other barriers reported include:

1

Lack of proficiency in Romanian (25%)

2

High competition and limited job availability (11%)

3

Availability of only low-skilled, socially degrading, or low-paying jobs (11%)

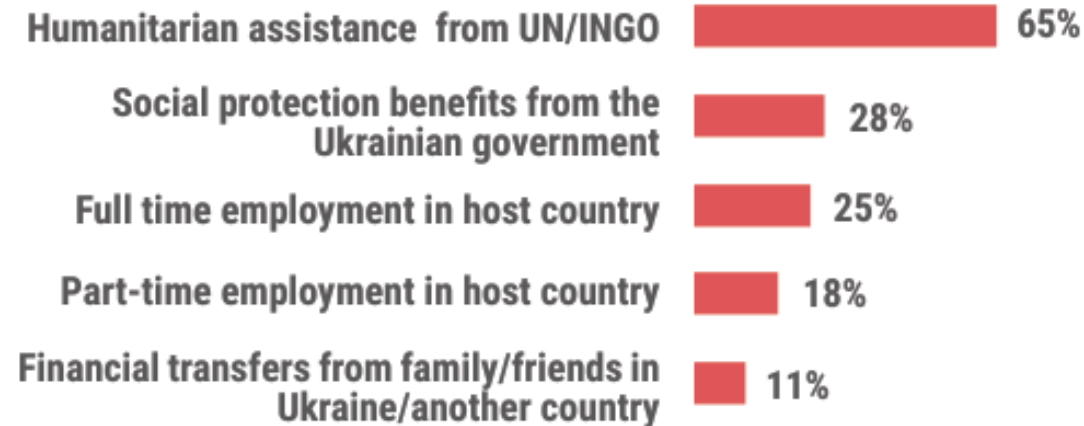
Key Informants highlighted the limited availability of suitable job opportunities as a barrier to employment



Income and Livelihoods

Surveyed HHs appeared to experience financial vulnerability and challenges integrating economically in Moldova, with **over half of respondents (65%) reporting relying on humanitarian assistance as one of their main sources of income.**

% of HHs by main sources of income in the 30 days prior to data collection (n=290)*



Key Informants highlighted the focus of the response has shifted to helping refugees become self-sufficient through employment and income-generating activities, reflected in the **gradual reduction of humanitarian cash programs.**

Prioritizing a transition to **more sustainable sources of income** will be instrumental to supporting refugees' long-term integration in Moldova

* Respondents could select multiple responses.



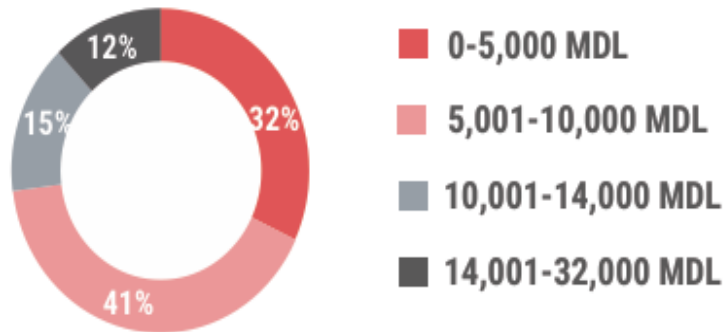
Income and Livelihoods

Median HH expenditures exceeded median HH income by **2000 MDL**, suggesting HHs face a **negative income-expenditure gap**.

Median **HH income** in the 30 days prior to data collection (n=202): **7,000 MDL**

Median **HH expenditures** in the 30 days prior to data collection (n=202): **9,000 MDL**

% of HHs by reported income in the last 30 days before data collection, in ranges (n=202)



% of HHs by higher reported expenses than income reported in the last 30 days prior to data collection, by employment within the HH (n=152)*

- Reported expenses lower than reported income
- Reported expenses equal to reported income
- Reported expenses higher than reported income

HH with no members employed (n=79)



HH with at least one member employed (n=73)



* Percentages may not sum to 100% due to rounding.



Healthcare

Among HHs intending to remain in Moldova (n=199), 38% identified healthcare as a primary concern for remaining in their current location.

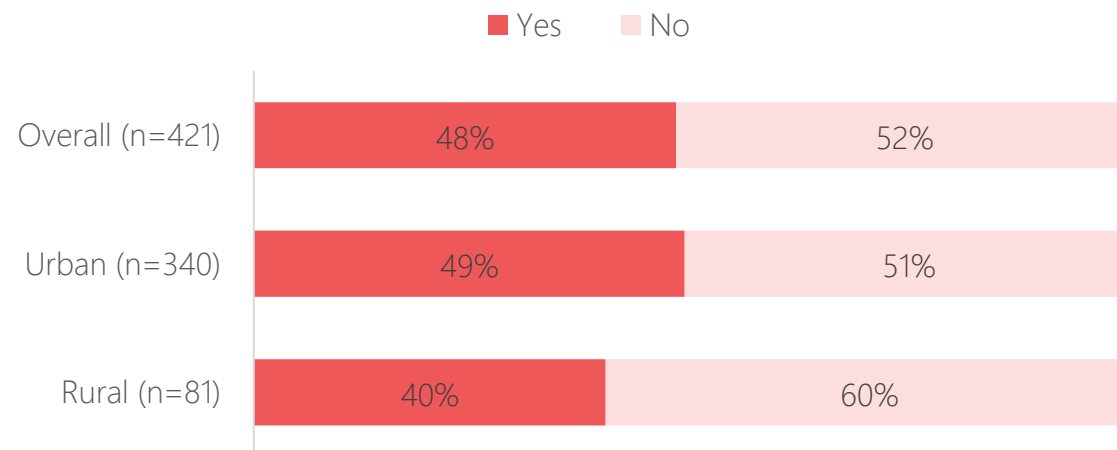
Over half of HH members (**56% of n=811**) reportedly needed to access healthcare services in the 3 months prior to data collection

97%

of those who needed to access healthcare services in the 3 months prior to data collection (n=437) **were able to access the services they needed**

81% of HH members who needed to access healthcare services (n=437) faced **no barriers**.

% of HH members who needed to pay to access healthcare services, by rural urban



Key Informants highlighted that certain specialized care is not covered under TP. As a result, HH members requiring specialized care may need to pay out-of-pocket.



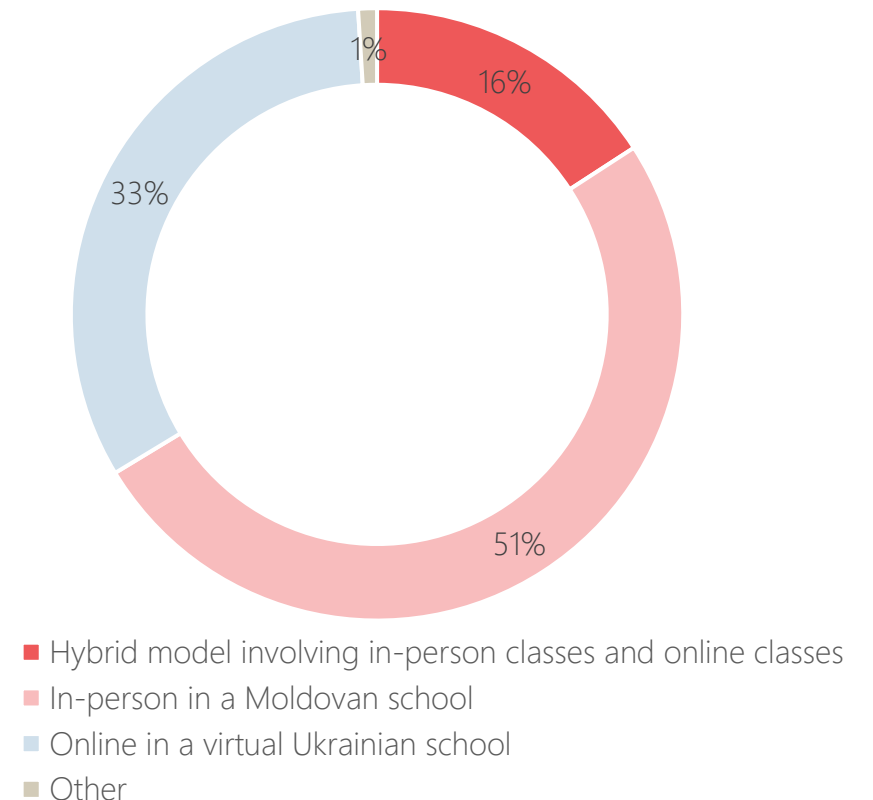
Education

Among HHs intending to remain in Moldova (n=199), 31% identified education as a top concern for remaining in their current location.

Key Informants noted that access to education for refugee children has been a priority in the response and has been facilitated through various initiatives:

- Ministry of Education and Research issued an instruction in September 2023 announcing that a Ukrainian child's legal status **does not** hinder their access to education in Moldova
- Elimination of the requirement for official school records
- Provision of both in-person and on-line learning options by the Moldovan government in collaboration with UNICEF

% of HH members in primary or secondary education (aged 2 to 18) by format of education (n=192)*



* Percentages may not sum to 100% due to rounding.



Education

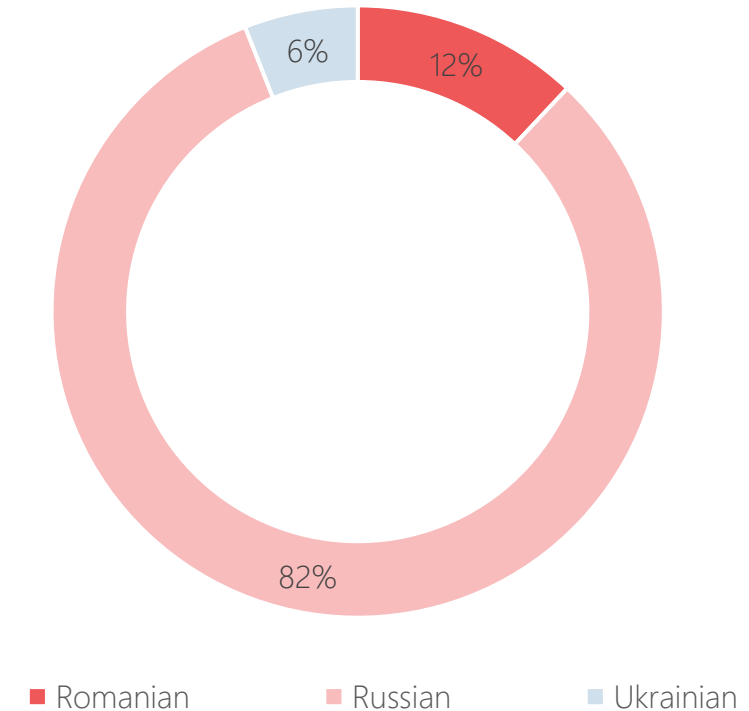
Key Informants highlighted that facilitating refugee children's access to education has generally been successful. However, respondents noted some challenges persist, including:

- Language barriers
- A preference for online learning options
- Limited opportunities for refugee children with disabilities

67%

Of HH members (aged 2-18) cited **no barriers** to accessing Moldovan schooling.

% of HH members (aged 2 to 18) by primary language of education in Moldovan school, among those attending a Moldovan school (n=137)



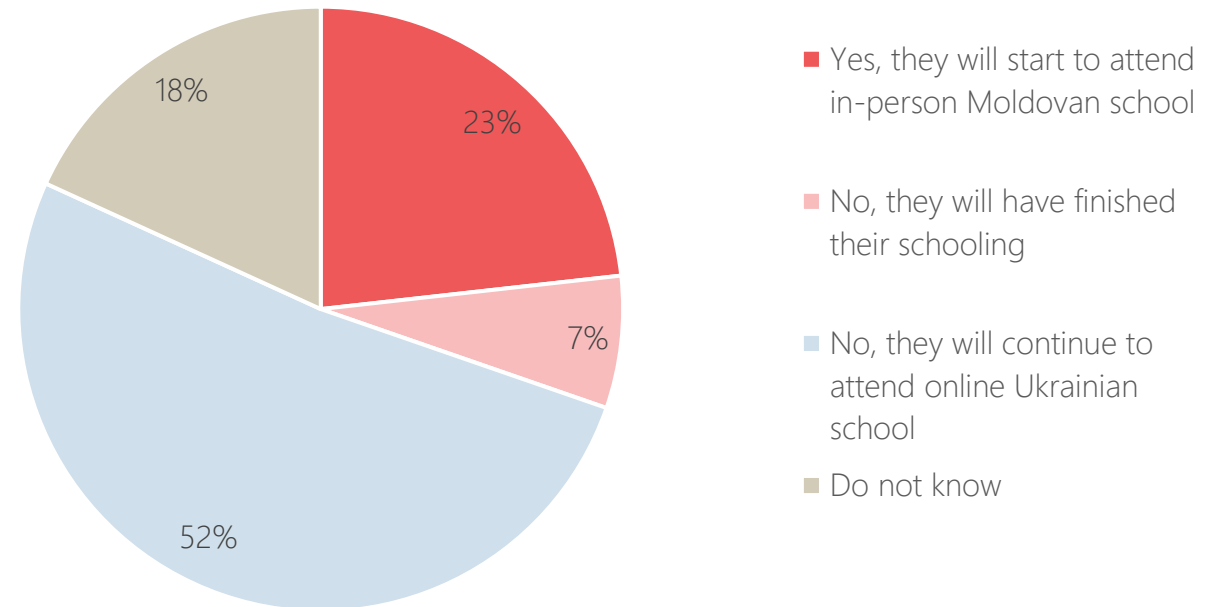


Education

These trends suggest that while enrollment in Moldovan schools is gradually increasing, enrollment in online Ukrainian schools will persist in the 2025-2026 academic year.

Given the low reported barriers to accessing Moldovan schooling, **continued enrollment in Ukrainian schools is likely driven by family preference rather than policy-related obstacles.**

% of HH members (aged 2 to 18) by intention to enroll in a Moldovan school for in-person classes in Autumn 2025, among HH members (aged to 18) not currently enrolled in an in-person Moldovan school (n=59)



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04

Key Messages

Key Messages

- 1 Over half of the surveyed HHs (65%) concretely intended to remain in Moldova in the 12 months after data collection.** A third however, did not know what their concrete plan was (30%).
- 2 Access to longer-term housing (70%) and employment opportunities (46%)** were the most reported factors by HHs to facilitate their continued stay in Moldova.
- 3 Employment appeared to have a notable effect on integration.** Compared to HHs with no members employed, those with at least one member employed reported higher rates of living in long-term accommodation, a positive income expenditures gap, and lower rates of humanitarian assistance as a primary income source.

Thank you for your attention!



Olga Cimpan, olga.cimpan@reach-initiative.org

Tara McCoy, tara.mccoy@impact-initiative.org



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