

THE WAR IN UKRAINE: WHERE THE PUBLIC STANDS

An Ipsos-Institute for the Study of War Conference

Washington, DC – January 24, 2023



GAME CHANGERS



THE WORLD'S RESPONSE TO THE CONFLICT

What Ipsos's global survey research tells us

Darrell Bricker, CEO, Global Public Affairs, Ipsos

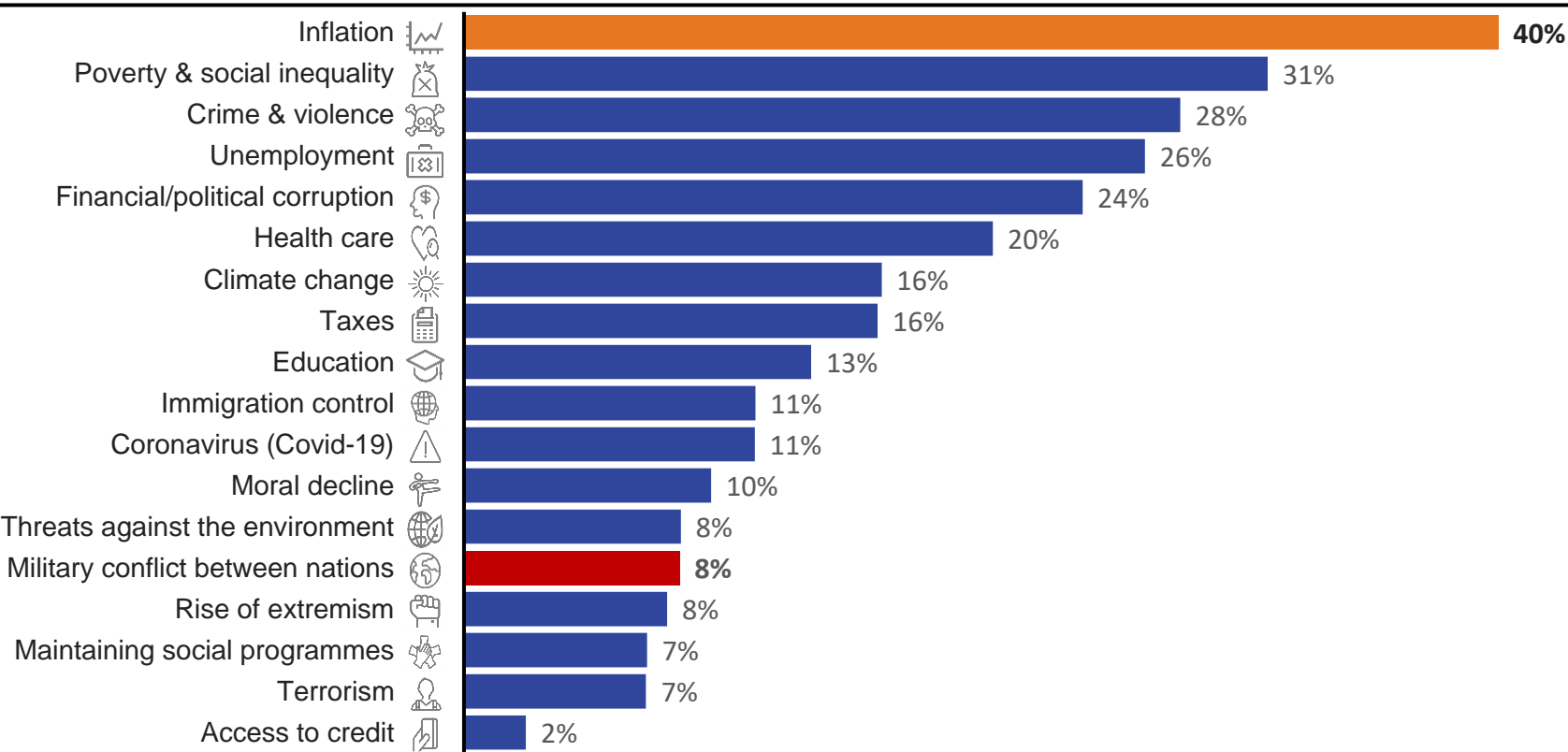
GAME CHANGERS



WORLD WORRIES: THE FULL LIST

Q. Which three of the following topics do you find the most worrying in your country?

% mentioned in December 2022 (29-country average)



This full ranking of the 18 issues in our survey gives an overview of what people in 29 countries worry about today.

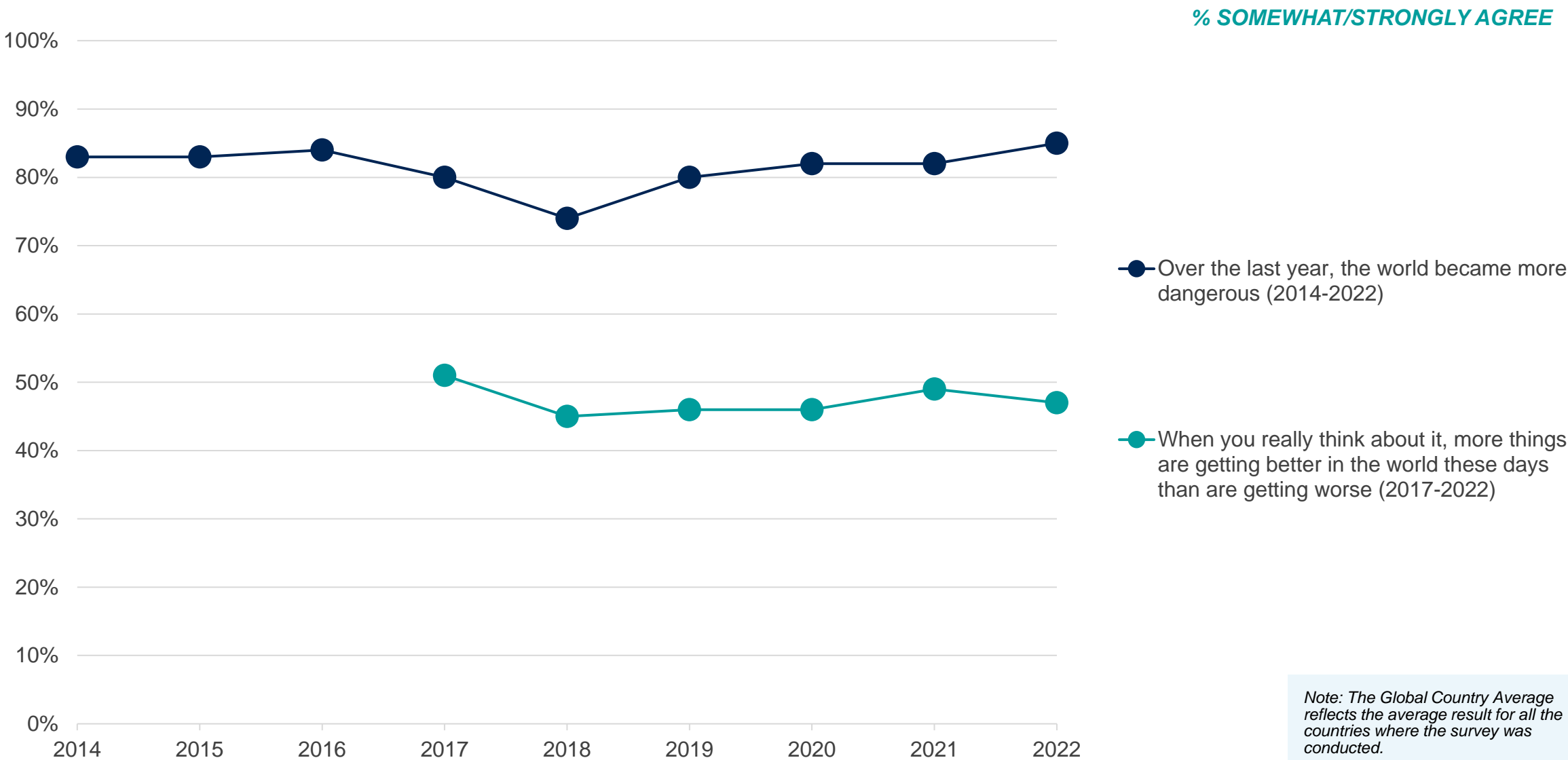
Worry about inflation has fallen for the first time in 17 months, with December's score 2pp lower than last month. Rising prices still remain the top global concern, with four in ten choosing it as a worry.

Looking back at where things were at the beginning of 2022, inflation didn't make the top five worries. They were Covid, inequality, unemployment, corruption and crime & violence.

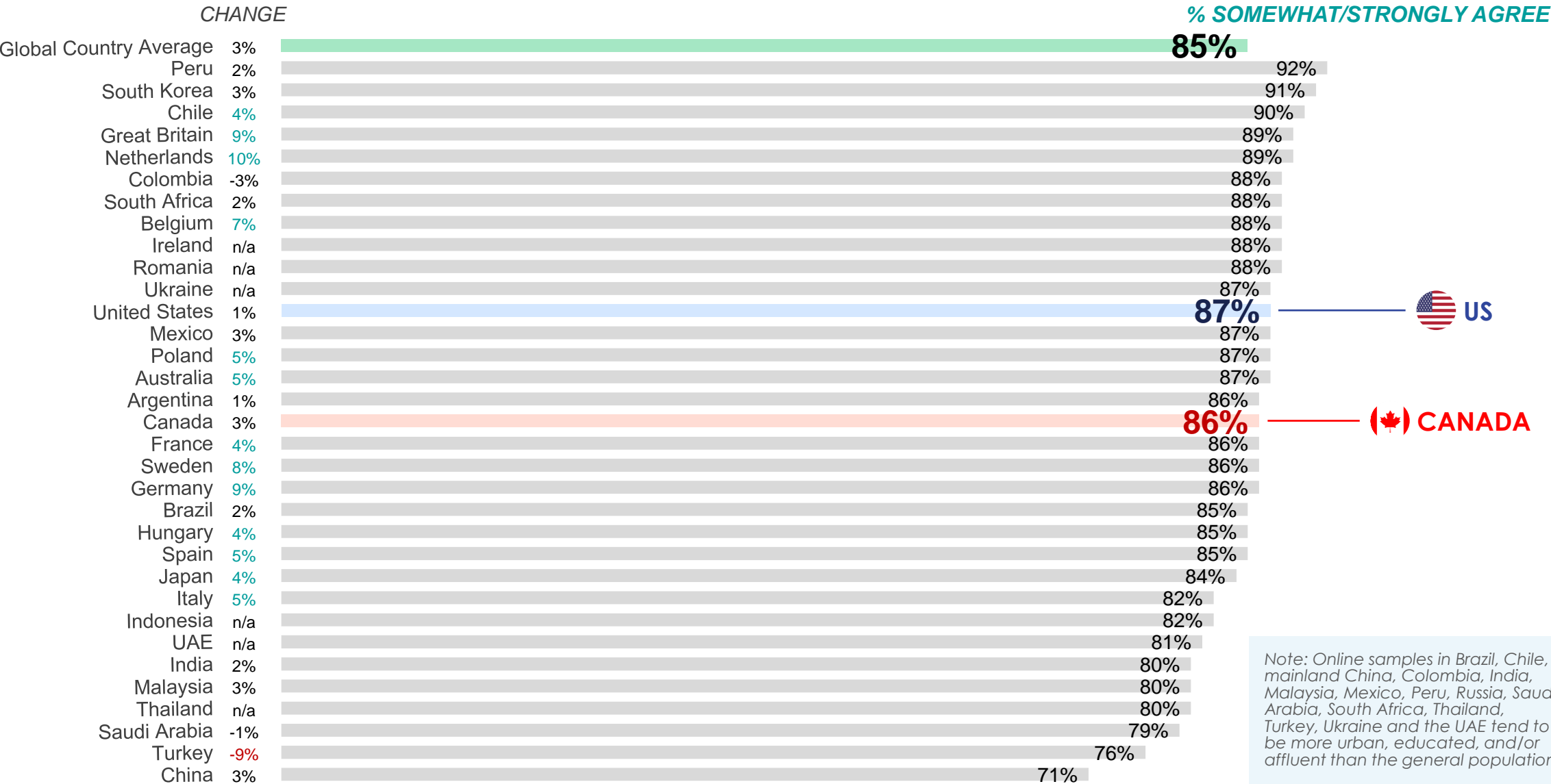
Base: 19,504 adults aged 16-74 in 29 countries, November 25 - December 9, 2022.
Source: Ipsos Global Advisor. Global score is a Global Country Average. See methodology for details.



ATTITUDES ABOUT THE STATE OF THE WORLD OVER TIME



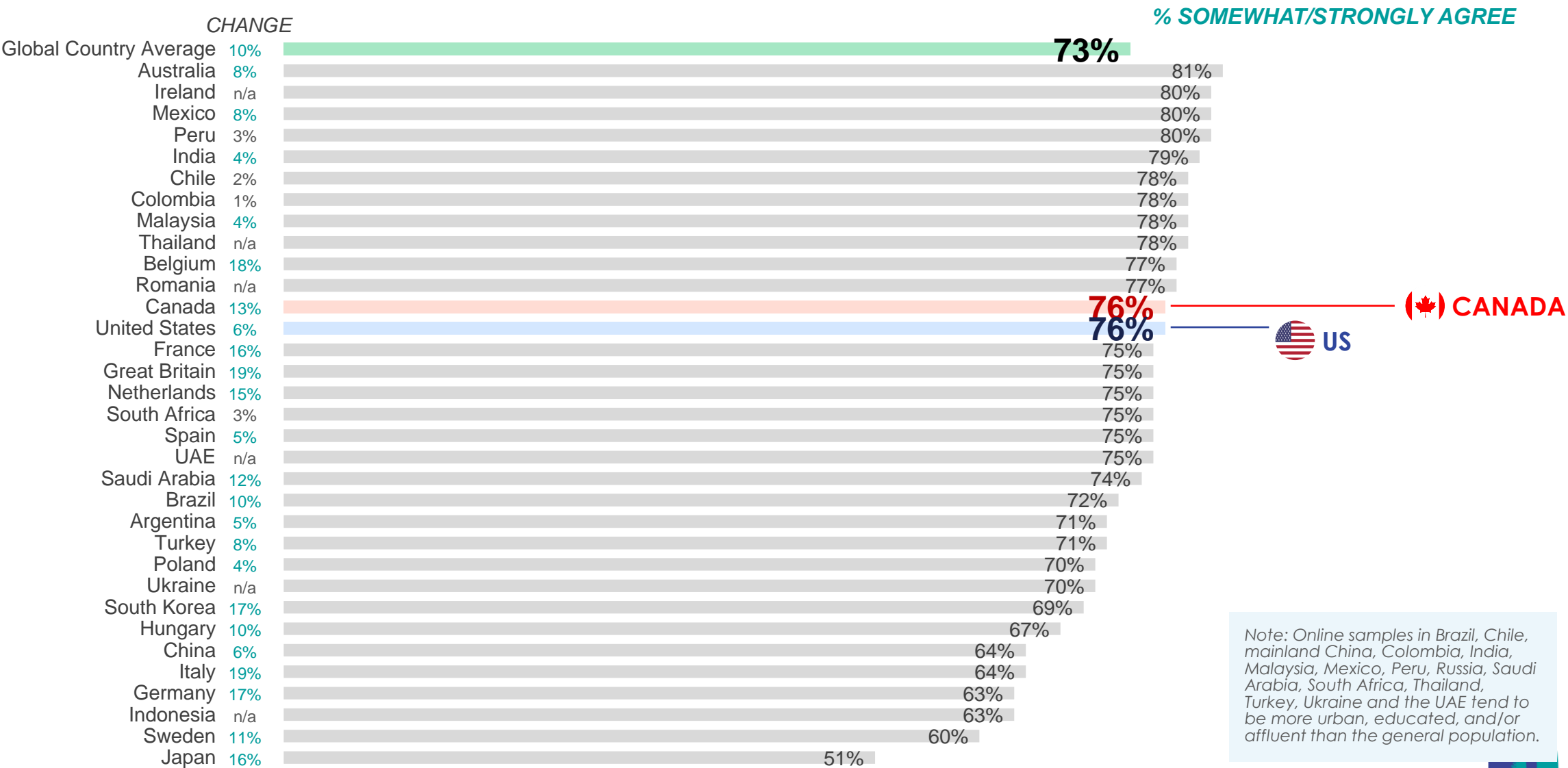
OVER THE LAST YEAR THE WORLD BECAME MORE DANGEROUS



Note: Online samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, Thailand, Turkey, Ukraine and the UAE tend to be more urban, educated, and/or affluent than the general population.

WORLD CONFLICT INVOLVING SUPERPOWER

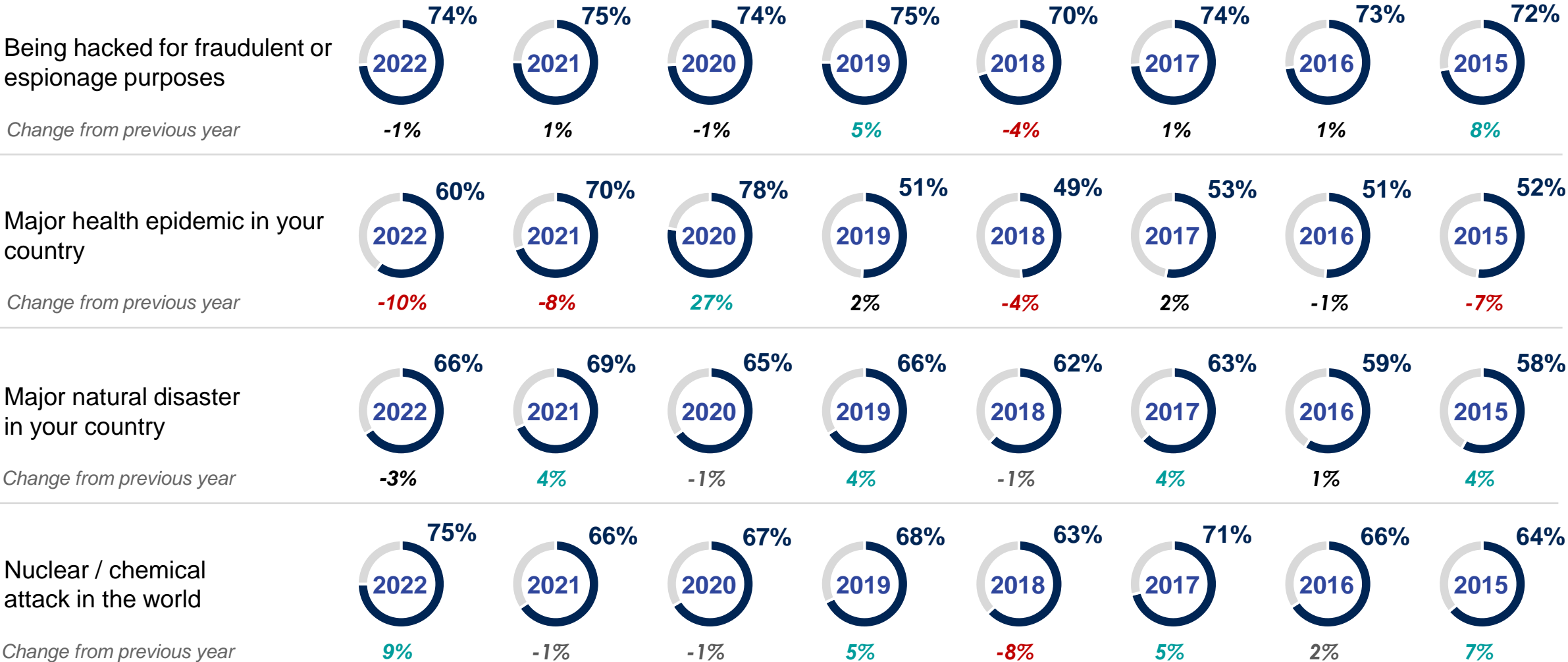
Q: I expect in the next 25 years we could see another world conflict involving superpowers similar to World Wars 1 & 2



GLOBAL THREAT ASSESSMENT

Q: How real do you feel the threat is of any of the following happening in the next twelve months?

% A VERY/SOMEWHAT A REAL THREAT



Note: The Global Country Average reflects the average result for all the countries where the survey was conducted.
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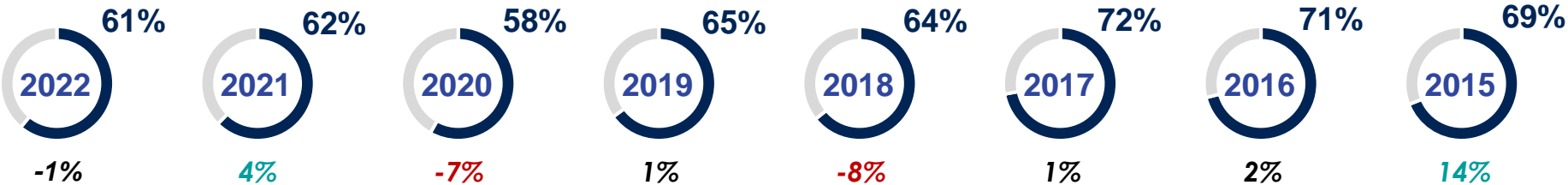
GLOBAL THREAT ASSESSMENT

Q: How real do you feel the threat is of any of the following happening in the next twelve months?

% A VERY/SOMEWHAT A REAL THREAT

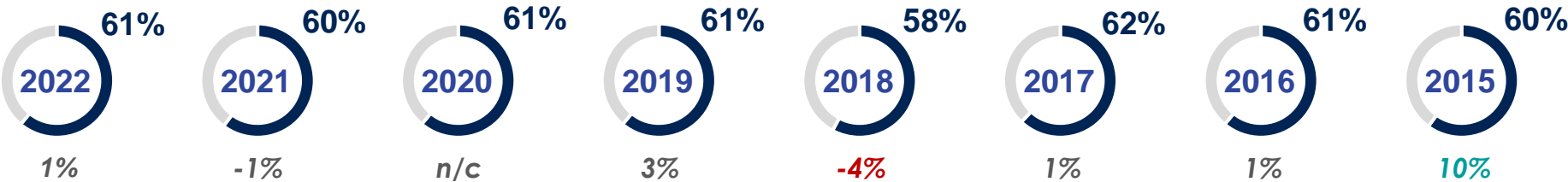
Terrorist attack in your country

Change from previous year



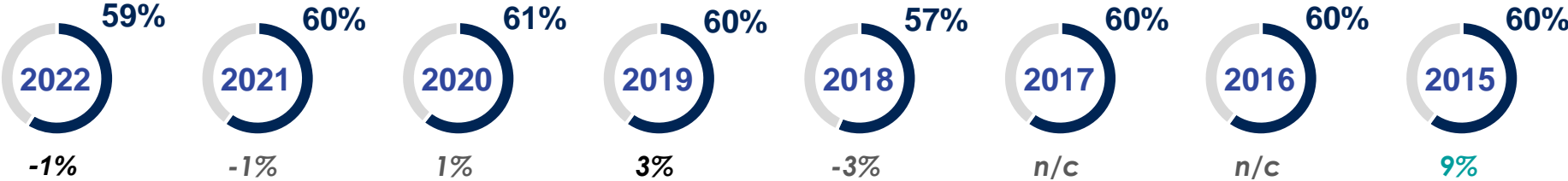
The personal safety and security for you or your family members being violated

Change from previous year



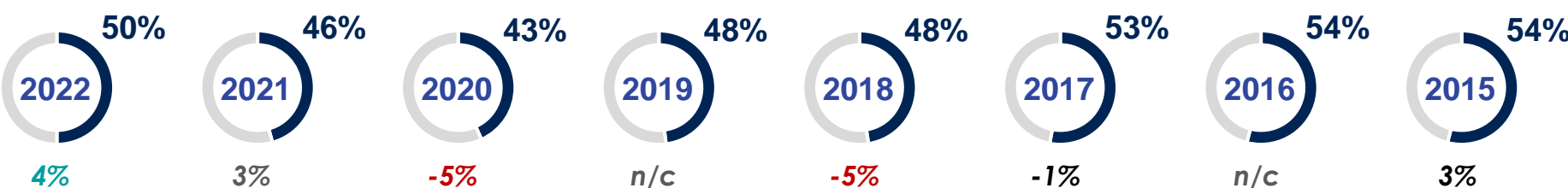
A violent conflict breaking out between ethnic or minority groups in your country

Change from previous year



Your country entering armed conflict with another country

Change from previous year



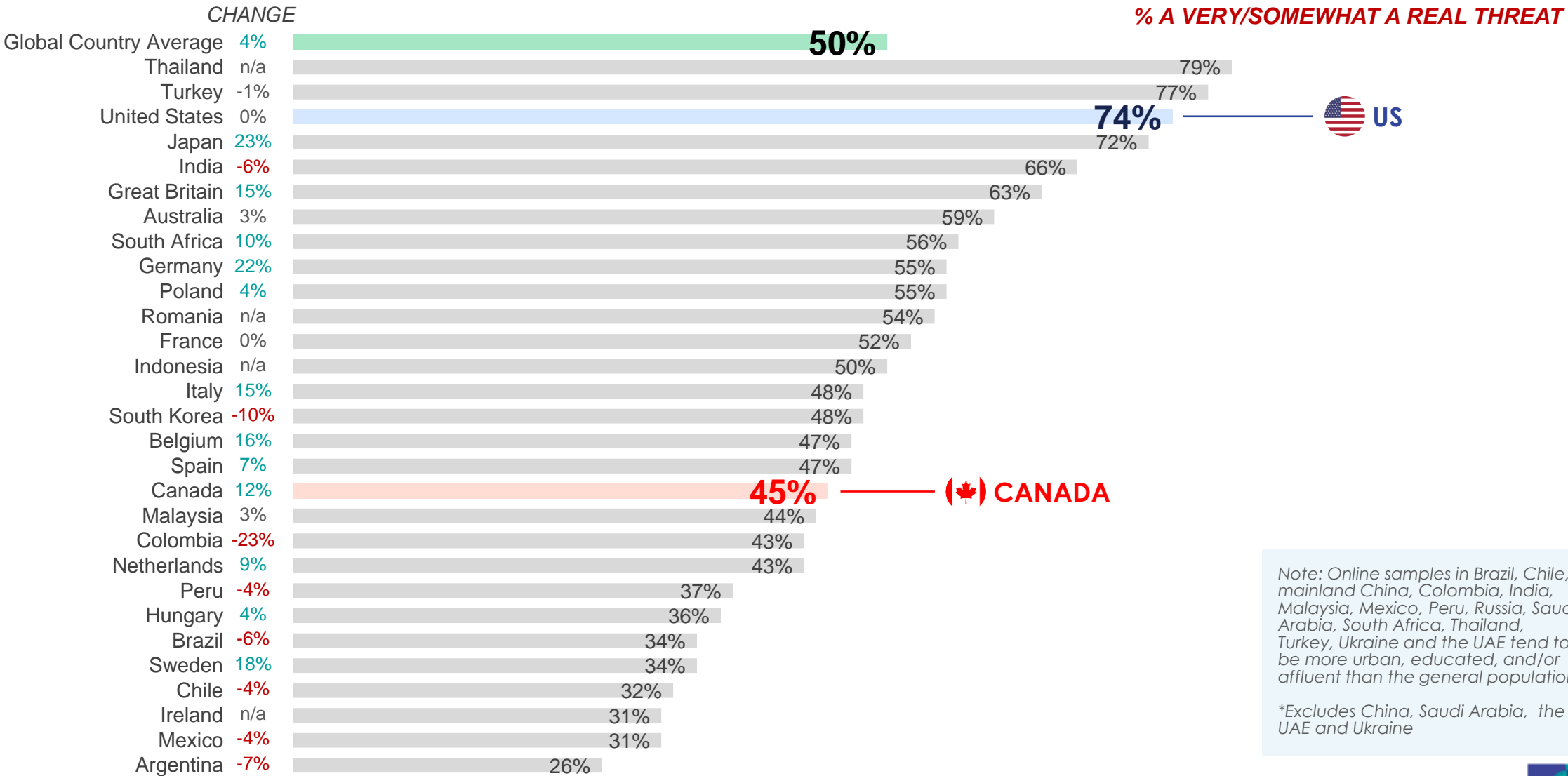
Note: The Global Country Average reflects the average result for all the countries where the survey was conducted.

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COUNTRY BEING INVOLVED IN AN ARMED CONFLICT WITH ANOTHER NATION

Q: How real do you feel the threat is of [country] being involved in an armed conflict with another nation in the next twelve months?

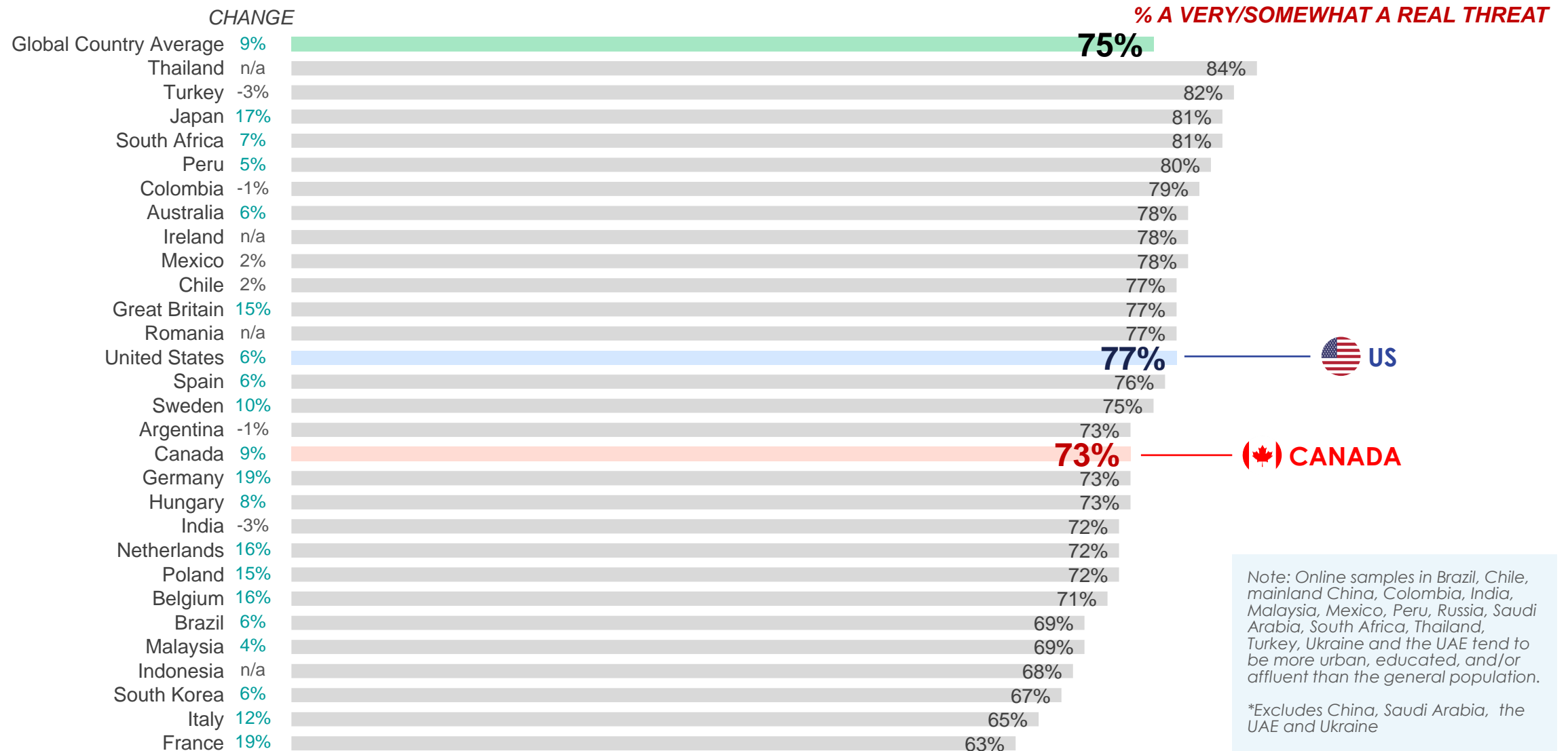


Note: Online samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, Thailand, Turkey, Ukraine and the UAE tend to be more urban, educated, and/or affluent than the general population.

*Excludes China, Saudi Arabia, the UAE and Ukraine

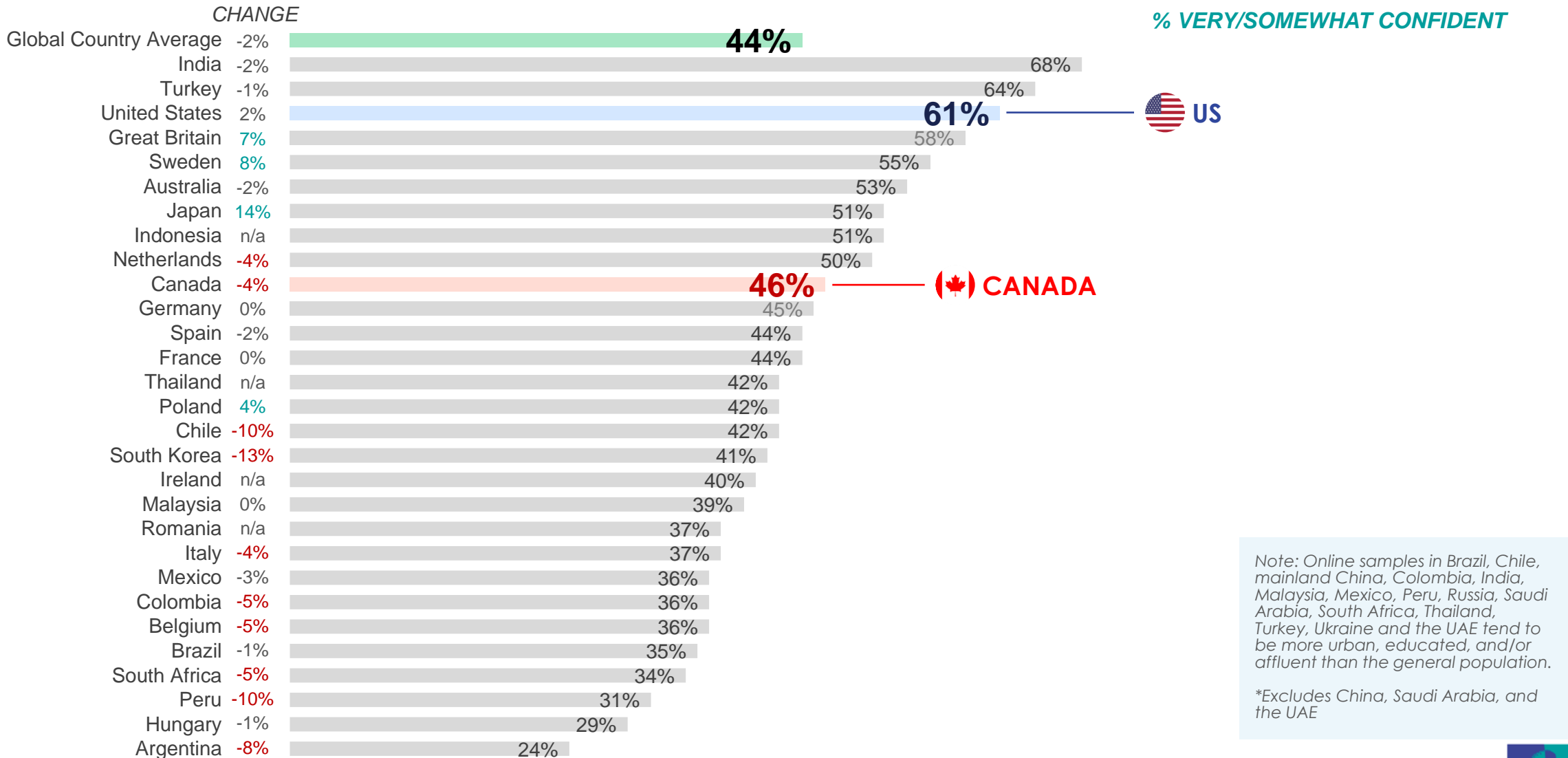
A NUCLEAR, BIOLOGICAL OR CHEMICAL ATTACK SOMEWHERE IN THE WORLD

Q: How real do you feel the threat is of a nuclear, biological or chemical attack taking place somewhere in the world in the next twelve months?



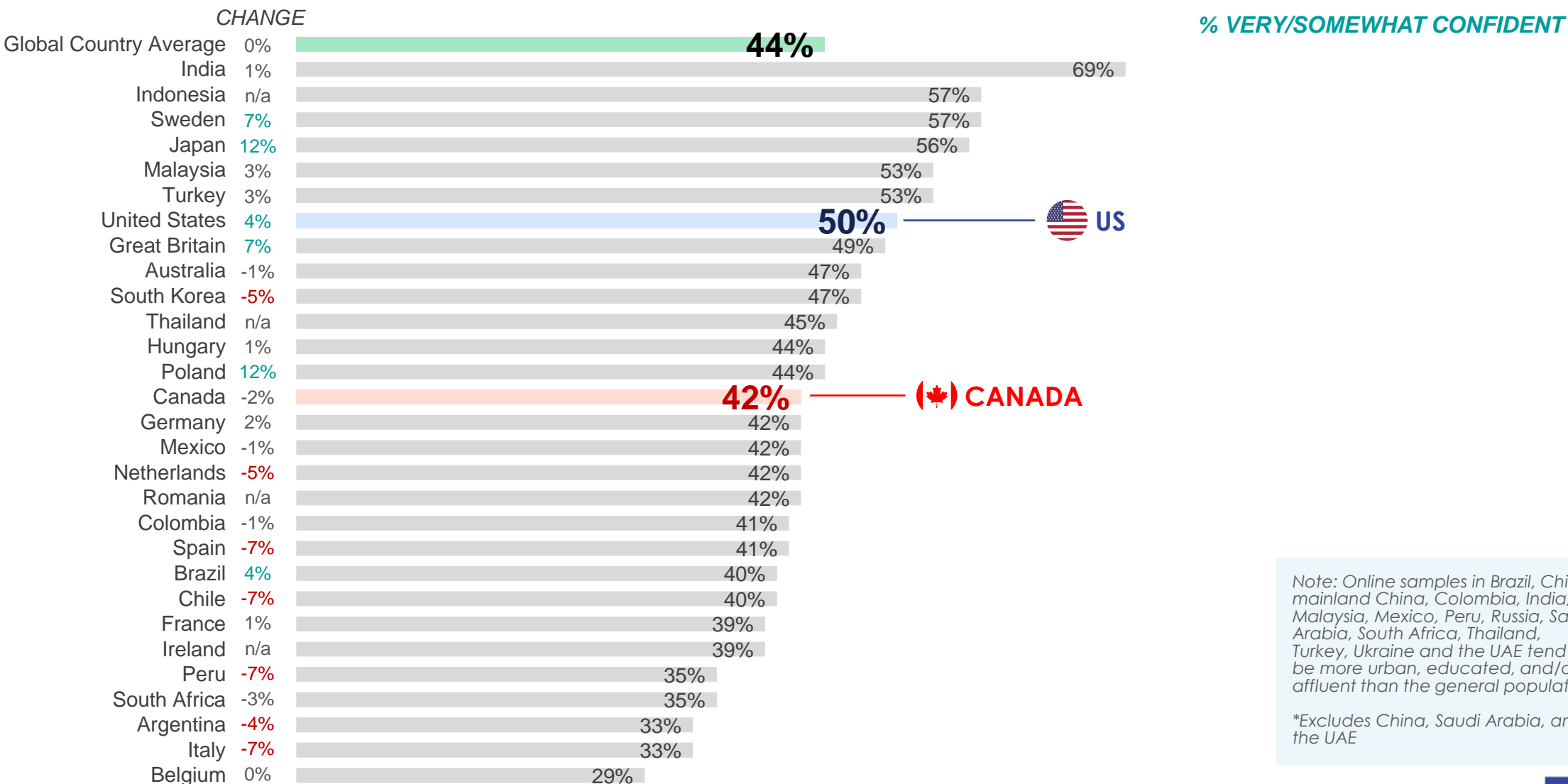
CONFIDENCE IN GOVERNMENT RESPONSE: ARMED CONFLICT

Q: If your country is involved in an armed conflict with another nation in the next twelve months, how confident are you that the appropriate levels of security and protection could be provided by your government or its agencies could respond effectively?



CONFIDENCE IN GOVERNMENT RESPONSE: NUCLEAR, BIOLOGICAL OR CHEMICAL ATTACK

Q: If a nuclear, biological or chemical attack took place somewhere in the world in the next twelve months, how confident are you that the appropriate levels of security and protection could be provided by your government or its agencies could respond effectively?




















Note: Online samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, Thailand, Turkey, Ukraine and the UAE tend to be more urban, educated, and/or affluent than the general population.

*Excludes China, Saudi Arabia, and the UAE

WORLD INFLUENCERS

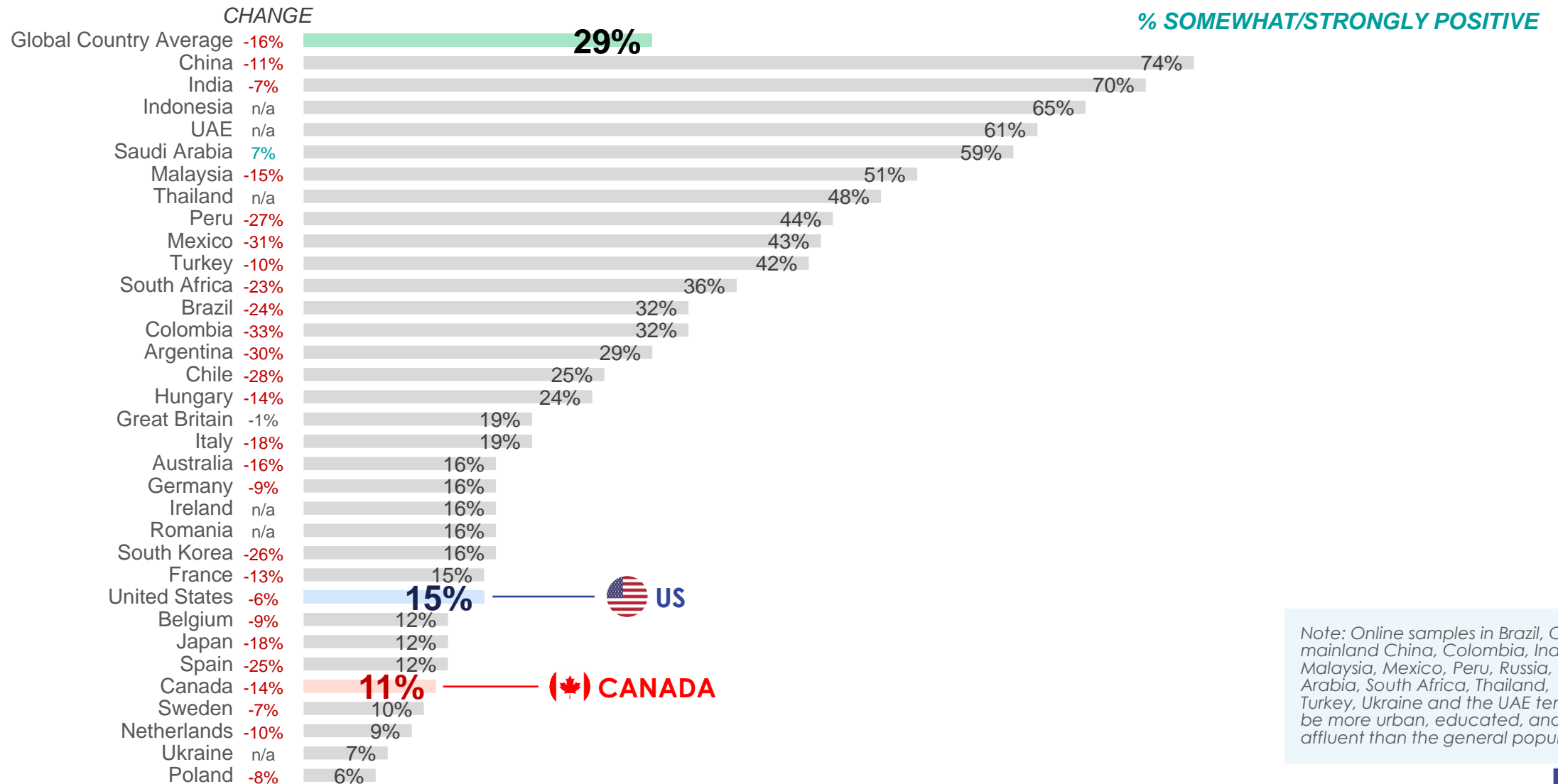
Q: Thinking about the next decade, would you say the following countries or organizations will have an overall positive or a negative influence on world affairs?

% STRONGLY/SOMEWHAT POSITIVE

									YEAR-ON-YEAR CHANGE FROM						
	Oct 2022	Oct 2021	Sept 2020	Sept 2019	Nov 2018	Oct 2017	Oct 2016	Oct 2015	2021	2020	2019	2018	2017	2016	2015
 Canada	81%	80%	81%	81%	77%	82%	81%	81%	1%	-1%	n/c	4%	-4%	-1%	n/c
 Germany	75%	77%	78%	75%	71%	76%	81%	75%	-2%	-1%	3%	4%	-5%	-5%	6%
 France	73%	72%	70%	71%	67%	75%	71%	72%	1%	2%	-1%	4%	-8%	4%	-1%
 European Union	71%	72%	70%	70%	66%	71%	n/a	n/a	-1%	2%	n/c	4%	-5%	n/a	n/a
 United Nations	71%	70%	69%	71%	67%	72%	73%	74%	1%	1%	-2%	4%	-5%	-1%	-1%
 My country	72%	70%	69%	68%	68%	70%	68%	70%	2%	1%	1%	n/c	-2%	2%	-2%
 Great Britain	69%	64%	66%	62%	63%	69%	67%	72%	5%	-2%	4%	-1%	-6%	2%	-5%
 United States	64%	62%	50%	52%	50%	55%	64%	65%	2%	12%	-2%	2%	-5%	-9%	-1%
 The World Bank	63%	62%	61%	61%	57%	61%	58%	59%	1%	1%	n/c	4%	-4%	3%	-1%
 The International Monetary Fund (or IMF)	61%	60%	59%	58%	56%	59%	56%	57%	1%	1%	1%	2%	-3%	3%	-1%
 NATO	65%	60%	60%	60%	57%	n/a	n/a	n/a	5%	n/c	n/c	3%	n/a	n/a	n/a
 India	50%	48%	50%	52%	51%	59%	55%	56%	2%	-2%	-2%	1%	-8%	4%	-1%
 Russia	29%	45%	46%	45%	43%	50%	46%	42%	-16%	-1%	1%	2%	-7%	4%	4%
 China	42%	43%	42%	53%	53%	58%	55%	53%	-1%	1%	-11%	n/c	-5%	3%	2%
 Israel	43%	40%	39%	36%	35%	43%	37%	33%	3%	1%	3%	1%	-8%	6%	4%
 Saudi Arabia	45%	40%	42%	39%	34%	n/a	n/a	n/a	5%	-2%	3%	5%	n/a	n/a	n/a
 Iran	28%	24%	27%	25%	25%	31%	26%	25%	4%	-3%	2%	n/c	-6%	5%	1%

WORLD INFLUENCERS: RUSSIA

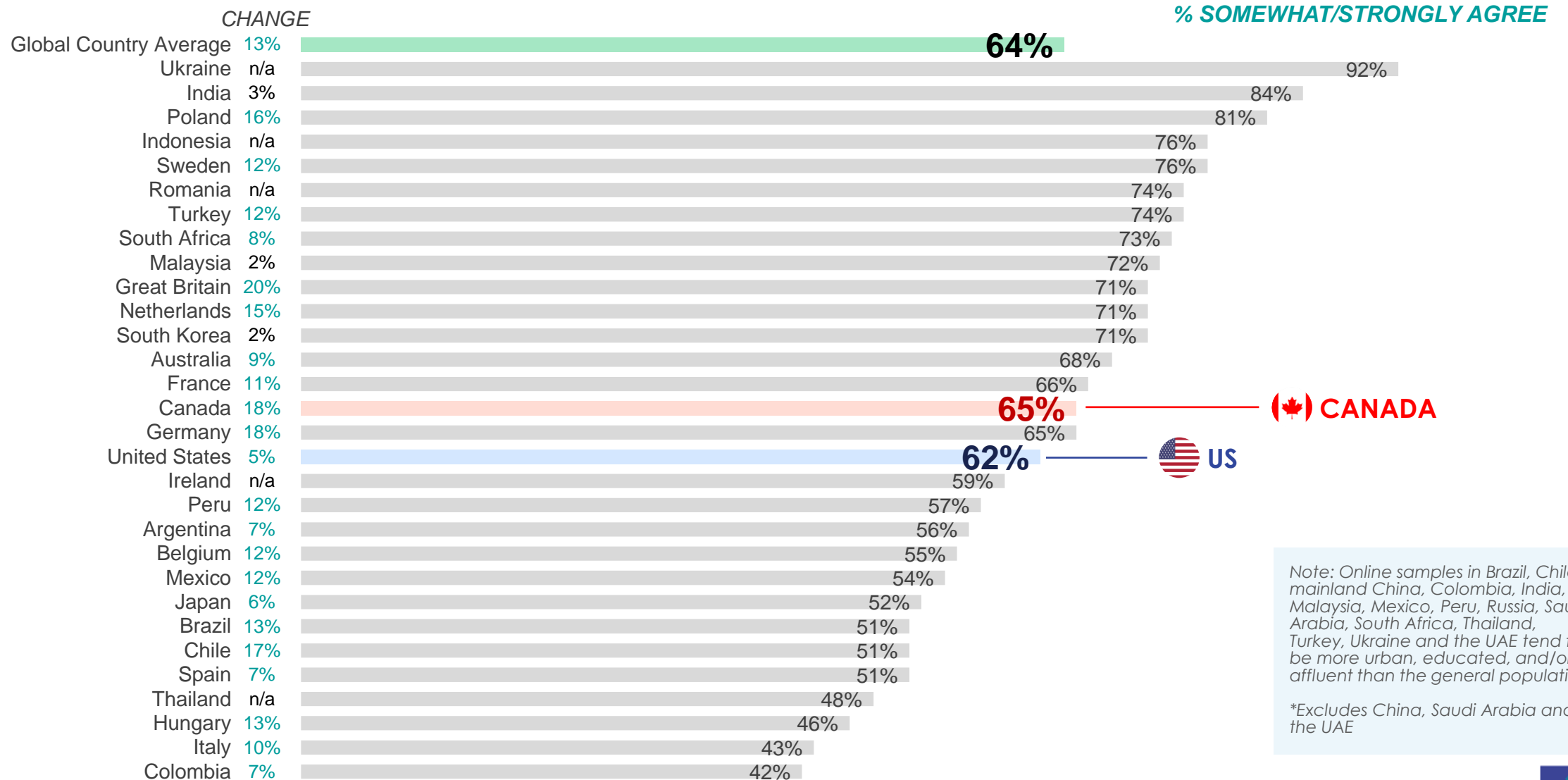
Q: Thinking about the next decade, would you say **Russia** will have an overall positive or a negative influence on world affairs?



Note: Online samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, Thailand, Turkey, Ukraine and the UAE tend to be more urban, educated, and/or affluent than the general population.

MILITARY SPENDING

Q: Given the dangers in the world, my government needs to spend more on my country's military power



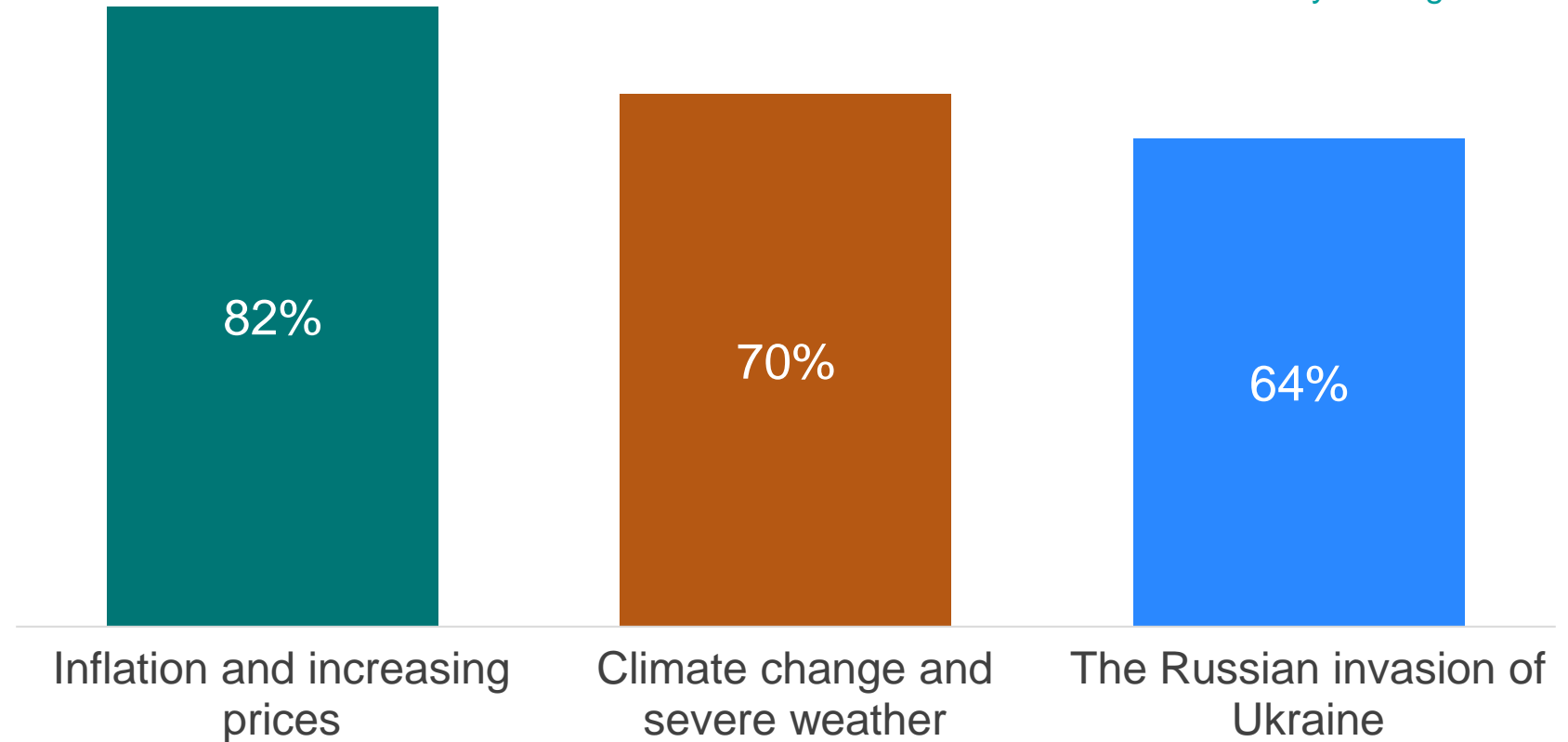
ATTENTION PAID TO THE INVASION OF UKRAINE GLOBALLY

Q. How closely, if at all, have you been following stories about the Russian invasion of Ukraine?

% FOLLOWING IT VERY OR SOMEWHAT CLOSELY

28-Country Average

- On average across 28 countries, 64% of the public surveyed follows the Russian invasion of Ukraine closely
- Only 18 points lower than inflation – the world's #1 concern – and 6 points lower than climate change and severe weather



Base: 19,003 online adults under the age of 75 across 28 countries

The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result. The samples in Brazil, Chile, Colombia, India, Indonesia, Malaysia, Mexico, Peru, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

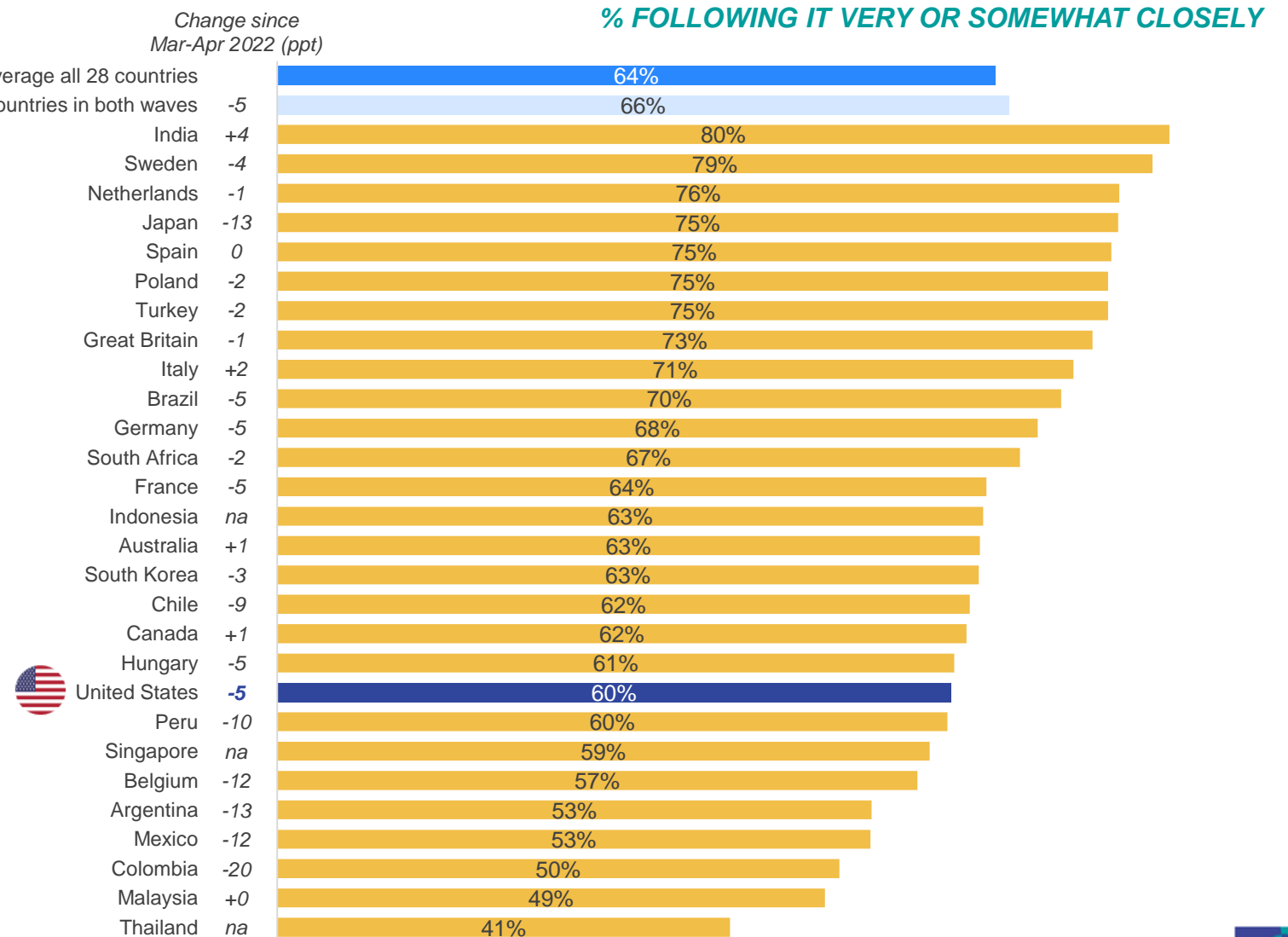
ATTENTION PAID TO THE INVASION OF UKRAINE BY COUNTRY

Q. How closely, if at all, have you been following stories about the Russian invasion of Ukraine?

- Attention paid to the Russian invasion of Ukraine is highest in India and Japan, as well as Sweden, the Netherlands, Poland, and Spain
- It is lowest in Thailand and Malaysia
- On average across all 25 countries already surveyed in late March-early April, it has dropped by 5 percentage points

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COUNTRIES WITH STRONGEST OPINIONS ON THE WAR IN UKRAINE

Q. To what extent do you agree or disagree with the following statements:

% AGREE

[My country] should avoid getting involved militarily in this conflict

[My country] must support sovereign countries when they are attacked by other countries

* Restrictions on Russian oil and gas imports are important to maintain, even if it means we must limit our heating this winter...

[My country] should take in Ukrainian refugees from the current conflict

Russia must continue to be excluded from major international sports competitions

Given the current economic crisis, [my country] cannot afford to lend financial support to Ukraine

Doing nothing in Ukraine will encourage Russia to take further military action elsewhere in Europe and Asia

Paying more for fuel and gas because of sanctions against Russia is worthwhile to defend another sovereign country

The problems of Ukraine are none of our business, and we should not interfere

28-Country Average

71%

70%

67%

66%

66%

64%

63%

53%

42%

Highest in:

Hungary (85%),
Malaysia (85%)

Indonesia (84%),
India (81%), Great
Britain (81%)

Great Britain (78%),
Netherlands (76%)

Great Britain (81%),
Netherlands (80%)

Great Britain (85%),
Poland (85%)

Malaysia (81%),
South Africa (79%)

Great Britain (79%),
Australia (76%)

South Korea (72%),
India (71%)

India (62%),
Hungary (60%),
Thailand (60%)

Lowest in:

Canada (56%),
Sweden (57%)

Brazil (56%),
Hungary (59%),
Chile (59%)

Hungary (37%),
Germany (60%)

Indonesia (44%),
Singapore (47%)

Indonesia (39%),
Mexico (44%)

Netherlands (41%),
Sweden (43%)

Hungary (43%),
Argentina (49%)

Chile (34%),
Colombia (35%)

Netherlands (25%),
Sweden (25%)



USA:

68%

69%

64%

66%

73%

59%

68%

54%

40%

* Statement asked only in the 9 European Unions countries surveyed, Australia, Canada, Great Britain, and the United States

Base: 19,003 online adults under the age of 75 across 28 countries
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CHANGE IN OPINIONS ON THE WAR IN UKRAINE BY COUNTRY

Q. To what extent do you agree or disagree with the following statements:

CHANGE IN % AGREE BETWEEN MAR-APR 2022 AND NOV-DEC 2022 (IN PERCENTAGE POINTS)

	Average 25 countries in both waves	Argentina	Australia	Belgium	Brazil	Canada	Chile	Colombia	France	Germany	Great Britain	Hungary	India	Italy	Japan	Malaysia	Mexico	Netherlands	Peru	Poland	South Africa	South Korea	Spain	Sweden	Turkey	United States
[My country] should avoid getting involved militarily in this conflict	-1	-3	+4	0	+2	0	+6	-7	-7	-2	-1	-5	0	-4	-3	+4	-3	-4	0	0	-1	0	-1	-1	-5	+3
[My country] must support sovereign countries when they are attacked by other countries	-1	-1	+1	+3	+3	-1	-9	+2	-4	-6	0	+6	0	-3	-4	+2	+9	-3	+1	-5	-2	0	-1	-7	+2	-4
[My country] should take in Ukrainian refugees from the current conflict	-7	-8	-5	-14	-6	-3	-11	-3	-10	-14	-3	-10	-2	-7	-9	-10	-6	-6	-6	-11	-6	0	-7	-9	-3	-6
Given the current economic crisis, [my country] cannot afford to lend financial support to Ukraine	+2	+3	+2	+7	-3	+2	+3	-2	+8	+9	+3	-1	-1	+4	+10	0	0	+5	-5	+7	-2	0	+1	+11	-2	+4
Doing nothing in Ukraine will encourage Russia to take further military action elsewhere in Europe and Asia	-5	-12	0	-1	-3	-1	-5	-12	-1	-11	+1	-4	+3	-3	-9	-3	-8	-7	-7	-6	-9	0	-4	+1	+1	-9
Paying more for fuel and gas because of sanctions against Russia is worthwhile to defend another sovereign country	-2	-1	-1	-1	+1	+7	-9	-9	-2	-2	0	0	-2	-1	-9	-5	+1	-4	-1	-11	-3	0	+4	+4	+4	-1
The problems of Ukraine are none of our business, and we should not interfere	+3	+1	+4	+4	+3	+6	+7	-5	+4	+11	+1	-6	+5	+1	+7	-5	+5	+5	+6	+1	-3	0	+6	+5	+13	+6

Base: 19,003 online adults under the age of 75 across 28 countries

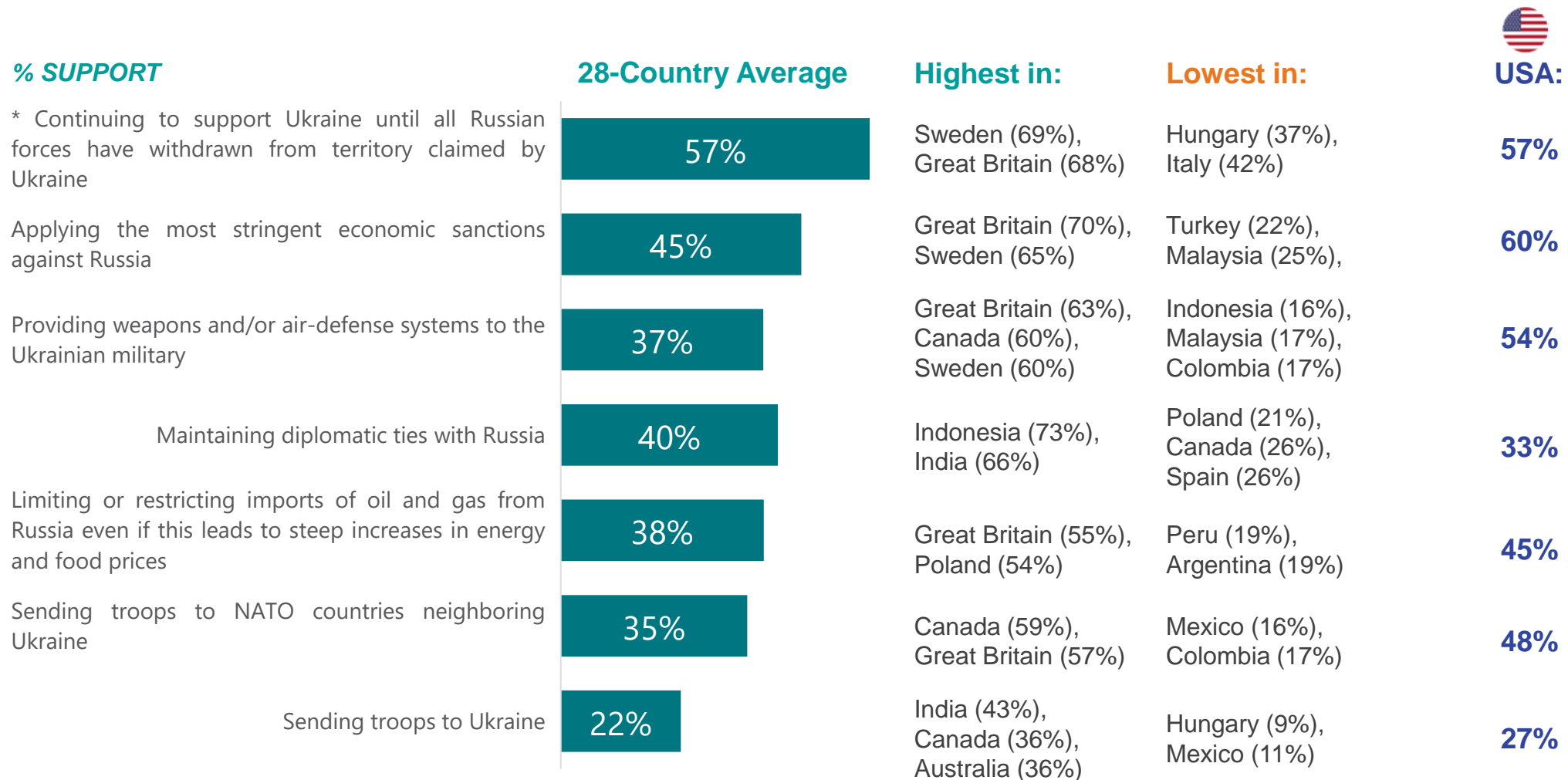
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The samples in Brazil, Chile, Colombia, India, Indonesia, Malaysia, Mexico, Peru, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.



COUNTRIES WITH STRONGEST OPINIONS ON THEIR OWN RESPONSE

Q. Would you support or oppose [your country] doing the following in response to the current situation in Ukraine?



* Statement asked only in the 9 European Union countries surveyed, Australia, Canada, Great Britain, and the United States

Base: 19,003 online adults under the age of 75 across 28 countries

The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

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SUMMARY

- Fear of armed conflict between nations a mid-tier issue; COVID as threat has been replaced by cost of living
- War in Ukraine has increased fear in the world, especially in countries closer to the conflict; global public is watching
- Contributing factor in some countries is likely Taiwan
- Increased fear of NBC attack
- Ongoing resolve to support Ukraine but more challenging when it comes to personal sacrifices (cost of energy) and refugees
- Little global support for sending in troops to support Ukraine
- Russia's global reputation has taken considerable hit due to invasion; NATO's reputation has improved

U.S. PUBLIC OPINION AND THE WAR

How far are Americans willing to go

Clifford Young, President, U.S. Public Affairs, Ipsos

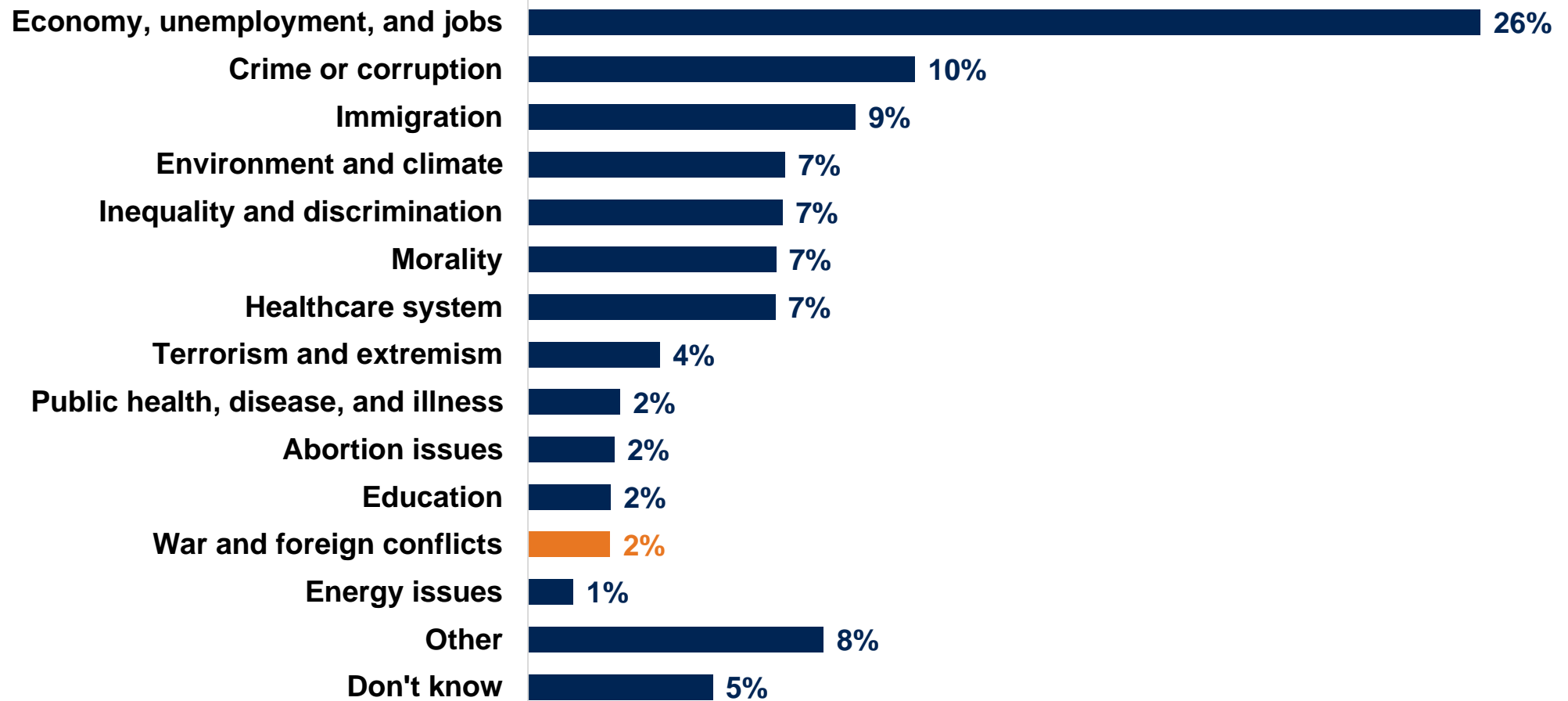
GAME CHANGERS



FOREIGN POLICY-PUBLIC OPINION LINK

	Percent Convergence
Electoral Convergence	80-85%
Domestic Policy Convergence	70%+
Foreign Policy Convergence	50%

AMERICANS WORRIED ABOUT BREAD AND BUTTER ISSUES



Source: Ipsos Core Political January 13-15, 2022 among 1035 U.S. adults

FOREIGN WARS DON'T TOUCH AMERICANS

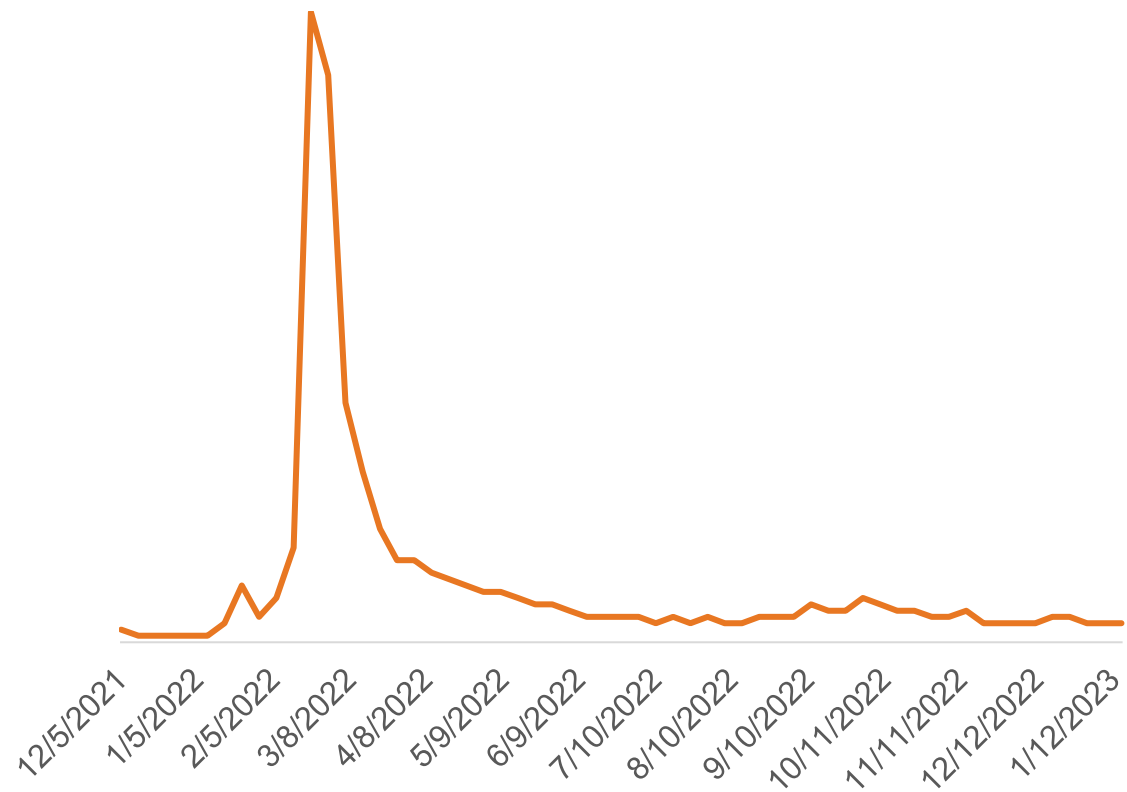
Percent of Americans who are concerned about war and foreign conflict



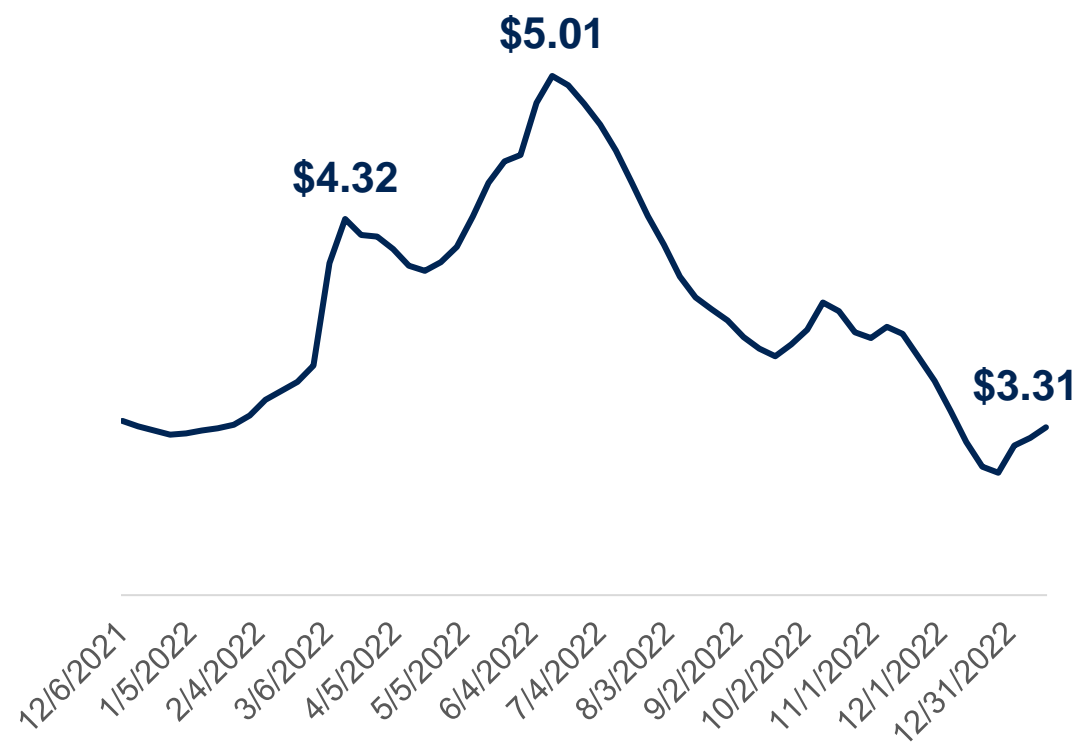
Source: Ipsos Core Political, latest field date January 13-15, 2022 among 1035 U.S. adults

AMERICANS' PROXIMITY TO UKRAINE

Google search trend for “Ukraine”



Weekly U.S. Regular All Formulations Retail Gasoline Prices



Source: Left: Google Trends
Right: U.S. Energy Information Administration



CONDITIONALITY OF AMERICAN SUPPORT FOR UKRAINE

Increasing economic and diplomatic sanctions on Russia

75%

Accepting Ukrainian refugees into the United States

73%

Providing economic assistance to Ukraine

66%

Sending additional arms and military supplies to the Ukrainian government

65%

Using air strikes to support the Ukrainian army

37%

Sending U.S. troops to help the Ukrainian government defend itself against Russia

34%

Source: The Chicago Council on Global Affairs November 18-20, 2022, n=1,030

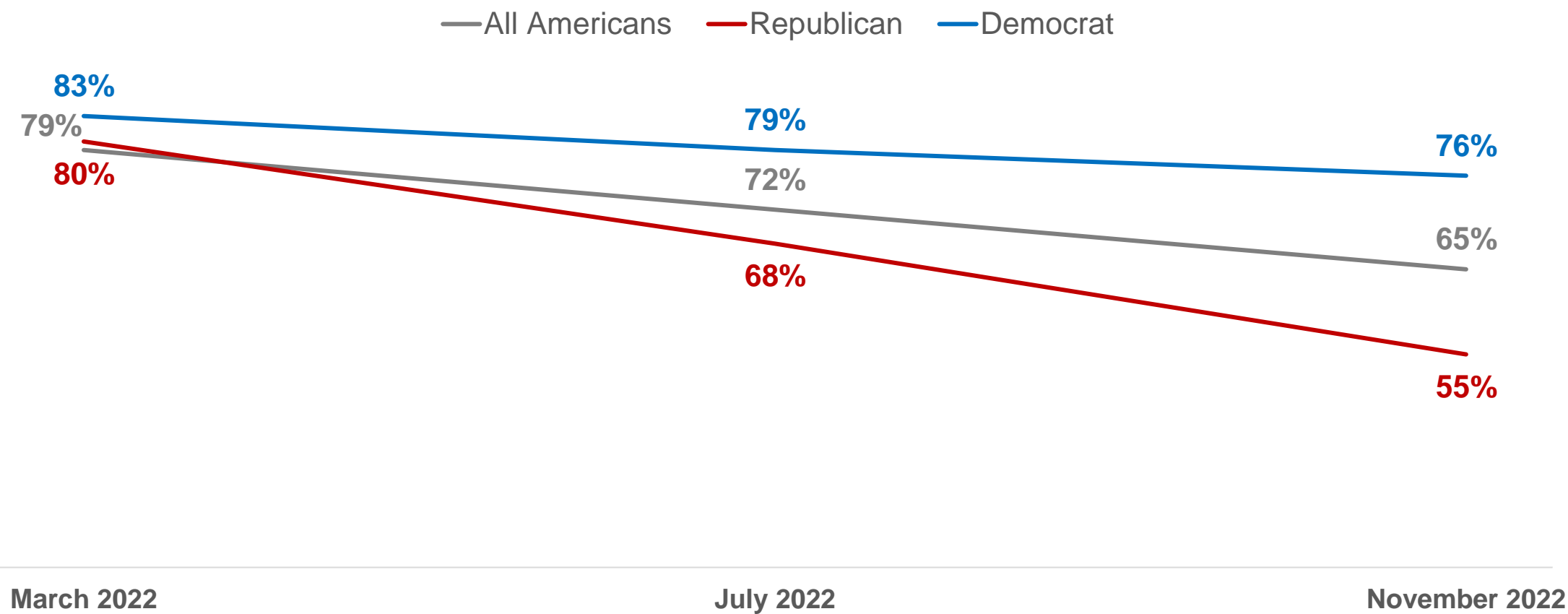
*Air strike item from Reuters/Ipsos survey of 1,005 U.S. adults conducted between Apr 25-26, 2022

MOST AGREE U.S. SHOULD CONTINUE TO SUPPORT UKRAINE DESPITE NUCLEAR THREAT



Source: Reuters/Ipsos poll conducted October 4-5. Base: All respondents (N=1,005)

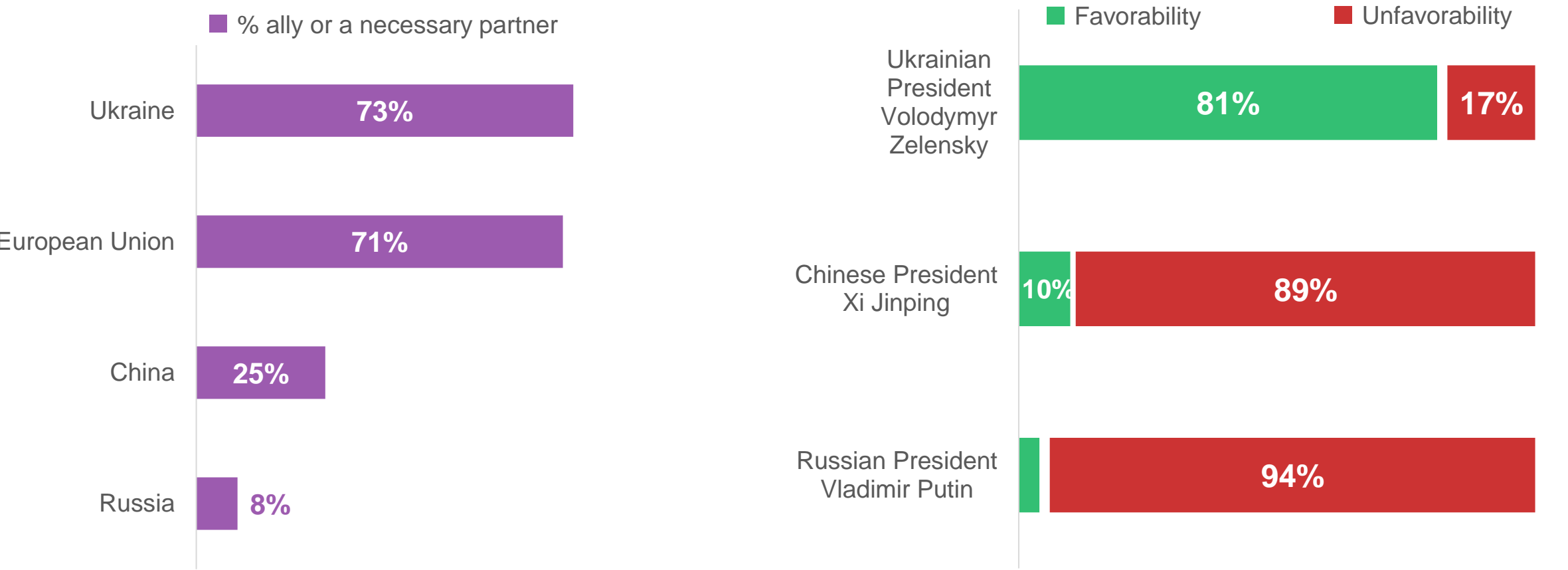
SUPPORT ATTENUATES WITH TIME



Source: The Chicago Council on Global Affairs
* Full statement wording: In response to the situation involving Russia and Ukraine would you support or oppose the United States: Sending additional arms and military supplies to the Ukrainian government



CREDIBILITY MESSENGERS AND THE UKRAINE CONFLICT



Source: The Chicago Council on Global Affairs
Q (right): Do you have a very favorable, somewhat favorable, somewhat unfavorable, or very unfavorable view of the following world leaders? – March 2022
Q (left): Generally speaking, which of following descriptions do you feel best reflects the relationship between the United States and the countries listed below? – March 2022


UKRAINIANS' OPINION ABOUT U.S. AND GLOBAL SUPPORT

Findings from Ipsos' Ukraine Resilience Monitor

Irina Baleva, Country Manager for Ukraine, Ipsos

GAME CHANGERS





60% agree Ukraine receives strong diplomatic support

83% feel touched by the personal visits of world leaders

Q15. According to your opinion, how sufficient or insufficient is the support of Ukraine by the partner countries – diplomatic support? Sufficient or rather sufficient

Q18. Since the beginning of the full-scale Russian war, Ukraine has been visited by dozens of world leaders. To what extent do you agree or disagree with the fact that ... I was touched by the personal visit of world leaders, completely or rather agree

Sample size: 800 respondents, random digital dialing, telephone interview, nationally representative sample

**95% agree visits of
world leaders were of
great importance to familiarize
the world with the situation in Ukraine**

Q18. Since the beginning of the full-scale Russian war, Ukraine has been visited by dozens of world leaders. To what extent do you agree or disagree with the fact that ... These visits were of great importance for familiarizing the world with the situation in Ukraine, completely or rather agree
Sample size: 800 respondents, random digital dialing, telephone interview, nationally representative sample

A background image showing a group of Ukrainian soldiers in a city street. The soldiers are wearing helmets, tactical vests, and carrying rifles. They are looking in various directions, some towards the camera. The image has a blue tint and is used as a background for the text.

95% agree visits of world leaders were

A manifestation of solidarity with the Ukrainian people

Q18. Since the beginning of the full-scale Russian war, Ukraine has been visited by dozens of world leaders. To what extent do you agree or disagree with the fact that ...

It was a manifestation of solidarity with the Ukrainian people, completely or rather agree

Sample size: 800 respondents, random digital dialing, telephone interview, nationally representative sample



94% agree

World leaders showed bravery by coming to Ukraine during the war

Q18. Since the beginning of the full-scale Russian war, Ukraine has been visited by dozens of world leaders. To what extent do you agree or disagree that, World leaders showed bravery by coming to Ukraine during the war completely or rather agree

Sample size: 800 respondents, random digital dialing, telephone interview, nationally representative sample

IMPORTANCE OF VISITING RECENTLY LIBERATED TOWNS IN THE EAST & SOUTH

83% find it

meaningful when international leaders visit both East & South

Q17.To what extent do you consider it is meaningful or not if the international leaders visit the crime scenes of the Russian army in the recently liberated territories of Eastern and Southern Ukraine? Meaningful or rather meaningful

Sample size: 800 respondents, random digital dialing, telephone interview, nationally representative sample



FINDINGS FROM LIBERATED TOWNS IN THE EAST

BALAKLIYA IZIUM KUPYANSK

2 weeks after liberation

1 in 4 had a job

62% internet access

91% active mobile signal

Sample size of 237 respondents who were residing in Balakliya, Iziium, Kupyansk (data collection October 2022, 2 weeks after liberation)

PERCEPTION OF REFUGEE SUPPORT

73% of surveyed
believe there is a sufficient
level of support for Ukraine
in **receiving Ukrainian
refugees**

22%

reported they or a member of their family **had
to flee Ukraine since
February 24th, 2022**

12%

reported they or a member of their family
**have not yet returned to
Ukraine**

Refugees: First, it will be about YOU AND YOUR FAMILY - husband/wife, children, grandchildren. Tell me, please, since February 24, has any of the above happened to you personally? Currently (a) "You left your home, went abroad and have not returned yet", Total (b) "You left your home, went abroad and have already returned" + "You left your home, went abroad and have not returned yet"

Receiving Ukrainian Refugees: According to your opinion, how sufficient or insufficient is the support of Ukraine by the partner countries? Scale: completely sufficient, rather sufficient, rather insufficient, completely insufficient, don't know, *Sufficient = top 2 box [completely + rather sufficient]

Sample size: 800 respondents, random digital dialing, telephone interview, nationally representative sample

ECONOMIC RESILIENCE

49%

think there is sufficient* level of
**economic aid to
Ukraine by the
partner countries**

54% Ukrainians
report personal
income drop

average drop **by -
43%**

Cost of living has
raised by +42%

56% have job now

▼ 20%

70%
Employed
before
Feb 24,
2022

19%
reported they or a member of their family
**have not yet returned to back
home from other regions of
Ukraine**

Personal Income Drop: Please, indicate how has your income changed compared to your income situation before 24 February 2022 (please evaluate including all sources of income: salary, pension, benefits, allowances, business, etc.)?

Cost of Living Inflation Q: Taking into account your household expenditures back in January 2022, please, estimate the percentage your household expenditures have increased now (January 2023)?

IDPs: First, it will be about YOU AND YOUR FAMILY - husband/wife, children, grandchildren. Tell me, please, since February 24, has any of the above happened to you personally? Currently (a) “You left your home, went to another place in Ukraine and have not returned yet”, Total (b) “You left your home, went to another place in Ukraine, but have already returned” + “You left your home, went to another place in Ukraine and have not returned yet”

Economic aid to Ukraine: According to your opinion, how sufficient or insufficient is the support of Ukraine by the partner countries? Scale: completely sufficient, rather sufficient, rather insufficient, completely insufficient, don't know. *Sufficient = top 2 box [completely + rather sufficient]

Sample size: 800 respondents, random digital dialing, telephone interview, nationally representative sample

WEAPON SUPPORT

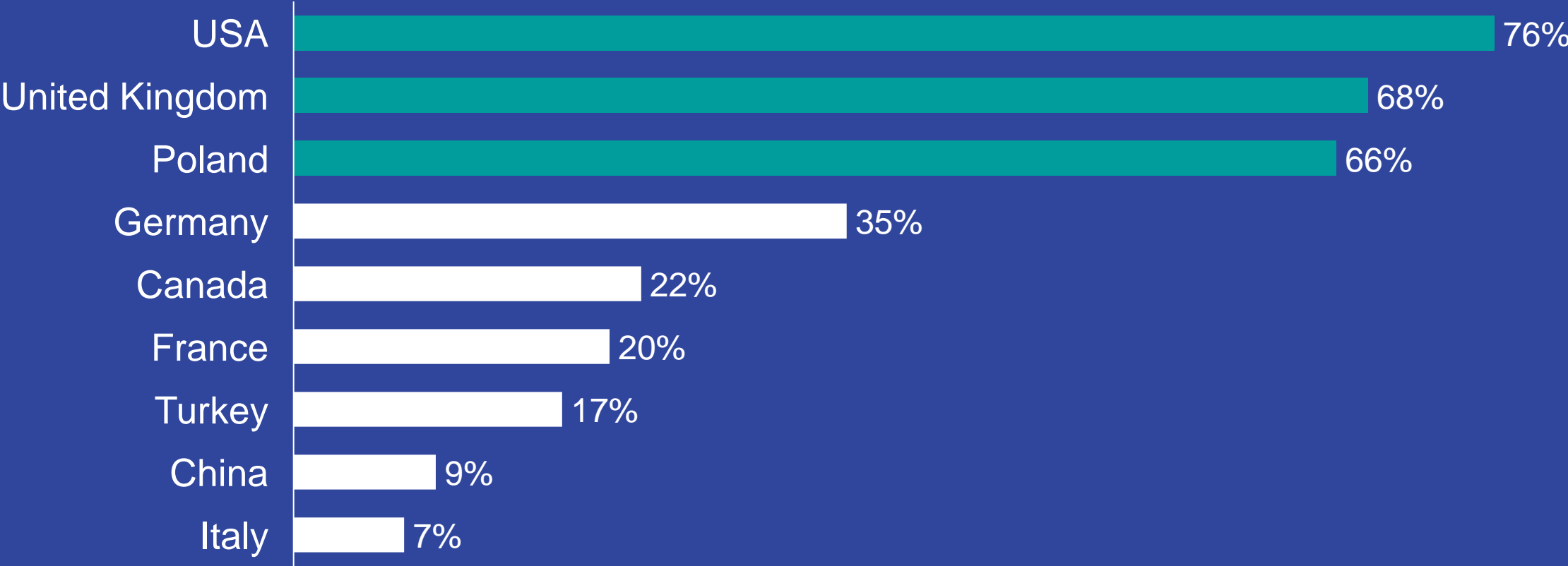
18%

think there is sufficient* level of **provision of arms to
Ukraine by the partner countries**

Provision of Arms to Ukraine: According to your opinion, how sufficient or insufficient is the support of Ukraine by the partner countries? Scale: completely sufficient, rather sufficient, rather insufficient, completely insufficient, don't know. *Sufficient = top 2 box [completely + rather sufficient]

Sample size: 800 respondents, random digital dialing, telephone interview, nationally representative sample

USA IS CONSIDERED TO BE **THE MOST RELIABLE**
GUARANTORS OF UKRAINE’S SECURITY, FOLLOWED BY **UK AND POLAND**



In your opinion, which countries can become the most reliable guarantors of Ukraine's security? Please name no more than five
Sample size: 800 respondents, random digital dialing, telephone interview, nationally representative sample

REMOTE SENSING INSIGHTS OF UKRAINIAN CRISIS

Mark Polyak
President of Analytics for North America, Ipsos

GAME CHANGERS

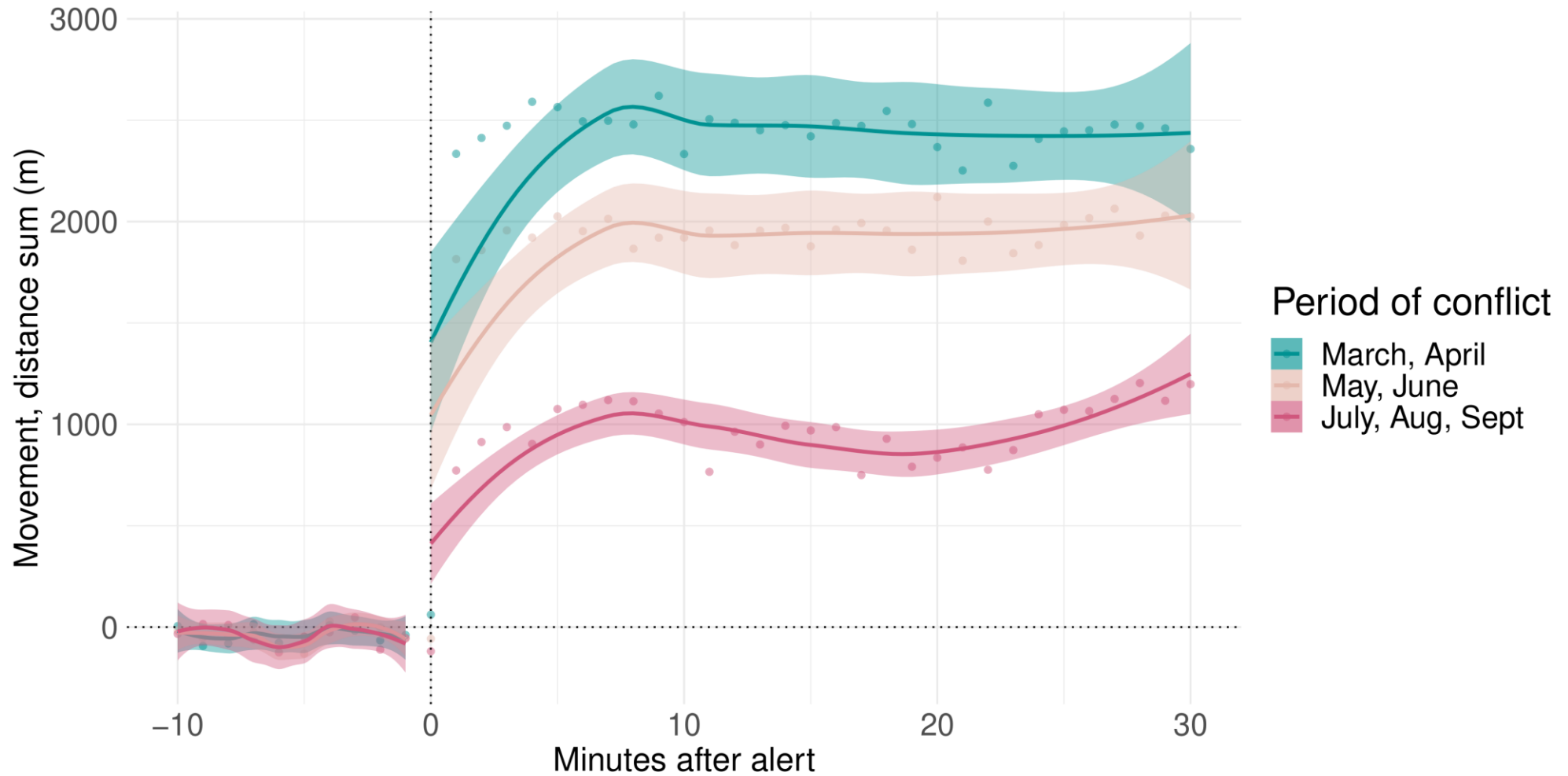




IPSOS RESEARCH IN UKRAINE

- **Public opinion** in Ukraine
- Ukrainian preferences and trust **on future** of reconstruction process
- **Measuring resilience** of the Ukrainian people and institutions
- Access to basic services, including in **newly liberated** cities
- Impact of **targeting energy infrastructure** on Ukrainian economy
- Research on **refugee and internally displaced people** (IDP) needs and trends
- Needs assessments of **educational, health and medical support facilities**
- Damage assessments of **multi-sectoral infrastructure**

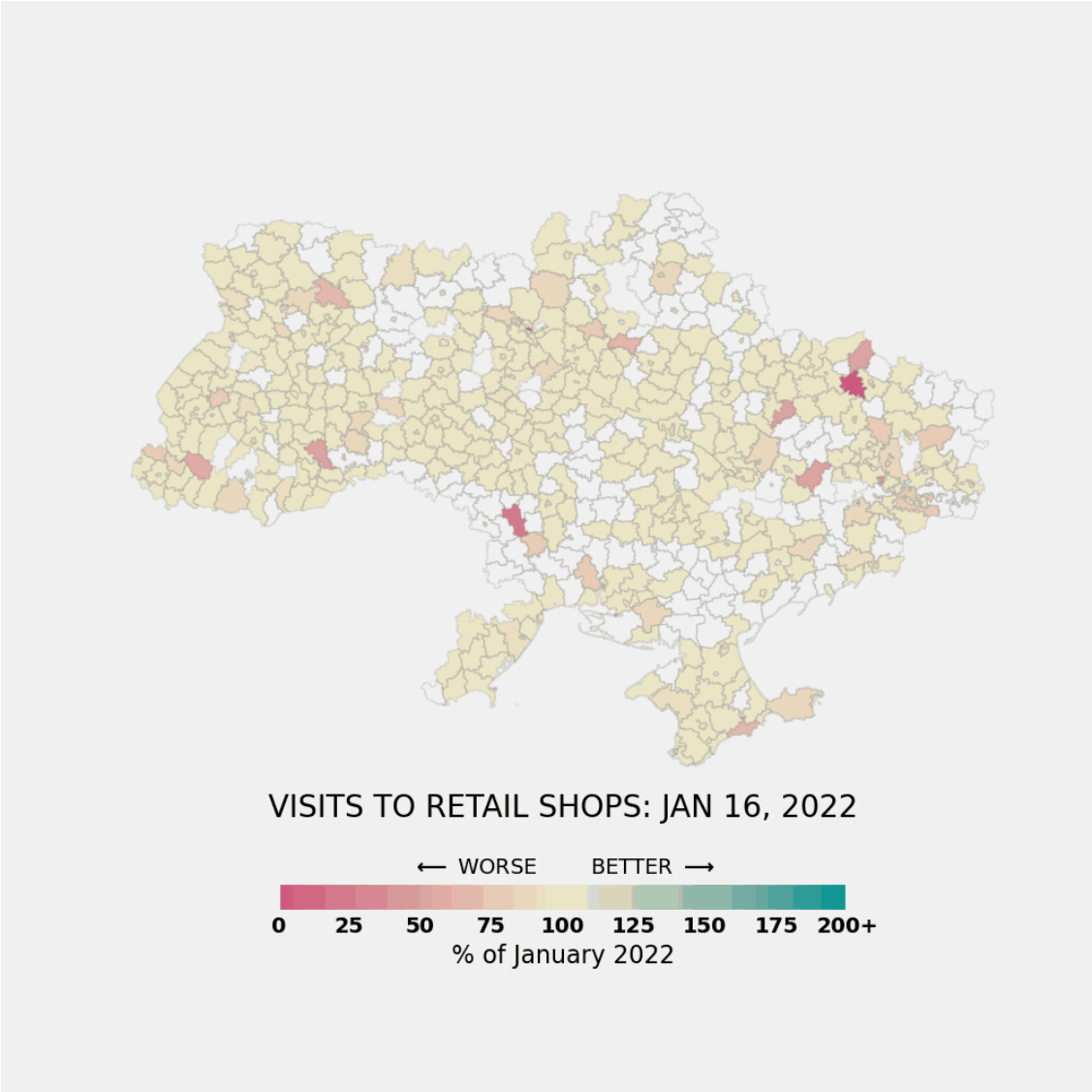
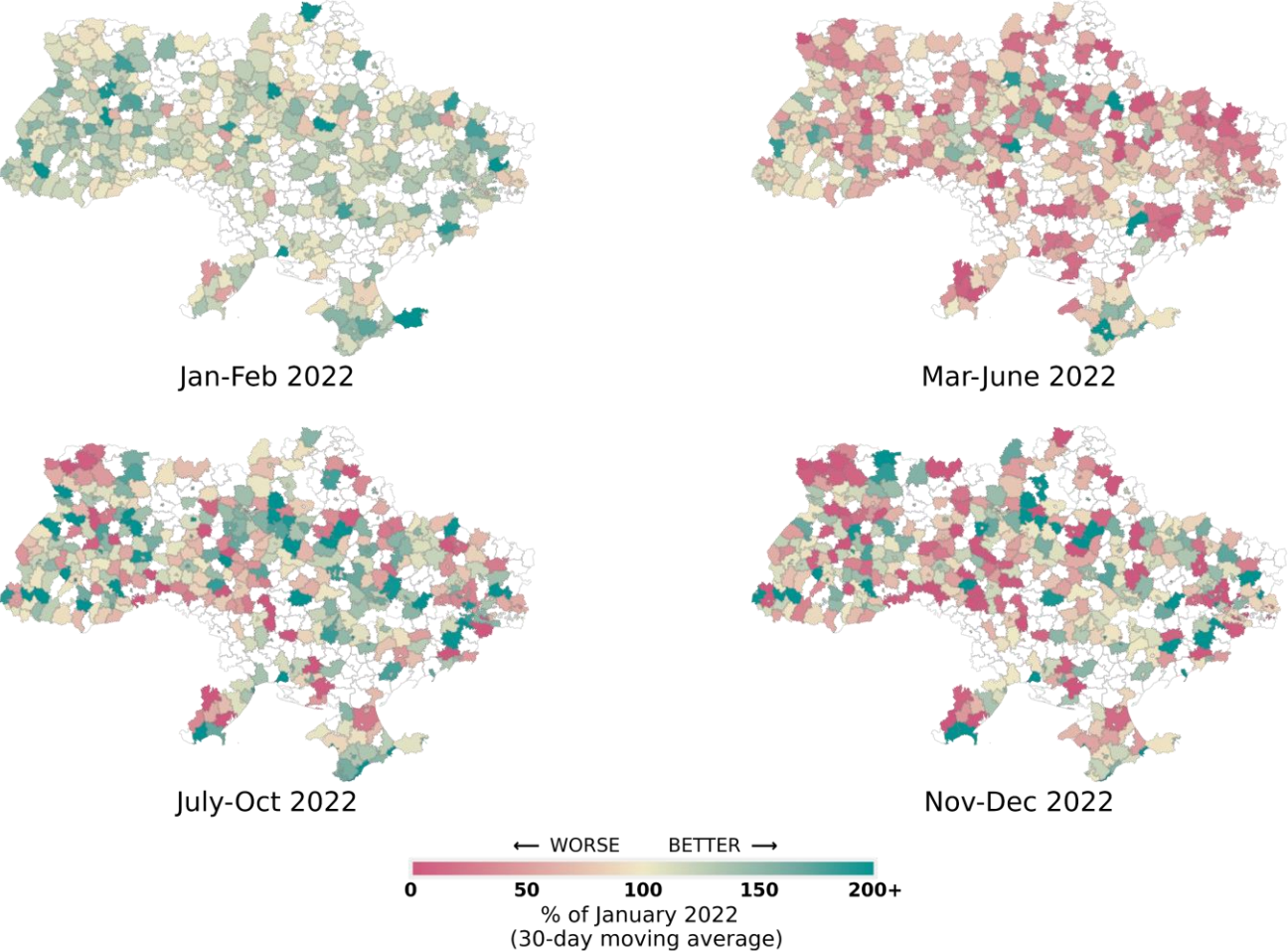
- **35-45% of lives saved thanks to first of its kind hybrid air alert system**
- **8-15% more lives could be saved by addressing declining alert response**



- Sample Size: 17M anonymized devices responding to +3K alerts in 42 alert zones
- Source: Van Dijcke, David, Mark Polyak, and Austin L. Wright. "Civil Response to Government Alerts Declines During Russian Invasion of Ukraine." (2022).

NATIONWIDE TRENDS

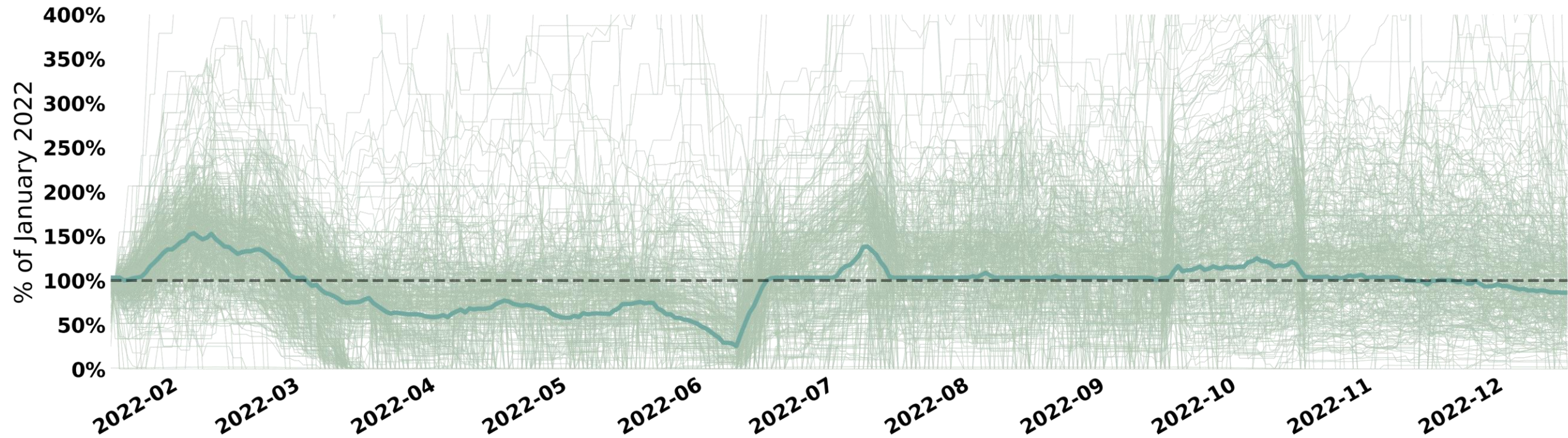
RETAIL TRAFFIC



Sample Size: 8,812,268 retail store across Ukraine

NATIONWIDE TRENDS

RETAIL TRAFFIC



Thin lines: districts (raions), **thick line:** (unweighted) average across districts (raions)

• Sample Size: visits of 60 million anonymized devices at 8,812,268 retail store across Ukraine

February 24:
Russia invades
Kherson Oblast

June 26:
Russia
distributes
cash
payments in
rubles

September 30:
Russian
Federation
annexes
Kherson

November 11:
Kherson is
liberated by
Ukrainian forces

March 2:
Kherson falls
to Russia

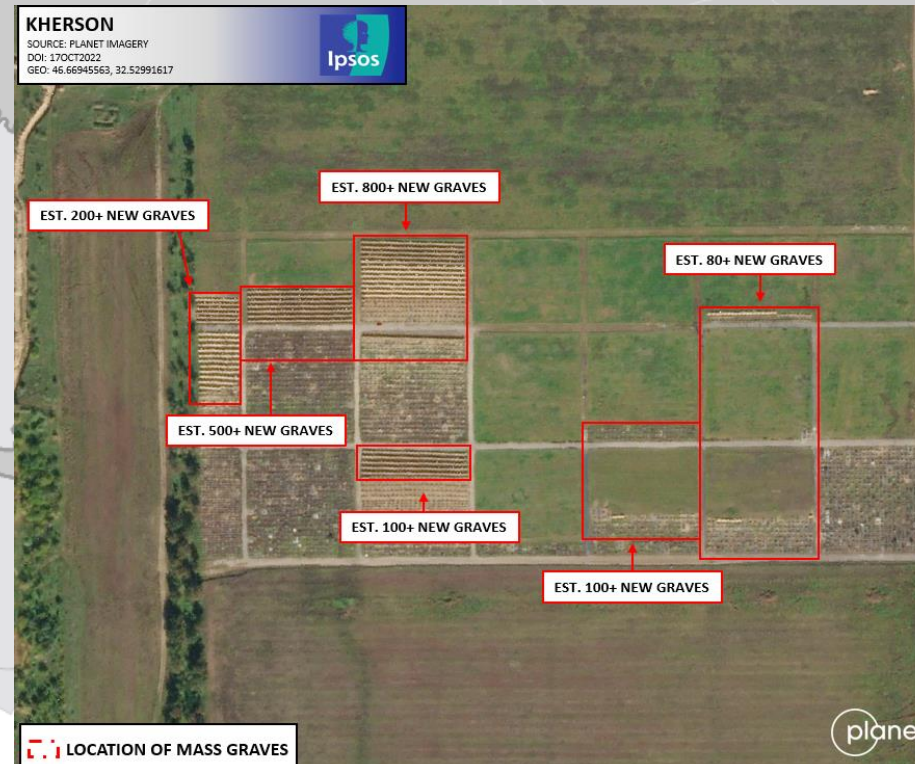
July 27:
Russians
begins
repairing
infrastructure
in Kherson

October 30:
Russia urges
Ukrainians to
evacuate
Kherson

December 28:
Russia
intensifies
attacks on
Kherson

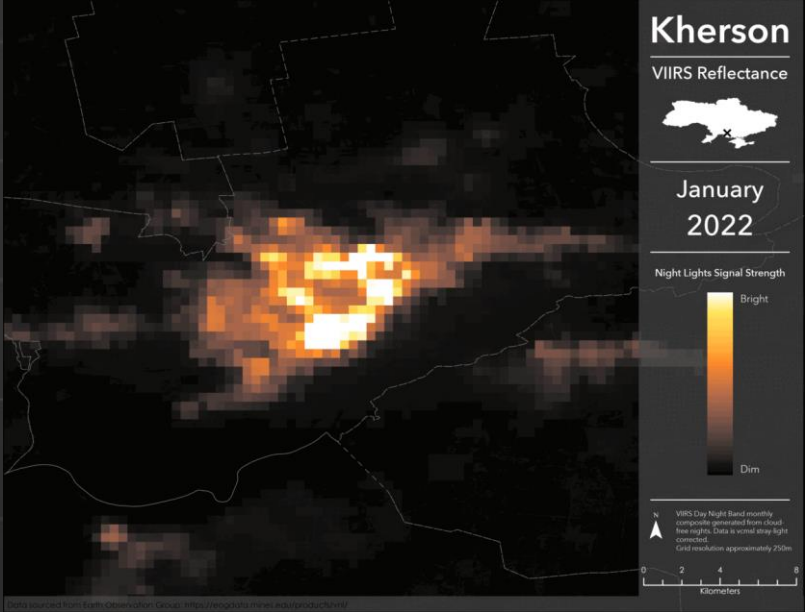
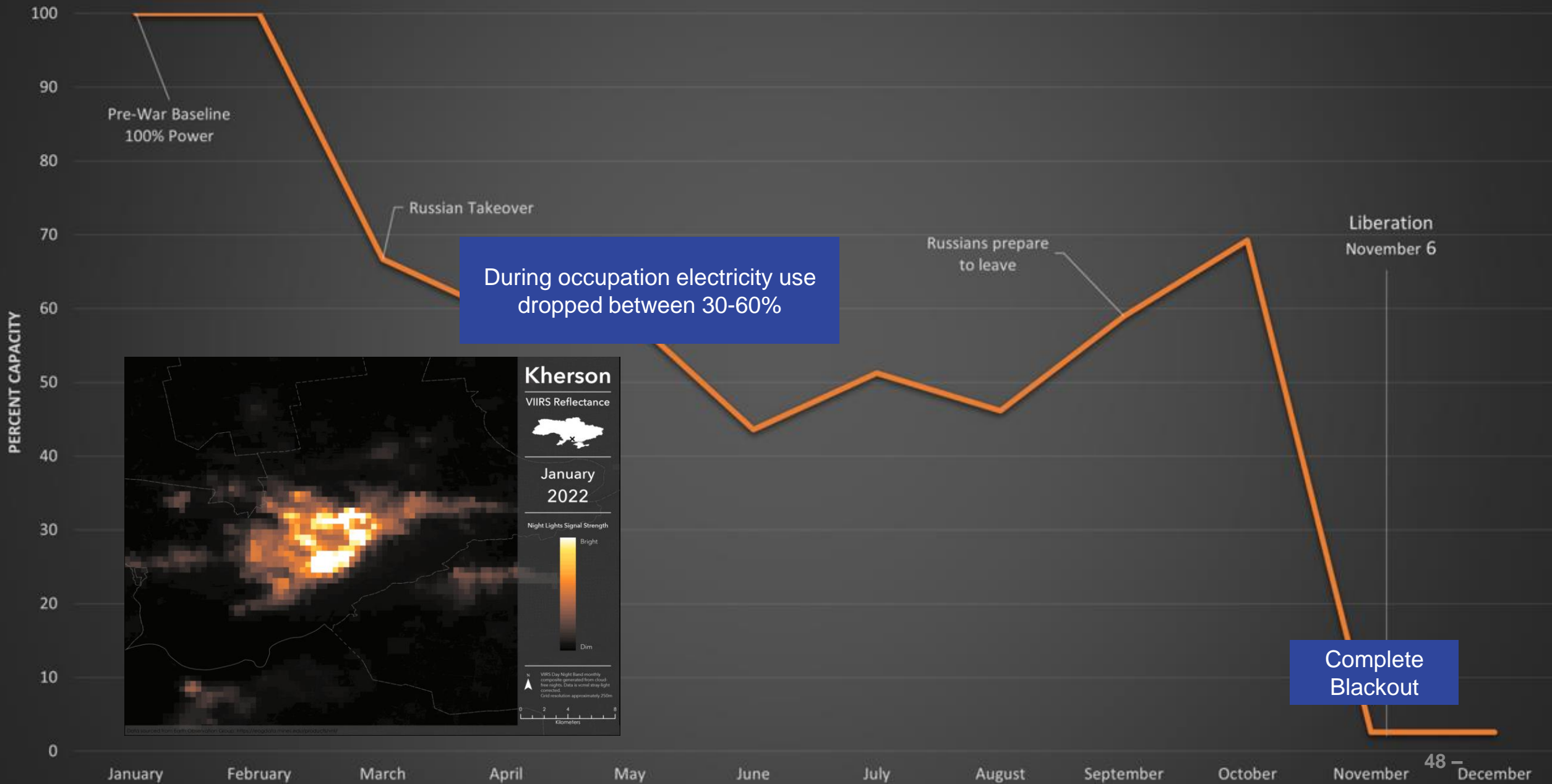
OCCUPATION OF KHERSON

© Ipsos | The War in Ukraine: Where the Public



Estimated Access to Power

Kherson, January - December 2022



LIFE UNDER OCCUPATION

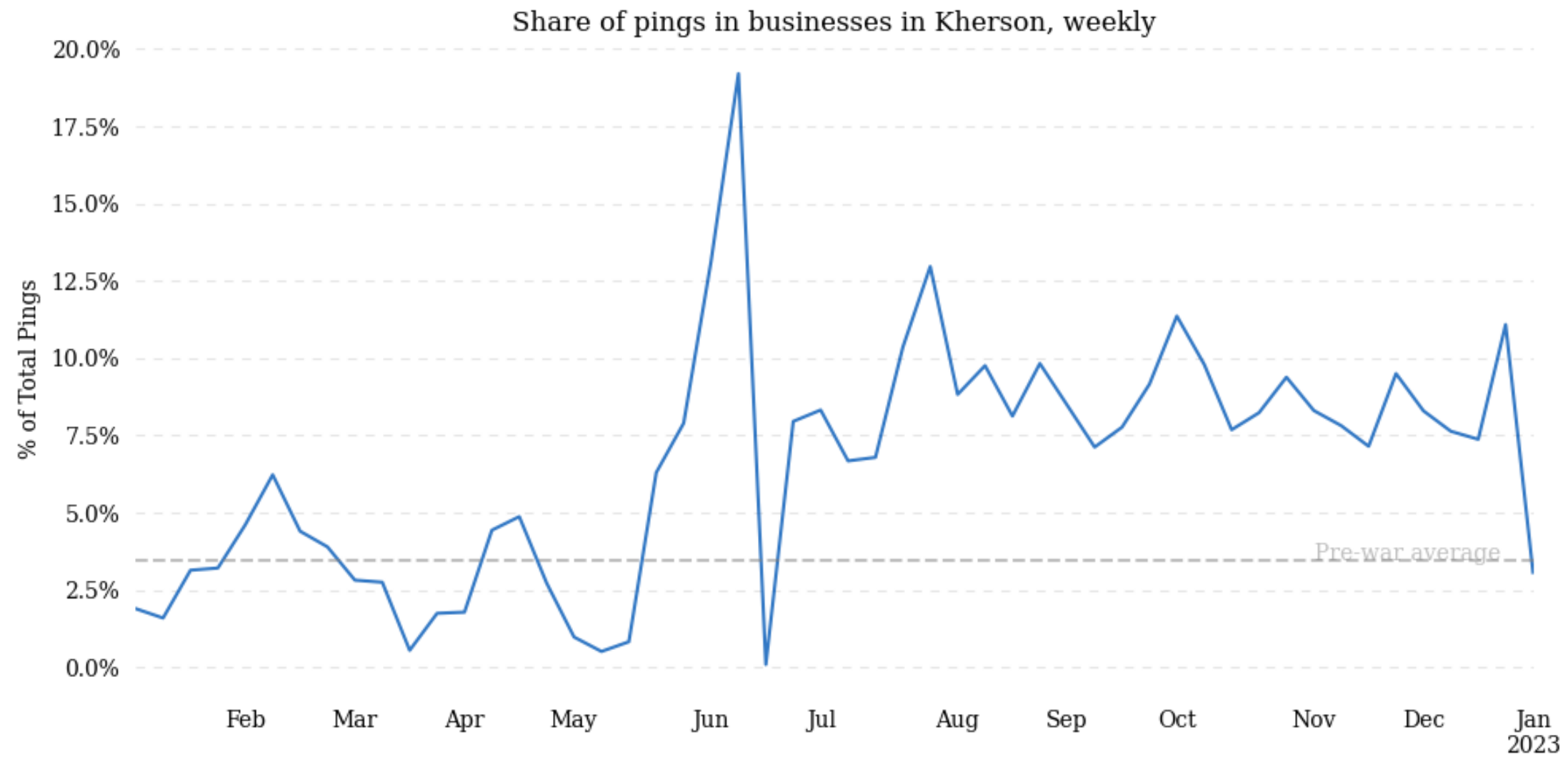
INSIGHTS FROM ANONYMIZED MOBILITY DATA



Sample Size: 30,000 devices per month – 10% of pre-war Kherson population

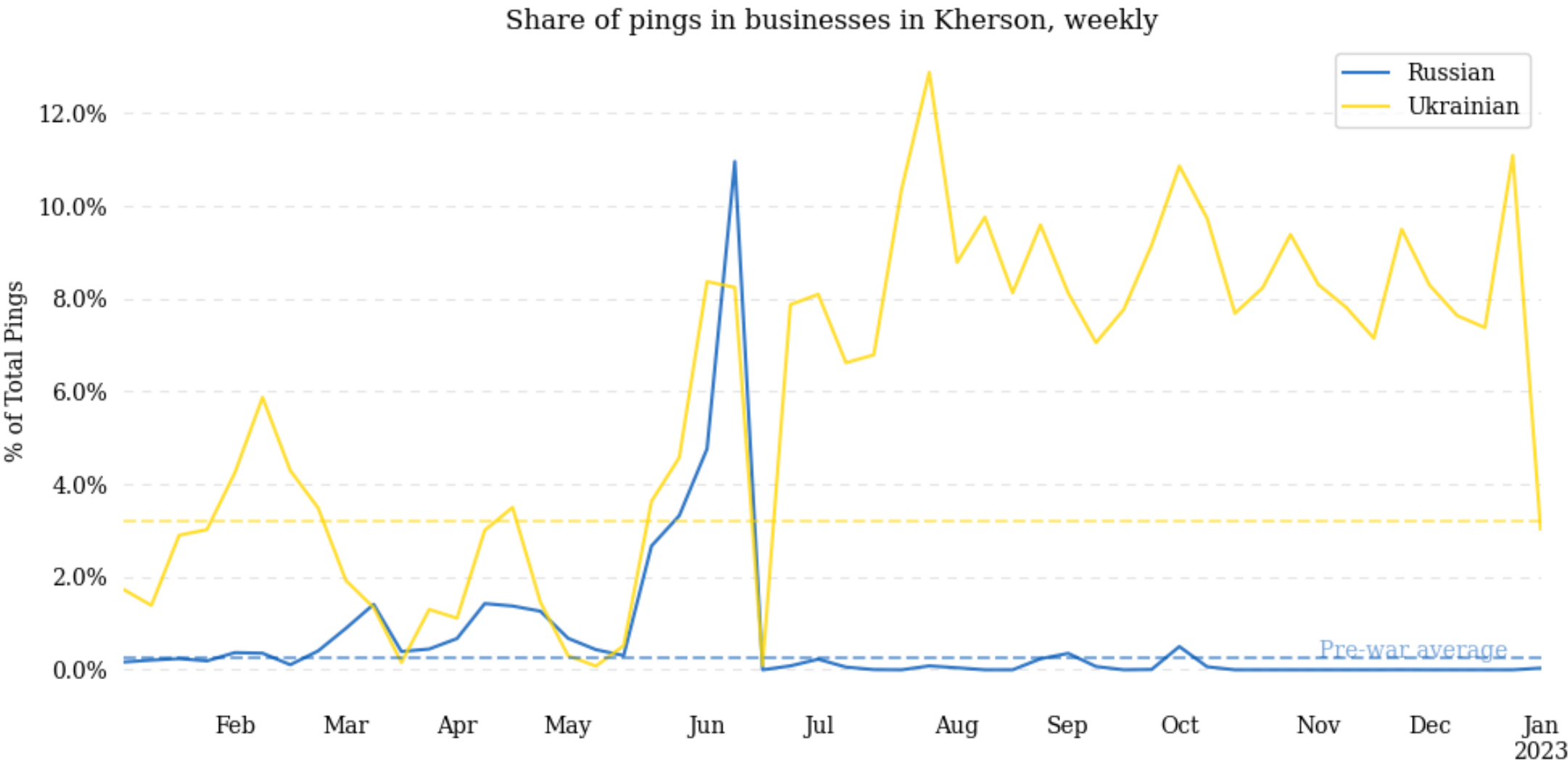
BUSINESS ACTIVITY IN KHERSON

INSIGHTS FROM ANONYMIZED MOBILITY DATA



RUSSIAN PRESENCE AT KHERSON'S BUSINESSES

INSIGHTS FROM ANONYMIZED MOBILITY DATA



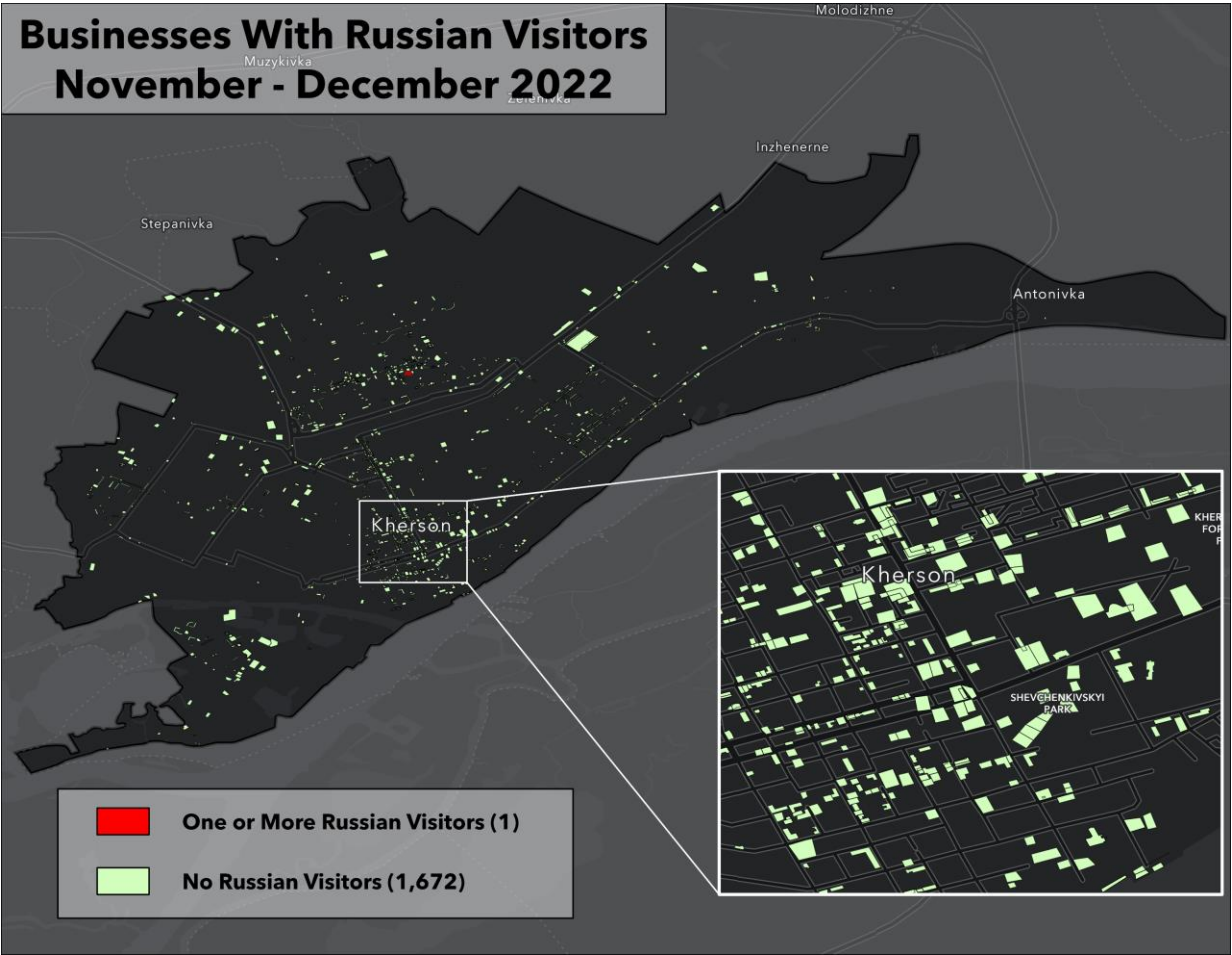
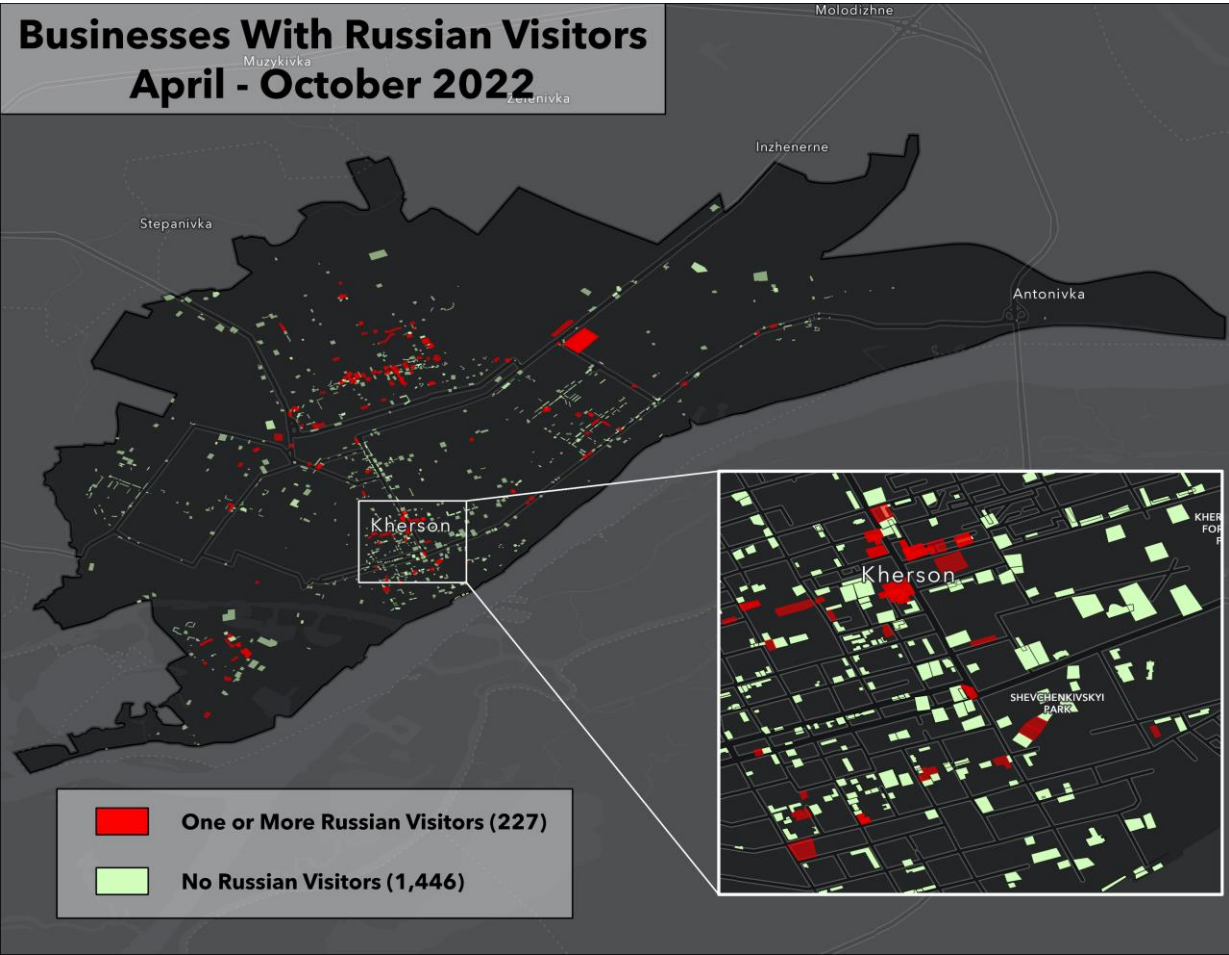
RUSSIAN PRESENCE IN KHERSON

INSIGHTS FROM ANONYMIZED MOBILITY DATA



RUSSIAN PRESENCE AT KHERSON'S BUSINESSES

INSIGHTS FROM ANONYMIZED MOBILITY DATA



• Sample Size: 220,000 Ukrainian devices and 3,000 Russian devices (2021-2022)



THANK YOU



GAME CHANGERS

