



PRESS RELEASE

Ipsos Ukraine Resilience Monitor measures toll of war on livelihood and access to basic services in major cities

Ukrainians put onus on national government and local authorities to lead reconstruction efforts

Washington, DC, October 6, 2022 – A new Ipsos survey conducted in Ukraine among 3,000 adults finds that most have suffered substantial economic loss since the Russian invasion on February 24. The September 2022 wave of the Ipsos Ukraine Resilience Monitor estimates that employment has dropped significantly, especially in the frontline cities of Kharkiv and Mykolaiv where less than half of those surveyed are currently working. Overall, most Ukrainians surveyed report having incurred significant income loss over the past seven months. Yet despite the economic hardships, most of those who have a regular source of personal income such as a salary or a pension say they have been receiving payments on time.

The survey finds significant differences between the frontline cities and those in the rear when it comes to access to essential services. In Mykolaiv, only 55% reported having access to heating, 43% to hot water, and 26% to safe drinking water.

Ukrainians widely expect their government to lead reconstruction efforts. In all 5 frontline and rear cities surveyed, majorities say that the national government and the local authorities should take the responsibility for rebuilding their city.

Detailed Findings

Since the onset of the war, employment in frontline cities has plummeted. Only 40% of September survey respondents in Dnipro and 47% in Kharkiv reported being currently employed either full-time or part-time compared with 75% and 82%, respectively, who said they were employed before the Russian invasion – a drop of 35 percentage points in both cities. In both Kyiv and Dnipro, which are located in the rear of the combat zones, 63% reported being currently employed, 19 points less than the 82% who said they were employed before the invasion. Lviv, furthest from the frontline shows the highest level of employment (70%) and the smallest loss (9 points).

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Frontline cities have experienced the sharpest job loss

Difference between percent employed now and percent employed pre-war (percentage points)

Frontline cities



Rear cities



Furthest from frontline



% Employed Now [Full time + Part time] - Employed Pre-War [Full time + Part time] Q: Do you work now (we are talking about paid employment)? Q: Please, indicate what was your employment status before February 24, 2022?

Source: Ipsos Ukraine Resilience Monitor • Created with Datawrapper

Majorities in four of the five cities surveyed say that they have experienced significant loss of income or have no personal income: 71% in Mykolaiv, 70% in Kharkiv, 59% in Dnipro, and 56% in Kyiv. In Lviv 38% did.

Ukrainians who stayed in frontline cities either don't have any income or have experienced significant income loss

% of non-IDP (internally displaced people) who have experienced significant loss of income or have no personal income

Frontline cities



Rear cities



Furthest from frontline



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

Source: Ipsos Ukraine Resilience Monitor • [Get the data](#) • Created with [Datawrapper](#)



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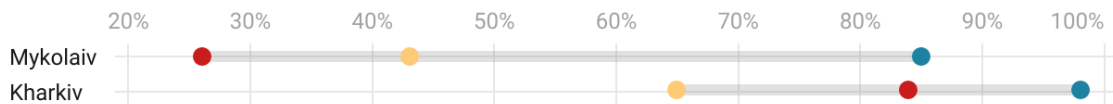
The September survey finds many essential services working in all or most cities – with notable exceptions. At least 98% in all five cities had access to electricity and to a mobile phone signal and at least 90% had internet access. However, while most in Lviv (91%), Kyiv (85%) Dnipro (81%) and Kharkiv (84%) reported having access to safe drinking water, it is only the case of 26% in Mykolaiv, which has been relentlessly bombed over the past seven months. Other essential services are also faltering in the city: only 55% of its residents report having heat and 43% hot water.

Most of Mykolaiv’s residents don’t have access to safe drinking water

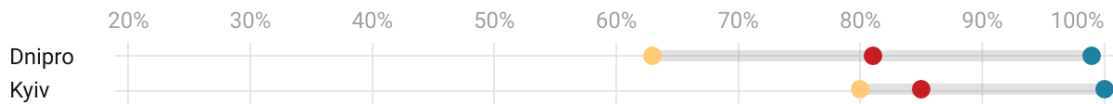
Percent who have access to...

● Cold Water ● Hot water ● Safe drinking water

Frontline cities



Rear cities



Furthest from frontline



Q: At the place where you live at the moment (your home or temporary housing), do you have access to...

Source: Ipsos Ukraine Resilience Monitor • Created with Datawrapper

In all the five cities, only between one quarter and one-third report having experienced any delay with the payment of their source of personal income. Among those who did experience delays in salary payments, most say it is by no more than two weeks (between 59% in Kharkiv and 73% in Lviv).

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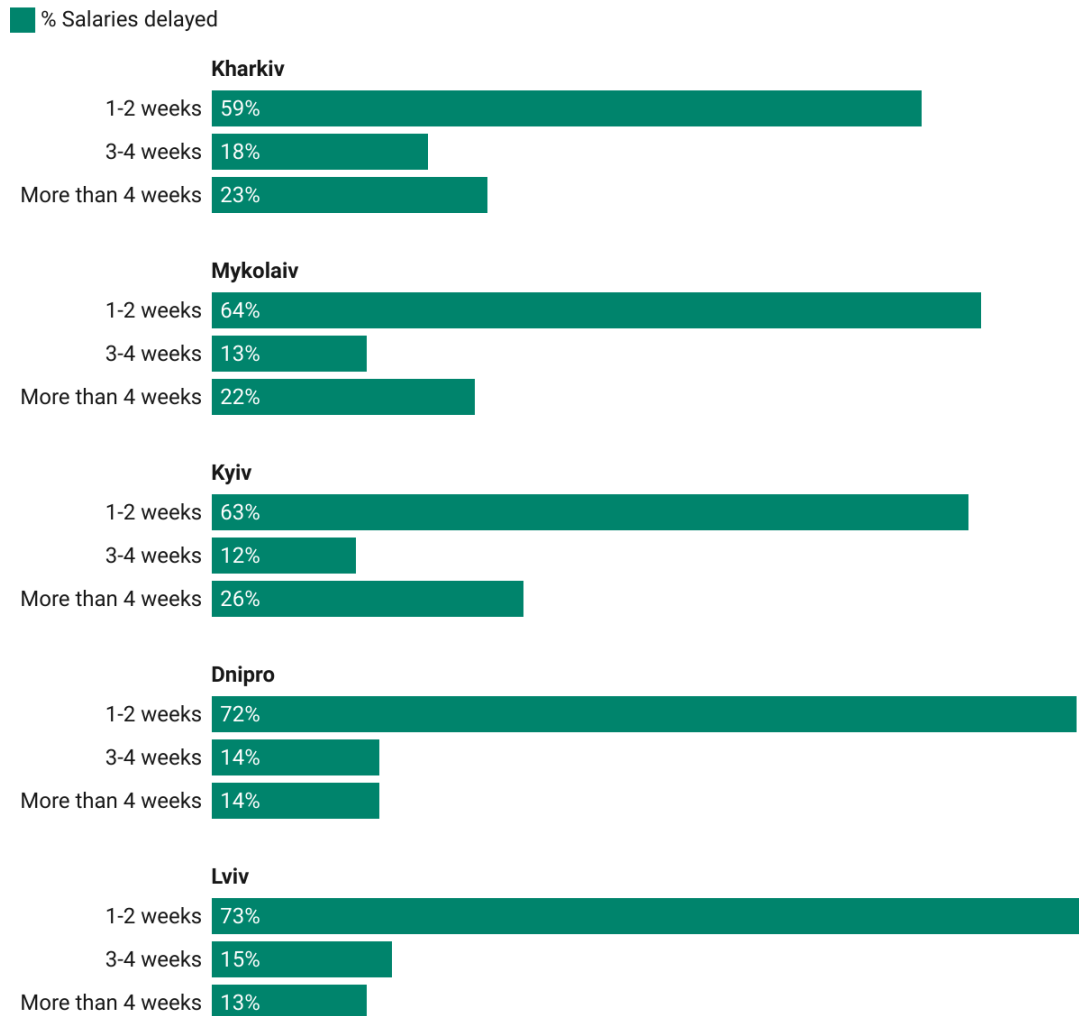




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If people do experience a delay in their salary, it mostly comes within a week or two

Among people who have experienced a delay in their salary, how long that delay took



Source: Ipsos Ukraine Resilience Monitor • Created with Datawrapper

Lastly, across all surveyed cities, rebuilding is firmly believed to be the responsibility of the Ukrainian national government and local administration (64% and 63%, respectively on average across the five cities). These findings show that, although Ukrainians expect to be empowered by the international community, the vast majority put the onus of reconstruction on their country.

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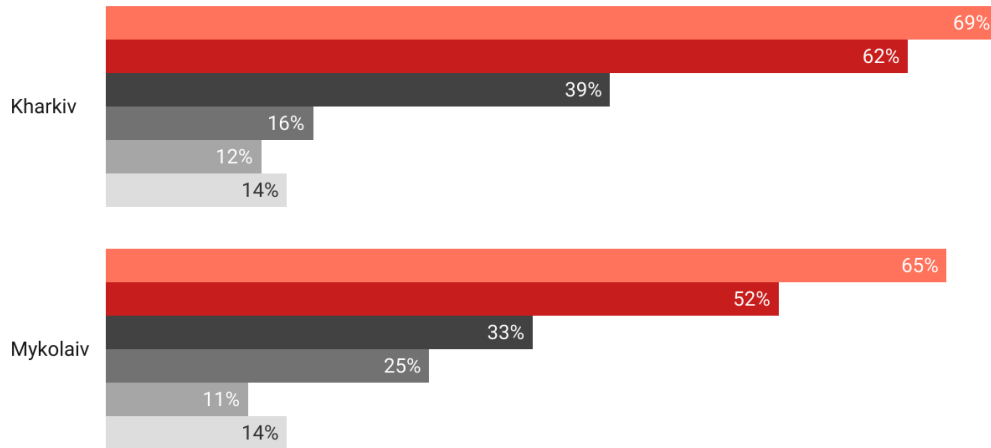
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Most believe that rebuilding should fall to the Ukrainian government and local administrations

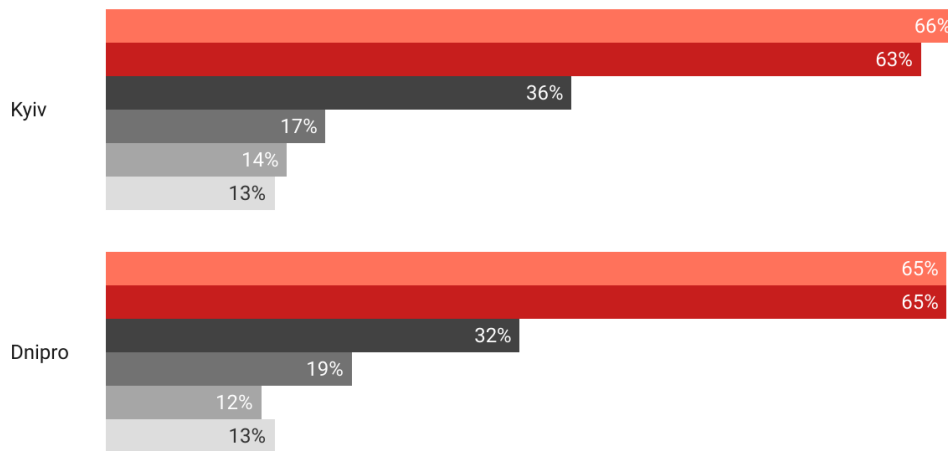
Percent who think the responsibility to reconstruct their cities should fall to...

■ Local Administration
 ■ Ukraine Government
 ■ Ukraine Civil Society
 ■ International Civil Society
 ■ International finance organizations
 ■ Foreign governments

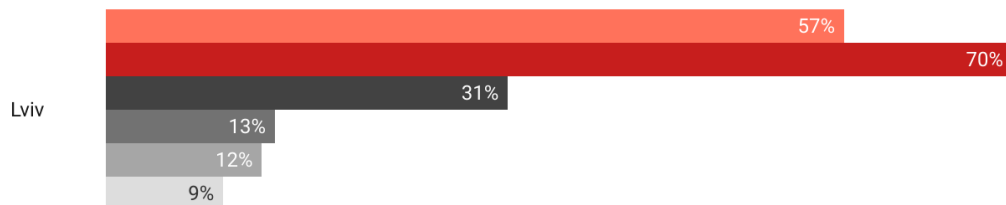
Frontline cities



Rear cities



Furthest from frontline



Q. Reconstruction Responsibility: In your opinion, which authority should take the responsibility to plan/execute/oversee the damage reconstruction in the city of [Text: City Q5]

Source: Ipsos Ukraine Resilience Monitor • Created with Datawrapper

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These are the findings of an Ipsos survey conducted September 3-8, 2022, among 3,001 adults aged 18-65 currently residing in Kyiv, Kharkiv, Dnipro, Mykolaiv and Lviv. The sample consists of 600 adults living in each of the five cities (601 in Kyiv). Interviews were conducted in Ukrainian on Ipsos' own survey platform.

The sample for each city is balanced by gender and age weight to reflect the structure of the adult population identified in Ipsos's Stand with Ukraine Barometer – a reference study based on 4,000 interviews over 5 waves/months among adults aged 18-55 residing in cities of 50,000 inhabitants across Ukraine (excluding ATO) with a natural flow on current region, gender and age, and quotas by region and size of city of residence before February 24, 2022.

Where results do not sum to 100 or the 'difference' appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses or the exclusion of don't knows or not stated responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll of 600 accurate to +/- 4.9 percentage points.

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For complete results, please refer to the following annotated questionnaire:

[Full Annotated Questionnaire](#)

Do you work now (we are talking about paid employment)?

	TOTAL	Kyiv	Lviv	Kharkiv	Dnipro	Mykolaiv
Work – FULL-TIME (%)	40%	47%	54%	31%	47%	24%
Work – PART-TIME (%)	16%	17%	17%	16%	16%	16%
on PAID vacation (%)	1%	0%	1%	1%	1%	1%
on UNPAID vacation (%)	6%	4%	2%	10%	4%	9%
UNEMPLOYED, LOOKING FOR A JOB (%)	20%	17%	13%	24%	17%	29%
UNEMPLOYED, NOT LOOKING FOR A JOB (%)	4%	3%	2%	5%	4%	5%
DON'T WORK - retired, on a parental leave, studying, student (%)	13%	13%	12%	13%	11%	16%
Total (n)	3001	601	600	600	600	600

Please, indicate what was your employment status before February 24, 2022?

	TOTAL	Kyiv	Lviv	Kharkiv	Dnipro	Mykolaiv
Worked – FULL-TIME (%)	67%	68%	65%	71%	72%	58%
Worked – PART-TIME (%)	14%	14%	14%	11%	11%	18%
on PAID vacation (%)	0%	0%	0%	0%	0%	0%
on UNPAID vacation (%)	1%	0%	0%	0%	1%	1%
UNEMPLOYED, BETWEEN JOBS (%)	4%	3%	4%	4%	3%	5%
UNEMPLOYED, NOT LOOKING FOR A JOB (%)	3%	3%	3%	2%	3%	4%
DIDN'T WORK - retired, on a parental leave, studying, student (%)	12%	12%	13%	12%	10%	14%
Total (n)	3001	601	600	600	600	600

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

	TOTAL	Kyiv	Lviv	Kharkiv	Dnipro	Mykolaiv
Significantly decreased (%)	51%	51%	32%	60%	54%	56%
Slightly decreased (%)	21%	25%	33%	16%	20%	11%
Didn't change (%)	14%	12%	22%	10%	14%	11%
Slightly increased (%)	5%	6%	7%	3%	6%	4%
Significantly increased (%)	1%	0%	1%	1%	1%	2%
I don't have personal income (%)	8%	6%	5%	10%	5%	16%
Total (n)	3001	601	600	600	600	600

Do you experience delays in receiving any of regular income payments (salaries, pensions, benefits, etc.) now?

	TOTAL	Kyiv	Lviv	Kharkiv	Dnipro	Mykolaiv
Yes, I experience delays in regular income (%)	27%	23%	23%	31%	25%	34%
No delays (%)	51%	57%	62%	42%	58%	38%
I don't have personal income (%)	22%	20%	16%	28%	17%	28%

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Total (n)	3001	601	600	600	600	600
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Please, select all types of income where you experience delays now?

	TOTAL	Kyiv	Lviv	Kharkiv	Dnipro	Mykolaiv
Salary (%)	66%	73%	74%	66%	69%	54%
Pension (%)	7%	8%	4%	5%	3%	11%
Benefits (%)	11%	12%	6%	10%	10%	15%
Scholarship (%)	4%	5%	5%	4%	5%	5%
State grant payment (science, cultural, etc) (%)	16%	11%	11%	18%	17%	21%
Other, specify [TEXT BOX] (%)	12%	12%	11%	13%	11%	11%
Total (n)	823	138	138	188	154	205

For each type of income where you experience delays now – let us know the average duration of delay?

	1-2 weeks delay (%)	3-4 weeks delay (%)	1-2 months delay (%)	More than 2 months delay (%)	Total (n)
Salary	66%	15%	9%	11%	529
Pension	84%	8%	4%	4%	52
Benefits	48%	17%	18%	17%	90
Scholarship	50%	28%	19%	3%	33
State grant payment (science, cultural, etc)	47%	18%	15%	20%	145
Other, specify [TEXT BOX]	58%	4%	15%	23%	103

Please, indicate the type of entity where you are employed now?

	TOTAL	Kyiv	Lviv	Kharkiv	Dnipro	Mykolaiv
Self-employed, private entrepreneur (%)	16%	16%	14%	17%	15%	19%
Small or medium size private company (%)	32%	36%	35%	30%	34%	24%
Big private company (%)	17%	18%	17%	13%	25%	8%
State owned company/business (%)	14%	10%	12%	18%	14%	21%
Public service (%)	2%	2%	2%	1%	1%	5%
State or Local Administration Budget-funded entity (school, hospital, transport, municipal) (%)	11%	11%	14%	13%	5%	11%
Military service (%)	2%	2%	1%	1%	1%	3%
Police & Law enforcement (%)	1%	1%	1%	1%	1%	1%
Other, specify: [TEXT BOX] (%)	6%	5%	4%	7%	4%	9%
Total (n)	1894	398	439	361	398	298

Please, evaluate how easy for someone in the city of [TEXT: CITY Q5] to find a job now?

	TOTAL	Kyiv	Lviv	Kharkiv	Dnipro	Mykolaiv
Very easy (%)	1%	0%	1%	1%	1%	1%
Somewhat easy (%)	11%	14%	23%	3%	11%	2%
Somewhat difficult (%)	55%	61%	64%	49%	65%	38%

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Very difficult (%)	33%	25%	12%	48%	23%	59%
Total (n)	3001	601	600	600	600	600

Please, select the business and service areas that you believe are the fastest to recover [TEXT: CITY Q5].

	TOTAL	Kyiv	Lviv	Kharkiv	Dnipro	Mykolaiv
Entertainment (concerts, movies, etc.) (%)	3%	4%	7%	1%	4%	1%
Restaurants, bars, cafes (%)	23%	31%	31%	15%	23%	15%
Sports clubs (%)	4%	6%	5%	2%	7%	2%
Electronics retailers (%)	6%	5%	6%	5%	7%	8%
Beauty salons, beauticians, etc. (%)	16%	20%	18%	13%	20%	8%
Clothing and footwear retailers (%)	12%	14%	12%	12%	13%	10%
Services to repair house / apartment (%)	11%	10%	11%	14%	7%	12%
Municipal transport (%)	33%	37%	25%	46%	27%	32%
Supermarkets (%)	56%	68%	49%	65%	55%	42%
Small retailers (%)	23%	26%	17%	29%	20%	23%
Public utilities (%)	20%	20%	15%	37%	12%	16%
Rental of property (%)	17%	12%	34%	5%	26%	6%
Medical services (%)	22%	26%	22%	23%	21%	16%
Mobile communication and Internet (%)	21%	24%	21%	24%	19%	18%
Pharmacies (%)	47%	54%	44%	54%	46%	37%
IT, Software companies (%)	12%	16%	21%	8%	14%	3%
Banks / financial services (%)	23%	26%	22%	21%	28%	16%
Other, specify : [TEXT BOX] (%)	1%	0%	2%	0%	1%	1%
None	3%	1%	0%	2%	2%	7%
Hard to answer	11%	7%	11%	8%	13%	15%
Total (n)	3001	601	600	600	600	600

At the place where you live at the moment (your home or temporary housing), do you have access to

	TOTAL	Kyiv	Lviv	Kharkiv	Dnipro	Mykolaiv
Cold water (%)	96%	100%	99%	98%	99%	85%
Safe drinking water (%)	73%	85%	91%	84%	81%	26%
Hot water (%)	68%	80%	91%	65%	63%	43%
Gas (%)	84%	73%	93%	82%	88%	88%
Electricity (%)	99%	100%	99%	100%	100%	98%
Heating (%)	74%	76%	90%	66%	82%	55%
Internet (%)	96%	99%	98%	95%	98%	92%
Mobile phone signal (%)	99%	100%	100%	99%	100%	98%
Total (n)	3001	601	600	600	600	600



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Thinking of your life in [TEXT: CITY Q5], please indicate your personal top 5 priorities needed to address immediately:

	TOTAL	Kyiv	Lviv	Kharkiv	Dnipro	Mykolaiv
Water Electricity Gas (%)	48%	43%	39%	43%	36%	79%
Water supply restoration	10%	2%	1%	4%	2%	42%
Safe drinking water supply	21%	11%	13%	11%	13%	57%
Hot water supply	9%	17%	6%	13%	4%	3%
Gas supply restoration	2%	2%	1%	2%	1%	2%
Electricity supply restoration	2%	1%	2%	3%	1%	2%
Heating supply	11%	13%	7%	18%	12%	8%
Normal voltage electricity supply	5%	4%	6%	6%	4%	4%
Steady (without interruptions) electricity supply	10%	12%	9%	14%	9%	7%
Improve quality of gas supplied	7%	4%	11%	5%	7%	5%
Medical Services Medications (%)	41%	42%	42%	42%	46%	34%
Emergency medical services availability	6%	6%	7%	6%	7%	4%
Ambulance availability	6%	6%	4%	8%	8%	5%
Family doctor service availability	9%	11%	9%	9%	8%	10%
Critical/regular treatment medicines availability	9%	9%	10%	9%	8%	6%
Hospice availability	3%	4%	4%	2%	4%	2%
Planned surgery availability	3%	2%	4%	3%	6%	2%
Access to affordable medications	22%	24%	24%	21%	26%	13%
Access to medical/special transportation	1%	2%	2%	1%	1%	1%
Housing Repairs (%)	24%	23%	23%	29%	23%	22%
Support in renovation of damaged housing	11%	10%	4%	18%	7%	15%
Availability of temporary housing	3%	3%	4%	4%	3%	3%
Availability of long-term housing	7%	7%	9%	6%	10%	4%
Improvement of temporary housing living conditions	6%	7%	8%	6%	7%	3%
Transportation Roads (%)	36%	41%	41%	31%	37%	29%
Roads reconstruction	14%	19%	19%	8%	17%	7%
Bridges and road connections operational	4%	9%	4%	2%	2%	2%
Public transport availability	17%	17%	20%	18%	18%	11%
Railroad transport availability	4%	3%	3%	3%	2%	11%
Evacuation transport availability	4%	4%	4%	7%	4%	3%
Telecom Internet (%)	16%	17%	17%	18%	16%	13%
Steady mobile, m-data connection	10%	12%	10%	10%	10%	7%
Restore steady internet connection	5%	4%	5%	6%	5%	4%
Affordable replacement for lost/damaged mobile device	3%	3%	3%	3%	2%	3%
Social Support (%)	53%	54%	51%	59%	56%	46%

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Help to restore lost/damaged documents	7%	7%	6%	7%	8%	8%
Mental & emotional health support	15%	14%	20%	14%	19%	8%
Improve access to social protection payments & services	28%	26%	22%	39%	25%	27%
Increase availability of kinder garden and schools (working parents' support)	10%	12%	12%	7%	14%	6%
Access to secondary school	14%	16%	14%	11%	18%	10%
Legal assistance	7%	5%	8%	5%	9%	5%
Total (n)	3001	601	600	600	600	600

Do you know about reconstruction activities in the city of [TEXT: CITY Q5] financed by:

	I know for sure about the activity (%)	I only heard of the activity (%)	I have not heard of the activity (%)	Total (n)
Local Administration (%)	30%	37%	33%	3001
Ukraine Government (%)	19%	39%	43%	3001
Ukrainian Civil Society (donated by Ukrainian citizens and business) (%)	16%	34%	50%	3001
International Civil Society (non-government international organizations) (%)	10%	36%	54%	3001
International finance organizations (IMF, EBRD, etc) (%)	13%	41%	47%	3001
Foreign governments (%)	11%	41%	48%	3001

In your opinion, which authority should take the responsibility to plan/execute/oversee the damage reconstruction in the city of [TEXT: CITY Q5]:

	TOTAL	Kyiv	Lviv	Kharkiv	Dnipro	Mykolaiv
Local Administration (%)	63%	63%	70%	62%	65%	52%
Ukraine Government (%)	64%	66%	57%	69%	65%	65%
Ukrainian Civil Society (donated by Ukrainian citizens and business) (%)	12%	14%	12%	12%	12%	11%
International Civil Society (non-government international organizations) (%)	13%	13%	9%	14%	13%	14%
International finance organizations (IMF, EBRD, etc) (%)	34%	36%	31%	39%	32%	33%
Foreign governments (%)	20%	17%	13%	26%	19%	25%
Other, please specify [TEXT BOX] (%)	2%	1%	1%	2%	2%	2%
Total (n)	3001	601	600	600	600	600



PRESS RELEASE

ABOUT IPSOS

Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing over 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

Our tagline "Game Changers" sums up our ambition to help our 5,000 customers move confidently through a rapidly changing world.

Founded in France in 1975, Ipsos has been listed on the Euronext Paris since July 1, 1999. The company is part of the SBF 120 and Mid-60 indices and is eligible for the Deferred Settlement Service (SRD). ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP www.ipsos.com

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GAME CHANGERS 