



Diagnosing the state of Ukrainian business during a full-scale war between Russia and Ukraine

Analytical report



Data collection method: a self-administered survey via the mobile application.



Target audience of the survey: men and women who are owners / executives of small, medium and large businesses.



Number of successful interviews: 355.



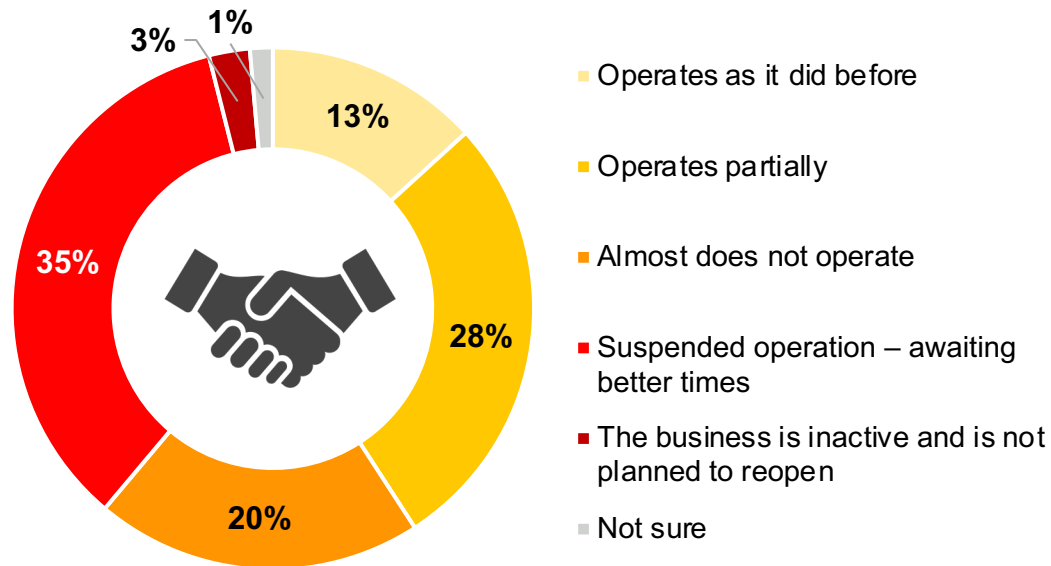
Field period of the survey: March 22nd 2022 (14:30 - 21:40).

SUMMARY OF THE STUDY

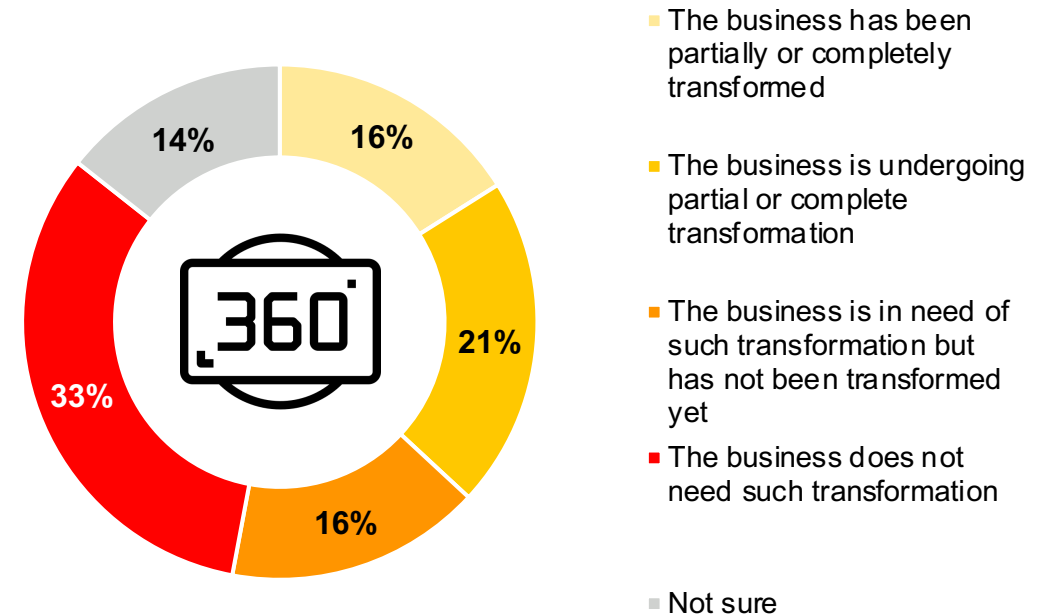
- ❑ The war has significantly affected the functioning of Ukrainian business: up to 85% of businesses switched to partial operation or have completely ceased to operate; among them 1% have stopped their activities and do not plan to resume them and 35% suspended their activities, awaiting better times.
- ❑ Sectoral transformation as one of the ways to save a business from closing down turned out to be relevant for 37% of the enterprises included in the study – 21% of businesses are undergoing such transformation and 16% have already been completely or partially transformed. Potentially another 16% will join those already transformed. The most popular field of business activity during the war is retail trade in food and non-food products – in total, up to 24% of the businesses that took part in the study accounted for these two areas.
- ❑ Interestingly, there are Ukrainian businesses whose scale of operation has grown compared to the pre-war period, judging by such indicators as workload, percentage of personnel involved in the work process, work planned for the next week and month. However, in general, the workload of the vast majority of companies is still significantly reduced – 86% of enterprises have less workload than before the war.
- ❑ Regarding the difficulties that arise in organizing the work of a business, half of the audience brings up lack of orders; 29% mention logistical issues.
- ❑ When it comes to government assistance, 37% of the audience expect tax holidays. Other mentions include logistical assistance, access to cheap money, product promotion, and preventing key employees from going abroad or being conscripted.
- ❑ Difficult times for businesses have also had a significant impact on whether the employees and suppliers are being financially compensated – 3-5% of businesses provide relatively larger payments, 14-19% – payments at the pre-war level. The rest of the businesses either lowered the payments or stopped them altogether – 39% do not pay wages, and 29% do not pay suppliers.

CURRENT STATE OF THE BUSINESS

Current status



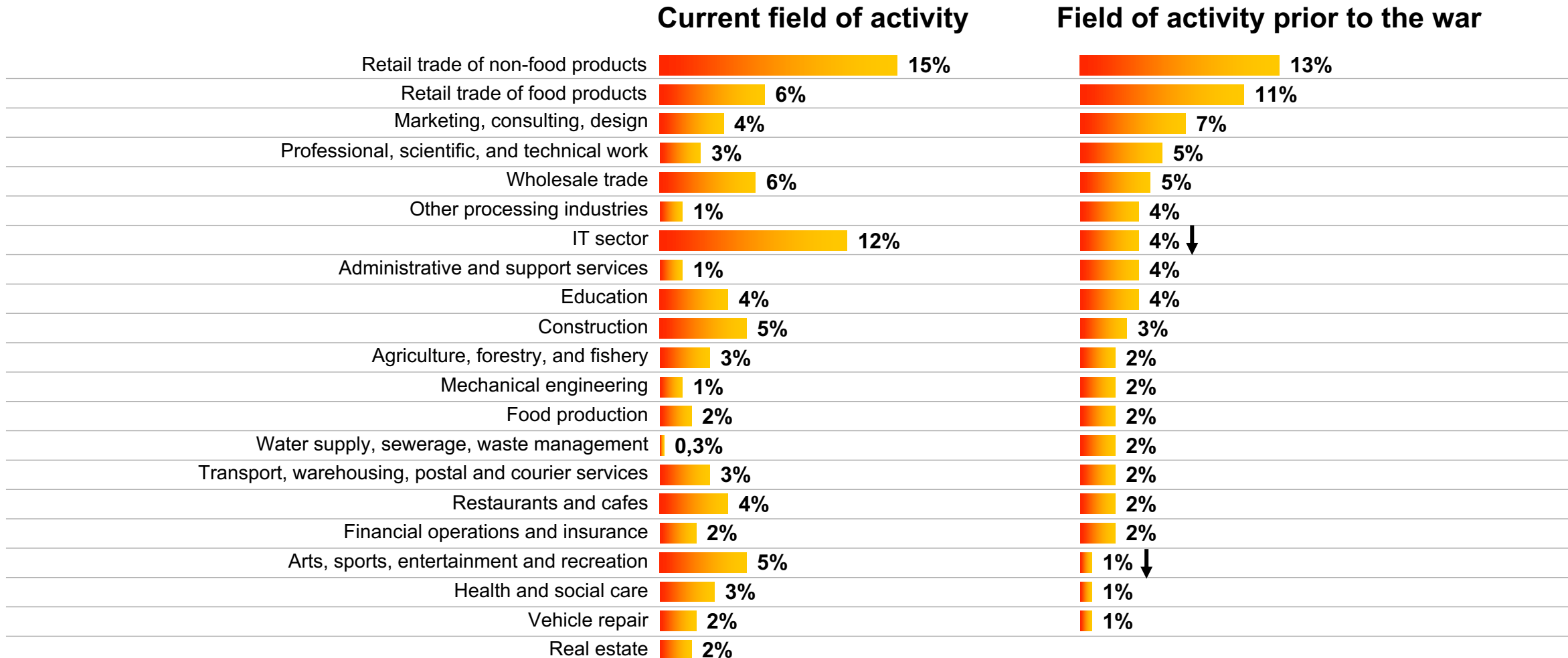
Sectoral transformation of business, caused by the war



N=355 (all the respondents)

The survey was conducted by Gradus Research using self-administered questionnaires that were filled out via the mobile application. Gradus's Online panel reflects the structure of the population of cities with more than 50 thousand inhabitants aged 18-60 years by gender, age, size of the settlement and region. The field period of the survey: March 22nd 2022 (14:30-21:40). Sample size: 355 respondents.

CHANGES IN FIELDS OF BUSINESS ACTIVITY



N=355 (all the respondents)

Respondents whose business has been subjected to sectoral transformation as a result of Russia's war against Ukraine, N=131

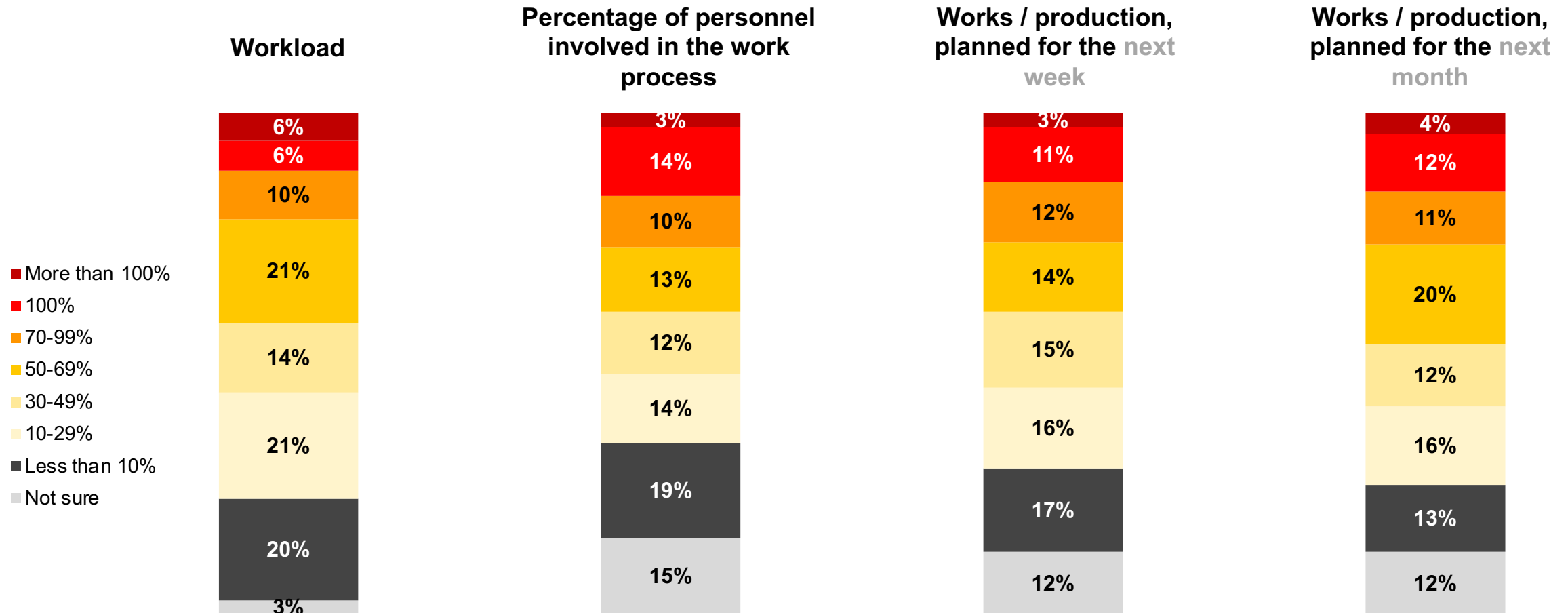
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↑ Numbers that are statistically significantly higher / lower, compared to the current field

DYNAMICS OF KEY INDICATORS OF BUSINESSES' CAPACITY

COMPARED TO THE PRE-WAR PERIOD

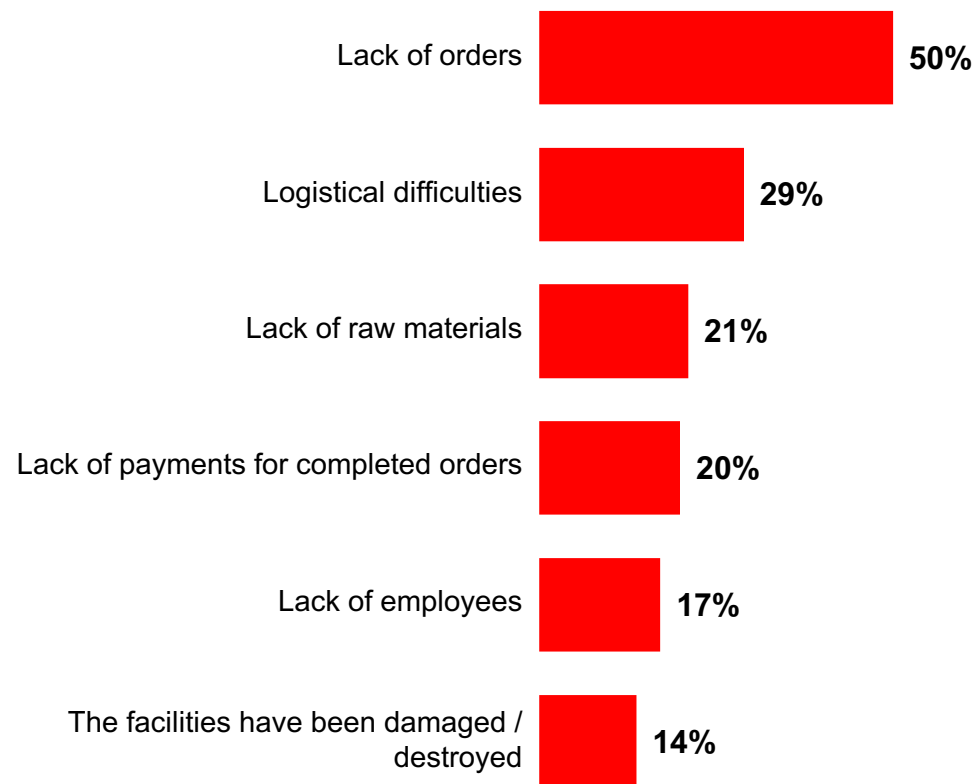


Respondents whose business is currently operating, N=217

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DIFFICULTIES AND NECESSARY ASSISTANCE

Difficulties in organizing work



Government-provided necessary assistance



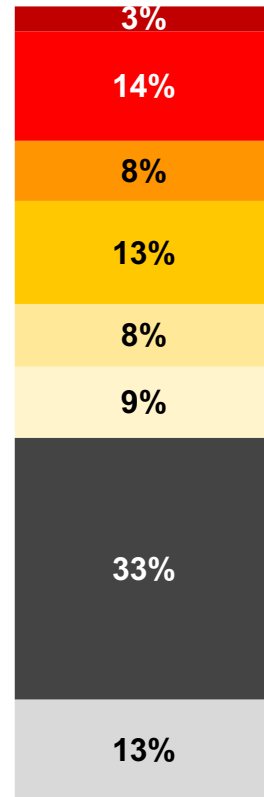
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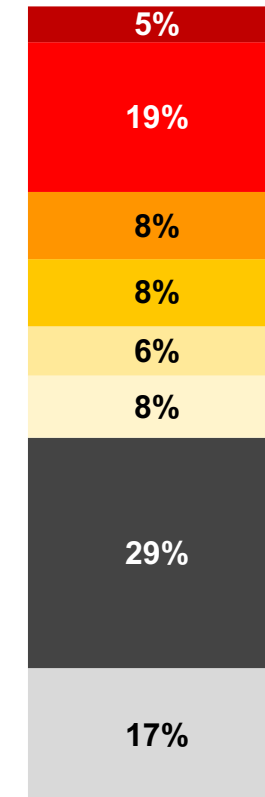
INTENTION REGARDING MAKING PAYMENTS TO EMPLOYEES AND SUPPLIERS

COMPARED TO THE PRE-WAR PERIOD

Wage payments



Payments to suppliers for goods / services / raw materials provided etc.



- Yes, more than 100%
- Yes, 100%
- Yes, 70-99%
- Yes, 50-69%
- Yes, 30-49%
- Yes, less than 30%
- No intention to make any payments
- Not sure

Respondents whose business is currently operating, N=217

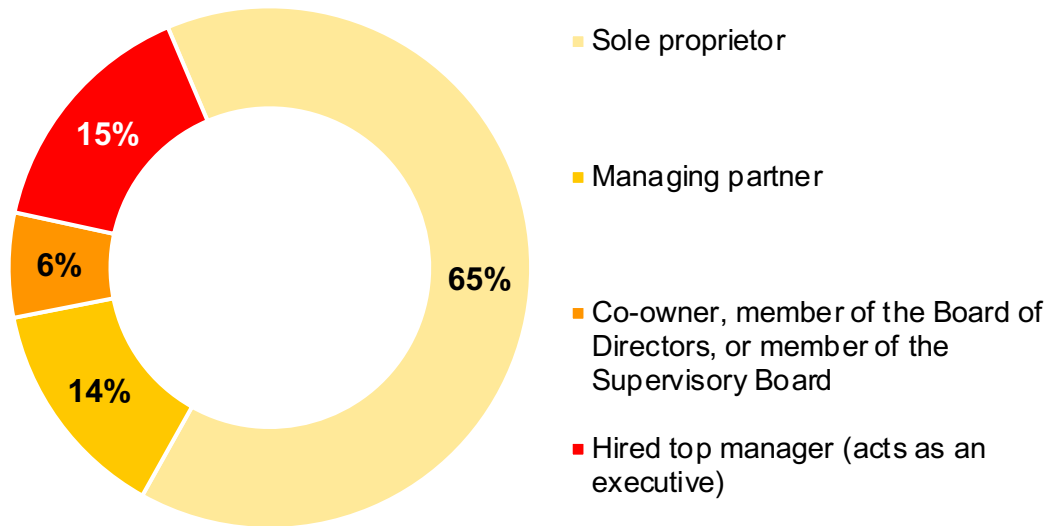
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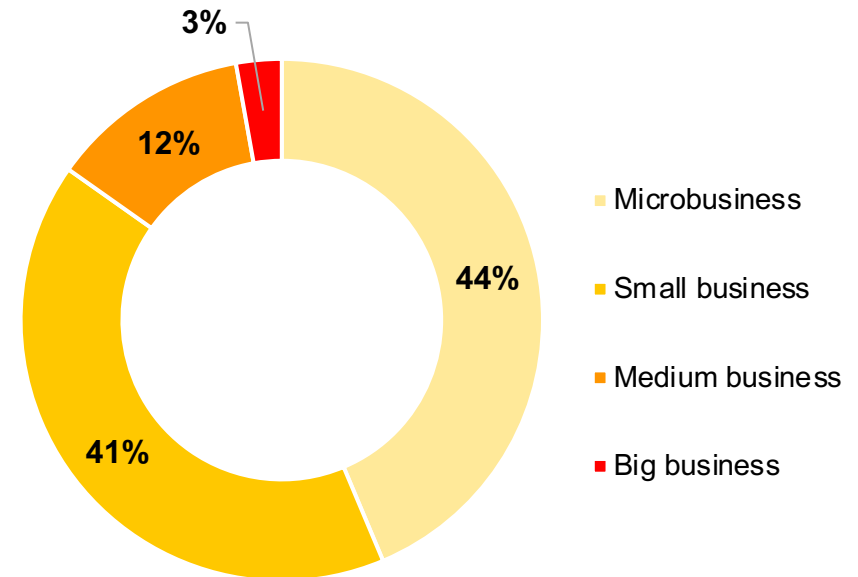
SAMPLE CHARACTERISTICS

SAMPLE CHARACTERISTICS: DESCRIPTION OF THE AUDIENCE INCLUDED IN THE RESEARCH (1/2)

Distribution of sample by job position



Business size

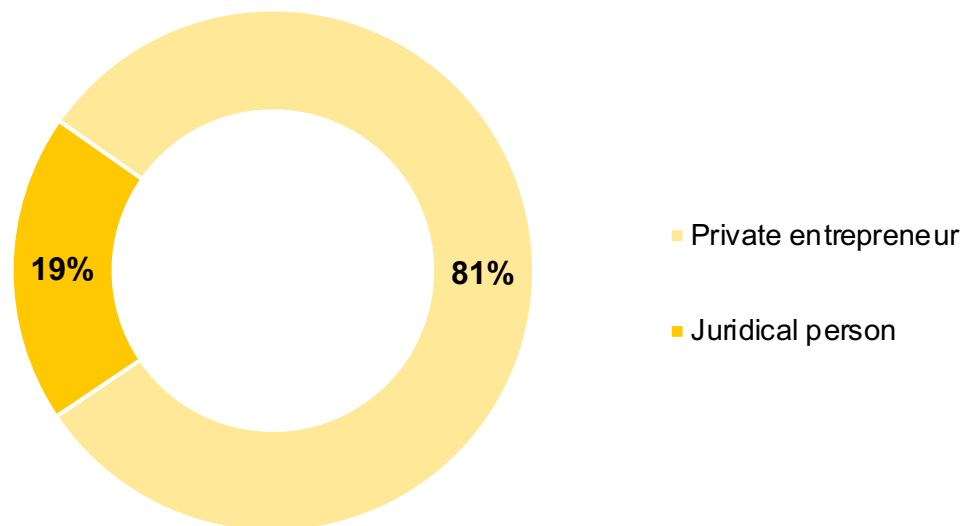


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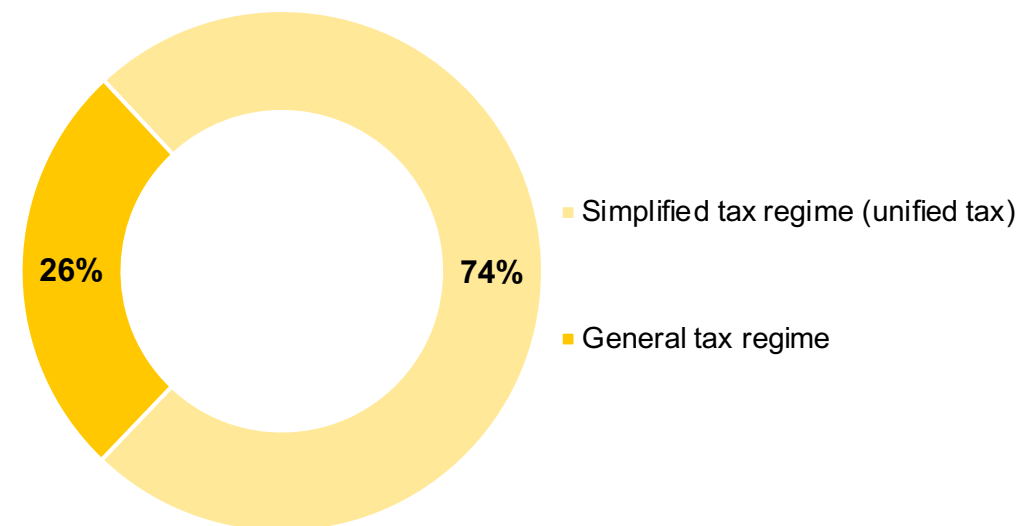
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SAMPLE CHARACTERISTICS: DESCRIPTION OF THE AUDIENCE INCLUDED IN THE RESEARCH (2/2)

Organizational and legal form of doing business



Tax system

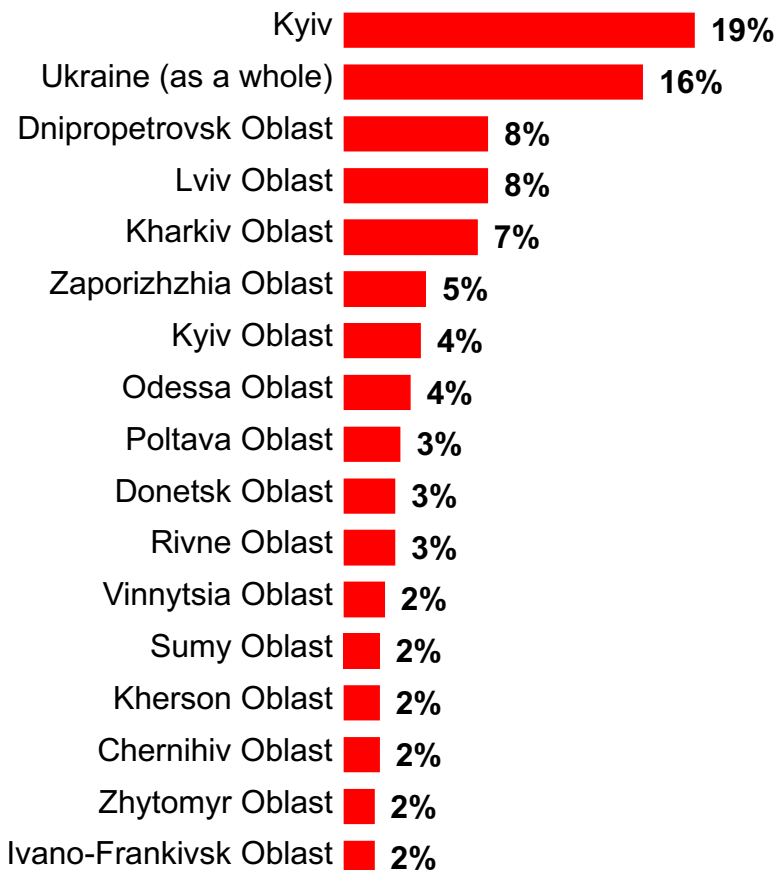


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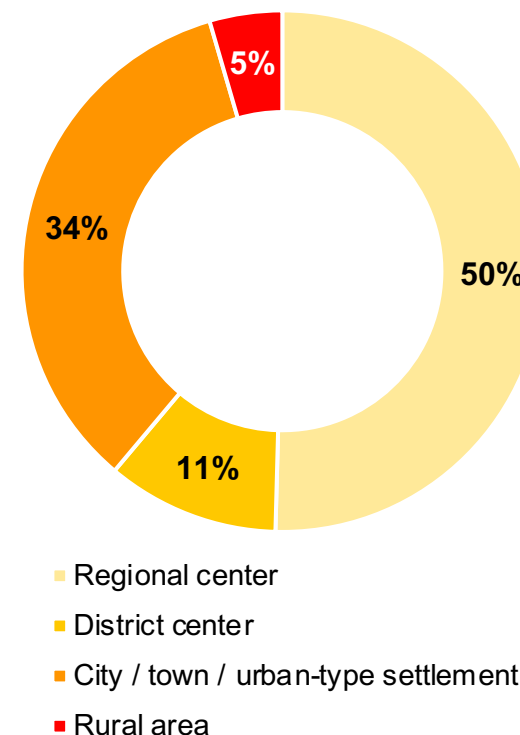
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SAMPLE CHARACTERISTICS: GEOGRAPHICAL SCOPE OF THE BUSINESSES' ACTIVITY

Oblast where the business is situated



Type of settlement where the business is situated



N=355 (all the respondents)

* Only oblasts that have been mentioned in more than 1% of the cases are shown

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Gradus

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