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KEY FINDINGS

- There are severe heating challenges for the population across Ukraine, particularly in more heavily conflict-affected areas. **Almost half of the General Population Survey (GPS) respondents who are considering relocation cite the arrival of winter as a significant influencing factor.**
- Housing adequacy in Ukraine varies depending on displacement status and proximity to near-frontline locations. While **a majority of residents report their housing as adequate, IDPs, especially in the South, report considerably higher rates of inadequate housing** in comparison to the general population. Among those who consider their housing inadequate, **there is a widespread need for repairs.**
- There is **a prevalent need** across Ukraine for **winter essentials, such as bedding kits, blankets, warm clothing, and heating appliances** in preparation for electricity shortages and harsh winter conditions. This need is particularly acute among IDPs, who face the greatest challenges in securing these essentials.
- The economic hardships in securing winter essentials are pervasive, with **the majority of Ukrainians unable to afford necessary solid fuels.**

BACKGROUND

An estimated 3,674,000 people remain internally displaced in Ukraine as of October 2023, and an estimated 6,338,100 are displaced abroad (UNHCR, as of 21 November 2023). International Organization for Migration (IOM) estimates that 4,573,000 people have returned to their place of habitual residence in Ukraine following a period of displacement, 22 per cent of whom returned from abroad. Another 298,000 are estimated to have returned from abroad into internal displacement.

As of November 2023, Ukraine is facing not only the immediate impact of conflict but also the ensuing challenges as the country entered the winter months. The situation has brought to the forefront issues related to heating, housing, winter-related needs and the ability to withstand the harsh winter conditions.

This brief presents insights into winterization preparedness, encompassing aspects such as access to heating, the adequacy of housing for winter conditions, and the specific winter-related needs of the population. These findings come from the General Population Survey (GPS), the Solid Fuel Assessment (SFA) and the Mobility and Needs Assessment (MaNA). The aim is to guide the humanitarian response stakeholders in formulating and implementing targeted winterization strategies.

METHODOLOGY

The General Population Survey data presented in this report was commissioned by the IOM and collected by Multicultural Insights as part of round 14. Data was collected through phone-based interviews, with respondents identified through a nationally representative screening survey of 20,000 individuals. It includes interviews with 1,493 IDPs, 1,653 returnees, and 2,002 non-displaced individuals carried out between 3 and 25 September 2023. Please find the latest reports here: [Displacement Report and Returns Report](#).

All interviews were conducted using a random-digit-dial and computer-assisted telephone interviewing approach, generating results with an overall confidence level of 95% and margin of error of 1.35%. The survey included all of Ukraine, excluding the Crimean Peninsula and the areas of Donetsk, Luhanska, Khersonska, and Zaporizka oblasts under the temporary military control of the Russian Federation where phone coverage by Ukrainian operators is not available. All interviews were anonymous, and respondents were asked for consent before starting the interview. The teams consisted of male and female interviewers, and the interviews were conducted in Ukrainian and Russian, with language selection based on the preference of each respondent.

The [Solid Fuel Assessment](#) is a bi-monthly project run by IOM aimed at understanding the supply, demand, and pricing of solid fuels in Ukraine, crucial for winterization efforts. Conducted every two months over a 10-day period, the SFA covers 23 oblasts in Ukraine, focusing on both urban centers and rural or frontline areas. Data was collected between 15 and 22 August 2023 through interviews with vendors and community focal points, targeting at least two of each per location. These interviews collect information on fuel types, prices, availability, and quality, with a special emphasis on differentiating fuel quality based on heat generation properties. The SFA includes a range of marketplaces, from manufacturers to local shops and large trading networks. While the findings provide valuable insights into regional solid fuel markets, they are not broadly representative but offer specific snapshots of supply dynamics in the assessed locations. This targeted approach allows for a nuanced understanding of fuel needs and availability across diverse Ukrainian regions.

For further details on the methodology and sampling design, please refer to the GPS [Methodological Note](#) and [SFA Report](#).

ACCESS TO HEATING AND RISK OF WINTER-RELATED DISPLACEMENT

KEY FINDING

1 There are significant gaps in heating access across Ukraine, especially in frontline oblasts, with the GPS data highlighting a substantial shortfall in essential heating appliances and the anticipated shortages of solid fuel during the winter, due to the primary and secondary impact of the ongoing war and subsequent access or supply-chain limitations. Concurrently, nearly half of the GPS respondents who consider relocation cite the arrival of winter as a motivating factor. Households face a high risk of heating shortages due to limited access to secondary or tertiary heating sources, particularly in scenarios of infrastructure attacks.

Access to heating

Access to reliable heating is not consistent across Ukraine. In some oblasts, residents may have access to only one or none of the heating modes. In several oblasts, including Donetsk, Kyivska, Chernivetska, Ternopil'ska and Volyn'ska, Key Informants (KIs) reported few (1-25%) residents having access to gas heating systems. Similarly, in Chernivetska, Odeska and Zhytomyr'ska oblasts, only some (1-25%) residents with access to electric heating systems were reported by KIs. **The lack of secondary or tertiary heating methods may compromise the resilience of households during the winter season.**

In rural areas, 54 per cent of respondents identify the arrival of winter as a significant reason for considering relocation, highlighting the urgency of heating access in these areas. Conversely, in large cities, only 26 per cent view winter as a significant motivator for relocation, suggesting higher levels of heating access to more reliable or diverse heating resources in urban settings. This underscores that inadequate access to heating resources and the potential for electricity shortages can influence displacement decisions.

Risk of displacement

A relatively small fraction, five per cent, of all respondents reported considering leaving their current location, rising significantly to 22 per cent among IDP respondents and remaining at five per cent for returnees. **Within this specific subset, a considerable 44 per cent cite winter as a significant motivator for their decision.**

Perception on the recommended seasonal quantity of firewood

SFA findings suggest that the **currently recommended seasonal quantity of firewood** (8m³ per household) is perceived as **insufficient by a significant proportion of vendors across the country.** Specifically, 42 per cent of vendors in urban areas and 37 per cent in rural areas, as well as 63 per cent in frontline areas regard this quantity as not sufficient.

Access to heating appliances (General Population Survey)

20% of respondents report a lack of heating appliances crucial for winter, such as electric heaters and solid fuel boilers



36% of IDPs report a lack of heating appliances

Top three oblasts with the highest ratio of respondents that report a lack of heating appliances

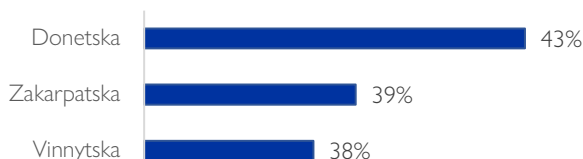


Access to solid fuel for heating (General Population Survey)

24% of respondents report a lack of solid fuel for heating

47% of those in rural areas report a lack of solid fuel for heating

Top three oblasts with the highest ratio of respondents that report a lack of solid fuel for heating



Access to energy storage and lighting solutions (General Population Survey)

39% of respondents report a lack of energy storage and lighting solutions, including power banks, generators, accumulators or goods for light



57% of IDPs report a lack of energy storage and lighting solutions

Top three oblasts with the highest ratio of respondents that report a lack of energy storage and lighting solutions



ADEQUATE HOUSING

KEY FINDING

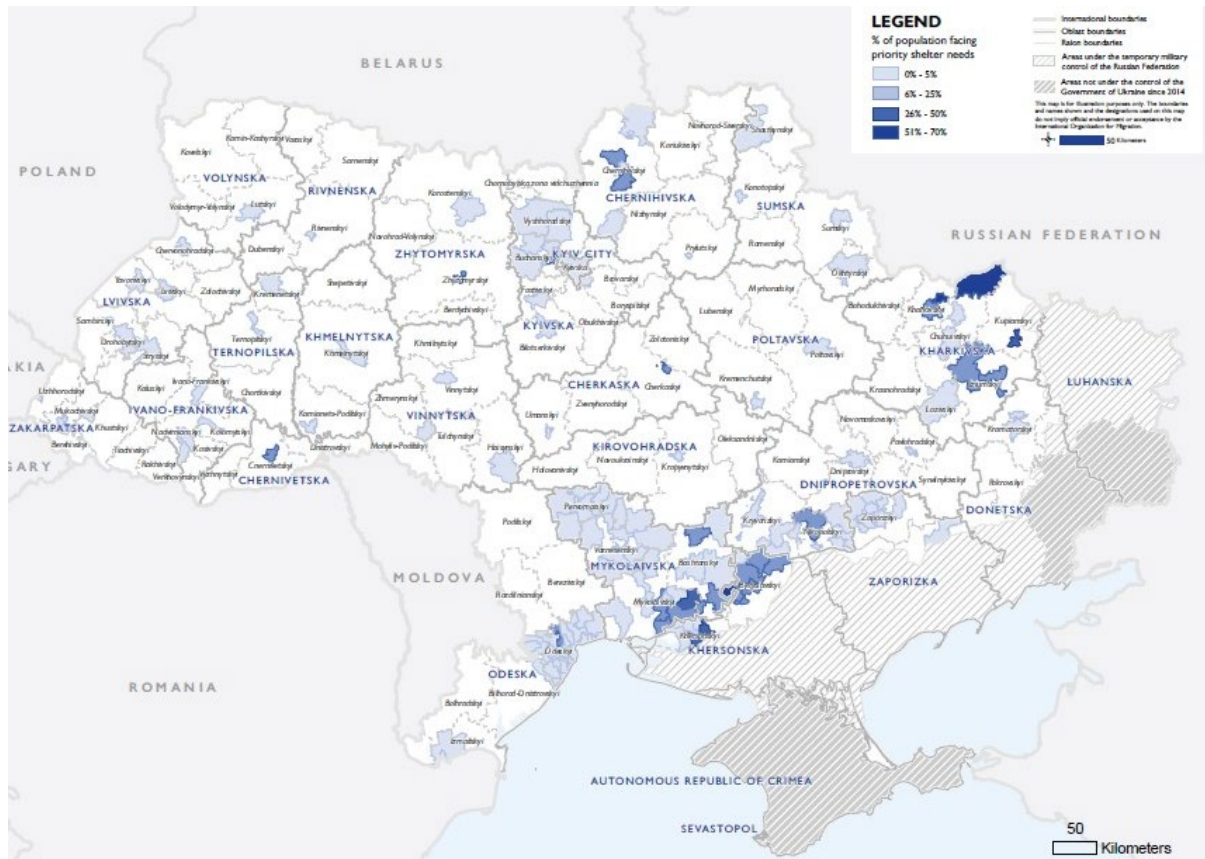
2 Despite a majority finding their housing adequate, the GPS data highlights a considerable need for structural and utility repairs to ensure winter readiness, coupled with the high demand for residential insulation cited by KIs in the SFA. In addition, certain groups, including IDPs in the South, report their housing adequacy at significantly lower levels.

The GPS data shows that a vast majority of the general population (93%) consider their current housing adequate for the winter period. However, among those respondents who consider their housing inadequate, there is a notable share that indicate the need for repairs or improvements in electricity grids (28%), gas and hot water pipelines (24%), roofs (33%), walls (44%), and windows (44%) to be prepared for the cold winter. Simultaneously, according to KIs interviewed in the Mobility and Needs Assessment round 2 (MaNA), only three per cent of the population in the assessed hromadas across the country do not have access to safe and adequate housing, understood as housing that is currently not damaged because of the war, is of sufficient size and is equipped

with heating and sanitary facilities. This suggests that while the overall sentiment towards housing adequacy is positive, there is a significant proportion of the population that requires attention to ensure proper winterization.

Housing adequacy for the winter period is perceived similarly across settlement types, with 93 per cent in rural settings considering their housing adequate for the winter period, compared to 94 per cent in large cities. Residents in Khersonska oblast were least likely to report adequate housing (85%). KIs in half of the 10 hromadas assessed in Khersonska oblast reported that 20 per cent or more of the population do not have access to safe and adequate housing.

Map 1: Proportion of the population with limited or no access to safe and adequate housing, by hromada (Mobility and Needs Assessment)



IDPs are least likely to report housing adequacy

IDPs are less likely to consider their housing adequate, with 86% reporting it as suitable. This rate is consistent across the West and East. The proportion of IDPs reporting adequate housing is lowest in the South (75%). At the same time, 91 per cent of returnees across the country reported their housing to be adequate.

Impact of the conflict on housing and the role of assistance programs for the affected population

At the national level, 14 per cent of respondents report owning a

house or apartment that was damaged or destroyed due to attacks or war post-February 2022. This figure is significantly higher in the East (23%) and South (20%), as well as among IDPs, with 47 per cent reporting such damage. Furthermore, when considering assistance received, 23 per cent of respondents at the national level report benefitting from support in the form of housing repairs, new housing, compensation, or other assistance. This support is notably higher among returnees, with 30 per cent reporting receiving assistance, and in the East, where 28 per cent report similar aid.

WINTER-RELATED NEEDS

KEY FINDING

3 The SFA and GPS data highlight the need for winter essentials, including bedding kits or blankets, warm clothing and heating appliances to prepare for electricity shortages and harsh winter conditions. IDPs are the most vulnerable population group, consistently reporting the highest levels of winter-related needs.

A significant proportion of GPS respondents anticipate the need to get essential winter items: **25 per cent require bedding kits or blankets, 41 per cent need warm clothing, and 20 per cent – heating appliances.** While 28 per cent are yet to secure raw materials for heating, rural residents show a higher need for these materials (52%), emphasizing the reliance on solid fuels in these areas. In contrast, in large cities, only 10 per cent of residents are yet to secure raw materials for heating. The situation differs across oblasts, as **over 50 per cent of respondents in Vinnytska, Zaporizka, Ternopil'ska, and Kherson'ska indicate the need to get winter clothes for the upcoming winter, along with 44 per cent of respondents in Kherson'ska reporting the need for bedding kits or blankets.** This is reflected in MaNA, wherein half of the 10 assessed hromadas in

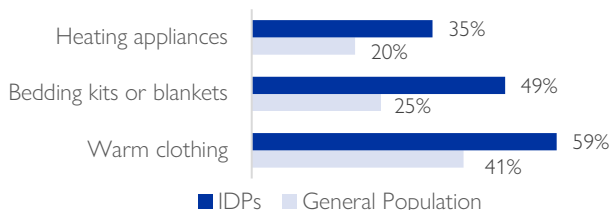
Kherson'ska, the proportion of the population estimated by KIs not having access to sufficient quantities of basic household items, including winter related goods, exceeded 20 per cent. As emphasized by a key informant in Myrivska hromada: *“there are concerns amongst the population of the upcoming winter season, for which residents are ill-prepared due to the dearth of winter goods”.*

The SFA findings validate the reported need for winter essentials in the GPS data. KIs report a high need for solid fuel heating appliances in both urban (59%) and rural (51%) areas, pointing to an overall heating concern. Moreover, 20 per cent of KIs in rural areas report winter clothing needs, compared to 11 per cent in urban areas.

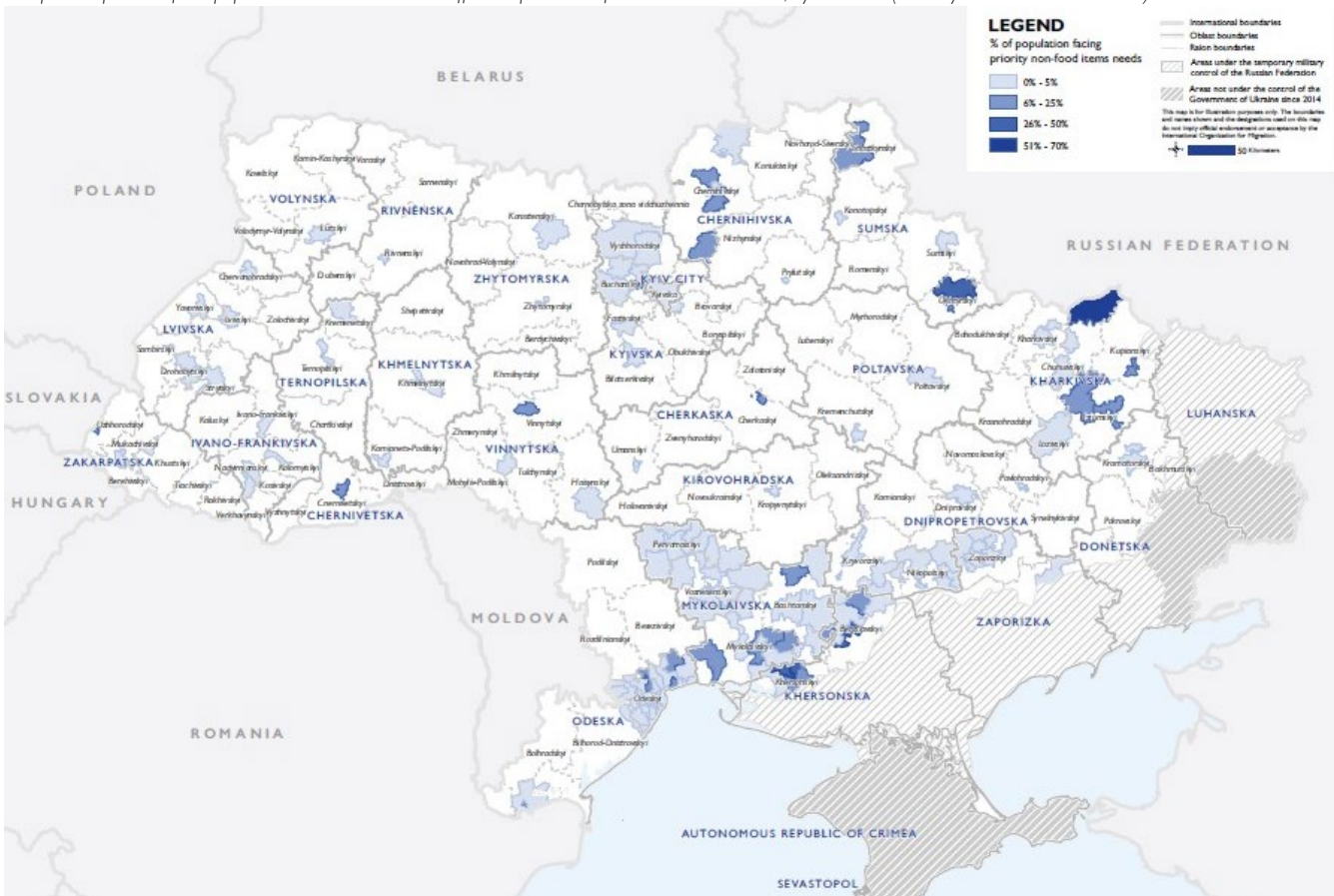
Winter-related needs are highest among IDPs

The highest share of winter-related needs is recorded among IDPs, with 59 per cent needing warm clothing, 49 per cent need bedding kits or blankets, and 35 per cent report the need for heating appliances. **Particularly affected are IDPs in Dnipropetrovska, Donetsk, and Ivano-Frankovska oblasts, where over 60 per cent report the need for warm clothing.** In Dnipropetrovska, Kyiv city, and Kharkiv'ska, over 40 per cent of IDPs report the need for bedding kits or blankets.

Proportion of individuals reporting the need for essential winter-related items (General Population Survey)



Map 2: Proportion of the population without access to sufficient quantities of basic household items, by hromada (Mobility and Needs Assessment)



ECONOMIC CONSTRAINTS AND PRIORITISATION OF NEEDS

KEY FINDING

4 Both the GPS data and the SFA data underscore the economic hardships that Ukrainians face in securing winter essentials. The majority are unable to afford necessary fuels and prioritize financial support to navigate the cold season..

The GPS data and the SFA both highlight the economic challenges faced by Ukrainians in preparing for winter. The GPS data shows that a substantial 61 per cent of respondents experience a lack of financial support, which resonates with the SFA findings of a widespread low payment capacity for solid fuels on top of access and availability issues. Rural areas demonstrate a higher percentage (65%) of respondents lacking financial support compared to large cities (57%). **Displaced populations are found to be the most vulnerable, as 74 per cent of IDPs report experiencing a lack of financial support.**

The situation is further strained as 67 per cent of those surveyed in the GPS study express that they are financially unable to secure the necessary solid fuels for the winter season. Particularly acute is the

challenge in oblasts such as Dnipropetrovska, Donetsk, Ivano-Frankivska, Kyivska, Kirovohradzka, Mykolayivska, Odeska, Poltavska, Kharkivska, Khersonska, and Khmelnytska, where more than 70 per cent of respondents report an inability to secure the necessary solid fuels for the winter season financially. This financial strain is acknowledged by key informant in Kirovohradzka:

“The payment capacity of the population is low, and it is expected that not everyone will be able to purchase solid fuel”.

51 per cent of KIs in urban areas in the SFA report a need for affordability of access to central heating lines, compared to 19 per cent of KIs in rural areas. At the same time, the need for access to a stable power supply is similar – it was reported by 53 per cent of KIs in urban areas and 52 per cent of KIs in rural areas.

61% of respondents report lack of financial support (cash)

67% of respondents report they are financially unable to secure the necessary solid fuels for the winter season

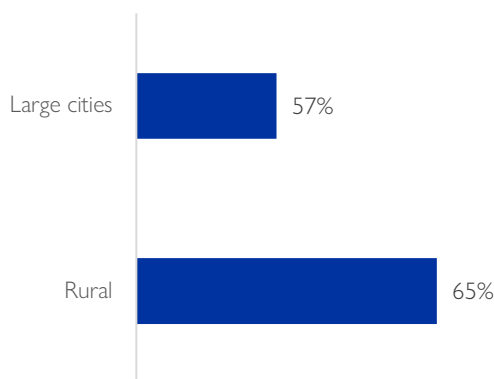


74% of IDPs report lack of financial support (cash)



58% of returnees report lack of financial support (cash)

Proportion of individuals that report the lack of financial support, by settlement type (General Population Survey)



Prioritisation of needs

The GPS data points to **cash or financial support as the most critical requirement for 45 per cent of respondents, followed by power banks or generators (13%) and the need for solid fuel for heating (11%)**. The proportion of respondents identifying these categories as the most critical varies by settlement type: in large cities, 15 per cent prioritize power banks or generators and only three per cent prioritize solid fuel for heating, while in rural areas, the figures are 11 per cent and 20 per cent, respectively. In principle, it reflects the immediate focus on securing resources that are fundamental to warmth and power throughout the winter, emphasizing the necessity for targeted financial support to address these concerns.

Proportion of individuals that report the following winterization need, by settlement type (General Population Survey)

