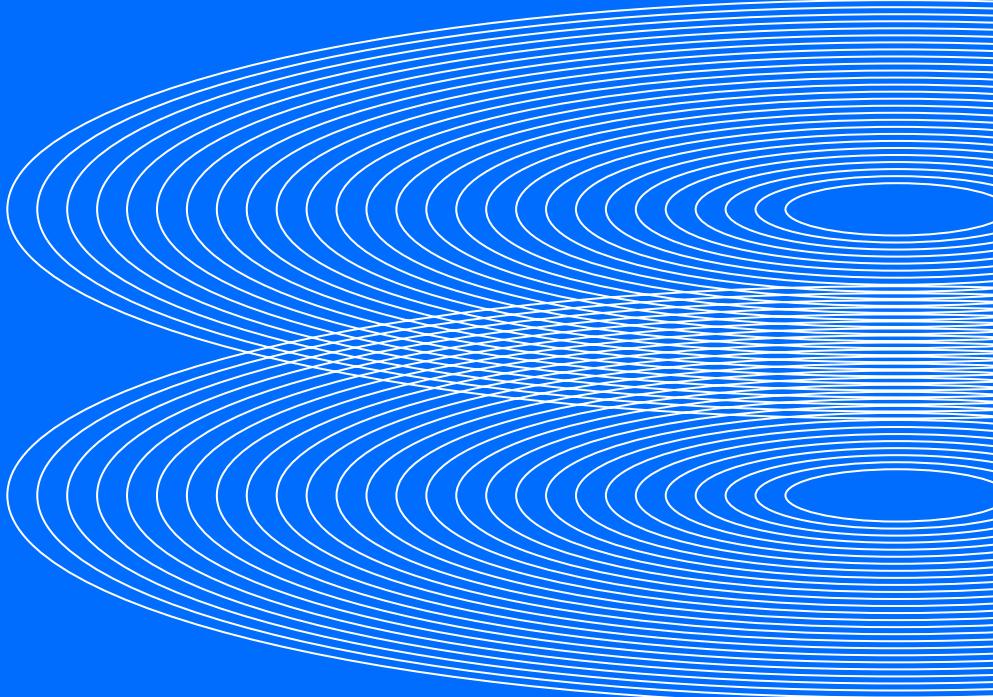


Ukraine's Global Perception Report 2022



BRAND UKRAINE

Ukraine's Global Perception Report is the first in its kind comprehensive analysis of Ukraine's perception abroad, which is based on unique data from leading international and Ukrainian research companies and contains practical recommendations for the development of Ukraine's nation brand and strategic communications. The report was developed by BRAND UKRAINE with expert support and in consultation with the Ministry of Foreign Affairs of Ukraine.

BRAND UKRAINE is a non-governmental organisation that brings together like-minded people and experts in strategic communications and international projects. The organisation helps develop a strong and sustainable brand of Ukraine in the world, form its positive image and agency by developing lovemark projects and campaigns, digital solutions, and analytical products.



This publication is funded by the European Union. Its contents are the sole responsibility of BRAND UKRAINE organisation and do not necessarily reflect the views of the European Union.

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Foreword from BRAND UKRAINE

In 2022 Ukraine certainly strengthened its national brand in the world. Ukraine's brave resistance against Russia's unprovoked aggression has significantly improved Ukraine's perception across the globe. Not only has its familiarity risen to an unprecedented level, but the global audience's perception of Ukraine as an influential international player has experienced a substantial increase. In a short period of time, Ukraine has undergone an unprecedented positive image change of global scale. All this was made possible by the People of Ukraine — the Armed Forces of Ukraine, the political leadership, and ordinary Ukrainians, united in their fight for freedom and democracy.

We believe that a strong nation brand is important for country's progress and development in the peaceful times — it drives tourism, trade, foreign investment and attracts talents. In the face of an existential threat, a strong nation brand becomes vital as it helps consolidate the world's support and solidarity with the people of Ukraine. A successful nation brand building is however impossible without a data-driven approach to policy development.

This report is the first in its kind attempt to summarise how the world viewed Ukraine throughout one particular year. It covers insights into how international media and people in social media have talked about Ukraine, the findings about the general public's attitudes toward Ukraine, and the country's performance in various nation brands' rankings and indexes in 2022.

Ukraine is no longer a blank page to the world. The extraordinary bravery of Ukrainians as well as the country's powerful strategic communication efforts have changed the perception of Ukraine globally. We have no doubt that, together with its partners' support, Ukraine will win the war. We know that Ukraine's image will keep strengthening over the coming years, and the world will learn about all the incredible things Ukraine can offer for the world - be it Diia, agro or military tech or our creative solutions and unique expertise in other areas.

We believe this report will contribute to the development of Ukraine's brand strategy by laying the baseline for further development of data-driven policy solutions. We believe it will be an important step in consolidating the efforts of the government, civil society, and experts in strengthening Ukraine's image abroad. After all, maintaining the positive trend of Ukraine's global perception,

which is given to us for the highest price paid by the Ukrainian nation, is the key to effective post-war recovery and rapid economic development of our country in the future. All this is the foundation of the future reconstruction of Ukraine, which will be converted after our victory into a boom in tourism, investments, and partnerships.

We hope the annual report on Ukraine's Global Perception will be of use to all the stakeholders who strengthen Ukraine's voice globally.

*Kind regards,
Maria Lypatska, Head of BRAND UKRAINE*

Acknowledgements

We would like to express our deepest gratitude to the Armed Forces of Ukraine for our freedom and their everyday heroism in defending Ukraine from the Russian tyranny, and to the People of Ukraine for being united and resilient in the most difficult times.

We want to thank the President of Ukraine, Verkhovna Rada of Ukraine, The Government of Ukraine, The Ministry of Foreign Affairs, and its Minister for their tireless everyday work on building a strong nation brand for Ukraine.

We highly appreciate the informational support provided by our friends and partners: the European Parliament, the Foreign, Commonwealth & Development Office of the United Kingdom (FCDO), The United States Agency for International Development (USAID), Bloom Consulting, Brand Finance, Ipsos, Let's Data, LOOQME, Zinc Network.

Finally, we are grateful to the European Union for the financial support.

List of Abbreviations

CEE	Central and Eastern Europe
EU	European Union
NATO	The North Atlantic Treaty Organisation
NGO	non-governmental organisation
p.p.	percentage point
UN	United Nations

Executive Summary

This report aims to summarise the key findings crucial for shaping Ukraine's image abroad in 2022 and to set a data-driven baseline for further Ukraine's nation brand development. It might be of interest to all the policy and decision makers dealing with Ukraine's strategic communications and nation brand building, experts from the civil society, academia, communications and creative specialists.

2022 was a turning point for Ukraine's image and perception worldwide. Its familiarity and reputation improved significantly across the globe.

It was undoubtedly the most challenging year for Ukraine in its modern history. Russia's full-scale invasion which started on February 24th put on hold peaceful life in Ukraine. Numerous cities were destroyed, thousands of civilians were killed, and millions of citizens were displaced. Still, Ukraine's unity, bravery, and resilience ruined Russia's plans to conquer Kyiv within days. Ukraine's determination to fight for democracy and common values impressed and inspired the world which resulted in significant improvement in the country's familiarity and public perception worldwide. Ukraine's familiarity score increased by over 40% globally [1] and half of the world's population agreed that the war in Ukraine has positively impacted their overall perception of the country [2].

This report covers the following measurements of international opinion on Ukraine:

- the image of Ukraine in international online news media and social media;
- an overview of the global audience's attitude toward Ukraine from a variety of sociological surveys;
- Ukraine's performance in international rankings and indexes.

The main findings from this analysis are set out here.

Ukraine has been in the spotlight of international media attention throughout 2022. The amount of coverage in international news publications and the level of social media buzz were unprecedented. Explosions caught in foreign journalists' live broadcasts from Kyiv, historic record for the 'Ukraine' search query on Google, Elon Musk's provocative and widely discussed tweets on the Russian war in Ukraine — all these

were just some of the highlights of 2022 in media for Ukraine. Although the country was mainly covered from a war perspective, the level of attention to particular war-related topics in news media somewhat differed from what people talked online. Thus, for example, the energy crisis issue, which was one of the largest topics in news media with 14% of all articles worldwide, got only 3% of people's posts and comments about Ukraine in social media. The key findings from the international news media monitoring and social media listening around Ukraine in 2022 can be found in the first section of this report.

The historic events of 2022 in Ukraine and their political significance sparked the researchers' interest in people's attitudes toward the war-related topic. International researches clearly illustrate that the world was closely following the news about Ukraine [6, 7, 8]. The war was the strongest association with Ukraine for the general public in many countries [33]. **71% of the world population supported Ukraine in the war [2]. The war increased positive overall perceptions of the country**, influencing the perception of Ukraine's sense of community, history, people, and culture the most [2]. Various surveys have captured the world's strong support of temporarily displaced Ukrainians and people's willingness to welcome them in their own countries.

Global perceptions of a country's political leaders are an important component in nation brand building, and **international audiences have been very favourable to Ukraine's President, Volodymyr Zelenskyy, paying tribute to his efforts in leading the country to victory**. The proportions of respondents who want Ukraine to be a future member of the EU and NATO also hit the highest scores to date in 2022. Across Europe, an average of 66% of people were ready to welcome Ukraine into the EU [3].

Although global audiences in general demonstrated a high level of support for Ukraine, there were some important differences in attitudes from a regional perspective. Thus, for instance, **the share of Russia-supporters and those holding a neutral position was highest in the Global South countries** where research took place [2]. Considering the significance of the Global South region in the process of Ukraine's image-building globally, we have dedicated a separate paragraph to the results of the commissioned sociological study conducted for the Ministry of Foreign Affairs of Ukraine in seven countries of this region. More information on the global audience's perception of Ukraine can be found in the second section of this report.

The globally recognised international comparison of countries'

performance in the form of indexes and rankings is an important part of the nation brand assessment. The economic damage that Ukraine experienced from the Russian invasion of its territory consequentially led to a drop in performance in many tangible spheres. Thus, for example, **the country's brand value**, which is based on brand-related GDP streams, **has decreased by 21%** [4]. While the intangible changes will be mostly seen in the next year's index and rankings editions, some significant changes have already been captured in 2022, e.g., **Ukraine's influence**, measured as a perceived impact that a country has on other countries, **going up to 44% in 2022 from 36% a year before** [5]. Some of the comparison dimensions, valuable in peaceful times, do not help evaluate a country during the war. Therefore, we deliberately avoid analysing Ukraine's 2022 results in business, environmental sustainability, and other important areas, while continuing hostilities on its territory keep causing significant damage in these spheres. The analysis of Ukraine's performance in the most acknowledged international rankings and indexes that measure nation brand perceptions can be found in the final section of this report.

Conclusions

“Character is like a tree and reputation like a shadow. The shadow is what we think of it; the tree is the real thing”. These words once said by Abraham Lincoln describe aptly what Ukraine has demonstrated to the whole world since the 24th of February, 2022. Ukraine’s spirit of freedom, bravery, resilience, and society’s cohesion is that tree, and the shadow is what became the subject of this analysis.

This report summarises how the world viewed Ukraine during one particular year and lays a foundation for further policy-based and data-driven nation brand development. Big upheavals bring big opportunities, and those, in turn, bear the new challenges. Here are some of the opportunities and challenges we would like to outline for the next year for all the stakeholders working on Ukraine’s image and reputation abroad.

1. Russia’s full-scale invasion of Ukraine and its political and economic significance for the world sparked interest in the country and raised awareness to the highest level in modern history before gradually decreasing.

To maintain global attention and solidarity, Ukraine should adopt a more coherent and focused approach and have a nation brand strategy in place. The key objectives for all the stakeholders of this strategy to convert the raised awareness into deeper knowledge about Ukraine’s culture, history, and economic potential building a bridge towards post-war recovery and future investments in a well-coordinated manner engaging all respective government institutions and civil society organisations.

The data collected for this report could serve as a baseline for further data-driven solutions in foreign policy and strategic communications.

2. High media attention to Ukraine is a great opportunity for its image building, but it is important to transform the event-driven media coverage into a strategic long-term partnership with the key media players in different regions of the world. This approach will ensure that Ukraine’s voice in the world is powerful and has an agency. As unveiled in the first section of this report, the mentions of Ukraine in the media in 2022 had a higher correlation with the concept of nuclear threat rather than heroism or freedom.

The major part of the publications about Ukraine in international news and social media in 2022 focused on the military developments and the situation on the battlefield, followed by international support, temporarily displaced Ukrainians and energy crisis. There is a clear window of opportunities for Ukraine to increase its share of voice in the global media agenda and promote Ukraine's policy solutions and narratives, such as Ukrainian Peace Formula or Grain from Ukraine initiative. Coordinated communication of these solutions should be reflected in the distribution of key Ukraine-related topics in the foreign media, thus more proactively influencing a global opinion.

3.

Ukraine's nation brand strategy should include well-developed key performance indicators and an evaluation system. They should become an integral part of the national brand development strategy and the future editions of the Global Perception Report. Ukraine's comprehensive reputation tracker including global perception annual survey in priority countries should be designed and put in place, considering the brand KPIs.

4.

The process of Ukraine's nation brand building should be based on a deep understanding of the regional cultural and political differences. Although the difference between the perception of Ukraine in the Global North and Global South was not the core focus of this report, some of the findings clearly demonstrate that there cannot be a unified approach to Ukraine's brand development globally and more efforts should be invested into Ukraine's strategic communications in the Global South countries. Improving Ukraine's perception implies thorough research on the local peculiarities of the media sphere, public opinion, and political culture. It is also crucial to invest in expanding the people-to-people contacts between Ukraine and other countries since the level of knowledge and familiarity with the country drives the attitude, support, and partnership.

5.

The topic of Ukraine's post-war reconstruction was not prominently communicated in foreign media in 2022. Although the war is still in its active phase, it is important to start discussing the reconstruction plans and ensure that they are based on Ukraine's vision of its future development. Ukraine's agency in the topic of post-war development is one of the key priorities for the country's strategic communication in 2023.

6.

Despite quite a strong association of Ukraine with a fight for freedom and the liberal values, the presence of the country's brand attributes in foreign media was quite low in 2022 (about 8% of all publications about Ukraine in the major online media). Promoting important brand-building attributes becomes even more challenging considering the inevitable decrease in media attention. This challenge should be addressed in Ukraine's brand strategy as coordinated policy solutions, actively supported on all possible levels — from the political leadership to the voice of civil society.

More detailed information on the measurements of international opinion on Ukraine can be found in the next three sections of this report.

Ukraine in International News and Social Media

News media and social media are factors that help to define any country's image. They are crucial for building general awareness of the country, as well as for popularising specific brand attributes. In 2022, Ukraine was the top story in the world's major media for quite a long period, and even when initial interest fell, coverage remained high. The buzz in social media was so loud that the most famous public figures considered it right to post their own opinion on the topic.

The incredible amount of information in media and social media, on the one hand, provides remarkable opportunities for content analysis. On the other hand, it imposes certain challenges, connected with big data processing. With the aim of media and social media analysis, BRAND UKRAINE collaborated with LOOQME, the media monitoring agency based in Ukraine. The database included LOOQME's own data and additional data from global providers to ensure the fullest coverage, resulting in more than 500 million mentions of Ukraine in news and social media, covering in total 192 countries in North and Latin America, Europe, Africa, Asia, and Australia (with the exception of Ukraine, Russia, and Belarus). The amount of mentions, and diverse range of languages and sources placed some restrictions on the accuracy of data processing and interpretation. In order to define the key subjects each month of the year, we analysed the media publications and social media posts with the largest audience that were published in the peak periods of the month. Machine tools were used to define the most popular/trending words, terms and personalities, and translation of texts to English was conducted by machine methods. Nevertheless, the report gives a useful general overview of the existing trends. Further deeper research into the regional, cultural and/or political peculiarities in news and social media coverage is out of scope of this report. In 2023, there will be a greater focus on analysis of priority countries and regions.

Ukraine in news media

The content analysis of Ukraine's mentions in news media was performed on the basis of almost 51 million publications in international online media covering 184 countries.

Over the year, the peak of publications on Ukraine in the news media was in late February — early March 2022.

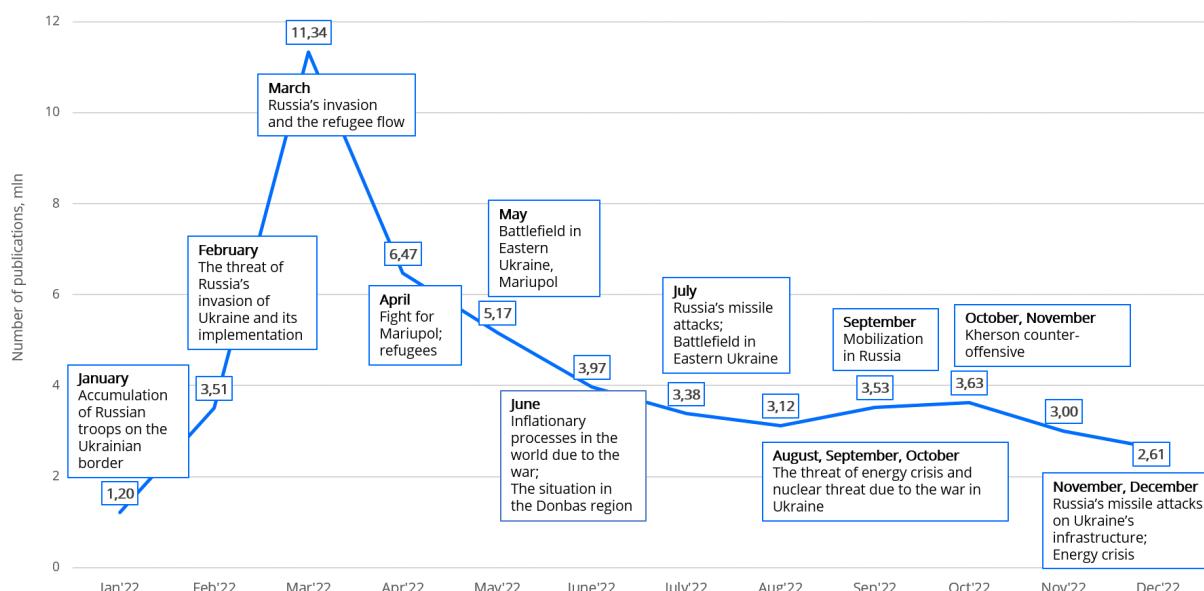


Figure 1: The dynamics of publications and key topics about Ukraine in international news media in 2022.

Source: media monitoring research conducted by LOOQME for BRAND UKRAINE, January-December 2022

While 2022 content about Ukraine mostly covered the war, there were specific topics that gained the largest media attention. The largest share of articles was about hostilities, Russia's war crimes, and threats to world security due to Russian aggression (41% of all articles). 16% of news media content was about international support and aid to Ukraine. The third largest topic, with a 14% share of voice, was the energy crisis, gaining more coverage after Russia launched a number of missile and drone attacks on Ukraine's energy infrastructure. 8% of all publications regarded the issue of displaced Ukrainians and their lives abroad.

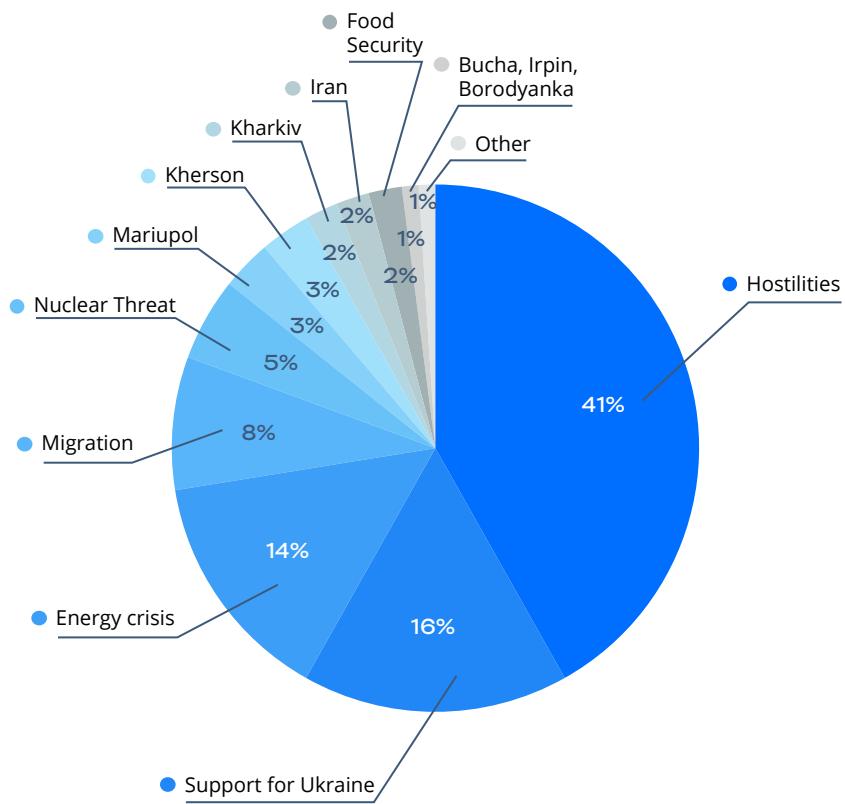


Figure 2: Different subject's popularity in terms of the share of all articles about Ukraine in international news media in 2022.

Source: media monitoring research conducted by LOOQME for BRAND UKRAINE, January-December 2022

Ukraine in social media

Social media listening analysis presents a number of methodological limitations and technical challenges of collecting the data. Due to the technical restrictions of the major social media platforms, the analysis performed for this report is 87% based on Twitter posts. Other social media platforms, analysed for the purpose of the research, include Reddit, Facebook, YouTube, Instagram, Tumblr, blogs and forums.

The social media analysis was conducted on the base of 453 million mentions, including posts, reposts, and comments covering 192 countries. After a very large spike in mentions in March, there was a second smaller spike in October caused mainly by the news about a massive missile strike on Ukraine's energy infrastructure.

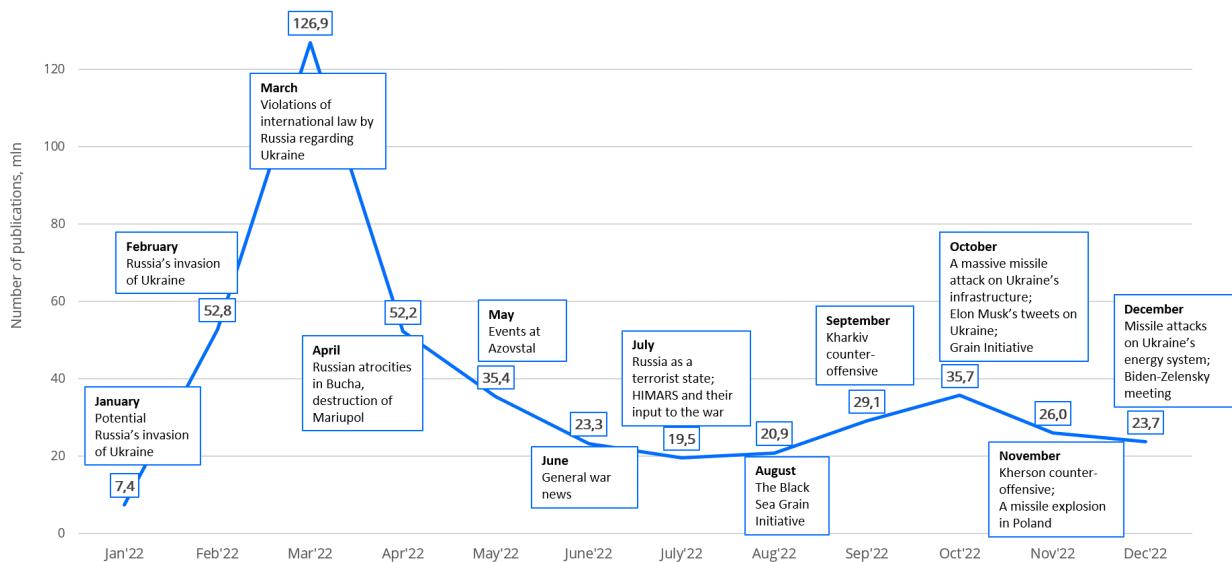


Figure 3: The dynamics of publications and key topics about Ukraine in social media in 2022.

Source: media monitoring research conducted by LOOQME for BRAND UKRAINE, January-December 2022

Compared to a variety of topics discussed in the news media articles, people in social media were more focused on hostilities, with this topic occupying 63% of all mentions. International aid and support to Ukraine was the second largest topic, with a 10% share of voice. The energy crisis, which was the third largest topic in news media, was far less discussed in social media (only 3% of all mentions).

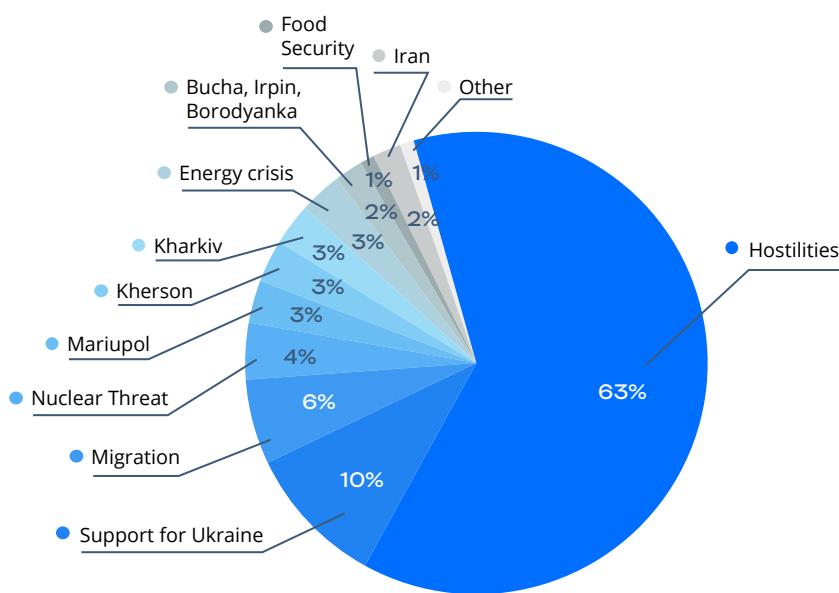


Figure 4: Different subject's popularity in terms of the share of all publications about Ukraine in social media in 2022.

Source: media monitoring research conducted by LOOQME for BRAND UKRAINE, January-December 2022

It is particularly valuable to analyse how the 'Ukraine' topic was depicted on social media platforms intended for public discussions, such as Reddit and forums. Among all the topics around Ukraine in social media in 2022, the issue of nuclear threat and energy crisis stood out in terms of the share of content on Reddit and forums within the overall amount of the topics' content.

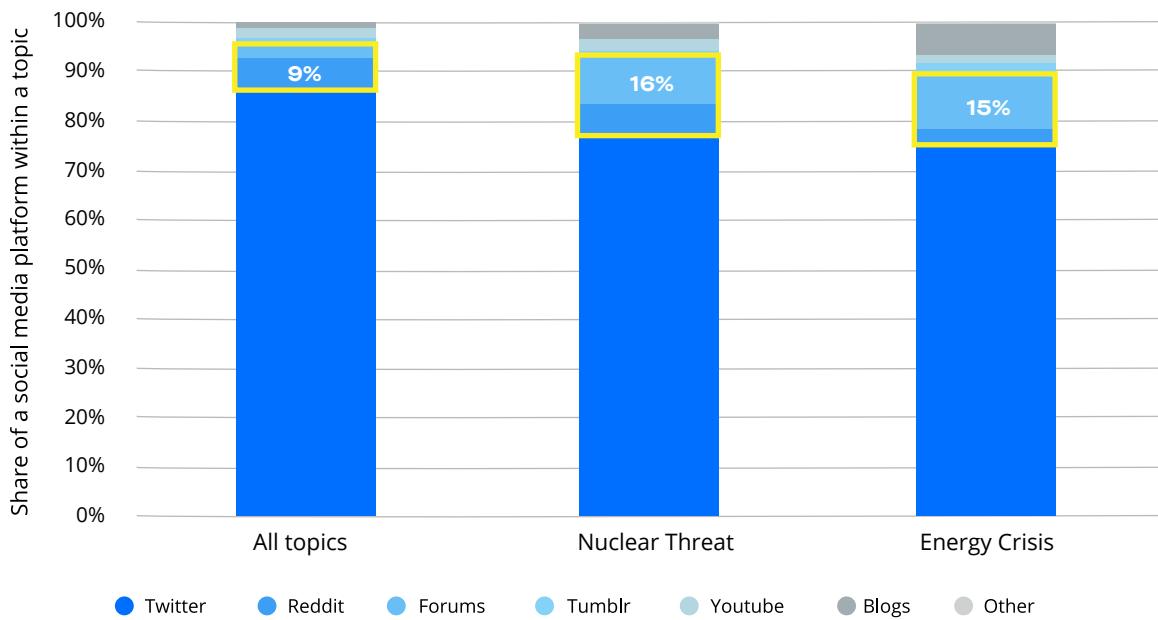


Figure 5: Share of voice of different social media platform within particular topics around Ukraine in 2022.

Source: media monitoring research conducted by LOOQME for BRAND UKRAINE, January-December 2022

Ukraine on Google

In 2022, the keyword 'Ukraine' hit an all-time record on Google in terms of the number of searches, globally. The world's search interest in Ukraine was 20 times higher than in 2012 when Ukraine hosted the UEFA European Championship, and 7 times higher than in 2014 when Russia invaded Ukraine and occupied the Crimean Peninsula and parts of Donetsk and Luhansk regions.



Figure 6: The dynamics of Google trend score for the 'Ukraine' keyword, worldwide, 2004–2022.

Source: Google trend

Similar to the dynamics of the number of publications in news media and social media, the peak of search activity was in late February and early March. After a tremendous spike, the search interest stabilized on a moderate level, going up during the critical moments of the war.

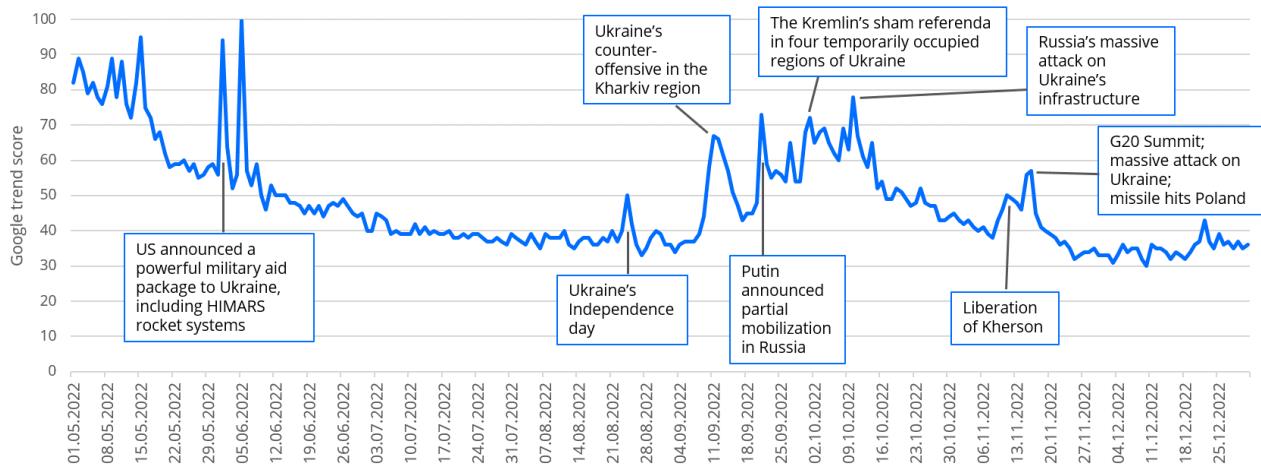


Figure 7: The dynamics of Google trend score for the 'Ukraine' keyword, worldwide, May-December, 2022.

Source: Google trend

Among the most trending topics on Google regarding Ukraine was the question of why Russia invaded Ukraine. The search queries about the winner in the Russia-Ukraine war were generally worded in a way that was more sympathetic to Ukraine: 'did Ukraine win the war', 'is Russia losing the war', 'Russia retreating from Ukraine', and 'Russia losing war' were the most trending queries. Within searches for Ukraine, Volodymyr Zelenskyy was the most searched for public figure.

Ukraine's brand attributes in media

Media can play a significant role in popularising brand attributes, and nations as brands are not an exception. Therefore, along with media monitoring that gives an understanding of the variety of topics in general, it is also important to analyse the context of the texts and try to find meaningful correlations with the pre-defined brand attributes and relevant concepts.

The text analysis, performed by the LOOQME media monitoring agency for BRAND UKRAINE on the basis of almost 6 million mentions of Ukraine in the world's most significant media, allowed to discover and compare the correlations between Ukraine and key topics which could significantly affect

the perception. Despite the considerable amount of content paying tribute to the Armed Forces of Ukraine and admiring the resilience of Ukrainian people, the concept of 'nuclear threat' was most closely associated with 'Ukraine' among the chosen list of words and phrases in 2022. The concepts of 'freedom' and 'hunger' also strongly correlated with the word 'Ukraine' over the year.

date [Month]	freedom	heroism	hunger	nuclear	refugee	recon- struction	The average value		
							freedom	heroism	hunger
December	0.16	0.19	0.18	0.24	0.1	0.02	0.13	0.1	0.12
November	0.18	0.14	0.18	0.27	0.09	0.04			
October	0.11	0.12	0.15	0.28	0.02	-0.03			
September	0.13	0.07	0.12	0.2	0.04	-0.04			
August	0.17	0.17	0.15	0.24	0.07	0.03			
July	0.12	0.11	0.11	0.2	0.06	0.01			
June	0.07	0.06	0.04	0.17	0.09	-0			
May	0.04	0.04	-0.03	0.15	0.12	-0.06			
April	0.07	0.07	0.07	0.13	0.04	-0			
March	0.07	0.04	0.07	0.17	0.07	0			
February	0.06	-0.09	-0.03	0.14	0.1	-0.07			
January	0.23	0.08	0.17	0.22	0.22	-0.1			

Figure 8: The level of correlation between the term 'Ukraine' and the list of chosen concepts in a set of media publications about Ukraine in the world's major online media in 2022.

Source: media content analysis conducted by LOOQME for BRAND UKRAINE, January–December 2022

The next step of the analysis was to define a set of reputational attributes — persistent characteristics of Ukraine's brand — to be periodically measured in foreign media. The list of such attributes and possible wording options was developed in a range of discussions with communication specialists and decision makers who work for Ukraine's image building (see Appendix A). The list of attributes may be adjusted in the future in order to be relevant to Ukraine's brand strategy. The attributes were found in 8% of the total amount of publications. According to the results, the two most popular characteristics of Ukraine in 2022 were 'The nation of heroes' and 'Democratic country', together holding almost half of the publications that contained reputational attributes. 'The Member of the European Family' attribute got a 17% share of voice, being the third most widely spread characteristic of Ukraine in the media.

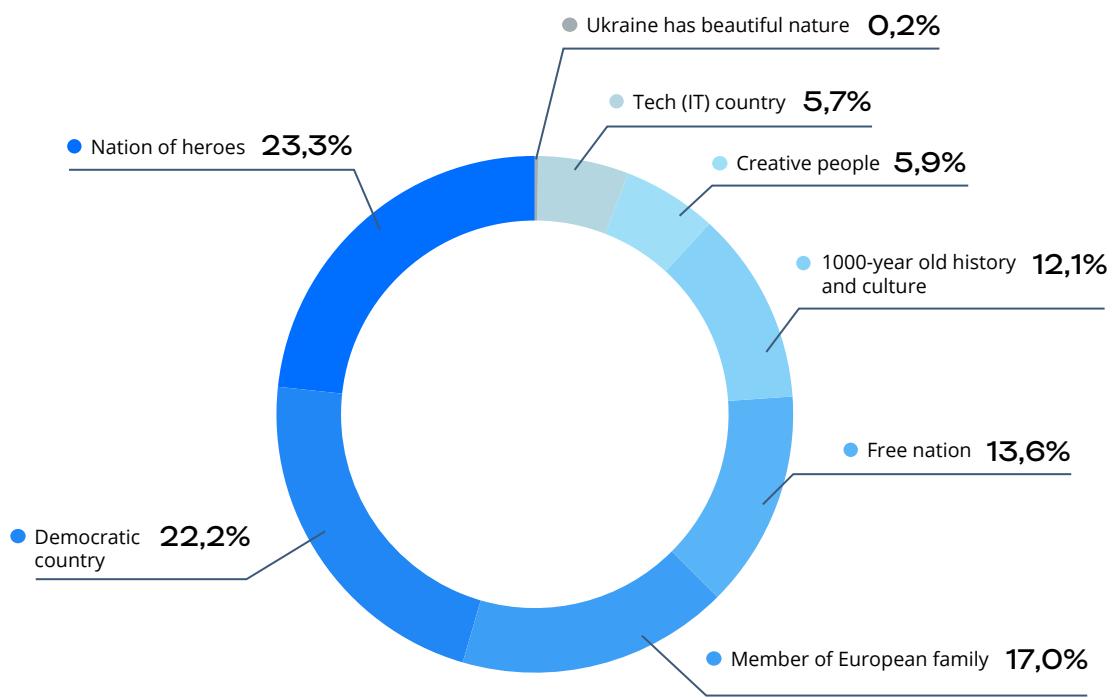


Figure 9: Presence of Ukraine's brand attributes in a set of media publications about Ukraine in the world's major online media in 2022.

Source: media content analysis conducted by LOOQME for BRAND UKRAINE, January–December 2022

The Global Public's Perception of Ukraine

The unprovoked full-scale Russian invasion of Ukraine in 2022 was condemned by the majority of countries in the world with the UN General Assembly overwhelmingly adopting a resolution that reaffirmed Ukrainian sovereignty in March 2022. As a result, political leaders of the world's major nations united into a powerful political and military coalition around Ukraine, while ordinary people demonstrated solidarity with Ukrainian society. In fact, the unprecedented military, economic and humanitarian aid to Ukraine would not have been possible without the general public's support of their political leaders' actions.

Ukraine, Ukrainians, and the war were at the center of attention among sociologists and researchers worldwide in 2022. The number of studies on Ukraine has broken all records. The diversity of analysed topics allowed us to make general conclusions on the global public's perception of Ukraine in 2022. Aiming to provide an unbiased analysis that would truly represent the world, not only the Western agenda, the research surveys presented in this section of the report cover public opinion in both Global North and Global South.

The methodology used in this section is based on results from accredited publicly available research surveys as the war and time limits made it impossible for us to carry out our own research. However, this remains a priority for BRAND UKRAINE in the next year's edition of the report. The sources covered in this section include Eurobarometer, YouGov, Pew Research Center, GLOBSEC, and other. We are deeply grateful to our partners and friends for providing the results of their research for this report — Brand Finance, the European Parliament, Zinc Network, Bloom Consulting and Ipsos.

Global attention towards Ukraine

The war in Ukraine was in the focus of attention of the world media and its audience. According to the research conducted in March 2022 in 7 European countries and the USA, only 4% of the population was not familiar with the current situation in Ukraine at all, with 40% reading and talking about it every day [6]. According to another survey from spring 2022, 81% of the population in Germany, 72% in Poland, 70% in the UK, and 69% in the USA said they were following the news about the war in Ukraine closely [7]. Over 75% of the USA, UK, and EU respondents were following information about the war in Ukraine through social media [8].

Even though general attention started to decrease after a tremendous rise during the first months of Russia's full-scale invasion of Ukraine, it was still high in late 2022. In September, 53% of the population in the UK kept following the news closely [9], and 79% of Latvian residents followed the information about the war at least once a day [10].

High interest in the news from Ukraine is also linked to the general belief that what's happening there could impact lives of people worldwide. By the end of the year, 81% of Europeans were worried about the spread of the war in Ukraine to others countries [13].

In CEE countries, the majority of the population recognises that by fighting against the Russian invasion, Ukraine is also fighting for democracy in Europe (figure 10) [11]:

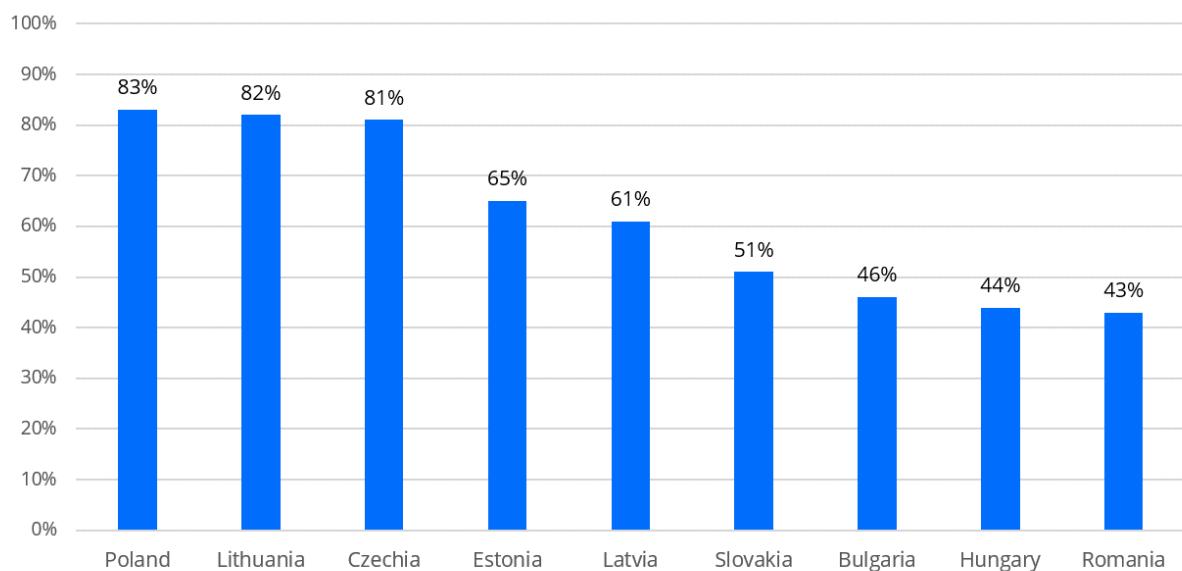


Figure 10: Public's opinion on the statement "By fighting against the Russian invasion, Ukraine is also fighting for democracy in Europe" (share of respondents who totally or somewhat agree).

Source: GLOBSEC Trends 2022

A shift in the overall perception of Ukraine due to the war

A tremendous rise in interest in a country which was formerly almost unknown to millions of people in the world, could not leave its global image unchanged. The Bloom Consulting company conducted special global research in the spring of 2022 to evaluate how the Russia's war in Ukraine was impacting Ukraine's and Russia's nation brands. Neither Ukrainian nor Russian citizens were included in the study. According to its results [2], 71% of the world

population were Ukraine's supporters (while 8% had no opinion). 54% of global citizens claimed that the war has positively impacted their perception of Ukraine as a country, while 23% had no clear opinion.

The research has captured a significant difference in the change of perception between the Global North and Global South. While around 80% of the population in Europe and North America claimed they supported Ukraine and roughly 15% had a neutral position, the support for Russia and neutrality were higher in the countries of the Middle East, Africa, Asia, and Latin America — 25% and 15% on average, respectively. The highest positive impact on Ukraine's perception was recorded in North America (64%) and Europe (60%), and the lowest — in Latin America and the Middle East (less than 50%).

The war had the most positive impact on the world's perception of Ukraine's sense of community, followed by the country's culture, people & history, and integration & inclusion (figure 11).

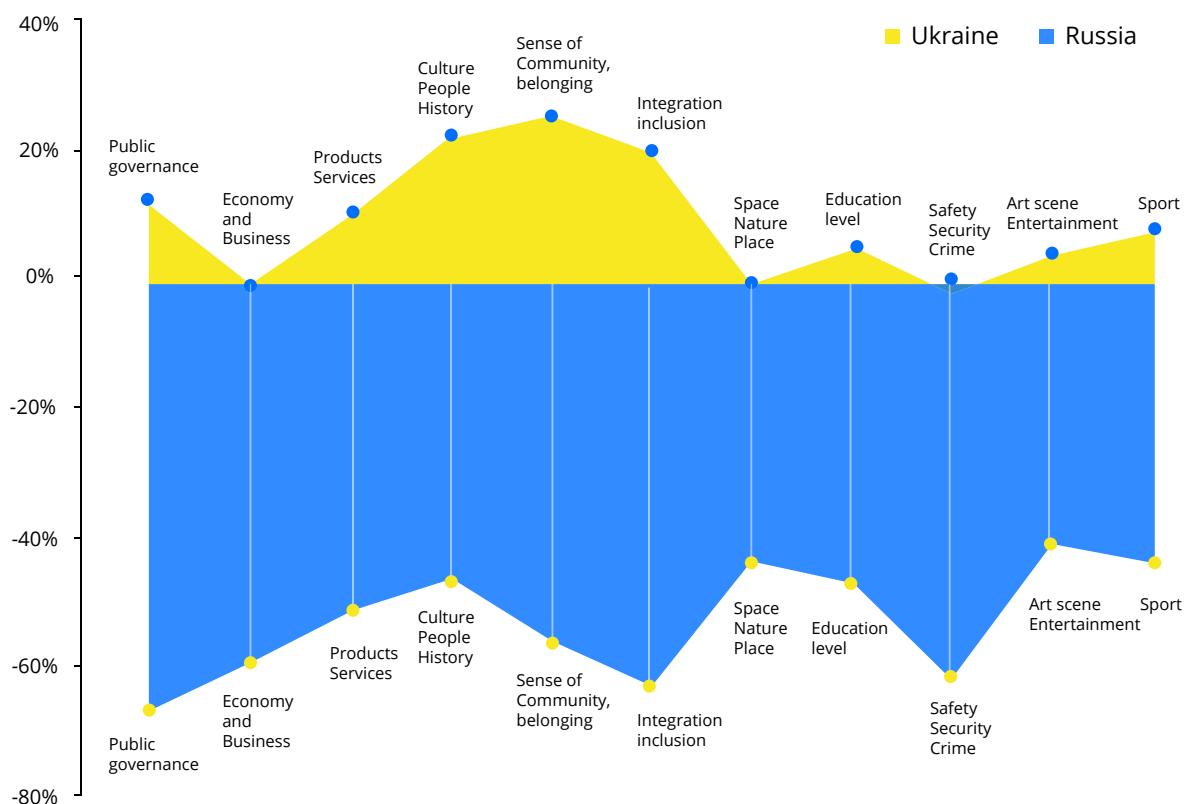


Figure 11: How the war affected specific types of perceptions of Russia and Ukraine.

Source: Bloom Consulting

The seismic changes in Ukraine's positive perception that happened at the very beginning of Russia's full-scale invasion inevitably show a natural tendency to a moderate decrease after several months. For instance,

according to a French national poll, share of the French population that had a positive opinion on Ukraine in December 2022 dropped to 69% from 82% in March 2022 [12]. This fact should be taken into account in future, with political, diplomatic and communication strategies being used to slow the drop in awareness and positive perceptions, converting them where possible into an interest to new topics and angles on Ukraine. However, the approach to future Ukraine's image building needs to be defined in cross-government cooperation and one-voice policy in external communications.

Attitude toward Ukrainian temporarily displaced persons and humanitarian aid

Perhaps, one of the key issues which identifies the attitude of people towards Ukraine and the Ukrainian nation is the level of willingness to welcome temporarily displaced Ukrainians in their own countries. The war in Ukraine is believed to have created the largest refugee migration in Europe since World War II. As of November 15, 2022, the U.N. High Commissioner for Refugees (UNHCR) reported that more than 7.8 million Ukrainians had fled hostilities in Ukraine [14]. Although the challenges of accepting and accommodating them are huge and increasing with the deterioration of the global economy, the willingness to welcome Ukrainians was very well pronounced by most of the countries throughout the whole year 2022.

Different surveys demonstrated a high level of tolerance towards Ukrainian temporarily displaced people and willingness to help them at the beginning of the full-scale war in 2022. There was a clear consensus among EU citizens in favour of the idea of welcoming Ukrainians fleeing the war (88%) [15]. 2 out of 3 Europeans were willing to help Ukrainians by collecting funds, food, and clothes, and preparing apartments for them [6].

A survey covering ten EU Member States showed that a large majority of Europeans were still in favor of taking in temporarily displaced Ukrainians in October 2022. Moreover, 40% of the EU population were ready to continue support for Ukraine, even at the cost of negative economic and social consequences [16].

General humanitarian help to Ukraine was highly supported throughout the whole year 2022. Surveys conducted in May and September revealed that the absolute majority of Europeans approve providing humanitarian support to the people affected by the war (93% [16] and 92% [17]).

Attitude toward Ukraine's political leaders

Political leaders play a huge role in building a country's image. Their importance in nation branding is even higher in turbulent times, as the global audience is often judging the country on their leaders' ability to overcome difficulties and bring their people to prosperity.

Since the start of the full-scale war in Ukraine, its President Volodymyr Zelenskyy has gained a strong support of the general public in many societies. In March people in CEE countries rated President Zelenskyy more highly than any other world leader, with 66% of the population viewing him positively [11]. At the same time, 7 out of 10 Americans (72%) were confident in Ukraine's President to do the right thing regarding world affairs, higher than any other international leader recorded [18].

Volodymyr Zelenskyy remains the most popular foreign politician for Americans and the #2 for the UK citizens as of the 3rd quarter of 2022 [22, 23].

The European Parliament awarded "the brave people of Ukraine, represented by their president, elected leaders and civil society" the 2022 Sakharov Prize for Freedom of Thought, a prize awarded each year by the European Parliament which recognizes individuals and organizations defending human rights and fundamental freedoms.

In December 2022, Volodymyr Zelenskyy, alongside 'the spirit of Ukraine', was named the Time magazines' person of the year in recognition of his leadership during country's fight against Russia's invasion. In POLITICO's ranking of people driving European politics and policy, Ukraine's President was placed at the top as 'a politician who is redefining what it means to be European' [24].



Ukraine as a future member of EU/NATO

A clear majority of people in Ukraine agree integration into the EU and NATO is crucial for the country's future development and security. In August 2022, 85% of Ukrainians wanted Ukraine to become a member of the EU and 69% wanted it to join NATO by 2030, as opposed to only 41% and 33% respectively in December 2021 [25]. In October 2022, 86% of the Ukrainian population said they would support Ukraine's accession to the European Union [26]. Russia's unprovoked aggression has resulted not only in consolidating the people of Ukraine in terms of their vision of the country's future, but also helped in forming a welcoming atmosphere for Ukraine in most of the world's capitals.

In March 2022, more than half of Europeans believe that Ukraine should be admitted to the EU sooner or later [27]. Across 14 leading countries 63% of the population agreed that Ukraine should be offered EU membership, and 58% NATO membership [28] (figure 12). Support was generally higher in Europe.

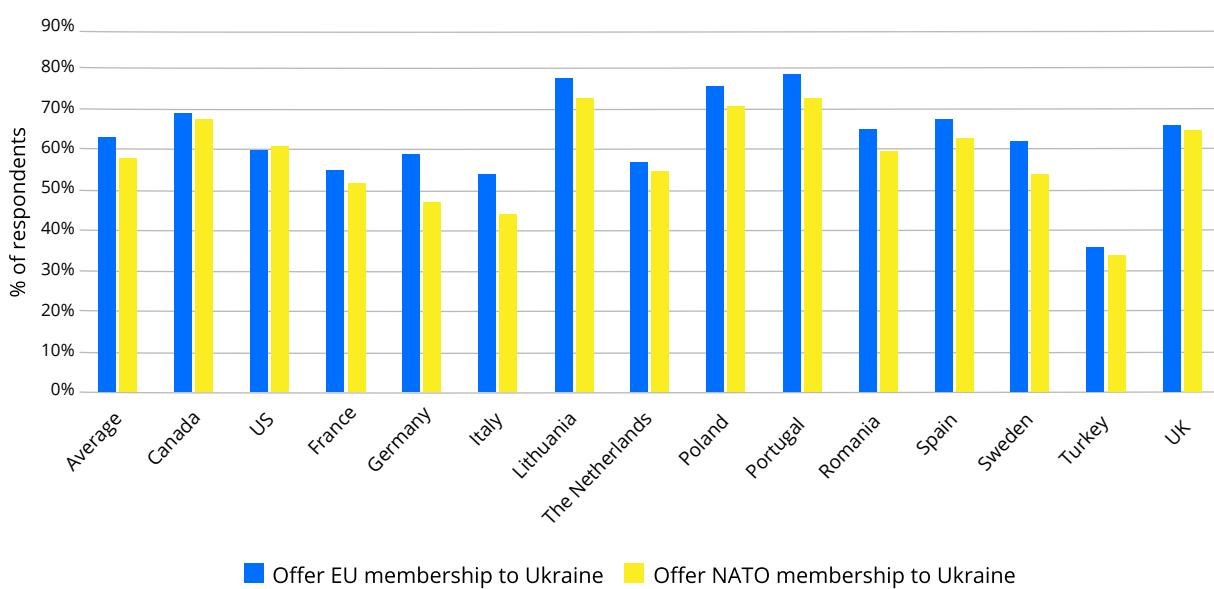


Figure 12: Public opinion on the actions to react to the war in Ukraine (share of respondents who totally or somewhat agree).

Source: Transatlantic Trends 2022, GMF

While over 70% of Poles supported Ukrainian membership of the EU in June [29], this figure rose to as high as 88% by September [30]. By October, 66% of Europeans on average were ready to welcome Ukraine into the EU [3].

Views of Ukraine in Global South countries

While overall support for Ukraine was high globally in 2022, some regions of the world were more pro-Ukrainian than others. The countries of the Global South have historically been less connected to Ukraine than Western societies. Research conducted by the Zinc Network for Ukraine's Ministry of Foreign Affairs in 2022 measured people's opinions about the war in Ukraine in seven Global South countries (China, India, Indonesia, Kazakhstan, Morocco, Turkey, and UAE).

34% of people surveyed had a clear pro-Ukrainian position, with a further 46% being neutral to Ukraine or Russia, and the rest 20% positive to Russia. The highest share of Ukraine's sympathisers was recorded in Morocco (48%) and Turkey (43%). China had the lowest pro-Ukrainian position (17%), but the largest segment of neutral audience (56%).

When asked to describe Ukraine in three words, people in the surveyed countries used the word “war” most often (figure 13).

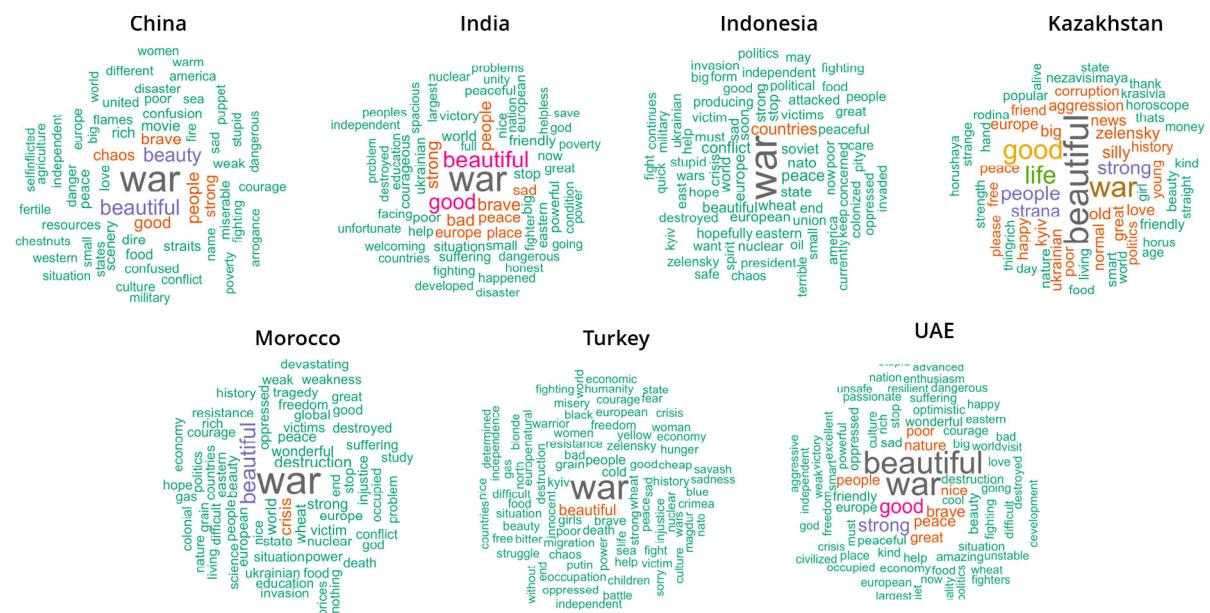


Figure 13: Associations with Ukraine among general public in seven countries of the Global South.

Source: Research conducted by the Zinc Network for Ukraine's Ministry of Foreign Affairs in seven countries of Global South, 2022

The public audience in the surveyed countries was generally well-informed about the war in Ukraine (61%), but far less familiar with the country itself (only 31% said they were familiar with Ukraine's culture, 35% with its politics, and 31% with its history).

In general, the image of Ukraine as a brave and democratic country was moderately popular in the surveyed countries of the Global South. Thus, 38% of the respondents agreed with the statement that 'Ukraine is fighting for freedom, democracy, and sovereignty' (46% in Turkey, 45% in India, and 44% in UAE). For 32% of the audience, 'the war has shown that Ukrainians are some of the bravest, most inventive, and most determined people in the world' (43% in India and 42% in UAE).

Ukraine in International Rankings and Indexes

Although international comparison is essential to any country's brand image analysis, not all rankings and indexes are relevant to Ukraine in 2022. The range of nation indexes and rankings is wide, including surveys that focus on rather specific topics, such as environmental stability, gender equality, press freedom, and many other. Not all of the topics are applicable to Ukraine in 2022, since the ongoing hostilities have drastically changed life in Ukraine. Therefore, in this report we focused on surveys that compare the overall perception of nations. Another important factor that influenced the methodology was the fact that not all of the 2022 indexes & rankings editions capture the impact of Russia's aggression on Ukraine's performance. Therefore, the analysis was made on a limited number of surveys that rely on the data collected after the beginning of Russia's full-scale invasion of Ukraine or at least make special adjustments in the case of Ukraine. Such an approach ensures that the analysis considers the extraordinary impact of the war in all possible areas. Bearing this in mind, we expect the methodology of this report may be adjusted in the future, basing on Ukraine's priority areas which will be specified in its brand strategy.

Nation Brands 2022 (Brand Finance)

It has been generally accepted that the country's image has a direct impact on the national brand value. The more positively a nation is perceived internationally, the more chances it offers for economic growth — driving investment, export, tourist and talent flow. Brand Finance has been issuing its Nation Brands report since 2005. It is a study into the world's top 100 nation brands ranked by their value and strength. The nation brand strength combines statistics and perception research. It is derived from three pillars: the country's investment in building a strong nation brand, domestic and international perceptions about the nation brand, and the macroeconomic — performance of the nation brand. The nation brand value is calculated by combining the brand strength index with the gross domestic product data.

According to recent research [4], the damage that the war has caused to Ukraine's economy is enormous, making its brand value drop by US\$22 billion — from US\$107 billion to US\$85 billion. At the same time, the Ukrainian people's and government's astonishing resilience has positively impacted the country's brand strength score which has gone up by over 5 points year on year from 52.8 to 57.9 out of 100.

Global Soft Power Index 2023 (Brand Finance)

The Global Soft Power Index is based on global research of people's perceptions of nation brands, with responses gathered from over 100,000 people across more than 100 countries, as well as on qualitative interviews with global decision-makers and influencers.

In the Global Soft Power Index 2023, based on the research data collected in 2022, after the start of Russia's full-scale invasion, Ukraine added 10 points to its soft power score over the year, more than any other nation in the study, largely driven by a substantial increase in its influence. In 2023, Ukraine ranks 37th (up from 51st) with a 44.3 soft power score and increased familiarity, reputation, and overall influence. Ukraine sits among the top 20 most influential countries globally. It enjoys high attention of the global public, being the 3rd country in terms of the "affairs followed closely". Ukraine also ranks high within the Governance pillar, being 12th on the "internationally admired leaders".

The authors of the Index acknowledge that this is the result of the successful execution of Ukraine's internal and external diplomatic communications approach that helped to bring the Western alliance together and resist the unprovoked and illegal invasion of Ukraine by Russia.

Brand Finance's research conducted in March 2022 [1] provide additional highlights on Ukraine's results in soft power development. According to the results [1], in less than half a year Ukraine's familiarity has increased from 51% to 71%, reputation — up to 61points (+5 points), and influence — up to 44 points (+7 points) (figure 14).

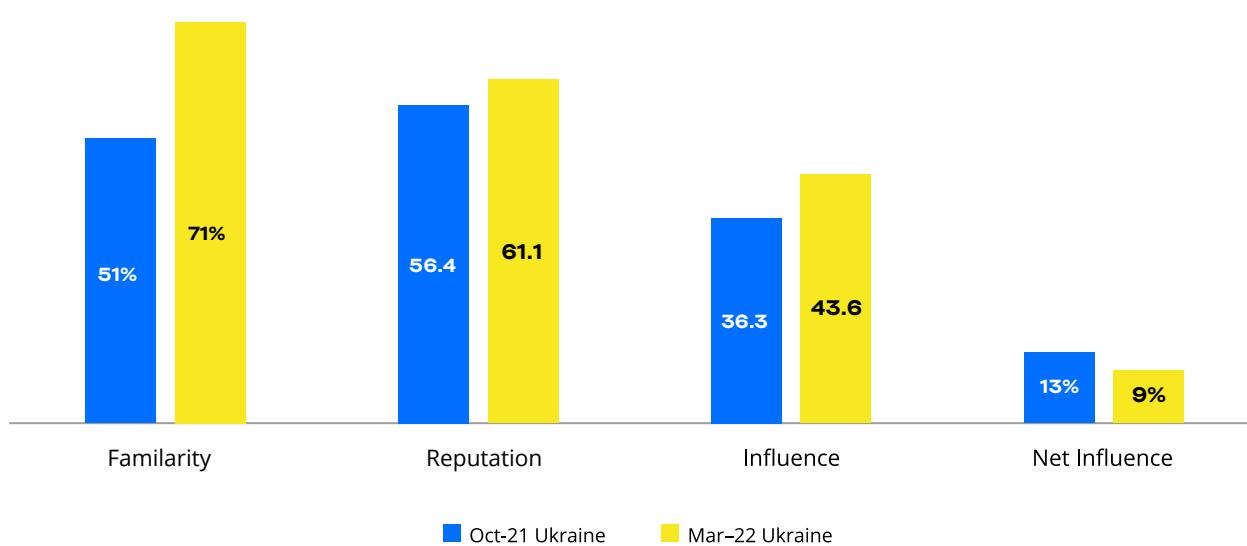


Figure 14: Ukraine's Perceptions Change.

Source: Brand Finance

Among the ten surveyed markets, South Africa demonstrated the highest growth of familiarity with Ukraine (+32 p.p.), followed by Brazil (+29p.p.), and India (+26p.p.).

The country's perceptions that enjoyed the highest improvement, according to the research, were:

- Tolerance +165%
- Trustworthy media +128%
- Respect for law and human rights +108%
- Leading-edge technology +90%
- Good relations with other countries +67%

Only three out of ten major markets which were surveyed in the research captured a negative change in Ukraine's reputation scores — China (-4 points), Turkey (-0.4), and India (-0.4).

Nation Brands Index 2022 (The Anholt-Ipsos)

In the Anholt-Ipsos Nation Brands Index [31], which examines the global perception of 60 nations among the population of 20 countries, Ukraine has climbed one spot to 47th position in 2022. Ukraine was the second country in terms of news awareness, with 79% of global citizens having seen, heard, or read about it. Although country images usually move slowly in this index, Ukraine's brand score has been rising slightly more steeply than the average country since 2014.

Ukraine has experienced the highest increase in terms of its governance perception, defined as the perceived competency and honesty of government and its treatment of citizens and respect for their rights, as well as global behavior in the areas of international peace and security, environmental protection, and the reduction of world poverty. Attitudes towards Ukraine's exports have also improved: Ukraine has jumped from 46th in 2021 to 34th in 2022 in terms of people's willingness to buy the country's products. With the increased score for the perception of Ukrainian people, the general desire to have a close friend or hire people from Ukraine has risen. The index dimensions that had a negative trend in 2022 were: Immigration and Investment, Tourism, and Culture.

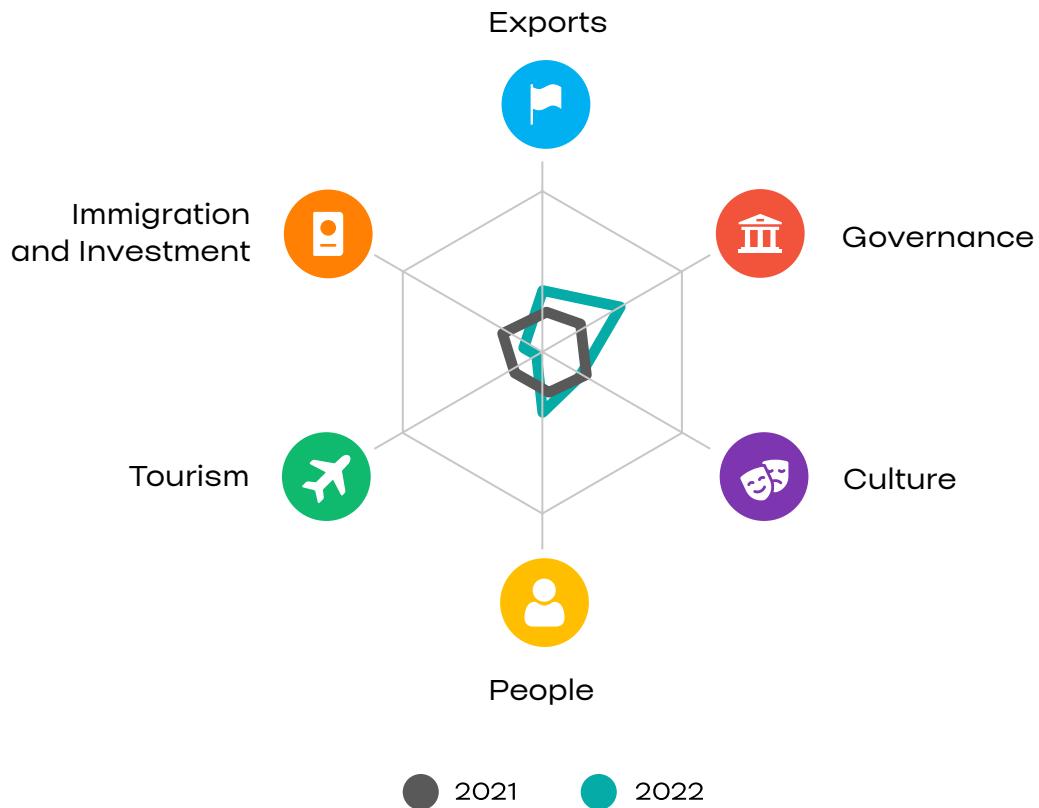


Figure 15: Change of Ukraine's perceptions in terms of the Anholt-Ipsos NBI dimensions.

Soucre: Anholt-Ipsos Nation Brands Index 2022

U.S. News Best Countries Rankings

According to the annual U.S. News Best Countries Ranking [32], which is based on a global survey of the qualitative characteristics of 85 countries of the world, Ukraine climbed 9 positions reaching 62nd place in 2022. The world's attitude towards Ukraine as an important international player has significantly increased. In the sub-rating of countries by influence on the international arena, Ukraine climbed 19 places, taking 14th place among 85 countries. Respondents rated Ukraine's political influence at 54 points out of 100, and its military power at 65.6 points. In addition, the perception of Ukraine as a member of powerful international alliances has tripled compared to 2021.

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Appendix A

List of Ukraine's Brand Attributes

1. Ukraine is nation of heroes
2. Ukraine is free nation
3. Ukraine is democratic country
4. Ukrainians are creative people
5. Ukraine has thousand-year-old history and culture
6. Ukraine is a tech/IT country
7. Ukraine is a member of the European family
8. Ukraine has beautiful nature

Keywords and phrases used for detection of Ukraine's brand attributes in media

Ukraine is nation of heroes	Ukraine is free nation	Ukraine is democratic country	Ukrainians are creative people	Ukraine has thousand-year-old history and culture	Ukraine is a tech/ IT country	Ukraine is a member of the European family	Ukraine has beautiful nature
ukraine brave ukraine glory ukraine great powerful country extraordinary courage fight evil inspire ukrainians country brave country powerful ukraine bravely brave country ukraine stand independent sovereign bravery people courage resilience brave people spirit Ukraine determine defend bravery defender sovereign nation ukraine encourage ukraine hero warrior fight beloved country ukraine deserve	euukraine free freedom freedom ukraine freedom stand ukrainians free freedom country value freedom free independent Ukraine bless ukraine freedom independence beloved everyone ukraine fight freedom inspire world defend independence defend homeland freedom fight justice freedom independence freedom free society	independence freedom democratic nation democracy freedom ukraine idea nation independent ukraine restore protect democracy fight independence defend right part democratic policy ukraine democracy call ukraine corrupt free independent ukraine political right defend democracy support ukraine leadership independent nation democracy Ukraine freedom independence	creative ukraine ukraine humor creative people create kind fun moment creative economy skill talent protect democracy way creative creative way people create creative industry skill experience talent ukrainian can inspire innovation technology digital innovation passion people fun people local content create employment opportunity digital innovation funny people development platform create	art ukrainian book ukrainian ukrainian youth identity ukrainian director ukrainian ukrainian nationalism ukrainian dancer skill ukrainian way ukrainian people ukrainian rich ukrainian history ukrainian book musician ukrainian film ukrainian ukrainian director culture language century ukrainian monument ukrainian ukrainian diaspora cultural identity ukrainian monument intellectual ukrainian dancer ukrainian brave cossacks ukrainian art ukraine culture	ukrainian it sector digital development ukrainian website cyber ukrainian navy official it ukraine software ukrainian history ukrainian rich ukrainian history ukrainian book musician ukrainian film ukrainian ukrainian director culture language century ukrainian monument ukrainian ukrainian diaspora cultural identity ukrainian monument intellectual ukrainian dancer ukrainian brave cossacks ukrainian art ukraine culture	ukraine part europe european unity european course course european integrate european ukraine europe family software ukrainian network government minister fedorov ukraine it government network minister transformation ukraine it country tech ukraine ukrainian technology cybersecurity ukrainian system ukrainian official navy	nature ukraine ukrainian nature Ukraine nature beauty

Ukraine is nation of heroes	Ukraine is free nation	Ukraine is democratic country	Ukrainians are creative people	Ukraine has thousand-year-old history and culture	Ukraine is a tech/ IT country	Ukraine is a member of the European family	Ukraine has beautiful nature
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"If there is only one positive consequence of this war, it would be the improved image of Ukraine on the world stage."

Jose Filipe Torres

*CEO, Nation and Place Branding Global
Director at Bloom Consulting*

BRAND UKRAINE

2023

