

BRAND
UKRAINE

UKRAINE'S GLOBAL PERCEPTION REPORT 2023

Ukraine's Global Perception Report is a comprehensive analysis of Ukraine's perception abroad, which is based on data from leading international and Ukrainian analytics and research companies and contains a list of practical recommendations for the development of the national brand of Ukraine and its international 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 an independent organisation that, since February 2022, has been systematically working on the development of the national brand of Ukraine abroad.

We implement impactful communication projects, develop the Ukraine.ua digital ecosystem, and monitor Ukraine's global perception using a data-driven approach. Our mission is to make Ukraine a lovemark for the world.



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FOREWORD FROM BRAND UKRAINE



Maria Lypiatska,
Head of Brand Ukraine

Last year, for the first time, the BRAND UKRAINE team unveiled a unique report detailing the global perception of Ukraine in 2022. Our analysis encompassed over 51 million international media publications about Ukraine, included a comprehensive review of international sociological surveys, and assessed Ukraine's position in leading global rankings and indices.

Drawing from this extensive dataset, we arrived at a clear conclusion: in 2022, the country's national brand notably strengthened. Amidst its brave resistance to Russian aggression, Ukraine's recognition abroad didn't just improve significantly; for the first time, the nation was broadly acknowledged as an influential player on the international stage.

2023, the second year of the full-scale war, witnessed a noticeable shift. The current report reveals a gradual, though anticipated, decrease in global attention towards Ukraine. Factors such as delays in military aid from the US and its allies, the grain crisis, protests on the border with Poland, and the international community's focus diverted to a new conflict outbreak in the Middle East might suggest a simplistic narrative that "the world is tired of Ukraine." However, our comprehensive analysis of the country's global image over the past year indicates that the reality is more complex.

In contrast to the unprecedented surge of attention during the initial months of the full-scale invasion, 2023 saw a 20% reduction in the number of publications about Ukraine in international media and a drop of over 40% on social networks. Moreover, a study by the Reuters Institute found that the topic of the war in Ukraine has become the most deliberately avoided in online content consumption, particularly among those experiencing news fatigue.

However, Ukraine has not vanished from the global agenda. In fact, by the end of last year, it ranked the fourth globally for the most followed national

news. Furthermore, our research clearly shows that the interest in Ukraine has broadened significantly beyond just the context of war. For instance, there has been a notable increase in foreign interest in our cultural and sports achievements. This diversification indicates that Ukraine's national brand has become more complex and, as a result, more resilient over time.

Even with fewer media mentions, Ukraine maintains its reputation as politically and diplomatically influential, militarily strong, and well-recognized internationally. The global community largely backs our fight against Russian aggression, with the vast majority of Western societies supporting military, humanitarian, and financial aid for Ukraine. Moreover, the past year has seen a growth in the proportion of Europeans who support Ukraine's accession to the EU and NATO.

However, there are concerning developments as well. Despite the fact that Ukraine's visibility and influence remain above pre-invasion levels, our overall reputation has regressed to its 2021 status. According to the Brand Finance Global Soft Power Index, Ukraine's perception in 2023 has deteriorated across several indicators, ranging from the ease of doing business to the appreciation of our cultural heritage.

Our objectives remain steadfast: all efforts must persistently aim towards achieving victory and furthering Ukraine's development. However, the strategies employed to reach these goals require a qualitative transformation. This shift will bolster Ukraine's capacity to assert itself as an expert voice with the agency in the international field. Therefore, our communications should pivot to embrace strategic depth, sensitivity to the global context, diversification of topics related to Ukraine, agency, and a data-driven approach as central elements.

REVIEWS AND FEEDBACK

«The analytical report on Ukraine’s global perception represents another step towards understanding how our country is viewed internationally. This report’s significance lies in its narrative approach, transforming meticulously gathered data and facts into a compelling story of Ukraine’s triumphs and challenges. It offers specific recommendations that are useful to those dedicated to enhancing Ukraine’s international image and strategic communications on behalf of Ukrainian society. For the Ministry of Foreign Affairs of Ukraine, which bases its operations on factual evidence, this report serves as an additional resource for refining strategies and approaches, pinpointing the most effective avenues for public diplomacy and external communications, planning future initiatives, and assessing the impact of current projects. The MFA utilizes this information to foster a deeper connection between Ukraine and people worldwide, thereby bringing our victory closer.»

Viktorija Lialina-Boiko, Director of the Department for Public Diplomacy and Communications of the MFA of Ukraine

«The report wisely highlights the critical need for coordination among all stakeholders involved in Ukraine’s national strategic communications. Among these, other countries play a significant role, collaborating with Ukraine and amplifying its ability to capture the attention and affection of people in the farthest reaches of the globe. There was a time when simply spreading the truth seemed sufficient in the nations of the so-called Global South. However, given the entrenched anti-Western sentiment there, alongside a nostalgic view of the USSR’s role in anti-colonial struggles, it’s crucial for Ukraine today to clarify its fight against the former empire attempting to reclaim control and undermine the nation’s sovereignty. The report offers an insightful takeaway on the necessity of not just crafting regional strategies, but also diving deep into the unique communication nuances of each specific country.

This report acts as a vital safeguard against skewed understanding of Ukraine’s global perception, preventing undue alarmism and the defeatist notion that ‘all is lost’ within Ukrainian society. Now, more than ever, there is a pressing need to meticulously manage the information field: the government must maintain a unified voice, and on the international stage, collaborate with the opposition to articulate messages deeply aligned with Ukraine’s core values.»

Dr. Olexiy Haran, Research Director of the Ilko Kucheriv Democratic Initiatives Foundation, Professor of Comparative Politics at the National University of Kyiv Mohyla Academy

ACKNOWLEDGEMENTS

We express our deepest gratitude to the Armed Forces of Ukraine, who have done and continue to do the impossible for the freedom and prosperity of our country, as well as for protecting the future of the whole of Europe.

We would like to thank the President and the entire top administration of the country for their significant contributions to the development of the national brand of Ukraine. We express our special gratitude to the Ministry of Foreign Affairs of Ukraine for the efficient cooperation in the area of international communications on behalf of our country.

We highly appreciate the information and analytics provided by our friends and partners: The UK Foreign, Commonwealth & Development Office (FCDO), Brand Finance, LOOQME, and Zinc Network.

We express our sincere gratitude to the European Union for its institutional support.

EXECUTIVE SUMMARY

This report marks our second attempt to analyse how the world viewed Ukraine over the year. The first Ukraine's Global Perception Report was created following the most difficult year in the history of independent Ukraine. The heroic resistance of Ukrainians to Russia's brutal and unjustified aggression had led to an unprecedented increase in global attention and awareness of Ukraine. This, in turn, positively impacted the country's image across various characteristics, strengthening Ukraine's national brand. However, a year ago, we already pointed out that the great opportunities that come with great upheavals inevitably bring new challenges. Thus, in early 2023, the predictions of a gradual natural decline in the level of attention and positive attitudes towards Ukraine were absolutely justified.

Given the oversaturation of the information space with data, ideas, and opinions, there is a tendency in public discourse to simplify the complex issues of national or international significance into the black and white judgements. The active discussions in the media and speeches by public figures regarding the problems of Ukraine receiving international aid, especially towards the end of 2023, might have contributed to the impression that "the world is tired of Ukraine" (Ukraine fatigue). This report aims to avoid polarisation and subjective judgements around the world's perception of Ukraine. Instead, we offer an unbiased and balanced analysis of Ukraine's global image in 2023. Our conclusions are drawn from data obtained through monitoring the international information landscape, opinion surveys conducted in various regions around the world, and comparative national brand rankings and indices.

The world's attention to the news from Ukraine, measured in the number of international media publications and discussions in social media, naturally decreased in 2023 after an extreme surge during the previous year. However, as highlighted in the section "Ukraine in International News and Social Media", the drop in the number of mentions is not that significant when compared to other cases of international coverage of countries at war. The content analysis of publications about Ukraine in international media reveals that the world's attention was not solely concentrated on the tragic aspects of the war. Coverage spanned a wide array of topics, including literature, art, sports, international trade, foreign relations, and many others. Only 28% of the media coverage focused on active hostilities and the consequences of attacks, a significant decrease from the first year of the full-scale invasion

when half of all stories about Ukraine centred on these issues. Even though the global audience's search activity about Ukraine also dropped after a historical maximum in 2022, the variety of search queries shows that the interest of the general public in Ukraine was not limited to the news about the war.

Sociological surveys also confirm that during the second year of the full-scale war, international attention to news from Ukraine has waned. "Compassion fatigue"¹ has taken its toll, and Ukraine has become a topic that is most often deliberately avoided when consuming media content (for more details, see the section "The Global Public's Perception of Ukraine (Attention to Ukraine)"). However, this does not mean that Ukraine has vanished from the global public agenda. By the end of the year, news from Ukraine ranked fourth among the most followed worldwide².

The year 2023 added important image characteristics to the international media coverage of Ukraine: the share of articles containing references to the national brand attributes increased by 2 percentage points, reaching 10% in English-language online media. The most popular characteristics of Ukraine in the media were heroism and democracy.

Although some foreign politicians have attributed their lack of political will to provide aid to Ukraine to low levels of public support, sociological data analysis reveals that, despite a moderate decline in support, the majority of citizens in allied countries continue to endorse various forms of assistance to Ukraine. Moreover, specific measures, such as supporting Ukraine's accession to NATO and the EU, are gaining popularity.

Impartiality in studying a country's global image requires considering regional differences in perception. The analysis of associations with Ukraine in 12 countries in different parts of the world³ revealed that people's views are shaped not only by regional nuances but also by socio-cultural, political, and economic ties, as well as their level of awareness about Ukraine. While war remained the predominant association with Ukraine in 2023, in countries like Egypt, India, and the UAE, the country is also associated with progress,

¹ "Compassion fatigue" is a term from media consumption research that suggests prolonged exposure to information about human suffering can lead to audiences emotionally shutting down. Over time, this overwhelming exposure can cause people to consciously avoid such news (Susan D. Moeller, 1998, Susan Sontag, 2003)

² Global Soft Power Index 2024, Brand Finance

³ Public opinion survey in 12 countries, conducted by Zinc Network on behalf of the Ministry of Foreign Affairs of Ukraine, September 2023

technology, history, culture, tourism, nature, and personal feelings among other aspects.

The prolonged war has led to Ukraine's decline in all key national brand rankings and indices in 2023. Not surprisingly, tourist attractiveness, security and stability, and environmental sustainability scores have seen logical declines. However, the impact of Russia's invasion has extended beyond these areas, negatively affecting other characteristics less directly related to the war. On a positive note, despite these challenges, Ukraine has strengthened its position as an influential international player (for more details, see the section "Ukraine in International Rankings and Indices").

In the aftermath of the second year following the full-scale invasion, Ukraine's national brand value saw a remarkable increase of 20%, reaching 99 billion US dollars, according to the latest Global Soft Power Index. International financial assistance, stable operations of its energy production and the sea corridor, as well as the return of refugees — all these factors, according to experts from Brand Finance, contributed to Ukraine becoming the fifth fastest-growing country in terms of its national brand value in 2023.

CONCLUSIONS AND RECOMMENDATIONS

The unprecedented level of threat that Ukraine faced in 2022, met with extraordinary courage and resilience, led to a significant surge in global attention and altered perceptions of the country. In 2023, as the war in Europe evolved into a new reality, there was a natural and predictable decrease in media focus and news coverage. This reduction in attention and the impact of various external factors connected to the war have influenced Ukraine's international reputation to different extents. Drawing from the data in this report and analysing the global context, we present the following conclusions and recommendations to enhance Ukraine's reputation among international audiences.

1. Compassion and news fatigue are essential factors that must be taken into account when planning Ukraine's future communication strategies.

There has been a noticeable decline in media and social network coverage of Ukraine. This trend can partly be attributed to the media's limited capacity to maintain interest in ongoing tragedies over extended periods; a topic further explored in the section "Ukraine in International News and Social Media." Furthermore, the phenomenon of "news fatigue" or "news avoidance" has intensified in recent years, fueled by the overwhelming influx of information instantly available to internet users worldwide. For those managing Ukraine's image and reputation internationally, these challenges necessitate amplified efforts to effectively communicate Ukraine's narrative proactively and to combat disinformation campaigns misinterpreting the waning attention as a reduction in support from international partners.

The data from 2023 clearly indicates that the extraordinary surge in interest in Ukraine, following the onset of the full-scale invasion, has developed into a wider range of topics through which the international community engages with the country. While news about hostilities and their repercussions has declined, there has been a notable increase in mentions of Ukraine related to sports and culture.

Hence, the development of humanitarian and cultural cooperation programs, fostering new connections between Ukrainians and people

from other nations in different areas, and proactive promotion of contemporary Ukrainian cultural and scientific achievements are already aiding in shaping a multidimensional global brand for Ukraine, one not solely associated with war.

Furthermore, Ukraine's significant potential for agency in the international information sphere lies in its approach to generating its own news, taking into account the current context within specific time frames in identified countries or regions and using a logic of seeking the best solutions not only for itself but also for other countries. Such an approach will help underscore Ukraine's role as an important player on the international stage, offering systemic solutions and defending not only its territorial integrity and sovereignty but also promoting sustainable peace and development for the benefit of humanity in various fields. The truest and finest hallmark of leadership is the ability to uphold shared values through tangible actions, not just slogans.

2. Most global media mentions of Ukraine are news-related, reflecting events relevant at specific moments. Ukraine confronts a challenge: it needs to initiate its own news stories and push its narratives to transition from being merely a topic of discussion to a subject shaping discussions. Compared to 2022, the proportion of media mentions in 2023 related to themes Ukraine aims to be associated with (brand attributes) rose by 2 percentage points, from 8% to 10%.

In 2023, topics that garnered significant media and social network attention included Eurovision, hosted by Great Britain on behalf of Ukraine, and the courageous act of Elina Svitolina, Ukraine's leading female tennis player, who refused to shake hands with her Belarusian opponent at Wimbledon 2023. International events serve as powerful magnets for global or regional attention; thus, strategically crafted communication campaigns surrounding such occurrences can effectively direct focus towards Ukraine's primary narratives.

3. The most effective results are attainable through coordination among all stakeholders involved in strategic communications and public policy development, considering the communicative objectives of such policies for both domestic (Ukrainians within and outside the country) and international audiences. When communication efforts are grounded in well-crafted, consensus-driven policies and strategies, their long-term impact is enhanced, and they become more resilient to crises and abrupt shifts in the external landscape.

The presence of clear plans and strategies for primary areas of external communication is crucial for nurturing international partnerships and sustaining ongoing support for Ukraine from allies, while guarding against political instability.

In 2024, significant electoral events are scheduled, including presidential elections in the USA, parliamentary and presidential elections in various European Union countries, and elections to the European Parliament. Although there is a relatively strong base of support for Ukraine among the populace in these democratic nations, specific issues about Ukraine may be leveraged by political entities during election campaigns to ignite domestic debates.

Ukraine's communications should rely on well-developed policies and plans, which typically encompass not only key messages for dissemination but also expert analyses of specific actions along with their advantages or risks for all stakeholders involved. Such detailed plans facilitate national interest promotion despite fluctuations and episodic crises. Furthermore, collaborating with international allies in communications, particularly concerning plans on pivotal topics, enhances Ukraine's predictability as a partner and aids in attaining superior outcomes through collective action.

In 2024, coordinated communication efforts regarding Ukraine's EU membership will be critically important as accession negotiations begin. Similarly, systematic communication strategies regarding Ukraine's integration into NATO are essential, particularly in the lead-up to this year's NATO Summit in Washington. International sociological data indicate increasing support for Ukraine's accession to the EU and NATO. This positive trend should be bolstered by proactive communication efforts (for more details, refer to the section "The Global Public's Perception of Ukraine").

4. The international perception of Ukraine can be synthesised only through aggregated metrics such as global indices and ratings from leading research organisations. To influence these perceptions effectively, targeted efforts must be made in each specific country or region, leveraging accurately gathered and interpreted data on their culture, history, political and socioeconomic contexts, and existing awareness levels about Ukraine. Regional perceptions are shaped by various elements, including historical connections, media narratives, economic relationships, and cultural similarities. In the "The Global Public's Per-

ception of Ukraine” section, we provide survey results from the adult population in 12 countries, clearly indicating that not geographical factors alone shape people’s views on Ukraine.

In countries allied with Ukraine, public associations differ significantly from those in states exhibiting a more neutral stance towards Russia’s aggression against Ukraine. In supportive countries, where news of the full-scale war has dominated for two years, Ukraine is primarily linked with war repercussions. Conversely, in nations where the war is less emphasised in the media, people tend to associate Ukraine with varied phenomena and concepts, often stemming from personal interactions with Ukraine or Ukrainians. This variation suggests a need to recalibrate communication strategies in countries focusing less on Ukrainian issues, aiming to enrich and broaden positive perceptions. Adopting this strategy could effectively inform these audiences about Ukraine’s potential as a beneficial partner, showcasing its valuable resources, assets, and initiatives for the global community and specifically for those target nations.

Considering the practical nature of international politics and the global emphasis on addressing complex, long-term challenges, it is more effective for Ukraine to highlight its contributions and potential benefits in technology, agriculture, environmental protection, and defense innovations. This approach is likely to produce better results in communication efforts than attempting to sway the population of these countries against Russia immediately.

It is crucial to encourage direct interactions between individuals in Ukraine and those in countries where awareness is minimal across diverse fields, from media and science to business networks and humanitarian efforts. The allure of digital communication lies in its clear benefit of reaching extensive audiences across Asia, Africa, the Middle East, or Latin America with relatively limited resources. However, in a world growing more divided, the value of personal connections, friendships, professional networks, and face-to-face engagements is immeasurably important.

5.

The comprehensive approach to strategic communications management, underpinned by data and detailed policies and plans, stands both in the short term and in the years to come.

Despite the anticipated decline, the continued high level of attention and the growing recognition of Ukraine's culture, language, and history beyond the war context must be considered and evaluated within the broader framework of their impact (positive or negative) on the level, quality, consistency, and efficiency of international support. While Ukraine has received widespread support and Russia has been commonly condemned as the aggressor, with Ukrainian businesses and products also gaining increased backing, the perception of Russia as a threat and European views on how to resolve the war are revealing. The Munich Security Report 2024⁴ indicates a reduction in the perceived threat from Russia in 2023 compared to 2022. Additionally, a January 2024 survey by the European Council on Foreign Relations across 12 countries⁵ revealed that only one in ten Europeans believed in a military victory for Ukraine, whereas twice as many anticipated a Russian victory. In the face of still strong support for aiding Ukraine against aggression, these perceptions signal potentially hazardous discourses for Ukraine regarding the prospects of a "peaceful" or "diplomatic" resolution, which might imply negotiations involving concessions from all involved parties. Although these topics are not directly examined in this report, their analysis is crucial for Ukraine's strategic communications, which must navigate the actual landscape of events.

⁴ Munich Security Report 2024, <https://securityconference.org/en/publications/munich-security-report-2024/>

⁵ "Wars and elections: how European leaders can maintain public support for Ukraine", <https://ecfr.eu/publication/wars-and-elections-how-european-leaders-can-maintain-public-support-for-ukraine/>

UKRAINE IN INTERNATIONAL NEWS AND SOCIAL MEDIA

What is this section about? Coverage of a country in the international media is not the sole factor but plays a significant role in influencing its perception abroad. Hence, a comprehensive understanding of how the world viewed Ukraine in 2023 is unattainable without analysing the global information space. In this section, we will focus on three key aspects of media source analysis: online news media, social networks, and the Google search engine.

International online media analysis specifics. The surge in global attention to Ukraine following February 24, 2022, has led to an overwhelming volume of information in online media, which complicates not only the qualitative analysis but also the collection and accumulation of a comprehensive database of references. Given the technical challenges posed by the sheer volume of information and the complexity of the subject, we consciously refrain from quantifying the exact number of articles about Ukraine in the global media. Instead, we focus on analysing overarching trends. We firmly believe — based on extensive experience in seeking optimal analytical approaches — that a high-quality content analysis of a multifaceted issue like wartime Ukraine can only be achieved by integrating automated methods with deep expert analysis. Therefore, the quantitative trends highlighted in this section are derived from automated media monitoring techniques, while the insights into key themes and narratives are the result of meticulous, ongoing examination of publications about Ukraine by BRAND UKRAINE analysts throughout 2023.

Discussions in social media analysis specifics. Analysing narratives on social media presents unique challenges compared to news media due to the nuances in language and expression found in posts and comments. For instance, automated systems struggle to accurately interpret the meaning and sentiment behind statements like “When did Ukraine become our 51st state?”⁶ without human input. As a result, this section’s conclusions regarding key social media topics are drawn from manual analyses of a select number of highly popular posts each month. Quantitative trend conclusions, on the other hand, are derived from automated analysis methods. Due to the technical limitations of collecting data on social media, the analysis is based mainly on data from social network X (Twitter).

⁶ Post on X, <https://twitter.com/zerohedge/status/161680702292357121>

Ukraine in Google’s world search, analysis specifics. Conclusions regarding the global Google audience’s interest in Ukraine drawn from the analysis of quantitative data obtained from Google Trends for the search term “Ukraine,” and regular monitoring of trending queries related to this topic by BRAND UKRAINE analysts throughout 2023. Google Trends assigns a popularity score to search queries on a scale from 0 to 100, where a score of 100 represents the peak popularity for the term within a specified time frame.

UKRAINE IN NEWS MEDIA

Media’s increased interest in significant tragedies tends to be fleeting. Research on wars and armed conflicts media coverage patterns reveals news stories peak within weeks or, at most, months following the initial event, before rapidly declining⁷. According to experts, this decline in attention typically occurs either when a conflict is resolved or when it becomes apparent that it will be prolonged⁸. In protracted wars, moments of escalation and violence receive a brief burst of international media attention, while quieter periods of diplomatic efforts to resolve conflicts receive lower coverage⁹. Studies of international media coverage of the Syrian war in 2013-2014 and the Israeli-Palestinian war in 2009-2015 show that after a surge in the number of news stories at the time of major military operations, the subsequent drop in media attention reaches 60-80%¹⁰.

The decrease in publications about Ukraine in foreign online media in 2023, as compared to the previous year, aligns with academic predictions and is a natural regression. Remarkably, the data suggest that Ukraine maintained an unusually high level of media attention for a country engaged in a war. According to a comparative media monitoring analysis by Looqme, the number of articles about Ukraine in foreign online media in 2023 was only 20% lower than in 2022. Furthermore, the analysis highlights that international support and diplomatic efforts involving Ukraine and its allies were prominently covered topics. For a deeper understanding of how Ukraine was portrayed in international online media throughout 2023, the key findings of our comprehensive research are detailed in this section.

⁷ “Compassion Fatigue How the Media Sell Disease, Famine, War and Death” by Susan D. Moeller, 1999

⁸ Stanford News publication, <https://news.stanford.edu/2022/03/17/reporting-war-ukraine/>

⁹ “The search for common ground in conflict news research: Comparing the coverage of six current conflicts in domestic and international media over time” by C.Baden and K.Tenenboim-Weinblatt, <https://journals.sagepub.com/doi/full/10.1177/1750635217702071>

¹⁰ C.Baden and K.Tenenboim-Weinblatt, <https://journals.sagepub.com/doi/full/10.1177/1750635217702071>

The highest number of publications about Ukraine in the international media was observed in early 2023 (January-March), followed by a moderate decline (Fig. 1). By December 2023, there was a noticeable decrease, with publications about Ukraine dropping by almost 30% compared to the start of the year.

The dynamics of the number of publications and key topics about Ukraine in foreign online news media

The monthly popularity trend for the topic of Ukraine, normalised such that the month with the highest number of publications is assigned a score of 100 points.

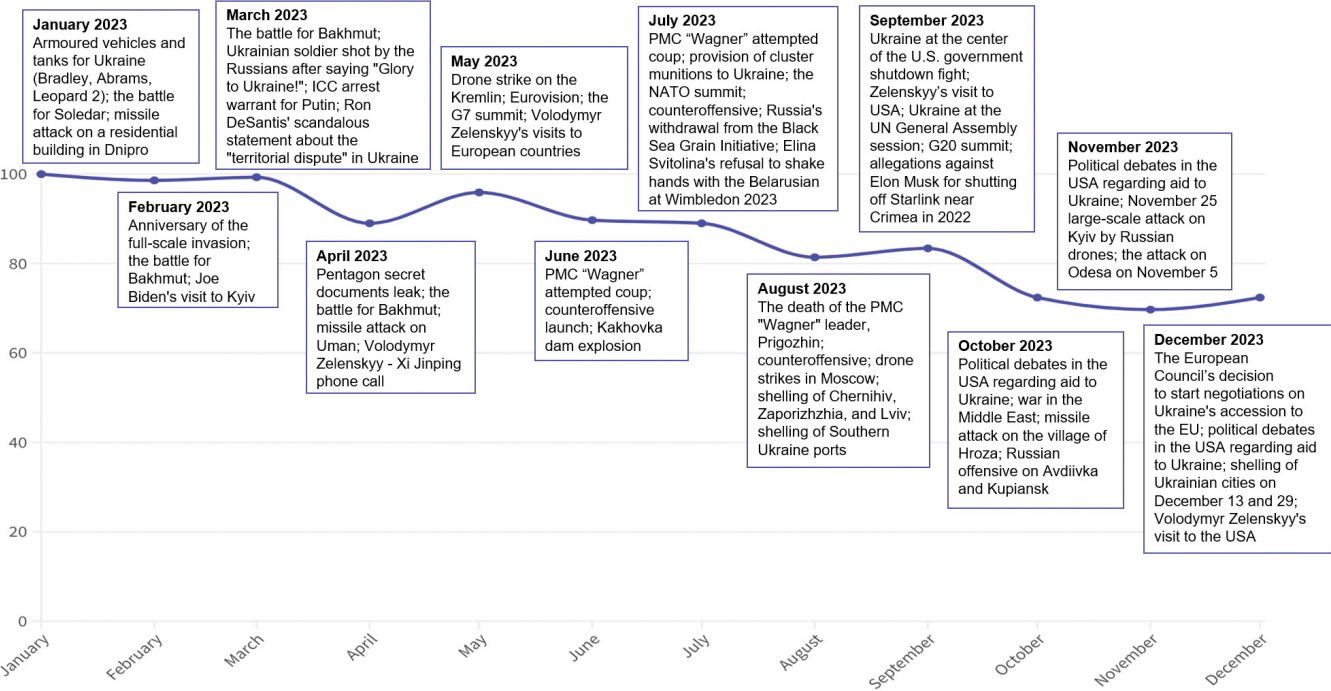


Figure 1: The dynamics of the number of publications and key topics about Ukraine in foreign online news media.

Source: LOOQME media monitoring database, and BRAND UKRAINE'S weekly analytics of Ukraine topic in the leading foreign online media, January-December 2023

The content analysis of publications in the leading international media¹¹ reveals a variety of topics in the information landscape around Ukraine, which were not limited to the coverage of the tragic events.

- Only 28% of media coverage consisted of news about active hostilities and the consequences of attacks (military operations, shelling of cities, man-made disasters (such as the explosion of the Kakhovka hydroelectric power station), deaths of foreign journalists and volunteers, etc.).
- 32% of all articles focused on the international efforts to support Ukraine in its fight against the Russian invaders. Coverage included topics such as the allocation of financial and military aid packages, discussions regarding the continuation of such support, and reviews of the types of weapons needed by Ukraine. Additionally, articles covered international diplomatic activities, including visits, summits, meetings, efforts to find diplomatic resolutions to the war, and anti-Russian sanctions.
- 13% of the media coverage was devoted to the news on sports, culture, business and international trade, everyday life of Ukrainians at home and abroad, and the country's nature.
- Media coverage allocated 12% of its space to articles on Russia's domestic political developments, primarily concerning the Wagner Private Military Company (PMC), and its international relations, with Ukraine being a central focus.
- 15% of the articles addressed a diverse range of topics, each holding a minor proportion of the overall media conversation.

¹¹ Throughout the year, the analytics team at BRAND UKRAINE conducted studies on articles related to Ukraine, focusing on publications from foreign online media with the highest audience reach. The sources analysed included BBC, The New York Times, The Guardian, Fox News, The Washington Post, New York Post, The Wall Street Journal, CNN, Spiegel, Le Monde, El Mundo, NPR, NBC News, and Daily Mail.

Top 20 topics in articles about Ukraine published in the international online news media in 2023



Figure 2: Top 20 topics in articles about Ukraine in the international online news media in 2023 (the larger the bubble size, the higher the share of voice the topic had in the entire media landscape about Ukraine).

Source: BRAND UKRAINE'S weekly analytics of Ukraine topic in the leading foreign online media, January-December 2023

Other topics in articles about Ukraine published in the international online news media in 2023

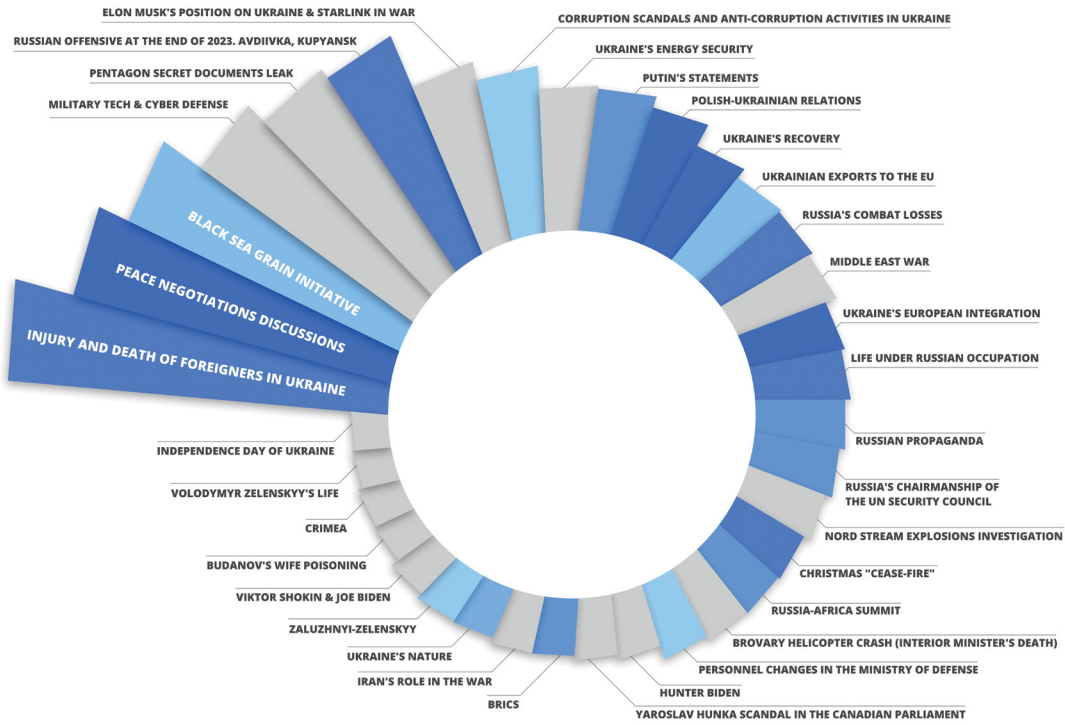


Figure 3: Topics in articles about Ukraine in the international online news media with a share of voice of <1% (the larger the column size, the higher the share of voice the topic had in the entire media landscape about Ukraine).

Source: BRAND UKRAINE'S weekly analytics of Ukraine topic in the leading foreign online media, January-December 2023

UKRAINE IN SOCIAL MEDIA

According to Looqme's comparative analysis, the global social media discourse about Ukraine saw a 42% decrease in posts in 2023 compared to 2022. Unlike in news media, where a consistent decline in publications was noted throughout the year, the dynamics of social media discussions were more erratic (Fig. 4). This analysis predominantly reflects the perspectives of the American audience due to the significant representation of the X social network (Twitter) in the dataset. Key discussion themes included U.S. aid to Ukraine, criticism of President Biden by supporters of Donald Trump, and, notably after Hamas's attack on Israel in October, allegations of the West's double standards regarding Ukraine and Palestine. The most engaging posts for the international audience in 2023 were characterized by criticism from notable figures such as Elon Musk, who questioned the prioritization

of Ukraine’s borders over those of the United States, political commentator Jackson Hinkle’s urging to “wake up from the lies,” and Tucker Carlson’s interview with Viktor Orban, which purported to reveal “what is really happening in Ukraine”. (Fig. 5).

The dynamics of the number of publications about Ukraine and key topics in social media

The monthly popularity trend for the topic of Ukraine, normalized such that the month with the highest number of posts is assigned a score of 100 points

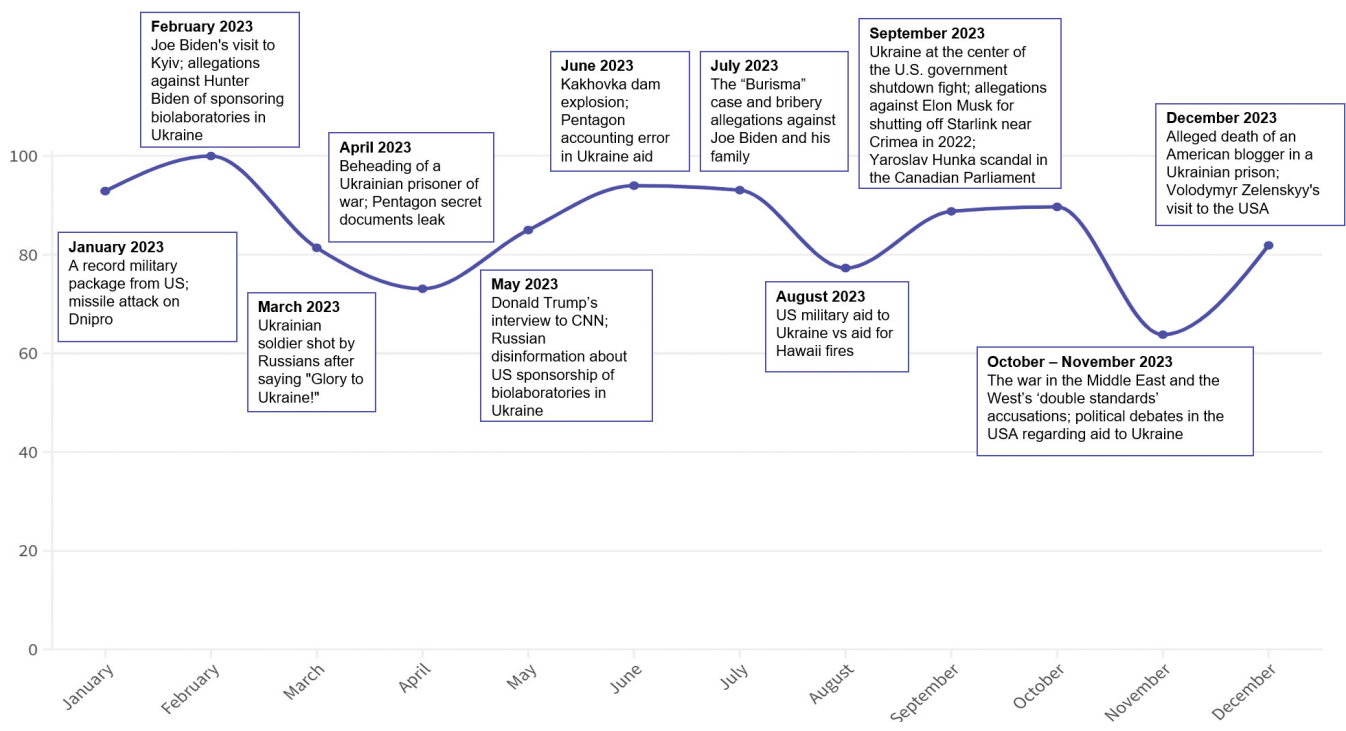


Figure 4: The dynamics of the number of publications about Ukraine and key topics in social media in 2023.

Source: LOOQME media monitoring database, analysis of posts with the highest engagement level, January-December 2023

The most popular posts about Ukraine in social media in 2023

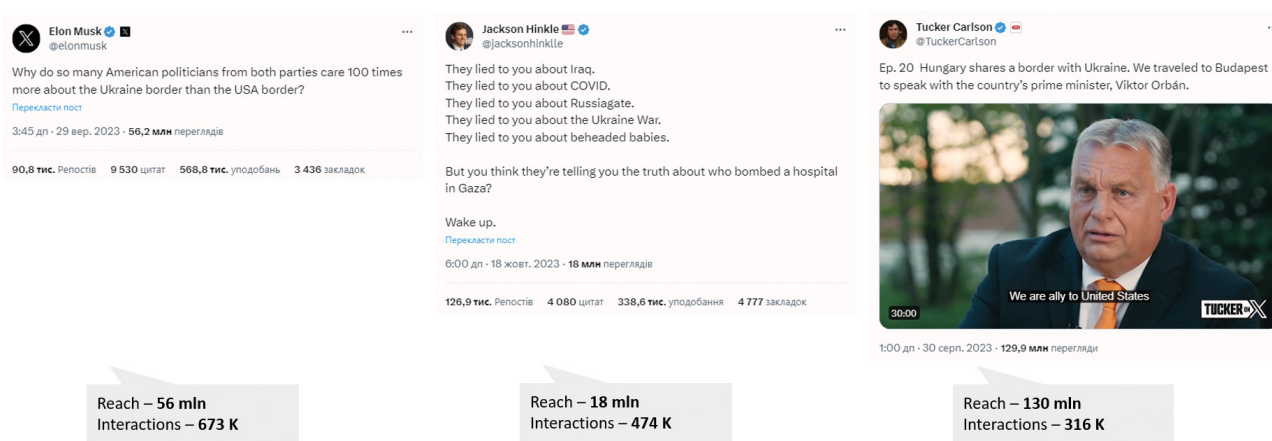


Figure 5: The most popular posts mentioning Ukraine in social media in 2023 (by reach and engagement).

Source: LOOQME media monitoring database, January-December 2023

UKRAINE ON GOOGLE

Maintaining the world's interest in Ukraine is an important task for the coming years, as this attention directly affects crucial political decisions for Ukraine, including the allocation of further aid from its allies. One of the most telling sources of information about the interest of ordinary people in Ukraine is Google trends.

According to Google trends, in 2023, the global audience's search interest in Ukraine was declining after a huge rise last year. In December 2023, the level of search activity returned to the levels typical to the period before the full-scale invasion. By the end of the year, Ukraine was no longer among the most trending queries on Google, overshadowed by other global issues, such as the war in the Middle East. The audience's interest in the war in Ukraine has diminished compared to a year ago, leading to a shift in the nature of the news that spiked search activity about Ukraine in 2023. Many of these trending queries were related to non-war events, with a notable focus on sports. Search trends do not always coincide with key topics in the media, so they are an important source of information about proactive interest in Ukraine.

Dynamics of the global search activity for “Ukraine” query on Google, 2004-2023

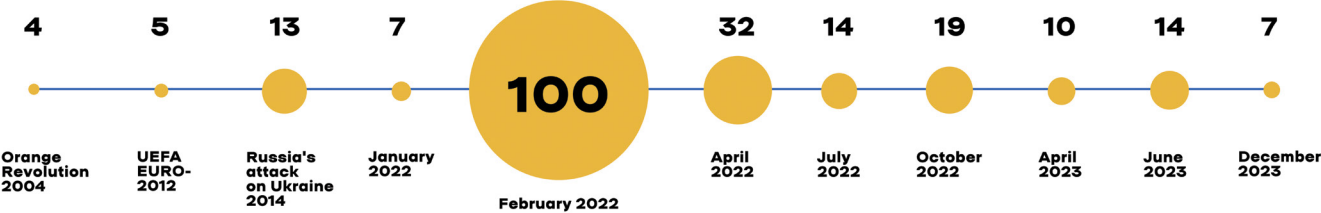


Figure 6: Trend of “Ukraine” search query on Google, worldwide, 2004-2023.

Source: Google Trends

In February 2022, Google search interest for ‘Ukraine’ surged to unprecedented levels, peaking at a rate seven times higher than the previous record established in 2014, the year when Russia first invaded Ukraine. Back then, the Google Trends score for ‘Ukraine’ was at 14 points, but in February 2022, it skyrocketed to 100 points (Fig. 6). Despite a significant decline in its relevance on Google by the end of 2022, ‘Ukraine’ emerged as the third most trending global query of the year. It was surpassed only by the popularity of the Wordle game and the Indian cricket team’s match against England. Notably, in the news category, ‘Ukraine’ ranked as the top trend, surpassing news about Queen Elizabeth II’s death.

In 2023, the search interest in Ukraine continued to decline and in December reached 7 points, returning to the level of January 2022, just before the full-scale Russian invasion. Reflecting this trend, Ukraine disappeared from the list of the world’s top trends in Google’s year-end summary. Meanwhile, in the news category, the focus shifted to another tragic event: the war in the Middle East.

Dynamics of the global search activity for “Ukraine” query on Google in 2023

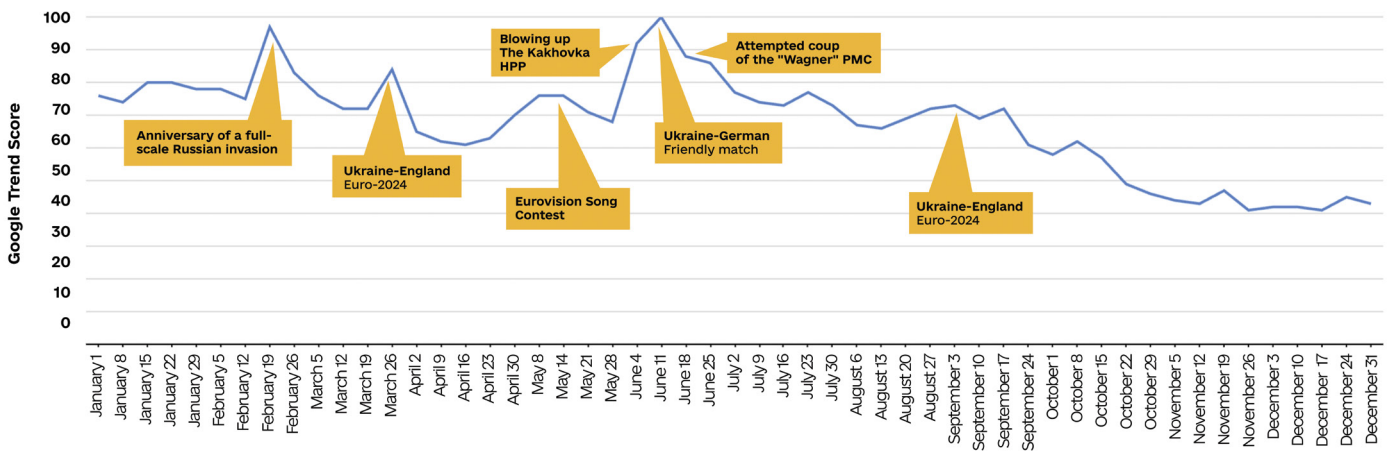


Figure 7: Trend of “Ukraine” search query on Google, worldwide, 2023.

Source: Google Trends

Unlike the previous year, where war-related events drove the most significant spikes in search activity about Ukraine, in 2023, many top newsmakers were events not directly related to combat operations.

News stories that caused a significant increase in search activity about Ukraine in 2023 (Fig. 7):

- Ukraine vs Germany friendly football match (June, 100 Google trend points)
- Anniversary of the full-scale Russian invasion (February, 97 points)
- The explosion of the Kakhovka hydroelectric power station (June, 92 points)
- Attempted coup by the Wagner PMC in Russia (June, 88 points)
- Ukraine-England qualifying football match for Euro 2024 (March, 84 points)
- Eurovision Song Contest (May, 76 points)
- Ukraine-England qualifying football match for Euro 2024 (September, 73 points).

The counter-offensive topic can be highlighted as the one that garnered significant interest throughout the year. People searched for information about the settlements where active fighting was taking place, the articles about the counter-offensive in the leading media, and, influenced by these reports towards year-end, searched for “failed counter-offensive”. A significant number of trending requests were related to weapons provided

to Ukraine by its allies, such as tanks, air defense systems, missiles, and others.

Trending personalities included Ukrainian public figures, such as politicians, athletes, and military personnel, as well as world political figures and celebrities connected to the news about Ukraine. Numerous official visits by the President of Ukraine to other countries, along with visits from foreign delegations to Kyiv also garnered significant attention from the global audience on Google (Figure 8).

Trending queries in the context of Ukraine on Google in 2023: public figures and official visits and speeches



Figure 8: Trending queries in the context of Ukraine on Google in 2023: public figures and official visits and speeches.

Source: Google Trends

During the second year of the full-scale war, global audiences sought to understand why Russia annexed Crimea, when the war in Ukraine started and which side was prevailing, the likelihood of Russia attacking the UK, and the strategic importance of Bakhmut (Figure 9).

Trending questions related to Ukraine on Google in 2023

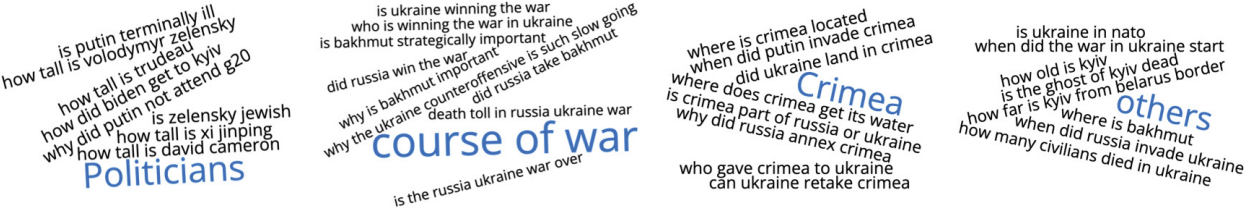


Figure 9: Trending questions related to Ukraine on Google in 2023.

Source: Google Trends

The year 2023 saw many tragic events in Ukraine, reflected in the year's trending Google queries. Key search queries included the shelling of Kyiv and other Ukrainian cities, the explosion at the Kakhovka hydroelectric power station, the beheading of a Ukrainian soldier, and the death of a pilot known by the call sign "Juice". According to Google, the world was also concerned about the possibility of more global threats, primarily the nuclear threat from Russia (Figure 10).

Trending queries in the context of Ukraine on Google in 2023: tragedies and threats / fears



Figure 10: Trending queries in the context of Ukraine on Google in 2023: tragedies and threats / fears.

Source: Google Trends

Trending queries in the context of Ukraine on Google in 2023: culture, sports, media



Figure 11: Trending queries in the context of Ukraine on Google in 2023: culture, sports, media.

Source: Google Trends

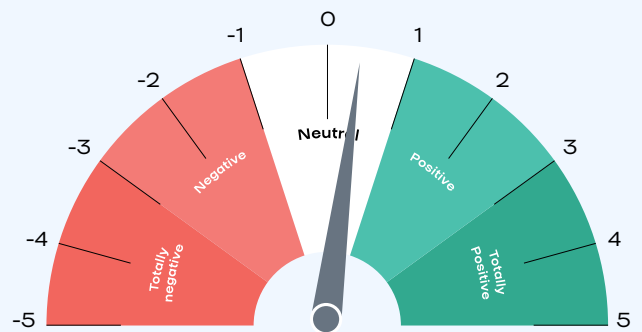
SPECIAL TOPIC: THE COUNTER-OFFENSIVE PULSE 2023

HOW LEADING ENGLISH-LANGUAGE MEDIA APPROACH THE TOPIC

In 2023, the Ukrainian counter-offensive emerged as a dominant subject in foreign media and search trends, capturing global attention. However, the reactions from Ukrainians to the international discourse surrounding the counter-offensive sometimes suggested that Ukraine was falling behind in the narrative battle regarding this issue. This counter-offensive illustrates the tendency to simplify complex matters into binary judgments. In our special analytical project, we aim to dissect how leading English-language media outlets reported on the Ukrainian counter-offensive, using comprehensive data analysis to provide insights.

From the initial media reports on the start of the Ukrainian counter-offensive in June 2023 to the year's end, the tone of coverage fluctuated, influenced by frontline developments and varying statements and analyses from political and expert circles.


The average tone of the articles was neutral slightly tending towards a positive assessment. The average tonality score on a scale from -5 (totally negative) to 5 (totally positive) was 0.5.



Tone of voice score 0.5

Key messages development

June

 "...long-anticipated counteroffensive began..."

"...stakes are high..."

"...high casualties..."


July

"...slow but steady..."

 "...mines stymie Ukraine's counter-offensive..."

"...the fight mostly stalemated..."

August

 "...progress on another front: the Black Sea..."

"...the war likely to go well beyond next year..."


September

 "...notable progress..."

"...next step..."

"...modest but meaningful gains..."

October

 "...time is running out..."


"...counter-offensive hasn't achieved a breakthrough..."

November

 "...a foothold on the eastern bank of the Dnipro River..."

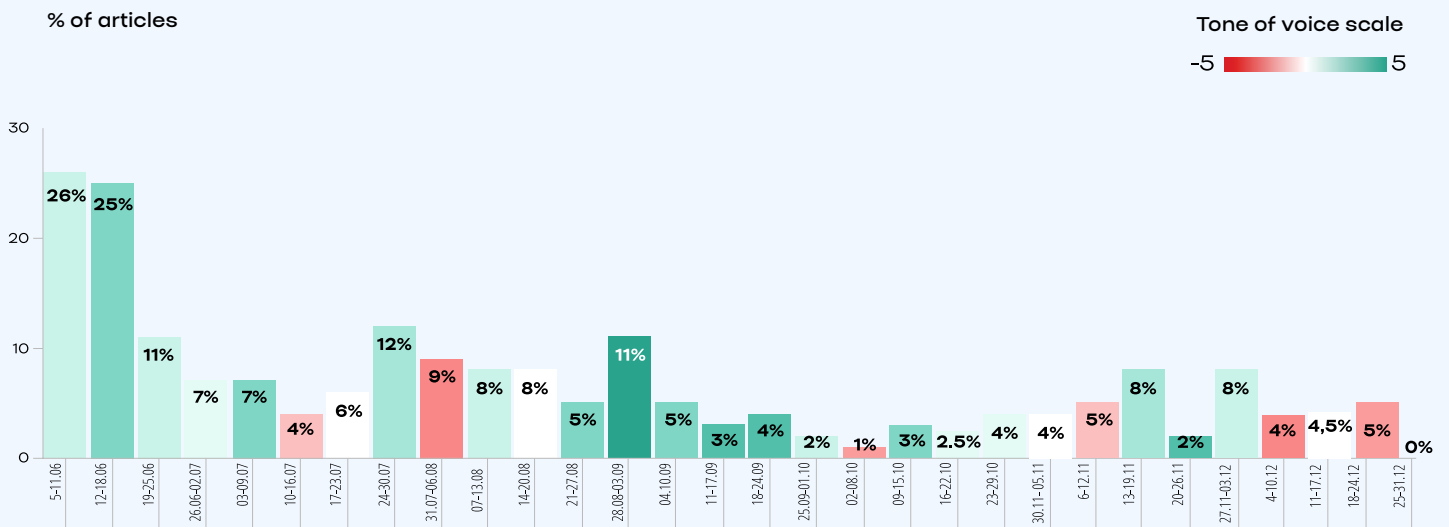
"...Ukraine's counter-offensive is stalled..."

December

 "...nothing went as planned..."

"...war weary but determined..."

The counter-offensive topic: share of voice & tone of voice, weekly trend in the Ukraine-related English-language media landscape



Share of voice: The focus on the counter-offensive in Western top media was particularly pronounced in the first two weeks of June, following initial expert assessments that Ukraine had commenced counter-offensive operations. During this period, counter-offensive discussions featured in 25% of all articles about Ukraine. Interest in the topic surged with Ukraine’s announcements of liberating new territories, exemplified by the villages of Staromayorske and Robotyne. The year’s end saw a heightened focus on the counter-offensive, attributed to the Armed Forces’ successes on the left bank of the Dnipro and analysts’ eagerness to review the year’s outcomes.

Tone of voice: The tone of articles on the counter-offensive reached its most positive pitch in late August and September, mirroring the Ukrainian Armed Forces’ victories in Zaporizhzhia and Donetsk regions, notably the liberation of villages such as Robotyne, Andriivka, and Klishchiivka. Western media characterized these events as significant advancements and a breakthrough. Conversely, the tone became less positive towards the year’s end, influenced by authors’ intentions to review annual results and concentrate on challenges.

Key Ukraine-related topics in media in 2023 (share of voice):

International support	PMC Wagner’s “coup”	Western weapons for Ukraine	Shelling of Ukrainian cities	Counter-offensive
20%	7%	6,5%	6%	5,5%

Source: articles about Ukraine and its counteroffensive in BBC, The New York Times, Daily Mail, The Guardian, Fox News, The Washington Post, New York Post, The Wall Street Journal, NPR, NBC News, CNN

UKRAINE'S BRAND ATTRIBUTES IN MEDIA

Brand attributes of a country are enduring characteristics, qualities, symbols, and associations that contribute to a positive perception among an international audience. Currently, Ukraine lacks an officially approved national brand development strategy, resulting in undefined brand attributes. Nevertheless, during discussions in 2021 with communications professionals and experts engaged in shaping Ukraine's image, a preliminary list was created to periodically assess their representation in foreign media. This list is subject to future amendments in alignment with any national brand strategy that the Ukrainian government may endorse.

In 2023, the proportion of articles about Ukraine that addressed at least one of the eight predefined brand attributes rose by 2 percentage points, accounting for 10% of the overall share of voice in English-language online media. The two most popular characteristics of Ukraine in 2023 were "Nation of Heroes" and "Democratic Country", which together represented half of the publications that included reputational attributes. "Member of the European family", "Free nation" and "Thousand year old history and culture" each received a comparable share of attention, contributing to 35% of the articles featuring brand attributes. The least common characteristic was "Beautiful nature", consistent with the previous year's findings (Fig. 12). While "Member of the European Family", "Free Nation" and "Tech (IT) Country" saw a decrease in representation compared to the previous year, "Nation of Heroes" and "Creative People" saw notable increases in their portrayal.

The reputational attributes of Ukraine were most frequently mentioned in publications published on the occasion of the anniversary of the full-scale invasion in late February. Other events that increased the presence of image-based national characteristics included the release of a video of a Ukrainian prisoner of war being executed after saying "Glory to Ukraine"; the NATO summit; the counter-offensive near Bakhmut; the Eurovision Song Contest; remarks made by the Chinese ambassador to France regarding the status of former Soviet republics in international law; and the European Council's decision to start negotiations on Ukraine's accession to the EU.

Popularity of Ukraine’s brand attributes in the English-language media (share of voice among all articles with brand attributes)

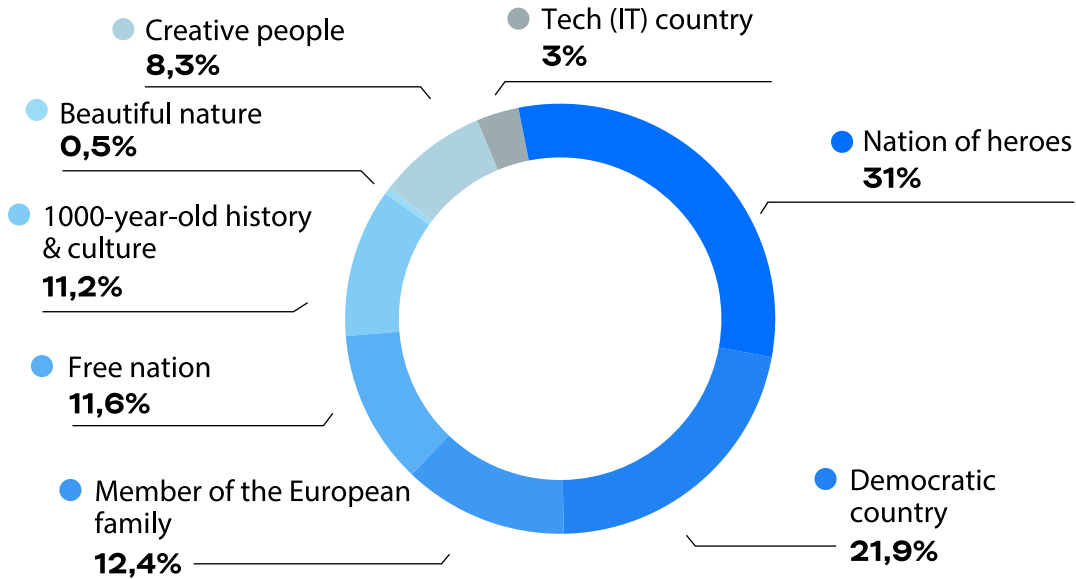


Figure 12: Popularity of Ukraine’s brand attributes in the English-language media (share of voice among all articles with brand attributes)

Source: media content analysis conducted by LOOQME for BRAND UKRAINE, January-December 2023

Dynamics of the number of publications containing Ukraine’s brand attributes in English-language online media, 2023

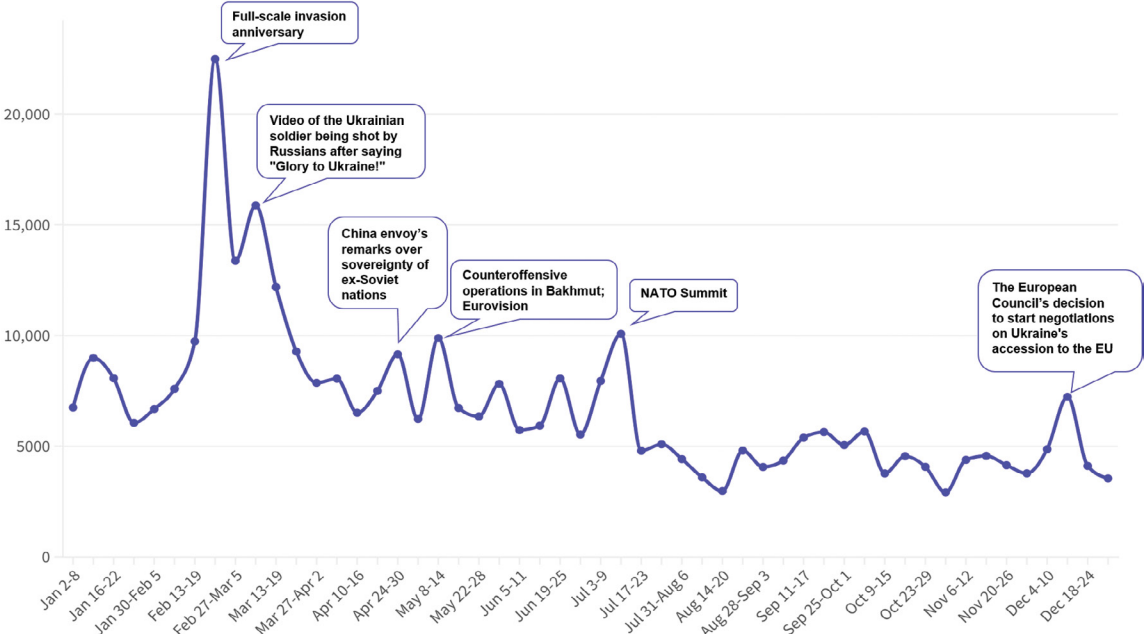


Figure 13: Dynamics of the number of publications containing Ukraine's brand attributes in English-language online media, 2023

Source: media content analysis conducted by LOOQME for BRAND UKRAINE, January-December 2023

THE GLOBAL PUBLIC'S PERCEPTION OF UKRAINE

What is this section about? This section is dedicated to examining the international community's view of Ukraine, particularly during the second year of the full-scale war. It aims to provide insights into how people around the world view Ukraine, the level of attention and support it receives from global citizens, and the associations and perceptions people have of the country. This analysis will cover differing perspectives across various world regions.

The methodology employed in this section includes desk research of reputable public opinion surveys and the analysis of primary data from a study conducted by the Zink Network at the request of the Ministry of Foreign Affairs of Ukraine. The section will leverage data from respected sources such as the Eurobarometer, the Reuters Institute, the German Marshall Fund, and the Chicago Council on Global Affairs to paint a comprehensive picture of how Ukraine is perceived globally.

DECREASED ATTENTION TO THE NEWS FROM UKRAINE

Researchers studying the dissemination of media information and audience perception have long utilized the concept of compassion fatigue, particularly in relation to the consumption of news on global crises such as wars, epidemics, and environmental disasters. Compassion fatigue refers to the emotional exhaustion that arises from prolonged exposure to distressing information about human suffering, leading to a deliberate avoidance of media content on these topics¹². Therefore, the waning attention to news about Ukraine during the second year of its full-scale war was an anticipated outcome, especially after the unprecedented global interest that followed Russia's full-scale invasion of Ukraine in 2022.

According to research conducted by the Chicago Council, 68% of US adults were following news from Ukraine in autumn 2023, a decrease from 84% in spring 2022¹³. Additionally, the Reuters Institute's study on media consumption trends reveals that the war in Ukraine has become the most

¹² "Is compassion fatigue inevitable in an age of 24-hour news?" by E.Gabbert, <https://www.theguardian.com/news/2018/aug/02/is-compassion-fatigue-inevitable-in-an-age-of-24-hour-news>

¹³ Chicago Council on Global Affairs Research, October 2023, <https://globalaffairs.org/sites/default/files/2023-10/CCS%202023%20Ukraine%20Brief.pdf>

frequently avoided news topic. Specifically, 39% of respondents who often or occasionally avoid certain media content reported deliberately avoiding news about Ukraine¹⁴.

A Zink Network survey, conducted for the Ministry of Foreign Affairs of Ukraine, covered public opinion in 12 countries and found that only 16% of adults discuss the war in Ukraine with friends or relatives (Figure 14). Additionally, there was a noticeable decline in the topic’s relevance among populations in all surveyed countries where data were collected for two consecutive years.

Discussion of the war in Ukraine among adults in other countries (% participating in conversations at gatherings and with friends or relatives)

% of respondents who discuss the war in Ukraine

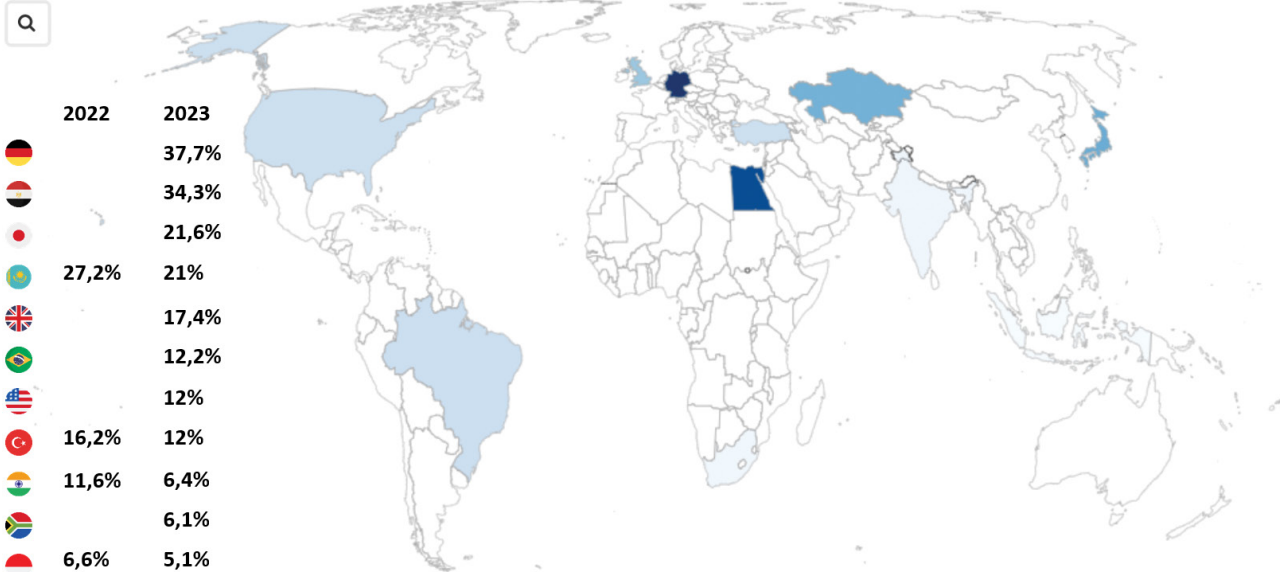


Figure 14: percentage of the country’s adult population who discuss the war in Ukraine at various gatherings and in conversations with friends or relatives

Source: public opinion survey in 12 countries, conducted by Zinc Network on behalf of the Ministry of Foreign Affairs of Ukraine, September 23

¹⁴ Digital News Report 2023 by Reuters Institute, https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2023-06/Digital_News_Report_2023.pdf

HIGH SUPPORT FOR PROVIDING AID TO UKRAINE

The percentage of the citizens in the allied countries who approved of providing various types of aid to Ukraine remained high in 2023, although slightly lower than the peak levels observed in early 2022. By the end of 2023, support remained strong, with 89% of the EU population backing humanitarian aid for Ukrainians, 84% supporting the continued acceptance of Ukrainian refugees in the EU, 72% endorsing ongoing financial and economic support for Ukraine, and 60% approving of the provision of weapons and military exercises (Fig. 15)¹⁵.

Public approval of the EU's response to Russia's invasion of Ukraine

■ providing humanitarian support to the people affected by the war
 ■ providing financial support to Ukraine
 ■ financing the purchase and supply of military equipment to Ukraine
 ■ welcoming into the EU people fleeing the war

% support in EU

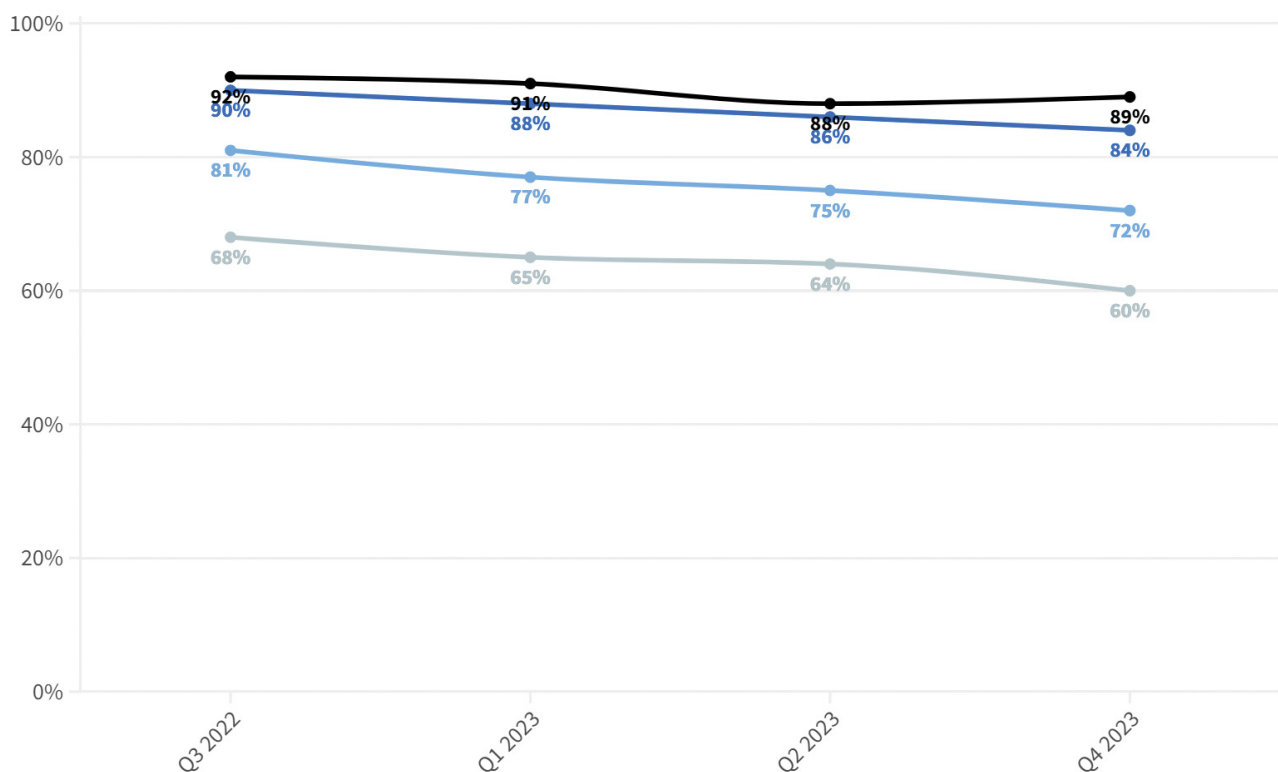


Figure 15: The percentage of adults in the EU who approve of the EU's response to Russia's invasion of Ukraine

Source: Standard Eurobarometer 97, 98, 99, 100

In the US, overall support for providing economic and military aid to Ukraine, though slightly lower than last year, has remained notably higher in 2023

¹⁵ Standard Eurobarometer 97-100, <https://europa.eu/eurobarometer/surveys/browse/all/series/4961>

compared to 2015, when Russia occupied and annexed Crimea (Figure 16). According to the Chicago Council Survey, Democratic Party voters show the highest level of support, with the smallest decline observed during the second year of the full-scale invasion. Conversely, Republican Party voters are less likely to support aid to Ukraine and have exhibited the greatest decline in support¹⁶.

The support of the US population for economic and military aid to Ukraine

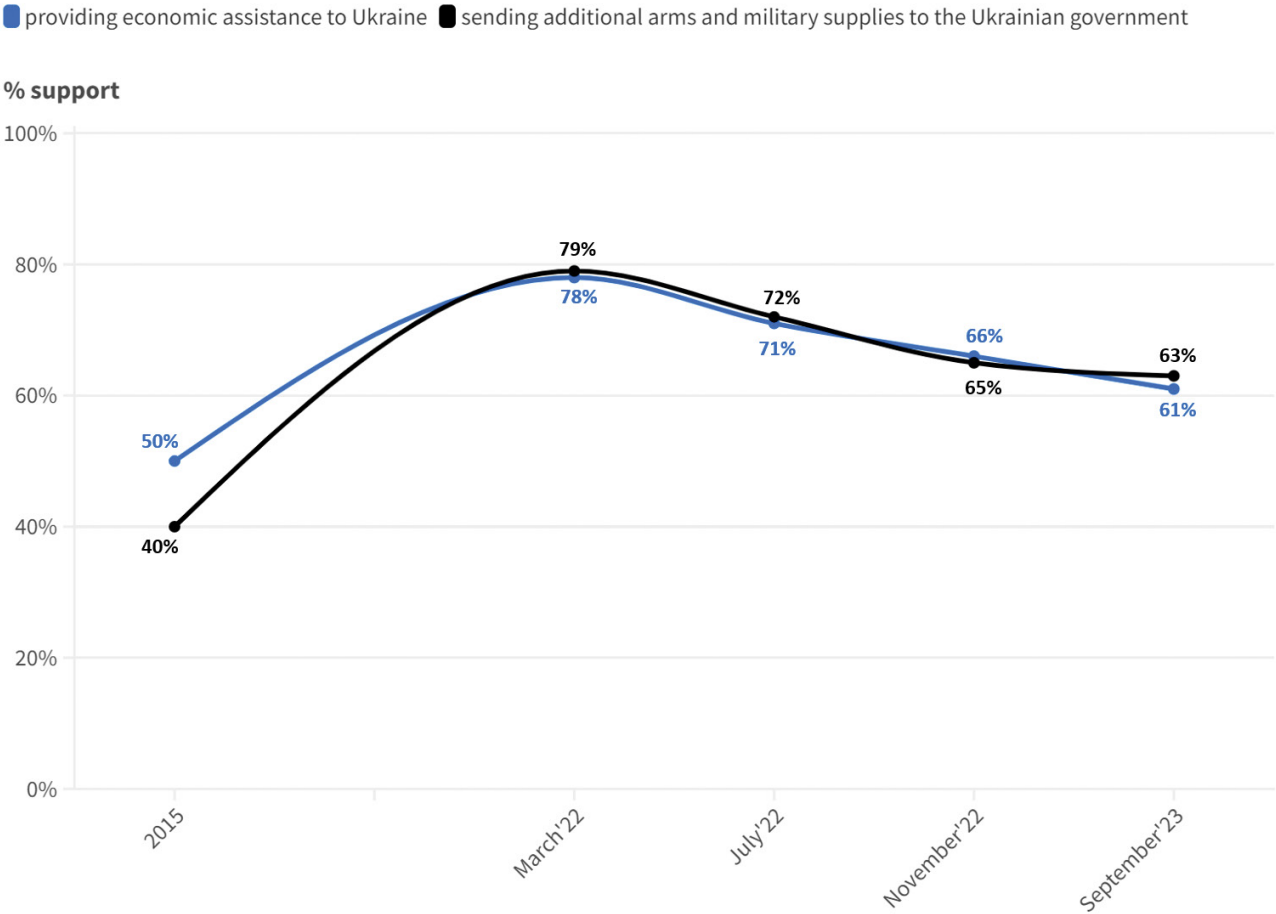


Figure 16: Percentage of US adults who support economic and military aid to Ukraine

Source: Chicago Council Surveys

A public opinion survey conducted regularly in six European countries (Poland, the UK, Spain, Germany, France, Italy) throughout 2022-2023 revealed that the most supported EU action in response to Russian aggression at the end of

¹⁶ Chicago Council on Global Affairs Research, October 2023, <https://globalaffairs.org/sites/default/files/2023-10/CCS%202023%20Ukraine%20Brief.pdf>

2023 was to strengthen economic and diplomatic sanctions against Russia¹⁷. In Australia, the vast majority of citizens continue to approve of sanctions against Russia (87% of the population), the acceptance of Ukrainian refugees in their country (84% of the population) and the provision of military aid to Ukraine (76%)¹⁸.

GROWING SUPPORT FOR UKRAINE’S EUROPEAN AND EURO-ATLANTIC INTEGRATION

2023 was a historic year for Ukraine on its path to European and Euro-Atlantic integration. In November, the European Commission published a report on Ukraine’s progress under the EU’s 2023 Enlargement Package, and in December, the European Council decided to start the accession negotiations with Ukraine. The NATO Summit in Vilnius in July 2023 announced the establishment of the NATO-Ukraine Council, a joint body where Allies and Ukraine sit as equal participants to advance political dialogue, engagement, cooperation and Ukraine’s aspirations for membership in NATO¹⁹. At the summit, NATO leaders agreed that Ukraine’s future belongs within the Alliance. In a significant move, it was decided to waive the Membership Action Plan requirement, thereby shortening its path to NATO membership.

Support for Ukraine’s European and Euro-Atlantic integration among the Western population did not decrease, but actually increased in 2023. In fourteen leading Western countries, 61% of the population agreed that Ukraine should be offered NATO membership, an increase from 58% in 2022. Similarly, 63% approved of the idea of inviting Ukraine to join the EU, a figure consistent with the previous year²⁰. In 2023, a majority of the EU population, 61%, favored granting Ukraine the status of an EU candidate²¹.

¹⁷ An Updated Look at European Attitudes Toward Russia’s War in Ukraine, Zogby Research Services, October 2023, <https://static1.squarespace.com/static/52750dd3e4b08c252c723404/t/657646410370701e64c5dcbc/1702250049884/Ukraine+October+2023+FINAL.pdf>

¹⁸ A sociological survey of public opinion in Australia by the Lowy Institute, <https://poll.lowyinstitute.org/charts/australias-response-war-ukraine/>

¹⁹ NATO-Ukraine Council, https://www.nato.int/cps/ru/natohq/topics_217652.htm?selectedLocale=en

²⁰ GMF’s Transatlantic Trends study, 2022-2023, <https://www.gmfus.org/transatlantic-trends>

²¹ Standard Eurobarometer 100, <https://europa.eu/eurobarometer/surveys/detail/3053>

Support for Ukraine's NATO membership

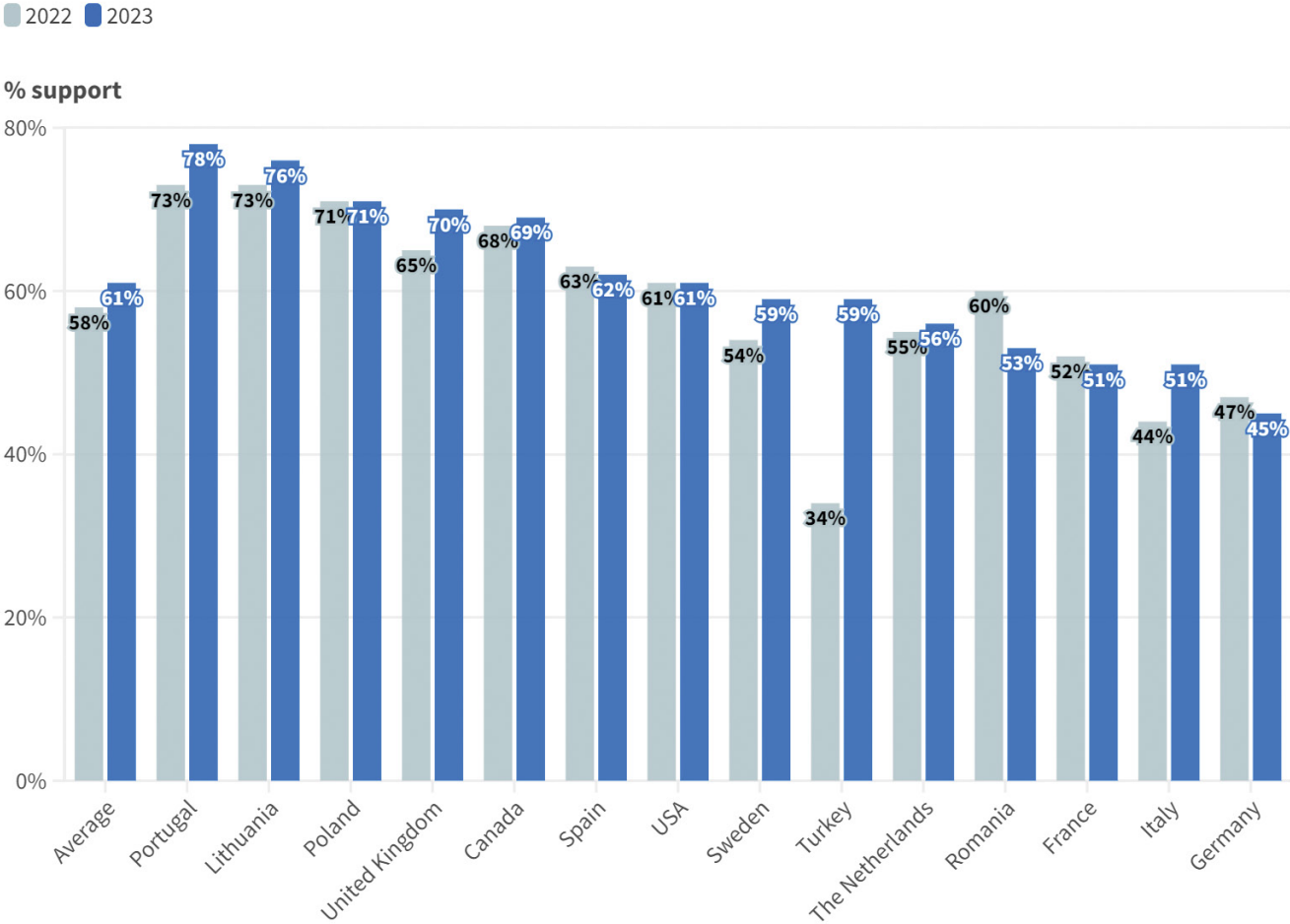


Figure 17: The percentage of the adult population in surveyed countries that support granting NATO membership to Ukraine

Source: GMF's Transatlantic Trends study, 2022-2023

Support for Ukraine's EU membership

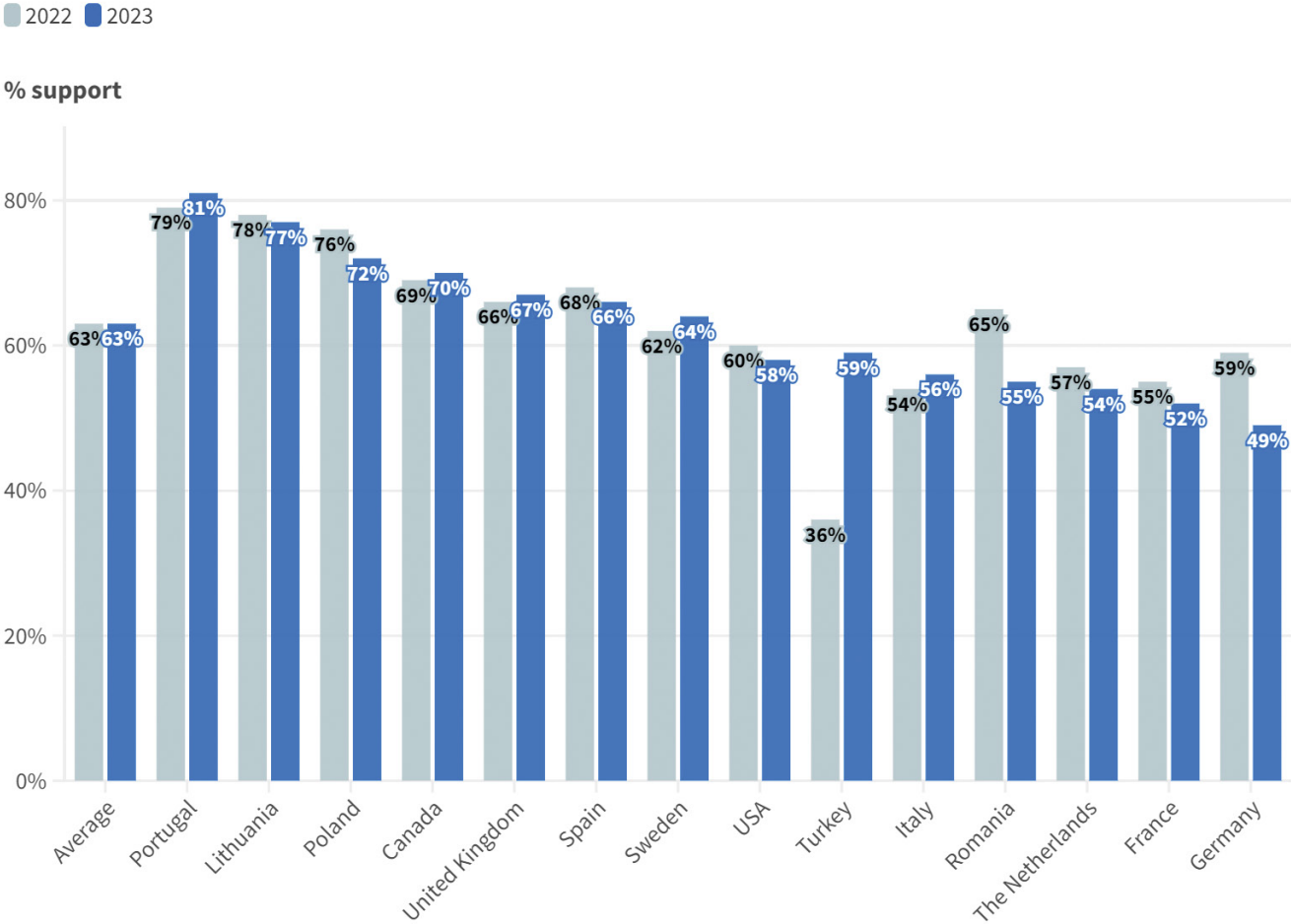


Figure 18: The percentage of the adult population in surveyed countries that support granting EU membership to Ukraine.

Source: GMF's Transatlantic Trends study, 2022-2023

REGIONAL DIFFERENCES IN UKRAINE'S PERCEPTION

When trying to form a generalized picture of a country's international perception, it's crucial to recognize that the lens through which one country views another can vary significantly across different world regions. These regional differences in perception can stem from a range of factors, including historical relationships, media portrayals, economic connections, and cultural similarities. This diversity highlights the complex nature of international relations and underscores the importance of grasping these nuances for country's effective communication in various parts of the world.

A survey conducted in 12 countries revealed that perceptions of Ukraine are shaped by more than just geography; they are also influenced by specific socio-

cultural, political, and economic relationships, as well as the level of awareness about Ukraine. Participants were asked to name three words they associate with Ukraine. In Western allied countries such as the US, the UK, and Germany, associations predominantly relate to war. Positively, Ukraine is described as "brave", "resilient", "independent", "democratic", and "supported". Negatively, the associations include "war", "sadness", "danger", "suffering", "victim", "destruction", etc. In Japan, the positive associations are complemented by the characteristics of Ukraine as an agricultural country: "wheat", "agriculture", "grain", "sunflower". On the negative side, Japanese respondents uniquely emphasize nuclear danger ("nuclear war", "nuclear weapons", "nuclear power plant") (Fig. 19).

Associations with Ukraine among the population of allied countries



Figure 19: associations with Ukraine in allied countries (USA, UK, Germany, Japan) (top of mind)

Source: public opinion survey in 12 countries, conducted by Zinc Network on behalf of the Ministry of Foreign Affairs of Ukraine, September 2023

In other countries in Asia, Africa, Latin America and the Middle East, perceptions of Ukraine are markedly more varied. Although the association with war remains prevalent, these countries also recognise Ukraine for its attributes in progress and technology, history and culture, tourism and nature, people and personal connections and feelings, Ukrainian cuisine, football and even medicine (Figure 20).

UKRAINE IN INTERNATIONAL RANKINGS AND INDICES

What is this section about? Comparative country rankings and indices are an important source of information about the perception of a country in the international arena. These rankings provide a standardized framework for comparing Ukraine's image and progress on a global scale, covering aspects like government, economy, culture, technology, sustainable development, and media. Not all ratings and indices can be considered completely objective, especially when it comes to research based on expert opinions. Such studies may more significantly influence international perceptions than accurately reflect them. This subjectivity highlights the necessity for any country to engage more actively with the creators of these rankings, ensuring that the country's developments and successes are accurately represented. Furthermore, we argue that indices based on public opinion offer a more authentic gauge of a country's reputation abroad. This approach, underpinned by stringent data reliability criteria, informs our selection of relevant indices and ratings in this report.

GLOBAL SOFT POWER INDEX BY BRAND FINANCE

In the 2024 Soft Power Index, based on the 2023 public opinion survey and published in February 2024, the scope has been significantly broadened to include all 193 countries recognised by the United Nations, up from 121 in the previous edition. This comprehensive expansion introduces new dynamics into the rankings, as the inclusion of more countries increases competition, potentially affecting the positions of nations previously assessed.

After a notable rise in Ukraine's soft power during the first year of the full-scale war, which saw an ascent of 14 positions to the 37th place, the year 2023 witnessed a setback. The country experienced a decrease in the majority of soft power attributes, leading to a 1.2-point drop in its overall score and a subsequent fall to the 44th position in the ranking. Despite the decline in soft power, Ukraine maintained significant global recognition, ranking as the 16th most recognisable country worldwide. Moreover, its influence score saw a slight increase of 0.2 points, making Ukraine the 23rd country in terms of international influence (Figure 21).

Ranking of Ukraine in the Global Soft Power Index by Brand Finance in 2023-2024

2023	#37	#15	#68	#19
2024	#44	#16	#76	#23
	Soft Power	Familiarity	Reputation	Influence

Figure 21: Dynamics of Ukraine’s position in the Brand Finance Global Soft Power Index, 2023-24

Source: Global Soft Power Index, Brand Finance

Ukraine has notably advanced in the Media and Communications indicator, now ranking as the fourth globally for the most followed national news. In terms of international relations, Ukraine maintains a stable position, ranking 45th in 2023. This ranking is notably influenced by its significant attribute of influence within diplomatic circles (Figure 22).

Dynamics of Ukraine’s assessment by various attributes of soft power in the Brand Finance Global Soft Power Index in 2023-2024

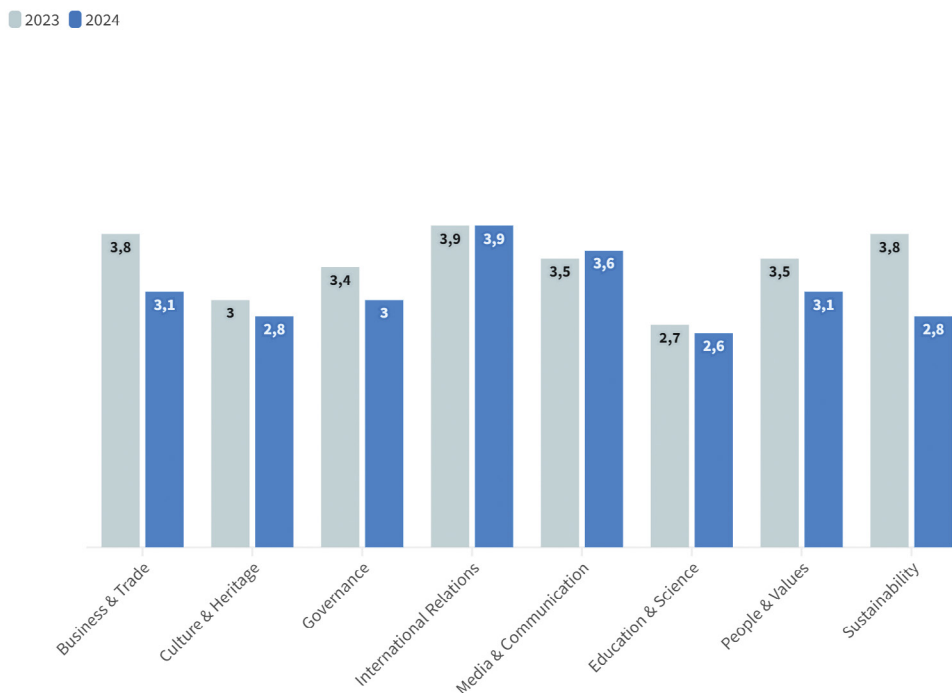


Figure 22: Dynamics of Ukraine’s assessment by various attributes of soft power in the Brand Finance Global Soft Power Index in 2023-24

Source: Global Soft Power Index, Brand Finance

Although Ukraine’s visibility and influence remain significantly higher than before the full-scale invasion, its overall reputation has reverted to its 2021 levels following initial improvements. This regression reflects deteriorations in several key areas, including business and trade, cultural heritage, governance, science and education, as well as people and values.

NATION BRANDS INDEX BY ANHOLT-IPSOS

In one of the most reputable country brand rankings, the Nation Brands Index 2023²², Ukraine was ranked 57th out of 60, down 10 places from the previous year. Prior to the full-scale invasion, Ukraine consistently maintained its position within the 41st to 48th range, (Figure 23).

Ukraine’s position in the Anholt-Ipsos Nation Brands Index in 2017-2023

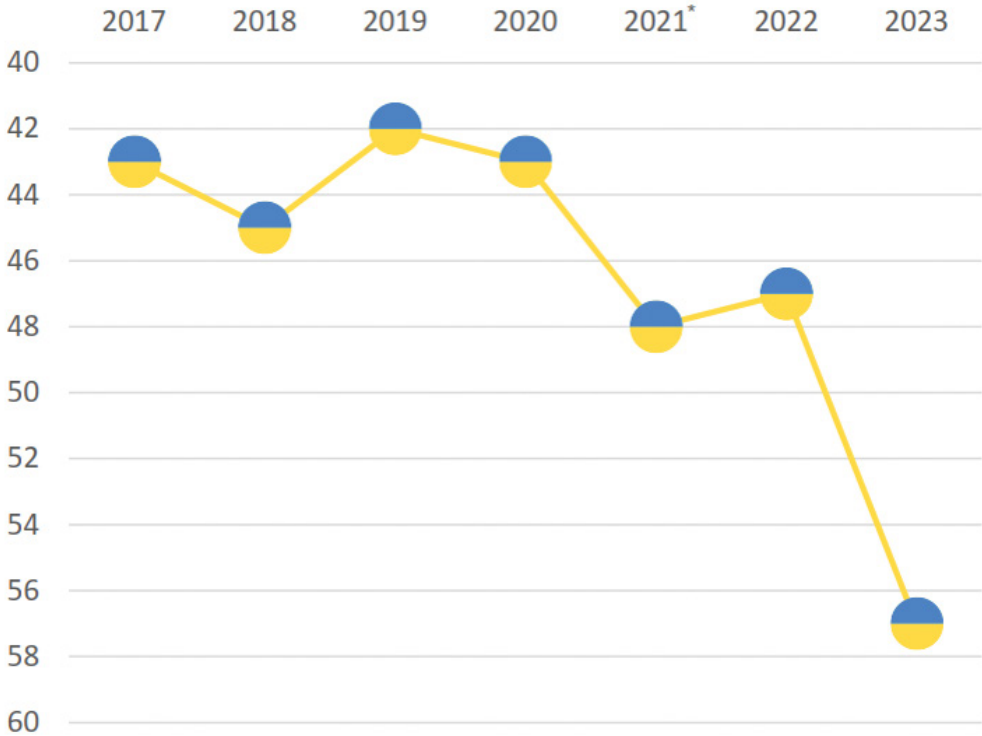


Figure 23: Dynamics of Ukraine’s position in the Anholt-Ipsos Nation Brands Index in 2017-23

Source: Nation Brands Index, Anholt-Ipsos

²² Nation Brands Index 2023, Anholt-Ipsos, <https://www.ipsos.com/sites/default/files/ct/news/documents/2023-10/NBI-2023-Press-Release-Supplemental-Deck-December-23.pdf>

The notable fall in Ukraine’s position in the Nation Brands Index 2023, to 57th out of 60, primarily reflects enhancements in the world’s perception of other countries rather than a significant deterioration towards Ukraine itself. In fact, Ukraine’s overall perception score decreased by a mere 0.07 points, a minor change for such an index. The most substantial decline in Ukraine’s image was observed in the “Tourism” parameter, a direct consequence of the ongoing war. Additionally, there has been a slight decline in perceptions related to “Governance” and “People”, affecting the country’s reputation in terms of the desirability of friendships or employment relations with Ukrainians. At the same time, Ukraine’s investment attractiveness and export potential have increased compared to last year (Figure 24).

Dynamics of Ukraine’s indicators in the Anholt-Ipsos Nation Brands Index 2023

		Global Average**	Ukraine
Overall NBI		+0.90	-0.07
Exports		+1.32	+0.69
Governance		+0.49	-0.88
Culture		+0.69	+0.01
People		+0.75	-0.34
Tourism		+0.24	-1.47
Immigration and Investment		+1.90	+1.55

Figure 24: Dynamics of Ukraine’s indicators in the Anholt-Ipsos Nation Brands Index 2023

Source: Nation Brands Index 2023, Anholt-Ipsos

U.S. NEWS BEST COUNTRIES RANKING

According to the Best Countries Ranking by U.S. News²³, the global community in 2023 considered Ukraine the 10th most influential country in the world. Overall, Ukraine ranked 68th out of 87, down six places from last year.

Due to ongoing war on its territory, Ukraine received the lowest scores in categories such as happiness, quality of life, security, political and economic stability, and attractiveness for living, scoring “0” in each of these areas.

Continuing from the previous year, Ukraine maintained its 14th place in the Power category, which assesses a country’s political, economic, and military significance in the global arena. Notably, Ukraine improved its standing in military power and political influence, ranking 6th and 10th, respectively. Furthermore, the country saw a rise in its ratings for cultural prestige (38th place), social dynamism (38th place), and animal rights (37th place), compared to its 2022 standings.

²³ U.S. News Best Countries Ranking 2023, <https://www.usnews.com/news/best-countries/rankings>

KEY FACTS ABOUT UKRAINE'S GLOBAL PERCEPTION IN 2023

- Ukraine remained in the top twenty most famous countries, becoming the 16th most familiar country in the world.
- The prolonged war has adversely impacted several aspects of Ukraine's reputation, including business environment, cultural heritage, sustainable development, political stability, security, and tourism sectors. Despite these challenges, Ukraine has solidified its status as a significant player on the international stage. By the year's end, it consistently ranks within the top 15% of nations globally in terms of international influence.
- Coverage of Ukraine in international news media has decreased by 20%, and on social networks, it has fallen by more than 40%. Simultaneously, the range of topics through which the world learns about Ukraine has significantly broadened. In this diverse media landscape, the proportion of articles focused on hostilities and the aftermath of attacks has decreased, making room for an expanded coverage of cultural and sports-related news.
- Despite clear signs of "compassion fatigue," which resulted in the war in Ukraine becoming the world's most deliberately avoided topic in news media consumption, Ukraine still emerged as the fourth most followed country in terms of news by people worldwide in 2023.
- For the second consecutive year, war remains the primary association with Ukraine among foreigners. However, in several countries across Asia, Africa, and the Middle East, people tend to view Ukraine more through the perspectives of innovation, agricultural and industrial potential, culture, sports, and personal sentiments.
- In 2023, global surveys observed a slight decrease in foreign support for different forms of aid to Ukraine. Despite this downturn, the majority of individuals in Western societies continue to support Ukraine, with certain forms of assistance even rising in popularity. Consequently, support within the Western world for Ukraine's accession to the EU and NATO saw an increase throughout the year.

- Global media coverage highlighting Ukraine's key reputational attributes remains relatively limited. However, in 2023, the portrayal of Ukraine's image characteristics in English-language media saw an increase, rising from 8% to 10%. Heroism and democracy emerged as the most prevalent brand attributes associated with Ukraine.
- Google search activity on the topic of Ukraine has returned to levels seen before the start of the full-scale invasion. However, the diversity of Ukraine-related trending search topics indicates that global interest in the country extends beyond the context of the war.

MEET THE TEAM



Tamara NOVOSELSKA

Head of Research and Analysis
at BRAND UKRAINE

"I believe in the ability of Ukrainians to create a powerful nation brand. I am confident that this research will guide all those working on Ukraine's image in a unified direction."



Marina DADINOVA

Deputy Head and Head of Programs
at BRAND UKRAINE

"The global perception of Ukraine is crucial in garnering international support for our fight for independence and freedom against Russian aggression. This report is our contribution to adopting a data-driven approach in the development of Ukraine's strategic communications and enhancing its global brand."

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