Reactions to the Ukraine crisis

Understanding concerns, attitudes, and reactions

GWI.

Contents

Methodology

All figures in this report come from GWI's online research among internet users aged 16-64, which reflect the online populations of each market.

We included 21 countries in this research, chosen to ensure a wide geographic perspective on events, but they also reflect where we could collect robust samples as quickly as possible. We chose some European countries based on their geographical proximity to events.

All respondents had previously completed our Core survey, meaning users with access to GWI Core can compare questions across the two studies.

In some markets low internet penetration means online populations tend to be younger, more affluent, and better educated than the total population.

This report also contains references to Covid-19 / Black Lives Matter research that's available separately.

For more details, check out our FAQs and the freely available data on the platform.

Introduction

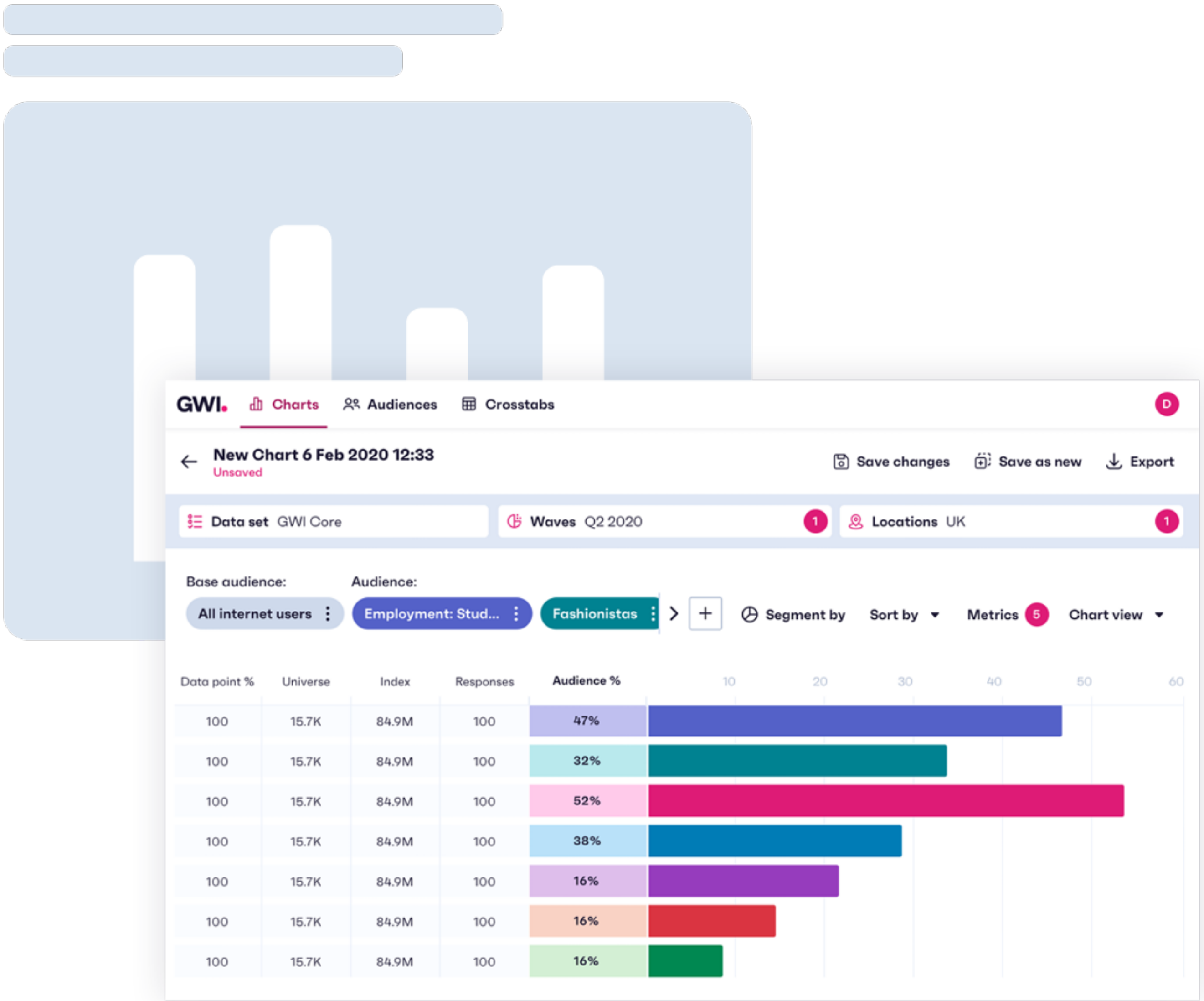
People across the world are facing another crisis - one which, for many, will feel every bit as unprecedented as the coronavirus pandemic.

To understand how the ongoing conflict in Ukraine is impacting attitudes, concerns, and behaviors, GWI has fielded research in 21 markets globally.

Collected between March 3-14, the survey data sheds light on how people are feeling, the types of responses they want to see from organizations, and how the conflict is impacting their day-to-day lives and expectations.

The findings are freely available to all.

We hope this research will be helpful in this unsettling time.



Key insights

Concerns about the conflict

Virtually all consumers are concerned about some aspect of the conflict. This is not a local issue, as these fears are distributed right across the world.

The biggest concerns are global escalation, nuclear weapons, and disputed territories elsewhere, but it's nuclear weapons that prompt the most serious worries of all.

Perceived personal impact

Consumers are worried about political factors, but the cost of living is a bigger immediate concern than threats to democracy or political unions.

Many will look to cut back spending, if they haven't already done so.

Expected brand actions

There's great desire for governments and brands to respond, but consumers prefer humanitarian actions to more aggressive moves like withdrawing investments or enacting sanctions.

Compared to the Black Lives Matter protests in 2020, consumers are less focused on brands showing support through social posts or statements, and are instead looking for them to take meaningful actions.

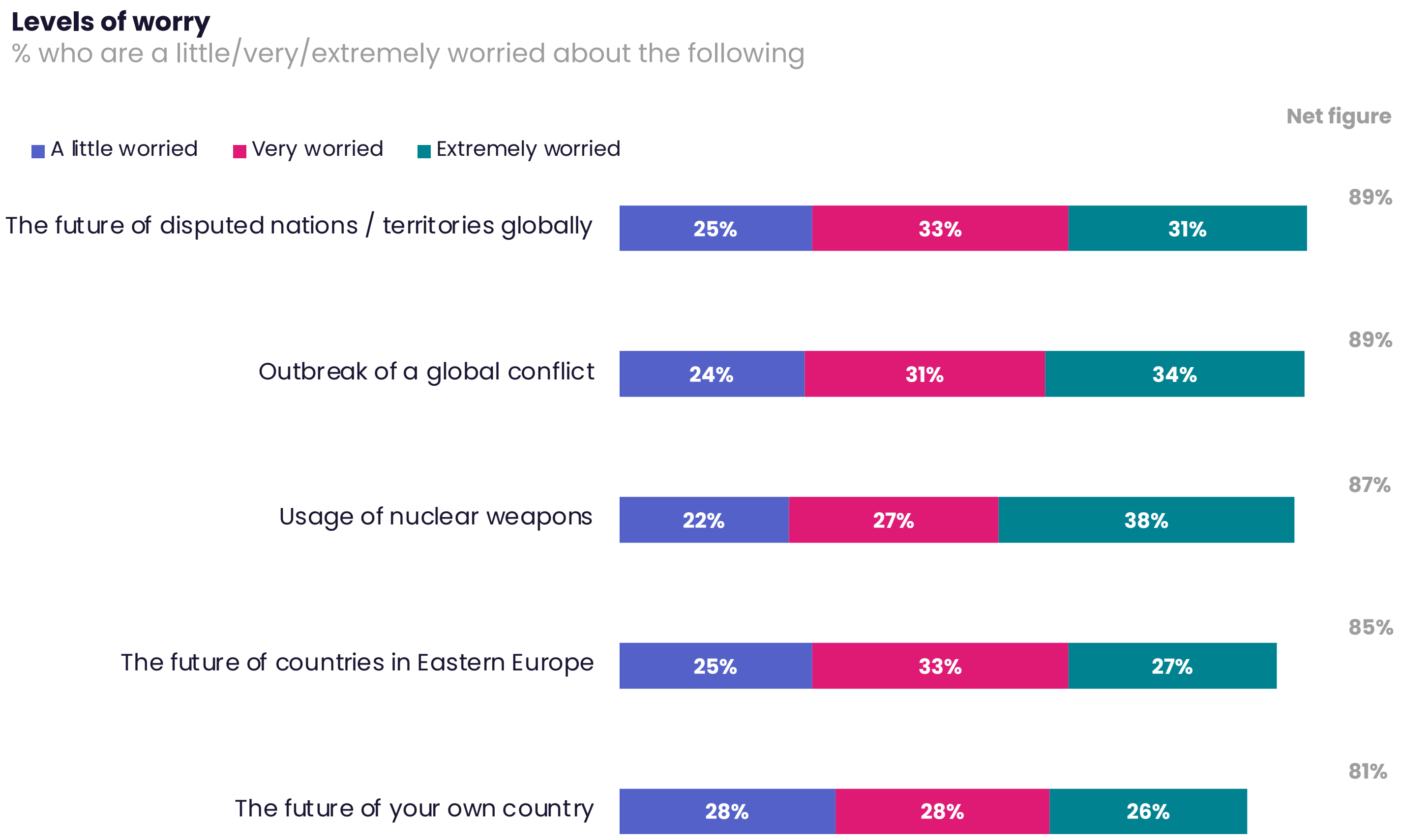
Media and trust

Similar to the early stages of the pandemic, in times of crisis more consumers turn to established media. Social media is used a lot but has much lower levels of trust, especially outside younger age groups. Video is central to how consumers engage with events.

There's big demand for international channels and sources, while the social platforms central to following the conflict are YouTube, Twitter, and Meta's platforms.

Concerns on the conflict

Nuclear weapons are the biggest source of serious worry



Concerns about the conflict are universally high.

The biggest concern felt in relation to the conflict is the outbreak of a global conflict, though the biggest cause of *extreme* concern is the potential use of nuclear weapons.

It's worth stressing how quickly nuclear concern has developed. In November 2021, only 10% of consumers surveyed across 9 countries were generally concerned about nuclear weapons at that time – putting it at the bottom of a list of 13 factors.

Italy, Spain, and Romania show the highest levels of concern for the future of their own country.

Source: Research on the Ukrainian conflict **Base:** 20,428 internet users aged 16-64 in 21 markets

Nearly 4 in 10 think escalation is very likely

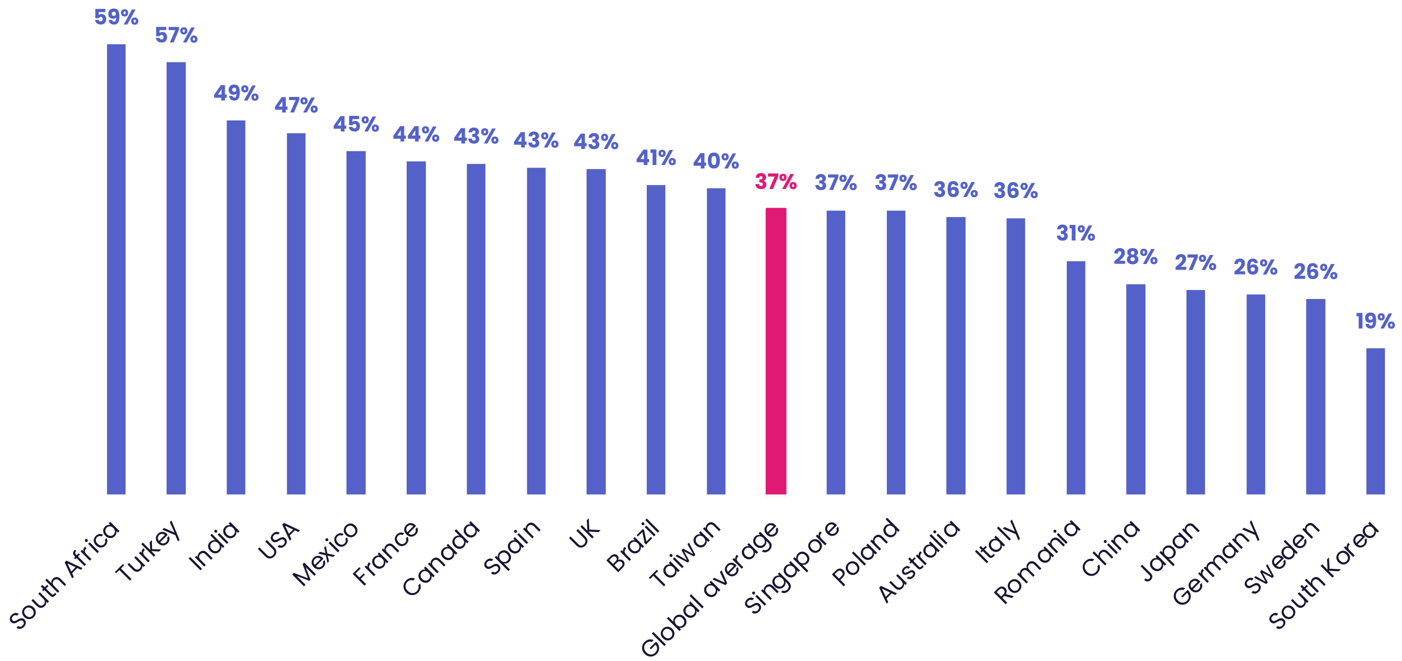
The most concerned countries aren't necessarily the closest ones to the fighting. Of the top 5 countries most concerned about escalation of the conflict, none are in Europe.

As the internet population is younger on average in South Africa, Turkey, and India, these results are more likely down to the impact of age, with younger consumers more apprehensive of what the future might hold.

41% of 16-24s globally think escalation is likely, compared to 34% of 55-64s.

Likelihood of future events

% who think it's very/extremely likely the conflict will escalate to involve more countries

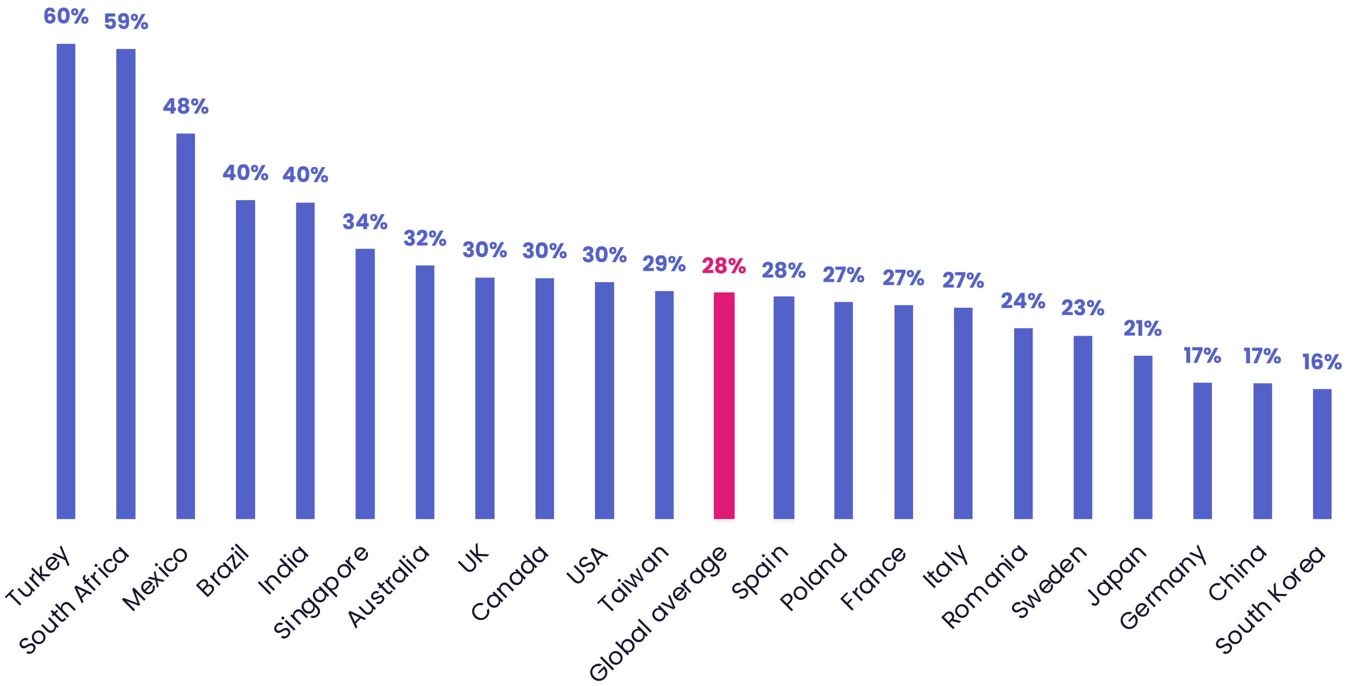


Source: Research on the Ukrainian conflict **Base:** 20,428 internet users aged 16-64 in 21 markets

3 in 10 think it’s very likely nuclear weapons will be used

Likelihood of nuclear weapons usage

% who think it’s very/extremely likely nuclear weapons will be used in the future



Concern about nuclear weapons is most pronounced among the young and, by extension, countries with young online populations. It’s not limited to countries that have nuclear weapons either.

32% of 16-24s think it’s likely nuclear weapons will be used in the future, compared to 22% of 55-64s.

This means that concern about usage of nuclear weapons is lower than a general worry about escalation.

In both cases, there may be an element of older age groups remembering flashpoints in the Cold War, whereas younger generations lack that kind of reference point.

Source: Research on the Ukrainian conflict **Base:** 20,428 internet users aged 16-64 in 21 markets

NATO countries more likely to anticipate troop involvement

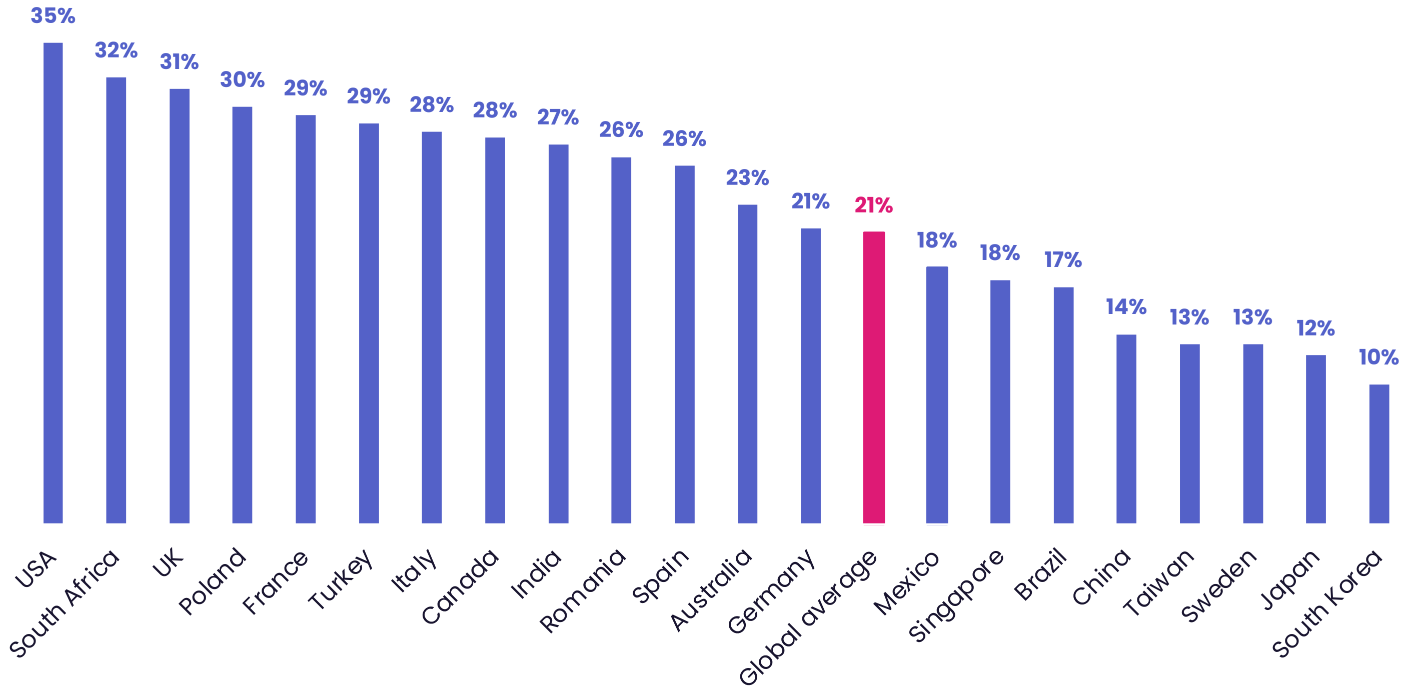
The countries most likely to think their own troops will get involved are almost exclusively NATO countries.

Only 13% in Sweden think their country will become directly involved, which puts it in line with APAC countries like Taiwan, Japan, South Korea, and China.

As we saw with our Covid research in 2020, consumers are more likely to worry about a general threat than a personal one. Consumers believe that the conflict could escalate globally (or that the pandemic will have an impact on the world at large), but they tend to think the impact on their own country will be reduced.

Likelihood of own country involvement

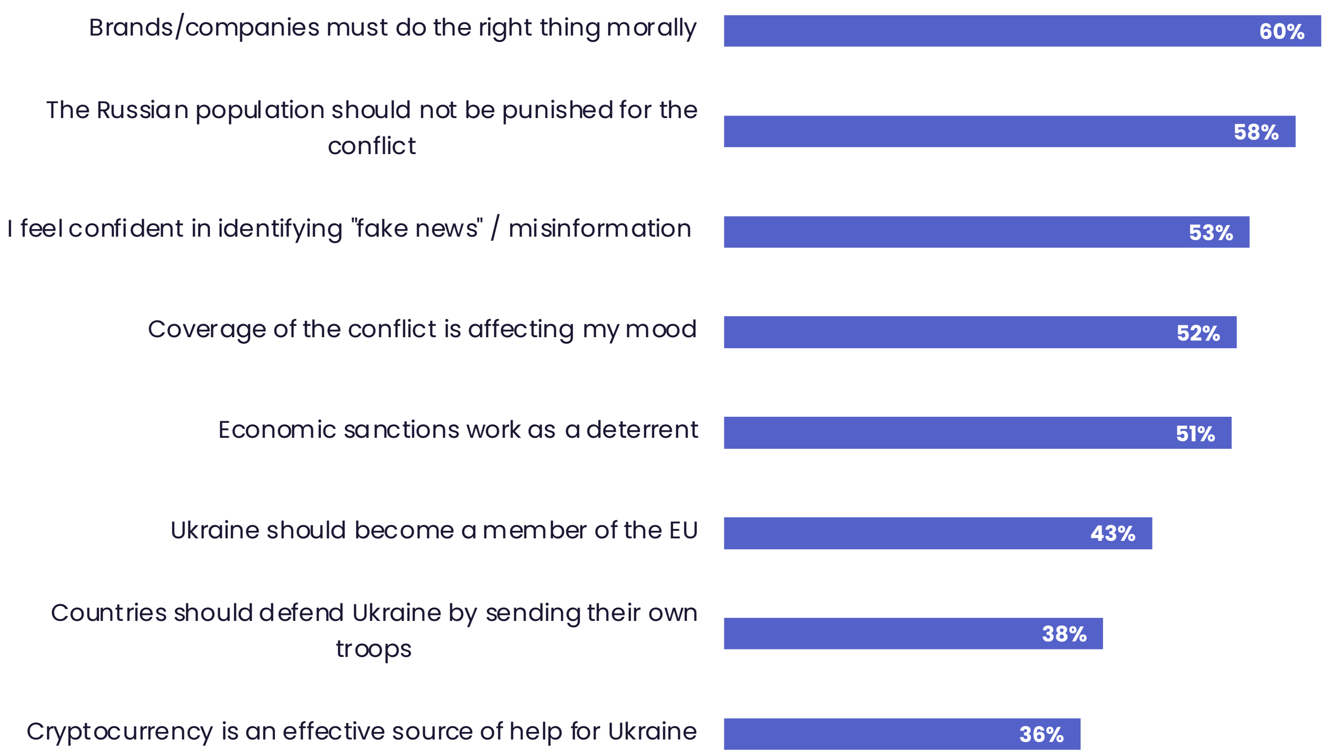
% who think it's very/extremely likely forces from their country will become directly involved



Source: Research on the Ukrainian conflict **Base:** 20,428 internet users aged 16-64 in 21 markets

Consumers want brands to do the right thing

Attitudes on the conflict
% who somewhat/strongly agree with the following



Around 6 in 10 agree that the Russian population should not be punished for the conflict, illustrating the challenge facing countries looking to respond, though these figures are pushed up by China.

Close to 2 in 5 people think countries should defend Ukraine by sending their own troops. This sentiment is strongest in some of the countries which are geographically closest, such as Turkey (46%) and Poland (43%). Neighboring countries are also more likely to believe in the power of sanctions as a deterrent.

69% in Poland also believe Ukraine should become a member of the EU.

Confidence around identifying misinformation peaks among the 25-34s. 16-24s are actually less likely to feel they can recognize fake news.

Source: Research on the Ukrainian conflict **Base:** 20,428 internet users aged 16-64 in 21 markets

Perceived personal impact

Finances and energy are the biggest concerns

Oil and gas concerns are biggest in European countries now facing supply challenges, especially France, Italy, and Spain.

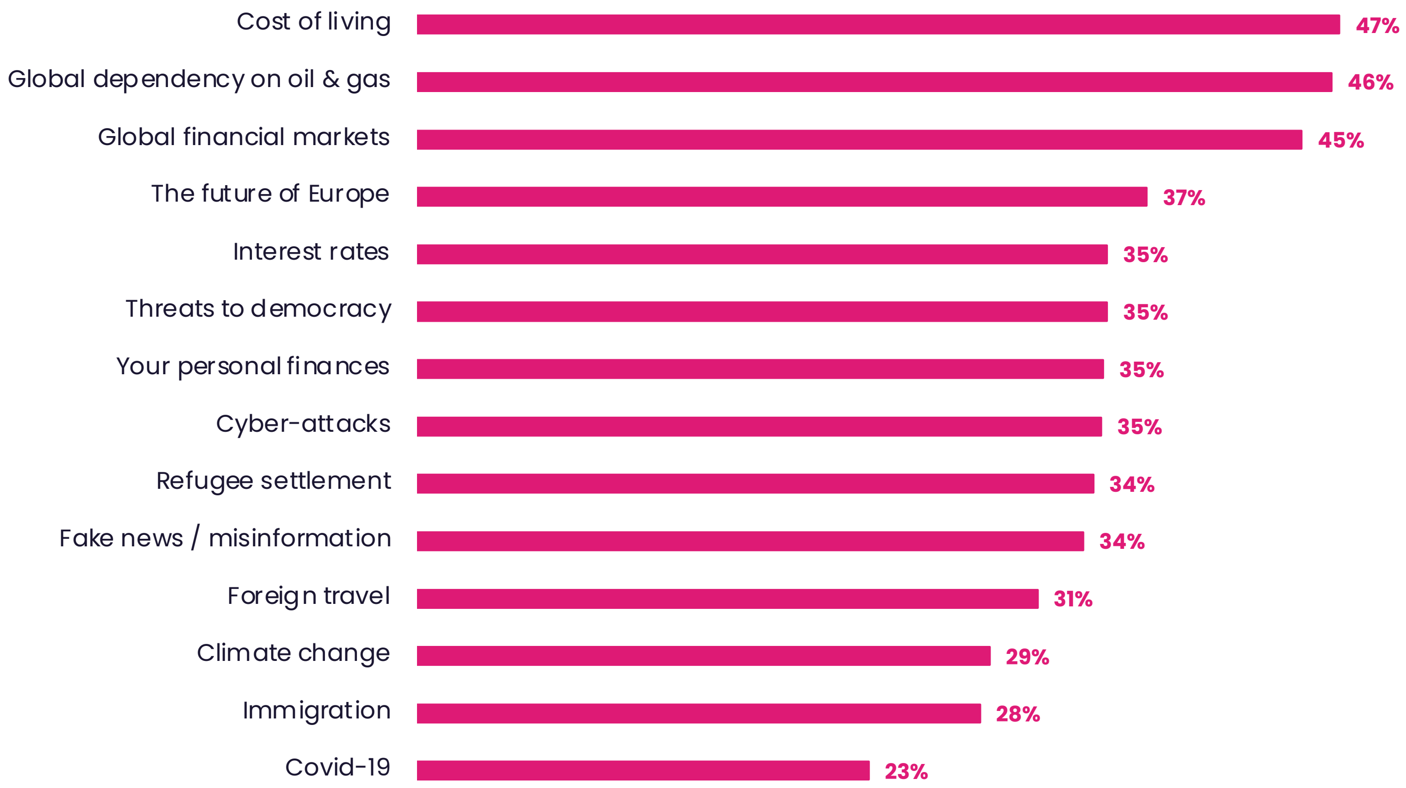
Older consumers are more likely to worry about the international element of the conflict, being more concerned about refugee settlement and immigration. Cyber-attacks are likewise more of a worry among older consumers.

For a travel industry only just recovering from Covid, it will be concerning that 31% globally are more worried about foreign travel.

Just over 1 in 5 say the conflict has made them less concerned about Covid-19, which highlights how this conflict has replaced the pandemic as the big issue in many people's minds.

Changes in levels of worry

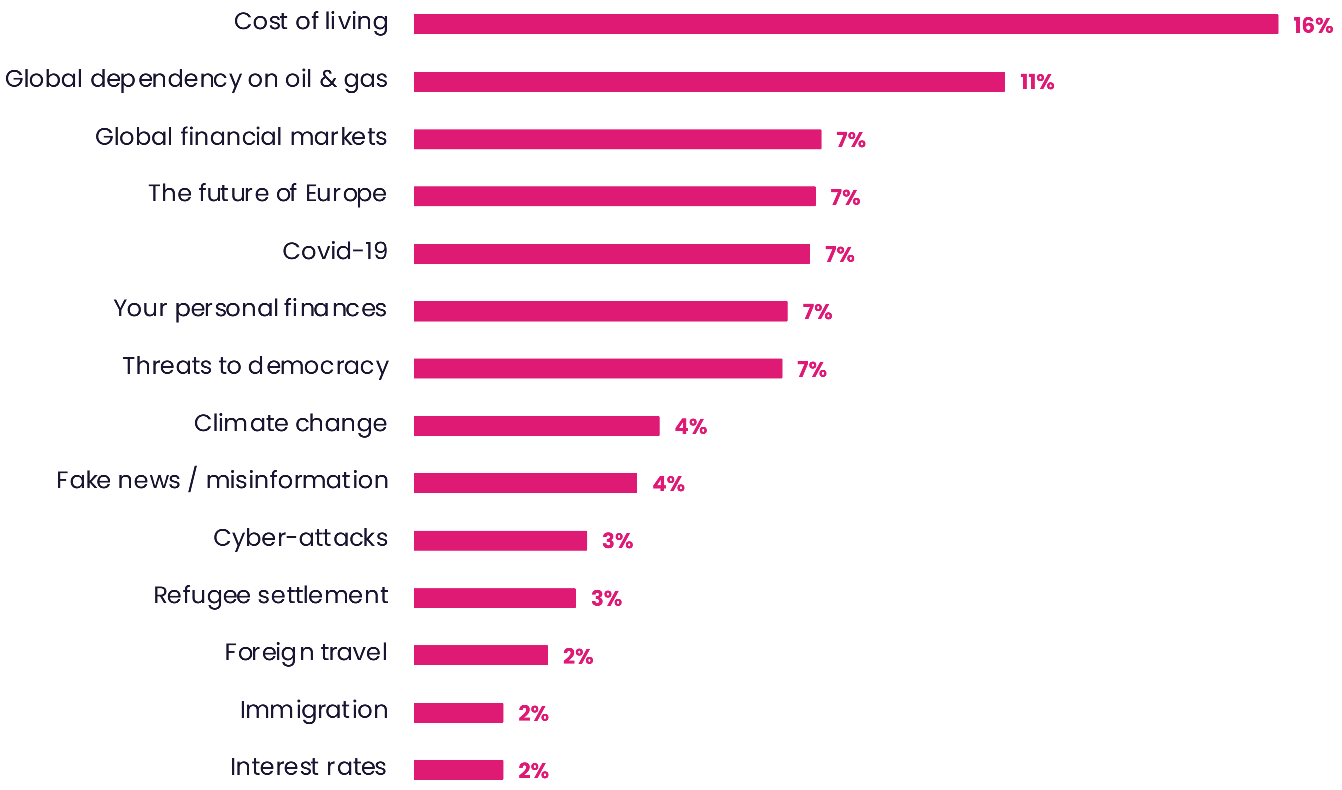
% who have become more worried about the following



Source: Research on the Ukrainian conflict **Base:** 20,428 internet users aged 16-64 in 21 markets

Cost of living is consumers' biggest priority

Biggest increase in worry
% who say the following has increased their levels of worry the most



Source: Research on the Ukrainian conflict **Base:** 20,428 internet users aged 16-64 in 21 markets

By asking respondents to select the single specific concern that worries them most, we get a clearer picture of where their priorities are.

Here we have two interesting and divergent responses. On the one hand, consumers are most concerned about their personal situation as 16% say that cost of living is their biggest concern. But 7% choose the future of Europe and threats to democracy, which shows that some people are motivated by more abstract, political issues.

The pattern you see on the left generally holds across income groups. The most noticeable difference between high and low earners is the former group being more concerned about global financial markets.

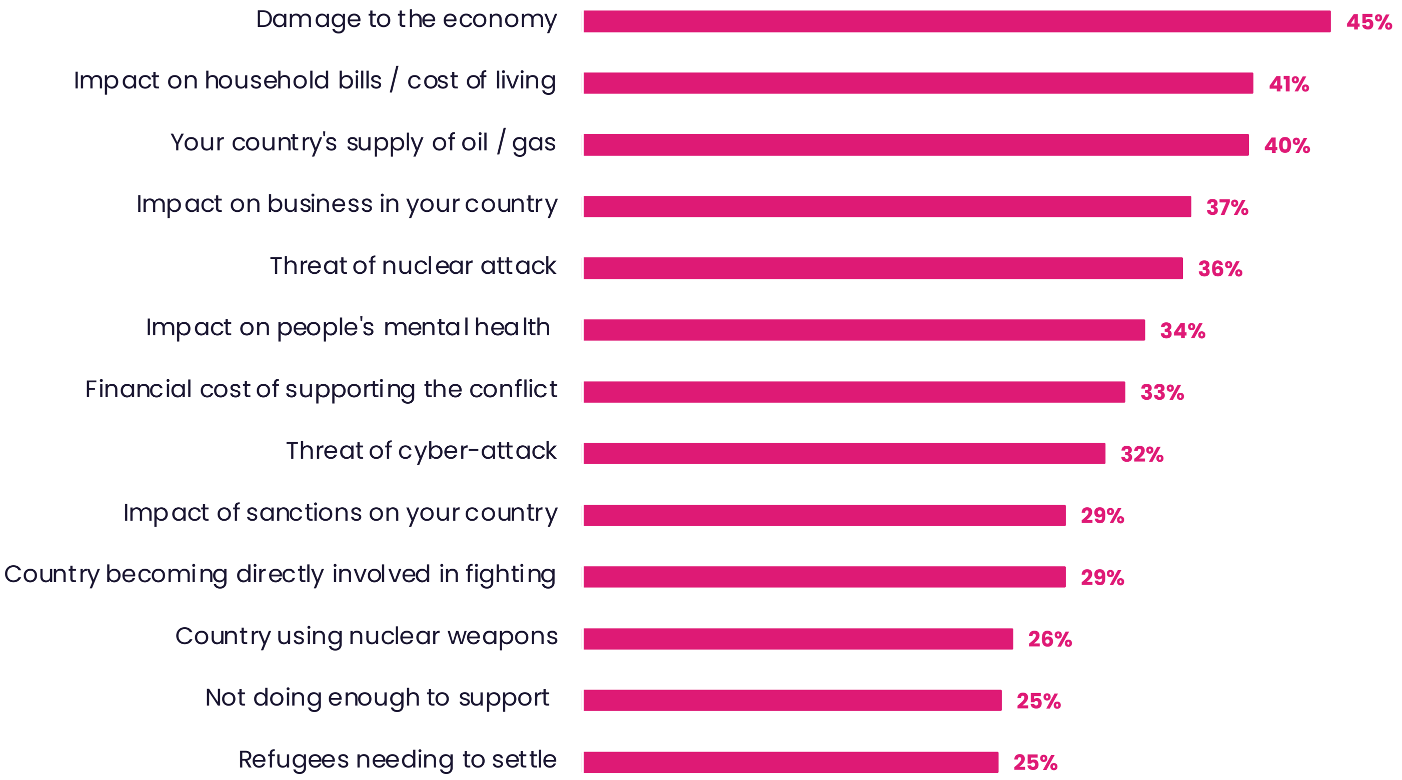
Economic concerns outweigh military threats at country level

Even though worries about escalation and nuclear attack are high, this is fundamentally a crisis that has consumers looking at their personal finances above all else. Their most existential concerns are potential damage to their country's economy and businesses, its supply of energy, and their own personal finances.

Younger groups and consumers in South Africa, Turkey, and Romania are more likely to feel concerned about the impact on mental wellbeing.

Concerns for own country

% who are very concerned about the following for their own country



Source: Research on the Ukrainian conflict
Base: 20,428 internet users aged 16-64 in 21 markets

Top 3 concerns by country

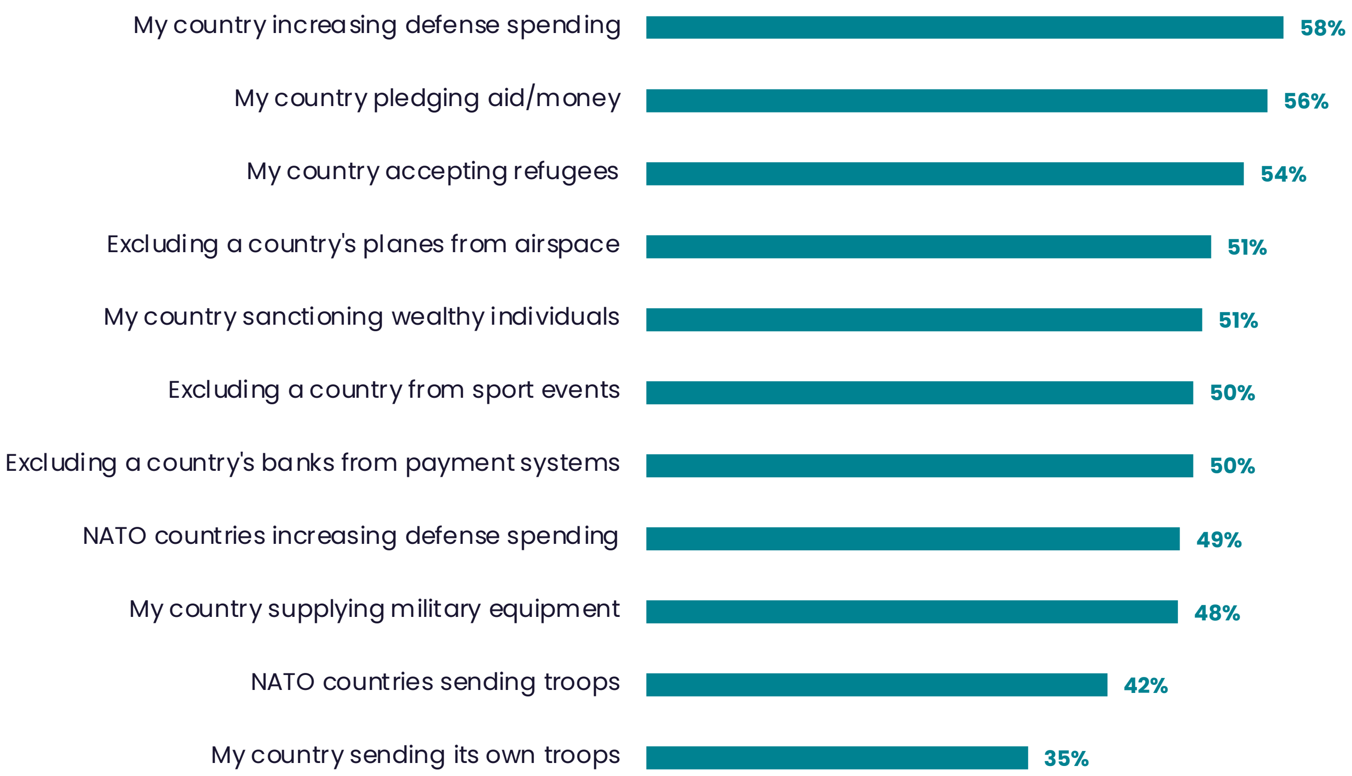
Country	1	2	3
Australia	Household bills / cost of living	Supply of oil and gas	Damage to the economy
Brazil	Damage to the economy	Household bills / cost of living	Impact on business
Canada	Household bills / cost of living	Damage to the economy	Impact on people's mental health
China	Damage to the economy	Impact on business	Supply of oil and gas
France	Household bills / cost of living	Damage to the economy	Supply of oil and gas
Germany	Supply of oil and gas	Household bills / cost of living	Damage to the economy
India	Damage to the economy	Supply of oil and gas	Threat of nuclear attack
Italy	Household bills / cost of living	Damage to the economy	Supply of oil and gas
Japan	Supply of oil and gas	Damage to the economy	Household bills / cost of living
Mexico	Damage to the economy	Threat of nuclear attack	Household bills / cost of living
Poland	Household bills / cost of living	Damage to the economy	Impact on business
Romania	Damage to the economy	Household bills / cost of living	Your country becoming directly involved in fighting
Singapore	Household bills / cost of living	Damage to the economy	Supply of oil and gas
South Africa	Damage to the economy	Household bills / cost of living	Supply of oil and gas
South Korea	Damage to the economy	Supply of oil and gas	Impact on business
Spain	Household bills / cost of living	Damage to the economy	Supply of oil and gas
Sweden	Household bills / cost of living	Damage to the economy	Threat of nuclear attack
Taiwan	Damage to the economy	Supply of oil and gas	Household bills / cost of living
Turkey	Damage to the economy	Household bills / cost of living	Impact on business
UK	Household bills / cost of living	Supply of oil and gas	Threat of nuclear attack
USA	Damage to the economy	Household bills / cost of living	Supply of oil and gas

Source: Research on the Ukrainian conflict **Base:** 20,428 internet users aged 16-64 in 21 markets

Expected brand actions

Consumers favor charitable/defensive actions

Support for conflict responses
% who support/strongly support doing the following in times of conflict



The most supported measures are fundamentally defensive (increasing defense spending) or charitable (pledging aid, accepting refugees).

More aggressive moves – like sanctions or supplying equipment – are less popular, though still popular overall.

In China, India, Sweden, and Turkey, increasing defense spending is the most popular move.

Sanctioning wealthy individuals is supported by 75% in the UK, versus 36% in South Africa.

Source: Research on the Ukrainian conflict **Base:** 20,428 internet users aged 16-64 in 21 markets

Consumers think international bodies should do more

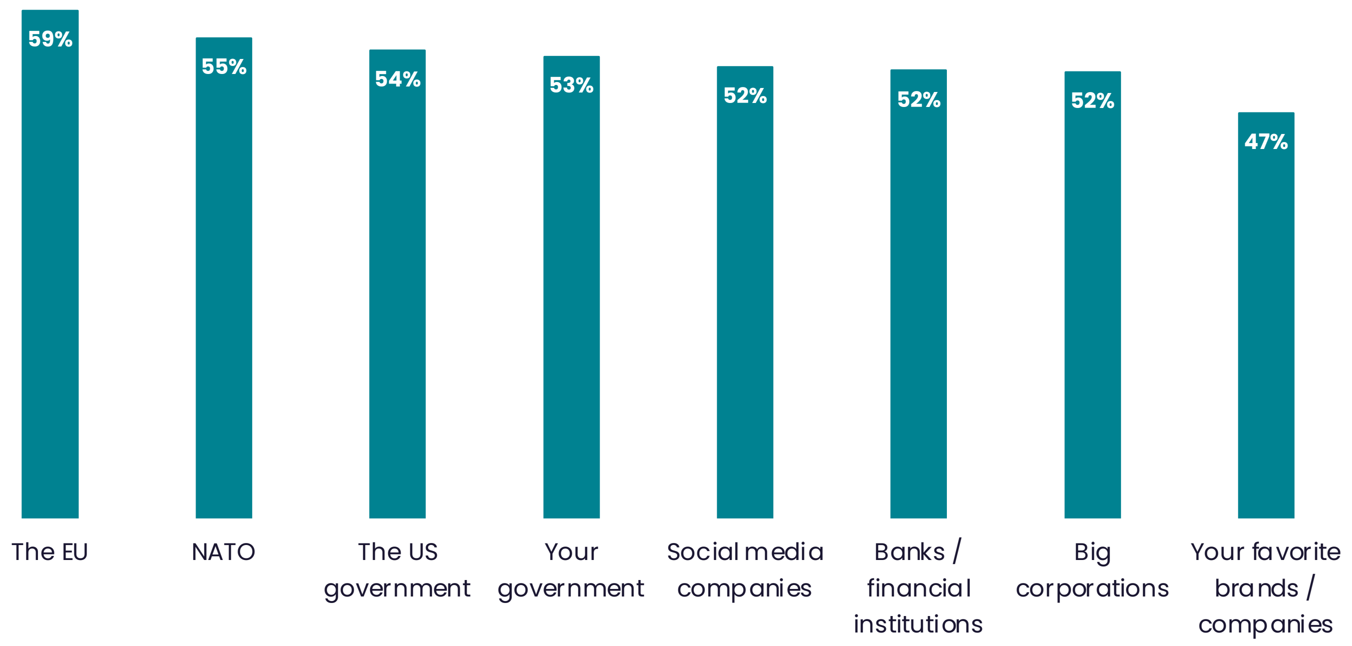
The organizations that consumers feel should be doing more roughly align with their level of geopolitical power.

Virtually all countries believe the EU or NATO should be doing more, though a few countries in APAC (e.g. India, South Korea, and Taiwan) expect more from the US government, perhaps because they view the conflict as a prelude to something happening in their own region.

The story here is broadly similar to what we found in our 2020 Covid-19 research. At that time, we used a different metric (approval) but, similarly to now, we found that consumers had higher expectations on governments than they did private businesses.

Responses from organizations

% who think the following should do more/much more in response to the conflict



Source: Research on the Ukrainian conflict **Base:** 20,428 internet users aged 16-64 in 21 markets

Most consumers want brands to respond

The majority of consumers think brands should take action, though consumers think it largely depends on the circumstances involved.

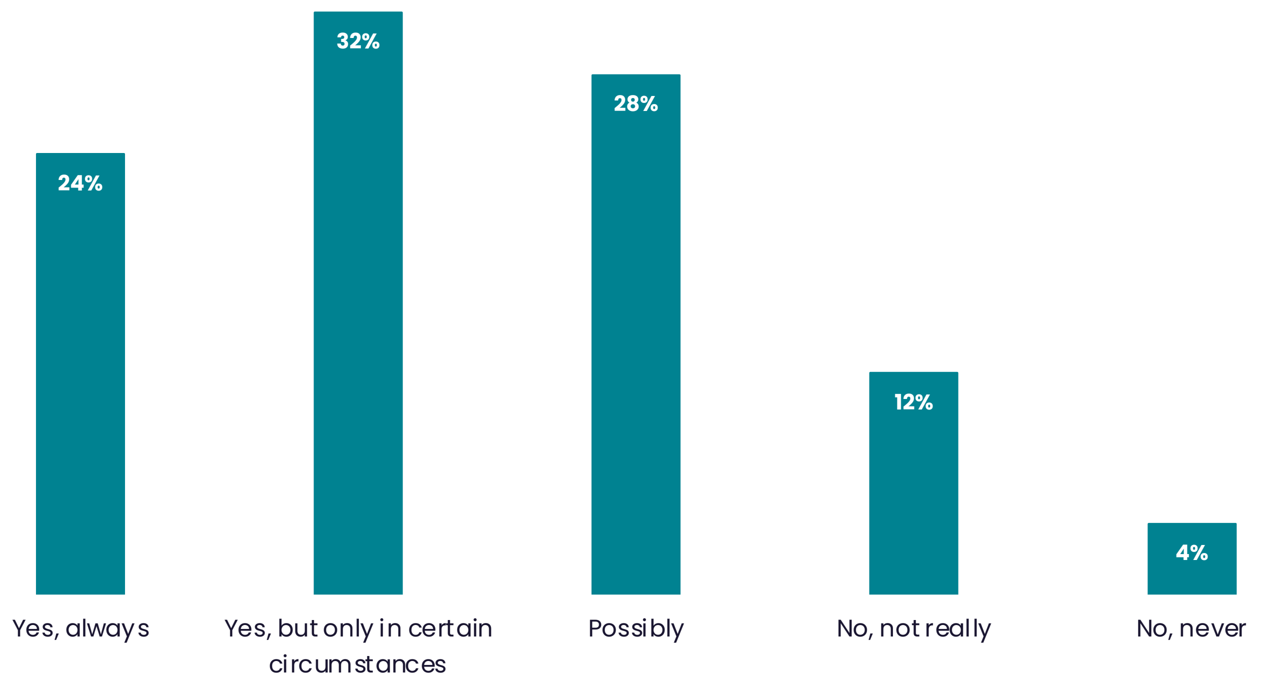
Expectation of brands taking action correlates with age. 60% of 16-24s think brands should take action, compared to 51% of 55-64s.

The urge for brands to do something takes hold in some surprising places, with consumers in Turkey, Spain, and Brazil clamoring the most for brands to respond, while those in the US and Germany are less insistent.

It shows how proximity to the conflict is not the be-all and end-all of how consumers respond.

Expectations for brands responding

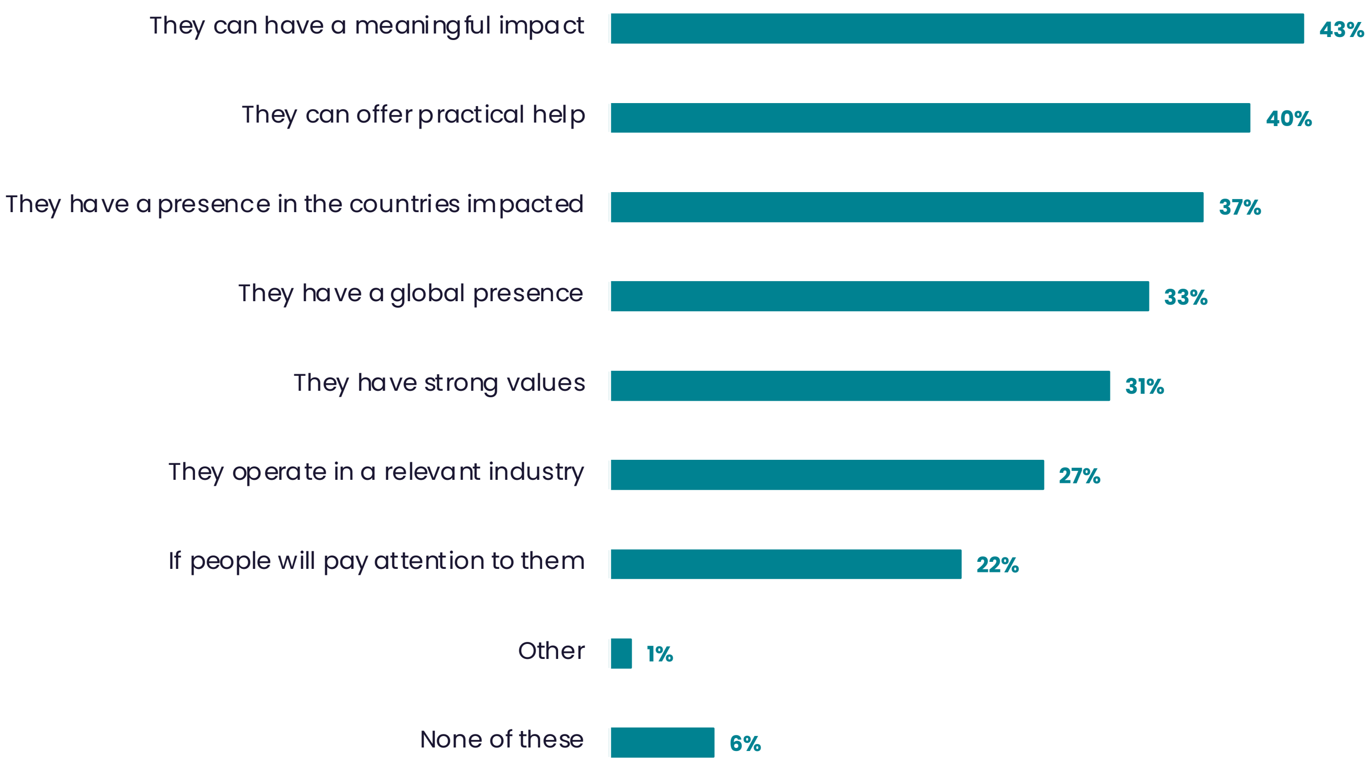
% who say the following when asked if brands/companies should take action and make their views known



Source: Research on the Ukrainian conflict **Base:** 20,428 internet users aged 16-64 in 21 markets

Symbolic acts can be just as important as practical ones

Reasons for a brand to respond
% who think brands should respond to a conflict if...



Consumers are most eager to see a meaningful impact from brands, followed by practical help.

Consumers are less fussed about brands having strong values or operating in a relevant industry to get involved, which underlines how they're keen for brands of all stripes to contribute.

"Having a meaningful impact" could be interpreted in several ways, but it shows how contributions can come from everywhere and anywhere. Even if a move is not strictly practical, consumers may still value the symbolism of a brand being seen to do the right thing.

Source: Research on the Ukrainian conflict
Base: 20,428 internet users aged 16-64 in 21 markets

Consumers want brands to be charitable, avoid empty statements

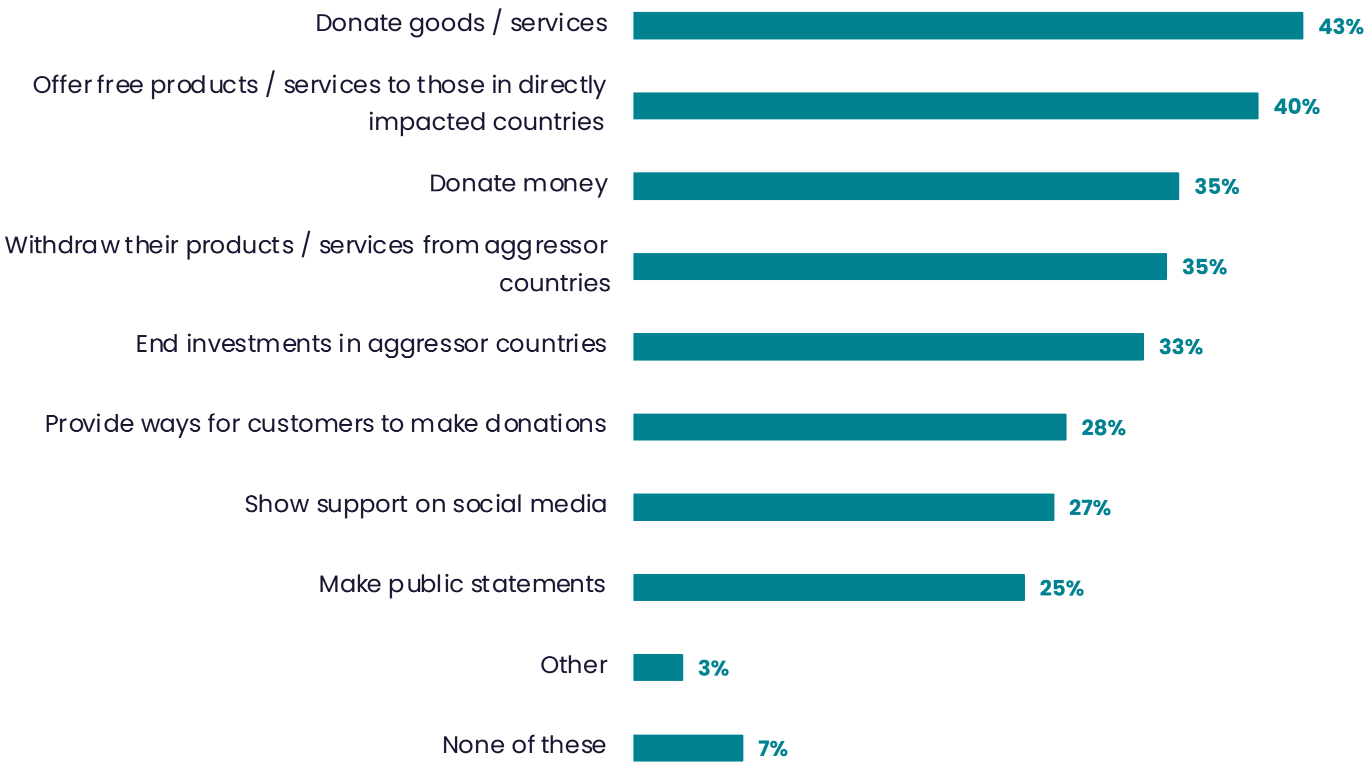
As we saw with their personal responses to the conflict, consumers value charitable acts above all else. They most want brands to donate or to offer their services to those in need. Withdrawing products or ending investments are less popular, though countries close to the conflict (Poland, Romania, Sweden, Turkey) are an exception here.

The least desired responses are making public statements or showing support on social media. This is very different to what we saw in the aftermath of the Black Lives Matter protests in 2020, when consumers wanted brands to post on social media much more.

The bottom line is that times have changed and this is a very different crisis, where different rules apply.

Desired brand responses

% who say brands should do the following in response to conflict



Source: Research on the Ukrainian conflict
Base: 20,428 internet users aged 16-64 in 21 markets

Consumer response is more inward-facing

Personal responses to conflict
% who have personally done the following in response to the current conflict

While consumers aren't as keen on brands making statements on social media, that is what they're personally doing above all else. These figures are skewed by China and India though – in most countries, the main response is to cut spending, which all age groups are doing.

It underlines the fact that to many, this is a personal, financial crisis as much as a global, political one.

In terms of what people would consider doing that they haven't yet done, around 1 in 2 said they would offer their time or expertise to help or would purchase products where donations will be made.

Source: Research on the Ukrainian conflict **Base:** 20,428 internet users aged 16-64 in 21 markets

Media and trust

Established media drawing in viewers

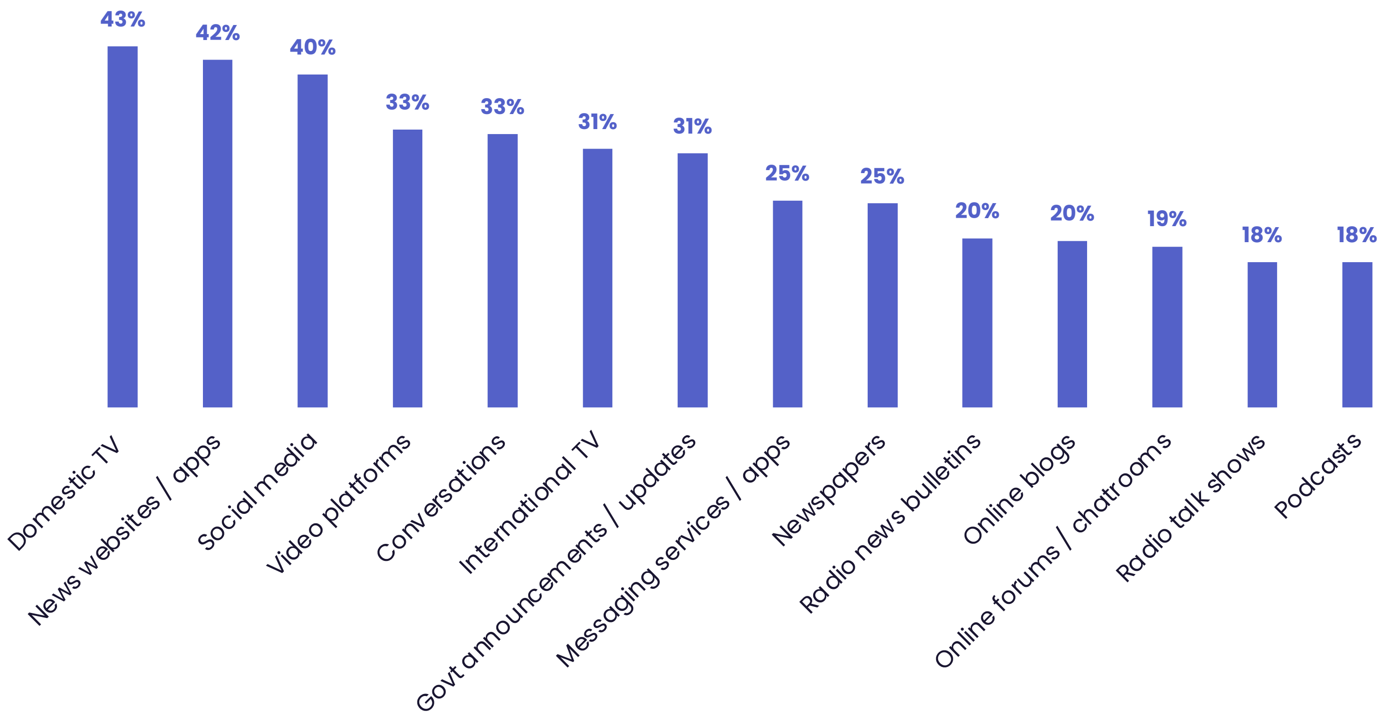
As we found during our Covid research in 2020, in times of crisis more consumers turn to established media, with domestic TV and news websites the most popular channels to follow.

For younger consumers, though, social media platforms are the most-used sources, with 48% of 16-24s selecting this option.

In Poland, conversations (56%) are used almost as much as domestic news (57%) as a source of information. In Romania, conversations with friends/family/colleagues is actually the most popular source of information outright.

Information sources

% who are using the following sources a lot to keep up with the conflict

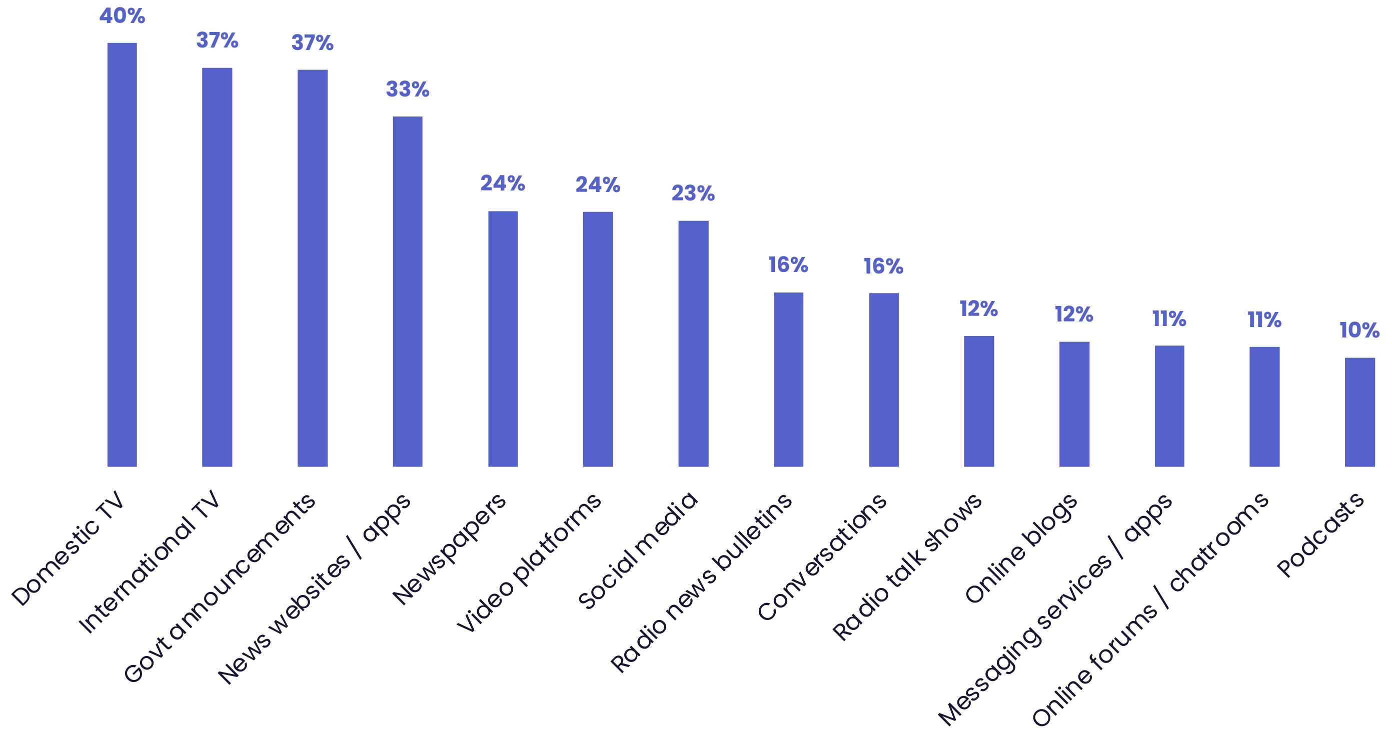


Source: Research on the Ukrainian conflict **Base:** 20,428 internet users aged 16-64 in 21 markets

Established media and governments are the most trusted sources

Trustworthiness of info sources

% who feel the following sources are the most trustworthy sources of information about the conflict



Source: Research on the Ukrainian conflict **Base:** 20,428 internet users aged 16-64 in 21 markets

Even though social media is used more as a news source among younger age groups, they don't trust it as much as other sources like TV coverage and government announcements.

Online news is more trusted across all age groups than newspapers.

One of the striking insights in our research is how much international providers are trusted as a source of news. This could be down to consumers wanting to know the facts "on the ground", or because they're looking to the most credible sources possible and looking beyond their own borders to do so.

In the last couple of years our research has found a growing acceptance of foreign media among consumers. Consumers listen to or watch international genres in music and TV more often, and this may have played a role in increasing interest (and trust) in foreign news during a time of conflict.

Consumption of media doesn't rely on trust

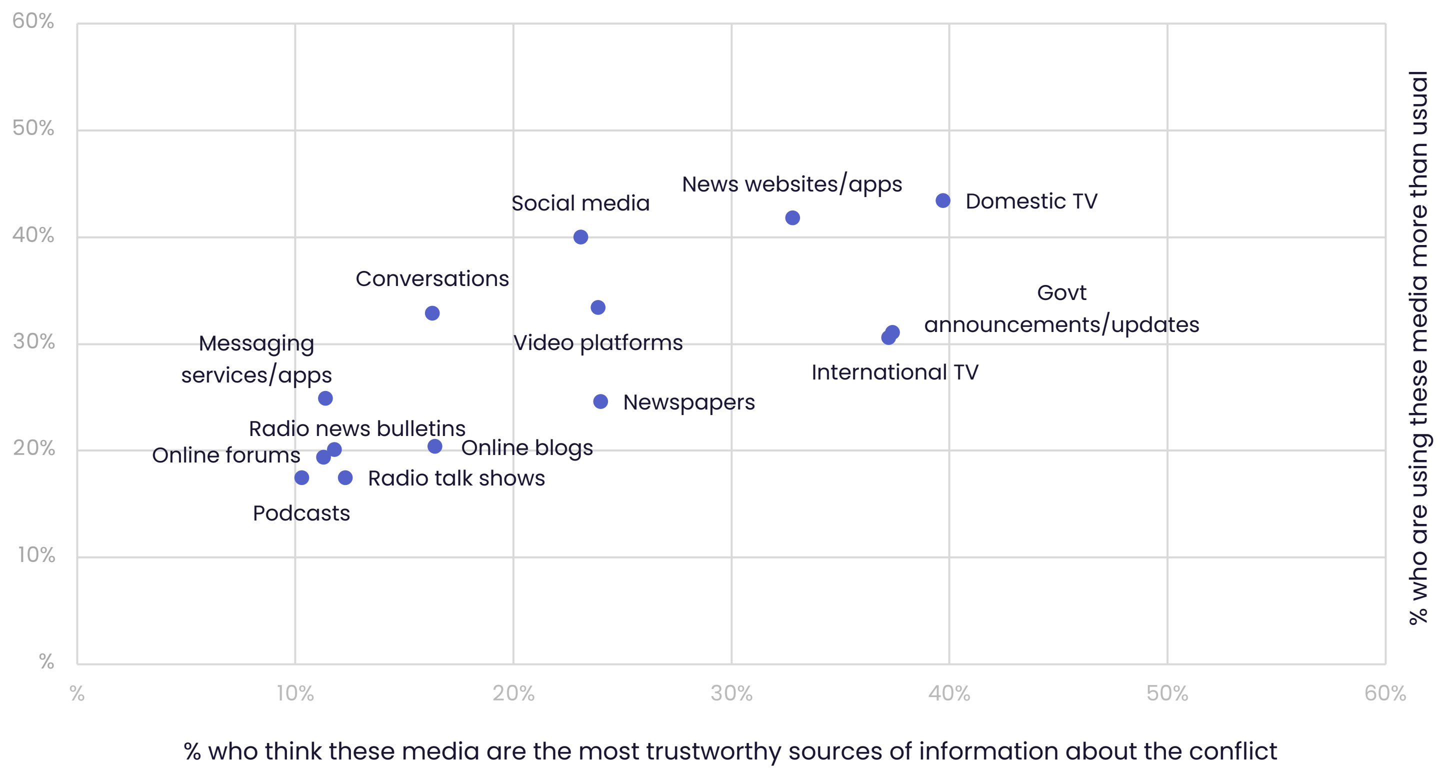
By plotting trust against consumption levels of different news media, we can account for each channel's relative size.

Media types on the right of the chart are proportionally trusted more than they are used; for those on the left, vice versa.

From this we can see that legacy media attracts higher levels of trust, while social media and messaging apps lag behind.

What's most interesting, though, is that the number of consumers who trust international TV and government updates is higher than the number who actually engage with them on a regular basis. Certain media channels enjoy a very good perception in the market during a crisis, but that's still not enough to make them part of readers' daily habits.

Trust vs. consumption of media



Source: Research on the Ukrainian conflict **Base:** 20,428 internet users aged 16-64 in 21 markets

YouTube is the main platform used to follow events

YouTube is the most used platform to follow the conflict in every age group outside China, even among older consumers, where baseline use of Facebook is much higher.

This is a big change from what we observed in our Covid research from 2020 in the US/UK, where Facebook was used more than YouTube as a source of information across all age groups.

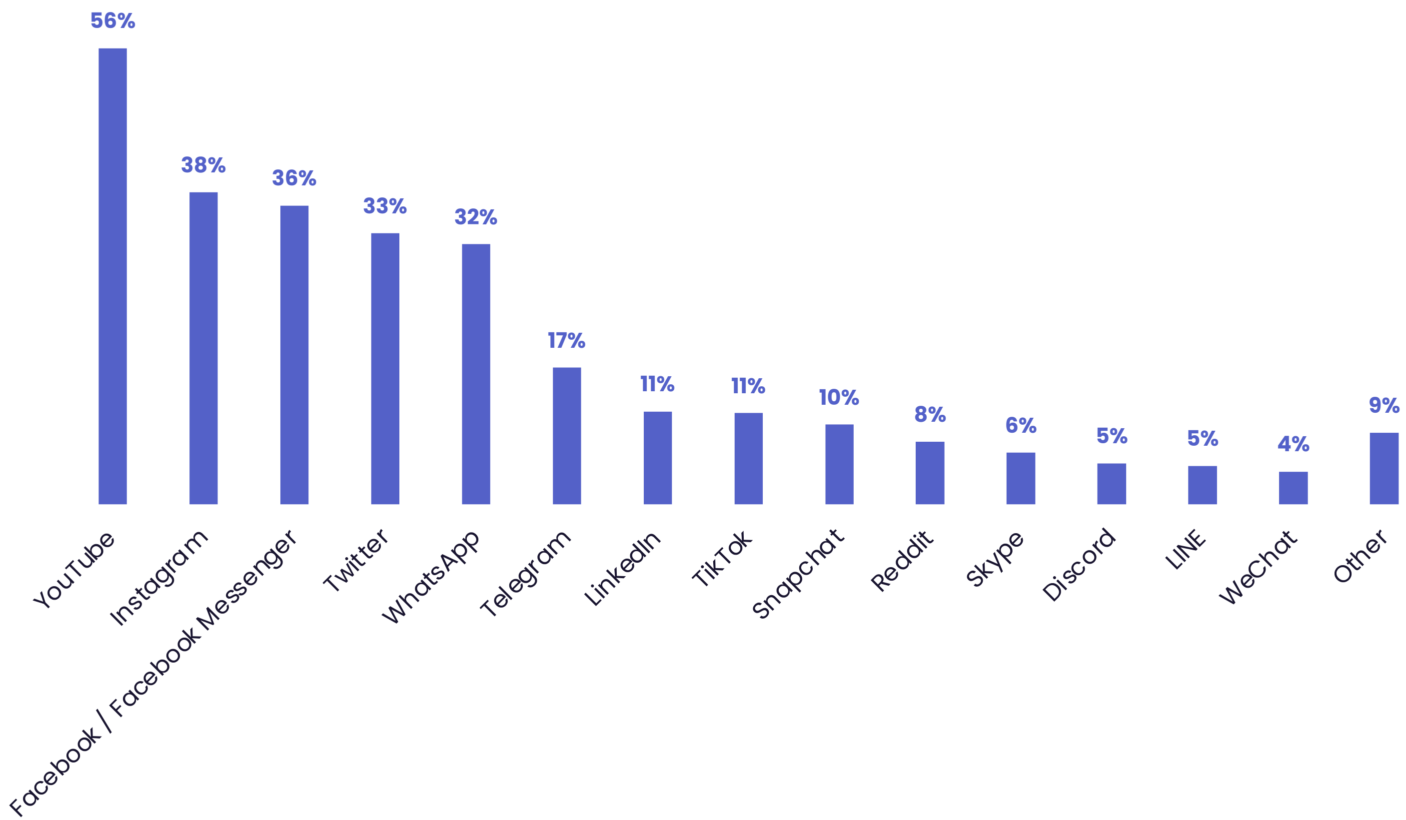
YouTube is now much more of a go-to media channel for this kind of breaking news and is clearly front-of-mind for consumers.

Age is highly impactful here: 60% of 16-24s say they are using Instagram to stay informed, vs 15% of 55-64s. YouTube (71%) is over twice as popular among 16-24s as 55-64s (33%).

Facebook is one of the services with the most consistent figures across age groups (36% among 16-24s and 28% among 55-64s).

Social media platforms used

% outside China who use the following platforms to keep up with the conflict



Source: Research on the Ukrainian conflict **Base:** 19,022 internet users aged 16-64 in 20 markets

YouTube and Twitter seeing increased visits

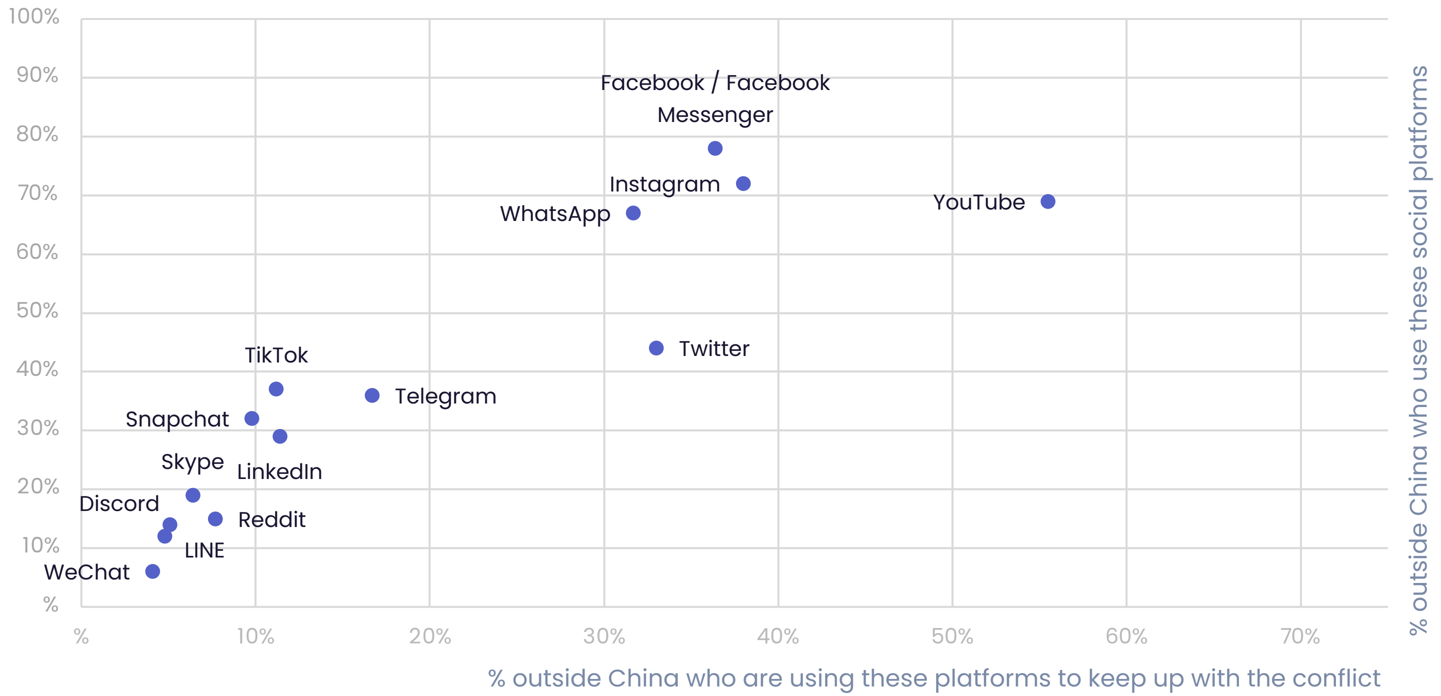
We can use our recontact methodology to plot social platforms being used more against their “baseline” usage from our Core research (excluding China), to best see which have become more relevant during the crisis (those on the right-hand side of this chart).

Twitter is a popular source of breaking news, while YouTube demonstrates how important video is in following the conflict.

Even as content from the frontline is seeing the conflict being dubbed “the first TikTok war” in some quarters, it’s not experiencing increased usage.

Separate research we conducted in February 2022 can shed some light here. Only 32% of TikTok users across 8 countries said they enjoyed “informative” content on the platform, placing it low among its peers. It’s more likely its users log on for a break from the conflict, not to consume information about it.

Platforms used to keep up with conflict vs. baseline usage

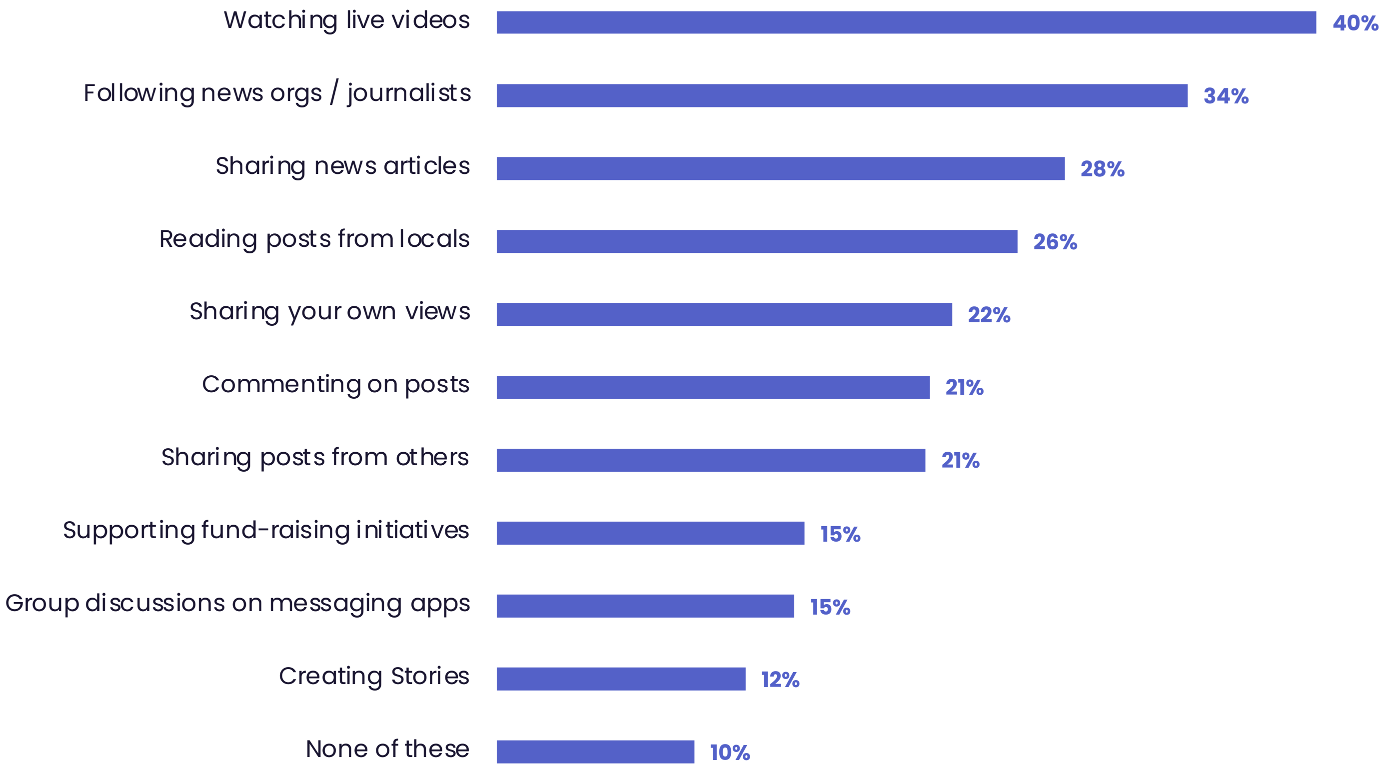


Source: Research on the Ukrainian conflict | GWI Core Q4 2021 **Base:** 19,022 internet users aged 16-64 in 20 markets

Video is central to how consumers follow events

Usage types on social media

% who have been using social/messaging/video platforms to keep up with the conflict in the following ways



Video is the central media type in following the conflict. As YouTube is seeing increased usage and not Instagram or TikTok, it suggests that it's more long-form content that's particularly important for consumer engagement.

Watching videos and following news orgs/journalists are the most popular behaviors across all age groups, though younger consumers are much more likely to post their own views.

We also asked consumers which of these behaviors they were doing more of, and roughly all of them were in line with their pre-conflict benchmarks. If video is important to how consumers are following the crisis, it's because it was a pre-existing habit.

Source: Research on the Ukrainian conflict **Base:** 20,428 internet users aged 16-64 in 21 markets

Want to know more?

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