

THE WORLD'S RESPONSE TO THE WAR IN UKRAINE

A 28-country Global Advisor survey

January 2023

For more information: www.ipsos.com/en/war-in-ukraine-january-2023

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GAME CHANGERS



SUMMARY OF FINDINGS

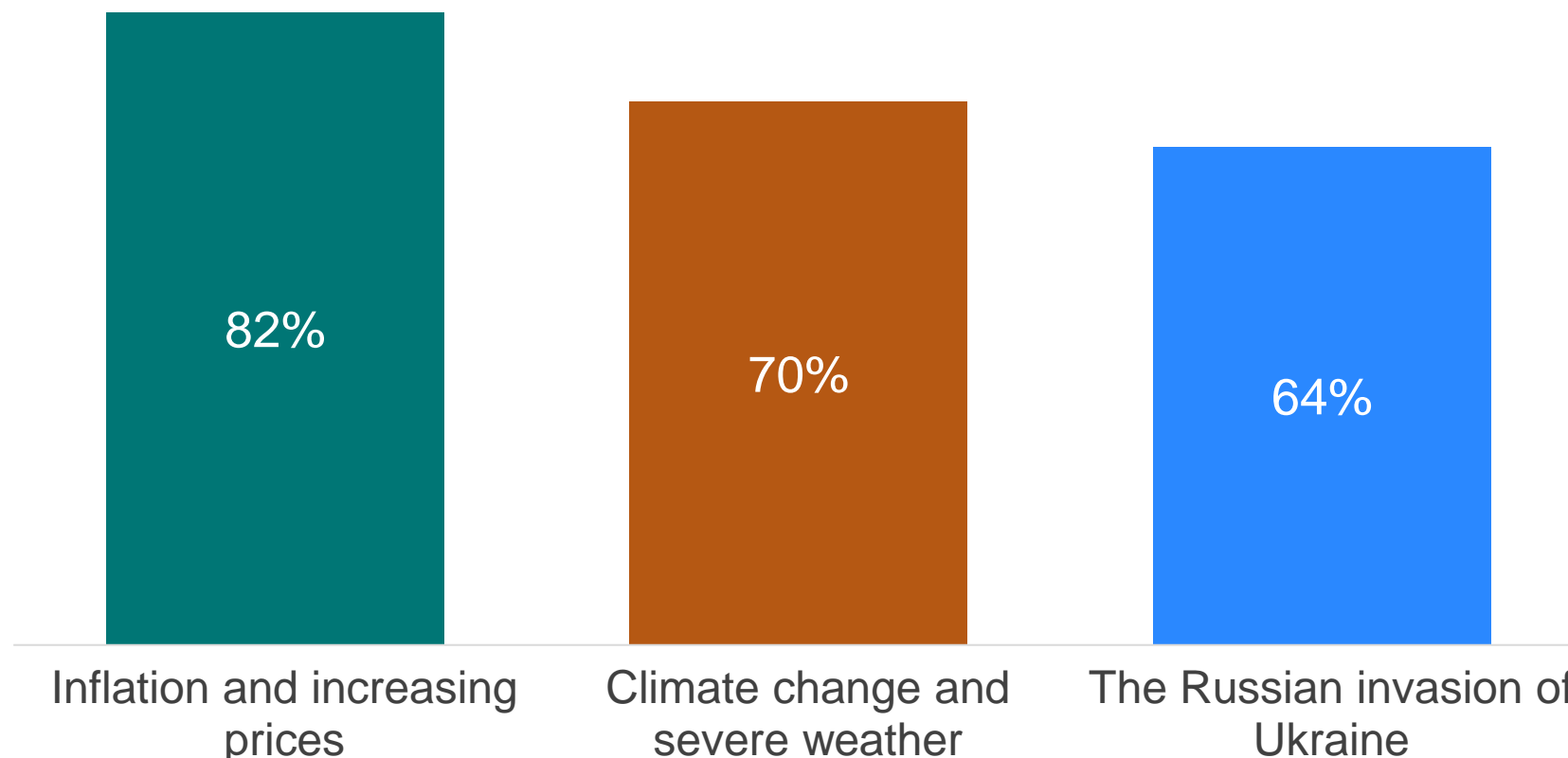
	Average	Change since Mar-Apr 2022	USA	Change since Mar-Apr 2022
All 28 countries				
Follow news about the Russian invasion of Ukraine closely	64%	-2	60%	-5
Agree their country should avoid getting involved militarily in the conflict	71%	-1	68%	+3
Agree Russia must be excluded from major international sports competitions	66%		73%	
Agree their country should take in Ukrainian refugees	66%	-7	66%	-6
Favor applying the most stringent economic sanctions against Russia	45%	-4	60%	-2
All 13 western countries				
Agree restrictions on Russian oil and gas imports are important to maintain, even if we must limit heating this winter	67%		64%	
Favor continuing to support Ukraine until all Russian forces have withdrawn from territory claimed by Ukraine	57%		57%	
Favor providing weapons and/or air-defense systems to the Ukrainian military	48%	0	54%	-5

ATTENTION PAID TO THE INVASION OF UKRAINE GLOBALLY

Q. How closely, if at all, have you been following stories about the Russian invasion of Ukraine?

% Following it very or somewhat closely
28-Country Average

- On average across 28 countries, 64% of the public surveyed follows the Russian invasion of Ukraine closely
- Only 18 points lower than inflation – the world's #1 concern – and 6 points lower than climate change and severe weather



Base: 19,003 online adults under the age of 75 across 28 countries
The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

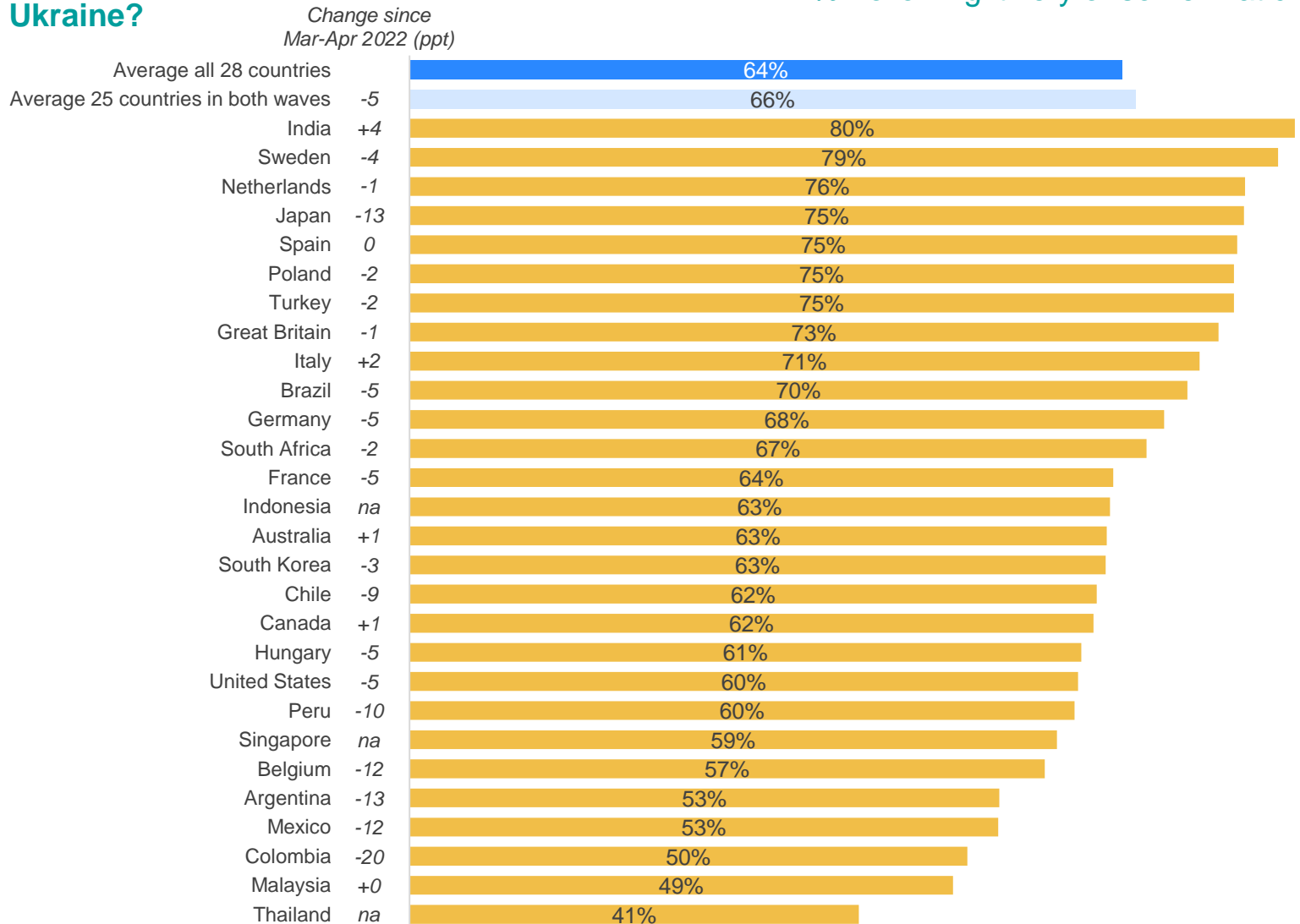
The samples in Brazil, Chile, Colombia, India, Indonesia, Malaysia, Mexico, Peru, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population.

ATTENTION PAID TO THE INVASION OF UKRAINE BY COUNTRY

Q. How closely, if at all, have you been following stories about the Russian invasion of Ukraine?

% Following it very or somewhat closely

- Attention paid to the Russian invasion of Ukraine is highest in India and Japan, as well as Sweden, the Netherlands, Poland, and Spain
- It is lowest in Thailand and Malaysia
- On average across all 25 countries already surveyed in late March-early April, it has dropped by 5 percentage points



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OPINIONS ON THE WAR IN UKRAINE: GLOBAL PICTURE

Q. To what extent do you agree or disagree with the following statements:

- On average globally, large majorities agree their country must support sovereign countries when attacked (70%), agree Russia must remain excluded from major international sports competition (66%), and disagree the problems of Ukraine are none of their country's business (58%)
- While somewhat softer than nine months ago, large majorities still agree that their country should take in Ukrainian refugees (66%) and that doing nothing in Ukraine will encourage Russia to take further military action elsewhere (63%)
- On average across all 28 countries surveyed, 53% agree that paying more for fuel and gas because of sanctions against Russia is worthwhile and, across the 13 countries that apply restrictions on Russian oil and gas imports, 67% agree they are important to maintain even if their citizens must reduce heating this winter
- However, 71% say their country should avoid getting involved militarily and 64% say it cannot afford financial support to Ukraine

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[My country] should avoid getting involved militarily in this conflict

[My country] must support sovereign countries when they are attacked by other countries

* Restrictions on Russian oil and gas imports are important to maintain, even if it means we must limit our heating this winter...

[My country] should take in Ukrainian refugees from the current conflict

Russia must continue to be excluded from major international sports competitions

Given the current economic crisis, [my country] cannot afford to lend financial support to Ukraine

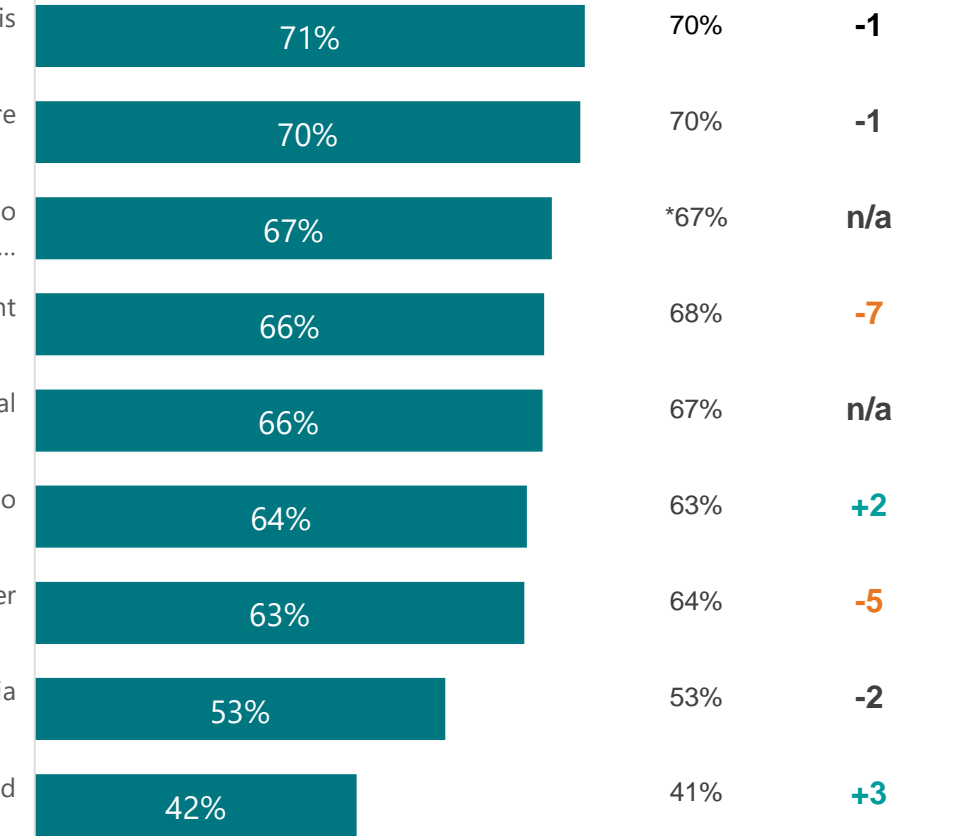
Doing nothing in Ukraine will encourage Russia to take further military action elsewhere in Europe and Asia

Paying more for fuel and gas because of sanctions against Russia is worthwhile to defend another sovereign country

The problems of Ukraine are none of our business, and we should not interfere

% Agree
28-Country Average

Average 25 countries in both waves
Change since Mar-Apr 2022 (pct points)



* Statement asked only in the 9 European Unions countries surveyed, Australia, Canada, Great Britain, and the United States

COUNTRIES WITH STRONGEST OPINIONS ON THE WAR IN UKRAINE

Q. To what extent do you agree or disagree with the following statements:

% agree

28-Country Average

Highest in:

Lowest in:

USA:

[My country] should avoid getting involved militarily in this conflict

71%

Hungary (85%),
Malaysia (85%)

Canada (56%),
Sweden (57%)

68%

[My country] must support sovereign countries when they are attacked by other countries

70%

Indonesia (84%),
India (81%), Great
Britain (81%)

Brazil (56%),
Hungary (59%),
Chile (59%)

69%

* Restrictions on Russian oil and gas imports are important to maintain, even if it means we must limit our heating this winter...

67%

Great Britain (78%),
Netherlands (76%)

Hungary (37%),
Germany (60%)

64%

[My country] should take in Ukrainian refugees from the current conflict

66%

Great Britain (81%),
Netherlands (80%)

Indonesia (44%),
Singapore (47%)

66%

Russia must continue to be excluded from major international sports competitions

66%

Great Britain (85%),
Poland (85%)

Indonesia (39%),
Mexico (44%)

73%

Given the current economic crisis, [my country] cannot afford to lend financial support to Ukraine

64%

Malaysia (81%),
South Africa (79%)

Netherlands (41%),
Sweden (43%)

59%

Doing nothing in Ukraine will encourage Russia to take further military action elsewhere in Europe and Asia

63%

Great Britain (79%),
Australia (76%)

Hungary (43%),
Argentina (49%)

68%

Paying more for fuel and gas because of sanctions against Russia is worthwhile to defend another sovereign country

53%

South Korea (72%),
India (71%)

Chile (34%),
Colombia (35%)

54%

The problems of Ukraine are none of our business, and we should not interfere

42%

India (62%),
Hungary (60%),
Thailand (60%)

Netherlands (25%),
Sweden (25%)

40%

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OPINIONS ON THE WAR IN UKRAINE BY COUNTRY

Q. To what extent do you agree or disagree with the following statements:

% agree

	28-Country Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	Colombia	France	Germany	Great Britain	Hungary	India	Indonesia	Italy	Japan	Malaysia	Mexico	Netherlands	Peru	Poland	Singapore	South Africa	South Korea	Spain	Sweden	Thailand	Turkey	United States
... should avoid getting involved militarily in this conflict	71%	73%	67%	71%	75%	56%	75%	71%	58%	75%	64%	85%	78%	72%	73%	70%	85%	75%	65%	71%	61%	78%	77%	73%	59%	57%	81%	81%	68%
... must support sovereign countries when they are attacked by other countries	70%	65%	79%	72%	56%	78%	59%	61%	72%	66%	81%	59%	81%	84%	65%	72%	78%	61%	77%	63%	78%	73%	60%	73%	75%	76%	73%	70%	69%
* Restrictions on Russian oil and gas imports are important to maintain, even if it means we must limit our heating this winter in ...	67%	n/a	74%	62%	n/a	68%	n/a	n/a	69%	60%	78%	37%	n/a	n/a	62%	n/a	n/a	n/a	76%	n/a	75%	n/a	n/a	n/a	72%	72%	n/a	n/a	64%
... should take in Ukrainian refugees from the current conflict	66%	70%	75%	64%	79%	77%	60%	59%	69%	68%	81%	66%	70%	44%	75%	71%	49%	72%	80%	67%	73%	47%	51%	55%	78%	79%	51%	50%	66%
Russia must continue to be excluded from major international sports competitions	66%	55%	79%	69%	70%	77%	59%	53%	73%	70%	85%	48%	66%	39%	66%	67%	56%	44%	78%	55%	85%	70%	57%	69%	74%	82%	63%	57%	73%
Given the current economic crisis, ... cannot afford to lend financial support to Ukraine	64%	78%	52%	65%	61%	50%	70%	68%	53%	56%	52%	67%	73%	66%	63%	58%	81%	72%	41%	73%	70%	62%	79%	60%	57%	43%	76%	76%	59%
Doing nothing in Ukraine will encourage Russia to take further military action elsewhere in Europe and Asia	63%	49%	76%	65%	62%	73%	62%	55%	68%	63%	79%	43%	74%	51%	59%	69%	59%	51%	62%	55%	70%	66%	60%	63%	69%	75%	62%	64%	68%
Paying more for fuel and gas because of sanctions against Russia is worthwhile to defend another sovereign country	53%	38%	63%	40%	41%	60%	34%	35%	50%	54%	67%	38%	71%	62%	44%	61%	66%	36%	63%	37%	65%	56%	45%	72%	51%	69%	54%	60%	54%
The problems of Ukraine are none of our business, and we should not interfere	42%	51%	35%	36%	38%	30%	50%	40%	34%	43%	27%	60%	62%	48%	36%	32%	54%	57%	25%	51%	28%	44%	41%	37%	32%	25%	60%	51%	40%

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CHANGE IN OPINIONS ON THE WAR IN UKRAINE BY COUNTRY

Q. To what extent do you agree or disagree with the following statements:

Change in % agree between Mar-Apr 2022 and Nov-Dec 2022 (in percentage points)

	Average 25 countries in both waves	Argentina	Australia	Belgium	Brazil	Canada	Chile	Colombia	France	Germany	Great Britain	Hungary	India	Italy	Japan	Malaysia	Mexico	Netherlands	Peru	Poland	South Africa	South Korea	Spain	Sweden	Turkey	United States
[My country] should avoid getting involved militarily in this conflict	-1	-3	+4	0	+2	0	+6	-7	-7	-2	-1	-5	0	-4	-3	+4	-3	-4	0	0	-1	0	-1	-1	-5	+3
[My country] must support sovereign countries when they are attacked by other countries	-1	-1	+1	+3	+3	-1	-9	+2	-4	-6	0	+6	0	-3	-4	+2	+9	-3	+1	-5	-2	0	-1	-7	+2	-4
[My country] should take in Ukrainian refugees from the current conflict	-7	-8	-5	-14	-6	-3	-11	-3	-10	-14	-3	-10	-2	-7	-9	-10	-6	-6	-6	-11	-6	0	-7	-9	-3	-6
Given the current economic crisis, [my country] cannot afford to lend financial support to Ukraine	+2	+3	+2	+7	-3	+2	+3	-2	+8	+9	+3	-1	-1	+4	+10	0	0	+5	-5	+7	-2	0	+1	+11	-2	+4
Doing nothing in Ukraine will encourage Russia to take further military action elsewhere in Europe and Asia	-5	-12	0	-1	-3	-1	-5	-12	-1	-11	+1	-4	+3	-3	-9	-3	-8	-7	-7	-6	-9	0	-4	+1	+1	-9
Paying more for fuel and gas because of sanctions against Russia is worthwhile to defend another sovereign country	-2	-1	-1	-1	+1	+7	-9	-9	-2	-2	0	0	-2	-1	-9	-5	+1	-4	-1	-11	-3	0	+4	+4	+4	-1
The problems of Ukraine are none of our business, and we should not interfere	+3	+1	+4	+4	+3	+6	+7	-5	+4	+11	+1	-6	+5	+1	+7	-5	+5	+5	+6	+1	-3	0	+6	+5	+13	+6

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OPINIONS ON OWN COUNTRY'S RESPONSE: GLOBAL PICTURE

Q. Would you support or oppose [your country] doing the following in response to the current situation in Ukraine?

- On average across all 28 countries surveyed, there is more support than opposition to stringent sanctions against Russia and restricting oil and gas imports from Russia despite the risk of price increases, but also to keeping diplomatic ties with Russia
- Also, on average globally, there is majority opposition to one's own country sending troops to Ukraine while opinions are mixed about sending troops to NATO countries neighboring Ukraine and providing weapons and/or air defense systems to the Ukrainian military
- However, across the US, Canada, Britain, Australia and the nine EU countries surveyed, proponents of continued support to Ukraine until all Russian forces have left its territory outnumber opponents by an average ratio of 3 to 1

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* Continuing to support Ukraine until all Russian forces have withdrawn from territory claimed by Ukraine

Applying the most stringent economic sanctions against Russia

Maintaining diplomatic ties with Russia

Limiting or restricting imports of oil and gas from Russia even if this leads to steep increases in energy and food prices

Providing weapons and/or air-defense systems to the Ukrainian military

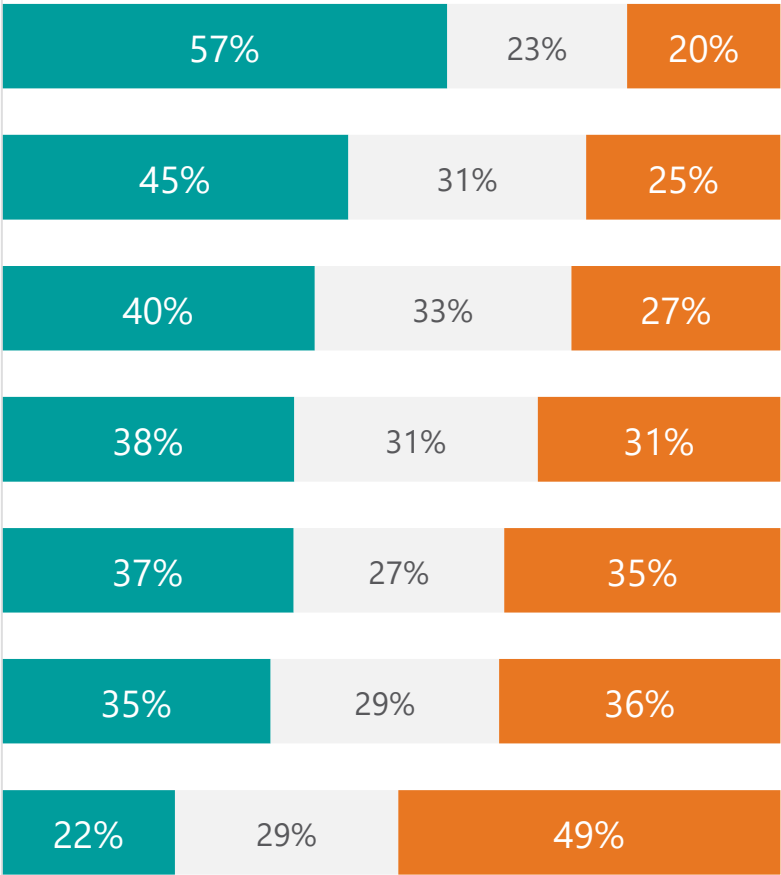
Sending troops to NATO countries neighboring Ukraine

Sending troops to Ukraine

28-Country Average

■ Support ■ Not sure ■ Oppose

Net score



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CHANGE IN OPINIONS ON OWN COUNTRY'S RESPONSE – GLOBALLY

Q. Would you support or oppose [your country] doing the following in response to the current situation in Ukraine?

- On average, across the 25 already countries surveyed back in March-April 2022, views about how one's country should respond to the situation in Ukraine have not changed much.
- Support for applying tough sanctions against Russia and restricting imports of fuel from Russia are softened only very slightly.
- On the other hand, support for various forms of military action have also firmed up slightly.

* Continuing to support Ukraine until all Russian forces have withdrawn from territory claimed by Ukraine

Applying the most stringent economic sanctions against Russia

Providing weapons and/or air-defense systems to the Ukrainian military

Maintaining diplomatic ties with Russia

Limiting or restricting imports of oil and gas from Russia even if this leads to steep increases in energy and food prices

Sending troops to NATO countries neighboring Ukraine

Sending troops to Ukraine

% Support
28-Country Average

Average 25
countries in
both waves

Change since
Mar-Apr 2022
(pct points)

57%

n/a

n/a

45%

46%

-4

37%

39%

+2

40%

39%

+2

38%

38%

-3

35%

35%

+2

22%

22%

+4

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COUNTRIES WITH STRONGEST OPINIONS ON THEIR OWN RESPONSE

Q. Would you support or oppose [your country] doing the following in response to the current situation in Ukraine?

% Support

* Continuing to support Ukraine until all Russian forces have withdrawn from territory claimed by Ukraine

28-Country Average

57%

Highest in:

Sweden (69%),
Great Britain (68%)

Lowest in:

Hungary (37%),
Italy (42%)

USA:

57%

Applying the most stringent economic sanctions against Russia

45%

Great Britain (70%),
Sweden (65%)

Turkey (22%),
Malaysia (25%),

60%

Providing weapons and/or air-defense systems to the Ukrainian military

37%

Great Britain (63%),
Canada (60%),
Sweden (60%)

Indonesia (16%),
Malaysia (17%),
Colombia (17%)

54%

Maintaining diplomatic ties with Russia

40%

Indonesia (73%),
India (66%)

Poland (21%),
Canada (26%),
Spain (26%)

33%

Limiting or restricting imports of oil and gas from Russia even if this leads to steep increases in energy and food prices

38%

Great Britain (55%),
Poland (54%)

Peru (19%),
Argentina (19%)

45%

Sending troops to NATO countries neighboring Ukraine

35%

Canada (59%),
Great Britain (57%)

Mexico (16%),
Colombia (17%)

48%

Sending troops to Ukraine

22%

India (43%),
Canada (36%),
Australia (36%)

Hungary (9%),
Mexico (11%)

27%

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OPINIONS ON OWN COUNTRY'S RESPONSE BY COUNTRY

Q. Would you support or oppose [your country] doing the following in response to the current situation in Ukraine?

% support

	28-Country Average	Argentina	Australia	Belgium	Brazil	Canada	Chile	Colombia	France	Germany	Great Britain	Hungary	India	Indonesia	Italy	Japan	Malaysia	Mexico	Netherlands	Peru	Poland	Singapore	South Africa	South Korea	Spain	Sweden	Thailand	Turkey	United States
* Continuing to support Ukraine until all Russian forces have withdrawn from territory claimed by Ukraine	57%	-	66%	47%	-	65%	-	-	56%	49%	68%	37%	-	-	42%	-	-	-	63%	-	65%	-	-	-	61%	69%	-	-	57%
Applying the most stringent economic sanctions against Russia	45%	34%	61%	52%	33%	61%	33%	33%	57%	50%	70%	30%	47%	29%	42%	52%	25%	31%	61%	32%	60%	45%	42%	30%	62%	65%	28%	22%	60%
Providing weapons and/or air-defense systems to the Ukrainian military	37%	20%	58%	43%	25%	60%	20%	17%	52%	48%	63%	21%	47%	16%	30%	30%	17%	18%	59%	23%	60%	34%	32%	38%	49%	60%	24%	35%	54%
Maintaining diplomatic ties with Russia	40%	33%	34%	38%	32%	26%	30%	37%	50%	45%	33%	37%	66%	73%	51%	30%	49%	48%	32%	41%	21%	39%	32%	48%	26%	31%	50%	62%	33%
Limiting or restricting imports of oil and gas from Russia even if this leads to steep increases in energy and food prices	38%	19%	53%	36%	23%	51%	21%	23%	45%	42%	55%	21%	47%	25%	43%	45%	29%	21%	53%	19%	54%	42%	31%	44%	45%	51%	34%	35%	45%
Sending troops to NATO countries neighboring Ukraine	35%	18%	49%	47%	22%	59%	18%	17%	45%	33%	57%	23%	46%	26%	29%	21%	26%	16%	54%	18%	53%	30%	28%	30%	47%	50%	30%	29%	48%
Sending troops to Ukraine	22%	12%	36%	23%	17%	36%	13%	14%	24%	19%	33%	9%	43%	22%	15%	14%	19%	11%	30%	12%	22%	25%	24%	22%	30%	32%	27%	15%	27%

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CHANGE IN OPINIONS ON OWN COUNTRY'S RESPONSE – BY COUNTRY

Q. Would you support or oppose [your country] doing the following in response to the current situation in Ukraine?

Change in % support between Mar-Apr 2022 and Nov-Dec 2022 (in percentage points)

	25 Repeat countries	Argentina	Australia	Belgium	Brazil	Canada	Chile	Colombia	France	Germany	Great Britain	Hungary	India	Italy	Japan	Malaysia	Mexico	Netherlands	Peru	Poland	South Africa	South Korea	Spain	Sweden	Turkey	United States
Applying the most stringent economic sanctions against Russia	-4	-2	-2	+1	-2	-6	-5	+5	-5	-12	-4	-3	+7	-8	-9	-4	-1	-11	-1	-10	+2	-32	+6	-4	-1	-2
Providing weapons and/or air-defense systems to the Ukrainian military	+2	+6	+8	-2	+1	+2	-1	+0	-1	-7	-0	+6	+9	-2	+6	-1	+3	-6	+9	+2	+7	-2	+3	-1	+16	-4
Maintaining diplomatic ties with Russia	+2	+5	+6	+3	+5	+2	+3	-4	-8	-3	-1	+2	+4	+2	-1	+5	+7	+5	+6	+1	-4	+5	-1	-1	-1	+2
Limiting or restricting imports of oil and gas from Russia even if this leads to steep increases in energy and food prices	-3	-9	-4	+1	-4	-10	-8	-10	-8	-3	-11	+3	+8	+3	-4	+5	-8	+5	-8	-4	+2	-4	-1	-10	+20	-11
Sending troops to NATO countries neighboring Ukraine	+2	+2	+7	-4	+2	+1	-4	+3	-9	-9	-2	+7	+7	-3	+1	+9	+3	-8	+2	+13	+2	+2	-0	+17	+13	-1
Sending troops to Ukraine	+4	+4	+12	+3	+1	+7	-0	+2	+4	+2	+9	+5	+4	-2	+0	+4	+2	+10	+3	+8	+3	+3	+7	+10	+6	+4

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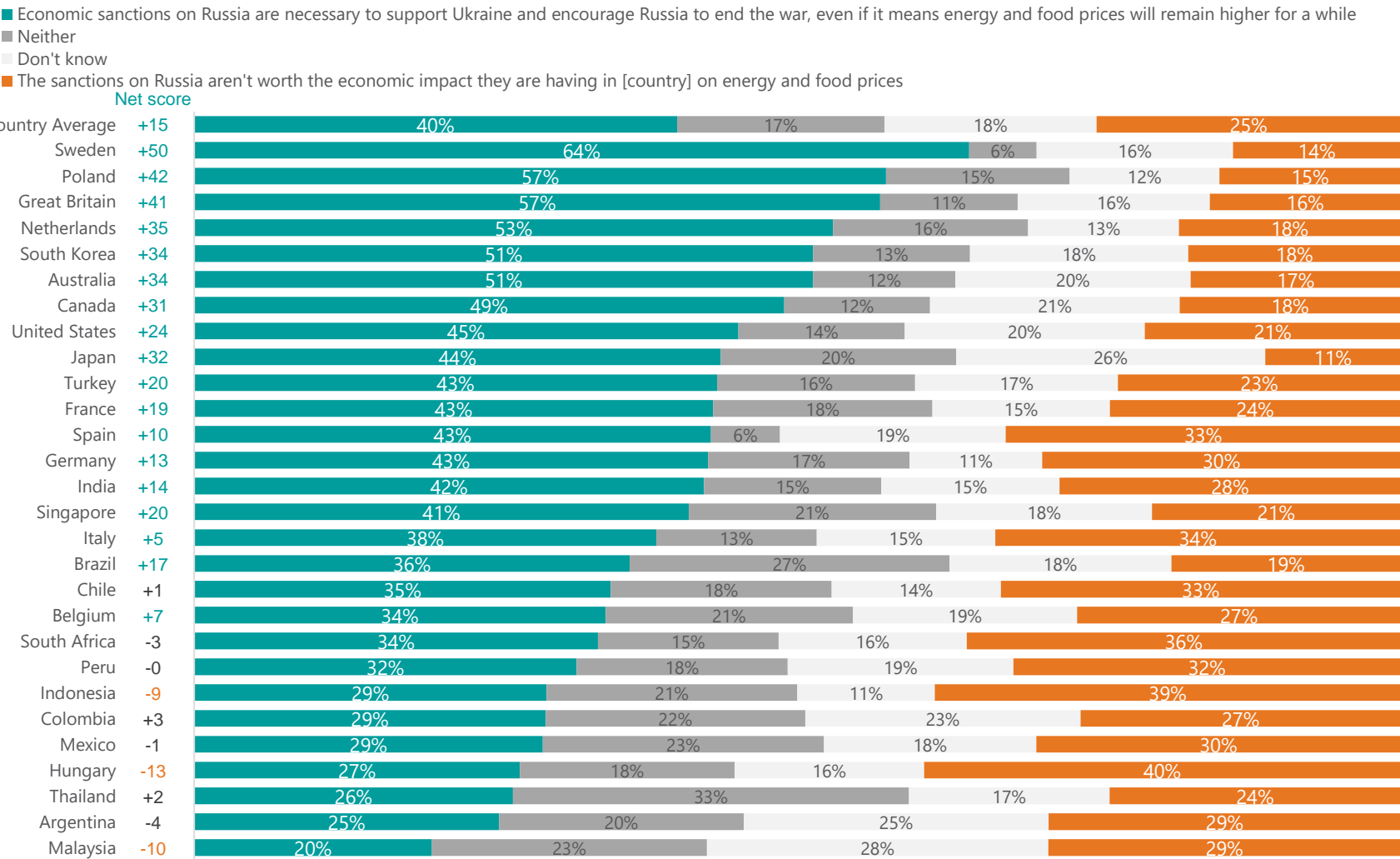
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OPINIONS ABOUT SANCTIONS ON RUSSIA RELATIVE TO INFLATION

Q. All in all, which of the following two opinions is closest to how you feel?

- More think that economic sanctions on Russia are necessary to support Ukraine and encourage Russia to end the war despite their impact on energy and food prices than feel the sanctions on Russia aren't worth the economic impact they are having in their country – by a difference of 15 percentage points on average across the 28 countries surveyed.
- Only three countries show significantly more saying sanctions are not worth the negative impact they have on their economy significantly than saying they are worth it: Hungary, Malaysia, and Indonesia.



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Methodology

These are the findings of a 28-country Ipsos survey conducted November 25 – December 9, 2022, among 19,003 adults aged 18-74 in the United States, Canada, Malaysia, South Africa, and Turkey, 20-74 in Thailand, 21-74 in Indonesia, and 16-74 in 20 other countries, via Ipsos's Global Advisor online survey platform.

Each country's sample consists of ca. 1,000 individuals in each of Australia, Brazil, Canada, France, Germany, Great Britain, Italy, Japan, Spain, and the United States and ca. 500 individuals in each of Argentina, Belgium, Chile, Colombia, Hungary, India, Indonesia, Malaysia, Mexico, the Netherlands, Peru, Poland, Singapore, South Africa, South Korea, Sweden, Thailand, and Turkey.

The samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden, and the United States can be taken as representative of these countries' general adult population under the age of 75.

The samples in Brazil, Chile, Colombia, India, Indonesia, Malaysia, Mexico, Peru, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these markets should be viewed as reflecting the views of the more "connected" segment of their population.

The data is weighted so that each market's sample composition best reflects the demographic profile of the adult population according to the most recent census data.

The Global average reflects the average result of all the countries and markets where the survey was conducted that year. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

Where results do not sum to 100 or the 'difference' appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses or the exclusion of don't knows or not stated responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 5.0 percentage points. For more information on Ipsos's use of credibility intervals, please visit the Ipsos website.

The publication of these findings abides by local rules and regulations.

ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder.
Ultimately, success comes down to a simple truth:
You act better when you are sure.