

# **UKRAINE**

## NATION BRANDING RESEARCH

09.06.17



# Research Approach

## Qualitative Sample:



- x6 consumer focus groups in London, Hamburg and Warsaw
- A mix of Male/ Female, and ages 30-60 years in each group



- 6 x 30-45 minute Teledepths with Opinion Formers



# CURRENT PERCEPTIONS OF UKRAINE

(i.e. the challenge)



Perhaps not surprisingly when people think of Ukraine (consumers or business) the same negative associations arise

**Revolution**

**Corruption**

**Russia / Crimea**

**A country still in the midst of uncertainty, unrest and even war**

And this is then reflected in how many think about the people of Ukraine and powers that be:

- Aggressive / unwelcoming
- Corrupt
- Potentially racist

Admittedly consumers concede that these views are sometimes stereotypes and prejudice, based purely from what they see and hear through the press

Obviously when you think of Ukraine you think of Russia and you think trouble and conflict (UK consumer)

# And for many this is all they have ever seen / known about Ukraine, it's hard for them to bring much else to mind

Among consumers there's little awareness of any positive features of Ukraine. In truth, they know very little about the country at all, at best they can recall:

- The name of a city or two
- The Black Sea coastline
- Oil and / or Natural as a resource – transit land
- Farming / agriculture

But they are unsure how far away it is (many assume 4-5hrs minimum , both in the UK and Germany); have little idea of size and population. And indeed there is a struggle to identify Ukraine as part of Europe, yes, people know it is 'in' Europe but it's not considered in same bracket as its western neighbours.

I think they have oil don't they? and they're good farmers (Poland consumer)

It is quite big, maybe similar to Italy, but not many people (German consumer)

# But it's a different story from those who have visited Ukraine for leisure or business, they are quick to dismiss negative sentiments

Having experienced the Ukraine many are keen to share their views and experiences to help change the perceptions expressed by the wider audiences

- They talk of kind and welcoming people
- Of beautiful landscapes, cities and beaches / coastlines
- Unique and interesting history, culture and architecture

And they explain that many Ukrainians, and particularly in the West are more progressive, want to be seen as more western (and not like Russia)

**BUT... they can't deny that it is a bit corrupt and there are aggressive people and dangerous places**

You'd be surprised, they are really welcoming and inquisitive, and want to see and hear more from western Europe (Opinion Former)

Listen, I like the Ukraine but it's still a bit dodgy, never mind breadbasket we call it the 'bribebasket' (Opinion Former)

We knew this would not be an easy task, and there may not be many quick wins. The challenge is to find fertile territory to capture attention, and educate people on what the Ukraine is, what it stands for, and most importantly **what it has to offer**



# RESPONSE TO FACTS ABOUT UKRAINE



Presented with an array of facts and information consumers and business, responded typically in 3 ways...

1.

**Antagonised**



Some information just didn't feel believable, or was too contradictory to what they know / believe they know – sometimes a little brash and overconfident

2.

**Surprised**



Some points were surprising and challenged what they understood about Ukraine with new believable information, but not always particularly interesting

3.

**Intrigued**



Offers something new and interesting (and they want to know more about it), it's relevant to their needs – can lead to excitement

# 1. Antagonised by claims

While it's okay to be proud of development and it's necessary to communicate progress it's important to come across as humble. And even when presented with 'facts' shared about the Ukraine there was some resistance

- **'Booming' tourist destination for young people** →
- **A young, technocrat, pro-business government** →

Even presented as 'facts' they were questionable, but transitioned into a promotional context they became 'brags' and 'boasts' which felt ingenuine

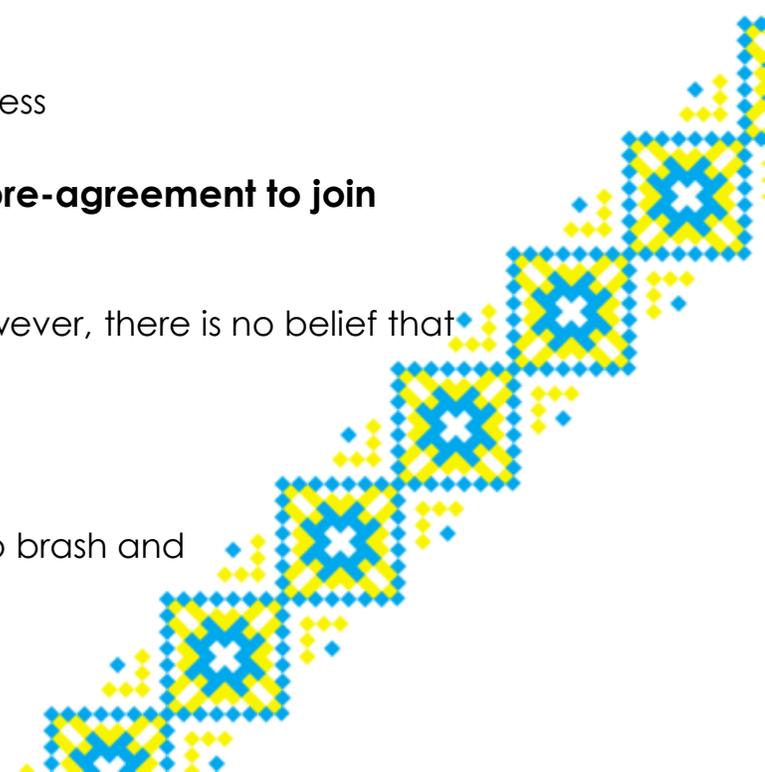
It's a bit early to say that. I imagine they get a few stag do's  
(UK consumer)

Really? Are they young? and I'll be damned if it's not still a bit corrupt  
(Poland consumer)



# 1. Antagonised by claims (within propositions)

- **Our politicians are young, our society open and pro-business**
  - This is seen as incorrect (especially for Opinion Formers) for the following reasons:
    - The government is seen as in the hands of the old guard and not enough young politicians are coming through
    - The society is trying to be open but not there yet
    - It is very hard to do business in Ukraine and for some there is no desire to be pro-business
- Today we enjoy a free trade agreement and visa-free travel arrangements **as well as a pre-agreement to join NATO**
  - All felt the end statement in this fact is misleading. Yes there is an agreement in place, however, there is no belief that an agreement will actually be made
- **We are the fourth most educated in the world...**
  - This is not a motive to visit Ukraine for either consumers or potential investors – and feels too brash and questionable



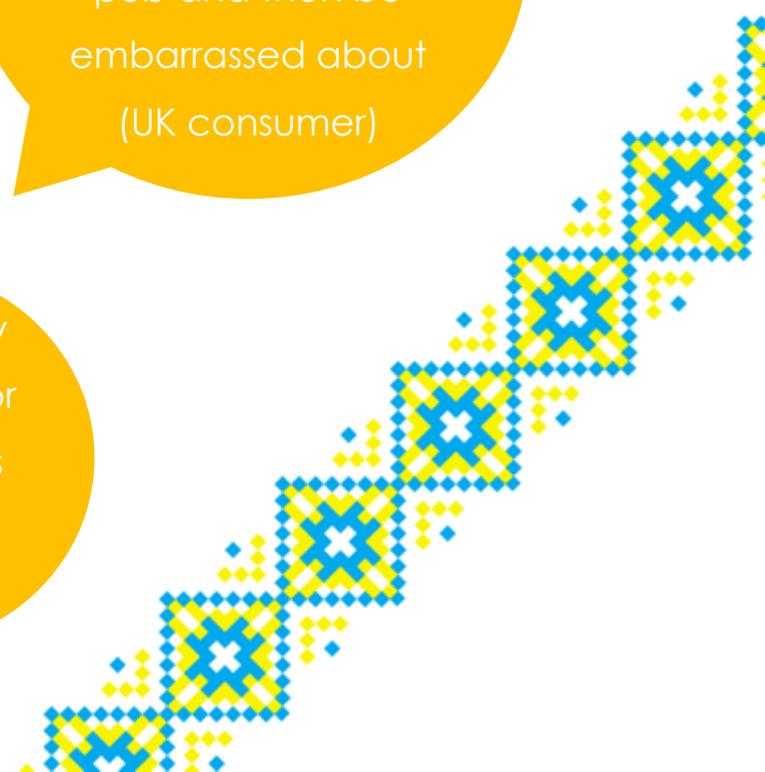
## 2. Surprised by claims

The lack of knowledge about Ukraine meant that basic facts about the country's size and infrastructure came as a shock, greeted with a sense 'well I didn't know that', but also a hint of 'so what'

- **Ukraine is largest country in Europe**
- **99.4% Literacy rate & 70% secondary or higher education**
- **33% of the world's black soil is located in Ukraine (the most fertile type of soil)**

It's relatively interesting, something you might relay in the pub and then be embarrassed about  
(UK consumer)

I didn't know that, good for them I guess  
(German consumer)



## 2. Surprised by claims (within propositions)

- **Ukraine contains one third of the world's richest, most fertile black soil and is the number one global exporter of sunflower oil and the 3<sup>rd</sup> largest grain exporter in the world**
  - Although not felt to talk directly to consumers, these facts were found interesting and helped support a more positive view of the country
- **You can enjoy the wonders of Ukraine from anywhere in Europe in under three and a half hours**
  - Our audience all assumed that the journey time was a lot longer and not a destination you could visit just for a short break - there was genuine surprise across both markets – but that's not enough to get the to go
- **We turn out more engineering and IT graduates per year than any other country in Europe**
  - Certainly not something many people knew, though rationally it made sense to them and is often connected to their history as a cold state



### 3. Intrigued by claims

There's plenty that Ukraine has to offer in terms of culture (old and new), and natural beauty which captures the imagination of consumers and business alike. Indeed it's these factors which really tell us what a country is about, and are the reasons we want to visit them and see it for ourselves

- **Ukraine has 7 UNESCO heritage sites**
- **Black sea has many beautiful beaches and there is a café culture in major cities**
- **Medieval history – Lviv founded in the middle ages, a poetic city steeped in legends**  
(Lviv – known as Lemburg in Germany)



I didn't know that it had such rich history, I really didn't (German consumer)

### 3. Intrigued by claims (within propositions)

- **Our designers are turning the fashion world on its head, with the likes of Vogue looking to Ukraine as a centre for fresh looks and ideas**
  - This did antagonise our audience with the language used, however the message behind it was one that did surprise
- **Discover Kyiv: the cutting-edge of fashion, music and nightlife**
  - This encourages consumers to investigate more; for opinion formers, they agree there is a rich cultural scene in Kyiv which should be talked about
- **Our unspoilt forested mountains, fantastic summer beaches, popular attractions and exciting cities are just waiting to be discovered**
  - They want to hear this - give them a reason to investigate the possibility of visiting Ukraine more



### 3. Intrigued by claims (within propositions)

- **We're a country that shares modern Europe's values and aspirations**
  - This makes consumers want to know more... the current perception of Ukraine is not particularly 'European' so this statement does intrigue and they want to know more – can it be justified though
  - However, Opinion Formers felt this is not necessarily true right now, but there is a desire from Ukraine to achieve this

Consumers picked up that not enough was made of the wider and ancient culture of the country, they were hoping wanted to hear more about what there was to see and learn, but it never really arose within any proposition explored in research





# EXPLORING RESPONSE TO PROPOSITIONS



We tested three propositions, and although response was relatively muted for all, one stands out as having potential

### **Our People Are Our Power**



In truth some people felt a little sceptical, for others it lacked humility. Too easily it brings to mind images trouble and conflict

### **Ukraine: Energising Europe**



Begins to educate and surprise, but there's a sense that you're trying to be something your not. Don't be ashamed of your unique strengths

### **Opportunity Ukraine**



Still contains some irrelevant / boring information but has the potential to drive interest and generate more questions

# Our People Are Our Power

There are a number of fundamental issues with this proposition:

1.

Having great people is not something you can own. It's a positive, it tackles a negative perception but it's not a reason to engage

Oh god that's embarrassing, so what if they work hard. Don't they think we do (Poland consumer)

2.

Talking about 'people' and 'power' quickly brings to mind many negative connotations about recent issues

It sounds a bit aggressive, you just think of the revolution which isn't great – it was a bloody one (Opinion Former)

# But that doesn't mean we can't take elements from this proposition to highlight the local culture of the people

- The Opinion Formers and the consumers (who had holidayed there) all agreed that part of the Ukraine charm is the people and their culture
- The community spirit is evident, in both the cities and the countryside, with locals willing to help and make each visitor's experience the best they can by welcoming and embracing the different cultures that visit their country

**This shouldn't be ignored as local communities and cultures are both felt to be positive reasons to visit a country, whether on holiday or on a business level**

The people were a surprise to me, so welcoming to everyone, they want to get to know different people from different cultures  
(Opinion Former)

# Ukraine: Energising Europe

This proposition created polarised responses from both consumers and opinion formers, undoubtedly there are benefits in bringing Ukraine closer to Europe, but in doing so we lose a lot of what is unique and appealing about the Ukraine



- Appears more new and modern
- Become more accessible
- Feels more familiar
- Becomes further from Russia
- Comparable to European destinations



- A little aggressive and overbearing
- Not always believable lacked integrity
- Lacked focus on consumers
- Shied away from cultural history

# If focussed on being more like Europe there are core benefits to consumers for tourism

Many were surprised to hear how accessible Ukraine was, both logistically and culturally. For some this proposition created a feeling that Ukraine was not so different after all, and there were specific messages and tonality which help convey this:

- Visa-free travel arrangements
- Within three and half hours from anywhere in Europe
- Golden beaches which are the Med
- Fashion, music and nightlife

I didn't know it was visa-free, that's good to know. But something I'd look at later

It's not even that relevant to me but I like to hear about music and nightliffe

**But these were too often very rational, practical reasons – not something which would get you there, more something to consider once people are already bought in (emotionally)**

# But the tone of the proposition overall often did not land particularly well – seen as brash and sometimes misleading

- Some statements are so bold they become unbelievable, and the overarching title 'energising Europe' felt a little uncomfortable, somewhat brash, a little aggressive and lacking in humility
- For consumers, there was not much in this message that made them want to learn more, with only a brief mention of the things they want to hear about such as beaches, mountains, cities etc.
  - Not enough about the history and culture and uniqueness of Ukraine
  - They want the reassurance of European values, but the discovery of new landscapes and culture – something to capture them emotional

It's a little bit, look at us and everything we can do, that's not a great quality

Nothing really hits me in the gut. When I go somewhere new its because I'm enticed in often by something pretty

# Opportunity Ukraine

- This is the strongest message, working for both consumers and business. The fact that this is a broad, almost cover all phase certainly helps – it allows you to let it mean what you want it to mean
- For potential investors, not only is the economy growing, the IT and engineering sectors are known to be strong creating more opportunities on a business level. It is a growing market so ‘opportunity’ feels an appropriate and true
- For the consumer, having begun to learn there are many different places to discover, ranging from cities to beaches to mountains – an opportunity for everyone

If you know the Ukraine for business you know there's opportunity so yes this is good

From what we've heard today I can relate to this, more so than an hour ago

# However, there were some issues with the tonality, for some it felt more like a plea than an offer

The phrasing throughout the proposition, and to an extent simply in the phrase 'opportunity Ukraine' can sometime feel a desperate – almost as if Ukraine is asking for help, pleading for people to pay them attention (look at me)

- 'We're home to a billion new ideas, and infinite possibilities'

And this may be the desire but appearance needs to be more prophetic, we need to create an image of a country brimming with chance, whilst open and accessible

To do this sharing more about the country's wealth of culture and beauty creates a better balance

It's not exactly subtle is it. We've got this and we've go that, blah blah blah

It's almost like they're throwing too much in there. I'm getting lost. What's the focus?

For consumers especially there's real opportunity within this proposition to focus on the information which intrigues and excites

People need a **strong reason** to visit and explore a new country, especially when it lacks a strong identity, and people know and understand little about them

- From those who'd experienced Ukraine we repeatedly heard about the 'charm' of Ukraine; the un-spoilt landscape, the community feel, the traditions, the culture and the beauty
- It's a country which is progressive and accessible, but has not yet been overly modernised and spoilt through business and tourism – and that is a real opportunity (get in before it's too late)

This is the real opportunity for many to discover what Ukraine is really all about – also worth noting, once people actually start visiting the scary perceptions will soon start going away



# RESPONSE TO IMAGES



# Images can help support the message, but it is crucial to get them right

From the images shown it is evident what works when trying to promote Ukraine...

## What works

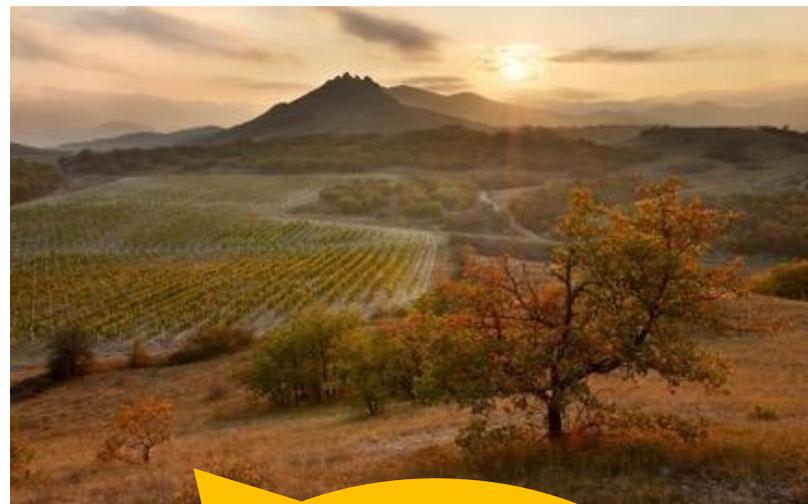
- Ukraine has a great colour palette and flag
- The landscape/ beaches/ mountains are beautiful and unexpected (intriguing)
- For people - it's friendly individuals
- Showing the '**real Ukraine**' is key

## What doesn't

- Pure industrial images – this alienates consumers, and it's not appealing to business either
- Crowds, and too many flags, can communicate revolution / protest

# The ones that work....

"Is this really Ukraine?  
It looks like  
somewhere I have  
been before. Looks  
amazing" (UK  
consumer)



"This looks like  
Tuscany to me.  
Really beautiful. I  
never knew Ukraine  
was like this"  
(Germany  
consumer)

"The city by night  
looks great... I could  
see myself going  
there for a long  
weekend" (Poland  
consumer)



## The ones that work....



"This has real strength... the floral headdress, the flag, it really says Ukraine"  
(Opinion Former)

"I like the young and the old here, showing different generations wearing traditional outfits. It is charming" (UK consumer)



## The ones that work....

"This image makes me feel relaxed just by looking at it! That is all I want from a holiday" (Poland consumer)



"This really works with the flag colours, very clever. It also works for business and consumers" (Opinion Former)

# And those that didn't...

"I don't think this is giving the right message out. It is a good photo but too young, too crazy"  
(Poland consumer)



"Is this Eurovision? I don't think anyone really cares about that. It isn't a reason to go to the country"  
(UK consumer)



"This looks like a political rally! Why would I want to go there"  
(Germany consumer)



# And those that didn't...

"I get they are the colours of the Ukraine flag but it is not really clear what this is or what the message is" (Opinion Former)



"There are better ways of promoting business in Ukraine. This does not really speak to investors or consumers" (Opinion Former)



# SUMMARY & RECOMMENDATIONS



# Based on feedback throughout the research, some clear rules of were established



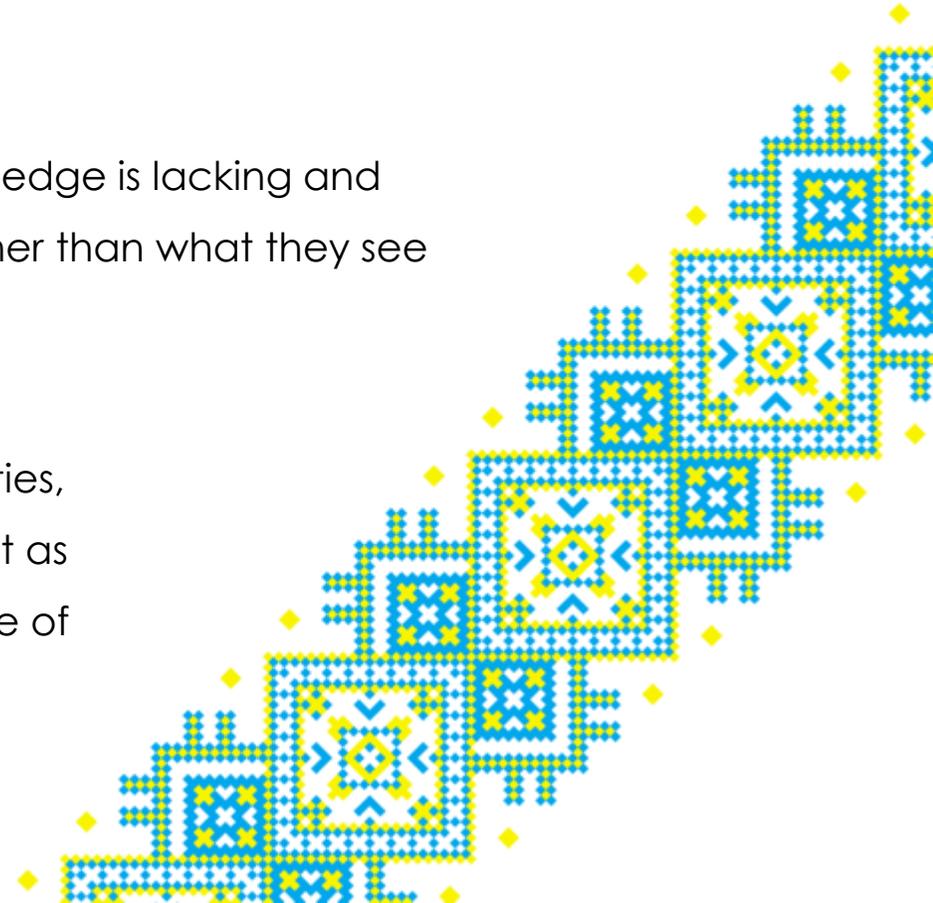
Proceed with extreme caution when showing and talking about people – focus on gentle, kind, friendly individuals, not powerful, progressive groups



Show people what Ukraine looks like and where it is. This basic knowledge is lacking and without it people cannot form an image of Ukraine in their mind (other than what they see and hear in the media)



Don't pretend to be something you're not – yes you have vibrant cities, and a growing industry etc. but that's not all Ukraine is about. It is just as much about the undiscovered and unspoilt opportunities, and range of culture, both old and new



# We have no qualms in recommending 'Opportunity Ukraine' as the preferred route, but development is needed

The strength of 'Opportunity Ukraine' is the permission it gives us to talk about the new and the interesting, it gives scope for education, and a clear space to shout about natural and commercial strengths

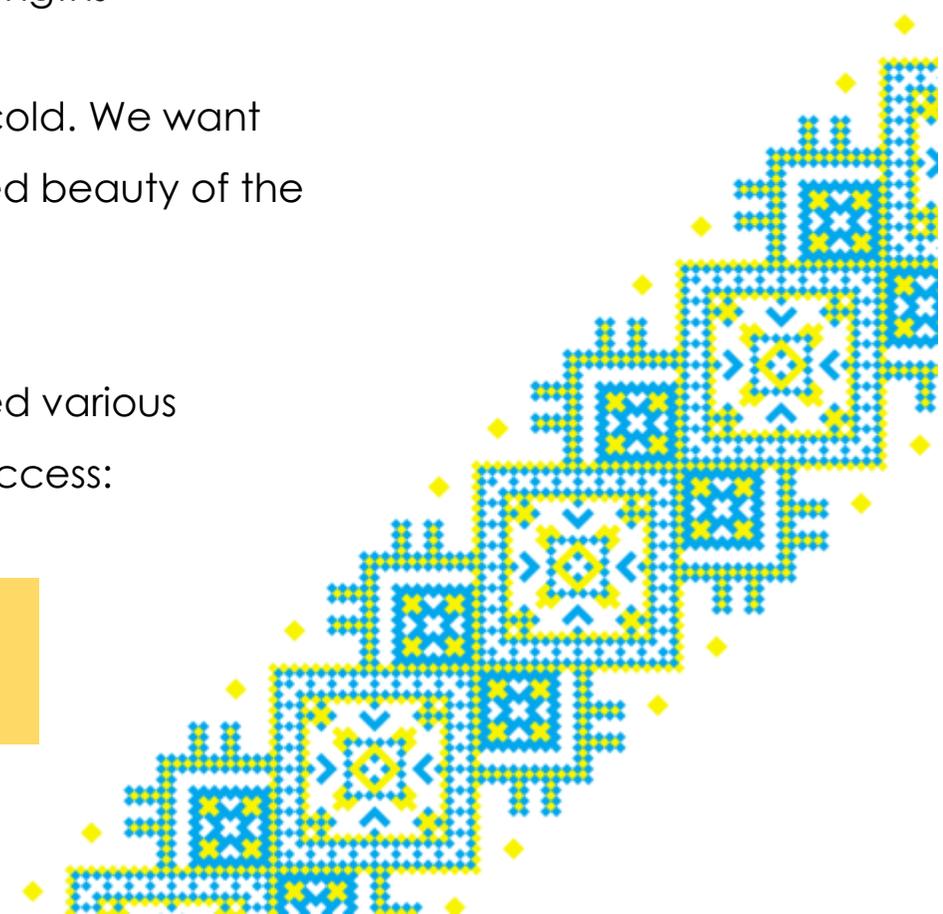
But, is 'opportunity' the right word? The sentiment is correct but the phrase is cold. We want something which communicates the potential of an unspoilt and undiscovered beauty of the country, need we be so overt in saying 'opportunity'?

This is a challenge for creative, consumers and opinion formers themselves tried various articulations which they believed may work better, with varying degrees of success:

**Discover**

**Unveil**

**Golden**



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