MORNING CONSULT

POLITICAL INTELLIGENCE

Tracking Global Opinion on the Russia-Ukraine Crisis

FEBRUARY 2022

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IN THIS REPORT

5 Executive Summary

7 The View from the U.S.

32 The View from Europe

55 The View from Russia

59 Appendix & Methodology

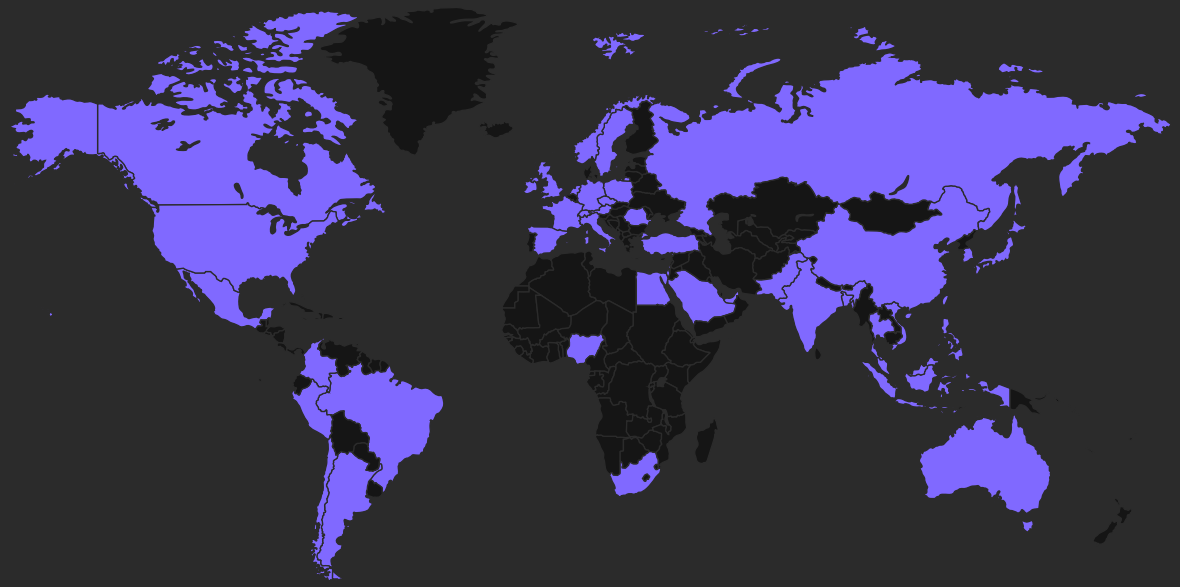
POLITICAL INTELLIGENCE

ABOUT OUR HIGH-FREQUENCY SURVEY RESEARCH DATA

Morning Consult conducts 30,000 surveys in 44 countries every day, making it the largest unified dataset on geopolitical risk in the world.

Every day, we gauge public opinion on world leaders, elections, politicians, and policy issues to provide customers with data at the scale and speed needed to navigate the changing geopolitical landscape and assess political risk.

LEARN MORE



Conducting 30,000 Daily Interviews In:

- United States
- China
- Japan
- Germany
- United Kingdom
- France
- India
- Italy
- Brazil
- Canada
- South Korea
- Russia
- Australia
- Spain
- Mexico
- Argentina
- Chile
- Colombia
- Peru
- Austria
- Belgium
- Czech Republic
- Ireland
- Netherlands
- Norway
- Poland
- Romania
- Sweden
- Switzerland
- Nigeria
- South Africa
- Egypt
- Israel
- Pakistan
- Saudi Arabia
- Turkey
- UAE
- Bangladesh
- Indonesia
- Malaysia
- Philippines
- Singapore
- Thailand
- Vietnam

ABOUT MORNING CONSULT

Morning Consult is a global decision intelligence company changing how modern leaders make smarter, faster, better decisions. The company pairs its proprietary high-frequency data with applied artificial intelligence to better inform decisions on what people think and how they will act.

As Russian troops assemble on the Ukrainian border, Morning Consult is tracking how this is affecting global public opinion, economic sentiment and political attitudes. The following report puts that data into context across the United States, Europe, and Russia to help government and political leaders understand public opinion as the situation evolves.

KEY TAKEAWAYS

United States

American voters prefer negotiations and sanctions to troop deployment when it comes to preventing a Russian invasion of Ukraine. If Russia does invade, American voters prefer imposing sanctions to deploying troops across nearly all Russian invasion scenarios, including Russia deposing Zelensky and occupying the Donbas and/or all of Eastern Ukraine. The sole exception is a complete Russian takeover and occupation of Ukraine, in which case Americans support sending troops. If the U.S. imposes sanctions, Americans want a maximal approach.

Europe

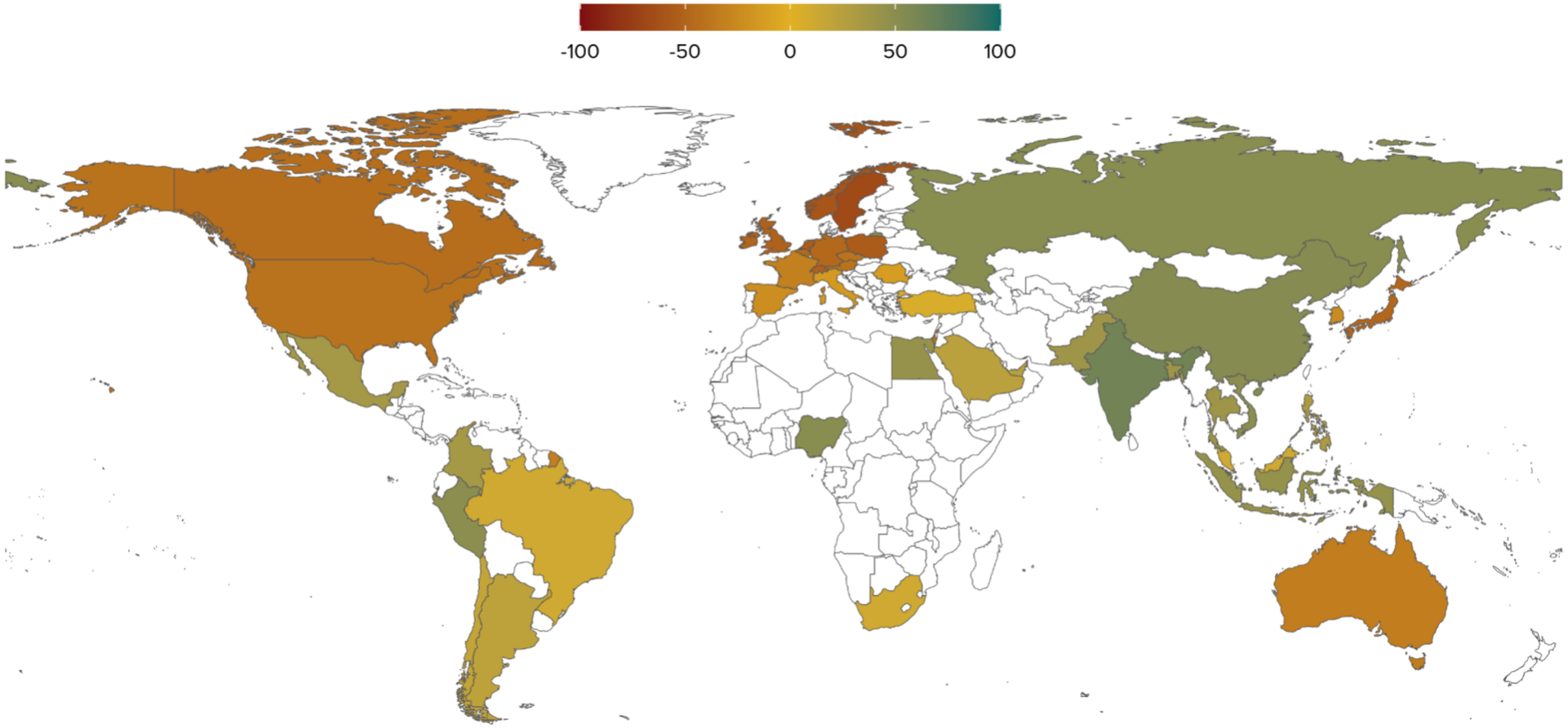
Adults in major European markets hold generally unfavorable opinions of Russia amidst the Ukraine crisis, and most adults among the region's major geopolitical players – France, Germany and the UK – have heard about a potential Russian invasion. The bulk of respondents in those countries support sanctions if Russia invades, but they are substantially less enthusiastic than Americans about keeping the door open to NATO membership, and highly uncertain about their support for cancelling Nord Stream 2.

Russia

Key metrics of Russian sentiment suggest that Russians are relatively unfazed by the threat of sanctions and war with Ukraine. Russians continue to think their country is moving in the right direction on net, per Morning Consult's Country Trajectory data. Consumer confidence has similarly remained relatively flat, per Morning Consult's Index of Consumer Sentiment for Russia.

RUSSIA GLOBAL REPUTATION

Share of adults with favorable minus unfavorable impression of Russia



Sweden	-68
Norway	-61
Netherlands	-56
Poland	-56
Switzerland	-53
United Kingdom	-52
Ireland	-50
Japan	-49
Germany	-48
Belgium	-47
Canada	-44
Austria	-41
Israel	-41
United States	-41
Czech Republic	-40
Australia	-34
France	-32
South Korea	-25
Singapore	-24
Spain	-23
Italy	-16
Romania	-13
Turkey	6
Brazil	11
Malaysia	11
South Africa	11
Chile	18
Argentina	22
Saudi Arabia	23
United Arab Emirates	25
Philippines	32
Colombia	35
Mexico	36
Bangladesh	40
Pakistan	40
Thailand	40
Egypt	44
Indonesia	45
Peru	50
Vietnam	50
Nigeria	52
Russia	52
China	54
India	64

Morning Consult conducted this poll Jan 8 – Feb 6, 2022 among a sample of 71,714 Adults Globally.

SECTION 1

THE VIEW FROM THE UNITED STATES

Tracking Global Opinion on the Russia-Ukraine Crisis

THE VIEW FROM THE U.S.

American voters prefer negotiations and sanctions to troop deployment when it comes to preventing a Russian invasion of Ukraine. If Russia does invade, American voters prefer imposing sanctions to deploying troops across nearly all Russian invasion scenarios, including Russia deposing Zelensky and occupying the Donbas and/or all of Eastern Ukraine. The sole exception is a complete Russian takeover and occupation of Ukraine, in which case Americans support sending troops. If the U.S. imposes sanctions, Americans want a maximal approach. American voters' favorability toward Russia is currently at its lowest reading since the beginning of Q4/2021.

THE VIEW FROM THE U.S.

Awareness and Concern

76% of American voters have heard at least something about a potential Russian invasion of Ukraine; 72% of voters are at least somewhat concerned about it.

Deteriorating Views of Russia

While Americans' views of Russia have always been unsympathetic, they've continued to deteriorate further in recent weeks.

Support for A Diplomatic Solution

Among broad policy options currently on the table to prevent an invasion, American voters prefer negotiations (35%) and sanctions (32%) to a military solution (14%), whether unilaterally or via NATO.

Sending Weapons and Troops Pre-Invasion

American voters are split on whether the U.S. should send additional weapons to Ukraine while negotiations with Russia continue, but a plurality prefer to avoid sending additional troops (49%).

Unilateral vs. NATO Deployment

If the U.S. does send additional troops – whether to Eastern Europe or directly to Ukraine – American voters strongly prefer to do so as part of NATO coalition.

Policy Compromises

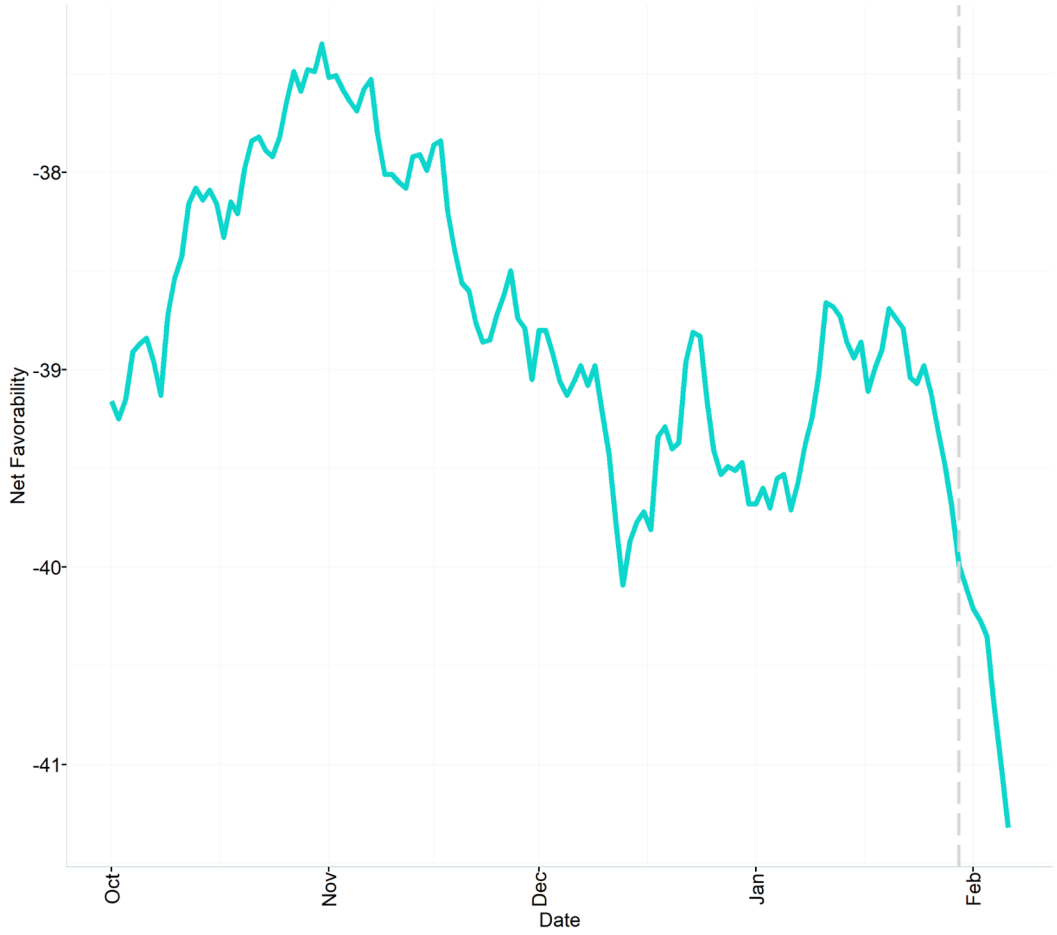
American voters prefer to not close the door on Ukrainian membership in NATO to prevent Russia from invading. But they are more uncertain about the value of other potential compromises that could prevent a Russian invasion, including reducing U.S. missile and troop deployments in Europe and ceding control of Ukraine's Donbas region to Russia.

Maximal Sanctions

If the U.S. imposes sanctions, a majority of voters with an opinion on the issue support a maximal approach that hits major banks/companies with government ties and limits Russia's access to semiconductors; 66% also want to ban Russia from Swift.

WEEKLY TRACKING: U.S. PUBLIC OPINION, FAVORABILITY TOWARD RUSSIA

Net Favorability Toward Russia, 10/1/21–2022/YTD

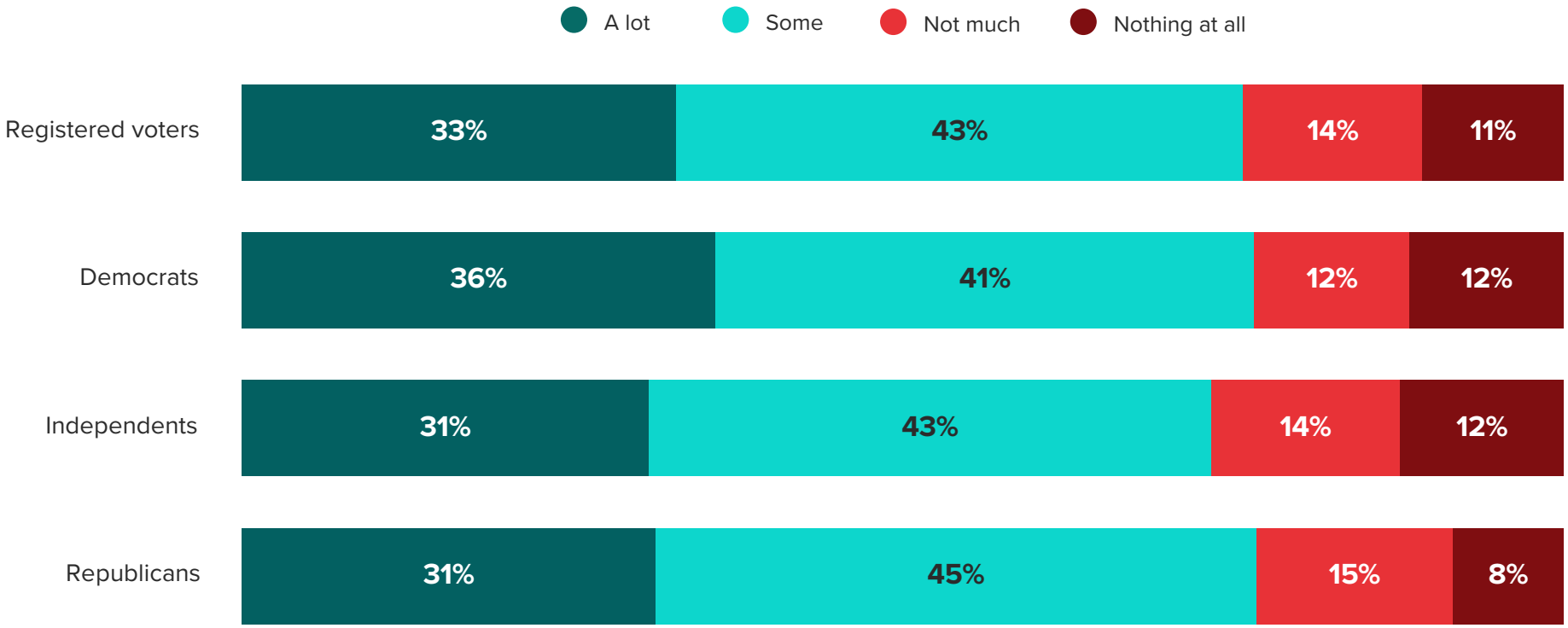


Data from 6 Feb. 2022 (30-day SMA)	Favorable	Unfavorable	DKNO	Net favorability	WoW +/- (pct points)
Adults	15.67	56.99	3.03	-41.32	-1.33
Age: 18-34	25.28	37.94	4.9	-12.66	-1.3
Age: 35-44	21	46.91	3.49	-25.91	-1.52
Age: 45-64	11.03	63.33	2.83	-52.3	-0.7
Age: 65+	4.7	83.06	0.17	-78.36	-2.19
Liberal	17.21	63.45	2.61	-46.24	-1.99
Conservative	15.56	65.52	1.98	-49.96	-1.01
Leader: Approve	19.74	57.29	3.4	-37.55	-1.15
Leader: Disapprove	12.77	62.21	1.86	-49.44	-1.19
Policy Elite	16	74.14	2.22	-58.14	-0.43
Financial Elites	17.79	73.31	0.69	-55.52	-1.05
Military HH: Yes	15.41	65.63	1.17	-50.22	-0.65
Military HH: No	15.72	55.45	3.36	-39.73	-1.43
PID: Dem (no lean)	17.21	58.65	3.62	-41.44	-2.07
PID: Rep (no lean)	14.65	63.87	1.29	-49.22	-1.12

Dashed vertical line in figure indicates date one week prior. Values in table may not add up to 100% as "Heard of, No opinion" responses were not included.

A MAJORITY OF U.S. VOTERS HAVE HEARD AT LEAST SOMETHING ABOUT POTENTIAL UKRAINE INVASION

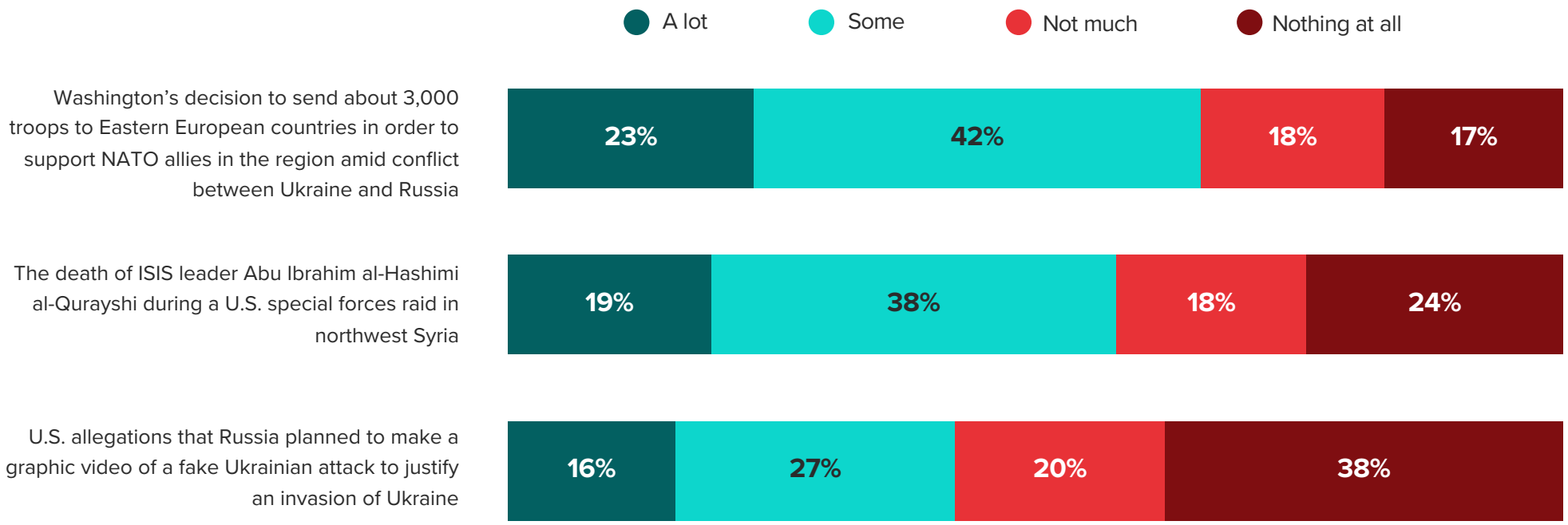
Respondents were asked how much they have heard about a potential Russian invasion of Ukraine



Poll conducted Feb. 7, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

3 IN 5 AMERICANS ARE AWARE THAT WASHINGTON SENT TROOPS TO EASTERN EUROPE. FEWER HAVE HEARD ABOUT RUSSIAN VIDEO DISINFORMATION EFFORTS

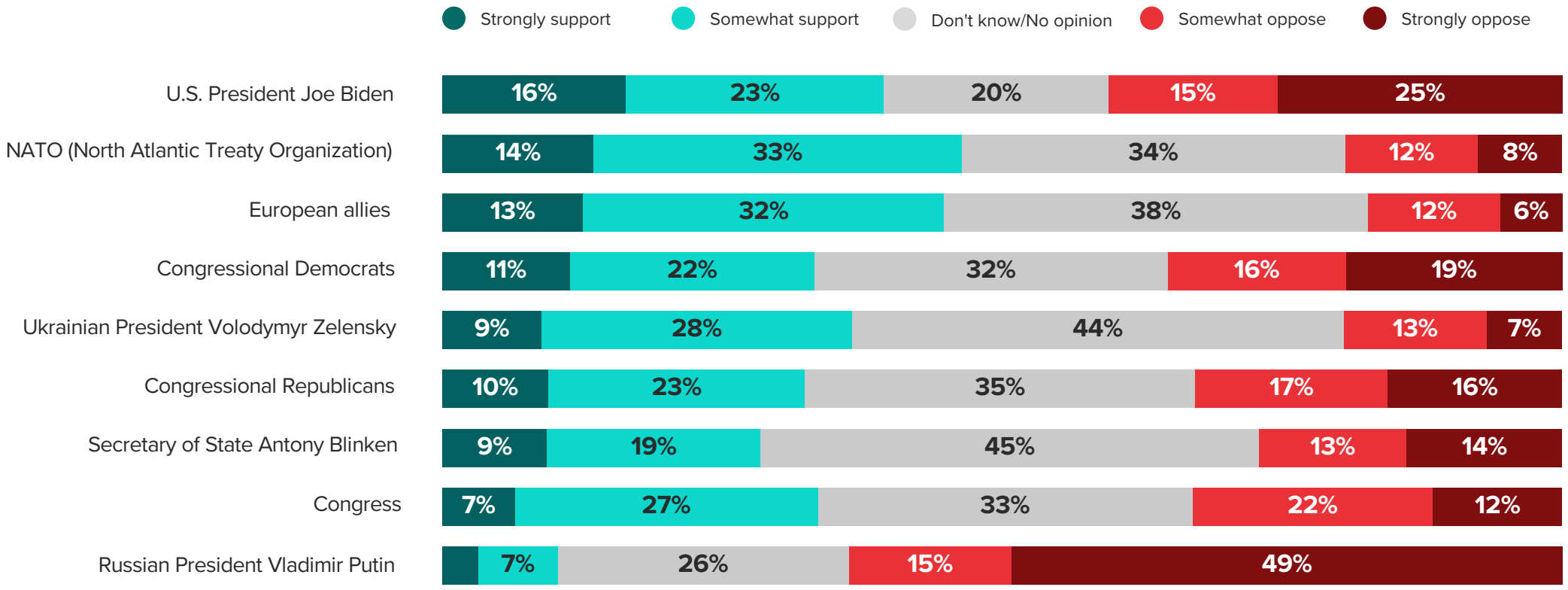
Voters were asked how much they have seen, read and heard about the following Ukraine-related events, and the the death of Abu Ibrahim al-Hashimi (included to facilitate comparison):



Poll conducted Feb. 5-6, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

AMERICAN VOTERS ARE SPLIT ON BIDEN'S HANDLING OF THE CRISIS, BUT PLURALITIES APPROVE OF EUROPEAN EFFORTS

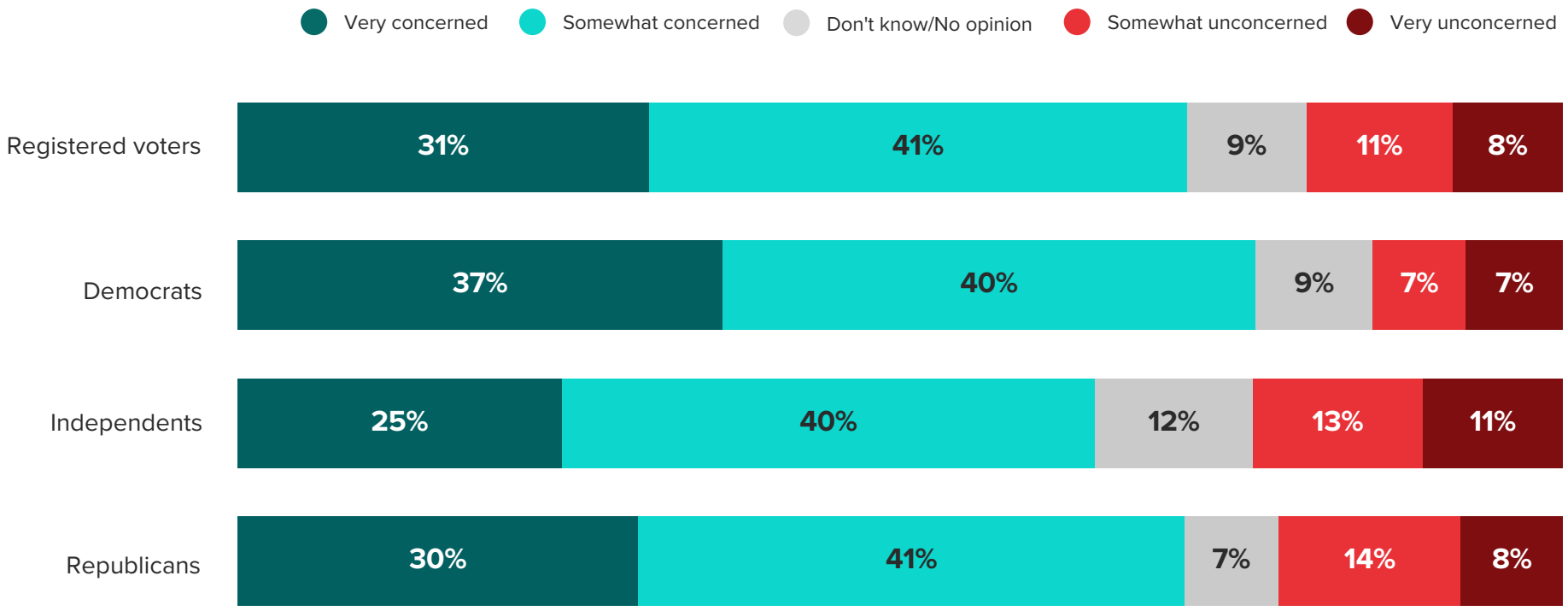
Respondents were asked whether they approve of how each of the following is handling the conflict between Ukraine and Russia:



Poll conducted Feb. 5-6, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

MOST VOTERS ARE CONCERNED ABOUT POSSIBLE RUSSIAN INVASION OF UKRAINE, BUT DEMOCRATS ARE SLIGHTLY MORE CONCERNED THAN REPUBLICANS

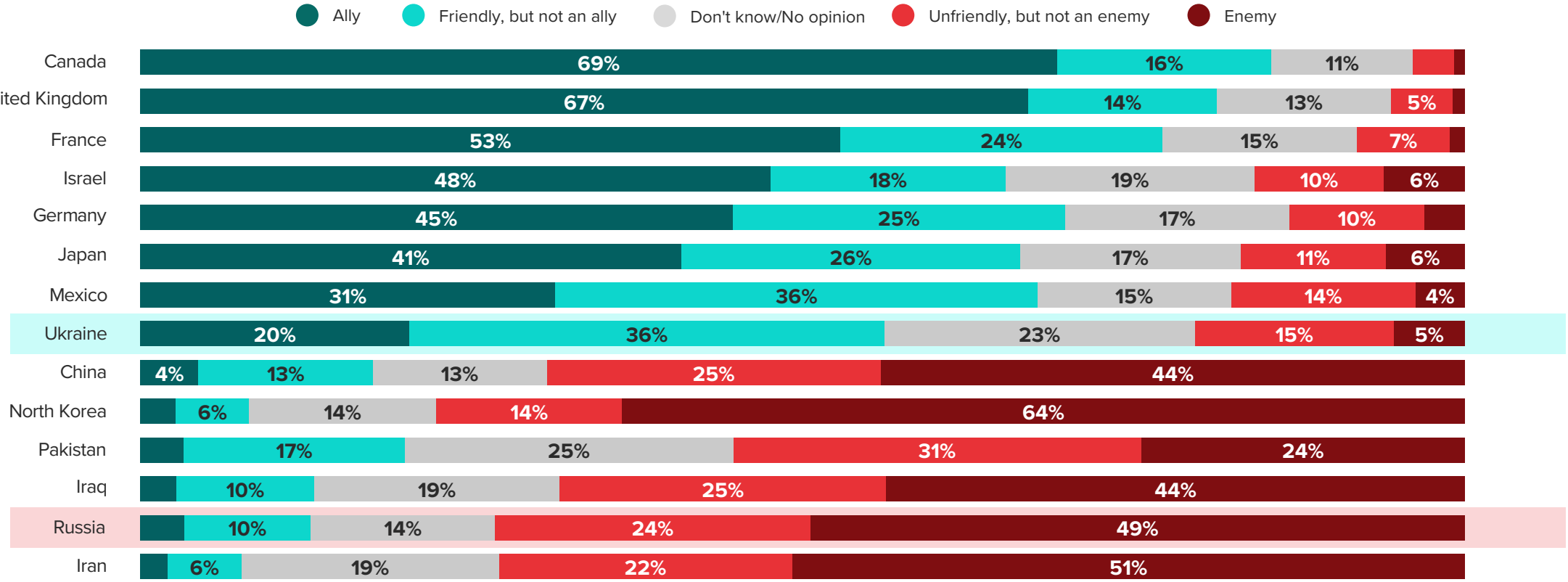
Respondents were asked how concerned they are about a potential Russian invasion of Ukraine



Poll conducted Feb. 5-6, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

MAJORITIES OF U.S. VOTERS SEE UKRAINE AS A FRIENDLY NATION AND SEE RUSSIA AS UNFRIENDLY.

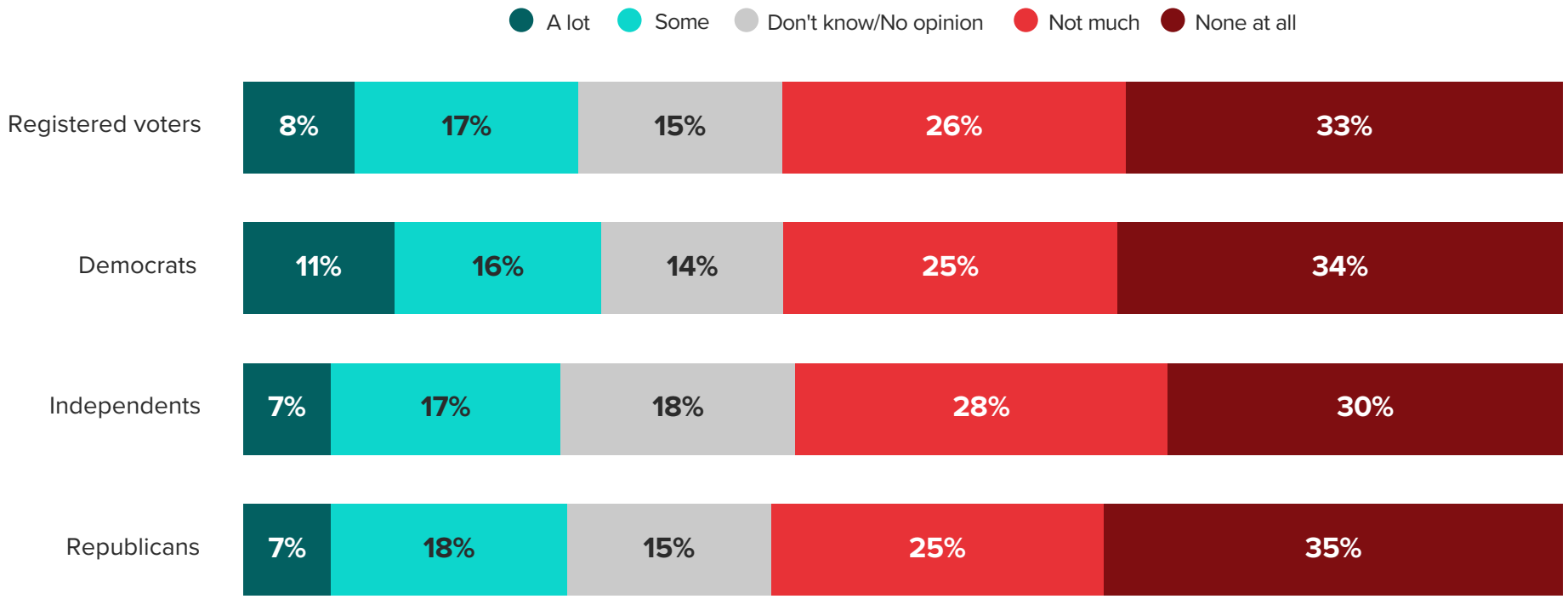
Voters were asked whether they think Ukraine and Russia are friendly/unfriendly, as well as an ally/enemy of the United States



Poll conducted Feb. 5-6, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

BOTH DEMOCRATS AND REPUBLICANS WOULD PREFER LITTLE TO NO RUSSIAN INFLUENCE IN NEIGHBORING COUNTRIES — INCLUDING UKRAINE

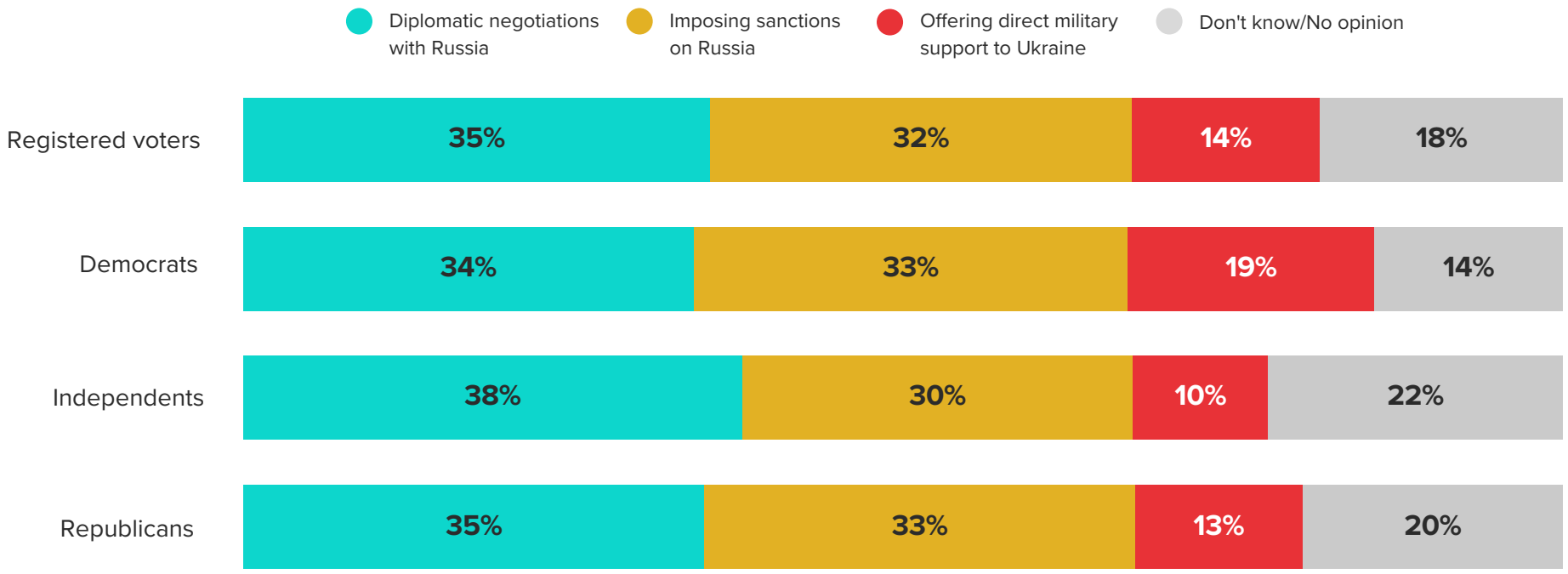
Respondents were asked how much influence they think Russia should have in neighboring countries such as Georgia, Kazakhstan and Ukraine



Poll conducted Feb. 7, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

WHILE AMERICANS ARE SPLIT ON DIPLOMACY OR SANCTIONS AS A MEANS OF DETERRING RUSSIAN INVASION, THERE IS LESS ENTHUSIASM FOR OFFERING UKRAINE DIRECT MILITARY SUPPORT

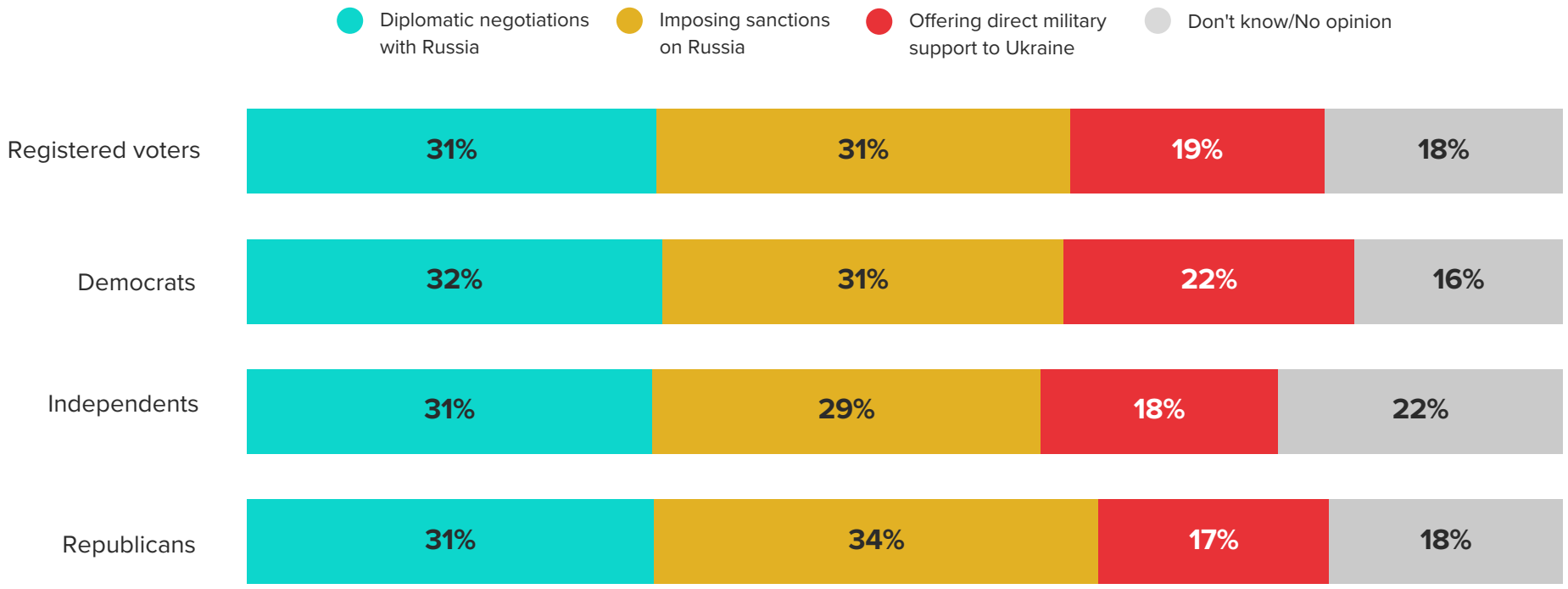
Respondents were asked which of the following actions they prefer in an attempt to reduce the likelihood that Russia invades Ukraine:



Poll conducted Feb. 7, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

WHEN IT COMES TO NATO-LED ACTIONS, 3 IN 10 U.S. VOTERS EACH BACK NEGOTIATIONS OR SANCTIONS ON RUSSIA, WHILE 19% WANT MILITARY SUPPORT FOR UKRAINE

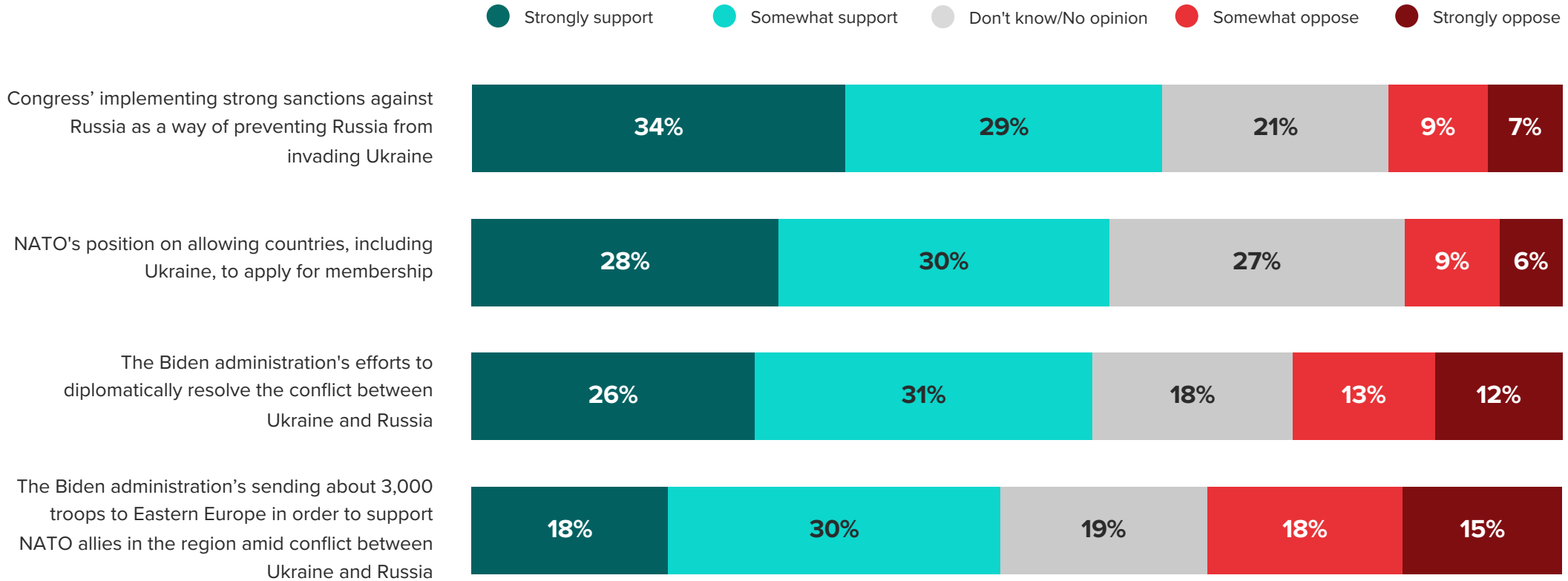
Respondents were asked which of the following NATO-led actions they prefer in an attempt to reduce the likelihood that Russia invades Ukraine:



Poll conducted Feb. 7, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

WHILE NEARLY HALF OF VOTERS BACK SENDING U.S. TROOPS TO EASTERN EUROPE, MORE SUPPORT OTHER POLICY OPTIONS

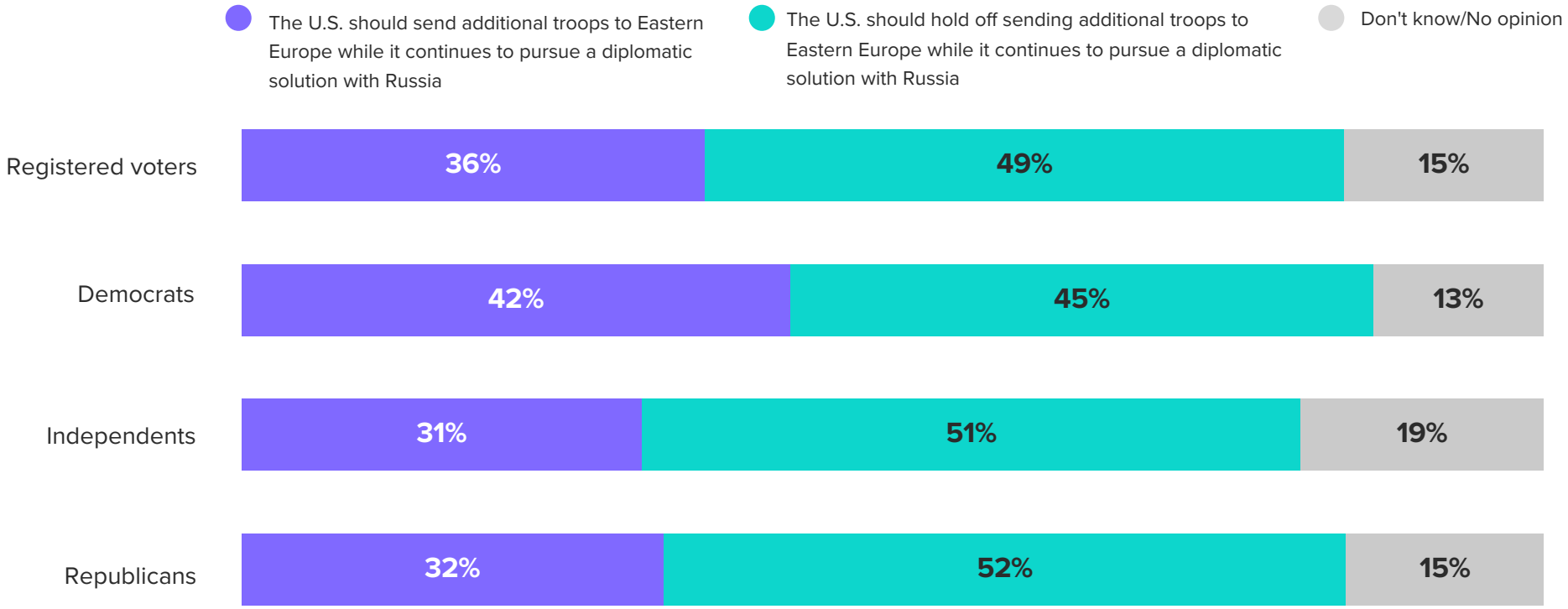
Voters were asked how much they support or oppose the following policy options to address the Ukraine situation:



Poll conducted Feb. 5-6, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

NEARLY 1 IN 2 AMERICANS THINK THE U.S. SHOULD DELAY SENDING ADDITIONAL TROOPS TO EASTERN EUROPE WHILE IT NEGOTIATES WITH RUSSIA

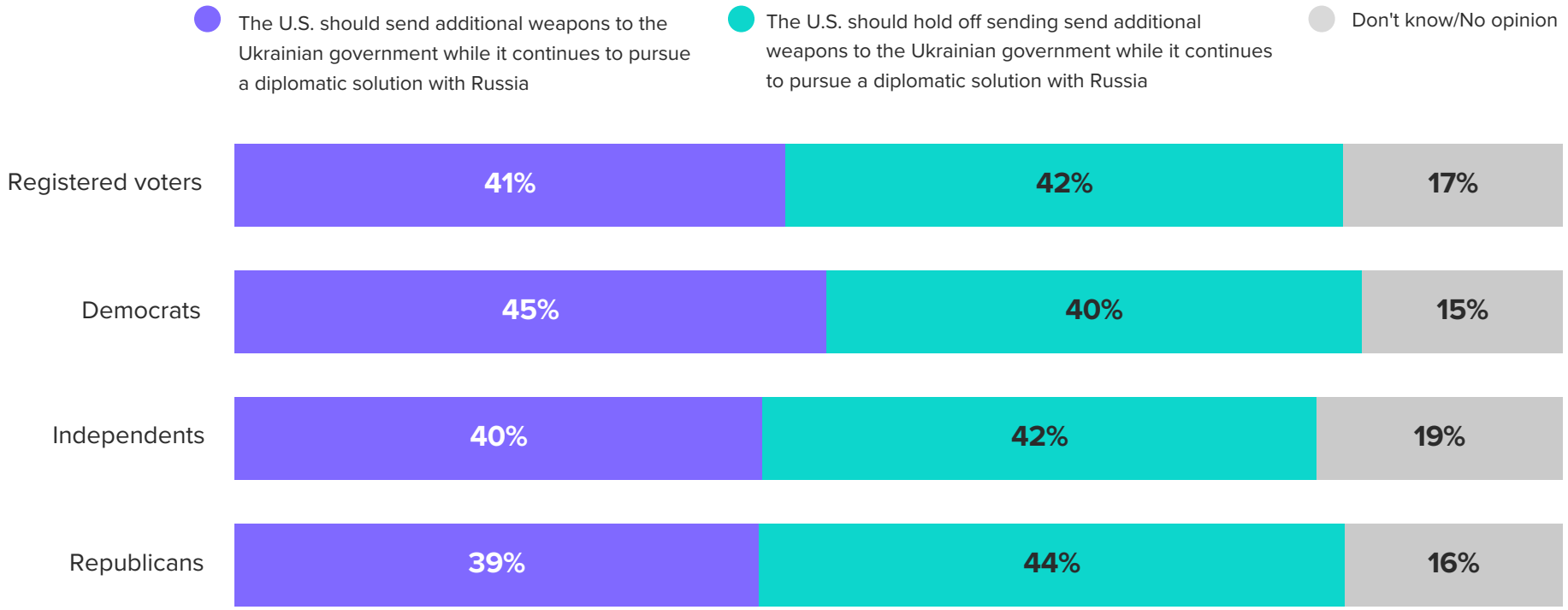
Respondents were asked if they support sending additional troops to Eastern Europe while negotiations continue, or if the U.S. should hold off



Poll conducted Feb. 7, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

AMERICANS ARE SPLIT ON WHETHER THE U.S. SHOULD SEND ADDITIONAL WEAPONS TO UKRAINE WHILE DIPLOMATIC NEGOTIATIONS CONTINUE

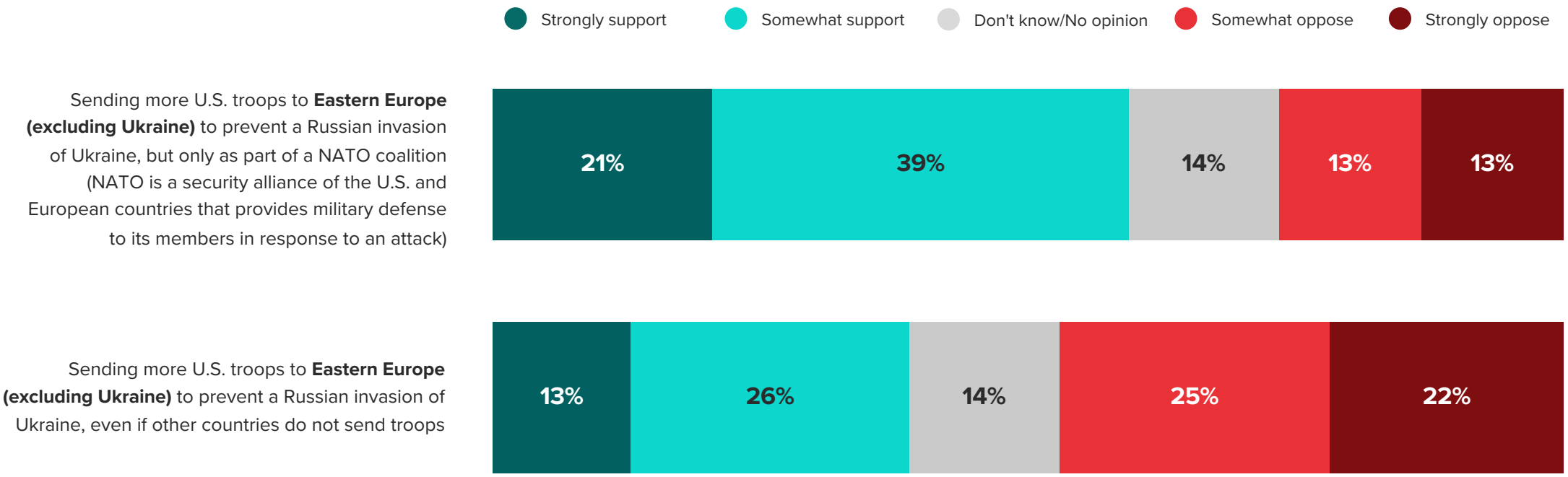
Respondents were asked if they support sending additional weapons to Ukraine while negotiations continue, or if they believe the U.S. should hold off



Poll conducted Feb. 7, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

3 IN 5 AMERICANS SUPPORT SENDING MORE U.S. TROOPS TO EASTERN EUROPE AS PART OF A NATO COALITION, BUT THEY'RE MORE HESITANT ABOUT UNILATERAL TROOP DEPLOYMENT

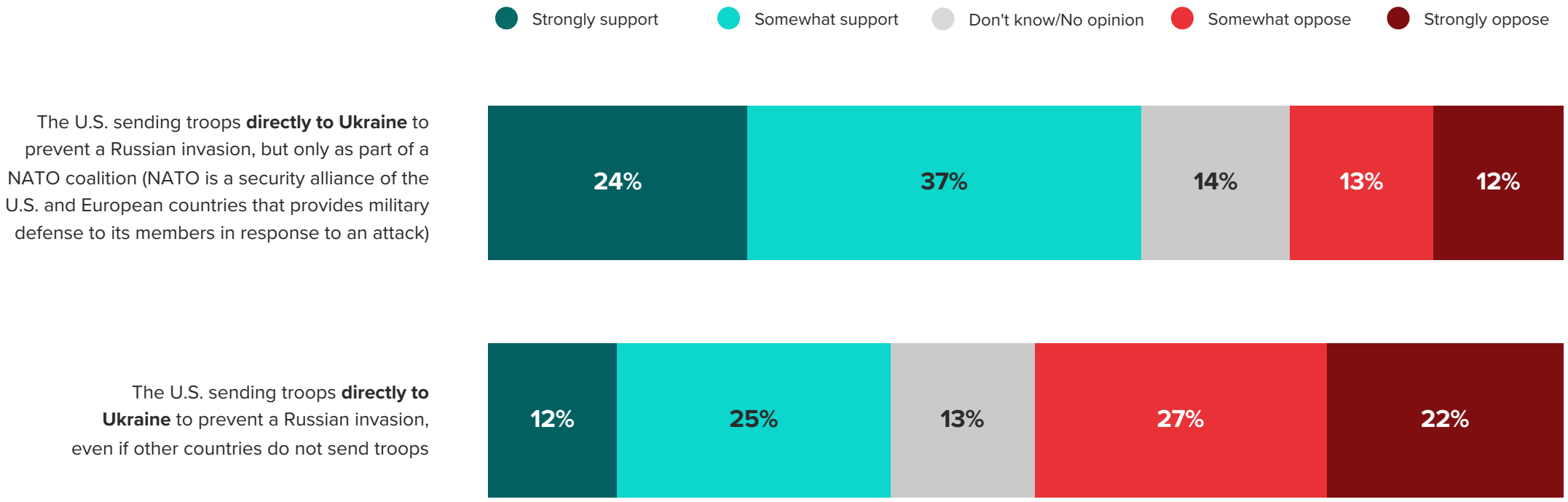
Respondents were asked whether they support or oppose...



Poll conducted Feb. 7, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

MOST AMERICANS SUPPORT SENDING MORE U.S. TROOPS DIRECTLY TO UKRAINE AS PART OF A NATO COALITION, BUT FEWER BACK UNILATERAL TROOP DEPLOYMENT

Respondents were asked whether they support or oppose...



Poll conducted Feb. 7, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

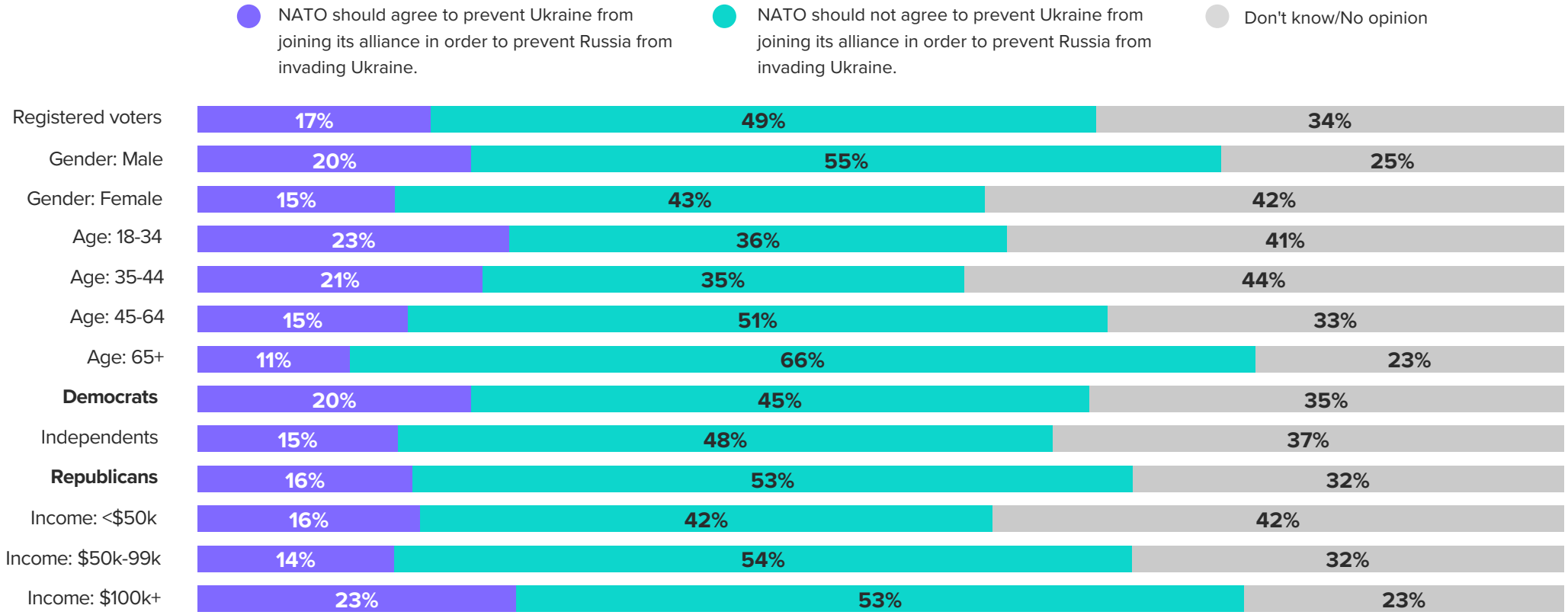
NEARLY HALF OF AMERICAN VOTERS THINK NATO SHOULD NOT ACQUIESCE TO RUSSIAN DEMANDS TO PROHIBIT UKRAINIAN MEMBERSHIP

Voters were asked if NATO should allow Ukraine to join if banning membership would prevent Russia from invading

Poll conducted Feb. 5-6, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

BULK OF DEMOCRATS, REPUBLICANS SUPPORT KEEPING NATO MEMBERSHIP OPEN TO UKRAINE

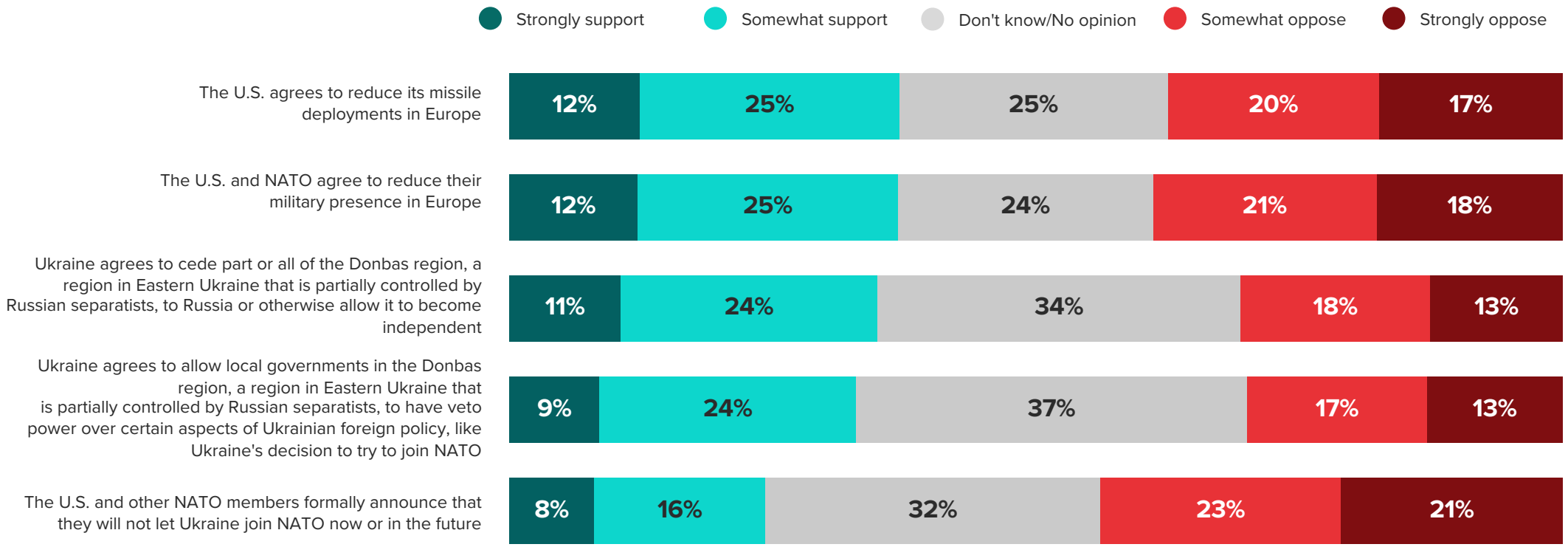
Voters were asked if NATO should allow Ukraine to join if banning membership would prevent Russia from invading



Poll conducted Feb. 5-6, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

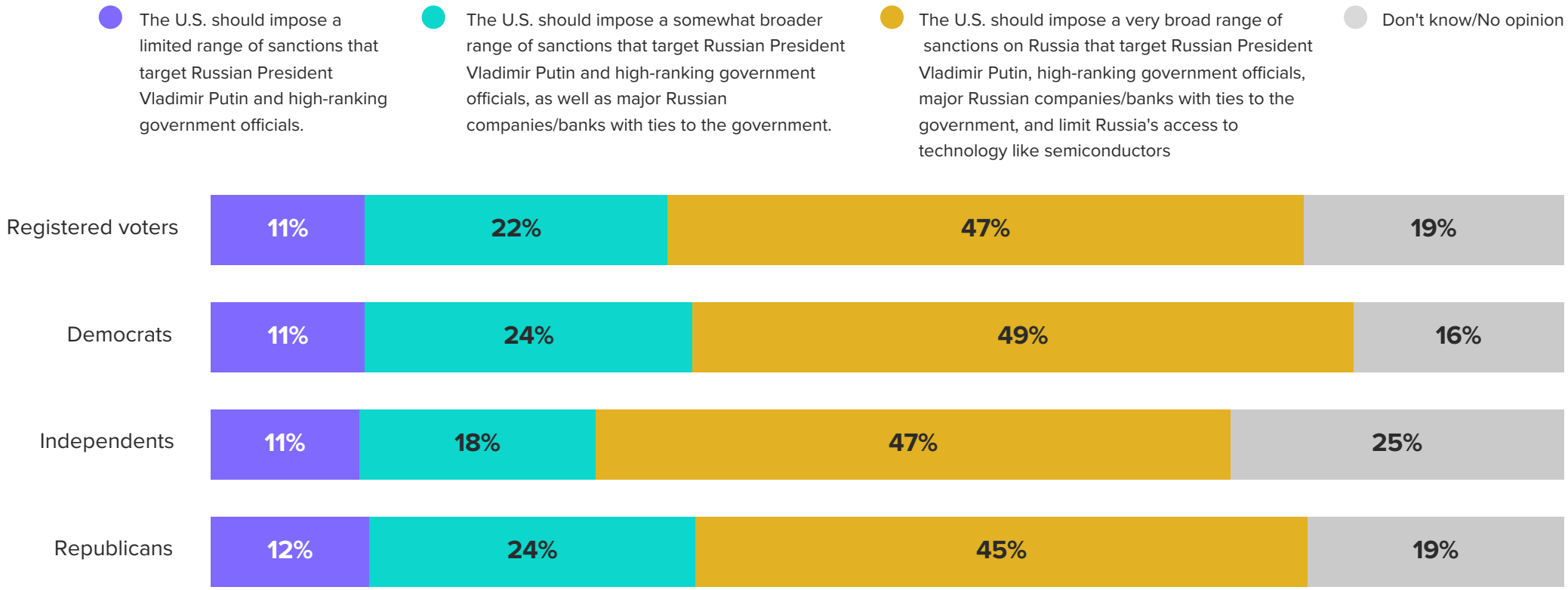
PLURALITY OF AMERICANS OPPOSE NATO'S ANNOUNCING THAT IT WILL NOT LET UKRAINE JOIN NOW OR IN THE FUTURE, BUT THEY'RE SPLIT ON WHETHER TO SUPPORT OTHER POTENTIAL COMPRISES TO PREVENT RUSSIAN INVASION

Respondents were asked about their support for the following possible compromises to prevent Russia from invading Ukraine:



Poll conducted Feb. 7, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

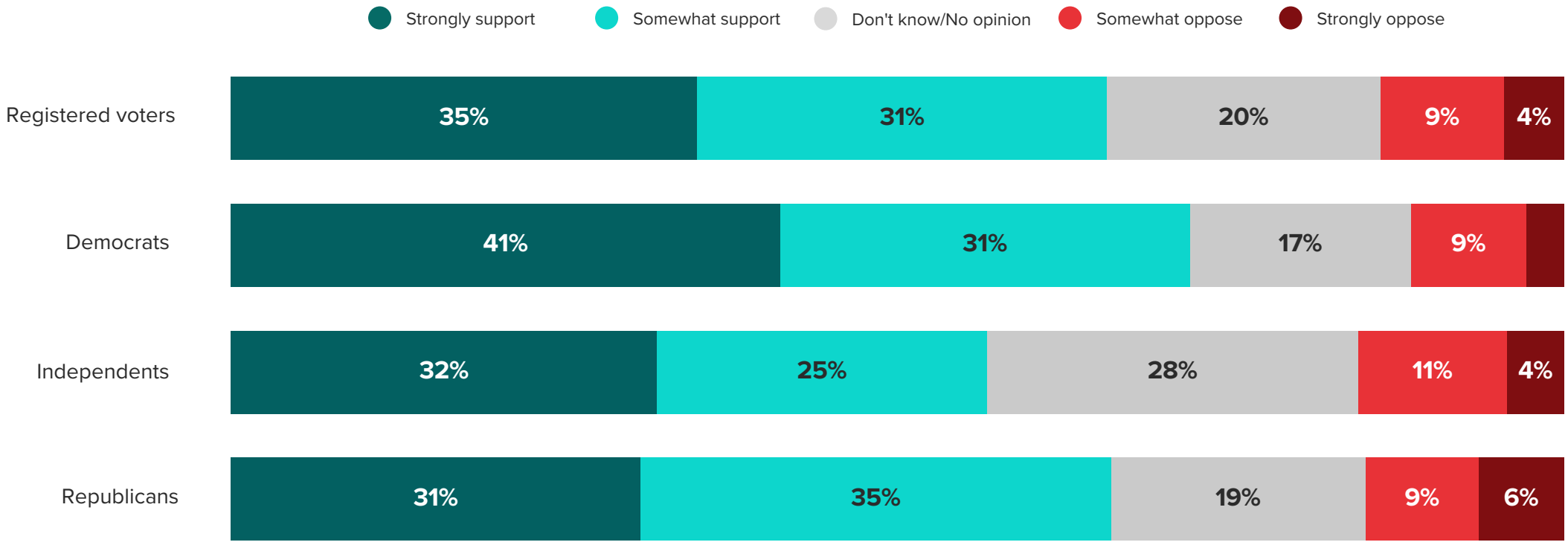
ALMOST HALF OF AMERICANS WANT BROAD SANCTIONS TARGETING PUTIN, GOVERNMENT OFFICIALS AND MAJOR RUSSIAN COMPANIES OR BANKS



Poll conducted Feb. 7, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

2 IN 3 AMERICANS WANT THE U.S. TO BAN RUSSIA FROM THE SWIFT NETWORK IN ORDER TO PREVENT INVASION OF UKRAINE

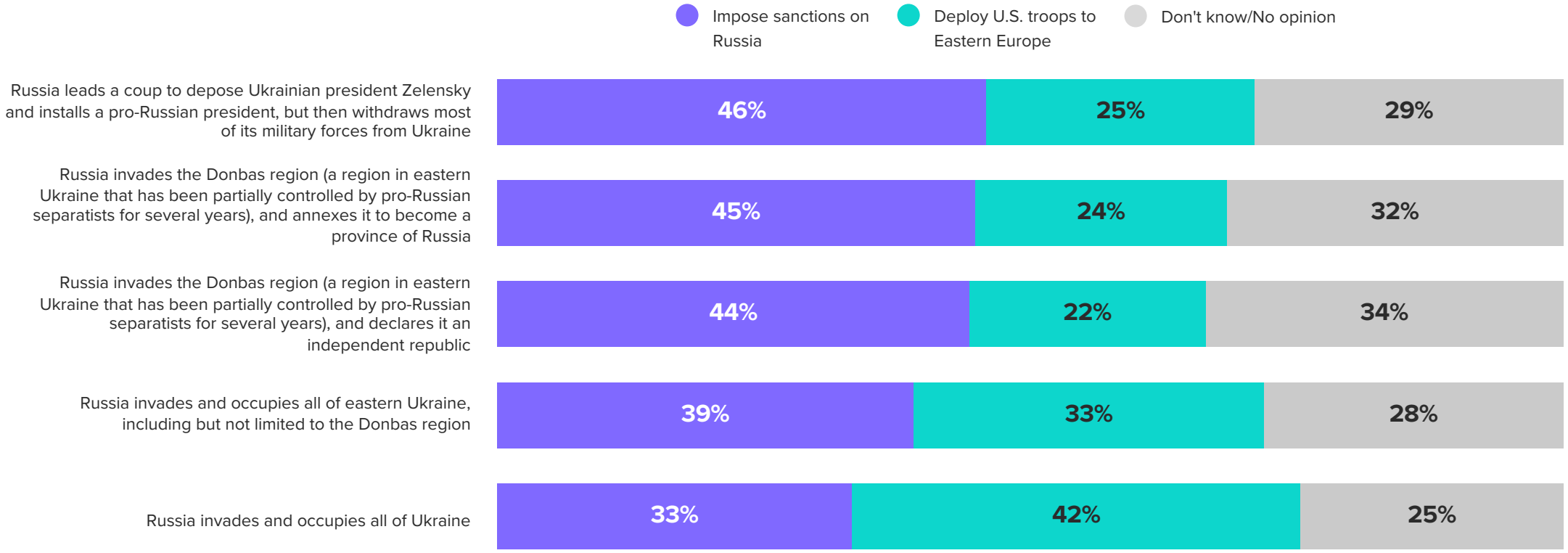
Respondents were asked whether they support U.S. efforts to ban Russia from using the Swift network



Poll conducted Feb. 7, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

AMERICANS LARGELY PREFER IMPOSING SANCTIONS ON RUSSIA TO TROOP DEPLOYMENT — UNLESS RUSSIA FULLY INVADES AND OCCUPIES UKRAINE

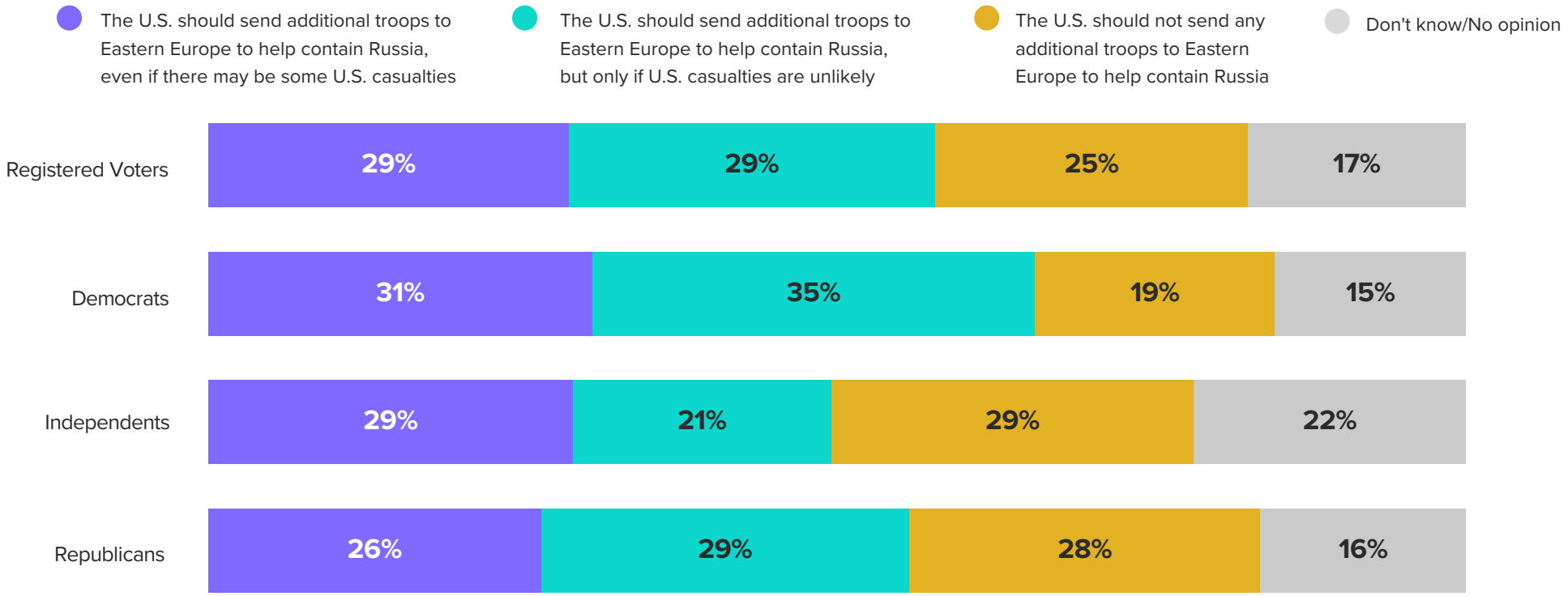
Respondents were asked whether they prefer imposing sanctions on Russia or deploying U.S. troops to Eastern Europe in the following Russian invasion scenarios:



Poll conducted Feb. 7, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

AMERICANS ARE CONFLICTED ABOUT SENDING MORE U.S. TROOPS TO EASTERN EUROPE IF RUSSIA INVADES UKRAINE

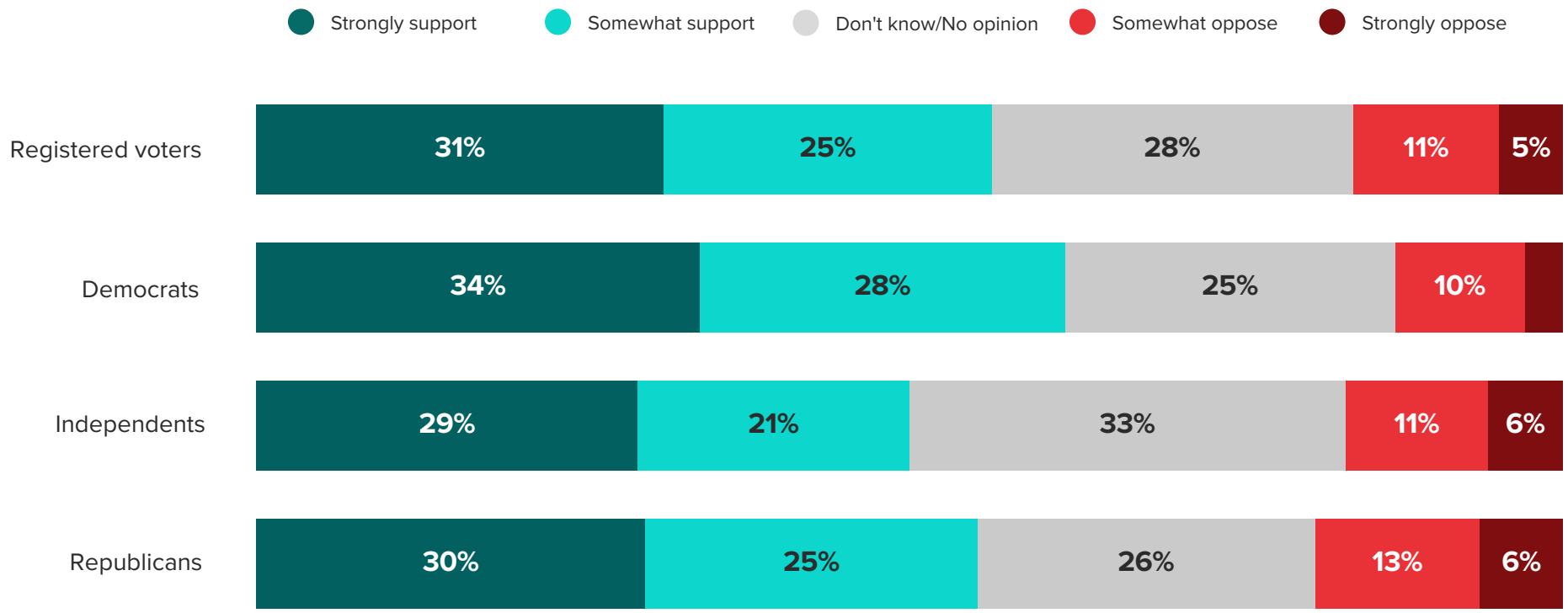
Respondents were asked if they support sending additional troops to Eastern Europe under the following U.S. casualty scenarios if Russia invades Ukraine:



Poll conducted Feb. 7, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

MOST AMERICANS SUPPORT GERMANY'S CANCELING NORD STREAM 2 IF RUSSIA INVADES UKRAINE

Respondents were asked whether they would back Germany's canceling Nord Stream 2



Poll conducted Feb. 7, 2022, among a representative sample of 2,005 registered voters, with an unweighted margin of error of +/-2 percentage points.

SECTION 2

THE VIEW FROM EUROPE

Tracking Global Opinion on the Russia-Ukraine Crisis

THE VIEW FROM EUROPE

Adults in major European markets hold increasingly unfavorable opinions of Russia on net amidst the Ukraine crisis, and most adults among the region's major geopolitical players – France, Germany and the UK – have heard about a potential Russian invasion. The bulk of respondents in those countries support sanctions if Russia invades, but they are substantially less enthusiastic than Americans about keeping the door open to NATO membership, and highly uncertain about their support for cancelling Nord Stream 2.

THE VIEW FROM EUROPE

Favorability Toward Russia

Net favorability toward Russia over 2022/YTD remains negative across major European markets (France, Germany, Italy, Poland, Spain, Sweden, UK) and is at/near its most negative reading since the beginning of Q4/2021 in each market, implying unfavorable sentiment toward Russia on net.

Awareness

Most respondents in major European geopolitical players (France, Germany, and the UK) have heard at least something about a potential Russian invasion of Ukraine. Awareness is highest in Germany (73%).

Russian Influence in Its Neighborhood

German and U.K. adults oppose greater Russian influence in countries in Russia's neighborhood, but French sentiment is less clear-cut.

Cancelling Nord Stream 2

Respondents in France, Germany and the UK are split on their support for canceling Nord Stream 2 if Russia invades Ukraine, including a perfect split in Germany (37% support/oppose cancellation). But uncertainty remains high enough in all three countries that the needle could shift in either direction.

Support for Sanctions

The bulk of respondents in major European geopolitical players (France, Germany, and the UK) back sanctions on Russia if it invades Ukraine, including a bare majority in Germany and the UK, but many remain uncertain.

Ukrainian Membership in NATO

At least 2 in 5 respondents in major European countries (France, Germany, and the UK) are unsure whether NATO should prohibit Ukraine from joining in order to prevent a Russian invasion. The share of European adults expressing support for allowing Ukraine to join NATO is substantially lower than the share of American voters indicating that NATO should not agree to prevent Ukraine from joining in an attempt to prevent a Russian invasion. The finding suggests there is a potentially substantial divergence in sentiment across major transatlantic allies when it comes to Ukrainian membership.

WEEKLY TRACKING: FRENCH PUBLIC OPINION, FAVORABILITY TOWARD RUSSIA

Net Favorability Toward Russia, 10/1/21–2022/YTD

Data from 6 Feb. 2022 (30-day SMA)	Favorable	Unfavorable	DKNO	Net favorability	WoW +/- (pct points)
Adults	18.25	49.84	9.83	-31.59	-2.09
Age (FR): 18-34	27.23	39.53	16.01	-12.3	0.85
Age (FR): 35-44	18.97	44.58	7.66	-25.61	-1.51
Age (FR): 45-64	14.21	54.42	9.21	-40.21	-5.14
Age (FR): 65+	14.68	56.85	6.21	-42.17	-0.77
Liberal	20.12	60.21	5.36	-40.09	-3.37
Moderate	18.18	54.15	12.1	-35.97	0.61
Conservative	23.31	54.17	5.93	-30.86	-0.32
Leader: Approve	17.89	56.71	7.92	-38.82	-2.37
Leader: Disapprove	19.23	48.79	9.65	-29.56	-1.86
Policy Elites	17.7	63.09	3.67	-45.39	-2.02
Financial Elites	18.07	77.7	0	-59.63	-2.65
Military HH: Yes	28.25	44.93	8.4	-16.68	-10.05
Military HH: No	17.47	50.22	9.94	-32.75	-1.48

Dashed vertical line in figure indicates date one week prior. Values in table may not add up to 100% as "Heard of, No opinion" responses were not included.

FRENCH CONSUMER CONFIDENCE REMAINS ABOVE PRE-PANDEMIC LEVELS BUT IS TRENDING LOWER SINCE JULY 2021

Rising prices and COVID-19 surges have weighed on confidence throughout Europe

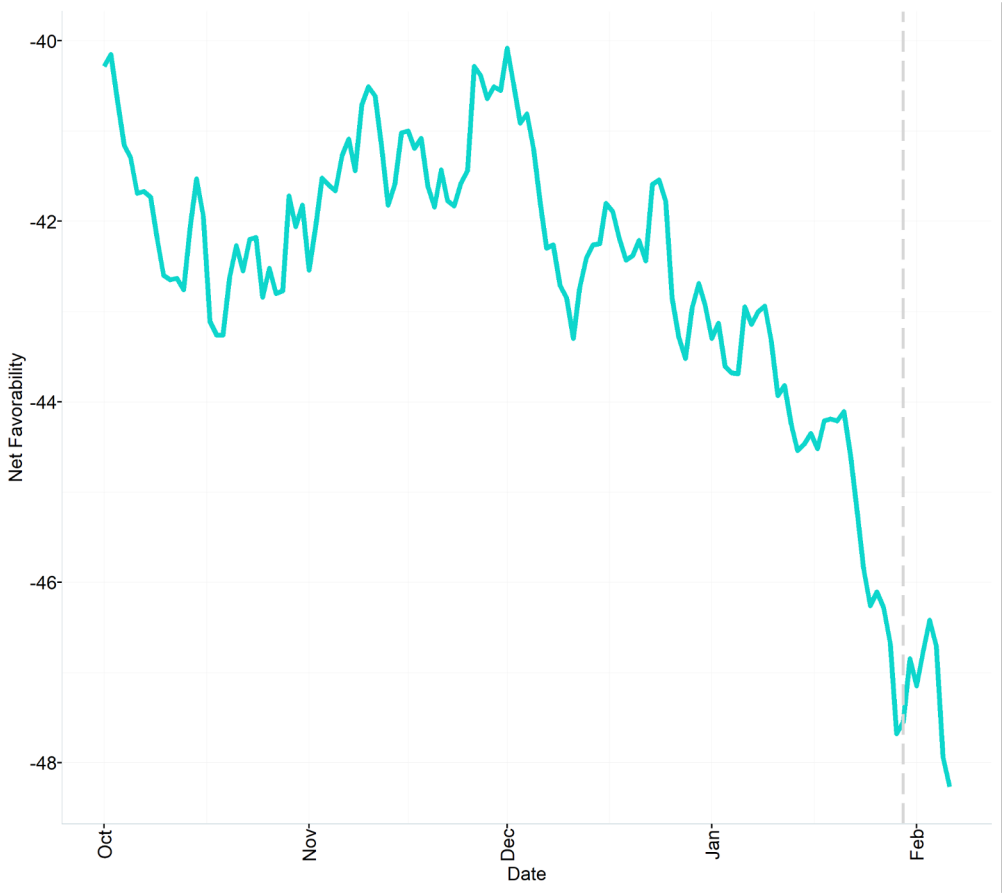
Morning Consult Index of Consumer Sentiment for France

Index of Consumer Sentiment (30-Day Moving Average)

Change by Component (Jan 1 to Feb 6, 2022)

WEEKLY TRACKING: GERMAN PUBLIC OPINION, FAVORABILITY TOWARD RUSSIA

Net Favorability Toward Russia, 10/1/21–2022/YTD



Data from 6 Feb. 2022 (30-day SMA)	Favorable	Unfavorable	DKNO	Net favorability	WoW +/- (pct points)
Adults	17.72	65.99	1.65	-48.27	-0.72
Age (DE): 18-34	28.09	57.34	1.83	-29.25	0.41
Age (DE): 35-44	20.88	62.08	2.12	-41.2	-1.66
Age (DE): 45-64	13.63	65.77	1.22	-52.14	-1.32
Age (DE): 65+	11.47	77.47	1.8	-66	0.26
Liberal	18.75	70.97	1.15	-52.22	-1.53
Moderate	15.86	67.23	1.48	-51.37	-0.44
Conservative	22.37	65.3	0.3	-42.93	1.03
Leader: Approve	16.46	70.29	1.37	-53.83	1.91
Leader: Disapprove	20.65	64.95	1.58	-44.3	-4.9
Policy Elites	16.4	71.94	0.54	-55.54	2.52
Financial Elites	17.8	77.73	0	-59.93	4.6
Military HH: Yes	26.06	69.13	0.62	-43.07	-4.54
Military HH: No	17.15	65.78	1.72	-48.63	-0.47

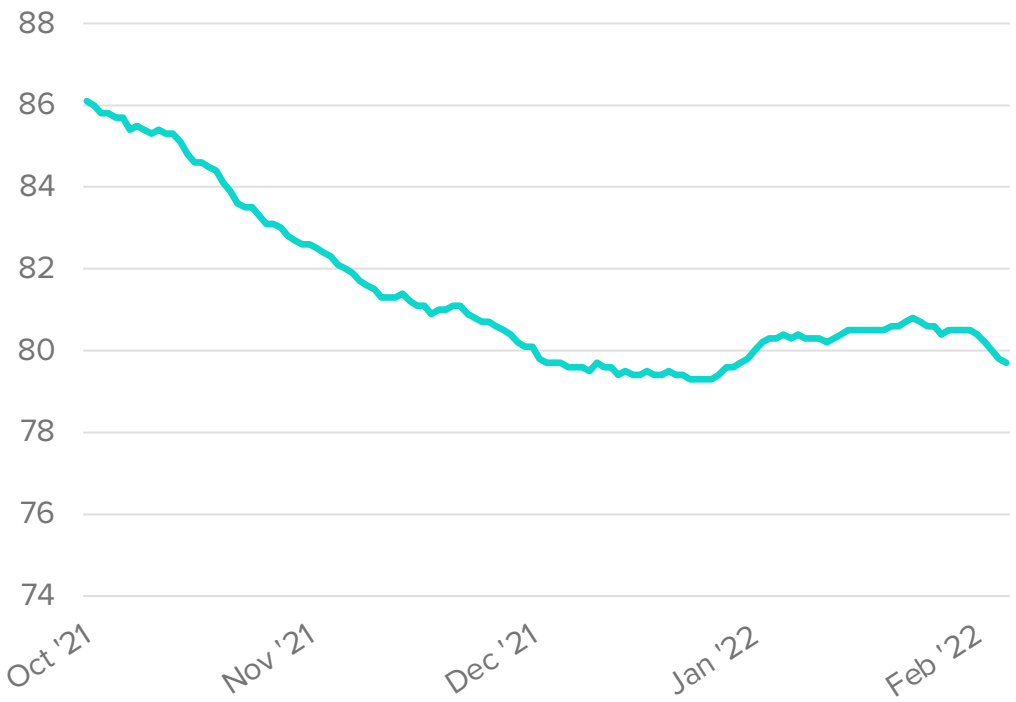
Dashed vertical line in figure indicates date one week prior. Values in table may not add up to 100% as "Heard of, No opinion" responses were not included.

RECOVERY IN GERMAN CONSUMER CONFIDENCE HAS PETERED OUT, WITH RISING PRICES IMPACTING PERCEPTIONS OF BUYING CONDITIONS IN 2022

Energy prices are at core of inflationary pressures, and Germany remains heavily reliant on Russian gas

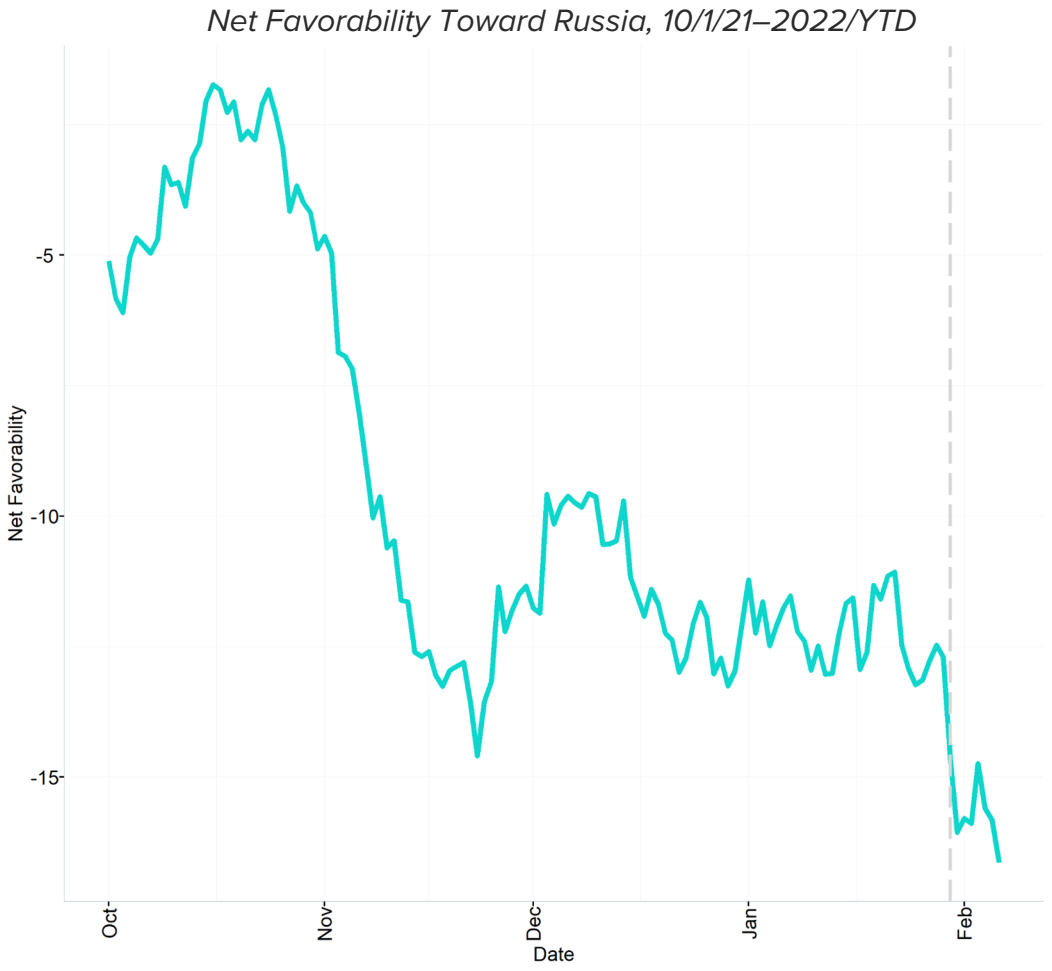
Morning Consult Index of Consumer Sentiment for Germany

Index of Consumer Sentiment (30-Day Moving Average)



Change by Component (Jan 1 to Feb 6, 2022)

WEEKLY TRACKING: ITALIAN PUBLIC OPINION, FAVORABILITY TOWARD RUSSIA



Data from 6 Feb. 2022 (30-day SMA)	Favorable	Unfavorable	DKNO	Net favorability	WoW +/- (pct points)
Adults	30.55	47.19	4.81	-16.64	-2.01
Age (IT): 18-34	35.31	41.12	6.06	-5.81	-1.42
Age (IT): 35-44	33.14	44.04	5.29	-10.9	-9.02
Age (IT): 45-64	29.64	46.52	4.83	-16.88	1.32
Age (IT): 65+	25.01	56.73	3.13	-31.72	-2.02
Liberal	24.07	62.93	3.14	-38.86	1.28
Moderate	34.47	46.66	2.49	-12.19	3.06
Conservative	34.42	47.45	2.65	-13.03	-5.94
Leader: Approve	29.37	52.07	3.63	-22.7	-3.53
Leader: Disapprove	34.72	42.34	4.31	-7.62	-0.03
Policy Elites	25.87	58.78	3.15	-32.91	-2.61
Financial Elites	25.44	66.78	3.69	-41.34	18.01
Military HH: Yes	43.28	38.85	2.92	4.43	4.74
Military HH: No	29.62	47.79	4.94	-18.17	-2.46

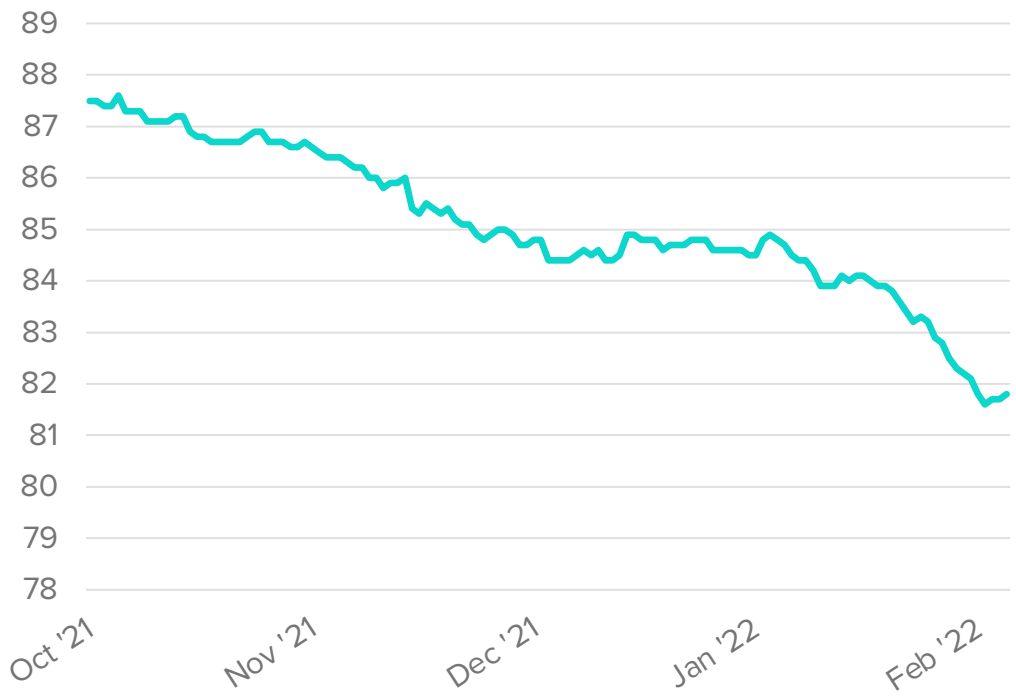
Dashed vertical line in figure indicates date one week prior. Values in table may not add up to 100% as "Heard of, No opinion" responses were not included.

RISING PRICES AND COVID-19 ALREADY WEIGHING ON CONSUMER CONFIDENCE IN ITALY, AS UKRAINE-RUSSIA CONFLICT THREATENS TO PUSH ENERGY PRICES HIGHER

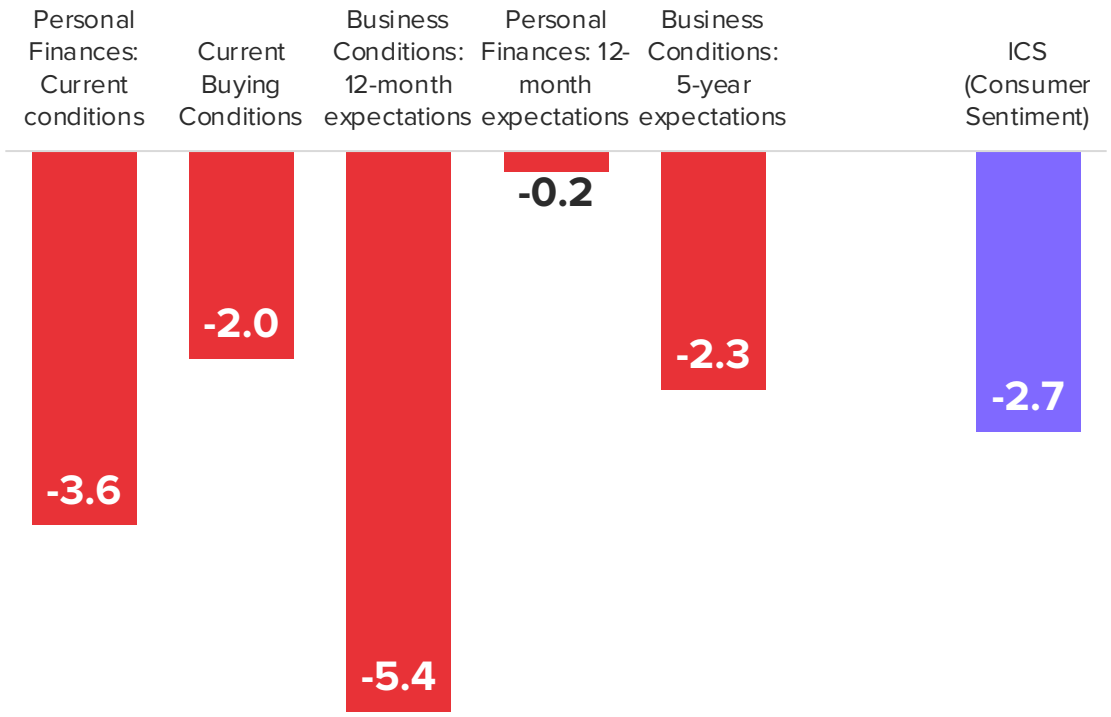
Forty-six percent of Italian gas supply comes from Russia

Morning Consult Index of Consumer Sentiment for Italy

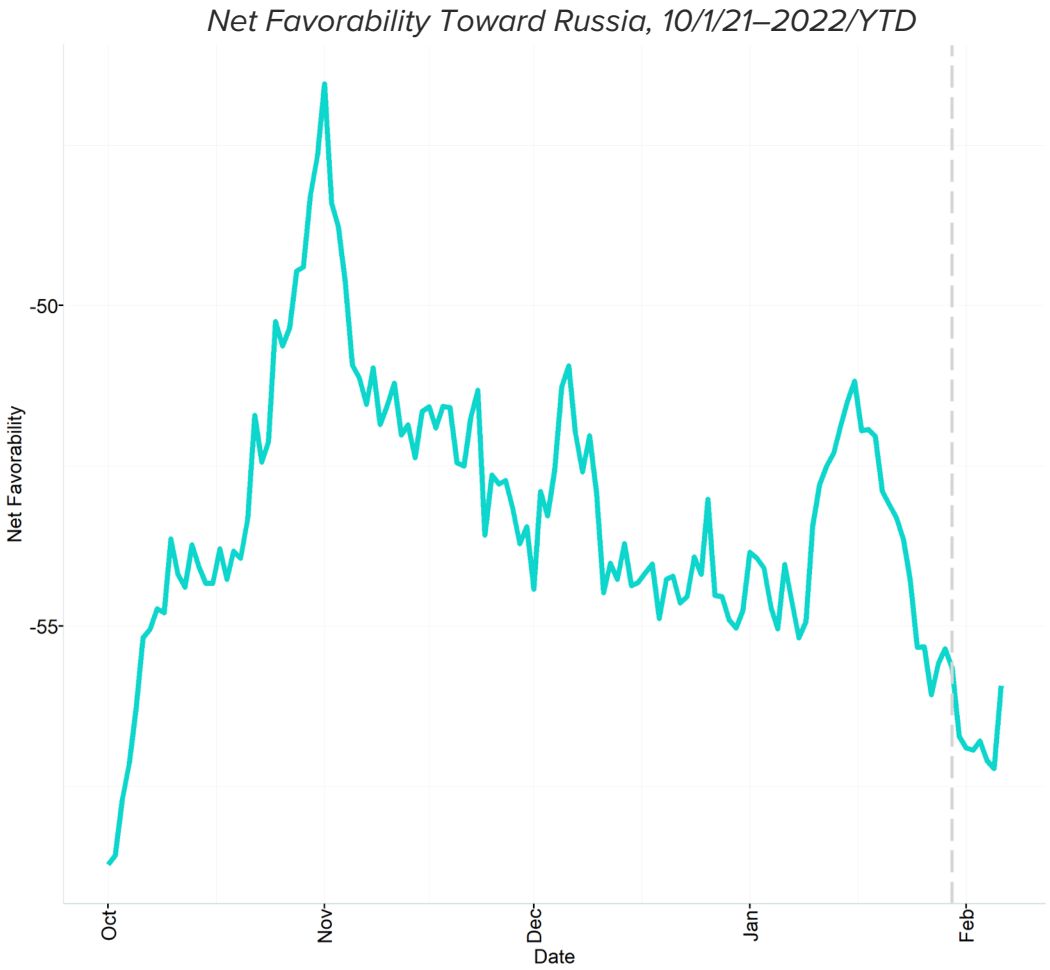
Index of Consumer Sentiment (30-Day Moving Average)



Change by Component (Jan 1 to Feb 6, 2022)



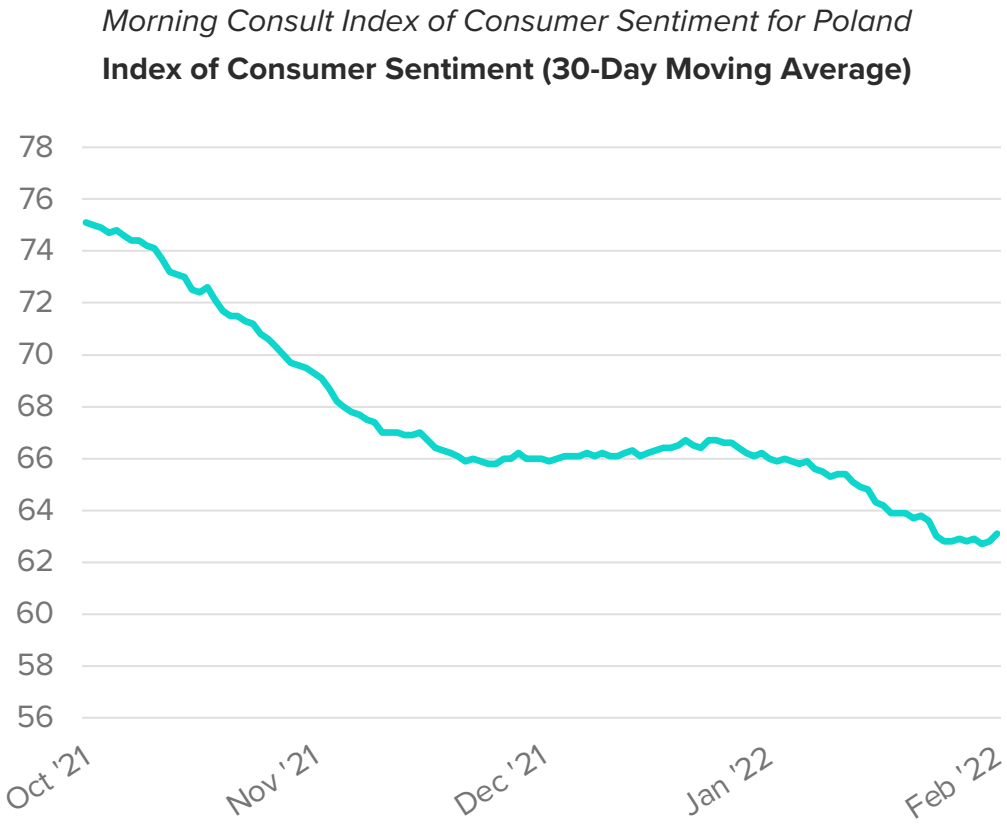
WEEKLY TRACKING: POLISH PUBLIC OPINION, FAVORABILITY TOWARD RUSSIA

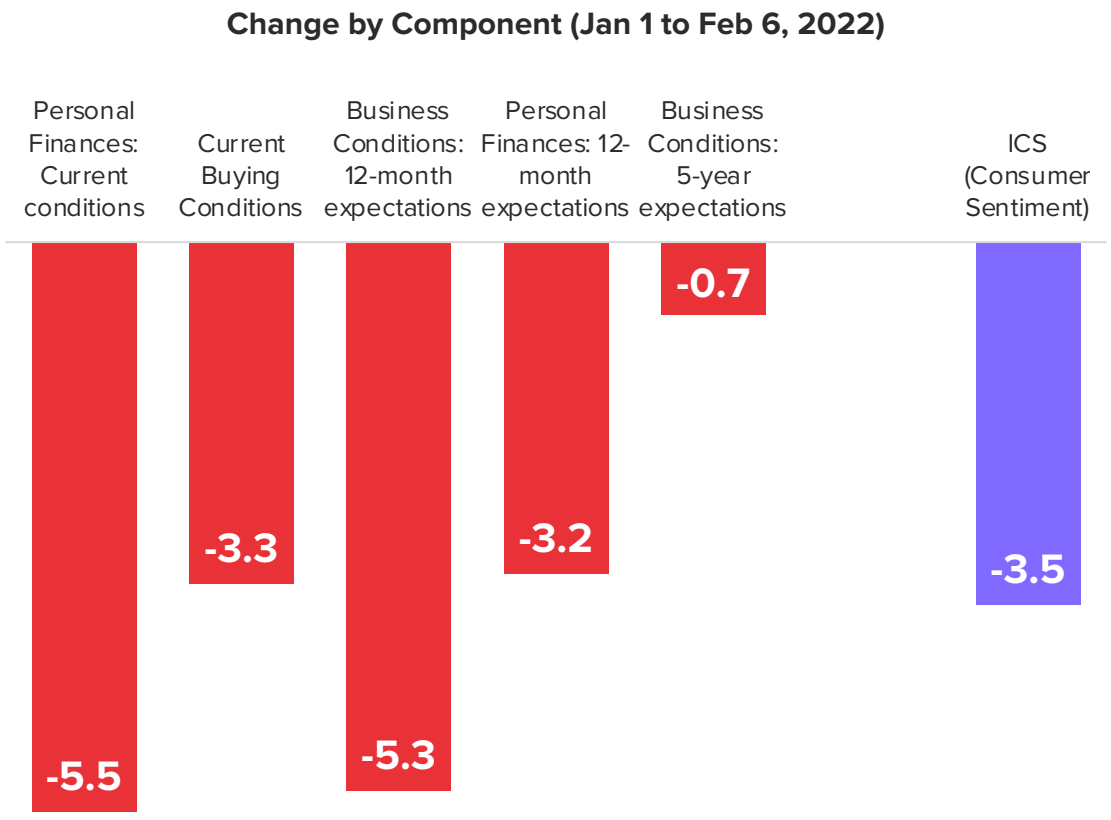


Data from 6 Feb. 2022 (30-day SMA)	Favorable	Unfavorable	DKNO	Net favorability	WoW +/- (pct points)
Adults	13.78	69.71	2.2	-55.93	-0.28
Age (PL): 18-34	16.41	59.4	3.14	-42.99	-2.35
Age (PL): 35-44	14.71	68.49	2.29	-53.78	2.63
Age (PL): 45-64	12.57	73.44	2.85	-60.87	-0.95
Age (PL): 65+	11.31	78.55	0	-67.24	0.4
Liberal	14.45	74.15	1.12	-59.7	1.29
Moderate	13.21	67.16	1.2	-53.95	-4.01
Conservative	14.2	75.88	2.18	-61.68	-1.41
Leader: Approve	14.16	69.85	1.86	-55.69	3.07
Leader: Disapprove	14.97	70.65	1.98	-55.68	0.87
Military HH: Yes	19.23	59.63	1.61	-40.4	-6.94
Military HH: No	13.53	70.16	2.22	-56.63	-0.24

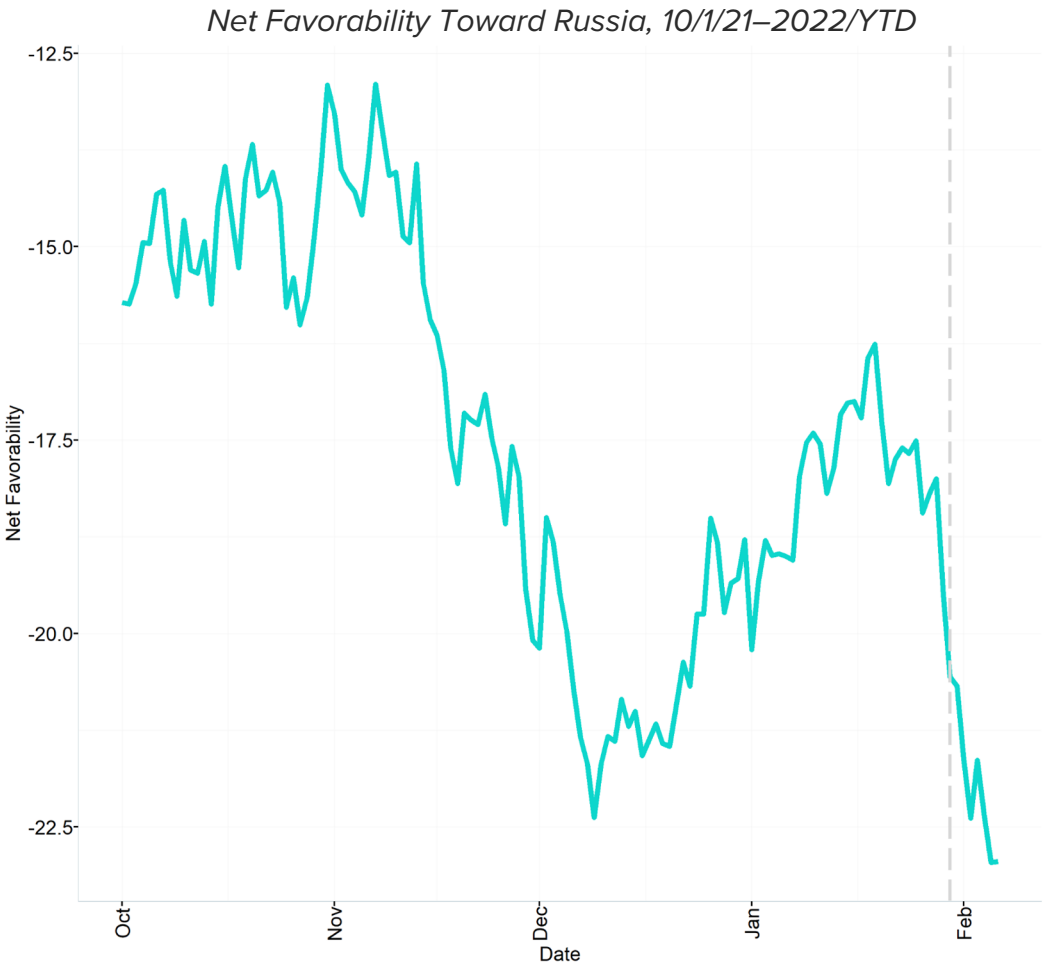
Dashed vertical line in figure indicates date one week prior. Values in table may not add up to 100% as "Heard of, No opinion" responses were not included.

POLISH CONSUMER CONFIDENCE IS FALLING FAST, REFLECTING A PANDEMIC RESURGENCE AND CONSUMER FEARS IN COUNTRIES NEAR RUSSIA OF THE KNOCK-ON EFFECTS FROM A POTENTIAL RUSSIAN INVASION OF UKRAINE





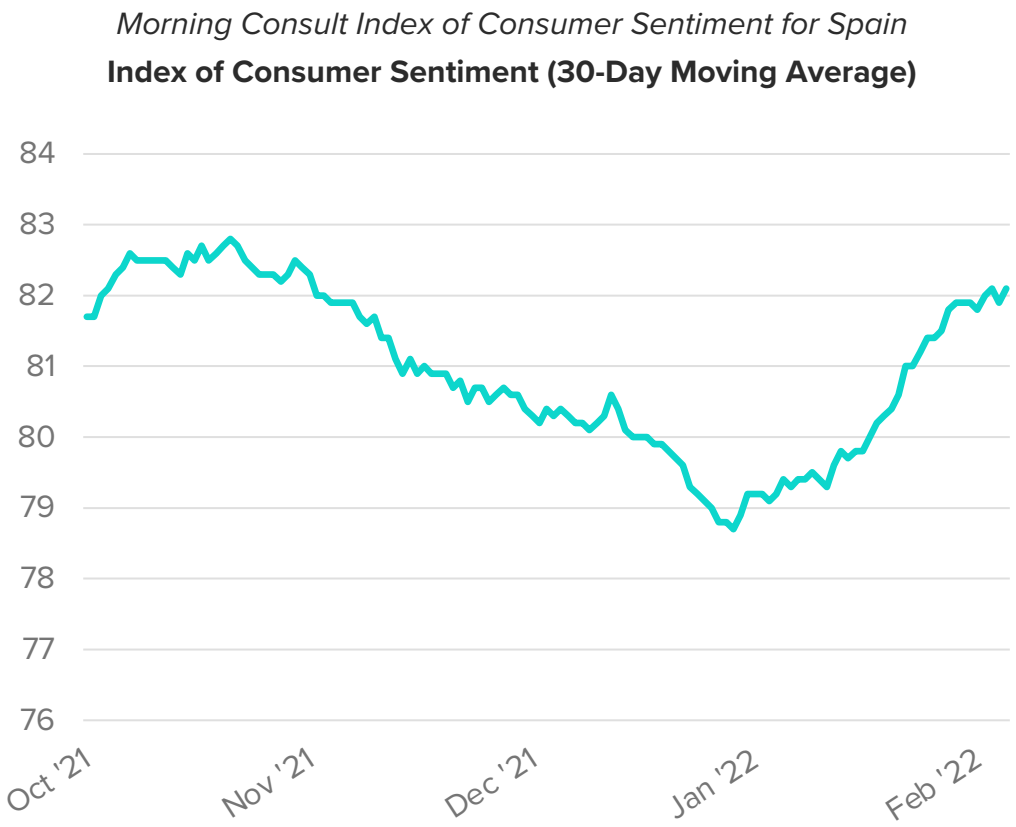
WEEKLY TRACKING: SPANISH PUBLIC OPINION, FAVORABILITY TOWARD RUSSIA

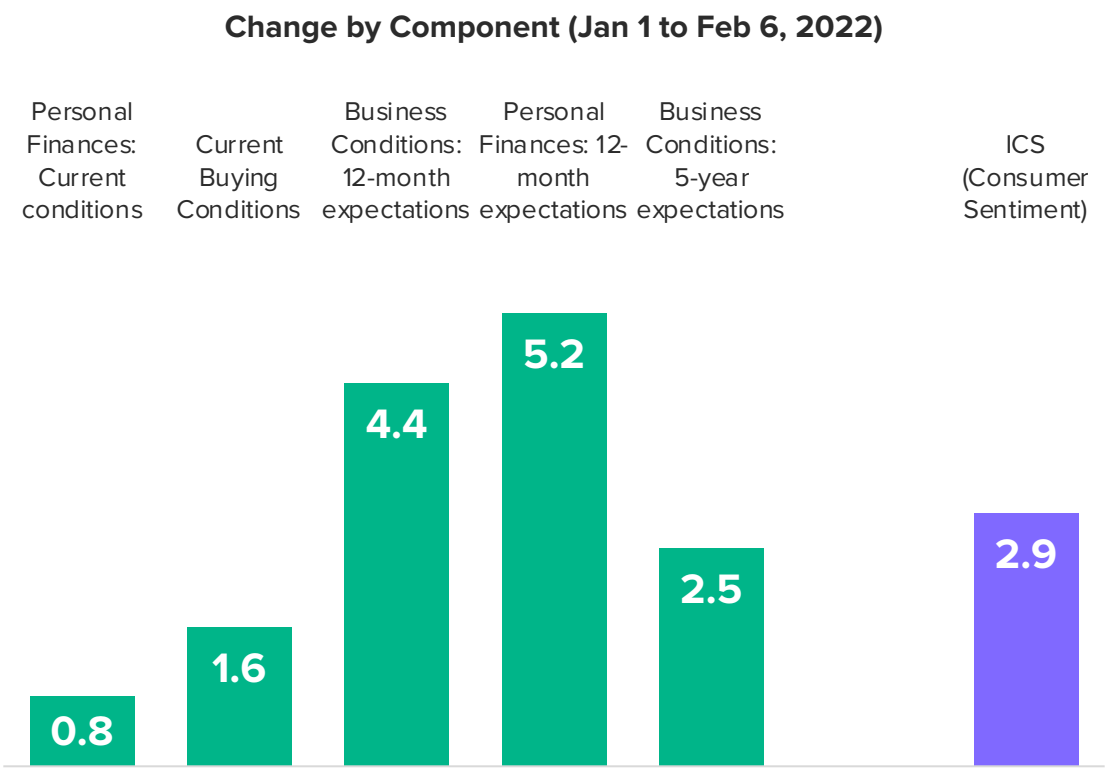


Data from 6 Feb. 2022 (30-day SMA)	Favorable	Unfavorable	DKNO	Net favorability	WoW +/- (pct points)
Adults	25.76	48.71	13.64	-22.95	-2.39
Age (ES): 18-34	34.14	38.62	13.62	-4.48	-0.32
Age (ES): 35-44	20.77	50.95	14.47	-30.18	-8.2
Age (ES): 45-64	19.17	51.48	17.44	-32.31	0.04
Age (ES): 65+	30.15	54.99	7.1	-24.84	-3.6
Liberal	28.87	54.02	8.68	-25.15	-2.22
Moderate	24.68	42.53	16.63	-17.85	-2.38
Conservative	24.92	57.04	8.54	-32.12	-3.03
Leader: Approve	30.5	49.01	10.45	-18.51	-1.67
Leader: Disapprove	22.37	51.57	14.31	-29.2	-3.65
Policy Elites	26.55	54.04	9.3	-27.49	2.29
Financial Elites	12.9	71.16	3.45	-58.26	7
Military HH: Yes	25.37	54.95	11.01	-29.58	-1.07
Military HH: No	25.84	47.46	14.16	-21.62	-2.7

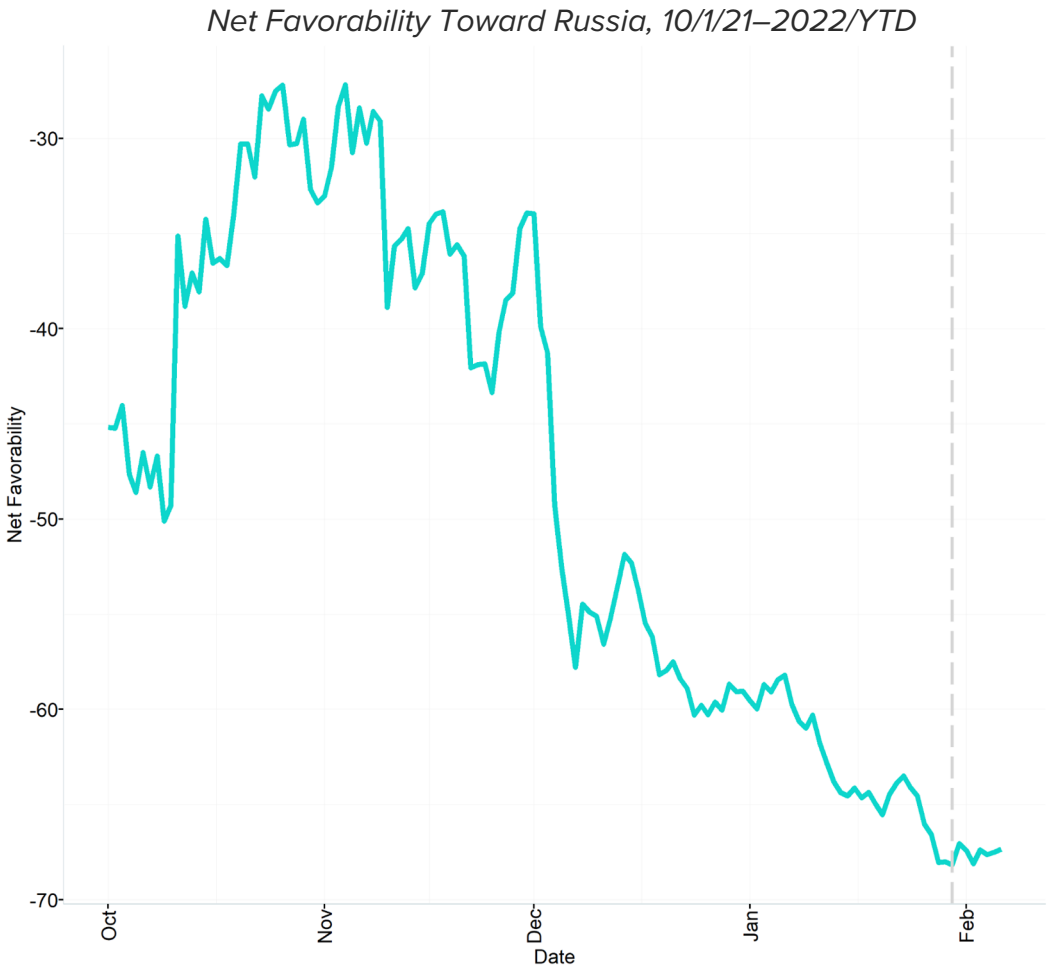
Dashed vertical line in figure indicates date one week prior. Values in table may not add up to 100% as "Heard of, No opinion" responses were not included.

SPANISH CONSUMER CONFIDENCE REBOUNDING FROM PANDEMIC LOWS AND OMICRON-DRIVEN DIP IN DECEMBER





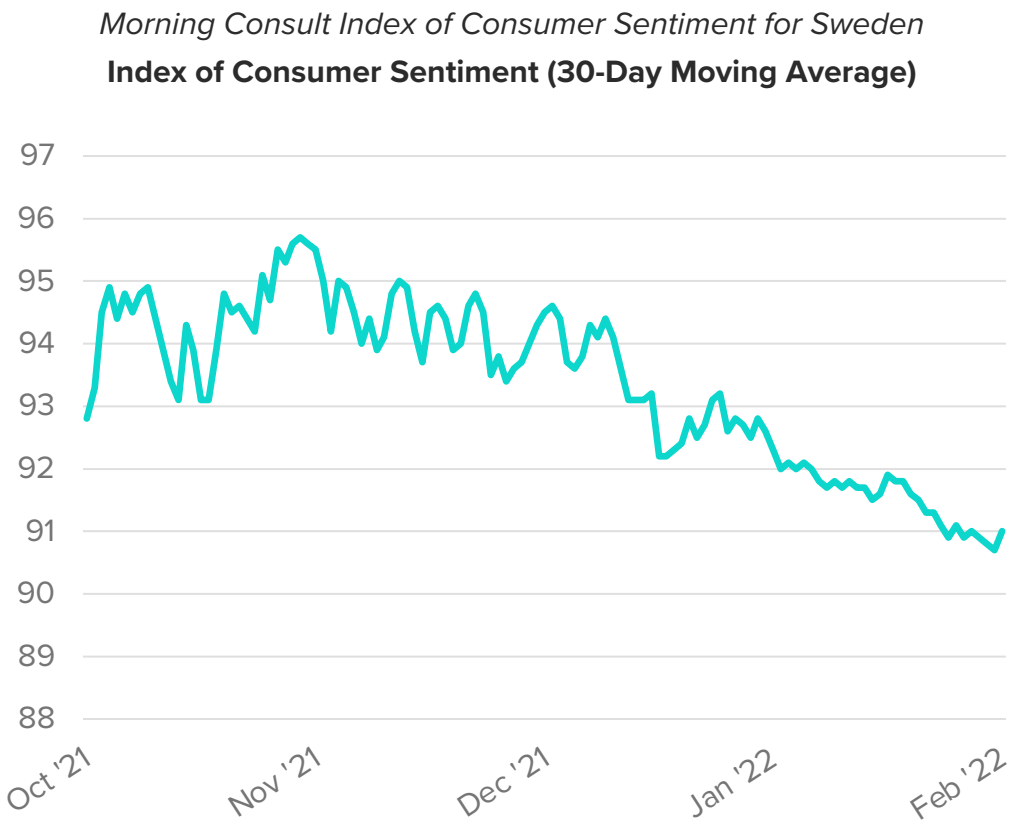
WEEKLY TRACKING: SWEDISH PUBLIC OPINION, FAVORABILITY TOWARD RUSSIA

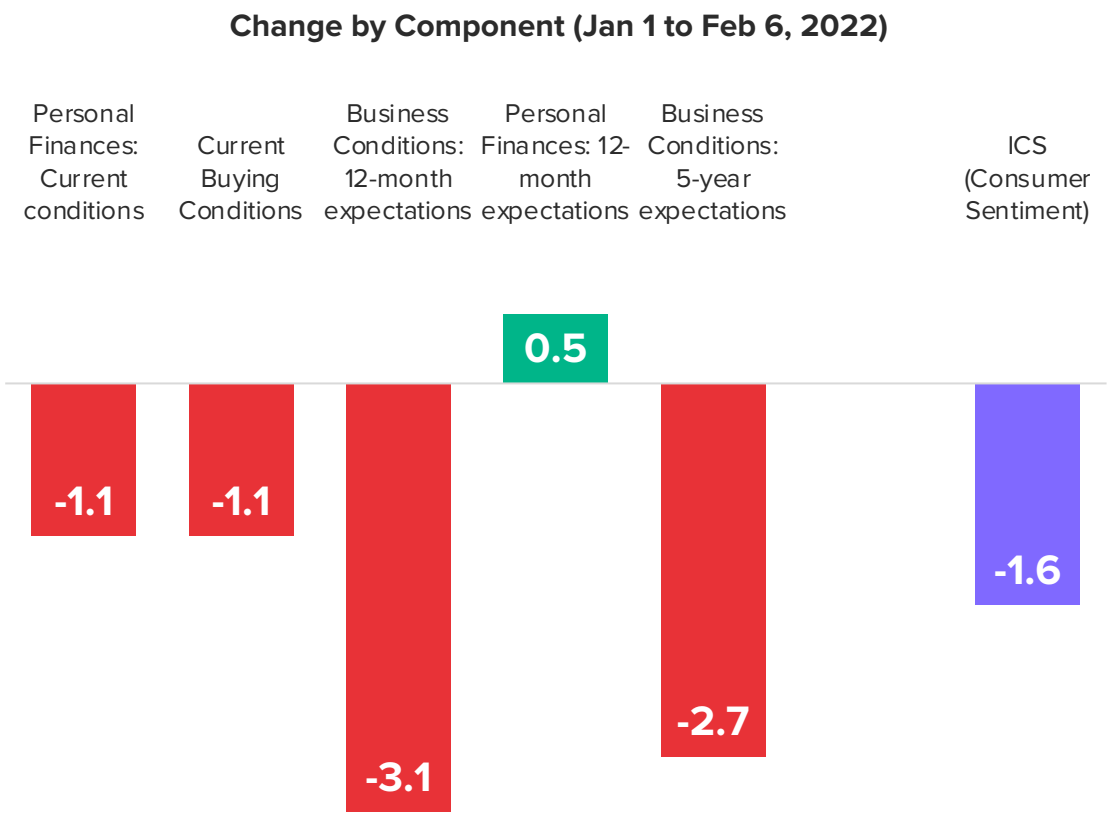


Data from 6 Feb. 2022 (30-day SMA)	Favorable	Unfavorable	DKNO	Net favorability	WoW +/- (pct points)
Adults	9.39	76.74	0.88	-67.35	0.82
Age (SE): 18-34	16.11	68.84	0.95	-52.73	0.32
Age (SE): 35-44	11.57	68.82	3	-57.25	-1.33
Age (SE): 45-64	8.53	79.74	0	-71.21	0.62
Age (SE): 65+	2.43	85.37	0.74	-82.94	3.62
Liberal	6.98	83.29	0	-76.31	1.03
Moderate	6.66	80.28	1.03	-73.62	-0.48
Conservative	11.76	78.37	1.4	-66.61	1.27
Leader: Approve	8.35	82.5	0.93	-74.15	0.77
Leader: Disapprove	13.79	72.09	0.17	-58.3	3.17
Military HH: Yes	12.97	87.03	0	-74.06	13.08
Military HH: No	9.22	76.25	0.92	-67.03	0.3

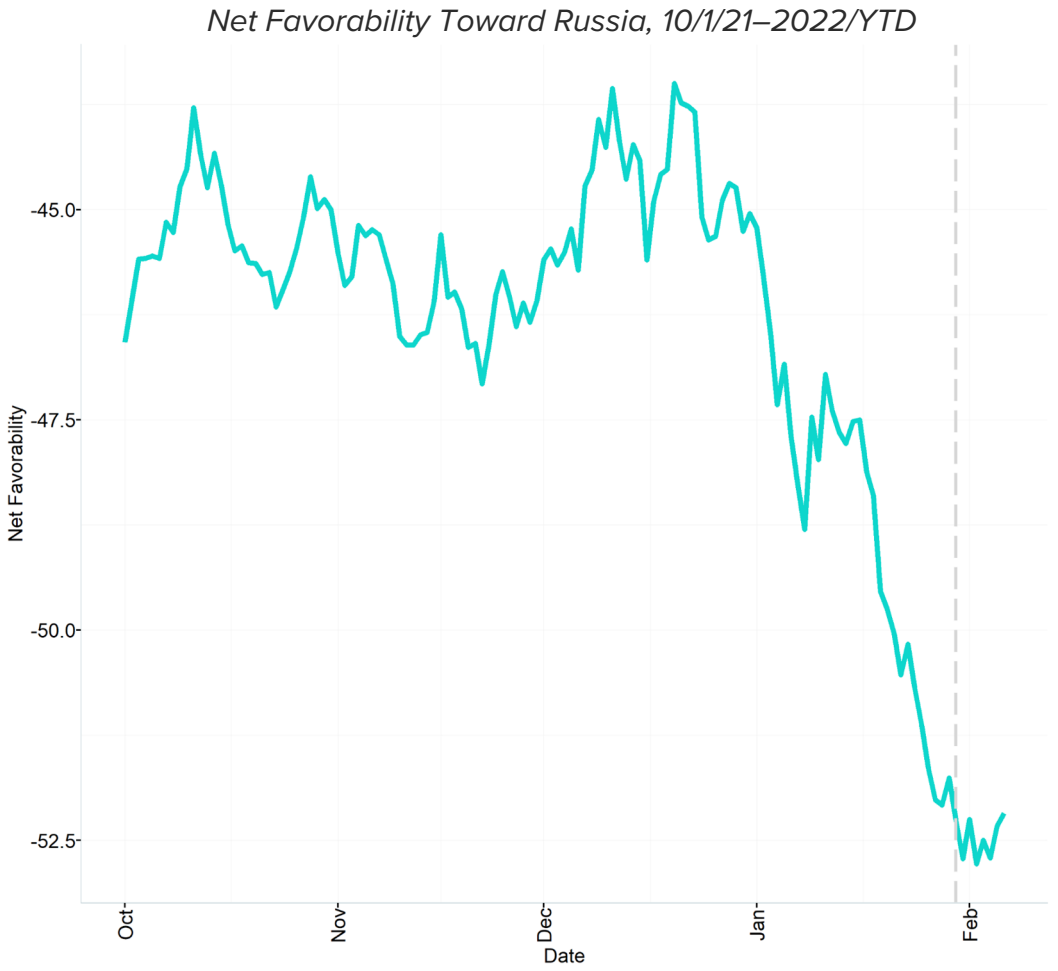
Dashed vertical line in figure indicates date one week prior. Values in table may not add up to 100% as "Heard of, No opinion" responses were not included.

SWEDISH CONSUMER CONFIDENCE BEING ERODED BY COVID-19 RESURGENCE AND RISING PRICES, ESPECIALLY ELECTRICITY





WEEKLY TRACKING: U.K. PUBLIC OPINION, FAVORABILITY TOWARD RUSSIA



Data from 6 Feb. 2022 (30-day SMA)	Favorable	Unfavorable	DKNO	Net favorability	WoW +/- (pct points)
Adults	11.98	64.16	0.55	-52.18	0.07
Age (UK): 18-34	23.06	50.88	0.75	-27.82	1.8
Age (UK): 35-44	12.78	60.32	0.67	-47.54	-1.02
Age (UK): 45-64	7.77	66.92	0.23	-59.15	-0.46
Age (UK): 65+	3.64	79.29	0.69	-75.65	-1.89
Liberal	14.4	70.38	0.38	-55.98	-3.17
Moderate	10.05	61.61	0.67	-51.56	0.13
Conservative	16.19	75.28	0.18	-59.09	5.06
Leader: Approve	14.86	66.47	0.64	-51.61	-1.42
Leader: Disapprove	10.61	65.5	0.46	-54.89	1.07
Policy Elites	13.33	72.84	0.65	-59.51	4.05
Financial Elites	22.74	74.04	0.72	-51.3	8.99
Military HH: Yes	25.68	69.27	0	-43.59	-0.75
Military HH: No	11.18	63.86	0.59	-52.68	0.14

Dashed vertical line in figure indicates date one week prior. Values in table may not add up to 100% as "Heard of, No opinion" responses were not included.

U.K. CONSUMER SENTIMENT HAS WEAKENED CONSIDERABLY SINCE JULY AS UNCERTAINTY AND RISING PRICES HAVE UNDERMINED CONFIDENCE

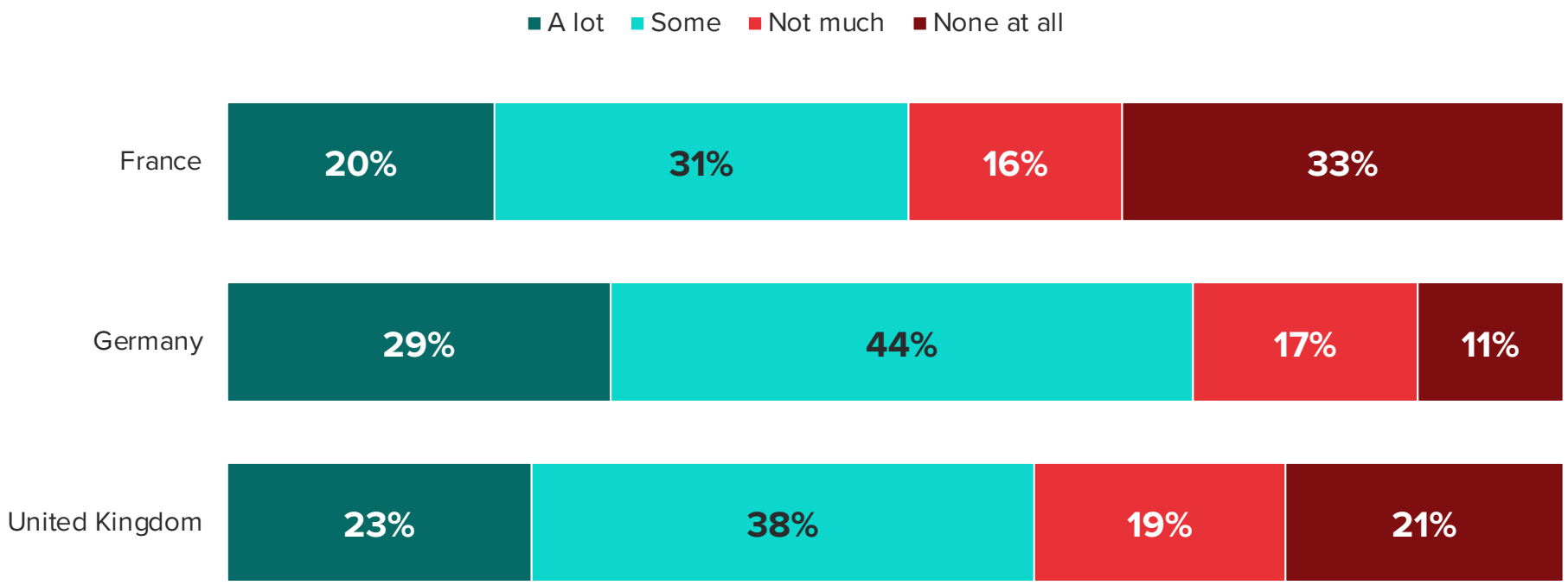
Morning Consult Index of Consumer Sentiment for the U.K.

Index of Consumer Sentiment (30-Day Moving Average)

Change by Component (Jan 1 to Feb 6, 2022)

MOST RESPONDENTS IN MAJOR EUROPEAN COUNTRIES HAVE HEARD AT LEAST SOMETHING ABOUT A POTENTIAL RUSSIAN INVASION OF UKRAINE

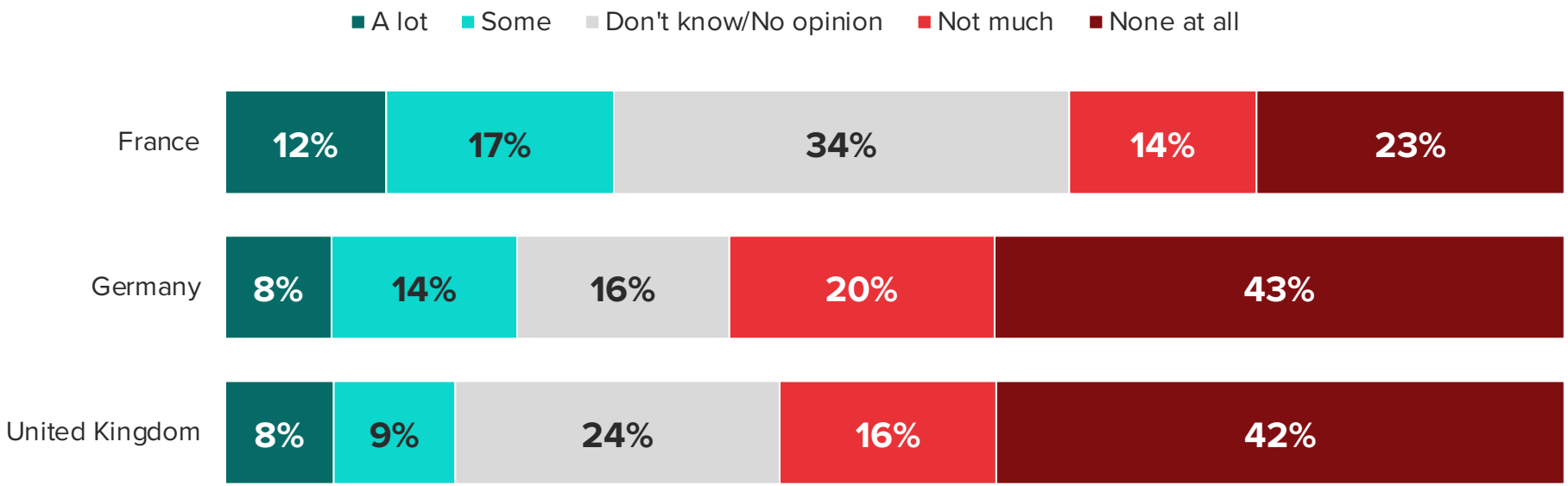
Respondents were asked how much they have seen, read, or heard about Russia's preparing for a potential invasion of Ukraine



Poll conducted Jan. 20-21, 2022, among a representative sample of 1,000 adults per country, with unweighted margins of error of +/-3 percentage points. Figures may not add up to 100% due to rounding.

GERMAN AND U.K. ADULTS OPPOSE GREATER RUSSIAN INFLUENCE IN NEIGHBORING COUNTRIES, BUT THE FRENCH ARE LESS CERTAIN

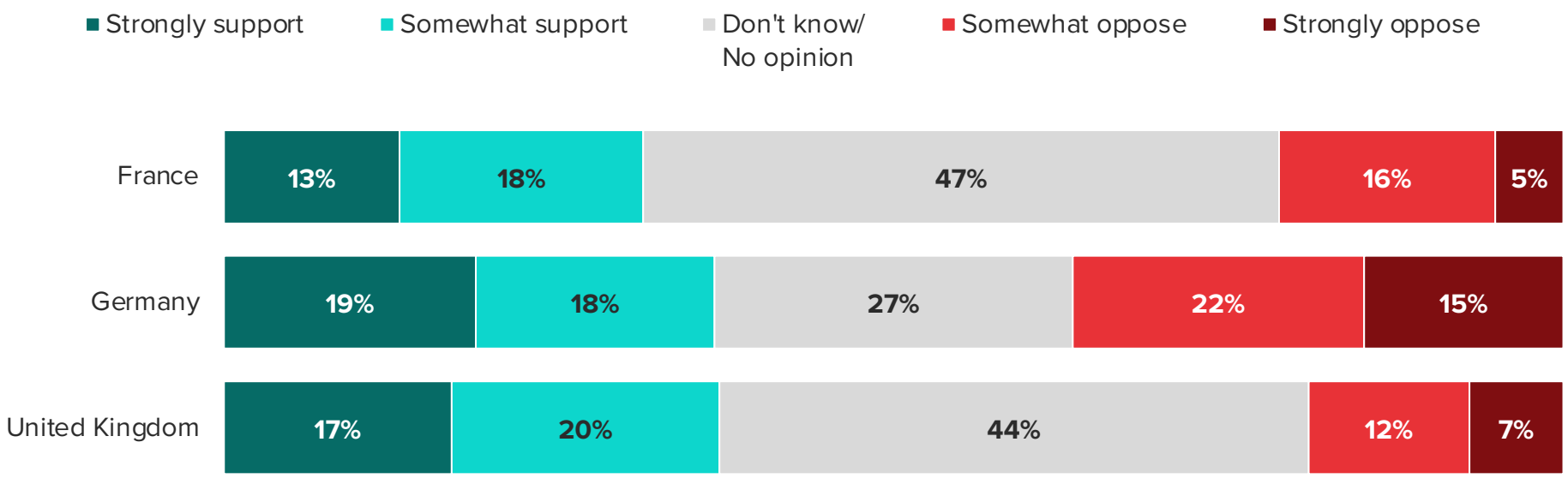
Respondents were asked how much influence they think Russia should have in neighboring countries like Georgia, Kazakhstan, and Ukraine



Poll conducted Jan. 20-21, 2022, among a representative sample of 1,000 adults per country, with unweighted margins of error of +/-3 percentage points. Figures may not add up to 100% due to rounding.

RESPONDENTS IN MAJOR EUROPEAN COUNTRIES ARE SPLIT ON THEIR SUPPORT FOR CANCELING NORD STREAM 2

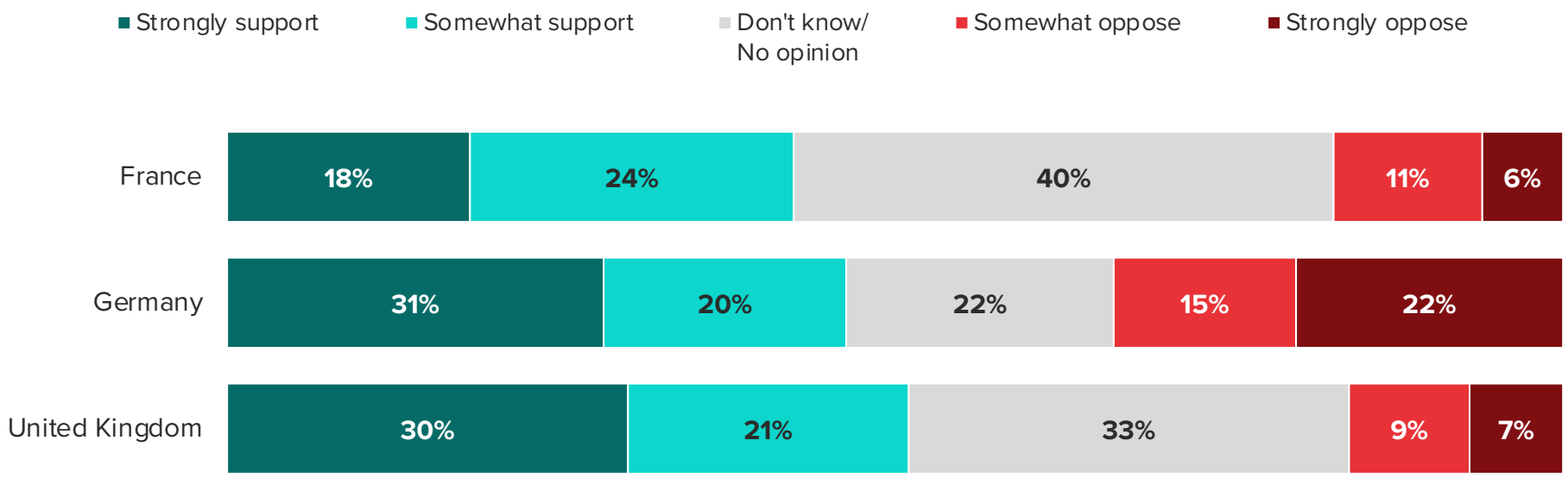
Respondents were asked if they support Germany's canceling the Nord Stream 2 gas pipeline if Russia invades Ukraine



Poll conducted Jan. 20-21, 2022, among a representative sample of 1,000 adults per country, with unweighted margins of error of +/-3 percentage points. Figures may not add up to 100% due to rounding.

THE BULK OF RESPONDENTS IN MAJOR EUROPEAN COUNTRIES BACK SANCTIONS ON RUSSIA, BUT MANY REMAIN UNCERTAIN

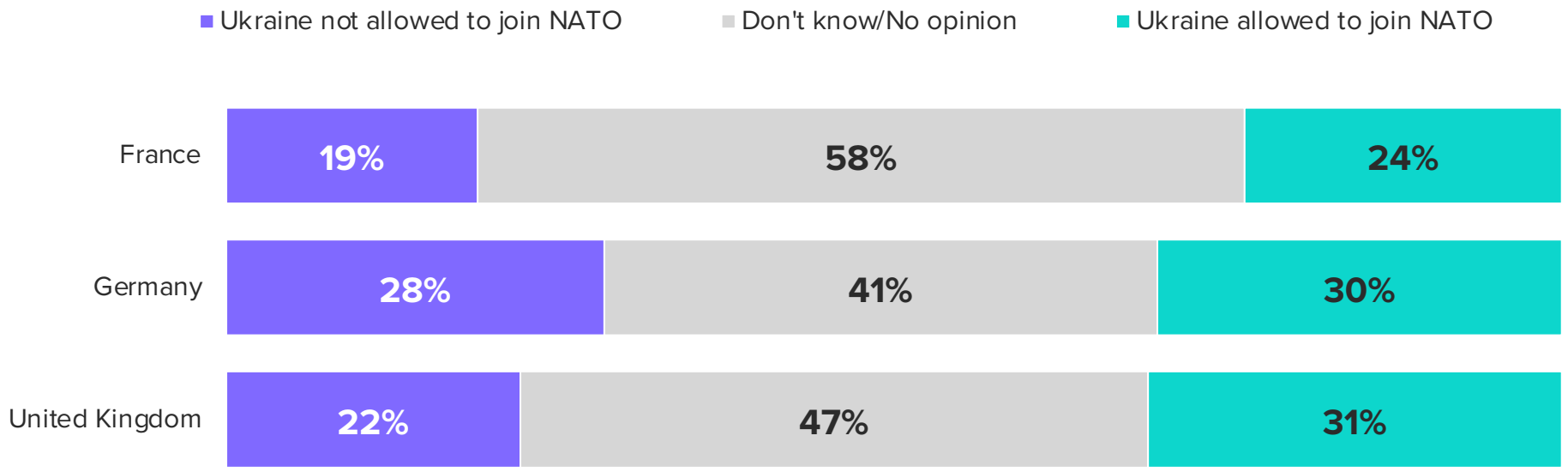
Respondents were asked if they support action from the West (including Europe, North America and Australia) to impose sanctions on Russia if it invades Ukraine



Poll conducted Jan. 20-21, 2022, among a representative sample of 1,000 adults per country, with unweighted margins of error of +/-3 percentage points. Figures may not add up to 100% due to rounding.

AT LEAST 2 IN 5 RESPONDENTS IN FRANCE, GERMANY AND THE U.K. ARE UNSURE WHETHER NATO SHOULD PROHIBIT UKRAINE MEMBERSHIP IN ORDER TO PREVENT A RUSSIA INVASION

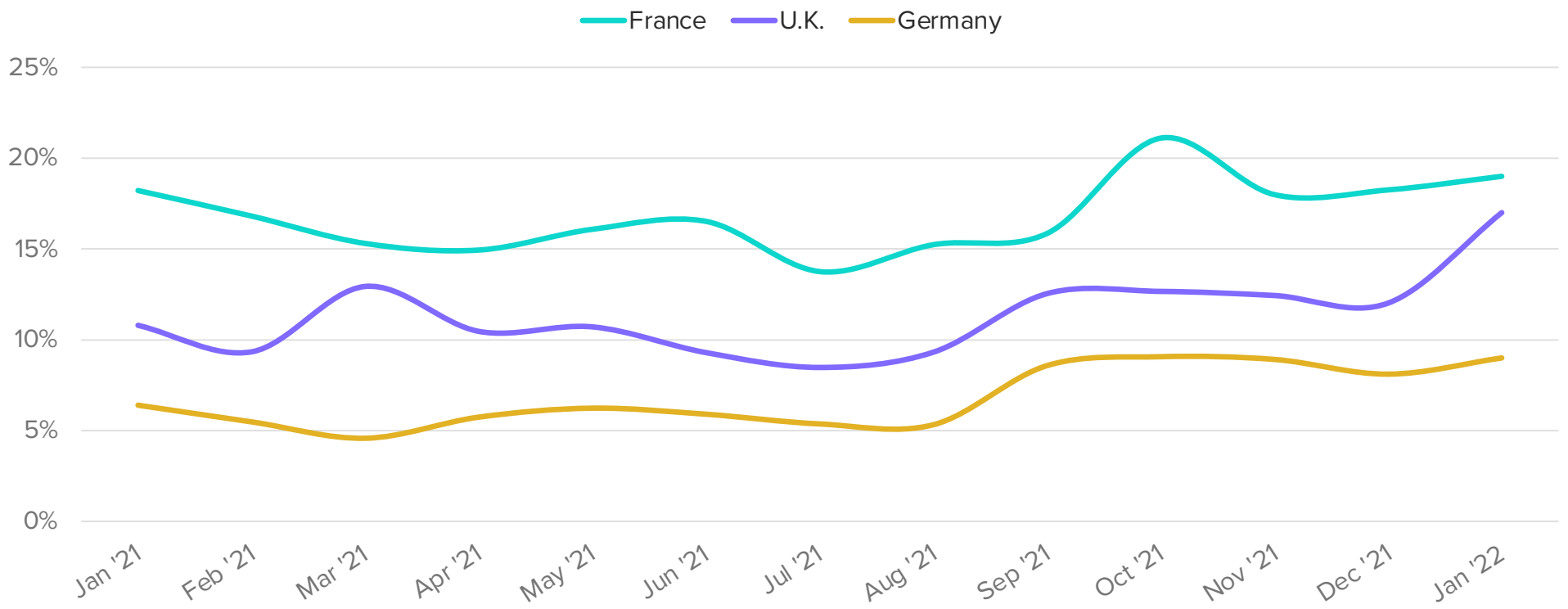
Respondents were asked if they think NATO should not allow Ukraine to join the organization in order to prevent Russia from invading Ukraine



Poll conducted Jan. 20-21, 2022, among a representative sample of 1,000 adults per country, with unweighted margins of error of +/-3 percentage points. Figures may not add up to 100% due to rounding.

RESPONDENTS IN MAJOR EUROPEAN COUNTRIES REPORT A NET INCREASE IN CONCERN OVER RISING ENERGY BILLS. CONCERN HAS REMAINED ELEVATED IN RECENT MONTHS

Figure reports the share of adults in France, Germany, and the U.K. who say they are “not confident” they can pay their water, gas, or electric bill each month



SECTION 3

THE VIEW FROM RUSSIA

Tracking Global Opinion on the Russia-Ukraine Crisis

THE VIEW FROM RUSSIA

Key metrics of Russian sentiment suggest that Russians are relatively unfazed by the threat of sanctions and war with Ukraine. Russians continue to think their country is moving in the right direction on net, per Morning Consult's Country Trajectory data. Consumer confidence has similarly remained relatively flat, per Morning Consult's Index of Consumer Sentiment for Russia.

Slow and Steady

Despite the risk of sanctions and a potentially costly war over Ukraine, Russians continue to indicate their country is moving in the right direction on net. Russians country trajectory sentiment has also remained relatively flat over 2020/YTD, showing no imminent signs of a shift into more negative territory.

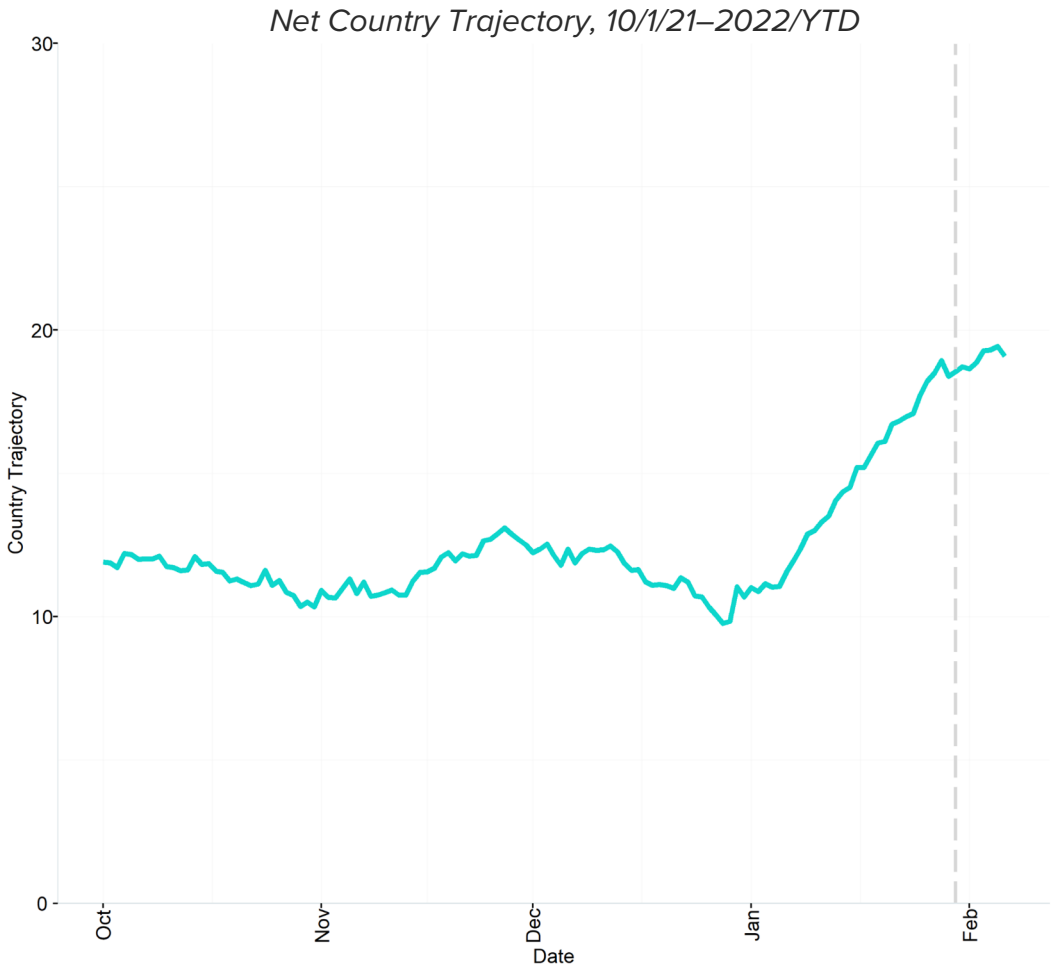
Consumers Unfazed by Sanctions

Russian consumer confidence has remained relatively flat in recent weeks (increasing slightly on net since late 2021), suggesting consumers are unfazed by the threat of sanctions per Morning Consult's Index of Consumer Sentiment for Russia. Volatility over 2022/YTD similarly remains lower than in 2020 and 1H/2021.

Regional Knock-On Effects Possible

While Russian consumer confidence is relatively steady, Polish consumer confidence is falling fast, suggesting consumers in nearby countries anticipate economic knock-on effects from a potential Russian invasion of Ukraine.

WEEKLY TRACKING: RUSSIAN PUBLIC OPINION, COUNTRY TRAJECTORY

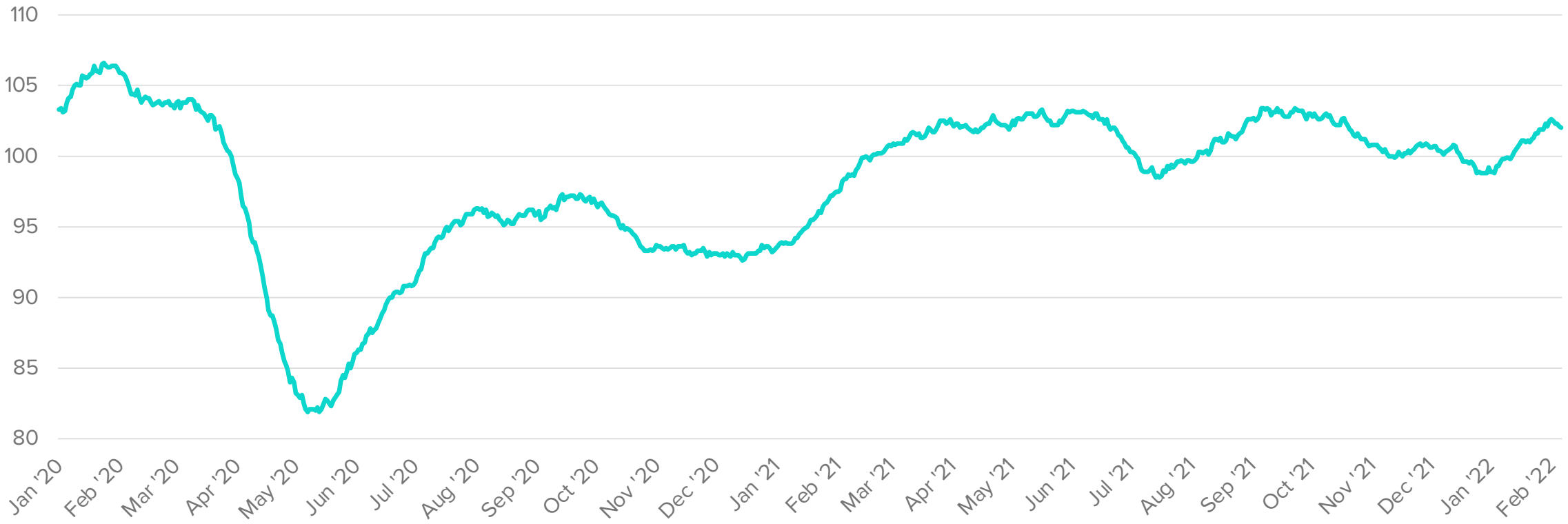


Data from 6 Feb. 2022 (30-day SMA)	Right direction	Wrong track	Net right/wrong	WoW +/- (pct points)
Adults	59.54	40.46	19.09	0.54
Age (RU): 18-34	56.49	43.51	12.97	-0.96
Age (RU): 35-44	60.77	39.23	21.55	2.3
Age (RU): 45-64	56.81	43.19	13.62	0.85
Age (RU): 65+	71.53	28.47	43.05	1.57
Liberal	44.35	55.65	-11.3	-2.61
Moderate	65.67	34.33	31.33	1.31
Conservative	68.34	31.66	36.67	0.46
Policy Elites	62.16	37.84	24.32	-2.01
Financial Elites	67.02	32.98	34.04	5.78

Dashed vertical line in figure indicates date one week prior.

RUSSIAN CONSUMER CONFIDENCE HAS REMAINED RELATIVELY FLAT IN RECENT WEEKS, SUGGESTING RUSSIAN CONSUMERS ARE UNFAZED BY THE THREAT OF SANCTIONS

Morning Consult Index of Consumer Sentiment for Russia (30-day moving average)



Dashed vertical line in figure indicates date one week prior.

SECTION 4

APPENDIX & METHODOLOGY

Tracking Global Opinion on the Russia-Ukraine Crisis

METHODOLOGY

Sampling and Data Collection

Morning Consult conducts interviews with more than 30,000 adults per day across 44 countries. In the United States, more than 6,000 daily interviews are conducted. The interviews are conducted online through multiple nationally recognized vendors. Morning Consult uses a stratified sampling process based on age and gender to reach a broad, nationally representative audience in each country. The interview collection period for all 44 countries begins at 4 a.m. ET and closes at 3 a.m. ET the following day. The date of publication reflects the date when the survey closes.

Weighting and Representativeness

All national data are weighted to match a target population on the key dimensions of age, gender, education, region, as well as race and ethnicity in some markets. The target population is generally the adult (18+) population except in India (where the target is the literate population), and China, Egypt and Nigeria (where the target is the internet using population).

Daily Tracking Metrics

The country favorability data in this report is based on a 30-day moving average of daily estimates.

Country Favorability Data Series: Temporal Coverage and Figures

The Morning Consult country favorability data employed in this report runs from 1 October 2021 through 6 Feb. 2022. Figures report a 30-day simple moving average of the indicated response share among adults; the corresponding tables indicate response shares among various other demographics based on a 30-day simple moving average as of 6 Feb. 2022. Sample sizes vary across countries and demographics.

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Jason McMann is Head of Geopolitical Risk Analysis for Morning Consult, leveraging the company's high-frequency intelligence with analysis to advise companies and governments on how politics and regional developments impact strategy and operational management.

Prior to joining Morning Consult, Jason served as Head of Analytics at GeoQuant, where he led efforts to systematically model the impact of political risk on markets as well as the analysis of global trade and investment policy risks; he also led country risk analysis for South and Southeast Asia.

Jason has worked with a range of nonprofit and development organizations on regulatory benchmarking projects in emerging markets, including the World Bank, the International Finance Corporation, and the Natural Resource Governance Institute. Jason earned his PhD from Princeton University's Politics Department with a specialization in International Political Economy. He holds a M.A. in International Relations from the University of Chicago and a B.A. from New York University.

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