



2021

Transatlantic Trends

Transatlantic opinion on
global challenges

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METHODOLOGY

The fieldwork was conducted online between March 29 and April 13, 2021 in 11 countries: Canada, France, Germany, Italy, the Netherlands, Poland, Spain, Sweden, Turkey, the United Kingdom, and the United States.

In each of the 11 countries surveyed, the sample consisted of 1,000 persons aged 18 and above.

The data was collected through online access panels with self-completion, and then weighted to match population totals for the following factors:

- age, gender (in all countries)
- region (in all countries, according to local standards)
- income (in Canada, the United States, Germany, Italy, Poland, and Spain)
- occupation (only in the UK and France)

Numbers are rounded to the nearest digit. The 2021 survey follows the 2020 edition, where fieldwork was undertaken in January (before the outbreak of the coronavirus pandemic) and in May (after the outbreak of the pandemic).

The study was conducted by Kantar Public.

TRANSATLANTIC TRENDS 2021

FOREWORD

2021 opens a new chapter for the transatlantic relationship. The change of the U.S. administration as well as the political, economic, and societal implications of the coronavirus pandemic have redefined transatlantic policy dialogues. New priorities have emerged, as the calls for increased cooperation around climate change and common values signal an opportunity for an update of the transatlantic agenda.

In parallel, transatlantic partners face a series of structural challenges: The articulation of cooperation and competition with China, ongoing security crises in the European neighborhoods and the Indo-Pacific, and the risk of democratic backsliding require more cohesion on both sides of the Atlantic. These issues also reveal the different national perceptions of the global strategic environment, and could lead to divergent policy choices.

The transatlantic community can play an essential role in meeting the challenges of today and tomorrow, but for us to work in common purpose, we need to understand how those challenges look to our respective societies. That insight—the need to anchor this cooperation in the perceptions and desires of the population—is at the core of the Transatlantic Trends project.

Transatlantic Trends 2021 includes the results of surveys conducted in 11 countries representing all corners of the transatlantic community: Canada, France, Germany, Italy,

the Netherlands, Poland, Spain, Sweden, Turkey, the United Kingdom, and the United States. The original data provided by this report is meant to be a helpful tool for policymakers, business leaders, experts, academia, and the media. It also aims at fostering relevant debates, strengthening mutual understanding, and building a positive agenda for transatlantic cooperation.

This research is not just transatlantic in focus—it is a true transatlantic collaboration between several U.S. and European organizations and institutions. The findings in the pages that follow benefit in intellectual richness from the diversity of perspectives that informed everything from framing the questions to interpreting the resulting data.

Divided into five chapters, Transatlantic Trends provides a detailed picture of transatlantic public opinion on core and contemporary issues: the transatlantic relationship; international security and defense; trade, economic, and technology policies; relations with China; and global challenges.

We are confident that these findings will advance the transatlantic conversation and meaningfully contribute to mutual understanding. As a community of shared values, the transatlantic alliance will be able to meet the challenges of 2021 and beyond by building on the priorities and interests expressed by its people.

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Summary of key findings

The United States remains dominant, but has not recovered from the pandemic drop.

One-third to half of Europeans do not think the United States is the most influential global leader.

Germany is seen as the most influential country in Europe (60%),

ranked significantly above the UK (19%) and France (7%).

Canada enjoys the highest level of trust among all countries, Turkey the lowest.

Less than a quarter find Turkey to be a dependable partner.

China's influence holds steady, seen as second most important global power

at 20%, with the EU following at 14% on average.

The EU's global influence is judged highest in the UK,

and is seen as comparatively influential in Germany, Sweden, and Poland, but its influence is perceived as marginal by Americans.

Climate change and global health are the top issues for transatlantic cooperation,

followed by the fight against terrorism and by trade.

The state of democracy is overall perceived as good,

except for majorities in Turkey, Poland, and Italy.

In Turkey, Poland, and Italy 27-39% of respondents think their democracy is in danger.

NATO is perceived as important for national security on both sides of the Atlantic,

especially in Poland, the UK, and the United States.

A majority of Europeans are in favor of U.S. engagement in the security and defense of Europe,

with the Turks, the Swedes, and the French being the most skeptical.

Respondents in eight of eleven countries show war fatigue in the Middle East.

There is a clear transatlantic consensus for a tougher approach toward China,

especially on human rights, cybersecurity, and climate change.

18-24 year-olds have a much more positive image of China than other age cohorts,

and are more likely to see China as a partner, especially in the U.S., France, Germany, and the UK.

International trade is perceived as beneficial,

and there is strong support for closer economic cooperation with the United States.

There is a consensus that governments must do much more to tackle climate change,

and support for more action is particularly high in Turkey, Italy, Spain, and Poland.

A majority want more restrictive policies on migration,

but respondents disagree on whether migration is positive or negative.

The French are most concerned about terrorism and extremism,

whereas respondents in other countries see pandemics and climate change as the most important security challenges.

Swedes and Britons are most tech-confident, Germans and Italians most tech-worried,

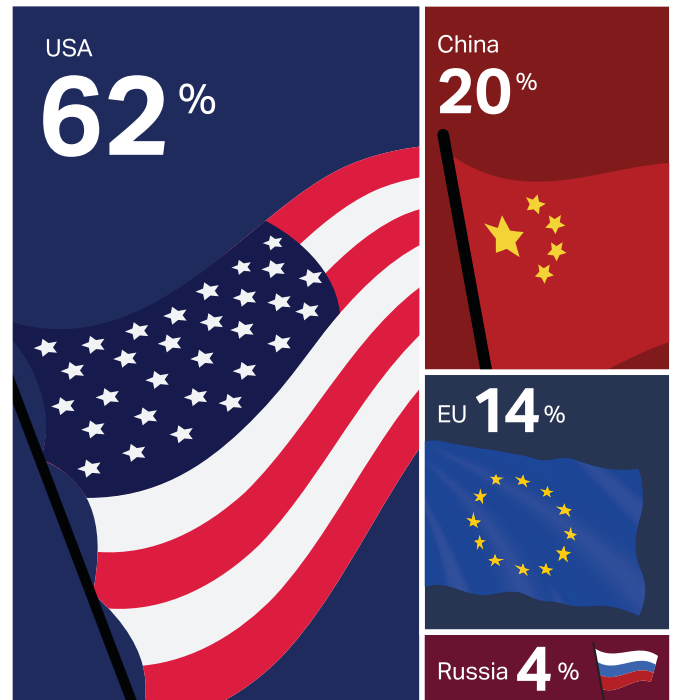
and in nine out of 11 countries a plurality think their country is at least somewhat keeping pace.



Transatlantic Relations

WHICH POWER IS THE MOST INFLUENTIAL GLOBALLY?

While the U.S. is clearly seen as most influential, its standing has not recovered from early in the pandemic. One-third to half of Europeans no longer think the U.S. is the leading global power.



The strongest perceptions of American influence abroad are in the United States (81%, an increase by 5 points from 2020), Canada (68%), and Spain (65%), the highest level in Europe. Roughly three out of five respondents in Turkey (63%), Sweden (63%), Poland (62%), and the UK (58%) see the U.S. as the most influential player, whereas this is only the case for just over half of the French (56%), Germans (55%), and Italians (51%). The first three months of the Biden administration have not affected French and German views of U.S. influence in the world, as these numbers are in line with the post-pandemic results of the 2020 survey (55% for France and 54% for Germany), which had fallen by about 10 points from the pre-pandemic numbers, to the advantage of China.

China consolidates its standing as the second most influential global power in the eyes of the Germans (22%, +2 points compared to 2020, post-coronavirus survey) and French (28%, no change compared to 2020, post-coronavirus), holding on to its post-pandemic bump. Alongside the French, the Dutch (27%) and the Italians (32%) are most likely to rank China as the most influential global player, in contrast to the relatively few Swedes (14%), Poles (15%), and Britons (15%) who see China as the leading power. Despite increasing Chinese engagement on the

international stage, Europeans and North Americans do not believe China's influence compares to the United States'.

Transatlantic partners see only modest influence for the EU and almost no global role for Russia. Respondents in the UK (22%), Sweden (19%), and Germany (18%) are most likely to choose the EU as the most influential player in global affairs, compared to only 12% of the respondents in the Netherlands, Spain, and Italy. While the French perception of the EU's global influence has barely changed compared to the post-pandemic results in 2020 (-1 point from 15% in 2020), German respondents were slightly less likely to perceive the EU as the most influential actor than one year ago (18% compared to 21% in the 2020 post-coronavirus survey).

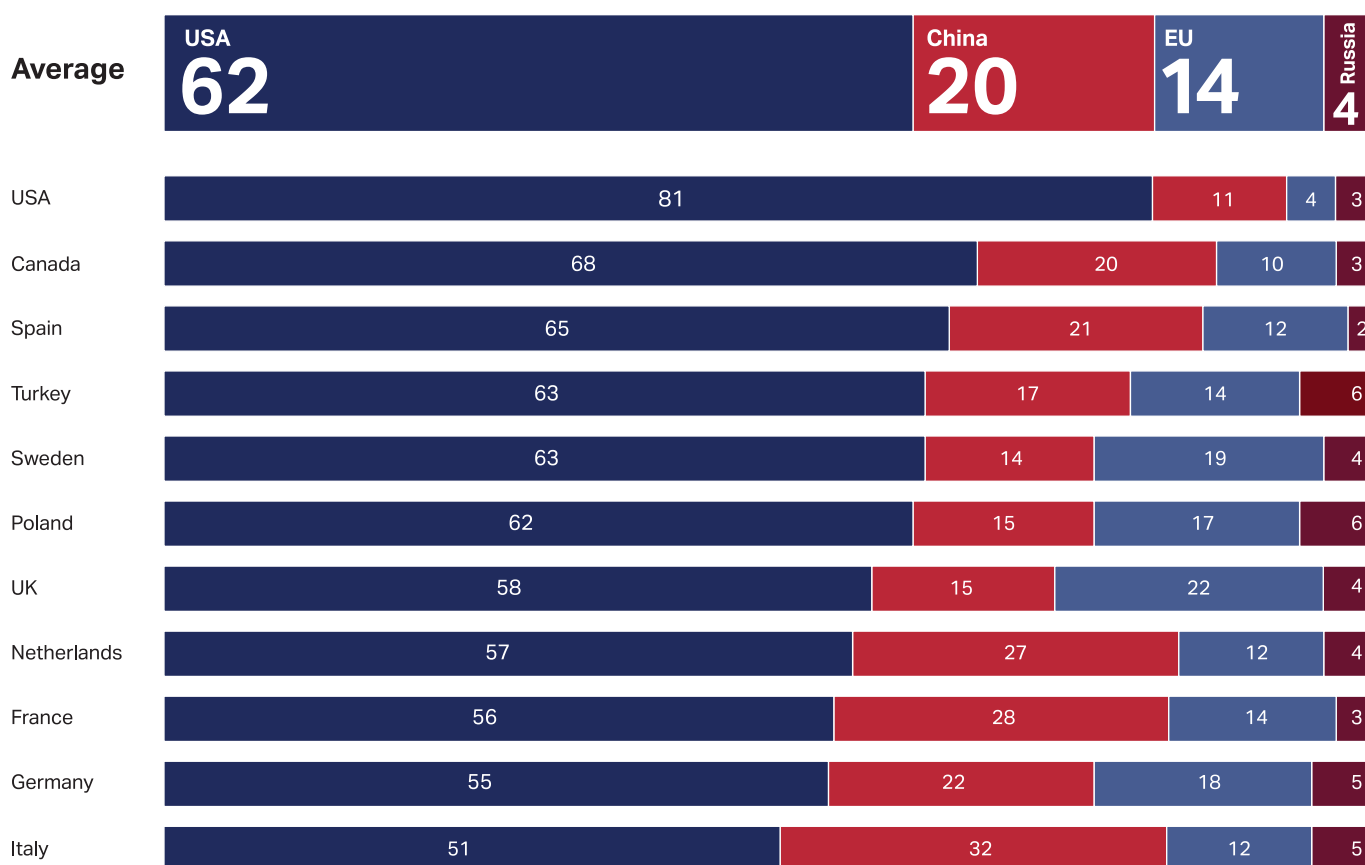
Very few respondents across all countries surveyed view Russia as a leading global player. In Turkey and Poland, Moscow's status is highest, with 6% seeing it as most influential.

SPOTLIGHT

Across most countries surveyed, younger generations (18-24 years-old) see the United States as less influential than older respondents do. Striking generational gaps can be found in Turkey (50% vs. 75% among 55+), the UK (47% vs. 74% among 65+), Poland (45% vs. 81% among 65+), Sweden (43% vs. 70% among 55+), and Germany (42% vs. 62% among 65+).

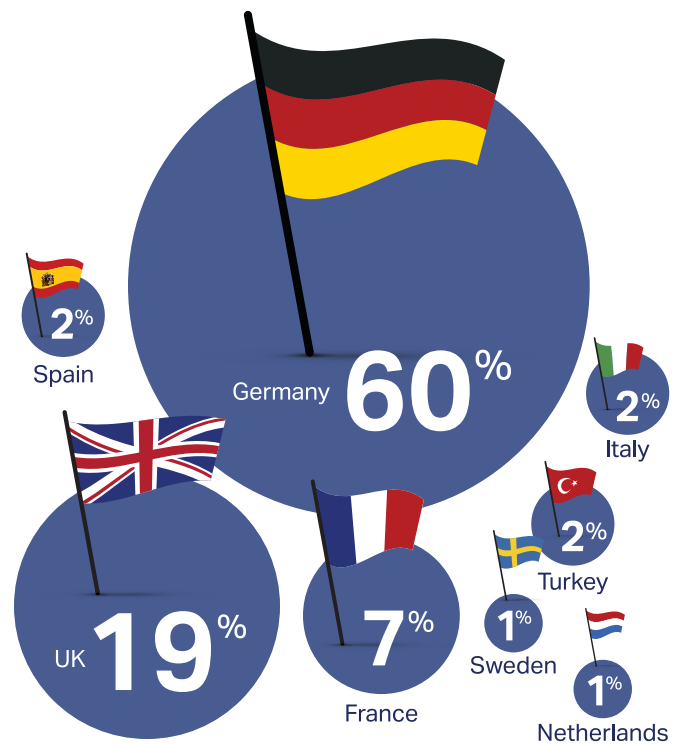
MOST INFLUENTIAL ACTOR IN INTERNATIONAL AFFAIRS

Rank the following actors in the order of which you think is most influential to least influential in global affairs: the United States of America, the European Union, China, Russia. Only most influential shown.



WHICH COUNTRY IS MOST INFLUENTIAL IN EUROPE?

Germany is overwhelmingly considered by European respondents to be the most influential country in Europe (60%), followed by the UK (19%) and France (7%). Americans and Canadians, in contrast, believe the UK is the leading European power.



The consensus over Germany's leading position is strongest in Spain (81%), Italy (79%), and Poland (75%), with strong majorities in Germany (71%) and the Netherlands (69%) agreeing. Also in France, 72% see Germany as Europe's leading power, a result that is unchanged from 2020. Among all EU members, perceptions are most mixed among Swedes, although almost three out of five (59%) also see Germany as the most influential European country.

The views of EU member states and those of non-EU member states differ significantly. Only 23% of Americans and 35% of Canadians view Germany as the most influential European power, a plurality instead choosing the UK as the most influential European power (48% and 44% respectively). The U.S. results are consistent with the 2020 findings.

Respondents in the UK (47%) and Turkey (45%) are also somewhat less likely to think Germany is the most influential, and more likely to see a greater UK role: A quarter of Turks (25%) believe that the UK is the leading power in Europe, and more than one-third (36%) of the British respondents share this opinion.

The decline of French influence in public perception is striking, as only a small minority (7%) across all countries view France as the most influential country in Europe. Less than one-quarter of French estimate their influence in Europe as highest (17%), while almost three-quarters think Germany is Europe's most influential country.

However, French perceptions vary strongly across age groups. Young respondents (18-24) are twice as likely (36%) to see France as the most influential country in Europe, nearly at the same proportion as those who see Germany as Europe's most influential (43%).

SPOTLIGHT

Germans' perceptions of their country's influence within Europe are consistent across all age groups, but do vary according to political affiliation. For those respondents who indicated party preference, CDU/CSU and Green Party members are most likely to say that Germany is Europe's leader (each 80%). In contrast only 54% of supporters of the far-right AfD believe Germany is the most influential country in Europe.

MOST INFLUENTIAL COUNTRY IN EUROPE

Which country is most influential in Europe?
Germany, France, UK, Italy, Poland, Turkey, Sweden,
Netherlands, Spain, Other, none of the above.

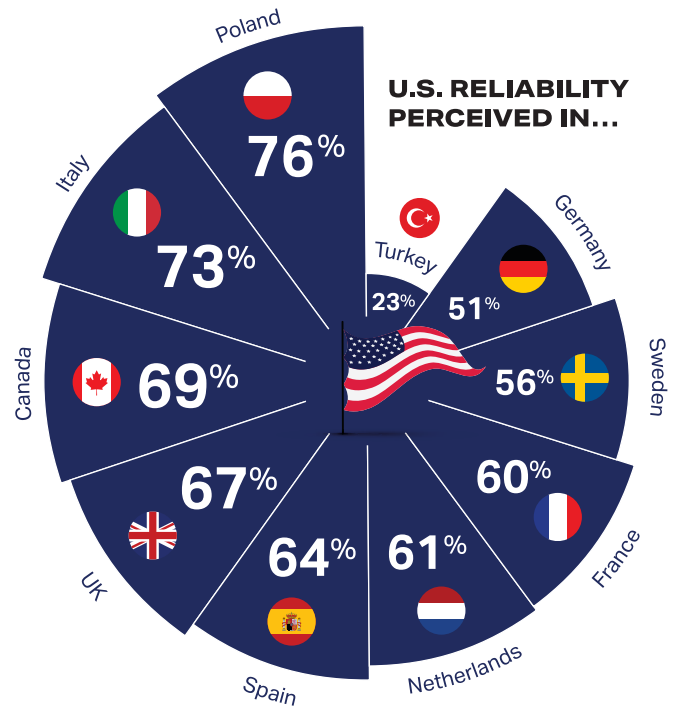
Country selected as the most influential in Europe ►

Respondents		Germany	UK	France	Spain	Italy	Netherlands	Poland	Sweden	Turkey
	Average	60	19	7	2	2	1		1	2
▼	Germany	71	5	11		1				1
	UK	47	36	6	1	1	1			
	France	72	5	17	1	1	1			
	Spain	81	8	2	6	1	1		1	
	Italy	79	7	1	1	9				
	Netherlands	69	8	8	1		5		1	1
	Poland	75	12	3			1	3	1	
	Sweden	59	16	7		1	1		8	1
	Turkey	45	25	6		2	1		2	14
	USA	23	48	9	4	4	1		1	1
	Canada	35	44	10	2	2			1	1

"Other, namely" and "None of the above" responses not included in the chart, values ranging from 0-9

WHICH COUNTRY IS A RELIABLE PARTNER?

On average, Canada is viewed as the most reliable partner across all countries surveyed, followed by Sweden and Germany. Views of U.S. reliability vary across Europe, ranging from 76% in Poland to a strikingly low 51% in Germany.



Despite the various challenges impacting the transatlantic community, most of the countries surveyed are seen as quite reliable partners. The most trust is placed in Canada (75%), Germany (73%), and Sweden (73%) while Poland and Turkey are seen as least reliable on average (45% and 23% respectively). Perceptions of U.S. reliability are mixed across Europe, and lowest in Germany and Turkey. Among EU member states, the Poles have the most trust in U.S. reliability (76%), while the Germans have the lowest (51%). Similarly, U.S. citizens consider their European partners to be reliable (between 57% and 68% for the different EU countries, 69% for the EU). From the U.S. perspective, the most trusted EU allies are France and Germany (both 68%), followed by Sweden (66%) and the Netherlands (64%).

Germany is seen as the most reliable partner in five of the 11 countries: France, Turkey, Spain, the Netherlands, and Sweden. While over two-thirds of Poles view their European and North American partners as reliable, the perception is not reciprocated (on average, less than half of all respondents say Poland is reliable, and less than one-third of Germans and Dutch). Turkey is trusted even less: Two out of five Americans (42%) and almost two-thirds of EU member states' respondents say Turkey is unreliable (76% in Germany and the Netherlands, 74% in Sweden, 73% in Italy, 72% in France). The Turks are also particularly skeptical of their partners, with only half trusting their most trusted partner (Germany, 54%) and around one-quarter trusting France (26%) and the United States (23%).

Generational gaps are prominent but differ across most countries surveyed. Notably, the youngest American respondents find EU countries less reliable than their older compatriots do, especially Americans age 55 and older. Some of the most notable examples include Americans' perceptions of the Netherlands (44% of the youngest vs. 79% of 65+ respondents), Sweden (49% vs. 80% for 55+), and Germany (53% vs. 79% for 65+). Views of cross-country reliability within EU countries also experience a similar generational divide, with more older respondents trusting other EU member states than younger respondents, especially in the cases of France, Germany, and the UK.

SPOTLIGHT

The European Union receives mixed reviews from non-EU member states. While Canada and the U.S. view the EU as a reliable partner (75% and 69% respectively), only half of Britons and 39% of Turks agree.

RELIABLE PARTNERS OF THE COUNTRY (TOTAL; VERY & SOMEWHAT RELIABLE)

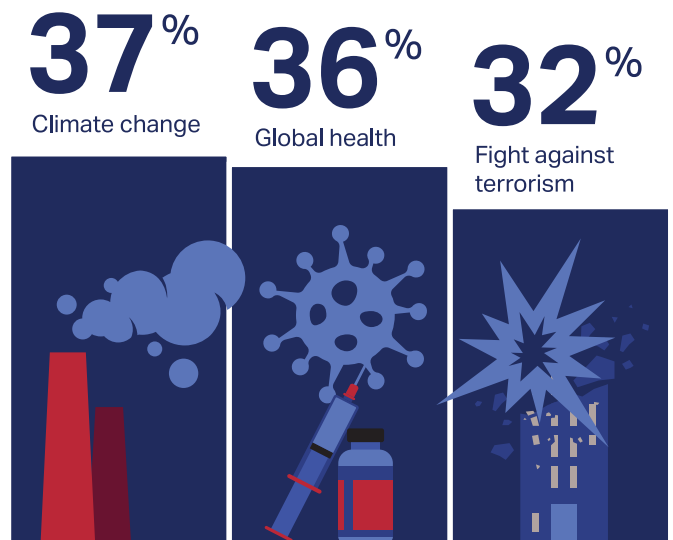
Do you think each of these countries is a reliable partner for your country?

Country selected as the most reliable ►

Respondents ▼		Canada	Germany	Sweden	Netherlands	France	Spain	Italy	USA	UK	EU	Poland	Turkey
	Average	75	73	73	68	66	64	62	60	60	58	45	23
	Canada		74	75	72	75	64	67	69	81	75	55	33
	Germany	71		78	79	76	63	54	51	36		32	15
	Sweden	81	83		78	78	69	64	56	72		42	17
	Netherlands	81	85	85		75	62	50	61	63		31	15
	France	79	84	76	75		74	71	60	47		41	15
	Spain	82	88	83	71	84		81	64	55		54	29
	Italy	71	67	66	56	59	69		73	62		40	16
	USA	80	68	66	64	68	63	66		78	69	57	36
	UK	79	64	72	71	52	62	57	67		51	53	31
	Poland	78	68	80	71	67	72	70	76	72			26
	Turkey	52	54	53	41	26	46	45	23	32	39	43	

WHAT ARE THE MOST IMPORTANT ISSUES FOR TRANSATLANTIC COOPERATION?

Overall, respondents put global health and climate change almost equally at the top of the transatlantic cooperation agenda, followed closely by trade and the fight against terrorism.



As populations across the world continue to battle the coronavirus pandemic, respondents from seven of the 11 countries surveyed rank global health as the number one issue for transatlantic cooperation to tackle. Yet, when asked about their top three priorities, climate change and global health are on the same level (37% and 36% respectively). In both Germany and Sweden, respondents prioritize climate change over global health (an almost 20 point difference). Respondents in the UK, Germany (both 37%), and Canada (35%) see trade as particularly important, while nearly half of French ones prioritize the fight against terrorism (46%). Despite disparities among countries, overall the fight against terrorism (32%), trade (31%), and protection of human rights (29%) rank close behind the top items for transatlantic cooperation.

In Poland and Turkey, climate change does not make it into the top three, with just over a quarter of Poles and Turks prioritizing it for transatlantic cooperation. Americans have a more varied view of the priority issues to be dealt with among transatlantic allies, with a nearly four-way tie between global health (31%), climate change (29%), the fight against terrorism (28%), and the protection of human rights (28%). Global health ranked highest in Italy (49%), Turkey (43%), and Spain (43%), with the lowest proportions in France (23%), Germany (29%), and Sweden (30%). The French find the fight against terrorism to be the most important challenge (46%), while the Swedes rank it second at 38%, and exactly a third of Turks and Britons indicate it among their top three priorities (33%). Across all countries surveyed, transatlantic cooperation vis-à-vis Russia and Iran ranks the lowest on the list of most important issues.

An age difference is noticeable around terrorism, with older respondents much more likely to prioritize terrorism on the transatlantic agenda than younger respondents. In the United States, while 40% of respondents over 55 see combating terrorism as one of the top three priorities, only 17% of 18-24-year-olds do. The trend is similar in France (59% vs. 31%), Sweden (46% vs. 28%), and Italy (37% vs. 15%).

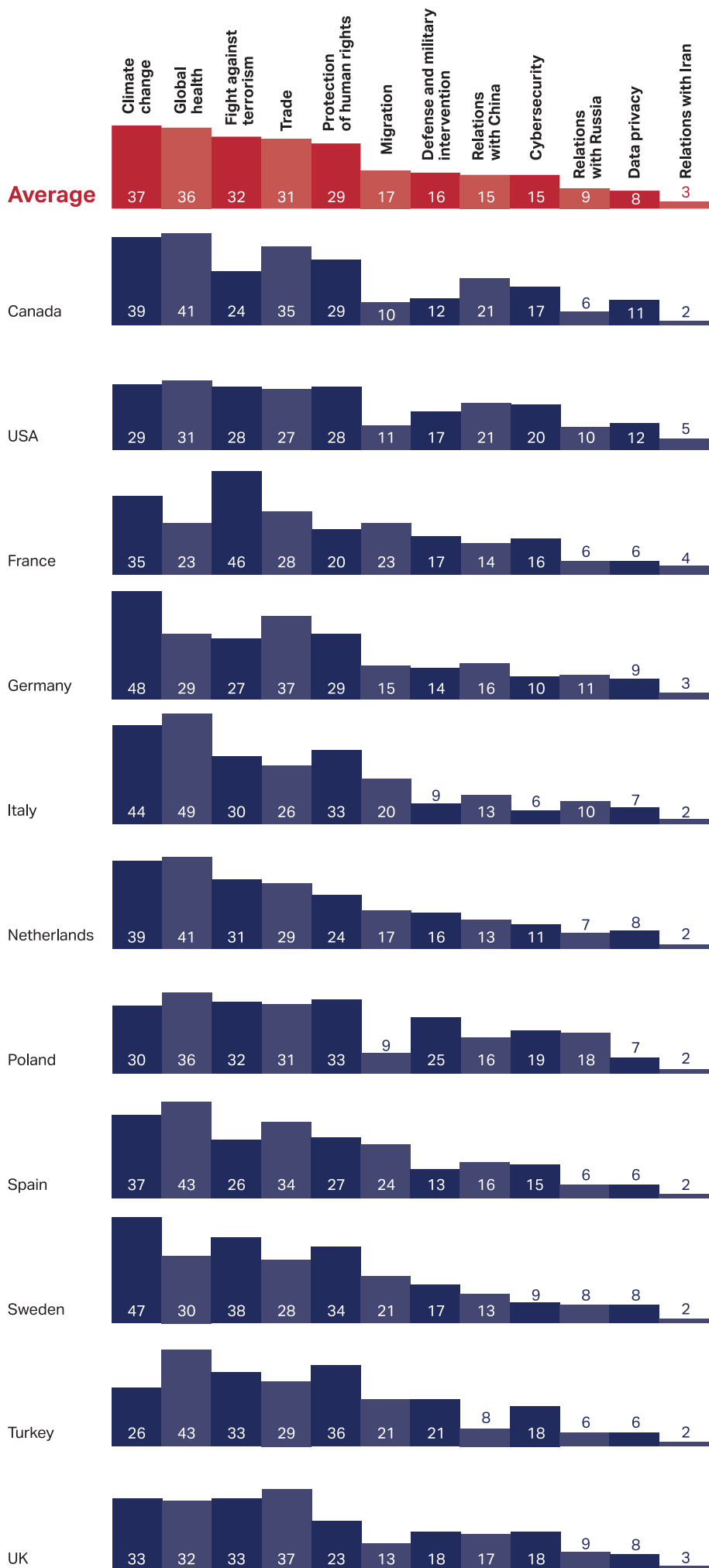
Furthermore, divergences persist along predictable political lines in Western European countries. Respondents aligned with far-right parties are more likely to worry about migration (41% among the Dutch PVV) and terrorism (42% among the French Rassemblement National, 41% among the German AfD), and supporters of pro-business parties are more likely to prioritize trade (38% among the Dutch VVD, 57% among the German FDP). Moreover, Green Party supporters place climate change cooperation at the top of the transatlantic agenda (65% in Germany, 61% in Canada, 57% in the Netherlands, 54% in France).

SPOTLIGHT

In the United States, a partisan divide is evident. A much greater proportion of Democrats chose climate change (36%) and protection of human rights (33%) than Republicans (17% and 20% respectively). Conversely, more Republicans prioritize migration (16% to 7% of Democrats).

IMPORTANT ISSUES FOR TRANSATLANTIC COOPERATION

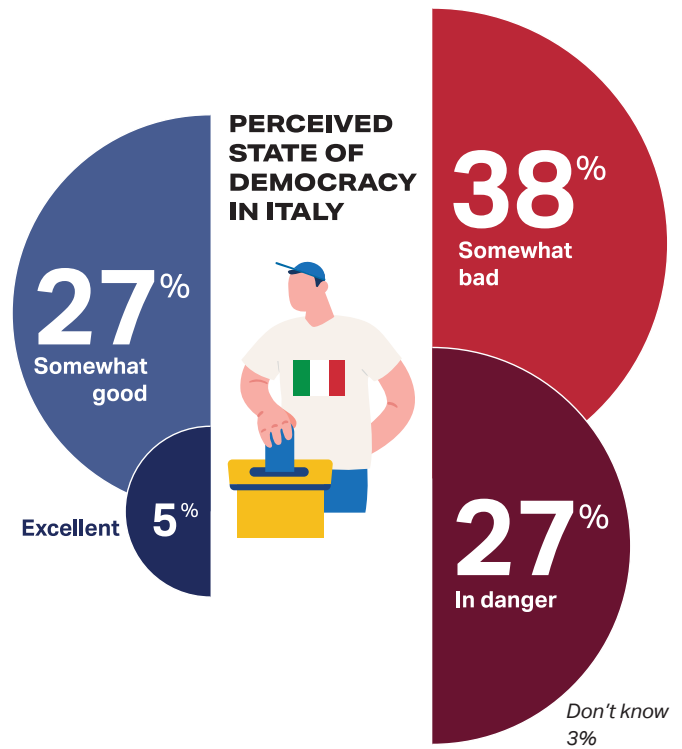
Among the following issues, which do you think are the three most important issues for transatlantic cooperation?



"None of the above" responses not included in the chart, values ranging from 2-7

HOW STRONG IS YOUR COUNTRY'S DEMOCRACY?

Overall a plurality believe the state of democracy in their country is somewhat good. However, Italian, Polish, and Turkish respondents have a more negative outlook, and a plurality of Turks believe that their democracy is in danger.



Overall, citizens on both sides of the Atlantic appear to be satisfied with the state of democracy in their respective countries, especially in Sweden (76%) and Canada (75%), where two-thirds think their democracy is somewhat good (56% and 55% respectively) or excellent (20% and 21% respectively). Nearly as many in the UK also have a positive assessment of their democracy (70% somewhat good or excellent).

Views in Spain and France are nearly evenly split. 50% of the French and 52% of Spaniards are satisfied with the state of their democracy, compared with 45% and 46% who are not. On the other hand, about two-third of Italians (65%), Turks (63%), and Poles (61%) have negative views of the state of their democracy. In Turkey 39% of respondents

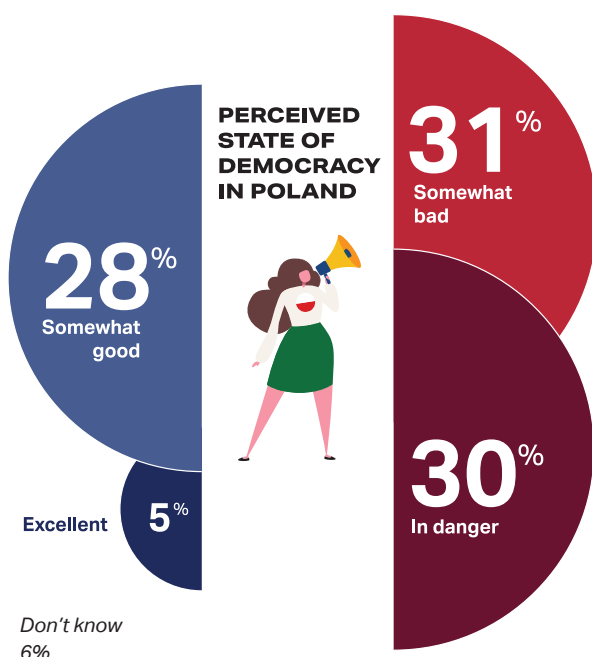
believe their democracy is in danger, and Italian and Polish respondents share similar concerns, with 27% and 30% respectively seeing their democracy in danger.

In the aftermath of the 2020 U.S. presidential election, a majority of Americans have positive views of the state of their democracy (55%). Interestingly, despite a narrow majority being satisfied in general, Americans, alongside Canadians, are most likely to think that their democracy is in an excellent state (21% in both countries).

Across all countries, far-right supporters think their democracy is in trouble (either somewhat bad or in danger), including those of the AfD in Germany (79%), the Rassemblement National in France (71%), and the Sweden Democrats (45%). As might be expected given the most recent hotly contested election, a partisan divide appears in the United States: 66% of Democrat respondents indicate an overall positive view of American democracy, compared to 49% of Republicans.

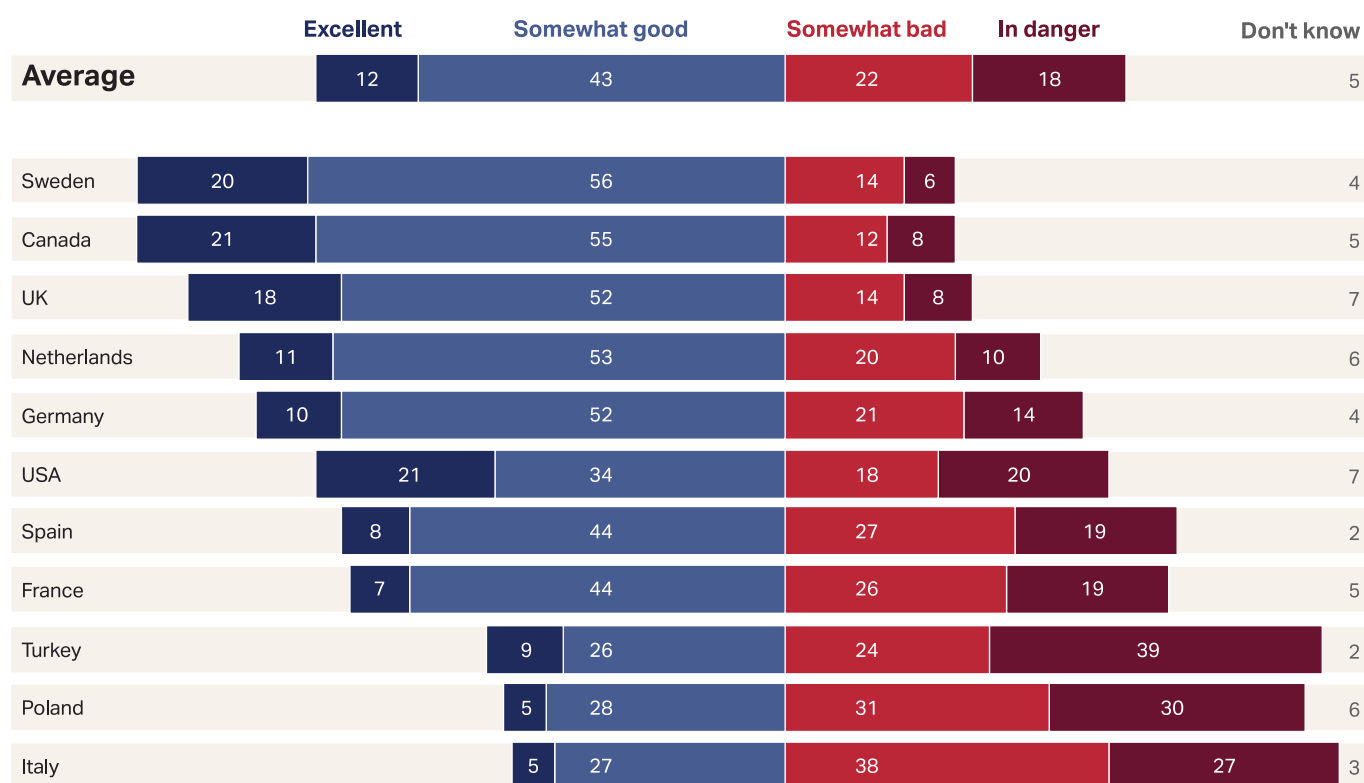
SPOTLIGHT

Views of democracy in Germany are mixed both politically and geographically. In eastern Germany, only 48% of respondents have a positive view of the state of German democracy, which is significantly lower than in the north (62%), south (64%), and west (67%) of the country. While CDU/CSU (85%), SPD (83%), and Green voters (76%) are satisfied with the state of German democracy, only 58% of Left voters, 49% of FDP voters, and 17% of AfD voters share this positive assessment.



STATE OF DEMOCRACY

How do you perceive the state of democracy in your country?





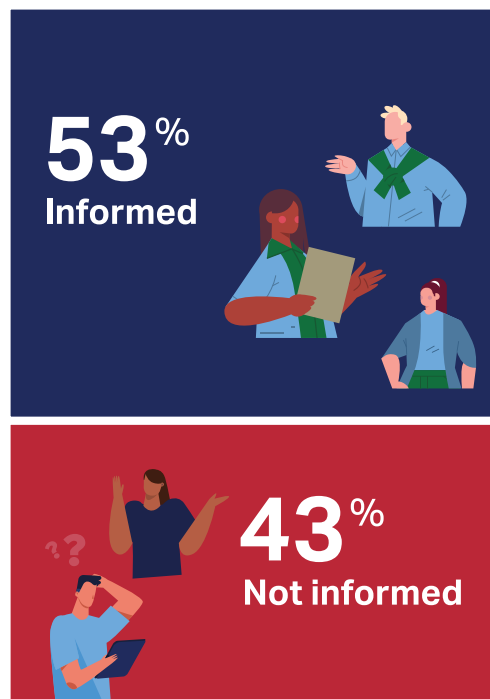
International Security and Defense

HOW INFORMED DO YOU THINK YOU ARE ABOUT THE FOREIGN POLICY OF YOUR COUNTRY?

Most respondents indicate that they are somewhat informed on the foreign policy of their respective countries. A plurality of Italian and French respondents, however, believe they are not very informed.

This question serves to provide a baseline for respondents' own view of their understanding of the foreign-policy related issues asked about in this survey. Overall, a majority of respondents are either somewhat or very well informed about their countries' foreign policy. The results of this question are consistent with the other results recorded in the survey. Most notably, only an average of 5% of respondents chose "don't know" across the questions in the survey.

Across all countries surveyed, half of the respondents (53%) indicate that they are informed on their country's foreign policy stance (43% are somewhat informed, and 10% are very well informed). Turks, Poles, and Americans possess the highest levels of confidence about their foreign policy knowledge: 66%, 59%, and 57% respectively somewhat or very well informed. On the other hand, French and Italian respondents appear to be least well informed about foreign policy, with half (51% and 54%) indicating they are not informed about international affairs.



Don't know - 5%

In all countries, there are myriad divides according to various indicators, mainly gender, age, socioeconomic status, and education. In all countries, men indicated higher levels of foreign policy knowledge than women, with the biggest gender gaps in Canada (63% vs. 36%), the United States (71% vs. 43%), and the UK (65% vs. 40%). Many, but not all, countries have a generational divide, with older respondents more likely to be foreign policy savvy than younger respondents. Unsurprisingly, respondents from higher socioeconomic and education levels have greater confidence about their foreign policy knowledge than those of lower ones, with the biggest disparities in the United States and Italy (78% of middle-upper earners vs. 41% of lower earners and 59% of Italians with advanced education vs. 33% with basic education).

SPOTLIGHT

Despite France's diplomatic and military engagement abroad, more than half of the respondents in France describe themselves as not informed about French foreign policy, without variation across age groups. Even among the respondents holding a master's degree (or higher) and graduates from French elite universities, only half of the respondents (51%) describe themselves as informed, compared to 41% on average.

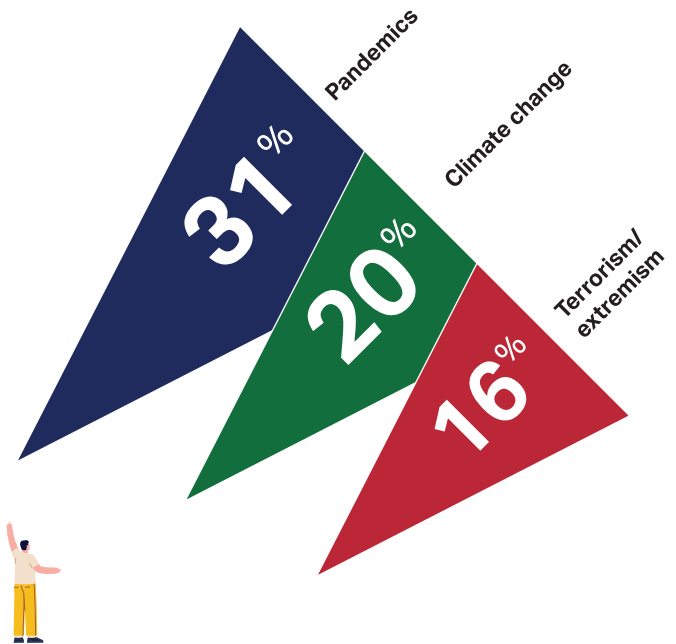
LEVEL OF INFORMATION ON FOREIGN POLICY

How informed do you think you are on the foreign policy of your country?

	Very well informed	Somewhat informed	Not very informed	Not at all informed	Don't know
Average	10	43	35	8	5
Turkey	14	52	23	5	6
Poland	9	50	28	8	5
Spain	10	48	34	7	1
USA	18	39	26	11	6
Germany	8	46	34	5	7
Sweden	11	45	33	6	5
UK	10	42	32	10	5
Canada	8	41	35	11	5
Italy	5	37	47	7	4
France	6	34	43	8	8
Netherlands	4	36	45	9	6

WHAT IS THE MOST IMPORTANT SECURITY CHALLENGE?

In a majority of countries, pandemics are perceived to be the most important security challenge, but climate change, terrorism, and migration are also considered by many to be critical issues in the years ahead.



In the midst of the ongoing coronavirus crisis, pandemics emerge as the most important or second most important security challenge on both sides of the Atlantic. While countries in Europe and North America are currently at different stages of the crisis, they continue to generally share a similar level of concern. The results, however, also show that the pandemic has not overshadowed all other concerns. The threat of terrorism ranks first or is tied for first in three of the surveyed countries, and overall concern about climate change is also high. In the United States and France in particular, terrorism is perceived as a much more pressing challenge in 2021 than it was shortly after the coronavirus outbreak in 2020.

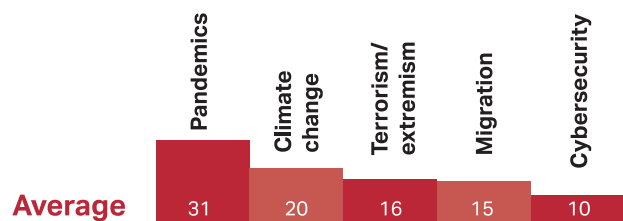
The results reveal a variety of national threat perceptions. While 56% of Poles, 43% of Spaniards, and 42% of Italians see pandemics as the most important security challenge, only around 20% of Britons, Americans, and French share the same view. A significant proportion of people in France (30%), Turkey (24%), the UK (23%), and the United States (22%) appear to be concerned by the threat of terrorism, whereas very few Poles or Spaniards (6% and 7%, respectively) view terrorism as an important challenge.

The perception of climate change as a security challenge also varies across countries. Concern is highest in Germany and Canada, where nearly one-third (29% and 28% respectively) see it as the most important issue, whereas only 15% of Poles and only 10% of Turks place high importance on climate change. Finally, migration is seen as a key challenge in Spain (20%) and the Netherlands (20%), and is the most important challenge for the Swedes (28%).

The results align with political affiliation in expected ways. Nearly one-third of Democrat-leaning Americans see pandemics as the most critical security issue, versus only 15% of Republican-leaning respondents. In contrast, 23% of Republican-leaning respondents chose migration as the top security challenge, compared to only 6% of the Democrats.

SPOTLIGHT

In France, 38% of those 55 and older rate terrorism as the top challenge, in contrast to only 25% of the 18-24 year-olds and 19% of the 25-39 year-olds. A similar variation is noticeable in the UK and Turkey, with older respondents 8-11 points more concerned about the terrorist threat.



MOST IMPORTANT SECURITY CHALLENGE

What is the most important security challenge for your country to address in the years to come?



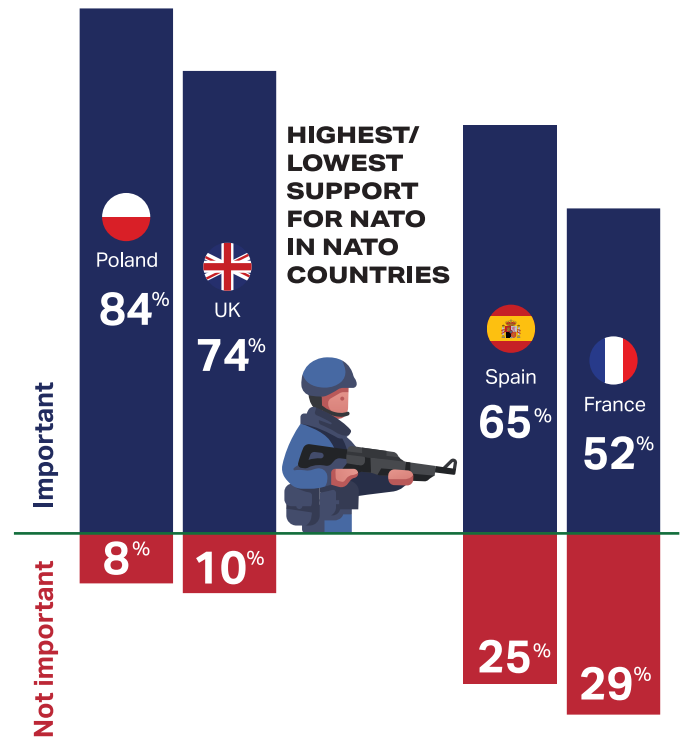
"Nuclear proliferation", "Threat from another state/ which one?", "None of the above" responses not included in the chart, values ranging from 0-7

HOW IMPORTANT IS NATO FOR THE SECURITY OF YOUR COUNTRY?

A majority of the population across all countries see NATO as either very important or somewhat important to the security of their country. More than 80% of respondents also say that they know what NATO is.

The populations in the countries surveyed remain widely convinced that NATO is either somewhat important or very important to their national security. This confirmation of NATO's relevance on both sides of the Atlantic comes as the Biden administration has reaffirmed U.S. engagement in NATO. Interestingly, across the 11 countries polled, only very few respondents (10% or fewer) believe that NATO is not at all important. The level of general awareness of NATO's nature and mission is also remarkable, as an overwhelming majority—between 80% (in the U.S.) and 93% (in Poland)—of respondents say that they are familiar with NATO.

Two EU countries have outlying results. In Poland, the perception that NATO is important for national security is overwhelming. In total, 84% of Poles consider NATO either somewhat important (41%) or very important (43%), and only 8% see NATO as less or not at all important. France is at the other end of the spectrum, though even here support for NATO is still relatively high: Just over half of the French (52%) think that NATO is either somewhat important or very important to their country's security. This remains stable from 2020, when 53% of the French population expressed the same view.



In total, only 12% of the French answered that NATO was very important—half as many as in Germany, Italy, Spain, or the Netherlands. The French are also the most likely to consider NATO as not very important or not important at all (30% vs. 16% of Americans and 10% of Britons). Overall, NATO is also perceived as particularly important in the UK (74%) and the Netherlands (71%), and roughly two-thirds of the respondents in all other countries (67% on average) share this belief. In Sweden, which is not a NATO member state, support is somewhat lower (57%). On average, only 16% of the respondents consider NATO to be not important to the security of their country, and the share of people considering NATO unimportant is lowest in Poland (8%), Canada (14%), and the Netherlands (15%).

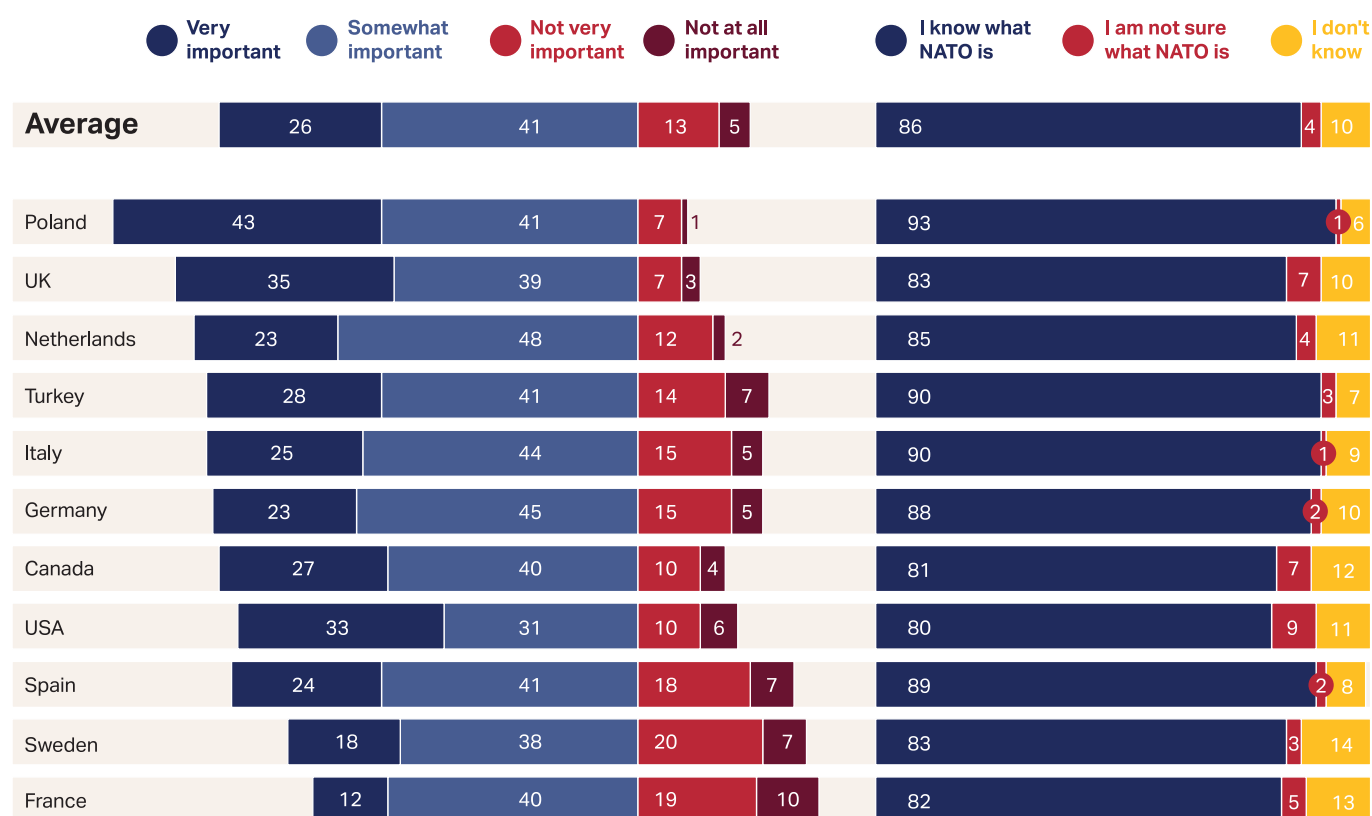
Across the other NATO member states polled, the results are remarkably consistent. Large majorities (between 64% and 74%) affirm the importance of NATO. Across demographics within countries there is also a striking homogeneity. With a few minor exceptions, the importance of NATO finds consensus in the respective public independent of age, party affiliation, education, region, or income.

SPOTLIGHT

In most cases, men are more likely to see NATO as important than women do, as are older generations compared to the younger generations. In the UK, NATO is seen as somewhat important or very important by more than 80% of those 55 and older, whereas about half as many of the 18-24 year-olds agree that NATO is important (48%). A similar 30-point difference between generations can be seen in the Netherlands.

IMPORTANCE OF NATO IN THE SECURITY OF THE COUNTRY

How important is NATO in the security of your country?



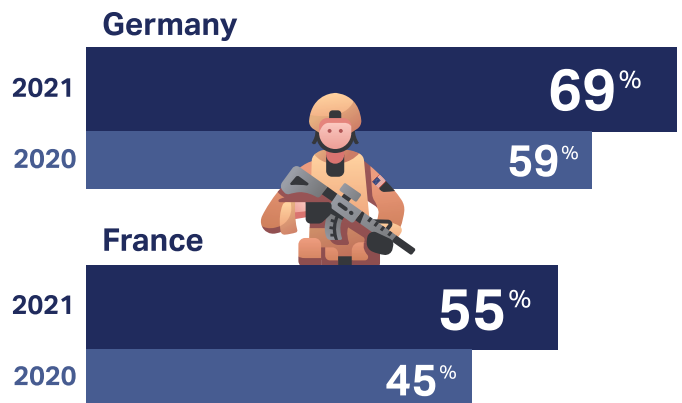
HOW INVOLVED SHOULD THE UNITED STATES BE IN THE DEFENSE AND SECURITY OF EUROPE?

A majority of people think that the United States should be somewhat or very involved in the defense and security of Europe, except in Sweden, which is divided, and Turkey.

Europeans continue to rely on U.S. security guarantees, and generally expect or want the United States to remain committed to the defense of the continent. Despite some differences regarding the priorities for transatlantic cooperation, people in eight of the ten European countries surveyed share a positive view of U.S. involvement. A vast majority of Americans also continue to approve of U.S. involvement in European security, including a quarter who think the U.S. should be greatly involved.

Four countries stand out. Poles and Americans show a higher level of support, with respectively 84% and 69% saying that the United States should be somewhat or greatly involved in European security and defense. In both countries, this view is shared across the population, although older generations are even more supportive of U.S. involvement than younger ones.

In Sweden (46%) and Turkey (31%), in contrast, less than half the population thinks that the U.S. should be somewhat or greatly involved in the security of Europe.



In all the other countries surveyed, between 54% (France) and 69% (Germany) are in favor of U.S. involvement, and nearly a quarter of Germans and Spaniards think the United States should be greatly involved in securing Europe.

In the United States, political affiliation correlates with opinion on NATO, with 79% of the Democrats in favor vs. 63% of the Republicans, but the approval remains well above 50% across demographics and parties. Party affiliation can also account for particularly high support for U.S. involvement in Poland, with more than nine out of ten respondents which lean toward the governing PiS (91%) and PO (92%) parties in favor of U.S. involvement. Among the German respondents, support is highest among the CDU/CSU (83%), the SPD, and the Greens (both 80%).

SPOTLIGHT

There is a notable increase in French and German support for a U.S. role in Europe compared to one year ago. In 2020 survey results, 45% of French and 59% of Germans supported U.S. involvement. This climb of 10 points in France and Germany is remarkable given that the French and German perceptions of the United States' global influence are stable compared to 2020.

INVOLVEMENT OF THE UNITED STATES IN THE DEFENSE AND SECURITY OF EUROPE

How involved should the United States be in the defense and security of Europe?

	Greatly involved	Somewhat involved	Not very involved	Not at all involved	Don't know
Average	19	41	20	10	9
Poland	32	52	7	3	6
USA	25	45	15	5	11
Germany	24	45	13	9	9
Netherlands	19	47	20	4	11
Italy	19	45	22	6	8
UK	20	44	19	7	11
Spain	22	38	21	14	6
France	10	45	24	10	12
Sweden	13	32	32	12	11
Turkey	10	21	30	29	10

SHOULD YOUR COUNTRY INCREASE OR DECREASE MILITARY INVOLVEMENT IN THE MIDDLE EAST?

A plurality of the respondents want to decrease their country's military involvement in the Middle East, in most cases because they support a general reduction in foreign interventions.

All the countries surveyed have been involved in some form of military intervention in the Middle East in the past decade, though to varying degrees. The crises in Syria and Iraq have also directly affected European security, while the call to end the “forever wars” has been one of the key foreign policy trends of the 2020 U.S. elections.

On both sides of the Atlantic, people strongly reject the idea of increasing their military involvement in the Middle East: While 23% of Turks and 14% of Americans support more engagement, less than 10% of the respondents in all other countries agree. Around a third of respondents (33%) want to maintain the same level of military involvement, and between a third (32% in Turkey) and two out of five respondents (41% in France and Spain) want to decrease it. Around 20% of respondents say that they do not have an opinion, though the numbers in the United States and Turkey are a bit lower (17% and 14%, respectively).

There is a significant generational gap in almost all countries, with older people much more likely to say that they want to decrease the military presence in the Middle East than those aged 18-24. In Germany, 52% of the respondents 65 and older support a decrease, versus 16% of the respondents under 25. A similar difference of 20 to 30 points between the two age groups can be seen in Italy, the UK, Turkey, France, Sweden, Spain, and the Netherlands. Younger respondents are also more likely to say that they do not have an opinion.

Increase military involvement

9%

Maintain military involvement

33%

Decrease military involvement

37%

Don't know - 22%

In the United States, Republicans and Democrats gave remarkably similar answers, with respectively 33% and 34% in favor of decreasing military involvement, 34% and 35% wanting to maintain the current level of involvement, and 16% and 17% supporting an increase.

When asked why they support a decrease in military involvement, respondents do not want to pass the responsibility of military intervention to another country, nor are they motivated by cost—except in France where cost concerns ranked a close second. This view that military interventions should in general be reduced is the top reason for lessening involvement across the 11 countries and is particularly strong in the U.S., the UK, Canada, Spain, and Germany.

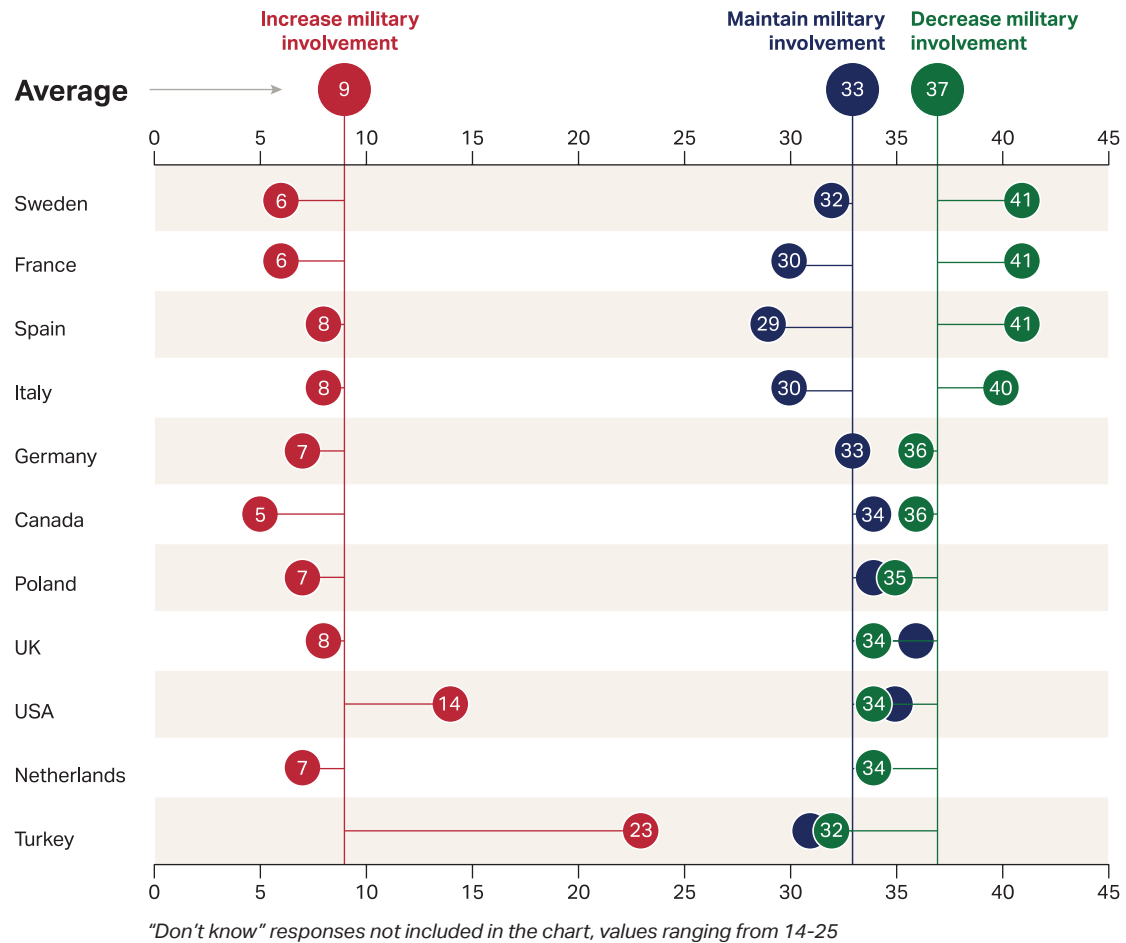
SPOTLIGHT

The French are among the most skeptical of military involvement of their country in the Middle East, with 41% in favor of a decrease. This view is shared across regions and economic status, but is particularly strong among older respondents, with 53% of those 65 and above saying that they want to reduce military interventions. Only 19% of the 18-24 year-old French share this view, while 46% are in favor of maintaining the current level of involvement.

YOUR COUNTRY'S INVOLVEMENT IN THE MIDDLE EAST

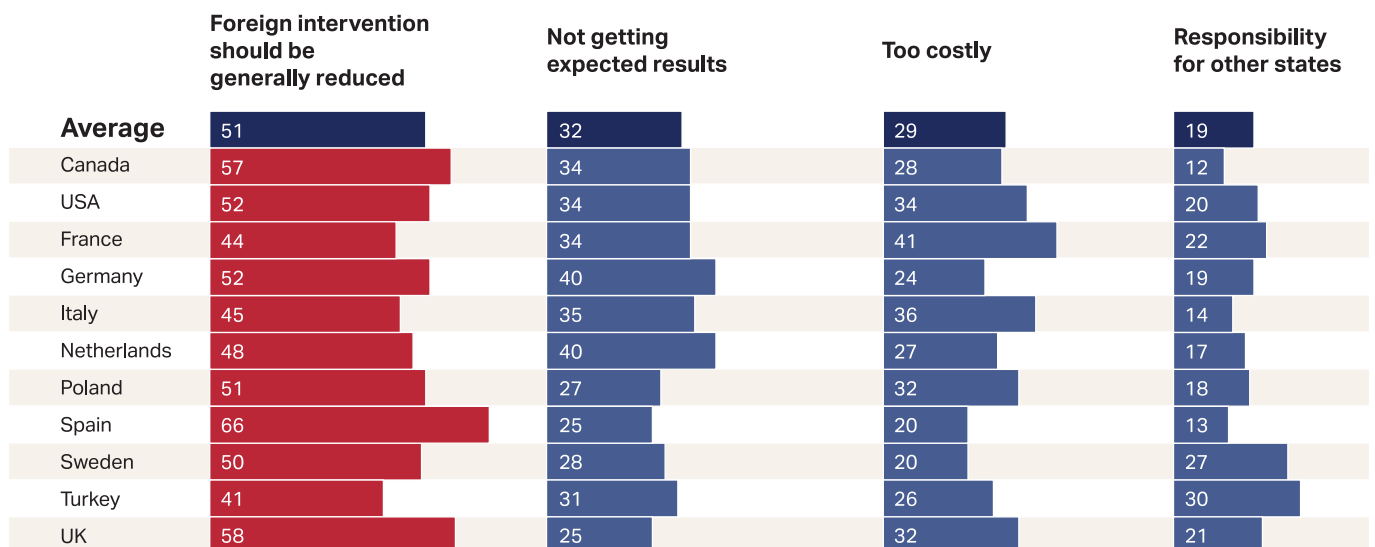
Do you think your country should...

- Increase military involvement in the Middle East
- Maintain military involvement in the Middle East
- Decrease military involvement in the Middle East



REASONS FOR DECREASING INVOLVEMENT

Why should your country decrease military involvement?

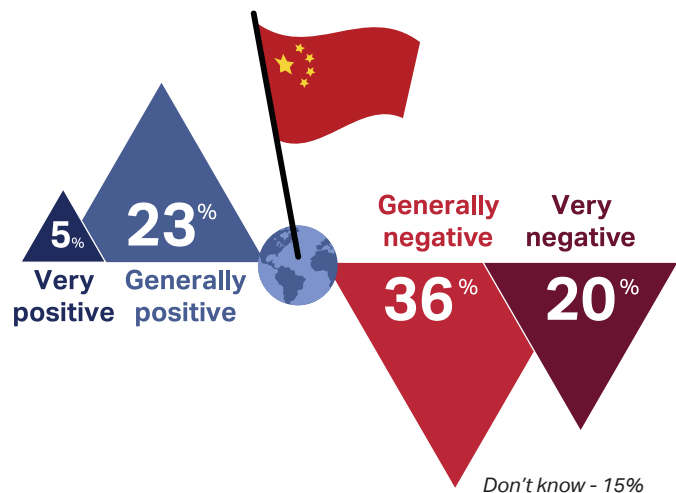


Relations with China



HOW DO YOU FEEL ABOUT CHINA'S INFLUENCE IN GLOBAL AFFAIRS?

In all 11 countries covered by the survey, people feel generally negative about China's influence in global affairs. Yet, there are signs this could change as Beijing's influence is viewed more positively among younger respondents.



Especially since the outbreak of the coronavirus pandemic, China has been receiving growing attention on both sides of the Atlantic. It seems that China's management of the pandemic has not benefited its image among Western populations. Across all countries in the survey, a plurality have a negative perception of Beijing's influence in global affairs. However, the perception of China is a bit more positive in Turkey (34%), Poland (35%), and Italy (36%)—all countries that are part of China's Belt and Road Initiative—and positive assessment reaches its peak in Spain (37%).

With almost two-thirds of respondents on average considering Beijing's influence generally or very negative, Germans (67%), Canadians (63%), and Swedes (62%) have the most critical stance vis-à-vis China. In most other countries covered, over half (54-59%) of respondents had an either very or generally negative view of China's influence.

How respondents perceive Beijing's influence strongly varies with age: While a positive image of China prevailed particularly in the age group of respondents between 18 and 24, negative views of China increase with age. This might indicate a long-term change in public opinion on

China over time across the Atlantic. While gender does not play a significant role, party affiliations affected views of China—though not along a consistent left-right spectrum across countries. Republican-leaning Americans (63%), supporters of the populist Five Star Movement in Italy (68%), Greens in Germany (81%), and the liberal-conservative Moderaterna in Sweden (76%) have a more negative perception of China than their compatriots from other political parties.

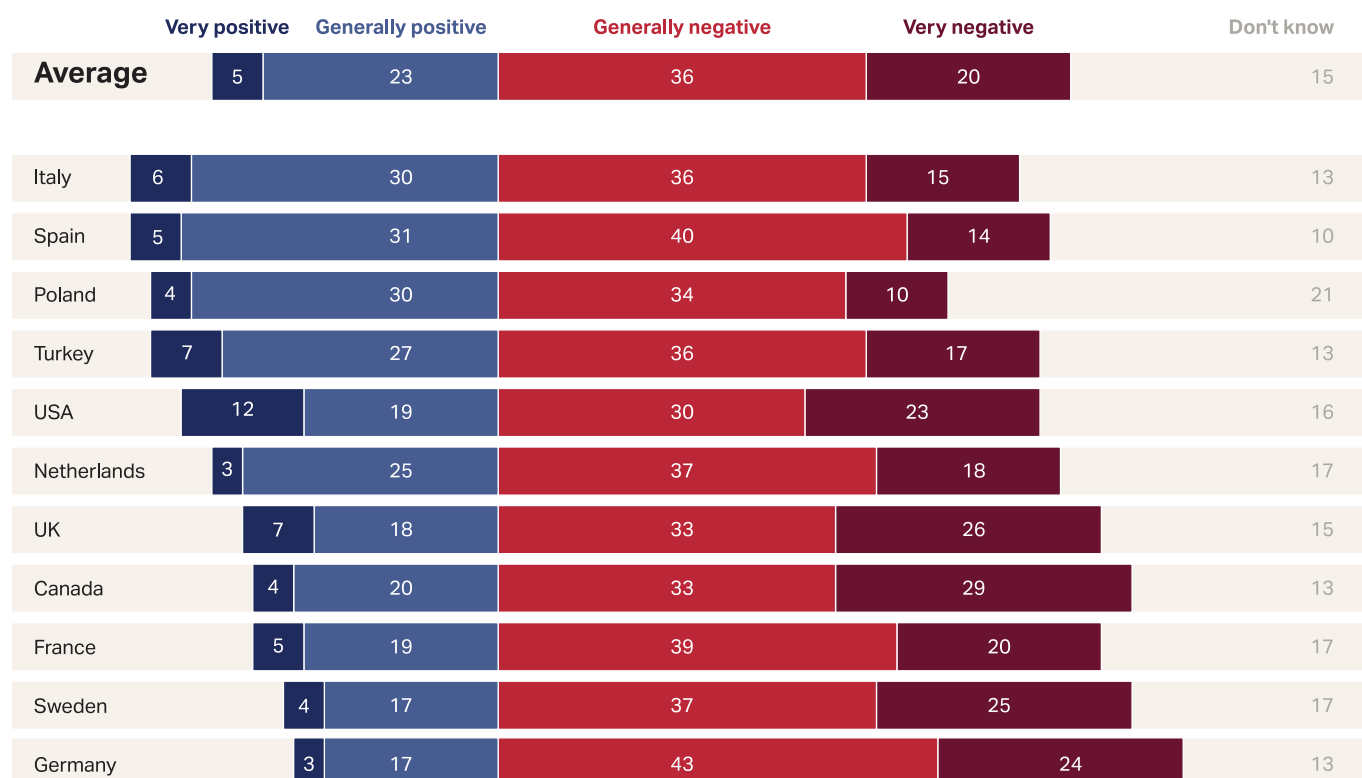
Americans have the most divergent views. The number of respondents viewing China's influence as "very positive" (12%) is highest among Americans, while the number with "very negative" views is also among the highest (23%). Americans also have the largest age gap. A striking 83% of Americans 55 and older view China's influence as negative while among 18-24 year-olds only 39% view Beijing's clout with skepticism.

SPOTLIGHT

The perception of China's influence as mainly negative has barely changed in France and Germany compared to the post-pandemic results in 2020 (increase by 1 point in France and 6 in Germany). However, in the United States, China's image improved significantly from 20% seeing China's influence as positive in 2020 to 31% now, and this is even higher than the pre-pandemic level (29%). China's image has improved across all age groups, but most strikingly among the 25-34 year-old (+15 points) and the 35-44 year-old (+27 points) Americans.

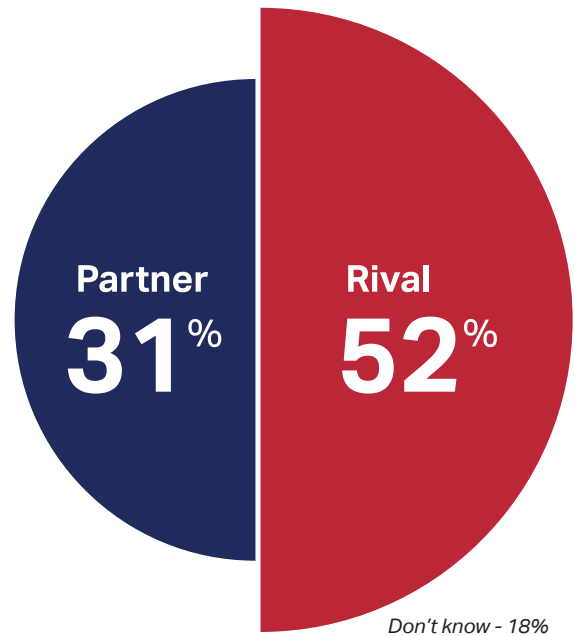
SENTIMENT ABOUT CHINA'S INFLUENCE IN GLOBAL AFFAIRS

How do you feel about China's influence in global affairs?



DO YOU PRIMARILY PERCEIVE CHINA AS A PARTNER OR A RIVAL?

China is considered “more a rival than a partner” by the majority in nine of the eleven countries surveyed. The perception of China as a rival prevails particularly in Canada, the United States, and western Europe.



In 2019, the European Commission labeled China “a negotiating partner, an economic competitor, and a systemic rival.” The ambiguity of this relationship is reflected in public opinion on bilateral relations of the countries surveyed with China. With the exception of the United States, where one in four respondents (26%) views China exclusively as a rival, very few respondents in other countries have such a distinct opinion. A majority of respondents in most of the countries surveyed label China “more a rival than a partner.” However, there is an important east-west and north-south divide on respondents’ perception of China: While China is primarily perceived as a rival in the U.S. (70%), France (62%), the UK (60%), and Canada (58%), China enjoys most favorable views as a partner in Spain (49%), Poland (45%), and Italy (36%).

In Canada, the U.S., Germany, and the UK, younger respondents hold a remarkably cooperative view on their country’s relationship with China. While the perception of China as a partner prevails among two out of five (42%) Canadians and Germans aged between 18 and 24, this is not even the case for one-third of the entire public (27% in

Canada, 28% in Germany). This generational trend is also found in the U.S. and the UK: A quarter of young respondents in the U.S. (25%) and UK (29%) consider China as a partner, an increased percentage compared to the national average (15% in the U.S., 20% in the UK). Furthermore, a similar pattern can be found among 18-24 year-old respondents in France: Although their views regarding China as a partner do not significantly differ from other age groups, half of the respondents in this age group consider China a rival (52%), compared to almost two-thirds (62%) of the French national average.

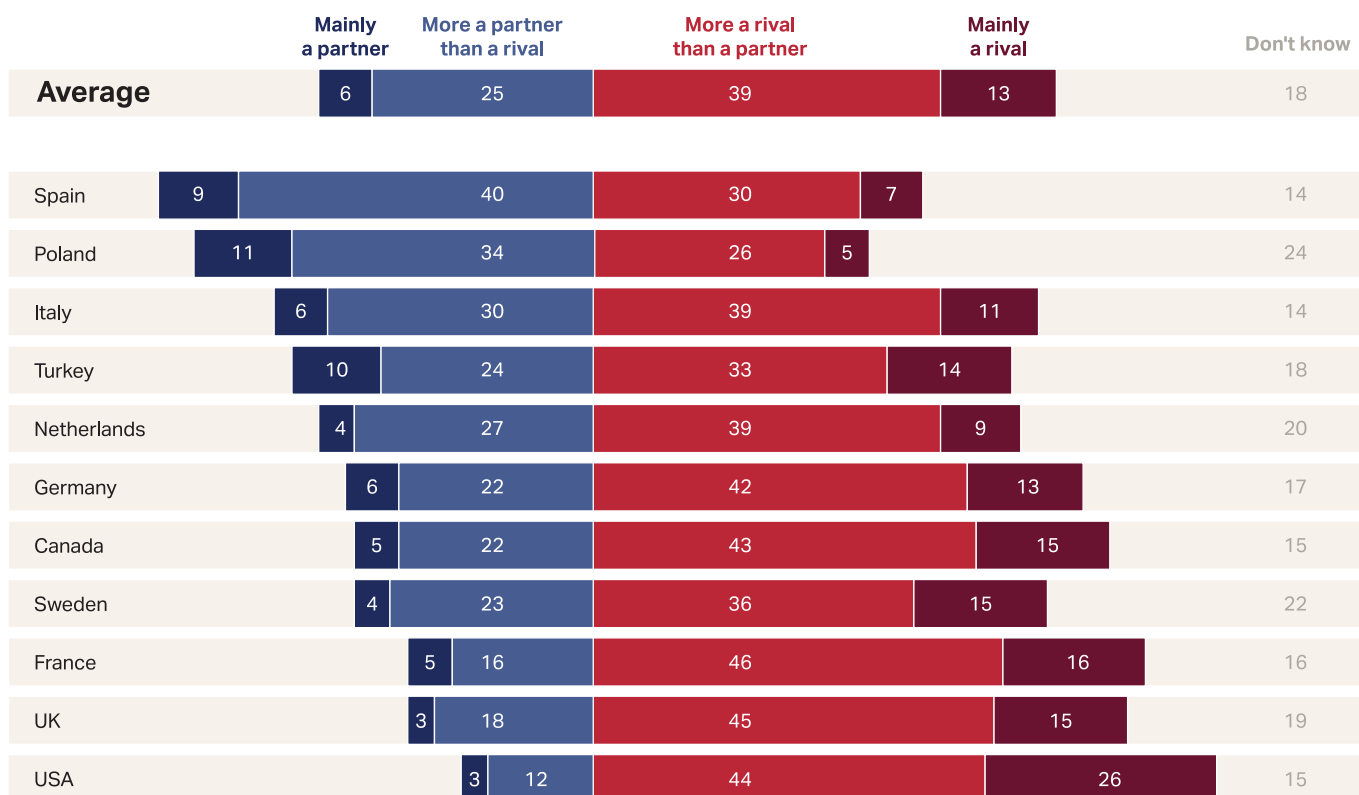
Besides the generational divide, there is a high level of homogeneity in public opinion on bilateral relations with China. Across countries, neither income, location, nor employment have a significant effect on how respondents perceive their country’s relationship with China.

SPOTLIGHT

Men are more likely than their female compatriots to consider China as a rival, with the most important gender gap regarding these perceptions found among British respondents (73% of men compared to 49% of women).

RELATIONS WITH CHINA

How do you primarily perceive your country's relationship with China?

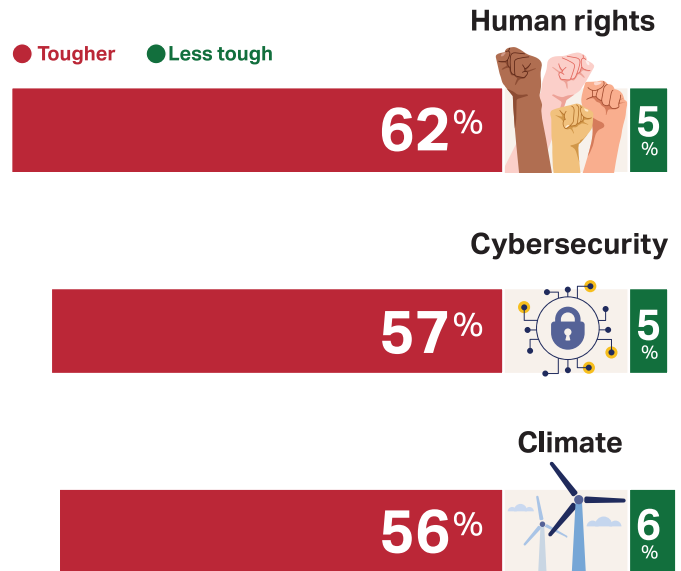


SHOULD YOUR COUNTRY TAKE A TOUGHER OR SOFTER APPROACH TO CHINA?

Respondents in all countries show strong support for a tougher stance toward China—especially on human rights, climate change, and cybersecurity.

The debate whether governments should adopt a harsher stance toward China has become increasingly important in the public sphere on both sides of the Atlantic over the last year. Across all countries surveyed, there is an overwhelming consensus that their governments should adopt a tougher stance vis-à-vis China when it comes to protection of human rights, cybersecurity, and climate change. On trade and technological innovation, majorities are in favor of either maintaining the current state of affairs or getting tougher with China. In France, the support for a tougher attitude toward China is above cross-country average in all domains, whereas a plurality of Turkish respondents favor maintaining the status quo on most issues. But even in Turkey at least one in five want a more robust approach across all issues. In all countries, support for a tougher stance toward China is lowest on technological innovation.

In all countries, a majority of respondents think that governments should adopt a tougher stance toward China on human rights, albeit with important variation: While roughly two out of five respondents in Turkey (44%) share this view, this is the case for 69% of the Swedish and German respondents. Likewise, there are some important transatlantic differences in public opinion: Although EU and U.S. governments have repeatedly confirmed their willingness to cooperate both on climate change and on China, the opinions of the European and American public on their preferred approach toward China in the domain of climate change diverge strongly. Roughly two out of three respondents in France, Sweden (each 65%), Germany (63%), Spain (64%), and Italy (60%) are in favor of their governments adopting a tougher attitude vis-à-vis China, whereas this is only the case for 46% of American respondents.



It is striking that the youngest respondents (18-24 year-olds) are much less supportive of a tougher attitude toward China on cybersecurity than respondents older than 55 years, for instance in Canada (40% vs. 77%), Germany (49% vs. 73%), or Poland (46% vs. 72%).

Compared to the results of the survey conducted in May 2020 French, German, and American support for a tougher stance on China has significantly risen across all policy fields. On subjects of cybersecurity and technological innovation, support for a tougher approach vis-à-vis China increased by more than 10 points in all three countries.

SPOTLIGHT

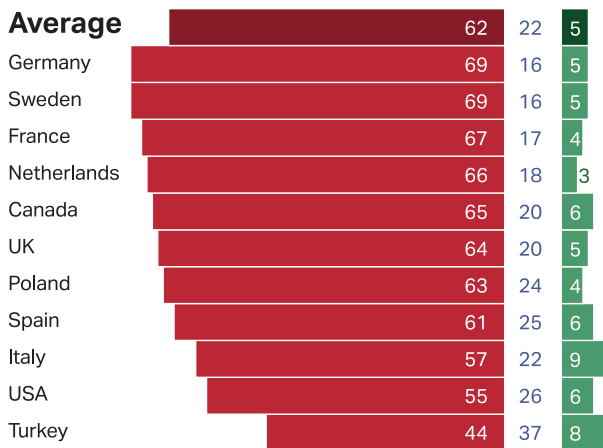
Across policy areas, France scores above average in terms of support for a tougher stance on China. This is most striking on the subject of trade, where 56% of French respondents compared to 39% of respondents across countries—a difference of 17 points—want a tougher stance, followed by climate change (+9 points) and technological innovation (+8 points). Overall, Germans and French are closely aligned on a tougher approach, leading the call in four of the six issues and close behind Americans in also wanting a more robust approach on technological innovation.

TOUGHER/SOFTER TOWARD CHINA

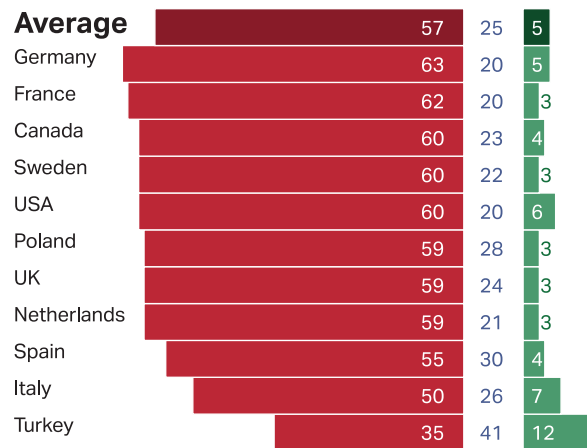
● Tougher ○ Maintain ● Less tough

How do you think your country should approach China regarding the following issues?

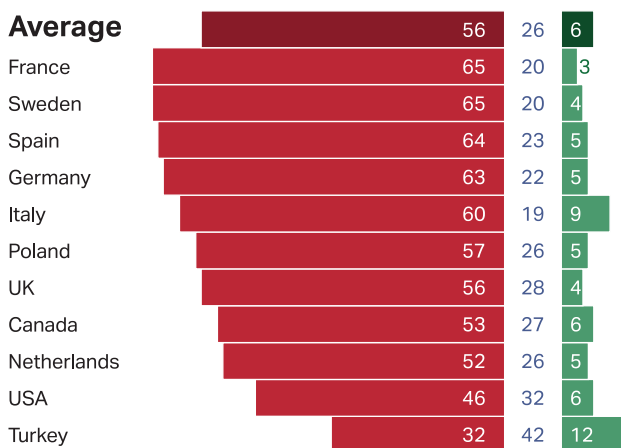
Human rights



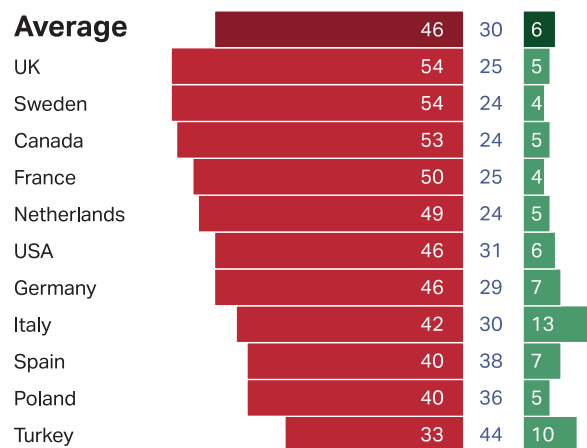
Cybersecurity



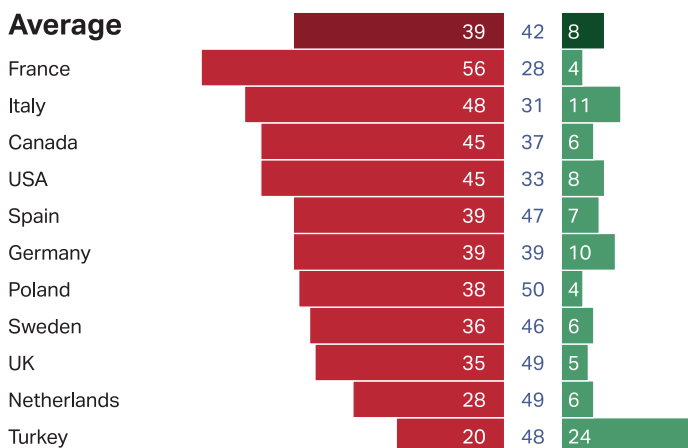
Climate



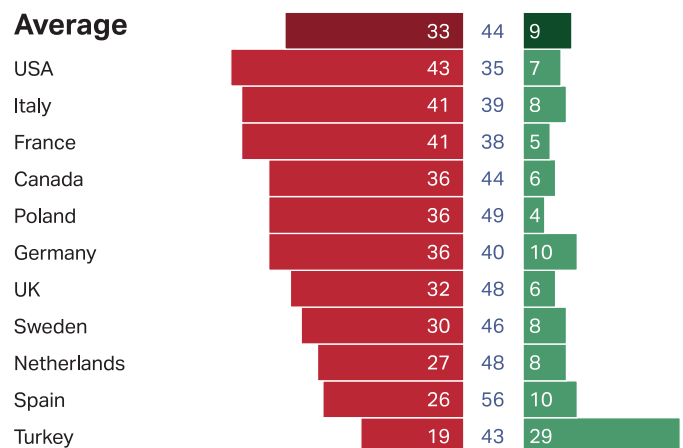
Territorial expansion



Trade



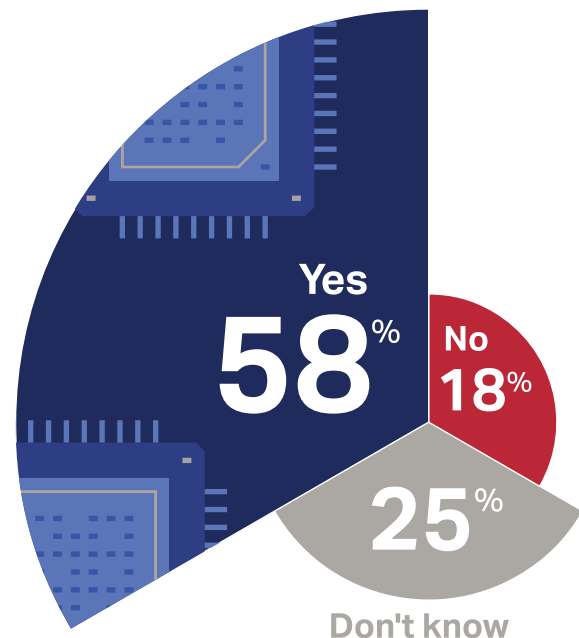
Technological innovation



"Don't know" responses not included in the chart, values ranging from 7-22

IS TRANSATLANTIC TECH COOPERATION AN EFFECTIVE WAY TO COMPETE WITH CHINA?

Closer transatlantic cooperation on technological issues is overall considered an effective way to compete with China in all countries except Turkey, where an overwhelming majority did not have an opinion about this topic.



China has emerged as one of the world's tech champions. Whether the development of high-end IT hardware or digital infrastructure in Europe, Chinese companies—and with them often the Chinese government—are major global players. Though the idea is older than his presidency, President Joe Biden's administration has emphasized the need for democracies to work together to compete with China on tech. Citizens on both sides of the Atlantic seem to agree, with more than two-thirds agreeing that cooperation will help or somewhat help the allies stay competitive. Especially in Spain (67%) and Sweden (66%), respondents deem transatlantic cooperation on technology to be an at least somewhat effective way to compete with China. More than half of respondents everywhere except Turkey think cooperation will help allies compete; in France, Poland, the United States, the UK, and Germany that proportion is 58-62 percent. In Turkey, more than half of respondents did not know how to answer the question.

There is no clear political orientation that can be linked to a favorable view on transatlantic cooperation on technology across countries. Support is higher among Democrat-leaning (68%) than Republican-leaning Americans (58%), and French and Polish respondents aligned with the current governing parties (72% among supporters of La République

en Marche, 76% among supporter of PiS in Poland). In other countries, German Greens (76%), and Italians supporting the right-wing conservative Fratelli d'Italia (64%) are confident that transatlantic cooperation on technological issues is the way to compete with China.

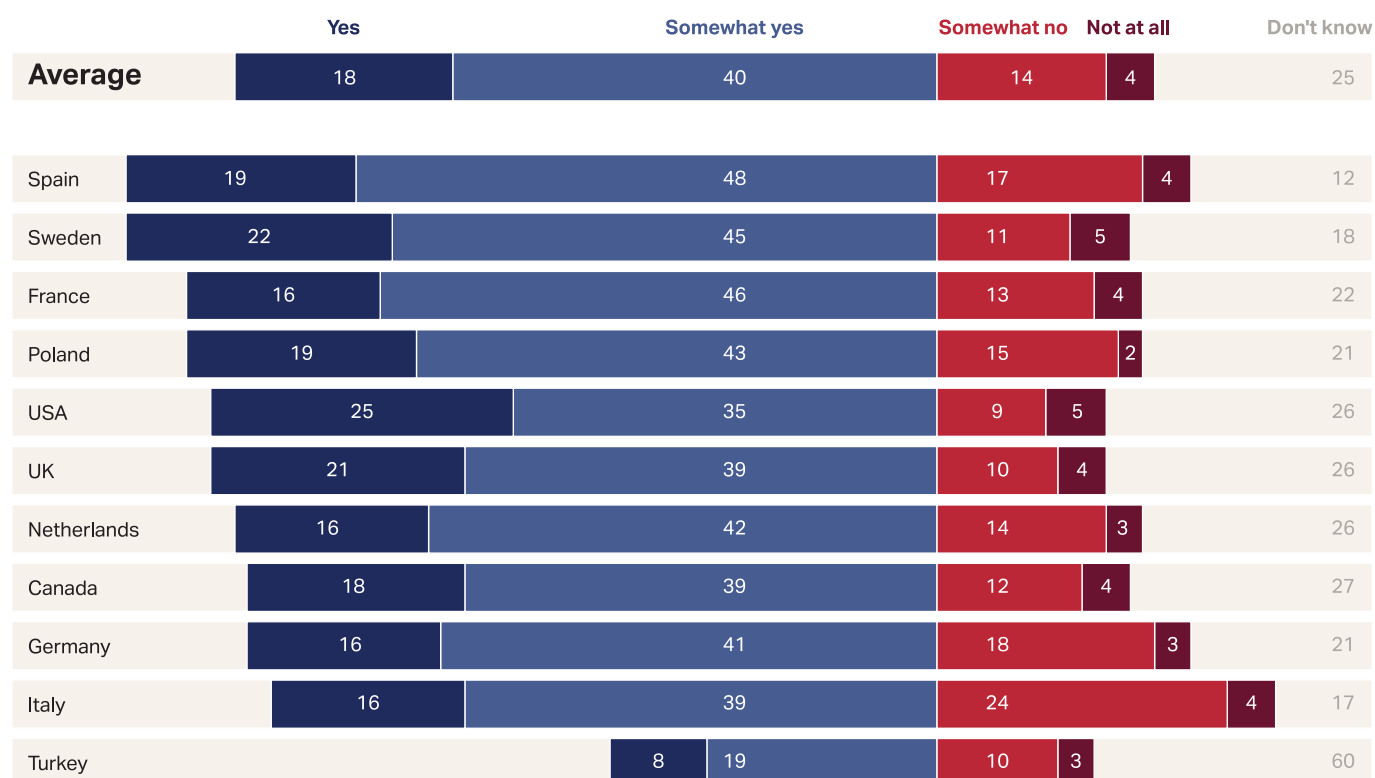
As one of the more specific and complicated questions asked, it is perhaps to be expected that a higher number of respondents do not have an opinion on this question. Roughly one out of four respondents in Canada (27%), the United States, the UK, and the Netherlands (each 26%) say they do not know whether technological cooperation is an effective way to compete with China. "Don't know" responses are particularly high in Turkey (60%), and consistent across age, gender, region, and income. The only exception are respondents who support the governing AKP, of whom 46% compared to 27% of Turks overall—support stronger transatlantic cooperation as an effective way to counter China fully or to some extent. This could align with the results in the United States, France, and Poland, indicating that the supporters of the party in government have been picking up on their leaders' increasing emphasis on the issue of tech cooperation to compete with China.

SPOTLIGHT

Across countries, men are more likely than women to support transatlantic cooperation on technological issues to compete with China. The Dutch have the largest gender gap: While more than two-thirds of all male respondents (70%) think cooperation will be an effective counter, not even half of all female respondents do (46%).

TRANSATLANTIC COOPERATION ON TECH TO COMPETE WITH CHINA

Do you think transatlantic cooperation on technological issues is an effective way to compete with China?





International Trade, Economics, Technology

WHAT IS THE MOST IMPORTANT ECONOMIC PRIORITY?

Reducing poverty is perceived to be the most important economic priority across all countries. Retaining domestic industries or bringing industry back is considered the second most important priority, followed closely by maintaining low levels of unemployment.

During the coronavirus pandemic, economies have suffered from a myriad issues, including varying degrees of unemployment, increased government spending and support, and shuttered businesses. Consistent with the various issues impacting transatlantic economies, overall, not one specific economic priority towers over another. However, the majority of countries on both sides of the Atlantic would put reducing poverty at the top of the list. Reducing taxes nearly makes the top three economic priorities, with Poles and Italians pushing for it the most. Interestingly, despite shortcomings in countries related to public services, whether in the form of public health or voting, developing and strengthening such services is the second lowest priority of all countries surveyed. Finally, despite French, German, and American respondents pushing for increased taxes on big tech companies in the 2020 survey, overall, taxing big companies is among the lowest economic priorities of respondents in all three countries.

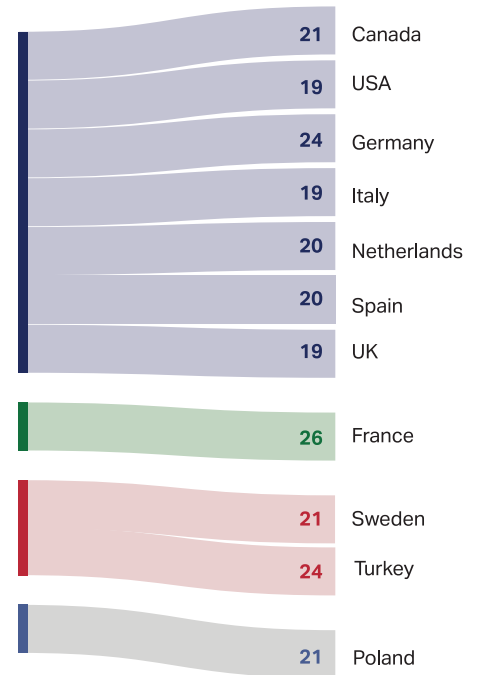
In seven of the 11 countries surveyed, respondents selected reducing poverty as the most important economic priority (19% composite average), with the highest support among Germans (24%). Keeping industries in-country is

Reducing poverty

Keeping industries in country/bring them back

Keeping unemployment low

Reducing taxes



considered the second most important economic issue (15% overall), including for over a quarter of the French (26%). Nearly the same share of respondents are focused on keeping unemployment low (14%) and reducing taxes (13%). Turks (24%) and Swedes (21%) are more focused on keeping unemployment low, while more Italians (19%) and Poles (21%) support reducing taxes.

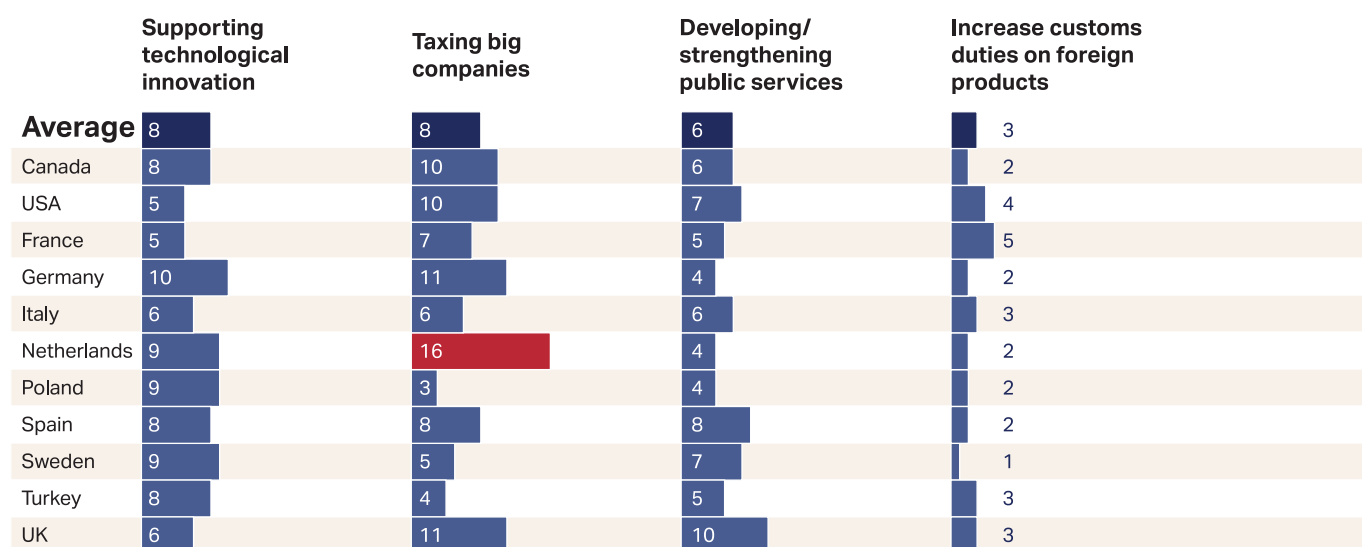
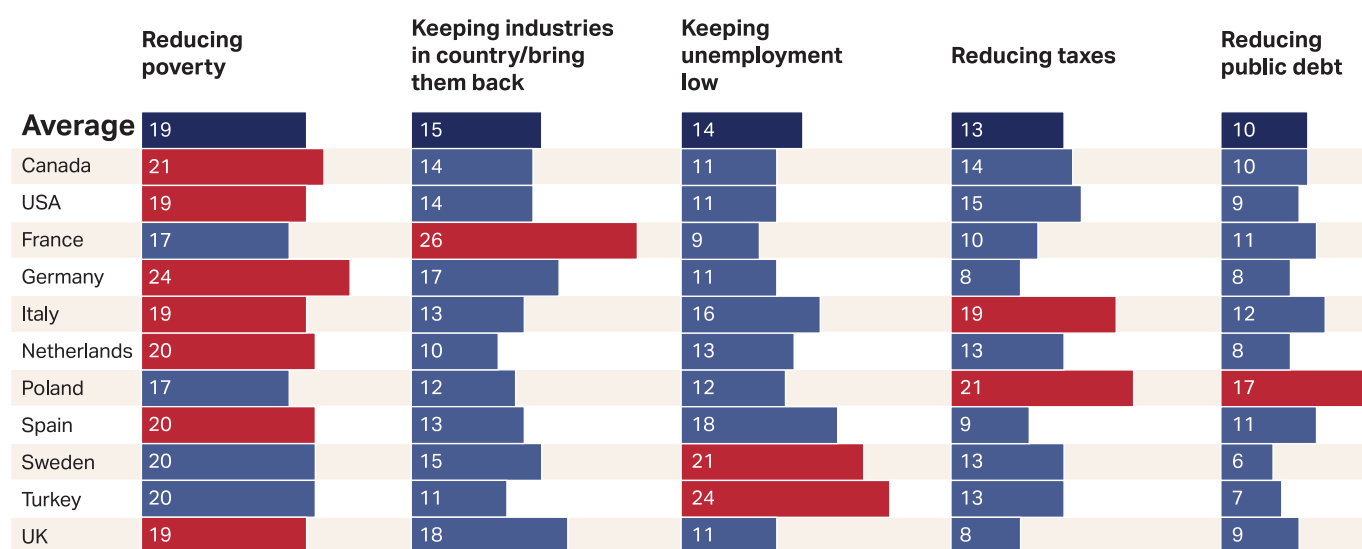
Across most countries surveyed, the respondents in the oldest age brackets prioritize keeping industries in-country or bringing them back, while the youngest respondents are pushing to reduce poverty. For example, respondents age 55+ in the United States (26%), and 65+ in the United Kingdom (30%), Germany (23%), and France (33%) want to protect or revitalize industries, while the youngest American (28%), British (29%), German (34%), and French (27%) respondents would like to reduce poverty. In most countries, political divides appear as well. Right-leaning parties are more likely to push for decreasing taxes and reducing debt, while left-leaning parties are more likely to push for reducing poverty. For example, in the U.S., Democrats are more likely to choose reducing poverty (23%) while Republicans are more likely to choose reducing taxes (21%) or keeping industries in-country (20%).

SPOTLIGHT

While the reshoring of industries ranks high on the agenda of French respondents, there is an important generational gap: One-third of the respondents older than 55 years (33%) share this view, whereas this is the case for only 11% of 18-24 year-olds and 14% of 25-39 year-olds, which thereby still score below the cross-country average (15%).

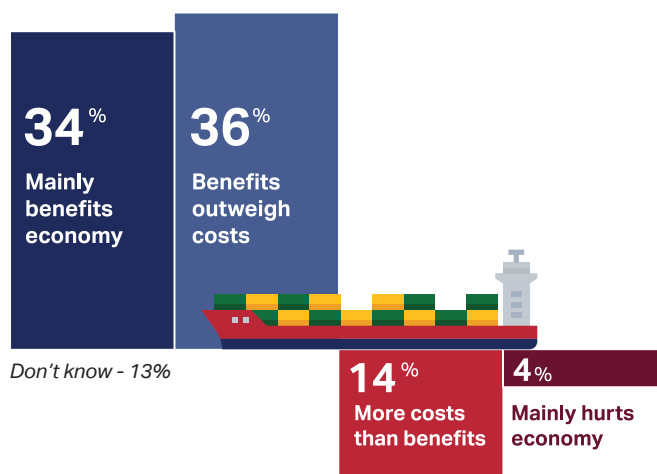
MOST IMPORTANT ECONOMIC PRIORITY (top ranked)

Among the following economic priorities, which are the three most important priorities according to you?



DOES TRADE BENEFIT YOUR ECONOMY?

The majority of respondents in the countries surveyed find international trade beneficial. The positive views are nearly split equally between those perceiving trade as mainly beneficial and at least more beneficial than not.



Trade was one of the main activities disrupted by the coronavirus pandemic. Broken supply chains, travel restrictions, and vaccine nationalism resulted in trade in services and merchandise dropping to the lowest levels in the past three decades. However, the majority of respondents in all 11 countries view international trade as rather or fully beneficial, particularly in Sweden (79%), Poland (78%), and the Netherlands (77%). Interestingly, the United States, the largest of the economies included in the survey, has, on average, lower favorable views of international trade (63%), including a countrywide high of 18% of respondents who are unsure. Of all countries, France displays the least favorable views, with one-third of respondents saying that trade disadvantages their country (32%).

On average, 70% of respondents in all 11 countries believe international trade benefits their respective economies, split nearly equally between rather benefits (36%) and mainly benefits (34%). 79% of Swedes, 78% of Poles, and 77% of the Dutch believe international trade is beneficial. Britons (73%), Canadians (73%), and Germans (72%) have nearly as high appraisals. The French, however, have an outlier view from the countries surveyed, with only a small majority (54%) believing international trade is beneficial to the French economy.

Upon deeper analysis, a particularly noticeable gender divide appears in most countries. Male respondents are more likely to find international trade beneficial than female respondents. Some of the largest disparities are visible in Sweden (88% of males vs. 71% of females, a 17-point difference) and Canada (81% of men vs. 65% of females, a 16-point difference). Similarly, across most countries, older respondents are more likely to indicate that they find trade beneficial than younger respondents, with the most striking difference appearing in the UK (85% of 65-year-and-older respondents vs. 59% of 18-24-year-olds, a 26-point difference), but this trend is also confirmed in Canada (78% vs. 70%), Germany (83% vs. 69%), Turkey (66% for the 55+ vs. 51%), and Poland (88% vs. 78%).

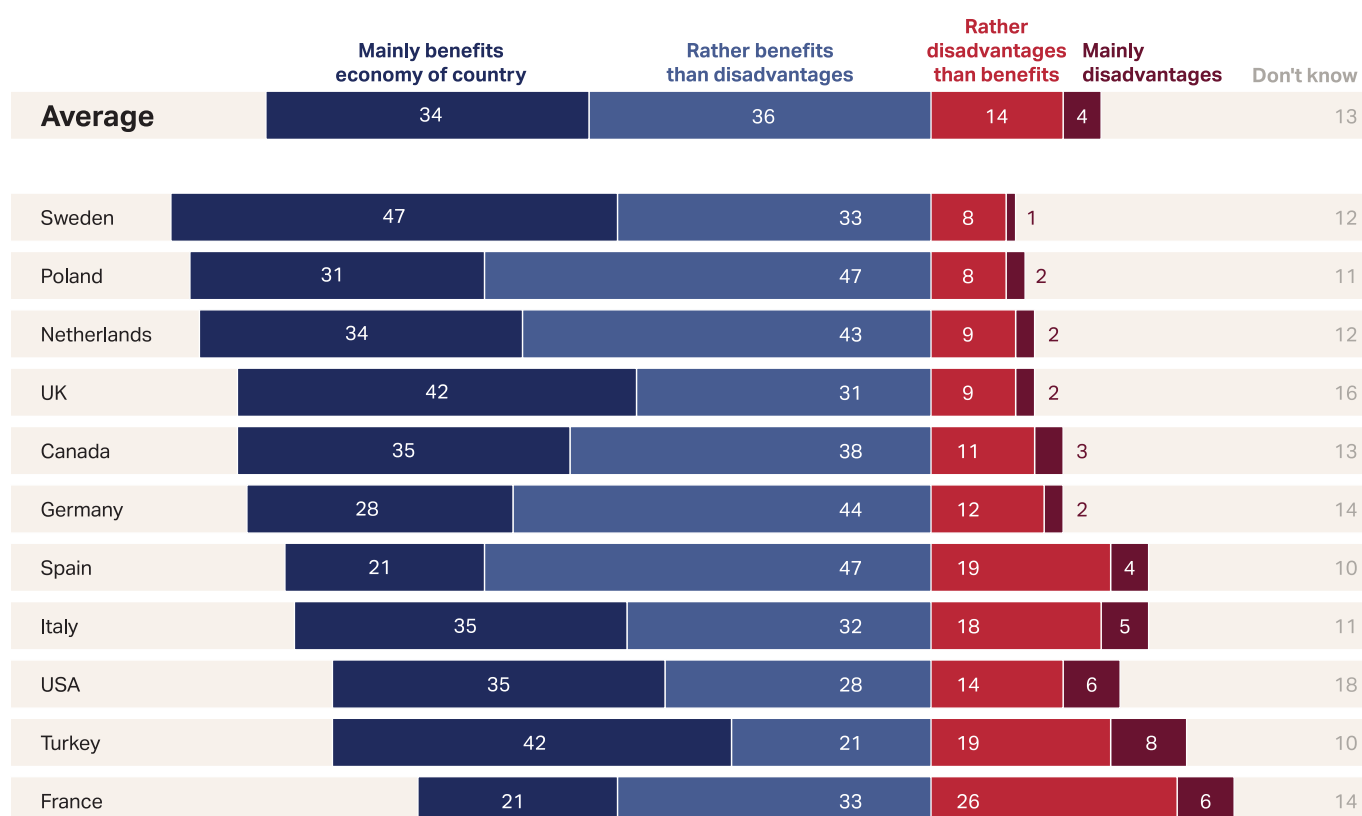
Political divisions along party lines are also evident, including in Turkey, (79% of AKP respondents vs. 56% of CHP respondents), the United States (73% of Democrats vs. 57% of Republicans), and Germany (86% of Green and SPD voters vs. only 55% of AfD voters). Furthermore, higher earners and more educated respondents are more likely to find international trade beneficial than lower earners and those of lower educational backgrounds. The most notable case is Italy, where 86% of highly educated and 74% of higher earners find international trade beneficial compared with 57% of respondents with lower educational backgrounds (a 27-point difference) and 58% of lower earners (a 16-point difference).

SPOTLIGHT

In France, where positive views of international trade are the lowest, a surprising reversal of the generational gap appears. Instead of older French respondents viewing trade more favorably than younger respondents, only 50% of respondents 65 and older find trade beneficial compared with 63% of those ages 25-39.

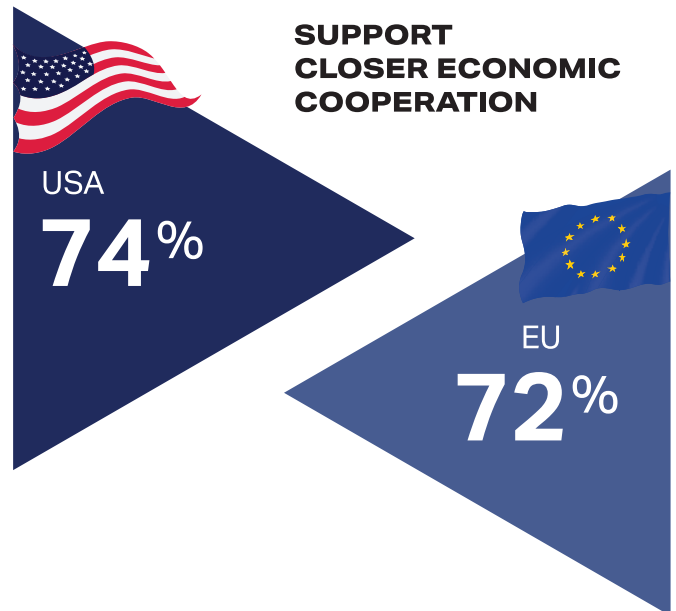
OPINION ON INTERNATIONAL TRADE

Do you think that international trade...?



DO YOU SUPPORT CLOSER TRANSATLANTIC ECONOMIC COOPERATION?

A large majority of all respondents support closer transatlantic economic cooperation. Nearly a quarter of all respondents strongly support it.



The United States and the European Union are each other's largest trading partners, but the past few years have been dominated by trade tensions—even before the pandemic created new tensions. Despite German-American cooperation in creating one of the first COVID-19 vaccines, vaccine nationalism has subsequently dominated discussions over the challenges impacting transatlantic economic relations. However, it seems these trade tensions have not soured public interest in increased engagement. Calls for closer economic cooperation are overwhelmingly positive in all EU countries surveyed, as well as the two non-EU member states, Turkey and the United Kingdom. Furthermore, consistent with the 2020 survey results asking French, German, and American respondents how they felt about a transatlantic trade agreement, all parties are still in favor of closer economic cooperation, with the French supportive, but slightly less enthusiastic.

Of the countries surveyed, nearly three-quarters of all respondents would like closer economic cooperation (74% average). The highest figures are seen in Spain (85%), Poland (80%), and Italy (75%). Country averages for overall support remain above 70%, except for Turkey (66%), and notably France (62%), where "I don't know" answers are also highest (20%).

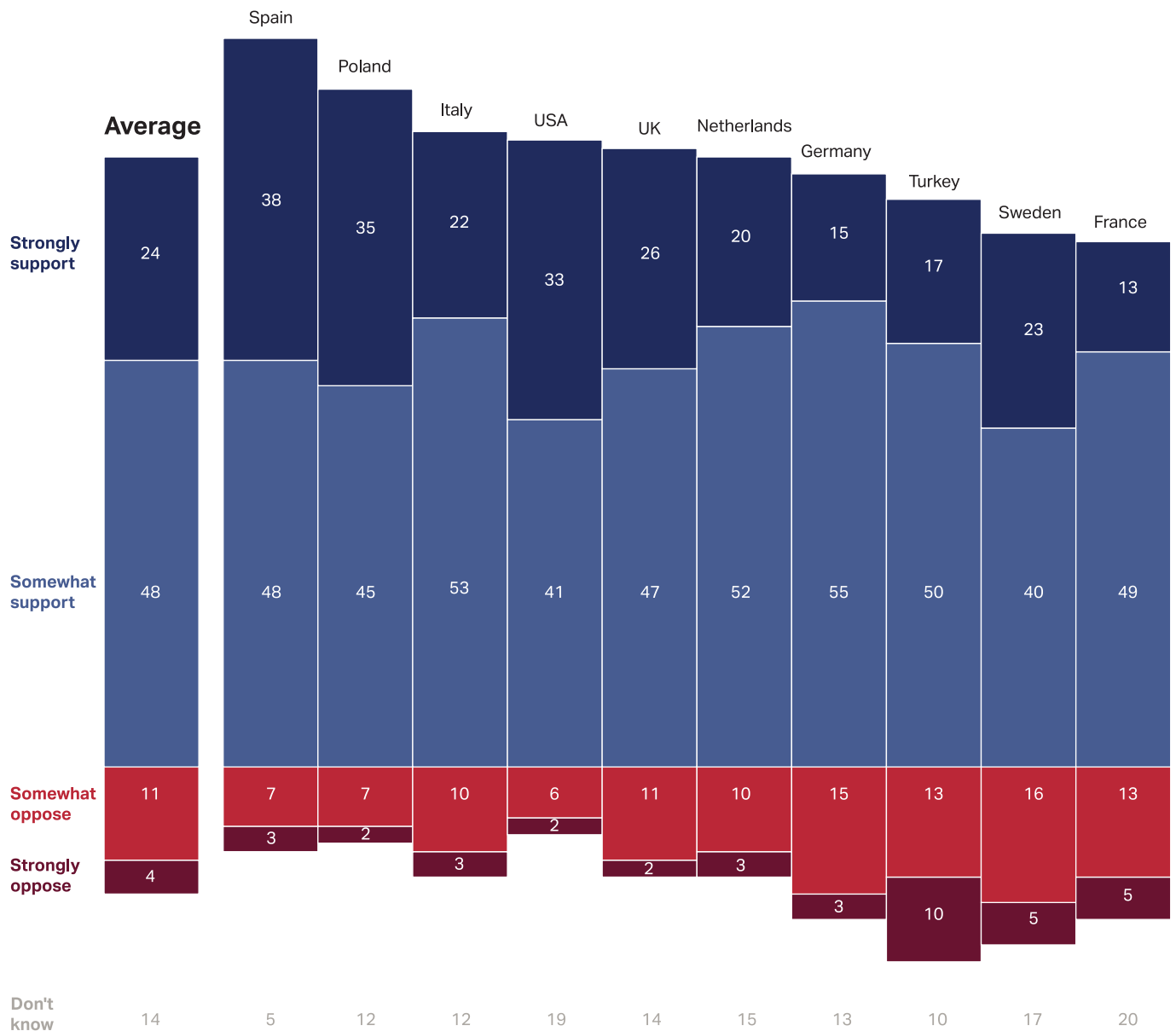
Similar to survey participants' views of international trade, major divergences surface according to gender, age, education, income, and political affiliation. Older respondents are more likely to want closer transatlantic economic cooperation than younger respondents, with the most prominent gap surfacing in the UK (82% of respondents 65 and older vs. 58% of 18-24 year-olds, a 26-point difference). More educated respondents view transatlantic economic ties more favorably than the less educated, as seen in the U.S. (85% vs. 59%) and Italy (86% vs. 69%). Respondents with higher incomes support closer economic cooperation between the U.S. and Europe more than those of lower earners, with the most striking gap surfacing in France (81% vs. 57%). The most prominent gender differences appear in Sweden, where 76% of males have favorable views versus less than a majority of females (48%), a 28-point difference. Similar divides surface in the U.S., UK, Germany, and Italy. Political divides also surface, as seen in the U.S., where 83% of Democrats support closer economic ties with Europe versus 70% of Republicans.

SPOTLIGHT

While more than four out of five respondents in Spain are in favor of closer economic cooperation with the United States (85%), these values peak among certain groups: Almost all (94%) respondents leaning toward the Christian-democratic conservative Partido Popular and nine of out ten respondents in the group with a higher income (91%) support closer economic cooperation.

SUPPORT FOR CLOSER ECONOMIC COOPERATION FOR U.S.-EU/YOUR COUNTRY

To what extent do you support or oppose closer economic cooperation between the EU and the United States (for non EU states. U.S. and your country?)



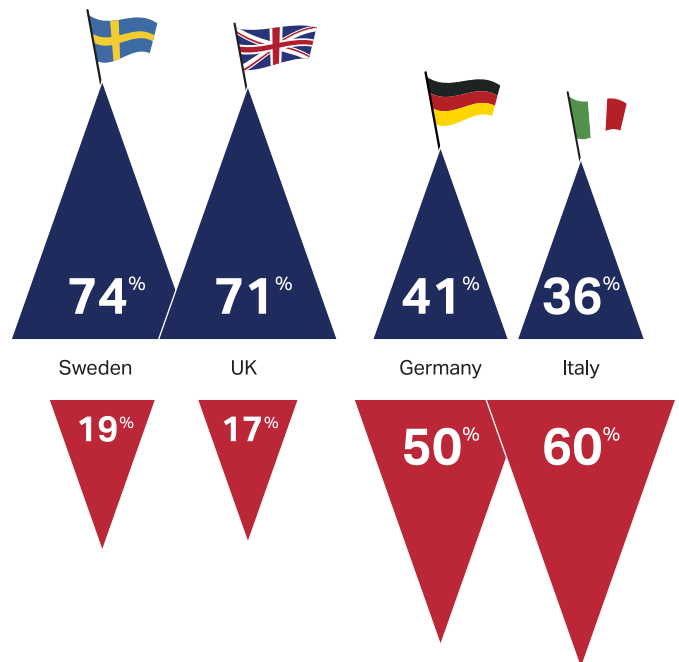
IS YOUR COUNTRY KEEPING PACE WITH TECHNOLOGICAL DEVELOPMENTS AND INNOVATIONS?

A plurality of respondents in nine of 11 countries are somewhat confident that their country is keeping pace with technological developments. Germans and Italians, however, are almost split on the issue, but lean toward a pessimistic view.

The coronavirus pandemic has forced governments, businesses, schools, and individuals to quickly transition to a much more virtual world. In the challenge to adapt, most respondents believe their country is tackling technological developments and innovations somewhat well, while over a quarter of respondents in the United States, Turkey, and Sweden give their country highest marks. Conversely, the majority of German and Italian respondents are displeased with their respective countries' performances. Consistent with the 2020 survey, which asked Germans to rate the degree to which their government was helping citizens adapt to the impact of digital technologies in the workplace, Germans remain largely unsatisfied. Views in other corners of Europe are nearly split down the middle.

Across all countries surveyed, on average 58% believe they are keeping pace. The highest positive views are in Sweden (74%), the United Kingdom (71%), and the United States (69%). Two-thirds of Dutch, Canadians, and Turks also appear largely satisfied. The lowest estimations of tech capacity are in Germany and Italy, where 50% and 60% think their country is falling behind. The French, Spaniards, and Poles appear to be nearly split on the matter, with a slight plurality in France and Poland and a slight majority in Spain at least somewhat confident that they are keeping pace (47% vs. 44% in France, 52% vs. 46% in Spain, 47% vs. 45% in Poland).

▲ MOST ON PACE / MOST FALLING BEHIND ▼



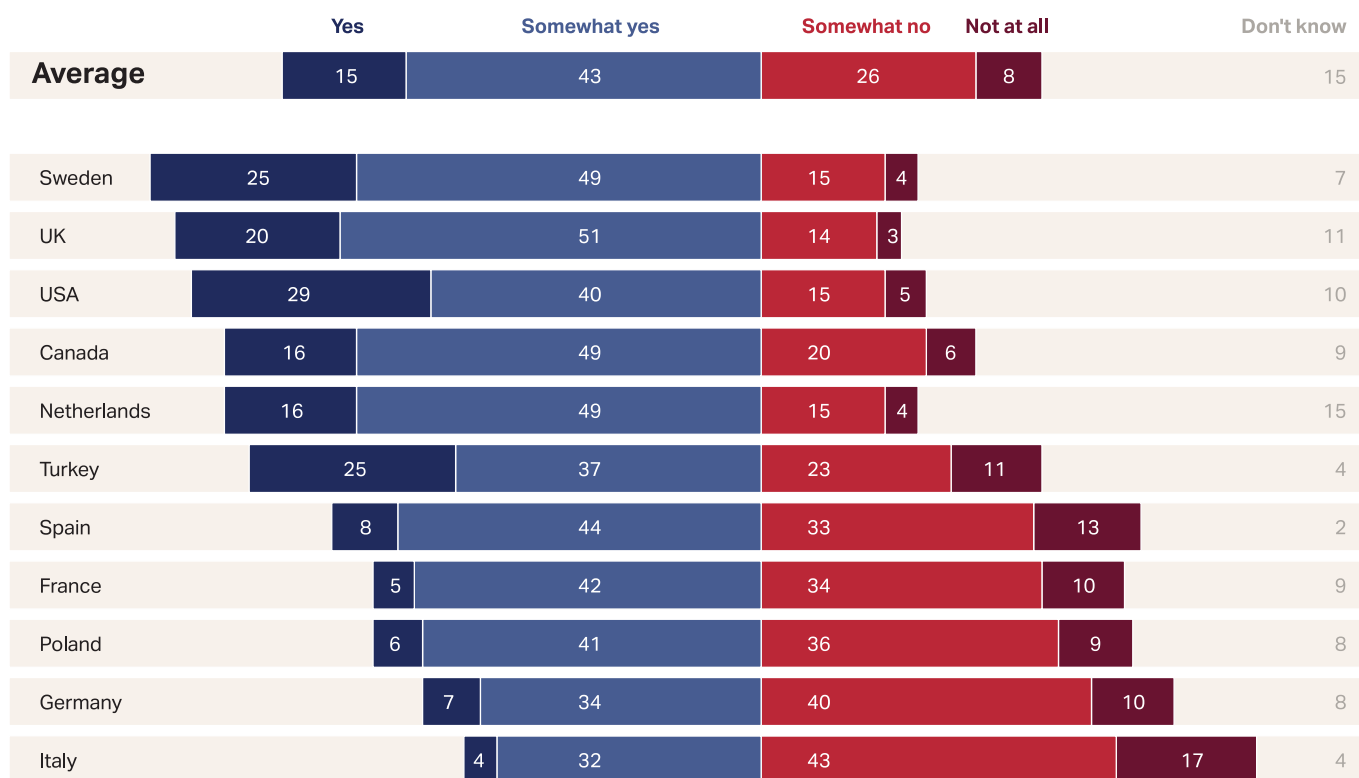
In many countries, a generational and socioeconomic divide can be seen. In the United States and the UK, older respondents are more satisfied with their country's tech pace than the youngest respondents in both countries (72% of 55+ in the U.S. and 80% of 65+ in the UK vs. 61% and 56% of respondents under 25, respectively). However, in Germany, older respondents are less satisfied than younger respondents, specifically 49% of Germans 65 and older think their country is lagging, compared with just 32% of 18-24 year-olds. Among Americans, the gap between socioeconomic status is particularly wide, with 86% of middle-upper class respondents indicating approval versus 57% of the lowest earners, a 29-point difference. In France, respondents in the highest income group are most confident that the country is keeping up—14%, almost three times as high as the French average answering "yes" at 5%.

SPOTLIGHT

There are major political differences in Turkey, Italy, and Canada regarding tech confidence. In Turkey, 84% of AKP voters think that their country is keeping pace with technological developments, compared with 49% of CHP voters, a 35-point difference. In Italy, 67% of Lega voters are satisfied vs. 28% of Five Star voters, a 39-point difference; and in Canada, 81% of Liberal voters are satisfied while 59% of Conservative voters think the country is not keeping up.

CAPACITY OF COUNTRY TO KEEP PACE WITH TECHNOLOGICAL DEVELOPMENTS

Do you think your country is keeping pace with technological developments and innovations?





Global Challenges

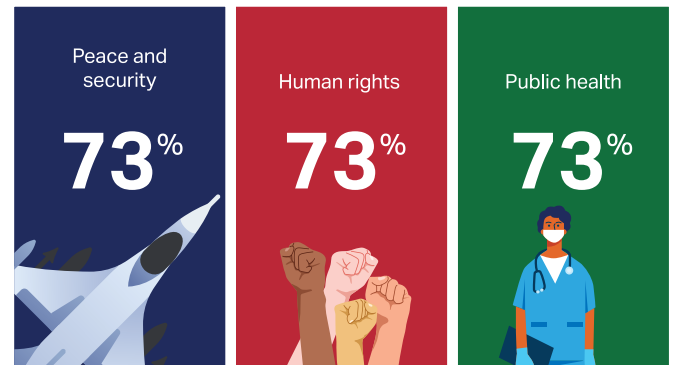
SHOULD THE UNITED NATIONS DO MORE?

Respondents from all countries want the United Nations (UN) to be much more active in addressing global challenges, from peace and security to humanitarian aid and regulating cyberspace.

Transatlantic partners have regularly reaffirmed their commitment to multilateralism, and the Biden administration has been outspoken about its intention to reinvest in multilateral organizations. At the same time, the UN has been increasingly affected by the growing tensions among great powers. These tensions, however, seem not to have turned transatlantic opinion against the UN. Instead respondents are in favor of a more active UN in all the fields considered, and widely reject the idea that the UN should be less involved in any of these issues. Beyond the general support, the results also show a clear public prioritization of four issues: climate change, human rights, public health, and peace and security.

More than half of the population in all 11 countries think that the UN should either do somewhat or much more in all areas, with slightly lower numbers regarding the regulation of cyberspace. Two countries in particular are most enthusiastic: Turkish and Italian respondents consistently believe that the UN should “do much more” in all fields, by a large margin. The Spanish respondents are similarly pro-UN. In all three countries, people are especially engaged on the question of the protection of refugees and humanitarian aid, with nearly half of respondents wanting the UN to do much more. Their specific experiences as border countries

DO MORE FOR...



receiving high numbers of refugees in the past decade can explain this priority. In most countries, older generations are more likely to favor a much more active UN than the younger respondents, particularly in the fields of peace and security and human rights.

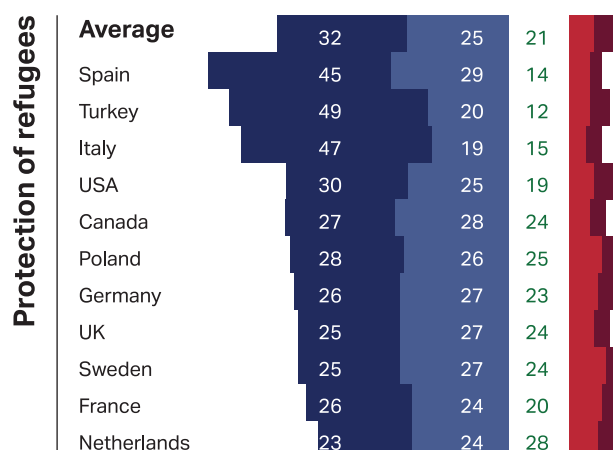
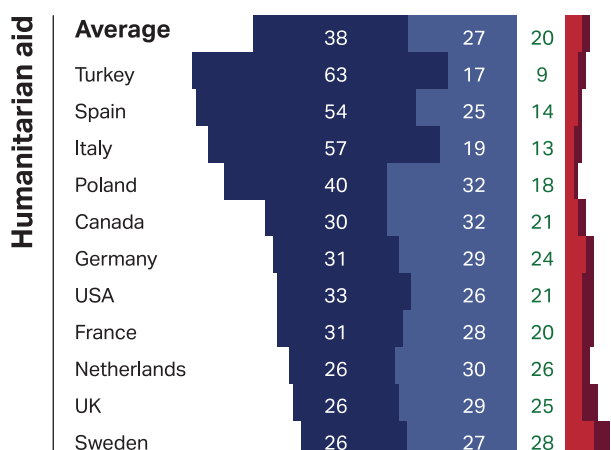
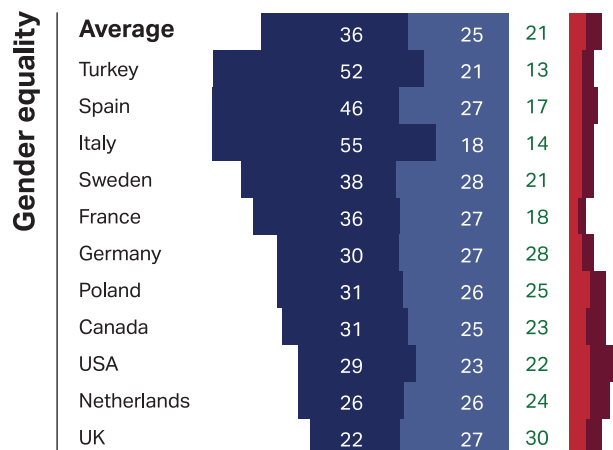
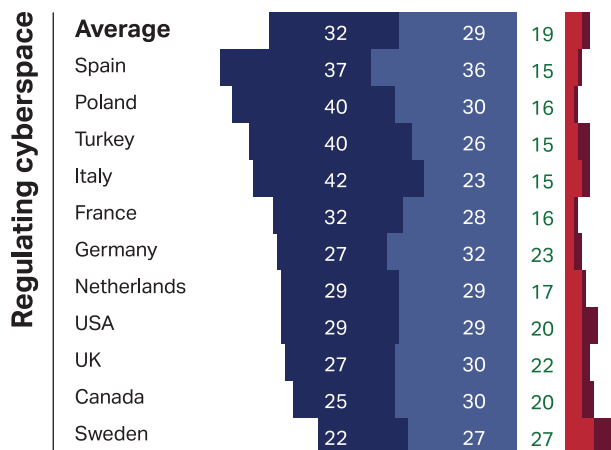
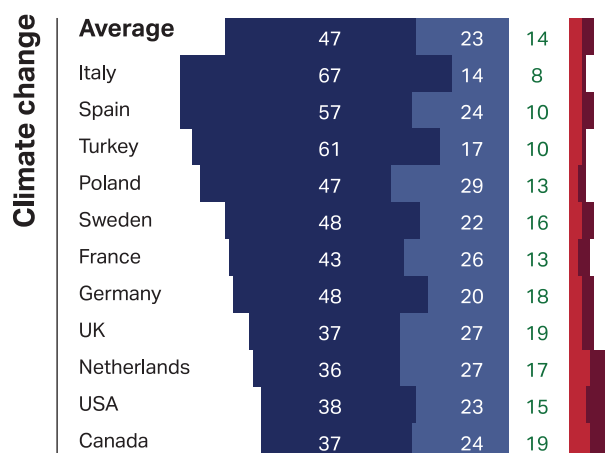
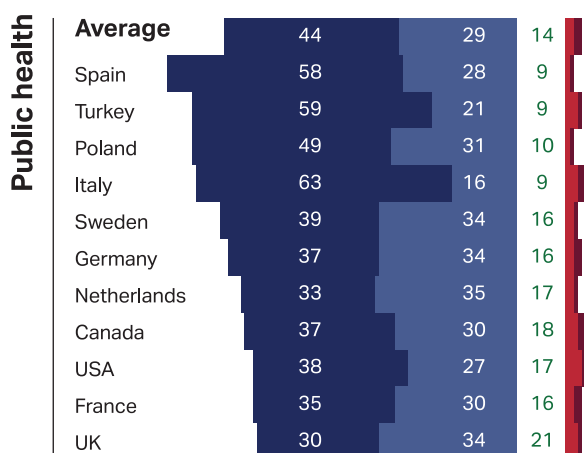
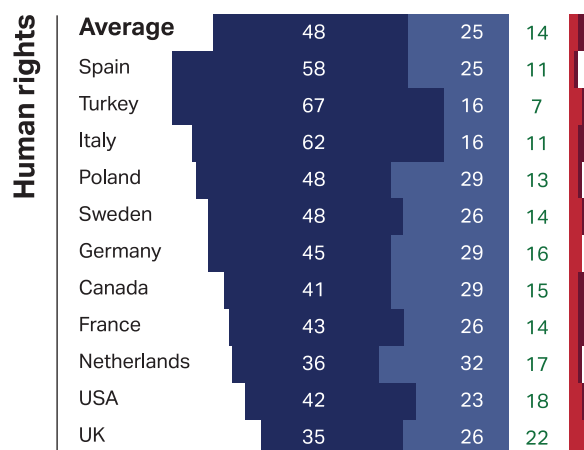
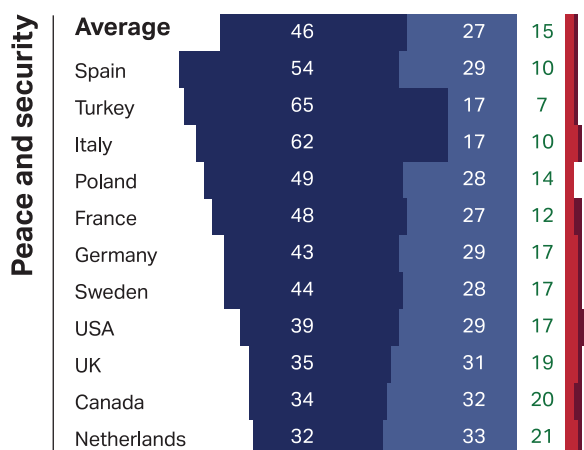
Interestingly, the three countries that are permanent members of the UN Security Council (France, the UK, and the United States) are also those with the population most likely to answer that they do not know. Between 10% and 20% of the American, British, and French respondents felt like they could not answer the questions, depending on the issue.

SPOTLIGHT

More than two-thirds (67%) of Turks believe that the UN should be much more active on human rights issues. This is the strongest country response overall, tied with Italians support for much more action on climate change.

WHAT DO YOU THINK ABOUT THE UNITED NATIONS' ACTION IN THE FOLLOWING FIELDS?

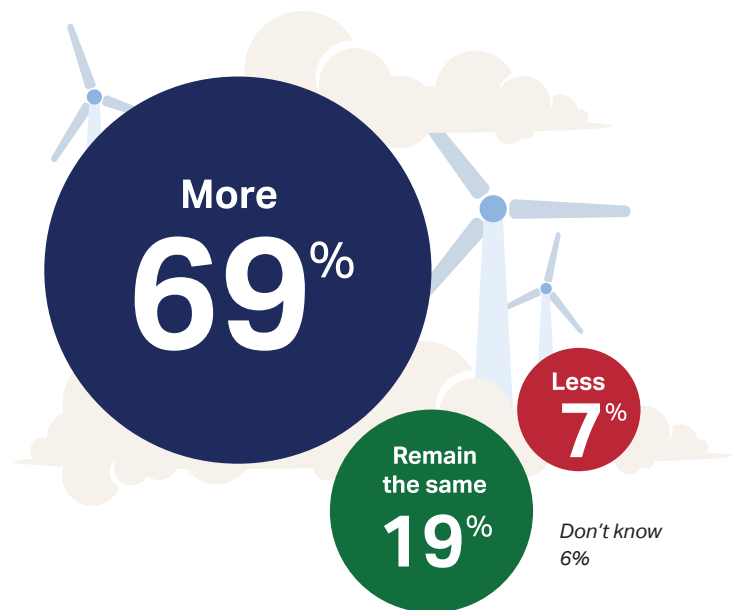
● Much more ● Somewhat more ○ Remain the same ● Somewhat less ● Much less



"Don't know" responses not included in the chart, values ranging from 3-20

SHOULD YOUR COUNTRY DO MORE OR LESS TO ADDRESS GLOBAL WARMING?

The vast majority of respondents believe their countries should do somewhat or much more to combat climate change. In seven of the surveyed countries, more respondents want their country to do much more.



Consistent with the perceptions of the most pressing challenges requiring transatlantic action, the vast majority of respondents believe their country should do more to combat climate change (69% overall average). In recent years, environmentalist movements have gained increased traction on both sides of the Atlantic, from the Fridays for Future movement in Europe to the Green New Deal in the United States. Most countries believe their governments should do much more, while the remaining countries' respondents believe they should do somewhat more.

Of all respondents surveyed, 68% indicate that their governments should be doing more, of which a clear plurality of 40% are calling for much more action. Appeals for increased action are the highest in Turkey (83%), Italy (81%), and Spain (81%). 70% of Italians are pushing for much more climate action from their government. The lowest calls for increased action come from the Netherlands (53%) and Sweden (59%). Around a quarter of the respondents in the Netherlands (28%), Sweden (25%), Germany, Canada, and the UK (each 24%) are satisfied with their country's policies to tackle climate change, although the majority of respondents in these countries still think that their government should do more or much more to address this issue.

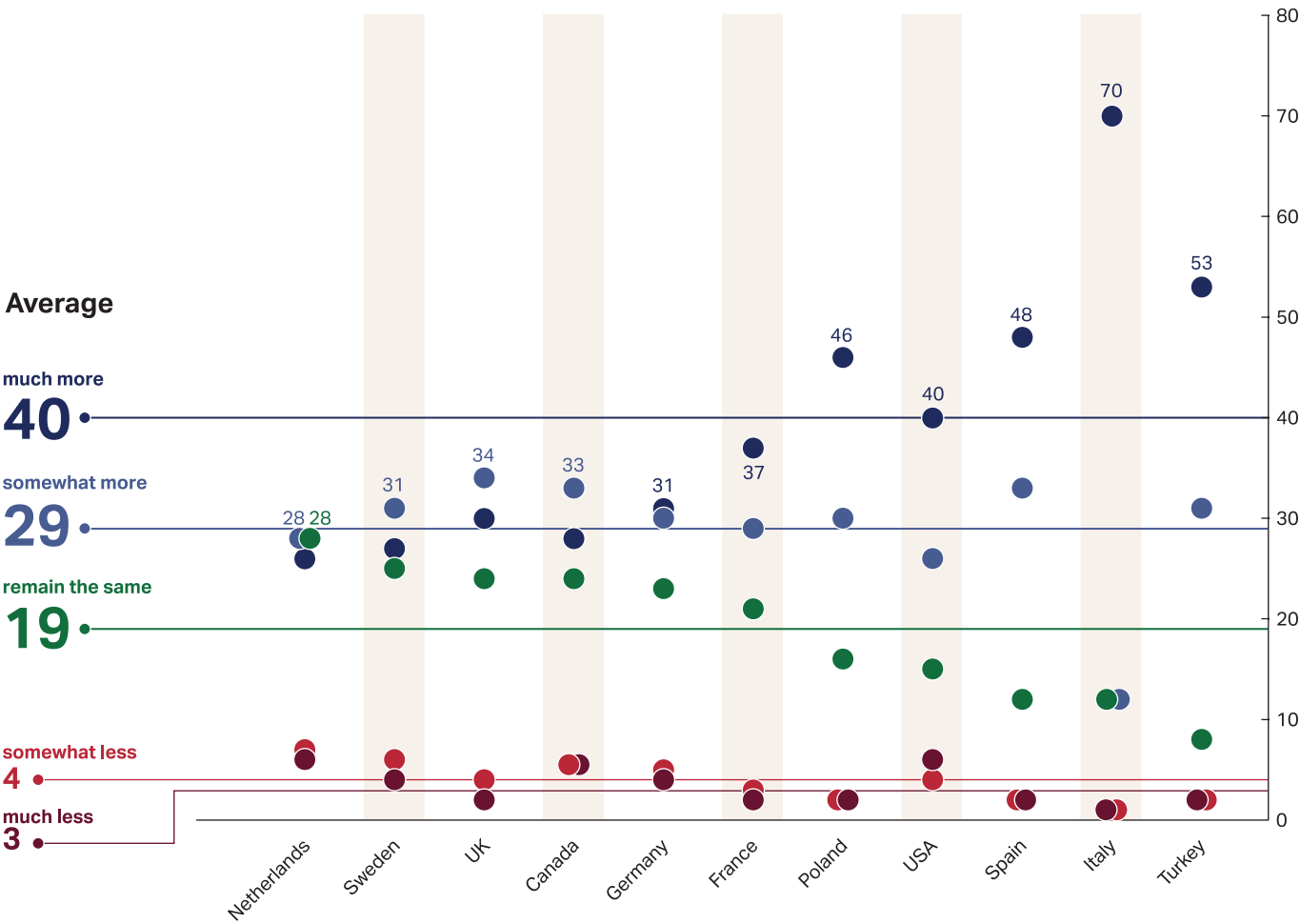
Upon closer examination, a political divide appears across most countries. Generally, liberal parties would like increased action over conservative and especially far-right parties. Particularly notable divides are visible in the U.S. (83% of Democrats vs. 45% of Republicans), and Turkey (65% of CHP supporters vs. 41% of AKP ones). The most striking differences, however, are visible in Germany, where 88% of Green respondents would like increased overall action, compared with just 31% of AfD respondents. Furthermore, more AfD respondents prefer decreased overall action than maintaining current policies (34% vs. 28%).

SPOTLIGHT

In Turkey, which already has the highest share of people in favor of more action on climate change (83%), the likeliness to support more action increases with age: while three out of four respondents (74%) aged between 18 and 24 share this opinion, more than nine out of ten (92%) respondents older than 55 demand stronger action to tackle climate change.

ACTION ON CLIMATE CHANGE

With regard to climate change and efforts to address global warming, do you feel your country should do...?



"Don't know" responses not included in the chart, values ranging from 3-8

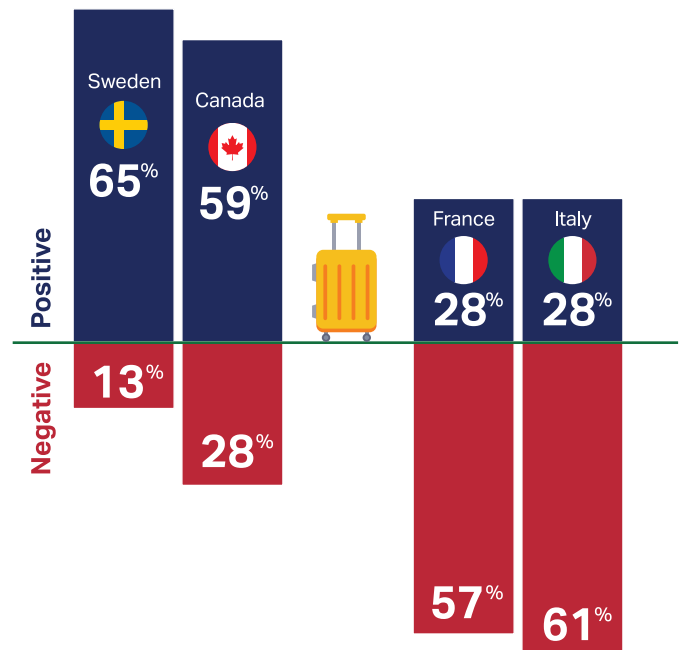
IS MIGRATION POSITIVE OR NEGATIVE FOR YOUR COUNTRY?

French, Italians, and Dutch have an overall negative view of migration, while in all other countries a more positive view of migration prevails. Overall, a negative opinion on migration is clearly correlated with right-wing political affiliation.

Migration is a contested issue among the public on both sides of the Atlantic and shows an important divide in public opinion across countries. While roughly two-thirds of Swedes (65%) and three out of five Canadians (59%) think that migration is very positive or more positive than negative for their country, almost the same share of Italian (61%), French (57%), and Dutch (55%) respondents regard migration as very negative or more negative than positive for their country. An overall positive assessment of migration prevails in the U.S. (47% positive to 37% negative), the UK (51% positive to 36% negative), and Canada (59% positive to 28% negative).

While migration is considered very negative or more negative than positive by two out of five respondents (40%) across all countries on average, the percentage of respondents sharing this view is significantly lower in Sweden (12%) and Turkey (16%). Interestingly, the majority of Turks (58%) are undecided whether migration is negative or positive for their country.

Respondents leaning toward conservative or parties farther right on the political spectrum have a very negative



assessment of migration. Compared across countries, this is most striking in Germany, where four out of five (82%) of respondents aligned with the far-right AfD think that migration is overall negative, whereas less than half of all German respondents (46%) share this view. Thus, a AfD-leaning respondent is almost twice as likely to have a negative opinion of migration than the average German respondent. Similar patterns apply to Spanish supporters of the far-right VOX party (75% negative vs. 47% national average) and Dutch respondents supporting the right-wing parties PVV (78% compared to a national average of 55%). Interestingly, the French respondents leaning toward the center-right Les Républicains (84%) have even a slightly more negative opinion than respondents of the far-right Rassemblement National (82%), but both are about 25 points above the national average (57%).

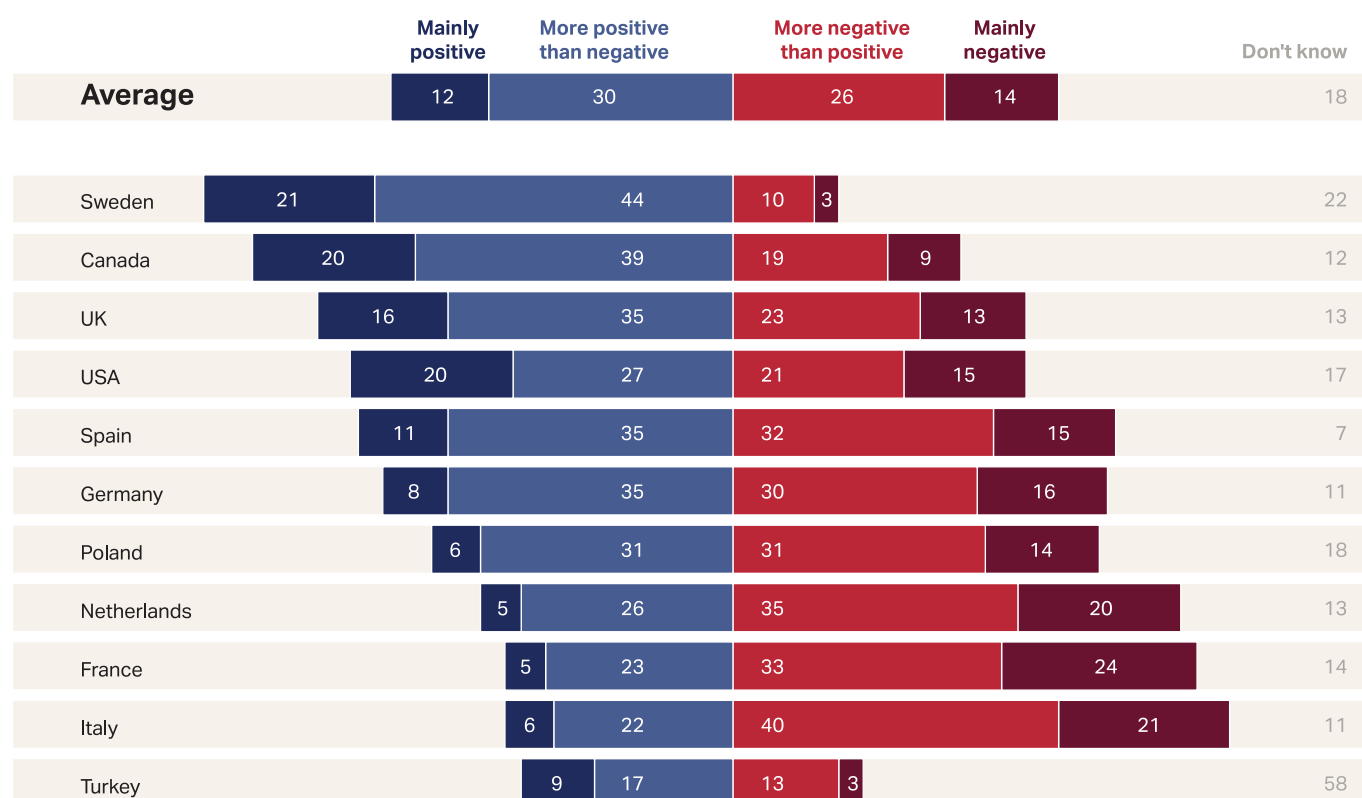
In countries where a positive view on migration prevails overall, conservatives view migration more negatively: This is the case for 55% of Republican-leaning Americans, compared to the 37% average, and 47% of the respondents leaning toward the Conservative party in Canada, compared to only 29% of Canadians on average.

SPOTLIGHT

Sweden shows an important generational and gender gap on migration. Men are twice as likely to consider migration as “mainly positive” than women (28% compared to 14%), and the proportion of 18-24 year-olds with a negative view of migration (33%) is six times higher than the their compatriots 55 and older (5%).

VIEW ON MIGRATION

Do you think migration is positive or negative for your country?

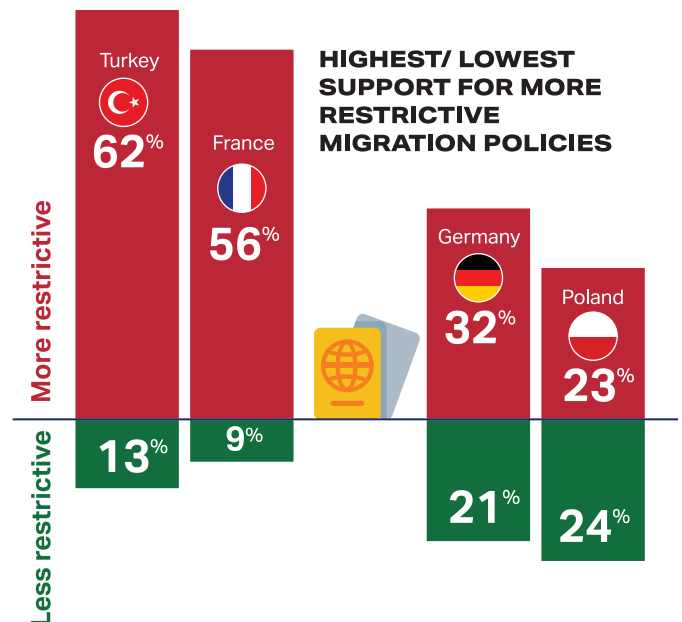


SHOULD YOUR COUNTRY'S POLICIES TOWARD MIGRATION BE MORE OR LESS RESTRICTIVE?

A majority of the respondents support more restrictive policies toward migration, with the exception of Poland, Germany, and Canada.

Several years after an unprecedented migration crisis in modern Europe, reflections on migration, integration, and identity still play a key role particularly in European countries, albeit recently overshadowed by the coronavirus pandemic. Nevertheless, there is not necessarily a correlation between the challenges related to migration that countries have been facing in the last years and public opinion. Respondents in Turkey (60%), France (56%), and Italy (54%) show the strongest support for more restrictive policies, but are on almost the same level as the Netherlands (55%) and Sweden (54%). In Canada (46%) and Poland (37%), a majority is in favor of maintaining their countries' current approach on migration, whereas public opinion in Germany is balanced between maintaining existing policies or adopting more restrictive ones (each 32%). The opinion of respondents on their country's attitude toward migration policies does not necessarily depend on their opinion about migration. A majority in France and Italy support more restrictive policies, and this is also the case for Swedes (55%) and Turks (62%); however, compared to France and Italy, an overall negative image on migration does not prevail in Sweden and Turkey (see question 21).

Similar to the general assessment of migration (question 21), the views on policies toward migration strongly vary with political affiliation; supporters of conservative, center-right, or far-right parties are generally supportive of more restrictive policies. Interestingly, respondents with the highest income level show above-average support for more restrictive policies in some countries: This gap is



particularly striking in France (76% compared to the 56% national average), but is also significant in Turkey (72% compared to 62%) and in the U.S. (48% compared to 42%).

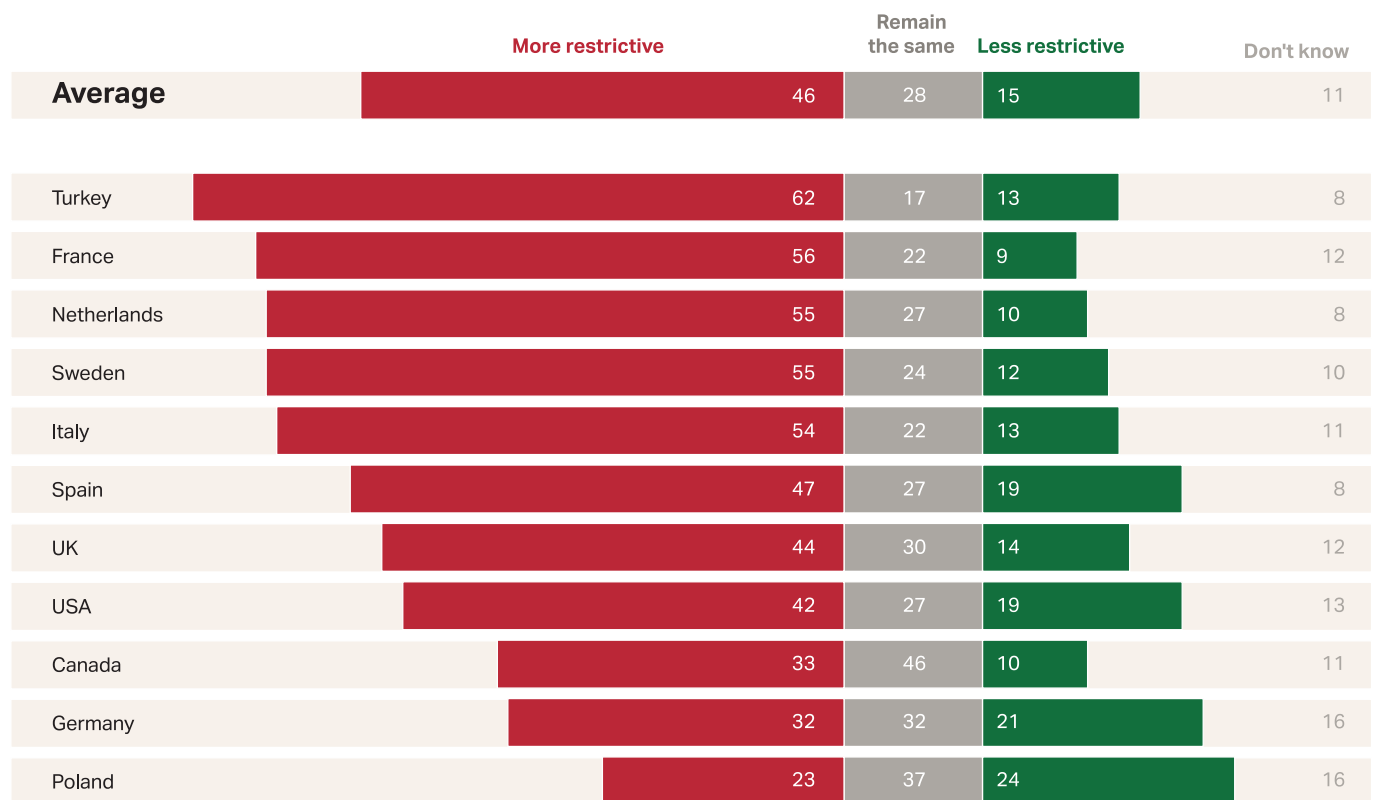
Independent from the overall opinion on policies toward migration, an important generational gap is noticeable across countries. Young people aged between 18 and 24 years show much stronger support for less restrictive policies on migration than their older compatriots. This applies across the board, in both traditionally migrant countries and others as well. In the U.S., 40% of 18-24 year-olds prefer less restrictive measures, compared to 17% on national average, and in the UK 28% compared to 14%. Young French (19%), Turkish (20%), Swedish (22%), and Spanish (30%) respondents are also above average in supporting less restrictive measures; in the case of France, this is almost twice as high as the national average (10%).

SPOTLIGHT

In Germany, voters of the far-right AfD and the liberal FDP show a surprising level of convergence when it comes to views on migration policy: Half of them (both 51%) are in favor of more restrictive policies toward migration, and thereby highly above the national average (32%).

MORE/LESS RESTRICTIVE POLICIES TOWARD MIGRATION

Do you think that your country's policies toward migration should be...?



ABOUT THE PARTNERS



The German Marshall Fund of the United States (GMF)

is a non-partisan policy organization committed to the idea that the United States and Europe are stronger together. GMF works on issues critical to transatlantic interests in the 21st century, including the future of democracy, security and defense, geopolitics and the rise of China, and technology and innovation. By drawing on and fostering a community of people with diverse life experiences and political perspectives, GMF pursues its mission by driving the policy debate through cutting-edge analysis and convening, fortifying civil society, and cultivating the next generation of leaders on both sides of the Atlantic. Founded in 1972 through a gift from Germany as a tribute to the Marshall Plan, GMF is headquartered in Washington, DC, with offices in Berlin, Brussels, Ankara, Belgrade, Bucharest, Paris, and Warsaw.

www.gmfus.org



The Bertelsmann Foundation (North America), Inc., established in 2008, was created to promote and strengthen the transatlantic relationship. Through research, analysis, forums, and audio and multimedia content, we seek to educate and engage a transatlantic audience on the most pressing economic, political, and social challenges facing the United States and Europe. We are the U.S. arm of the Germany-based Bertelsmann Stiftung.

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ACKNOWLEDGEMENTS:

TRANSATLANTIC TRENDS 2021

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The authors of the report are Dr. Alexandra de Hoop Scheffer, director of research for Transatlantic Security and director of the Paris office; Martin Quencez, fellow and deputy director of the Paris office, and Gesine Weber, program coordinator at GMF Paris; Anthony Silberfeld, director of transatlantic relations; and Brandon Bohrn, manager of transatlantic relations at the Bertelsmann Foundation.

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2021 Transatlantic Trends