



2023 **Transatlantic Trends** **Public Opinion in a Shifting Global Order**

Transatlantic Trends 2023

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Methodology

This section describes the methodology of Transatlantic Trends 2023 only. For methodologies related to other recent editions of Transatlantic Trends, and trend data cited in this report, please refer to the methodology sections of previous reports, which can be found at <https://www.gmfus.org/transatlantic-trends>.

The countries covered in this and other recent editions are:

2022 and 2023	Canada, France, Germany, Italy, Lithuania, Netherlands, Poland, Portugal, Romania, Spain, Sweden, Türkiye, United Kingdom, United States
2021	Canada, France, Germany, Italy, Netherlands, Poland, Spain, Sweden, Türkiye, United Kingdom, United States
2020	France, Germany, United States

Kantar Public conducted the Transatlantic Trends 2023 survey. Nationally representative sample sizes are noted to the right, as are fieldwork dates. Survey respondents were at least 18 years old.

Country	Sample Size	Fieldwork Period
Canada	1500	June 15-27, 2023
France	1500	June 15-22, 2023
Germany	1501	June 15-27, 2023
Italy	1501	June 15-22, 2023
Lithuania	1500	June 15-22, 2023
Netherlands	1501	June 15-23, 2023
Poland	1501	June 15-27, 2023
Portugal	1500	June 15-27, 2023
Romania	1502	June 15-28, 2023
Spain	1501	June 15-27, 2023
Sweden	1500	June 15-24, 2023
Türkiye	1500	June 15-26, 2023
United Kingdom	1501	June 15-23, 2023
United States	1502	June 15-26, 2023

Polling was conducted online through panels and self-completion questionnaires. Weighting variables were age, gender, and regional standards (such as income or socio-professional categories) based on national populations as a whole.

For results based on the national samples in each of the 14 countries surveyed, the maximum margin of error attributable to sampling and other random effects is ± 2.5 percentage points at the 95% confidence level. For results based on the total European sample, the margin of error is ± 1 percentage point. In addition to sampling error, question wording and practical difficulties in conducting surveys, such as internet access of certain demographic groups, can also introduce error or bias into public opinion poll findings.

Note on Averages

This report refers to three types of averages, the definitions of which are:

- cross-country average/average across countries: the simple average of all countries polled
- EU average: the simple average of all EU member states covered in the survey
- European average: the simple average of all EU member states covered in the survey plus the United Kingdom and Türkiye

Note on Age Groups

The report disaggregates data by age group and notes results for “the youngest” and “the oldest” age groups. The definitions of these terms are dependent on national demographics and consequently varies, as noted below, across countries.

Age groups	Countries
18-24 (“the youngest”)	France, Germany, Italy, Netherlands, Poland
25-39	
40-54	
55-64	
65+ (“the oldest”)	
18-24	United States
25-34	
35-44	
45-54	
55+	
18-24	Canada, Lithuania, Portugal, Romania, Spain, Sweden, Türkiye
25-39	
40-54	
55+	
18-24	United Kingdom
25-34	
35-44	
45-54	
55-64	
65+	

Note on Graphics

Values in graphics may not add up to 100 due to rounding. Detailed data sets are available upon request.

Foreword

Russia's war on Ukraine, US-China competition, instability in Europe's southern neighborhood, and the climate crisis are symptoms of a deep geopolitical and geo-economic transformation toward a less cooperative, and more competitive, multipolarizing world order. These challenges require multilayered responses—on the national, European, transatlantic, and global level—and a significant effort at communication between citizens and decision-makers. Understanding public priorities is critical for developing effective public policy in a changing strategic environment.

The Transatlantic Trends 2023 public opinion survey shows that perceptions are adapting to new geopolitical realities. Despite war on the EU's doorstep, climate change and immigration are seen as the most important security challenges among a majority of publics polled. Respondents, however, are increasingly split on whether the United States or China will be the world's most influential actor in five years, implying a shift toward bipolarity that reflects a significant decline in American power in the near term. At the same time, China is not widely seen as a security challenge, and a willingness to expand cooperation with the country on emerging technologies, trade, and crisis management prevails over a tougher approach.

This report's assessment of transatlantic relations is rather sober, as most respondents also expect the relationship between the United States and Europe to remain the same in the years ahead, with even a slight decline since 2022 in optimism about closer relations. Regarding European security, US involvement and a call for more action from the EU receives considerable support. The EU and NATO, unsurprisingly given that support, are broadly seen as equally important for ensuring security. In fact, a majority of respondents in EU member states want the EU to do more on security and defense, which could become a strategic imperative in light of uncertainties about future US domestic and foreign policy. A plurality of US respondents see their democracy in a bad state, and they are the

most critical of those surveyed of President Joe Biden's foreign policy. Meanwhile, Republican-leaning respondents are increasingly critical of support for Ukraine.

Current public opinion suggests that, despite the West's unrivalled effort to counter Russia's war on Ukraine, the transatlantic relationship is perceived as unfit or insufficient to address future challenges. This is reflected in the public's desire to enhance cooperation with China on trade, new technologies, and crisis management, and in the widespread belief that national governments are not leaders in the fight against climate change.

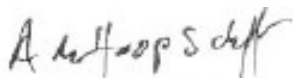
A significant generation gap on many issues is also notable. Young respondents are more likely than their elders to view US influence negatively and Chinese and Russian influence positively. The young are less convinced than their elders of NATO's importance for their countries' security. Young respondents are also more likely to predict a shift toward multipolarity in the next five years, with China succeeding the United States as the world's most influential actor and the EU's becoming a more powerful third player. These trends, already observed in 2021 and 2022, must not be ignored. They will shape the future transatlantic relationship.

Survey findings reveal that the transatlantic partnership needs to define a wider and more meaningful agenda if it is to remain geopolitically relevant. The findings consistently demonstrate the importance of addressing intermestic challenges—those that have global and domestic dimensions and consequences—such as geopolitical tensions, the climate crisis, democratic backsliding, and the root causes of immigration. The expectation of a looming global power shift also reveals that transatlantic cooperation is only a starting point for these efforts. The transatlantic partners must think more creatively about engaging with others further afield if policy goals are to be achieved, as outlined in GMF's recent work on "Alliances in a Shifting Global Order". Transatlantic Trends 2023 now lays even

more intellectual groundwork for the necessary conversation on European and transatlantic interests by providing insight into linking this grand-strategy perspective to policies that reflect public priorities.

Transatlantic Trends 2023 presents the results of representative surveys conducted in 14 countries on both sides of the Atlantic: Canada, France, Germany, Italy, Lithuania, the Netherlands, Poland, Portugal, Romania, Spain, Sweden, Türkiye, the United Kingdom, and the United States. Divided into five chapters, this report assesses public opinion on contemporary structural issues impacting the world order, transatlantic relations, security and defense, China, and global challenges.

The Transatlantic Trends series is a flagship publication of the German Marshall Fund of the United States (GMF), providing policymakers, business leaders, experts, and the broader public with in-depth and comprehensive public-opinion analysis of relevant political, economic, and strategic trends. I am convinced that the survey findings provide helpful tools for all those communities, the media, academia, and others who wish to foster and contribute to a healthy debate about increasingly important transatlantic cooperation.



Dr. Alexandra de Hoop Scheffer
Senior Vice President, Geostrategy
German Marshall Fund of the United States

Summary of Key Findings

Publics are wary of the idea of sending arms or troops to Taiwan if China were to invade the island, but they would support responding with diplomacy or sanctions.

Interest in cooperating with China on new technologies, trade, and energy and raw materials outweighs a preference for a tougher approach to Beijing.

Respondents in most countries see immigration or climate change as the most important security challenge.

The percentage of respondents who believe China will become the world's most influential actor is approaching the percentage of those who believe the United States will retain this position.

Canada, Germany, and Sweden are seen as the most reliable partners by foreign publics.

Young respondents hold more positive views of China and are more open than their elders to cooperating with the country.

Respondents in France and Germany see the other country as a highly reliable partner and as more reliable than the United States.

US respondents are the most critical of President Joe Biden's foreign policy. Respondents in Lithuania, Poland, and Portugal are the most supportive.

The scientific community is seen as the actor doing most to address climate change. One-quarter of respondents say China does nothing about the issue.

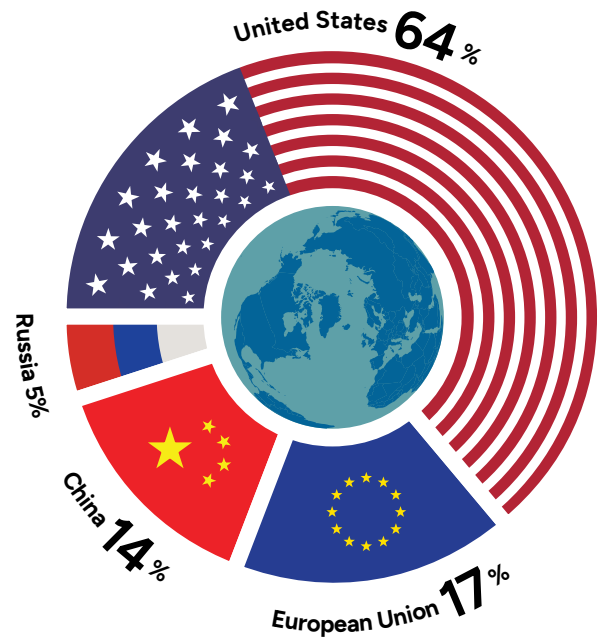
<p>Large majorities agree with providing Ukraine with financial support for reconstruction and offering it NATO or EU membership.</p>	<p>Fewer than half of French and US respondents believe that their national democracy is in a good state. More than one-quarter (27%) of US respondents see their democracy in danger.</p>
<p>In Europe, British, Lithuanian, Polish, and Spanish publics are most in favor of different policy options to support Ukraine. German, French, and Italian publics are more hesitant.</p>	<p>NATO and the EU are seen as equally important pillars of national security. Support for US involvement in European security and defense remains high.</p>
<p>More than three of five respondents outside the EU say the bloc is a reliable partner for their country, a share that has increased by 6 percentage points since last year.</p>	<p>Respondents mostly anticipate the status quo in US-European relations in the coming years. The share of those expressing optimism about closer relations has decreased since last year.</p>
<p>Majorities in almost all countries think the EU should do more on security and defense, and support for this is even higher outside the EU than inside the bloc.</p>	<p>Young respondents hold more positive views than their elders of Russia's influence in the world.</p>
<p>The willingness of publics to work only with democracies to address global challenges is highest in Türkiye and lowest in the United States.</p>	<p>Seven of 10 respondents in the United Kingdom believe the EU is important for their country's national security.</p>



Global Order

Most Influential Actor in Global Affairs

The United States is viewed as the most influential global power by almost two-thirds (64%) of respondents, while the EU (17%) and China (14%) lag far behind. Significant differences among public perceptions in the countries surveyed, however, exist.



Perceptions of power among North American and European populations have remained remarkably stable from 2022 despite the past year's geopolitical developments. Fully 87% of US respondents now believe that the United States is the most influential global power, up 1 percentage point over last year. In Europe, 62% agree, which reflects no change from last year. After the US respondents, the most likely to see the United States as the world's most powerful country are respondents in Canada (70%) and Poland and Portugal (both 68%). Dutch (58%) and Italian (57%) respondents are least likely to share this view.

Like the perceptions of US influence, those of EU, Chinese, and Russian influence on global affairs are almost unchanged from 2022. EU member-state publics are generally more likely to see the bloc as the world's most influential power (19%) than publics outside the EU (12%). Respondents in Lithuania (23%), Poland and Spain (both 21%), and Germany and Sweden (both 20%) are most likely to see such a powerful EU. Those on the bloc's geographic margins—19% of Turkish respondents and 18% of British respondents—are slightly less likely to agree with that perspective, while only 9% of Canadian respondents and 3% of US respondents see the bloc in this way.

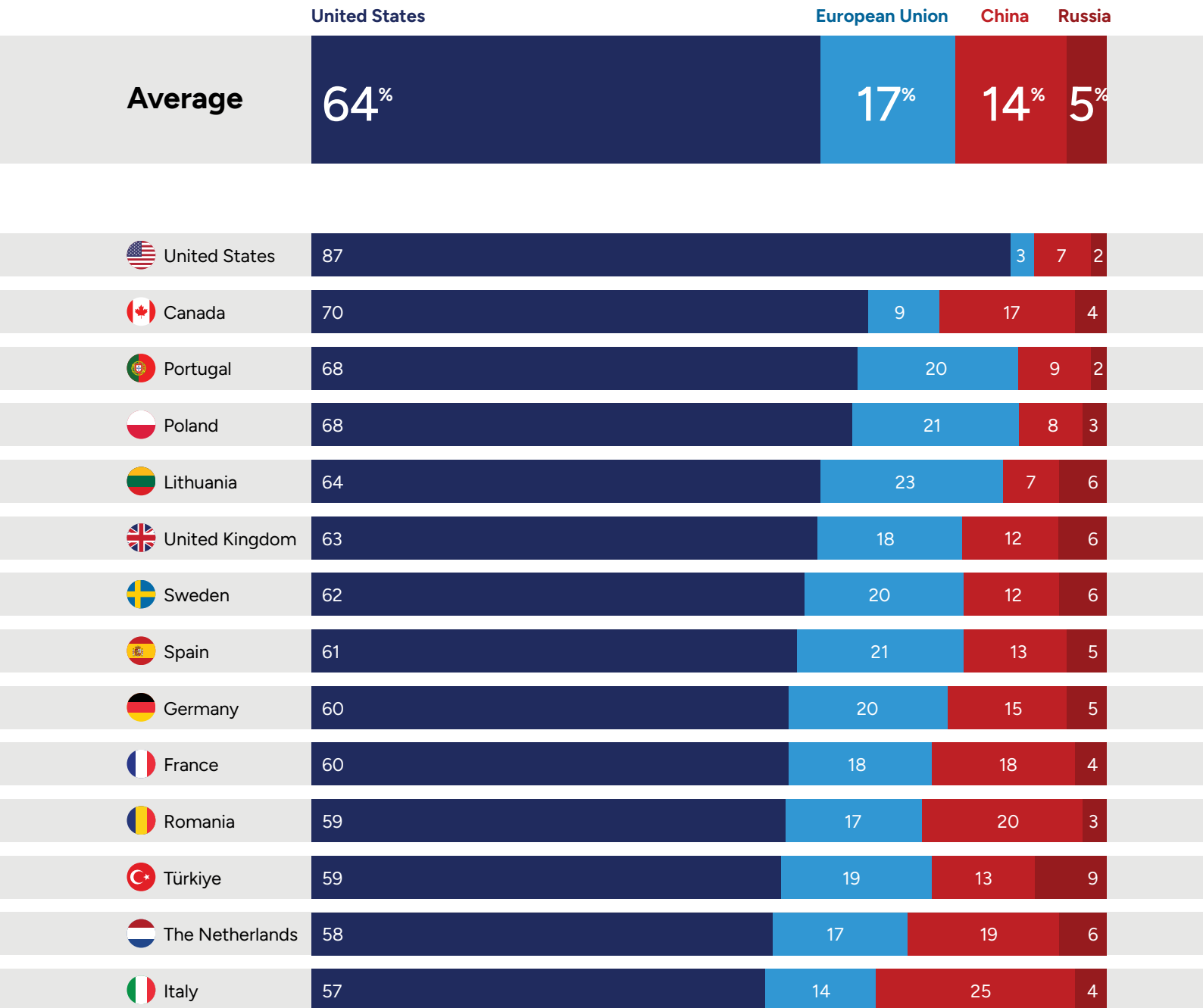
Populations are more divided on perceptions of China. One-quarter (25%) of Italian respondents and almost one-fifth of Dutch (19%) and French (18%) respondents already see China as the world's most influential power. But fewer than one-tenth of respondents in the United States and Lithuania (both 7%) and Poland (8%) agree. These respondents are the least likely to consider China the top global power.

The course of Russia's war in Ukraine over the past year has had no effect on perceptions of the Kremlin's global influence. Only 5% of respondents see it as the world's most influential power, down from 6% in 2022.

SPOTLIGHT Age and political affiliation affect the US public's perception of China's influence. Republican-leaning respondents (11%) and those over 55 (12%) are about twice as likely as Democrat-leaning respondents (5%) and those aged between 18 and 24 (6%) to say that China is the leading global power.

Rank the following actors in the order of which you think is most influential to least influential in global affairs:

% who say _____ is the most influential actor in global affairs

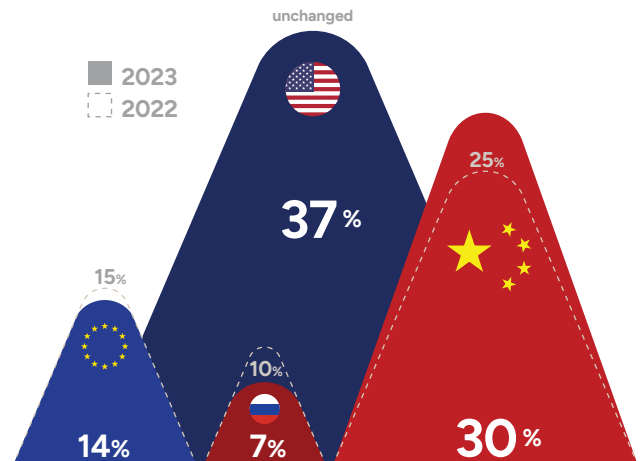


Most Influential Actor in the Next Five Years

Respondents anticipate a sharp decline in US global influence and predict China's will rise to almost that of the United States over the next five years. EU and Russian influence are expected to remain about the same over the period.

Transatlantic publics expect the global order to change significantly in the next five years. While 64% describe the United States as the world's most influential actor today, only 37% believe that this will be the case in five years. In contrast, most respondents expect China's influence to grow, with 30%, an increase of 5 percentage points since last year, seeing it as the world's most influential actor in five years. US respondents remain the most optimistic about their country's retaining its status as the world's most influential actor in five years (59%), but that still reflects a sharp drop from the 87% who see the country as preeminent today. Belief in a decline in US influence is, however, widespread on the other side of the Atlantic. Fewer than half of respondents in Lithuania (48%) and Poland (45%) see the United States as the world's most influential actor in five years, and these are the highest shares among European publics surveyed. On average, across all European countries, the perception of the United States as the preeminent influencer today versus in five years plummets 27 percentage points.

Perceptions of decreasing US influence and increasing Chinese influence over the next five years are correlated. Few see the EU (17%) or China (14%) as the world's most influential actor today, and even fewer see the EU (14%) in that position in five years. However, nearly one-third of respondents (30%) believe China will assume that role in the same period. Respondents in France (42%) and Italy (51%) are the most likely to say that China will replace the United States as the most influential actor in global affairs in five years. Respondents in Germany, the Netherlands, Romania, Spain, and Türkiye are almost evenly split on whether



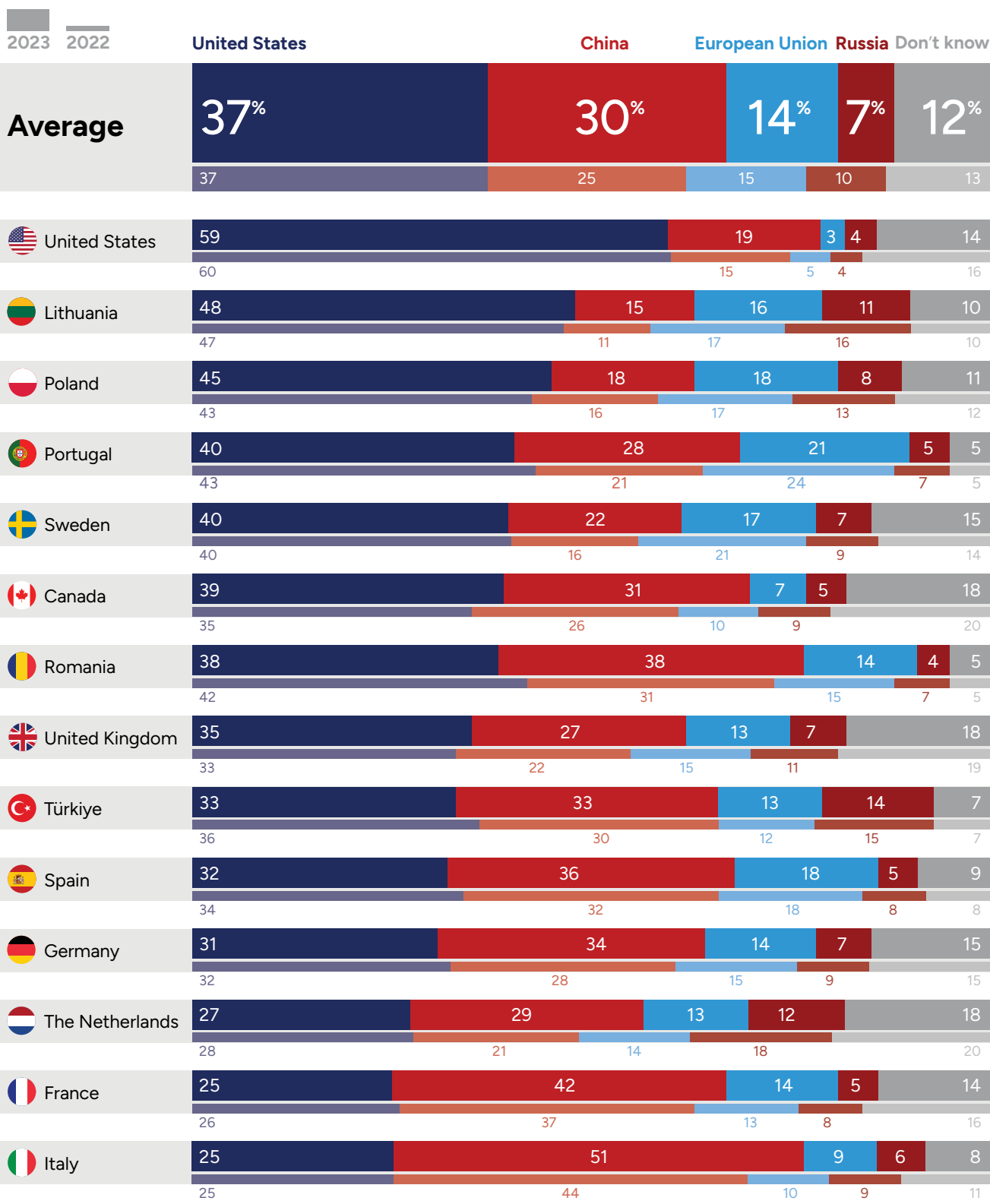
the United States or China will be the most influential in that timeframe.

Still, respondents in EU member states are more likely to see the bloc as the most influential actor in the future than those outside the EU (15% versus 9%), and the youngest EU respondents are the most optimistic about the bloc. Nearly one-third (31%) of German respondents between the ages of 18 and 24 see the EU as the world's most influential actor in five years, on par with the same cohort in the Netherlands (32%) and the United Kingdom (28%). Only slightly behind them are the cohorts in France (25%), Sweden (25%), and Lithuania (24%).

Respondents do not predict notable shifts in Russia's global influence in five years. Few (5%) see the country as the world's most influential today, and only 7% see it achieving that status in five years. The largest increase in those seeing Russia gain influence are in the Netherlands (up 6 percentage points), Lithuania, Poland, and Türkiye (all up 5 percentage points).

SPOTLIGHT US perceptions of the country's global influence and that of China show a partisan divide. Fully two-thirds (66%) of Democrats believe their country will remain the world's most influential in five years, compared to 57% of Republicans. But more Democrats (24%) than Republicans (16%) also believe China will oust the United States from its position. The belief that the EU and Russia will retain only marginal influence shows little partisan divide.

Which of the following actors will be the most influential in global affairs in the next five years?



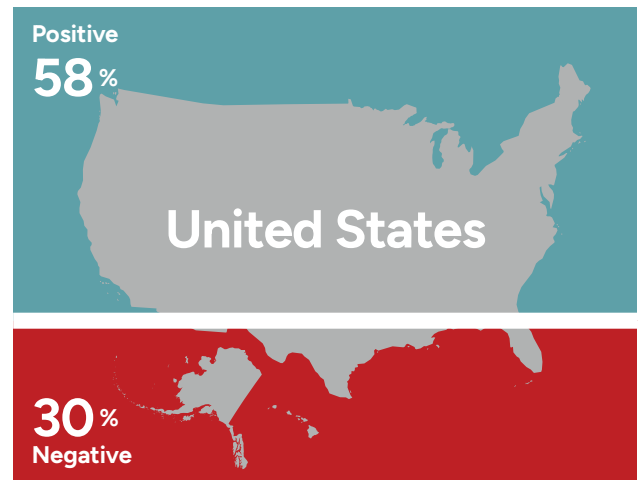
Sentiment About US Influence in Global Affairs

Overall, respondents approve of US influence in world affairs. Fully 58% express approval, similar to the result in last year's study (57%).

The perception of US global influence has remained stable over the past year in almost all 14 countries surveyed. Respondents in Lithuania (73%), Poland (72%), and Portugal (70%) give the greatest approval of US influence. They are followed by large majorities in Romania (63%) and the Netherlands and Sweden (both 60%), results essentially unchanged from 2022. Positive perceptions in France and Spain (both 51%), Italy (46%), and Türkiye (40%) reflect more ambivalence, although the Turkish population has become notably more positive over the past year (up 17 percentage points). The Germans' less positive perception of US global influence, having fallen from 53% approval to 48% over the past year, is unique.

Negative sentiment toward US influence reaches 30% on average across all countries surveyed but varies significantly among those countries. Turkish respondents are the most negative (51%), followed by those in Italy and Spain (both 39%). More than one-third of those in Germany (35%), and France (34%) also say that they have a generally negative perception of US global influence. In contrast, only 17% in Lithuania and 14% in Poland see US influence that way.

Generational divides are not consistent among the countries surveyed. Italian respondents between 18 and 24 have a more positive sentiment (55%) than Italians over 65 (46%). The opposite is true in Germany, where 59% of the

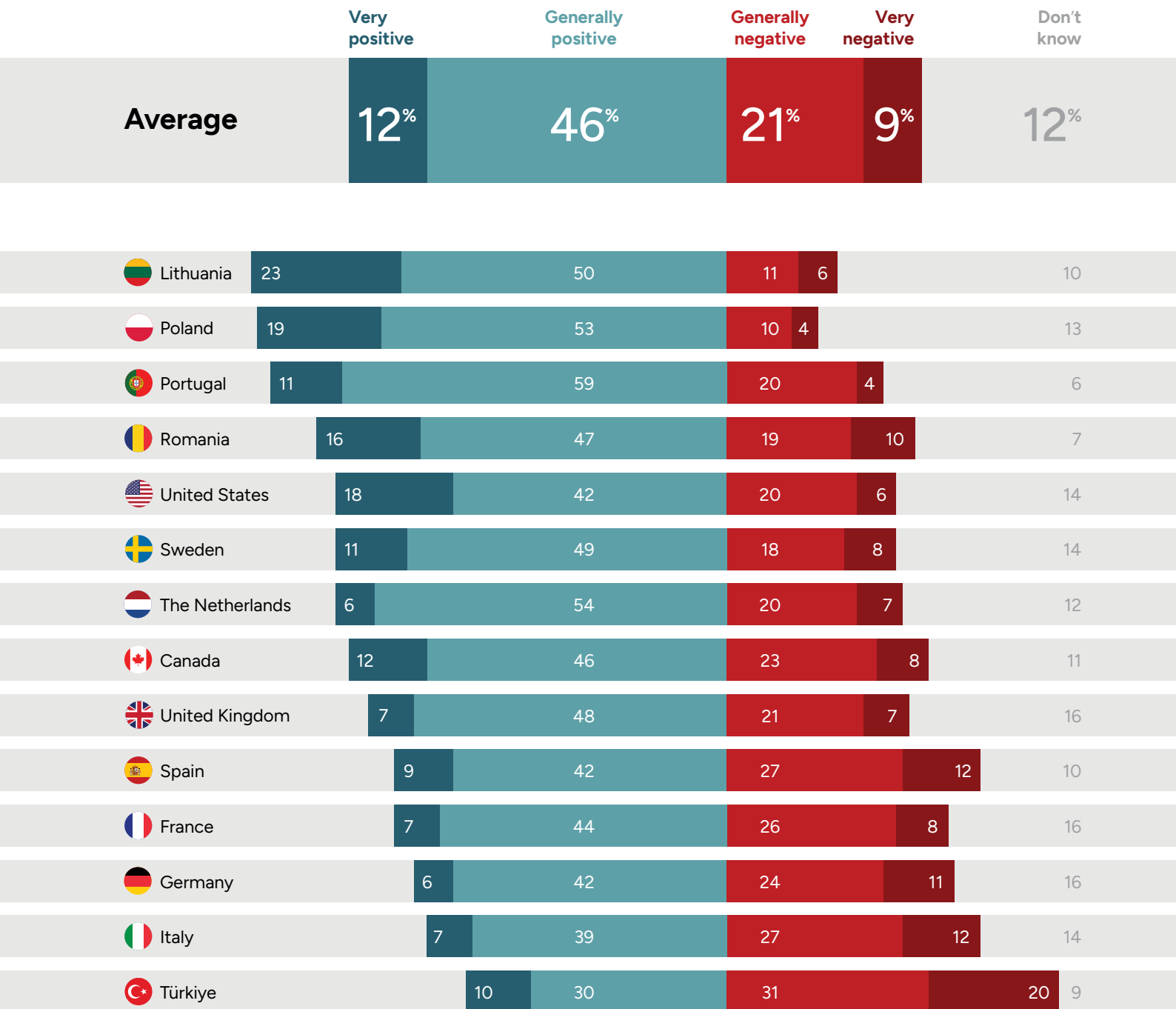


older respondents and 52% of the younger respondents have a positive view of US influence. Age matters notably in the United Kingdom, where 61% of British respondents over 65 are positive about US influence versus 42% of 18- to 24-year-olds.

In the United States, 60% of the overall population sees the country's global influence positively. But those older than 55 (70%) are more likely to have this view than the youngest US respondents (54%). Political affiliation also constitutes an important dividing line. Twice as many Republican-leaning respondents (31%) as their Democrat-leaning counterparts (15%) have a negative perception of US influence.

SPOTLIGHT Dutch respondents are the most divided along generational lines on the issue of US influence. The gap is nearly 30 percentage points, with 79% of those over 65 expressing positive sentiment about US influence compared to 51% of those between 18 and 24.

How do you feel about the United States' influence in global affairs?



Sentiment About the EU's Influence in Global Affairs

Positive perceptions of the EU's global influence prevail in all countries surveyed. In Türkiye, positive views have leaped 16 percentage points since 2022.

EU influence in world affairs is generally seen more positively (64%) than that of the United States (58%), China (28%), or Russia (18%). Such views have generally held stable in recent years, though Türkiye, where positive views of the EU have significantly increased since 2022 (51% versus 35%), is a notable exception. Still, Turkish respondents also have the least positive views of the EU's global influence (51%), even if they are up 16 percentage points since last year to nearly match the perspective of respondents in the United States, who have the second-least positive view of EU influence (55%).

Within EU member states, respondents in Germany (56%) and France (57%) are least likely to express positive views about EU influence. Perhaps surprisingly, those figures are just below that for the United Kingdom (59%). French and British public opinion has changed little on the issue, while positive views in Germany have dropped 7 percentage points in the last year. In contrast, overwhelming majorities of Portuguese (85%) and Lithuanians (79%) express positive feelings toward the EU's global influence.

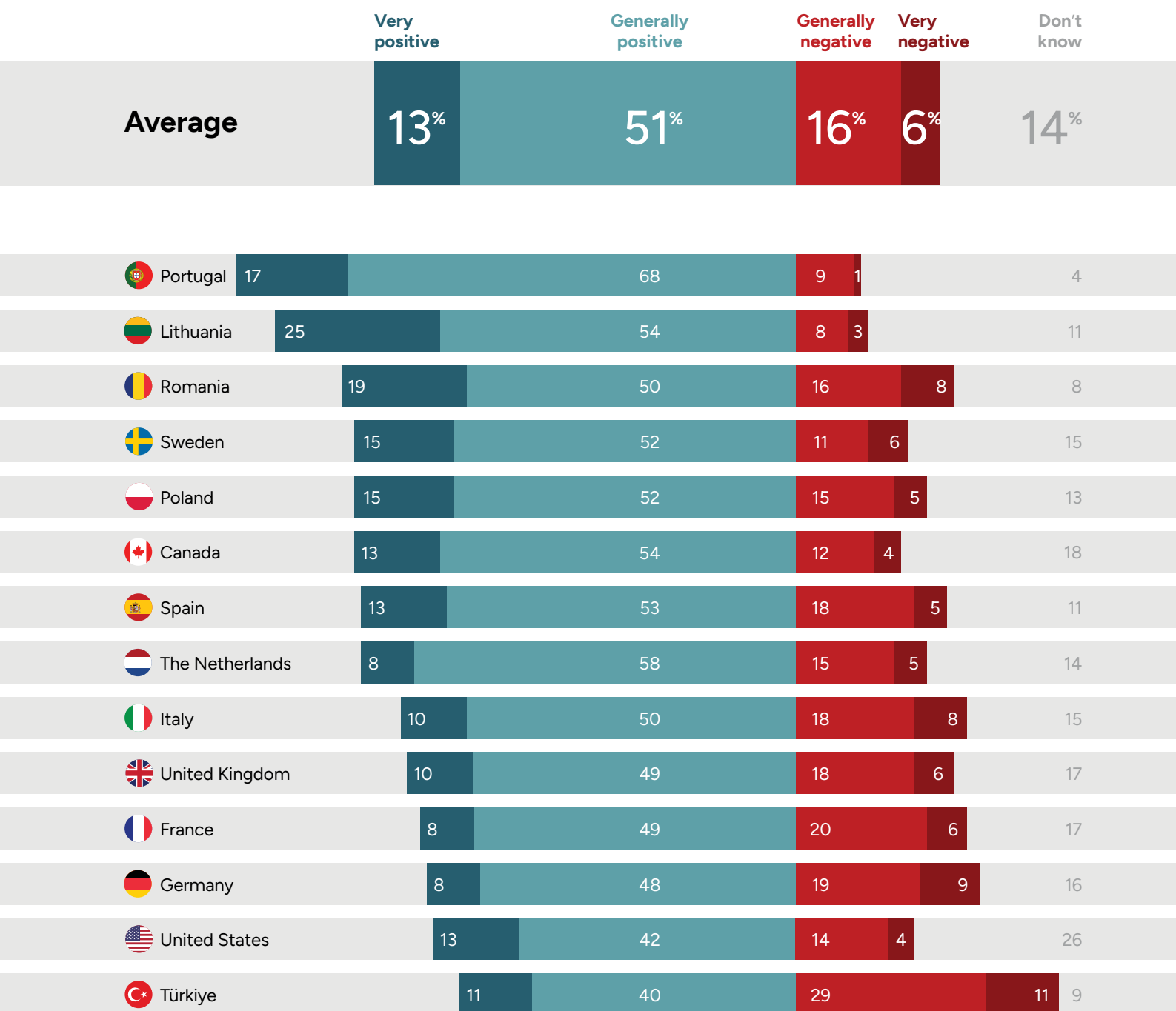
In North America, age and positivity toward EU influence strongly correlate. Fully 75% of the oldest Canadian respondents, compared to 59% of respondents aged 18 to 24, hold positive views. The divide is similar in the United States (62% versus 50%). It holds true in Türkiye, too (62% versus 44%).



Many of the EU member states' youngest respondents are not among the least enthusiastic about the bloc's influence. In some EU member states, positive sentiment about the bloc's global influence is above average among the oldest respondents. This is the case in Poland (65% versus 74%), and, to a lesser extent, in the Netherlands (71% versus 76%) and Germany (60% versus 64%). The opposite result appears in Italy, where the youngest respondents are more likely to have a positive feeling about the EU's global influence than the oldest (69% versus 62%).

SPOTLIGHT Respondents leaning toward right-wing parties are much more likely than average to hold negative views of the EU's global influence. This is the case in Germany (61% of AfD-leaning respondents versus a national average of 28%), the Netherlands (39% of Party for Freedom-leaning respondents versus a national average of 20%), France (42% of Rassemblement National-leaning respondents versus a national average of 26%), Italy (40% of Lega-leaning respondents versus a national average of 26%), and Spain (36% of VOX-leaning respondents versus a national average of 23%).

How do you feel about the the European Union's influence in global affairs?

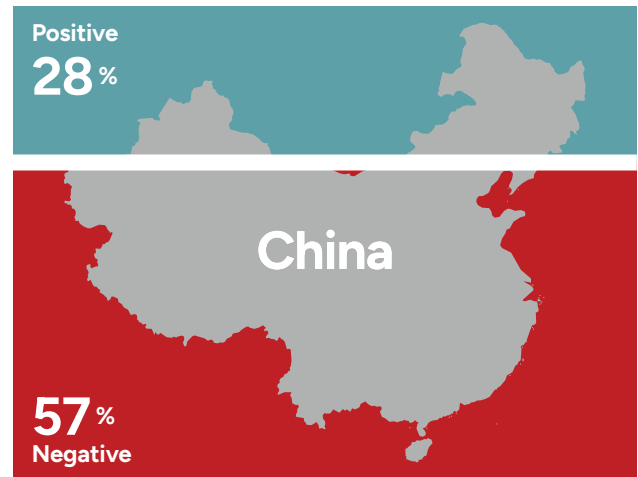


Sentiment About China's Influence in Global Affairs

A majority of respondents (57%) view China's influence in the world negatively, but national results vary significantly.

Stability is a feature of attitudes toward China's influence in the world. Little change is noted since 2021. A majority of respondents in all countries, except Romania and Türkiye, view China's influence in the world negatively. Sweden (69%) tops the list, followed by Canada, the United Kingdom and the Netherlands (all 64%), as well as Germany (63%). In contrast, almost half of respondents in Romania (48%) and Türkiye (45%) see China's influence positively. US respondents do not significantly differ from many of their counterparts elsewhere, with 58% viewing Chinese influence negatively and 26% positively, but they provide the second-highest share of those describing Chinese influence as "very positive" (10%, compared to an average of 6%), second to Türkiye (12%).

A correlation between political orientation and attitudes toward China exists in some cases, but there is no clear trend across countries. Conservative-leaning respondents in some countries hold the most negative views of Chinese influence. In the United States, for example, 69% of Republican-leaning respondents, versus a national average of 58%, perceive Chinese influence negatively. In the United Kingdom, it is 79% of Conservative-leaning respondents versus a national average of 64%, while in France, it is 74% of Les Républicains-leaning respondents versus a national average of 58%. In Italy, it is 64% of Fratelli d'Italia-leaning respondents versus a national average of 52%, while in Spain it is 63% of VOX-leaning respondents versus a national average of 53%. In Germany, those who lean toward the Greens, traditionally on the left of the political spectrum, have the most negative views of China's influence (74%).

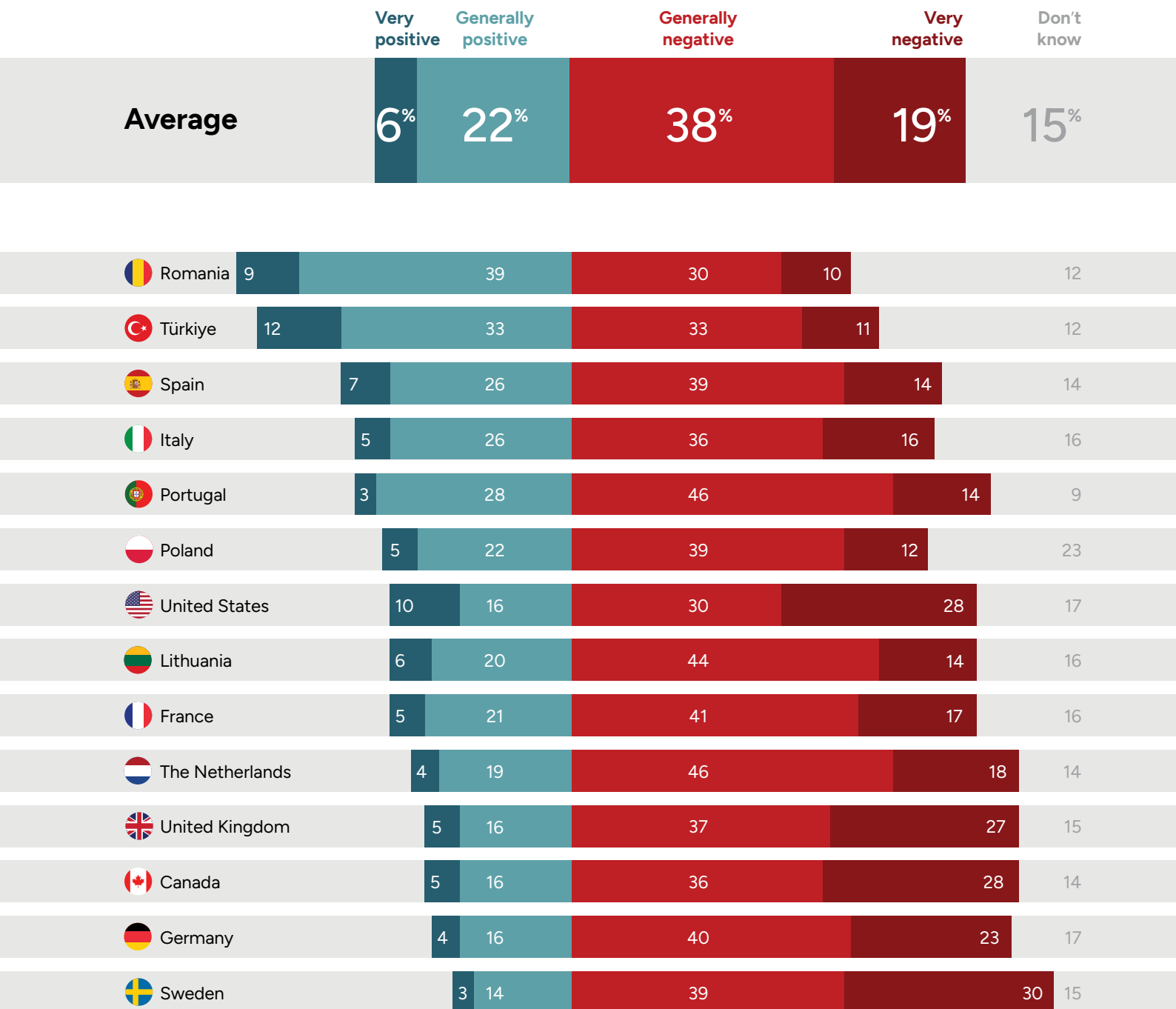


As in previous editions of Transatlantic Trends, the youngest respondents (aged 18 to 24) generally hold more positive views of China's influence than the oldest age groups. The most significant generational gaps are in the United Kingdom, where 39% of the youngest respondents feel positive about China compared to 6% of the oldest, in the United States (33% versus 8%), and in France (45% versus 14%). With the exception of Portugal, Romania, and Türkiye, generational gaps between 8 and 25 percentage points can be seen in all surveyed countries.

A gender gap on the issue is also seen in several countries. Women are twice or almost twice as likely as men to select the option "don't know" in the United States (23% women, 10% men), Germany (23% versus 11%), the United Kingdom and Sweden (both 20% versus 9%). Similar results are noted in Italy, Canada, Portugal, and Romania.

SPOTLIGHT The generation gap in Türkiye is the opposite of that often observed elsewhere. Here, the oldest respondents are more likely than the youngest (55% versus 42%) to hold positive views of China. At the same time, young respondents were more likely not to express an opinion (16% versus 7%).

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



Sentiment About Russia's Influence in Global Affairs

Russia's influence in global affairs is perceived negatively by a majority of respondents in all 14 countries surveyed. Four-fifths of respondents in the Netherlands, Portugal, and Sweden express negativity, above the overall average of 71%.

Opinions in 2023 largely confirm the previous year's results with another clear rejection of Russia's global influence. This negative sentiment is particularly intense in Poland (59% very negative, 19% generally negative), Sweden (62% very negative, 18% generally negative), Lithuania (59% very negative, 15% generally negative), and the United Kingdom (55% very negative, 19% generally negative). Proximity to Ukraine tends to raise negative perspectives of Russian influence, but geography is not a defining factor. Populations in Portugal (55% very negative, 30% generally negative), the Netherlands (54% very negative, 28% generally negative), and Spain (42% very negative, 31% generally negative) are more critical than in Romania (34% very negative, 32% generally negative).

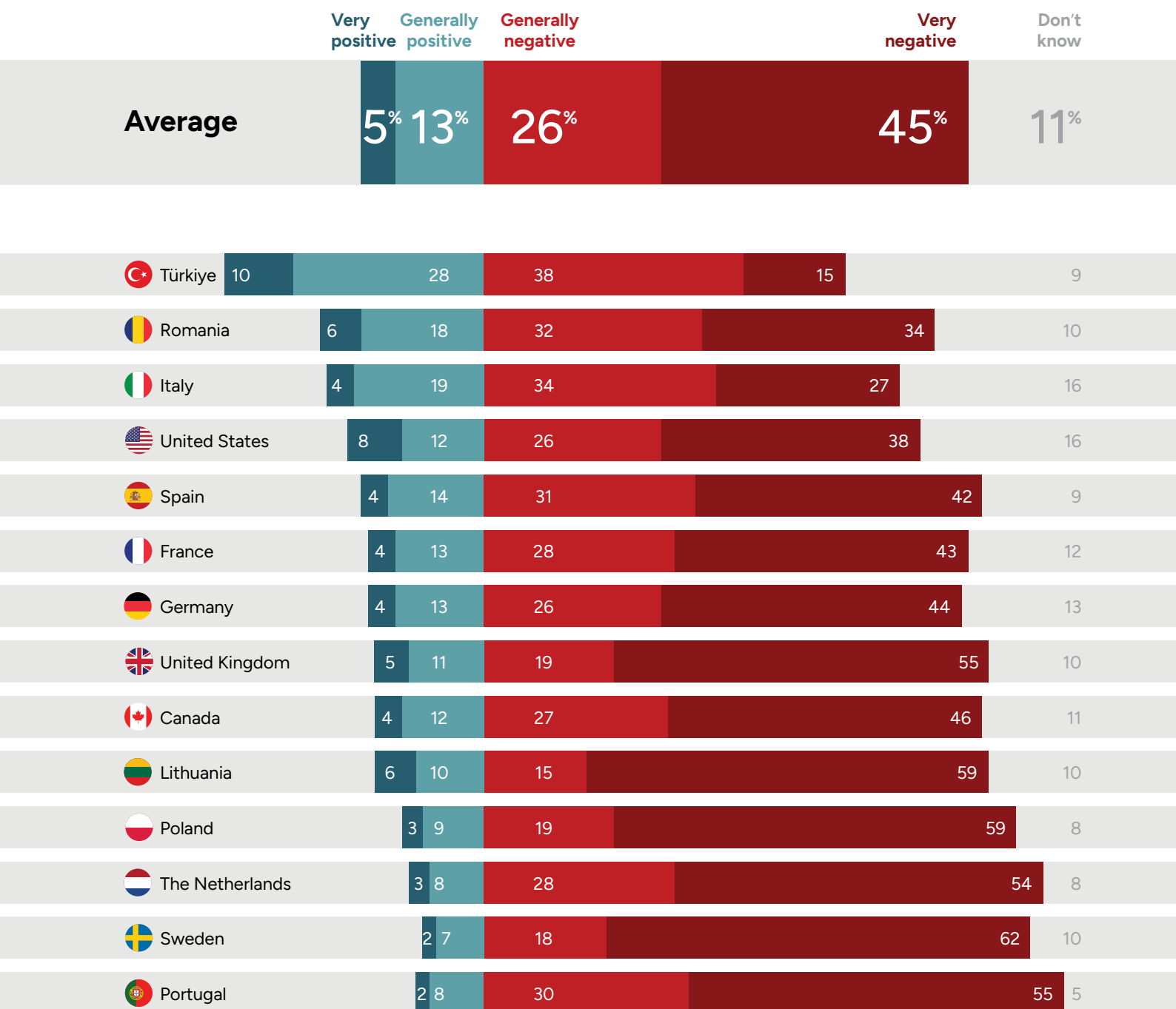
Almost two-thirds of US respondents (64%) have a negative view of Russian influence. This opinion is bipartisan and held by 69% of those who lean Republican and 65% of those who lean Democrat. There is, however, a sharp generational divide. Fully 88% of US respondents over 55 reject Russia's influence, but only 53% of 18- to 24-year-olds do the same. Conversely, 30% of these youngest respondents have a positive feeling toward Russian global influence, a sentiment shared by only 4% of those over 55. A similar generation gap exists in Germany, Spain, and the United Kingdom.



Respondents in Türkiye (38%), Romania (24%), and Italy (23%) are the most likely to have a positive opinion of Russia's influence, a result that mirrors last year's findings. The Turkish result shows a significant, and unique, increase of 15 percentage points in positive views of Russian influence.

SPOTLIGHT The most striking generation gap on the issue of Russian influence is in Germany. There, 37% of 18- to 24-year-olds but only 7% of respondents over 65 see Kremlin influence positively.

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

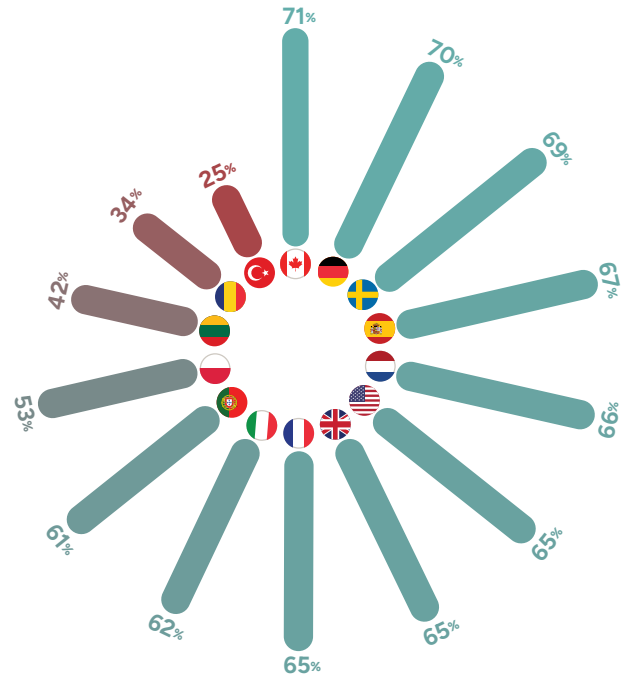


Transatlantic Relations



Reliability of Partners

Canada, the EU, Germany, and Sweden are perceived by respondents elsewhere as the most reliable partners among the countries included in the survey. Romania and Türkiye, as in 2022, are perceived as the least reliable.



Positive views of Canada's reliability are found in almost all countries surveyed, and reach 80% among respondents in Sweden and the Netherlands. This is in line with 2021 and 2022 results, and reflects the stability of Canada's image in transatlantic societies.

Türkiye's reliability is also stable, though there is much skepticism. Only 16% of respondents in Germany and 14% of respondents in Sweden see Türkiye as reliable. At the same time, Turkish respondents have limited trust in their transatlantic partners, with a majority (57%) there seeing France as unreliable.

The EU is generally viewed as reliable, especially within the bloc. Fully 88% of respondents in Portugal and 86% in Lithuania believe the EU is reliable. This opinion is shared by 64% of US and 61% of British respondents, both slight increases over 2022. Two-thirds (68%) of respondents in Germany also consider the EU reliable, although that is the lowest level seen in any surveyed member state.

The overall perception of US reliability remained stable between 2022 and 2023 (65%), but national results show variations. In Poland, the United States is seen as reliable by 79% of respondents. That represents no change from 2022. In Türkiye, however, 31% say the United States is a reliable partner, up 14 percentage points from 2022. This near-doubling of positive Turkish views of the United States contrasts with a 5-percentage-point drop, to 60%, in Germany and a 4-percentage-point fall, to 57%, in Spain.

Almost three-quarters of US respondents continue to view Canada (73%, up 2 percentage points from 2022) and the United Kingdom (71%, down 1 percentage point from 2022) as their country's most reliable partners. France follows, with 61% of US respondents seeing it as a reliable partner.

The perception of the United Kingdom's reliability varies greatly among EU member states. Respondents in France (53% see the United Kingdom as reliable), Spain (53%), and Germany (51%) are split, but those in Sweden (83%), Lithuania (78%), Portugal (73%), and Poland (70%) show great trust in the United Kingdom.

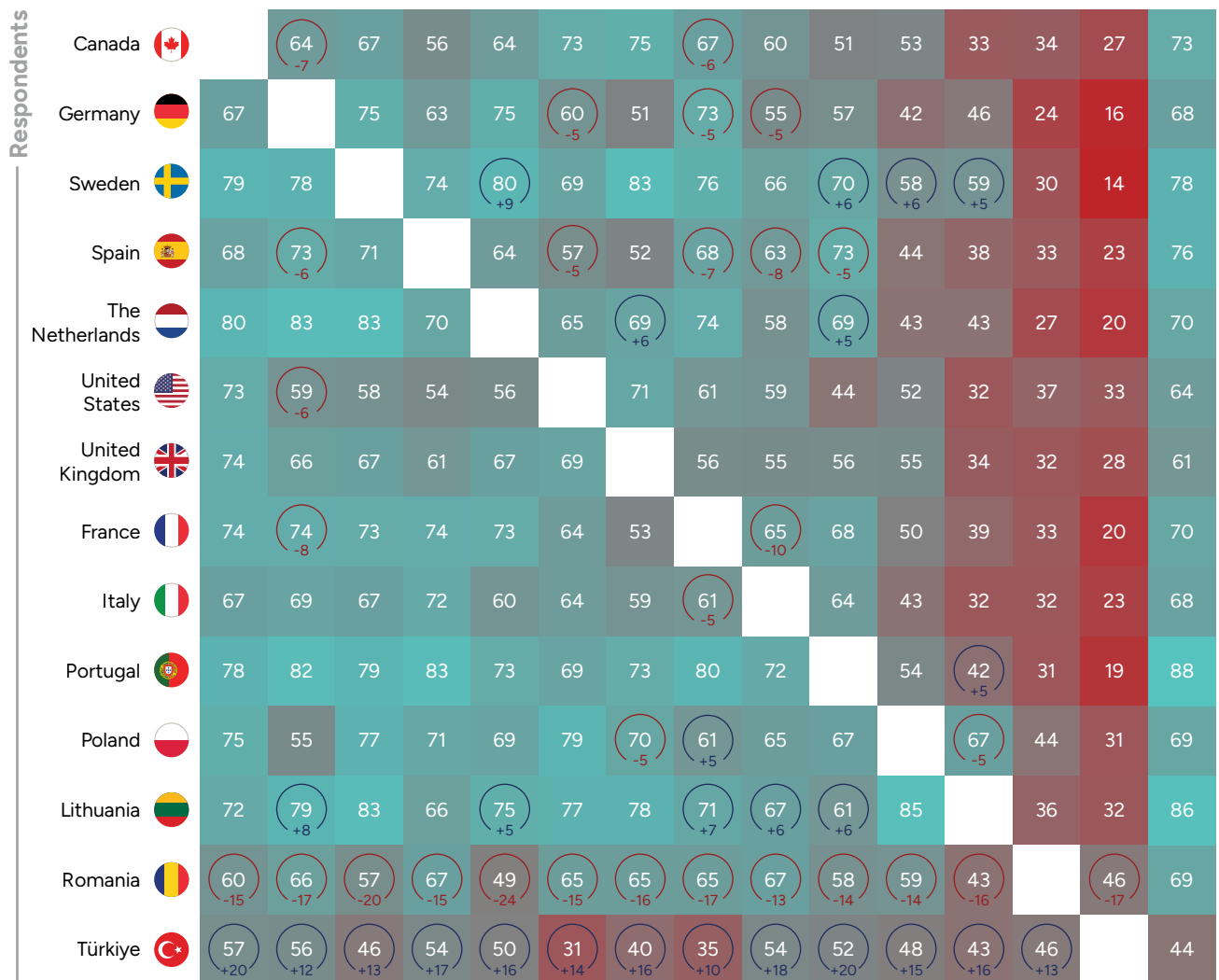
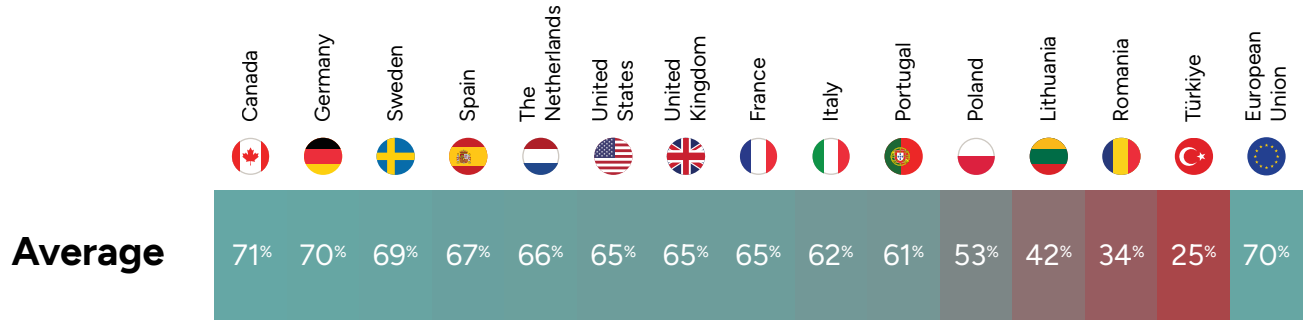
French respondents have become more skeptical of German reliability, and German respondents feel similarly about France. Nearly three-quarters in each country (74% in France, 73% in Germany) view the other as reliable, but that is down 8 percentage points from 2022 in France and 5 percentage points in Germany. Polish views of Germany are stable, with 55% (up 1 percentage point from 2022) seeing their neighbor as reliable. France, however, has gained trust among Polish respondents. Three-fifths of them (61%, up 5 percentage points from 2022) believe France is a reliable partner.

SPOTLIGHT Romania has become more doubtful of its partners. The portions of those seeing the Netherlands, Sweden, and France as reliable have dropped 24 percentage points, 20 percentage points, and 18 percentage points, respectively, since last year.

Do you think each of the following actors is a reliable partner for your country?

Total percentage, somewhat and very reliable (changes of more than 5 percentage points from 2021 circled)

Seen as reliable

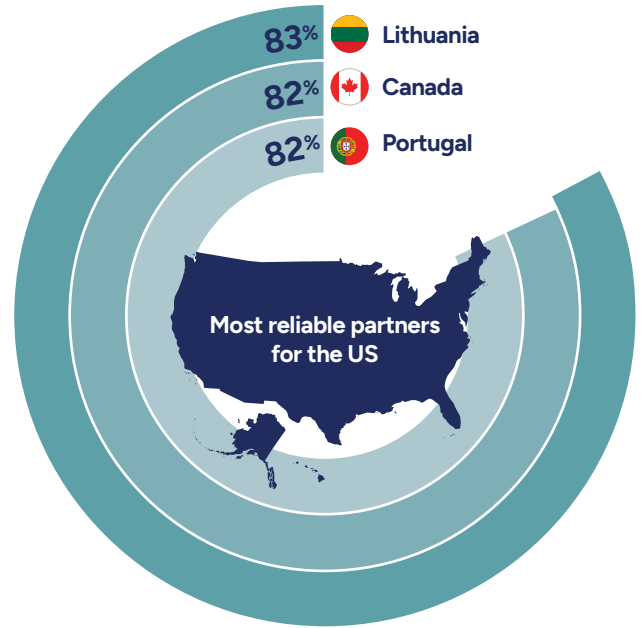


Reliability of One's Own Country as a Partner

Strong majorities in almost all surveyed publics believe that their nation is a reliable partner for the United States and European countries, though Turkish respondents are less likely than others to consider their nation a reliable partner.

More than three out of four respondents on average see their own nation as a reliable partner for the United States (75%) and European countries (78%). Respondents based in EU member states are slightly more certain of their nation's reliability as a partner for both (78% and 80%). The Turks aside, the Spanish are least certain about their country's reliability as a partner for the United States (69%). Publics that see their countries as relatively less reliable for European countries—yet still high in nominal terms—are found in Poland (70%), the United Kingdom (71%), Italy and the United States (both 73%). The share of American Democrats describing the United States a reliable partner for European countries (82%) is above the national average, as is the share of the oldest respondents (81%) who say the same. The oldest Canadian respondents feel similarly about their country (89% versus a national average of 80%).

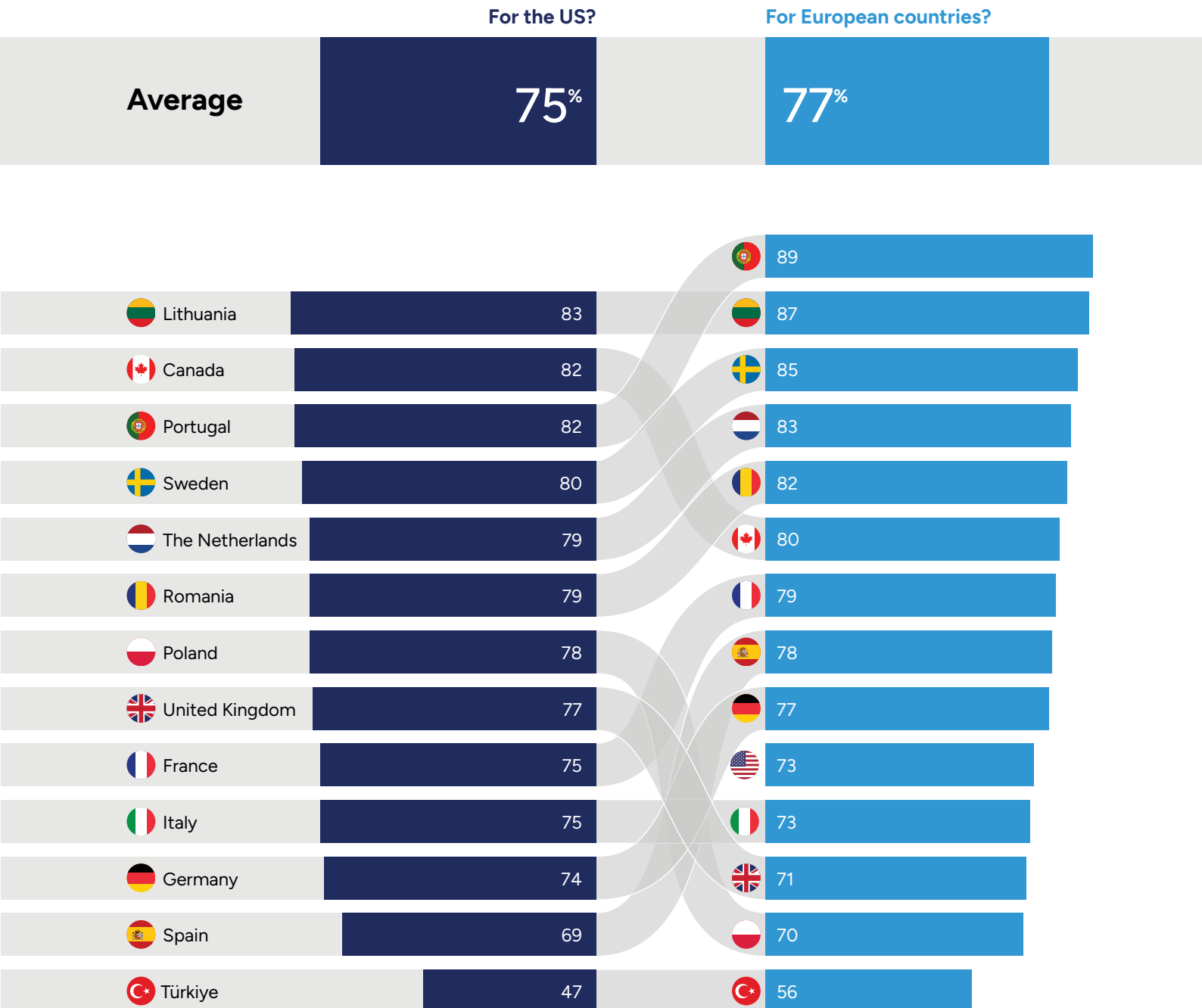
The perception of a country's reliability among its own population mirrors that of foreign populations if that perception is one of strong reliability or strong unreliability. In Canada, for example, which is perceived as a reliable partner by the most respondents elsewhere (71%), four out of five respondents agree that their country is a reliable partner for the United States (82%) and for European countries (80%). Türkiye is seen as the least reliable partner by respondents elsewhere (25%), and Turks concur. They also hold a more negative assessment of their own country's



reliability than respondents in other surveyed countries. Fewer than half of Turkish respondents (47%) believe that Türkiye is a reliable partner for the United States, and only 56% believe that Türkiye is a reliable partner for European countries. Domestic and foreign perceptions diverge significantly for Romania and Lithuania. Respondents in these countries consider them to be reliable partners for the United States (79% in Romania, 83% in Lithuania) and other European states (82% in Romania, 87% in Lithuania), but fewer than half of respondents in other countries see Romania (34%) and Lithuania (42%) as reliable partners.

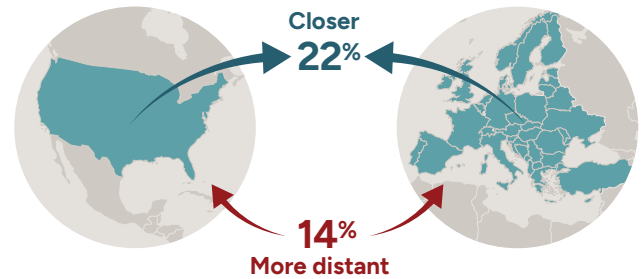
SPOTLIGHT Conservative Party-leaning respondents in the United Kingdom are more likely than the average British respondent (80% versus 71%) to see their nation as a reliable partner for European countries.

Do you think your country is a reliable partner...



Future of US-Europe Relations

A majority of respondents (55%) predict the relationship between the United States and Europe will become neither closer nor more distant in the next five years. Those who anticipate closer relations fell from 27% in 2022 to 22% this year.



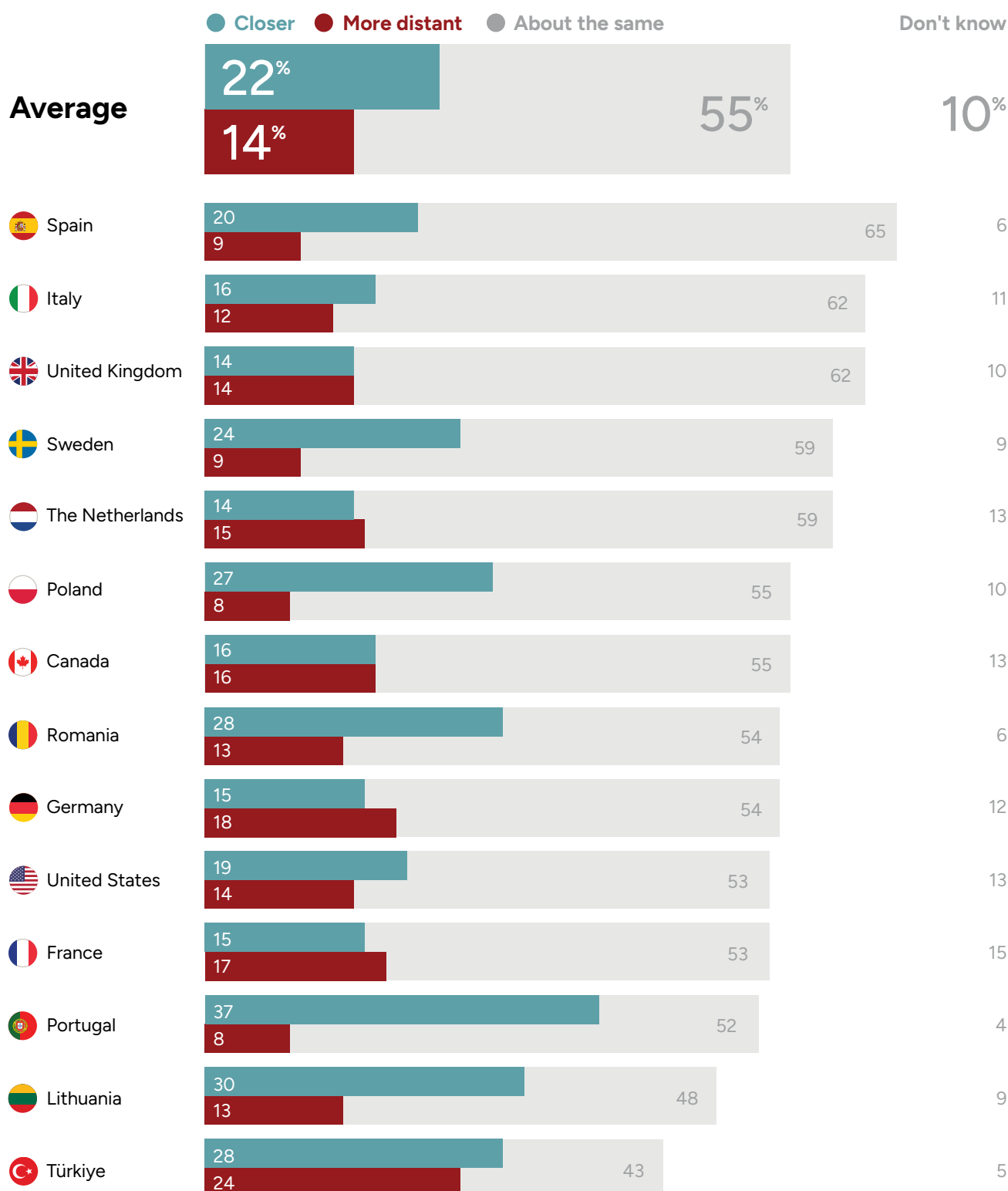
Majorities on both sides of the Atlantic believe the relationship between the United States and Europe will remain stable in the next five years, but considerable differences exist among European publics. In Spain, 65% of respondents, the highest in any nation surveyed, say the relationship will remain stable while only 43% of Turks say the same, the lowest in any nation surveyed. Respondents in Portugal are by far the most optimistic about the future of the relationship, with more than one-third (37%) expecting the transatlantic partnership to become closer in the next five years. They are followed by respondents in Lithuania (30%), Romania and Türkiye (both 28%), and Poland (27%). The share predicting a deteriorating relationship is highest in Türkiye (24%), followed by Germany (18%), France (17%), and Canada (16%).

Publics have become in the past year less optimistic about the transatlantic relationship's trajectory. The drop in respondents anticipating a closer relationship correlates in most cases with an increase in those predicting the relationship will remain as it now is. This shift is particularly visible in Romania, where the share of respondents who believe that the relationship will be closer plummeted 13 percentage points (41% to 28%), while the share of those anticipating the relationship will become neither closer nor more distant increased by 12 percentage points. A similar trend is seen in Spain (-11 percentage points for those seeing closer relations), Poland (-10 percentage points), and Germany (-9 percentage points). Even among the Portuguese, the most optimistic among all publics covered in the survey, the share who believe that the relationship will

become closer is down 9 percentage points. However, the shares of respondents who believe that the relationship will become more distant in the next five years remained stable since 2022; the highest increases in the last year amount to only 3 percentage points in Germany and Spain.

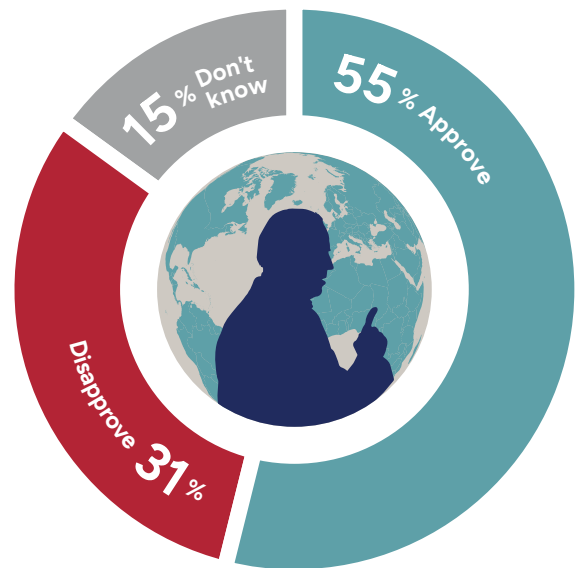
SPOTLIGHT Among respondents who lean toward parties represented in the current German government, those who lean toward the Free Democrats (FDP) are the most pessimistic about the relationship between the United States and Europe. More than a quarter of them (28%) predict relations to cool in the next five years. Only 14% of Social Democrat (SPD)-leaning respondents agree, as do 10% of Green-leaning respondents.

In five years do you anticipate relations between the United States and Europe to be...



Approval of US President Biden's Handling of Foreign Policy

The overall perception of US President Joe Biden's handling of international affairs has been stable since last year. The approval rate remains unchanged at 55%; disapproval dropped 1 percentage point to 31%. Among US respondents, the disapproval rate rose slightly. Views among publics of US allies differ significantly.



As in 2022, Polish respondents (30% somewhat approve, 41% fully approve) are the most positive about the Biden's administration handling of global affairs, reflecting the great extent to which the Polish population supports the US response to the Russian invasion of Ukraine. Respondents in Portugal (54% somewhat approve, 15% fully approve) and Lithuania (40% somewhat approve, 28% fully approve) also express a high level of satisfaction, while those in Romania have become more critical over the past year. Approval there now stands at 57%, a 9-percentage-point drop over the past year. Some of the least positive views, as in 2022, are in Italy (39%), Türkiye (40%), and the United States (44%).

Positive perceptions in Germany and Sweden (both 57%) are down 7 percentage points from 2022 but remain more positive than in France (49%) and the United Kingdom (47%). Spaniards have also become more critical, as fewer respondents there now approve of Biden's foreign policies than disapprove (43% versus 46%), a reversal from last year (50% versus 40%).

US respondents remain deeply divided along political lines and by gender on Biden's handling of global affairs. Fully 76% of Democrat-leaning respondents approve (unchanged from 2022), while 78% of Republican-leaning respondents disapprove (up 5 percentage points from 2022). Independent voters are generally critical, with 53%

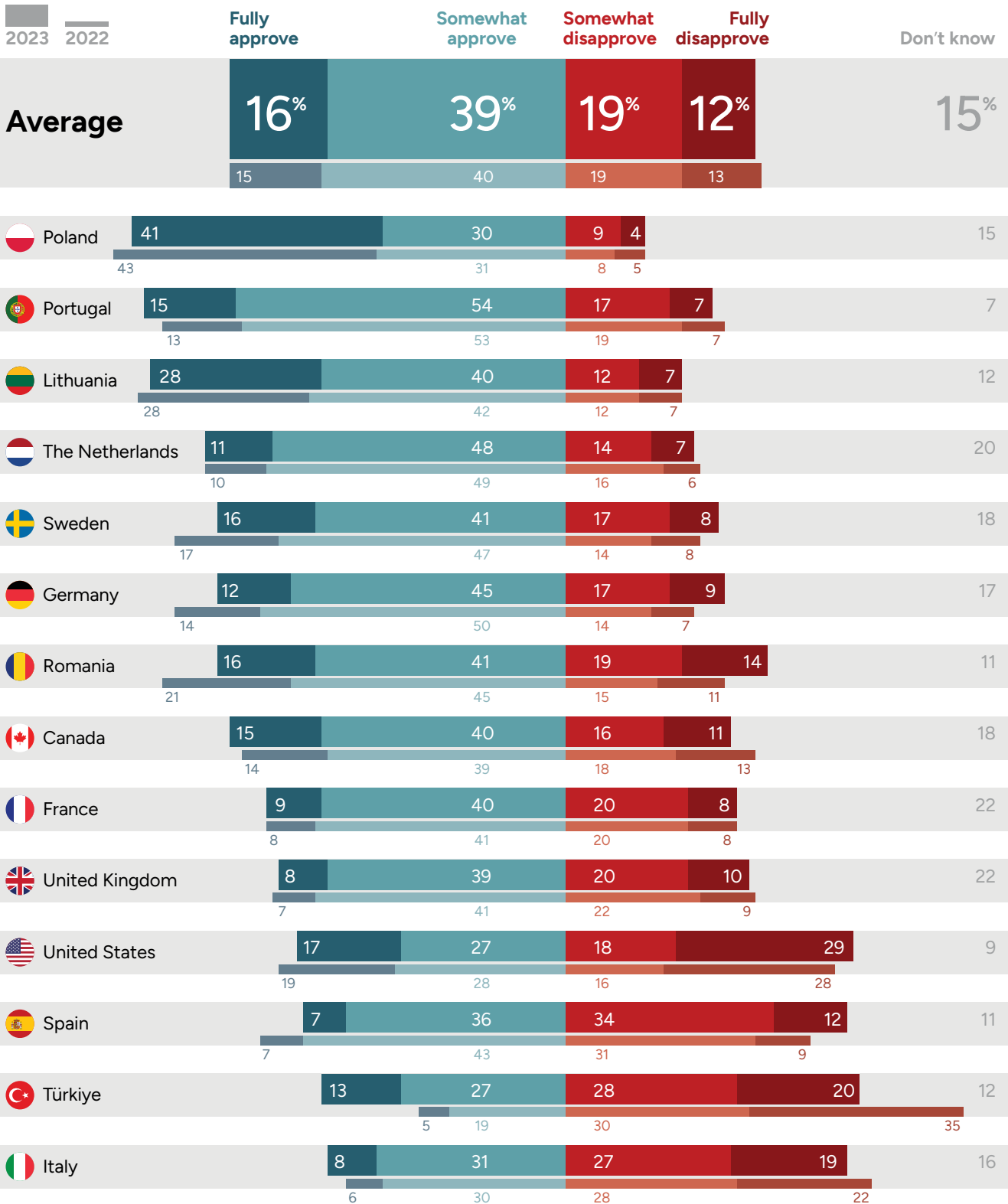
offering a negative opinion and 38% a positive opinion. Male respondents express more approval (49%) than female respondents (39%).

Similarly, men in Germany (64%), France (55%), and the United Kingdom (52%) are more likely to approve of US action in the world than women (51%, 45%, and 43%).

Generational divides are more difficult to identify. Respondents over 65 in Canada, Germany, and Sweden are more supportive of Biden's foreign policy than those aged 18 to 24. There is a 20-percentage-point gap between the two groups in all three countries. The opposite is true in Italy, where 41% of those 65 and older approve compared to 48% of those between 18 and 24. There are no generational divides of note in France, Spain, and the United States.

SPOTLIGHT Turkish respondents remain the most critical among those polled of Biden's handling of international affairs. Still, the approval rate has greatly improved since last year, rising 16 percentage points to 40%. Disapproval has dropped 17 percentage points to 48%.

Do you approve or disapprove of the way U.S. President Joe Biden is handling international affairs?



Security and Defense



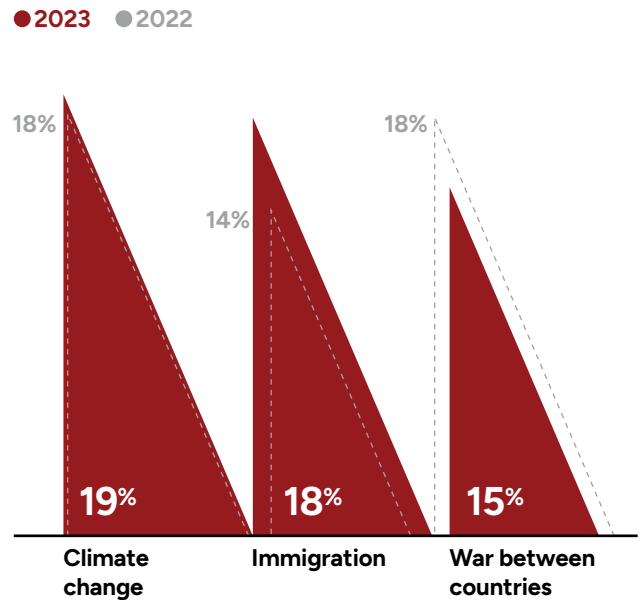
Most Important Security Challenge

Climate change, immigration, and war between countries are the top security challenges for a majority of transatlantic publics, but Russia is seen as the top security threat in countries nearer Ukraine.

Climate change is, on average (19%), seen as the top security challenge in 2023, but results vary greatly among the 14 countries surveyed. While 35% of respondents in Italy, 31% in Portugal, 29% in Spain, and 27% in Canada and France see climate issues as the primary security challenge for their country, only 14% of respondents in the United States, 9% in Türkiye, and 5% in Lithuania share that opinion.

Immigration is the top security challenge for 18% of all respondents, although it is a far greater concern in Türkiye (43%) and Germany (27%) than in Romania (7%) and Lithuania (6%).

The options “war between countries” and “Russia” also rank high in 2023, especially in countries further east, but even there the concerns have declined since 2022. Lithuania and Poland are the only countries in which a plurality of respondents see Russia as the most important security challenge. In Lithuania, 36% have that view (down 6 percentage points from 2022). In Poland it is 27% (down 8 percentage points from 2022). On the other end of the spectrum, only 7% of French respondents (down 1 percentage point from 2022), 5% of US respondents (down 5 percentage points from 2022), and 1% of Turkish respondents (down 2 percentage points from 2022) see Russia as the most important security challenge.



Political divides play a significant role in the perception of immigration as a security challenge. Nearly one-quarter (24%) of Republican-leaning US respondents see immigration as the most critical national security issue while only 7% of Democrat-leaning respondents do. In Europe, the greatest margins between right- and left-leaning respondents appear among respondents in Germany (37% versus 13%), Sweden (26% versus 8%), and the United Kingdom (25% versus 8%).

Left-leaning respondents, however, are more likely than their right-leaning compatriots in a majority of countries surveyed to view climate change as the most important security challenge. The political divide is greatest in Italy (56% versus 24%), Spain (42% versus 18%), and France (43% versus 19%).

SPOTLIGHT More than three years after the COVID-19 outbreak, pandemics are not seen as an important security challenge by European and North American publics. Only 3% of all respondents view pandemics as the top security issue, and 6% as the second-most important.

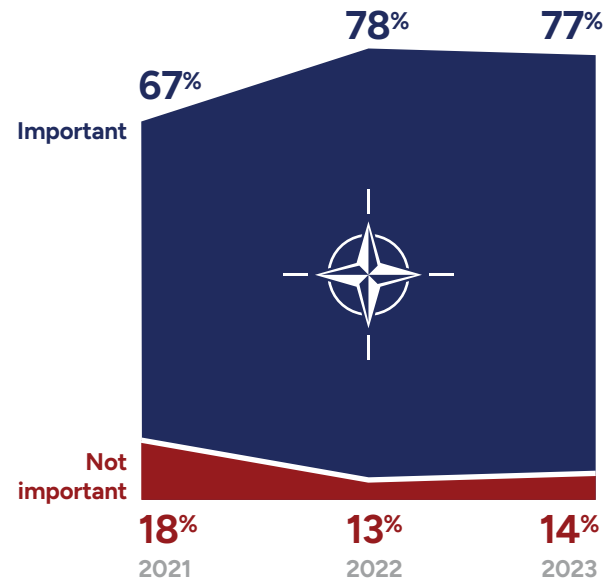
What is the most important security challenge for your country to address in the years to come?

■ 2023 ○ 2022



Importance of NATO for National Security

More than three-quarters (77%) of respondents say that NATO plays an important role in the security of their country, down only 1 percentage point from the past year. The result confirms a shift in sentiment in favor of NATO seen last year, shortly after the Russian invasion of Ukraine.



The share of people on both sides of the Atlantic who see NATO as “very important” to their national security leaped by 20 percentage points, to 46%, between 2021 and 2022. It is barely changed (45%) in 2023, confirming the significant shift triggered by Russia’s invasion of Ukraine.

Respondents in Lithuania (77%) are the most likely to consider NATO very important to their country’s security, followed by Portugal (63% very important, 26% somewhat important) and Poland (60% very important, 27% somewhat important). Majorities in Romania (59% very important, 26% somewhat important) and the Netherlands (51% very important, 28% somewhat important) have the same view. Over three-quarters (78%) of respondents in Germany and the United Kingdom also see NATO as either very important or somewhat important to their nation’s security.

French public opinion is, comparatively, less solidly behind NATO. About two-thirds (67%) of respondents in France say that the alliance is very or somewhat important, a decrease of 5 percentage points from 2022 but still 15 percentage points higher than in 2021. Fully 69% of respondents in Sweden, whose accession to NATO is underway, and Italy believe NATO is very or somewhat important to national security. The most significant shift in public opinion on this issue has occurred in Türkiye, where 77% of respondents see NATO as very or somewhat important, a 12-percentage-point jump since last year.

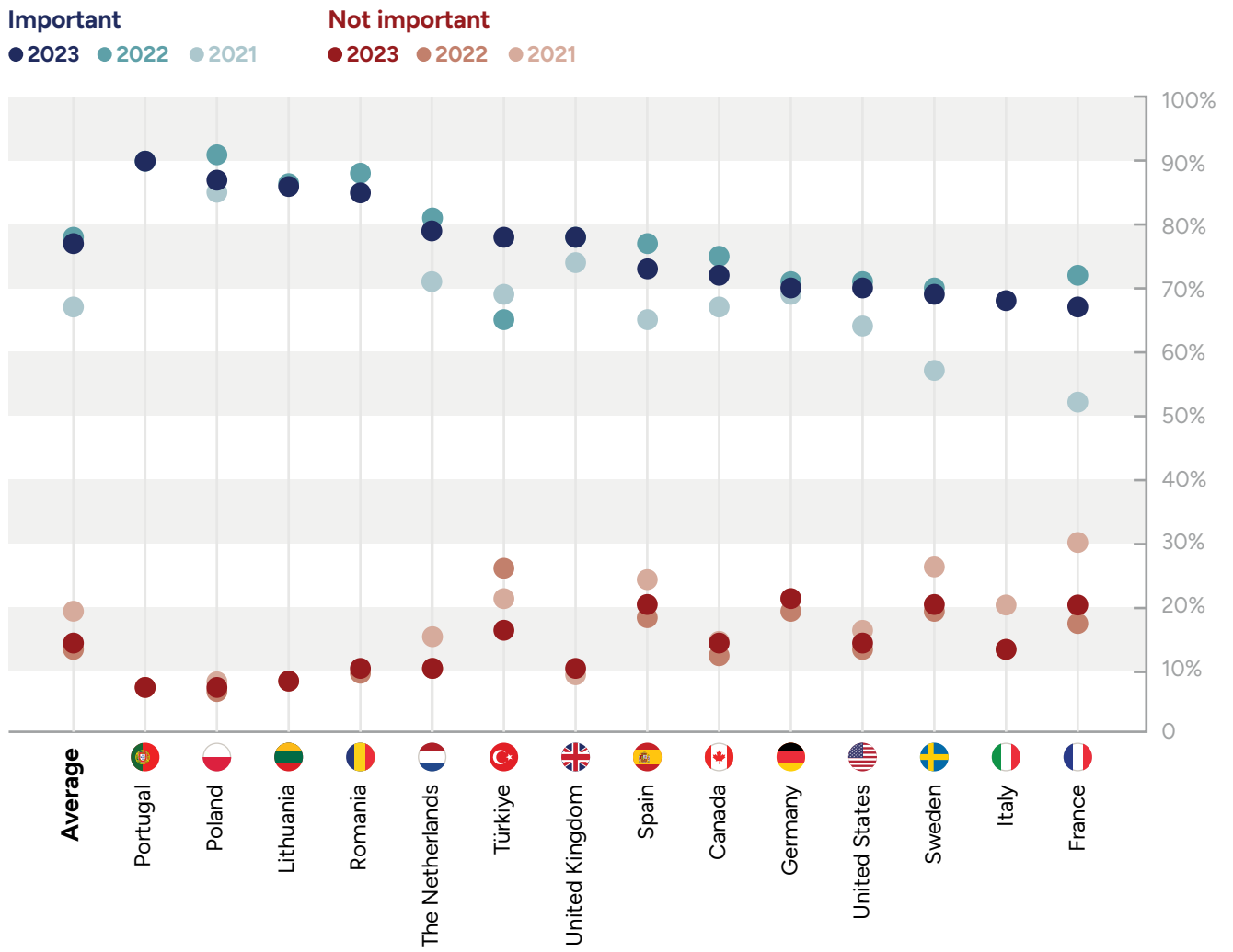
In North America, 72% of respondents in Canada and 70% of respondents in the United States say that NATO is very or somewhat important to their national security, in line with 2022 results (75% and 71%). Noticeable shares of US (16%) and Canadian (14%) public opinion do not know if the alliance is important to national security.

In all 14 countries surveyed, the oldest respondents are much more likely than the youngest to see NATO as very or somewhat important. The generation gap is particularly remarkable in Canada, France, Germany, and the United Kingdom. Nearly two-thirds (64%) of British respondents aged 18 to 24 view NATO as very or somewhat important, far below the 89% of people over 65 who say the same. Appreciation of the alliance’s importance among the youngest respondents in Canada, France, and Germany hovers around 17 percentage points lower than among their oldest cohorts.

SPOTLIGHT Partisan differences on NATO are evident in Germany. Fully 91% of Social Democrat (SPD)-leaning, 90% of Christian Democrat (CDU)-leaning, and 88% of Green-leaning respondents view NATO as very or somewhat important to national security. In contrast, 77% of Die Linke-leaning and 71% of Free Democrat (FDP)-leaning respondents share that opinion.

How important is NATO for the security of your country?

Totals for important (“very important” and “somewhat important”) and not important (“not very important” and “not at all important”)

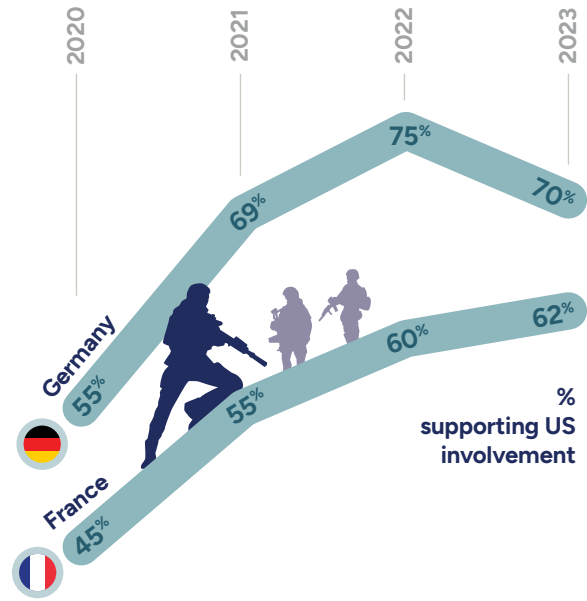


US Involvement in the Defense and Security of Europe

Publics on both sides of the Atlantic are united in their strong support of US involvement in European security and defense. In Türkiye, the desire for US involvement leaped by 15 percentage points over the last year.

Clear majorities for US involvement in European security and defense exist on both sides of the Atlantic. On average, 71% of respondents want to see Washington “greatly involved” or “somewhat involved” in European security, which indicates that overall support has remained stable from 2022 (72%). The most vocal advocates of US involvement are respondents in Poland (86%), Lithuania (84%), and Portugal (82%). The most skeptical, albeit still overall supportive, are respondents in Türkiye (53%), Italy (61%), France (62%), and Spain (63%). In the United States, around two-thirds of respondents (68%) believe that their country should be engaged in European security and defense.

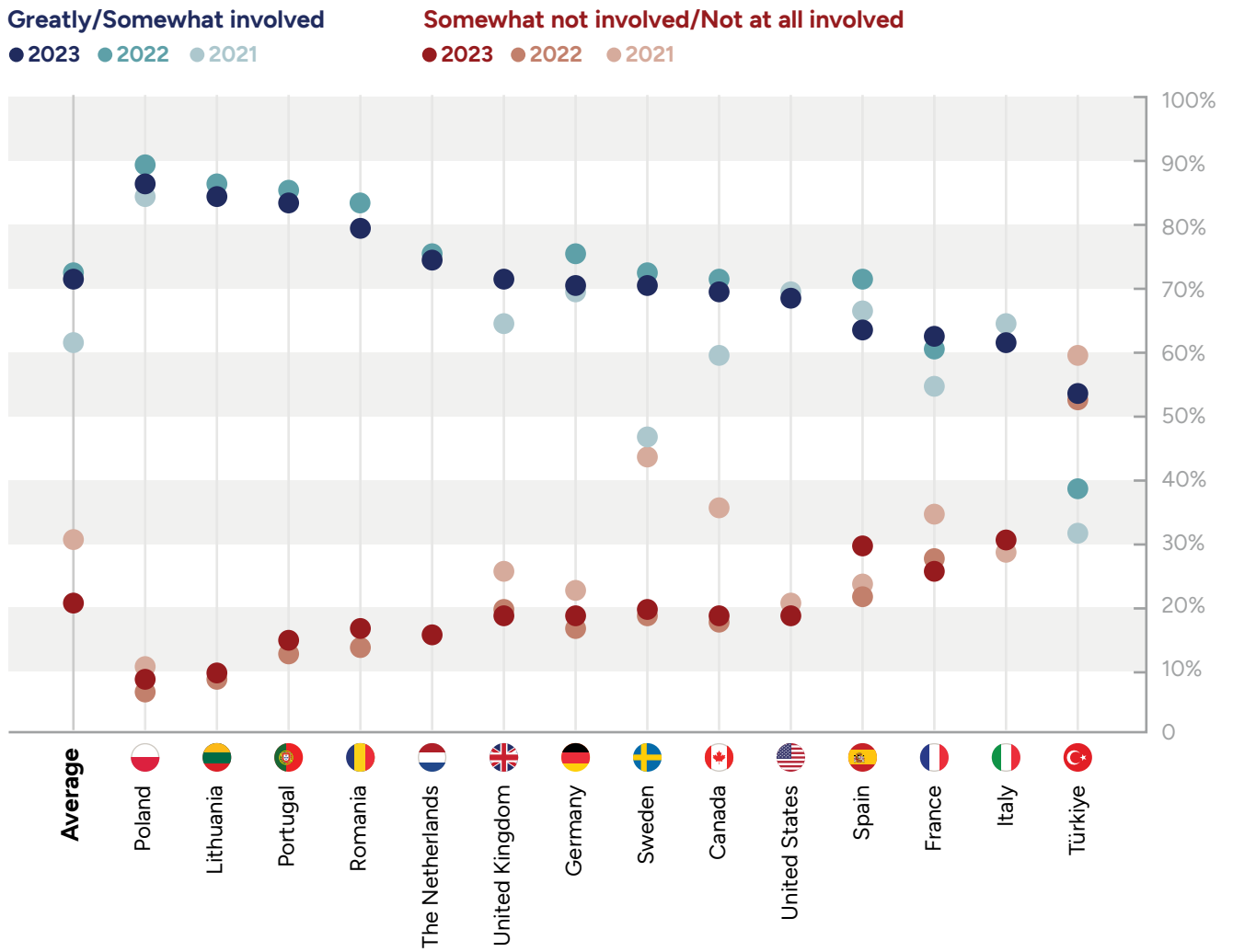
Transatlantic Trends 2022 showed a significant increase in support for US involvement in European security and defense—a 12-percentage-point leap over the year before. Although that overall jump was not replicated in this year’s results, the 15-percentage-point surge in Turkish support for US involvement in European security comes on top of a 7-percentage-point rise recorded last year. Conversely, the Spanish public has become more wary of US involvement. Support there has dropped 8 percentage points to 63%, and 29% of respondents in Spain—exceeded only by 30% in Türkiye and Italy—want to see the US “somewhat not involved” or “not at all involved” in European security and defense. Similarly, German support declined by 5 percentage points, although 70% still approve, almost unchanged from 2021 (69%).



Support for US involvement remains stable or almost stable in most countries surveyed, but the share of respondents who believe that the United States should be “greatly involved” has fallen slightly in nine out of the 14 countries surveyed. It is down 7 percentage points in Germany and 5 percentage points in Lithuania, Romania, and Spain.

SPOTLIGHT Fully 80% of Democrat-leaning respondents in the United States support their country’s involvement in European security and defense, compared to 72% of Republican-leaning respondents. This 8-percentage-point partisan gap is down from 14 percentage points in 2022 (82% versus 68%).

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

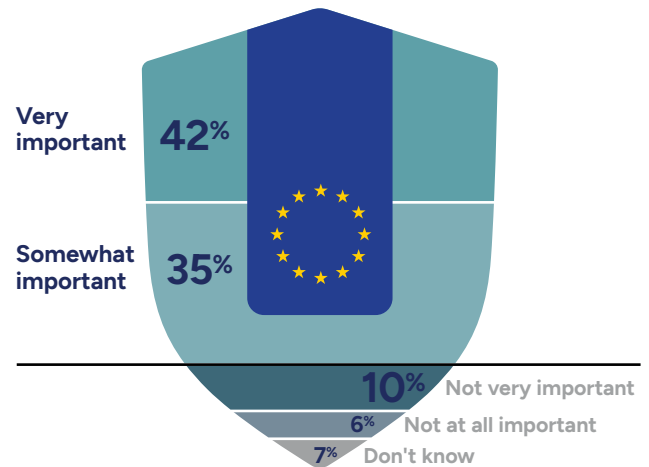


Importance of the EU for National Security

The EU, as in last year's Transatlantic Trends, is seen as important for national security by strong majorities in EU member states, as well as Türkiye and the United Kingdom.

An average of 79% of respondents in the 10 EU member states covered in the survey say that the bloc is “very important” or “somewhat important” for the national security of their country. This result is essentially unchanged from 2022, when 81% of respondents expressed this view. It is most widely shared among those in Portugal (93%), Lithuania (86%), Romania (83%), and Spain (80%). Among EU respondents, those in France and Germany were least likely to describe the EU as important for national security, though a significant share (71% and 73%) believe it is. The French and German view is similar to that in non-member states. Fully 70% in the United Kingdom see the EU as important for national security, slightly higher than the 67% of Turks who share this view.

Views about the EU's importance to national security are mostly unchanged from Transatlantic Trends 2022 findings. The most significant shift is in Türkiye, where the share of respondents that considers the EU important for national security increased 9 percentage points in the last year. In contrast, the number of Poles who see the importance of the EU for their country's security dropped 6 percentage points even if a large majority (78%) still sees the bloc's role as important.

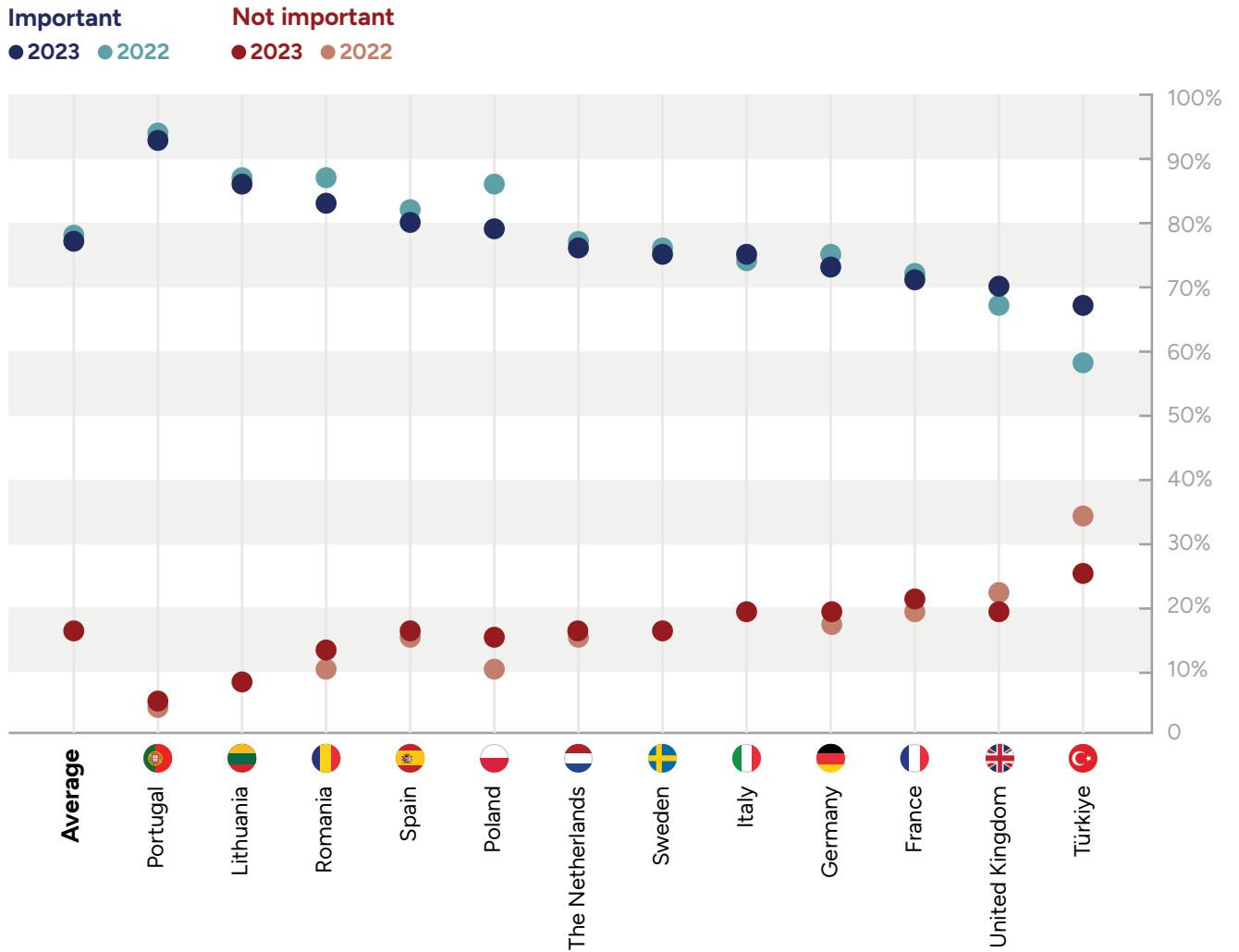


Respondents leaning toward populist or far-right parties in several countries surveyed are much more likely than others to see the EU as “somewhat not important” or “not at all important” for their country's national security. The largest gaps are in Germany (44% of Alternative for Germany (AfD)-leaning respondents versus a national average of 18%), Italy (35% of Lega-leaning respondents versus a national average of 19%), Sweden (31% of Sweden Democrats-leaning respondents versus a national average of 16%), Spain (26% of VOX-leaning respondents versus a national average of 16%), France (31% of Rassemblement National-leaning respondents versus a national average of 21%), and the Netherlands (28% of Party for Freedom-leaning respondents versus a national average of 15%).

SPOTLIGHT In Portugal, respondents leaning toward the two biggest parties almost unanimously agree on the EU's importance for national security: 95% of respondents leaning toward the center-left Socialist Party and 98% of those leaning toward the center-right Social Democratic Party hold this view.

How important is the European Union for the national security of your country?*

Totals for important (“very important” and “somewhat important”) and not important (“not very important” and “not important at all”)



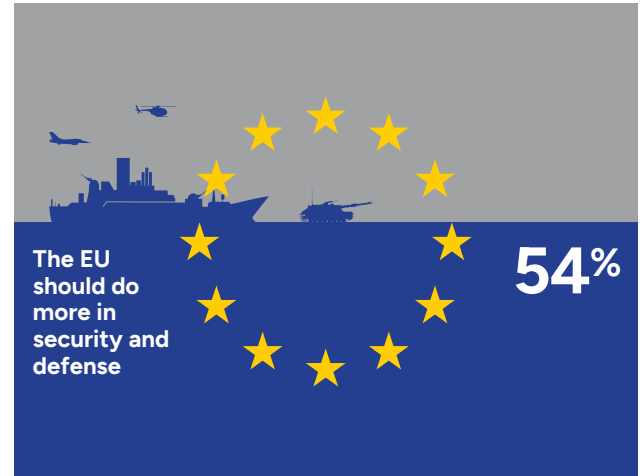
*The question was not asked in Canada and the United States.

The EU's Action on Security and Defense

Majorities or pluralities in EU member states surveyed, and in Türkiye and the United Kingdom, believe that the EU should do more on security and defense, though levels of support vary widely among these countries.

In EU member states surveyed, an average of 54% of respondents believe that the bloc should do more in security and defense, compared to 28% who believe the EU is doing the right amount and 6% who would prefer it to do less. The most enthusiastic for a larger EU role in security and defense are those in Portugal (68%), Lithuania (65%), Romania (62%), and Italy (58%). A similar number of those in Türkiye (66%) shares this view. In contrast, only 41% of respondents, but still a plurality, in Sweden and the Netherlands want a more active EU in security and defense matters. About half of respondents in the United Kingdom (46%), France (47%), Germany (51%), and Spain (52%) agree.

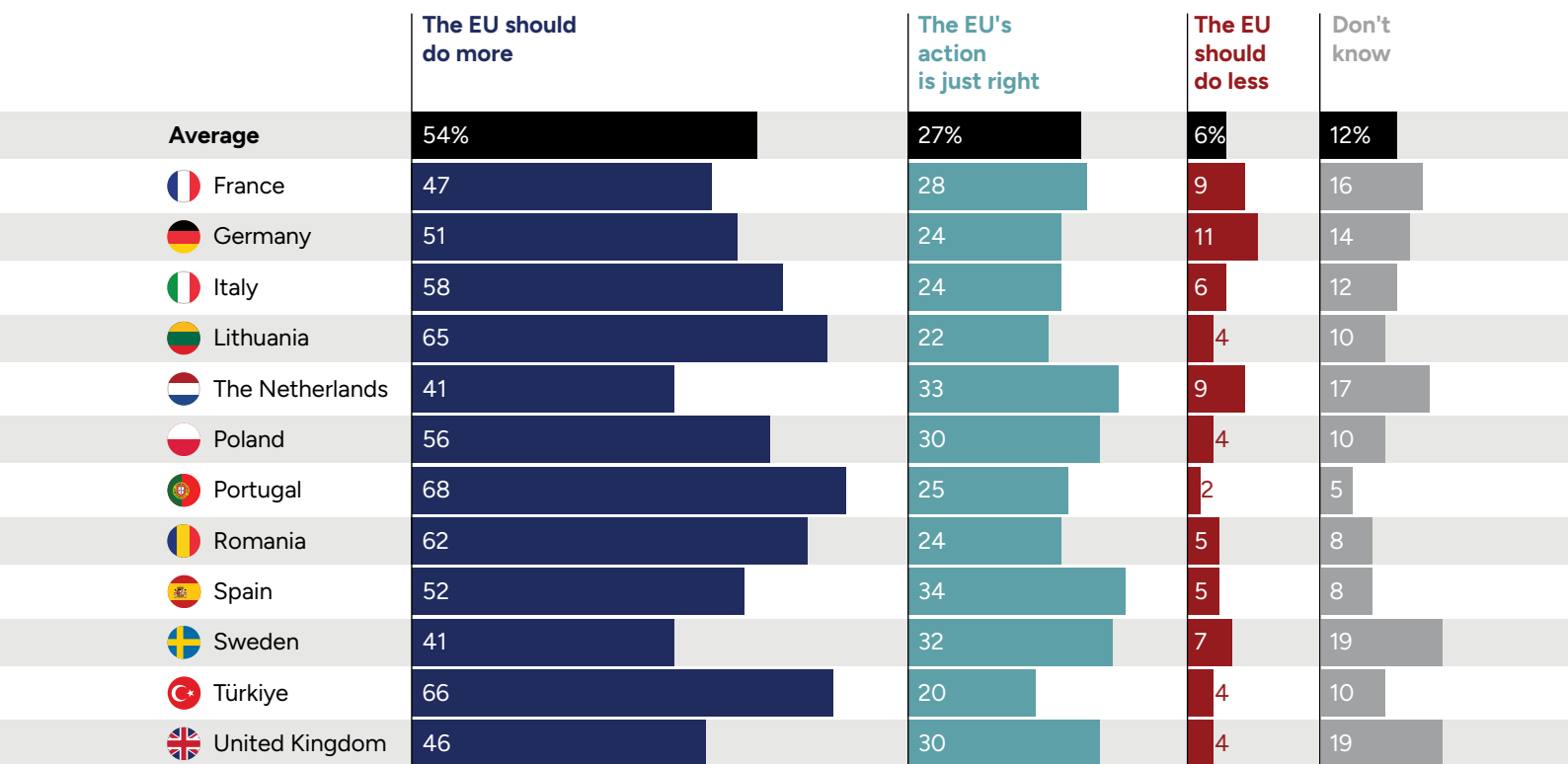
Support for more EU action in security and defense is strongly correlated with age in all countries surveyed. Respondents in the oldest age group are more likely than those aged between 18 and 24 to want the bloc to assume a larger role. The most significant gaps between the oldest and youngest age groups are in France (58% versus 34%), the Netherlands (52% versus 28%), Italy (66% versus 43%), Lithuania (72% versus 50%), and Romania (66% versus 47%). Smaller gaps exist in Poland (14 percentage points), Portugal, the United Kingdom (13 percentage points), Germany, (8 percentage points), and Spain and Sweden (7 percentage points).



A correlation between gender and support for more EU action in security and defense exists in the United Kingdom and France. More than half (53%) of male respondents in both countries want more EU action while 39% of women in the United Kingdom and 42% of women in France agree.

SPOTLIGHT Conservative-leaning respondents in the United Kingdom are more likely than Labour-leaning respondents to say that the EU should do more in security and defense (55% versus 49%).

With regard to security and defense, please tell me which proposed action comes closest to your view:*



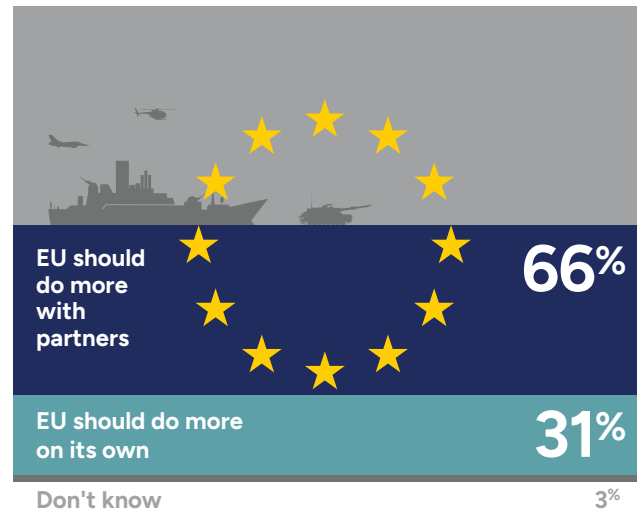
* The question was not asked in Canada and the United States.

Preferred Approaches for Enhancing the EU's Action on Security and Defense

Of those who believe the EU should do more on security and defense, a majority wants the bloc to act with partners. But there are significant variations among the publics surveyed on this issue.

Two-thirds (66%) of respondents in EU member states in favor of more EU action on security and defense indicate that the bloc should do it with partners. Slightly fewer than one-third (31%) want the EU to act more on its own. In the United Kingdom, almost three-quarters of respondents (72%) prefer the EU to do more with partners. One-quarter (24%) say the bloc should do more on its own. A majority (60%) of respondents in Türkiye also support EU partnerships in security and defense while 39% favor the bloc's acting independently—significantly higher than the 31% average of all publics surveyed and in line with findings in the Netherlands (43%), Spain (40%), and Italy (37%).

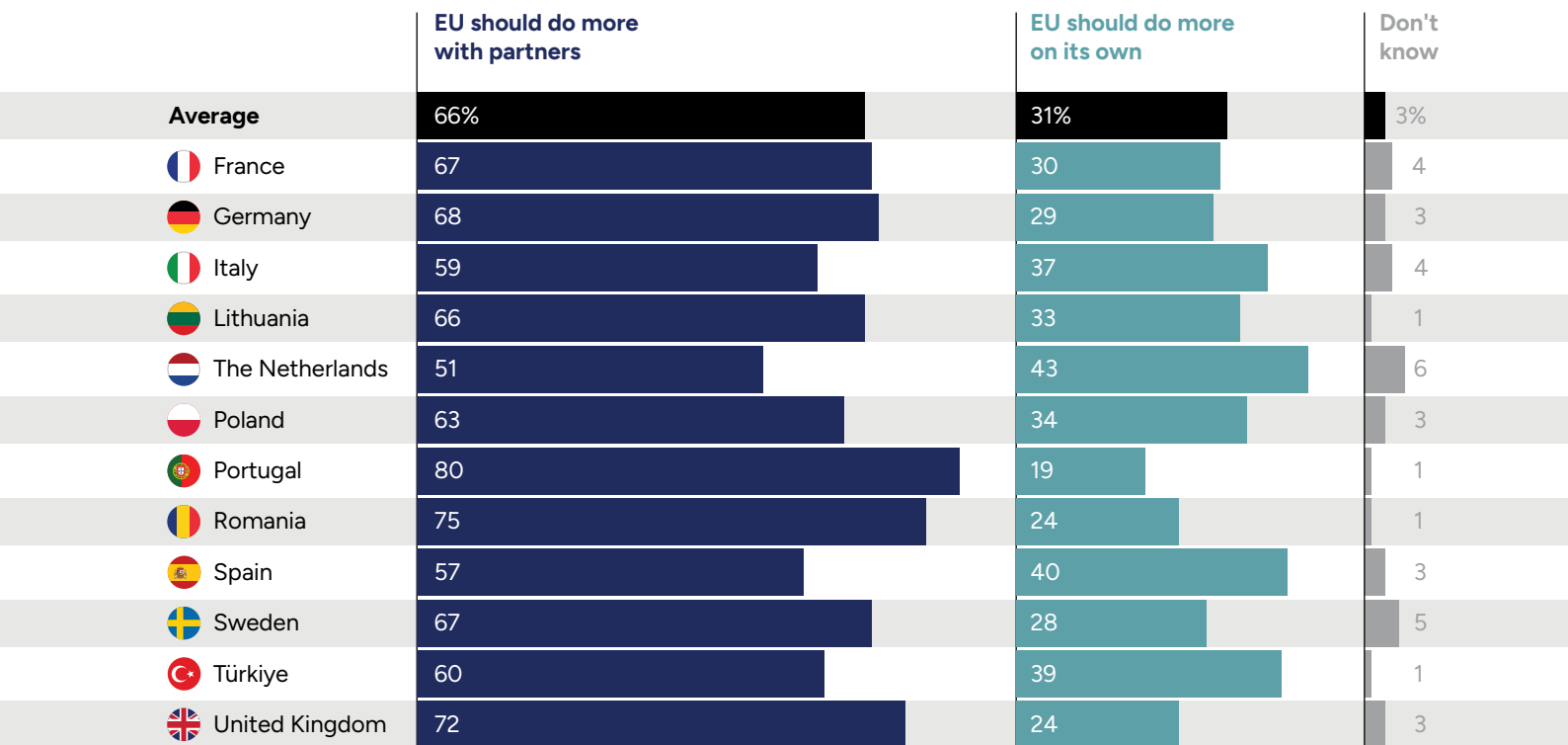
The question on the preferred EU approach to security and defense reveals no major geographic or demographic divisions in public opinion. Differences in location, gender, or age are not correlated with views on the issue.



SPOTLIGHT

While public opinion in Poland diverges considerably from that in France and Germany on many Transatlantic Trends 2023 questions, perspectives on a preferred EU approach to security and defense converge in the three Weimar Triangle countries. Roughly two-thirds of respondents in each want the bloc to work with partners.

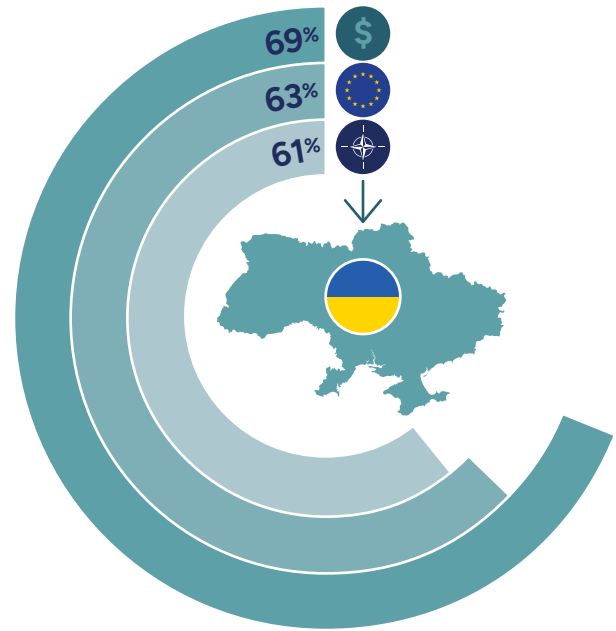
If you want the EU to do more, which approach should be given priority?*



* The question was not asked in Canada and the United States.

Ukraine Policy Options

There is strong support across all countries surveyed for offering NATO membership to Ukraine (61%), offering EU membership to Ukraine (63%), and providing financial support for Ukraine's reconstruction (69%). German respondents are the least enthusiastic about all three options.



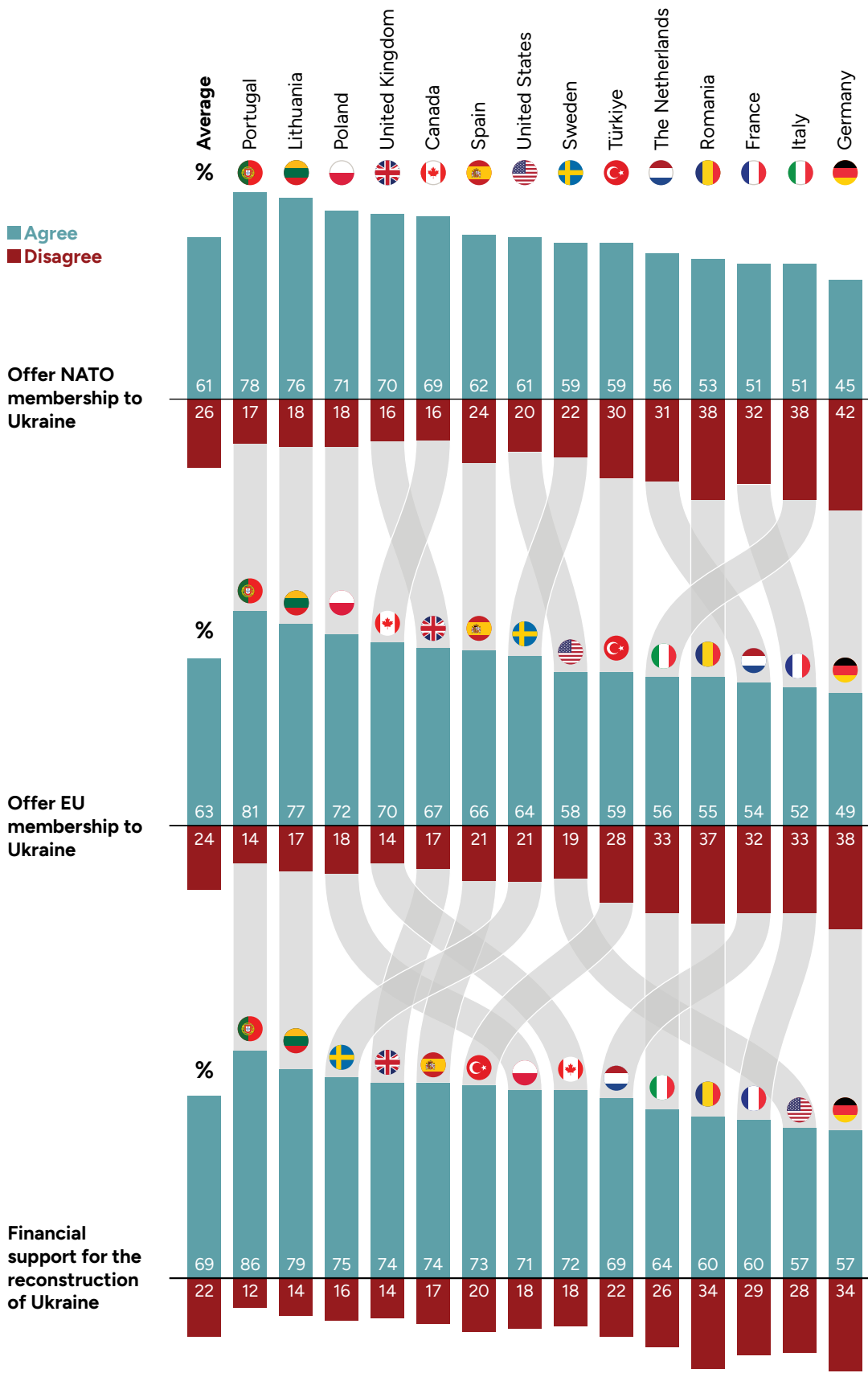
Publics on both sides of the Atlantic overwhelmingly back assisting Ukraine. Almost seven out of 10 respondents across all countries surveyed agree with their governments' providing financial support for Ukraine's reconstruction (69%). Agreement is particularly high in Portugal (86%), Lithuania (79%), Sweden (75%), the United Kingdom and Spain (both 74%), and Türkiye (73%). It is relatively low in France (60%), the United States (57%), and Germany (57%). Respondents in France and Germany are also among the least supportive of offering EU membership to Ukraine (52% and 49%), but public opinion in EU member states is divided on this issue. Respondents in Italy (56%), Romania (55%), and the Netherlands (54%) closely align with respondents in France and Germany, while respondents in Portugal (81%), Lithuania (77%), and Poland (72%) are the most supportive. EU membership is not a determining factor for public opinion on this question; respondents in Canada and the United Kingdom are strongly in favor (70% and 67%), whereas Turkish and US respondents are less so (59% and 58%).

Offering NATO membership to Ukraine is backed by majorities in all countries surveyed except Germany. Only 45% there endorse this move, just slightly more than those against it (42%). French and Italian respondents are only slightly more supportive (both 51%). In contrast, high shares of the public in Portugal (78%), Lithuania (76%), Poland (71%), and the United Kingdom (70%) agree with offering Ukraine NATO membership. More than half of Lithuanian respondents (53%) even say that they "strongly support" offering membership.

Publics that exhibit low support for all three options for assisting Ukraine are also politically polarized on the issues. For example, 73% of Democrat-leaning respondents in the United States want to offer financial support for Ukraine's reconstruction, and 75% want to offer NATO membership. That contrasts sharply with the views of Republican-leaning respondents, among whom support for these options is between 15 and 20 percentage points lower. A similar pattern is seen in Germany, where respondents who lean toward the Greens, the Social Democrats (SPD), or the Christian Democrats (CDU) overwhelmingly support offering Ukraine financial assistance for reconstruction, NATO membership, and EU membership. Respondents leaning toward the far-right Alternative for Germany (AfD), however, take a dim view of each offer.

SPOTLIGHT Respondents in France who lean toward the governing Renaissance party are the strongest advocates of offering Ukraine NATO membership (69%), EU membership (69%), and financial support for reconstruction (80%). Respondents who lean toward the far-right Rassemblement National are split on offering Ukraine financial support for reconstruction (48% agree, 42% disagree) and NATO membership (41% agree, 45% disagree), while disapproval of offering EU membership (50%) clearly exceeds approval (40%).

There is a number of possible actions that your country and its partners could take in the face of the Russian invasion of Ukraine. For each of the following, please indicate how you feel about the proposed action.

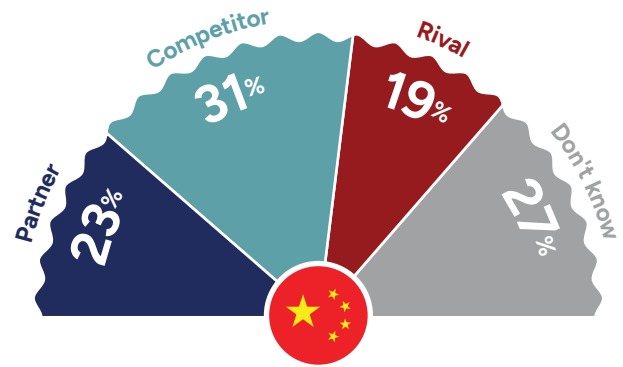


China



Bilateral Relationships With China

Respondents are divided on assessing China as a partner, competitor, or rival for their country, and considerable shares are uncertain about classifying the relationship at all.



Transatlantic public opinion on the relationship with China has changed little since 2022. Significant division on describing the relationship persists, mirroring its complexity. On average, a plurality of respondents (31%) see China as a competitor. Fewer than one-quarter (23%) see it as a partner, and around one in five (19%) view it as a rival. US respondents are most likely to describe their country's relationship with China as a rivalry (34%). In Romania, 45% of respondents see China as a partner. The perception of China as a competitor is highest in Germany (44%), France (40%), Italy (39%), and Spain (38%). Overall, a considerable share of respondents (27%) say that they do not know whether China is a partner, competitor, or rival for their country. The uncertainty is greatest in Sweden and Lithuania (both 40%), followed by Poland (37%).

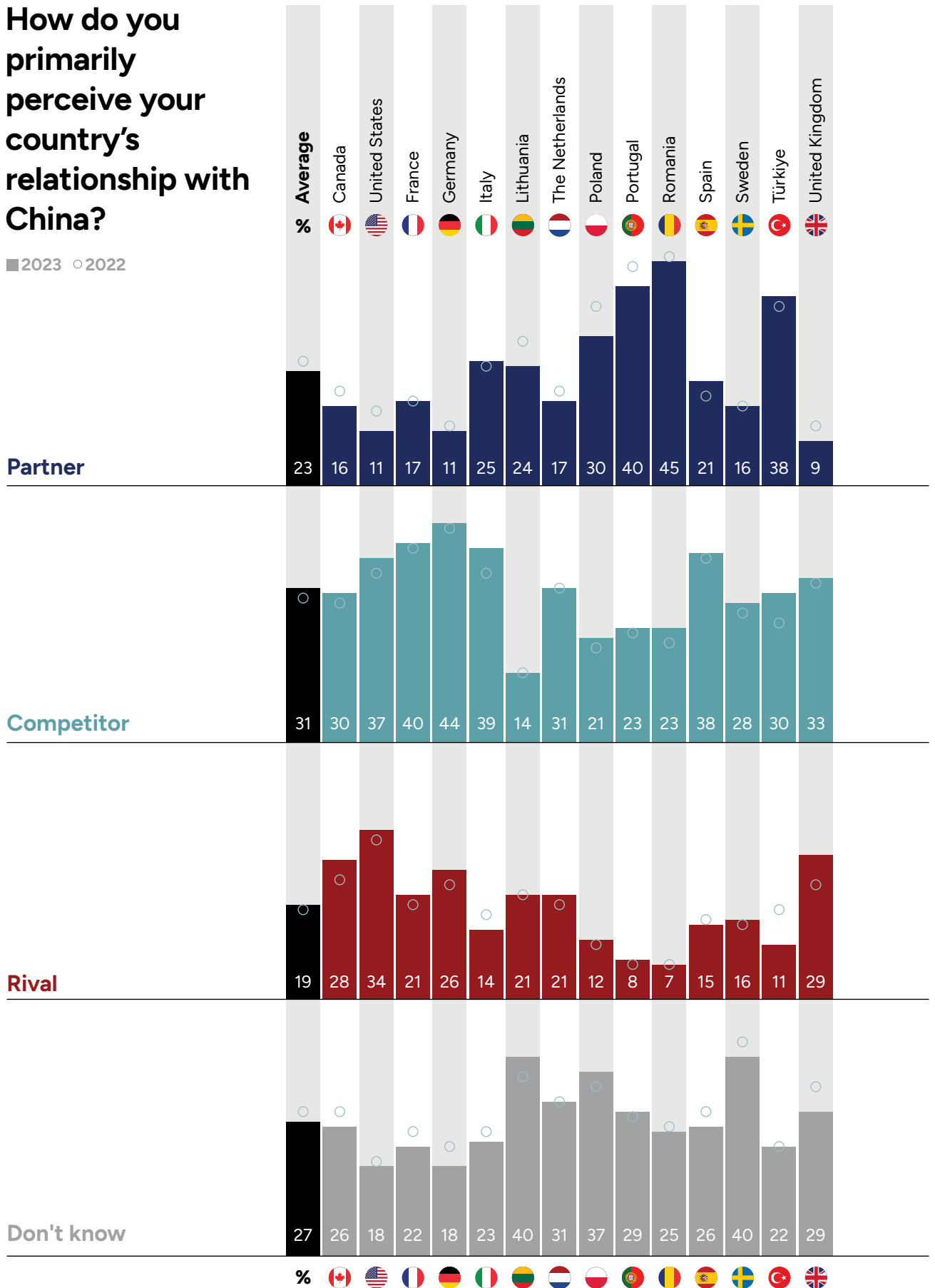
Despite the overall stability, since last year, in perceptions of bilateral relationships with China, some changes have emerged. The British public is now more likely (up 6 percentage points to 29%) to see China as a rival than last year. At the same time, the share of UK respondents unsure how to classify the relationship has decreased 5 percentage points. Fewer respondents in Poland describe China as a partner compared to last year (down 6 percentage points to 30%), a result similar to that in Lithuania (down 5 percentage points to 24%). In contrast, respondents in Türkiye are now less likely than in 2022 to describe their country's relationship with China as a rivalry (down 7 percentage points to 11%), while the shares of respondents seeing China as a competitor or partner for their country have increased (up 6 and 2 percentage points, respectively, to 30% and 38%).

Perceptions of bilateral relationships with China correlate with age in 10 of the 14 surveyed countries, but no pattern across countries exists. The youngest respondents, aged 18 to 24, are much more likely than the oldest respondents in the same country to describe China as a partner in the United Kingdom (12% versus 4%), Canada (24% versus 9%), the United States (16% versus 2%), the Netherlands (25% versus 13%), Sweden (23% versus 15%), and Germany (19% versus 8%). The opposite is the case in Romania (30% versus 56%), Poland (15% versus 33%), Portugal (25% versus 47%), and Türkiye (29% versus 41%), all countries in which the public, on average, holds more positive views of their nation's relationship with China.

SPOTLIGHT In the United States, there is no partisan divide in the assessment of China as a partner. Only 12% of Republican-leaning respondents and 12% of Democrat-leaning respondents have this view. However, Republican-leaning respondents are more likely than Democrat-leaning respondents to see China as a rival (48% versus 29%). The opposite is true for those who see China as a competitor (31% versus 46%).

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

■ 2023 ○ 2022



Preferred Approach Toward China

Pluralities in most countries want their government to be tougher on China on human rights, but cooperation is the preferred policy approach for new technologies, trade, and energy and supply of raw materials.*

The approach respondents want their country to take toward China varies significantly across policy areas and by demographic. Respondents on both sides of the Atlantic, however, favor a tougher approach on human rights. On average, 49% want their country to take such a stance. Respondents most strongly in favor of this are in Portugal (63%), France and Sweden (both 62%), and the United Kingdom and the Netherlands (both 56%). In contrast, only 25% of respondents in Romania and Türkiye share this view. The Romanian result is notable as it plummeted from 50% in 2022. The policy area in which most respondents support cooperation with China is new technologies (40%), followed closely by trade (35%). More than half of Turkish respondents (71% for cooperating on new technologies and 66% for cooperating on trade) and Romanian respondents (60% and 55%) have this view. Canadian respondents are the least supportive of cooperation in either area (26% and 23%).

Overall, publics' preferences for their country's approach toward China have shifted since 2022, with a notable surge in a willingness to work more closely with Beijing. Still, in many policy areas, there is a transatlantic divide in public opinion on the best approach toward China. On climate change, 43% of European respondents favor a tougher approach, compared to 36% of US respondents. A similar pattern emerges for human rights, on which European respondents are more inclined to a tougher approach with China than their US counterparts (51% versus 47%). In contrast, European respondents are more likely than US

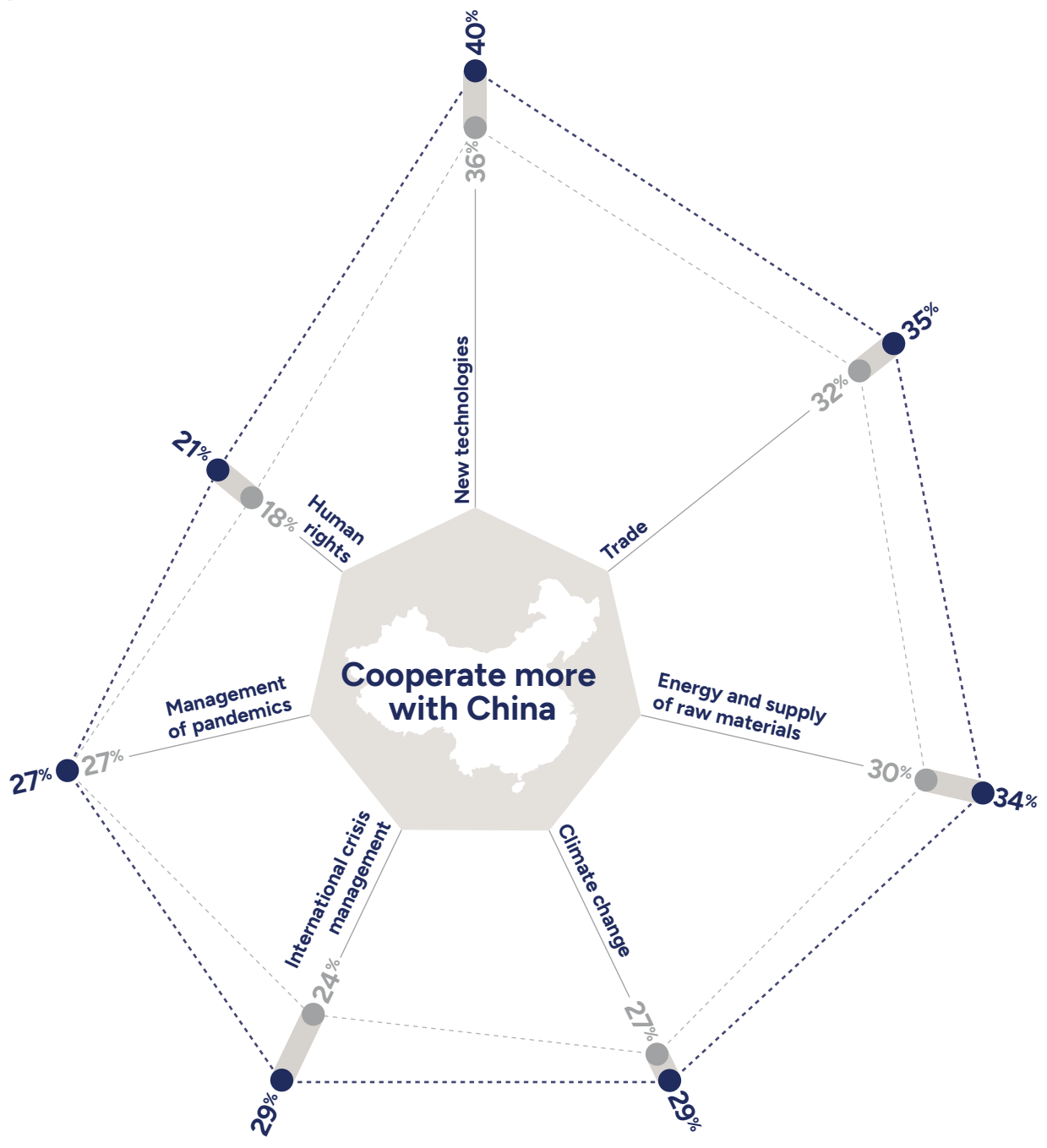
respondents to support cooperation with China on new technologies (40% versus 28%), trade (34% versus 26%), and energy and supply of raw materials (33% versus 25%).

SPOTLIGHT As in 2021 and 2022, French respondents are among the most likely to back a tougher approach toward China in all policy areas. Older French respondents are particularly supportive of a tougher approach, while French respondents in the lowest income bracket are the least likely among all those in France to advocate for a tougher approach in any policy area.

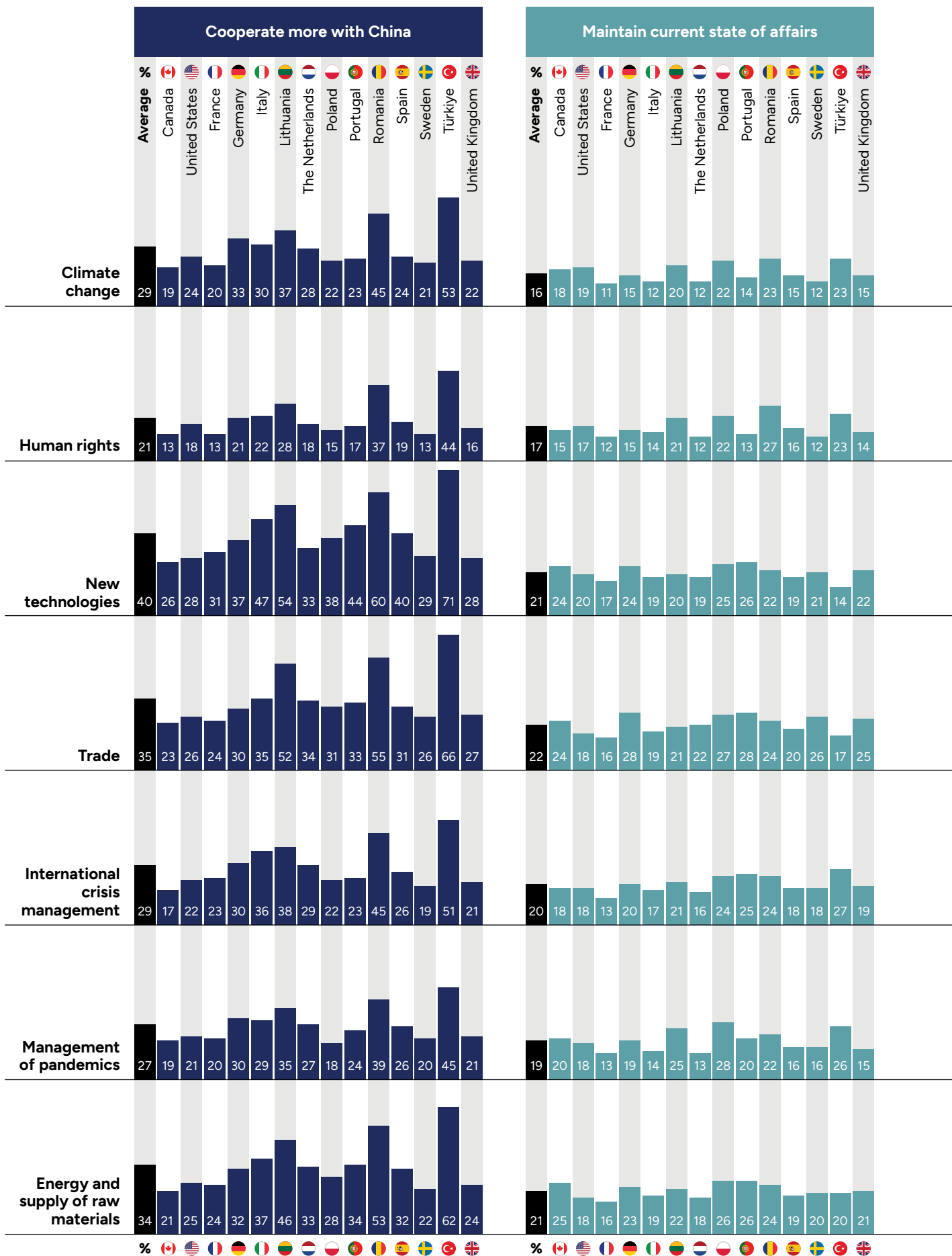
*Methodological note: In 2022, the options "being tougher only alongside partners" and "being tougher regardless of partners' approach" were offered. The two options were merged in 2023.

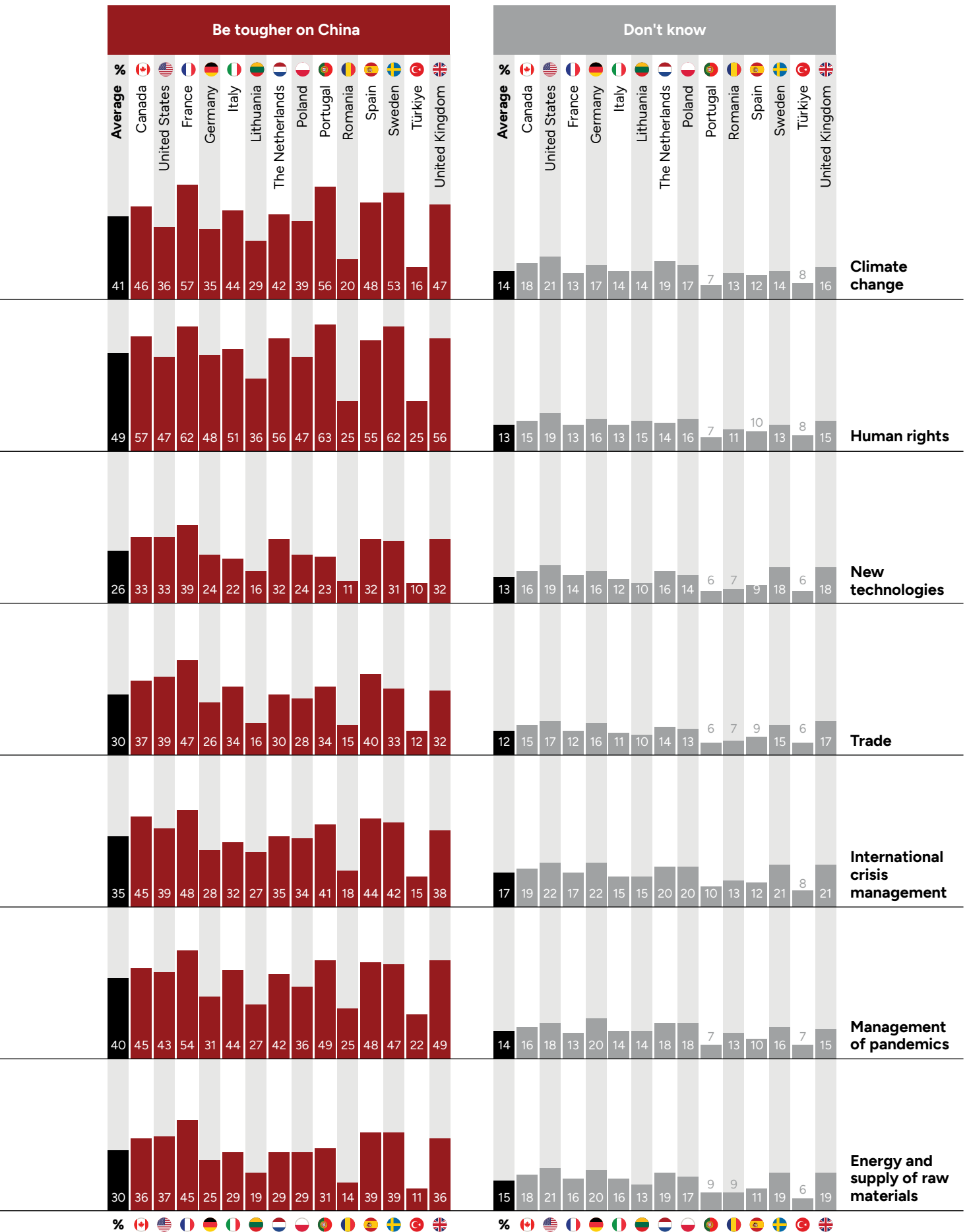
Willingness to cooperate more with China

● 2023
● 2022



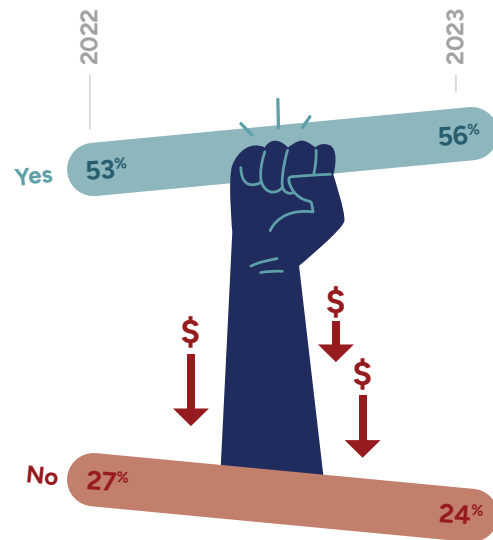
How do you think YOUR COUNTRY should approach China regarding the following issues?





Tougher Approach on China Regardless of Negative Economic Impact

A majority (56%) of respondents who favor a tougher approach by their country to China continue to hold this view even if it has a negative economic impact on their country.



Respondents who prefer a tougher China policy stand by their preference even if there is an economic cost. This is particularly clear in Spain (63% hold to their position), Sweden (61%), and the Netherlands (60%). On the other hand, the prospect of negative economic implications for their country is more likely to make respondents in Lithuania, Romania, and Türkiye reconsider their position. About one-third of respondents in each of those countries say their support for a tougher China policy could erode if there is an economic cost. In Romania and Türkiye, however, the share of respondents who would reconsider has dropped by 18 and 20 percentage points, respectively, since last year.

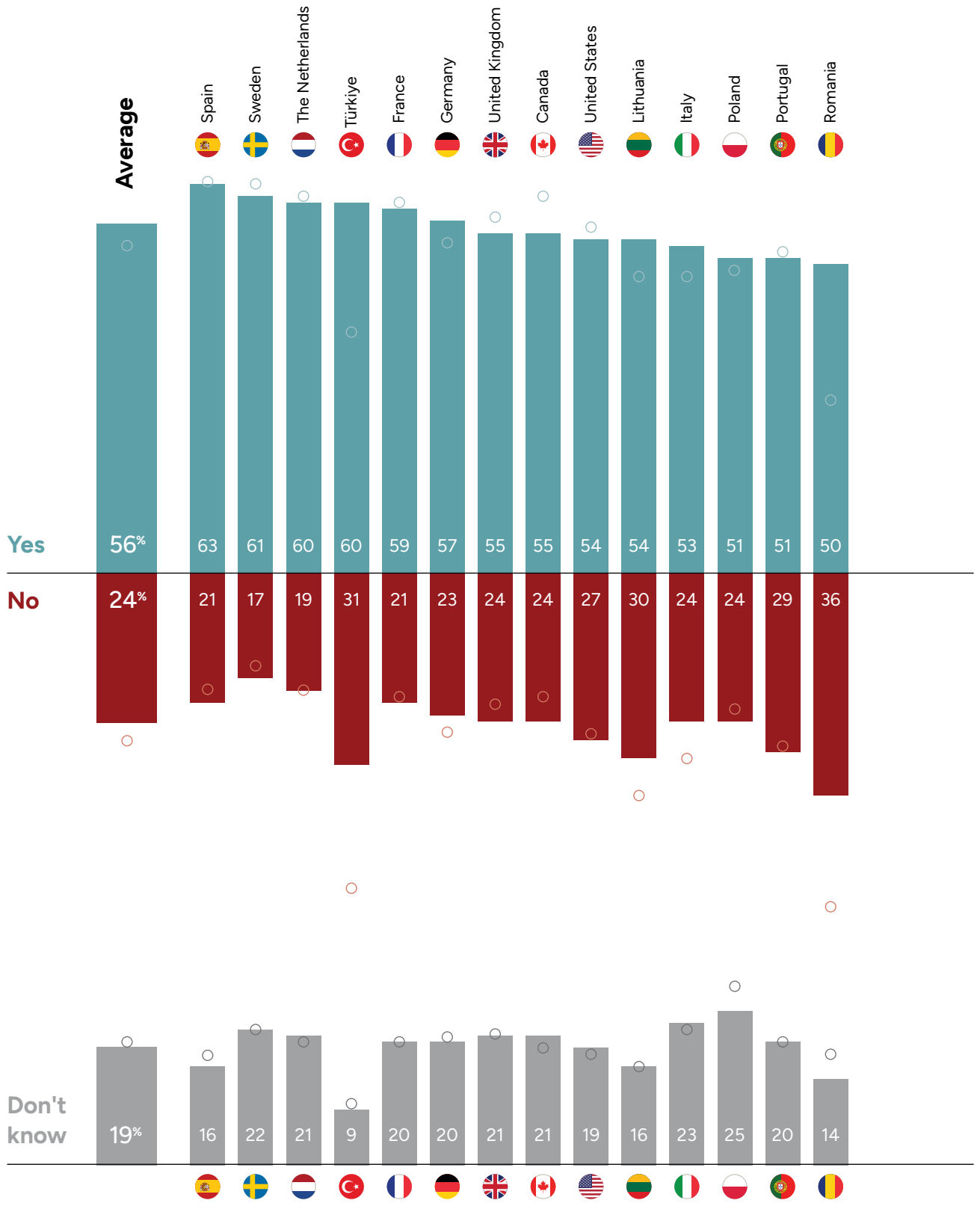
Large shares of respondents admit to not knowing how to answer this question or they did not offer an answer. Fully 25% in Poland, 23% in Italy, and 22% in Sweden did not know if a negative economic impact would lead them to review their preference for a tougher approach to China.

In most countries, older respondents are more likely than younger respondents to say that they would continue to favor tougher policies toward Beijing even if it negatively affected their country's economy. Nearly two-thirds (65%) of US respondents 55 and older would hold to their position while only 44% of those between 18 and 24 would. Similar generation gaps exist in the Netherlands (25-percentage-point difference), the United Kingdom (24-percentage-point gap), and Germany (21-percentage-point difference).

SPOTLIGHT In the United States, Republican-leaning respondents (60%) are more likely than Democrat-leaning respondents (51%) to reaffirm a tougher China policy even if it entails economic cost.

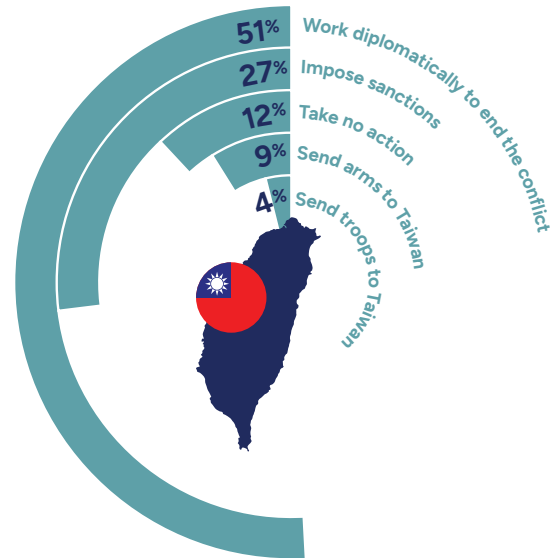
Would you still want your country to be tougher on China even if this had a negative impact on your country's economy?

■ 2023 ○ 2022



Scenario of an Invasion of Taiwan

Most respondents would prefer their country to respond to a Chinese invasion of Taiwan with diplomacy or sanctions. Few would support sending arms or troops to Taiwan.



Publics on both sides of the Atlantic agree on a preference for working diplomatically to respond to a Chinese invasion of Taiwan; a majority of respondents (51%) express support for this position. The largest number of advocates of working only diplomatically to end such a conflict are in Portugal (64%), Türkiye (60%), and Spain (59%). Only Poland (40%) and the Netherlands (38%) lack a majority in favor of responding only with diplomacy. Around one-quarter (27%) of respondents in all surveyed countries would want sanctions imposed, with support for this option highest in the United Kingdom (36%), the Netherlands and Sweden (both 34%), Canada (31%), and Germany (30%). Those in favor of sending arms (9%) or troops (4%) comprise a small minority, even fewer than those who would want no action whatsoever (12%).

Respondents on both sides of the Atlantic largely agree that, if China invaded Taiwan, diplomacy or sanctions are the preferred responses, but divergences in public opinion arise concerning the sending of arms or troops. US, Canadian, and British respondents, however, see things similarly: 16% of British and 15% of US and Canadian respondents would support sending arms, and 10% of US respondents, 9% of Canadian respondents, and 6% of British respondents would support sending troops. In the EU member states surveyed, the military responses are less popular (8% support for sending arms, and 3% support for sending troops). Among these states, the highest levels of support for sending arms are in Sweden (12%) and Lithuania (11%).

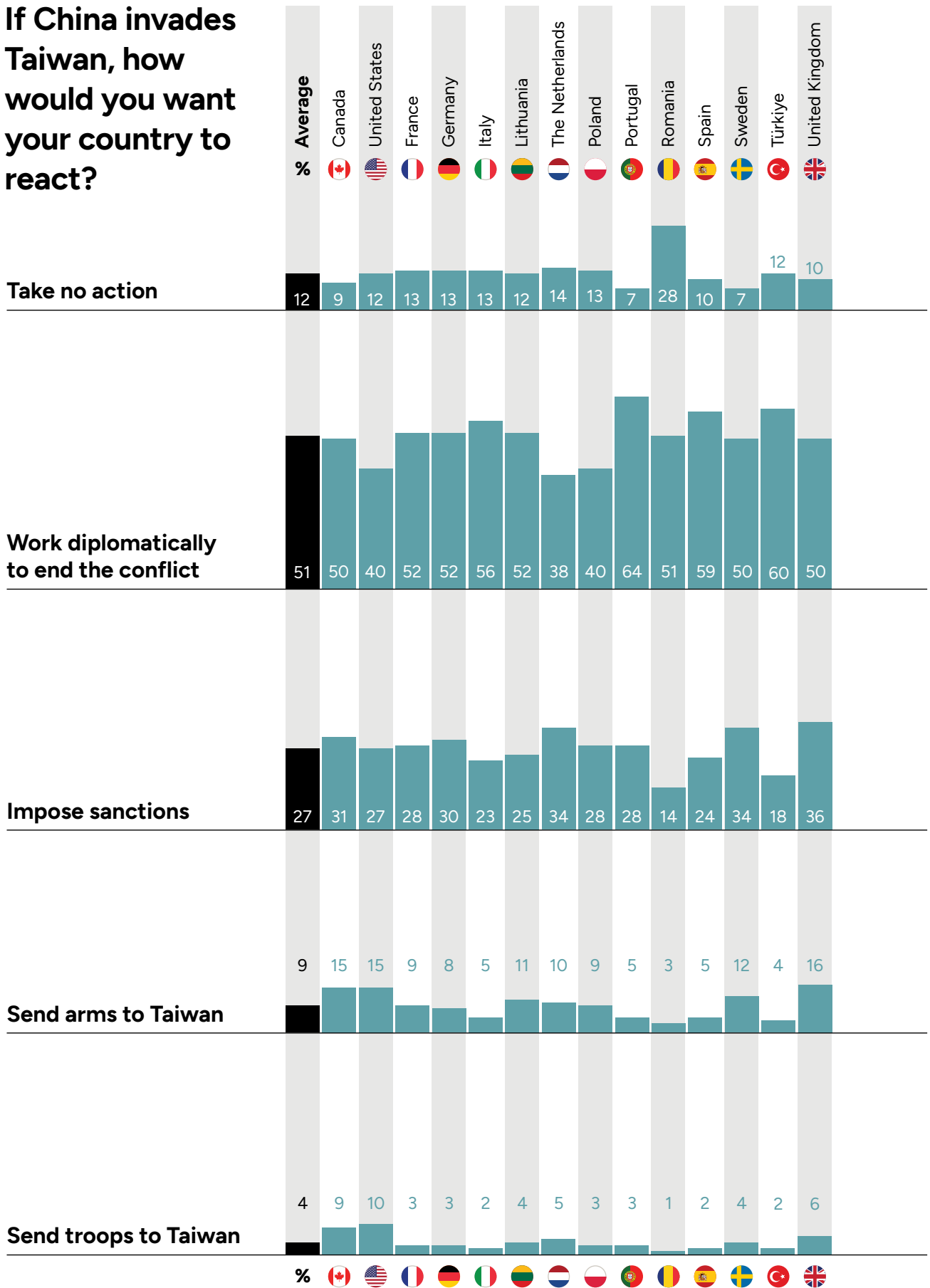
Gender and preferred policy options in case of a Chinese invasion of Taiwan strongly correlate in 11 of the 14 countries surveyed. Men are much more likely than women to support sanctions and sending arms. Regarding the imposition of sanctions, the gender gap is 17 percentage points

(44% men versus 27% women) in the United Kingdom, 16 percentage points in Germany (38% versus 22%), and 15 percentage points in France (36% versus 21%). It is 13 percentage points in Canada, the Netherlands, and the United States, 11 percentage points in Portugal and Sweden, 10 percentage points in Italy, and 9 percentage points in Spain. Similarly, support among men for sending arms, while never close to a majority, equaled or exceeded twice the support among women in the United Kingdom (21% versus 10%), the United States (22% versus 9%), Canada (20% versus 10%), Sweden (17% versus 7%), Poland (12% versus 6%), Germany (12% versus 5%), Lithuania (15% versus 7%), France (13% versus 5%), and the Netherlands (15% versus 6%). The share of women who responded “do not know” was significantly higher than that for men in all these countries.

SPOTLIGHT European respondents who lean toward populist parties are much more likely than others in the same country to want no response to a Chinese invasion of Taiwan. In Germany, about one-third (32%) of Alternative for Germany (AfD)-leaning respondents would want no action, significantly higher than the national average (13%). Results are similar in the Netherlands (22% of Party for Freedom-leading respondents versus a national average of 14%), France (20% of Rassemblement National-leaning respondents versus a national average of 13%), and Spain (17% of VOX-leaning respondents versus a national average of 10%).

*Methodological note: Respondents could choose between “take no action”, “don’t know”, or multiple choices from a list of proposed actions.

If China invades Taiwan, how would you want your country to react?





Global Challenges

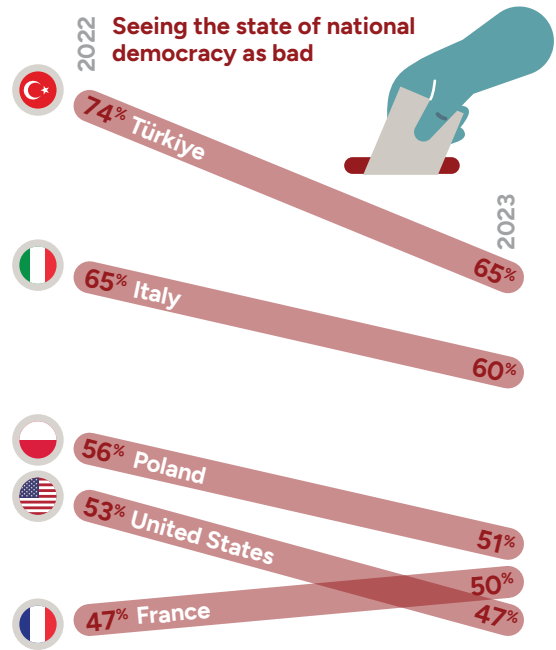
State of Democracy

Respondents' perceptions of the state of their national democracy vary widely within the transatlantic community. Two-thirds (66%) of respondents in Canada and Sweden are satisfied with their country's democracy. Majorities of respondents in Türkiye (65%), Italy (60%), and Poland (51%), however, are dissatisfied with theirs.

An average of only 50% in the 14 countries surveyed consider their democracy to be in good condition. The result is little changed from last year but reflects a great disparity of views among transatlantic publics.

In addition to respondents in Sweden and Canada, clear majorities in Lithuania (62%), Spain (58%), and the Netherlands (55%) see their democracy as somewhat good or excellent. On the other end of the spectrum, a majority of Romanian (51%) and French (50%) respondents, and a plurality of US respondents (47%), have a negative opinion of the state of their democracy. In the United States, however, overall sentiment is more positive than in 2022, when only 38% saw American democracy positively.

Views on the state of their democracy are less positive than last year among respondents in Germany, Sweden, and, especially, Portugal. In 2023, those expressing a positive opinion of their democracy dropped 14 percentage points in Portugal (51% versus 65%) and 6 percentage points in Germany (51% versus 57%) and Sweden (66% versus 72%). In Germany, a striking gender divide exists, with a plurality of female respondents (49%) believing that German democracy is in a bad state while a clear majority of male respondents (58%) disagree with that stance.

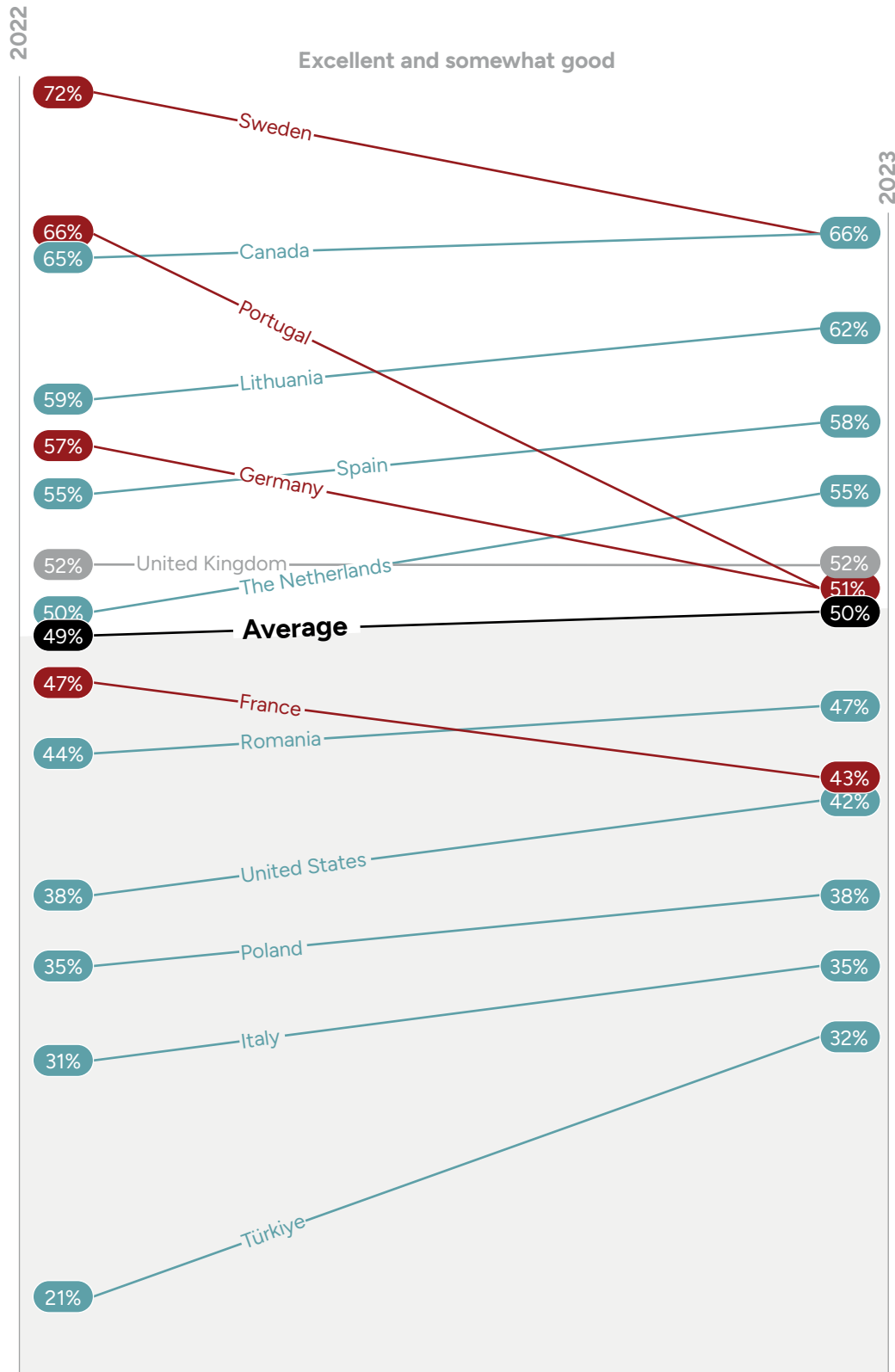


Women in the United States are also more likely to have negative views on the state of their democracy (55%) than men (40%). This, however, pales in comparison with the partisan divide on the issue. Fully 61% of Republican-leaning and 58% of independent respondents say that US democracy is in a bad state. Only 32% of Democrats agree. More than one-third of Republican-leaning respondents (37%) even believe that American democracy is in danger.

Generational differences are often limited in the countries surveyed, although older respondents in France, Spain, and Sweden tend to be more positive about their democracy than their younger cohorts.

SPOTLIGHT Just weeks after Türkiye's national election, respondents there were more positive about the state of Turkish democracy (32%) than in 2022 (21%).

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



Cooperation on Global Challenges

A slight majority of respondents (53%) believe that their country should cooperate on global challenges only with democracies, while nearly one-third (31%) are not concerned about working with non-democracies. Respondents in Türkiye are the most likely to insist on cooperation only with democracies (65%), while respondents in the United States are the least likely (36%) to insist on this.

Political leaders in North America and Europe may often warn about confrontation between democracies and autocracies, but public opinion in the 14 countries surveyed is split on limiting international cooperation on global challenges to democracies. Almost two-thirds of respondents in Portugal (64%) and Sweden (62%) say that the political regime of their country's partners matters, and clear majorities in Italy (60%), Spain (59%), and Poland (57%) agree. Respondents in France (53%) and Canada and the Netherlands (both 45%) are less decisive, notably due to the approximately one-fifth in each country that "don't know" or expressed no opinion.

Germany (44%) and the United Kingdom (43%) are also among the more ambivalent countries. More than one-third of respondents in Germany (37%) and the United Kingdom (35%) want their country to work with democracies and non-democracies on global challenges.

The United States is the only country in which a plurality of respondents (40%) believe that it does not matter if their government cooperates with democracies or non-democracies, an increase of 4 percentage points from 2022. The size of undecided respondents (24%) is also remarkable. US respondents over 55 (31%) are less likely to prioritize cooperation with democracies than 18- to 24-year-olds (40%).

My country should only cooperate with democracies



It does not matter whether my country cooperates with democracies or non-democracies



Don't know

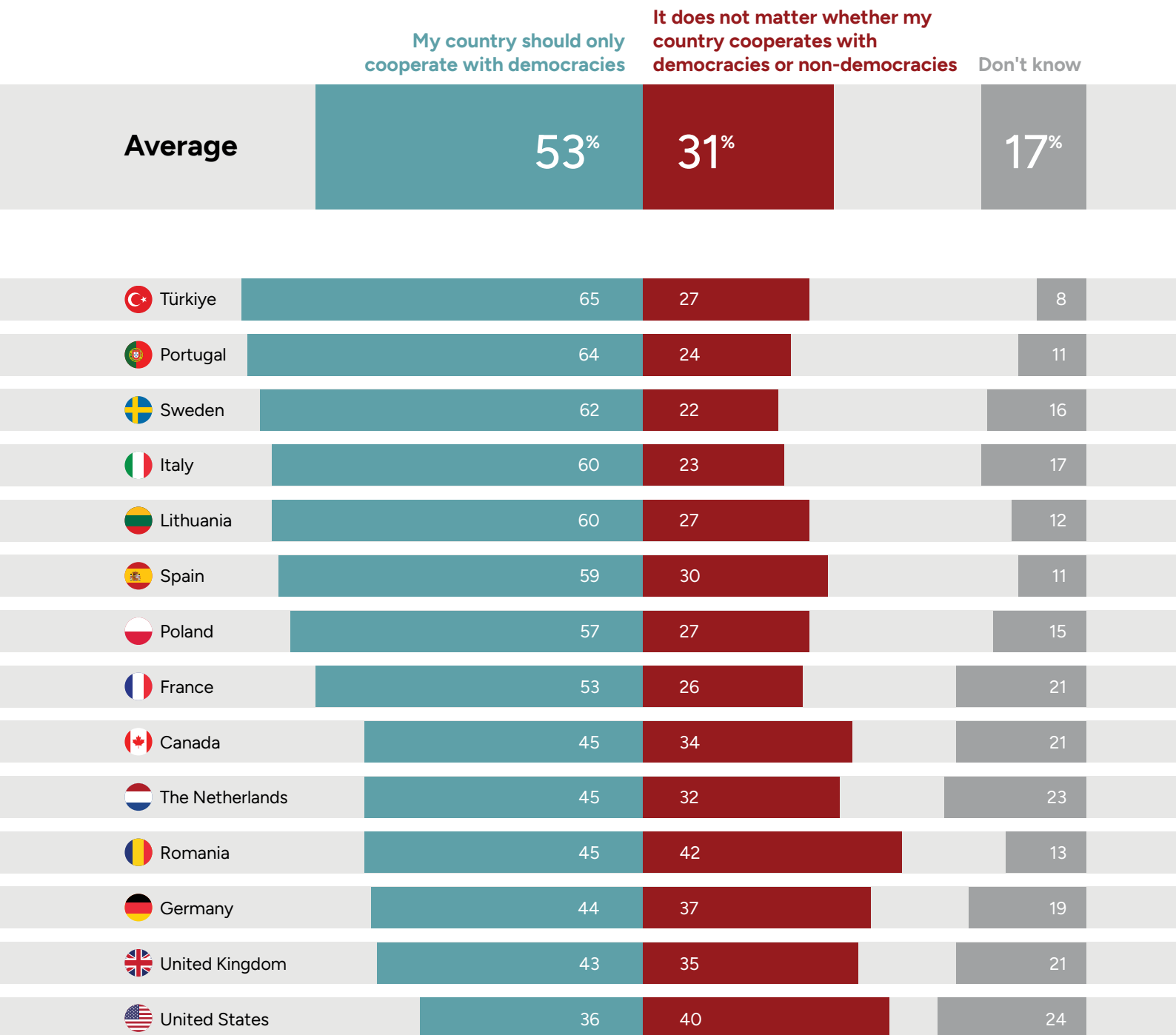


Generational divides on the issue differ widely among the countries surveyed. In Germany, a sizable majority of the youngest respondents (58%) want their country to cooperate only with democracies; 47% of Germans over 65 agree. It is the opposite in Italy and in Poland, where the oldest respondents are more likely than the youngest respondents (by 10 and 9 percentage points, respectively) to want to limit cooperation to democracies.

SPOTLIGHT

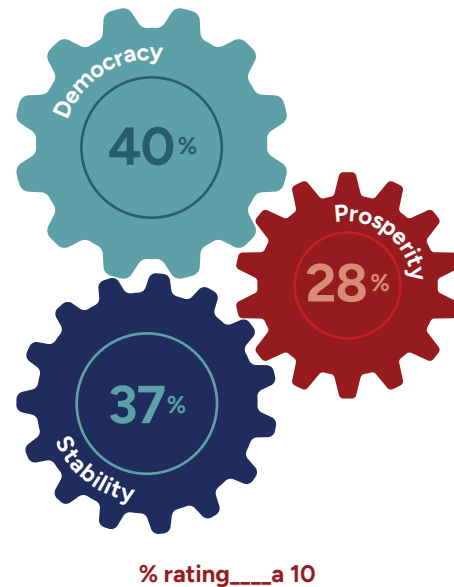
In the United States, 50% of Democrat-leaning respondents want to cooperate only with democracies. That view is far less popular among Republican-leaning respondents, only 35% of whom agree.

When it comes to addressing global challenges, which option comes closer to your view?



Importance of Democracy, Prosperity, and Stability

Respondents were asked to rate the importance of democracy, stability, and prosperity on a scale from 0 to 10. In the text below, “very important” corresponds to a 9 or 10 rating and “not important” corresponds to a rating between 0 and 5. Respondents could rate more than one option similarly.



Democracy and stability are of utmost importance to a majority of survey respondents. Only in Lithuania is prosperity valued more than democracy and stability.

North American and European respondents almost always rate democracy or stability higher than prosperity. Of the three options, democracy is seen as paramount (“very important”) by majorities in Türkiye (74%), Sweden (62%), Italy (58%), and Germany (54%). French respondents also rate democracy (50% very important) higher than stability (36%) or prosperity (25%).

Stability is paramount in Romania (69% very important), Portugal (66%), Poland (61%), the United States (52%), Canada (50%), and the United Kingdom (45%). Romanian and US respondents show the most pronounced preferences for stability over democracy. Stability is rated as very important by more respondents (+8 percentage points) in Romania and the United States (+7 percentage points) than democracy is.

In Lithuania, 64% of respondents consider prosperity very important, followed by stability (62%), and democracy (58%).

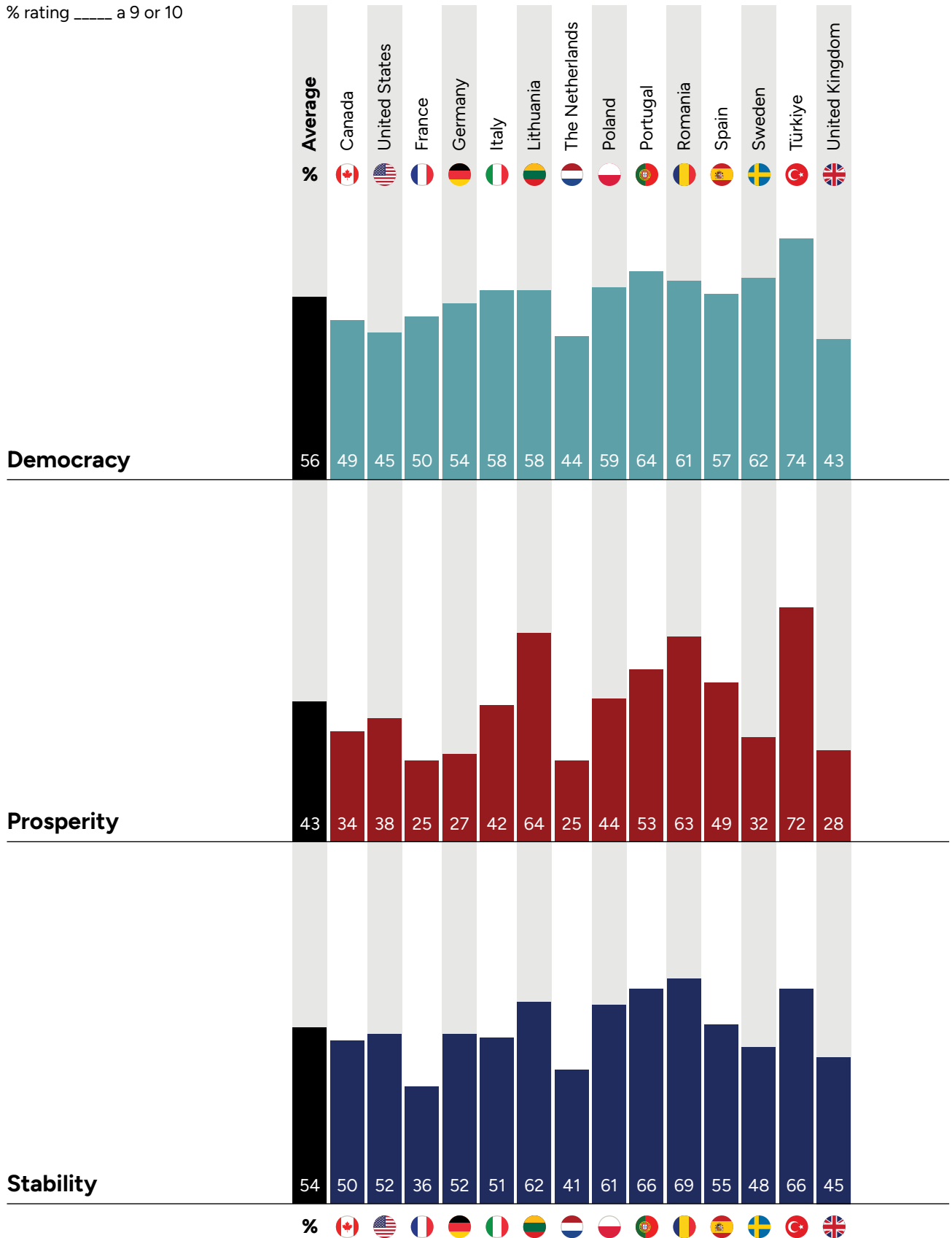
Respondents in North America are more likely to see stability as more important than democracy. In the United States and Canada, stability is given the highest ratings by 52% and 50%, respectively, of respondents. Opinions in Europe are mixed. In France, Germany, Italy, the Netherlands, Spain, and Sweden, democracy is rated very important by more respondents than stability and prosperity are. Respondents in Poland, Portugal, Romania, and the United Kingdom prioritize stability.

In all countries surveyed, a generational divide exists, and the oldest respondents are more likely than the youngest to say democracy is of paramount importance. In Poland, 80% of the oldest respondents but only 40% of the youngest rate democracy as very important. It is 69% versus 31% in the United States, and 70% versus 36% in Germany.

SPOTLIGHT The United States has the highest percentage of respondents (7%) who say that democracy is not important, including 10% of respondents aged 18 to 24.

On a scale from 0 to 10, where 0 means “not at all important” and 10 means “very important”, how important are the following to you?

% rating _____ a 9 or 10



Assessment of Action Against Climate Change

The scientific community is widely seen as taking “a lot” of action on climate change, while China is the actor most often perceived as doing “nothing” about the issue.

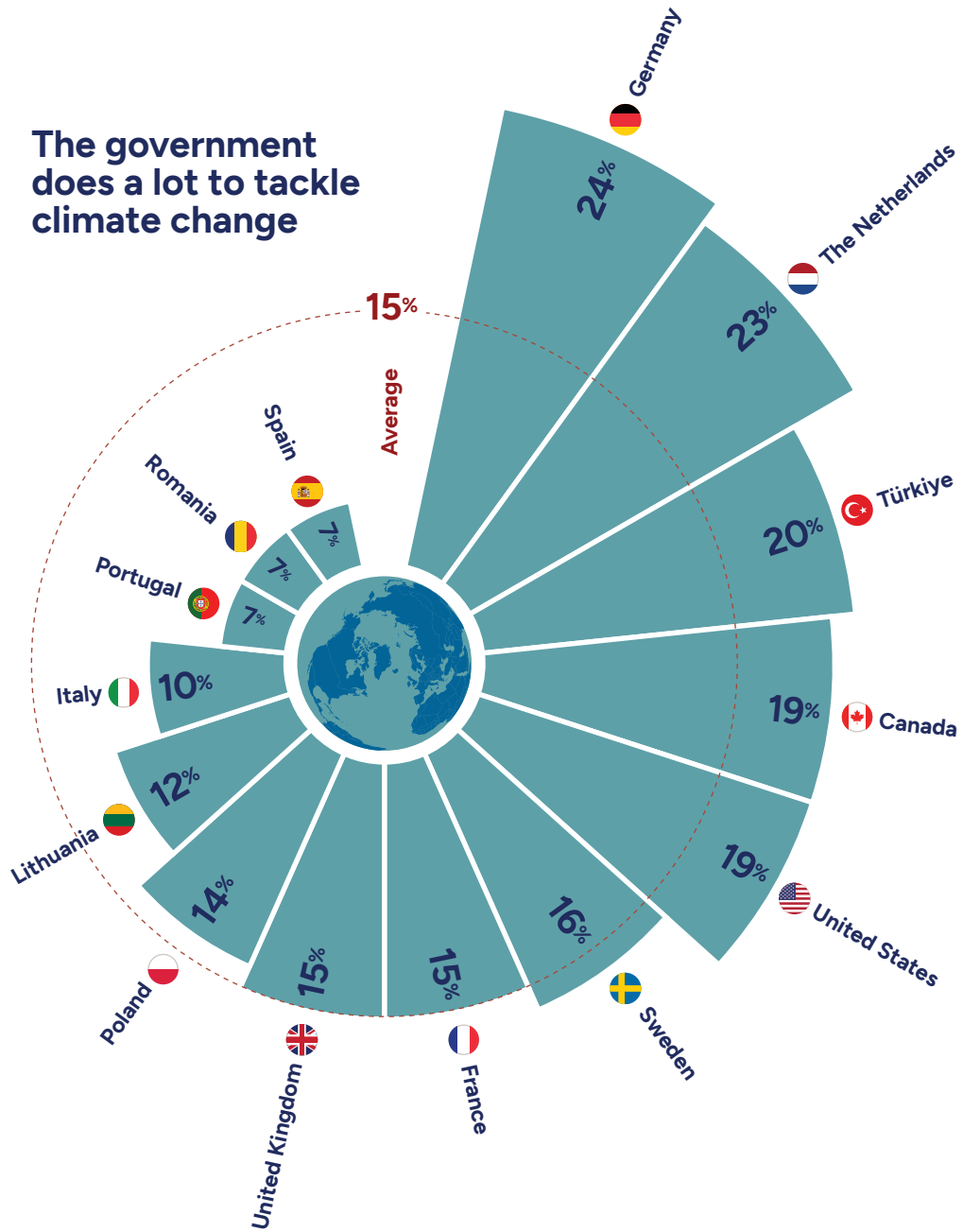
Assessing the efforts of select global actors in tackling climate change, transatlantic publics believe that most do “little” or address the issue “somewhat”. Even those actors perceived as involved earn the acknowledgement of only a minority of respondents. The scientific community is seen as the most involved actor among those included in the survey, but only 26% of respondents say that it does “a lot” to tackle climate change, followed by the EU, which gains recognition from 17% of respondents. The bloc is seen as more proactive than national governments (15% say they do “a lot”), the United States (11%), and China (8%) but equally active as nongovernmental organizations (17%). In contrast, 26% of respondents believe China does “nothing” about climate change, 13% say the same about the United States, and 11% believe that that describes the business sector’s approach.

Assessments of selected actors’ involvement in the fight against climate change varies significantly among national publics. Almost one-third of respondents in Lithuania (33%) and Canada (32%) believe that the scientific community does “a lot” to address climate change. That falls to around one-fifth of respondents in Germany (21%), Romania (19%), and Spain (18%). Respondents see individuals neither as leading actors in addressing climate change nor as completely inactive. On average across countries, most respondents say that citizens are either “little” (30%) or “somewhat” (38%) involved.

The share of respondents who believe that their government is greatly involved in the fight against climate change is highest in Germany (24%), followed by the Netherlands (23%), Türkiye (20%), and Canada and the United States (both 19%). Turkish respondents hold a starkly negative opinion of their own government’s actions in this area: one-fifth of them (20%) say that their political leaders do “nothing” to address climate change. Only respondents in Romania are more likely (26%) to see their government as inactive. Views of US inaction are most common in Spain (21%), Türkiye (20%), and France (17%). The publics most likely to see the United States doing “a lot” to address climate change are in Poland (21%) and Lithuania (17%). Nearly one in five US respondents (19%) agree.

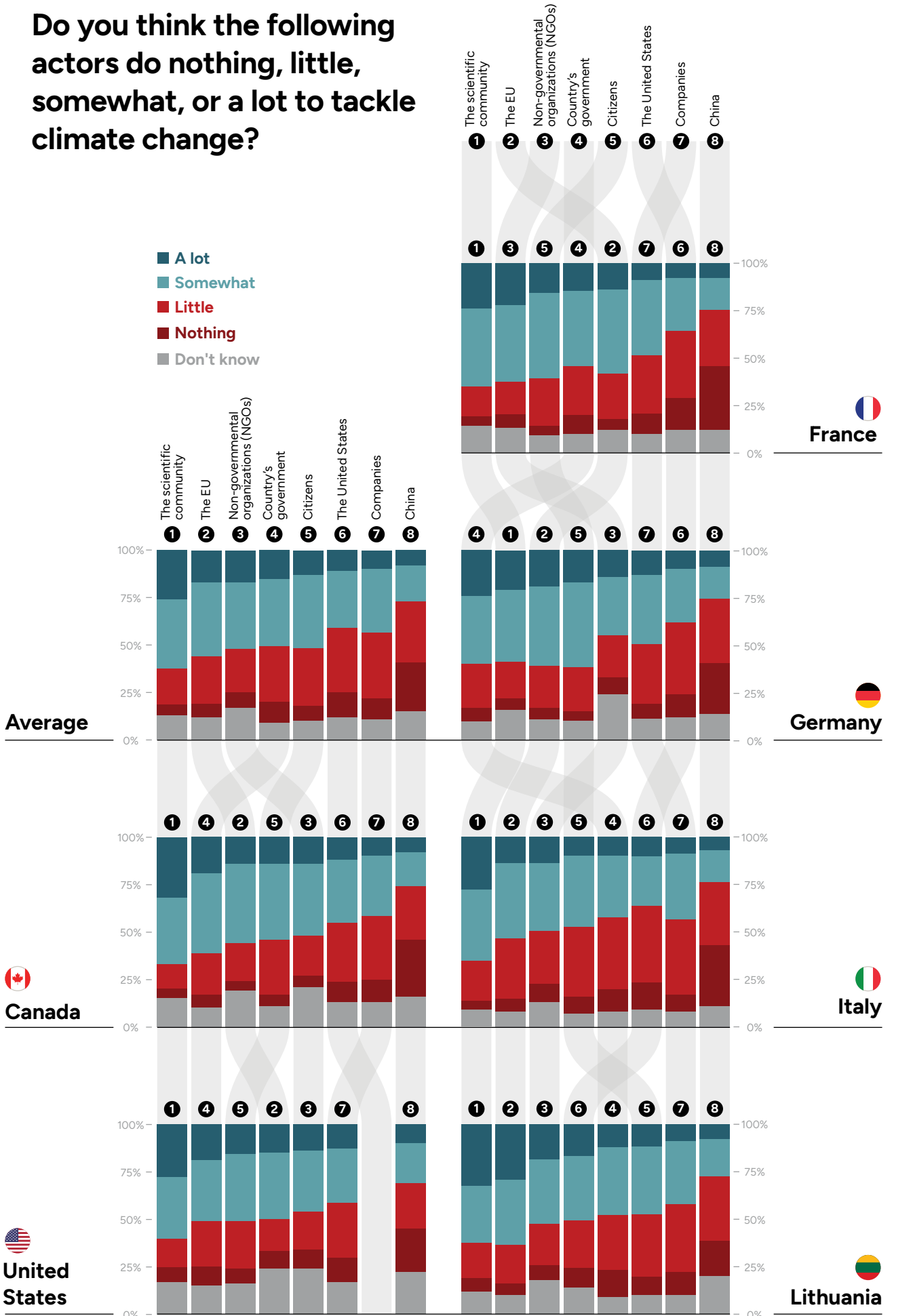
SPOTLIGHT In eight out of 10 EU member states surveyed, more young respondents aged 18 to 24 than those in the oldest age group say that the bloc does “a lot” against climate change. This is the case in Germany (27% versus 18%), Romania (24% versus 15%), Spain (13% versus 6%), Lithuania (34% versus 27%), France (18% versus 12%), Italy (17% versus 11%), the Netherlands (30% versus 24%), and Sweden (24% versus 18%).

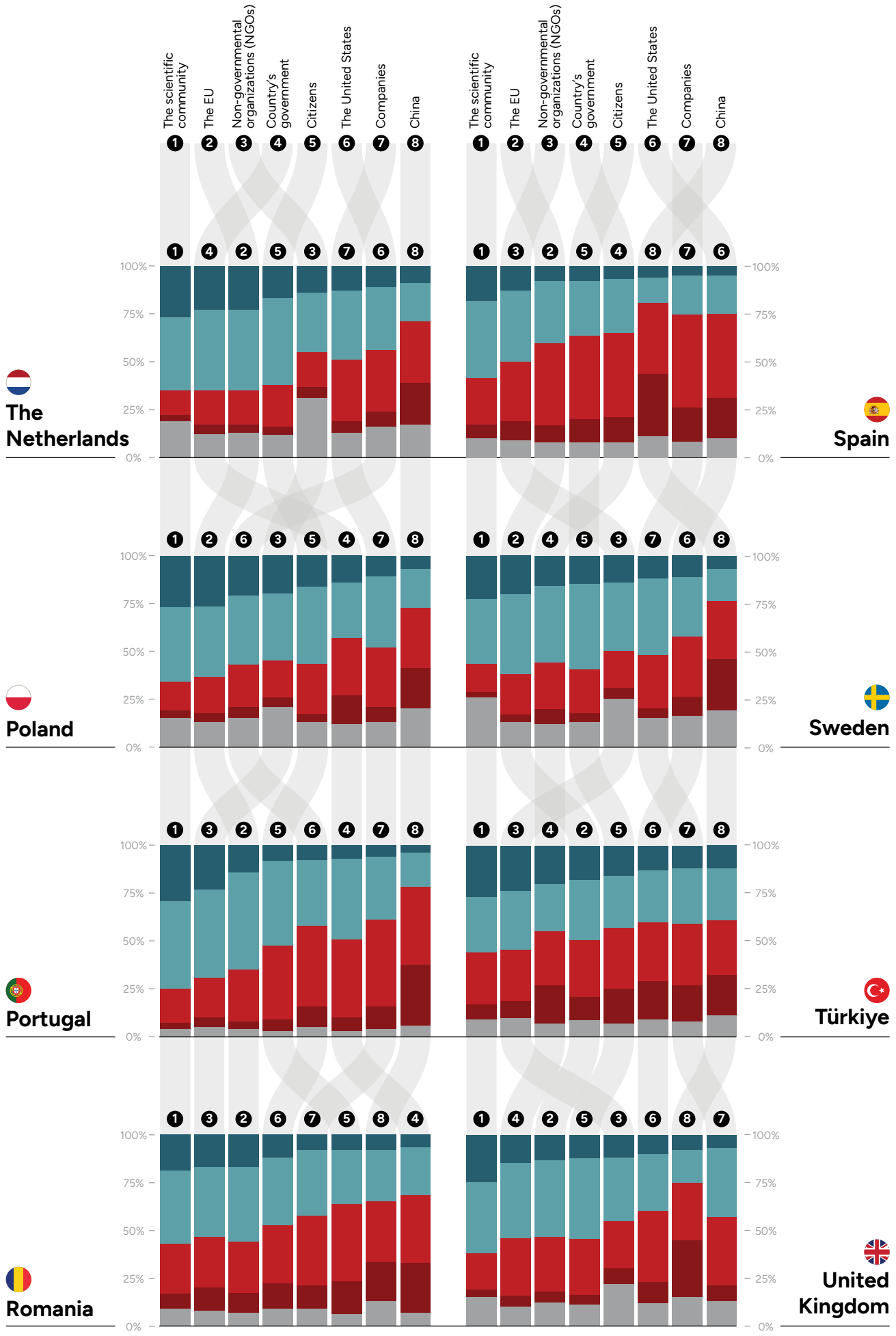
The government does a lot to tackle climate change



Do you think the following actors do nothing, little, somewhat, or a lot to tackle climate change?

- A lot
- Somewhat
- Little
- Nothing
- Don't know





 **The Netherlands**

 **Spain**

 **Poland**

 **Sweden**

 **Portugal**

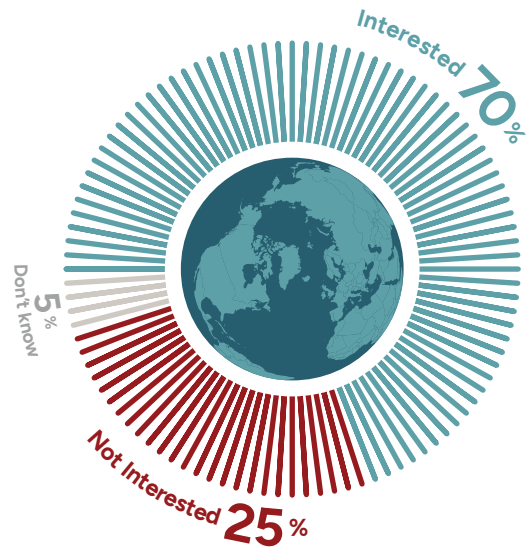
 **Türkiye**

 **Romania**

 **United Kingdom**

Interest in International Affairs

Fully 70% of all respondents say that they are either very or somewhat interested in international affairs. Respondents in Portugal (86%) are the most likely to have an interest, and those in France (57%) are the least likely.



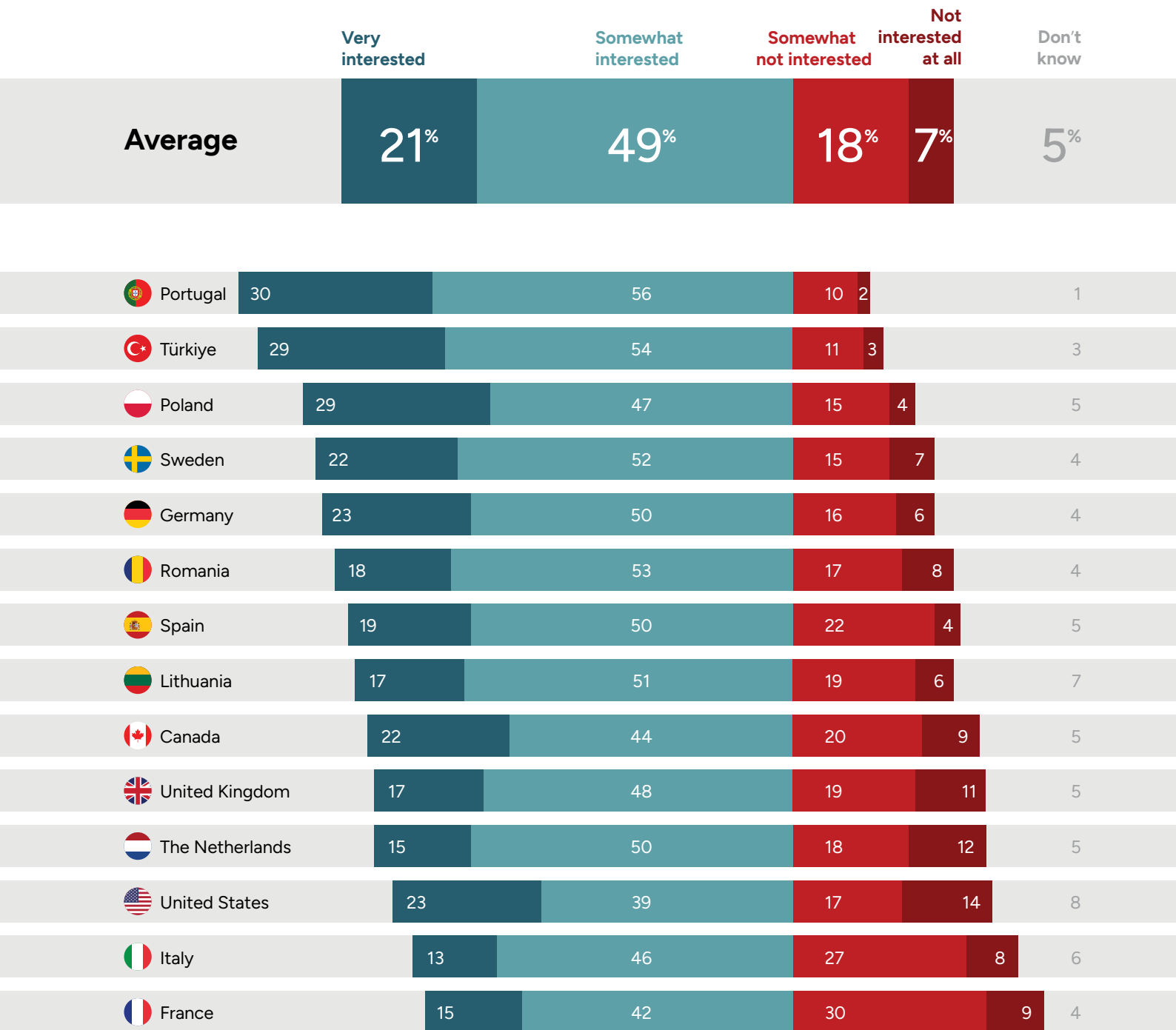
Majorities on both sides of the Atlantic say that they have an interest in global affairs. International issues are viewed as worthy of attention by more than eight out of 10 in Portugal (30% very interested, 56% somewhat interested) and Türkiye (29% very interested, 54% somewhat interested). Interest falls off only slightly in Poland (29% very interested, 47% somewhat interested), Sweden (22% very interested, 52% somewhat interested), and Germany (23% very interested, 50% somewhat interested), and is significantly lower in the United Kingdom (48% somewhat interested, 17% very interested), the United States (39% somewhat interested, 23% very interested), Italy (46% somewhat interested, 13% very interested), and France (42% somewhat interested, 15% very interested). About one in seven US respondents (14%) admit to having no interest in international affairs.

In all 14 countries surveyed, male respondents are more likely than female respondents to say that they have an interest in global issues. The gender gap is particularly significant in France, where 68% of men and 45% of women express interest. In the United States, 73% of men and 51% of women say the same. In the United Kingdom, it is 76% of men and 55% of women.

Generational divides also exist. The oldest respondents in Türkiye show overwhelming interest in global affairs (91%), while nearly three-quarters (72%) of their youngest cohorts do. Interest among the oldest respondents in Poland (89%) and Germany (87%) is also extremely strong—and at least 20 percentage points higher than interest registered by the youngest respondents in Poland (63%) and Germany (67%).

SPOTLIGHT Interest in international affairs is a rare example of partisan agreement in the United States. Fully 72% of Republican-leaning respondents and 70% of Democrat-leaning respondents express interest.

Could you tell me how interested you are in international affairs?



About the Partners



The BBVA Foundation is an expression of the BBVA Group's commitment to improving society through the generation of public goods in the knowledge domain. The promotion and dissemination of knowledge based on scientific research and artistic and cultural creation form the core of the BBVA Foundation's program. Its three lines of action toward these goals are the competitive funding of scientific research and cultural creation, the dissemination of knowledge and culture to society, and the recognition of talent through diverse families of prizes.

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www.flad.pt/en



The Konrad-Adenauer-Stiftung Türkiye (KAS Türkiye) is the Turkish branch of a political foundation with 18 regional offices in Germany and more than 100 offices elsewhere that, combined, oversee projects in more than 120 countries.

KAS Türkiye began its work in 1985 at the invitation of former Turkish Prime Minister Turgut Özal, who, with former German Chancellor Helmut Kohl, established an office in Türkiye. Its goal is strengthening relations and promoting dialogue between Türkiye and Germany and Türkiye and the EU.

KAS Türkiye organizes discussion events and hosts delegations, connecting German ministers, members of parliaments, and young politicians with their Turkish counterparts. KAS Türkiye also provides timely analyses and practical guidance to address the challenges of our time. It conducts research and shares insights with national and international political, business, and civil society decision-makers.

A key KAS Türkiye strength is its ability to provide political education to a wide audience. Current areas of focus are issues related to security, the economy, migration, the EU, the media, and youth.

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About Transatlantic Trends 2023

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About GMF



The German Marshall Fund of the United States (GMF) is a nonpartisan, nonprofit, transatlantic policy organization committed to the idea that the United States and Europe are stronger together.

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2023 Transatlantic Trends

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IDEAS LEADERSHIP HOPE