



July 2024

Transatlantic Trends

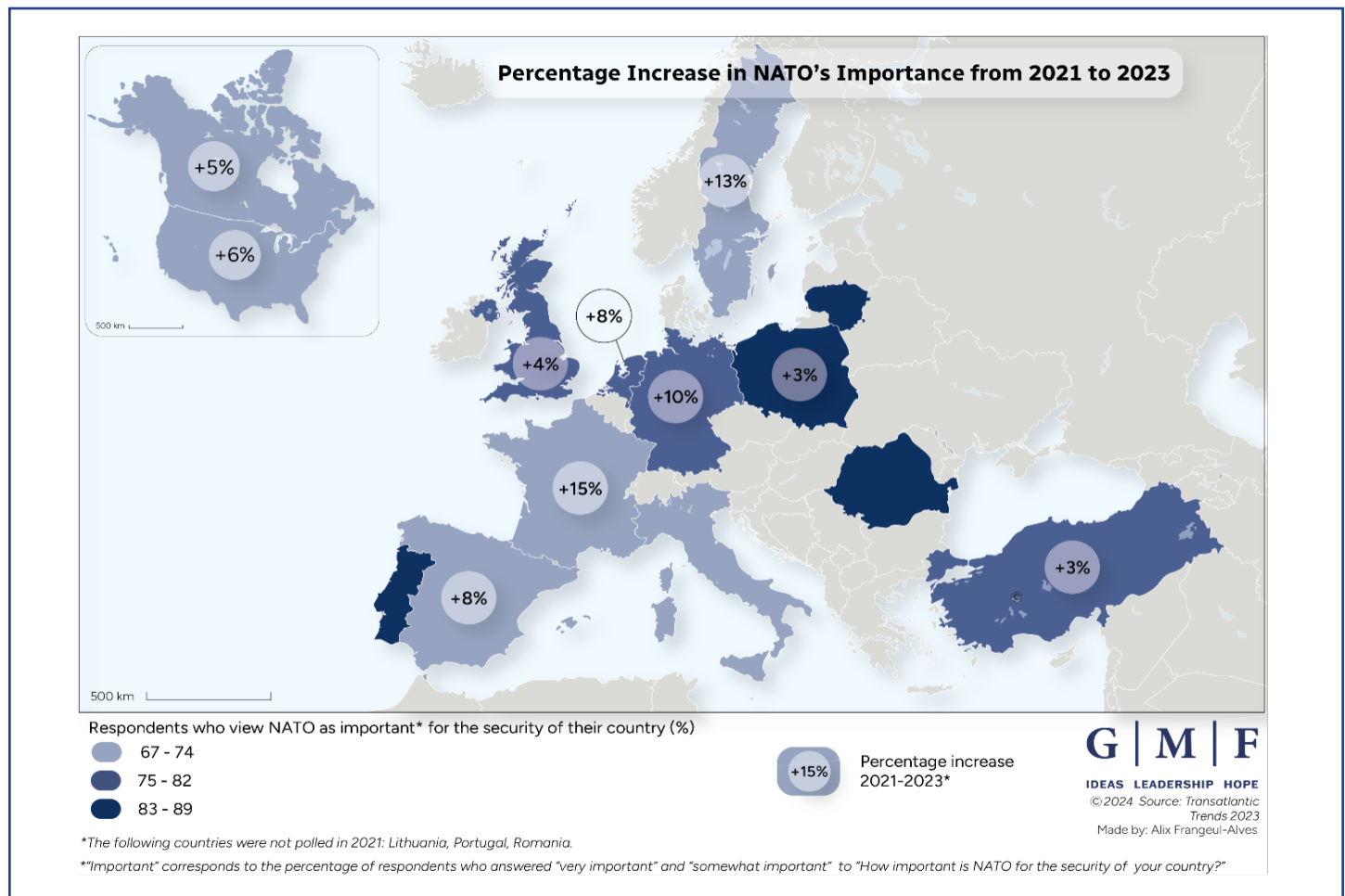
Takeaways From Public Opinion for NATO's Path Forward

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GMF's annual "Transatlantic Trends" study offers insights into the European and American perspectives on NATO and transatlantic defense cooperation. Amid a confluence of global crises, including the COVID-19 pandemic, Russia's full-scale invasion of Ukraine, and the heightened polarization of domestic politics, the survey reveals robust public support for a three-pronged approach to European security, articulating NATO's collective defense capabilities, the United States' sustained engagement, and a stronger EU. While negative views of Russia and China prevail, younger generations hold more positive views of these two countries, and the expectation that US global influence will wane significantly is prevalent. The following analysis delves deeper into these findings and provides policy recommendations ahead of the NATO summit in Washington, DC.

NATO is Viewed as More Important Since the Russian Invasion of Ukraine



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Russia's full-scale invasion of Ukraine in February 2022 has underscored NATO's significance in the transatlantic public's view.

Data show that there was a notable shift in attitudes toward NATO's role in national security in 2022: the proportion of respondents deeming NATO important rose 11%, from 67% in 2021 to 78% in 2022. This sentiment remained unchanged in 2023 (77%).

The Russian aggression toward Ukraine has further enhanced the perception of NATO's role as critical to Eastern European national security. In Poland, the proportion of respondents who considered NATO to be important—which had been at 85% in 2021—reached 91% and 87% in 2022 and 2023 respectively.

However, it is noteworthy that the perception of the importance of NATO is not subject to an East-West divide. Between 2021 and 2023, perceptions of the importance of NATO increased significantly in France (+15%), Sweden (+12%), and Germany (+10%). Furthermore, Portugal (90%) and the Netherlands (79%) rank among the countries with the highest shares of respondents describing NATO as important in 2023, demonstrating the alliance's relevance even in Western Europe. Similarly, a strong majority in the United States (70%) describe NATO as important, revealing a willingness to maintain American commitment to the alliance.

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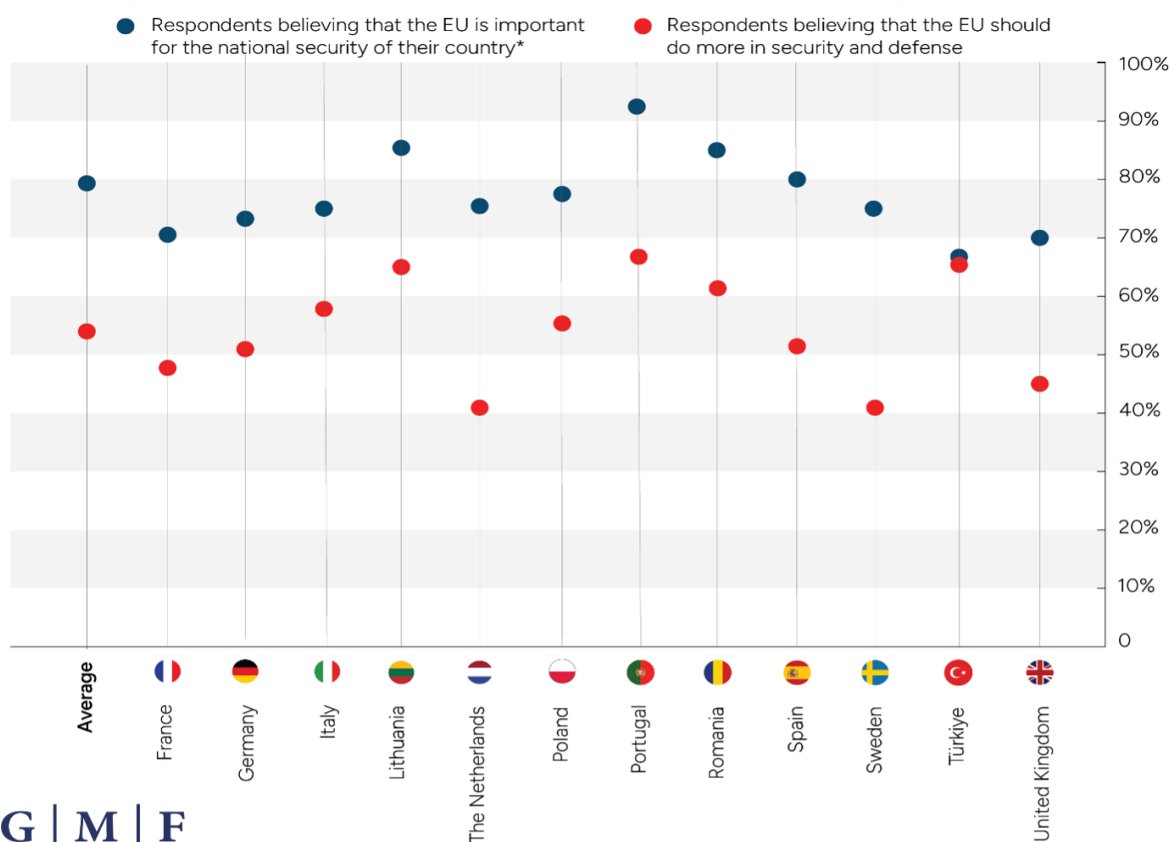
The perception of NATO's importance is likely to endure, notably in Europe: the latest [NATO Annual Tracking Research](#), published in 2024, shows that 75% of the population of NATO countries consider the alliance crucial to the future security of their country. A similar trend is visible in the United States, where 71% of respondents see the alliance as beneficial to their national security. NATO's significance is clear to member-country populations especially in the context of the war on Europe's doorstep. Yet, war fatigue is on the rise, so remaining proactive in communicating about the allies' joint efforts, particularly in deterring Russia, would benefit this perception.

Europeans Urge the EU to Increase Its Security and Defense Capabilities

A significant 79% of Europeans consider the EU important or very important for their country's national security, and 54% support a stronger role for the EU in security and defense in 2023. This perspective is prevalent even among countries deeply invested in NATO. Notably, the populations of the Weimar Triangle—France, Germany, and Poland—overwhelmingly support the EU's taking more decisive measures in the security and defense domains. This collective stance underscores the growing expectation that the EU will assert itself as a pivotal player in regional stability and security

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Europeans View the EU as a Pivotal Actor for their Security and Defense



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"Important" corresponds to the respondents who answered "very important" and "somewhat important" to the polling.

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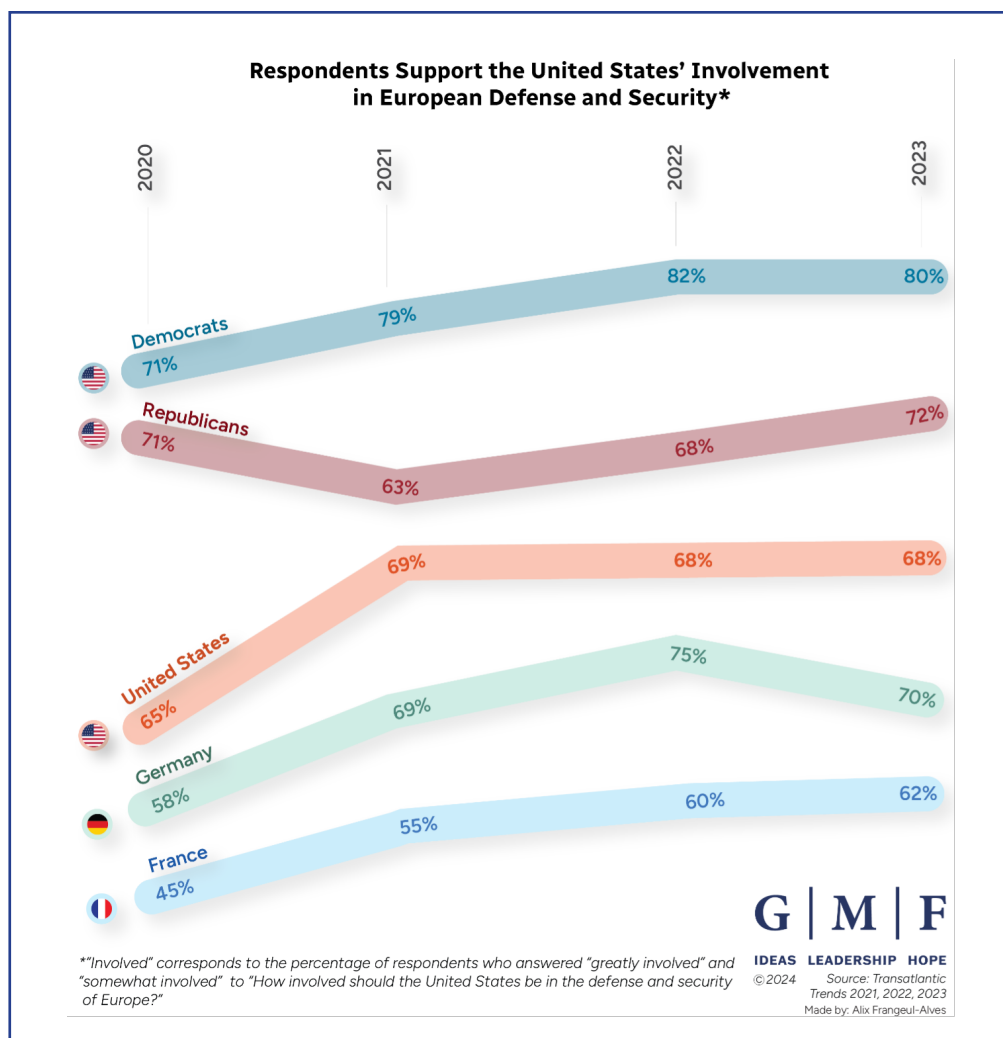
The Eurobarometer survey from Spring 2024 reveals that 77% of EU citizens support a common defense and security policy across EU countries. Similarly, 71% of respondents agree that the EU needs to reinforce its military production capacity. Public opinion thus provides strong backing for the massive investments needed in European defense—€500 billion according to European Commission President von der Leyen's estimate—in the coming years. Cooperation in the Weimar Triangle format could be a driving force to bolster these efforts as France, Germany, and Poland account for more than 30% of Europe's defense spending.

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Sustained US Involvement as a Pillar of European Security

European publics remain strongly supportive of US involvement in European security. Notably, France and Germany have seen significant surges in approval, with support jumping 17% (from 45% to 62%) and 15% (from 55% to 70%) respectively. These upticks correlate with the election of President Joe Biden in November 2020 and the Russian invasion of Ukraine in 2022. Across Europe, a robust majority (73%) endorse the United States' contribution to European security, with Sweden and Türkiye witnessing striking leaps of 25% and 22% respectively from 2021 to 2023.

Equally significant is the American public's bipartisan support for their country's engagement in European defense and security, with 68% in favor—a finding that contrasts with calls to withdraw from NATO. In 2023, a substantial majority of both Democratic (80%) and Republican (72%) supporters advocated for continued US involvement in European affairs, reflecting a broad consensus on the issue.



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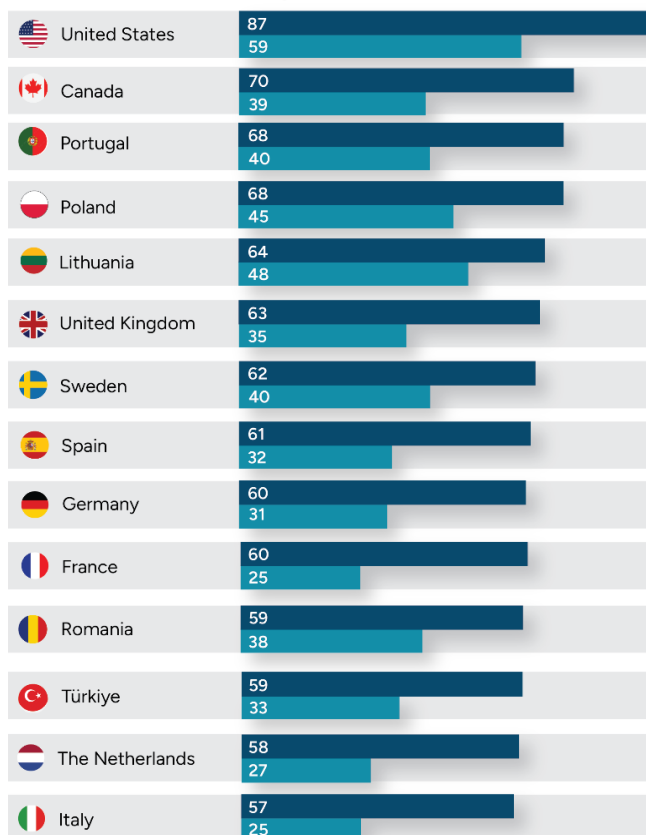
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European publics prefer a threefold approach based on NATO, a stronger role for the EU, and US involvement, and they do not perceive these approaches as competing. The fact that a majority of Americans (51%) believes the United States has a responsibility to protect Europe ([YouGov Eurotrack+US survey, February 2024](#)) provides strong public backing for further transatlantic cooperation in security and defense with a particular focus on burden-sharing and responsibility-sharing.

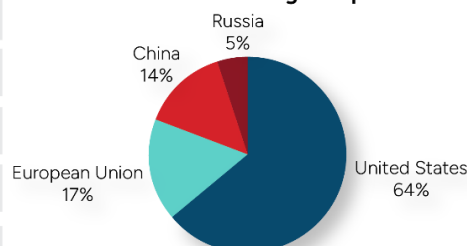
Younger Generations Hold More Positive Views of Russia and China as the World Becomes More Multipolar

Respondents Anticipate a Sharp Decline in US Global Influence in the Next Five Years

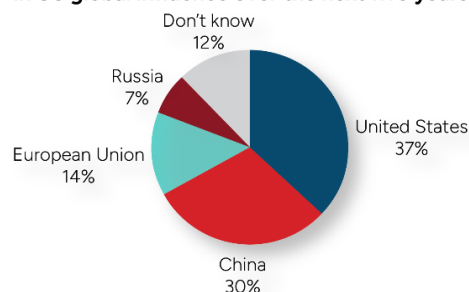
■ % of respondents who say the United States is the most influential actor in global affairs in 2023
■ % who say the United States will be the most influential actor in global affairs in the next five years



In 2023, the United States was viewed as the most influential global power



In 2023, respondents anticipated a sharp decline in US global influence over the next five years



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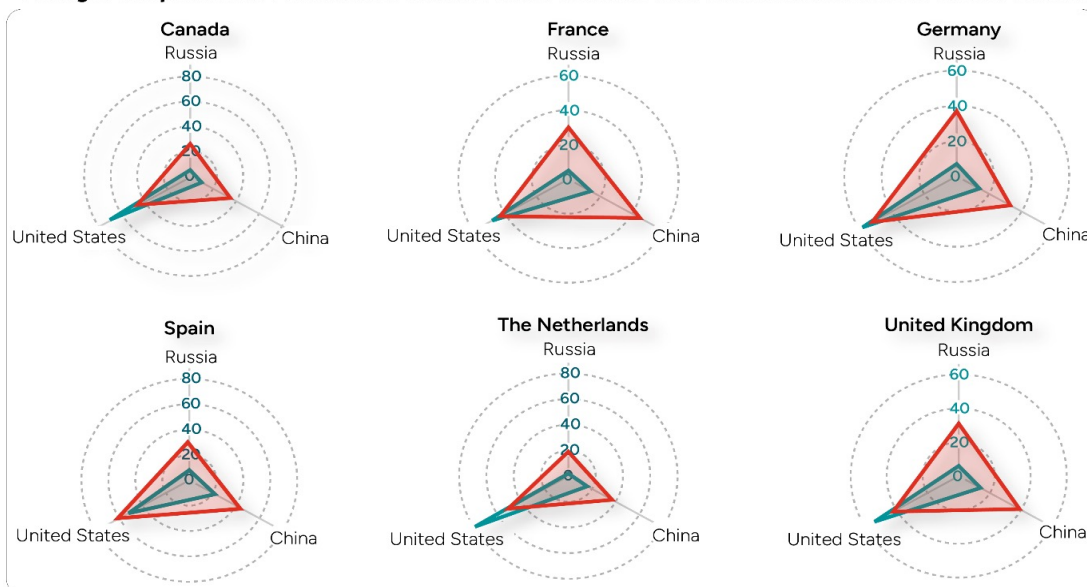
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Transatlantic publics expect the global order to shift significantly in the next five years. While 64% describe the United States as the world's most influential actor today, only 37% believe that this will be the case in five years (a 27% drop). In contrast, most respondents expect China's influence to grow, with 30% seeing the country as the world's most influential actor in five years (an increase of 16%). The EU and Russia, in contrast, are expected to be relatively less influential (14% and 7%, respectively).

Young respondents anticipate a much more multipolar global order: thirty percent expect the United States to be the most influential actor in global affairs in five years, at levels similar to those of China (26%) and the EU (23%). This different thinking on polarity is reflected in Gen Z's evaluation of the influence of major actors. In general, younger respondents see US influence in global affairs as less positive than their elders see it (54% versus 69%), and tend to perceive Russian influence in global affairs more positively. In 2023, 27% of respondents between 18 and 24 years old held a positive view of Russia's influence, against 9% of respondents over 65 years old. This was notably the case in the United Kingdom (31% versus 6% in 2023), Germany (37% versus 7% in 2023), and France (30% versus 5% in 2023).

A similar pattern is visible in the perceptions of China's influence. In 2023, 39% of young respondents, as opposed to 21% of older respondents, described Beijing's influence in global affairs as positive. This trend was particularly visible in the United Kingdom (39% versus 6%), and in France (45% versus 14%).

Younger Respondents Feel More Positive About Russia's and China's Influence in Global Affairs



■ Younger respondents feeling positive about the influence of China, Russia, and the United States in global affairs (%)
 ■ Older respondents feeling positive about the influence of China, Russia, and the United States in global affairs (%)*

*"Positive" corresponds to the percentage of respondents who answered "very positive" and "generally positive" to "How do you feel about ...'s influence in global affairs?"

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Forecast:

Recent polls from the [Pew Research Center](#) have highlighted generational differences in perceptions of Russia's and China's global influence. In 2024, 16% of the youngest American adults had a favorable view of Russia, as opposed to 5% of the oldest Americans. Similarly, 25% of young Americans had a favorable image of China as opposed to 8% among their elders in 2024. In the context of heightened strategic competition in all spheres of international affairs, NATO allies must collectively and individually enhance their efforts to raise public awareness about Moscow's and Beijing's narratives and actions.

Outlook: Toward the Washington Summit and Beyond

As NATO celebrates its 75th anniversary in Washington, DC, it must adapt to a new security environment and a shifting global order. The results from Transatlantic Trends highlight opportunities for the Alliance to proactively shape policy and public opinion in the years to come.

- Improving public diplomacy toward young people is critical to ensure enduring support for the Alliance

The more positive perceptions of Russia's and China's global influence among Gen Z highlights that NATO must enhance its engagement with young people. This could involve reinforcing the #ProtectTheFuture initiative and broadening public diplomacy efforts beyond the academic sphere. Closer collaboration with cities and the creation of a NATO local ambassador program for less privileged youth are key options. Enhancing public awareness of and resistance to disinformation is also crucial: NATO's Strategic Communications Centre of Excellence should expand its membership to bolster cooperation between its steering committee and the alliance. NATO should also tailor its narrative to challenges of the twenty-first century—such as cybersecurity or climate change—to better reflect the strategic environment influencing Gen Z's foreign policy beliefs.

- Stronger EU security and defense benefit the European pillar of NATO and the future of the European security order

NATO must take the EU seriously on security and defense and give a more central place to the EU in the process of strengthening the European pillar in NATO. Because of its financial power, instruments, and mechanisms, and the increasing overlap in EU and NATO membership, the EU constitutes a prime forum allowing its member states to align their efforts and make them interoperable with NATO's. The incoming NATO Secretary General should therefore foster ties with the EU to assess how the future of EU defense—such as the implementation of the Strategic Compass or the Defense Industrial Strategy—can contribute to NATO's efforts. In addition, enhancing cooperation on resilience and strategic communication should be prioritized in the coming years.

- The United States and its European allies should develop a concrete roadmap for transatlantic responsibility-sharing

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As support for US engagement in European security and defense remains strong on both sides of the Atlantic, the two sides should more concretely define their commitments. In addition to reaching at least 2% of GDP in defense spending, they should define their contributions to the alliance's strategy. Europeans could do so in the short term by taking the lead within the Ramstein group, and in the medium term by prioritizing a stronger European defense industry adapted to the Russian threat. Most importantly, Europeans must engage in a strategic dialogue on the European contribution to missile defense and nuclear defense. Concurrently, the United States must provide credible assurance to European allies of collective defense and deterrence.