ZOGBY
RESEARCH SERVICES

ISSUE BRIEF

AN UPDATED LOOK AT EUROPEAN ATTITUDES TOWARD RUSSIA'S WAR IN UKRAINE

October 2023

This most recent poll was conducted in early October, more than four months after our last survey measuring European and American attitudes toward Russia's war in Ukraine. During this period, Ukraine's offensive proved less dramatic than had been anticipated. In addition, the pressures resulting from the large numbers of Ukrainian refugees, the economic impact and the costs of the war appear to be fueling a negative reaction from populist parties in several European countries and the US.

- As was the case in our May poll, while Russia is still seen as at fault for the conflict and the major obstacle for peace, there is a slide in support for continuing the war, for following the US lead in foreign affairs, and for providing more aid to Ukraine and supporting Ukrainian refugees.
- The biggest drop in support for the war has occurred in Poland, which has been the strongest proponent of confronting Russian aggression. There is also evidence of a slide in support in Germany.
- The battle in the US Congress over new aid for Ukraine is reflected in a partisan split on continuing support for the war and on more US aid to Ukraine.

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EXECUTIVE SUMMARY

Since July of 2022, we have been conducting polls in seven European countries (France, Germany, Italy, Spain, Poland, the United Kingdom, and Turkey) and the United States of America. The polling was designed to measure attitudes toward the Russian invasion of Ukraine: who was at fault, what the impact of the invasion would be on affected countries, and what actions should be taken.

We have conducted our surveys in July and October, 2022, and January, May, and most recently in October, 2023. The overall samples include a robust 31,000 respondents. They have allowed us to track changing attitudes, where they can be observed.

This current poll was conducted in early October, more than four months after our last survey. During this period, Ukraine's offensive proved less dramatic than had been anticipated. In addition, the pressures resulting from the large numbers of Ukrainian refugees, the economic impact and costs of the war appear to be fueling a negative reaction from populist parties in several European countries and the US.

In this summary, we report on three noteworthy areas of the findings: the overall trend lines in the impact the war is having on European public opinion; a special focus on Poland, which continues to be a strong supporter of the war, but where there is a notable precipitous decline in that support; and the partisan split in the US and its potential impact on continued American support for Ukraine.

N.B.: As has been the case in our earlier analyses, we report on the findings in each of the eight countries surveyed. We also report on the aggregated findings for six of the European countries (France, Germany, Italy, Spain, Poland, and the United Kingdom), and then separately report on attitudes in Turkey and the US.

I. General Observations:

- As was the case in our earlier polls, in the aggregated six countries, Russia is still seen as the party most responsible for the war (76%) and the major obstacle for peace (57%).
- There is a slide in support for continuing the war, with almost eight in 10 now saying they believe the costs of conflict are too high and a compromise should be found to save lives and resources. More than six in 10 in the aggregated six European countries say that their biggest concern with the war is the impact it continues to have on increases in the cost of living.

- There is also an overall decline in support for continuing to follow the US lead in global affairs (37%) coupled with a desire to be more independent in their country's foreign policy (63%).
- There is also a slight but growing number of Europeans who feel that since the war began, both the European Union and NATO have become somewhat weaker—which runs counter to the goal of making both the EU and NATO feel stronger.
- And finally, while there is continued support for applying sanctions on Russia, there is little or no appetite for sending troops to Ukraine, declaring a no-fly zone, sending NATO forces into the battle, or continuing to send arms to Ukraine.

II. Poland:

- Poland, which has been the strongest supporter of the war since it began, has experienced some of the most dramatic shifts in attitudes. Poles still hold the strongest negative views toward Russia's responsibility for starting the war (88%) and being the biggest obstacle to ending it (67%)—the latter number, however, reflects a marked decline since May when it was 76%.
- There is also a significant increase in the percentage of Poles (from 63% in May to 74% in October) who now believe that the costs of the war are too high and compromise is needed to end the war. There are also notable increases in the percentages of Poles who feel that NATO and the EU have been weakened and that it's time to demonstrate more independence from the US in global affairs.
- The negative impact of the war's costs on Poland are also reflected in the sharp decline in Polish attitudes toward the presence of Ukrainian refugees in their country (down 14 points since May), providing more economic assistance to Ukraine (down 21 points since May), and support for continued sanctions against Russia (down 12 points since May).

III. The Partisan Split in the US:

- The split in the Republican ranks in Congress over approval of President Biden's request for increased aid for Ukraine brought into public view the fact that there are divergent views on this issue that may impact policy in the future.
- As our polling demonstrates, one in five Republicans and Democrats alike view the US as mainly responsible for the war and also see the US as the major obstacle to peace between Russia and Ukraine. They may be a minority in each party, but, as was in evidence in early October, it was in part the opposition of some Republicans to increased aid to Ukraine that contributed to the removal of the Speaker of the House.
- While seven in 10 Americans agree that the costs of the war are concerning and that a compromise should be found, many more Republicans hold this view—three quarters of Republicans versus six in 10 Democrats. It's also worth noting that a plurality of Republicans believe that the war has weakened the US on the world stage.

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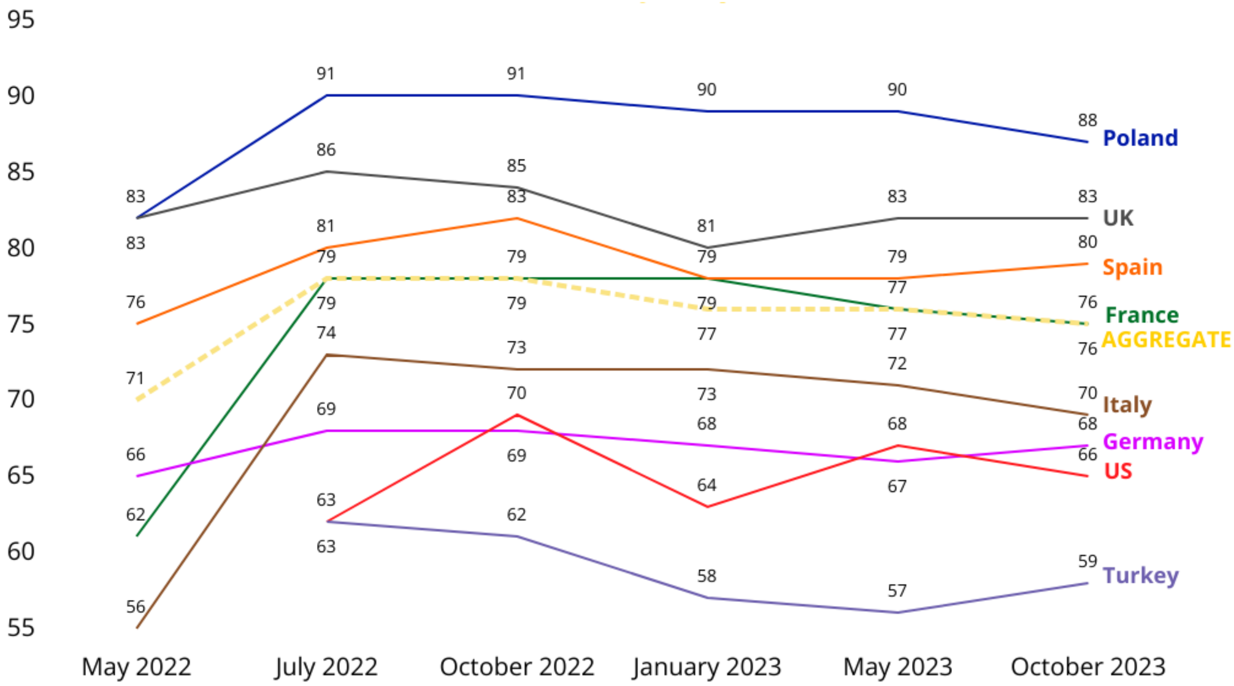
Moving forward, if the war continues to drag on without some dramatic shifts on the battlefield in Ukraine's favor, these three factors may be determinative in shaping the conflict's future:

- Public weariness with the fear that the US has led them into "a war without end";
- The ability of populist parties in Europe and the US to mobilize sentiment in opposition to the costs of the war; and
- In particular, the opposition of elements in both the US's Republican and Democratic parties to provide continued funding for the war.

RESULTS

Who is mainly responsible for the outbreak of the war in Ukraine?

Those who replied "Russia"



Aggregate totals are derived from only the respondents in France, Germany, Italy, Spain, Poland, and the UK. The possible responses were: Russia, Ukraine, the EU, the US, None of these, and I don't know.

As noted in May, respondents' views of responsibility for the outbreak of the war in Ukraine have clearly solidified. Three-quarters of the aggregate of European respondents (76%) hold this view. There are fixed attitudes about Russia's culpability since last July 2022 in all six countries: Poland (88%), the UK (83%), Spain (80%), France (76%), Italy (70%), and Germany (68%).

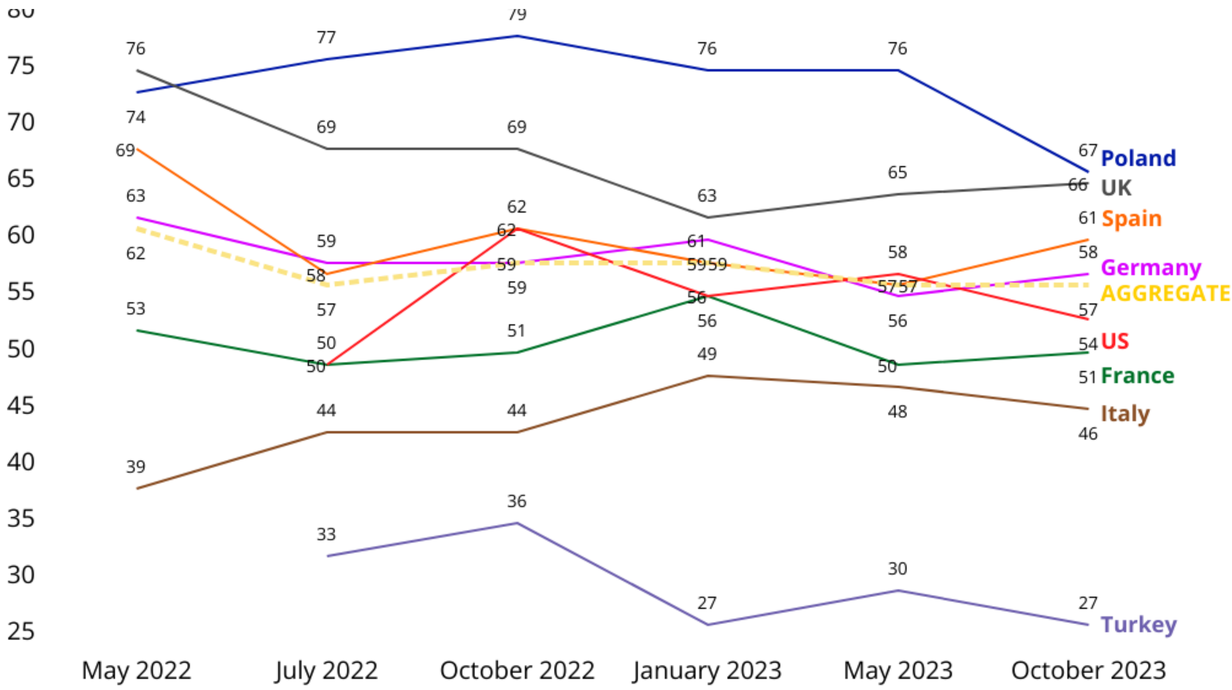
Only 13% of the aggregate group indicate that Ukraine, the EU, or the US are mainly responsible, also a solidified percentage.

In Turkey, a majority (59%) hold Russia responsible, but at a somewhat lower level than in other surveyed countries. US opinion continues to waver up and down slightly, now down 2 points since May to 66% saying Russia is mainly responsible (from 64% in January and 68% in May).

About one in five American (21%) and Turkish (19%) respondents continue to blame the US for the outbreak of war in Ukraine. In the US, equal percentages of Democrats (20%) and Republicans (21%) hold their own government responsible.

Which country constitutes the biggest obstacle to peace between Russia and Ukraine?

Those who replied "Russia"



Aggregate totals are derived from only the respondents in France, Germany, Italy, Spain, Poland, and the UK. The possible responses were: Russia, Ukraine, the EU, the US, None of these, and I don't know.

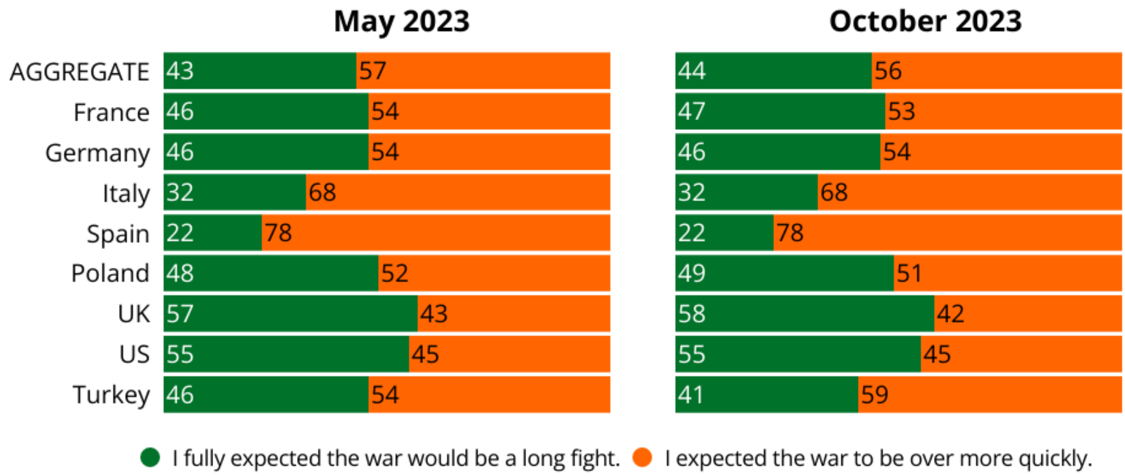
In the aggregate, 57% of European respondents say Russia is the biggest obstacle to peace between Russia and Ukraine.

Russia is considered the biggest obstacle to peace by majorities in Poland (67%), the UK (66%), Spain (61%), Germany (58%) and France (51%). These levels are stable in the UK, Germany, and France, with an uptick in Spain (+4) and a more significant drop in Poland (-9). In Italy a plurality of 46% say Russia is the biggest obstacle to peace.

The US is viewed as the biggest obstacle to peace by 13% of respondents in Germany, 15% in France, 19% in Spain, and 26% in Italy; these numbers have been stable since January.

In the US and Turkey there are slight downticks in those who view Russia as the biggest obstacle to peace: down 4 points to 54% of American respondents and down 3 points to 27% of Turkish respondents. One in five Americans (21%) say the US is the biggest obstacle; a view somewhat equally shared by Democrats (18%) and Republicans (22%). A majority in Turkey (56%) continue to say other parties are more significant obstacles to peace than Russia, with 45% of Turks pointing to the US as the major impediment to peace.

I expected a long fight vs. I expected the war to be over quickly

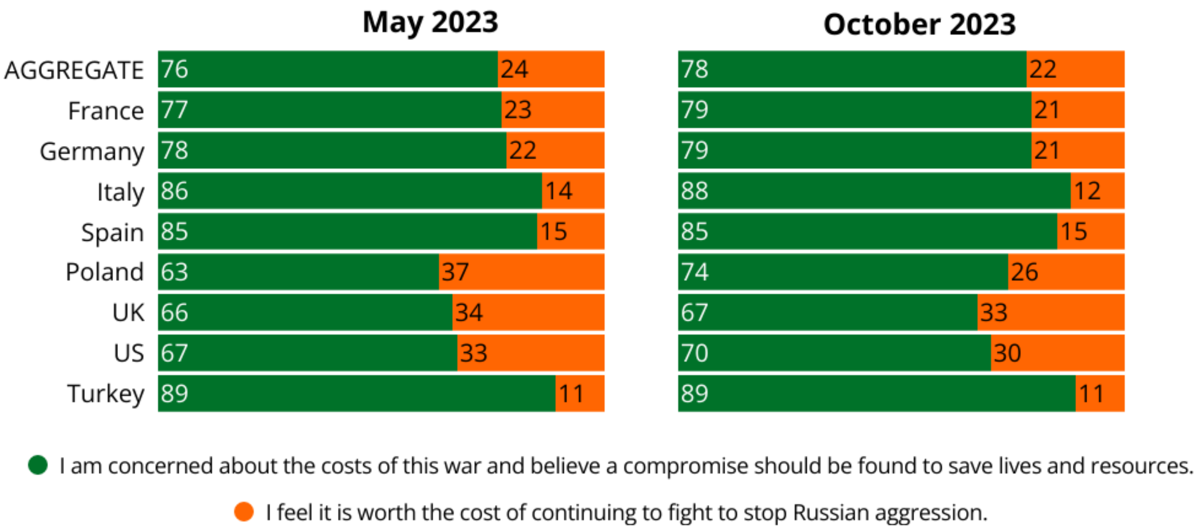


Respondents' reports of their initial expectations about the war remain stable since we first asked in May 2023 if they "fully expected the war would be a long fight" or "expected it to be over more quickly." Fifty-six percent (56%) of European respondents in the aggregate say they expected the war to be over more quickly. More than three-quarters of respondents in Spain (78%), two-thirds in Italy (68%), and one-half in Germany (54%), France (53%), and Poland (51%) had this expectation.

A majority of Turkish respondents—up 5 points since May to 59%—also expected the war to be over more quickly.

On the other hand, majorities in the UK (58%) and the US (55%) say they fully expected a long fight.

Compromise to save lives and resources vs. Worth the cost to stop Russian aggression

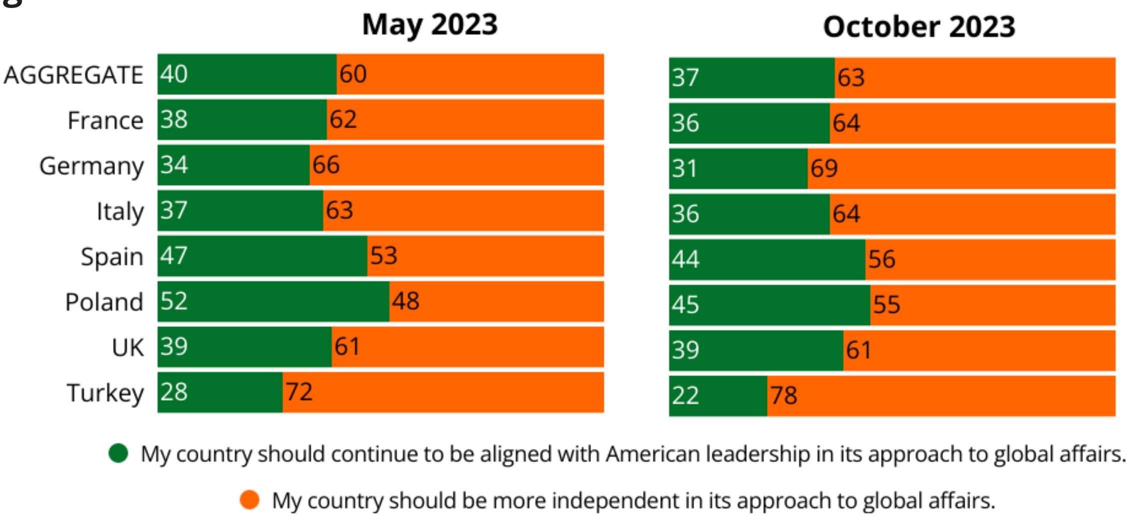


Weariness with the war continues to be evident, with a very slight uptick in those who are concerned "about the costs of this war and believe a compromise should be found to save lives and resources" in the European aggregate (+2 to 78%). Concerns about the war's costs and the need for a compromise are strongest in Italy (88%) and Spain (85%), followed by Germany (79%) and France (79%). In Poland, we find a significant increase in concern: up 11 points to 74%. About two-thirds of respondents in the UK (67%) also hold this opinion.

Seven in 10 American respondents (70%) agree that the costs of the war are concerning and that a compromise should be found. Though majorities in both major US political parties desire a compromise, this view is stronger among Republicans (76%) than among Democrats (59%).

Almost nine in 10 Turkish respondents (89%) share this view.

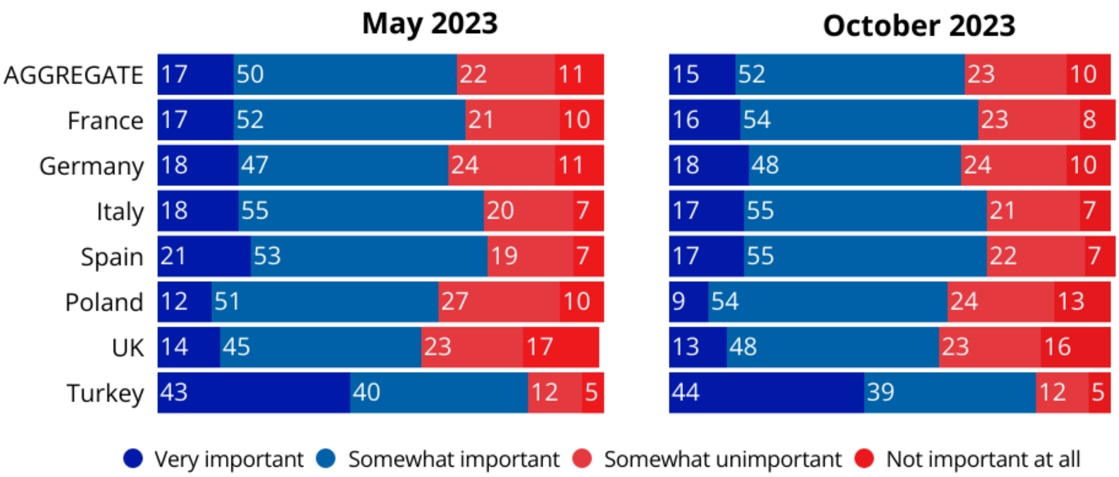
My country should be aligned with the US vs. More independent in global affairs



In the aggregate, 63% of European respondents want their country to be more independent in its approach to global affairs, up 3 points since May, rather than continue to be aligned with American leadership in its approach to global affairs (37%). This view is growing in Poland (up 7 points to 55%), Germany (up 3 points to 69%), and Spain (up 3 points to 56%). Majorities who hold this view are relatively stable in France (64%), Italy (64%), and the UK (61%).

This independent stance is also growing even stronger in Turkey, with 78%, up 6 points since May, who think their country should be more independent.

How important is it that your country develop closer ties with China?



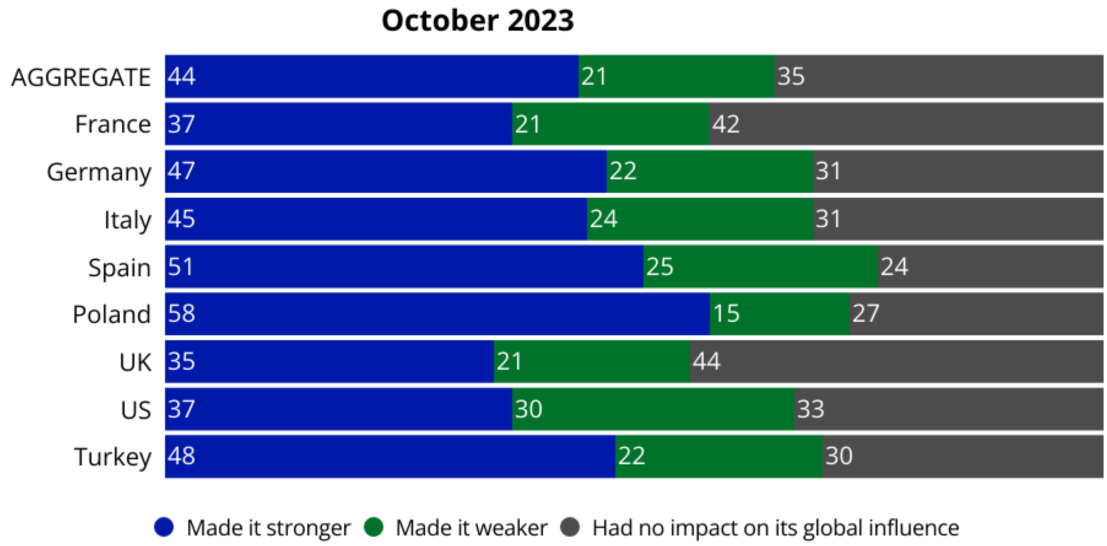
Attitudes about the importance of developing closer ties with China remain quite stable since May. Two-thirds of European respondents in the aggregate (67%) continue to feel it is important for their country to develop closer ties with China. This view is strongest in Spain (72%) and Italy (72%), followed by France (70%), Germany (66%), Poland (63%), and the UK (61%). Across the board, it is worth noting that about half of all respondents say that developing closer ties with China is "somewhat" rather than "very" important.

In Turkey, 83% of respondents continue to feel that closer ties with China are important, and a plurality (44%) view this as "very important."

Has the Russia/Ukraine war made the global influence of each of the following countries stronger, weaker, or has it had no impact on their global influence?

Respondents were asked about the impact of the Russia/Ukraine war on the global influence of the US, China, the EU, NATO, and the United Nations. Overall, among European respondents, the US is the most likely to be viewed as being made stronger by the war, followed closely by China, while the EU is viewed as most likely to be weaker because of the war. The war's impact on the global influence of NATO and the UN are given mixed reviews.

US



Almost across the board, there are declines in the percentages of respondents who think the global influence of the United States has been made stronger by the Russia/Ukraine war, though at least pluralities in most countries surveyed still hold this view.

In the aggregate, 44% of European respondents say the global influence of the US has been made stronger by the war, a downtick of 2 points since May. The most significant drop is in Poland, down 8 points to 58%, with declines of 3 points in Germany (to 47%), Spain (to 51%), and France (to 37%). In France, a plurality (42%) now holds that the war has had no impact on the US global influence. Attitudes are steady in Italy where a plurality of 45% say US influence is stronger and in the UK where 35% say it is stronger, but a plurality of 44% say the war has had no impact.

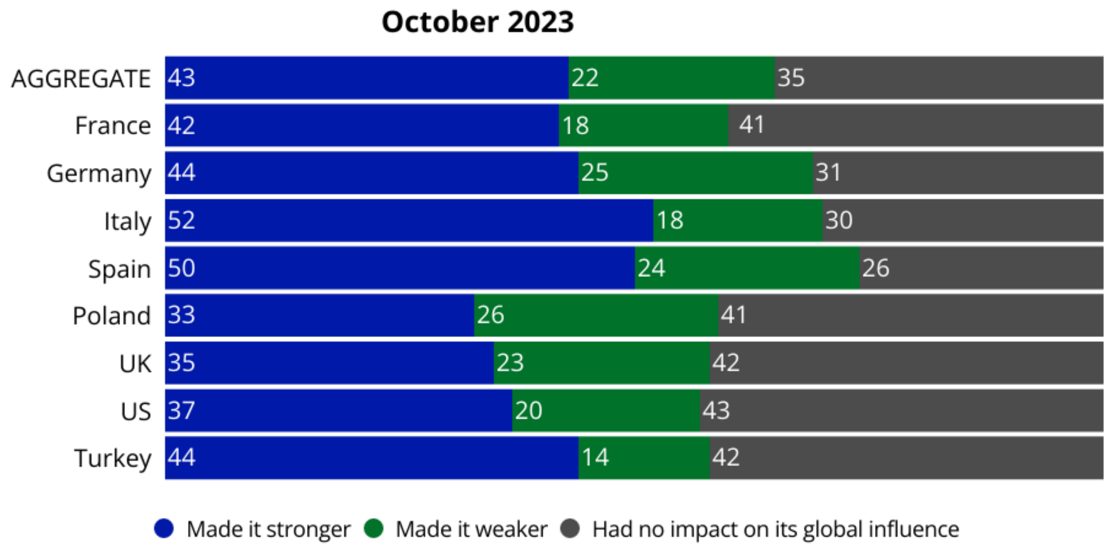
Still, across the board, in European countries no more than one-quarter of respondents say the US has been weakened by the war.

In Turkey, a plurality of 48% also say the global influence of the US has been made stronger by the war, a decline of 4 points since May.

Attitudes in the US continue to be mixed on this question, with a very slight 37% plurality saying the war has strengthened US global influence, while 33% say it has had no impact. Thirty percent (30%) of US respondents, the highest of any surveyed country, say the Russia/Ukraine war has weakened its global influence.

Among US Democrats, 50% view the war as strengthening US influence, while among Republicans only 28% hold that view and a plurality (43%) say the war has weakened the US.

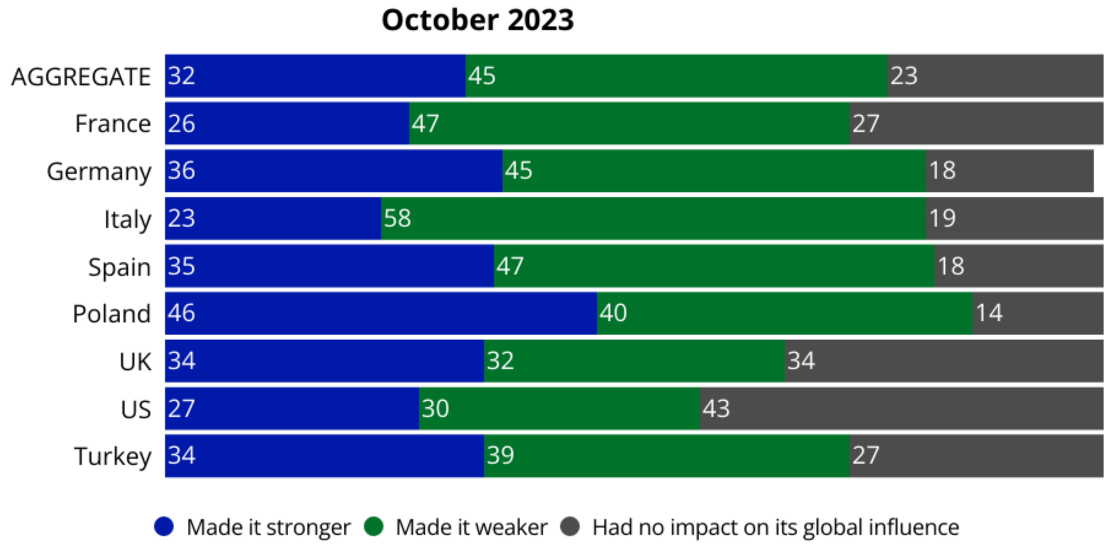
China



Similarly, with respect to China's global influence, we find that the view that it has been strengthened by the Russia/Ukraine has declined slightly since May. In the aggregate 43% of European respondents hold this view, a 2-point downtick but still at a similar level to those who say that the US is stronger. There are declines of 3–6 points in Poland (33%), the UK (35%), Italy (52%) and Spain (50%), while attitudes are steady in Germany (44%) and France (42%).

Respondents in both the US and Turkey are split on this question (US: 37% stronger vs. 43% no impact; Turkey: 44% stronger vs. 42% no impact), though both had declines of 3 points with respect to China's global influence getting stronger. Among American respondents, Republicans are far more likely than Democrats to say the war has strengthened China's global influence (47% vs. 31%). A plurality of Democrats view the war as having had no impact on China's standing in the world (46% vs. 35% of Republicans).

European Union



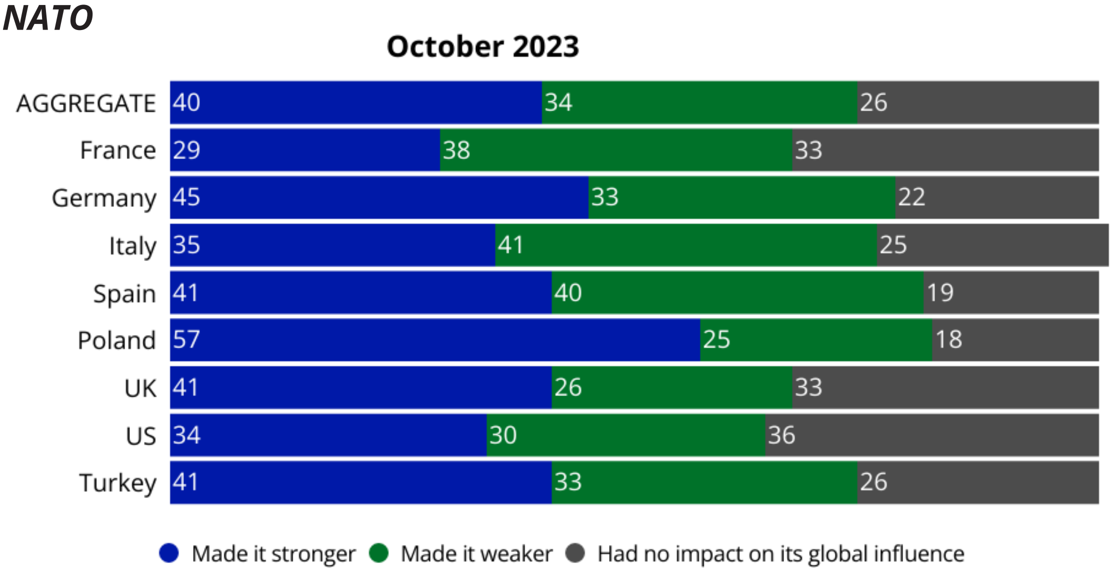
The predominant view in most countries surveyed continues to be that the EU's global influence has been weakened by the Russia/Ukraine war, and that view has grown. A plurality of the aggregate of European respondents (45%) hold that view, up 2 points since May. Upticks of 2–4 points are evident Italy (58%), Spain (47%), France (47%), and Germany (45%), and in Poland (40%)—though a plurality of Polish respondents still say the EU is stronger because of the war despite a decline of 6 points since May (to 46%).

In the UK, opinion remains divided, with one-third (34%) saying the EU's global influence has been strengthened, one-third (32%) saying it has been weakened, and one-third (34%) saying the war has had no impact on its global influence.

Turkish opinion is also split, with 34% saying the war has made the EU's influence stronger and 39% saying it has made it weaker.

Finally, a plurality of US respondents (43%) say the war has had no impact on the EU's global influence, with the remaining respondents split between "stronger" and "weaker."

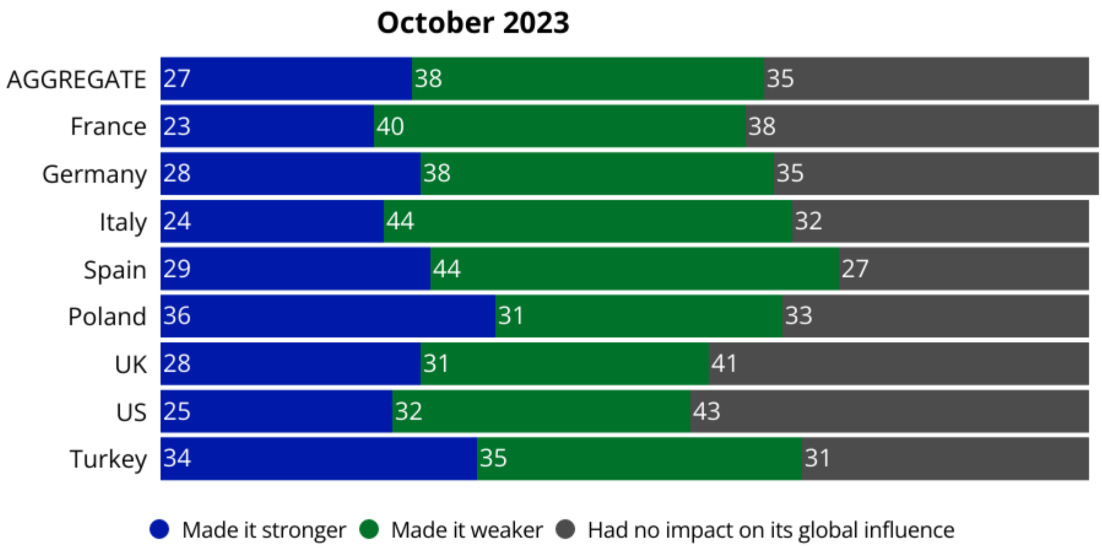
NATO



In the aggregate, 40% of European respondents view NATO as having stronger global influence because of the war, down 3 points since May. We find declines across the board, with the greatest drops in the countries where pluralities hold this view: Poland (down 9 points to 57%), the UK (down 5 points to 41%), Spain (down 4 points to 41%), and France (down 4 points to 29%). In France and Italy, slim pluralities hold the opposing view, that the war has weakened NATO's global influence, and these attitudes have ticked up slightly (France: up 2 points to 38% and Italy: up 4 points to 41%).

Attitudes are stable in Turkey, where a plurality (41%) says NATO is stronger. In the US, attitudes are also steady—and split, with 34% saying "stronger," 30% saying "weaker," and 36% saying "no impact." Democrats lean more solidly toward strong (45% vs. 23% who say weaker), while Republicans lean more solidly toward weaker (40% vs. 25% who say stronger).

United Nations



Overall, respondents in the European countries surveyed continue to lean toward viewing the UN's influence as having been negatively impacted by the war, with additional creep in that direction. In the aggregate, 38% hold this view (+2 since May), including pluralities in Italy (44%), Spain (44%), France (40%), and Germany (38%). In Poland, 36% say the UN's global influence has been strengthened by the war, with almost equal numbers saying it is weaker (31%) or that the war has had no impact (33%). And in the UK 41% say the war has had no impact on the UN's influence, with 28% saying it is stronger and 31% saying it is weaker.

Among US respondents, 43% believe the Russia/Ukraine war has had no impact on the UN's global influence.

Turkish opinion is split: 34% say the UN's influence is stronger, 35% say it is weaker, and 31% say the war has had no impact on the UN's global influence.

Of the following actions that the EU could take, which would you support? Which would you oppose? [Select all that apply.]

- Accepting more Ukrainian refugees in your country
- Providing more economic assistance to Ukraine
- Increasing economic and diplomatic sanctions on Russia
- Completely stopping imports of fossil fuels from Russia
- Sending additional arms and military supplies to the Ukrainian government
- Enforcing a no-fly zone over Ukraine, even if this might trigger a direct conflict between the West and Russia
- Sending troops to Ukraine to help the Ukrainian government defend itself against Russia
- Backing Ukraine to join NATO
- Sending additional troops to NATO countries in Eastern Europe
- Backing Ukraine's accession into the EU

AGGREGATE

July 2022	October 2022	January 2023	May 2023	October 2023
Sanctions	Sanctions	Sanctions	Sanctions	Sanctions
Economic aid	Ukrainian refugees	Economic aid	Ban Russian fuel	Ban Russian fuel
Ukrainian refugees	Economic aid	Ukrainian refugees	Economic aid	NATO accession
EU accession	NATO accession	Ban Russian fuel	NATO accession	Economic aid
NATO accession	EU accession	EU accession	Ukrainian refugees	EU accession
Ban Russian fuel	Ban Russian fuel	NATO accession	EU accession	Ukrainian refugees
Arms supply	Arms supply	Arms supply	Arms supply	Arms supply
NATO troops	NATO troops	NATO troops	NATO troops	NATO troops
Troops	Troops	Troops	Troops	No-fly zone
No-fly zone	No-fly zone	No-fly zone	No-fly zone	Troops

Green shading indicates that support outweighs opposition by at least 10 points. Orange shading indicates that opposition outweighs support.

In the aggregate of the six European countries, increasing economic and diplomatic sanctions on Russia continues to the most supported action that the EU could take. Overall, opinions regarding support and opposition for a number of actions the EU could take have remained quite stable. Relative support for "completely stopping imports of fossil fuels from Russia" continues to be high, while support for "accepting more Ukrainian refuges in your country" has slipped somewhat. Other EU actions with more support than opposition include supporting Ukraine's entry into NATO and into the EU and providing economic aid to Ukraine.

There is less support for "sending additional arms and military supplies to the Ukrainian government" and "sending additional troops to NATO countries in Eastern Europe."

The least supported actions, which are on balance opposed by the aggregate of European respondents, continue to be sending troops to Ukraine and enforcing a no-fly zone.

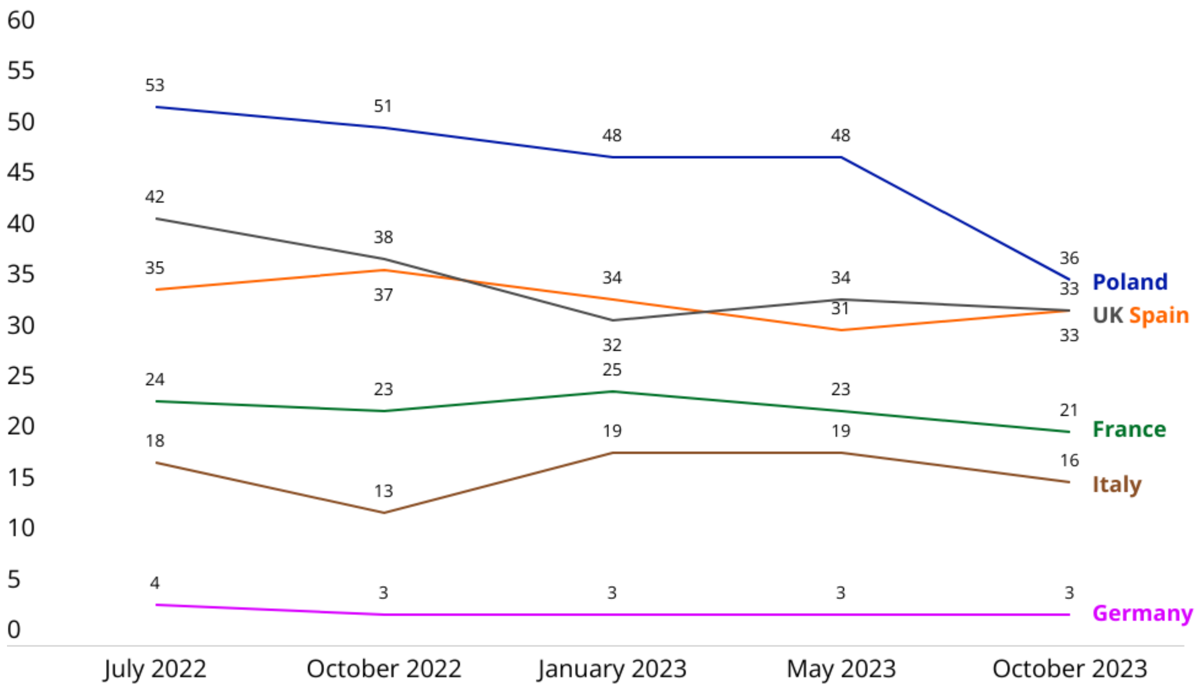
BY COUNTRY

October 2023					
France	Germany	Italy	Spain	Poland	UK
Sanctions	Sanctions	Ukrainian refugees	Sanctions	Sanctions	Sanctions
Ban Russian fuel	Ban Russian fuel	Sanctions	Ukrainian refugees	Ban Russian fuel	Economic aid
NATO accession	Arms supply	EU accession	Economic aid	NATO accession	NATO accession
EU accession	NATO accession	Economic aid	EU accession	EU accession	Arms supply
Economic aid	NATO troops	Ban Russian fuel	NATO accession	Arms supply	Ban Russian fuel
Ukrainian refugees	Ukrainian refugees	NATO accession	Ban Russian fuel	NATO troops	EU accession
Arms supply	Economic aid	NATO troops	Arms supply	No-fly zone	Ukrainian refugees
NATO troops	EU accession	Arms supply	NATO troops	Economic aid	NATO troops
Troops	No-fly zone	No-fly zone	Troops	Troops	Troops
No-fly zone	Troops	Troops	No-fly zone	Ukrainian refugees	No-fly zone

Green shading indicates that support outweighs opposition by at least 10 points. Orange shading indicates that opposition outweighs support.

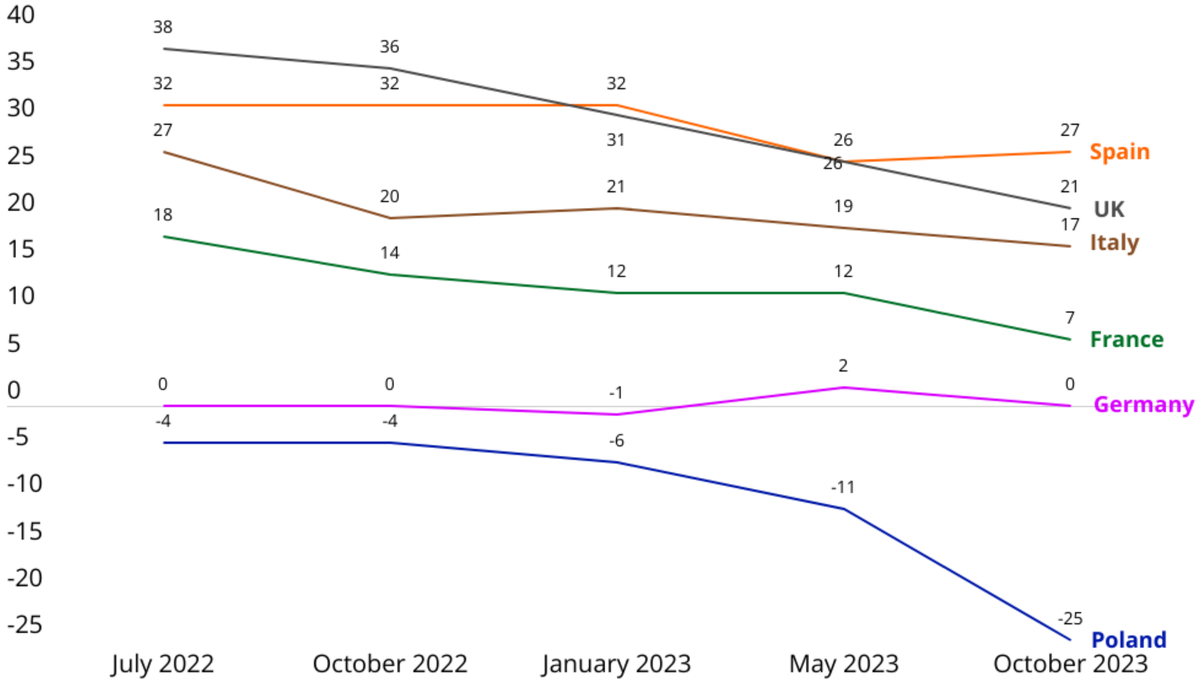
EU Action: Net Support for "Increasing economic and diplomatic sanctions on Russia"

BY COUNTRY



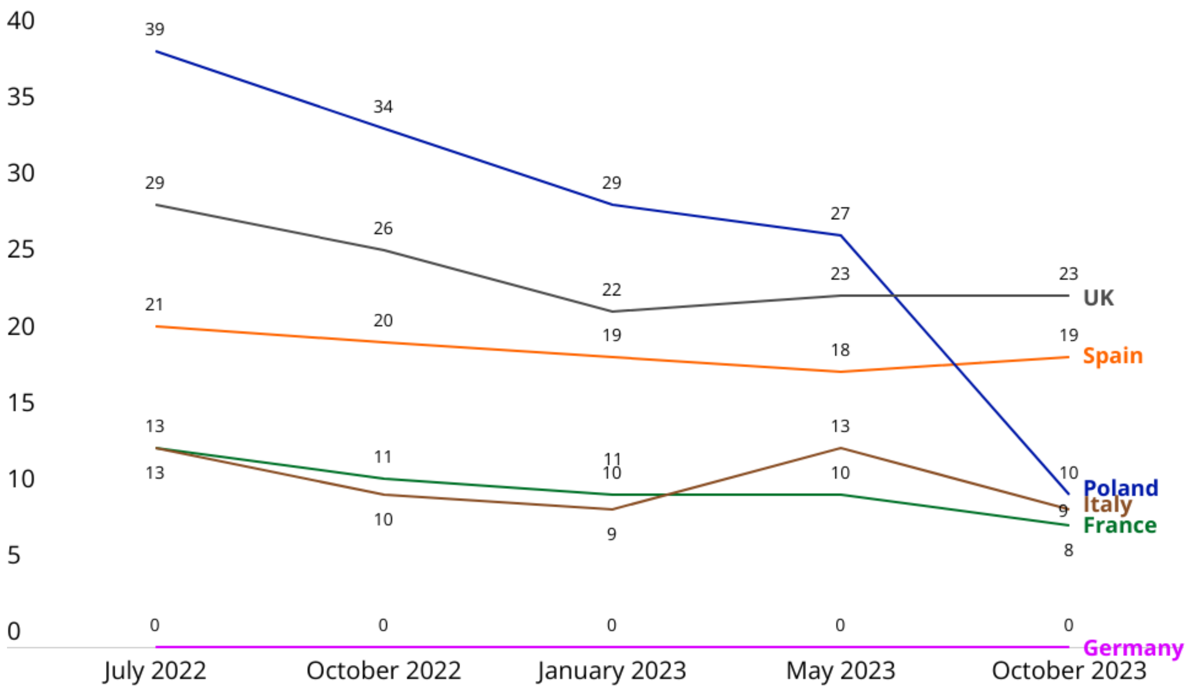
EU Action: Net Support for "Accepting more Ukrainian refugees in your country"

BY COUNTRY



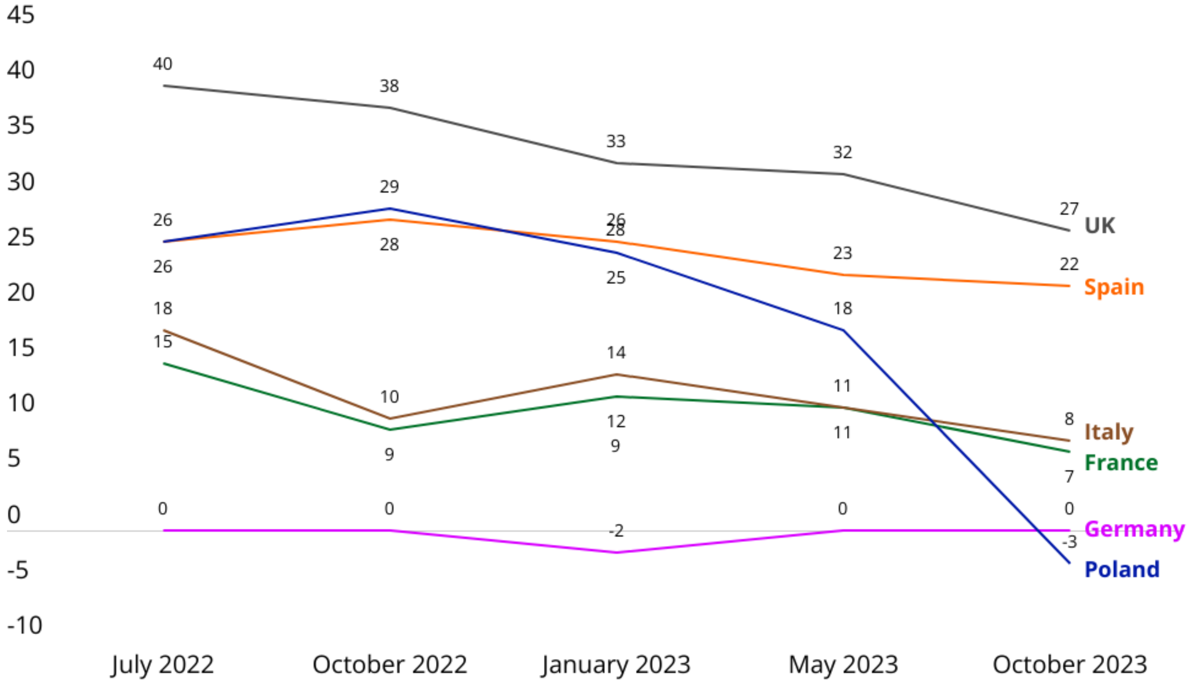
EU Action: Net Support for "Backing Ukraine's accession into the EU"

BY COUNTRY



EU Action: Net Support for "Providing more economic assistance to Ukraine"

BY COUNTRY



Net support for various EU actions in response to the war in Ukraine has slipped in some surveyed countries—in some cases significantly, particularly in Poland—while it has remained stable in other countries.

Increasing economic and diplomatic sanctions on Russia continues to be the action with the broadest and most durable support, with the highest net support in France, Spain, the UK, and Poland (though net support dropped 12 points in Poland to 36%). In Italy, increasing sanctions has the second highest net support. In Germany, all of the possible EU actions have almost equal levels of support and opposition, including sanctions.

With respect to accepting more refugees we find continuing declines in net support in the UK (down 5 to 21%) and France (down 5 to 12%). In Poland, net support is now -25%, plummeting another 14 points since May. Views in Spain, Italy, and Germany are stable, though widely disparate at 27%, 17%, and 0 levels of net support.

Support for Ukraine's accession into the EU has held steady in most countries, except for a slight decline in Italy (down 4 to 9%) and a nosedive in Poland (down 17 points to 10%).

There are more consistent declines in net support with respect to providing more economic assistance to Ukraine, down 5 in the UK (to 27%), down 4 in France (to 7%), down 3 in Italy (to 8%), and another precipitous decline in Poland (down 21 points to -3%).

We find overall strong, but somewhat diminished, US support, and a pronounced partisan divide, for most of non-lethal the EU actions. Among Democrats, a net 34–38% favor increased diplomatic and economic sanctions on Russia, support for Ukraine's entry into NATO, economic assistance to Ukraine, and accepting more Ukrainian refugees. Among Republicans, however, net support is considerably lower: 24% for sanctions, 11% for NATO accession, 5% for economic aid, and just 7% for accepting more Ukrainian refugees. There is also a wide disparity in net support for supplying arms to Ukraine (Democrats: 34% vs. Republicans: 7%) and possible entry into the EU (Democrats: 28% vs. Republicans: 7%).

Europeans who are seeking a compromise have lower levels of net support for most of these possible EU actions in comparison to those who feel the cost of the war is worth it to stop Russian aggression. The only exception is in Germany, where there is very little net support for any of the proposed actions. In the remaining five EU countries, the biggest differential in net support is with respect to "sending additional arms and military supplies to the Ukrainian government"—with the biggest disparities in net support for supplying arms in Italy (49 points) and the UK (46 points). Net support is 29–35 points higher among those who think the war is worth the cost than among those seeking compromise in France, Spain, and Poland. Both sides of this divide, however, are largely opposed to sending troops to NATO countries, sending troops to Ukraine, and enforcing a no-fly zone.

In addition, respondents in France, Spain, and Italy who want their country to be more independent in global affairs, rather than aligned to US leadership, have lower levels of net support for all of these proposed EU actions. In Spain, both sides of this divide are supportive of accepting more Ukrainian refugees and increasing sanctions on Russia. In Germany, negligible levels of net support are the norm for both groups of respondents, the independent-minded and those aligned with US leadership. In the UK, net support is consistent and fairly high regardless of respondents' position on independence in global affairs, with the exceptions of sending troops to Ukraine or to NATO countries and enforcing a no-fly zone.

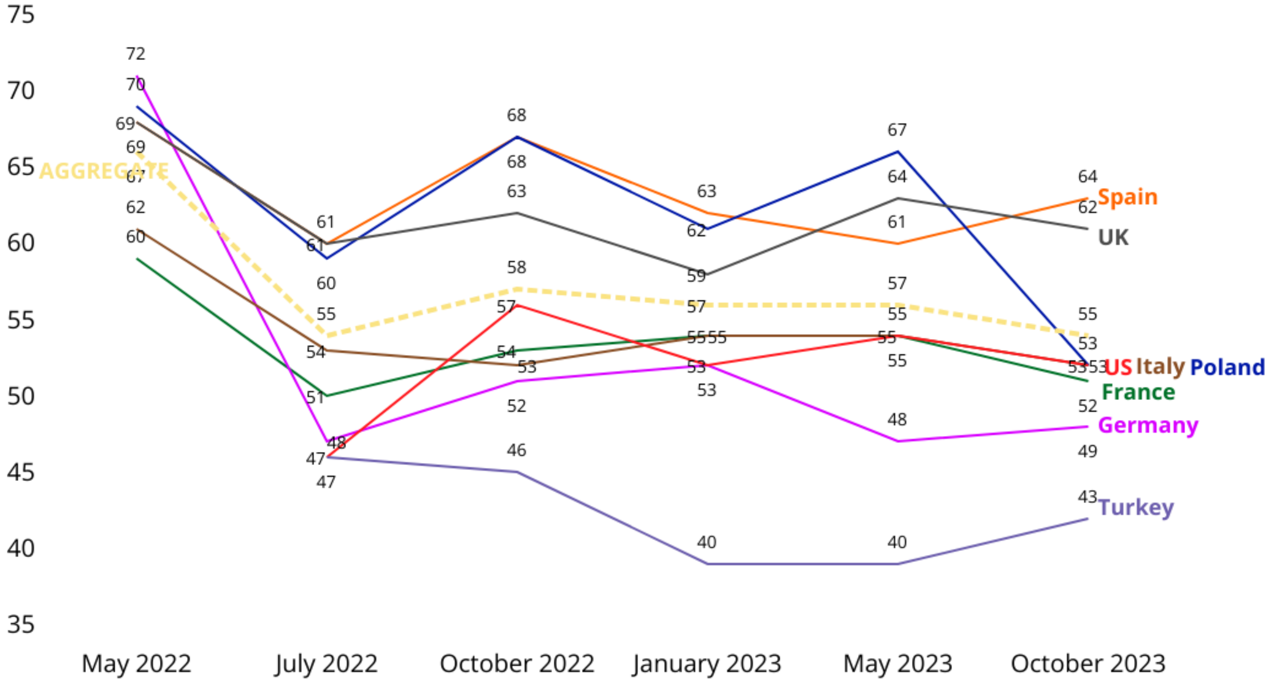
In Poland, while those who prefer alignment with America do have slightly higher levels of net support to most of the EU actions, even this group of respondents has low levels of support for many of the actions. On the other hand, both independently minded and those aligned with US leadership in Poland are strongly supportive of increasing sanctions and banning Russian fuel.

How will Russia, Ukraine, and the EU fare as a result of the war?

Respondents were asked whether Russia, Ukraine, and the EU will be better or worse off as a result of the war. Across the board, Ukraine is viewed as the most likely to be worse off, followed closely by Russia, and then the EU. In the aggregate, a 59% of European respondents say Ukraine will be slightly or much worse off as a result of the war, and 55% say the same about Russia. Forty-seven percent (47%) think the EU will be worse off.

While these opinions are mostly stable with respect to Russia, we find some reversal in the downward trend of concern that respondents have expressed over the past year with respect to Ukraine and the EU, with increasing percentages of respondents in most countries saying both Ukraine and the EU will be slightly or much worse off because of the war.

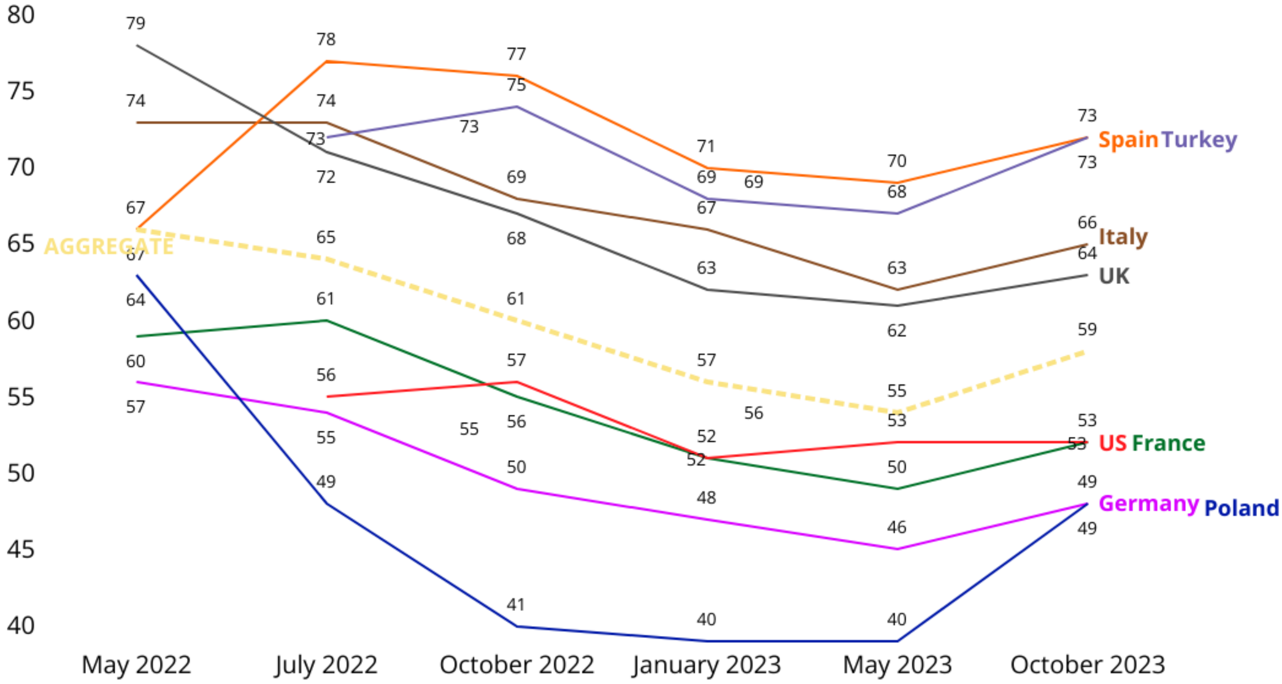
Russia will be slightly/much worse off



The percentage of those who say Russia will be worse off is now 55%, a slight tick down since the 57–58% who have held this view since October 2022. Percentages who say Russia will be slightly or much worse off are steadiest in the UK (62%), Italy (53%), and Germany (49%). We find a slight uptick in Spain (+3 to 64%) and slight downtick in France (-3 to 52%), and a very significant decline in Poland (-14 to 53%).

Attitudes in Turkey and the US are also slightly off, with 53% of American respondents (down 2) and 43% of Turkish respondents (up 3) saying that Russia will be slightly or much worse off as a result of the war.

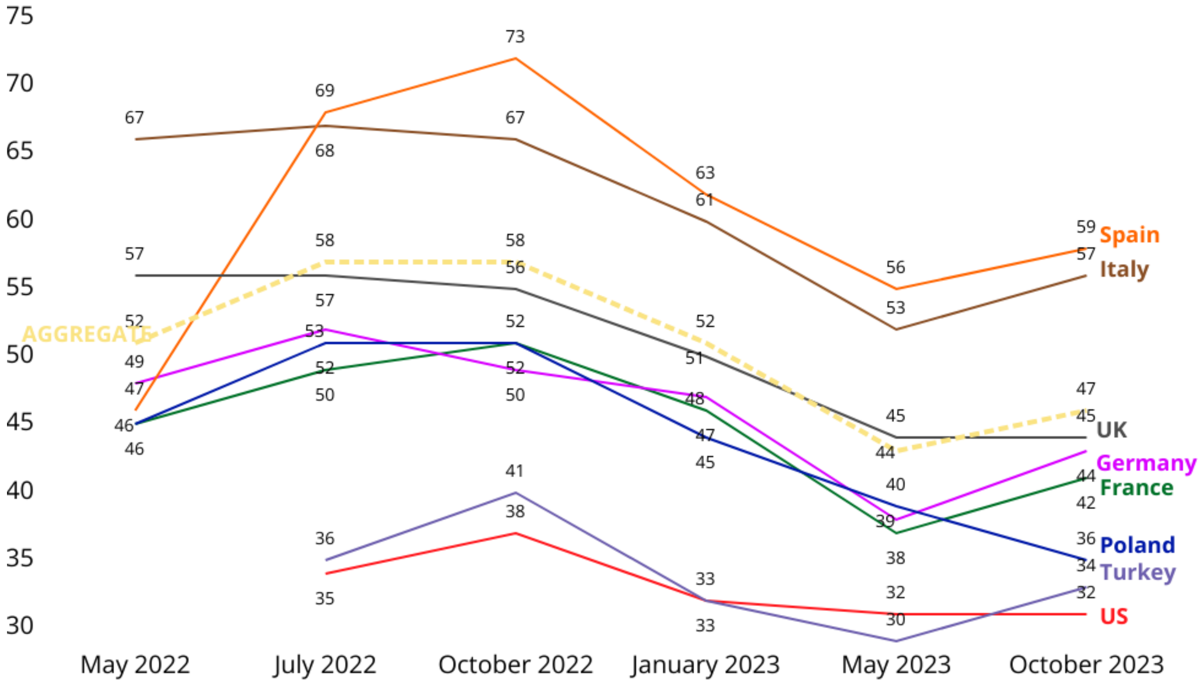
Ukraine will be slightly/much worse off



There is a clear reversal in attitudes about how Ukraine will fare because of the war. We find across the board increases for the first time in the percentages of respondents who say Ukraine will be slightly or much worse off because of the war—up 5 points in the aggregate since May to 59%. Increased concern about Ukraine is greatest in Poland (+9 to 49%), with 3-point increases in Spain (73%), Italy (66%), France (53%), and Germany (49%), and a 2-point uptick in the UK (64%).

Attitudes about how Ukraine will fare because of the war have remained stable in the US (53%), but jumped 5 points in Turkey (73%).

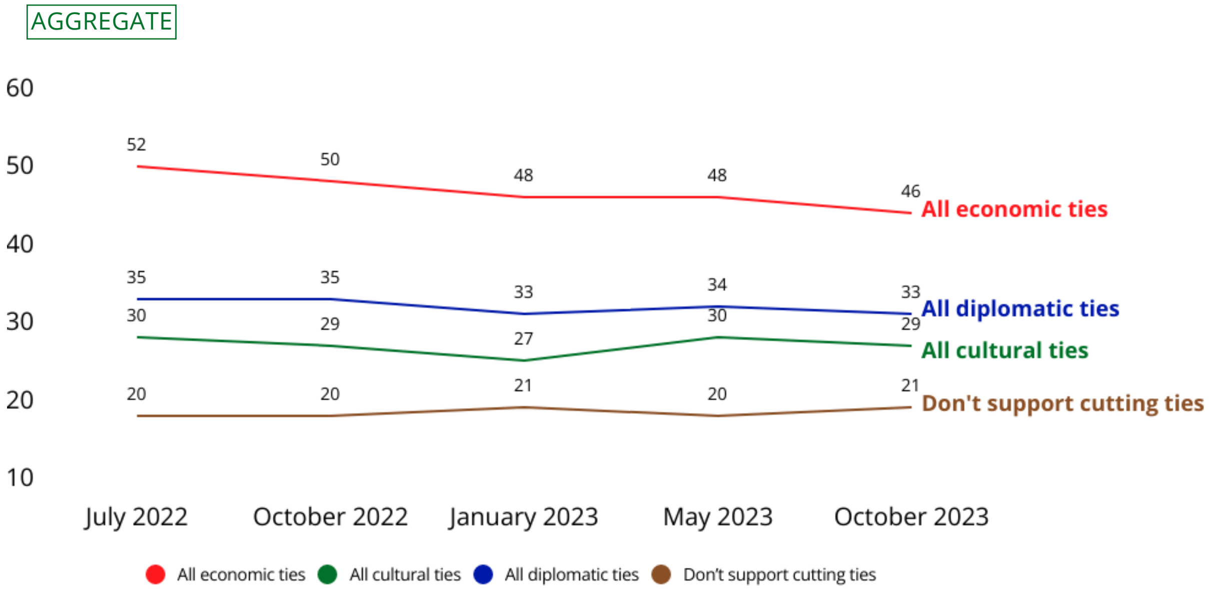
EU will be slightly/much worse off



There is a similar reversal evident with respect to how the EU will fare because of the war. After a year of declining numbers, in the aggregate, 47% of European respondents say the EU will be slightly or much worse off after the war, an increase of 3 points since May 2023. Rising concern for the EU is seen in Spain (+3 to 59%), Italy (+4 to 57%), Germany (+5 to 44%), and France (+4 to 42%). Concern has continued its descent in Poland, down another 4 points since May to 36%, and is stable in the UK (45%).

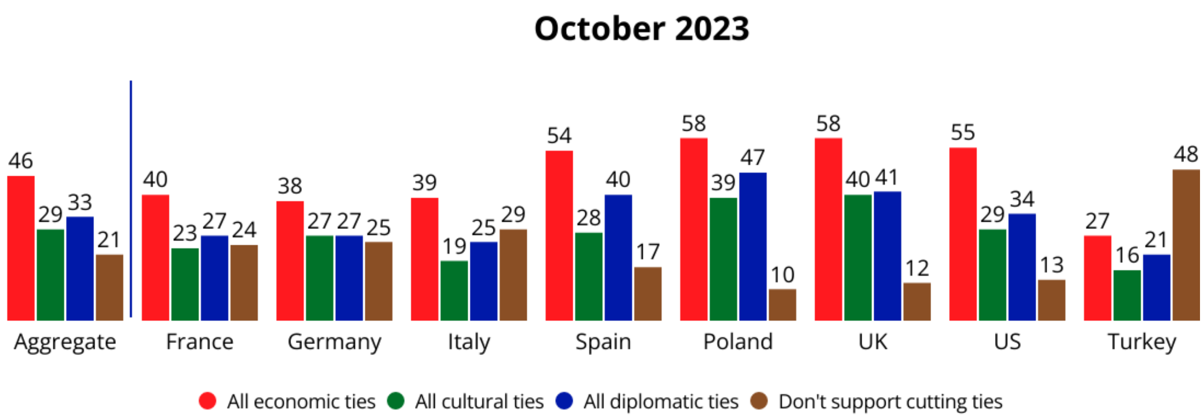
Respondents in the US and Turkey have consistently been the least likely to believe that the EU will fare poorly because of the war. This remains the case, though there is an uptick in Turkish concern (+4 to 34%), and a stable 32% in the US.

Which ties with Russia should be cut off as a result of the war in Ukraine?



Respondents could select all that apply (economic, cultural, diplomatic ties) or the option "I do not support cutting ties with Russia" or "I don't know."

Opinions regarding which ties with Russia should be cut off as a result of the war in Ukraine remain basically stable, though very small downticks are evident in most countries (1–2 points), and more significant declines are clear in Poland and Turkey. In the aggregate European data, 46% continue to think that all economic ties with Russia should be cut off, while smaller groups favor cutting off diplomatic ties (33%) and cultural ties (29%) and a consistent one-fifth (21%) continue to say they do not support cutting ties with Russia.



With respect to cutting all economic ties with Russia, attitudes are stable or slightly down in France, Germany, and Italy, where about four in 10 in each country want to sever such ties, and in Spain and the UK, where 54% and 58% respectively hold this view. In Poland, 58% are in favor of cutting economic ties, a decline of 9 points.

With respect to cultural and diplomatic ties, we find very slight downticks across the board, from 1–2 points.

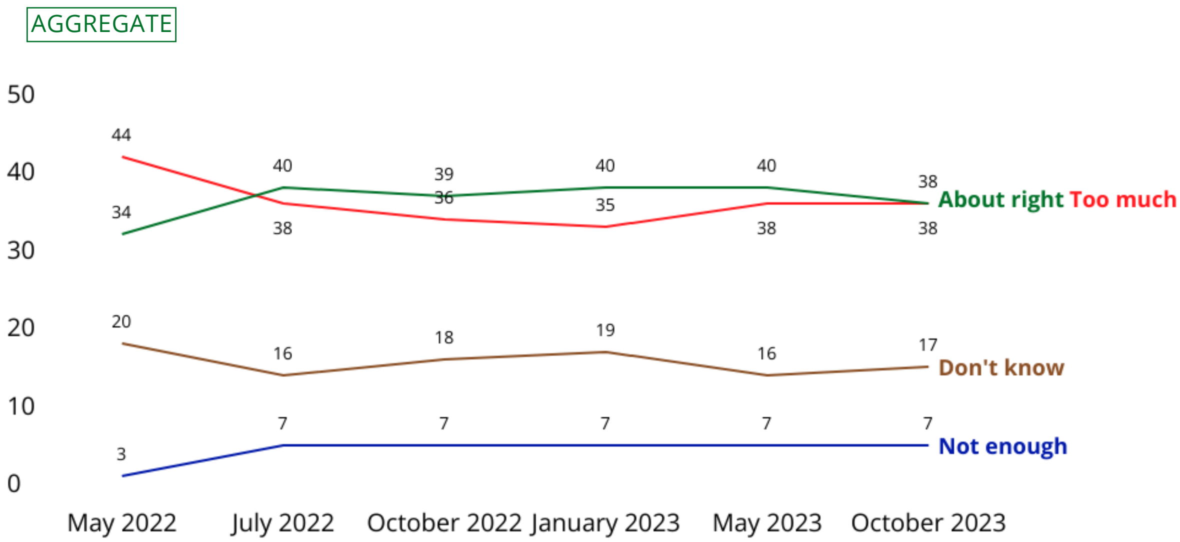
Overall, French, German, and Italian respondents are still the least supportive of cutting ties with Russia, with 38–40% in support of cutting economic ties, 25–27% in support of cutting diplomatic ties, and 19–27% in support of cutting cultural ties. Spain, Poland, and the UK are the most supportive of cutting ties, with 54–58% in support of cutting economic ties, 40–47% in support of cutting diplomatic ties, and 28–40% in support of cutting cultural ties.

Attitudes among US respondents are quite stable with 55% in support of severing economic ties, while about three in 10 support cutting diplomatic (34%) or cultural (29%) ties.

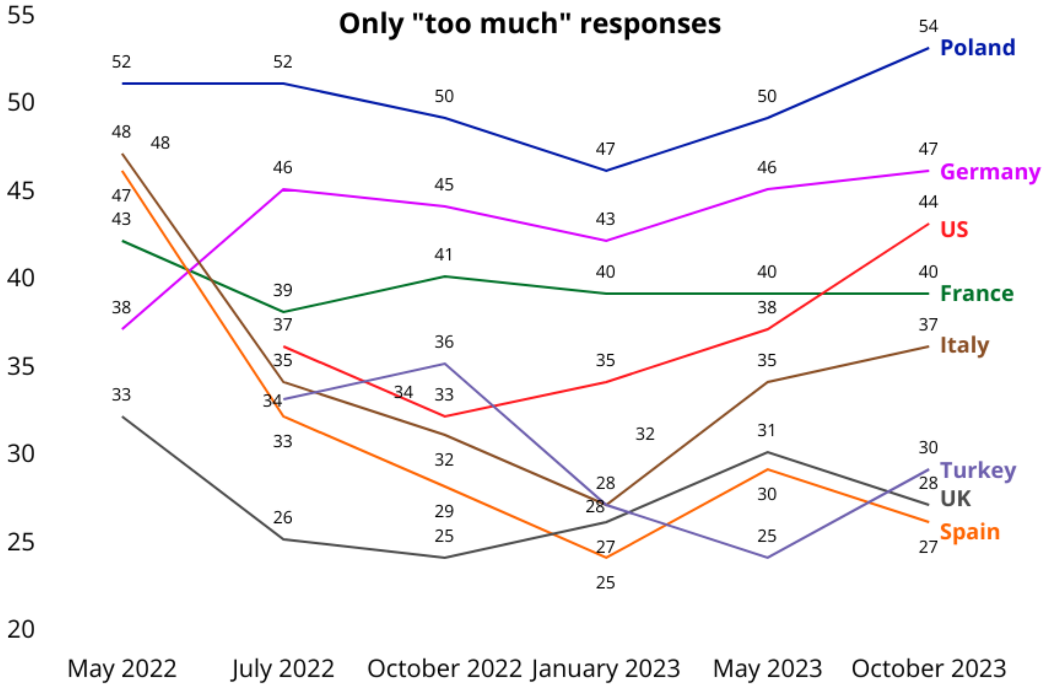
And again, we find only in Turkey a large group of respondents (48%, up another 6 points since May) who don't support cutting ties with Russia. In Turkey, support fell 4 points with respect to cutting economic, diplomatic, and cultural ties.

How much attention does your government dedicate to the war in Ukraine, compared to other problems its own citizens are facing?

- My government is focusing **too much** on the war in Ukraine and not enough on the problems facing its own citizens.
- My government is getting the balance **about right** between the war in Ukraine and the problems facing its own citizens.
- My government is focusing too much on the problems facing its own citizens and **not enough** on the war in Ukraine.
- Don't know



BY COUNTRY



In the aggregate, 38% of European respondents believe that their governments are focusing too much on the war in Ukraine and 38% believe that their governments are getting the balance. In the UK and Spain, there are slight declines in those who think their government is focusing too much on the war—down 3 points in each to 28% and 27%, respectively.

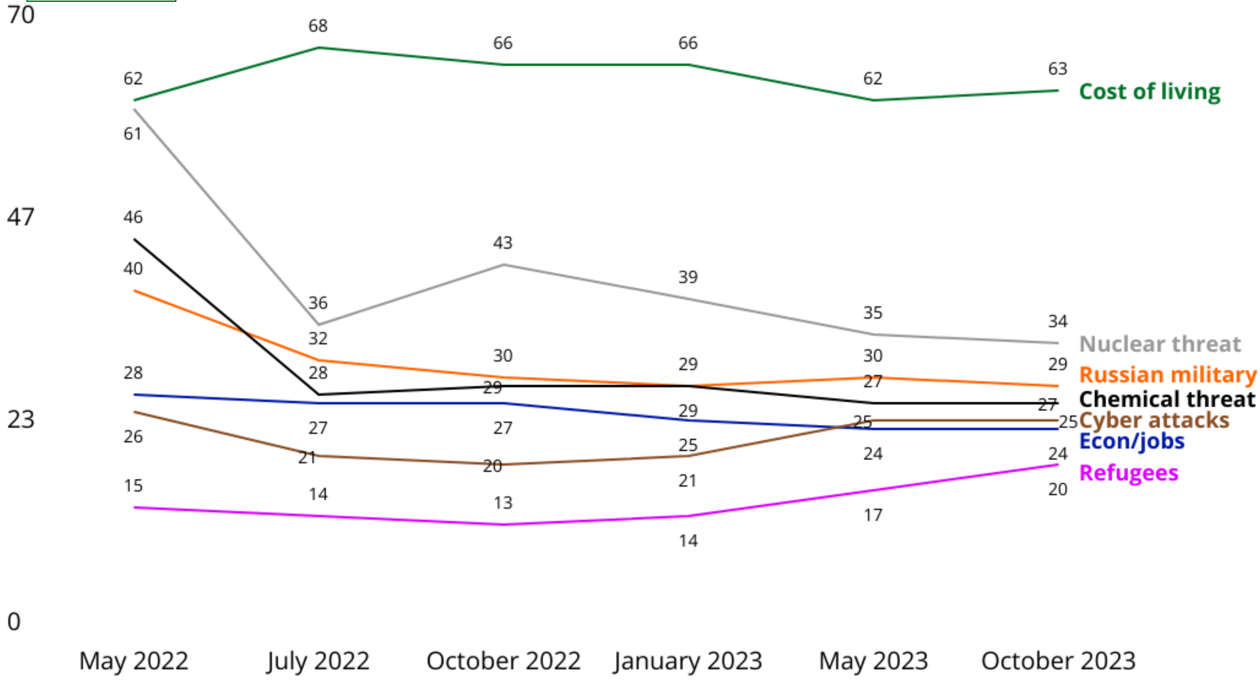
On the other hand, we find increases in those who say their governments are focusing too much on the Russia/Ukraine war in Poland (up 4 points to 54%), as well as in Turkey (up 5 points to 30%) and in the US (up 6 points to 44%).

The striking partisan divide among US respondents continues to be evident on this question. Among Republicans, 62% say the government is too focused on Ukraine—an increase of 7 points since May—and 21% say the balance is about right. On the other hand, 32% of Democrats say their government is focused too much on Ukraine and 49% say it has the right balance; this is an uptick of 5 points in those who say "too much" and a decline of 6 points in those who say "about right."

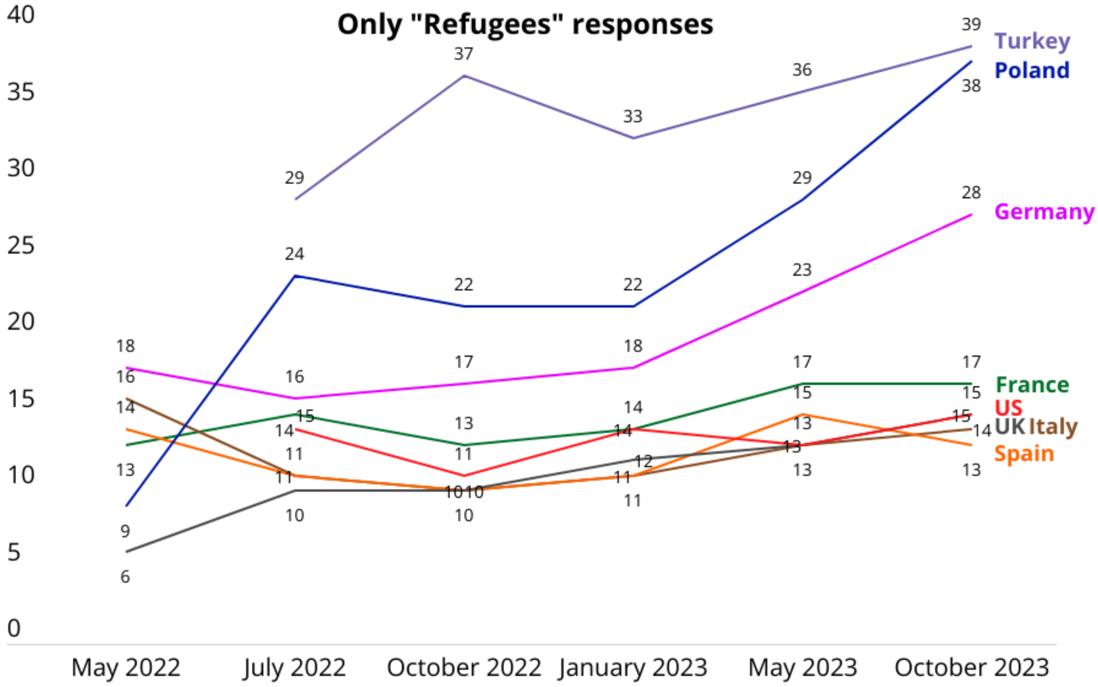
What are your biggest concerns in regards to the war in Ukraine? [Select up to three.]

- Economic downturn or losing my job
- Cost of living and higher energy prices
- Refugees from Ukraine moving to my country
- Russian retaliation through cyberattacks on my government or businesses in my country
- Threat of Russian military action aimed at my country
- Threat of the use of chemical weapons by Russia
- Threat of the use of nuclear weapons by Russia

AGGREGATE



BY COUNTRY



European respondents' top concerns resulting from the continued conflict remain the same. Cost of living and higher energy prices is the top concern—a view shared by 63% of the aggregate European respondents.

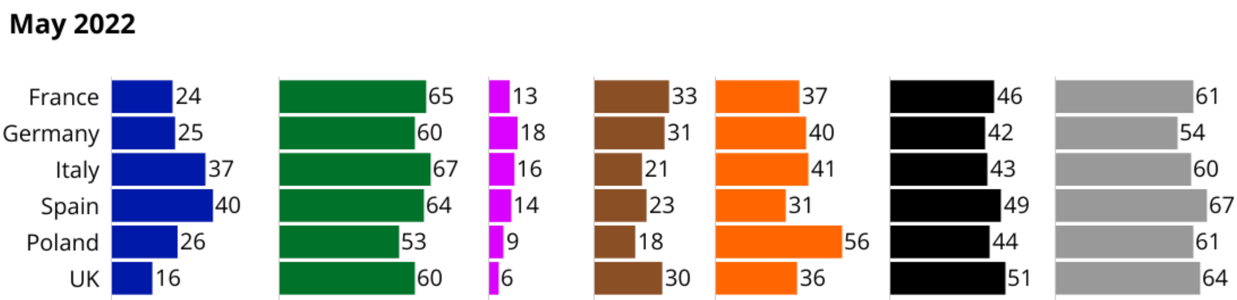
In the aggregate, this concern is followed, in order, by the Russian nuclear threat (34%), the threat of Russian military action against their country (29%), the threat of Russian use of chemical weapons (27%), the threat of Russian cyberattack directed at their country (25%), and an economic down-turn and loss of jobs (24%). The flood of Ukrainian refugees coming into their country remains the lowest concern (20%), though it continues to tick up slightly (up 3 points since May, a total of 7 points in the past year).

Europeans who are seeking compromise are concerned about the cost of living and higher energy prices at rates 6–9 points higher than for those who think the cost of war is worth it to stop Russian aggression (except in Poland). On the other hand, those who accept the costs of war are more concerned, by 7–11 points, about the nuclear threat posed by Russia. In France, Germany, Poland, and the UK in particular, respondents who want compromise are almost twice as likely as those willing to pay the costs of war to be concerned about refugees moving to their country, with particularly high levels of concern in Germany (31%, 2nd highest ranking concern) and Poland (43%)

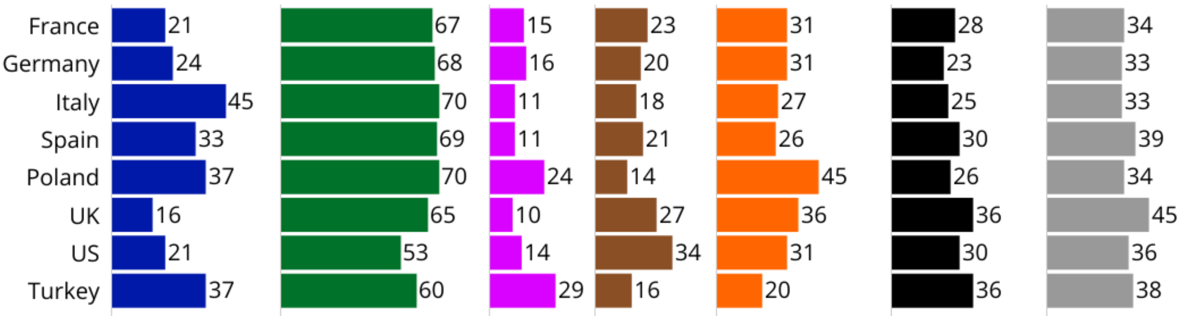
There is slightly increased concern about the cost of living in France (+3 to 66%), Germany (+3 to 62%), Italy (+2 to 66%), and Spain (+3 to 67%), but a notable decline in Poland (-8 to 53%).

Levels of reported concern are stable with respect to all the other issues, with the exception of "refugees from Ukraine moving into my country." Among respondents in Italy, Spain, France, and the UK, concern is still quite low, though it has grown over time. Concern about refugees in Germany and Poland has risen, and at a more accelerated pace. In Germany, concern rose from 17% last October to 28% in the current survey, including a bump of 5 points since May, and in Poland from 22% last October to 38% in the current survey, including a bump of 9 points since May.

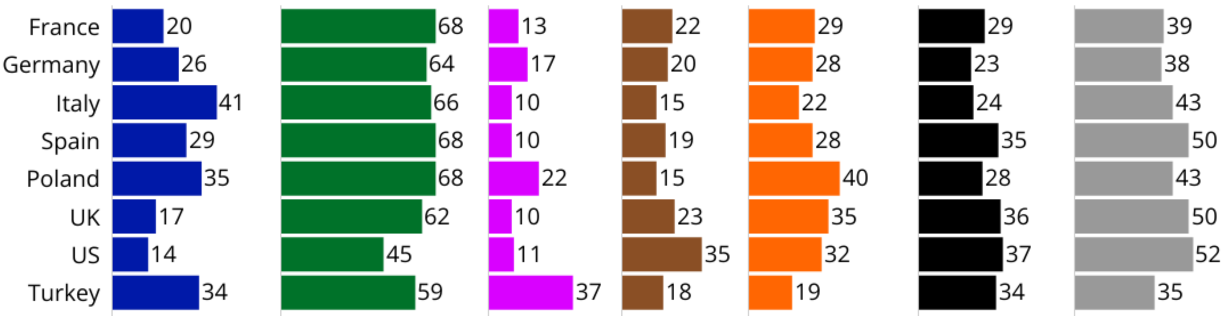
BY COUNTRY



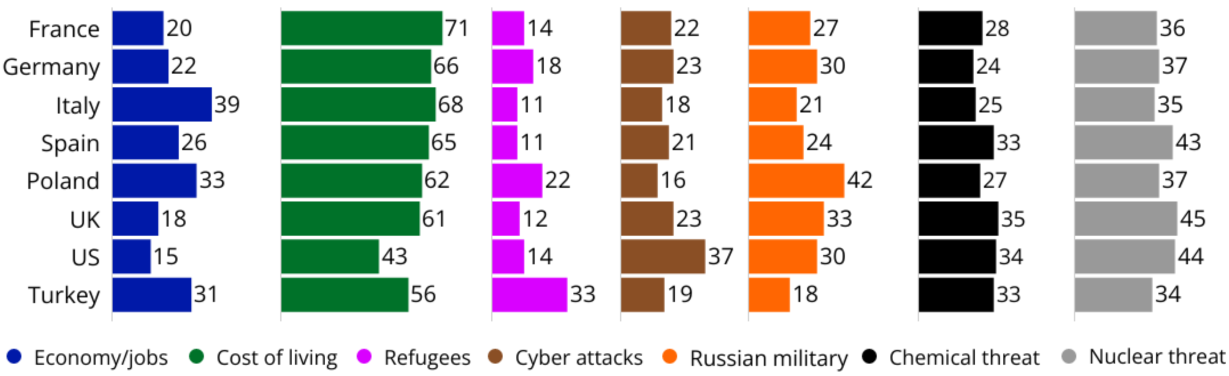
July 2022



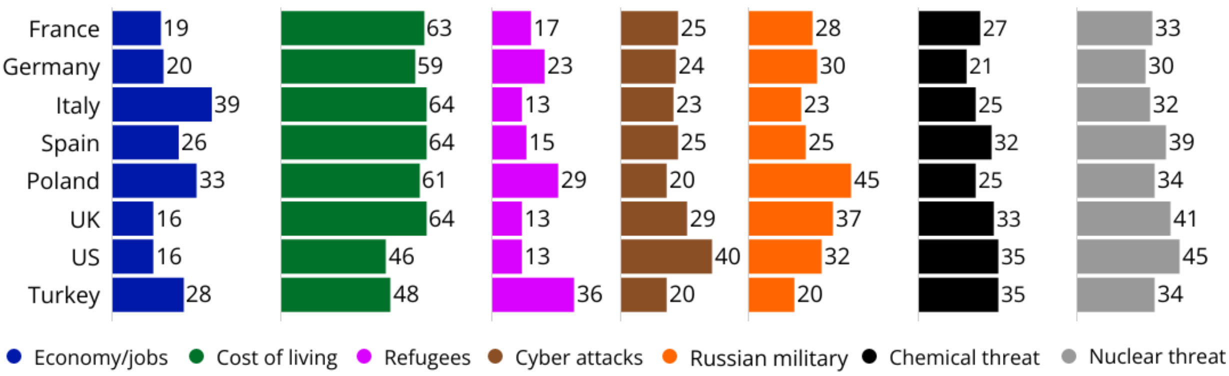
October 2022

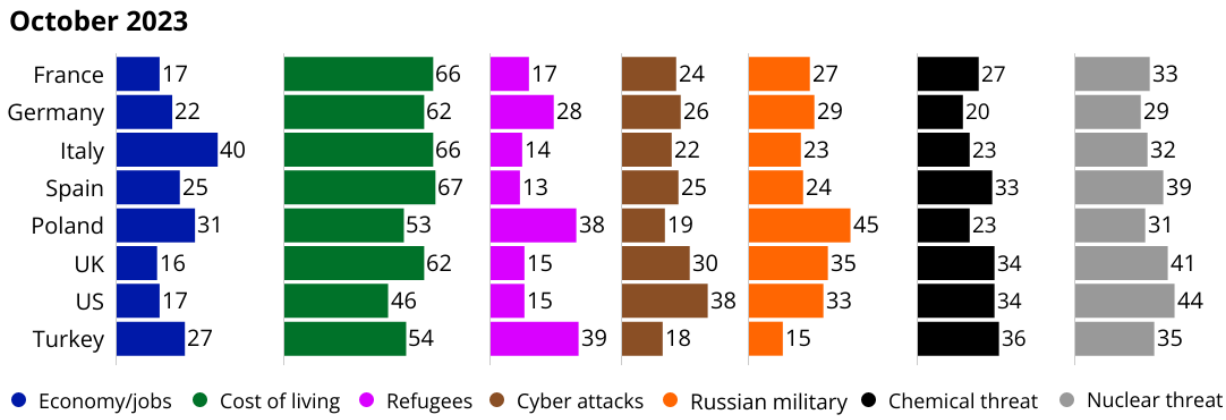


January 2023



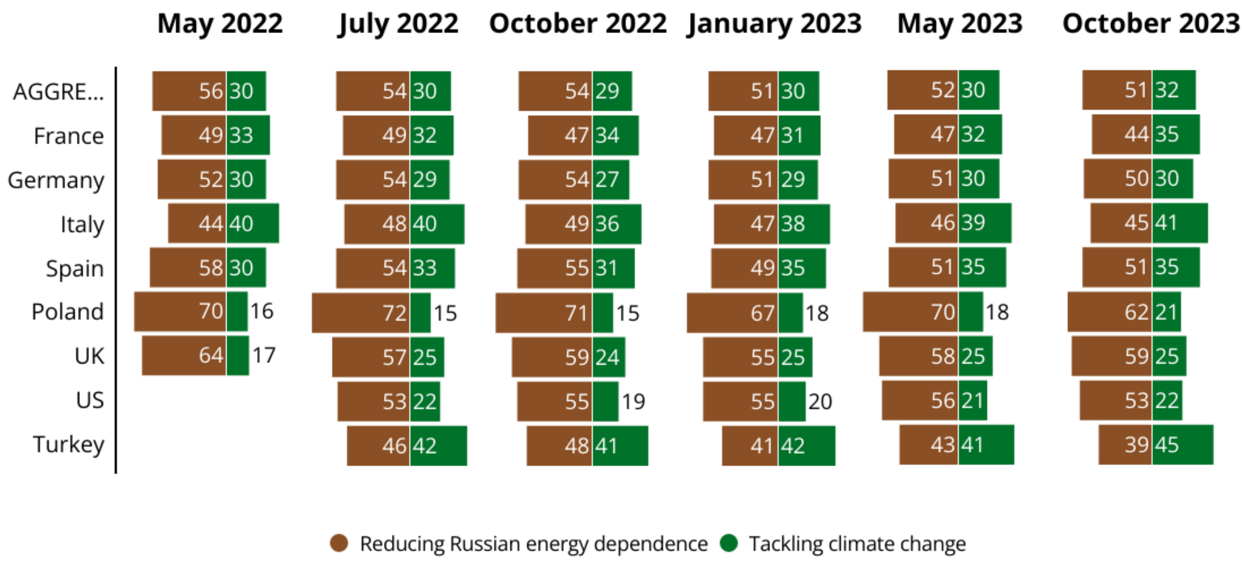
May 2023





What should be more important for the EU: reducing energy dependence on Russia or sticking to climate change policy goals?

- It is more important that the EU **reduces its dependence** on Russian oil and gas as soon as possible, even if it means a temporary increase in the use of our own fossil fuels like coal.
- It is more important that the EU continues to develop greener energy production to **tackle climate change**, even if it means continuing to rely on Russian oil and gas in the short term.
- Don't know



Sticking to climate policy goals continues to take a backseat to reducing dependence on Russian energy—both in the European aggregate and in each individual country. In the aggregate, 51% of European respondents say the priority ought to be reducing dependence on Russian energy, while 32% say its most important priority ought to be tackling climate change.

In the US, 53% of respondents favor reducing dependence on Russian oil, while 22% say tackling climate change is a more important priority. In Turkey, attitudes have shifted slightly from an even split in May 2023 to slightly leaning toward tackling climate change (45%) over reducing dependence on Russian energy (39%).

METHODOLOGY

This research was conducted via online, quantitative, proprietary, double opt-in survey panels. All respondents were invited via blinded email invitation or through a blinded portal experience. Survey respondents were routed through a de-duplication and respondent validation platform.

Country	Month	Date	N=	moe
France	May 22	4/28-5/5	1000	±3
	July 22	7/11-7/15	4991	±1.4
	Oct 22	10/3-10/4	5000	±1.4
	Jan 23	1/6-1/10	5001	±1.4
	May 23	5/16–5/20	5001	±1.4
	Oct 23	10/2–10/3	5009	±1.4
Germany	May 22	4/28-5/5	1000	±3
	July 22	7/11-7/16	5005	±1.4
	Oct 22	10/3-10/4	5001	±1.4
	Jan 23	1/6-1/13	5000	±1.4
	May 23	5/16–5/22	5002	±1.4
	Oct 23	10/2–10/3	5007	±1.4
Italy	May 22	4/28-5/6	1009	±3
	July 22	7/11-7/15	4110	±1.5
	Oct 22	10/3-10/4	4005	±1.6
	Jan 23	1/6-1/10	4004	±1.6
	May 23	5/16–5/21	4004	±1.6
	Oct 23	10/2–10/3	4002	±1.6
Spain	May 22	4/29-5/5	1050	±3
	July 22	7/11-7/15	2879	±1.8
	Oct 22	10/3-10/4	3006	±1.8
	Jan 23	1/6-1/13	3002	±1.8
	May 23	5/16–5/20	3002	±1.8
	Oct 23	10/2–10/3	3003	±1.8

Country	Month	Date	N=	moe
Poland	May 22	4/29-5/5	1002	±3
	July 22	7/11-7/15	1926	±2.2
	Oct 22	10/3-10/4	2001	±2.2
	Jan 23	1/6-1/7	2002	±2.2
	May 23	5/16–5/20	2000	±2.2
	Oct 23	10/2–10/3	2001	±2.2
UK	May 22	5/10-5/11	1103	±3
	July 22	7/29-7/30	4007	±1.6
	Oct 22	10/3-10/4	5002	±1.4
	Jan 23	1/6-1/10	5000	±1.4
	May 23	5/16–5/23	5003	±1.4
	Oct 23	10/2–10/3	5001	±1.4
US	July 22	7/11-7/15	5314	±1.3
	Oct 22	10/3-10/4	5002	±1.4
	Jan 23	1/6-1/10	5007	±1.4
	May 23	5/16–5/20	5009	±1.4
	Oct 23	10/2–10/3	5000	±1.4
Turkey	July 22	7/11-7/15	1787	±2.3
	Oct 22	10/3-10/4	1504	±2.5
	Jan 23	1/6-1/7	1500	±2.5
	May 23	5/16–5/20	1501	±2.5
	Oct 23	10/2–10/3	1504	±2.5

DEMOGRAPHICS

October 2023

	France	Germany	Italy	Spain	Poland	UK	US	Turkey
Male	49	52	50	49	50	49	49	50
Female	50	47	49	51	49	50	50	49
Other	1	1	1	<1	1	1	1	1
Under 30	21	34	25	23	51	24	21	35
30-44	32	33	32	39	31	35	28	50
45+	46	33	43	38	18	41	51	15

May 2023

	France	Germany	Italy	Spain	Poland	UK	US	Turkey
Male	50	51	48	50	48	50	50	50
Female	50	48	50	50	51	50	49	50
Other	<1	1	<1	1	1	1	1	<1
Under 30	27	42	21	27	40	26	19	41
30-44	31	30	33	39	39	32	24	46
45+	43	28	46	34	21	42	57	13

January 2023

	France	Germany	Italy	Spain	Poland	UK	US	Turkey
Male	50	47	49	48	49	49	50	50
Female	50	52	50	51	50	49	49	50
Other	<1	1	1	1	1	1	1	<1
Under 30	20	33	25	31	38	32	22	40
30-44	38	36	34	37	38	34	25	47
45+	42	32	41	32	23	34	53	13

October 2022

	France	Germany	Italy	Spain	Poland	UK	US	Turkey
Male	50	51	50	50	52	50	50	50
Female	50	48	50	50	48	50	50	50
Other	<1	1	1	<1	1	1	1	<1
Under 30	29	37	33	29	39	27	17	33
30-44	37	34	31	39	39	36	26	49
45+	34	28	36	32	22	38	57	19

July 2022

	France	Germany	Italy	Spain	Poland	UK	US	Turkey
Male	50	45	48	51	47	44	50	50
Female	50	54	51	48	52	56	50	50
Other	<1	1	1	1	1	1	1	<1
Under 30	30	37	32	32	39	24	33	39
30-44	36	39	34	37	37	28	29	47
45+	35	24	34	32	24	49	39	14