

eupinions slides

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Ukraine Trends September 2023

Monitoring Europeans' Support for Ukraine
and Ukrainians: Data Updated Every Quarter
since March 2022

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Will public support for Ukraine continue?

How has it evolved over the last 18 months?

These are the questions posed by many analysts as the war in Ukraine continues.

In the following graphs, we show how ongoing debates on energy security, energy-saving measures, and efforts to support Ukraine in defending itself against Russian aggression have influenced opinions across Europe from March 2022 to September 2023.

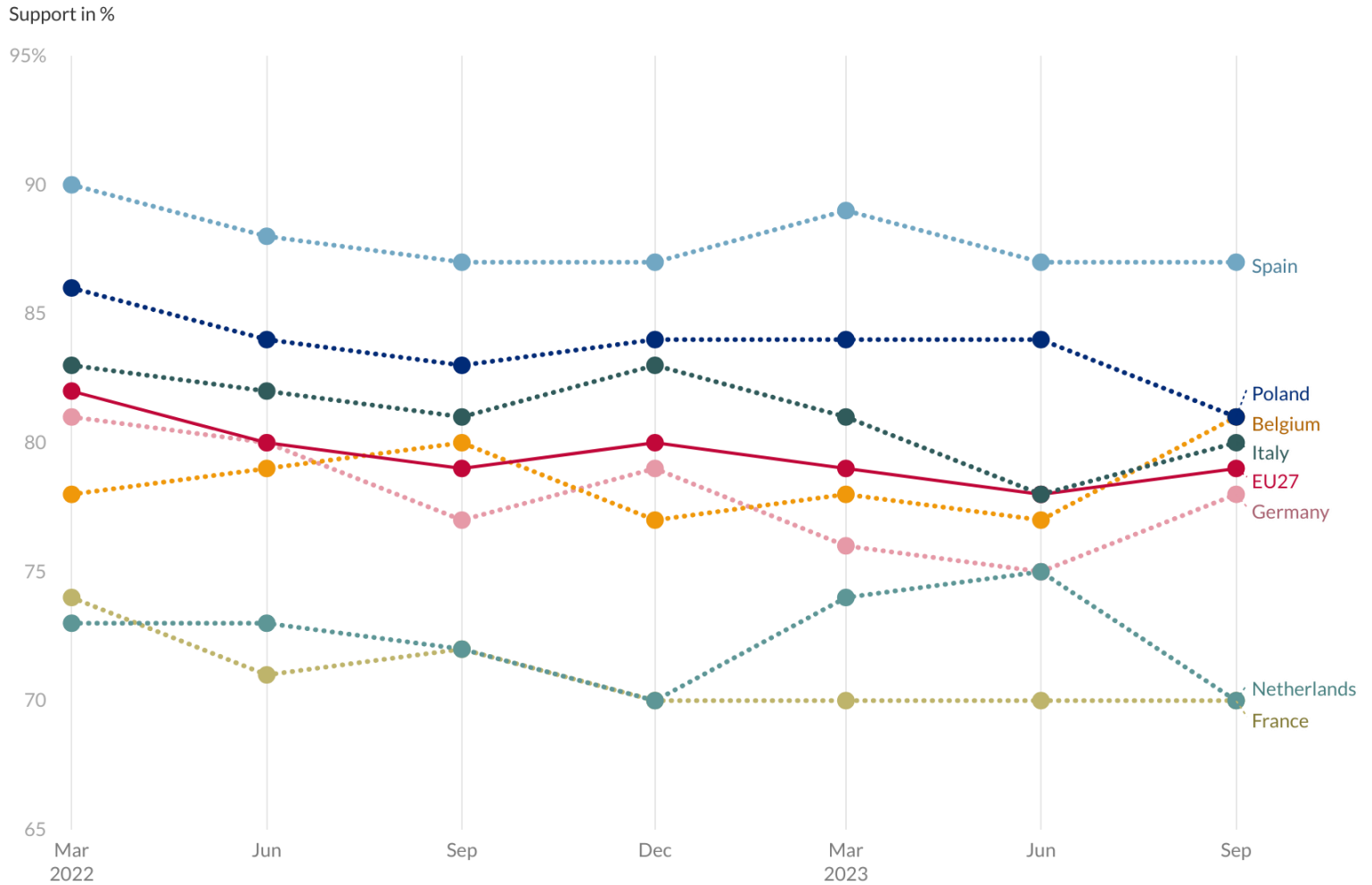
We regularly update this data on a quarterly basis to provide insights into the latest trends in EU sentiments toward Ukraine. However, in this edition, we focus on examining how this data has evolved over the 18-month period mentioned.

These questions can be categorized into two key areas of concern:

1. The EU's role on the global stage and its ability to reinforce that role
2. The policies designed to support Ukraine in its war effort, including aspects such as weapons delivery, refugee acceptance, energy independence, economic and financial sanctions, EU enlargement and the development of a common European defence policy

It's important to note that the most recent data featured in this report was collected in September 2023, just before the Hamas terrorist attack on Israel. In the coming months, we will closely monitor the extent to which this new security crisis may impact the attitudes of EU citizens.

EU27: The European Union should play a more active role in world affairs.

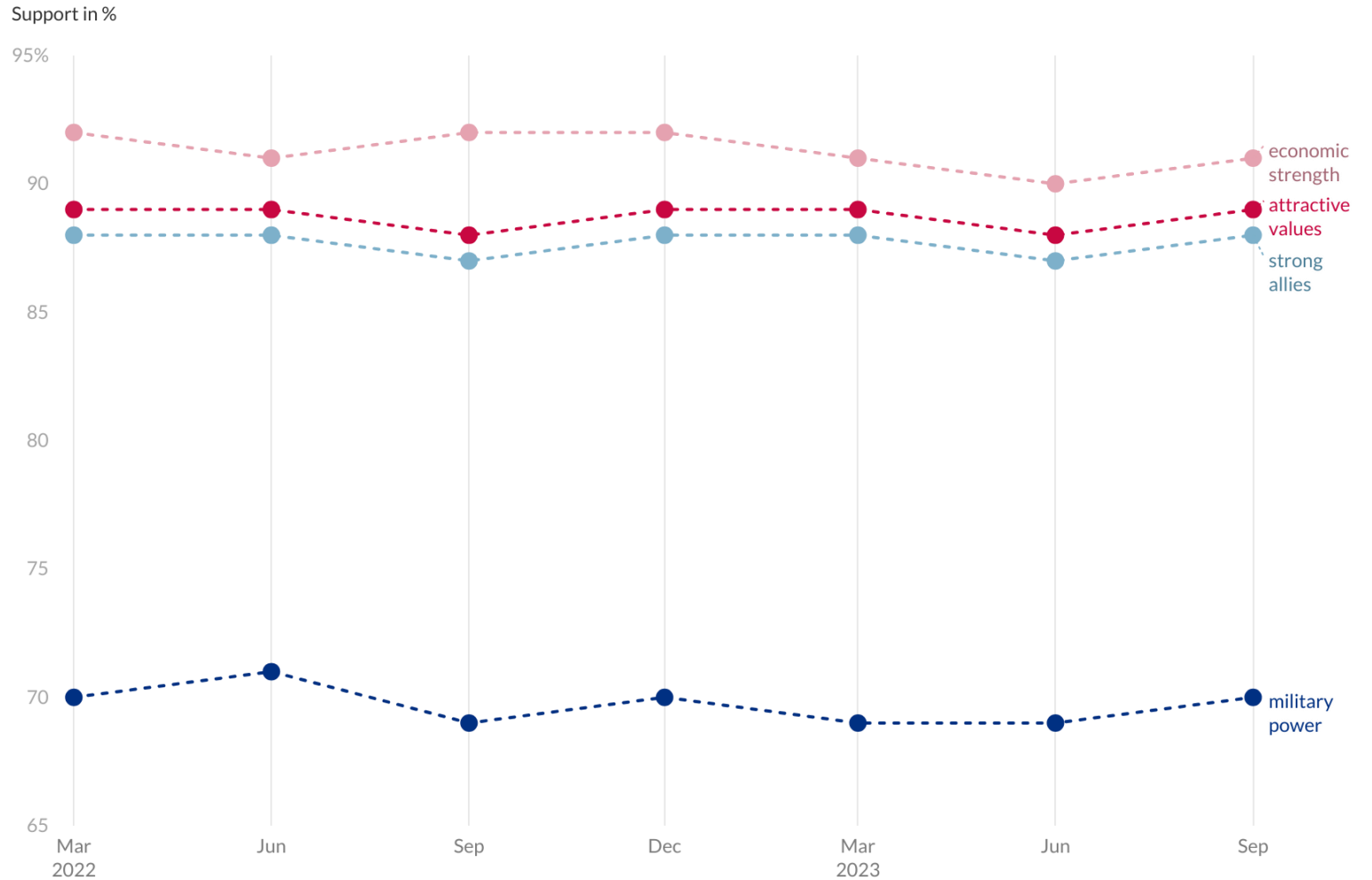


For single data points, please check the appendix.

Europeans continue to support the idea of the EU being an active player in global affairs

- This issue has been a consistent theme in our catalogue of trends tracked since 2015 (cf. eupinions.eu/de/trends).
- Overall, a large majority of Europeans have continued to endorse the idea of the EU assuming a more prominent role in global matters (79% in September 2023).
- The level of support varies across countries, ranging from 70% in France and the Netherlands to 87% in Spain.
- This support has shown remarkable resilience, remaining high and steadfast throughout the last 18 months.

EU27: For the European Union to play a more active role in world affairs, it needs ...

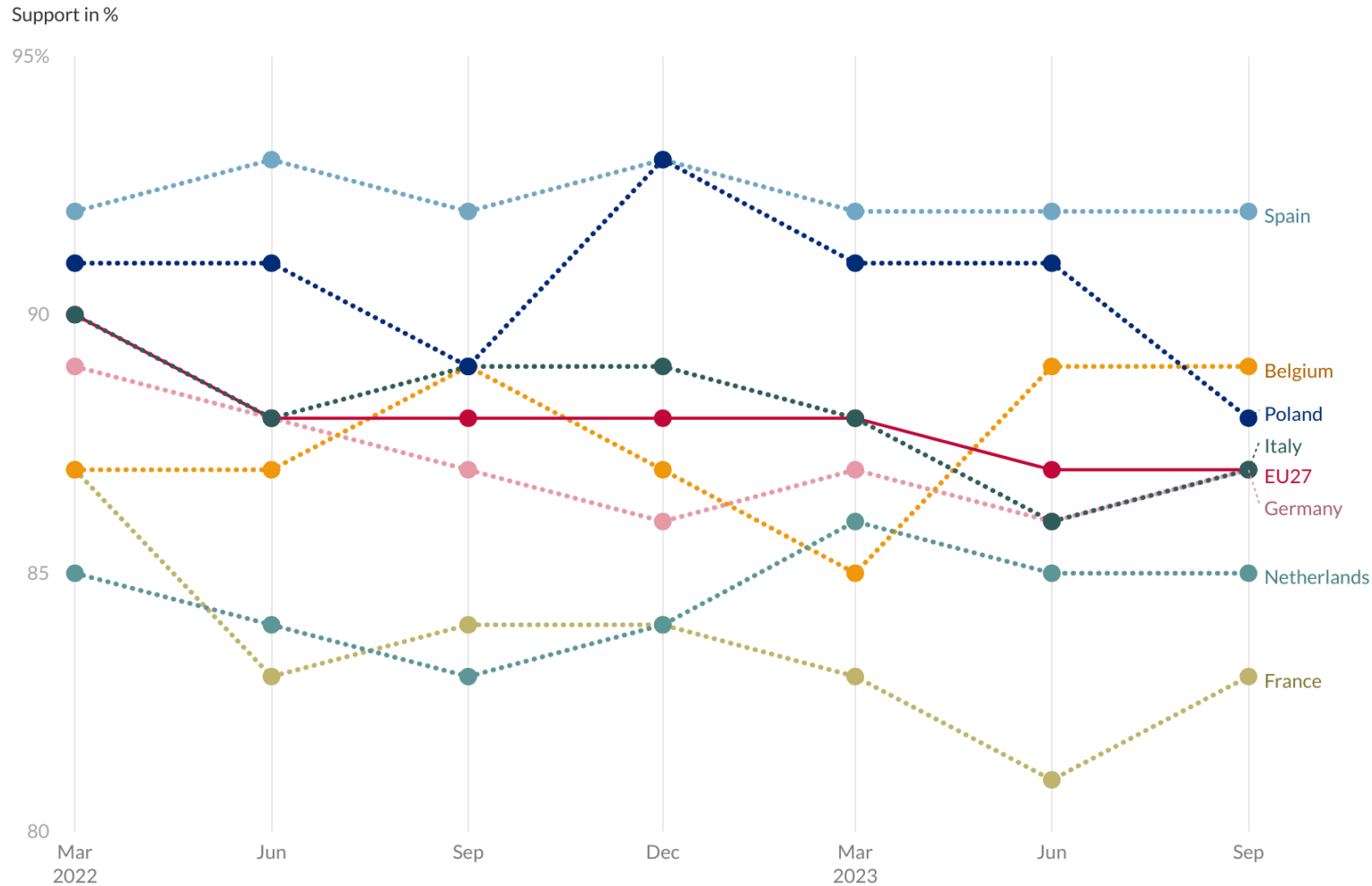


For single data points, please check the appendix.

European views on the means of power unchanged

- Europeans consistently hold the view that the EU should leverage both soft and hard power to be more active globally.
- Nearly 70% of respondents believe that the EU should possess military power, with support varying by country (not displayed in the graph), ranging from 59% in Italy to 79% in Poland.
- Nearly 90% believe that economic strength, strong allies, and attractive values are crucial. Here, the country-specific values (not displayed in the graph) exhibit relatively minor variations (economic strength: 83% in the Netherlands, peaking at 93% in Poland and Spain / strong allies: from 83% in Italy to 90% in Poland and Spain / attractive values: from 86% in France to 91% in Poland).

EU27: The European Union needs a common defence policy.

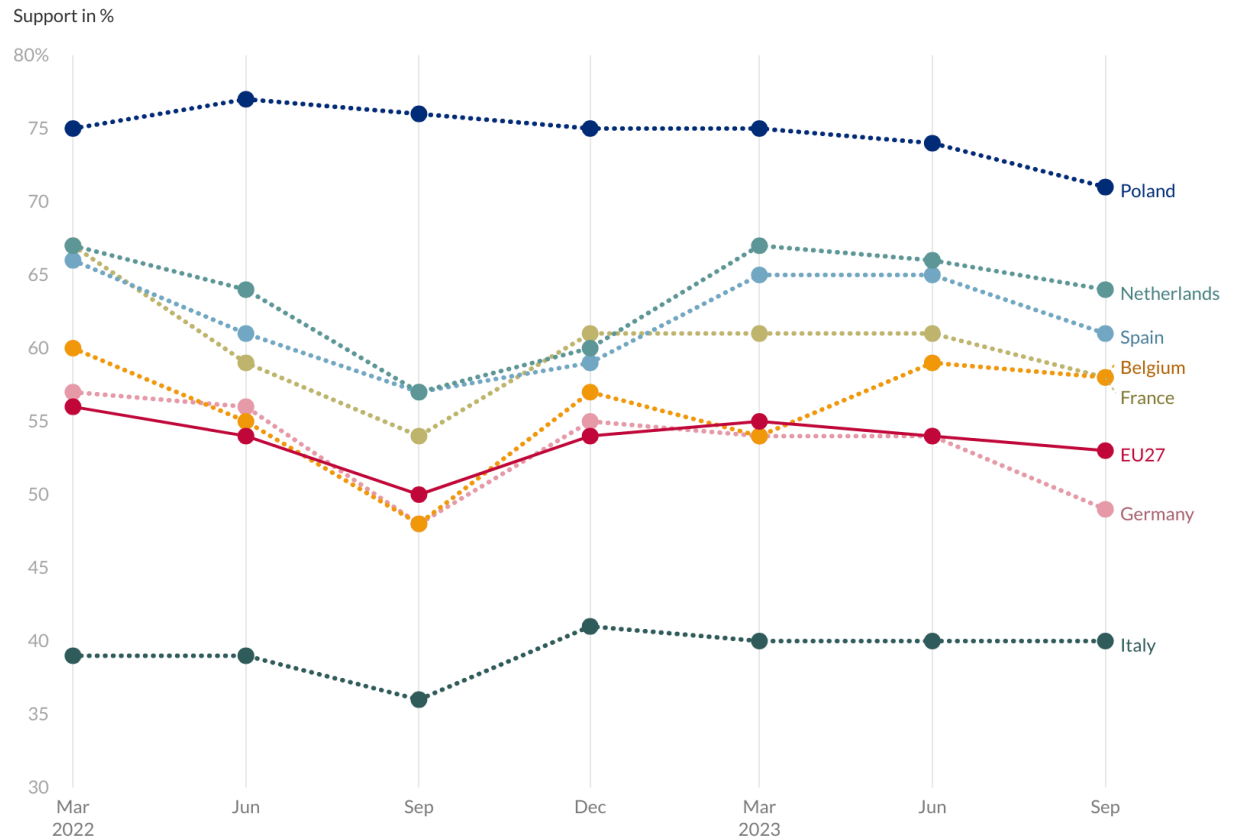


For single data points, please check the appendix.

Strong support for EU defence policy

- Almost 90% of Europeans believe the EU needs a common defence policy.
- Support for this remains consistently high over time.
- There is only little variance on this between member states.
- Spain and Poland demonstrate the highest levels of support (92% and 88%, respectively, as of September 2023). France shows the lowest level of support (83%).

EU27: Should your country support Ukraine by delivering weapons?

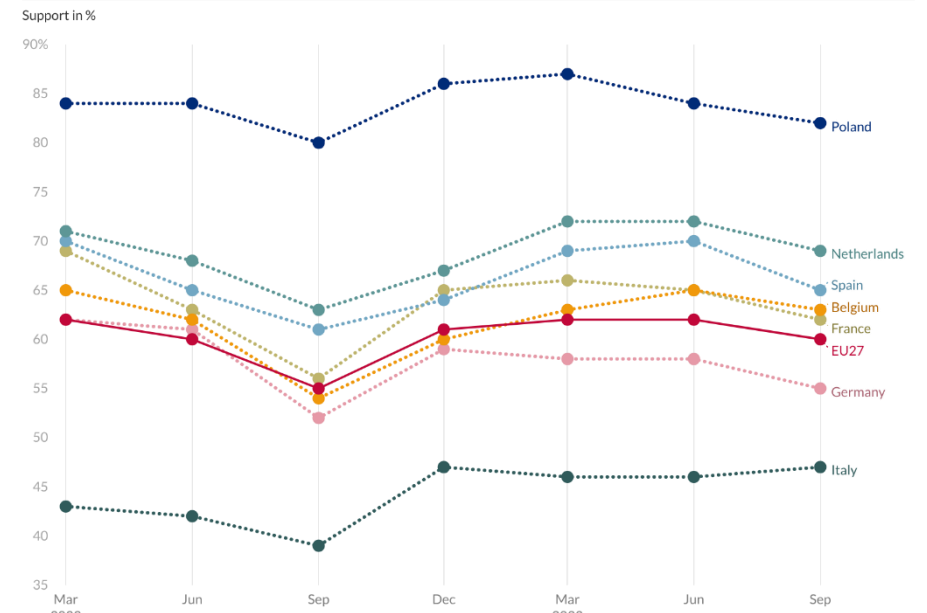


For single data points, please check the appendix.

Europeans are more cautious about supplying weapons

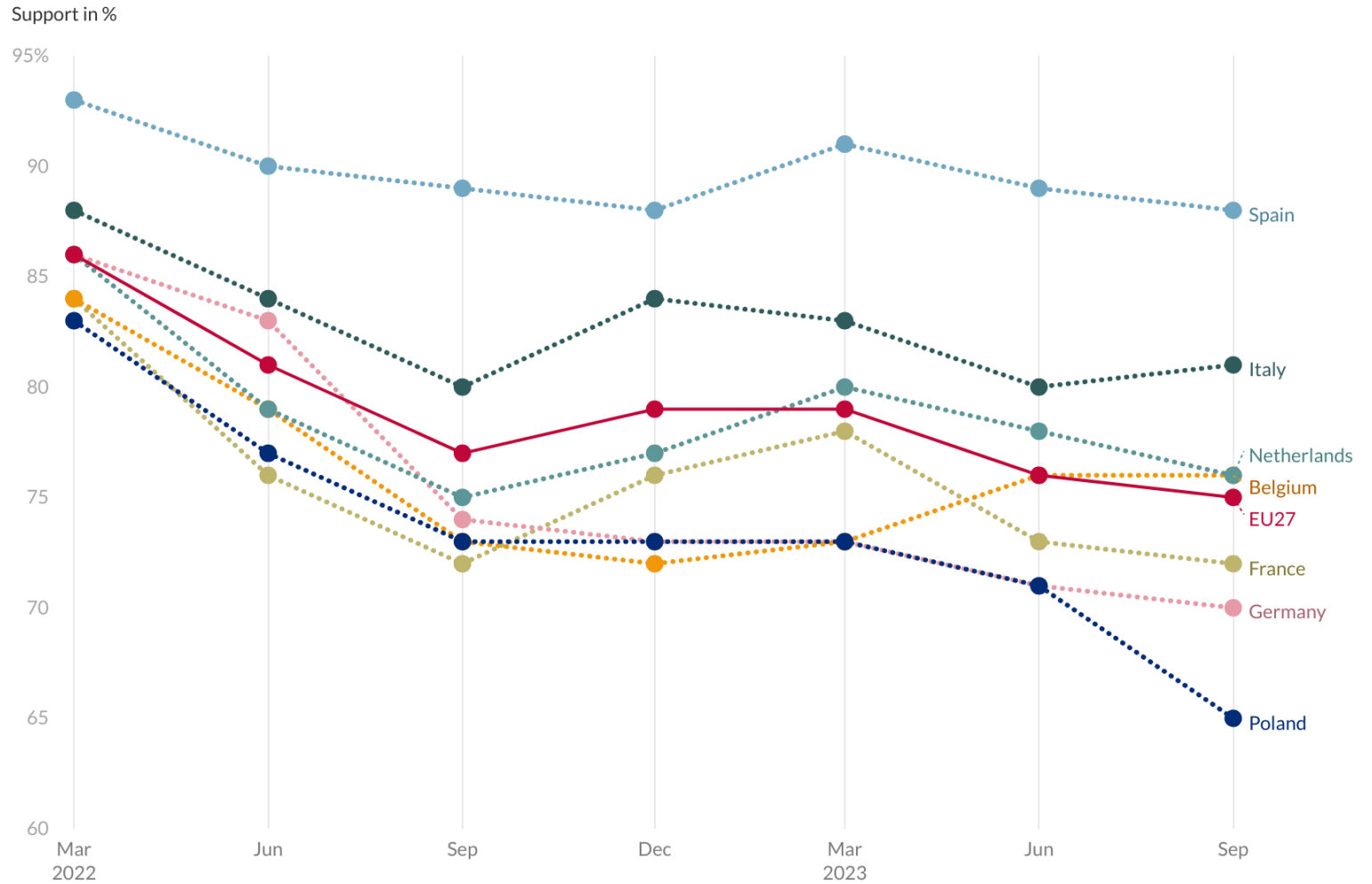
Across the EU, support for providing weapons to Ukraine dropped somewhat in the fall of 2022. By March 23, it had bounced back, nearly reaching the level recorded in the spring of 2022 with a slight downward trend since then. Poles have consistently been the most supportive of this stance, with 71% in favour as of September 2023 (“EU27: Should your country...”), while Italians expressed the lowest level of support, at 40%.

EU27: Should the EU support Ukraine by delivering weapons?



For single data points, please check the appendix.

EU27: Should your country accept refugees from Ukraine?

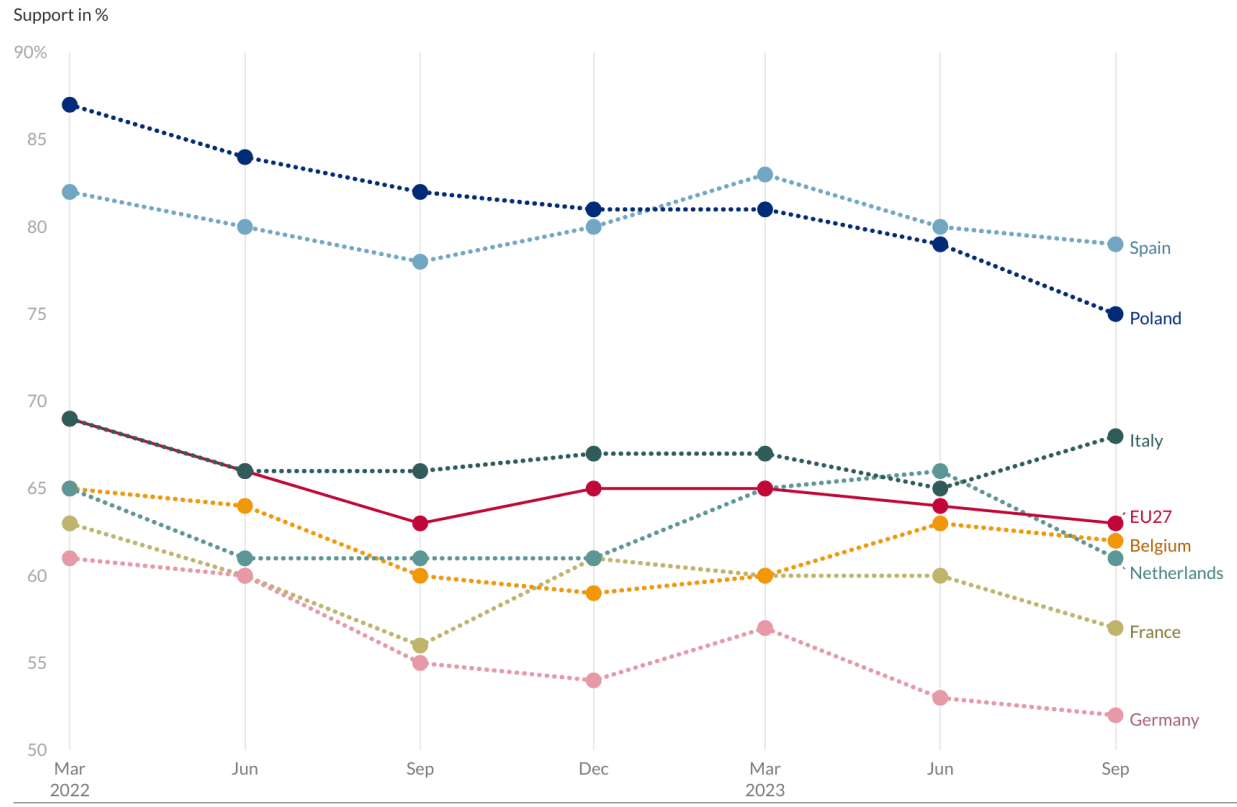


For single data points, please check the appendix.

Willingness to accept war refugees is on the decline

- But it still maintains a high level of support, exceeding 65%.
- EU-wide, support has dropped by 11 percentage points within 18 months (86% to 75%).
- Poland has seen the most substantial decrease in support (18-point drop, 83% to 65%). Germany saw a 16-point drop (86% to 70%) and France a 12-point decline (84% to 72%).

EU27: Should the EU accept Ukraine as a member of the EU in the coming years?

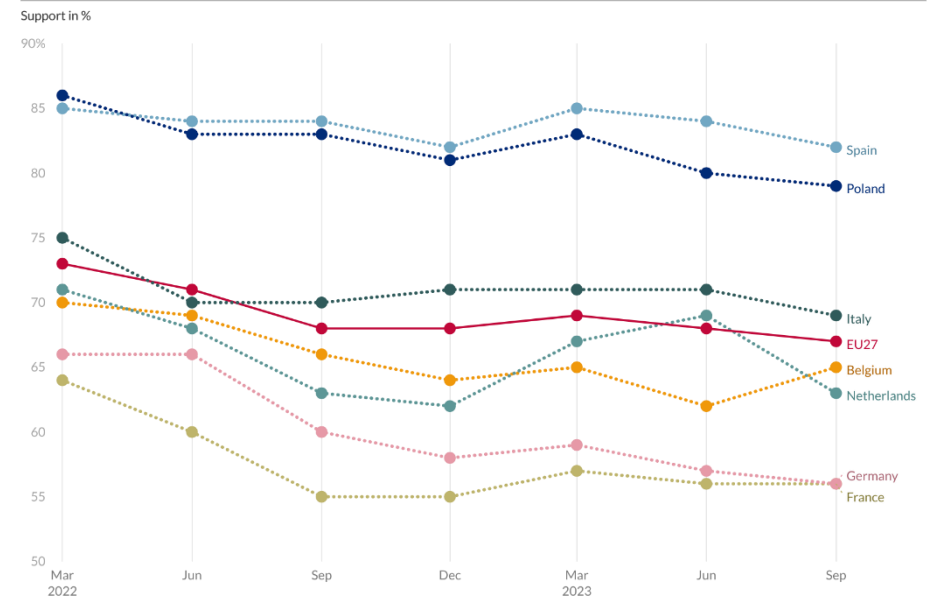


For single data points, please check the appendix.

EU enlargement supported by a clear majority, less so in Germany and France

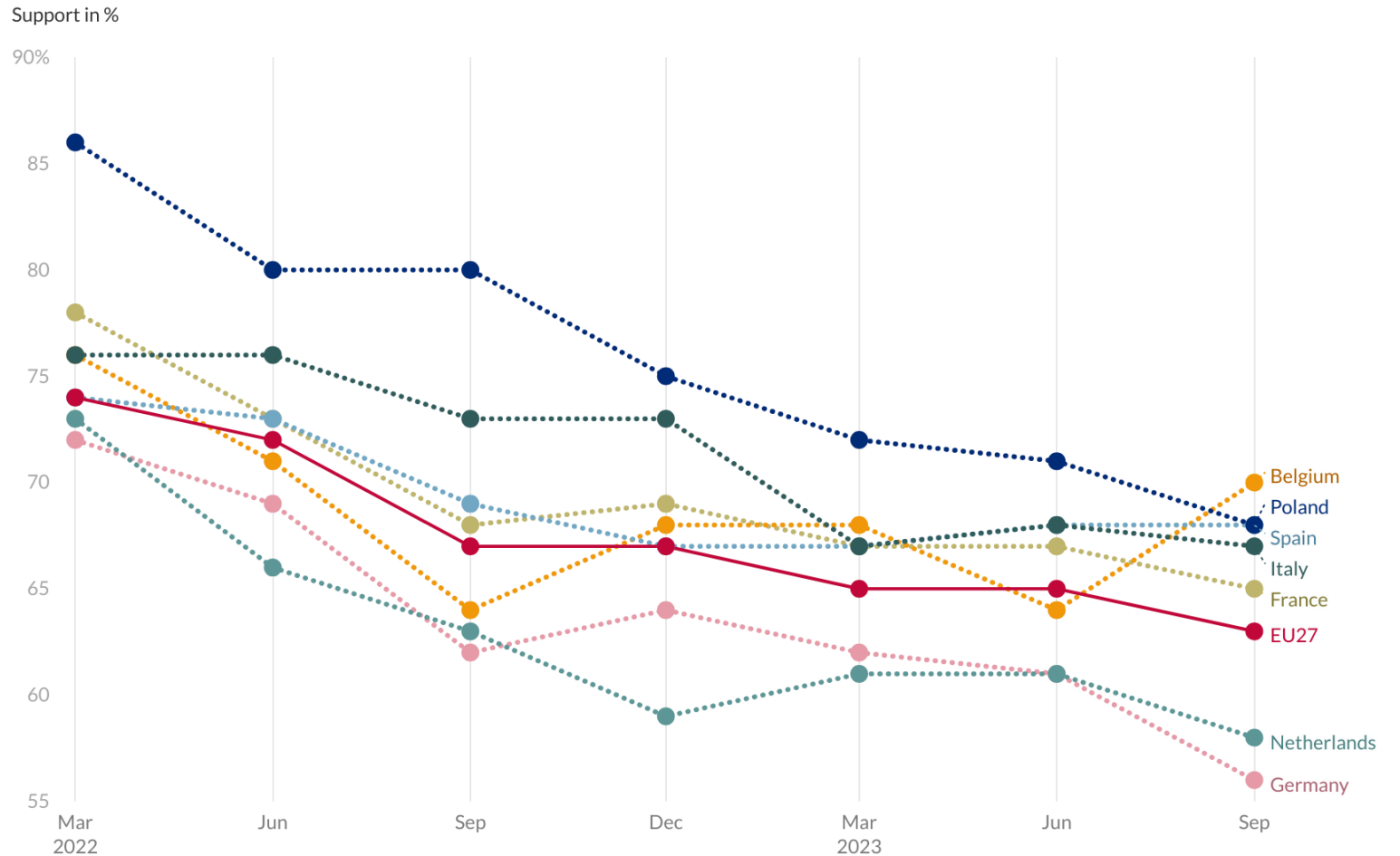
Across the EU, support for Ukraine's integration into the EU has slipped from 69% in March 2022 but has remained steady at nearly 65% since last winter. Support is highest in Spain and Poland (79% and 75%, respectively, as of September 2023) and lowest in Germany (52%).

EU27: Should the EU accept new member states in the coming years?



For single data points, please check the appendix.

EU27: Should the EU seek to become more energy-independent even if that means costs are rising further?

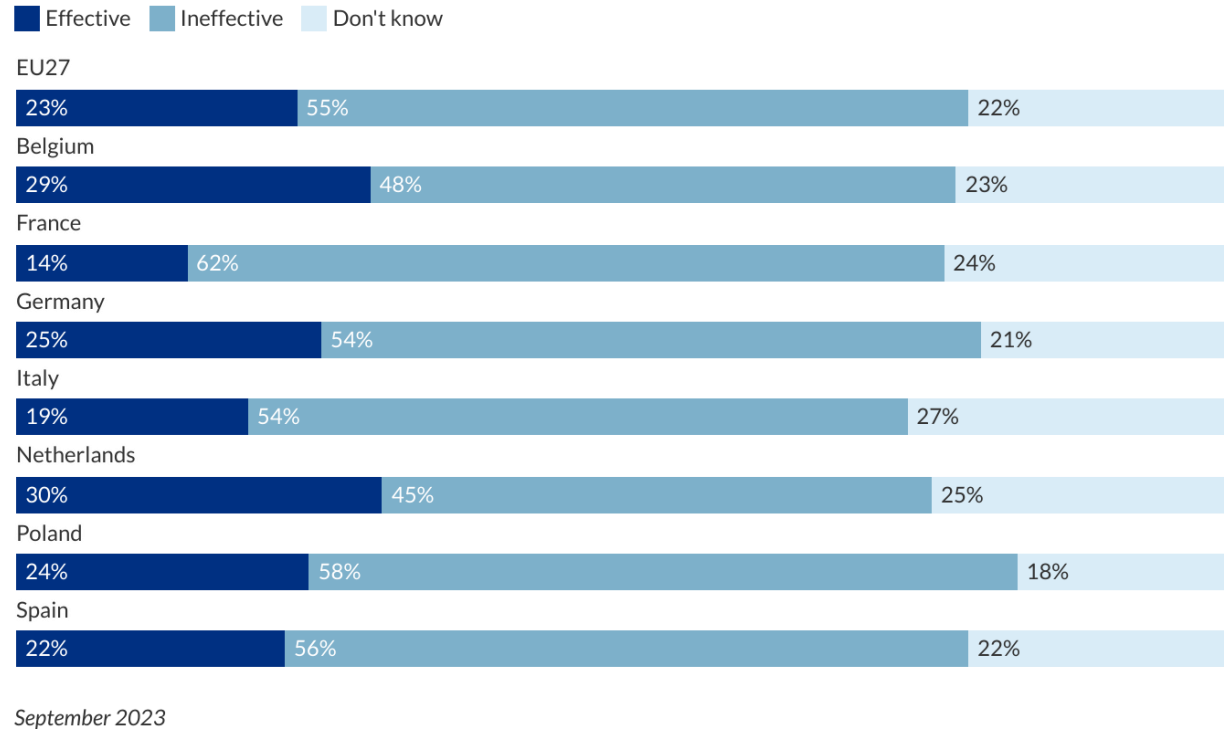


For single data points, please check the appendix.

EU-wide support for energy independence has dropped by 11 percentage points since March 2022

- Support for energy independence remains high (63% EU-wide and above 55% in each member state).
- But high energy prices has taken a toll in the last 18 months, resulting in an 11-point drop in support across the EU.
- Poland saw the most significant drop, losing 18 percentage points, though it began from a very high starting point (86% in March 2022 to 68% in September 2023). Germany saw a 16-point decrease (72% to 56%), the Netherlands a 15-point decline (73% to 58%), and France a 13-point dip (78% to 65%).
- Belgium is the only country where support increased in the last quarter, reaching 70% in September 2023.
- Throughout the entire period, the Dutch and the Germans have remained the most sceptical about energy independence.

EU27: Economic and financial sanctions on Russia are supposed to support Ukraine in its war effort. Do you think these sanctions are ...

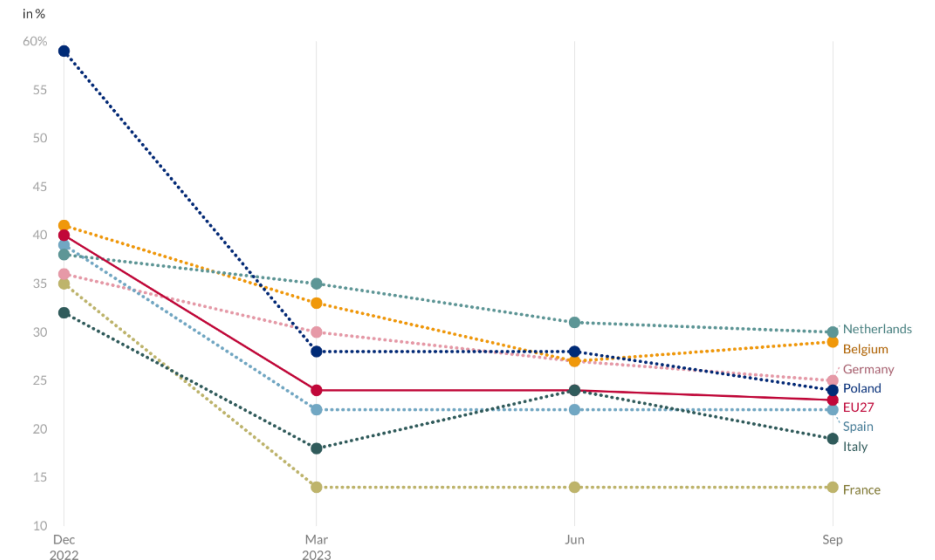


eupinions | what do you think?

Only 23% of Europeans believe sanctions on Russia are effective

This represents a significant shift from a more optimistic outlook recorded in December 2022 (see below). A clear majority of 55% in the EU now believe that economic and financial sanctions are ineffective.

EU27: Economic and financial sanctions on Russia are supposed to support Ukraine in its war effort. Do you think these sanctions are: Answer "Effective"



For single data points, please check the appendix. eupinions | what do you think?

Conclusions

The eupinions data presented here aims to explore how European solidarity with Ukraine has been influenced by the ongoing war and its associated risks and consequences.

In brief, we observe the following trends:

General support for Ukraine remains relatively stable, with some **challenges** evident in three areas: **weapons delivery, energy independence and acceptance of Ukrainian refugees**. While the observed shifts in opinions are not dramatic, they are noteworthy.

In terms of **EU enlargement**, Poland and Germany warrant special attention. Poland has witnessed a significant decline in support for Ukraine's EU membership, experiencing a 12-percentage-point drop over an 18-month period. Meanwhile, Germany, exhibits the lowest level of support for Ukraine's accession to the EU, standing at 52%.

In terms of support for **Ukrainian refugees**, Poland has also witnessed an 18-percentage-point drop.

Moreover, a considerable share of Europeans are either highly sceptical (55%) or uncertain (22%) about the **effectiveness of sanctions** against Russia.

This recent decline in support may be interpreted as an early indicator of weariness stemming from the prolonged duration of the war and the absence of evident progress in recent months.

As we enter the election season, it would be prudent for national governments and EU leadership to clearly communicate the importance of support for Ukraine while articulating their policy objectives and the concessions inherent in these policies. This is particularly crucial, considering the fact that political entrepreneurs throughout the EU may seek to exploit doubts and uncertainty for their own political gain.

About eupinions

eupinions is an independent platform for European public opinion. We collect and analyse data on European public opinion and comment on what Europeans think about current political issues and megatrends.

Every quarter, we collect samples from each EU member state in 22 languages.

Our data is representative with regard to age, gender, education and country/region.

eupinions is a Bertelsmann Stiftung project. The data is collected by Latana.

Visit www.eupinions.eu for further information!

Methodology note

The samples analysed in this report were drawn by Latana in March (with a size of n=13,208), June (n=13,220), September (n=13,204) and December 2022 (n=13,300) as well as in March (n=13,270), June (n=13,322) and September 2023 (n=13,287) across all 27 EU member states. Our samples take into account current population distributions with regard to age (16–70 years), gender and region/country. In order to obtain census representative results, the data were weighted using the most recent Eurostat statistics.

Any references to differences between countries in the report pertain only to the seven countries with sufficiently large sample sizes: Belgium, Germany, France, Italy, The Netherlands, Poland and Spain.

Given the sample size and design–effect considerations, the margin of error is 1% for March and September 2022, as well as June 2023, and 0.9% for June and December 2022, and March and September 2023, all at a confidence level of 95%.

Data Appendix

EU27: The European Union should play a more active role in world affairs.

	03/2022	06/2022	09/2022	12/2022	03/2023	06/2023	09/2023
EU27	82	80	79	80	79	78	79
Belgium	78	79	80	77	78	77	81
France	74	71	72	70	70	70	70
Germany	81	80	77	79	76	75	78
Italy	83	82	81	83	81	78	80
The Netherlands	73	73	72	70	74	75	70
Poland	86	84	83	84	84	84	81
Spain	90	88	87	87	89	87	87

(support in %)

EU27: For the European Union to play a more active role in world affairs, it needs ...

	03/2022	06/2022	09/2022	12/2022	03/2023	06/2023	09/2023
military power	70	71	69	70	69	69	70
strong allies	88	88	87	88	88	87	88
attractive values	89	89	88	89	89	88	89
economic strength	92	91	92	92	91	90	91

(support in %)

EU27: Should your country support Ukraine by delivering weapons?

	03/2022	06/2022	09/2022	12/2022	03/2023	06/2023	09/2023
EU27	56	54	50	54	55	54	53
Belgium	60	55	48	57	54	59	58
France	67	59	54	61	61	61	58
Germany	57	56	48	55	54	54	49
Italy	39	39	36	41	40	40	40
The Netherlands	67	64	57	60	67	66	64
Poland	75	77	76	75	75	74	71
Spain	66	61	57	59	65	65	61

(support in %)

EU27: Should the EU support Ukraine by delivering weapons?

	03/2022	06/2022	09/2022	12/2022	03/2023	06/2023	09/2023
EU27	62	60	55	61	62	62	60
Belgium	65	62	54	60	63	65	63
France	69	63	56	65	66	65	62
Germany	62	61	52	59	58	58	55
Italy	43	42	39	47	46	46	47
The Netherlands	71	68	63	67	72	72	69
Poland	84	84	80	86	87	84	82
Spain	70	65	61	64	69	70	65

(support in %)

EU27: Should the EU seek to become more energy-independent even if that means costs are rising further ?

	03/2022	06/2022	09/2022	12/2022	03/2023	06/2023	09/2023
EU27	74	72	67	67	65	65	63
Belgium	76	71	64	68	68	64	70
France	78	73	68	69	67	67	65
Germany	72	69	62	64	62	61	56
Italy	76	76	73	73	67	68	67
The Netherlands	73	66	63	59	61	61	58
Poland	86	80	80	75	72	71	68
Spain	74	73	69	67	67	68	68

(support in %)

EU27: Should the EU accept Ukraine as a member of the EU in the coming years?

	03/2022	06/2022	09/2022	12/2022	03/2023	06/2023	09/2023
EU27	69	66	63	65	65	64	63
Belgium	65	64	60	59	60	63	62
France	63	60	56	61	60	60	57
Germany	61	60	55	54	57	53	52
Italy	69	66	66	67	67	65	68
The Netherlands	65	61	61	61	65	66	61
Poland	87	84	82	81	81	79	75
Spain	82	80	78	80	83	80	79

(support in %)

EU27: Should your country accept refugees from Ukraine?

	03/2022	06/2022	09/2022	12/2022	03/2023	06/2023	09/2023
EU27	86	81	77	79	79	76	75
Belgium	84	79	73	72	73	76	76
France	84	76	72	76	78	73	72
Germany	86	83	74	73	73	71	70
Italy	88	84	80	84	83	80	81
The Netherlands	86	79	75	77	80	78	76
Poland	83	77	73	73	73	71	65
Spain	93	90	89	88	91	89	88

(support in %)

EU27: Should the EU accept new member states in the coming years?

	03/2022	06/2022	09/2022	12/2022	03/2023	06/2023	09/2023
EU27	73	71	68	68	69	68	67
Belgium	70	69	66	64	65	62	65
France	64	60	55	55	57	56	56
Germany	66	66	60	58	59	57	56
Italy	75	70	70	71	71	71	69
The Netherlands	71	68	63	62	67	69	63
Poland	86	83	83	81	83	80	79
Spain	85	84	84	82	85	84	82

(support in %)

EU27: The European Union needs a common defence policy.

	03/2022	06/2022	09/2022	12/2022	03/2023	06/2023	09/2023
EU27	90	88	88	88	88	87	87
Belgium	87	87	89	87	85	89	89
France	87	83	84	84	83	81	83
Germany	89	88	87	86	87	86	87
Italy	90	88	89	89	88	86	87
The Netherlands	85	84	83	84	86	85	85
Poland	91	91	89	93	91	91	88
Spain	92	93	92	93	92	92	92

(support in %)

EU27: Economic and financial sanctions on Russia are supposed to support Ukraine in its war effort. Do you think these sanctions are: Effective?

	12/2022	03/2023	06/2023	09/2023
EU27	40	24	24	23
Belgium	41	33	27	29
France	35	14	14	14
Germany	36	30	27	25
Italy	32	18	24	19
The Netherlands	38	35	31	30
Poland	59	28	28	24
Spain	39	22	22	22

(support in %)

Thank you!



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Imprint

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