

Barometer of European public opinion

March 2025

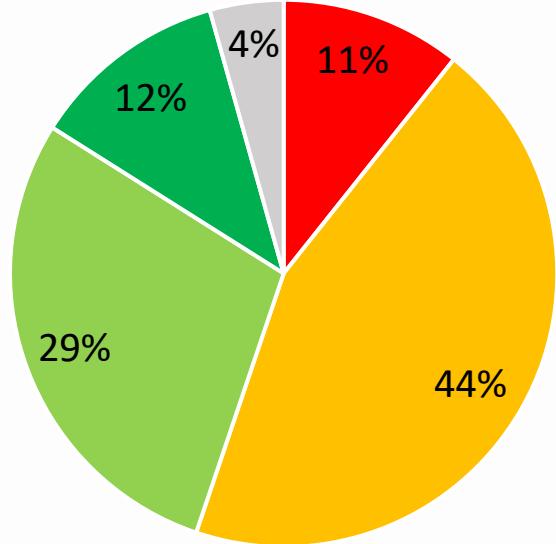
2nd wave

9 countries

Sample: 10,572 people

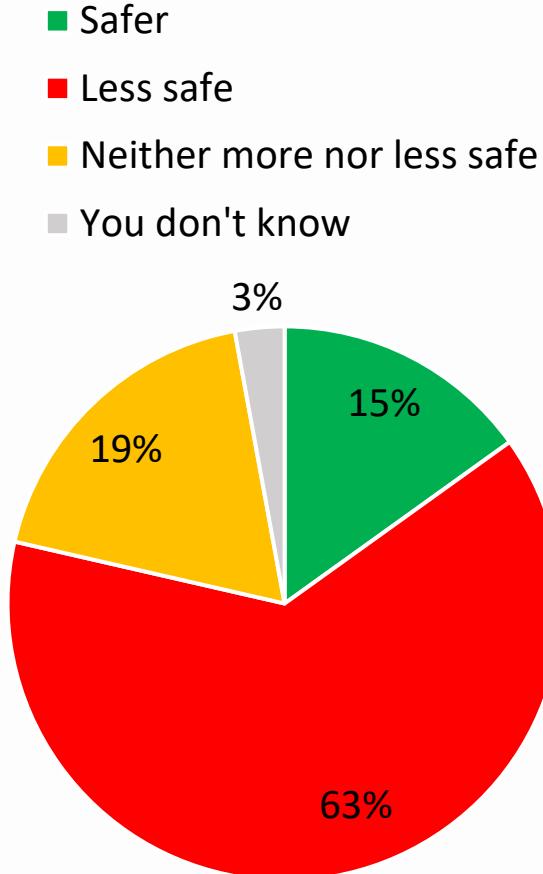
In your opinion, what is the level of risk of an armed conflict on the territory of the European Union in the coming years?

- Very high
- Fairly high
- Rather low
- Very low
- You don't know



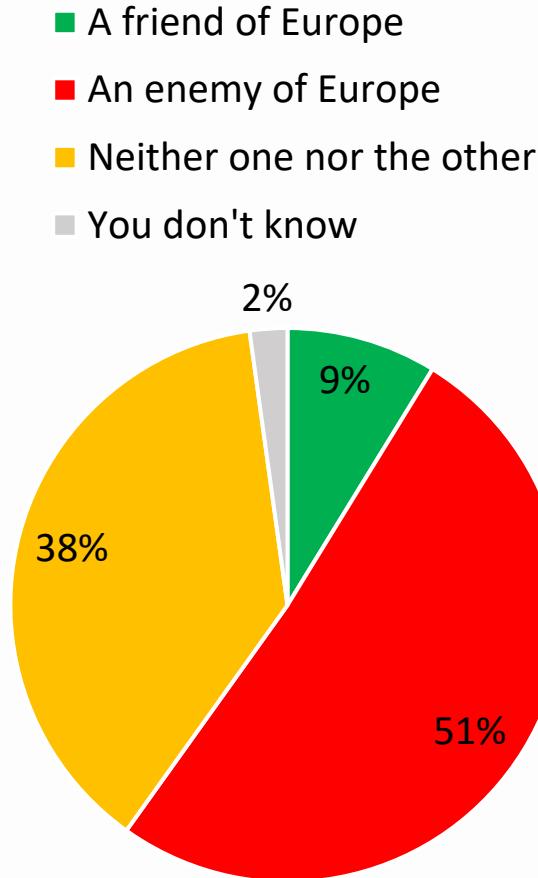
Country	Very high	Fairly high	Rather low	Very low	You don't know	High	Low
Romania	23%	51%	17%	5%	4%	74%	22%
Poland	16%	55%	20%	4%	5%	71%	24%
Netherlands	12%	55%	22%	4%	7%	67%	26%
Denmark	14%	48%	25%	7%	6%	62%	32%
Belgium	10%	43%	30%	13%	4%	53%	43%
Espagne	8%	45%	34%	11%	1%	53%	46%
Germany	9%	42%	29%	14%	6%	51%	43%
France	9%	41%	31%	13%	6%	50%	44%
Italy	10%	39%	32%	16%	3%	49%	48%
Total for the 9 countries	11%	44%	29%	12%	4%	55%	40%

Do you think Donald Trump's election makes the world:



Country	Safer	Less safe	Neither more nor less safe	You don't know
Romania	23%	44%	27%	6%
Poland	20%	46%	27%	7%
Italy	16%	59%	22%	2%
Germany	14%	71%	13%	2%
France	14%	65%	19%	2%
Espagne	13%	68%	18%	1%
Netherlands	11%	69%	14%	6%
Belgium	10%	78%	10%	2%
Denmark	10%	77%	10%	3%
Total for the 9 countries	15%	63%	18%	3%

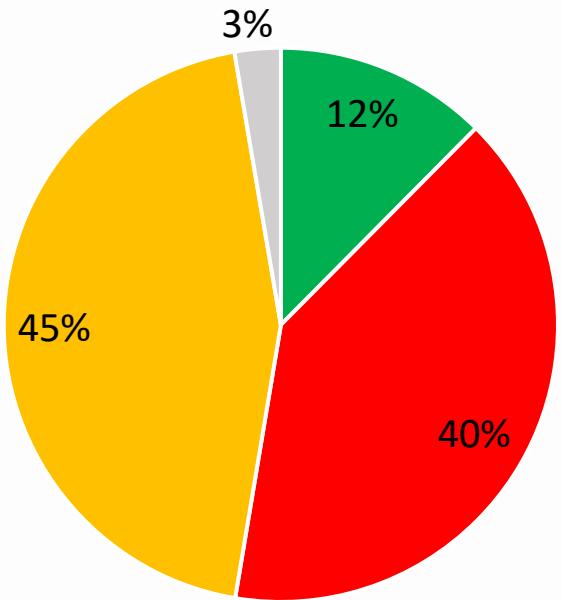
Do you consider Donald Trump a friend or an enemy of Europe?



Country	A friend of Europe	An enemy of Europe	Neither one nor the other	You don't know
Romania	23%	37%	35%	5%
Poland	19%	29%	46%	6%
Denmark	11%	66%	21%	2%
Italy	8%	52%	39%	1%
Netherlands	8%	60%	28%	4%
Germany	8%	54%	36%	2%
Espagne	7%	54%	38%	1%
France	6%	50%	43%	1%
Belgium	3%	63%	33%	1%
Total for the 9 countries	9%	51%	38%	2%

Do you consider Donald Trump a friend or an enemy of [Your country]?

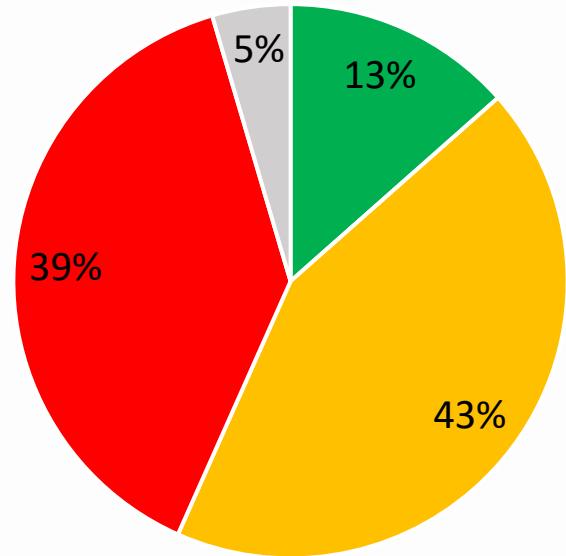
- A friend of [Your country]
- An enemy of [Your country]
- Neither one nor the other
- You don't know



Country	A friend of [Your country]	An enemy of [Your country]	Neither one nor the other	You don't know
Poland	29%	17%	46%	8%
Romania	27%	23%	45%	5%
Italy	16%	37%	46%	1%
Denmark	11%	61%	25%	3%
Netherlands	11%	50%	34%	5%
Germany	9%	46%	43%	2%
France	8%	40%	50%	2%
Espagne	5%	51%	43%	1%
Belgium	4%	53%	42%	1%
Total for the 9 countries	12%	40%	45%	3%

To what extent do you consider that these leaders respect democratic principles?

- Respects democratic principles
- Has an authoritarian tendency
- Behaves like a dictator
- You don't know

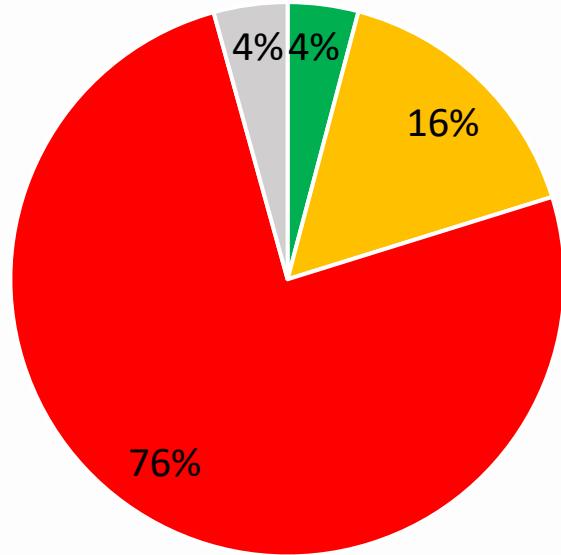


Donald Trump

Country	Respects democratic principles	Has an authoritarian tendency	Behaves like a dictator	You don't know
Romania	25%	45%	23%	7%
Poland	21%	38%	31%	10%
Italy	18%	43%	29%	10%
France	14%	50%	35%	2%
Germany	9%	38%	52%	1%
Netherlands	9%	35%	50%	6%
Espagne	9%	52%	36%	3%
Denmark	8%	27%	61%	4%
Belgium	7%	36%	56%	1%
Total for the 9 countries	13%	43%	39%	5%

To what extent do you consider that these leaders respect democratic principles?

- Respects democratic principles
- Has an authoritarian tendency
- Behaves like a dictator
- You don't know

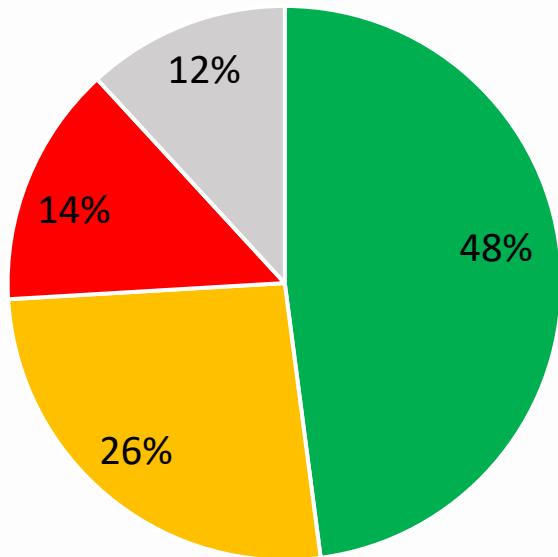


Vladimir Putin

Country	Respects democratic principles	Has an authoritarian tendency	Behaves like a dictator	You don't know
Italy	7%	29%	52%	12%
Romania	7%	18%	68%	7%
Netherlands	5%	10%	80%	5%
Denmark	4%	10%	82%	4%
Germany	3%	12%	83%	2%
Espagne	3%	17%	79%	1%
Poland	3%	7%	83%	7%
France	3%	17%	80%	1%
Belgium	2%	12%	85%	1%
Total for the 9 countries	4%	16%	76%	4%

To what extent do you consider that these leaders respect democratic principles?

- Respects democratic principles
- Has an authoritarian tendency
- Behaves like a dictator
- You don't know

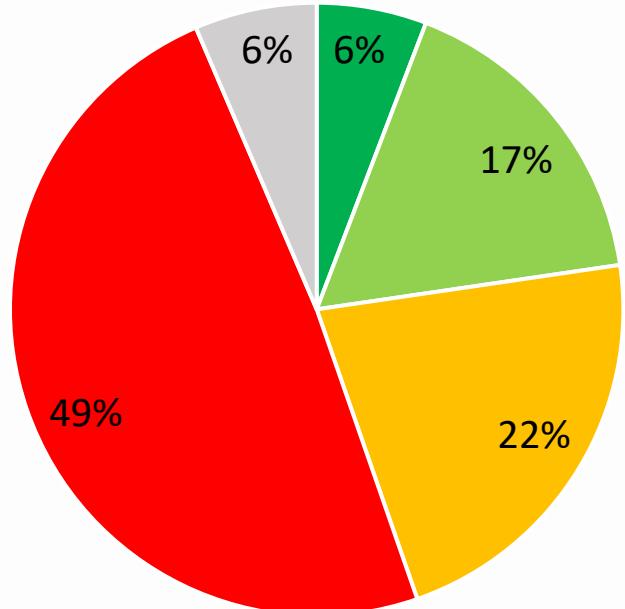


Volodymyr Zelensky

Country	Respects democratic principles	Has an authoritarian tendency	Behaves like a dictator	You don't know
Denmark	62%	18%	8%	12%
Germany	56%	21%	15%	8%
Belgium	54%	25%	11%	10%
France	53%	23%	12%	12%
Netherlands	52%	22%	11%	15%
Espagne	51%	26%	14%	9%
Poland	40%	26%	14%	20%
Romania	36%	30%	17%	17%
Italy	32%	36%	20%	12%
Total for the 9 countries	48%	26%	14%	12%

Do you have a positive or negative opinion of Elon Musk?

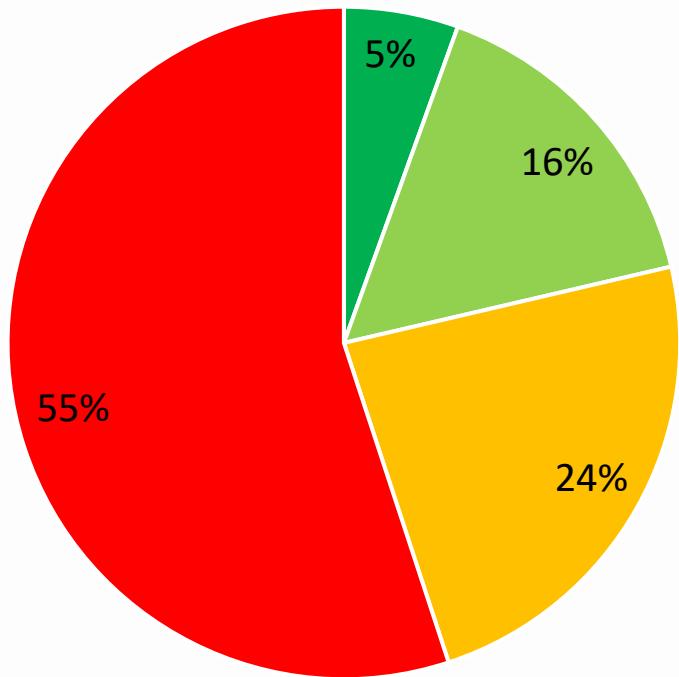
- Very positive ■ Rather positive
- Rather negative ■ Very negative
- You don't know



Country	Very positive	Rather positive	Rather negative	Very negative	You don't know	Positive	Negative
Romania	14%	24%	24%	24%	14%	38%	48%
Poland	10%	25%	21%	30%	14%	35%	51%
Italy	5%	19%	28%	42%	6%	24%	70%
Espagne	5%	16%	25%	48%	6%	21%	73%
France	4%	16%	19%	56%	5%	20%	75%
Germany	5%	14%	19%	58%	4%	19%	77%
Denmark	8%	10%	21%	54%	7%	18%	75%
Netherlands	5%	11%	21%	53%	10%	16%	74%
Belgium	3%	9%	16%	69%	3%	12%	85%
Total for the 9 countries	6%	17%	22%	49%	6%	23%	71%

Do you completely agree, somewhat agree, somewhat disagree, or completely disagree with the following statements?

- Yes, absolutely ■ Yes, rather
- No, rather not ■ Not at all

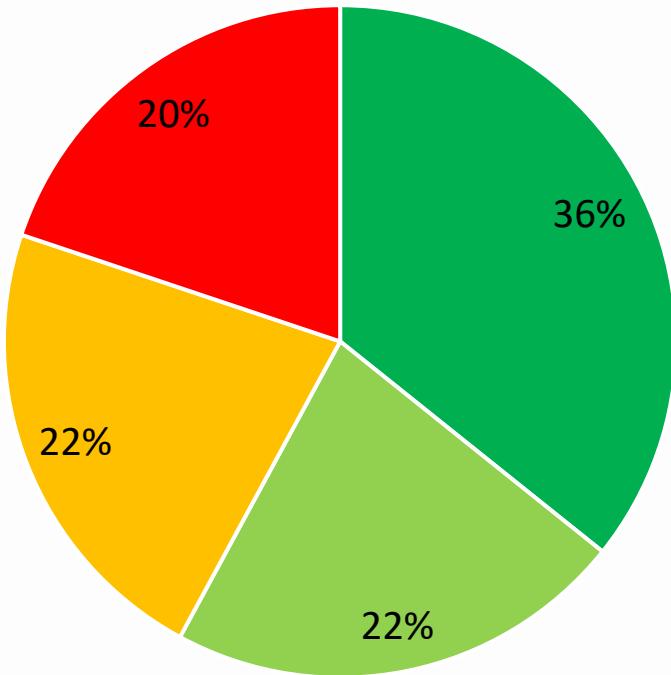


Elon Musk can be trusted

Country	Yes, absolutely	Yes, rather	No, rather not	Not at all	Yes	No
Romania	11%	27%	34%	28%	38%	62%
Poland	10%	26%	32%	32%	36%	64%
Netherlands	7%	14%	31%	48%	21%	79%
Denmark	7%	14%	20%	59%	21%	79%
Italy	4%	16%	21%	59%	20%	80%
France	3%	15%	22%	59%	19%	81%
Germany	5%	13%	20%	62%	18%	82%
Espagne	6%	11%	23%	60%	17%	83%
Belgium	4%	10%	22%	64%	14%	86%
Total for the 9 countries	5%	16%	24%	55%	21%	79%

Do you completely agree, somewhat agree, somewhat disagree, or completely disagree with the following statements?

- Yes, absolutely ■ Yes, rather
- No, rather not ■ Not at all



Tesla should be boycotted

Country	Yes, absolutely	Yes, rather	No, rather not	Not at all	Oui	Non
Belgium	49%	23%	15%	13%	72%	28%
Denmark	42%	28%	18%	12%	70%	30%
France	44%	22%	16%	18%	66%	34%
Netherlands	38%	27%	25%	10%	65%	35%
Germany	38%	22%	20%	20%	60%	40%
Poland	30%	27%	28%	15%	57%	43%
Espagne	34%	20%	26%	20%	54%	46%
Italy	31%	20%	24%	25%	51%	49%
Romania	20%	23%	32%	25%	43%	57%
Total for the 9 countries	36%	22%	22%	20%	58%	42%

Which of the following two statements do you most agree with?

70%



10%

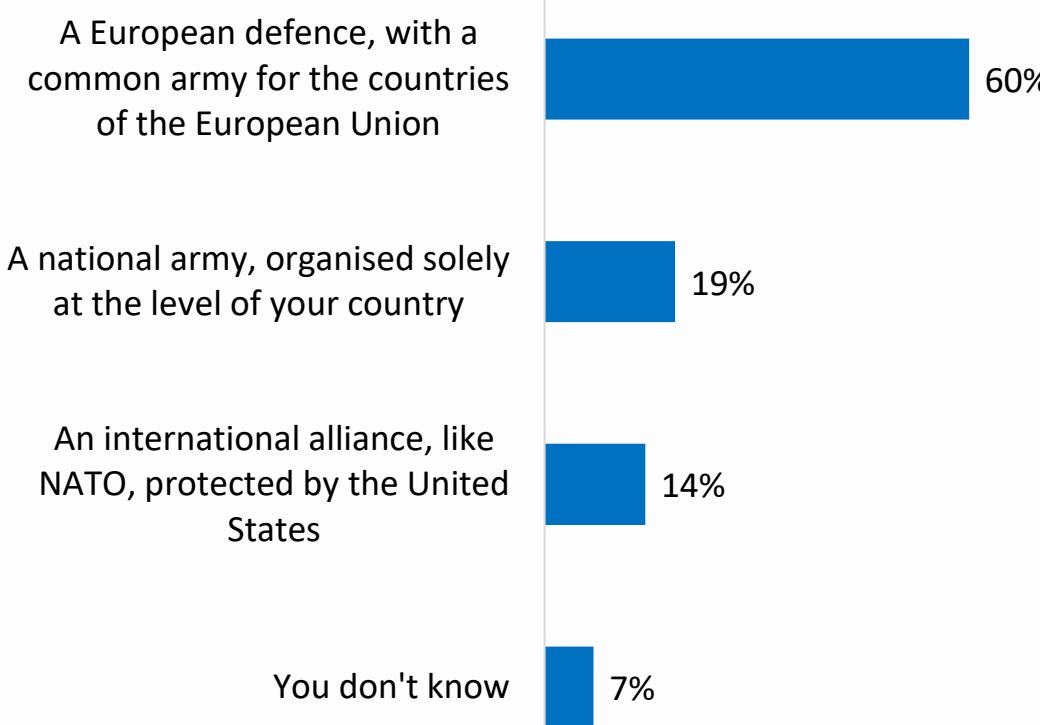


The European Union should
rely only on its own
strength to ensure its
security and defense

The European Union can
rely on Donald Trump's
United States to ensure its
security and defense

Country	The European Union should rely only on its own strength to ensure its security and defense	The European Union can rely on Donald Trump's United States to ensure its security and defense	Neither one nor the other	You don't know
Belgium	80%	5%	13%	2%
Denmark	78%	11%	7%	4%
France	77%	4%	17%	2%
Germany	76%	5%	18%	1%
Netherlands	72%	11%	10%	7%
Espagne	71%	9%	18%	2%
Poland	59%	23%	13%	5%
Italy	58%	12%	27%	3%
Romania	57%	27%	11%	5%
Total for the 9 countries	70%	10%	17%	3%

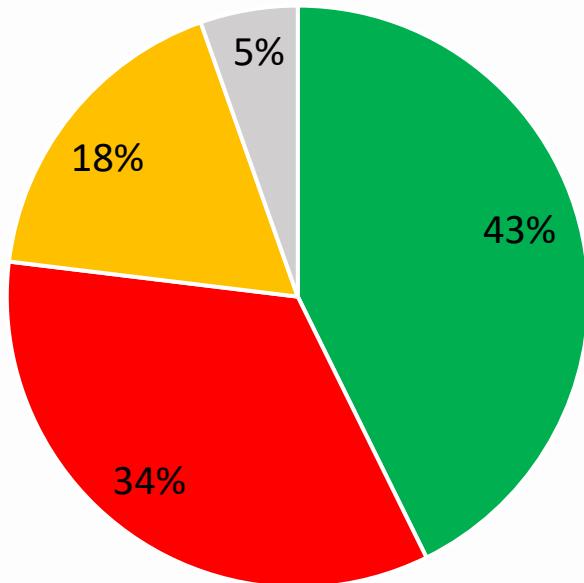
In terms of defense, which of the following solutions do you think is the best to ensure your country's security?



Country	A European defence, with a common army for the countries of the European Union	A national army, organised solely at the level of your country	An international alliance, like NATO, protected by the United States	You don't know
Belgium	74%	8%	13%	5%
Espagne	73%	10%	12%	5%
Germany	69%	13%	12%	6%
Italy	65%	15%	14%	6%
Netherlands	54%	19%	15%	12%
Denmark	53%	16%	21%	10%
France	53%	33%	7%	7%
Romania	46%	17%	28%	9%
Poland	37%	24%	29%	10%
Total for the 9 countries	60%	19%	14%	7%

European Union member states spend an average of 1.9% of their GDP on defense.
Which of the following two statements do you most agree with?

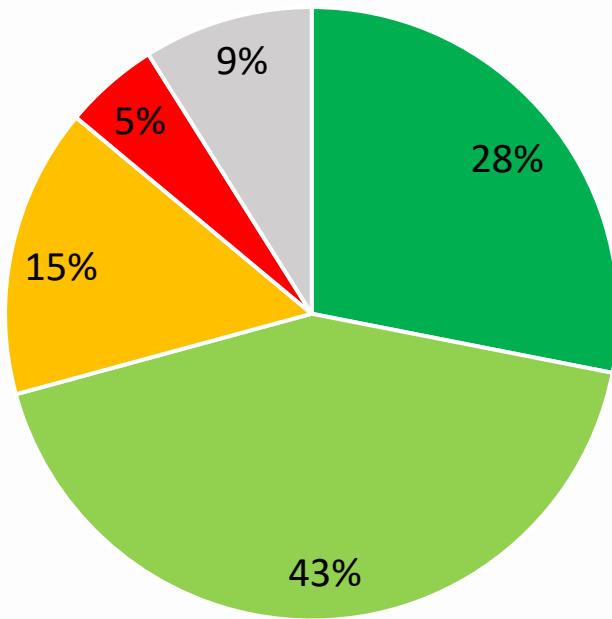
- It is urgent to increase the European Union's defense spending to 5% of GDP to protect against external military threats.
- There are other expenses more urgent than defense
- Neither one nor the other
- You don't know



Country	It is urgent to increase the European Union's defense spending to 5% of GDP to protect against external military threats	There are other expenses more urgent than defense	Neither one nor the other	You don't know
Poland	62%	17%	12%	9%
Netherlands	50%	26%	10%	14%
Belgium	50%	32%	14%	4%
France	48%	31%	16%	5%
Denmark	47%	32%	9%	12%
Romania	45%	34%	12%	9%
Germany	43%	27%	25%	5%
Espagne	43%	35%	20%	2%
Italy	19%	62%	16%	3%
Total for the 9 countries	43%	34%	18%	5%

European Union member states purchase more than half of their weapons imports from the United States. Should they be required to buy exclusively from within the European Union to strengthen European military sovereignty?

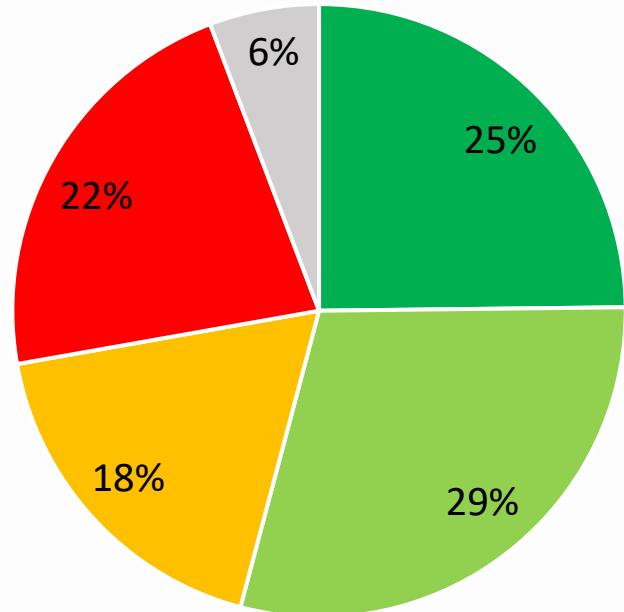
- Yes, absolutely ■ Yes, rather
- No, rather not ■ Not at all
- You don't know



Country	Yes, absolutely	Yes, rather	No, rather not	Not at all	You don't know	Yes	No
France	45%	41%	6%	2%	5%	86%	8%
Belgium	35%	47%	12%	2%	4%	82%	14%
Espagne	30%	46%	17%	5%	2%	76%	22%
Germany	23%	47%	18%	5%	7%	70%	23%
Italy	25%	44%	14%	7%	10%	69%	21%
Denmark	25%	39%	15%	4%	17%	64%	19%
Netherlands	17%	44%	18%	5%	16%	61%	23%
Romania	26%	30%	21%	7%	16%	56%	28%
Poland	16%	36%	24%	7%	17%	52%	31%
Total for the 9 countries	28%	43%	15%	5%	9%	71%	20%

Knowing that Donald Trump is beginning to suspend U.S. military aid to Ukraine, would you be favorable or unfavorable to the European Union increasing its military engagement to support Ukraine against Russia?

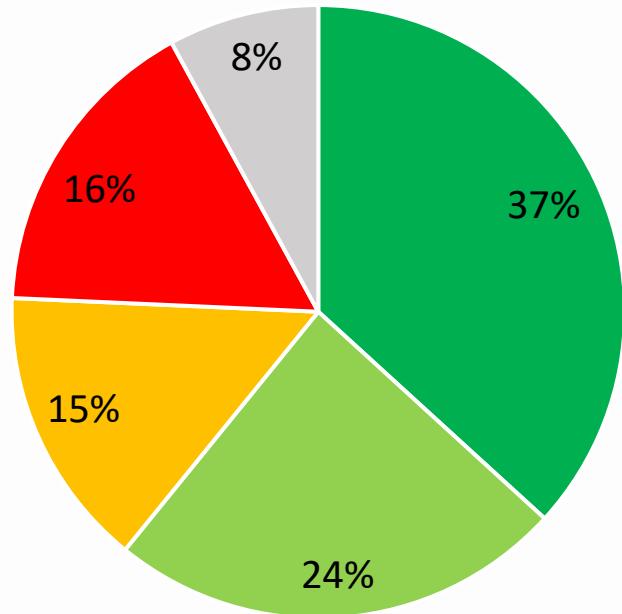
- Yes, absolutely ■ Yes, rather
- No, rather not ■ Not at all
- You don't know



Country	Yes, absolutely	Yes, rather	No, rather not	Not at all	You don't know	Yes	No
Denmark	32%	33%	15%	9%	11%	65%	24%
Germany	37%	27%	13%	20%	3%	64%	33%
Netherlands	23%	39%	14%	9%	15%	62%	23%
Belgium	27%	33%	15%	20%	5%	60%	35%
Poland	26%	33%	20%	11%	10%	59%	31%
Espagne	24%	35%	16%	20%	5%	59%	36%
Romania	24%	25%	23%	16%	12%	49%	39%
France	20%	29%	18%	28%	5%	49%	46%
Italy	13%	24%	26%	33%	4%	37%	59%
Total for the 9 countries	25%	29%	18%	22%	6%	54%	40%

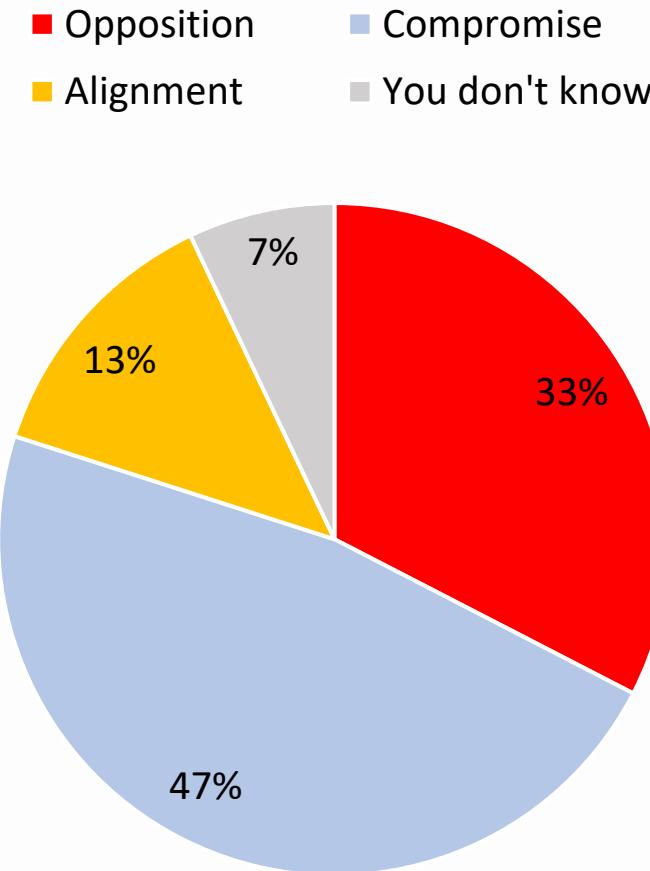
235 billion in Russian assets held in European financial institutions and banks are currently frozen. Would you be favorable to the European Union seizing these Russian assets and using them to finance support for Ukraine?

- Yes, absolutely ■ Yes, rather
- No, rather not ■ Not at all
- You don't know



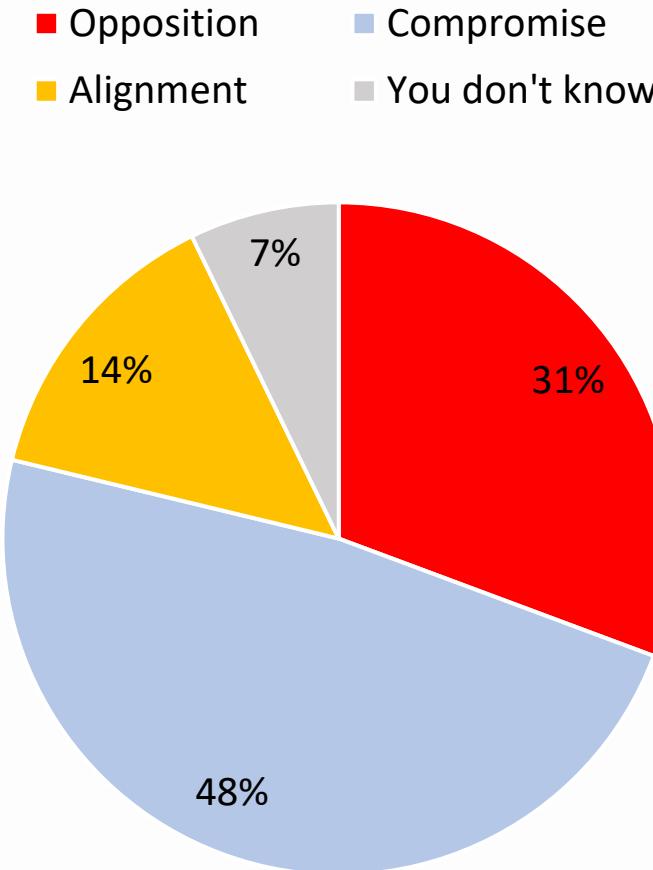
Country	Yes, absolutely	Yes, rather	No, rather not	Not at all	You don't know	Yes	No
Denmark	41%	28%	12%	6%	13%	69%	18%
Espagne	40%	28%	12%	15%	5%	68%	27%
Germany	44%	23%	12%	17%	4%	67%	29%
Poland	38%	28%	13%	9%	13%	66%	21%
Belgium	38%	26%	16%	14%	6%	64%	30%
Netherlands	34%	29%	14%	9%	14%	63%	23%
France	34%	23%	18%	18%	7%	57%	36%
Romania	30%	24%	17%	15%	14%	54%	32%
Italy	30%	20%	20%	24%	6%	50%	44%
Total for the 9 countries	37%	24%	15%	16%	8%	61%	31%

Since Donald Trump's election, what should the European Union's attitude be toward the new U.S. government, in your opinion?



Country	Opposition	Compromise	Alignment	You don't know
France	42%	48%	5%	5%
Espagne	40%	32%	20%	8%
Belgium	39%	46%	10%	5%
Germany	34%	53%	9%	4%
Denmark	27%	35%	23%	15%
Netherlands	27%	37%	16%	20%
Italy	26%	60%	11%	3%
Romania	25%	34%	24%	17%
Poland	18%	47%	23%	12%
Total for the 9 countries	33%	47%	13%	7%

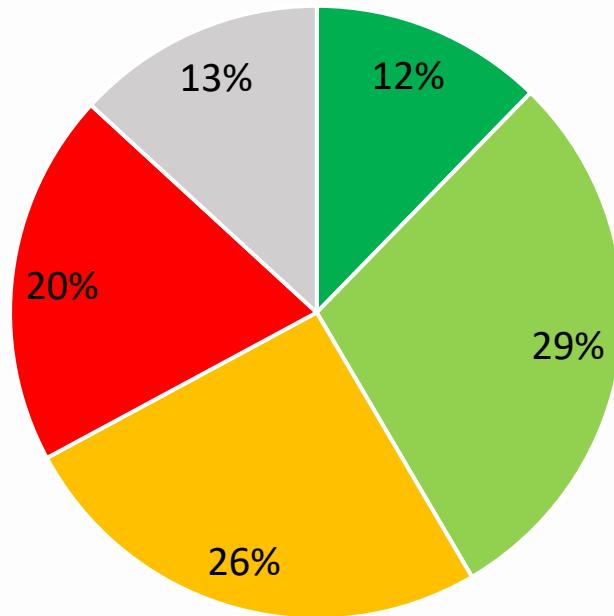
Since Donald Trump's election, what should [Your country]'s attitude be toward the new U.S. government, in your opinion?



Country	Opposition	Compromise	Alignment	You don't know
France	40%	49%	6%	5%
Espagne	38%	35%	18%	9%
Belgium	37%	47%	10%	6%
Germany	32%	54%	10%	4%
Denmark	27%	34%	26%	13%
Netherlands	27%	38%	16%	19%
Italy	25%	58%	14%	3%
Romania	21%	34%	30%	15%
Poland	15%	48%	24%	13%
Total for the 9 countries	31%	48%	14%	7%

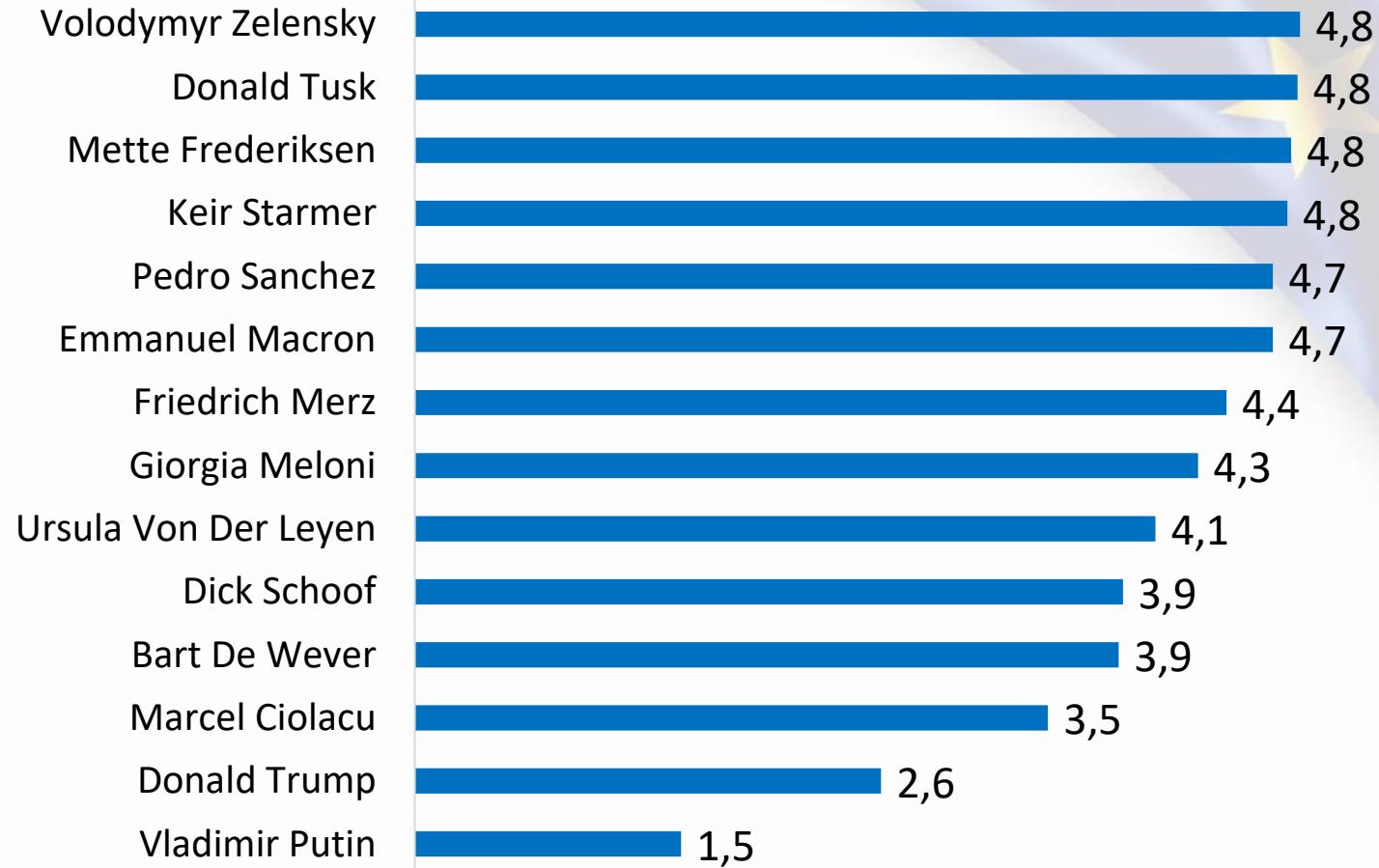
Since Donald Trump's election, do you think the [head of state/head of government] of your country has had the right attitude toward the new U.S. government?

- Yes, absolutely ■ Yes, rather
- No, rather not ■ Not at all
- You don't know



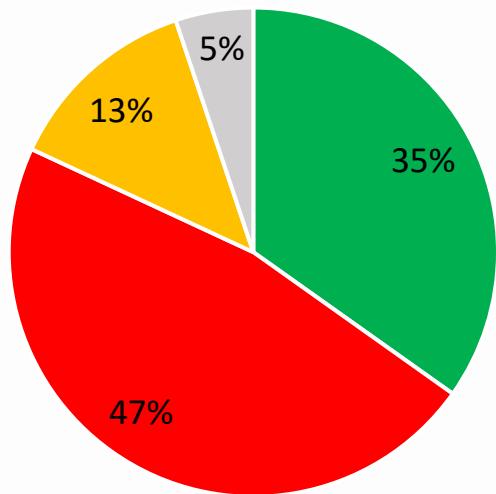
Country	Yes, absolutely	Yes, rather	No, rather not	Not at all	You don't know	Yes	No
Belgium	14%	44%	15%	10%	17%	58%	25%
Denmark	21%	32%	22%	8%	17%	53%	30%
France	15%	30%	23%	23%	9%	45%	46%
Espagne	14%	29%	25%	25%	7%	43%	50%
Italy	15%	27%	27%	25%	6%	42%	52%
Poland	13%	29%	25%	15%	18%	42%	40%
Germany	8%	31%	28%	17%	16%	39%	45%
Netherlands	8%	26%	27%	10%	29%	34%	37%
Romania	10%	23%	29%	13%	25%	33%	42%
Total for the 9 countries	12%	29%	26%	20%	13%	41%	46%

On a scale from 0 to 10, how much trust do you have in the following political leaders?
(0 = no trust at all, 10 = very high trust)



Which of the following two statements do you most agree with?

- Ukraine should be militarily supported until it regains control of its territories occupied by Russia.
- Ukraine should agree to sign a peace treaty even if it means ceding the part of its territory occupied by Russia
- Neither one nor the other
- You don't know

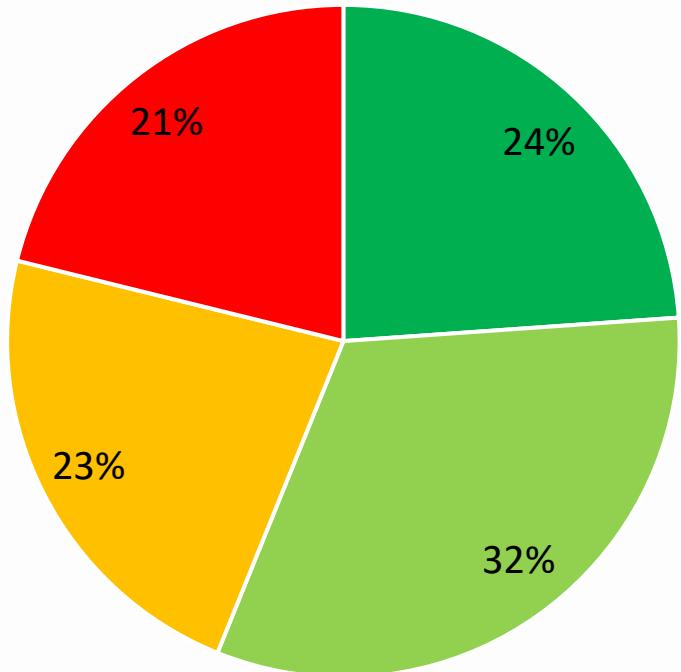


Country	Ukraine should be militarily supported until it regains control of its territories occupied by Russia	Ukraine should agree to sign a peace treaty even if it means ceding the part of its territory occupied by Russia	Neither one nor the other	You don't know
Denmark	48%	33%	9%	10%
Belgium	44%	42%	11%	3%
Netherlands	42%	38%	9%	11%
Espagne	40%	39%	18%	3%
Poland	39%	41%	12%	8%
Germany	37%	47%	12%	4%
France	35%	47%	12%	6%
Romania	29%	51%	12%	8%
Italy	18%	62%	17%	3%
Total for the 9 countries	35%	47%	13%	5%

Do you completely agree, somewhat agree, somewhat disagree, or completely disagree with the following statements?

Ukraine should become a member of the European Union by 2030

- Yes, absolutely ■ Yes, rather
- No, rather not ■ Not at all

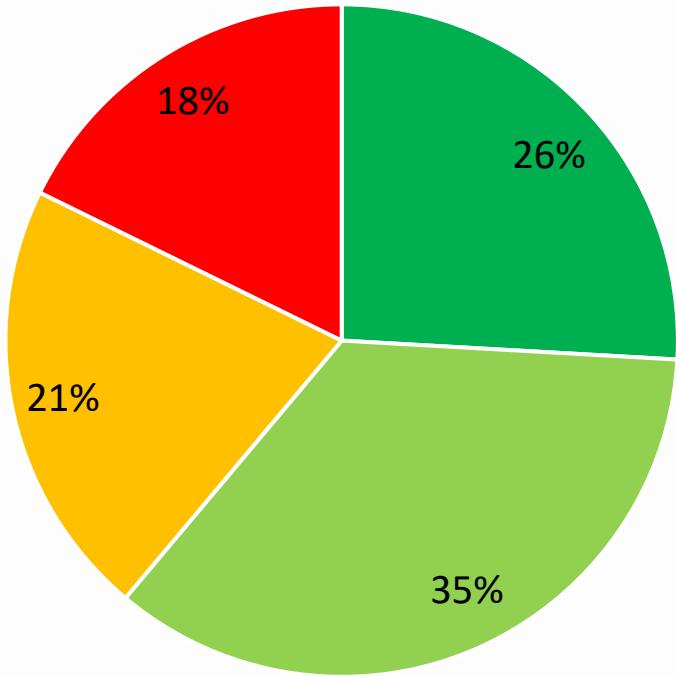


Country	Yes, absolutely	Yes, rather	No, rather not	Not at all	Yes	No
Denmark	35%	34%	19%	12%	69%	31%
Espagne	25%	42%	17%	16%	67%	33%
Belgium	26%	33%	20%	21%	59%	41%
Netherlands	23%	36%	25%	16%	59%	41%
Romania	24%	32%	24%	20%	56%	44%
Poland	21%	32%	25%	22%	53%	47%
Italy	18%	32%	20%	30%	50%	50%
Germany	20%	30%	22%	28%	50%	50%
France	18%	27%	25%	30%	45%	55%
Total for the 9 countries	24%	32%	23%	21%	56%	44%

Do you completely agree, somewhat agree, somewhat disagree, or completely disagree with the following statements?

The French nuclear deterrent should be extended to all members of the European Union

- Yes, absolutely ■ Yes, rather
- No, rather not ■ Not at all

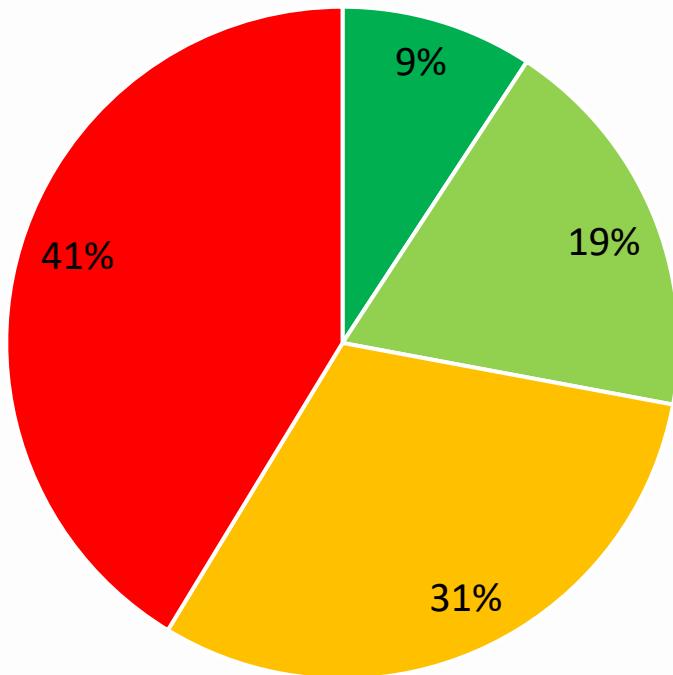


Country	Yes, absolutely	Yes, rather	No, rather not	Not at all	Yes	No
Belgium	36%	40%	13%	11%	76%	24%
Poland	33%	41%	19%	7%	74%	26%
Germany	34%	35%	18%	13%	69%	31%
Espagne	30%	35%	21%	14%	65%	35%
Denmark	23%	42%	24%	11%	65%	35%
Netherlands	24%	39%	26%	11%	63%	37%
Romania	28%	35%	24%	14%	63%	37%
France	17%	35%	22%	26%	52%	48%
Italy	15%	32%	24%	29%	47%	53%
Total for the 9 countries	26%	35%	21%	18%	61%	39%

Do you completely agree, somewhat agree, somewhat disagree, or completely disagree with the following statements?

Donald Trump's actions have had and will have positive effects on my country

- Yes, absolutely ■ Yes, rather
- No, rather not ■ Not at all

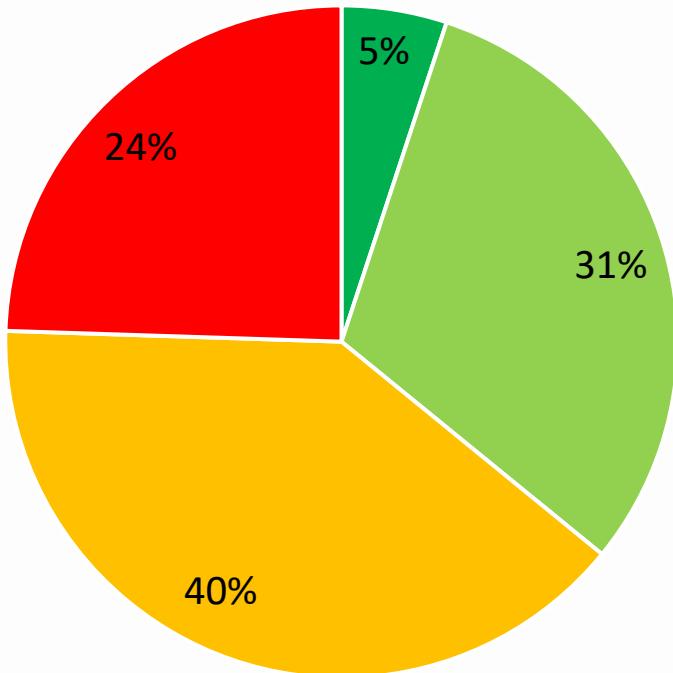


Country	Yes, absolutely	Yes, rather	No, rather not	Not at all	Yes	No
Poland	18%	36%	30%	16%	54%	46%
Romania	19%	34%	31%	16%	53%	47%
Netherlands	12%	21%	34%	33%	33%	67%
Italy	6%	19%	23%	52%	25%	75%
France	6%	19%	32%	43%	25%	75%
Denmark	8%	14%	23%	55%	22%	78%
Germany	9%	12%	30%	49%	21%	79%
Espagne	8%	10%	37%	45%	18%	82%
Belgium	5%	12%	36%	47%	17%	83%
Total for the 9 countries	9%	19%	31%	41%	28%	72%

Do you completely agree, somewhat agree, somewhat disagree, or completely disagree with the following statements?

European leaders are up to the challenges posed by the international situation

- Yes, absolutely ■ Yes, rather
- No, rather not ■ Not at all

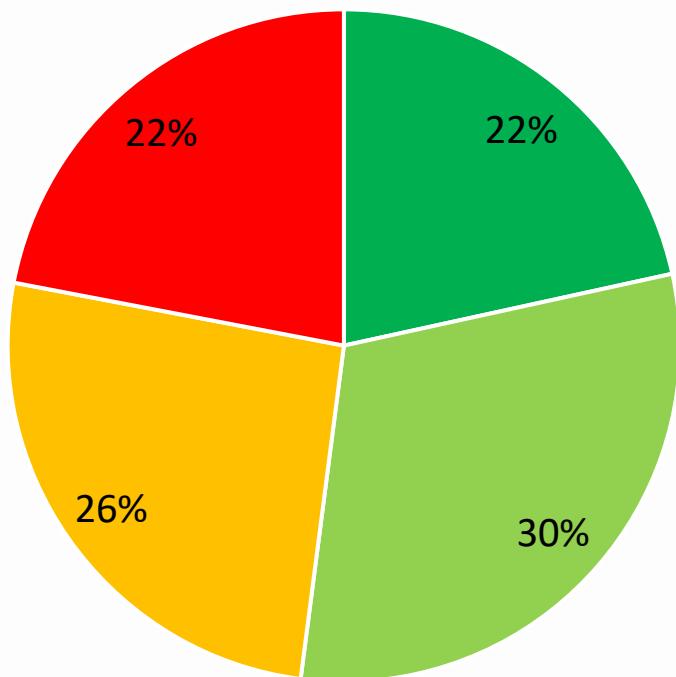


Country	Yes, absolutely	Yes, rather	No, rather not	Not at all	Yes	No
Denmark	18%	56%	20%	6%	74%	26%
Poland	20%	42%	26%	12%	62%	38%
Netherlands	8%	42%	37%	13%	50%	50%
Romania	13%	36%	33%	18%	49%	51%
Germany	2%	38%	42%	18%	40%	60%
Belgium	2%	34%	45%	19%	36%	64%
France	2%	27%	41%	30%	29%	71%
Espagne	4%	22%	45%	29%	26%	74%
Italy	1%	18%	43%	38%	19%	81%
Total for the 9 countries	5%	31%	40%	24%	36%	64%

Do you completely agree, somewhat agree, somewhat disagree, or completely disagree with the following statements?

Establishing a mandatory 12-month military service to ensure Europe's defense

- Yes, absolutely ■ Yes, rather
- No, rather not ■ Not at all

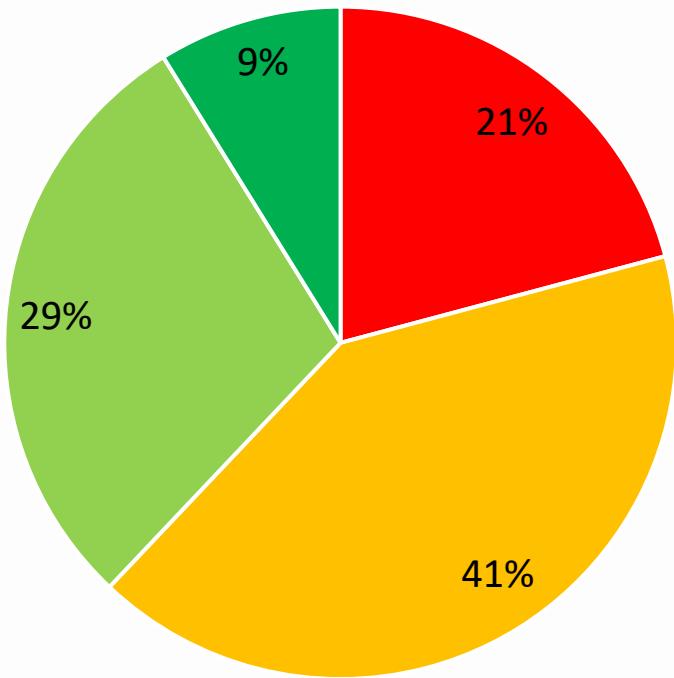


Country	Yes, absolutely	Yes, rather	No, rather not	Not at all	Yes	No
Germany	35%	33%	20%	12%	68%	32%
Denmark	25%	38%	24%	13%	63%	37%
Belgium	25%	33%	25%	17%	58%	42%
Netherlands	21%	36%	27%	16%	57%	43%
Poland	25%	32%	27%	16%	57%	43%
Romania	24%	32%	24%	20%	56%	44%
France	15%	32%	31%	22%	47%	53%
Espagne	14%	27%	28%	31%	41%	59%
Italy	13%	24%	27%	36%	37%	63%
Total for the 9 countries	22%	30%	26%	22%	52%	48%

Do you completely agree, somewhat agree, somewhat disagree, or completely disagree with the following statements?

Large American technology companies are a threat to European sovereignty

- Yes, absolutely ■ Yes, rather
- No, rather not ■ Not at all



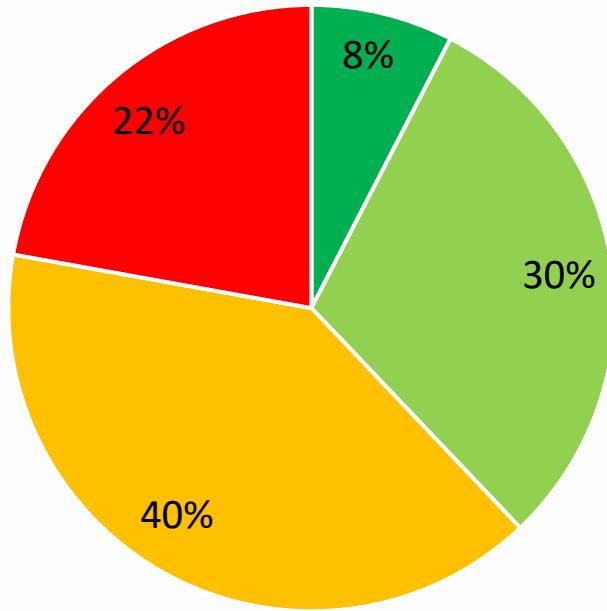
Country	Yes, absolutely	Yes, rather	No, rather not	Not at all	Yes	No
France	28%	47%	22%	3%	75%	25%
Belgium	24%	48%	24%	4%	72%	28%
Denmark	21%	47%	24%	8%	68%	32%
Espagne	26%	40%	25%	9%	66%	34%
Netherlands	19%	46%	27%	8%	65%	35%
Germany	21%	41%	29%	9%	62%	38%
Poland	15%	42%	30%	13%	57%	43%
Italy	14%	36%	38%	12%	50%	50%
Romania	11%	35%	39%	15%	46%	54%
Total for the 9 countries	21%	41%	29%	9%	62%	38%

Do you completely agree, somewhat agree, somewhat disagree, or completely disagree with the following statements?

To confront Russia and the United States, the European Union should move closer to China

■ Yes, absolutely ■ Yes, rather

■ No, rather not ■ Not at all



Country	Yes, absolutely	Yes, rather	No, rather not	Not at all	Yes	No
Romania	14%	36%	32%	18%	50%	50%
Poland	12%	38%	34%	16%	50%	50%
Espagne	10%	38%	31%	21%	48%	52%
Denmark	10%	29%	39%	22%	39%	61%
Germany	6%	32%	43%	19%	38%	62%
Netherlands	9%	29%	43%	19%	38%	62%
Italy	7%	29%	37%	27%	36%	64%
Belgium	6%	27%	46%	21%	33%	67%
France	4%	19%	49%	28%	23%	77%
Total for the 9 countries	8%	30%	40%	22%	38%	62%

Cluster 17 METHODOLOGY



Study conducted online using the CAWI method with a sample of 10,572 people across nine EU countries: France (1,319), Italy (1,257), Spain (1,539), Germany (1,407), Belgium (1,000), the Netherlands (1,020), Poland (1,003), Romania (1,014), and Denmark (1,013).



The samples are representative of the populations surveyed and are drawn up according to the quota method, based on age, gender, socio-professional category, size of municipality and region of residence.



Online self-administered questionnaires. Interviews conducted between 11 and 14 March.



Cluster17's identity is **scientific rigour**. Founded by academics and opinion specialists, we are committed to **producing quality data**. Cluster17 is the result of several years' research and development work, which has led to the creation of a **high-performance survey tool** and an innovative analysis method tested on tens of thousands of people throughout France. This approach is based on an unprecedented segmentation of **European societies into homogenous groups : the Clusters**.



On the strength of this work, Cluster17 has been on the podium of the best pollsters at every election since its creation in 2022.



[Click here to see our performances](#)





Cluster17



contact@cluster17.com
jean-yves.dormagen@cluster17.com