

Europeans' views on the international situation and the upcoming European elections

April 2024



# **RESEARCH METHODOLOGY**



#### **Research Methodology**



This survey has been **conducted online** through CAWI method (Computer Assisted Web Interview) on a sample representative of the European Union 18+ population.



The total sample size is 5.012 complete interviews, distributed proportionally to the population of the 27 EU countries with a slight correction which allows to analyze the data on the pan-European level and 5 different areas: Germany, France, Eastern Europe, Northern Europe, Southern Europe. For each country proportional quotas were set for age and gender. Quotas were calculated regarding the most recent parameters provided by Eurostat.



Interviews were collected between the 28<sup>th</sup> of March and the 8<sup>th</sup> of April 2024.



The report shows breakdowns by European political groups parties' voters and the following geographical areas:





l) Germany





 Eastern Countries (Baltic states, Poland, Czech R., Slovakia, Hungary, Romania, Bulgaria, Croatia, Slovenia)



4) Northern Countries (Sweden, Denmark, Finland, Belgium, Netherlands, Lux., Ireland, Austria)



5) Southern Countries (Spain, Italy, Portugal, Greece, Malta, Cyprus)



+ separate data for Italy and Spain

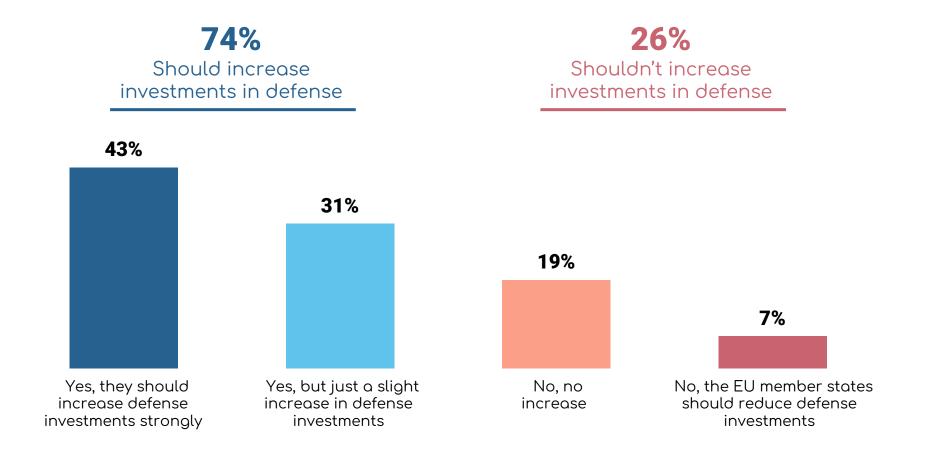
For European political groups parties' voters, in each country, people were interviewed on voting intentions on a national party basis and the results were recoded European political groups



# INTERNATIONAL SITUATION



#### The increase of the defense budget by EU member states





#### The increase of the defense budget by EU member states

All respondents: 5012

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	TOTAL	Germany	France	Southern Europe*	Italy	Spain	CEE	Northern Europe
Base	5012	949	724	1466	677	536	1144	729
Total – Should increase	74%	74%	67%	69%	61%	75%	83%	80%
Yes, they should increase defense investments strongly	43%	47%	35%	34%	31%	35%	54%	47%
Yes, but just a slight increase in defense investments	31%	27%	32%	35%	30%	40%	30%	32%
Total – Shouldn't increase	26%	26%	31%	31%	39%	25%	17%	20%
No, no increase	19%	18%	24%	22%	27%	19%	12%	17%
No, the EU member states should reduce defense investments	7%	8%	7%	9%	12%	6%	5%	4%

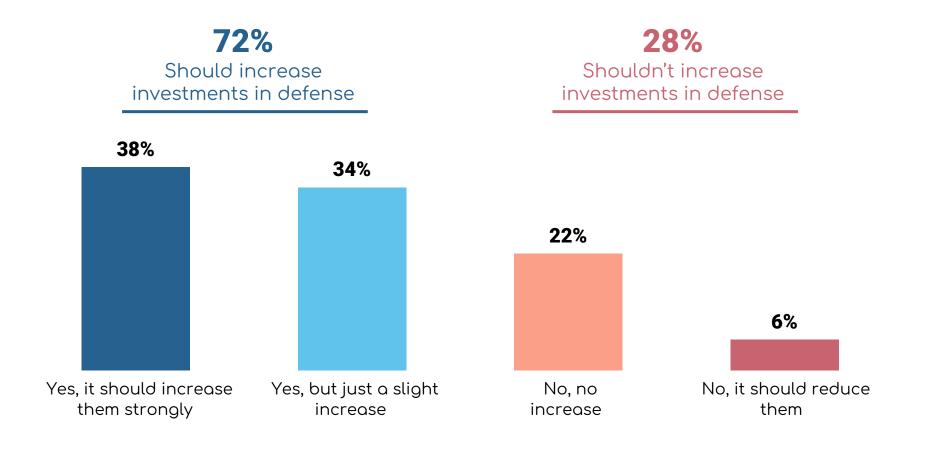


## The increase of the defense budget by EU member states

		ерр	S&D	renew europe.	DEN'IFY AND DEMOCRACY	ECR GROUP	THE ORIENS/EFA	THE	
	TOTAL	EPP	S&D	RE	ID	ECR	Greens	GUE/NGL	Not affiliated
Base	5012	729	692	331	455	342	187	178	566
Total – Should increase	74%	89%	82%	82%	69%	83%	76%	66%	62%
Yes, they should increase defense investments strongly	43%	57%	45%	51%	44%	53%	38%	31%	36%
Yes, but just a slight increase in defense investments	31%	32%	36%	31%	25%	30%	38%	35%	26%
Total – Shouldn't increase	26%	11%	18%	18%	31%	17%	24%	34%	38%
No, no increase	19%	8%	14%	16%	24%	14%	19%	19%	24%
No, the EU member states should reduce defense investments	7%	3%	3%	2%	7%	3%	5%	15%	14%



# The increase of the defense budget of its own country in case of a reduction of US support





# The increase of the defense budget of its own country in case of a reduction of US support

All respondents: 5012

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	TOTAL	Germany	France	Southern Europe*	Italy	Spain	CEE	Northern Europe
Base	5012	949	724	1466	677	536	1144	729
Total - Yes	<b>72</b> %	76%	66%	66%	59%	74%	79%	77%
Yes, it should increase them strongly	38%	43%	31%	30%	28%	33%	46%	41%
Yes, but just a slight increase	34%	33%	34%	36%	31%	41%	33%	35%
Total - No	27%	24%	33%	34%	41%	26%	21%	23%
No, no increase	22%	18%	27%	26%	31%	21%	16%	21%
No, it should reduce them	6%	6%	6%	8%	10%	5%	5%	3%



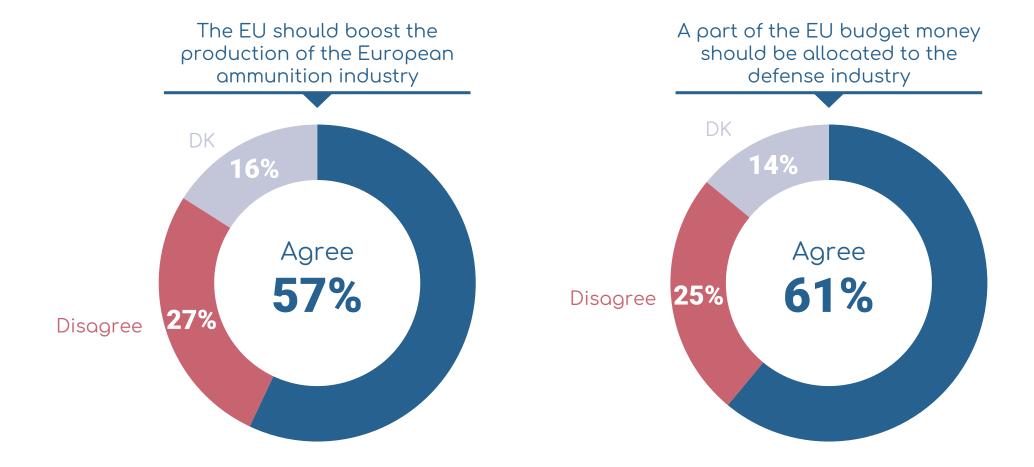
# The increase of the defense budget of its own country in case of a reduction of US support

		ерр	S&D	renew europe.	DEN'ITY AND DEMOCRACY	ECR GROUP	THE GREENS-VERA	THE	
	TOTAL	EPP	S&D	RE	ID	ECR	Greens	GUE/NGL	Not affiliated
Base	5012	729	692	331	455	342	187	178	566
Total – Should increase	<b>72</b> %	89%	78%	79%	66%	80%	80%	59%	63%
Yes, they should increase defense investments strongly	38%	51%	43%	43%	36%	51%	35%	26%	31%
Yes, but just a slight increase in defense investments	34%	38%	35%	36%	30%	29%	45%	34%	32%
Total – Shouldn't increase	27%	11%	22%	21%	34%	20%	20%	41%	37%
No, no increase	22%	9%	19%	19%	26%	17%	19%	31%	26%
No, the EU member states should reduce defense investments	6%	2%	3%	2%	8%	3%	1%	9%	11%



#### Agreement with some EU actions regarding defence

In order to be competitive with Russia and other global powers ...





#### Agreement with some EU actions regarding defence

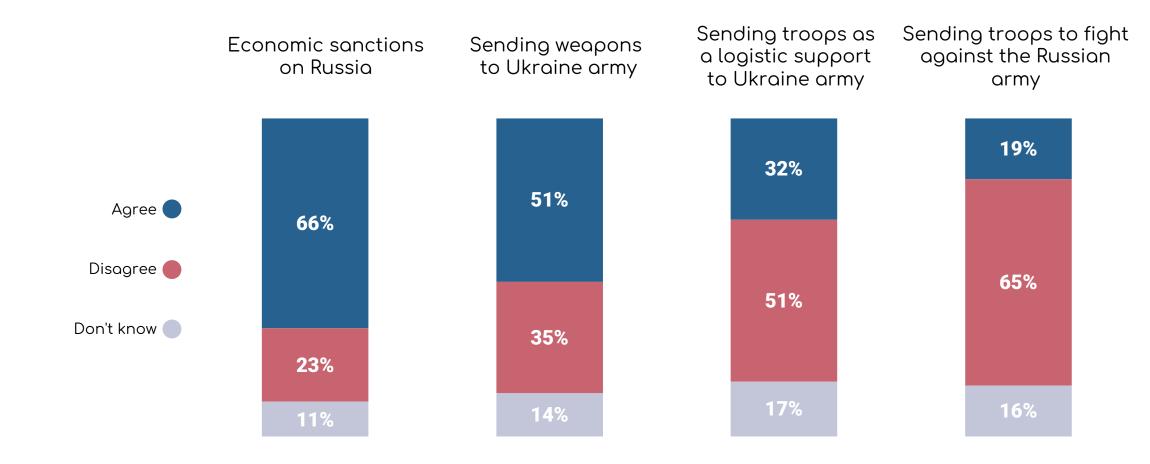
In order to be competitive with Russia and other global powers ...

All respondents: 5012

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% Agree	TOTAL	Germany	France	Southerr Europe*	italy	Spain	CEE	Northern Europe
The EU should boost the production of the European ammunition industry	5012 <b>57%</b>	949 <b>59%</b>	724 <b>55%</b>	1466 <b>50%</b>	40%	536 <b>60%</b>	65%	729 <b>62%</b>
A part of the EU budget money should be allocated to the defense industry	61%	62%	56%	54%	45%	63%	69%	64%
		ерр	S&D	renew europe.	DINITY AND DEMOCRACY	CR ROUP	THE	
% Agree	TOTAL 5012	<b>EPP</b> 729	S&D 692	<b>RE</b> 331		ECR Greens 342 187	GUE/NGL	Not affiliated 566
The EU should boost the production of the European ammunition industry	57%	75%	66%	70%		59% 62%	50%	45%
A part of the EU budget money should be allocated to the defense industry	61%	80%	67%	70%	57%	76% 64%	49%	46%



#### The actions to take in support of Ukraine





#### The actions to take in support of Ukraine

All respondents: 5012

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% Agree	TOTAL	Germany	France	Southern Europe*	Italy	Spain	CEE	Northern Europe
Base	5012	949	724	1466	677	536	1144	729
Economic sanctions on Russia	66%	60%	60%	66%	62%	75%	69%	72%
Sending weapons to Ukraine army	51%	51%	49%	48%	43%	55%	53%	59%
Sending troops as a logistic support to Ukraine army	32%	25%	29%	34%	26%	44%	31%	41%
Sending troops to fight against the Russian army	19%	15%	14%	20%	14%	27%	21%	25%

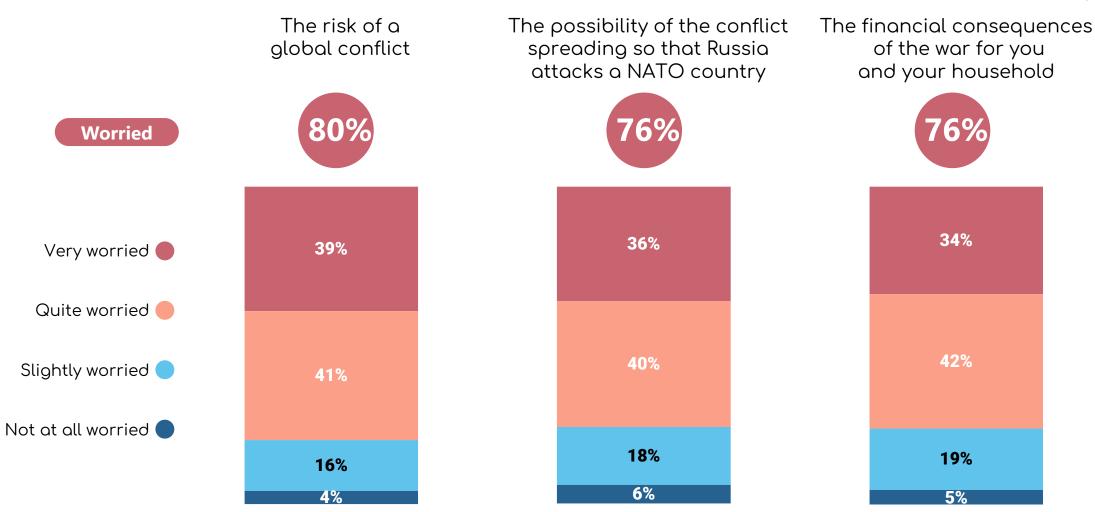


## The actions to take in support of Ukraine

		epp	S&D	renew europe.	DENTITY AND DEMOCRACY	ECR GROUP	THE GRIEBAS FERA	THEY	
% Agree	TOTAL	EPP	S&D	RE	ID	ECR	Greens	GUE/NGL	Not affiliated
Base	5012	729	692	331	455	342	187	178	566
Economic sanctions on Russia	66%	80%	79%	81%	43%	71%	81%	58%	60%
Sending weapons to Ukraine army	51%	71%	64%	68%	35%	56%	66%	48%	41%
Sending troops as a logistic support to Ukraine army	32%	39%	38%	41%	23%	33%	41%	30%	30%
Sending troops to fight against the Russian army	19%	24%	21%	24%	17%	25%	24%	20%	19%



#### **Fears related to the situation in Ukraine**





#### **Fears related to the situation in Ukraine**

All respondents: 5012

	TOTAL	Germany	France	Southern	Italy	Spain	CEE	Northern
% Worried Base	5012	949	724	Europe* 1466	677	536	1144	Europe 729
The risk of a global conflict	80%	79%	78%	83%	83%	83%	79%	78%
The possibility of the conflict spreading so that Russia attacks a NATO country	76%	74%	74%	80%	81%	81%	73%	75%
The financial consequences of the war for you and your household	76%	70%	75%	81%	82%	78%	79%	69%

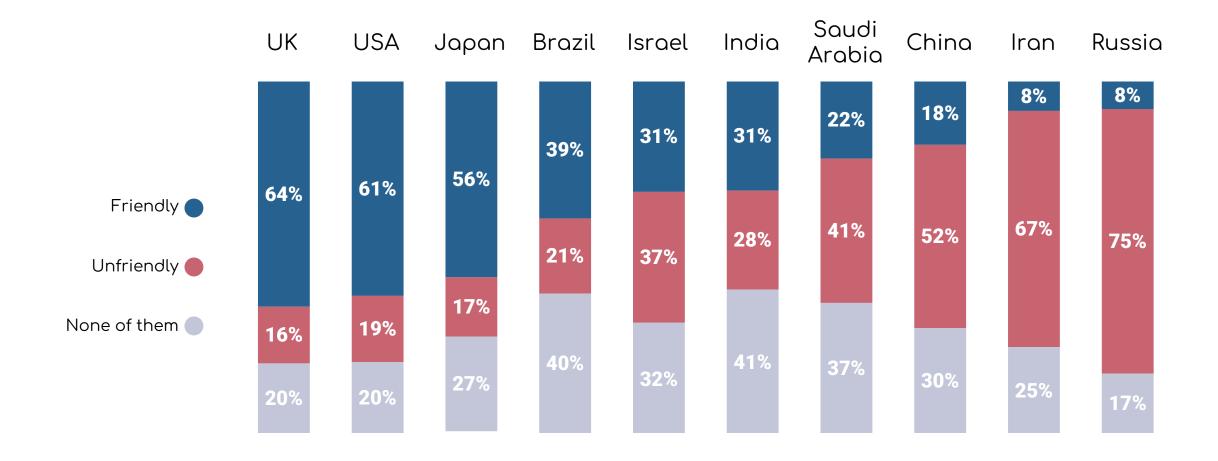


#### **Fears related to the situation in Ukraine**

		epp ***********************************	S&D	renew europe.	DENTITY AND DEMOCRACY	ECR	THE GREEN'S FEA	THEY	
% Worried	TOTAL	EPP	S&D	RE	ID	ECR	Greens	GUE/NGL	Not affiliated
Base	5012	729	692	331	455	342	187	178	566
The risk of a global conflict	80%	85%	83%	74%	77%	81%	78%	80%	78%
The possibility of the conflict spreading so that Russia attacks a NATO country	76%	82%	81%	73%	69%	78%	74%	77%	71%
The financial consequences of the war for you and your household	76%	76%	75%	69%	81%	80%	68%	75%	78%



#### **Countries friendly and unfriendly to the EU**





### **Countries friendly and unfriendly to the EU**

All respondents: 5012

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% Friendly		TOTAL	Germany	France	Southern Europe*	Italy	Spain	CEE	Northern Europe
	Base	5012	949	724	1466	677	536	1144	729
	UK	64%	61%	60%	64%	57%	72%	68%	67%
	USA	61%	52%	53%	67%	63%	70%	66%	61%
	Japan	56%	58%	48%	58%	56%	61%	57%	55%
	Brazil	39%	38%	29%	45%	35%	52%	40%	38%
	Israel	31%	36%	27%	32%	32%	29%	31%	30%
	India	30%	33%	27%	31%	24%	35%	31%	30%
	Saudi Arabia	22%	21%	16%	25%	18%	32%	23%	20%
	China	18%	15%	12%	21%	16%	25%	21%	16%
	Iran	8%	10%	6%	7%	5%	9%	10%	9%
	Russia	8%	11%	7%	7%	7%	7%	8%	7%

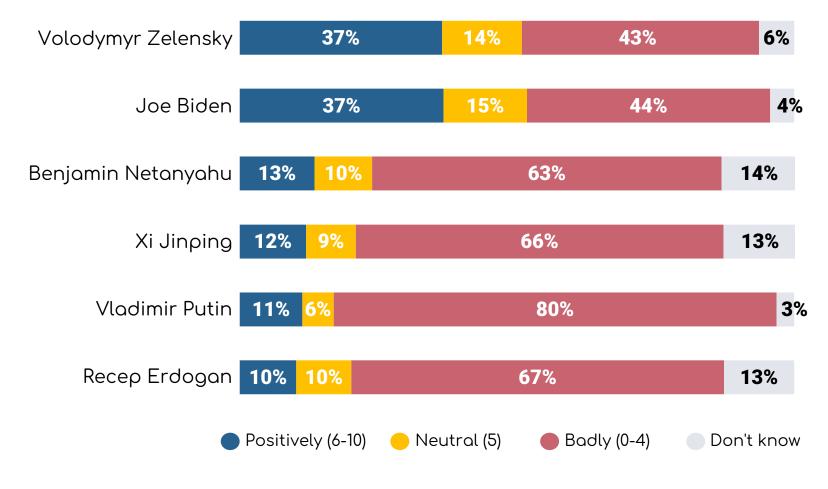


### **Countries friendly and unfriendly to the EU**

			epp	S&D	renew europe.	DENTITY AND DEMOCRACY	ECR GROUP	THE GREEN SEPA	THEY	
% Friendly		TOTAL	EPP	S&D	RE	ID	ECR	Greens	GUE/NGL	Not affiliated
	Base	5012	729	692	331	455	342	187	178	566
	UK	64%	77%	71%	72%	59%	72%	66%	57%	61%
	USA	61%	75%	70%	66%	48%	72%	58%	49%	57%
	Japan	56%	66%	64%	66%	48%	62%	64%	54%	57%
	Brazil	39%	42%	43%	40%	39%	38%	39%	45%	46%
	Israel	31%	39%	33%	41%	30%	38%	36%	24%	28%
	India	30%	34%	32%	35%	30%	29%	34%	37%	34%
	Saudi Arabia	22%	26%	25%	26%	18%	25%	19%	28%	23%
	China	18%	19%	18%	16%	15%	18%	15%	25%	25%
	Iran	8%	10%	8%	6%	7%	10%	12%	15%	9%
	Russia	8%	8%	5%	6%	12%	7%	7%	12%	13%



#### Image of the main world leaders





## Image of the main world leaders

All respondents: 5012

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Positively (Marks 6-10)	TOTAL	Germany	France	Southern Europe*	Italy	Spain	CEE	Northern Europe
Base	5012	949	724	1466	677	536	1144	729
Volodymyr Zelensky	37%	44%	42%	27%	28%	24%	40%	36%
Joe Biden	37%	32%	41%	32%	30%	35%	40%	41%
Benjamin Netanyahu	13%	12%	15%	11%	10%	12%	17%	13%
Xi Jinping	12%	11%	9%	12%	13%	12%	14%	10%
Vladimir Putin	11%	14%	13%	9%	10%	7%	12%	10%
Recep Erdogan	10%	9%	8%	8%	9%	7%	16%	9%



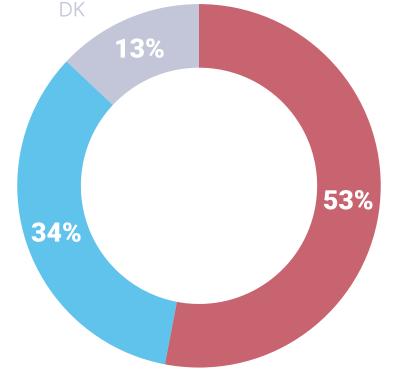
#### **Image of the main world leaders**

		epp	S&D	renew europe.	DENITY AND DEMOCRACY	ECR GROUP	THE GREENS / EFA	THEY	
Positively (Marks 6-10)	TOTAL	EPP	S&D	RE	ID	ECR	Greens	GUE/NGL	Not affiliated
Base	5012	729	692	331	455	342	187	178	566
Volodymyr Zelensky	37%	47%	49%	49%	25%	37%	50%	34%	34%
Joe Biden	37%	52%	52%	49%	26%	36%	50%	33%	30%
Benjamin Netanyahu	13%	19%	13%	13%	19%	22%	10%	13%	14%
Xi Jinping	12%	12%	13%	10%	13%	12%	9%	13%	17%
Vladimir Putin	11%	8%	10%	8%	22%	14%	7%	14%	16%
Recep Erdogan	10%	10%	11%	12%	11%	15%	7%	18%	13%

# The expected reaction of the EU institutions following Putin's victory in Russian Presidential elections

All respondents: 5012





A severe criticism, I think elections in Russia are not free



# The expected reaction of the EU institutions following Putin's victory in Russian Presidential elections

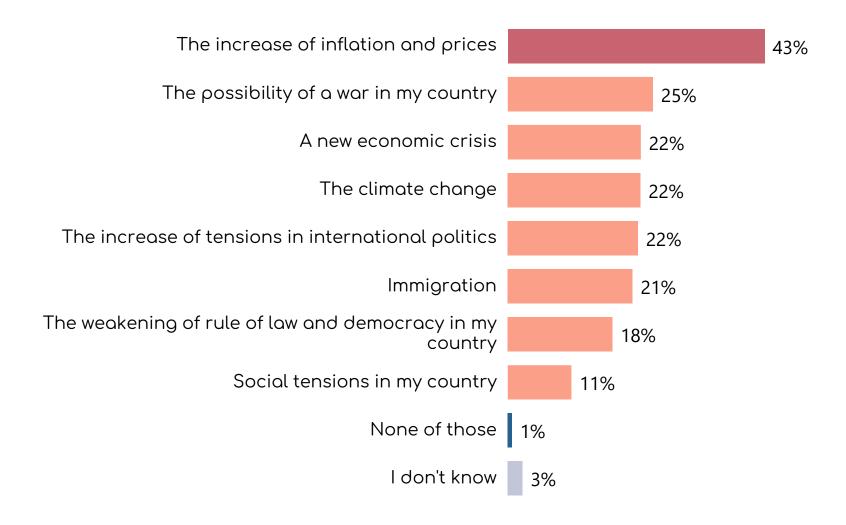
All respondents: 5012

	TOTAL	Germany	France	Southerr Europe*	11(11)	Spain	CEE	Northern Europe
Base	5012	949	724	1466	677	536	1144	729
A severe criticism, I think elections in Russia are not free	53%	56%	49%	53%	51%	59%	51%	58%
No particular reaction, EU should not interfere with Russian internal matters	34%	34%	33%	34%	36%	30%	36%	27%
		ерр	S&D	renew europe.	DIN ITY AND DEMOCRACY	ECR GROUP	THE	
	TOTAL	EPP	S&D	RE	ID	ECR Green		Not affiliated
Base	5012	729	692	331	455	342 187	178	566
A severe criticism, I think elections in Russia are not free	53%	66%	65%	69%	41%	50% 69%	48%	50%
No particular reaction, EU should not interfere with Russian internal matters	34%	25%	28%	26%	49%	42% 20%		38%



# 2 EUROPEAN ELECTIONS AND EU FUTURE







### The most worrying threats

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	TOTAL	Germany	France	Southern Europe*	Italy	Spain	CEE	Northern Europe
Base	5012	949	724	1466	677	536	1144	729
The increase of inflation and prices	43%	39%	44%	42%	34%	51%	50%	40%
The possibility of a war in my country	25%	25%	18%	18%	18%	19%	39%	21%
A new economic crisis	22%	16%	17%	29%	26%	28%	23%	23%
The climate change	22%	25%	22%	26%	27%	25%	14%	24%
The increase of tensions in international politics	22%	18%	20%	27%	34%	21%	19%	24%
Immigration	21%	30%	25%	15%	12%	17%	14%	28%
The weakening of rule of law and democracy in my country	18%	16%	17%	22%	23%	20%	17%	13%
Social tensions in my country	11%	15%	11%	8%	9%	7%	11%	11%
None of those	1%	1%	1%	-	-	-	1%	1%

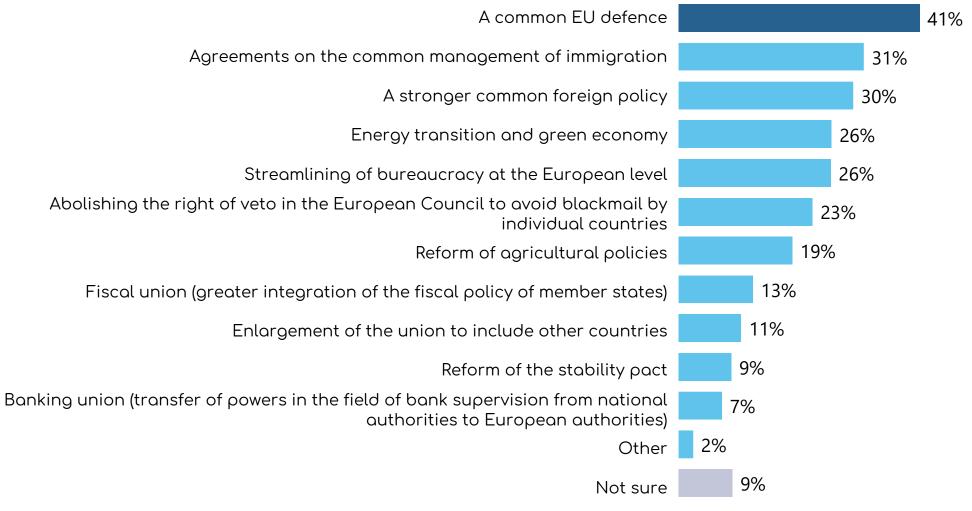


# The most worrying threats

		ерр	S&D	renew europe.	PENITY AND DEMOCRACY	ECR GROUP	THE ORIENS/FEA	THEY	
	TOTAL	EPP	S&D	RE	ID	ECR	Greens	GUE/NGL	Not affiliated
Base	5012	729	692	331	455	342	187	178	566
The increase of inflation and prices	43%	40%	40%	35%	51%	39%	35%	48%	44%
The possibility of a war in my country	25%	28%	23%	22%	17%	30%	21%	19%	26%
A new economic crisis	22%	26%	21%	26%	19%	25%	10%	20%	21%
The climate change	22%	20%	31%	25%	9%	10%	55%	29%	28%
The increase of tensions in international politics	22%	24%	28%	32%	12%	19%	28%	20%	21%
Immigration	21%	23%	10%	17%	53%	35%	14%	13%	17%
The weakening of rule of law and democracy in my country	18%	17%	23%	18%	13%	19%	15%	23%	22%
Social tensions in my country	11%	11%	12%	8%	12%	13%	10%	19%	10%
None of those	1%	-	-	-	1%	-	-	-	1%



#### The priorities for the European Union





### The priorities for the European Union

All respondents: 5012

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	TOTAL	Germany	France	Southern Europe*	Italy	Spain	CEE	Northern Europe
Base	5012	949	724	1466	677	536	1144	729
A common EU defence	41%	42%	32%	38%	30%	42%	49%	41%
Agreements on the common management of immigration	31%	40%	33%	34%	33%	31%	20%	31%
A stronger common foreign policy	30%	33%	17%	33%	33%	31%	30%	30%
Energy transition and green economy	26%	22%	24%	28%	28%	28%	24%	30%
Streamlining of bureaucracy at the European level	26%	32%	24%	20%	21%	19%	31%	22%
Abolishing the right of veto in the European Council to avoid blackmail by individual countries	23%	24%	17%	22%	28%	19%	25%	25%
Reform of agricultural policies	19%	12%	25%	20%	12%	28%	23%	15%
Fiscal union (greater integration of the fiscal policy of member states)	13%	7%	13%	20%	23%	19%	10%	9%
Enlargement of the union to include other countries	11%	10%	6%	10%	6%	14%	15%	11%
Reform of the stability pact	9%	6%	6%	11%	12%	8%	10%	9%
Banking union (transfer of powers in the field of bank supervision from national authorities to European authorities)	7%	5%	7%	9%	7%	12%	7%	7%
Other	2%	3%	2%	2%	2%	2%	2%	3%
Not sure	9%	9%	15%	7%	8%	5%	7%	10%



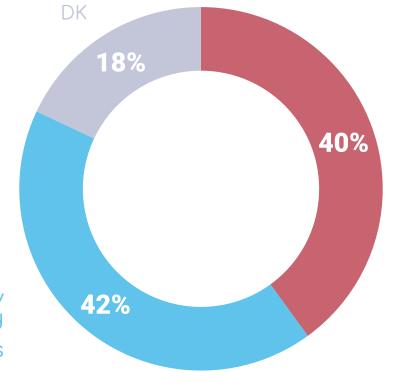
# The priorities for the European Union

		epp	S&D	renew europe.	DENTITY AND DEMOCRACY	ECR	THE GREENS (FFA	THEY	
	TOTAL	EPP	S&D	RE	ID	ECR	Greens	GUE/NGL	Not affiliated
Base	5012	729	692	331	455	342	187	178	566
A common EU defence	41%	56%	48%	47%	29%	39%	38%	31%	35%
Agreements on the common management of immigration	31%	35%	27%	30%	48%	43%	23%	23%	25%
A stronger common foreign policy	30%	35%	39%	34%	18%	27%	30%	22%	27%
Energy transition and green economy	26%	23%	31%	23%	13%	15%	53%	41%	34%
Streamlining of bureaucracy at the European level	26%	26%	22%	27%	29%	31%	23%	30%	24%
Abolishing the right of veto in the European Council to avoid blackmail by individual countries	23%	25%	28%	31%	17%	20%	24%	23%	22%
Reform of agricultural policies	19%	18%	19%	18%	23%	25%	18%	22%	21%
Fiscal union (greater integration of the fiscal policy of member states)	13%	12%	16%	17%	10%	17%	9%	12%	15%
Enlargement of the union to include other countries	11%	13%	14%	9%	5%	10%	11%	13%	12%
Reform of the stability pact	9%	9%	8%	11%	8%	11%	4%	11%	11%
Banking union (transfer of powers in the field of bank supervision from national authorities to European authorities)	7%	8%	8%	7%	6%	10%	5%	7%	10%
Other	2%	1%	1%	1%	5%	2%	1%	2%	4%
Not sure	9%	3%	4%	4%	11%	5%	5%	5%	7%
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#### **Expectations towards EU green policies**

All respondents: 5012



A strict emission reduction policy aimed at converting to sustainable economy as fast as possible

A more industry-friendly green policy with reduced emission reduction targets



# **Expectations towards EU green policies**

Base	<b>TOTAL</b> 5012	Germany 949	France 724	Southern Europe*	ITOIM	Spain 536	CEE 1144	Northern Europe
A strict emission reduction policy aimed at converting to sustainable economy as fast as possible	40%	42%	38%	47%	49%	42%	32%	39%
A more industry-friendly green policy with reduced emission reduction targets	42%	38%	36%	43%	39%	48%	53%	37%
		erous rouls para	S&D	renew europe.	DENTITY AND DEMOCRACY	ECR S R O U P	THE	
	TOTAL	EPP	S&D S&D			ECR Greens		Not affiliated
Base  A strict emission reduction colicy aimed at	<b>TOTAL</b> 5012	a social stades and con-		europe.	ID			
A strict emission reduction policy aimed at converting to sustainable economy as fast as possible		EPP	S&D	RE	ID 455	ECR Greens	GUE/NGL	affiliated



#### **Importance of 2024's European Elections**

All respondents: 5012

More important than usually **52%** 

There is no difference with previous European elections

39%

Less important than usually **9%** 



#### **Importance of 2024's European Elections**

	TOTAL	Germany	France	Southern Europe*	Italy	Spain	CEE	Northern Europe
Base	5012	949	724	1466	677	536	1144	729
More important than usually	52%	56%	42%	55%	56%	54%	52%	50%
Less important than usually	9%	8%	11%	8%	9%	7%	9%	10%
No difference with previous elections	39%	36%	46%	37%	36%	39%	39%	40%











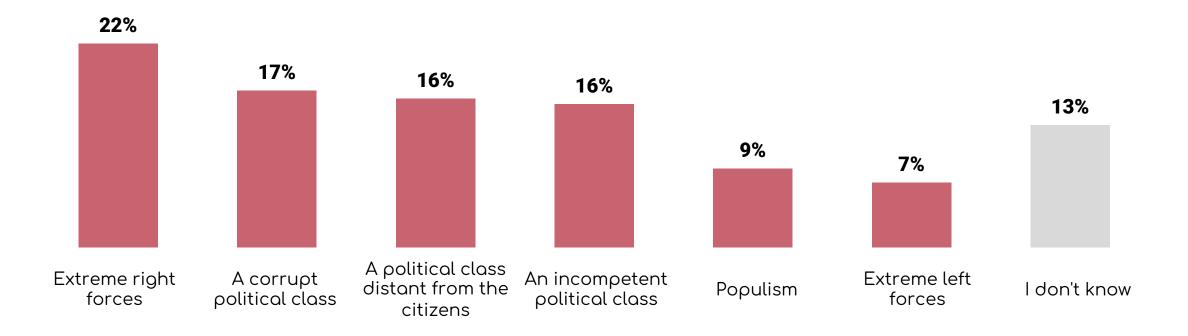




					AND DEMOCRACY				
	TOTAL	EPP	S&D	RE	ID	ECR	Greens	GUE/NGL	Not affiliated
Base	5012	729	692	331	455	342	187	178	566
More important than usually	52%	58%	64%	59%	54%	59%	63%	43%	53%
Less important than usually	9%	8%	7%	8%	11%	10%	9%	16%	9%
No difference with previous elections	39%	35%	29%	32%	35%	31%	28%	41%	37%



#### The main threat to the future of the European Union





#### The main threat to the future of the European Union

All respondents: 5012

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	TOTAL	Germany	France	Southern Europe*	Italy	Spain	CEE	Northern Europe
Base	5012	949	724	1466	677	536	1144	729
Extreme right forces	22%	31%	23%	22%	20%	23%	13%	24%
A corrupt political class	17%	10%	12%	19%	12%	20%	26%	15%
A political class distant from the citizens	16%	21%	13%	15%	16%	15%	16%	16%
An incompetent political class	16%	16%	11%	20%	25%	18%	15%	12%
Populism	9%	7%	10%	9%	11%	8%	8%	9%
Extreme left forces	7%	6%	11%	6%	5%	8%	7%	8%



#### The main threat to the future of the European Union

		ерр	S&D	renew europe.	IDENTITY AND DEMOCRACY	ECR © R O U P	THE ORIGINATION	THE	
	TOTAL	EPP	S&D	RE	ID	ECR	Greens	GUE/NGL	Not affiliated
Base	5012	729	692	331	455	342	187	178	566
Extreme right forces	22%	26%	41%	27%	6%	6%	42%	34%	22%
A corrupt political class	17%	15%	13%	16%	21%	21%	13%	12%	21%
A political class distant from the citizens	16%	18%	12%	13%	22%	24%	12%	22%	15%
An incompetent political class	16%	16%	15%	14%	19%	15%	10%	6%	16%
Populism	9%	11%	12%	17%	3%	7%	16%	10%	7%
Extreme left forces	7%	7%	3%	6%	19%	20%	4%	6%	6%



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