



EUROSCOPE

The pulse of the European public Opinion

November 2025
HIGHLIGHTS



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 5.115 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, with breakdowns for the 5 largest countries (Germany, France, Italy, Spain and Poland) and for 3 different areas: 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 14th and 24th of November 2025.



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



1) Germany

2) France



3) CEE – Central and 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, Spain and Poland.

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



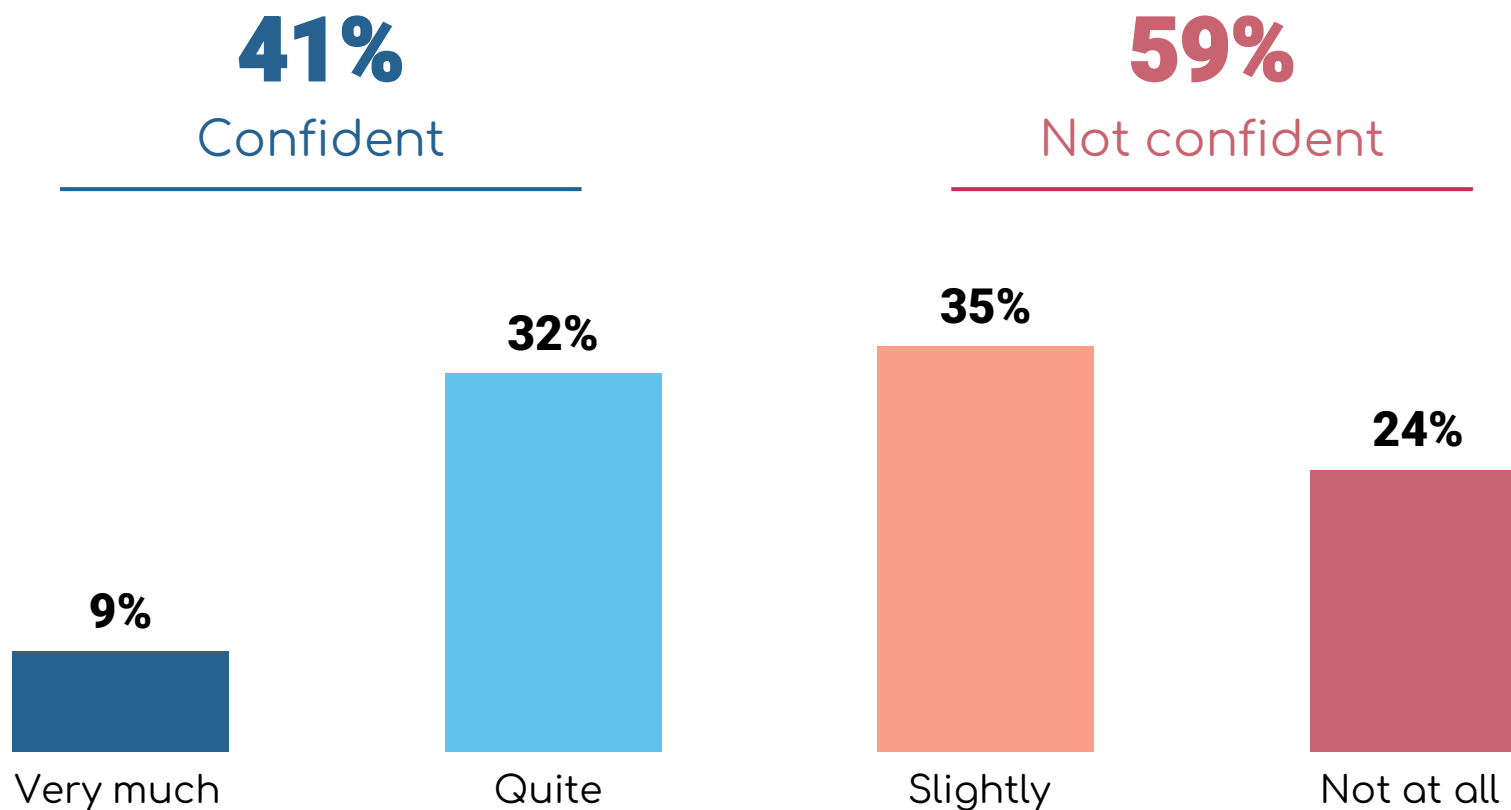
1

The European Institutions: *Image, leadership & Policies*



Level of Confidence in the new European Commission

All respondents: 5.115

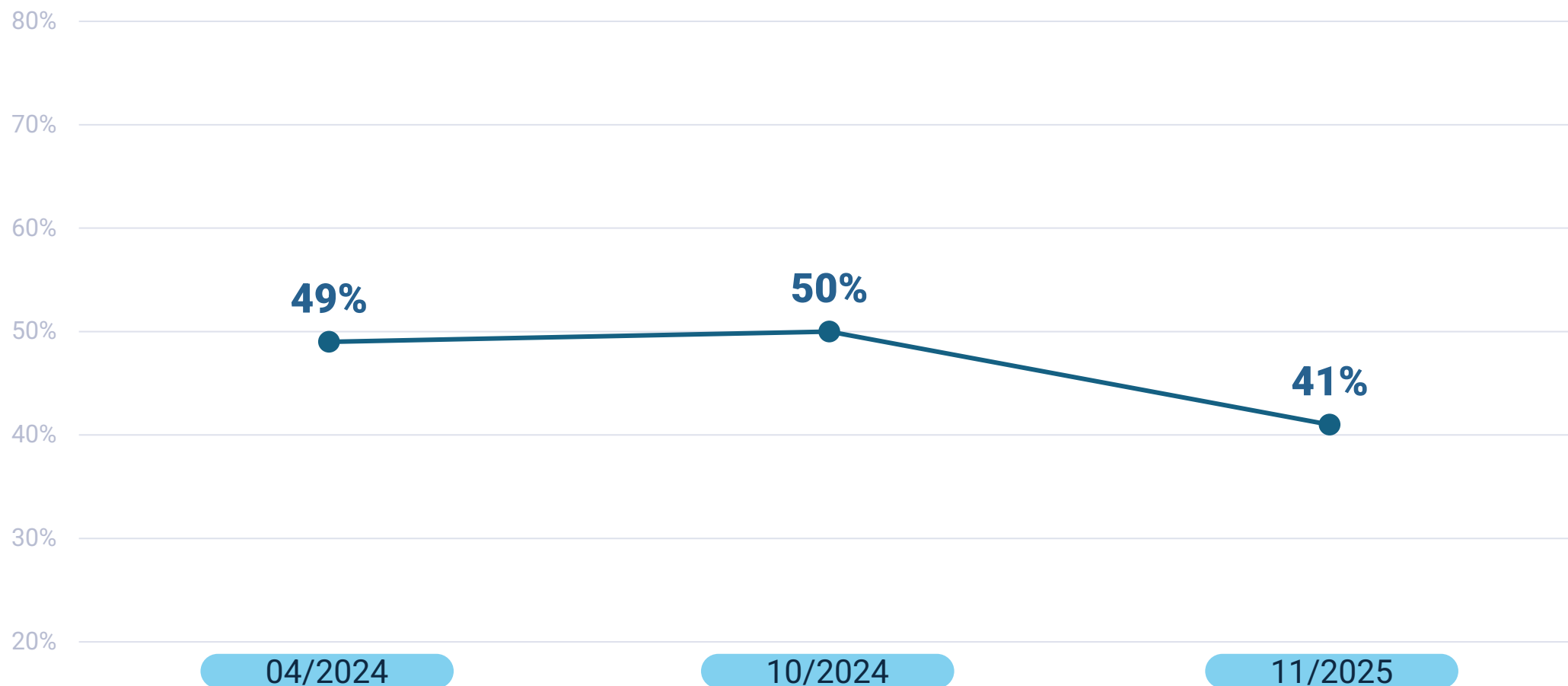




Level of Confidence in the new European Commission

All respondents: 5.115

% of Europeans confident in the European Commission















Level of Confidence in the new European Commission

All respondents: 5.115

Split according to
the vote for the
European groups

| |  TOTAL UE27 |  GUE/NGL |  S&D |  Greens |  RE |  EPP |  ECR |  Patriots |  ESN |  Unaffiliated |
|-----------------------|--|--|---|---|---|--|--|---|--|---|
| Base | 5.115 | 220 | 827 | 200 | 390 | 738 | 307 | 469 | 186 | 664 |
| TOTAL High confidence | 41% | 43% | 57% | 55% | 58% | 56% | 29% | 26% | 18% | 36% |
| Very much | 9% | 9% | 12% | 10% | 13% | 12% | 7% | 6% | 9% | 7% |
| Quite | 32% | 34% | 45% | 45% | 45% | 44% | 22% | 20% | 9% | 29% |
| TOTAL Low confidence | 59% | 57% | 43% | 45% | 42% | 44% | 71% | 74% | 82% | 64% |
| Slightly | 35% | 33% | 35% | 31% | 30% | 33% | 37% | 32% | 21% | 36% |
| Not at all | 24% | 24% | 8% | 14% | 12% | 11% | 34% | 42% | 61% | 28% |



Opinions on leading political figures in Europe

All respondents: 5.115



Giorgia Meloni



Emmanuel Macron



Ursula von der Leyen



Pedro Sanchez



Friedrich Merz



Donald Tusk



Roberta Metsola



Antonio Costa

A good opinion

36%

36%

34%

27%

26%

25%

21%

20%

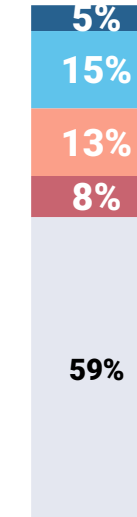
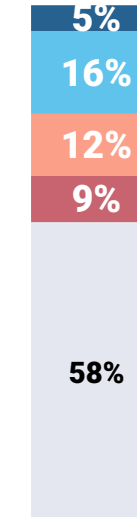
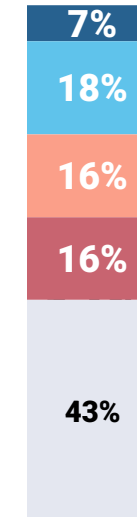
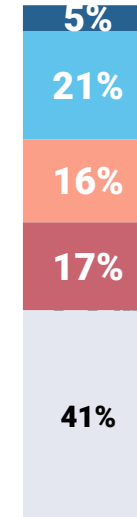
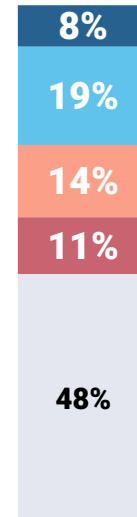
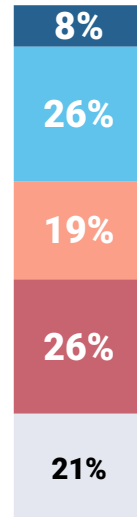
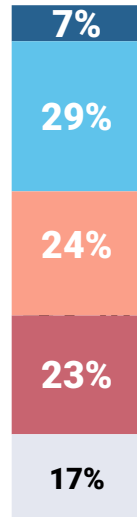
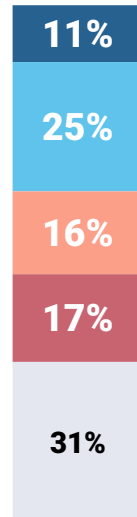
A very good opinion ●

A fairly good opinion ●

A fairly bad opinion ●

A very bad opinion ●

Don't know this leader enough to say ●



A bad opinion

33%

47%

45%

25%

33%

32%

21%

21%



Opinions on leading political figures in Europe – Time series

| | | Emmanuel Macron | Giorgia Meloni | Ursula von der Leyen | Friedrich Merz | Pedro Sanchez | Donald Tusk | Antonio Costa | Roberta Metsola |
|----------------|------------|--------------------|-------------------|-------------------------|-------------------|------------------|----------------|------------------|--------------------|
| A good opinion | May '25 | 48% | 39% | 40% | 31% | 33% | 32% | 27% | 26% |
| | Sept '25 | 41% | 40% | 36% | 32% | 31% | 29% | 27% | 24% |
| | Nov '25 | 36% | 36% | 34% | 26% | 27% | 25% | 20% | 21% |
| A bad opinion | May '25 | 38% | 32% | 40% | 27% | 21% | 27% | 16% | 17% |
| | Sept '25 | 45% | 36% | 45% | 30% | 25% | 31% | 18% | 24% |
| | Nov '25 | 47% | 33% | 45% | 33% | 25% | 32% | 21% | 21% |
| Approval index | May '25 | +10 | +7 | 0 | +4 | +12 | +5 | +11 | +9 |
| | Sept '25 | -4 | +4 | -9 | +2 | +6 | -2 | +9 | 0 |
| | Nov '25 | -11 | +3 | -11 | -7 | +2 | -7 | -1 | 0 |
| | Difference | -7 | -1 | -2 | -9 | -4 | -5 | -10 | = |



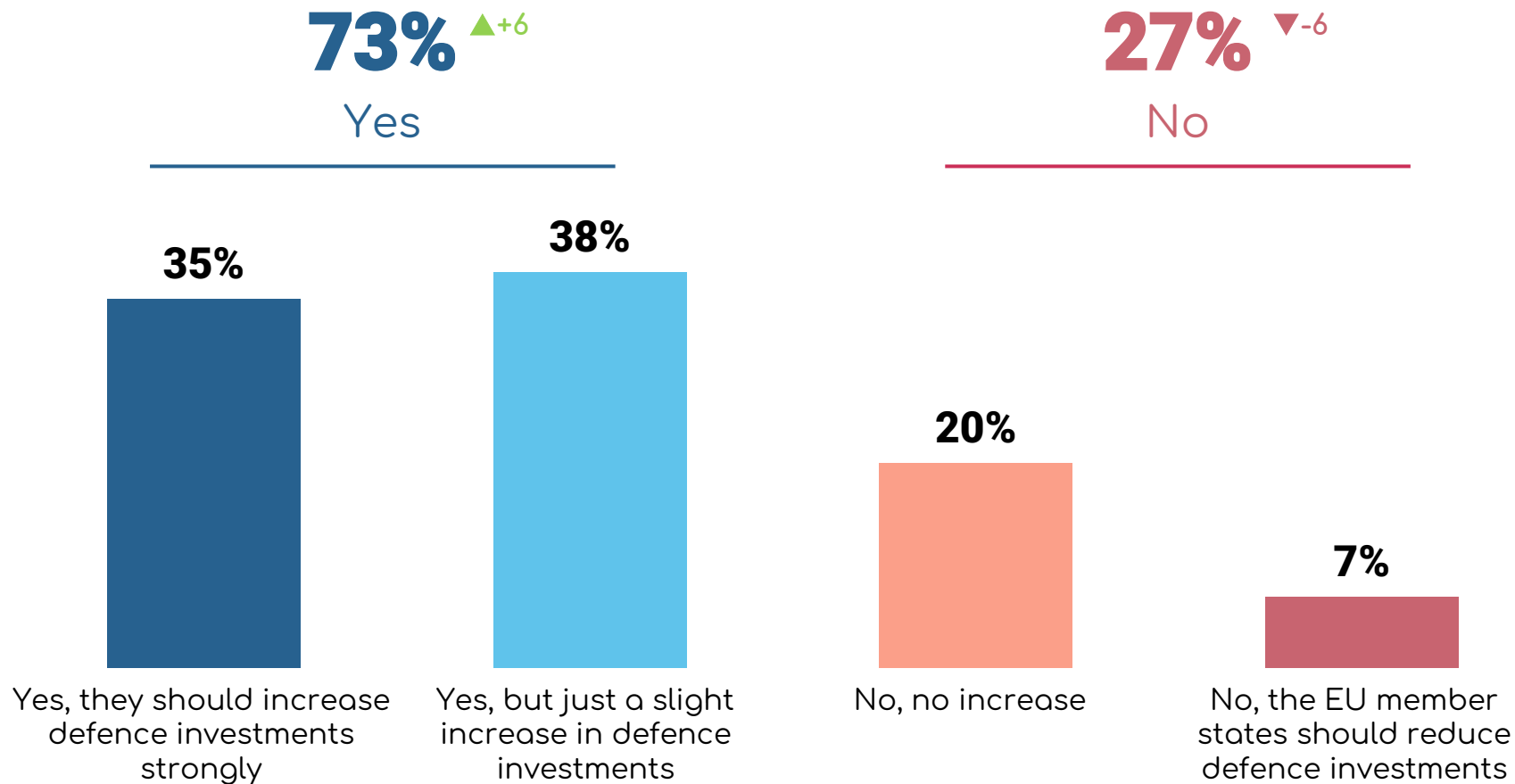
2

The European Defense & the Russo-Ukrainian conflict



Support for Increasing EU Defense Investments

All respondents: 5.115



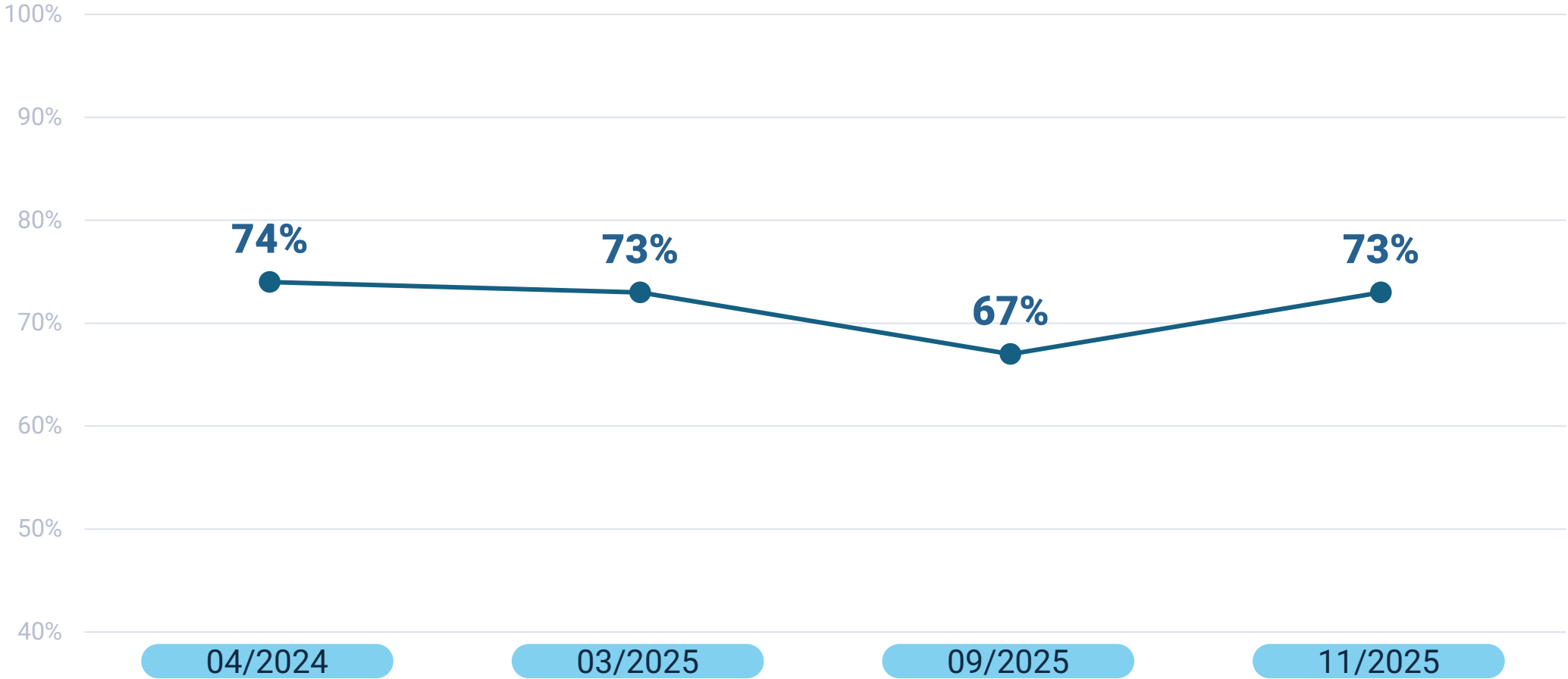
▲ ▼ Evolutions vs September 2025



Support for Increasing EU Defense Investments

All respondents: 5.115

% The EU should increase investments in defense





Support for Increasing EU Defense Investments

All respondents: 5.115

Split according to geographical areas

Base:

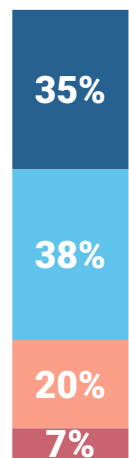
Total YES



TOTAL
UE27

5.115

73%



Total NO

27%



France

649

73%



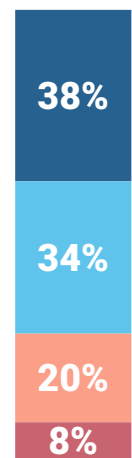
27%



Germany

848

72%



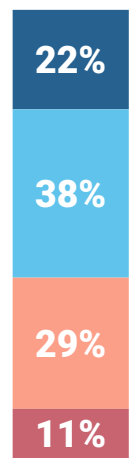
28%



Italy

585

60%



40%



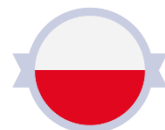
Spain

551

74%



26%



Poland

426

93%



7%



Southern
Europe

1376

67%



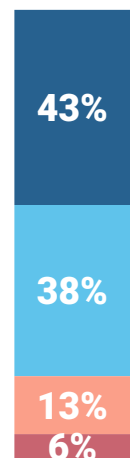
33%



CEE

1241

81%



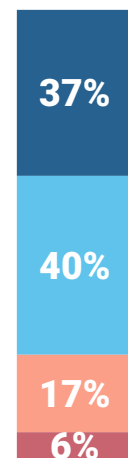
19%



Northern
Europe

1001

77%













23%



Support for Increasing EU Defense Investments

All respondents: 5.115

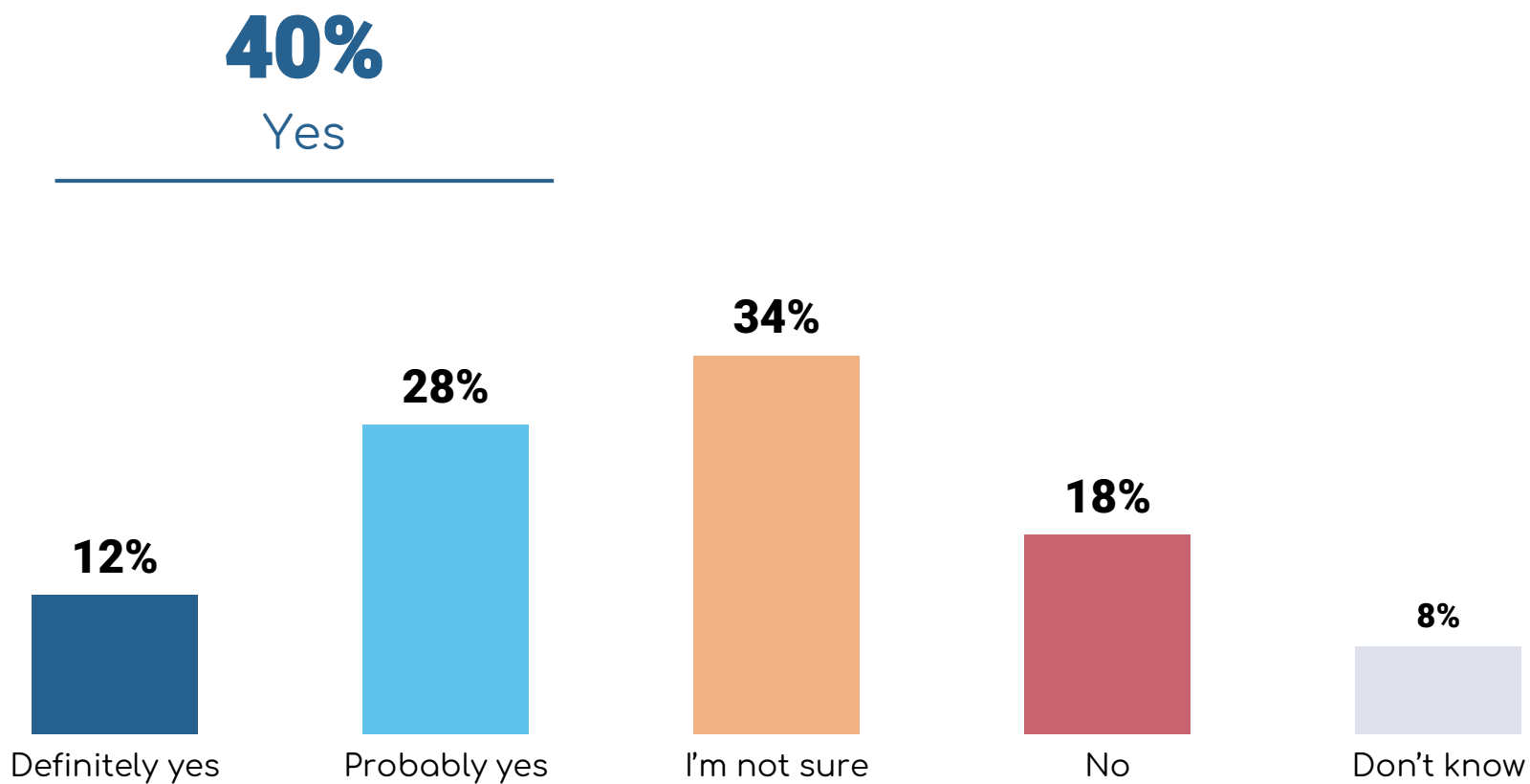
Split according to the vote for the European groups

| |  |  |  |  |  |  |  |  |  |  |
|--|---|---|--|---|---|---|---|---|---|---|
| | TOTAL UE27 | GUE/NGL | S&D | Greens | RE | EPP | ECR | Patriots | ESN | Unaffiliated |
| Base | 5.115 | 220 | 827 | 200 | 390 | 738 | 307 | 469 | 186 | 664 |
| TOTAL Yes | 73% | 67% | 76% | 76% | 86% | 88% | 84% | 73% | 62% | 59% |
| Yes, they should increase defence investments strongly | 35% | 28% | 35% | 34% | 44% | 51% | 50% | 39% | 29% | 24% |
| Yes, but just a slight increase in defence investments | 38% | 39% | 41% | 42% | 42% | 37% | 34% | 34% | 33% | 35% |
| TOTAL No | 27% | 33% | 24% | 24% | 14% | 12% | 16% | 27% | 38% | 41% |
| No, no increase | 20% | 24% | 19% | 16% | 10% | 9% | 13% | 22% | 30% | 30% |
| No, the EU member states should reduce defence investments | 7% | 9% | 5% | 8% | 4% | 3% | 3% | 5% | 8% | 11% |



Ability to stop the drone airspace intrusions

All respondents: 5,115

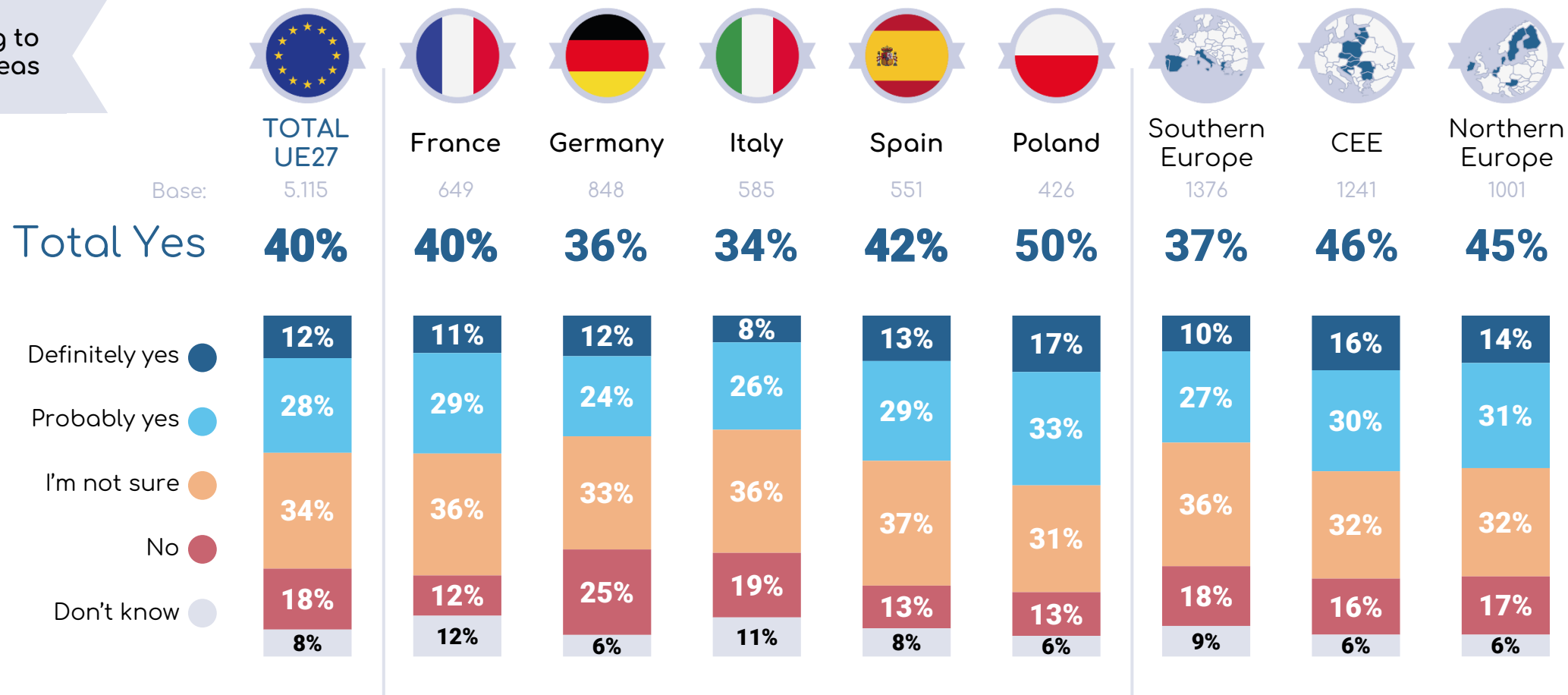




Ability to stop the drone airspace intrusions

All respondents: 5.115

Split according to geographical areas

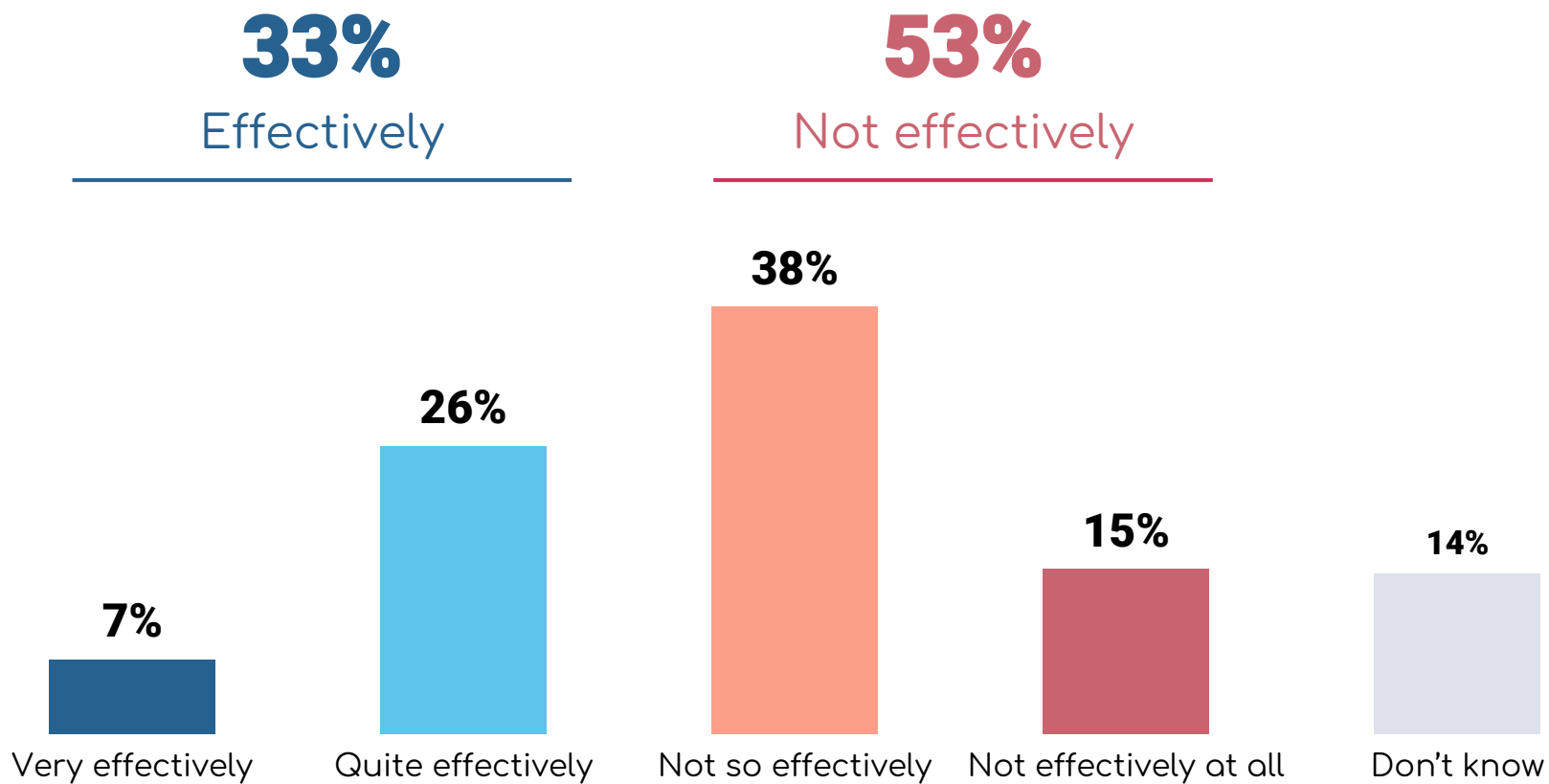


Q. If there were drone intrusions in your country over airports and military sites, do you think your country would be able to stop this disruption?



Effectiveness of the EU's Current Defense Policies

All respondents: 5.115





Effectiveness of the EU's Current Defense Policies

All respondents: 5.115

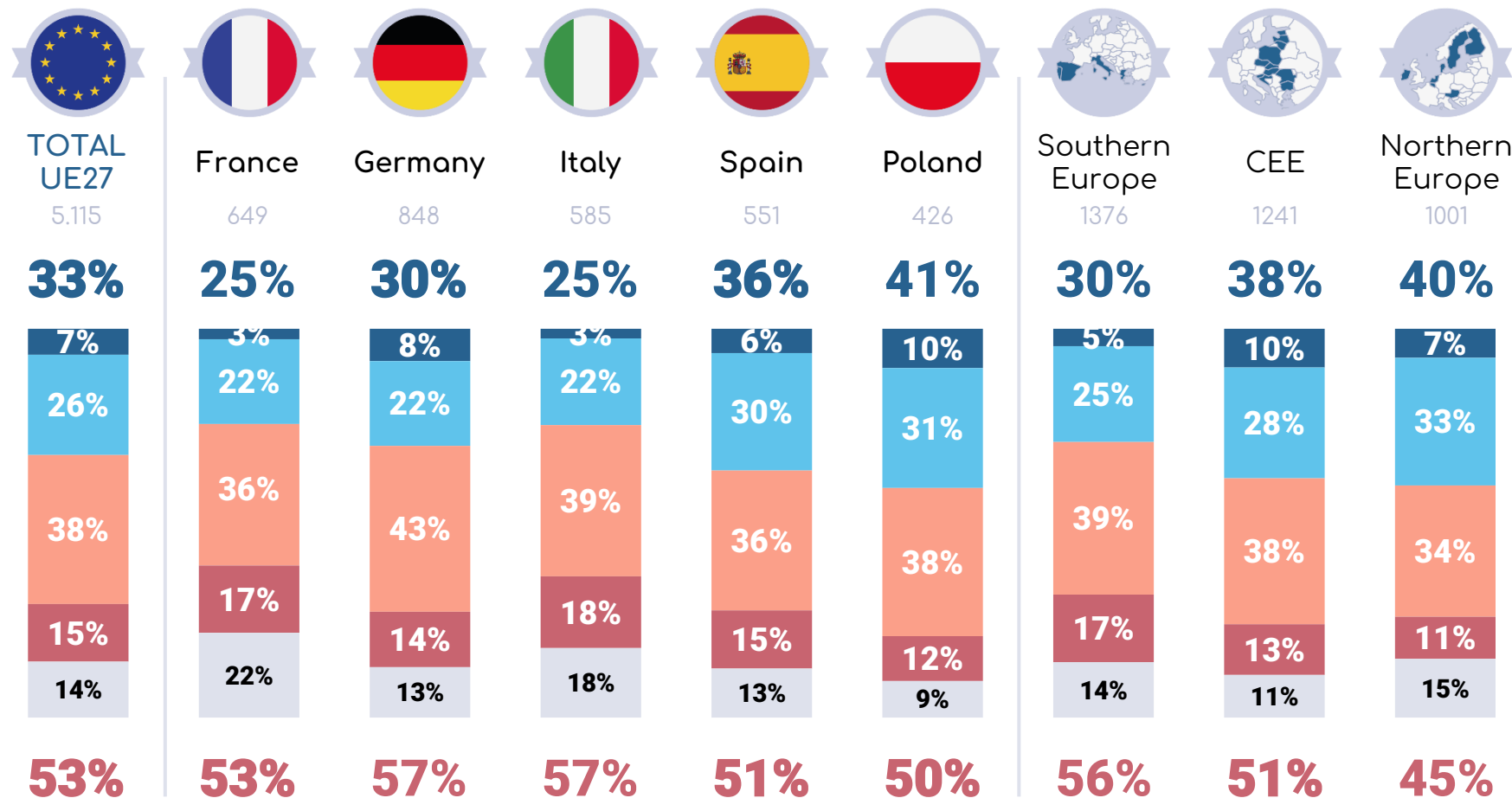
Split according to geographical areas

Base:

Total Effectively



Total Not effectively















Effectiveness of the EU's Current Defense Policies

All respondents: 5.115

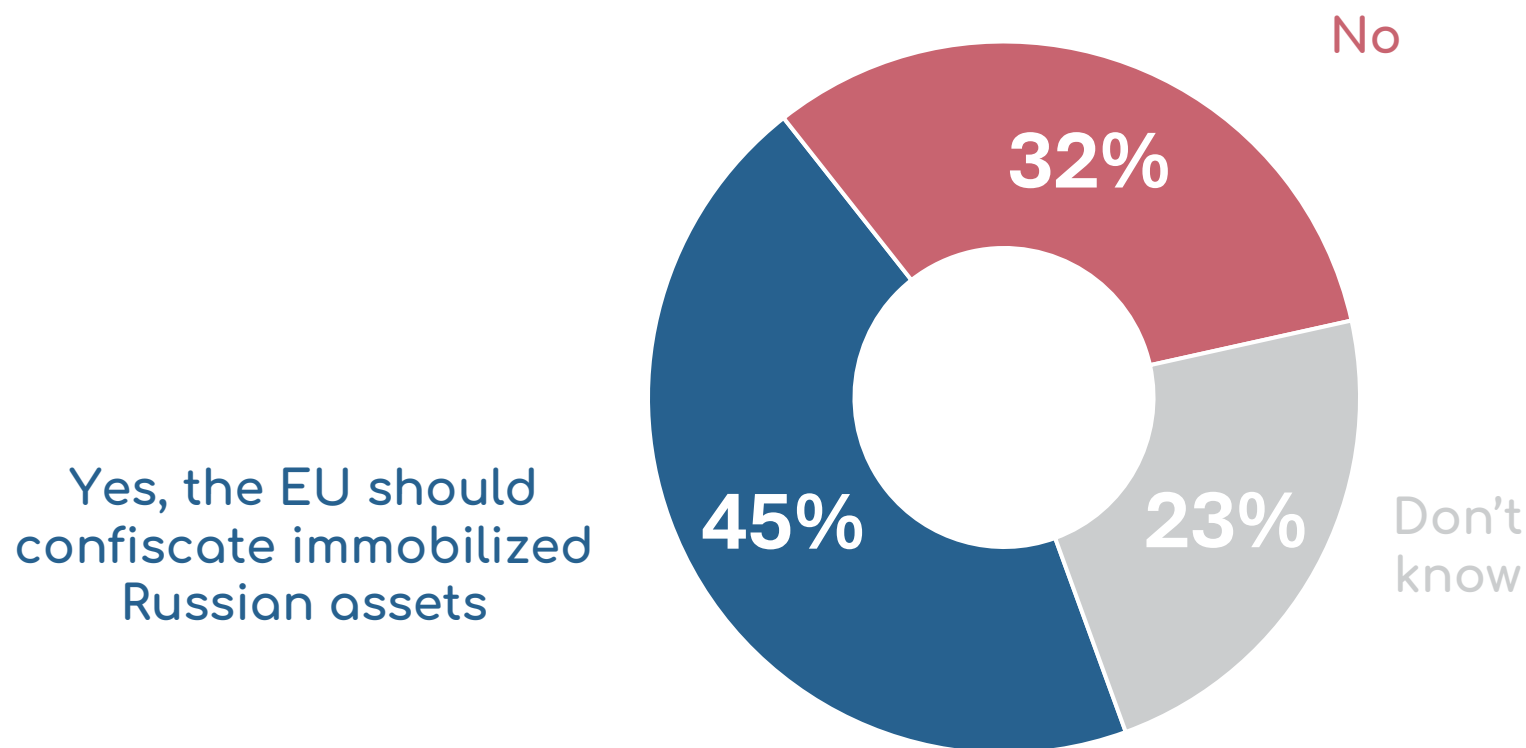
Split according to the vote for the European groups

| |  TOTAL UE27 |  GUE/NGL |  S&D |  Greens |  RE |  EPP |  ECR |  Patriots |  ESN |  Unaffiliated |
|------------------------|--|--|---|---|---|--|--|---|--|---|
| Base | 5.115 | 220 | 827 | 200 | 390 | 738 | 307 | 469 | 186 | 664 |
| TOTAL Effectively | 33% | 35% | 38% | 37% | 38% | 39% | 36% | 24% | 24% | 34% |
| Very effectively | 7% | 8% | 8% | 7% | 6% | 9% | 9% | 6% | 7% | 6% |
| Quite effectively | 26% | 27% | 30% | 30% | 32% | 30% | 27% | 18% | 17% | 28% |
| TOTAL Not effectively | 53% | 51% | 50% | 50% | 52% | 53% | 57% | 63% | 66% | 55% |
| Not so effectively | 38% | 34% | 41% | 40% | 40% | 43% | 38% | 40% | 41% | 35% |
| Not effectively at all | 15% | 17% | 9% | 10% | 12% | 10% | 19% | 23% | 25% | 20% |
| Don't know | 14% | 14% | 12% | 13% | 10% | 8% | 7% | 13% | 10% | 11% |



The EU's Use of Frozen Russian Assets for Ukraine's Defense

All respondents: 5.115





The EU's Use of Frozen Russian Assets for Ukraine's Defense

All respondents: 5.115

Split according to the vote for the European groups











| |  UE27 5.115 |  GUE/NGL 220 |  S&D 827 |  Greens 200 |  RE 390 |  EPP 738 |  ECR 307 |  Patriots 469 |  ESN 186 |  Unaffiliated 664 |
|------------|---|---|---|--|--|---|---|--|---|--|
| Yes | 45% | 46% | 54% | 58% | 59% | 60% | 50% | 39% | 21% | 37% |
| No | 32% | 34% | 24% | 26% | 25% | 23% | 32% | 41% | 63% | 43% |
| Don't know | 23% | 20% | 22% | 17% | 16% | 17% | 18% | 20% | 15% | 20% |



Image of the USA

All respondents: 5,115

22%

Improved

43%

Worsened

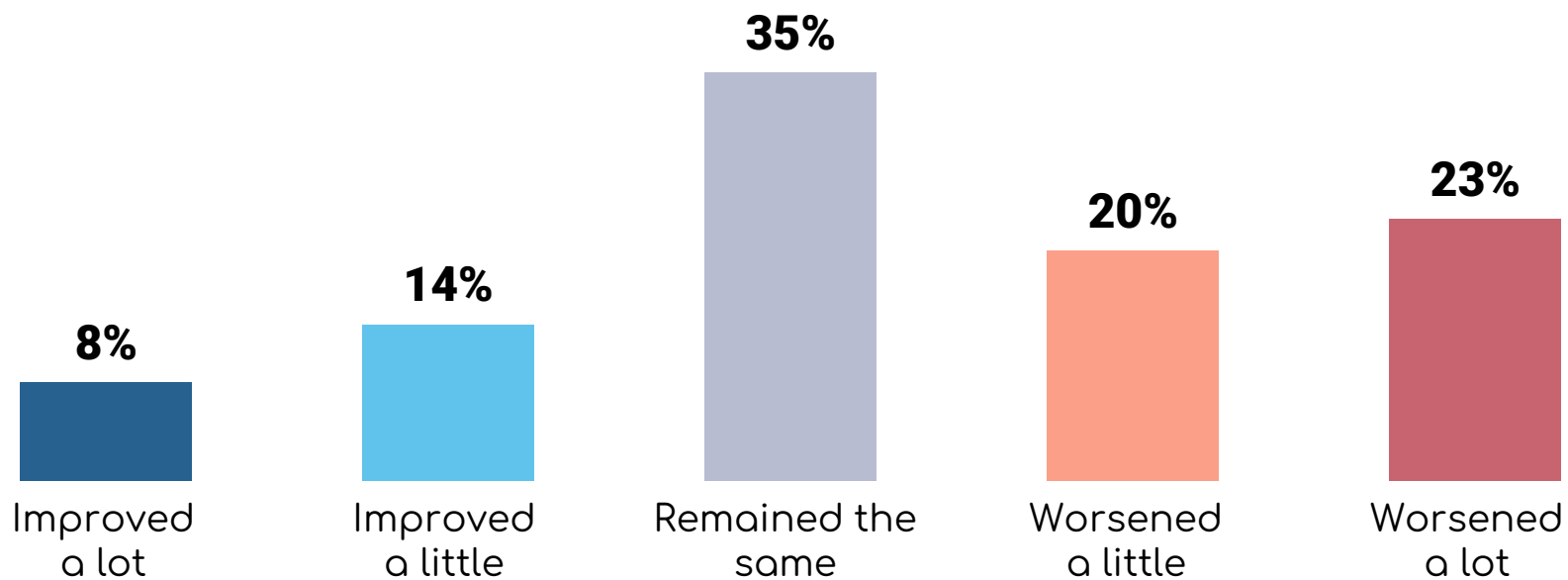














Image of the USA

All respondents: 5.115

Split according to the vote for the European groups

| |  |  |  |  |  |  |  |  |  |  |
|-------------------|---|---|--|---|---|---|---|---|---|---|
| | TOTAL UE27 | GUE/NGL | S&D | Greens | RE | EPP | ECR | Patriots | ESN | Unaffiliated |
| Base | 5.115 | 220 | 827 | 200 | 390 | 738 | 307 | 469 | 186 | 664 |
| TOTAL Improved | 22% | 21% | 18% | 23% | 19% | 26% | 40% | 29% | 28% | 24% |
| Improved a lot | 8% | 7% | 6% | 4% | 5% | 11% | 22% | 13% | 16% | 8% |
| Improved a little | 14% | 14% | 12% | 19% | 14% | 15% | 18% | 16% | 12% | 16% |
| Remained the same | 35% | 27% | 25% | 23% | 26% | 30% | 41% | 43% | 43% | 38% |
| TOTAL Worsened | 43% | 52% | 57% | 54% | 55% | 44% | 19% | 28% | 29% | 38% |
| Worsened a little | 20% | 17% | 24% | 20% | 24% | 26% | 13% | 15% | 20% | 16% |
| Worsened a lot | 23% | 35% | 33% | 34% | 31% | 18% | 6% | 13% | 9% | 22% |



3

Focus on Markets



Support for Requiring Streaming Platforms to Feature more European Content

All respondents: 5.115

Split according to geographical areas

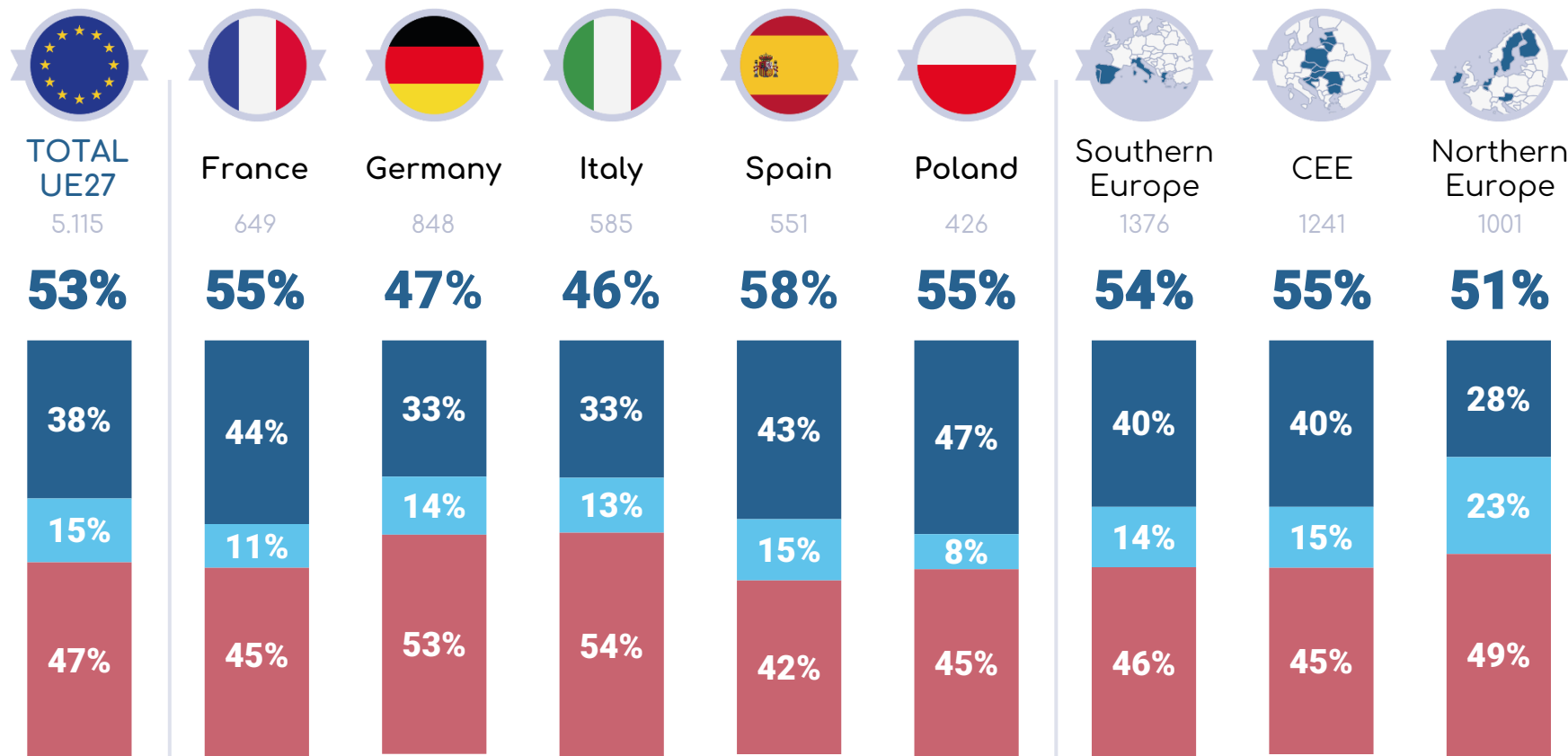
Base:

Agree to impose Eu content

I agree

a higher quota of European content should be imposed

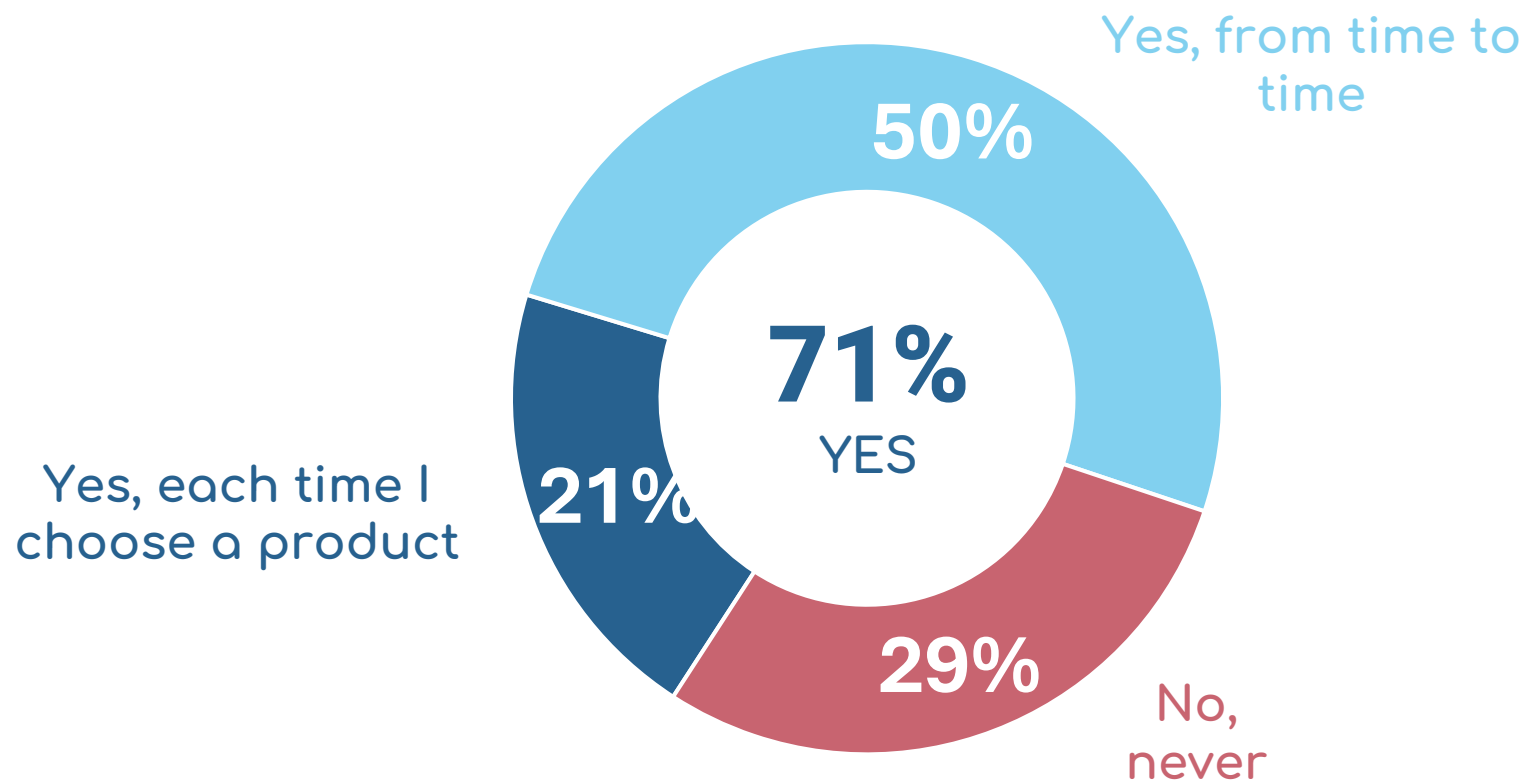
I disagree, there should be no impositions





Consumer Attention to Sustainability in purchasing decisions

All respondents: 5.115





Consumer Attention to Sustainability in purchasing decisions

All respondents: 5.115

Split according to geographical areas










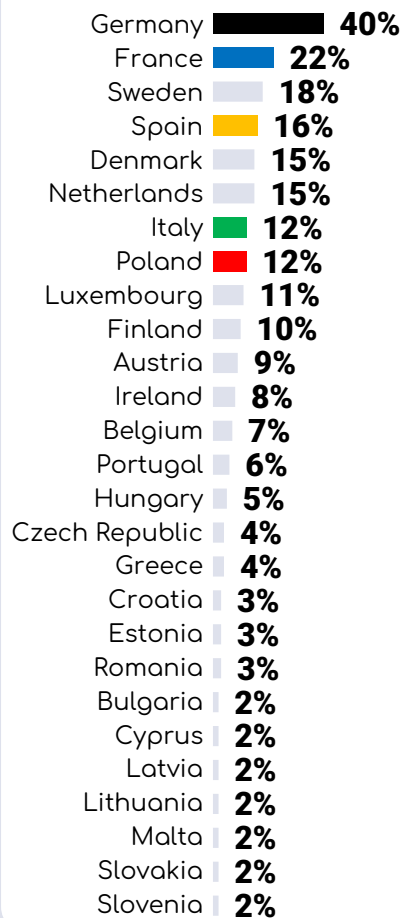
| |  UE27 5.115 |  France 649 |  Germany 848 |  Italy 585 |  Spain 551 |  Poland 426 |  Southern Europe 1376 |  CEE 1241 |  Northern Europe 1001 |
|-----------------------------------|---|--|---|---|---|--|--|--|--|
| TOTAL Yes | 71% | 64% | 69% | 76% | 73% | 70% | 75% | 73% | 69% |
| Yes, each time I choose a product | 21% | 12% | 19% | 23% | 27% | 21% | 25% | 23% | 18% |
| Yes, from time to time | 50% | 51% | 50% | 53% | 46% | 49% | 50% | 50% | 51% |
| No, never | 29% | 36% | 31% | 24% | 27% | 30% | 25% | 27% | 31% |



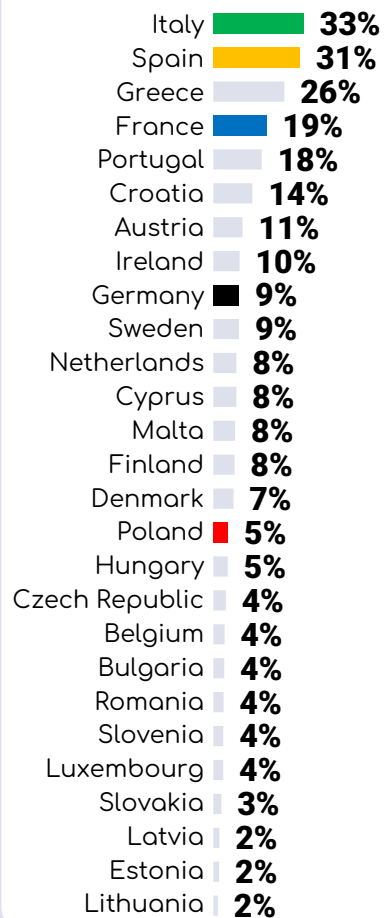
Image & Attractivity of the European countries

All respondents: 5.115

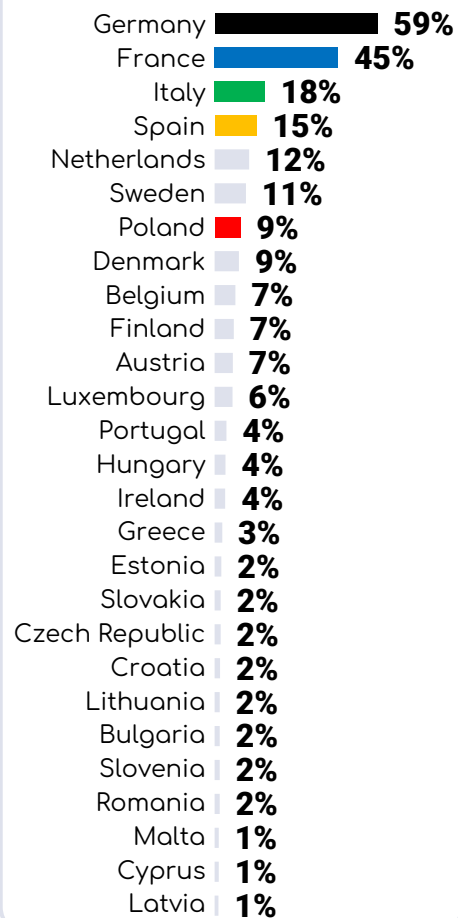
are the most dynamic economically



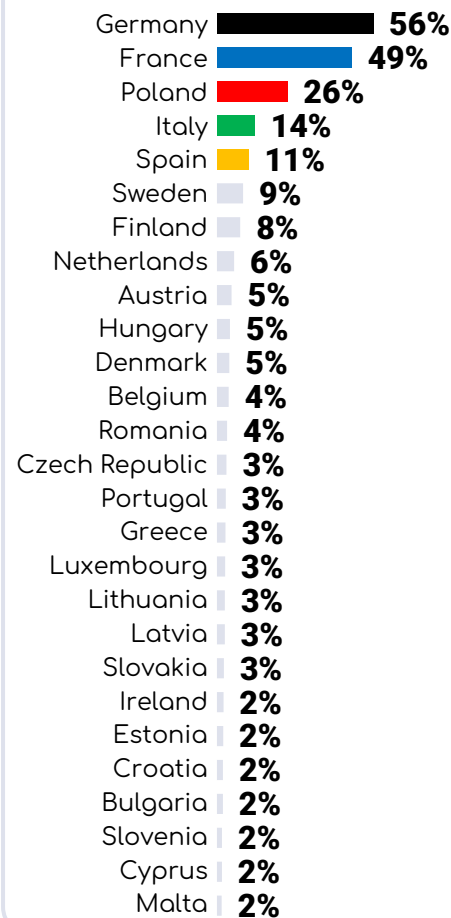
are worth visiting for holidays, tourism



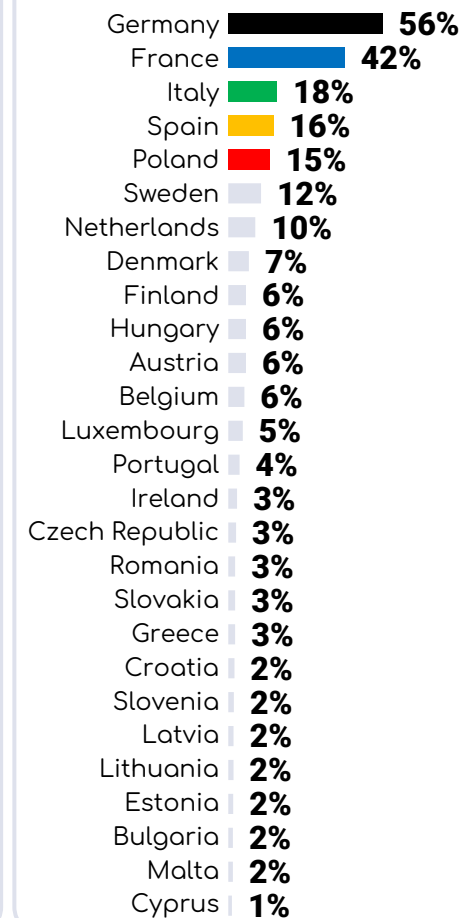
are leading countries for the EU development



can play a strong role to defend Europe in case of an armed conflict



will be a strong leader in Europe in the next 10 years



The background of the slide is a solid blue color. On the left side, there are several concentric circles in shades of blue, creating a ripple effect. A white horizontal line is positioned to the left of the yellow circle containing the number 4.

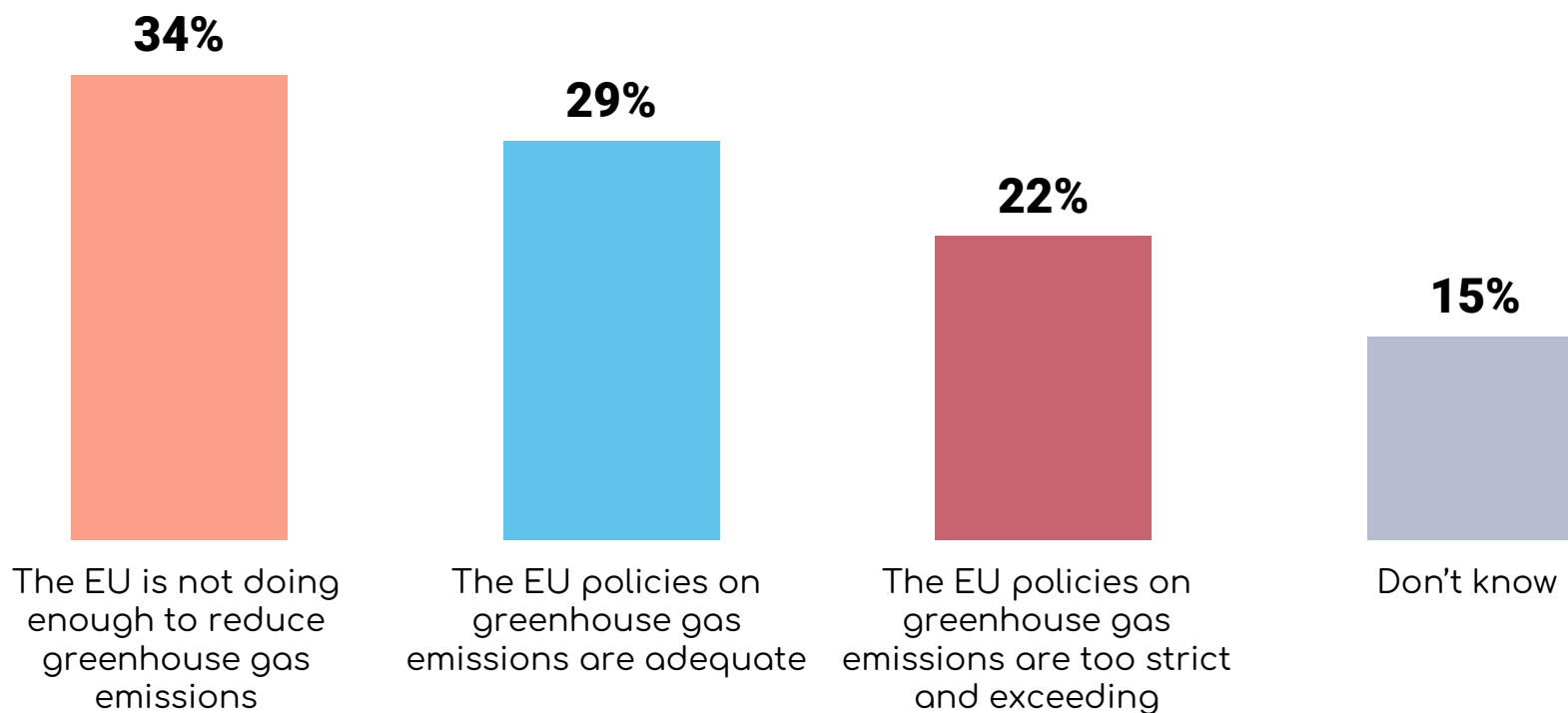
4

Focus on Energy issues



The EU's Policies in Reducing Greenhouse Gas Emissions

All respondents: 5.115





The EU's Policies in Reducing Greenhouse Gas Emissions

All respondents: 5,115

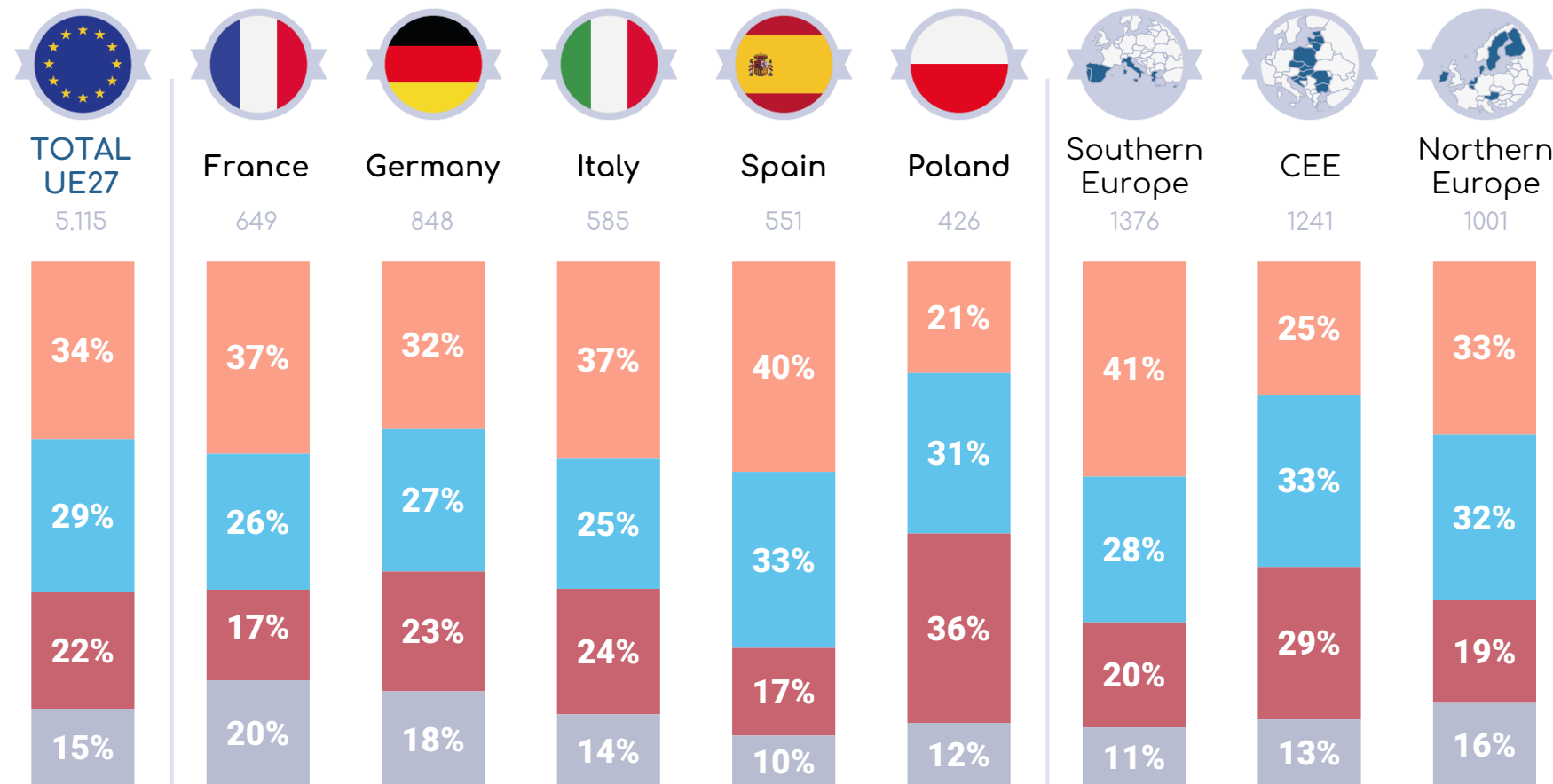
Split according to geographical areas

The EU is not doing enough to reduce greenhouse gas emissions

The EU policies on greenhouse gas emissions are adequate

The EU policies on greenhouse gas emissions are too strict and exceeding

Don't know















The EU's Policies in Reducing Greenhouse Gas Emissions

All respondents: 5,115

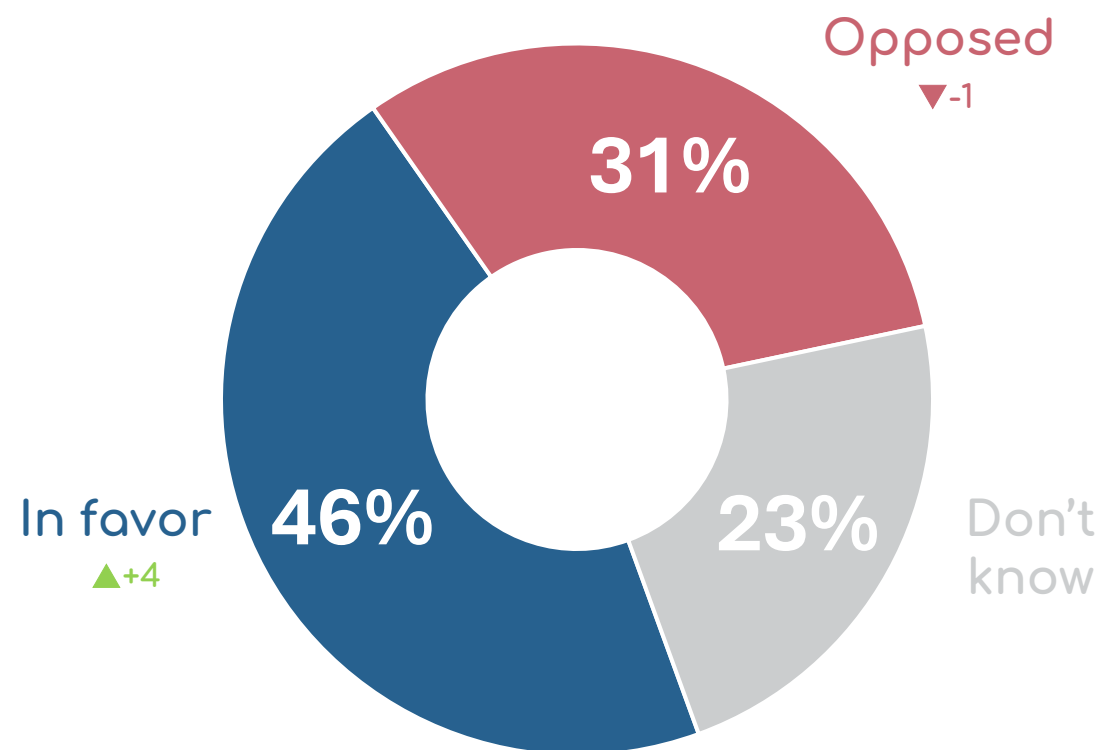
Split according to the vote for the European groups

| |  TOTAL UE27 |  GUE/NGL |  S&D |  Greens |  RE |  EPP |  ECR |  Patriots |  ESN |  Unaffiliated |
|--|--|--|---|---|---|--|--|---|--|---|
| | Base 5,115 | 220 | 827 | 200 | 390 | 738 | 307 | 469 | 186 | 664 |
| The EU is not doing enough to reduce greenhouse gas emissions | 34% | 44% | 45% | 48% | 34% | 33% | 24% | 28% | 19% | 40% |
| The EU policies on greenhouse gas emissions are adequate | 29% | 27% | 34% | 35% | 41% | 34% | 24% | 28% | 20% | 27% |
| The EU policies on greenhouse gas emissions are too strict and exceeding | 22% | 16% | 12% | 9% | 15% | 22% | 42% | 32% | 43% | 23% |
| Don't know | 15% | 13% | 9% | 8% | 10% | 11% | 10% | 12% | 18% | 10% |



Approval of Expanding Nuclear Energy in Europe

All respondents: 5.115













▲ ▼ Evolutions vs October 2024



Approval of Expanding Nuclear Energy in Europe

All respondents: 5,115

Split according to
the vote for the
European groups

| |  TOTAL UE27 |  GUE/NGL |  S&D |  Greens |  RE |  EPP |  ECR |  Patriots |  ESN |  Unaffiliated |
|------------|--|--|---|---|---|--|--|---|--|---|
| Base | 5,115 | 220 | 827 | 200 | 390 | 738 | 307 | 469 | 186 | 664 |
| In favor | 46% | 39% | 41% | 32% | 50% | 60% | 67% | 59% | 62% | 39% |
| Opposed | 31% | 41% | 39% | 54% | 28% | 23% | 18% | 24% | 22% | 43% |
| Don't know | 23% | 20% | 20% | 14% | 22% | 17% | 15% | 17% | 16% | 18% |

The background is a solid dark blue. On the left side, there are several concentric circles in lighter shades of blue, creating a ripple effect. A white horizontal line is positioned to the left of the yellow circle containing the number 5.

5

Misinformation and deregulation



Permeability to misinformation

All respondents: 5.115

%AGREE



55%

46%

44%

38%

35%

33%

30%

30%

28%

77%

Agree with at least 1 assumption
23% NONE OF THEM

3.4

Agree on average with 3.4 assumptions / 9

33%

Agree with a majority of assumptions (5 or more)

8%

Agree with all 9 assumptions










Strongly agree Rather agree Rather disagree Strongly disagree Don't know



Permeability to misinformation

All respondents: 5.115

Split according to geographical areas











| |  UE27 5.115 |  France 649 |  Germany 848 |  Italy 585 |  Spain 551 |  Poland 426 |  Southern Europe 1376 |  CEE 1241 |  Northern Europe 1001 |
|--|---|--|---|---|---|--|--|--|--|
| Agree with at least 1 assumption | 77% | 67% | 82% | 70% | 77% | 85% | 75% | 85% | 74% |
| Agree with most assumptions (5 or more) | 33% | 23% | 39% | 26% | 29% | 35% | 29% | 41% | 29% |
| Agree with all 9 assumptions | 8% | 6% | 10% | 6% | 7% | 7% | 6% | 11% | 6% |
| Average/9 | 3,4 | 2,6 | 3,7 | 2,9 | 3,2 | 3,7 | 3,2 | 4,1 | 3,1 |



Permeability to misinformation

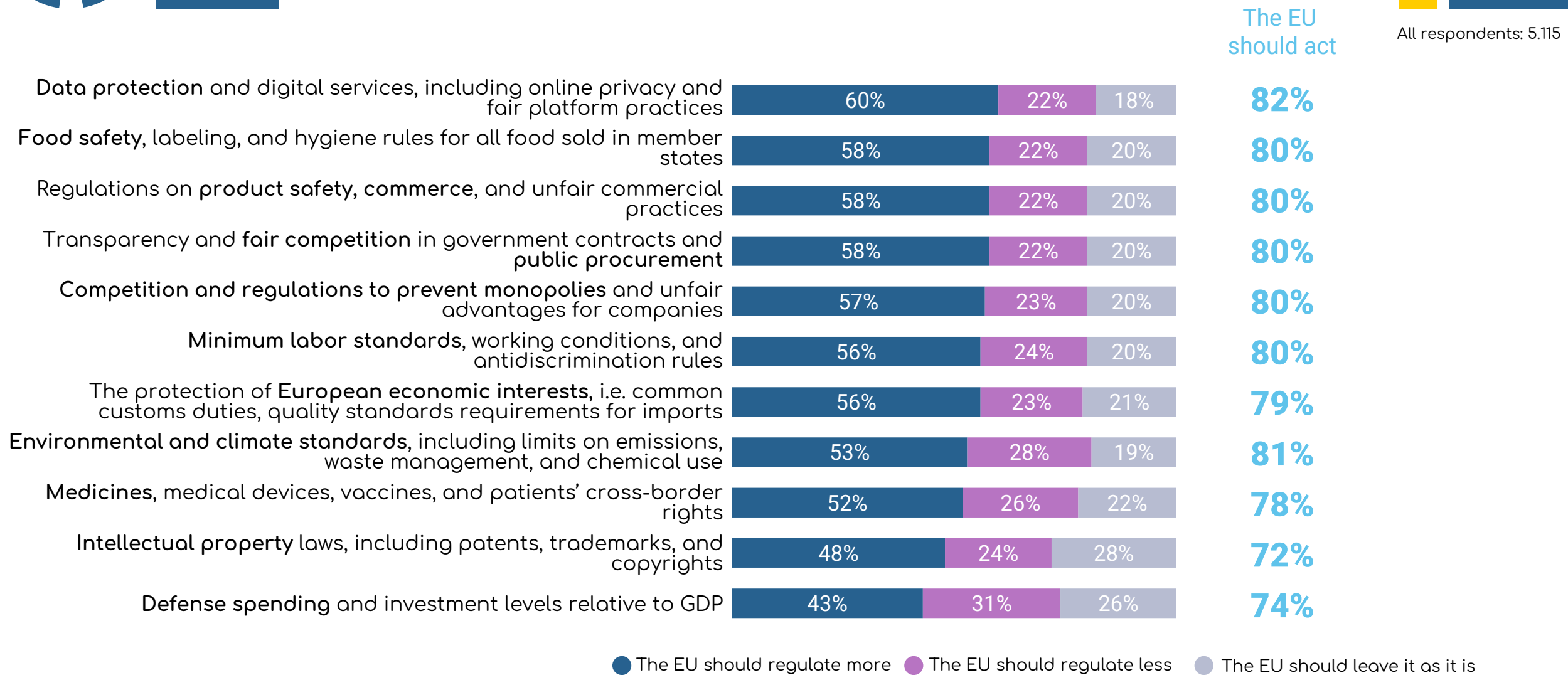
All respondents: 5.115

Split according to the vote for the European groups

| |  UE27 5.115 |  GUE/NGL 220 |  S&D 827 |  Greens 200 |  RE 390 |  EPP 738 |  ECR 307 |  Patriots 469 |  ESN 186 |  Unaffiliated 664 |
|--|---|---|---|--|--|---|---|--|---|--|
| Agree with at least 1 assumption | 77% | 75% | 66% | 72% | 67% | 81% | 90% | 93% | 93% | 84% |
| Agree with most assumptions (5 or more) | 33% | 31% | 24% | 27% | 19% | 28% | 46% | 46% | 72% | 44% |
| Agree with all 9 assumptions | 8% | 6% | 6% | 4% | 5% | 7% | 9% | 12% | 22% | 11% |
| Average/9 | 3,4 | 3,1 | 2,6 | 2,7 | 2,5 | 3,2 | 4,4 | 4,7 | 5,8 | 4,2 |



Regulation VS Deregulation





Regulation VS Deregulation

All respondents: 5.115

Split according to the vote for the European groups

% The EU should regulate more











| |  UE27 |  GUE/NGL |  S&D |  Greens |  RE |  EPP |  ECR |  Patriots |  ESN |  Unaffiliated |
|---|--|--|--|---|---|--|--|---|--|---|
| | 5.115 | 220 | 827 | 200 | 390 | 738 | 307 | 469 | 186 | 664 |
| Data protection and digital services... | 60% | 63% | 70% | 57% | 63% | 64% | 52% | 56% | 40% | 59% |
| Food safety, labeling, and hygiene rules ... | 58% | 56% | 67% | 55% | 56% | 58% | 49% | 56% | 44% | 61% |
| Product safety, e-commerce, and unfair commercial practices | 58% | 64% | 66% | 63% | 62% | 58% | 49% | 55% | 37% | 56% |
| Transparency and fair competition /public procurement | 58% | 60% | 67% | 55% | 54% | 57% | 50% | 51% | 40% | 62% |
| Prevent monopolies and unfair advantages for companies | 57% | 57% | 67% | 56% | 56% | 57% | 49% | 50% | 43% | 59% |
| Minimum labor standards, working conditions, ... | 56% | 64% | 68% | 53% | 57% | 54% | 44% | 49% | 36% | 60% |
| The protection of European economic interests | 56% | 49% | 68% | 58% | 63% | 59% | 47% | 52% | 44% | 52% |
| Environmental and climate standards | 53% | 61% | 71% | 64% | 55% | 51% | 36% | 41% | 29% | 54% |
| Medicines, medical devices, vaccines, ... | 52% | 48% | 62% | 51% | 54% | 50% | 46% | 51% | 35% | 54% |
| Intellectual property laws... | 48% | 47% | 56% | 47% | 47% | 50% | 42% | 47% | 33% | 47% |
| Defense spending and investment levels relative to GDP | 43% | 36% | 50% | 42% | 52% | 49% | 37% | 37% | 32% | 42% |



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Polling Europe is an innovative research firm born from the esteemed collaboration of SWG and OpinionWay, two premier market and social research entities from Italy and France. Located in the heart of Brussels, Polling Europe specializes in conducting comprehensive public affairs surveys and opinion polls, delving into the nuanced landscape of EU public opinion. Our expertise spans both ad hoc research endeavors and meticulously crafted multi-client surveys, providing quick and cost-effective insights into European public opinion. With a commitment to excellence and a dedication to unveiling Europeans dynamic socio-political climate, Polling Europe will be a trusted partner in answering your questions regarding the future of Europe.

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