

THE EUROPEAN PROJECT: 2019 EUROPEAN ELECTIONS



GAME CHANGERS



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As you may know, 62 years ago, on 25 March 1957, the six founding Member States of the European Union (Belgium, France, Italy, Luxembourg, the Netherlands and West Germany) signed the Treaty of Rome, establishing the European Economic Community, the legal basis of today's European Union which covers 28 countries in economic and political cooperation through a series of treaties, institutions, the single market, free movement of goods, services, people and money.

This survey was conducted in 28 countries around the world via the Ipsos online panel system, including ten countries within Europe (Belgium, France, Germany, Great Britain, Hungary, Italy, Poland, Serbia, Spain and Sweden). Throughout these slides, we refer to these countries as either the EU10 or the EU9, with the latter in recognition that Serbia is not a member of the European Union.



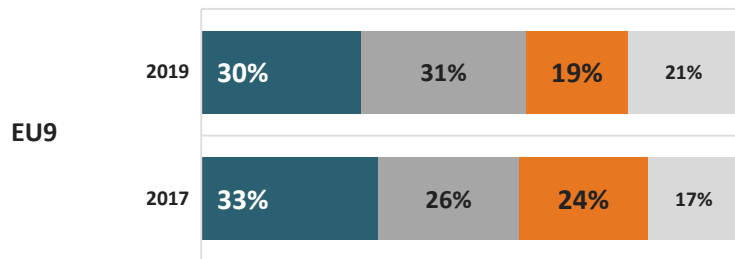
REFLECTIONS ON THE PAST

GAME CHANGERS

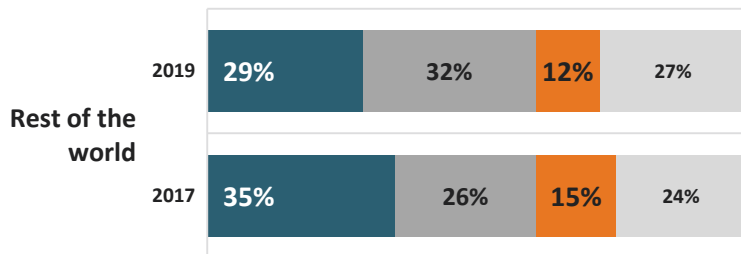


3 IN 10 WORLDWIDE CONSIDER THE EUROPEAN PROJECT TO HAVE BEEN A SUCCESS – MORE ON THE FENCE THAN IN 2017

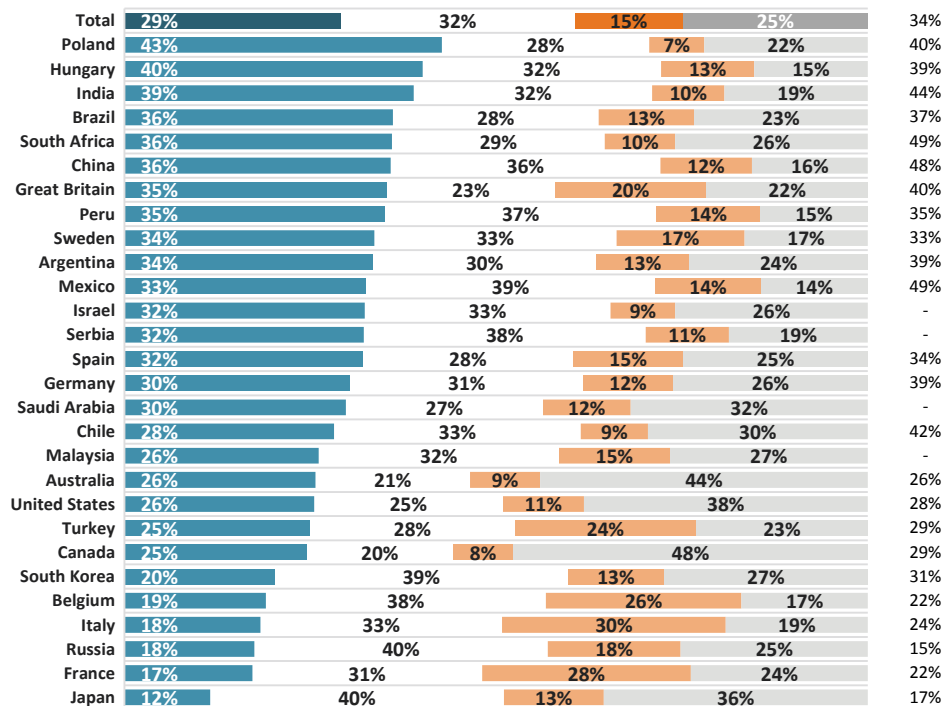
Taking everything into account, do you think this European project over the last 60 years has had...?



■ More successes than failures
■ The same amount of failures as successes
■ More failures than successes
■ Don't know



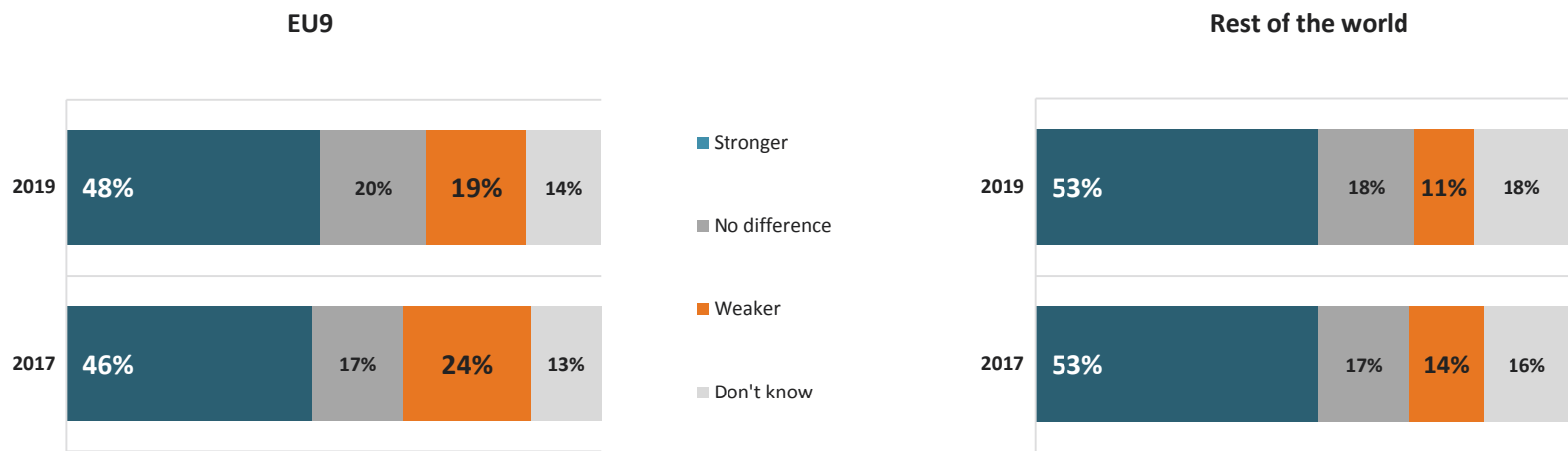
**More successes
in 2017**



■ More successes than failures
■ More failures than successes
■ The same amount of failures as successes
■ Don't know

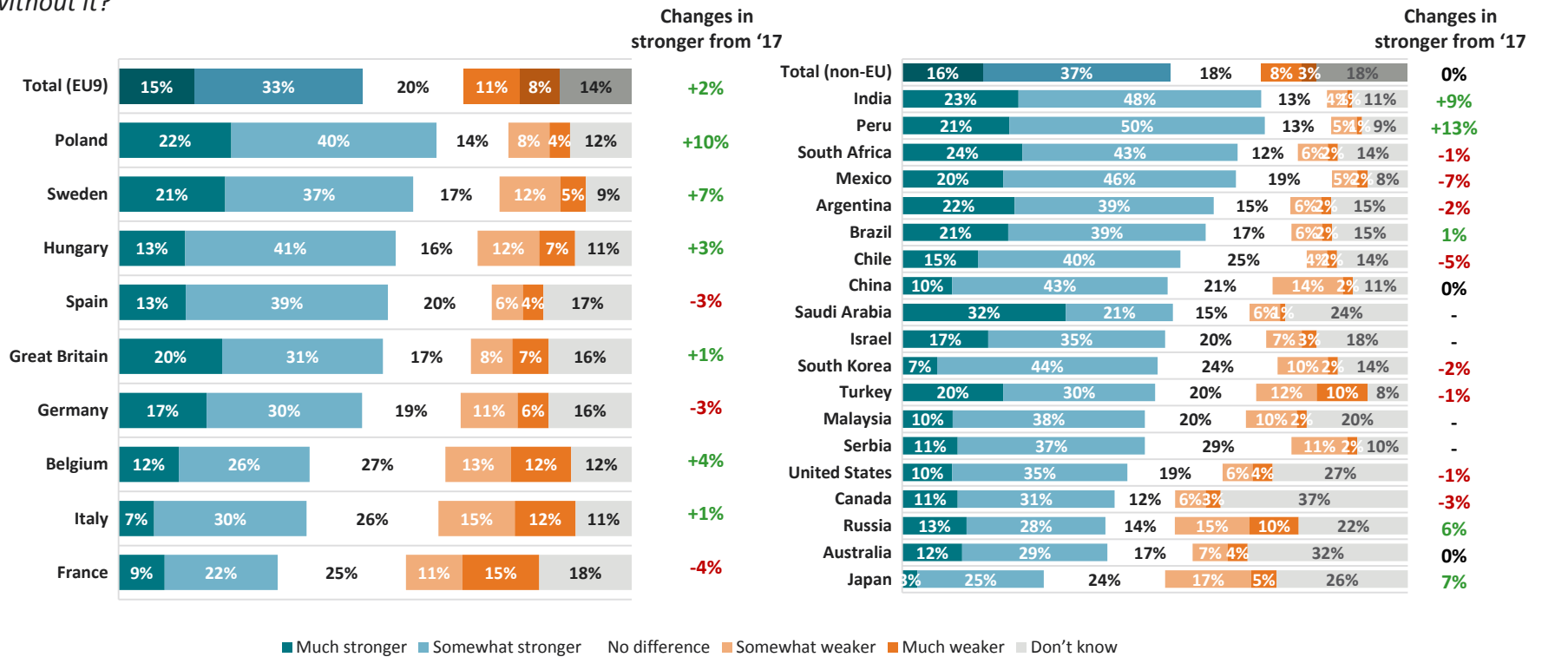
HALF WORLDWIDE THINK THE EUROPEAN PROJECT HAS MADE EUROPE STRONGER THAN IT WOULD HAVE BEEN OTHERWISE; NON-EU COUNTRIES SLIGHTLY MORE POSITIVE THAN EU9

Taking everything into account, do you think this European project has made Europe stronger or weaker today than it would have been without it?



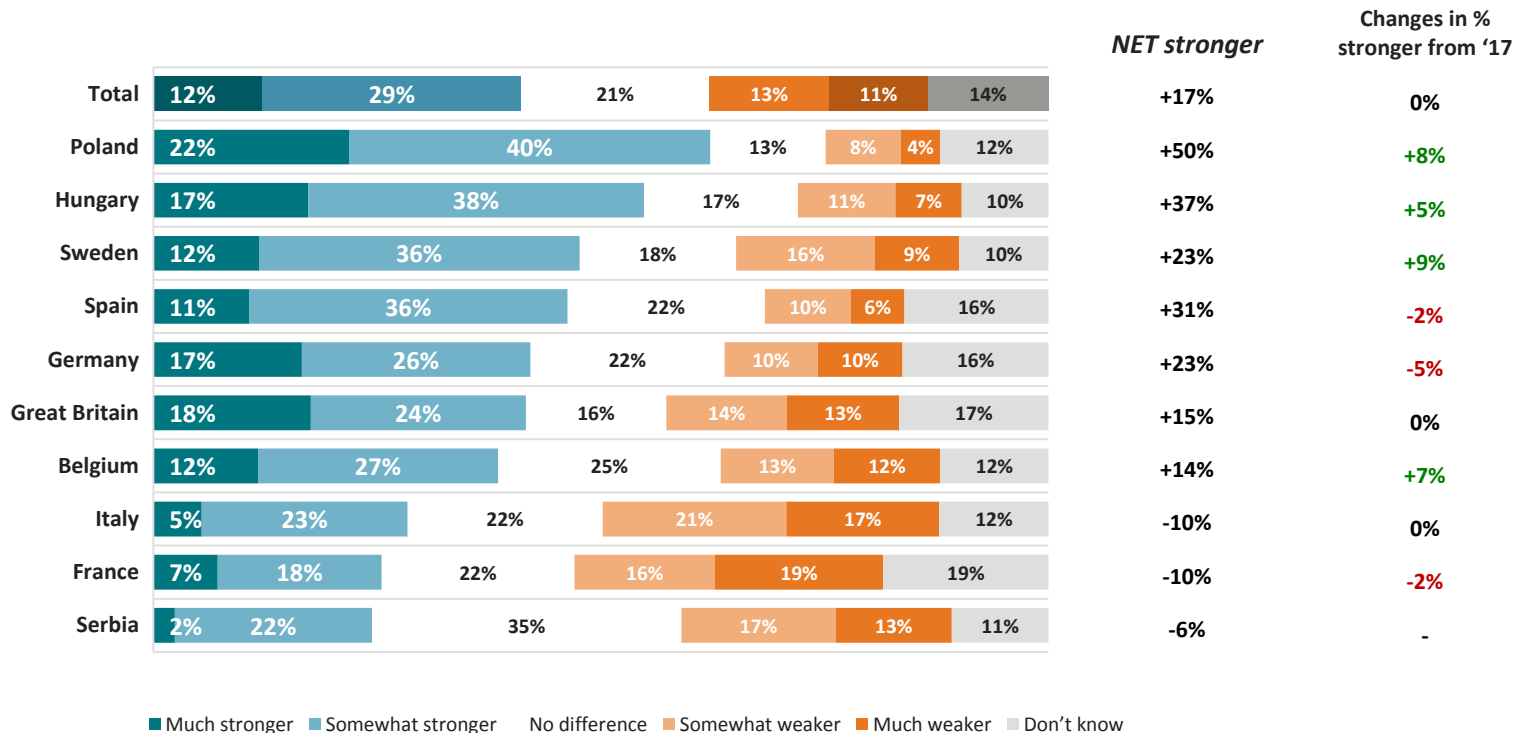
THE EUROPEAN PROJECT IS SEEN MOST POSITIVELY IN INDIA, SOUTH AFRICA AND ACROSS LATIN AMERICA; IN EU POLAND AND SWEDEN GROWN MORE POSITIVE, WHILE FRANCE LESS SO

Taking everything into account, do you think this European project has made Europe stronger or weaker today than it would have been without it?



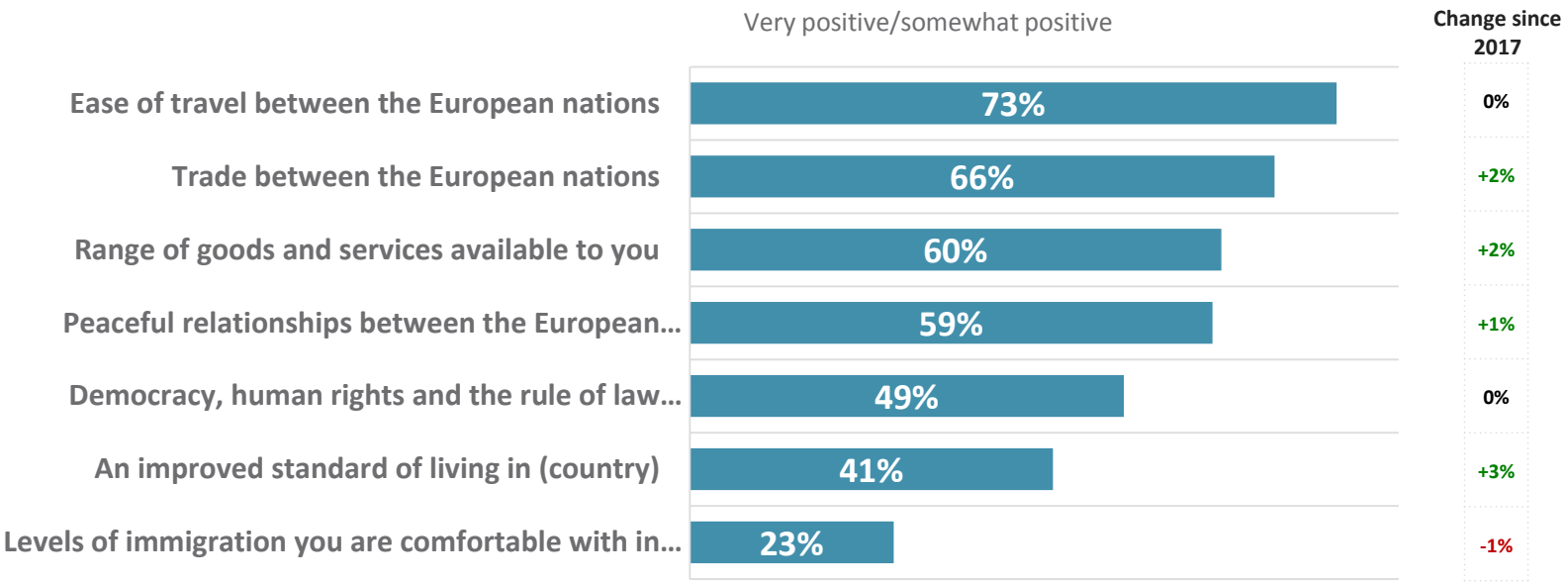
WITHIN EUROPE, POLES AND HUNGARIANS MOST POSITIVE ABOUT THE EUROPEAN PROJECT HAVING STRENGTHENED THEIR COUNTRY, WHILE THE ITALIANS, FRENCH AND SERBIANS ARE LEAST POSITIVE

And taking everything into account, do you think your country is stronger or weaker today because of this European project than it would have been without it?



THE EUROPEAN PROJECT IS OFTEN SEEN AS HAVING CONTRIBUTED IN A POSITIVE WAY TO FACILITATING TRAVEL AND TRADE BETWEEN EUROPEAN COUNTRIES – BUT LESS SO ON IMMIGRATION

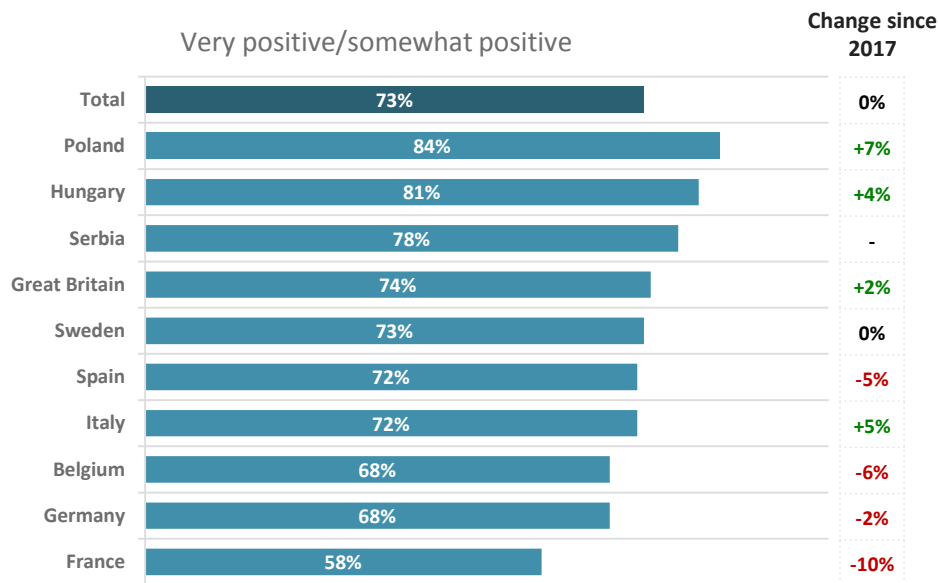
To what extent do you think this European project over the last 60 years has made a positive or negative contribution to...



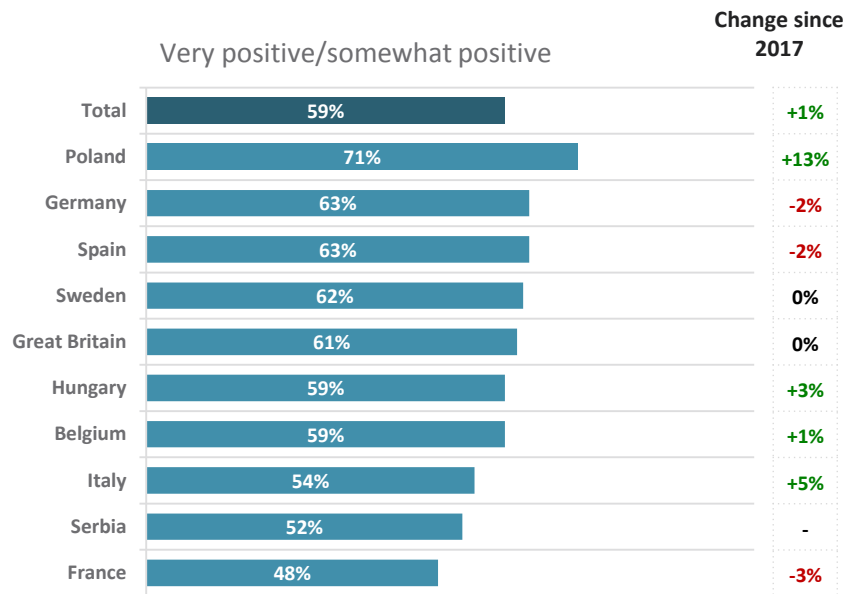
STRONG CONSENSUS AMONGST EUROPEANS THAT THE EU HAS FACILITATED EASE OF TRAVEL BETWEEN EUROPEAN NATIONS; MAJORITY IN MOST COUNTRIES ALSO THINK IT HAS IMPROVED PEACEFUL RELATIONS.

To what extent do you think this European project over the last 60 years has made a positive or negative contribution to...

ease of travel between the European nations?



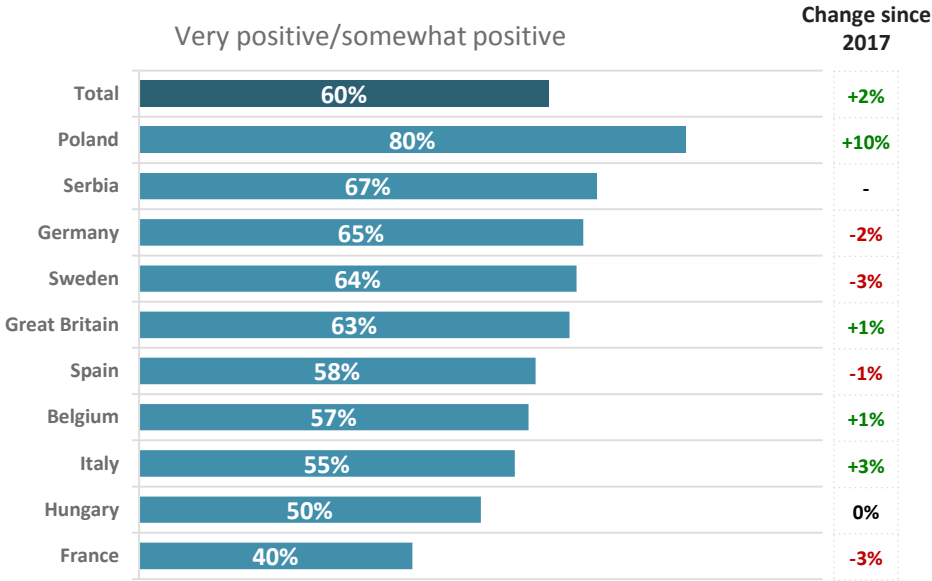
peaceful relationships between the European nations?



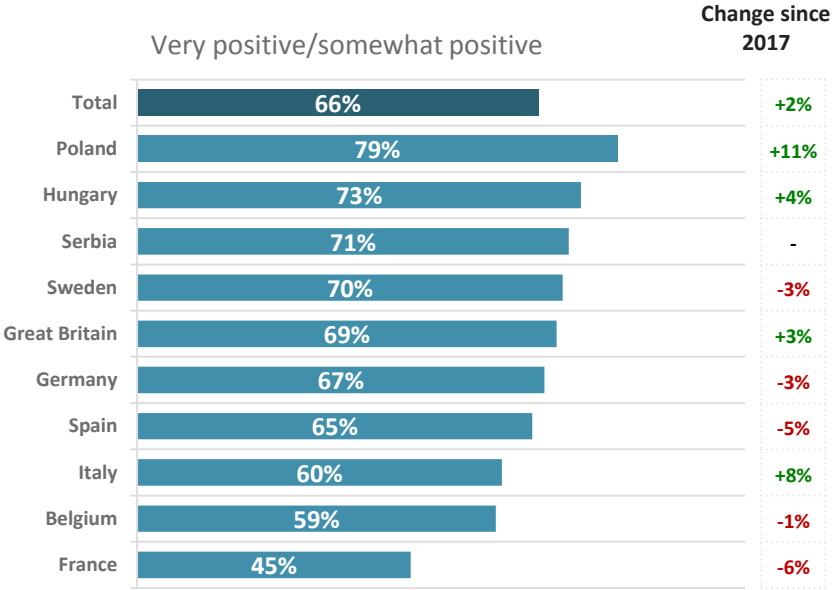
MAJORITY THINK EUROPEAN PROJECT HAS IMPROVED TRADE AND THE RANGE OF GOODS AND SERVICES OPEN TO THEM. POLES HAVE BECOME INCREASINGLY POSITIVE SINCE 2017, BUT FRENCH LESS CONVINCED OF THE TRADE BENEFITS

To what extent do you think this European project over the last 60 years has made a positive or negative contribution to...

the range of goods and services available to you?



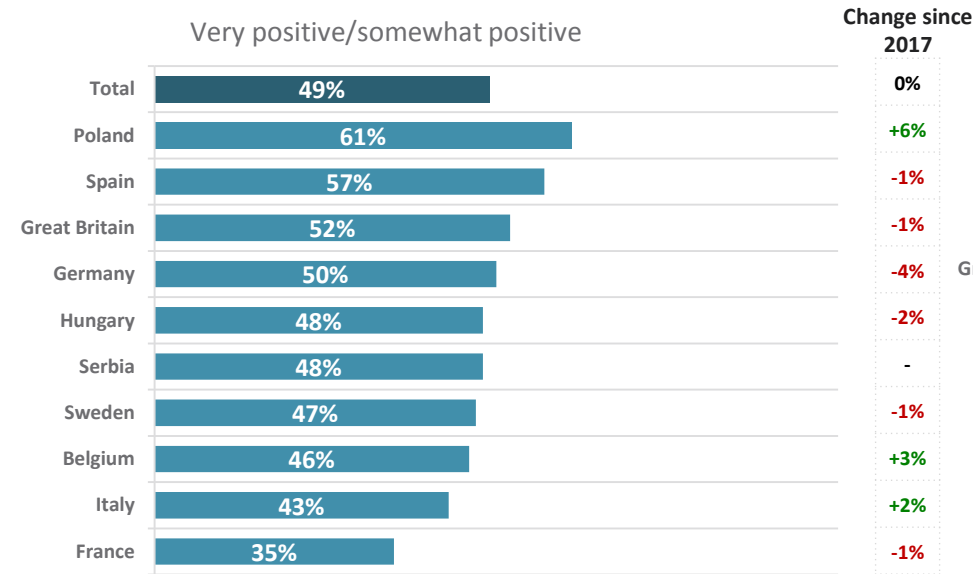
trade between the European countries?



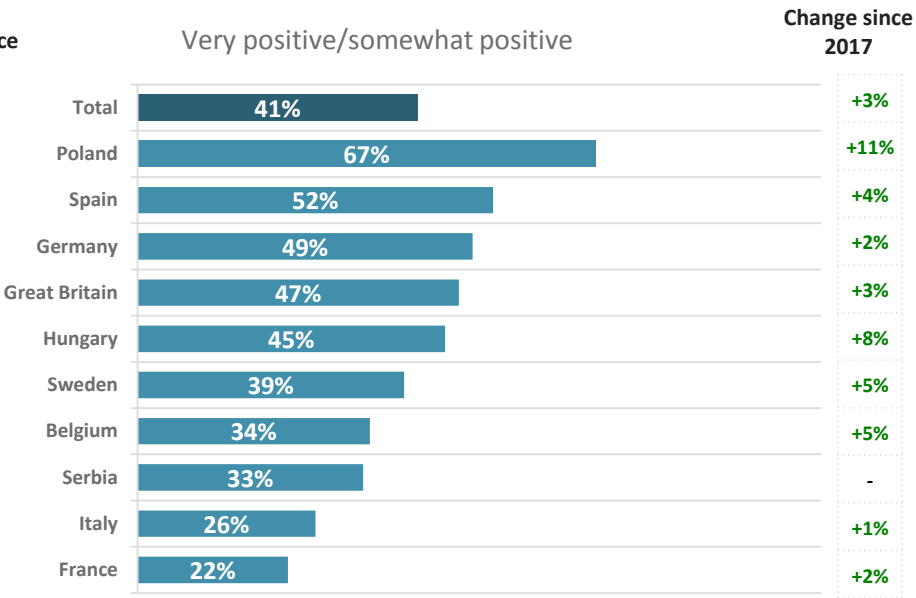
HALF CONSIDER THE EUROPEAN PROJECT TO HAVE HAD A POSITIVE IMPACT ON DEMOCRACY, HUMAN RIGHTS, AND THE RULE OF LAW - PARTICULARLY IN POLAND. BUT MIXED FEELINGS AMONG EUROPEANS ON IMPACT OF EUROPEAN PROJECT ON STANDARD OF LIVING IN THEIR COUNTRY

To what extent do you think this European project over the last 60 years has made a positive or negative contribution to...

democracy, human rights, and the rule of law across Europe in your country?



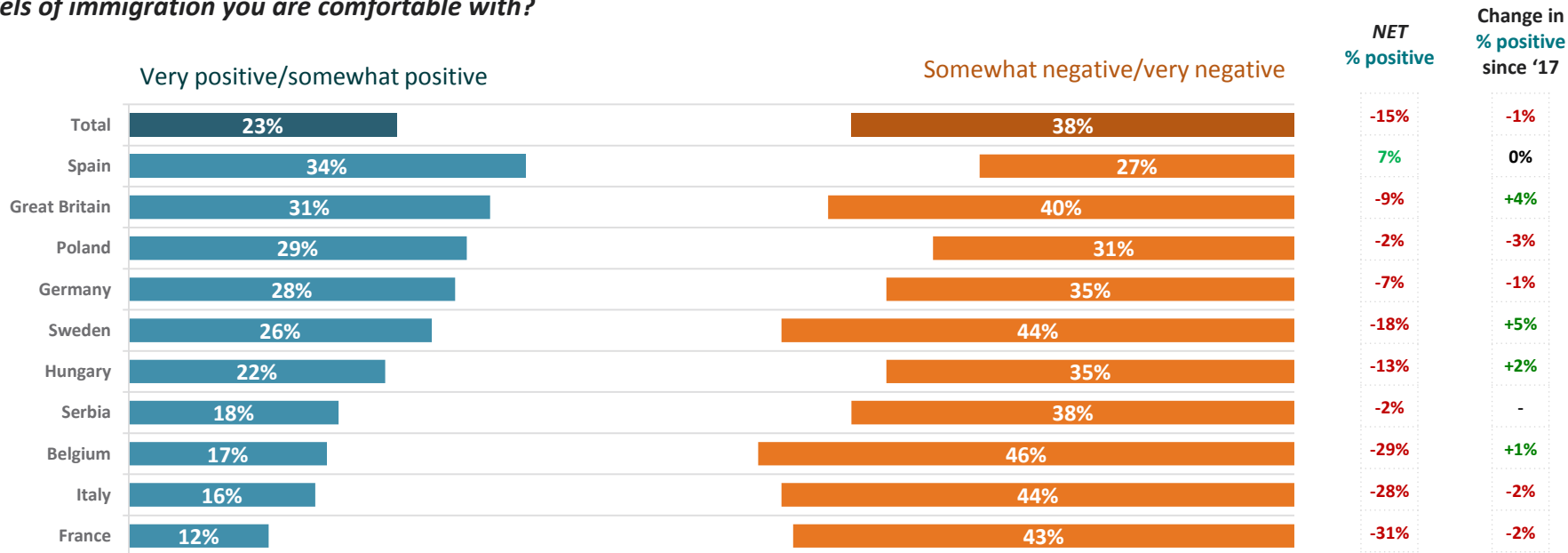
an improved standard of living in your country?



FRENCH, ITALIANS AND BELGIANS ARE MOST NEGATIVE ABOUT IMPACT OF EUROPEAN PROJECT ON LEVELS OF IMMIGRATION; SPANISH MOST POSITIVE

To what extent do you think this European project over the last 60 years has made a positive or negative contribution to...

levels of immigration you are comfortable with?



FRANCE IS GENERALLY THE LEAST POSITIVE ABOUT THE CONTRIBUTION MADE BY THE EUROPEAN PROJECT, FOLLOWED BY BELGIUM AND ITALY, WHILE POLAND IS THE MOST POSITIVE; PEOPLE ARE MOST UNHAPPY WITH CONTRIBUTION TO LEVELS OF IMMIGRATION AND STANDARD OF LIVING

To what extent do you think this European project over the last 60 years has made a positive or negative contribution to...

	Total	Belgium	Britain	France	Germany	Hungary	Italy	Poland	Serbia	Spain	Sweden
Ease of travel between the European nations	73%	68%	74%	58%	68%	81%	72%	84%	78%	72%	73%
Trade between the European nations	66%	59%	69%	45%	67%	73%	60%	79%	71%	65%	70%
Range of goods and services available to you	60%	57%	63%	40%	65%	50%	55%	80%	67%	58%	64%
Peaceful relationships between the European nations	59%	59%	61%	48%	63%	59%	54%	71%	52%	63%	62%
Democracy, human rights and rule of law across Europe	49%	46%	52%	35%	50%	48%	43%	61%	48%	57%	47%
An improved standard of living in (country)	41%	34%	47%	22%	49%	45%	26%	67%	33%	52%	39%
Levels of immigration you are comfortable with in (country)	23%	17%	31%	12%	28%	22%	16%	29%	18%	34%	18%



THE EUROPEAN UNION TODAY

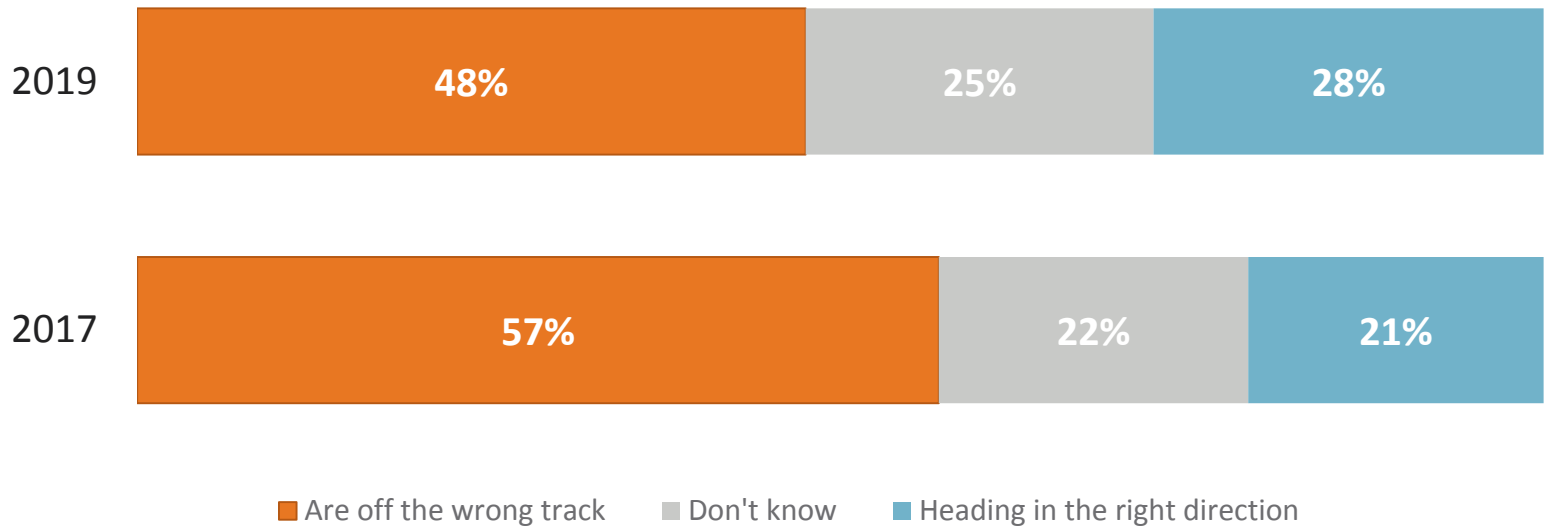
GAME CHANGERS



FEWER EUROPEANS THINK THAT THINGS ACROSS THE EU ARE HEADING ON THE WRONG TRACK THAN IN 2017 – BUT STILL AROUND HALF ARE NEGATIVE

Generally speaking, would you say things across the European Union are heading in the right direction or are they off on the wrong track?

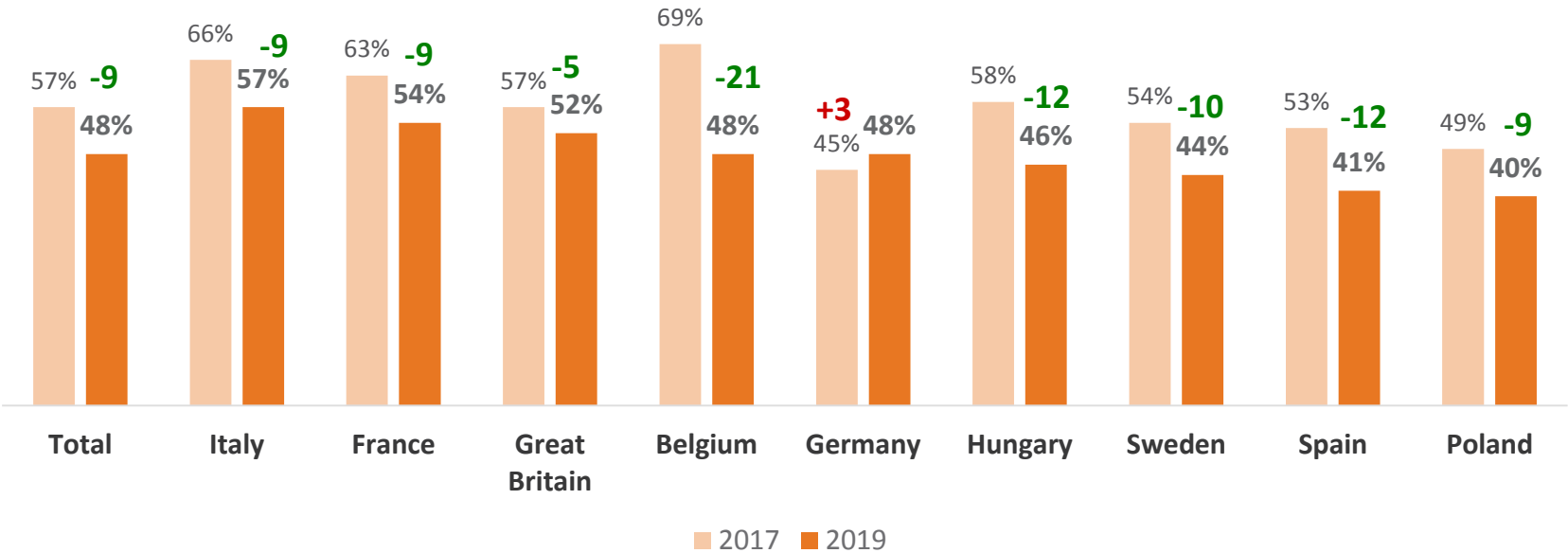
Average across EU9



ITALIANS, FRENCH AND BRITISH MOST PESSIMISTIC ABOUT WAY THINGS ARE GOING ACROSS THE EU. MOST COUNTRIES THOUGH ARE LESS NEGATIVE THAN TWO YEARS AGO, ESPECIALLY BELGIUM, HUNGARY AND SPAIN

Generally speaking, would you say things across the European Union are heading in the right direction or are they off on the wrong track?

% Are off on the wrong track



ACROSS EUROPE PEOPLE ON AVERAGE MORE SATISFIED WITH DEMOCRACY IN THE EU THAN IN THEIR OWN NATIONS; THEY FEEL LIKE THEY KNOW MORE ABOUT THE EU'S POTENTIAL ADVANTAGES THAN ITS DISADVANTAGES

On the whole, to what extent would you say you are satisfied or dissatisfied with the following?

**The way democracy works
in the European Union**



**The way democracy works
in your country**



Very satisfied Fairly satisfied Neither/nor Fairly dissatisfied Very dissatisfied

And thinking about [COUNTRY] membership of the EU, how much, if anything, would you say you know about it's potential...?

Advantages



Disadvantages

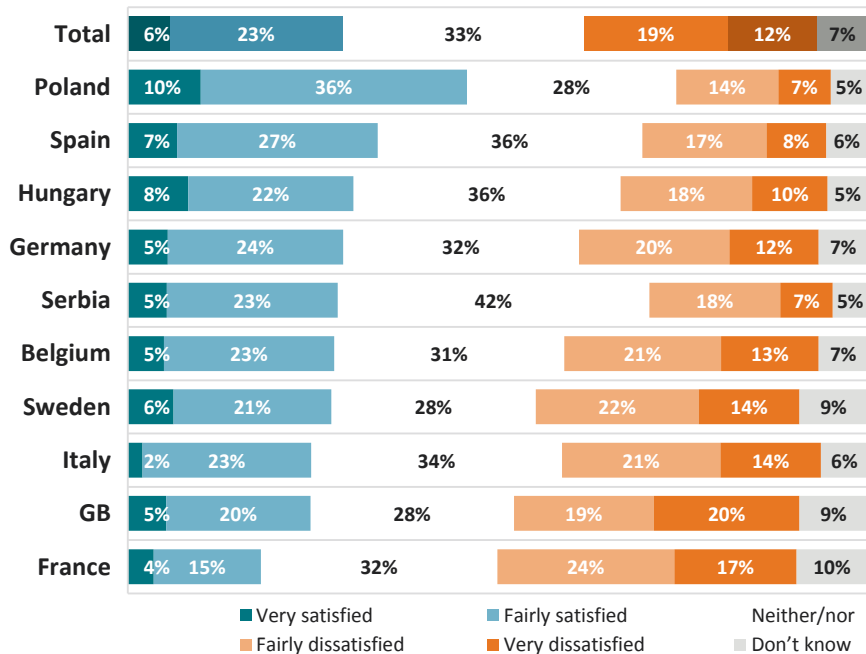


A great deal A fair amount Don't know Not very much Nothing

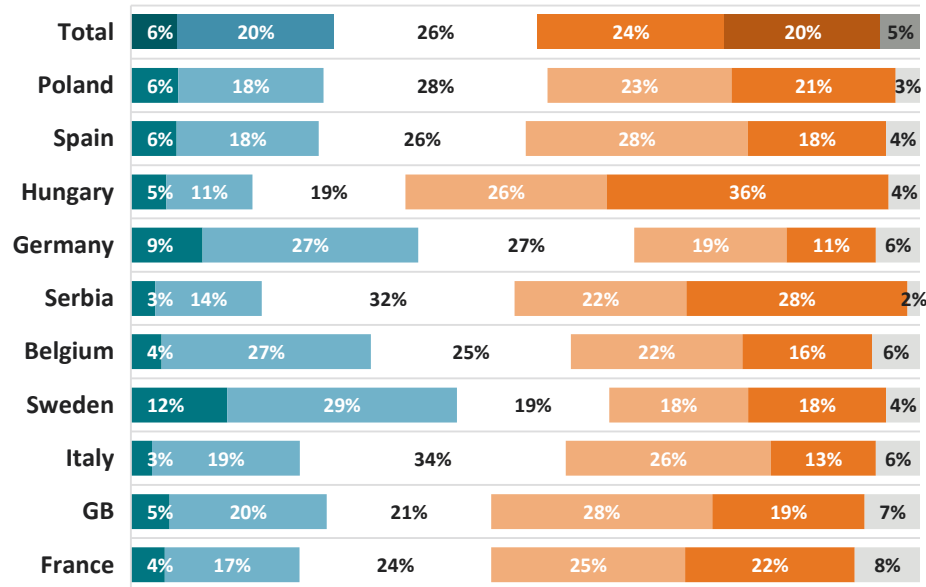
SWEDES AND GERMANS ARE HAPPIER WITH DEMOCRACY AT HOME, BELGIANS AND ITALIANS CRITICAL OF EACH EQUALLY, WHILE EVERYONE ELSE IS MORE DISSATISFIED WITH THEIR NATIONAL DEMOCRACY THAN THE EU'S

On the whole, to what extent would you say you are satisfied or dissatisfied with the following?

The way democracy works in the EU



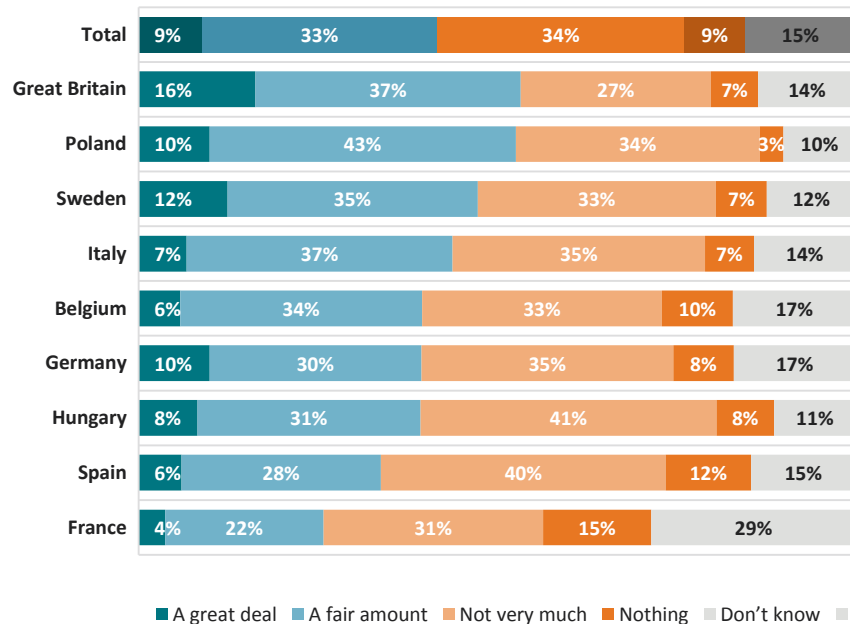
The way democracy works in [COUNTRY]



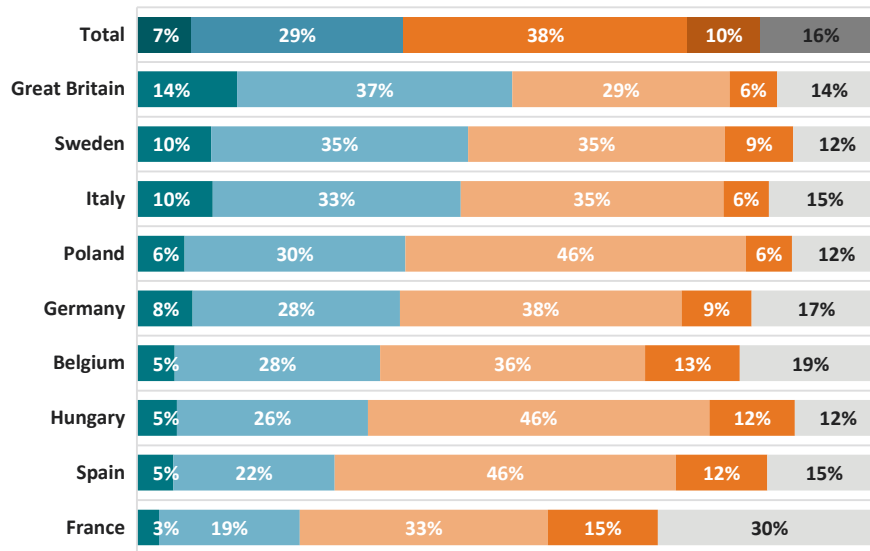
LESS THAN HALF ON AVERAGE SAY THEY KNOW MUCH ABOUT THE EU'S ADVANTAGES. BUT IN SEVERAL COUNTRIES KNOWLEDGE OF ITS DISADVANTAGES IS SLIGHTLY LOWER

And thinking about [COUNTRY] membership of the EU, how much, if anything, would you say you know about it's potential... ?

Advantages

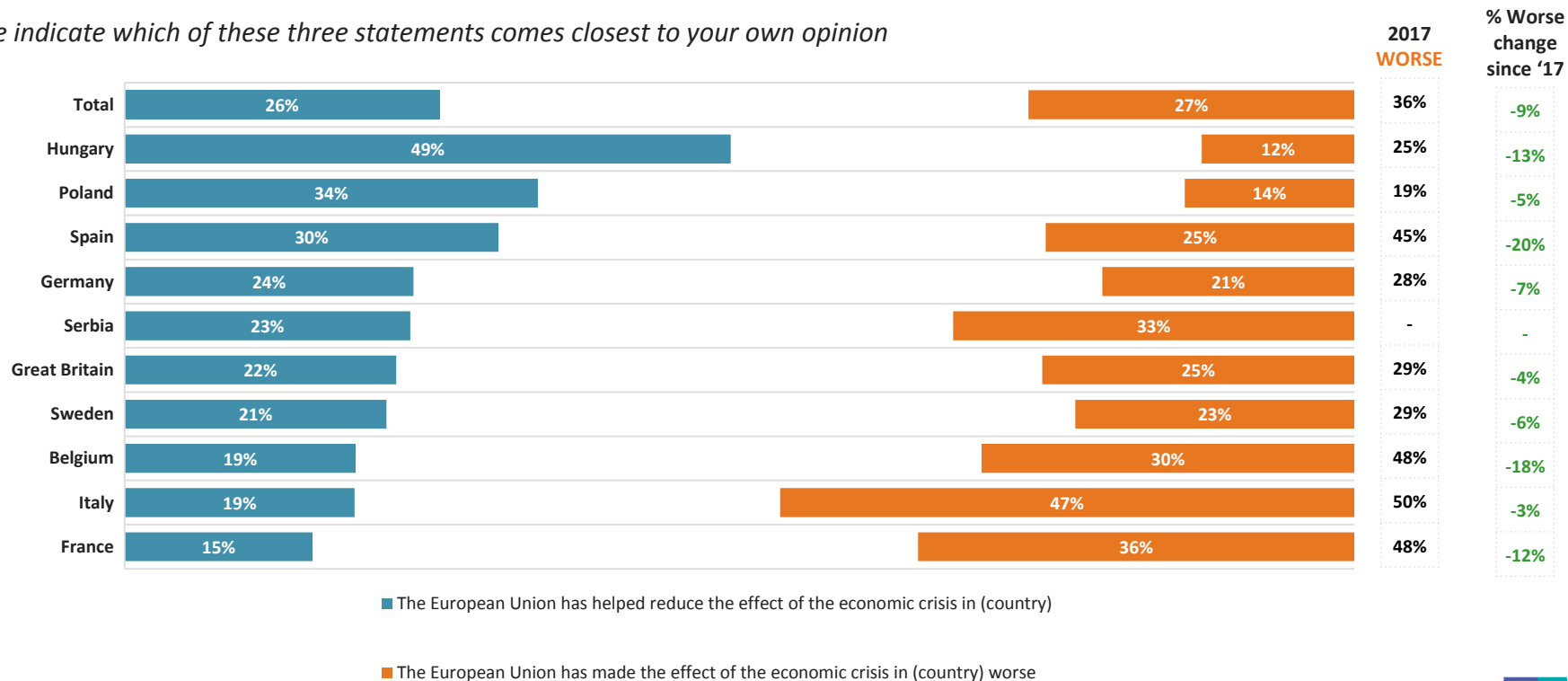


Disadvantages



EUROPEANS ARE LESS NEGATIVE THAN THEY WERE IN 2017 AS TO WHETHER THE EUROPEAN UNION MADE THE EFFECTS OF THE ECONOMIC CRISIS BETTER OR WORSE – BUT ITALIANS, FRENCH AND BELGIANS STILL CRITICAL OVERALL

Please indicate which of these three statements comes closest to your own opinion



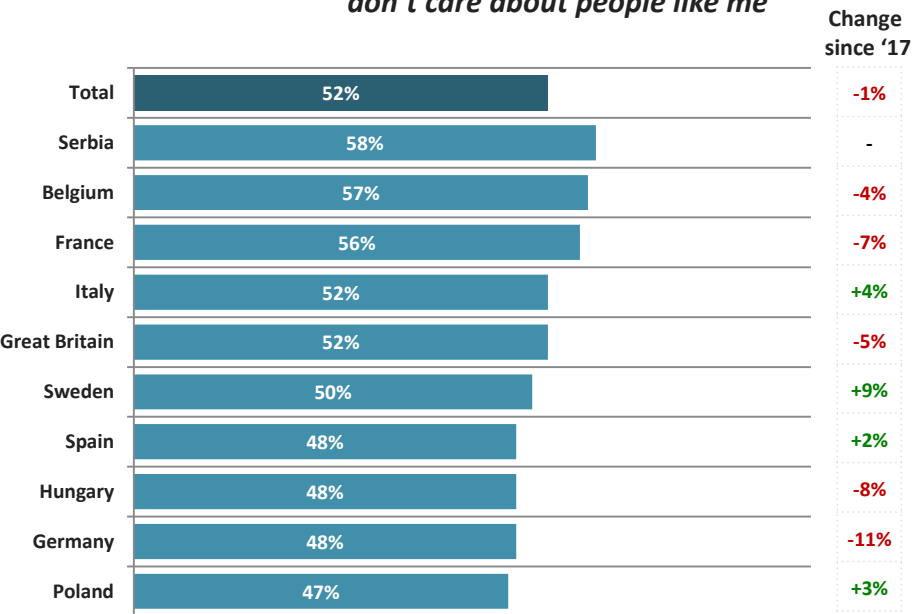
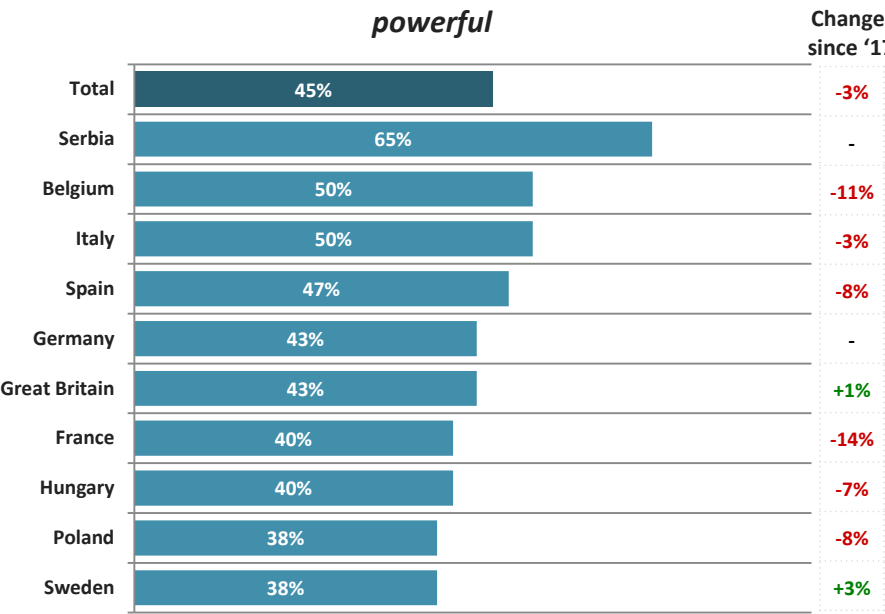
AROUND HALF OF EUROPEANS BELIEVE THE RULES OF THE EU ARE RIGGED TO ADVANTAGE THE RICH AND POWERFUL, AND THAT ITS LEADERS DON'T CARE ABOUT PEOPLE LIKE THEM

To what extent do you agree or disagree that...

The rules of the European Union are rigged to advantage the rich and powerful

“Strongly agree/tend to agree”

The leaders of the European Union don't care about people like me



A photograph of the European Parliament building in Brussels, featuring a series of tall, silver flagpoles in the foreground, each flying a European Union flag. The building's facade is visible in the background, and the scene is partially obscured by a teal-colored graphic overlay on the right side.

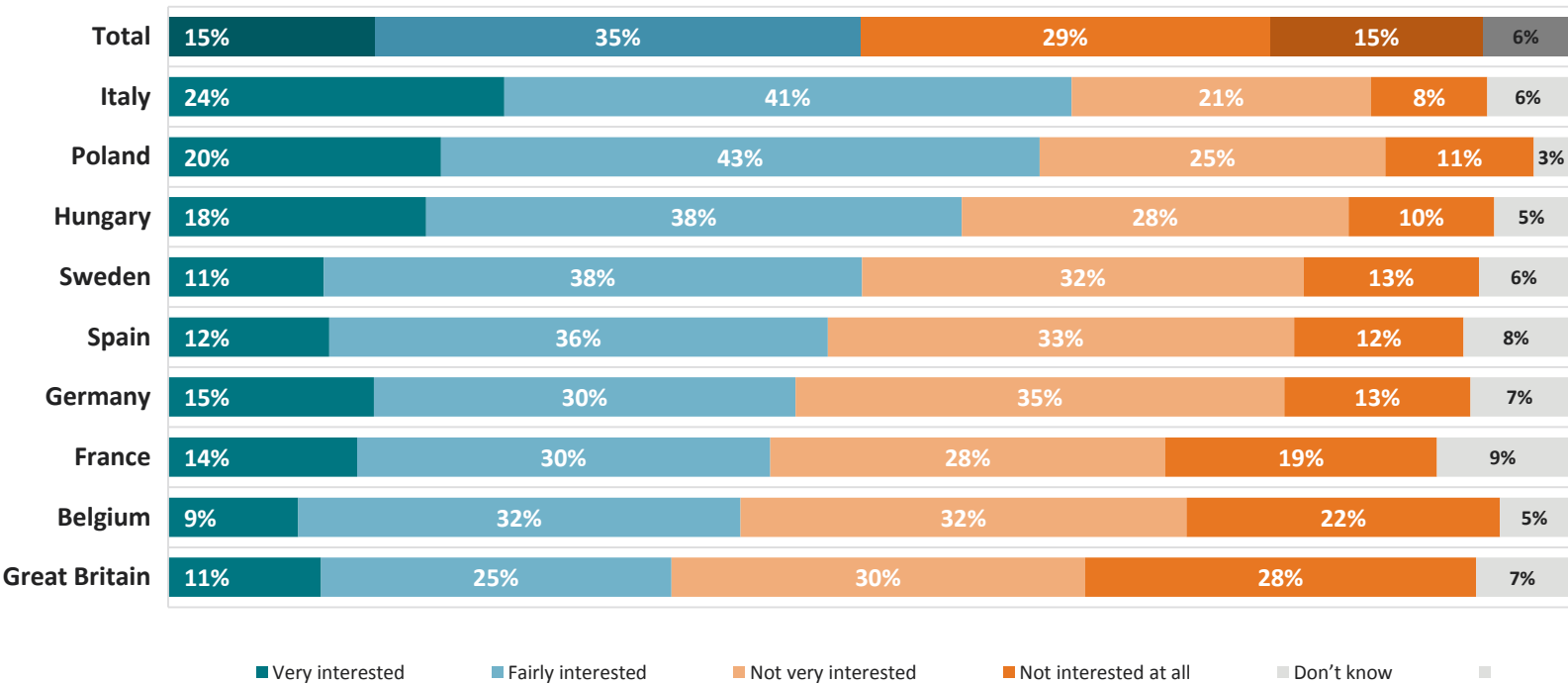
2019 EUROPEAN PARLIAMENT ELECTIONS

GAME CHANGERS



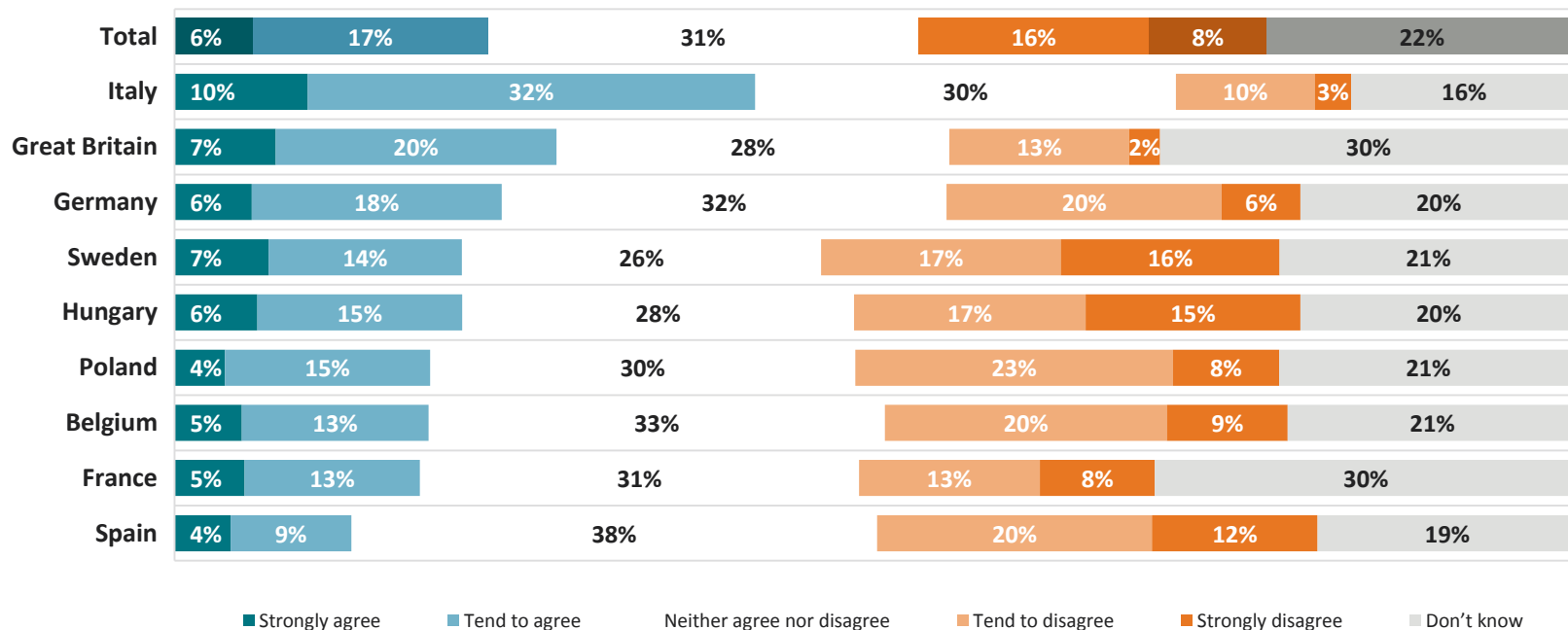
FEW ARE VERY INTERESTED IN THE UPCOMING EUROPEAN ELECTIONS – BRITONS, BELGIANS AND THE FRENCH ARE AMONG THE LEAST INTERESTED

How interested, if at all, are you in the upcoming European elections?



AROUND ONE IN FOUR EXPECT ANTI-MOVEMENTS TO WIN IN THE NEXT EUROPEAN ELECTIONS – ALTHOUGH THIS RISES TO TWO IN FIVE IN ITALY

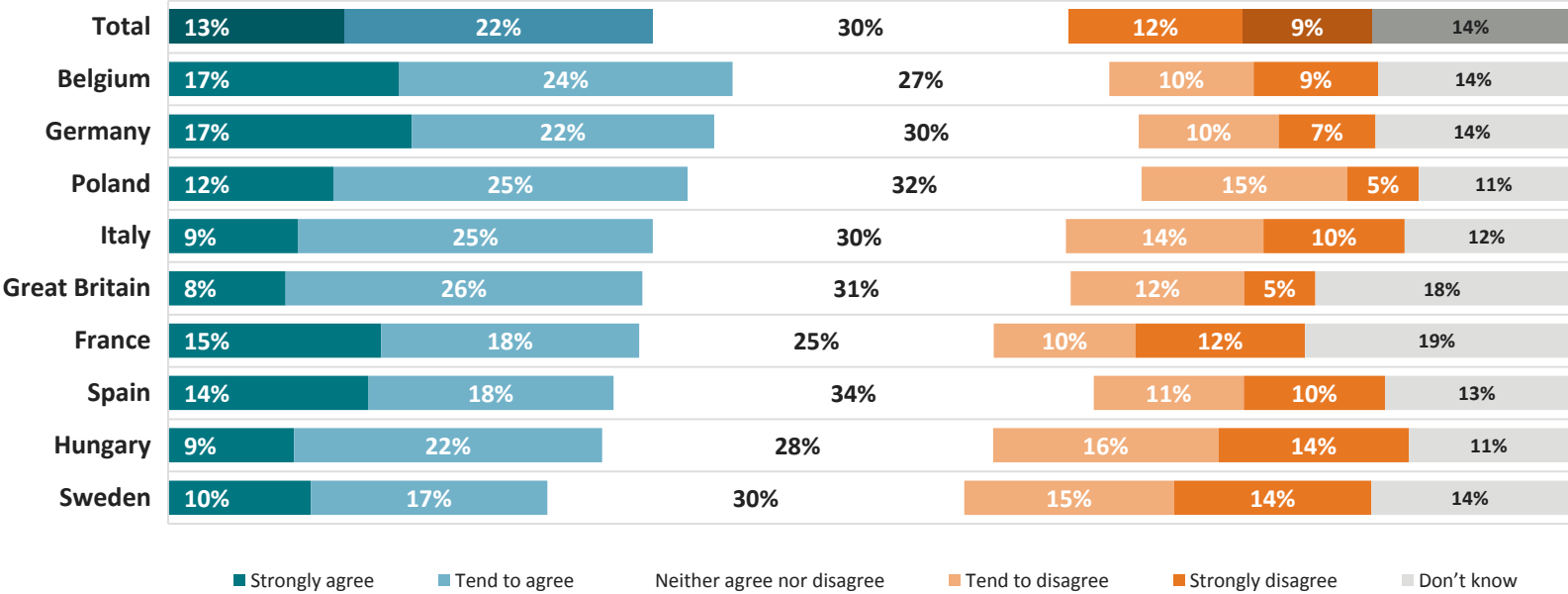
*And to what extent do you agree or disagree that: The next European elections in my country will be won by anti-European movements**



In Great Britain this question was asked as "The next European elections will be won by anti-European movements"

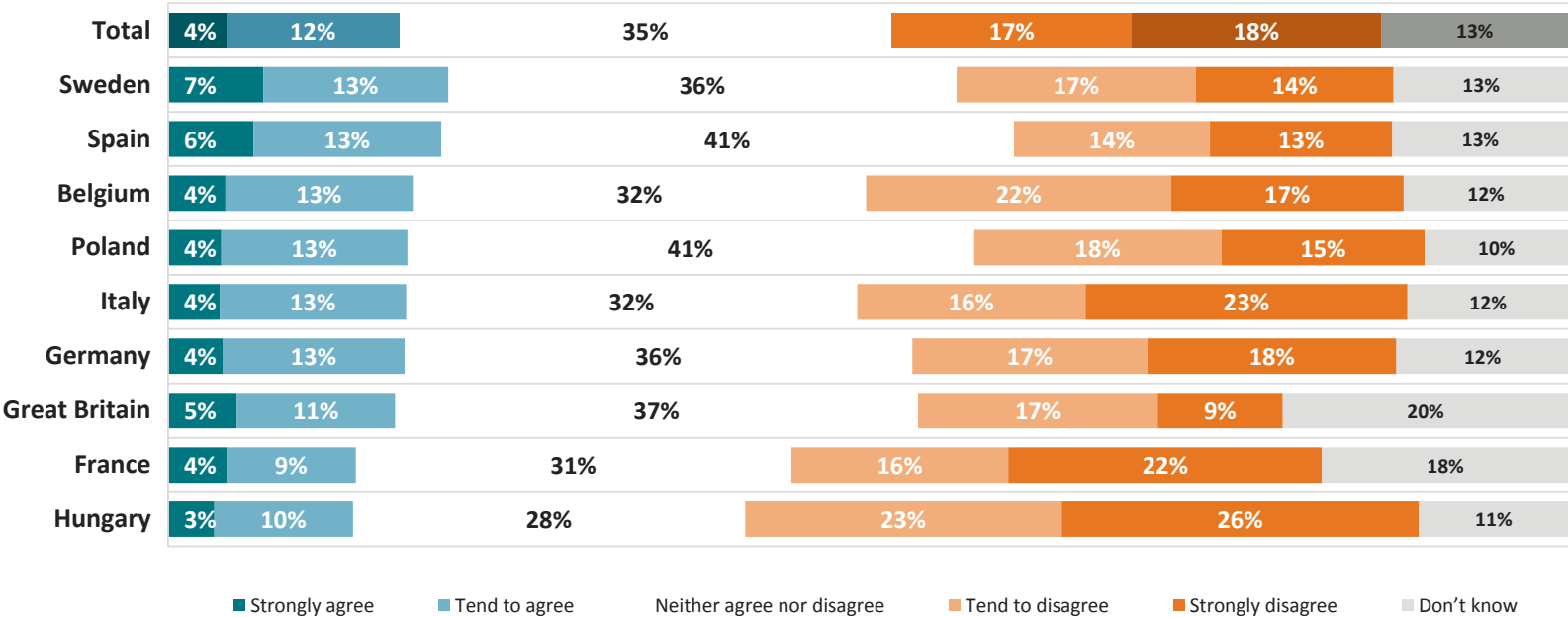
ONE IN THREE AGREE THAT IN THE EUROPEAN ELECTIONS IT'S TOO RISKY TO ELECT NEW POLITICAL PARTIES WITH RADICAL IDEAS FOR CHANGE

And to what extent do you agree or disagree that: In the European elections, it's too risky to elect political parties with radical ideas for change who haven't been in power before



BUT SUPPORT FOR TRADITIONAL PARTIES IS ALSO LOW WITH JUST 16% SAYING VOTERS SHOULD STICK WITH POLITICAL PARTIES WHO HAVE BEEN IN POWER BEFORE

*And to what extent do you agree or disagree that: At a time like the present, in the European elections we should stick with political parties who have been in power before**

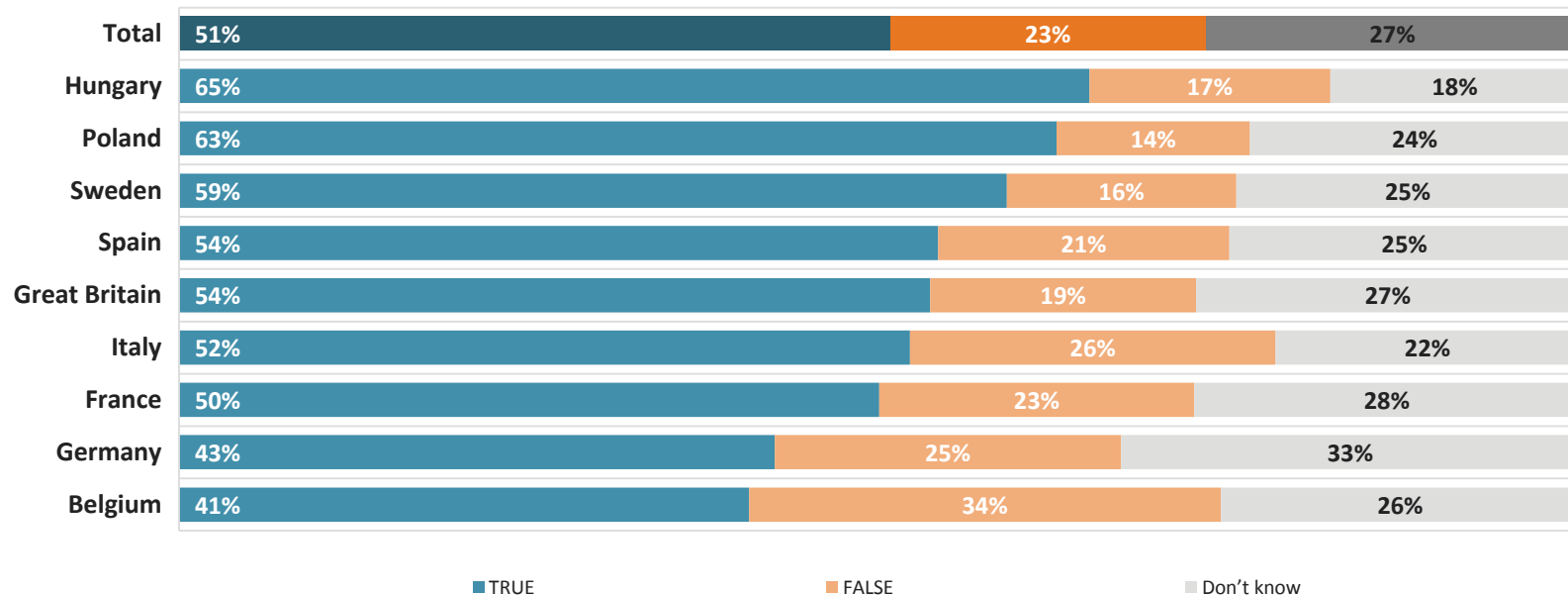


In Great Britain this question was asked as “At a time like the present, in the European elections voters should stick with political parties who have been in power before”

ONLY AROUND HALF ON AVERAGE KNOW THAT MEMBERS OF THE EUROPEAN PARLIAMENT ARE DIRECTLY ELECTED – BELGIANS AND GERMANS ARE LESS CERTAIN

Please tell me whether you think the following statement is true or false:

The members of the European Parliament (MEPs) are directly elected by the citizens of each member state they represent





LOOKING TO THE FUTURE



















GAME CHANGERS



EUROPEANS THINK EU'S MOST IMPORTANT PRIORITIES SHOULD BE REDUCING POVERTY AND SOCIAL INEQUALITY, FIGHTING ORGANISED CRIME AND TERRORISM, CREATING ECONOMIC GROWTH, REDUCING ILLEGAL IMMIGRATION AND PROTECTING THE ENVIRONMENT

*What do you think should be the most important priorities for the European Union in the coming years?
(up to five responses)*

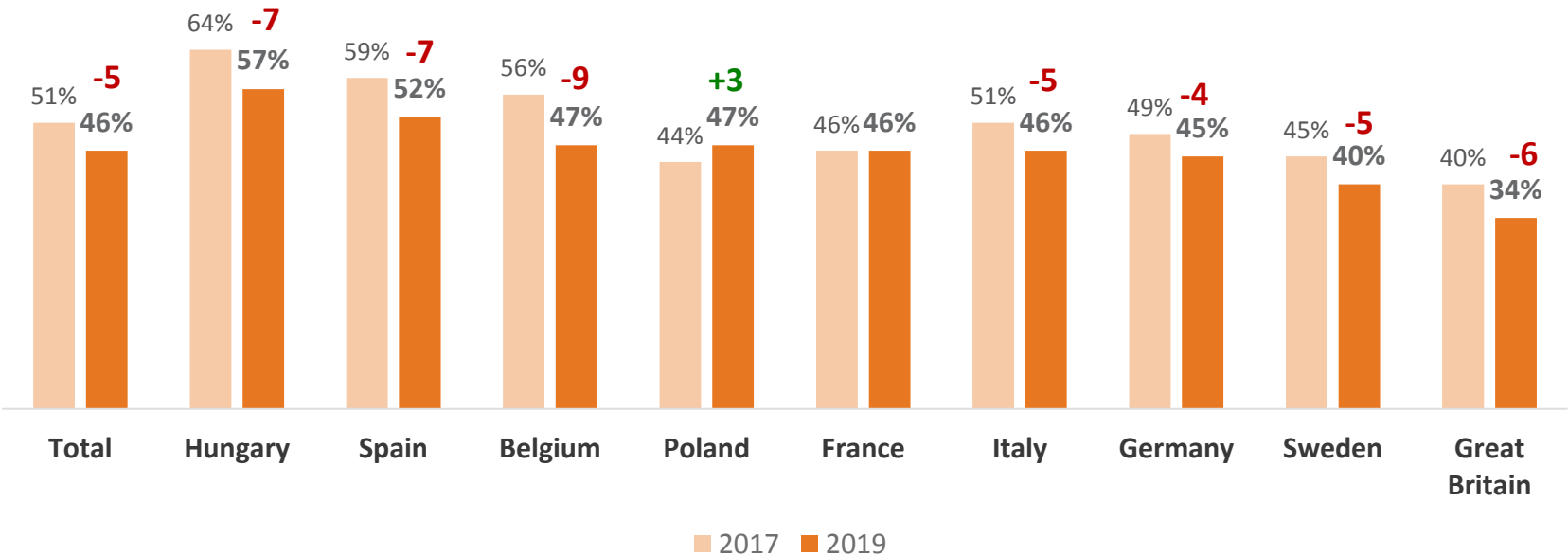
 EU average

2019 v 2017			2019 v 2017		
Reducing poverty and social inequality	 46%	-5	Investing in high-quality education	 18%	+1
Fighting organised crime and terrorism	 37%	-7	Investing in science, technology and innovation	 17%	+1
Create economic growth and jobs	 36%	-8	Dealing with problems caused by the ageing of society	 13%	-1
Protecting the environment	 37%	+11	Reducing bureaucracy for businesses	 12%	0
Reducing illegal immigration from outside the European Union	 36%	-4	Increase the EU's democratic accountability/legitimacy	 11%	0
Fighting tax fraud, tax evasion and tax avoidance	 27%	-3	Protecting people's privacy online	 10%	+3
Developing renewable energy	 26%	+3	Fighting instability in regions bordering the EU	 9%	-3
Reduce energy consumption and emissions	 24%	+4	Managing Britain's exit from the European Union	 9%	-3
Protecting the safety of the food we eat	 20%	+1	Make it easier to buy online from any country in the European Union	 4%	0

A MAJORITY FIND REDUCING POVERTY AND SOCIAL INEQUALITY A PRIORITY IN HUNGARY AND SPAIN

What do you think should be the most important priorities for the European Union in the coming years?

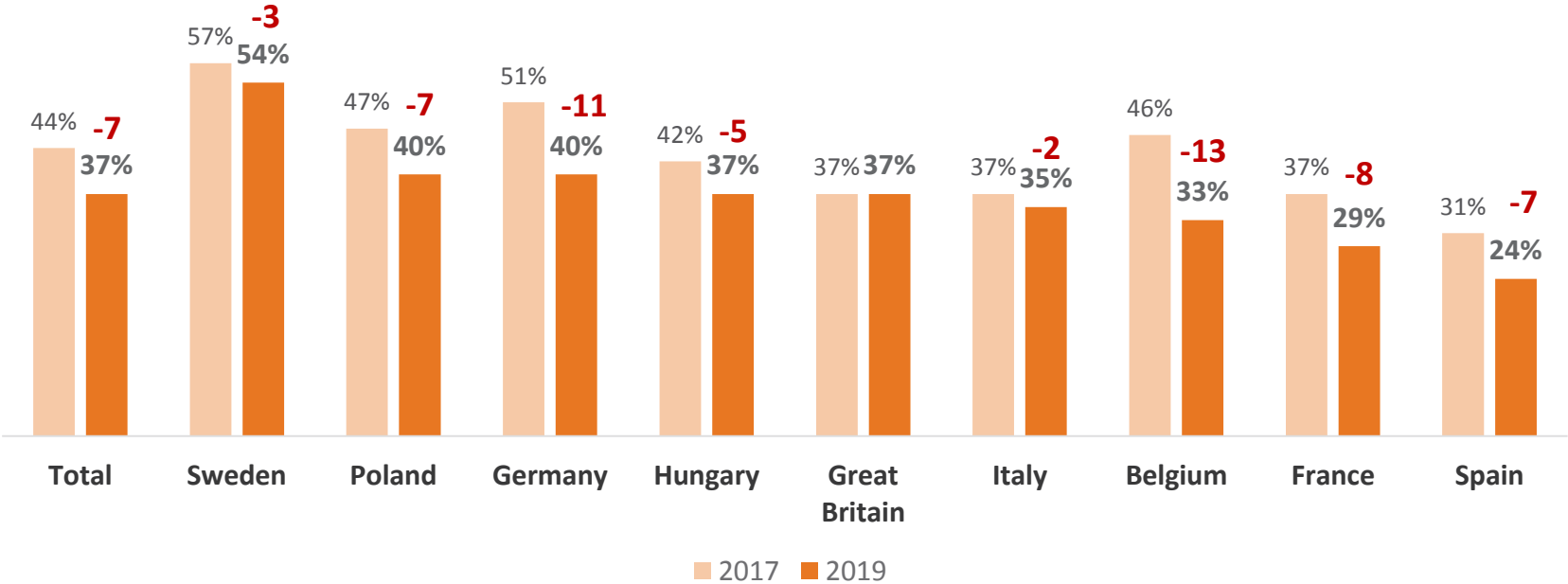
Reducing poverty and social inequality



SWEDEN PLACES THE MOST PRIORITY ON FIGHTING ORGANISED CRIME AND TERRORISM

What do you think should be the most important priorities for the European Union in the coming years?

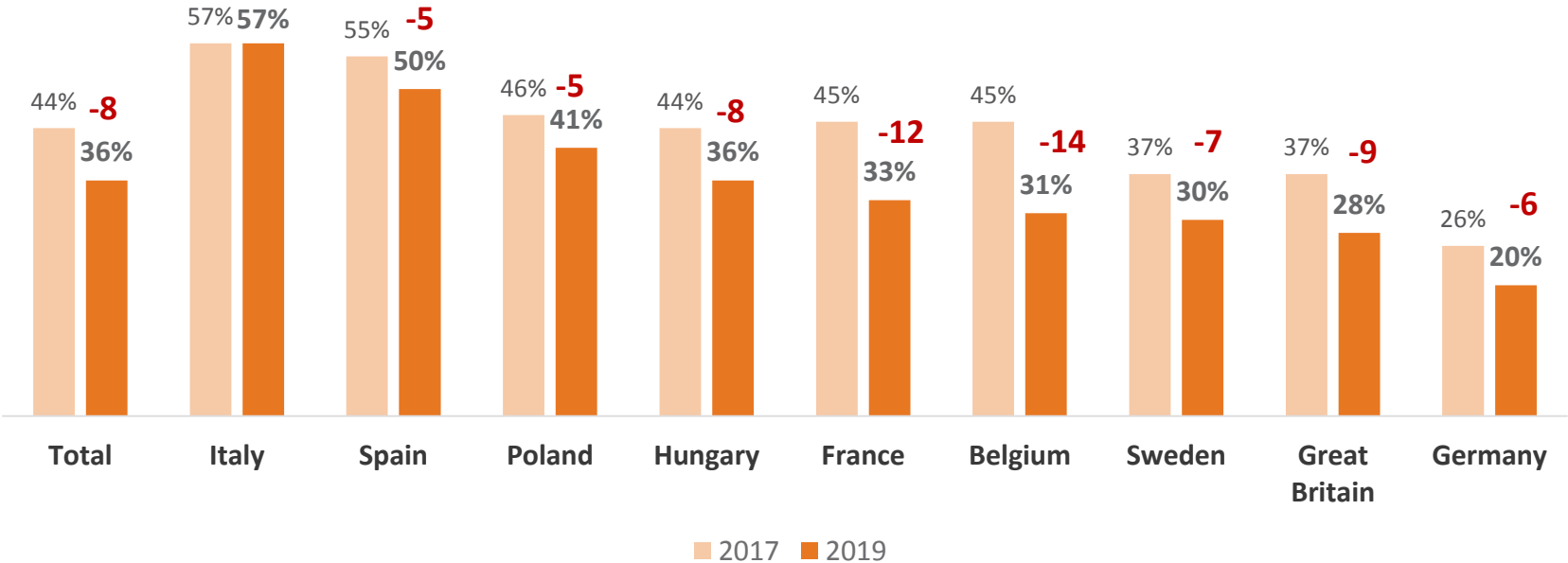
Fighting organised crime and terrorism



THOSE IN ITALY AND SPAIN ARE MOST LIKELY TO SEE CREATING ECONOMIC GROWTH AS A TOP PRIORITY FOR THE EU WHILE GERMANS AND BRITS ARE LEAST LIKELY

What do you think should be the most important priorities for the European Union in the coming years?

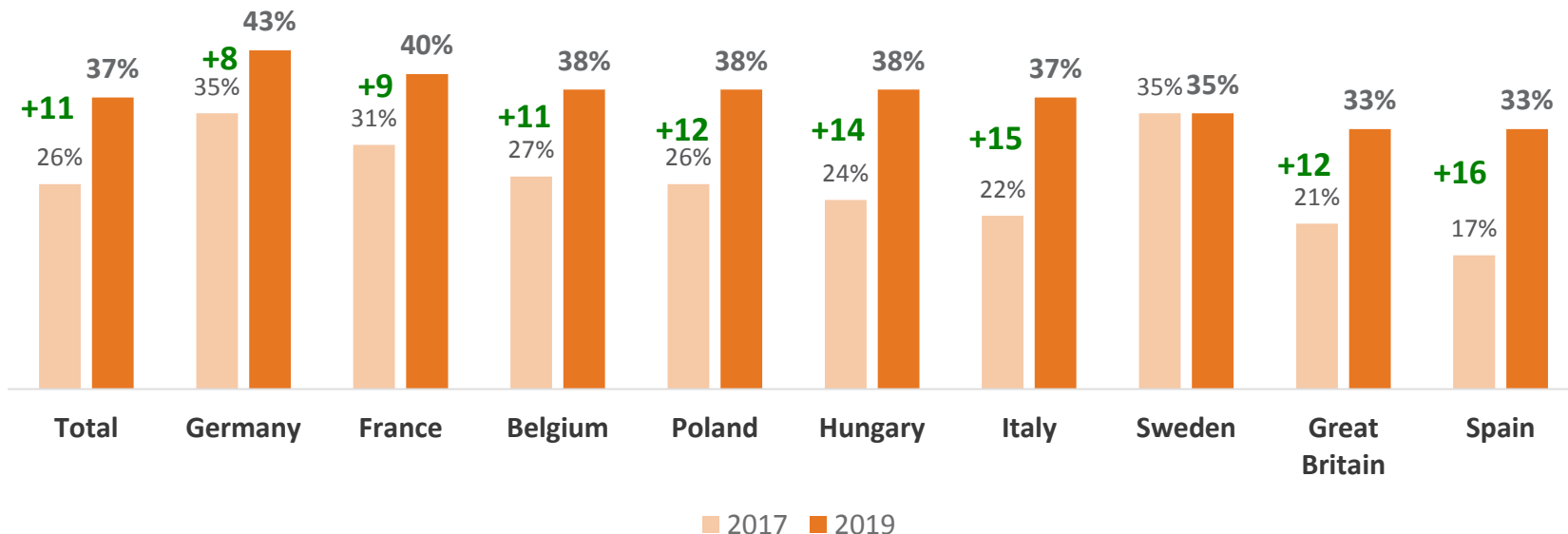
Create economic growth and jobs



MORE IN EUROPE NOW SEE PROTECTING THE ENVIRONMENT AS A PRIORITY; THE ONLY ONE OF THE TOP PRIORITIES WHICH HAS SEEN CONSIDERABLE GROWTH IN CONCERN ACROSS THE BOARD

What do you think should be the most important priorities for the European Union in the coming years?

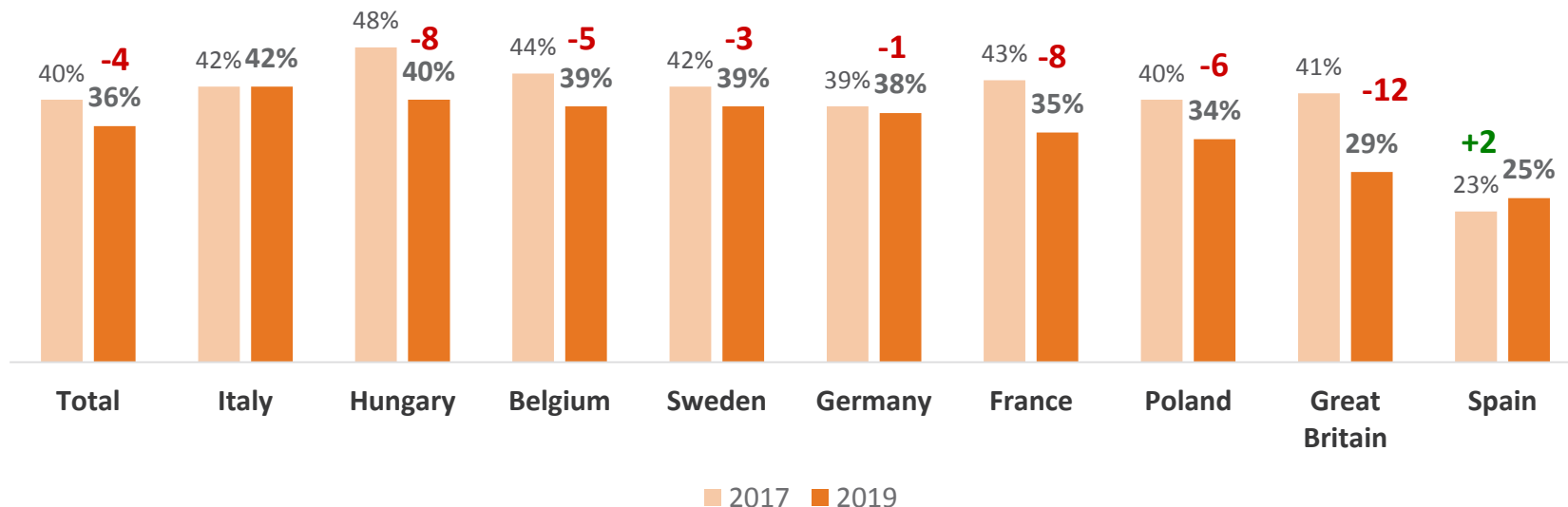
Protecting the environment



ITALIANS AND HUNGARIANS ARE MOST LIKELY TO WANT THE EU TO PRIORITISE REDUCING ILLEGAL IMMIGRATION FROM OUTSIDE THE EU WHILE THOSE IN SPAIN AND BRITAIN ARE LEAST LIKELY

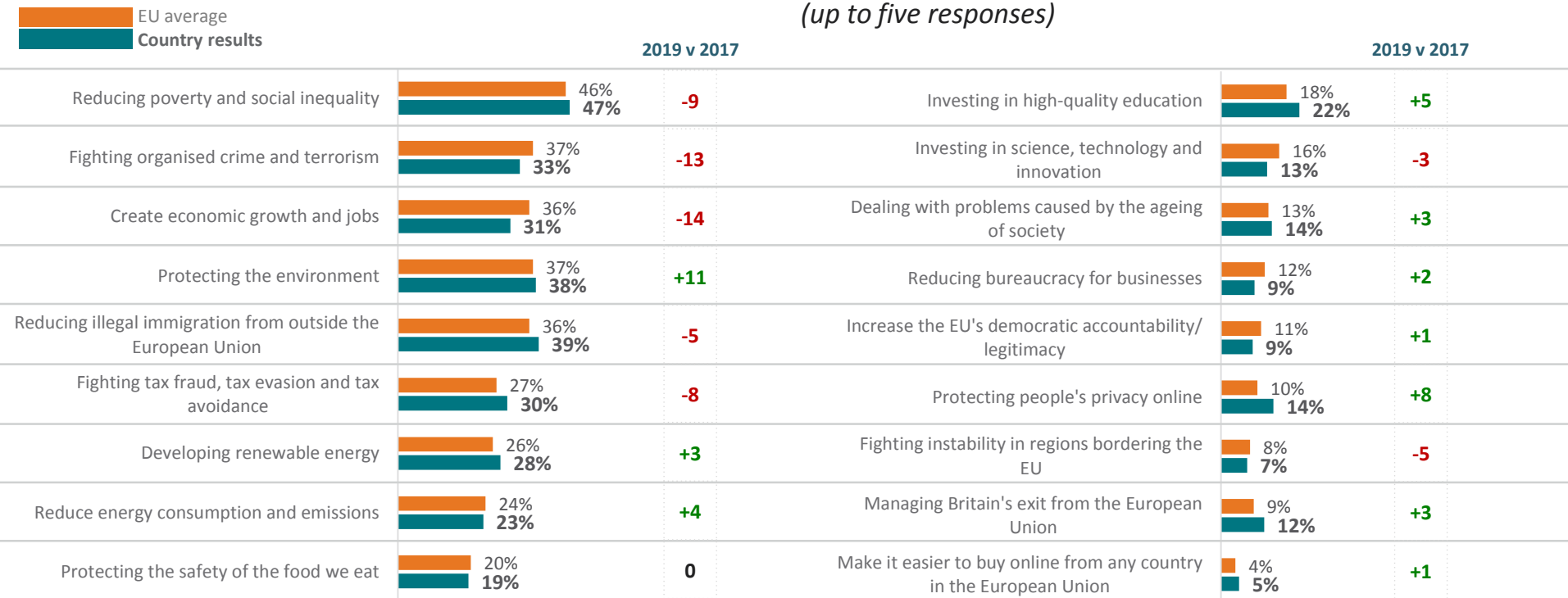
What do you think should be the most important priorities for the European Union in the coming years?

Reducing illegal immigration from outside the European Union



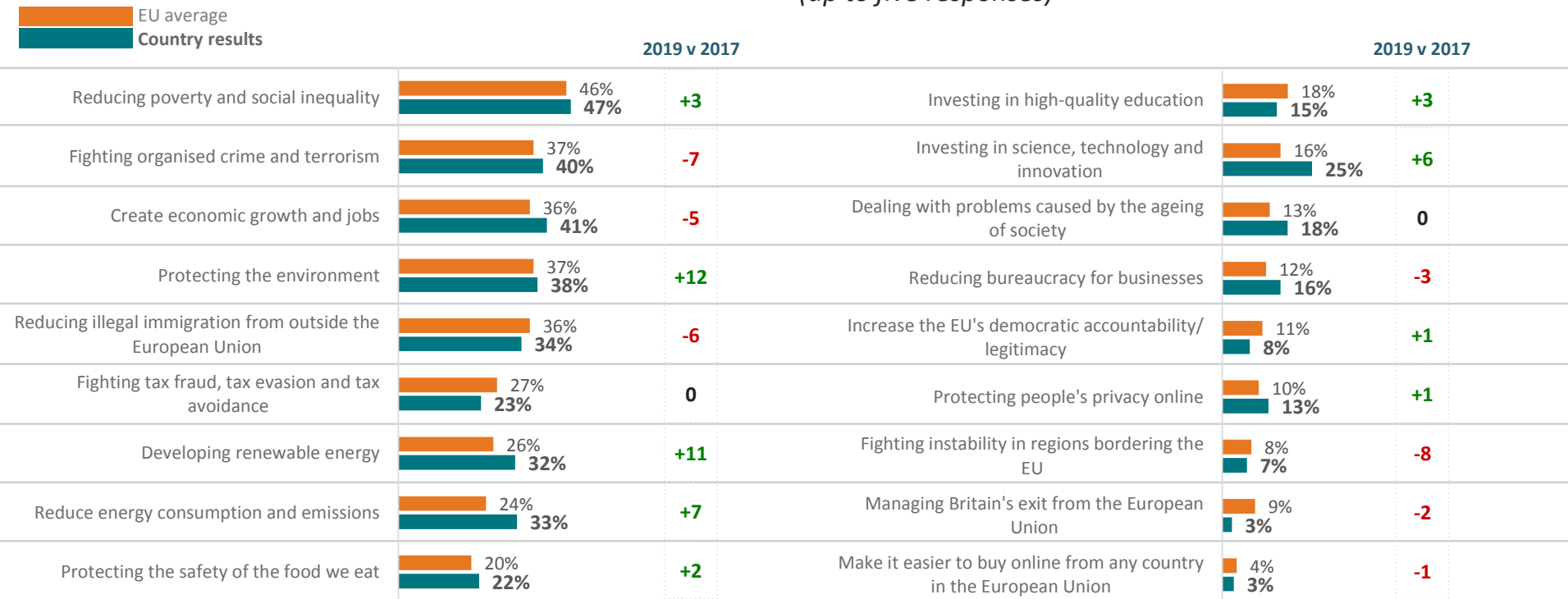
RESULTS IN **BELGIUM** ARE IN LINE WITH THE AVERAGE RESULTS.

*What do you think should be the most important priorities for the European Union in the coming years?
(up to five responses)*

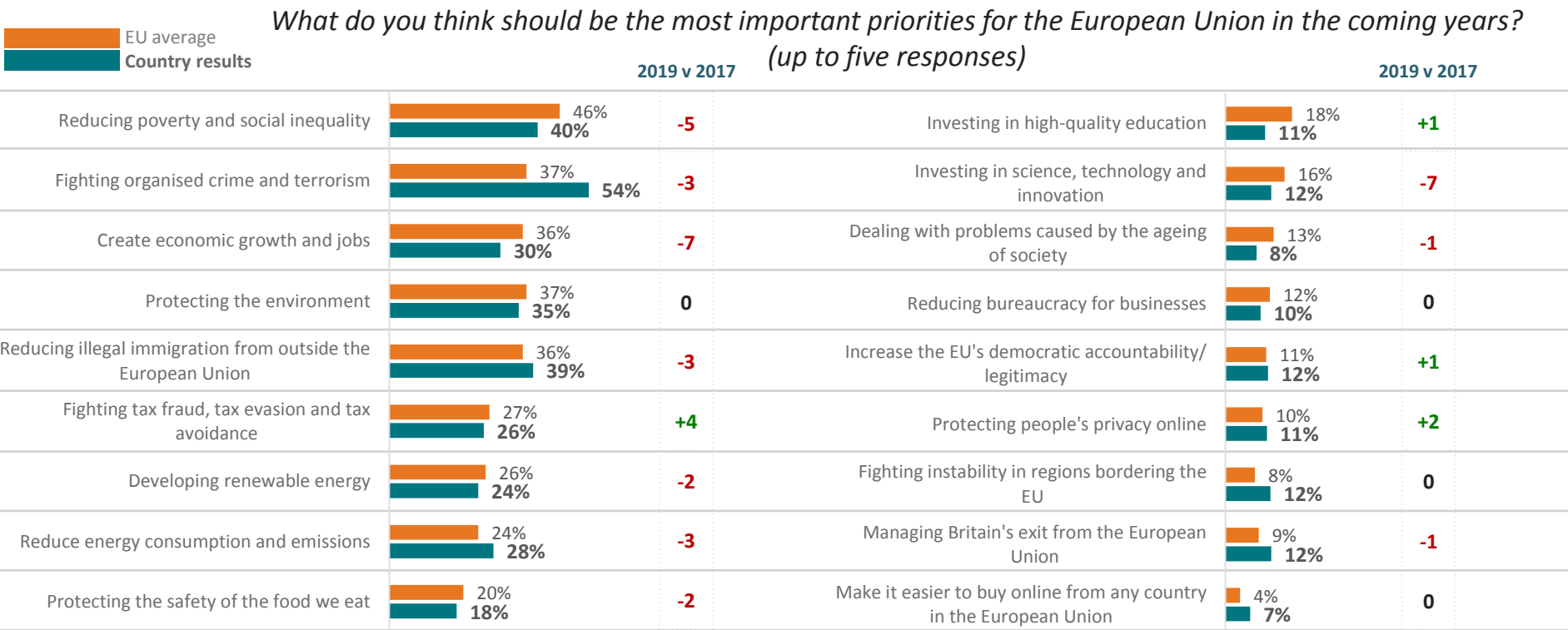


MORE IN **POLAND** THINK THE EU SHOULD BE PRIORITISING CREATING ECONOMIC GROWTH AND JOBS, AND MORE CONCERN ABOUT INVESTING IN SCIENCE AND TECHNOLOGY

*What do you think should be the most important priorities for the European Union in the coming years?
(up to five responses)*

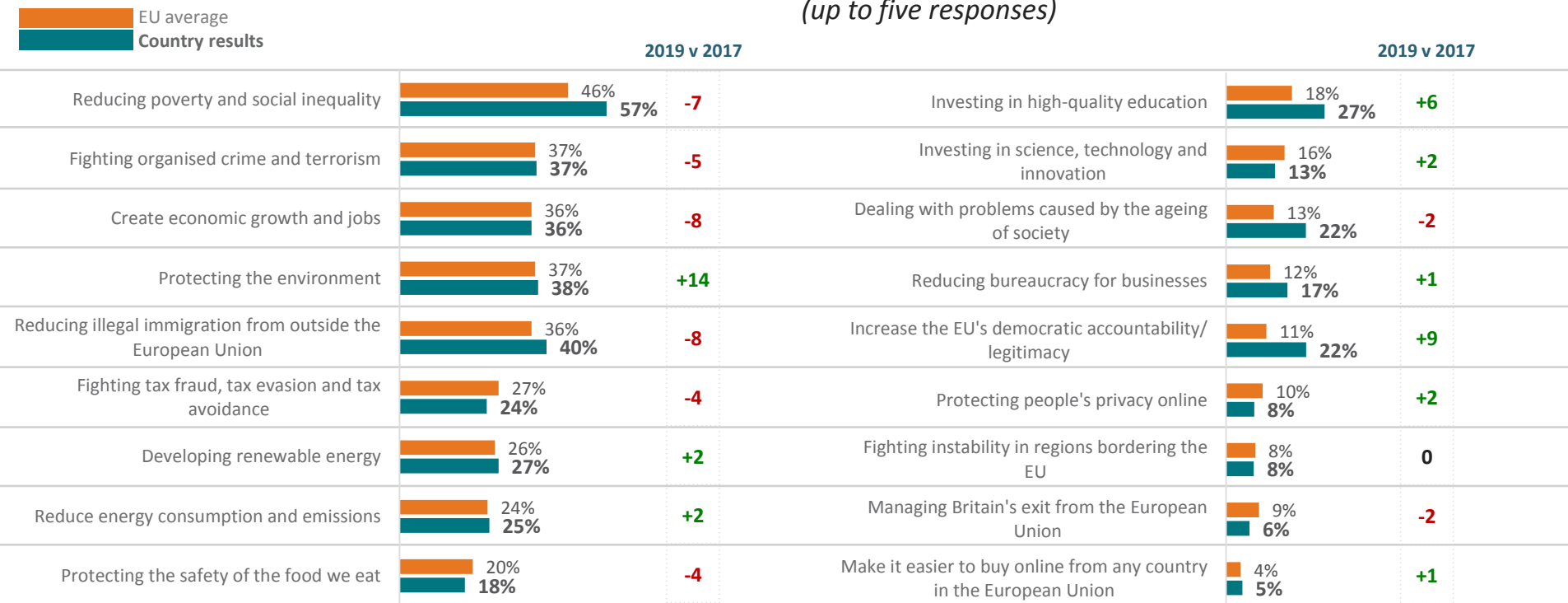


SWEDES ARE FAR MORE CONCERNED ABOUT FIGHTING ORGANISED CRIME AND TERRORISM THAN THE REST OF EUROPE, WHILE ALSO WANTING TO PRIORITISE REDUCING POVERTY AND SOCIAL INEQUALITY



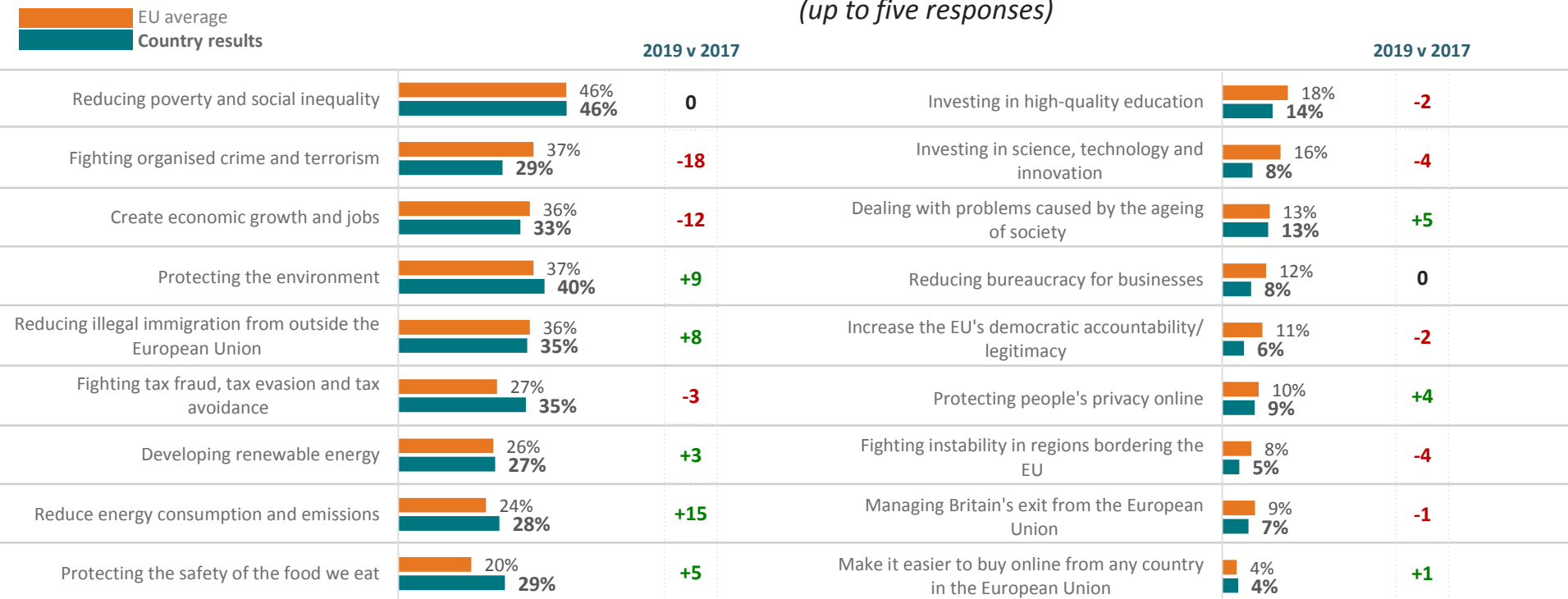
HUNGARIANS' TOP PRIORITY FOR THE EU IS THE REDUCTION OF POVERTY AND SOCIAL INEQUALITY, FOLLOWED BY THE REDUCTION OF ILLEGAL IMMIGRATION FROM OUTSIDE THE EU.

*What do you think should be the most important priorities for the European Union in the coming years?
(up to five responses)*

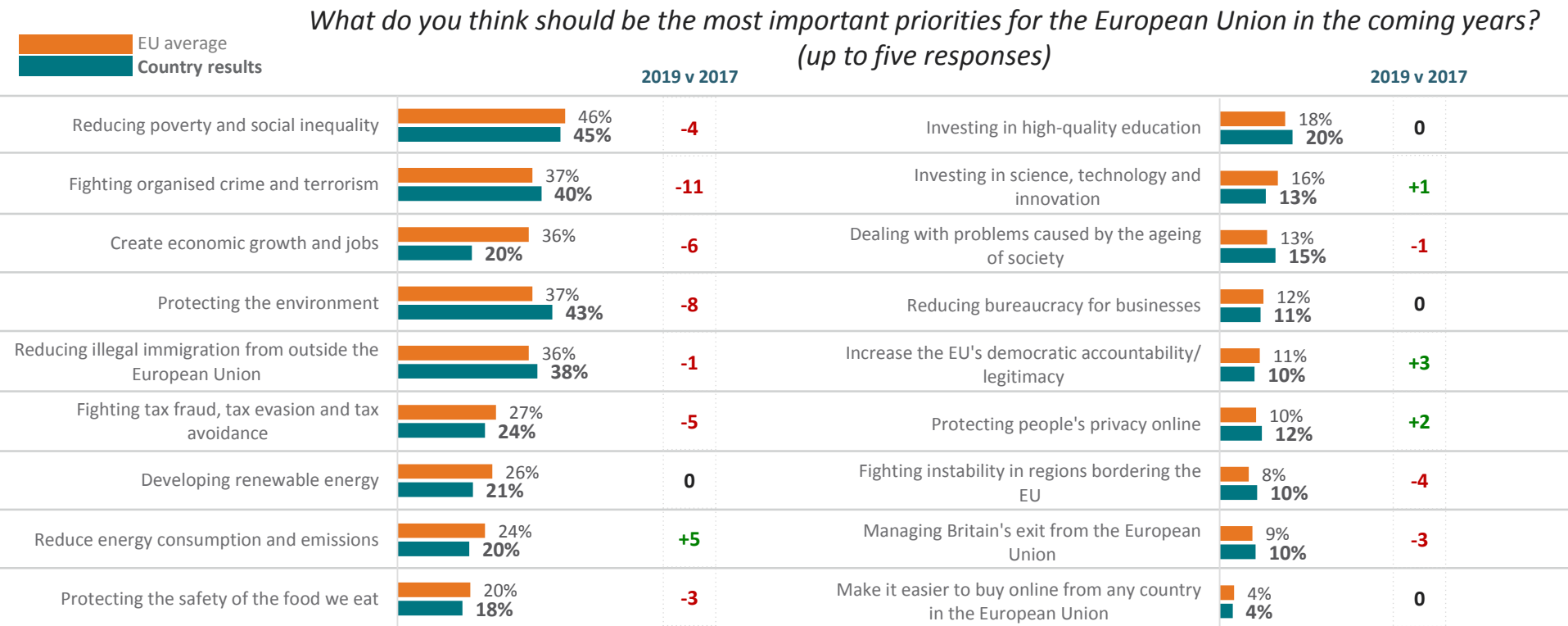


RESULTS IN FRANCE ARE IN LINE WITH THE AVERAGE RESULTS. FIGHTING TAX FRAUD, TAX EVASION AND TAX AVOIDANCE AND FOOD SAFETY ARE CITED SLIGHTLY MORE IN FRANCE

*What do you think should be the most important priorities for the European Union in the coming years?
(up to five responses)*

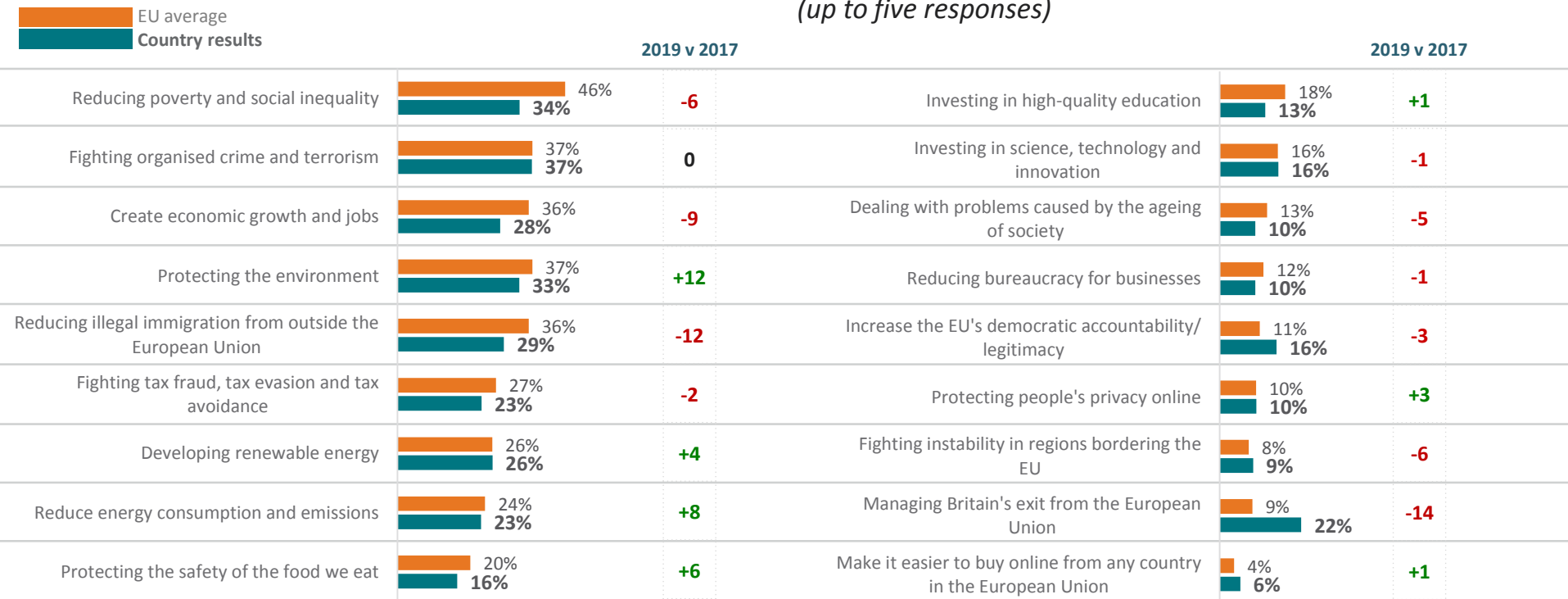


GERMANS' MOST IMPORTANT PRIORITIES FOR THE EU ARE REDUCING POVERTY AND SOCIAL INEQUALITY, PROTECTING THE ENVIRONMENT AND FIGHTING ORGANISED CRIME AND TERRORISM. ECONOMIC GROWTH LESS IMPORTANT IN GERMANY.



BRITS HAVE THE SIMILAR PRIORITIES FOR THE EU AS OTHER EUROPEANS BUT ATTACH MUCH MORE IMPORTANCE TO HOW THE EU WILL MANAGE BREXIT THAN OTHER COUNTRIES DO


























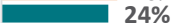










*What do you think should be the most important priorities for the European Union in the coming years?
(up to five responses)*



RESULTS IN ITALY SHOW CREATING ECONOMIC GROWTH AND JOBS AND REDUCING IMMIGRATION ARE PARTICULAR PRIORITIES

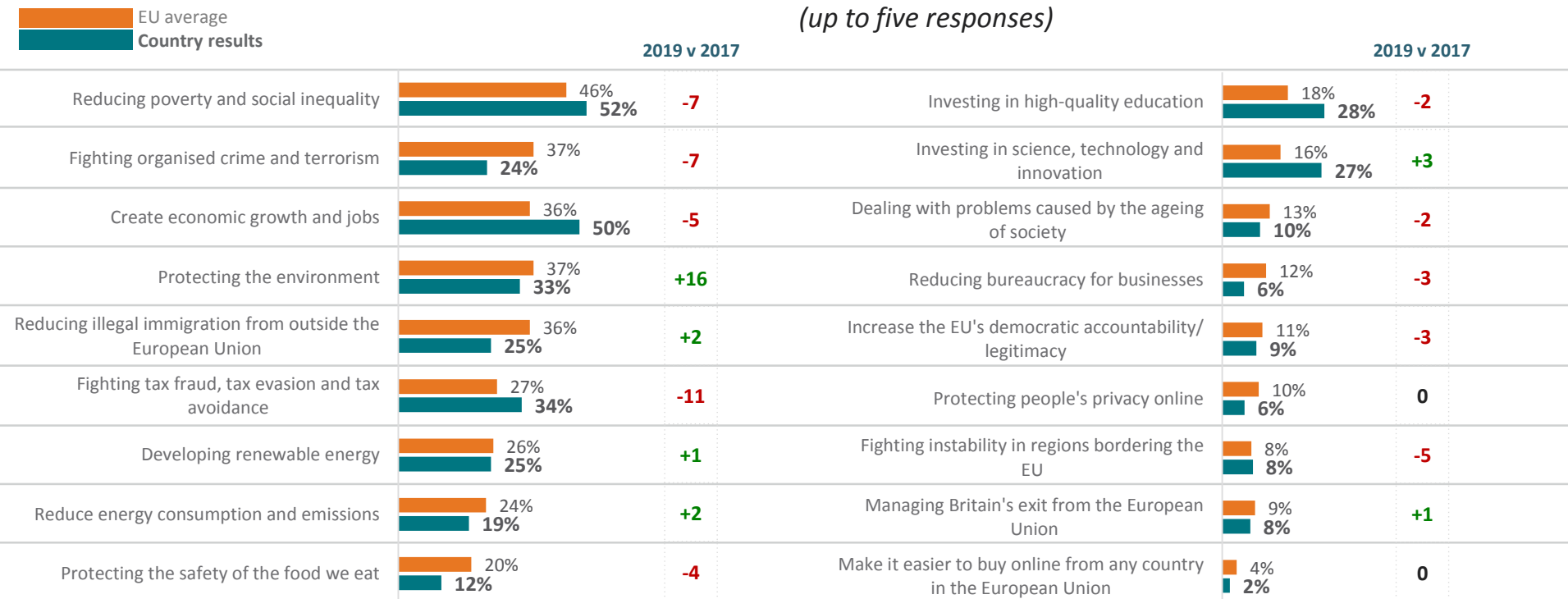
*What do you think should be the most important priorities for the European Union in the coming years?
(up to five responses)*

 EU average
 Country results

2019 v 2017				2019 v 2017			
Reducing poverty and social inequality	 46%  46%	-5		Investing in high-quality education	 18%  18%	+3	
Fighting organised crime and terrorism	 37%  35%	-2		Investing in science, technology and innovation	 16%  19%	-1	
Create economic growth and jobs	 36%  57%	0		Dealing with problems caused by the ageing of society	 13%  9%	+2	
Protecting the environment	 37%  37%	+15		Reducing bureaucracy for businesses	 12%  20%	0	
Reducing illegal immigration from outside the European Union	 36%  42%	0		Increase the EU's democratic accountability/legitimacy	 11%  6%	-2	
Fighting tax fraud, tax evasion and tax avoidance	 27%  25%	0		Protecting people's privacy online	 10%  6%	0	
Developing renewable energy	 26%  24%	+5		Fighting instability in regions bordering the EU	 8%  4%	-3	
Reduce energy consumption and emissions	 24%  19%	+4		Managing Britain's exit from the European Union	 9%  4%	-2	
Protecting the safety of the food we eat	 20%  25%	+5		Make it easier to buy online from any country in the European Union	 4%  3%	-1	

IN SPAIN THE MOST IMPORTANT PRIORITIES FOR THE EU ARE THE REDUCTION OF POVERTY AND SOCIAL INEQUALITY, THE CREATION OF ECONOMIC GROWTH AND JOBS AND FIGHTING TAX FRAUD, TAX EVASION, AND TAX AVOIDANCE

*What do you think should be the most important priorities for the European Union in the coming years?
(up to five responses)*



METHODOLOGY

- These are the findings of the Global Advisor Wave for the **2019 European Parliament Elections**, an Ipsos survey conducted between **March 22 – April 5 2019**.
- The survey instrument is conducted monthly in 28 countries around the world via the Ipsos Online Panel system. The countries reporting herein are Argentina, Australia, Belgium, Brazil, Canada, China, Chile, France, Great Britain, Germany, Hungary, India, Israel, Italy, Japan, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America.
- For the results of the survey presented herein, an international sample of **19, 531 adults** aged 18-74 in the US, Israel, Canada, China, Malaysia, South Africa and Turkey, and ages 16-74 in all other countries, were interviewed. Approximately 1000+ individuals participated on a country by country basis via the Ipsos Online Panel, with the exception of Argentina, Belgium, Chile, Hungary, India, Israel, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden and Turkey, where each have a sample approximately 500+.
- 15 of the 27 countries surveyed online generate nationally representative samples in their countries (Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, Poland, South Korea, Spain, Sweden, and United States).
- Brazil, China, Chile, India, Israel, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa and Turkey produce a national sample that is more urban & educated, and with higher incomes than their fellow citizens. We refer to these respondents as “Upper Deck Consumer Citizens”. They are not nationally representative of their country.
- Weighting was then employed to balance demographics and ensure that the sample's composition reflects that of the adult population according to the most recent country Census data, and to provide results intended to approximate the sample universe. A survey with an unweighted probability sample of this size and a 100% response rate would have an estimated margin of error of +/-3.1 percentage points for a sample of 1,000 and an estimated margin of error of +/- 4.5 percentage points 19 times out of 20 per country of what the results would have been had the entire population of adults in that country had been polled. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.

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