

# Voices of Europe

# A Call for Change

A hand is pointing at a glowing map of Europe. The map is composed of numerous small, bright orange and yellow dots connected by thin, glowing blue lines, creating a network-like structure. The background is a dark blue gradient with a subtle pattern of light blue dots and lines, suggesting a global or digital theme.

Ipsos European Public Affairs

Ipsos KnowledgePanel

April 2025

***“To secure the EU's future,  
its leaders must earn trust  
from the “Moveable  
Middle”, defend democracy  
and deliver progress,  
guided not only by an  
ideological vision, but by  
the voices of its people.”***

**Christine Tresignie**  
**Head of Public Affairs Europe**

**Engage the “Moveable Middle”**

Prioritize outreach to citizens who are open to change but require meaningful reforms to build lasting trust.

**Reinforce core values**

Emphasize the EU’s commitment to democracy and rule of law to align with the public’s top concerns.

**Deliver on economic and environmental promises**

Advance policies that drive innovation and growth while addressing climate and food security, areas where public expectations are high.


**Foster inclusive dialogue**

Recognise the divide between calls for decentralisation and deeper integration. Involve citizens in discussions about the EU’s future direction, ensuring that reforms reflect diverse perspectives across the continent.

# SUPPORT FOR THE EU

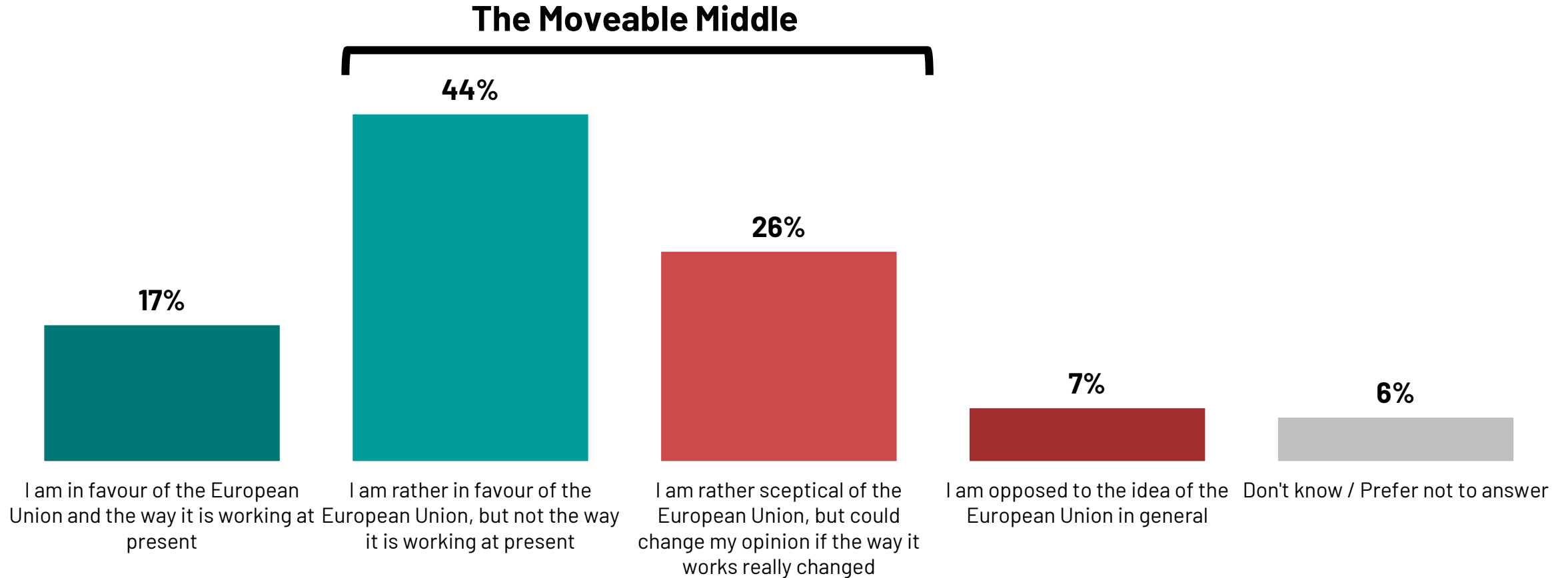
## THE MOVEABLE MIDDLE

# What is the Support of the European Project according to 6000 European citizens?



The data reveals that only a small minority (7%) are firmly opposed to the European Union, while 17% express full support for both the EU and its current functioning. The most significant insight lies in the **"moveable middle"**, the 70% of respondents who are either **supportive but dissatisfied** (44%) or **skeptical yet open to change** (26%). This large, persuadable segment represents a crucial opportunity for engagement: they care about the EU but seek meaningful reform. To maintain and strengthen public support, the EU must listen to this group's concerns and demonstrate its ability to evolve, deliver results, and build trust.

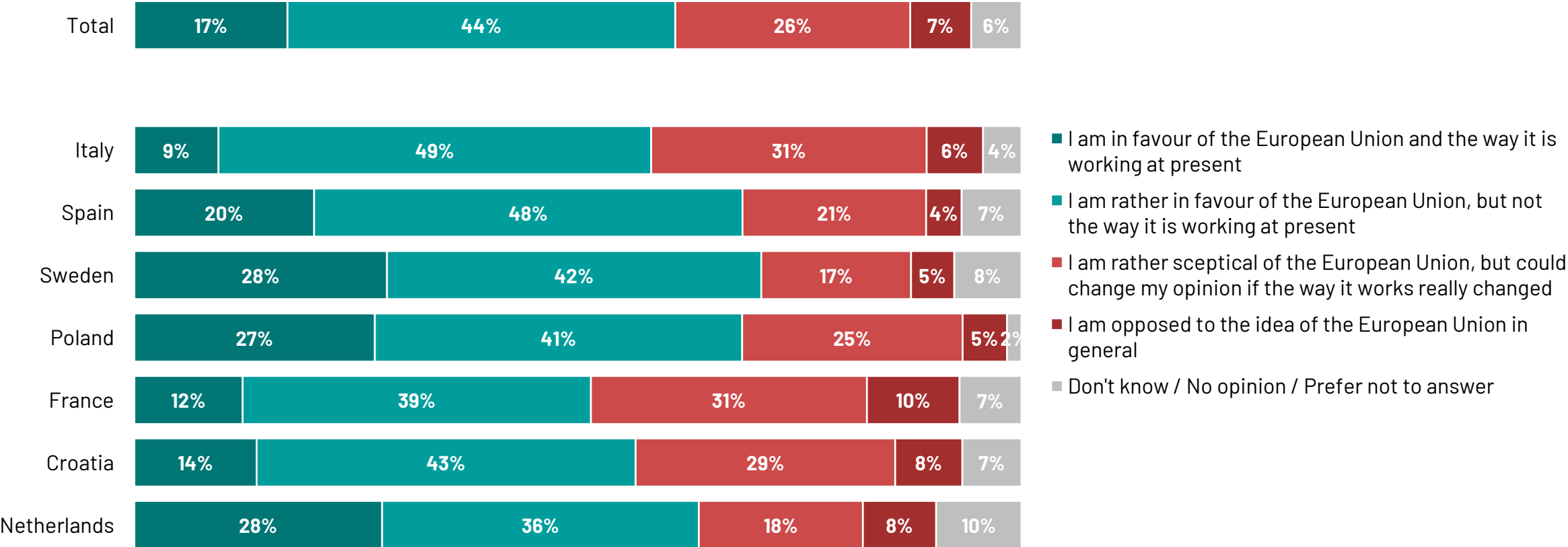
# Support for the EU



Which of the following statements regarding the European Union (EU) is closest to your opinion?  
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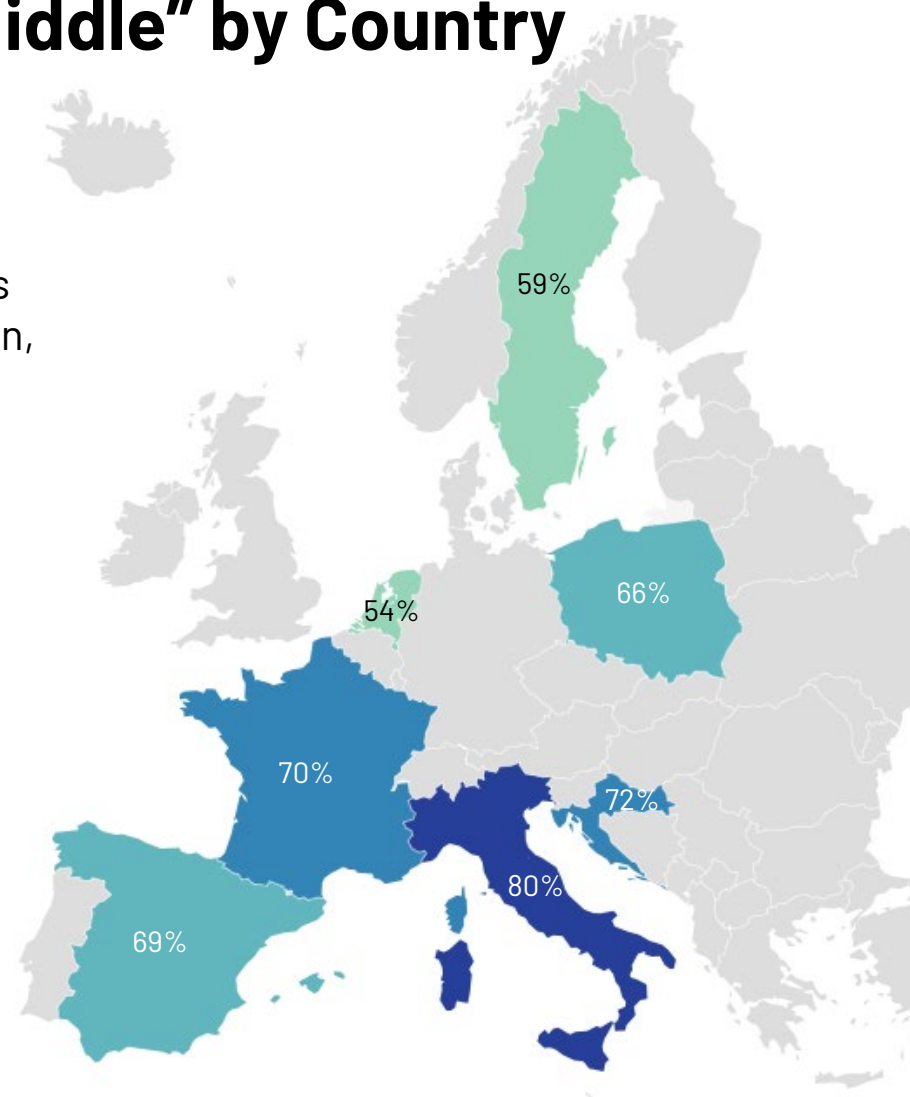
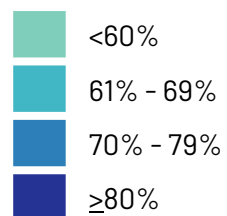
# Support for the EU by Country



Which of the following statements regarding the European Union (EU) is closest to your opinion?  
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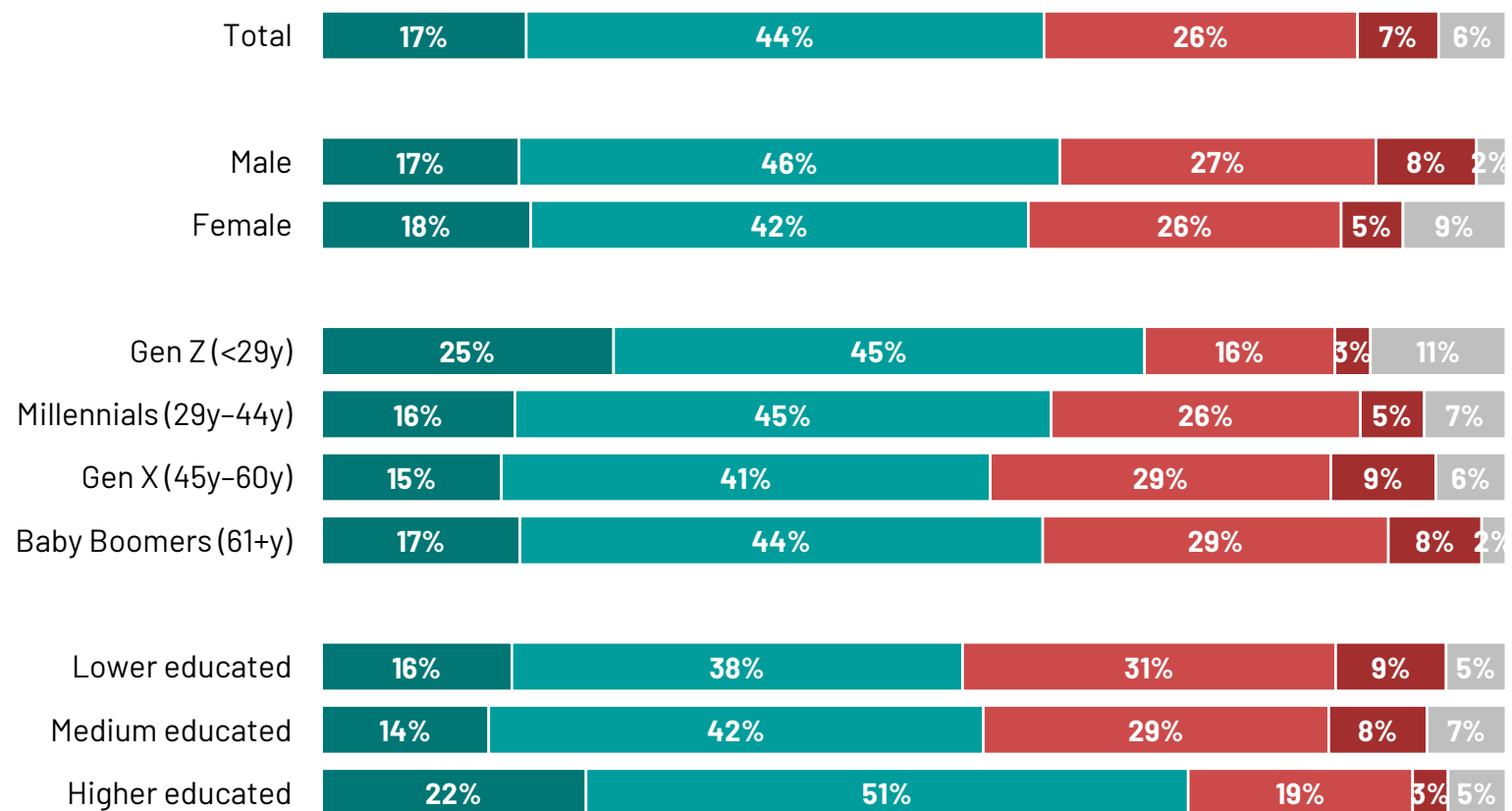
# Support for the EU - The “Moveable Middle” by Country

% I am rather in favour of the European Union, but not the way it is working at present + % I am rather sceptical of the European Union, but could change my opinion if the way it works really changed



Country  
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# Support for the EU by Socio-Demographics



- I am in favour of the European Union and the way it is working at present
- I am rather in favour of the European Union, but not the way it is working at present
- I am rather sceptical of the European Union, but could change my opinion if the way it works really changed
- I am opposed to the idea of the European Union in general
- Don't know / No opinion / Prefer not to answer

Which of the following statements regarding the European Union (EU) is closest to your opinion?  
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# PRIORITIES FOR THE EU

## DEMOCRACY & ECONOMY FIRST

# What should be the EU priorities according to 6000 European citizens?

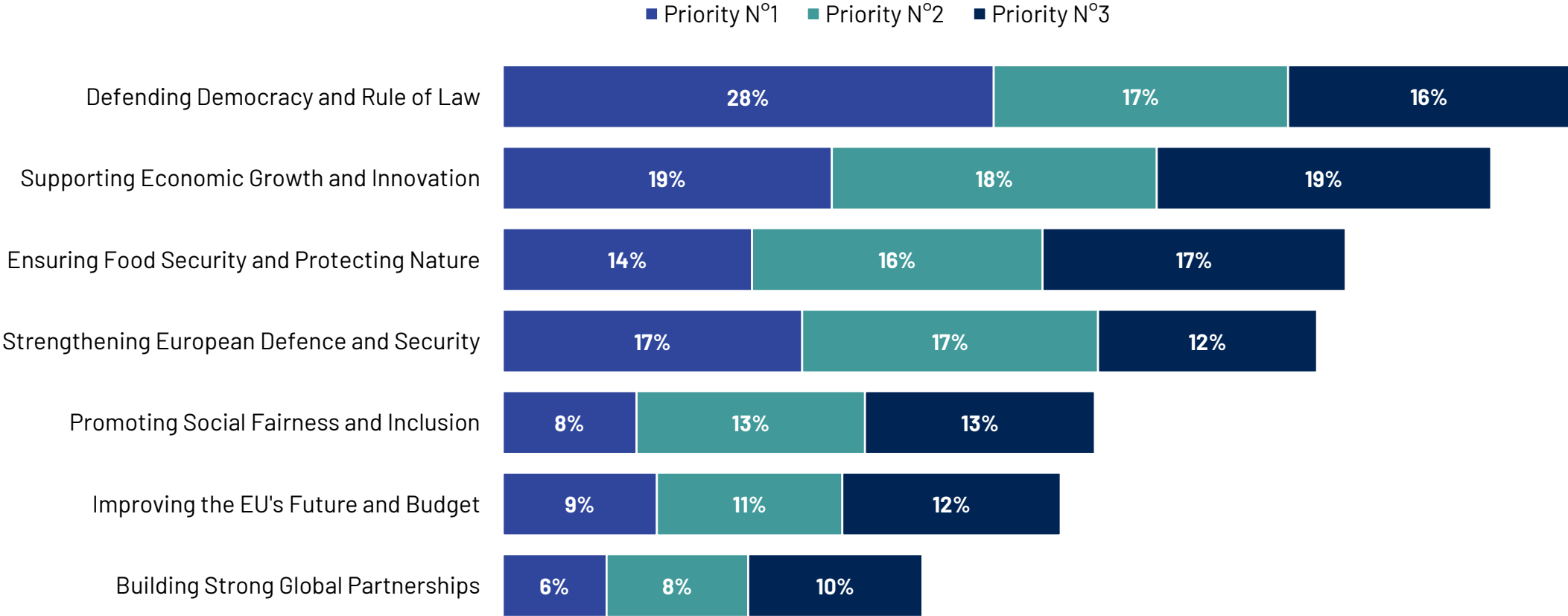


The results reveal that **defending democracy and the rule of law** stands as the foremost priority for citizens, with **28%** ranking it as their top concern and a total of **61%** placing it in their top three. This is closely followed by **supporting economic growth and innovation**, prioritized by **19%** as the most important issue and by **56%** overall in their top three – highlighting the public's concern for both political integrity and economic resilience.

Not far behind, **environmental protection and food security** (47% top-three ranking) and **European defence and security** (46% top-three) emerge as **shared secondary priorities**, reflecting citizens' dual concern for **planetary and personal safety**. Issues such as **social fairness and inclusion** (34%), **EU governance and budgeting** (32%), and **global partnerships** (24%) appear less urgent in the public eye, though still valued.

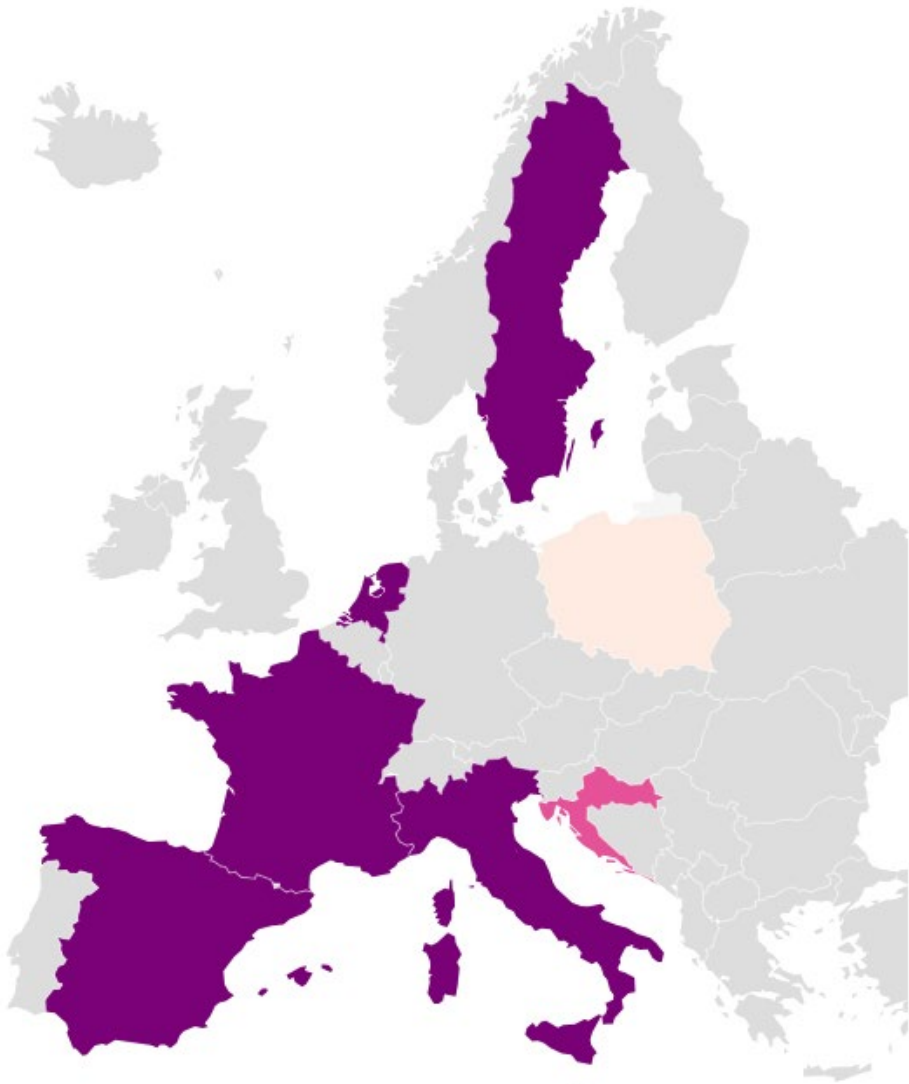
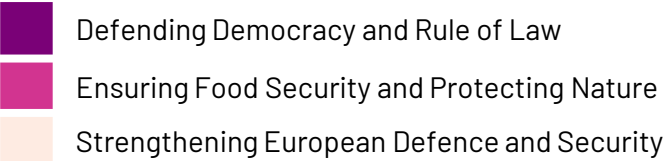
These insights suggest that to meet public expectations, the EU must focus on a **threefold agenda: safeguarding democracy, strengthening the economy, and ensuring both environmental and physical security**.

# Priorities for the EU – Top 3



Which are the most important issues the European Union (EU) should focus on?  
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# Priorities for the EU – Number 1 priority by Country



Which are the most important issues the European Union (EU) should focus on?  
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# Priorities for the EU – Number 1 priority by Socio-Demographics

		Gender		Generation				Education		
	Total	Male	Female	Gen Z (<29y)	Millennials (29-44y)	Gen X (45-60y)	Baby Boomers (>60y)	Low	Medium	High
Defending Democracy and Rule of Law	28%	25%	30%	23%	24%	28%	33%	31%	25%	30%
Supporting Economic Growth and Innovation	19%	22%	15%	20%	21%	19%	16%	15%	21%	19%
Strengthening European Defence and Security	17%	16%	18%	14%	15%	17%	20%	14%	19%	18%
Ensuring Food Security and Protecting Nature	14%	13%	16%	16%	14%	15%	12%	17%	14%	12%
Improving the EU's Future and Budget	9%	11%	7%	12%	10%	8%	7%	11%	9%	6%
Promoting Social Fairness and Inclusion	8%	7%	9%	9%	9%	8%	6%	7%	8%	8%
Building Strong Global Partnerships	6%	7%	5%	6%	7%	6%	6%	7%	5%	7%

Which are the most important issues the European Union (EU) should focus on?


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# **EU IN 2035**

## **FROM DISINTEGRATION TO FULL UNIFICATION**



# What should the EU look like in 2035 according to 6000 European citizens?

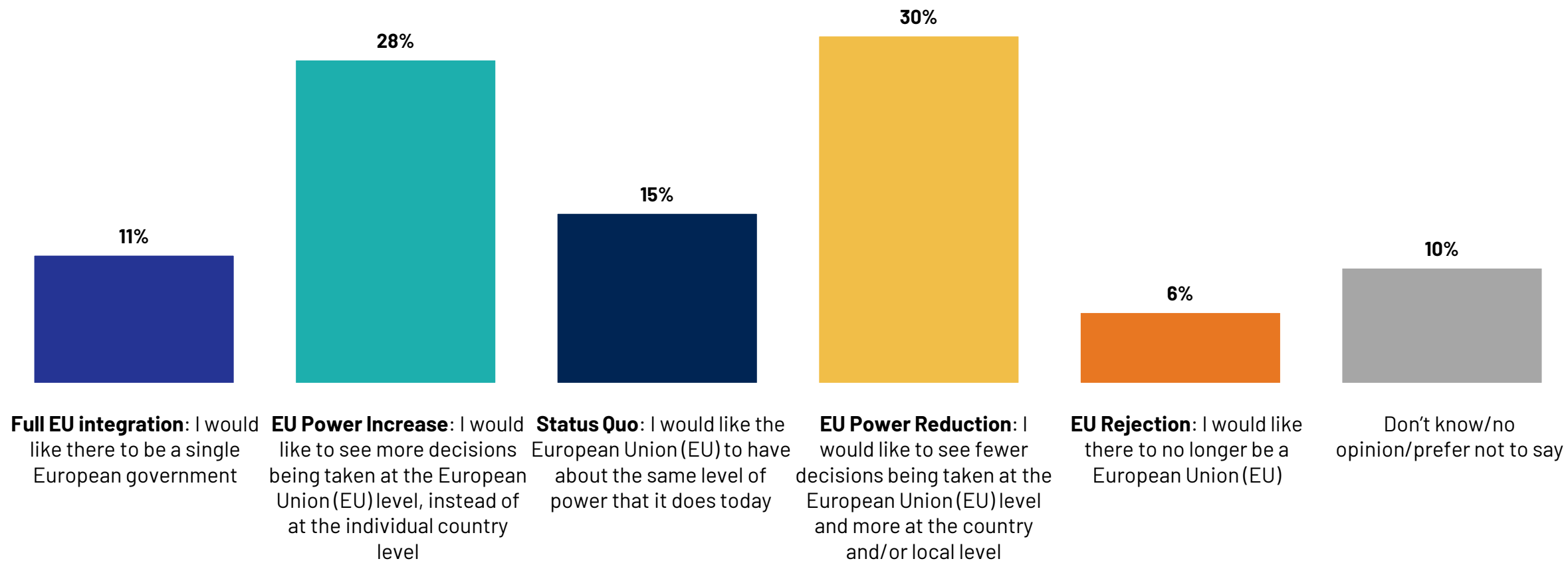


Public views on the future of the European Union (EU) by 2035 reveal a landscape shaped by a desire for both reform and ambition. The most supported vision is **EU Power Reduction** (30%), indicating a strong preference for decentralization and more national or local decision-making. Close behind, however, is **EU Power Increase** (28%), showing that nearly as many citizens envision a stronger and more centralized EU.

A smaller segment prefers the **Status Quo** (15%), while 11% advocate for **Full EU Integration** through a single European government. Only 6% support **EU Rejection**, confirming that outright opposition remains limited.

These results highlight a **diverse but engaged public**, with a significant portion split between those seeking a more national-centered EU and those favoring deeper integration. This underscores the importance of **flexibility, responsiveness, and inclusive dialogue** in shaping the EU's evolution toward 2035.

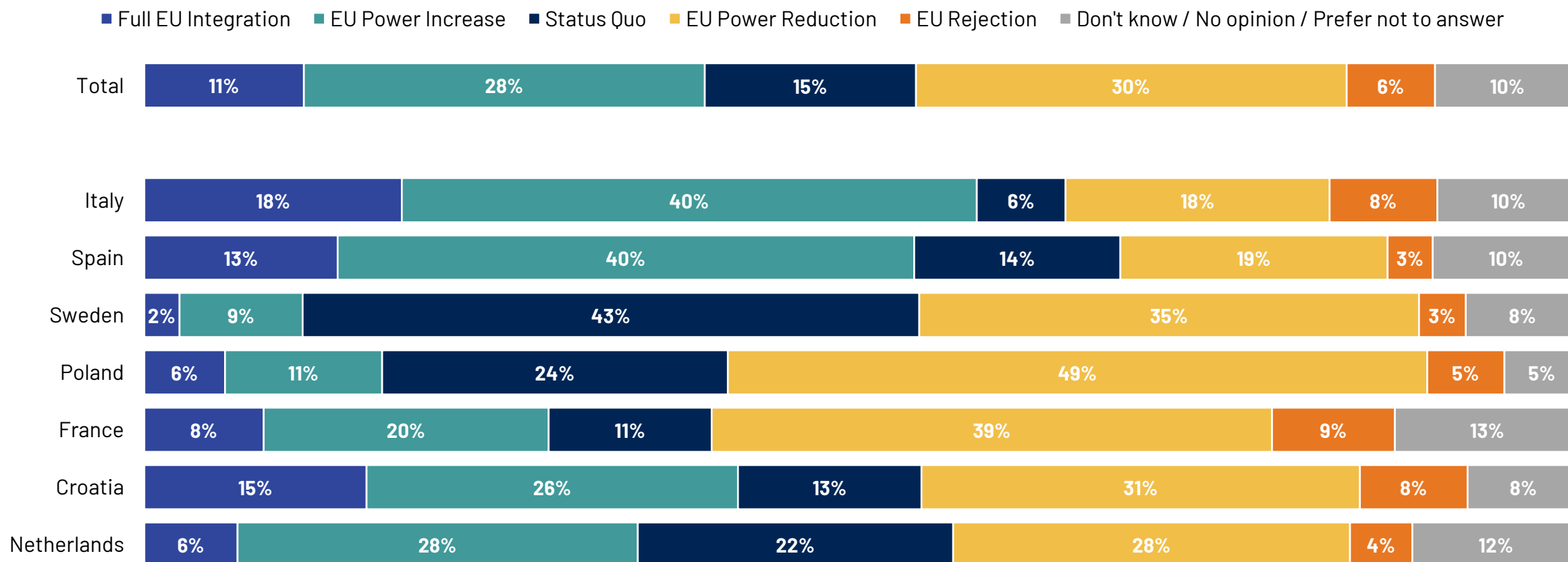
# EU in 2035



Which of the following most closely reflects your view of how the European Union (EU) **should** look by 2035?

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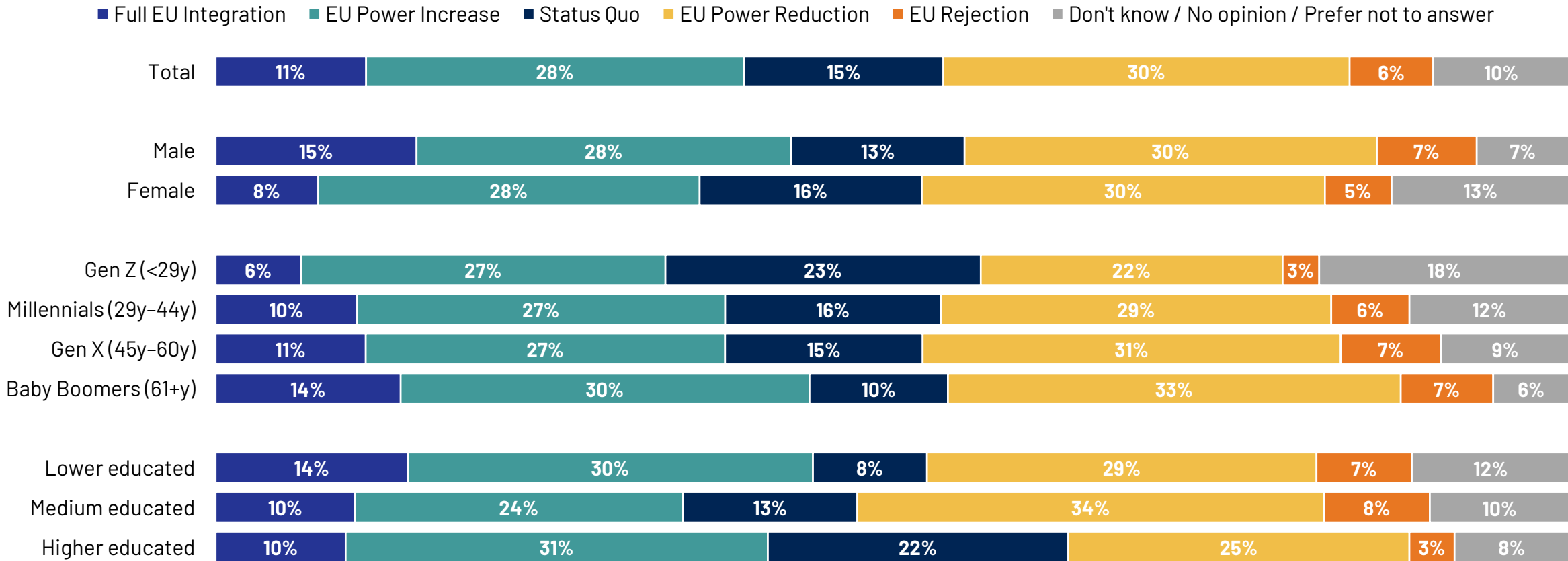
# EU in 2035 by Country



Q16. Which of the following most closely reflects your view of how the European Union (EU) **should** look by 2035?

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# EU in 2035 by Socio-Demographics



Which of the following most closely reflects your view of how the European Union (EU) **should** look by 2035?  
Base=6121

# ABOUT EUROPULSE

# Ipsos EuroPulse

These findings are based on data from the first wave of the EuroPulse survey, conducted April 11th to 22nd 2025, using nationally representative probability samples from KnowledgePanel®.

The results are based on interviews of over 6,000 adults aged 18+ y.o. in Croatia, France, Italy, the Netherlands, Poland, Spain and Sweden. The study was conducted in the official language of each European country. Two reminder emails were sent for this study. No prenotification was sent for this study prior to fieldwork.

For each country, the data were weighted to adjust for unequal probabilities of selection. Additionally, calibration weights were applied to match the profile of the respective country population. For the Europe average, data were weighted to the population size of the respective countries included.

All polls are subject to a wide range of potential sources of error.

Base sizes: Adults aged 18+, Croatia =761, France =1037, Italy = 1019, Netherlands = 987 , Poland = 757, Spain = 542, Sweden = 1018.

# Ipsos KnowledgePanel®

KnowledgePanel® is Ipsos' random probability panel and a source of statistically-valid, nationally representative data at speed. Recruitment process for the KnowledgePanel® employs scientifically developed sampling methodologies.

In Croatia, France, Italy, panelists are recruited via random probability telephone-based sampling method. Telephone numbers are randomly generated using an algorithm that conforms to the properties of valid phone numbers in a country to obtain a representative sample of the country population. A dual frame design ensures coverage of households with only a landline phone and maximises contact with dual phone owners. People are called for the short recruitment survey.

In the Netherlands, Poland, Spain and Sweden panelists are recruited via address-based sampling methods using databases with full coverage of the population:

- BAG, the official cadaster register in the Netherlands,
- Catastro inmobiliario, the official cadaster register in Spain,
- SPAR, the Swedish state personal address register in Sweden,
- and the Delivery Sequence File of the USPS in the U.S.

In these countries, letters are sent to selected individuals or addresses inviting them to become members of the panel. Invited persons can sign up to the panel by completing a short online survey or by returning a paper form.

Those who join the panel and who are selected to participate in a survey are sent a unique log-in and are only able to complete it one time. KnowledgePanel members receive a per survey incentive in points, which can be redeemed for cash or prizes.



# EuroPulse

The voice of Europe

Your research solution, designed to capture the voice of people across Europe via our Ipsos online probability panel.

## What we promise

**Min 5,000** interviews across 7 EU Member States, 18+ incl. hard-to-reach groups and digitally-excluded

## At what cost\*

**5,000 €**

1 Question Unit

**25,000 €**

5 QU + **1 QU free**

**50,000 €**

10 QU + **3 QU free**

## What you get

Ipsos EuroPulse covers questionnaire co-creation, scripting, translation, fieldwork, and delivers clean, weighted data with standard tabulations and graphs.

## How it works

Simple and fast. Submit your questions via email to **EuroPulse@ipsos.com** by the first Monday of each month, with results available the week thereafter.

## Questions?

Any question, or need something more bespoke? Reach out to **EuroPulse@ipsos.com** and let's discuss!

## About Ipsos

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Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarizes our ambition to help our 5,000 clients to navigate more easily in our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

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## About European Public Affairs

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Ipsos Public Affairs is the largest of the company's service sections and responsible for providing social and public opinion research, communication, advisory and evaluation services to clients in the public sector and beyond.

Supported by established products and backed by a global network of Ipsos experts, we are uniquely designed to help support the needs of the public and private sectors, agencies, organisations, and governments. We use Ipsos' powerful, integrated global network and latest state of the art survey tools, systems and processes. International research is conducted to the highest standards of methodological rigour through central teams and experts within the countries. We have a solid track record of successfully delivering large scale, multi-country solutions for a range of clients, from governments, inter-governmental organisations international institutions, through to NGOs and leading academic institutions.

The **Ipsos European Public Affairs team** specialises in pan-European and international survey research. We help senior policy and decision makers in Europe understand public and business opinion and behaviours in relation to a wide range of policy issues. We are focused on delivering robust evidence and insights to inform policy, strategy and communications to our clients.

# THANK YOU

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