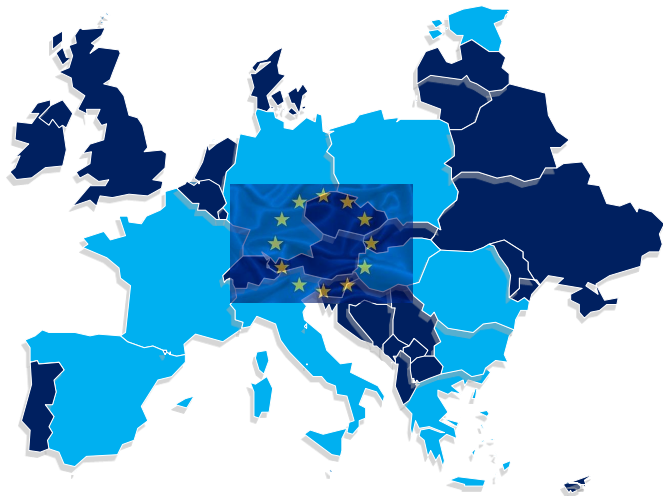


MAY 2024 | 10-COUNTRY COMPARATIVE SURVEY

# EU's Pressing Challenges

What Europeans consider ahead of  
the 2024 EU Parliament Elections

Findings Report



# Kapa Research EU10-country Comparative Survey, 2024

This study goes beyond national voting intentions and domestic dilemmas. It traces trends formed in European societies over the five-year period 2019-2024 that shaped Europe's social agenda. It includes views and concerns on pressing challenges in Europe, expectations from the new EU leadership, and opinions about leaders of the modern world.

We interviewed 10,883 adults (18+) eligible to vote in 10 representative EU member states – **Bulgaria, Estonia, France, Germany, Greece, Hungary, Italy, Poland, Romania, and Spain** – between 4 and 24 May 2024. (See appendices for details).

This special report contains a summary of the key findings, alongside a detailed data report of the survey. Full breakdowns of findings for each country are also provided.



# Key Findings

**# 1** Rising cost of living, immigration, and the Russia-Ukraine conflict constitute Europeans' main concerns, as we head towards the 2024 EU Parliament Election. In addition, EU citizens express wide distress about the corrosive role of fake news, economic inequalities, the Union's environmental policy, and the use of AI.

**# 2** Widespread demand for control over the cost of living and the hyper-concentration of wealth among the few. The recent interplay between several crises (2010s financial crisis, COVID-19, war conflicts, energy crisis, and inflation) has established a lingering feeling that “in Europe, the rich are getting richer, and the poor are getting poorer”.

**Key takeaway** Europe’s history, culture, and values are greater than its material wealth. This dichotomy between material and cultural capital has led to two different approaches of the European project: the “technocratic” approach versus a more “political” approach. It turns out that the prevalent technocratic approach increases citizens’ distrust on whether the new leadership will respond to their concerns. The majority, in response, requests strengthening of the European *acquis* (security, freedom, democracy, growth, social cohesion).

**# 3** Universal call for peace in Ukraine and an end to the war in Gaza. To this end, as the feeling of danger from wars and terrorism grows stronger, EU-UK relations become directly connected to the issue of security: 56% of the respondents wish for a (re)alignment among Great Britain and the EU. At the same time, and compared to current leaders, Tony Blair enjoys high popularity ratings.

**# 4** The triptych *Democracy - Human Rights - Rule of Law* prevails over *Order - Security - Strong Leadership*. The contradiction between these two value systems highlights a new division between countries and leaders that embrace democratic ideals and those that lean towards authoritarianism competing, often unfairly, with the Union.

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## SECTION 1: Main concerns when thinking of Europe

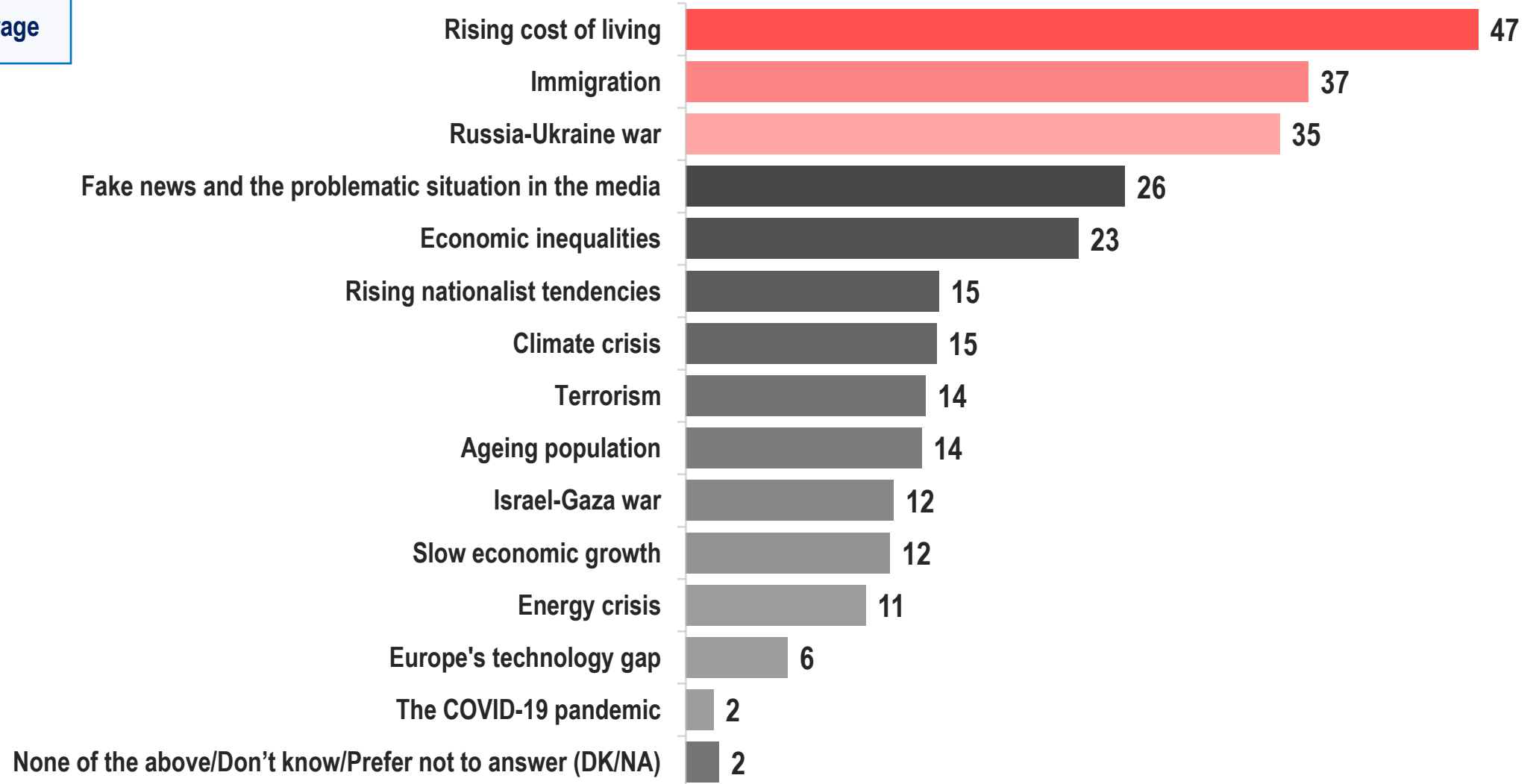
- Cost of living – Immigration – War conflicts
- In which areas should Europe focus on in the next 5 years?
- More or less intervention of the EU in member-states?
- Appeal of another von der Leyen term as head of the Commission

# MAIN CONCERNS WHEN THINKING OF EUROPE

Q. When you think about Europe and international developments, which of the following issues or events worry you the most?

UP TO 3 CHOICES

% 10-country average



# MAIN CONCERNS WHEN THINKING OF EUROPE – BY COUNTRY

Q. When you think about Europe and international developments, which of the following issues or events worry you the most?

UP TO 3 CHOICES

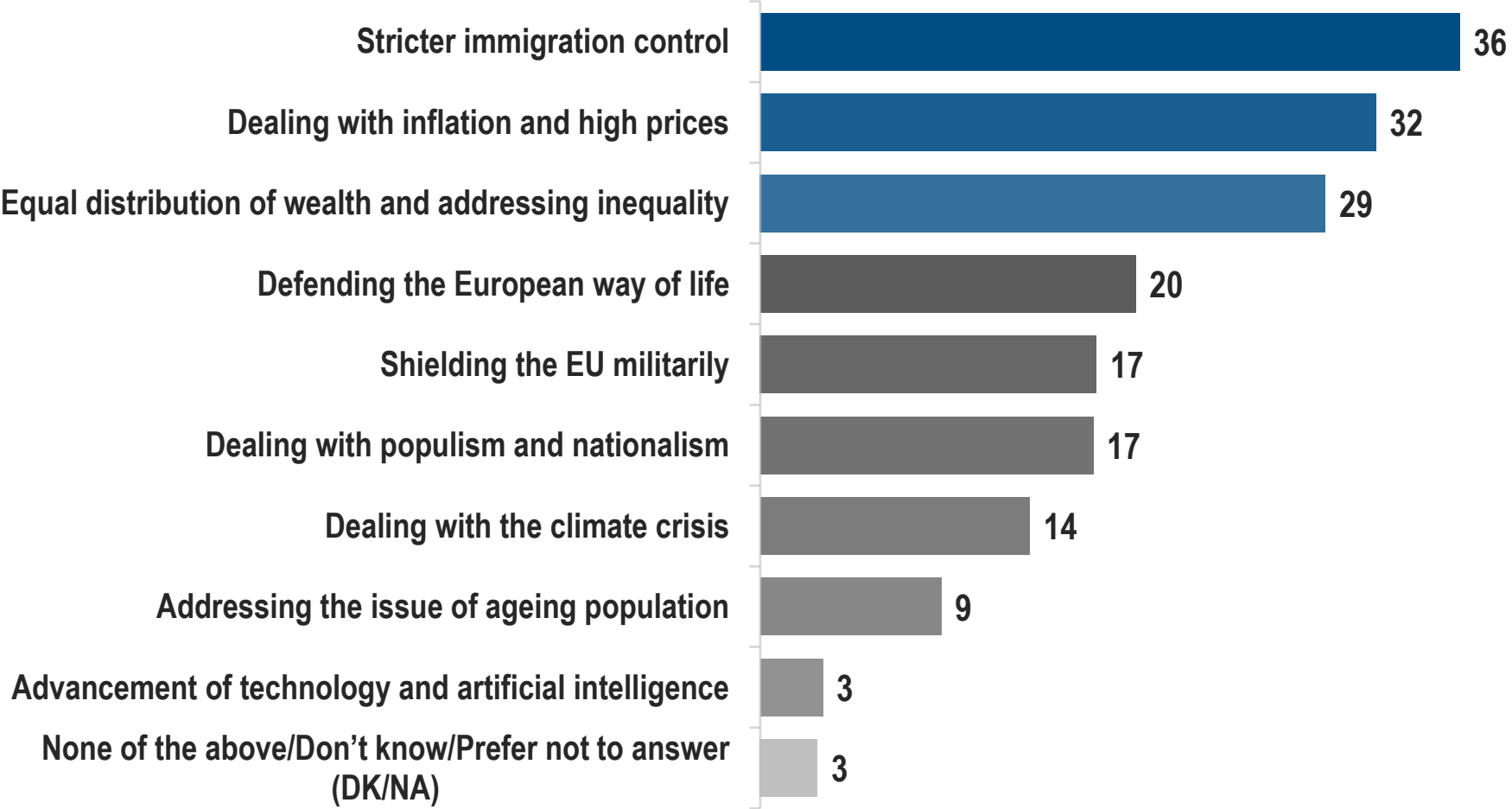
<b>% (Top 3 highlighted)</b>	<b>10-country average</b>	Bulgaria	Estonia	France	Germany	Greece	Hungary	Italy	Poland	Romania	Spain
Rising cost of living	<b>47</b>	<b>44</b>	43	<b>58</b>	48	<b>55</b>	42	37	36	<b>54</b>	<b>49</b>
Immigration	<b>37</b>	28	45	38	<b>56</b>	34	35	<b>40</b>	41	16	34
Russia-Ukraine war	<b>35</b>	36	<b>52</b>	23	21	17	<b>50</b>	33	<b>50</b>	43	25
Fake news and the problematic situation in the media	<b>26</b>	25	35	24	19	26	28	22	26	26	26
Economic inequalities	<b>23</b>	25	23	26	12	32	22	31	10	23	28
Rising nationalist tendencies	<b>15</b>	15	5	16	10	21	17	18	21	11	15
Climate crisis	<b>15</b>	8	7	17	17	24	16	15	20	9	15
Terrorism	<b>14</b>	11	12	22	21	10	16	10	12	11	17
Ageing population	<b>14</b>	24	13	2	3	26	10	14	13	19	14
Israel-Gaza war	<b>12</b>	9	5	11	11	18	7	21	8	7	24
Slow economic growth	<b>12</b>	13	19	10	18	12	9	12	6	12	9
Energy crisis	<b>11</b>	13	14	10	16	11	6	6	18	7	4
Europe's technology gap	<b>6</b>	5	8	8	10	6	3	9	3	5	5
The COVID-19 pandemic	<b>2</b>	1	2	1	4	1	1	1	2	2	1
None of the above/ I do not know/ I do not wish to answer	<b>2</b>	2	1	1	1	0	4	3	1	2	3

# AREAS OF FOCUS FOR EUROPE IN THE NEXT FIVE YEARS

Q. In the next five years, which of the following areas do you think Europe should focus on?

UP TO 2 CHOICES

% 10-country average



# AREAS OF FOCUS FOR EUROPE IN THE NEXT FIVE YEARS – BY COUNTRY

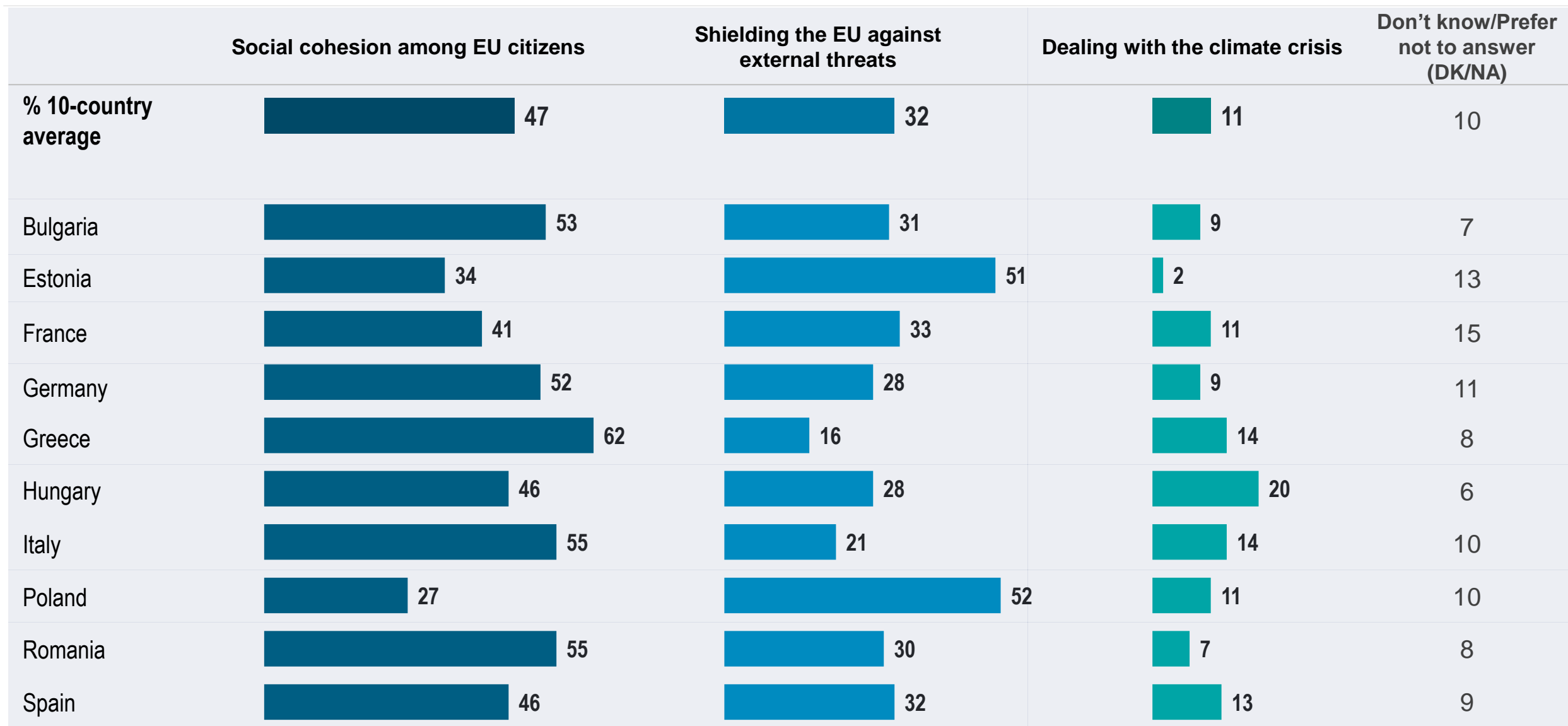
Q. In the next five years, which of the following areas do you think Europe should focus on?

UP TO 2 CHOICES

<sup>%</sup> (Top 3 highlighted)	10-country average	Bulgaria	Estonia	France	Germany	Greece	Hungary	Italy	Poland	Romania	Spain
Stricter immigration control	36	41	53	36	40	26	33	41	33	26	32
Dealing with inflation and high prices	32	21	41	42	35	43	23	30	24	23	37
Equal distribution of wealth and addressing inequality	29	31	17	30	22	35	34	29	15	42	33
Defending the European way of life	20	16	17	26	26	19	19	25	13	13	22
Shielding the EU militarily	17	14	34	13	6	11	23	11	45	11	8
Dealing with populism and nationalism	17	18	5	12	14	16	27	15	26	18	22
Dealing with the climate crisis	14	7	6	10	17	21	21	16	17	11	16
Addressing the issue of ageing population	9	20	12	2	1	18	8	8	5	14	6
Advancement of technology and artificial intelligence	3	5	3	2	1	3	4	4	1	5	4
None of the above/I do not know/ I do not wish to answer	3	4	3	4	1	1	1	4	3	7	2

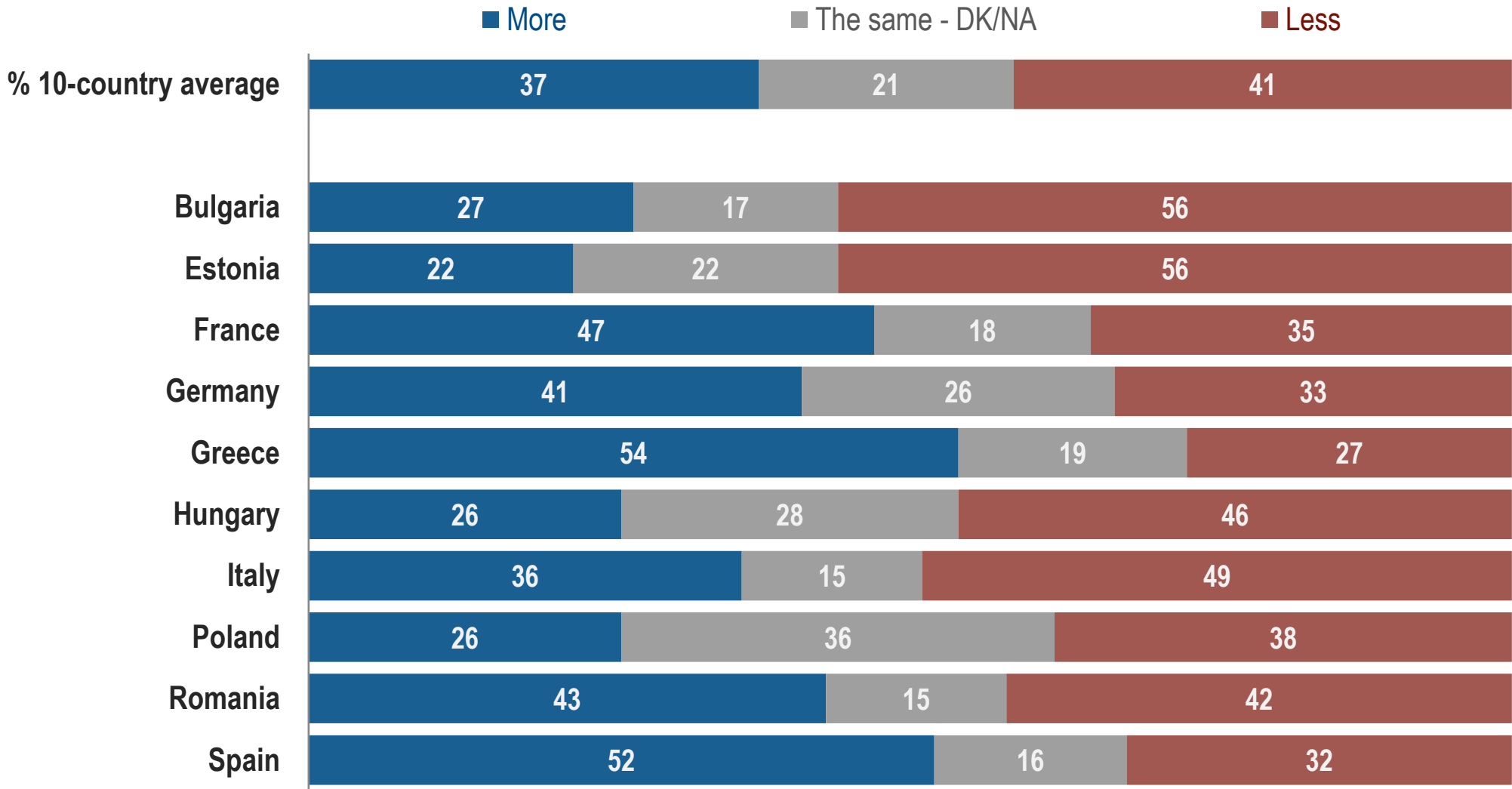
# HOW CITIZENS WOULD MANAGE THE EU BUDGET

Q. If you were in control of the EU budget, which area would you allocate more resources to?



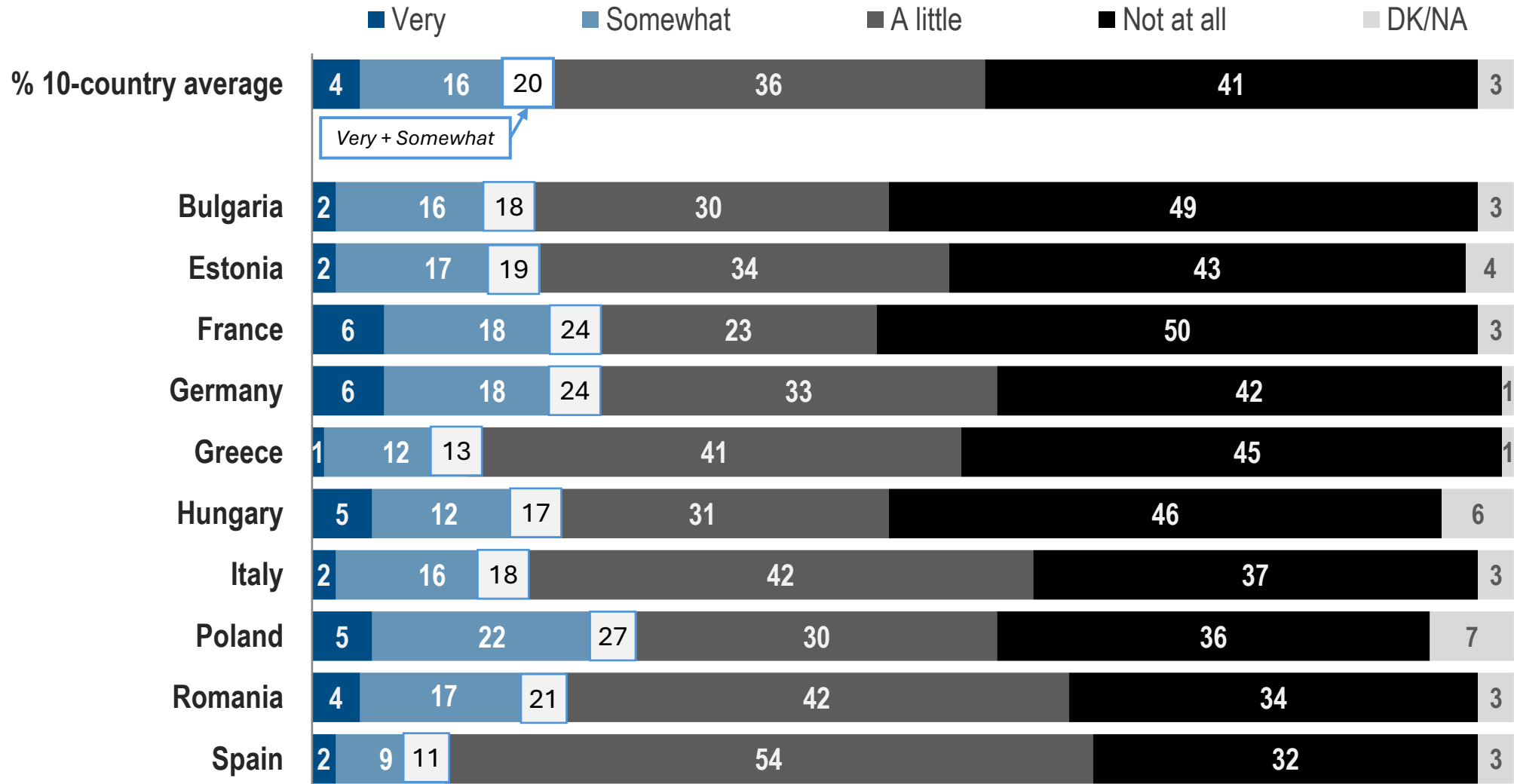
# MORE OR LESS INTERVENTION OF THE EU IN MEMBER-STATES?

Q. Making an overall assessment of the crises Europe has faced in recent years (economy, pandemic, energy), would you want more intervention or less intervention by the European institutions in national societies and economies?



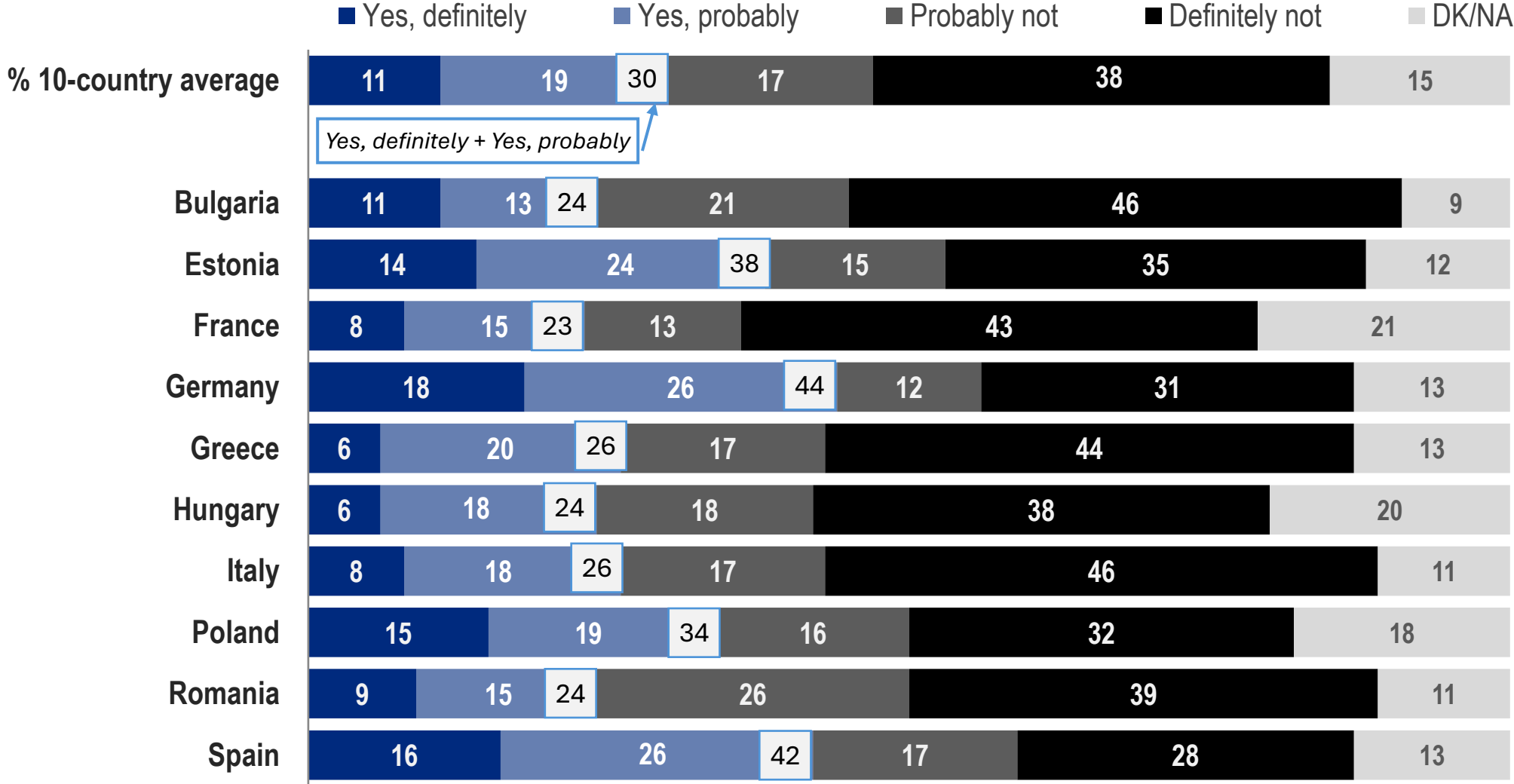
# DEGREE OF OPTIMISM THAT EUROPEAN LEADERSHIP WILL MEET CITIZEN PRIORITIES

Q. How optimistic are you that the leadership of the European Union will respond to the priorities you set above?



# APPEAL OF ANOTHER VON DER LEYEN TERM AS HEAD OF THE COMMISSION

Q. Would you like the current president of the European Commission, Ursula von der Leyen, to be president again after the European elections in June 2024?

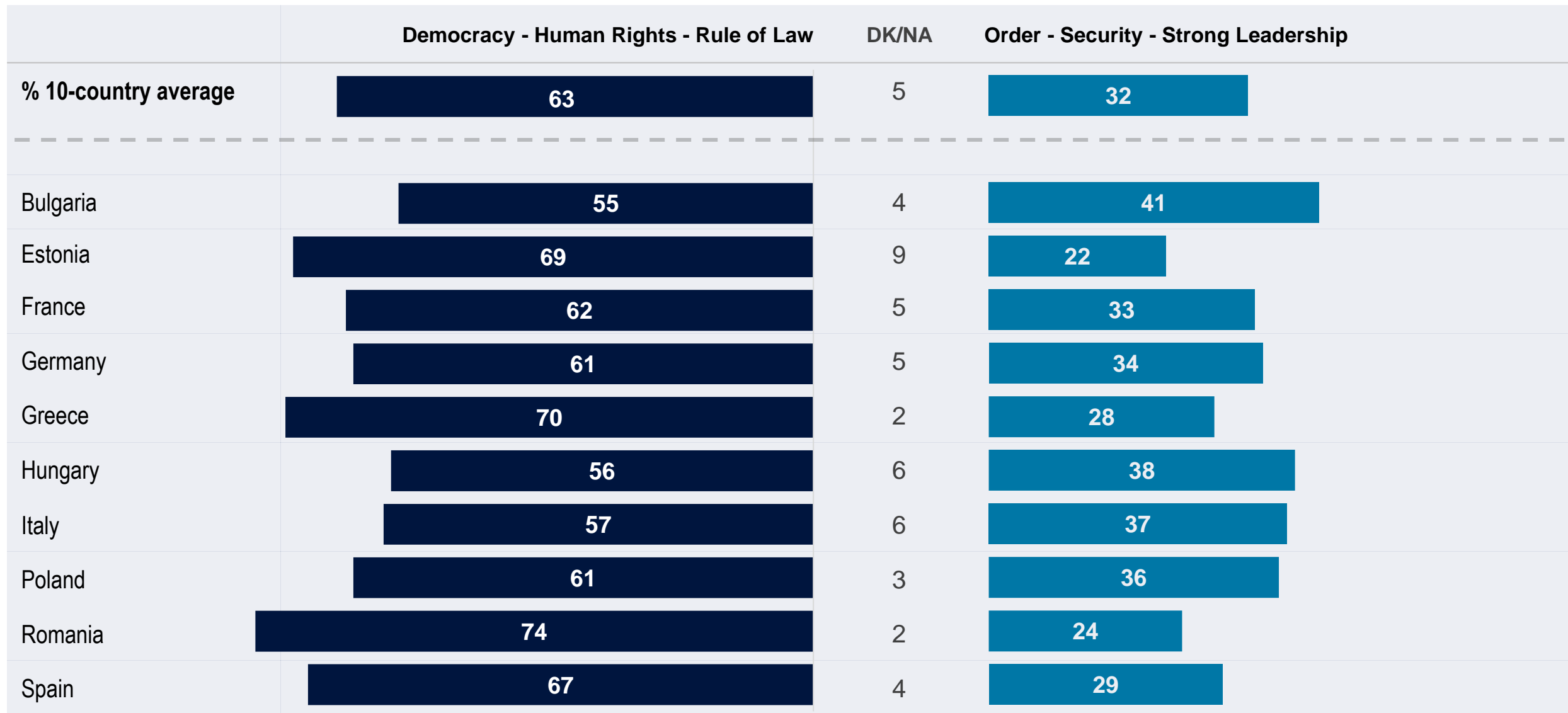


## SECTION 2: The core set of values

- ‘Democracy - Human Rights - Rule of Law’ vs ‘Order - Security - Strong Leadership’

# 'DEMOCRACY - HUMAN RIGHTS - RULE OF LAW' vs 'ORDER - SECURITY - STRONG LEADERSHIP'

Q. Which of the two sets of principles and values would you say characterizes you better?

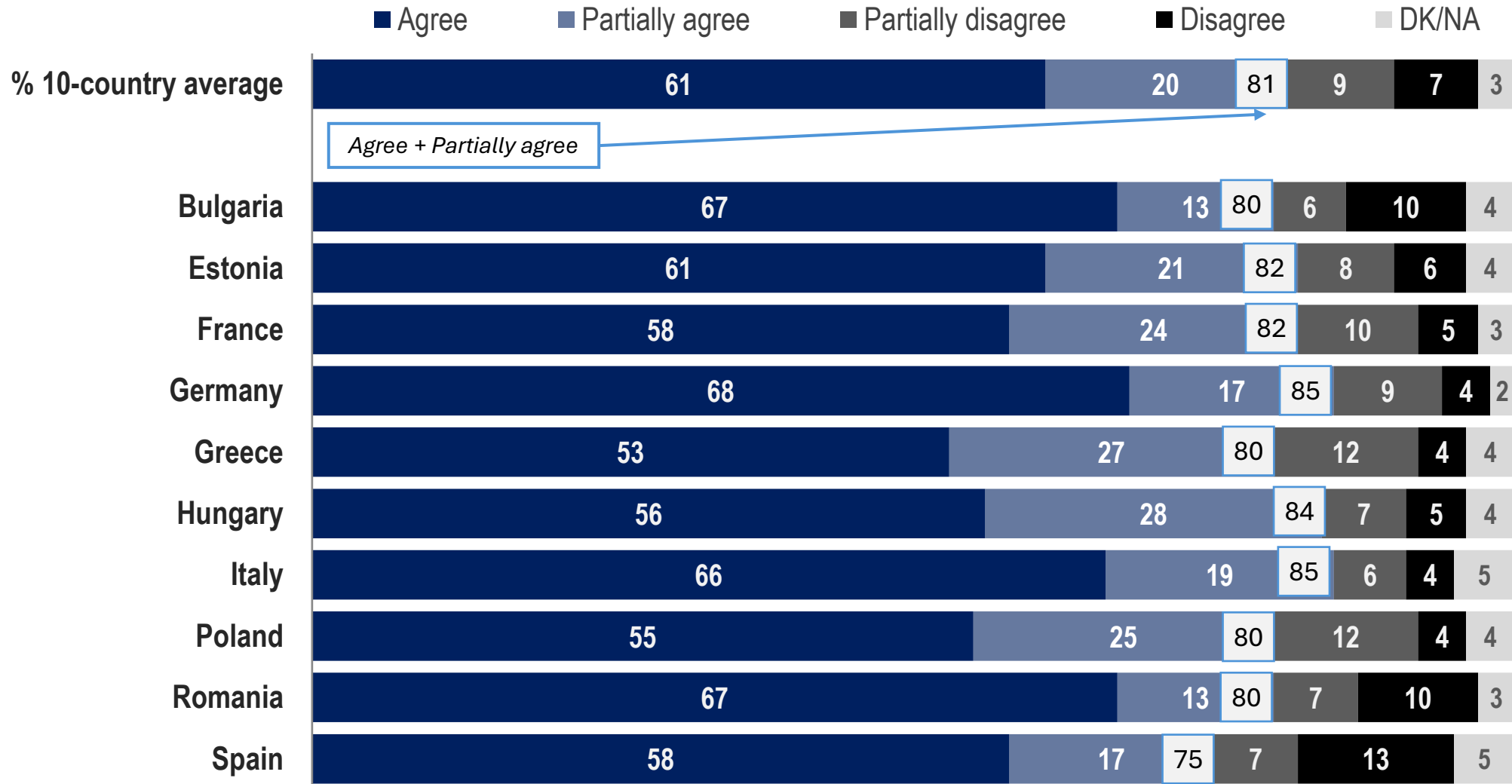


## SECTION 3: Economic inequality

- ‘In Europe the rich are getting richer, and the poor are getting poorer’

# PERCEPTION OF ECONOMIC INEQUALITY IN EUROPE

Q. Do you agree or disagree with the following sentence? "In Europe the rich are getting richer, and the poor are getting poorer"

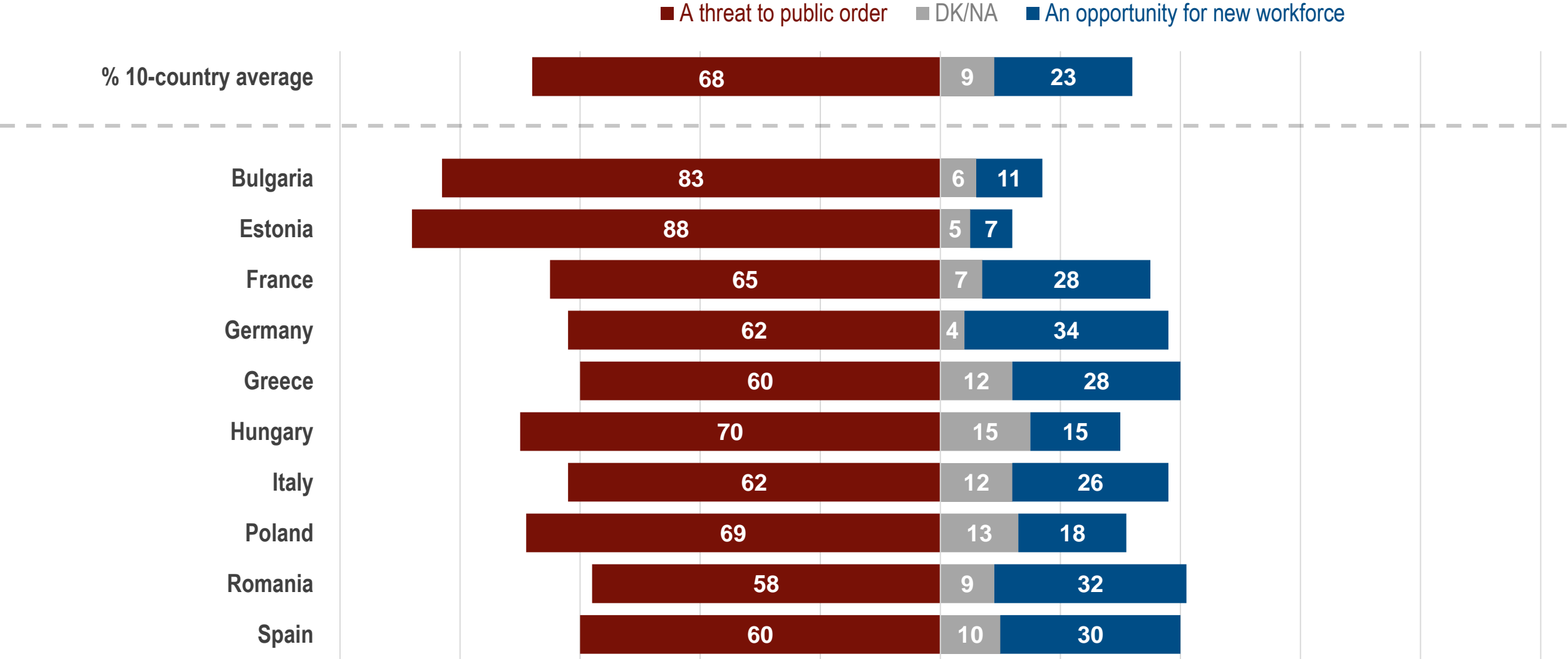


## SECTION 4: The immigration issue

- 'Opportunity for new workforce' or 'threat to public order'?

# STANCE ON THE IMMIGRATION ISSUE: OPPORTUNITY or THREAT?

Q. For you personally, migration from third countries to Europe is more...:

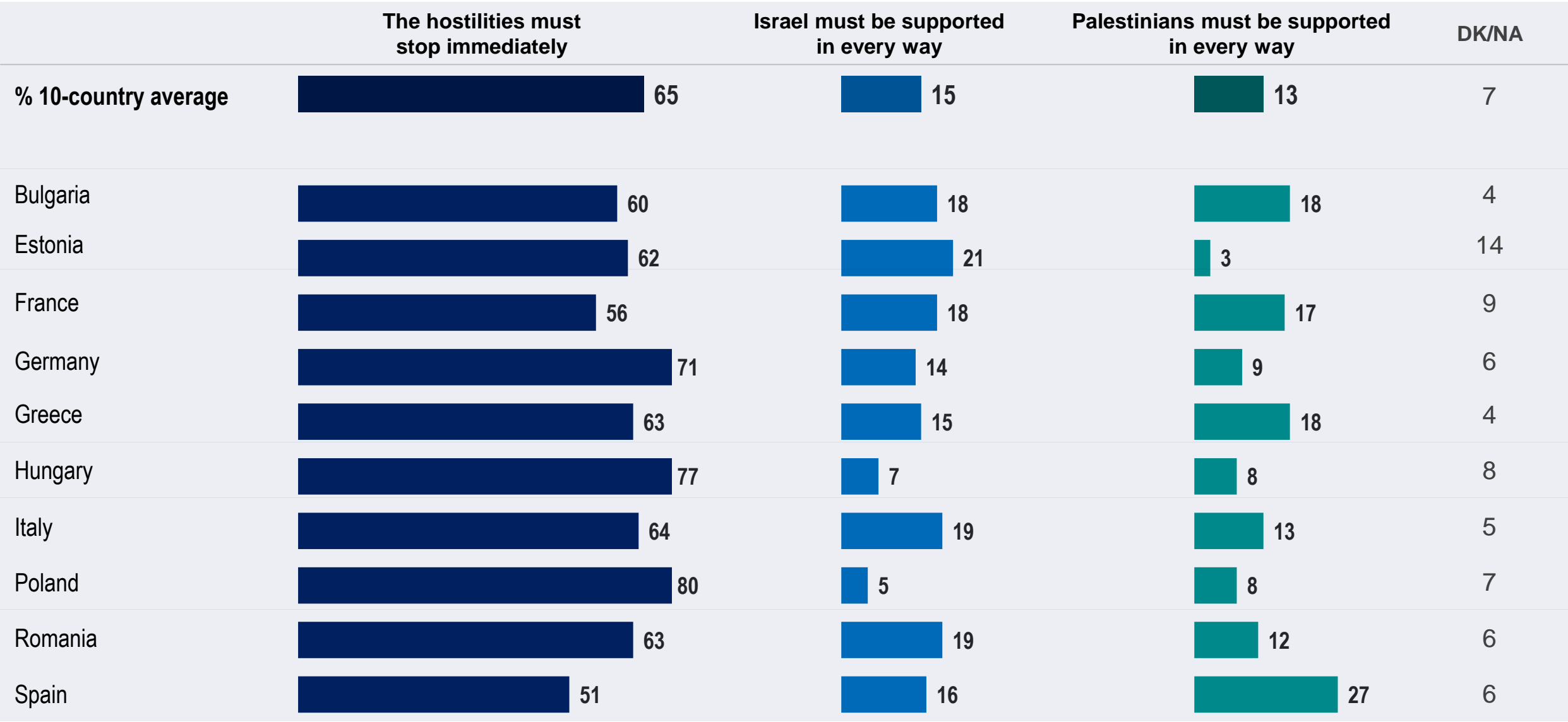


## SECTION 5: War conflicts and alliances

- Israel-Gaza war
- Russia-Ukraine war
- Appeal of a common EU army
- Preferences in EU international alliances

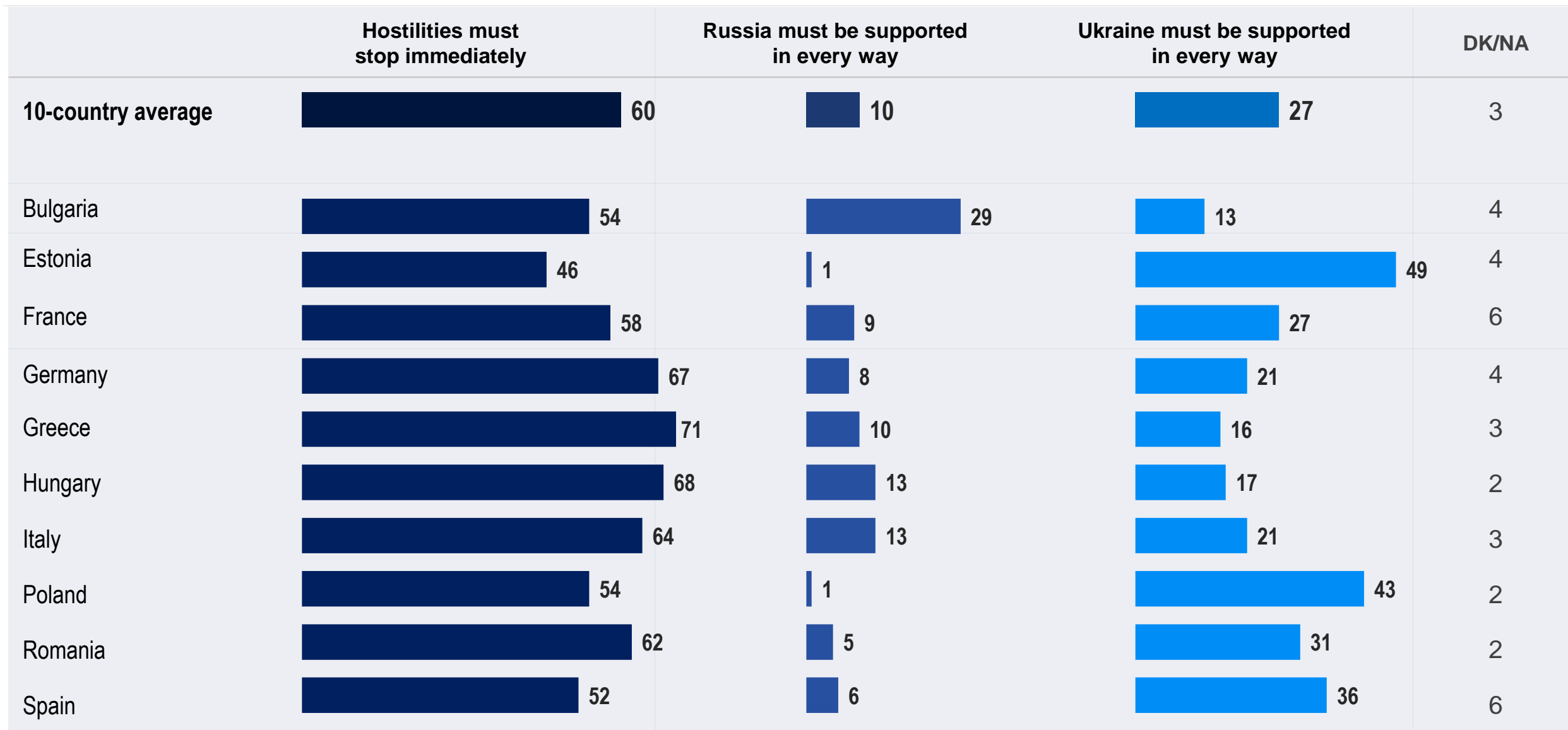
# STANCE ON THE ISRAEL-GAZA WAR

Q. Regarding the Israel-Gaza war, which opinion expresses you the most?



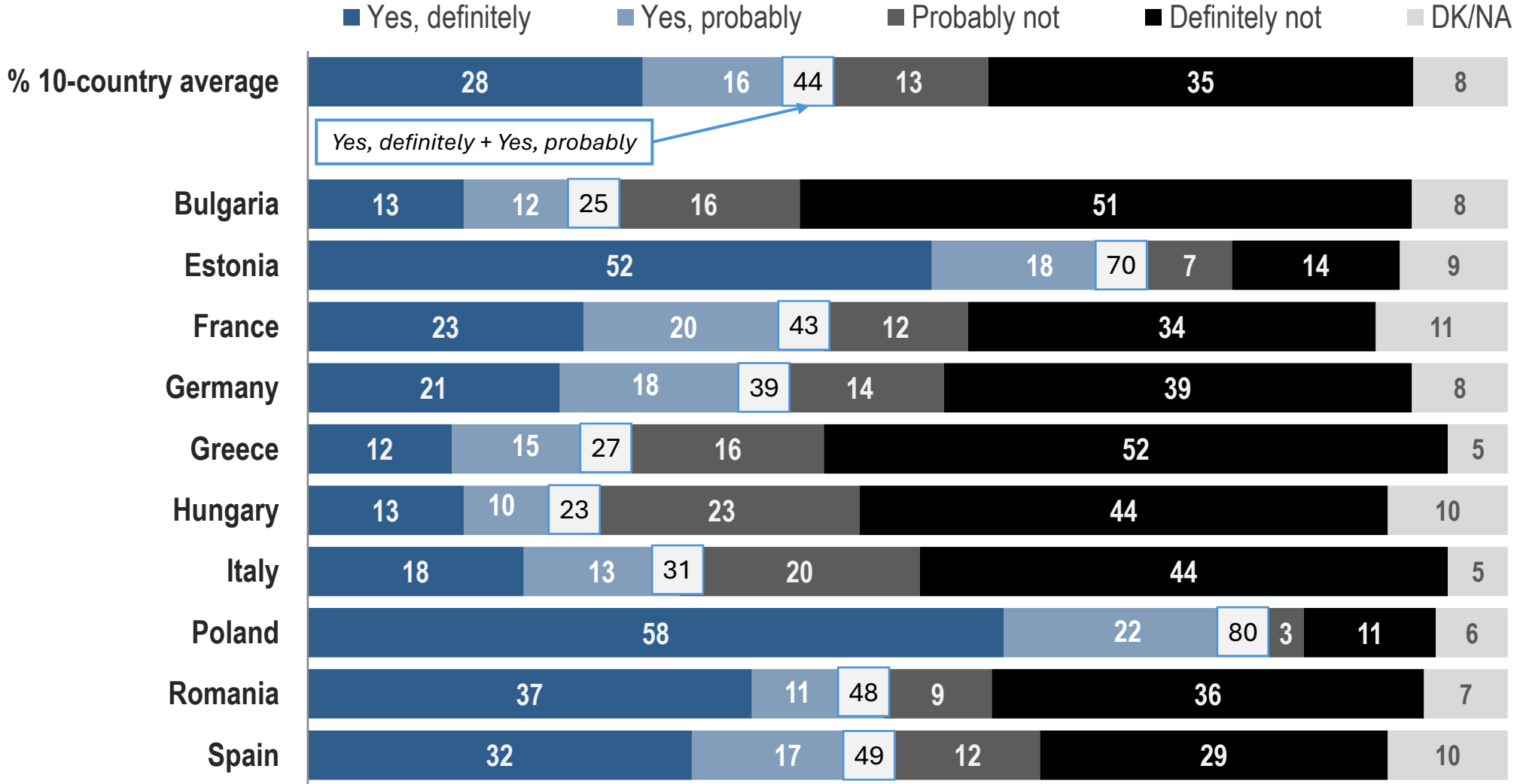
# STANCE ON THE RUSSIA-UKRAINE WAR

Q. And regarding the war between Russia and Ukraine, which opinion expresses you more?



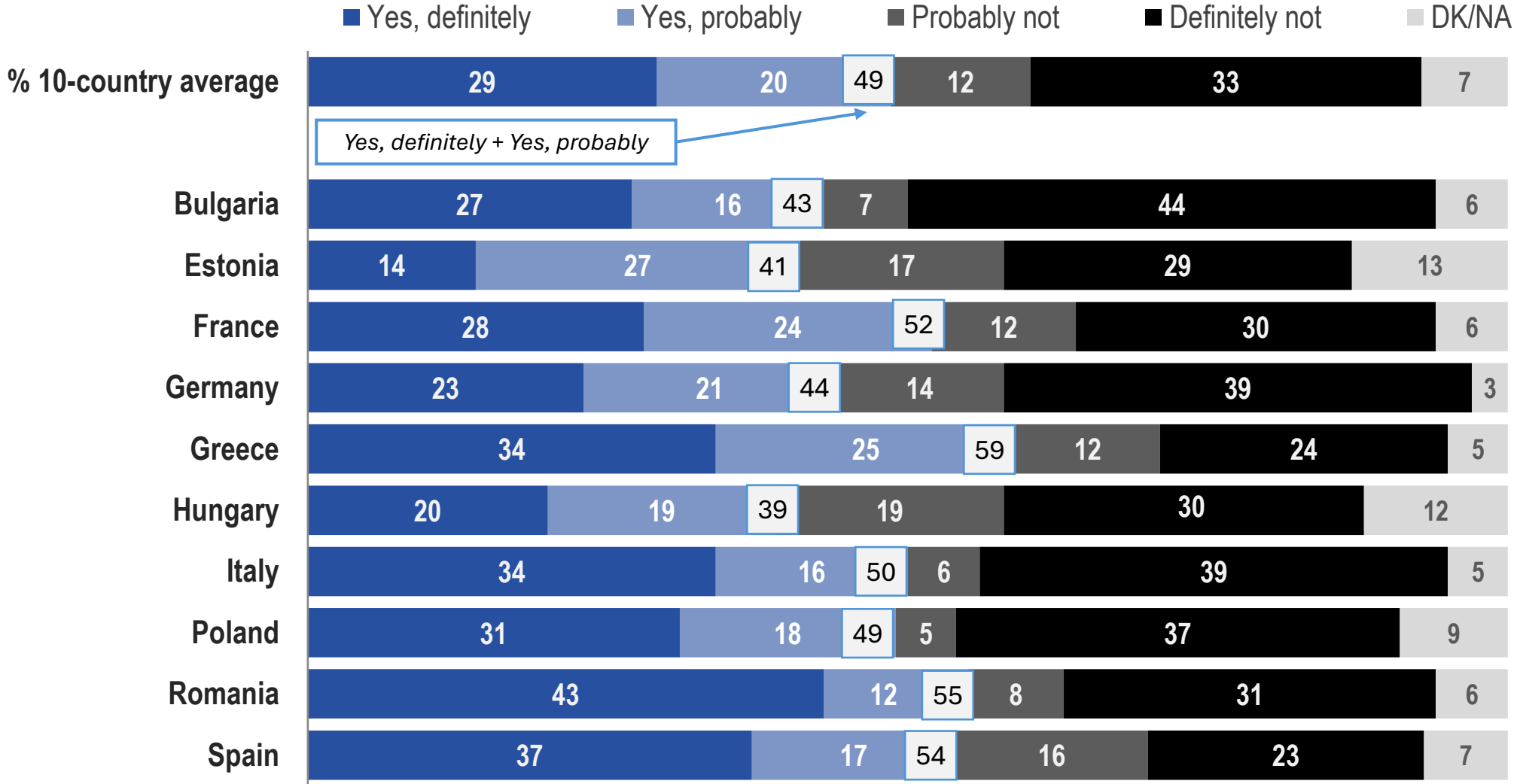
# ATTITUDE TOWARDS ADDITIONAL MILITARY AID TO UKRAINE BY EUROPE

Q. Would you like Ukraine to be further supported militarily by Europe?



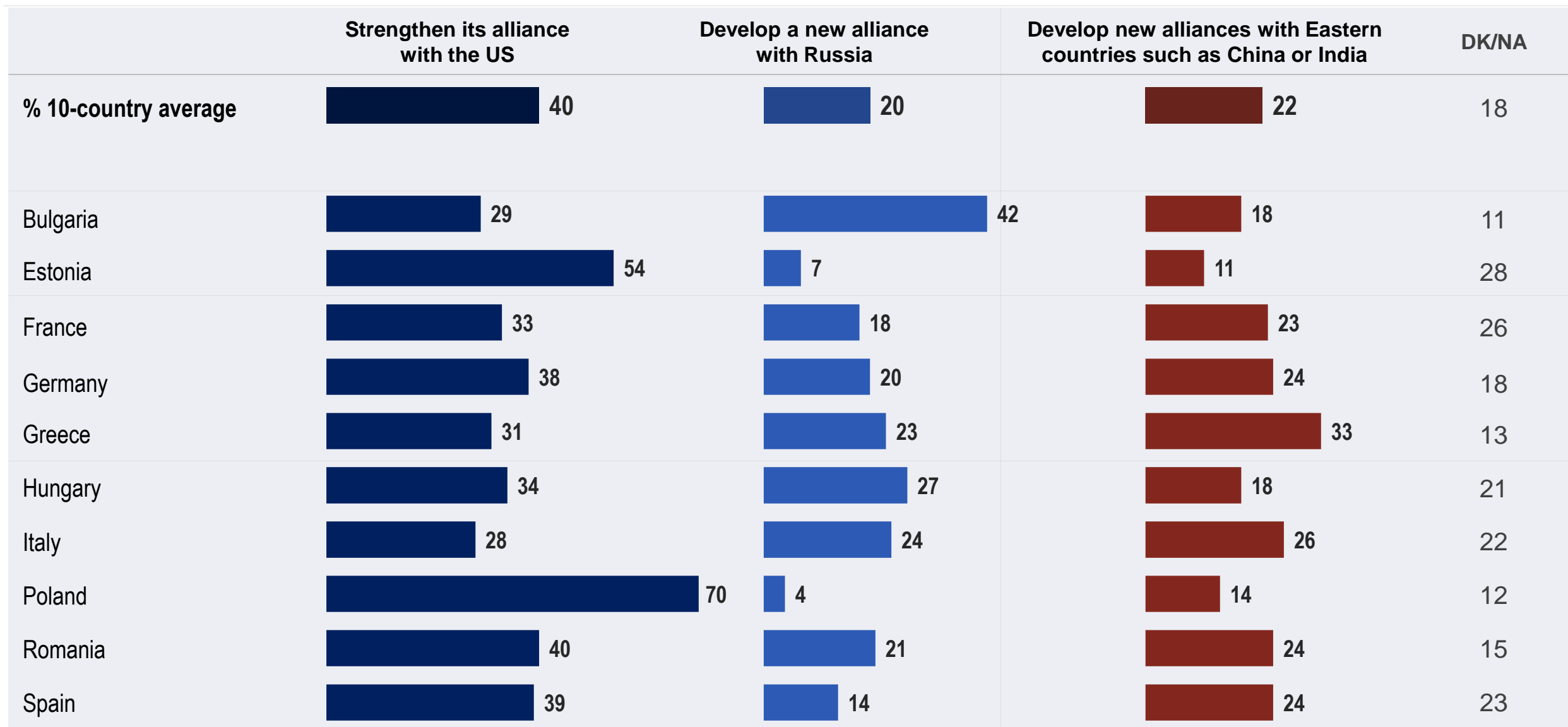
# APPEAL OF A COMMON EU ARMY

Q. Would you like to see a common EU army?



# PREFERENCES IN EU ALLIANCES: USA, RUSSIA or CHINA/INDIA?

Q. In terms of international alliances, over the next five years, do you think the EU should:



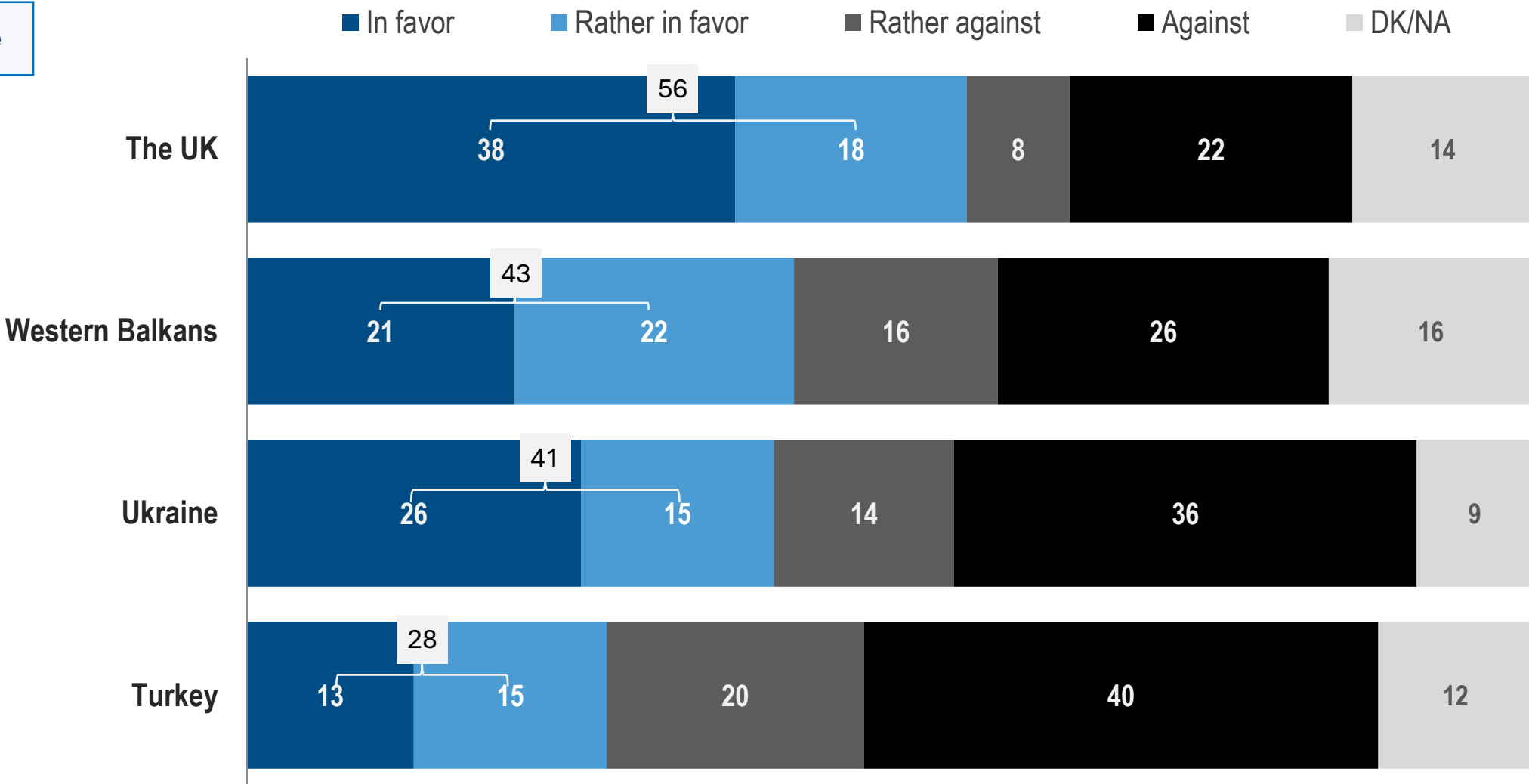
## SECTION 6: EU enlargement

- Integration of the Western Balkans, Ukraine and Turkey?
- The prospect of the UK rejoining the EU family

# ATTITUDE TOWARDS A NEW EU ENLARGEMENT

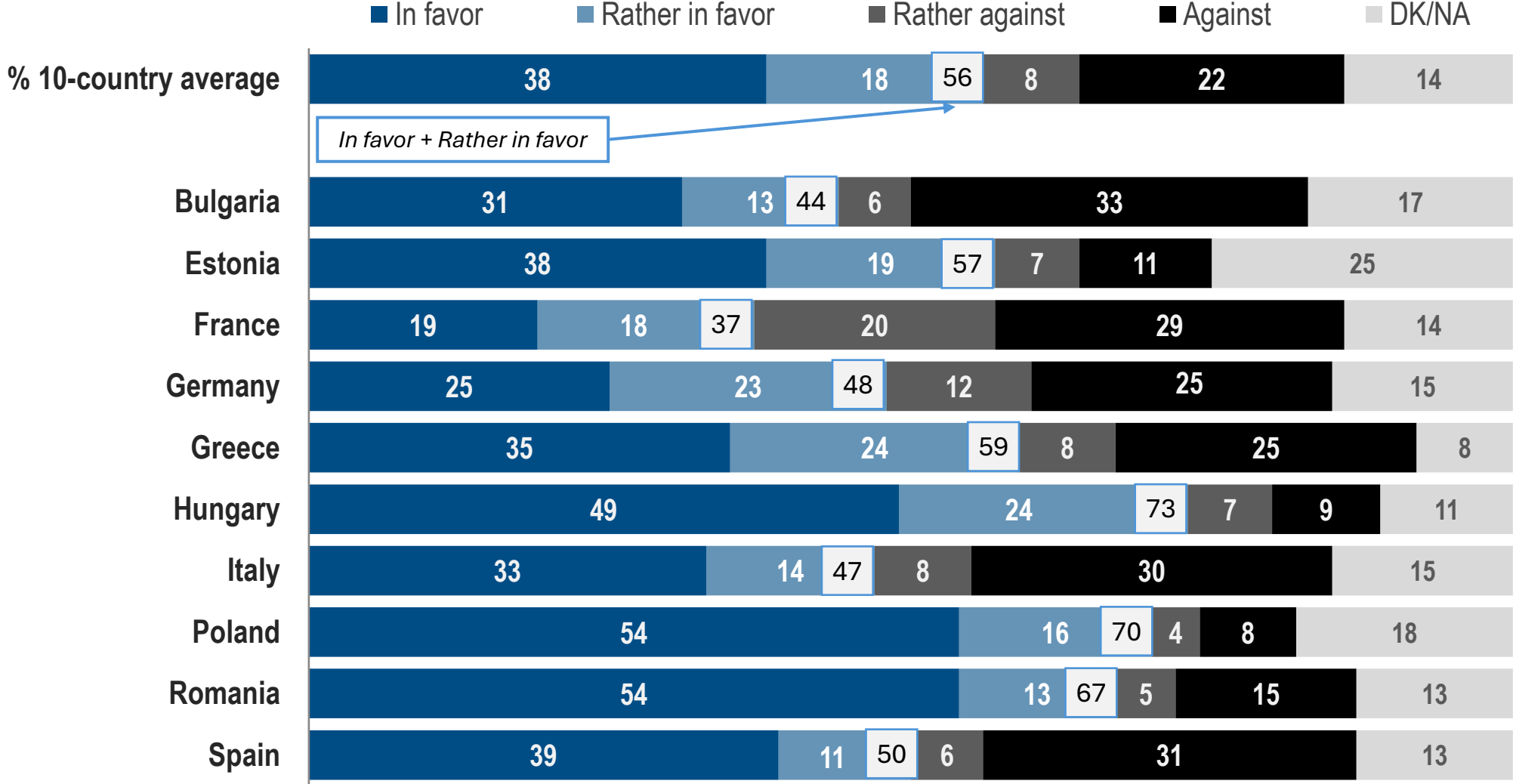
Q. Are you in favor or against for the following to join the EU:

% 10-country average



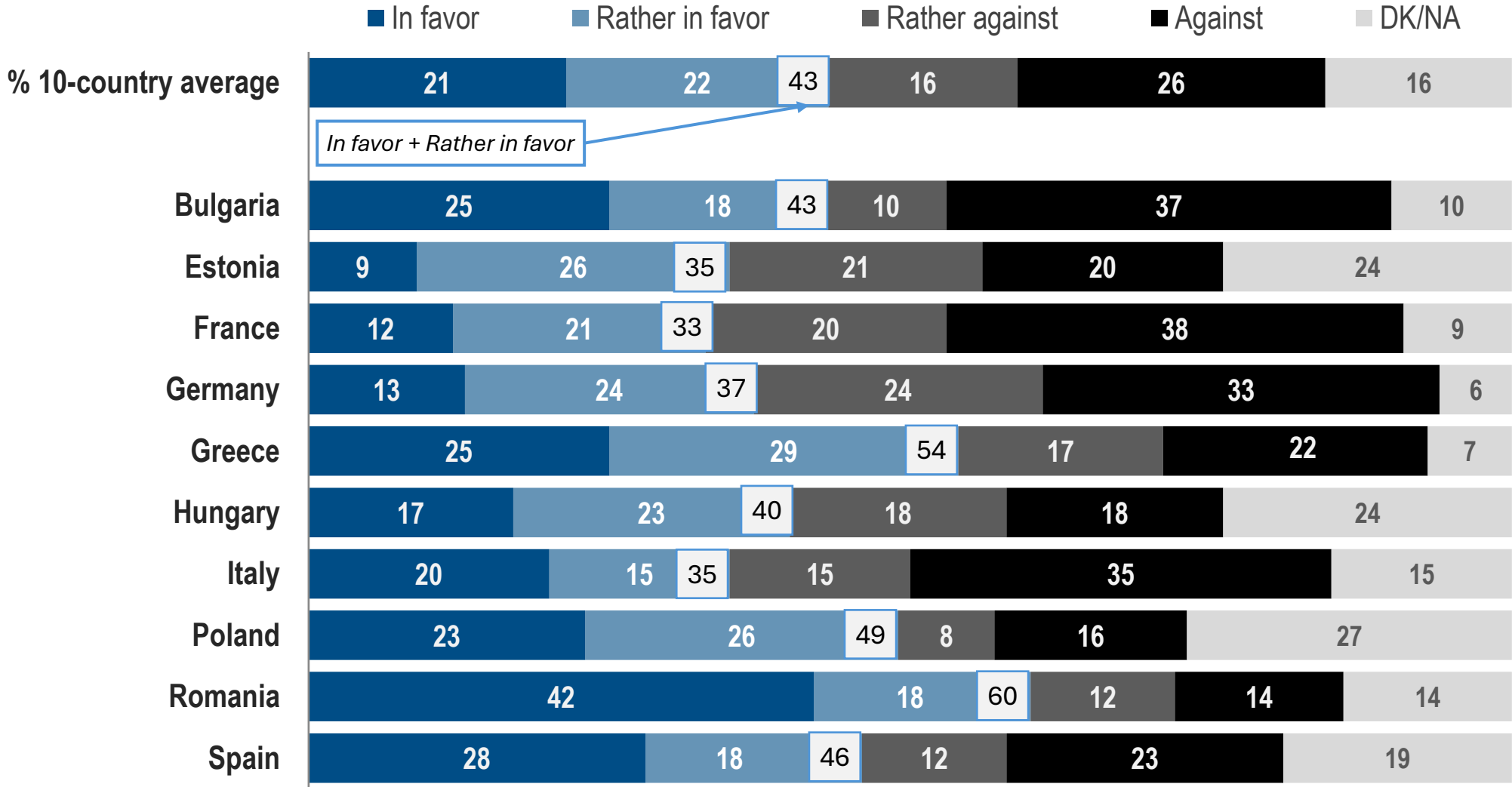
# ATTITUDE TOWARDS THE PROSPECT OF THE UK (RE)JOINING THE EU

Q. Are you in favor or against the United Kingdom joining the EU:



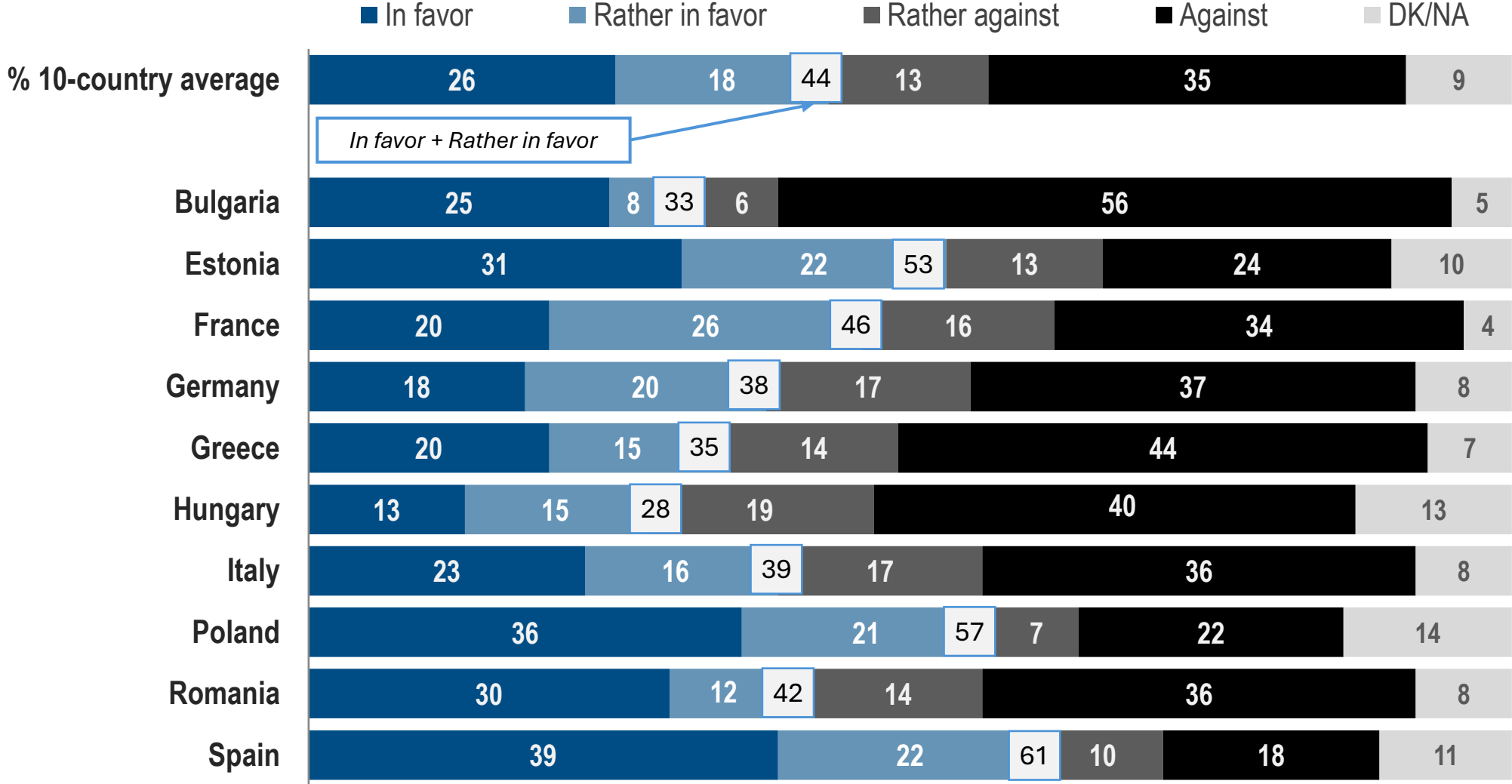
# ATTITUDE TOWARDS THE PROSPECT OF WESTERN BALKANS JOINING THE EU

Q. Are you in favor or against the integration of the Western Balkans into the EU:



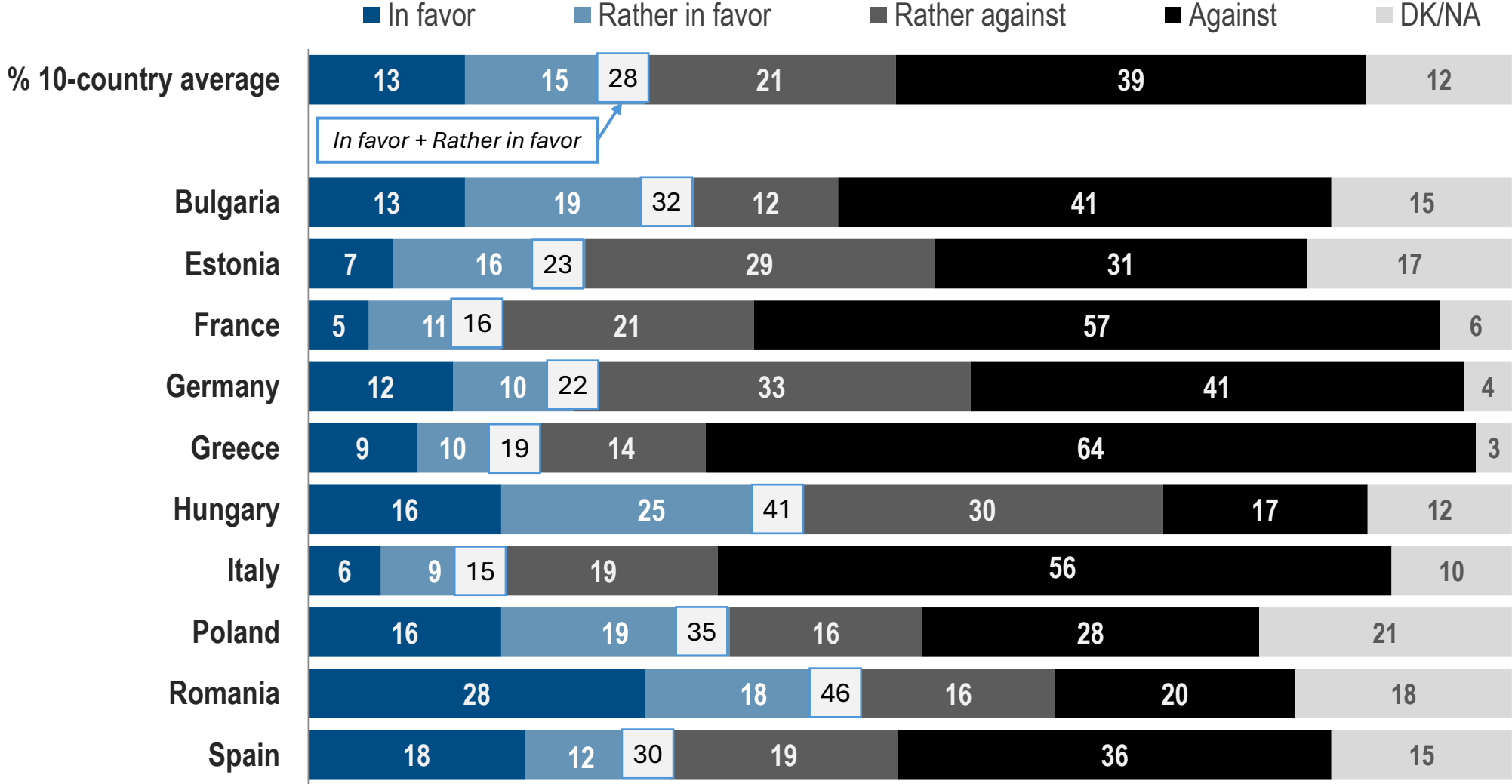
# ATTITUDE TOWARDS THE PROSPECT OF UKRAINE JOINING THE EU

Q. Are you in favor or against Ukraine joining the EU:



# ATTITUDE TOWARDS THE PROSPECT OF TURKEY JOINING THE EU

Q. Are you in favor or against Turkey joining the EU:

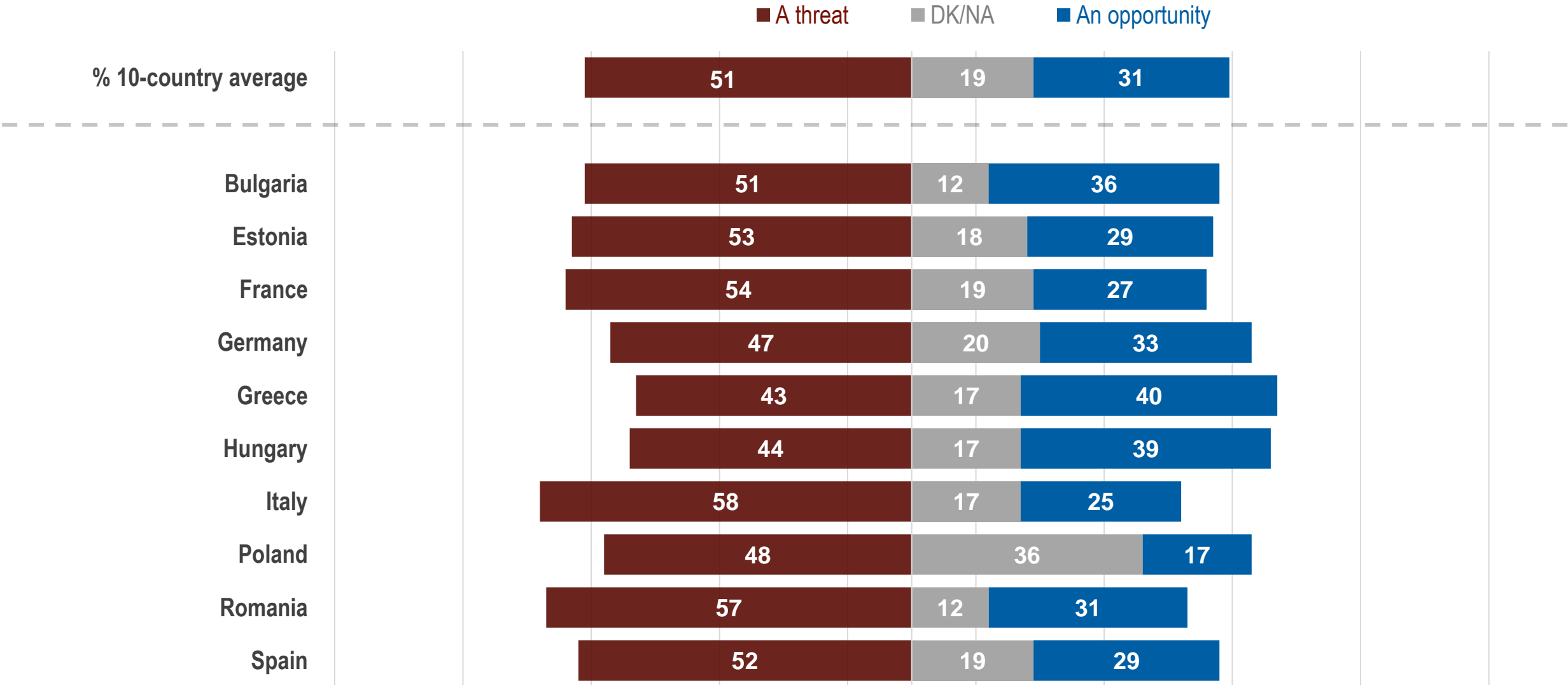


## SECTION 7: Artificial Intelligence

- 'Threat' or 'opportunity'?
- Should the EU invest in AI in the next five years?

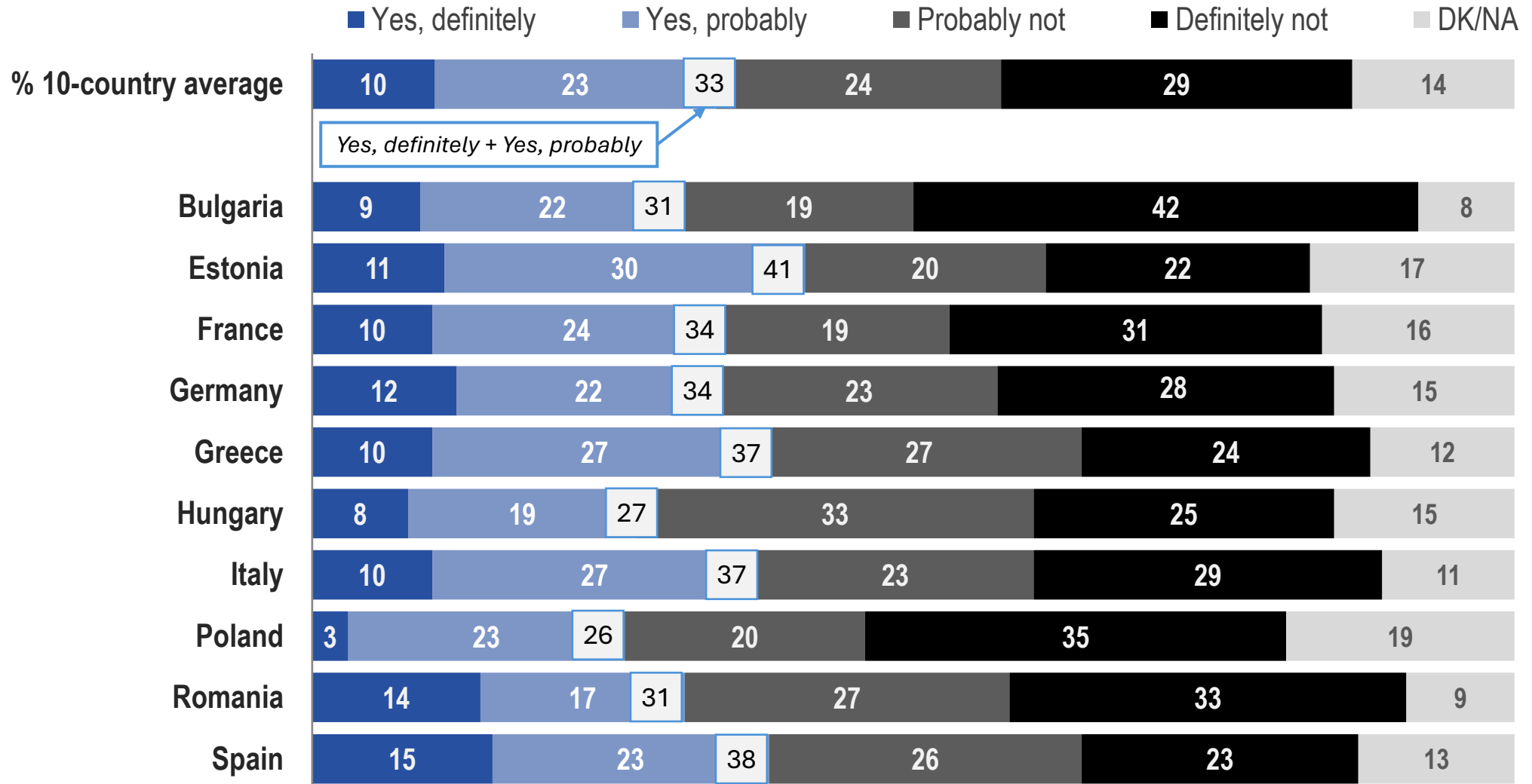
# OPINION ON ARTIFICIAL INTELLIGENCE

Q. In your opinion, for humanity Artificial Intelligence is more of:



# SHOULD INVESTING IN AI BE A STRATEGIC GOAL OF THE EU?

Q. Do you think EU investment in artificial intelligence should be a strategic goal for the next five years?

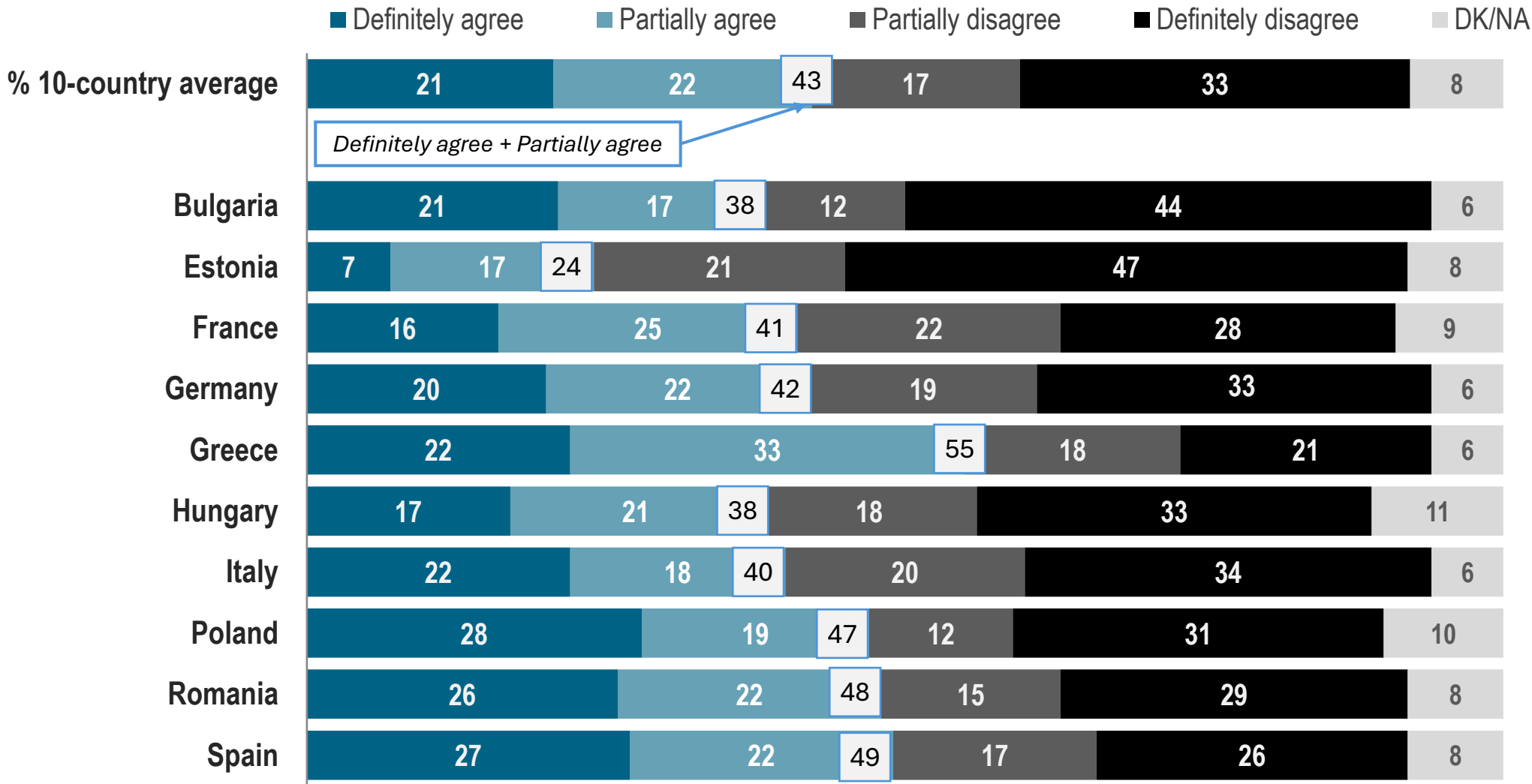


## SECTION 8: The Green Transition

- The 2050 climate neutrality goal
- Impact estimates of a climate-neutral EU on the balance of power

# APPEAL OF THE 2050 CLIMATE NEUTRALITY GOAL

Q. The EU has set as its strategic goal the transition from a fossil to a climate-neutral economy (without carbon dioxide emissions) by 2050. Do you agree or disagree with this transition?;



# IMPACT ESTIMATE OF A CIMATE-NEUTRAL EU ON THE BALANCE OF POWER

Q. In your opinion, the EU's commitment to climate neutrality:

	Will make it a superpower that will lead green economic growth on the planet	Will weaken its competitiveness and growth in comparison to the US and China which do not pursue ambitious climate policies	DK/NA
% 10-country average	22	56	22
Bulgaria	15	62	23
Estonia	11	68	21
France	24	59	17
Germany	28	57	15
Greece	34	43	22
Hungary	22	51	27
Italy	23	54	22
Poland	17	55	28
Romania	25	51	25
Spain	24	56	20

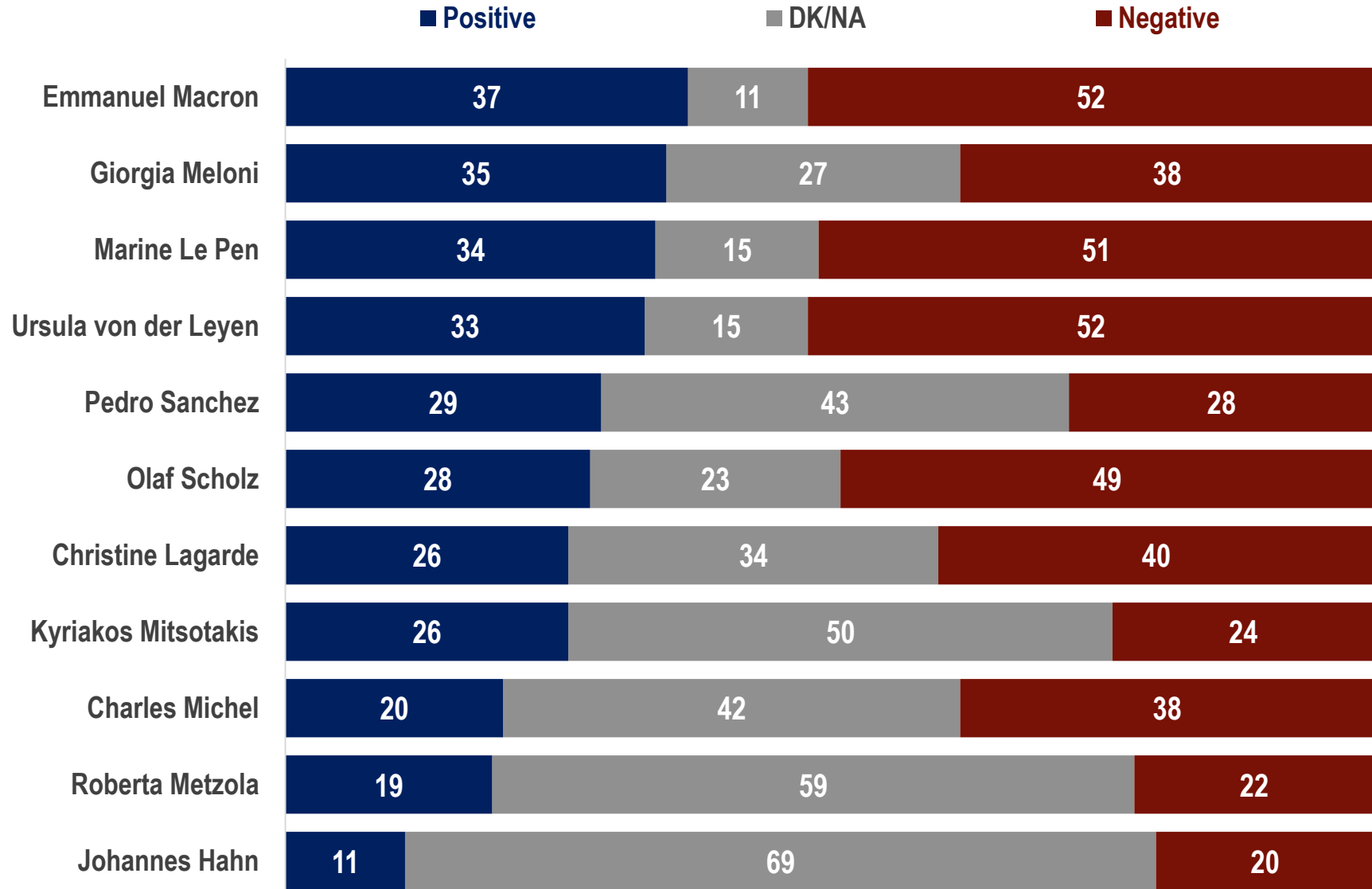
## SECTION 9: Leaders' popularity

- The image of European leadership
- The image of non-EU leadership

# EU LEADERS' POPULARITY

Q. What do you think of the following European leaders?

% 10-country average



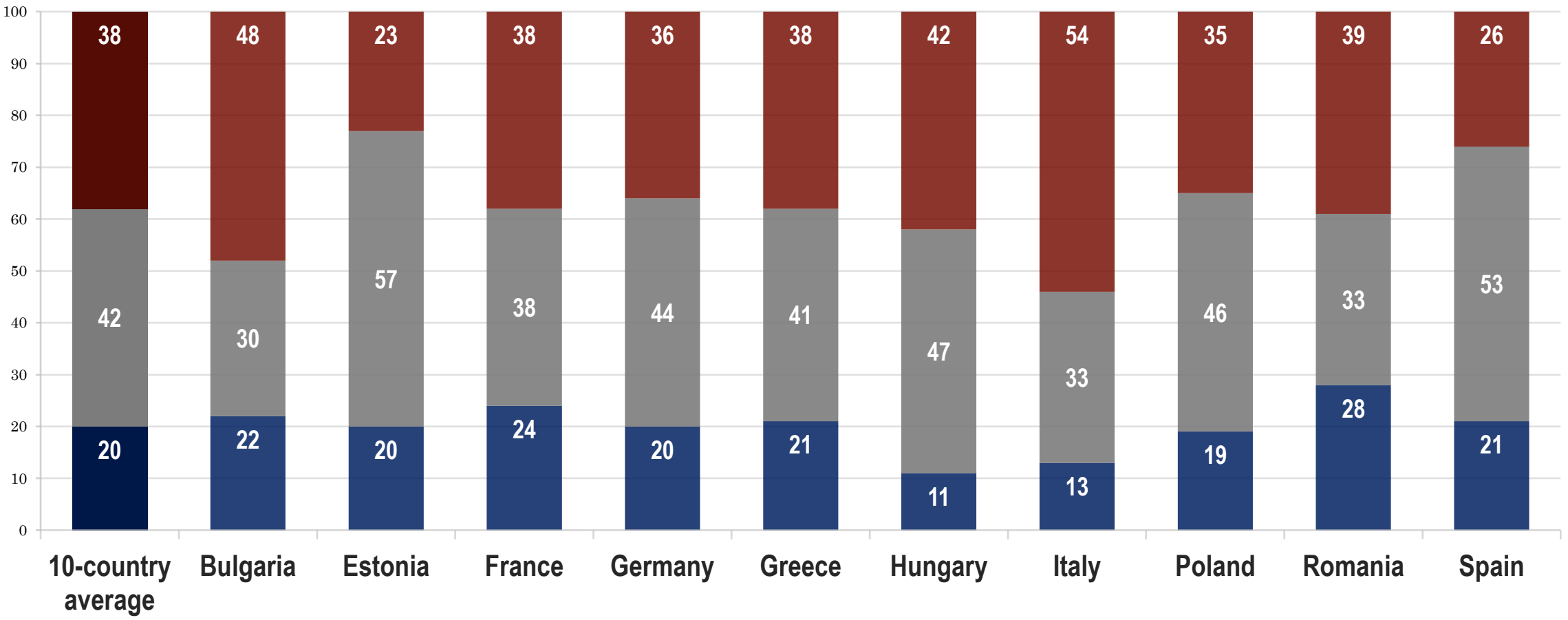
# CHARLES MICHEL POPULARITY

Q. What is your opinion of Charles Michel?



Charles Michel

■ Positive    ■ DK/NA    ■ Negative



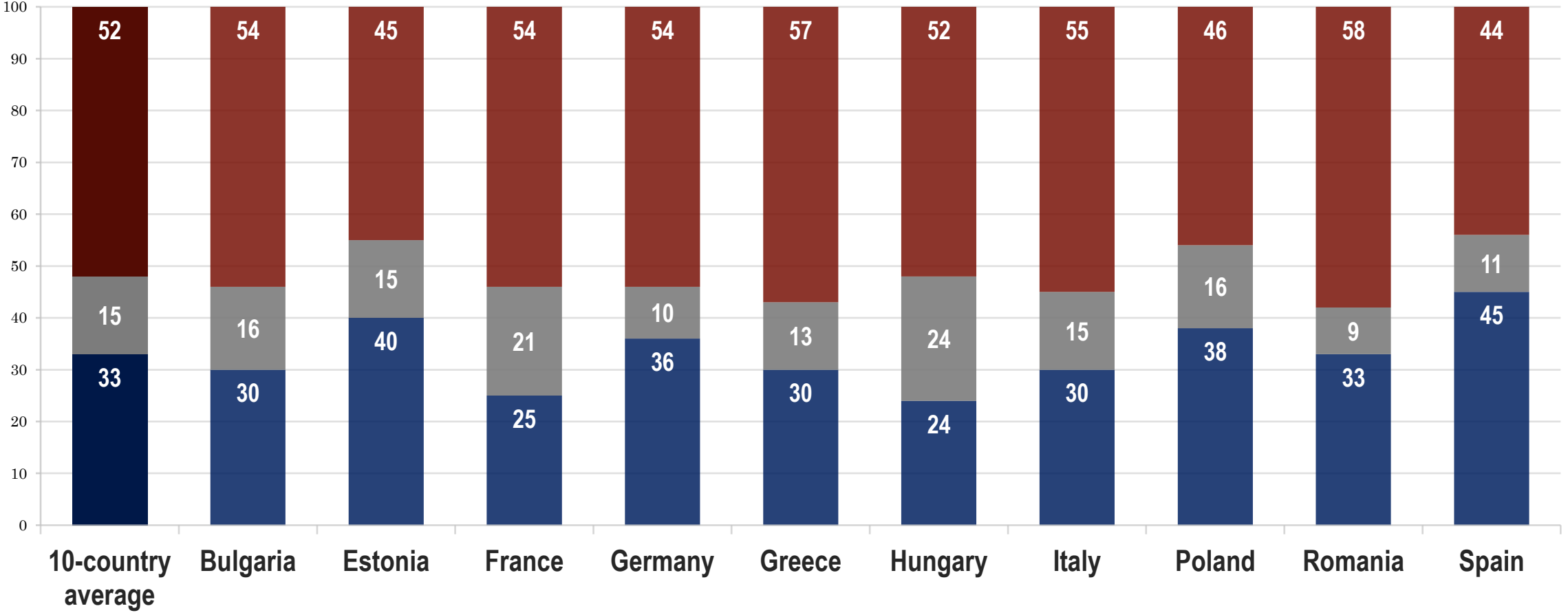
# URSULA VON DER LEYEN POPULARITY

Q. What is your opinion of Ursula von der Leyen?



Ursula von der Leyen

■ Positive    ■ DK/NA    ■ Negative



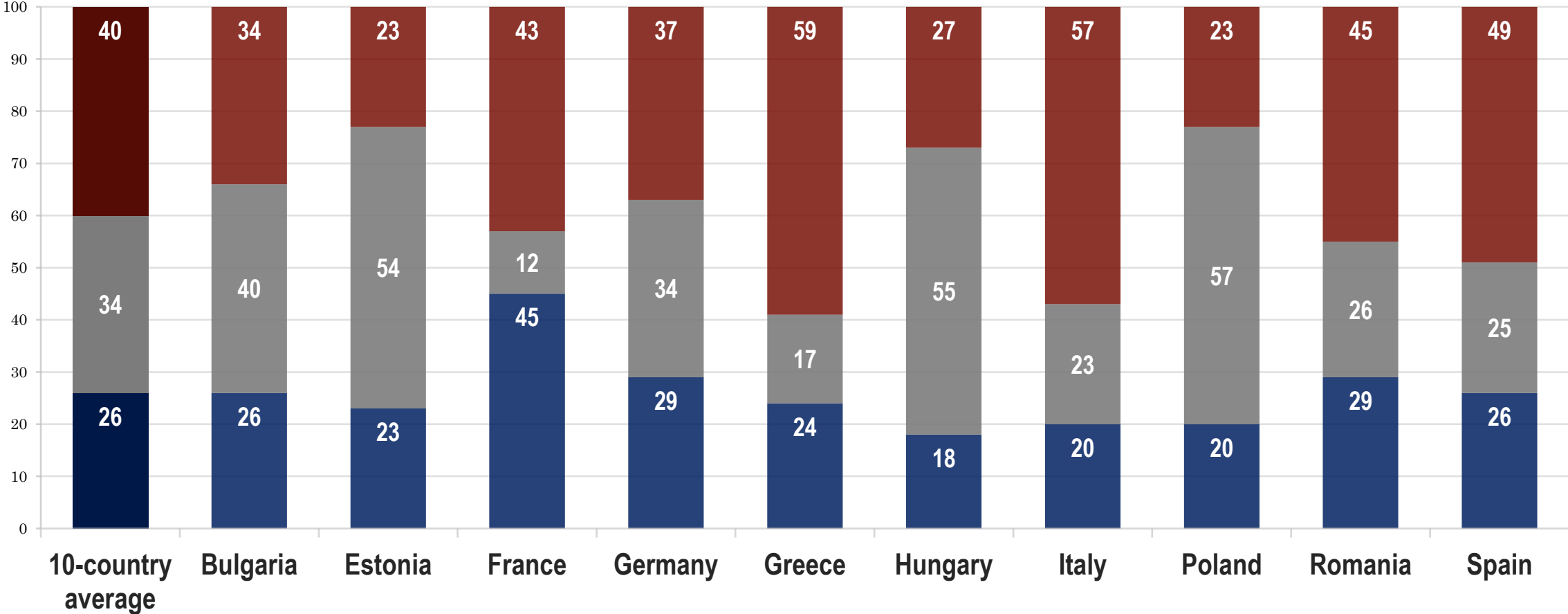
# CHRISTINE LAGARDE POPULARITY

Q. What is your opinion of Christine Lagarde?



Christine Lagarde

■ Positive      ■ DK/NA      ■ Negative



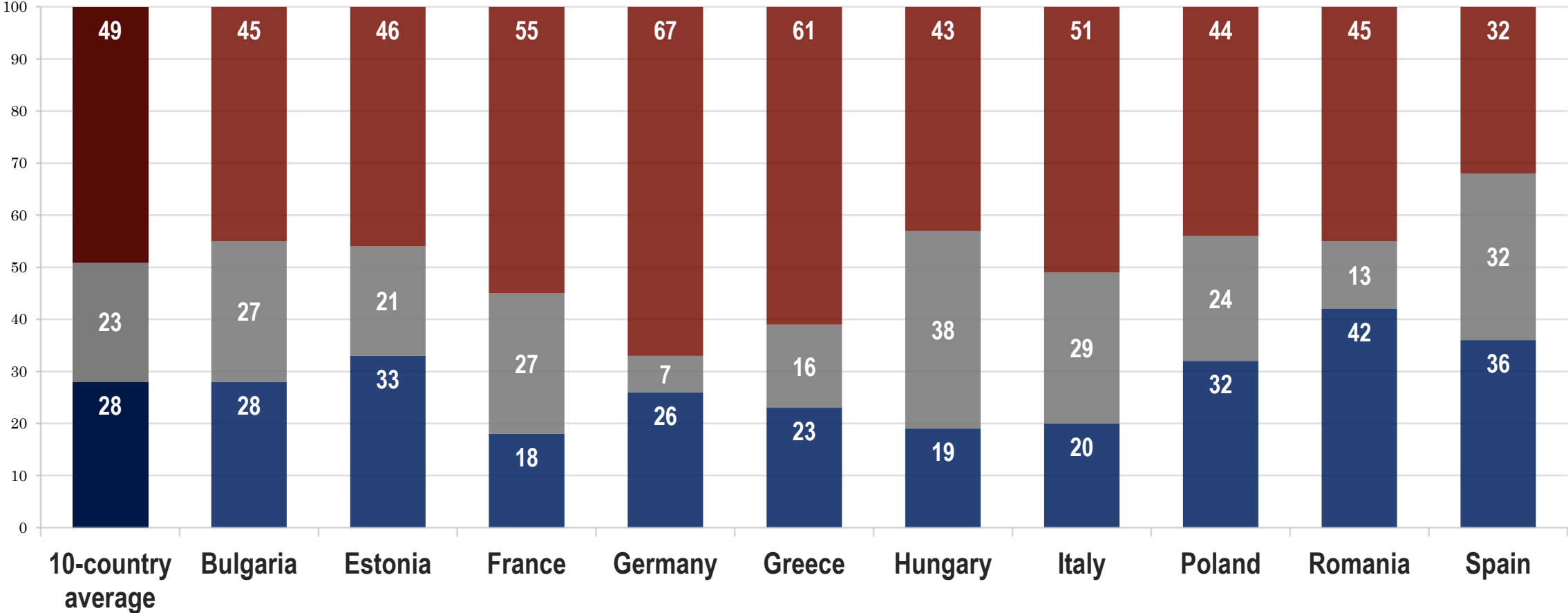
# OLAF SCHOLZ POPULARITY

Q. What is your opinion of Olaf Scholz?



Olaf Scholz

■ Positive    ■ DK/NA    ■ Negative



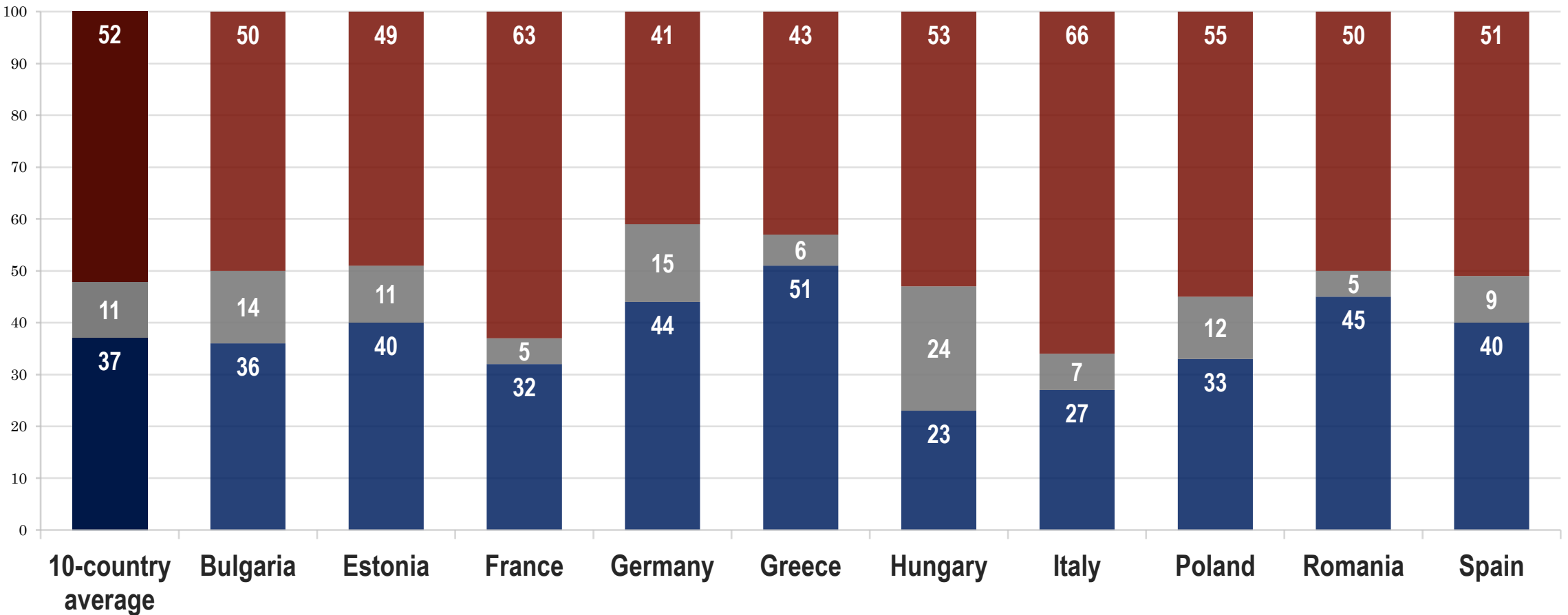
# EMMANUEL MACRON POPULARITY

Q. What is your opinion of Emmanuel Macron?



Emmanuel Macron

■ Positive    ■ DK/NA    ■ Negative



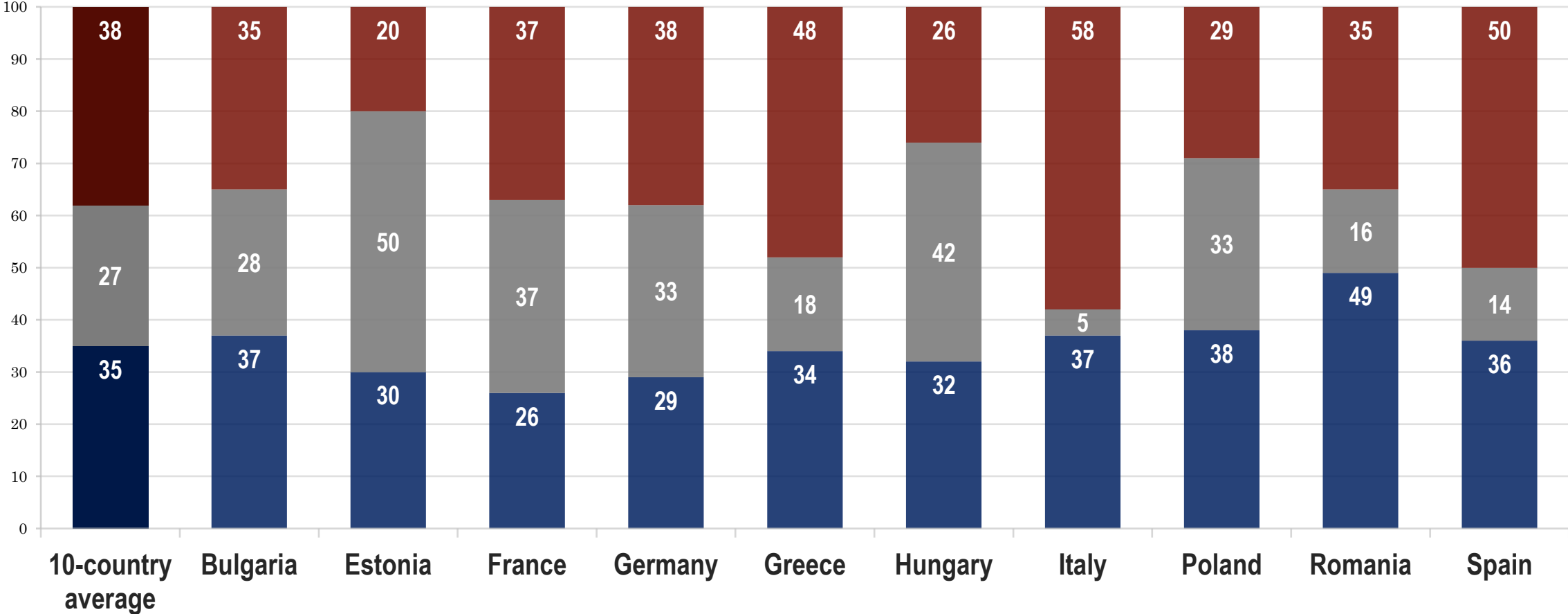
# GIORGIA MELONI POPULARITY

Q. What is your opinion of Giorgia Meloni?



Giorgia Meloni

■ Positive    ■ DK/NA    ■ Negative



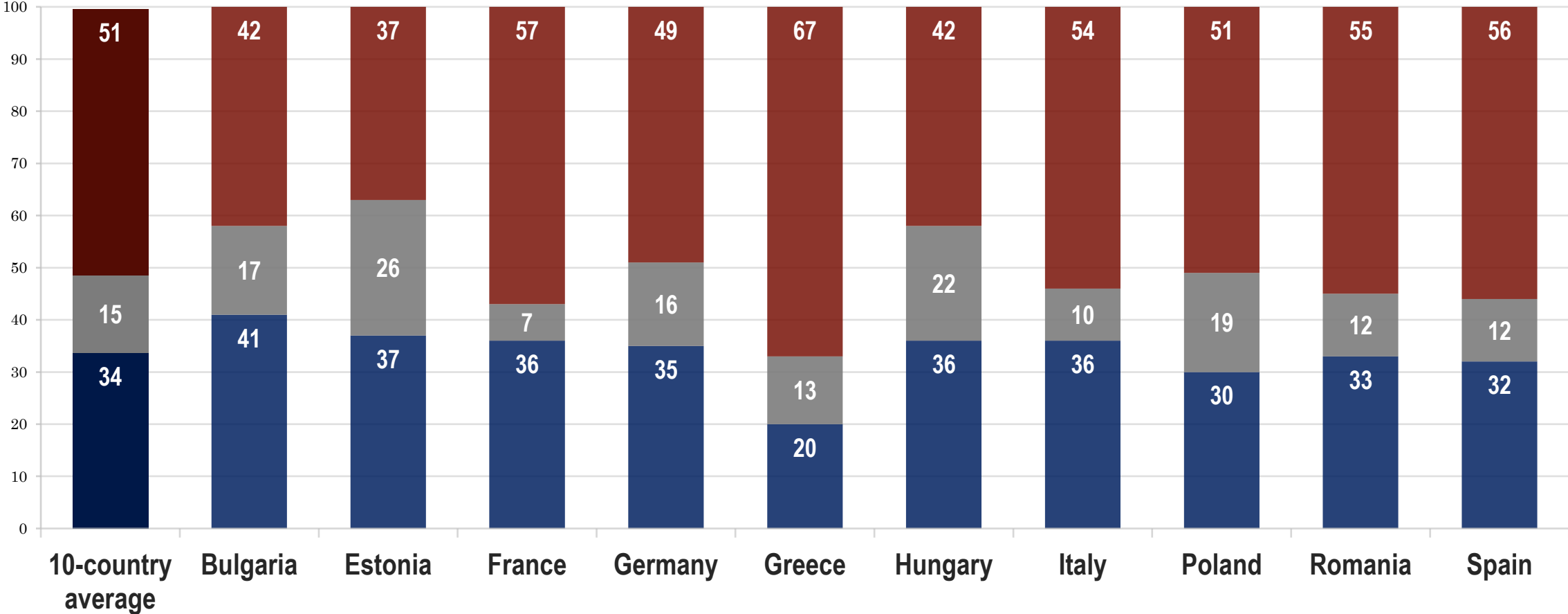
# MARINE LE PEN POPULARITY

Q. What is your opinion of Marine Le Pen?



Marine Le Pen

■ Positive    ■ DK/NA    ■ Negative



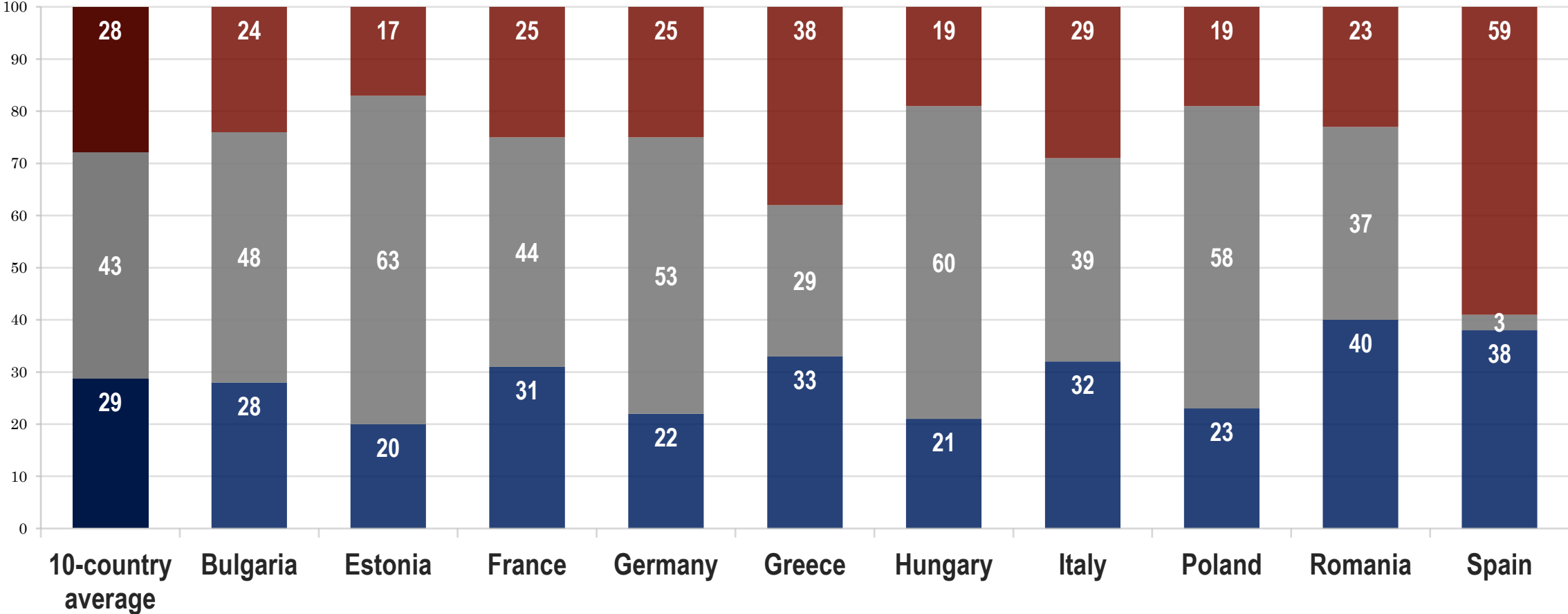
# PEDRO SANCHEZ POPULARITY

Q. What is your opinion of Pedro Sanchez?



Pedro Sanchez

■ Positive    ■ DK/NA    ■ Negative



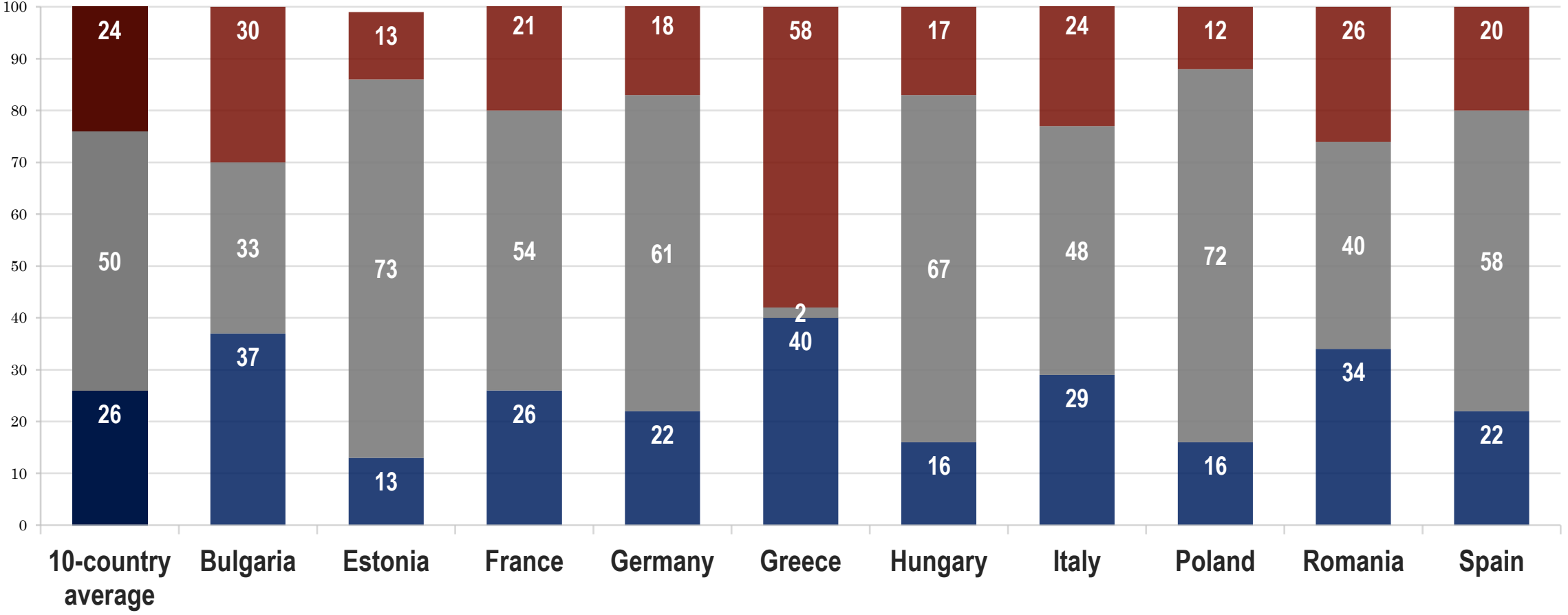
# KYRIAKOS MITSOTAKIS POPULARITY

Q. What is your opinion of Kyriakos Mitsotakis?



Kyriakos Mitsotakis

■ Positive    ■ DK/NA    ■ Negative



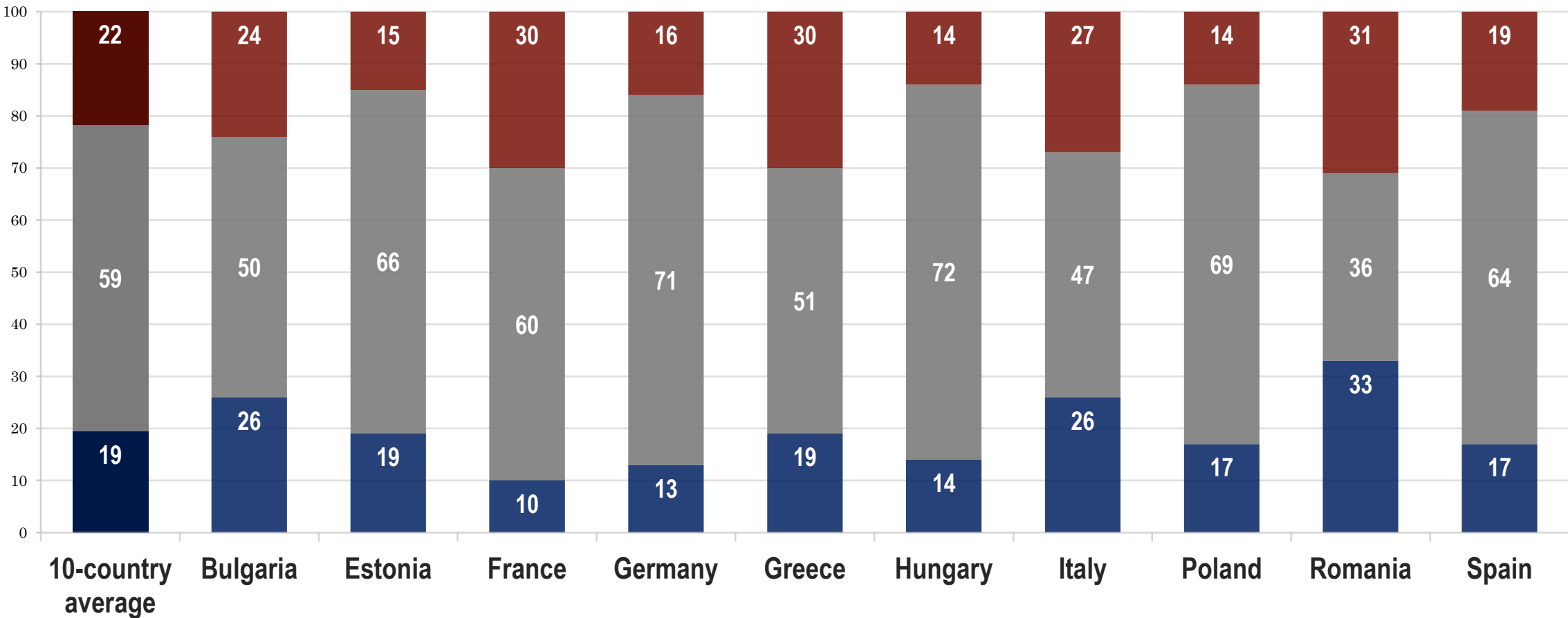
# ROBERTA METSOLA POPULARITY

Q. What is your opinion of Roberta Metsola?



Roberta Metsola

■ Positive    ■ DK/NA    ■ Negative



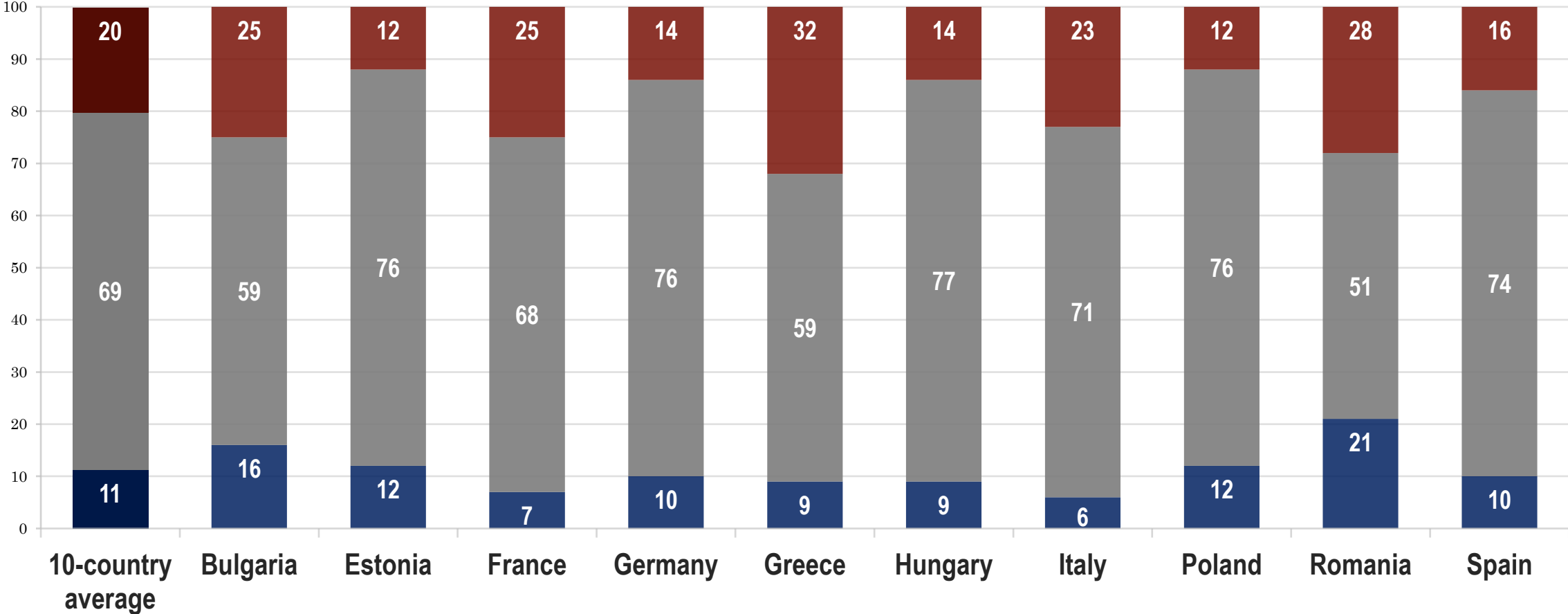
# JOHANNES HAHN POPULARITY

Q. What is your opinion of Johannes Hahn?



Johannes Hahn

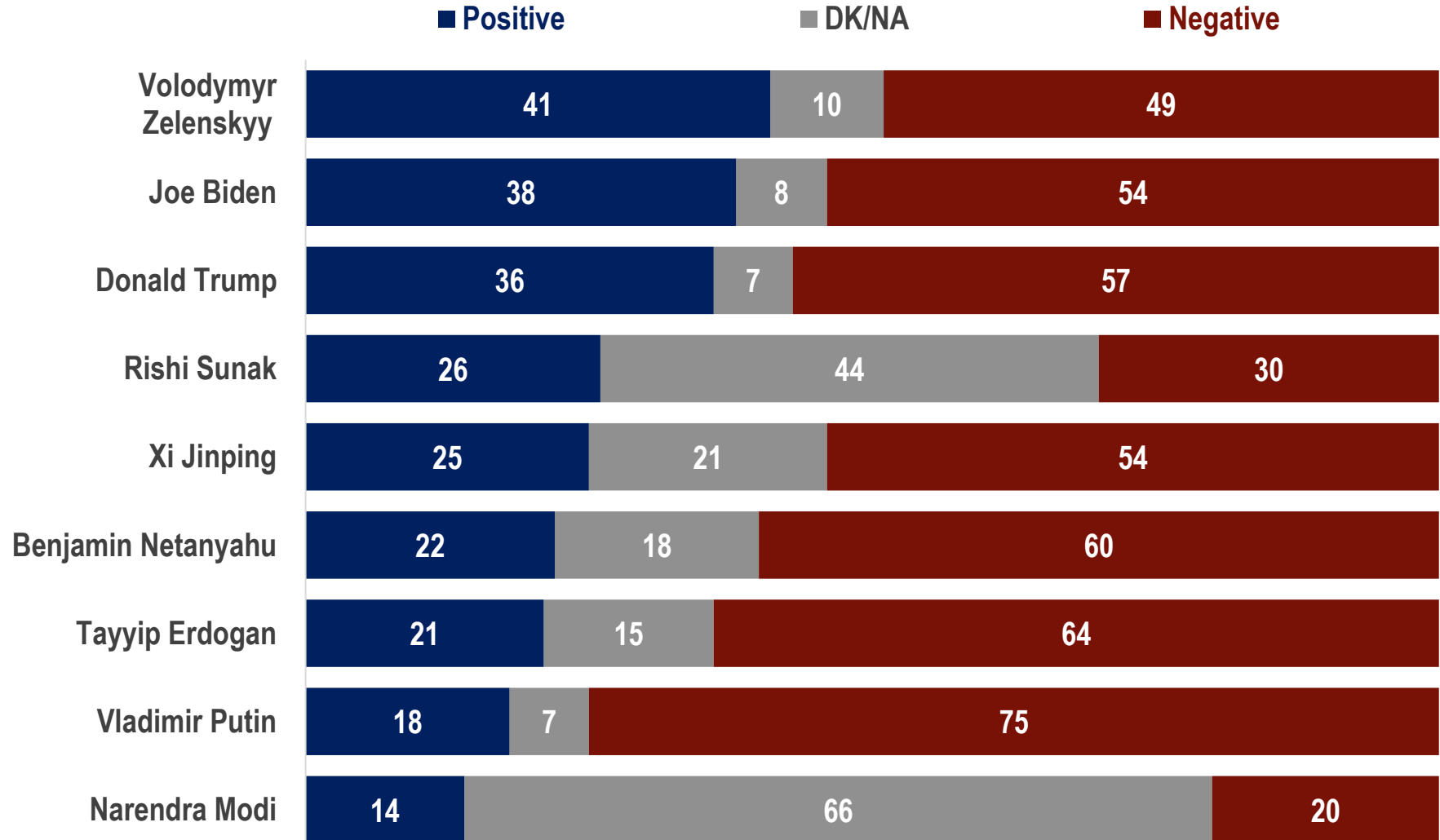
■ Positive    ■ DK/NA    ■ Negative



# NON-EU LEADERS' POPULARITY

Q. And what do you think of the following leaders?

% 10-country average



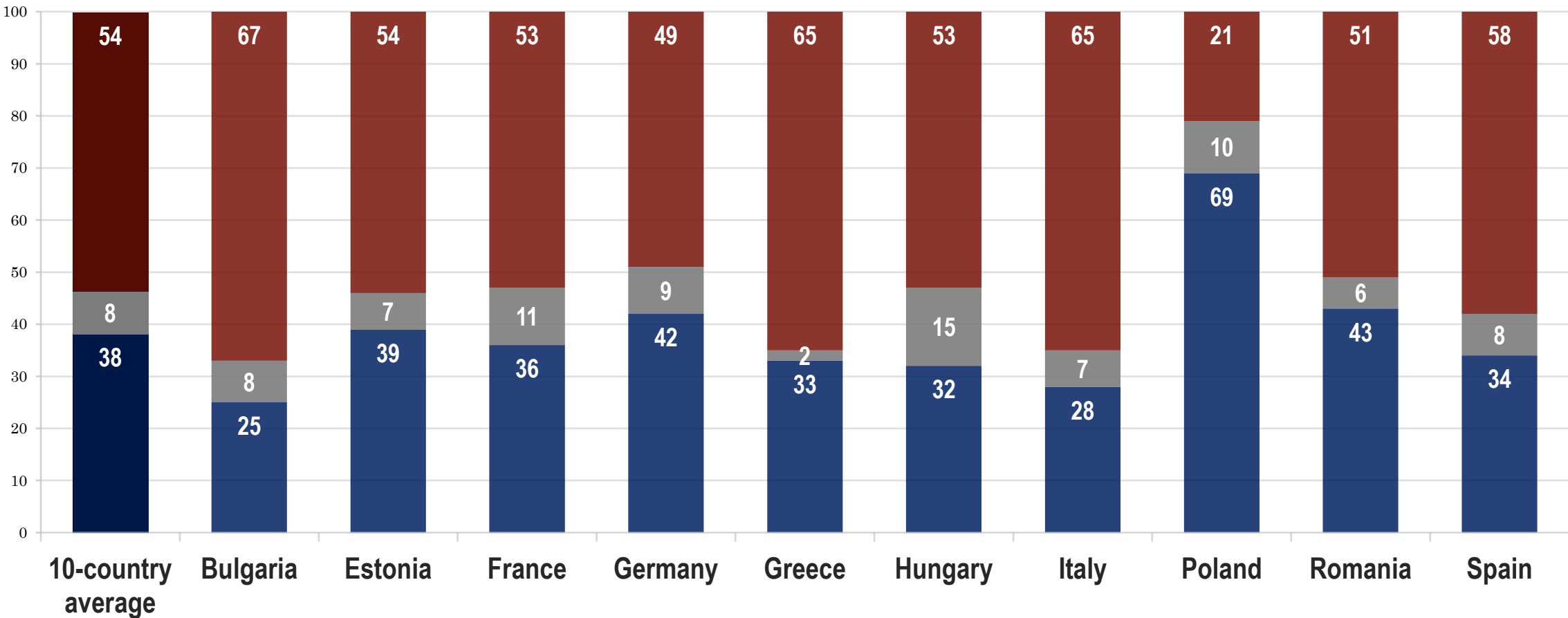
# JOE BIDEN POPULARITY

Q. What is your opinion of Joe Biden?



Joe Biden

■ Positive    ■ DK/NA    ■ Negative



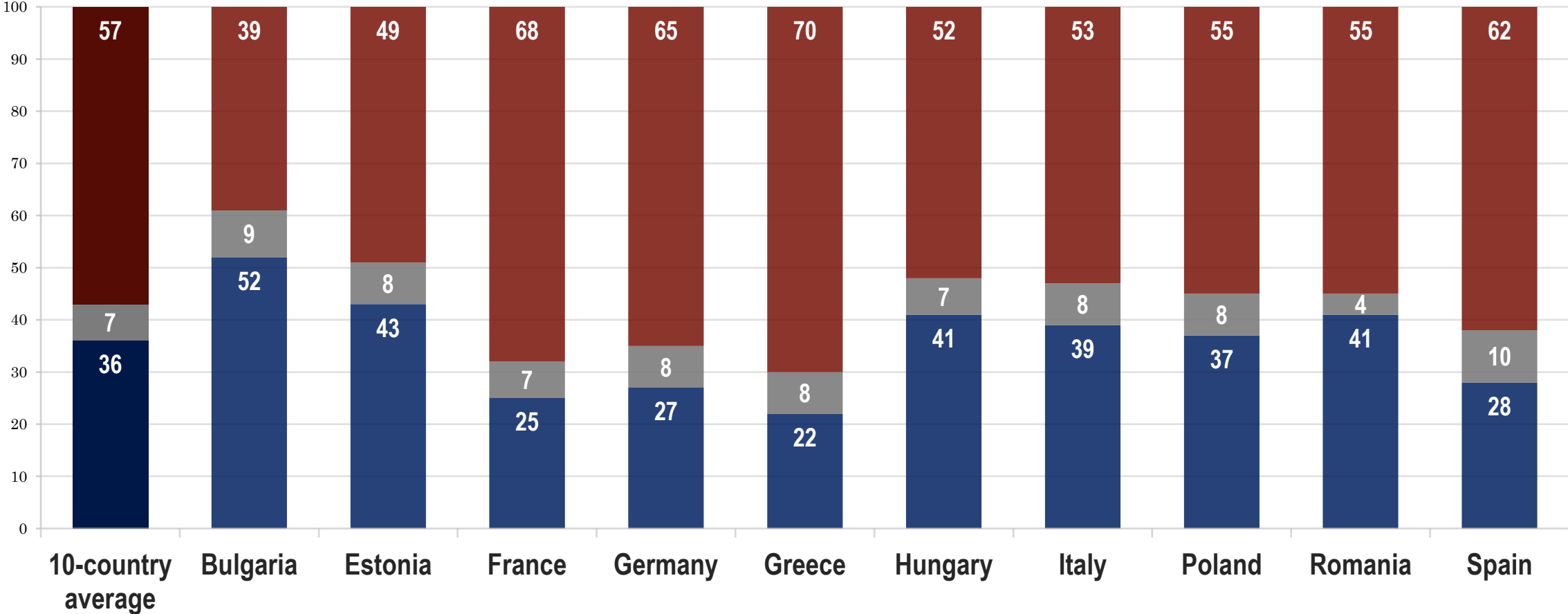
# DONALD TRUMP POPULARITY

Q. What is your opinion of Donald Trump?



Donald Trump

■ Positive    ■ DK/NA    ■ Negative



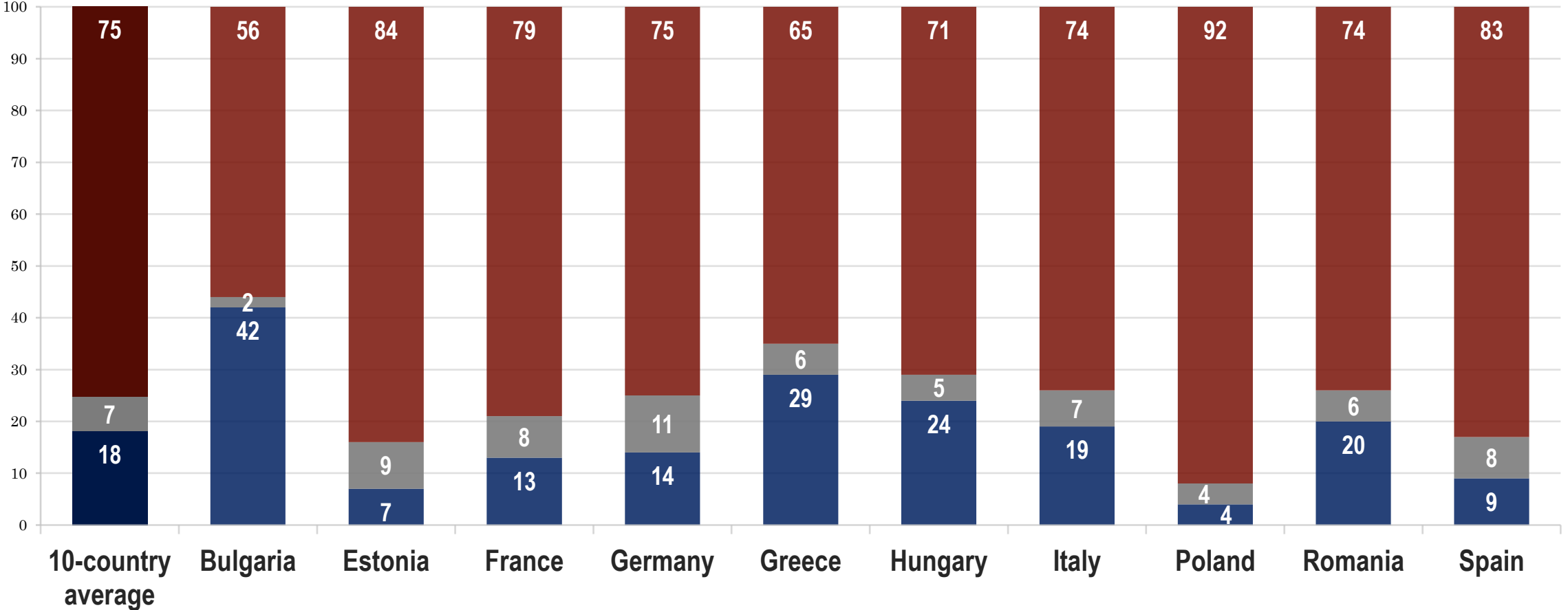
# VLADIMIR PUTIN POPULARITY

Q. What is your opinion of Vladimir Putin?



Vladimir Putin

■ Positive    ■ DK/NA    ■ Negative



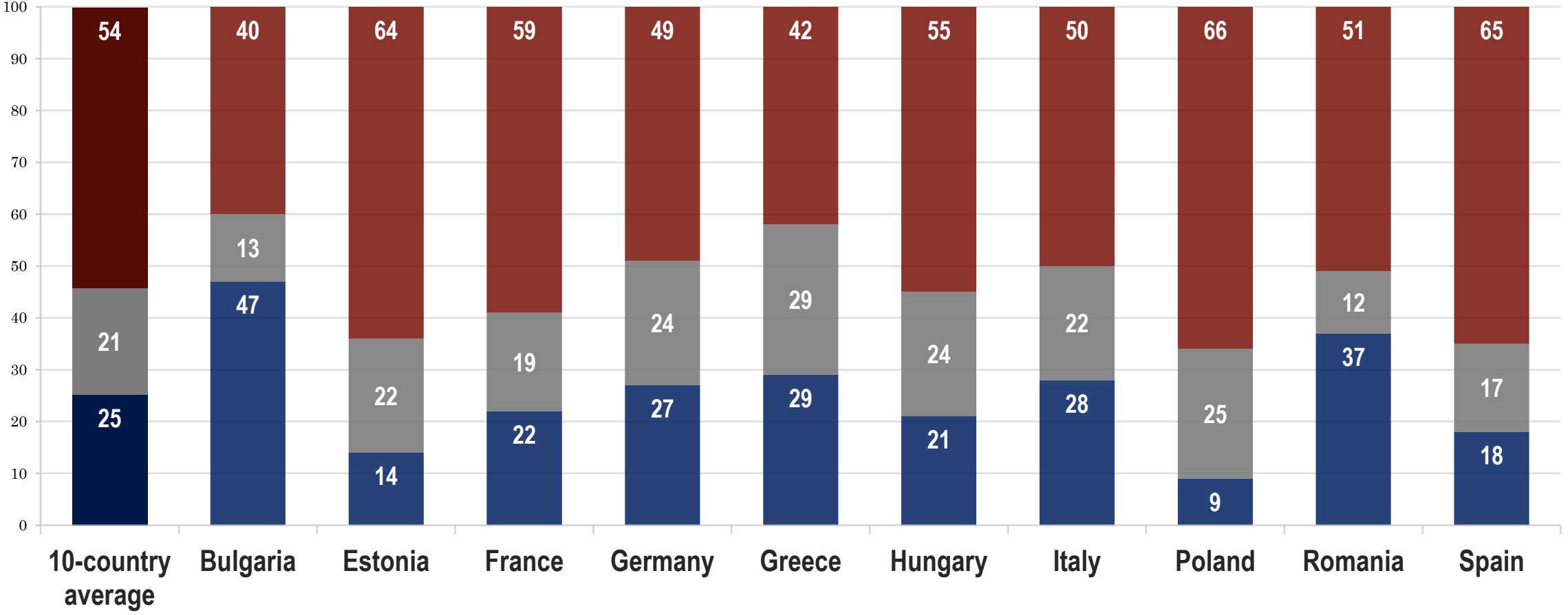
# XI JINPING POPULARITY

Q. What is your opinion of Xi Jinping?



Xi Jinping

■ Positive    ■ DK/NA    ■ Negative



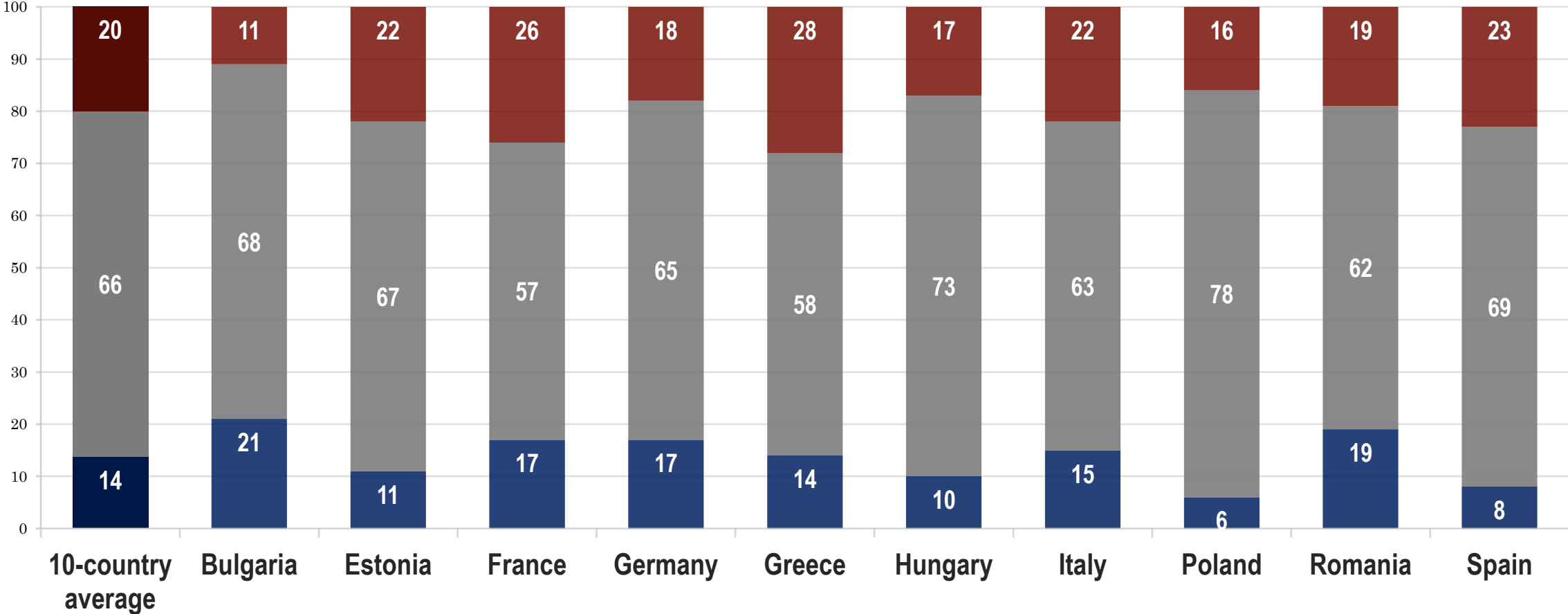
# NARENDRA MODI POPULARITY

Q. What is your opinion of Narendra Modi?



Narendra Modi

■ Positive    ■ DK/NA    ■ Negative



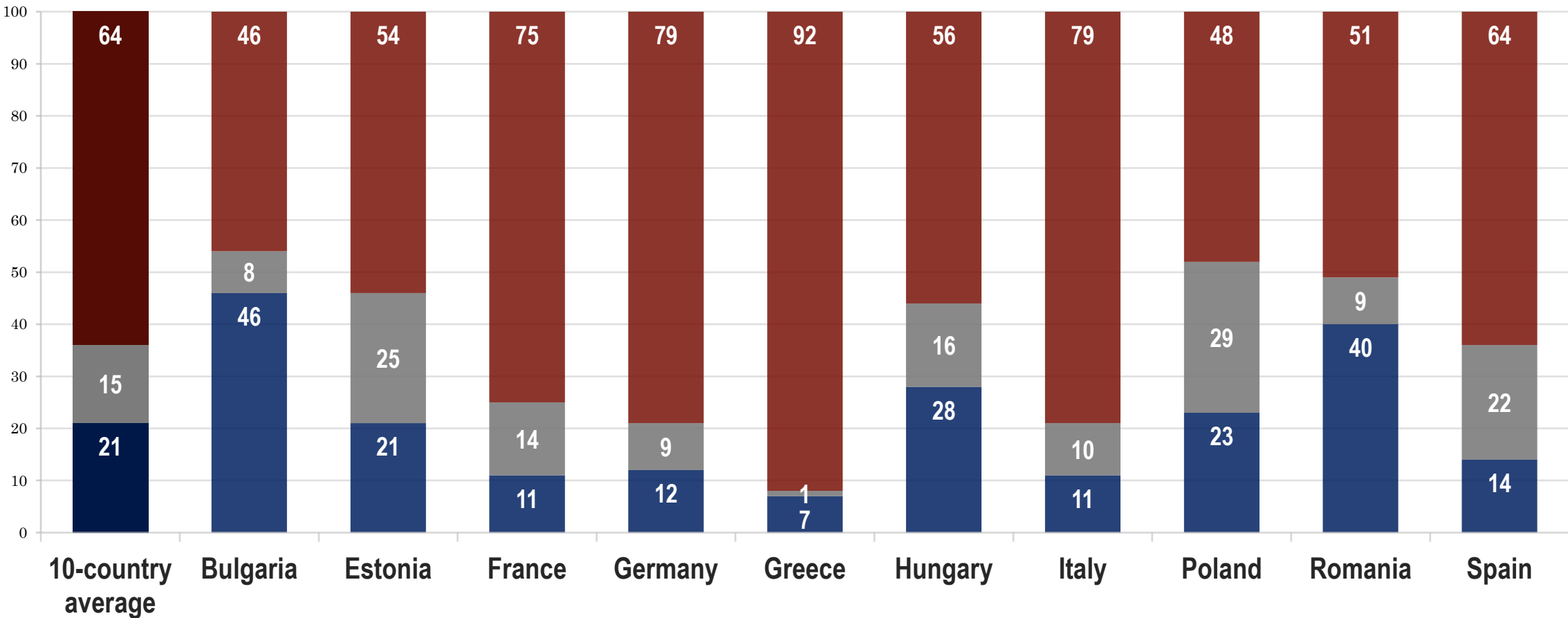
# TAYYIP ERDOGAN POPULARITY

Q. What is your opinion of Tayyip Erdogan?



Tayyip Erdogan

■ Positive    ■ DK/NA    ■ Negative



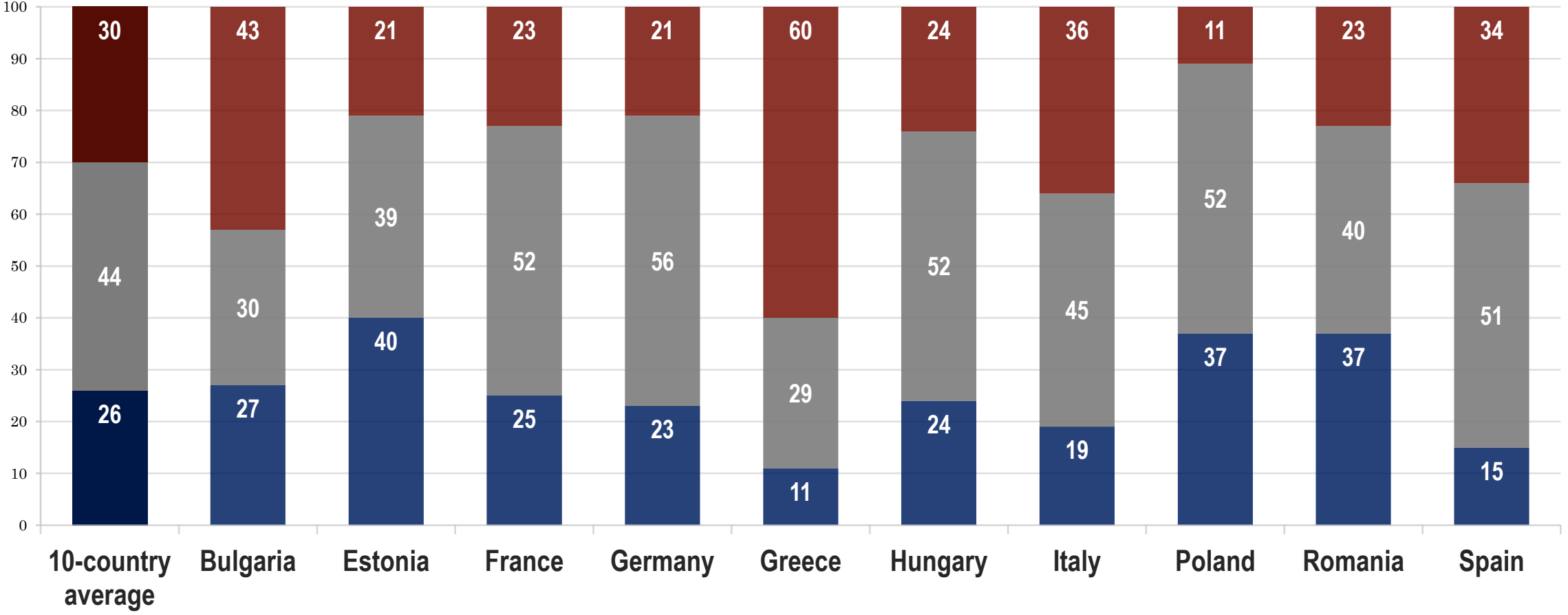
# RISHI SUNAK POPULARITY

Q. What is your opinion of Rishi Sunak?



Rishi Sunak

■ Positive    ■ DK/NA    ■ Negative



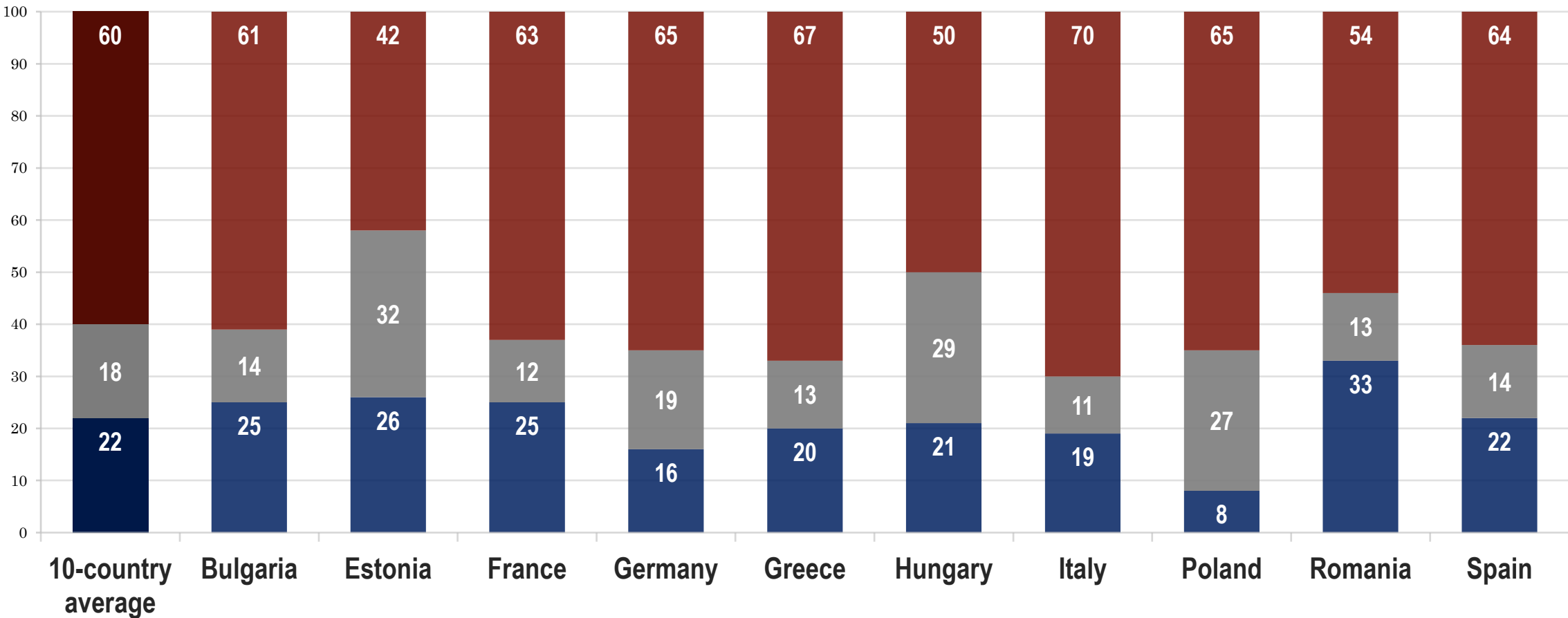
# BENJAMIN NETANYAHU POPULARITY

Q. What is your opinion of Benjamin Netanyahu?



Benjamin Netanyahu

■ Positive    ■ DK/NA    ■ Negative



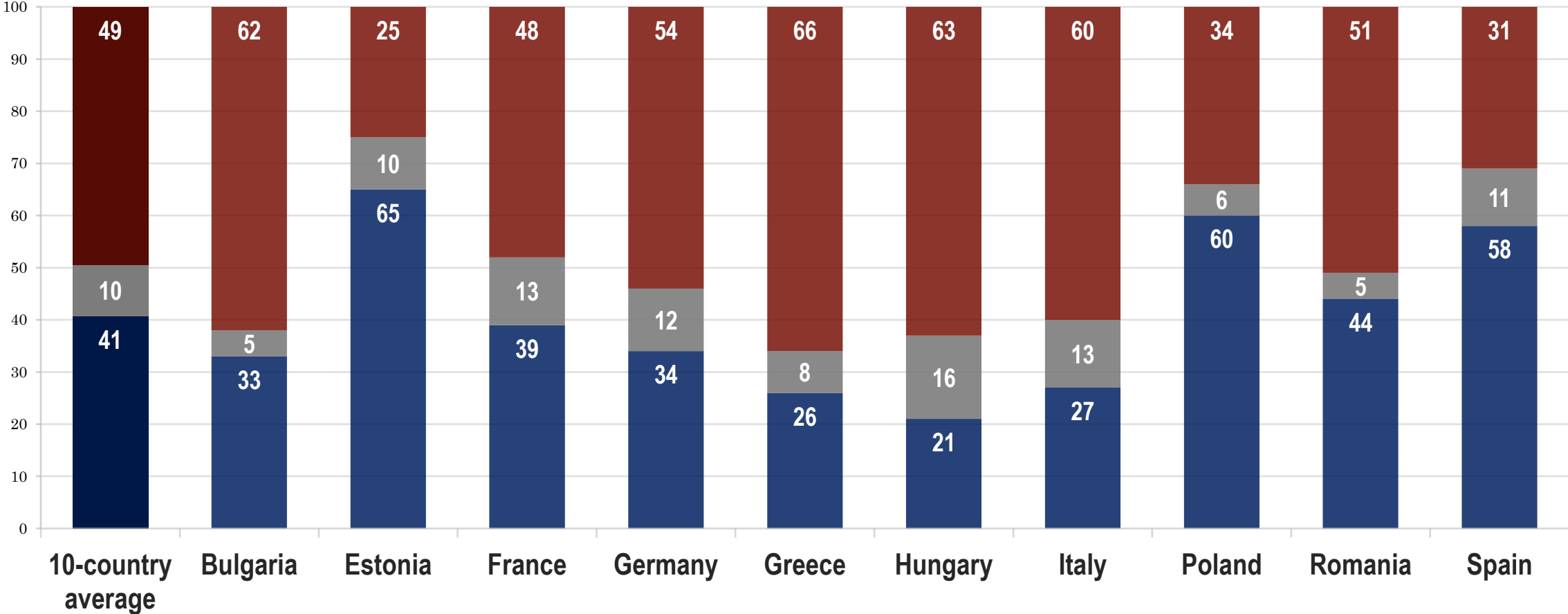
# VOLODYMYR ZELENSKYY POPULARITY

Q. What is your opinion of Volodymyr Zelenskyy?



Volodymyr Zelenskyy

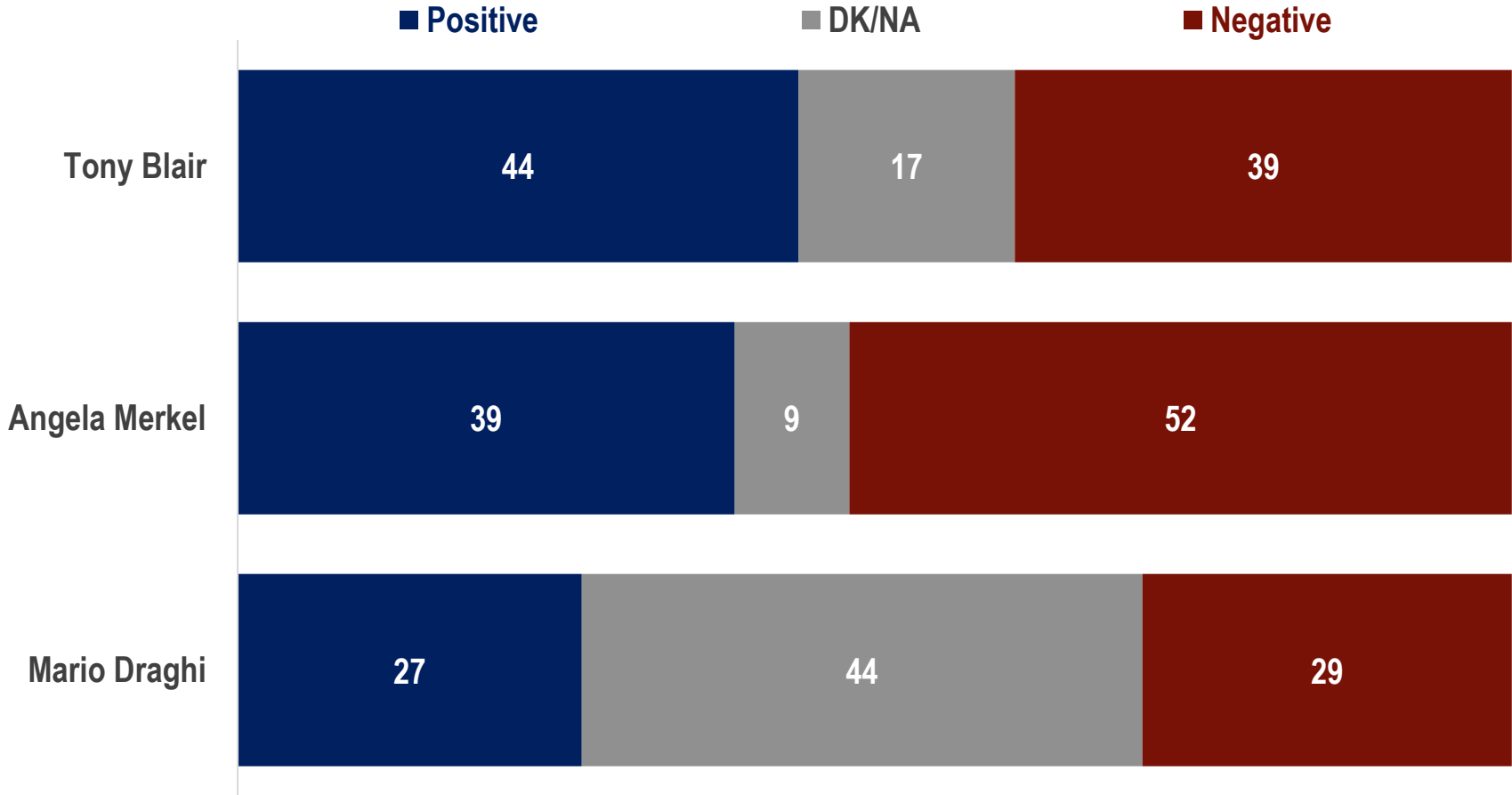
■ Positive    ■ DK/NA    ■ Negative



# PAST LEADERS' POPULARITY

Q. And what are your thoughts on the following past leaders?

% 10-country average



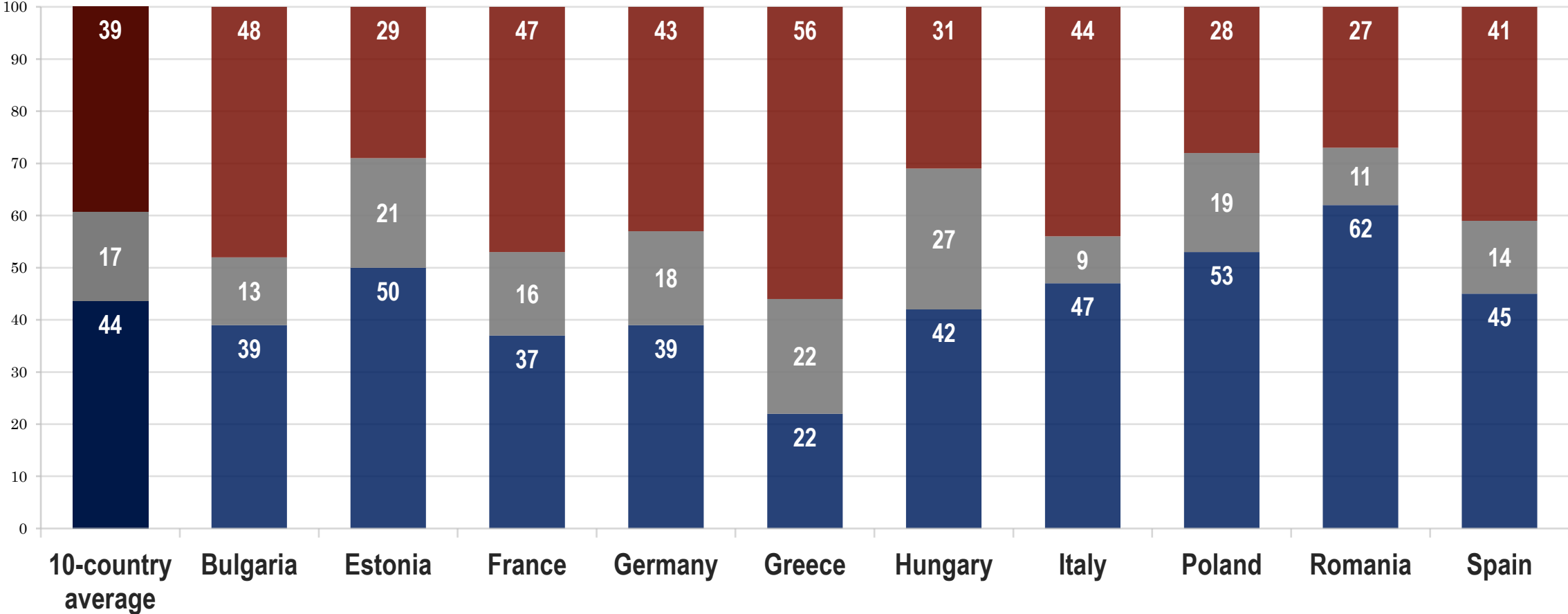
# TONY BLAIR POPULARITY

Q. What is your opinion of Tony Blair?



Tony Blair

■ Positive    ■ DK/NA    ■ Negative



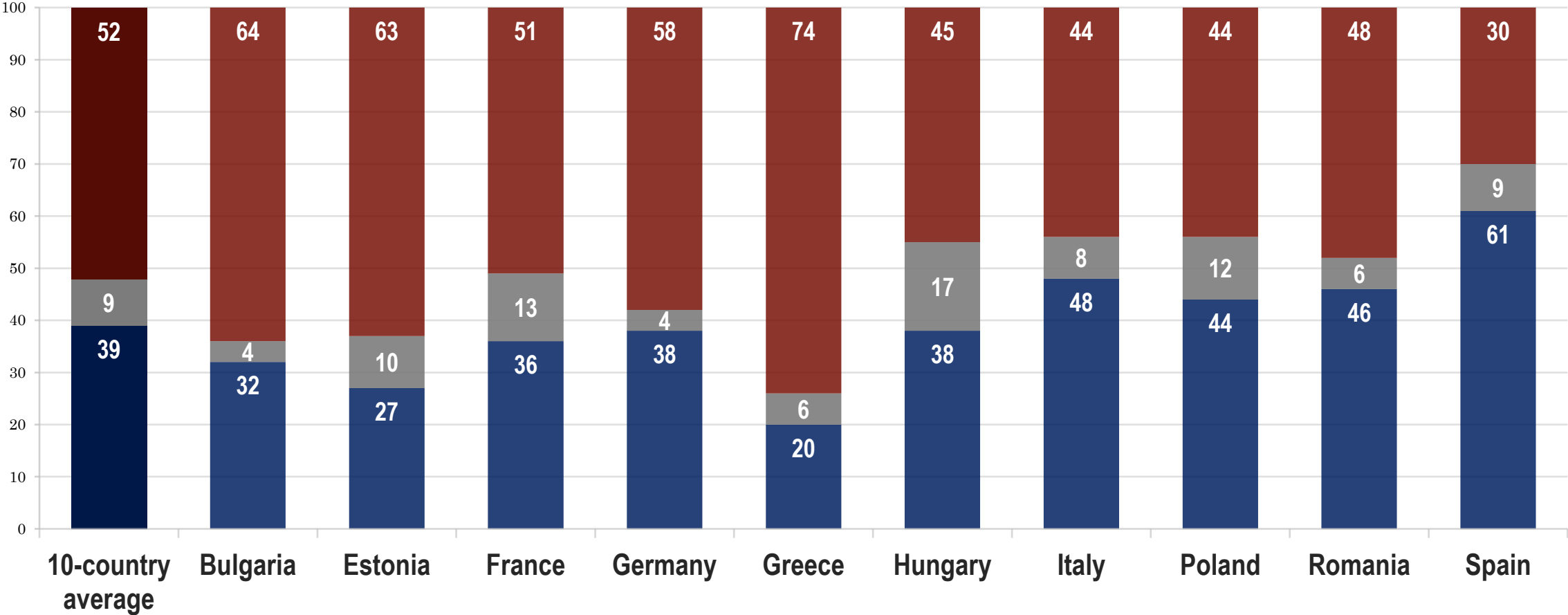
# ANGELA MERKEL POPULARITY

Q. What is your opinion of Angela Merkel?



Angela Merkel

■ Positive    ■ DK/NA    ■ Negative



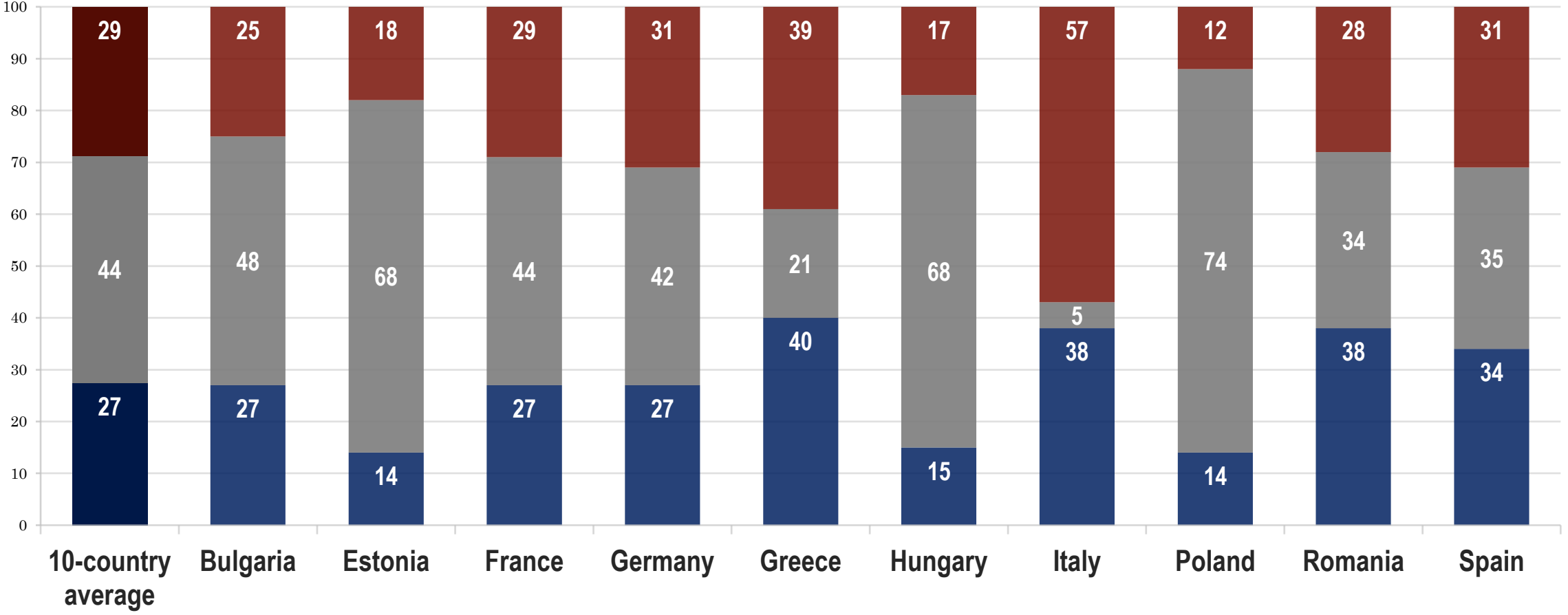
# MARIO DRAGHI POPULARITY

Q. What is your opinion of Mario Draghi?



Mario Draghi

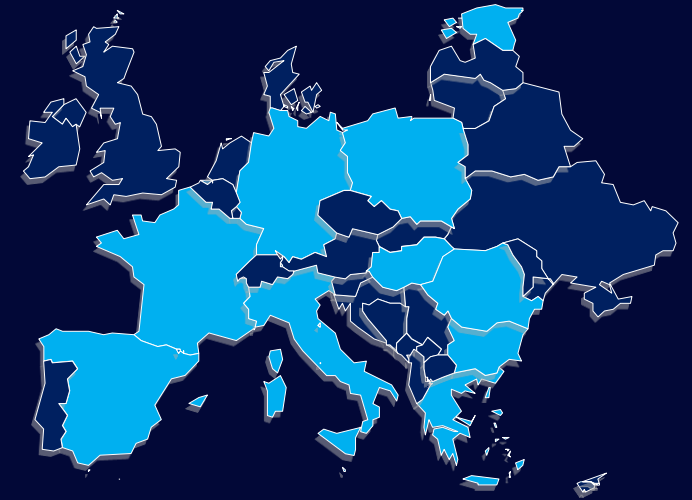
■ Positive    ■ DK/NA    ■ Negative



# Methodology note

This 10-country comparative survey captures attitudes and public opinion of citizens in the EU region ahead of the upcoming European Parliament Elections. The total sample includes 10,883 EU citizens aged 18 and above, from Bulgaria, Estonia, France, Germany, Greece, Hungary, Italy, Poland, Romania, and Spain. Data were collected between May 4 and May 24, 2024. The data collection method employed was Computer-Assisted Web Interviews. The survey has a maximum sampling error of 4% (at a 95% confidence interval), with results presented after rounding. When presenting grouped aggregate results for all countries, the 10-country average is used – but should not be treated as an overall result of the total target population.

To ensure representativeness in our multi-country online surveys, we employ a comprehensive sampling methodology. Data collection is conducted using our proprietary probability-based panels in countries with high internet penetration. To accurately reflect the population, we invite a random sample of each country's panel members to participate in a public opinion survey after informing them about its average duration, purpose, and use of responses results. During data collection, progress is monitored daily until an adequate representative country sample is reached. After data collection is completed, we weight the survey results according to the latest census data in each country, adjusting for age, gender, and education. This ensures our samples mirror the broader demographic profile of each country. It should be noted that online survey participants are, on average, more urban, educated, and digitally literate than the general population.



Country	Sample size (n)
Bulgaria	1,278
Estonia	602
France	1,195
Germany	1,095
Greece	1,078
Hungary	1,096
Italy	1,216
Poland	1,031
Romania	1,211
Spain	1,081

MAY 2024 | 10-COUNTRY COMPARATIVE SURVEY

# EU's Pressing Challenges

What Europe is thinking on the road to  
the 2024 EU Parliament Elections

The publication of these findings abides  
by local rules and regulations.

For information or assistance about this  
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