

TO: EU-US Forum Team
FROM: Alex Alvarado, Tyson Group Vice President
SUBJECT: EU-US Forum May Multi-Country Polling Project
DATE: May 23, 2024

EXECUTIVE SUMMARY

On behalf of the EU-US Forum, the Tyson Group conducted public opinion surveys in five European Union member countries (France, Germany, Italy, Netherlands Portugal) from May 9 - 16. The goal of this research project was to gain a better understanding of the governing philosophies, policies, and leadership style preferred by EU citizens while these matters are top of mind for them less than a month away from the EU parliamentary elections. This memo combines our findings across all five countries.

ECONOMIC ANXIETY DRIVEN BY COST OF LIVING AND TAXES

Across all five countries surveyed, one of the most pressing concerns for respondents is the cost of living. In Portugal, 75% of respondents identify the cost of living as one of the three most critical issues facing their country, closely followed by France (65%), the Netherlands (61%), Germany (57%), and Italy (55%).

Four out of the five countries polled, the cost of living and economic situation / employment combined to be what respondents identify as the most important issue facing their country. The only exception was the Netherlands, where migration dominates as the top issue.

The significant focus on the cost of living and economic situation/unemployment in each country indicates a common struggle with inflation and its effects on daily life. Citizens are feeling the pinch of increased prices for essential goods and services, leading to heightened economic insecurity and dissatisfaction with current economic policies. This phenomenon is illustrated by a large number of citizens in each surveyed country believing their financial situation has gotten worse in the past year: France (59%), Portugal (59%), Italy (54%), Germany (49%), and the Netherlands (48%).

A common policy that European citizens blame for their difficult financial situations is excessive taxation. A staggering 73% of Italian respondents think they are paying too much in taxes, followed by Portugal (69%), Netherlands (52%), Germany (51%), and France (44%).

A SHIFTING DESIRE FOR CONSERVATIVE GOVERNING PHILOSOPHY

The survey results also reveal a noticeable shift towards more conservative political leanings in the face of the economic challenges highlighted above. The respondents in the majority of the countries polled do not think the EU is headed in the right direction under its current left-wing leadership. The trend is most pronounced in the Netherlands (24% think the EU is headed in the right direction - 49% wrong direction), followed by Italy, (29%-44%), and France (32%-44%).

European citizens surveyed also show an eagerness to support conservative parties in their own countries. In France, for instance, the National Rally, a right-wing party, garnered 27% support, reflecting a growing preference for conservative solutions to national issues. Similarly, in Germany, the Christian Democratic Union (CDU) and Alternative for Germany (AfD) collectively received 37% of the vote intentions, signaling a significant conservative inclination.

In Italy, the Brothers of Italy (Fratelli d'Italia), another right-wing party, received 19% support, while in the Netherlands, the Party for Freedom (PVV) led with 22% support. Portugal also showed a substantial backing for conservative parties, with 20% supporting the Democratic Alliance and 19% supporting Chega.

This trend suggests that EU citizens are increasingly turning to conservative parties in hopes of more stringent economic and immigration policies, reflecting a broader skepticism towards liberal approaches in times of economic distress.

LOW APPROVAL RATINGS HIGHLIGHT BACKLASH AGAINST CURRENT GOVERNANCE

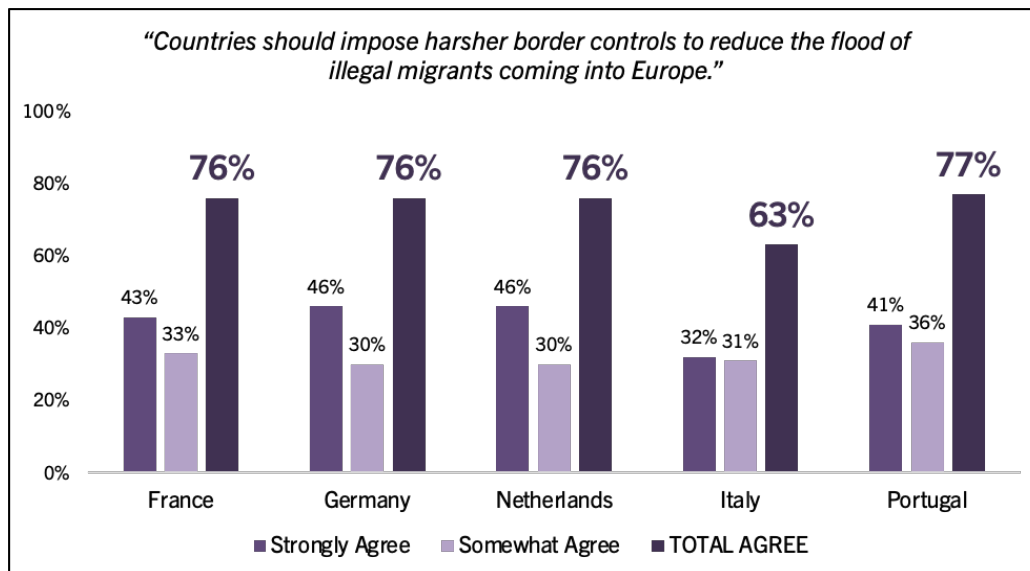
Leadership approval ratings across the surveyed countries also highlight a general dissatisfaction with current governance. In France, President Macron and Prime Minister Attal face high disapproval rates of 62% and 51%, respectively. Germany’s Chancellor Scholz also encounters a 61% disapproval rate, reflecting citizens’ frustration with their leaders’ handling of economic issues.

In Italy, Prime Minister Meloni’s approval is notably low at 36%, while in the Netherlands, Prime Minister Rutte’s disapproval stands at 52%. Portugal’s Prime Minister Costa faces a similar situation, with 49% disapproving of his performance.

Despite these disapprovals, a significant portion of respondents in each country still express a strong likelihood to participate in the upcoming EU elections, indicating an engaged electorate eager for change and potentially new leadership.

SERIOUS CONCERNS ABOUT ILLEGAL IMMIGRATION

Illegal migration is a significant issue for respondents in all surveyed countries, highlighting growing concerns over migration policies and their impact on national security, economy, and social stability.

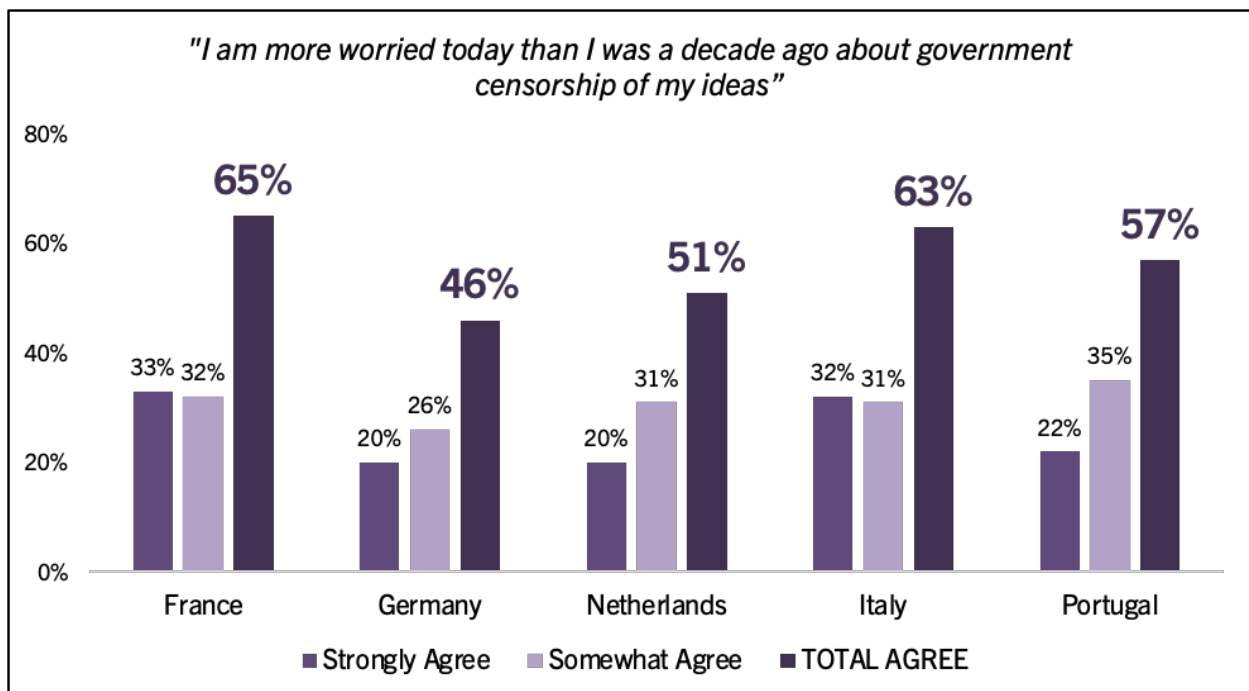


The intense agreement with imposing harsher border controls across these countries underscores a pervasive apprehension about illegal migration and its effects on national security, economic stability, and social cohesion. The strong support for stricter immigration measures indicates a significant shift towards conservative viewpoints on this issue, driven by the perceived need to protect national borders and manage migration flows more effectively.

This sentiment aligns with the broader trend of increasing support for conservative parties that advocate for tougher migration policies.

RISING FEARS OVER GOVERNMENT CENSORSHIP

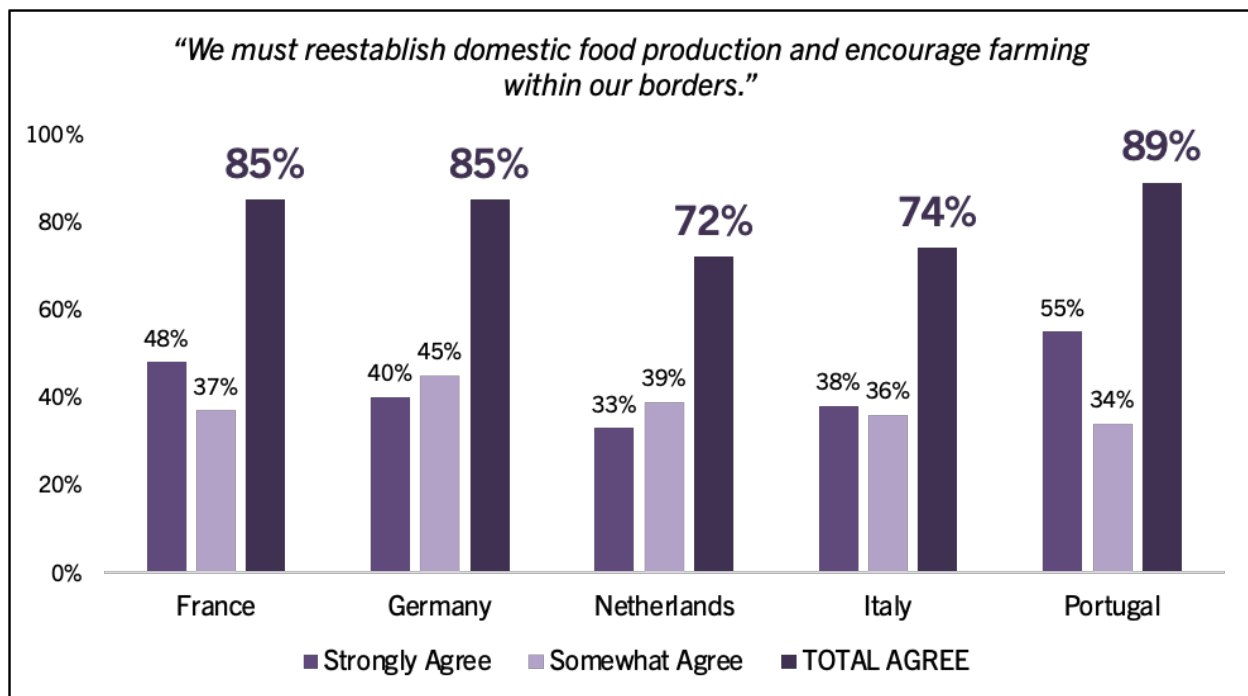
The surveys reveal a significant concern among respondents regarding government censorship. When asked if they agree with the statement, "I am more worried today than I was a decade ago about government censorship of my ideas," a substantial number of participants expressed agreement.



The concern about government censorship is markedly high among voters in the surveyed countries, with France and Italy showing the most significant levels of anxiety. In France, 65% of respondents expressed worry about government censorship, with a notable 33% strongly agreeing with the statement. Italy shows a similar pattern, with 63% of respondents agreeing, including 32% who strongly agree.

A CALL TO REINVIGORATE DOMESTIC AGRICULTURE

The survey results highlight a strong sentiment across several European countries for reinvigorating domestic agriculture and encouraging local food production. When asked to agree or disagree with the statement, "We must reestablish domestic food production and encourage farming within our borders," the responses were overwhelmingly positive, indicating a widespread recognition of the importance of local agriculture.

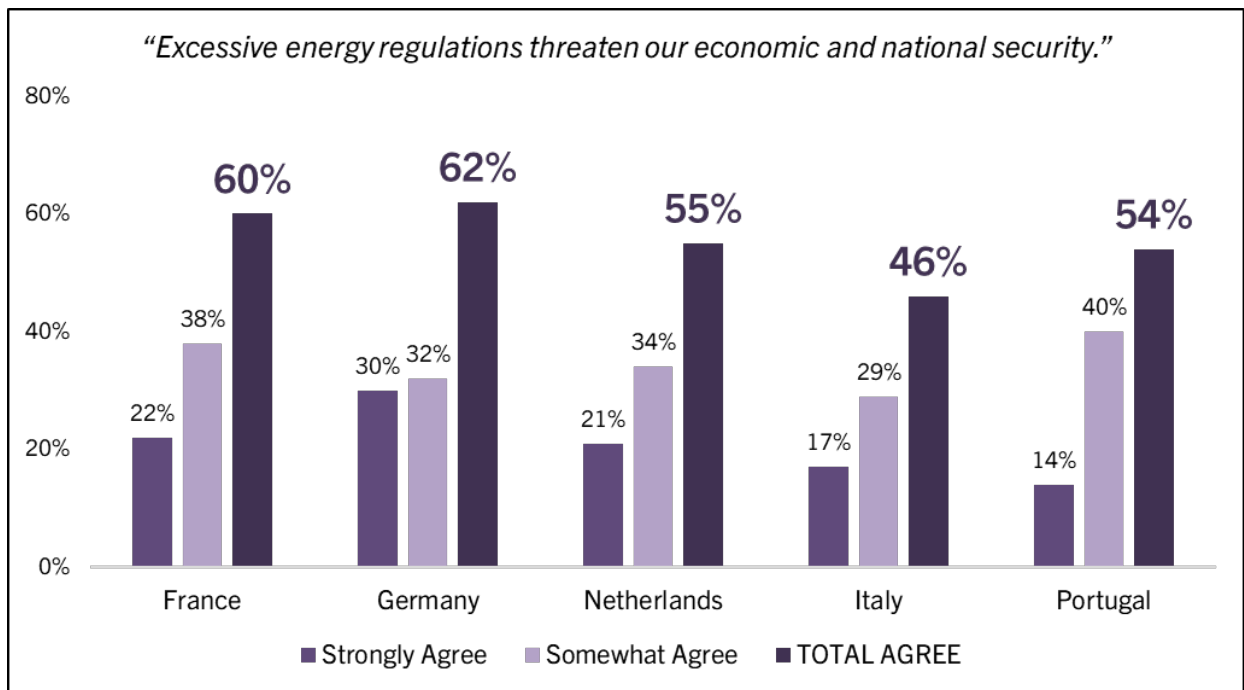


In Portugal, an overwhelming 89% of respondents agree with the statement, with a substantial 55% strongly agreeing. This high level of agreement suggests a strong public mandate for enhancing local agricultural initiatives to ensure food security and sustainability.

Italy shows a similar pattern, with 74% of respondents supporting the call for reinvigorating domestic agriculture, including 38% who strongly agree. The Italian population's strong endorsement reflects concerns over food sovereignty and the desire to reduce dependency on foreign food supplies. France also shows significant support, with 85% of respondents agreeing, of which 48% strongly agree.

FEELING THAT EXCESSIVE REGULATIONS THREATEN ECONOMIC & NATIONAL SECURITY

The survey makes clear that European citizens across the board are worried excessive energy regulations from their governments are a threat to their economic and national security.



The trend is most pronounced in Germany, likely due to the energy crisis caused by their over-reliance on imported gas. In Germany, 65% agreed with the statement, followed by 60% in France and 55% in the Netherlands.

CONCLUSION

In summation, the surveys fielded earlier this month make clear that EU citizens are yearning for changes in their governments and the policies they pursue. There is a strong negative sentiment towards the direction the EU is headed and the leadership in various countries. This phenomenon is driving the uptick in support conservative parties saw in each of our surveys.

EU citizens are struggling financially and blame the high taxes and excessive energy regulations that are being pursued by their home governments and in Brussels. The backlash in Europe, however, is not just limited to the economy. Respondents are also worried about the expansion of government censorship and the inability of their leaders to secure their borders.

Our data suggests a vast conservative shift is well under way in some of the largest countries in the European Union.

METHODOLOGY

The surveys were conducted online and included 500 respondents from each of the five countries: France, Germany, Italy, Netherlands, and Portugal. Samples were pulled from a top-global market research firm.

The questionnaires were translated and presented to voters in their native languages to ensure clarity and accuracy in responses. Participants were selected to represent the general population in terms of gender, age, and regional distribution, providing a comprehensive view of public opinion across different demographics. The surveys were carried out between May 9, 2024, and May 16, 2024.