

Cluster **17** x **POLITICO**

PAN-EUROPEAN PULSE : TAKING THE PULSE OF EUROPE



March 2026

Sample size: 6,698 individuals

METHOD

What?

Online survey conducted using the CAWI method among **6,698 people** in **six EU countries** : **France** (1,515), **Italy** (1,019), **Spain** (1,121), **Germany** (1,006), **Poland** (1,031) and **Belgium** (1,006 including 502 in Wallonia and 504 in Flanders).

How?

The samples are **representative** of the surveyed populations and are selected using the **quota method**, based on criteria such as age, gender, socioeconomic status, municipality size, and region of residence.

When?

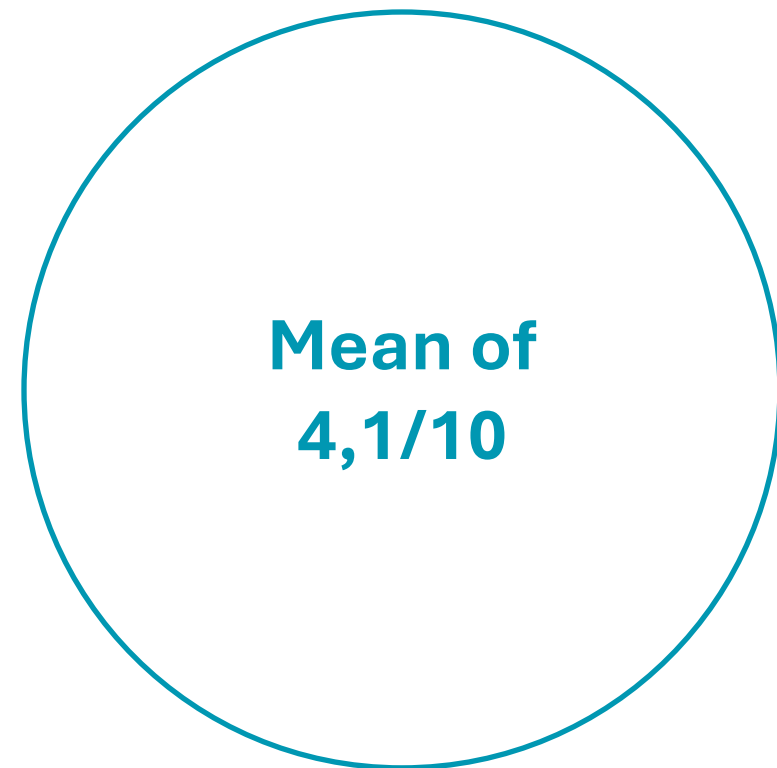
Interviews conducted:

- March 13th – 18th (France, Spain)
- March 14th – 20th (Belgium)
- March 14th – 21st (Germany, Italy, Poland)

Cluster**17**

**THE EUROPEAN PULSE:
GENERAL SENTIMENT, IDENTITY
& GEOPOLITICS**

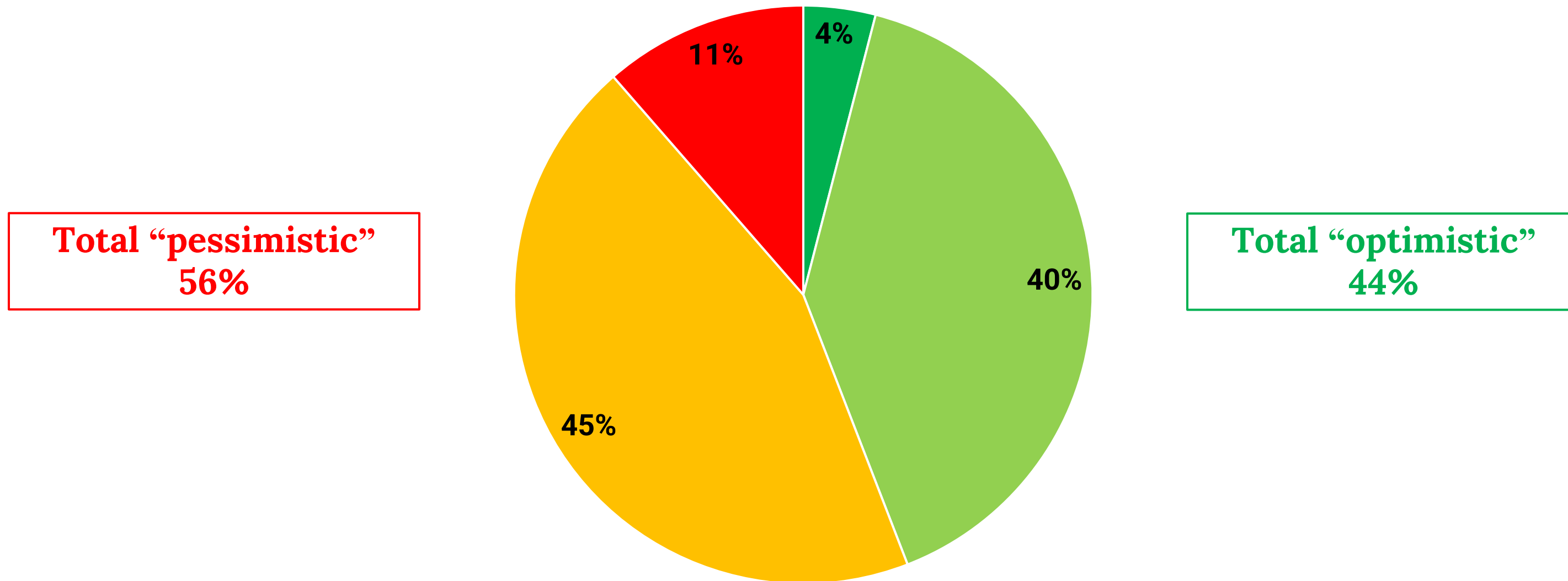
On a scale from 0 to 10, where 0 means “completely wrong direction” and 10 means “completely right direction”, how would you rate the direction in which the European Union is heading today?



Country	Mean
Poland	5,6
Belgium	4,3
Germany	4,2
Spain	4,1
France	3,5
Italy	3,5
Total	4,1

When you think about your own life over the next five years, are you generally optimistic or pessimistic?

■ Very optimistic ■ Somewhat optimistic ■ Somewhat pessimistic ■ Very pessimistic

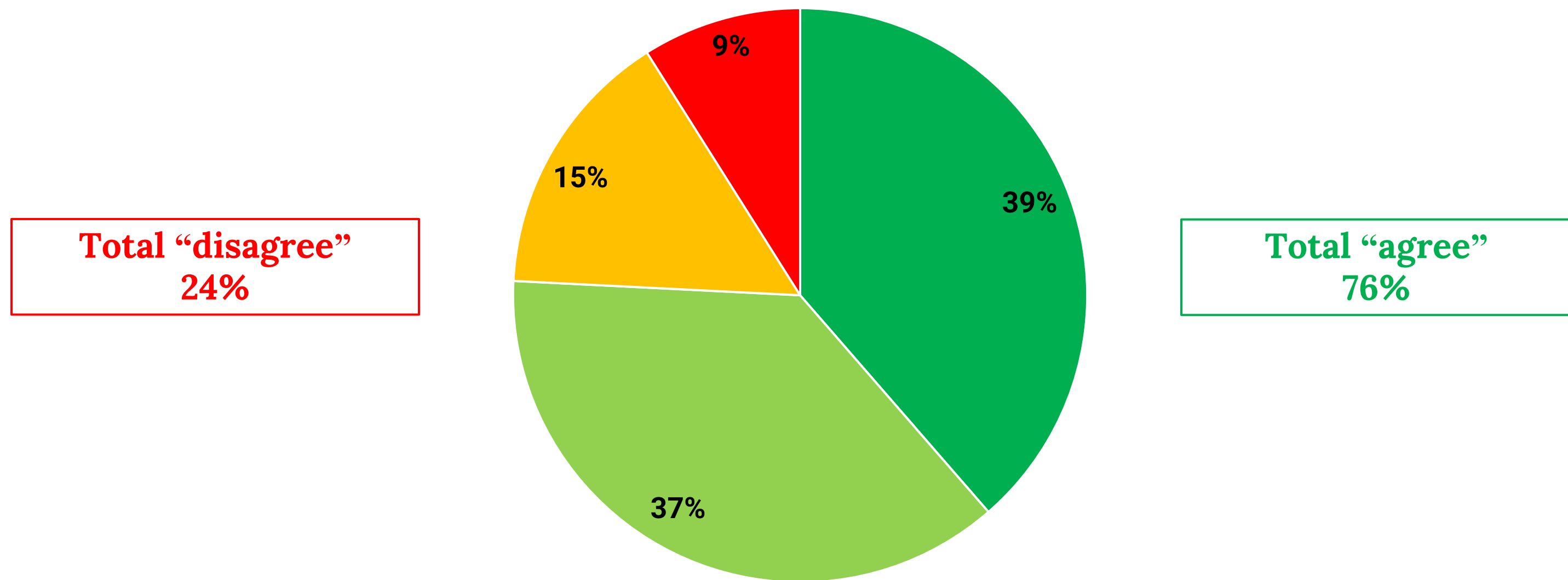


When you think about your own life over the next five years, are you generally optimistic or pessimistic?

Country	Very optimistic	Somewhat optimistic	Somewhat pessimistic	Very pessimistic	Optimistic	Pessimistic
Poland	7%	63%	20%	10%	70%	30%
Germany	6%	51%	35%	8%	57%	43%
Spain	4%	35%	51%	10%	39%	61%
France	3%	29%	52%	16%	32%	68%
Belgium	1%	31%	57%	11%	32%	68%
Italy	2%	28%	57%	13%	30%	70%
Total	4%	40%	45%	11%	44%	56%

To what extent do you agree or disagree with the following statement: “There is a shared European way of life that is worth defending.”

■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree

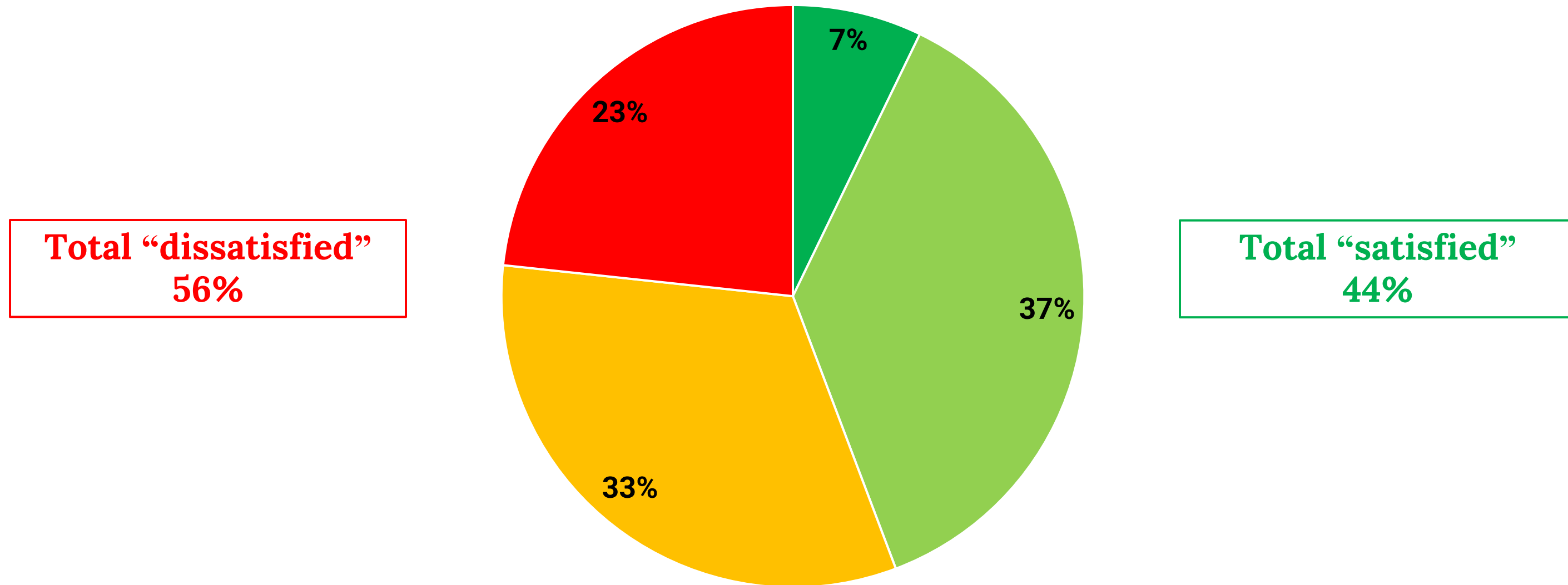


To what extent do you agree or disagree with the following statement: “There is a shared European way of life that is worth defending.”

Country	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	Agree	Disagree
Germany	52%	32%	10%	6%	84%	16%
Belgium	36%	45%	12%	7%	81%	19%
Spain	44%	37%	13%	6%	81%	19%
Poland	34%	44%	13%	9%	78%	22%
Italy	35%	38%	16%	11%	73%	27%
France	25%	38%	24%	13%	63%	37%
Total	39%	37%	15%	9%	76%	24%

How satisfied are you with the way democracy works in your country?

■ Very satisfied ■ Fairly satisfied ■ Fairly dissatisfied ■ Very dissatisfied



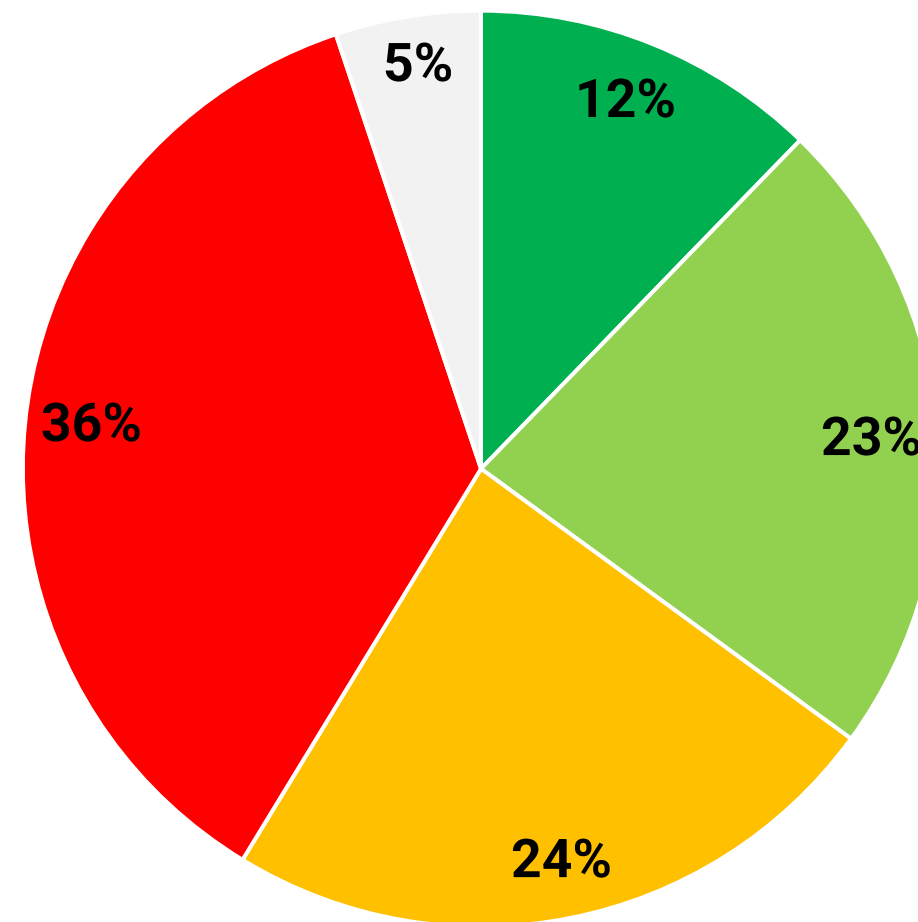
How satisfied are you with the way democracy works in your country?

Country	Very satisfied	Fairly satisfied	Fairly dissatisfied	Very dissatisfied	Satisfied	Dissatisfied
Germany	9%	43%	27%	21%	52%	48%
Poland	10%	41%	29%	20%	51%	49%
Belgium	6%	42%	37%	15%	48%	52%
Spain	6%	36%	33%	25%	42%	58%
Italy	6%	36%	37%	21%	42%	58%
France	5%	28%	36%	31%	33%	67%
Total	7%	37%	33%	23%	44%	56%

For each of the following countries or entities, please indicate whether you see it primarily as a partner, a competitor, or a threat to Europe.

United States

■ Close ally ■ Partner ■ Competitor ■ Threat ■ Don't know



**Total
“Competitor/Threat”
60%**

**Total
“Close ally/Partner”
35%**

For each of the following countries or entities, please indicate whether you see it primarily as a partner, a competitor, or a threat to Europe.

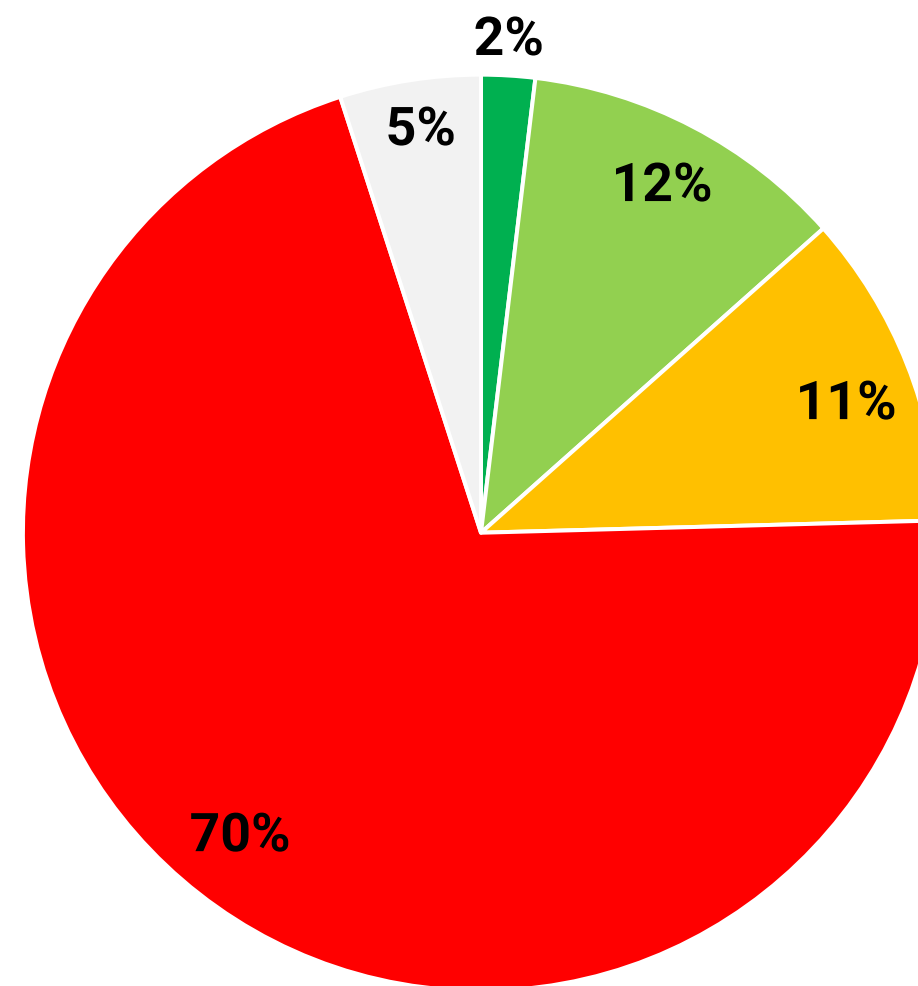
United States

Country	Close ally	Partner	Competitor	Threat	Don't know	Close ally / Partner	Competitor / Threat
Spain	17%	13%	16%	51%	3%	30%	67%
Belgium	8%	20%	25%	42%	5%	28%	67%
France	10%	20%	29%	37%	4%	30%	66%
Italy	11%	22%	18%	46%	3%	33%	64%
Germany	8%	26%	32%	30%	4%	34%	62%
Poland	24%	34%	13%	13%	16%	58%	26%
Total	12%	23%	24%	36%	5%	35%	60%

For each of the following countries or entities, please indicate whether you see it primarily as a partner, a competitor, or a threat to Europe.

Russia

■ Close ally ■ Partner ■ Competitor ■ Threat ■ Don't know



**Total
“Competitor/Threat”
81%**

**Total
“Close ally/Partner”
14%**

For each of the following countries or entities, please indicate whether you see it primarily as a partner, a competitor, or a threat to Europe.

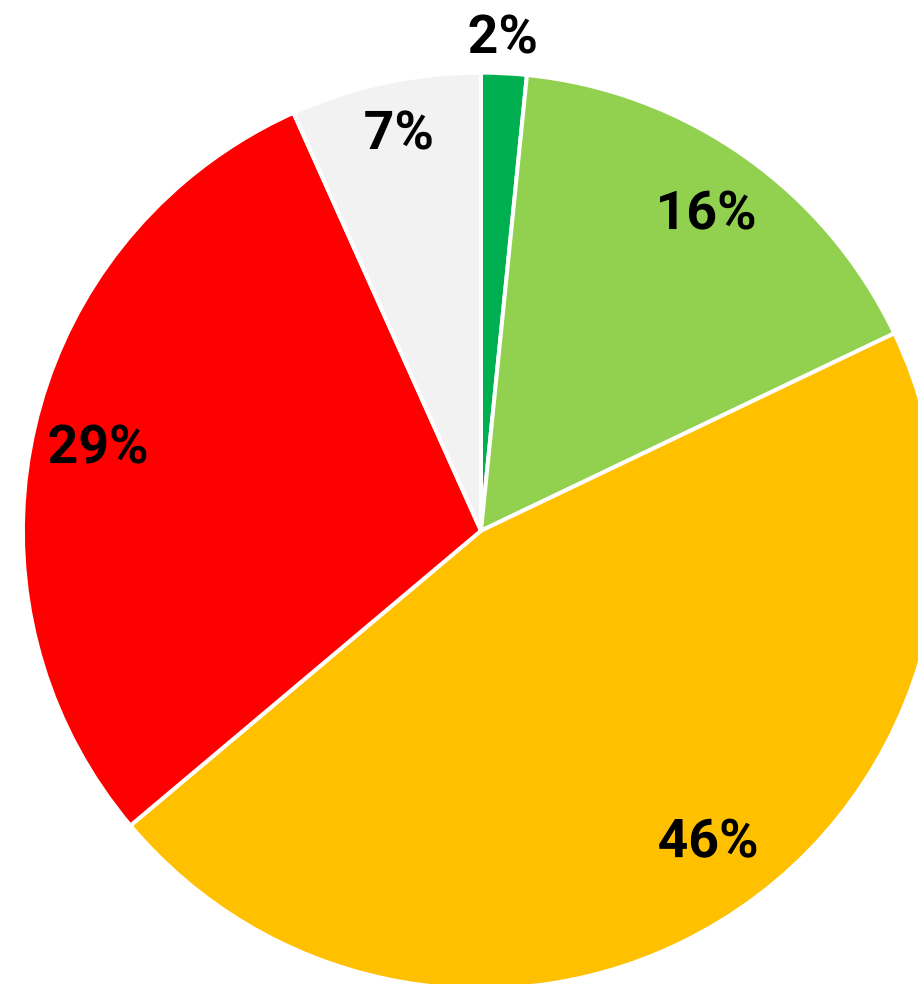
Russia

Country	Close ally	Partner	Competitor	Threat	Don't know	Close ally / Partner	Competitor / Threat
Poland	0%	2%	3%	92%	3%	2%	95%
Spain	2%	5%	13%	74%	6%	7%	87%
Belgium	0%	9%	9%	77%	5%	9%	86%
France	2%	11%	12%	69%	6%	13%	81%
Germany	2%	13%	9%	72%	4%	15%	81%
Italy	3%	23%	17%	51%	6%	26%	68%
Total	2%	12%	11%	70%	5%	14%	81%

For each of the following countries or entities, please indicate whether you see it primarily as a partner, a competitor, or a threat to Europe.

China

■ Close ally ■ Partner ■ Competitor ■ Threat ■ Don't know



**Total
“Competitor/Threat”
75%**

**Total
“Close ally/Partner”
18%**

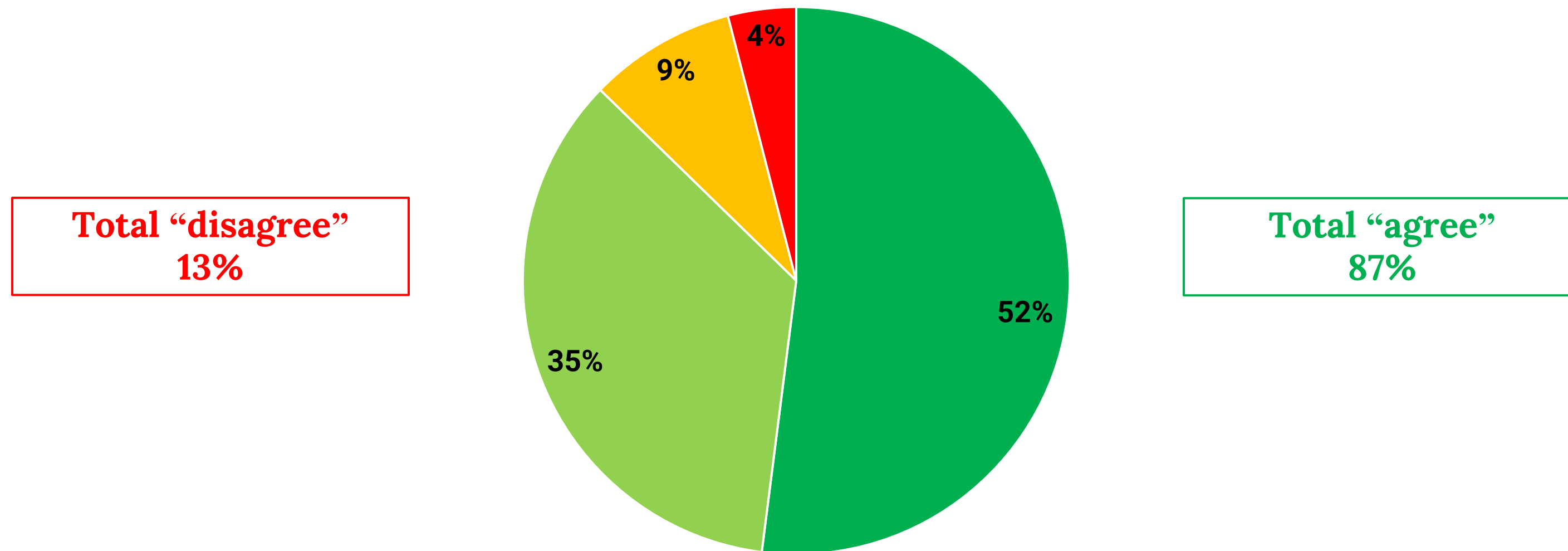
For each of the following countries or entities, please indicate whether you see it primarily as a partner, a competitor, or a threat to Europe.

China

Country	Close ally	Partner	Competitor	Threat	Don't know	Close ally / Partner	Competitor / Threat
Germany	1%	11%	62%	23%	3%	12%	85%
France	1%	9%	41%	43%	6%	10%	84%
Belgium	1%	12%	44%	38%	5%	13%	82%
Spain	5%	21%	43%	25%	6%	26%	68%
Italy	2%	25%	45%	20%	8%	27%	65%
Poland	1%	21%	27%	37%	14%	22%	64%
Total	2%	16%	46%	29%	7%	18%	75%

To what extent do you agree or disagree with the following statement: “Europe should become more self-reliant and less dependent on other major powers, even if that comes at a higher economic cost.”

■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree



To what extent do you agree or disagree with the following statement: “Europe should become more self-reliant and less dependent on other major powers, even if that comes at a higher economic cost.”

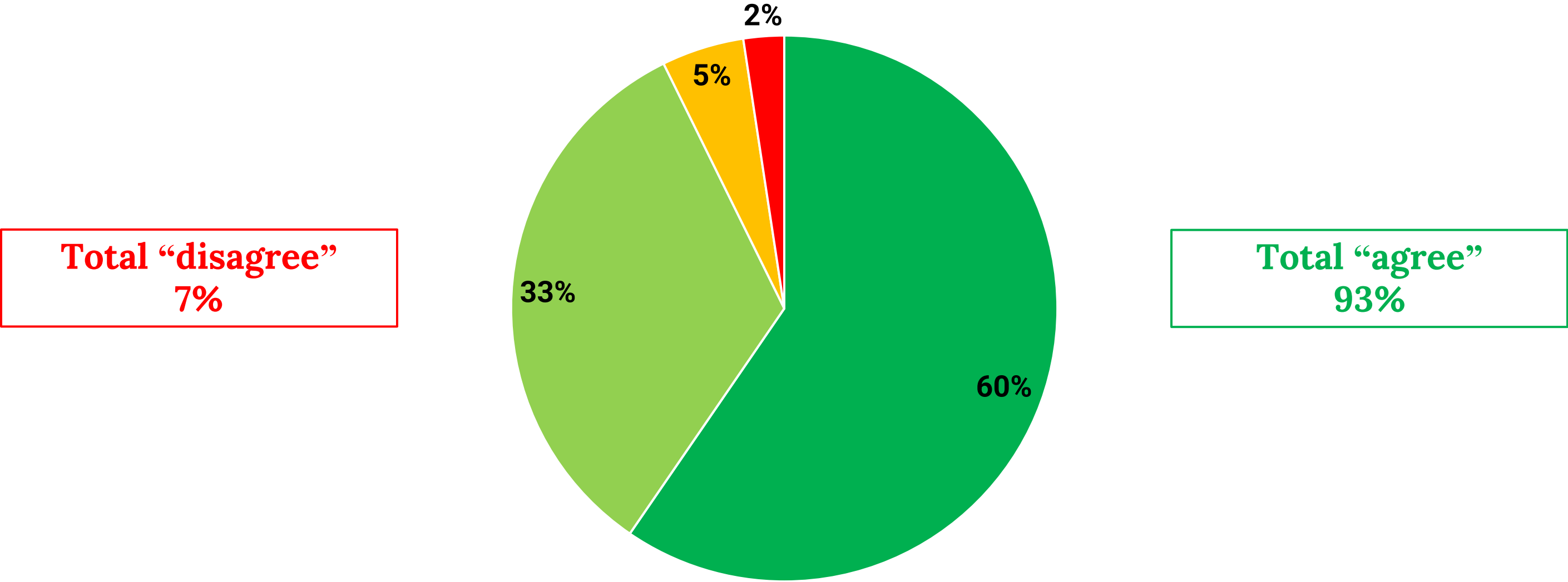
Country	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	Agree	Disagree
Spain	60%	34%	5%	1%	94%	6%
Belgium	66%	27%	5%	2%	93%	7%
Germany	64%	27%	6%	3%	91%	9%
Poland	42%	47%	10%	1%	89%	11%
France	48%	38%	8%	6%	86%	14%
Italy	35%	38%	16%	11%	73%	27%
Total	52%	35%	9%	4%	87%	13%

Cluster17

**ENERGY: AFFORDABILITY, ENERGY
TRANSITION, INDEPENDENCE &
SUPPLY SECURITY**

To what extent do you agree or disagree with the following statement: “Europe needs to build its own large-scale companies capable of competing on a global scale.”

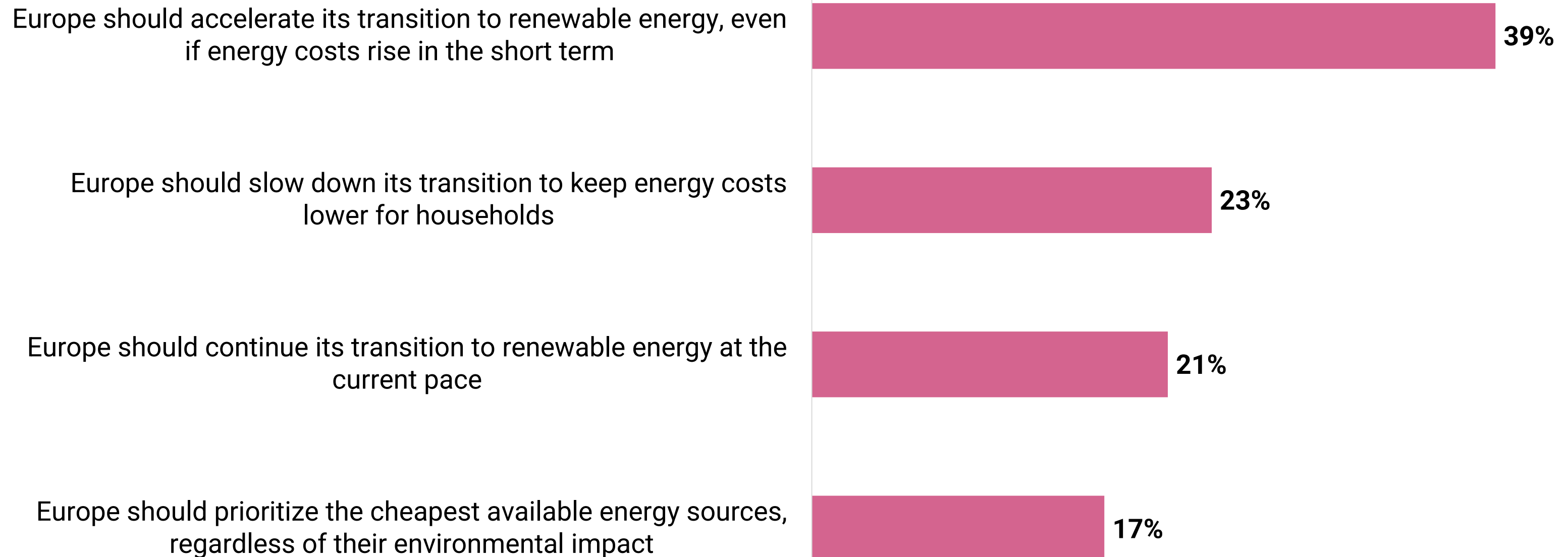
Strongly agree Somewhat agree Somewhat disagree Strongly disagree



To what extent do you agree or disagree with the following statement: “Europe needs to build its own large-scale companies capable of competing on a global scale.”

Country	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	Agree	Disagree
Belgium	71%	26%	3%	0%	97%	3%
Spain	69%	27%	3%	1%	96%	4%
Poland	52%	42%	3%	3%	94%	6%
Italy	62%	32%	4%	2%	94%	6%
France	59%	32%	5%	4%	91%	9%
Germany	55%	35%	8%	2%	90%	10%
Total	60%	33%	5%	2%	93%	7%

Which of the following statements comes closest to your view on Europe's transition to renewable energy sources?

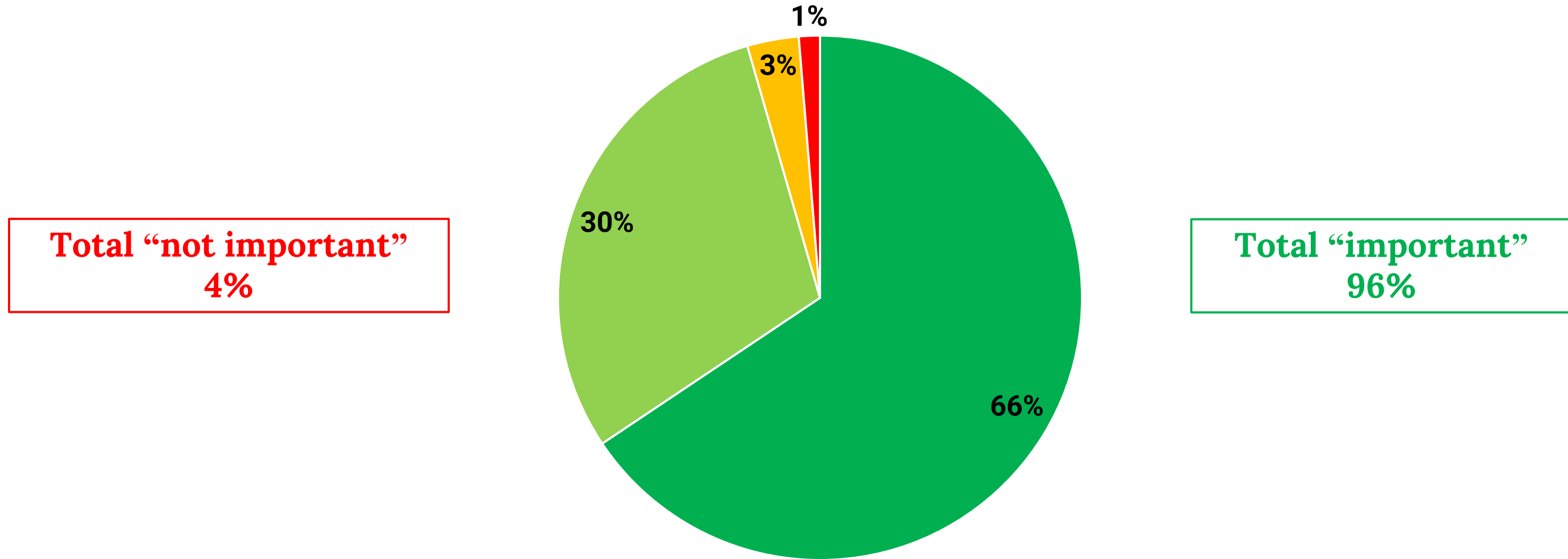


Which of the following statements comes closest to your view on Europe’s transition to renewable energy sources?

Country	Europe should accelerate its transition to renewable energy, even if energy costs rise in the short term	Europe should continue its transition to renewable energy at the current pace	Europe should slow down its transition to keep energy costs lower for households	Europe should prioritize the cheapest available energy sources, regardless of their environmental impact
Italy	49%	17%	19%	15%
Germany	43%	15%	22%	20%
Belgium	40%	21%	23%	16%
Spain	38%	19%	26%	17%
France	35%	24%	27%	14%
Poland	27%	34%	20%	19%
Total	39%	21%	23%	17%

How important is it for Europe to invest more in its own energy infrastructure (such as pipelines, fuel production facilities and storage)?

■ Very important ■ Somewhat important ■ Not very important ■ Not important at all

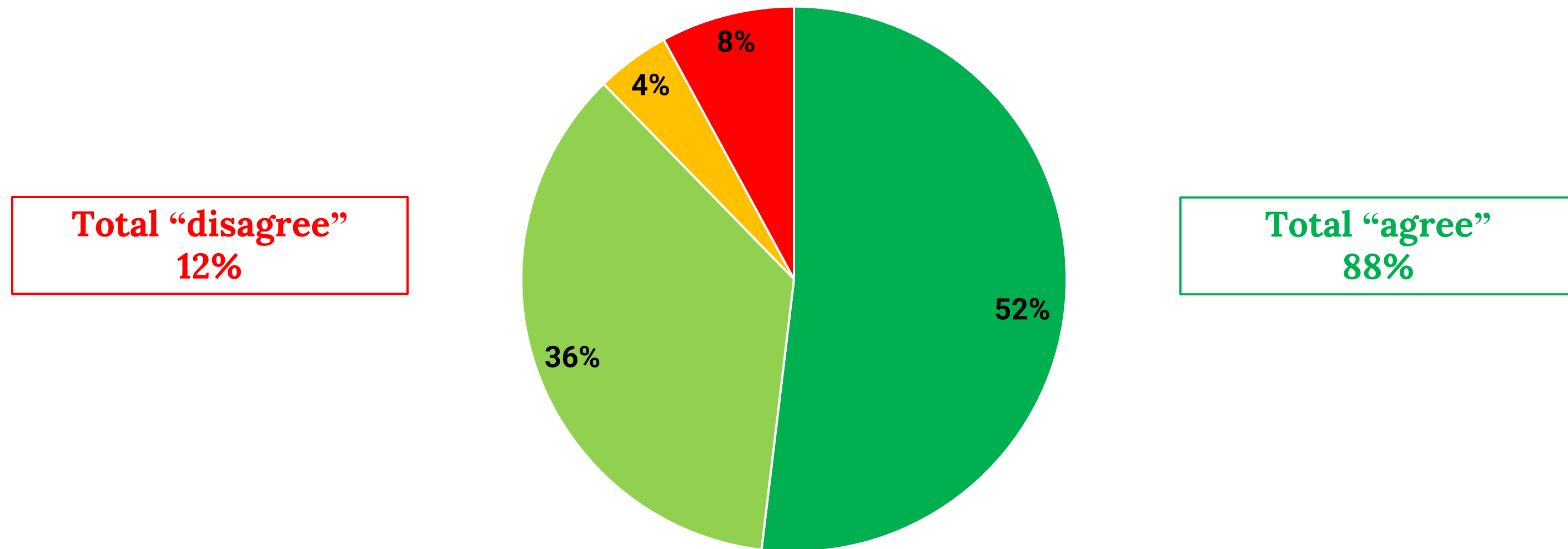


How important is it for Europe to invest more in its own energy infrastructure (such as pipelines, fuel production facilities and storage)?

Country	Very important	Somewhat important	Not very important	Not important at all	Important	Not important
Germany	78%	21%	1%	0%	99%	1%
Spain	70%	28%	1%	1%	98%	2%
Belgium	65%	32%	2%	1%	97%	3%
Italy	65%	29%	5%	1%	94%	6%
Poland	57%	37%	3%	3%	94%	6%
France	53%	39%	6%	2%	92%	8%
Total	66%	30%	3%	1%	96%	4%

To what extent do you agree or disagree with the following statement: “Europe should produce its own energy, even if it requires some additional effort and investment.”

■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree



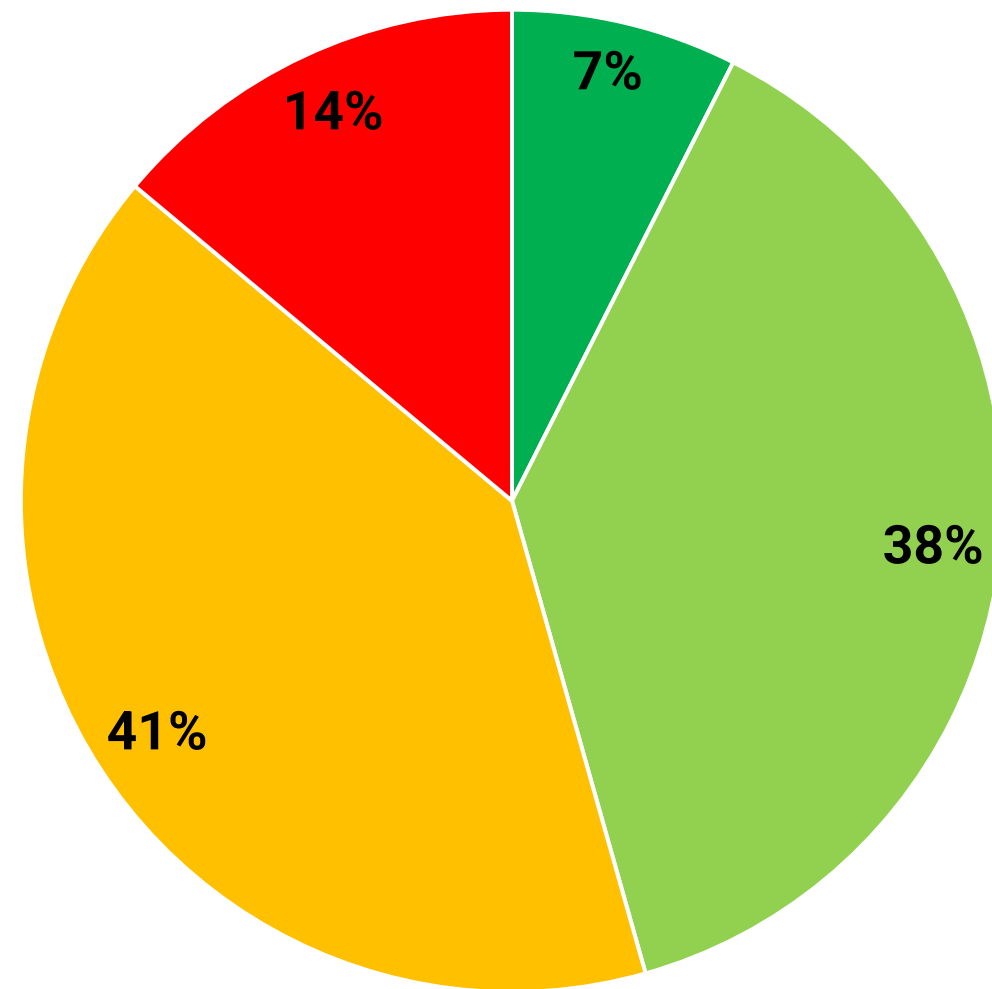
To what extent do you agree or disagree with the following statement: “Europe should produce its own energy, even if it requires some additional effort and investment.”

Country	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	Agree	Disagree
Poland	54%	43%	3%	0%	97%	3%
Spain	61%	36%	3%	0%	97%	3%
Belgium	61%	36%	2%	1%	97%	3%
Italy	58%	38%	3%	1%	96%	4%
Germany	64%	28%	6%	2%	92%	8%
France	53%	39%	6%	2%	92%	8%
Grand total	58%	36%	5%	1%	94%	6%

How confident are you that your country's energy supply is reliable and protected from disruptions or attacks?

■ Very confident ■ Fairly confident ■ Not very confident ■ Not confident at all

Total "not confident"
55%



Total "confident"
45%

How confident are you that your country's energy supply is reliable and protected from disruptions or attacks?

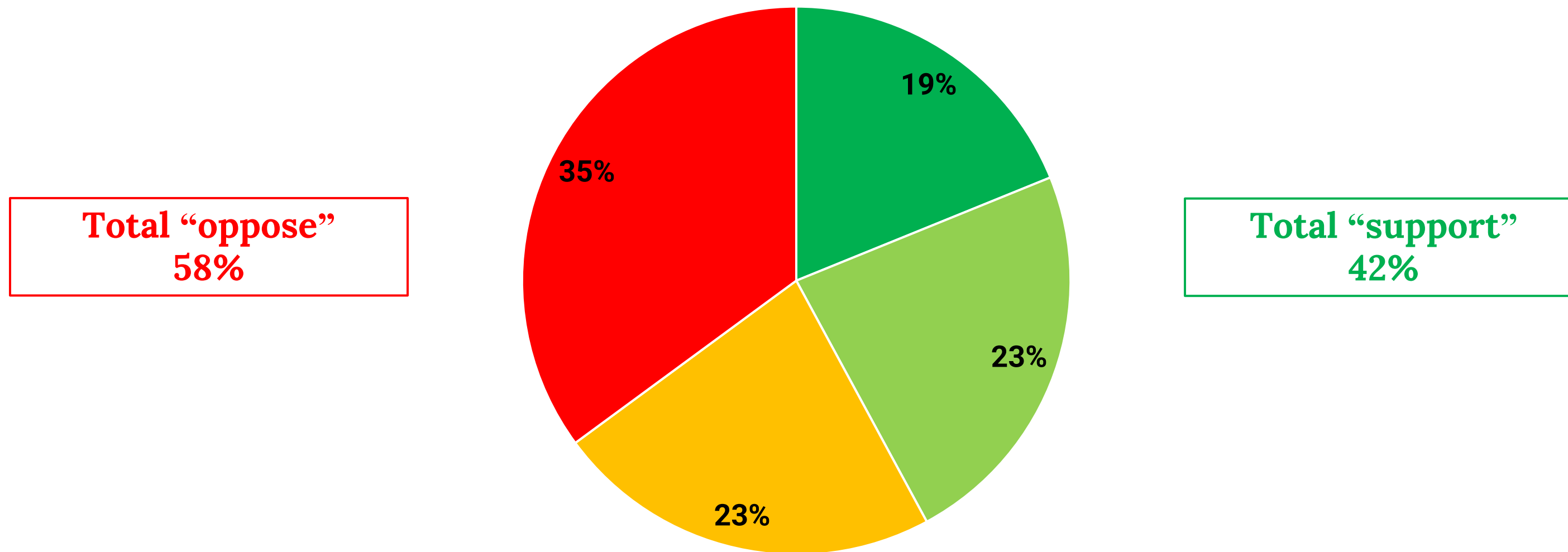
Country	Very confident	Fairly confident	Not very confident	Not confident at all	Confident	Not confident
Poland	15%	45%	30%	10%	60%	40%
Germany	9%	40%	39%	12%	49%	51%
Spain	5%	38%	37%	20%	43%	57%
Italy	6%	35%	49%	10%	41%	59%
France	4%	36%	43%	17%	40%	60%
Belgium	3%	34%	45%	18%	37%	63%
Total	7%	38%	41%	14%	45%	55%

Cluster17

**MOBILITY: ELECTRIC VEHICLES,
PUBLIC TRANSPORT, COMPETITION
& AUTONOMOUS DRIVING**

The European Union has set a target to end the sale of new petrol and diesel cars by 2035. To what extent do you support or oppose this plan?

■ Strongly support ■ Somewhat support ■ Somewhat oppose ■ Strongly oppose



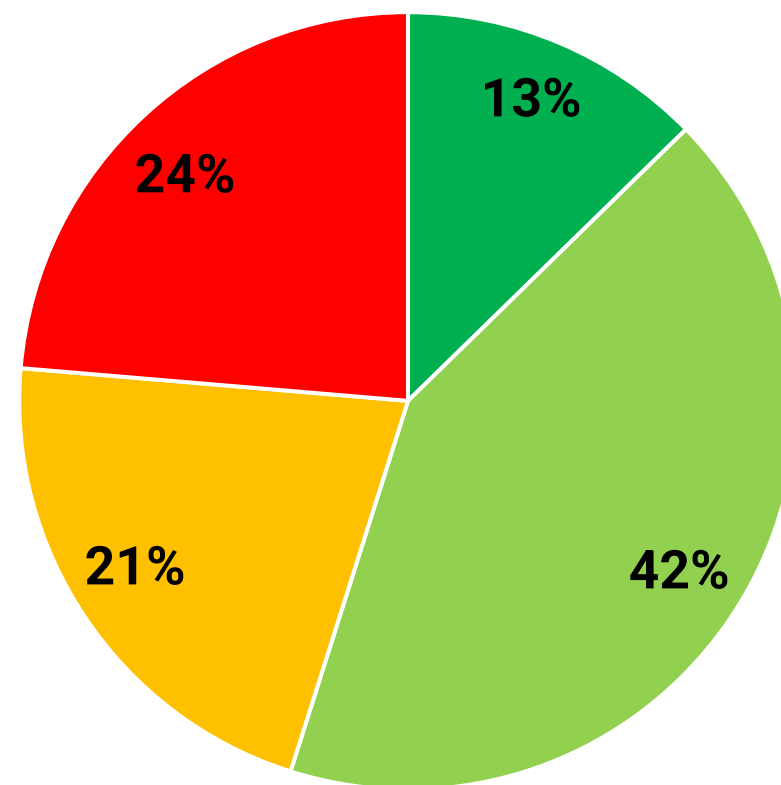
The European Union has set a target to end the sale of new petrol and diesel cars by 2035. To what extent do you support or oppose this plan?

Country	Strongly support	Somewhat support	Somewhat oppose	Strongly oppose	Support	Oppose
Poland	16%	31%	28%	25%	47%	53%
Italy	18%	27%	21%	34%	45%	55%
Spain	20%	21%	25%	34%	41%	59%
France	12%	29%	18%	41%	41%	59%
Germany	25%	15%	24%	36%	40%	60%
Belgium	14%	14%	29%	43%	28%	72%
Total	19%	23%	23%	35%	42%	58%

Some non-European car manufacturers, particularly from China, are entering the European market with electric vehicles at lower prices. Which of the following statements comes closest to your view?

- This is very positive for Europe – more competition and lower prices benefit consumers
- This is somewhat positive, though it brings some challenges for European industry
- This is somewhat negative – the risks to European manufacturers outweigh the benefits for consumers
- This is very negative – it is a serious threat to Europe's automotive industry and economy

**Total “negative”
45%**



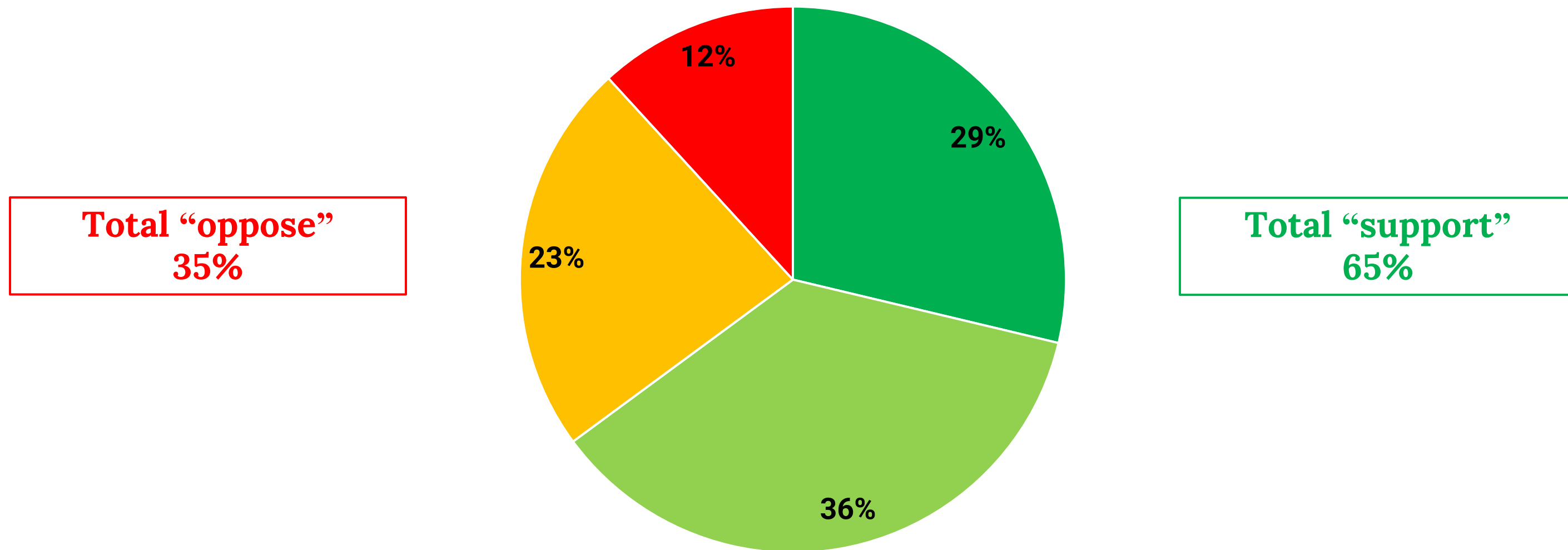
**Total “positive”
55%**

Some non-European car manufacturers, particularly from China, are entering the European market with electric vehicles at lower prices. Which of the following statements comes closest to your view?

Country	This is very positive for Europe — more competition and lower prices benefit consumers	This is somewhat positive, though it brings some challenges for European industry	This is somewhat negative — the risks to European manufacturers outweigh the benefits for consumers	This is very negative — it is a serious threat to Europe's automotive industry and economy	Positive	Negative
Spain	15%	51%	16%	18%	66%	34%
Poland	15%	49%	18%	18%	64%	36%
Italy	18%	42%	22%	18%	60%	40%
Germany	10%	47%	23%	20%	57%	43%
Belgium	11%	33%	26%	30%	44%	56%
France	8%	28%	25%	39%	36%	64%
Total	13%	42%	21%	24%	55%	45%

Would you support or oppose your country investing significantly more public money in making public transport more affordable and accessible, even if it required higher taxes?

■ Strongly support ■ Somewhat support ■ Somewhat oppose ■ Strongly oppose

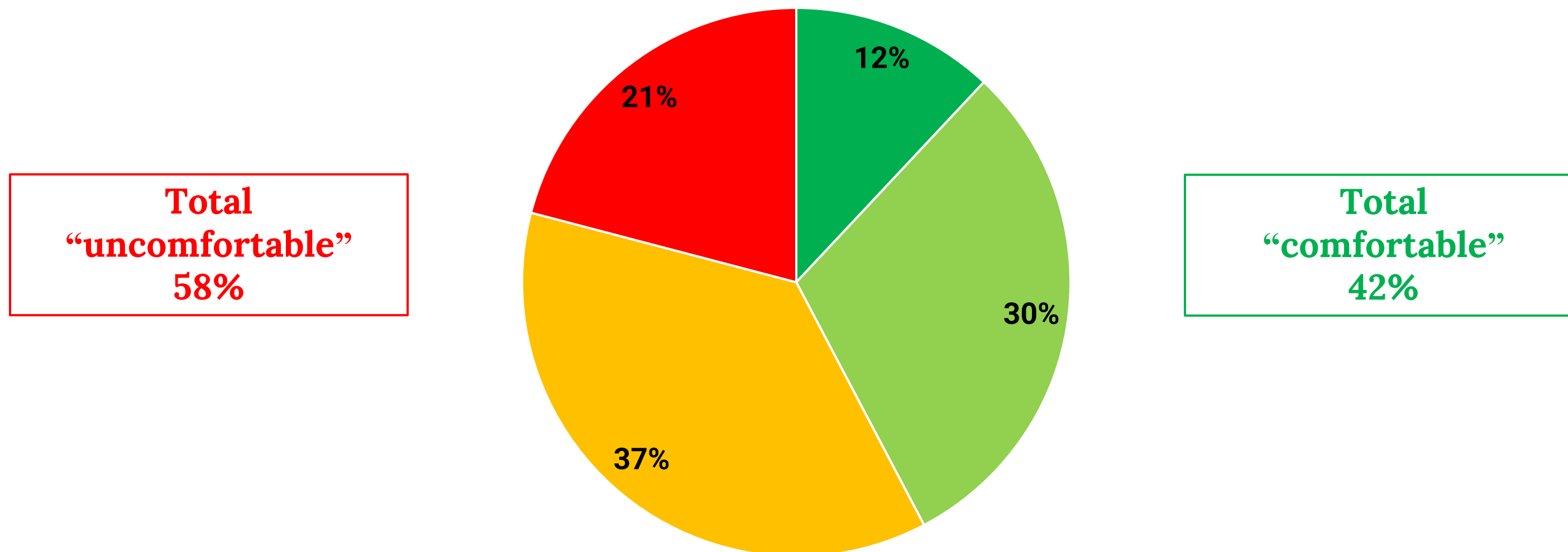


Would you support or oppose your country investing significantly more public money in making public transport more affordable and accessible, even if it required higher taxes?

Country	Strongly support	Somewhat support	Somewhat oppose	Strongly oppose	Support	Oppose
Italy	30%	41%	19%	10%	71%	29%
Poland	25%	44%	29%	2%	69%	31%
Spain	40%	28%	19%	13%	68%	32%
Germany	28%	36%	22%	14%	64%	36%
France	24%	35%	27%	14%	59%	41%
Belgium	22%	34%	27%	17%	56%	44%
Total	29%	36%	23%	12%	65%	35%

How comfortable would you feel about self-driving taxis or buses operating in your city or area?

■ Very comfortable ■ Somewhat comfortable ■ Somewhat uncomfortable ■ Very uncomfortable



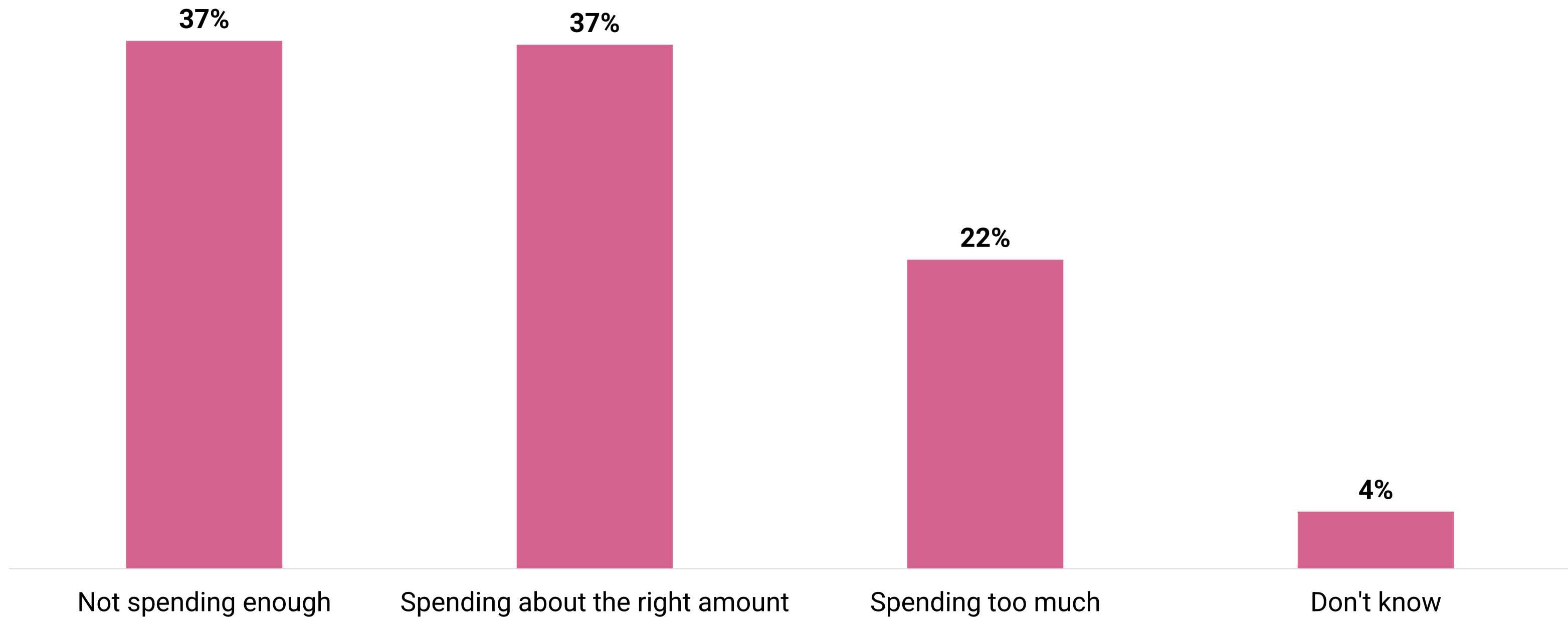
How comfortable would you feel about self-driving taxis or buses operating in your city or area?

Country	Very comfortable	Somewhat comfortable	Somewhat uncomfortable	Very uncomfortable	Comfortable	Uncomfortable
Italy	13%	37%	33%	17%	50%	50%
Germany	16%	33%	34%	17%	49%	51%
Poland	11%	29%	36%	24%	40%	60%
Spain	12%	26%	40%	22%	38%	62%
Belgium	9%	26%	41%	24%	35%	65%
France	7%	25%	41%	27%	32%	68%
Total	12%	30%	37%	21%	42%	58%

Cluster17

**DEFENSE & SECURITY:
SPENDING, EUROPEAN DEFENSE,
UKRAINE, ALLIANCES & STRATEGIC
AUTONOMY**

Do you think your country is currently spending too much, about the right amount, or not enough on its military and defense?

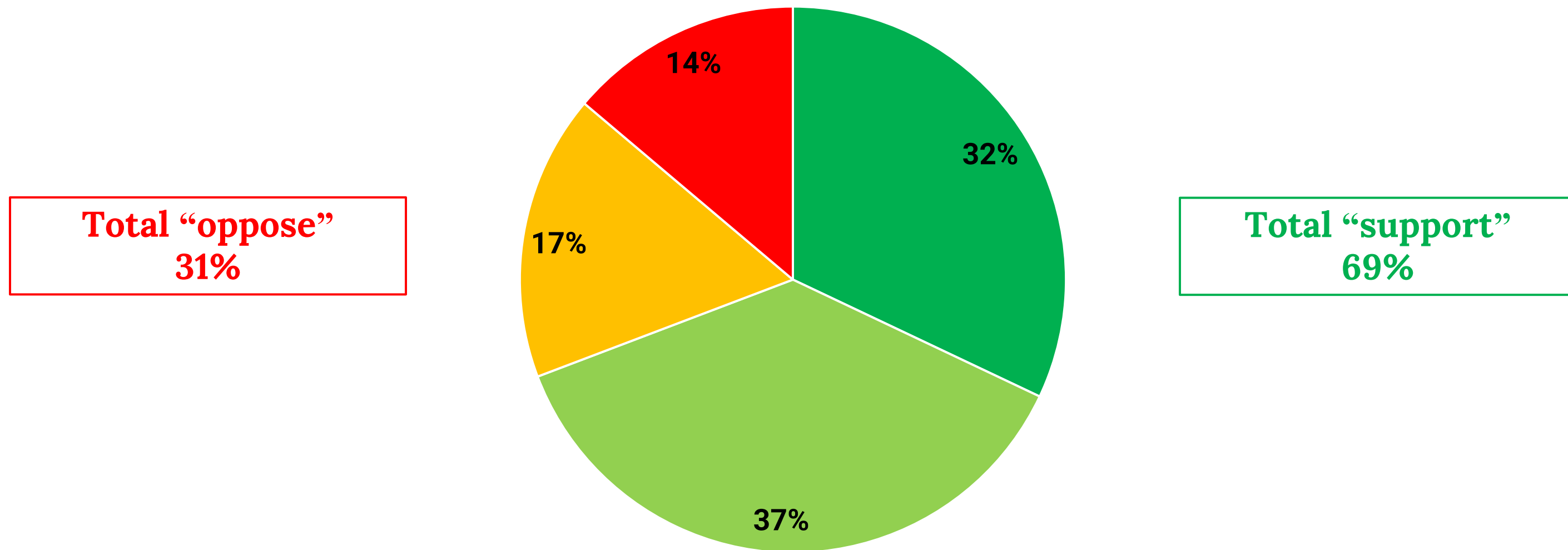


Do you think your country is currently spending too much, about the right amount, or not enough on its military and defense?

Country	Spending too much	Spending about the right amount	Not spending enough	Don't know
Italy	39%	30%	26%	5%
Belgium	30%	38%	27%	5%
Spain	20%	32%	43%	5%
Germany	19%	38%	40%	3%
France	17%	33%	44%	6%
Poland	9%	56%	30%	5%
Total	22%	37%	37%	4%

Would you support or oppose the creation of a joint European military force that would operate alongside national armies?

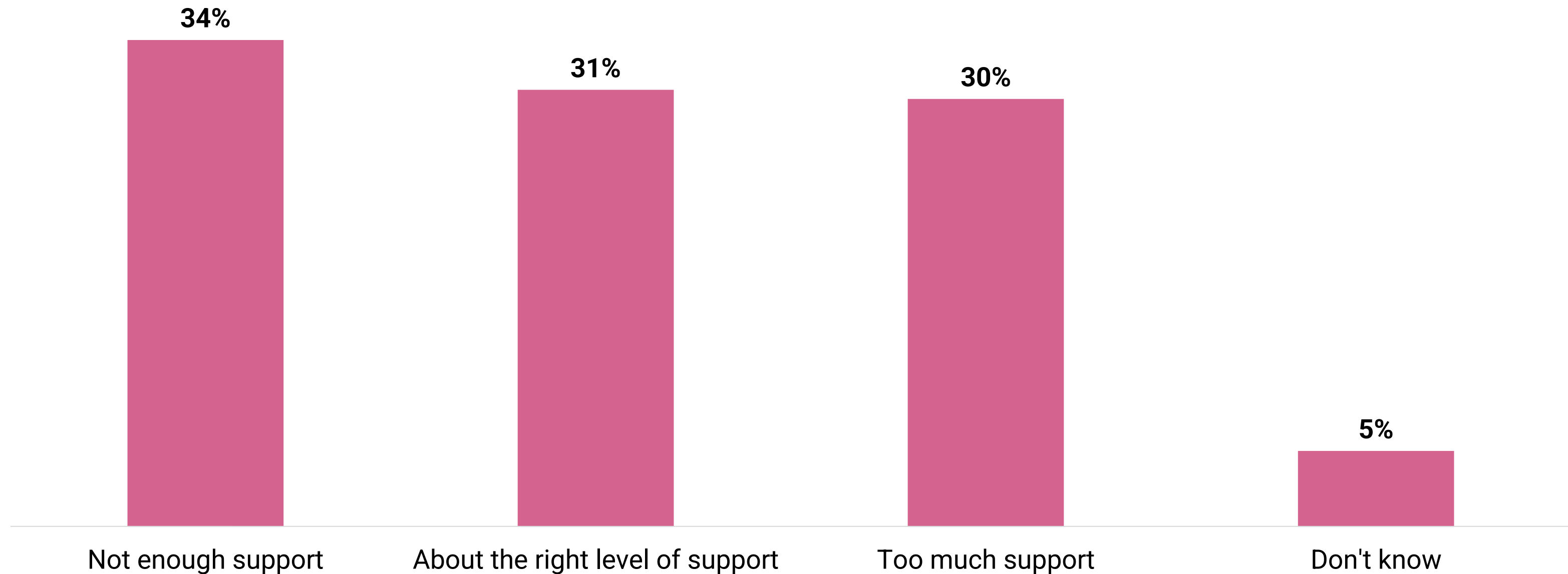
■ Strongly support ■ Somewhat support ■ Somewhat oppose ■ Strongly oppose



Would you support or oppose the creation of a joint European military force that would operate alongside national armies?

Country	Strongly support	Somewhat support	Somewhat oppose	Strongly oppose	Support	Oppose
Belgium	44%	39%	9%	8%	83%	17%
Spain	38%	39%	12%	11%	77%	23%
Italy	36%	36%	15%	13%	72%	28%
Germany	33%	38%	17%	12%	71%	29%
Poland	27%	38%	19%	16%	65%	35%
France	24%	36%	20%	20%	60%	40%
Total	32%	37%	17%	14%	69%	31%

Thinking about the conflict involving Ukraine, do you think Europe is currently providing too much support, about the right level of support, or not enough support to Ukraine?

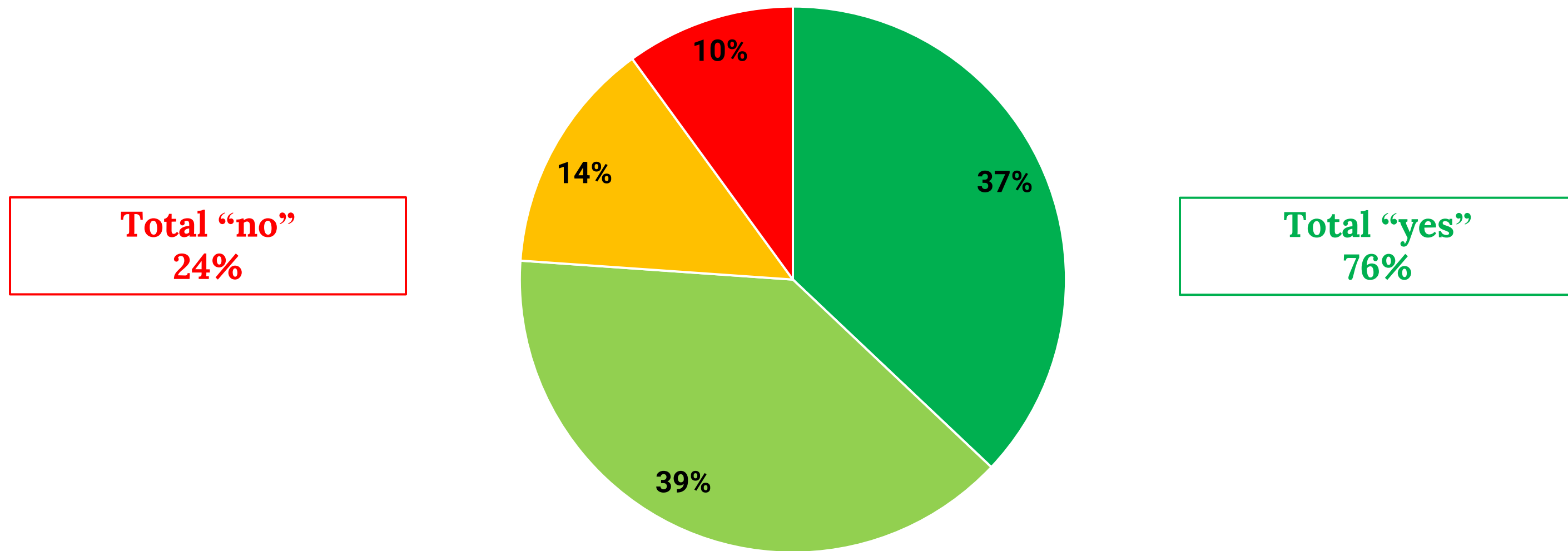


Thinking about the conflict involving Ukraine, do you think Europe is currently providing too much support, about the right level of support, or not enough support to Ukraine?

Country	Too much support	About the right level of support	Not enough support	Don't know
Italy	42%	28%	24%	6%
France	35%	28%	31%	6%
Germany	28%	25%	45%	2%
Belgium	27%	31%	38%	4%
Poland	23%	52%	20%	5%
Spain	17%	30%	42%	11%
Total	30%	31%	34%	5%

If a NATO member state were attacked by a foreign power, would you support your country sending military forces to defend it?

■ Yes, definitely ■ Yes, probably ■ Probably not ■ Definitely not

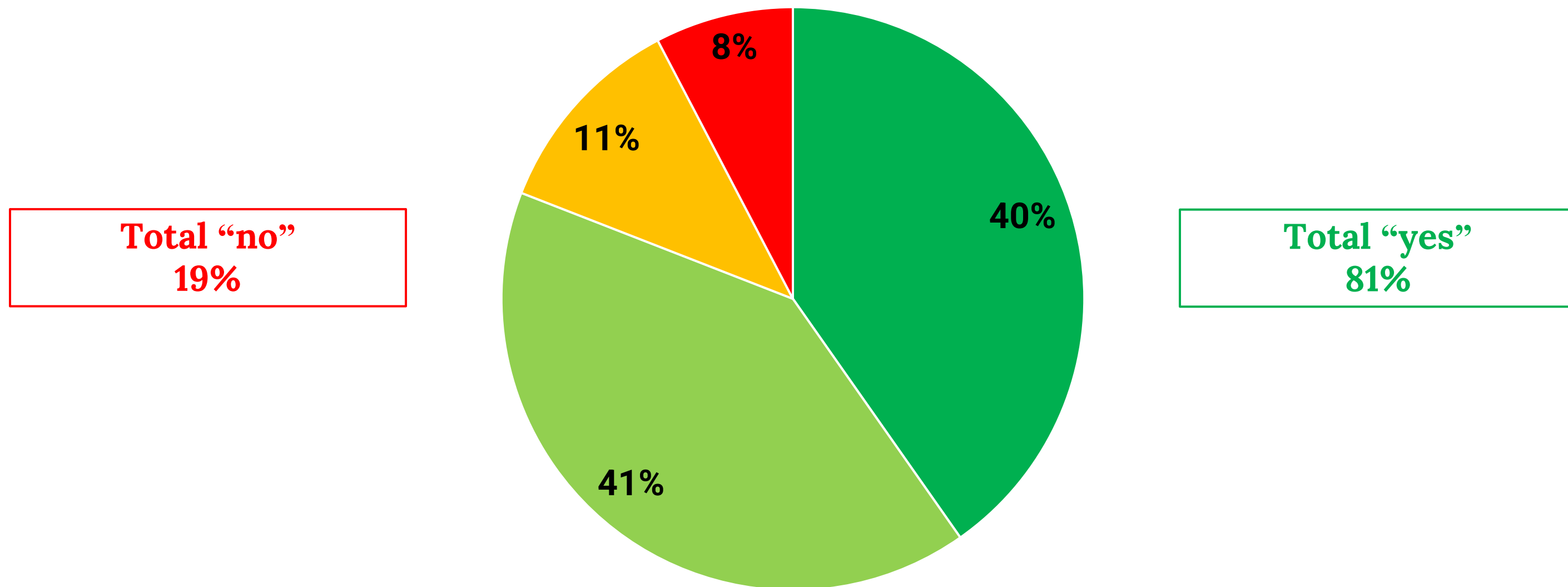


If a NATO member state were attacked by a foreign power, would you support your country sending military forces to defend it?

Country	Yes, definitely	Yes, probably	Probably not	Definitely not	Yes	No
Belgium	42%	44%	9%	5%	86%	14%
Poland	38%	46%	9%	7%	84%	16%
Germany	54%	30%	9%	7%	84%	16%
Spain	41%	41%	12%	6%	82%	18%
France	23%	46%	20%	11%	69%	31%
Italy	24%	39%	20%	17%	63%	37%
Total	37%	39%	14%	10%	76%	24%

If another EU member state were attacked by a foreign power, would you support your country sending military forces to defend it?

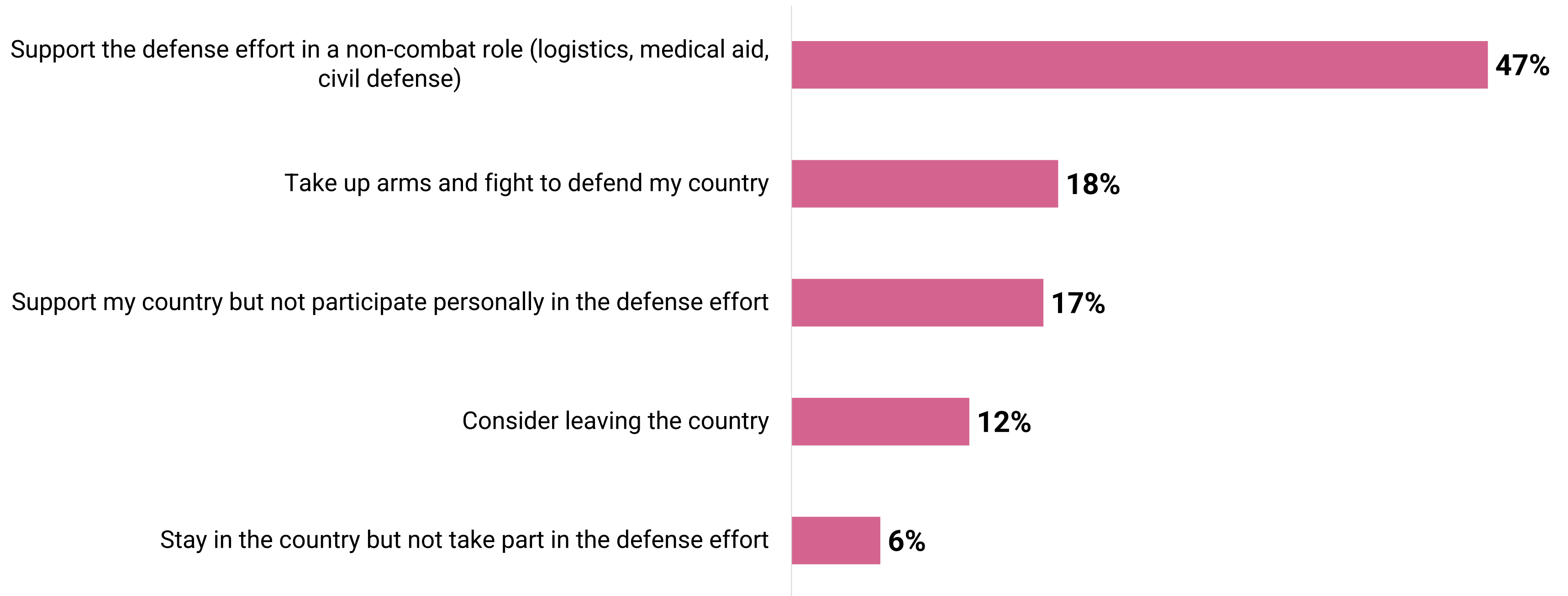
■ Yes, definitely ■ Yes, probably ■ Probably not ■ Definitely not



If another EU member state were attacked by a foreign power, would you support your country sending military forces to defend it?

Country	Yes, definitely	Yes, probably	Probably not	Definitely not	Yes	No
Spain	48%	41%	7%	4%	89%	11%
Belgium	45%	41%	9%	5%	86%	14%
Poland	34%	52%	7%	7%	86%	14%
Germany	52%	31%	11%	6%	83%	17%
France	30%	46%	15%	9%	76%	24%
Italy	32%	41%	15%	12%	73%	27%
Total	40%	41%	11%	8%	81%	19%

If your country were attacked by a foreign power, which of the following actions comes closest to what you would be willing to do?

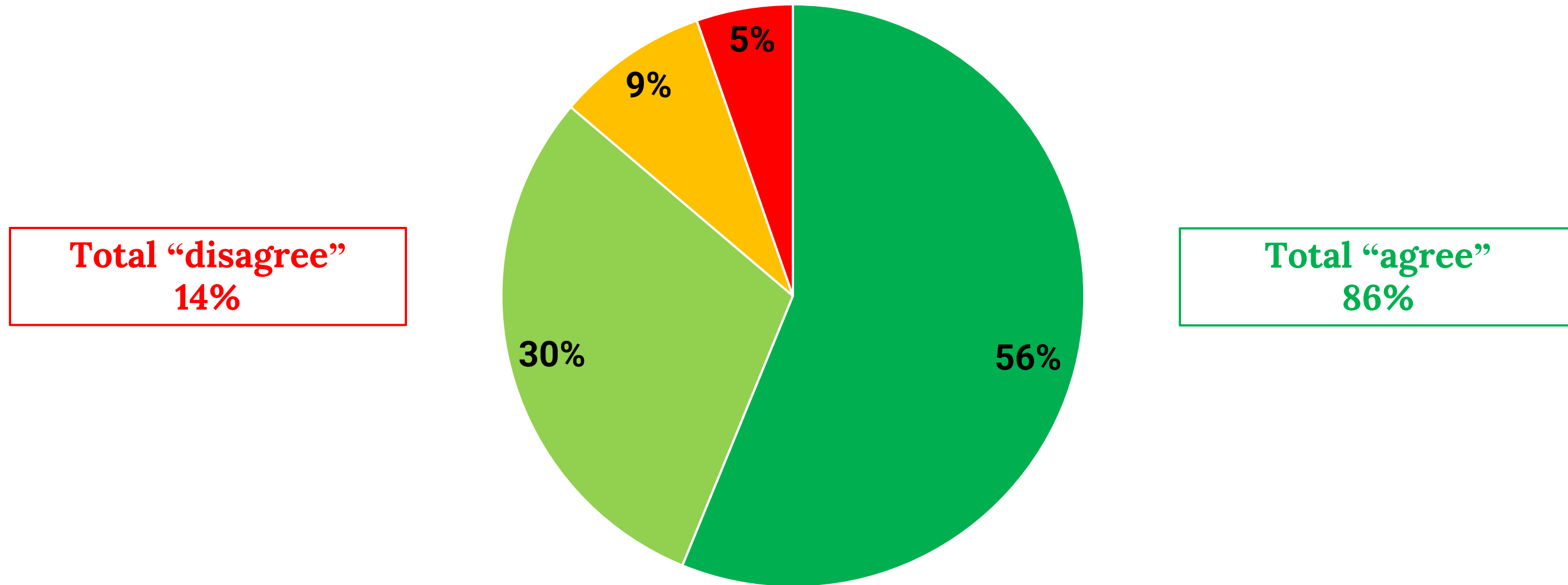


If your country were attacked by a foreign power, which of the following actions comes closest to what you would be willing to do?

Country	Support the defense effort in a non-combat role (logistics, medical aid, civil defense)	Take up arms and fight to defend my country	Support my country but not participate personally in the defense effort	Consider leaving the country	Stay in the country but not take part in the defense effort
France	53%	18%	18%	6%	5%
Spain	51%	17%	11%	16%	5%
Belgium	46%	16%	20%	8%	10%
Italy	44%	16%	18%	13%	9%
Germany	44%	23%	15%	14%	4%
Poland	41%	18%	26%	8%	7%
Total	47%	18%	17%	12%	6%

To what extent do you agree or disagree with the following statement: “Europe must develop its own defense capabilities.”

■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree

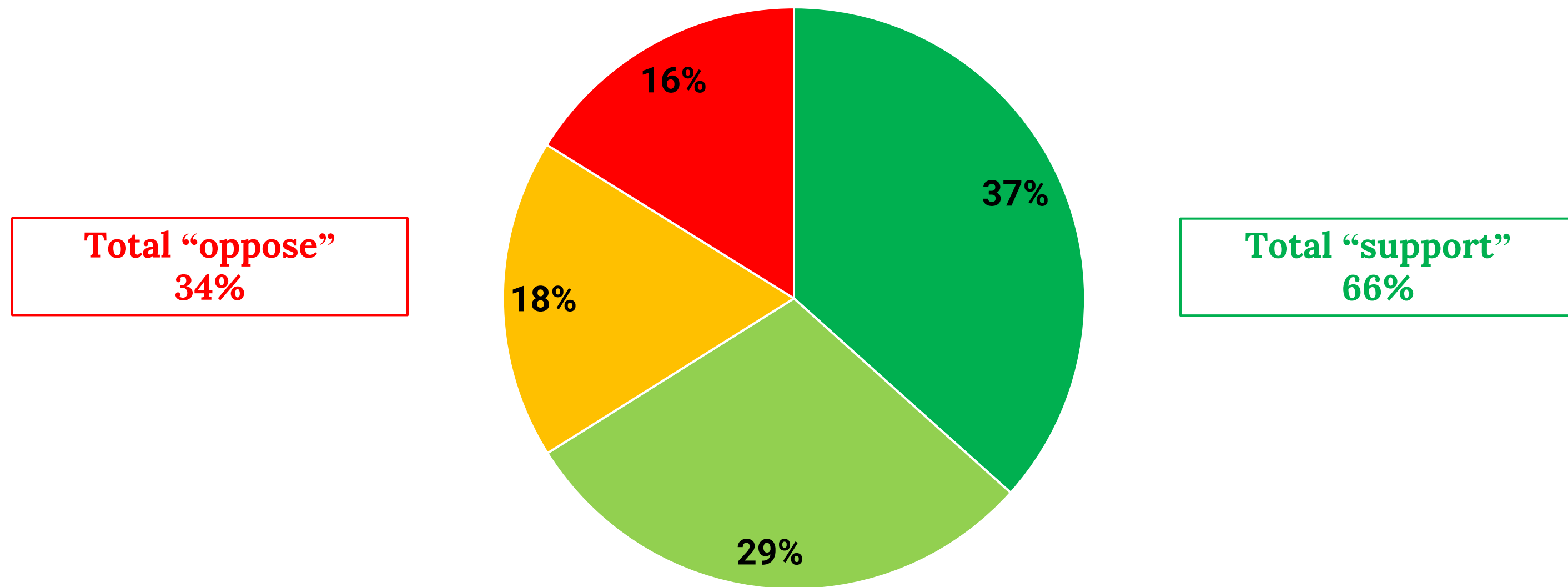


To what extent do you agree or disagree with the following statement: “Europe must develop its own defense capabilities.”

Country	Strongly agree	Somewhat agree	Somewhat disagree	Strongly disagree	Agree	Disagree
Poland	66%	29%	2%	3%	95%	5%
Belgium	69%	26%	4%	1%	95%	5%
Germany	68%	21%	5%	6%	89%	11%
Spain	47%	37%	14%	2%	84%	16%
France	50%	33%	10%	7%	83%	17%
Italy	45%	36%	11%	8%	81%	19%
Total	56%	30%	9%	5%	86%	14%

Would you support or oppose the introduction of mandatory military or civil service for young adults in your country?

■ Strongly support ■ Somewhat support ■ Somewhat oppose ■ Strongly oppose

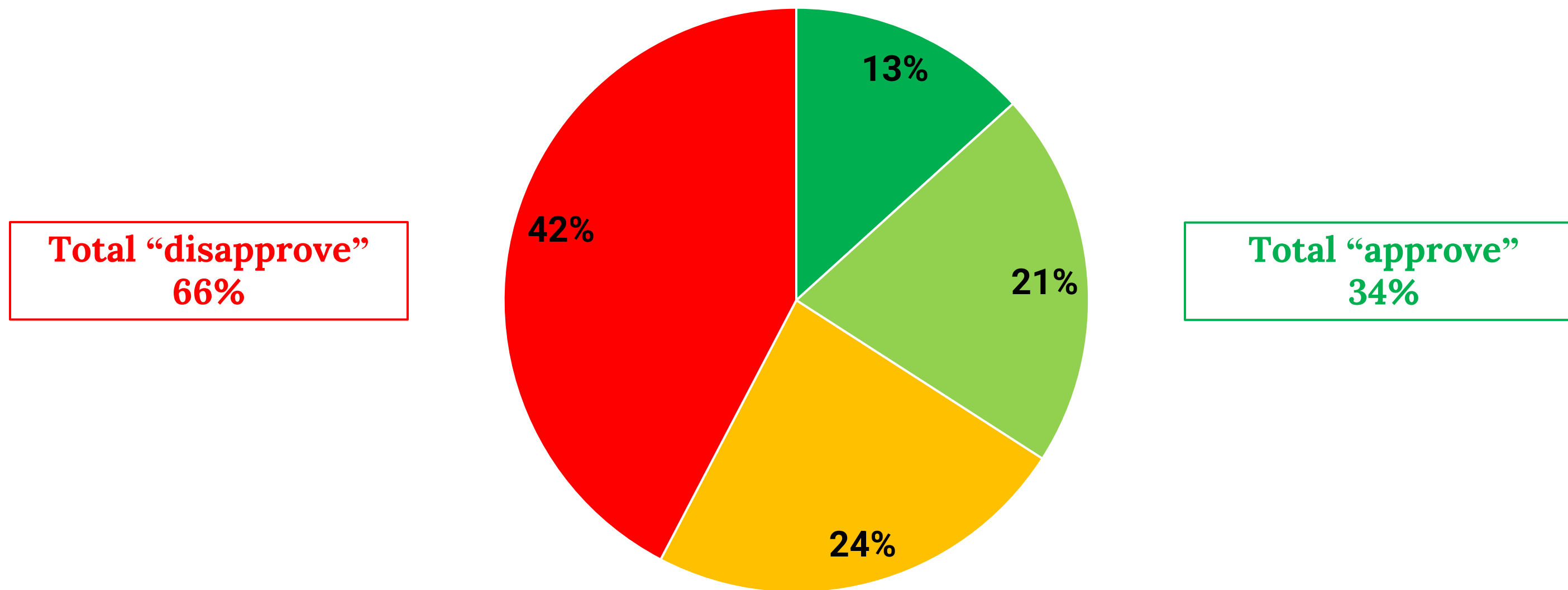


Would you support or oppose the introduction of mandatory military or civil service for young adults in your country?

Country	Strongly support	Somewhat support	Somewhat oppose	Strongly oppose	Support	Oppose
Germany	51%	27%	10%	12%	78%	22%
Belgium	46%	30%	16%	8%	76%	24%
France	39%	34%	16%	11%	73%	27%
Poland	28%	42%	22%	8%	70%	30%
Italy	29%	24%	22%	25%	53%	47%
Spain	22%	24%	26%	28%	46%	54%
Total	37%	29%	18%	16%	66%	34%

Overall, do you approve or disapprove of the military operation carried out by the United States and Israel against Iran?

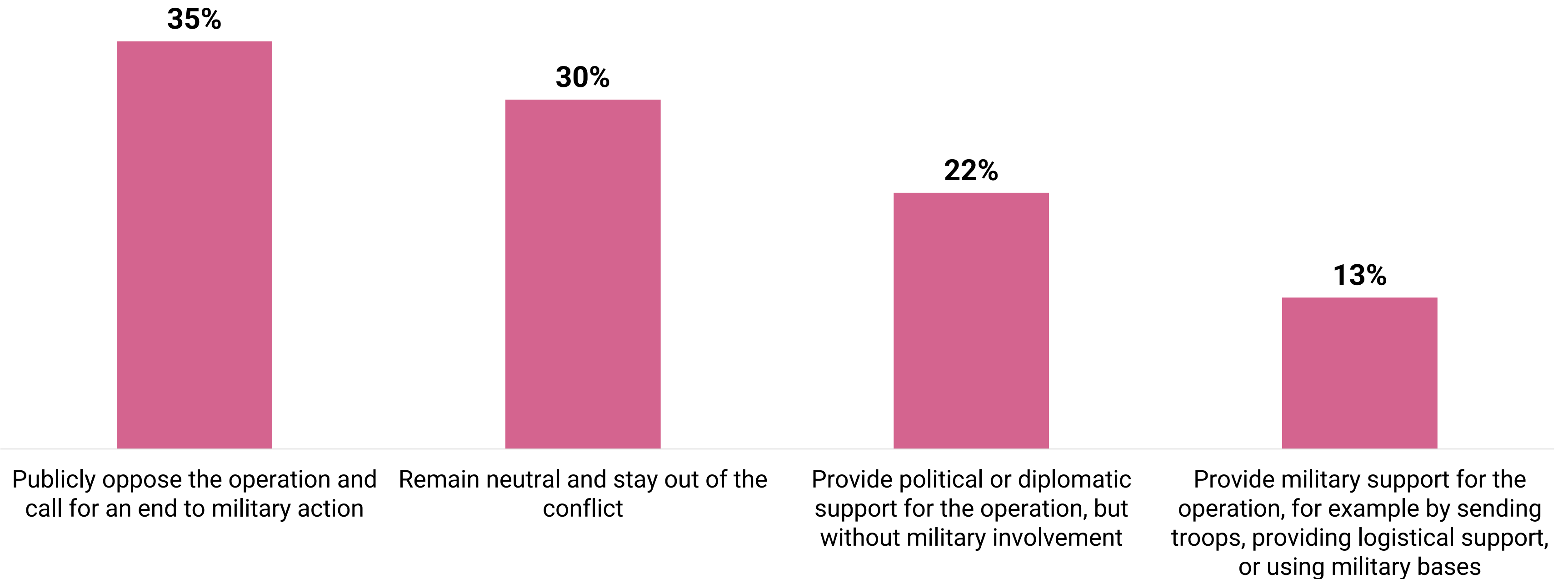
■ Strongly approve ■ Somewhat approve ■ Somewhat disapprove ■ Strongly disapprove



Overall, do you approve or disapprove of the military operation carried out by the United States and Israel against Iran?

Country	Strongly approve	Somewhat approve	Somewhat disapprove	Strongly disapprove	Approve	Disapprove
France	22%	25%	21%	32%	47%	53%
Poland	10%	26%	39%	25%	36%	64%
Germany	10%	24%	30%	36%	34%	66%
Spain	15%	15%	14%	56%	30%	70%
Belgium	11%	17%	24%	48%	28%	72%
Italy	10%	14%	14%	62%	24%	76%
Total	13%	21%	24%	42%	34%	66%

In your opinion, to what extent should your country be involved in the military operation led by the United States and Israel against Iran?



In your opinion, to what extent should your country be involved in the military operation led by the United States and Israel against Iran?

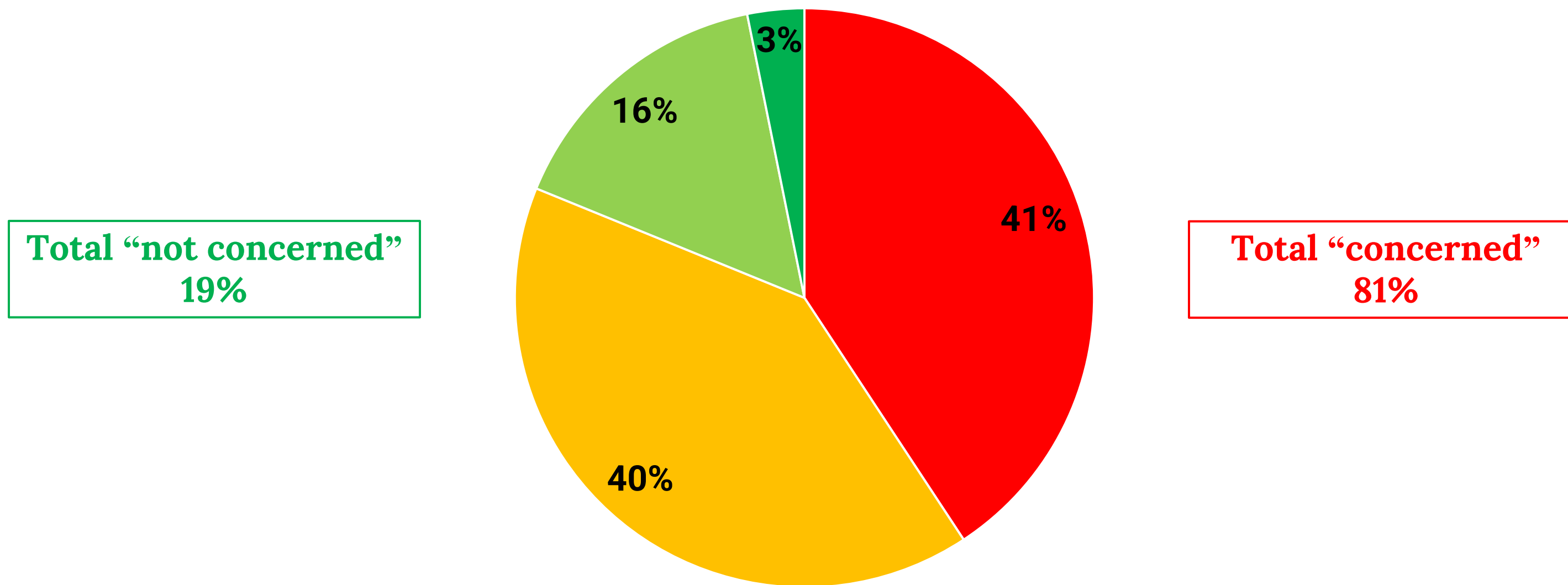
Country	Publicly oppose the operation and call for an end to military action	Remain neutral and stay out of the conflict	Provide political or diplomatic support for the operation, but without military involvement	Provide military support for the operation, for example by sending troops, providing logistical support, or using military bases
Italy	49%	26%	18%	7%
Spain	43%	22%	16%	19%
Germany	33%	29%	27%	11%
Belgium	32%	43%	15%	10%
Poland	29%	49%	12%	10%
France	26%	28%	29%	17%
Total	35%	30%	22%	13%

Cluster 17

**INEQUALITY, AFFORDABILITY
& SOCIETY: COST OF LIVING,
GOVERNMENT ACTION, SPENDING
TRADE-OFFS & MIGRATION**

Given the current military conflict involving Iran, how concerned are you about a significant increase in your household gas and energy bills?

■ Very concerned ■ Somewhat concerned ■ Not very concerned ■ Not concerned at all

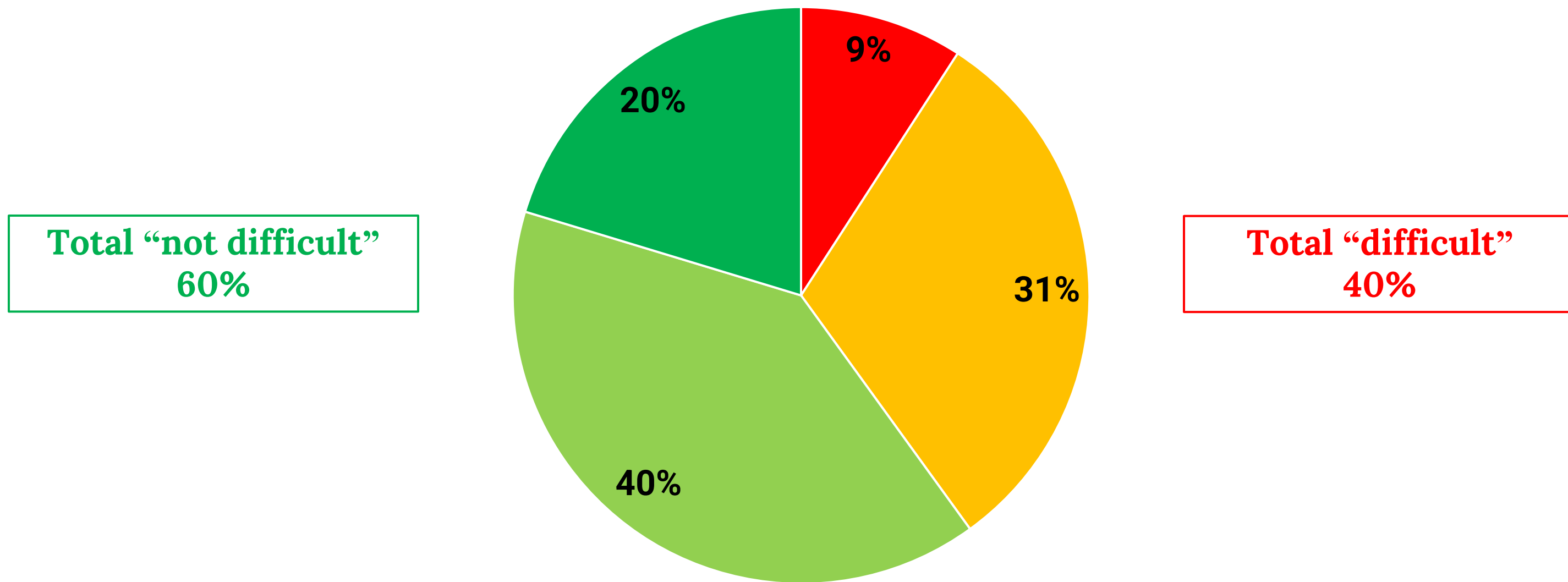


Given the current military conflict involving Iran, how concerned are you about a significant increase in your household gas and energy bills?

Country	Very concerned	Somewhat concerned	Not very concerned	Not concerned at all	Concerned	Not concerned
Spain	54%	36%	7%	3%	90%	10%
Italy	49%	41%	7%	3%	90%	10%
Poland	38%	50%	12%	0%	88%	12%
Belgium	40%	44%	13%	3%	84%	16%
France	31%	43%	22%	4%	74%	26%
Germany	36%	36%	24%	4%	72%	28%
Total	41%	40%	16%	3%	81%	19%

Thinking about your own life, how difficult is it for you right now to afford the basic costs associated with your daily life?

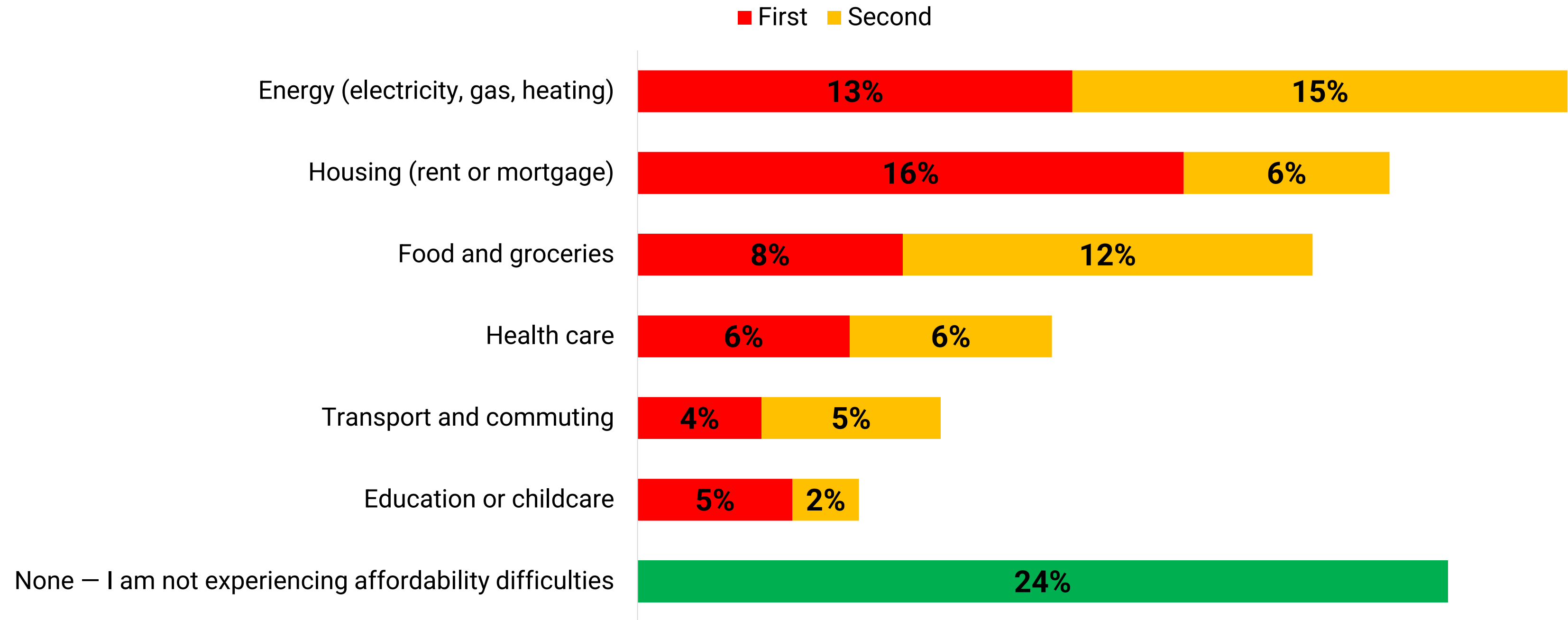
■ Very difficult ■ Somewhat difficult ■ Not very difficult ■ Not difficult at all



Thinking about your own life, how difficult is it for you right now to afford the basic costs associated with your daily life?

Country	Very difficult	Somewhat difficult	Not very difficult	Not difficult at all	Difficult	Not difficult
France	10%	38%	38%	14%	48%	52%
Italy	11%	35%	35%	19%	46%	54%
Poland	10%	34%	43%	13%	44%	56%
Belgium	10%	33%	38%	19%	43%	57%
Germany	7%	25%	41%	27%	32%	68%
Spain	8%	24%	43%	25%	32%	68%
Total	9%	31%	40%	20%	40%	60%

Which of the following areas, if any, are the most difficult for you to afford right now?



Which of the following areas, if any, are the most difficult for you to afford right now?

Energy (electricity, gas, heating)

Country	First	Second	Total
Poland	16%	24%	40%
France	19%	20%	39%
Belgium	15%	15%	30%
Italy	11%	11%	22%
Germany	8%	12%	20%
Spain	9%	11%	20%
Total	13%	15%	28%

Housing (rent or mortgage)

Country	First	Second	Total
Poland	23%	11%	34%
France	22%	7%	29%
Spain	16%	4%	20%
Belgium	14%	5%	19%
Germany	14%	4%	18%
Italy	9%	7%	16%
Total	16%	6%	22%

Which of the following areas, if any, are the most difficult for you to afford right now?

Food and groceries

Country	First	Second	Total
France	10%	19%	29%
Spain	10%	12%	22%
Belgium	7%	11%	18%
Italy	6%	11%	17%
Poland	7%	9%	16%
Germany	7%	9%	16%
Total	8%	12%	20%

Health care

Country	First	Second	Total
France	8%	8%	16%
Italy	10%	5%	15%
Belgium	5%	7%	12%
Poland	6%	6%	12%
Germany	4%	5%	9%
Spain	4%	5%	9%
Total	6%	6%	12%

Which of the following areas, if any, are the most difficult for you to afford right now?

Transport and commuting

Country	First	Second	Total
France	4%	7%	11%
Italy	5%	5%	10%
Poland	5%	5%	10%
Spain	3%	6%	9%
Belgium	2%	6%	8%
Germany	3%	4%	7%
Total	4%	5%	9%

Education or childcare

Country	First	Second	Total
Spain	7%	4%	11%
Italy	7%	3%	10%
Poland	5%	3%	8%
France	5%	1%	6%
Belgium	5%	1%	6%
Germany	1%	0%	1%
Total	5%	2%	7%

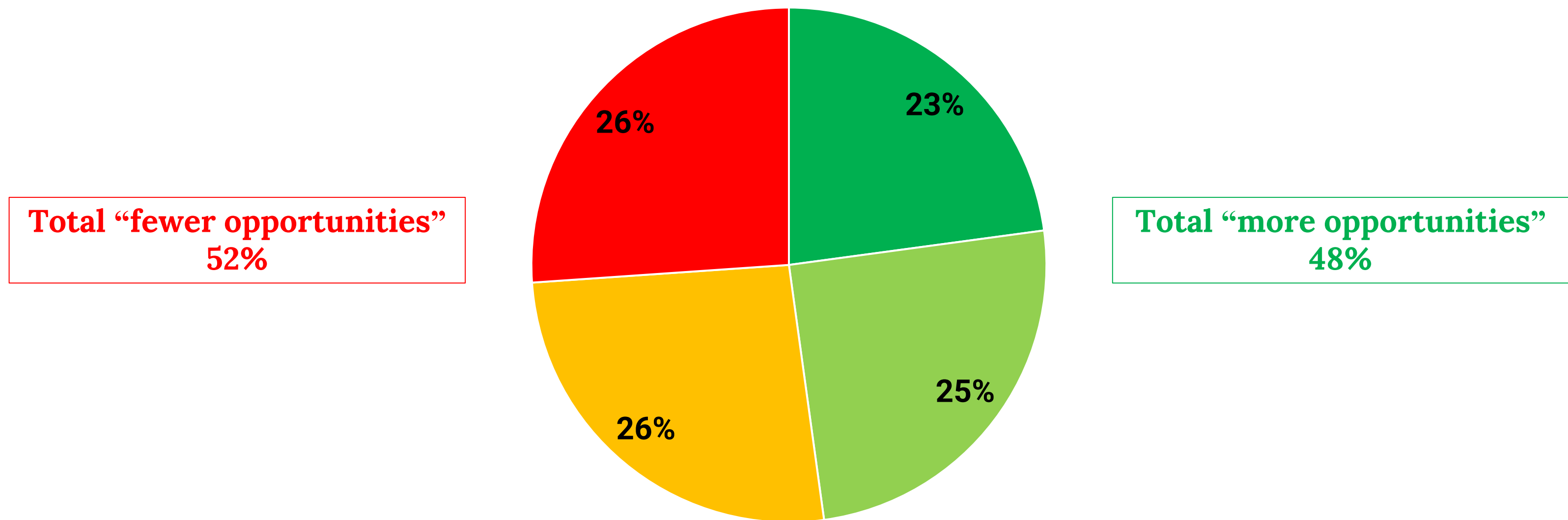
Which of the following areas, if any, are the most difficult for you to afford right now?

None — I am not experiencing affordability difficulties

Country	Total
Germany	33%
Belgium	30%
France	22%
Spain	21%
Italy	19%
Poland	18%
Total	24%

Compared to your parents' generation, do you believe your generation has more economic opportunities or fewer economic opportunities?

■ Many more opportunities ■ Somewhat more opportunities ■ Somewhat fewer opportunities ■ Far fewer opportunities

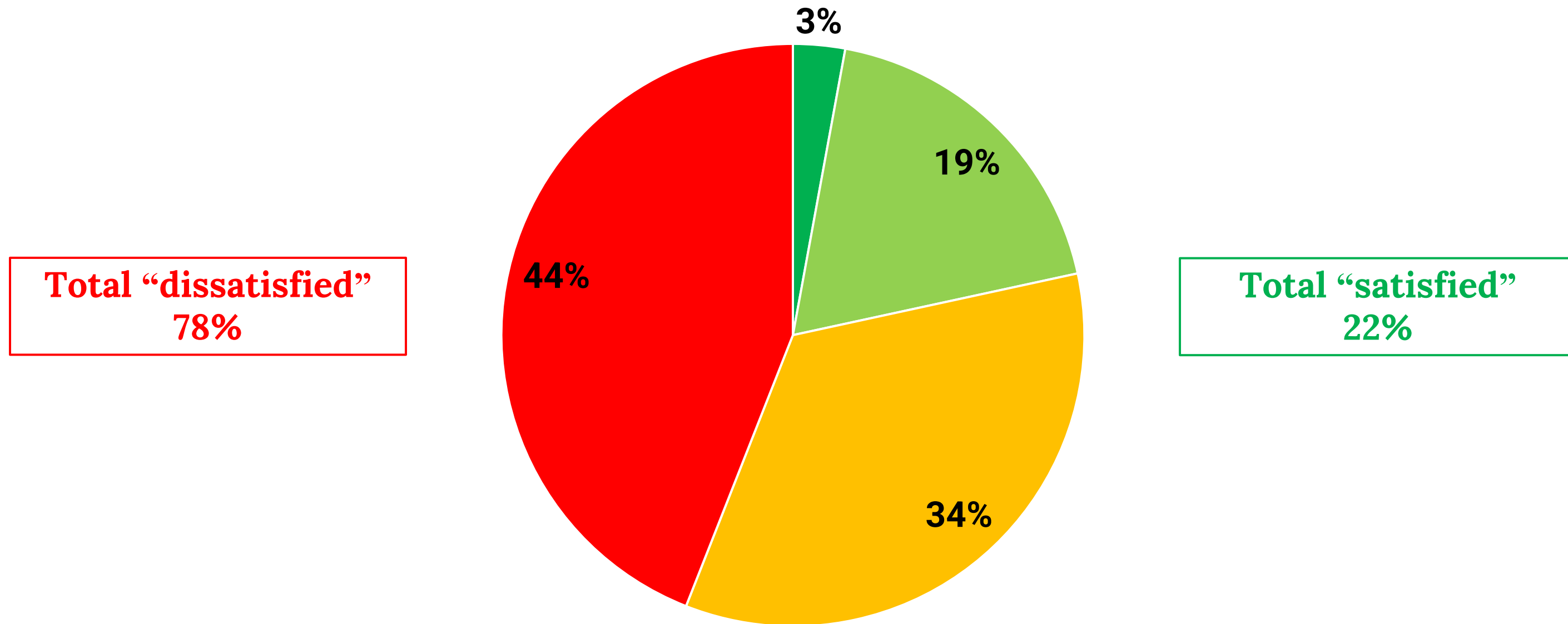


Compared to your parents' generation, do you believe your generation has more economic opportunities or fewer economic opportunities?

Country	Many more opportunities	Somewhat more opportunities	Somewhat fewer opportunities	Far fewer opportunities	More opportunities	Fewer opportunities
Poland	46%	42%	8%	4%	88%	12%
Spain	28%	23%	22%	27%	51%	49%
Germany	27%	23%	28%	22%	50%	50%
Belgium	16%	26%	32%	26%	42%	58%
Italy	16%	18%	31%	35%	34%	66%
France	8%	24%	34%	34%	32%	68%
Total	23%	25%	26%	26%	48%	52%

How satisfied are you with what your national government is doing to address the cost of living?

■ Very satisfied ■ Fairly satisfied ■ Fairly dissatisfied ■ Very dissatisfied



How satisfied are you with what your national government is doing to address the cost of living?

Country	Very satisfied	Fairly satisfied	Fairly dissatisfied	Very dissatisfied	Satisfied	Dissatisfied
Poland	8%	31%	37%	24%	39%	61%
Belgium	3%	29%	41%	27%	32%	68%
Spain	3%	21%	31%	45%	24%	76%
Italy	3%	16%	24%	57%	19%	81%
Germany	2%	16%	42%	40%	18%	82%
France	1%	14%	33%	52%	15%	85%
Total	3%	19%	34%	44%	22%	78%

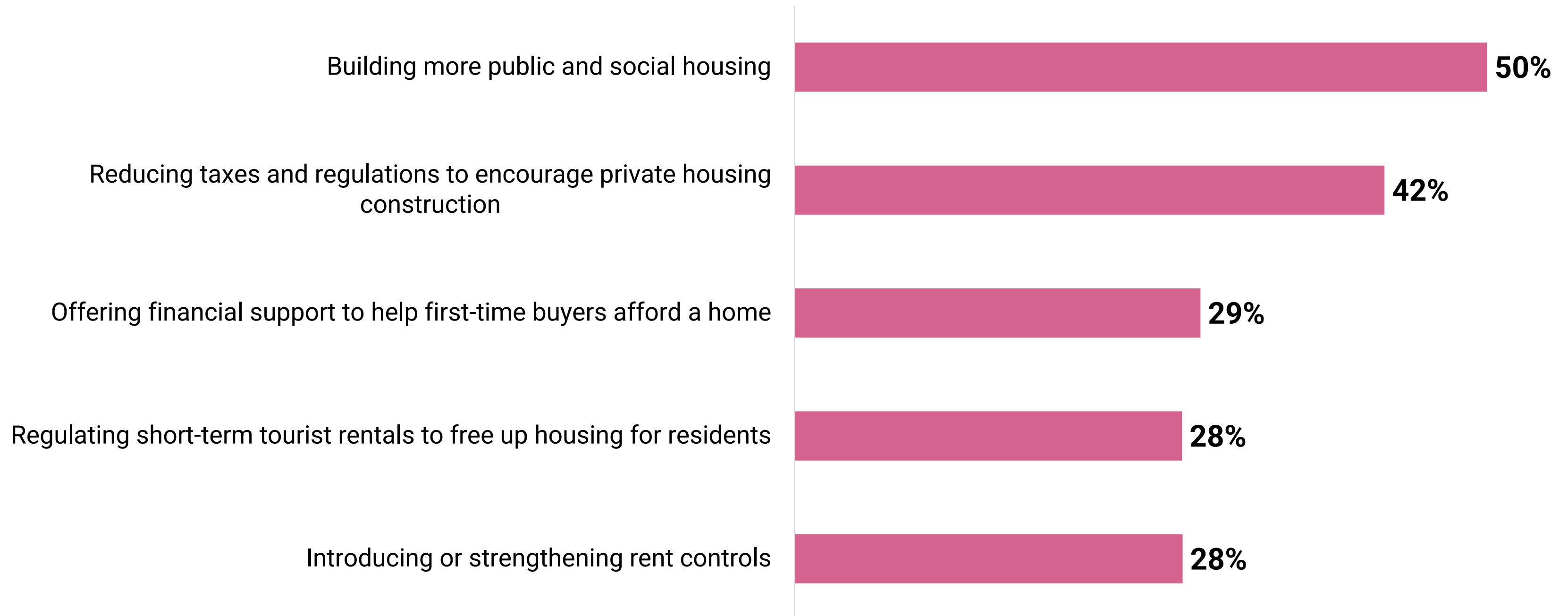
Which of the following statements comes closest to your view on immigration to your country?



Which of the following statements comes closest to your view on immigration to your country?

Country	Immigration brings both benefits and challenges, and current levels are about right	Immigration is creating more challenges than benefits, and levels should be reduced	Immigration is a serious problem and should be drastically reduced	Immigration is mostly positive for our economy and society and should be encouraged
Poland	52%	21%	22%	5%
Spain	42%	24%	16%	18%
Italy	38%	21%	18%	23%
Germany	36%	23%	23%	18%
France	33%	24%	31%	12%
Belgium	28%	32%	31%	9%
Total	38%	23%	23%	16%

Thinking about the cost and availability of housing in your country, which of the following measures should your government prioritize? (Choose up to two options)



Thinking about the cost and availability of housing in your country, which of the following measures should your government prioritize? (Choose up to two options)

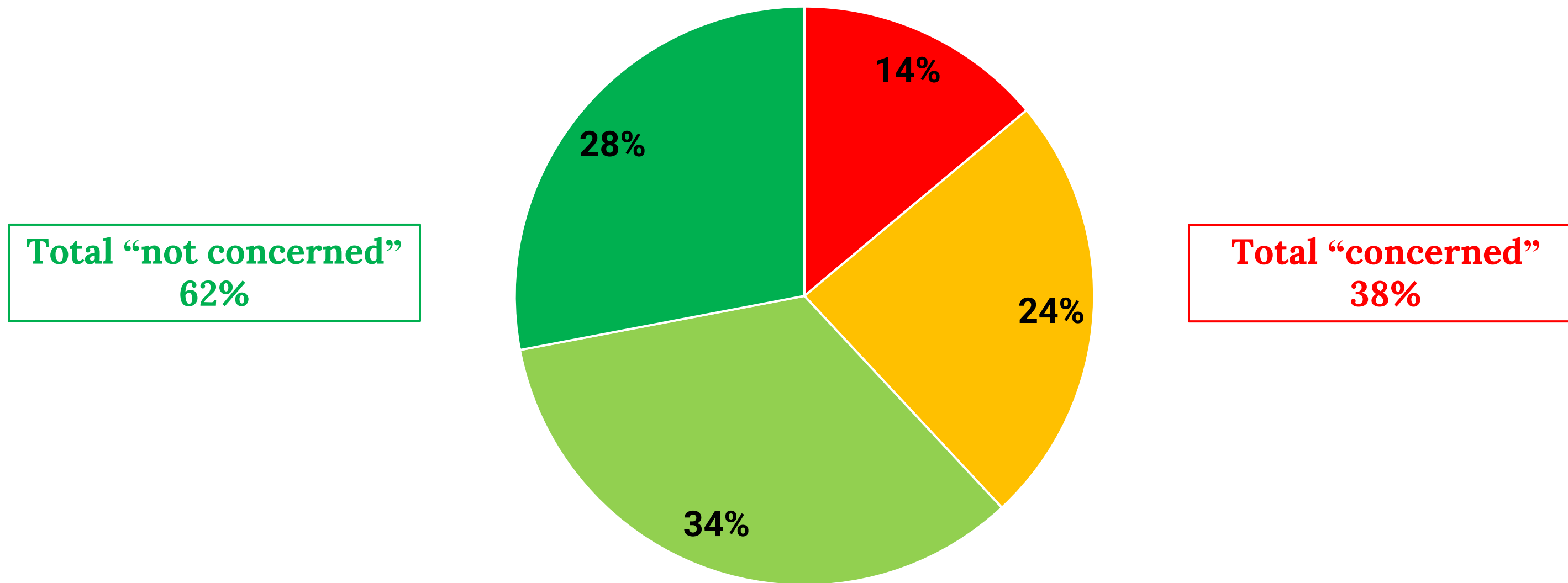
Country	Building more public and social housing	Reducing taxes and regulations to encourage private housing construction	Offering financial support to help first-time buyers afford a home	Introducing or strengthening rent controls	Regulating short-term tourist rentals to free up housing for residents
Spain	67%	43%	27%	22%	25%
Germany	55%	60%	23%	22%	23%
Poland	51%	38%	35%	31%	16%
Italy	49%	27%	40%	30%	28%
France	35%	37%	27%	34%	45%
Belgium	31%	41%	23%	29%	16%
Total	50%	42%	29%	28%	28%

Cluster17

**TECHNOLOGY & INNOVATION:
AI, SOCIAL MEDIA, DATA TRUST &
DIGITAL SOVEREIGNTY**

How concerned are you that artificial intelligence could significantly change or replace your job within the next ten years?

■ Very concerned ■ Somewhat concerned ■ Not very concerned ■ Not concerned at all

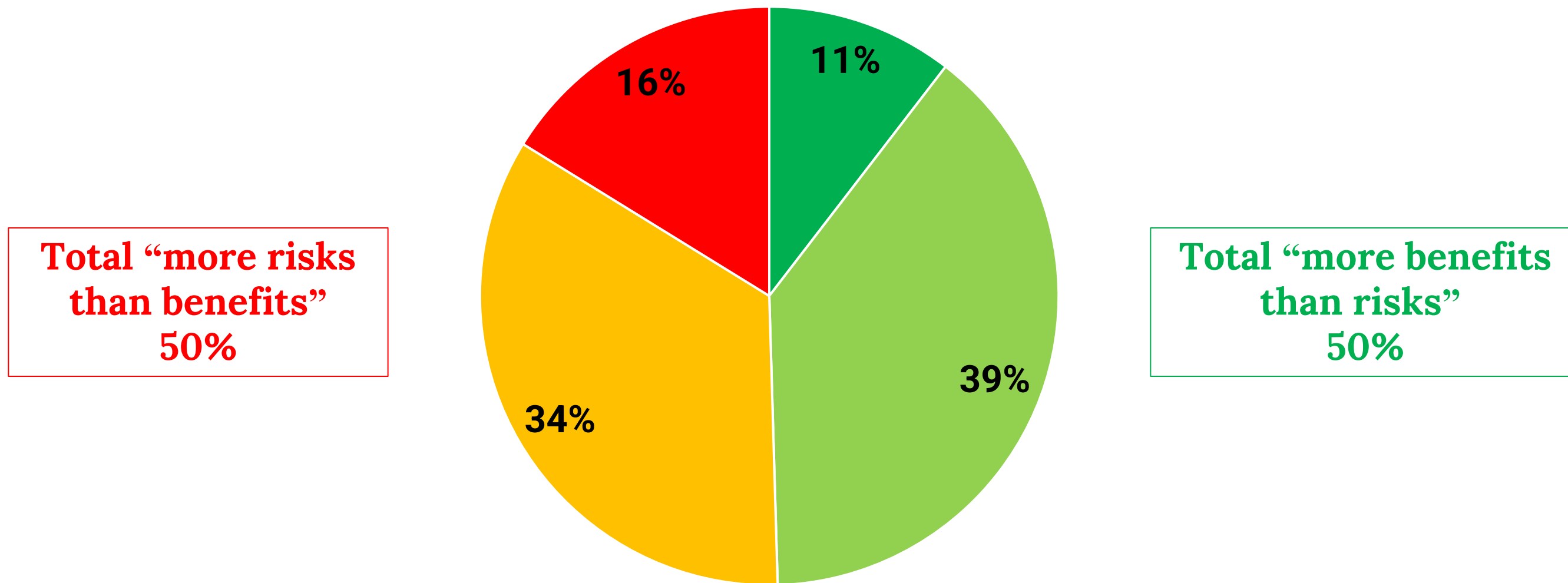


How concerned are you that artificial intelligence could significantly change or replace your job within the next ten years?

Country	Very concerned	Somewhat concerned	Not very concerned	Not concerned at all	Concerned	Not very concerned / Not concerned
France	22%	29%	25%	24%	51%	49%
Poland	12%	31%	31%	26%	43%	57%
Italy	18%	25%	38%	19%	43%	57%
Belgium	18%	22%	29%	31%	40%	60%
Spain	8%	21%	37%	34%	29%	71%
Germany	9%	19%	38%	34%	28%	72%
Total	14%	24%	34%	28%	38%	62%

Overall, do you believe that artificial intelligence will bring more benefits or more risks to society?

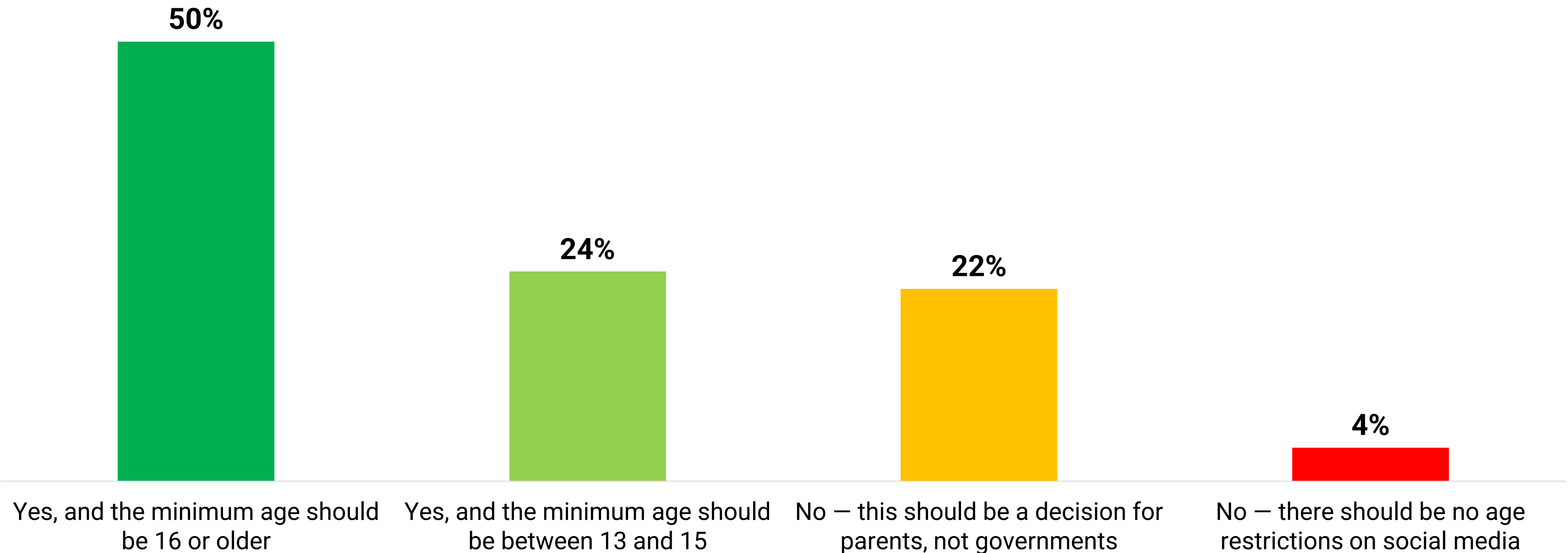
- Far more benefits than risks
- Somewhat more benefits than risks
- Somewhat more risks than benefits
- Far more risks than benefits



Overall, do you believe that artificial intelligence will bring more benefits or more risks to society?

Country	Far more benefits than risks	Somewhat more benefits than risks	Somewhat more risks than benefits	Far more risks than benefits	More benefits than risks	More risks than benefits
Spain	18%	45%	25%	12%	63%	37%
Poland	6%	47%	34%	13%	53%	47%
Germany	13%	40%	32%	15%	53%	47%
Italy	12%	36%	34%	18%	48%	52%
Belgium	5%	37%	40%	18%	42%	58%
France	4%	32%	44%	20%	36%	64%
Total	11%	39%	34%	16%	50%	50%

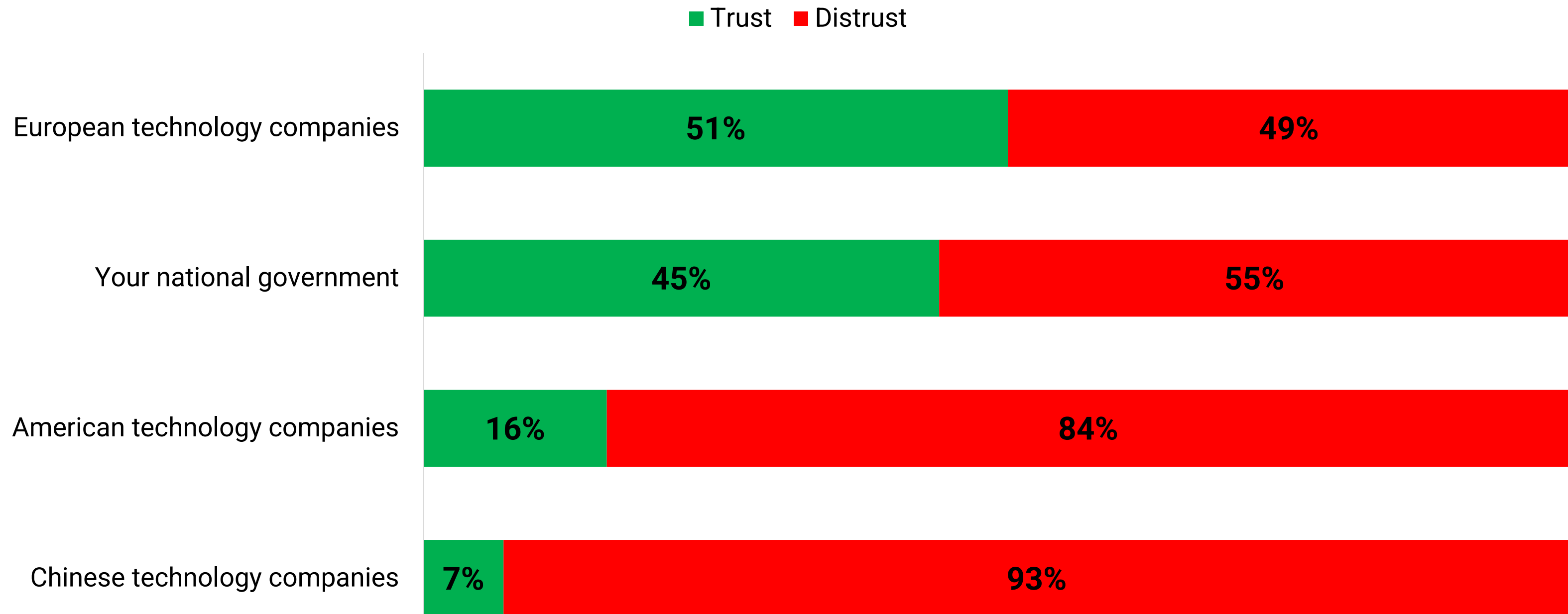
Should governments set a minimum age at which children are allowed to create their own social media accounts?



Should governments set a minimum age at which children are allowed to create their own social media accounts?

Country	Yes, and the minimum age should be 16 or older	Yes, and the minimum age should be between 13 and 15	No — this should be a decision for parents, not governments	No — there should be no age restrictions on social media	Yes	No
Italy	64%	20%	14%	2%	84%	16%
Poland	53%	30%	16%	1%	83%	17%
Belgium	54%	22%	19%	5%	76%	24%
Germany	39%	31%	23%	7%	70%	30%
Spain	55%	15%	26%	4%	70%	30%
France	48%	21%	28%	3%	69%	31%
Total	50%	24%	22%	4%	74%	26%

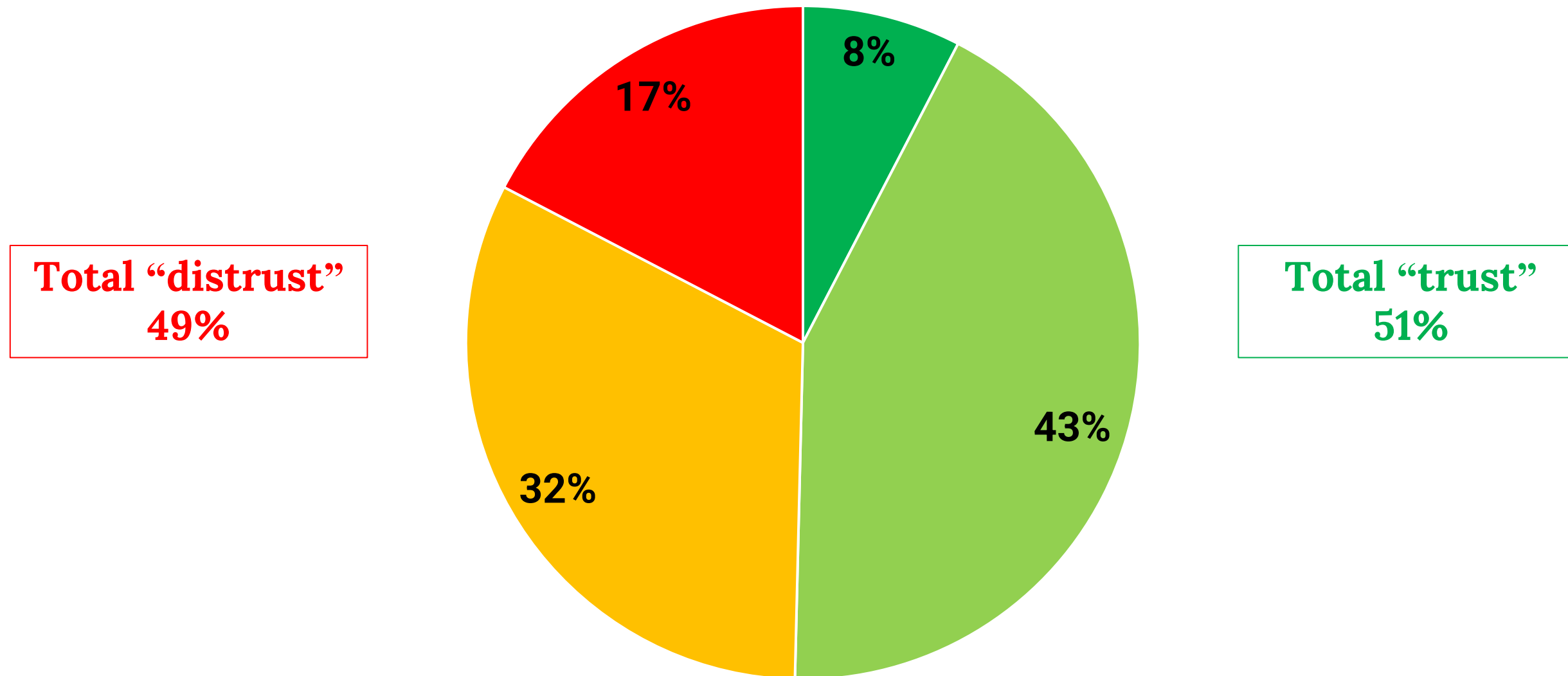
How much do you trust each of the following to handle your personal data responsibly?



How much do you trust each of the following to handle your personal data responsibly?

European technology companies

■ Trust a lot ■ Trust somewhat ■ Distrust somewhat ■ Distrust a lot



How much do you trust each of the following to handle your personal data responsibly?

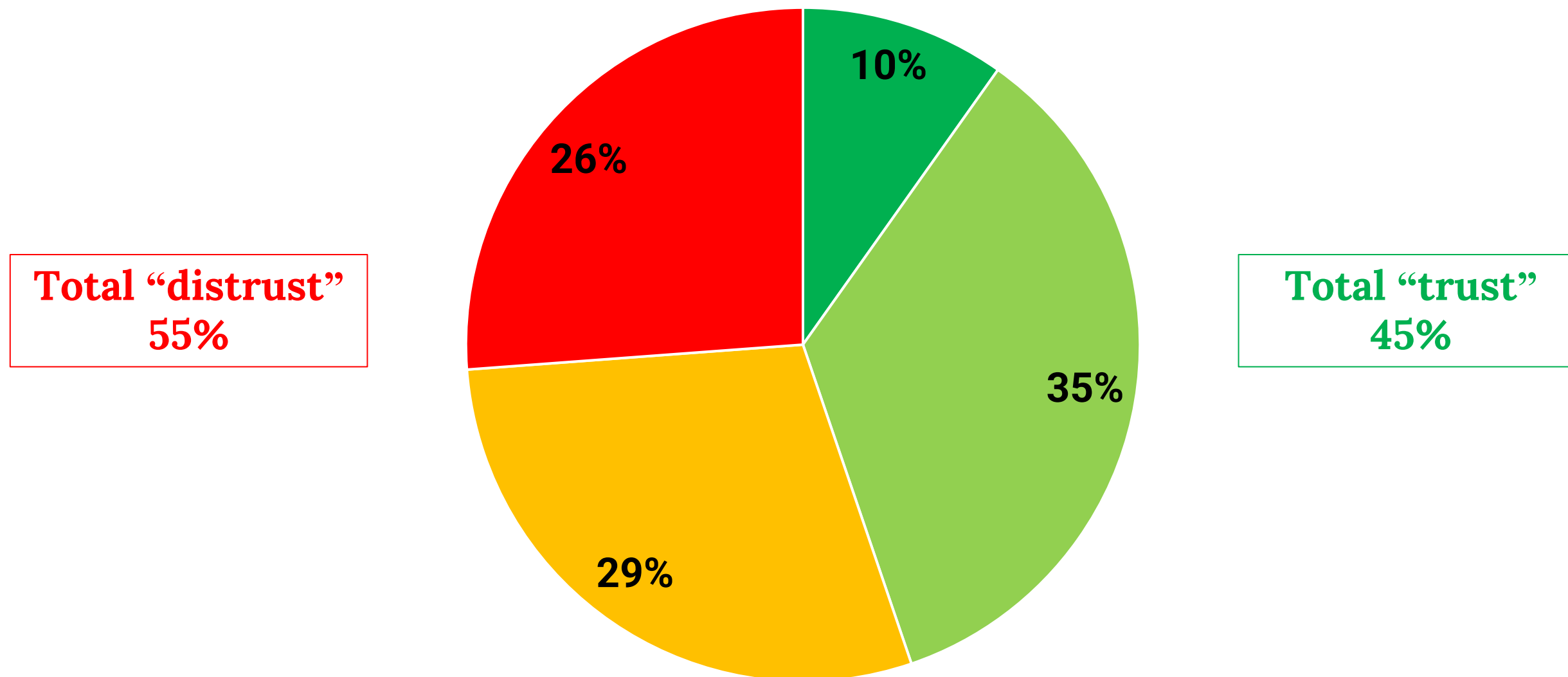
European technology companies

Country	Trust a lot	Trust somewhat	Distrust somewhat	Distrust a lot	Trust	Distrust
Belgium	7%	52%	29%	12%	59%	41%
Poland	13%	45%	25%	17%	58%	42%
Germany	8%	47%	34%	11%	55%	45%
Italy	8%	43%	32%	17%	51%	49%
France	5%	39%	32%	24%	44%	56%
Spain	7%	36%	36%	21%	43%	57%
Total	8%	43%	32%	17%	51%	49%

How much do you trust each of the following to handle your personal data responsibly?

Your national government

■ Trust a lot ■ Trust somewhat ■ Distrust somewhat ■ Distrust a lot



How much do you trust each of the following to handle your personal data responsibly?

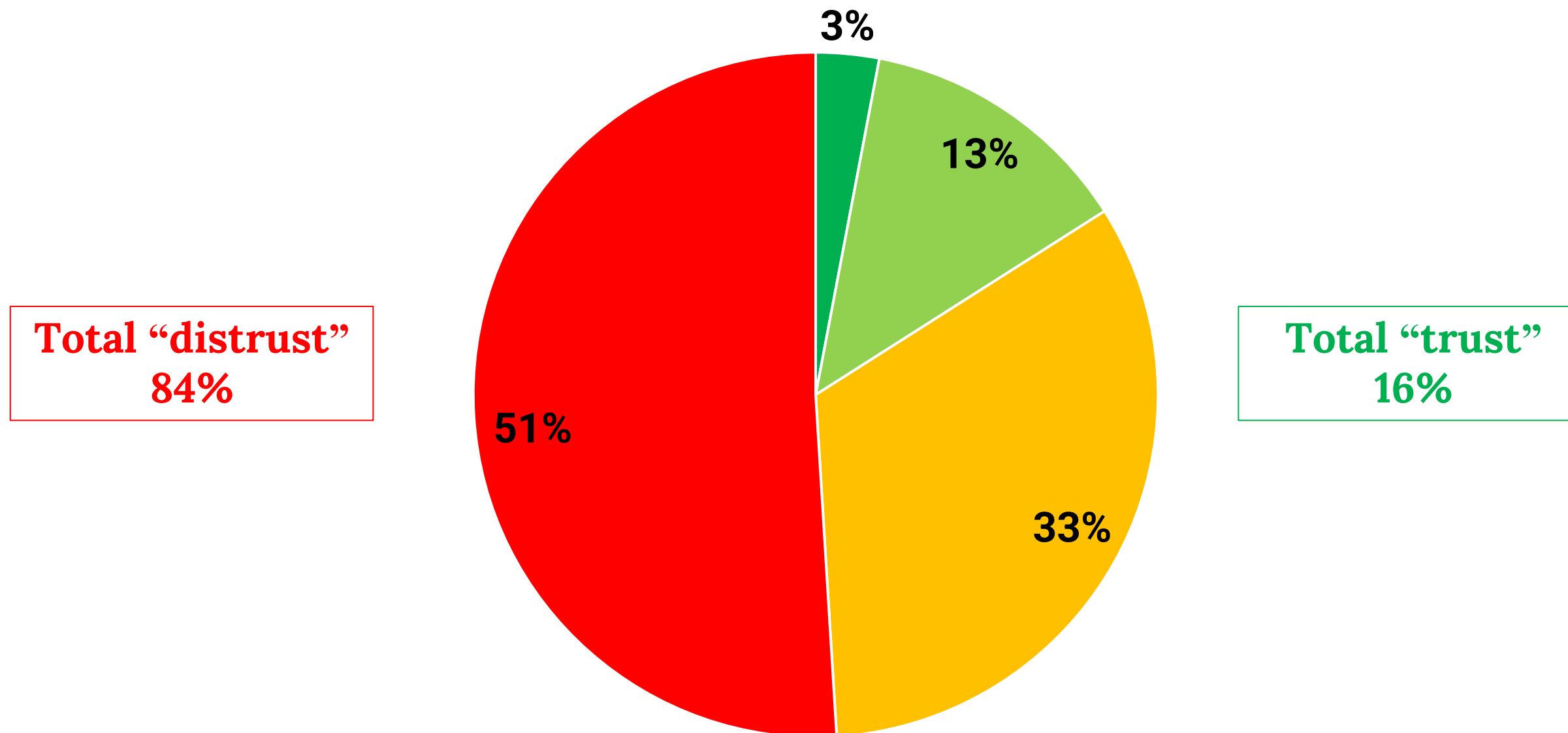
Your national government

Country	Trust a lot	Trust somewhat	Distrust somewhat	Distrust a lot	Trust	Distrust
Belgium	11%	45%	28%	16%	56%	44%
Germany	11%	41%	28%	20%	52%	48%
Poland	15%	34%	28%	23%	49%	51%
France	7%	36%	28%	29%	43%	57%
Italy	7%	31%	36%	26%	38%	62%
Spain	10%	26%	26%	38%	36%	64%
Total	10%	35%	29%	26%	45%	55%

How much do you trust each of the following to handle your personal data responsibly?

American technology companies

■ Trust a lot ■ Trust somewhat ■ Distrust somewhat ■ Distrust a lot



How much do you trust each of the following to handle your personal data responsibly?

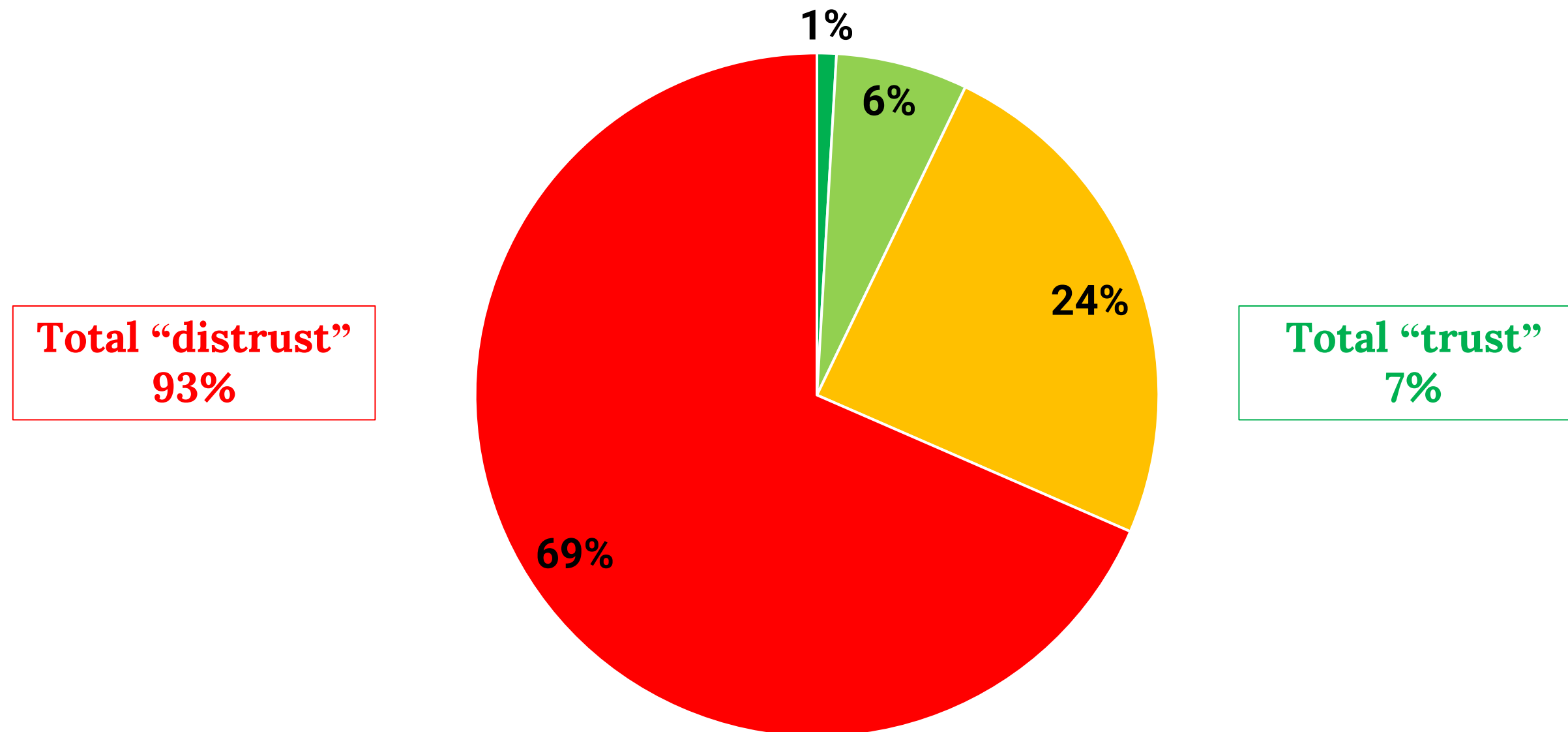
American technology companies

Country	Trust a lot	Trust somewhat	Distrust somewhat	Distrust a lot	Trust	Distrust
Poland	9%	29%	33%	29%	38%	62%
Italy	1%	14%	32%	53%	15%	85%
Spain	3%	11%	29%	57%	14%	86%
Belgium	1%	12%	42%	45%	13%	87%
France	2%	11%	29%	58%	13%	87%
Germany	1%	8%	38%	53%	9%	91%
Total	3%	13%	33%	51%	16%	84%

How much do you trust each of the following to handle your personal data responsibly?

Chinese technology companies

■ Trust a lot ■ Trust somewhat ■ Distrust somewhat ■ Distrust a lot



How much do you trust each of the following to handle your personal data responsibly?

Chinese technology companies

Country	Trust a lot	Trust somewhat	Distrust somewhat	Distrust a lot	Trust	Distrust
Poland	3%	17%	32%	48%	20%	80%
Italy	1%	7%	31%	61%	8%	92%
Belgium	0%	7%	25%	68%	7%	93%
Spain	1%	5%	26%	68%	6%	94%
France	1%	5%	17%	77%	6%	94%
Germany	0%	2%	21%	77%	2%	98%
Total	1%	6%	24%	69%	7%	93%

OUR DNA: SCIENTIFIC RIGOR

Cluster17's identity is rooted in **scientific rigor**. Founded by academics and opinion research specialists, we are committed to producing **high-quality data**. Cluster17 is the result of several years of research and development, leading to the creation of a **high-performing poll tool** and an **innovative analytical method** tested on tens of thousands of respondents across the entire country. This approach is based on a unique segmentation of French society into 16 homogeneous groups: the Clusters.



Building on this work, Cluster17 has ranked among the top-performing polling firms in every election since its creation in 2022.



[Click here to review our performance](#)



OUR 7 COMMITMENTS

- 1 Cluster17 is committed to applying the standards and methodologies of market and opinion research. It complies with the ethical guidelines governing polling organizations and protects the rights of its panelists.
- 2 Cluster17 is committed to complying with applicable data protection laws. It has appointed a DPO (Data Protection Officer) and implemented a PIA (Privacy Impact Assessment) to ensure full compliance with the General Data Protection Regulation (GDPR). For more information on our data protection policy:
<https://cluster17.com/politique-de-protection-des-donnees/>
- 3 Unless otherwise specified by contractual agreement, the retention period for personal data collected in surveys is 36 months for recurring studies and 24 months for ad hoc studies.
- 4 Cluster17 follows strict quality control procedures at every stage of a study:

 - The questionnaire is drafted in accordance with professional standards and guidelines. It is reviewed by the Head of Research and then submitted to the client for final validation.
 - The questionnaire programming is tested by at least three different individuals before launch.
- 5 Cluster17 applies strict rules for selecting its panelists and conducting random sampling to build survey samples: contact rate, response rate, random selection, etc.
- 6 Cluster17 monitors fieldwork and data collection rigorously (unique links, participation rate, response duration, respondent behavior, IP address checks, panelist behavior tracking, response consistency, etc.).
- 7 Cluster17 analyzes results using established statistical methods. Raw data are systematically checked, and their consistency is verified. Weighted results are systematically reviewed by at least two qualified individuals, including a senior quantitative expert.

Cluster 17

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