

Europe's 'S.I.N.S.' and the Rise of the Right

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Security

Immigration

No growth

Social spending



Security

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Views on defence spending

“Which of these comes closest to your view about what the government should do on defence spending?”

View	France	Germany	United Kingdom
Increase , even if higher taxes or cuts in other areas	34%	47%	46%
Maintain	39%	33%	33%
Reduce , even if reduces military readiness	27%	20%	21%

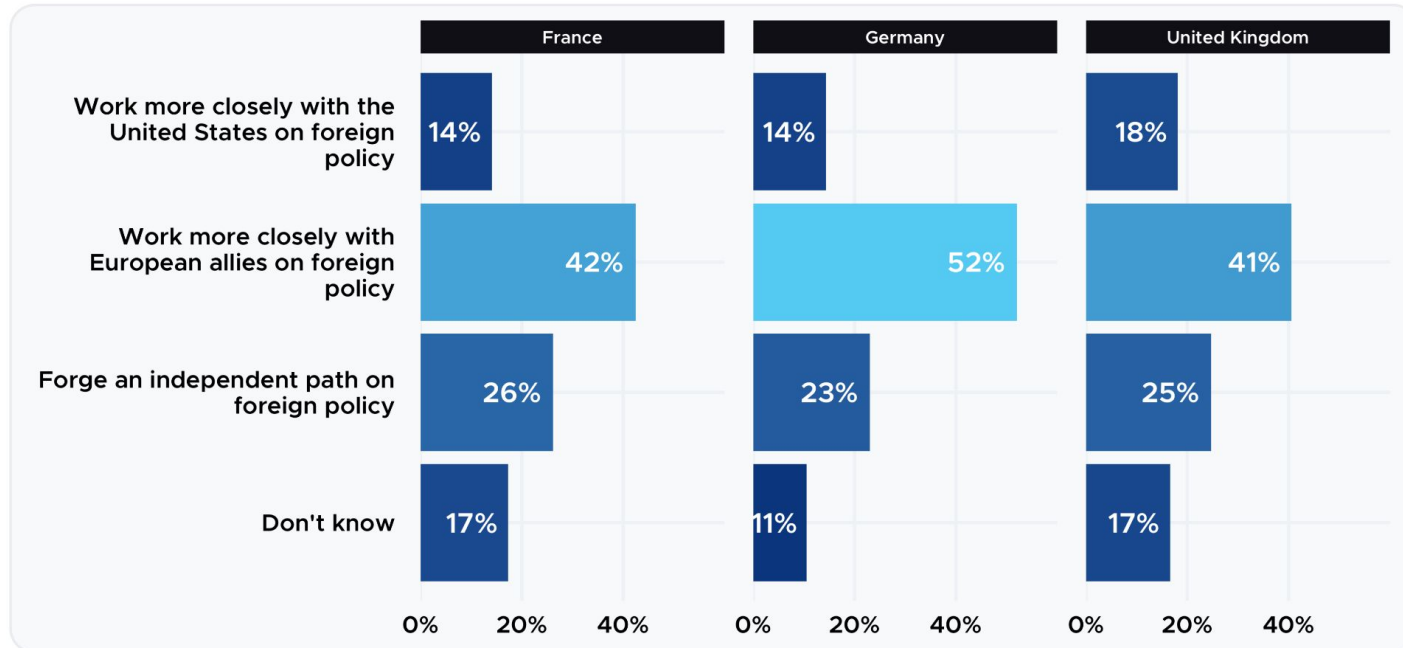


Independence or collaboration?



Voters want closer foreign policy ties with Europe

'WHAT DIRECTION SHOULD YOUR GOVERNMENT TAKE ON FOREIGN POLICY?'



Results from Focaldata polling, 26-28 February 2025





Views on NATO

In a referendum, would you vote to remain a member of NATO or leave NATO? (excl. undecideds)

United Kingdom	Remain 84%	Leave 16%
Germany	Remain 81%	Leave 19%
France	Remain 70%	Leave 30%

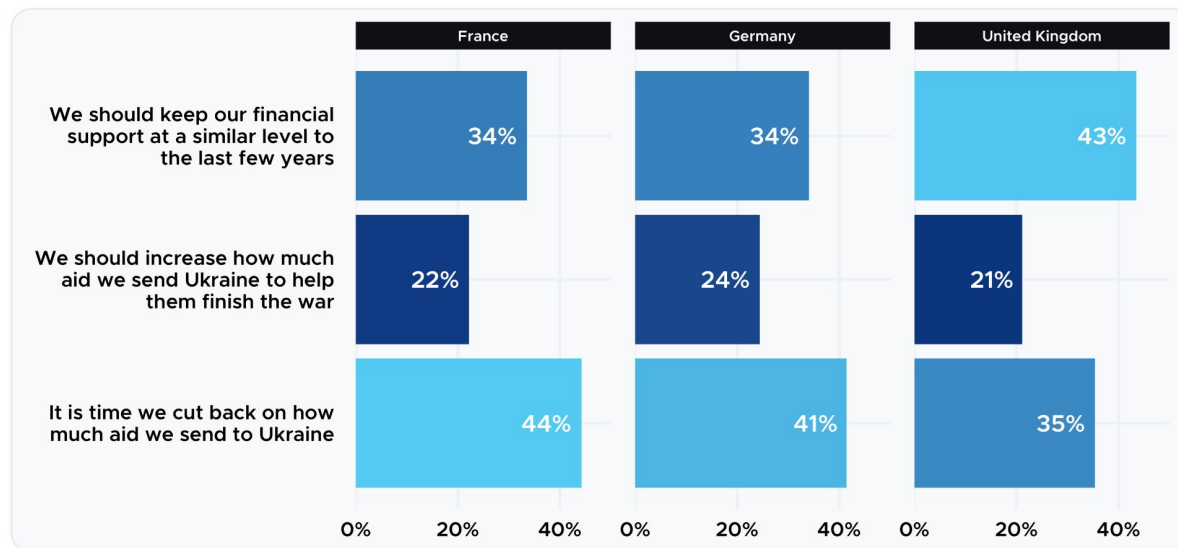
Views on Ukraine funding

A plurality of voters in the UK want to maintain Ukraine funding, but French and German voters lean towards cuts.



Brits lean towards maintaining Ukraine aid

'WHICH OF THE FOLLOWING COMES CLOSEST TO YOUR VIEW'



Results from Focaldata polling, 26-28 February 2025



Who are the allies and enemies?




“Where would you place the following countries or groups on a scale between ally of your country and enemy of your country?”

MOST COMMON ALLIES


United Kingdom

-  Australia: 56%
-  Canada: 56%
-  Ireland: 49%

France



-  Germany: 51%
-  Spain: 50%
-  Italy: 49%

Germany


-  France: 56%
-  European Union: 55%
-  NATO: 54%

MOST COMMON ENEMIES/HOSTILE




United Kingdom

-  Russia: 52%
-  North Korea: 45%
-  Iran: 38%

France

-  Russia: 33%
-  North Korea: 31%
-  Iran: 27%


Germany

-  Russia: 44%
-  North Korea: 35%
-  Iran: 28%



Views on China

“Where would you place the following countries or groups on a scale between ally of your country and enemy of your country?”

View of China 	France	Germany	United Kingdom
Ally + friendly	21%	18%	20%
Neutral	44%	38%	34%
Enemy + unfriendly	35%	44%	46%

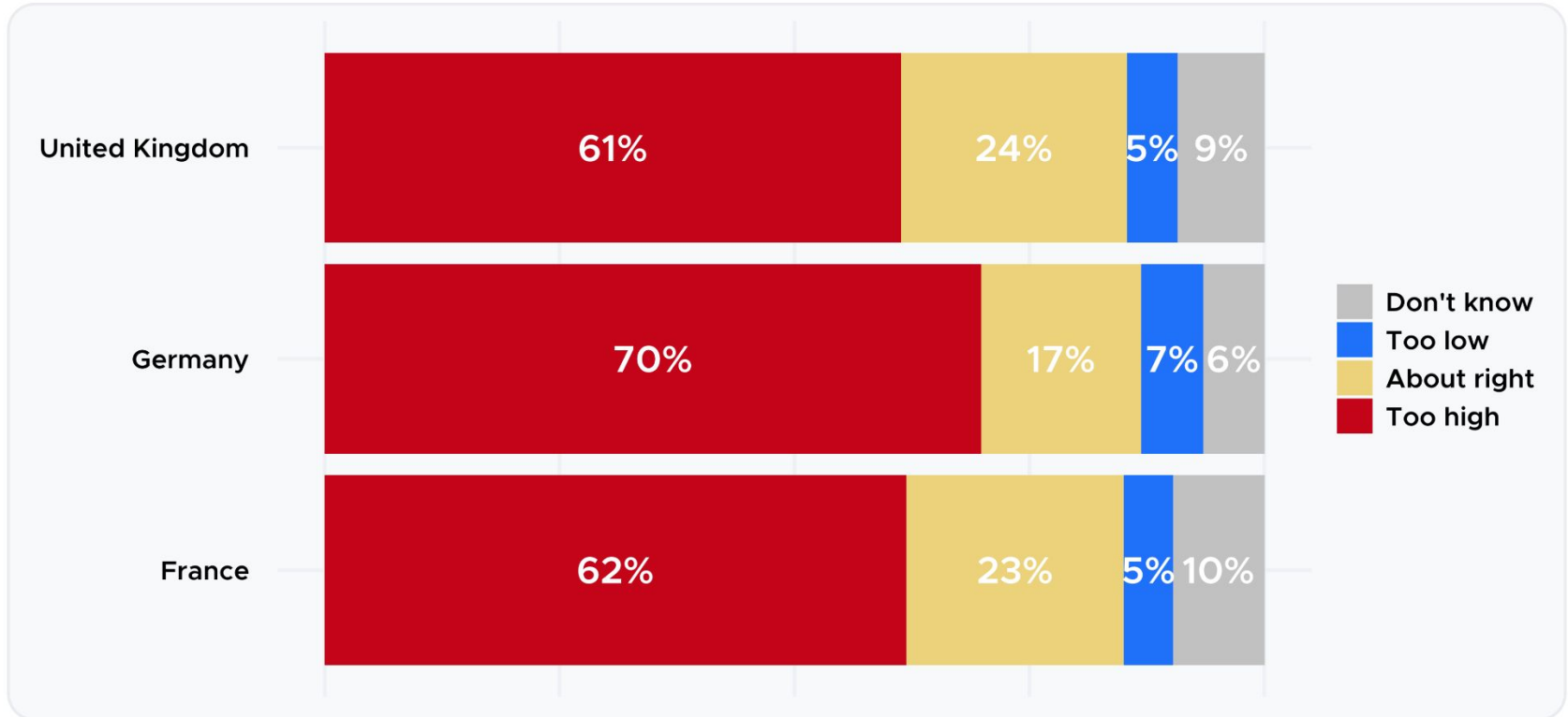


Immigration

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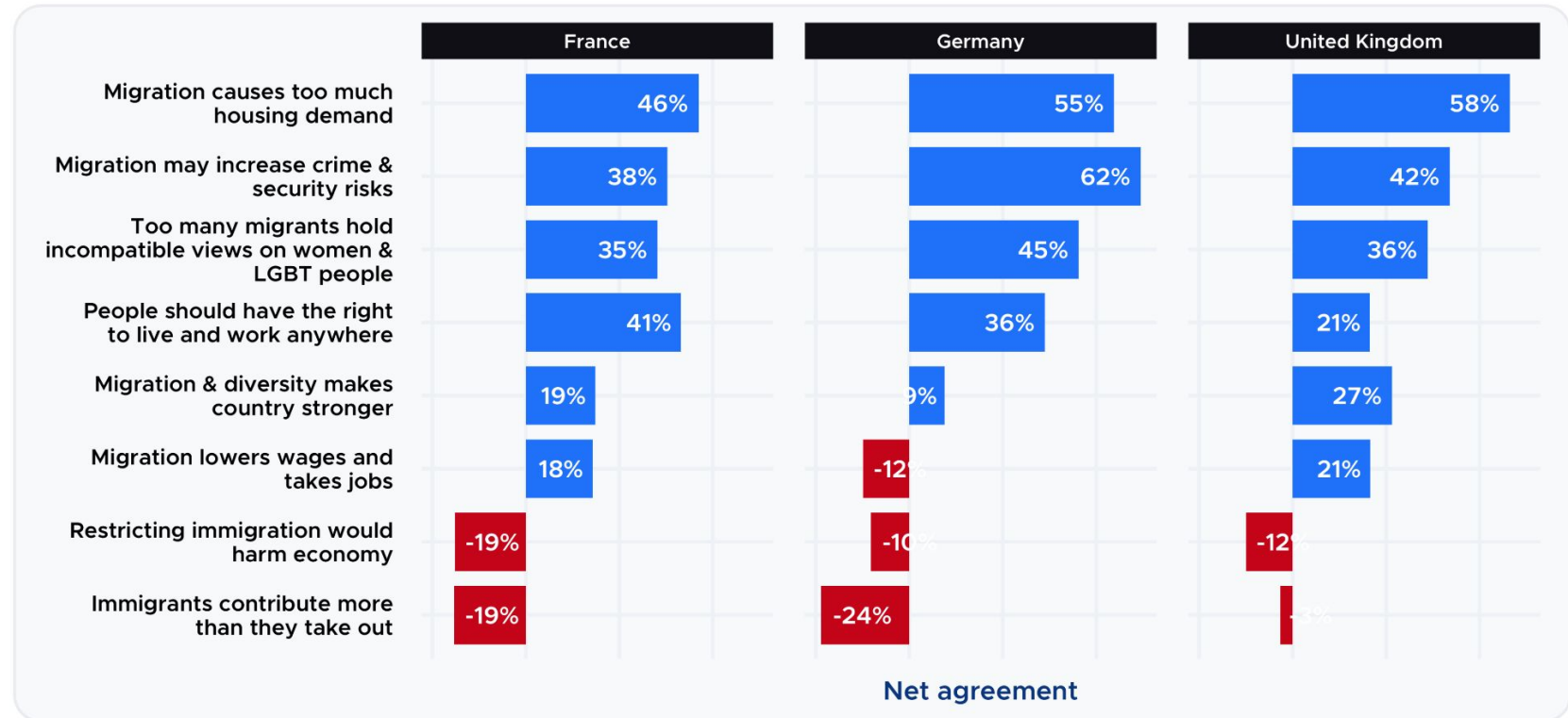
Voters think migration has been too high

'HAS IMMIGRATION TO YOUR COUNTRY IN RECENT YEARS BEEN ...?'



Voters generally agree with migration concerns

NET AGREEMENT WITH POSITIVE AND NEGATIVE MIGRATION STATEMENTS





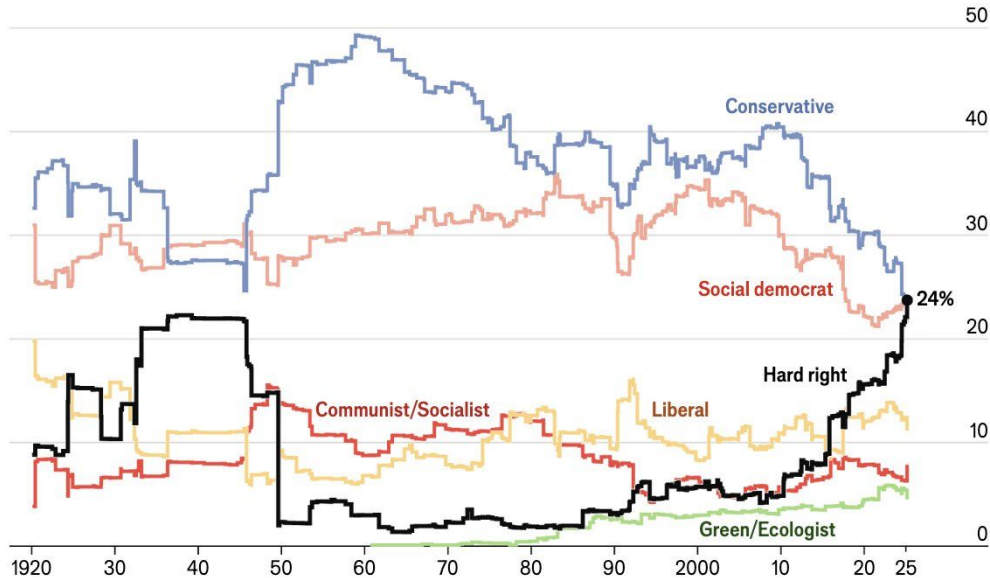
Best party to handle immigration + voting intention

Country	France	Germany	United Kingdom
Share who think immigration is a top issue	28%	46%	35%
Share of all voters who think radical right / far-right is best party to handle immigration	37% (1st)	28% (1st)	26% (1st)
Radical right / far-right vote share among those who select immigration as top issue	60% (1st)	29% (2nd)	48% (1st)

Hard right achieving best election results in history

The hard rise

European democracies*, average vote share† by party type, %

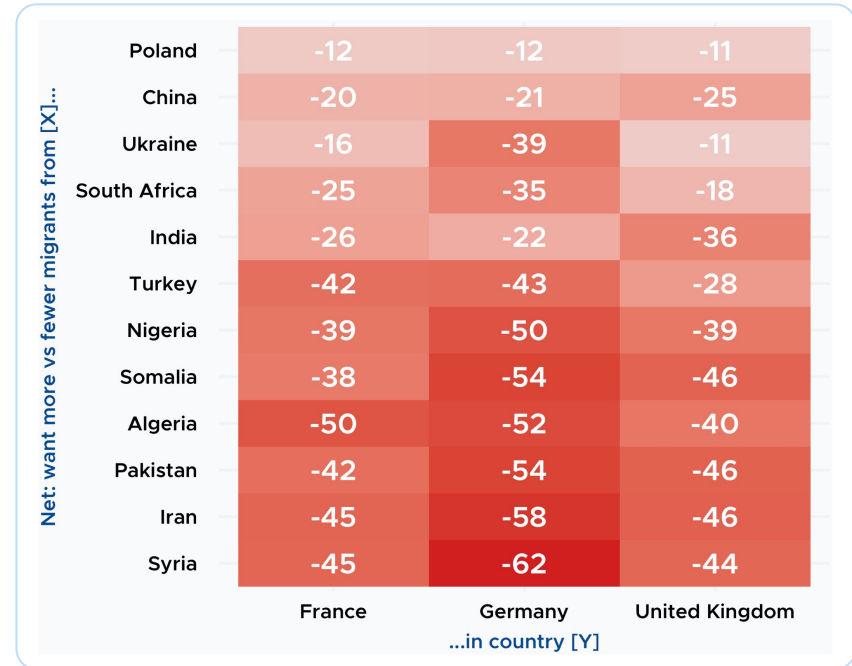
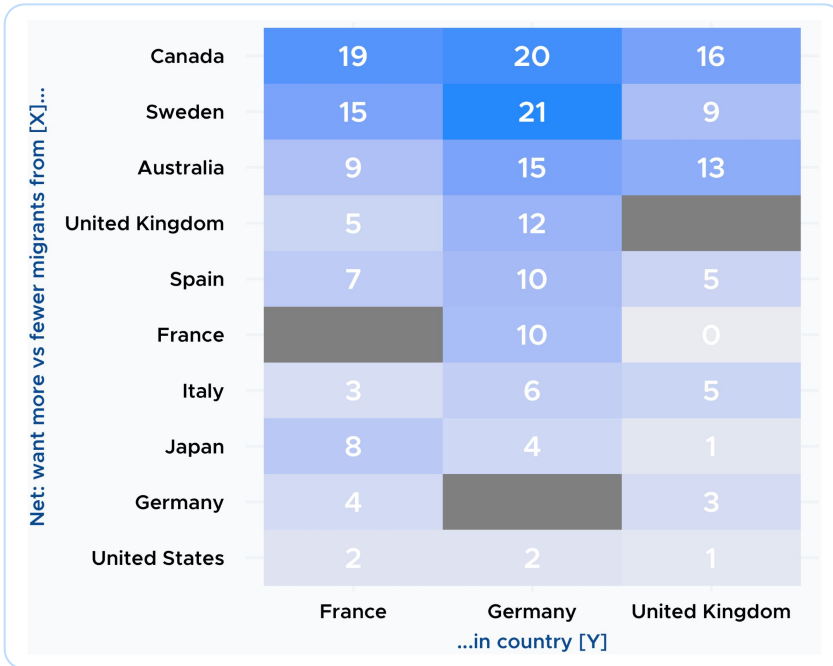


Social democrats, conservatives and hard right party all around **24%** is pretty much exactly where UK polling is right now!

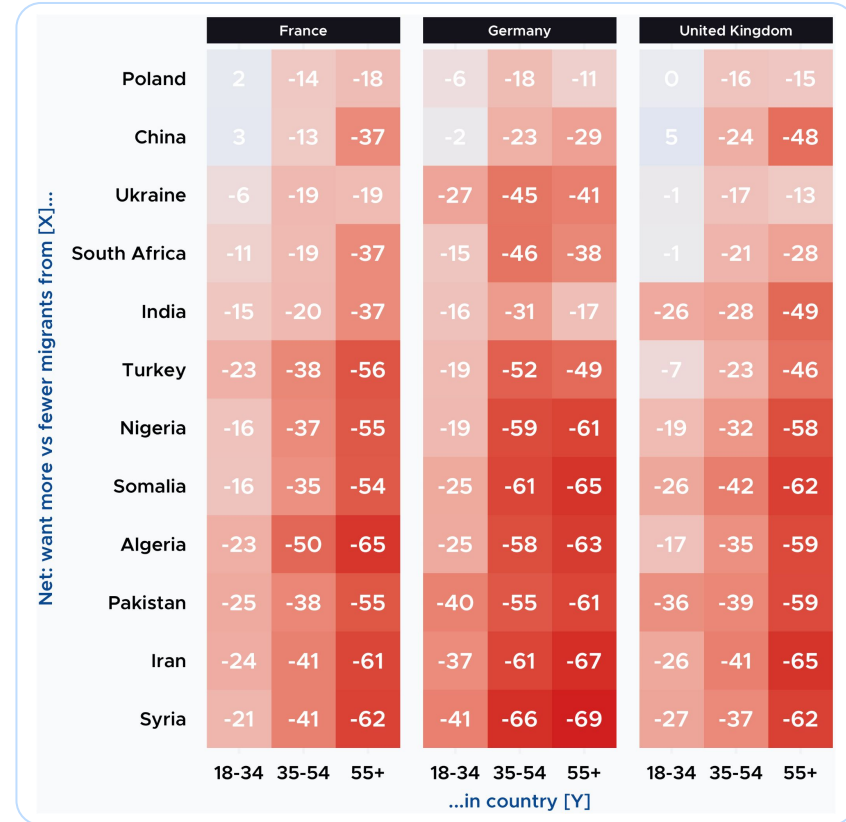
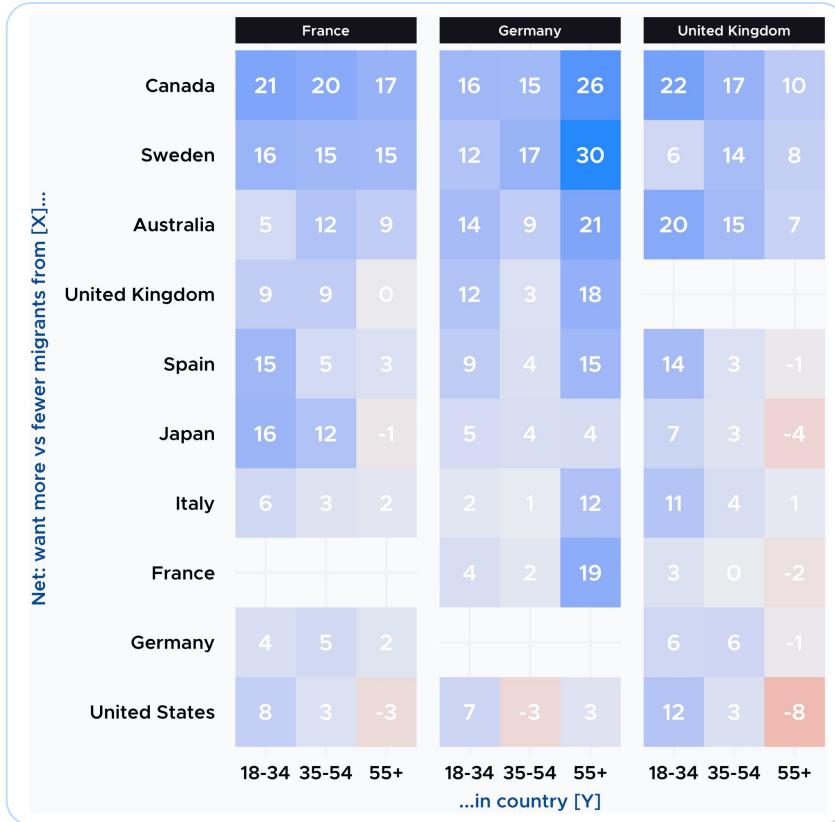
*Including 27 members of the European Union, Britain, Iceland, Norway and Switzerland. Countries are included only for years they are considered to be democracies †Most recent election in all countries, population-weighted Sources: National elections; Our World in Data; ParlGov; The PopuList; *The Economist*

Immigration preference by country

Attitudes to immigration are more complex than too high / too low. Voters in all three countries generally want **more** migrants from high-income countries like Canada, Japan, Spain and Australia.



Immigration preference by age group





No growth

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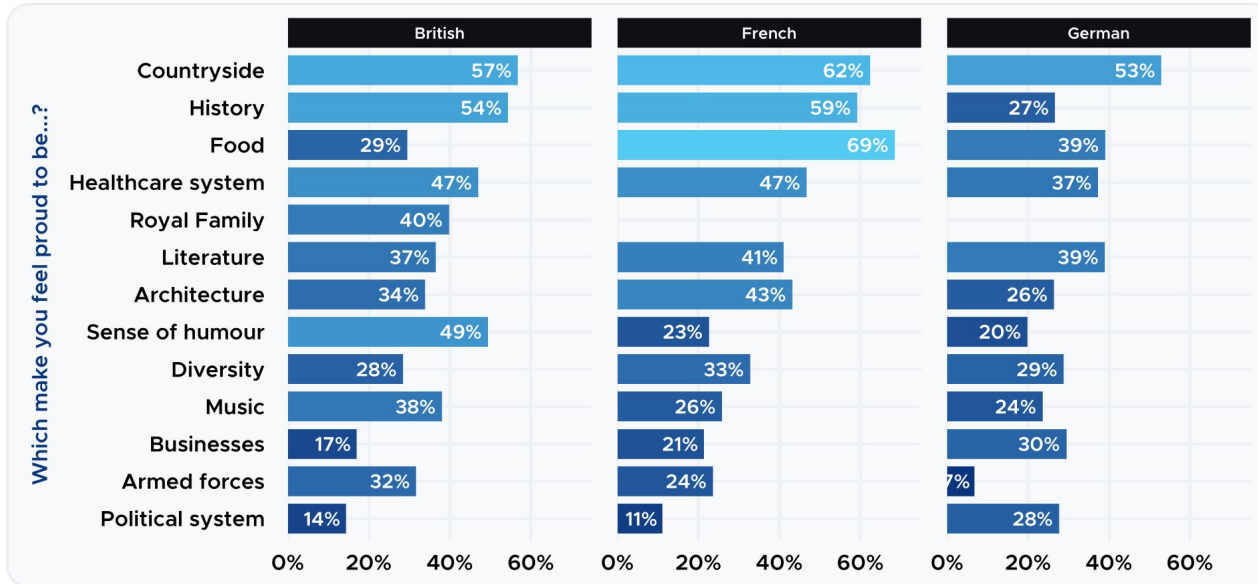
Pride in business

Germans are least proud of their history & armed forces. Brits most proud of music & sense of humour.



Business does not generate much national pride

SHARE SAYING EACH OPTION MAKES THEM FEEL PROUD TO BE...





Pro-growth vs. anti-growth beliefs: **UK** most pro-growth

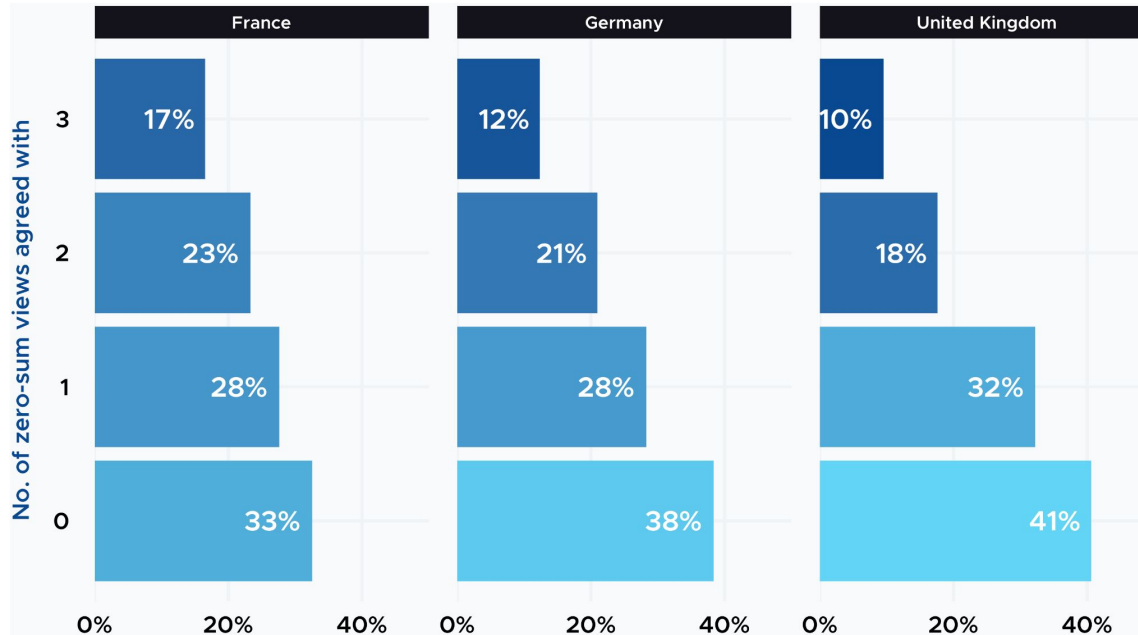
Statement	France	Germany	United Kingdom
“The increasing use of new technologies makes me [optimistic/pessimistic] about the future”	48-52	62-38	58-42
Further economic growth will... “unlock more of humanity's potential and improve people’s quality of life” / “not make people happy or improve the important things in life”	55-45	65-35	70-30
“Constant innovation and progress are key to improving our lives” / “We should focus on making do with less rather than always wanting more”	44-56	52-48	60-40
“Wealth can grow so that there’s enough for everyone” / “People can only get rich at the expense of others”	59-41	62-38	59-41
Politicians should focus more on... “increasing the economic growth rate” / “climate change, immigration and crime”	39-61	46-54	54-46
MEAN	49-51	57-43	60-40



Zero-sum beliefs

Three of our growth statements align with 'zero sum' thinking:

- 'people can only get rich at the expense of others'
- 'further economic growth will not make people happy or improve the important things in life'
- 'we should focus on making do with less'



French voters are the most zero-sum, whereas UK voters are the least.



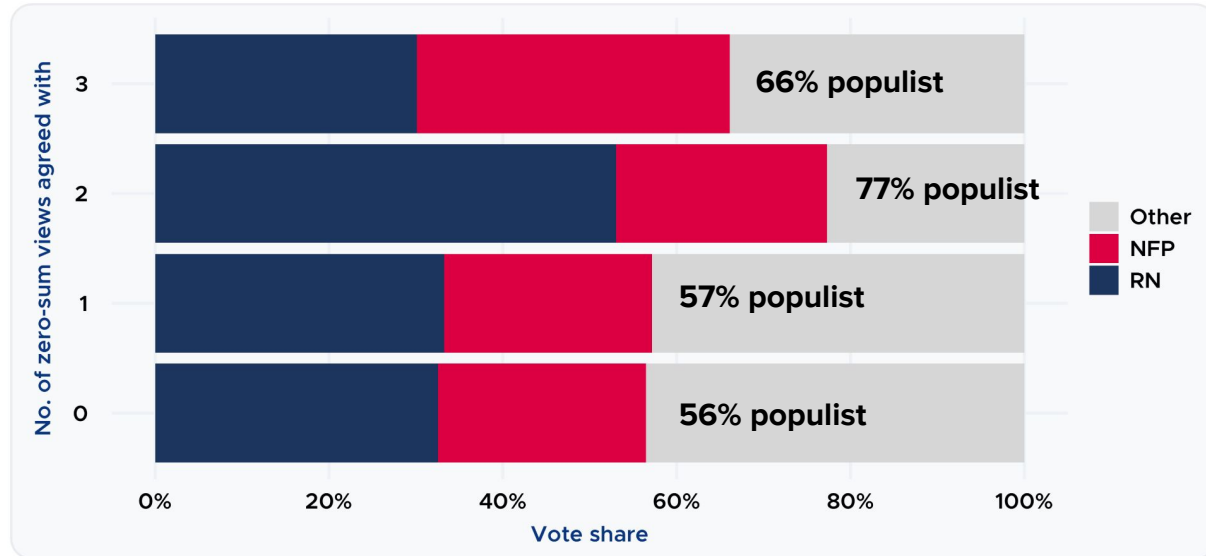
Zero-sum beliefs and populist thinking

In France, agreement with zero-sum statements results in higher support for the two populist grouping of Rassemblement national (RN) and Nouveau Front populaire (NFP).



Zero-sum views lead to populist support in France

FRENCH LEGISLATIVE VOTING INTENTION BY ZERO-SUM VIEW AGREEMENT



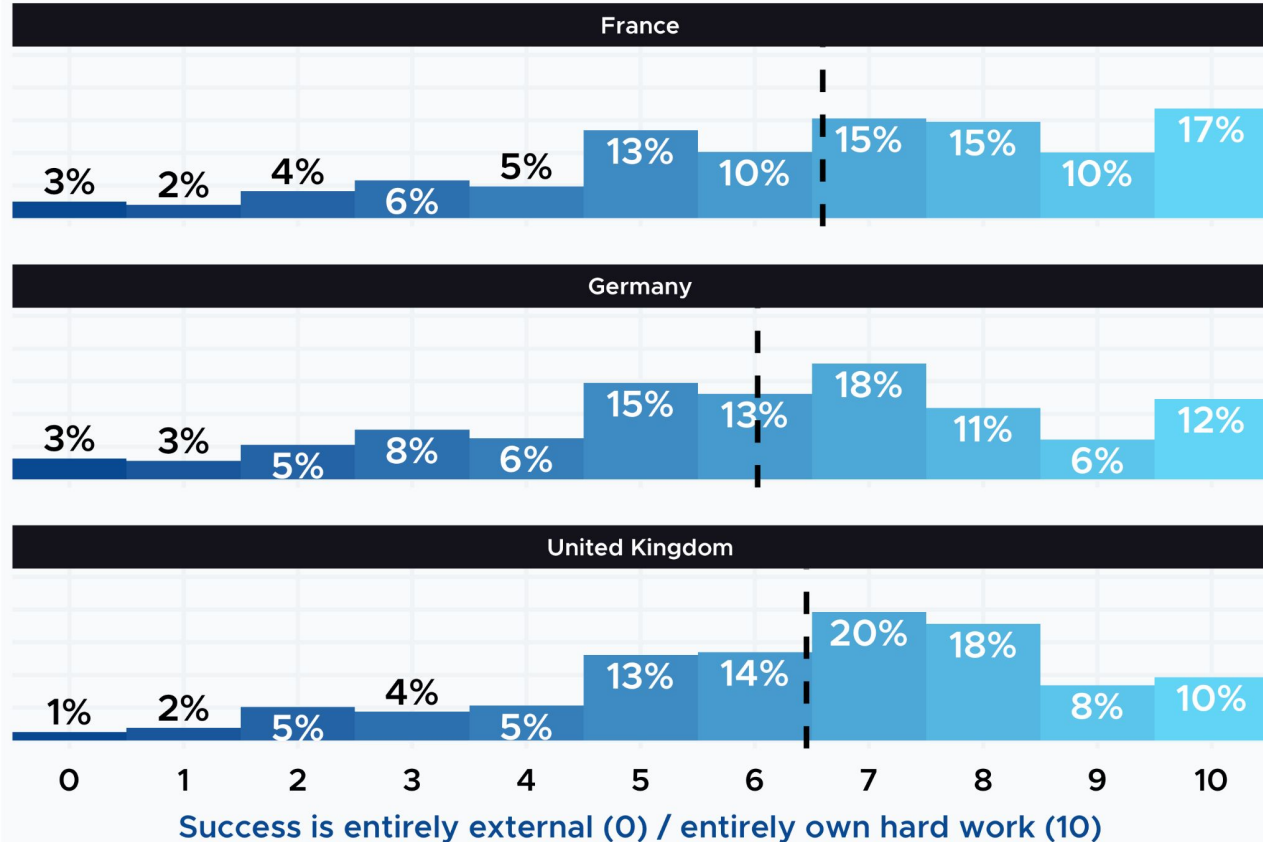
Results from Focaldata polling, 26-28 February 2025





Demotivated beliefs

Germans are most likely to subscribe to the demotivational belief that success is mostly a result of external factors like luck, family wealth or where one was born.





Social spending

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The public wants higher social spending...

“Do you think day-to-day spending on things like unemployment benefits, maternity pay, disability benefits and the state pension should be increased, reduced or stay the same?”

UK:	Increase 39	Same 32	Decrease 18
France:	Increase 44	Same 31	Decrease 17
Germany:	Increase 54	Same 29	Decrease 10



Population aged 65+ will rise between 2025 and 2075

France: **22.5%** to **28.7%**

Germany: **23.7%** to **29.7%**

United Kingdom: **19.7%** to **28.4%**

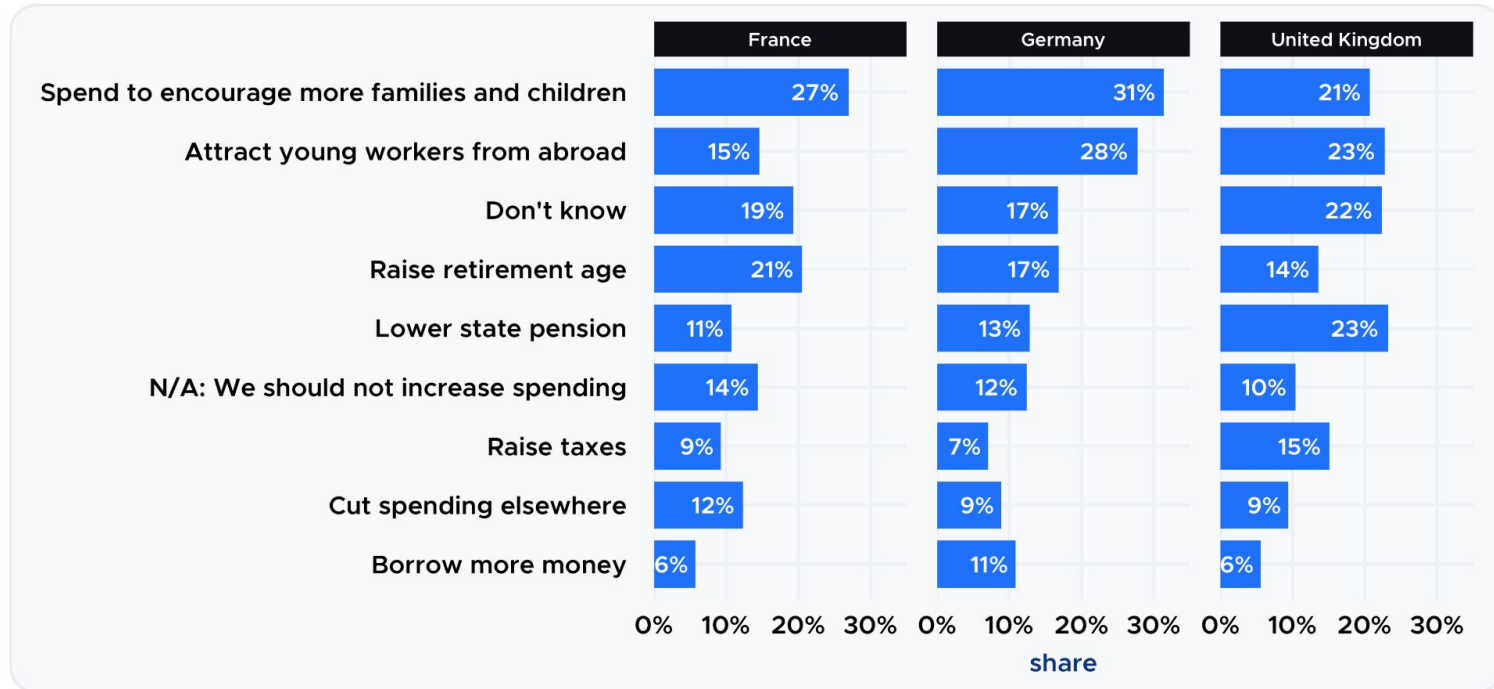
Europe-wide: **20.9%** to **30.0%**

<https://www.populationpyramid.net/sources>



How will higher health & pensions spending be funded?

Little appetite for spending cuts or higher taxes, and very few think we shouldn't increase funding.



www.focaldata.com



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