

2023 Study Among EU Citizens

Regaining the Middle Ground for the Centre-Right

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WHY THIS RESEARCH

- Growing sense of insecurity perceived and experienced by the 'squeezed middle'
- Crisis across multiple fields in last 15 years leading to the successes of anti-establishment 'populist' movements
- How can the centre-right regain the middle ground?

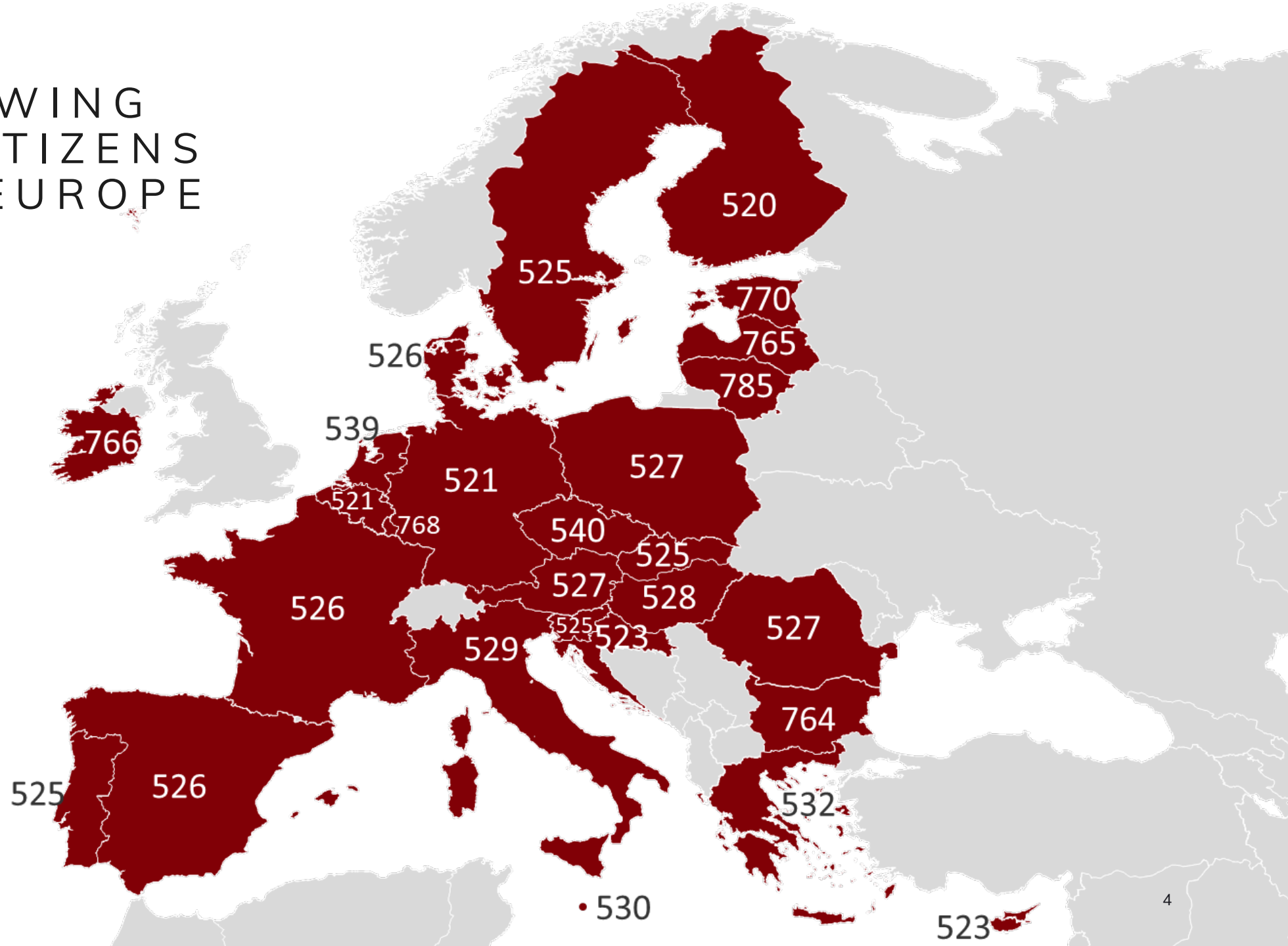


ABOUT THE RESEARCH

- Fieldwork in March & April 2023 in all European Union member states.
- Extensive online survey of 20-25 minutes
- In Malta and Cyprus partly computer-assisted telephone interviews (CATI)
- Quota samples based on national census data (age 18-70, gender, education, region)
- Publication coming soon



INTERVIEWING 15,683 CITIZENS ACROSS EUROPE



AGENDA

Defining & understanding the (middle) classes

Financial security and fear of falling

Security concerns

Thinking about Europe's future

Solutions

The role of the centre-right





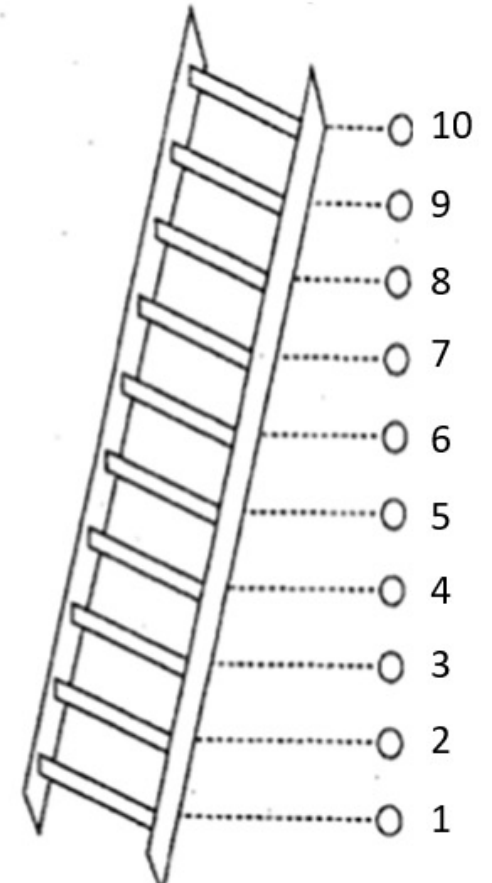
Defining and Understanding the European Middle Classes

DEFINING THE MIDDLE CLASSES

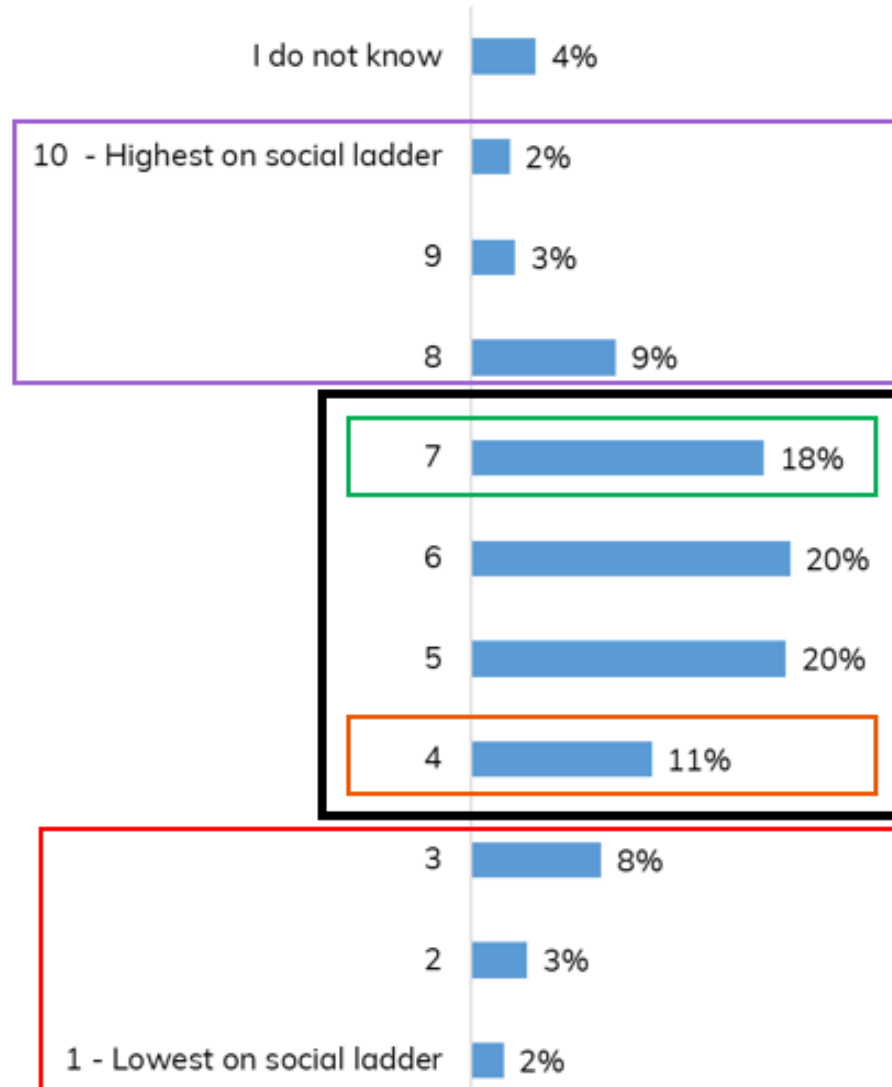
Imagine that this ladder is a picture of how [respondent's country] is set up.

- At the top of the ladder are people that have the most money, the highest amount of schooling, the best jobs and the most respect
- At the bottom are people who have the least money, little or no education, no jobs or jobs that no one wants, and the least respect.

Now think about your family. Can you tell us where you think your family would be on that ladder at the moment?



DEFINING THE EUROPEAN MIDDLE CLASSES



Upper class 14%

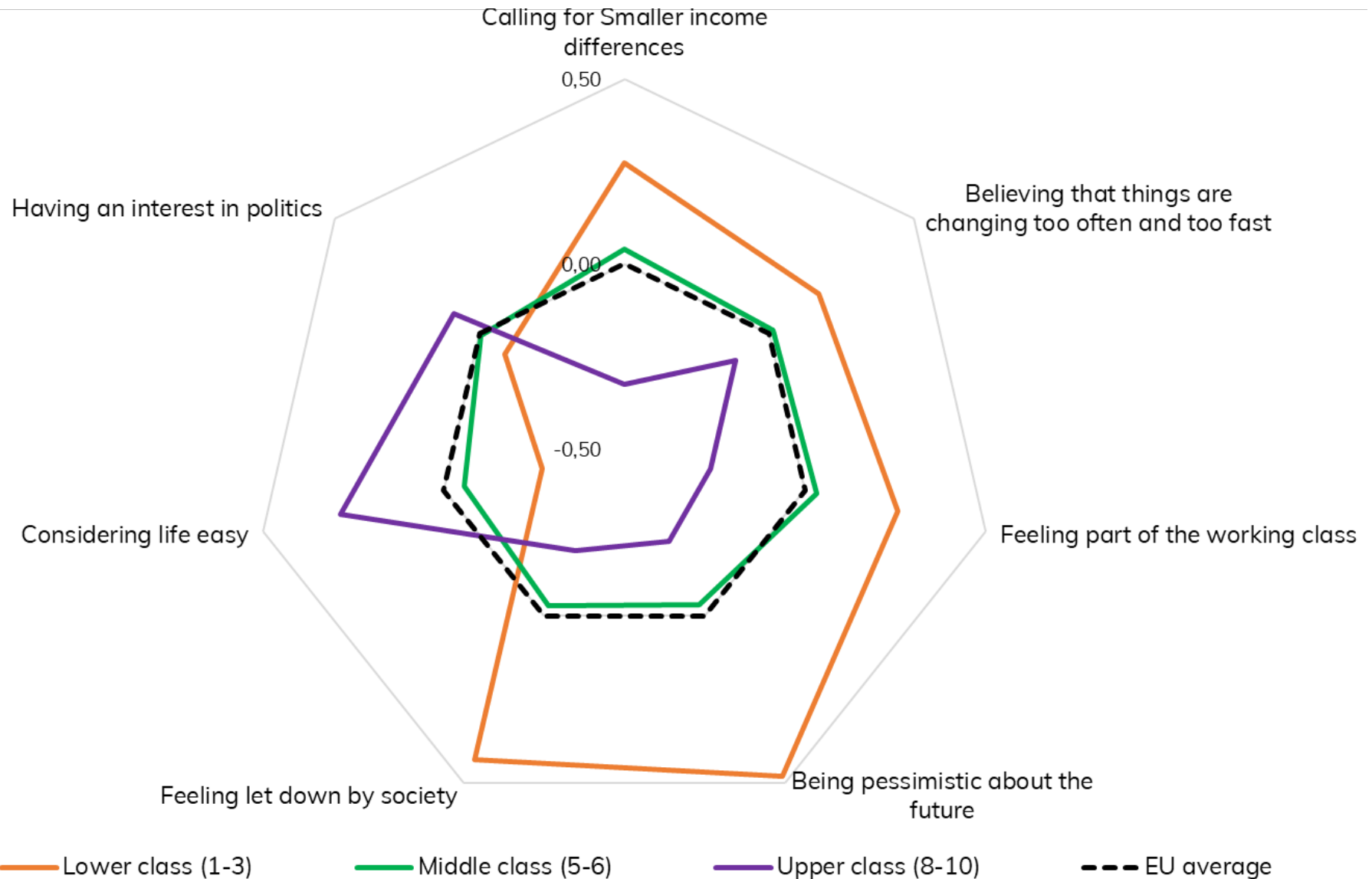
Upper middle class 18%

Middle class 39%

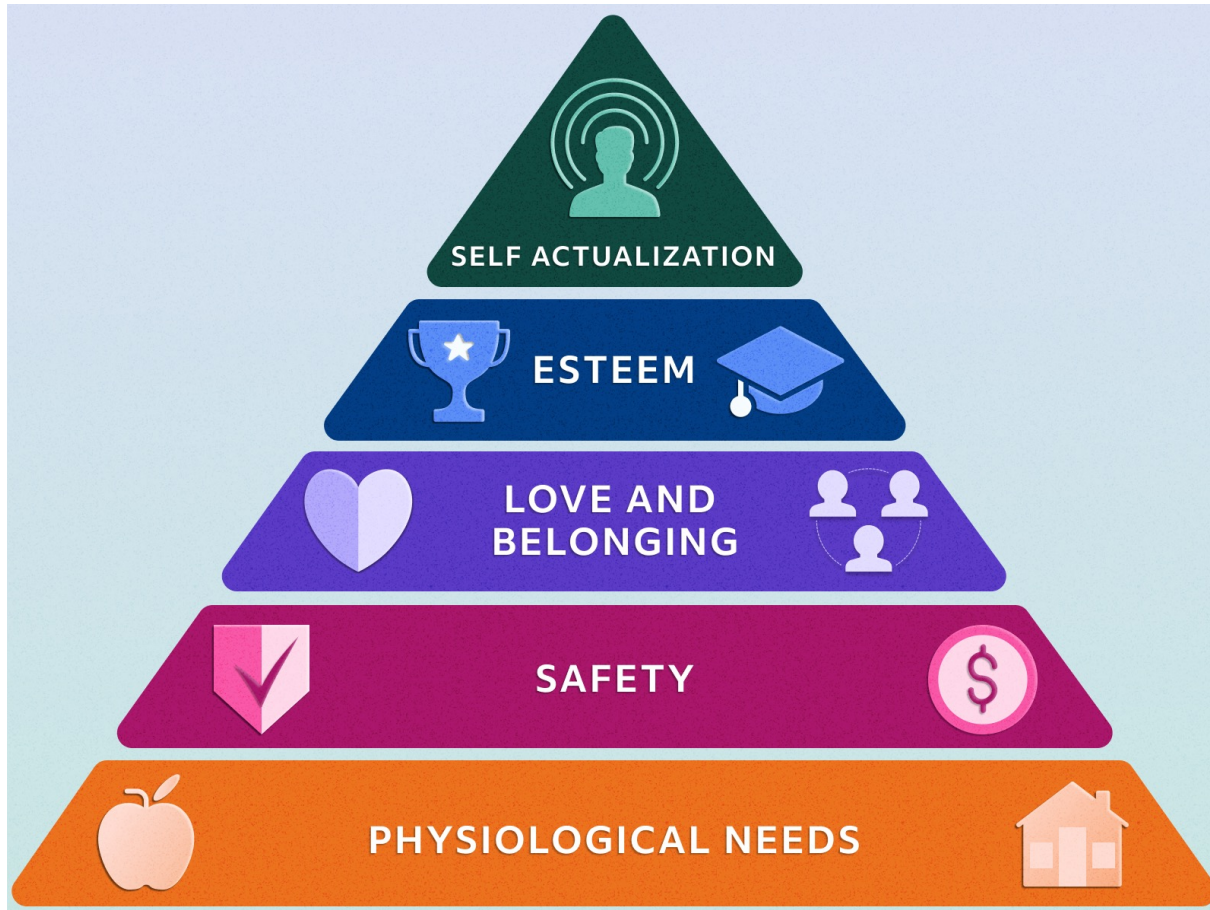
Lower middle class 11%

Lower class 13%

UNDERSTANDING MIDDLE CLASS MINDSET



(RE)CONNECTING WITH THE MIDDLE CLASSES BY ADDRESSING THEIR PRIORITIES



Typical aspirations

Upper class

Looking beautiful

Having clearer goals in life

Having a good career

Having a good family life

Helping their children progress

European Middle Classes

Higher income / salary

*Universal aspiration:
Being healthy*

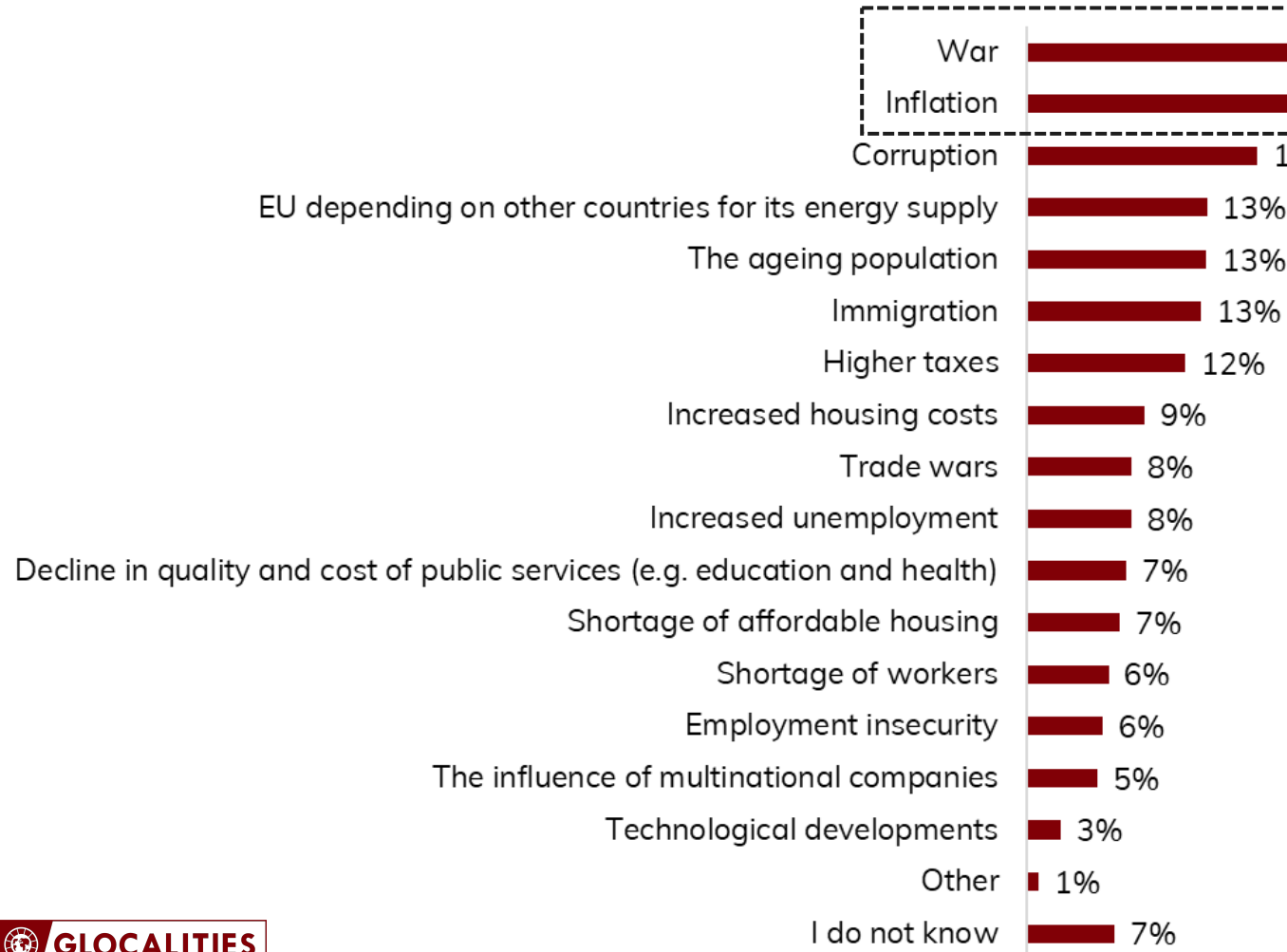
Having their finances under control

Lower class



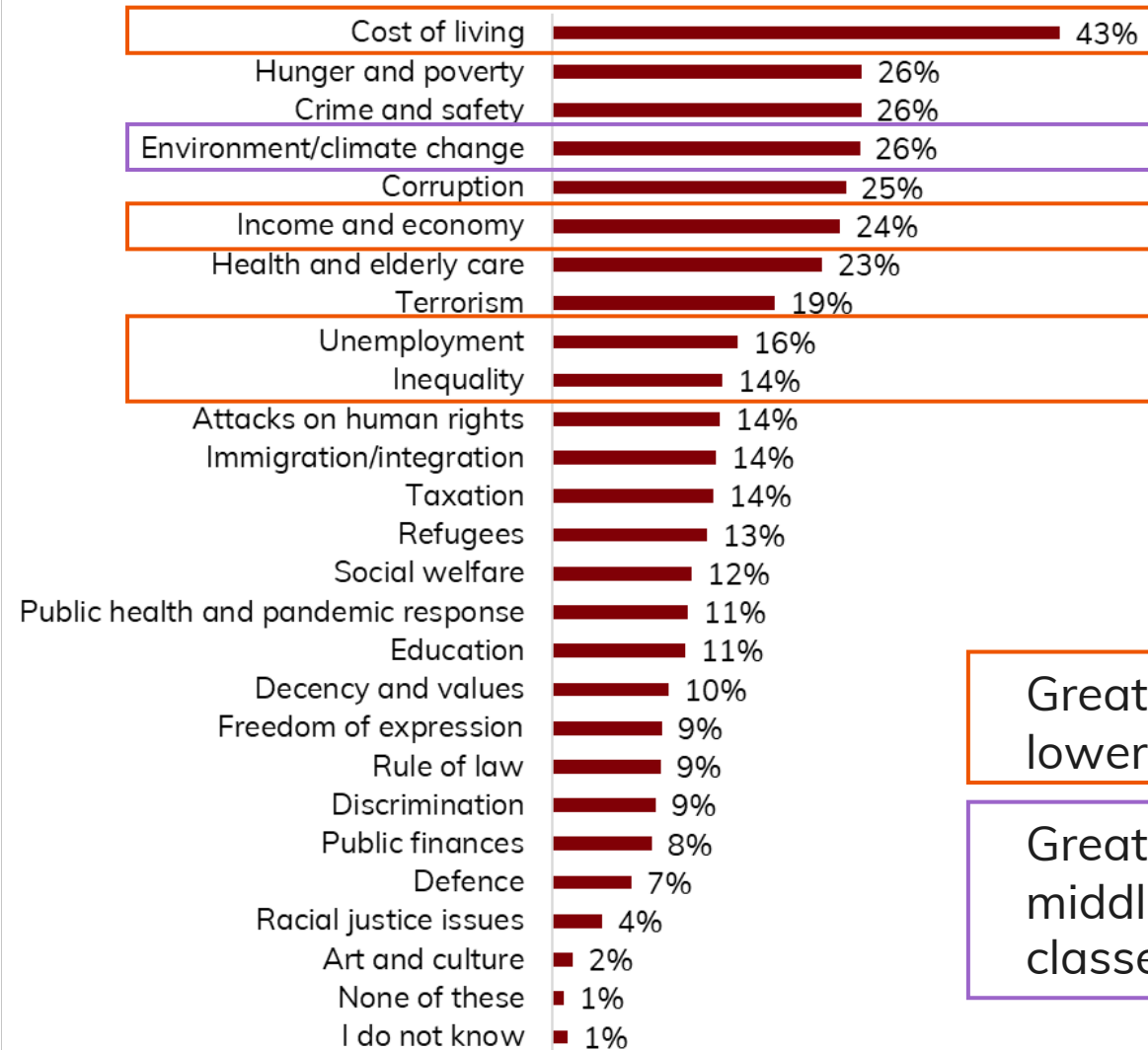
Financial insecurity and fear of falling

WAR AND INFLATION BIGGEST THREATS TO ECONOMIC PROGRESS IN EU (% mentioned)



Greater concern among the lower and middle classes

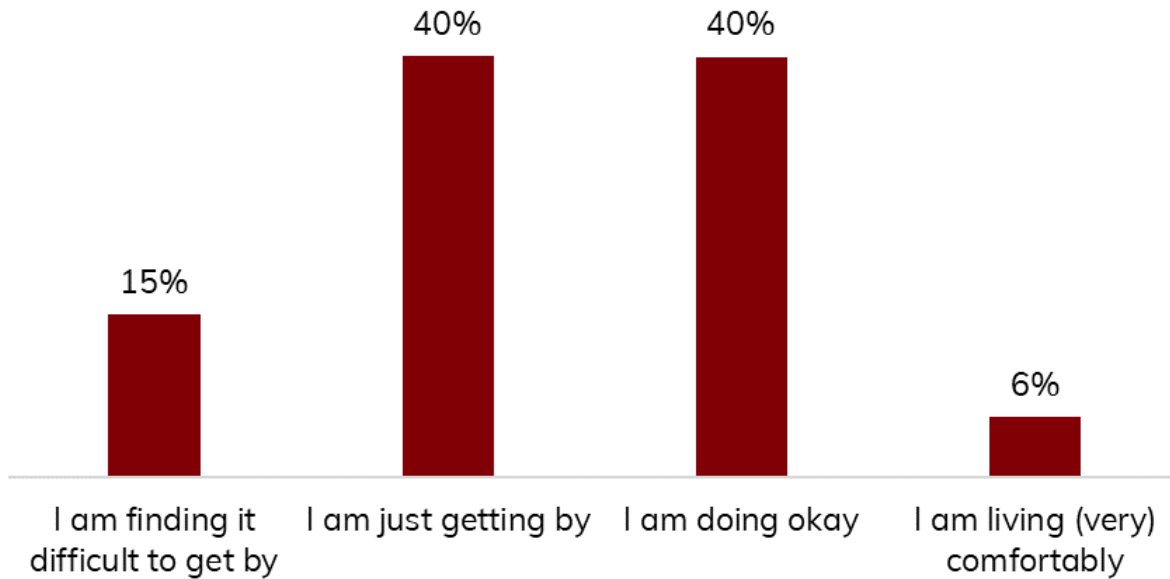
TOPICS OF CONCERN: COST OF LIVING DOMINATES (% mentioned)



Greater concern among the lower (middle) classes

Greater concern among the middle and upper middle classes

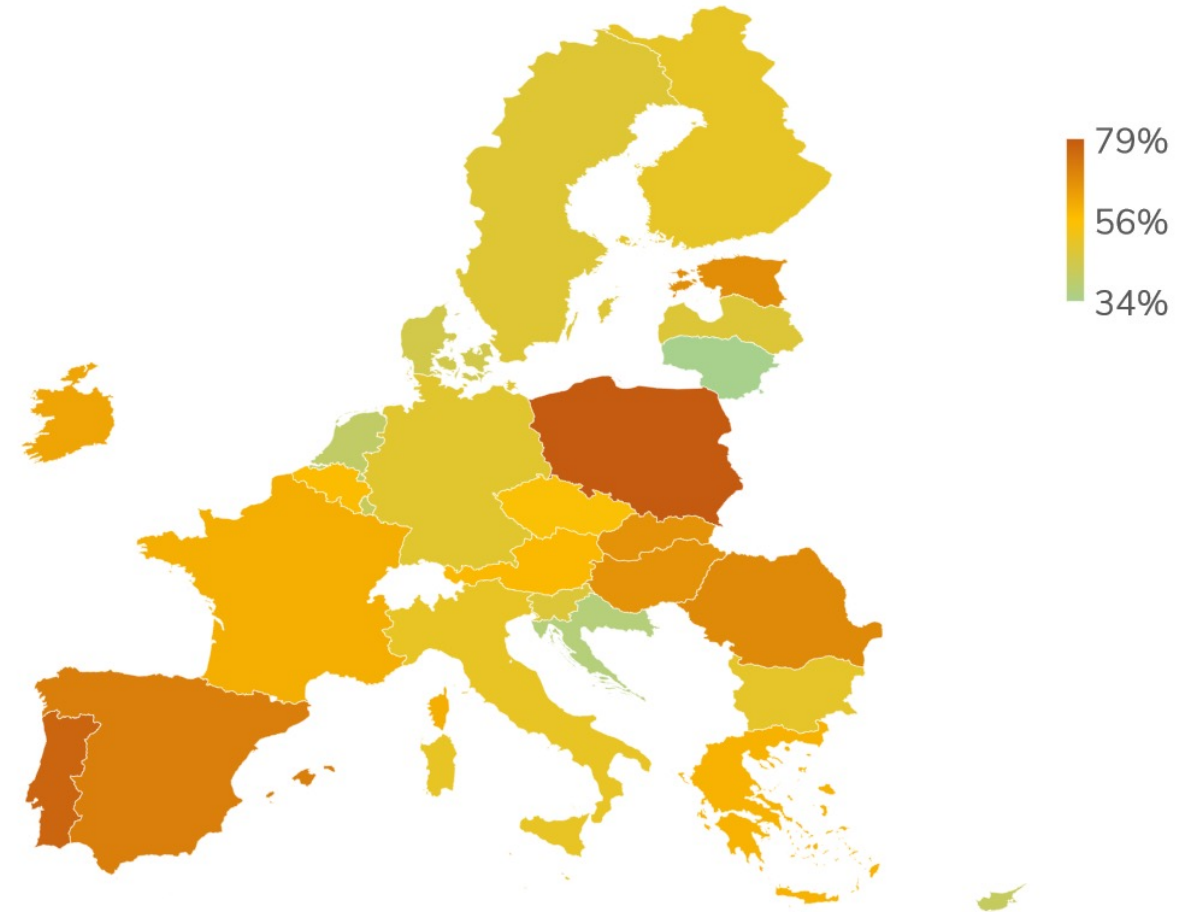
ECONOMIC CONCERNS – COST OF LIVING CRISIS



55% overall struggle

- 72% among lower middle class
- 54% among middle class
- 36% among upper middle class

% I am finding it difficult to get by + I am just getting by



MORE PESSIMISM AMONG THE LOWER (MIDDLE) CLASS

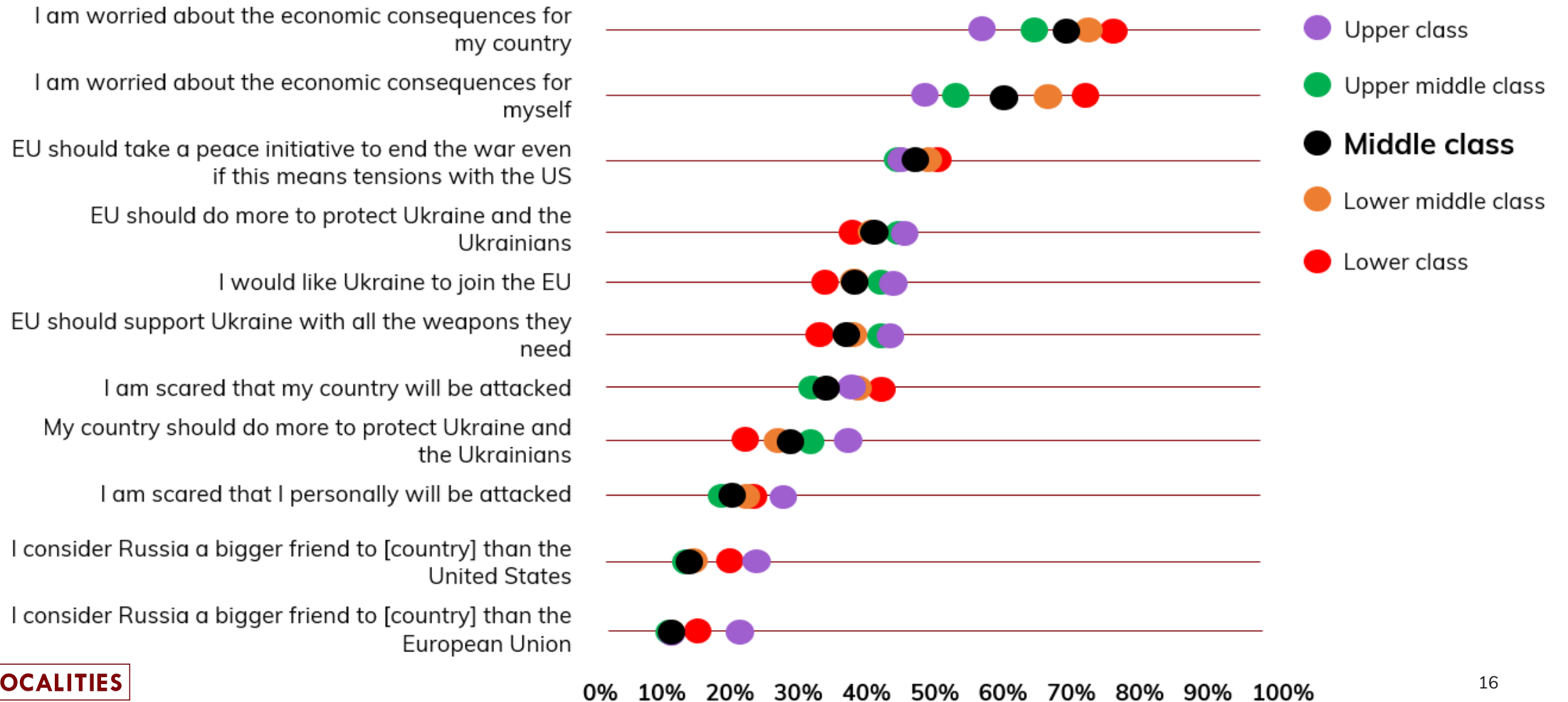
How do you think that your country will evolve in the near future regarding the topics below?

(% answering “things will get worse”)

	Lower class (1-3)	Lower middle class (4)	Middle class (5-6)	Upper middle class (7)	Upper class (8-10)
People's standard of living in general	71%	63%	54%	46%	39%
Climate change	58%	57%	55%	50%	45%
Political tensions	63%	59%	53%	50%	43%
Mental public health	64%	57%	51%	47%	41%
Providing more affordable housing	65%	58%	52%	43%	41%
Social security and pensions	65%	56%	50%	45%	40%
Trust in the government	62%	56%	50%	42%	40%
Income inequality	61%	56%	48%	40%	38%
General economic security	62%	54%	47%	41%	38%
Trust in the state	61%	55%	47%	41%	37%
Social welfare	61%	48%	43%	37%	34%
Societal norms, values and morals	54%	48%	43%	39%	35%
Physical public health	55%	47%	41%	37%	35%
Tensions between ethnic or religious groups	48%	43%	39%	39%	35%
Trust in each other	50%	43%	36%	33%	31%
People who drop out of the community of	48%	39%	35%	34%	32%
Quality of education	46%	39%	33%	31%	31%
Biodiversity	42%	33%	32%	31%	32%
Creating jobs	44%	37%	31%	25%	26%
My own standard of living	55%	40%	29%	20%	22%
Chance that [country] gets involved in war	36%	28%	25%	23%	25%
The knowledge economy	35%	27%	25%	20%	23%
Equality between men and women	23%	14%	14%	12%	16%

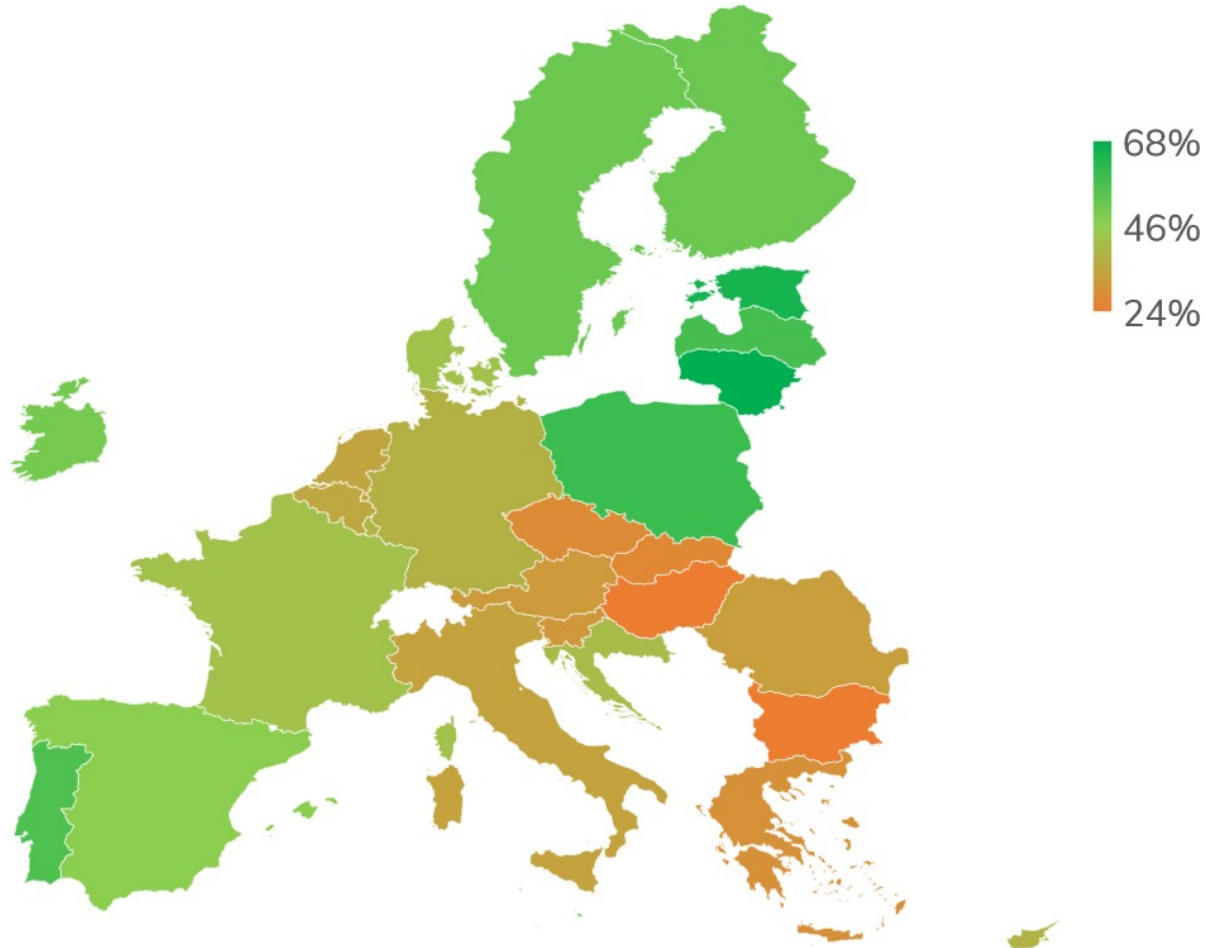
SECURITY CONCERNS AND THE WAR IN UKRAINE

To what extent do you agree with the following statements in relation to the ongoing war in Ukraine? (% agree + strongly agree)



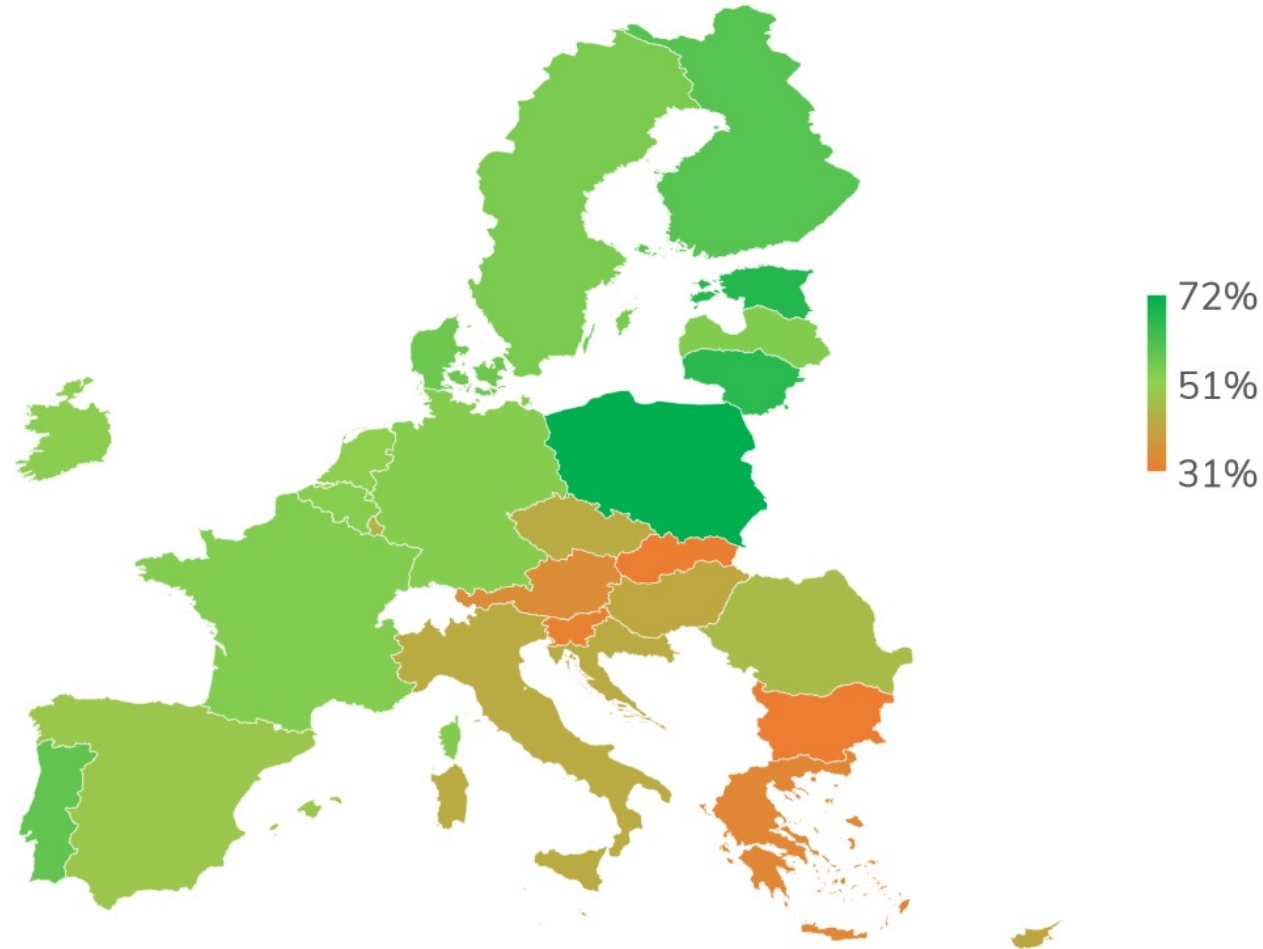
SECURITY CONCERNS & GEOGRAPHIC DIFFERENCES

EU should do more to protect Ukraine and the Ukrainians



SECURITY CONCERNS & GEOGRAPHIC DIFFERENCES

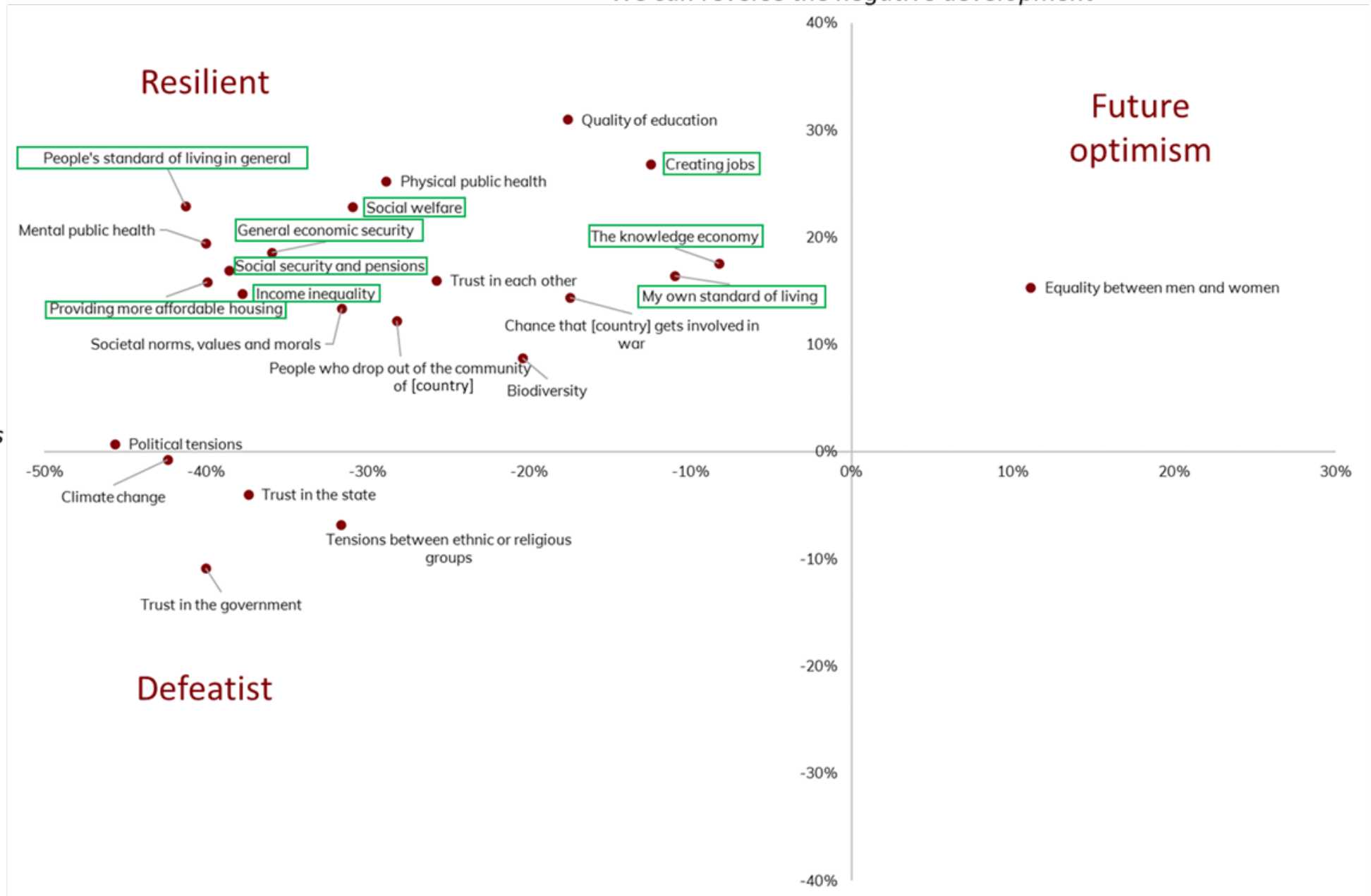
The European Union and the United States of America should be close allies and act together on the international scene to counter authoritarian powers like China and Russia



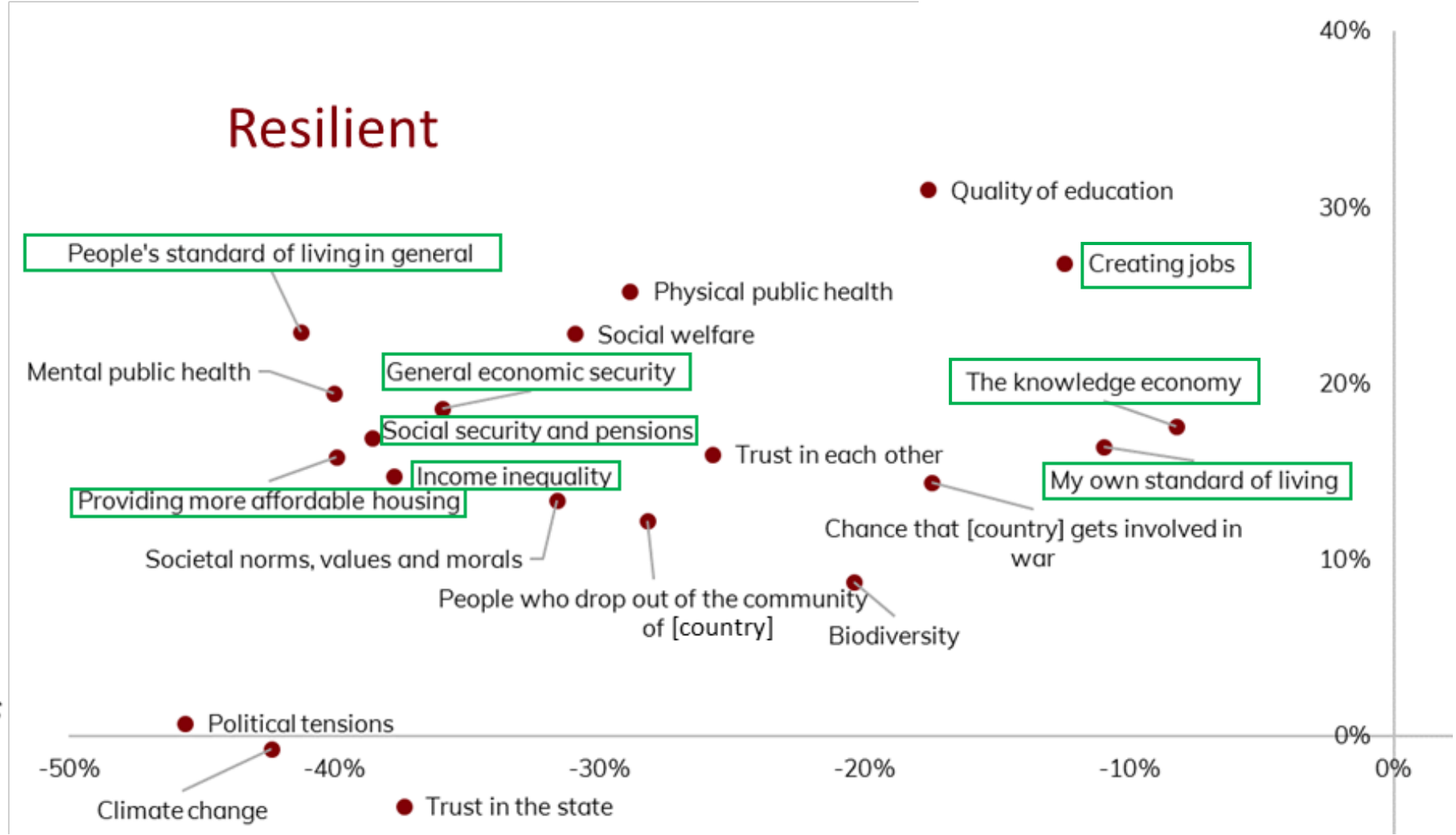
Thinking about
Europe's future



We can reverse the negative development



We can reverse the negative development



Expecting things to get worse

UNDERSTANDING THE PAST IS KEY TO SHAPING A BETTER FUTURE

Which five words from the list below do you think best fit the development of European society in the past 30 years? (% mentioned)



HOW CITIZENS ENVISION THE FUTURE OF EUROPE

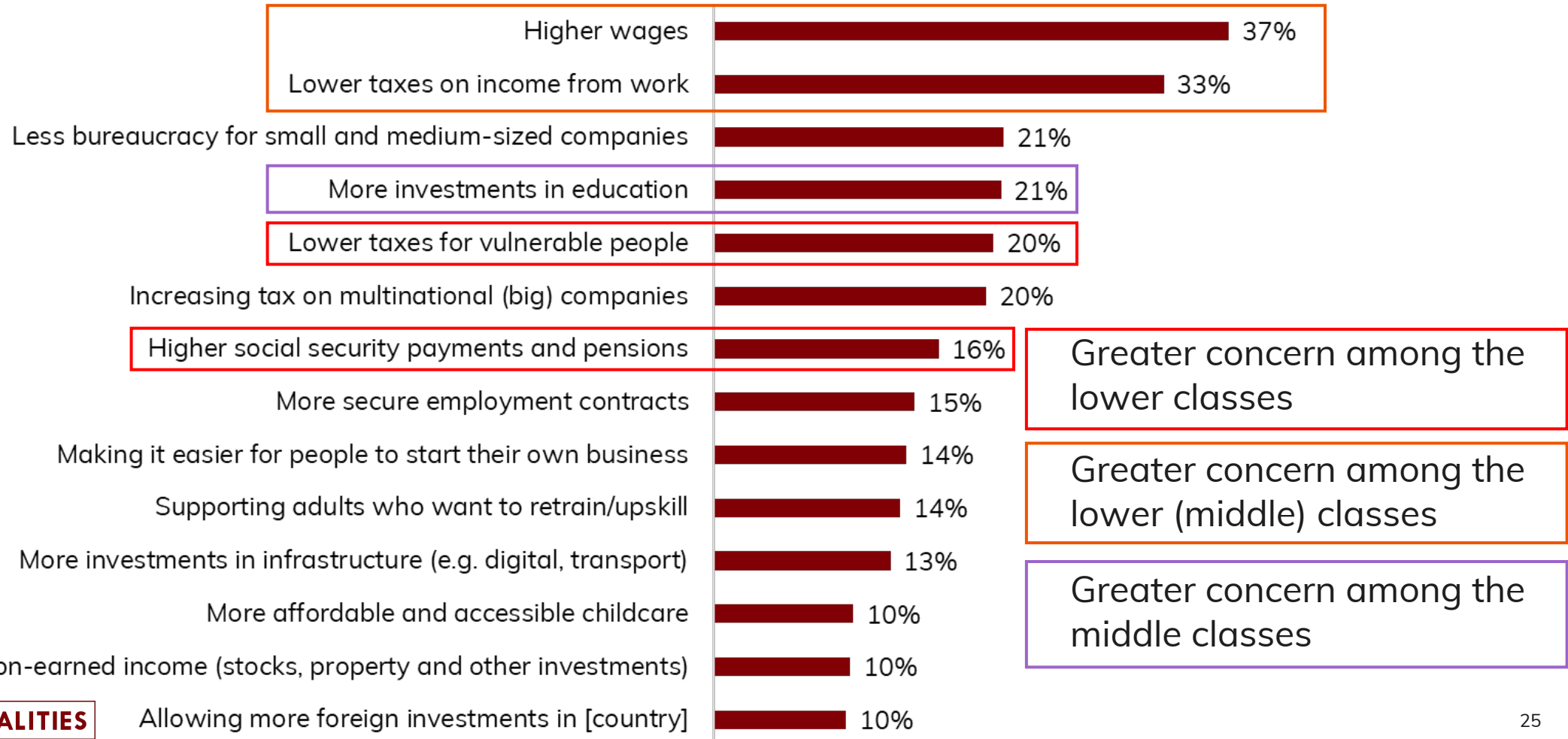
What do you think should be the three most important qualities of European society in the next 30 years in order to overcome threats and challenges? (% mentioned)





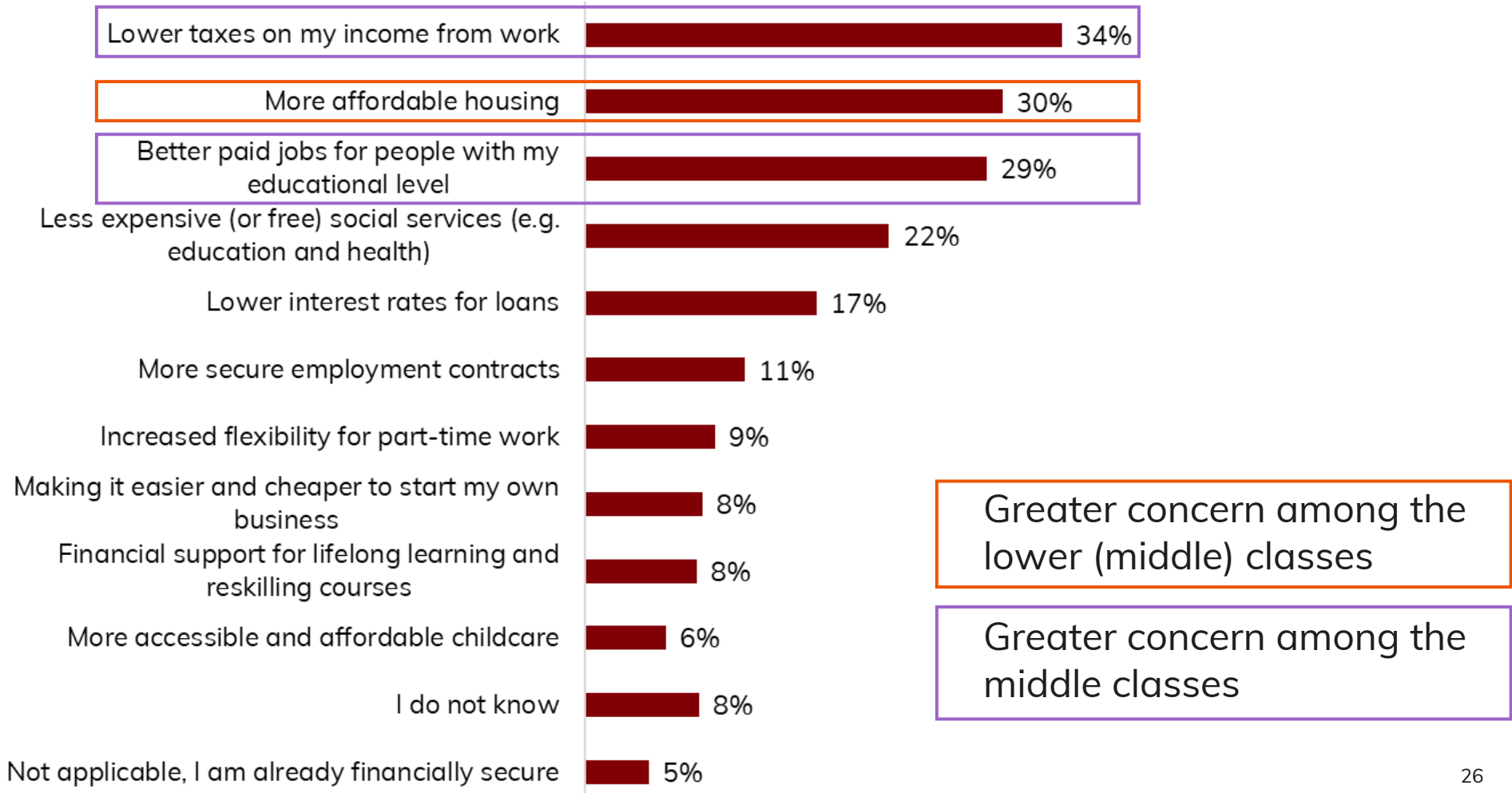
IMPROVING COUNTRIES' ECONOMIES

What do you see as possible solutions to improving the economy in your country? (% mentioned)



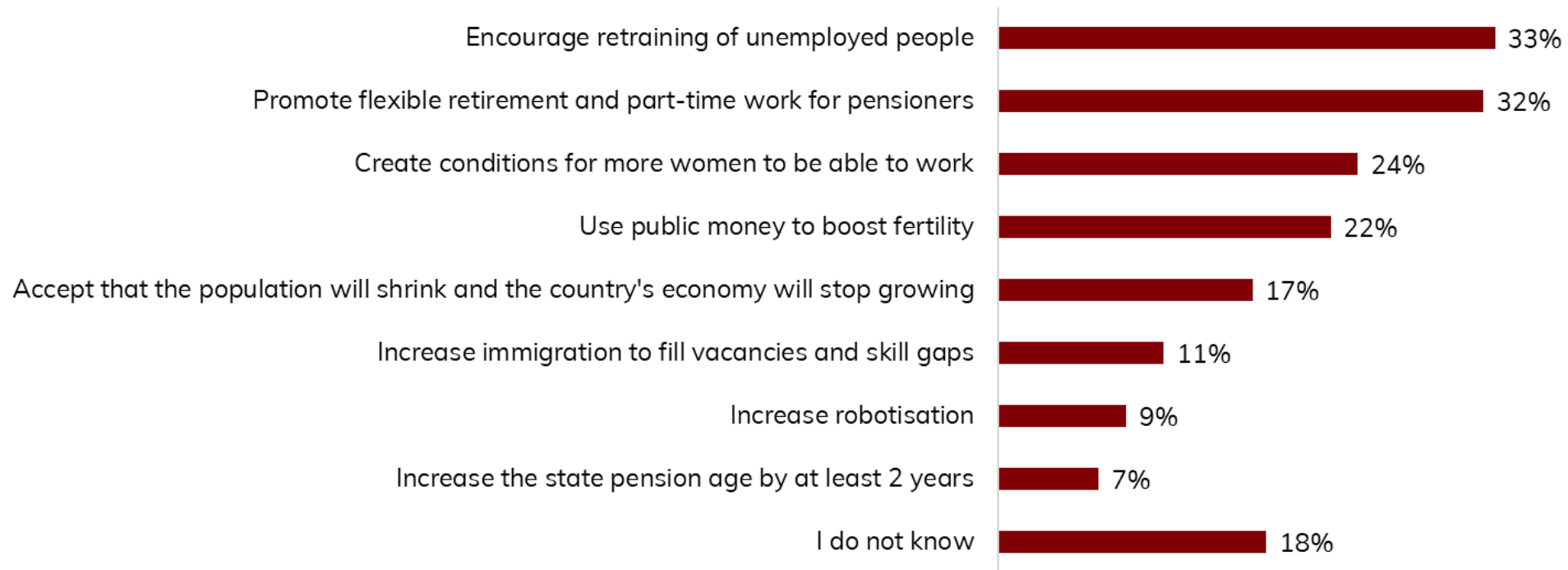
HELPING PEOPLE FEEL MORE FINANCIALLY SECURE

Which two of the proposed solutions below would help you feel more financially secure? (% mentioned)



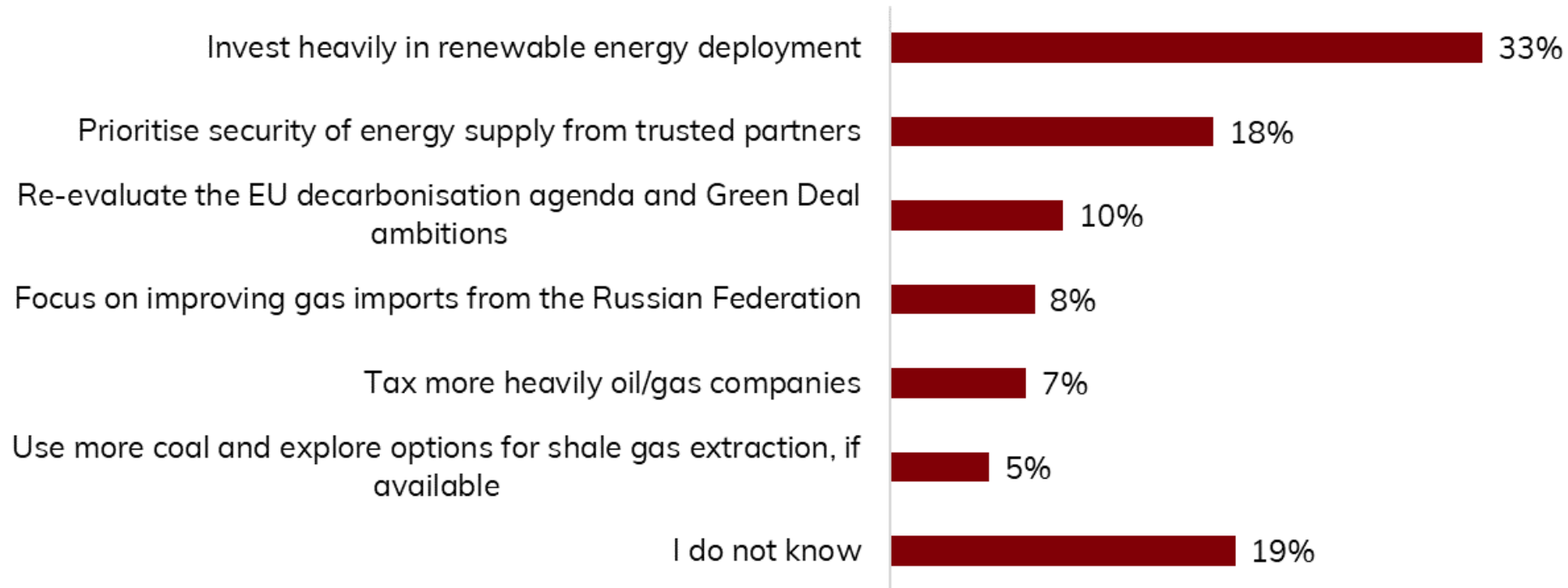
ADDRESSING THE AGING POPULATION ISSUE

European societies are rapidly aging. To address this, my government should...



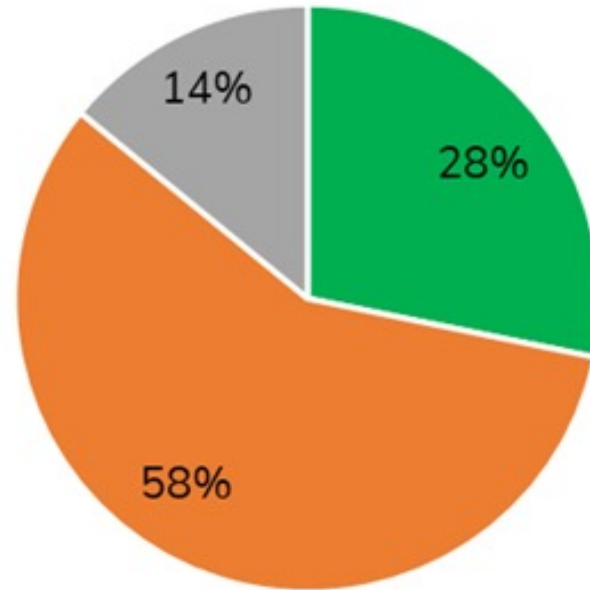
FACILITATING ENERGY TRANSITION

The war in Ukraine caused an energy crisis...As a response, EU member states should...
(% mentioned)



ONLY A MINORITY IS WILLING TO PAY HIGHER TAXES FOR BETTER PUBLIC SERVICES

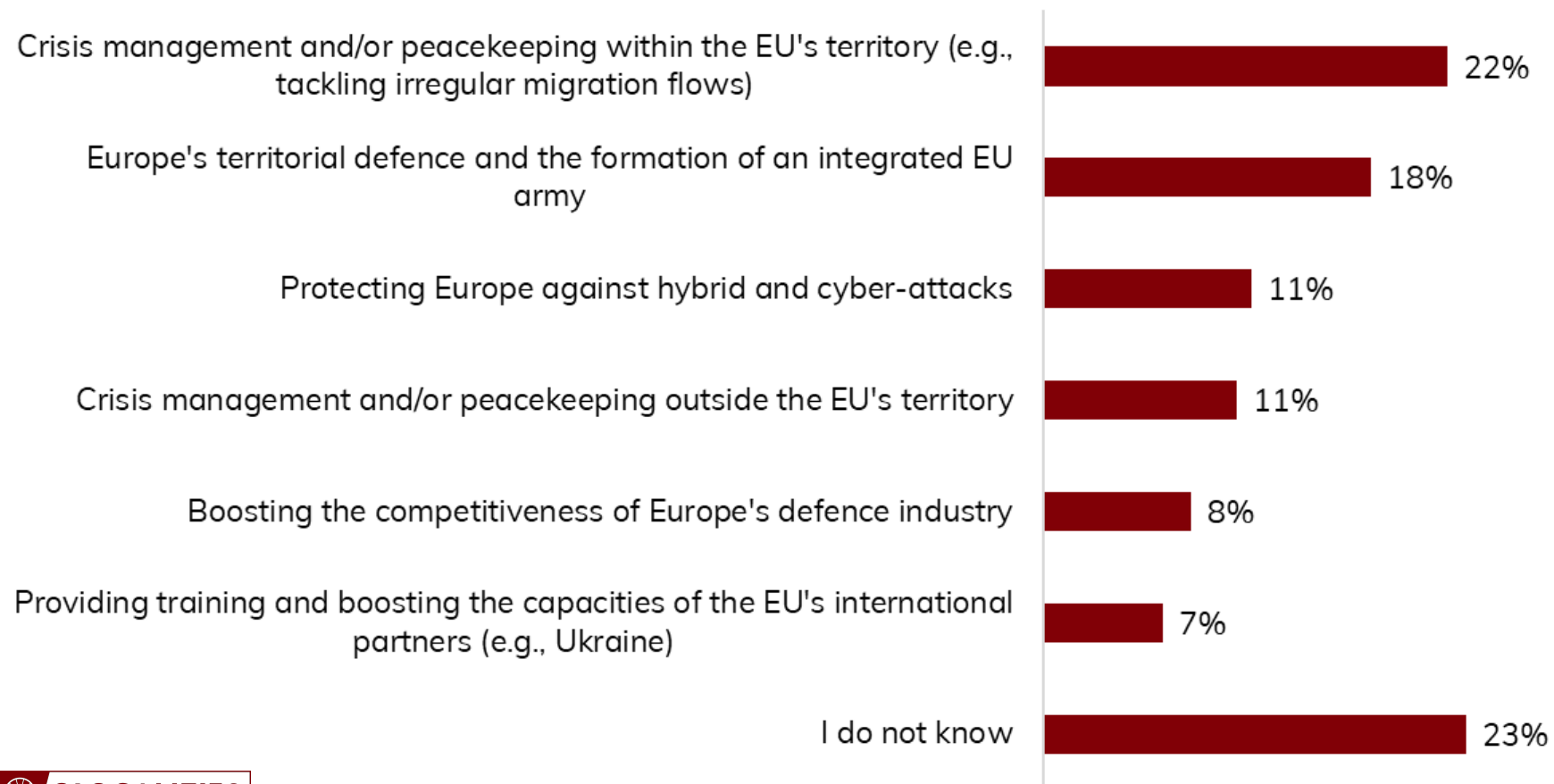
Would you agree with paying higher taxes to fund better public services (health, education etc.)?



■ Yes ■ No ■ I do not know

VIEWS ON COMMON SECURITY & DEFENCE POLICY

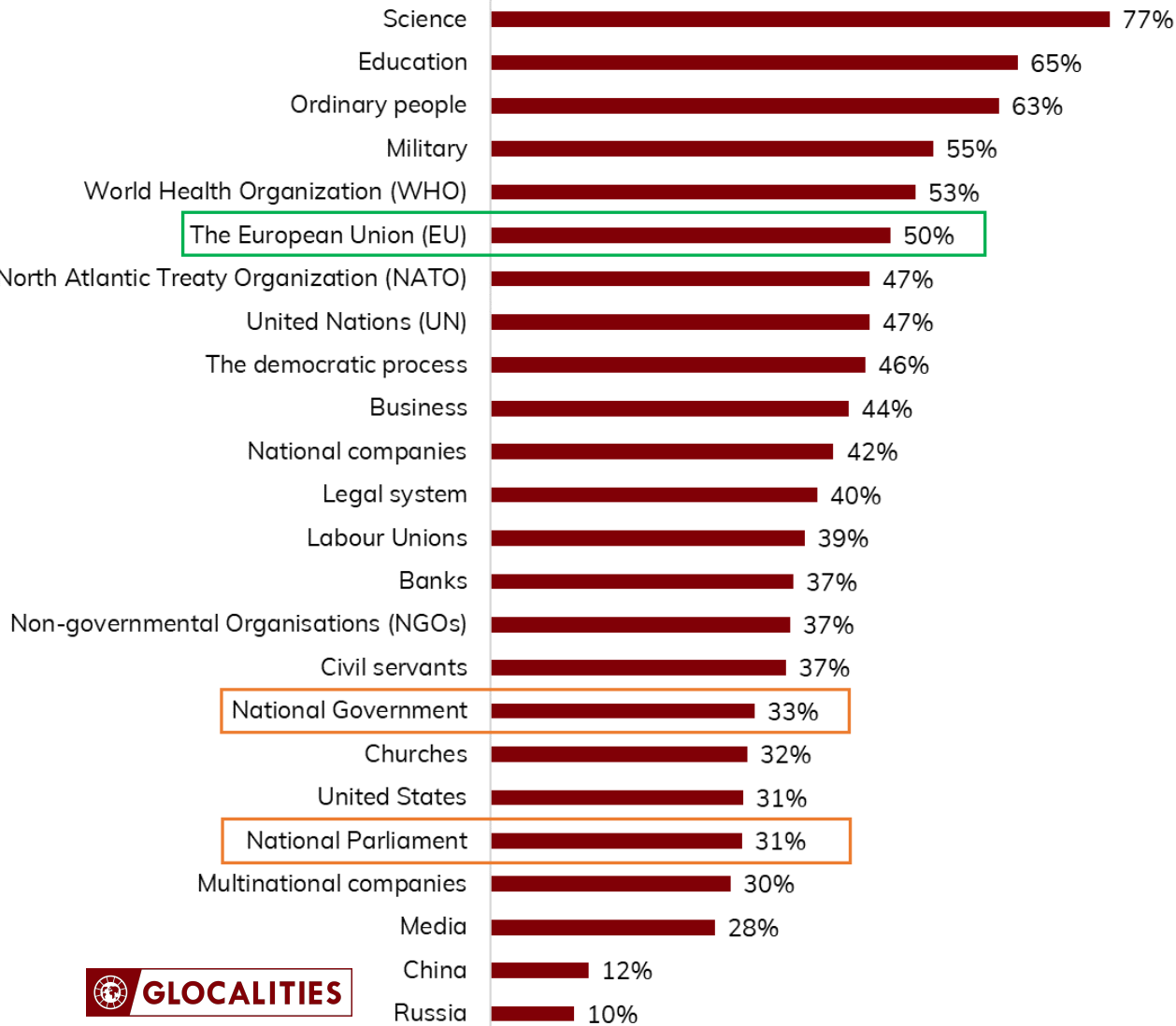
The European Union has a common security and defence policy. In your opinion, the main purpose of this policy should be: (% mentioned)





Trust, the democratic process & opportunities for the centre-right

EU TRUST IS HIGH AND AT 50% IN MIDDLE CLASS



% Trust in:	Lower class (1-3)	Lower middle class (4)	Middle class (5-6)	Upper middle class (7)	Upper class (8-10)
The European Union (EU)	37%	46%	50%	58%	59%
National Government	21%	28%	31%	42%	45%
National Parliament	19%	25%	30%	40%	45%

TRUST CRISIS AMONG LOWER (MIDDLE) CLASS

Please indicate
your general trust
in the following:
(% Trust)

	Social ladder lower class (1-3)	Lower middle class (4)	Middle class (5- 6)	Upper middle class (7)	Upper class (8- 10)	EU total
Science	70%	79%	78%	82%	77%	77%
Education	54%	63%	66%	73%	72%	65%
Ordinary people	54%	62%	63%	69%	69%	63%
Military	45%	53%	55%	61%	61%	55%
World Health Organization (WHO)	42%	51%	53%	61%	59%	53%
The European Union (EU)	37%	46%	50%	58%	59%	50%
The North Atlantic Treaty Organization (NATO)	36%	44%	46%	56%	56%	47%
United Nations (UN)	36%	43%	47%	57%	54%	47%
The democratic process	33%	45%	47%	55%	55%	46%
Business	32%	38%	44%	53%	55%	44%
National companies	32%	37%	42%	51%	53%	42%
Legal system	29%	36%	39%	50%	52%	40%
Labour Unions	34%	37%	37%	45%	46%	39%
Banks	27%	33%	37%	45%	48%	37%
Non-governmental Organisations (NGOs)	30%	36%	36%	44%	45%	37%
Civil servants	28%	31%	36%	43%	49%	37%
National Government	21%	28%	31%	42%	45%	33%
Churches	27%	26%	32%	34%	41%	32%
United States	22%	27%	30%	38%	42%	31%
National Parliament	19%	25%	30%	40%	45%	31%
Multinational companies	20%	24%	29%	36%	42%	30%
Media	21%	24%	26%	34%	39%	28%
China	11%	11%	10%	12%	20%	12%
Russia	10%	9%	9%	9%	18%	10%

GROWING DISTRUST IN RUSSIA

TRUST RUSSIA

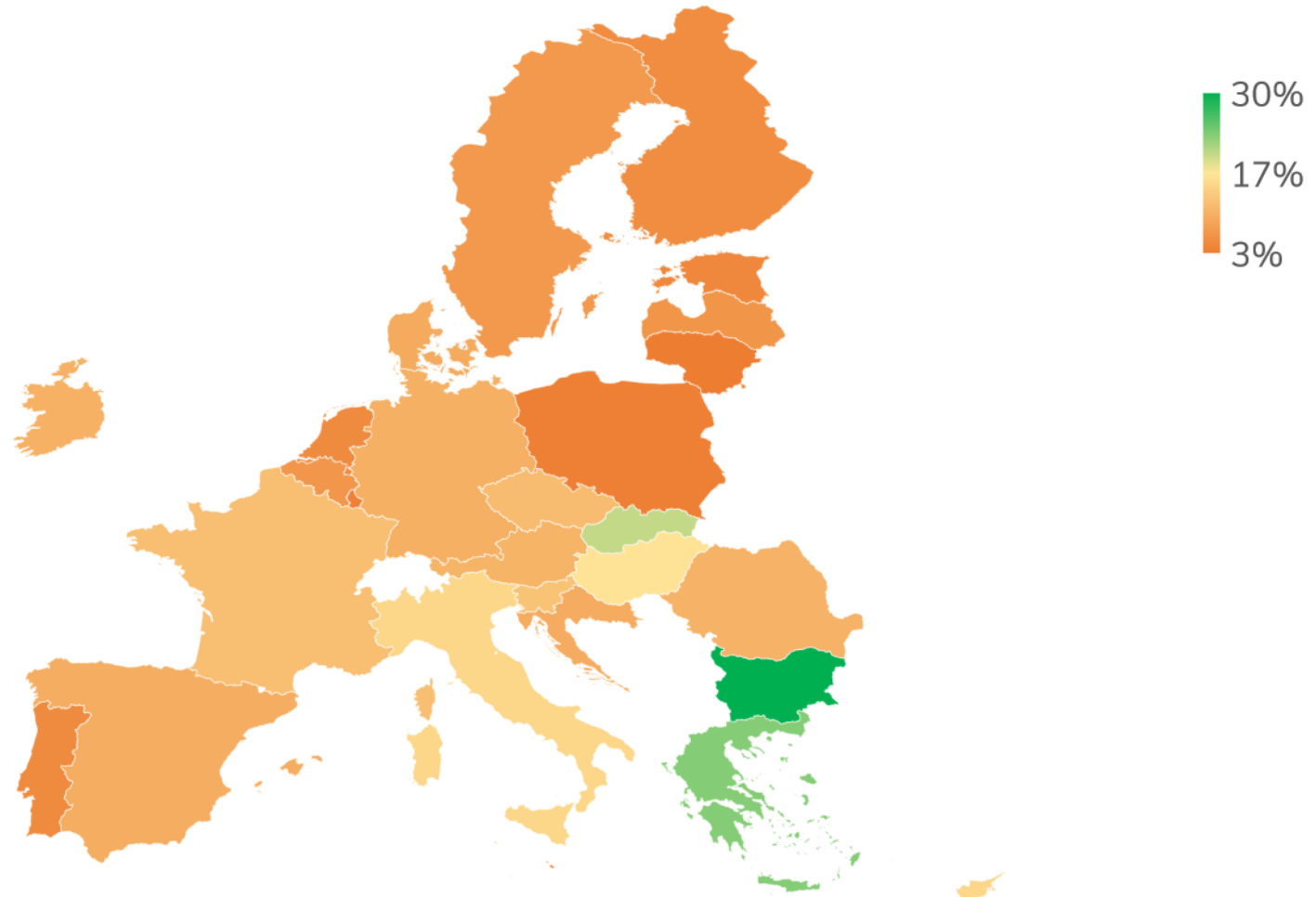
	Austria	Belgium	Denmark	France	Germany	Hungary	Italy	Netherlands	Poland	Romania	Sweden
2023 Martens Centre study	10%	7%	9%	12%	10%	16%	15%	5%	4%	10%	7%
2023 Glocalities measurement		8%		8%	9%		9%	5%	3%	10%	6%
2022 Glocalities measurement	11%	9%	5%	12%	12%	30%	15%	8%	6%	10%	8%
2021 Glocalities measurement		9%		11%	9%		14%	10%	7%	12%	8%

DO NOT TRUST RUSSIA

	Austria	Belgium	Denmark	France	Germany	Hungary	Italy	Netherlands	Poland	Romania	Sweden
2023 Martens Centre study	81%	84%	84%	80%	82%	72%	76%	88%	91%	80%	83%
2023 Glocalities measurement		81%		79%	83%		80%	85%	90%	79%	86%
2022 Glocalities measurement	75%	76%	85%	73%	72%	42%	67%	76%	84%	76%	81%
2021 Glocalities measurement		62%		62%	67%		53%	67%	77%	66%	71%

BUT VARYING MINORITIES HAVE TRUST IN RUSSIA

Trust in Russia



AGENTS OF CHANGE & THE ROLE OF POLITICAL PARTIES

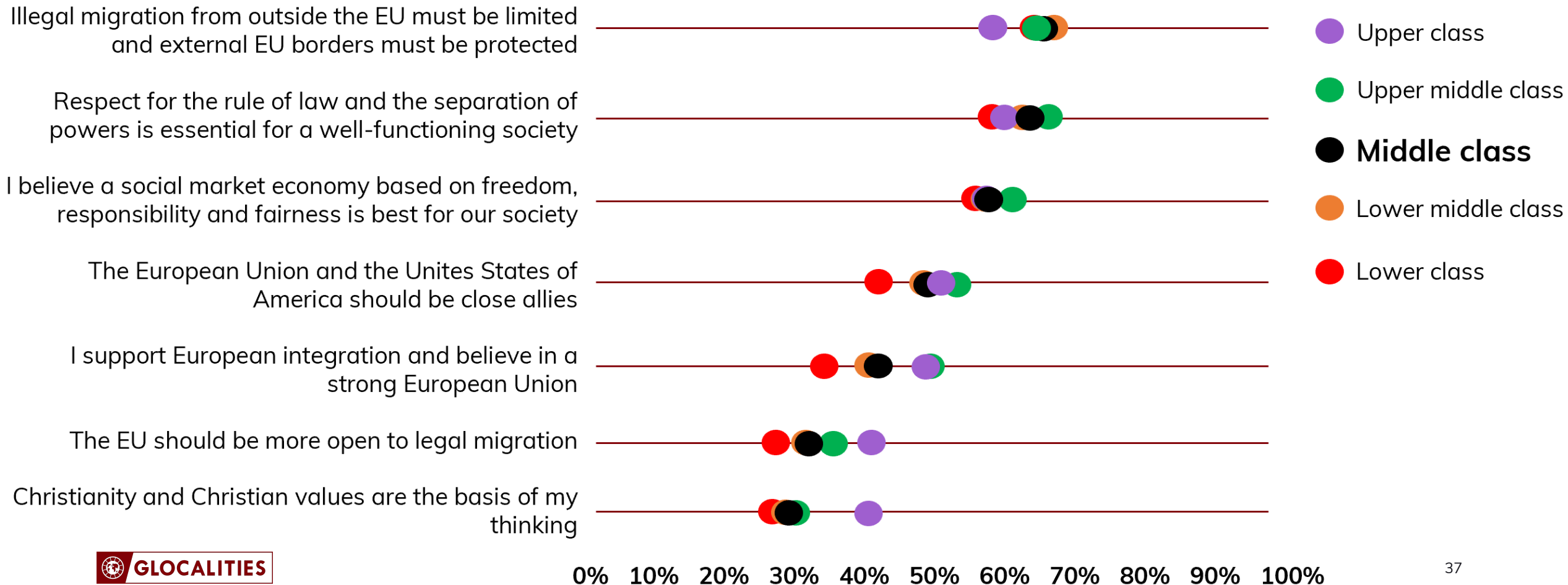
Who would you trust to solve problems in society? (% mentioned)

	Lower class (1-3)	Lower middle class (4)	Middle class (5-6)	Upper middle class (7)	Upper class (8-10)
Civil society	27%	33%	32%	32%	31%
European Union	21%	24%	27%	28%	31%
My national government	19%	24%	25%	30%	28%
Entrepreneurs	15%	18%	18%	22%	20%
Public administration	12%	13%	15%	18%	20%
Political parties	12%	12%	12%	15%	17%
National companies	9%	11%	12%	14%	16%
Financial actors	8%	9%	11%	13%	14%
Multinational companies	5%	6%	8%	10%	12%
None of these	24%	15%	14%	11%	10%

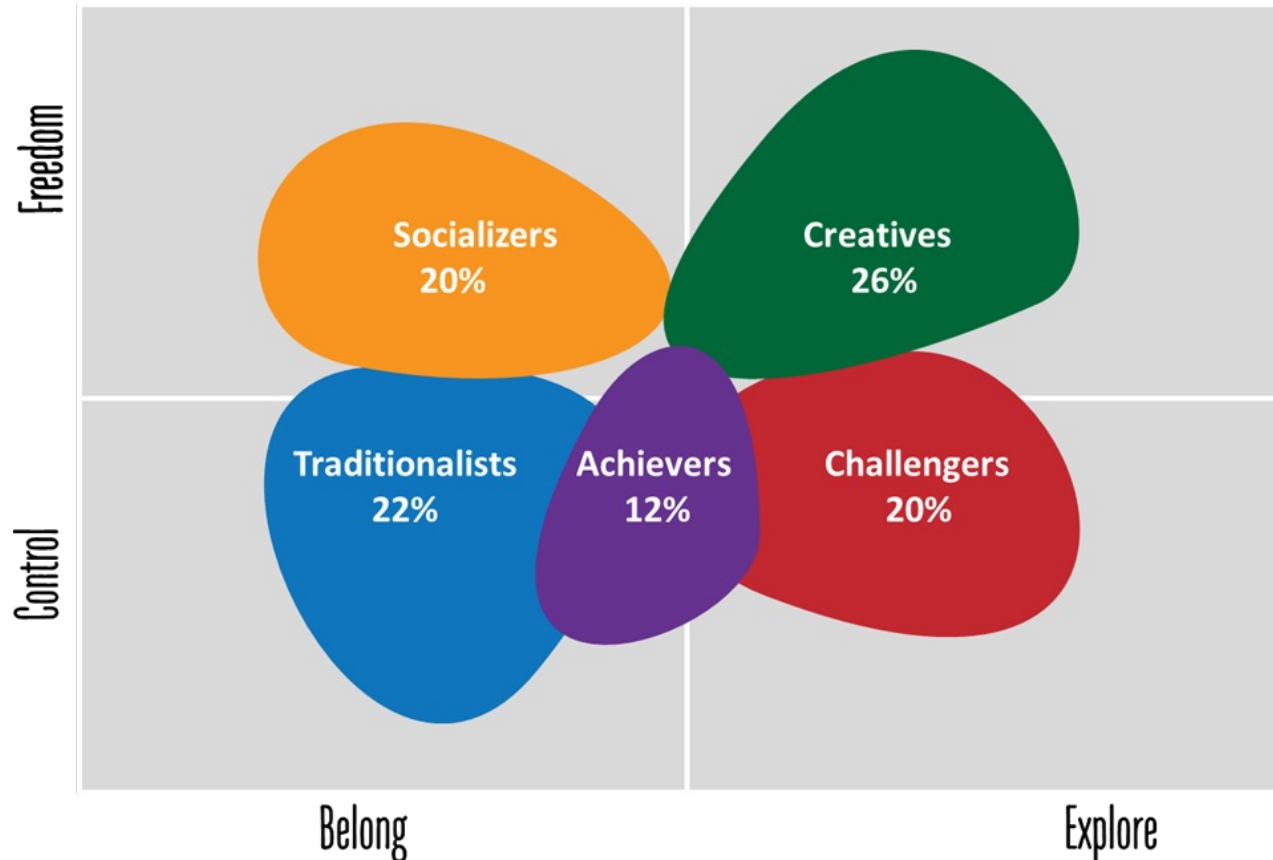
VIEWS ON CENTRE-RIGHT VALUES ABOUT SOCIETY AND ECONOMY

To what extent do you agree with the following statements about your outlook on life?

(% agree + strongly agree)

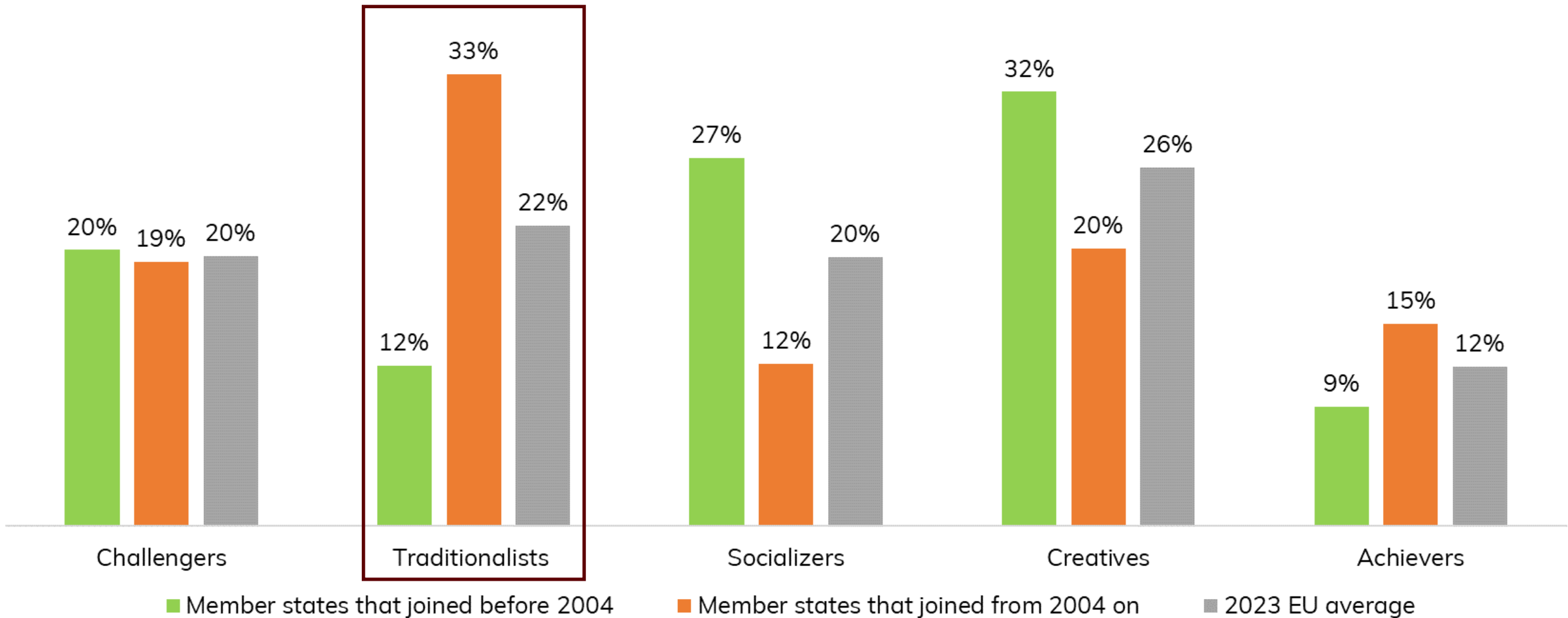


MIDDLE CLASS VALUES ARE NOT HOMOGENOUS: 5 DISTINCT VALUES SEGMENTS

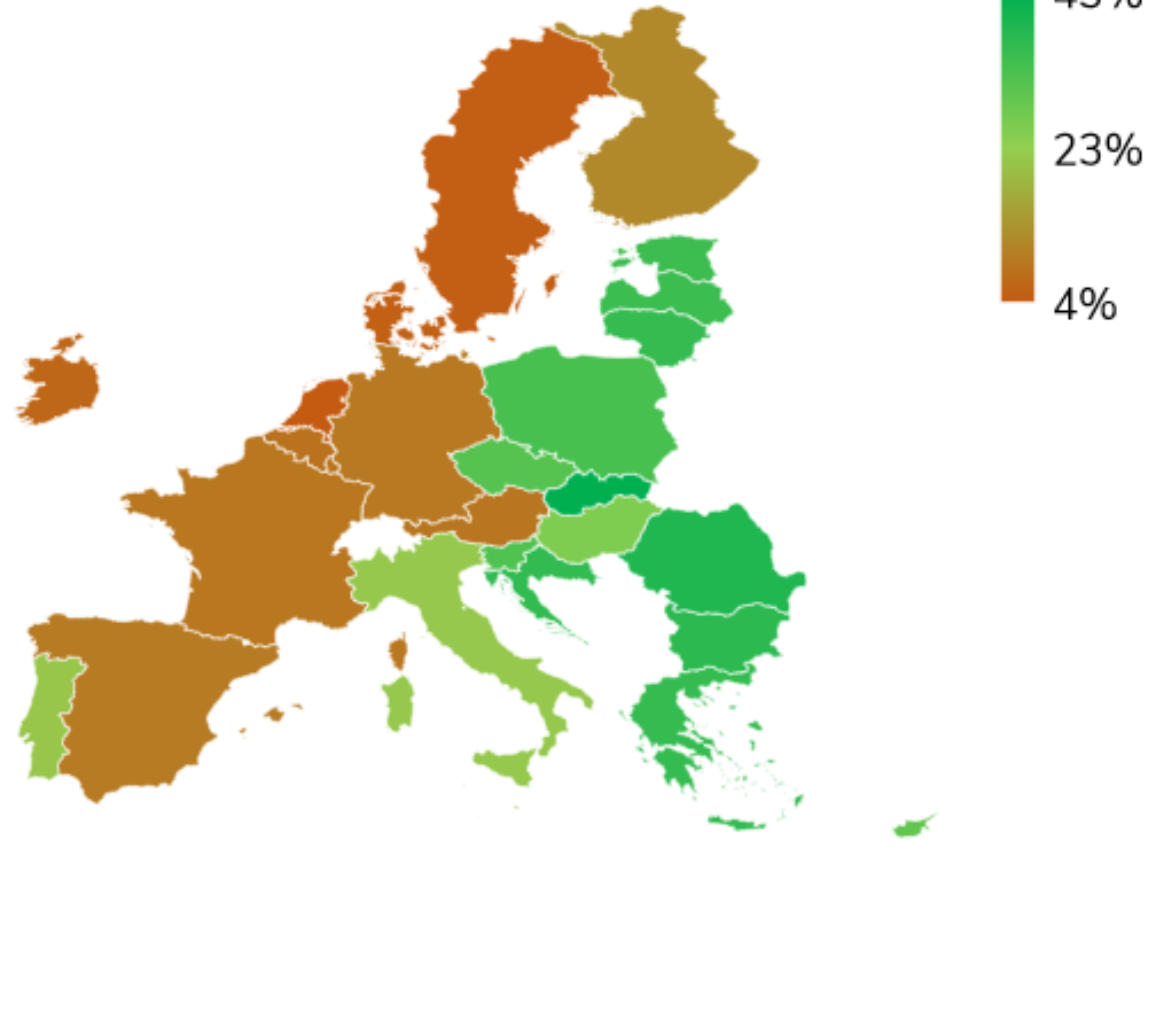


- **Traditionalists:** Family-oriented people who value traditions, etiquette and an organized life.
- **Creatives:** Open-minded idealists who adhere to self-development and culture.
- **Challengers:** Competitive careerists, fascinated by money, taking risks and adventure.
- **Achievers:** Entrepreneurial networkers who focus on family and community life.
- **Socializers:** Sociability seekers who love entertainment, freedom and family values.

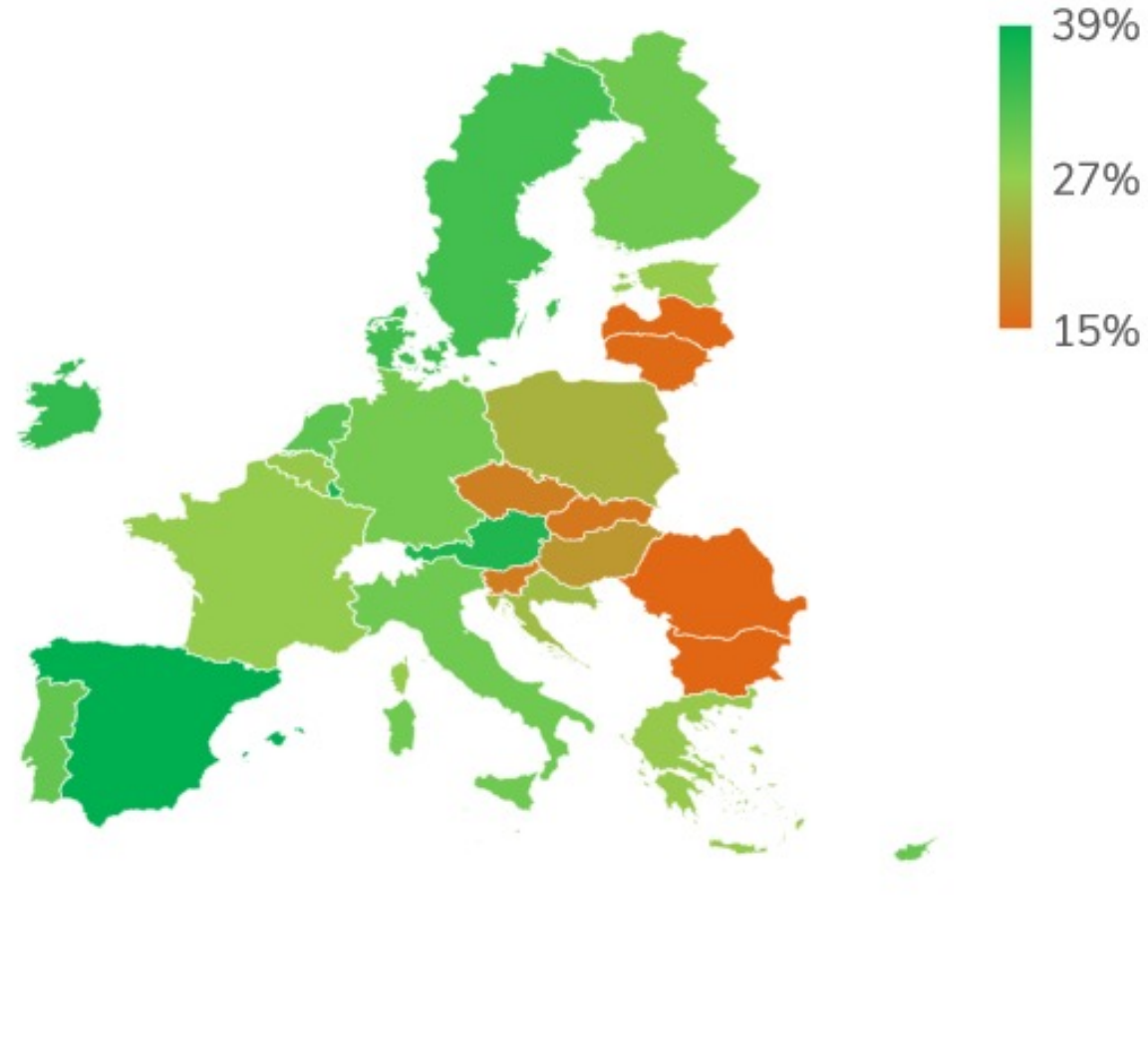
MIDDLE CLASS GEOGRAPHY MATTERS, TOO



Traditionalists

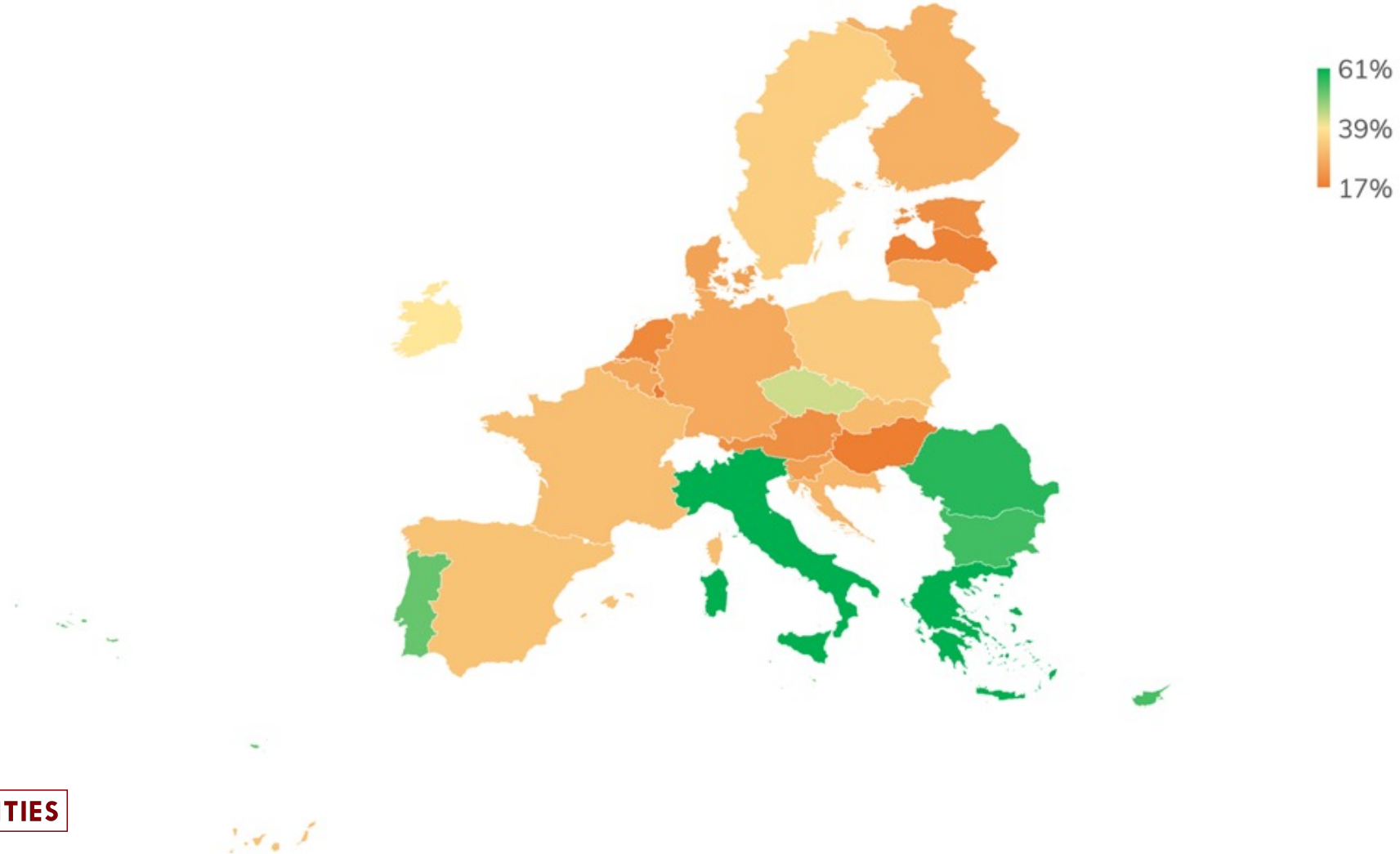


Creatives



THE NEED TO (RE)CONNECT WITH CITIZENS IS MORE URGENT THAN EVER

"I feel let down by society" (% agree + strongly agree)





| In summary

INSECURITY AND FEAR OF FALLING

- Broad insecurity and distrust overall and in European Middle Class: financial, political & geopolitical
- More than half of the European Middle Classes is just getting by financially. Cost of living crisis, war and inflation are perceived as major threats for the future.
- People expect that things will get worse in many policy areas, but also have faith that negative (economic) developments can be reversed

OPPORTUNITIES FOR ACTION BY BOTH EU AND CENTRE RIGHT

- EU is much more trusted than national governments and parliaments
- Solutions are expected from Civil society, EU and National governments
- Strong support for social market economy, rule of law & regulated immigration

| TAKE VALUES DIFFERENCES SERIOUSLY WHEN ADDRESSING CHALLENGES

- Growing distrust in Russia, while views are divided on how to proceed
- Broader context of war in Ukraine brings EU closer together, but connecting with citizens in South East Europe is pivotal
- Need for an inclusive narrative addressing European challenges on the basis of safety, stability, justice, freedom and cooperation

DISCUSSION

