

Navigating Uncertainty in an Exhausted Europe

A 6-country comparative study on the impacts of COVID
on trust, climate action, social cohesion, and our
uncertain future.



About More in Common



More in Common is an **international initiative** set up in 2017 to build societies that are stronger, more united, and more resilient to the increasing **threats of polarisation and social division**.

We work with a wide range of groups in civil society, politics, government, business, faith, education, philanthropy and the media to connect people across lines of division.

More in Common has teams in France, Germany, the United Kingdom and the United States as well as Poland and Spain.

For more information please visit
www.moreincommon.com or contact
us at contact@moreincommon.com

Methodology



Scope

France, Germany, Italy, Poland, Spain, United Kingdom

Sample Size

N=2,000 per country; margin of error +/- 2.1%; larger for subgroups. In some cases, numbers may not add up to 100% due to rounding.

Research Partner

YouGov

Fieldwork dates

France: 7-15 Dec, 2021
Germany: 7-17 Dec, 2021
Italy: 7-21 Dec, 2021
Poland: 6-17 Dec, 2021
Spain: 7-12 Dec, 2021
UK: 19 Nov - 1 Dec, 2021

Fieldwork Method

Online survey using representative demographic and political quotas

Key Details

Surveys are a mix of common and tailored, nationally specific questions. Comparisons are drawn to a precursor project completed in June 2020.

Key Findings 1/2



1) The long pandemic has left people feeling **pessimistic, uncertain and distrustful**. Social trust indicators have dropped since June 2020, many doubt that governments and the media are telling them **the truth about COVID**, and large numbers say the pandemic has hurt their confidence in our ability to tackle future challenges. We will now be tracking whether the united efforts to protect Ukrainians change these larger social dynamics.

2) Despite the urgency of other issues, respondents still believe **tackling climate change** should remain high on the agenda. In all six countries, the public feels not enough is being done to protect the environment. At the same time, an **atmosphere of distrust** in media and low confidence in government risks undermining efforts at consensus-building around climate change mitigation.

3) COVID-19 has not led to a significant clash between generations. There is a strong sense across all ages that **governments should be doing more for young people**. A **common agenda** to create jobs, fight unemployment, tackle climate change and support health care resonates across generations.

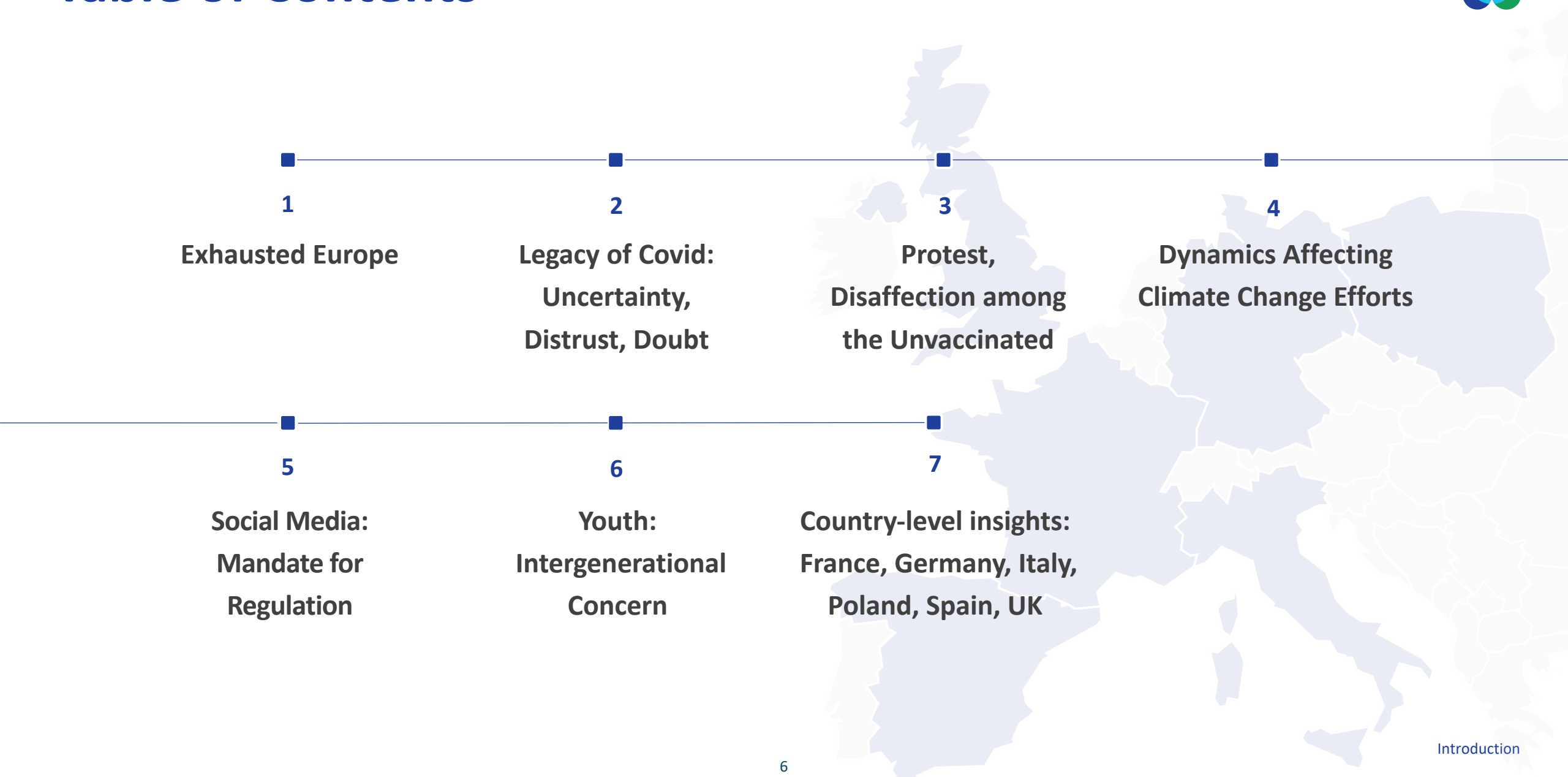
Key Findings 2/2



4) Being **unvaccinated** has become an important **identity marker and a dividing line** within societies. The decision not to be vaccinated reflects broader distrust toward society as much as it reflects views about vaccines. Unvaccinated people may be particularly **vulnerable targets for disinformation**.

5) People are looking for a reset in their **relationship with social media**. They are concerned about the negative impact of social media in spreading hate speech, misinformation, and fraud. In many countries, majorities want **stronger regulation** of social media, with younger people especially concerned about its **effect on mental health**.

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1. Exhausted Europe

Above all, the pandemic has left Europeans feeling divided

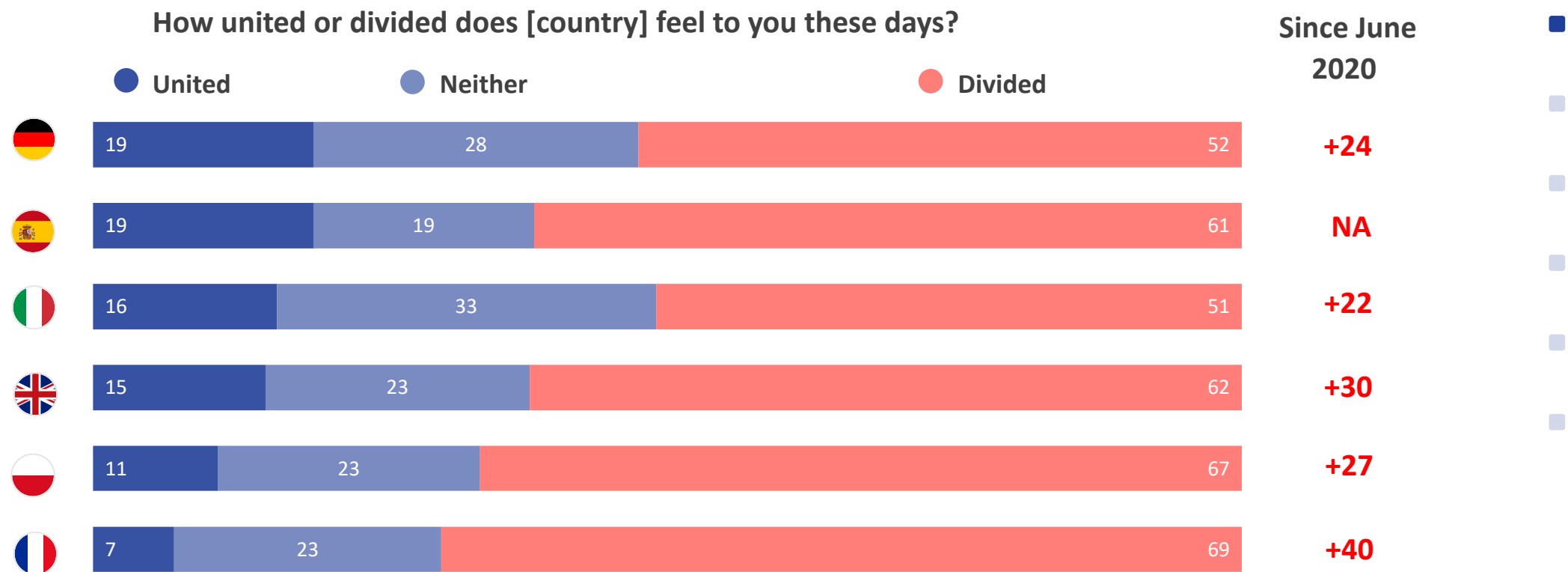


Description	France	Germany	Italy	Poland	Spain	UK
Top 3	Divided (52%)	Divided (45%)	Corrupt (44%)	Divided (55%)	Divided (45%)	Divided (55%)
	Chaotic (30%)	Bureaucratic (42%)	Divided (35%)	Intolerant (41%)	Corrupt (40%)	Intolerant (32%)
	Corrupt (30%)	Democratic (23%)	Chaotic (24%)	Corrupt (32%)	Intolerant (26%)	Chaotic (32%)
Bottom 3	Orderly (2%)	Just (5%)	Honest (3%)	Compassionate (3%)	Compassionate (4%)	United (1%)
	Patriotic (2%)	Independent (3%)	Educated (2%)	Respected (3%)	United (4%)	Christian (1%)
	United (2%)	Patriotic (3%)	Fair (1%)	Orderly (3%)	Orderly (3%)	Green (1%)

Thinking about the COUNTRY today, what qualities would you use to describe it? Please select up to four. Respondents were shown 22-24 choices, with descriptions tailored to each country, with an equal mix of positive and negative.

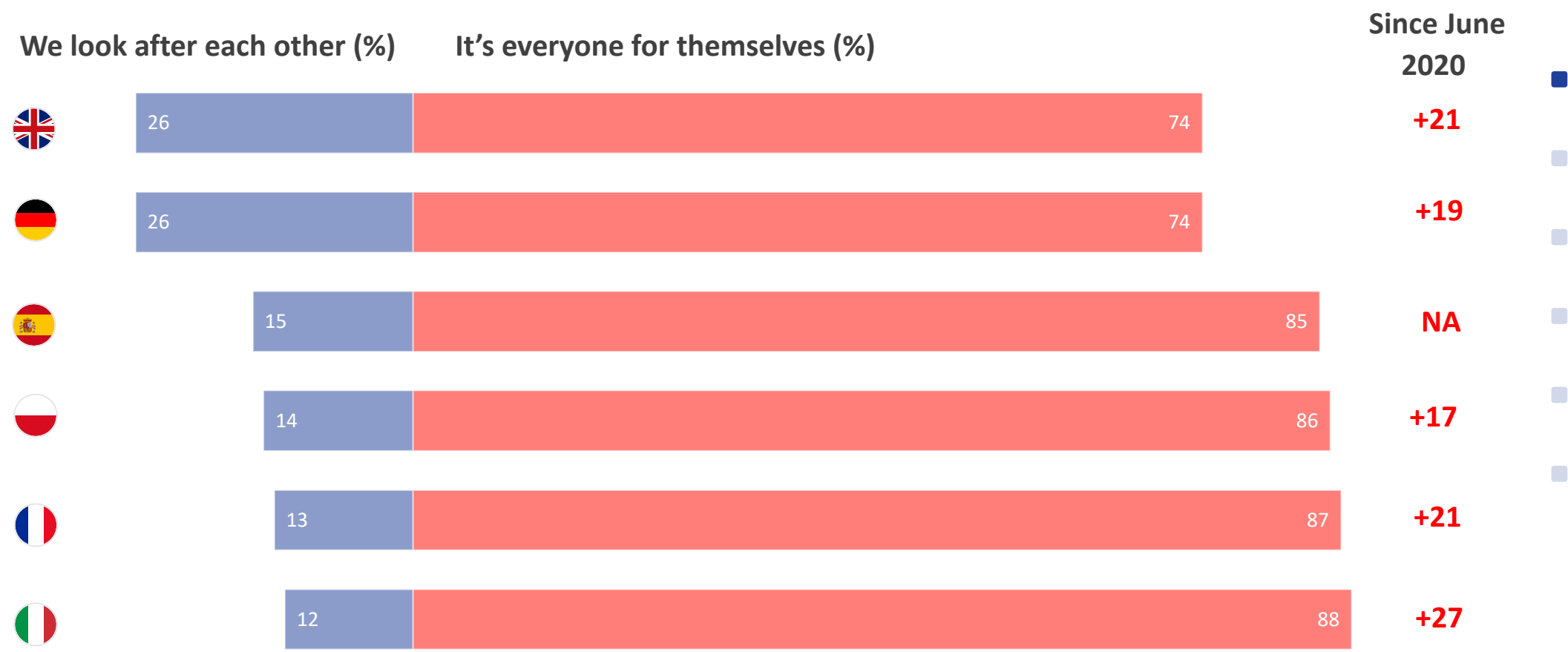
Exhausted Europe

Interventions need to tap into the zeitgeist of Europeans wanting a more united society



How united or divided does [COUNTRY] feel to you these days?
Categories sum: very + somewhat united; neither united nor divided; very + somewhat divided.

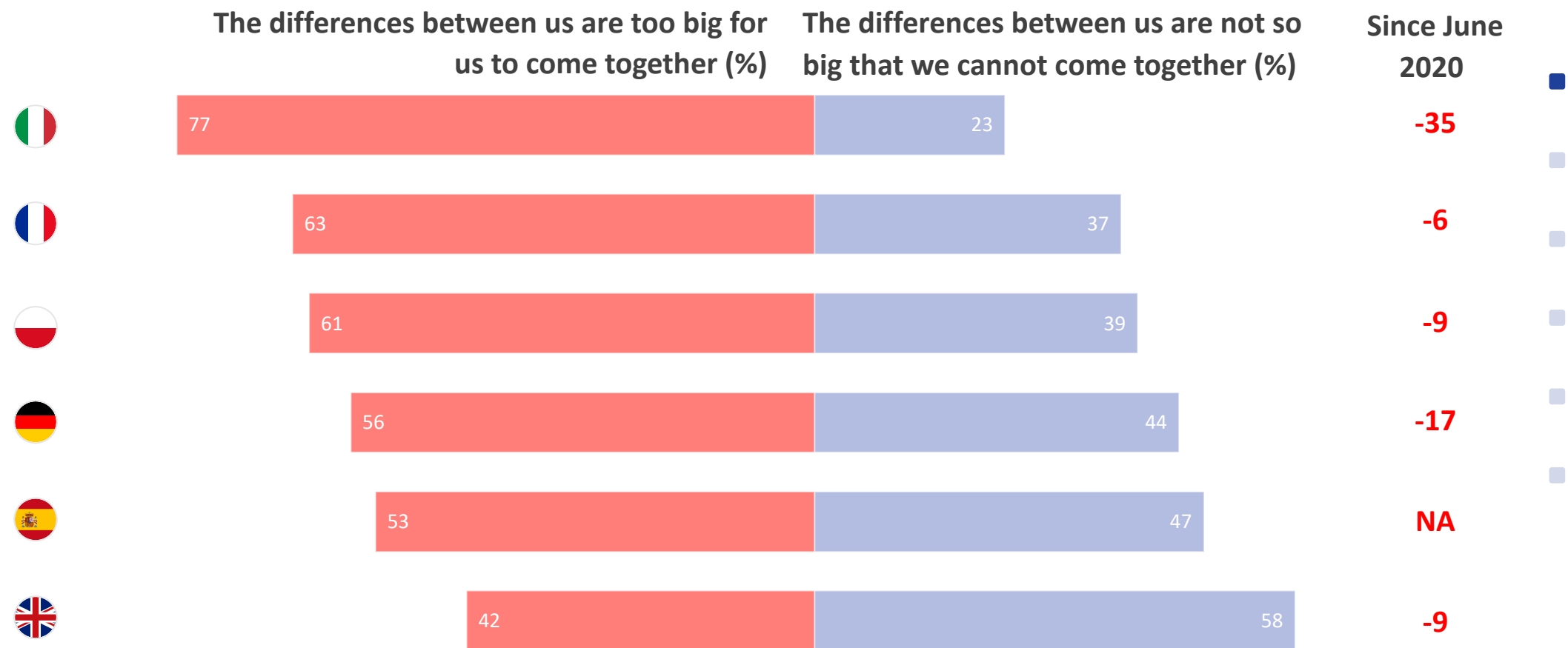
Recovery measures that strengthen solidarity will be most successful



When thinking about life in [COUNTRY] today, which do you agree with more?

Exhausted Europe

COVID has particularly eroded social cohesion since mid-2020



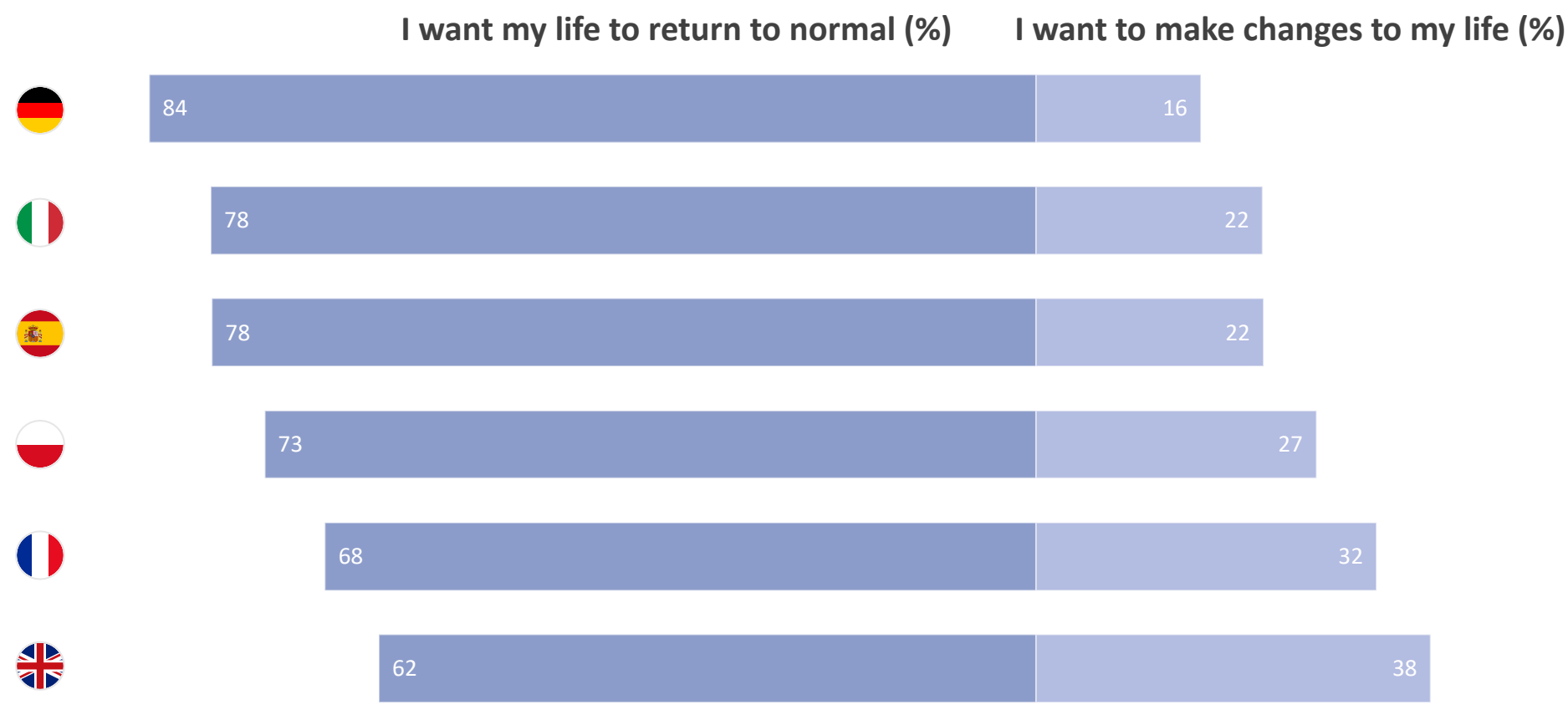
Which of the following statements do you agree with more?

Exhausted Europe

Personal fatigue is driving a desire for life to return to normal

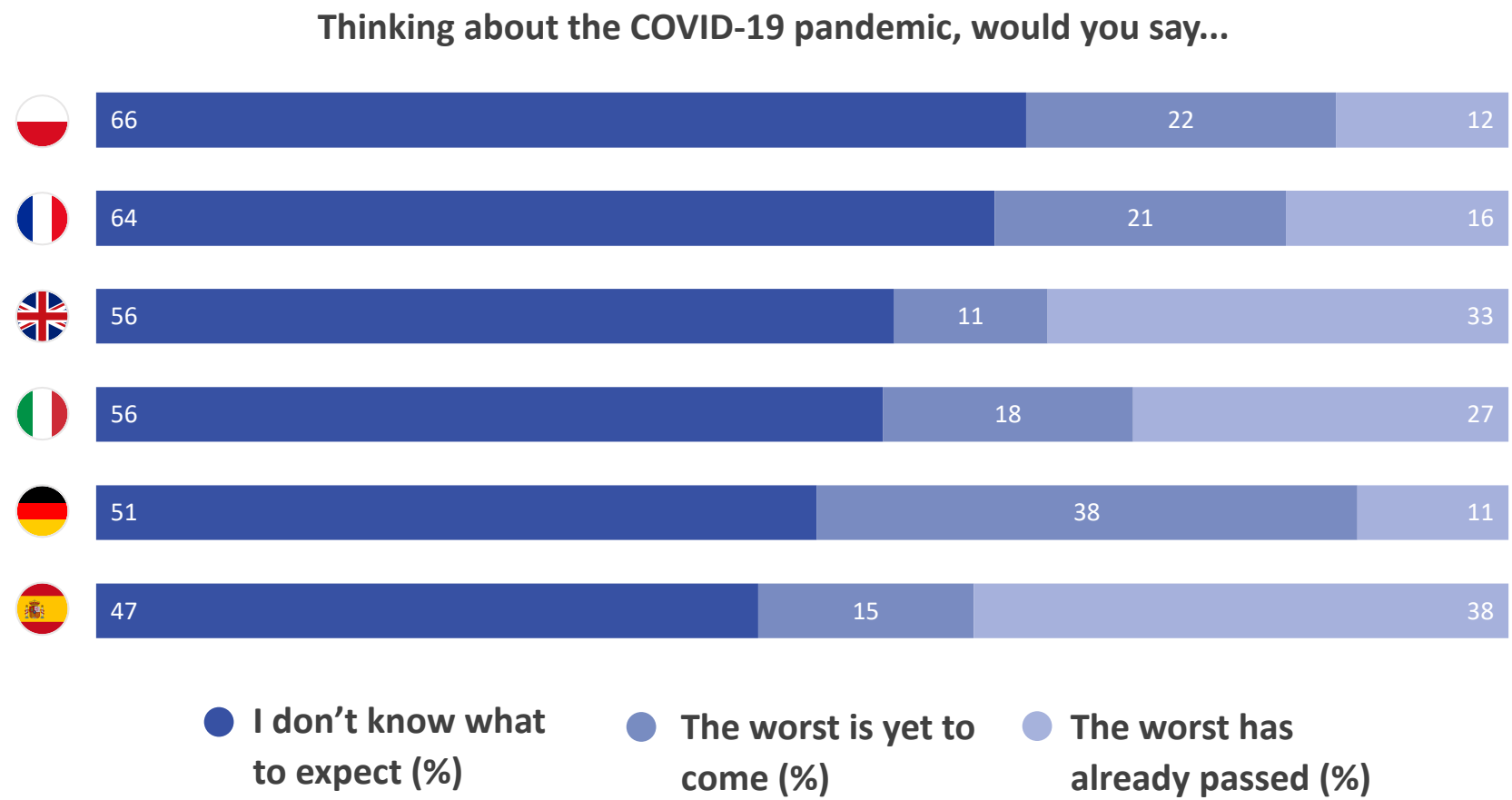


When we emerge from the pandemic, which better describes what you want for your life...?

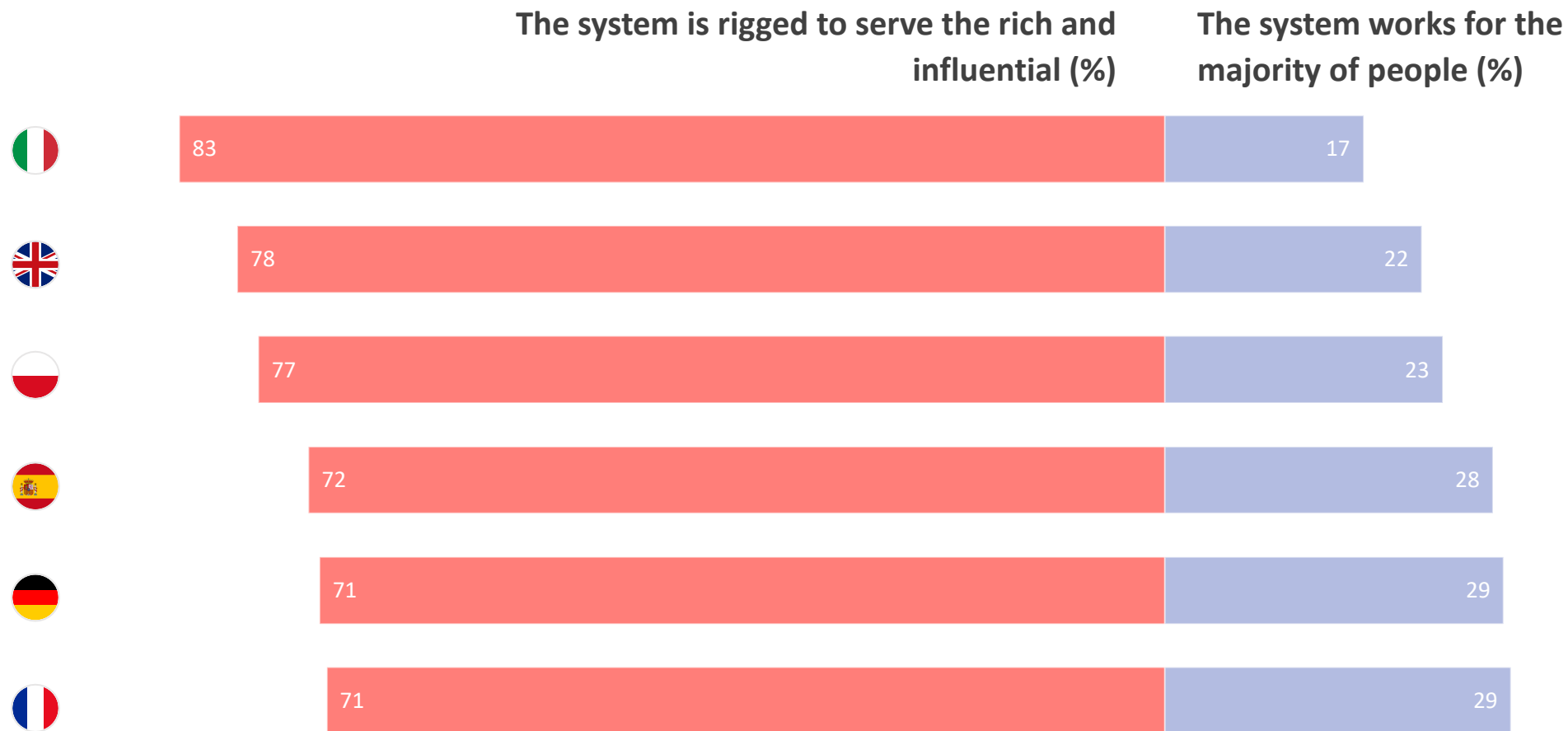


2. Legacy of COVID: Uncertainty, Distrust and Doubt

Most are unsure about what to expect next - and many have given up trying to know

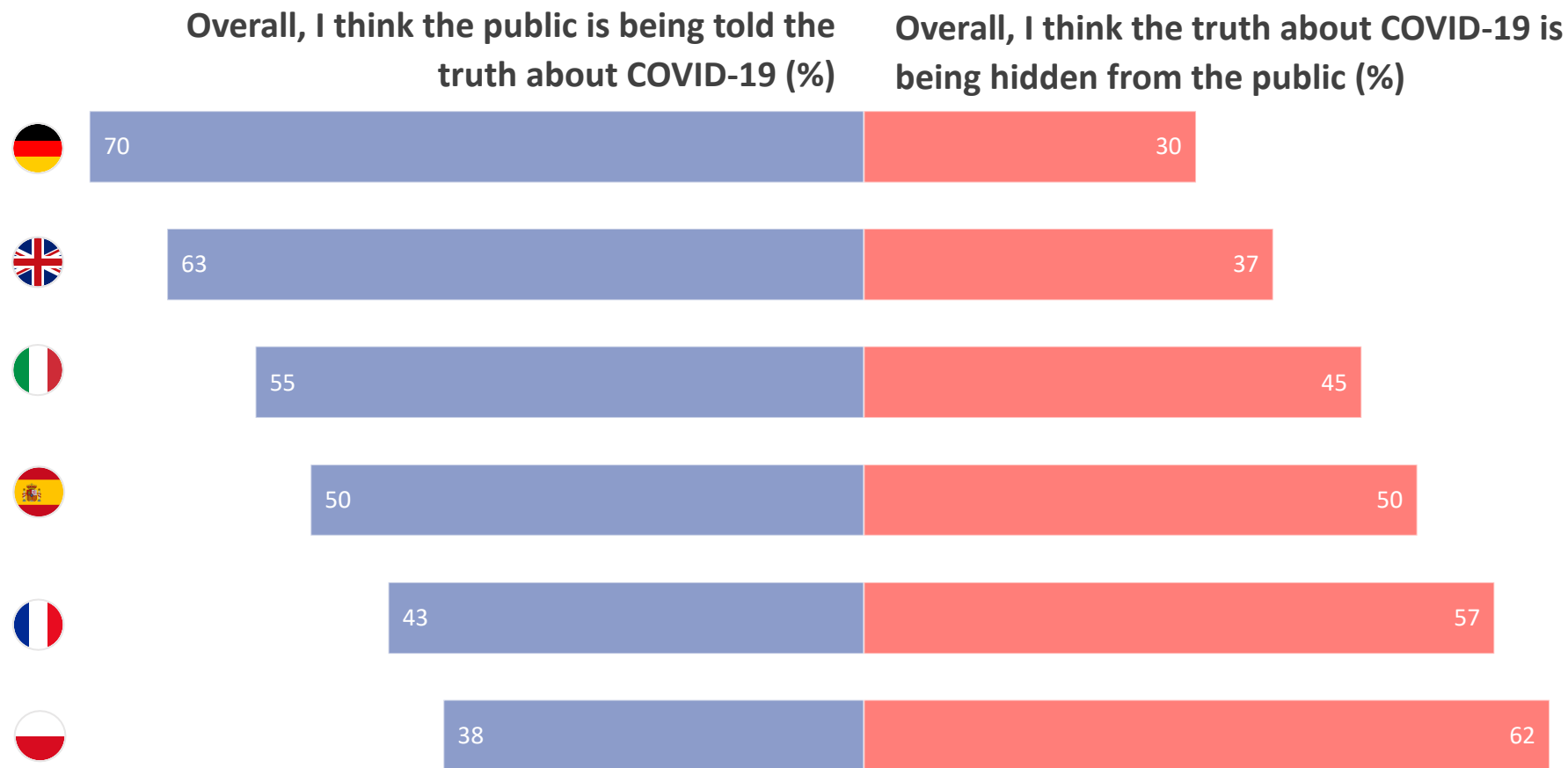


3 in 4 say the 'system is rigged' - a feeling that goes far beyond protest groups



Which do you agree with more? In [COUNTRY]...
Categories sum-- Left statement: 1+2 on scale; Right statement: 3+4 on scale.

COVID has left large numbers distrustful and feeling lied to

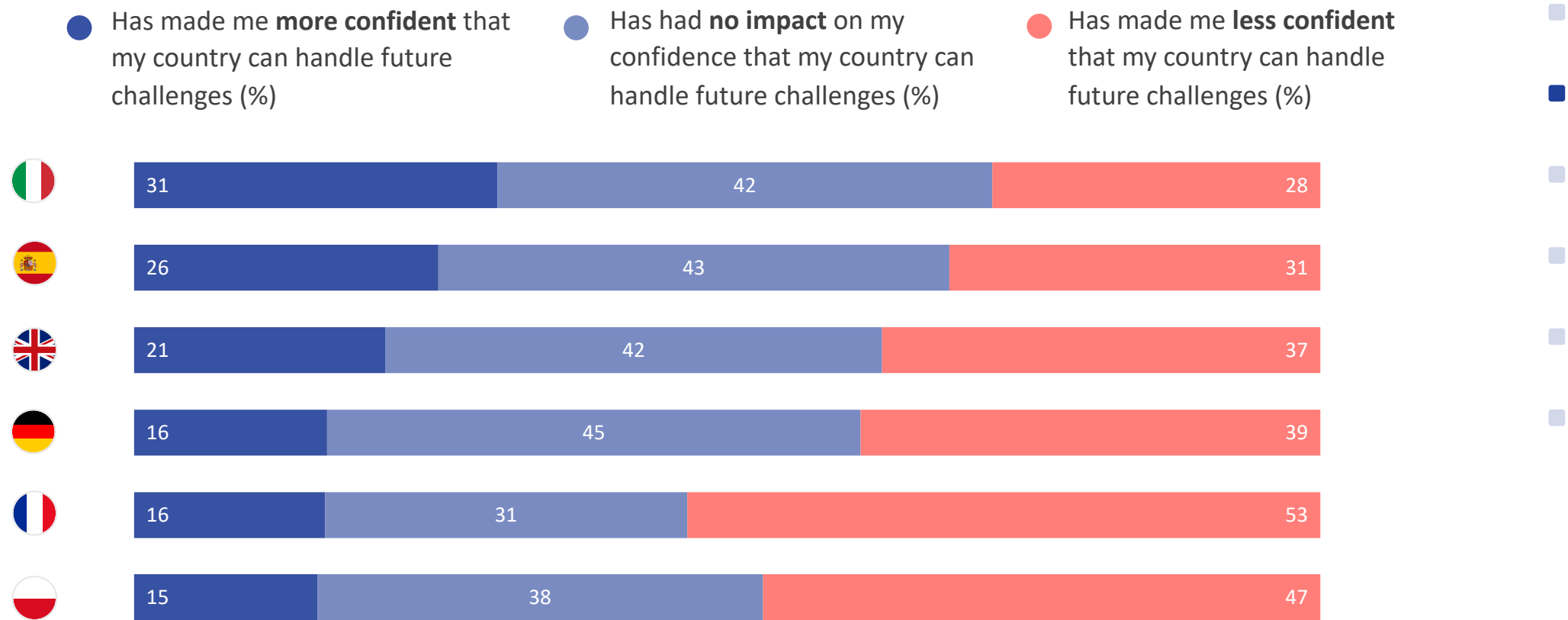


Which of the following do you agree with more?
Categories sum-- Left statement: 1+2 on scale; Right statement: 3+4 on scale.

COVID has eroded confidence in our ability to overcome future challenges like climate change



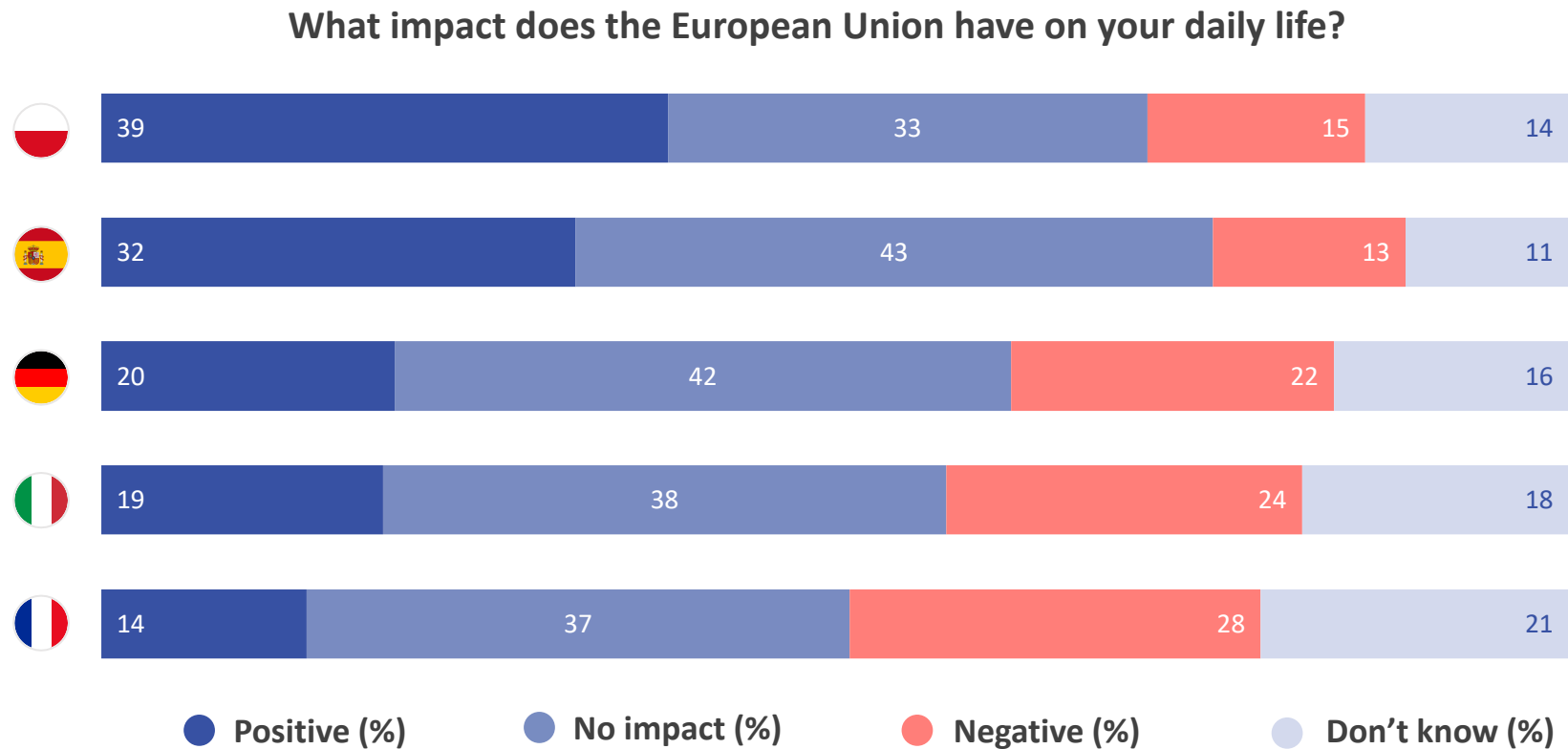
The COVID-19 pandemic...



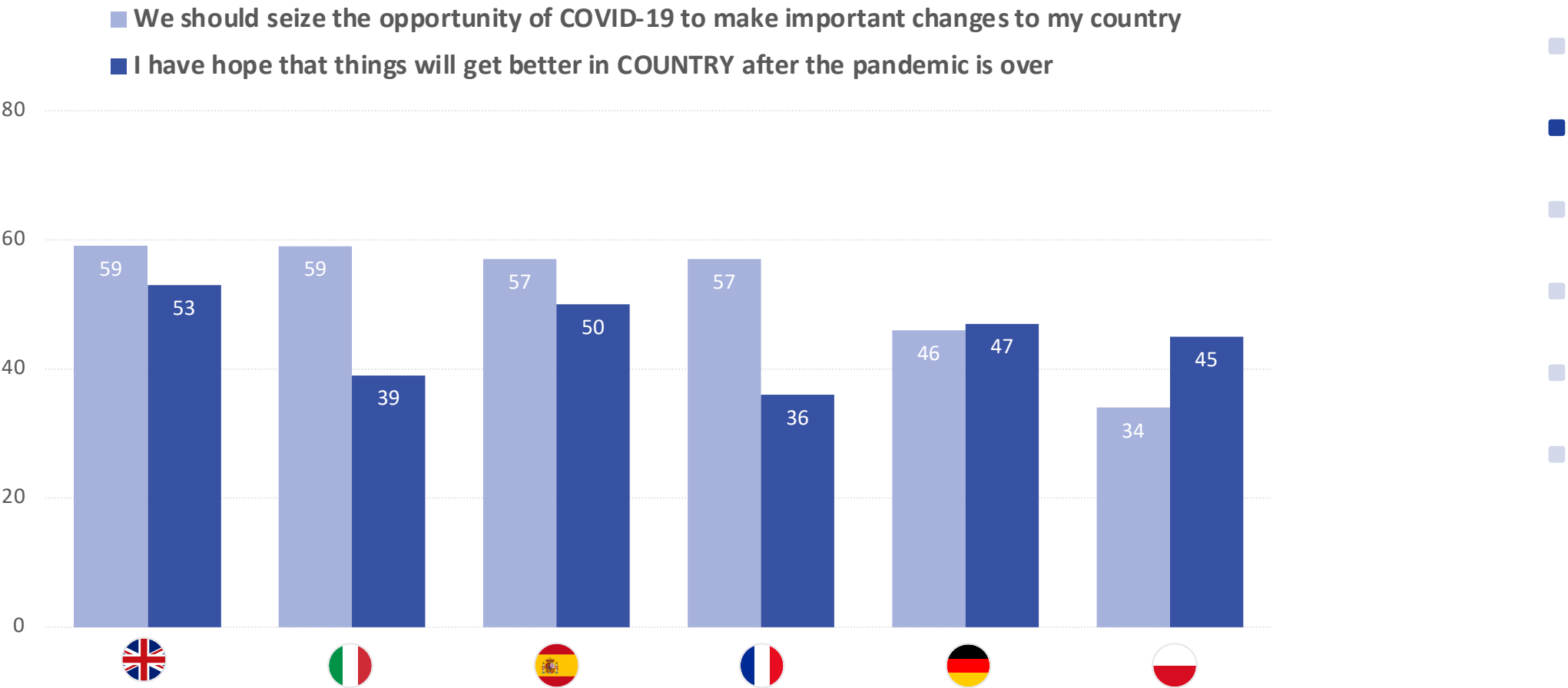
Which of the following statements do you agree with the most? The COVID-19 pandemic...

Uncertainty, Distrust, Doubt

At least 1 in 3 don't see an impact of the EU in their daily life

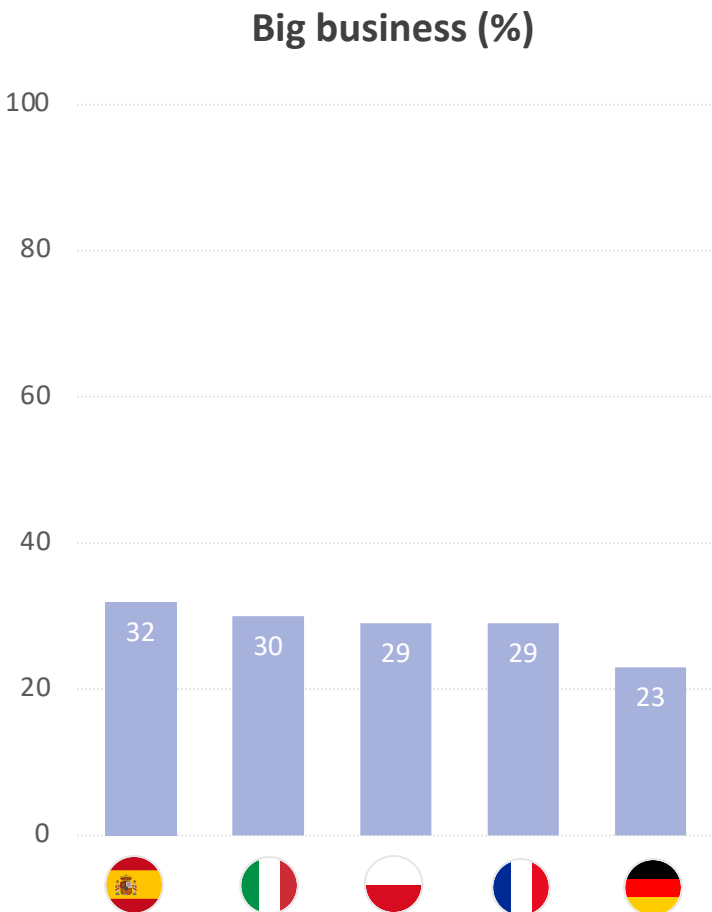
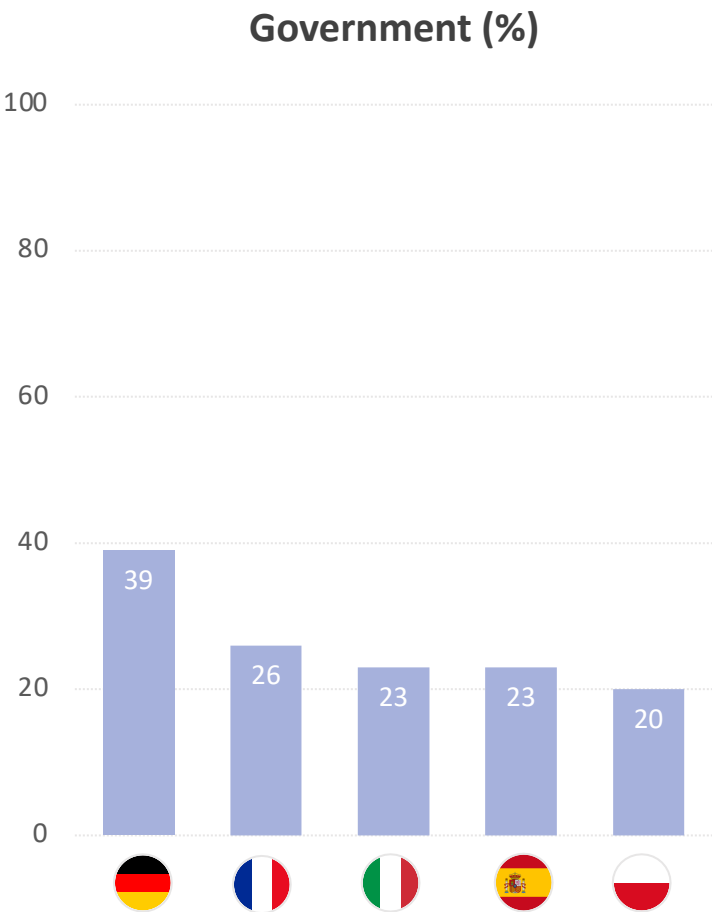


Although people want their life to return to normal, they still aspire to social change – but few trust the system will deliver



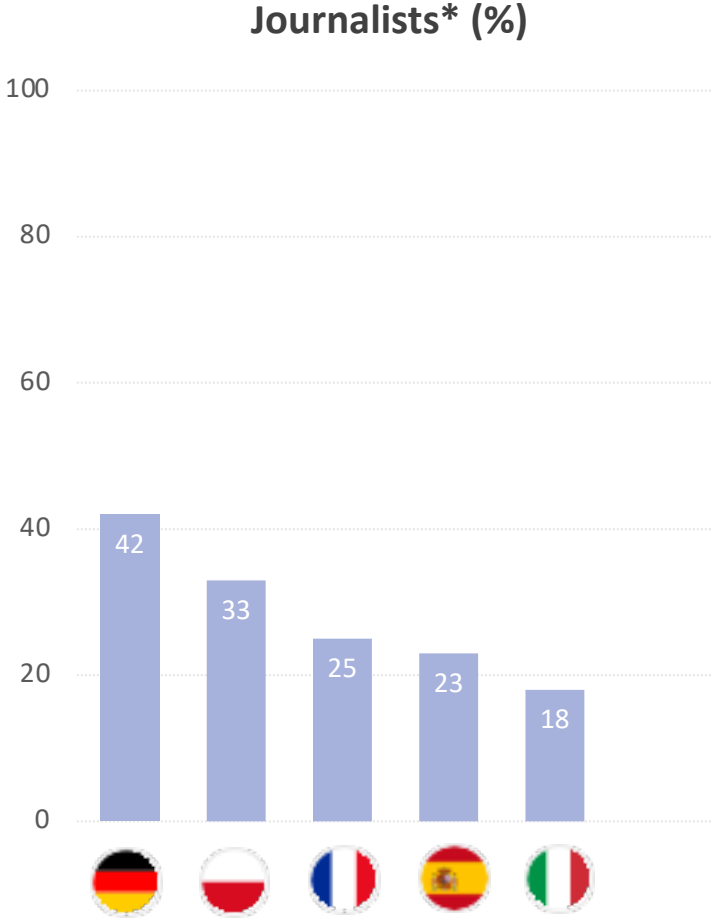
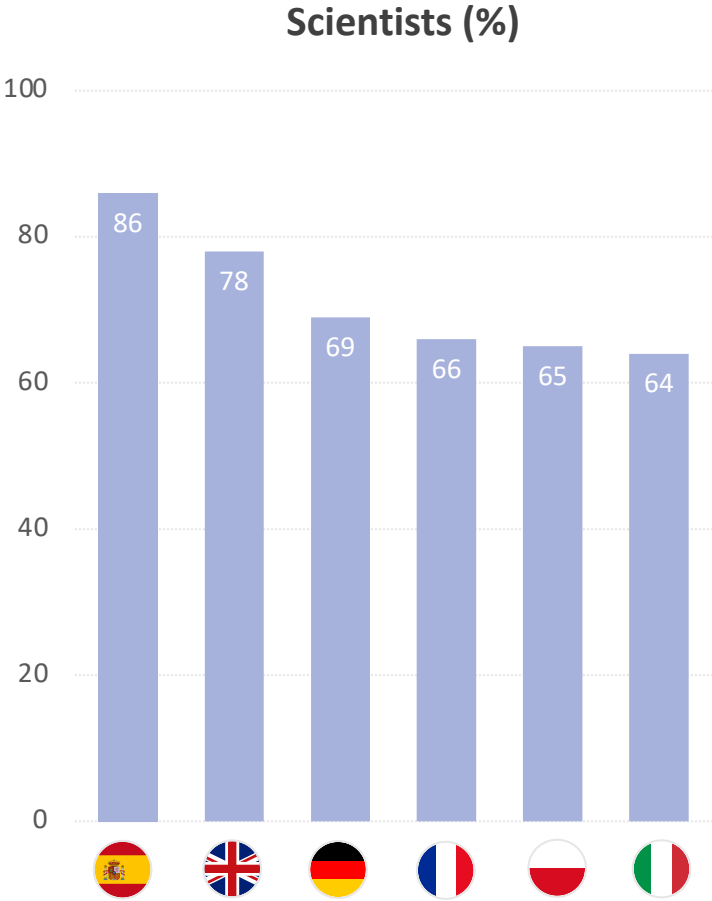
1. Which of the following statements do you agree with more? I mostly just want things in COUNTRY to return to how they were before the pandemic v. We should seize the opportunity of COVID-19 to make important changes to COUNTRY; 2. Which of the following statements do you agree with more? I doubt that things will get better in COUNTRY after the pandemic is over v. I have hope that things will get better in COUNTRY after the pandemic is over

Trust in our societies' key institutions are weak – with little difference between the public and private sectors



How much trust do you have in the following? * Exact terminology varies slightly by country.
Showing sum of 'A great deal' + 'Quite a lot'.

While scientists are still trusted, very few trust the media



How much trust do you have in the following? * Exact terminology varies slightly by country.
Showing sum of 'A great deal' + 'Quite a lot'.

3. Protest and Disaffection among the Unvaccinated









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COVID-19 has opened a new fault line opposing the Vaxxed and the Unvaxxed



In what ways is our society most divided today? Select up to three.

						
Between rich and poor	50	55	58	42	47	48
Between vaccinated and unvaccinated	43	62	52	37	*	32
Between left and right	20	28	17	47	60	19
Between immigrants and people born in [COUNTRY]	38	29	23	*	27	19
Between young and old	9	11	14	19	6	10

*Not asked in this country.

The unvaccinated indicate higher levels of alienation



They show a sense of cynicism and ostracisation. For instance, they are more likely to say:

- “You **can’t be too careful** with most people” (70% vs. 59%)
- The **country is “rigged** to serve the rich and influential” (83% vs. 74%)
- That they are “**more of a loser**” of changes in society (35% vs. 27%)

On climate change beliefs, they show much more scepticism:

- Almost three times as likely to say they are **not worried about climate change** (43% vs. 16%)
- Twice as likely to think climate change is part of the earth's natural cycle and “**human action is not to blame**” (40% vs 18%)
- Twice as likely to believe that government policies to **protect the environment will “make their lives worse”** (32% vs 16%)

Politically, they are much more likely to lean towards right-wing parties. For instance, they are more likely:

- In Germany to be **AfD** voters (27% vs. 5%)
- In Poland to be **Confederation** voters (17% vs. 5%)
- In Spain, to be **Vox** voters (39% vs. 20%)

They are less likely to participate in environmentally-conscious behaviours, such as deciding to:

- **Recycle and reduce** plastic use (46% vs. 71%)
- Buy **local foods** and cut down on food waste (37% vs. 50%)
- Choose **environmentally-friendly brands** over unsustainable brands (20% vs. 28%)
- **Reduce electricity** use by, for example, using lower-energy products (40% vs. 54%)
- Walk, cycle and use public transport **instead of driving** (36% vs. 46%)

4. Dynamics affecting Climate Change Efforts









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The economy and COVID-19 are the top concerns, but climate change remains on the agenda



In your opinion, which are the most IMPORTANT issues facing the country today? Select the top 3.







Priority
based on %
selected

						
1st	Poverty and inequality	COVID-19	Economy and unemployment	Rising cost of living/ inflation	Work and Unemployment	COVID-19
2nd	COVID-19	Climate change and the environment	Health	COVID-19	COVID-19	Supporting the NHS
3rd	Immigration and refugees	Housing	COVID-19	Border crisis (Now obsolete)	Rising energy prices	Cost of living
4th	Crime and security	Improve old-age provision	Taxes	Healthcare	Healthcare	Climate change and the environment
5th	Economy and unemployment	Healthcare	Immigration	EU Relations	Poverty and inequality	Asylum seekers crossing the channel
6th	Climate change and the environment (tied 5th)	Immigration and refugees	Climate change and the environment	Women's Rights	Political corruption	Brexit

When people think of a better future, a key element is restoring the balance with the natural environment



Thinking about 10 years into the future, imagine your ideal [COUNTRY] society. What should it be like?

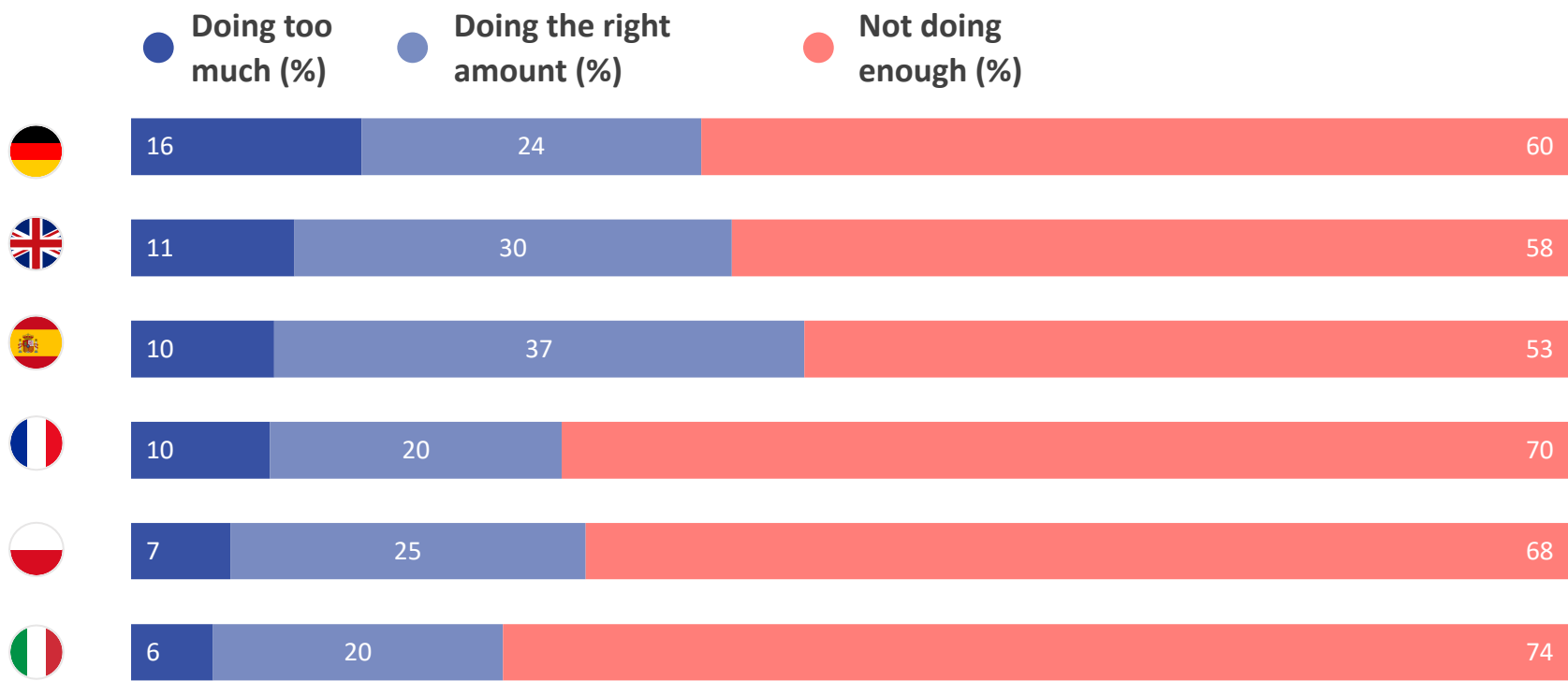
						
1	Respectful of environment	Democratic	Respectful of environment	Honest	Hard working	Honest
2	Human	Environmentally friendly	Honest	Fair	Solidarity	Fair
3	Educated	Just	Educated	United	Respectful of environment	Compassionate
4	Hard working	Responsible	European	Tolerant	Tolerant	Tolerant
5	Honest	Secure	Democratic	Lawful	Educated	Hard-working
6	Tolerant	Cosmopolitan	Tolerant	Ecological	United	Democratic
7	Just	European	Fair	Educated	Just	Green

Thinking about 10 years into the future, imagine your ideal [COUNTRY] society. What should it be like? Please select up to four qualities.

Majorities everywhere still think more government action is needed on the environment

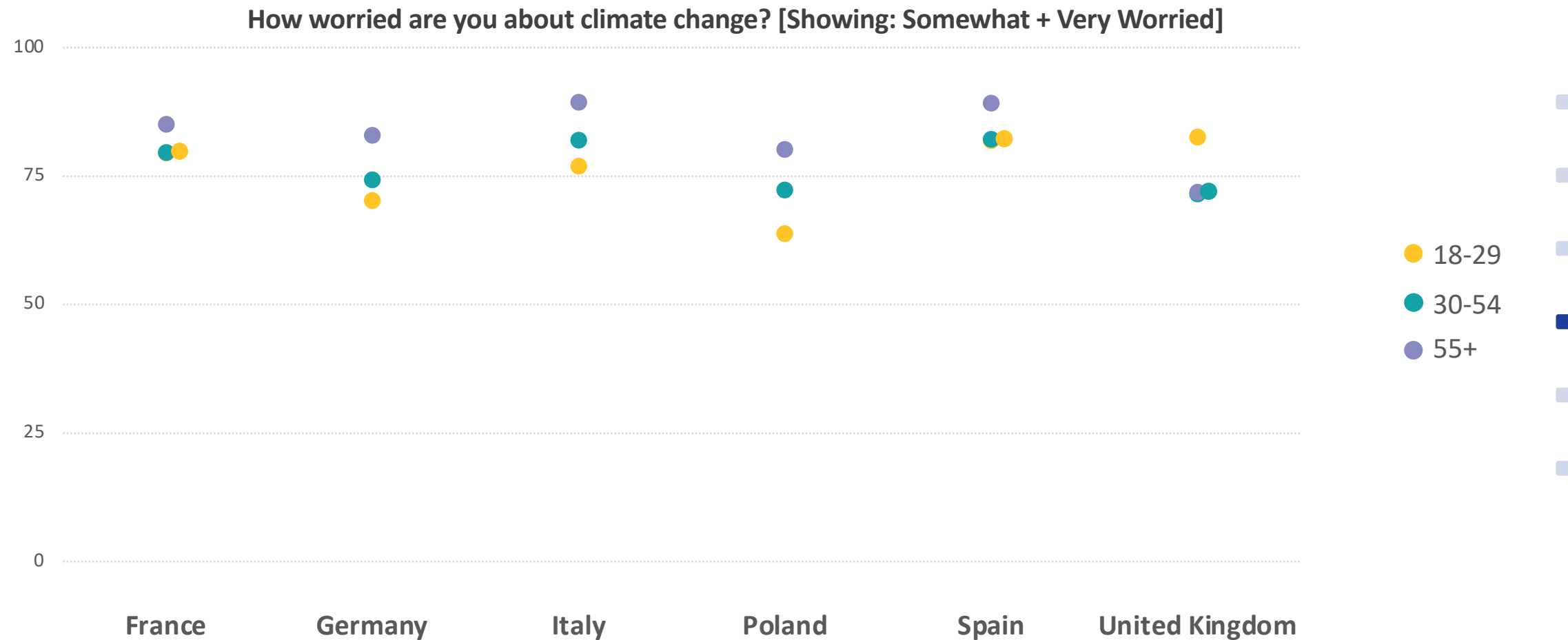


On the issue of the environment would you say that the government is...?



On the issue of the environment would you say that the government is...?
Categories sum: Doing far too much + Doing too much; Doing the right amount; Not doing enough + Not doing nearly enough.

Concern about climate change is shared across generations

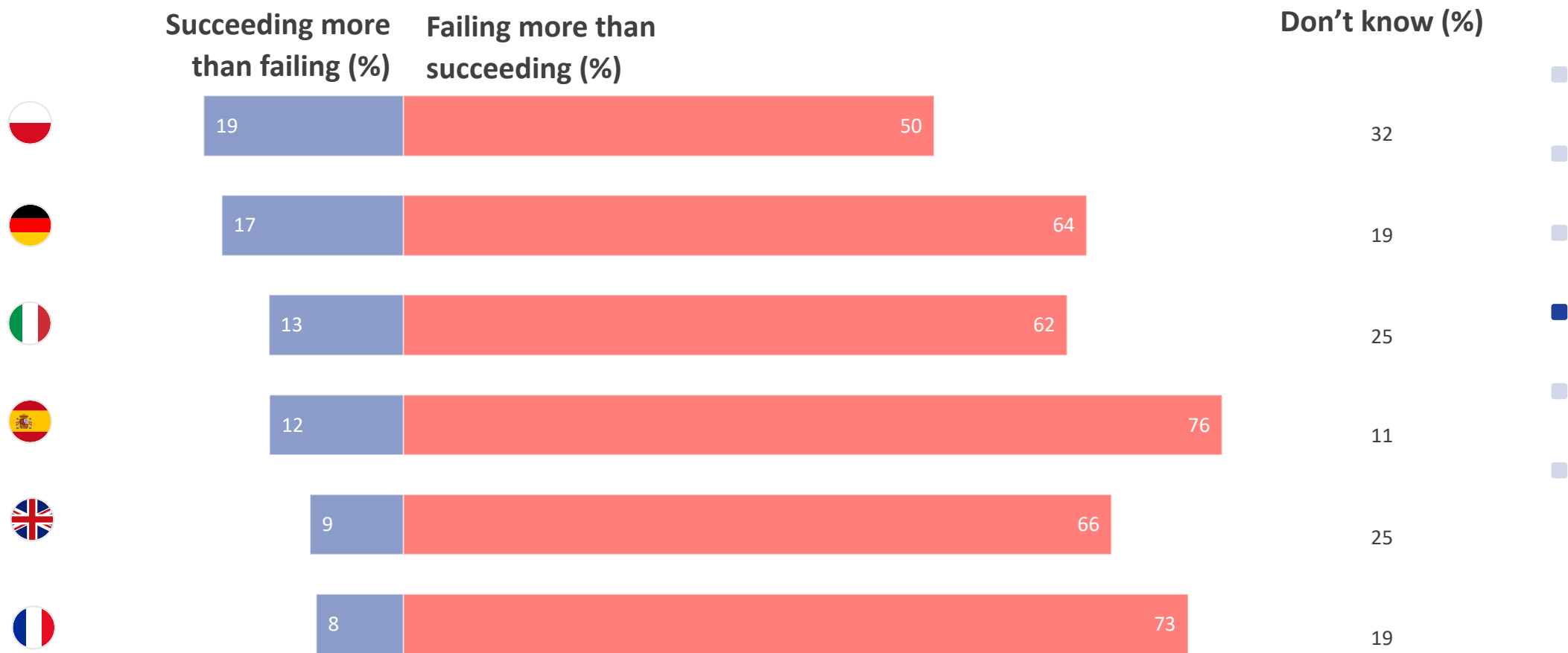


How worried are you about climate change? Showing sum of Very + Somewhat worried.

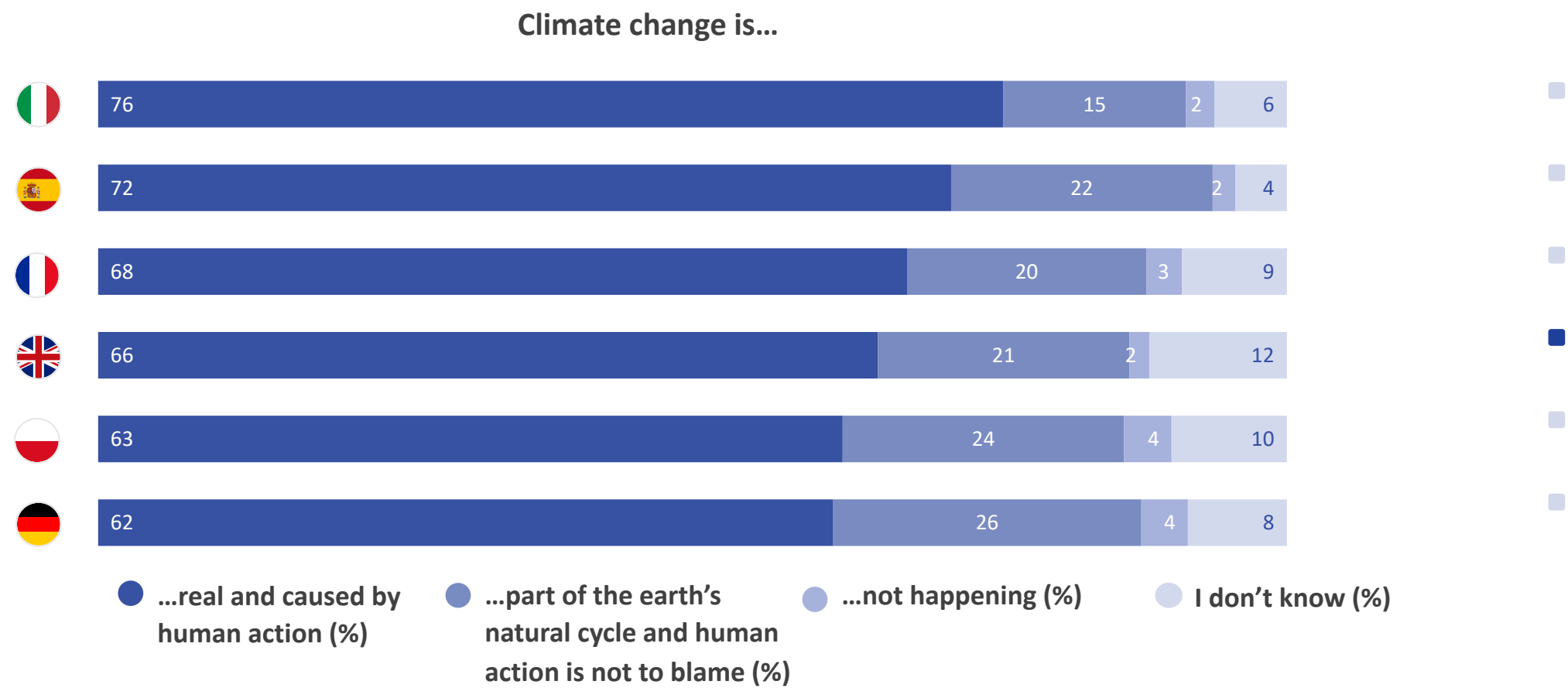
Post COP: low confidence in global efforts to tackle climate



Would you say that international efforts to address climate change are...?



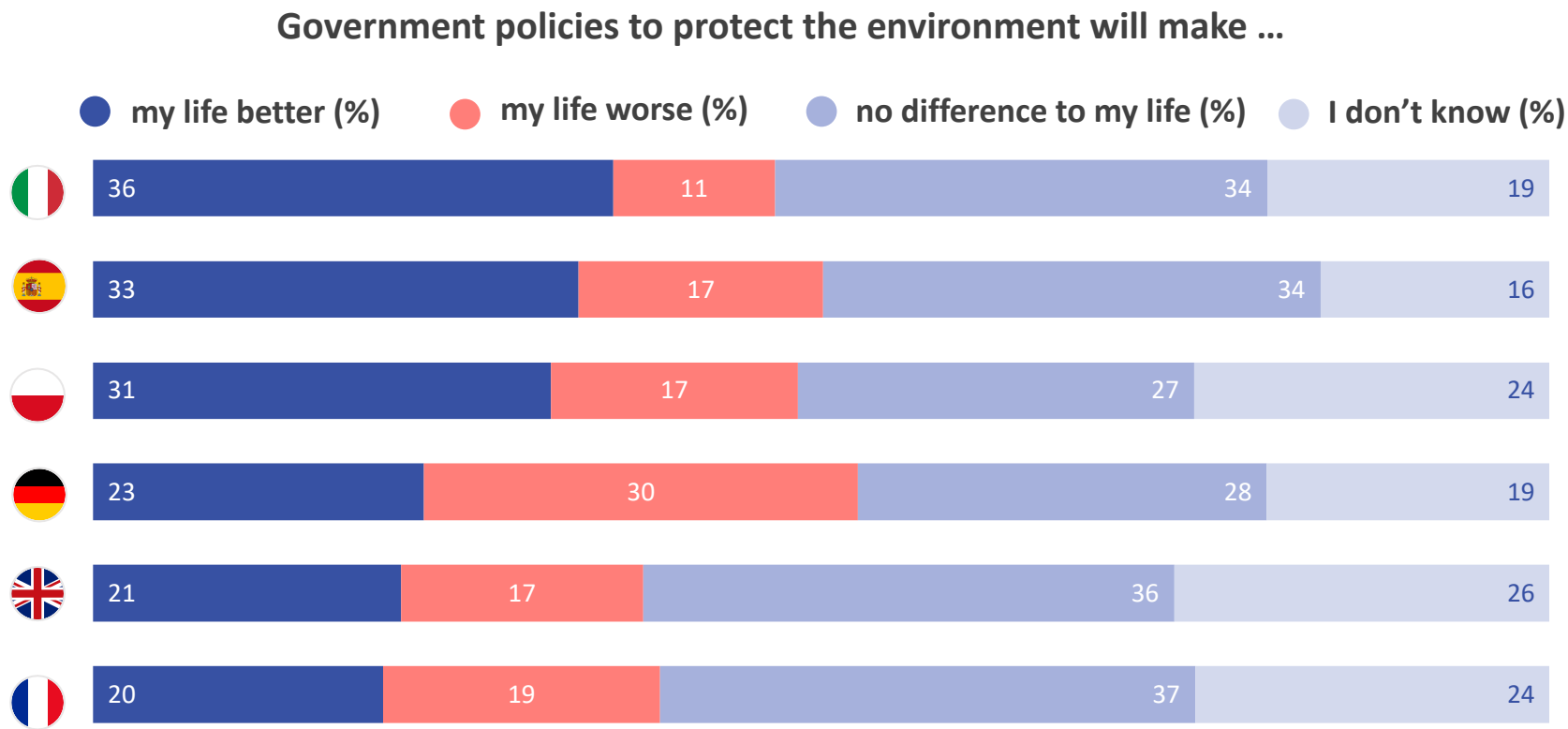
A surprising 1 in 5 still doubt the causes of climate change – and this is unlikely to change in a context of distrust



Which of the following statements do you agree with more?

Dynamics affecting Climate Change Efforts

Many don't see the impact of government action on climate



In general, what effect do you think government policies to protect the environment will have on your life?

5. Social Media: Mandate for Regulation

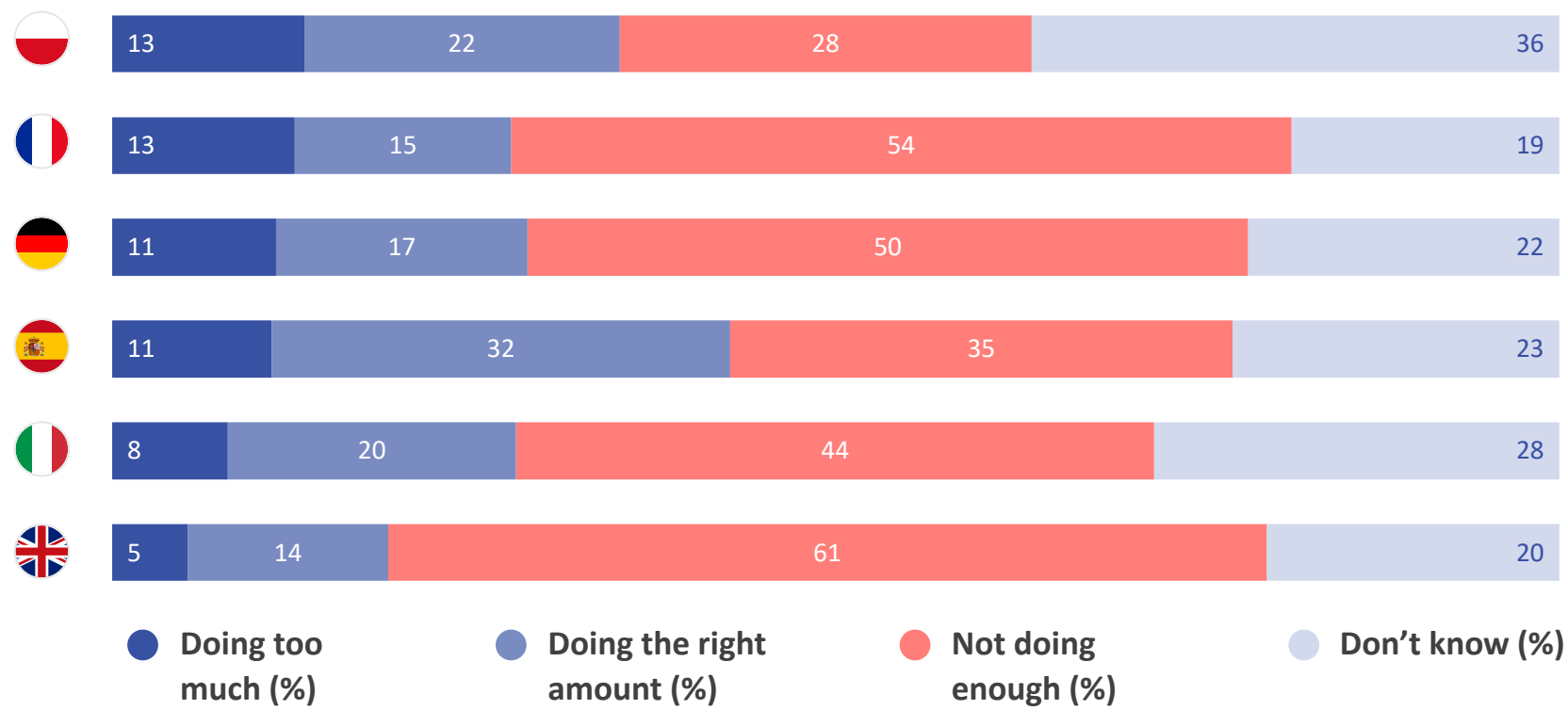


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There is widespread support for regulation of social media









What is your view of the regulation of social media platforms, like Facebook, TikTok and YouTube? Is the government...?



Hate speech, scams, and fake news are the most common concerns

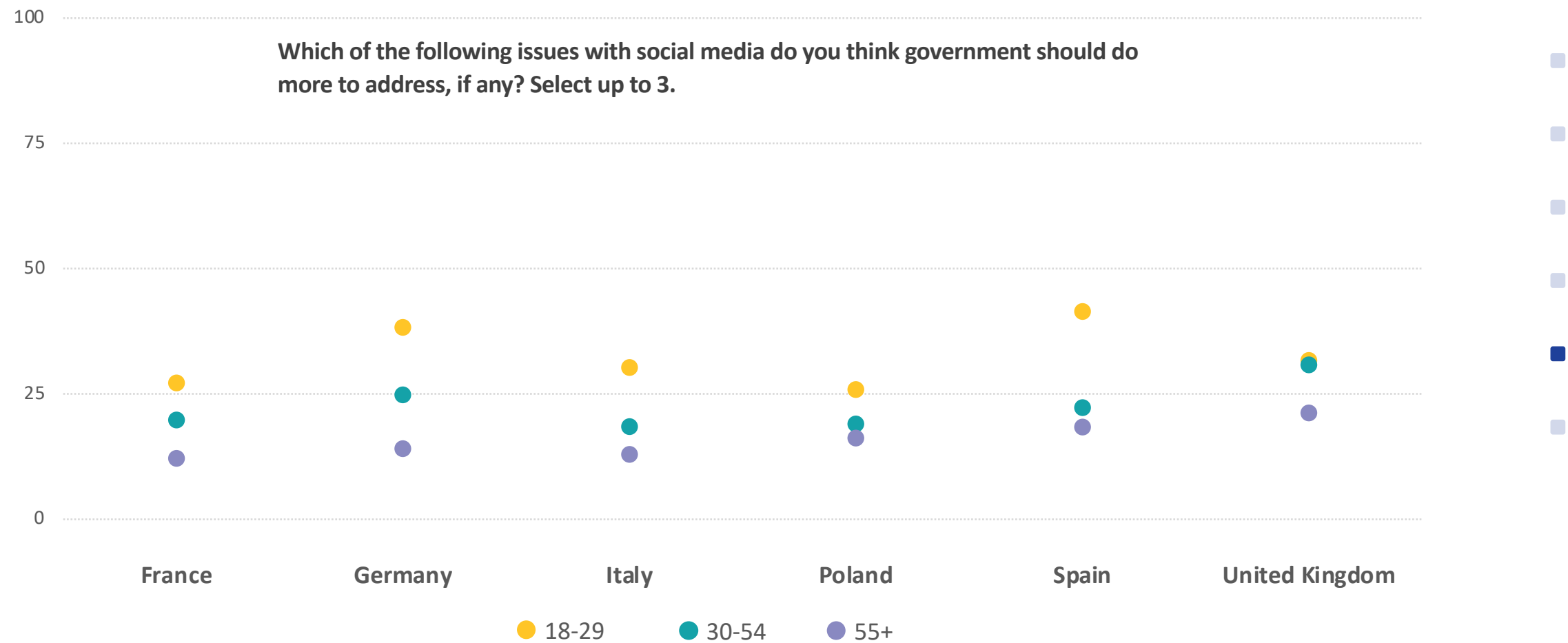


						
Hate speech or violence	60	56	47	48	47	51
Scams and fraudulent activity	48	49	51	48	53	57
Misinformation or fake news	49	47	52	41	46	53
Impacts on children and young people	52	36	34	30	36	39
Loss of privacy	27	23	25	26	28	19
Mental health impacts	18	22	18	20	24	27
Don't know	5	7	8	11	5	8
None of the above	1	3	2	4	3	2
Other	1	0	1	1	1	1

Which of the following issues with social media do you think government should do more to address, if any? Select up to 3.

Social Media: Mandate for Regulation

Young people are more likely to prioritize the mental health impacts of social media



Which of the following issues with social media do you think government should do more to address, if any? Select up to 3.



6. Youth: Intergenerational Concerns



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While priorities differ slightly among generations, a common agenda spans old and young



On many key issues, young and old agree:

- **Climate change** is a priority, regardless of generation—though slightly higher in Germany and slightly lower in Spain and the UK among the older population.
- **The economy and unemployment** concerns are top of mind for young and old alike.
- **Poverty and inequality** are seen as priorities across generations, with a rising cost of living often disproportionately concerning the young.
- **Healthcare** is of nearly equivalent importance across age groups, with some higher prioritization among older population in Poland.
- **COVID** ranks among the **top 3 issues everywhere** and despite the concentrated risk to the elderly population, **differences in concern between young and old are relatively small**, less than 8 pp. in 5 of 6 countries. The exception is in Germany, where those 55+ cite COVID as a priority at the highest rate of any age cohort in the study.

Younger Europeans express more concern about advancing equality for minority groups.







- In Poland, **women's rights** are a priority for 36% of the young, compared to 16% of older Poles; gender equality is much higher in Spain as a priority - 10% among young vs. 2% among older generations.
- Addressing **racism** is of greater concern to younger people, e.g. in France, it's a priority for 21% of young, versus 6% of older people.
- Similarly, **LGBT** issues are a top issue for 18% of young in Spain, compared to 2% of older people. Similar trends in Italy, Poland.

While older Europeans are often more concerned about immigration, crime and safety. Compared to those under 30, those over 55 years old:

- Are more concerned about **immigration**: 26 pp. higher in France, 12 pp. higher in Italy, and 37 pp. higher in the UK.
- **Prioritise safety**: crime and security concerns are 20 pp. higher in France, rule of law is 15 pp. higher in Poland, and citizen security is 8 pp. higher in Spain.

Interventions to help the young span areas of policymaking, with southern European countries focused most on job opportunities



						
Lack of job opportunities	35	25	60	27	59	36
Education	42	47	32	25	34	31
Housing	36	36	10	41	38	39
Mental health	18	35	23	38	27	47
Financial difficulties	39	22	33	38	36	23
Quality of jobs	24	17	35	29	44	22
Issues related to social media and internet use (addiction, privacy, bullying)	31	25	22	17	18	28
Difficulties relating to their social life	20	22	20	14	8	7
Physical health	12	19	15	21	8	14
Don't know	6	7	8	8	2	10

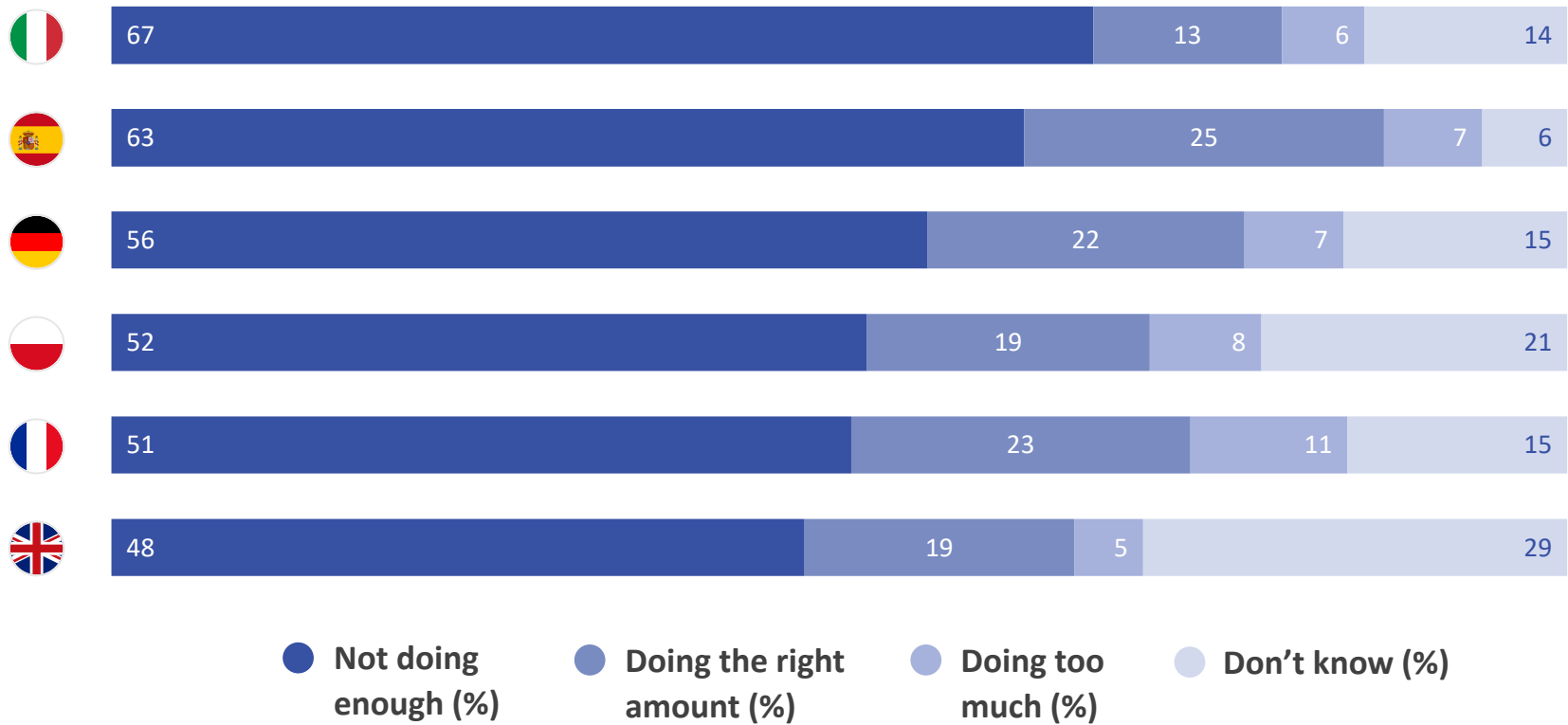
Of the specific issues facing young people in [COUNTRY] as we emerge from the pandemic, which ones do you think should be addressed as a priority? Select up to 3.

Youth: Intergenerational Concerns

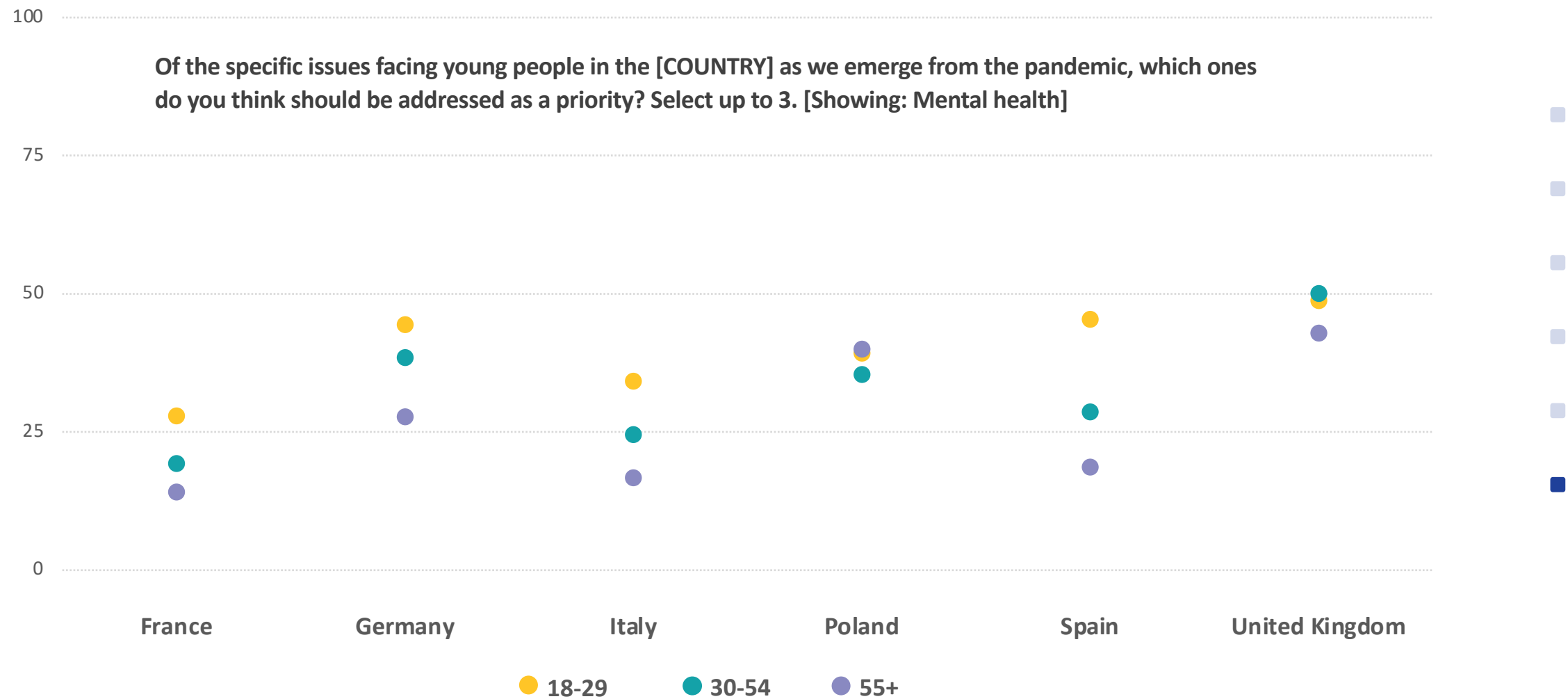
At least half think government not doing enough to help the young



Thinking about issues facing people under the age of 25, do you think the government is...



Mental health is a recurrent concern for the youth



Of the specific issues facing young people in the [COUNTRY] as we emerge from the pandemic, which ones do you think should be addressed as a priority? Select up to 3.

7. Country Insights: France, Germany, Italy, Poland, Spain, UK



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Key findings: France

- Social cohesion is in freefall in France. While the French had felt solidarity during the first epidemic wave, **they now think that "it's everyone for themselves"** (87%) and share a perception of **deeply divided society**. The convergence between "Identitarians" and "Left behind" segments in our French segmentation, who represent more than 4 out of 10 French people, has grown around a declining and anxious narrative.
- The French have a fairly **low confidence in the vaccine** compared to other European countries. Tensions around the unvaccinated are in second place in perceived divisions – after that between rich and poor – and risk calcifying over time. Rejection of the vaccine is the antechamber of a **new geography of protest**, which can lead to further alienation and departure from a shared reality.
- At this stage in the pandemic, the **French are mainly concerned about economic and social issues** including inequality and cost of living. This is true across segments and political leanings. The pandemic has narrowed horizons: aside from the most progressive segments, most have largely lost the ability to project into the future. Uncertainties are impacting voting intentions for the **2022 Presidential elections** with 3 out of 10 people who say they intend to vote, claiming they are undecided about their choice.
- While climate skeptics exist and are more numerous among Eric Zemmour's supporters, overall the **importance of the climate issue remains high in France in spite of the context**. 8 out of 10 French people consider the ecological transition an opportunity for employment and this is true across segments. Everyone expects more from the government on the green agenda. Utopian visions of the world after COVID have weakened, but they remain alive among a majority of French people who want change but doubt that it will happen. Encouragingly, the 10-year **future that the French want is above all ecological and human**.

Key findings: Germany

- The German COVID "**honeymoon**" **has ended**, we see sharp increases in civic disillusionment and cynicism. 55 percent show disappointment with country in pandemic (+23 since 2020). **Trust in federal government has worsened** with 41 percent under pandemic (+22 compared to June 2020). 42 percent say that people's concern for welfare of others has worsened under pandemic (+32 to 2020).
- The national debate on **Covid has created a new line of division in society**, crystallizing most prominently around the issue of vaccination. Overall feelings of division: 52 percent say German society is divided, 19 united, 28 neither. 59 percent say tone of public debate has worsened under Corona (+30 since 2020). Society is currently believed to be primarily divided along vaccination issues (62 percent) -> more so than in all other countries.
- Germans show a strong desire for political action, but radical transformation is not a goal per se. Instead, they demand the creation of a **better normality**. In line with earlier findings on the strong need for political action, 68 percent demand decisive instead of careful governance from new federal government.
- German society **shows cracks in relevant "early warning" indicators**. Only 67 percent say they believe federal elections were held in fair and correct manner: among the Invisible segment of the "Disillusioned", only 47 percent agree. Only 65 percent feel generally free in Germany, with no majorities among the Invisible "Disillusioned" and "Angry" segments. 71 percent believe the system to be rigged toward the wealthy and influential - with no positive counter-majority ("system works for most people") in any segment.
- **Climate change** and environment are - second only to Covid itself - the most important area for political action. But there is too little trust yet in collective action. Setting fair contributions and a transparent agenda, politics and big actors must lead the way to lay the ground for credible collective initiative.

Key findings: Italy

- The pandemic has left a **feeling of uncertainty** among Italians, particularly among young adults, who seem to have suffered the most from the effects of prolonged lockdowns and social isolation. Still, for the majority, the pandemic is seen as an opportunity for change. 59% agree about the need to seize the "opportunity provided by COVID-19 to make important changes"
- Italy is emerging from the crisis **even more divided than before**. Divisions in Italy have always been a part of the societal structure, along the lines of south vs north, rural vs urban, among social classes and especially along political lines. **In 2020 the pandemic had a temporary unifying effect** on Italians – being the first and hardest hit by the crisis. This might have produced a sense of pride and collective solidarity, which faded away with the "normalization" of the pandemic, generating instead even deeper social tensions around the issue of vaccines and the adoption of the "green pass", on top of already existing divisions. A new cleavage between vaccinated and non-vaccinated people has emerged.
- Italians are **concerned about the environment** and climate change and claim to have heard a lot about the ecological transition. Although they do not fully understand what it stands for, they do generally have a good opinion on the opportunities it can generate, but **do not trust public institutions to handle the recovery funds** which would enable the transition. 61% believe no political party is capable of addressing climate change.

Key findings: Poland

- The feeling of **more division than unity** has worsened over the course of the pandemic. Two-thirds of Poles (67%) believe the country is divided, with just 11% holding the opposite view. A huge majority (61%) believes that the differences within society are too big for Poles to come together – up 9 percentage points since just after the first wave of the pandemic.
- **Growing polarisation** affects institutions hitherto untainted by it. The degree of trust in the army and the police now depends to a significant extent on whether one is a supporter or an opponent of the government. A similar trend can be observed in the case of the **European Union**.
- Polish society is becoming not only more polarised **but also atomised**. The feeling that Poles look after each other is declining. Compared to July 2020, it has fallen by 17 percentage points to only 14% accompanied by a growing sense of distrust.
- Poland's handling of the pandemic has had a **negative impact on the people's confidence in the country's ability to cope with future challenges**. 47% of Poles now have less confidence in their country. 68% of Poles are disappointed with their country due to the way it is dealing with the pandemic. Accordingly, most Poles wish for a return to the pre-pandemic status quo rather than embracing sweeping social change.
- Although climate issues do not make it to the top of the agenda, **Poles regardless of political sympathies are fairly committed to tackling climate change**. Even if not without some concern and a sense of uncertainty, many Poles expect the green transition to benefit their lives and the economy. Over half of Poles (54%) believe that implementing the green transition is a good investment of public funds.

Key findings: Spain

- Spaniards describe the country first and foremost as **divided**. But **the divisions are seen mostly as ideological**, no divide is seen as more relevant than left-right. In fact, we see different patterns in response to a variety of issues (except on climate) along these lines. Spaniards are unified in their exhaustion with division in politics and all point fingers to politicians as the ones to blame. Fully 71% say that political parties are to blame for causing division in Spain. 30% of Spaniards (54% of Vox voters) say that they feel like losers of social change.
- Despite the perception of division, **Spaniards are the most likely to say that others can be trusted**, with a small majority who believes this to be true. Spaniards are also the happiest and amongst the most hopeful, least anxious and least likely to feel lonely. And Spaniards also agree, across age groups, geographies, and parties about what the priorities should be: work and jobs, COVID-19, and addressing the increase in energy prices.
- Confidence in government, journalists, and most institutions is extremely low**, which is reflected in the belief that the EU recovery funds will be wasted and will have no impact. However, trust in scientists and medical personnel, and small businesses, is extremely high. 54% of Spaniards say the EU recovery funds will be wasted.
- There are very **high levels of sympathy on climate issues**, shared across the board (although Vox voters are an outlier and the only ones amongst which a few think that it's not a good use of public resources). But climate is not a salient issue that features prominently amongst the most important issues facing the country today. Spaniards also believe that climate change requires a whole of society approach and all actors are responsible. 85% of Spaniards are worried about climate change but only 13% select it as a top issue.

Key findings: UK

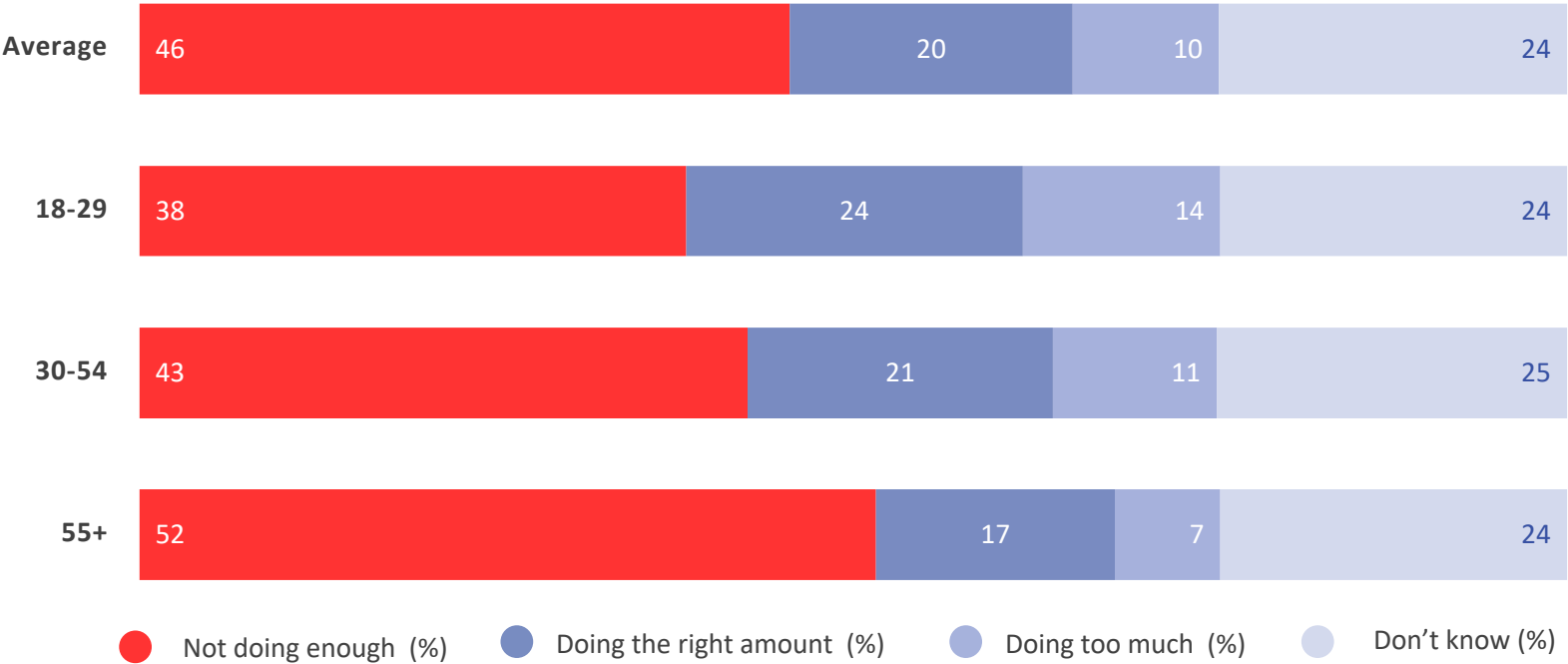
- **Trust in the system and society has eroded during the pandemic in the UK.** There is space for a populist party to take advantage of discontent.
- The **cost of living is people's number one concern**, people are worried about the rising cost of food, energy, and bills. 62% expect the cost of living to become more difficult in the next year. Other priorities that interact with cost of living – such as transition to net-zero may suffer as a result.
- **Pandemic fatigue is high.** Many people want life to return to normal. 62% want their life to go back to normal after the pandemic. The appetite for upheaval or radicalism is limited, after Brexit years and the pandemic, **Britons yearn for normality.**
- The Government's **Levelling Up Policy has the potential to restore trust in democracy** as well as being a key issue for the next election. 59% say levelling up will be key to deciding their vote at the next election. Stakes are high for the policy – need to meet expectations or risk backlash.
- The **NHS remains the most trusted institution** in the UK. 59% think tackling NHS waiting lists is the key post pandemic priority. Potential to crowd out other policy areas both in investment and headspace.
- **There remains a clear action gap between personal commitment for reaching net-zero on climate and willingness to make major lifestyle changes.** 82% think they have a responsibility to make green choices, only 2% currently drive an electric vehicle, only a third will consider switching soon. Worry about cost/being ripped off/reliability means green choices often stall.

Appendix: Social Media Regulation Deep Dive

Support for social media regulation varies little by age



What is your view of the regulation of social media platforms, like Facebook, TikTok and YouTube? Is the government...



What is your view of the regulation of social media platforms, like Facebook, TikTok and YouTube? Is the government...?
Categories sum: Doing far too much + Doing too much; Doing the right amount; Not doing enough + Not doing nearly enough; Don't know.

Young people care more about mental health, older people about scams



Which of the following issues with social media do you think government should do more to address, if any? Select up to 3.

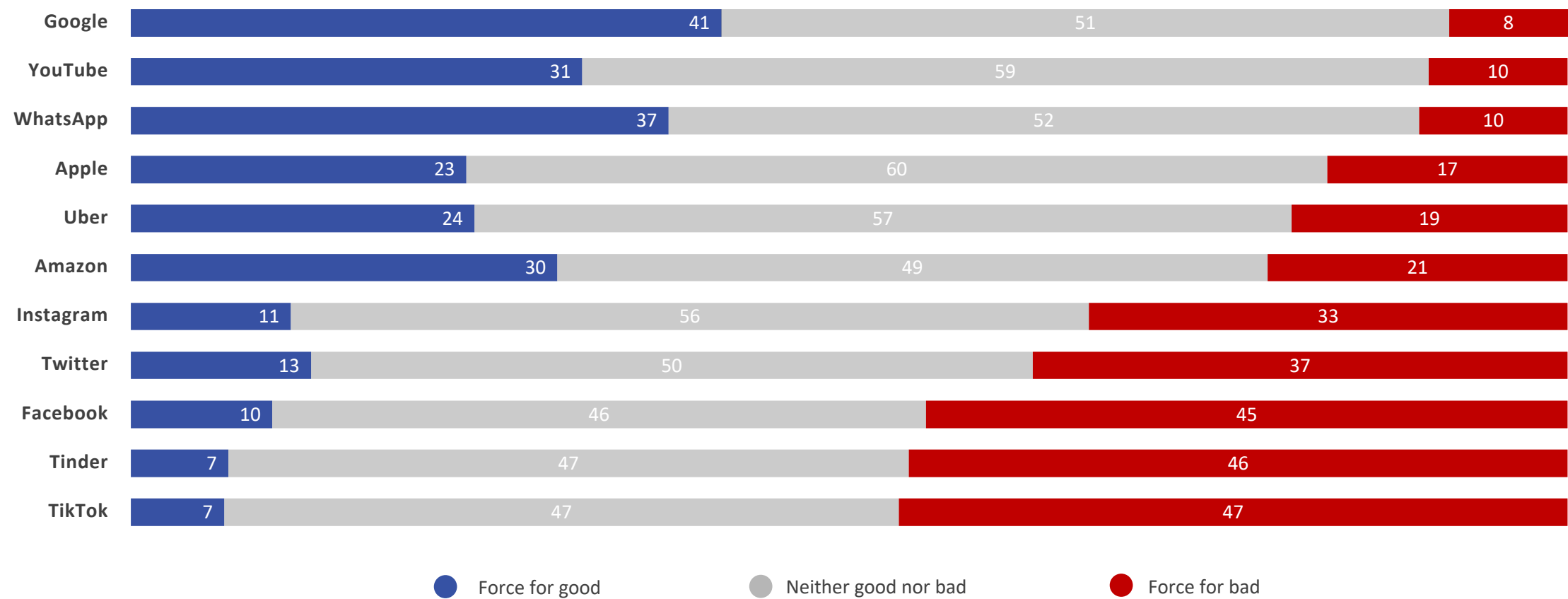
	Average	18-29	30-54	55+
Hate speech or violence	52	42	47	60
Scams and fraudulent activity	51	39	46	61
Misinformation or fake news	48	44	44	53
Impacts on children and young people	38	33	38	40
Loss of privacy	24	23	25	24
Mental health impacts	21	32	23	16
Don't know	7	9	8	6
None of the above	2	4	3	2
Other	1	1	1	1

Which of the following issues with social media do you think government should do more to address, if any? Select up to 3.

In the UK, Twitter is seen as less bad than Facebook and TikTok, but still amongst the worst social media platforms



Do you think the following platforms are generally a force for good or bad in the UK today?



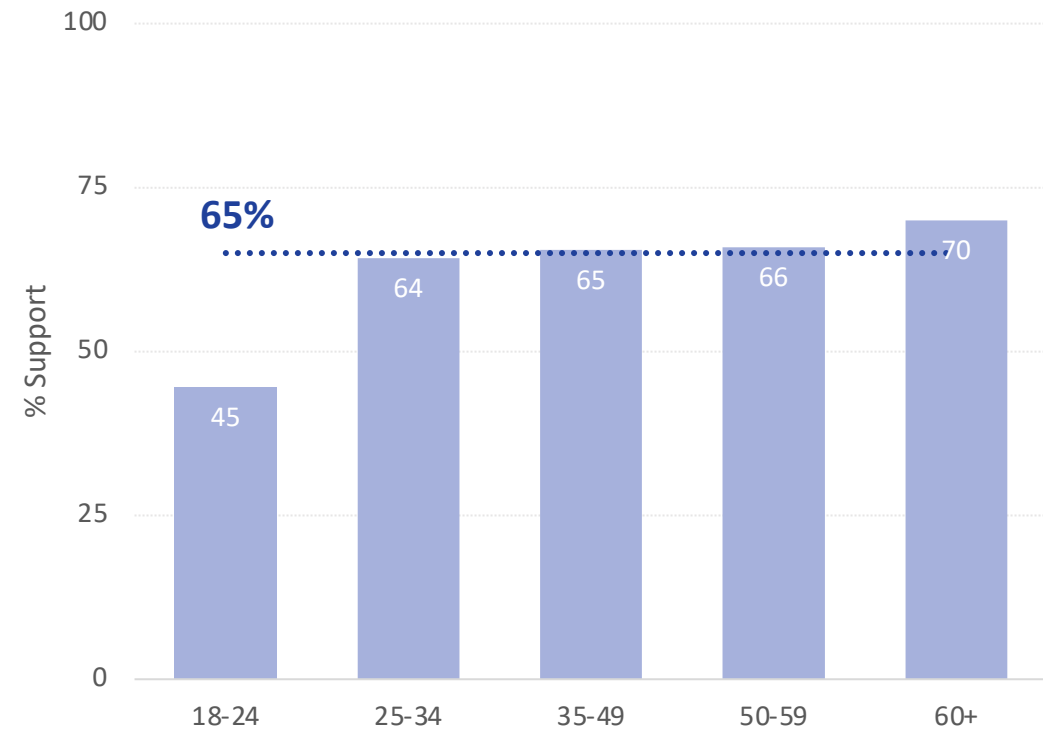
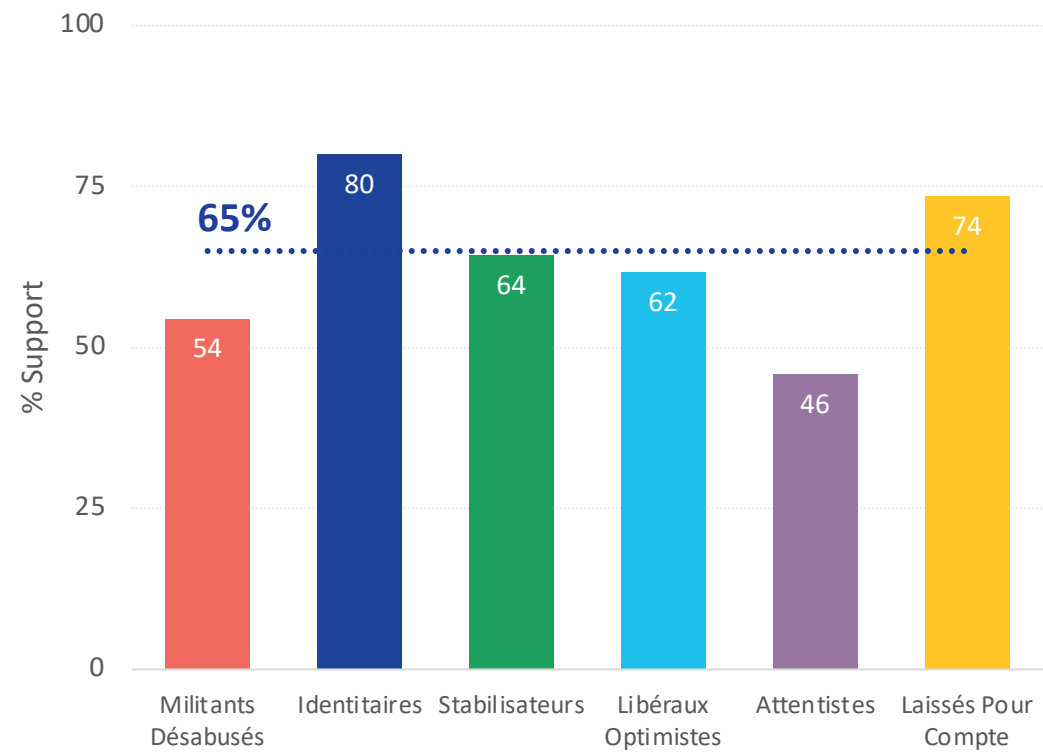
UK Only: Do you think the following platforms are generally a force for good or bad in the UK today? [Results for 'Don't knows' and 'Never heard of it' excluded]

In France, 2 in 3 support the banning of social networks for under 16s



The Identitarians and the Left Behind are most in favour of this radical approach. The demand for regulation increases with age.

Would you support the state banning access to social networks for under 16 year-olds?



France only: Would you support the state banning access to social networks for under 16 year-olds? France national average: 65%



Thank you

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