

**Transformation  
Challenges  
for a Europe facing  
the “3D” crisis**

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**No Com**

November-December

2022

# EUROPE IS FACING A “3D” CRISIS

## 1- DISCONNECTION

“ we don't live the same life, you don't look like me and don't listen to me, we don't understand each other”

## 2- DISTRUST

“we don't believe you anymore: you speak but don't act, you speak and nothing concrete happens”

## 3- DESPAIR

“we don't know where we're going, we fear that our children will have a worse life than ours”

# EUROPE IS FACING A “3D” CRISIS

## The era of disconnection

### 1- DISCONNECTION

“we don't live the same life, you don't look like me and don't listen to me, we don't understand each other”

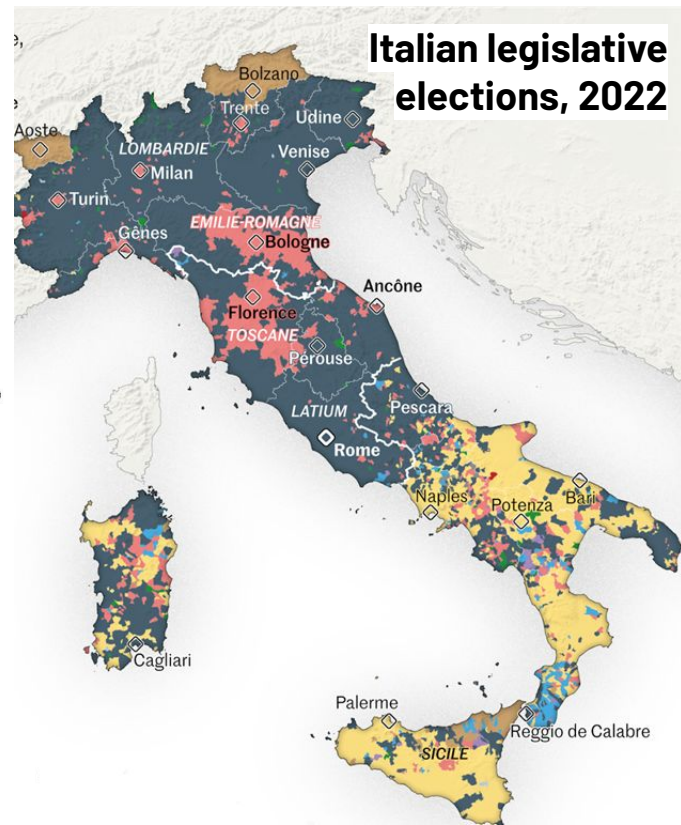
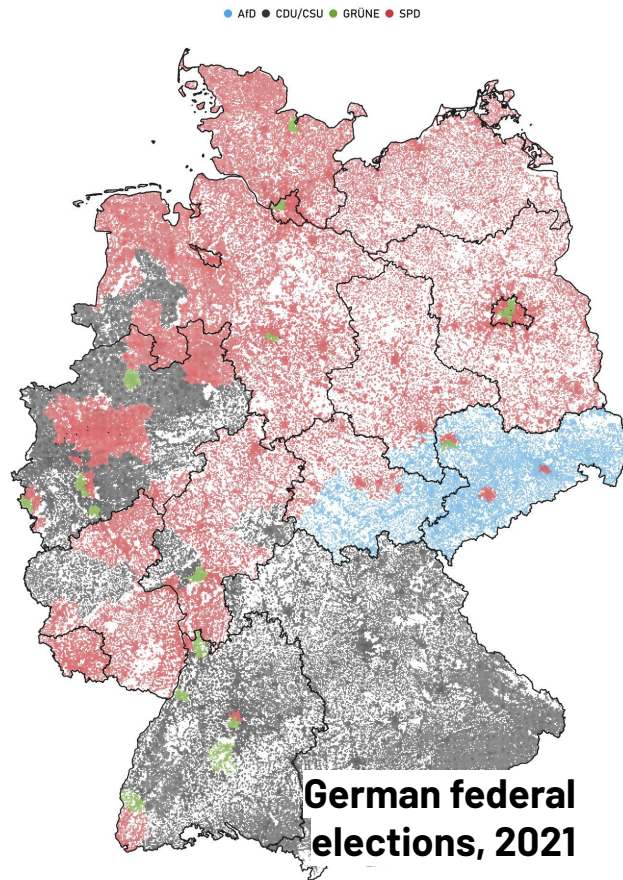
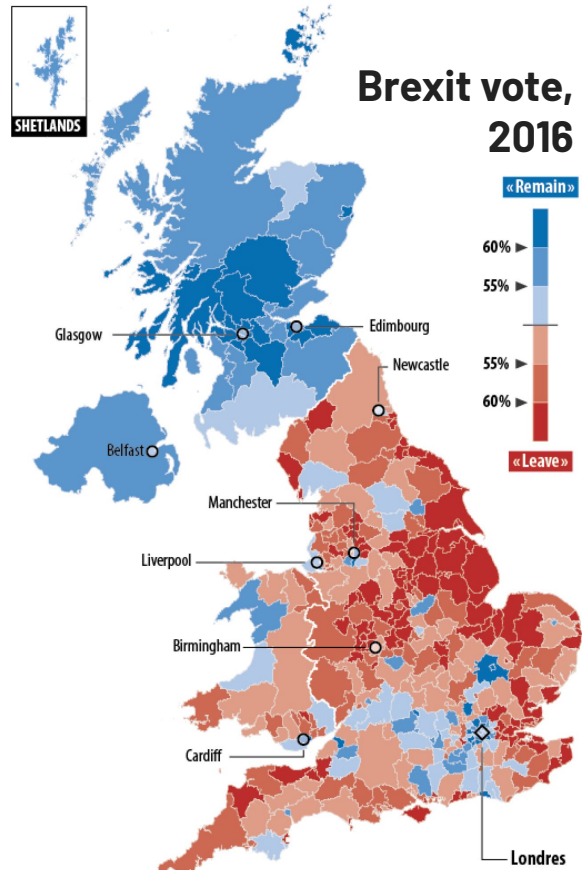
### 2- DISTRUST

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“we don't know where we're going, we fear that our children will have a worse life than ours”

# National crisis among historical European countries



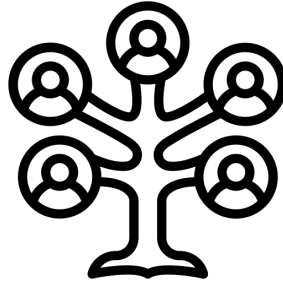


# DIVIDE

## 4 divides regarding the french presidential election (2022)



Geographical



Generational

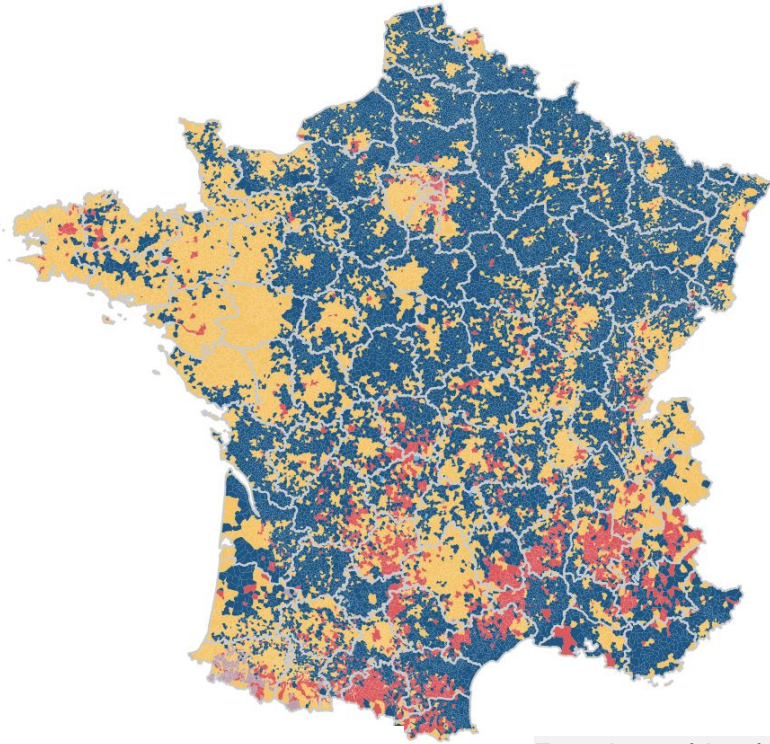


Income



Faith

# 1. Geographical: metropolises VS peripheries



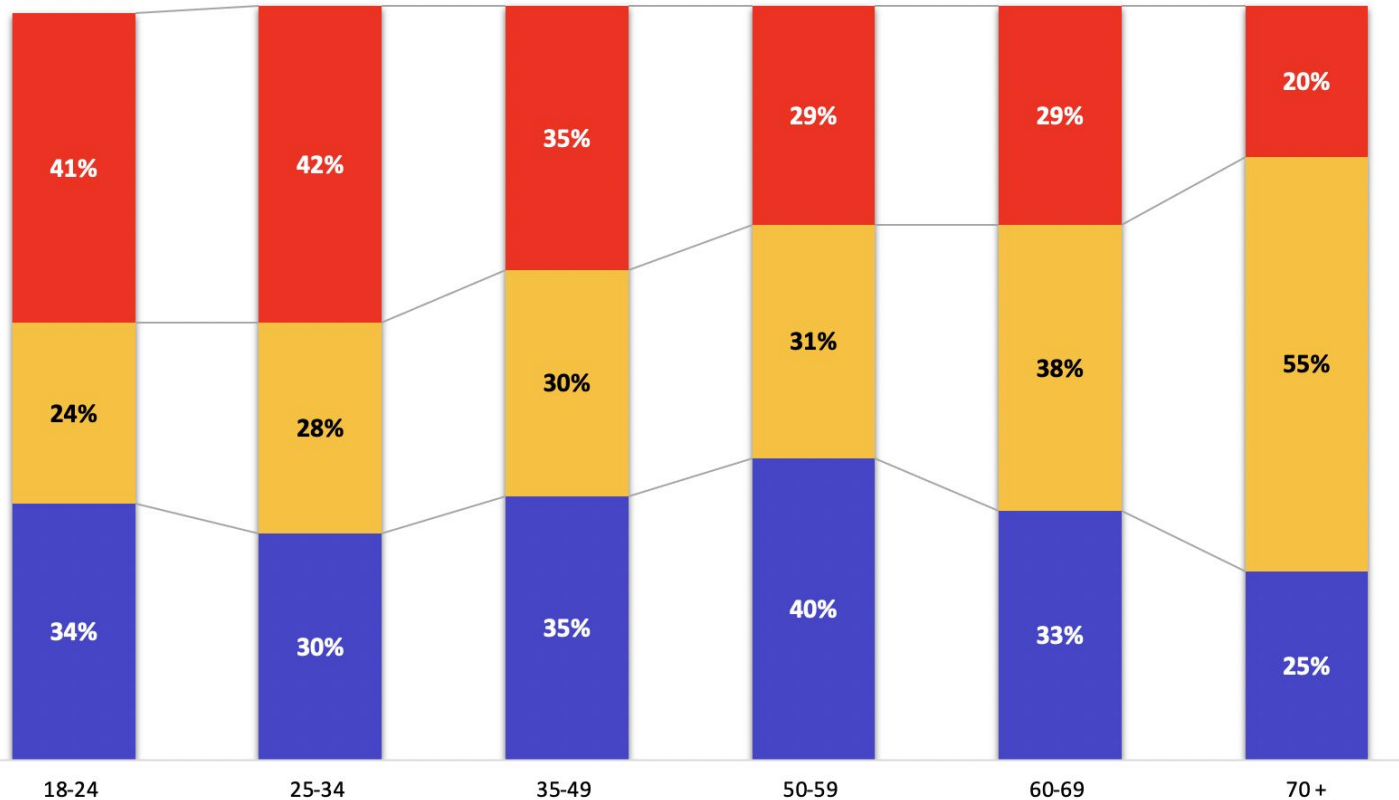
French presidential  
election, first round  
April 2022

**Big cities such as Paris, Lille, Strasbourg, Lyon, Bordeaux etc clearly appeared as moderate stronghold** (in orange), in which the electorate of Emmanuel Macron is concentrated. On the other hand, **metropolitan peripheries voted for the radical right**, represented by Marine Le Pen (in blue).

In addition, if part of the south mainly vote for the radical left (in red), we can observe that **regions with little economic issues such as the west shores voted moderate** (in orange) whereas the **north, where unemployment is concentrated, voted for the radical right** (in blue).



## 2. Generational divide: workers VS retirees

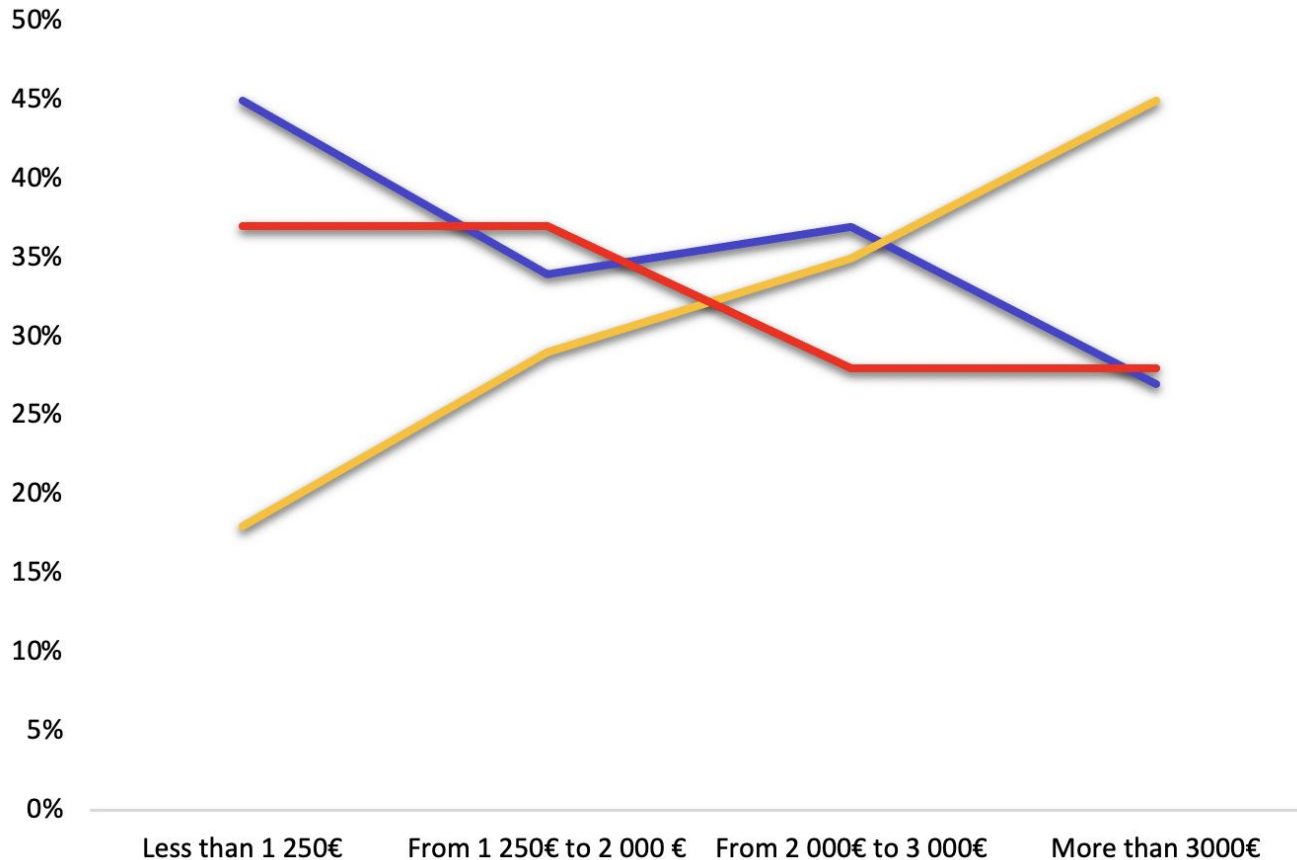


On this graph, we can analyse french people's vote **according to their age group**, French presidential election, first round, April 2022.

- Radical left and ecologist
- Moderates
- Right-wing radical

Ipsos, 2022

### 3. Income divide: the “rich” VS the impoverished

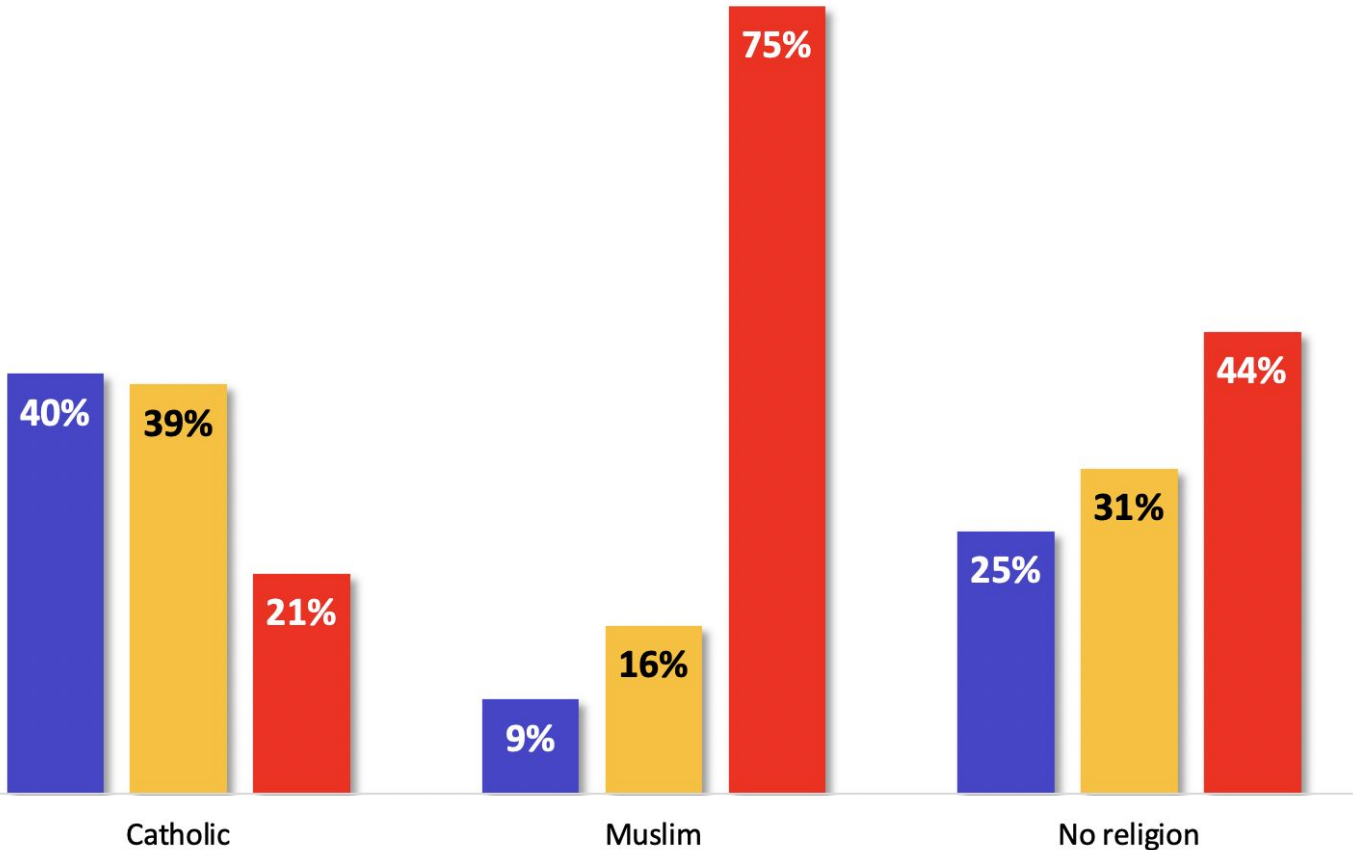


On this graph, we can analyse french people's vote **according to their income**, during the French presidential election, first round, April 2022.

- Radical left and ecologist
- Moderates
- Right-wing radical



## 4. Faith divide: the birth of a muslim vote

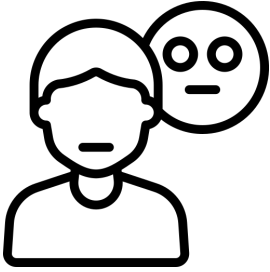


On this graph, we can analyse french people's vote **according to their religious beliefs**, during the French presidential election, first round, April 2022.

- Radical left and ecologist
- Moderates
- Right-wing radical

*Sondage Ifop, first round, 2022*

# DISENGAGEMENT



Loss of interest in the  
**democratic process**



A weak feeling of  
**belonging**

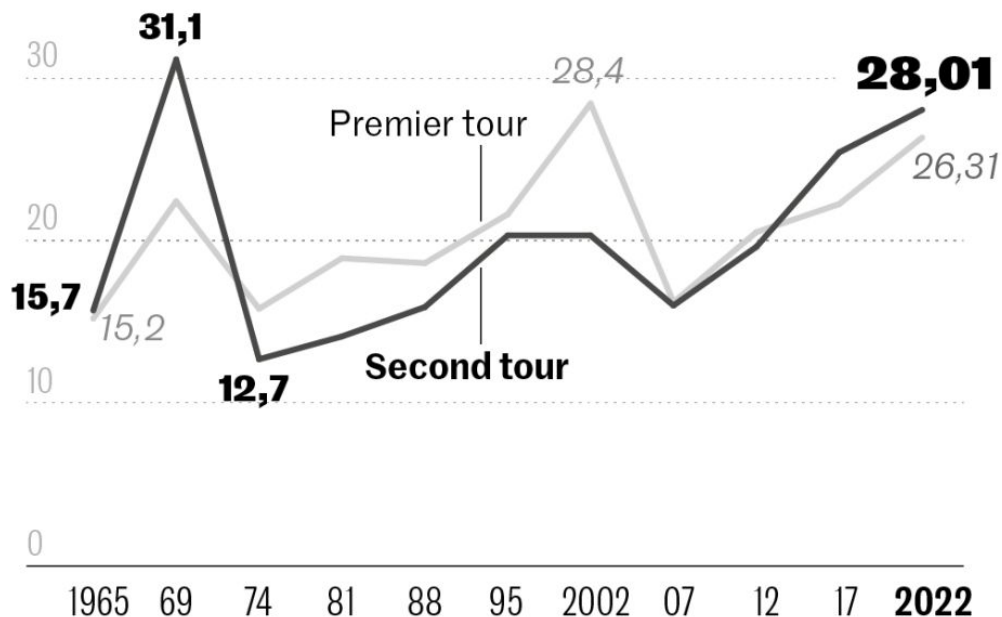


A feeling of **loss of control**

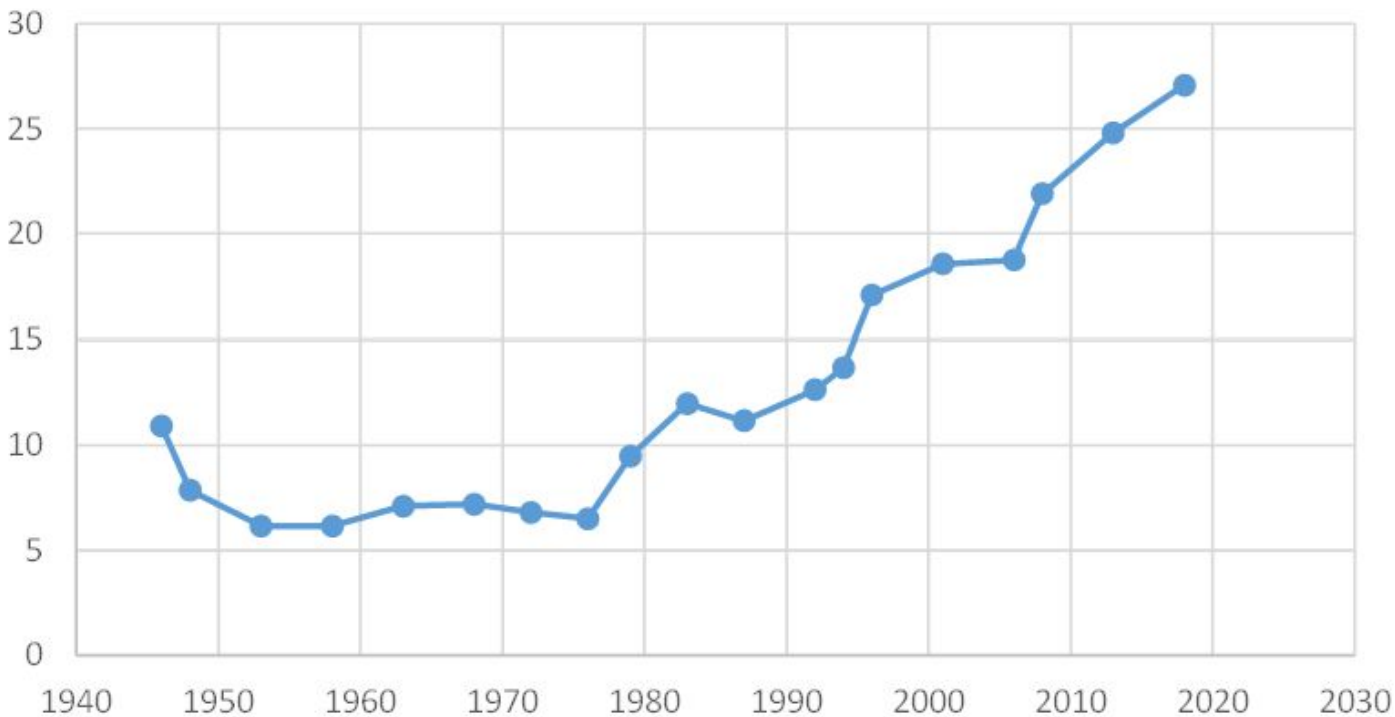
# Loss of interest in the democratic process

## Abstention is the new first french political force

### Taux d'abstention aux premier et second tours des élections présidentielles depuis 1965, en % des inscrits



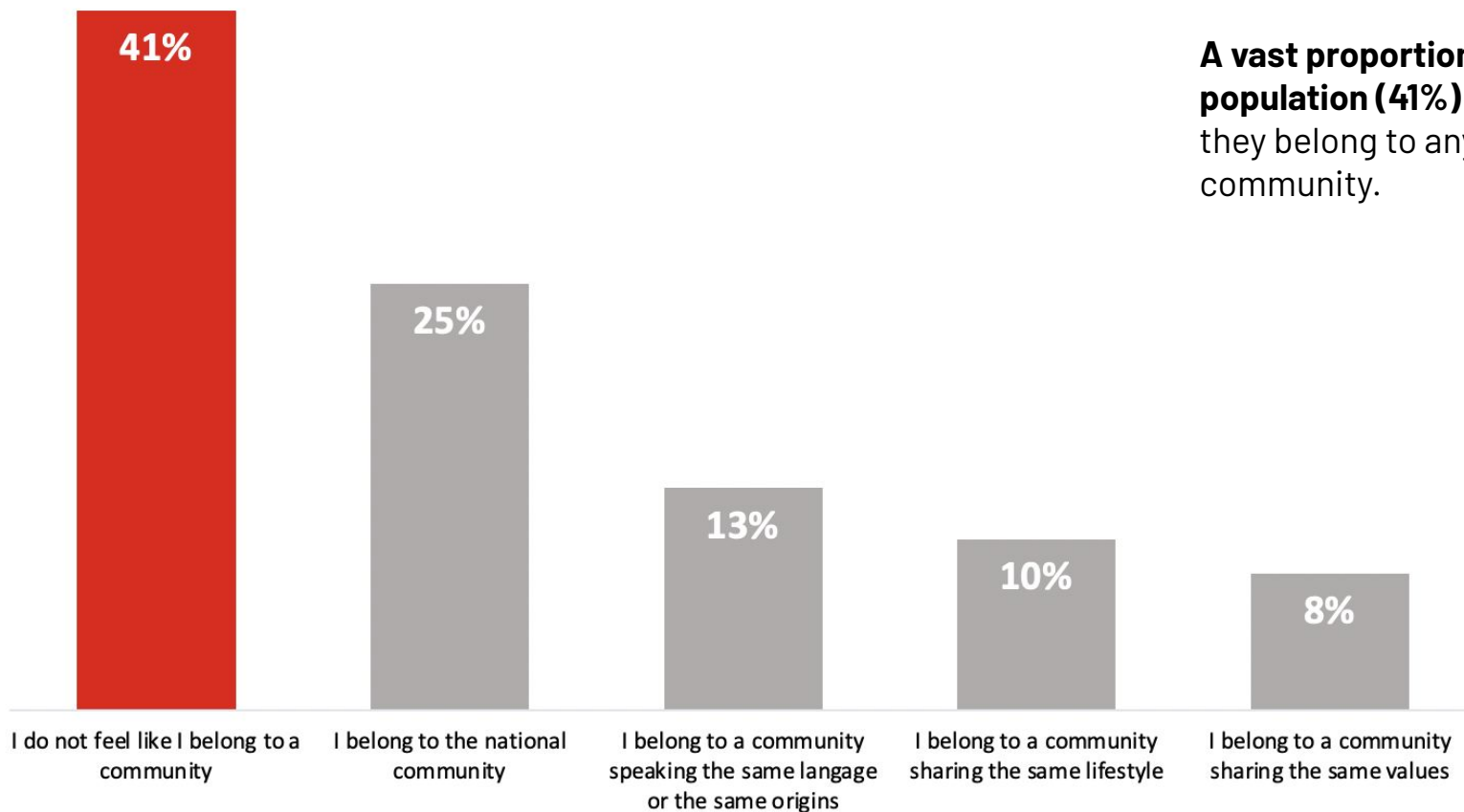
# A loss of interest for elections common to the main EU countries: e.g. 2022 elections highest ever abstention in Italy





## An overall weak feeling of belonging

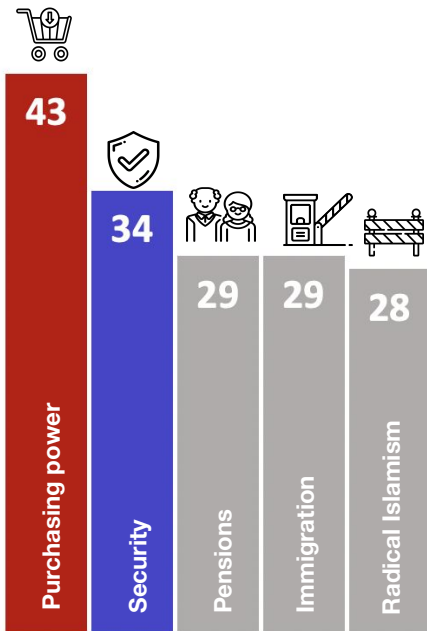
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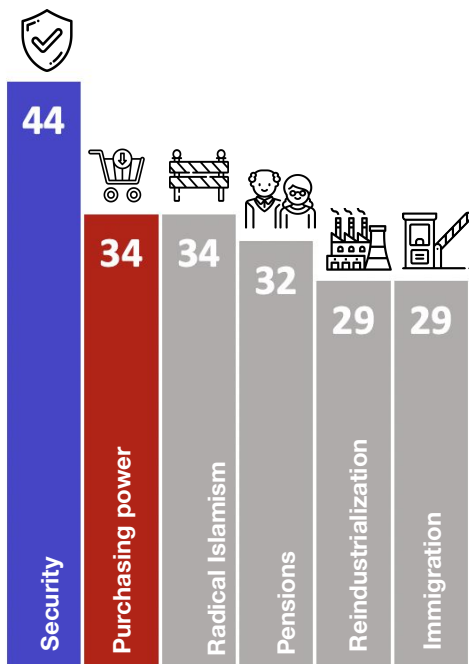
**A vast proportion of the french population (41%)** do not feel like they belong to any kind of community.

*Opinion Way  
Cevipof january  
2022*

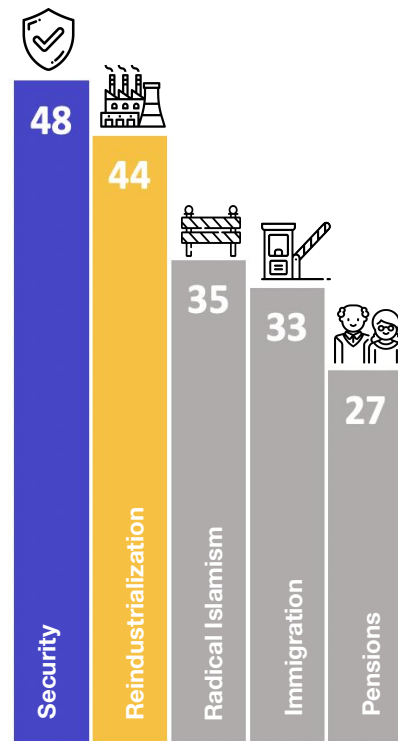
# Identity & purchasing power: the double loss of control



Modest classes

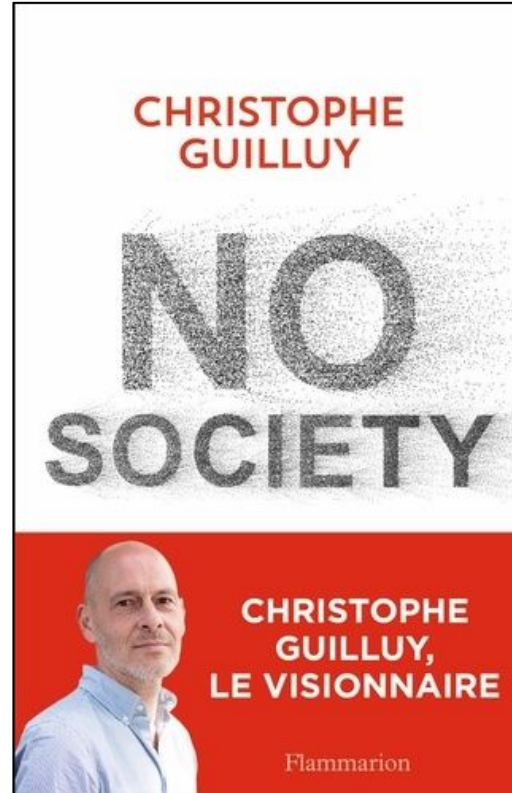
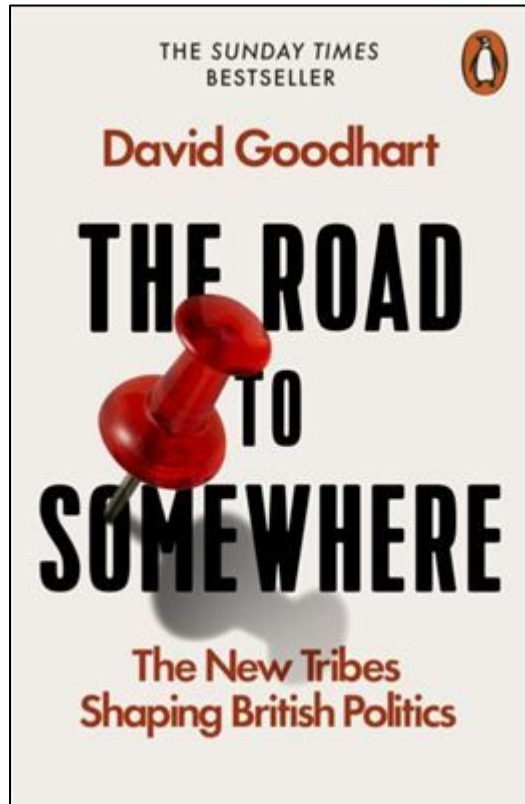


Middle classes



Wealthy classes

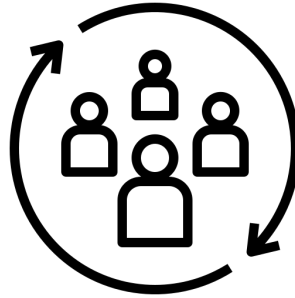
European people feel disconnected:  
anywhere VS somewhere



## DESPITE THIS DISCONNECTION...



People remain **satisfied**  
with their life



**Transformation** remains a  
positive concept



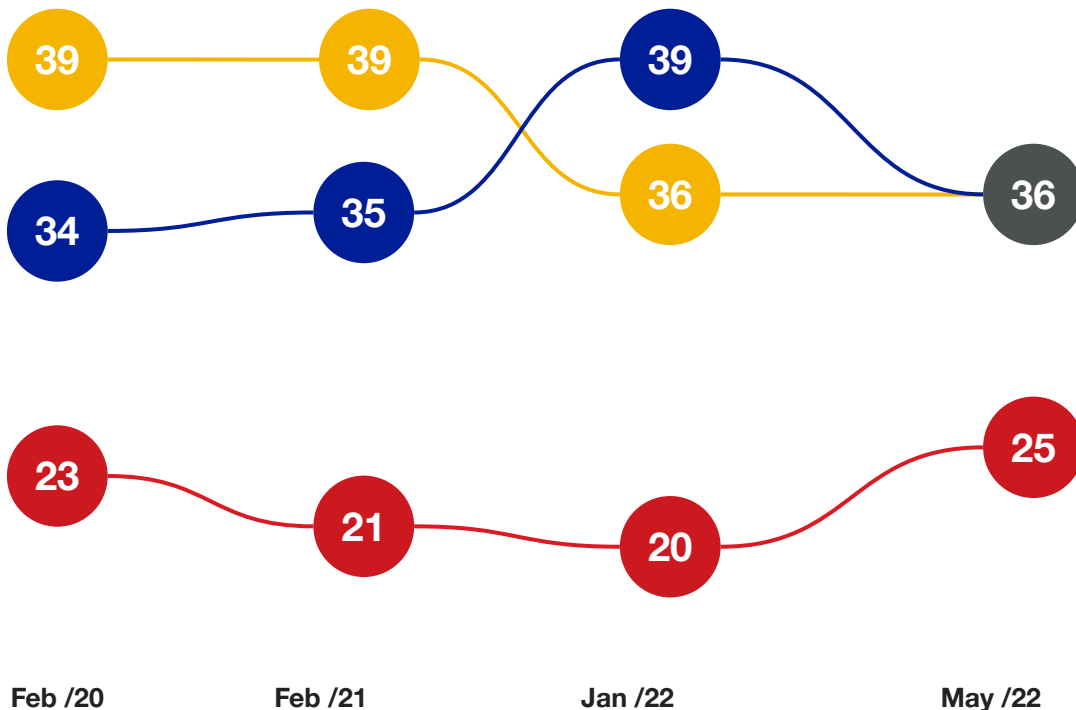
Individuals still show a  
desire for **benevolence**





# People remain satisfied with their life

Satisfaction regarding one's life (in %):



**A majority of people (72%) are either neutral or satisfied regarding their life.** 36% of the french population is satisfied.



Opinionway, Cevipof, En qu(o)i les Français ont-ils confiance aujourd'hui ?, 2022





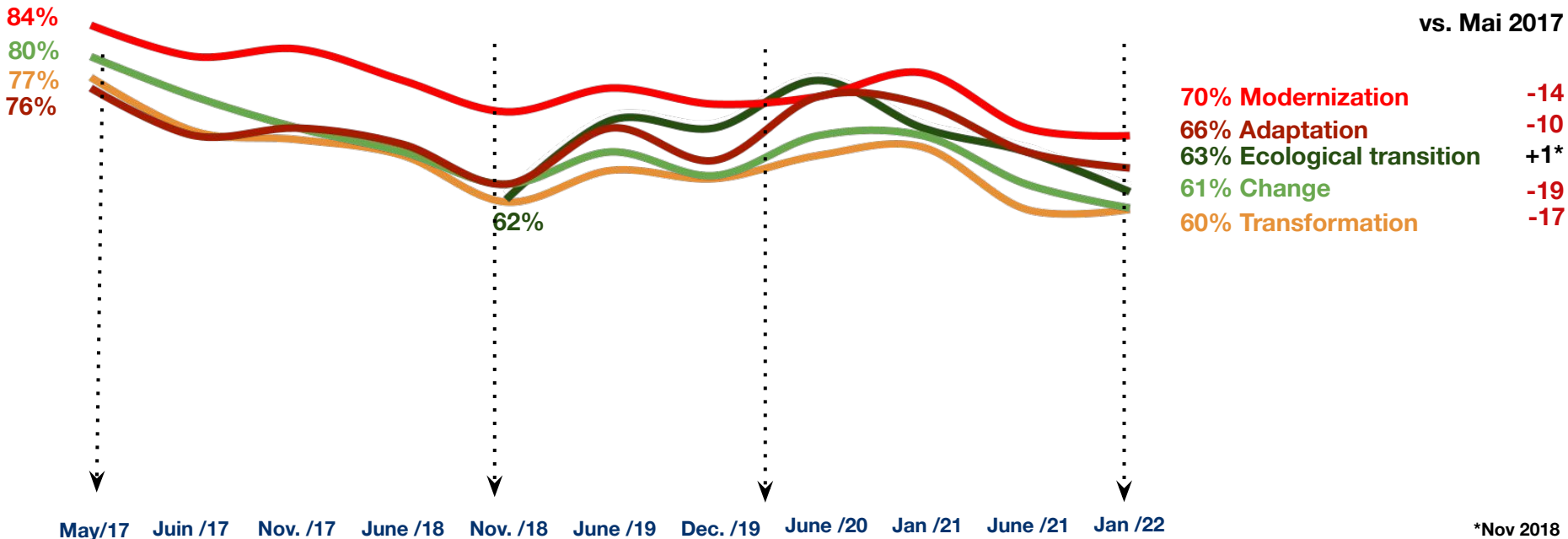
# Transformation remains a positive concept

Do those words evoke something positive to you?

Macron's 1st election

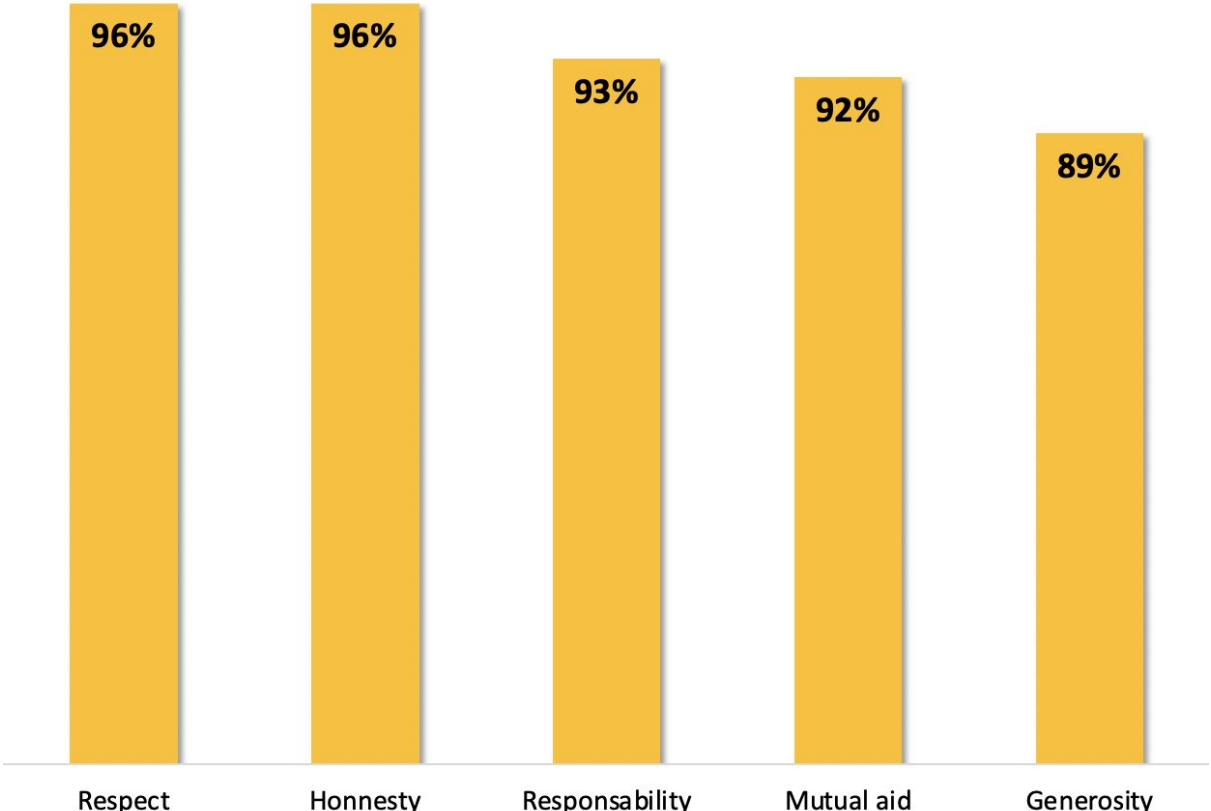
Yellow jackets

Covid crisis





# Values related to altruism are crucial for a majority of French people



Harris interactive, le cœur des Français, august 2021



**misunderstanding**

disintegration

**division**

**fractures**

distance

withdrawal

**loss**

responsability

**identity**

**aspirations** protection

benevolence

**security**

**change**

**misunderstanding**

disintegration

**division**

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distance

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**loss**

responsability

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benevolence

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# EUROPE IS FACING A “3D” CRISIS

## The advent of distrust

### 1- DISCONNECTION

“we don't live the same life, you don't look like me and don't listen to me, we don't understand each other”

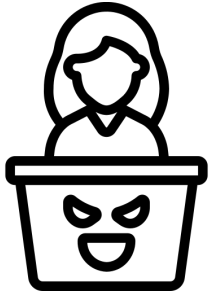
### 2- DISTRUST

“we don't believe you anymore: you speak but don't act, you speak and nothing concrete happens”

### 3-DESPAIR

“we don't know where we're going, we fear that our children will have a worse life than ours”

# THE ADVENT OF DISTRUST



Lack of trust towards the **government and its institutions**



Lack of trust towards **large businesses**

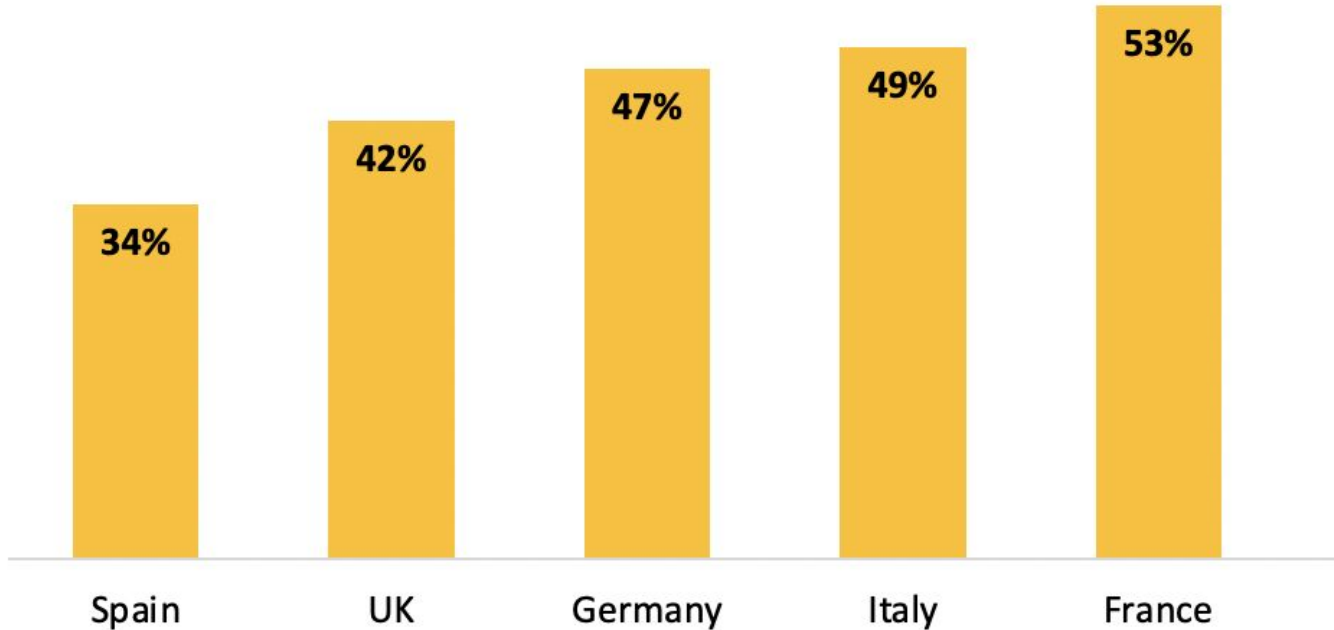


Lack of trust towards **medias**



Lack of trust towards **other people**

# European democracies have low trust in their governments



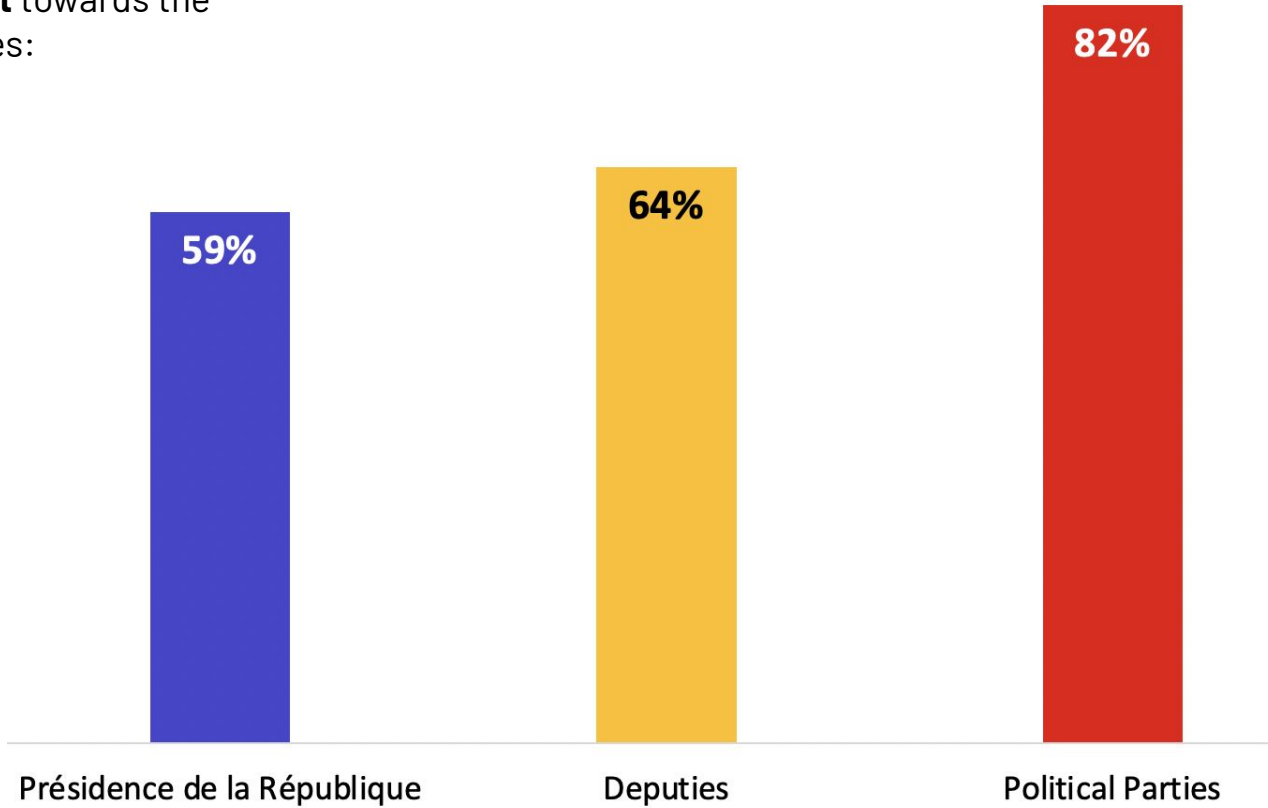
*Edelman trust  
barometer, 2022*





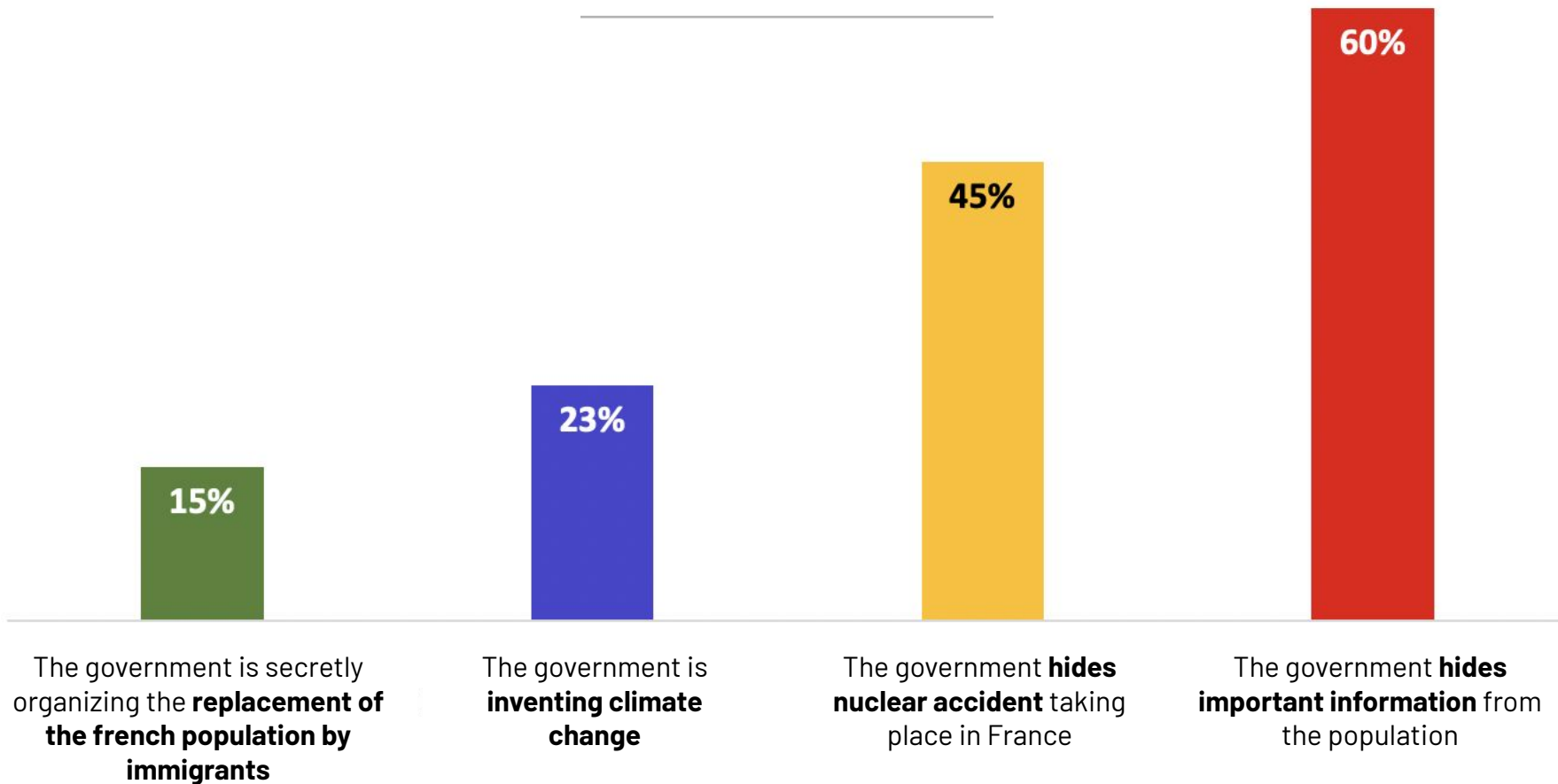
## Zoom on France's distrust towards political institutions

Level of **distrust** towards the following entities:





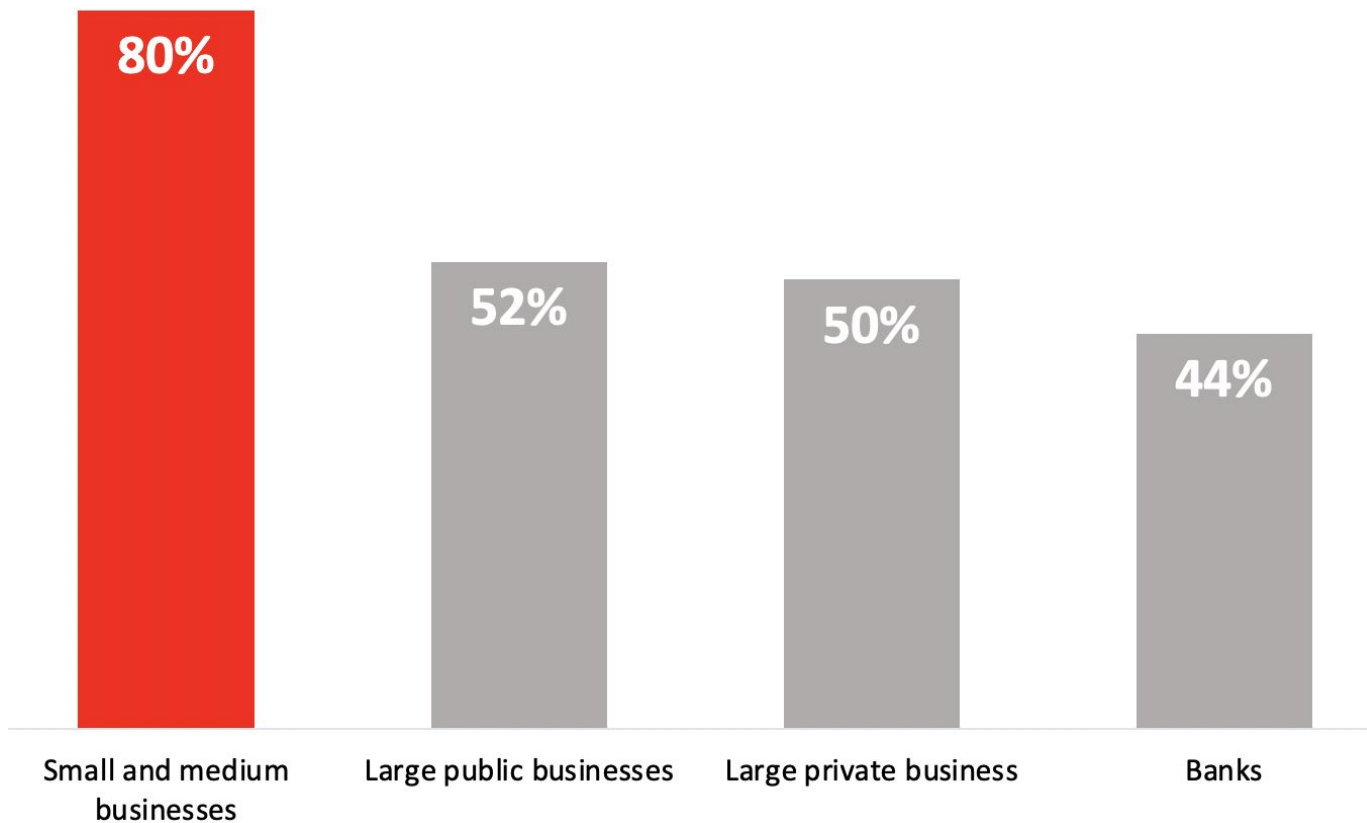
## Conspiracies theories are gaining ground





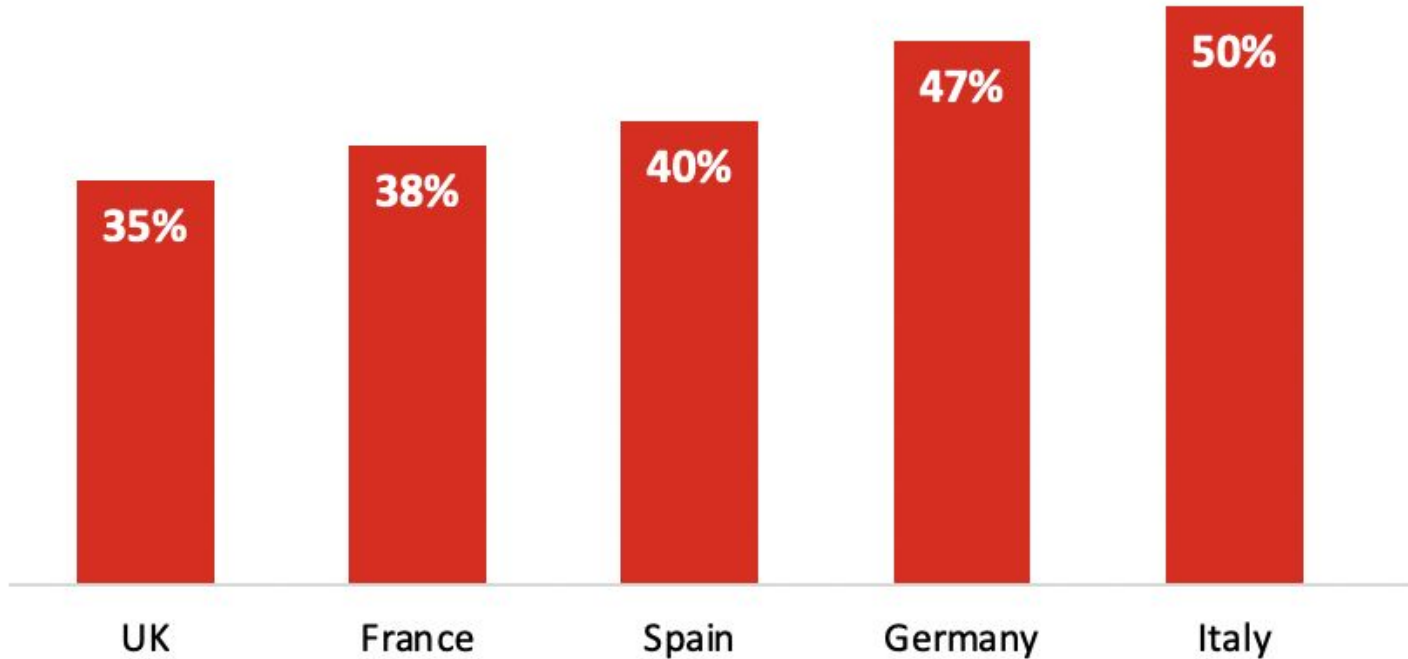
## Small businesses are the most trusted

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*Opinionway, En qu(o)i les Français ont-ils confiance aujourd'hui ? 2022*

# Trust in media is particularly low in european democratic countries

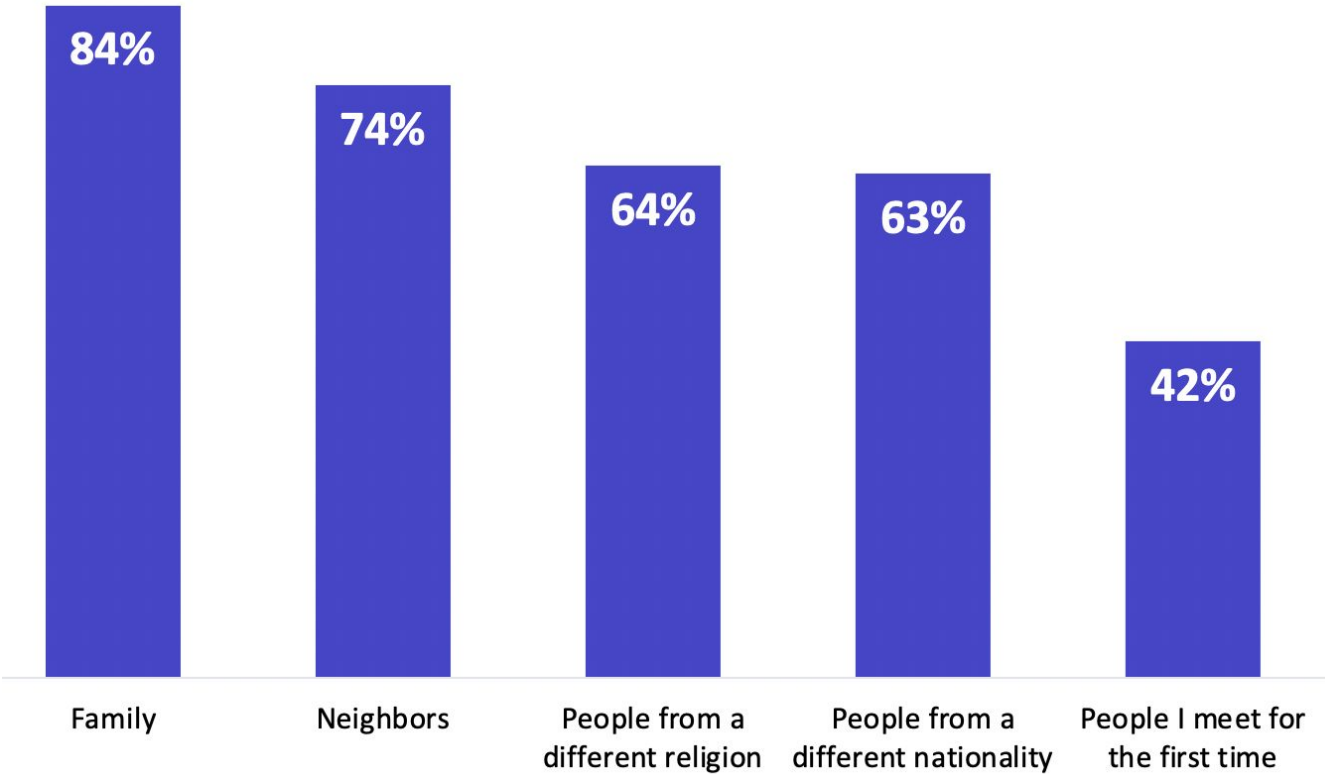


*Edelman trust  
barometer,  
2022*



# People trust those who are close to them

The trust granted to these different groups by the french population:

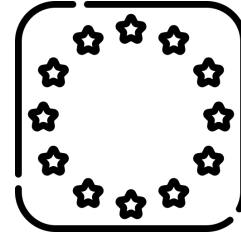


*Opinionway, "En qu(o)i les Français ont-ils confiance aujourd'hui ?", 2022*

# DESPITE THIS DISTRUST...



**The level of trust in some organizations and areas remains high and continues to rise**



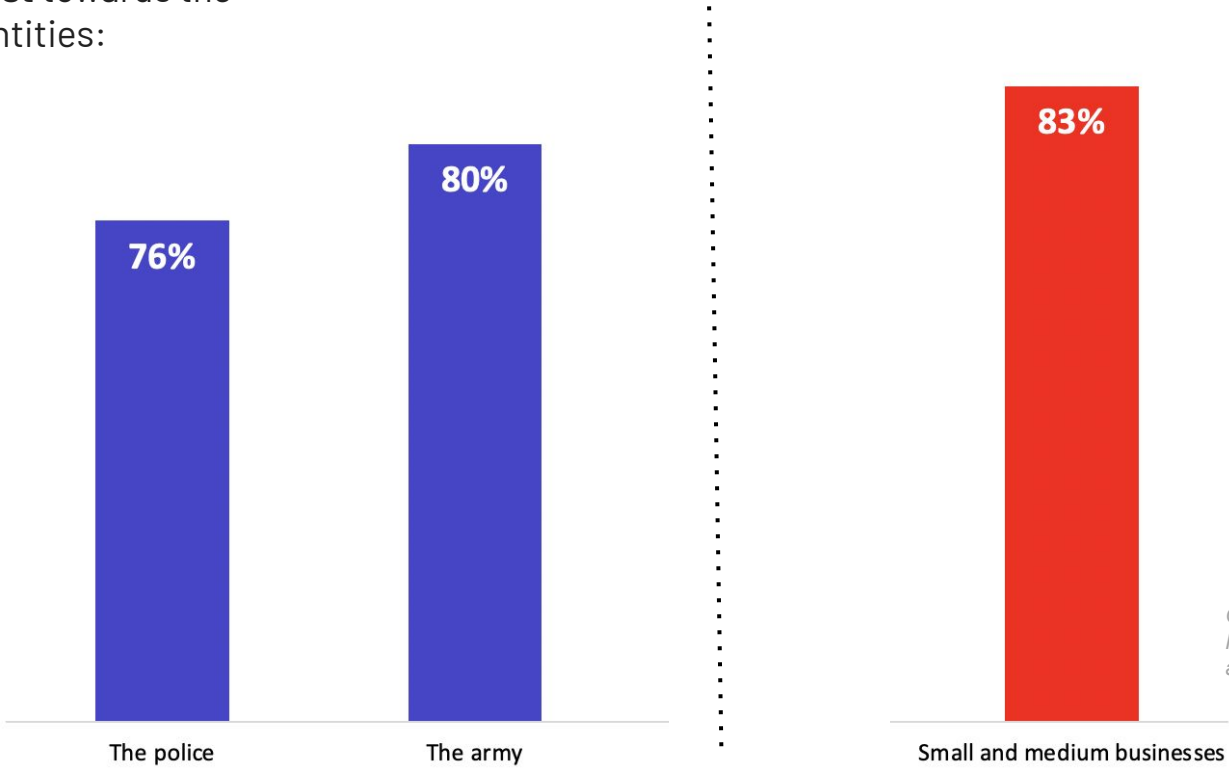
**Ukrainian war may have given a new breath to the European Union**



# Zoom on France's trusts

Trust in **defence** and **small businesses** is high

Level of **trust** towards the following entities:



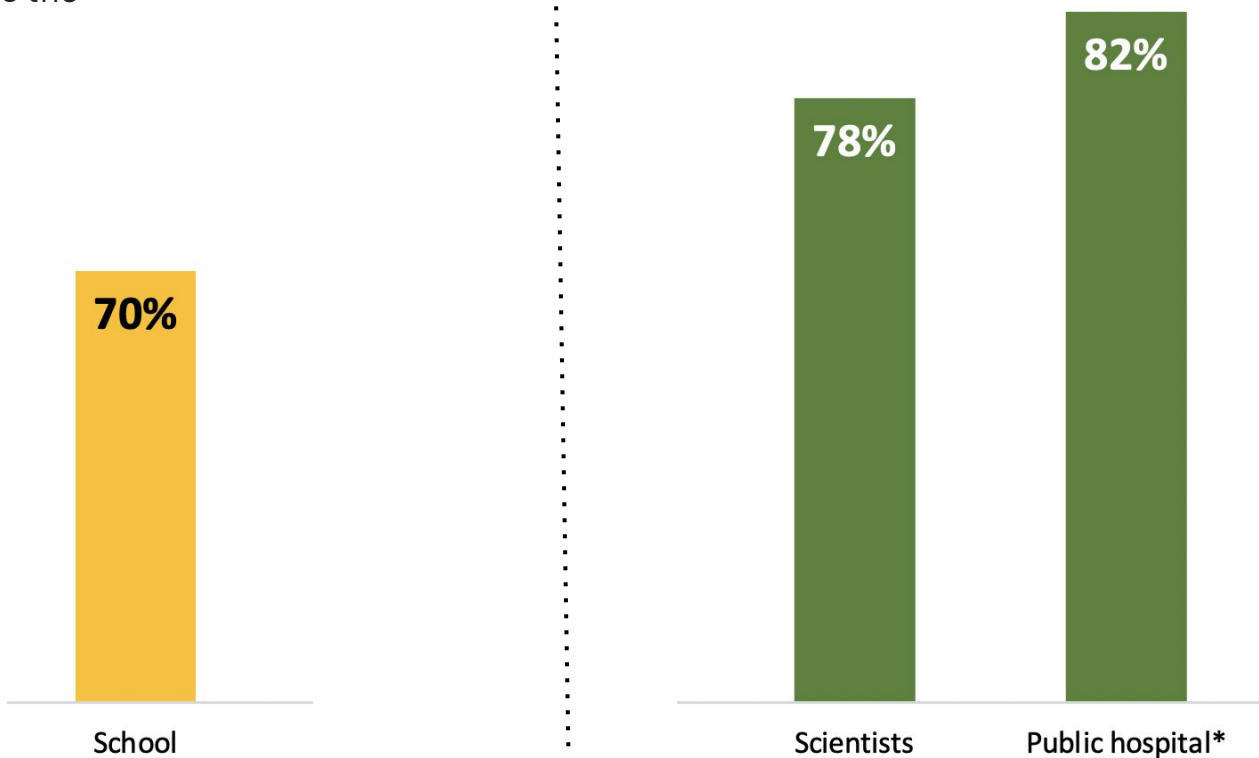
*Opinionway/Cevipof, "En qu(o)l les Français ont-ils confiance aujourd'hui ?", january 2022*



# Zoom on France's trusts

Trust in **education** and **science** is high

Level of **trust** towards the following entities:

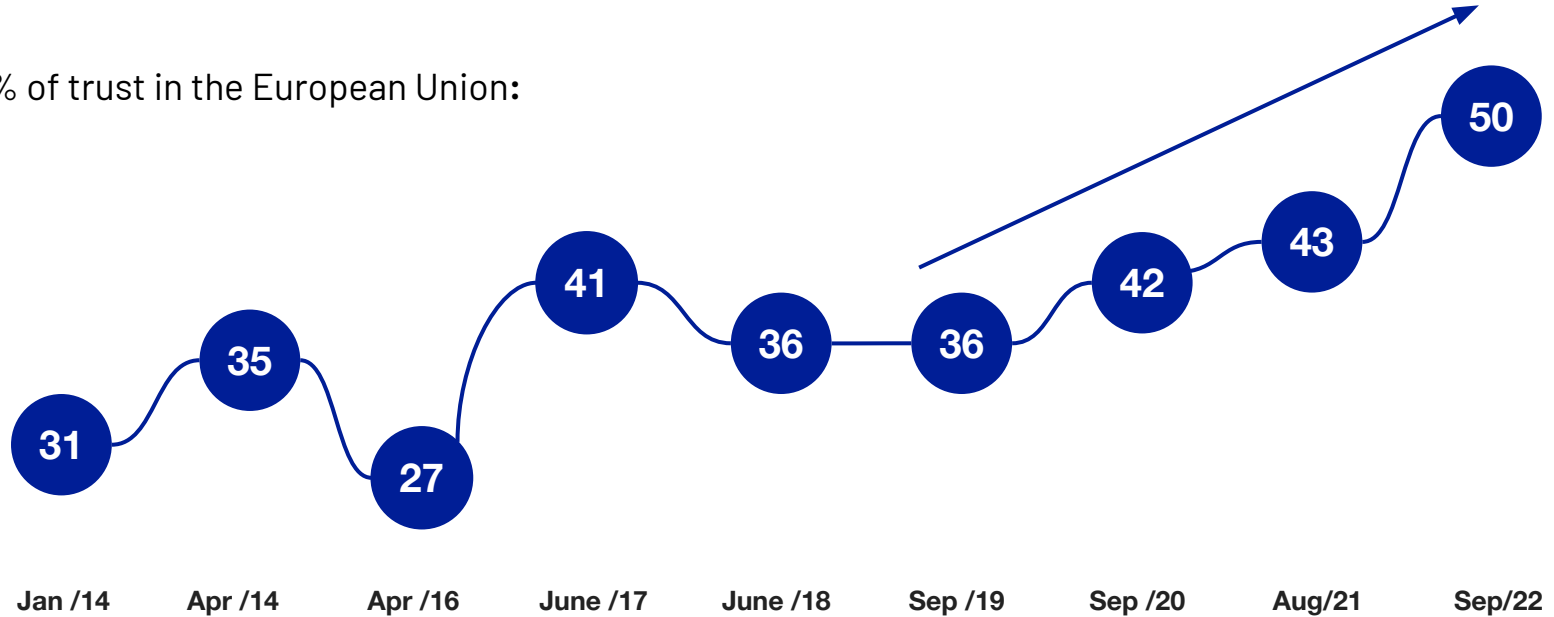






# Confidence in the EU rises in a context of multiple crisis

% of trust in the European Union:



**distrust**  
**distance** **paranoïa**  
**scepticism** **lies**  
**abuses** **mishandling**

**proximity** **sciences**  
**expertise** **europe**  
**education** **defence**  
**care**

distrust  
distance  
paranoïa  
scepticism  
lies  
abuses  
mishandling

proximity  
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expertise  
europe  
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care

# EUROPE IS FACING A “3D” CRISIS

## Despair

### 1- DISCONNECTION

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### 2- DISTRUST

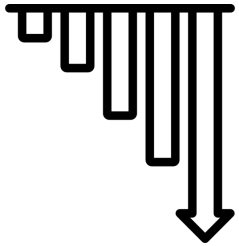
“we don't believe you anymore: you speak but don't act, you speak and nothing concrete happens”

### 3-DESPAIR

“we don't know where we're going, we fear that our children will have a worse life than ours”

# EUROPEAN COUNTRIES FACE THREE MAJOR STRUCTURAL FEARS

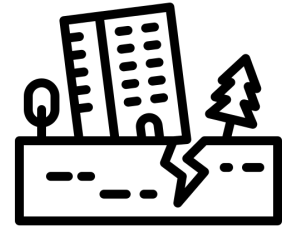
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Personal and global  
**downgrading**



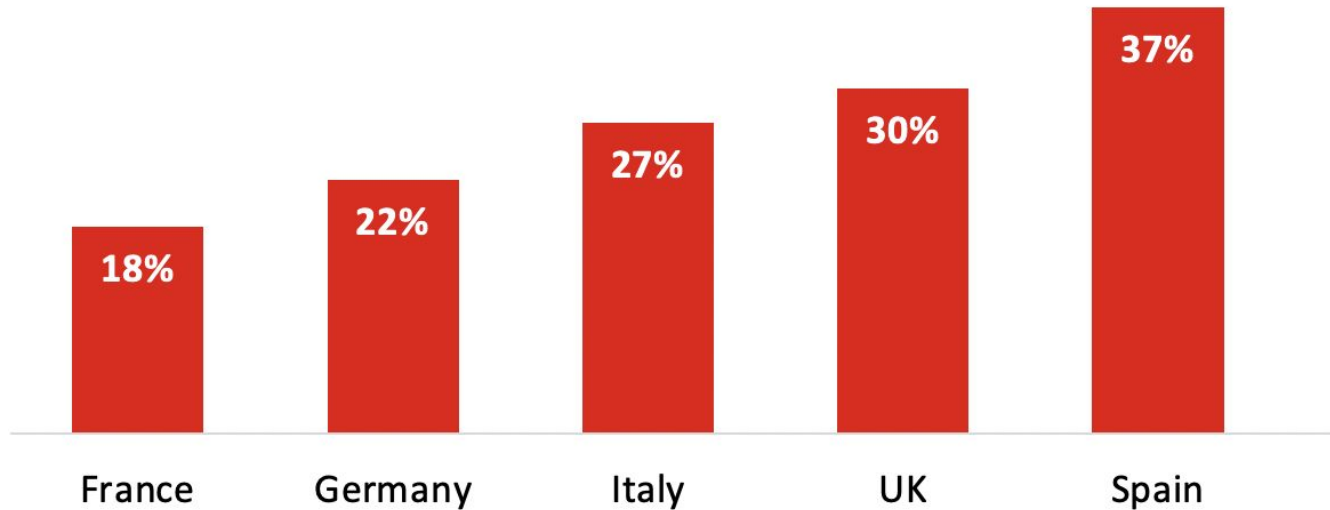
Disappearance of the  
**national identity**



The **end of the world**

# Developed, european countries lack economic optimism

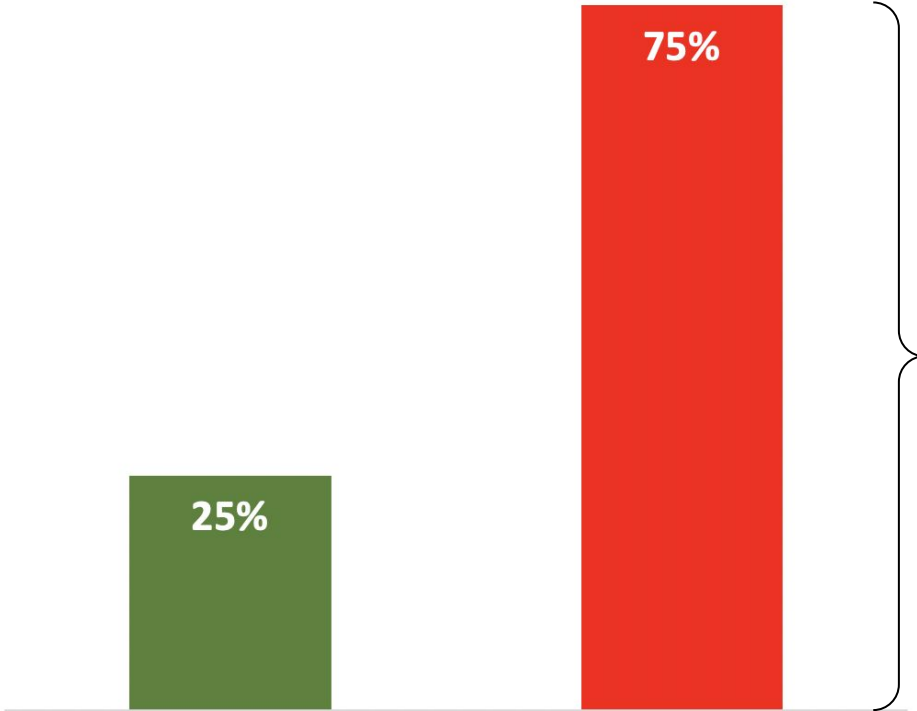
My family will be better off  
in five years time:



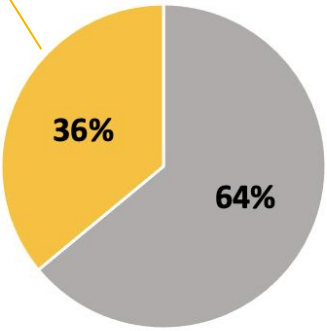
*Edelman Trust  
Barometer, 2022*



# In France, declinism is strong



This decline is irreversible



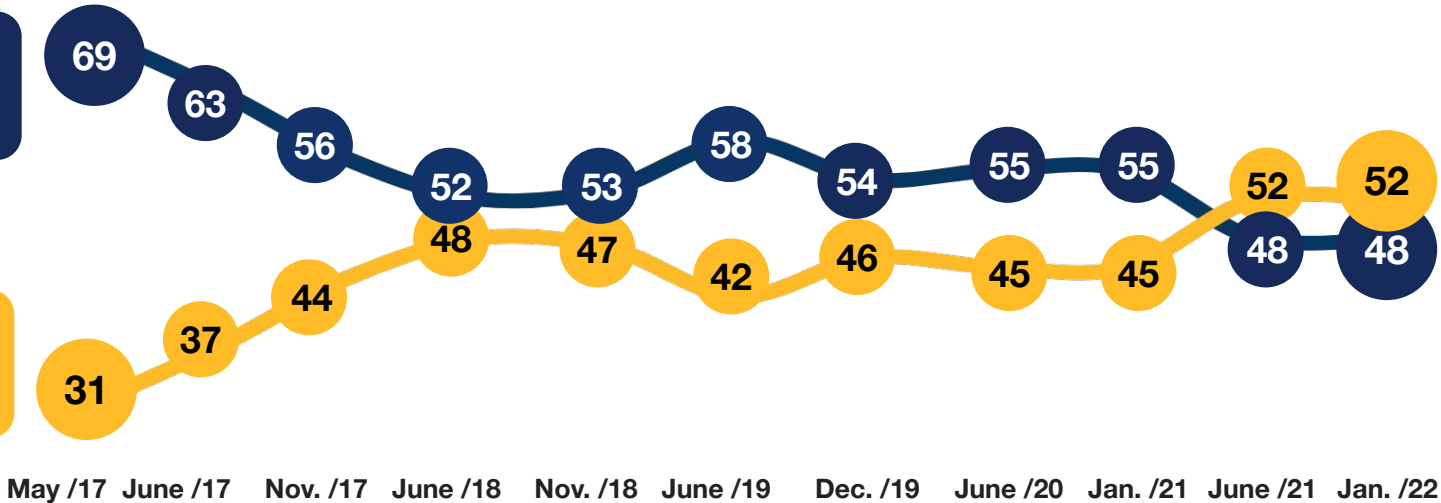


# The identity reflex wins over the majority of French public opinion

Which of these two opinions do you feel closer to? "In the coming years..."

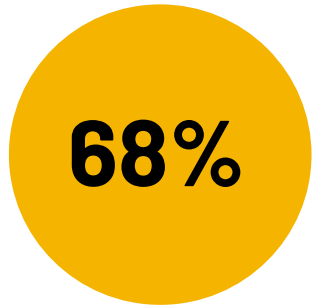
**"The priority is to transform France in depth France to adapt it to the changing world".**

**"The priority is to preserve France as it is in order to protect its identity in a changing world."**



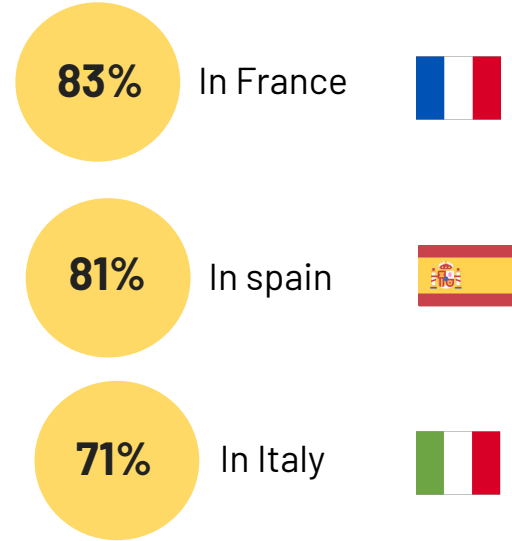



# Climate change is perceived as a serious threat



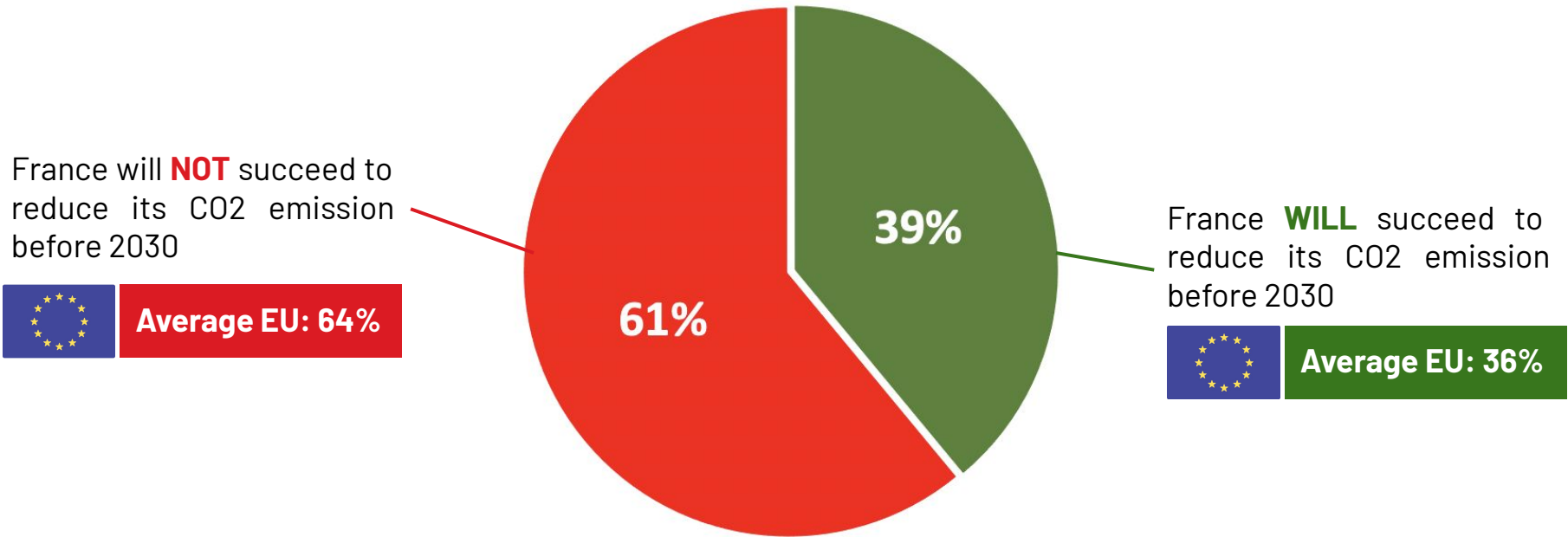
of the global population views **climate change as a major threat** to their country\*

\*2018 figures





# French are pessimistic when it comes to their country's ability to fight climate change

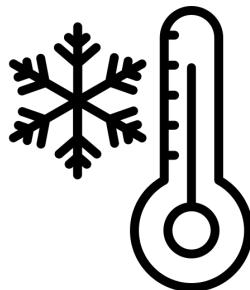


# THE RETURN OF PRIMARY FEARS DUE TO THE UKRAINIAN WAR

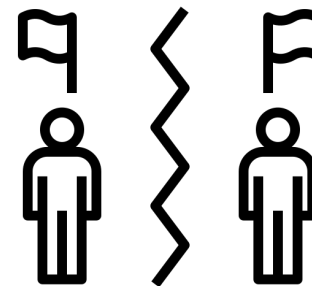
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growing fears linked to the **increase of the cost of living**



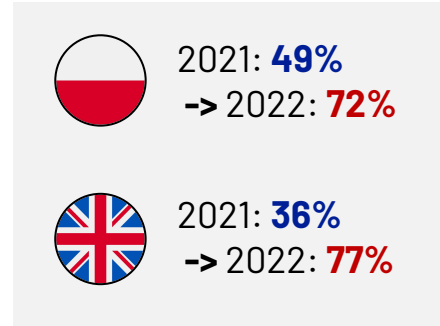
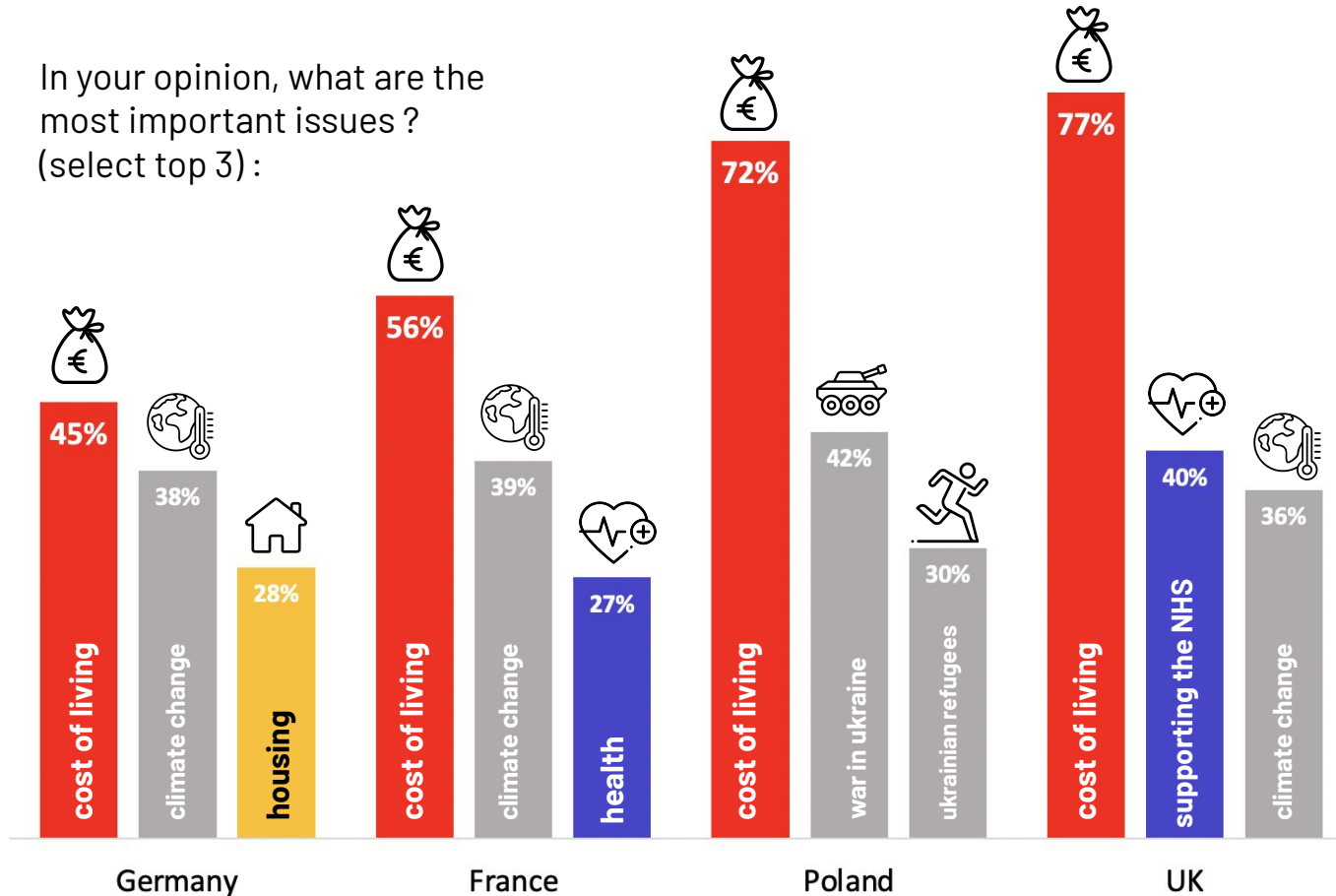
the population worries about the upcoming winter



all this tension would end up in **violence and war**

# growing fear regarding eating, heating, health and housing

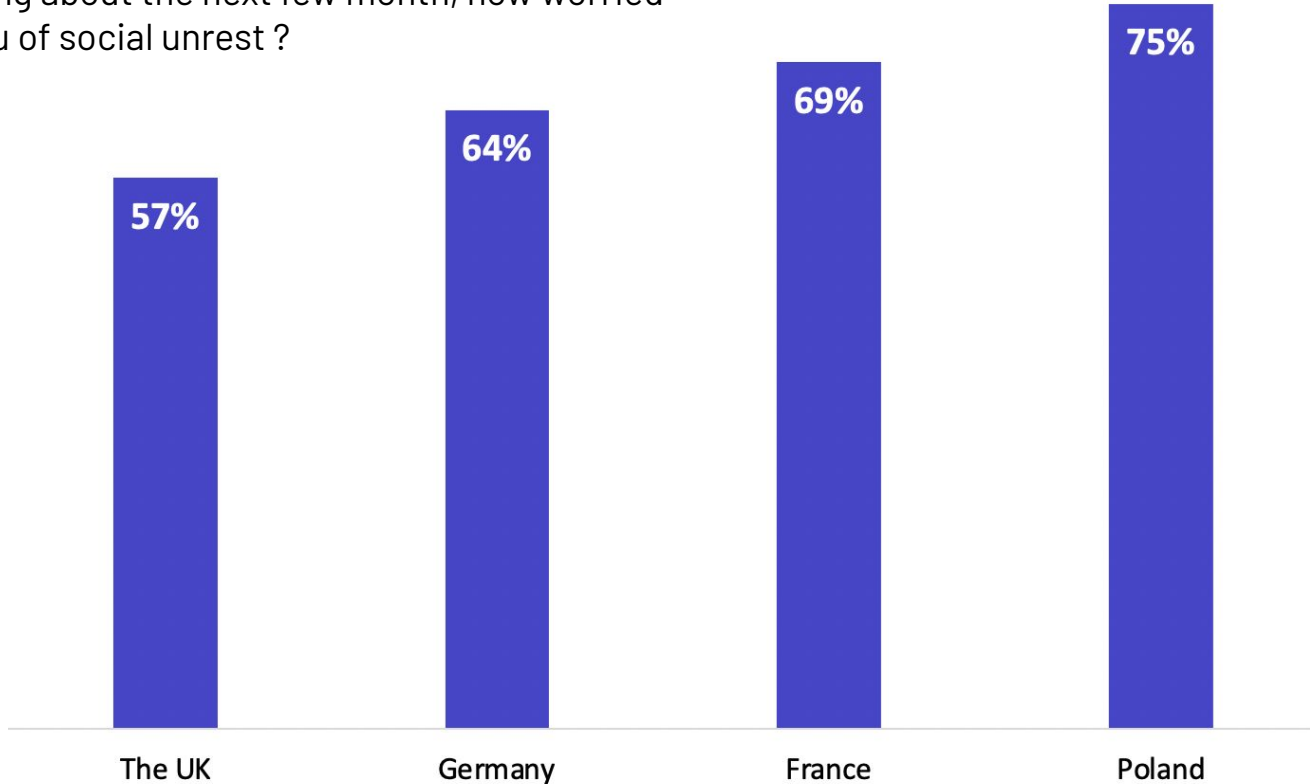
In your opinion, what are the most important issues?  
(select top 3):




More in Common,  
“Navigating the Cost of  
Living Crisis in Europe”,  
2022

# A majority of people are worried about social unrest

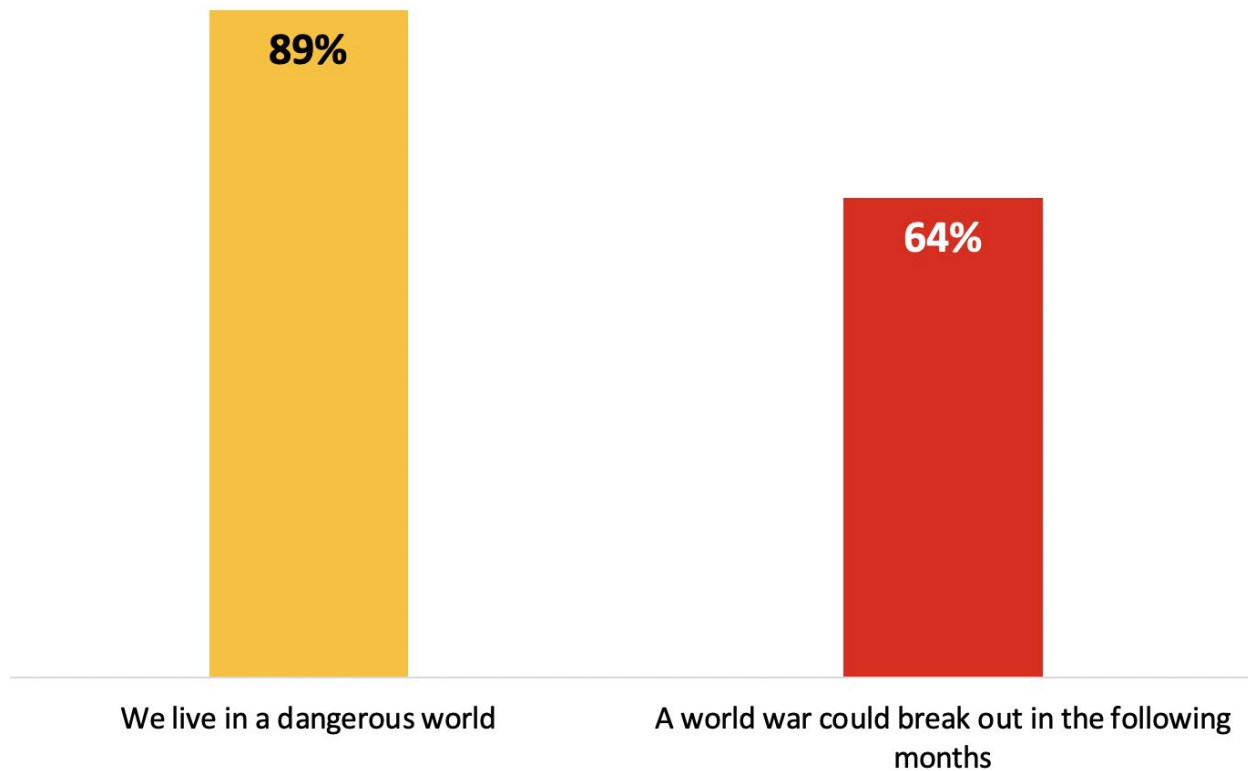
Thinking about the next few months, how worried are you of social unrest?



*More in Common,  
Navigating the Cost of  
Living Crisis in Europe,  
2022*



## $\frac{2}{3}$ of the French people believe that a world war could break out in the following months



# DESPITE THESE FEARS, EUROPE REMAINS ATTRACTIVE

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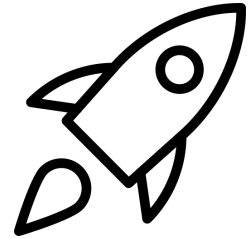
Europe: an  
**economic power**



Europe: an **attractive**  
**land for talents**

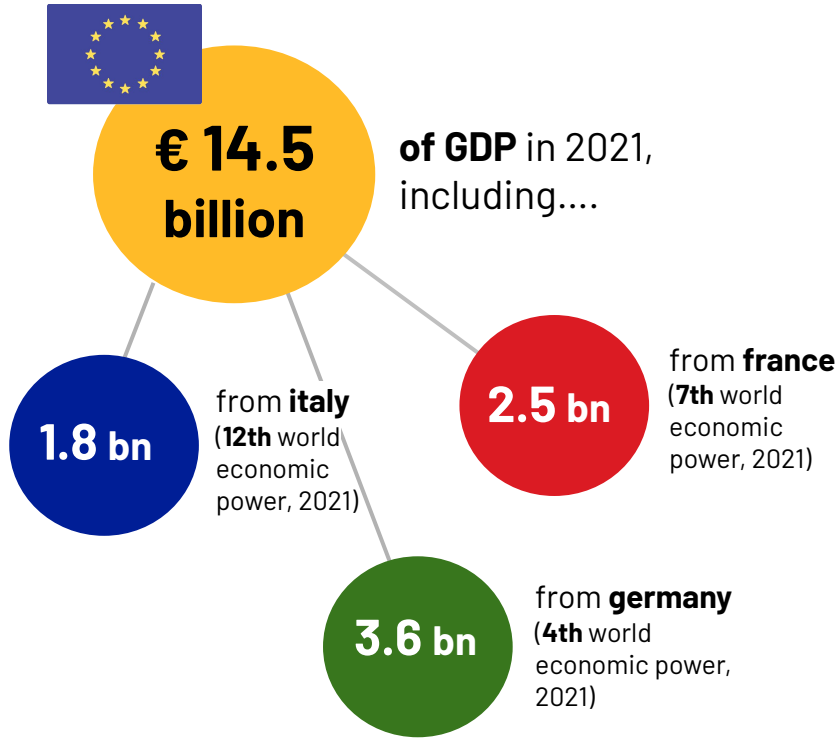


Europe: a **good**  
**place to live**

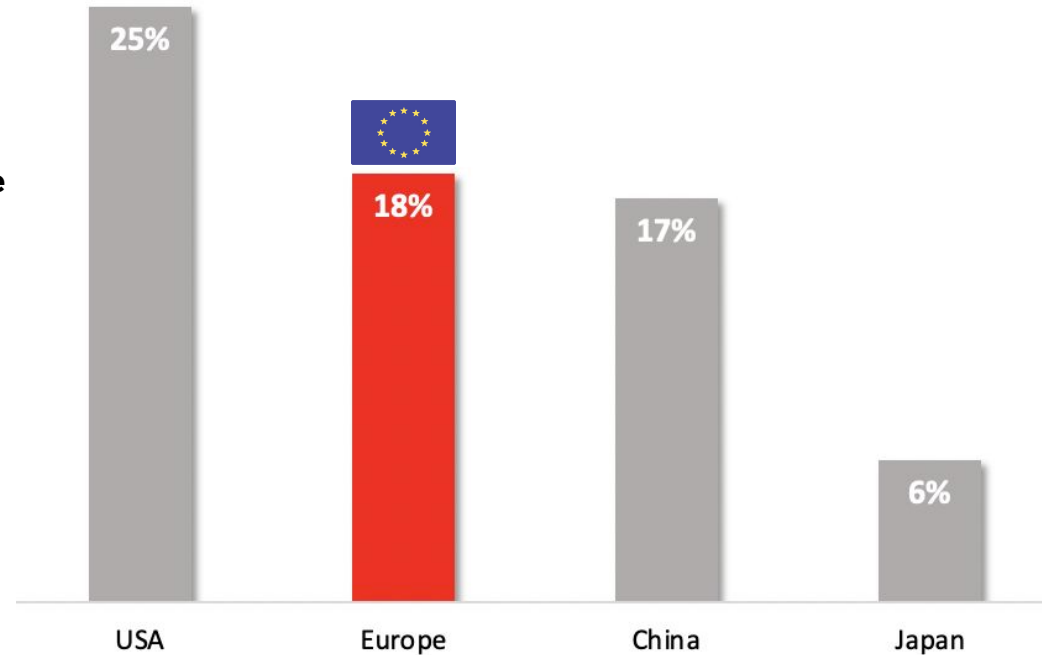


Europe: where  
**innovation** happens

# Europe: an economic power



In 2020, **Europe accounted for 18% of world GDP**, ahead of China and Japan.





# Europe: an attractive land for talents



**15 of the top 20** most attractive countries for talents are **European**, including:



# Europe: a good place to live

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**20 of the top 30 HDI**  
(Human Development Index\*) countries are **European**, including:

\* HDI = GDP + Education + Life expectancy



# Europe: where innovation happens

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**12 of the 20 top** countries with the most **patent** applications are **European**, including:



fears      downgrading  
**decline**      **end of**  
war      **the world**  
Basic needs

long term      **power**  
**prospects**      attractive  
future      innovation  
quality of life

fears      downgrading  
**decline**      end of  
war      the world  
Basic needs

long term      **power**  
**prospects**      attractive  
future      innovation  
**quality of life**

# To sum up about Europe

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**Europe feels worse than it really is:** it faces more a crisis of confidence than a crisis of growth. It has many assets on which it can rebound.

**The challenge for decision-makers is to give back common perspectives** to fractured, distrustful and worried peoples.

**People are ready to transform** but they no longer believe in vertical communication.

**Our conviction:** in a paranoid environment, **a new narrative strategy** must be implemented.

## Our conviction: opinion strategy is a driving force for change

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Adding pressure and noise by using more media no longer works.

Pushing a succession of rational arguments is no longer efficient.

**To convince and earn public opinion's attention, it is necessary to understand what they believe and feel, and propose something that is in deep resonance with it. Something authentic and credible enough that they easily memorize and that they will want to repeat.**



Our conviction : we are in the era of narrative-based transformation

*Narratives developed on the basis of **expert diagnoses of public aspirations.***

*Narratives based on **evidence and memorable actions.***

*Narratives that make **every message authentic and coherent.***

*Narratives that inspire **creativity and promote innovation.***



# The three pillars of the new communication strategy

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## Opinion

understand  
in order to master

## Narrative

narrate  
in order to convince

## Engagement

activate  
in order to engage



An example: video for the Paris automotive summit 2022 (mondial de l'auto)  
PFA: [innovation shared by all](#)



