



RESEARCH WITH GENERAL POPULATION ACROSS THE EU

Top 10 findings: Referendum, Re-negotiation, Restructure

With the UK's EU membership being put to a referendum before the end of 2017, Greece's place within the Eurozone looking increasingly fragile and a rise of Eurosceptic parties questioning the practicality of the Europe machine; FTI Consulting has conducted research to better understand the opinions of the general population at this pivotal moment in the history of the EU. Below are our top 10 findings from five key and very different EU member states.

As summer temperatures soar, Greece's finances evaporate and debates begin to heat up on the UK's EU membership referendum; FTI Consulting conducted research to assess the temperature of public opinion in UK, France, Germany, Sweden & Estonia.

— Dan Healy, Head of Strategy Consulting and Research

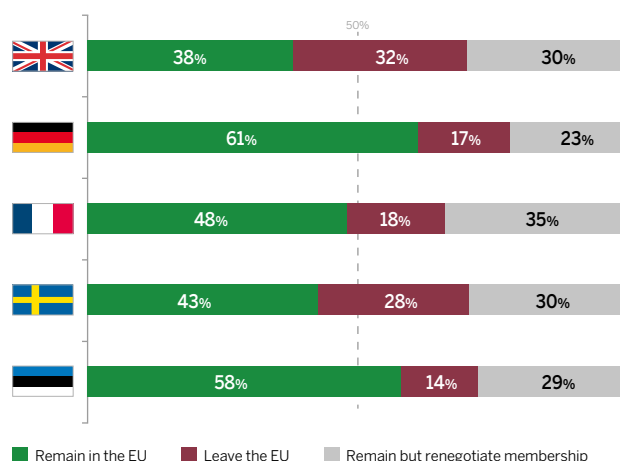
#1. EU Referendum Vote

With the UK Prime Minister currently re-negotiating the UK's membership before an 'in-out' referendum, is this simply a question for the UK or would other countries in the EU such as France and Sweden, who have both seen strong showings for anti-immigration parties, opt for the same if there was a referendum in their country? It seems that whilst 61% of Germans and 58% of Estonians would want to stay in the EU without change, 35% of those in France would be more partial

to vote to remain in if there was an opportunity to follow the UK and re-negotiate terms of its membership (+5% higher than the UK and Sweden).

Graph 1: 3 Option Referendum Result

Q. If there was a referendum on your country's membership with the EU, how would you vote? (Please select one response)

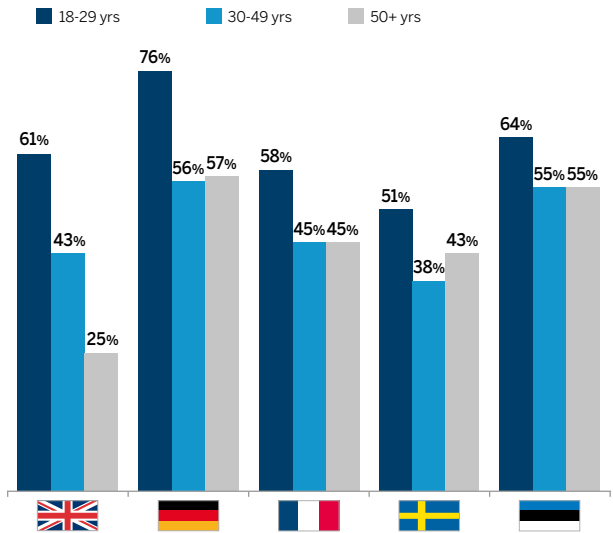


#2. Generation Gap

Driving this desire to remain in the EU is the millennials; who would overwhelmingly vote to keep their countries within the EU. The baby boomers are the more cynical group, particularly in the UK, with just 25% of those who are 50+ years old wanting to remain in the EU, compared to the majority of 18-29 year olds who share this voting intention.

Graph 2: Those voting to ‘Remain in the EU’

Q. If there was a referendum on your country’s membership with the EU, how would you vote? (Please select one response)



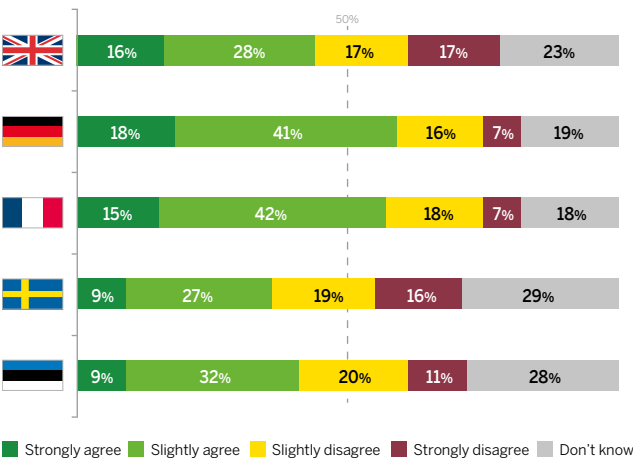
#3. EU Campaigning

Interestingly, 44% of the UK believe that the EU should be able to actively campaign if there was a referendum on a country’s continued membership, much less than in Germany and France where the majority agree they should be allowed.

Graph 3: EU to Defend itself

Q. How strongly do you agree with the following statements? (Please select one columns response for each row)

‘The EU should be able to campaign should a country hold a referendum on their membership’

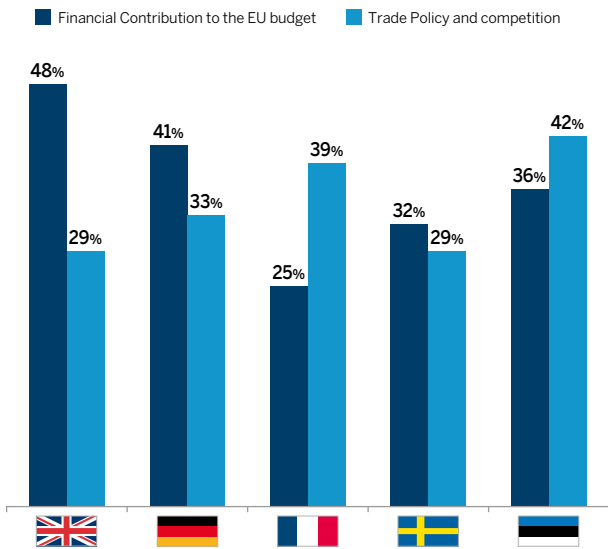


#4. Re-Negotiations

So how can the EU bring back those who are disenfranchised with the current system? Reviewing the financial contribution that each country makes to the EU budget could be a start, with this particularly salient in the UK (48%) and Germany (41%). In contrast, those in France (39%) and Estonia (42%), particularly desire more focus on re-negotiating EU trade policy & competition.

Graph 4: Re-negotiate EU Financial Contribution & Trade Policy and Competition

Q. Which of the following do you think your country should re-negotiate with the EU? (Please select all that apply)



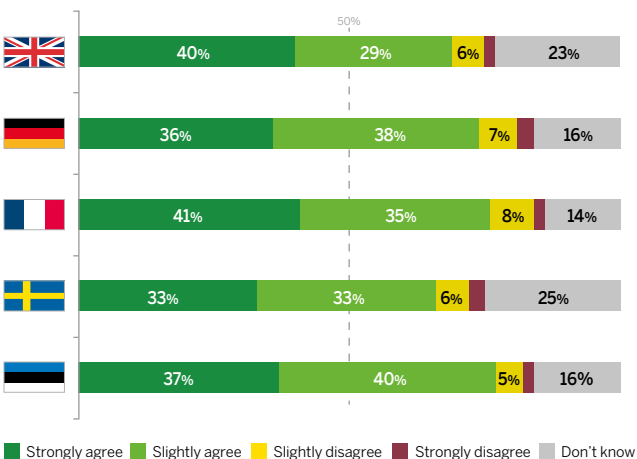
#5. Restructure

Running parallel to this is the belief that the EU should be more efficient, with almost 3 in 4 believing the EU should re-structure in order to reduce its running costs. In particular, France (76%) and Germany (74%) agree most, whereas a quarter of those in the UK and Sweden claim they don’t know.

Graph 5: Restructure to Reduce Costs

Q. How strongly do you agree with the following statements? (Please select one columns response for each row)

‘The EU should re-structure in order to reduce running costs’

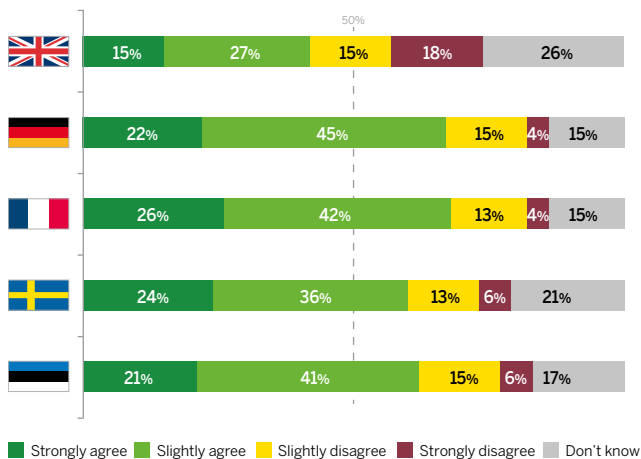


#6. An 'Ever Closer Union'

Unsurprisingly, the UK is the only country where the majority do not agree with the EU's mission of an 'ever closer union' while 1 in 5 in Sweden and Estonia are unsure as to whether an 'ever closer union' is good for their country.

Graph 6: Far Apart or Ever Closer

Q. How strongly do you agree with the following statements?
(Please select one columns response for each row)
'EU's mission of 'ever closer union' across member countries'

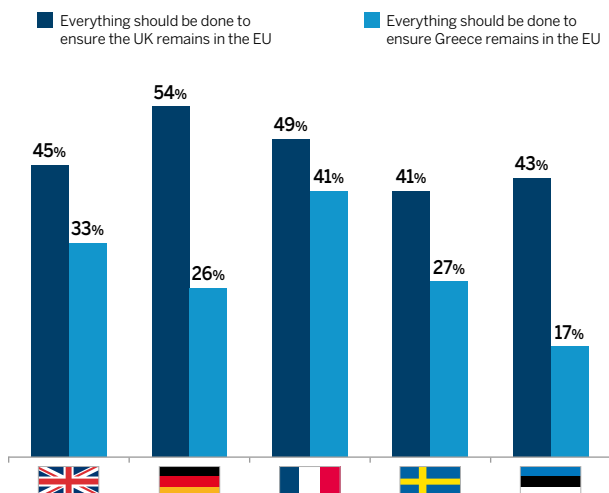


#7. I Want You, but Not You

The 'ever closer union' debate is one that will undoubtedly be used to fuel the fires of the 'Leave the EU' campaign in the UK over the coming months. Whilst a Brexit seems unlikely at this stage, what do other EU countries make of this possibility? 54% in Germany and 49% in France believe that everything should be done to ensure the UK remains in the EU, however, when asked whether the same should be done to ensure a Grexit is avoided; just a quarter of those in Germany and Sweden agree, with Estonia particularly strong with their opinion against Greece with only 17% agreeing.

Graph 7: Those 'Agreeing' with Statements

Q. How strongly do you agree with the following statements?
(Please select one columns response for each row)

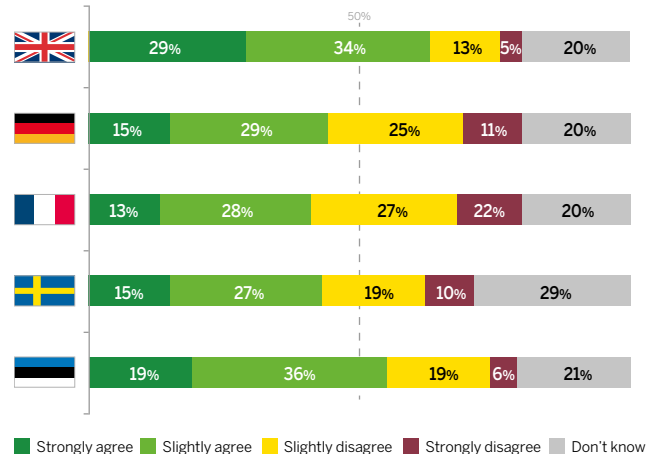


#8. I Know You'll Miss Us, Right?

Closely linked to the prospect of a Brexit is the inference that the EU would be weaker and less influential on the global stage without the UK. This is believed most strongly by 63% in the UK and Estonia (55%), with less than half in Germany (44%), Sweden (42%) and France (41%).

Graph 8: Importance of UK to EU Influence

Q. How strongly do you agree with the following statements?
(Please select one columns response for each row)
'The EU would be weaker and less influential globally without the UK'

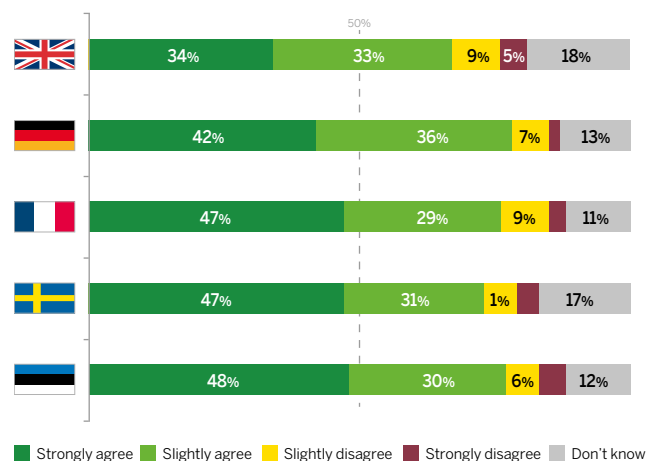


#9. Fear Unites

When it comes to reasons for the EU to remain strong and united, a majority cite threats from extremists as a motivation for the EU to promote global unity to counter these social, financial and economic threats. This belief is agreed most strongly in Estonia, France and Sweden, with the UK most uncertain about their opinion.

Graph 9: Remain Strong to Counter Threats

Q. How strongly do you agree with the following statements?
(Please select one columns response for each row)
'The EU needs to remain strong and united to counter threats from extremists'

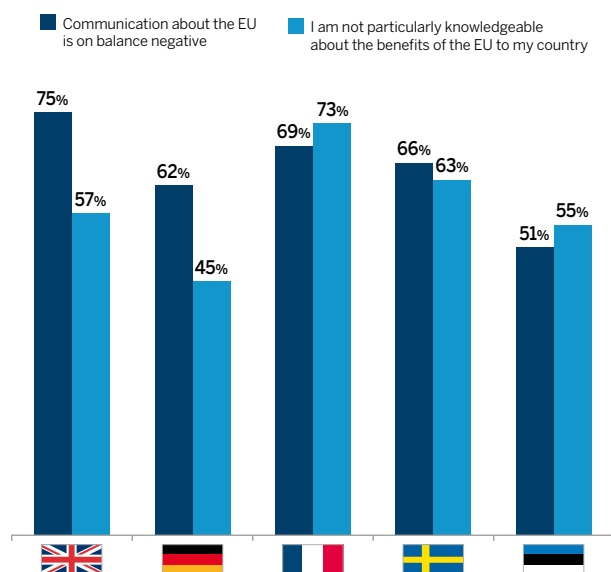


#10. A Lack of Knowledge & Negative Communication

From a communication perspective, the EU has much work to do in tailoring its message in a clear and coherent manner that highlights the benefits it brings to member states. This is emphasised with more than two-thirds in the UK, Germany and France believing the communication they hear is on balance negative, whilst more than half in the UK, France, Sweden and Estonia claim to be not particularly knowledgeable of the EU's benefits to their country.

Graph 10: Lack of Communication on Benefits of EU.

Q. How strongly do you agree or disagree with the following?
(Please select one column response for each row)



RESEARCH METHODOLOGY

This research was conducted by FTI Consulting's Strategy Consulting & Research team in London from 19th to 23rd June 2015, involving n=2,543 respondents across the UK, France, Germany, Sweden & Estonia reflective of the general population and broken down as follows: UK (n=521), Germany (n=505), France (n=509), Sweden (n=504) & Estonia (n=504).

All research was conducted online by FTI Consulting. Further information on the results and methodology can be obtained by emailing dan.healy@fticonsulting.com.

Please note that the standard convention for rounding has been applied and consequently some totals do not add up to 100%.

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