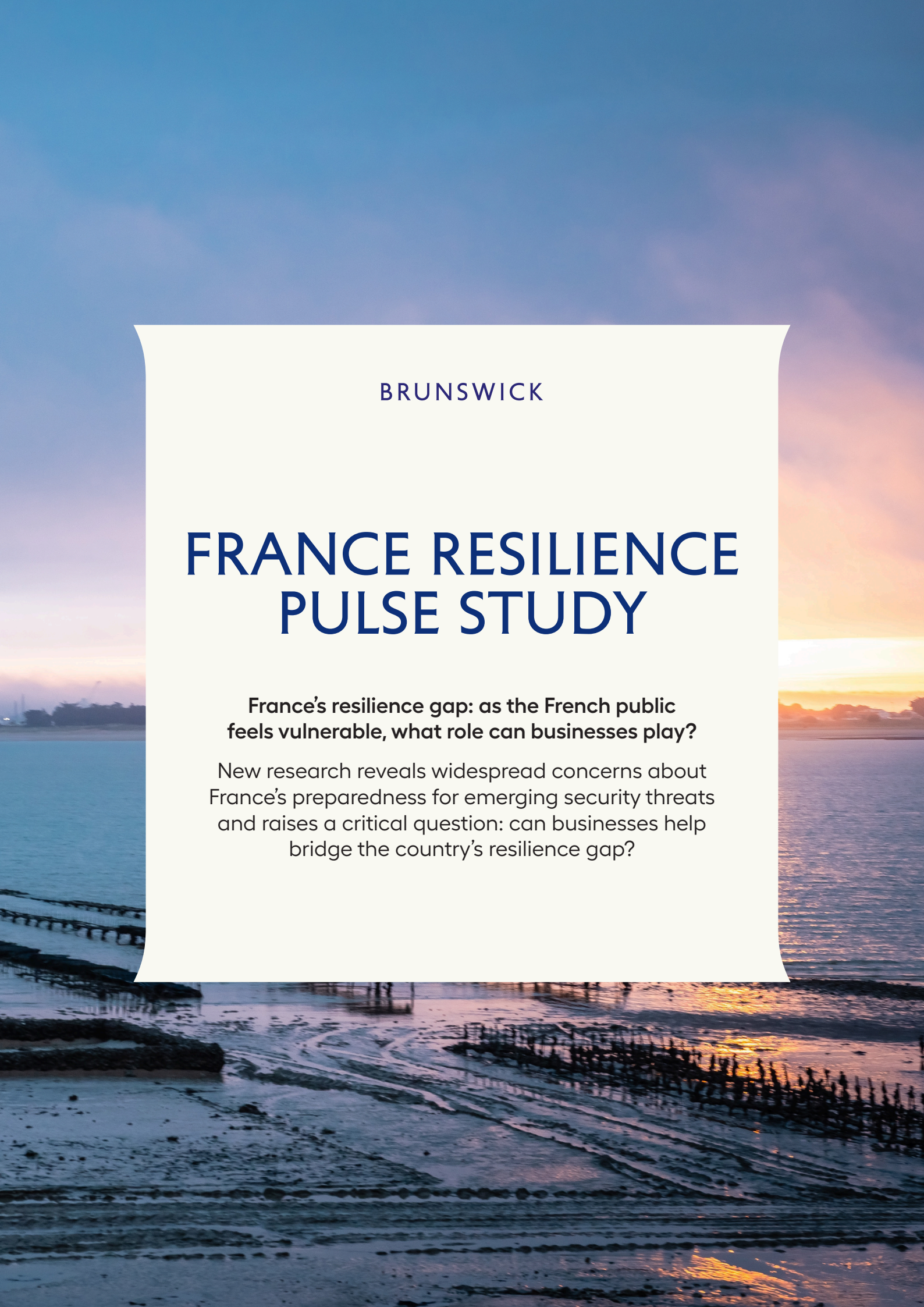


BRUNSWICK

FRANCE RESILIENCE PULSE STUDY

France's resilience gap: as the French public feels vulnerable, what role can businesses play?

New research reveals widespread concerns about France's preparedness for emerging security threats and raises a critical question: can businesses help bridge the country's resilience gap?

EXECUTIVE SUMMARY

France is facing a crisis of confidence in its ability to withstand security threats, economic shocks and political instability. Brunswick Group's latest Resilience Pulse survey reveals widespread concerns about the country's preparedness for future crises, raising a fundamental question: could businesses play a greater role in strengthening France's collective resilience?

The study highlights a significant gap between the threats French people perceive and their confidence in the ability of public institutions and employers to respond effectively.

The Resilience Pulse is a Brunswick Group study conducted online by YouGov among 8,576 adults across four European markets: the UK (n=2,260), France (n=2,017), Italy (n=2,075) and Germany (n=2,224).

Data were weighted to be representative of the adult population (aged 18+) in each country. Fieldwork took place between 24 and 27 April 2026 in Germany and between 10 and 24 September 2026 across the UK, France and Italy. Differences involving Germany may therefore reflect the timing of fieldwork as well as differences between countries.

The findings reflect respondents' perceptions and attitudes rather than objective assessments of preparedness. Results are representative of the individual national adult populations surveyed, not Europe as a whole.

In France, four key findings stand out:

1 **More than three-quarters of French people (76%) believe France is inadequately protected against cyberattacks, highlighting greater concerns about technology-related threats than traditional military threats.**

Disinformation campaigns are another major source of concern, with 65% questioning France's level of protection. This sense of vulnerability is compounded by an important information deficit: 65% of respondents report feeling insufficiently informed about the security threats facing the country, the highest proportion among the four European countries surveyed.

2 **The level of national debt is a major source of concern for French people (76%), while expectations for the 2027 presidential election's impact on economic resilience are divided.**

We see that 26% anticipate a positive impact, 27% a negative impact and 25% no impact. Despite widespread concerns about the country's preparedness for future crises, there is limited willingness to finance greater resilience, with just 14% supporting higher taxes to fund additional security measures.

3 **Only one in three French employees (34%) believe their employer is sufficiently prepared to protect employees from security threats.**

Yet, 44% are confident that their employer is investing sufficiently in security, revealing a small gap between confidence in corporate investment and perceptions of actual preparedness. This suggests that businesses have an opportunity to build trust by making their resilience efforts more visible and tangible.

4 **Energy (35%), defence (29%) and food & agriculture (29%) are the sectors French people see as contributing the most to national resilience.**

By contrast, only 16% identify technology (e.g. software and electronic devices) as a key contributor. These findings suggest that the public primarily associates resilience with the ability to maintain access to essential goods and services.

Taken together, these findings reveal a significant challenge for France: widespread concerns about national preparedness, limited personal willingness to finance greater protection and low confidence in employers' ability to withstand security threats. As confidence in the State's ability to protect citizens comes under pressure, could businesses increasingly be expected to step in? And if so, are they ready to take on this responsibility?

For corporate leaders, the implications could be far-reaching. Strengthening resilience will require more than investing in security and operational preparedness. It will also mean demonstrating how their organisations can protect employees, maintain essential services and contribute to wider societal stability, while building the trust needed to navigate future crises.

FRANCE IS SEEN AS MORE PROTECTED AGAINST CONVENTIONAL THREATS THAN THOSE OF TODAY AND TOMORROW

PUBLIC CONFIDENCE IN NATIONAL PROTECTION IS GENERALLY LOW

Against a backdrop of growing security challenges, French people express significant doubts about their country's ability to protect them against security threats.

Six in ten respondents (60%) say France is inadequately protected by the government from security threats, compared with 35% who say it is well protected. This widespread lack of trust raises broader questions about the country's ability to anticipate and respond effectively to future crises.

Concerns are particularly pronounced when it comes to emerging and less conventional security threats. Cyberattacks are perceived as the country's greatest security vulnerability, with 76% believing France is inadequately protected, followed by disinformation campaigns (65%) and acts of sabotage (59%).

By contrast, concern is lower when it comes to more traditional security threats: 47% believe France is inadequately protected against terrorism, dropping to 40% for military threats or armed conflict.

This contrast suggests that the French may feel more reassured by the country's experience in confronting established security threats, while perceiving it as less equipped to address newer, more diffuse threats that are harder to anticipate, identify and contain.

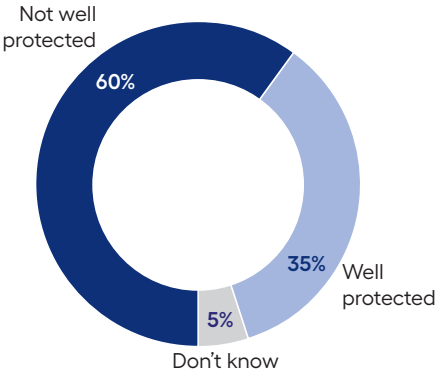
The prominence of cybersecurity concerns may also reflect heightened public awareness following recent high-profile incidents, notably a cyberattack targeting France's Directorate General of Public Finances (DGFiP) in the summer of 2026, which reportedly exposed sensitive data relating to hundreds of thousands of individuals and businesses.

A CRISIS OF TRUST FUELLED BY AN INFORMATION DEFICIT

The survey also reveals that the lack of public confidence in the country's ability to face new security threats is compounded by a significant information deficit. Nearly two-thirds of French people (65%) feel insufficiently informed about the security threats facing their country, the highest proportion among the four European countries surveyed.

The relationship between information and perceived protection is particularly striking: among those who believe France is inadequately protected, 77% also feel poorly informed, compared with 43% among those who consider the country well protected overall. These findings highlight the close relationship between information and confidence, suggesting that greater transparency about security measures could play an important role in strengthening trust in preparedness.

France's perception of protection against different security threats

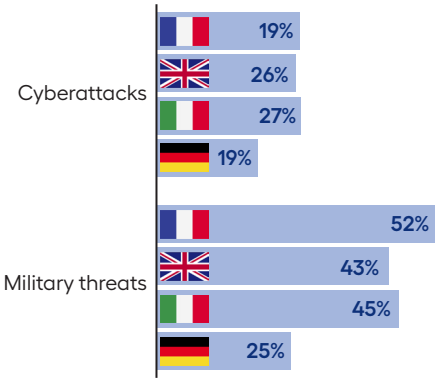


Base: 2,017 adults in France

European comparison of perceived levels of national protection against security threats

In France cyberattacks are seen as the clearest vulnerability, while military threats are the only area where a majority say France is protected.

Showing % who say their country is well protected against each threat type.



Base: all respondents (UK n=2,260; FR n=2,017; DE n=2,224; IT n=2,075)

AHEAD OF THE 2027 PRESIDENTIAL ELECTION, THE FRENCH DOUBT THE COUNTRY'S ABILITY TO REINFORCE ITS ECONOMIC RESILIENCE

ECONOMIC AND POLITICAL UNCERTAINTY ARE CASTING A SHADOW OVER THE 2027 PRESIDENTIAL ELECTION

Beyond security threats, the study reveals that economic and political uncertainty have become central to how French citizens perceive resilience.

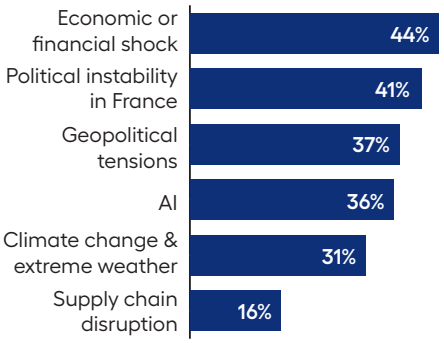
When asked to identify the greatest risks to businesses operating in France, respondents rank economic or financial shocks first (44%), followed closely by domestic political instability (41%).

The prominence of political instability is particularly striking ahead of the 2027 presidential election, which does not appear to inspire strong expectations of renewed economic stability. Indeed, only 26% expect the presidential election to have a positive impact on economic resilience, compared with 27% who expect a negative impact and 25% who expect no impact.

This is reinforced by the considerable uncertainty about the country's economic trajectory: more than three-quarters of French people (76%) are worried about the level of national debt, including 31% who are very worried. Far from being a distant macroeconomic concern, the national debt is shown to be a real source of anxiety for French citizens, adding to broader concerns about France's economic stability and resilience.

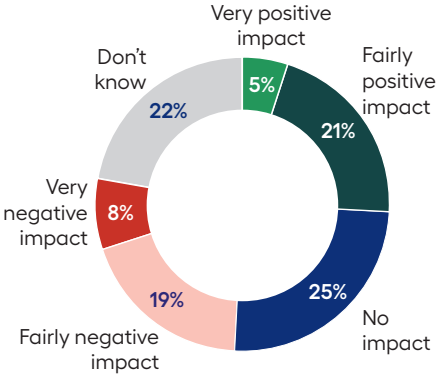
Rather than being perceived as an opportunity to restore confidence, the presidential election seems to be met with a degree of resignation and little conviction that its outcome will fundamentally strengthen the country's resilience and ability to withstand future crises.

Risks to the resilience of French business
Showing % of those who chose each risk when asked to select up to three



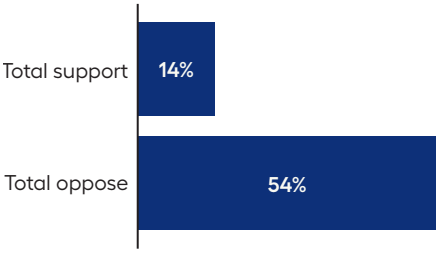
Base: 2,017 adults in France

Expected likely impact of the presidential election outcome on France's economic resilience
Showing % who chose each option



Base: 2,017 adults in France

Support for paying higher taxes to fund measures that strengthen France's security and resilience
Showing % that chose each option



Base: 2,017 adults in France

DESPITE THEIR CONCERNS ABOUT FRANCE'S RESILIENCE, THERE IS LIMITED WILLINGNESS AMONG FRENCH CITIZENS TO INVEST IN STRENGTHENING IT

Widespread public concern about security threats and public debt does not translate into a strong willingness to shoulder the financial burden of strengthening France's resilience. When asked whether they would support higher taxes to fund measures such as civil defence or infrastructure protection, only 14% of French respondents say they would. Support for higher taxes is also the lowest among the four markets surveyed, compared with 17% in Germany, 21% in Italy and 28% in the UK.

And when presented with alternative funding mechanisms, 39% of those in France reject all the proposed options, while just 28% would accept reallocating existing government spending.

There is therefore a fundamental tension: French people recognise the need for greater protection but have limited willingness to bear the financial cost. This raises an important question around the financing of resilience: should the responsibility for strengthening national resilience be only that of the State? In the context of strained public finances, should businesses share that burden?

GENERATIONAL DIFFERENCES SHAPE BOTH PERCEPTIONS OF RESILIENCE AND ATTITUDES TOWARDS PAYING FOR IT

Generational differences emerge as a defining feature of how the French perceive resilience and their willingness to finance it.

Younger French people are significantly more confident in the country's ability to withstand security threats, with 57% of 18-29-year-olds considering France adequately protected, compared with just 27% of those aged 50-64.

In addition, younger adults are considerably more willing to contribute financially to national resilience: 28% of 18-29-year-olds support paying higher taxes, compared with just 9% of those aged 50-64, a threefold difference.

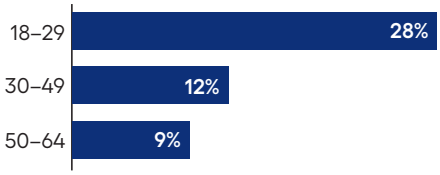
> "Businesses cannot afford to wait for political stability to return before strengthening their resilience. It is a strategic management imperative and quite frankly a prerequisite for safeguarding their future. In an environment of economic uncertainty and strained public finances, business leaders must ask themselves a difficult question: are we truly prepared to withstand the next crisis and protect those who depend on us? If the answer is no, the time to act is now."
>
> Tristan Lemonnier

This contrast raises questions about how competing generational expectations will shape political decisions on security, public spending and long-term resilience, particularly in the context of an ageing electorate.

For policymakers and businesses alike, identifying and understanding these different generational attitudes will be important in shaping approaches to resilience that can command support across society.

Support for paying higher taxes by age group

Showing % total support



Base: 2,017 adults in France. 18-29 year olds (n=205), 30-49 year olds (n=510), 50-64 year olds (n=622)



BUSINESSES COULD PLAY A GREATER ROLE IN NATIONAL RESILIENCE, BUT THEIR OWN PREPAREDNESS IS IN QUESTION

FRENCH EMPLOYEES HAVE THE LOWEST CONFIDENCE IN THEIR EMPLOYERS' PREPAREDNESS TO FACE SECURITY THREATS AMONG THE FOUR COUNTRIES SURVEYED

French employees remain largely unconvinced of their employers' ability to protect them against security threats[1]. Only 34% of French employees believe their employer is adequately prepared to deal with security threats, compared with 48% who consider it inadequately prepared. France records a lower level of perceived preparedness of companies among the four European countries surveyed, behind Italy (37%), the UK (40%) and Germany (44%). It is particularly striking and suggests that French businesses face a greater challenge in convincing their workforce of their ability to withstand crises.

The findings also reveal a significant information deficit with only 37% of French employees feeling sufficiently informed about the security measures implemented by their employer, while a majority (53%) say they are poorly informed. Here again, France ranks among the lower of the four European markets surveyed.

Yet, interestingly, among employees who feel well informed about their employer's security measures, 70% believe their company is adequately prepared, compared with just 15% of those who feel poorly informed. The relationship between information and confidence is here particularly revealing.

A PARADOX: EMPLOYEES TRUST THAT COMPANIES ARE INVESTING IN SECURITY BUT DOUBT THEY ARE PREPARED

Despite doubts about adequate corporate protection in the face of new security threats, the Resilience Study reveals an interesting paradox among employees: while only 34% believe their employer is adequately prepared, 44% are confident that their employer is investing sufficiently in security measures, compared with 38% who are not.

France ranks second among the four countries surveyed on this measure, behind Germany (50%), but ahead of the UK (39%) and Italy (35%).

This discrepancy suggests that French employees are somewhat more positive about their employers' investment in security measures than their overall preparedness to respond to crises, raising questions about how effectively these investments translate into perceived readiness. This suggests that the measures put in place by businesses to protect organisational resilience and safeguard employees may not be sufficiently visible.

> "Resilience cannot remain an invisible investment. Companies must be able to demonstrate what they are doing, why it matters and how it will protect their people when a crisis strikes."
>
> Nicolas Bouvier

Perceptions of employer preparedness, awareness of security measures, and confidence in employer's security investments amongst employees
Showing % who chose each option



Base: 971 full-time or part-time employed adults in France

1 Questions on the opinions of employees are based on the responses of the 971 employed people in the main sample of 2,017

FRENCH PEOPLE LOOK TO KEY SECTORS TO STRENGTHEN NATIONAL RESILIENCE

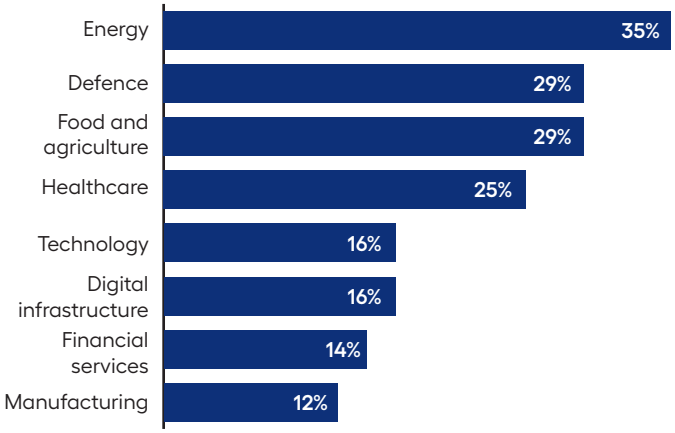
The French public sees some business sectors as having a greater role to play than others in strengthening national resilience.

Energy (35%), defense (29%) and food and agriculture (29%) are identified as the sectors with the greatest role to play, followed by healthcare (25%). By contrast, technology (e.g., software and electronic devices) and digital infrastructure (e.g. data centres, cloud infrastructure, data storage) (16% each), financial services (14%) and manufacturing (12%) rank considerably lower. Interestingly, some sectors ranking lower are also perceived as particularly dependent on other countries, with manufacturing, technology and digital infrastructure also seen as having relatively limited autonomy[2].

These findings suggest that, when faced with potential crises, the French primarily associate resilience with the ability to maintain access to essential goods and services and ensure the continuity of everyday life. They also highlight the particular expectations placed on businesses operating in these critical sectors, raising broader questions about their role alongside the State in strengthening national resilience.

French people are more likely to think key sectors have the greatest role to play in strengthening France's resilience

Showing % who chose each sector when asked to select up to three options



Base: 2,017 adults in France

2 Respondents rated sectors on perceived level of autonomy only if they chose them as a key sector to France's resilience at the previous question. So, all sectors were not rated on levels of autonomy by all respondents.



CONCLUSION

Brunswick Group's latest Resilience Pulse survey for France reveals a profound sense of vulnerability among the French people, who seek greater security and reassurance about the measures in place to protect them against new security threats.

The findings also highlight a striking paradox. While French employees have relatively limited confidence in their employers' preparedness for security threats, they are more positive about whether their employers are investing sufficiently in security measures. This gap between perceptions of investment and preparedness suggests that businesses still have work to do to demonstrate their ability to protect employees when a crisis strikes.

The wider public also identifies several business sectors, particularly energy, defence and food & agriculture, as essential contributors to national resilience.

In a context where confidence in the State's ability to protect citizens from new security threats is under pressure, companies with the resources, capabilities and expertise to strengthen resilience could increasingly become trusted points of reference for protection and stability.

However, this potential role must be considered in the specific context of France, where the place of business and capital in society has long been a subject of public and political debate.

This situation creates both an opportunity and a challenge for corporate leaders. Becoming credible contributors to collective resilience will require more than financial investments or operational preparedness. Companies will need to demonstrate how they protect employees, maintain essential services and contribute to wider societal stability, while communicating transparently about their commitments and capabilities. Trust will depend not only on what businesses say, but on their ability to deliver on their commitments.

The ultimate question is therefore not only whether businesses are ready to assume greater responsibility for the resilience of society itself, but also how they can earn the trust and legitimacy needed to fulfil that role.

> "Resilience cannot be treated as an internal management matter or a box-ticking exercise. It requires companies to challenge their assumptions, anticipate emerging threats and understand what employees, investors and society will expect from them when a crisis strikes. For business leaders, the challenge is not only to identify vulnerabilities and prepare for difficult scenarios, but also to demonstrate their preparedness and build the trust they will need long before it is put to the test."
>
> Nicolas Bouvier

> "Businesses will increasingly be judged not only on their financial performance, but on their ability to withstand disruption, protect employees and maintain the services people rely on. For corporate leaders, this means making resilience a strategic priority, embedded in investment decisions, governance and long-term planning. Those who fail to prepare risk discovering that the cost of inaction and unpreparedness extends far beyond the immediate impact of a crisis, affecting not only their business but also the wider society that depends on them."
>
> Tristan Lemonnier

OUR EXPERTS



Nicolas Bouvier

Partner, Paris

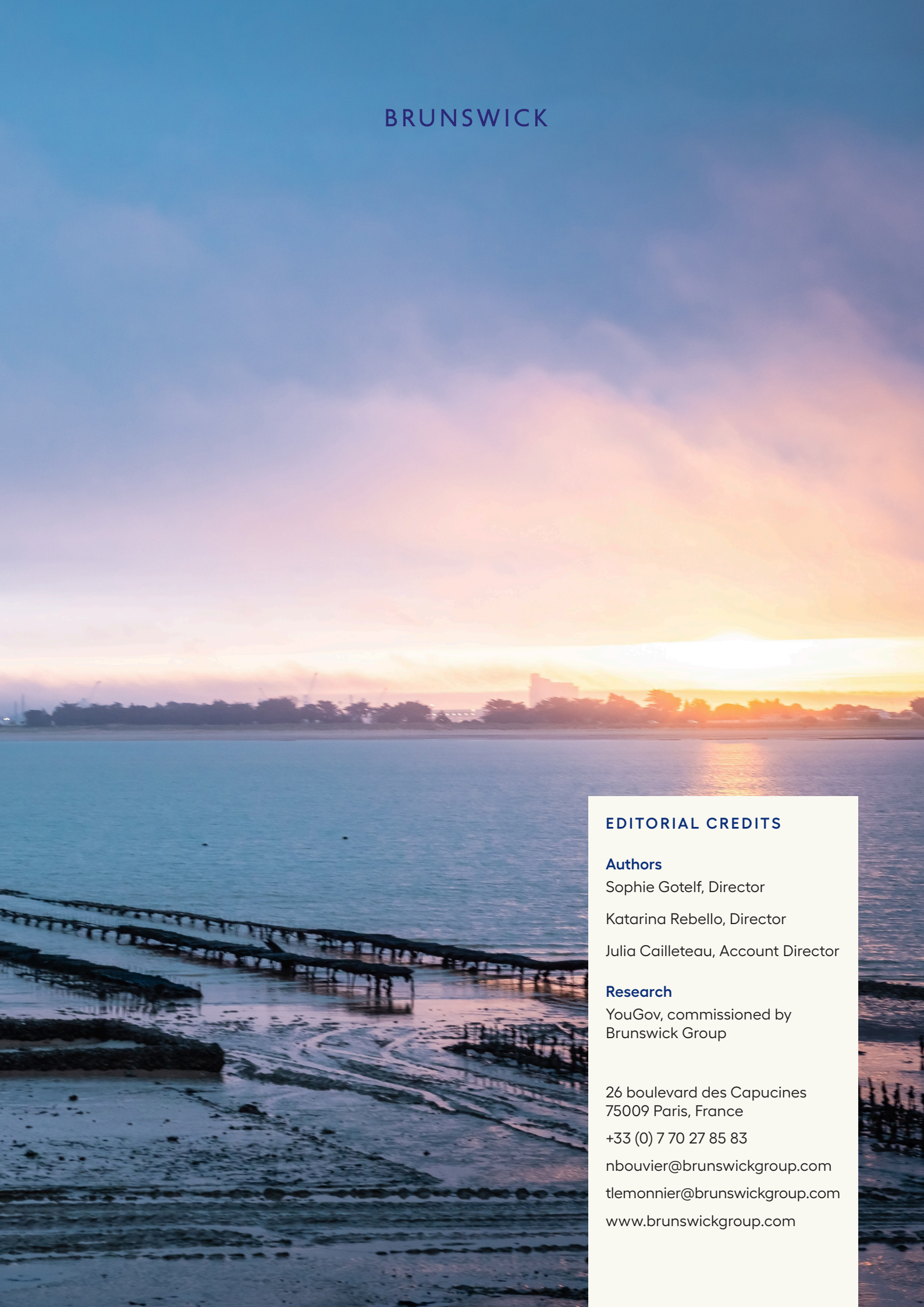
Nicolas has senior expertise in public affairs for issue campaigns and regulatory engagement, in litigation and crisis communication, and in strategic communications. He has advised clients in a wide variety of industries, namely agro-food and retail, energy and utilities, technology and tourism.



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Partner, Paris

Tristan advises organisations on public affairs, strategic communications and advocacy, with deep experience supporting clients through complex, high-stakes situations. He specialises in crisis and restructurings, and has led high-profile projects across France and Europe.



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