European Commission

Standard Eurobarometer 80
Autumn 2013

PUBLIC OPINION IN THE EUROPEAN UNION

REPORT

Fieldwork: November 2013

This survey has been requested and co-ordinated by the European Commission, Directorate-General for Communication.

http://ec.europa.eu/public_opinion/index_en.htm

Standard Eurobarometer 80 / Autumn 2013 – TNS opinion & social

Eurobarometer

Standard Eurobarometer 80
Autumn 2013

Public opinion in the European Union

Survey conducted by TNS opinion & social at the request of the European Commission,
Directorate-General Communication

Survey coordinated by the European Commission,
Directorate-General Communication
(DG COMM "Strategy, Corporate Communication Actions and Eurobarometer" Unit)

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INTRODUCTION

This Standard Eurobarometer survey was carried out between 2 and 17 November 2013[1] in 34 countries and territories: the 28 Member States of the European Union[2], the five candidate countries (the Former Yugoslav Republic of Macedonia, Turkey, Iceland, Montenegro and Serbia) and the Turkish Cypriot Community in the part of the country not controlled by the government of the Republic of Cyprus.

The previous Standard Eurobarometer survey of spring 2013 (EB79) was characterised by the relative stability of the indicators regarding perceptions of the economic situation. However, expectations for the year ahead were less pessimistic than in the previous survey.

A few days before the launch of this survey, the European Commission had published its autumn 2013 economic forecasts[3], which predicted GDP growth in H2 2013 of 0.5% compared with the same period of 2012, representing zero GDP growth for 2013 in the EU and -0.4% in the euro area. In 2014, economic growth is expected to reach 1.4% in the EU and 1.1% in the euro area. Unemployment figures were published on 31 October 2013[4]. In September 2013, the EU28 unemployment rate was unchanged since August 2013 but had increased since September 2012, from 11.6% to 12.2% in the euro area and from 10.6% to 11% in the EU28.

The second half of 2013 was marked by the EU-Canada free trade agreement and the beginning of negotiations between the EU and the United States with a view to creating the world's largest free trade agreement. In addition, the European institutions reached an agreement to put in place a single supervisory mechanism (SSM) intended to supervise banks and other credit institutions and constituting the first "pillar" of European banking union.

In September 2013, an agreement was concluded on the last aspects of the reform of the common agricultural policy (CAP): the post-2013 CAP will give priority to protecting the environment, ensuring a fairer distribution of EU funds and helping farmers to deal with the market challenges they are facing.

At the beginning of October 2013, a boat carrying migrants sank off the coast of the Italian island of Lampedusa, causing the death of more than 300 asylum seekers. This tragedy abruptly focused debates within the EU on European immigration policy.

Since the Standard Eurobarometer survey of 2013 (EB79), national elections have been held in Germany, Austria, Luxembourg and the Czech Republic.

At the time of the fieldwork for the survey, negotiations were ongoing in each of these countries on the subject of the composition of coalition governments.

[1] Please consult the technical specifications for details of the exact dates of the interviews in each country.
[2] This is the first Standard Eurobarometer survey since Croatia joined the EU on 1 July 2013. The EU28 results in this report therefore represent the weighted average for the 28 Member States.
[3] http://ec.europa.eu/economy_finance/eu/forecasts/2013_autumn_forecast_en.htm, published on 5 November 2013.
[4] http://epp.eurostat.ec.europa.eu/cache/ITY_PUBLIC/3-31102013-BP/EN/3-31102013-BP-EN.PDF

The full report of the Standard Eurobarometer 80 survey consists of several volumes. The first volume presents the main public opinion trends in the European Union. Four further volumes present the opinions of Europeans on other themes: European citizenship; the financial and economic crisis; the Europe 2020 strategy; and media use in the European Union. This volume covers the state of public opinion in the European Union.

This volume devoted to the main public opinion trends in the European Union is divided into three parts. The first part focuses on the personal, economic and political aspects of life in the European Union as perceived by its citizens. In it we examine the financial and personal situation of citizens; their views on the economic situation at national and European levels; their main concerns; and their expectations for the future. This volume also explores the interest of citizens in politics and their views on the direction in which things are going in their country and in the European Union, while analysing the extent to which citizens trust the institutions.

The second part of the report presents the main indicators measuring perceptions of the image of the European Union and its institutions and their respective trust ratings. First, we examine to what extent Europeans feel attached to the European Union. Then, the report examines the extent to which Europeans are familiar with the European institutions and the EU and how far they trust them, before examining their knowledge of the EU. It then analyses their views on the way democracy works and the extent to which their personal and national interests are taken into account by the European Union. This part of the report also explores the attitudes of Europeans to globalisation.

The third part of the report begins by analysing how far Europeans support various European policies, before examining their views on the main objectives of European integration, not only as they see them but as they would like them to be. Lastly, we analyse opinions about the European Union's future.

As these questions were asked during the previous Standard Eurobarometer surveys it is possible to analyse opinion trends.

The general analysis and the socio-demographic analyses are based on the results at the level of the average of the 28 Member States. This average is weighted so that it reflects the population of each Member State. The averages for the previous surveys represent the results obtained in all the Member States of the European Union, as it was composed at the time the survey was conducted.

The methodology used is that of the Standard Eurobarometer surveys of the Directorate-General Communication ("Strategy, Corporate Communication Actions and Eurobarometer" Unit)[5]. A technical note on the interviewing methods of the institutes of the TNS opinion & social network is attached to this report. This note also specifies the confidence intervals[6], which are used to assess the accuracy of the results of a survey, according to the size of the sample interviewed in relation to the total size of the population studied.

The abbreviations used in this report correspond to:

ABBREVIATIONS			
BE	Belgium	LV	Latvia
BG	Bulgaria	LU	Luxembourg
CZ	Czech Republic	HU	Hungary
DK	Denmark	MT	Malta
DE	Germany	NL	The Netherlands
EE	Estonia	AT	Austria
EL	Greece	PL	Poland
ES	Spain	PT	Portugal
FR	France	RO	Romania
HR	Croatia	SI	Slovenia
IE	Ireland	SK	Slovakia
IT	Italy	FI	Finland
CY	Republic of Cyprus*	SE	Sweden
LT	Lithuania	UK	United Kingdom
CY (tcc)	Turkish Cypriot Community	EU28	European Union – weighted average for the 28 Member States
TR	Turkey	Euro area	BE, FR, IT, LU, DE, AT, ES, PT, IE, NL, FI, EL, EE, SI, CY, MT, SK
MK	Former Yugoslav Republic of Macedonia**	Non-euro area	BG, CZ, DK, HR, LV, LT, HU, PL, RO, SE, UK
IS	Iceland		
ME	Montenegro		
RS	Serbia		

* Cyprus as a whole is one of the 28 European Union Member States. However, the "acquis communautaire" has been suspended in the part of the country which is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the "CY" category and in the EU28 average. The interviews carried out in the part of the country that is not controlled by the government of the Republic of Cyprus are included in the "CY(tcc)" (tcc: *Turkish Cypriot Community*) category)

** Provisional abbreviation which in no way prejudges the definitive name of this country, which will be agreed once the current negotiations at the United Nations have been completed

* * * * *

We wish to thank all the people interviewed throughout Europe who took the time to participate in this survey.

Without their active participation, this survey would not have been possible.

[5] http://ec.europa.eu/public_opinion/index_en.htm

[6] The results tables are annexed. It should be noted that the total of the percentages indicated in the tables in this report may exceed 100% when the respondents were able to choose several answers to the same question.

I. LIFE IN THE EUROPEAN UNION

The Standard Eurobarometer of autumn 2013 (EB80) reveals a number of positive developments since the Standard Eurobarometer of spring 2013 (EB79). However, despite these real improvements, the results are still negative. We note that:

- Respondents are still very negative about economic issues and unemployment, both nationally and at EU level, but perceptions have improved significantly;
- Respondents are still slightly more likely to trust the EU than national political institutions, and trust in the EU has increased very slightly;
- Respondents are also slightly more likely to be optimistic about the outlook for the next twelve months, in particular as regards jobs and the economy. The feeling that “things are going in the right direction” has also gained ground.

From a personal point of view, Europeans do not expect any changes, in particular on the job front. The vast majority of them continue to be satisfied with the life they lead.

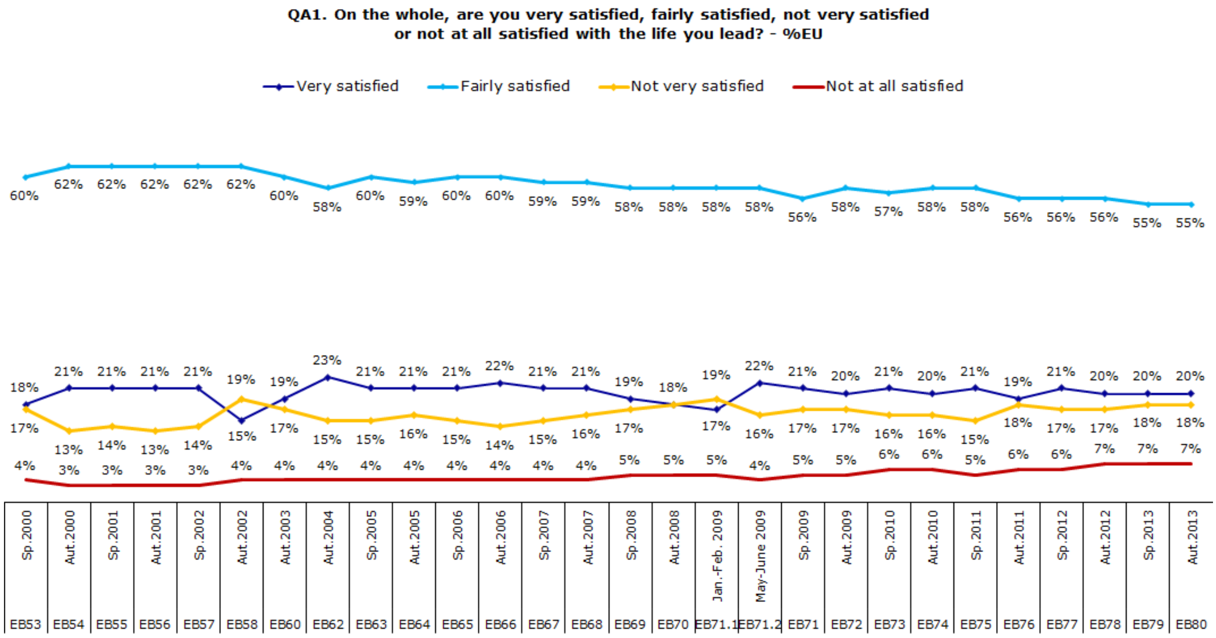
1. PERSONAL ASPECTS

1.1. The current personal situation of Europeans

- A very large majority of Europeans are satisfied with the life they lead -

Exactly 75% of Europeans continue to be satisfied with the life they lead at present, an identical percentage to that recorded in the Standard Eurobarometer survey of spring 2013 (EB79), including 20% who continue to be “very satisfied” (unchanged) and 55% who are ”fairly satisfied” (=). Similarly, 25% of Europeans are still dissatisfied, including, as in spring 2012, 18% who are “not very satisfied” and 7% who are “not at all satisfied”.

The results this time are therefore unchanged, and the situation has stabilised following the **slight deterioration noted during the previous two waves** (76% satisfied in autumn 2012 and 77% in spring 2012).



There is a significant gulf between the countries where respondents are the most satisfied (Denmark and Sweden, both 97%) and Bulgaria where only 35% of people are satisfied with their life, a difference of 62 percentage points.

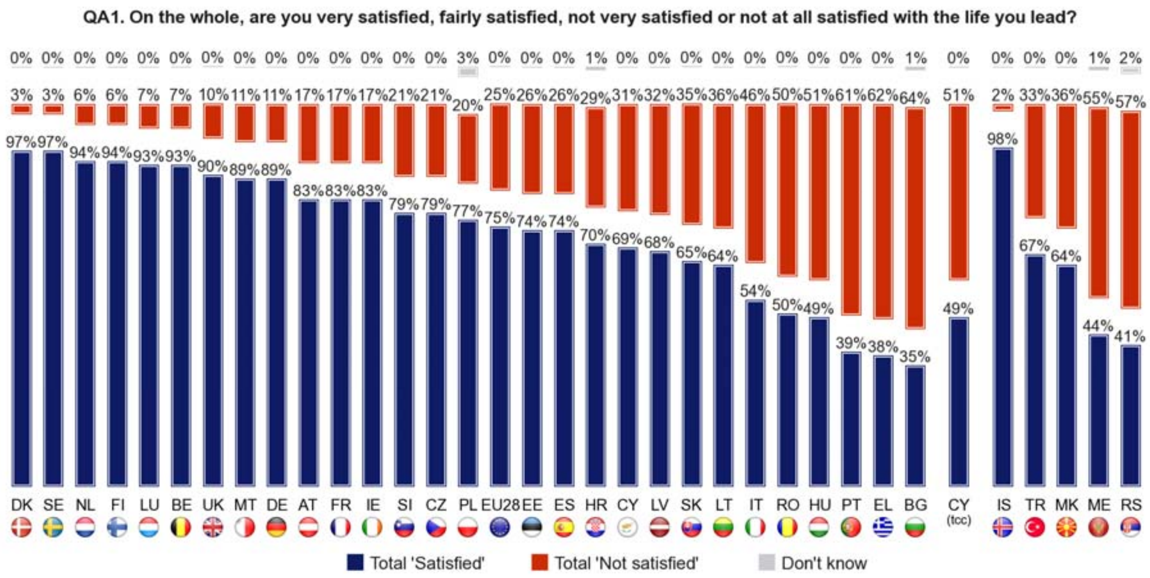
In 23 Member States, a majority of respondents are satisfied with their life in general, with the highest scores in Denmark (97%, +1 percentage point), Sweden (97%, +1), the Netherlands (94, -1), Finland (94%, unchanged), Luxembourg (93%, =), Belgium (93%, +1) and the United Kingdom (90%, =). In total, satisfaction has risen in 15 Member States (especially in Spain, 74%, +9, and Portugal, 39%, +6), is stable in five countries and has deteriorated in eight countries (most notably in Italy, 54%, -7, and Slovenia 79%, -6).

The four countries where only a minority of respondents are satisfied are Bulgaria (35% are satisfied, +1 percentage point, versus 64%, -1), Greece (38%, +2, versus 62%, -2), Portugal (39%, +6, versus 61%, -6) and Hungary (49%, +2, versus 51%, -2), although the proportion of satisfied respondents has increased in all four countries.

In Romania, opinions are evenly divided (50%, +4, versus 50%, -4).

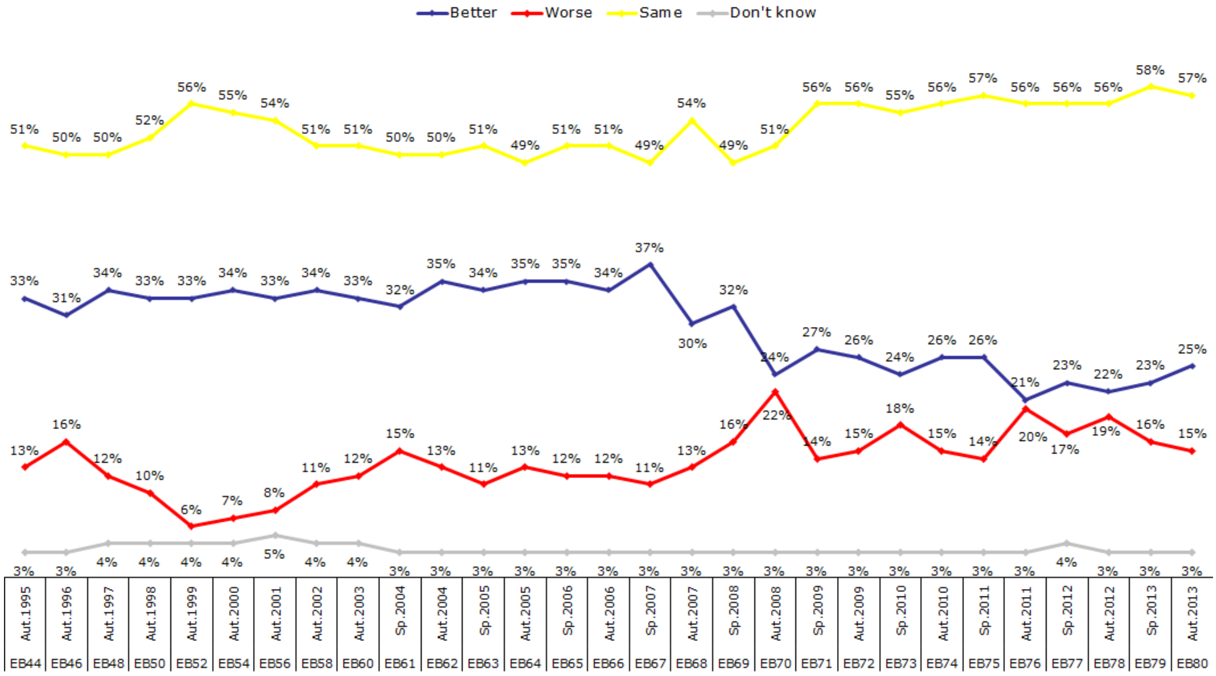
In the candidate countries:

- Iceland stands out by its high level of satisfaction of 98%, which is the highest score in any of the countries surveyed (unchanged since spring 2013);
- A majority of respondents in two other candidate countries are satisfied with life in general: Turkey (67%, -1 percentage point) and the Former Yugoslav Republic of Macedonia (64%, +2);
- Only a minority of respondents are satisfied in Serbia (41%, +6) and Montenegro (44%, -5).



Looking ahead over the **next twelve months**, Europeans in general are more optimistic than in the previous two surveys (spring 2013, EB79 and autumn 2012, EB78). A quarter of them believe that their life will be better (25%, +2 percentage points since spring 2013), while 57% expect it to stay the same (-1) and 15% think that it will be worse (-1).

QA3a.1. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...? - %EU
Your life in general

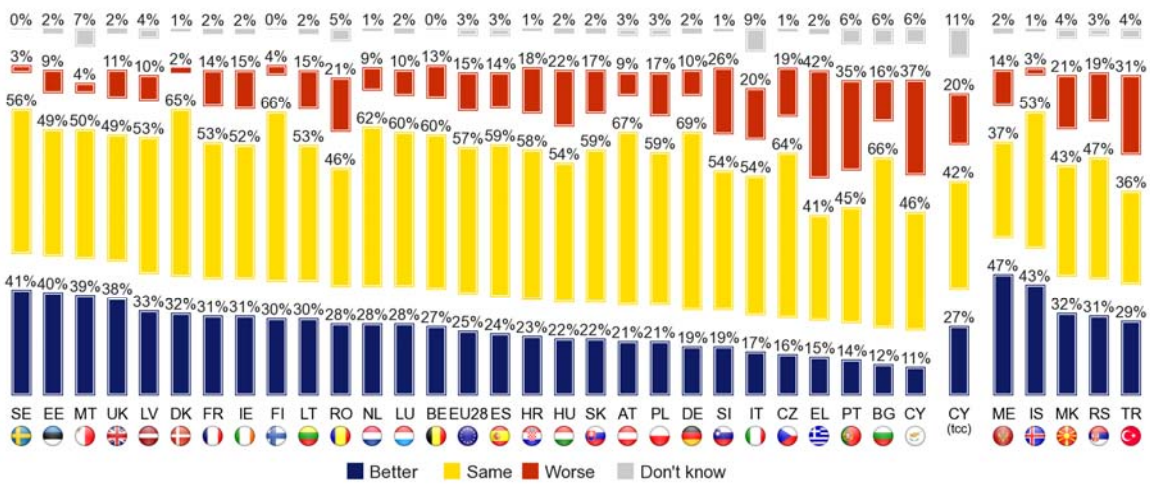


Respondents in Sweden (41% answered “better”), Estonia (40%), Malta (39%) and the United Kingdom (38%) are the most optimistic. In contrast, respondents in Cyprus (where only 11% think that life will get better), Bulgaria (12%), Portugal (14%) and Greece (15%) are the most pessimistic.

Among the candidate countries, respondents in Montenegro are the most optimistic of all the countries surveyed (47% expect things will be better) closely followed by Iceland (43%); the other countries are slightly above the European average (25% for “better”): 32% for the Former Yugoslav Republic of Macedonia, 31% for Serbia and 29% for Turkey.

QA3a.1. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

Your life in general



The optimism index for the next twelve months[7] stands at +10, an increase of three percentage points since spring 2013. The index has therefore gained seven percentage points since the autumn 2012 survey (EB78).

Twenty Member States have a positive index, the highest level being recorded in Sweden (+38), followed by Malta (+35), Estonia (+31) and Denmark (+30). Greece has the weakest optimism index (-27), just ahead of Cyprus (-26) and Portugal (-21).

The index has improved significantly in Ireland (+13) (the only increase above +10), but also in Hungary (+9), Malta (+8), Greece (+8), Estonia (+7), Belgium (+7) and Portugal (+7).

In contrast, the optimism index has deteriorated in eight countries, most notably in Latvia (-7), Luxembourg (-6) and Lithuania (-6). It is unchanged in Denmark and Slovakia.

The optimism index is positive in the candidate countries, except in Turkey: it is the highest in Iceland (+40) and Montenegro (+33). However, this index has improved only in Serbia, with an increase of six percentage points. On the other hand, it has deteriorated very sharply in Turkey (-22). As a result, the index is now negative in Turkey (-2), where a narrow majority of respondents are now pessimistic about the coming year.

[7] Difference between the percentages of “better” and “worse” answers

QA3a.1 What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?
Your life in general

	Better - Worse EB79 Sp. 2013	Better - Worse EB80 Aut. 2013	Diff. Aut. 2013 - Sp. 2013
EU28	+7	+10	**+3**
IE	+3	+16	**+13**
HU	-9	=	**+9**
EL	-35	-27	**+8**
MT	+27	+35	**+8**
BE	+7	+14	**+7**
EE	+24	+31	**+7**
PT	-28	-21	**+7**
NL	+13	+19	**+6**
CY	-31	-26	**+5**
ES	+5	+10	**+5**
PL	-1	+4	**+5**
UK	+23	+27	**+4**
AT	+9	+12	**+3**
CZ	-6	-3	**+3**
RO	+4	+7	**+3**
HR	+3	+5	**+2**
FR	+16	+17	**+1**
SI	-8	-7	**+1**
DK	+30	+30	=
SK	+5	+5	=
BG	-5	-4	**-1**
DE	+10	+9	**-1**
FI	+27	+26	**-1**
IT	=	-3	**-3**
SE	+41	+38	**-3**
LT	+21	+15	**-6**
LU	+24	+18	**-6**
LV	+30	+23	**-7**
CY (tcc)	-3	+7	**+10**
RS	+6	+12	**+6**
ME	+36	+33	**-3**
MK	+16	+11	**-5**
IS	+46	+40	**-6**
TR	+20	-2	**-22**

A socio-demographic analysis reveals a number of differences. Managers (92%), those who studied up to the age of 20 or beyond (85%) and students (91%) are the most satisfied with the life they lead.

However, not all these categories are the most optimistic about the future. The youngest respondents (44% of 15-24 year-olds) and students (41%) are the most likely to believe that the next twelve months will be “better” for their life in general. Unemployed people are also relatively more likely to be positive about the future (35%), ten percentage points above the European average.

	QA1. On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the life you lead?			QA3a.1. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...? Your life in general			
	Total 'Satisfied'	Total 'Not satisfied'	Don't know	Better	Worse	Same	Don't know
EU28	75%	25%	-	25%	15%	57%	3%
Gender							
Man	75%	25%	-	26%	15%	56%	3%
Woman	76%	24%	-	24%	15%	58%	3%
Age							
15-24	86%	14%	-	44%	7%	46%	3%
25-39	77%	23%	-	34%	13%	50%	3%
40-54	71%	29%	-	23%	16%	57%	4%
55 +	74%	26%	-	11%	19%	67%	3%
Education (End of)							
15-	65%	35%	-	14%	21%	61%	4%
16-19	72%	28%	-	24%	16%	57%	3%
20+	85%	15%	-	29%	12%	57%	2%
Still studying	91%	9%	-	41%	6%	51%	2%
Socio-professional category							
Self-employed	77%	23%	-	30%	15%	51%	4%
Managers	92%	8%	-	29%	10%	60%	1%
Other white collars	79%	21%	-	25%	12%	60%	3%
Manual workers	75%	25%	-	26%	15%	56%	3%
House persons	66%	34%	-	20%	17%	59%	4%
Unemployed	53%	47%	-	35%	21%	39%	5%
Retired	73%	26%	1%	10%	19%	68%	3%
Students	91%	9%	-	41%	6%	51%	2%
Difficulties paying bills							
Most of the time	42%	58%	-	24%	29%	42%	5%
From time to time	65%	35%	-	25%	19%	52%	4%
Almost never/ Never	89%	11%	-	24%	10%	64%	2%
Self-positioning on the social staircase							
Low (1-4)	54%	46%	-	21%	24%	51%	4%
Medium (5-6)	79%	21%	-	24%	14%	59%	3%
High (7-10)	88%	12%	-	29%	9%	60%	2%

1.2. Evaluations of job and financial situations

- The majority of Europeans are upbeat about their financial and job situations, in proportions which are stable overall -

The household financial situation

Perceptions of the **household financial situation** are the same as in the spring 2013 survey: 63% of Europeans consider that overall it is "good", while 35% think that it is "bad".

A majority of respondents in 20 European Union countries consider that the financial situation of their household is good (compared with 21 in spring 2013).

In nine Member States, at least three-quarters of respondents are **satisfied with the financial situation of their household:** Sweden (93%), Denmark (89%), Finland (88%), Luxembourg (86%), Belgium (82%), the Netherlands (81%), Germany (78%), the United Kingdom (78%) and Malta (75%).

However, a majority of respondents in seven Member States say that the financial situation of their household is **bad**: in Greece (71% answered "bad", versus 29% who answered "good"), Bulgaria (69/27), Portugal (68/30), Hungary (60/39), Cyprus (58/42), Romania (54/44) and Croatia (54/45).

Looking ahead over the next twelve months, 19% of Europeans expect the financial situation of their household to be "better" (+1 percentage point versus spring 2013). In contrast just under one in five respondents think that it will be "worse" (19%, unchanged), while the vast majority of 59% think that it will be the same (-1).

The optimism index is particularly high in Malta (+26), Estonia (+25), Sweden (+23) and Denmark (+20). In contrast, it is sharply negative in Cyprus (-46), Greece (-40) and Portugal (-30).

The optimism index in respect of the household financial situation has improved in 18 Member States, led by Malta (+11), Hungary (+11) and Ireland (+10). It has deteriorated in eight countries, in particular in Italy (-7) and Latvia (-5).

In almost all the candidate countries the optimism index for the household financial situation over the next twelve months is positive, most notably in Montenegro (with an optimism index of +27) and Iceland (+23), but also more moderately in Serbia (+7) and the Former Yugoslav Republic of Macedonia (+5). It is zero in Turkey, after a fall of five percentage points since spring 2013. However, it is in Iceland that the optimism index has fallen the most sharply (-8 since spring 2013).

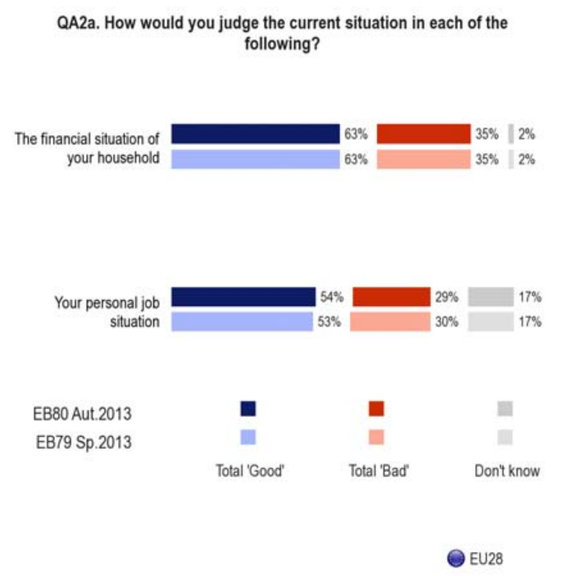
QA3a.3. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?
The financial situation of your household

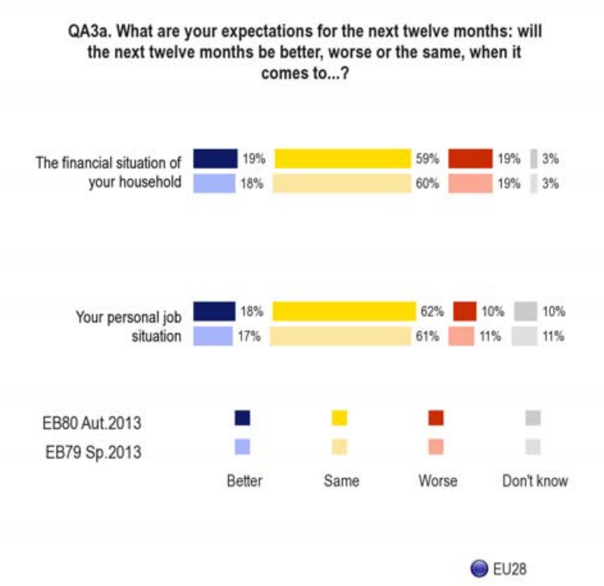
	Better - Worse EB79 Sp.2013	Better - Worse EB80 Aut.2013	Diff. Aut.2013-Sp.2013
EU28	-1	=	**+1**
HU	-14	-3	**+11**
MT	+15	+26	**+11**
IE	-10	=	**+10**
EL	-47	-40	**+7**
PL	-9	-2	**+7**
NL	-3	+3	**+6**
PT	-36	-30	**+6**
EE	+20	+25	**+5**
ES	-1	+3	**+4**
CZ	-16	-13	**+3**
HR	-4	-1	**+3**
RO	+1	+4	**+3**
UK	+11	+14	**+3**
BE	+3	+5	**+2**
FR	+2	+4	**+2**
SE	+21	+23	**+2**
SK	-4	-2	**+2**
FI	+16	+17	**+1**
AT	+8	+8	**=**
DK	+20	+20	**=**
DE	+2	+1	**-1**
LT	+13	+12	**-1**
LU	+11	+10	**-1**
SI	-20	-21	**-1**
BG	-11	-9	**-2**
CY	-43	-46	**-3**
LV	+22	+17	**-5**
IT	-9	-16	**-7**
CY (tcc)	-14	-2	**+12**
RS	+5	+7	**+2**
MK	+6	+5	**-2**
ME	+31	+27	**-4**
TR	+5	=	**-5**
IS	+31	+23	**-8**

The personal job situation

Europeans are slightly less positive about their personal job situation than about their financial situation. However, an absolute majority of them think that their situation is good (54%, +1 percentage point since spring 2013). Slightly fewer now think that their personal job situation is bad (29%, -1).

Future projections are stable: 62% of Europeans expect their personal job situation to remain the same over the next twelve months (+1 percentage point), while 18% think that it will improve (+1) and one in ten said that it would be worse (10%, -1).





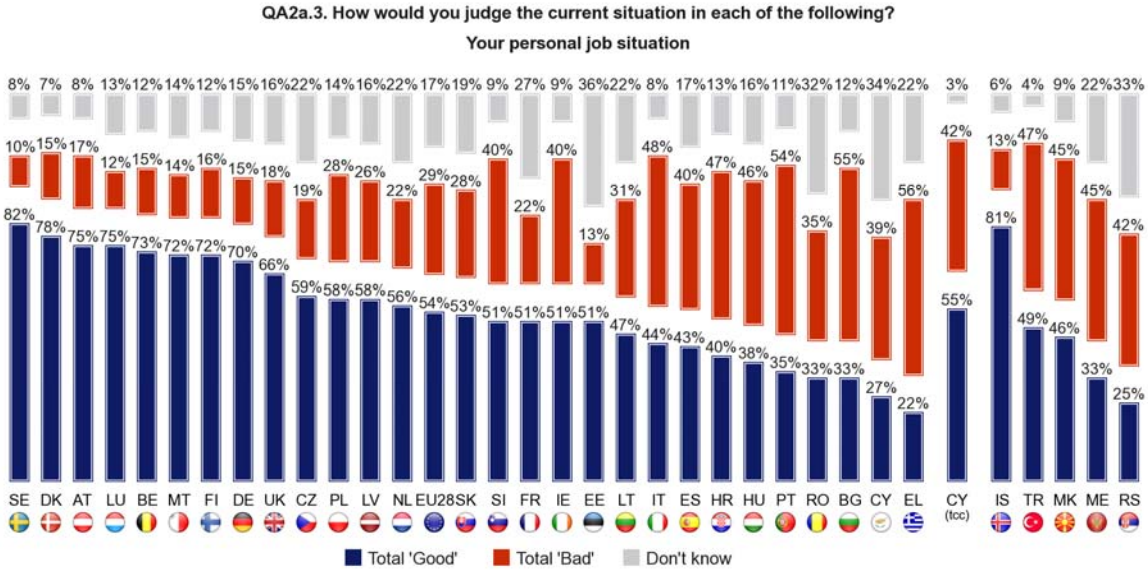
In most of the countries (20), the majority of respondents are satisfied with their personal situation, as was also the case in the spring 2013 survey. Satisfaction is most widespread in Sweden (82%), Denmark (78%), and Austria and Luxembourg (both 75%).

Perceptions of the personal job situation are the most negative in Greece (only 22% are "satisfied") and Cyprus (27%).

In terms of changes, personal job perceptions have improved in 18 Member States, most notably in Hungary (38%, +9 percentage points) and Poland (58%, +7). In contrast, they have deteriorated the most in Slovenia (51, -5), Bulgaria (33%, -4) and the Netherlands (56%, -4).

In the candidate countries, the scores are extremely positive in Iceland, where 81% of respondents consider that their personal job situation is "good".

In Turkey (49%, versus 47% “dissatisfied”) and the Former Yugoslav Republic of Macedonia (46% versus 45%), a narrow majority of respondents are satisfied with their personal job situation. In the other candidate countries, only a minority of respondents are satisfied, the lowest level of satisfaction being recorded in Serbia (25%).



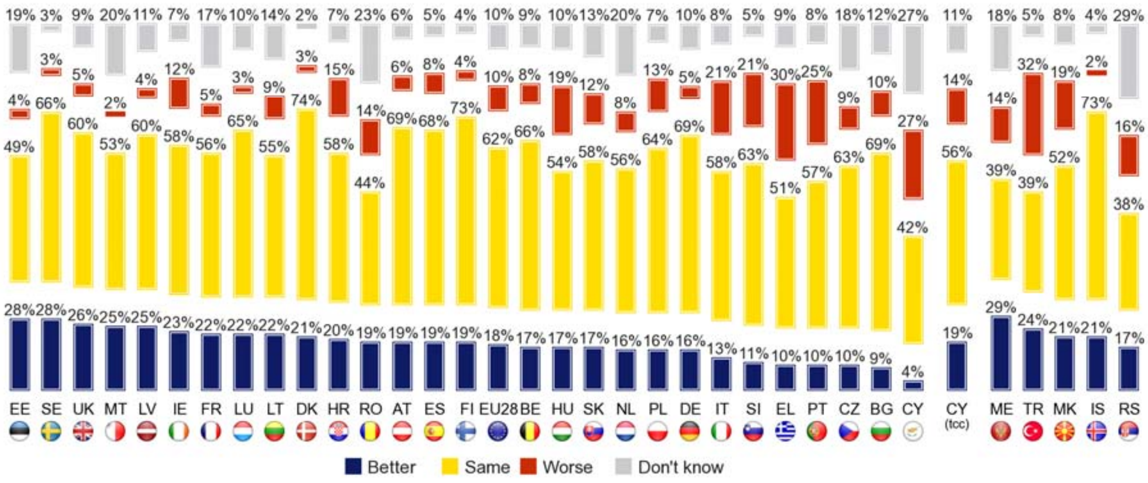
The optimism index for the personal job situation for the next twelve months is positive in 21 Member States and has risen in a large majority of countries, most notably in Ireland (+9) and Hungary (+8). It has deteriorated the most markedly in Slovenia (-6).

The optimism indices are negative in seven Member States: Cyprus (-23), Greece (-20), Portugal (-15), Slovenia (-10), Italy (-8), Hungary (-2) and Bulgaria (-1).

In the candidate countries, the optimism index is narrowly positive in Serbia (+1) and the Former Yugoslav Republic of Macedonia (+2). It is the highest in Iceland (+19) and Montenegro (+15). However, after a fall of 12 percentage points since spring 2013, this index is now negative in Turkey (-8).

QA3a.5. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

Your personal job situation



These results are influenced by a number of socio-demographic factors. The respondents who studied the longest, managers and those who do not struggle to pay their bills are the most likely to be satisfied with both the financial situation of their household and their personal job situation.

The youngest respondents, students and unemployed people are again the most likely to expect the situation to improve over the next twelve months.

	QA2a. How would you judge the current situation in each of the following?						QA3a. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?							
	Your personal job situation			The financial situation of your household			Your personal job situation				The financial situation of your household			
	Total 'Good'	Total 'Bad'	Don't know	Total 'Good'	Total 'Bad'	Don't know	Better	Worse	Same	Don't know	Better	Worse	Same	Don't know
EU28	54%	29%	17%	63%	35%	2%	18%	10%	62%	10%	19%	19%	59%	3%
Gender														
Man	57%	29%	14%	64%	34%	2%	19%	11%	61%	9%	20%	18%	59%	3%
Woman	52%	29%	19%	62%	36%	2%	17%	10%	61%	12%	18%	20%	59%	3%
Age														
15-24	51%	27%	22%	66%	29%	5%	36%	6%	47%	11%	30%	10%	55%	5%
25-39	64%	33%	3%	64%	35%	1%	27%	11%	57%	5%	29%	17%	52%	2%
40-54	60%	35%	5%	58%	40%	2%	17%	14%	63%	6%	19%	20%	58%	3%
55 +	46%	22%	32%	64%	34%	2%	4%	10%	69%	17%	8%	22%	68%	2%
Education (End of)														
15-	39%	34%	27%	51%	47%	2%	7%	13%	65%	15%	11%	24%	62%	3%
16-19	55%	32%	13%	59%	39%	2%	17%	11%	62%	10%	19%	20%	58%	3%
20+	68%	23%	9%	75%	24%	1%	23%	8%	63%	6%	23%	15%	60%	2%
Still studying	51%	17%	32%	70%	24%	6%	30%	5%	50%	15%	25%	9%	61%	5%
Socio-professional category														
Self-employed	67%	30%	3%	67%	31%	2%	23%	14%	59%	4%	25%	17%	53%	5%
Managers	89%	10%	1%	86%	13%	1%	20%	7%	72%	1%	21%	14%	64%	1%
Other white collars	78%	21%	1%	72%	26%	2%	19%	13%	65%	3%	20%	18%	60%	2%
Manual workers	71%	27%	2%	62%	36%	2%	20%	12%	63%	5%	22%	18%	56%	4%
House persons	31%	40%	29%	51%	47%	2%	12%	14%	60%	14%	18%	24%	55%	3%
Unemployed	11%	84%	5%	29%	69%	2%	35%	18%	39%	8%	30%	25%	42%	3%
Retired	41%	18%	41%	64%	34%	2%	3%	7%	69%	21%	7%	21%	70%	2%
Students	51%	17%	32%	70%	24%	6%	30%	5%	50%	15%	25%	9%	61%	5%
Difficulties paying bills														
Most of the time	25%	64%	11%	17%	82%	1%	19%	22%	49%	10%	20%	38%	38%	4%
From time to time	45%	41%	14%	45%	53%	2%	19%	14%	58%	9%	20%	23%	53%	4%
Almost never/ Never	67%	15%	18%	83%	15%	2%	17%	6%	67%	10%	18%	12%	68%	2%
Self-positioning on the social staircase														
Low (1-4)	33%	48%	19%	33%	65%	2%	16%	17%	55%	12%	17%	31%	48%	4%
Medium (5-6)	57%	26%	17%	66%	32%	2%	18%	9%	63%	10%	19%	16%	62%	3%
High (7-10)	70%	16%	14%	84%	15%	1%	19%	7%	65%	9%	21%	13%	64%	2%

1.3. The concerns of Europeans

- The personal concerns of Europeans are relatively unchanged and continue to be dominated by rising prices -

When asked to identify the most important issues facing them personally, the answers of Europeans are fairly similar to those recorded in the Standard Eurobarometer survey of spring 2013 (EB79).

Rising prices are the main issue facing Europeans today, far ahead of the other items (40%, -1 percentage point).

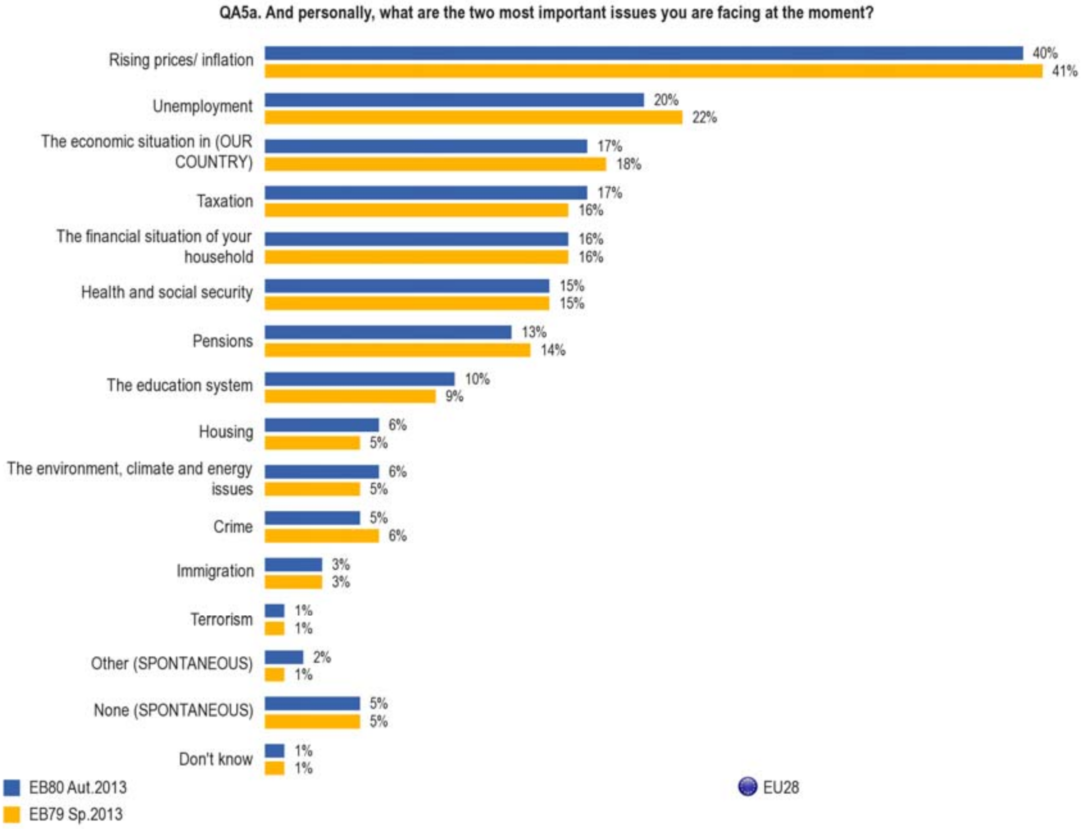
In second place, **unemployment** is a concern for 20% of Europeans, but the proportion of respondents mentioning this item has decreased by two percentage points since the last survey.

Next, Europeans mentioned, in identical proportions, **the national economic situation** (17%, -1 percentage point) and **taxation**, with a slight increase on spring 2013 (17%, +1).

With results unchanged since spring, **the household financial situation** gives concern to 16% of respondents, while 15% mentioned **health and social security**.

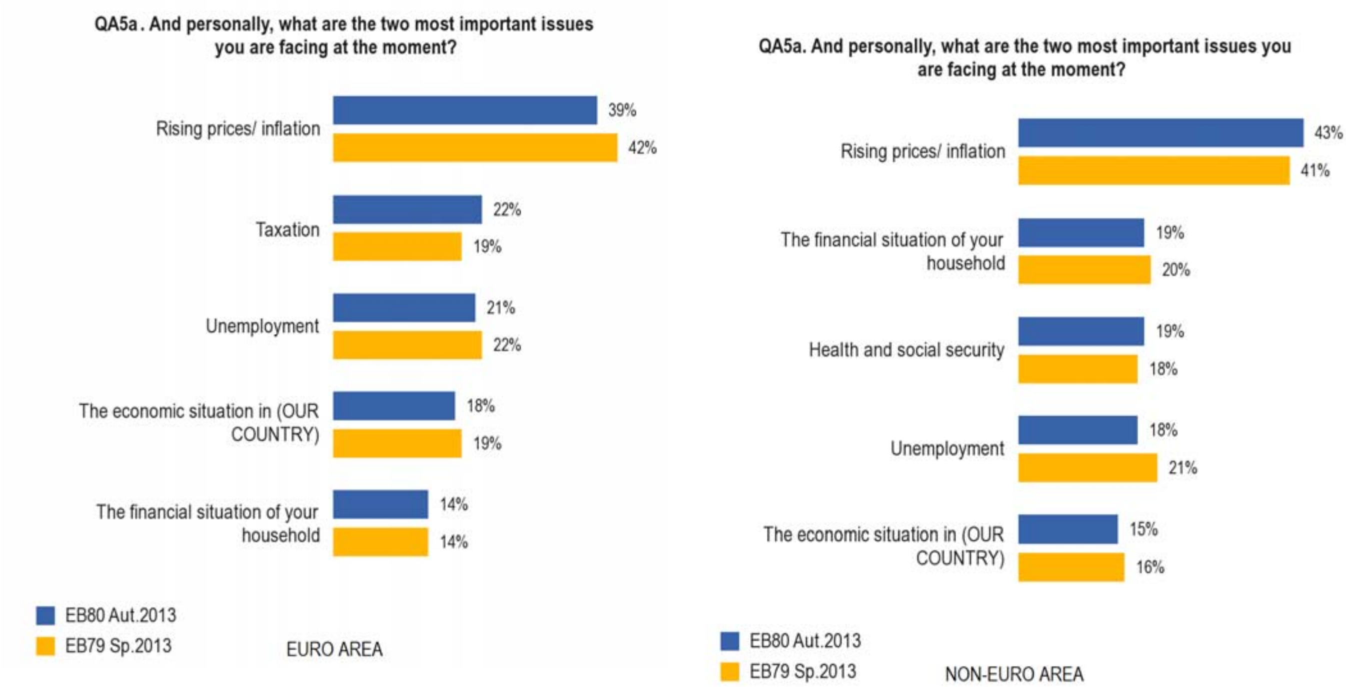
Pensions (13%, -1) and **the education system** (10%, +1) seem to be seen as relatively minor concerns.

Lastly, respondents mentioned **housing** (6%, +1), **the environment** (6%, +1), **crime** (5%, -1), **immigration** (3%, unchanged) and **terrorism** (1%, =).



Maximum two answers

The order in which respondents rank their personal concerns varies significantly between euro area and non-euro area countries. For example, while taxation is the second most important concern in the euro area (22%), non-euro area respondents rank this issue in seventh place (10%). However, non-euro area respondents are more likely to be concerned about health and social security (19%, in joint second place with the household financial situation) than those in the euro area (12%, in seventh place).



Five most frequently mentioned items in the euro area and outside the euro area

Rising prices are the main concern in 20 European Union countries, most notably in Lithuania (60%), Slovakia (60%), the Czech Republic (57%), Estonia (57%), Austria (54%), Poland (51%), and Hungary and Romania (50% in both countries). In sharp contrast, only 3% of respondents in Sweden mentioned this item.

Concerns about rising prices continue to fall very sharply in Bulgaria (35%, -9 percentage points since spring 2013 and -21 since autumn 2012). Worries on this subject have also eased very significantly in Luxembourg (28%, -12) and Finland (27%, -9), but have increased since spring 2013 in Latvia (43%, +10) and the United Kingdom (40%, +6).

Unemployment is the main concern in Spain (39%), Ireland (33%) and Denmark (19%). Although not the main concern, this item was mentioned by a quarter or more of respondents in Cyprus (38%), Greece (30%), Croatia (30%), Portugal (29%), Bulgaria (26%) and Italy (25%). The lowest score was recorded in Malta (10%).

In comparison with spring 2013, concerns about unemployment have eased in 15 Member States, but only to a moderate degree. The most significant declines were recorded in Poland (22%, -5 percentage points) and Latvia (18%, -5). In contrast, concerns about this issue have increased in Luxembourg (17%, +5), and to lesser extent in the Netherlands (19%, +3), Slovenia (23%, +3) and Greece (30, +3).

Although not the main personal concern, **the national economic situation** was frequently mentioned in Spain (32%, +1 percentage point), Cyprus (31%, -3), Greece (29%, -2), Bulgaria (28%, +3) and Ireland (28%, unchanged). The lowest score was recorded in Germany (7%, -1). There have been few changes on this item, except in Malta (10%, -8), Belgium (12%, -5) and Croatia (23%, -4) where the number of respondents mentioning this item has decreased since spring 2013.

Taxation is seen as the most pressing concern in Greece (36%, +6 percentage points). It also figures prominently in Italy (38%, +1) and Lithuania (37%, +1). Concerns about taxation have increased very sharply in France (30%, +17) and, to a lesser extent, in Cyprus (12%, +9) and Slovenia (24%, +9).

The household financial situation was mentioned by far the most frequently in Cyprus (43%, unchanged), ahead of Bulgaria, where concerns on this issue have increased significantly, so much so that it is now ranked in joint first place with rising prices (35%, +8 percentage points). Hungary stands out in that concerns on this issue have decreased (24%, -8), as they also have in Slovenia (15%, -6) and Malta (9%, -6).

Health and social security is a key issue in some Member States, but is a more secondary matter in others: it is the main concern in Sweden (43%, +2 percentage points), Finland (39%, +7) and the Netherlands (30%, +2), but was mentioned by only 5% of respondents in Italy (-1), 6% in Luxembourg (-1), 6% in Cyprus (–3) and 7% in Belgium (-4).

Sweden stands out by the greater emphasis placed by respondents on the **education system** (35%, +4 percentage points) and environmental issues (24%, unchanged) compared with the other countries.

Denmark is the only country in which none of these subjects achieved a score of 20%: **unemployment** tops the list with 19%, in dramatic contrast with the result recorded in Spain (39%). What is more, 19% of respondents in Denmark replied *spontaneously* “none”.

In the candidate countries, **rising prices** are the main concern in Serbia (42%, +1 percentage point), Montenegro (41%, -8) and Iceland (38%, unchanged); unemployment is the most mentioned item in the Former Yugoslav Republic of Macedonia (46%, +4) and Turkey (37%, +1).

Iceland stands out with the lowest score for **unemployment** (7%, -2 percentage points), though a relatively large proportion of respondents mentioned the **healthcare system** (28%, +4).

Turkey has the highest scores of any the countries surveyed – despite a decrease – for the **national economic situation** (35%, -5 percentage points) and **terrorism** (18%, -6).

QA5a. And personally, what are the two most important issues you are facing at the moment?

	Rising prices/ inflation	Unemployment	The economic situation in (OUR COUNTRY)	Taxation	The financial situation of your household	Health and social security	Pensions	The education system	The environment, climate and energy issues	Housing	Crime	Immigration	Terrorism
EU28	40%	20%	17%	17%	16%	15%	13%	10%	6%	6%	5%	3%	1%
BE	42%	16%	12%	22%	13%	7%	13%	8%	12%	7%	12%	5%	1%
BG	35%	26%	28%	5%	35%	22%	15%	6%	2%	1%	7%	2%	1%
CZ	57%	11%	11%	9%	18%	19%	15%	7%	5%	9%	4%	2%	0%
DK	18%	19%	15%	6%	15%	17%	13%	13%	11%	5%	9%	4%	1%
DE	43%	11%	7%	11%	11%	14%	16%	15%	11%	5%	4%	3%	0%
EE	57%	12%	14%	16%	17%	21%	18%	14%	2%	4%	2%	1%	0%
IE	32%	33%	28%	21%	20%	15%	8%	10%	2%	6%	6%	4%	1%
EL	28%	30%	29%	36%	25%	11%	13%	8%	1%	0%	6%	3%	2%
ES	26%	39%	32%	12%	11%	15%	13%	13%	1%	7%	3%	1%	1%
FR	45%	17%	13%	30%	18%	8%	14%	9%	6%	6%	9%	4%	0%
HR	45%	30%	23%	7%	26%	11%	15%	5%	2%	5%	3%	0%	0%
IT	41%	25%	23%	38%	12%	5%	6%	4%	4%	2%	5%	4%	3%
CY	25%	38%	31%	12%	43%	6%	5%	6%	2%	4%	5%	2%	0%
LV	43%	18%	21%	17%	19%	24%	10%	8%	1%	8%	2%	2%	0%
LT	60%	18%	13%	37%	8%	13%	10%	5%	2%	6%	4%	2%	0%
LU	28%	17%	13%	17%	10%	6%	11%	16%	9%	18%	8%	4%	2%
HU	50%	24%	23%	8%	24%	14%	13%	7%	3%	7%	6%	0%	1%
MT	41%	10%	10%	8%	9%	12%	14%	11%	16%	4%	4%	14%	1%
AT	54%	12%	11%	11%	19%	17%	14%	9%	6%	8%	6%	4%	1%
NL	22%	19%	22%	10%	21%	30%	16%	17%	10%	6%	5%	1%	1%
PL	51%	22%	11%	8%	14%	16%	12%	7%	2%	4%	2%	2%	1%
PT	47%	29%	22%	23%	19%	10%	14%	3%	0%	1%	1%	1%	1%
RO	50%	20%	23%	17%	20%	19%	14%	9%	3%	4%	5%	2%	1%
SI	29%	23%	21%	24%	15%	10%	17%	9%	3%	6%	2%	0%	0%
SK	60%	16%	17%	7%	22%	18%	13%	8%	4%	7%	2%	0%	0%
FI	27%	16%	20%	10%	19%	39%	14%	11%	13%	13%	3%	2%	0%
SE	3%	16%	13%	6%	18%	43%	17%	35%	24%	10%	6%	5%	0%
UK	40%	15%	13%	8%	21%	18%	16%	10%	9%	9%	4%	6%	2%
CY (tcc)	57%	31%	36%	12%	10%	12%	3%	7%	5%	5%	6%	3%	2%
MK	33%	46%	29%	5%	17%	8%	6%	5%	3%	3%	8%	4%	1%
IS	38%	7%	22%	14%	23%	28%	12%	17%	7%	15%	1%	1%	0%
ME	41%	29%	26%	8%	25%	8%	2%	9%	8%	8%	7%	0%	1%
RS	42%	32%	28%	5%	30%	11%	1%	7%	7%	6%	7%	0%	0%
TR	20%	37%	35%	11%	5%	6%	1%	11%	11%	5%	13%	6%	18%

Highest percentage per country *Lowest percentage per country*
Highest percentage per item Lowest percentage per item

Maximum two answers

QA5a. And personally, what are the two most important issues you are facing at the moment?

	Rising prices/ inflation	Unemploy-ment	The economic situation in (OUR COUNTRY)	Taxation	The financial situation of your household	Health and social security	Pensions	The education system	Housing	The environ-ment, climate and energy issues	Crime	Immi-gration	Terrorism
EU28	40%	20%	17%	17%	16%	15%	13%	10%	6%	6%	5%	3%	1%
BE	42%	16%	12%	22%	13%	7%	13%	8%	7%	12%	12%	5%	1%
BG	35%	26%	28%	5%	35%	22%	15%	6%	1%	2%	7%	2%	1%
CZ	57%	11%	11%	9%	18%	19%	15%	7%	9%	5%	4%	2%	0%
DK	18%	19%	15%	6%	15%	17%	13%	13%	5%	11%	9%	4%	1%
DE	43%	11%	7%	11%	11%	14%	16%	15%	5%	11%	4%	3%	0%
EE	57%	12%	14%	16%	17%	21%	18%	14%	4%	2%	2%	1%	0%
IE	32%	33%	28%	21%	20%	15%	8%	10%	6%	2%	6%	4%	1%
EL	28%	30%	29%	36%	25%	11%	13%	8%	0%	1%	6%	3%	2%
ES	26%	39%	32%	12%	11%	15%	13%	13%	7%	1%	3%	1%	1%
FR	45%	17%	13%	30%	18%	8%	14%	9%	6%	6%	9%	4%	0%
HR	45%	30%	23%	7%	26%	11%	15%	5%	5%	2%	3%	0%	0%
IT	41%	25%	23%	38%	12%	5%	6%	4%	2%	4%	5%	4%	3%
CY	25%	38%	31%	12%	43%	6%	5%	6%	4%	2%	5%	2%	0%
LV	43%	18%	21%	17%	19%	24%	10%	8%	8%	1%	2%	2%	0%
LT	60%	18%	13%	37%	8%	13%	10%	5%	6%	2%	4%	2%	0%
LU	28%	17%	13%	17%	10%	6%	11%	16%	18%	9%	8%	4%	2%
HU	50%	24%	23%	8%	24%	14%	13%	7%	7%	3%	6%	0%	1%
MT	41%	10%	10%	8%	9%	12%	14%	11%	4%	16%	4%	14%	1%
AT	54%	12%	11%	11%	19%	17%	14%	9%	8%	6%	6%	4%	1%
NL	22%	19%	22%	10%	21%	30%	16%	17%	6%	10%	5%	1%	1%
PL	51%	22%	11%	8%	14%	16%	12%	7%	4%	2%	2%	2%	1%
PT	47%	29%	22%	23%	19%	10%	14%	3%	1%	0%	1%	1%	1%
RO	50%	20%	23%	17%	20%	19%	14%	9%	4%	3%	5%	2%	1%
SI	29%	23%	21%	24%	15%	10%	17%	9%	6%	3%	2%	0%	0%
SK	60%	16%	17%	7%	22%	18%	13%	8%	7%	4%	2%	0%	0%
FI	27%	16%	20%	10%	19%	39%	14%	11%	13%	13%	3%	2%	0%
SE	3%	16%	13%	6%	18%	43%	17%	35%	10%	24%	6%	5%	0%
UK	40%	15%	13%	8%	21%	18%	16%	10%	9%	9%	4%	6%	2%

1st MOST FREQUENTLY MENTIONED ITEM
2nd MOST FREQUENTLY MENTIONED ITEM
3rd MOST FREQUENTLY MENTIONED ITEM

Maximum two answers

A socio-demographic analysis reveals that **rising prices** top the list of concerns in all socio-professional categories, except among unemployed people, for whom **unemployment** is by far the main problem (73%). The respondents who studied the least (43% of those who left school at age 15 or earlier, 44% of those who ended their studies between the ages of 16 and 19), manual workers (48%), white collar workers (45%) and the retired (42%) are more likely to be concerned about rising prices.

Taxation is the second most important concern of self-employed people (33%).

The **healthcare system** is most likely to be mentioned the oldest respondents (22%) and retired people (24%).

People who regularly struggle to pay their bills are primarily concerned about **unemployment** (39%), just ahead of **rising prices** (38%). They are also more likely to mention **the financial situation of their household** than Europeans on average (33%, in third place).

QA5a. And personally, what are the two most important issues you are facing at the moment?

	Rising prices/ inflation	Unemployment	The economic situation in (OUR COUNTRY)	Taxation	The financial situation of your household	Health and social security
EU28	40%	20%	17%	17%	16%	15%
Gender						
Man	39%	20%	19%	19%	16%	14%
Woman	41%	21%	15%	16%	17%	15%
Age						
15-24	33%	28%	15%	11%	15%	7%
25-39	41%	25%	20%	21%	20%	10%
40-54	43%	23%	20%	19%	20%	13%
55 +	40%	12%	14%	16%	11%	22%
Education (End of)						
15-	43%	21%	16%	16%	15%	17%
16-19	44%	22%	17%	17%	19%	14%
20+	36%	17%	18%	21%	14%	17%
Still studying	30%	19%	14%	10%	12%	7%
Socio-professional category						
Self-employed	37%	11%	25%	33%	17%	12%
Managers	37%	7%	17%	22%	12%	14%
Other white collars	45%	15%	20%	22%	17%	12%
Manual workers	48%	17%	19%	20%	20%	13%
House persons	40%	27%	20%	18%	20%	13%
Unemployed	30%	73%	19%	9%	24%	7%
Retired	42%	9%	12%	13%	11%	24%
Students	30%	19%	14%	10%	12%	7%
Difficulties paying bills						
Most of the time	38%	39%	19%	16%	33%	10%
From time to time	45%	25%	20%	21%	22%	12%
Almost never/ Never	38%	14%	15%	16%	9%	18%

Maximum two answers – Six most frequently mentioned items

The following tables show the results by socio-demographic criteria in the whole of the European Union (EU28) on average, in the six largest EU countries and in four countries which have been particularly badly affected by the economic crisis.

QA5a. And personally, what are the two most important issues you are facing at the moment?

Rising prices/ inflation

	EU28	DE	ES	FR	IT	PL	UK	EL	PT	IE	CY
	40%	43%	26%	45%	41%	51%	40%	28%	47%	32%	25%
Gender											
Men	39%	40%	23%	43%	42%	47%	41%	28%	28%	47%	24%
Women	41%	45%	28%	46%	39%	54%	38%	28%	36%	47%	26%
Age											
15-24	33%	32%	16%	41%	26%	41%	34%	30%	18%	43%	13%
25-39	41%	41%	22%	51%	37%	52%	43%	29%	35%	48%	24%
40-54	43%	47%	30%	50%	40%	57%	44%	28%	37%	49%	28%
55 +	40%	44%	29%	38%	47%	49%	36%	27%	32%	47%	31%
Education (End of)											
15-	43%	51%	27%	45%	46%	55%	40%	36%	35%	50%	31%
16-19	44%	47%	29%	47%	41%	52%	40%	26%	33%	49%	27%
20+	36%	37%	25%	41%	39%	52%	42%	22%	33%	42%	26%
Still studying	30%	25%	11%	48%	28%	48%	26%	33%	20%	35%	10%
Socio-professional category											
Self-employed	37%	33%	32%	33%	40%	50%	41%	30%	36%	41%	21%
Managers	37%	34%	26%	41%	45%	44%	44%	24%	39%	43%	32%
Other white collars	45%	39%	25%	67%	45%	60%	43%	28%	37%	44%	27%
Manual workers	48%	57%	37%	53%	37%	52%	46%	30%	35%	62%	38%
House persons	40%	43%	29%	49%	38%	46%	39%	38%	43%	43%	42%
Unemployed	30%	43%	16%	30%	29%	47%	33%	17%	15%	41%	14%
Retired	42%	47%	29%	39%	51%	51%	37%	27%	29%	47%	28%
Students	30%	25%	11%	48%	28%	48%	26%	33%	20%	35%	10%

QA5a. And personally, what are the two most important issues you are facing at the moment?

Unemployment

	EU28	DE	ES	FR	IT	PL	UK	EL	PT	IE	CY
	20%	11%	39%	17%	25%	22%	15%	30%	29%	33%	38%
Gender											
Men	20%	10%	37%	17%	25%	21%	15%	27%	28%	35%	35%
Women	21%	11%	40%	17%	26%	23%	15%	32%	30%	31%	41%
Age											
15-24	28%	20%	43%	21%	37%	28%	29%	38%	33%	47%	49%
25-39	25%	14%	44%	25%	26%	24%	18%	39%	34%	33%	43%
40-54	23%	13%	43%	21%	28%	26%	14%	35%	40%	32%	36%
55 +	12%	5%	29%	7%	19%	14%	6%	14%	18%	26%	29%
Education (End of)											
15-	21%	9%	40%	12%	25%	12%	11%	24%	29%	31%	33%
16-19	22%	14%	41%	21%	25%	29%	17%	32%	38%	37%	41%
20+	17%	6%	38%	16%	27%	17%	10%	35%	26%	27%	36%
Still studying	19%	13%	30%	7%	24%	20%	24%	21%	20%	40%	43%
Socio-professional category											
Self-employed	11%	4%	12%	6%	12%	17%	4%	22%	15%	19%	30%
Managers	7%	1%	12%	5%	18%	11%	4%	0%	13%	14%	7%
Other white collars	15%	14%	31%	8%	16%	15%	12%	23%	19%	21%	20%
Manual workers	17%	9%	24%	17%	27%	16%	13%	31%	21%	33%	25%
House persons	27%	16%	33%	22%	26%	25%	25%	22%	25%	29%	31%
Unemployed	73%	77%	87%	73%	74%	82%	51%	82%	80%	77%	87%
Retired	9%	2%	18%	6%	18%	13%	6%	10%	15%	18%	19%
Students	19%	13%	30%	7%	24%	20%	24%	21%	20%	40%	43%

2. ECONOMIC ASPECTS

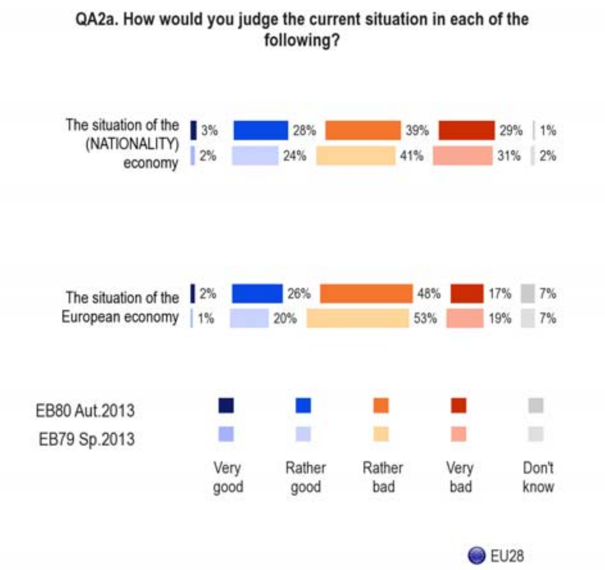
2.1. Evaluations of the current economic situation

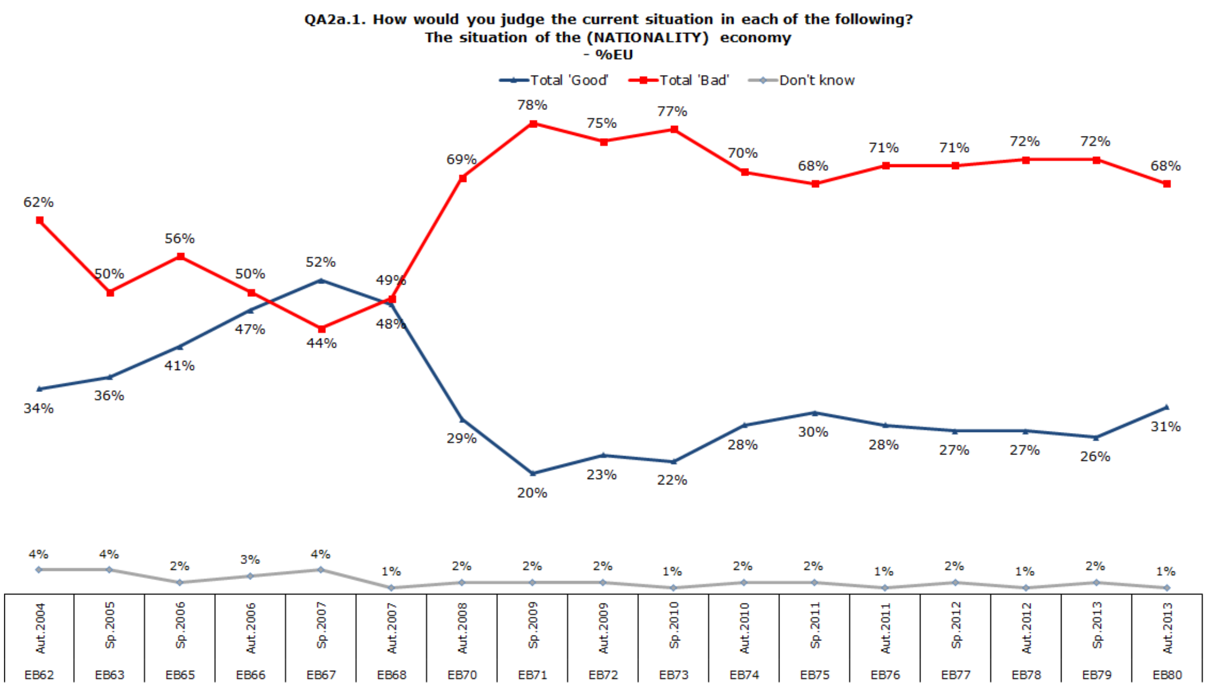
- Results are still negative, but perceptions of the economic and employment situations have improved –

2.1.1. The national and European situations

Europeans are still fairly negative about both the national and European economic situations. However, perceptions have improved since spring 2013.

Almost a third of respondents (31%, +5 percentage points) think that overall their **country's economy** is in "good" shape; at the same time the proportion of Europeans who think that the situation is "bad" has fallen (68%, -4).





Although Europeans continue to be more upbeat about the national economy than about the European economic situation, perceptions of the latter have nevertheless improved significantly: 28% of Europeans say that it is “good” (+7 percentage points) versus 65% who think that it is “bad” (-7).

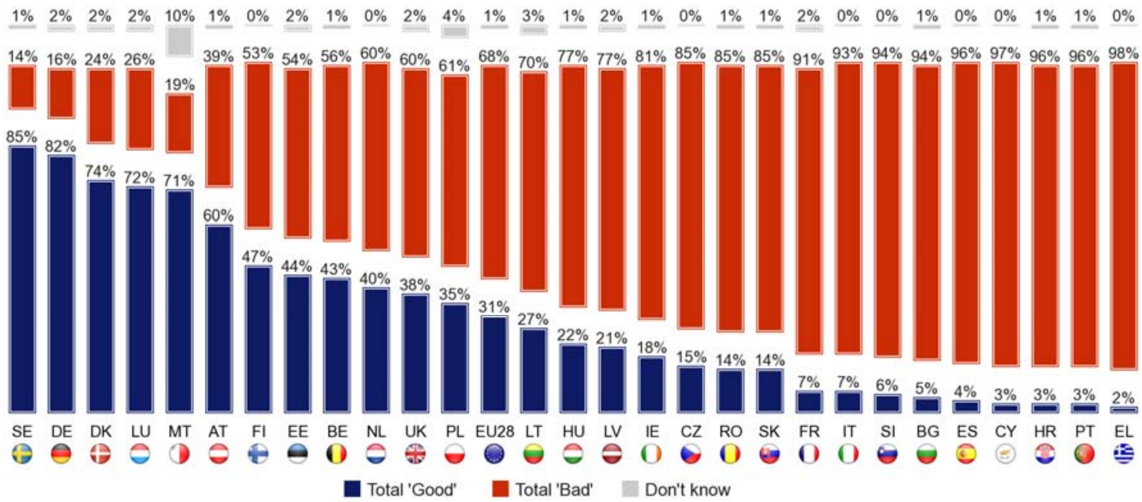
There are a number of differences between euro area and non-euro area countries. **In contrast to the results of the previous surveys, non-euro area respondents are now slightly more positive than euro area respondents** about the national economic situation: a third of them consider that the situation in their country is good (33%, +10 percentage points), versus 30% of euro area respondents (+2).

The differences are more striking with regard to the European economic situation: just over a third of non-euro area respondents consider that it is “good” (36%, +8 percentage points), compared with just under a quarter of euro area respondents (23%, +6).

QA2a. How would you judge the current situation in each of the following?

	The situation of the (NATIONALITY) economy		The situation of the European economy	
	Total 'Good'	Total 'Bad'	Total 'Good'	Total 'Bad'
EU28	31%	68%	28%	65%
EURO AREA	30%	69%	23%	72%
NON-EURO AREA	33%	65%	36%	53%

QA2a.1. How would you judge the current situation in each of the following?
The situation of the (NATIONALITY) economy

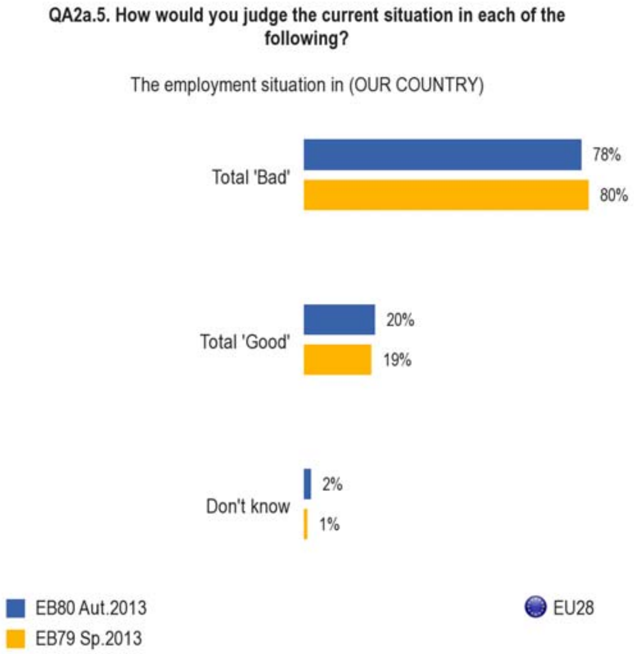


QA2a.1. How would you judge the current situation in each of the following?
The situation of the (NATIONALITY) economy

	Total 'Good'	Diff. Aut.2013-Sp.2013	Total 'Bad'	Diff. Aut.2013-Sp.2013	Don't know	Diff. Aut.2013-Sp.2013
EU28	31%	+5	68%	-4	1%	-1
EURO AREA	30%	+2	69%	-2	1%	=
NON-EURO AREA	33%	+10	65%	-10	2%	=
DK	74%	+16	24%	-17	2%	+1
UK	38%	+14	60%	-14	2%	=
PL	35%	+13	61%	-14	4%	+1
IE	18%	+11	81%	-11	1%	=
BE	43%	+10	56%	-11	1%	+1
MT	71%	+9	19%	-9	10%	=
HU	22%	+7	77%	-7	1%	=
NL	40%	+6	60%	-5	0%	-1
RO	14%	+6	85%	-5	1%	-1
DE	82%	+5	16%	-5	2%	=
SE	85%	+5	14%	-5	1%	=
EE	44%	+3	54%	-3	2%	=
ES	4%	+3	96%	-3	0%	=
SK	14%	+3	85%	-3	1%	=
BG	5%	+2	94%	-1	1%	-1
SI	6%	+2	94%	-2	0%	=
CZ	15%	+1	85%	-1	0%	=
FR	7%	+1	91%	-1	2%	=
CY	3%	+1	97%	-1	0%	=
LV	21%	+1	77%	-1	2%	=
EL	2%	=	98%	=	0%	=
HR	3%	=	96%	-1	1%	+1
IT	7%	=	93%	=	0%	=
PT	3%	-1	96%	=	1%	+1
LT	27%	-2	70%	+1	3%	+1
LU	72%	-3	26%	+2	2%	+1
AT	60%	-3	39%	+3	1%	=
FI	47%	-6	53%	+7	0%	-1

2.1.2. The employment situation

Although a very large majority of Europeans remain negative about the employment situation in their country, perceptions have improved slightly since the Standard Eurobarometer survey of spring 2013 (EB79): for one in five Europeans it is "good" (20%, +1 percentage point since spring 2013), while 78% say it is "bad" (-2).

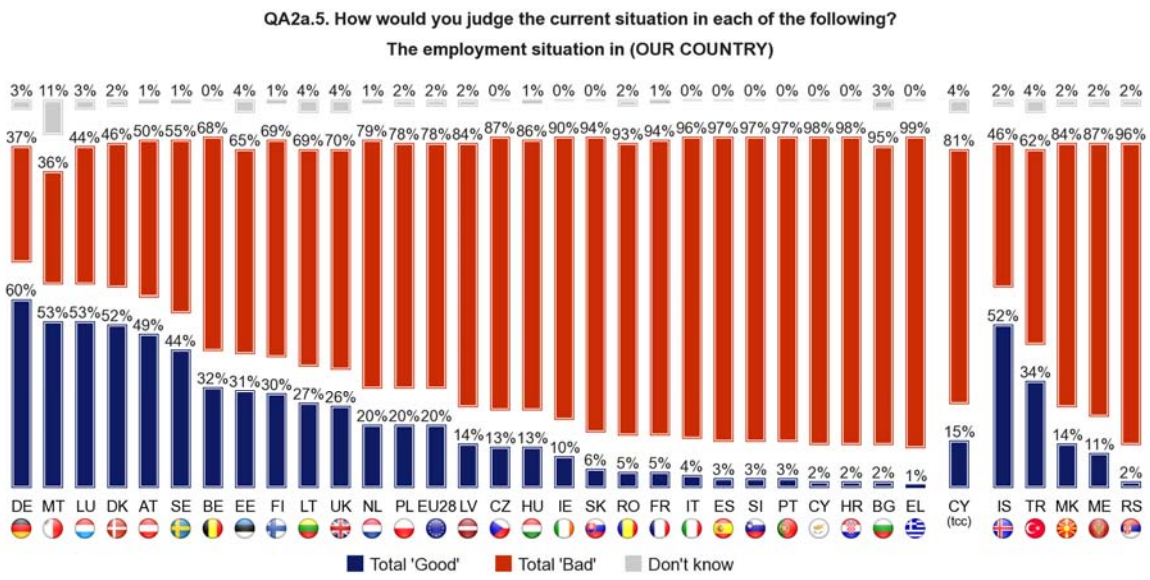


In four Member States, a **majority of respondents are positive about the national employment situation**: Germany (60%), Malta (53%), Luxembourg (53%) and Denmark (52%).

However, **respondents are predominantly negative in 24 countries, and the percentage of negative answers reaches 90% or more in 12 of them**: Greece (99%), Cyprus (98%), Croatia (98%), Spain (97%), Portugal and Slovenia (both 97%), Italy (96%), Bulgaria (95%), France (94%) and Slovakia (94%), Romania (93%) and Ireland (90%).

Positive perceptions have **improved the most strikingly** in Denmark (52%, +17 percentage points), Sweden (44%, +11) and Poland (20, +11) since spring. In total, the national employment situation is thought to have improved in 18 Member States. In contrast, perceptions have deteriorated the most sharply in Austria (49%, -7) and Finland (30%, -5).

In the candidate countries, only respondents in Iceland are predominantly positive about the national employment situation (52% described it as "good", -3 percentage points). However, respondents in Serbia are overwhelmingly negative (96% of "bad" answers, +4, versus 2%, -3).



2.2. Expectations for the next twelve months

- Respondents are slightly more upbeat about the economic and employment outlook -

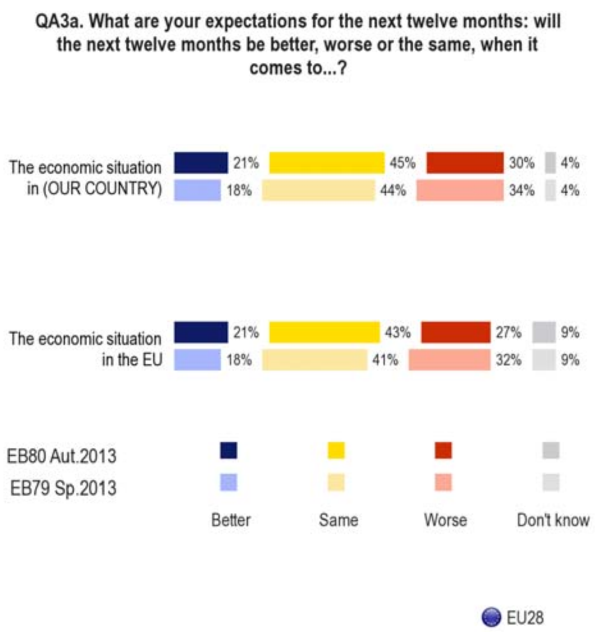
2.2.1. The national and European situations

Although respondents are now more optimistic about the outlook for the national and European economic situations over the next twelve months, pessimists still outnumber optimists.

Just over a fifth of Europeans believe that **their country's economic situation** will improve over the next twelve months (21%, +3 percentage points since the Standard Eurobarometer survey of spring 2013), while the proportion of respondents who expect the situation to deteriorate has decreased (30%, -4).

This trend is mirrored in forecasts for the **economic situation in the EU**: 21% of respondents believe that the situation will improve (+3 percentage points), while fewer expect it to be worse (27%, -5).

All in all, the dominant view is still that things will stay the same, both nationally (45%, +1 percentage point) and in the EU (43%, +2).



Respondents in Denmark (44%, +8 percentage points), the Netherlands (42%, +19) and Malta (42%, +7) are the most optimistic about the national economic outlook for the next twelve months. In these three countries, optimism has gained significant ground since spring 2013. This is also now the majority view in Malta and the Netherlands: this is the first time since spring 2011 (EB75) that, in some countries, a majority of respondents think that the national economic situation will improve over the next twelve months. Between spring 2011 (EB75) and spring 2013 (EB79), in all the EU Member States, optimists were always outnumbered by those who expected the economy to be "the same" or "worse".

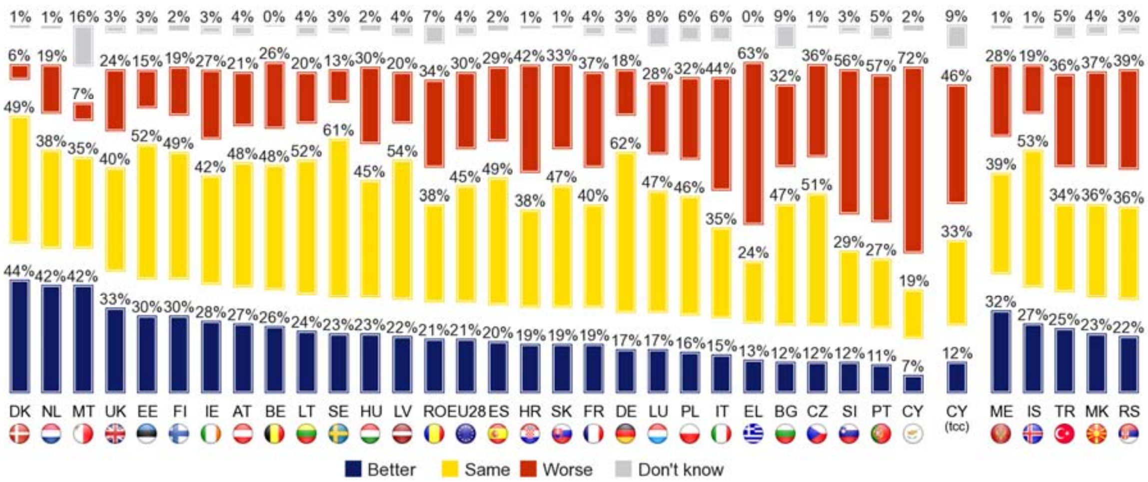
The impression that the next twelve months will be better for the **national economy** has also gained significant ground in Ireland (28%, +8 percentage points), the United Kingdom (33%, +7), Belgium (26%, +6) and Hungary (23%, +6).

In six countries, a majority of respondents think that the economic situation in their country will be "worse" over the next twelve months: Cyprus (72%, +5 percentage points), Greece (63%, +1), Portugal (57%, -5), Slovenia (56%, -8), Italy (44%, +3) and Croatia (42%, +3).

Respondents in the five candidate countries are more optimistic than the European Union average. However, confidence in the future of the national economy has plummeted in Iceland: the proportion who think that the next twelve months will be "better" has fallen sharply (27%, -19 percentage points). Expectations have also deteriorated sharply in Turkey (25%, -9).

QA3a.2. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

The economic situation in (OUR COUNTRY)



QA3a.2. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?
The economic situation in (OUR COUNTRY)

	Better	Diff. Aut.2013-Sp.2013	Same	Diff. Aut.2013-Sp.2013	Worse	Diff. Aut.2013-Sp.2013	Don't know	Diff. Aut.2013-Sp.2013
EU28	21%	+3	45%	+1	30%	-4	4%	=
EURO AREA	19%	+2	45%	+1	32%	-4	4%	+1
NON-EURO AREA	24%	+3	44%	-1	28%	-2	4%	=
NL	42%	+19	38%	-6	19%	-13	1%	=
DK	44%	+8	49%	-5	6%	-3	1%	=
IE	28%	+8	42%	+4	27%	-13	3%	+1
MT	42%	+7	35%	-2	7%	=	16%	-5
UK	33%	+7	40%	-5	24%	-1	3%	-1
BE	26%	+6	48%	+6	26%	-12	0%	=
HU	23%	+6	45%	-2	30%	-4	2%	=
ES	20%	+5	49%	+3	29%	-8	2%	=
FI	30%	+5	49%	-5	19%	=	2%	=
PT	11%	+4	27%	+2	57%	-5	5%	-1
DE	17%	+3	62%	+3	18%	-5	3%	-1
AT	27%	+3	48%	-3	21%	-1	4%	+1
PL	16%	+3	46%	+4	32%	-8	6%	+1
SI	12%	+3	29%	+4	56%	-8	3%	+1
SK	19%	+3	47%	+3	33%	-5	1%	-1
EL	13%	+2	24%	-2	63%	+1	0%	-1
FR	19%	+2	40%	+1	37%	-2	4%	-1
RO	21%	+2	38%	-6	34%	+3	7%	+1
CZ	12%	+1	51%	+8	36%	-9	1%	=
EE	30%	+1	52%	=	15%	-1	3%	=
HR	19%	-1	38%	-1	42%	+3	1%	-1
LU	17%	-2	47%	+2	28%	-6	8%	+6
BG	12%	-3	47%	+5	32%	=	9%	-2
CY	7%	-4	19%	+1	72%	+5	2%	-2
LV	22%	-4	54%	=	20%	+4	4%	=
SE	23%	-4	61%	+6	13%	-3	3%	+1
IT	15%	-5	35%	+1	44%	+3	6%	+1
LT	24%	-6	52%	+2	20%	+5	4%	-1

The differences between countries regarding **expectations for the European economic situation** are less pronounced than in the case of national forecasts.

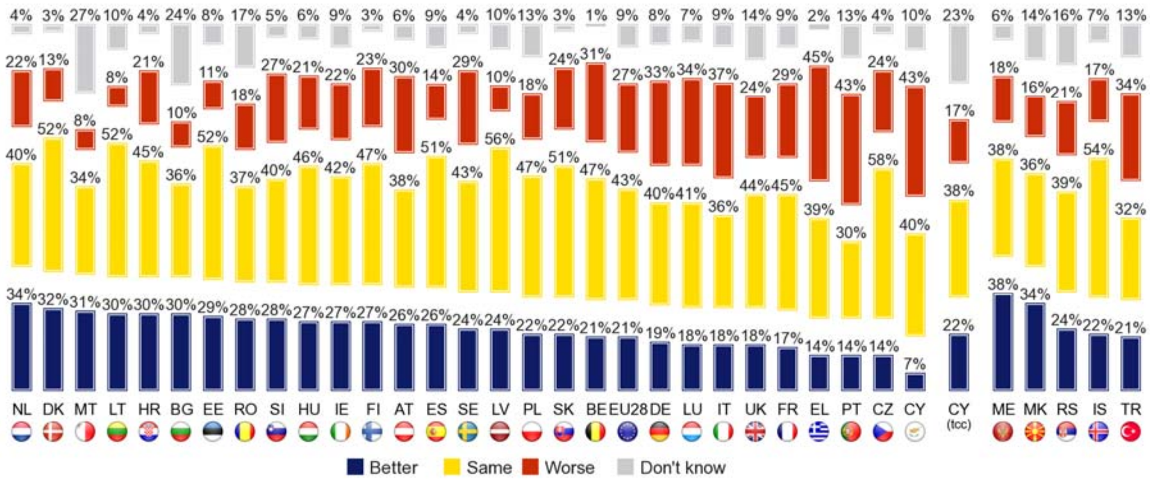
The same three countries are the most upbeat about the outlook for the European economic situation over the next twelve months, again with significant evolutions since spring 2013: the Netherlands (34%, +17 percentage points), Denmark (32%, +6) and Malta (31%, +7).

Optimism has also gained significant ground in Ireland (27%, +9), Finland (27%, +9), Slovenia (28%, +8) and Spain (26%, +6).

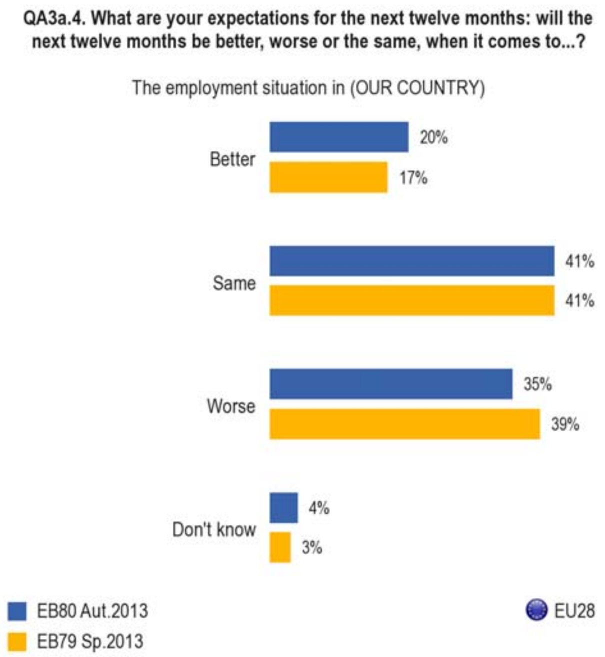
Optimism levels in the candidate countries are equal to or higher than the European average. Respondents in Montenegro are the most likely to expect the European economic situation to improve (38% answered "better", -4 percentage points), while respondents in Turkey are the least likely to agree (21%, -2). In the Former Yugoslav Republic of Macedonia, despite a high score, optimism has declined sharply (34%, -7).

QA3a.6. What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

The economic situation in the EU



2.2.2. The employment situation

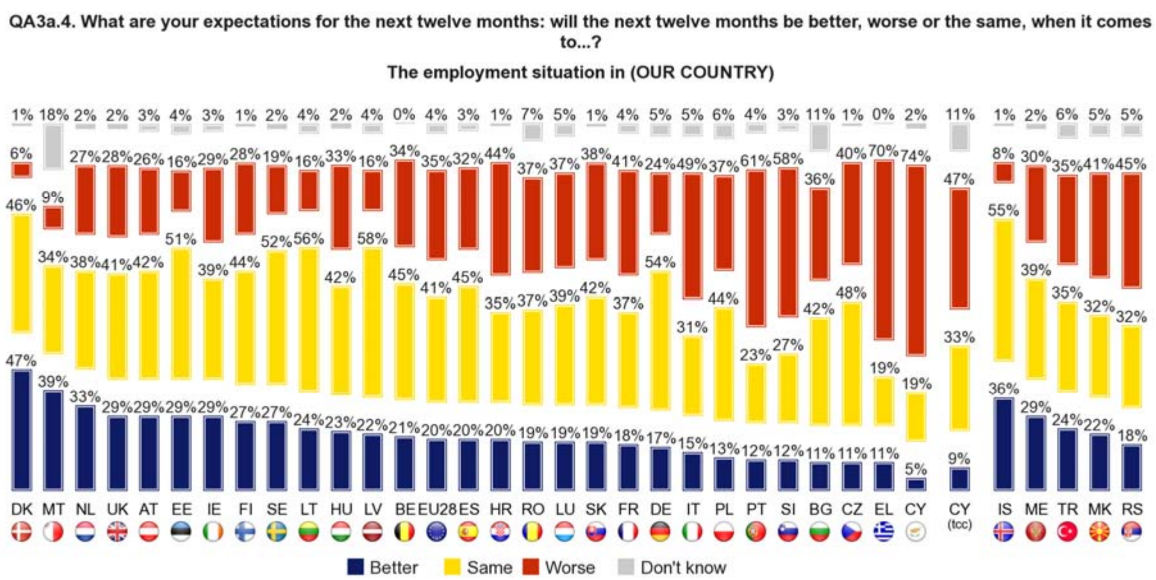


Europeans are now more optimistic in their forecasts for the national employment situation over the next twelve months: the proportion of optimists has increased (20%, +3 percentage points since spring 2013) and the proportion of pessimists has fallen (35%, -4). However, the predominant impression is still that the situation will stay the same (41%, unchanged).

Once again respondents are the most positive in Denmark, with a sharp increase in optimism since spring 2013 (47%, +11 percentage points), followed by Malta (39%, +6) and the Netherlands (33%, +18). The proportion of "better" answers has also increased significantly in Ireland (29%, +12).

Respondents in Cyprus (5%, -1 percentage point), Bulgaria (11%, -4), the Czech Republic (11%, +3) and Greece (11%, unchanged) are the least optimistic about the national employment situation.

In the candidate countries, the proportion of optimists has fallen sharply in Iceland (36%, -18 percentage points), but respondents are still more optimistic there in Montenegro (29%, -2), Turkey (24%, -3), the Former Yugoslav Republic of Macedonia (22%, -1) and Serbia (18%, -1).



2.3. The main concerns at national level

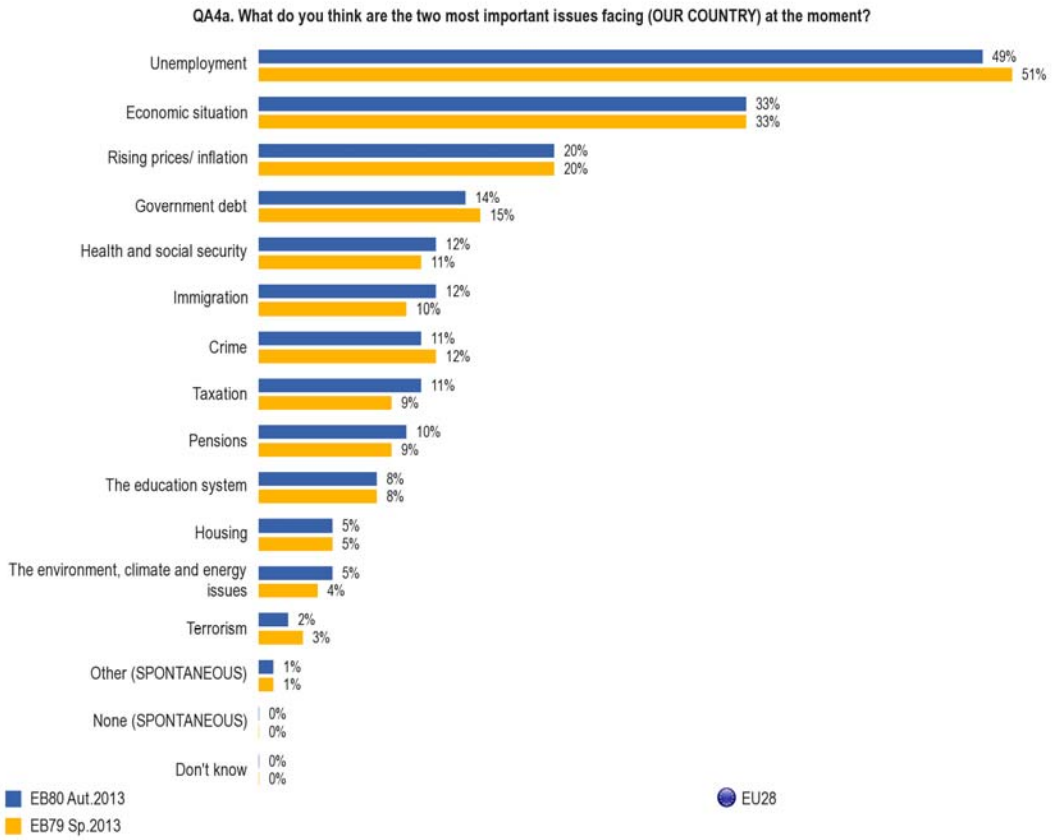
- Unemployment and the economic situation remain the most pressing national concerns -

The order in which Europeans rank their concerns has changed little since spring 2013.

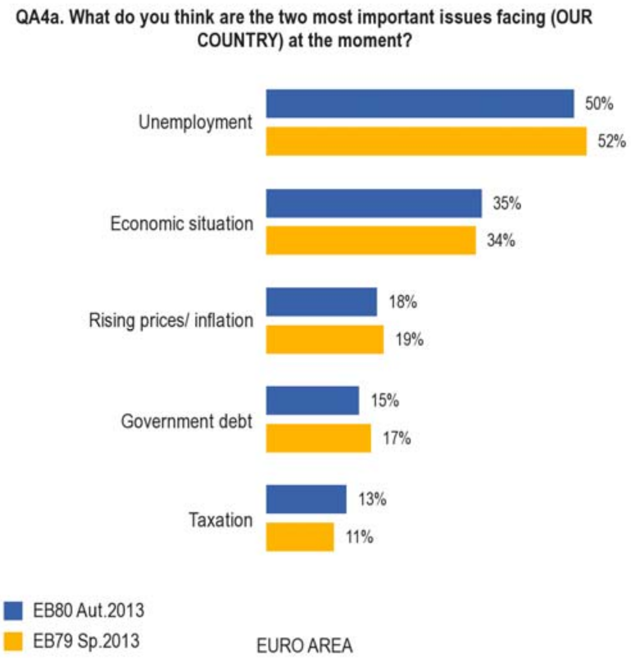
Unemployment remains the most frequently mentioned concern, albeit with a slightly lower score than in the Eurobarometer survey of spring 2013 (49%, -2 percentage points). This is the first time that the score for this item has fallen since the Standard Eurobarometer survey of autumn 2011 (EB76). **The economic situation** still gives concern to a third of Europeans (33%, unchanged). In third place, concerns about **rising prices** remain unchanged (20%, =). Next, with a small decrease, respondents mentioned **government debt** (14%, -1 percentage point). The top four concerns at national level therefore continue to relate to the economy.

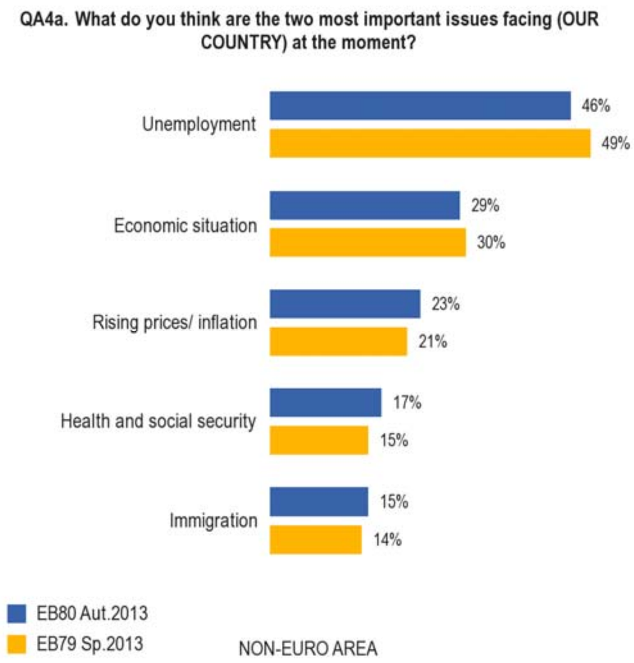
Next, with similar scores, respondents mentioned **health and social security** (12%, +1 percentage point) and **immigration**, which continues to gain ground (12%, +2 versus spring 2013, +4 versus autumn 2012). Concerns about **crime** have eased slightly (11%, -1), while mentions of **taxation** have increased (11%, +2).

Respondents then mentioned **pensions** (10%, +1 percentage point) and the **education system** (8%, unchanged), while **housing** (5%, =), **the environment** (5%, +1) and **terrorism** (2%, -1) bring up the rear.

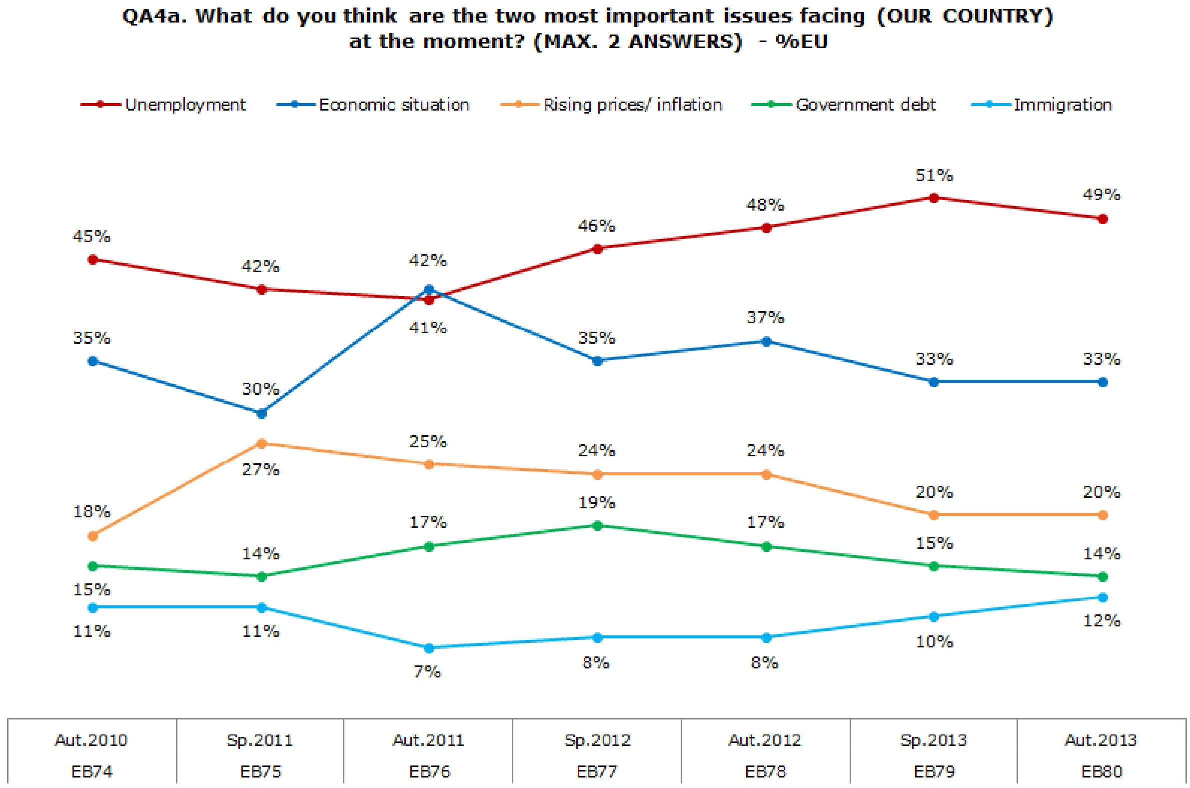


Maximum two answers





Five most frequently mentioned items in the euro area and outside the euro area



Five most frequently mentioned items

An analysis by country does not reveal any significant differences between the euro area and non-euro area countries.

In 22 Member States, **unemployment** tops the list of national concerns, with the highest scores in Cyprus (77%), Croatia and Spain (both 74%), Portugal (71%), Ireland and Greece (both 65%), Poland (63%) and Slovakia (61%). Respondents in Malta are the least likely to see unemployment as a major national issue (11%).

Nevertheless, **concerns about unemployment have fallen sharply** in several countries: Denmark (45%, -16 percentage points since spring 2013), Bulgaria (50%, -13), Lithuania (37%, -9) and Sweden (57%, -8).

The highest score for the economic situation was also recorded in Cyprus (74%, -1 percentage point). This is the main concern in the Netherlands (53%, +3) and Romania (41%, -3). In contrast, in Germany only 13% (-2) of respondents mentioned this item. Concerns about the economic situation have decreased significantly in Slovenia (46%, -11), Malta (19%, -9) and Bulgaria (43%, -8), but have gained ground in Finland (32%, +8).

Rising prices are the main national concern in Estonia (50%), Lithuania (40%) and, to a lesser extent, in Germany (25%).

In Malta, **immigration** remains the main concern; after reaching a very high level in spring 2013, the number of respondents mentioning this item has rocketed even higher (63%, +34 percentage points).

The other items are not seen as priority issues. However, we found that:

- For the first time since the Standard Eurobarometer survey of autumn 2010 (EB74), **government debt** is no longer the most frequently mentioned item in Germany: however, with a score of 23%, this item is still ranked in second place (-6 percentage points);
- **Taxation** is frequently mentioned by respondents in Slovenia (30%, +16 percentage points) and Italy (27%, +4);
- As has been the case for some time, respondents in Luxembourg are the most likely to see **housing** as an important issue nationally (38%, +13 percentage points). This theme is ranked in second place after unemployment.
- Respondents in Germany are particularly worried about **pensions** (19%, +1 percentage point), nine percentage points above the European average;
- **Crime** is a cause of concern for a quarter of respondents in Croatia (25%, +4 percentage points). This item is ranked in third place, behind unemployment and the economic situation; in comparison, it was mentioned by 11% of Europeans as a whole (-1), in seventh place.

In the candidate countries, unemployment is the main concern, except in Iceland, where the issue of health and social security tops the list (59%, +19 percentage points). In Montenegro, unemployment (48%, +14) is ranked in joint first place with the economic situation (48%, -3). Terrorism continues to be taken particularly seriously by respondents in Turkey, despite a sharp decline (36%, -16).

QA4a. What do you think are the two most important issues facing (OUR COUNTRY) at the moment?

	Unemployment	Economic situation	Rising prices/ inflation	Government debt	Health and social security	Immigration	Crime	Taxation	Pensions	The education system	Housing	The environment, climate and energy issues	Terrorism
EU28	49%	33%	20%	14%	12%	12%	11%	11%	10%	8%	5%	5%	2%
BE	43%	30%	18%	18%	6%	16%	17%	17%	13%	4%	6%	5%	1%
BG	50%	43%	19%	1%	22%	23%	16%	2%	8%	4%	1%	2%	1%
CZ	46%	35%	30%	21%	13%	2%	13%	6%	16%	2%	3%	3%	1%
DK	45%	36%	7%	6%	22%	17%	19%	5%	3%	16%	2%	15%	2%
DE	20%	13%	25%	23%	12%	16%	12%	7%	19%	20%	7%	15%	2%
EE	31%	33%	50%	1%	25%	2%	7%	10%	13%	10%	0%	2%	0%
IE	65%	40%	13%	16%	15%	9%	14%	13%	3%	4%	4%	1%	1%
EL	65%	52%	7%	15%	8%	5%	13%	20%	3%	2%	1%	0%	3%
ES	74%	48%	9%	7%	11%	2%	6%	5%	6%	8%	4%	1%	1%
FR	59%	37%	15%	13%	7%	12%	16%	13%	8%	5%	6%	5%	1%
HR	74%	47%	13%	18%	3%	1%	25%	3%	5%	1%	1%	0%	0%
IT	56%	42%	22%	11%	3%	8%	6%	27%	4%	1%	2%	1%	1%
CY	77%	74%	5%	11%	1%	5%	9%	5%	1%	1%	1%	1%	0%
LV	48%	37%	26%	5%	18%	11%	6%	19%	10%	7%	2%	0%	0%
LT	37%	31%	40%	8%	9%	8%	19%	23%	7%	4%	2%	3%	0%
LU	49%	20%	15%	12%	4%	11%	9%	7%	7%	13%	38%	5%	1%
HU	53%	36%	29%	11%	15%	2%	15%	6%	7%	3%	5%	2%	1%
MT	11%	19%	19%	15%	11%	63%	9%	6%	13%	3%	6%	15%	1%
AT	35%	28%	31%	24%	11%	13%	10%	9%	12%	14%	3%	5%	2%
NL	48%	53%	7%	13%	31%	4%	10%	6%	11%	7%	3%	4%	1%
PL	63%	23%	32%	12%	17%	3%	4%	6%	11%	2%	3%	1%	1%
PT	71%	39%	22%	14%	9%	1%	3%	14%	8%	3%	1%	0%	1%
RO	33%	41%	34%	8%	18%	1%	18%	12%	14%	8%	4%	1%	1%
SI	50%	46%	10%	18%	6%	0%	17%	30%	6%	2%	1%	1%	0%
SK	61%	34%	32%	11%	18%	1%	8%	6%	9%	4%	4%	3%	1%
FI	49%	32%	12%	26%	34%	5%	5%	6%	8%	4%	4%	8%	0%
SE	57%	18%	1%	1%	35%	13%	9%	3%	4%	31%	5%	21%	1%
UK	35%	23%	18%	14%	15%	33%	15%	6%	8%	7%	10%	6%	4%
CY (tcc)	37%	49%	37%	15%	11%	6%	14%	10%	5%	7%	4%	1%	1%
MK	64%	45%	22%	5%	5%	6%	20%	5%	3%	3%	2%	2%	1%
IS	9%	46%	22%	18%	59%	2%	5%	6%	1%	8%	15%	7%	0%
ME	48%	48%	17%	11%	5%	1%	34%	8%	2%	3%	5%	1%	2%
RS	55%	50%	18%	6%	4%	1%	38%	5%	3%	2%	3%	0%	1%
TR	43%	31%	15%	4%	4%	7%	17%	9%	8%	9%	4%	1%	36%

Highest percentage per country	*Lowest percentage per country*
Highest percentage per item	Lowest percentage per item

Maximum two answers

QA4a. What do you think are the two most important issues facing (OUR COUNTRY) at the moment?

	Unemployment	Economic situation	Rising prices/ inflation	Government debt	Health and social security	Immigration	Crime	Taxation	Pensions	The education system	Housing	The environment, climate and energy issues	Terrorism
EU28	49%	33%	20%	14%	12%	12%	11%	11%	10%	8%	5%	5%	2%
BE	43%	30%	18%	18%	6%	16%	17%	17%	13%	4%	6%	5%	1%
BG	50%	43%	19%	1%	22%	23%	16%	2%	8%	4%	1%	2%	1%
CZ	46%	35%	30%	21%	13%	2%	13%	6%	16%	2%	3%	3%	1%
DK	45%	36%	7%	6%	22%	17%	19%	5%	3%	16%	2%	15%	2%
DE	20%	13%	25%	23%	12%	16%	12%	7%	19%	20%	7%	15%	2%
EE	31%	33%	50%	1%	25%	2%	7%	10%	13%	10%	0%	2%	0%
IE	65%	40%	13%	16%	15%	9%	14%	13%	3%	4%	4%	1%	1%
EL	65%	52%	7%	15%	8%	5%	13%	20%	3%	2%	1%	0%	3%
ES	74%	48%	9%	7%	11%	2%	6%	5%	6%	8%	4%	1%	1%
FR	59%	37%	15%	13%	7%	12%	16%	13%	8%	5%	6%	5%	1%
HR	74%	47%	13%	18%	3%	1%	25%	3%	5%	1%	1%	0%	0%
IT	56%	42%	22%	11%	3%	8%	6%	27%	4%	1%	2%	1%	1%
CY	77%	74%	5%	11%	1%	5%	9%	5%	1%	1%	1%	1%	0%
LV	48%	37%	26%	5%	18%	11%	6%	19%	10%	7%	2%	0%	0%
LT	37%	31%	40%	8%	9%	8%	19%	23%	7%	4%	2%	3%	0%
LU	49%	20%	15%	12%	4%	11%	9%	7%	7%	13%	38%	5%	1%
HU	53%	36%	29%	11%	15%	2%	15%	6%	7%	3%	5%	2%	1%
MT	11%	19%	19%	15%	11%	63%	9%	6%	13%	3%	6%	15%	1%
AT	35%	28%	31%	24%	11%	13%	10%	9%	12%	14%	3%	5%	2%
NL	48%	53%	7%	13%	31%	4%	10%	6%	11%	7%	3%	4%	1%
PL	63%	23%	32%	12%	17%	3%	4%	6%	11%	2%	3%	1%	1%
PT	71%	39%	22%	14%	9%	1%	3%	14%	8%	3%	1%	0%	1%
RO	33%	41%	34%	8%	18%	1%	18%	12%	14%	8%	4%	1%	1%
SI	50%	46%	10%	18%	6%	0%	17%	30%	6%	2%	1%	1%	0%
SK	61%	34%	32%	11%	18%	1%	8%	6%	9%	4%	4%	3%	1%
FI	49%	32%	12%	26%	34%	5%	5%	6%	8%	4%	4%	8%	0%
SE	57%	18%	1%	1%	35%	13%	9%	3%	4%	31%	5%	21%	1%
UK	35%	23%	18%	14%	15%	33%	15%	6%	8%	7%	10%	6%	4%

1st MOST FREQUENTLY MENTIONED ITEM
2nd MOST FREQUENTLY MENTIONED ITEM
3rd MOST FREQUENTLY MENTIONED ITEM

Maximum two answers

2.4. The main concerns at European level

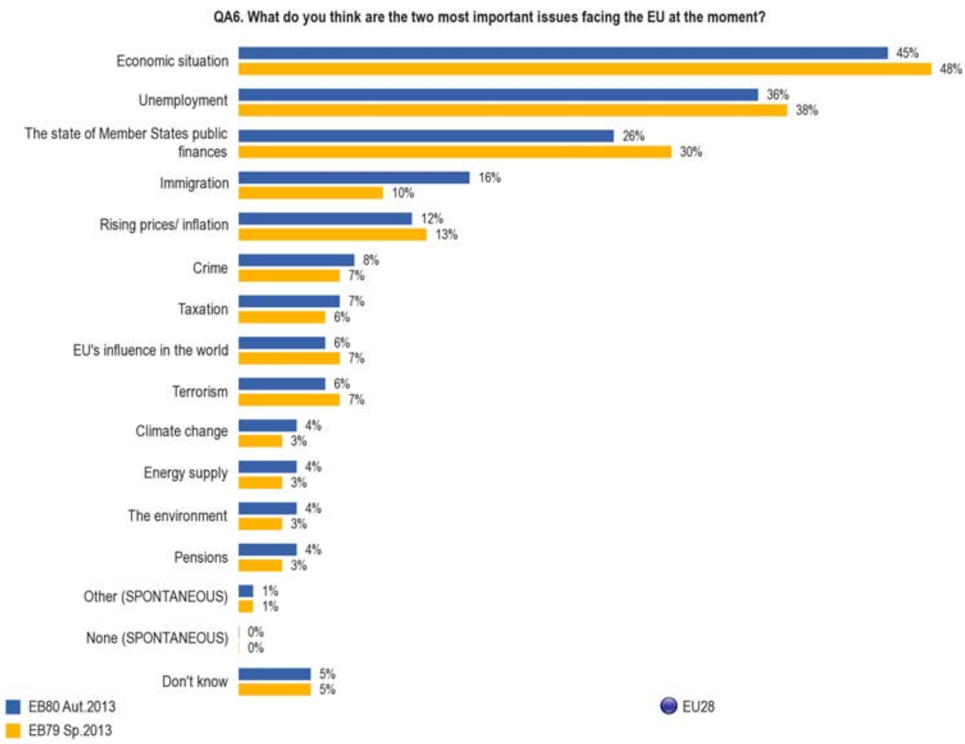
- Economic issues continue to dominate at European level, but have lost ground; concerns about immigration have increased significantly -

Respondents believe that the most important issue currently facing the European Union is the **economic situation** (45%, -3 percentage points). An analysis of the longer-term trend shows that this item has lost 14 percentage points since the Standard Eurobarometer survey of autumn 2011 (EB76). **Unemployment** remains in second place (36%, -2 percentage points), ahead of the **state of the public finances of the Member States**, mentioned by a quarter of Europeans (26%, -4). Concerns at EU level continue to be dominated by economic issues, but the score for each of these items has fallen since spring 2013.

Immigration is now ranked in fourth place, after a sharp rise (16%, +6 percentage points).

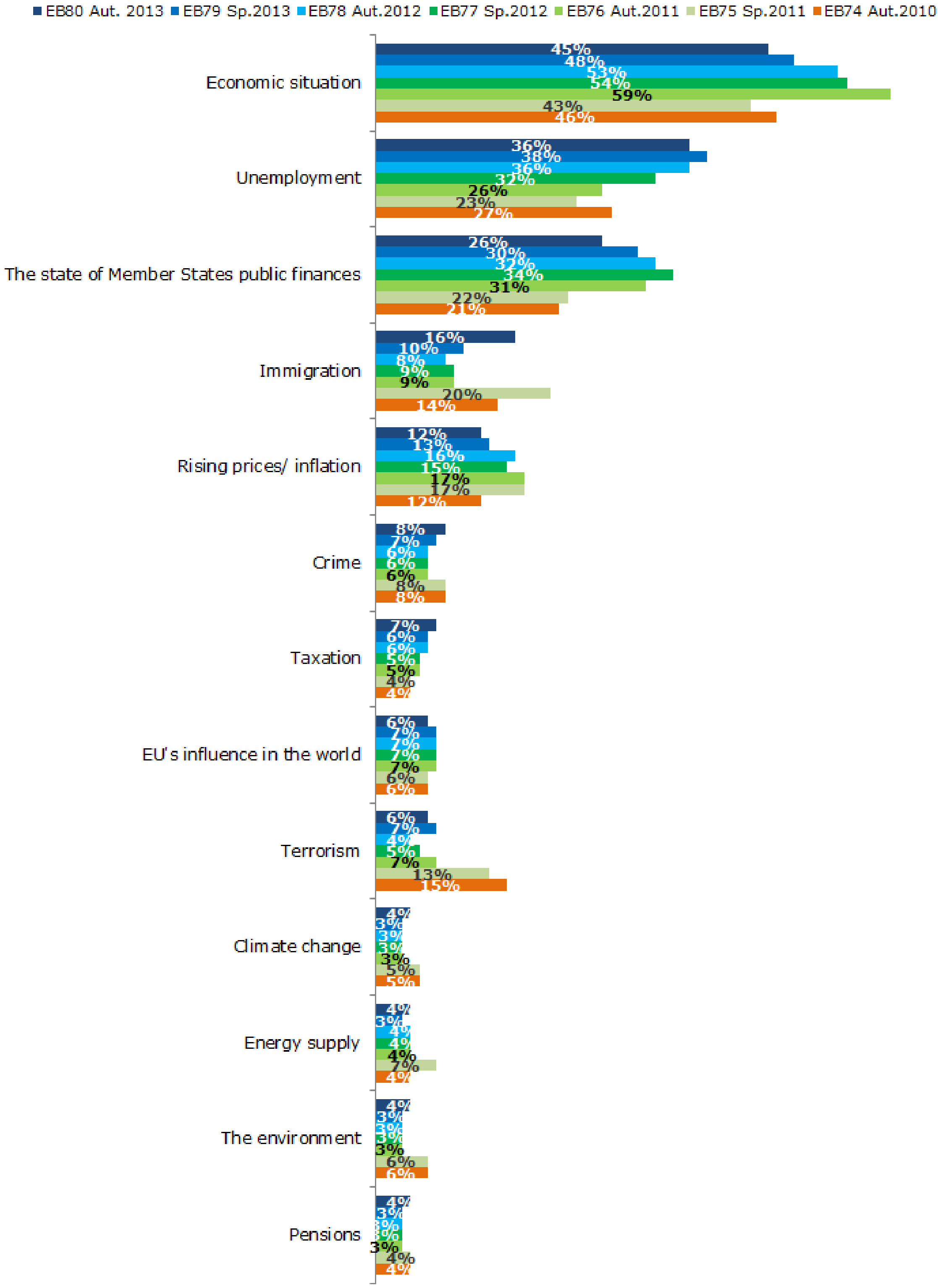
Next, respondents mentioned **rising prices,** albeit with a slightly lower score than in spring 2013 (12%, -1 percentage point).

The other items were mentioned by fewer than 10% of Europeans and reveal very few changes since spring 2013: concerns about **crime** (8%, +1 percentage point) and **taxation** (7%, +1) have gained ground. Next, with equal scores, respondents mentioned the **EU's influence in the world** (6%, -1) and **terrorism** (6%, -1). Lastly, **climate change** (4%, +1), **energy supplies** (4%, +1), **the environment** (4%, +1) and **pensions** (4%, +1) trail behind, but have all gained ground since spring 2013.

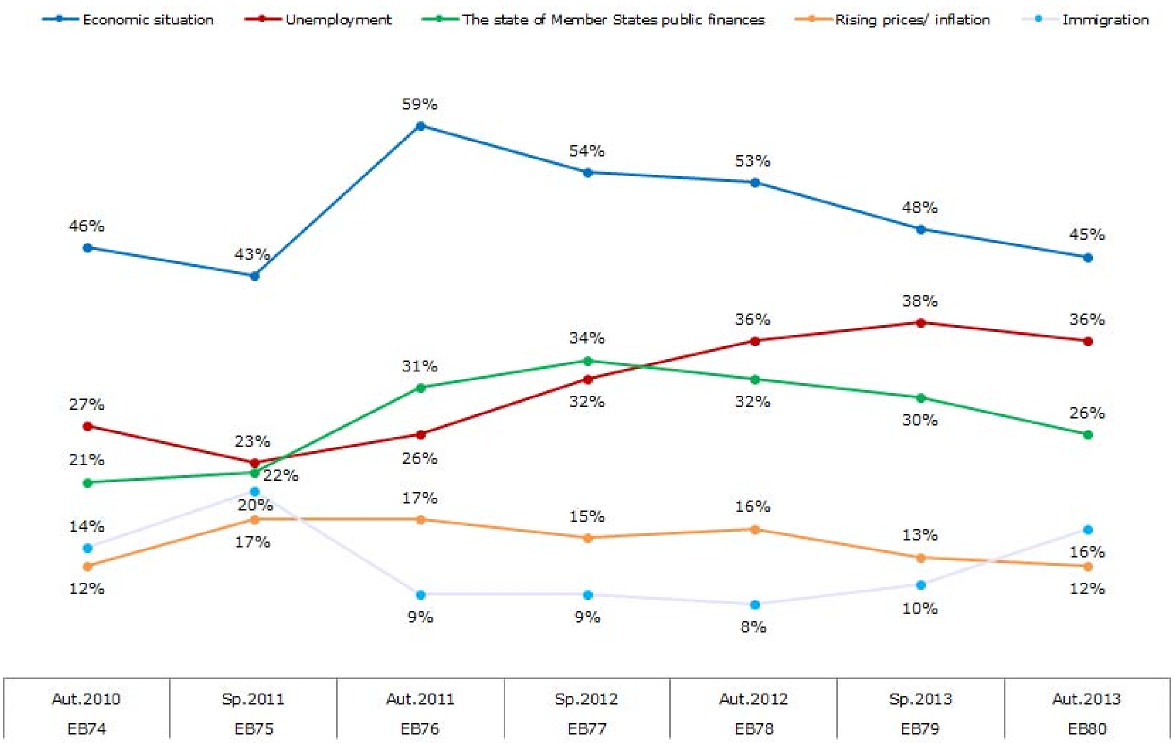


Maximum two answers

QA6. What do you think are the two most important issues facing the European Union at the moment? (MAX. 2 ANSWERS) - %EU



QA6. What do you think are the two most important issues facing the European Union at the moment? (MAX. 2 ANSWERS) - %EU



Five most frequently mentioned items

The order in which respondents rank the most important issues facing the European Union varies only slightly between the euro area and non-euro area countries, but the three most frequently mentioned items obtained higher scores in the euro area than outside it: the economic situation (47%, versus 41% for the non-euro area), unemployment (39% versus 30%) and the state of the public finances of the Member States (29% versus 22%).

The economic situation is seen as the main issue facing the European Union in 22 Member States, led by the Netherlands (63%, -4 percentage points), Spain (58%, +2), Cyprus (57%, -2), Ireland (+5) and Sweden (55%, -9). Respondents in Poland are the least likely to mention the economic situation (36%, -7). There have been some significant evolutions since spring 2013, in particular in Luxembourg where mentions have risen significantly (41%, +7). In contrast, the score for this item has fallen sharply in Denmark (53%, -12) and Malta (43%, -10).

Unemployment is seen as the main issue at European level by respondents in Cyprus (61%, unchanged), Italy (49%, +2 percentage points) and Luxembourg (48%, -4). While not the first item mentioned, unemployment is cited very frequently in Ireland (53%, +3), Denmark (49%, -9) and Portugal (48%, -3). Mentions of this item have fallen sharply in many Member States, led by Sweden (36%, -10), France (33%, -10) and Bulgaria (25%, -10).

The state of the public finances of the Member States was mentioned by almost half the respondents in Austria (48%, -1 percentage point) and Finland (48%, +4). In both countries, and in Germany (432%, -6), this is seen as the main issue at European level. The scores for this item have fallen significantly in Slovenia (33%, -9), Hungary (36%, -8), the Netherlands (35%, -8), Greece (26%, -8) and Spain (21%, -8).

While not the most important issue, **immigration** figures prominently in Malta (40%), far ahead of the other countries after a very sharp increase since spring 2013 (+24 percentage points).

Other points of note:

- The other items are mentioned less often. However, respondents in Italy are particularly concerned about **taxation** (21%), with a score that is far higher than the European average (after Italy, the next highest scores were recorded in Ireland and Lithuania at 10%);

- Respondents in Sweden stand out because they are far more likely than other Europeans to mention **climate change** (21%, +7 percentage points, far ahead of Denmark, on 12%, +3) and the environment (18%, +2);

- Respondents in Bulgaria are particularly focused on **terrorism** (17%), while respondents in Romania are particularly worried about crime (19%).

QA6. What do you think are the two most important issues facing the EU at the moment?

	Economic situation	Unem-ployment	The state of Member States public finances	Immigration	Rising prices/ inflation	Crime	Taxation	EU's influence in the world	Terrorism	Climate change	Energy supply	The environ-ment	Pensions
EU28	45%	36%	26%	16%	12%	8%	7%	6%	6%	4%	4%	4%	4%
BE	48%	36%	26%	21%	11%	11%	6%	7%	7%	4%	4%	3%	7%
BG	53%	25%	14%	27%	8%	12%	1%	8%	17%	4%	3%	4%	1%
CZ	43%	28%	37%	13%	14%	7%	3%	10%	8%	2%	5%	5%	5%
DK	53%	49%	22%	19%	2%	10%	0%	6%	6%	12%	2%	10%	1%
DE	37%	32%	43%	22%	12%	9%	3%	5%	4%	7%	7%	3%	4%
EE	43%	19%	33%	22%	13%	7%	5%	8%	7%	2%	5%	4%	2%
IE	55%	53%	22%	8%	16%	7%	10%	6%	4%	2%	2%	4%	3%
EL	52%	46%	26%	15%	8%	11%	7%	10%	8%	1%	2%	3%	2%
ES	58%	46%	21%	8%	9%	5%	8%	5%	2%	2%	1%	1%	4%
FR	48%	33%	28%	23%	12%	5%	4%	8%	6%	4%	5%	10%	4%
HR	48%	46%	28%	10%	11%	14%	2%	4%	4%	5%	2%	2%	1%
IT	44%	49%	14%	16%	17%	6%	21%	4%	4%	1%	1%	2%	3%
CY	57%	61%	28%	12%	4%	15%	3%	4%	3%	2%	1%	2%	1%
LV	42%	22%	32%	20%	11%	8%	7%	5%	5%	3%	3%	3%	3%
LT	42%	26%	20%	14%	14%	13%	10%	3%	7%	4%	6%	2%	2%
LU	41%	48%	25%	18%	11%	10%	6%	6%	6%	6%	2%	3%	4%
HU	44%	32%	36%	10%	13%	9%	3%	8%	6%	5%	7%	3%	5%
MT	43%	31%	28%	40%	6%	11%	2%	4%	4%	3%	4%	3%	4%
AT	44%	32%	48%	18%	13%	6%	5%	8%	3%	5%	5%	5%	4%
NL	63%	39%	35%	12%	5%	7%	2%	11%	5%	4%	2%	4%	2%
PL	36%	32%	20%	9%	17%	5%	5%	5%	8%	4%	3%	4%	4%
PT	53%	48%	30%	3%	13%	5%	7%	3%	1%	1%	1%	0%	4%
RO	41%	26%	18%	12%	18%	19%	8%	9%	8%	4%	4%	4%	6%
SI	50%	41%	33%	10%	6%	13%	5%	5%	2%	3%	2%	2%	2%
SK	46%	36%	34%	8%	17%	9%	6%	9%	8%	3%	3%	6%	3%
FI	37%	34%	48%	11%	10%	8%	3%	11%	6%	11%	5%	7%	2%
SE	55%	36%	28%	16%	1%	4%	1%	7%	3%	21%	6%	18%	0%
UK	38%	27%	20%	23%	11%	8%	4%	7%	8%	4%	8%	2%	3%

Highest percentage per country	*Lowest percentage per country*
Highest percentage per item	Lowest percentage per item

Maximum two answers

QA6. What do you think are the two most important issues facing the EU at the moment?

	Economic situation	Unemploy-ment	The state of Member States public finances	Immi-gration	Rising prices/ inflation	Crime	Taxation	EU's influence in the world	Terrorism	Climate change	Energy supply	The environ-ment	Pensions
EU28	45%	36%	26%	16%	12%	8%	7%	6%	6%	4%	4%	4%	4%
BE	48%	36%	26%	21%	11%	11%	6%	7%	7%	4%	4%	3%	7%
BG	53%	25%	14%	27%	8%	12%	1%	8%	17%	4%	3%	4%	1%
CZ	43%	28%	37%	13%	14%	7%	3%	10%	8%	2%	5%	5%	5%
DK	53%	49%	22%	19%	2%	10%	0%	6%	6%	12%	2%	10%	1%
DE	37%	32%	43%	22%	12%	9%	3%	5%	4%	7%	7%	3%	4%
EE	43%	19%	33%	22%	13%	7%	5%	8%	7%	2%	5%	4%	2%
IE	55%	53%	22%	8%	16%	7%	10%	6%	4%	2%	2%	4%	3%
EL	52%	46%	26%	15%	8%	11%	7%	10%	8%	1%	2%	3%	2%
ES	58%	46%	21%	8%	9%	5%	8%	5%	2%	2%	1%	1%	4%
FR	48%	33%	28%	23%	12%	5%	4%	8%	6%	4%	5%	10%	4%
HR	48%	46%	28%	10%	11%	14%	2%	4%	4%	5%	2%	2%	1%
IT	44%	49%	14%	16%	17%	6%	21%	4%	4%	1%	1%	2%	3%
CY	57%	61%	28%	12%	4%	15%	3%	4%	3%	2%	1%	2%	1%
LV	42%	22%	32%	20%	11%	8%	7%	5%	5%	3%	3%	3%	3%
LT	42%	26%	20%	14%	14%	13%	10%	3%	7%	4%	6%	2%	2%
LU	41%	48%	25%	18%	11%	10%	6%	6%	6%	6%	2%	3%	4%
HU	44%	32%	36%	10%	13%	9%	3%	8%	6%	5%	7%	3%	5%
MT	43%	31%	28%	40%	6%	11%	2%	4%	4%	3%	4%	3%	4%
AT	44%	32%	48%	18%	13%	6%	5%	8%	3%	5%	5%	5%	4%
NL	63%	39%	35%	12%	5%	7%	2%	11%	5%	4%	2%	4%	2%
PL	36%	32%	20%	9%	17%	5%	5%	5%	8%	4%	3%	4%	4%
PT	53%	48%	30%	3%	13%	5%	7%	3%	1%	1%	1%	0%	4%
RO	41%	26%	18%	12%	18%	19%	8%	9%	8%	4%	4%	4%	6%
SI	50%	41%	33%	10%	6%	13%	5%	5%	2%	3%	2%	2%	2%
SK	46%	36%	34%	8%	17%	9%	6%	9%	8%	3%	3%	6%	3%
FI	37%	34%	48%	11%	10%	8%	3%	11%	6%	11%	5%	7%	2%
SE	55%	36%	28%	16%	1%	4%	1%	7%	3%	21%	6%	18%	0%
UK	38%	27%	20%	23%	11%	8%	4%	7%	8%	4%	8%	2%	3%

1st MOST FREQUENTLY MENTIONED ITEM
2nd MOST FREQUENTLY MENTIONED ITEM
3rd MOST FREQUENTLY MENTIONED ITEM

Maximum two answers

If we summarise the major concerns of Europeans at personal, national and European levels, a clear pattern emerges:

- Rising prices are the most important **personal issue** for Europeans (40%, -1 percentage point since spring 2013, and -4 since autumn 2012). This is a problem which affects daily life and is less compelling at national (20%, unchanged) and European levels (12%, -1).

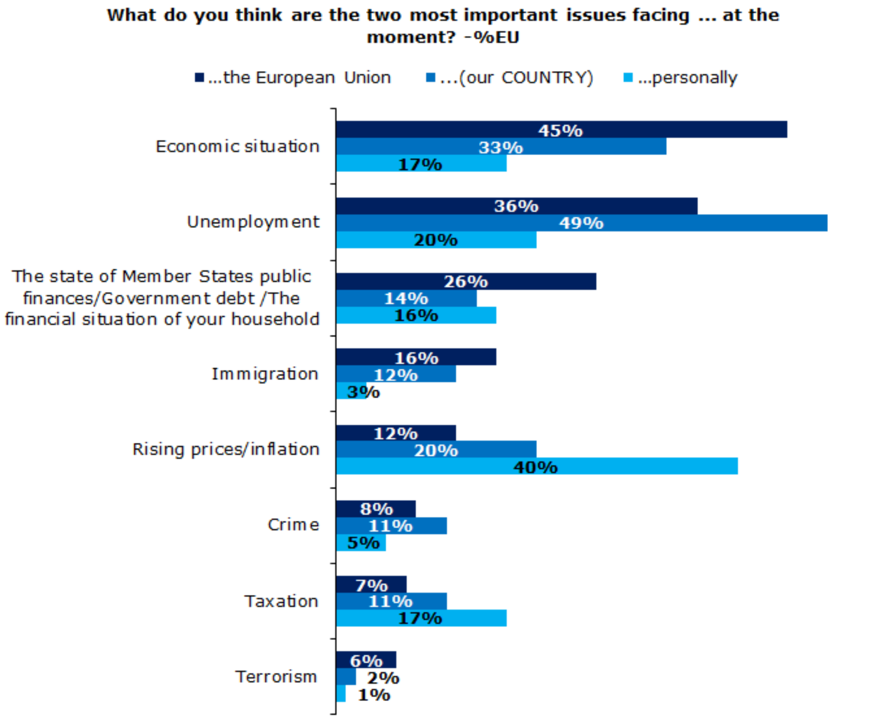
- **At national level, unemployment** is perceived as the most important issue – whether or not respondents are personally affected (49%, -2 percentage points); this issue also obtained a high score at European level (36%, -2), but was less frequently mentioned as a personal concern (20%, -2).

However, at all levels, concerns about unemployment have eased since spring 2013, after continuously increasing over several surveys.

- The **economic situation** as a whole is seen as the most important problem **facing the EU,** but has lost ground over the year (45%, -3 percentage points since spring 2013, and -8 since autumn 2012).

- Lastly, concerns about **immigration** have increased steadily, especially at European level (16%, +6 percentage points since spring 2013, +8 compared with 2012), but also at national level (12%, +2 since spring 2013, +4 since autumn 2012).

- However, across all levels, we found that **Europeans continue to be preoccupied above all by economic and financial issues.** In this context, social and, above all, environmental issues take second place. However, economic issues have lost ground, while social and environmental concerns have grown, albeit hesitantly.



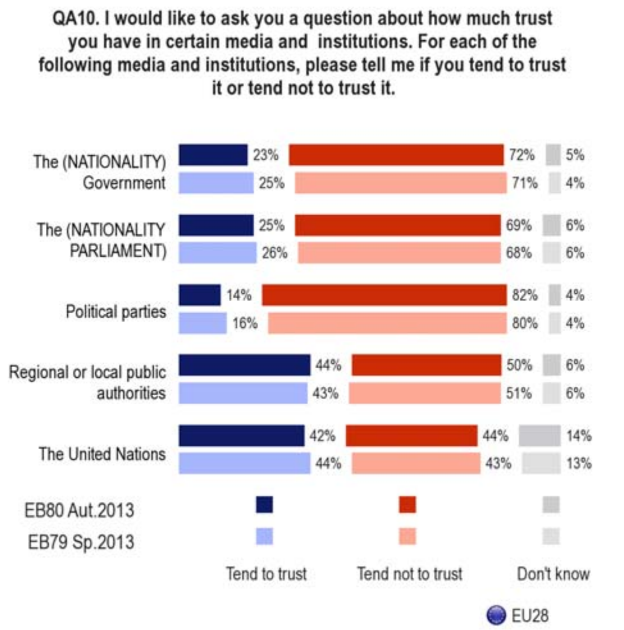
Comparable items mentioned by more than 5% of respondents at EU level

3. POLITICAL ASPECTS

3.1. Trust in institutions

- Europeans still tend not to trust the institutions tested; overall, trust has fallen even further -

Overall, Europeans are increasingly less likely to trust their **national government**: 23% "tend to trust it", -2 percentage points since spring 2013 and -4 since autumn 2012.



Trust in the **national parliament has also decreased slightly** (25%, -1 percentage point) and is now at a record Eurobarometer low.

A majority of respondents trust the government and parliament in five Member States: Sweden, which has the highest scores for both its government (57%, -3 percentage points since spring 2013) and its parliament (70%, =), Luxembourg (51%, -11; 41%, -8), Finland (50%, -4; 58%, -3), Austria (50%, =; 54%, +1) and Malta (48%, -11; 51%, -11). In Denmark, a majority of respondents trust their national parliament (58%, -2), but only a minority trust the government (40%, +4).

Respondents in Spain (9% trust the government, +1 percentage point since spring 2013; 8% trust the parliament, +1) and Slovenia (10%, unchanged; 6%, =) are the least likely to trust their national institutions. Levels of trust have fallen sharply in France (14%, -10 for the government; 19%, -6 for the parliament) and Romania (16%, -10; 11%, -5), as well as in the Netherlands (37%, -7; 41%, -8).

In the candidate countries:

- Only a minority of respondents trust their national institutions. Respondents in Serbia (30%, +3 percentage points for the government; 21%, -2 for the parliament) and the Former Yugoslav Republic of Macedonia, following a decrease in trust (29%, -7; 25%, -6), are the least likely to do so.

- Trust has fallen sharply in Iceland (30%, -17 for the government; 40%, -17 for the parliament) and Turkey (36%, -12 for the government; 38%, -7 for the parliament).

Only 14% of Europeans trust political parties (-2 percentage points since spring 2013) versus 82% (+2) who tend not to trust them. **They do not inspire trust among a majority of respondents anywhere, and distrust far outweighs trust in each of the 28 Member States**. The Member States where respondents are the most likely to trust political parties are Sweden (34%, -9), Austria (34%, -3), Denmark (33%, -3) and Finland (32%, -5), but even in those countries only minorities do so. More than a quarter of respondents also tend to trust political parties in the Netherlands (28%, -6), Malta (27%, -19) – where trust has fallen very sharply since spring 2013 – Belgium (26%, -8) and Luxembourg (26%, -9). Respondents in Greece (4%, unchanged), Spain (6%, +1), Slovenia (6%, +2) and Latvia (6%, -3) are particularly sceptical.

Europeans are more likely to trust regional and local authorities, but the European average is still below 50% (44%, +1 percentage point). These are the only political institutions tested to have recorded an increase, albeit very small. Trust in regional and local authorities varies very significantly from one country to another. **A majority of respondents in 15 Member States tend to trust them (versus 13 in spring 2013)**, with the highest scores in Luxembourg (74%, +6), Denmark (71%, -2) and Austria (71%, +3). In contrast, respondents in Italy (14%, -1) and Croatia (19%, -1) are the least likely to trust them. Trust has increased in 19 Member States, most notably in Portugal (46%, +14).

Lastly, after declining slightly, trust in the **United Nations** (42%, -2 percentage points) is now outweighed by distrust (44%, +1), while 14% of respondents “didn’t know”. Majorities trust the UN in 19 Member States, led by the three Nordic countries: Finland (73%, +5), followed by Denmark (71%, -5) and Sweden (71%, +1). In contrast, respondents in Cyprus (18%, unchanged) and Greece (20%, -1) are the least likely to trust the UN. Trust has gained the most ground in Spain (30%, +8), but is still considerably below the European average. The reverse applies in the Netherlands, where trust has fallen sharply, while remaining above the EU28 average (50%, -15).

Among the **candidate countries**, Iceland stands out by the high proportion of respondents who trust the UN (79%, -2 percentage points) and regional and local public authorities (64%, -11), despite a significant decrease. A majority of respondents in the Former Yugoslav Republic of Macedonia also trust the UN, albeit to a lesser extent, and despite a significant decrease (48%, -9, versus 36%, +3). Trust in the UN has also deteriorated sharply in Montenegro and is now outweighed by distrust (26%, -17, versus 58%, +16).

QA10. I would like to ask you a question about how much trust you have in certain media and institutions. For each of the following media and institutions, please tell me if you tend to trust it or tend not to trust it.

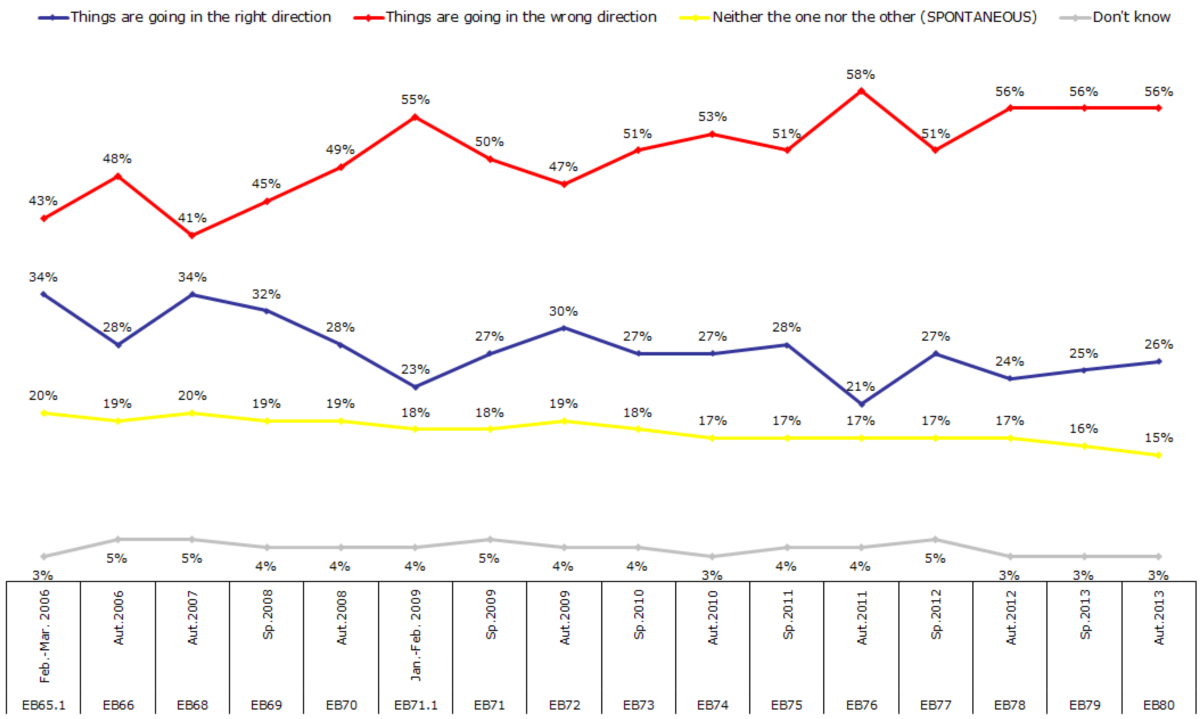
	Regional or local public authorities	Diff. Aut.2013 - Sp.2013	The United Nations	Diff. Aut.2013 - Sp.2013	The (NATIONALITY PARLIAMENT)	Diff. Aut.2013 - Sp.2013	The (NATIONALITY) Government	Diff. Aut.2013 - Sp.2013	Political parties	Diff. Aut.2013 - Sp.2013
EU28	44%	+1	42%	-2	25%	-1	23%	-2	14%	-2
BE	65%	+6	55%	-2	48%	=	48%	+2	26%	-8
BG	33%	+2	49%	+2	14%	+1	20%	+4	12%	-3
CZ	47%	+4	50%	-1	12%	+1	16%	+3	11%	+1
DK	71%	-2	71%	-5	58%	-2	40%	+4	33%	-3
DE	65%	=	39%	-5	44%	-3	38%	-6	21%	-4
EE	57%	+4	56%	+4	35%	+5	38%	+2	16%	-1
IE	35%	+3	48%	+5	18%	=	17%	-1	11%	-2
EL	23%	+2	20%	-1	12%	+2	10%	+1	4%	=
ES	22%	+3	30%	+8	8%	+1	9%	+1	6%	+1
FR	52%	-3	42%	-4	19%	-6	14%	-10	7%	-4
HR	19%	-1	39%	-4	12%	-4	16%	-3	8%	-1
IT	14%	-1	27%	-4	10%	-2	10%	-1	7%	=
CY	35%	+3	18%	=	18%	-2	26%	+1	7%	-3
LV	48%	+6	43%	+3	17%	+2	21%	+1	6%	-3
LT	34%	+1	47%	-1	11%	-2	20%	-7	9%	-5
LU	74%	+6	48%	-3	41%	-8	51%	-11	26%	-9
HU	57%	+5	52%	+1	34%	+5	37%	+6	23%	+3
MT	56%	+3	56%	+2	51%	-11	48%	-11	27%	-19
AT	71%	+3	56%	=	54%	+1	50%	=	34%	-3
NL	59%	+3	50%	-15	41%	-8	37%	-7	28%	-6
PL	47%	+9	49%	-1	17%	+4	19%	+5	14%	+4
PT	46%	+14	37%	+1	15%	+2	15%	+5	12%	+3
RO	37%	=	43%	+1	11%	-5	16%	-10	8%	-5
SI	29%	+5	33%	=	6%	=	10%	=	6%	+2
SK	44%	+2	52%	+2	28%	=	29%	+1	16%	-1
FI	65%	=	73%	+5	58%	-3	50%	-4	32%	-5
SE	61%	=	71%	+1	70%	=	57%	-3	34%	-9
UK	48%	-1	48%	-1	24%	-1	24%	+2	11%	-2
MK	31%	-6	48%	-9	25%	-6	29%	-7	18%	-7
IS	64%	-11	79%	-2	40%	-17	30%	-17	21%	-13
ME	21%	-4	26%	-17	32%	=	30%	-4	19%	-3
RS	18%	=	31%	=	21%	-2	30%	+3	11%	-3
TR	28%	-7	20%	-6	38%	-7	36%	-12	20%	-7

3.2. The direction in which things are going

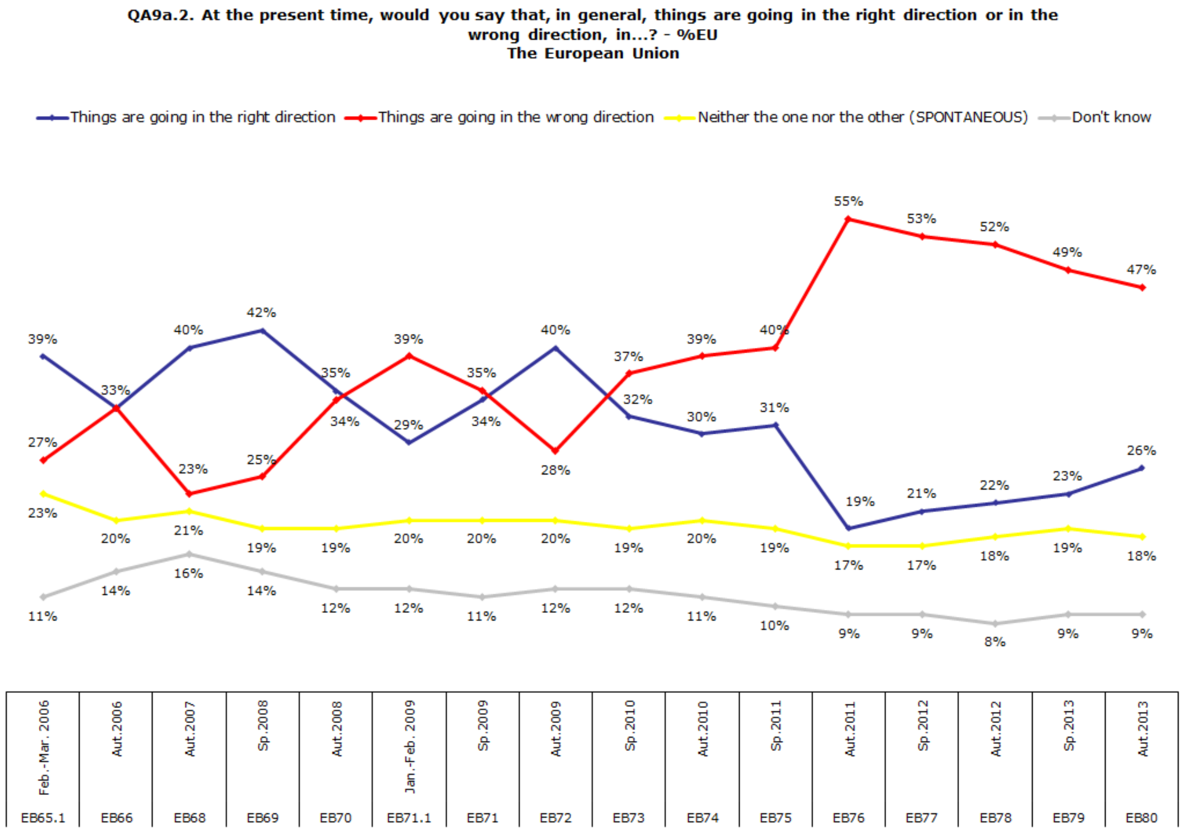
- A continuing pattern: results are stable at national level, but have improved at European level –

For 26% of Europeans things are "going in the right direction", a rise of +1 percentage point; 15% answered *spontaneously* "neither the one nor the other" (-1). The impression that things are "going in the wrong direction" at national level is stable and continues to be shared by an absolute majority of Europeans (56%, unchanged since spring 2013 and autumn 2012). The score has not fallen below 50% since the Eurobarometer survey of autumn 2009 (EB72) when it was 47%.

QA9a.1. At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in...? - %EU (OUR COUNTRY)



Approval of the direction taken by the European Union has increased steadily since the autumn 2011 survey (EB76), a point at which the belief that things were going in "the right direction" had plummeted (19%, -12 percentage points). In the autumn 2013 survey, the proportion of Europeans who believe that things are "going in the right direction" has gained significant ground (26%, +3 since spring 2013, and +7 since autumn 2011). Simultaneously, the proportion saying that things are "going in the wrong direction" has fallen once again (47%, -2), and 8-point fall since autumn 2011 (when the score was 55%). Lastly, 18% of respondents answered "neither the one nor the other" (-1), slightly higher than for the national level. The "DK" rate is 9% (unchanged).



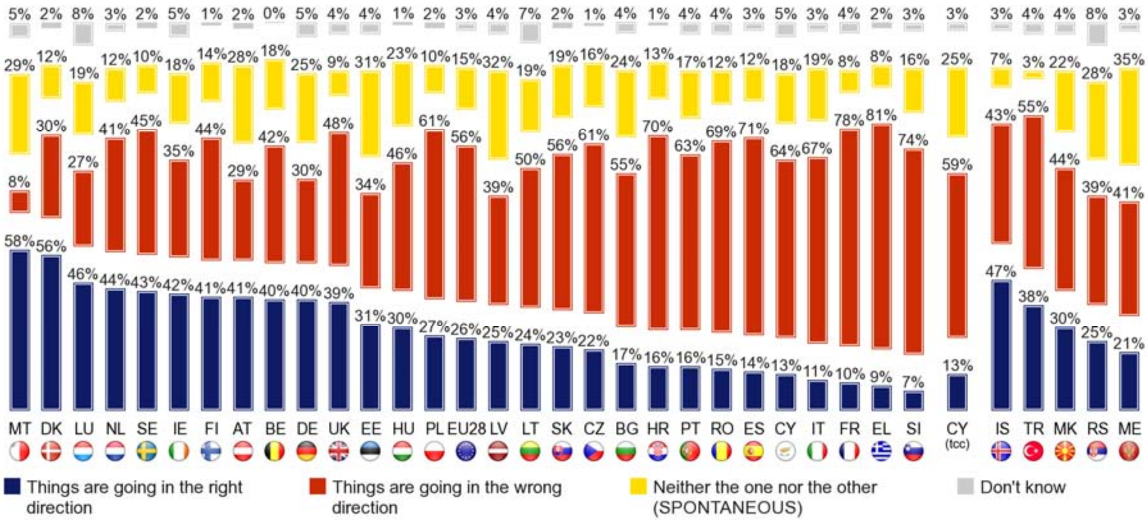
There are only moderate differences between the views of euro area and non-euro area respondents on **the way things are going in their country**: 23% of people in the euro area think that things "are going in the right direction" , while 56% answer "in the wrong direction", compared with 31% versus 54% among non-euro area respondents. Differences are far more pronounced in the case of the **direction taken by the EU,** since euro area respondents are far more critical: 22% think that things are "going in the right direction" while 51% answered "in the wrong direction", compared with 33% versus 39% in the non-euro area countries.

There are significant differences between Member States as regards the **direction taken at national level** (the answer "in the right direction" score between 7% and 58%). Malta (58%, +1 percentage point) and Denmark (56%, +9) are the only two countries where an absolute majority of respondents think that things are "going in the right direction". This view is shared by a relative majority in five other Member States: Luxembourg (46%, +3), the Netherlands (44%, +1), Ireland (42%, +12), Austria (41%, unchanged) and Germany (40%, =). In contrast, a majority of respondents think that things are "going in the wrong direction" in 21 countries, led by Greece (81%, +1), France (78%, +8), Slovenia (74%, -1), Spain (71%, -6) and Croatia (70%, +3).

Respondents in Ireland are now more optimistic about the way things are going in their country (42%, +12 for "things are going in the right direction"). There has also been an upturn in optimism in Denmark, as noted above (56%, +9), and in Hungary (30%, +9).

QA9a.1. At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in…?

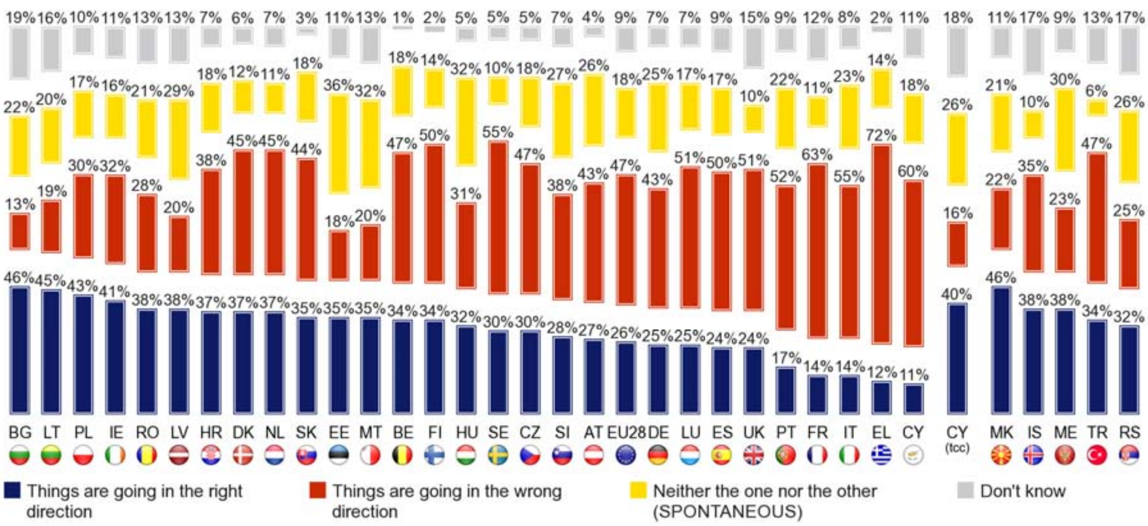
(OUR COUNTRY)



There are significant differences between countries, although they are slightly less pronounced than for the national level, in assessments of the **direction taken by the European Union:** the proportion of respondents who think that the EU is going "in the right direction" varies from 11% to 46%. A majority of respondents in nine Member States say that things are "going in the right direction" in the EU, most notably in Bulgaria (46%, +2 percentage points), Lithuania (45%, -3), Poland (43%, +4) and Ireland (41%, +13), confirming the renewed sense of optimism in this last country. Respondents in nineteen countries are predominantly negative about the direction taken by the European Union, led by Greece (72%, +1), France (63%, +4) and Cyprus (60%, -2). In addition to Ireland, **perceptions of the direction taken by the European Union have improved sharply** in Slovenia (28%, +9) and Spain (24%, +8).

QA9a.2. At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in…?

The European Union



In the candidate countries:

- Respondents in the Former Yugoslav Republic of Macedonia, Montenegro, Turkey and Serbia are predominantly negative about the **direction taken by their country**. However, a majority of respondents in Iceland are still positive, despite a very sharp fall in optimism since spring 2013 (47%, -24 percentage points for “things are going in the right direction”).
- **Conversely, a majority of respondents are positive about the direction taken by the European Union in four countries**: the Former Yugoslav Republic of Macedonia, Iceland, Montenegro and Serbia. Turkey is the only country where a majority think that things are “going in the wrong direction” (47%, +1).

QA9a. At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in…?

	(OUR COUNTRY)						The European Union					
	Things are going in the right direction	Diff. Aut.2013-Sp.2013	Things are going in the wrong direction	Diff. Aut.2013-Sp.2013	Neither the one nor the other (SP.)	Diff. Aut.2013-Sp.2013	Things are going in the right direction	Diff. Aut.2013-Sp.2013	Things are going in the wrong direction	Diff. Aut.2013-Sp.2013	Neither the one nor the other (SP.)	Diff. Aut.2013-Sp.2013
EU28	26%	+1	56%	=	15%	-1	26%	+3	47%	-2	18%	-1
BE	40%	+5	42%	-1	18%	-3	34%	+2	47%	-3	18%	+2
BG	17%	-1	55%	+4	24%	-2	46%	+2	13%	=	22%	+1
CZ	22%	+5	61%	-5	16%	=	30%	+3	47%	-2	18%	-1
DK	56%	+9	30%	-13	12%	+3	37%	+2	45%	-6	12%	+2
DE	40%	=	30%	=	25%	-1	25%	+2	43%	-2	25%	=
EE	31%	+2	34%	-3	31%	=	35%	+2	18%	-6	36%	+3
IE	42%	+12	35%	-10	18%	-2	41%	+13	32%	-9	16%	-4
EL	9%	=	81%	+1	8%	-2	12%	-1	72%	+1	14%	=
ES	14%	+4	71%	-6	12%	+1	24%	+8	50%	-7	17%	-1
FR	10%	-6	78%	+8	8%	-2	14%	-2	63%	+4	11%	-1
HR	16%	-3	70%	+3	13%	+1	37%	+4	38%	=	18%	-5
IT	11%	-2	67%	+7	19%	-4	14%	-1	55%	+9	23%	-8
CY	13%	-2	64%	+5	18%	-1	11%	-1	60%	-2	18%	+1
LV	25%	-4	39%	+2	32%	+2	38%	+2	20%	+1	29%	-1
LT	24%	-9	50%	+8	19%	+1	45%	-3	19%	-1	20%	+4
LU	46%	+3	27%	-12	19%	+4	25%	-1	51%	-10	17%	+6
HU	30%	+9	46%	-8	23%	=	32%	+4	31%	-2	32%	+1
MT	58%	+1	8%	+2	29%	+1	35%	+6	20%	-2	32%	=
AT	41%	=	29%	+4	28%	-5	27%	+2	43%	-1	26%	-1
NL	44%	+1	41%	-5	12%	+3	37%	+5	45%	-11	11%	+4
PL	27%	+7	61%	-10	10%	+3	43%	+4	30%	-10	17%	+2
PT	16%	+7	63%	-10	17%	+3	17%	+4	52%	-5	22%	+2
RO	15%	-4	69%	+10	12%	-4	38%	+4	28%	+3	21%	-1
SI	7%	=	74%	-1	16%	+1	28%	+9	38%	-10	27%	+1
SK	23%	+2	56%	-2	19%	+2	35%	+6	44%	-5	18%	+2
FI	41%	-4	44%	+4	14%	-1	34%	+2	50%	-5	14%	+4
SE	43%	-6	45%	+3	10%	+3	30%	+2	55%	-5	10%	+3
UK	39%	+4	48%	-4	9%	-1	24%	+4	51%	-6	10%	=
CY (tcc)	13%	+7	59%	-13	25%	+6	40%	+13	16%	-9	26%	-16
MK	30%	-3	44%	+1	22%	+1	46%	-6	22%	+5	21%	=
IS	47%	-24	43%	+21	7%	+3	38%	+2	35%	-8	10%	+6
ME	21%	-8	41%	-4	35%	+16	38%	-5	23%	-1	30%	+9
RS	25%	-1	39%	+2	28%	-1	32%	-2	25%	+4	26%	-2
TR	38%	-9	55%	+10	3%	+2	34%	-1	47%	+1	6%	+2

A socio-demographic analysis reveals that managers (36%), people who studied up to the age of 20 or beyond (31%) and those who place themselves at the top of the social scale (36%) are the most positive about **the direction taken by their country**. However, age is not really a discriminating factor. Unemployed people (69%), housepersons (64%), those who left school at the age of 15 or earlier (62%) and those who position themselves at the bottom of the social scale (68%) are the most negative.

An almost identical pattern emerges in the case of the **direction taken by the European Union,** but with smaller differences between the categories: 33% of managers and 34% of those who position themselves at the top of the social scale are the most optimistic and think that things are "going in the right direction", whereas unemployed people (21%) and those who position themselves at the bottom of the social scale (19%) are more pessimistic. However, in contrast to the trends noted in the case of the national level, age is a discriminating factor: young people aged 15 to 24 (32%) and above all students (35%) are more optimistic than older respondents (22% in the 55+ age group and retired people).

QA9a. At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in...?

	(OUR COUNTRY)				The European Union			
	Things are going in the right direction	Things are going in the wrong direction	Neither the one nor the other (SP.)	Don't know	Things are going in the right direction	Things are going in the wrong direction	Neither the one nor the other (SP.)	Don't know
EU28	26%	56%	15%	3%	26%	47%	18%	9%
Gender								
Man	28%	55%	15%	2%	28%	48%	18%	6%
Woman	23%	57%	16%	4%	24%	46%	18%	12%
Age								
15-24	26%	54%	15%	5%	32%	40%	18%	10%
25-39	27%	56%	14%	3%	29%	45%	18%	8%
40-54	24%	57%	16%	3%	25%	49%	18%	8%
55 +	25%	56%	15%	4%	22%	49%	18%	11%
Education (End of)								
15-	19%	62%	15%	4%	18%	52%	19%	11%
16-19	24%	57%	16%	3%	25%	48%	18%	9%
20+	31%	51%	15%	3%	30%	45%	18%	7%
Still studying	29%	50%	17%	4%	35%	38%	18%	9%
Socio-professional category								
Self-employed	30%	53%	15%	2%	27%	47%	19%	7%
Managers	36%	46%	15%	3%	33%	45%	16%	6%
Other white collars	27%	53%	17%	3%	29%	44%	20%	7%
Manual workers	24%	57%	16%	3%	25%	48%	19%	8%
House persons	19%	64%	12%	5%	20%	52%	17%	11%
Unemployed	15%	69%	13%	3%	21%	53%	16%	10%
Retired	26%	55%	15%	4%	22%	48%	18%	12%
Students	29%	50%	17%	4%	35%	38%	18%	9%
Self-positioning on the social staircase								
Low (1-4)	15%	68%	14%	3%	19%	52%	18%	11%
Medium (5-6)	26%	55%	16%	3%	25%	47%	19%	9%
High (7-10)	36%	47%	15%	2%	34%	42%	17%	7%

The following tables show the results by socio-demographic criteria in the whole of the European Union (EU28) on average, in the six largest EU countries and in four countries which have been particularly badly affected by the economic crisis.

QA9a.1. At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in (OUR COUNTRY)?

Things are going in the right direction

	EU28	DE	ES	FR	IT	PL	UK	EL	PT	IE	CY
	26%	40%	14%	10%	11%	27%	39%	9%	16%	42%	13%
Gender											
Male	28%	42%	17%	12%	11%	27%	47%	11%	18%	44%	16%
Female	23%	37%	10%	8%	11%	28%	32%	8%	15%	40%	9%
Age											
15-24	26%	36%	8%	13%	9%	33%	40%	12%	24%	30%	12%
25-39	27%	49%	13%	11%	8%	32%	42%	6%	15%	44%	13%
40-54	24%	35%	15%	8%	10%	28%	35%	10%	17%	43%	11%
55 +	25%	39%	15%	9%	13%	21%	41%	10%	14%	45%	14%
Education (End of)											
15-	19%	36%	14%	7%	12%	16%	29%	7%	13%	39%	5%
16-19	24%	40%	13%	7%	8%	22%	39%	9%	20%	38%	12%
20+	31%	42%	15%	14%	15%	36%	46%	11%	22%	49%	17%
Still studying	29%	39%	8%	15%	9%	33%	47%	10%	22%	40%	15%
Socio-professional category											
Self-employed	30%	52%	17%	11%	11%	38%	51%	14%	23%	49%	9%
Managers	36%	39%	14%	17%	16%	42%	46%	4%	21%	52%	14%
Other white collars	27%	37%	15%	10%	13%	35%	40%	8%	20%	40%	15%
Manual workers	24%	40%	14%	8%	8%	28%	38%	2%	18%	41%	11%
House persons	19%	41%	14%	0%	5%	21%	31%	7%	9%	39%	6%
Unemployed	15%	21%	11%	6%	6%	15%	26%	8%	13%	30%	9%
Retired	26%	41%	17%	11%	15%	20%	37%	12%	13%	49%	20%
Students	29%	39%	8%	15%	9%	33%	47%	10%	22%	40%	15%

QA9a.1. At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in (OUR COUNTRY)?

Things are going in the wrong direction

	EU28	DE	ES	FR	IT	PL	UK	EL	PT	IE	CY
	56%	30%	71%	78%	67%	61%	48%	81%	63%	35%	64%
Gender											
Male	55%	31%	70%	76%	67%	63%	42%	79%	63%	36%	62%
Female	57%	29%	72%	80%	66%	58%	54%	83%	62%	35%	66%
Age											
15-24	54%	30%	74%	75%	67%	52%	48%	74%	51%	36%	65%
25-39	56%	24%	71%	75%	70%	58%	47%	85%	64%	35%	64%
40-54	57%	35%	67%	81%	65%	62%	50%	82%	62%	36%	64%
55 +	56%	30%	73%	79%	65%	67%	47%	82%	66%	36%	63%
Education (End of)											
15-	62%	31%	74%	82%	67%	77%	58%	88%	67%	46%	77%
16-19	57%	32%	72%	83%	68%	65%	49%	81%	60%	40%	65%
20+	51%	28%	67%	73%	63%	54%	40%	77%	57%	25%	56%
Still studying	50%	26%	71%	69%	67%	49%	42%	80%	53%	35%	60%
Socio-professional category											
Self-employed	53%	32%	72%	83%	66%	49%	30%	81%	55%	23%	67%
Managers	46%	32%	57%	68%	59%	52%	47%	91%	57%	28%	61%
Other white collars	53%	27%	77%	80%	57%	53%	46%	77%	53%	37%	54%
Manual workers	57%	30%	68%	79%	71%	62%	50%	83%	63%	36%	67%
House persons	64%	38%	65%	96%	75%	69%	51%	86%	77%	40%	61%
Unemployed	69%	44%	74%	86%	77%	72%	60%	84%	69%	45%	74%
Retired	55%	27%	73%	77%	63%	68%	51%	78%	64%	34%	60%
Students	50%	26%	71%	69%	67%	49%	42%	80%	53%	35%	60%

QA9a.2. At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in the European Union…?

Things are going in the right direction

	EU28	DE	ES	FR	IT	PL	UK	EL	PT	IE	CY
	26%	25%	24%	14%	14%	43%	24%	12%	17%	41%	11%
Gender											
Male	28%	27%	28%	17%	15%	44%	27%	14%	19%	44%	13%
Female	24%	23%	20%	12%	14%	42%	21%	9%	15%	38%	9%
Age											
15-24	32%	26%	23%	24%	14%	51%	33%	19%	24%	32%	11%
25-39	29%	29%	29%	14%	14%	47%	26%	9%	18%	42%	11%
40-54	25%	26%	27%	11%	16%	45%	21%	13%	19%	43%	9%
55 +	22%	22%	18%	13%	14%	33%	20%	9%	13%	43%	13%
Education (End of)											
15-	18%	22%	20%	9%	12%	28%	13%	7%	14%	29%	8%
16-19	25%	24%	24%	10%	15%	37%	22%	11%	22%	38%	9%
20+	30%	25%	32%	17%	19%	51%	32%	13%	21%	50%	12%
Still studying	35%	34%	23%	31%	16%	55%	39%	19%	20%	39%	17%
Socio-professional category											
Self-employed	27%	35%	31%	16%	14%	44%	22%	18%	22%	51%	3%
Managers	33%	28%	29%	19%	26%	52%	31%	9%	31%	50%	7%
Other white collars	29%	21%	36%	10%	21%	52%	32%	9%	21%	41%	14%
Manual workers	25%	25%	27%	11%	11%	43%	20%	7%	20%	39%	11%
House persons	20%	26%	17%	2%	10%	39%	18%	6%	7%	40%	8%
Unemployed	21%	11%	21%	14%	8%	37%	21%	9%	13%	29%	7%
Retired	22%	22%	22%	14%	16%	33%	18%	12%	13%	44%	15%
Students	35%	34%	23%	31%	16%	55%	39%	19%	20%	39%	17%

QA9a.2. At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in the European Union…?

Things are going in the wrong direction

	EU28	DE	ES	FR	IT	PL	UK	EL	PT	IE	CY
	47%	43%	50%	63%	55%	30%	51%	72%	52%	32%	60%
Gender											
Male	48%	46%	51%	63%	57%	30%	53%	69%	54%	33%	60%
Female	46%	39%	50%	62%	53%	30%	48%	74%	51%	30%	60%
Age											
15-24	40%	34%	50%	47%	53%	29%	44%	58%	44%	41%	59%
25-39	45%	36%	49%	61%	57%	30%	52%	76%	51%	30%	60%
40-54	49%	46%	48%	72%	53%	31%	53%	72%	53%	29%	62%
55 +	49%	46%	53%	64%	55%	32%	52%	75%	55%	31%	59%
Education (End of)											
15-	52%	45%	53%	69%	56%	35%	56%	79%	54%	40%	65%
16-19	48%	43%	52%	72%	53%	31%	53%	72%	51%	35%	60%
20+	45%	45%	48%	56%	54%	29%	46%	70%	46%	22%	58%
Still studying	38%	32%	51%	33%	55%	27%	40%	55%	48%	40%	57%
Socio-professional category											
Self-employed	47%	46%	51%	65%	52%	33%	50%	71%	55%	25%	60%
Managers	45%	45%	41%	56%	50%	35%	52%	71%	49%	29%	68%
Other white collars	44%	36%	45%	67%	48%	25%	46%	71%	44%	31%	45%
Manual workers	48%	44%	48%	67%	55%	31%	53%	74%	50%	31%	67%
House persons	52%	52%	48%	88%	59%	36%	45%	76%	70%	29%	61%
Unemployed	53%	47%	55%	67%	68%	35%	54%	79%	54%	40%	67%
Retired	48%	43%	51%	62%	55%	29%	53%	71%	53%	26%	58%
Students	38%	32%	51%	33%	55%	27%	40%	55%	48%	40%	57%

II. THE EUROPEAN UNION AND ITS CITIZENS

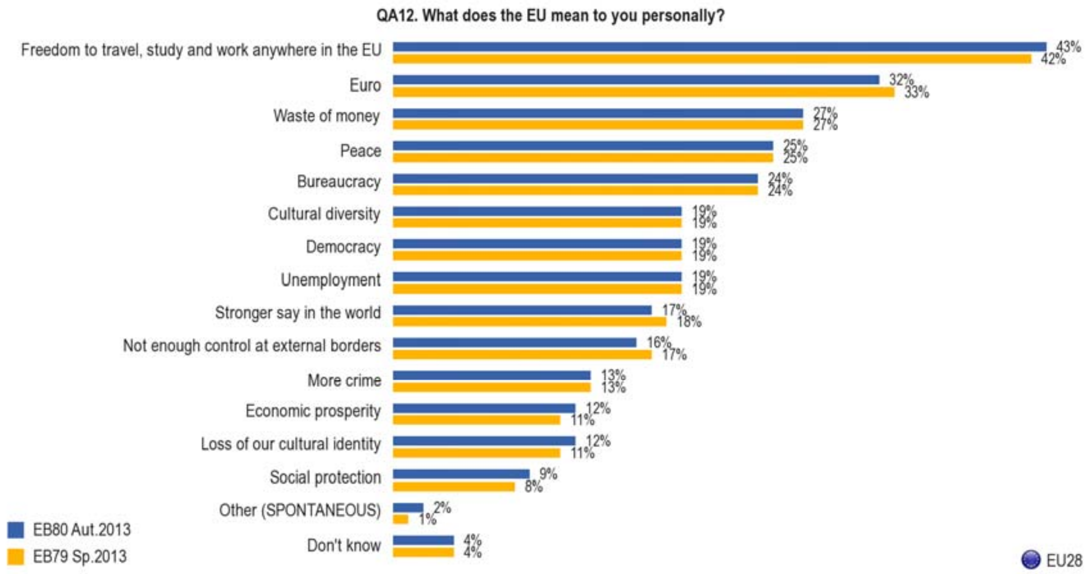
1. ATTACHMENT TO THE EUROPEAN UNION

1.1. What does the European Union stand for?

- Freedom remains the main representation associated with the EU -

With a score of 43% (+1 percentage point since spring 2013), "the freedom to travel, study and work anywhere in the EU" remains by far the most frequently-mentioned representation associated with the European Union, as in every previous Standard Eurobarometer survey. The euro as a symbol embodying the EU is ranked in second place, with a score of 32% (-1), ahead of "waste of money" (27%, unchanged), "peace" (25%, =) and "bureaucracy" (24%, =).

Each of the other representations was mentioned by fewer than 20% of respondents. The order is similar to that of the spring 2013 survey (EB79), without any significant changes. The stability of this indicator over time reflects the extent to which the fundamental representations associated with the EU are deeply rooted in European public opinion[8].



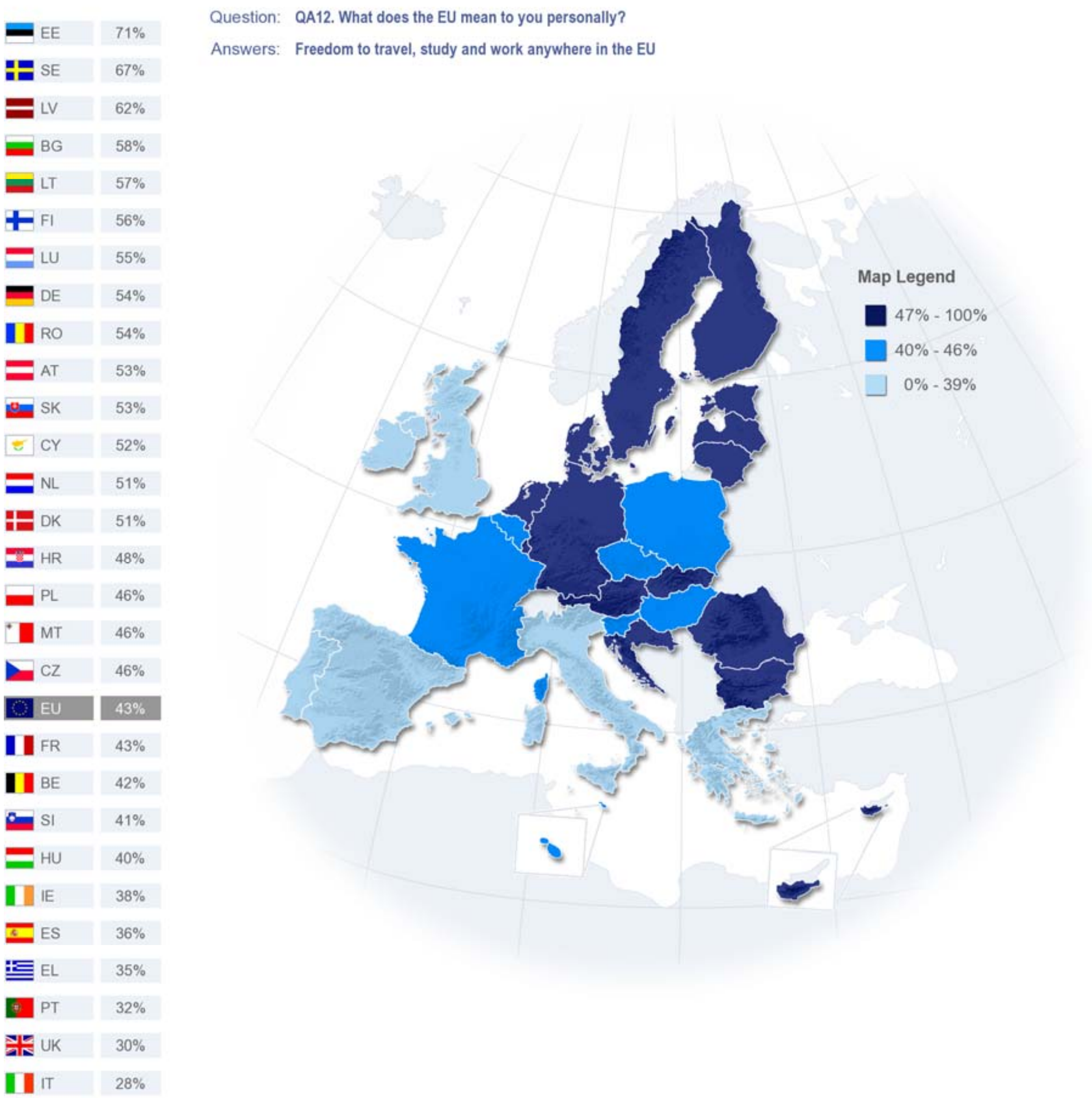
Multiple answers possible

The freedom to travel, study and work anywhere in the EU (41% and 42% respectively), the euro (35% and 41% respectively) and waste of money (30% and 31% respectively) are the three predominant representations in the euro area countries.

[8] QA12. What does the EU means to you personally? Multiple answers possible

In the non-euro area countries, freedom (43%), bureaucracy (22%) and peace (21%) are the top three representations. Non-euro area respondents are far less likely to mention the euro (18%, in sixth place). Interestingly, euro area respondents are far more likely (22%) than non-euro area respondents (13%) to associate the European Union with unemployment.

Freedom of movement within the European Union tops the list of representations in 22 Member States, led by the Baltic States (71% in Estonia, +8 percentage points; 62% in Latvia, +5; and 57% in Lithuania, -4), Sweden (67%, +2), Bulgaria (58%, +1) and Finland (56%, unchanged). Since spring 2013, the proportion of respondents who associate the EU with freedom of movement has increased significantly, as we have seen, in Estonia (+8), but also in Cyprus (+8) and Belgium (+6). However, it has fallen sharply in Slovenia (-9).



The euro tops the list in four Member States: Austria (65%, +2 percentage points), Belgium (51%, unchanged), Greece (46%, =) and Italy (36%, +1), all euro area members. The proportion of respondents mentioning the euro as a symbol of the EU has increased significantly in Malta (+10), Poland (+6) and Latvia (+6), which will join the euro area in January 2014. In contrast, it has fallen sharply in Spain (-9).

Unemployment tops the list of representations associated with the EU in Cyprus (63%, +1 percentage point since the spring 2013 survey (EB79), ahead of freedom of movement (52%, +8) and the euro (35%, +2), and in Portugal (33%, unchanged, just ahead of the euro (32%, =) and freedom of movement (32%, =). Respondents in Greece (45%, +1) and Austria (45%, +3) are also far more likely than the European average to associate the EU with unemployment.

Lastly, as in previous Standard Eurobarometer surveys, respondents in Germany and Austria stand out as being among the most likely to associate the EU with **waste of money** (42% and 55% respectively) and **bureaucracy** (40% and 50% respectively). Bureaucracy was also mentioned frequently in Sweden (43%).

QA12. What does the EU mean to you personally?

	Freedom to travel, study and work anywhere in the EU	Euro	Waste of money	Peace	Bureaucracy	Cultural diversity	Democracy	Unemployment	Stronger say in the world	Not enough control at external borders	More crime	Economic prosperity	Loss of our cultural identity	Social protection	Other (SPONT.)	Don't know
EU28	43%	32%	27%	25%	24%	19%	19%	19%	17%	16%	13%	12%	12%	9%	2%	4%
BE	42%	51%	32%	28%	21%	22%	23%	18%	20%	20%	20%	16%	10%	12%	1%	1%
BG	58%	12%	8%	25%	10%	20%	28%	10%	11%	8%	5%	24%	6%	18%	0%	3%
CZ	46%	20%	36%	22%	35%	14%	17%	22%	17%	17%	20%	10%	15%	7%	1%	2%
DK	51%	17%	18%	44%	37%	23%	28%	13%	25%	36%	22%	14%	13%	13%	1%	2%
DE	54%	46%	42%	45%	40%	29%	26%	19%	20%	22%	26%	11%	11%	8%	0%	1%
EE	71%	31%	16%	17%	21%	19%	11%	9%	12%	7%	5%	8%	11%	8%	2%	4%
IE	38%	28%	13%	10%	17%	10%	14%	17%	18%	6%	4%	17%	14%	8%	2%	3%
EL	35%	46%	20%	22%	12%	18%	12%	45%	16%	20%	22%	6%	24%	10%	2%	1%
ES	36%	31%	23%	11%	22%	14%	15%	19%	12%	8%	2%	11%	7%	7%	2%	4%
FR	43%	39%	36%	33%	22%	27%	15%	21%	21%	26%	7%	8%	15%	8%	0%	1%
HR	48%	11%	13%	20%	14%	14%	20%	9%	15%	8%	10%	23%	12%	10%	2%	5%
IT	28%	36%	21%	10%	10%	11%	15%	23%	13%	11%	9%	10%	11%	7%	2%	4%
CY	52%	35%	25%	24%	16%	27%	14%	63%	12%	28%	41%	6%	36%	14%	1%	1%
LV	62%	20%	15%	15%	16%	11%	9%	11%	7%	4%	4%	12%	11%	8%	1%	6%
LT	57%	13%	15%	19%	14%	19%	19%	7%	15%	5%	6%	18%	10%	10%	2%	6%
LU	55%	43%	26%	39%	17%	25%	25%	14%	20%	17%	14%	11%	7%	14%	1%	0%
HU	40%	13%	10%	18%	12%	18%	20%	19%	16%	8%	13%	14%	5%	9%	2%	4%
MT	46%	33%	13%	26%	15%	20%	28%	10%	29%	11%	5%	20%	8%	13%	2%	3%
AT	53%	65%	55%	40%	50%	29%	28%	45%	27%	39%	51%	17%	27%	19%	3%	0%
NL	51%	46%	25%	32%	35%	21%	18%	17%	28%	17%	16%	23%	17%	7%	2%	1%
PL	46%	23%	11%	15%	18%	11%	19%	9%	17%	3%	5%	12%	7%	9%	1%	8%
PT	32%	32%	21%	8%	6%	13%	7%	33%	11%	11%	14%	8%	16%	5%	3%	7%
RO	54%	28%	14%	32%	13%	15%	37%	13%	12%	7%	9%	25%	10%	18%	1%	4%
SI	41%	33%	29%	25%	30%	14%	13%	30%	14%	9%	23%	10%	14%	6%	3%	2%
SK	53%	53%	33%	18%	24%	16%	13%	28%	22%	15%	22%	7%	11%	6%	1%	1%
FI	56%	48%	34%	31%	39%	21%	12%	9%	14%	10%	16%	9%	7%	10%	1%	1%
SE	67%	20%	37%	44%	43%	29%	28%	13%	32%	17%	16%	11%	7%	9%	1%	1%
UK	30%	13%	28%	16%	25%	15%	10%	13%	12%	23%	9%	11%	18%	8%	3%	11%

1st MOST FREQUENTLY MENTIONED ITEM
2nd MOST FREQUENTLY MENTIONED ITEM
3rd MOST FREQUENTLY MENTIONED ITEM

A socio-demographic analysis reveals that the younger generations, those who studied the longest and the most advantaged respondents are more likely to mention the positive representations, while the older respondents and those who studied the least are more likely to focus on the negative representations. By way of example, **freedom to travel, study and work anywhere in the EU** was mentioned by 57% of students, 53% of those who studied up to the age of 20 or beyond and 51% of 15-24 year-olds, compared with 36% of those in the 55-plus age group and 29% of those who left school at 15 or an earlier age.

On the other hand, **waste of money** was mentioned by 33% of those who left school at the age of 15 or earlier and 32% of those in the 55-plus age group, compared with 24% of those who studied the longest and 17% of 15-24 year-olds.

1.2. Support for membership and the perceived benefits of membership (candidate countries)

- With the striking exception of Iceland, support for European Union membership has fallen sharply in the candidate countries -

Support for European Union membership has declined in four of the five candidate countries: the Former Yugoslav Republic of Macedonia, Montenegro, Turkey and Serbia. However, it has increased in Iceland, where previously only a minority of respondents were pro-European[9].

QA7a. Generally speaking, do you think that (OUR COUNTRY)'s membership of the EU would be...?

	A good thing		A bad thing		Neither good nor bad	
	EB80 Aut. 2013	Diff. Aut. 2013- Sp. 2013	EB80 Aut. 2013	Diff. Aut. 2013- Sp. 2013	EB80 Aut. 2013	Diff. Aut. 2013- Sp. 2013
CY (tcc)*	55%	-4	11%	+2	25%	-3
MK	50%	-6	18%	+2	28%	+3
ME	44%	-11	17%	=	33%	+10
TR	38%	=	37%	+6	17%	-4
RS	36%	-3	25%	+4	32%	+1
IS	33%	+9	33%	-9	29%	=

** CY(tcc): Generally speaking, do you think that for the Turkish Cypriot Community the full application of EU legislation would be...?*

The belief that their country would benefit from European Union membership has lost ground in the four countries where support for membership has fallen. In contrast, the belief that EU membership would be a benefit has increased considerably in Iceland (+7)[10].

QA8a. Taking everything into account, would you say that (OUR COUNTRY) would benefit or not from being a member of the EU?

	Would benefit		Would not benefit		Don't know	
	EB80 Aut. 2013	Diff. Aut. 2013 - Sp. 2013	EB80 Aut. 2013	Diff. Aut. 2013 - Sp. 2013	EB80 Aut. 2013	Diff. Aut. 2013 - Sp. 2013
CY (tcc)*	66%	-2	16%	-4	18%	+6
MK	60%	-4	29%	+4	11%	=
ME	54%	-7	30%	+5	16%	+2
TR	43%	-5	45%	+8	12%	-3
RS	42%	-4	34%	+5	24%	-1
IS	40%	+7	48%	-9	12%	+2

**CY(tcc) Taking everything into consideration, would you say that the Turkish Cypriot Community would benefit or not from the full application of the EU legislation?*

[9] QA7a. Generally speaking, do you think that (OUR COUNTRY)'s membership of the EU would be a good thing, a bad thing, neither good nor bad?
[10] QA10a. Taking everything into consideration, would you say that (OUR COUNTRY) would benefit or not from being a member of the EU?

In detail:

Although support for European membership has fallen, it is still supported by a clear majority of respondents in the Former Yugoslav Republic of Macedonia: 50% of respondents there (-6 percentage points since spring 2013) are in favour of EU membership, versus 18% (+2) who see it as “a bad thing” and 28% (+3) who think that it would be “neither good nor bad”. Six out of ten respondents (60%, -4) think that their country would benefit from joining the EU.

Although respondents in Montenegro are predominantly in favour of EU membership, support has fallen significantly and membership is no longer supported by an absolute majority: 44% (-11 percentage points since spring 2013) consider that EU membership would be a good thing, while 17% (unchanged) think that it would be a bad thing and 33% (+10) consider that it would be “neither good nor bad”. A majority of respondents in Montenegro continue to believe that their country would benefit from joining the EU, but support for this view has fallen sharply: 54% (-7) of respondents share this view, while 30% (+5) take the opposite view.

Support for EU membership has declined in Serbia (36%, -3 percentage points), while opposition has gained ground (25%, +4) and neutral opinions are unchanged at 32% (+1). The indicator of expected benefits mirrors this trend: 42% (-4) consider that Serbia would benefit from EU membership, while 34% (+5) take the opposite view and 24% (-1) expressed no opinion.

Support for EU membership has deteriorated sharply in Turkey. The proportion of respondents in Turkey who are in favour of EU membership is unchanged (38%) since spring 2013, but opposition has increased considerably (37%, +6 percentage points). As a result, the opinion ratio has narrowed very sharply in Turkey. 17% (-4) are neutral about EU membership. The belief that Turkey would not benefit from EU membership has risen by eight percentage points to 45%, while the view that it would benefit has lost ground (43%, -5). As a result of these significant changes, the opinion ratio for this indicator of the perceived benefits of EU membership has been reversed and is now negative in Turkey.

Support for EU membership has increased very strongly in Iceland: for the first time, supporters and opponents of EU membership are evenly balanced. Opinions are now more or less evenly split three ways: 33% of respondents in Iceland consider that their country’s membership of the EU would be a “good thing” (+9 percentage points), while 33% (-9) are against the idea and 29% (unchanged) are neutral or expressed no opinion.

Although respondents are still more likely to think that joining the European Union would bring no benefits, the opinion ratio has narrowed significantly: 48% (-9) of respondents in Iceland consider that their country would not benefit from EU membership, while 40% (+7) instead say that their country would benefit from doing so.

1.3. How to face the future?

- The need for union is supported by an absolute majority of Europeans -

An absolute majority of Europeans consider that their country would not be better equipped to face the future outside the European Union (56% "disagree" with the statement that their country "could better face the future outside the EU", unchanged since spring 2013). In contrast, 33% (=) agree with this statement and 11% (=) expressed no opinion[11].

The belief that it is better to face the future inside the EU is less prevalent among non-euro area respondents (49% versus 39%) than among euro area respondents (60% versus 30%).

The idea that EU membership is necessary to face the challenges ahead is dominant in 26 of the 28 EU countries, and is even supported by an absolute majority in 23 countries, led by in Luxembourg (78%), Estonia (75%), the Netherlands (75%) and Denmark (74%).

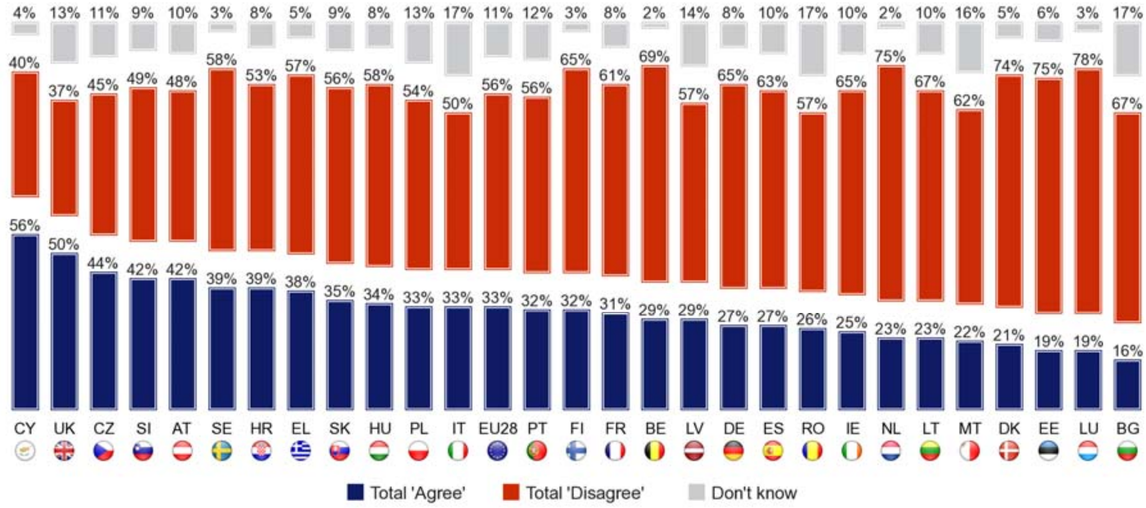
The opinion ratio is significantly narrower than average in Slovenia (49% versus 42%), Austria (48% versus 42%) and the Czech Republic (45% versus 44%).

Cyprus (56% versus 40%) and the United Kingdom (50% versus 37%) are the only two countries where a majority of respondents consider that their country could better face the future outside the EU.

This opinion has gain substantial ground in Cyprus (+10 percentage points), so much so that the opinion ratio has been reversed (56%, versus 40%, -7). Support for this belief has fallen sharply in Finland (32%, -8) and Poland (33%, -7), and to a lesser extent in the United Kingdom (50%, -3), where it nevertheless remains the majority view, as was the case in the Standard Eurobarometer survey of spring 2013 (EB79).

[11] QA19a10. Please tell me to what extent you agree or disagree with each of the following statements. (OUR COUNTRY) could better face the future outside the EU.

QA19a.10. Please tell me to what extent you agree or disagree with each of the following statements.
(OUR COUNTRY) could better face the future outside the EU

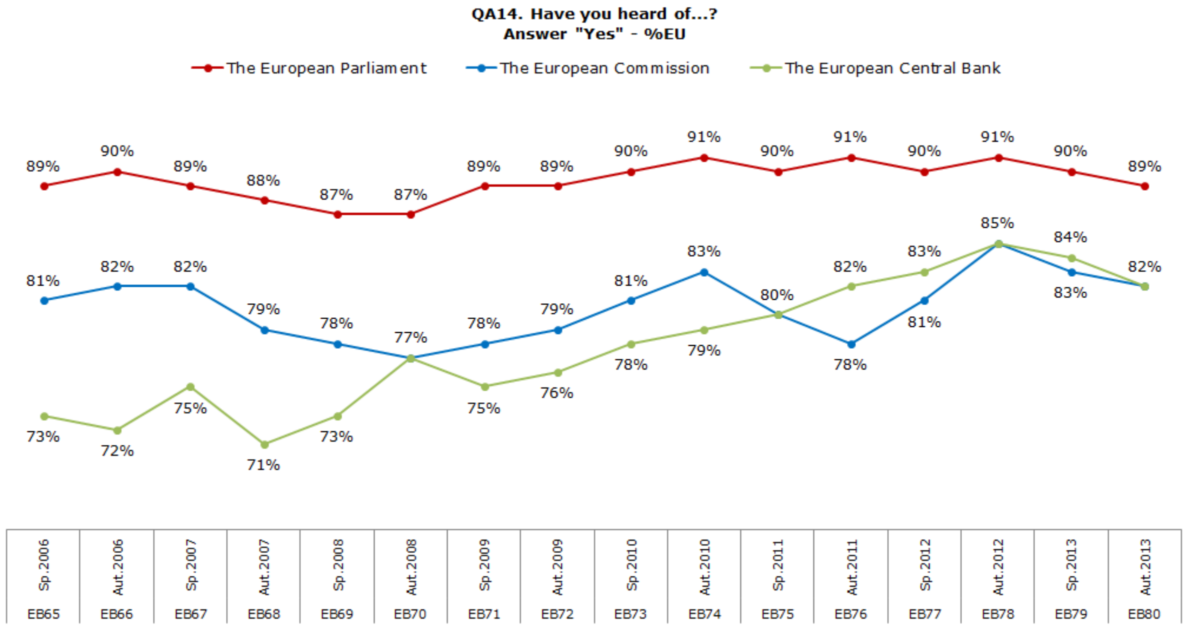


2. THE EUROPEAN INSTITUTIONS

2.1. Awareness of and trust in the European institutions

Awareness of the European institutions

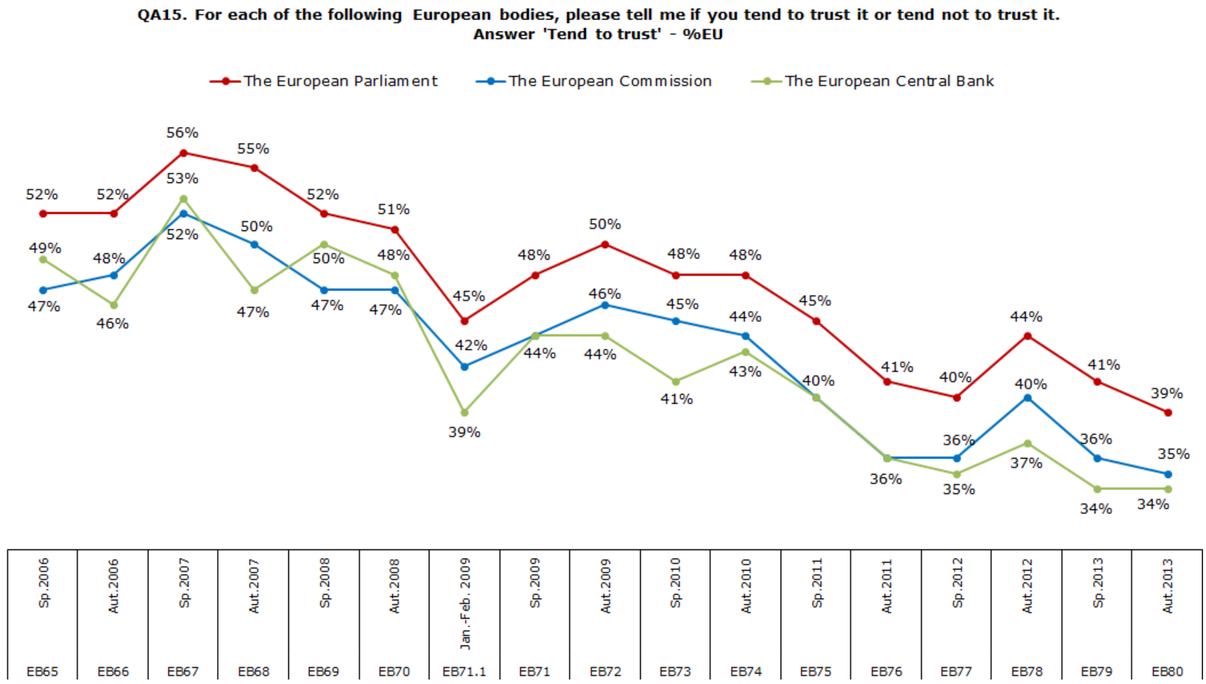
Since the record scores in the Standard Eurobarometer survey of autumn 2012 (EB78), awareness of the European institutions has tended to decline, as confirmed by this latest survey. Since spring 2013, awareness of the European Parliament (89%, -1 percentage point), the European Commission (82%, -1) and the European Central Bank (82%, -2) has thus fallen slightly.[12]



Trust in the European institutions

Except for the Standard Eurobarometer survey of autumn 2012 (EB78), characterised by a rebound, all the Eurobarometer surveys since autumn 2009 have recorded a decline in trust in the European institutions. Although the evolutions are minor, this trend has not been halted in this Eurobarometer survey; trust in the European Parliament and the European Commission has slipped further and has now reached record lows. Trust in the European Central Bank has stabilised at a low level[13].

[12] QA14.1+2+3+4+5 Have you heard of...? The European Parliament/The European Commission/The European Central Bank/The Council of the European Union/The Court of Justice of the European Union
[13] QA15.1+2+3+4 +5. For each of the following European bodies, please tell me if you tend to trust it or tend not to trust it. The European Parliament; The European Commission; The Council of the European Union; The European Central Bank; The Court of Justice of the European Union.



In this survey, trust in the European Parliament and the European Commission has fallen particularly sharply in Malta and the United Kingdom.

The European Parliament

39% of Europeans (-2 percentage points since spring 2013) trust the European Parliament, while 48% (+1) distrust it and 13% (+1) expressed no opinion. The trust index[14] for the European Parliament has thus lost three percentage points in this survey and now stands at -9, the lowest level ever recorded in Standard Eurobarometer surveys.

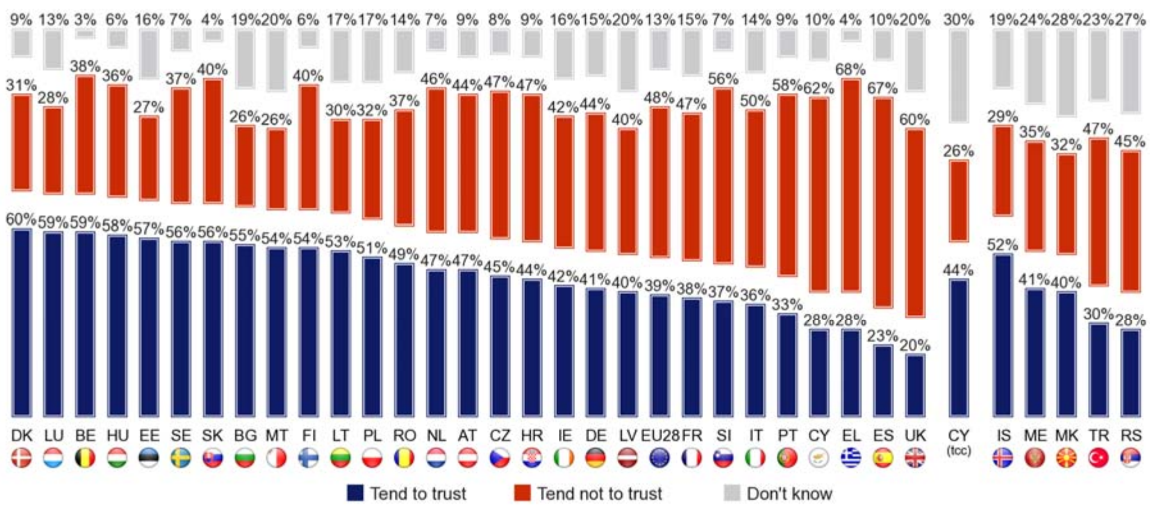
In this survey, the ratio of trust to distrust has been reversed in four countries. It is now slightly positive in Austria (47% versus 44%, compared with 45% versus 46% in spring 2013). But it has been reversed in the negative direction in Germany (41% versus 44%, compared with 44% versus 43%), Croatia (44% versus 47%, compared with 48% versus 42%) and in the Czech Republic (45% versus 47%, compared with 47% versus 46% in spring 2013). It has shifted from positive to evenly balanced in Latvia (40% versus 40%, compared with 44% versus 36% in spring 2013); from evenly balanced to negative in France (38% versus 47%, compared with 42% versus 42%); and from negative to evenly balanced in Ireland (42% versus 42%, compared with 39% versus 45% in spring 2013).

[14] Difference between the “tend to trust” and “tend not to trust” percentages

As a result of these changes, distrust now outweighs trust in 11 EU countries, two more than in the spring 2013 Eurobarometer survey (EB79) and seven more than in autumn 2012. This list comprises Croatia, France, Germany and the Czech Republic, plus Greece (68% distrust, -1 percentage point), Spain (67%, -2), Cyprus (62%, -3), the United Kingdom (60%, -2) Portugal (58%, -2), Slovenia (56%, unchanged) and Italy (50%, +6). In these Member States where majorities tend not to trust this institution, the trust index has deteriorated the most sharply in Italy (from -3 in spring 2013, to -14), Croatia (from +6, to -3) and France (from 0, to -9).

Trust in the European Parliament is therefore now predominant in 15 Member States, led by Denmark (60%, -5 percentage points), Luxembourg (59%, +2), Belgium (59%, +1) and Hungary (58%, -2). Within this group of countries where trust is in the majority, the index has nevertheless deteriorated significantly in Malta (from +40 in spring 2013, to+28), Denmark (from +37, to +29), Bulgaria (from +37 to +29) and Lithuania (from +31 to +23). The most marked improvement was recorded in in Luxembourg (from +22 to +31).

QA15.1. And please tell me if you tend to trust or tend not to trust these European institutions.
The European Parliament



The European Commission

With a score of 35%, trust in the European Commission has decreased slightly, by one percentage point, since spring 2013, while distrust is stable at 47%. The trust index has therefore lost one percentage point and now stands at -12, the lowest ever level recorded in the Standard Eurobarometer surveys.

At the time of the previous spring 2013 survey, the trust index for the European Commission had become negative for the first time in the non-euro area countries. It is still negative in this survey (37% versus 42%) and has not changed significantly since spring 2013. It also remains negative, without any significant change, in the euro area countries (33% versus 50%).

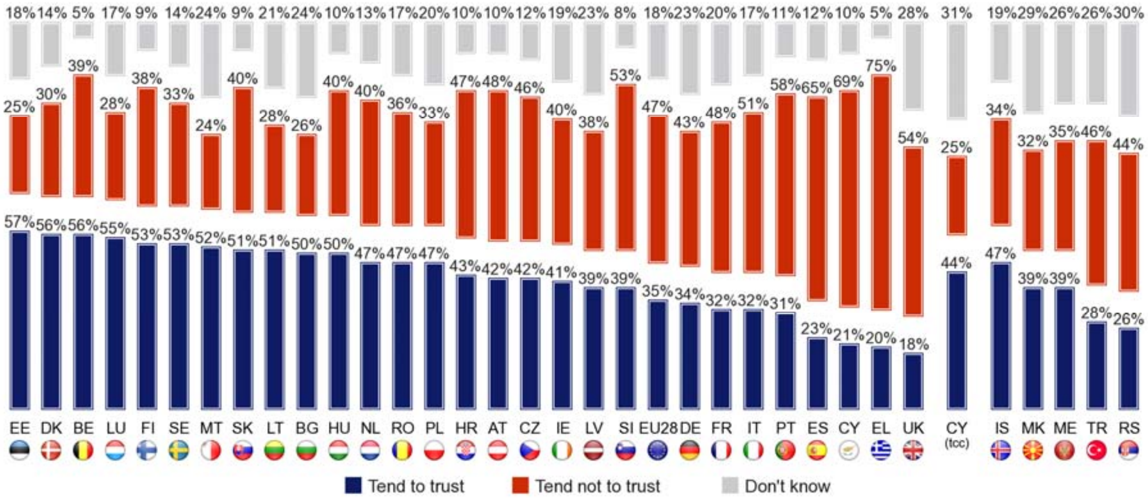
In this survey, the opinion ratio has become positive again in Ireland (41% versus 40%), whereas it was negative in spring 2013 (36% versus 45%). It has become negative in Croatia (43% versus 47%), whereas it was positive (45% versus 42%) in the spring 2013 survey.

Trust in the European Commission is dominant in 16 Member States: Estonia (57%, +3 percentage points), Denmark (56%, -4), Belgium (56%, +3), Luxembourg (55%, -1), Finland (53%, +2), Sweden (53%, +1), Malta (52%, -5), Lithuania (51%, -4), Slovakia (51%, unchanged), Bulgaria (50%, -3), Hungary (50%, -5), the Netherlands (47%, -2, versus 40%, +2), Poland (47%, -2, versus 33%, -3), Romania (47%, +2, versus 36%, -2), and has a scant majority in Ireland (41%, +5, versus 40%, -5) and Latvia (39%, -1, versus 38%, +2).

A majority of respondents therefore distrust the European Commission in 12 EU countries, namely Greece (75%, -2 percentage points), Cyprus (69%, -4), Spain (65%, -4), Portugal (58%, -1), the United Kingdom (54%, -4), Slovenia (53%, +1), Italy (51%, +6), France (48%, +7, versus 32%, -6), Austria (48%, -2, versus 42%, +3), Croatia (47%, +5, versus 43%, -2), the Czech Republic (46%, unchanged, versus 42%, -2), and Germany (43%, -2, versus 34%, =). Within this group of countries, France (where the index has fallen from -3 in spring 2013 to -16 now) and Italy (-19 versus -10) stand out by the sharp deterioration in the index of trust in the European Commission. Conversely, the index has improved significantly in Spain (-42 versus -52) and Cyprus (-48 versus -57).

QA15.2. And please tell me if you tend to trust or tend not to trust these European institutions.

The European Commission



The European Central Bank

Trust in the European Central Bank has stabilised at a low level (34%, unchanged), while distrust has decreased slightly (49%, -2 percentage point). The trust index has therefore improved slightly, up two percentage points to -15, compared with -17 in spring 2013, -12 in autumn 2012, -14 in spring 2012 and -10 in autumn 2011.

Albeit with a slightly lower score, an absolute majority of euro area respondents still continue to distrust the ECB (54%, -1 percentage point), as do a relative majority of respondents in the non-euro area countries (41%, -4, versus 36%, unchanged).

Compared with spring 2013 the trust index is now positive in Poland (+6 versus -2) and Romania (+3 versus 0).

As a result of these evolutions, distrust of the European Central Bank is now predominant in 12 Member States (Germany, Ireland, Greece, Spain, France, Italy, Cyprus, Hungary, Croatia, Portugal, Slovenia and the United Kingdom). Within this group of countries, the most striking change is the sharp improvement in the trust index in Ireland (now -14 versus -25 in spring 2013).

Trust is predominant in the 16 remaining countries, most notably in Finland (64%), Denmark (60%) and Luxembourg (58%, +3 percentage points). It has increased strongly in Finland (+8) but has fallen sharply in Denmark (-7).

Respondents who are familiar with the European institutions are more likely to trust them than Europeans on average: slightly more likely in the case of the European Parliament (42%, versus 39% for Europeans as a whole) and considerably more likely for the European Central Bank (39/34) and the European Commission (41/35). Levels of distrust are similar to the European averages. Accordingly, the "DK" rate is logically below the European average among Europeans who are familiar with the institutions.

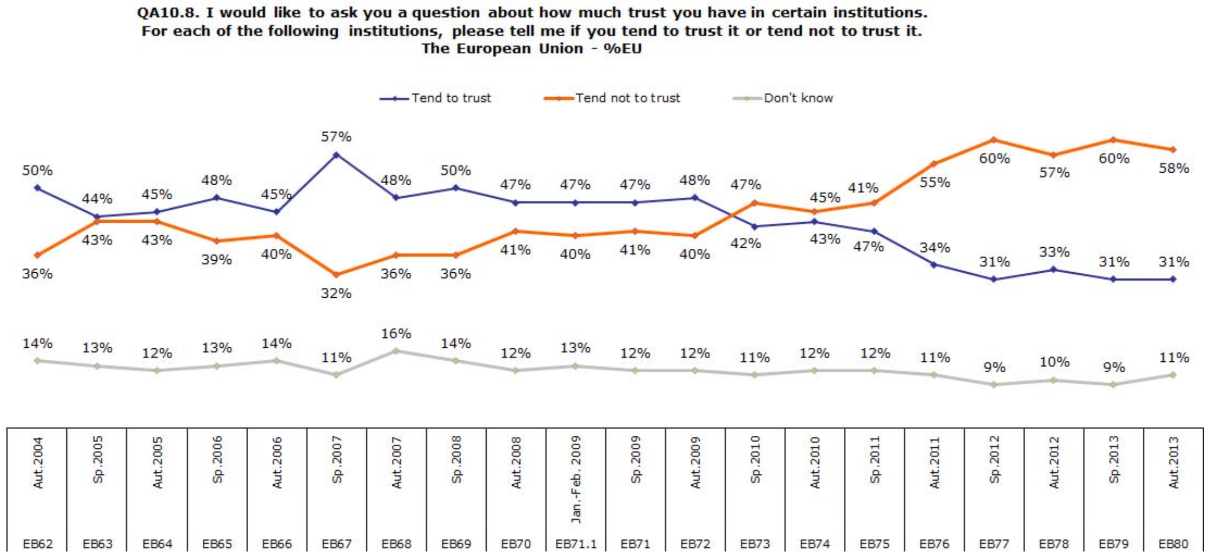
The answers of respondents who are not familiar with these institutions are characterised above all by a very high "DK" rate on questions of trust in the institutions: 37% for the European Parliament, 50% for the European Commission and 52% for the European Central Bank. Within this category of Europeans, the level of distrust in the European institutions is not generally higher the European average: though it is just one percentage point above this average in the case of the European Parliament (49% versus 48%), it is eight percentage points lower for the European Commission (39/47) and as much as nine percentage points lower for the European Central Bank (40/49). On the other hand, the differences are huge in the case of trust: trust in the Central Bank is thus 26 percentage points below the European average (8% versus 34%), while the difference for the European Parliament is 25 percentage points (14/39) and that for the European Commission is 24 percentage points (11/35).

Therefore, among respondents who are not familiar with the European institutions, it is more a question of low trust levels than of widespread distrust.

2.2. Trust in the European Union

- Trust in the EU has stabilised at its lowest ever level -

Trust in the European Union has stabilised at an historic low. However, as a result of the slight decrease in distrust (-2 percentage points), the trust index has improved significantly since the spring 2013 Eurobarometer survey (EB79): it is now -27 versus -29 in spring 2013. Currently, 58% of Europeans (-2) say they do not trust the European Union, while 31% (unchanged) tend to trust it and 11% (+2) expressed no opinion[15].



The ratio of trust to distrust, which remains generally unchanged since spring 2013, is still negative in the euro area countries (28% versus 62%, compared with 29% versus 62% in spring 2013). It remains predominantly negative, but with a trend towards improvement, in the non-euro area countries (36% versus 52%, compared with 34% versus 55% in spring 2013).

Trust in the EU is stable or has gained ground in 20 of the 28 Member States, the greatest improvements being recorded in Estonia (+10 percentage points), Poland (+6), Finland (+6) and Latvia (+6). In this survey it has fallen significantly only in France (-6) and Denmark (-6).

As a result of these changes, the trust index has recovered spectacularly in Poland, improving from -12 in spring 2013 to +6 now. But the opinion ratio is now negative in Denmark (the index now stands at -2 versus +6 in spring 2013).

[15] QA10.8. For each of the following institutions, please tell me if you tend to trust it or tend not to trust it. The European Union

However, except in Poland, the general slight uptrend in trust in the EU is still too modest to reverse the opinion ratios in the Member States. Thus, a majority of respondents trust the EU in only seven Member States, as was already the case in spring 2013: Poland, plus Bulgaria (56% versus 29%), Estonia (56% versus 33%), Lithuania (52% versus 35%), Malta (52% versus 31%), Romania (48% versus 42%) and Hungary (47% versus 46%). Denmark is now no longer part of this group, since only a minority of respondents there now trust the EU.

As a result of minor changes (+1 percentage point for trust, -2 for distrust), opinions are now evenly balanced in Belgium (49% versus 49%), whereas the opinion ratio was slightly negative in spring 2013.

Consequently, a majority of respondents in 20 Member States distrust the European Union, led by Greece (77%, -3 percentage points), Cyprus (75%, -8), Spain (71%, -4), Portugal (68%, -3), the United Kingdom (67%, -1), France (63%, +6), Italy (62%, +1) and the Czech Republic (61%, +1). Within this group of countries in which majorities distrust the EU, the most significant changes are the very marked improvements in the trust index in Finland (from -13 in spring 2013 to -1 now), Latvia (from -15 to -3), Cyprus (from -70 to -58) and Ireland (from -32 to -21).

In the **candidate countries**, the index of trust in the European Union is still positive, but it has deteriorated significantly in the Former Yugoslav Republic of Macedonia (+8 versus +14 in spring 2013). It has worsened dramatically, becoming negative, in Montenegro (-8 versus +9). It is still markedly negative in Turkey, where it has deteriorated even further (-41 versus -31). However, it has improved slightly in Serbia (-25 versus -26) and Iceland (-9 versus -12), while remaining negative there too.

QA10.8. I would like to ask you a question about how much trust you have in certain media and institutions. For each of the following media and institutions, please tell me if you tend to trust it or tend not to trust it.

The European Union

	Tend to trust	Diff. Aut.2013 - Sp. 2013	Tend not to trust	Diff. Aut.2013 - Sp. 2013
EU28	31%	=	58%	-2
BG	56%	+2	29%	+1
EE	56%	+10	33%	-10
LT	52%	+1	35%	-3
MT	52%	-1	31%	+2
BE	49%	+1	49%	-2
RO	48%	+3	42%	-1
HU	47%	=	46%	=
SK	47%	+2	49%	-1
FI	47%	+6	48%	-6
DK	45%	-6	47%	+2
PL	45%	+6	39%	-12
LV	42%	+6	45%	-6
LU	42%	-1	48%	-4
SE	40%	+4	55%	-5
AT	39%	+4	52%	-3
NL	38%	+1	55%	-3
SI	37%	+3	58%	-5
HR	36%	-3	57%	+3
CZ	34%	-1	61%	+1
IE	34%	+5	55%	-6
DE	29%	=	59%	-2
FR	28%	-6	63%	+6
PT	25%	+1	68%	-3
IT	23%	-2	62%	+1
EL	21%	+2	77%	-3
ES	21%	+4	71%	-4
UK	19%	-1	67%	-1
CY	17%	+4	75%	-8
CY (tcc)	57%	+3	28%	-10
MK	48%	-5	40%	+1
IS	40%	=	49%	-3
ME	40%	-9	48%	+8
RS	31%	-2	56%	-3
TR	24%	-5	65%	+5

A socio-demographic analysis reveals significant differences reflecting the categories of the respondents: with the sole exception of students, for whom trust narrowly outweighs distrust (45% versus 41%), a majority of all socio-demographic categories in the population now distrust the European Union. A relative majority of 15-24 year-olds (46% versus 41%) and an absolute majority of those who studied the longest (54%), managers (52%) and those who place themselves at the top of the social scale (51%) do not trust the European Union. This distrust is even more widespread among the more modest and vulnerable categories, which are traditionally less pro-European: thus, more than two-thirds of those who regularly struggle to pay their bills, of unemployed people and of the least educated respondents distrust the EU.

QA10.8. I would like to ask you a question about how much trust you have in certain media and institutions. For each of the following media and institutions, please tell me if you tend to trust it or tend not to trust it.

The European Union

	Tend to trust	Tend not to trust	Don't know
EU28	31%	58%	11%
Gender			
Man	32%	59%	9%
Woman	29%	58%	13%
Age			
15-24	41%	46%	13%
25-39	34%	57%	9%
40-54	29%	61%	10%
55 +	26%	63%	11%
Education (End of)			
15-	21%	67%	12%
16-19	28%	61%	11%
20+	37%	54%	9%
Still studying	45%	41%	14%
Socio-professional category			
Self-employed	32%	59%	9%
Managers	40%	52%	8%
Other white collars	33%	57%	10%
Manual workers	29%	60%	11%
House persons	24%	63%	13%
Unemployed	24%	67%	9%
Retired	27%	62%	11%
Students	45%	41%	14%
Difficulties paying bills			
Most of the time	19%	71%	10%
From time to time	29%	60%	11%
Almost never/ Never	35%	55%	10%
Self-positioning on the social staircase			
Low (1-4)	23%	66%	11%
Medium (5-6)	30%	59%	11%
High (7-10)	40%	51%	9%

The following table shows the results by socio-demographic criteria in the six largest EU countries and in four countries which have been particularly badly affected by the economic crisis.

QA10.8. I would like to ask you a question about how much trust you have in certain media and institutions. For each of the following media and institutions, please tell me if you tend to trust it or tend not to trust it.

The European Union - Tend to trust

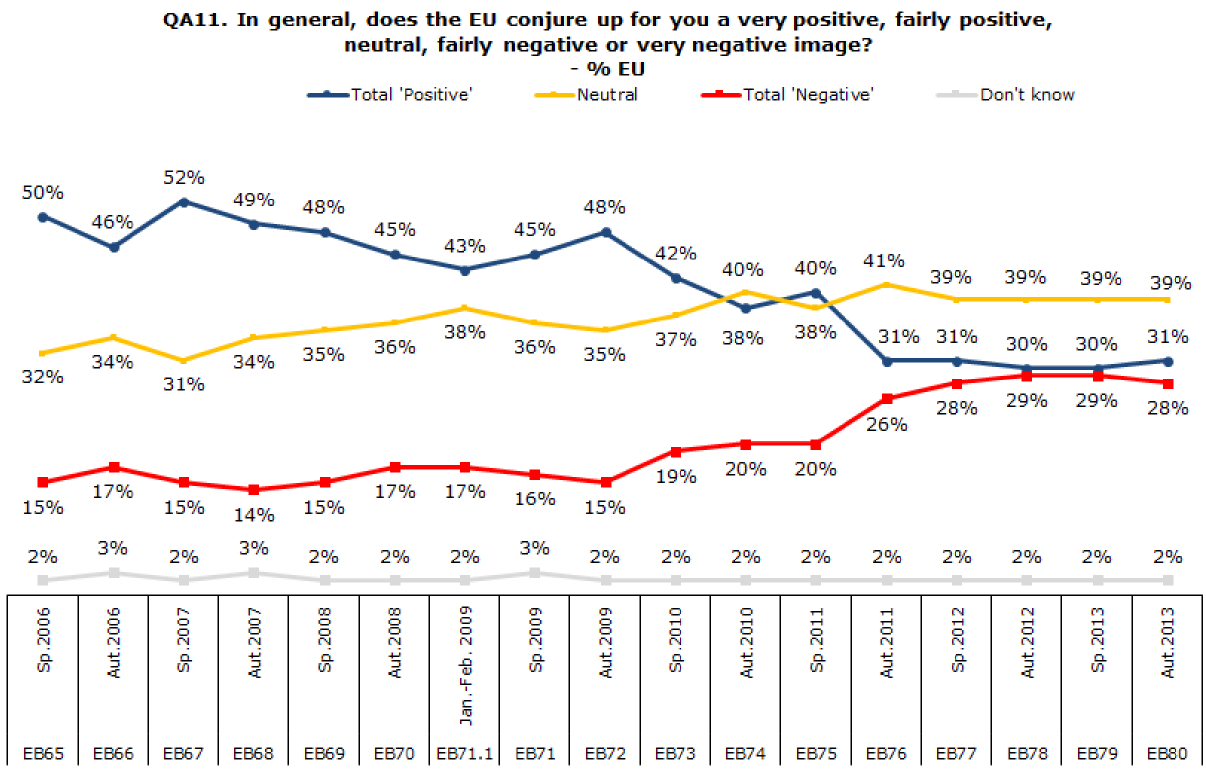
	EU28	DE	ES	FR	IT	PL	UK	EL	PT	IE	CY
	31%	29%	21%	28%	23%	45%	19%	21%	25%	34%	17%
Gender											
Male	32%	29%	23%	31%	25%	46%	21%	22%	29%	35%	17%
Female	29%	28%	20%	25%	22%	45%	16%	19%	21%	32%	18%
Age											
15-24	41%	34%	28%	43%	28%	53%	29%	29%	42%	34%	14%
25-39	34%	38%	20%	27%	21%	49%	23%	17%	26%	34%	18%
40-54	29%	27%	23%	23%	23%	46%	19%	21%	28%	32%	16%
55 +	26%	23%	19%	25%	23%	37%	11%	19%	17%	33%	19%
Education (End of)											
15-	21%	25%	18%	17%	18%	28%	10%	15%	18%	25%	15%
16-19	28%	25%	22%	20%	22%	39%	15%	18%	31%	27%	13%
20+	37%	32%	22%	35%	28%	54%	28%	23%	39%	45%	23%
Still studying	45%	41%	28%	55%	32%	58%	36%	32%	37%	40%	21%
Socio-professional category											
Self-employed	32%	41%	30%	26%	23%	42%	23%	23%	29%	42%	12%
Managers	40%	31%	40%	46%	26%	55%	25%	24%	40%	40%	36%
Other white collars	33%	31%	26%	21%	30%	48%	22%	18%	35%	43%	16%
Manual workers	29%	29%	17%	22%	20%	48%	14%	19%	31%	28%	12%
House persons	24%	22%	18%	12%	13%	49%	10%	15%	15%	30%	17%
Unemployed	24%	17%	18%	21%	15%	40%	21%	14%	20%	24%	10%
Retired	27%	23%	20%	24%	24%	37%	12%	22%	16%	33%	25%
Students	45%	41%	28%	55%	32%	21%	36%	40%	37%	58%	32%

2.3. The European Union's image

- Perceptions of the EU's overall image are relatively stable -

The Standard Eurobarometer survey of autumn 2011 (EB76) revealed a sharp deterioration in the European Union's image. Since then opinions have remained predominantly neutral, only minor evolutions have been recorded for this indicator and the trend has been towards stabilisation of the EU's image at a low level. Thus, since spring 2013, positive perceptions have gained one percentage point (31%), while negative perceptions have fallen by one percentage point (28%). Neutral opinions remain stable, with a majority score of 39%[16]. **Although these changes are minimal, this is nevertheless the first time since the autumn 2009 survey (EB72) that negative judgments have decreased.**

[16] QA11. In general, does the EU conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image?



Positive opinions exceed negative opinions, and have gained ground, in the non-euro area countries (34% versus 24%, compared with 32% versus 27% in spring 2013). Positive and negative opinions are almost evenly balanced in the euro area countries (29% versus 30%, compared with 29% versus 29% in spring 2013). In both groups of countries opinions are predominantly neutral.

A detailed national analysis of the results reveals that in 20 Member States, the European Union conjures up a neutral image for the majority of the population, the highest scores being recorded in the three Baltic States (Latvia (56%), Estonia (55%), and Lithuania (50%)), and Finland (50%). A majority of respondents see its image as positive in Bulgaria (49% total “positive” total versus total 14% “negative”), Poland (45% versus 10%), Romania (43% versus 13%) and Ireland (40% versus 23%). In contrast, a majority of respondents in Greece (54% total “negative” total versus 16%), Cyprus (54% versus 17%), Portugal (39% versus 22%) and the United Kingdom (39% versus 22%) perceive the image of the EU as negative.

Although stable at European level, neutral opinions on the European Union have gained ground since the Standard Eurobarometer survey of spring 2013 (EB79) in 19 Member States, led by in Croatia (43%, +7 percentage points), Finland (50%, +6), Malta (43%, +6) and Luxembourg (40%, +6). They have declined the most in Greece (29%, -5).

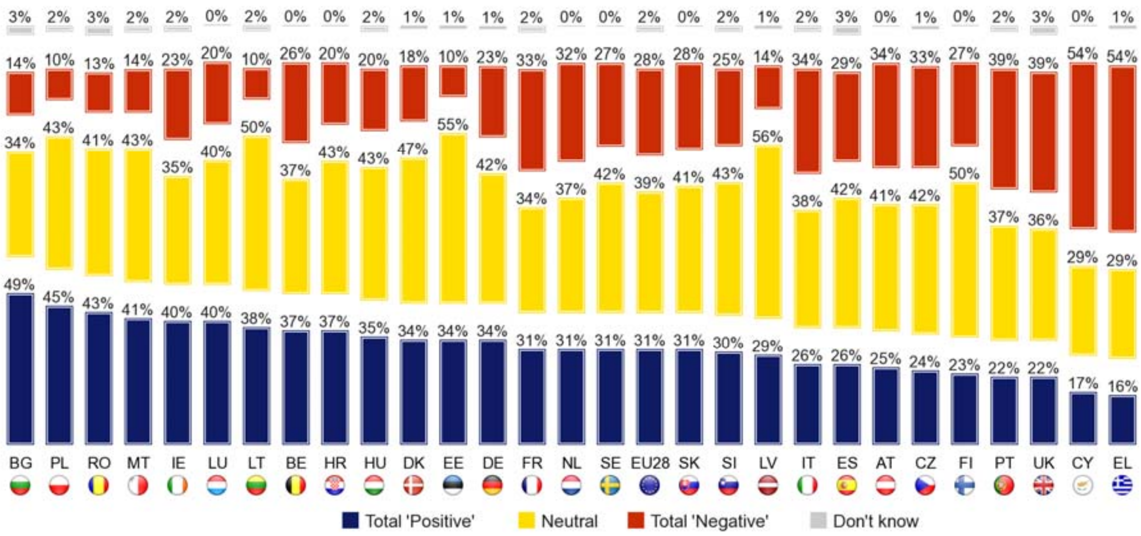
The opinion ratio (difference between the "positive" and "negative" totals) has been reversed unfavourably in Italy and France, where negative opinions (34% and 33% respectively) now outweigh positive opinions (26% and 31% respectively), whereas the situation was the opposite in spring 2013. Negative opinions have increased by ten percentage points in Italy and by six percentage points in France.

Therefore, these two countries have now joined the group of 11 Member States where negative opinions of the EU's image outweigh positive opinions, alongside Greece (54% for the "negative" total, +4, versus 16%, unchanged), Cyprus (54%, -5, versus 17%, =), Portugal (39%, -3, versus 22%, =), the United Kingdom (39%, -4, versus 22%, +1), Austria (34%, =, versus 25%, -2), the Czech Republic (33%, -3, versus 24%, -1), the Netherlands (32%, -2, versus 31%, +4), Spain (29%, -9, versus 26%, +6) and Finland (27%, -7, versus 23%, +1).

In contrast, the opinion ratio has been reversed favourably in Sweden (31% versus 27%, compared with 29% versus 34%).

Sweden has joined the group of 17 Member States where positive perceptions of the EU's image outweigh negative opinions (Bulgaria, Poland, Romania, Malta, Ireland, Luxembourg, Lithuania, Belgium, Croatia, Hungary, Denmark, Estonia, Germany, Slovakia, Slovenia and Latvia), the highest levels being recorded in Bulgaria (49%, -5 percentage points) and Poland (45%, +2). Within this group, the most significant change is the sharp improvement of the EU's image in Ireland (40%, +7).

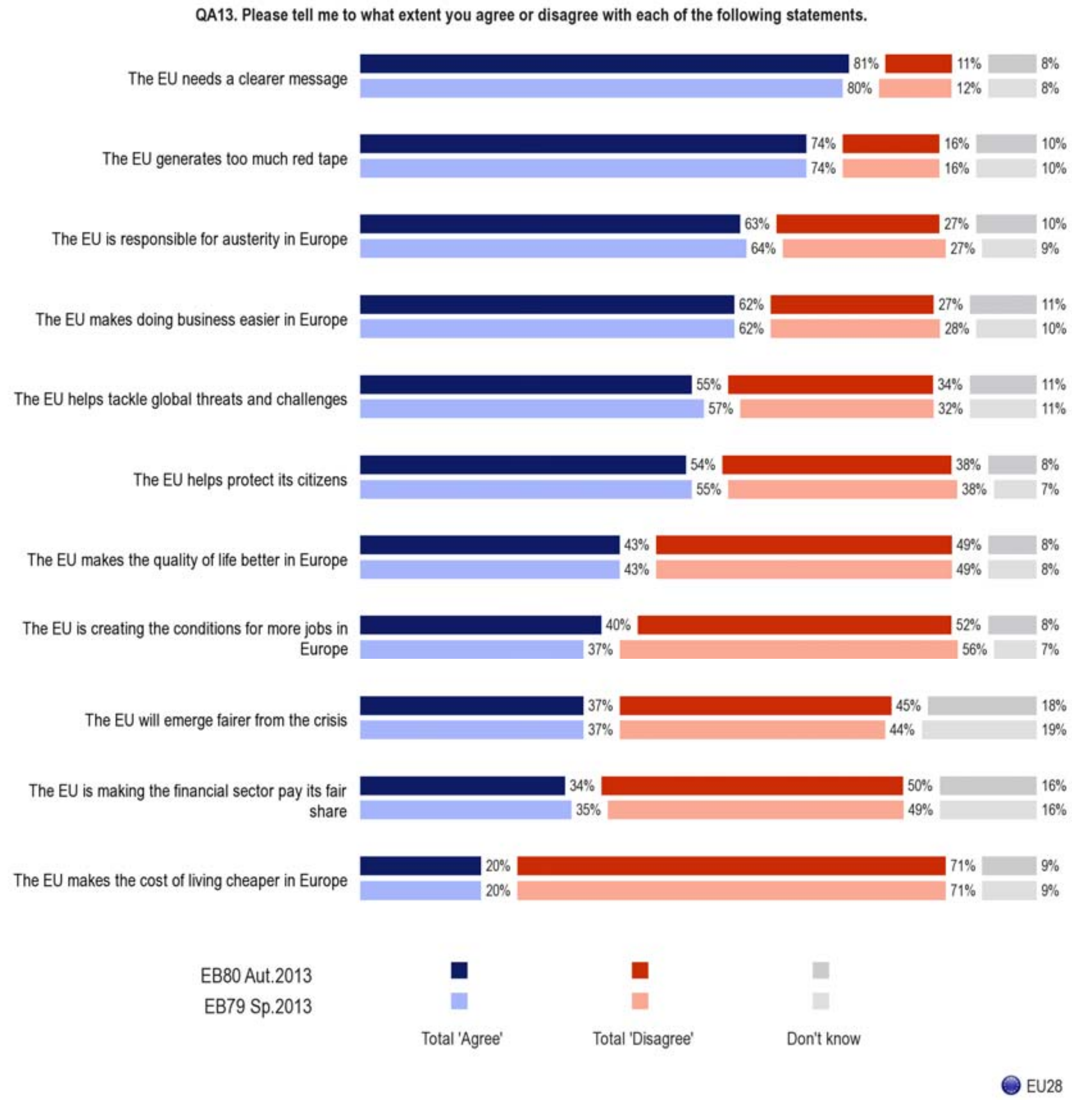
QA11. In general, does the EU conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image?



The detailed image of the European Union

This Eurobarometer survey includes questions on the various image attributes of the EU, which were tested for the first time in the spring 2013 survey (EB79). **On the positive side, the European Union is seen as business-friendly, an influential player on the international scene and an institution that protects its citizens.** On the negative side, it is perceived by a majority of Europeans as being bureaucratic, responsible for austerity in Europe, insufficiently fair and ineffective in tackling the economic and social issues that are at the heart of public concerns (jobs, purchasing power).

The order in which these various image attributes are ranked is similar to that measured in spring 2013, and it continues to be dominated by the absence of a clear EU message and by negative image attributes (bureaucracy, austerity). The only significant change in this survey is the improvement in perceptions (+3 percentage points) of the EU's ability to create the conditions for more jobs in Europe[17].



[17] QA13. Please tell me to what extent you agree or disagree with each of the following statements

Positive representations

<u>“The EU makes doing business easier in Europe”</u>

More than six out of ten Europeans (62%, unchanged since spring 2013) consider that the “EU makes doing business easier in Europe”, while 27% (-1 percentage point) take the opposite view and 11% (+1) expressed no opinion.

This view is shared by a majority of respondents in all the Member States, apart from Greece (38% for the “agree” total, versus 58%) and Italy (42% versus 45%).

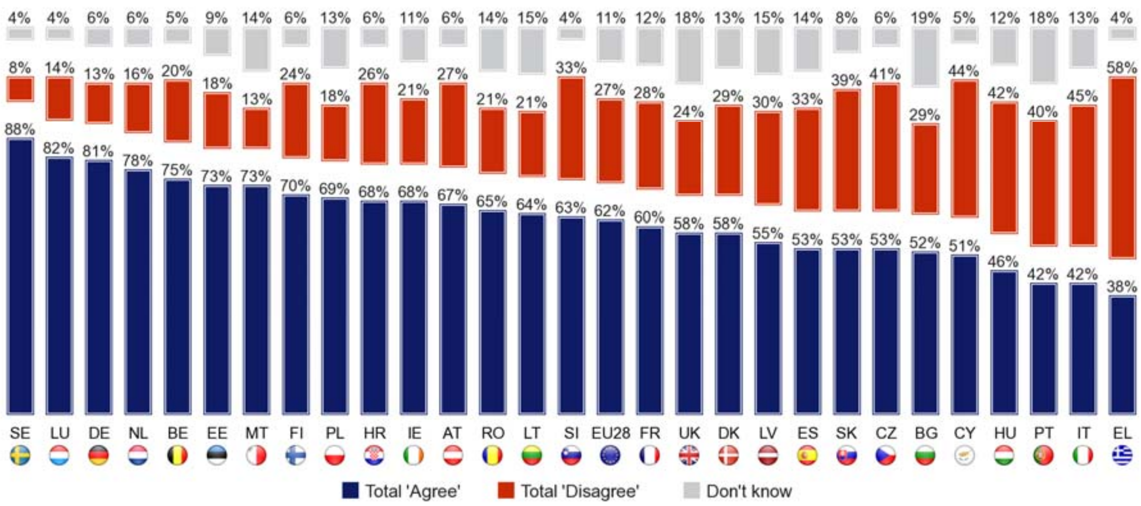
The proportion of respondents who agree that the EU is business-friendly has fallen sharply in Croatia (-7 percentage points) and Italy (-6) and has become the minority opinion, whereas it was the majority opinion in spring 2013. The opposite is true in Cyprus, where this representation has gained ten percentage points and is now shared by a majority of respondents compared with a minority in spring 2013.

Respondents in Sweden (88%), Luxembourg (82%), Germany (81%) and the Netherlands (78%) are the most likely to believe that the EU is business-friendly.

A socio-demographic analysis reveals that managers (76%), students (72%) and those who trust the European Union (80%) are the most likely to consider that the EU makes it easier to do business in Europe.

QA13.3. Please tell me to what extent you agree or disagree with each of the following statements.

The EU makes doing business easier in Europe



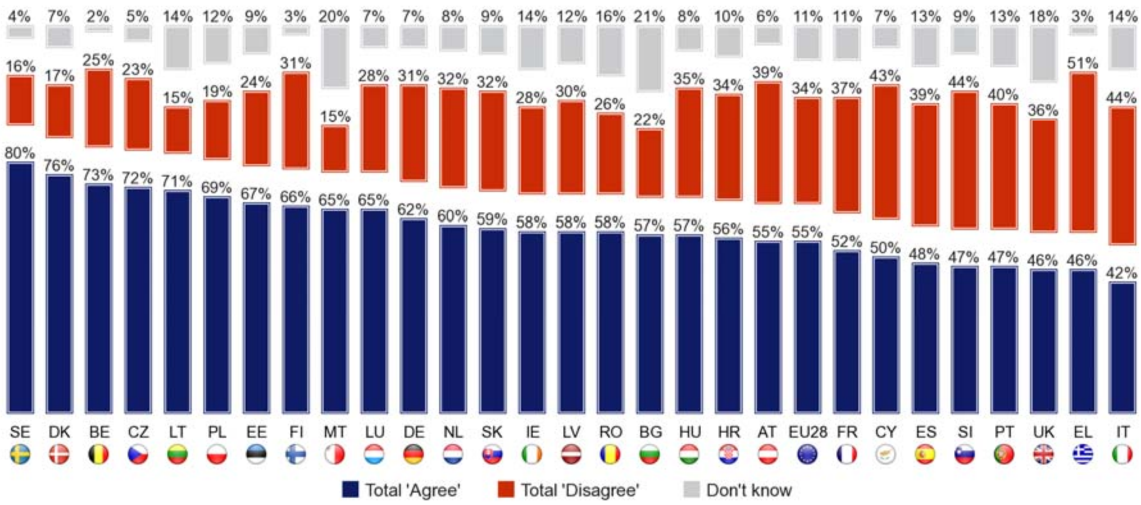
<u>“The EU as an international player that helps tackle global threats and challenges”</u>

An absolute majority of Europeans (55%, -2 percentage points) agree that the “EU helps tackle global threats and challenges”, while more than a third 34% (+2) disagree and 11% (unchanged) expressed no opinion.

Greece and Italy are the only two countries (51% and 44% respectively) where a majority of respondents do not acknowledge the international role of the EU in tackling global threats and challenges. Elsewhere, this idea is predominant and is supported by an absolute majority of respondents in 22 Member States, led by Sweden (80%), Denmark (76%), Belgium (73%) and the Czech Republic (72%).

The balance of opinion has been reversed and is now positive in Cyprus (50% "agree" that the EU helps tackle global threats and challenges, versus 43%, compared with 40% versus 53% in spring 2013), but has become negative in Italy (42% versus 44%, compared with 53% versus 36% in spring 2013).

QA13.9. Please tell me to what extent you agree or disagree with each of the following statements.
The EU helps tackle global threats and challenges

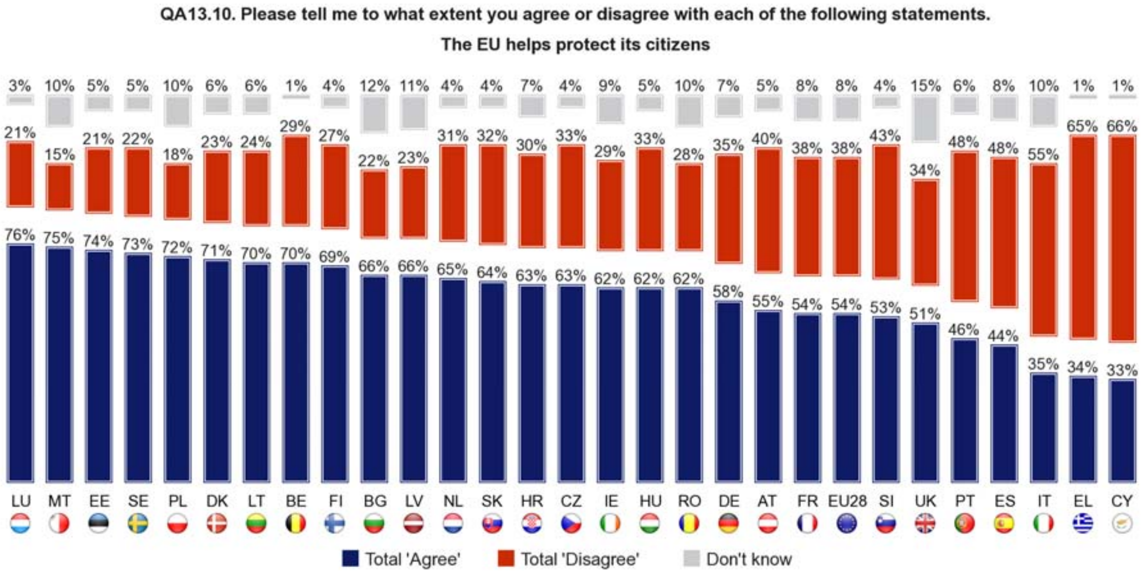


"The EU as an institution that helps protect its citizens"

54% of Europeans (-1 percentage point since spring 2013) agree that the "EU helps protect its citizens", while 38% (unchanged) disagree and 8% (+1) did not express an opinion.

This representation of the EU's protective role strikes a chord with an absolute majority of respondents in 23 Member States, most notably in Luxembourg (76%), Malta (75%), Estonia (74%), Sweden (73%) and Poland (72%). This perception has gained seven percentage points in Luxembourg, but has lost eight percentage points in Italy and six percentage points in Croatia since spring 2013.

Therefore, a majority of respondents in five countries do not see the EU as providing protection: Cyprus (66%), Greece (65%), Italy (55%), Spain (48% versus 44%) and Portugal (48% versus 46%). Within this group, the perception that the EU does not help protect its citizens has fallen sharply in Portugal (-7 percentage points) and Spain (-5). However, it has gained significant ground in Italy (+7).



A socio-demographic analysis highlights significant social divisions with regard to perceptions of the EU's protective role. While this role is widely acknowledged by those who studied up to the age of 20 or beyond, and those who almost never have difficulties paying their bills, it is rejected by a majority of those who left school at the age of 15 or earlier (48%) or who are disadvantaged socio-economically (53% of those who struggle most of the time to make ends meet).

QA13.10. Please tell me to what extent you agree or disagree with each of the following statements.

The EU helps protect its citizens

	Total 'Agree'	Total 'Disagree'	Don't know
EU28	54%	38%	8%
Gender			
Man	57%	38%	5%
Woman	51%	38%	11%
Age			
15-24	66%	26%	8%
25-39	58%	35%	7%
40-54	52%	41%	7%
55 +	48%	42%	10%
Education (End of)			
15-	40%	48%	12%
16-19	53%	39%	8%
20+	62%	32%	6%
Still studying	72%	21%	7%
Socio-professional category			
Self-employed	54%	40%	6%
Managers	65%	29%	6%
Other white collars	57%	36%	7%
Manual workers	55%	37%	8%
House persons	42%	48%	10%
Unemployed	46%	46%	8%
Retired	49%	40%	11%
Students	72%	21%	7%
Difficulties paying bills			
Most of the time	38%	53%	9%
From time to time	50%	42%	8%
Almost never/ Never	60%	32%	8%

Negative representations

“The EU as an institution that generates too much red tape”

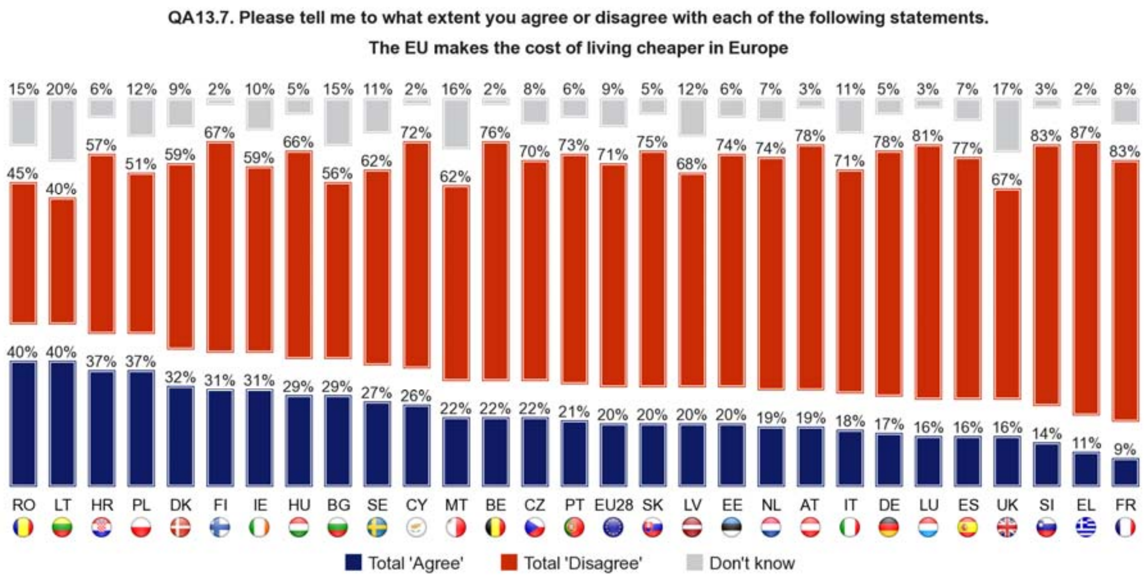
Almost three-quarters of Europeans (74% versus 16%; 10% expressed no opinion), unchanged since spring 2013, agree that “the EU generates too much red tape in Europe”. This idea is widely accepted: it is shared by an absolute majority of respondents in all Member States and across all European socio-demographic categories. The most significant evolution concerns Ireland, where the impression that the EU generates too much red tape has lost six percentage points, but is still the dominant opinion (71%).

"The EU is ineffective in making the cost of living cheaper in Europe"

More than seven out of ten Europeans (71%) do not think that the "EU makes the cost of living cheaper in Europe". Only 20% agree with this statement and 9% expressed no opinion. These percentages are identical to those recorded in spring 2013.

With the exception of Lithuania, where opinions are evenly balanced (40% versus 40%), and Romania, where there is only a relative majority (45% versus 40%), an absolute majority of respondents in all Member States, most notably in Greece (87%), Slovenia (83%), France (83%), Luxembourg (81%), Germany (78%) and Austria (78%), disagree that the EU plays a positive role in terms of purchasing power.

The feeling that the EU is ineffective in improving purchasing power has gained ground significantly in Croatia (+14 percentage points), which was not yet an EU Member State in spring 2013, and in Malta (+9). However it has lost significant ground in Poland (-7).



This impression that the EU is powerless to make the cost of living cheaper is shared by an absolute majority of respondents in all European socio-demographic categories.

"The EU is responsible for austerity in Europe"

Almost two out of three Europeans (63%, -1 percentage point) consider that "the EU is responsible for austerity in Europe". Just under a quarter of respondents (27%, unchanged) disagree with this statement and 10% (+1) expressed no opinion.

This view is shared by an absolute majority of respondents in 26 countries, led by Austria (80%), Greece (79%), Cyprus (77%), Belgium (77%) and Slovakia (76%), and by a relative majority in Estonia (46% versus 42%) and the United Kingdom (47% versus 34%). There is a broad consensus in both euro area and non-euro area countries that the EU is responsible for austerity, though this view has lost a little ground (-3 percentage points) in the non-euro area countries.

QA13.2 Please tell me to what extent you agree or disagree with each of the following statements.

The EU is responsible for austerity in Europe

	Total 'Agree'		Total 'Disagree'		Don't know	
	EB80 Aut. 2013	Diff. Aut.2013 - Sp. 2013	EB80 Aut. 2013	Diff. Aut.2013 - Sp. 2013	EB80 Aut. 2013	Diff. Aut.2013 - Sp. 2013
EU28	63%	-1	27%	=	10%	+1
EURO AREA	65%	=	27%	=	8%	=
NON-EURO AREA	59%	-3	27%	+1	14%	+2

A socio-demographic analysis reveals that a majority of respondents in all European social groups, irrespective of age, gender, length of studies or socio-professional category, believe that the EU is responsible for austerity.

<u>"The EU does not create the conditions for more jobs"</u>

An absolute majority of Europeans (52%, -4 percentage points since spring 2013) do not believe that "the EU creates the conditions for more jobs in Europe", while 40% (+3) take the opposite view and 8% (+1) expressed no opinion. **This is the image attribute that shows the greatest trend towards improvement.**

A national analysis reveals significant differences between countries in their assessment of the EU's employment measures. Opinions are generally negative in the euro area countries (61%), whereas they are positive in the non-euro area countries (53%).

Since spring 2013, the opinion ratio has been reversed and is now positive in four countries: the Czech Republic (51% consider that the EU creates the conditions for more jobs versus 45%, compared with 42% versus 53% in spring 2013), Ireland (52% versus 39%, compared with 40% versus 53%), Hungary (48% versus 47%, compared with 43% versus 52%) and Finland (51% versus 47%, compared with 47% versus 51%). Therefore, a majority of respondents look favourably on the EU's actions to boost jobs in 15 Member States, led by Poland (75%), Lithuania (69%) and Croatia (66%). This view has gained support since spring 2013 in Ireland (+12 percentage points), Sweden (+9), the Czech Republic (+9), Poland (+8) and Slovakia (+8).

In contrast, the EU's role in employment is perceived negatively in 13 countries, most notably in France (68%), Greece (64%), Spain (64%), Italy (64%), Cyprus (62%) and Portugal (60%), all countries with an unemployment rate higher than the EU28 average[18].

15-24 year-olds (52% "agree") and students (56%) are the two categories the most likely to see of the EU's role in employment in a favourable light. However, unemployed people (57% "disagree") and those with financial difficulties (63%) are very critical.

<u>"The EU is not making the financial sector pay its fair share"</u>

Half of Europeans (50%, +1 percentage point) consider that the EU is not "making the financial sector pay its fair share", while 34% (-1) take the opposite view and 16% (unchanged) expressed no opinion.

Respondents in the non-euro area countries (56% "disagree") are broadly convinced that the EU is not making the financial sector pay its fair share. However, a majority of non-euro area respondents (44% "agree" versus 36%) consider that it makes the sector pay a fair contribution.

The impression that the financial sector has not made an adequate contribution is predominant in 16 EU countries, led by Greece (67%), the Netherlands (64%) and Spain (64%). In this group of countries, this belief has lost ground significantly in Ireland (-10 percentage points) and the United Kingdom (-7), but is more widespread in Germany (+6).

A majority of respondents in 12 countries consider that the EU has extracted a fair contribution from the financial sector, the highest scores being recorded in Hungary (64%), Croatia (58%), Poland (58%) and Romania (57%).

[18] http://epp.eurostat.ec.europa.eu/cache/ITY_PUBLIC/3-31102013-BP/EN/3-31102013-BP-EN.PDF

A socio-demographic analysis reveals that a majority of respondents across all sections of the European population, including the best-off categories (48% versus 36% of those who almost never have difficulties paying their bills) and the most socially advantaged groups (49% versus 39% among those who place themselves at the top of the social scale, and 55% versus 34% among managers), feel that the financial sector has not been sufficiently called to account.

"The EU will not emerge fairer from the crisis"

Europeans continue to be strongly divided on this question, but a majority of them still think that the **EU will not emerge fairer from the crisis** (45% versus 37%, compared with 44% versus 37% in spring 2013).

The belief that the European Union will be less fair after the crisis is dominant and has gained ground slightly since spring 2013 in the euro area countries (50% versus 34%, compared with 47% versus 35%). A majority of non-euro area respondents continue to believe that the EU will emerge fairer from the crisis (42% versus 37%, compared with 42% versus 38%), slightly down on spring 2013.

In this survey, the opinion ratio has been reversed in three countries. A majority of respondents in Spain (43% versus 40%, compared with 37% versus 40%), Sweden (48% versus 43%, compared with 42% versus 49%) and Finland (52% versus 43%, compared with 46% versus 47%) now feel that the European Union will emerge fairer from the crisis. As a result, the number of Member States where a majority of respondents expect a fairer EU post-crisis now stands at 13, led by Ireland (55%), Malta (53%), Finland (52%), Poland (50%) and Lithuania (50%). This view has gained the most ground in Bulgaria (+6), Spain (+6), Finland (+6), Ireland (+6) and Sweden (+6).

Opinions are evenly divided in Belgium (48% versus 48%) and Luxembourg (44% versus 44%).

Therefore, a majority of respondents fear that the EU will not be fairer after the crisis in 13 countries, namely Greece (66%), Cyprus (57%), France (57%), Slovenia (57%), Germany (52%), Austria (51%), the Netherlands (49% versus 37%), Italy (49% versus 31%), Latvia (47% versus 37%), Portugal (45% versus 33%), the Czech Republic (45% versus 41%), Slovakia (43% versus 41%) and the United Kingdom (42% versus 35%). Although this fear has eased considerably in Cyprus (-11 percentage points), Slovenia (-5) and the Czech Republic (-3), it is more widespread in Italy (+5), Germany (+4), Portugal (+3) and France (+3).

A socio-demographic analysis reveals that although a relative majority of 15-24 year-olds (42% versus 39%), students (46% versus 36%) and those who place themselves at the top of the social scale (44% versus 42%) consider that the European Union will emerge fairer from the crisis, this view is shared by only a minority of respondents in all the other categories, including managers, those who studied the longest and those who do not have difficulties paying their bills.

<u>"The EU does not make the quality of life better in Europe"</u>

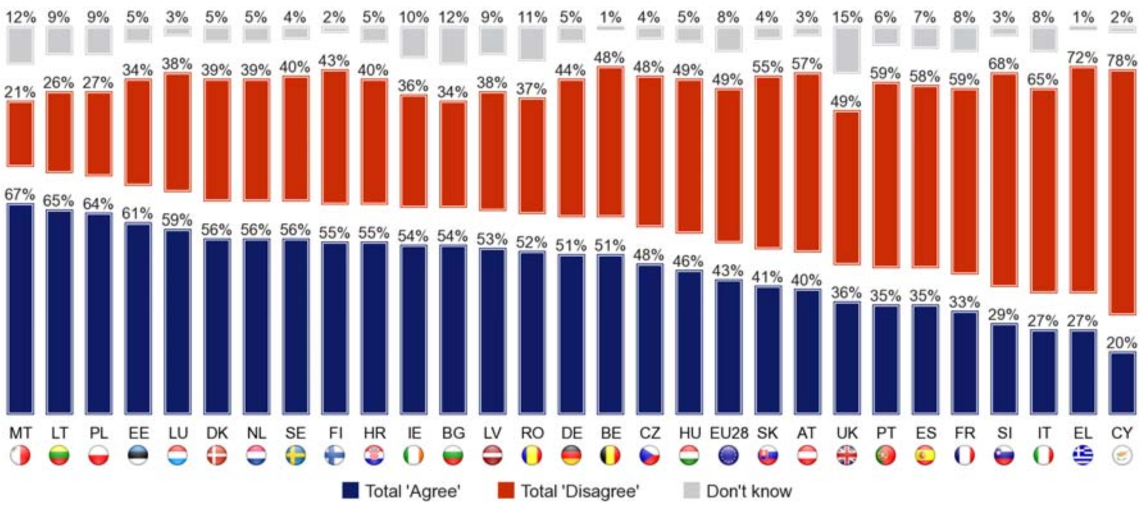
Almost half of Europeans (49%) now consider that the EU does not improve the quality of life in Europe, while 43% take the opposite view and 8% expressed no opinion. These proportions are unchanged since spring 2013.

There are significant differences between countries regarding the EU's ability to improve the quality of life

An absolute majority of respondents in the euro area countries (55%) "disagree" that "the EU makes the quality of life better in Europe" whereas the opposite view is predominant in the non-euro area countries (50% "agree").

The view that the EU improves the quality of life is supported by a majority of respondents in 15 Member States, led by Malta (67%), Lithuania (65%), Poland (64%) and Estonia (61%). Respondents in 11 countries are predominantly negative, most notably in Cyprus (78%), Greece (72%), Slovenia (68%), Italy (65%), Portugal (59%) and France (59%). Opinions are evenly divided in the Czech Republic (48% versus 48%). The most significant evolutions noted for this indicator concern Belgium and Croatia, where the EU is now significantly less likely to be seen as a lever for improving the quality of life, by six and nine percentage points respectively, but also Ireland where, in contrast, this view has gained eight percentage points.

QA13.8. Please tell me to what extent you agree or disagree with each of the following statements.
The EU makes the quality of life better in Europe



Among Europeans, a majority of the younger generation (52% of 15-24 year-olds, 58% of students) and the most advantaged categories (57% of managers, 53% of those who position themselves at the top of the social scale, 53% of those who studied the longest) say that the EU improves the quality of life, while a majority in the other generations (49% of 25-39 year-olds, 53% of 40-54 year olds and the 55-plus age group) and the more disadvantaged and vulnerable sections of society (60% of those who studied the least, 59% of unemployed people, 58% of those who place themselves at the bottom of the social scale) do not share this opinion.

<u>“The EU needs a clearer message”</u>

Europeans overwhelmingly agree that the **EU needs a clearer message**. More than eight out of ten Europeans (81%, +1 percentage point since spring 2013) share this view and as many as 41% “totally agree” with it. Only 11% (-1) of respondents do not agree that the EU needs to communicate more clearly.

There is very broad support for this idea in the European Union: it is supported by an absolute majority of respondents in all Member States, with scores ranging between 90% in Cyprus and 68% in Romania. Absolute majorities even “totally agree” with the need for a clearer message for the EU in Cyprus (65%), Spain (56%), Sweden (56%), Germany (50%) and Slovenia (50%).

QA13.11. Please tell me to what extent you agree or disagree with each of the following statements.

The EU needs a clearer message

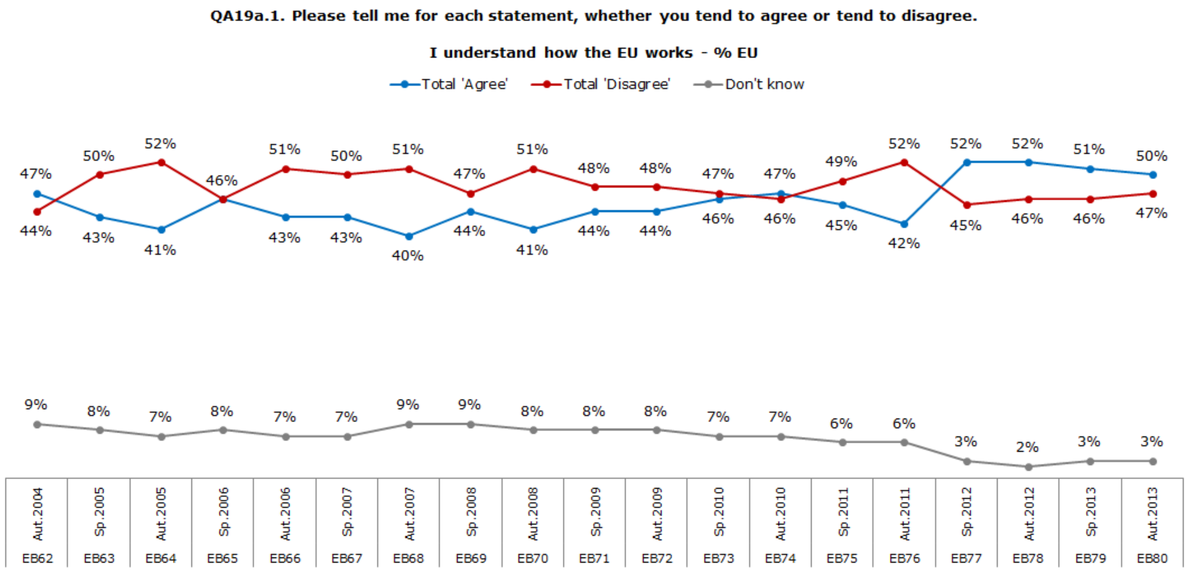
	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know	Total 'Agree'		Total 'Disagree'	
	EB80 Aut. 2013					EB80 Aut. 2013	Diff. Aut. 2013 - Sp. 2013	EB80 Aut. 2013	Diff. Aut. 2013 - Sp. 2013
EU28	41%	40%	9%	2%	8%	81%	+1	11%	-1
ES	56%	32%	5%	2%	5%	88%	+5	7%	-3
CZ	28%	52%	12%	1%	7%	80%	+4	13%	-3
FR	48%	38%	4%	2%	8%	86%	+3	6%	-1
HU	29%	51%	12%	2%	6%	80%	+2	14%	=
PT	37%	42%	12%	2%	7%	79%	+2	14%	-3
SK	38%	47%	7%	1%	7%	85%	+2	8%	-1
AT	41%	41%	11%	3%	4%	82%	+1	14%	+1
NL	49%	39%	8%	1%	3%	88%	+1	9%	=
RO	27%	41%	12%	3%	17%	68%	+1	15%	=
FI	41%	46%	8%	1%	4%	87%	+1	9%	-2
BE	36%	50%	10%	1%	3%	86%	=	11%	=
DE	50%	36%	6%	2%	6%	86%	=	8%	=
IT	27%	42%	16%	7%	8%	69%	=	23%	-1
CY	65%	25%	2%	2%	6%	90%	=	4%	=
LT	26%	43%	11%	3%	17%	69%	=	14%	-1
LU	48%	40%	8%	0%	4%	88%	=	8%	+1
SE	56%	32%	8%	2%	2%	88%	=	10%	+1
BG	27%	43%	10%	2%	18%	70%	-1	12%	+2
EE	32%	47%	10%	2%	9%	79%	-1	12%	+3
IE	36%	41%	11%	3%	9%	77%	-1	14%	+1
EL	49%	37%	8%	3%	3%	86%	-1	11%	=
LV	29%	49%	7%	2%	13%	78%	-1	9%	-1
SI	50%	34%	6%	3%	7%	84%	-1	9%	+1
UK	48%	34%	7%	1%	10%	82%	-1	8%	-2
DK	48%	36%	10%	2%	4%	84%	-2	12%	+2
MT	31%	41%	5%	1%	22%	72%	-2	6%	+1
PL	20%	50%	12%	2%	16%	70%	-2	14%	-2
HR	23%	46%	16%	4%	11%	69%	-6	20%	+4

3. KNOWLEDGE OF THE EUROPEAN UNION

3.1. Knowledge of how the European Union works

- Europeans are slightly less likely to believe that they understand how the EU works -

Half of Europeans claim that they understand how the European Union works, while 47% say they do not, and 3% express no opinion. A majority of respondents said that they understood how the European Union works at the time of the Standard Eurobarometer survey of spring 2012 (EB77) and although still in the majority, the proportion expressing this opinion has declined slightly, by one percentage point since the spring 2013 survey and by two percentage points since autumn 2012[19].



Since spring 2013, the proportion of respondents who feel that they understand how the EU works has increased and now forms a majority in Spain (50%, +5 percentage points) and Malta (50%, +6). In total, this view is predominant in 21 of the 28 Member States, the highest scores being recorded in Sweden (70%, -2), Poland (69%, +1) and Cyprus (62%, +2).

In contrast, it is now the minority opinion in Bulgaria (47%, -5 percentage points) and Greece (48%, -5). Respondents in Italy (64%, +5) and Portugal (60%, +3) are the most likely to say that they do not know how the EU works.

[19] QA19a.1 Please tell me for each statement, whether you tend to agree or tend to disagree. I understand how the EU works.

Understanding of how the EU works continues to be very strongly structured and determined by the social categories of respondents. Thus, understanding increases with terminal education age and social position. By way of illustration, almost two-thirds (64%) of those who studied up to the age of 20 or beyond and six out of ten of those who place themselves at the top of the social scale say they understand how the EU works, compared with only 30% of those who left school at the age of 15 or earlier and 38% of those who place themselves at the bottom of the social scale.

Men (57% versus 41%) are far more likely than women (43% versus 54%) to say they understand how the EU works. Age differences are less pronounced, although the oldest respondents are significantly less likely than the younger generations to understand how the EU works (44% of the 55-plus age group say that they understand how the EU works, compared with 53% of 25-39 year-olds and 40-54 year-olds, and 52% of 15-24 year-olds).

QA19a.1. Please tell me to what extent you agree or disagree with each of the following statements.

I understand how the EU works

	Total 'Agree'	Total 'Disagree'	Don't know
EU28	50%	47%	3%
Gender			
Man	57%	41%	2%
Woman	43%	54%	3%
Age			
15-24	52%	45%	3%
25-39	53%	44%	3%
40-54	53%	45%	2%
55 +	44%	53%	3%
Education (End of)			
15-	30%	68%	2%
16-19	48%	49%	3%
20+	64%	34%	2%
Still studying	55%	42%	3%
Socio-professional category			
Self-employed	59%	38%	3%
Managers	66%	31%	3%
Other white collars	54%	43%	3%
Manual workers	48%	50%	2%
House persons	33%	65%	2%
Unemployed	46%	51%	3%
Retired	44%	53%	3%
Students	55%	42%	3%
Self-positioning on the social staircase			
Low (1-4)	38%	59%	3%
Medium (5-6)	49%	49%	2%
High (7-10)	60%	37%	3%

The following table shows the results by socio-demographic criteria in the whole of the European Union (EU28) on average, in the six largest EU countries and in four countries which have been particularly badly affected by the economic crisis.

QA19a.1. Please tell me to what extent you agree or disagree with each of the following statements.
I understand how the EU works

Total 'Agree'

	EU28	DE	ES	FR	IT	PL	UK	EL	PT	IE	CY
	50%	53%	50%	43%	33%	69%	44%	48%	38%	57%	62%
Gender											
Male	57%	61%	58%	52%	38%	73%	55%	58%	44%	64%	70%
Female	43%	46%	43%	34%	30%	65%	34%	39%	32%	50%	55%
Age											
15-24	52%	45%	53%	48%	36%	78%	45%	56%	48%	54%	48%
25-39	53%	54%	64%	45%	37%	72%	42%	52%	46%	55%	66%
40-54	53%	55%	57%	42%	41%	70%	47%	51%	43%	60%	65%
55 +	44%	55%	33%	40%	26%	60%	43%	40%	26%	56%	65%
Education (End of)											
15-	30%	42%	30%	27%	15%	46%	30%	35%	26%	35%	43%
16-19	48%	50%	56%	40%	38%	66%	42%	45%	51%	50%	64%
20+	64%	69%	73%	51%	50%	76%	58%	63%	63%	73%	75%
Still studying	55%	54%	65%	49%	39%	75%	49%	56%	44%	60%	54%
Socio-professional category											
Self-employed	59%	71%	67%	57%	46%	72%	50%	54%	63%	62%	60%
Managers	66%	63%	78%	58%	51%	80%	60%	67%	74%	72%	82%
Other white collars	54%	47%	72%	31%	44%	76%	53%	60%	51%	64%	73%
Manual workers	48%	50%	58%	41%	32%	72%	33%	47%	44%	55%	63%
House persons	33%	50%	26%	27%	17%	61%	20%	24%	26%	44%	50%
Unemployed	46%	43%	48%	47%	34%	66%	44%	47%	27%	52%	57%
Retired	44%	52%	34%	38%	24%	59%	40%	47%	23%	55%	64%
Students	55%	54%	65%	49%	39%	75%	49%	56%	44%	60%	54%

3.2. Objective knowledge of the European Union

- Almost four out of ten Europeans do not know that the EU now has 28 Member States -

After measuring subjective knowledge, this Eurobarometer survey attempted to quantify objective knowledge of the European Union. Respondents were therefore asked to say whether three statements ("the EU currently consists of 28 Member States"; "the Members of the European Parliament are directly elected by the citizens of each Member State"; "Switzerland is a member of the EU") were true or false.

For the European Union as a whole, the average percentage of right answers was 62%, with the highest scores in Croatia (80%), Austria (77%), Malta (76%), Slovakia (74%), Slovenia (74%), Greece (73%) and Bulgaria (73%). The lowest scores were recorded in the United Kingdom (51%) and Spain (55%).

In the candidate countries, the average percentage of right answers exceeds 50% in the Former Yugoslav Republic of Macedonia (59%), Montenegro (58%), Serbia (58%) and Iceland (51%), but has fallen to 33% in Turkey.

In detail:

Whereas in spring 2013, 69% of Europeans knew that the EU was composed of 27 Member States, 62% are aware that it now has 28 Member States. **Many respondents, therefore, appear to have forgotten the accession of Croatia to the European Union,** which now has 28 members. With the exception of Croatia (+2 percentage points), Lithuania (+1), Finland (+1), Austria (unchanged), the Netherlands (=) and Slovakia (=), awareness of the number of EU Member States has declined in all countries, most notably in Luxembourg (-16), Portugal (-15), France (-12), Greece (-11) and Sweden (-10).

With 71% of correct answers (unchanged since spring 2013), the fact that **Switzerland is not a member of the EU,** remains the question on which Europeans are best-informed. An absolute majority of respondents in the 28 EU countries are aware that Switzerland is not a member of the EU[20].

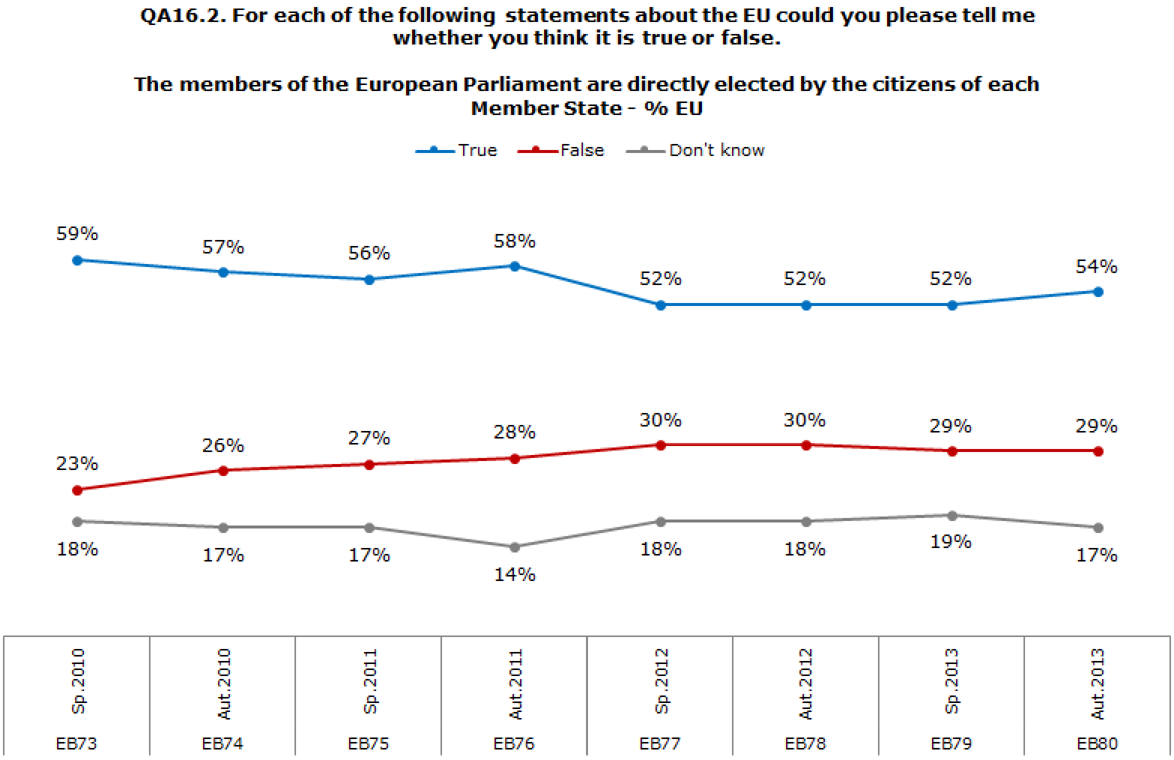
[20] QA16. For each of the following statements about the European Union could you please tell me whether you think it is true or false.

QA16. For each of the following statements about the EU could you please tell me whether you think it is true or false.

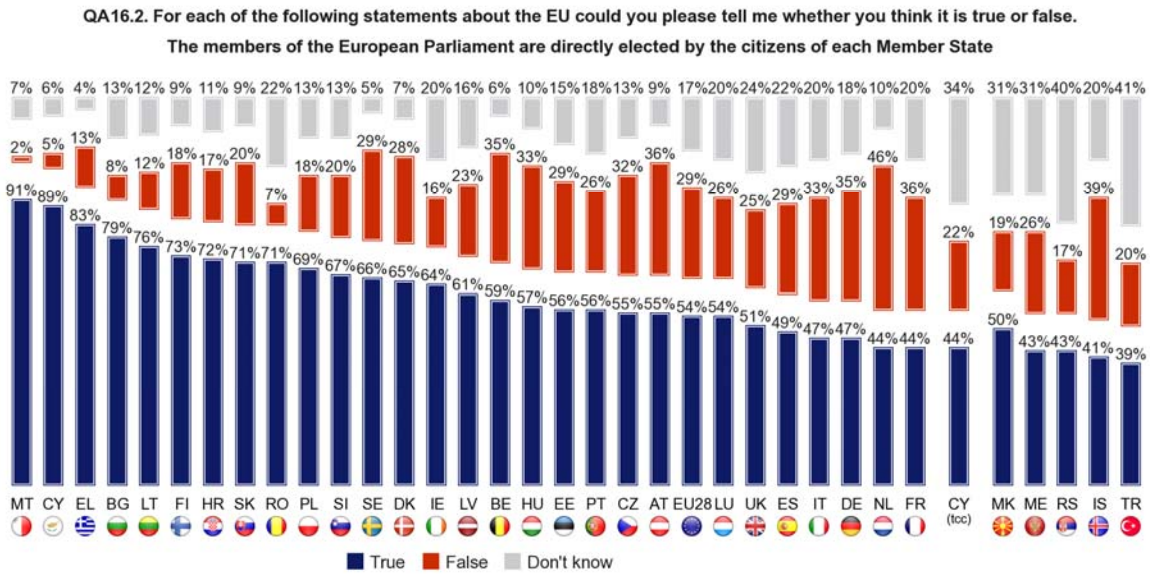
Correct answers

	The EU currently consists of 28 Member States		The members of the European Parliament are directly elected by the citizens of each Member State		Switzerland is a member of the EU	
	True	Diff. Aut. 2013 - Sp. 2013	True	Diff. Aut. 2013 - Sp. 2013	False	Diff. Aut. 2013 - Sp. 2013
EU28	62%	-7	54%	+2	71%	=
BE	72%	-5	59%	-2	82%	+3
BG	78%	-3	79%	+4	62%	+4
CZ	74%	-6	55%	+3	70%	-2
DK	71%	-3	65%	-3	73%	-2
DE	60%	-9	47%	+3	87%	=
EE	64%	-6	56%	+4	59%	-2
IE	63%	-8	64%	=	54%	-4
EL	71%	-11	83%	+2	67%	=
ES	56%	-6	49%	+7	58%	+2
FR	62%	-12	44%	+3	82%	+1
HR	85%	+2	72%	-6	84%	+2
IT	61%	-5	47%	+3	76%	-3
CY	68%	-6	89%	+6	51%	+1
LV	63%	-2	61%	-2	57%	+4
LT	69%	+1	76%	+5	54%	-7
LU	69%	-16	54%	-4	92%	+3
HU	75%	-3	57%	=	68%	+1
MT	69%	-1	91%	+5	69%	+2
AT	85%	=	55%	+5	93%	=
NL	60%	=	44%	=	84%	=
PL	73%	-2	69%	-3	60%	-4
PT	58%	-15	56%	+1	67%	+1
RO	69%	-4	71%	+4	51%	+4
SI	74%	-2	67%	-2	83%	+1
SK	82%	=	71%	+4	69%	+3
FI	65%	+1	73%	+6	68%	-2
SE	60%	-10	66%	+7	76%	-2
UK	45%	-8	51%	-4	56%	-4
CY (tcc)	60%	-13	44%	-1	46%	+1
MK	56%	-8	50%	-8	70%	-3
IS	46%	-9	41%	-8	66%	-7
ME	67%	-11	43%	-12	65%	=
RS	64%	-4	43%	-3	67%	+5
TR	40%	-10	39%	-5	19%	-3

There has been a slight rise in the number of respondents correctly answering the question on how MEPs are elected. Whereas this result had been stable since spring 2012 (EB77), it has improved a little ahead of the forthcoming European elections, which will be held in May 2014. An absolute majority of Europeans (54%, +2 percentage points since spring 2013) know that **MEPs are elected directly by the citizens of each Member State**, while 29% (unchanged) gave the wrong answer and 17% (-2) said that they did not know.



The Netherlands is the only country where there are more wrong (46%) than right answers (44%). Everywhere else, a majority of respondents gave the right answer regarding the election of MEPs, with the highest scores in Malta (91%), Cyprus (89%), Greece (83%) and Bulgaria (79%). The lowest scores were recorded in France (44% versus 36%), Italy (47% versus 33%) and Germany (47% versus 35%). Knowledge on this question has increased sharply since spring 2013 in Spain (+7 percentage points), Sweden (+7), Finland (+6) and Cyprus (+6), but has declined fallen significantly in Croatia (-6) (it should be borne in mind that the spring 2013 survey was carried out in May 2013, just a few weeks after the first European elections in Croatia on 14 April 2013).



4. Democracy in the European Union

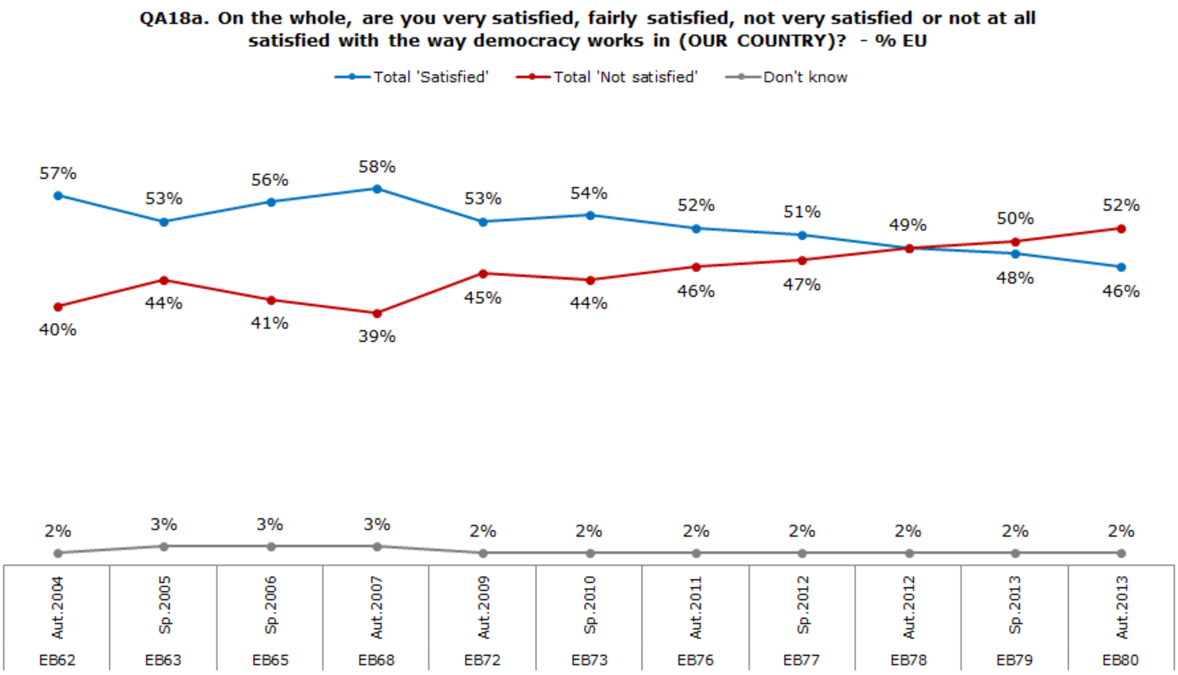
4.1. The way in which democracy works

The way in which democracy works at national level

The deteriorating trend in perceptions of the way national democracies work, which started in the spring 2010 Eurobarometer, has continued with this survey. For the second consecutive time for this indicator, criticisms outweigh favourable opinions. The satisfaction index for the way in which democracy works at national level is -6, the lowest level ever recorded in the Standard Eurobarometer surveys.

More than half of Europeans (52%, +2 percentage points since spring 2013) are dissatisfied with the way in which democracy works in their country, while 46% (-2) are satisfied[21].

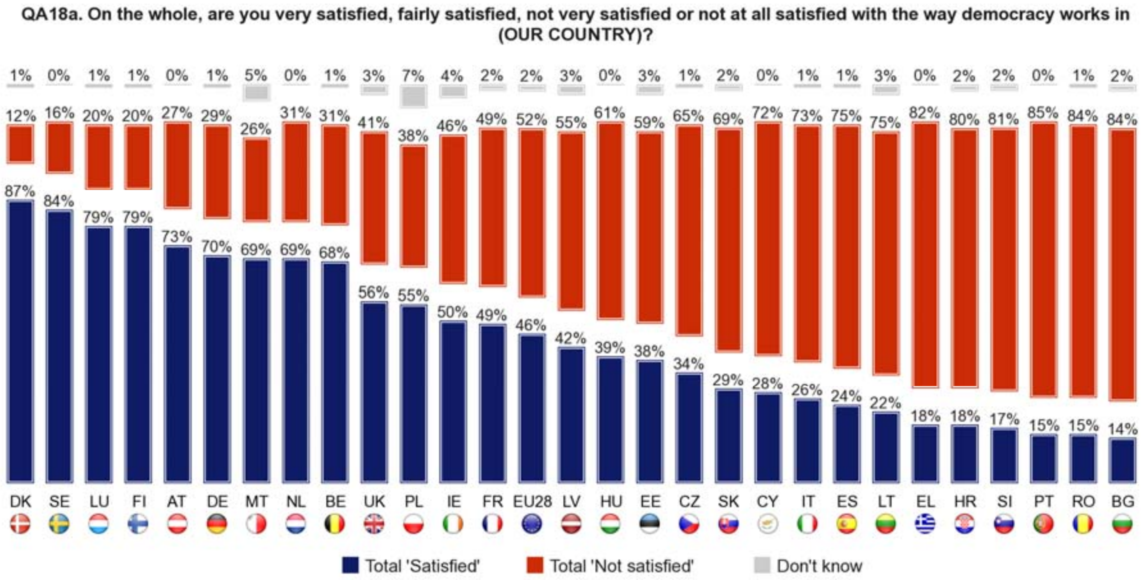
[21] QA18a. On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in (OUR COUNTRY)?



The opinion ratio has deteriorated slightly in the euro area countries (46% versus 53%, compared with 49% versus 50% in spring 2013). It remains negative, without any major changes, in the non-euro area countries (47% versus 50%). A national analysis of the results shows that a majority of respondents are satisfied in 12 Member States: the Nordic countries (87% in Denmark, +1 percentage point; 84% in Sweden, +3; 79% in Finland, +5), the Benelux countries (79% in Luxembourg, -1; 69% in the Netherlands, -6; 68% in Belgium, -1), Austria (73%, -1), Germany (70%, -2), Malta (69%, -2), the United Kingdom (56%, +1), Poland (55%, +8) and Ireland (50%, unchanged, versus 46%, -1). Within this group, there is an 8-point increase in satisfaction in Poland, reversing the opinion ratio, which is now positive.

The opinion ratio has deteriorated sharply in France, where respondents are evenly divided (49% versus 49%), whereas a majority were satisfied in spring 2013 (55% versus 42%).

Respondents are predominantly dissatisfied in 15 EU countries, most notably in Portugal (85%, unchanged), Bulgaria (84%, +1 percentage point), Romania (84%, +4), Greece (82%, -3), Slovenia (81%, +2), Croatia (80%, +2), Lithuania (75%, +3) and Spain (75%, =). There have been two significant changes within this group: dissatisfaction has decreased in Hungary (61%, -7 percentage points), but has increased in Cyprus (72%, +7). Nonetheless, the vast majority of respondents in these two countries remain dissatisfied.



There are strong structural and social divisions in perceptions of the way in which national democracies work. Thus, those who studied the longest and belong to the most advantaged sections of society are more likely to be positive, while those who left school the earliest and belong to the most modest and vulnerable categories are more negative. By way of illustration:

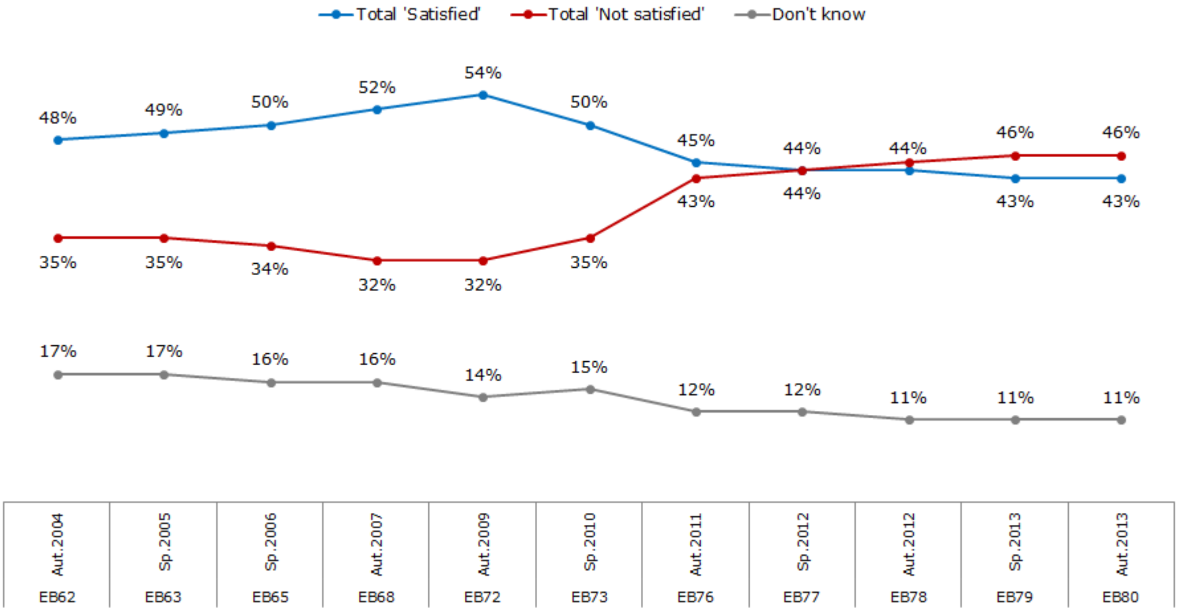
- 64% of managers, 56% of those who almost never have difficulties paying their bills and 55% of those who stayed the longest in full-time education are satisfied with the way in which democracy works in their country;

- In contrast, 75% of those who struggle to pay their bills most of the time, 67% of unemployed people and 58% of those who left school at the age of 15 or earlier are dissatisfied with the way in which democracy works in their country.

The way in which democracy works in the European Union

Opinions on the way in which European democracy works are unchanged since spring 2013: 46% of Europeans (unchanged) are dissatisfied with the way in which democracy works in the EU, while 43% (=) are satisfied[22].

QA18b. On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in the EU? - % EU



Without any major evolutions, the opinion ratio remains unfavourable, as it was in spring 2013, in the euro area countries (51% versus 40%). For the second consecutive time, at least 50% of respondents in this group of countries are dissatisfied.

However, it continues to be favourable and has even improved slightly in the non-euro area countries (50% versus 35%, compared with 48% versus 37% in spring 2013).

In this survey, the opinion ratio has been reversed in three countries since spring 2013: positively in Sweden (50% versus 43%, compared with 46% versus 48%) and negatively in the Netherlands (43% versus 50%, compared with 49% versus 44%) and France (41% versus 47%, compared with 44% versus 43%).

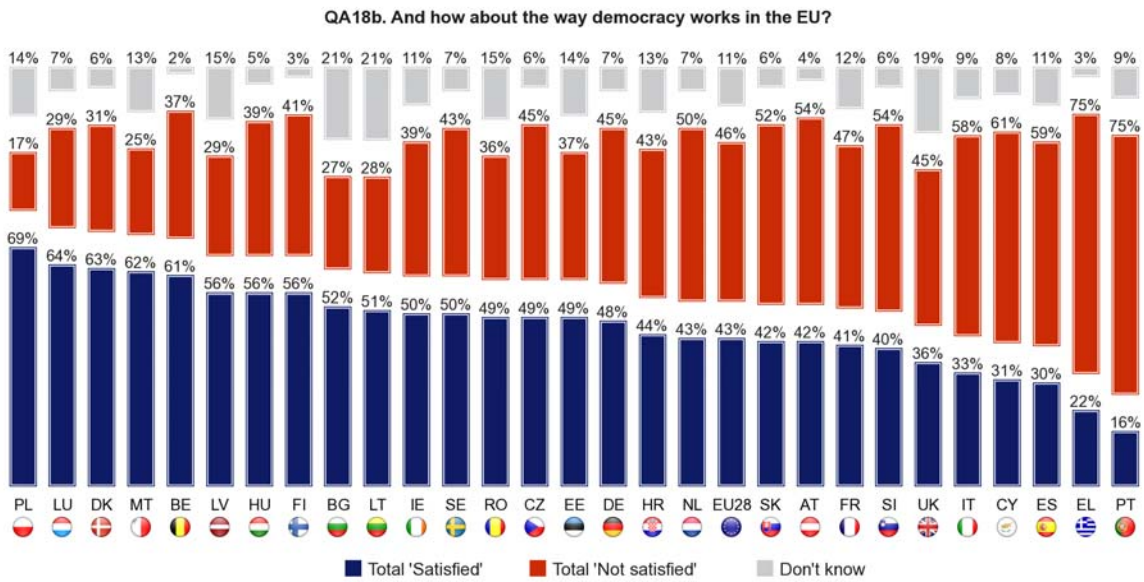
[22] QA18b. And the way in which democracy works in the European Union?

A majority of respondents in 17 Member States are satisfied with the way in which democracy works in the EU.

Satisfaction is strongest in Poland (69%, +3 percentage points), Luxembourg (64%, +2), Denmark (63%, -1), Malta (62%, +4) and Belgium (61%, -2).

Opinions are more divided in the Czech Republic (49%, +2, versus 45%, unchanged) and Germany (48%, =, versus 45%, -1) and Croatia (44%, -1, versus 43%, +2). Within this group of countries, satisfaction has increased markedly in Finland (56%, +6) and Hungary (56%, +5); in contrast, it has fallen significantly in Bulgaria (52%, -6).

A majority of respondents in 11 Member States are dissatisfied with the way in which democracy works in the EU, with an absolute majority in Greece (75%, -1 percentage point), Portugal (75%, unchanged), Cyprus (61%, -9), Spain (59%, =), Italy (58%, +5), Austria (54%, +3), Slovenia (54%, +3), Slovakia (52%, +4) and the Netherlands (50%, +6), and a relative majority in the United Kingdom (45%, -4, versus 36%, +3) and France (47%, +4, versus 41%, -3).



A majority of 15-24 year-olds, students, those who studied the longest and those who almost never have difficulties paying their bills are satisfied with the way in which European democracy works. In all the other categories, respondents are predominantly dissatisfied.

QA18. On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in...?

	(OUR COUNTRY)		The European Union	
	Total 'Satisfied'	Total 'Not satisfied'	Total 'Satisfied'	Total 'Not satisfied'
EU28	46%	52%	43%	46%
EURO AREA	46%	53%	40%	51%
NON-EURO AREA	47%	50%	50%	35%
Gender				
Man	47%	52%	44%	48%
Woman	46%	52%	42%	45%
Age				
15-24	48%	49%	53%	37%
25-39	45%	53%	45%	46%
40-54	46%	52%	42%	49%
55 +	47%	51%	38%	48%
Education (End of)				
15-	39%	58%	32%	52%
16-19	42%	56%	41%	48%
20+	55%	44%	49%	44%
Still studying	52%	45%	57%	33%
Socio-professional category				
Self-employed	45%	53%	41%	50%
Managers	64%	35%	54%	40%
Other white collars	46%	52%	48%	44%
Manual workers	44%	54%	41%	48%
House persons	38%	59%	36%	49%
Unemployed	31%	67%	38%	52%
Retired	48%	50%	39%	48%
Students	52%	45%	57%	33%
Difficulties paying bills				
Most of the time	23%	75%	27%	61%
From time to time	38%	60%	41%	48%
Almost never/ Never	56%	42%	49%	41%

The following tables show the results by socio-demographic criteria in the whole of the European Union (EU28) on average, in the six largest EU countries and in four countries which have been particularly badly affected by the economic crisis.

QA18a. On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works in (OUR COUNTRY)?

- Total 'Satisfied'

	EU28	DE	ES	FR	IT	PL	UK	EL	PT	IE	CY
	46%	70%	24%	49%	26%	55%	56%	18%	15%	50%	28%
Gender											
Male	47%	72%	22%	53%	25%	52%	58%	22%	15%	52%	31%
Female	46%	68%	27%	43%	27%	56%	53%	14%	14%	49%	25%
Age											
15-24	48%	68%	18%	54%	28%	61%	51%	27%	16%	54%	27%
25-39	45%	76%	20%	50%	22%	59%	52%	15%	18%	49%	27%
40-54	46%	66%	28%	45%	27%	56%	54%	15%	14%	50%	23%
55 +	47%	70%	29%	46%	28%	46%	61%	18%	12%	50%	34%
Education (End of)											
15-	39%	71%	25%	37%	25%	42%	51%	14%	11%	38%	20%
16-19	42%	64%	24%	41%	24%	50%	53%	16%	17%	44%	30%
20+	55%	75%	25%	57%	28%	61%	62%	19%	23%	61%	27%
Still studying	52%	79%	17%	64%	28%	60%	64%	30%	14%	61%	38%
Socio-professional category											
Self-employed	45%	70%	30%	57%	22%	60%	60%	19%	19%	55%	18%
Managers	64%	79%	33%	67%	30%	65%	62%	0%	31%	60%	21%
Other white collars	46%	73%	21%	41%	26%	61%	53%	18%	14%	52%	27%
Manual workers	44%	66%	22%	44%	24%	59%	52%	16%	16%	51%	25%
House persons	38%	66%	37%	22%	27%	61%	51%	16%	12%	44%	25%
Unemployed	31%	54%	19%	41%	22%	37%	38%	12%	9%	38%	23%
Retired	48%	68%	28%	47%	31%	46%	61%	21%	12%	51%	38%
Students	52%	79%	17%	64%	28%	60%	64%	30%	14%	61%	38%

QA18b. And how about the way democracy works in the EU?

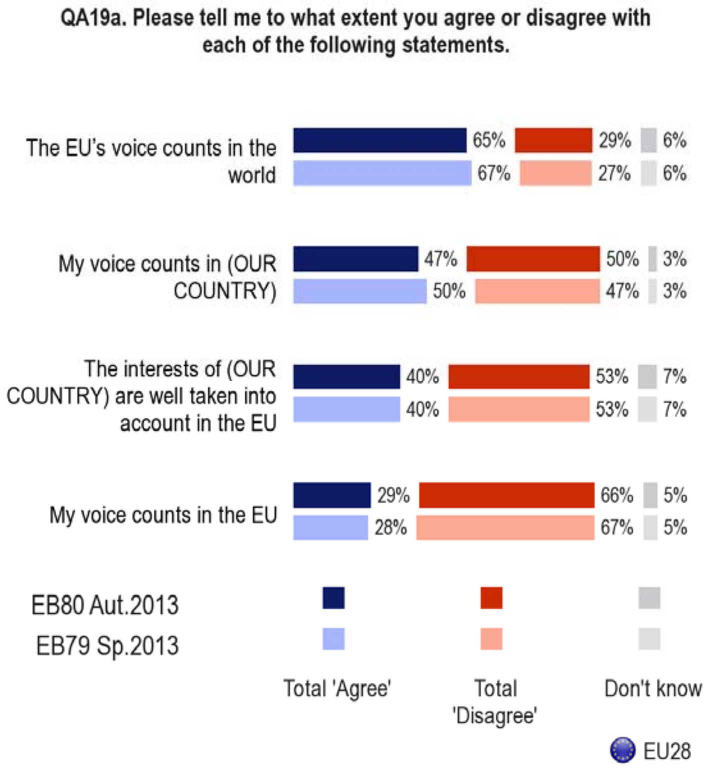
- Total 'Satisfied'

	EU28	DE	ES	FR	IT	PL	UK	EL	PT	IE	CY
	43%	48%	30%	41%	33%	69%	36%	22%	16%	50%	31%
Gender											
Male	44%	49%	29%	46%	31%	70%	37%	25%	19%	52%	38%
Female	42%	47%	31%	36%	35%	67%	34%	21%	13%	50%	26%
Age											
15-24	53%	57%	34%	55%	39%	76%	51%	30%	21%	58%	38%
25-39	45%	52%	30%	41%	33%	73%	36%	22%	21%	50%	31%
40-54	42%	46%	35%	38%	35%	70%	34%	20%	15%	49%	22%
55 +	38%	44%	26%	37%	29%	61%	29%	21%	11%	49%	35%
Education (End of)											
15-	32%	49%	24%	29%	26%	51%	26%	18%	11%	35%	22%
16-19	41%	43%	32%	35%	34%	66%	34%	19%	21%	42%	29%
20+	49%	51%	38%	48%	34%	76%	43%	29%	23%	62%	34%
Still studying	57%	61%	35%	58%	42%	76%	59%	30%	23%	69%	44%
Socio-professional category											
Self-employed	41%	54%	33%	43%	26%	62%	35%	26%	20%	52%	18%
Managers	54%	57%	57%	56%	35%	71%	42%	18%	35%	64%	39%
Other white collars	48%	55%	43%	32%	39%	73%	41%	22%	20%	57%	23%
Manual workers	41%	42%	26%	39%	33%	74%	28%	19%	18%	48%	31%
House persons	36%	46%	22%	25%	30%	70%	37%	18%	14%	41%	14%
Unemployed	38%	41%	29%	40%	28%	67%	38%	18%	10%	40%	31%
Retired	39%	42%	28%	36%	30%	62%	27%	26%	10%	49%	39%
Students	57%	61%	35%	58%	42%	76%	59%	30%	23%	69%	44%

4.2. Are personal, national and European interests properly taken into account by the EU?

<u>The impression that “my voice counts in (OUR COUNTRY)”</u>

Since the autumn 2012 survey (EB78), when this question was last asked, the opinion ratio has been reversed and is now negative on this indicator measuring the influence which citizens have within their own country. Half of Europeans (50%, +3 percentage points since autumn 2012) now have the impression that **their voice does not count in their country,** while 47% (-3) take the opposite view[23].



The item “My voice counts in (OUR COUNTRY)” is compared with EB78 survey of August 2012

There are significant national differences which broadly overlap with those analysed with regard to the way in which national democracy works. The impression that “my voice counts in my country” is widely shared in the Member States where respondents are the most satisfied with the national democratic system: the Nordic countries (93% of respondents in Denmark feel that their voice counts, 91% in Sweden and 78% in Finland), the Benelux countries (76% in the Netherlands, 66% in Belgium and 60% in Luxembourg), Austria (72%) and Germany (72%).

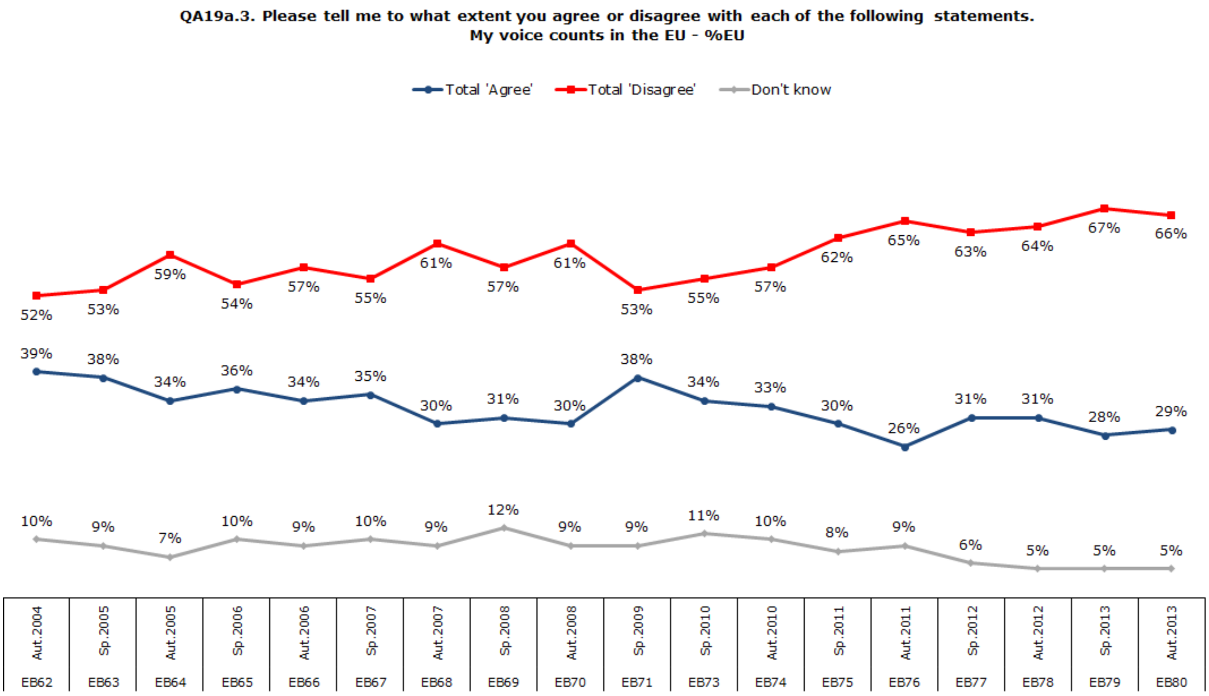
[23] QA19a4. Please tell me to what extent you agree or disagree with each of the following statements. My voice counts in (OUR COUNTRY).

Correspondingly, the respondents the most likely to think that their voice does not count are those who are the most critical of the way in which democracy works in their country: in Greece (80%), Italy (79%), Cyprus (77%), Spain (76%), Lithuania (76%), Romania (74%) and Portugal (66%) for example.

The proportion of respondents who feel that their voice counts in their country has risen very significantly in Malta where the opinion ratio is now very positive (64% versus 32%, compared with 46% versus 46% in autumn 2012), but has declined sharply in Slovenia (now 42% versus 56%, compared with 59% versus 39% in autumn 2012) and Estonia (36% versus 62%, compared with 51% versus 48%), where the opinion ratio has now been reversed and is negative.

The impression that "my voice counts in the European Union"

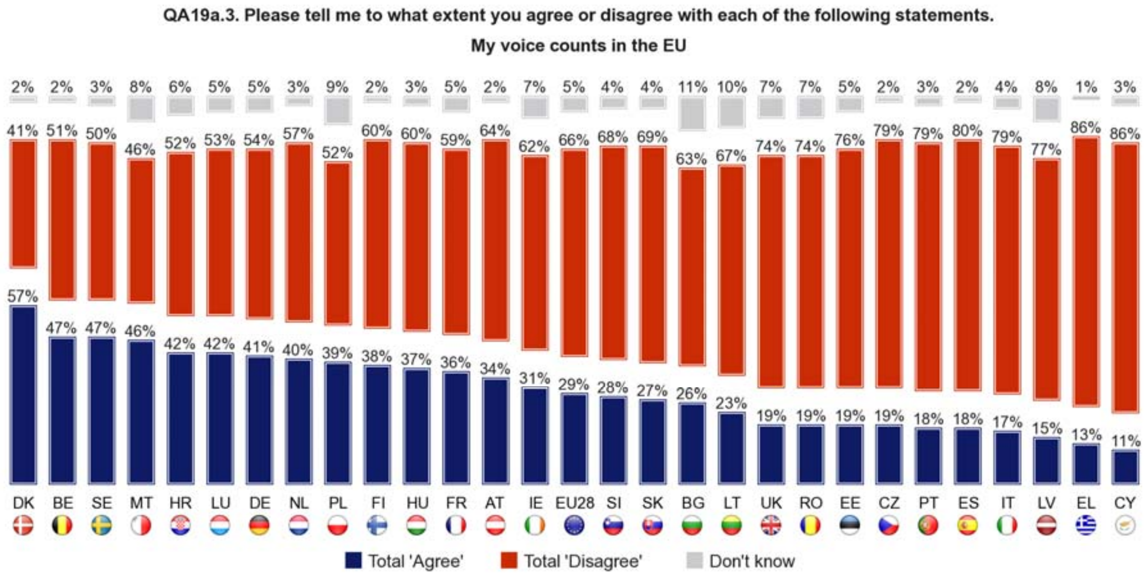
Two-thirds of Europeans (66%, -1 percentage point since spring 2013) say that **their voice does not count in the EU**, while only 29% (+1) feel that their voice counts and 5% (unchanged) expressed no opinion[24].



This view is shared by an absolute majority of respondents in 26 of the 28 Member States, most notably in Greece (86%, -3 percentage points), Cyprus (86%, -3), Spain (80%, +3), Portugal (79%, -2), the Czech Republic (79%, -2), Italy (79%, +1), Latvia (77%, +2) and Estonia (76%, -1). The two exceptions are Denmark, where an absolute majority of respondents consider that their voice counts in the EU (57%, +1), and Malta, where opinions are evenly balanced (46%, +1, versus 46%, +3).

[24] QA19a3. Please tell me to what extent you agree or disagree with each of the following statements. My voice counts in the EU.

The proportion of respondents who feel that their voice as an EU citizen counts has increased the most in Sweden (47%, +6), Ireland (31%, +5), Finland (38%, +5) and Germany (41%, +5). In contrast, it has fallen sharply in Croatia (42%, -6).



National interests are properly taken into account in the European Union

A majority of Europeans also consider that their country's interests are not properly taken into account by the EU, with scores that are unchanged since spring 2013[25] (53% versus 40%, with a "DK" rate of 7%). This opinion is shared, without any major differences, across all groups of countries.

Since the spring 2013 Eurobarometer survey, the opinion ratio has been reversed, unfavourably in Malta (42% versus 47%, compared with 53% versus 34%), but favourably in Ireland (48% versus 44%, compared with 44% versus 51%) and Sweden (51% versus 45%, compared with 48% versus 49%).

A majority of respondents in eight countries feel that their country's interests are properly taken into account by the EU, compared with seven in the spring 2013 survey 2013: in addition to Ireland and Sweden, this view is predominant in Luxembourg (67%, +1 percentage point), Germany (61%, +3), Belgium (61%, +3), Denmark (55%, +1), Poland (51%, +5) and Lithuania (48%, -2, versus 46%, +1). The proportion of respondents who feel that national interests are properly taken into account by the EU has increased the most significantly in Poland.

In the other EU Member States, a majority of respondents are convinced that national interests are not adequately taken into account by the EU.

[25] QA19a2. Please tell me to what extent you agree or disagree with each of the following statements. The interests of (OUR COUNTRY) are well taken into account in the EU.

This view is supported by an overwhelming majority in Cyprus (85%, -1 percentage point), Greece (83%, -2), Italy (71%, +4), Latvia (68%, -1), Slovenia (66%, +1) and Portugal (65%, +1). It has gained the most ground in Malta (47%, +13) and France (50%, +5), but has lost ground in Romania (55%, -5).

The EU's voice counts in the world

Lastly, and as in all the previous surveys, there is a broad consensus among Europeans about the European Union's influence on the world stage**. Almost two-thirds of Europeans** (65%, -2 percentage points since spring 2013) **agree that "the EU's voice counts in the world"**, while 29% (+2) disagree and 6% (unchanged) did not express an opinion[26].

Following an 8-point fall in the proportion of respondents believing that the EU's voice counts in the world, the balance of opinion is now negative in **Italy** (42% versus 51%), whereas it was positive in spring 2013 (50% versus 45%). In all the other Member States, absolute majorities of respondents believe that the EU's voice counts in the world, with the highest scores in the Nordic countries (85% in Denmark, 84% in Sweden and 78% in Finland), the Baltic States (82% in Estonia, 81% in Latvia and 71% in Lithuania) and the Benelux countries (78% in Luxembourg, 74% in the Netherlands and 73% in Belgium), as well as in Malta (76%) and Hungary (75%).

[26] QA19a5. Please tell me to what extent you agree or disagree with each of the following statements. The EU's voice counts in the world.

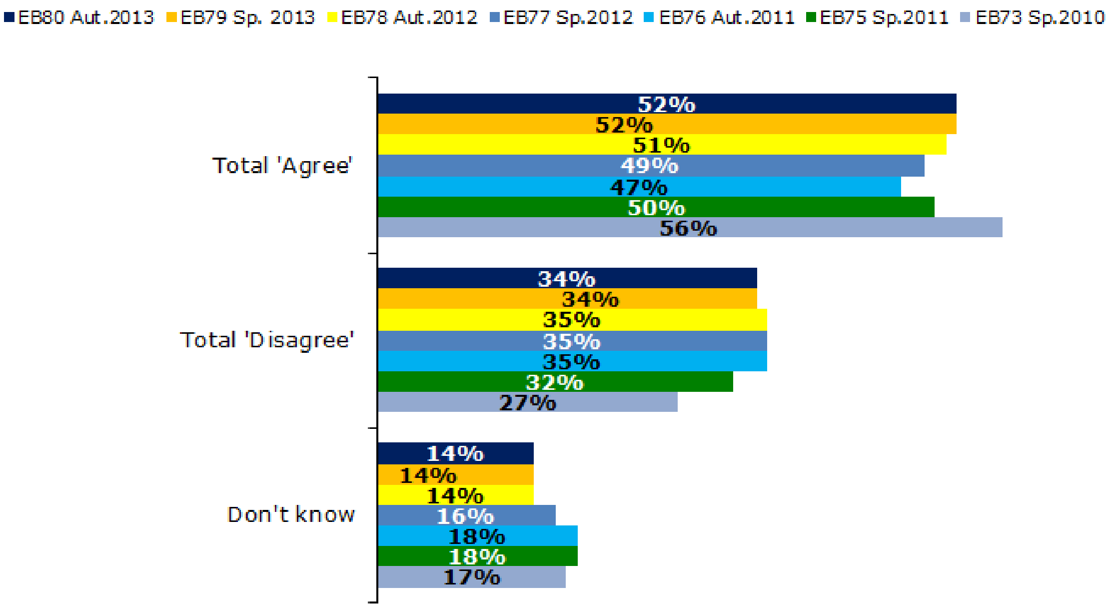
5. EUROPEANS AND GLOBALISATION

5.1. Is globalisation an opportunity for economic growth?

- An absolute majority of Europeans continue to see globalisation as an economic opportunity -

Just over half of Europeans (52%, unchanged since spring 2013) agree that "globalisation is an opportunity for economic growth", while 34% (=) disagree and 14% (=) expressed no opinion[27].

QA19a.6. Please tell me to what extent you agree or disagree with each of the following statements. Globalisation is an opportunity for economic growth -%EU



A majority of respondents consider that globalisation plays a positive role, without any significant changes since the previous survey. This opinion is slightly more widespread in the non-euro area countries (53% versus 28%) than in the euro area countries (50% versus 38%).

In this survey, the opinion ratio on the economic dimension of globalisation has been reversed positively in Portugal (43% versus 36%, compared with 39% versus 41% in spring 2013), but negatively in France (44% versus 46%, compared with 46% versus 43%).

[27] QA19a.6 Please tell me for each statement, whether you tend to agree or tend to disagree. Globalisation is an opportunity for economic growth.

In total, the **positive image of globalisation as a driver of growth is predominant in 23 Member States and is even supported by an absolute majority of respondents in 18 of them.** As in the previous surveys, support is strongest in the Nordic countries (80% in Sweden, 79% in Denmark and 73% in Finland), the Netherlands (71%) and Germany (69%). The opinion ratio has narrowed in Slovakia (49% versus 39%), Spain (44% versus 35%), Portugal (43% versus 36%) and Romania (39% versus 35%, with a high "DK" rate of 26%).

A majority of respondents thus do not regard globalisation as an opportunity for economic growth in five EU countries, namely Greece (69%, +6 percentage points), Cyprus (57%, -2), Italy (56%, +8), where the negative representation of the role of globalisation has gained the most ground, the Czech Republic (47%, -2, versus 43%, +2) and France (46%, +3, versus 44%, -2).

In the **candidate countries**:

- Globalisation is seen as an opportunity for economic growth by a majority of respondents in Iceland (67%, +1 percentage point, versus 20%, -4), but also, to a lesser degree, in Turkey (54%, -1, versus 34%, +9) and the Former Yugoslav Republic of Macedonia (45%, -7, versus 28%, unchanged).

- The opposite view is predominant in Montenegro (38%, -3 percentage points, versus 42%, +9) and Serbia (35%, -4, versus 43%, +2).

QA19a.6. Please tell me to what extent you agree or disagree with each of the following statements.

Globalisation is an opportunity for economic growth

	Total 'Agree'		Total 'Disagree'		Don't know	
	EB80 Aut. 2013	Diff. Aut. 2013 - Sp. 2013	EB80 Aut. 2013	Diff. Aut. 2013 - Sp. 2013	EB80 Aut. 2013	Diff. Aut. 2013 - Sp. 2013
EU28	52%	=	34%	=	14%	=
EURO AREA	50%	-2	38%	+2	12%	=
NON-EURO AREA	53%	=	28%	=	19%	+1
SE	80%	+2	16%	-2	4%	=
DK	79%	-1	13%	-1	8%	+2
FI	73%	+5	21%	-4	6%	-1
NL	71%	=	21%	-1	8%	+1
DE	69%	=	21%	-2	10%	+2
IE	62%	+2	22%	-3	16%	+1
LU	60%	-1	30%	=	10%	+1
MT	60%	-2	15%	+2	25%	=
BE	59%	+1	37%	+1	4%	-2
HU	59%	=	30%	+2	11%	-2
EE	57%	+3	29%	-1	14%	-2
HR	57%	-5	34%	+4	9%	+1
LV	56%	-3	28%	+3	16%	=
UK	54%	-1	28%	-1	18%	+2
LT	53%	-1	22%	=	25%	+1
AT	53%	-1	39%	+1	8%	=
PL	52%	-1	24%	-1	24%	+2
SI	52%	-1	37%	-2	11%	+3
SK	49%	=	39%	+2	12%	-2
BG	46%	-3	28%	+6	26%	-3
ES	44%	+3	35%	+2	21%	-5
FR	44%	-2	46%	+3	10%	-1
CZ	43%	+2	47%	-2	10%	=
PT	43%	+4	36%	-5	21%	+1
RO	39%	+1	35%	+2	26%	-3
IT	32%	-9	56%	+8	12%	+1
CY	32%	+1	57%	-2	11%	+1
EL	27%	-4	69%	+6	4%	-2
CY (tcc)	48%	-3	32%	-3	20%	+6
IS	67%	+1	20%	-4	13%	+3
TR	54%	-1	34%	+9	12%	-8
MK	45%	-7	28%	=	27%	+7
ME	38%	-3	42%	+9	20%	-6
RS	35%	-4	43%	+2	22%	+2

A socio-demographic analysis reveals some differences between categories of Europeans: people with financial difficulties (48% versus 34%), those who place themselves at the bottom of the social scale (41% versus 38%) and those who left school at the age of 15 or earlier (39% versus 36%) are the only categories in which a majority of respondents do not share the positive perception of globalisation as an opportunity for economic growth. Positive perceptions decrease in line with age (from 58% among 15-24 year-olds to 45% in the 55-plus age group), but a majority of respondents in all age groups are positive.

QA19a.6. Please tell me to what extent you agree or disagree with each of the following statements.

Globalisation is an opportunity for economic growth

	Total 'Agree'	Total 'Disagree'	Don't know
EU28	52%	34%	14%
EURO AREA	50%	38%	12%
NON-EURO AREA	53%	28%	19%
Gender			
Man	55%	35%	10%
Woman	48%	34%	18%
Age			
15-24	58%	26%	16%
25-39	55%	34%	11%
40-54	53%	36%	11%
55 +	45%	37%	18%
Education (End of)			
15-	36%	39%	25%
16-19	51%	36%	13%
20+	60%	32%	8%
Still studying	65%	22%	13%
Socio-professional category			
Self-employed	56%	35%	9%
Managers	68%	26%	6%
Other white collars	57%	34%	9%
Manual workers	50%	36%	14%
House persons	39%	38%	23%
Unemployed	43%	40%	17%
Retired	45%	36%	19%
Students	65%	22%	13%
Difficulties paying bills			
Most of the time	34%	48%	18%
From time to time	46%	39%	15%
Almost never/ Never	59%	29%	12%
Self-positioning on the social staircase			
Low (1-4)	38%	41%	21%
Medium (5-6)	52%	35%	13%
High (7-10)	63%	28%	9%

The following table shows the results by socio-demographic criteria in the whole of the European Union (EU28) on average, in the six largest EU countries and in four countries which have been particularly badly affected by the economic crisis.

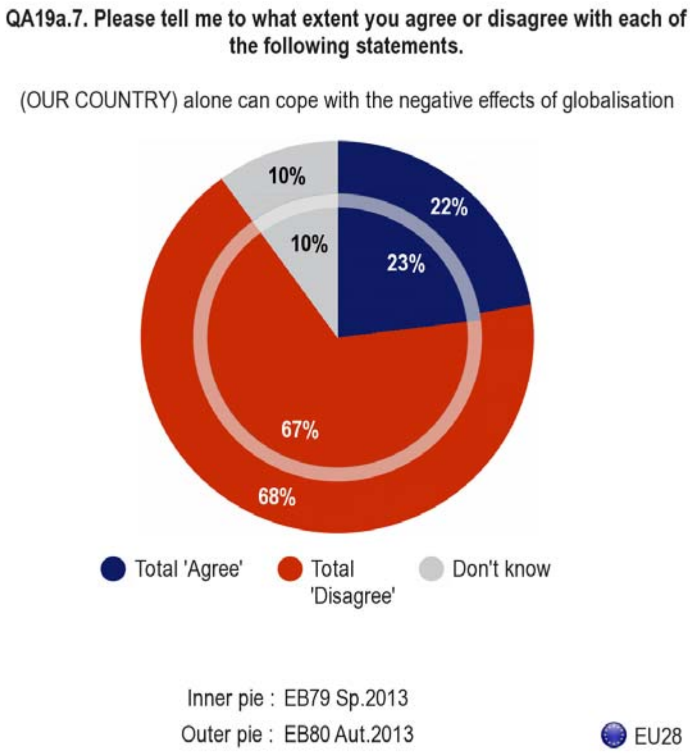
QA19a.6. Please tell me to what extent you agree or disagree with each of the following statements.

Globalisation is an opportunity for economic growth - Total 'Agree'

	EU28	DE	ES	FR	IT	PL	UK	EL	PT	IE	CY
	52%	69%	44%	44%	32%	52%	54%	27%	43%	62%	32%
Gender											
Male	55%	74%	47%	50%	34%	51%	62%	28%	50%	63%	35%
Female	48%	65%	43%	38%	31%	51%	48%	26%	37%	60%	29%
Age											
15-24	58%	66%	53%	59%	36%	60%	60%	40%	57%	62%	44%
25-39	55%	75%	48%	50%	31%	55%	60%	32%	54%	61%	39%
40-54	53%	71%	51%	38%	36%	54%	58%	27%	41%	68%	23%
55 +	45%	66%	35%	38%	31%	40%	45%	17%	34%	56%	25%
Education (End of)											
15-	36%	56%	36%	37%	20%	27%	38%	17%	31%	46%	16%
16-19	51%	70%	45%	39%	36%	47%	53%	26%	55%	57%	28%
20+	60%	75%	52%	47%	42%	56%	67%	32%	61%	70%	41%
Still studying	65%	73%	67%	68%	42%	69%	68%	42%	67%	72%	45%
Socio-professional category											
Self-employed	56%	83%	57%	48%	38%	53%	65%	34%	47%	70%	21%
Managers	68%	77%	63%	58%	51%	60%	69%	42%	66%	67%	47%
Other white collars	57%	68%	51%	39%	47%	57%	62%	28%	59%	77%	34%
Manual workers	50%	69%	44%	42%	24%	54%	54%	19%	49%	59%	40%
House persons	39%	62%	34%	35%	22%	55%	29%	30%	35%	53%	17%
Unemployed	43%	64%	43%	37%	17%	36%	51%	24%	37%	58%	28%
Retired	45%	64%	34%	37%	31%	41%	44%	17%	29%	52%	21%
Students	65%	73%	67%	68%	42%	69%	68%	42%	67%	72%	45%

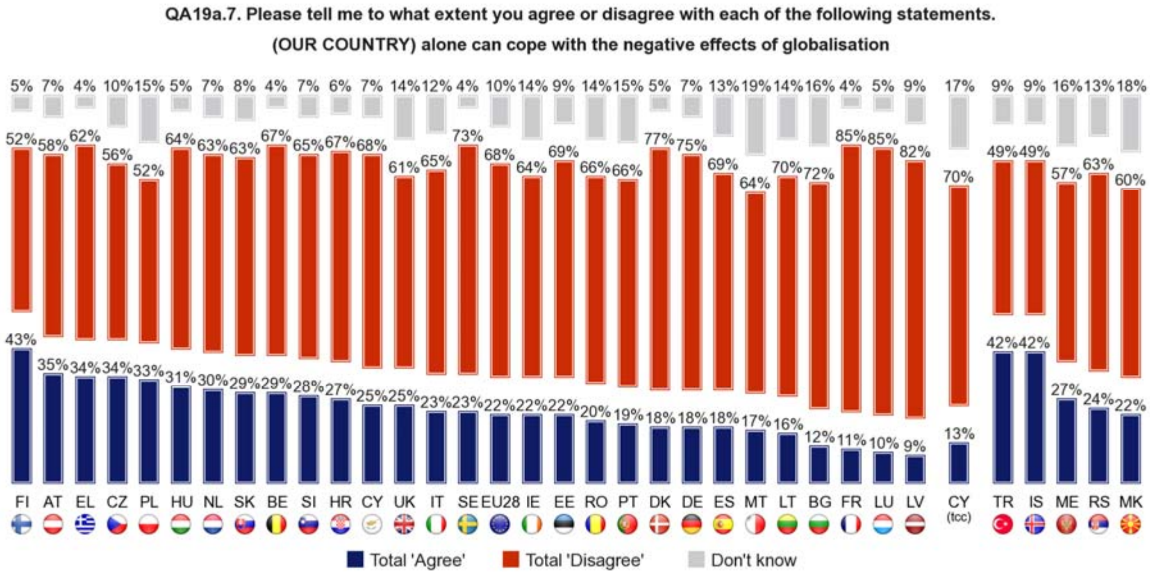
5.2. The European Union and the effects of globalisation

Faced with globalisation, a large majority of Europeans continue to believe that they are better united than alone. More than two-thirds of Europeans (68%, +1 percentage point since spring 2013) do not believe that “their country alone can cope with the negative effects of globalisation”. Only 22% (-1) agree with this statement, while 10% (unchanged) expressed no opinion[28].



A detailed analysis by country reveals that a majority of respondents in all Member States disagree that their country alone “can cope with the negative effects of globalisation”. This opinion is the most widespread in France (85%, +3 percentage points), Luxembourg (85%, +1) and Latvia (82%, +2), while opinions are more evenly divided in Finland (52%, +4, versus 43%, -2) and Poland (52%, -3, versus 33%, +1). The proportion of respondents who consider that their country cannot cope alone with the negative effects of globalisation has risen significantly in the United Kingdom (61%, +9), Bulgaria (72%, +7) and Malta (64%, +7), but has decreased sharply in the Czech Republic (56%, -8).

[28] QA19a.7 To what extent do you agree or disagree with each of the following statements. (OUR COUNTRY) alone can cope with the negative effects of globalisation.



In the **candidate countries**:

- Whereas only a minority of respondents believed that that their country could not cope on its own with the effects of globalisation in the spring 2013 survey, this view is now shared by the majority in Turkey (49% versus 42%, compared with 36% versus 46%) and Iceland (49% versus 42%, compared with 45% versus 48%).

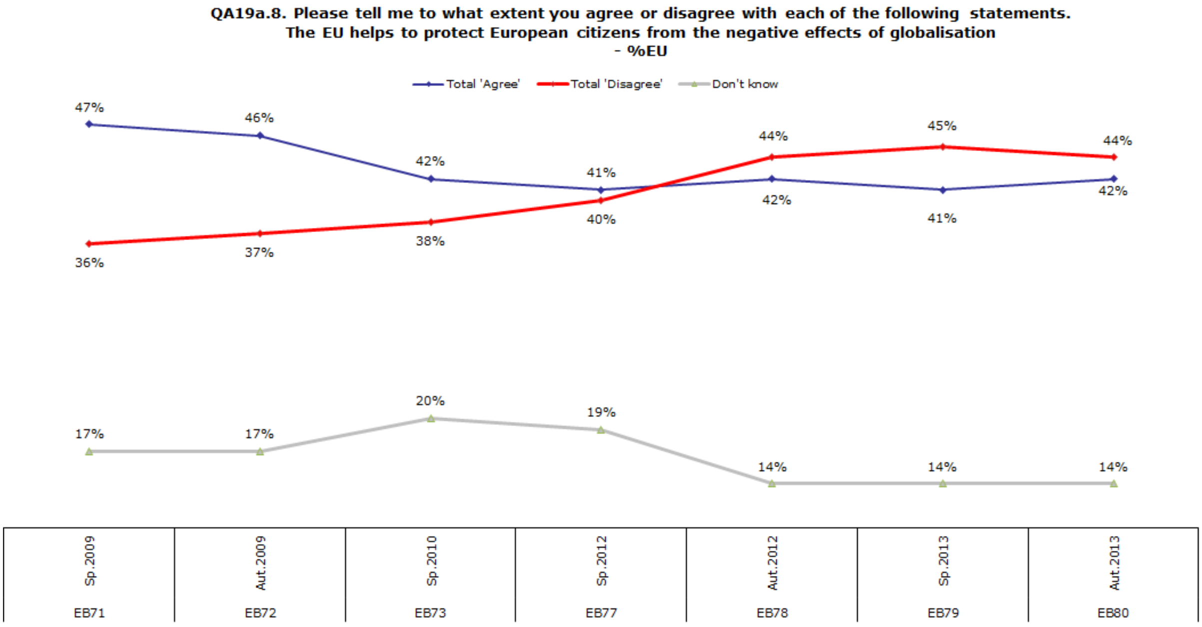
- It is still the predominant view in Serbia (63%, -1 percentage point), the Former Yugoslav Republic of Macedonia (60%, -1) and Montenegro (57%, -5).

- Europeans are divided on the EU's ability to protect them from the negative effects of globalisation -

In order to gain a closer insight into perceptions of the EU's role in globalisation, the sample was divided into two groups, on a totally random basis. **Respondents in the first group ("split A")** were asked for their views on globalisation **using negative wording: "the EU helps to protect European citizens from the negative effects of globalisation". Those in the second group ("split B") were presented with a positively-worded statement on globalisation: "the EU enables European citizens to better benefit from the positive effects of globalisation".**

The negative wording (split A)

44% of Europeans (-1 percentage point since spring 2013) do not currently believe that the EU helps to protect European citizens from the negative effects of globalisation, while 42% (+1) take the opposite view and 14% (unchanged) expressed no opinion[29]. Although these changes do not amount to a real reversal of the ratio, it is nevertheless the case that, for the first time since the Standard Eurobarometer survey of spring 2009 (EB71), the slow decline in the belief that the European Union acts as a buffer against the negative effects of globalisation has been halted (the proportion of respondents disagreeing that the European Union helps to protect citizens rose from 36% in spring 2009, to 45% in spring 2013). The opinion ratio has now returned to its autumn 2012 (EB78) level of -2, compared with -4 in the spring 2013 Eurobarometer survey (EB79).



The image of the European Union as providing protection against globalisation is predominant and has gained some ground in non-euro area countries (46% versus 36%, compared with 45% versus 38%).

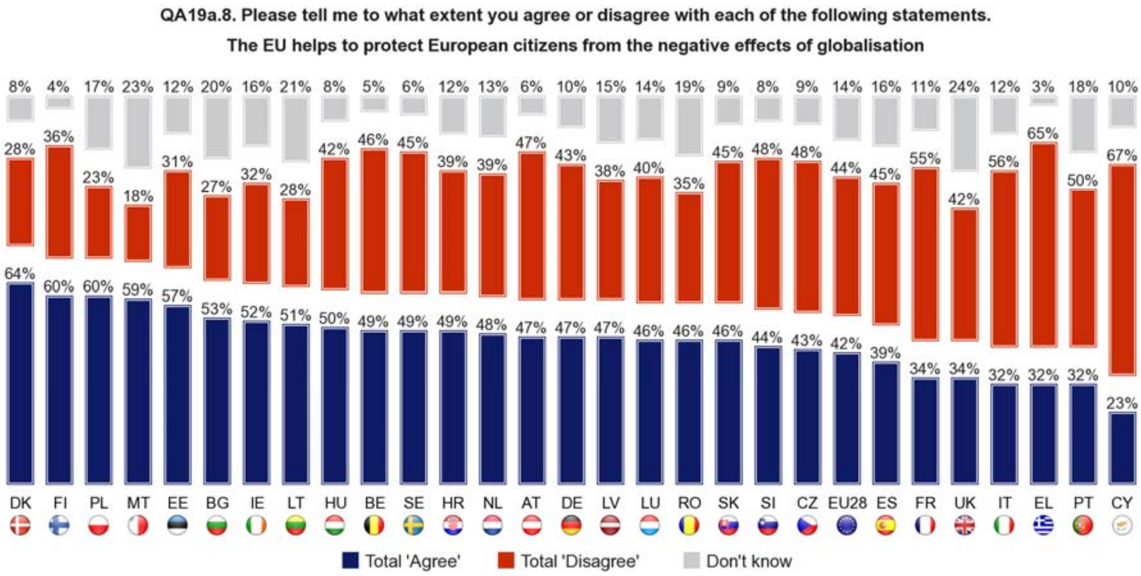
It is still the minority opinion, without any significant changes, in the euro area countries (40% versus 49%, compared with 40% versus 48%).

[29] QA19a.8. Split A. Please tell me to what extent you agree or disagree with each of the following statements. The EU helps to protect European citizens from the negative effects of globalisation.

The impression that the European Union protects its citizens from the negative effects of globalisation is predominant in 18 Member States, with a large majority in Denmark (64%, +1 percentage point), Finland (60%, +11), Poland (60%, -1), Malta (59%, +3), Estonia (57%, +10), Bulgaria (53%, unchanged), Ireland (52%, +6) Lithuania (51%, -2) and, with a far narrower opinion ratio, in Belgium (49%, -4, versus 46%, +6), Sweden (49%, +4, versus 45%, -2), Germany (47%, =, versus 43%, -1), Luxembourg (46%, -8, versus 40%, +1) and Slovakia (46%, -2, versus 45%, +6).

Opinions are evenly divided in Austria (47% versus 47%), whereas the opinion ratio was positive in spring 2013 (50% versus 44%).

As was the case in the previous Eurobarometer survey, a majority of respondents in nine Member States say that the EU does not help to protect its citizens from the negative effects of globalisation: Cyprus (67%, +1 percentage point), Greece (65%, +2), Italy (56%, +4), France (55%, -1), Portugal (50%, -2), the Czech Republic (48%, -5, versus 43%, +7), Slovenia (48%, -9, versus 44%, +5), Spain (45%, -2, versus 39%, +5) and the United Kingdom (42%, -2, versus 34%, +2).

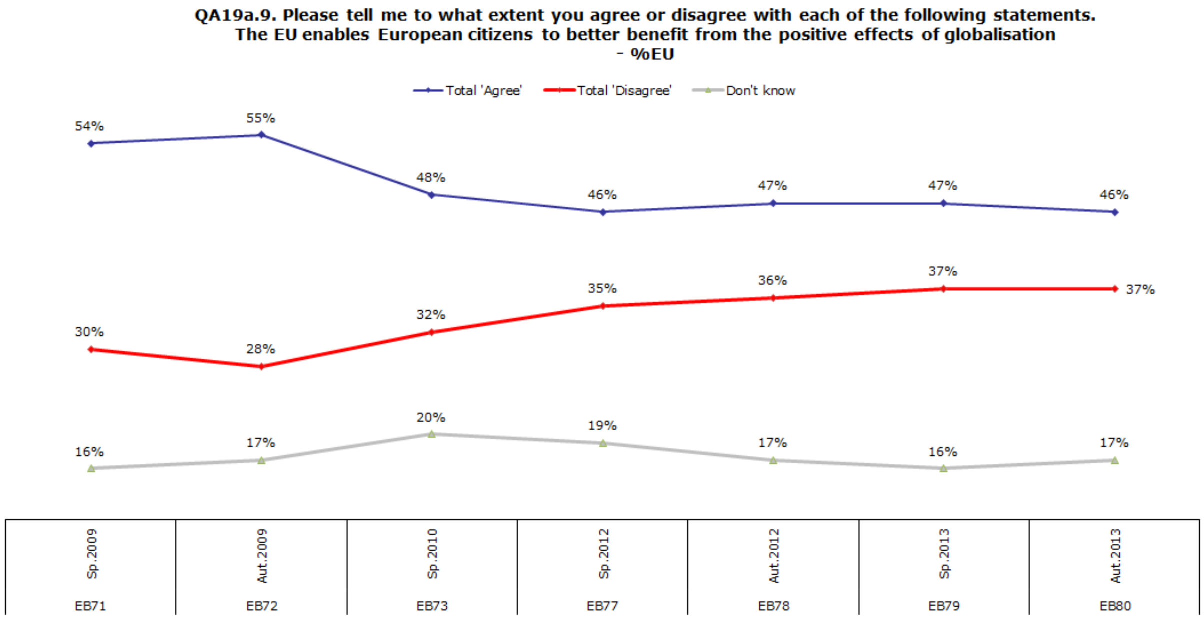


Only split A

Beliefs regarding whether the EU protects against the negative effects of globalisation are strongly structured by the sociological profile of respondents. The EU is seen as providing a protective framework by a majority of 15-24 year-olds, those who studied up to the age of 20 or beyond, managers and those who place themselves at the top of the social scale. However, this view is shared by only a minority of respondents aged 25 or over, those who completed their education before the age of 20, housepersons and unemployed people.

The positive wording (split B)

46% of Europeans (-1 percentage point since spring 2013) agree that **"the EU enables European citizens to better benefit from the positive effects of globalisation"**, while 37% (unchanged) disagree and 17% (+1) expressed no opinion[30]. The opinion ratio has stabilised, and has changed only marginally since the surveys in spring 2013 (EB79) and autumn 2012 (EB78).



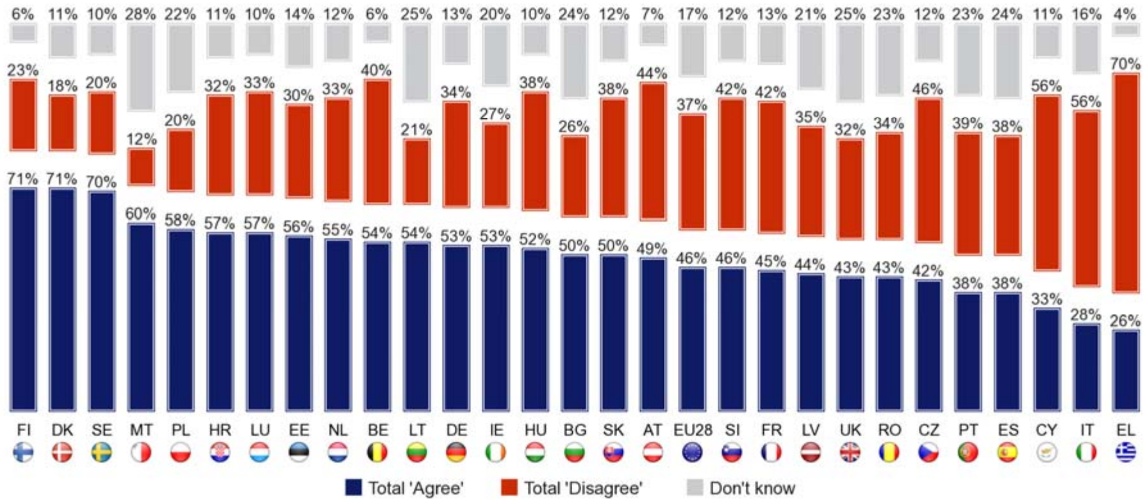
A majority of respondents in 22 Member States are positive about the EU's role in enabling its citizens to benefit from globalisation, with an absolute majority in 16 Member States, led by the Nordic countries (71% in Finland and Denmark, 70% in Sweden), Malta (60%), Poland (58%), Croatia (57%) and Luxembourg (57%). The balance of opinion is narrower in Austria (49% versus 44%), Slovenia (46% versus 42%) and France (45% versus 42%).

Positive opinions have declined by eleven percentage points in Latvia, seven percentage points in Malta and five percentage points in the United Kingdom, Ireland and France. They have gained five percentage points in Finland, four percentage points in Portugal and three percentage points in the Netherlands and Romania, and also in Austria, where the opinion ratio is now positive again (49% versus 44%) compared with spring 2013 when opinions were evenly divided (46% versus 46%).

[30] QA19a.9. Split B. Please tell me to what extent you agree or disagree with each of the following statements. The EU enables European citizens to better benefit from the positive effects of globalisation.

Opinions are evenly balanced in Spain (38% versus 38%), whereas the ratio was negative (36% versus 39%) in spring 2013. As a result, there are now just five countries where only a minority of respondents believe that the EU enables its citizens to benefit more fully from the positive effects of globalisation: Greece (70% “disagree”, +8 percentage points), Cyprus (56%, -1), Italy (56%, +6), the Czech Republic (46%, -1, versus 42%, +1) and Portugal, where opinions are almost evenly divided (39%, -7, versus 38%, +4).

QA19a.9. Please tell me to what extent you agree or disagree with each of the following statements.
The EU enables European citizens to better benefit from the positive effects of globalisation

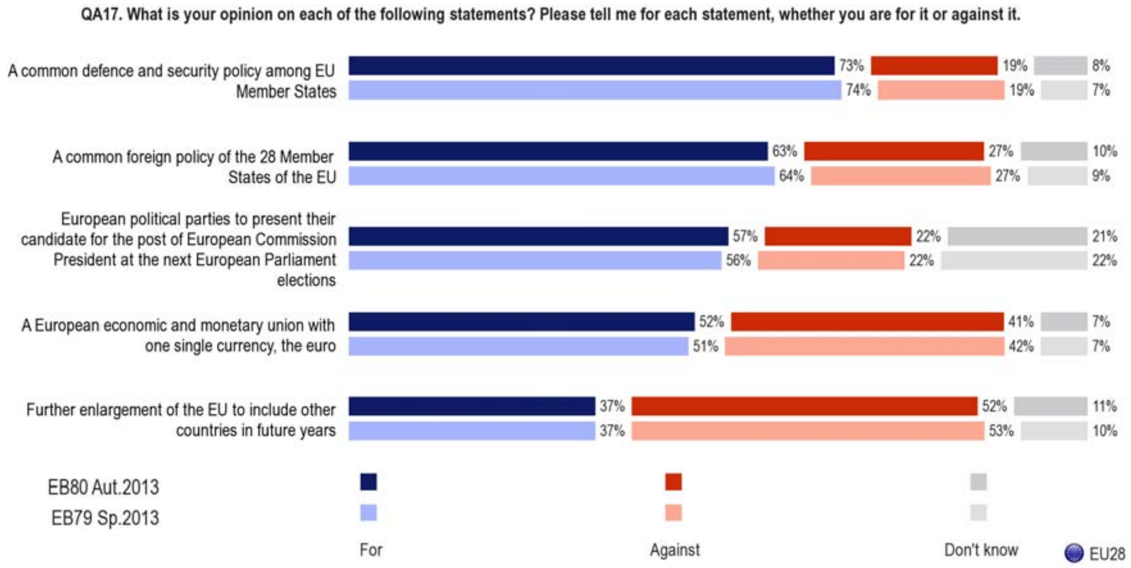


Only split B

III. THE EUROPEAN UNION TODAY AND TOMORROW

1. Support for European policies

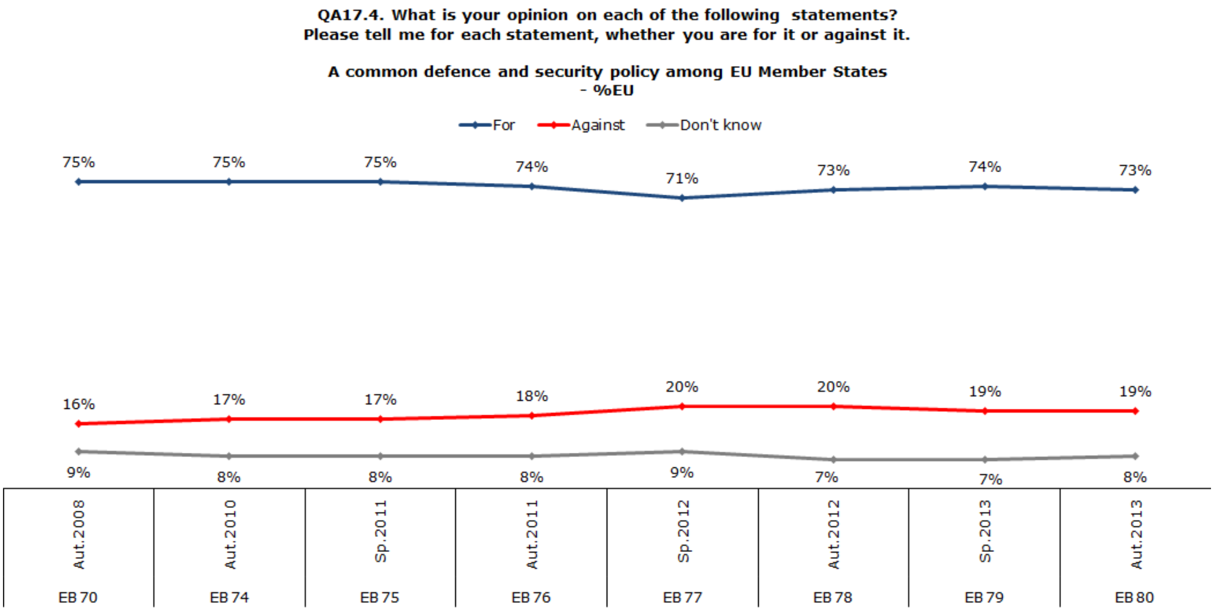
Support for the fundamental policies of the European Union has not changed significantly since the Standard Eurobarometer survey of spring 2013 (EB79). All these policies, with the sole exception of further enlargement of the EU to include other countries, continue to receive the approval of an absolute majority of Europeans.



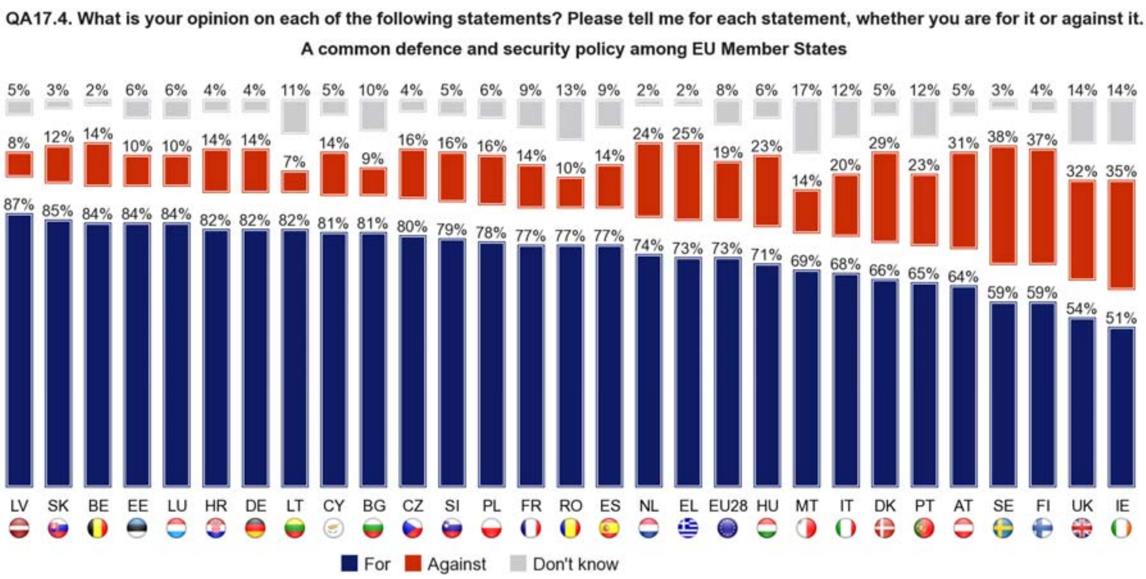
A common defence and security policy among EU Member States

Almost three-quarters of respondents (73%, -1 percentage point since spring 2013) support a common defence and security policy among EU Member States, while 19% (unchanged) oppose the idea and 8% (+1) expressed no opinion[31]. Support for this policy is overwhelming and constant over time: only limited changes have been recorded for this indicator since the Standard Eurobarometer survey of autumn 2008 (EB70).

[31] QA17.4. Please tell me for each statement, whether you are for or against it. A common defence and security policy among EU Member States



There is a broad consensus of European public opinion on this policy. As in the previous survey in spring 2013, it is supported by an absolute majority of respondents in every EU country, led by Latvia (87%, +4 percentage points), Slovakia (85%, -1), Belgium (84%, +2), Estonia (84%, -2) and Luxembourg (84%, -1). The minority opposition to this policy is higher than the EU average (19%, EU28) in five Member States: Sweden (38%, -1), Finland (37%, -3), Ireland (35%, +1), the United Kingdom (32%, -2) and Austria (31%, -2).



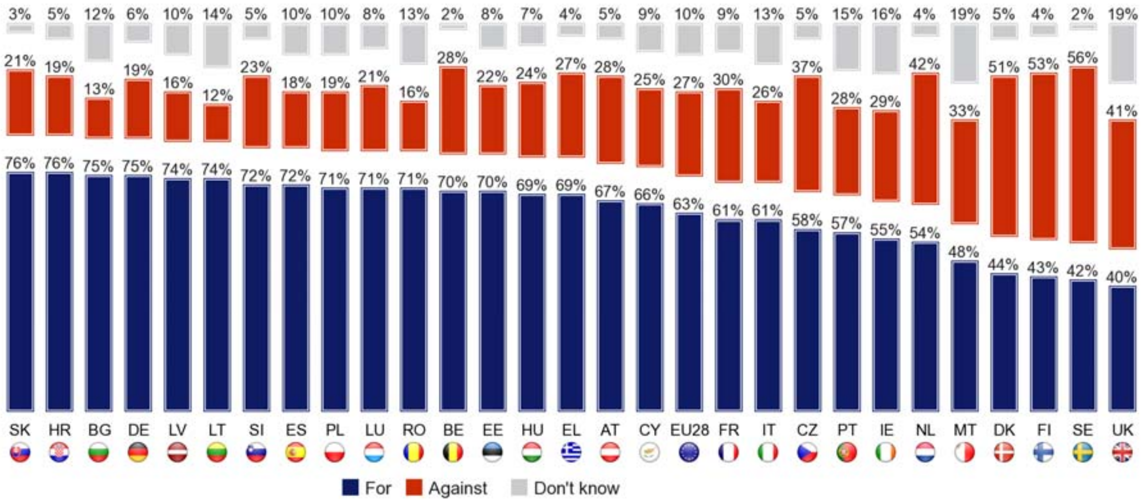
Approval of this policy has increased strongly in Malta (69%, +9 percentage points), but has decreased by four percentage points in Bulgaria (81%), Poland (78%), Italy (68%) and Denmark (66%).

A common foreign policy of the 28 Member States of the EU

Just under two-thirds of Europeans (63%, -1 percentage point since spring 2013) are in favour of a common foreign policy of the 28 EU Member States, while 27% (unchanged) are against the idea and 10% (+1) expressed no opinion[32].

As in the previous surveys, respondents are predominantly opposed to this policy in the Nordic countries (Sweden (56%, unchanged, versus 42%, +1 percentage point), Finland (53%, +3, versus 43%, -1) and Denmark (51%, -2, versus 44%, =)) and the United Kingdom (41%, -4, versus 40%, -2). It has the support of a relative majority of respondents in Malta (48%, +7, versus 33%, -6) and an absolute majority of respondents in all the other EU countries, with the highest scores in Slovakia (76%, -1), Croatia (76%, =), Bulgaria (75%, -1) and Germany (75%, =). Since spring 2013, in addition to the 7-point rise recorded in Malta, approval has grown significantly in Austria (67%, +6), but has lost most ground in Italy (61%, -5).

QA17.2. What is your opinion on each of the following statements? Please tell me for each statement, whether you are for it or against it.
A common foreign policy of the 28 Member States of the EU



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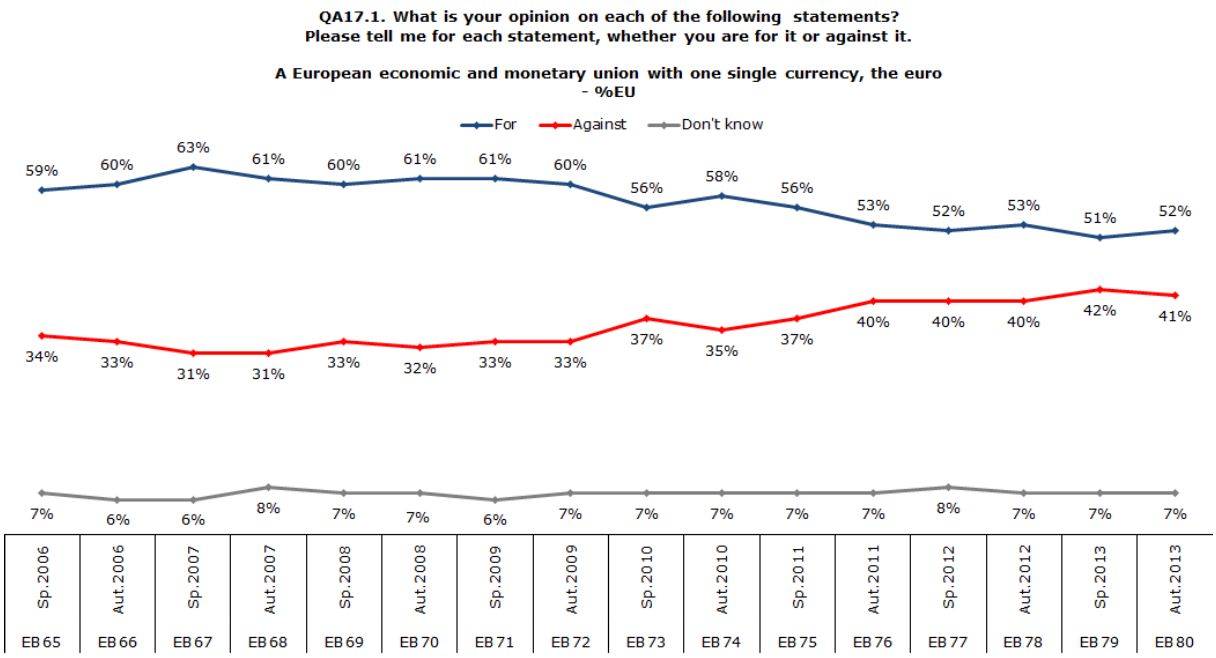
32 QA17.2. Please tell me for each statement, whether you are for or against it. A common foreign policy of the 28 Member States of the EU.

European economic and monetary union with a single currency, the euro

The spring 2013 survey (EB79) had recorded the lowest ever opinion ratio (+9) between support for and opposition to the euro since this indicator was first used in the Eurobarometer surveys. In the autumn 2013 survey, following an increase of one percentage point in approval (52%) and a decrease of one percentage point in disapproval (41%), the opinion ratio has improved slightly by two percentage points, to +11.

While the deterioration in opinions on the euro has been halted, the ratio between approval and disapproval is still far from the levels recorded in autumn 2010 (+23, in l'EB74) and autumn 2009 (+27, EB72)[33].



A substantial and slightly increased majority of respondents in the euro area countries (63%, +1 percentage point) are still in favour of economic and monetary union and the euro.

Despite a significant decrease in opposition, a clear majority of respondents in the non-euro area countries (58%, -5 percentage points) are still against economic and monetary union.

[33] QA17.1. Please tell me for each statement, whether you are for or against it. A European economic and monetary union with one single currency, the euro

As a result, the opinion ratio has been favourably reversed in Latvia[34] (53% versus 40%, compared with 43% versus 51% in spring 2013), but has deteriorated in Cyprus, where opinions were evenly balanced in spring 2013 (47% versus 47%), and has become negative (44% versus 52%).

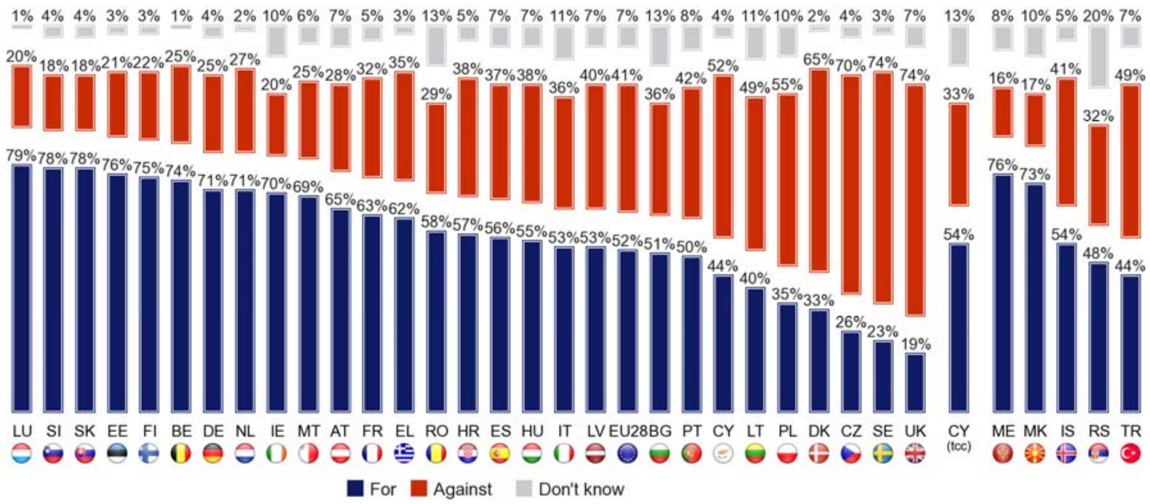
In total, a majority of respondents oppose the euro in seven Member States. In addition to Cyprus, respondents in the United Kingdom (74%, -5 percentage points), Sweden (74%, -5), the Czech Republic (70%, -1), Denmark (65%, -1), Poland (55%, -8) and Lithuania (49%, -3, versus 40%, unchanged) are predominantly against the euro.

Cyprus is therefore the only euro area country where European economic and monetary union is not supported by a majority of respondents. In the remaining 16 countries, an absolute majority of respondents support monetary union, with scores ranging from 50% in Portugal (-2 percentage points) to 79% in Luxembourg (+2). In the euro area countries, support for the single currency has increased the most in Germany (71%, +5), while it has decreased the most significantly in Italy (53%, -6).

A majority of respondents in four countries which have not adopted the single currency are also in favour of economic and monetary union: in Romania (58%, +2 percentage points), Croatia (57%, -4), Hungary (55%, +5) and Bulgaria (51%, +7).

QA17.1. What is your opinion on each of the following statements? Please tell me for each statement, whether you are for it or against it.

A European economic and monetary union with one single currency, the euro



[34] At the time of the fieldwork for this survey in November 2013, Latvia was preparing to introduce the euro on 1 January 2014.

In the candidate countries, a large majority of respondents continue to support the euro in Montenegro (76%, +2 percentage points) and the Former Yugoslav Republic of Macedonia (73%, -1). After becoming the majority opinion for the first time in the spring 2013 survey, approval has gained further ground in Iceland (54%, +5). However, support for the euro has decreased very sharply in Serbia (48%, -8). Lastly, the opinion ratio has been reversed and is now negative in Turkey: opposition to the euro now outweighs support (49% versus 44%), whereas the opposite was true in the spring 2013 survey (41% versus 38%).

A socio-demographic analysis reveals a number of differences between categories: people with financial difficulties (52% versus 40%), those who place themselves at the bottom of the social scale (48% versus 44%) and those who left school at the age of 15 or earlier (46% versus 44%) tend to oppose the euro. The other categories are predominantly in favour. A majority of respondents in all age categories support it, with opinion ratios ranging from 55/37 among 15-24 year-olds to 51/42 among those aged 55 or over. Finally, trust in the EU and support for the euro do not necessarily go hand in hand. Certainly, support is considerably above the European average among those who trust the EU (71%). However, it is interesting to observe that opinions remain divided among those who do not trust the EU: although 50% of them are against the euro, a strong minority (44%) are nevertheless in favour of it.

QA17.1. What is your opinion on each of the following statements? Please tell me for each statement, whether you are for it or against it.

A European economic and monetary union with one single currency, the euro

	For	Against	Don't know
EU28	52%	41%	7%
Gender			
Man	56%	39%	5%
Woman	49%	43%	8%
Age			
15-24	55%	37%	8%
25-39	54%	40%	6%
40-54	52%	42%	6%
55 +	51%	42%	7%
Education (End of)			
15-	44%	46%	10%
16-19	50%	44%	6%
20+	61%	34%	5%
Still studying	61%	32%	7%
Socio-professional category			
Self-employed	56%	38%	6%
Managers	60%	35%	5%
Other white collars	55%	40%	5%
Manual workers	48%	45%	7%
House persons	48%	43%	9%
Unemployed	48%	45%	7%
Retired	51%	42%	7%
Students	61%	32%	7%
Difficulties paying bills			
Most of the time	40%	52%	8%
From time to time	50%	43%	7%
Almost never/ Never	57%	37%	6%
Self-positioning on the social staircase			
Low (1-4)	44%	48%	8%
Medium (5-6)	54%	40%	6%
High (7-10)	59%	35%	6%
Trust in EU			
Tend to trust	71%	24%	5%
Tend not to trust	44%	50%	6%
Image of EU			
Positive	72%	24%	4%
Neutral	53%	39%	8%
Negative	33%	61%	6%

The following table shows the results by socio-demographic criteria in the whole of the European Union (EU28) on average, in the six largest EU countries and in four countries which have been particularly badly affected by the economic crisis.

QA17.1. What is your opinion on each of the following statements? Please tell me for each statement, whether you are for it or against it.

A European economic and monetary union with one single currency, the euro
Answer : 'For'

	EU28	DE	ES	FR	IT	PL	UK	EL	PT	IE	CY
	52%	71%	56%	63%	53%	35%	19%	62%	50%	70%	44%
Gender											
Male	56%	74%	60%	70%	55%	33%	23%	64%	57%	71%	49%
Female	49%	68%	51%	57%	52%	36%	16%	59%	43%	69%	39%
Age											
15-24	55%	67%	67%	59%	59%	47%	23%	62%	63%	64%	42%
25-39	54%	72%	57%	64%	53%	39%	22%	59%	52%	70%	42%
40-54	52%	67%	61%	60%	53%	30%	22%	62%	53%	75%	44%
55 +	51%	74%	46%	66%	51%	28%	14%	63%	42%	69%	46%
Education (End of)											
15-	44%	64%	42%	56%	46%	22%	12%	59%	42%	55%	36%
16-19	50%	69%	55%	53%	56%	29%	18%	61%	54%	65%	37%
20+	61%	78%	76%	74%	60%	42%	27%	61%	68%	82%	57%
Still studying	61%	75%	68%	74%	61%	50%	22%	72%	70%	72%	47%
Socio-professional category											
Self-employed	56%	76%	69%	68%	60%	37%	20%	63%	53%	77%	37%
Managers	60%	76%	83%	82%	65%	43%	20%	66%	67%	80%	71%
Other white collars	55%	68%	78%	58%	55%	40%	27%	66%	51%	78%	40%
Manual workers	48%	63%	54%	50%	48%	30%	14%	55%	51%	68%	44%
House persons	48%	70%	39%	53%	46%	37%	19%	61%	55%	64%	39%
Unemployed	48%	69%	50%	56%	50%	24%	30%	46%	45%	63%	36%
Retired	51%	73%	48%	68%	51%	30%	14%	67%	41%	68%	51%
Students	61%	75%	68%	74%	61%	50%	22%	72%	70%	72%	47%

Further enlargement of the EU to include other countries in future years

An absolute majority of Europeans continue to oppose further enlargement of the EU to include other countries in the coming years (52%, -1 percentage point), while 37% (unchanged since spring 2013) support it and 11% (+1) expressed no opinion[35].

The divide between euro area and non-euro area countries remains very striking on the possibility of further enlargement: an absolute majority of euro area respondents (60%, unchanged) are against the idea, while a relative majority of non-euro area respondents (49%,-1, versus 39%) are in favour.

In this survey, the opinion ratio has shifted back in favour of the enlargement of the EU to include other countries in the future in Sweden (56% versus 40%, compared with 47% versus 50% in spring 2013).

[35] QA17.3. Please tell me for each statement, whether you are for or against it. Further enlargement of the EU to include other countries in future years

Therefore, a majority of respondents in thirteen Member States now support further EU enlargement. In addition to Sweden, the other countries where respondents are predominantly in favour of enlargement are Croatia (71%, unchanged), Romania (64%, +3 percentage point), Lithuania (64%, =), Poland (61%, -10), Hungary (60%, +5), Malta (60%, +9), Bulgaria (55%, +1), Slovenia (52%, -5), Slovakia (51%, -1), Estonia (51%, -2), Latvia (48%, -3, versus 38%, +2) and Spain (44%, +1, versus 37%, -1). In this group of countries, support for further enlargement has increased strongly in Malta, but has fallen sharply in Poland.

Opponents of further enlargement outnumber supporters in 15 EU countries, led by Austria (76%, +7 percentage points), France (70%, -1), Germany (69%, -6), Finland (65%, -5), the Netherlands (64%, -4) and Luxembourg (64%, -2). Other than in Austria, opposition to EU enlargement has increased significantly in Italy (59%, +7) in this survey.

The presentation by the European parties of a candidate for the post of European Commission President at the next European elections

57% (+1 percentage point) of Europeans approve of the proposal that European parties should present a candidate for the post of European Commission President at the next elections for the European Parliament, while just over a fifth of them (22%, unchanged) are against the idea. The “DK” rate for this question remains high: more than a fifth of respondents (21%, -1) expressed no opinion[36]. The proposal is supported by absolute majorities in 26 of the 28 Member States, with the highest scores being recorded in Hungary (78%, =), Sweden (74%, +2), Germany (69%, -2) and Greece (69%, =), and by a relative majority of respondents in France (46%, =, versus 33%, -1) and the United Kingdom (43%, -4, versus 27%, -2).

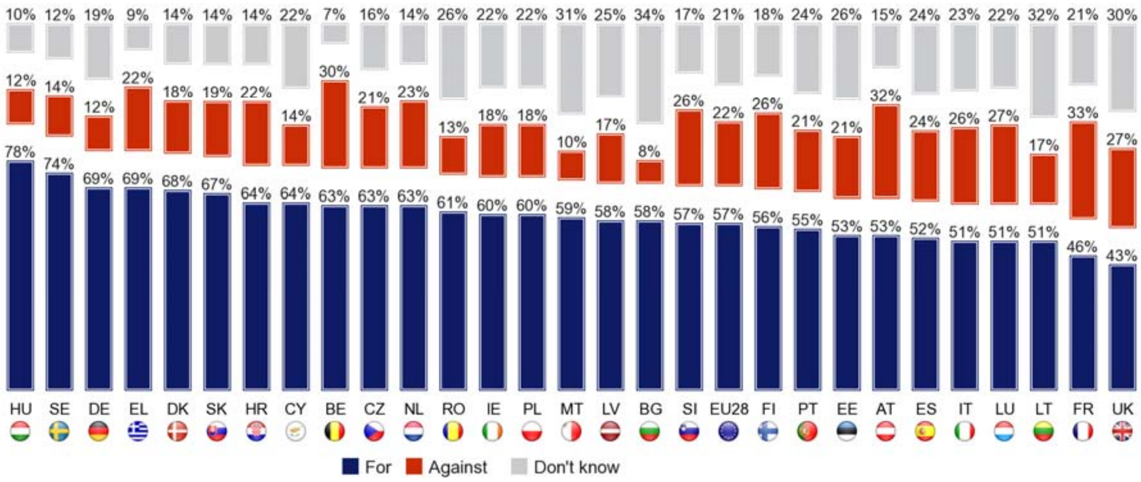
The “DK” rates for this question are particularly high (with an EU average of 21%) and are equal to or exceed 30% in Bulgaria (34%, -6 percentage points), Lithuania (32%, -1), Malta (31%, +2) and the United Kingdom (30%, +6).

Support for this proposal has increased significantly in Spain (52%, +9 percentage points) since spring 2013. It has however fallen sharply in Luxembourg (51%, -12).

[36] QA17.5. What is your opinion on each of the following statements? Please tell me for each statement, whether you are for it or against it. European political parties to present their candidate for the post of European Commission President at the next European Parliament election

QA17.5. What is your opinion on each of the following statements? Please tell me for each statement, whether you are for it or against it.

European political parties to present their candidate for the post of European Commission President at the next European Parliament elections



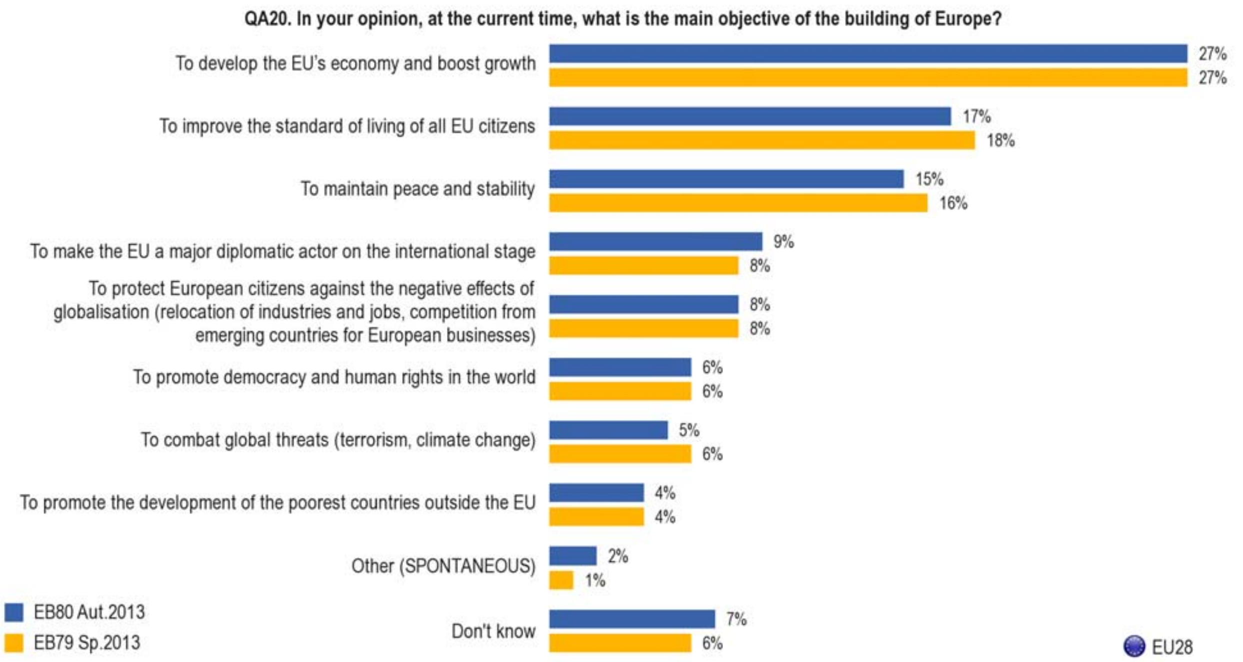
2. THE OBJECTIVE OF THE BUILDING OF EUROPE

- For Europeans, improving the living standards of all EU citizens tops the list of objectives of European integration -

Europeans were asked what they perceived as the main objective of European integration, and what they felt the main objective should in fact be. As in the spring 2013 and autumn 2012 surveys, **developing the economy and boosting growth** tops the list of *perceived* objectives, while improving the living standards of all EU citizens tops the list of *desired* objectives.

2.1. The perceived objectives of the building of Europe

Developing the EU's economy and boosting growth was mentioned by more than a quarter of respondents (27%, unchanged since spring 2013), and easily tops the list of the perceived objectives of the building of Europe. With a score of 17% (-1 percentage point since spring 2013), improving the standard of living of all EU citizens is ranked in second place, followed in third place by maintaining peace and stability (15%, -1). All the other items were mentioned by fewer than 10% of respondents[37].



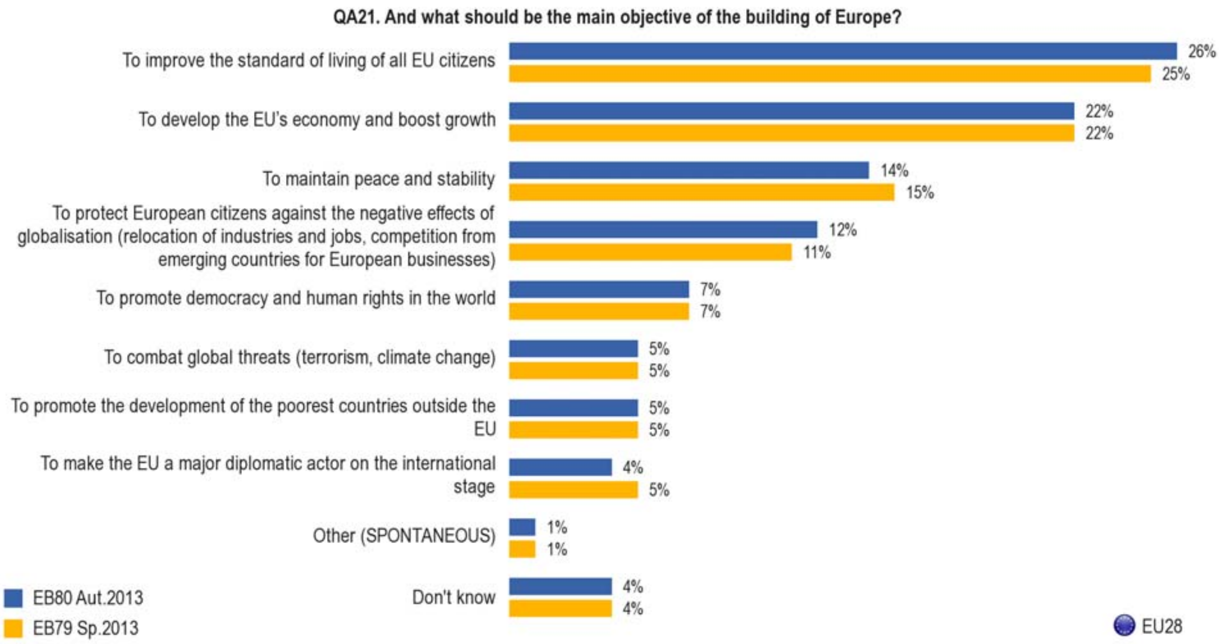
[37] QA20. In your opinion, at the current time, what is the main objective of the building of Europe? (One answer only).

Developing the economy and boosting growth is ranked as the top perceived objective of European integration in 24 of the 28 Member States, with the highest scores in the Netherlands (46%), Sweden (43%) and Finland (39%). It is ranked equally with improving the standard of living in Italy (21%).

Improving the standard of living is the main perceived objective of the EU in three countries: Latvia (28% versus 25% for developing the economy and boosting growth), Poland (22% versus 20%) and Romania (27% versus 26%). Lastly, "**making the EU a major diplomatic actor on the international stage**" tops the list of perceived objectives of European integration in Greece, with a score of 22%, versus 19% for developing the economy and boosting growth.

2.2. The desired objectives of the building of Europe

Improving the standard of living of all citizens is ranked as the top desired objective of European integration (26%, +1 percentage point since spring 2013), ahead of **developing the economy and boosting growth** (22%, unchanged), **maintaining peace and stability** (14%, -1) and **protecting European citizens against the negative effects of globalisation** (12%, +1). All the other objectives recorded scores of less than 10%[38].



There are very few differences between the euro area and non-euro area countries as regards the desired objectives of European integration.

[38] QA21. And what should be the main objective of the building of Europe? (One answer only).

Improving the standard of living of all EU citizens tops the list of desired objectives of the European project in 22 Member States (Belgium, Bulgaria, Croatia, the Czech Republic, Estonia, Ireland, Greece, Spain, France, Cyprus, Latvia, Lithuania, Luxembourg, Malta, Austria, Poland, Portugal, Romania, Slovakia, Slovenia, Finland and the United Kingdom), the highest scores being recorded in Latvia (41%, +1 percentage point), Cyprus (39%, -2), Slovakia (37%, +2), Bulgaria (37%, -8) and Spain (36%, +5). The proportion of respondents mentioning this objective has increased significantly in Portugal (35%, +7).

Developing the economy and boosting growth is the most frequently mentioned desired objective in four EU Member States: the Netherlands (30%, -1 percentage point), Hungary (25%, -2), Denmark (24%, -4) and Italy (22%, -2). This objective was also frequently mentioned in Slovenia (30%, -2), Spain (27%, +2) and Romania (27%, -3).

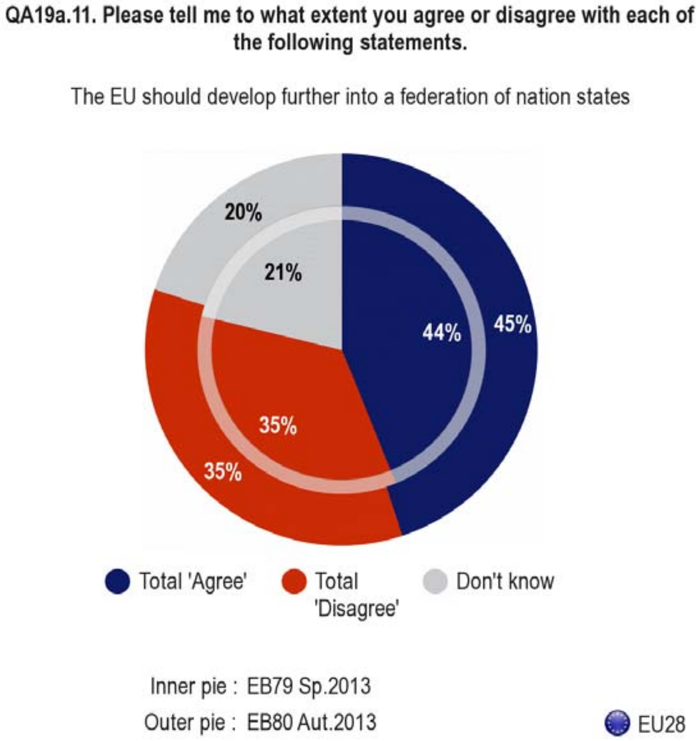
Lastly, respondents in Germany (27%, -1) and Sweden (24%, +2) placed **maintaining peace and stability** at the top of their list of desired objectives of European integration.

3. THE FUTURE OF THE EUROPEAN UNION

3.1. Opinions on a federation of nation states

- A stable relative majority of Europeans support the development of the European Union into a federation of nation states -

Public opinion on the development of the European Union as a federation of nation states is stable: 45% of Europeans (+1 percentage point since spring 2013) support this idea, while 35% (unchanged) oppose it. A striking proportion of respondents, one in five, were unable to answer this question (20%, -1)[39].



Respondents in the euro area countries (47% versus 34%) are far more likely than those in the non-euro area countries (40% versus 38%) - where opinion is almost evenly divided - to support the idea that the EU should move towards a federation of nation states.

[39] QA19a11. Please tell me to what extent you agree or disagree with each of the following statements. The EU should develop further into a federation of nation states.

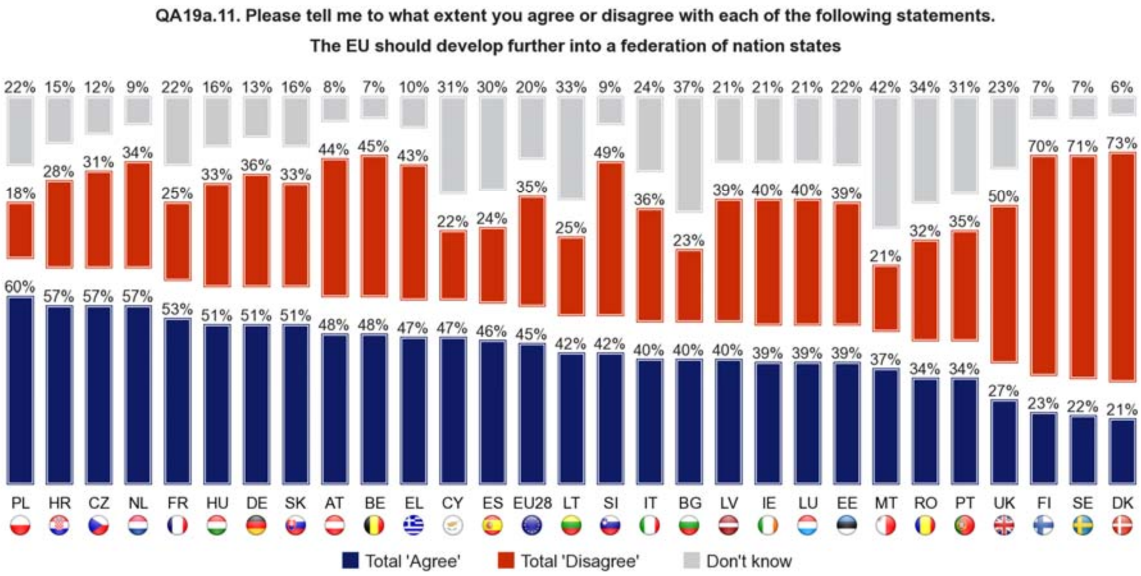
The opinion ratio has been reversed negatively in three countries, that is to say a majority of respondents now oppose the development of the EU into a federation of nation states. These countries are Luxembourg (39% versus 40% now, compared with 50% versus 39% in spring 2013), Portugal (34% versus 35%, compared with 42% versus 29%) and Slovenia (42% versus 49%, compared with 44% versus 39%). The decrease in favourable opinions in Luxembourg (-11 percentage points) is particularly striking.

Opinions are evenly divided in Estonia (39% versus 39%), whereas a majority supported the development of the EU as a federation of nation states (44% versus 37%) in spring 2013.

In total, a majority of respondents in eight Member States oppose the development of the EU as a federation of nation states. In addition to the Slovenia, Portugal and Luxembourg, as mentioned above, this group includes five countries in which respondents were already predominantly against the idea in spring 2013, namely the Nordic countries (73% in Denmark, 71% in Sweden and 70% in Finland), the United Kingdom (50%) and Ireland (40% versus 39%).

However, a majority of respondents support this idea in 19 EU countries, with an absolute majority in eight of them: Poland (60%), Croatia (57%), the Czech Republic (57%), the Netherlands (57%), France (53%), Hungary (51%), Germany (51%) and Slovakia (51%).

The “DK” rate for this question remains very high, with an EU average of 20%. In four countries, the “DK” rate is equal to or exceeds a third of respondents: Malta (42%), Bulgaria (37%), Romania (34%) and Lithuania (33%).



A socio-demographic analysis shows that opinions regarding the development of the European Union as a federation of nation states are significantly shaped by attitudes to the EU.

Accordingly, respondents with pro-European attitudes are more likely to support the future development of the EU into a federation of nation states. An absolute majority of those who are satisfied with how democracy works in the EU (56%), those for whom the EU conjures up a positive image (55%) and those who support the euro (55%) are in favour of the EU developing further as a federation of nation states, whereas a relative majority of those who are dissatisfied with the way in which democracy works in the EU (43% versus 39%), who have a negative image of the EU (43% versus 36%) or who are against the euro (45% versus 34%) disagree with this idea.

QA19a.11. Please tell me to what extent you agree or disagree with each of the following statements.

The EU should develop further into a federation of nation states

	Total 'Agree'	Total 'Disagree'	Don't know
EU28	45%	35%	20%
Gender			
Man	48%	36%	16%
Woman	42%	34%	24%
Age			
15-24	45%	33%	22%
25-39	46%	35%	19%
40-54	47%	35%	18%
55 +	42%	35%	23%
Education (End of)			
15-	35%	35%	30%
16-19	45%	35%	20%
20+	50%	36%	14%
Still studying	47%	32%	21%
Socio-professional category			
Self-employed	45%	36%	19%
Managers	48%	39%	13%
Other white collars	49%	35%	16%
Manual workers	43%	36%	21%
House persons	41%	32%	27%
Unemployed	43%	34%	23%
Retired	43%	35%	22%
Students	47%	32%	21%
Image of EU			
Positive	55%	30%	15%
Neutral	43%	34%	23%
Negative	36%	43%	21%
Euro			
For	55%	29%	16%
Against	34%	45%	21%
Satisfied with the way democracy works in the EU			
Yes	56%	30%	14%
No	39%	43%	18%

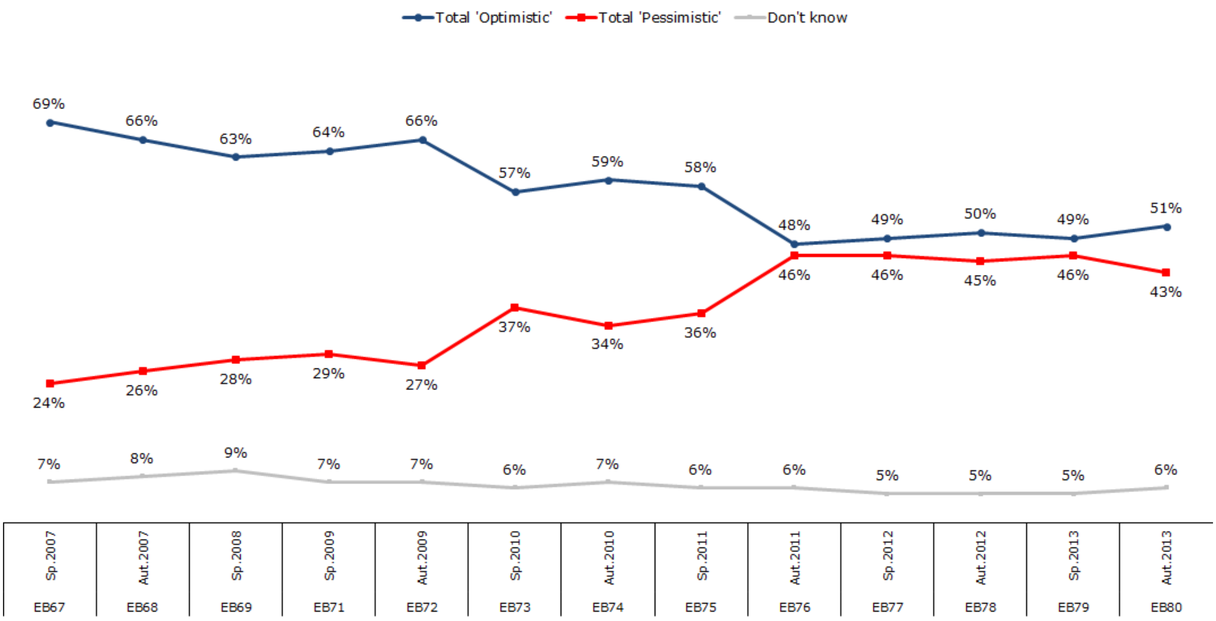
3.2. The future of the European Union

This Eurobarometer survey conducted in autumn 2013 records a slight revival in optimism about the future of the European Union. More than half of Europeans (51%, +2 percentage points since spring 2013) are optimistic about the future of the EU, while 43% (-3) are pessimistic.

The gap between optimistic and pessimistic expectations for the future of Europe is now +8 and has improved in comparison with the last four Eurobarometer surveys: it was +3 in spring 2013 (EB79), +5 in autumn 2012 (EB78), +3 in spring 2012 (EB77), and +2 in autumn 2011 (EB76).

However, this gap between optimism and pessimism remains considerably below the levels recorded during the period 2007-2011: +45 in spring 2007 (EB67), +40 in autumn 2007 (EB68), +39 in autumn 2009 (EB72) and +25 in autumn 2010 (EB74) for example[40].

QA22. Would you say that you are very optimistic, fairly optimistic, fairly pessimistic or very pessimistic about the future of the EU?



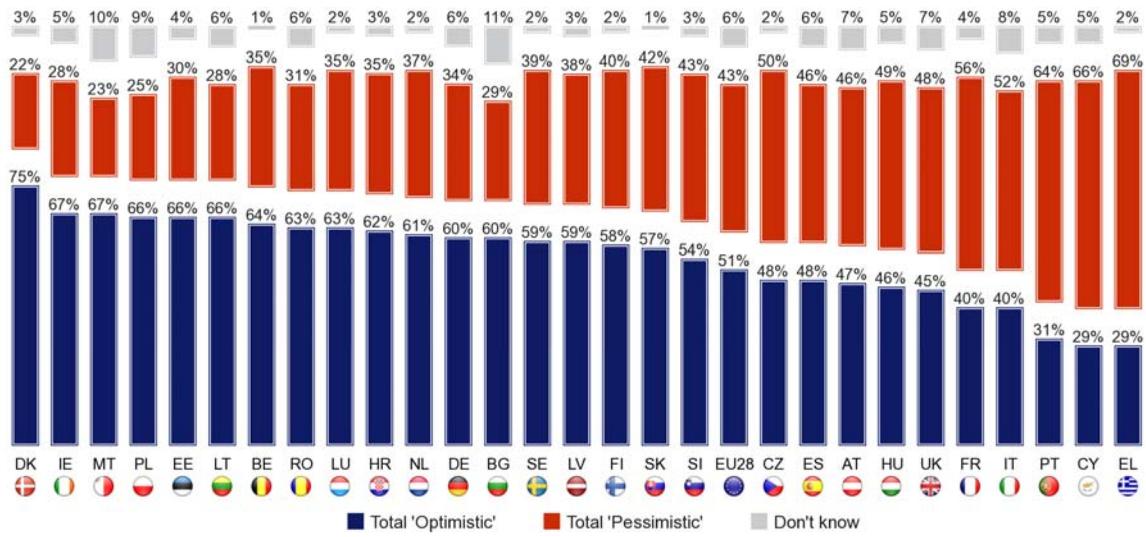
[40] QA22. Would you say that you are very optimistic, fairly optimistic, fairly pessimistic or very pessimistic about the future of the EU?

A majority of respondents in the euro area countries (49% versus 46%, compared with 47% versus 48%) are now optimistic about the future of Europe. However the opinion ratio between optimists and pessimists remains far narrower in this group of countries than in the non-euro area countries, where optimistic expectations are widespread and growing (56%, +4 percentage points).

The opinion ratio has been favourably reversed in this survey in Spain, where optimists now outnumber pessimists (48% versus 46%) whereas a majority of respondents were pessimistic in spring 2013 (52% versus 40%). **As a result, Spain has now joined the group of 20 Member States where respondents are more likely to be optimistic than pessimistic about the future of the EU.** Respondents in Denmark (75%, +3 percentage points), Ireland (67%, +9), Malta (67%, +4), Poland (66%, +3), Estonia (66%, +2) and Lithuania (66%, +2) are the most optimistic, while the narrowest majority in in Austria (47%, -1, versus 46%, unchanged). As well as in Ireland, optimism has increased significantly in Spain (48%, +8), Luxembourg (63%, +5) and Germany (60%, +5).

Eight Member States are predominantly pessimistic about the future of the EU: Greece (69%, unchanged), Cyprus (66%, -3 percentage points), Portugal (64%, -3), France (56%, +4), Italy (52%, +1), the Czech Republic (50%, -6, versus 48%, +6), Hungary (49%, =, versus 46%, +1) and the United Kingdom (48%, -6, versus 45%, +5). The index measuring the difference between optimistic and pessimistic forecasts has seen a marked 8-point fall in France (from -8 in spring 2013 to -16 now), with a 5-point decline in Italy (from -5 to -12). It has improved strikingly by 12 percentage points in the Czech Republic (from -14 to -2) and 11 percentage points in the United Kingdom (from -14 to -3).

QA22. Would you say that you are very optimistic, fairly optimistic, fairly pessimistic or very pessimistic about the future of the EU?



For this question, as for most of the indicators of support, **there are significant differences between socio-demographic categories**: a majority of students (65%), managers (62%), those who studied the longest (59%), those who do not have financial difficulties (58%) and those who place themselves at the top of the social scale (63%) are optimistic about the future of the EU.

In contrast, a majority of those who left school at the age of 15 or earlier (53%), unemployed people (52%), those who regularly struggle to pay their bills (63%) and those who place themselves at the bottom of the social scale (54%) are pessimistic about the future of the EU.

Optimism about the future of the EU also decreases in line with age: 59% of 15-24 year-olds, 55% of 25-39 year-olds, 50% of 40-54 year-olds and 46% of the 55-plus age group.

QA22. Would you say that you are very optimistic, fairly optimistic, fairly pessimistic or very pessimistic about the future of the EU?

	Total 'Optimistic'	Total 'Pessimistic'	Don't know
EU28	51%	43%	6%
Gender			
Man	53%	42%	5%
Woman	49%	44%	7%
Age			
15-24	59%	35%	6%
25-39	55%	40%	5%
40-54	50%	44%	6%
55 +	46%	47%	7%
Education (End of)			
15-	39%	53%	8%
16-19	48%	46%	6%
20+	59%	37%	4%
Still studying	65%	30%	5%
Socio-professional category			
Self-employed	51%	43%	6%
Managers	62%	35%	3%
Other white collars	55%	40%	5%
Manual workers	50%	44%	6%
House persons	45%	48%	7%
Unemployed	42%	52%	6%
Retired	47%	46%	7%
Students	65%	30%	5%
Difficulties paying bills			
Most of the time	31%	63%	6%
From time to time	46%	47%	7%
Almost never/ Never	58%	37%	5%
Self-positioning on the social staircase			
Low (1-4)	39%	54%	7%
Medium (5-6)	52%	42%	6%
High (7-10)	63%	33%	4%
Euro			
For	66%	30%	4%
Against	34%	60%	6%
Trust in EU			
Tend to trust	82%	15%	3%
Tend not to trust	36%	59%	5%
Image of EU			
Positive	83%	14%	3%
Neutral	49%	42%	9%
Negative	20%	77%	3%

The following table shows the results by socio-demographic criteria in the whole of the European Union (EU28) on average, in the six largest EU countries and in four countries which have been particularly badly affected by the economic crisis.

QA22. Would you say that you are very optimistic, fairly optimistic, fairly pessimistic or very pessimistic about the future of the EU?

Total 'Optimistic'

	EU28	DE	ES	FR	IT	PL	UK	EL	PT	IE	CY
	51%	60%	48%	40%	40%	66%	45%	29%	31%	67%	29%
Gender											
Male	53%	62%	49%	46%	39%	66%	49%	32%	34%	67%	32%
Female	49%	59%	47%	34%	41%	67%	41%	27%	28%	67%	27%
Age											
15-24	59%	57%	54%	47%	48%	83%	57%	42%	49%	64%	36%
25-39	55%	62%	51%	41%	42%	71%	49%	28%	34%	68%	32%
40-54	50%	61%	54%	33%	42%	65%	42%	29%	29%	68%	20%
55 +	46%	61%	38%	39%	34%	54%	41%	24%	24%	68%	29%
Education (End of)											
15-	39%	49%	42%	32%	32%	45%	35%	18%	23%	56%	20%
16-19	48%	58%	47%	33%	40%	62%	42%	26%	34%	60%	20%
20+	59%	72%	57%	44%	46%	72%	55%	36%	49%	78%	39%
Still studying	65%	62%	57%	62%	54%	85%	61%	49%	49%	76%	44%
Socio-professional category											
Self-employed	51%	62%	57%	31%	38%	66%	49%	31%	42%	73%	15%
Managers	62%	68%	61%	57%	50%	70%	49%	46%	48%	78%	57%
Other white collars	55%	63%	67%	24%	51%	73%	42%	28%	45%	72%	34%
Manual workers	50%	57%	50%	38%	34%	71%	41%	29%	31%	66%	23%
House persons	45%	57%	35%	28%	34%	66%	46%	20%	26%	61%	17%
Unemployed	42%	43%	45%	27%	28%	60%	48%	22%	21%	58%	17%
Retired	47%	61%	39%	39%	37%	54%	41%	28%	23%	61%	34%
Students	65%	62%	57%	62%	54%	85%	61%	49%	49%	76%	44%

STANDARD EUROBAROMETER 80
Public opinion in the European Union
TECHNICAL SPECIFICATIONS

Between the 2nd and the 17th of November 2013, TNS opinion & social, a consortium created between TNS plc and TNS opinion, carried out the wave 80.1 of the EUROBAROMETER survey, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, “Strategy, Corporate Communication Actions and Eurobarometer” unit.

The wave 80.1 is the STANDARD EUROBAROMETER 80 survey and covers the population of the respective nationalities of the European Union Member States, resident in each of the Member States and aged 15 years and over.
The STANDARD EUROBAROMETER 80 survey has also been conducted in the five candidate countries (Turkey, the Former Yugoslav Republic of Macedonia, Iceland, Montenegro and Serbia) and in the Turkish Cypriot Community. In these countries, the survey covers the national population of citizens and the population of citizens of all the European Union Member States that are residents in these countries and have a sufficient command of the national languages to answer the questionnaire.

The basic sample design applied in all states is a multi-stage, random (probability) one. In each country, a number of sampling points was drawn with probability proportional to population size (for a total coverage of the country) and to population density.

In order to do so, the sampling points were drawn systematically from each of the "administrative regional units", after stratification by individual unit and type of area. They thus represent the whole territory of the countries surveyed according to the EUROSTAT NUTS II (or equivalent) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas. In each of the selected sampling points, a starting address was drawn, at random. Further addresses (every Nth address) were selected by standard "random route" procedures, from the initial address. In each household, the respondent was drawn, at random (following the "closest birthday rule"). All interviews were conducted face-to-face in people's homes and in the appropriate national language. As far as the data capture is concerned, CAPI (*Computer Assisted Personal Interview)* was used in those countries where this technique was available.

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from Eurostat population data or from national statistics offices. For all countries surveyed, a national weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. In all countries, gender, age, region and size of locality were introduced in the iteration procedure. For international weighting (i.e. EU averages), TNS Opinion & Social applies the official population figures as provided by EUROSTAT or national statistic offices. The total population figures for input in this post-weighting procedure are listed below.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

Statistical Margins due to the sampling process
(at the 95% level of confidence)

various sample sizes are in rows *various observed results are in columns*

	5% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%	
N=50	6,0	8,3	9,9	11,1	12,0	12,7	13,2	13,6	13,8	13,9	N=50
N=500	1,9	2,6	3,1	3,5	3,8	4,0	4,2	4,3	4,4	4,4	N=500
N=1000	1,4	1,9	2,2	2,5	2,7	2,8	3,0	3,0	3,1	3,1	N=1000
N=1500	1,1	1,5	1,8	2,0	2,2	2,3	2,4	2,5	2,5	2,5	N=1500
N=2000	1,0	1,3	1,6	1,8	1,9	2,0	2,1	2,1	2,2	2,2	N=2000
N=3000	0,8	1,1	1,3	1,4	1,5	1,6	1,7	1,8	1,8	1,8	N=3000
N=4000	0,7	0,9	1,1	1,2	1,3	1,4	1,5	1,5	1,5	1,5	N=4000
N=5000	0,6	0,8	1,0	1,1	1,2	1,3	1,3	1,4	1,4	1,4	N=5000
N=6000	0,6	0,8	0,9	1,0	1,1	1,2	1,2	1,2	1,3	1,3	N=6000
N=7000	0,5	0,7	0,8	0,9	1,0	1,1	1,1	1,1	1,2	1,2	N=7000
N=7500	0,5	0,7	0,8	0,9	1,0	1,0	1,1	1,1	1,1	1,1	N=7500
N=8000	0,5	0,7	0,8	0,9	0,9	1,0	1,0	1,1	1,1	1,1	N=8000
N=9000	0,5	0,6	0,7	0,8	0,9	0,9	1,0	1,0	1,0	1,0	N=9000
N=10000	0,4	0,6	0,7	0,8	0,8	0,9	0,9	1,0	1,0	1,0	N=10000
N=11000	0,4	0,6	0,7	0,7	0,8	0,9	0,9	0,9	0,9	0,9	N=11000
N=12000	0,4	0,5	0,6	0,7	0,8	0,8	0,9	0,9	0,9	0,9	N=12000
N=13000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,9	0,9	N=13000
N=14000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,8	0,8	N=14000
N=15000	0,3	0,5	0,6	0,6	0,7	0,7	0,8	0,8	0,8	0,8	N=15000
	5% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%	

ABBR.	COUNTRIES	INSTITUTES	N° INTERVIEWS	DATES FIELDWORK		POPULATION 15+	PROPORTION EU28
BE	Belgium	TNS Dimarso	1.063	2/11/13	17/11/13	8.939.546	2,16%
BG	Bulgaria	TNS BBSS	1.027	2/11/13	11/11/13	6.537.510	1,58%
CZ	Czech Rep.	TNS Aisa	1.000	2/11/13	13/11/13	9.012.443	2,18%
DK	Denmark	TNS Gallup DK	1.001	2/11/13	17/11/13	4.561.264	1,10%
DE	Germany	TNS Infratest	1.543	2/11/13	17/11/13	64.336.389	15,57%
EE	Estonia	TNS Emor	1.004	2/11/13	17/11/13	945.733	0,23%
IE	Ireland	IMS Millward Brown	1.004	3/11/13	17/11/13	3.522.000	0,85%
EL	Greece	TNS ICAP	1.000	2/11/13	16/11/13	8.693.566	2,10%
ES	Spain	TNS Spain	1.012	2/11/13	17/11/13	39.127.930	9,47%
FR	France	TNS Sofres	1.027	2/11/13	17/11/13	47.756.439	11,56%
HR	Croatia	Puls	1.000	2/11/13	16/11/13	3.749.400	0,91%
IT	Italy	TNS Italia	1.000	2/11/13	14/11/13	51.862.391	12,55%
CY	Rep. Of Cyprus	Synovate	503	2/11/13	17/11/13	838.897	0,20%
LV	Latvia	TNS Latvia	1.007	2/11/13	17/11/13	1.447.866	0,35%
LT	Lithuania	TNS LT	1.030	2/11/13	17/11/13	2.829.740	0,69%
LU	Luxembourg	TNS ILReS	508	2/11/13	12/11/13	434.878	0,11%
HU	Hungary	TNS Hoffmann	1.000	2/11/13	17/11/13	8.320.614	2,01%
MT	Malta	MISCO	500	2/11/13	17/11/13	335.476	0,08%
NL	Netherlands	TNS NIPO	1.019	2/11/13	17/11/13	13.371.980	3,24%
AT	Austria	Österreichisches Gallup-Institut	1.032	2/11/13	17/11/13	7.009.827	1,70%
PL	Poland	TNS Polska	1.000	2/11/13	17/11/13	32.413.735	7,85%
PT	Portugal	TNS Portugal	1.047	2/11/13	17/11/13	8.414.215	2,04%
RO	Romania	TNS CSOP	1.069	2/11/13	12/11/13	18.246.731	4,42%
SI	Slovenia	RM PLUS	1.086	3/11/13	17/11/13	1.759.701	0,43%
SK	Slovakia	TNS Slovakia	1.000	2/11/13	17/11/13	4.549.955	1,10%
FI	Finland	TNS Gallup	1.002	2/11/13	17/11/13	4.440.004	1,07%
SE	Sweden	TNS Sifo	1.019	2/11/13	17/11/13	7.791.240	1,89%
UK	United Kingdom	TNS UK	1.326	2/11/13	17/11/13	51.848.010	12,55%
TOTAL EU28			27.829	2/11/13	17/11/13	413.097.480	100%*
CY(tcc)	Turkish Cypriot Comm.	Kadem	500	2/11/13	17/11/13	143.226	
TR	Turkey	TNS PIAR	1.001	2/11/13	17/11/13	54.844.406	
MK	Former Yugoslav Rep. Of Macedonia	TNS Brima	1.048	2/11/13	8/11/13	1.678.404	
IS	Iceland	Capacent	500	2/11/13	17/11/13	252.277	
ME	Montenegro	TNS Medium Gallup	499	2/11/13	17/11/13	492.265	
RS	Serbia	TNS Medium Gallup	1.034	2/11/13	17/11/13	6.409.693	
TOTAL			32.411	2/11/13	17/11/13	476.917.751	

* It should be noted that the total percentage shown in this table may exceed 100% due to rounding