European Commission

Standard Eurobarometer 76
Autumn 2011

PUBLIC OPINION IN THE EUROPEAN UNION

REPORT

Fieldwork: Autumn 2011

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 76 / Autumn 2011 – TNS Opinion & Social

Eurobarometer

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PUBLIC OPINION IN THE EUROPEAN UNION

Conducted by TNS Opinion & Social at the request of the European Commission –
Directorate-General Communication

Coordinated by the European Commission –Directorate-General Communication

PRESENTATION

This Standard Eurobarometer survey was carried out between 5 and 20 November 2011 in 33 countries and territories[1]: the 27 Member States of the European Union, the five candidate countries (Croatia, the Former Yugoslav Republic of Macedonia, Turkey, Iceland and Montenegro), as well as the Turkish Cypriot Community in the part of the country not controlled by the government of the Republic of Cyprus.

After several surveys marked by a worsening of the indicators used to measure perceptions of the economic situation and the job market, the Standard Eurobarometer surveys had recorded, in autumn 2010 (EB74) and again in spring 2011 (EB75), a recovery in a certain number of indicators – in particular those measuring changes in perceptions of the economic situation. However, that trend has been reversed in the Standard Eurobarometer survey carried out in autumn 2011 (EB76).

As was the case in previous surveys, the results reveal significant cleavages in public opinion in the various EU Member States, in particular on questions relating to the economy. The results also show that the way in which Europeans perceive the situation of their household and their job situation is relatively stable. However, citizens in the European Union are far less optimistic in their assessment of the European economy and the economic outlook at national, European and world levels. Levels of trust in national and European political institutions have also fallen sharply. Despite these changes, Europeans still consider that the European Union is the institution best able to take effective action against the effects of the crisis.

This survey was carried out against a backdrop of strong media coverage of EU policy issues. The fieldwork began after the European Council meetings of 23 and 26 October 2011 and coincided with the G20 Summit of 3 and 4 November in Cannes. During the fieldwork, new prime ministers were appointed in Greece (10 November) and Italy (16 November), and this period also coincided with preparations for the Spanish general elections (20 November).

On 10 November 2011, the European Commission published its economic forecasts[2] for 2012, reducing its GDP growth forecasts to 0.5% for the eurozone and 0.6% for the European Union as a whole.

The fieldwork was completed on 20 November, well before the European Council meeting of 8-9 December at which decisions were adopted with a view to improving economic governance within the European Union[3] [4].

[1] Please consult the technical specifications for the exact fieldwork dates in each country.
[2] See IP/11/1331 and http://ec.europa.eu/economy_finance/publications/european_economy/2011/pdf/ee-2011-6_en.pdf (in English).
[3] http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/ec/126714.pdf
[4] http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/ec/126658.pdf

The full Standard Eurobarometer report consists of several volumes: the first part analyses the results of the historical indicators of the Standard Eurobarometer. The second part examines in detail the opinions and attitudes of Europeans concerning the Europe 2020 strategy. The third part of the report is then devoted to the state of European public opinion with regard to the financial and economic crisis. Finally, the last part of the report analyses media habits in the European Union.

The general analysis and the socio-demographic analyses are based on the average results in the 27 Member States. This average is weighted so that it reflects the actual population of each Member State. The averages for previous years 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 Eurobarometer surveys of the Directorate-General Communication ("Research and Speechwriting" Unit). A technical note concerning the interviews conducted by the member institutes of the TNS Opinion & Social network is annexed to this report. It also includes information on the interview method and the confidence intervals[5].

The Eurobarometer website can be consulted at the following address:
http://ec.europa.eu/public_opinion/index_en.htm
We wish to thank the people interviewed throughout Europe
who devoted their time to participate in this survey.
Without their active participation, this survey would not have been possible.

***

[5] 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 respondent has the possibility to choose several answers to the same question.

In this report, the countries are referred to by the following abbreviations.

ABBREVIATIONS	
EU27	European Union – 27 Member States
EU15	"EU15 countries"*
NMS12	"NMS12 countries"**
Eurozone	Belgium, Germany, Greece, Spain, France, Ireland, Italy, Luxembourg, Malta, the Netherlands, Austria, Portugal, Slovakia, Slovenia, Finland, Estonia, Republic of Cyprus
Non-Eurozone	Bulgaria, Czech Republic, Denmark, Lithuania, Latvia, Hungary, Poland, Romania, Sweden, United Kingdom
DK/NA	Don't Know/No answer
BE	Belgium
BG	Bulgaria
CZ	Czech Republic
DK	Denmark
DE	Germany
EE	Estonia
EL	Greece
ES	Spain
FR	France
IE	Ireland
IT	Italy
CY	Republic of Cyprus***
CY (tcc)	Zone not controlled by government of the Republic of Cyprus
LT	Lithuania
LV	Latvia
LU	Luxembourg
HU	Hungary
MT	Malta
NL	The Netherlands
AT	Austria
PL	Poland
PT	Portugal
RO	Romania
SI	Slovenia
SK	Slovakia
FI	Finland
SE	Sweden
UK	United Kingdom
HR	Croatia
TR	Turkey
MK	Former Yugoslav Republic of Macedonia****
IS	Iceland
ME	Montenegro

* The EU15 countries are the 15 countries that joined the European Union before the 2004 and 2007 enlargements, namely Belgium, Denmark, Germany, Greece, Spain, France, Ireland, Italy, Luxembourg, the Netherlands, Austria, Portugal, Finland, Sweden and the United Kingdom.
** The NMS12 countries are the 12 "New Member States" that joined the European Union at the time of the 2004 and 2007 enlargements, namely Bulgaria, the Czech Republic, Estonia, the Republic of Cyprus, Lithuania, Latvia, Hungary, Malta, Poland, Romania, Slovenia and Slovakia.
*** Cyprus as a whole is one of the 27 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 EU27 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.

PUBLIC OPINION IN THE EUROPEAN UNION

I. LIFE IN THE EUROPEAN UNION

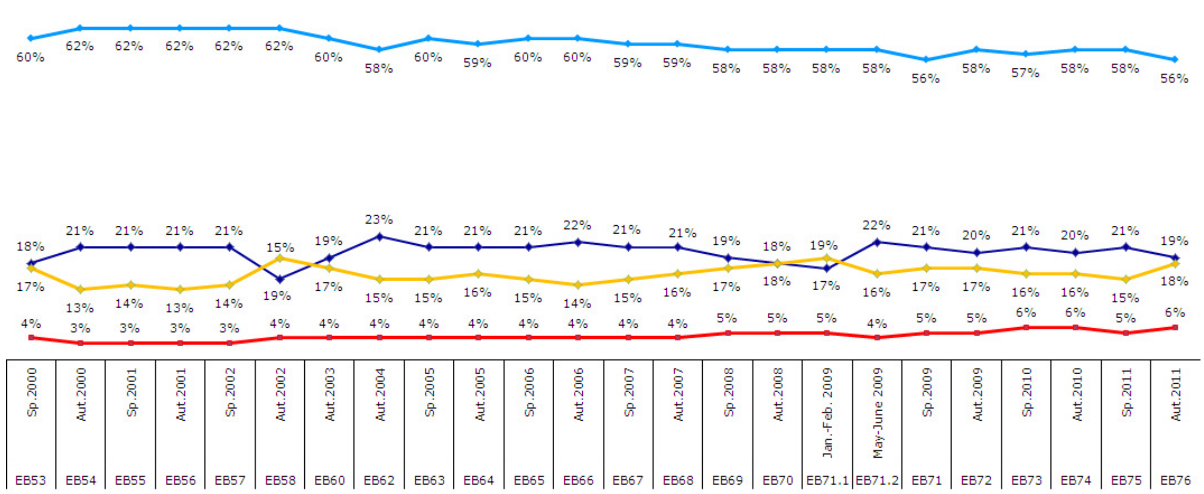
1. PERSONAL ASPECTS

1.1 The personal situation of Europeans

– Europeans are still satisfied with their lives, but negative opinions and pessimism have gained ground –

A clear majority of Europeans are still satisfied with their lives (75%). However this percentage has fallen since the previous Standard Eurobarometer (EB75) conducted in spring 2011 (-4 percentage points) and almost a quarter of Europeans are now dissatisfied (24%, +4)[6].

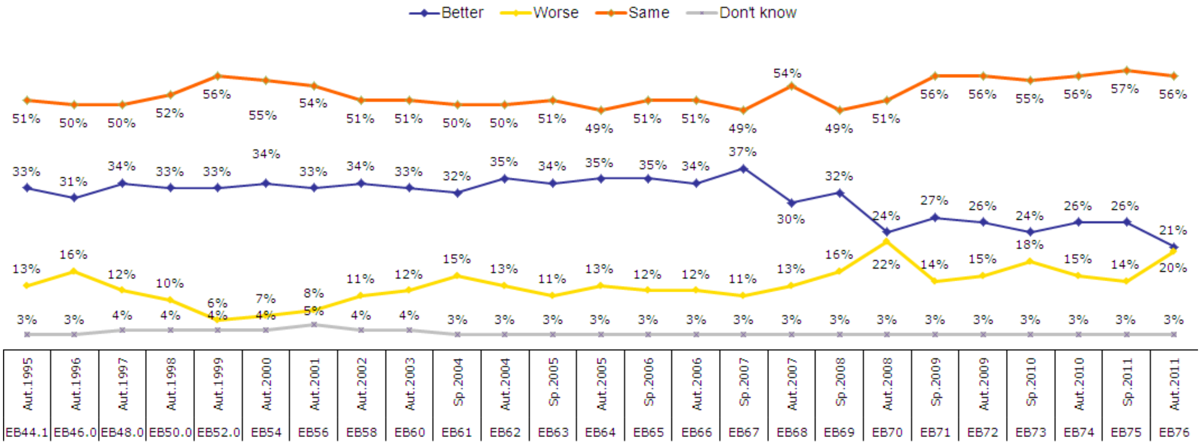
QA1 On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the life you lead?



Europeans are also slightly more pessimistic about the future: although a majority of respondents still believe that their life in general will not change over the next twelve months (56%, -1), the proportion of those who think that it will be "worse" has increased (20%, +6, whereas 21% think that it will be "better", -5)[7].

[6] QA1 On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the life you lead?
[7] QA5a What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

QA5a.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



A majority of respondents are positive about their current personal situation in 23 of the 27 Member States, the exceptions being Hungary, Portugal, Bulgaria and Greece.

Looking ahead over the next twelve months, the optimism index[8] is negative in 11 Member States (Romania, -1; Ireland, -1; Bulgaria, -2; Slovenia, -6; Slovakia, -6; Poland, -7; Cyprus, -9; the Czech Republic, -19; Hungary, -30; Portugal, -44 and Greece, -52); in EB75 of spring 2011, it was negative in only five Member States.

[8] Index which translates the difference between optimistic and pessimistic forecasts for the next twelve months in a country (if it is positive, that means that optimism outweighs pessimism and vice versa).

QA5.1 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 EB75 Sp.2011	Better - Worse EB76 Aut.2011	Diff Aut.2011-Sp.2011
EU27	+12	+1	**-11**
RO	-8	-1	**+7**
LV	+14	+17	**+3**
BG	+2	-2	**-4**
MT	+7	+3	**-4**
DK	+30	+24	**-6**
IT	+7	+1	**-6**
LT	+10	+4	**-6**
DE	+13	+5	**-8**
IE	+7	-1	**-8**
AT	+9	+1	**-8**
CZ	-9	-19	**-10**
LU	+20	+9	**-11**
SI	+5	-6	**-11**
SE	+46	+35	**-11**
PL	+5	-7	**-12**
UK	+21	+9	**-12**
FI	+29	+16	**-13**
EE	+27	+13	**-14**
EL	-36	-52	**-16**
ES	+20	+4	**-16**
FR	+25	+8	**-17**
CY	+8	-9	**-17**
HU	-13	-30	**-17**
BE	+21	=	**-21**
NL	+27	+5	**-22**
PT	-22	-44	**-22**
SK	+9	-15	**-24**
CY (tcc)	+10	+19	**+9**
HR	+7	+5	**-2**
TR	-1	-5	**-4**
MK	+15	+26	**+11**
IS	+44	+37	**-7**
ME	+33	+37	**+4**

The following facts are noteworthy:

- Personal satisfaction has declined the most significantly since EB75 in Greece (37%, -9 percentage points), Italy (64%, -10) and France (76%, -7). However, levels of satisfaction remain high.

- Pessimism about the future has increased not only in countries where the optimism index is below the European average, but also in countries where the index is positive. The optimism index has fallen the most sharply in Slovakia (-24 percentage points to an index of -15), Portugal (-22 to -44), but also in the Netherlands (-22 to +5) and Belgium (-21 to a neutral index).

- Respondents in Greece are the most pessimistic about the future, with a further deterioration since spring 2011 (-16 percentage points to -52).

- Romania and Latvia are the only two countries to have recorded an increase in satisfaction among respondents about both their current personal situation (50%, +10, and 62%, +2, respectively) and their future prospects (optimism index up by 7 percentage points, to -1, and by 3 percentage points, to +17 respectively).

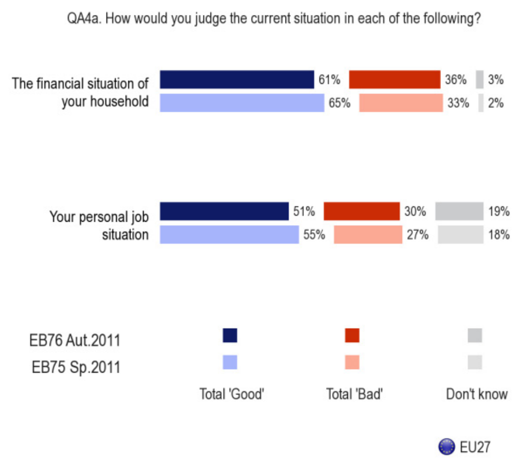
1.2 Assessment of the professional and financial situation

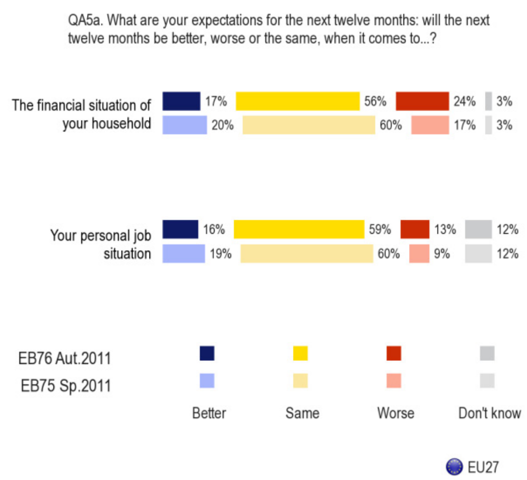
- Europeans are also less positive about their job situation and the financial health of their household -

Just over six out of ten Europeans consider that the financial situation of their household is "good" (61%, versus 36% who consider that it is "bad")[9]. **However, this proportion has fallen by 4 percentage points** since EB75 of spring 2011. **Europeans are also more negative about the outlook for the next twelve months:** although a majority of respondents still believe that the situation will stay the same (56%, -4), the proportion of those who think that it will be "worse" has increased significantly (24%, +7) and now exceeds that of optimists (only 17% think that the financial situation of their household will be "better" over the next twelve months).[10]

A majority of respondents are negative about the financial situation of their household in six Member States (Lithuania, Romania, Portugal, Bulgaria, Hungary and Greece). Positive opinions have fallen the most sharply since spring 2011 in Greece (24%, -12) and Italy (51%, -9).

As regards the outlook for the next twelve months, the optimism index is now negative in 19 Member States; the exceptions are Spain (with a neutral index), Lithuania, Luxembourg, Finland, Estonia, Latvia, Denmark and Sweden.





In terms of changes, this index has declined in all Member States except for Romania. It has declined the most significantly since EB75 of spring 2011 in Slovakia (-25 percentage points), Cyprus (-19), the Netherlands (-18), Portugal (-18), Hungary (-17) and France (-16).

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[9] QA4a How would you judge the current situation in each of the following?

[10] QA5a What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?

In the candidate countries, optimism has increased in the Former Yugoslav Republic of Macedonia (+14 percentage points, with an index of +18) and Croatia (+2 percentage points, with a neutral index), but the others have followed the European trend, with an increase in pessimism.

Europeans are positive about their job situation, but less so than six months earlier (51% consider that it is "good", -4 percentage points, versus 30% for whom it is "bad", +3). A majority of respondents are negative on this subject in five Member States (Portugal, Romania, Bulgaria, Hungary and Greece).

A majority of Europeans think that their job situation will not change over the next twelve months (59%, -1), although the proportion of respondents who think that it will be "worse" has increased (13%, +4). Only 16% of Europeans (-3) think that their job situation will improve over the next twelve months.

Optimism has gained ground in Romania and Latvia. Greece is once again one of the countries in which the optimism index has deteriorated the most (-11 percentage points), along with Estonia (-11), Poland (-11), Italy (-12), Portugal (-13) and Slovakia (-14).

There are strong socio-demographic divisions within all these personal satisfaction indicators. For example, the most educated respondents and those who almost never have difficulties paying their bills are, on average, more satisfied than the others. Managers are also in general more satisfied than employees and manual workers.

	QA4.4 How would you judge the current situation in each of the following?		QA5.3 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	Your personal job situation	The financial situation of your household	Your personal job situation
	Total 'Good'	Total 'Good'	Better	Better
EU27	61%	51%	17%	16%
Gender				
Male	64%	54%	18%	18%
Female	60%	48%	15%	14%
Age				
15-24	63%	47%	28%	32%
25-39	59%	59%	25%	24%
40-54	59%	59%	15%	16%
55 +	65%	41%	7%	4%
Education (End of)				
15-	51%	37%	10%	8%
16-19	59%	52%	17%	16%
20+	74%	64%	19%	19%
Still studying	66%	47%	25%	28%
Respondent occupation scale				
Self- employed	65%	62%	20%	21%
Managers	83%	84%	16%	17%
Other white collars	68%	71%	17%	18%
Manual workers	62%	67%	19%	18%
House persons	53%	34%	15%	11%
Unemployed	27%	12%	28%	34%
Retired	63%	36%	7%	3%
Students	66%	47%	25%	28%
Difficulties paying bills				
Most of the time	15%	23%	20%	19%
From time to time	43%	44%	19%	18%
Almost never	80%	61%	15%	15%

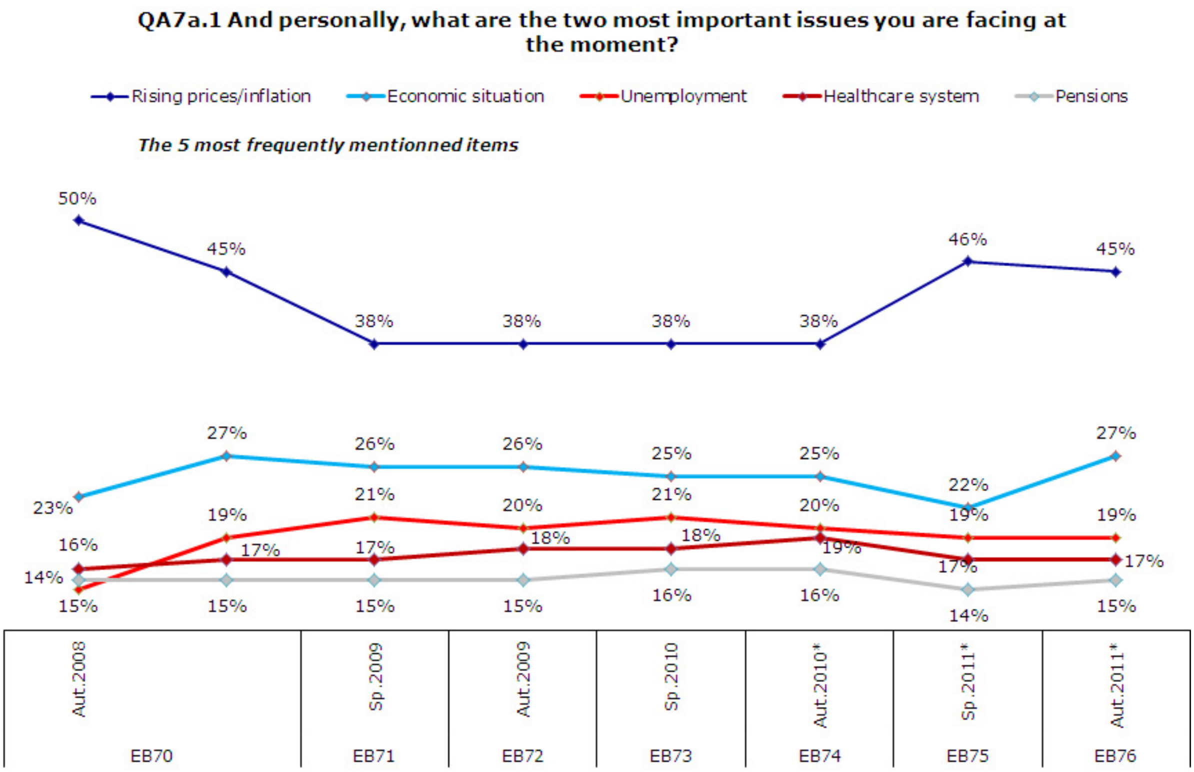
The same trends are perceptible as regards short-term expectations. However, we note that managers are far less optimistic than unemployed people, who are the most likely to believe that the financial situation of their household and their job situation will be better in twelve months.

1.3 The concerns of Europeans

- Inflation is still the number one personal concern, but Europeans are becoming increasingly concerned about the economic situation -

The personal concerns of Europeans continue to be dominated by economic issues.

Europeans still see rising prices as their most pressing concern (45%, -1) after a strong increase in spring 2011[11]. But we note above all that Europeans are once again becoming increasingly concerned about the economic situation (27%, +5, after -3 in spring 2011), with a score in line with that recorded in the Eurobarometer survey carried out in January and February 2009 (EB71.1)[12], just a few months after the bankruptcy of the Lehmann Brothers bank. Unemployment also remains at the forefront of the respondents' concerns (19%, =), followed by healthcare systems (17%, =) and pensions (15%, +1).



The other issues facing Europeans personally are ranked in the following order: taxation (13%, =), education (8%, -2), housing (6%, =), energy (6%, =), crime (5%, -1) and the environment (4%, -2). Finally, immigration (3%, -1), terrorism (1%, -1) and defence (1%, =)[13] continue to be mentioned by very few respondents.

*In EB74, EB75 and EB76 only half of the sample (SPLIT A) was asked this question

[11] It had increased by 8 percentage points to 46% in comparison with EB74 of autumn 2010
[12] Special Eurobarometer 308, The Europeans in 2009: http://ec.europa.eu/public_opinion/archives/ebs/ebs_308_en.pdf
[13] QA7 And personally, what are the two most important issues you are facing at the moment?

Rising prices are the main concern in 22 countries, in particular in Lithuania (62%), the Czech Republic (60%) and Hungary (60%). The changes noted are less striking than in spring 2011 when concerns about this issue had increased significantly. We note however that the number of respondents mentioning this issue has increased by 9 percentage points in Luxembourg (35%) and by 6 percentage points in Estonia (59%).

The economic situation tops the list of concerns in three Member States: Greece, with a significant increase (68%, +12), Cyprus (48%, +3) and Spain (47%, +9, after a decrease of 11 percentage points between autumn 2010 and spring 2011). Concerns about this issue have also increased significantly over the last six months in Italy (41%, +13) and Malta (22%, +11).

As was the case in spring 2011, respondents in Spain (40%, +4) and Ireland (32%, -2) are the most likely to mention **unemployment.**

Healthcare is the number one personal concern of respondents in Sweden where it has gained ground (40%, +6), as well as in the Netherlands (32%, +2) and Finland (32%, +4). Furthermore, concerns about this issue have increased considerably since spring 2011 in Latvia (24%, +8).

Respondents in Malta (30%, +9) are once again very sensitive to the issue of **energy.** Concerns about this issue have also increased significantly in the United Kingdom (12%, +8) and Belgium (17%, +5)

It is noteworthy that, contrary to the trend in the majority of countries, concerns about the economic situation have decreased significantly since spring 2011 in Turkey (34%, -11), as have concerns about unemployment (26%, -17). That is also the case in Iceland, albeit to a lesser extent, as regards both the economic situation (31%, -9) and unemployment (11%, -4).

For the third consecutive six month period, new concerns were tested using a "split ballot" methodology (one half of the sample was asked about a list of concerns identical to the list used regularly for several years, while the other half of the sample was asked about a slightly modified list*).

The ranking of the five main concerns remains identical in both groups, but we note that that Europeans continue to be very preoccupied with **energy costs** (13%, =), which was mentioned more frequently than taxation, education and crime. **Rising personal debt** was mentioned by 4% of the people polled (-1) and **climate change** by 2% (=).

Concerns about "**energy costs"** have increased significantly in Belgium (31%, +21) and are still high in Malta despite a slight fall (27%, -3).

* Compared with the "traditional" question, the new items are "rising personal debt" and "climate change". "Defence and foreign policy" has been replaced by "the external influence of (Your COUNTRY)"and "energy" by "the cost of energy", while "housing" has been omitted.

A socio-demographic analysis reveals that concerns about rising prices and inflation top the list in all categories, except for the unemployed who are above all concerned about unemployment (72%), and students, whose main concern is the educational system (36%).

Self-employed people (41%), house persons (34%), unemployed people (34%, versus 24% of managers and 29% of manual workers) and the people who often struggle to pay their bills (38%) are more likely than Europeans on average to mention the economic situation. The youngest respondents are slightly more preoccupied than the other categories with unemployment (28%, in second place, versus 23-24% of those aged 25 to 54, and 10% of those aged 55 or over).

QA7a1 And personally, what are the two most important issues you are facing at the moment?

	Rising prices\ inflation	Economic situation	Unemployment
EU27	45%	27%	19%
Age			
15-24	37%	25%	28%
25-39	47%	32%	24%
40-54	47%	30%	23%
55 +	45%	22%	10%
Respondent occupation scale			
Self- employed	44%	41%	13%
Managers	38%	24%	9%
Other white collars	51%	29%	16%
Manual workers	53%	29%	17%
House persons	51%	34%	21%
Unemployed	36%	34%	72%
Retired	45%	19%	7%
Students	31%	21%	24%
Difficulties paying bills			
Most of the time	46%	38%	37%
From time to time	49%	34%	23%
Almost never	43%	21%	14%

Top three scores

2. ECONOMIC ASPECTS

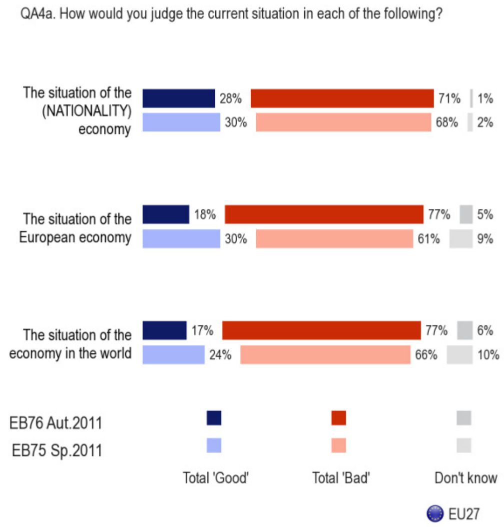
- Europeans are now far more critical of the economic and employment situation, especially at European level -

2.1 Assessment of the current economic situation

2.1.1 The national, European and world economic situation

After an improvement in two successive surveys, in autumn 2010 (EB74) and spring 2011 (EB75), **perceptions of the economic situation at national level have deteriorated slightly** in autumn 2011**:** 28% consider that it is "good" (-2 percentage points) versus 71% who consider that it is "bad" (+3). Above all, more than three out of ten Europeans now consider that the economic situation of their country is "very bad" (31%, +6).

However, the most striking change concerns the way in which respondents perceive the situation of the European economy: 77% of Europeans now consider that it is "bad", i.e. an increase of 16 percentage points since EB75. More than a quarter of them even describe it as "very bad" (27%, +14 percentage points). Only 18% still think that it is "good" (-12). This is the worst score ever recorded for this indicator[14] since it was first used in the Eurobarometer, in November 2004[15].



The trend is similar as regards the world economic situation: 77% of respondents think that it is "bad" (+11 percentage points), while only 17% think that it is "good" (-7). This level of pessimism is therefore very close to the lowest ever score recorded for this indicator in EB71.1 of January and February 2009, when 79% of Europeans described the world economic situation as "bad".

Despite a fall in the number of positive answers, eurozone respondents are still slightly more positive (31%, -3 percentage points) than non-eurozone respondents (22%, -2) about the economic situation in their country. The gap is narrower as regards assessments of the EU economy (17%, -11, in the eurozone consider that it is "good" versus 20%, -13, outside the eurozone).

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[14] To date, the highest negative score was 70%, recorded in the Special Eurobarometer 308 of January and February 2009 (EB71.1) and in EB73 of autumn 2010.
[15] Special Eurobarometer 215: The Lisbon agenda
http://ec.europa.eu/public_opinion/archives/ebs/ebs_215_en.pdf

QA4 How would you judge the current situation in each of the following?

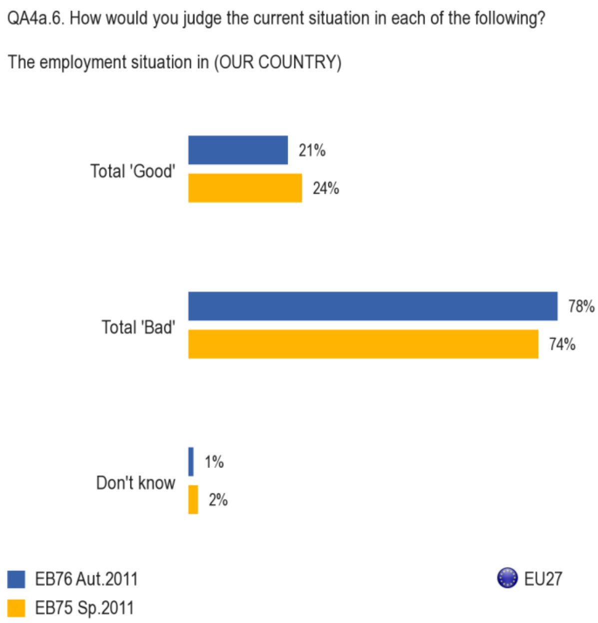
	The situation of the (NATIONALITY) economy		The situation of the European economy		The situation of the economy in the world	
	Total 'Good'	Total 'Bad'	Total 'Good'	Total 'Bad'	Total 'Good'	Total 'Bad'
EU27	28%	71%	18%	77%	17%	77%
EURO ZONE	31%	68%	17%	79%	16%	79%
NON EURO	22%	76%	20%	73%	19%	72%

As regards the national economic situation:
- The most striking changes in perceptions of the national economic situation were recorded in Belgium (30% see it as "good", -24 percentage points) and Austria (62%, -10) where opinions had previously improved very significantly in spring 2011 (increases of +22 and +11 respectively between autumn 2010 and spring 2011).
- Opinions have also deteriorated sharply in Cyprus (21%, -12) and Italy (9%, -11).
- Negative opinions are still above the 90% level in nine Member States (Italy, Latvia, Hungary, Slovenia, Portugal, Bulgaria, Spain, Ireland and Greece).

As regards the European economic situation:
- Negative opinions now outweigh positive ones in all the Member States (whereas a majority of respondents were still positive in six Member States in spring 2011).
- The proportion of respondents who consider that the economic situation of the European Union is bad has increased by more than 20 percentage points since EB75 of spring 2011 in 12 Member States, notably in Estonia (+29 percentage points), Lithuania (+27) and Sweden (+27).
- The most negative countries are Ireland (92% consider the situation to be bad, including 57% who answered "very bad"), Spain (91% and 43%) and Sweden (91% and 31%). The economic situation of the EU is also seen as "very bad" by more than one in two respondents in the United Kingdom (54%).

Opinions in the candidate countries:
- As regards **the national economic situation,** a clear majority of respondents in the Former Yugoslav Republic of Macedonia are negative, even if the number of negative answers has fallen significantly (60%, -16 percentage points). It is also the only country where a majority of respondents are still positive about the **economic situation of the European Union** (51% versus 41%), despite a significant decrease in the proportion of positive answers (-11 percentage points).
- In the other candidate countries, the proportion of respondents who consider that the economic situation of the EU is "bad" has increased significantly (84%, +19 in Iceland; 67%, +18 in Croatia, 65%, +21 in Montenegro and 58%, +12 in Turkey).

2.1.2 The job situation



After having also improved in autumn 2010 (EB74) and spring 2011 (EB75), opinions about the job situation at national level have deteriorated slightly: 21% think that it is "good", i.e. -3 percentage points since spring 2011. **Negative opinions, which were already predominant, have gained further ground (78%, +4).** The proportion of Europeans who think that the job situation in their country is "very bad" is now as high as 39% (+8).

Positive opinions have once again fallen significantly in Belgium (35%,-13), after a sharp improvement in spring 2011[16], as well as in Denmark (30%, -12).

Positive opinions are now in the majority in only six Member States, the same as in spring 2011: Luxembourg (62%), Germany (60%), Austria (60%), the Netherlands (59%), Finland (53%) and Sweden (51%).

Negative opinions are as high as or over 90% in 13 Member States: notably, as in spring 2011, in Slovakia, Lithuania, Latvia, Romania, Hungary, Slovenia, Portugal, Bulgaria, Ireland, Spain and Greece, but also now in Italy and France.

Respondents in the candidate countries are also very critical about the job situation and negative opinions are as high as 97% in Croatia, 89% in Montenegro, 85% in the Former Yugoslav Republic of Macedonia, 76% in Iceland and 70% in Turkey.

[16] 48% of the people polled in Belgium considered that the country's economic situation was "good" in EB75, i.e. +19 percentage points versus EB74.

QA4 How would you judge the current situation in each of the following?

	The situation of the (NATIONALITY) economy		The situation of the European economy		The situation of the economy in the world		The employment situation in (OUR COUNTRY)	
	Total 'Good'	Total 'Bad'	Total 'Good'	Total 'Bad'	Total 'Good'	Total 'Bad'	Total 'Good'	Total 'Bad'
EU27	28%	71%	18%	77%	17%	77%	21%	78%
Gender								
Male	30%	69%	19%	78%	19%	76%	23%	76%
Female	26%	73%	17%	77%	15%	77%	18%	80%
Age								
15-24	28%	70%	23%	70%	21%	71%	21%	77%
25-39	25%	74%	18%	78%	17%	77%	20%	79%
40-54	29%	70%	16%	80%	17%	78%	22%	77%
55 +	29%	70%	16%	77%	15%	77%	19%	79%
Education (End of)								
15-	21%	78%	14%	79%	11%	80%	15%	84%
16-19	26%	73%	18%	77%	17%	77%	20%	79%
20+	36%	63%	19%	78%	20%	75%	25%	73%
Still studying	30%	68%	22%	72%	20%	72%	23%	75%
Respondent occupation scale								
Self- employed	24%	75%	17%	81%	16%	81%	20%	79%
Managers	44%	56%	19%	79%	22%	75%	34%	65%
Other white collars	29%	70%	18%	79%	17%	78%	23%	76%
Manual workers	28%	71%	19%	77%	17%	78%	22%	77%
House persons	20%	79%	15%	78%	14%	78%	14%	84%
Unemployed	16%	83%	15%	79%	14%	78%	7%	91%
Retired	29%	70%	17%	76%	15%	76%	18%	80%
Students	30%	68%	22%	72%	20%	72%	23%	75%
Difficulties paying bills								
Most of the time	11%	88%	13%	82%	12%	81%	6%	93%
From time to time	18%	81%	16%	79%	15%	79%	13%	86%
Almost never	36%	63%	19%	76%	19%	75%	27%	72%

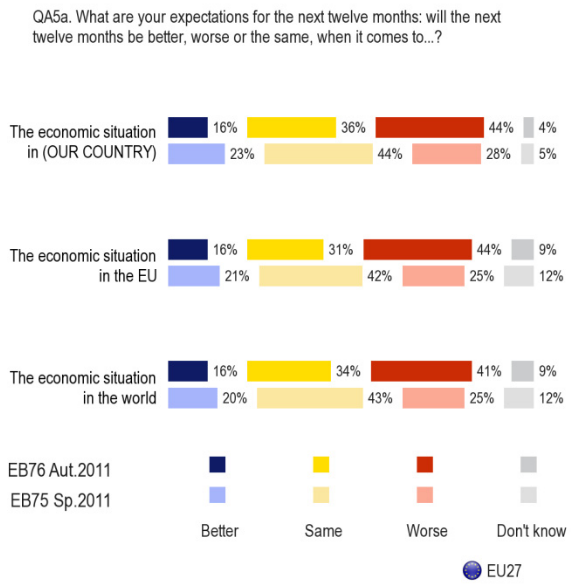
2.2 Expectations for the next twelve months

- Respondents are far more pessimistic about the outlook for the next twelve months -

2.2.1 The national, European and world economic situation

Against a backdrop of increasing pessimism about the economic situation at national, European and world levels, **Europeans are also increasingly pessimistic about the future. This is now the majority opinion, and has overtaken "same".**

- **The next twelve months will be "worse" when it comes to the national economic situation** for 44% of Europeans (+16 percentage points, versus 36% (-8) who think that it will stay "the same" and only 16% (-7) who think that it will be "better").
- This feeling is also shared by **44% of Europeans in the case of the European economic situation** (+19 percentage points, versus 31% (-11) who think that the situation will stay the "same" and 16%, (-5) who think that it will be "better").
- 41% of Europeans are pessimistic as regards the outlook for the **world economic situation** (+16, versus 34% (-9) who do not expect any changes and 16% (-4) who are optimistic).



Whereas, previously, the EU15 countries were less pessimistic than the NMS12 countries[17] about the **economic situation of their country**, opinions are now very similar: 45% of the people polled in the EU15 countries think that the next twelve months will be worse, versus 43% in the NMS12 countries.

However, the EU15 countries are more pessimistic about the outlook for the **European economy** (48%, versus 34% in the NMS12 countries).

Eurozone membership does not seem to be a determinant: 45% of the eurozone respondents are pessimistic about the economic future of both their country and the EU, versus 43% in both cases for non-eurozone respondents.

[17] In EB75 of spring 2011, 26% of the people polled in the EU15 countries thought that the next twelve months would be "worse" as regards the situation of their country's economy, versus 34% in the NMS12 countries.

Whereas the optimism index for the **national economic situation** was still positive in 10 Member States in spring 2011, it is now negative throughout the European Union, except for Estonia where it is neutral, after having deteriorated in 25 of the 27 Member States. It has however improved in two countries: Latvia (the optimism index has risen by 5 percentage points to -2) and Romania (+6 points to -19).

- Respondents in Greece (index down by 2 percentage points to -71) and Portugal (a sharp fall of 13 percentage points to -68) are the most pessimistic about the future of **their country's economy** over the next twelve months.
- The index has deteriorated the most in Germany (index down by 72 percentage points to -56), Sweden (-48 to -21), Denmark (-42 to -4) and Estonia (-41 to -28).

Following a deterioration of the index in all EU countries, only four countries still have a positive index as regards the **economic situation of the EU** (versus nine six months earlier): Lithuania, Romania, Latvia and Bulgaria. Only three of them (versus ten in EB75) still have a positive index as regards the future of the **world economic situation** (Bulgaria, Lithuania and Latvia); the index is neutral in Romania.

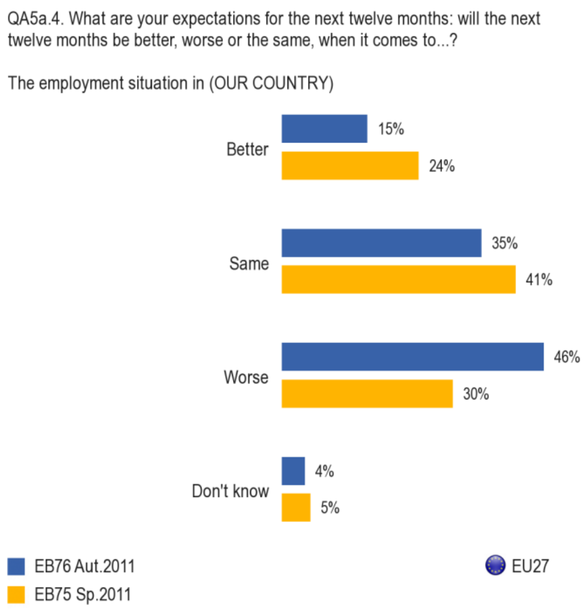
- The countries that are the most pessimistic about the **European Union's economic future** are the Netherlands (index down by 33 percentage points to -65), Portugal (-27 to -56) and Greece (-16 to -53).
- Optimism has fallen the most sharply in Slovakia (index down by 45 percentage points to -46), Cyprus (-41 to -47) and the Czech Republic (-40 to -48).

In the candidate countries, optimism about the **future of the national economy** has increased slightly in Croatia (index up by 2 percentage points to -24) and more markedly in the Former Yugoslav Republic of Macedonia (+14 points to +9). However, the index has fallen in Turkey (-5 percentage points to -7), Iceland (-10 to +20) and Montenegro (-17 to +3). Perceptions of the **future of the economic situation of the European Union** have deteriorated in all the candidate countries.

QA5 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)			The economic situation in the EU			The economic situation in the world		
	Better - Worse EB75 Sp.2011	Better - Worse EB76 Aut.2011	Diff Aut.2011-Sp.2011	Better - Worse EB75 Sp.2011	Better - Worse EB76 Aut.2011	Diff Aut.2011-Sp.2011	Better - Worse EB75 Sp.2011	Better - Worse EB76 Aut.2011	Diff Aut.2011-Sp.2011
EU27	-5	-28	**-23**	-4	-28	**-24**	-5	-25	**-20**
BE	+7	-32	**-39**	-2	-37	**-35**	-13	-39	**-26**
BG	-3	-14	**-11**	+34	+7	**-27**	+28	+6	**-22**
CZ	-29	-60	**-31**	-8	-48	**-40**	-9	-44	**-35**
DK	+38	-4	**-42**	+13	-19	**-32**	+20	-6	**-26**
DE	+13	-28	**-41**	-21	-42	**-21**	-14	-35	**-21**
EE	+30	=	**-30**	+23	-12	**-35**	+20	-5	**-25**
IE	-19	-31	**-12**	-4	-33	**-29**	=	-27	**-27**
EL	-69	-71	**-2**	-37	-53	**-16**	-44	-53	**-9**
ES	+4	-16	**-20**	+23	-6	**-29**	+15	-6	**-21**
FR	-5	-29	**-24**	-8	-29	**-21**	-7	-27	**-20**
IT	-10	-22	**-12**	=	-12	**-12**	-3	-14	**-11**
CY	-21	-52	**-31**	-6	-47	**-41**	-20	-50	**-30**
LV	-7	-2	**+5**	+20	+6	**-14**	+18	+9	**-9**
LT	-3	-13	**-10**	+25	+2	**-23**	+26	+7	**-19**
LU	+6	-26	**-32**	-26	-44	**-18**	-32	-43	**-11**
HU	-27	-46	**-19**	-2	-22	**-20**	-1	-20	**-19**
MT	-4	-18	**-14**	=	-15	**-15**	-9	-16	**-7**
NL	+16	-56	**-72**	-32	-65	**-33**	-12	-46	**-34**
AT	+20	-14	**-34**	+7	-23	**-30**	+9	-19	**-28**
PL	-13	-21	**-8**	+6	-18	**-24**	+2	-18	**-20**
PT	-55	-68	**-13**	-29	-56	**-27**	-28	-55	**-27**
RO	-25	-19	**+6**	+10	+4	**-6**	+5	=	**+5**
SI	-28	-40	**-12**	=	-21	**-21**	-5	-23	**-18**
SK	-12	-51	**-39**	-1	-46	**-45**	-4	-47	**-43**
FI	+6	-31	**-37**	-21	-50	**-29**	-9	-38	**-29**
SE	+27	-21	**-48**	-7	-39	**-32**	+1	-24	**-25**
UK	-5	-29	**-24**	-9	-44	**-35**	-6	-34	**-28**
CY (tcc)	-17	-26	**+9**	+11	-4	**-15**	+5	-30	**-35**
HR	+26	-24	**-50**	+13	-6	**-19**	+10	-6	**-16**
TR	+2	-7	**-9**	-11	-23	**-12**	-13	-26	**-13**
MK	+5	+9	**+4**	+33	+18	**-15**	+27	+16	**-11**
IS	-30	+20	**+50**	+3	-23	**-26**	+15	-12	**-27**
ME	-20	+3	**+23**	+31	+18	**-13**	+30	+19	**-11**

2.2.2 The job situation



Pessimism has increased equally strongly as regards the job situation at national level: more than four out of ten Europeans now consider that the next twelve months will be "worse" (46% (+16) versus 35% (-6) "the same" and 15% (-9_ "better"). At the time of the last survey in spring 2011 (EB75), "same" (41%) was the majority opinion.

Compared with spring 2011, when it was positive in eight Member States, the optimism index is now positive in only two Member States: Denmark (+2) and Latvia (+3), where the index has become positive after an increase of 6 percentage points.

As for the other indicators, respondents in Greece (-76) and Portugal (-71) are the most pessimistic, but the most striking changes have occurred in countries which had previously seemed less prone to pessimism: the optimism index has fallen by 69 percentage points in the Netherlands (to -52), by 61 percentage points in Sweden (to -25), by 49 percentage points in Belgium (to -37), by 43 percentage points in Denmark (to +2) and by 42 percentage points in Finland (to -29). It has also fallen by 40 percentage points in Slovakia (to -51).

As was the case for future expectations regarding the national economic situation, Latvia (index up by 6 percentage points to +3) and Romania (+5 points to -22) are the only two Member States where respondents are more positive about the jobs outlook in their country.

Among the candidate countries, Iceland continues to stand out from the others with an optimism index for the job situation considerably above the European average (an index of +23, despite a fall of 6 percentage points). In Montenegro, the optimism index is now negative after a fall of 17 percentage points (to -5).

QA5 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)			The economic situation in the EU			The economic situation in the world			The employment situation in (OUR COUNTRY)		
	Better	Same	Worse	Better	Same	Worse	Better	Same	Worse	Better	Same	Worse
EU27	16%	36%	44%	16%	31%	44%	16%	34%	41%	15%	35%	46%
Gender												
Male	17%	35%	45%	17%	30%	46%	17%	34%	42%	16%	34%	47%
Female	15%	36%	44%	15%	31%	43%	15%	33%	41%	15%	35%	45%
Age												
15-24	23%	36%	35%	24%	33%	34%	23%	36%	31%	22%	38%	35%
25-39	18%	35%	44%	18%	33%	42%	19%	35%	38%	17%	35%	45%
40-54	15%	35%	47%	15%	30%	48%	15%	32%	45%	13%	34%	50%
55 +	13%	37%	46%	12%	30%	48%	12%	33%	44%	13%	34%	49%
Education (End of)												
15-	14%	37%	44%	14%	33%	41%	14%	34%	40%	13%	35%	47%
16-19	16%	35%	46%	16%	31%	45%	16%	32%	43%	15%	34%	47%
20+	15%	36%	46%	16%	29%	50%	16%	35%	42%	15%	35%	47%
Still studying	24%	37%	34%	24%	32%	35%	23%	37%	31%	23%	40%	32%
Respondent occupation scale												
Self- employed	17%	32%	48%	17%	30%	48%	17%	32%	44%	16%	32%	49%
Managers	15%	37%	46%	16%	26%	54%	16%	34%	46%	14%	37%	47%
Other white collars	16%	34%	47%	17%	29%	47%	17%	34%	42%	14%	34%	49%
Manual workers	16%	36%	44%	16%	32%	43%	16%	34%	41%	15%	36%	46%
House persons	14%	35%	45%	14%	32%	41%	15%	34%	39%	15%	33%	46%
Unemployed	20%	32%	45%	19%	35%	37%	20%	34%	37%	19%	30%	47%
Retired	13%	37%	45%	12%	30%	47%	12%	32%	44%	12%	34%	49%
Students	24%	37%	34%	24%	32%	35%	23%	37%	31%	23%	40%	32%
Difficulties paying bills												
Most of the time	13%	30%	53%	14%	30%	46%	14%	32%	44%	13%	28%	55%
From time to time	16%	33%	47%	16%	32%	43%	16%	33%	42%	15%	33%	48%
Almost never	17%	37%	42%	16%	30%	46%	17%	34%	40%	16%	37%	44%

2.3 The main concerns at national level

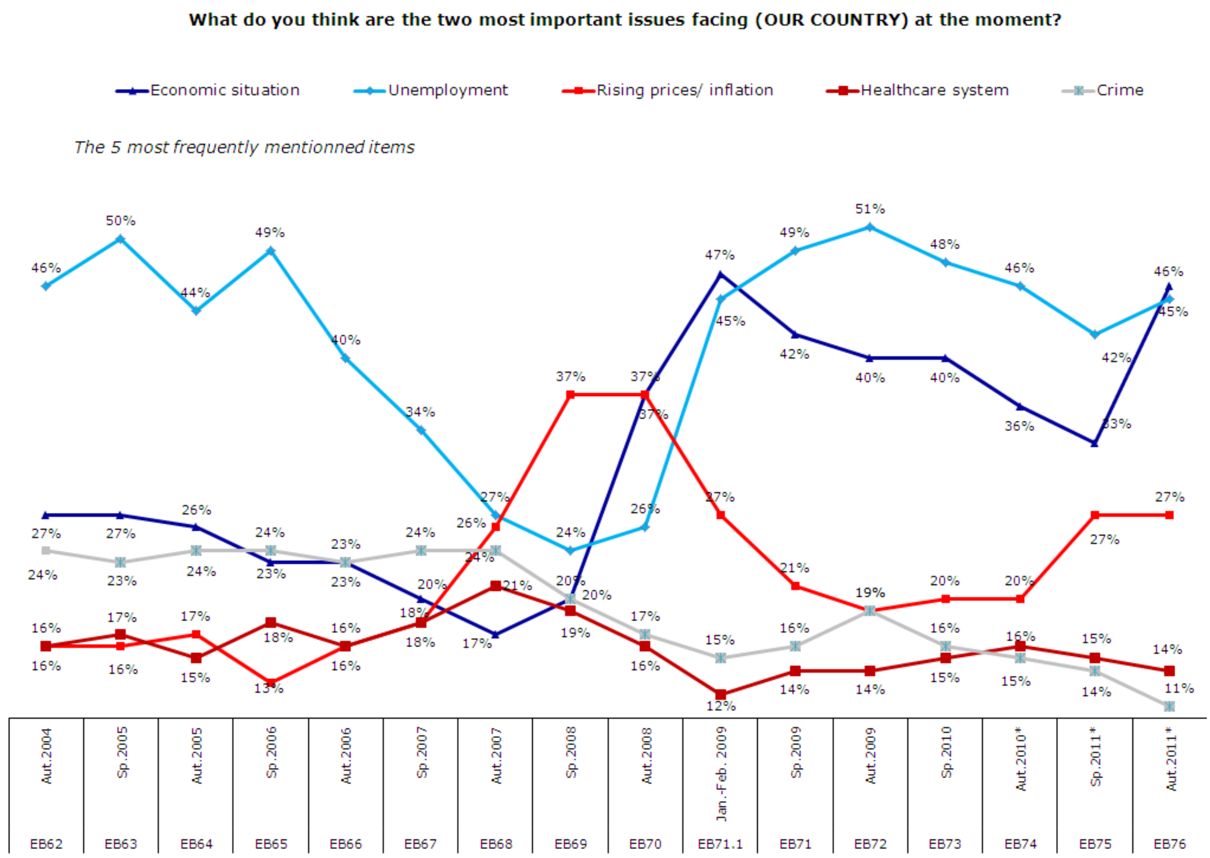
- Concerns about the economic situation have surged and this has become once again the number one national concern -

The order of importance in which Europeans rank the problems facing their country has changed, reflecting an increase in concerns about the economic situation, which has become once again the most important issue with a score of 46%, i.e. an increase of 13 percentage points since EB75 of spring 2011. The last time the economic situation topped the list of concerns was at the time of EB71.1, carried out in January and February 2009 (47% at that time). Since then, scores for this item have trended downwards.

Unemployment has fallen to second place, despite also having recorded a higher score (45%, +3). Rising prices remain in third place, with an unchanged score of 27%, after a significant increase in the last Eurobarometer wave[18].

In this context of a strong focus on economic issues, the scores for the other items have in general fallen or are stable: healthcare systems (14%, -1), crime (11%, -3), pensions (10%, +1), immigration (7%, -5), taxation (7%, =) and the educational system (7%, -1). The other items, namely energy (4%, -2), housing (4%, =), terrorism (4%, -2), the environment (3%, -1) and defence/foreign affairs (1%, -1)[19] are clearly seen as minor issues.

[18] Concerns about rising prices had increased by 7 percentage points in EB75
[19] QA6 What do you think are the two most important issues facing (OUR COUNTRY) at the moment?



*In EB74, EB75 and EB76 only half the sample (SPLIT A) was asked this question

The order of importance in which respondents rank the issues facing their country differs slightly between eurozone countries and non-eurozone countries. The former place the economic situation at the top of their list (48%). Respondents in the non-eurozone countries are also very preoccupied with this issue (41%), but unemployment remains their main concern (47% versus 44% in the eurozone). They are also more concerned about rising prices (30% versus 26% in the eurozone).

The economic situation tops the list of national concerns in 13 Member States (versus six in spring 2011), notably in Greece (75%), Slovenia (67%), Denmark (65%), Spain (65%) and the Netherlands (65%). Concerns about the economic situation have increased the most spectacularly in Malta (+31 points to 51%), the Netherlands (+24, 65%), Italy (+24, 61%), Sweden (+22, 34%) and Belgium (+20, 45%).

Unemployment is the main national concern in 12 of the 27 Member States (ranked equal first with the economic situation in Finland). It was mentioned very frequently by respondents in Spain (81%), Ireland (64%), Portugal (62%) and Greece (61%). The unemployment scores have increased significantly since spring 2011 in Denmark (49%, +15), the United Kingdom (48%, +14) and Bulgaria (57%, +10).

Inflation and rising prices are seen as the main concern in three Member States: Estonia (48%), Austria (41%) and Germany (34%). But the highest score for this item was recorded in Poland (50%). Bulgaria recorded the biggest change for this item (-13 percentage points, to 27%).

Pensions are slightly more of an issue in the Netherlands, where they are ranked in third place among national concerns (21%, +3).

Immigration is still seen as a major issue in Luxembourg (21%, -1), where this item had gained significant ground in spring 2011, and in the United Kingdom (21%, +1). On the other hand, concerns about this issue have fallen significantly in Malta (-25 percentage points, to 14%) and Italy (-18, to 6%), after a strong increase in spring 2011.

Concerns about the **educational system** have increased in Luxembourg (25%, +7). Respondents in Germany are also still fairly concerned about this issue (21%, +1). On the other hand, the number of respondents mentioning this item in Sweden has fallen, even if it remains a major concern (19%, -10).

Energy was less frequently mentioned than in spring 2011 in Germany (14%, -8) and Malta (15%, -5), even if these scores are still higher than in the rest of the European Union.

For the candidate countries:

- The economic situation is the main concern in Iceland (57%, despite a fall of 6 percentage points) and Montenegro (53%, -3).
- Respondents in Croatia (70%, -3) and the Former Yugoslav Republic of Macedonia (67%, +6) are concerned above all about unemployment.
- Iceland stands out because of the significant increase in concerns about healthcare, which is now ranked second among national concerns (40%, +18).
- In Turkey, terrorism is still the main concern and has gained ground (63%, +8).

As with personal concerns, a list of national concerns, identical to the list used regularly, was put to half of the sample and a modified* list was put to the other half:

- **Public debt is even more a national concern than in spring 2011 for Europeans** (17%, +3) and it has moved up from fifth to fourth place in the list of concerns. Already ranked as the main concern in Germany six months earlier, this item has gained ground in that country (40%, +6). It has also gained significant ground in Belgium (31%, +13), France (20%, +12) and Malta (20%, +9). The following countries stand out by scores of less than 5% for this item: Sweden (1%), Estonia (1%), Bulgaria (3%) and Denmark (4%). The non-eurozone countries are on average far less preoccupied with public debt (10%) than the eurozone countries (22%)
- The **cost of energy** is seen as a minor issue (3%, -2), and gives less cause for concern than in spring 2011 in Germany (9%, -8), and Malta (11%, -5), although the scores in these two countries are still above the average.
- **Climate change** also remains a minor issue (2%, unchanged).

* In comparison with the "traditional" question, the new items are "public debt" and "climate change". "Defence and foreign policy" has been replaced by "the external influence of (YOUR COUNTRY)" and "energy" has been replaced by the "cost of energy", while "housing" has been omitted.

2.4 The main concerns at European level

- In the opinion of Europeans the economic situation and the public finances of the Member States are the two most important issues facing the European Union -

There have also been significant changes in the order of importance in which Europeans rank the problems facing the European Union.

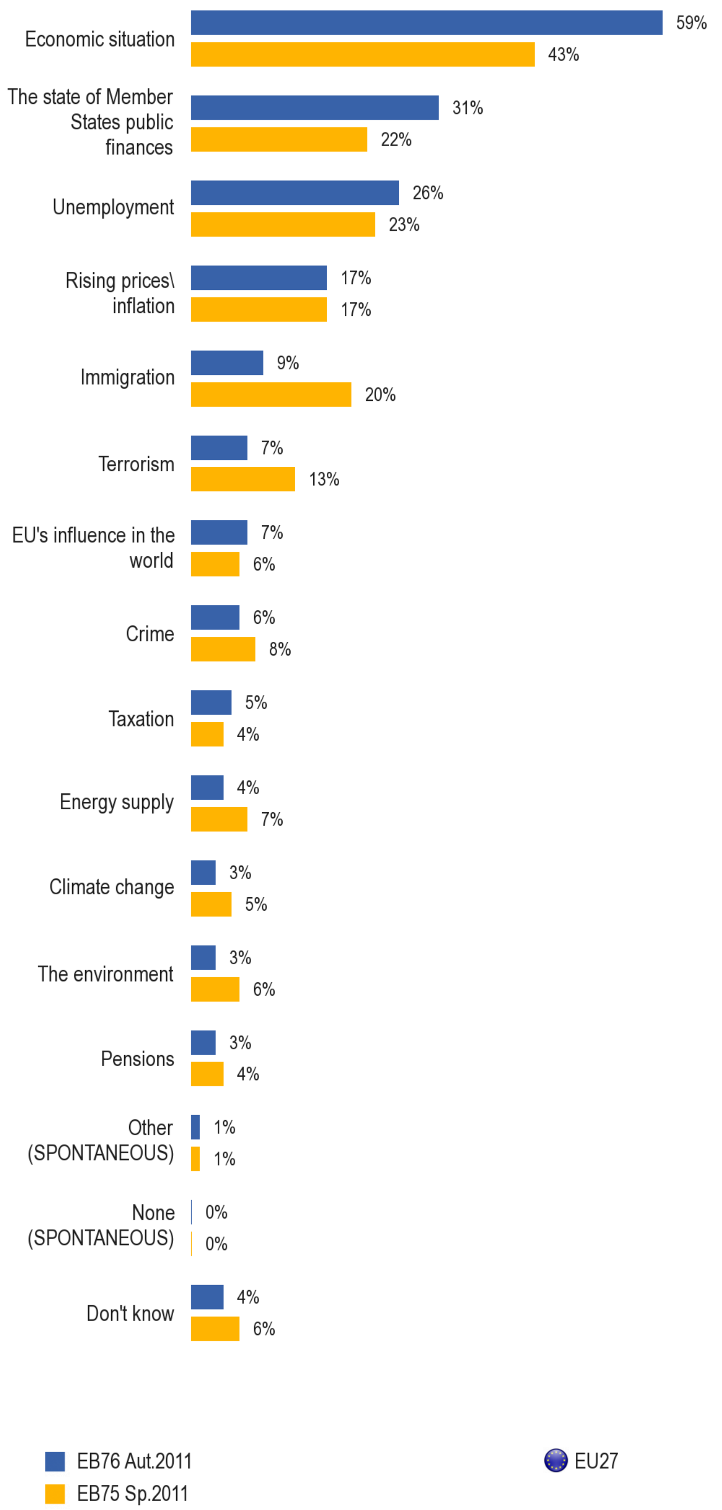
As in spring 2011, the economic situation tops the list in autumn 2011. Moreover, its score has increased significantly (59%, +16 percentage points). As a result of a strong increase in the number of respondents mentioning the public finances of the Member States, this item is now ranked in second place (31%, +9), followed by unemployment, which has gained ground, in third place (26%, +3), ahead of inflation and rising prices (17%, unchanged). Although economic issues have tended to dominate the concerns of Europeans in previous Eurobarometer surveys, this situation is now even more pronounced as the other issues have in general lost ground.

Although immigration, which was widely mentioned in spring 2011, has lost ground (9%, -11), it is still ranked in fifth place among the concerns of Europeans. Terrorism has also lost ground (7%, -6) and is now ranked equally with Europe's influence in the world (7%, +1).

Crime (6%, -2), taxation (5%, +1), energy supplies (4%, -3), climate change (3%, -2), the environment (3%, -3) and pensions (3%, -1)[20] obtained the lowest scores.

[20] QA8 What do you think are the two most important issues facing the EU at the moment?

QA8. What do you think are the two most important issues facing the EU at the moment?



Despite some differences in intensity, the main problems identified for the European Union are the same both inside and outside the eurozone.

The economic situation was mentioned very frequently by both eurozone and non-eurozone respondents (60% in the eurozone and 58% outside the eurozone). The state of the public finances of the Member States was mentioned more frequently in the eurozone countries (34%, after an increase of 10 percentage points), but this issue also ranks second among the concerns of non-eurozone respondents (26%, +6), ahead of unemployment and rising prices.

The eurozone countries stood out in spring 2011 by their strong concerns about immigration (21% in EB75), but the score for immigration has fallen sharply in autumn 2011 (8%, -13).

At national level:

- **The economic situation** tops the list in all the Member States except for Germany, which continues to see the public finances of the Member States as the most important issue facing the European Union, and even more so than in spring 2011 (57%, +10).

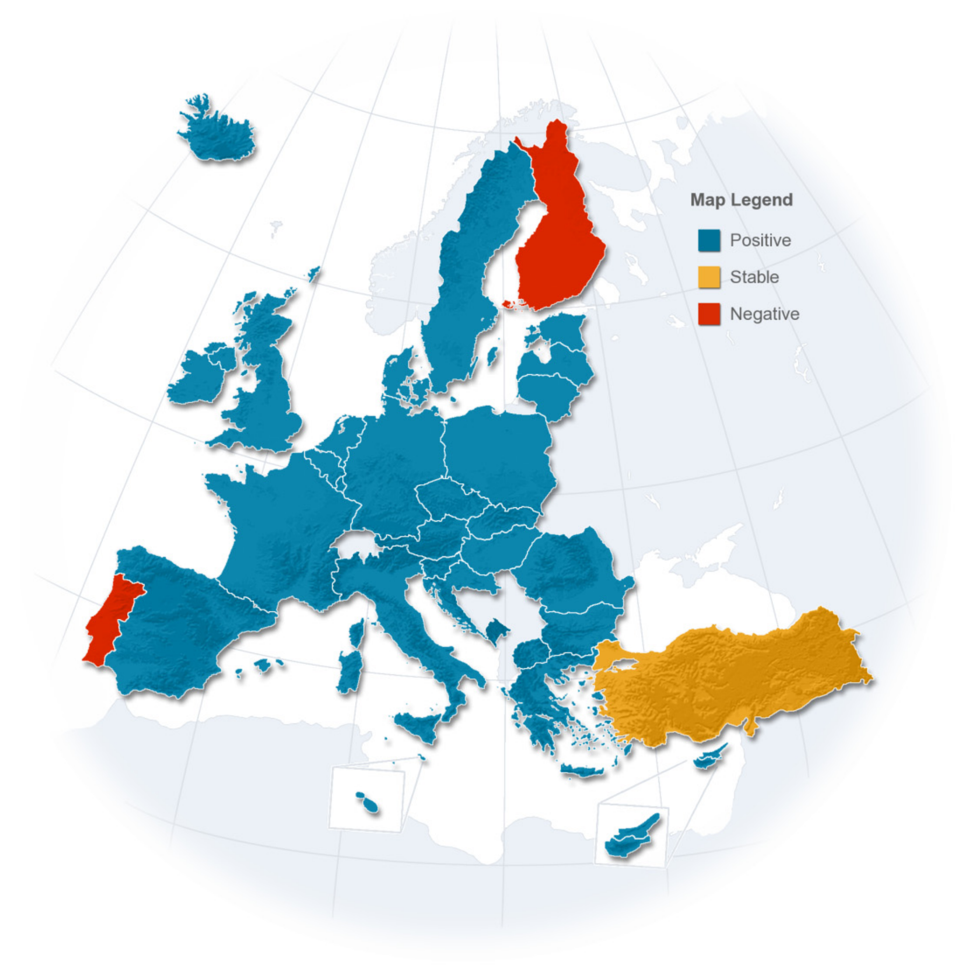
- Respondents in Denmark (83%, +28), the Netherlands (79%, +21) and Sweden (78%, +28), which have now overtaken Greece (73%, +5) and Spain (72%, +18), are the most likely to mention the **economic situation** as the most important issue facing the EU. But this item has also gained significant ground in Malta (up by 22 percentage points, to 59%), Estonia (+20, to 64%), Italy (+20, to 59%), France (+20, to 58%) and Luxembourg (+20, to 53%).

- After Germany, the countries where concerns about the **state of the public finances of the Member States** are the strongest are the Netherlands (48%, +5), Slovenia (47%, +12) and Austria (46%, +8). The countries which recorded the biggest increase in concerns about public finances are Malta (up by 22 percentage points, to 34%), Cyprus (+16, to 25%), Greece (+15, to 30%) and Estonia (+15, to 43%).

MT	34%	+21
CY	25%	+16
EE	43%	+15
EL	30%	+15
BE	34%	+13
FR	31%	+13
SI	47%	+12
ES	20%	+12
SK	45%	+11
LT	24%	+11
BG	19%	+11
DE	57%	+10
CZ	40%	+10
HU	38%	+10
EU27	31%	+9
UK	25%	+9
AT	46%	+8
IT	15%	+8
PL	22%	+7
IE	34%	+6
LV	28%	+6
RO	19%	+6
NL	48%	+5
SE	33%	+5
LU	31%	+5
DK	28%	+3
FI	42%	-4
PT	16%	-4
CY (tcc)	14%	(+3)
MK	30%	+17
IS	51%	+11
ME	17%	+10
HR	26%	+4
TR	7%	=

Question: QA8. What do you think are the two most important issues facing the EU at the moment?

Answers: The state of Member States public finances



Evolution Autumn 2011 / Spring 2011

- The highest scores for **unemployment** were recorded in Spain (52%), Cyprus (47%) and Portugal (41%). Alongside Spain (+7 percentage points), Denmark (+11, to 34%), Bulgaria (+7, to 26%) and the United Kingdom (+7, to 24%) are the countries where concerns about unemployment have gained the most ground.

- **Immigration** was far less frequently mentioned this time in certain countries which had placed it at the heart of their concerns in spring 2011, notably Malta (-31 points, to 13%), Italy (-21, to 6%), Denmark (-19, to 7%) and France (-15, to 12%).

The **economic situation** is also seen as the most pressing problem facing the European Unions by respondents in the candidate countries, who also give priority to economic issues. We note that Montenegro continues to rank crime in second place among the key European issues, despite a fall (26%, -5).

QA8 What do you think are the two most important issues facing the EU at the moment?

	Economic situation	The state of Member States public finances	Unemployment	Rising prices\ inflation	Immigration	Terrorism	EU's influence in the world	Crime	Taxation	Energy supply	Pensions	The environment	Climate change
EU27	59%	31%	26%	17%	9%	7%	7%	6%	5%	4%	3%	3%	3%
BE	53%	34%	18%	16%	15%	6%	7%	8%	5%	7%	7%	4%	6%
BG	68%	19%	26%	11%	10%	13%	8%	9%	1%	5%	2%	6%	3%
CZ	58%	40%	18%	13%	10%	11%	6%	9%	2%	3%	3%	4%	3%
DK	83%	28%	34%	5%	7%	7%	4%	5%	-	4%	1%	7%	11%
DE	50%	57%	13%	17%	8%	8%	6%	6%	4%	6%	2%	3%	6%
EE	64%	43%	18%	13%	7%	6%	8%	3%	5%	4%	3%	3%	1%
IE	65%	34%	35%	13%	4%	2%	9%	7%	4%	5%	3%	2%	3%
EL	73%	30%	39%	10%	5%	3%	12%	7%	5%	1%	1%	2%	1%
ES	72%	20%	52%	9%	6%	3%	6%	3%	4%	1%	3%	2%	2%
FR	58%	31%	25%	21%	12%	6%	7%	8%	2%	5%	4%	6%	2%
IT	59%	15%	36%	26%	6%	6%	5%	4%	12%	4%	5%	2%	2%
CY	68%	25%	47%	8%	13%	5%	4%	14%	2%	2%	1%	2%	3%
LV	51%	28%	22%	10%	17%	9%	5%	6%	8%	3%	3%	2%	4%
LT	56%	24%	19%	18%	13%	7%	4%	9%	9%	6%	2%	1%	3%
LU	53%	31%	26%	12%	17%	7%	7%	12%	1%	5%	5%	5%	5%
HU	56%	38%	27%	15%	5%	6%	6%	6%	4%	11%	3%	4%	3%
MT	59%	34%	14%	12%	13%	5%	4%	5%	5%	8%	2%	4%	3%
NL	79%	48%	16%	9%	6%	4%	13%	5%	3%	2%	3%	2%	3%
AT	47%	46%	16%	24%	11%	4%	8%	8%	6%	6%	4%	6%	5%
PL	51%	22%	24%	26%	5%	9%	4%	6%	4%	4%	3%	3%	1%
PT	56%	16%	41%	13%	1%	3%	6%	8%	8%	1%	4%	1%	-
RO	54%	19%	18%	16%	9%	10%	7%	12%	5%	4%	6%	4%	3%
SI	63%	47%	25%	7%	4%	4%	5%	13%	4%	3%	3%	2%	2%
SK	64%	45%	18%	19%	3%	8%	13%	7%	3%	2%	2%	4%	3%
FI	58%	42%	19%	11%	9%	8%	10%	10%	4%	5%	3%	6%	7%
SE	78%	33%	24%	4%	4%	5%	6%	4%	1%	6%	1%	12%	17%
UK	57%	25%	24%	14%	16%	7%	7%	6%	3%	4%	3%	2%	3%
CY (tcc)	42%	14%	22%	23%	12%	22%	18%	17%	11%	2%	2%	1%	-
HR	66%	26%	31%	14%	5%	10%	7%	18%	2%	2%	1%	1%	4%
TR	30%	7%	18%	15%	6%	13%	8%	6%	4%	4%	2%	2%	1%
MK	46%	30%	13%	12%	11%	11%	8%	21%	2%	2%	-	1%	5%
IS	60%	51%	31%	6%	8%	3%	9%	5%	1%	4%	1%	8%	5%
ME	58%	17%	24%	14%	5%	8%	8%	26%	8%	3%	2%	3%	2%

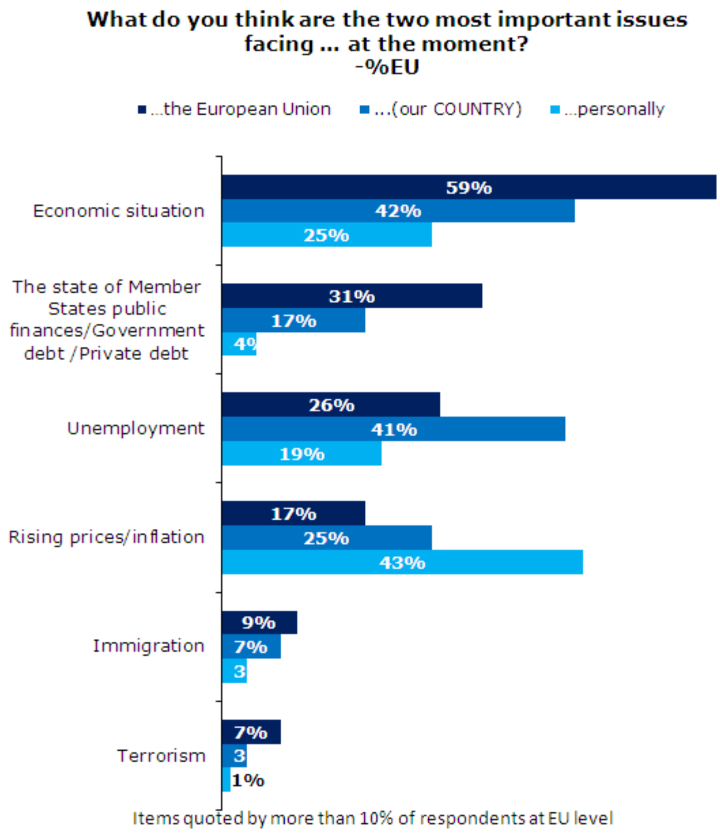
Highest percentage per country *Lowest percentage per country*

Highest percentage per item Lowest percentage per item

A socio-demographic analysis reveals fairly few differences. We note that managers are more likely to be attentive to the state of the public finances of the Member States (43% versus 31% on average), whereas unemployed people are more likely to mention unemployment (36% versus 26% on average).

Although it is not possible strictly speaking to compare concerns at personal, national and European levels, as the lists are not absolutely identical, we note:

- Concerns about economic issues are increasingly predominant and now "crush" almost all the other issues.
- That is particularly the case for concerns about the economic situation, which are now at levels close to those of EB71 of spring 2009, when 42% of the people polled mentioned the economic situation as a problem at national level, and 26% at personal level.
- Concerns about public debt continue to gain ground at European level (31%, +9 percentage points since spring 2011) and, to a lesser extent, at national level (17%, +3 percentage points).



In this context of an overwhelming focus on the economy, debt, unemployment and rising prices, the differences between Member States are slightly less pronounced than usual.

3. POLITICAL ASPECTS

3.1 Interest in politics

Since the spring 2010 Eurobarometer (EB73), the index of interest in politics, constructed using the answers to questions on interest in local, national and European politics has recorded very few changes[21]: the majority continue to be "moderately" interested in politics (44%, +1 percentage point since EB75 of spring 2011). Those who follow politics very closely ("strong" interest) represent 15% of the people polled (+1 since spring 2011). Just over a quarter of Europeans are "slightly" interested in politics (23%, -1) and 18% (-1) are "not at all interested". All in all, almost six out of ten Europeans are interested, either strongly or moderately, in politics.

It is noteworthy, moreover, that more than one in two Europeans "never" (24%) or only "rarely" (29%) try to convince those around them (friends, colleagues and relations) to adopt an opinion which they believe in strongly. On the other hand, 36% of Europeans do so "from time to time" and 10% "often" (proportions unchanged since EB75).

More specifically, interest in politics is particularly strong in Greece (36% have a "strong" interest), where it has increased by 5 percentage points, the Netherlands (26%, unchanged), and Denmark (25%) where it has also increased by 5 percentage points. Interest in politics has also increased in Luxembourg (21%, +7), Cyprus (21%, +5) and, to a lesser extent, France (16%, +4).

This question, combined with the index of interest in politics, enables us to construct an opinion leadership index[22]. In proportions which are generally unchanged since spring 2011, the first group (++) represents 15% of Europeans (+1), the second (+) 34% (-1), the third (-) 28% (=) and the last (--) 23% (=).

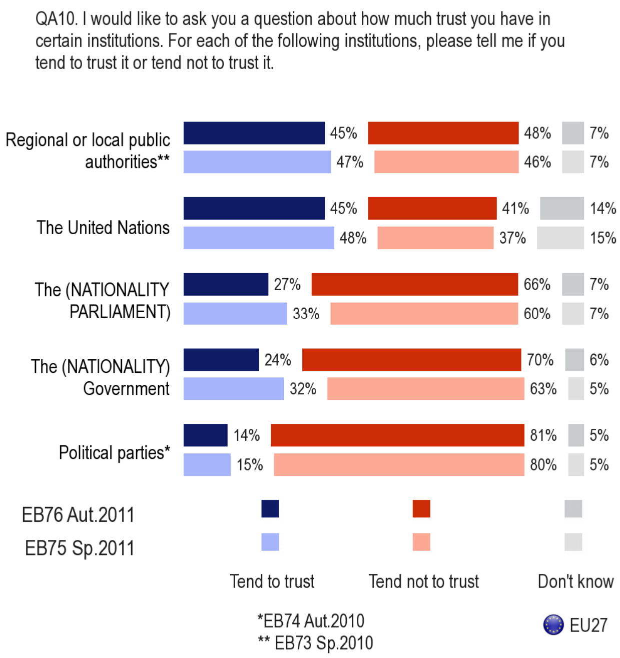
A socio-demographic analysis reveals that those with a "strong interest" in politics are more likely to be men, in older age groups, better educated and to have less difficulty paying their bills; they are also more likely to be retired, self-employed and managers.

On the other hand, a greater proportion of those who are not at all interested in politics are women, young people, manual workers, house persons and the unemployed, as well as those who struggle to pay their bills most of the time.

[21] A score was attributed to each answer: "Never" = 0; "Occasionally" = 1; "Often"= 2. An index was then constructed by adding together the scores for the three dimensions (local, national and European). Each group corresponds to a different index level: "not at all interested in politics" = 0; "slightly" = 1 to 2; "moderately" = 3 to 4; "strongly" = 5 to 6.

[22] This index is divided into 4 groups (1. ++; 2. +; 3. -; 4. - -). If someone tries often or from time to time to convince someone or regularly discusses politics then they are considered as an opinion leader in the category 1 (++). Conversely, if someone never or rarely tries to convince someone or never discusses politics then they are considered not to be an opinion leader and fall into category 4 (--).

3.2 Trust in institutions



After an improvement in spring 2011, trust in national institutions has fallen significantly: 24% of Europeans trust their **government** (-8 percentage points since spring 2011, versus 70% who distrust it, +7) and 27% trust their **parliament** (-6, versus 66%, +6)[23].

A majority of respondents continue to trust their government and parliament in only three Member States, despite a fall in positive opinions: Luxembourg (68%, -9, trust their government and 56%, -6, trust their parliament), Finland (56%, -6 and 58%, -8) and Sweden (61%, -4 et 71%, -2).

While a majority of respondents still trust their parliament, those who also trust their government are now in a minority in Denmark (64%, -2 for the parliament, and 42%, -11 for the government after the strong improvement noted in spring 2011) and in the Netherlands (50%, -13, and 45%, -12).

The most striking changes include a loss of trust in several countries in which opinions had improved significantly between autumn 2010 and spring 2011: Ireland (22%, -20 for the government, and 21%, -18 for the parliament) and Austria (46%, -16, and 46%, -18). Although relatively stable in spring 2011, trust has also fallen sharply in Cyprus, both as regards the government (29%, -18 percentage points) and the parliament (27%, -17 percentage points).

Turkey is the only candidate country where a majority of respondents trust the government (49%, despite a fall of 9); however, only a minority of respondents now trust the parliament (44%, -11).

Trust in **political parties**, which was already negligible at the time of EB74 of autumn 2010, is still very marginal (14%, -1 in one year, versus 81% of distrust, +1). It is very much the minority opinion in all the Member States and candidate countries.

Trust in **regional or local political authorities** seems more resilient, even if it has now become the minority position (45%, -2 since EB73 of spring 2010, versus 48%, +2).

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

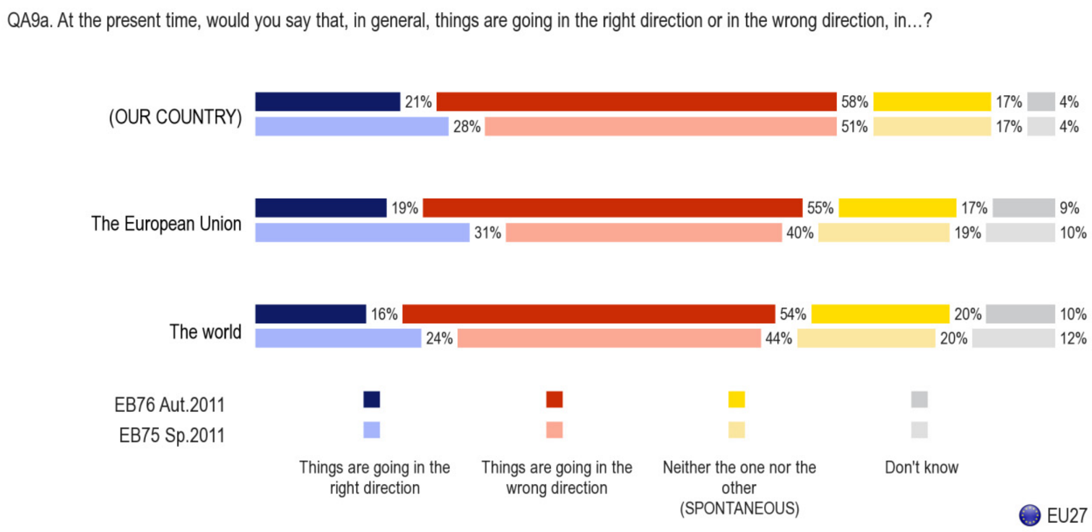
It is still the majority opinion in 13 Member States, notably in Denmark (72%, +1), Luxembourg (71%, +4) and Sweden (64%, =). It has fallen significantly in Greece (19%, -11), Italy (20%, -9), Estonia (55%, -9) and Malta (33%, -8). On the other hand, it has gained ground in Belgium (62%, +7).

Trust in the **United Nations** has fallen by several percentage points since EB75 of spring 2011, but the institution is still trusted by a relative majority (45%, -3, versus 41%, +4). A majority of respondents in 19 Member States trust it. The exceptions, with in some cases a sharp deterioration in trust, are Greece (only 19% trust it, -3), Cyprus (29%, =), Slovenia (34%, -3), Italy (34%, -10), Spain (38%, -1), Ireland (38%, -11), Portugal (39%, -10) and, to a lesser extent, Germany (41%, -3).

3.3 The direction in which things are going

- The impression that things are going in the wrong direction has increased significantly -

A growing majority of Europeans think that things are going in the wrong direction, whether in their country (58%, +7), the European Union (55%, +15) or the world (54%, +10)[24]. At national and EU levels[25], the scores are the worst ever recorded since these indicators were first used in the Eurobarometer survey in spring 2006[26]. Before this survey, a low had been reached in EB71.1 carried out in January-February 2009: at that time, 23% of Europeans thought that things were going in the right direction in their country versus 55% who took the opposite view; with regard to the EU, 29% thought that things were going in the right direction, whilst 39% disagreed.



The respondents who are the most likely to think that things are going in the wrong direction in their country are those in Greece where, however, this feeling is slightly less strong than before (80%, -2), Spain, where this impression has increased considerably (80%, +13), the Czech Republic (76%, +9), Romania (71%, +1), France (70%, +4) and Hungary (70%, +13).
In addition to Spain and Hungary, opinions have become significantly more critical in Cyprus (65%, +18), Finland (52%, +17) and Slovakia (65%, +15).

A majority of respondents in four Member States are still positive about the way things are going in their country, despite a fall in support for the direction taken: Sweden (52% think that things are going in the right direction, -4), Luxembourg (46%, -5), Estonia (43%, -8) and Austria (37%, -10).

[24] QA9 At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in…?
[25] The item referring to the world situation was only created in EB75 of spring 2011
[26] Special Eurobarometer 251: The Future of Europe
http://ec.europa.eu/public_opinion/archives/ebs/ebs_251_en.pdf

Positive opinions about the direction taken by the European Union now outweigh negative opinions in only three Member States (versus nine in spring 2011): Bulgaria (47% think that things are going in the right direction, -7), Latvia (35%, -5) and Romania (32%, despite a sharp fall of -20).

The most critical countries, with very often a sharp deterioration in sentiment, are now the United Kingdom (69% think that things are going in the wrong direction in the European Union, +20), Finland (68%, +15), Spain (67%, +28), France (67%, +15), the Netherlands (65%, +19), Denmark (64%, +19), Sweden (64%, +21), Luxembourg (63%, +15), Greece (62%, +7), Belgium (59%, +21) and Slovakia (59%, +21). Other countries, without being among the most critical, have become increasingly negative: Lithuania (43%, +27), Estonia (40%, +23), Poland (44%, +22), Cyprus (54%, +21) and Ireland (51%, +21).

In general, although there are no significant differences between the EU15 and NMS12 respondents regarding the direction taken by their country, opinions diverge on the direction taken by the European Union: the EU15 countries are more critical (58% think that things are going in the wrong direction in the EU, +13 percentage points since spring 2011, versus 16% who think that they are going in the right direction, -10) than the NMS12 countries (41% "in the wrong direction", +18, versus 30% "in the right direction", -16). The difference between eurozone countries (56%, +13, versus 16%, -11) and non-eurozone countries (52%, +18, versus 24%, -14) is less pronounced.

Positive opinions about the world situation now outweigh negative opinions in only three Member States: Bulgaria (37%, =), Estonia (36%, -4) and Latvia (32%, -3). There is therefore a fairly close correlation between the opinions about the world situation and those about the European situation[27].

Negative opinions are, as for the situation of the European Union, particularly widespread in Luxembourg (71%, +9), France (68%, +7), Spain (67%, +16), Belgium (65%, +10), Cyprus (62%, +16), the United Kingdom (61%, +9) Finland (60%, +17), Denmark (57%, +15), Greece (57%, -2) and Slovakia (57%, +8). The feeling that things are going in the wrong direction has gained particularly significant ground in Lithuania (38%, +20), Ireland (42%, +18) and Poland (48%, +18).

[27] Correlation of 0.85 percentage points.

QA9 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	Diff Aut.2011 - Sp.2011	Things are going in the wrong direction	Diff Aut.2011 - Sp.2011
EU27	21%	-7	58%	+7
BE	18%	-8	61%	+5
BG	32%	+5	35%	-4
CZ	12%	-7	76%	+9
DK	36%	-8	50%	+4
DE	33%	-8	35%	+6
EE	43%	-8	39%	+13
IE	26%	-1	48%	+7
EL	7%	-2	80%	-2
ES	9%	-7	80%	+13
FR	15%	-2	70%	+4
IT	8%	-9	65%	+11
CY	11%	-9	65%	+18
LV	26%	+10	49%	-12
LT	21%	-7	53%	+4
LU	46%	-5	30%	+3
HU	10%	-9	70%	+13
MT	25%	-8	36%	+2
NL	20%	-15	46%	+12
AT	37%	-10	32%	+4
PL	33%	-1	51%	+3
PT	19%	=	53%	+1
RO	12%	-4	71%	+1
SI	9%	+1	69%	-5
SK	18%	-16	65%	+15
FI	30%	-19	52%	+17
SE	52%	-4	40%	+6
UK	24%	-11	62%	+10
CY (tcc)	12%	-2	64%	+5
HR	12%	-1	77%	-3
TR	30%	-14	58%	+11
MK	36%	+13	44%	-11
IS	47%	-4	41%	+1
ME	38%	-5	36%	+10

	The European Union			
	Things are going in the right direction	Diff Aut.2011 - Sp.2011	Things are going in the wrong direction	Diff Aut.2011 - Sp.2011
EU27	19%	-12	55%	+15
BE	22%	-16	59%	+21
BG	47%	-7	15%	+6
CZ	23%	-15	56%	+18
DK	21%	-15	64%	+19
DE	21%	-5	46%	+4
EE	36%	-15	40%	+23
IE	15%	-17	51%	+21
EL	16%	-7	62%	+7
ES	13%	-19	67%	+28
FR	14%	-8	67%	+15
IT	13%	-10	48%	+6
CY	15%	-8	54%	+21
LV	35%	-5	29%	+7
LT	26%	-28	43%	+27
LU	18%	-11	63%	+15
HU	18%	-18	45%	+18
MT	15%	-13	42%	+14
NL	12%	-9	65%	+19
AT	21%	-11	55%	+13
PL	33%	-14	44%	+22
PT	19%	-10	44%	+15
RO	32%	-20	31%	+12
SI	21%	-10	46%	+9
SK	24%	-21	59%	+21
FI	22%	-10	68%	+15
SE	24%	-13	64%	+21
UK	13%	-11	69%	+20
CY (tcc)	17%	-17	47%	+24
HR	24%	-19	56%	+18
TR	17%	-11	56%	+9
MK	36%	-19	34%	+18
IS	30%	-8	47%	+12
ME	41%	-10	31%	+15

	The world			
	Things are going in the right direction	Diff Aut.2011 - Sp.2011	Things are going in the wrong direction	Diff Aut.2011 - Sp.2011
EU27	16%	-8	54%	+10
BE	15%	-9	65%	+10
BG	37%	=	14%	+1
CZ	23%	-11	56%	+13
DK	24%	-18	57%	+15
DE	13%	-6	46%	+7
EE	36%	-4	33%	+12
IE	13%	-15	42%	+18
EL	13%	-4	57%	-2
ES	13%	-7	67%	+16
FR	10%	-5	68%	+7
IT	10%	-8	54%	+7
CY	7%	-2	62%	+16
LV	32%	-3	28%	+4
LT	27%	-20	38%	+20
LU	10%	-8	71%	+9
HU	13%	-13	52%	+13
MT	10%	-6	46%	+9
NL	15%	-9	50%	+9
AT	19%	-6	49%	+10
PL	26%	-10	48%	+18
PT	16%	-7	39%	+13
RO	21%	-19	35%	+14
SI	14%	-9	49%	+8
SK	23%	-10	57%	+8
FI	22%	-12	60%	+17
SE	31%	-3	56%	+9
UK	18%	-6	61%	+9
CY (tcc)	12%	-14	53%	+30
HR	19%	-13	57%	+11
TR	12%	-10	59%	+7
MK	31%	-8	35%	+12
IS	30%	-7	51%	+11
ME	34%	-9	32%	+13

The answers regarding the **direction taken by the European Union** vary little between the socio-demographic categories, given that the impression that things are going in the wrong direction is now the majority opinion in most categories. We note however that:

- This opinion is slightly less prevalent among young people (48% among those aged between 15 and 24) and students (46%), compared with 55% on average.
- Managers (57%), employees (56%) and manual workers (57%) perceive the situation in the same way, but the impression that things are going in the wrong direction in the European Union is slightly more pronounced among unemployed people (61%) and those who have difficulties paying their bills (63% versus 53% of those who almost never have such difficulties).
- The respondent's interest in politics has little influence in shaping opinions (58% of those having a strong interest in politics, versus 56% of those having only a slight interest in politics).
- Logically, the impression that things are going in the wrong direction is less pronounced among those for whom the EU conjures up a positive image (36%), in line with the average among those for whom the EU's image is neutral (54%) and more widespread among those for whom its image is negative (80%).
- On the other hand, there are almost no differences according to the respondent's objective knowledge of the European Union: 53% of those who have a good objective knowledge of the EU consider that things are going in the wrong direction, versus 54% of those whose knowledge of the EU is poor.

QA9.2 At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in...?

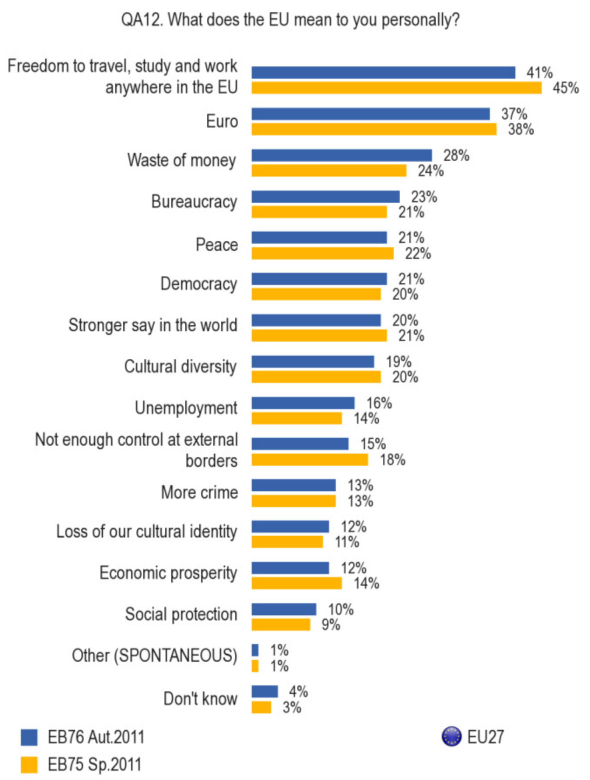
The European Union

	Things are going in the right direction	Things are going in the wrong direction	Neither the one nor the other (SPONTANEOUS)	Don't know
EU27	19%	55%	17%	9%
Gender				
Male	21%	55%	17%	7%
Female	17%	54%	18%	11%
Age				
15-24	26%	48%	16%	10%
25-39	20%	55%	17%	8%
40-54	16%	59%	17%	8%
55 +	17%	54%	19%	10%
Respondent occupation scale				
Self- employed	19%	56%	18%	7%
Managers	20%	57%	17%	6%
Other white collars	19%	56%	18%	7%
Manual workers	18%	57%	17%	8%
House persons	16%	52%	18%	14%
Unemployed	15%	61%	14%	10%
Retired	18%	53%	19%	10%
Students	28%	46%	16%	10%
Difficulties paying bills				
Most of the time	13%	63%	14%	10%
From time to time	18%	55%	18%	9%
Almost never	21%	53%	18%	8%
Political interest index				
Strong	22%	58%	16%	4%
Average	21%	53%	19%	7%
Low	17%	56%	16%	11%
Not at all	14%	54%	16%	16%
Image of the UE				
Positive	37%	36%	20%	7%
Neutral	15%	54%	20%	11%
Négative	5%	80%	9%	6%
Objective knowledge of the EU				
Bad	8%	54%	13%	25%
Average	17%	56%	18%	9%
Good	24%	53%	18%	5%

II THE EUROPEAN UNION AND ITS CITIZENS

1. WHAT DOES THE EUROPEAN MEAN TO CITIZENS?

– Freedom of movement and the euro still top the list of the things associated with the European Union. Negative perceptions have gained ground –



The previous Standard Eurobarometer reports had highlighted the stability and deep-rooted nature of the fundamental representations of the European Union in the eyes of Europeans. That is still the case in this latest survey, as freedom of movement and the euro are still seen as by far the most representative symbols of the European Union. Nevertheless, this indicator has been affected by a decrease in positive representations, together with an increase in negative representations[28].

With a score of 41% (-4 percentage points since the spring 2011 survey), "the freedom to travel, study and work anywhere in the EU" still tops the list of things associated with the European Union, ahead of the "euro" (37%, -1 percentage point). These two dimensions are followed by two negative perceptions, both of which have gained ground: "waste of money" (28%, +4) and "bureaucracy" (23%, +2). The next highest scores were obtained by "peace" (21%, -1), "democracy" (21%, +1) and "a stronger say in the world" (20%, -1). All the other items recorded scores of less than 20%.

There is an upward trend in negative representations: in autumn 2009 (EB72), "waste of money" and "bureaucracy" were ranked 7th (21%) and 8th (20%) respectively in the list of symbols of the European Union, whereas they are now ranked 3rd (28%) and 4th (23%) respectively.

[28] QA12. What does the EU mean to you personally? Peace; Economic prosperity; Democracy; Social protection; Freedom to travel, study and work anywhere in the EU; Cultural diversity; Stronger say in the world; Euro; Unemployment; Bureaucracy; Waste of money; Loss of our cultural identity; More crime; Not enough controls at external borders; Other (SPONTANEOUS); Don't Know.

As in previous Eurobarometer surveys, **freedom of movement within the EU** continues to strike a chord in particular with the Nordic countries (69% in Sweden, 60% in Finland and 59% in Denmark) and the Baltic States (64% in Estonia, 61% in Latvia and 59% in Lithuania).

Respondents in Austria (68%), Slovakia (62%), Greece (59%), Germany (58%), as well as Slovenia and Belgium (56% each) are the most likely to see **the euro** as the embodiment of the EU.

Respondents in Austria (53%), Germany (49%) and France (38%) are more likely than Europeans on average to perceive the EU as a **waste of money**. Moreover, this perception has increased significantly in these three countries (+7 percentage points in France, +6 in Germany and +5 in Austria) and is ranked for the first time in second place in Austria and France.

This indicator differs substantially from one group of countries to another. With a score of 39%, for the first time since this indicator was introduced, freedom of movement no longer tops the list of answers in the EU15 countries. It has been overtaken by the euro (41%), with a waste of money in third place (32%). On the other hand, it is still by far the most frequently mentioned item in the NMS12 countries (47%), ahead of the euro and democracy (both 24%). A waste of money is mentioned far less frequently in the latter group of countries (16%). Finally, the euro (47%, in first place) and a waste of money (31%, in third place) are mentioned far more frequently in the eurozone countries than in the non-eurozone countries (20%, in fourth place, and 23%, in second place, respectively). Non-eurozone respondents place the freedom to travel, study and work anywhere in the EU in first place (41%).

QA12 What does the EU mean to you personally?

		EU27
1	Freedom to travel, study and work anywhere in the EU	41%
2	Euro	37%
3	Waste of money	28%

		EU15
1	Euro	47%
2	Freedom to travel, study and work anywhere in the EU	39%
3	Waste of money	32%

		NMS12
1	Freedom to travel, study and work anywhere in the EU	47%
2	Euro	24%
2	Democracy	24%

		Euro Zone
1	Euro	47%
2	Freedom to travel, study and work anywhere in the EU	41%
3	Waste of money	31%

		Non Euro
1	Freedom to travel, study and work anywhere in the EU	41%
2	Waste of money	23%
3	Bureaucracy	22%

Top 3 in the EU27, EU15, NMS12, the eurozone and the non-eurozone

2. DEMOCRACY IN THE EUROPEAN UNION

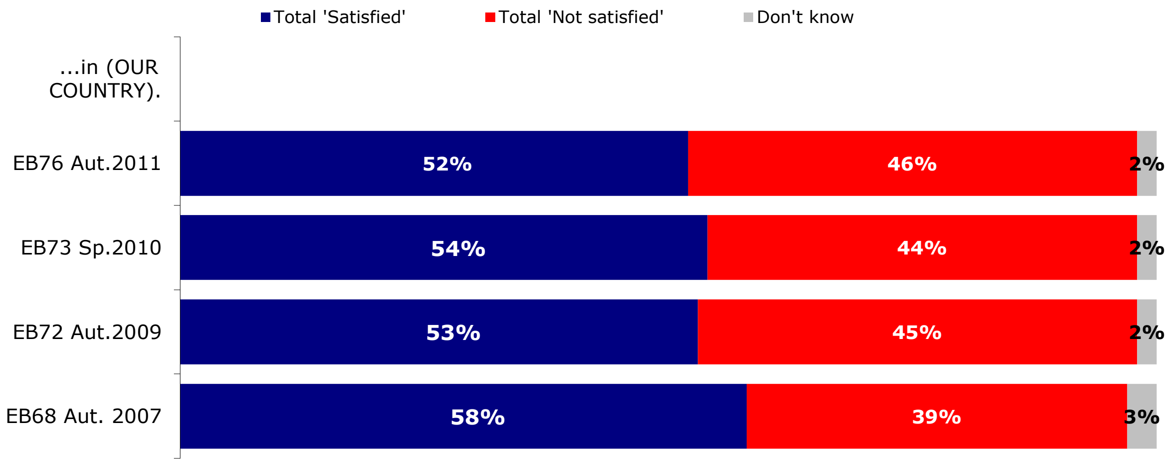
2.1 Perceptions of how national and European democracy work

The way in which democracy works at national level

52% of Europeans are now satisfied with the way democracy works in their country, while 46% are dissatisfied and 2% did not express an opinion[29].

The satisfied-dissatisfied ratio has narrowed in comparison with the previous Eurobarometer surveys. The proportion of satisfied respondents has fallen by two percentage points since the survey of spring 2010 (EB73) and by six percentage points in comparison with the autumn 2007 survey (EB68). At the same time, negative perceptions of the way national democracy works have increased by two and seven percentage points respectively.

QA18a On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works ...?
-% EU

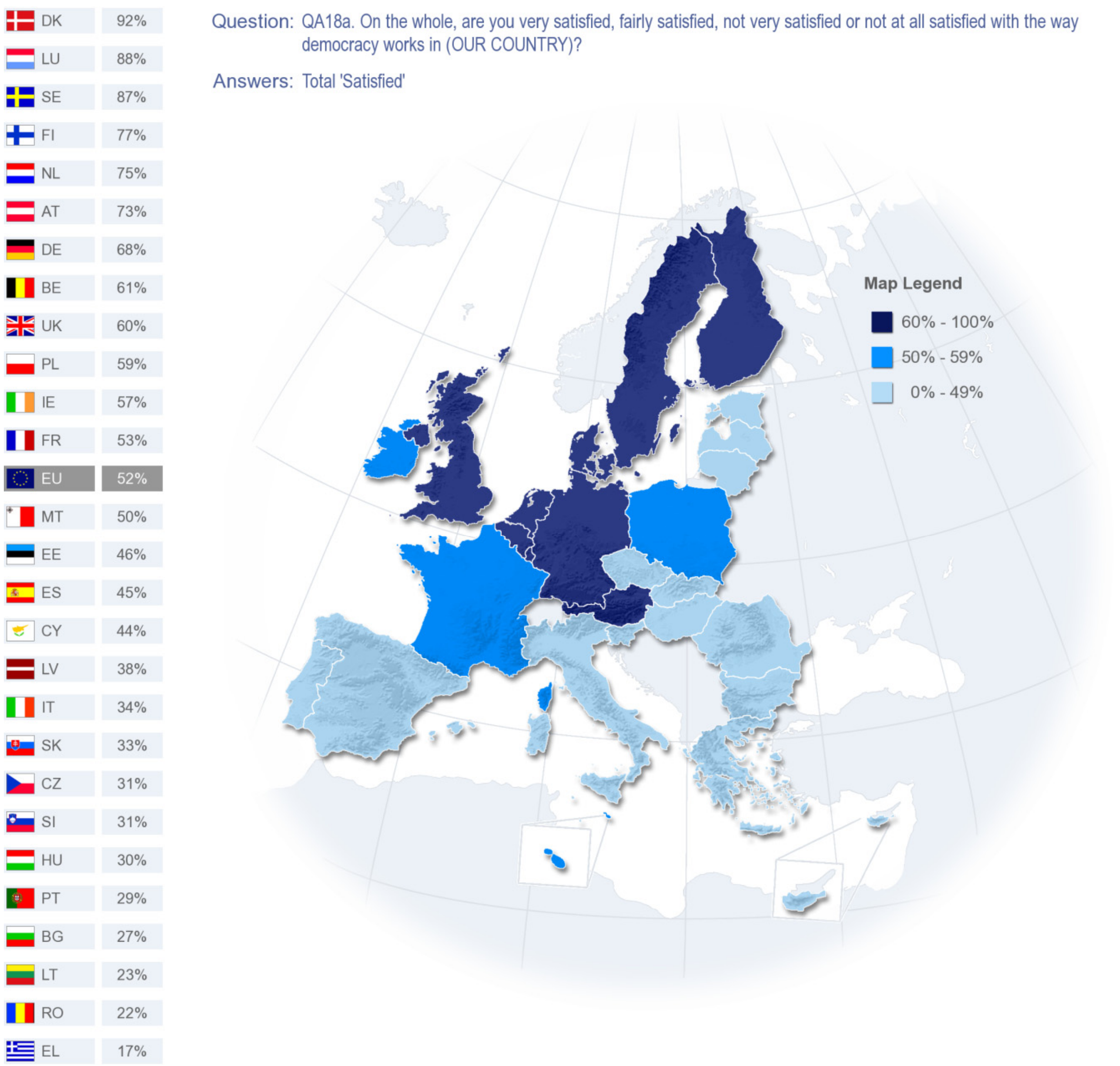


A majority of respondents in 13 of the 27 EU countries are satisfied with the way democracy works in their country, with the highest scores being recorded in the Nordic countries (92% in Denmark, 87% in Sweden and 77% in Finland), the Benelux countries (88% in Luxembourg, 75% in the Netherlands and 61% in Belgium), as well as in Austria (73%) and Germany (68%). It is noteworthy that, despite the absence of a government in their country[30], a majority of respondents in Belgium are still positive about the way democracy works in their country.

[29] 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)?
[30] The survey was carried out from 5 to 20 November 2011, before Elio di Rupo's government was sworn in on 6 December 2011.

On the other hand, a strong majority of respondents in 14 Member States are dissatisfied, with the highest scores being recorded in Greece (83%), Romania (76%), Lithuania (75%), Bulgaria (71%), Portugal (68%), Hungary (68%), the Czech Republic (68%) and Slovenia (68%).

The most significant changes for this indicator were recorded in five countries, namely the Czech Republic (-14 percentage points), Greece (-14), Italy (-13), Cyprus (-10) and Spain (-8), where levels of satisfaction with the way democracy works have fallen sharply since spring 2010. In Italy, whereas opinions were previously divided (47% satisfied versus 51% dissatisfied), a clear majority of respondents are now dissatisfied (65% dissatisfied versus 34% satisfied)[31]. In Spain, over the same period the situation has been reversed and the satisfied-dissatisfied ratio is now the exact opposite (53% satisfied versus 45% dissatisfied in spring 2010; 53% dissatisfied versus 45% satisfied in this survey).



31 Mario Monti was appointed President of the Italian Council of Ministers on 16 November 2011, i.e. a few days before the end of the fieldwork for this survey.

The socio-economic living conditions of the respondents strongly influence their views on how democracy works in their country. A majority of the people polled who place themselves at the top of the social scale and are part of the most advantaged categories are positive, whereas a majority of those at the bottom of the social scale and having financial difficulties are critical. We also note that the respondents who are not at all interested in politics are predominantly dissatisfied. This dissatisfaction is even more marked among those who consider that things are going in the wrong direction in their country.

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)?

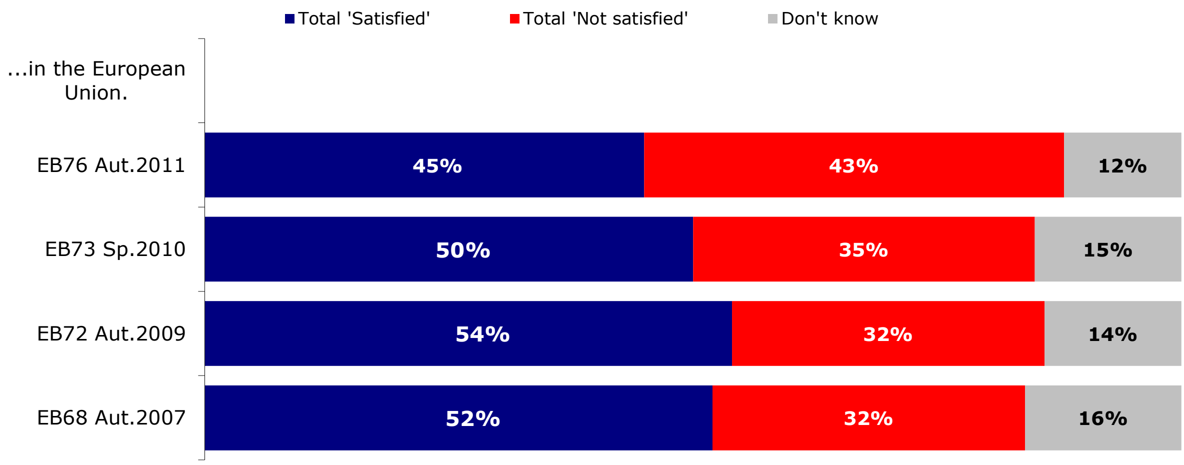
	Total 'Satisfied'	Total 'Not satisfied'	Don't know
EU27	52%	46%	2%
Respondent occupation scale			
Self- employed	51%	48%	1%
Managers	66%	33%	1%
Other white collars	53%	46%	1%
Manual workers	49%	49%	2%
House persons	46%	51%	3%
Unemployed	39%	59%	2%
Retired	51%	47%	2%
Students	58%	39%	3%
Difficulties paying bills			
Most of the time	31%	67%	2%
From time to time	43%	55%	2%
Almost never	60%	39%	1%
Political interest index			
Strong	54%	46%	0%
Average	55%	44%	1%
Low	51%	47%	2%
Not at all	42%	53%	5%
Things in country are going in...			
Right direction	82%	17%	1%
Wrong direction	38%	60%	2%
Neither	60%	38%	2%

The way democracy works in the European Union

Europeans are divided on the question of how democracy works in the European Union: 45% are satisfied compared with 43% who are dissatisfied, while 12% did not express an opinion[32]. There has been a clear deterioration in views on this subject: positive opinions have decreased by five percentage points in comparison with spring 2010, whereas negative opinions have increased by eight percentage points over the same period and the "DK" rate has fallen by three percentage points. Opinions therefore have shifted more perceptibly as regards the way democracy works in the European Union than in the case of national democracies.

The gap between satisfied and dissatisfied respondents has never been as narrow since Eurobarometer 54, carried out in autumn 2000[33]. The satisfaction-dissatisfaction ratio now stands at +2 compared with +15 in spring 2010, +22 in autumn 2009 and +20 in autumn 2007.

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



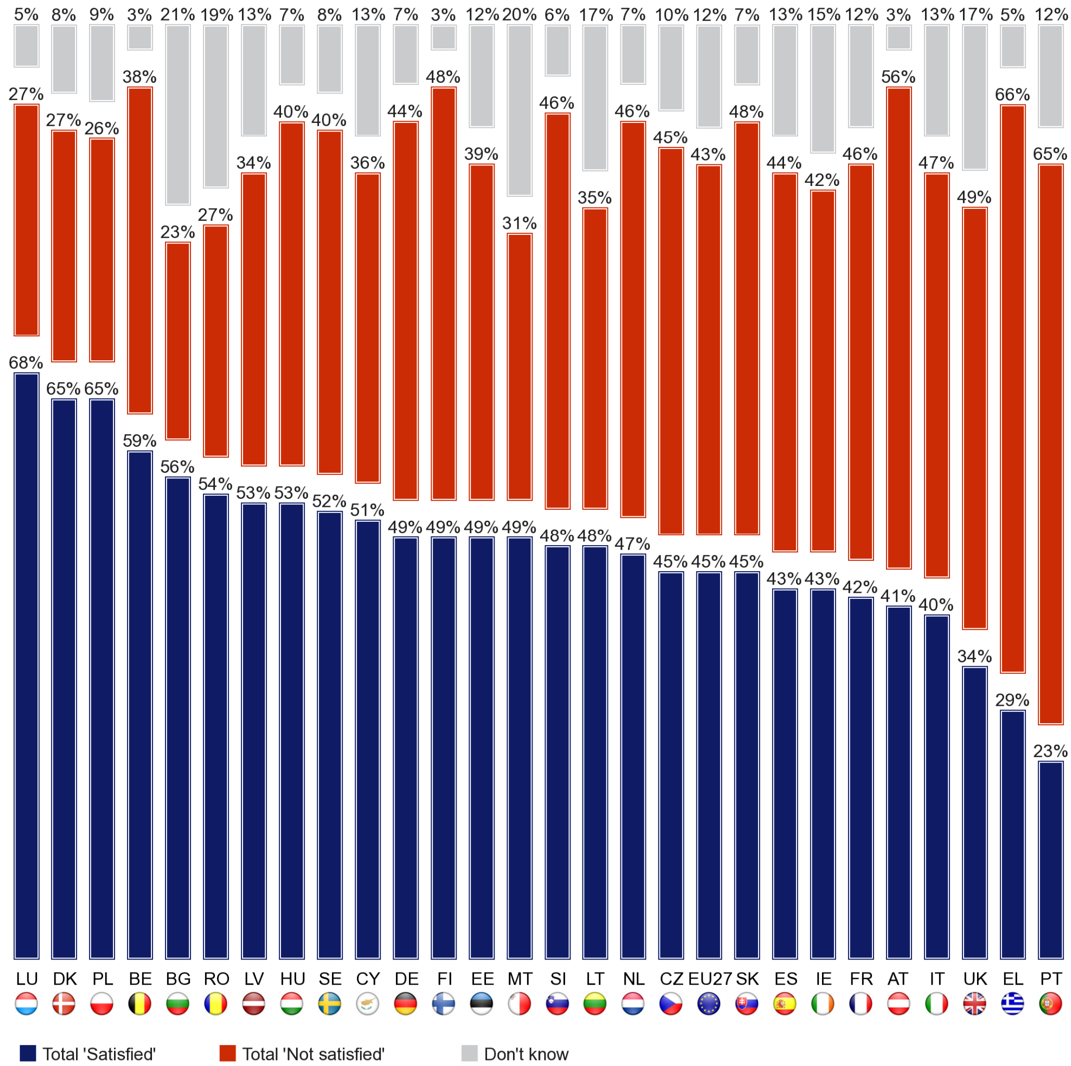
An absolute majority of respondents are satisfied in ten EU countries, with the highest scores being recorded in Luxembourg (68%), Poland (65%) and Denmark (65%), while a relative majority of respondents are satisfied in eight countries, with sometimes very tight satisfaction-dissatisfaction ratios, namely Finland (49% satisfied versus 48% dissatisfied), Slovenia (48% versus 46%), the Netherlands (47% versus 46%) and Ireland (43% versus 42%).

[32] 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 European Union?
[33] EB54: satisfied, 40%; dissatisfied, 43%. http://ec.europa.eu/public_opinion/archives/eb/eb54/eb54_en.pdf

Opinions are split down the middle in the Czech Republic (45% versus 45%). A relative majority of the people polled are dissatisfied in five countries, namely the United Kingdom (49% dissatisfied versus 34% satisfied), Slovakia (48% versus 45%), Italy (47% versus 40%), France (46% versus 42%) and Spain (44% versus 43%). These five countries are now part of the group of countries which are predominantly dissatisfied, whereas in spring 2010 they were in the opposite camp.

Finally, an absolute majority of respondents are dissatisfied in three countries, namely Greece (66%), Portugal (65%) and Austria (56%).

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



Perceptions of the way European democracy works have deteriorated in twenty EU countries, in particular in Italy (-13 percentage points), Ireland (-13), Greece (-12), Portugal (-11), Spain (-10), Slovakia (-10), the Czech Republic (-9) and Estonia (-8). Positive opinions are stable in Finland and Poland. They have gained ground in Germany (+1 percentage point), the Netherlands (+2), Romania (+2), Sweden (+3), Luxembourg (+4) and Bulgaria (+5).

As we noted for democracy at the national level, opinions on how democracy works within the EU are shaped by the economic and social living conditions of the people polled. For example, 53% of managers and 50% of those who do not have difficulties paying their bills are positive about the way democracy works in the European Union, compared with 38% of unemployed people and 33% of those who often struggle to pay their bills.

On the other hand, the respondent's interest in politics is not as influential as might have been expected in shaping opinions: although the respondents who are not at all interested in politics are more likely to be dissatisfied (46% versus 35%), the satisfaction-dissatisfaction ratio is balanced among the respondents who are very interested (47% versus 47%) and moderately interested (42% versus 42%) in politics. Opinions are therefore now divided among the respondents who have a strong interest in politics according to the interest in politics index, whereas a majority of them were satisfied in spring 2010 (51% versus 41%): dissatisfaction with the way European democracy works has therefore increased rather markedly among the most politically aware categories in the European Union.

The people who believe that the EU is going in the right direction are the most likely to be satisfied (77%, versus 19%), whereas only a minority of those who consider that the EU is going in the wrong direction are satisfied (35%, versus 57%).

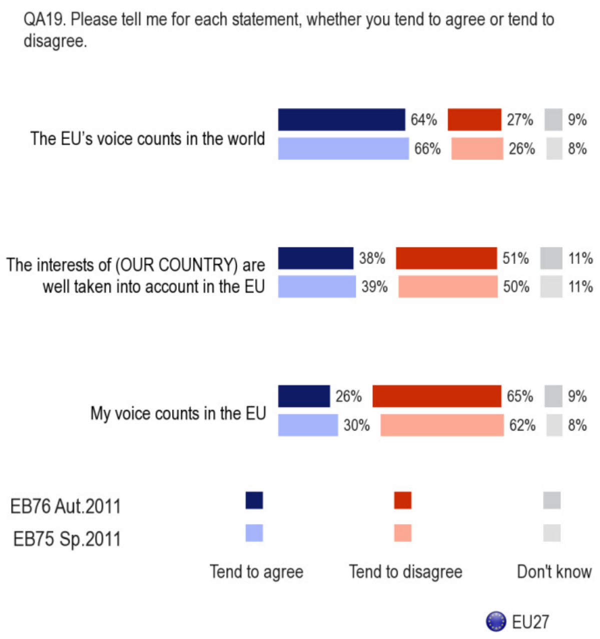
There are significant cleavages depending on whether or not the respondents trust the EU: whereas a large majority of the people who tend to trust the EU are satisfied with the way democracy works in the EU (73%, versus 21% who are dissatisfied), only 30% of those who do not trust the EU are satisfied (versus 60%).

Finally, a majority of the respondents who are in favour of European economic and monetary union with a single currency, the euro, are satisfied with the way democracy works in the EU (57%, versus 35%). On the other hand, only a third of those who are against economic and monetary union and the euro are satisfied with the way democracy works in the European Union (33%, versus 55%).

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

	Total 'Satisfied'	Total 'Not satisfied'	Don't know
EU27	45%	43%	12%
Respondent occupation scale			
Self- employed	46%	46%	8%
Managers	53%	40%	7%
Other white collars	49%	41%	10%
Manual workers	45%	46%	9%
House persons	43%	40%	17%
Unemployed	38%	49%	13%
Retired	40%	45%	15%
Students	56%	34%	10%
Difficulties paying bills			
Most of the time	33%	54%	13%
From time to time	42%	46%	12%
Almost never	50%	39%	11%
Political interest index			
Strong	47%	47%	6%
Average	50%	42%	8%
Low	42%	42%	16%
Not at all	35%	46%	19%
Things in the EU are going in...			
Right direction	77%	19%	4%
Wrong direction	35%	57%	8%
Neither	49%	38%	13%
Trust in EU			
Tend to trust	73%	21%	6%
Tend not to trust	30%	60%	10%
Euro			
In favour	57%	35%	8%
Against	33%	55%	12%

2.2 The extent to which personal, national and European interest are taken into account



The rise in dissatisfaction with the way European democracy works can be partly explained by the **growing feeling among European citizens that they do not have any influence within the European Union**[34]. Thus, 65% of the people polled consider that their voice does not count in the European Union, i.e. three percentage points higher than in spring 2011 and eight percentage points higher than in autumn 2010. Just over a quarter of respondents take the opposite view (26%), i.e. four percentage points less than in spring 2011 and seven percentage points less than in autumn 2010. Apart from Denmark, where an absolute majority of respondents (53%) are convinced that their voice counts, the idea that European citizens do not have any influence in the European Union is predominant in all the other Member States.

Overall, opinions on whether **national interests are taken into account by the EU** are unchanged. More than one in two Europeans (51%, +1 since spring 2011) consider that their country's interests are not adequately taken into account in the European Union, whereas 38% (-1 percentage point) take the opposite view and 11% (unchanged) did not express an opinion.

As in previous surveys, **there is a consensus among Europeans about the EU's role on the world stage:** 64% of the people polled consider that "the EU's voice counts in the world". Only 27% disagreed and 9% did not express an opinion. The changes noted for this question are minor.

An analysis by country shows that the view that **national interests are adequately taken into account in the EU** is the majority view in only five EU countries: Luxembourg (59%), Germany (53%), France (53%), Belgium (53%) and Denmark (50%). In this survey, Spain (42% versus 47%) and Poland (40% versus 51%) have joined the group of countries where a majority of respondents consider that their country's interests are not properly taken into account in the EU.

[34] QA19.2-4 Please tell me for each statement, whether you tend to agree or tend to disagree. The interests of (OUR COUNTRY) are well taken into account in the EU; My voice counts in the EU; The EU's voice counts in the world.

The most critical members of this group are Greece (78% consider that their country's interest are not properly taken into account in the EU), Latvia (74%), Slovenia (70%), the Czech Republic (69%), the United Kingdom (64%) and Austria (64%).

A socio-demographic analysis of the results reveals that a large majority of the people polled in all categories have the impression that their voice is not heard in the European Union. This feeling is particularly prevalent among the people who left school before the age of 16 (70%), unemployed people (70%) and those who struggle to pay their bills most of the time (75%).

The respondents the most likely to consider that their voice counts in the EU are those who trust the EU (43% believe that their voice counts in the EU, versus 49% who "disagree"). On the other hand, less than a fifth of the people who do not trust the EU share this opinion (18%, versus 76%).

Similarly, this feeling of "personal self-efficacy" is more pronounced among the respondents who are in favour of the euro (35%, versus 17% of those who are against the euro).

QA19.3 Please tell me for each statement, whether you tend to agree or tend to disagree.

My voice counts in the EU

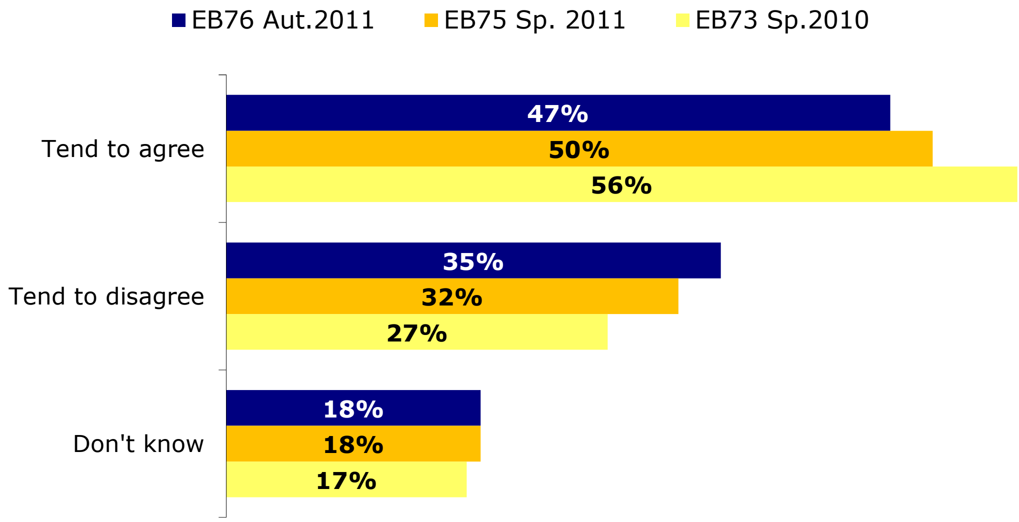
	Tend to agree	Tend to disagree	Don't know
EU27	26%	65%	9%
Gender			
Male	28%	65%	7%
Female	25%	66%	9%
Age			
15-24	27%	63%	10%
25-39	27%	66%	7%
40-54	26%	66%	8%
55 +	27%	64%	9%
Education (End of)			
15-	19%	70%	11%
16-19	26%	66%	8%
20+	34%	60%	6%
Still studying	27%	62%	11%
Respondent occupation scale			
Self- employed	24%	67%	9%
Managers	35%	59%	6%
Other white collars	27%	65%	8%
Manual workers	24%	68%	8%
House persons	25%	64%	11%
Unemployed	22%	70%	8%
Retired	26%	65%	9%
Students	27%	62%	11%
Difficulties paying bills			
Most of the time	17%	75%	8%
From time to time	22%	68%	10%
Almost never	31%	62%	7%
Trust in EU			
Tend to trust	43%	49%	8%
Tend not to trust	18%	76%	6%
Euro			
In favour	35%	57%	8%
Against	17%	77%	6%

3. EUROPEANS AND GLOBALISATION

3.1 Globalisation, an opportunity for economic growth?

– Globalisation is still viewed positively –

QA19a.5 Please tell me for each statement, whether you tend to agree or tend to disagree.
Globalisation is an opportunity for economic growth



For almost one in two Europeans (47%) globalisation represents an opportunity for economic growth, while 35% take the opposite view and 18% did not express an opinion. This positive perception of globalisation has fallen by three percentage points since spring 2011 and by nine percentage points since spring 2010. Negative perceptions of globalisation have increased by three percentage points since spring 2011 and by eight percentage points since spring 2010. In one and a half years, the difference between positive and negative perceptions has fallen from +29 to +12. The previous report[35] highlighted a negative trend as regards the image of globalisation and that trend is still perceptible in this report, even if it is less pronounced[36].

Negative perceptions of globalisation now outweigh positive perceptions in six countries, compared with only three in spring 2011: Greece (62%), the Czech Republic (50%) and Cyprus (49%) have now been joined by France (52%), Italy (46%) and Portugal. However, in Portugal, the opinion ratio is very narrow (38% versus 37%). In all the other countries, a majority of respondents are positive about globalisation, with the highest scores being recorded, as was the case in the spring 2011 survey, in the Nordic countries (76% in Denmark, 74% in Sweden and 66% in Finland), the Netherlands (70%), Germany (60%) and Belgium (56%).

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[35] EB75, spring 2011 http://ec.europa.eu/public_opinion/archives/eb/eb75/eb75_en.pdf
[36] QA19.5 Please tell me for each statement, whether you tend to agree or tend to disagree. Globalisation is an opportunity for economic growth.

Perceptions of globalisation have deteriorated in 20 EU countries, in particular in France (-8 percentage points), Italy (-7), Malta (-7) and Portugal (-7). Positive perceptions of globalisation are unchanged in Sweden, Poland, Austria and Greece. Finally, they have increased very slightly in the Netherlands (+1 percentage point), Lithuania (+1) and Bulgaria (+2).

There is still a significant socio-democratic division as regards opinions on globalisation, with young people, the most educated and socially and economically advantaged groups being predominantly positive about globalisation. 56% of those aged 15 to 24, 59% of students, 60% of managers, 53% of the people who almost never have difficulties paying their bills and 57% of those who place themselves at the top of the social scale see globalisation as an opportunity for economic growth, versus 42% of those aged 55 or over, 33% of people who left school before the age of 16, 41% of unemployed people, 33% of those who struggle to pay their bills most of the time and 37% of those who place themselves at the bottom of the social scale.

Respondents who trust the EU (63%) and those who support the euro (56%) also see globalisation as an opportunity for growth.

QA19.5 Please tell me for each statement, whether you tend to agree or tend to disagree.

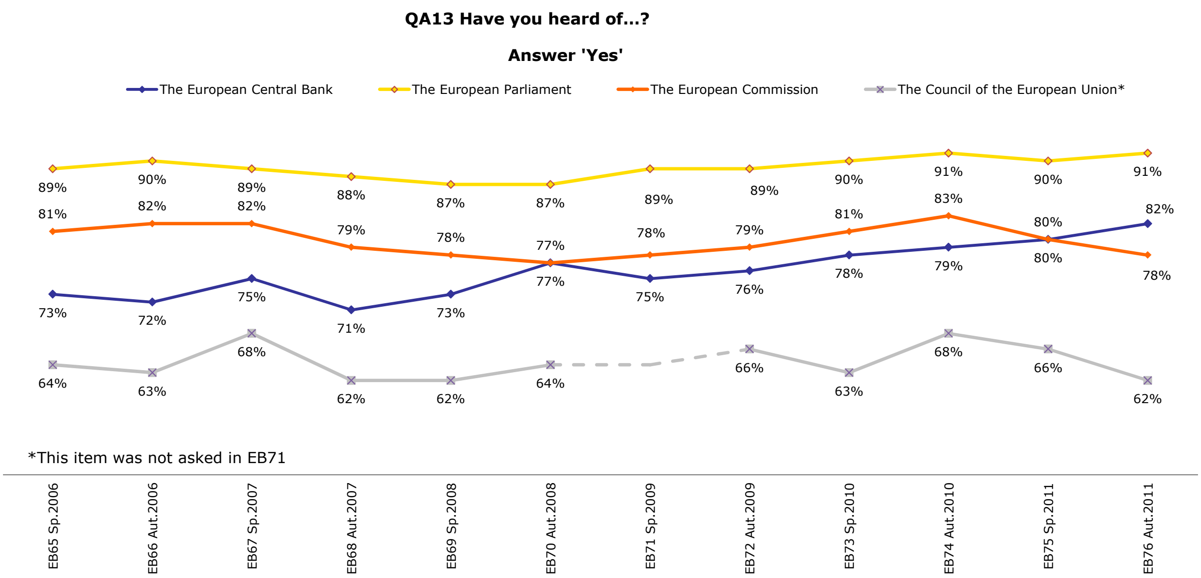
Globalisation is an opportunity for economic growth

	Tend to agree	Tend to disagree	Don't know
EU27	47%	35%	18%
Age			
15-24	56%	28%	16%
25-39	50%	35%	15%
40-54	47%	38%	15%
55 +	42%	36%	22%
Education (End of)			
15-	33%	38%	29%
16-19	46%	38%	16%
20+	55%	33%	12%
Still studying	59%	25%	16%
Respondent occupation scale			
Self- employed	47%	40%	13%
Managers	60%	31%	9%
Other white collars	53%	34%	13%
Manual workers	45%	40%	15%
House persons	38%	32%	30%
Unemployed	41%	39%	20%
Retired	41%	36%	23%
Students	59%	25%	16%
Difficulties paying bills			
Most of the time	33%	45%	22%
From time to time	41%	39%	20%
Almost never	53%	32%	15%
Self-positioning on the social scale			
Low (1-4)	37%	39%	24%
Medium (5-6)	46%	37%	17%
High (7-10)	57%	30%	13%
Trust in EU			
Tend to trust	63%	24%	13%
Tend not to trust	40%	44%	16%
Euro			
In favour	56%	30%	14%
Against	40%	42%	18%

4. THE EUROPEAN INSTITUTIONS

4.1 Awareness of European institutions and trust in them

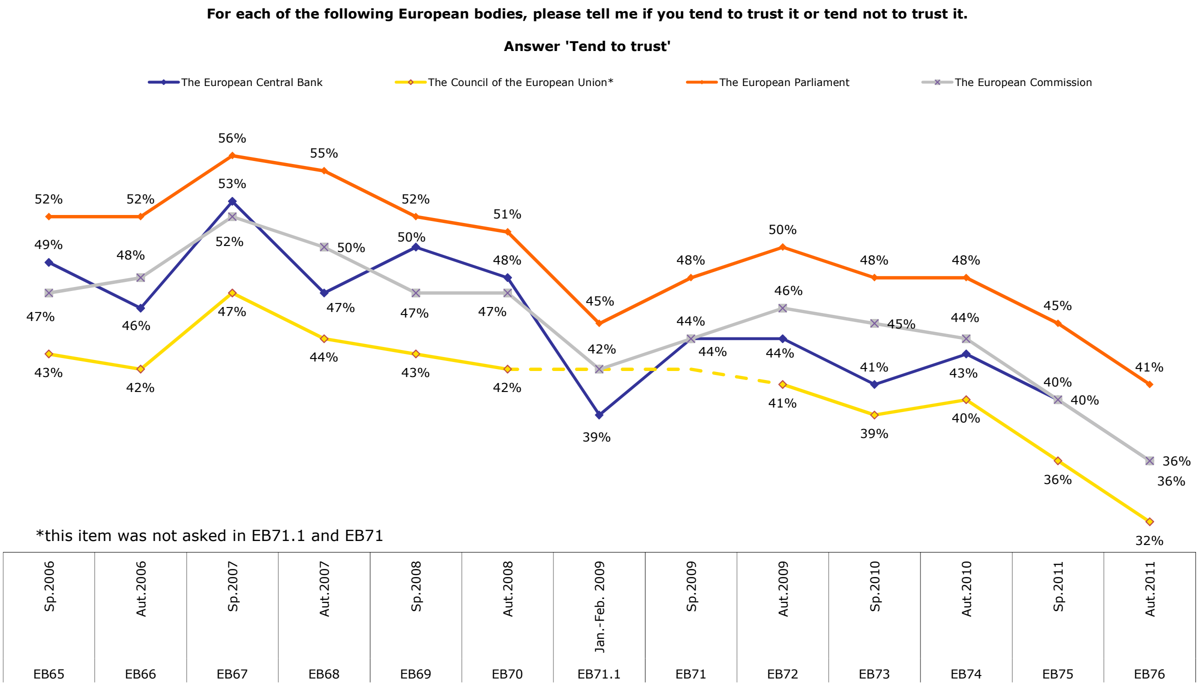
The European Parliament remains the best-known European institution with a score of 91% (+1 percentage point since spring 2010). As a result of the strong media coverage at the current time because of the financial and economic crisis, more people have now heard of the European Central Bank (82%, +2 percentage points), although, as we will see later in this report, this is not synonymous with an increase in popularity. Conversely, awareness of the European Commission has fallen by two percentage points to 78%, while that of the Council of the European Union has fallen by four percentage points, to 62%[37].



The Eurobarometer of spring 2011 (EB75) had been characterised by a fall in the trust ratings of the main European institutions. The latest survey shows that this trend has intensified. The trust ratings of each of the four institutions surveyed have fallen by four percentage points in each case. Due to the change in "DK" rates, the increase in distrust is even more pronounced that the decrease in trust: distrust has increased by eight percentage points in the case of the European Central bank, by seven percentage points for the European Parliament and by six percentage points for the European Commission and the Council of the European Union.

[37] QA13.1-4 Have you heard of...? The European Parliament/The European Commission/The European Central Bank/The Council of the European Union

This double trend has given rise to an unprecedented situation: for the first time, distrust outweighs trust for the four European institutions surveyed[38].
In general, this increase in distrust between spring and autumn 2011 is particularly pronounced in the United Kingdom, Ireland, France, Belgium, the Netherlands and Spain.



The European Parliament

In the case of the European Parliament, distrust outweighs trust for the first time in the history of the Eurobarometer surveys. 41% of Europeans (-4 percentage points) trust the European Parliament, whereas 45% (+7) distrust it and 14% (-3) did not express an opinion. The trust-distrust ratio has therefore deteriorated from +7 in spring 2011 to -4 in autumn 2011.

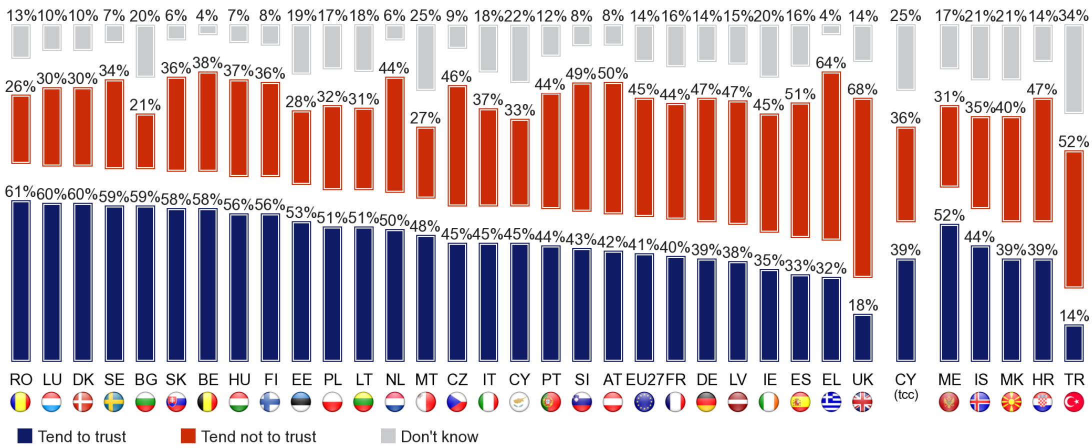
However, a majority of respondents trust the European Parliament in 16 EU countries (Belgium, Bulgaria, Denmark, Estonia, Italy, Cyprus, Lithuania, Luxembourg, Hungary, Malta, the Netherlands, Poland, Romania, Slovakia, Finland and Sweden), with the highest scores being recorded in Romania (61%), Denmark (60%) and Luxembourg (60%), whereas it was the majority opinion in 22 countries in spring 2011. Distrust outweighs trust in 10 EU countries: the United Kingdom (68% versus 18%), Greece (64% versus 32%), Slovenia (49% versus 43%), Spain (51% versus 33%), Latvia (47% versus 38%), as was the case in spring 2011, plus Austria (50% versus 42%), France (44% versus 40%), Ireland (45% versus 35%), Germany (47% versus 39%) and the Czech Republic, with the smallest possible majority (46% versus 45%), which have now joined this group. The trust-distrust ratio is balanced in Portugal (44% versus 44%).

[38] QA14.1-4 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.

With the exception of Romania and Bulgaria, where trust has increased by three percentage points, the fall in trust and the parallel increase in distrust are common to all EU countries. Distrust has increased the most in Ireland (+12 percentage points), the United Kingdom (+11), the Netherlands (+10), Spain (+9), France (+8) and Belgium (+8).

Trust in the European Parliament is far higher in the NMS12 countries than in the EU15 countries (a trust rating of 53% for the former, unchanged since spring 2011, versus 38% for the latter, -5 percentage points). On the other hand, the trust ratings are exactly the same in the eurozone countries (41%, -5 percentage points) and in the non-eurozone countries (41%, -2 percentage points).

QA14.1. 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



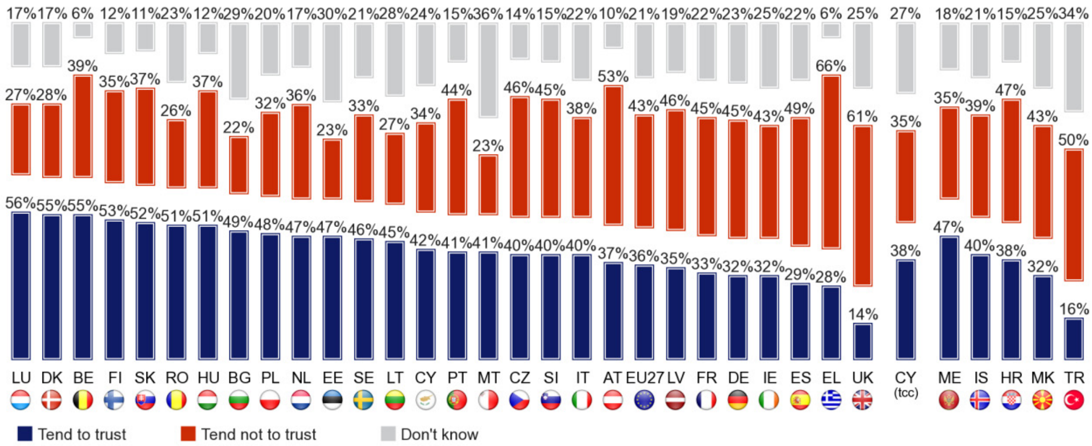
The European Commission

The European Commission's trust-distrust ratio has also deteriorated and, as for the European Parliament, distrust now outweighs trust. With a score of 36%, trust has fallen by four percentage points since spring 2011, while distrust has increased by two percentage points to 21%. In one year, trust in the European Commission has fallen by eight percentage points.

For this indicator, there is a strong difference between the NMS12 countries, where a majority of respondents trust the European Commission (48% versus 32%), and the EU15 countries, where distrust is predominant in almost symmetrically inverse proportions (46% versus 33%). On the other hand, there are very few differences between the eurozone countries (36% trust it, versus 44%) and the non-eurozone countries (36% versus 42%).

Trust is predominant in 16 countries, the same as those where a majority of respondents trust the European Parliament, whereas it was the majority opinion in 21 Member States in spring 2011. In this group, trust exceeds the absolute majority in Luxembourg (56%), Belgium (55%), Denmark (55%), Finland (53%), Slovakia (52%), Romania (51%) and Hungary (51%); it is also the case in Italy (40% versus 38%), but in a far less clear-cut way. Distrust outweighs trust in 11 countries: the Czech Republic (46% versus 40%), France (45% versus 33%), Portugal (44% versus 41%), Ireland (43% versus 32%) and Slovenia (45% versus 40%) have thus joined Greece (66% versus 28%), the United Kingdom (61% versus 14%), Austria (53% versus 37%), Spain (49% versus 29%), Latvia (46% versus 35%) and Germany (45% versus 32%), where distrust was already the majority view in EB75 of spring 2011.

QA14.2. For each of the following European bodies, please tell me if you tend to trust it or tend not to trust it.
The European Commission



The trust-distrust ratio has deteriorated in 25 EU countries, with the biggest increase in distrust being recorded in Ireland (+12 percentage points), the United Kingdom (+10), France (+10), Spain (+8) and the Netherlands (+8). This ratio is stable in only two countries, where trust levels are high, namely Denmark and Luxembourg.

The European Central Bank

The fall in positive opinions noted for the previous institutions also extends to the European Central Bank. Its trust rating is now 36%, down by four percentage points, while 46% (+8) now distrust it and 18% (-4) of respondents did not express an opinion. This is the worst trust-distrust ratio ever measured for the European Central Bank in the Eurobarometer since this item was first included in EB51 of spring 1999.

There are no significant differences in trust ratings between the eurozone countries (37% trust it, versus 47%) and the non-eurozone countries (35% versus 43%). On the other hand, the difference is far more pronounced between the NMS12 countries (43% trust it, versus 34%) and the EU15 countries (49% distrust it, versus 34%).

The majority of respondents trust the ECB in 15 Member States, with an absolute majority in seven countries, namely Denmark (64%), Finland (62%), the Netherlands (59%), Slovakia (57%), Sweden (56%), Luxembourg (53%) and Belgium (51%), and a relative majority in the Czech Republic (47%), Bulgaria (46%), Estonia (45%), Cyprus and Romania (44%), Lithuania (43%), Poland (41%) and Malta (40%).

Distrust outweighs trust in 11 Member States, compared to seven in spring 2011. It has intensified in Greece (72% versus 22%), the United Kingdom (59% versus 18%), Spain (57% versus 29%), Ireland (53% versus 26%), France (48% versus 30%), Portugal (47% versus 39%) and Latvia (44% versus 33%). In addition, in this survey, distrust is now the majority opinion in Germany (49% versus 37%), Slovenia (49% versus 37%), Hungary (46% versus 39%) and Italy (42% versus 37%). For the first time, therefore, a relative majority of respondents in Germany distrust the European Central Bank.
Finally, opinions are split down the middle in Austria: 46% tend to trust the European Central Bank, versus 46% who trust it.

The trust-distrust ratio has deteriorated in all 27 EU countries, with the biggest increases in distrust being recorded in the United Kingdom (+13 percentage points), Ireland (+13), Spain (+10), Germany (+10), France (+10), Italy (+8) and Hungary (+8). In Hungary, although distrust has increased less significantly (+6), trust has fallen considerably (-11).

The Council of the European Union

32% of Europeans (-4 percentage points) trust the Council of the European Union, whereas 41% (+6) distrust it. The "DK" rate has fallen by two percentage points, but remains high at 27%.

A majority of respondents in 14 Member States trust it, notably in Slovakia (50%), Romania (49%), Belgium (47%) and Hungary (46%). On the other hand, distrust is the predominant opinion in 12 Member States and is the most pronounced in Greece (64%), the United Kingdom (54%) and Austria (50%). Finally, opinions are split down the middle on this question in the Netherlands: 39% trust the Council of the European Union, versus 39% who distrust it.

Distrust has gained the most ground in Ireland (+12 percentage points), the Netherlands (+10), Spain (+9), the United Kingdom (+9), Slovakia (+8), Belgium (+8) and France (+8).

Awareness and trust

An analysis of the results according to levels of awareness reveals that the trust rating for each of these institutions is far higher among the people who have heard of them: that is true for the European Parliament (44% of those who are familiar with the institution trust it, versus 15% of those who have not heard of it), the European Commission (43%, versus 11%), the Council of the European union (44%, versus 12%), and the European Central Bank (42%, versus 11%).

We also note that levels of distrust are fairly similar, irrespective of whether the respondents have heard of the European institutions, even if distrust tends to be slightly more pronounced among those who are not familiar with them: 42% to 51% of the people polled who have not heard of these institutions are negative about them. This is true for all four institutions: the European Parliament (44% of distrust, versus 51% among those who have not heard of this institution), the European Commission (43%, versus 47%), the Council of the European Union (41%, versus 42%), and the European Central bank (45%, versus 47%).

QA14 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

	Tend to trust	Tend not to trust	Don't know
UE27	41%	45%	14%
Already heard of the European Parliament			
Oui	44%	44%	12%
Non	15%	51%	34%

The European Commission

	Tend to trust	Tend not to trust	Don't know
UE27	36%	43%	21%
Already heard of the European Commission			
Oui	43%	43%	14%
Non	11%	47%	42%

The Council of the European Union

	Tend to trust	Tend not to trust	Don't know
UE27	32%	41%	27%
Already heard of the Council of the European Union			
Oui	44%	41%	15%
Non	12%	42%	46%

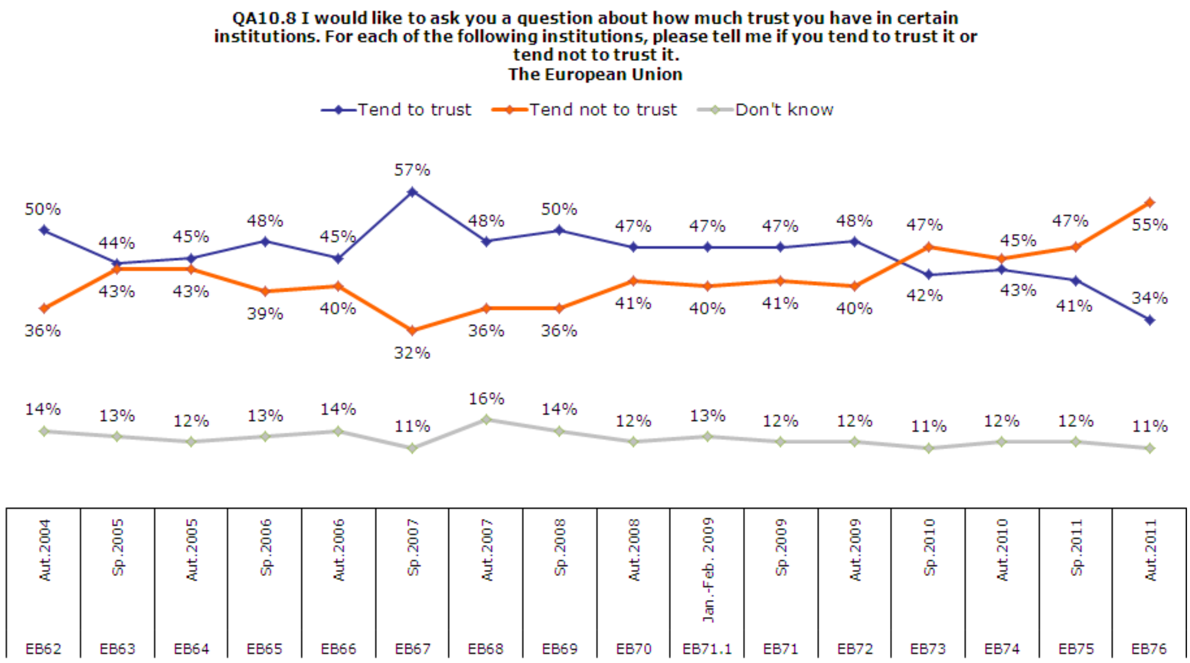
The European Central Bank

	Tend to trust	Tend not to trust	Don't know
UE27	36%	46%	18%
Already heard of the European Central Bank			
Oui	42%	45%	13%
Non	11%	47%	42%

4.2 Trust in the European Union

- For the first time, an absolute majority of Europeans do not trust the European Union –

34% of Europeans trust the European Union, i.e. a fall of 7 percentage points since EB75 of spring 2011, while 55% (+8 percentage points) do not trust it and 11% did not express an opinion (-1)[39]. Although distrust of the EU has outweighed trust since the survey of spring 2010 (EB73), this is the first time that distrust has exceeded the 50% mark. This is the worst ever Standard Eurobarometer trust-distrust ratio measured for the European Union.

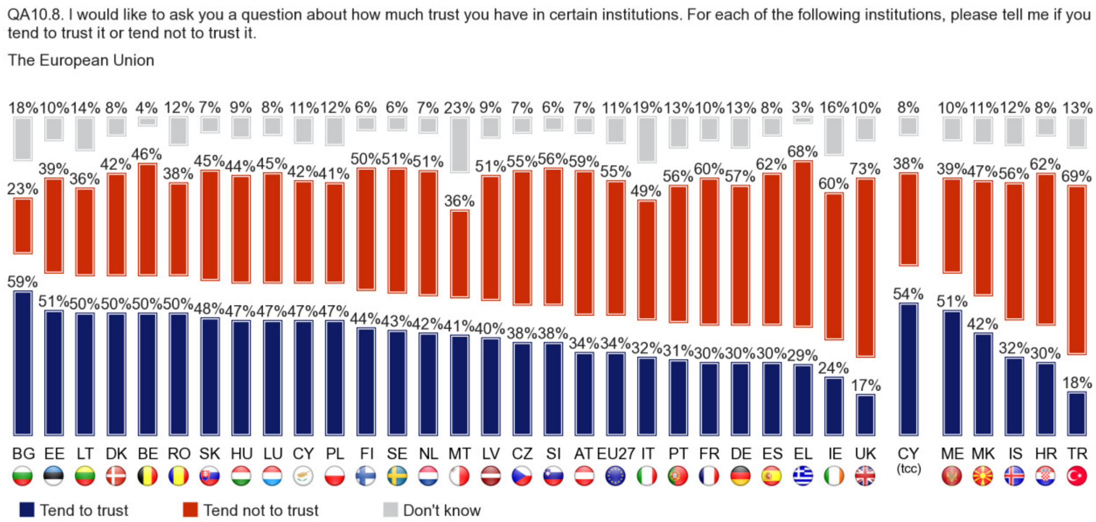


A majority of the people polled in the NMS12 countries trust the EU (48% versus 41%) whereas a majority of respondents in the EU15 countries distrust it (59% versus 30%). Distrust outweighs trust in the eurozone countries (56% versus 32%) and the non-eurozone countries (53% versus 37%) alike.

Trust in the EU is now the predominant opinion in only 12 countries compared with 16 in spring 2011. Levels of trust are equal to or higher than 50% in six Member States, compared with 14 countries six months earlier. The highest trust rating was recorded in Bulgaria (59%), which is the only country where the trust-distrust ratio is stable in comparison with spring 2011. An absolute majority of respondents trust the EU in the following countries, although levels of trust have fallen, sometimes significantly: Estonia (51%, -10 percentage points), Lithuania (50%, -2), Denmark (50%, -2), Belgium (50%, -11) and Romania (50%, -12).

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

A relative majority of respondents trust the EU, with however, once again, a perceptibly strong downward trend, in Slovakia (48%, -13 percentage points), Hungary (47%, -7), Luxembourg (47%, -5), Cyprus (47%, -5), Poland (47%, -5) and Malta (41%, -11).



A majority of respondents in 15 EU countries now distrust the EU, compared to 10 countries in spring 2011 (EB75) and six in autumn 2010 (EB74). As a result of a sometimes very significant increase in distrust, Ireland (60% distrust it, +21 percentage points), Sweden (51%, +5), the Netherlands (51%, +11), Finland (50%, +7) and Italy (49%, +9) have now joined the group of countries where distrust was already predominant in the previous survey. Distrust has intensified in the United Kingdom (73%, +10 percentage points), Greece (68%, +1), Spain (62%, +13), France (60%, +10), Austria (59%, +9), Germany (57%, +2), Portugal (56%, +10), Slovenia (56%, +7), the Czech Republic (55%, +7) and Latvia (51%, +3). In total, in 14 of the 15 countries where distrust is predominant, the level of distrust is equal to or exceeds 50%, the exception being Italy (49% distrust it, versus 32% who trust it).

Trust in the European Union has deteriorated sharply in the candidate countries. A majority of respondents still trust it in Montenegro (51%), despite a fall of three percentage points. As a result of a fall of 13 percentage points in trust and a parallel increase of 14 percentage points in distrust, trust is now the minority opinion in the Former Yugoslav Republic of Macedonia (42% versus 47%). Finally, distrust is still the majority opinion and has even intensified in Turkey (69%, +6 percentage points), Croatia (62%, +8) and Iceland (56%, +7).

A socio-demographic analysis shows that the most advantaged social classes and the young generations are becoming increasingly distrustful of the European Union. Traditionally in the Standard Eurobarometer surveys, the most socially and financially advantaged categories and the young generations have tended to trust the European Union, whereas a majority of the more modest categories and older respondents have tended to distrust it.

However, in autumn 2011, although there are some differences of intensity, distrust is now predominant in all social categories, irrespective of the respondent's age, level of education, socio-professional category or economic situation. At the same time, distrust has intensified in the social categories where levels were already the highest: people aged 55 or over, manual workers, unemployed people and those who often struggle to pay their bills.

QA10.8 I would like to ask you a question about how much trust you have in certain institutions. For each of the following 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	
	EB75 Sp.2011	EB76 Aut.2011	EB75 Sp.2011	EB76 Aut.2011
EU27	41%	34%	47%	55%
Age				
15-24	53%	43%	35%	45%
25-39	43%	34%	46%	56%
40-54	39%	32%	51%	57%
55 +	37%	31%	50%	57%
Respondent occupation scale				
Self- employed	42%	32%	47%	57%
Managers	48%	42%	44%	50%
Other white collars	43%	38%	46%	53%
Manual workers	38%	31%	51%	58%
House persons	35%	29%	51%	57%
Unemployed	36%	29%	53%	61%
Retired	38%	31%	49%	56%
Students	57%	45%	30%	42%
Difficulties paying bills				
Most of the time	31%	24%	57%	65%
From time to time	38%	31%	50%	57%
Almost never	45%	37%	44%	53%

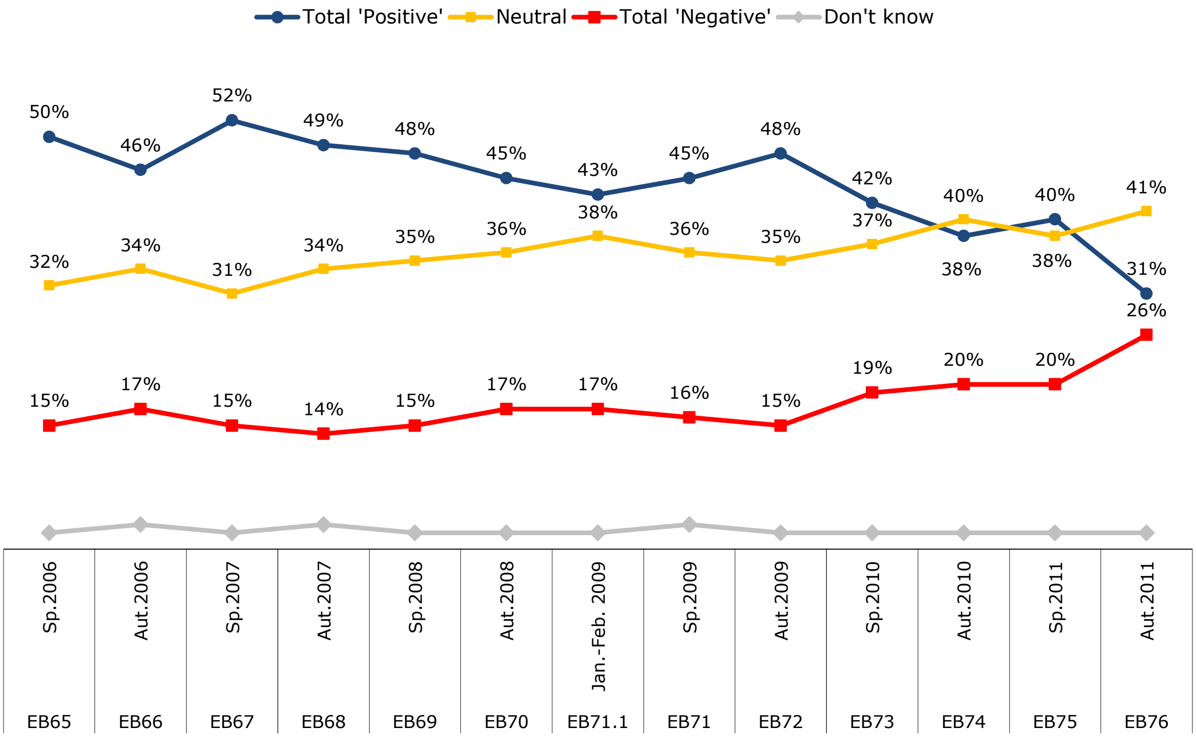
4.3 The European Union's image

– The EU's image has deteriorated sharply–

The deterioration in the European Union's trust rating has been accompanied by a significant deterioration in its image.

31% of Europeans now consider that the EU has a positive image, i.e. one percentage point less than in spring 2011, whereas 26% think that its image is negative (+6 percentage points), 41% (+3) consider that its image is neutral and 2% (unchanged) did not express an opinion[40].

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



The proportion of positive perceptions is above the European average (31%) in 12 EU countries (Bulgaria, Denmark, Ireland, France, Italy, Cyprus, Luxembourg, Malta, Poland, Romania, Slovenia and Slovakia), with the highest scores being recorded in Bulgaria (57%) and Romania (49%). Five countries (Belgium, Lithuania, Hungary, the Netherlands and Sweden) recorded scores equal to the European average.

10 Member States recorded scores below the European average, notably the United Kingdom (13%), Latvia (21%), Finland (22%) and Austria (25%).

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

Apart from Bulgaria, which recorded an increase of two percentage points, and Malta, with an unchanged score, positive opinions of the EU's image have declined in all countries. Moreover, there have been very significant falls in some countries, such as Ireland, where positive opinions have fallen by 17 percentage points, whereas last spring Ireland figured among the three countries that were the most positive about the EU's image. The other countries which recorded a sharp deterioration in perceptions of the EU's image, in excess of the deterioration measured for the EU as a whole, are Belgium (-16 percentage points), Spain (-14), Slovakia (-13), Lithuania (-11), the United Kingdom (-9), France (-9), Estonia (-9), Finland (-9), Portugal (-9), Germany (-8), Italy (-7), the Netherlands (-7) and Romania (-7).

A socio-demographic analysis shows that the European Union's image is perceived more positively by respondents having studied up to the age of 20 or beyond (38%), students (38%), managers (39%) and employees (38%), versus 31% of Europeans as a whole. People who are in favour of European economic and monetary union with a single currency (the euro) (43%) and, above all, people who trust the EU (62%), are more likely to consider that the EU's image is positive.

Conversely, for 34% of the people having completed their education before the age of 16, 30% of unemployed people and retired people and 37% of those who struggle to pay their bills most of the time, the EU conjures up a negative image, versus 26% of Europeans as a whole. Respondents who are against the euro (41%) and those who do not trust the European Union (42%) are more negative.

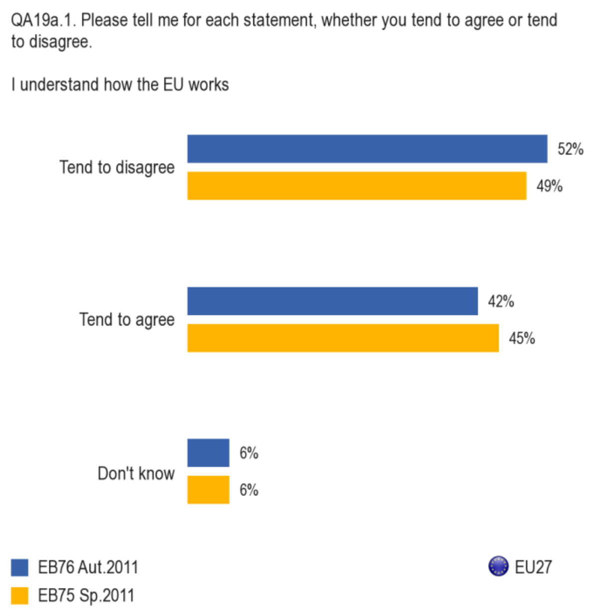
QA11 In general, does the EU conjure up for you a very positive, fairly positive, neutral, fairly negative or very negative image?

	Total 'Positive'	Neutral	Total 'Negative'	Don't know
EU27	31%	41%	26%	2%
Gender				
Male	33%	39%	27%	1%
Female	29%	43%	26%	2%
Age				
15-24	34%	45%	19%	2%
25-39	32%	43%	24%	1%
40-54	30%	41%	28%	1%
55 +	30%	38%	30%	2%
Education (End of)				
15-	24%	39%	34%	3%
16-19	29%	42%	28%	1%
20+	38%	40%	21%	1%
Still studying	38%	44%	16%	2%
Respondent occupation scale				
Self- employed	34%	39%	26%	1%
Managers	39%	41%	20%	-
Other white collars	38%	37%	24%	1%
Manual workers	26%	45%	28%	1%
House persons	28%	42%	27%	3%
Unemployed	26%	42%	30%	2%
Retired	29%	39%	30%	2%
Students	38%	44%	16%	2%
Difficulties paying bills				
Most of the time	23%	38%	37%	2%
From time to time	29%	42%	27%	2%
Almost never	34%	41%	23%	2%
Trust in EU				
Tend to trust	62%	33%	5%	-
Tend not to trust	14%	43%	42%	1%
Euro				
In favour	43%	41%	15%	1%
Against	17%	40%	41%	2%

5. THE WAY THE EUROPEAN UNION WORKS

5.1 Knowledge of how the European Union works

The feeling among Europeans that they do not understand how the European Union works has increased slightly since EB75 of spring 2011 and this view is now shared by an absolute majority of the people polled. Thus, 52% of Europeans (+3 percentage points) tend to disagree with the statement "I understand how the EU works", whereas 42% (-3 percentage points) tend to agree with it[41].



A majority of respondents in 10 EU countries declared that they know how the EU works (Denmark, Germany, Estonia, Cyprus, Lithuania, Luxembourg, Poland, Romania, Slovenia and Slovakia), with the highest scores being recorded in Poland (60%), Luxembourg (58%), Cyprus (58%) and Slovenia (57%). Opinions are split down the middle in Ireland (48% versus 48%) and Latvia (49% versus 49%).

On the other hand, a majority of the people polled in 15 other countries declared that they do not understand how the European Union works, with the highest scores being recorded in the United Kingdom (60%), France (59%), Spain (58%), Portugal (58%), Malta (58%), Sweden (56%) and the Czech Republic (54%).

Malta and the Czech Republic (+2 percentage points) are the only two countries where the feeling of being familiar with how the EU works has gained ground. The proportion of respondents agreeing with the statement is unchanged in Bulgaria, Germany, Ireland, Cyprus and Spain. Everywhere else, the proportion of respondents who understand how the EU works has lost ground, and notably more rapidly than the European average in Italy (-9 percentage points), the Netherlands (-7) and Sweden (-7).

An analysis of the answers according to attitudes concerning the European Union shows that an absolute majority of the people polled who trust the EU, or who consider that it conjures up a positive image, declared that they understand how the EU works (59% and 58% respectively "tend to agree"). Conversely, a large majority of those who do not trust the EU (59%) or consider that its image is negative (62%) "tend to disagree" with the statement "I understand how the EU works".

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

QA19.1 Please tell me for each statement, whether you tend to agree or tend to disagree.

I understand how the EU works

	Tend to agree	Tend to disagree	Don't know
EU27	42%	52%	6%
Trust in EU			
Tend to trust	58%	37%	5%
Tend not to trust	36%	59%	5%
Image of EU			
Positive	59%	36%	5%
Neutral	37%	56%	7%
Negative	34%	62%	4%

III. THE EUROPEAN UNION TODAY AND TOMORROW

1. THE EUROPEAN UNION'S COMPETENCES

When asked for their views on the most relevant decision-making level in ten or so policy areas, Europeans continue to favour action at European level for tackling global issues of security and border controls (fighting terrorism, defence and foreign affairs and immigration), protecting the environment and support for regions facing economic difficulties. Opinions are more divided as regards decision-making on agricultural and fishery issues. Finally, a majority of respondents continue to support decision-making at national level for taxation and social issues[42].

In terms of changes, this survey reveals a trend towards greater support for national decision-making and a symmetrical decrease in support for joint action at European level. This trend extends to all the policy areas surveyed, even if its scope remains limited.

The data comparisons are based on the spring 2010 survey (EB73) for "support for regions facing difficulties", "agriculture and fishery" and "social security", which had not been surveyed since that date, and on the autumn 2010 survey (EB74) for all the other policy areas. Finally, "reducing public debt" was surveyed for the first time in this survey.

Despite a slight fall, there is still widespread support among Europeans for joint decision-making within the EU for **fighting terrorism** (78%, -3 percentage points versus the autumn 2010 survey), **protecting the environment** (68%, -4), **defence and foreign affairs** (65%, -2) and **immigration** (60%, -2).

A majority of Europeans still support joint decision-making within the EU for **support for regions facing economic difficulties** (56%, -3 percentage points) and **agriculture and fishery** (49%, -2), but the gap with the proportion of respondents opting for national decision-making has shrunk considerably since spring 2010.

Support for national decision-making in the area of social and taxation policies has gained ground in this survey: a majority of Europeans want their government to take decisions on **pensions** (73%, +2 percentage points since autumn 2010), **taxation** (68%, unchanged), **social security** (68%, +3), **fighting unemployment** (58%, +2 percentage points since spring 2010) and **reducing public debt** (51%, surveyed for the first time in this survey).

[42] QA20.1-11. For each of the following areas, do you think that decisions should be made by the (NATIONALITY) Government, or made jointly within the EU?

Reducing public debt

Although in the European Union as a whole, a majority of respondents want national governments to take decisions on reducing public debt (51%, versus 44% for joint decision-making), it is to be noted that, in 11 countries, a majority of the people polled would prefer these decisions to be taken jointly within the EU. That is the case in Latvia (62% support joint European decision-making on reducing public debt), Lithuania (60%), Cyprus (60%), Portugal (57%), Ireland (55%), Greece (54%), Germany (53%), Italy (51%), Bulgaria (50%) and Spain (49%). Furthermore, a narrow majority of the people polled in the eurozone countries advocate joint-decision-making within the EU (49% versus 47%), whereas a clear majority of non-eurozone respondents believe that decisions should be made by their national government (59% versus 36%). This highlights the structural trend already noted in previous surveys, namely that the eurozone countries are always, irrespective of the policy area surveyed, more enthusiastic than non-eurozone countries about decision-making at European level.

Agriculture and fishery

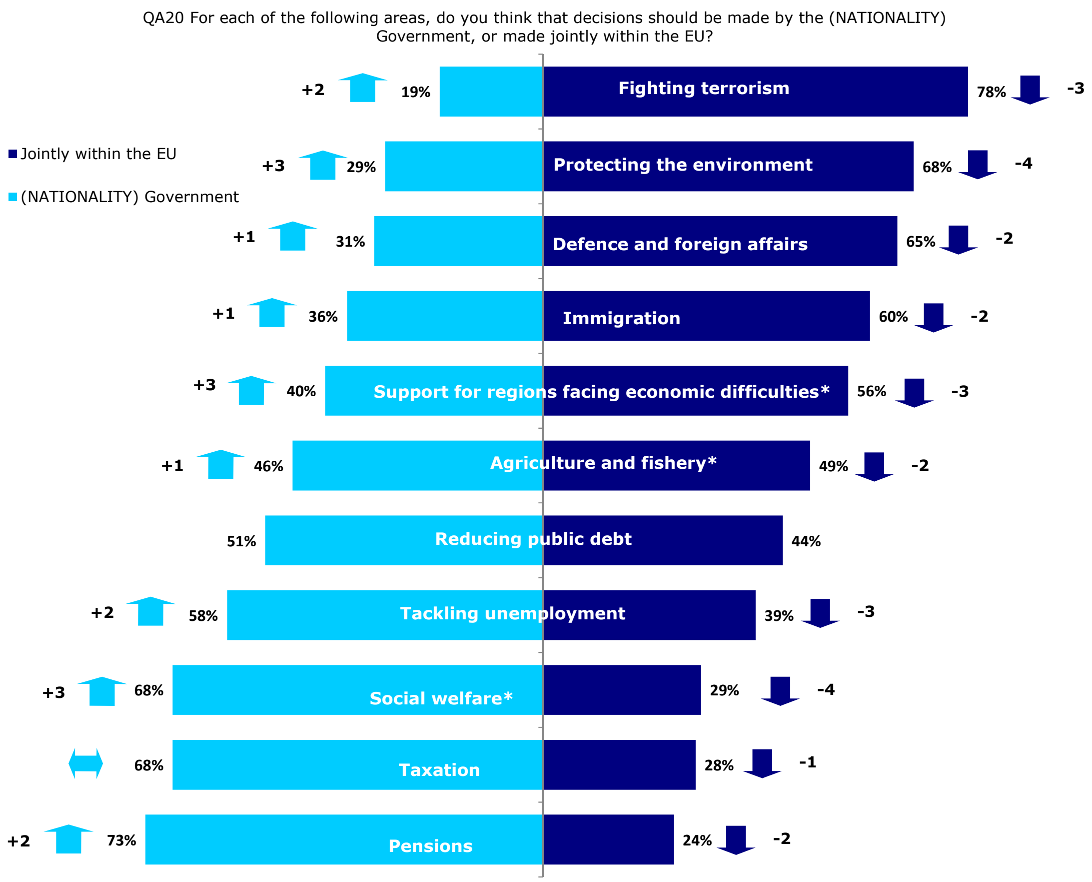
In the case of agriculture and fishery, the people polled in the EU15 countries (50% versus 45%) and in the eurozone countries (54% versus 41%) are more likely to opt for joint decision-making within the EU, whereas a majority of respondents in the NMS12 countries (51% versus 45%) and in the non-eurozone countries (55% versus 41%) favour national decision-making. A detailed analysis by country reveals that although a narrow majority of Europeans as a whole would prefer joint European decision-making (49%, versus 46% for national decision-making), a majority of respondents in 15 EU countries would prefer agricultural and fishery decisions to be taken at national level. The countries in question are Finland (76%), Austria (63%), the United Kingdom (62%), the Czech Republic (62%), Malta (62%), Greece (59%), Hungary (58%), Slovenia (58%), Romania (58%), Slovakia (56%), Bulgaria (54%), Sweden (54%), Estonia (53%), Ireland (50%) and Italy (46%).

Immigration

Six countries diverge significantly from the general European trend that sees a majority of respondents in favour of decisions on immigration being taken jointly within the EU (60%, versus 36% for national decision-making). The six countries are: the Nordic countries (71% in Finland, 57% in Denmark and 55% in Sweden), the United Kingdom (66%), Austria (64%) and Estonia (56%), where an absolute majority of the people polled would prefer decisions on immigration to be taken by their country’s government.

Defence and foreign affairs

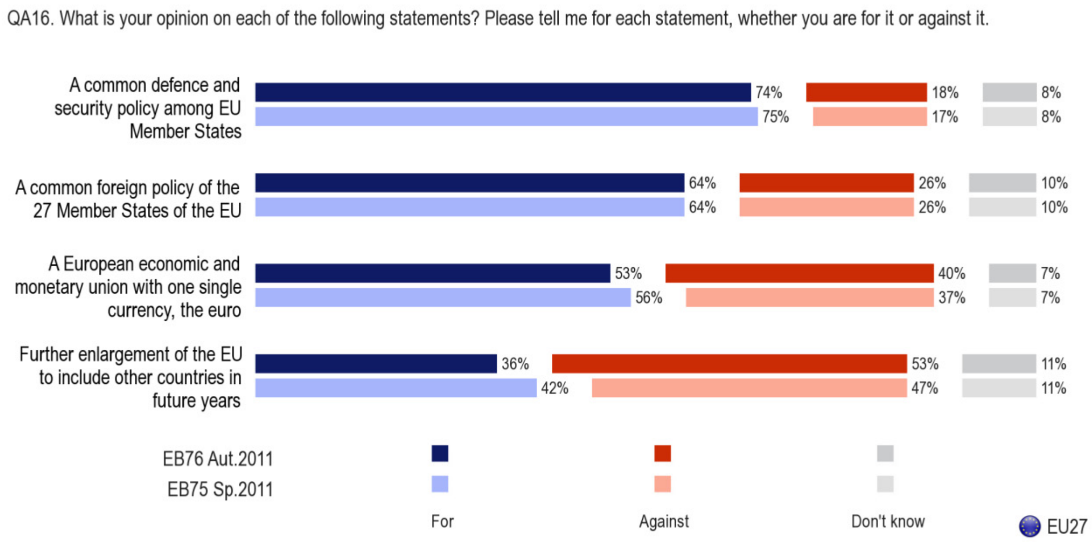
Three countries diverge from the general trend in their assessment of the most appropriate decision-making level for defence and foreign affairs. Whereas there is a large majority in the EU as a whole in favour of European decision-making (65%, versus 31% for national decision-making), a majority of people polled in Sweden (51%), the United Kingdom (59%) and, above all, Finland (76%) would prefer decisions to be taken by their country's government.



2. SUPPORT FOR EUROPEAN POLICIES

- A majority of respondents still support the euro;
on the other hand, support for further enlargement has fallen -

Not all European polices have been affected by the crisis of confidence which the European Union is experiencing. Support for the principles of a "common defence and security policy" and a "common foreign policy" remains strong, and is more or less unchanged since the spring 2011 survey. More than one in two Europeans also support "European economic and monetary union with one single currency, the euro", despite a slight fall in support. On the other hand, support for "further enlargement of the EU to include other countries in future years" has fallen significantly and this idea is now supported by just over a third of Europeans.



A common defence and security policy among EU Member States

Almost three out of four Europeans (74%, -1 percentage point versus spring 2011) are in favour of "a common defence and security policy among EU Member States", whereas 18% (+1 percentage point) are against the idea and 8% (unchanged) did not express an opinion.

A majority of respondents in all Member State continue to support "a common defence and security policy among EU Member states". It is supported by an absolute majority of the people polled in 26 of the 27 EU countries, and by a relative majority in Ireland (45% versus 31%). Support for this idea has gained the most ground in Sweden (+5 percentage points), Slovenia (+5), Estonia (+4) and Lithuania (+4), while Finland (-7 points) and Portugal (-6) recorded the most significant falls.

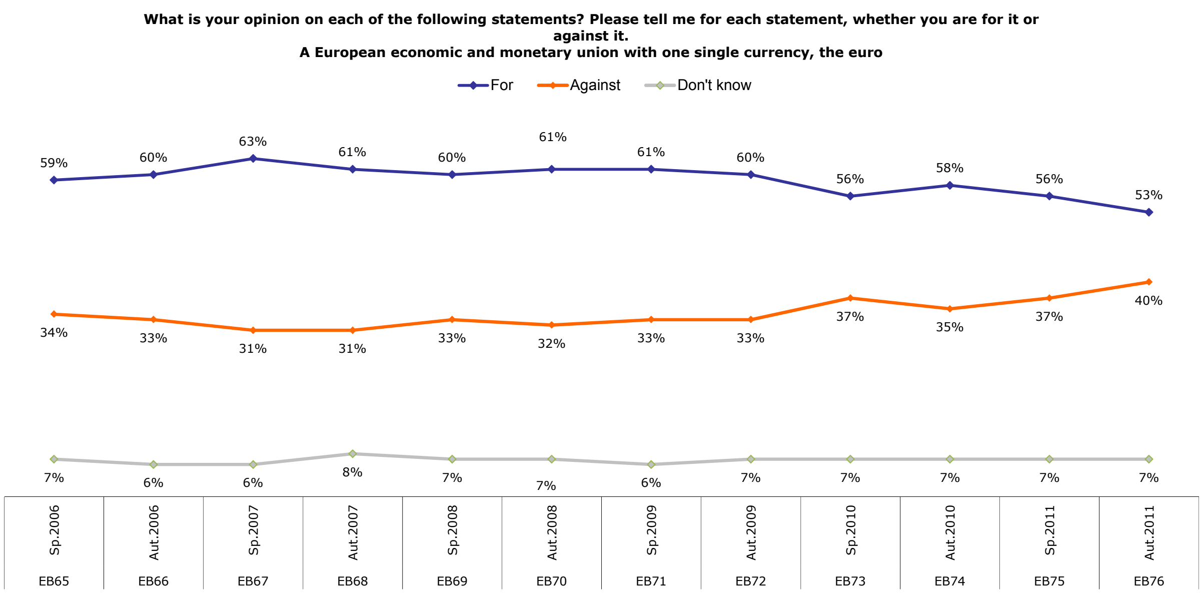
A common foreign policy of the 27 Member States of the EU

Almost two-thirds of Europeans (64%, unchanged) approve of the idea of "a common foreign policy of the 27 Member States of the EU", whereas 26% (unchanged) are against the idea and 10% (unchanged) did not express an opinion.

There is strong majority support for "a common foreign policy of the 27 Member States of the EU" in most of the EU countries, in particular in Slovakia (80%), Spain (78%), Greece (78%), Bulgaria (78%) and Lithuania (78%). There are however four noteworthy exceptions to this rule. Only a minority of respondents in the United Kingdom support this policy (39%, versus 46%) and opinions on this question are very divided in the Nordic countries: the for-against ratio is 50%-46% in Finland, 48%-47% in Denmark and 45%-52% in Sweden. Support for a common foreign policy has increased the most in Luxembourg (+8 percentage points), while Italy (-6) recorded the biggest fall.

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

Support for "European economic and monetary union with one single currency, the euro" has fallen slightly, but the idea is still supported by a clear majority of respondents: 53% of Europeans (-3 percentage points) are in favour of the idea, while 40% (+3) are against it and 7% (unchanged) did not express an opinion. Although a majority of respondents still support economic and monetary union, this support is trending downwards: the fall of three percentage points recorded in this survey follows a fall of two percentage points in the previous survey (between spring 2011 and autumn 2010).



64% of the people polled in the eurozone countries support "European economic and monetary union with one single currency, the euro", compared with only 32% of non-eurozone respondents.

A detailed analysis of the national data shows that a majority of respondents in 20 Member States support economic and monetary union: Slovenia (81%), Belgium (80%), Luxembourg (80%), Slovakia (78%), Ireland (78%), Greece (75%), the Netherlands (71%), Finland (71%), Germany (66%), Estonia (64%), France (63%), Spain (63%), Romania (61%) – the most positive non-eurozone country -, Malta (61%), Austria (58%), Italy (57%), Cyprus (55%), Portugal (54%), Hungary (54%) and Bulgaria (50%). It is interesting to note that there is still strong support for economic and monetary union and the euro even in the countries where trust in the European Union has declined, such as Greece, Ireland, France, Germany, Spain and Portugal for example.

Opinions are greatly divided in Lithuania (46% versus 45%). In Latvia, whereas in spring 2011 a majority of respondents supported this idea (53% versus 40%), supporters of this policy are now in a minority (42% versus 51%). Finally, respondents in the United Kingdom (80%), Sweden (74%), the Czech Republic (73%), Denmark (69%) and Poland (56%) continue to reject the idea of economic and monetary union and the euro. It is noteworthy that the attitude to economic and monetary union and the euro is one of the rare indicators where opinions in the Nordic countries, often very similar, differ significantly: the people polled in Finland – a member of the eurozone – are staunch supporters of this policy, whereas respondents in Sweden and Denmark are very hostile to the idea.

There have been significant changes (both negative and positive) in the support for economic and monetary union and the euro. Support has increased in Portugal (+5 percentage points) and has surged spectacularly in Greece (+15 percentage points). Conversely, it has fallen significantly in Denmark (-12 percentage points), Sweden (-11), Latvia (-11), and Italy (-10).

In the candidate countries, a strong majority of respondents still support economic and monetary union and the euro in Montenegro (78%, -1 percentage point), the Former Yugoslav Republic of Macedonia (74%, -1) and Croatia (63%, -1), without any significant changes since spring 2011. On the other hand, support for this policy has collapsed by 16 percentage points to 41% in Iceland. As a result, the majority of respondents in Iceland are now against the idea (53%, +17 percentage points). Support has also fallen by six percentage points to 26% in Turkey, where 39% (+4) of respondents are now against the idea, whilst the "DK" rate remains high at 35% (+2).

A socio-demographic analysis reveals certain differences in levels of support for economic and monetary union and the euro:

- Men (56%) are more likely than women (49%) to support the idea.
- Young people are more likely to support this policy (57% of those aged 15 to 24) and support decreases gradually with age: 54% of those aged 25 to 39, 52% of those aged 40 to 54 and 51% of those aged 55 or over.
- The respondent's level of education creates several far more clear-cut differences: a large majority of people who studied up to the age of 20 or beyond (61%) and students (60%) are in favour of economic and monetary union, while this support is far weaker among those who left school before the age of 16 (44%).
- Managers (60%), employees (58%) and self-employed people (56%) are more likely than unemployed people (48%), pensioners (49%), manual workers and house persons (50%) to support the euro.
- Finally, support for the euro is stronger among the respondents who trust the European Union (72%, versus 42% of those who do not trust it) and those who consider that the EU's image is positive (73%, versus 31% of those for whom its image is negative).

QA16.1 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
EU27	53%	40%	7%
Gender			
Male	56%	38%	6%
Female	49%	42%	9%
Age			
15-24	57%	36%	7%
25-39	54%	39%	7%
40-54	52%	42%	6%
55 +	51%	40%	9%
Education (End of)			
15-	44%	44%	12%
16-19	51%	43%	6%
20+	61%	34%	5%
Still studying	60%	33%	7%
Respondent occupation scale			
Self- employed	56%	37%	7%
Managers	60%	36%	4%
Other white collars	58%	36%	6%
Manual workers	50%	44%	6%
House persons	50%	39%	11%
Unemployed	48%	45%	7%
Retired	49%	42%	9%
Students	60%	33%	7%
Trust in EU			
Tend to trust	72%	24%	4%
Tend not to trust	42%	51%	7%
Image of EU			
Positive	73%	22%	5%
Neutral	53%	39%	8%
Negative	31%	62%	7%

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

Support for "further enlargement of the EU to include other countries in future years" has fallen, and now, for the first time, an absolute majority of respondents are against the idea. Just over a third of Europeans (36%, -6 percentage points) are in favour of further enlargement of the EU in the coming years, whereas 53% (+6 percentage points) are against the idea and 11% (unchanged) did not express an opinion[43]. On the question of further enlargement, there is a significant division between, on the one hand, the NMS12 countries (58% for, 29% against) and the non-eurozone countries (47% for, 41% against), where a majority of respondents support the idea, and, on the other hand, the EU15 countries (30% for, 59% against) and the eurozone countries (30% for, 59% against), where a majority of respondents are against the idea.

Further enlargement is supported by an absolute majority of respondents in seven countries and by a relative majority in one country. The countries in question are Poland (69%), Lithuania (60%), Romania (58%), Hungary (56%), Bulgaria (54%), Malta (50%), Slovenia (50%) and Spain (45% for, 36% against). Opinions on further enlargement are split down the middle, or almost equally divided, in Slovakia (48% for, 47% against), Estonia (46% for, 45% against), Latvia (45% for, 45% against) and Cyprus (44% for, 45% against). Everywhere else, i.e. in 16 countries, a majority of respondents are against the idea; opposition is the strongest in Austria (77%), Germany (76%), France (71%), Finland (70%), the Netherlands (64%) and Belgium (63%).

Apart from Estonia (+2 percentage points) and Luxembourg (+5) where it has gained ground, and Poland, where it is unchanged, support for further enlargement has fallen in all European Union countries, notably in Sweden (-12 percentage points), Slovakia (-12), Hungary (-9), Portugal (-9), France (-9) and the Czech Republic (-9).

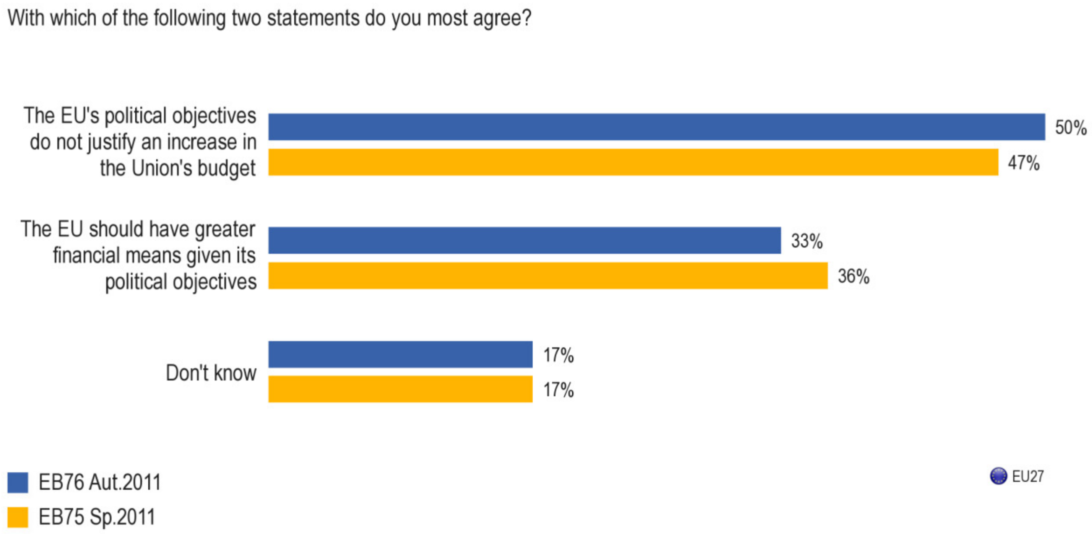
This groundswell of opinion therefore concerns not only countries where public opinion was already very critical of the idea of further enlargement, such as France for example, but also countries where there was broad support for the idea, such as Slovakia and Hungary. As a result, there has also been a shift of opinion in the Czech Republic and Portugal where respondents are now predominantly against further enlargement, whereas they tended to support the idea in EB75 of spring 2011.

In the candidate countries, a majority of respondents continue to support further enlargement, with more or less unchanged scores in the Former Yugoslav Republic of Macedonia (85%, +1 percentage point), Montenegro (72%, unchanged) and Croatia (64%, -2 percentage points). However, following a fall of eight percentage points, it is now the minority opinion in Iceland (39% versus 46%). In Turkey, the majority of the people polled did not express an opinion on this subject (39%, +6 percentage points), with the pro- and anti-enlargement camps being more or less equally divided (31% for, -1 percentage point, and 30% against, -5 percentage points).

[43] QA16. What is your opinion on each of the following statements? Please tell me for each statement, whether you are for it or against it.

3. THE EUROPEAN UNION'S BUDGET

- The feeling that an increase in the European Union's budget is unjustified has gained ground –



One in two Europeans now agree with the statement that "the EU's political objectives do not justify an increase in the Union's budget", i.e. an increase of three percentage points since the previous survey in spring 2011, whereas a third of them (33%, -3 percentage points) support the opposite idea that "the EU should have greater financial means given its political objectives". 17% (unchanged) did not express an opinion[44].

A relative majority (46% versus 37%) of the people polled in the NMS12 countries are in favour of increasing the European Union's budget, whereas an absolute majority of the people polled in the EU15 counties are against the idea (54% versus 30%).

The idea of increasing the EU's budget is supported by an absolute or relative majority of respondents in nine EU countries: Greece (61% versus 30%), Cyprus (57% versus 22%), Poland (53% versus 32%), Hungary (52% versus 34%), Romania (51% versus 23%), Portugal (44% versus 33%), Bulgaria (42% versus 28%), Ireland (41% versus 28%) and Malta (40% versus 17%, with a high "DK" rate of 43%).

Opposition to an increase in the EU's financial resources is predominant in all the other countries and is the most emphatic in Denmark (77%), Sweden (70%), Slovenia (67%), Latvia (67%), the United Kingdom (66%), the Czech Republic (64%), Finland (63%), Austria (63%), Slovakia (60%), the Netherlands (60%) and Germany (60%).

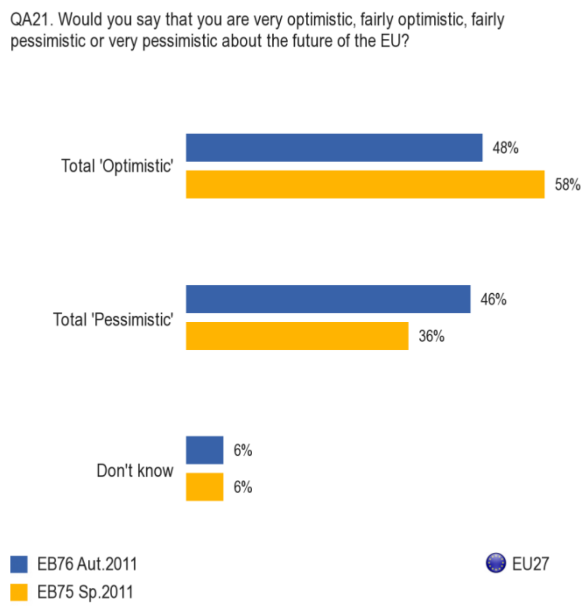
[44] QA17. With which of the following two statements do you most agree?

A socio-demographic analysis of the results reveals that opinions about the level of the European Union's budget vary considerably according to the respondent's age, views on the situation of the European Union and trust in it.

Thus, a relative majority of those aged 15 to 24 (43% versus 40%), those who consider that "overall things are going in the right direction in the EU" (49% versus 40%) and those who tend to trust the EU (48% versus 40%) are in favour of the EU's budget being increased, whereas an absolute majority of those aged 55 or over (51% versus 29%), those who consider that "overall things are going in the wrong direction in the EU" (57% versus 29%) and those who distrust the EU (59% versus 26%) consider that the EU's political objectives do not justify an increase in its financial resources.

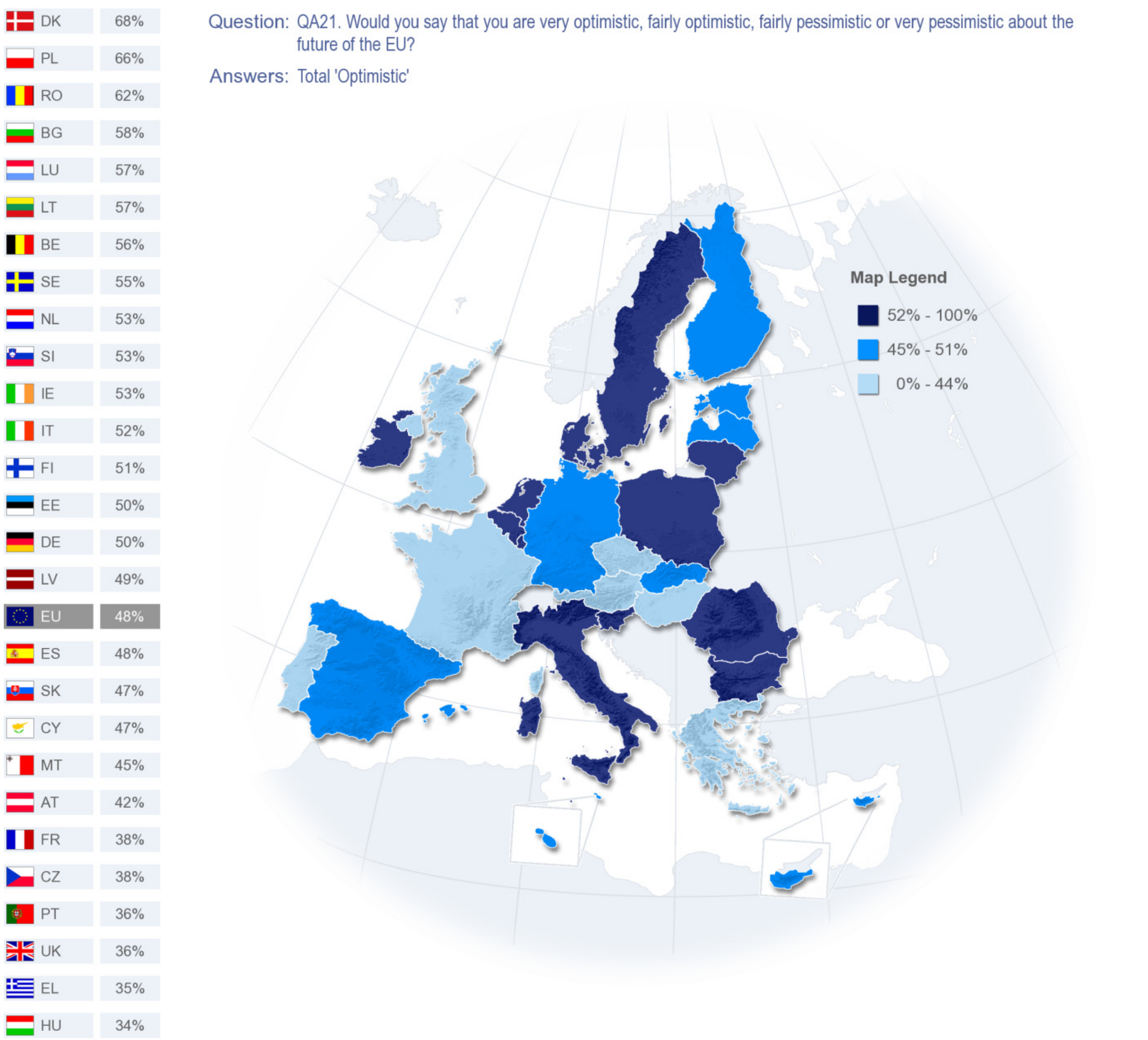
4. THE FUTURE OF THE EUROPEAN UNION

48% of Europeans are now optimistic about the future of the EU, compared with 46% who are pessimistic. The number of optimists has fallen by ten percentage points since the Standard Eurobarometer of spring 2011, while the number of pessimist has increased by ten percentage points and the "DK" rate remains unchanged at 6%[45].



A majority of respondents are optimistic in 18 countries, with a very large majority in Denmark (68% versus 28%), Poland (66% versus 27%), Romania (62% versus 30%), Bulgaria (58% versus 32%), Luxembourg (57% versus 42%), Lithuania (57% versus 36%), Belgium (56% versus 42%), Sweden (55% versus 44%), Ireland (53% versus 37%), the Netherlands (53% versus 44%), Slovenia (53% versus 45%), Italy (52% versus 39%) and Malta (45% versus 35%), and with a narrower majority in Finland (51% versus 46%), Estonia (50% versus 46%), Germany (50% versus 44%) and Spain (48% versus 42%).

45 QA21. Would you say that you are very optimistic, fairly optimistic, fairly pessimistic or very pessimistic about the future of the EU?



Optimism outweighs pessimism in the NMS12 countries (56% versus 37%) and, albeit to a lesser extent, in the non-eurozone countries (49% versus 44%). On the other hand, optimists and pessimists are equally divided in the EU15 countries (46% versus 47%) and the eurozone countries (47% versus 47%).

All countries in the European Union, without exception, have recorded an increase in pessimism and a decrease in optimism about the future of the EU. Levels of optimism have fallen the least in Slovenia (-3 percentage points), Latvia (-4), Poland (-4) and Bulgaria (-5). All the other countries have recorded significant falls: -19 percentage points in Slovakia, -17 in Estonia, -16 in Hungary, -15 in Ireland and the Czech Republic, -14 in Belgium, -12 in Cyprus, -11 in Sweden, Italy, Spain, Austria, the Netherlands and Portugal, -10 in Romania, France and Malta, -9 in the United Kingdom, Luxembourg, -8 in Finland, -7 in Denmark and Lithuania and -6 in Germany and Greece.

As a result of these changes, the Czech Republic (60% of pessimism, versus 38%), Hungary (59% versus 34%), France (58% versus 38%), Austria (54% versus 42%) and Slovakia (51% versus 47%) now have a pessimistic majority and have joined Greece (63% versus 35%), Portugal (57% versus 36%) and the United Kingdom (56% versus 36%), where pessimism was already predominant in spring 2011.

Pessimism is therefore predominant in eight EU Member States. Opinions are greatly divided in Cyprus (47% of optimism, versus 46%) and Latvia (49% versus 48%).

The degree of optimism about the future of the European Union is closely correlated with socio-demographic variables. The young generations, managers, financially advantaged persons and those who place themselves at the top of the social scale are more likely to be optimistic about the future of the EU, whereas a majority of those aged 55 or over, manual workers, pensioners, people with financial difficulties and those at the bottom of the social scale are more pessimistic.

Levels of optimism about the European Union's future also depend on how respondents perceive the situation of their country's economy: a majority of the people polled who are positive about their country's economy are optimistic about the future of the EU, whereas those who are negative about their country's economic situation tend to be pessimistic. The following categories are also far more likely to be optimistic about the future of the EU: those who consider that "globalisation is an opportunity", those who support economic and monetary union and those who consider that they understand how the European Union works (with approximately 61% of optimists in each category).

Although social divisions persist, it should be noted that the increase in pessimism extends to all social categories, including the most optimistic and the most pessimistic alike in spring 2011. Thus, optimism has fallen by 11 percentage points among those aged 15 to 24 and those who place themselves at the top of the social scale, and by 10 percentage points among those who almost never have difficulties paying their bills and among the most educated respondents; it has also fallen by nine percentage points among those who often struggle to pay their bills, by eight percentage points among the least educated respondents and people aged 55 or over, and by six percentage points among those who place themselves at the bottom of the social scale.

QA21 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
EU27	48%	46%	6%
Gender			
Male	51%	44%	5%
Female	46%	46%	8%
Age			
15-24	57%	36%	7%
25-39	51%	43%	6%
40-54	46%	49%	5%
55 +	44%	49%	7%
Education (End of)			
15-	38%	52%	10%
16-19	45%	49%	6%
20+	56%	40%	4%
Still studying	61%	33%	6%
Respondent occupation scale			
Self- employed	48%	47%	5%
Managers	56%	40%	4%
Other white collars	53%	42%	5%
Manual workers	46%	48%	6%
House persons	44%	43%	13%
Unemployed	41%	51%	8%
Retired	43%	50%	7%
Students	61%	33%	6%
Difficulties paying bills			
Most of the time	33%	60%	7%
From time to time	46%	47%	7%
Almost never	52%	42%	6%
Self-positioning on the social scale			
Low (1-4)	39%	53%	8%
Medium (5-6)	48%	46%	6%
High (7-10)	57%	38%	5%
Globalisation is an opportunity			
Tend to agree	62%	35%	3%
Tend to disagree	35%	61%	4%
Situation of national economy			
Good	61%	34%	5%
Bad	43%	50%	7%
Understand how the EU works			
Tend to agree	61%	36%	3%
Tend to disagree	37%	54%	9%
Euro			
In favour	61%	34%	5%
Against	33%	61%	6%

EUROPE 2020

1. THE PERCEIVED IMPORTANCE OF THE EUROPEAN UNION'S EUROPE 2020 INITIATIVES

- Europeans continue to put social and environmental initiatives first -

In this survey, interviewees were first asked to assign a level of importance to the seven initiatives set out by the European Union for the Europe 2020 strategy[46]. In order to do so, they had to give a score between 1 and 10 to each initiative, where 1 meant that they considered it 'not at all important' and 10 'very important'. Then the percentages were aggregated into three response categories: 'important' for scores 7 to 10, 'quite important' for 5 and 6, and 'not important' for 1 to 4. The same question was asked in the spring 2011 Standard Eurobarometer (EB75) and the spring 2010 Standard Eurobarometer (EB73).

The main lesson lies in the great stability of assessments of these seven flagship initiatives. As in the preceding Eurobarometer, **six of the seven initiatives are considered important by an absolute majority of Europeans.** Social and environmental measures continue to top the list of initiatives regarded as the most important, ahead of education measures and actions which aim to support the competitiveness of the European economy and innovation. **In the responses on the importance of these initiatives, public opinion expresses, and indeed confirms, its expectation that the European Union will take strong action in order to emerge from the crisis.**

In more detail, over three-quarters of Europeans say that it is important to 'help the poor and socially excluded and to enable them to play an active part in society' (79%, no change), 'to modernise labour markets with a view to raising employment levels' (78%, -1 point) and 'to support an economy which uses fewer natural resources and gives out fewer greenhouse gases' (75%, -1 point).

Three initiatives attract the support of between 60% and 70% of respondents. These are 'enhance the quality and appeal of the EU's higher education system' (70%, no change), 'help the EU's industrial base so that it can become more competitive by promoting entrepreneurship and developing new skills' (69%, +1 point) and 'increase support for research and development policies and turn inventions into products' (60%, no change). Education measures, measures for encouraging European competitiveness and support for research therefore rank just below the social and environmental measures.

[46] QB1. For each of the following initiatives, please tell me how important or not you think they are in order for the EU to exit the present financial and economic crisis and prepare for the next decade. Please use a scale from 1 to 10, where '1' means that you think this initiative is "not at all important" and '10' means that it is "very important".

Since this indicator was first included in the spring 2010 Eurobarometer (EB73), the fight against exclusion, employment and sustainable development have constantly figured in the three Europe 2020 strategy initiatives which are perceived as the most important.

This is the third time that this question has been asked in the Eurobarometer: spring 2010 (EB73), spring 2011 (EB75), and now in autumn 2011 (EB76). If we analyse the evolutions for each of the initiatives since spring 2010, it is clear that the answers to this question have remained very stable from one survey to the next.

After a three-point rise in the importance given to **'help the poor and socially excluded and enable them to play an active part in society'** between spring 2010 (EB73), 76%, and spring 2011 (EB75), 79%, the scores remain unchanged in autumn 2011.

After a three-point rise in the proportion mentioning **'modernise labour markets, with a view to raising employment levels'** between spring 2010 (76%) and spring 2011 (79%), this initiative has seen a very slight decline in autumn 2011 (78%, -1).

'Support an economy that uses fewer natural resources and emits less greenhouse gas' also gained ground by three points between spring 2010 (73%) and spring 2011 (76%); this initiative has fallen back very slightly in autumn 2011 (-1, to 75%).

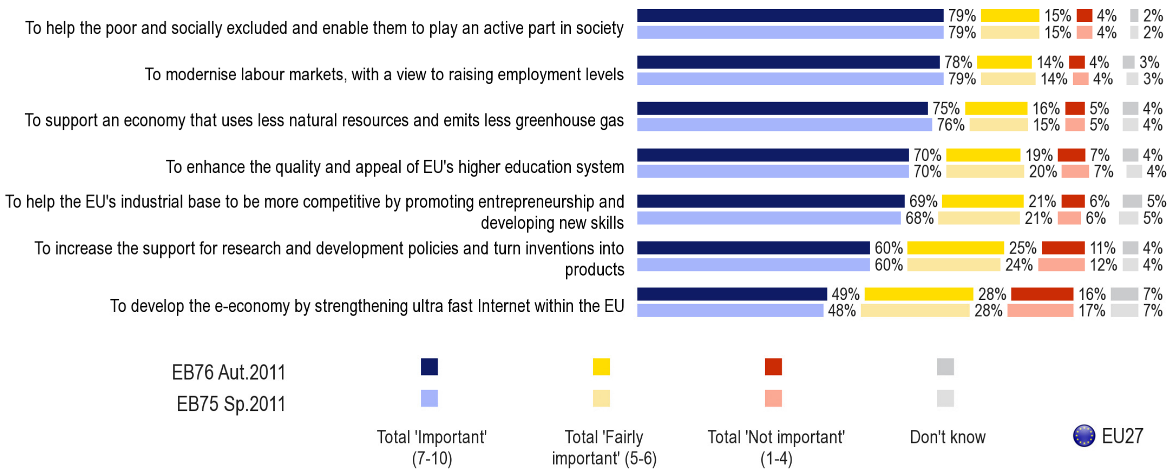
'Enhance the quality and appeal of EU's higher education system' is considered to be important by 70% of Europeans, the same as in spring 2011, when it recorded a three-point rise on spring 2010.

'Help the EU's industrial base to be more competitive by promoting entrepreneurship and developing new skills' has risen by one point to 69%, after remaining stable between spring 2010 and spring 2011.

The proportion of respondents in the European Union who believe that it is important to **'increase the support for research and development policies and turn inventions into products'** has remained stable since spring 2011 at 60%, after a very slight one-point rise between EB73 (spring 2010) and EB75 (spring 2011).

'Develop the e-economy by strengthening ultra-fast Internet within the EU' is an initiative whose perceived importance has grown since spring 2010 across Europe (46% in spring 2010; 48% in spring 2011, +2 points, and 49% in autumn 2011, +1 point). Nevertheless, it remains the only one of these initiatives which appears to be of relatively secondary importance to respondents. A little more than a quarter of interviewees say that this initiative is of average importance (28%, no change), and 16% (-1 point) that it is 'not important'.

QB1. For each of the following initiatives, please tell me how important or not you think they are in order for the EU to exit the present financial and economic crisis and prepare for the next decade. Please use a scale from 1 to 10, where '1' means that you think this initiative is "not at all important" and '10' means that it is "very important".



As in the spring 2011 Eurobarometer, an absolute majority of citizens in almost all Member States agree that the first six initiatives are important, with no significant evolutions. There are only two exceptions: in France (48%) and the United Kingdom (46%), only a relative majority of respondents attribute importance to **support for research and development policies.**

National opinions are more divided on **developing the e-economy.** There is a perceptible difference between the NMS12, where an absolute majority of respondents are convinced of the importance of the e-economy and broadband (58%) and the EU15, where this majority is only relative (47%). However, a detailed analysis by country shows that this measure is regarded as important by an absolute majority of interviewees in 15 of the 27 EU countries. These countries are Ireland (68%), Greece (65%), Slovakia (64%), Lithuania (64%), Slovenia (63%), Bulgaria (60%), Poland (59%), Romania (58%), Cyprus (57%), Malta (57%), Hungary (56%), Spain (56%), Italy (55%), Portugal (55%) and Latvia (54%).

QB1 For each of the following initiatives, please tell me how important or not you think they are in order for the EU to exit the present financial and economic crisis and prepare for the next decade.
Please use a scale from 1 to 10, where '1' means that you think this initiative is "not at all important" and '10' means that it is "very important".

	To help the poor and socially excluded and enable them to play an active part in society	To modernise labour markets, with a view to raising employment levels	To support an economy that uses less natural resources and emits less greenhouse gas	To enhance the quality and appeal of EU's higher education system	To help the EU's industrial base to be more competitive by promoting entrepreneurship and developing new skills	To increase the support for research and development policies and turn inventions into products	To develop the e-economy by strengthening ultra fast Internet within the EU
EU27	79%	78%	75%	70%	69%	60%	49%
BE	**83%**	81%	77%	72%	68%	61%	*45%*
BG	86%	**87%**	86%	76%	86%	69%	*60%*
CZ	76%	**88%**	75%	68%	76%	64%	*48%*
DK	71%	77%	**78%**	**78%**	72%	71%	*34%*
DE	85%	82%	**86%**	84%	64%	66%	*49%*
EE	75%	**76%**	70%	66%	71%	52%	*48%*
IE	**85%**	**85%**	75%	77%	80%	72%	*68%*
EL	**91%**	**91%**	84%	84%	83%	73%	*65%*
ES	**88%**	85%	79%	83%	73%	69%	*56%*
FR	**75%**	69%	73%	62%	66%	48%	*33%*
IT	71%	**72%**	69%	58%	69%	56%	*55%*
CY	91%	**92%**	83%	86%	87%	62%	*57%*
LV	85%	**90%**	73%	75%	83%	60%	*54%*
LT	**84%**	82%	81%	74%	79%	*64%*	*64%*
LU	**83%**	71%	74%	73%	74%	56%	*34%*
HU	83%	**85%**	82%	67%	79%	69%	*56%*
MT	**89%**	84%	83%	85%	71%	66%	*57%*
NL	**82%**	80%	78%	72%	73%	60%	*47%*
AT	73%	75%	**80%**	75%	61%	59%	*49%*
PL	76%	**77%**	69%	64%	65%	*56%*	59%
PT	84%	**85%**	75%	74%	73%	66%	*55%*
RO	81%	**83%**	75%	73%	73%	67%	*58%*
SI	91%	**94%**	84%	69%	88%	72%	*63%*
SK	84%	**93%**	82%	77%	82%	67%	*64%*
FI	**88%**	**88%**	81%	71%	83%	62%	*47%*
SE	88%	81%	**92%**	80%	77%	76%	*27%*
UK	**72%**	71%	64%	54%	59%	46%	*39%*

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

2. OPINION OF THE EUROPEAN UNION'S TARGETS FOR EUROPE 2020

- The Europe 2020 targets seem realistic to the majority of Europeans -

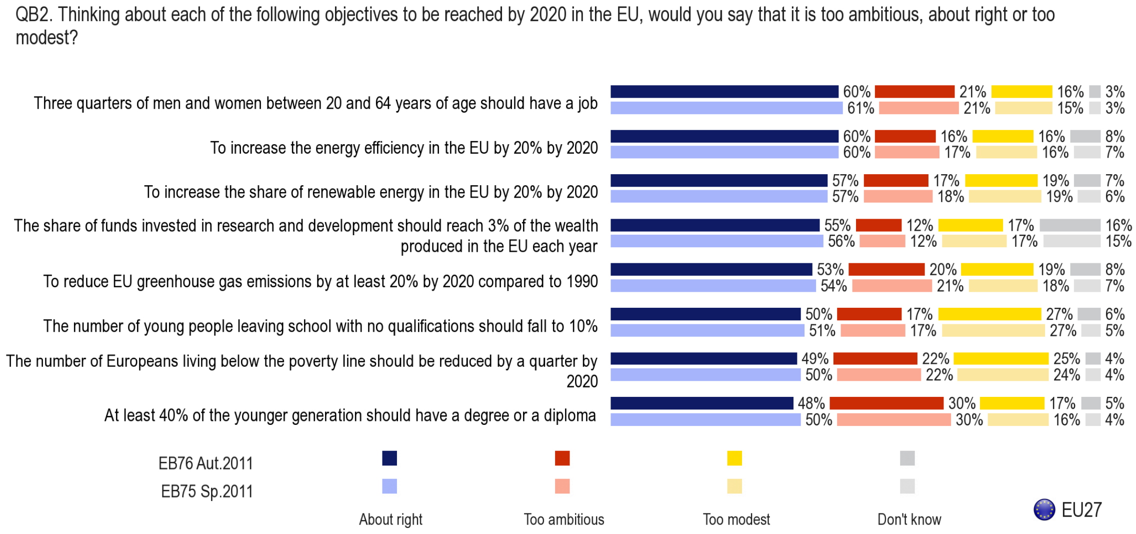
Having ranked the various initiatives by their importance, Europeans were asked to say how realistic the EU's Europe 2020 strategy targets were. There were three possible answers here: 'too ambitious', 'about right', or 'too modest'.

The targets tested were thought to be 'about right' by a large majority of respondents. Six of the eight targets were regarded as achievable by an absolute majority, with scores running from 50% for 'the number of young people leaving school with no qualifications should fall to 10%' to 60% for 'three quarters of men and women between 20 and 64 years of age should have a job', and 'increase the energy efficiency in the EU by 20% by 2020'. The other results in this range are as follows: 'increase the share of renewable energy in the EU by 20% by 2020', 57%; 'the share of funds invested in research and development should reach 3% of the wealth produced in the EU each year', 55%; and 'reduce EU greenhouse gas emissions by at least 20% by 2020 compared to 1990', 53%.

Two out of the eight targets attracted a large relative majority, approaching an absolute majority: 'the number of Europeans living below the poverty line should be reduced by a quarter by 2020 ' (49%) and 'at least 40% of the younger generation should have a degree or a diploma' (48%).

There has been a very slight decline since spring 2011, the perception that the targets are achievable falling by two points for one target and one point for five others. The remaining two are unchanged. Nevertheless, the main conclusion now as at the time of the previous survey is that a majority of Europeans regard all the Europe 2020 targets as 'about right', in other words as realistic and achievable [47].

[47] QB2. Thinking about each of the following objectives to be reached by 2020 in the EU, would you say that it is too ambitious, about right or too modest?



When we analyse the variations on this question since spring 2010, a general trend emerges. First, and for all the targets tested, perceived realism fell back between the spring 2010 survey (EB73) and the autumn 2010 survey (EB74); then it gained ground again, or remained stable – for two of the eight objectives 'increase the share of renewable energy in the EU by 20% by 2020', and 'The number of young people leaving school with no qualifications should fall to 10% ' – between autumn 2010 and spring 2011. Then - as we have already noted - it declined again for six of the eight targets. Ultimately, since spring 2010, the proportion of Europeans believing the Europe 2020 strategy targets to be 'about right' has fallen by three points or more for four of them, by one or two points for three of them, and has remained unchanged for just one.

Evolution of perceived relevance of the targets since the Standard EB 73, spring 2010

Statement: % « About right »	**EB73 (Spr. 2010)**	**EB74 (Aut. 2010)**	**Evol. Aut.2010-Spr.2010**	**EB75 (Spr. 2011)**	**Evol. Spr.2011-Aut.2010**	**EB76 (Aut. 2011)**	**Evol. Aut.2011-Spr.2011**	**Evol. Aut.2011-Spr.2010**
Three quarters of men and women between 20 and 64 years of age should have a job	**63%**	59%	-4	61%	+2	**60 %**	-1	-3
The share of funds invested in research and development should reach 3% of the wealth produced in the EU each year	**56%**	54%	-2	56%	+2	**55%**	-1	-1
To reduce EU greenhouse gas emissions by at least 20% by 2020 compared to 1990	**55%**	53%	-2	54%	+1	**53%**	-1	-2
To increase the share of renewable energy in the EU by 20% by 2020	**58%**	57%	-1	57%	=	**57%**	=	-1
To increase the energy efficiency in the EU by 20% by 2020	**60 %**	59%	-1	60%	+1	**60 %**	=	=
The number of young people leaving school with no qualifications should fall to 10%	**53%**	51%	-2	51%	=	**50 %**	-1	-3
At least 40% of the younger generation should have a degree or a diploma	**52%**	48%	-4	50%	+2	**48%**	-2	-4
The number of Europeans living below the poverty line should be reduced by a quarter by 2020	**53%**	48%	-5	50%	+2	**49%**	-1	-4

The targets ‘Three quarters of men and women between 20 and 64 years of age should have a job’ and ‘The share of funds invested in research and development should reach 3% of the wealth produced in the EU each year’ are regarded as achievable by a majority of respondents in every EU country (‘about right’ responses are 60% and 55% respectively). There are no notable national particularities, though in Cyprus opinion is somewhat divided on the target of ensuring employment for three-quarters of men and women between 20 and 64 years of age: 35% believe that this is realistic, while 33% say that the target is ‘too modest’.

The three environmental targets, seen as achievable by a majority of respondents in every Member State, are nevertheless regarded in Belgium, Sweden and Austria as 'too modest' by proportions which are significantly above the European average. The aim of 'increasing the share of renewable energy in the EU by 20% by 2020', for example, appears too modest to 32% of interviewees in Belgium and Austria and to 37% in Sweden, compared with a European average of 19%. Opinion in Sweden is even more emphatic in respect of the target of 'reducing EU greenhouse gas emissions by at least 20% by 2020', this being the only country in which views are so evenly divided between those who think it is realistic and those who say it is too modest (44% against 40%). Finally, 29% of respondents in Austria, and 28% in Belgium and Sweden, believe that the aim of 'increasing energy efficiency in the EU by 20% by 2020' is too modest, compared with 16% in the European Union as a whole.

Opinion in Sweden and Belgium also stands out from the European trend when assessing the target of 'reducing the number of young people leaving school with no qualifications to 10%' . These are the only countries in which respondents are more likely to think this objective too modest than realistic, emphatically in Sweden (53% against 36%), and by a very narrow margin in Belgium (39% against 38%). Opinion in France is also atypical, being characterised by higher than average rates of responses assessing the target both as too modest (34%) and too ambitious (25%). 36% describe it as 'about right'.

'At least 40% of the younger generation should have a degree or a diploma' is regarded as too ambitious by a majority of respondents in five countries, Germany (55% against 33% who say it is 'about right'), Estonia (49% against 38%), the Czech Republic (47% against 44%), Hungary (44% against 43%) and Austria (43% against 42%). Conversely, it is regarded as too modest very generally in Sweden (69%), and by a relative majority in Denmark (47%) and Belgium (45%). It appears realistic to a majority in all the remaining Member States.

Finally, the target which aims to fight poverty was seen as 'too modest' by a narrow margin in three countries, Sweden (44% against 42% 'about right'), Belgium (38% against 37%) and Cyprus (34% against 30% 'about right', and 33% 'too ambitious'). 'Too ambitious' and 'about right' received first equal scores in Greece.

3. EUROPEAN UNION PRIORITIES FOR EACH INITIATIVE

- Youth employment, social welfare, training and the encouragement of renewable energies remain the actions prioritised by Europeans -

As in the previous Eurobarometer surveys, Europeans were then asked to consider the actions which should take priority in the seven flagship Europe 2020 initiatives: innovation, youth, the Internet, energy, industry, employment and skills, and combating poverty. In each of these areas three actions were put to the interviewees. They were first asked to say which priority they thought was the most important (Firstly?), with only one answer allowed; then the others (and then?), where several answers could be given. Totalling the responses to the two parts of the question gives an overall rating. In this report we analyse both these sets of results.

The results have remained generally stable since preceding Eurobarometer surveys. The two previous surveys (EB74 in autumn 2010 and EB75 in spring 2011) showed that the EU's proposed priorities for developing European innovation, helping young people into the employment market, strengthening access to the Internet for everyone, improving the efficiency of energy consumption, supporting European industry, improving employment and training opportunities for working people and combating poverty and social exclusion were very favourably received by Europeans. This reflected the strength of public demand for practical measures enabling Europe to emerge from the crisis. These conclusions continue to hold true in this new survey: of the 21 actions tested, 19 are regarded as priorities by an absolute majority of Europeans.

The order in which these 19 actions are ranked remains unchanged since the spring 2011 Eurobarometer. **The resonance of social concerns for Europeans, particularly in the area of employment but also, to a lesser extent, in relation to the environment, are still evident in this ranking.**

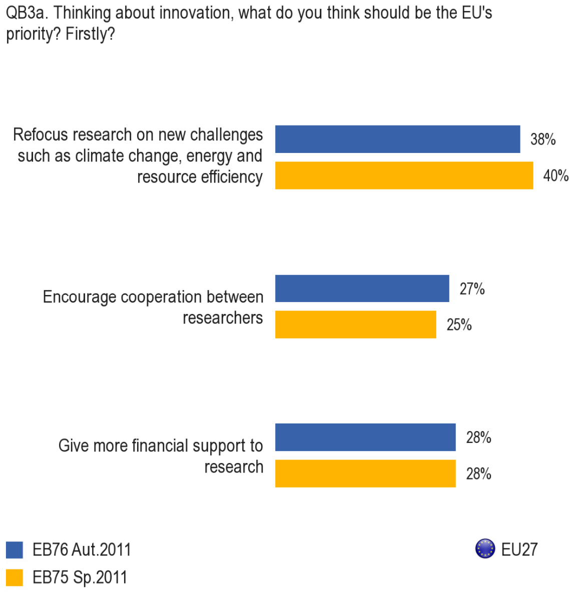
Of the 21 actions tested, six in particular are given overwhelming priority for implementation by the EU[48]. These are increasing youth employment (83%, unchanged since the preceding survey), improving the general quality of all levels of education (79%, -1 point), encouraging employment and training opportunities for working people (75%, -1 point), helping people adapt to new working conditions and potential career shifts (74%, -1), safeguarding social welfare systems and improving access to healthcare (74%, +1 point) and promoting renewable energy sources (73%, no change).

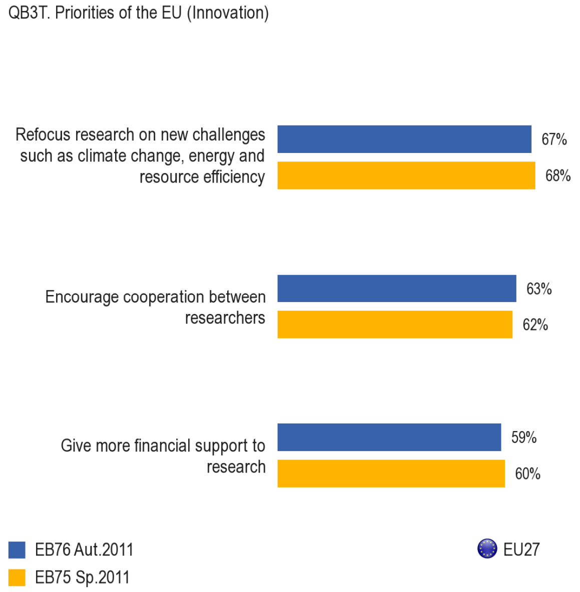
[48] QB3-B9. Thinking about innovation/young people/the Internet/energy/industry/jobs and skills/poverty, what do you think should be the EU's priority? Firstly? And then?

3.1 *Priorities for innovation*

With 38% of mentions (-2 points since EB75), Europeans make ‘refocusing research on new challenges such as climate change, energy efficiency and efficiency of resources’ the top EU priority for innovation. As a first choice, this action clearly outstrips ‘increasing finance for research’ (28%, no change) and ‘encouraging cooperation between researchers’ (27%, +2).

The ranking of the combined responses is closer, and encouraging cooperation between researchers stands in second place. But over and above the order in which they stand, it is clear that the three proposed actions are priorities for almost six out of ten Europeans or more.





If refocusing research on new challenges such as climate change, energy efficiency and efficiency of resources is the first priority in both sets of countries, encouraging cooperation between researchers is significantly more often mentioned in euro-zone countries (66%) than in countries outside the euro-zone (58%).

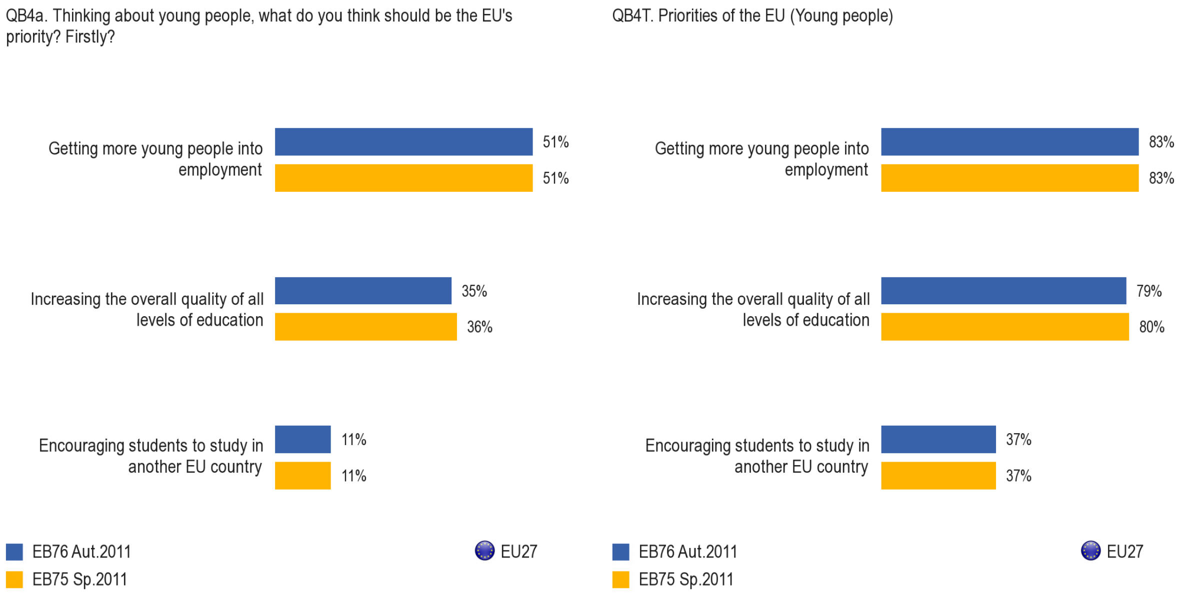
Always very alert to environmental concerns, respondents in the Nordic countries (63% in Sweden, 57% in Denmark and 55% in Finland) and in Germany (51%) are among the most likely to mention refocusing research on new environmental challenges as the *first priority* for innovation policy, with mentions exceeding 50%. This is also the case in Cyprus (61%) and Slovakia (53%).

Spain and Romania are the two countries where increasing financial support to research is the *first priority* (Spain 42%; Romania 32%). This is also the case in Latvia, where it is equal with refocusing research on the new environmental challenges (34%). Finally, Italy is the only country in which encouraging cooperation between researchers is the first priority for innovation policy (35%).

3.2 Priorities for youth

Judgements on youth policy remain very stable. Encouraging youth employment continues to be the number one youth policy priority for Europeans. With 51% *first responses* (no change), 'increasing the number of young people in employment' receives a higher score than 'improving the general quality of all levels of education' (35%,-1 point) and a much higher score than 'encouraging students to study in another EU Member State' (11%, no change). Of the 21 actions tested, **increasing the number of young people in employment is the only one to receive an absolute majority of first choice mentions** in no fewer than 12 Member States.

When responses are combined, the measures to encourage youth employment (83%, no change) and to improve the general quality of education (79%, -1) emerge as the two priority actions for implementation, ahead of encouraging student mobility (37%, no change). This last measure is one of only two of the 21 actions which do not command a majority in the combined ranking, evidence of its more secondary importance in public opinion.

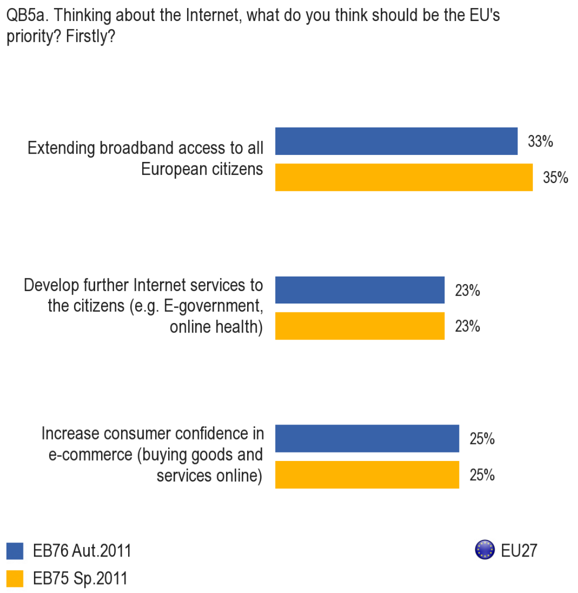


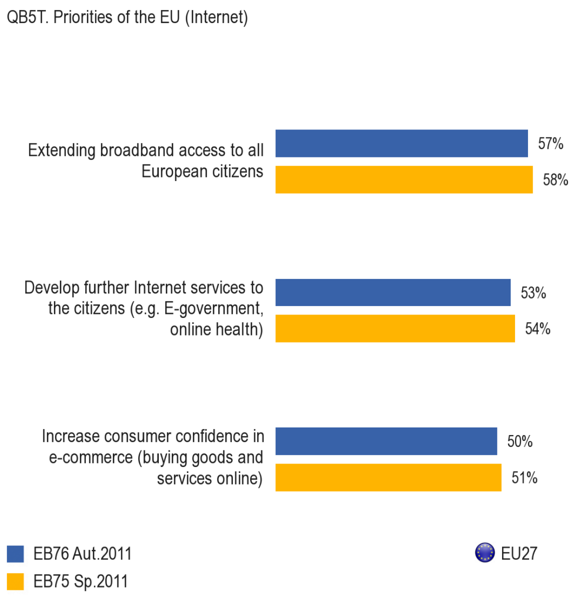
As was previously observed at the time of EB75 in spring 2011, respondents in the EU15 countries are more likely to mention 'improving the general quality of all levels of education' (80%, compared to 74% in the NMS12 countries), while those in NMS12 countries are significantly more likely to mention 'encouraging students to study in another Member State' (46%, compared to 34% in EU15). However, the ranking of the three priorities remains similar between both groups of countries.

Bulgaria, Latvia, Luxembourg and the Netherlands are the only Member States where respondents assign *first priority* to increasing the overall quality of all levels of education. This is also the case in Malta, but in equal first place with 'getting more young people into employment', the item which heads the list in every other country. This response attracts more than 50% of first responses in eleven EU countries, led by Finland (62%), Hungary (60%), Poland (59%) and the United Kingdom (57%).

3.3 Priorities for the Internet

High speed Internet access for all Europeans is the first priority identified by respondents for the EU's IT policy. With 33% of mentions (-2 points), it is cited as a *first response* ahead of 'strengthening consumer confidence in e-commerce' (25%, no change) and 'the development of Internet services for citizens' (23%, no change). The ranking thus remains unchanged since the Standard Eurobarometer 75 of spring 2011.
In the combined ranking, we observe that a majority of Europeans regard all three actions as priorities. Extending broadband Internet access remains at the top of the ranking, second place having previously been taken by the development of Internet services.





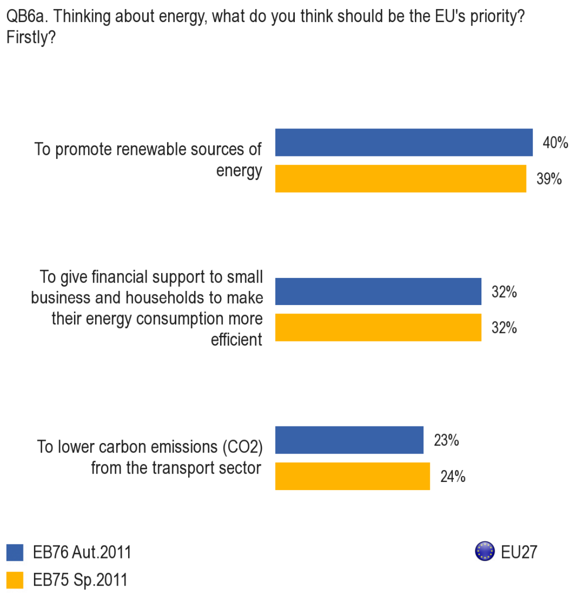
Respondents in the euro-zone countries are more likely than those outside the euro-zone to mention 'strengthening consumer confidence in e-commerce' as a priority for the EU (53% compared 44%) However, both groups of countries agree in putting 'extending broadband access' at the top of the ranking.

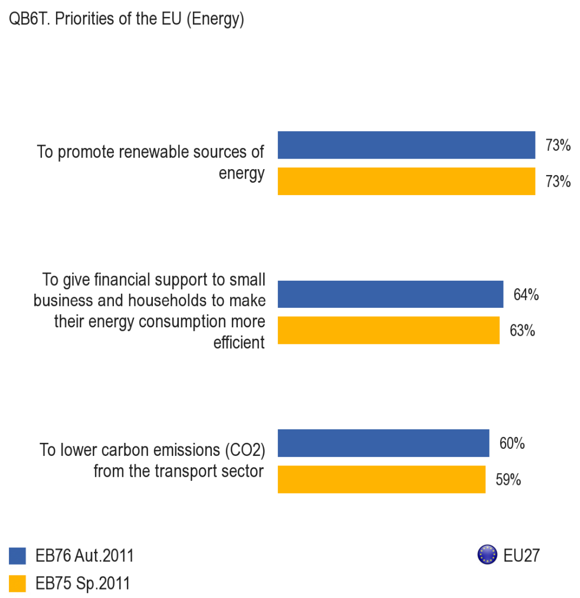
Extending broadband access leads the *first priorities* mentioned in 15 EU countries, with the highest levels in Poland (47%), Slovenia (44%), Hungary (43%) and Denmark (43%). This is also the case in Ireland and Latvia, but equal with developing Internet services to citizens.

The development of on-line services to citizens is mentioned as the first priority in Belgium, Estonia, Luxembourg, Bulgaria, Romania and Malta.
Increasing consumer confidence in e-commerce is the first priority in four countries, Germany, Italy, Portugal and Cyprus.

3.4 Priorities for energy

Opinions on the priorities for energy policy are also characterised by great stability. The promotion of renewable energy sources remains the first priority identified by respondents for the European Union's energy policy. It clearly leads the ranking both as the *first choice* (40%, +1) and when the responses are combined (73%, no change). With 32% (no change) and 64% (+1) of mentions, 'financial aid for small businesses and households to make their energy consumption more efficient' is in second place in both rankings. In third and final place is the reduction of CO_2 emissions in the transport sector, which is mentioned '*firstly*' by 23% of Europeans (-1) and by 60% in total (-1). The combined results for these three measures thus show that all are regarded as priority measures by an absolute majority of respondents.





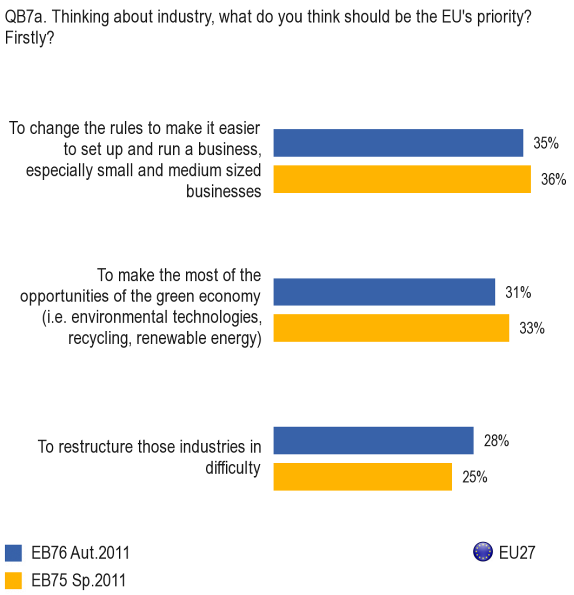
Respondents in EU15 countries tend to assign *first priority* to the promotion of renewable energy sources, ahead of 'financial support for small businesses and households to make their energy consumption more efficient' (42% against 31%) while the reverse applies in NMS12 countries, where 36% of respondents opt for support for households and small businesses, and 31% for the development of renewable energy sources.

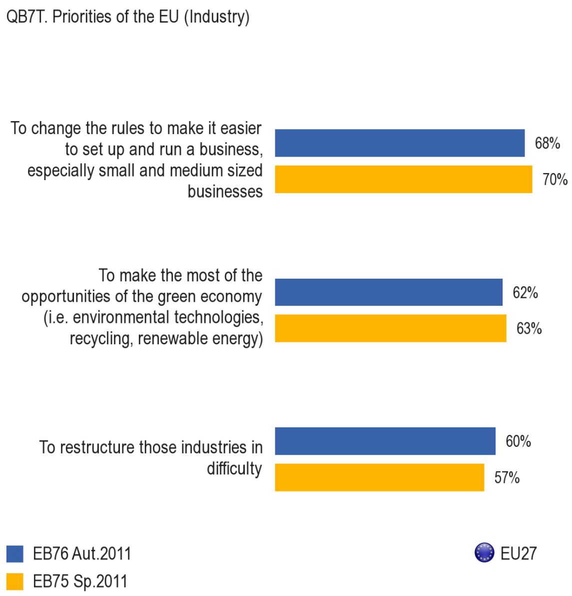
Promoting renewable energy sources is the *first priority* mentioned in 17 EU countries, with first priority scores exceeding 50% in the Netherlands (62%), Denmark (62%), Sweden (55%), Germany (55%) and Finland (54%). **Once again, the extreme sensitivity of opinion in these countries to all environmental issues is evident.**

Financial support for households and SMEs is the *first priority* for EU energy policy in nine countries: Latvia (49%), Ireland (47%), Malta (41%), the Czech Republic (40%), Slovakia (38%), Italy (36%), Poland (36%), Romania (35%) and Bulgaria (35%).
Finally, these two measures are cited equally as the *first priority* in Hungary, on 36%.

3.5 Priorities for industry

The encouragement of entrepreneurship by changing the regulations to make it easier to set up and run a business continues to be the top economic and industrial policy priority for Europeans, mentioned 'first' by 35% (-1 point) and by 68% in total (-2). 'Making the most of the opportunities of the green economy' came very close behind business creation, and was cited by 31% first (-2) and 62% in total (-1). 'Restructuring industries in difficulty' now attracts more support, with a three-point rise in both '*first*' (28%) and combined (60%) responses. This measure is drawing close to 'making the most of the opportunities of the green economy' in the ranking. The crisis has no doubt made the public more acutely aware of the challenges of industrial restructuring.





Entrepreneurship, seizing the opportunities offered by 'green growth', and industrial restructuring: these three actions remain 'total' priorities for an absolute majority of Europeans.

The order of economic and industrial priorities for the EU differs noticeably within and outside the euro-zone. In euro-zone countries, developing the green economy (35%) is chosen ahead of simplifying business creation (32%) and the restructuring of industries in difficulty (28%); in countries which do not belong to the euro-zone, simplifying business creation (40%) is the first priority, a long way ahead of industrial restructuring (27%) and maximising the opportunities of green growth (25%).

Making it easier to set up a business is the *first priority* in 11 countries, with the highest scores in Latvia (50%) and Ireland (48%).
Maximising the potential of the green economy stands in first place in nine countries, the highest levels being recorded in Denmark (49%), Sweden (47%) and Germany (46%).

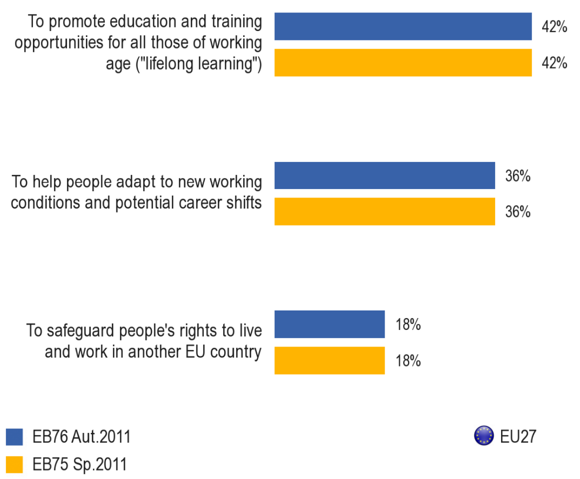
Restructuring industries in difficulty is now the *first priority* chosen in five countries: Portugal (40%), Greece (39%), Hungary (36%), Italy (35%) and Malta (33%). This was only the case in Malta and Portugal at the time of the Standard Eurobarometer 75 in spring 2011. Once again, the economic crisis is boosting expectations of a policy to aid industries in difficulty.

Finally, maximising the opportunities offered by the green economy and support for business creation are cited equally as the first priority in Belgium, at 35%. In France, it is industrial restructuring which stands in equal *first place* (32%) with the development of green growth.

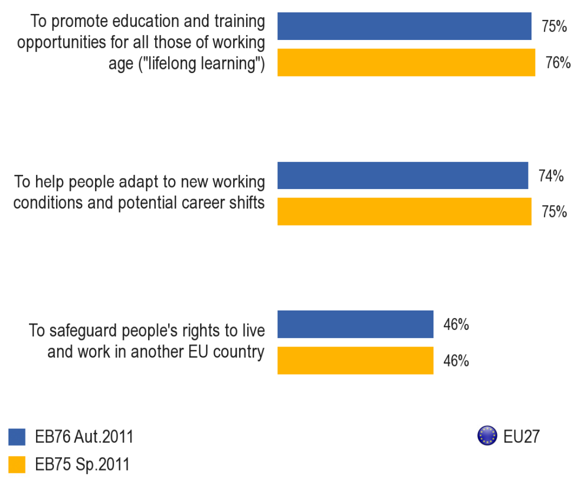
3.6 Priorities for employment and skills

Opinions regarding the priorities for employment and skills are unchanged. Encouraging opportunities for education and training for everyone of working age continues to head Europeans' priorities for the EU in this area, mentioned by 42% '*first*' (no change) and 75% in total (-1). It is just ahead of 'help for people to adapt to new working conditions and potential career changes' which is mentioned 'first' by 36% (no change) and by 74% in total (-1). These two priorities far outstrip 'safeguarding people's rights to live and work in another EU country', which is mentioned as a *first priority* by 18% (no change) and by 46% in total (no change). This action is one of the two which do not have the support of more than half of Europeans, perhaps because this right seems to be a matter of course today to a large majority of them.

QB8a. Thinking about jobs and skills, what should be the EU's priority? Firstly?



QB8T. Priorities of the EU (Jobs and skills)



The ranking of priorities in the EU15 countries differs significantly from the NMS12 results with regard to policies on employment and skills. 'Promoting education and training opportunities for all people of working age' ('lifelong learning') is mentioned as a *first response* in the EU15 countries (46%) but stands only in second place in the NMS12 (28%), some way behind 'helping adapt to new working conditions and possible career changes' (42%, against 34% in EU15 countries).

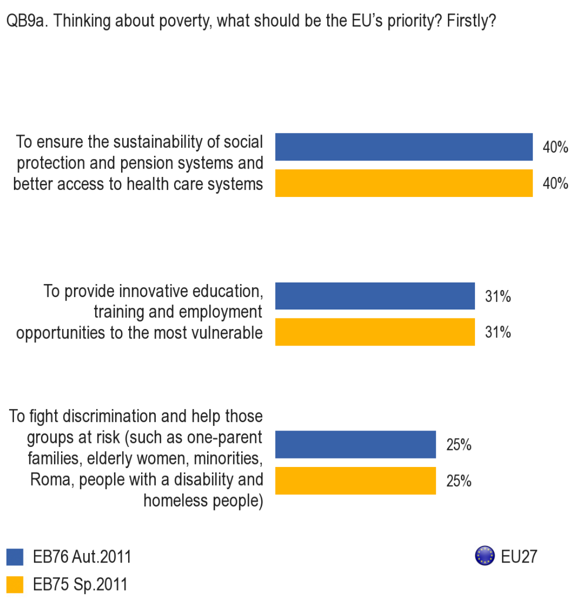
Promoting lifelong learning is the *first priority* for employment policy mentioned in 13 EU countries, with first priority scores exceeding 50% in Sweden (62%), Denmark (56%), the Netherlands (54%), the United Kingdom (53%) and Germany (51%).

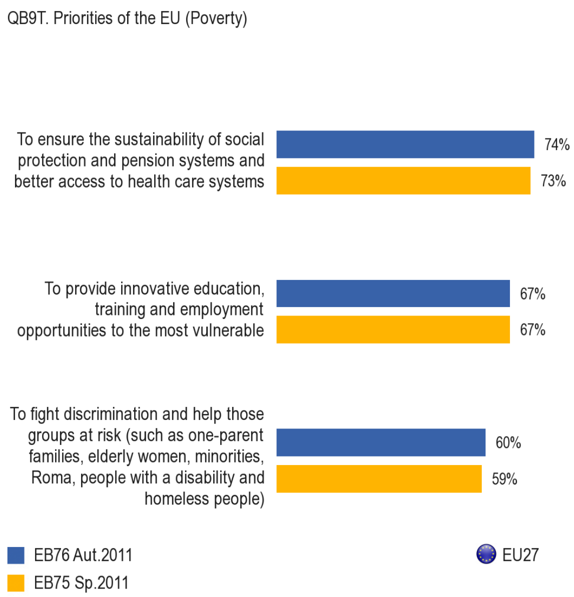
Introducing policies to 'help people adapt to new working conditions and career changes' is the *first priority* in the remaining 14 countries, with an absolute majority of mentions in Cyprus (54%) and Hungary (51%).

3.7 Priorities for combating poverty

The combined scores show that all three measures for tackling poverty are considered as priorities by an absolute majority of Europeans. Safeguarding social protection and improving access to healthcare leads the ranking of both *first responses* (40%, no change) and total responses (74%, +1). 'Offering the most vulnerable innovative opportunities for training, qualifications and employment' is in second place, with 31% of Europeans making this their *first priority* and 67% in total citing this item (both unchanged). The fight against discrimination stands in third place, mentioned *first* by 25% of respondents (no change) and by 60% in total (+1).

Though safeguarding social protection and improving access to healthcare is the *first priority* identified in this area in both groups of countries, the score is nevertheless significantly higher in NMS12 countries (46%) than in the EU15 (38%). Ensuring the sustainability of social protection and pension systems and improving access to healthcare is the top priority in 22 countries, and receives more than 50% *first* mentions in the Baltic States ((Latvia (54%), Estonia (53%) and Lithuania (52%)), Slovenia (51%), Slovakia (51%) and Sweden (51%).





A policy providing 'training and employment opportunities for the most vulnerable' is cited as the *first priority* for combating poverty in four countries, Luxembourg (46%), Ireland (44%), Malta (43%) and the United Kingdom (34%).

These two measures stand in equal *first place* in the Netherlands (38%).

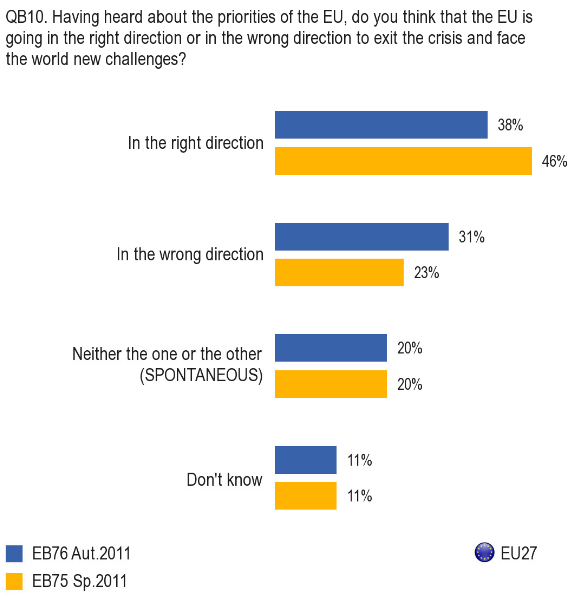
The fight against discrimination is not the first priority in any country, but it is mentioned by more than a third of respondents in Finland (34%).

While for all these questions there are variations between groups of countries, and even more striking differences between individual Member States, there are very few differences in terms of the socio-demographic profile of respondents. Beyond the national particularities analysed in the designation of the *first priority*, it should be remembered that the 19 measures which receive an absolute majority of mentions in total at the European level also do so, in almost every case, in each country. It may therefore be concluded, as in spring 2011, that there is a widespread and consensual demand in European public opinion for active policies to support education and employment for young people, to safeguard social protection and access to healthcare for all, and to support green growth and sustainable development.

4. THE DIRECTION TAKEN BY THE EUROPEAN UNION TO COMBAT THE CRISIS

- Opinions of the EU's policy for emerging from the crisis in the European Union are deteriorating -

Throughout this survey, opinions on the importance of the flagship initiatives, the realism of the targets and the priority nature of the Europe 2020 strategy measures have been all marked by great stability. However, opinions on the direction taken by the European Union in order to emerge from the crisis have deteriorated sharply.



Slightly fewer than four in ten Europeans (38%) think that the EU is going in the right direction to emerge from the crisis and face the new global challenges, an eight-point decline since spring 2011 Eurobarometer (EB75). 31% think the opposite - that the EU is going in the wrong direction, an increase of eight points. One-fifth (no change) *spontaneously* say that the EU is going in neither the right direction nor the wrong direction while 11% (no change) failed to answer the question. The stability of the 'neither right nor wrong' response and the D/K rate thus demonstrates that this six month period has seen public opinion slide towards a negative assessment of the EU's policies for emerging from the crisis.

Positive assessments are down nine points in the countries which have not adopted the single currency, eight points in the EU15 countries, seven points in the euro-zone and six points in the NMS12. This downward trend substantially narrows the ratio of positive to negative assessments in the EU15 countries (35% to 33%) and inside the euro-zone (35% to 32%). However, it has not so far prevented positive assessments from continuing to dominate in the NMS12 countries (51% to 23%) and in countries outside the euro-zone (46% to 29%).

With the sole exceptions of Latvia (+2 points), Sweden (+1) and Denmark (+1), the trend towards deteriorating assessments of the direction being taken by the EU is tangible in every Member State. It is particularly strong in this survey in the United Kingdom (-17 points), Romania (-14), Ireland (-14), Belgium (-12), Slovakia (-12), Spain (-12), Hungary (-9) and Italy (-8).

This trend therefore affects both the countries which were already noticeably more critical than the European average at the time of the previous survey in spring 2011, such as Spain and Italy, and those countries which were formerly characterised by an approval rate distinctly higher than the European average, like Romania, Belgium and Slovakia.

Under the impact of these evolutions, negative assessments now hold sway in five countries, Spain (46%, compared with 28% of 'right direction' answers), Greece (42% against 32%), the United Kingdom (42% against 32%), Italy (34% against 21%) and Portugal (33% against 30%). This was only the case in Greece at the time of the preceding Standard Eurobarometer 75 in spring 2011.

Approval of the direction taken is therefore dominant in 22 countries, with the highest levels in Sweden (67%), Lithuania (65%), Bulgaria (60%), Poland (57%) and Finland (57%). Positive assessments have a much narrower lead in France (37% against 35%). They exceed or equal 50% in 10 countries, whereas this was the case in 17 countries in spring 2011. In Romania, Belgium, Slovakia, Hungary, Luxembourg, the Czech Republic and the Netherlands, only a relative majority of respondents are now positive, rather than an absolute majority as was the case at the time of the Standard Eurobarometer 75 in spring 2011.

The socio-demographic analysis shows that the direction being taken by the European Union to emerge from the crisis is more likely to be supported by the young and by socially advantaged groups. Thus, 48% of 15-24 year olds approve of the direction being taken, compared to 35% of the 55+ age group. The direction taken by the Union is supported by 46% of those who continued their education beyond the age of 19, 48% of students, 48% of managers and 45% of those who position themselves towards the top of the social scale, but by only 28% of those who left school before the age of 16, 39% of manual workers, 34% of the unemployed, 31% of house persons and 33% of those who place themselves at the bottom of the social scale.

It also shows that the sharp downward trend in approval affects the entire European population, advantaged and disadvantaged categories alike. In other words, approval is declining both in the categories which traditionally support the European Union and in the traditionally more critical categories:

- since the Standard Eurobarometer 75 in spring 2011, approval of the EU's policies for emerging from the crisis (down by eight points among Europeans generally) has declined by six points among men, eight points in the 15-24 age group, seven points among people who studied beyond the age of 19, eleven points among students, and nine points among managers and the people positioning themselves at the top of the social scale.
- over the same period, approval has declined by ten points among women, six points in the 55+ age group, seven points among those who left school before the age of 16, nine points among the unemployed, eight points among house persons and six points among the people positioning themselves at the bottom of the social scale.

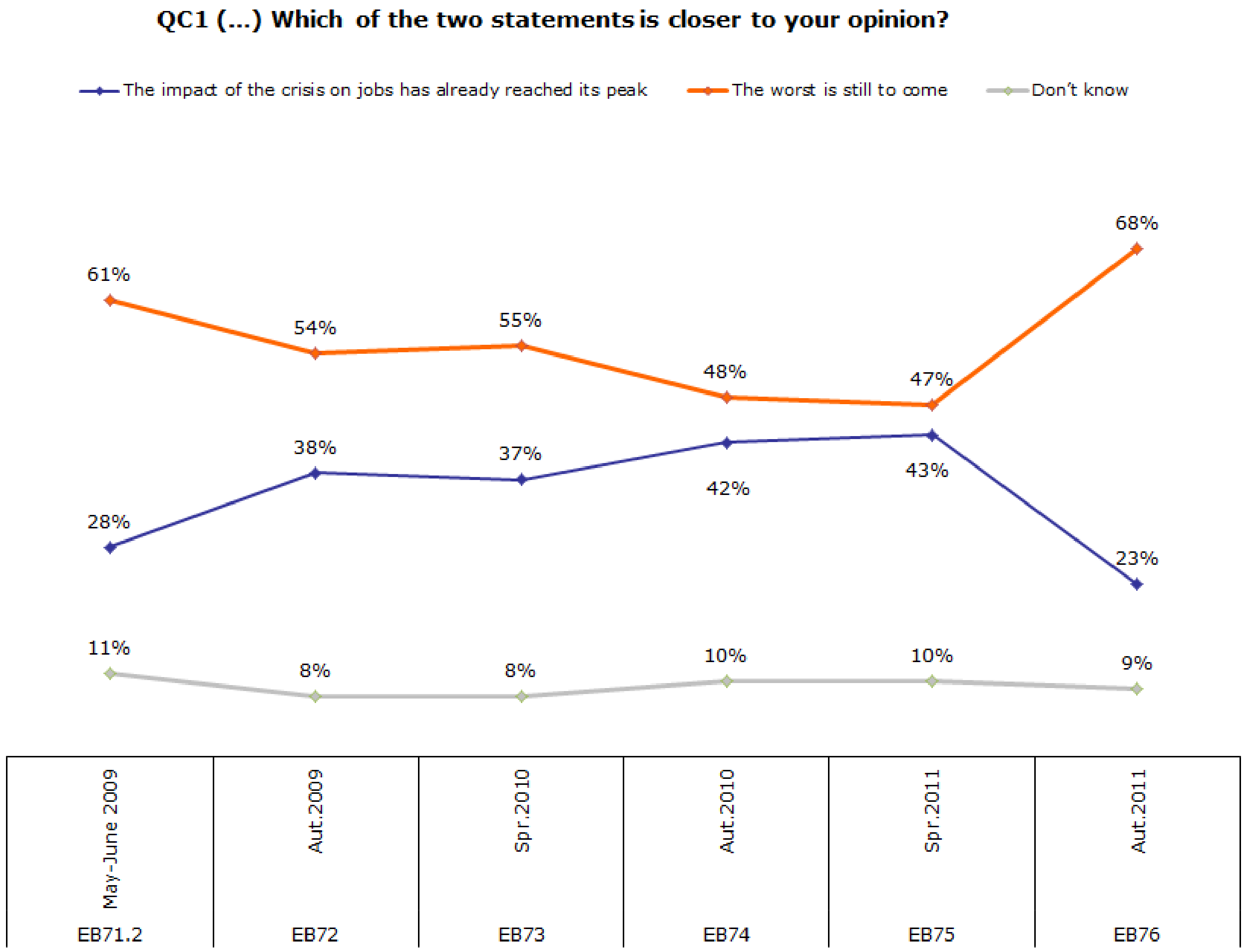
QB10 Having heard about the priorities of the EU, do you think that the EU is going in the right direction or in the wrong direction to exit the crisis and face the world new challenges?

	In the right direction	In the wrong direction	Neither the one or the other (SPONTANEOUS)	DK
EU27	38%	31%	20%	11%
Sex				
Male	42%	32%	18%	8%
Female	35%	30%	22%	13%
Age				
15-24	48%	27%	17%	8%
25-39	40%	31%	19%	10%
40-54	36%	33%	20%	11%
55 +	35%	31%	22%	12%
Education (End of)				
15-	28%	36%	22%	14%
16-19	37%	32%	21%	10%
20+	46%	26%	18%	10%
Still studying	48%	26%	17%	9%
Respondent occupation scale				
Self-employed	35%	33%	23%	9%
Managers	48%	25%	18%	9%
Other white collars	39%	30%	21%	10%
Manual workers	39%	33%	18%	10%
House persons	31%	31%	22%	16%
Unemployed	34%	38%	18%	10%
Retired	35%	31%	22%	12%
Students	48%	26%	17%	9%
Difficulties paying bills				
Most of the time	28%	39%	22%	11%
From time to time	33%	35%	21%	11%
Almost never	43%	28%	19%	10%
Self-positioning on the social staircase				
Low (1-4)	33%	36%	20%	11%
Medium (5-6)	38%	30%	21%	11%
High (7-10)	45%	29%	17%	9%

EUROPEANS, the EUROPEAN UNION AND THE CRISIS

1. HAS THE CRISIS PEAKED?

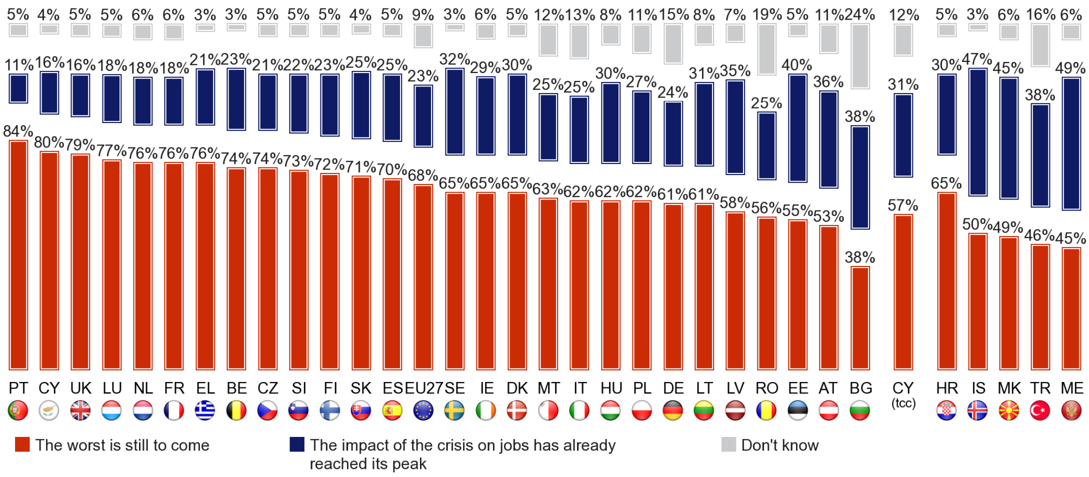
Although public opinion in the European Union had shown declining levels of pessimism since spring 2009, this sentiment saw a spectacular surge in autumn 2011 as regards the negative impact of the crisis on the job market (+21 points)[49]. **More than two-thirds of Europeans (68%) now consider that "the worst is still to come".** This score easily exceeds the level reached in May-June 2009 (61%). Fewer than a quarter of Europeans now express optimism (23%, -20 points).



[49] QC1 Some analysts say that the impact of the economic crisis on the job market has already reached its peak and things will recover little by little. Others, on the contrary, say that the worst is still to come. Which of the two statements is closer to your opinion?

A majority of respondents in almost all Member States consider that the "worst is still to come". Bulgaria is the only country where opinions are evenly divided (38% of the people polled are optimistic and 38% are pessimistic). In the candidate counties, optimism outweighs pessimism (49% versus 45%) in Montenegro.
The Member States in which respondents are the most emphatic in their views are Portugal (84% are pessimistic), Cyprus (80%), the United Kingdom (79%), Luxembourg (77%) and Greece, the Netherlands and France (76% are pessimistic in all three countries).

QC1. Some analysts say that the impact of the economic crisis on the job market has already reached its peak and things will recover little by little. Others, on the contrary, say that the worst is still to come. Which of the two statements is closer to your opinion?



Respondents are more likely to be pessimistic in the EU15 countries (70%) than in the NMS countries (61%). However, the results are more or less the same in the eurozone countries (68%) and the non-eurozone countries (67%).

Opinions have become more negative in almost all EU countries. Greece, where as many as 78% of respondents were pessimistic in spring 2011, is the only country where they are now slightly less pessimistic (76%, -2). The increase in pessimism is particularly striking in the Netherlands (76%, +37 points), Denmark (65%, +36), Slovakia (71%, +36) and Luxembourg (77%, +35). It is also higher than or equal to the increase in the European average for this answer (+21 points) in Belgium (74%, +33), the Czech Republic (74%, +31), Sweden (65%, +27), Estonia (55%, +25), Austria (53%, +24), Germany (61%, +23) and France (76%, +21).

QC1 Some analysts say that the impact of the economic crisis on the job market has already reached its peak and things will recover little by little. Others, on the contrary, say that the worst is still to come. Which of the two statements is closer to your opinion?

	The worst is still to come	Diff. Aut.2011-Spr.2011	The impact of the crisis on jobs has already reached its peak	Diff. Aut.2011-Spr.2011	Don't know	Diff. Aut.2011-Spr.2011
EU27	68%	+21	23%	-20	9%	-1
Euro Zone	68%	+21	23%	-20	9%	-1
Non-Euro Zone	67%	+19	24%	-18	9%	-1
NL	76%	+37	18%	-36	6%	-1
DK	65%	+36	30%	-38	5%	+2
SK	71%	+36	25%	-34	4%	-2
LU	77%	+35	18%	-32	5%	-3
BE	74%	+33	23%	-33	3%	=
CZ	74%	+31	21%	-31	5%	=
SE	65%	+27	32%	-24	3%	-3
EE	55%	+25	40%	-24	5%	-1
AT	53%	+24	36%	-26	11%	+2
DE	61%	+23	24%	-25	15%	+2
FR	76%	+21	18%	-17	6%	-4
IT	62%	+20	25%	-18	13%	-2
FI	72%	+20	23%	-22	5%	+2
PL	62%	+19	27%	-17	11%	-2
HU	62%	+18	30%	-19	8%	+1
UK	79%	+18	16%	-17	5%	-1
ES	70%	+17	25%	-15	5%	-2
CY	80%	+17	16%	-11	4%	-6
MT	63%	+17	25%	-13	12%	-4
SI	73%	+14	22%	-16	5%	+2
LT	61%	+13	31%	-14	8%	+1
RO	56%	+12	25%	-17	19%	+5
BG	38%	+10	38%	-12	24%	+2
LV	58%	+6	35%	-8	7%	+2
IE	65%	+5	29%	-2	6%	-3
PT	84%	+4	11%	-4	5%	=
EL	76%	-2	21%	+2	3%	=
CY (tcc)	57%	+10	31%	-8	12%	-2
HR	65%	+13	30%	-13	5%	=
TR	46%	+20	38%	-12	16%	-8
MK	49%	+4	45%	-2	6%	-2
IS	50%	+16	47%	-16	3%	=
ME	45%	+13	49%	-6	6%	-7

Analysis of the evolution since May-June 2009 indicates that pessimism has gained ground in the majority of European Union countries. However, levels of pessimism have fallen sharply in six EU countries, led by the Baltic States: Latvia (58%, -24 points), Estonia (55%, -21), Lithuania (61%, -13), Bulgaria (38%, -12), Germany (61%, -8) and Hungary (62%, -4).

QC1 Some analysts say that the impact of the economic crisis on the job market has already reached its peak and things will recover little by little. Others, on the contrary, say that the worst is still to come. Which of the two statements is closer to your opinion?

	The worst is still to come	Diff. Aut.2011 - May-June 2009	The impact of the crisis on jobs has already reached its peak	Diff. Aut.2011 - May-June 2009	Don't know	Diff. Aut.2011 - May-June 2009
EU27	68%	+7	23%	-5	9%	-2
Euro Zone	68%	+6	23%	-5	9%	-1
None-Euro Zone	67%	+8	24%	-5	9%	-3
PT	84%	+28	11%	-12	5%	-16
UK	79%	+16	16%	-15	5%	-1
NL	76%	+15	18%	-15	6%	=
ES	70%	+13	25%	-10	5%	-3
IT	62%	+13	25%	-10	13%	-3
SE	65%	+13	32%	-13	3%	=
PL	62%	+12	27%	-6	11%	-6
CZ	74%	+10	21%	-8	5%	-2
FR	76%	+9	18%	-7	6%	-2
MT	63%	+8	25%	-5	12%	-3
CY	80%	+7	16%	-3	4%	-4
DK	65%	+7	30%	-6	5%	-1
EL	76%	+7	21%	-7	3%	=
FI	72%	+7	23%	-9	5%	+2
BE	74%	+5	23%	-3	3%	-2
SI	73%	+5	22%	-4	5%	-1
SK	71%	+5	25%	+2	4%	-7
LU	77%	+4	18%	-2	5%	-2
AT	53%	+2	36%	+4	11%	-6
IE	65%	-1	29%	+8	6%	-7
RO	56%	-2	25%	+6	19%	-4
HU	62%	-4	30%	+5	8%	-1
DE	61%	-8	24%	+3	15%	+5
BG	38%	-12	38%	+22	24%	-10
LT	61%	-13	31%	+13	8%	=
EE	55%	-21	40%	+20	5%	+1
LV	58%	-24	35%	+22	7%	+2
CY (tcc)	57%	NA	31%	NA	12%	NA
TR	46%	+1	38%	-1	16%	=
HR	65%	-8	30%	+17	5%	-9
MK	49%	-15	45%	+20	6%	-5
IS	50%	NA	47%	NA	3%	NA
ME	45%	NA	49%	NA	6%	NA

A majority of respondents in all sections of the European population are now pessimistic about the impact of the crisis on employment. A majority of respondents in the "most advantaged" social categories consider that "the worst is still to come", as was already the case in May-June 2009, compared with spring 2011 when a majority were optimistic. Thus, 69% of the most educated respondents share this opinion, as do 67% of the people who almost never struggle to pay their bills.

There was also a shift from optimism to pessimism among young people between spring and autumn 2011, and the current trend now resembles that of May-June 2009. An absolute majority of young people are once again pessimistic (60%). Nevertheless, the oldest respondents are still more pessimistic than the youngest (71% of those aged 40-54 and 69% of those aged 55 or over).

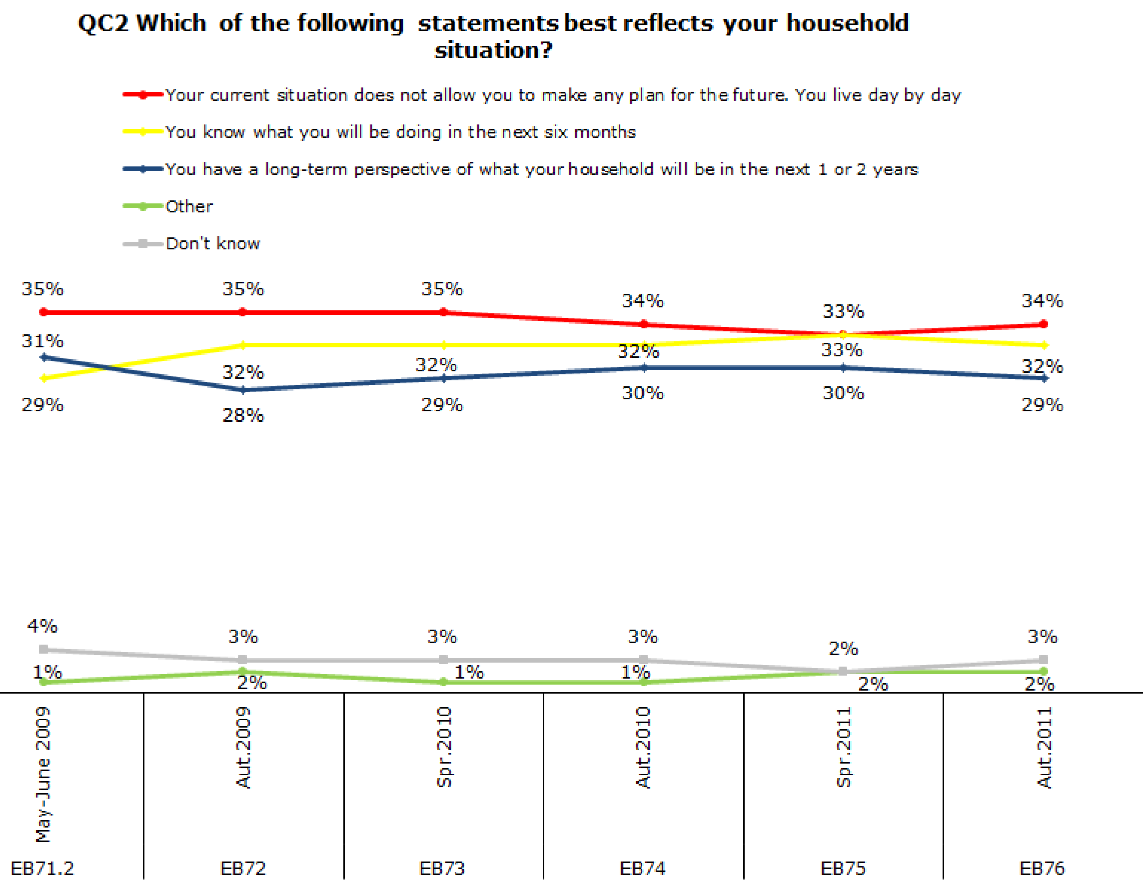
Finally, the Europeans who consider that globalisation represents an opportunity are less likely to be pessimistic (64%) than those who disagree (76%).

QC1 Some analysts say that the impact of the economic crisis on the job market has already reached its peak and things will recover little by little. Others, on the contrary, say that the worst is still to come. Which of the two statements is closer to your opinion?

	The worst is still to come	The impact of the crisis on jobs has already reached its peak	Don't know
EU27	68%	23%	9%
Age			
15-24	60%	28%	12%
25-39	67%	25%	8%
40-54	71%	21%	8%
55 +	69%	21%	10%
Education (End of)			
15-	70%	20%	10%
16-19	69%	22%	9%
20+	69%	23%	8%
Still studying	57%	32%	11%
Difficulties paying bills			
Most of the time	76%	17%	7%
From time to time	68%	23%	9%
Almost never	67%	24%	9%

2. THE IMPACT OF THE CRISIS ON THE SITUATION OF HOUSEHOLDS

While Europeans have become far more pessimistic in general about the impact of the crisis on jobs, opinions on the situation of households within the European Union seem, for the time being, to be relatively stable. In line with the results recorded in the Eurobarometer surveys since spring 2009, respondents are divided as regards the direct impact of the crisis on their situation[50]. The results for this question have remained stable, in particular since EB75 of spring 2011. Just over a third (34%, +1 point) of respondents still believe that their situation does not allow them to make any plans for the future. However, a similar proportion (32%, -1 point) say that they know what they will be doing in the next six months. Finally, the number of Europeans who have a longer-term vision of their household situation (in one or two years' time) has fallen by one point since spring 2011 and now stands at 29%.

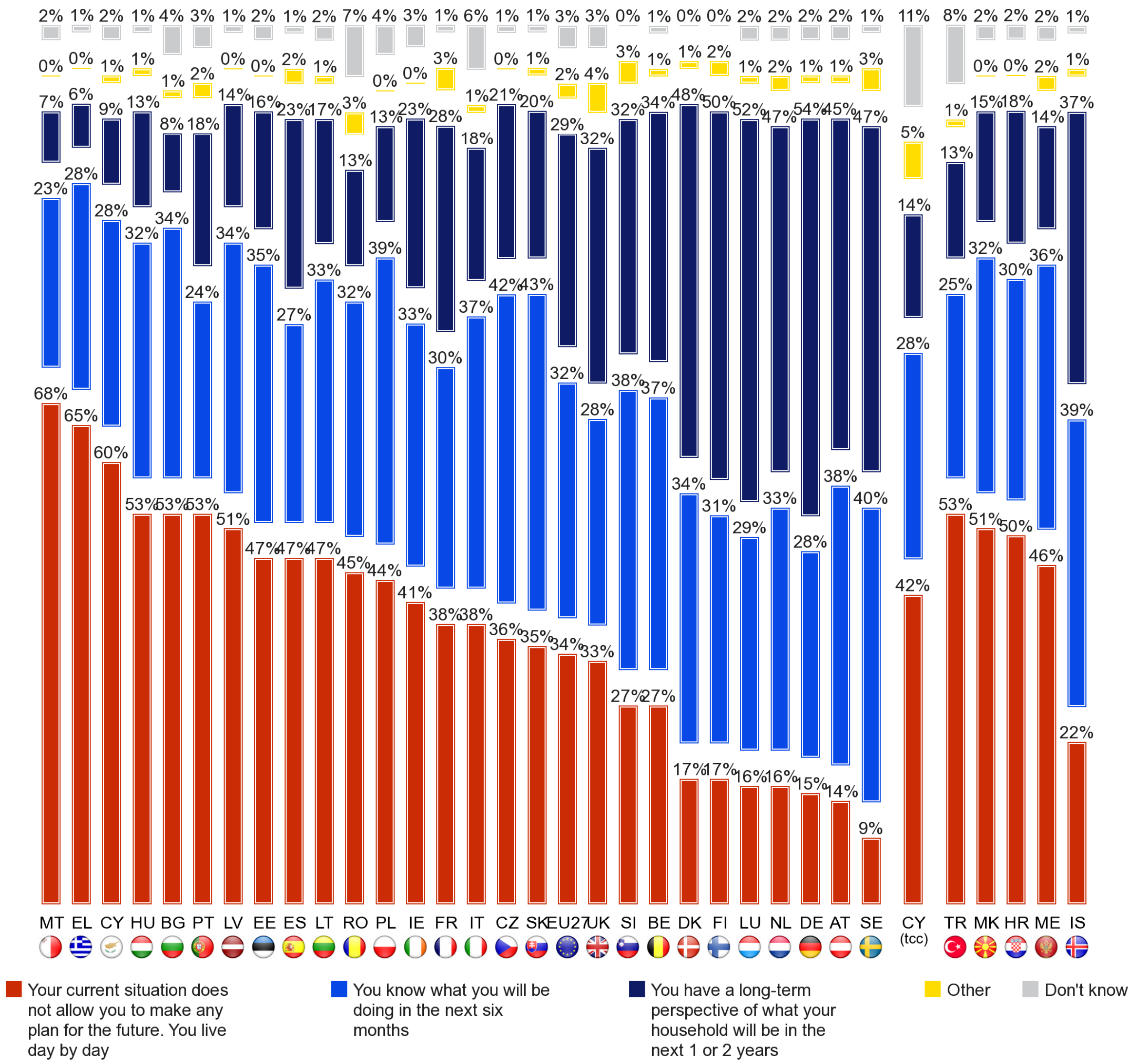


However, these European averages conceal significant differences between Member States. For example, the people polled in the NMS12 countries are more likely not to

50 QC2 Which of the following statements best reflects your household situation? Your current situation does not allow you to make any plans for the future. You live day by day; You know what you will be doing in the next six months; You have a long-term perspective of what your household will be in the next 1 or 2 years; Other; DK.

make plans for the future (44%, versus 32% in the EU15 countries) and are therefore far less likely (14%, versus 33% for the EU15 countries) to have a long-term vision of their household.

QC2. Which of the following statements best reflects your household situation?



An absolute majority of respondents in seven Member States consider that their current situation does not allow them to plan for the future. This is the case in Malta (68%), Greece (65%), Cyprus (60%), Bulgaria, Portugal and Hungary (53% each) and Latvia (51%). A relative majority also share this opinion in Estonia, Lithuania and Spain (47% each), Romania (45%), Poland (44%), Ireland (41%), France and Italy (38% each), the Czech Republic (36%) and Slovakia (35%). **The country with the largest increase in the number of respondents who live from day to day is Greece** (65%, +9 points). Greece also has the highest EU15 score for this answer.

Respondents in Slovakia (43%), the Czech Republic (42%), Sweden (40%), Poland (39%), Austria and Slovenia (38% each) and Italy and Belgium (37% each) are **the most likely to know what they will be doing in the next six months.** The countries where opinions have evolved the most favourably are Denmark (34%, +6 points) and Sweden (40%, +6 points).

As in the last four Eurobarometer surveys, respondents in northern European countries are more likely **to have a long-term vision of their household situation (one or two years)**, especially in Germany (54%), Luxembourg (52%), Finland (50%), Denmark (48%), the Netherlands and Sweden (both 47%) and Austria (45%). Respondents are now more upbeat in seven Member States, led by Luxembourg (52%, +6 points). In nine Member States, the results are more or less unchanged (+ or – 1 point).

In the candidate countries, a majority of respondents in Turkey (53%), the Former Yugoslav Republic of Macedonia (51%), Croatia (50%) and Montenegro (46%) find it impossible to plan for the future. However, in Iceland, 39% of respondents say that they know what they will be doing in the next six months, and 37% even have a long-term vision of their household; however this score has decreased by nine points since spring 2011.

Socio-demographic analysis

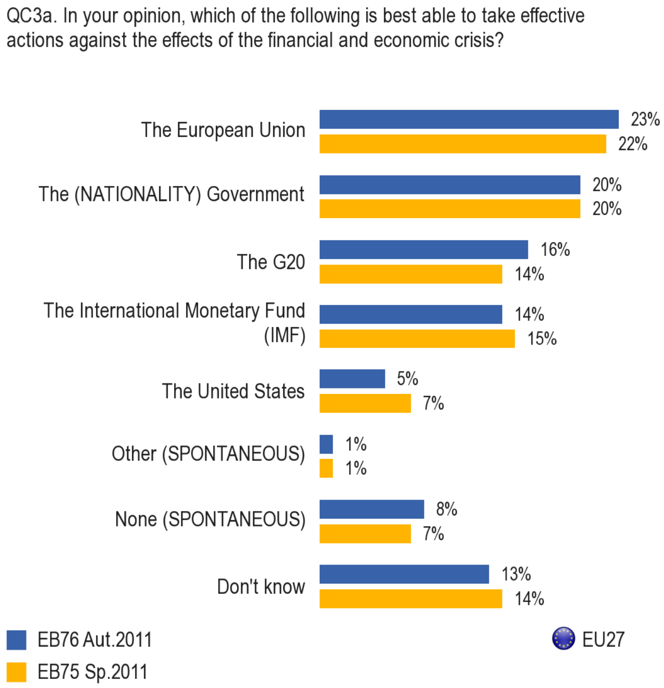
As we noted at the time of the previous survey in spring 2011, the least advantaged categories and people living on their own are the least likely to have a long-term perspective and, accordingly, are more likely to live one day at a time.

Thus, 46% of the least educated respondents live day by day (compared with 23% of the most educated), as do respondents who place themselves at the bottom of the social scale (58%, versus 19% of those at the top), widows (48%), people who are divorced or separated (47%) and single people (37%), compared with 31% of married people and 32% of single people living with a partner.

QC2 Which of the following statements best reflects your household situation?

	Your current situation does not allow you to make any plan for the future. You live day by day	You know what you will be doing in the next six months	You have a long-term perspective of what your household will be in the next 1 or 2 years	Other	Don't know
EU27	34%	32%	29%	2%	3%
Education (End of)					
15-	46%	26%	24%	1%	3%
16-19	38%	32%	25%	2%	3%
20+	23%	35%	40%	1%	1%
Still studying	24%	38%	31%	2%	5%
Self-positioning on the social scale					
Low (1-4)	58%	24%	14%	1%	3%
Medium (5-6)	33%	34%	29%	2%	2%
High (7-10)	19%	35%	42%	2%	2%
Marital status					
(Re)Married	31%	33%	32%	1%	3%
Single living with a partner	32%	30%	34%	1%	3%
Single	37%	34%	24%	2%	3%
Divorced or separated	47%	28%	21%	2%	2%
Widow	48%	26%	21%	2%	3%
Globalisation is an opportunity					
Tend to agree	28%	33%	35%	2%	2%
Tend to disagree	39%	32%	25%	2%	2%
The impact of the crisis on jobs					
Has reached its peak	28%	38%	31%	1%	2%
The worst is still to come	38%	30%	28%	2%	2%

3. THE ACTORS BEST PLACED TO TACKLE THE CRISIS

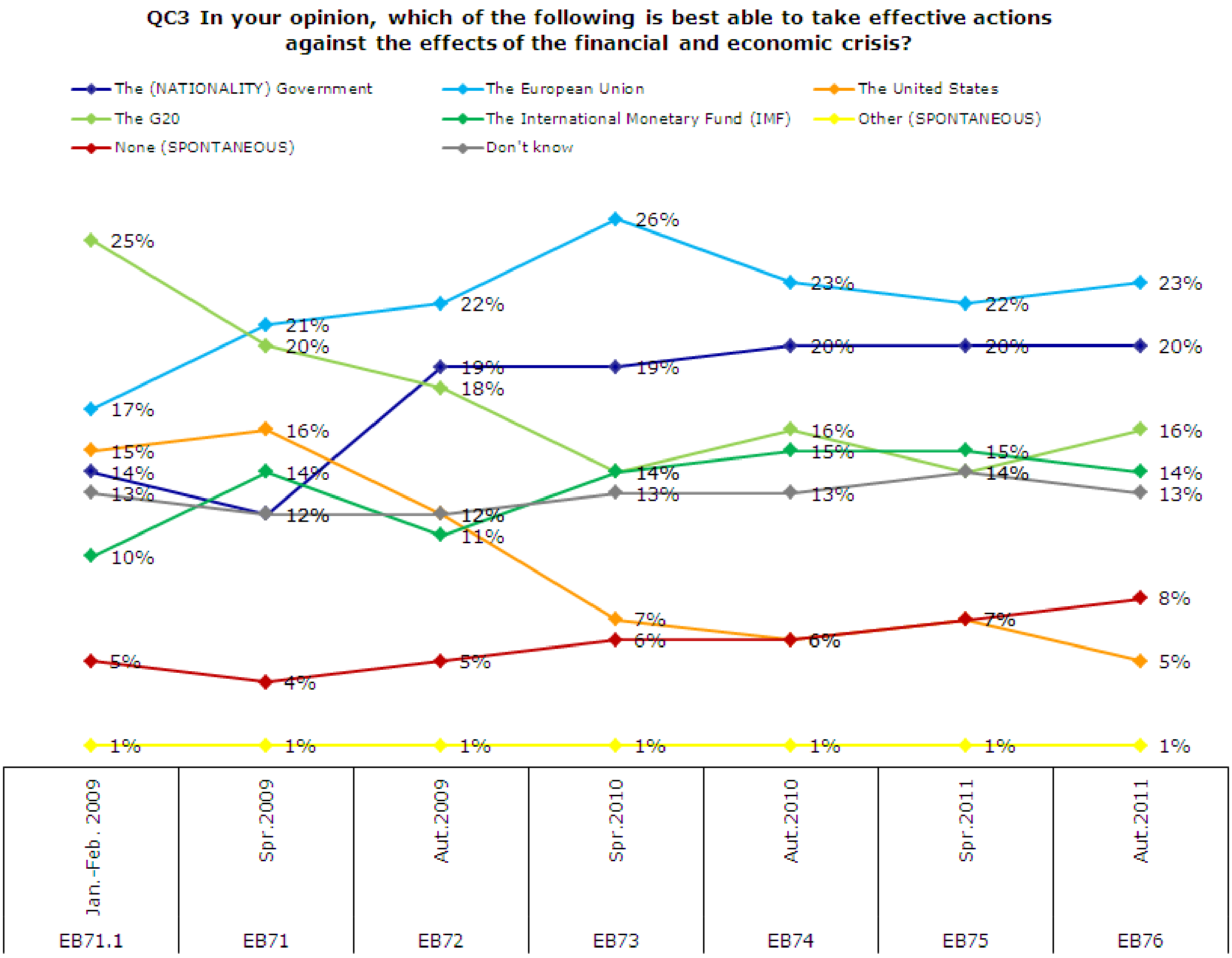


The ability of various international and national institutions to take effective action to deal with the crisis[51] had already been examined during the last five Eurobarometer surveys carried out since spring 2009. Respondents were asked to choose from a list of **international institutions** (the European Union, the G20 and the International Monetary Fund) and **national actors** (national governments and the United States). There have been few changes in the order in which the various institutions are ranked since the last survey in spring 2011.

The European Unions is still seen as best able to take effective action against the effects of the crisis (23%, +1 percentage point), ahead of the national **government** (20%, unchanged). **Support for the "European Union" option has gained ground in 10 Member States since spring 2011**. The largest increase was recorded in Malta (32%, +7 points), while losing most ground in Austria (15%, -8 points). The results are more or less unchanged in seven Member States (+ or – 1 point).

The G20 is mentioned by 16% of respondents (+2 points) and has now moved up from fourth to third place,, followed by the **International Monetary Fund** (14%, -1 point). Only 5% (-2 points) of respondents mentioned **the United States**.

[51] QC3a In your opinion, which of the following is best able to take effective actions against the effects of the financial and economic crisis? (ROTATE): The (NATIONALITY) Government; The European Union; the United States; The G20; The International Monetary Fund (IMF); Other (SPONTANEOUS); None (SPONTANEOUS); DK



Respondents in the eurozone countries are more likely than non-eurozone respondents to mention the European Union (25% and 21% respectively) and the IMF (15% and 12%). Conversely, they are far less likely than non-eurozone respondents to mention their national government (17%, versus 25%).

The European Union was mentioned by a significant number of respondents in Poland (39%), Luxembourg (33%) and Belgium, Greece and Malta (32% each) although in the latter country 33% of respondents cited their national government. It also tops the list in 12 other Member States: Bulgaria and Lithuania (30% each), Italy (27%), Hungary and Slovenia (26% each), Slovakia (jointly with the G20, 26%), Spain and Cyprus (25% each), Germany (24%), Estonia (23%), France (jointly with the national government, 22%) and Portugal (21%).

Respondents in the United Kingdom (37%), Romania (36%) and Malta (33%) are the staunchest supporters of their **national government** as the most effective level for tackling the effects of the financial and economic crisis. This option also enjoys particularly strong support in two candidate countries: Turkey (34%) and Montenegro (30%).

The G20 is most likely to be seen as an effective level of action in the Czech Republic (41%) and northern Europe: in Denmark and the Netherlands (both 28%) and Sweden (27%).

The same applies to the **IMF**: in Finland (31%), the Netherlands (26%) and Denmark (22%). However, as in autumn 2010 and spring 2011, it obtained its lowest score in Greece (3%).

Respondents in the Czech Republic (14%, compared with a European average of only 5%) are the most likely to mention the **United States**.

In the candidate countries, the IMF (22%) tops the list in Croatia, while respondents in the four other candidate countries seem to rely more on their national government: that is the case in Turkey (34%), Montenegro (30%) and the Former Yugoslav Republic of Macedonia and Iceland (26% each).

Although changes at European level since spring 2011 are relatively minor, there have been some significant changes in some countries on certain items. For example, although support for the European Union has fallen sharply in Austria (15%, -8 points), it has increased by a similar proportion in Malta (32%, +7).

The national government has gained ground in Romania (36%, +12), Greece (22%, +9) and Lithuania (18%, +8), while support for this answer has fallen by almost ten points in Cyprus (12%, -9).

Support for the G20 (16%, +2) has gained ground in Greece (13%, +9), Germany (23%, +7), Luxembourg (22%, +7) and Cyprus (18%, +7). However, it has lost 10 points in Hungary (15%).

Finally, the IMF has lost seven points in Germany (14%) and five percentage points in Austria (26%), while gaining significant ground in the Netherlands (26%, +5) and Sweden (15%, +5).

QC3 In your opinion, which of the following is best able to take effective actions against the effects of the financial and economic crisis?

	The European Union	Diff. Aut.2011 - Spr.2011	The (NATIONALITY) Government	Diff. Aut.2011 - Spr.2011	The G20	Diff. Aut.2011 - Spr.2011	The International Monetary Fund (IMF)	Diff. Aut.2011 - Spr.2011
EU27	23%	+1	20%	=	16%	+2	14%	-1
BE	32%	+3	13%	-4	23%	+3	18%	=
BG	30%	-3	15%	=	20%	+1	9%	+2
CZ	8%	-5	5%	+1	41%	-1	16%	+1
DK	17%	+3	14%	-4	28%	+4	22%	+4
DE	24%	+4	16%	-1	23%	+7	14%	-7
EE	23%	-5	14%	+3	20%	+3	16%	+2
IE	22%	-4	24%	+3	7%	+1	17%	+2
EL	32%	-2	22%	+9	13%	+9	3%	-1
ES	25%	=	21%	+2	9%	+2	11%	=
FR	22%	+4	22%	+1	17%	-1	17%	+1
IT	27%	-1	15%	-4	12%	+4	14%	-2
CY	25%	+1	12%	-9	18%	+7	20%	=
LV	18%	-1	16%	+6	22%	-2	12%	+4
LT	30%	+4	18%	+8	13%	-2	11%	+2
LU	33%	-1	12%	-5	22%	+7	17%	-1
HU	26%	+1	18%	+5	15%	-10	16%	+4
MT	32%	+7	33%	-6	9%	+2	8%	+1
NL	22%	+6	10%	-6	28%	-4	26%	+5
AT	15%	-8	19%	-1	14%	+5	14%	-5
PL	39%	+5	13%	-2	7%	+1	11%	+2
PT	21%	-4	13%	+2	9%	+5	13%	-3
RO	25%	-2	36%	+12	13%	-1	7%	-1
SI	26%	+3	8%	-3	14%	=	17%	+1
SK	26%	-2	8%	-3	26%	+5	18%	-2
FI	23%	=	14%	=	17%	+1	31%	-2
SE	19%	+2	29%	-6	27%	+6	15%	+5
UK	8%	-2	37%	+2	12%	+3	13%	-1
CY (tcc)	20%	-17	17%	+7	5%	=	12%	-3
HR	17%	-2	20%	+4	11%	+3	22%	-2
TR	13%	+2	34%	+5	6%	-1	4%	+1
MK	20%	-7	26%	+7	11%	+3	15%	-2
IS	13%	-6	26%	+1	17%	-1	21%	+9
ME	23%	+3	30%	+5	5%	=	14%	+2

Respondents who see globalisation as an opportunity are more likely to mention the international institutions as best able to tackle the crisis (28% mention the European Union, compared with 19% of those who disagree with this vision of globalisation; 20% and 15% respectively cite the G20; 16% and 14% mention the IMF). The situation is the opposite in the case of national governments: 23% of those who see globalisation as a threat mentioned their national government as the actor best placed to deal effectively with the effects of the crisis, compared with 18% of those who see it as an opportunity.

Similarly, in terms of social categories, the "most advantaged" categories are more likely than those who place themselves at the bottom of the social scale to mention the European Union, the G20 and the IMF; and vice versa as regards national governments.

Finally, the respondents who consider that the impact of the crisis on jobs has reached its peak are more likely to mention the European Union (30%, compared with 21% of those who believe that the worst is still to come).

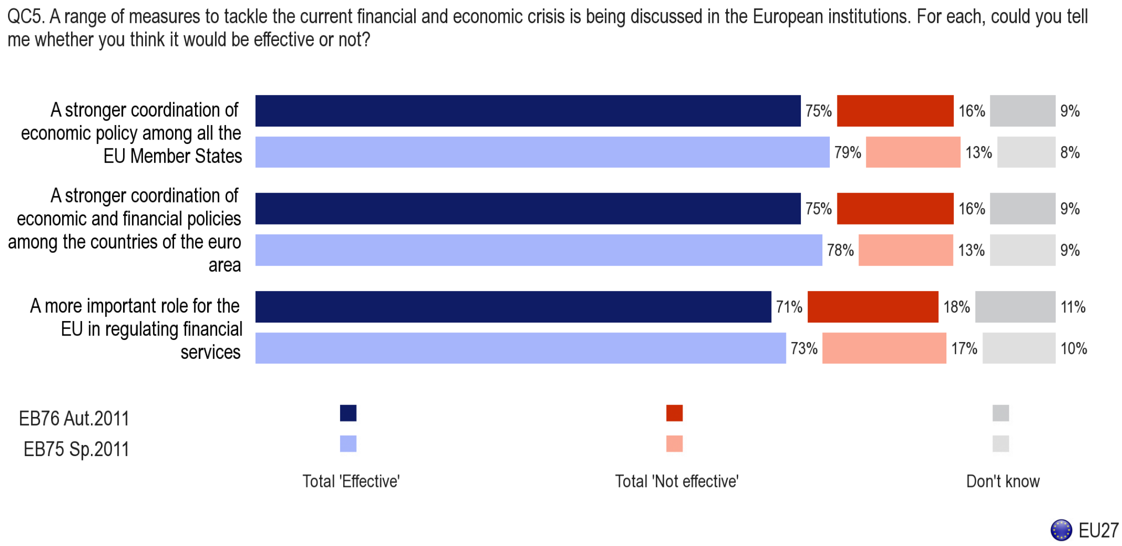
QC3a In your opinion, which of the following is best able to take effective actions against the effects of the financial and economic crisis?

	The European Union	The (NATIONALITY) Government	The G20	The International Monetary Fund (IMF)	The United States	Autre (SPONT.)	Aucun (SPONT.)	Don't know
EU27	23%	20%	16%	14%	5%	1%	8%	13%
Respondent occupation scale								
Self- employed	26%	19%	18%	14%	5%	1%	8%	9%
Managers	23%	17%	24%	17%	5%	0%	7%	7%
Other white collars	25%	17%	19%	18%	6%	1%	5%	9%
Manual workers	24%	21%	15%	14%	5%	1%	8%	12%
House persons	21%	23%	11%	11%	5%	1%	7%	21%
Unemployed	21%	24%	13%	11%	6%	2%	8%	15%
Retired	21%	22%	14%	14%	4%	1%	9%	15%
Students	26%	15%	17%	13%	9%	1%	6%	13%
Self-positioning on the social scale								
Low (1-4)	21%	21%	13%	12%	6%	1%	9%	17%
Medium (5-6)	23%	20%	16%	14%	5%	1%	8%	13%
High (7-10)	26%	19%	19%	16%	5%	1%	6%	8%
Globalisation is an opportunity								
Tend to agree	28%	18%	20%	16%	6%	1%	4%	7%
Tend to disagree	19%	23%	15%	14%	5%	1%	12%	11%
The impact of the crisis on jobs								
Has reached its peak	30%	20%	17%	14%	6%	1%	3%	9%
The worst is still to come	21%	21%	16%	15%	5%	1%	9%	12%

4. THE MOST EFFECTIVE MEASURES FOR DEALING WITH THE CRISIS

A very large majority of Europeans (75%, -4 points) consider that **closer coordination of economic policies between all the EU Member States** would be an effective way of dealing with the current financial and economic crisis[52]. An identical percentage of respondents mentioned a **stronger coordination of economic and financial policies among eurozone countries (-3 points)**. More than seven out of ten respondents (71%, -2 points) also consider that a **more important role for the European Union in regulating financial services** would be an effective measure

Nevertheless, the scores for each answer have fallen slightly since spring 2011.



For each proposed measure, support is far stronger in eurozone countries than in non-eurozone countries (differences of 12, 13 and 11 points respectively).

[52] QC5 A range of measures to tackle the current financial and economic crisis is being discussed in the European institutions. For each, could you tell me whether you think it would be effective or not? A more important role for the EU in regulating financial services; a stronger coordination of economic policy among all the EU Member States; a stronger coordination of economic and financial policies among the countries of the euro area.

QC5. A range of measures to tackle the current financial and economic crisis is being discussed in the European institutions. For each, could you tell me whether you think it would be effective or not?

	A stronger coordination of economic policy among all the EU Member States		A stronger coordination of economic and financial policies among the countries of the euro area		A more important role for the EU in regulating financial services	
	Total 'Effective'	Diff. Aut.2011-Spr.2011	Total 'Effective'	Diff. Aut.2011-Spr.2011	Total 'Effective'	Diff. Aut.2011-Spr.2011
EU27	75%	-4	75%	-3	71%	-2
Euro zone	80%	-3	79%	-3	74%	-5
Non-euro zone	68%	-2	66%	-3	63%	-1
BE	85%	-5	85%	-4	82%	-5
BG	78%	-7	75%	-7	74%	-4
CZ	68%	-7	67%	-8	64%	-7
DK	73%	-6	70%	-6	53%	+2
DE	81%	-1	83%	=	73%	-2
EE	68%	+3	68%	=	59%	-1
IE	74%	-5	73%	-5	70%	-10
EL	81%	-3	83%	+2	78%	=
ES	87%	=	85%	-1	83%	-2
FR	76%	-4	75%	-5	72%	-1
IT	76%	-8	74%	-10	73%	-11
CY	90%	-1	90%	-1	82%	-2
LV	65%	-3	66%	-2	59%	-3
LT	70%	+4	67%	+6	69%	+4
LU	86%	+2	87%	+3	79%	+1
HU	67%	-2	63%	-5	67%	=
MT	75%	-3	73%	-5	69%	-2
NL	79%	-4	81%	-2	69%	-6
AT	68%	-9	68%	-9	65%	-7
PL	79%	+4	74%	+4	70%	+4
PT	70%	-7	67%	-10	66%	-11
RO	74%	-6	72%	-7	75%	-1
SI	81%	-1	81%	-2	76%	-5
SK	85%	-2	84%	-2	81%	-2
FI	73%	-1	76%	-4	66%	-3
SE	67%	+1	69%	=	61%	+3
UK	59%	-5	58%	-3	54%	-4

84% of the respondents who see globalisation as an opportunity consider that closer coordination of economic policy between all the EU Member States would be effective, compared with 70% of those who see globalisation as a threat.

Similarly, the respondents who consider that the impact of the crisis on jobs has reached its peak (84%) and those who consider that reforms are necessary to face the future (79%) are more convinced of the need for a stronger coordination of economic policies than those who take the opposite view (74% and 61% respectively).

QC5.2 A range of measures to tackle the current financial and economic crisis is being discussed in the European institutions. For each, could you tell me whether you think it would be effective or not? A stronger coordination of economic policy among all the EU Member States

A stronger coordination of economic policy among all the EU Member States

	Total 'Effective'	Total 'Not effective'	Don't know
EU27	75%	16%	9%
Globalisation is an opportunity			
Tend to agree	84%	13%	3%
Tend to disagree	70%	23%	7%
The impact of the crisis on jobs			
Has reached its peak	84%	11%	5%
The worst is still to come	74%	18%	8%
Need for reforms despite present sacrifices			
Agree	79%	14%	7%
Disagree	61%	33%	6%

DOES THE ECONOMIC AND FINANCIAL SYSTEM NEED REFORM?

5.1 Necessary reforms to deal with the crisis and reduce public debt

Working together

Almost nine out of ten respondents (89%, -2 points since the Eurobarometer of spring 2011) are in favour of closer cooperation between the 27 Member States in order to tackle the crisis[53]. Only 7% (+1 point) take the opposite view. Eurozone respondents are more likely than those in non-eurozone countries to support closer cooperation (91% versus 87%).

Opinions have evolved the most positively in Sweden (93%, +4 points) while support for closer cooperation has lost the most ground in Austria (76%, -9 points).

QC4. For each of the following statements, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.
Answer: 'Total Agree' - %EU

	EB75 Spr.2011	EB76 Aut.2011	Diff. Aut.2011-Spr.2011
EU Member States should work together more in tackling the financial and economic crisis	91%	89%	-2
(OUR COUNTRY) needs reforms to face the future	86%	88%	+2
(ONLY TO SPLIT A) Measures to reduce the public deficit and debt in (OUR COUNTRY) cannot be delayed	77%	84%	+7
(ONLY TO SPLIT B) Measures to reduce the public deficit and debt in (OUR COUNTRY) are not a priority for now	41%	40%	-1

[53] QC4 For each of the following statements, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree: OUR COUNTRY) needs reforms to face the future; EU Member States should work together more in tackling the financial and economic crisis; measures to reduce the public deficit and debt in (OUR COUNTRY) cannot be delayed (IF 'SPLIT A'); measures to reduce the public deficit and debt in (OUR COUNTRY) are not a priority for now (IF 'SPLIT B').

QC4 For each of the following statements, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.

	EU Member States should work together more in tackling the financial and economic crisis		(OUR COUNTRY) needs reforms to face the future		(ONLY TO SPLIT A) Measures to reduce the public deficit and debt in (OUR COUNTRY) cannot be delayed		(ONLY TO SPLIT B) Measures to reduce the public deficit and debt in (OUR COUNTRY) are not a priority for now	
	Total 'Agree'	Diff. Aut.2011 - Spr.2011	Total 'Agree'	Diff. Aut.2011 - Spr.2011	Total 'Agree'	Diff. Aut.2011 - Spr.2011	Total 'Agree'	Diff. Aut.2011 - Spr.2011
EU27	89%	-2	88%	+2	84%	+7	40%	-1
BE	95%	+1	93%	+2	93%	+7	37%	-5
BG	93%	-1	93%	-1	71%	+11	42%	+3
CZ	89%	-2	76%	+2	81%	+2	34%	-7
DK	88%	=	70%	-10	77%	+1	44%	+11
DE	94%	+1	87%	+1	92%	+5	37%	+1
EE	95%	+2	86%	+2	73%	+4	59%	+1
IE	87%	-4	90%	-1	82%	-3	35%	-12
EL	90%	-1	95%	+6	79%	+1	36%	+5
ES	93%	=	97%	+2	83%	+6	51%	+7
FR	90%	-2	87%	+3	83%	+14	24%	-10
IT	88%	-1	89%	+2	85%	+3	44%	-1
CY	98%	=	96%	-3	90%	+15	21%	-1
LV	90%	-2	86%	=	80%	+10	51%	+10
LT	92%	+2	92%	+1	83%	+13	60%	+6
LU	96%	+3	69%	-8	76%	+2	38%	=
HU	90%	=	83%	+3	81%	-2	63%	+15
MT	92%	=	89%	+2	87%	+16	28%	-5
NL	90%	=	81%	-6	77%	+5	31%	-3
AT	76%	-9	79%	+4	84%	+3	40%	-14
PL	91%	+3	93%	+7	82%	+15	53%	+7
PT	82%	-5	86%	-1	77%	=	40%	-6
RO	86%	=	85%	+2	65%	+7	51%	+3
SI	94%	=	92%	+7	93%	+11	63%	+5
SK	94%	=	80%	+5	88%	+10	46%	+6
FI	90%	-2	94%	-2	88%	+5	64%	-1
SE	93%	+4	90%	-3	85%	+8	51%	-5
UK	82%	-3	87%	=	84%	+5	32%	+1
CY (tcc)	NA	NA	83%	+9	80%	+15	34%	-9
HR	NA	NA	95%	+11	89%	+8	41%	-3
TR	NA	NA	71%	+12	61%	+1	50%	-10
MK	NA	NA	84%	=	66%	+9	46%	-5
IS	NA	NA	99%	+2	80%	+9	36%	+1
ME	NA	NA	91%	+4	76%	+7	45%	+4

Reforms to face the future

A very large majority of Europeans support the idea that reforms are needed to face the future (88%, +2 points). There is almost unanimous support for this opinion in Spain (97%).
Poland (93%, +7 points) and Slovenia (92%, +7 points) are the Member States in which opinions have evolved the most positively. Support has also increased strongly in two candidate countries: Turkey (71%, +12 points) and Croatia (95%, +11 points).
Conversely, support has fallen the most markedly in Denmark (70%, -10 points).

The public deficit and debt

For the question of public deficits and debt, **we divided the total sample into two halves and used a differently worded statement for each group**:
- **a positive wording** (**SPLIT A** – "Measures to reduce the public deficit and debt in (OUR COUNTRY) **cannot be delayed"**)
- **a negative wording** (**SPLIT B** – "Measures to reduce the public deficit and debt in (OUR COUNRY) **are not a priority for now"**).

More than eight out of ten respondents (84%) agree that measures to reduce the public deficit and debt in their country cannot be delayed, a sharp increase of seven points since spring 2011. Only 9% (-5 points) do not agree. Respondents in the EU15 countries are more likely to agree that such measures cannot be delayed (85%, versus 78% in the NMS12 countries). This is also true of eurozone respondents (85%, versus 80% of non-eurozone respondents).
Support for this opinion has increased spectacularly in Malta (87%, +16 points), Cyprus (90%, +15), Poland (82%, +15), France (83%, +14) and Lithuania (83%, +13).

When the opposite wording is used ("Measures to reduce the public deficit and debt in (OUR COUNTRY) are not a priority for now"), four out of ten respondents (40%, -1 percentage point) consider that measures to reduce the public deficit and debt are not a priority. Support has gained the most ground in Hungary (63%, +15 points), Denmark (44%, +11) and Latvia (51%, +10).

However, an absolute majority of Europeans (51%, +2 points) do not agree with this statement. These measures are seen as a priority by 55% of respondents in the EU15 countries (versus 37% in the NMS12 countries) and by 54% of respondents in the eurozone countries (versus 46% of non-eurozone respondents).
This to some extent confirms the SPLIT A results, even if the intensity of the answers varies significantly depending on the wording of the question.

Socio-demographic analysis

Respondents who left school at the age of 15 or earlier tend to be less enthusiastic than the most educated respondents about these proposals. For example, 55% of those who studied up to the age of 20 or beyond disagree that "measures to reduce the public deficit and debt are not a priority for now" compared with only 45% of those who completed their education at the age of 15 or earlier. This trend is also evident among the respondents who place themselves at the bottom of the social scale.

The respondents for whom globalisation is an opportunity are more likely to support closer cooperation between the Member States (95% versus 86% of those who do not see globalisation as an opportunity), the need for reforms (92% versus 87%) and the idea that measures to reduce the public deficit and debt cannot be delayed (89% versus 81%).

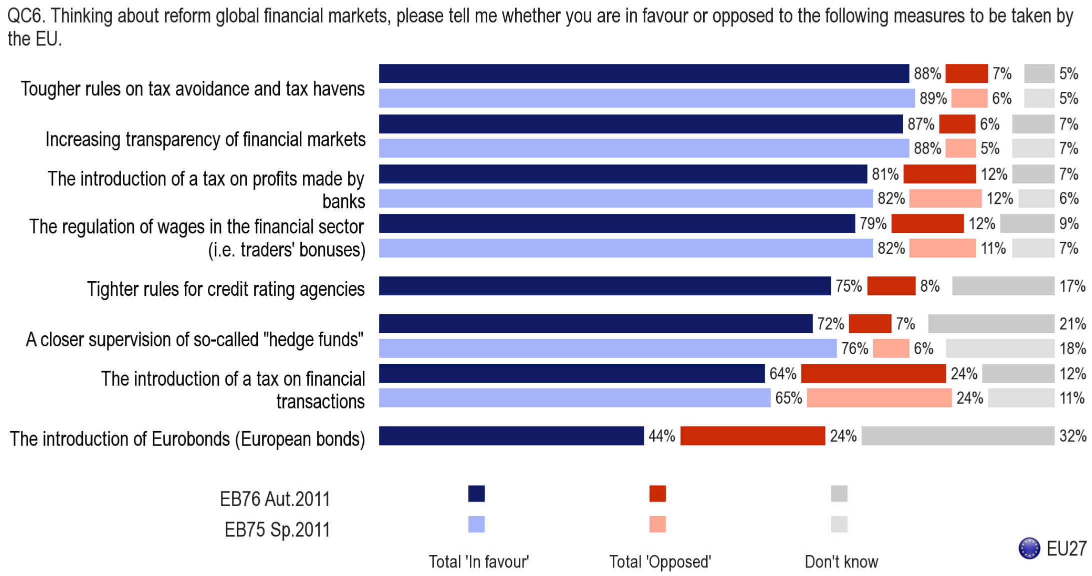
Finally, respondents who consider that the impact of the crisis on jobs has peaked are more likely to agree both that measures to reduce the public deficit and debt cannot be delayed (88% versus 83%), and with the corresponding statement worded negatively (45% versus 40%).

QC4 For each of the following statements, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree. (OUR COUNTRY) needs reforms to face the future

	EU Member States should work together more in tackling the financial and economic crisis			(OUR COUNTRY) needs reforms to face the future			(SPLIT A) Measures to reduce the public deficit and debt in (OUR COUNTRY) cannot be delayed			(SPLIT B) Measures to reduce the public deficit and debt in (OUR COUNTRY) are not a priority for now		
	Total 'Agree'	Total 'Disagree'	Don't know	Total 'Agree'	Total 'Disagree'	Don't know	Total 'Agree'	Total 'Disagree'	Don't know	Total 'Agree'	Total 'Disagree'	Don't know
EU27	89%	7%	4%	88%	8%	4%	84%	9%	7%	40%	51%	9%
Education (End of)												
15-	85%	8%	7%	86%	7%	7%	79%	10%	11%	41%	45%	14%
16-19	90%	7%	3%	88%	8%	4%	84%	9%	7%	40%	52%	8%
20+	92%	6%	2%	91%	7%	2%	86%	10%	4%	41%	55%	4%
Still studying	91%	5%	4%	88%	8%	4%	84%	7%	9%	40%	51%	9%
Self-positioning on the social scale												
Low (1-4)	87%	7%	6%	86%	8%	6%	78%	11%	11%	42%	45%	13%
Medium (5-6)	90%	6%	4%	89%	7%	4%	85%	9%	6%	38%	54%	8%
High (7-10)	91%	6%	3%	90%	8%	2%	86%	10%	4%	44%	51%	5%
Globalisation is an opportunity												
Tend to agree	95%	4%	1%	92%	7%	1%	89%	8%	3%	42%	53%	5%
Tend to disagree	86%	11%	3%	87%	10%	3%	81%	13%	6%	40%	54%	6%
The impact of the crisis on jobs												
Has reached its peak	92%	6%	2%	91%	7%	2%	88%	8%	4%	45%	50%	5%
The worst is still to come	89%	7%	4%	89%	8%	3%	83%	11%	6%	40%	53%	7%

5.2 What measures should be adopted to reform the economic and financial system?

Respondents were asked whether they supported or were opposed to eight measures to be taken by the EU to reform global financial markets[54]. Respondents had already been asked for their views on six of these measures in earlier Eurobarometer surveys, in particular in spring 2011. The two new measures were: "tighter rules for credit rating agencies" and "the introduction of Eurobonds (European bonds)".



As in the spring 2011 survey, the vast majority of respondents support these measures, even if the scores have decreased this time (by between one and four points for the first six measures since spring 2011).

[54] QC6 Thinking about reform global financial markets, please tell me whether you are in favour or opposed to the following measures to be taken by the EU: tougher rules on tax avoidance and tax havens; the introduction of a tax on profits made by banks; the introduction of a tax on financial transactions; the regulation of wages in the financial sector (i.e. traders' bonuses); a closer supervision of so-called "hedge funds"; increasing transparency of financial markets; the introduction of Eurobonds (European bonds); tighter rules for credit rating agencies.

For all the proposed measures, there are sometimes very significant differences between countries. In particular eurozone respondents are more positive than non-eurozone respondents about seven of the eight measures (differences of between 3 and 19 percentage points). Only “the introduction of Eurobonds” obtained similar results both inside and outside the eurozone (44%).

QC6 Thinking about reform global financial markets, please tell me whether you are in favour or opposed to the following measures to be taken by the EU.

	Tougher rules on tax avoidance and tax havens		Increasing transparency of financial markets		The introduction of a tax on profits made by banks		The regulation of wages in the financial sector (i.e. traders' bonuses)		A closer supervision of so-called "hedge funds"		The introduction of a tax on financial transactions	
	Total 'In favor'	Diff. Aut.2011-Spr.2011	Total 'In favor'	Diff. Aut.2011-Spr.2011	Total 'In favor'	Diff. Aut.2011-Spr.2011	Total 'In favor'	Diff. Aut.2011-Spr.2011	Total 'In favor'	Diff. Aut.2011-Spr.2011	Total 'In favor'	Diff. Aut.2011-Spr.2011
EU27	88%	-1	87%	-1	81%	-1	79%	-3	72%	-4	64%	-1
Euro zone	90%	-2	89%	-2	83%	-1	82%	-4	76%	-5	71%	-1
Non-euro zone	85%	-1	84%	=	80%	+1	75%	-1	63%	-2	52%	-1
BE	91%	+1	91%	-1	86%	+1	87%	+1	83%	+1	69%	+1
BG	83%	+1	84%	-6	80%	-6	78%	=	51%	+5	64%	+9
CZ	92%	-1	87%	=	86%	-2	81%	+1	68%	-15	66%	=
DK	92%	-1	91%	+1	77%	-4	60%	-3	66%	-8	56%	-6
DE	94%	+1	92%	-1	89%	=	84%	-1	86%	-3	82%	+3
EE	78%	-3	85%	-1	75%	-2	70%	-1	79%	-2	49%	-2
IE	89%	=	88%	-2	92%	+1	87%	-4	82%	-6	53%	-2
EL	95%	=	94%	-1	96%	-1	82%	-5	92%	-4	75%	-4
ES	91%	-1	92%	-1	81%	+6	88%	-3	63%	-8	68%	+4
FR	88%	=	89%	+2	85%	+1	83%	-1	76%	+1	75%	+2
IT	83%	-7	83%	-6	75%	-6	73%	-9	71%	-12	66%	-9
CY	96%	+2	96%	+1	94%	+5	76%	-2	93%	-2	50%	-12
LV	68%	-6	85%	-4	72%	-1	73%	-3	51%	-16	54%	-4
LT	81%	+6	89%	+1	84%	+5	81%	+4	59%	-5	66%	+2
LU	75%	=	89%	+3	75%	+2	82%	+2	79%	-1	63%	+3
HU	91%	-1	91%	-1	82%	-3	83%	=	89%	=	65%	+2
MT	76%	+2	79%	-3	42%	-5	47%	-3	40%	-12	24%	=
NL	94%	=	91%	-1	71%	-6	82%	-2	73%	-3	37%	-2
AT	90%	-2	87%	-3	79%	-5	86%	-3	84%	-2	79%	-4
PL	81%	+1	86%	+2	79%	+7	70%	=	52%	+2	48%	=
PT	81%	-6	83%	-5	82%	-3	80%	-6	75%	-10	72%	-10
RO	87%	-1	72%	-8	77%	-1	65%	-5	58%	-7	58%	-5
SI	92%	+2	93%	-1	87%	+3	92%	+1	70%	-7	64%	+3
SK	97%	+1	92%	=	88%	-1	90%	=	82%	=	78%	+1
FI	89%	-1	89%	-1	79%	-1	80%	+5	69%	-7	55%	+1
SE	94%	+4	86%	+5	80%	+1	77%	-1	68%	-3	53%	+2
UK	84%	-2	82%	=	80%	+1	79%	=	67%	-2	45%	-3
CY (tcc)	77%	-5	70%	+8	53%	-7	58%	-8	69%	-3	47%	-9
HR	90%	+2	85%	=	88%	=	84%	+1	73%	+3	73%	=
TR	63%	+1	60%	-3	65%	+6	54%	-2	49%	+5	56%	-3
MK	85%	+1	75%	-1	71%	+1	73%	+2	47%	-2	57%	+1
IS	90%	-1	92%	-2	84%	=	86%	-3	85%	-6	53%	-4
ME	79%	-4	72%	-7	84%	-1	75%	-5	64%	-9	70%	-3

The introduction of a tax on financial transactions is supported by a majority in all the socio-demographic categories. Nevertheless, men are more likely than women to support the introduction of a tax on financial transactions (67% versus 62%), as are respondents aged 40 or over (66-67%, versus 56% of those aged 15 to 24). Opposition to such a tax is stronger among students (33%) and those who place themselves at the top of the social scale (28%).

QC6.3 Thinking about reform global financial markets, please tell me whether you are in favour or opposed to the following measures to be taken by the EU. The introduction of a tax on financial transactions

The introduction of a tax on financial transactions

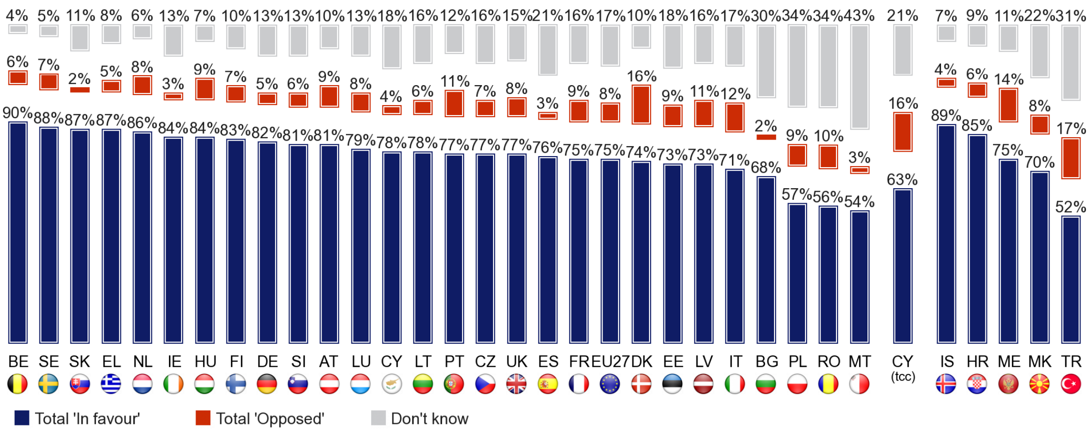
	Total 'Agree'	Total 'Disagree'	Don't know
EU27	64%	24%	12%
Gender			
Male	67%	24%	9%
Female	62%	23%	15%
Age			
15-24	56%	31%	13%
25-39	63%	27%	10%
40-54	67%	23%	10%
55 +	66%	19%	15%
Education (End of)			
15-	64%	18%	18%
16-19	66%	23%	11%
20+	66%	26%	8%
Still studying	55%	33%	12%
Respondent occupation scale			
Self- employed	65%	26%	9%
Managers	66%	28%	6%
Other white collars	66%	26%	8%
Manual workers	65%	24%	11%
House persons	61%	18%	21%
Unemployed	65%	21%	14%
Retired	66%	19%	15%
Students	55%	33%	12%
Self-positioning on the social scale			
Low (1-4)	64%	20%	16%
Medium (5-6)	66%	23%	11%
High (7-10)	62%	28%	10%
Globalisation is an opportunity			
Tend to agree	67%	26%	7%
Tend to disagree	68%	23%	9%
The impact of the crisis on jobs			
Has reached its peak	68%	23%	9%
The worst is still to come	64%	25%	11%

Rating agencies

A clear majority of respondents in all Member States are in favour of "tighter rules for credit agencies", although the strength of support varies from one Member State to another: more than 85% of respondents in Belgium (90%), Sweden (88%), Slovakia (87%), Greece (87%) and the Netherlands (86%) support this idea compared with fewer than 60% in Poland (57%), Romania (56%) and Malta (54%). Nevertheless, it should be noted that the difference between Member States is reflected more in the 'DK' rate, which is sometimes very high (as high as 43% in Malta), than in the proportion of respondent who oppose the measure, which is very low in all Member States, the highest score being recorded in Denmark (16%). It is also true as regards the difference between the average in the eurozone (where 78% of respondents support this measure versus 8% who oppose it) and outside it (70% versus 9%).

QC6.8. Thinking about reform global financial markets, please tell me whether you are in favour or opposed to the following measures to be taken by the EU.

Tighter rules for credit rating agencies



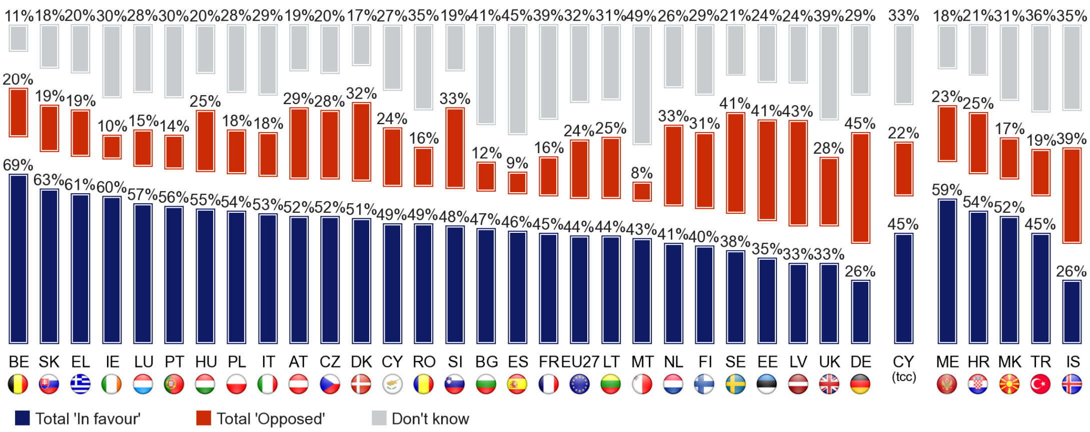
Eurobonds

Only one measure, tested for the first time, is supported by no more than four out of ten respondents (44%). This is the introduction of Eurobonds (European bonds). Almost a quarter (24%) of respondents are against the idea and 32% expressed no opinion. This very high 'DK' rate shows the extent to which Europeans are still unsure what the concept involves.

A majority of respondents in 22 Member States support "the introduction of Eurobonds". Support is strongest in Belgium (69%), Slovakia (63%), Greece (61%) and Ireland (60%) where six or more people out of ten are in favour of Eurobonds. Conversely, the introduction of Eurobonds has minority support in five Member States, the lowest score being recorded in Germany where only 26% of respondents support this measure. Support for the introduction of Eurobonds is the same inside and outside the eurozone (44%).

QC6.7. Thinking about reform global financial markets, please tell me whether you are in favour or opposed to the following measures to be taken by the EU.

The introduction of Eurobonds (European bonds)



The introduction of Eurobonds enjoys greater support among men (48%, compared with 40% of women), respondents aged between 25 and 39 (49%, compared with 39% of those aged over 55), and among the most advantaged social categories: 50% of respondents who studied until the age of 20 or beyond; 53% of self-employed people; and 48% of those who place themselves at the top of the social scale.

Similarly, the respondents who see globalisation as an opportunity (50%) and those who think that the impact of the crisis on jobs has peaked (53%) are also more likely to support the introduction of Eurobonds than those who take the opposite view.

QC6.7 Thinking about reform global financial markets, please tell me whether you are in favour or opposed to the following measures to be taken by the EU. The introduction of Eurobonds (European bonds)

The introduction of Eurobonds (European bonds)

	Total 'In favour'	Total 'Opposed'	Don't know
EU27	44%	24%	32%
Gender			
Male	48%	26%	26%
Female	40%	22%	38%
Age			
15-24	44%	22%	34%
25-39	49%	22%	29%
40-54	46%	25%	29%
55 +	39%	26%	35%
Education (End of)			
15-	36%	22%	42%
16-19	44%	25%	31%
20+	50%	26%	24%
Still studying	45%	22%	33%
Respondent occupation scale			
Self- employed	53%	23%	24%
Managers	46%	33%	21%
Other white collars	51%	24%	25%
Manual workers	46%	23%	31%
House persons	38%	18%	44%
Unemployed	43%	20%	37%
Retired	39%	25%	36%
Students	45%	22%	33%
Self-positioning on the social scale			
Low (1-4)	39%	20%	41%
Medium (5-6)	44%	25%	31%
High (7-10)	48%	28%	24%
Globalisation is an opportunity			
Tend to agree	50%	26%	24%
Tend to disagree	44%	28%	28%
The impact of the crisis on jobs			
Has reached its peak	53%	21%	26%
The worst is still to come	43%	26%	31%

MEDIA USE IN THE EUROPEAN UNION

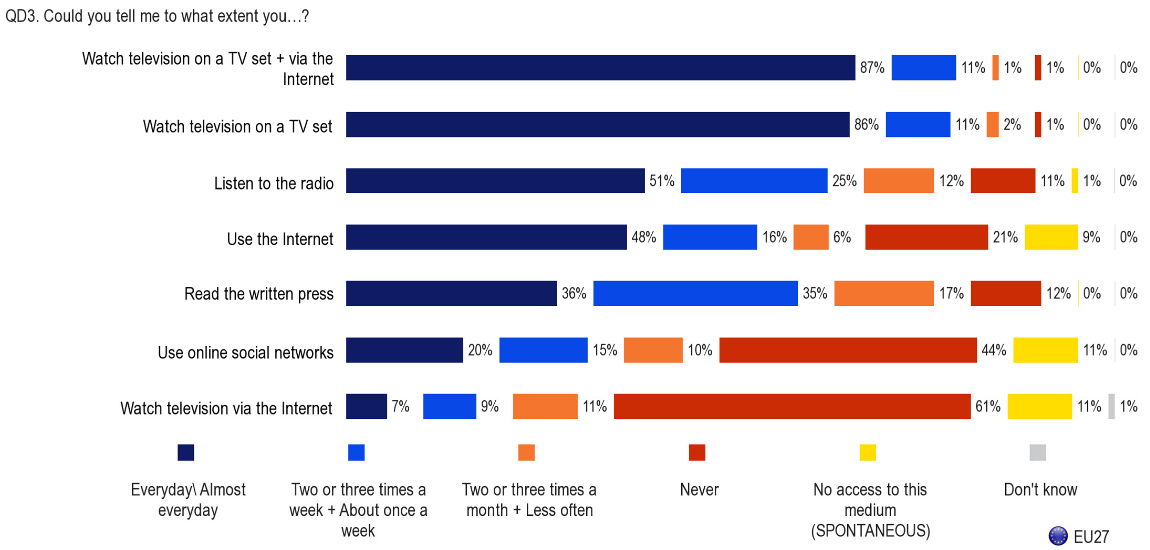
1. MEDIA USE AND TRUST IN THE MEDIA

- Television remains the most widely used medium, but Europeans continue to place the most trust in radio -

1.1 Media uses

Television remains far the most popular medium with Europeans: 87%[55] watch it every day or almost every day (+2 points since EB74 in autumn 2010). In total, 98% of Europeans watch television at least once a week.

Europeans still watch television predominantly on a TV set (97% at least once a week). For the first time, we asked respondents whether they watched television via the Internet, and the results show that this practice is still fairly marginal (16% at least once a week).



55 Total of the proportion of Europeans who watch television every day or almost every day on a TV set or via the Internet

Daily or near-daily consumption of television on a TV set is particularly high in the 55+ age group (92% every day or almost every day) and, logically, among retired people (93%). The figures for young people aged 15 to 24 (76%) and students (73%) are a little lower. There are also slight differences according to the respondent's level of education: 92% of Europeans who left school before the age of 16 watch television on a TV set every day or almost every day, compared with 82% of those who studied until the age of 20 or beyond.

QD3.1 Could you tell me to what extent you...?

Watch television on a TV set

	Everyday\ Almost everyday	Two or three times a week + About once a week	Two or three times a month + Less often	Never	No access to this medium (SPONTANEOUS)	Don't know	Subtotal 'At least once a week'
EU27	86%	11%	2%	1%	0%	0%	97%
Age							
15-24	76%	17%	4%	2%	0%	1%	93%
25-39	82%	14%	2%	2%	0%	0%	96%
40-54	85%	12%	1%	2%	0%	0%	97%
55 +	92%	6%	1%	1%	0%	0%	98%
Education (End of)							
15-	92%	6%	1%	1%	0%	0%	98%
16-19	87%	10%	2%	1%	0%	0%	97%
20+	82%	14%	2%	2%	0%	0%	96%
Still studying	73%	20%	5%	2%	0%	0%	93%
Respondent occupation scale							
Self- employed	81%	15%	2%	2%	0%	0%	96%
Managers	80%	16%	2%	2%	0%	0%	96%
Other white collars	84%	13%	2%	1%	0%	0%	97%
Manual workers	85%	12%	2%	1%	0%	0%	97%
House persons	91%	7%	1%	1%	0%	0%	98%
Unemployed	86%	9%	3%	1%	1%	0%	95%
Retired	93%	5%	1%	1%	0%	0%	98%
Students	73%	20%	5%	2%	0%	0%	93%

Young people (13% every day or almost every day in the 15-24 age group compared with the average of 7%), students (14%) and managers (10%) are the most likely to watch television via the Internet.
In all European Union countries, at least three-quarters of respondents watch television *on a TV set* every day or almost every day.

The countries where respondents are the most likely to watch television via the Internet are Sweden (34% at least once a week), Finland (29%), the United Kingdom (26%), the Netherlands (23%) and Denmark (22%).

QD3.2 Could you tell me to what extent you...?

Watch television via the Internet

	Everyday\ Almost everyday	Two or three times a week + About once a week	Two or three times a month + Less often	Never	No access to this medium (SPONTANEOUS)	Don't know	Subtotal 'At least once a week'
EU27	7%	9%	11%	61%	11%	1%	16%
Age							
15-24	13%	17%	17%	50%	3%	0%	30%
25-39	10%	13%	16%	56%	5%	0%	23%
40-54	6%	9%	12%	65%	7%	1%	15%
55 +	3%	4%	5%	66%	22%	0%	7%
Education (End of)							
15-	2%	3%	3%	66%	25%	1%	5%
16-19	6%	8%	11%	64%	10%	1%	14%
20+	9%	13%	17%	57%	4%	0%	22%
Still studying	14%	21%	18%	45%	2%	0%	35%
Respondent occupation scale							
Self- employed	8%	8%	14%	62%	8%	0%	16%
Managers	10%	16%	21%	51%	2%	0%	26%
Other white collars	8%	11%	16%	61%	4%	0%	19%
Manual workers	7%	9%	12%	64%	7%	1%	16%
House persons	4%	6%	7%	68%	14%	1%	10%
Unemployed	6%	8%	10%	65%	10%	1%	14%
Retired	3%	3%	4%	64%	25%	1%	6%
Students	14%	21%	18%	45%	2%	0%	35%

Radio is still the second most popular medium with Europeans, but its popularity has slipped since the Eurobarometer survey of autumn 2010: 51% listen to the radio every day or almost every day, a five-point decline. In total, 76% of Europeans listen to the radio at least once a week (-3 points).

Europeans aged 40 to 54 are the most likely to listen to the radio every day or almost every day (55%, versus 39% of those aged 15 to 24). The most educated respondents (61% of those who studied until the age of 20 or beyond, compared with 42% of those who left school before the age of 16) and managers (65%, versus 56% of white-collar workers, 53% of manual workers and 37% of house persons and unemployed people) are also more likely to listen to the radio.

The proportion of respondents who listen to the radio every day or almost every day varies very significantly from one country to another: at least seven out of ten respondents in Luxembourg (70%), Germany (71%) and in particular Ireland (80%) fall into this category; however, listening to the radio is a far less widespread habit in Romania (28%), Portugal (26%) and Bulgaria (24%).
There are significant differences between the candidate countries. The proportion of daily radio listeners is very high in Iceland (83%) and just below the European average in Croatia (50%, versus 51% for the EU as a whole). It is lower in Montenegro (37%) and the Former Yugoslav Republic of Macedonia (19%), and lowest in Turkey (7%).

QD3.3 Could you tell me to what extent you...?

Listen to the radio

	Everyday\ Almost everyday	Two or three times a week + About once a week	Two or three times a month + Less often	Never	No access to this medium (SPONTANEOUS)	Don't know	Subtotal 'At least once a week'
EU27	51%	25%	12%	11%	1%	0%	76%
Age							
15-24	39%	32%	15%	14%	0%	0%	71%
25-39	51%	30%	11%	8%	0%	0%	81%
40-54	55%	23%	12%	9%	1%	0%	78%
55 +	53%	20%	12%	14%	1%	0%	73%
Education (End of)							
15-	42%	22%	14%	20%	2%	0%	64%
16-19	52%	26%	11%	10%	1%	0%	78%
20+	61%	23%	9%	7%	0%	0%	84%
Still studying	42%	30%	15%	13%	0%	0%	72%
Respondent occupation scale							
Self- employed	58%	23%	11%	8%	0%	0%	81%
Managers	65%	22%	8%	5%	0%	0%	87%
Other white collars	56%	27%	10%	6%	1%	0%	83%
Manual workers	53%	26%	11%	9%	0%	1%	79%
House persons	37%	26%	17%	18%	2%	0%	63%
Unemployed	37%	31%	15%	16%	1%	0%	68%
Retired	52%	21%	11%	15%	1%	0%	73%
Students	42%	30%	15%	13%	0%	0%	72%

More than seven out of ten Europeans read the **press** at least once a week (71%, -2 points). However, Europeans are less likely to read the press than listen to the radio on a daily basis (36% read the press every day or almost every day, -2); more than a third do so between one and three times a week (35%, =).

The most educated respondents (80% of those who studied up to the age of 20 or beyond read the press at least once a week, compared with 61% of those who left school before the age of 16) and managers (85%) are also more likely to read the press.

More than 80% of respondents read the press at least once a week in the Netherlands (84%), Ireland and Germany (87% in both cases), Austria and Luxembourg (89% in both countries), and Sweden and Finland (93%). In contrast, readership levels are the lowest in Cyprus and Portugal (60%), Malta (57%), Romania (43%) and Greece (42%). There appears therefore to be a North/South divide in the European Union when it comes to the press.

QD3.4 Could you tell me to what extent you...?

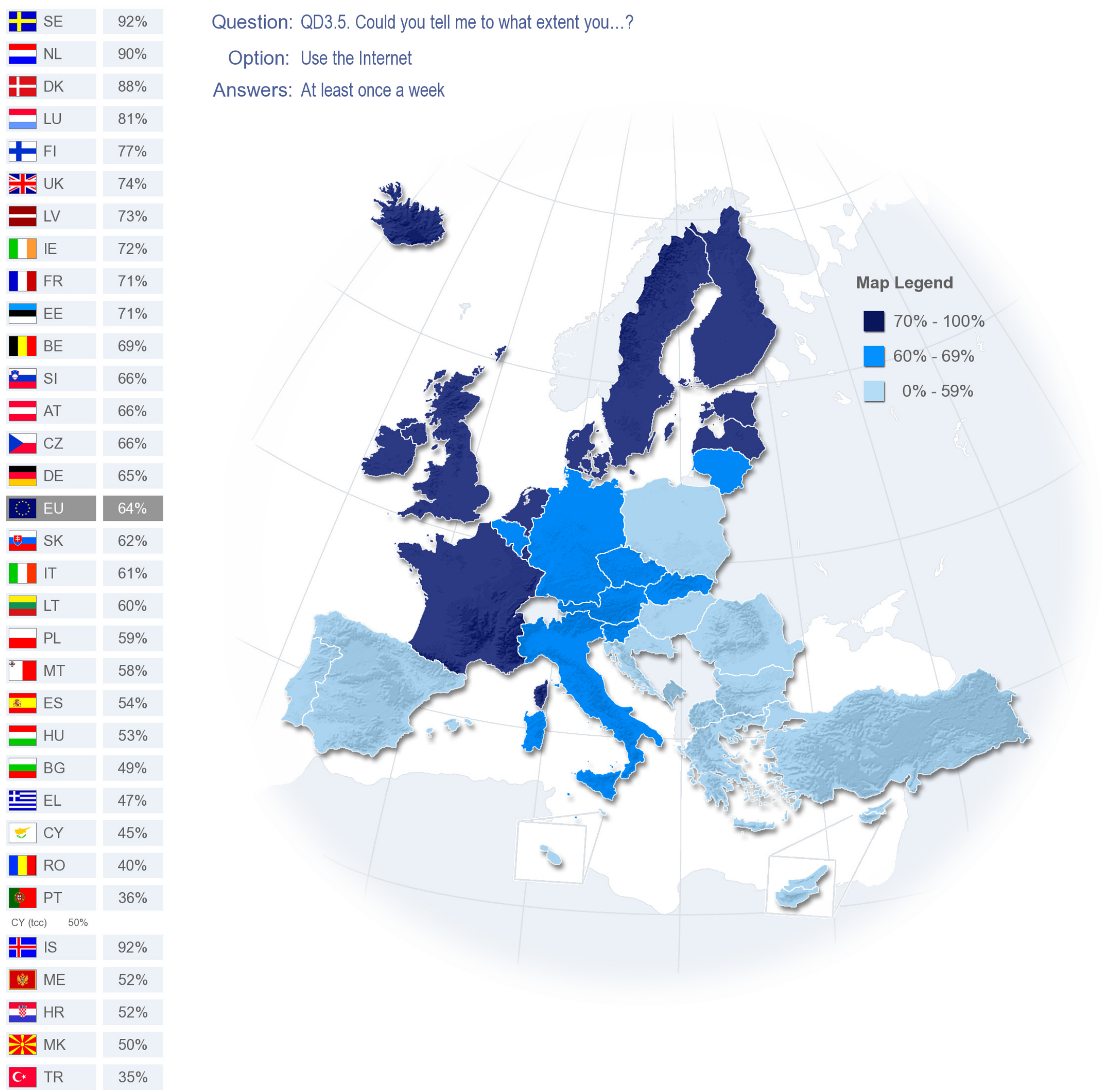
Read the written press

	Everyday\ Almost everyday	Two or three times a week + About once a week	Two or three times a month + Less often	Never	No access to this medium (SPONTANEOUS)	Don't know	Subtotal 'At least once a week'
EU27	36%	35%	17%	12%	0%	0%	71%
Age							
15-24	19%	40%	24%	16%	0%	1%	59%
25-39	30%	41%	19%	10%	0%	0%	71%
40-54	38%	36%	16%	9%	1%	0%	74%
55 +	45%	27%	12%	15%	1%	0%	72%
Education (End of)							
15-	32%	29%	17%	21%	1%	0%	61%
16-19	35%	37%	16%	11%	1%	0%	72%
20+	46%	34%	14%	6%	0%	0%	80%
Still studying	22%	40%	24%	14%	0%	0%	62%
Respondent occupation scale							
Self- employed	41%	36%	16%	7%	0%	0%	77%
Managers	52%	33%	11%	4%	0%	0%	85%
Other white collars	36%	38%	18%	8%	0%	0%	74%
Manual workers	31%	39%	18%	11%	0%	1%	70%
House persons	26%	30%	19%	23%	1%	1%	56%
Unemployed	20%	38%	24%	17%	1%	0%	58%
Retired	45%	27%	12%	15%	1%	0%	72%
Students	22%	40%	24%	14%	0%	0%	62%

A clear majority of Europeans also use the **Internet** at least once a week (64%, +1 point). The proportion of respondents who use it every day or almost every day is higher than for the press and has increased (48%, +3). In total, 30% of Europeans do not use the Internet (21% answered "never" and 9% spontaneously said that they do not have Internet access).

Daily or near-daily use of the Internet is particularly widespread among young people (79% of those aged 15 to 24, versus 23% of those aged 55 or over), students (86%), managers (79%, versus 65% of white-collar workers and 47% of manual workers) and the most educated respondents (68% versus 14% of those who left school earliest).

Respondents in Sweden (92% at least once a week, +5 points since autumn 2010), the Netherlands (90%), Denmark (88%) and Luxembourg (81%, +5 points) are the most frequent Internet users. Conversely, Internet use is the least widespread in Bulgaria (49%), Greece (47%), Cyprus (45%), Romania (40%) and Portugal (36%).



Together with Sweden and Luxembourg, the other countries where Internet use has increased the most since last year are Latvia (73% of respondents use it at least once a week, +8) and Estonia (71%, +5).

QD3.5 Could you tell me to what extent you...?

Use the Internet

	Everyday\ Almost everyday	Two or three times a week + About once a week	Two or three times a month + Less often	Never	No access to this medium (SPONTANEOUS)	Don't know	Subtotal 'At least once a week'
EU27	48%	16%	6%	21%	9%	0%	64%
Age							
15-24	79%	14%	3%	3%	1%	0%	93%
25-39	64%	19%	6%	8%	3%	0%	83%
40-54	50%	21%	8%	16%	5%	0%	71%
55 +	23%	11%	5%	41%	20%	0%	34%
Education (End of)							
15-	14%	10%	6%	47%	23%	0%	24%
16-19	45%	21%	7%	19%	8%	0%	66%
20+	68%	15%	5%	9%	3%	0%	83%
Still studying	86%	10%	2%	1%	1%	0%	96%
Respondent occupation scale							
Self- employed	55%	19%	7%	14%	5%	0%	74%
Managers	79%	13%	4%	3%	1%	0%	92%
Other white collars	65%	21%	6%	6%	2%	0%	86%
Manual workers	47%	22%	8%	18%	5%	0%	69%
House persons	29%	17%	6%	36%	12%	0%	46%
Unemployed	47%	18%	8%	19%	8%	0%	65%
Retired	20%	10%	4%	43%	23%	0%	30%
Students	86%	10%	2%	1%	1%	0%	96%

Online social networks are used regularly by just over a third of Europeans, slightly more than last year (35% at least once a week, +2 points). Almost 20% (+2) of respondents use them on a daily or almost daily basis. However, a majority of Europeans still do not use social networks: 44% (-3) answered "never" and 11% (+2) said that they did not have access to them.

There is a clear generational split on this question: 56% of those aged 15 to 24 use social networks every day or almost every day, compared with 29% of those aged 25 to 39, 14% of the 40 to 54 age group and 4% of those aged 55 or over. The gap between managers (23%), white-collar workers (25%) and manual workers (20%) is less pronounced.

The countries with the highest rate of social network use are the Netherlands (56% at least once a week), Latvia (55%), Denmark (54%) and Sweden (54%). The use of social networks is less developed in Germany (27%), Portugal (24%) and Romania (22%).

Since autumn 2010, social networking has gained the most ground in Luxembourg (47%, +11 points), Greece (36%, +10), the Czech Republic (33%, +10), Austria (43%, +9), Lithuania (41%, +8), Latvia (55%, +7), Slovakia (43%, +7) and Slovenia (40%, +7).

QD3.6 Could you tell me to what extent you...?

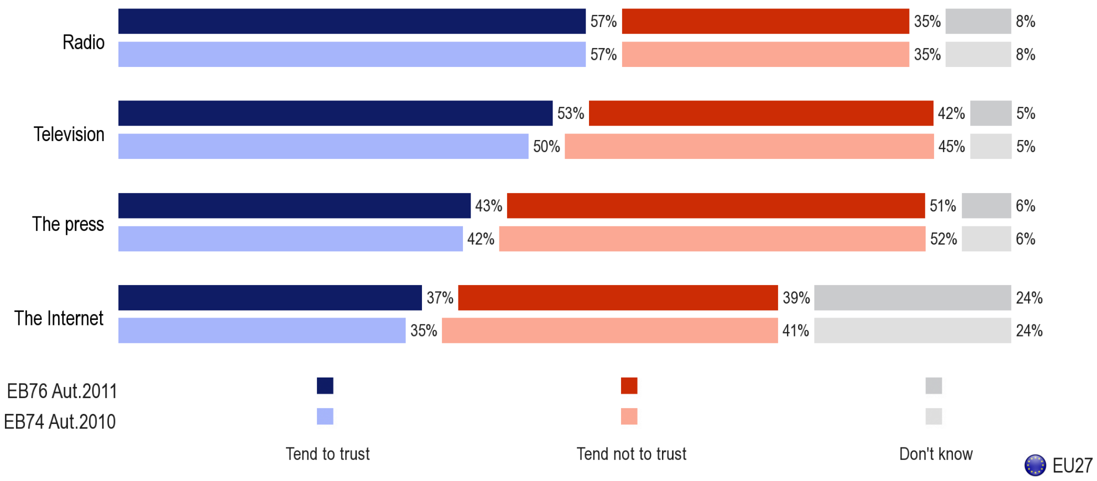
Use online social networks

	Everyday\ Almost everyday	Two or three times a week + About once a week	Two or three times a month + Less often	Never	No access to this medium (SPONTANEOUS)	Don't know	Subtotal 'At least once a week'
EU27	20%	15%	10%	44%	11%	0%	35%
Age							
15-24	56%	22%	8%	12%	2%	0%	78%
25-39	29%	24%	15%	29%	3%	0%	53%
40-54	14%	16%	14%	48%	7%	1%	30%
55 +	4%	5%	6%	63%	22%	0%	9%
Education (End of)							
15-	5%	5%	4%	60%	25%	1%	10%
16-19	17%	16%	12%	45%	9%	1%	33%
20+	23%	18%	15%	40%	4%	0%	41%
Still studying	60%	23%	7%	9%	1%	0%	83%
Respondent occupation scale							
Self- employed	19%	15%	15%	45%	6%	0%	34%
Managers	23%	23%	18%	35%	1%	0%	46%
Other white collars	25%	22%	16%	34%	3%	0%	47%
Manual workers	20%	17%	12%	44%	6%	1%	37%
House persons	12%	10%	7%	57%	13%	1%	22%
Unemployed	24%	18%	11%	37%	10%	0%	42%
Retired	3%	5%	4%	63%	25%	0%	8%
Students	60%	23%	7%	9%	1%	0%	83%

1.2 Trust in the media

The order in which Europeans rank the media in terms of trust[56] has not changed since the autumn 2010 Eurobarometer (EB74). Radio still inspires the most trust (57%, versus 35% 'distrust', unchanged), ahead of television, which nevertheless records a three-point rise in trust (53%, versus 42%, -3). Although the press is ranked third, it is still distrusted by a majority of respondents (43% 'trust', +1, versus 51%, -1). Finally, 37% of Europeans trust the Internet, a two-point rise since the previous year. Respondents are less likely to distrust it than the other media (39%, -2), but, in a context of lower use, almost a quarter of Europeans expressed no opinion on this subject (24%, =).

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



However, the percentage of respondents who trust the Internet is as high 52% among the youngest respondents (versus 40% who distrust it), and 51% among those who use it every day (versus 41%).

The respondent's level of education also creates significant differences: for example, trust in radio, the press and the Internet increases in line with the respondent's level of education: among those who studied until the age of 20 or beyond, 63% trust radio, 50% trust the press and 46% trust the Internet (versus 51%, 36% and 15% respectively of those who left school before the age of 16). The opposite is true as regards television: the least educated respondents are more likely to trust it than those who studied the longest (55% of the former versus 51% of the latter).

Trust levels are lower among respondents with financial difficulties: for all media, trust is systematically lower among the respondents who struggle to pay their bills most of the time than among those who almost never have such problems.

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

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

	Radio	Television	Presse	The Internet
EU27	57%	53%	43%	37%
Gender				
Male	58%	52%	44%	40%
Female	56%	54%	41%	34%
Age				
15-24	58%	54%	44%	52%
25-39	58%	51%	45%	49%
40-54	58%	52%	43%	40%
55 +	55%	55%	40%	21%
Education (End of)				
15-	51%	55%	36%	15%
16-19	57%	53%	41%	39%
20+	63%	51%	50%	46%
Still studying	59%	54%	47%	56%
Respondent occupation scale				
Self- employed	53%	45%	39%	42%
Managers	65%	53%	50%	49%
Other white collars	60%	51%	45%	49%
Manual workers	58%	54%	44%	39%
House persons	50%	56%	39%	28%
Unemployed	50%	48%	37%	37%
Retired	56%	55%	40%	19%
Students	59%	54%	47%	56%
Difficulties paying bills				
Most of the time	46%	45%	33%	35%
From time to time	52%	50%	40%	36%
Almost never	61%	56%	46%	38%

A majority of respondents in 23 Member States **trust radio.** The exceptions are Greece, as in autumn 2010 (36%, versus 61% 'distrust', =), and now also Italy (39%, -10 points, versus 42%, +3) and Malta (36%, -10, versus 49%, +13), where levels of trust have decreased significantly. Opinions are evenly divided in Hungary (47% 'trust', -4, versus 47% 'distrust', +8). Conversely, trust is particularly strong in Sweden (80%, +2), Finland (78%, +2), Slovakia (75%, -2) and Denmark (73%, +2).

QA10.2 I would like to ask you a question about how much trust you have in certain institutions. For each of the following institutions, please tell me if you tend to trust it or tend not to trust it.
Radio

	Tend to trust	Diff EB 76 Aut.2011- EB 74 Aut.2010	Tend not to trust	Diff EB 76 Aut.2011- EB 74 Aut.2010
EU27	57%	=	35%	=
SE	80%	+2	18%	=
FI	78%	+2	19%	-1
SK	75%	-2	22%	+1
DK	73%	+2	24%	-1
EE	71%	+3	24%	=
BE	70%	-3	28%	+3
CZ	70%	-1	25%	-1
NL	70%	-5	22%	+4
AT	68%	=	25%	-2
DE	66%	=	28%	+1
IE	64%	+1	32%	-1
LU	61%	=	32%	+1
FR	60%	+6	34%	-7
CY	58%	+1	39%	+2
LV	58%	=	33%	+1
LT	57%	=	35%	+2
PL	57%	=	35%	+4
RO	57%	+7	32%	-8
UK	54%	-1	39%	+1
PT	52%	-8	37%	+3
SI	52%	-3	45%	+3
BG	51%	=	30%	-3
ES	50%	+3	41%	-1
HU	47%	-4	47%	+8
IT	39%	-10	42%	+3
EL	36%	=	61%	=
MT	36%	-10	49%	+13
CY (tcc)	60%	+3	33%	-4
HR	44%	-4	49%	+4
TR	29%	+2	57%	-5
MK	31%	+1	48%	+4
IS	79%	+3	20%	=
ME	50%	-	38%	-

A majority of respondents in 22 Member States **trust television.** The exceptions are Greece (77% 'distrust', -1 point), Spain (55%, -1), France, despite a significant decrease in the level of distrust (53%, -8), Italy (49%, -3) and now Malta (49%, +10). In the countries where a majority of respondents trust television, levels vary between 76% in Finland (+5) and 52% in Luxembourg (stable), Hungary (-2) and Slovenia (-4).

QA10.3 I would like to ask you a question about how much trust you have in certain institutions. For each of the following institutions, please tell me if you tend to trust it or tend not to trust it.
Television

	Tend to trust	Diff EB 76 Aut.2011-EB 74 Aut.2010	Tend not to trust	Diff EB 76 Aut.2011-EB 74 Aut.2010
EU27	53%	+3	42%	-3
FI	76%	+5	22%	-4
BG	73%	+3	24%	-3
SE	73%	+3	25%	-2
BE	72%	+3	27%	-3
EE	72%	+4	26%	-2
AT	72%	+5	26%	-5
CZ	71%	=	27%	-1
SK	69%	+1	29%	-2
DK	68%	+2	30%	-1
NL	66%	+2	29%	-3
RO	61%	+7	36%	-7
IE	60%	+2	36%	-2
PT	60%	-5	35%	+3
DE	59%	+1	35%	-2
LV	59%	-3	38%	+4
PL	57%	+7	37%	-4
CY	56%	+1	43%	+1
LT	53%	+1	42%	-1
UK	53%	+2	43%	-2
LU	52%	=	44%	+1
HU	52%	-2	45%	+3
SI	52%	-4	46%	+4
FR	42%	+8	55%	-8
ES	41%	+1	55%	-1
MT	41%	-9	49%	+10
IT	40%	=	49%	-3
EL	22%	+1	77%	-1
CY (tcc)	61%	+6	36%	-5
HR	45%	-4	51%	+2
TR	35%	+1	59%	-3
MK	52%	-2	45%	+1
IS	77%	+7	21%	-4
ME	63%	-	35%	-

The press is trusted by a majority of respondents in only 13 Member States. Trust ratings for the press are the highest in Finland, where they have even risen (64%, +7 points), Slovakia (62%, +3) and Luxembourg (61%, also +7 points). Opinions are evenly divided in Cyprus (47%, +2), while distrust prevails in 13 countries, in particular in the United Kingdom (79%, =) and Greece (70%, -1). In terms of evolutions, Italy (34%, -6) and Malta (30%, -6) are again among the countries where trust has fallen the most sharply.

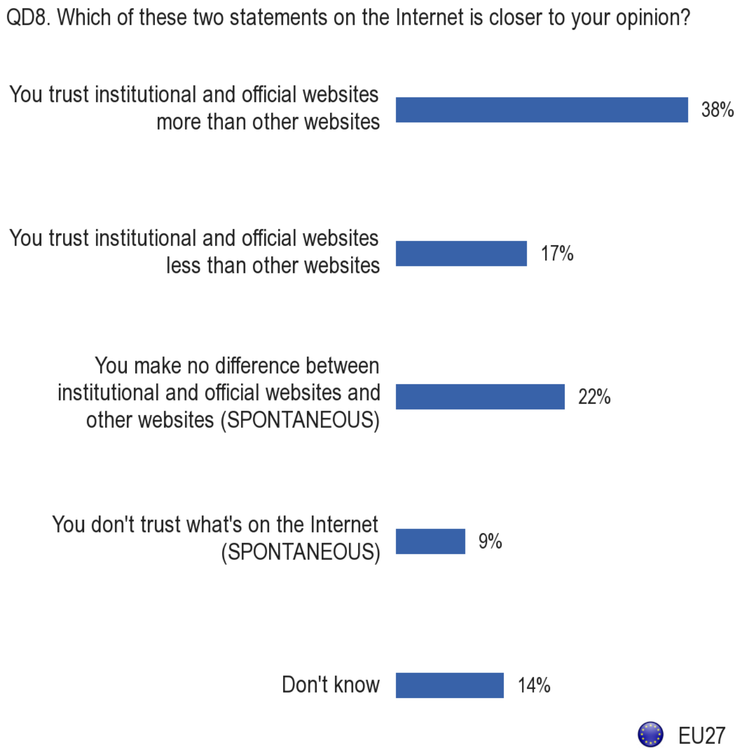
QA10.1 I would like to ask you a question about how much trust you have in certain institutions. For each of the following institutions, please tell me if you tend to trust it or tend not to trust it.
The press

	Tend to trust	Diff EB 76 Aut.2011-EB 74 Aut.2010	Tend not to trust	Diff EB 76 Aut.2011-EB 74 Aut.2010
EU27	43%	+1	51%	-1
FI	64%	+7	35%	-7
SK	62%	+3	36%	-3
LU	61%	+7	37%	-3
BE	60%	+1	38%	-1
NL	60%	-5	37%	+4
AT	59%	=	36%	-2
CZ	57%	-1	40%	=
EE	53%	+4	43%	-3
FR	51%	+3	43%	-5
DK	50%	+5	47%	-4
DE	50%	+1	45%	=
PT	49%	-5	40%	+2
CY	47%	+2	47%	=
RO	46%	+4	44%	-7
SE	45%	+3	54%	-2
PL	44%	+4	47%	=
IE	43%	+5	51%	-5
BG	42%	=	44%	-3
LT	42%	-1	52%	+2
ES	41%	+4	52%	-1
LV	40%	-2	55%	+4
SI	39%	=	58%	=
HU	37%	-2	57%	+5
IT	34%	-6	53%	+2
MT	30%	-6	52%	+8
EL	28%	+1	70%	-1
UK	18%	=	79%	=
CY (tcc)	59%	+7	38%	-6
HR	34%	-1	60%	=
TR	30%	+3	62%	-5
MK	34%	=	55%	+1
IS	53%	+6	45%	-4
ME	58%	-	39%	-

Trust in the Internet, though less pronounced, outweighs distrust in 18 Member States. It is particularly strong in the Czech Republic (61%, +6 points), Denmark (59%, +7), where more people trust the Internet than the press, and Slovakia (57%, =).
However, trust in the Internet is much lower in Germany (27%, -3), Portugal (29%, -5), France (33%, +4), Spain (34%, +4) and the United Kingdom (34%, +7).
In other striking evolutions since last year, trust in the Internet has increased in Poland (46%, +9), while declining in Malta (35%, -7).

QA10.4 I would like to ask you a question about how much trust you have in certain institutions. For each of the following institutions, please tell me if you tend to trust it or tend not to trust it.
The Internet

	Tend to trust	Diff EB 76 Aut.2011-EB 74 Aut.2010	Tend not to trust	Diff EB 76 Aut.2011-EB 74 Aut.2010
EU27	37%	+2	39%	-2
CZ	61%	+6	24%	-3
DK	59%	+7	27%	-4
SK	57%	=	27%	-1
NL	51%	=	35%	+1
EE	49%	+1	27%	+3
FI	49%	+3	35%	-1
PL	46%	+9	28%	-1
BE	44%	+2	42%	-4
SI	44%	+2	37%	=
LT	43%	+1	28%	+4
AT	43%	+3	39%	-3
EL	42%	+3	38%	-3
LV	42%	-2	35%	+6
HU	41%	=	32%	+8
BG	40%	+1	20%	+2
IE	38%	+2	41%	-1
IT	37%	-3	40%	=
LU	36%	+4	47%	-3
RO	36%	-1	30%	+4
CY	35%	+3	30%	-2
MT	35%	-7	33%	+8
SE	35%	+2	54%	=
ES	34%	+4	40%	=
UK	34%	+7	46%	-4
FR	33%	+4	46%	-3
PT	29%	-5	39%	+1
DE	27%	-3	43%	-3
CY (tcc)	45%	-5	46%	+13
HR	33%	-2	40%	+3
TR	24%	+1	55%	-5
MK	43%	+4	25%	+2
IS	39%	-8	51%	+10
ME	51%	-	23%	-



When asked to assess the **credibility of the various sources on the Internet**[57], a majority of Internet users "trust institutional and official websites more than other websites" (38%). In contrast just under a fifth of Europeans trust them less than other websites (17%).

However, almost a quarter of respondents spontaneously said that they make no difference between the two (22%).

The Member States where respondents are the most likely to trust institutional and official websites are Sweden (74%), Denmark (69%), the Netherlands (63%) and Finland (60%), which are among the countries where the use of the Internet is the most widespread.

Only one country has more trust in non-institutional websites, namely Greece (27%, versus 24% for institutional websites). But trust in "other websites" is also strong in Poland (29%) and France (24%).

[57] QD8 Which of these two statements on the Internet is closer to your opinion? You trust institutional and official websites more than other websites; You trust institutional and official websites less than other websites; You make no difference between institutional and official websites and other websites (SPONTANEOUS); You don't trust what's on the Internet (SPONTANEOUS); DK.

A socio-demographic analysis reveals that the most educated Europeans are far more likely to trust institutional and official websites: 45% of Europeans who studied up to the age of 20 or beyond trust them more than other sites, compared with only 24% of those who completed their studies before the age of 16. This does not mean that the latter are more inclined trust other websites (16%, versus 18% of the most educated respondents); they are more likely to say spontaneously that they do not trust what is on the Internet (18%, versus 6% of the most educated).

Europeans who use the Internet every day (43%) are also far more likely than less frequent users (26%) to believe in the credibility of institutional websites.

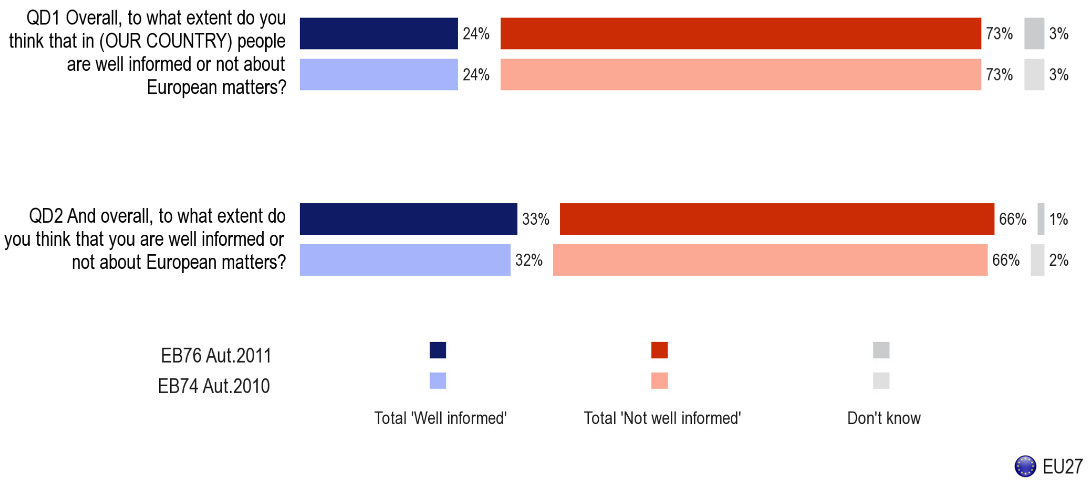
QD8 Which of these two statements on the Internet is closer to your opinion?

	You trust institutional and official websites more than other websites	You trust institutional and official websites less than other websites	You make no difference between institutional and official websites and other websites (SPONTANEOUS)	You don't trust what's on the Internet (SPONTANEOUS)	Don't know
EU27	38%	17%	22%	9%	14%
Age					
15-24	39%	18%	24%	6%	13%
25-39	38%	17%	24%	9%	12%
40-54	38%	16%	22%	10%	14%
55 +	37%	16%	19%	12%	16%
Education (End of)					
15-	24%	16%	20%	18%	22%
16-19	34%	16%	23%	11%	16%
20+	45%	18%	21%	6%	10%
Still studying	43%	16%	24%	6%	11%
Use of the Internet					
Everyday	43%	17%	23%	7%	10%
Often/ Sometimes	26%	15%	21%	16%	22%

2. *LEVELS OF INFORMATION ON EUROPEAN MATTERS*

- A clear majority of respondents still believe that they are ill-informed about European matters -

Europeans continue to believe that they are ill-informed about European issues: 73% consider that the public in their country is ill-informed (versus 24%) and 66% think that they are ill-informed themselves[58]. Only a third of Europeans therefore feel personally well-informed about European matters (in proportions almost identical to those recorded in the EB74 survey of autumn 2010).



The feeling of being well-informed on European matters - both nationally and personally - is the minority opinion in all Member States except Luxembourg. In the latter country opinions are evenly divided on how well-informed people are at national level, while a narrow majority of respondents feel that they are personally well-informed.

The four countries where respondents believe the level of information on European matters is worst, both nationally and personally, are Spain (82% consider that the public is ill-informed and 79% on a personal level), Greece (81%/71%), Cyprus (81%/76%) and France (79%/73%).

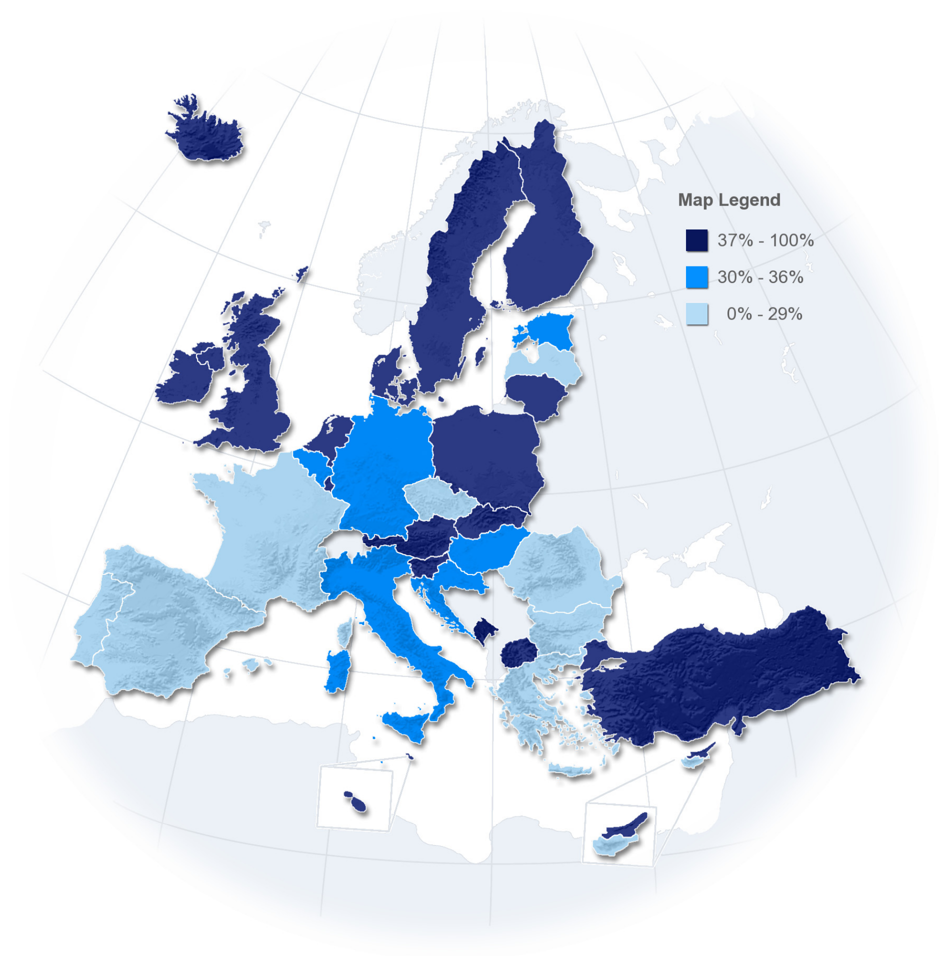
[58] QD1 Overall, to what extent do you think that in (OUR COUNTRY) people are well informed or not about European matters?/QD2 And overall, to what extent do you think that you are well informed or not about European matters?

The feeling that the population is well-informed about European matters has increased significantly in Lithuania (40%, +12); the feeling of being well-informed personally has also gained ground, albeit more modestly (39%, +6). In contrast, the feeling of being well-informed, both nationally and personally, has fallen sharply in Slovakia (32%, -13 and 38%, -12 from a personal point of view).

Question: QD2. And overall, to what extent do you think that you are well informed or not about European matters?

Answers: Total 'Well informed'

LU	52%
FI	47%
IE	46%
DK	44%
NL	41%
SI	41%
AT	41%
PL	41%
LT	39%
MT	39%
SK	38%
SE	37%
UK	37%
DE	36%
EE	34%
EU	33%
IT	32%
BE	32%
HU	30%
EL	29%
CZ	29%
PT	28%
RO	28%
BG	28%
LV	28%
FR	25%
CY	24%
ES	20%
CY (tcc)	37%
ME	46%
IS	44%
MK	43%
TR	41%
HR	35%



In the candidate countries, the feeling of being well-informed is also the minority opinion, but it has gained significant ground since last year: in Turkey (38% 'nationally', +13; 41% personally, +8), in the Former Yugoslav Republic of Macedonia (43%, +11 and 43%, +5), and in Iceland (26%, +4 and 44%, +10). 35% of respondents in Croatia (-3) and 46% in Montenegro, polled for the first time, consider that they are well-informed personally: overall, therefore, this feeling is more widely held in the candidate countries than in the Member States on average.

A socio-demographic analysis reveals that the feeling of being personally well-informed about European matters is more widespread:

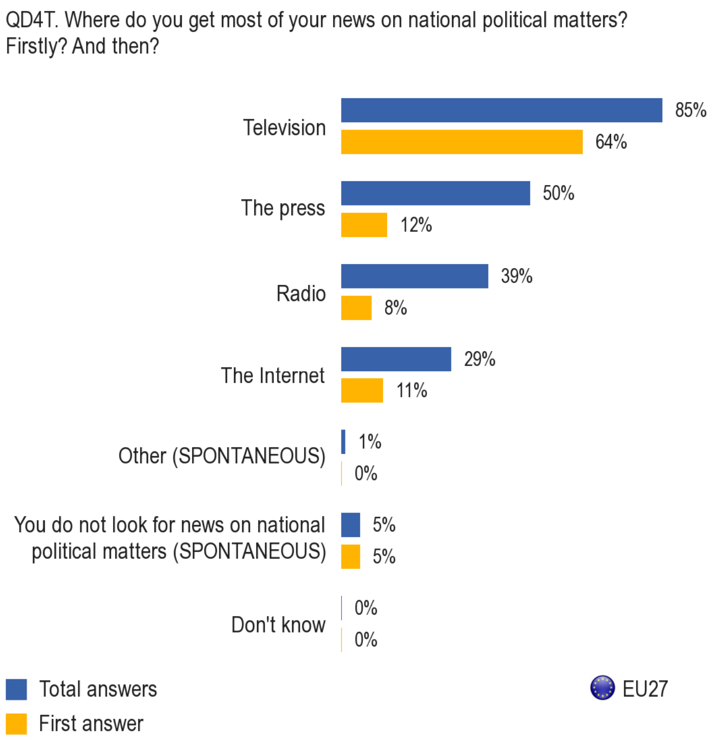
- among men (39%) than women (27%);
- among the most educated Europeans (45% of those who studied until the age of 20 or beyond) than among those who left school before the age of 16 (21%);
- among managers (50%, versus 37% of white-collar workers, 28% of manual workers and 26% of unemployed people) and those who place themselves at the top of the social scale (44%, versus 20% of those at the bottom);
- among Europeans for whom the EU's image is positive (48%, compared with 26% of those for whom the EU has a negative image).

QD2 And overall, to what extent do you think that you are well informed or not about European matters?

	Total 'Well informed'	Total 'Not well informed'	Don't know
EU27	33%	66%	1%
Gender			
Male	39%	60%	1%
Female	27%	72%	1%
Age			
15-24	31%	67%	2%
25-39	34%	65%	1%
40-54	34%	65%	1%
55 +	33%	66%	1%
Education (End of)			
15-	21%	78%	1%
16-19	31%	68%	1%
20+	45%	54%	1%
Still studying	35%	63%	2%
Respondent occupation scale			
Self- employed	41%	58%	1%
Managers	50%	49%	1%
Other white collars	37%	62%	1%
Manual workers	28%	71%	1%
House persons	20%	78%	2%
Unemployed	26%	73%	1%
Retired	32%	67%	1%
Students	35%	63%	2%
Self-positioning on the social scale			
Low (1-4)	20%	79%	1%
Medium (5-6)	33%	66%	1%
High (7-10)	44%	55%	1%
Image de l'UE			
Positive	48%	51%	1%
Neutral	27%	72%	1%
Négative	26%	73%	1%

3. SOURCES OF INFORMATION FOR POLITICAL MATTERS AND THE EUROPEAN UNION

3.1 National political matters



To get news on national political matters, Europeans rely primarily on television (total score of 85%), followed by the press (50%), radio (39%) and the Internet (29%).

If we focus on the "first" source of information, television is still by far the main source (64%), but there is a narrower gap between the press (12%) and the Internet (11%), which has now overtaken radio (8%)[59].

Television is by far the main source of information on national political matters in all the Member States, apart from Luxembourg, where respondents primarily rely on the press for information on national political matters (66%, versus 58% for television).

The press recorded high scores in Sweden (74%), Finland (71%), Austria (70%), Germany (66%) and Luxembourg (66%), compared with an EU average of 50%.

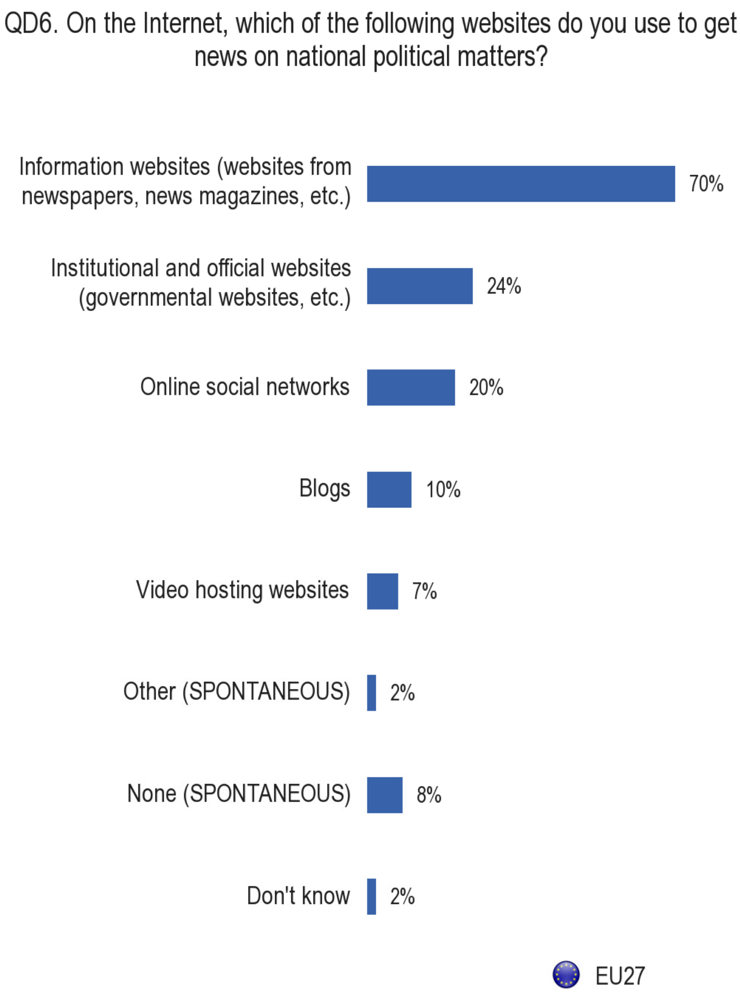
Respondents in Ireland mentioned the radio more frequently than Europeans on average (60%, versus a European average of 39%). That is also the case in Austria (55%), Slovakia (53%), Estonia (52%), Cyprus (52%) and Belgium (51%).

Finally, the Internet obtained its highest scores in Latvia (53%, second most important source after television, compared with a European average of 29%) and Estonia (51%).

When we focus only on the first answer, television tops the list in all EU countries, except Luxembourg, where it is surpassed by the press (33%, versus 30% for television).

[59] QD4 Where do you get most of your news on national political matters? Firstly? And then?

In one candidate country, Iceland, the Internet is the main source of information on national political matters (37%, versus 34% for television). In the other candidate countries, more than seven out of ten respondents mentioned television.



Base = respondents who use the Internet as a source of information on national political matters

]

For the Europeans who use the Internet to get information on national political matters, information websites are by far the preferred source of information (70%). Respondents also mentioned institutional websites (24%) and online social networks (20%). Blogs scored 10%, ahead of video hosting websites (7%)[60].

Online social networks were mentioned the most frequently by respondents in Bulgaria (42%) and Greece (41%). Respondents in Greece are also more likely to mention blogs (37%) in a context where this is the only country that trusts institutional and official websites less than other sites[61]. The scores for blogs were also above the European average in Slovenia (25%), Slovakia (22%) and Lithuania (22%). Video hosting websites were also more frequently mentioned in Slovakia (18%), Slovenia and

A socio-demographic analysis shows that online social networks are ranked in second place by young people (29% of those aged 15 to 24), students (28%), the least educated respondents (22% of those who left school before the age of 16) and unemployed people (25%). This is also the case of those who place themselves at the bottom of the social scale (23%), or who struggle to pay their bills most of the time (27%). The oldest respondents, the most educated, managers, those who place themselves at the top of the social scale and those who almost never have difficulties paying their bills prefer institutional and official websites after information websites.

[60] QD6 On the Internet, which of the following websites do you use to get news on national political matters?
[61] See the analysis of QD8 in part 1.2: trust in the media.

QD6 On the Internet, which of the following websites do you use to get news on national political matters?

	Information websites (websites from newspapers, news magazines, etc.)	Institutional and official websites (governmental websites, etc.)	Online social networks	Blogs	Video hosting websites	Other (SPONTANEOUS)	None (SPONTANEOUS)	Don't know
EU27	70%	24%	20%	10%	7%	2%	8%	2%
Gender								
Male	73%	24%	20%	11%	8%	2%	6%	2%
Female	66%	23%	21%	8%	5%	3%	9%	3%
Age								
15-24	66%	20%	29%	10%	10%	2%	7%	2%
25-39	71%	24%	20%	10%	7%	3%	8%	2%
40-54	73%	25%	15%	10%	5%	2%	7%	2%
55 +	67%	27%	13%	7%	6%	3%	10%	2%
Education (End of)								
15-	51%	12%	22%	9%	5%	2%	15%	4%
16-19	63%	20%	20%	9%	7%	3%	9%	3%
20+	78%	29%	16%	10%	6%	2%	6%	1%
Still studying	71%	23%	28%	11%	9%	2%	6%	2%
Respondent occupation scale								
Self- employed	76%	24%	19%	14%	8%	1%	6%	1%
Managers	80%	34%	16%	9%	5%	1%	5%	1%
Other white collars	71%	23%	18%	9%	6%	3%	7%	2%
Manual workers	64%	20%	20%	8%	7%	3%	9%	4%
House persons	56%	14%	18%	12%	4%	8%	12%	5%
Unemployed	63%	19%	25%	8%	8%	2%	10%	2%
Retired	67%	26%	13%	8%	6%	3%	10%	3%
Students	71%	23%	28%	11%	9%	2%	6%	2%
Difficulties paying bills								
Most of the time	62%	16%	27%	13%	9%	2%	9%	4%
From time to time	62%	23%	23%	11%	9%	3%	8%	3%
Almost never	75%	25%	18%	8%	6%	2%	7%	1%
Self-positioning on the social scale								
Low (1-4)	66%	19%	23%	10%	8%	2%	8%	2%
Medium (5-6)	69%	22%	19%	9%	7%	3%	8%	2%
High (7-10)	72%	27%	20%	10%	7%	2%	7%	2%

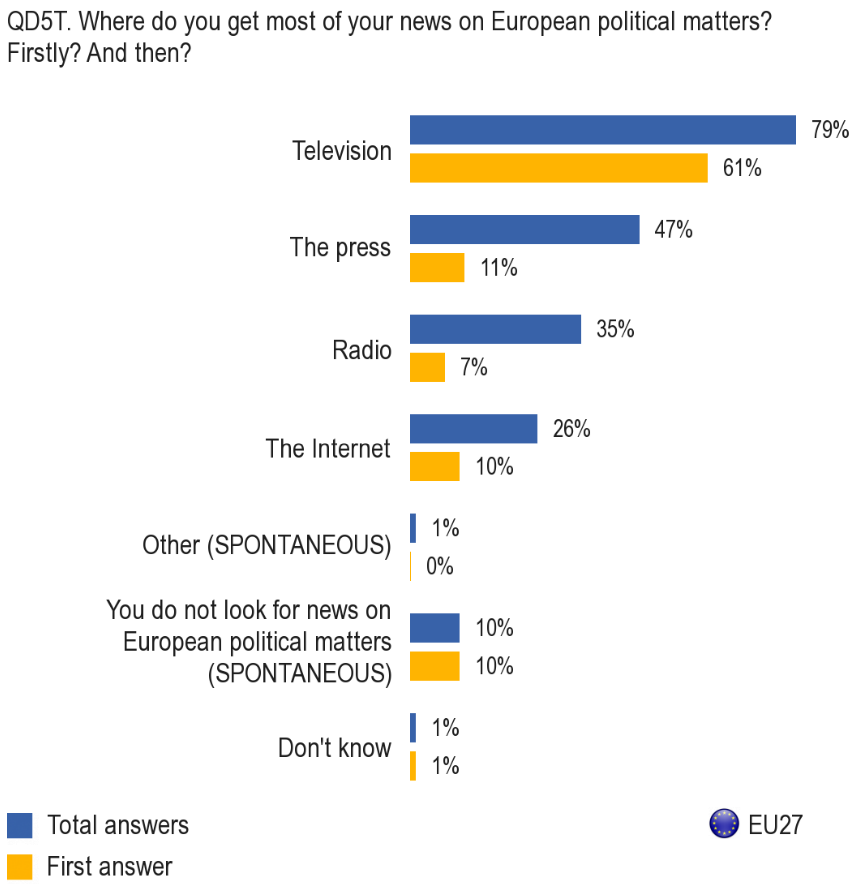
Opinion leaders[62] are more likely to mention institutional websites (34%, compared with 24% of all Europeans who use the Internet to get information on national political matters).

Finally, and unsurprisingly, the people who trust official and institutional websites more than other sites are more likely to use them to get information on national political matters (31%, compared with 20% of those who tend to trust institutional websites less than other websites).

[62] For the definition of opinion leadership, see the first volume, "Public opinion in the European Union", of the Standard Eurobarometer, part 3.1: Interest in politics.

3.2 European political matters

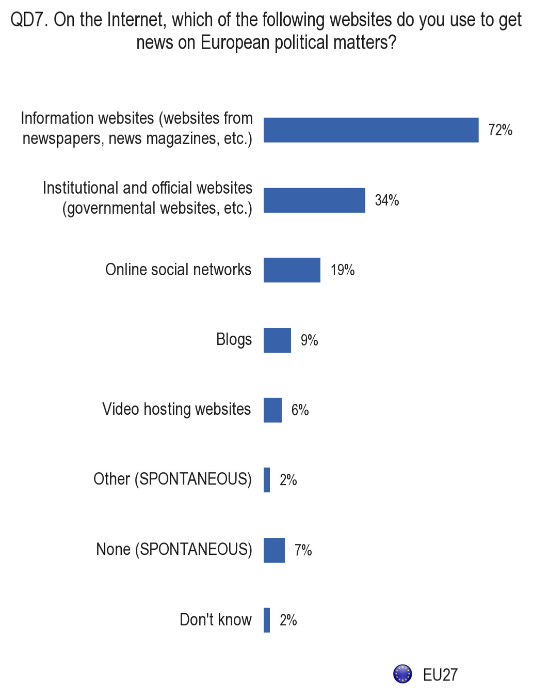
Europeans primarily rely on television to get information on European political matters (total score of 79%). The next highest scores were obtained by the press (47%), radio (35%) and the Internet (26%). The ranking is therefore the same as for national political matters, though with lower scores.



When we focus on the "first" source of information mentioned, television continues to head the list (61%), but there is a narrower gap between the press (11%) and the Internet (10%), which moves ahead of radio (7%)[63]. These results have remained stable since EB74 in autumn 2010.

[63] QD5 Where do you get most of your news on European political matters? Firstly? And then?

When we asked the Europeans who use the Internet to get information on European political matters (26% of the total sample) which websites they use, information websites were by far the most frequently mentioned source (72%). Institutional and official websites were mentioned more frequently than for national matters (34%, versus 24%). The scores obtained by online social networks (19%), blogs (9%) and video hosting websites (6%) are in line with those recorded at national level.



Base = those who use the Internet to get information on European political matters: 26% of the total sample

3.3 The European Union

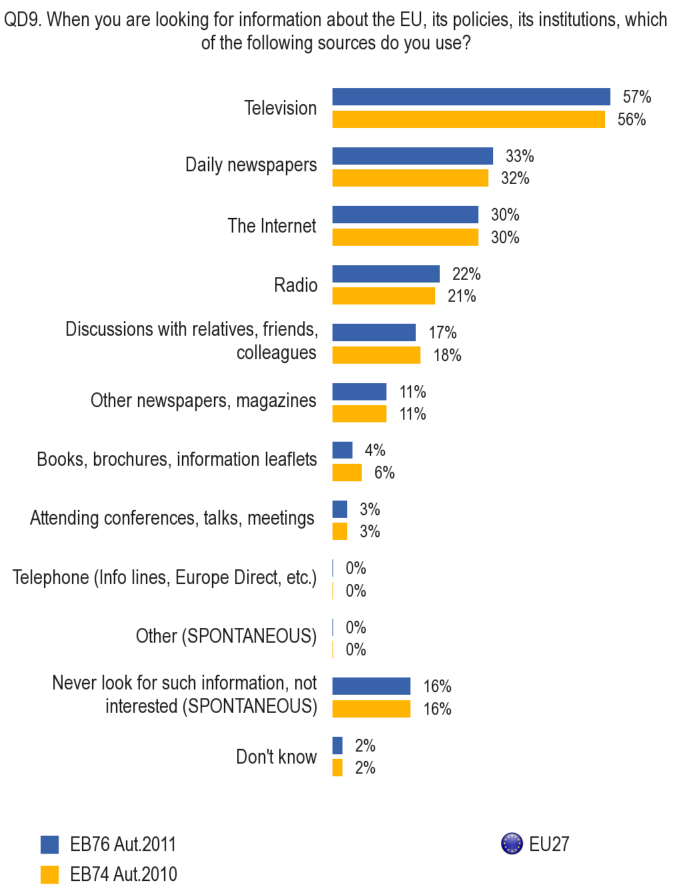
The sources preferred by Europeans when actively searching for information on the European Union, its policies and institutions, have remained unchanged since the Eurobarometer survey of autumn 2010 (EB74). Television remains top of the list (57%), followed by the daily press (33%) and the Internet (30%). Radio is ranked fourth (22%), ahead of discussions with relatives, friends and colleagues (17%). In contrast to the questions on the main sources of information for national and European political matters, radio lags behind the Internet this time. This can be explained by the active dimension of the information search in this question. Other newspapers and magazines are used less frequently (11%). Dedicated media such as books, brochures, information leaflets (4%) and conferences (3%) remain very marginal sources[64].

[64] QD9 When you are looking for information about the EU, its policies, its institutions, which of the following sources do you use? (MULTIPLE ANSWERS POSSIBLE)

Television was the most frequently mentioned medium in 24 of the 27 Member States. The Internet topped the list in the three remaining countries: Sweden (64%, +12 points), the Netherlands (55%, +4) and Estonia (50%, +1). In Finland, television and the Internet share first place (55% each), in a context where the Internet has slipped slightly (-1) while television has gained significant ground (+9).

Daily newspapers are widely mentioned as a source of information on the European Union in Austria (59%, =), Germany (52%, +5) and Luxembourg (50%, +5).

Respondents in Ireland (41%, +8), Austria (40%, +5) and Slovakia (36%, =) are the most likely to use radio. But radio use has also increased in Cyprus (31%, +7) and Finland (24%, +7) since autumn 2010.



QD9 When you are looking for information about the EU, its policies, its institutions, which of the following sources do you use?

	Television	Diff. EB76 Aut.2011-EB74 Aut. 2010	Daily newspapers	Diff. EB76 Aut.2011- EB74 Aut. 2010	The Internet	Diff. EB76 Aut.2011-EB74 Aut. 2010	Radio	Diff. EB76 Aut.2011-EB74 Aut. 2010
EU27	57%	+1	33%	+1	30%	=	22%	+1
BE	62%	+4	37%	+4	36%	-2	29%	+3
BG	69%	+5	29%	-1	23%	-2	20%	+3
CZ	57%	-2	35%	-2	33%	+2	20%	-5
DK	63%	=	36%	+1	56%	+4	25%	-3
DE	62%	+4	52%	+5	31%	-5	29%	+4
EE	43%	-4	22%	=	50%	+1	24%	-3
IE	59%	+13	32%	+3	22%	-4	41%	+8
EL	65%	+2	22%	=	28%	+6	16%	-2
ES	56%	-3	27%	-1	24%	-2	23%	=
FR	57%	+2	29%	-2	34%	-1	27%	+2
IT	54%	-2	31%	-2	16%	=	8%	=
CY	67%	+10	30%	=	21%	-1	31%	+7
LV	50%	-3	16%	+1	47%	+3	23%	+3
LT	53%	+8	16%	-1	37%	+2	20%	+4
LU	52%	+1	50%	+5	44%	+5	32%	+2
HU	56%	-7	25%	+5	23%	-3	20%	+1
MT	47%	-2	17%	-5	27%	=	14%	-3
NL	54%	+5	46%	+1	55%	+4	23%	+5
AT	62%	=	59%	=	23%	-4	40%	+5
PL	53%	-2	13%	-3	28%	-3	15%	-4
PT	55%	-4	23%	-5	13%	=	11%	-6
RO	64%	+9	15%	+2	20%	-3	24%	+3
SI	55%	+4	30%	+4	45%	+4	26%	+3
SK	71%	-1	38%	+2	39%	+3	36%	=
FI	55%	+9	46%	+4	55%	-1	24%	+7
SE	48%	+3	46%	+3	64%	+12	24%	+3
UK	53%	+4	32%	+2	35%	+6	23%	+3
CY (tcc)	58%	+5	50%	+16	21%	-2	20%	+5
HR	63%	+11	33%	+9	32%	+5	20%	+6
TR	53%	-7	28%	+5	15%	-2	5%	-7
MK	63%	+8	19%	-3	27%	+4	8%	=
IS	45%	+7	43%	+7	62%	-1	32%	+7
ME	55%	-	42%	-	22%	-	12%	-

First four items mentioned

Respondents in Greece are slightly more likely to mention conferences, discussions and meetings (10%, compared with an EU average of 3%). Books, brochures and information leaflets tend to be more frequently consulted in Sweden (17%, versus 4% in the EU), Luxembourg (11%), Finland (10%) and Denmark (10%).

A socio-demographic analysis reveals that:

- for young people and students, the Internet is the main source when searching for information on the EU (48% of those aged 15 to 24 and 55% among students), whereas television tops the list for all the other age groups;
- the most educated respondents also mentioned the Internet more frequently than Europeans on average (48%), but nevertheless mainly rely on television (55%);
- managers prefer the Internet (55%), just ahead of television (53%);
- respondents who consider that they are well-informed about European issues rely on television (63%) but they are also more likely than Europeans as a whole to mention all the proposed sources, in particular daily newspapers (44%), the Internet (41%) and radio (28%).

QD9 When you are looking for information about the EU, its policies, its institutions, which of the following sources do you use?

	Television	Daily newspapers	Internet	Radio
EU27	57%	33%	30%	22%
Gender				
Male	57%	35%	34%	24%
Female	57%	30%	26%	21%
Age				
15-24	45%	21%	48%	12%
25-39	54%	31%	42%	20%
40-54	57%	34%	31%	25%
55 +	64%	37%	13%	26%
Education (End of)				
15-	60%	26%	6%	18%
16-19	60%	33%	26%	23%
20+	55%	40%	48%	28%
Still studying	44%	24%	55%	12%
Respondent occupation scale				
Self- employed	54%	39%	36%	24%
Managers	53%	43%	55%	30%
Other white collars	54%	34%	41%	20%
Manual workers	56%	31%	28%	23%
House persons	62%	24%	16%	19%
Unemployed	58%	22%	28%	17%
Retired	65%	36%	11%	26%
Students	44%	24%	55%	12%
Information on European matters				
Well informed	63%	44%	41%	28%
Not well informed	55%	27%	25%	19%

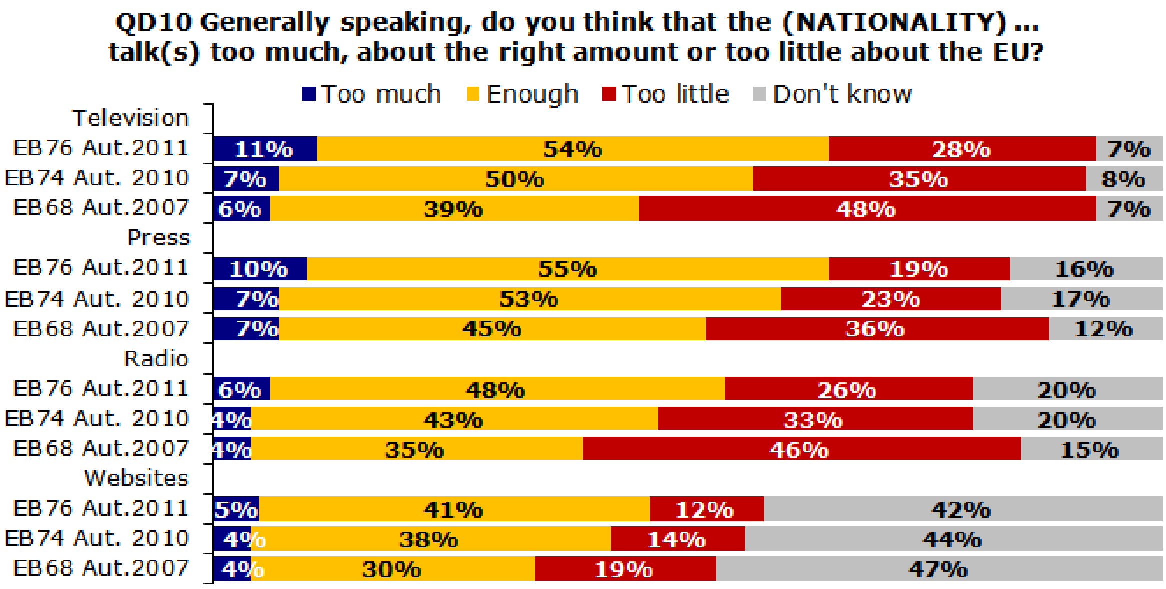
First four items mentioned

3.4 Media coverage of the European Union

- The impression that national media do not give enough coverage to the European Union has declined -

Although a majority of Europeans say that they are ill-informed about the European Union, they do not blame their national media for failing to give it sufficient coverage. A majority, larger than at the time of the autumn 2010 Eurobarometer (EB74), consider that media coverage is adequate, whether it involves television (54%, +4 points), the press (55%, +2), radio (48%, +5) or websites (41%, +3). The impression that there is "too little" talk about the EU is therefore the minority opinion and has lost ground for all the media reviewed. However the feeling that national media talk "too much" about the European Union has also gained ground: 11%, +4 for television, 10%, +3 for the press, 6%, +2 for radio, and 5%, +1 for websites[65].

For the record, at the time of EB68 in autumn 2007[66] a majority of Europeans considered that national television and radio did not give enough coverage to the European Union. The trend has therefore been reversed for these two media.



Respondents in Greece and Spain are the most likely to consider that national television (34% and 18% respectively), the press (21% and 20%) and radio (13% and 18%) talk too much about the European Union.

The following countries are instead more likely to criticise the lack of information about the European Union in these three media: France (television, 43%; press, 27%; radio, 37%) and Denmark (television, 41%; press, 31%; radio, 34%), together with Sweden for the press (33%) and radio (34%).

---

[65] QD10 Generally speaking, do you think that the (NATIONALITY) ... talk(s) too much, about the right amount or too little about the EU? 1. Television 2. Press 3. Radio 4. Websites

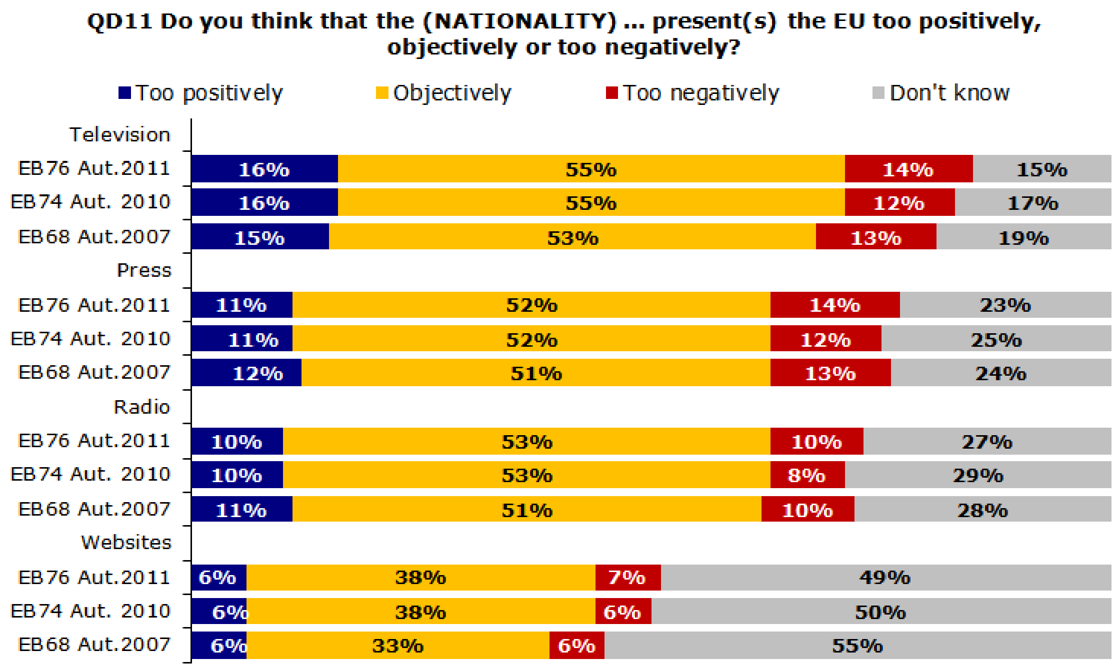
[66] http://ec.europa.eu/public_opinion/archives/eb/eb68/eb_68_en.pdf

In the candidate countries, respondents in Turkey (television, 36%; press, 17%; radio, 13%), the Former Yugoslav Republic of Macedonia (television, 44%; press, 26%; radio, 16%) and Montenegro (television, 31%; press, 26%; radio, 15%) are more likely to think that the media talk too much about the European Union, compared with the European averages (television, 11%; press, 10%; radio, 6%). Conversely, in Iceland (television, 42%; press, 30%; radio, 37%) and Croatia (television, 45%; press, 42%; radio, 45%) the predominant feeling is that the media do not talk enough about the EU.

A socio-demographic analysis reveals that the most educated Europeans and those with a strong interest in politics are more likely to say that there is a lack of information about the European Union in the media. However, a majority of respondents in all categories feel that national media give sufficient coverage to the European Union.

- The various media are thought to be objective in their coverage of the European Union -

A majority of Europeans, unchanged since the autumn 2010 Eurobarometer, consider that **the media present the European Union objectively:** 55% for television, 52% for the press and 53% for radio. While representing a large majority of the people who answered the question, the Internet score is lower (38%), but this must be seen against the backdrop of a very high 'DK' rate for this medium (49%)[67].

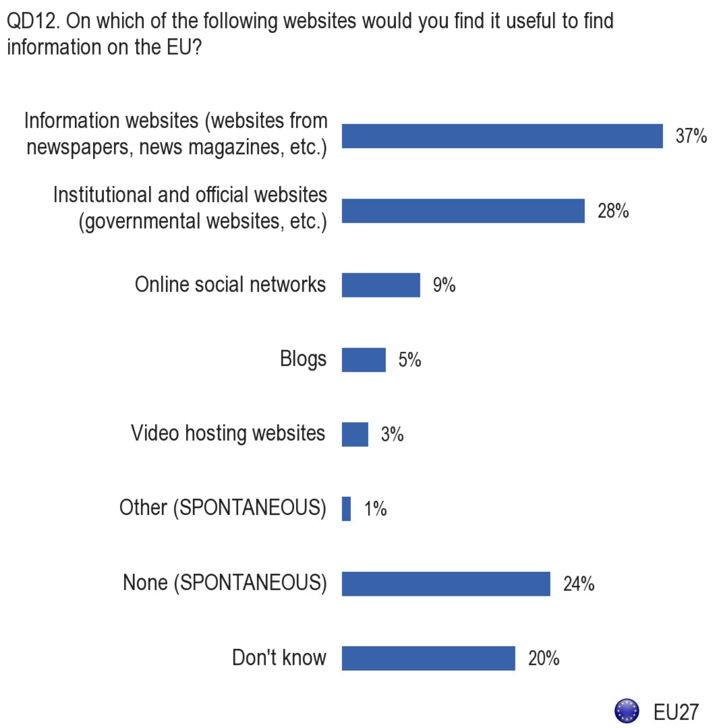


The proportions of Europeans who consider that their national media are too positive about the European Union remain stable: 16% for television, 11% for the press, 10% for radio and 6% for websites.

[67] QD11 Do you think that the (NATIONALITY) ... present(s) the EU too positively, objectively or too negatively?

However the feeling that the media are too negative in their coverage of the European Union has increased very slightly: 14%, +2 for television; 14%, +2 for the press; 10%, +2 for radio; and 7%, +1 for websites.

Respondents in Greece are more likely than Europeans on average to complain that national media – television, radio and press – present the European Union both too positively and too negatively. Therefore, they seem critical primarily of the lack of objectivity of the national media. Almost a third of respondents in the United Kingdom said the same of the press (32%).



We then asked all Europeans which were the websites where it would be the most useful to find information on the European Union: in a context where information websites are the sites most consulted by European Internet users to obtain information on national and European political matters, these are also the sites where respondents say it would be most useful to find information on the European Union (37%). But institutional and official websites are also seen as appropriate platforms (28%).

Only 9% of respondents mentioned online social networks as a useful source of information on the European Union, ahead of blogs (5%) and video hosting websites (3%)[68]. Finally, almost a quarter of respondents spontaneously answered "none" (24%).

Young people and students, who are the most frequent users of online social networks, are the most likely to consider that it would be useful to find information on the EU on such networks (18% and 20%). But they are also far more likely to mention institutional and official websites (38% and 42%) and information websites (50% and 56%).

[68] QD12 On which of the following websites would you find it useful to find information on the EU? (MULTIPLE ANSWERS POSSIBLE)

The most educated respondents, who, as we have seen, are more likely to trust institutional and official websites, are also more likely to mention these as appropriate platforms for information on the European Union (43%), but they too place information websites at the top of the list (53%).

QD12 On which of the following websites would you find it useful to find information on the EU?

	Information websites (websites from newspapers, news magazines, etc.)	Des sites institutionnels ou officiels (sites gouverne-mentaux, etc.)	Online social networks	Blogs	Video hosting websites	Other (SPONTANEOUS)	None (SPONTANEOUS)	Don't know
EU27	37%	28%	9%	5%	3%	1%	24%	20%
Gender								
Male	40%	29%	10%	6%	4%	1%	23%	18%
Female	34%	27%	9%	3%	3%	1%	25%	21%
Age								
15-24	50%	38%	18%	7%	7%	0%	12%	10%
25-39	49%	36%	13%	6%	5%	1%	15%	12%
40-54	40%	32%	8%	5%	3%	2%	21%	17%
55 +	20%	16%	4%	2%	1%	1%	37%	31%
Education (End of)								
15-	13%	10%	4%	1%	1%	1%	42%	35%
16-19	35%	26%	9%	5%	3%	1%	25%	20%
20+	53%	43%	10%	6%	4%	1%	13%	10%
Still studying	56%	42%	20%	8%	7%	0%	9%	8%

4. SOCIAL NETWORKS

- The belief that social networks offer an appropriate means of discussing politics has gained considerable ground in European public opinion -

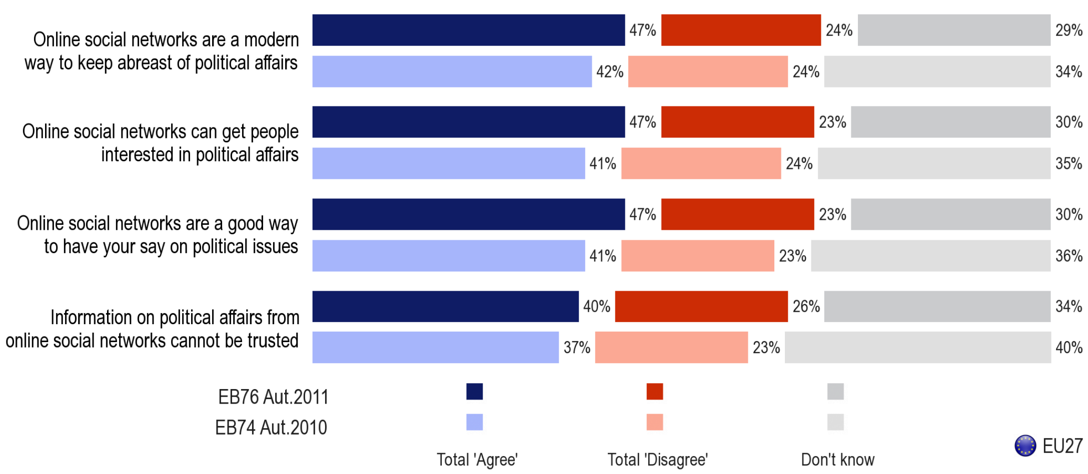
As we have seen, more than a third of Europeans use social networks at least once a week (35%). However, a larger proportion of Europeans (44%) never uses them. It is therefore hardly surprising that this question testing respondents' views of social networks irrespective of whether they use them generated a high number of 'DK' answers (between 29% and 34%). Nevertheless, respondents are now more likely to express an opinion, and 'DK' rates have fallen by between five and six points since autumn 2010.

In any event, whether or not Europeans use social networks, their judgments of them are now more favourable in several areas[69]:

- social networks are more often seen as a **modern way to keep abreast of political affairs** (47% 'agree', +5 points, versus 24% 'disagree', =)
- they are more often perceived as a **good way of getting people interested in political affairs** (47%, +6, versus 23%, -1)
- they are more often seen as a **good way to have your say on political issues** (47%, +6, versus 23%, =)

A slightly increased majority of respondents are still unconvinced of the **reliability of the information on political matters found on social networks**: 40% (+3) think that it cannot be trusted. However, the percentage of Europeans who take the opposite view has also increased, while remaining a minority (26%, +3).

QD13. Regardless of wether you participate in online social networks or not (social networking websites, blogs, video hosting websites), please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree with each of the following statements.



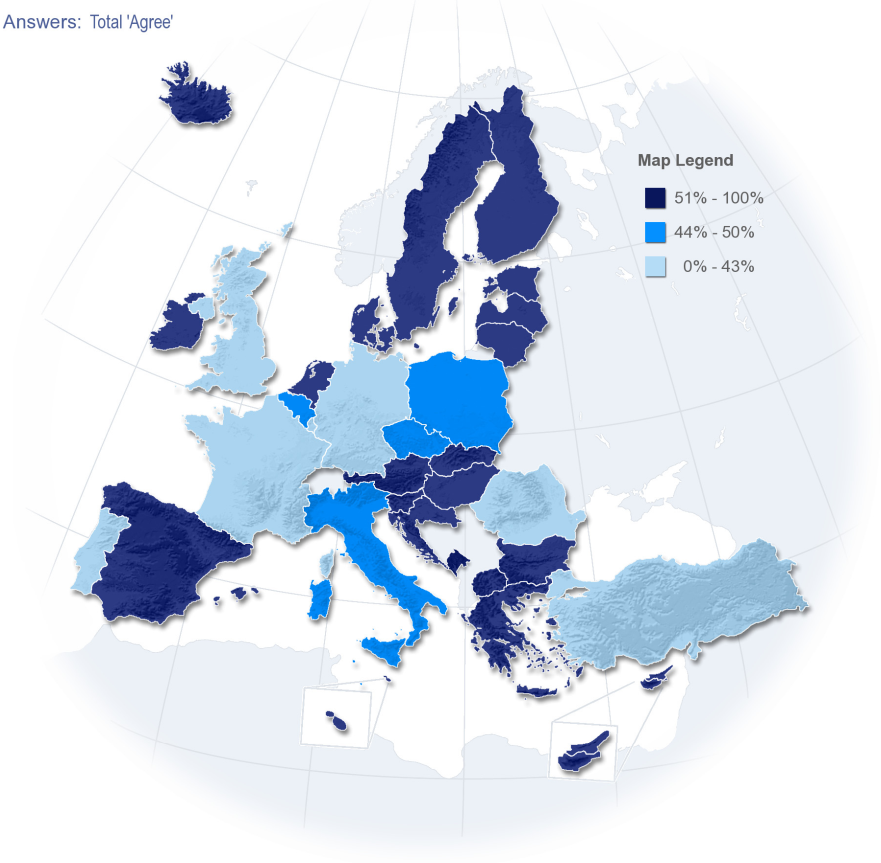
[69] QD13 Regardless of whether you participate in online social networks or not (social networking websites, blogs, video hosting websites), please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree with each of the following statements.

Question: QD13.1. Regardless of wether you participate in online social networks or not (social networking websites, blogs, video hosting websites), please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree with each of the following statements.

Option: Online social networks are a modern way to keep abreast of political affairs

Answers: Total 'Agree'

LV	66%
EL	66%
SK	66%
SI	66%
SE	65%
DK	62%
MT	58%
BG	57%
NL	56%
CY	56%
ES	55%
IE	55%
FI	54%
EE	54%
HU	54%
AT	53%
LT	52%
PL	49%
IT	48%
EU	47%
CZ	46%
BE	46%
LU	43%
UK	43%
FR	42%
DE	41%
PT	37%
RO	29%
CY (tcc)	62%
IS	72%
ME	67%
MK	58%
HR	58%
TR	41%



Regular users of social networks are more likely to welcome their utility in the political sphere (72% as a way for the public to have their say, 70% as a way of getting people interested in politics and 69% as a way of keeping abreast of political matters), but they are also more likely to stress the unreliability of the information found there (53%).

The answers to these questions reveal significant divisions. Young people are far more likely to emphasise the benefits of social networks: for example, 64% of those aged 15 to 24 consider that they are a good way of keeping abreast of political matters (compared with 31% of those aged 55 or over) and 66% see them as a good way for the public to have their say on political issues (compared with 29% of the 55+ group). The most educated respondents are also more likely to recognise the contribution of social networking on the political front.

But, as we have seen, young people and the most educated respondents, because they are more likely to use social networks, are also more likely to draw attention to the unreliable nature of the information they publish (50% of those aged 15 to 24 and 52% of the most educated respondents).
Whether in respect of the contribution made by social networks or the reliability of the information they contain, the oldest and least educated respondents are not more critical; they simply tend to express no opinion, because they do not use social networks.

ANNEXES

TECHNICAL SPECIFICATIONS

EUROBAROMETER 76.3

Public opinion in the European Union

TECHNICAL SPECIFICATIONS

Between the 5th of November and the 20th of November 2011, TNS Opinion & Social, a consortium created between TNS plc and TNS opinion, carried out the wave 76.3 of the EUROBAROMETER, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, "Research and Speechwriting".

The EUROBAROMETER 76.3 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 EUROBAROMETER 76.3 has also been conducted in the five candidate countries (Croatia, Turkey, the Former Yugoslav Republic of Macedonia, Iceland and Montenegro) 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.

ABBREVIATIONS	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+
BE	Belgium	TNS Dimarso	1.028	05/11/2011	20/11/2011	8.939.546
BG	Bulgaria	TNS BBSS	1.003	05/11/2011	14/11/2011	6.537.510
CZ	Czech Rep.	TNS Aisa	1.002	05/11/2011	20/11/2011	9.012.443
DK	Denmark	TNS Gallup DK	1.009	05/11/2011	20/11/2011	4.561.264
DE	Germany	TNS Infratest	1.538	05/11/2011	20/11/2011	64.409.146
EE	Estonia	Emor	1.003	05/11/2011	20/11/2011	945.733
IE	Ireland	Ipsos MRBI	1.015	05/11/2011	18/11/2011	3.522.000
EL	Greece	TNS ICAP	1.000	05/11/2011	18/11/2011	8.693.566
ES	Spain	TNS Demoscopia	1.004	05/11/2011	20/11/2011	39.035.867
FR	France	TNS Sofres	1.031	05/11/2011	20/11/2011	47.756.439
IT	Italy	TNS Infratest	1.031	07/11/2011	20/11/2011	51.862.391
CY	Rep. of Cyprus	Synovate	504	05/11/2011	20/11/2011	660.400
LV	Latvia	TNS Latvia	1.009	05/11/2011	20/11/2011	1.447.866
LT	Lithuania	TNS Gallup Lithuania	1.026	05/11/2011	20/11/2011	2.829.740
LU	Luxembourg	TNS ILReS	498	05/11/2011	20/11/2011	404.907
HU	Hungary	TNS Hungary	1.021	05/11/2011	20/11/2011	8.320.614
MT	Malta	MISCO	500	05/11/2011	20/11/2011	335.476
NL	Netherlands	TNS NIPO	1.005	05/11/2011	20/11/2011	13.371.980
AT	Austria	Österreichisches Gallup-Institut	1.001	05/11/2011	20/11/2011	7.009.827
PL	Poland	TNS OBOP	1.000	05/11/2011	20/11/2011	32.413.735
PT	Portugal	TNS EUROTESTE	1.002	05/11/2011	20/11/2011	8.080.915
RO	Romania	TNS CSOP	1.011	05/11/2011	20/11/2011	18.246.731
SI	Slovenia	RM PLUS	1.017	05/11/2011	19/11/2011	1.759.701
SK	Slovakia	TNS Slovakia	1.000	05/11/2011	20/11/2011	4.549.955
FI	Finland	TNS Gallup Oy	1.002	05/11/2011	20/11/2011	4.440.004
SE	Sweden	TNS GALLUP	1.022	05/11/2011	20/11/2011	7.791.240
UK	United Kingdom	TNS UK	1.312	05/11/2011	20/11/2011	51.848.010
TOTAL EU27			**26.594**	**05/11/2011**	**20/11/2011**	**408.787.006**
CY(tcc)	Turkish Cypriot Community	Kadem	500	05/11/2011	16/11/2011	143.226
HR	Croatia	Puls	1.000	05/11/2011	20/11/2011	3.749.400
TR	Turkey	TNS PIAR	1.001	05/11/2011	20/11/2011	54.844.406
MK	Former Yugoslav Rep. of Macedonia	TNS Brima	1.056	05/11/2011	12/11/2011	1.678.404
IS	Iceland	Capacent	500	05/11/2011	20/11/2011	252.277
ME	Montenegro	TNS Medium Gallup	1.008	05/11/2011	20/11/2011	492.265
TOTAL			**31.659**	**05/11/2011**	**20/11/2011**	**469.946.984**

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 above.

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:

Observed percentages	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Confidence limits	± 1.9 points	± 2.5 points	± 2.7 points	± 3.0 points	± 3.1 points

QUESTIONNAIRE

A. CORE QUESTIONNAIRE

ASK ALL

QA1 On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the life you lead?

(ONE ANSWER ONLY)

Very satisfied	1
Fairly satisfied	2
Not very satisfied	3
Not at all satisfied	4
DK	5

EB75.3 QA1

QA2 When you get together with friends or relatives, would you say you discuss frequently, occasionally or never about...?

(ONE ANSWER PER LINE)

	(READ OUT)	Frequently	Occasio-nally	Never	DK
1	National political matters	1	2	3	4
2	European political matters	1	2	3	4
3	Local political matters	1	2	3	4

EB75.3 QA2

QA3 When you hold a strong opinion, do you ever find yourself persuading your friends, relatives or fellow workers to share your views? Does this happen...?

(READ OUT – ONE ANSWER ONLY)

Often	1
From time to time	2
Rarely	3
Never	4
DK	5

EB75.3 QA3

DO NOT ASK QA4a IN CY(tcc) – CY(tcc) GO TO QA4b

QA4a How would you judge the current situation in each of the following?

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

	(READ OUT)	Very good	Rather good	Rather bad	Very bad	DK
1	The situation of the (NATIONALITY) economy	1	2	3	4	5
2	The situation of the European economy	1	2	3	4	5
3	The situation of the economy in the world	1	2	3	4	5
4	Your personal job situation	1	2	3	4	5
5	The financial situation of your household	1	2	3	4	5
6	The employment situation in (OUR COUNTRY)	1	2	3	4	5

EB75.3 QA4a

ASK QA4b ONLY IN CY(tcc) – OTHERS GO TO QA5a

QA4b **How would you judge the current situation in each of the following?**
(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

	(READ OUT)	Very good	Rather good	Rather bad	Very bad	DK
1	The economic situation in the Turkish Cypriot Community	1	2	3	4	5
2	The situation of the European economy	1	2	3	4	5
3	The situation of the economy in the world	1	2	3	4	5
4	Your personal job situation	1	2	3	4	5
5	The financial situation of your household	1	2	3	4	5
6	The employment situation in the Turkish Cypriot Community	1	2	3	4	5

EB75.3 QA4b

DO NOT ASK QA5a IN CY(tcc) – CY(tcc) GO TO QA5b

QA5a **What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?**
(ONE ANSWER PER LINE)

	(READ OUT)	Better	Worse	Same	DK
1	Your life in general	1	2	3	4
2	The economic situation in (OUR COUNTRY)	1	2	3	4
3	The financial situation of your household	1	2	3	4
4	The employment situation in (OUR COUNTRY)	1	2	3	4
5	Your personal job situation	1	2	3	4
6	The economic situation in the EU	1	2	3	4
7	The economic situation in the world	1	2	3	4

EB75.3 QA6a

ASK QA5b ONLY IN CY(tcc) – OTHERS GO TO QA6a1

QA5b **What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?**
(ONE ANSWER PER LINE)

	(READ OUT)	Better	Worse	Same	DK
1	Your life in general	1	2	3	4
2	The economic situation in the Turkish Cypriot Community	1	2	3	4
3	The financial situation of your household	1	2	3	4
4	The employment situation in the Turkish Cypriot Community	1	2	3	4
5	Your personal job situation	1	2	3	4
6	The economic situation in the EU	1	2	3	4
7	The economic situation in the world	1	2	3	4

EB75.3 QA6b

DO NOT ASK QA6a1 AND QA7a1 IN CY(tcc) – CY(tcc) GO TO QA6b1 – ASK QA6a1 AND QA7a1 ONLY TO SPLIT A – SPLIT B GO TO QA6a2

QA6a1 **What do you think are the two most important issues facing (OUR COUNTRY) at the moment?**
(SHOW CARD – READ OUT – MAX. 2 ANSWERS)

Crime	1,
Economic situation	2,
Rising prices/ inflation	3,
Taxation	4,
Unemployment	5,
Terrorism	6,
Defence/ Foreign affairs	7,
Housing	8,
Immigration	9,
Healthcare system	10,
The educational system	11,
Pensions	12,
The environment	13,
Energy	14,
Other (SPONTANEOUS)	15,
None (SPONTANEOUS)	16,
DK	17,

EB75.3 QA7a1

QA7a1 **And personally, what are the two most important issues you are facing at the moment?**
(SHOW CARD – READ OUT – MAX. 2 ANSWERS)

Crime	1,
Economic situation	2,
Rising prices/ inflation	3,
Taxation	4,
Unemployment	5,
Terrorism	6,
Defence/ Foreign affairs	7,
Housing	8,
Immigration	9,
Healthcare system	10,
The educational system	11,
Pensions	12,
The environment	13,
Energy	14,
Other (SPONTANEOUS)	15,
None (SPONTANEOUS)	16,
DK	17,

EB75.3 QA8a1

DO NOT ASK QA6a2 AND QA7a2 IN CY(tcc) – CY(tcc) GO TO QA6b1 – ASK QA6a2 AND QA7a2 ONLY TO SPLIT B – SPLIT A GO TO QA8

QA6a2 **What do you think are the two most important issues facing (OUR COUNTRY) at the moment?**

(SHOW CARD – READ OUT – MAX. 2 ANSWERS)

Crime	1,
Economic situation	2,
Rising prices/ inflation	3,
Taxation	4,
Unemployment	5,
Terrorism	6,
(OUR COUNTRY)'s external influence	7,
Government debt	8,
Immigration	9,
Healthcare system	10,
The education system	11,
Pensions	12,
The environment	13,
Energy supply	14,
Climate change	15,
Other (SPONTANEOUS)	16,
None (SPONTANEOUS)	17,
DK	18,

EB75.3 QA7a2

QA7a2 **And personally, what are the two most important issues you are facing at the moment?**

(SHOW CARD – READ OUT – MAX. 2 ANSWERS)

Crime	1,
Economic situation	2,
Rising prices/ inflation	3,
Taxation	4,
Unemployment	5,
Terrorism	6,
(OUR COUNTRY)’s external influence	7,
Private debt	8,
Immigration	9,
Healthcare system	10,
The education system	11,
Pensions	12,
The environment	13,
Energy costs	14,
Climate change	15,
Other (SPONTANEOUS)	16,
None (SPONTANEOUS)	17,
DK	18,

EB75.3 QA8a2

ASK QA6b1 AND QA7b1 ONLY IN CY(tcc) – OTHERS GO TO QA8 – ASK QA6b1 AND QA7b1 ONLY TO SPLIT A – SPLIT B GO TO QA6b2

QA6b1 **What do you think are the two most important issues facing our Community at the moment?**

(SHOW CARD – READ OUT – MAX. 2 ANSWERS)

Crime	1,
Economic situation	2,
Rising prices/ inflation	3,
Taxation	4,
Unemployment	5,
Terrorism	6,
Cyprus issue	7,
Housing	8,
Immigration	9,
Healthcare system	10,
The educational system	11,
Pensions	12,
The environment	13,
Energy	14,
Other (SPONTANEOUS)	15,
None (SPONTANEOUS)	16,
DK	17,

EB75.3 QA7b1

QA7b1 **And personally, what are the two most important issues you are facing for the moment?**

(SHOW CARD – READ OUT – MAX. 2 ANSWERS)

Crime	1,
Economic situation	2,
Rising prices/ inflation	3,
Taxation	4,
Unemployment	5,
Terrorism	6,
Cyprus issue	7,
Housing	8,
Immigration	9,
Healthcare system	10,
The educational system	11,
Pensions	12,
The environment	13,
Energy	14,
Other (SPONTANEOUS)	15,
None (SPONTANEOUS)	16,
DK	17,

EB75.3 QA8b1

ASK QA6b2 AND QA7b2 ONLY IN CY(tcc) – OTHERS GO TO QA8 – ASK QA6b2 AND QA7b2 ONLY TO SPLIT B – SPLIT A GO TO QA8

QA6b2 **What do you think are the two most important issues facing our Community at the moment?**

(SHOW CARD – READ OUT – MAX. 2 ANSWERS)

Crime	1,
Economic situation	2,
Rising prices/ inflation	3,
Taxation	4,
Unemployment	5,
Terrorism	6,
Our Community's external influence	7,
Our Community's debt	8,
Immigration	9,
Healthcare system	10,
The education system	11,
Pensions	12,
The environment	13,
Energy supply	14,
Climate change	15,
Other (SPONTANEOUS)	16,
None (SPONTANEOUS)	17,
DK	18,

EB75.3 QA7b2

QA7b2 **And personally, what are the two most important issues you are facing at the moment?**

(SHOW CARD – READ OUT – MAX. 2 ANSWERS)

Crime	1,
Economic situation	2,
Rising prices/ inflation	3,
Taxation	4,
Unemployment	5,
Terrorism	6,
Our community's external influence	7,
Private debt	8,
Immigration	9,
Healthcare system	10,
The education system	11,
Pensions	12,
The environment	13,
Energy costs	14,
Climate change	15,
Other (SPONTANEOUS)	16,
None (SPONTANEOUS)	17,
DK	18,

EB75.3 QA8b2

ASK ALL

QA8 **What do you think are the two most important issues facing the EU at the moment?**
(SHOW CARD – READ OUT – MAX. 2 ANSWERS)

Crime	1,
Economic situation	2,
Rising prices/ inflation	3,
Taxation	4,
Unemployment	5,
Terrorism	6,
EU's influence in the world	7,
The state of Member States public finances	8,
Immigration	9,
Pensions	10,
The environment	11,
Energy supply	12,
Climate change	13,
Other (SPONTANEOUS)	14,
None (SPONTANEOUS)	15,
DK	16,

EB75.3 QA9

DO NOT ASK QA9a IN CY(tcc) – CY(tcc) GO TO QA9b

QA9a **At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in…?**
(ONE ANSWER PER LINE)

	(READ OUT)	Things are going in the right direction	Things are going in the wrong direction	Neither the one nor the other (SPONTA-NEOUS)	DK
1	(OUR COUNTRY)	1	2	3	4
2	The European Union	1	2	3	4
3	The world	1	2	3	4

EB75.3 QA12a

ASK QA9b ONLY IN CY(tcc) – OTHERS GO TO QA10

QA9b **At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in…?**
(ONE ANSWER PER LINE)

	(READ OUT)	Things are going in the right direction	Things are going in the wrong direction	Neither the one nor the other (SPONTAN-EOUS)	DK
1	Our Community	1	2	3	4
2	The European Union	1	2	3	4
3	The world	1	2	3	4

EB75.3 QA12b

ASK ALL

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

(ONE ANSWER PER LINE)

	(READ OUT)	Tend to trust	Tend not to trust	DK
1	The press	1	2	3
2	Radio	1	2	3
3	Television	1	2	3
4	The Internet	1	2	3
5	Political parties	1	2	3
6	*(NOT IN CY(tcc))* The (NATIONALITY) Government	1	2	3
7	*(NOT IN CY(tcc))* The (NATIONALITY PARLIAMENT) (USE PROPER NAME FOR LOWER HOUSE)	1	2	3
8	The European Union	1	2	3
9	The United Nations	1	2	3
10	Regional or local public authorities	1	2	3

EB74.2 QA12a&b (items 1-5) + EB73.4 QA14 (item 10) + EB75.3 QA13 (items 6-9) TREND MODIFIED

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

(ONE ANSWER ONLY)

Very positive	1
Fairly positive	2
Neutral	3
Fairly negative	4
Very negative	5
DK	6

EB75.3 QA14

QA12 **What does the EU mean to you personally?**

(SHOW CARD – READ OUT – ROTATE TOP TO BOTTOM/ BOTTOM TO TOP – MULTIPLE ANSWERS POSSIBLE)

Peace	1,
Economic prosperity	2,
Democracy	3,
Social protection	4,
Freedom to travel, study and work anywhere in the EU	5,
Cultural diversity	6,
Stronger say in the world	7,
Euro	8,
Unemployment	9,
Bureaucracy	10,
Waste of money	11,
Loss of our cultural identity	12,
More crime	13,
Not enough control at external borders	14,
Other (SPONTANEOUS)	15,
DK	16,

EB75.3 QA15

QA13 **Have you heard of…?**

(ONE ANSWER PER LINE)

	(READ OUT)	Yes	No	DK
1	The European Parliament	1	2	3
2	The European Commission	1	2	3
3	The Council of the European Union	1	2	3
4	The European Central Bank	1	2	3

EB75.3 QA16

QA14 **For each of the following European bodies, please tell me if you tend to trust it or tend not to trust it.**

(ONE ANSWER PER LINE)

	(READ OUT)	Tend to trust	Tend not to trust	DK
1	The European Parliament	1	2	3
2	The European Commission	1	2	3
3	The Council of the European Union	1	2	3
4	The European Central Bank	1	2	3

EB75.3 QA17

QA15 **For each of the following statements about the EU could you please tell me whether you think it is true or false.**

(ONE ANSWER PER LINE)

	(READ OUT – ROTATE)	True.	False.	DK
1	The EU currently consists of 27 Member States	1	2	3
2	The members of the European Parliament are directly elected by the citizens of each Member State	1	2	3
3	Switzerland is a member of the EU	1	2	3

EB75.3 QA18

QA16 **What is your opinion on each of the following statements? Please tell me for each statement, whether you are for it or against it.**

(ONE ANSWER PER LINE)

	(READ OUT – ROTATE)	For	Against	DK
1	A European economic and monetary union with one single currency, the euro	1	2	3
2	A common foreign policy of the 27 Member States of the EU	1	2	3
3	Further enlargement of the EU to include other countries in future years	1	2	3
4	A common defence and security policy among EU Member States	1	2	3

EB75.3 QA19

QA17 **With which of the following two statements do you most agree?**

(READ OUT – ONE ANSWER ONLY)

The EU should have greater financial means given its political objectives	1
The EU's political objectives do not justify an increase in the Union's budget	2
DK	3

EB75.3 QA20

ASK QA18a AND QA18b IN EU27 – CY(tcc) GO TO QA19b – OTHERS GO TO QA19a

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)?

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

(SHOW CARD WITH SCALE – ONE ANSWER PER COLUMN)

(READ OUT)	**QA18a** In (OUR COUNTRY)	**QA18b** In the European Union
Very satisfied	1	1
Fairly satisfied	2	2
Not very satisfied	3	3
Not at all satisfied	4	4
DK	5	5

EB73.4 QA24a&b

DO NOT ASK QA19a IN CY(tcc) – CY(tcc) GO TO QA19b

QA19a Please tell me for each statement, whether you tend to agree or tend to disagree.

(ONE ANSWER PER LINE)

	(READ OUT)	Tend to agree	Tend to disagree	DK
1	I understand how the EU works	1	2	3
2	*(ONLY IN EU27)* The interests of (OUR COUNTRY) are well taken into account in the EU	1	2	3
3	My voice counts in the EU	1	2	3
4	The EU's voice counts in the world	1	2	3
5	Globalisation is an opportunity for economic growth	1	2	3

EB75.3 QA21a

ASK QA19b ONLY IN CY(tcc) – OTHERS GO TO QA20

QA19b Please tell me for each statement, whether you tend to agree or tend to disagree.

(ONE ANSWER PER LINE)

	(READ OUT)	Tend to agree	Tend to disagree	DK
1	I understand how the EU works	1	2	3
2	My voice counts in the EU	1	2	3
3	The EU's voice counts in the world	1	2	3
4	Globalisation is an opportunity for economic growth	1	2	3

EB75.3 QA21b

ASK QA20 AND QA21 ONLY IN EU27 – OTHERS GO TO QB1

QA20 **For each of the following areas, do you think that decisions should be made by the (NATIONALITY) Government, or made jointly within the EU?**

(ONE ANSWER PER LINE)

	(READ OUT – ROTATE)	(NATIONALITY) Government	Jointly within the EU	DK
1	Taxation	1	2	3
2	Tackling unemployment (M)	1	2	3
3	Fighting terrorism	1	2	3
4	Defence and foreign affairs	1	2	3
5	Immigration	1	2	3
6	Pensions	1	2	3
7	Protecting the environment	1	2	3
8	Social welfare	1	2	3
9	Agriculture and fishery	1	2	3
10	Support for regions facing economic difficulties	1	2	3
11	Reducing public debt (N)	1	2	3

EB74.2 QA22 (items 1 - 7) + EB73.4 QA23 (items 8 - 10) TREND MODIFIED

QA21 **Would you say that you are very optimistic, fairly optimistic, fairly pessimistic or very pessimistic about the future of the EU?**

(ONE ANSWER ONLY)

Very optimistic	1
Fairly optimistic	2
Fairly pessimistic	3
Very pessimistic	4
DK	5

EB75.3 QA23

B. EUROPE 2020

ASK QB ONLY IN EU27 – OTHERS GO TO QC1

To exit the financial and economic crisis and face the world new challenges the EU has defined a strategy called Europe 2020. Europe 2020 puts forward different objectives. Let's now discuss them.

QB1 **For each of the following initiatives, please tell me how important or not you think they are in order for the EU to exit the present financial and economic crisis and prepare for the next decade. Please use a scale from 1 to 10, where '1' means that you think this initiative is "not at all important" and '10' means that it is "very important".**
(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

	(READ OUT)	1 Not at all important	2	3	4	5	6	7	8	9	10 Very important	DK
1	To increase the support for research and development policies and turn inventions into products	1	2	3	4	5	6	7	8	9	10	11
2	To enhance the quality and appeal of EU's higher education system	1	2	3	4	5	6	7	8	9	10	11
3	To develop the e-economy by strengthening ultra fast Internet within the EU	1	2	3	4	5	6	7	8	9	10	11
4	To support an economy that uses less natural resources and emits less greenhouse gas	1	2	3	4	5	6	7	8	9	10	11
5	To help the EU's industrial base to be more competitive by promoting entrepreneurship and developing new skills	1	2	3	4	5	6	7	8	9	10	11
6	To modernise labour markets, with a view to raising employment levels	1	2	3	4	5	6	7	8	9	10	11
7	To help the poor and socially excluded and enable them to play an active part in society	1	2	3	4	5	6	7	8	9	10	11

EB75.3 QB1

QB2 **Thinking about each of the following objectives to be reached by 2020 in the EU, would you say that it is too ambitious, about right or too modest?**

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

	(READ OUT)	Too ambitious	About right	Too modest	DK
1	Three quarters of men and women between 20 and 64 years of age should have a job	1	2	3	4
2	The share of funds invested in research and development should reach 3% of the wealth produced in the EU each year	1	2	3	4
3	To reduce EU greenhouse gas emissions by at least 20% by 2020 compared to 1990	1	2	3	4
4	To increase the share of renewable energy in the EU by 20% by 2020	1	2	3	4
5	To increase the energy efficiency in the EU by 20% by 2020	1	2	3	4
6	The number of young people leaving school with no qualifications should fall to 10%	1	2	3	4
7	At least 40% of the younger generation should have a degree or a diploma	1	2	3	4
8	The number of Europeans living below the poverty line should be reduced by a quarter by 2020	1	2	3	4

EB75.3 QB2

QB3a **Thinking about innovation, what do you think should be the EU's priority? Firstly?**

(SHOW CARD - ONE ANSWER ONLY)

QB3b **And then?**

(SHOW CARD - MULTIPE ANSWERS POSSIBLE

(READ OUT - ROTATE)	QB3a FIRSTLY	QB3b AND THEN
Refocus research on new challenges such as climate change, energy and resource efficiency	1	1,
Encourage cooperation between researchers	2	2,
Give more financial support to research	3	3,
DK	4	4,

EB75.3 QB3a&b

QB4a **Thinking about young people, what do you think should be the EU's priority? Firstly?**

(SHOW CARD - ONE ANSWER ONLY)

QB4b **And then?**

(SHOW CARD - MULTIPE ANSWERS POSSIBLE

(READ OUT - ROTATE)	QB4a FIRSTLY	QB4b AND THEN
Encouraging students to study in another EU country	1	1,
Increasing the overall quality of all levels of education	2	2,
Getting more young people into employment	3	3,
DK	4	4,

EB75.3 QB4a&b

QB5a **Thinking about the Internet, what do you think should be the EU's priority? Firstly?**
(SHOW CARD - ONE ANSWER ONLY)

QB5b **And then?**
(SHOW CARD - MULTIPE ANSWERS POSSIBLE

(READ OUT - ROTATE)	QB5a	QB5b
	FIRSTLY	**AND THEN**
Develop further Internet services to the citizens (e.g. E-government, online health)	1	1,
Increase consumer confidence in e-commerce (buying goods and services online)	2	2,
Extending broadband access to all European citizens	3	3,
DK	4	4,

EB75.3 QB5a&b

QB6a **Thinking about energy, what do you think should be the EU's priority? Firstly?**
(SHOW CARD - ONE ANSWER ONLY)

QB6b **And then?**
(SHOW CARD - MULTIPE ANSWERS POSSIBLE

(READ OUT - ROTATE)	QB6a	QB6b
	FIRSTLY	**AND THEN**
To lower carbon emissions (CO2) from the transport sector	1	1,
To give financial support to small business and households to make their energy consumption more efficient	2	2,
To promote renewable sources of energy	3	3,
DK	4	4,

EB75.3 QB6a&b

QB7a **Thinking about industry, what do you think should be the EU's priority? Firstly?**
(SHOW CARD - ONE ANSWER ONLY)

QB7b **And then?**
(SHOW CARD - MULTIPE ANSWERS POSSIBLE

(READ OUT - ROTATE)	QB7a	QB7b
	FIRSTLY	**AND THEN**
To change the rules to make it easier to set up and run a business, especially small and medium sized businesses	1	1,
To restructure those industries in difficulty	2	2,
To make the most of the opportunities of the green economy (i.e. environmental technologies, recycling, renewable energy)	3	3,
DK	4	4,

EB75.3 QB7a&b

QB8a **Thinking about jobs and skills, what should be the EU's priority? Firstly?**
(SHOW CARD - ONE ANSWER ONLY)

QB8b **And then?**
(SHOW CARD - MULTIPE ANSWERS POSSIBLE

(READ OUT - ROTATE)	QB8a	QB8b
	FIRSTLY	**AND THEN**
To help people adapt to new working conditions and potential career shifts	1	1,
To safeguard people's rights to live and work in another EU country	2	2,
To promote education and training opportunities for all those of working age ("lifelong learning")	3	3,
DK	4	4,

EB75.3 QB8a&b

QB9a **Thinking about poverty, what should be the EU's priority? Firstly?**
(SHOW CARD - ONE ANSWER ONLY)

QB9b **And then?**
(SHOW CARD - MULTIPE ANSWERS POSSIBLE

(READ OUT - ROTATE)	**QB9a** **FIRSTLY**	**QB9b** **AND THEN**
To provide innovative education, training and employment opportunities to the most vulnerable	1	1,
To ensure the sustainability of social protection and pension systems and better access to health care systems	2	2,
To fight discrimination and help those groups at risk (such as one-parent families, elderly women, minorities, Roma, people with a disability and homeless people)	3	3,
DK	4	4,

EB75.3 QB9a&b

QB10 **Having heard about the priorities of the EU, do you think that the EU is going in the right direction or in the wrong direction to exit the crisis and face the world new challenges?**

(ONE ANSWER ONLY)

In the right direction	1
In the wrong direction	2
Neither the one or the other (SPONTANEOUS)	3
DK	4

EB75.3 QB10

C. THE EUROPEANS AND THE CRISIS

ASK ALL

QC1 **Some analysts say that the impact of the economic crisis on the job market has already reached its peak and things will recover little by little. Others, on the contrary, say that the worst is still to come. Which of the two statements is closer to your opinion?**

(READ OUT – ONE ANSWER ONLY)

The impact of the crisis on jobs has already reached its peak	1
The worst is still to come	2
DK	3

EB75.3 QC1

QC2 **Which of the following statements best reflects your household situation?**

(SHOW CARD – READ OUT – ONE ANSWER ONLY)

Your current situation does not allow you to make any plan for the future. You live day by day	1
You know what you will be doing in the next six months	2
You have a long-term perspective of what your household will be in the next 1 or 2 years	3
Other	4
DK	5

EB75.3 QC2

DO NOT ASK QC3a IN CY(tcc) – CY(tcc) GO TO QC3b

QC3a **In your opinion, which of the following is best able to take effective actions against the effects of the financial and economic crisis?**

(SHOW CARD – READ OUT – ROTATE – ONE ANSWER ONLY)

The (NATIONALITY) Government	1
The European Union	2
The United States	3
The G20	4
The International Monetary Fund (IMF)	5
Other (SPONTANEOUS)	6
None (SPONTANEOUS)	7
DK	8

EB75.3 QC3a

ASK QC3b ONLY IN CY(tcc) – OTHERS GO TO QC4a

QC3b **In your opinion, which of the following is best able to take effective actions against the effects of the financial and economic crisis?**

(SHOW CARD – READ OUT – ROTATE – ONE ANSWER ONLY)

Our Community's authorities	1
The European Union	2
The United States	3
The G20	4
The International Monetary Fund (IMF)	5
Other (SPONTANEOUS)	6
None (SPONTANEOUS)	7
DK	8

EB75.3 QC3b

DO NOT ASK QC4a IN CY(tcc) – CY(tcc) GO TO QC4b

QC4a For each of the following statements, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

	(READ OUT)	Totally agree	Tend to agree	Tend to disagree	Totally disagree	DK
1	(OUR COUNTRY) needs reforms to face the future	1	2	3	4	5
2	*(ONLY IN EU27)* EU Member States should work together more in tackling the financial and economic crisis	1	2	3	4	5
3	*(ONLY TO SPLIT A)* Measures to reduce the public deficit and debt in (OUR COUNTRY) cannot be delayed	1	2	3	4	5
4	*(ONLY TO SPLIT B)* Measures to reduce the public deficit and debt in (OUR COUNTRY) are not a priority for now	1	2	3	4	5

EB75.3 QC6a TREND MODIFIED

ASK QC4b ONLY IN CY(tcc) – EU27 GO TO QC5 – OTHERS GO TO QC6

QC4b For each of the following statements, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree.

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

	(READ OUT)	Totally agree	Tend to agree	Tend to disagree	Totally disagree	DK
1	Our Community needs reforms to face the future	1	2	3	4	5
2	*(ONLY TO SPLIT A)* Measures to reduce the public deficit and debt in our Community cannot be delayed	1	2	3	4	5
3	*(ONLY TO SPLIT B)* Measures to reduce the public deficit and debt in our Community are not a priority for now	1	2	3	4	5

EB75.3 QC6b TREND MODIFIED

ASK QC5 ONLY IN EU27 – OTHERS GO TO QC6

QC5 **A range of measures to tackle the current financial and economic crisis is being discussed in the European institutions. For each, could you tell me whether you think it would be effective or not?**
(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

	(READ OUT – ROTATE)	Very effective	Fairly effective	Not very effective	Not at all effective	DK
1	A more important role for the EU in regulating financial services	1	2	3	4	5
2	A stronger coordination of economic policy among all the EU Member States	1	2	3	4	5
3	A stronger coordination of economic and financial policies among the countries of the euro area	1	2	3	4	5

EB75.3 QC7 TREND MODIFIED

ASK ALL

QC6 **Thinking about reform global financial markets, please tell me whether you are in favour or opposed to the following measures to be taken by the EU.**
(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

	(READ OUT – ROTATE)	Strongly in favour	Fairly in favour	Fairly opposed	Strongly opposed	DK
1	Tougher rules on tax avoidance and tax havens	1	2	3	4	5
2	The introduction of a tax on profits made by banks	1	2	3	4	5
3	The introduction of a tax on financial transactions	1	2	3	4	5
4	The regulation of wages in the financial sector (i.e. traders' bonuses)	1	2	3	4	5
5	A closer supervision of so-called "hedge funds"	1	2	3	4	5
6	Increasing transparency of financial markets	1	2	3	4	5
7	The introduction of Eurobonds (European bonds) (N)	1	2	3	4	5
8	Tighter rules for credit rating agencies (N)	1	2	3	4	5

EB75.3 QC8 TREND MODIFIED

D. INFORMATION ON EUROPEAN POLITICAL MATTERS

ASK ALL

QD1 Overall, to what extent do you think that in (OUR COUNTRY) people are well informed or not about European matters?

(READ OUT - ONE ANSWER ONLY)

Very well informed	1
Fairly well informed	2
Not very well informed	3
Not at all informed	4
DK	5

EB74.2 QD1

QD2 And overall, to what extent do you think that you are well informed or not about European matters?

(READ OUT - ONE ANSWER ONLY)

Very well informed	1
Fairly well informed	2
Not very well informed	3
Not at all informed	4
DK	5

EB74.2 QD2

QD3 Could you tell me to what extent you…?

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

	(READ OUT)	Every day/ Almost every day	Two or three times a week	About once a week	Two or three times a month	Less often	Never	No access to this medium (SPONTANEOUS)	DK
1	Watch television on a TV set (M)	1	2	3	4	5	6	7	8
2	Watch television via the Internet (N)	1	2	3	4	5	6	7	8
3	Listen to the radio	1	2	3	4	5	6	7	8
4	Read the written press	1	2	3	4	5	6	7	8
5	Use the Internet	1	2	3	4	5	6	7	8
6	Use online social networks	1	2	3	4	5	6	7	8

EB74.2 QD3 TREND MODIFIED

QD4a **Where do you get most of your news on national political matters? Firstly?**
(SHOW CARD - ONE ANSWER ONLY)
QD4b **And then?**
(SHOW CARD - MULTIPE ANSWERS POSSIBLE

(READ OUT)	QD4a FIRSTLY	QD4b AND THEN
Television	1	1,
The press	2	2,
Radio	3	3,
The Internet	4	4,
Other (SPONTANEOUS)	5	5,
You do not look for news on national political matters (SPONTANEOUS)	6	6,
DK	7	7,

NEW

QD5a **Where do you get most of your news on European political matters? Firstly?**
(SHOW CARD - ONE ANSWER ONLY)
QD5b **And then?**
(SHOW CARD - MULTIPE ANSWERS POSSIBLE

(READ OUT)	QD5a FIRSTLY	QD5b AND THEN
Television	1	1,
The press	2	2,
Radio	3	3,
The Internet	4	4,
Other (SPONTANEOUS)	5	5,
You do not look for news on national political matters (SPONTANEOUS)	6	6,
DK	7	7,

EB74.2 QD4a&b

ASK QD6 IF "GET INFORMATION ON NATIONAL POLITICAL MATTERS ON THE INTERNET", CODE 4 IN QD4a OR QD4b – OTHERS GO TO QD7

QD6 **On the Internet, which of the following websites do you use to get news on national political matters?**

(SHOW CARD – READ OUT – ROTATE – MULTIPLE ANSWERS POSSIBLE)

Institutional and official websites (governmental websites, etc.)	1,
Information websites (websites from newspapers, news magazines, etc.)	2,
Online social networks	3,
Blogs	4,
Video hosting websites	5,
Other (SPONTANEOUS)	6,
None (SPONTANEOUS)	7,
DK	8,

NEW

ASK QD7 IF "GET INFORMATION ON EUROPEAN POLITICAL MATTERS ON THE INTERNET", CODE 4 IN QD5a OR QD5b – OTHERS GO TO QD8

QD7 On the Internet, which of the following websites do you use to get news on European political matters?

(SHOW CARD – READ OUT – ROTATE – MULTIPLE ANSWERS POSSIBLE)

Institutional and official websites (governmental websites, etc.)	1,
Information websites (websites from newspapers, news magazines, etc.)	2,
Online social networks	3,
Blogs	4,
Video hosting websites	5,
Other (SPONTANEOUS)	6,
None (SPONTANEOUS)	7,
DK	8,

NEW

ASK QD8 IF "USE THE INTERNET", CODE 1 TO 5 IN QD3.2 OR QD3.5 – OTHERS GO TO QD9

QD8 Which of these two statements on the Internet is closer to your opinion?

(READ OUT – ROTATE – ONE ANSWER ONLY)

You trust institutional and official websites more than other websites	1
You trust institutional and official websites less than other websites	2
You make no difference between institutional and official websites and other websites (SPONTANEOUS)	3
You don't trust what's on the Internet (SPONTANEOUS)	4
DK	5

NEW

ASK ALL

QD9 When you are looking for information about the EU, its policies, its institutions, which of the following sources do you use?

(SHOW CARD – READ OUT – MULTIPLE ANSWERS POSSIBLE)

Attending conferences, talks, meetings	1,
Discussions with relatives, friends, colleagues	2,
Daily newspapers	3,
Other newspapers, magazines	4,
Television	5,
Radio	6,
The Internet	7,
Books, brochures, information leaflets	8,
Telephone (Info lines, Europe Direct, etc.)	9,
Other (SPONTANEOUS)	10,
Never look for such information, not interested (SPONTANEOUS)	11,
DK	12,

EB74.2 QD5

QD10 Generally speaking, do you think that the (NATIONALITY) ... talk(s) too much, about the right amount or too little about the EU?

(ONE ANSWER PER LINE)

	(READ OUT)	Too much	Enough	Too little	DK
1	Television	1	2	3	4
2	Radio	1	2	3	4
3	Press	1	2	3	4
4	Websites	1	2	3	4

EB74.2 QD6

QD11 **Do you think that the (NATIONALITY) ... present(s) the EU too positively, objectively or too negatively?**

(ONE ANSWER PER LINE)

	(READ OUT)	Too positively	Objectively	Too negatively	DK
1	Television	1	2	3	4
2	Radio	1	2	3	4
3	Press	1	2	3	4
4	Websites	1	2	3	4

EB74.2 QD7

QD12 **On which of the following websites would you find it useful to find information on the EU?**

(SHOW CARD – READ OUT – ROTATE – MULTIPLE ANSWERS POSSIBLE)

Institutional and official websites (governmental websites, etc.)	1,
Information websites (websites from newspapers, news magazines, etc.)	2,
Online social networks	3,
Blogs	4,
Video hosting websites	5,
Other (SPONTANEOUS)	6,
None (SPONTANEOUS)	7,
DK	8,

NEW

QD13 **Regardless of wether you participate in online social networks or not (social networking websites, blogs, video hosting websites), please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree with each of the following statements. (M)**

(SHOW CARD WITH SCALE – ONE ANSWER PER LINE)

	(READ OUT – ROTATE)	Totally agree	Tend to agree	Tend to disagree	Totally disagree	DK
1	Online social networks are a modern way to keep abreast of political affairs	1	2	3	4	5
2	Information on political affairs from online social networks cannot be trusted	1	2	3	4	5
3	Online social networks can get people interested in political affairs	1	2	3	4	5
4	Online social networks are a good way to have your say on political issues	1	2	3	4	5

EB74.2 QD8