European Commission

EUROBAROMETER

EUROBAROMETER 72
PUBLIC OPINION IN THE EUROPEAN UNION

FIRST RESULTS

Fieldwork: October - November 2009

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This survey was requested and coordinated by the Directorate-General for Communication.
http://europa.eu.int/comm/public_opinion/index_en.htm

Standard Eurobarometer 72/ Autumn 2009 - *TNS Opinion & Social*

Standard Eurobarometer 72

Public opinion in the European Union

Conducted by TNS Opinion & Social at the request of Directorate General Communication

Survey co-ordinated by Directorate General Communication

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TABLE OF CONTENTS

Introduction

This wave of the Standard Eurobarometer was carried out from 23 October to 18 November 2009[1]; it was fielded in 31 countries or territories: the 27 European Union Member States, the three candidate countries (Croatia, the Former Yugoslav Republic of Macedonia and Turkey) and the Turkish Cypriot Community in the part of the country that is not controlled by the government of the Republic of Cyprus.

Starting in spring 2008, the Eurobarometer has registered significant shifts in European public opinion, with the economic crisis being the main driver of Europeans' perceptions and opinions. It is therefore essential to examine these results not only over a longer interval but also in the context of the specific circumstances in which the most recent surveys have taken place.

In autumn 2009, the peak of the economic crisis appears to have been reached and we are now at a turning point. For the first time in two years, the EU economy is growing again. Whilst the worst of the recession may be over, the full impact on the labour market and public finances is still to come[2].

In terms of European public opinion, the Eurobarometer has captured the full cycle of the crisis, showing how it evolved from an economic 'feel-good' situation[3] prior to the economic crisis to growing concern about the economic outlook that by autumn 2008 permeated all aspects of life – and by spring 2009 appeared so intense that resilient indicators of public opinion began to crack - to the current situation where this 'feel-bad' factor seems to have begun to recede again.

The 'crisis surveys' have also shown that the economic crisis widened the gap in living standards between the Northern and Western European countries and those in the South and East of Europe. Already vulnerable groups, in particular the unemployed, have been most strongly hit by the crisis. In summary, the economic crisis has had a profound impact; the recovery process has only just begun but it will take much more time before life in the European Union is back to the pre-crisis situation.

[1] For precise details of the fieldwork dates in each country, please refer to the technical specifications.
[2] European Economic Forecast – autumn 2009:
http://ec.europa.eu/economy_finance/publications/publication16055_en.pdf
[3] Economic feel-good factor refers to how good consumers feel about the economy which in turn affects their consumption habits. In this report, economic feel-good/bad factor has an extended meaning and it refers to the extended impact over opinions on other than economic issues.

This report focuses on results from EU27 Member States and is divided into two main parts. In the first part we look at the impact of the economic crisis and Europeans' main concerns. We also present a set of trend indicators related to Europeans' expectations for the coming year. Part I closes with an analysis of how the European Union financial system should be reformed and looks at ways in which Europeans believe sustainable growth can be achieved in a global economy.

In the second part the projection of this general mood is analysed in terms of indicators that measure perceptions and opinions about the European Union and its institutions.

The methodology used is that of the Standard Eurobarometer surveys of the Directorate-General for Communication ("Research and Political Analysis" Unit). A technical note concerning the interviews, carried out by the institutes within the TNS Opinion & Social network, is annexed to this report. This note describes the interview method used, as well as the confidence intervals[4].

The reader should be aware that there are four types of deliverables for the Standard Eurobarometer.

1) First Results: This gives a concise highlights package of results for trend indicators, providing an at-a-glance overview of the state of European public opinion on key issues.

2) Full Report: An in-depth analysis of all the questions asked in a Standard Eurobarometer wave.

3) National Reports: Analysis focusing mainly on the comparison between national results and the EU average. They are published by the national representations of the European Commission and written in national language(s). Executive summaries of these national reports exist and are published in English on the 'europa' website.

4) Country fact sheets: Graphic illustration of the results for each country or territory covered by the survey, presenting the comparison between national results and the EU average.

The Eurobarometer web site can be consulted at the following address:
http://ec.europa.eu/public_opinion/index_en.htm

We would like to take the opportunity to thank all the respondents across the continent who have given their time to take part in this survey.
Without their active participation, this study would not have been possible.

[4] The results tables are included in the annex. It should be noted that the total of the percentages in the tables of this report may exceed 100% when the respondent can give several answers to the same question.

In this report, the countries are represented by their official abbreviations. The abbreviations used in this report correspond to:

ABBREVIATIONS	
EU27	European Union – 27 Member States
DK/NA	Don't know / No answer
BE	Belgium
BG	Bulgaria
CZ	Czech Republic
DK	Denmark
D-E	*East Germany*
DE	Germany*
D-W	*West Germany*
EE	Estonia
EL	Greece
ES	Spain
FR	France
IE	Ireland
IT	Italy
CY	Republic of Cyprus**
CY (tcc)	Area not controlled by the 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	The United Kingdom
HR	Croatia
TR	Turkey
MK	The Former Yugoslav Republic of Macedonia***

* Data presented in the report are exclusively those of Germany as a whole. However, data for "East" and "West" Germany are also available in the data tables.

** Cyprus as a whole is one of the 27 European Union Member States. However, the "*acquis communautaire*" is suspended in the part of the country that is not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews conducted in the part of the country controlled by the government of the Republic of Cyprus are recorded in the category "CY" and included in the EU27 average. The interviews conducted in the part of the country not controlled by the government of the Republic of Cyprus are recorded in the category "CY(tcc)" [tcc: *Turkish Cypriot Community*].

*** Provisional code which does not prejudge in any way the definitive nomenclature for this country, which will be agreed following the conclusion of negotiations currently taking place at the United Nations.

Results for CY(tcc), HR, TR and MK are available in the Annex to this report providing the data tables.

PART I: THE IMPACT OF THE CRISIS

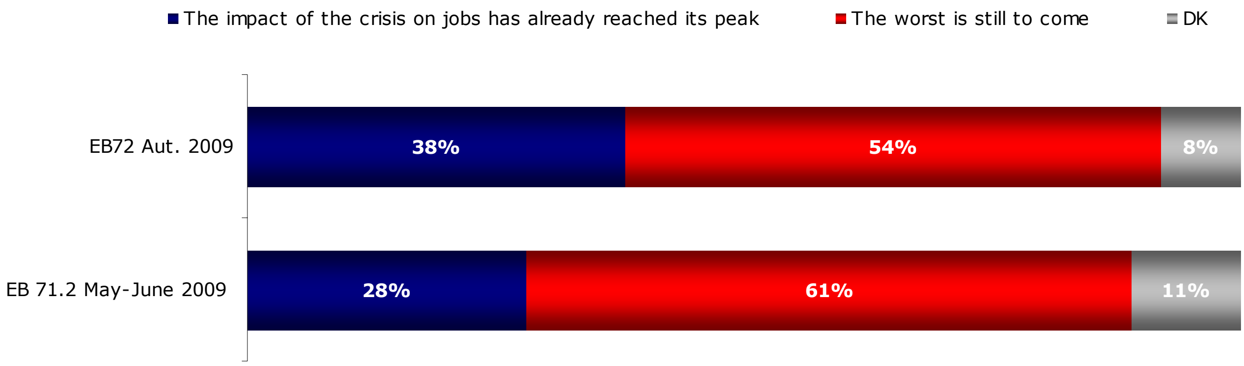
1. THE IMPACT OF THE ECONOMIC CRISIS

- More Europeans now feel that the worst is behind -

Over the course of the past few years, the Eurobarometer has closely monitored the impact of the economic crisis. As the crisis evolved, negative evaluations of the economic situation intensified. It now appears that the crisis has reached its peak and the recession has bottomed out although the full impact is still to come with unemployment expected to increase further[5]. This latest survey measures the public's state of mind at the tail-end of the economic crisis.

Even if the feeling that the worst is still to come continues to dominate public opinion, the latest results reveal some signs of renascent optimism among Europeans[6]. Compared to May-June 2009 more Europeans now express the view that the crisis and its impact on jobs has reached its peak (38%, up from 28%).

QC1 [...] Which of the 2 statements is closer to your opinion? - %EU



This slightly brighter outlook is evident throughout the EU with the most significant positive developments occurring in Sweden (+26), and Estonia (+20)[7]. An outright majority in Sweden (71%), Denmark (53%) and the Netherlands (51%) now consider that the impact of the crisis on jobs has reached its peak.

Yet the view that the worst is still to come prevails in the majority of Member States and remains the dominant view among most segments of European society.
It goes without saying that the crisis is hitting the more vulnerable segments of society such as the unemployed and the less skilled more than Europeans who enjoy a high standard of living (i.e. longer-educated people and managers).

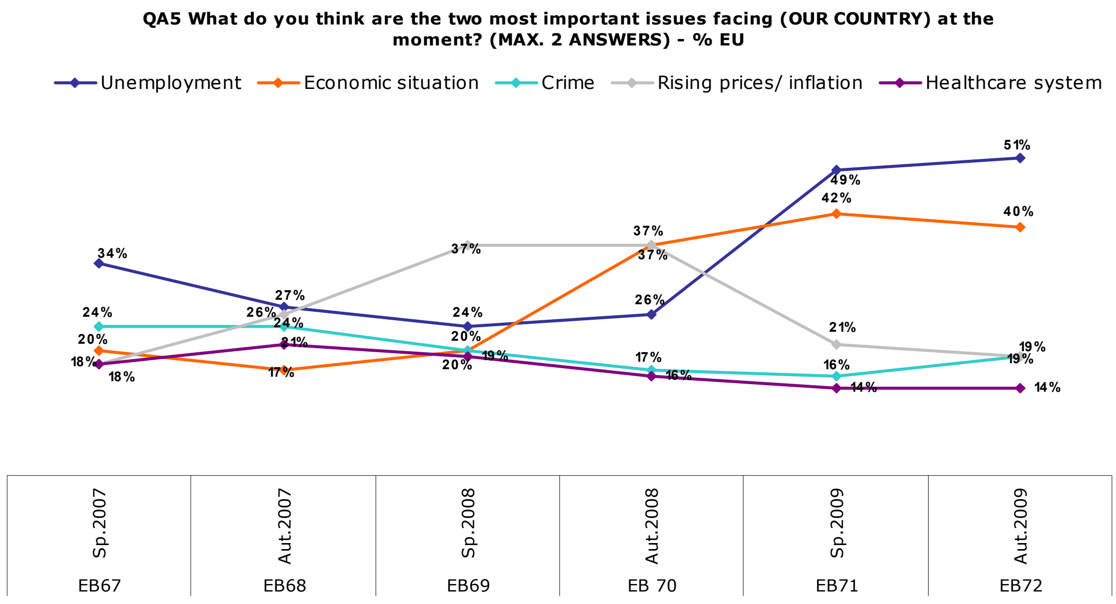
[5] European Economic Forecast – autumn 2009:
http://ec.europa.eu/economy_finance/publications/publication16055_en.pdf
[6] QC1 Some analysts say that the impact of the economic crisis on the job market has already reached its peak and things will recover little by little. Others, on the contrary, say that the worst is still to come. Which of the two statements is closer to your opinion?
[7] Cyprus is the only Member State where compared to spring 2009 fewer respondents now feel that the economic crisis has reached its peak (-3). Small – non-significant – shifts are noted in Spain (-1) and Lithuania and Romania (each +2).

2. CONCERNS OF EUROPEAN CITIZENS

- Unemployment remains the main concern in the European Union -

In autumn 2009 around half of Europeans consider unemployment to be the most important issue that their country faces (51%; +2) whilst concern about the economic situation is down somewhat since spring 2009 (from 42% to 40%)[8]. These findings seem to confirm the common perception that there will be a gap between the recovery of the economy and the moment where the labour market will recover as well.

An analysis of how attitudes have evolved over the period of economic downturn further confirms this level of awareness. At the height of the economic 'feel-good factor'[9] in spring 2007 (EB67), concerns about crime and healthcare were voiced nearly as often as concerns about the economic situation and unemployment. At the same time, economic prosperity led to increased concerns about inflation and rising prices. As the mood shifted to the 'feel-bad' factor, so did the focus of concerns and by autumn 2008 the economic situation and rising prices and inflation were the two most frequently mentioned issues. Six months later, at the height of the recession, concerns about unemployment had increased dramatically and Europeans mainly had economic issues on their minds while crime, the healthcare system and even inflation were considered less important for their country.



The extent to which **unemployment** is a primary concern is evident from the fact that it is the top national concern in 19 Member States, compared to 18 in spring 2009.

[8] QA5 What do you think are the two most important issues facing (OUR COUNTRY) at the moment? (MAX. 2 ANSWERS).
[9] The 'economic feel good factor' refers to how good consumers feel about the economy which in turn affects their consumption habits. In this report, economic feel good/bad factor has an extended meaning and refers to its extended impact on opinions on questions other than economic issues.

Estonia (68%) heads the list, followed by Spain (66%), Latvia, Lithuania and Slovakia (each 64%). In these countries, the actual unemployment rate is far above the EU average[10]. The largest increases in the level of concern about unemployment since spring 2009 have been recorded in Lithuania (+11) and Bulgaria (+10).

The economic situation is still the top national concern in six Member States, one fewer than in spring 2009. Respondents in Greece (60%) are most likely to mention this issue but it is also the top concern in the Czech Republic, Romania (each 53%), Bulgaria (51%), the Netherlands (50%) and Cyprus (43%). Although it is not the top concern, the proportion of respondents citing this issue is just as high in Spain (55%), Estonia (53%), Slovenia (52%), Hungary (51%), Ireland and Latvia (each 50%).

Since spring 2009, the proportion of Europeans who consider the economic situation to be an "important issue" at national level has decreased in 16 Member States, most dramatically so in Sweden (-13). At the same time, in six Member States concern about the economic situation has increased: Cyprus (+13), Spain (+10), the Czech Republic, Greece (each +8), Portugal and Romania (each +3) [11].

Outside these two issues, we see several country-specific features:

- **Crime** is the most frequently mentioned concern in Denmark (39%) and is also frequently mentioned in Cyprus, the UK (each 36%) and Bulgaria (33%).

- **Inflation** is the main concern in Malta (41%) and is the second highest-scoring issue in Romania (39%).

- **Immigration** is not the main issue in any of the EU Member States. It is still an important concern in Malta (34%) but it is no longer the top concern and now comes in second place.

- **Healthcare** continues to be a widespread concern in Finland, coming in second place (35%) after unemployment (58%).

- As observed in previous surveys, **the environment** is seldom seen as an important national concern. The highest scores for this topic are recorded in Sweden (20%), Denmark (16%) and France (10%).

- The same observation applies to **energy** for which a score above 10% is recorded only in Malta (24%).

[10] Eurostat September 2009 Harmonised Unemployment Rate – Latvia: 19.7%; Spain: 19.3%; Lithuania: 13.8% (June 2009); Estonia: 13.3% (June 2009); Slovakia: 13.3%. EU27: 9.2%. Figures available on http://epp.eurostat.ec.europa.eu/portal/page/portal/eurostat/home.

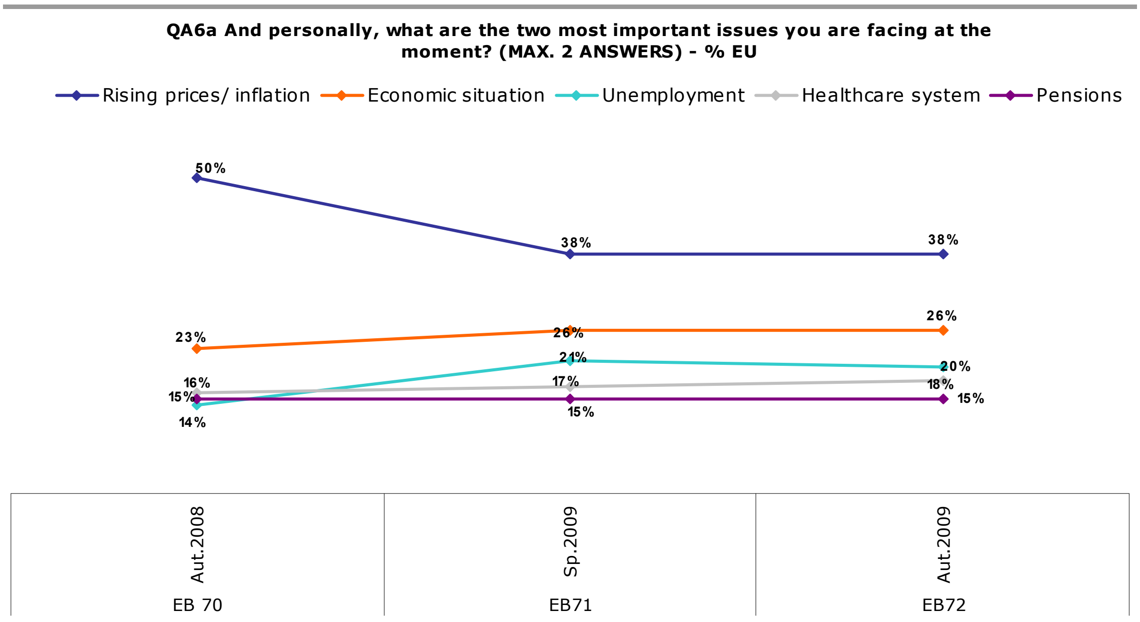
QA5 What do you think are the two most important issues facing (OUR COUNTRY) at the moment? (MAX. 2 ANSWERS)

	Unemployment	Economic situation	Crime	Rising prices/ inflation	Healthcare system	Immigration	Pensions	Taxation	The educational system	Housing	Terrorism	The environment	Energy	Defence/ Foreign affairs
EU27	51%	40%	19%	19%	14%	9%	9%	8%	7%	5%	4%	4%	3%	2%
BE	**42%**	35%	15%	24%	3%	18%	18%	11%	4%	6%	2%	5%	8%	1%
BG	48%	**51%**	33%	25%	14%	1%	9%	3%	4%	1%	1%	1%	3%	1%
CZ	50%	**53%**	17%	22%	13%	4%	14%	5%	5%	7%	1%	2%	2%	1%
DK	36%	29%	**39%**	4%	24%	15%	2%	2%	14%	1%	9%	16%	4%	3%
DE	**58%**	46%	13%	16%	21%	4%	7%	7%	14%	*0%*	3%	4%	2%	1%
EE	**68%**	53%	19%	10%	22%	*0%*	6%	7%	3%	1%	*0%*	1%	3%	1%
IE	**61%**	50%	23%	14%	24%	2%	3%	8%	5%	3%	1%	2%	1%	*0%*
EL	46%	**60%**	22%	23%	7%	8%	4%	8%	6%	*0%*	5%	3%	*0%*	2%
ES	**66%**	55%	11%	10%	2%	6%	2%	6%	3%	7%	12%	2%	*0%*	2%
FR	**59%**	31%	16%	22%	11%	6%	14%	6%	8%	10%	2%	10%	1%	1%
IT	**45%**	41%	18%	31%	6%	10%	4%	15%	3%	3%	4%	3%	2%	1%
CY	31%	**43%**	36%	26%	6%	14%	4%	3%	5%	6%	1%	1%	2%	4%
LV	**64%**	50%	17%	6%	20%	4%	8%	11%	8%	1%	*0%*	*0%*	1%	*0%*
LT	**64%**	49%	19%	19%	7%	3%	7%	16%	3%	1%	1%	1%	7%	*0%*
LU	**52%**	29%	12%	24%	6%	8%	8%	4%	14%	21%	3%	4%	3%	2%
HU	**58%**	51%	12%	30%	16%	1%	9%	5%	3%	3%	1%	1%	3%	*0%*
MT	21%	32%	5%	**41%**	10%	34%	4%	8%	2%	2%	*0%*	8%	24%	*0%*
NL	32%	**50%**	21%	7%	26%	8%	19%	4%	11%	2%	3%	7%	3%	1%
AT	**43%**	36%	18%	28%	11%	17%	9%	7%	13%	2%	2%	5%	2%	2%
PL	**48%**	25%	10%	27%	34%	2%	15%	7%	4%	4%	1%	1%	4%	3%
PT	**57%**	36%	18%	29%	11%	1%	11%	10%	4%	2%	1%	1%	*0%*	2%
RO	36%	**53%**	23%	39%	13%	1%	9%	8%	4%	4%	1%	2%	1%	*0%*
SI	**56%**	52%	16%	19%	12%	1%	10%	10%	2%	4%	*0%*	2%	1%	7%
SK	**64%**	45%	20%	18%	13%	2%	10%	4%	4%	6%	1%	2%	3%	1%
FI	**58%**	27%	10%	9%	35%	11%	12%	10%	5%	2%	1%	7%	7%	2%
SE	**63%**	30%	14%	2%	26%	9%	6%	3%	16%	3%	1%	20%	6%	1%
UK	**38%**	28%	36%	8%	10%	29%	6%	5%	6%	8%	6%	2%	6%	5%

* In bold, the highest results per country; in italics the lowest results per country; the grey rectangle shows the highest results per value; the rectangle with black borders shows the lowest results per value.

- Impact of crisis is evident from the personal concerns voiced by Europeans -

Europeans worry less about how the economic crisis impacts them directly than they do about the consequences it has for their country as a whole[12]. Nonetheless, the impact of the crisis is evident when we look at how opinions have evolved over the past year. Whilst inflation remains the primary concern (38%), it lost ground sharply between autumn 2008 and spring 2009 (-12 points) when the number of Europeans who were personally worried about the economic situation and unemployment rose somewhat (+3 points and + 6 points, respectively). Even if the European economies are showing signs of recovery, concern about the economic situation (26%) and unemployment (20%) is as widespread as in spring 2009.



Inflation is still the predominant personal issue in the EU and it is the primary personal concern in 18 of the 27 Member States whereas in autumn 2008 the Netherlands and Sweden were the only exceptions. There are now nine Member States where either "the economic situation" or "the healthcare system" comes in first place (see below).

The **economic situation** is the primary concern in Greece (47%), Latvia (46%), Ireland (44%), Spain (42%), Estonia (34%) and Denmark (23%).

The **healthcare system** ranks highest in the minds of respondents in the Netherlands and Sweden (both 35%) and in Finland (32%).

Personal concerns about **unemployment** do not come in first place in any single EU country. However, they come in second place in Latvia (33%), Ireland, Spain (each 32%), Estonia (28%) and the UK (19%; shared second place with economic situation).

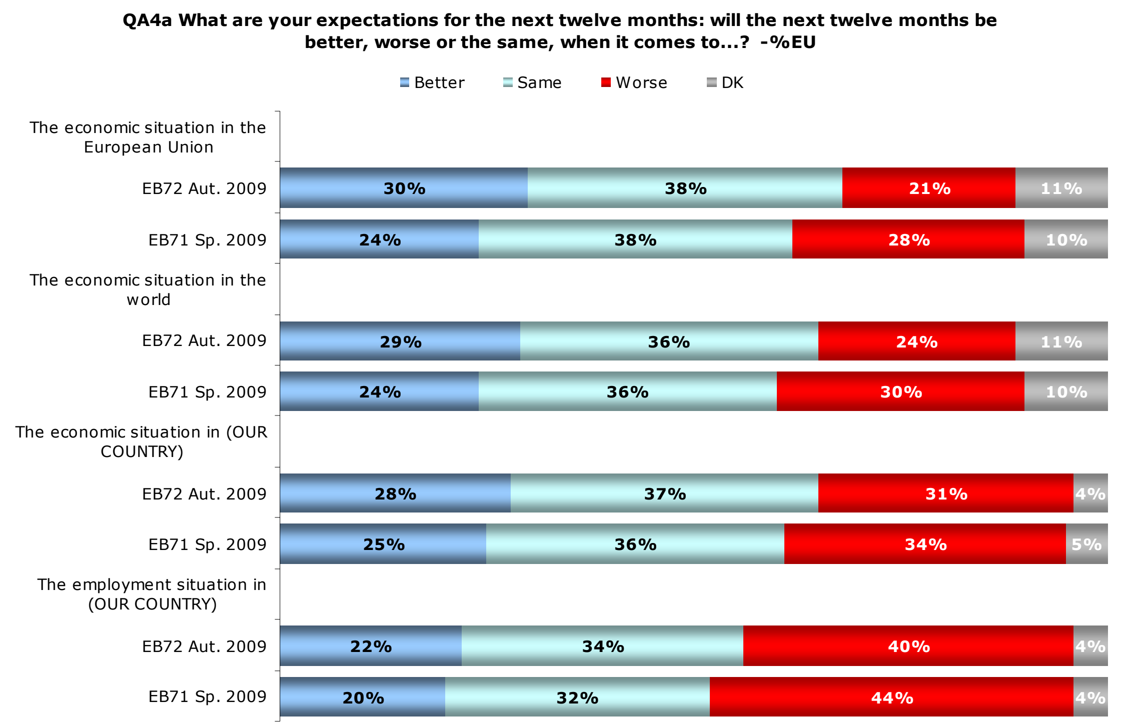
[12] QA6 And, personally, what are the two most important issues you are facing at the moment? (MAX.2 ANSWERS)

3. ECONOMIC EXPECTATIONS

- Europeans more positive about economic developments -

For the first time since autumn 2007, short-term expectations about the economic situation show a positive development, providing evidence that Europeans may be leaving the 'feel-bad' factor behind them[13].

Compared to spring 2009, more Europeans now believe that the next twelve months will be better when it comes to the European economy (30%; +6), the world economy (29%; +5) and the economic situation in their country (28%; +3). As regards the national employment situation, the expectation that it will get worse over the coming twelve months (40%; -4) largely continues to dominate.



[13] QA4a What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...? 2. The economic situation in (OUR COUNTRY). 4. The employment situation in (OUR COUNTRY). 6. The economic situation in the EU. 7. The economic situation in the world.

When we measure the situation in autumn 2009 by the index[14], the pessimistic outlook no longer prevails for all economic indicators. The index is still negative concerning **national employment** (-18 index points) and the **economic situation** (-3). However, positive scores are now noted for the **economic situation in the EU** (+9) and **in the world** (+5). For all four indicators, the "change-index" scores show that the trend is now more positive than it was in spring 2009.

Expectations for the next 12 months: INDEX 'BETTER – WORSE'

	Better - Worse Spring 2009 (EB71)	Better - Worse Autumn 2009 (EB72)	CHANGE INDEX Autumn 2009 – Spring 2009
Economic situation in the EU	**-4**	**+9**	***+13***
Economic situation in the world	**-6**	**+5**	***+11***
Economic situation in (OUR COUNTRY)	**-9**	**-3**	***+6***
Employment situation in (OUR COUNTRY)	**-24**	**-18**	***+6***

An examination of the changes in the index score at national level since spring 2009 further highlights the more positive economic outlook of Europeans.

- In all countries except from Malta and Cyprus, expectations regarding the European and world economies are now more positive than was the case in spring 2009.

- There are countries where large positive changes in the index scores are recorded for all four indicators. The Netherlands, Greece and Estonia top the list.

- The impact of the crisis is still felt more strongly in Central and Eastern Europe. In some of these countries as well as in Malta, the change index records large negative shifts.

[14] The index is calculated by deducting those who expect 'worse' from those who expect 'better'. The higher the index, the more positive is the overall situation in a country.

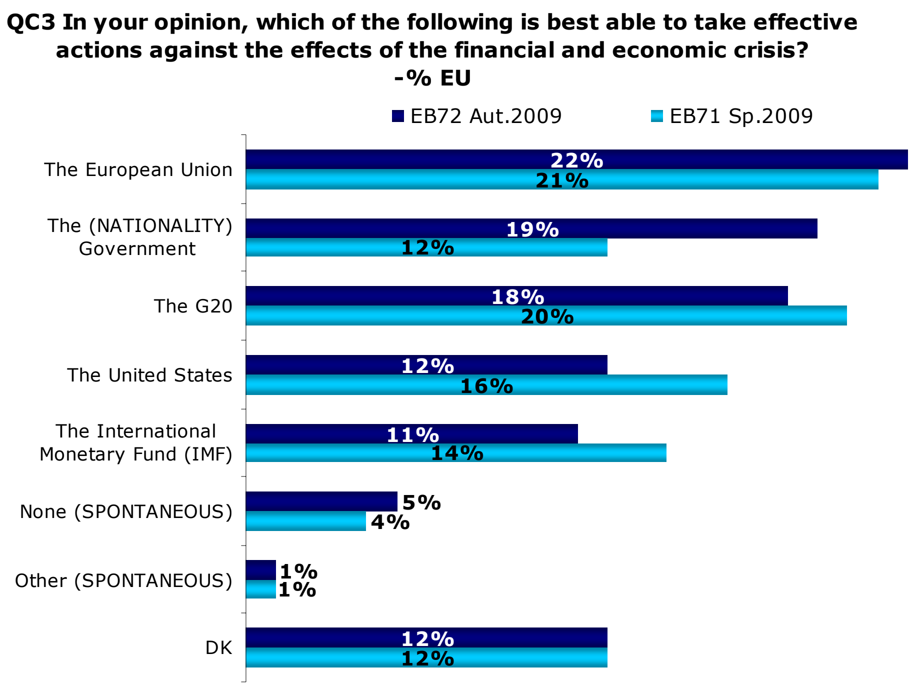
QA4 What are your expectations for the next 12 months: will the next 12 months be better, worse or the same, when it comes to...?
EXPECTATIONS FOR THE NEXT TWELVE MONTHS:
CHANGE IN INDEX AUTUMN 2009 (EB72) – SPRING 2009 (EB71)

The economic situation in the European Union		The economic situation in the world		The economic situation in (OUR COUNTRY)		The employment situation in (OUR COUNTRY)	
EU27	+13	EU27	+11	EU27	+6	EU27	+6
NL	+46	NL	+36	NL	+41	NL	+39
EL	+28	EL	+22	EE	+28	EL	+24
LU	+25	AT	+22	EL	+23	EE	+23
FI	+22	LT	+22	AT	+21	SE	+22
SE	+22	BG	+22	SE	+19	DK	+20
AT	+21	LU	+21	PT	+15	UK	+17
UK	+21	EE	+21	DK	+14	LU	+14
EE	+21	FI	+20	LU	+14	AT	+14
LV	+19	SE	+20	UK	+13	PT	+12
DK	+17	DK	+18	SK	+13	FI	+12
SK	+17	SK	+18	FI	+10	SK	+12
FR	+16	LV	+17	DE	+8	BE	+11
BG	+16	UK	+16	FR	+8	FR	+9
PT	+15	FR	+14	PL	+8	DE	+7
CY	+13	PT	+13	BG	+7	LV	+4
LT	+13	DE	+9	LV	+6	PL	+4
BE	+10	ES	+9	BE	+5	BG	-1
DE	+10	BE	+8	HU	+1	CZ	-2
IE	+9	IE	+8	IT	=	HU	-2
CZ	+9	CZ	+8	CZ	-1	IT	-4
PL	+7	PL	+7	SI	-2	ES	-5
RO	+7	RO	+7	ES	-5	IE	-5
SI	+6	SI	+6	RO	-7	CY	-5
ES	+5	HU	+5	IE	-8	SI	-7
IT	+5	IT	+3	LT	-12	MT	-13
HU	+4	MT	+1	CY	-13	RO	-13
MT	=	CY	=	MT	-18	LT	-14

4. WHO IS BEST ABLE TO FIGHT THE CRISIS?

- Europeans regain confidence in their national governments -

Now that the G20 and the IMF have given the necessary impetus on the road to economic recovery, national governments and the European Union are called to the task of fighting unemployment. The latest results show an increased expression of confidence among Europeans that their governments are best placed to take effective actions against the crisis (19%; +7) but the European Union is still the preferred actor (22%; +1)[15]. There is less reliance now on the G20 (18%; -2), the United States (12%; -4) and the International Monetary Fund (11%; -3).



The perception that national governments are best able to take effective actions against the effects of the crisis ranges from only 6% in the Czech Republic to 39% in Malta. Including Malta, it is the most widely expressed view in six Member States: Romania (38%), Bulgaria (32%), Ireland (29%), Austria and the UK (each 21%).

The EU is cited first in nine Member States: Greece (44%), Luxembourg, Poland (each 34%), Cyprus (32%), Portugal, Slovakia (each 30%), Spain, Lithuania (each 26%) and Italy (25%). The proportion of Europeans holding this view ranges from only 10% in the UK to 44% in Greece. Public opinion is divided in Estonia (25% for both the EU and the G20).

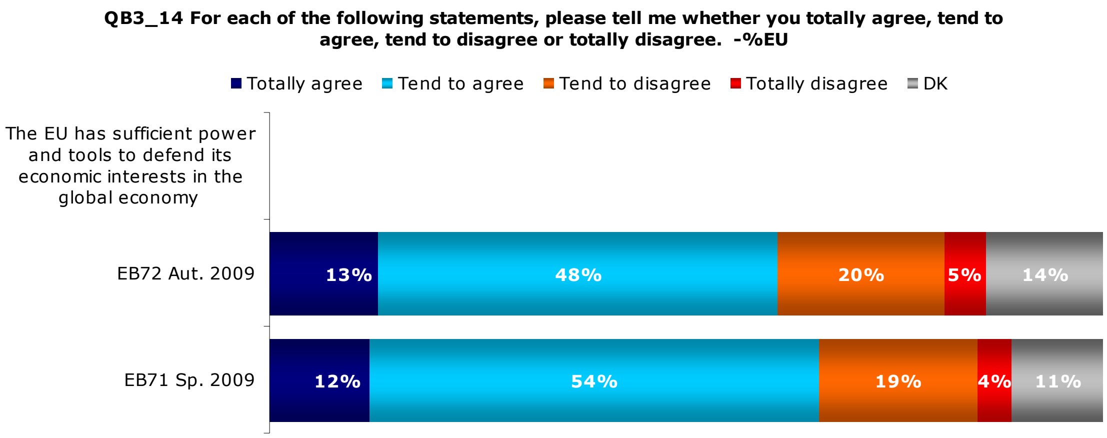
[15] QC3 In your opinion, which of the following is best able to take effective actions against the effects of the financial and economic crisis? (ROTATE) Respondents were allowed to give only one answer.

5. GLOBALISATION

- The EU supports its citizens in the effects of globalisation but there is a growing view that it lacks the power and tools to defend its interests in the global economy -

A large majority of respondents consider that the European Union has sufficient power and tools to defend its economic interests in the global economy[16] (61%, vs. 25% who disagree with this statement). However, this opinion has decreased since spring 2009 (down from 66% to 61%).

Nonetheless, it remains the majority opinion in all countries surveyed and is particularly pronounced in Slovakia (74%), Greece (70%) and in Denmark (69%). Respondents in Ireland (47%) and the UK (52%) are the least convinced.



The survey also examines how Europeans perceive the effects of globalisation. Because of its pluralistic nature, two differently worded statements – one worded positively and one worded negatively - are used to gauge public opinion. The sample is split, and a different version is put to each half[17].

QB3.15/16 For each of the following statements, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree. SPLIT A: The European Union helps to protect European citizens from the negative effects of globalisation SPLIT B: The European Union enables European citizens to better benefit from the positive effects of globalisation

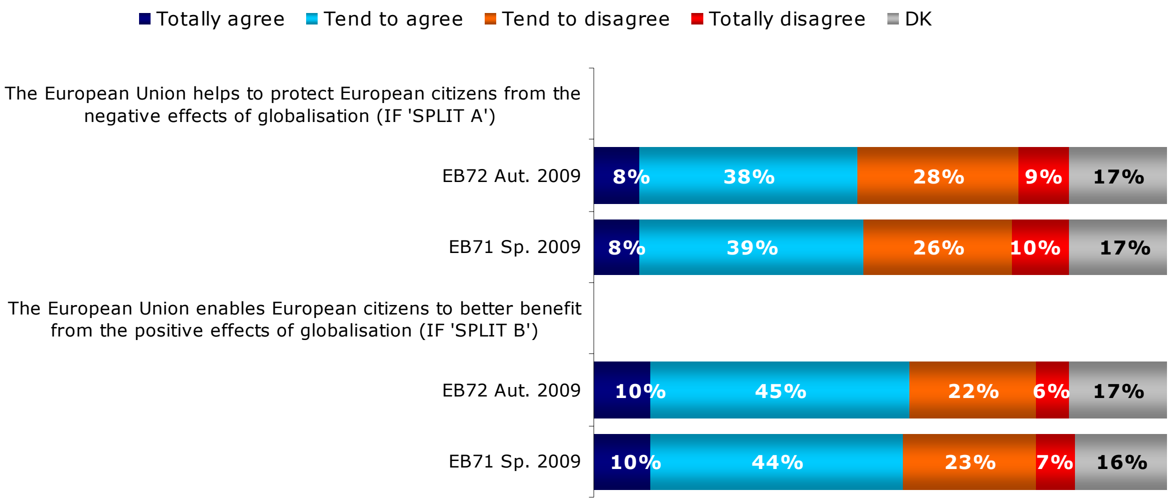
Regardless of how the question is worded, public opinion has remained stable since this question was last asked in spring 2009: the prevalent view is that the European Union supports its citizens when it comes to globalisation.

[16] QB3.14 For each of the following statements, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree. The EU has sufficient power and tools to defend its economic interests in the global economy.
[17] A technique known in opinion polling as "Split Ballot".

When the question is worded positively (SPLIT B), 55% of respondents believe the European Union enables them to better benefit from the positive effects of globalisation compared with 28% who disagree.

Respondents agree less often when the question wording focuses on the downside of globalisation, (SPLIT A): 46% believe that the European Union helps to protect them from the negative effects of globalisation compared with 37% who disagree.

QB3 For each of the following statements, please tell me whether you totally agree, tend to agree, tend to disagree or totally disagree. -%EU

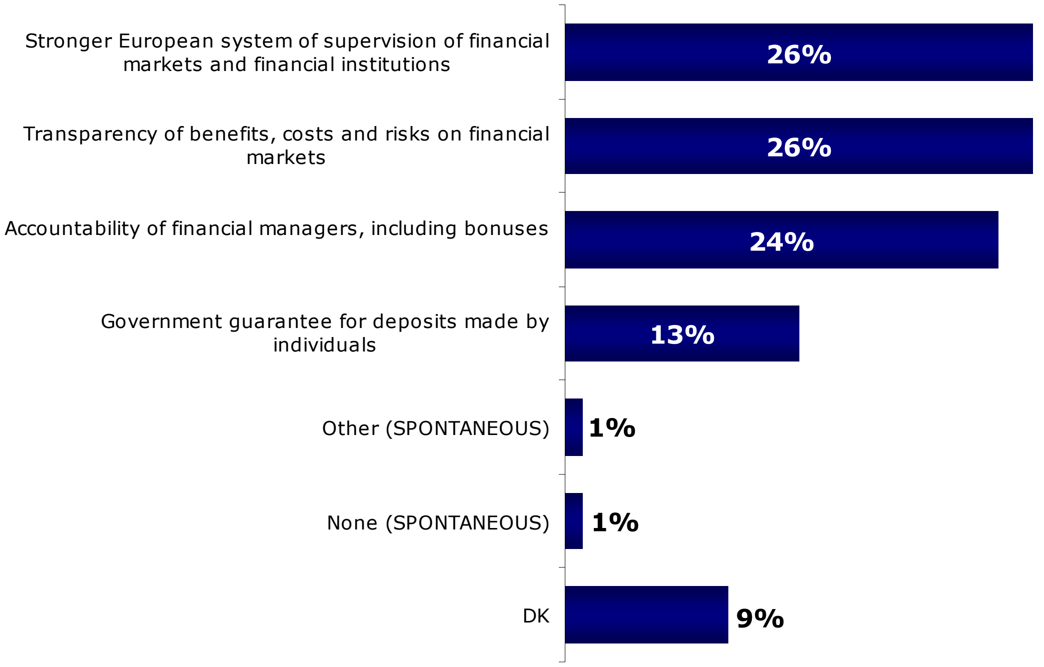


6. PRIORITIES FOR REFORM OF THE FINANCIAL SYSTEM IN THE EUROPEAN UNION

- A stronger European system of supervision tops the list in 14 Member States -

To prevent the recurrence of a similar crisis in the future, the financial system in the European Union needs to be reformed. How this should be done is a matter of discussion. Among the European public there appears to be a diversity of views, which reflects the many facets of the financial crisis and the wide ranging debate on appropriate political responses.[18]

QC10 From the following list of measures, which one should be given priority when it comes to reforming the financial system in the European Union?
- %EU



However, the results by country show a clearer ranking of priorities. In 14 Member States respondents regard a stronger European system of supervision of financial markets and financial institutions as the priority when it comes to reforming the financial system in the European Union. This opinion is most voiced in the Netherlands, Slovenia (45% each), Latvia and Sweden (44%). Germany is the only "big six" Member State where, of all possible methods of reform, respondents give first choice to this particular option (32%).

In six Member States (including France, Spain and Italy), respondents gave priority to the promotion of the transparency of benefits, costs and risks on financial markets: Greece (39%), France (37%), Estonia (34%), Denmark, Spain and Italy (29% each).

[18] QC10 From the following list of measures, which one should be given priority when it comes to reforming the financial system in the European Union? Respondents were allowed to give only one answer.

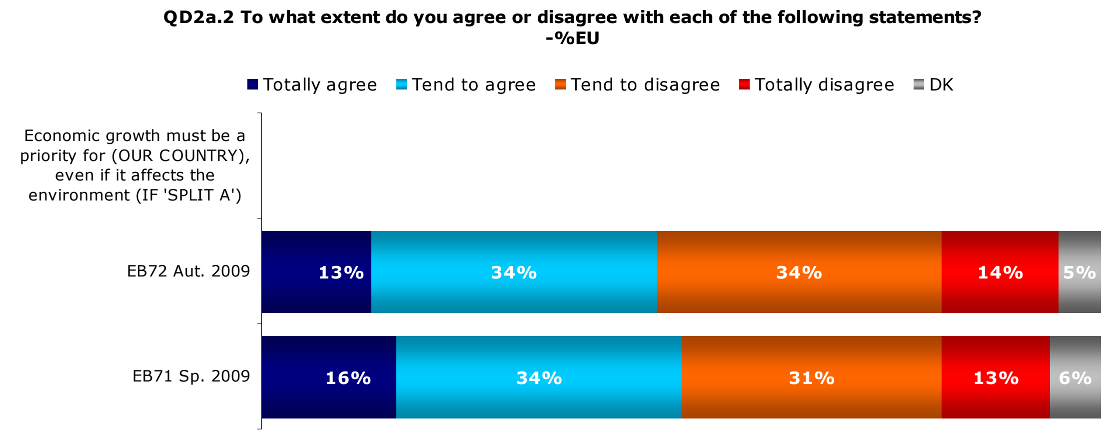
In six further countries (including Poland and the UK), the accountability of financial managers, including bonuses, is the perceived priority. This view is most strongly voiced by Hungarian respondents (50%) but is also popular in Ireland (38%), Poland (32%) and the UK (31%).

Finally, Austria is the only Member State where the most popular method of reform (28%) is a government guarantee for deposits made by individuals. Luxembourg (21%) and Cyprus (20%) are the only other two Member States where at least one fifth of respondents regard this as the priority for reforming the financial system in the European Union.

7. WAYS TO BOOST ECONOMIC GROWTH

- Equally split views on the alternative:
priority to economic growth or protection of the environment -

In Autumn 2009, just few weeks before the Copenhagen summit on climate change[19], 47% of Europeans agree with the statement that 'Economic growth must be a priority for (OUR COUNTRY), even if it affects the environment' vs. 48% who disagree[20]. European public opinion is divided, but this result should be analysed in comparison with spring 2009: when the economic recession was at its climax, 50% of Europeans agreed with this statement, vs. 44% who disagreed.



Behind this division of opinion at European level, there are strong differences between countries: in thirteen Member States, a majority of respondents would not prioritise economic growth in their country if it affected the environment. Respondents in Nordic countries, the Netherlands, Cyprus and Austria are the most resistant to this idea. However, in fourteen countries, the opposite opinion is the majority view, particularly in Hungary, Ireland and Romania.

[19] 7-18 December 2009: http://unfccc.int
[20] QD2a.2, question asked to half of the sample. To what extent do you agree or disagree with each of the following statements? Economic growth must be a priority for (OUR COUNTRY), even if it affects the environment

QD2a.2 To what extent do you agree or disagree with each of the following statements?

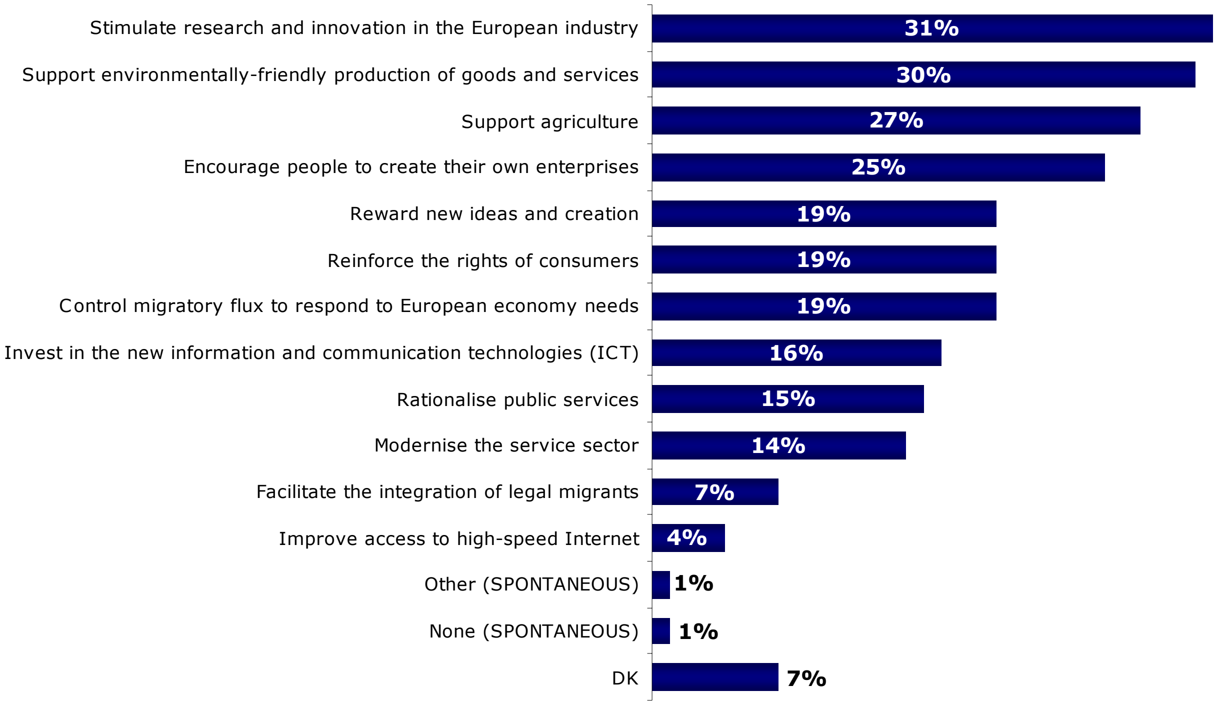
- "Economic growth must be a priority for (OUR COUNTRY), even if it affects the environment" (IF 'SPLIT A')

	COUNTRY	EB71 Index 'total agree'-'total disagree'	EB72 Index 'total agree'-'total disagree'	Diff.Index EB72-EB71
	EU27	+6	-1	-7
Majority "pro-economic growth"	HU	+35	+44	+9
	IE	+43	+29	-14
	RO	+30	+25	-5
	SK	+21	+19	-2
	PT	+17	+16	-1
	PL	+19	+14	-5
	IT	+30	+13	-17
	LT	-2	+12	+14
	BE	+13	+9	-4
	UK	+17	+6	-11
	BG	+14	+5	-9
	ES	+4	+5	+1
	MT	+8	+4	-4
	LU	-18	+3	+21
Majority "pro-environment"	CZ	-16	-3	+13
	EE	-7	-5	+2
	LV	+15	-6	-21
	SI	+9	-9	-18
	EL	-27	-12	+15
	FR	-3	-13	-10
	DE	-14	-16	-2
	SE	-3	-22	-19
	DK	-22	-28	-6
	AT	-26	-31	-5
	CY	-29	-37	-8
	NL	-35	-41	-6
	FI	-38	-43	-5

- Economic growth and environmentally friendly actions are not necessarily mutually exclusive priorities -

Overall, it seems that the relative indecision of European public opinion noted above can be explained by the fact that a large proportion considers that economic growth and the environment should not necessarily be mutually exclusive: when asked which aspects should be prioritised in order to boost growth in a sustainable way[21], 30% opt for support for the environmentally-friendly production of goods and services in second place, just behind the stimulation of research and innovation in European industry (31%). They consider that protecting the environment through the environmentally-friendly production of goods and services can have a positive impact on the economy.

QG4 In order to boost growth in a sustainable way, which of the following aspects should be prioritised in the European Union? (MAX. 3 ANSWERS) - %EU



The preference for stimulating research and innovation in European industry receives top mention in eleven Member States, including four of the "big six": Sweden (48%), the Netherlands (46%), Germany (42%), France and Luxembourg (each 38%), Ireland (37%), Finland (35%), Malta (33%), Belgium (31%), Spain (30%) and Italy (27%).

[21] QG4 In order to boost growth in a sustainable way, which of the following aspects should be prioritised in the European Union? (ROTATE-MAX 3 ANSWERS)

However, in Sweden almost as many respondents selected the environmentally-friendly option (47%). The same is the case in the Netherlands where the stimulation measure and the environmentally-friendly option are equally popular (each 46%). In Belgium, these two measures and agriculture are all equally popular (each 31%). Respondents in Cyprus (68%) are by far the most convinced of the benefits of the green economy on economic growth.

It is important to consider the perceived importance of agriculture in this regard. Particularly in many Eastern European countries, respondents believe that in order to boost growth in a sustainable way, agriculture should be prioritised in the European Union. Agriculture receives top mention in Romania (56%), Hungary (51%), Estonia (48%), the Czech Republic (47%), Bulgaria, Latvia (each 46%), Slovenia (40%), Portugal (39%) and Slovakia (34%).

Respondents in Lithuania voice a strong preference for entrepreneurship (48%) as a priority in order to boost growth in a sustainable way. It is also popular in the other Baltic States (Latvia: 42%; Estonia: 41%) and in Poland it is the most frequently preferred method, together with rationalising public services (each 31%).

In Malta an equal proportion of respondents believe "reinforcing the rights of consumers" and "stimulating research and innovation" (each 33%) is a priority.

Finally, UK respondents most often selected controlling the migratory flux to respond to European economic needs (29%) as a priority in order to boost growth. However, in Denmark and Austria (each 30%), this option is equally popular.

QG4 In order to boost growth in a sustainable way, which of the following aspects should be prioritised in the European Union?

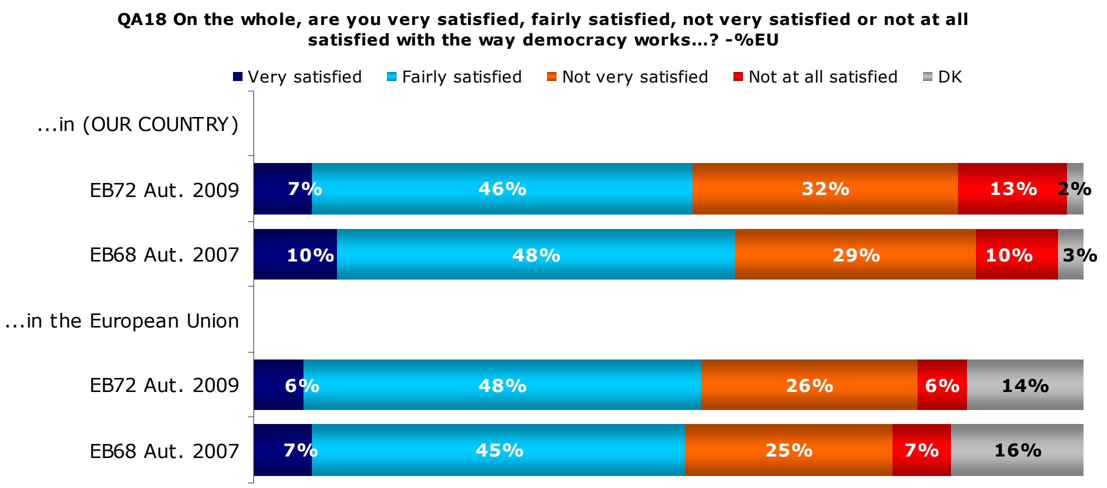
ITEM THAT RANKS FIRST	COUNTRY	SCORE
Stimulate research and innovation in the European industry	SE	48%
	NL	46%
	DE	42%
	FR	38%
	LU	38%
	IE	37%
	FI	35%
	MT	33%
	BE	31%
	ES	30%
	IT	27%
Support environmentally-friendly production of goods and services	CY	68%
	DK	46%
	NL	46%
	AT	40%
	EL	37%
	BE	31%
Support agriculture	RO	56%
	HU	51%
	EE	48%
	CZ	47%
	BG	46%
	LV	46%
	SI	40%
	PT	39%
	SK	34%
	BE	31%
Encourage people to create their own enterprises	LT	48%
	PL	31%
Control migratory flux to respond to European economy needs	UK	29%
Reinforce the rights of consumers	MT	33%
Rationalise public services	PL	31%

PART II: TREND INDICATORS

8. DEMOCRACY IN THE EUROPEAN UNION

- Europeans are satisfied with the way democracy works in the European Union -

In autumn 2009, satisfaction with the way democracy works in the European Union (54%, up from 52% since autumn 2007) is just above the level recorded for national democracies (53%, down from 58%)[22]. It should also be noted that the proportion that has no opinion about the EU is still much higher (14%) than for the national level (2%).



In all Member States, a majority express satisfaction with the way democracy works in the European Union even if the intensity varies greatly, ranging from 40% in the UK to 75% in Luxembourg.

In comparison with autumn 2007,levels of satisfaction with the way democracy works in the European Union have improved by at least four percentage points in 13 Member States, with the largest positive shifts noted in Luxembourg (+20), Bulgaria, Cyprus and Slovakia (each +13). Perceptions are now less positive in Slovenia (-9), Poland, Spain (each -7), Belgium (-5) and Latvia (-4).

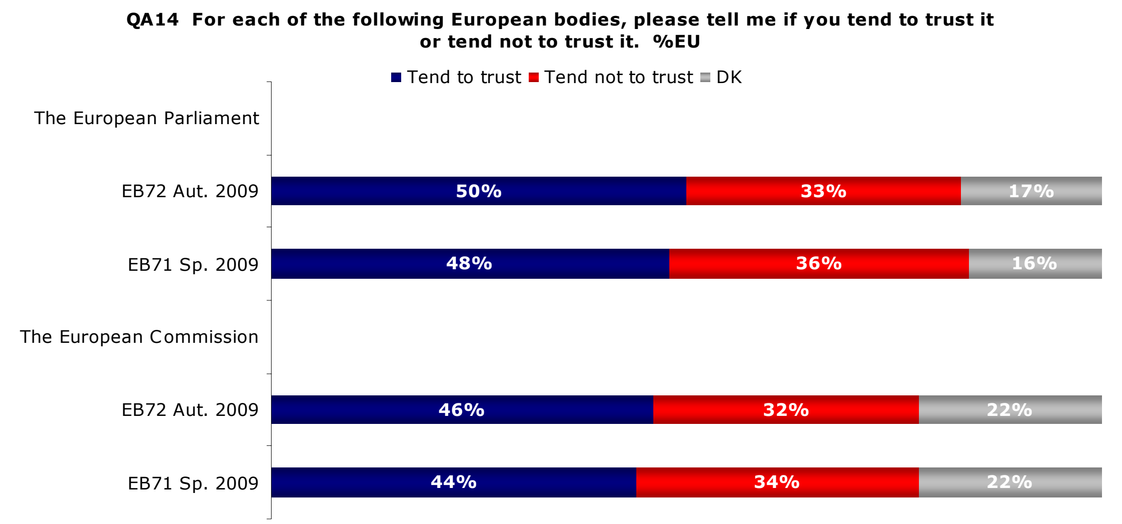
[22] QA18 On the whole, are you very satisfied, fairly satisfied, not very satisfied or not at all satisfied with the way democracy works a) in (OUR COUNTRY) b) in the European Union?

9. TRUST IN THE EUROPEAN INSTITUTIONS

- Improved trust in the European institutions –

Having examined satisfaction with democracy in the European Union, we move on to look at trust in two European institutions: the European Commission and the European Parliament[23]. During the period of economic downturn, the question arose as to whether the trust Europeans have in these institutions would decrease, or whether instead they would rely on them more, as a possible defence against the crisis.

Following a decrease between autumn 2008 and spring 2009; the latest results point to a slight renewal of trust in the European Parliament (50%; +2) and the European Commission (46%; +2) bringing it back to the autumn 2008 level (51% and 47%, respectively).



The European Parliament

As in spring 2009, respondents in Slovakia are the most likely to express trust in the European Parliament (71%) which is surprising because this country had the lowest turnout of all Member States at the 2009 European elections (19.6%). The UK has the lowest trust levels (25%) – well below Latvia (41%).

Compared to spring 2009, trust has increased significantly in the Czech Republic (+11). The next most positive evolutions are noted in Portugal (+6) and Luxembourg (+5). On the contrary, trust has decreased in Malta (-6).

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[23] QA14 For each of the following European bodies, please tell me if you tend to trust it or tend not to trust it. 1. The European Parliament; 2. The European Commission.

The European Commission

Trust in the European Commission in the Member States ranges from 21% in the UK to 64% in Slovakia.

The most positive evolutions in the Member States are recorded in the Czech Republic (+13), Bulgaria and Greece (each +7).

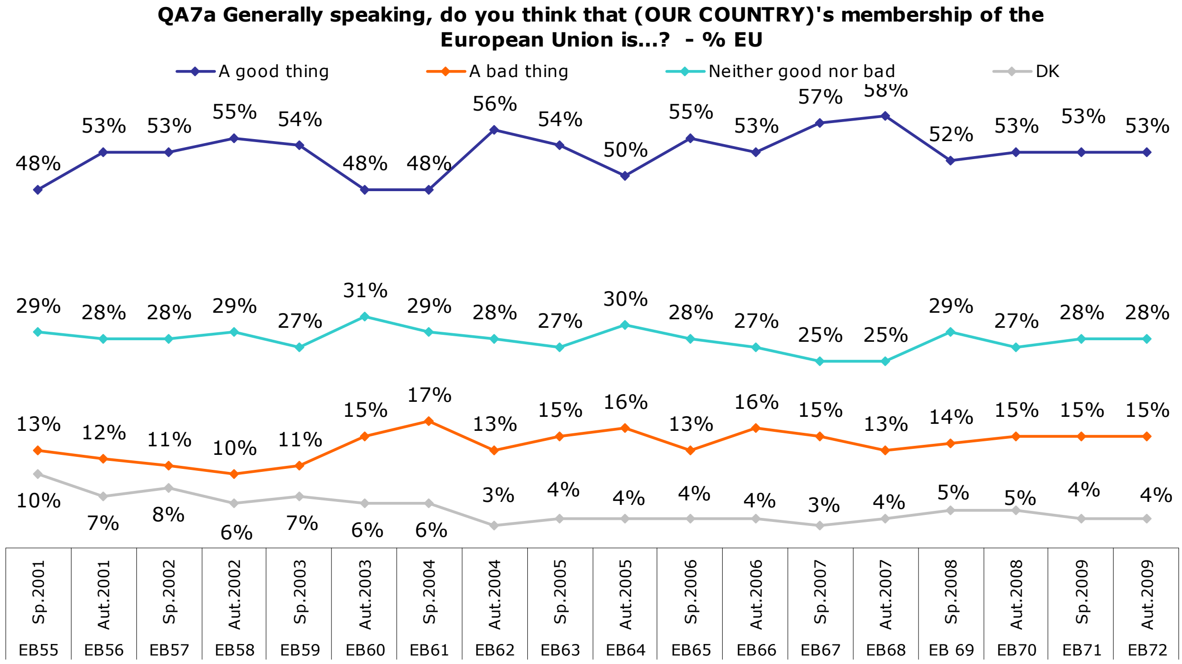
QA14. For each of the following European bodies, please tell me if you tend to trust it or tend not to trust it.
- % Tend to trust

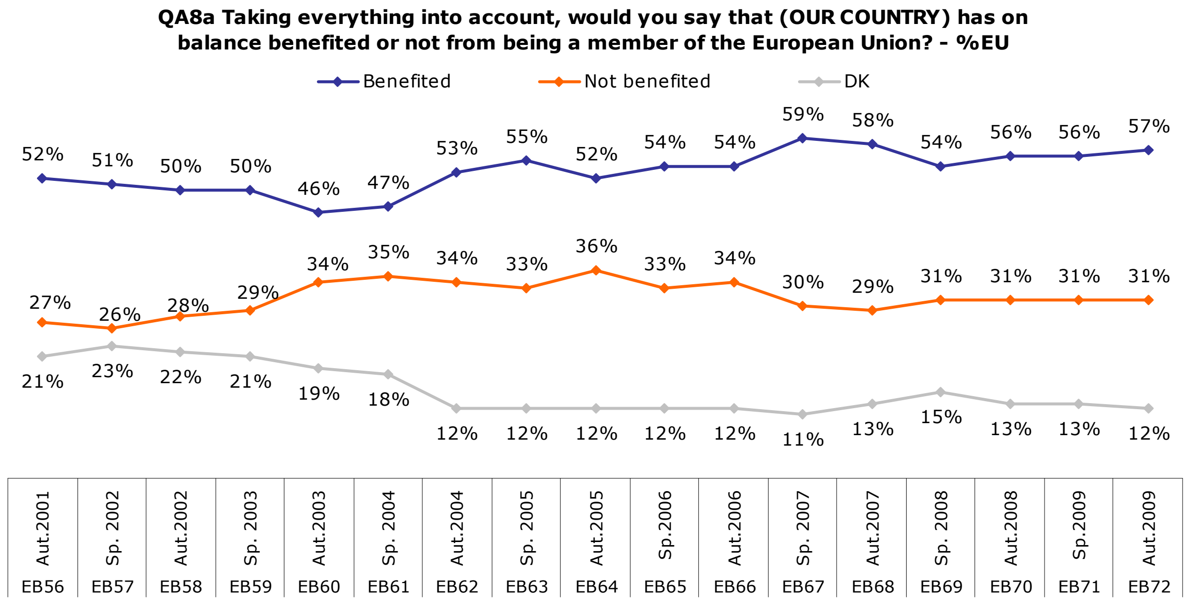
The European Parliament	EB71 Sp.2009	EB72 Aut.2009	Diff.	The European Commission	EB71 Sp.2009	EB72 Aut.2009	Diff.
EU27	**48%**	**50%**	**+2**	**EU27**	**44%**	**46%**	**+2**
CZ	49%	60%	**+11**	CZ	46%	59%	**+13**
PT	57%	63%	**+6**	BG	52%	59%	**+7**
LU	61%	66%	**+5**	EL	51%	58%	**+7**
BG	61%	65%	**+4**	ES	44%	50%	**+6**
EL	56%	60%	**+4**	LU	53%	59%	**+6**
ES	49%	53%	**+4**	CY	51%	56%	**+5**
CY	53%	57%	**+4**	PT	56%	61%	**+5**
AT	50%	54%	**+4**	RO	53%	58%	**+5**
SK	67%	71%	**+4**	HU	50%	54%	**+4**
HU	57%	60%	**+3**	LV	35%	38%	**+3**
RO	62%	65%	**+3**	AT	43%	46%	**+3**
FI	58%	61%	**+3**	SK	61%	64%	**+3**
UK	22%	25%	**+3**	EE	60%	62%	**+2**
EE	63%	65%	**+2**	NL	59%	61%	**+2**
NL	58%	60%	**+2**	DE	42%	43%	**+1**
DK	63%	64%	**+1**	IT	50%	51%	**+1**
IE	53%	54%	**+1**	FI	56%	57%	**+1**
IT	53%	54%	**+1**	IE	51%	51%	**=**
LV	40%	41%	**+1**	LT	49%	49%	**=**
PL	50%	51%	**+1**	DK	56%	55%	**-1**
SE	56%	57%	**+1**	PL	49%	48%	**-1**
DE	49%	48%	**-1**	SI	47%	46%	**-1**
FR	46%	44%	**-2**	UK	22%	21%	**-1**
LT	54%	52%	**-2**	FR	41%	39%	**-2**
SI	48%	46%	**-2**	SE	51%	49%	**-2**
BE	65%	62%	**-3**	BE	62%	58%	**-4**
MT	64%	58%	**-6**	MT	59%	55%	**-4**

10. EU MEMBERSHIP

- Support for and perceived benefits of EU membership remain stable -

The latest results show no change at EU level since spring 2009: membership of the European Union is seen as a good thing by 53% whilst only 15% of Europeans consider their country's membership as a bad thing[24]. Perceptions of the benefits of EU membership in general are also stable: 57% of Europeans think that their country has on balance profited from membership (+1) whilst 31% feel their country has not benefited[25].





[24] QA7a Generally speaking, do you think that (OUR COUNTRY)'s membership of the European Union is...?
[25] QA8a Taking everything into account, would you say that (OUR COUNTRY) has on balance benefited or not from being a member of the European Union?

In Greece, Malta, Spain and Lithuania the evolution since spring 2009 is far from stable for both indicators of support. In Greece the change is positive, while it is negative in Malta, Spain and Lithuania.

QA7a Generally speaking, do you think that (OUR COUNTRY)'s membership of the European Union is...?
- % "A good thing"

	EB71 Sp.2009	EB72 Aut.2009	Diff.
EU27	**53%**	**53%**	**=**
EL	45%	61%	**+16**
.	.	.	.
.	.	.	.
.	.	.	.
LU	79%	74%	**-5**
LT	57%	51%	**-6**
ES	71%	64%	**-7**
MT	57%	45%	**-12**

QA8a Taking everything into account, would you say that (OUR COUNTRY) has on balance benefited or not from being a member of the European Union?
- % "Benefited "

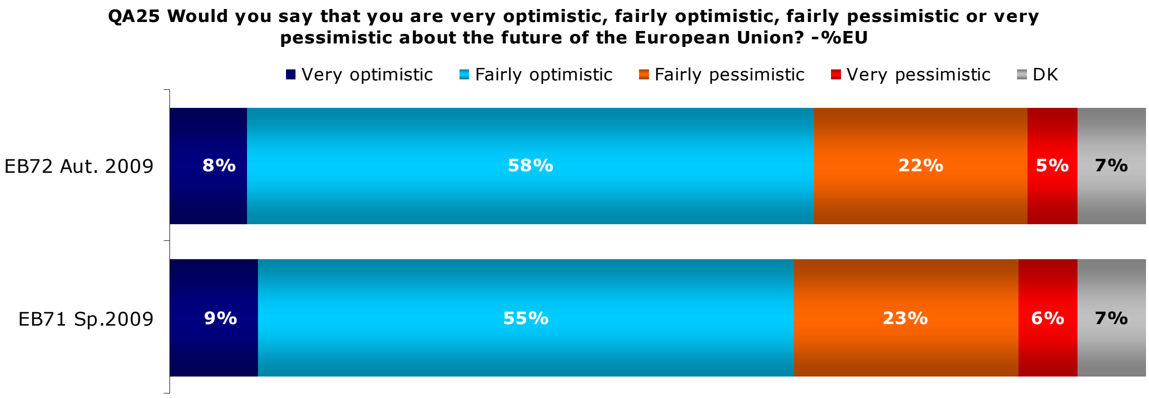
	EB71 Sp.2009	EB72 Aut.2009	Diff.
EU27	**56%**	**57%**	**+1**
SE	47%	55%	**+8**
EL	64%	71%	**+7**
.	.	.	.
.	.	.	.
.	.	.	.
ES	70%	66%	**-4**
CY	54%	50%	**-4**
LT	71%	66%	**-5**
MT	67%	59%	**-8**

The feeling that their country has benefited from EU membership has increased most, however, in Sweden (+8). In addition, support for EU membership is now lower in Luxembourg (-5) and the perception of the benefits of membership is lower in Cyprus (-4). All other national shifts since spring 2009 lie within a +3/-3 point band.

11. THE FUTURE OF THE EUROPEAN UNION

- Two in three Europeans are optimistic about the future of the EU -

Two in three Europeans (66%) say they are optimistic about the future of the European Union (+2), whilst just over a quarter (27%; -2) say they are pessimistic[26].



The sense of optimism about the future of the European Union is evident from the finding that in every Member State an outright majority of respondents have a positive outlook. The proportion that is optimistic about the future ranges from 50% in the UK to 79% in Denmark and the Netherlands. In four countries optimism about the future has declined: Malta and Cyprus (each -7), Ireland (-5) and Lithuania (-4). Overall, however, the evolution since spring 2009 is positive, with the greatest improvements in public opinion noted in Greece (+16), Luxembourg (+12) and Portugal (+10).

[26] QA25 Would you say that you are very optimistic, fairly optimistic, fairly pessimistic or very pessimistic about the future of the European Union?

CONCLUSION

This standard Eurobarometer was carried out in autumn 2009, at a time when the first signs of economic recovery began to appear after two difficult years. The crisis has had an immense impact on Europeans and has greatly affected European public opinion in all areas of life. This survey shows an improving public mood but the scars remain:

- **Compared to spring 2009 many more Europeans now express the view that the crisis has reached its peak**. Even if the feeling that the worst is still to come continues to dominate public opinion, the survey reveals signs of optimism among Europeans.

- **Unemployment is the main concern of Europeans** for their country, whilst concerns about the economic situation have lessened somewhat.

- **The economic 'feel-bad' factor appears to be fading: for the first time since autumn 2007, short-term expectations about the economic situation are moving in a positive direction.** However, the expectation that the national employment situation will worsen continues to dominate public opinion.

- Now that the G20 and the IMF have given the impetus for economic recovery, **national governments and the European Union are called to the task of fighting the crisis**.

- **Europeans believe that the EU offers adequate support to address the effects of globalisation**. However, the view that the European Union has sufficient power and tools to defend its economic interests in the global economy has declined somewhat, though it is still held by a clear majority.

- There is no clear consensus about how the financial system in the European Union should be reformed. Having a stronger European system of supervision, more transparency in the financial markets and more accountability of financial managers, including bonuses are cited by comparable proportions of Europeans on average.

- Views are almost equally split on the priority to give to the protection or the environment or to growth. This relative indecision of European public opinion can be explained by the fact that a large proportion consider that **economic growth and the environment are not necessarily mutually exclusive**.

The main developments in European public opinion in autumn 2009 on the European Union and its institutions are as follows:

- **The EU is seen as a democratic level of public action.** In autumn 2009, satisfaction with the way democracy works in the European Union is just above the level recorded for national democracies. Europeans less often voice dissatisfaction about the way democracy works in the EU than about the way it works in their country. However, the proportion that has no opinion about the EU is still much higher than for the national level, indicating that the EU is still considered somewhat remote.

- **Trust in the European institutions has improved slightly**: the survey reveals a moderate but positive evolution for the European Parliament and the European Commission. **Support for EU membership remains stable.** An outright majority of Europeans consider that their country's membership of the EU is a good thing and are convinced that their country has benefited from being a member of the Union.

- **There is broad optimism among Europeans about the future of the EU**. This sense of optimism is evident from the finding that in every Member State an outright majority of respondents have positive expectations.

*   *   *

TECHNICAL SPECIFICATIONS

Between the 23rd of October and the 18th of November 2009, TNS Opinion & Social, a consortium created between TNS plc and TNS opinion, carried out wave 72.4 of the EUROBAROMETER, on request of the EUROPEAN COMMISSION, Directorate-General for Communication, "Research and Political Analysis".

The EUROBAROMETER 72.4 is the "STANDARD EUROBAROMETER 72" and covers the population of the respective nationalities of the European Union Member States, resident in each of the Member States and aged 15 years and over. The STANDARD EUROBAROMETER 72 has also been conducted in the three candidate countries (Croatia, Turkey and the Former Yugoslav Republic of Macedonia) 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.

ABBR.	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+
BE	Belgium	TNS Dimarso	1.006	30/10/2009	17/11/2009	8.866.411
BG	Bulgaria	TNS BBSS	1.008	29/10/2009	09/11/2009	6.584.957
CZ	Czech Rep.	TNS Aisa	1.056	30/10/2009	13/11/2009	8.987.535
DK	Denmark	TNS Gallup DK	1.006	24/10/2009	17/11/2009	4.503.365
DE	Germany	TNS Infratest	1.514	30/10/2009	15/11/2009	64.545.601
EE	Estonia	Emor	1.002	23/10/2009	16/11/2009	916.000
IE	Ireland	TNS MRBI	1.011	30/10/2009	15/11/2009	3.375.399
EL	Greece	TNS ICAP	1.000	28/10/2009	15/11/2009	8.693.566
ES	Spain	TNS Demoscopia	1.020	30/10/2009	17/11/2009	39.059.211
FR	France	TNS Sofres	1.005	28/10/2009	16/11/2009	47.620.942
IT	Italy	TNS Infratest	1.036	30/10/2009	14/11/2009	51.252.247
CY	Rep. of Cyprus	Synovate	506	26/10/2009	15/11/2009	651.400
LV	Latvia	TNS Latvia	1.006	30/10/2009	16/11/2009	1.448.719
LT	Lithuania	TNS Gallup Lithuania	1.023	27/10/2009	11/11/2009	2.849.359
LU	Luxembourg	TNS ILReS	502	27/10/2009	15/11/2009	404.907
HU	Hungary	TNS Hungary	1.023	29/10/2009	15/11/2009	8.320.614
MT	Malta	MISCO	500	28/10/2009	14/11/2009	335.476
NL	Netherlands	TNS NIPO	1.004	29/10/2009	18/11/2009	13.017.690
AT	Austria	Österreichisches Gallup-Institut	1.030	27/10/2009	13/11/2009	6.973.277
PL	Poland	TNS OBOP	1.000	30/10/2009	15/11/2009	32.306.436
PT	Portugal	TNS EUROTESTE	1.025	29/10/2009	15/11/2009	8.080.915
RO	Romania	TNS CSOP	1.021	30/10/2009	11/11/2009	18.246.731
SI	Slovenia	RM PLUS	1.015	24/10/2009	15/11/2009	1.748.308
SK	Slovakia	TNS AISA SK	1.040	30/10/2009	15/11/2009	4.549.954
FI	Finland	TNS Gallup Oy	1.018	29/10/2009	18/11/2009	4.412.321
SE	Sweden	TNS GALLUP	1.032	26/10/2009	15/11/2009	7.723.931
UK	United Kingdom	TNS UK	1.322	30/10/2009	17/11/2009	51.081.866
TOTAL EU27			**26.731**	**23/10/2009**	**18/11/2009**	**406.557.138**
CY(tcc)	Turkish Cypriot Community	Kadem	500	02/11/2009	14/11/2009	143.226
HR	Croatia	Puls	1.000	27/10/2009	12/11/2009	3.749.400
TR	Turkey	TNS PIAR	1.002	27/10/2009	15/11/2009	52.728.513
MK	Former Yugoslav Rep. of Macedonia	TNS Brima	1.005	27/10/2009	02/11/2009	1.678.404
TOTAL			**30.238**	**23/10/2009**	**18/11/2009**	**464.856.681**

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