

# **Special Eurobarometer 349**

## **Social Climate**

Conducted by TNS Opinion & Social at the request  
of the European Commission's Directorate-General  
for Employment

Survey co-ordinated by the Directorate-General for  
Communication

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## INTRODUCTION AND METHODOLOGY

It will be several years before the social impact of the recession can be fully analysed, using solid evidence from surveys such as EU-SILC (European Union Statistics on Income and Living Conditions). However, a more immediate assessment can be made using opinion polls.

This report presents the results of a Eurobarometer survey on social climate, collecting views of some 1,000 people in each country<sup>1</sup>. This survey not only measures how Europeans perceive the current recession and its social impact, but also reveals interesting differences between countries which seem to reflect the strengths and weaknesses of national policies and institutions.

The first wave of this special Eurobarometer was conducted one year ago, eight months after the start of the financial and economic crisis. By June 2010, when the second wave was conducted, signs of economic improvement had been reported in certain Member States, but the overall position was still one of difficulty. In addition to the analysis of this year's survey, we compare the findings with last year's results. Have there been any significant changes in public opinion in certain countries over the last year? Have any new patterns emerged?

The social climate survey covers 15 areas and asks respondents to assess, for each of these areas, the current situation, how the situation has evolved over the past five years and how they expect it to change over the coming year – altogether forming a set of 45 variables. The 15 areas fall in three groups:

1. The first group concerns the **personal situation of the respondents** including their satisfaction with life in general, with the area where they live, with their personal job situation and with the financial situation of their households.
2. The second set covers the **general situation of the country** and includes the cost of living, the affordability of energy and of housing, the quality of public administration, and the general employment and economic situation.
3. The third set focuses on **social protection and social inclusion in the country** and contains questions on health care provision, pensions, unemployment benefits, the way inequalities and poverty are addressed and relations between people from different cultural or religious backgrounds.

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<sup>1</sup> 1000 per country except in Germany (1,500); United Kingdom (1,300); Luxembourg (500); Republic of Cyprus (500) and Malta (500).

Some of the 15 items tested in this survey correspond to long term trend questions of the Eurobarometer at personal level (life in general, financial situation of the household and personal job situation) and at country level (economic situation and employment situation). Only "current satisfaction with life in general" has been asked since 1973 in the context of Eurobarometer surveys (scale satisfied/not satisfied). The other items have been asked only since 1995 as expectations trends using another scale (better/worse).

First and foremost, in this report we analyse a mean index score, measured from +10 to -10, compared to the analysis of mean index scores and percentage scores seen in last year's report. This index score indicates the balance of opinion in each country, where +10 corresponds to the highest possible degree of satisfaction and -10 corresponds to the lowest. Scored in this manner, QA1 and QA2 represent the respondents' level of satisfaction with the current situation<sup>2</sup>.

For questions QA3 and QA4<sup>3</sup>, the survey measured expectations for the coming twelve months and how things have changed over the last five years. Here, a better-worse index is used, and we analyse the proportion of responses answering *better* (QA3)/*improved* (QA4), minus the proportion answering *worse* (QA3)/*got worse* (QA4): this index can potentially range from -100 to +100. A positive index means that the proportion of people who believe that things have got better/will get better outweighs the proportion of those who think things have got or will get worse. We also present the percentage of respondents who answered that things *will stay the same* (QA3)/ *stayed about the same* (QA4): this gives us an idea of the degree of belief that the situation has not changed over the last 5 years, or will stay the same during the next twelve months.

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<sup>2</sup> The indexes for the current situation (QA1 and QA2) are calculated at individual level and based on weighted data. In this calculation the answer categories were given a weight between 1 and 4: "very satisfied" / "very good" = 4, "fairly satisfied" / "rather good" = 3, "not very satisfied" / "rather bad" = 2 and "not at all satisfied" / "very bad" = 1. The answer category "don't know" was not taken into account. The new scale ranging between 1 and 4 was converted into a scale from -10 to +10.

<sup>3</sup> The better-worse index was created by calculating the difference in percentage points between the two extreme answer categories of QA3 ("better" - "worse") and QA4 ("improved" - "got worse"). This brings us to an index on a scale from -100 to +100. Please note that the neutral answer categories and the "don't know" responses were not taken into account when calculating this index. The overall results (in %), on the basis of which both indexes have been created, are annexed to this report.

This approach allows us to establish a single figure to describe the situation for each dimension tackled in the survey. Although a single figure gives us a good insight into the overall situation, it also simplifies a possibly very complex picture into a single score. For example, while a score approaching 0 could describe a situation in which about half of respondents were strongly dissatisfied and half strongly satisfied, it could equally indicate a large and balanced number of moderate responses. In this report, we therefore focus on these indexes and on evolutions for each index since the first wave of this report. For each dimension, we present one scorecard with the different results measured in this survey for the EU as a whole, and for each of the countries surveyed:

- Evaluation of the current situation (Q1 and Q2): the index measured in this wave / the evolution of the index since the previous wave (EB73.5-EB71.2).
- Situation compared with 5 years ago (Q4): the index measured in this wave / the proportion of respondents answering "the same" in this wave / the evolution of the index since the previous wave (EB73.5-EB71.2).
- Expectations for the coming 12 months (Q3): the index measured in this wave / the proportion of respondents answering "the same" in this wave / the evolution of the index since the previous wave (EB73.5-EB71.2).

\* \* \*

The results of this report come from the special Eurobarometer no 349 conducted by TNS Opinion & Social network between 9 and 30 June 2010. All interviews were conducted face-to-face in people's homes and in the appropriate national languages. The methodology is consistent with that used in Standard Eurobarometer polls managed by the European Commission's Directorate-General for Communication ('Public Opinion and Speechwriting' unit). A technical note on the manner in which interviews were conducted is appended as an annex to this report. This note indicates the interview methods and the confidence intervals.

To ensure that the sample is representative, all national results provided in this study are weighted according to standard socio-demographic characteristics. Scores for the EU average are weighted according to country size in order to ensure an accurate representation of public opinion in the EU.

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The Eurobarometer web site can be consulted at the following address:

[http://ec.europa.eu/public\\_opinion/index\\_en.htm](http://ec.europa.eu/public_opinion/index_en.htm)

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

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 Don't know

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

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



## 1. PERSONAL SITUATION

In this section, we examine levels of satisfaction with life in the various Member States, and other general indicators of respondents' personal situation. The survey includes four batteries of questions that help capture Europeans' opinions on this matter. Respondents' ratings of the current situation, whether they think it is better or worse than five years ago (the 'five-year comparison') and expectations for the coming twelve months are presented item by item, and compared with last year's findings.

Sections of this report frequently draw a distinction between countries: this has been done on a purely geographical basis and no political conclusions are intended to be drawn from this analysis.

### *1.1 General life situation (QA1; QA4\_1; QA3\_1<sup>4</sup>)*

When asked to consider the general life situation, a significant number of the respondents felt as if the situation had remained the same as during the period that the last survey was taken. There is a feeling that the situation has worsened slightly over the last five years; but there is also some optimism that the situation will improve over the next twelve months.

Most respondents are satisfied with their current situation. The positive index of 3.1 at EU level indicates that Europeans are generally satisfied with the life they live. However, when they evaluate how their situation has changed over the last five years, the index score of -5 indicates that they feel that their situation has worsened: it seems that the economic turbulence of the last couple of years has affected public opinion. Finally, when it comes to short-term expectations, the index of +9 tells us that optimism is more prevalent than pessimism: a relative majority of Europeans expect things to improve.

In terms of evolutions, all three indexes are declining, but only slightly, and therefore the situation is quite stable: evaluation of the current situation (-0.1); situation compared with 5 years ago (-2); expectations for the coming twelve months (-1).





























The situation is relatively stable at EU level, but the general pattern is downward, despite the fact that the survey was conducted at a time when signs of economic recovery were seen. This relative stability at EU level masks very different situations at the country level and these are explored in the country-by-country analysis.

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<sup>4</sup> QA1 - On the whole, are you satisfied, fairly satisfied, not very satisfied or not at all satisfied with the life you lead? QA3.1 - 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, QA4.1 - Compared with five years ago, would you say things have improved, gotten worse or stayed about the same when it comes to...? Your life in general.

Figure 1: QA1, QA4.1 and QA3.1 - Score cards (index table, showing the evolutions)

COUNTRY RANKING: Your life in general

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
			Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
			EB 73.5	EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2	EB 73.5
 EU27	3,1	-0,1	-5	40%	-2	+9	56%	-1
 DK	7,7	-0,3	+32	34%	-5	+30	62%	+3
 SE	6,6	+0,1	+49	24%	+8	+42	50%	+5
 NL	6,1	-0,3	+24	42%	-2	+16	62%	+2
 IE	5,8	+0,5	+12	35%	-5	+17	60%	+13
 LU	5,7	=	+34	38%	+19	+17	53%	+4
 FI	5,6	-0,3	+29	43%	+2	+20	69%	+2
 UK	5,1	-0,2	+16	33%	+3	+17	47%	-6
 BE	4,7	-0,2	-3	43%	-11	+11	62%	+2
 CY	4,7	+0,1	+1	37%	-13	+3	56%	-2
 AT	4	+0,4	-4	57%	+8	+12	66%	+15
 SI	4	+0,1	-23	35%	-2	+2	60%	+4
 DE	3,9	=	-3	44%	=	+3	64%	+6
 MT	3,9	=	+4	27%	+9	+10	52%	+1
 FR	3,4	=	-5	36%	-2	+13	54%	-7
 ES	3,3	+0,5	-14	38%	-11	+12	58%	-7
 PL	3	+0,1	+2	44%	-1	+15	58%	+4
 CZ	2,7	-0,4	-12	43%	-5	-8	61%	-3
 SK	2,7	+0,9	0	44%	-3	+11	55%	+16
 EE	1,9	=	0	28%	-8	+19	43%	+21
 IT	1,4	-0,2	-12	52%	+9	+11	57%	+5
 LV	0,8	+0,3	-29	23%	-12	+12	57%	+19
 LT	0,5	-0,6	-47	22%	-24	-10	50%	-5
 HU	0	+0,8	-41	35%	+13	+13	52%	+41
 PT	-0,5	-1	-36	35%	-7	-11	51%	-12
 EL	-0,7	-0,1	-44	28%	-17	-35	40%	-29
 BG	-2,2	-0,3	-42	39%	-9	0	61%	+9
 RO	-2,4	-2,2	-41	28%	-32	-24	41%	-27

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

The country-by-country analysis shows that some of the Nordic Member States tend to be clustered at the top of the ranking, joined – as they were last year – by the Netherlands, Belgium, Luxembourg, the United Kingdom and Ireland.

Denmark and Sweden both report a level of satisfaction with life in general which is more than double of the EU27 average. They report index scores of 7.7 and 6.6 respectively, compared to an overall level of 3.1. A significant proportion of the Member States report lower than average satisfaction levels – notably countries such as Greece, Romania and Bulgaria which were hit particularly hard by the financial crisis.

The score for the current situation in Denmark has dipped by -0.3 of an index point, as it has in Finland, although in Sweden opinion has improved slightly. Ireland shows a significant improvement in perceptions of life situation, with an increase of +0.5 – the third highest recorded, matched by Spain and only bettered by Slovakia and Hungary. Current perceptions of living situations declined most sharply in Romania, falling -2.2 points and dropping to the bottom of the table.





For the situation now as it compares to **five years ago**, Greece and Lithuania report the lowest indexes (-44 and -47 on the better-worse index, respectively) although there are a significant number of countries – mainly clustered around the bottom of the current situation table – where people have seen a marked difference in life satisfaction. Many of the countries which report a large decrease in life satisfaction are marking the next point in a gradual decline – of the bottom ten, Romania, Greece, Lithuania and Latvia report a decrease of more than ten points compared to last year's five-year comparison. Among the lowest-ranking countries, both Hungary and Italy record a degree of positivity, with a better-worse index improved since the last report by +13 and +9 points respectively.

Indeed, a slight air of optimism prevails almost across the board when respondents were asked to consider whether or not things are set to improve over the **next twelve months**. Even if 21 of the 27 Member States expressed optimism about the short-term future, it is important to note here that the majority of respondents in most countries maintained that the situation would remain the same.

Overall, in terms of evolution, it should be noted that some countries – in particular Sweden, Austria and specially Hungary – recorded an increase on the last set of data for all three dimensions (current general situation, situation five years ago, situation one year from now).

Figure 2: QA1, QA4.1 and QA3.1 - SD tables (index table, showing the evolutions)

SOCIO-DEMOGRAPHIC TABLE: Your life in general

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
	EB 73.5	EB 73.5 - EB 71.2	Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
			EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
EU27	3,1	-0,1	-5	40%	-2	+9	56%	-1
<b>Gender</b>								
 Male	3,1	-0,1	-2	39%	-2	+10	55%	-2
Female	3	-0,1	-7	40%	-2	+8	57%	+1
<b>Age</b>								
 15-24	4,4	=	+25	35%	-5	+37	41%	=
25-39	3,1	-0,2	+11	30%	-3	+22	48%	=
40-54	2,7	=	-11	38%	-1	+4	59%	+1
55 +	2,7	-0,2	-25	50%	=	-10	65%	-2
<b>Education (End of)</b>								
 15-	2	-0,2	-29	46%	-2	-6	62%	-2
16-19	2,6	-0,3	-10	39%	-1	+5	56%	-1
20+	4,1	=	+13	36%	-5	+15	55%	-1
Still studying	4,9	=	+30	40%	-3	+37	43%	-2
<b>Respondent occupation scale</b>								
 Self-employed	3,4	+0,1	-5	38%	-4	+7	54%	-6
Managers	4,6	-0,2	+26	36%	-6	+18	58%	+1
Other white collars	3,5	-0,2	+12	37%	=	+15	56%	+1
Manual workers	2,9	-0,1	0	35%	-3	+14	55%	+4
House persons	2,1	-0,4	-20	44%	-7	0	61%	-4
Unemployed	0,8	+0,3	-38	25%	+3	+9	38%	-2
Retired	2,6	-0,3	-27	50%	-1	-11	66%	-2
Students	4,9	=	+30	40%	-3	+37	43%	-2
<b>Difficulties paying bills</b>								
Most of the time	-1,5	-1,2	-54	21%	-11	-7	42%	-6
From time to time	1,6	-0,2	-24	35%	-5	+3	51%	-2
Almost never	4,4	=	+12	45%	+1	+13	61%	=

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

Socio-demographic factors clearly play a part here. It is noticeable that the youngest respondents are more positive about their current life situation than those aged 25 and over. The youngest age band had an average index of 4.4, compared to 2.7 among those aged 40 and over. There is little significant change to report since the last survey wave; both the 25-39 age group and those aged 55 and over reported a slight drop in satisfaction of -0.2.

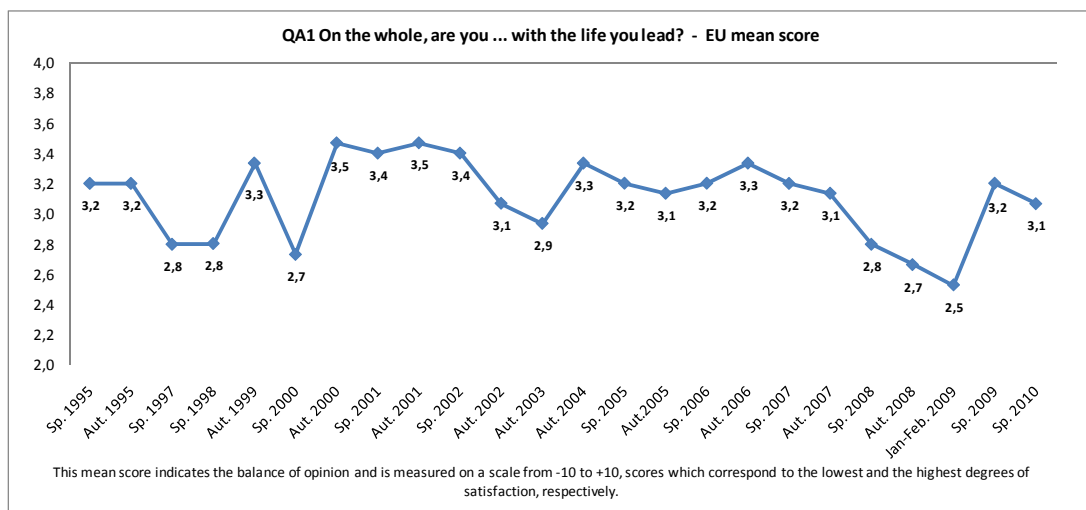
Those who either continued in education beyond the age of 19 or who are still studying are more confident about the situation than those who finished their education earlier: 4.1 for those who left school at the age of 20 or after, and 4.9 for those still studying compared to 2 for those who finished at 15 or earlier, and 2.6 for those who finished their studies between the ages of 16 and 19. With regard to employment status (excluding current students), managers are more positive than the self-employed, manual workers, house persons, the unemployed and the retired. These figures have all dropped slightly across the board compared to last year – with the exception of the unemployed, who record an increase of +0.3 index points and self-employed of +0.1, possibly in response to encouraging news about the economy and significant political changes in a number of Member States.

The financial situation bears most heavily on those who stated that they had difficulties in meeting the cost of living – respondents who reported having difficulties in paying their bills reported an average index score of -1.5, while those respondents who were in little or no financial difficulty responded with a much more satisfied average of 4.4.

Compared to last year, the most significant change in this socioeconomic category is a drop of 1.2 index points in the quality of the general situation of people who reported difficulties with paying bills – this is unsurprising, given the widely-reported rises in cost of living over Europe and the ongoing fight to end the worldwide recession.

Despite the crises, there has been a relatively consistent trend since 1995, with only small variations observed at general EU-wide levels of public satisfaction with life in general.

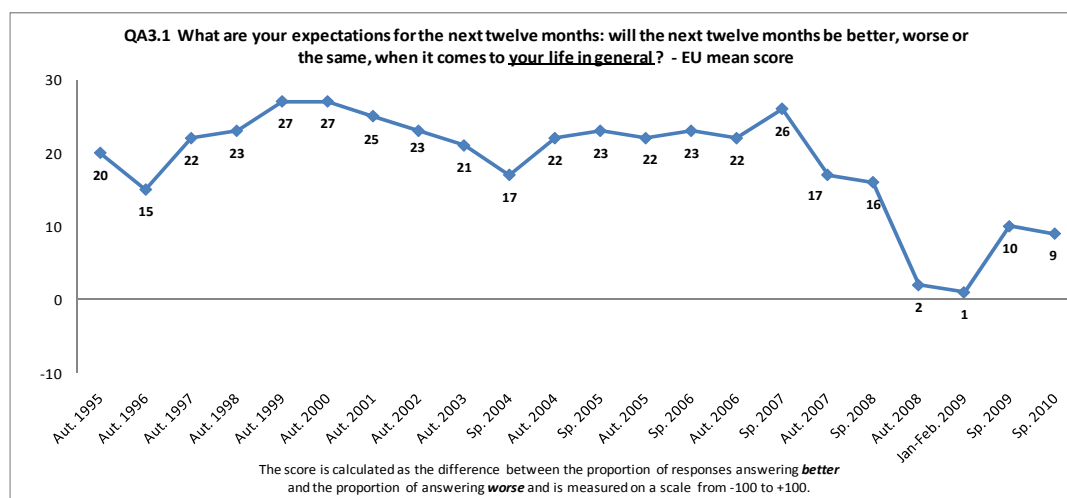
**Figure 3: QA1 - Trend line**



This trend line indicates that the EU mean score is almost as high as it was in 1995 (it currently stands at 3.1, a slight drop from the spring 2009 score of 3.2, compared to the highest score of 3.5 recorded in autumn 2000 and autumn 2001). This follows a relatively sharp decrease in the mean score between the end of 2007 and the beginning of 2009, when the recession was most severely felt (and was hogging the majority of headlines).

The slight signs of optimism observed in Spring 2009 (compared to January February 2009) need to be tempered by the long-term trend line: when it comes to their life in general, Europeans' short-term expectations were better from Autumn 1995 to Spring 2008 included. However the mood still remains optimistic overall. There are marked national differences, and a significant number of Member States still report a low level of satisfaction in general.

Figure 4: QA3.1 - Trend line



This optimism is similarly reflected in the trend line showing expectations of how the situation will change over the next twelve months – although it should be noted that again, the majority of respondents from most Member States stated that the situation would remain the same. The optimism recorded on the better-worse index also remains cautious. Although better than in the preceding survey waves, the score still remains around half of what it was for most waves between 1995 and 2007.

### **1.2 Residential area (QA2\_1; QA3\_2; QA4\_2<sup>5</sup>)**

We now turn our attention to respondents' feelings about the areas in which they live, and whether or not they feel that the quality of their immediate surroundings has improved or got worse (or is likely to improve or get worse).





























Respondents' satisfaction with the area they live in is generally higher than their satisfaction with life in general. At an EU level, satisfaction with the current situation is relatively high, with an average score of 4.2. This score has not changed since the last survey wave, although when respondents are asked how the situation compares to five years ago and how it will be in a year's time, responses to both questions record a -1 point decrease on the better/worse index (retaining a slight positive score of +4 in both cases, with a very high proportion of "the same" responses).

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<sup>5</sup> QA2.1 - How would you judge the current situation of...? The area you live in, QA3.2 - What are your expectations for the next twelve months; will the next twelve months be better, worse or the same, when it comes to...? The area you live in, QA4.2 - Compared with five years ago, would you say things have improved, gotten worse or stayed about the same when it comes to...? The area you live in.

Figure 5: QA2.1, QA3.2 and QA4.2 - Score cards (index table, showing the evolutions)

COUNTRY RANKING: The area you live in

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO				EXPECTATIONS FOR THE COMING 12 MONTHS		
			Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index	
			EB 73.5	EB 73.5 - EB 71.2	EB 73.5	EB 73.5 - EB 71.2	EB 73.5	EB 73.5 - EB 71.2	
 EU27	4,2	=	+4	60%	-1	+4	74%	-1	
 SE	7	-0,6	+14	60%	+1	+13	78%	=	
 LU	6,5	+0,5	+29	55%	+14	+7	77%	+2	
 NL	6,2	+0,1	+11	62%	-1	+4	79%	+1	
 IE	6,2	-0,1	+15	54%	-4	+6	78%	+2	
 FI	6,2	+0,1	+21	64%	+6	+8	86%	+3	
 BE	5,7	-0,4	+6	68%	-4	+6	79%	=	
 UK	5,4	+0,2	+5	60%	+1	+3	73%	-5	
 AT	5	+0,2	+4	69%	+14	+5	76%	+11	
 DE	5	-0,1	+1	68%	-2	0	83%	+3	
 FR	5	-0,3	+13	60%	-2	+16	76%	+2	
 DK	4,9	-0,8	+8	60%	-6	+7	78%	-1	
 CY	4,7	-0,3	+7	52%	-4	+7	75%	+3	
 ES	4,2	+0,7	+4	57%	-6	+5	74%	-9	
 CZ	4,1	+0,2	+12	58%	+1	+6	78%	+5	
 SK	4	+0,8	+8	60%	=	+8	71%	+9	
 PL	3,7	=	+23	54%	+5	+15	71%	+6	
 SI	3,6	=	-14	53%	-1	-3	71%	+2	
 MT	3,6	-0,7	+10	51%	+12	+5	69%	-6	
 EE	3,4	-0,4	+18	46%	-5	+16	67%	+10	
 LT	3,3	-0,5	-10	61%	-16	+7	75%	+5	
 HU	2,9	+1	-2	51%	+17	+14	65%	+27	
 LV	2,7	-0,1	-2	52%	-7	+8	77%	+7	
 PT	2,5	-0,5	-13	56%	-8	-8	69%	-10	
 RO	2,3	-0,3	-7	52%	-19	-6	66%	-16	
 IT	2,1	-0,3	-11	61%	-1	+2	68%	-4	
 EL	1,4	-0,3	-27	44%	-4	-22	57%	-11	
 BG	1,2	+0,2	-17	58%	-13	+2	74%	=	

The current situation index is measured on a scale from -10 to +10.  
The better-worse indexes are measured on a scale from -100 to +100.



At the country-by-country level, Sweden tops the table with an average score of 7 on the **current situation** index. None of the Member States record a score of less than 1. Among the countries which reported a rise in both satisfaction now compared to five years ago, and expectations for the coming twelve months, are Luxembourg, the Netherlands, Finland, Austria and Slovakia. Luxembourg, the Czech Republic and Hungary record improvements for all dimensions.

As in the previous report, certain Nordic Member States, Benelux, the UK and Ireland dominate the higher part of the table, with Southern and Eastern Member States reporting generally lower levels of satisfaction with their surroundings. Sweden records the highest levels of satisfaction in the EU, despite the fact that the level has dropped by -0.6 to 7 since the last wave – the third largest such decrease after Malta (score falls by -0.7 to 3.6) and Denmark (score falls by -0.8 to 4.9). Luxembourg recorded a significant increase in score, up by 0.5 to 6.5, a rise which takes it to second place in the table. Significant increases in satisfaction with surroundings were also recorded in Spain, where the score rose by +0.7 to 4.2, Slovakia, up by 0.8 to 4, and Hungary, where the score increased by +1 to 2.9. Elsewhere, fluctuations in the overall level of satisfaction remained slight and in some places the score remained the same.





For the comparison with the situation as it was **five years ago**, high index scores are recorded in Luxembourg (+29), Poland (+23) and Finland (+21), although the numbers of people who said that nothing had changed in their immediate area was above 50% in each of these countries. Hard-hit Greece recorded a relatively low “same” percentage (44%) on the five-year comparison, with a better/worse index of -27 reflecting the recent difficulties. Negative indexes are also recorded in Bulgaria (-17), Slovenia (-14) and Portugal (-13). Fundamentally, the number of respondents who believe that the quality of the area where they live is the same as it was five years ago, and – to a greater extent – who believe that it will remain the same over the next twelve months is very high, with averages of 60% and 74% across the EU respectively.

There is a degree of optimism regarding the **next twelve months**, with an overall score of +4 on the better/worse index. Several Member States, such as France (+16), Estonia (+16), Poland (+15), Hungary (+14) and Sweden (+13) record positive scores. However, there are gloomier outlooks in other Member States, including Greece (-22) and Portugal (-8).

Since last year, the score has increased dramatically in some instances – Hungary, for example, recorded a score up 27 points on last year, Austria recorded an increase of +11, and Estonia an increase of +10. Romania (-16), Greece (-11) and Portugal (-10) all recorded significant decreases as compared to the last survey wave. The percentage of respondents who believe that the situation will remain the same over the next twelve months is also extremely high across the board, although it is interesting to note that Greece gives the lowest number of “same” answers here (57%) and also records a significantly low score (-22) on the better/worse index.

Figure 6: QA2.1, QA3.2 and QA4.2 - SD tables (index table, showing the evolutions)

SOCIO-DEMOGRAPHIC TABLE: The area you live in

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
	EB 73.5	EB 73.5 - EB 71.2	Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
			EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
EU27	4,2	=	+4	60%	-1	+4	74%	-1
<b>Gender</b>								
 Male	4,1	-0,1	+5	59%	-2	+5	74%	-1
Female	4,3	+0,1	+3	61%	=	+5	75%	=
<b>Age</b>								
 15-24	4,2	=	+13	52%	-1	+16	68%	+3
25-39	3,9	-0,1	+11	54%	-1	+9	69%	-2
40-54	4,1	=	0	59%	-3	+3	76%	=
55 +	4,5	=	-4	69%	=	-1	79%	-1
<b>Education (End of)</b>								
 15-	3,8	+0,1	-7	66%	-1	-2	78%	-2
16-19	4,1	-0,1	+2	60%	-2	+4	74%	-1
20+	4,7	-0,1	+11	57%	-2	+7	74%	=
Still studying	4,4	=	+15	54%	=	+18	68%	+3
<b>Respondent occupation scale</b>								
 Self-employed	4,3	+0,1	+4	55%	+1	+3	73%	-5
Managers	5	-0,1	+14	58%	-2	+8	75%	-1
Other white collars	4,2	-0,3	+7	59%	-5	+3	74%	-5
Manual workers	4	-0,2	+5	57%	-3	+9	73%	+3
House persons	3,6	-0,1	-2	63%	+3	0	74%	-1
Unemployed	3	+0,4	-4	51%	=	+5	67%	-1
Retired	4,6	=	-4	69%	-2	-1	80%	-1
Students	4,4	=	+15	54%	=	+18	68%	+3
<b>Difficulties paying bills</b>								
Most of the time	2	-0,1	-15	51%	-2	-2	68%	-2
From time to time	3,4	+0,1	-3	57%	-2	+3	71%	-1
Almost never	4,9	-0,1	+11	63%	+1	+6	77%	-2

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

It is important to consider socio-demographic figures across the board as, particularly in times of economic crisis, factors such as education, age and employment play a significant role in determining the type of area in which a person is able to – and chooses – to live.

It seems evident that a fairly steady, moderate level of general satisfaction with the areas in which EU citizens live crosses socio-demographic as well as geographical boundaries. The most noticeable factor in the table above is the relative lack of variation in the results for almost all the individual groups within society – young and old, male and female, at all levels of education. When evaluating the current situation, men and women had scores within an average 0.1 of a point on either side of the EU average (4.1 and 4.3 respectively, compared to 4.2 overall).

The average index scores for age groups are very close to each other, with only the 25-39 age band expressing slightly lower levels of satisfaction with their surroundings. Education is a slightly more significant factor: those who studied into their twenties express a higher rate of satisfaction with the area in which they live than, for example, those who left school before the age of 15 (4.7 compared to 3.8).

The unemployed and house persons report a markedly lower level of satisfaction than other occupational groups. Managers report the highest level of satisfaction with the area they live in (5 index points, compared to 3 for the unemployed and 3.6 for house persons), followed closely by the retired who record an average score of 4.6. There is also a noticeable difference in the scores of people who suffer little or no financial difficulty, and those who struggle to pay their bills (4.9 compared to 2).

The changes since last year are negligible, with the exception of two points: the unemployed report an increase in satisfaction of +0.4 index points, and those who fall into the "other white collar" category report a decrease of -0.3 points. The overall EU average remains the same.

When asked to compare their satisfaction with their surroundings with the satisfaction five years ago, and anticipate how things might change in the next twelve months, a large number of respondents answered that things have stayed and are expected to stay the same, almost across the board. In the five-year comparison, higher scores on the index are given by students (+15) and those with a high level of education (+11), the youngest two age bands (+13 for the 15-24 group, and +11 for those aged 25-39) and managers (+14). Optimistic scores are given regarding expectations of improvement in their surroundings over the next year by students and the youngest age band, who also give fewer "same" answers than the majority of the demographic groups.

### **1.3 Personal job situation (QA2\_12; QA3\_13; QA4\_13<sup>6</sup>)**

In sharp contrast to how respondents feel about the areas in which they live, the question relating to respondents' personal employment situation produced low scores across the whole of the EU. Negative scores are recorded for the current situation in a significant number of Member States.

The EU27 average scores for this question are mixed: 1.5 for the current situation, a better/worse score of -6 for the five-year comparison, and a score of +5 on the better/worse index relating to twelve-month expectations.





























The score for the current situation has increased by +0.1 since the last survey wave, despite the fact that 20 of the 27 Member States reported an increase, in most cases of more than 0.1 of a point. The average score for the five-year comparison has decreased by -1 point on the better/worse index since the last wave, as has the average response to the question on twelve-month expectations.

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<sup>6</sup>QA2.12 - How would you judge the current situation of....Your personal job situation, QA3.13 - What are your expectations for the next twelve months; will the next twelve months be better, worse or the same, when it comes to...? Your personal job situation, QA4.13 - Compared with five years ago, would you say things have improved, gotten worse or stayed about the same when it comes to...? Your personal job situation.

Figure 7: QA2.12, QA3.13 and QA4.13 - Score cards (index table, showing the evolutions)

COUNTRY RANKING: Your personal job situation

		EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
				Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
				EB 73.5	EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2	EB 73.5
	EU27	1,5	+0,1	-6	48%	-1	+5	60%	-1
	DK	5,4	+0,3	+18	54%	-3	+19	72%	+1
	LU	5,2	+0,7	+22	50%	+11	+12	63%	+1
	SE	5,1	+0,4	+31	37%	+10	+30	61%	+10
	FI	4,9	-0,1	+6	66%	+1	+7	81%	+2
	NL	4	-0,3	+11	39%	-2	+11	56%	+2
	AT	3,6	+0,5	+4	58%	+9	+7	68%	+12
	BE	3,2	-0,1	+6	57%	+2	+13	66%	+2
	UK	2,7	+0,2	+4	44%	+5	+13	56%	-1
	DE	2,6	+0,2	+4	50%	+1	+6	65%	+1
	FR	2,3	+0,3	+3	45%	=	+11	55%	-4
	EE	2,3	+0,4	-9	33%	-6	+22	42%	+22
	CY	2,2	+0,3	-8	50%	-7	-6	58%	-5
	MT	1,9	+0,1	+3	37%	+5	+5	53%	=
	CZ	1,8	-0,1	-10	45%	+2	-2	60%	+5
	SK	1,7	+0,9	-4	49%	+5	+8	59%	+18
	SI	1,3	+0,1	-16	51%	+8	-3	66%	+5
	PL	1,2	+0,2	0	59%	-3	+9	69%	+2
	IE	0,7	+0,7	-16	44%	-2	+1	61%	+8
	ES	0,5	+0,4	-22	51%	-9	+3	66%	-9
	IT	0,2	+0,5	-15	57%	+2	+1	59%	-2
	LV	0	+0,2	-26	34%	-6	+9	55%	+12
	PT	-0,5	-0,7	-27	50%	-12	-12	60%	-12
	LT	-1,2	+0,2	-54	21%	-8	-21	41%	+3
	BG	-1,3	+0,2	-27	53%	-7	+1	63%	+8
	EL	-2	-1	-30	38%	-11	-29	47%	-19
	HU	-2,9	+0,1	-42	39%	-1	+3	54%	+30
	RO	-2,9	-2,4	-32	28%	-20	-26	35%	-24

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

The country with the highest score for the index on the evaluation of the **current situation** is Denmark (5.4, substantially higher than the EU average of 1.5), followed closely by Luxembourg and Sweden (5.2 and 5.1).

Again, geographically, the highest-scoring countries tend to be the Nordic and Benelux Member States, although Austria also recorded a high level of satisfaction with the employment situation in this wave. There is a steady decline down the ranking to Latvia's index of 0, then a series of sharp negative indexes – Portugal records a score of -0.5, Lithuania and Bulgaria scores of -1.2 and -1.3 respectively, Greece a score of -2, and lastly Hungary and Romania, in both of which respondents had an average score of -2.9.

Despite these negative indexes in 6 Member States, the situation seems to have improved in most of the countries over the past year, with a few exceptions. The most significant increases are in Slovakia (+0.9), Ireland and Luxembourg (+0.7 each), Italy and Austria (+0.5), and Sweden, Spain and Estonia (+0.4 each). On the other hand, Romania, Greece and Portugal reported significantly lower levels of satisfaction with their employment situation than last year, with decreases of -2.4, -1 and -0.7 respectively.






For the **five-year comparison**, there is a wide range of responses from Member States on the better/worse index, and much more disparity in the proportions of "same" answers. The highest scores are reported in Sweden (+31, +10 higher than last year) and Luxembourg (+22, +11 higher than last year) and very low scores are recorded in Lithuania (-54, with a "same" percentage of only 21%), Hungary (-42) and Romania (-32, with another low "same" score of 28%). Respondents in Sweden, Estonia and Denmark are the most optimistic about the next twelve months, with Greece recording the lowest level of optimism and a comparatively low percentage of respondents who believe that the situation will stay the same (-29, 47%) followed closely by Romania (-26, 35%).

There is a degree of optimism with regard to how the situation will change over the **next twelve months**. The overall EU score of +5 on the better/worse index is influenced by high scores from Sweden (+30), Estonia (+22) and Denmark (+19). However, there is also a real swing in some Member States towards the negative. Respondents in Greece (-29), Romania (-26) and Lithuania (-21) all said that the situation would worsen, with scores in Greece and Romania falling sharply since the last survey wave (by -19 and -24 respectively). Scores in Hungary and Estonia for this question rose sharply on last year, by +30 (to +3) and +22 (to +22) respectively.

Luxembourg and Sweden (which tops the scale for all three indexes) reported increases for each dimension – the situation now, the situation compared to five years ago and expectations for the coming twelve months, as did Austria, Germany, Slovakia and Slovenia.

Figure 8: QA2.12, QA3.13 and QA4.13 - SD tables (index table, showing the evolutions)

SOCIO-DEMOGRAPHIC TABLE: Your personal job situation

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
			Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
	EB 73.5	EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
EU27	1,5	+0,1	-6	48%	-1	+5	60%	-1
<b>Gender</b>								
 Male	1,6	=	-4	48%	=	+7	59%	=
 Female	1,3	+0,1	-8	49%	-2	+3	61%	-2
<b>Age</b>								
 15-24	1,6	+0,3	+11	42%	-1	+23	44%	-4
25-39	1,4	=	+3	39%	-1	+13	55%	-1
40-54	1,2	=	-14	49%	=	0	65%	-1
55 +	1,9	+0,2	-14	57%	-2	-6	67%	=
<b>Education (End of)</b>								
 15-	0,3	+0,4	-19	54%	-2	-4	65%	-2
16-19	1	=	-12	46%	-1	+1	59%	-3
20+	2,9	=	+9	46%	-2	+10	62%	-1
Still studying	2,3	+0,2	+12	48%	=	+24	46%	-1
<b>Respondent occupation scale</b>								
 Self-employed	2,1	+0,2	-5	46%	-2	+1	57%	-12
Managers	4,1	-0,4	+22	47%	-5	+11	67%	=
Other white collars	2,7	+0,1	+6	48%	-3	+5	65%	-4
Manual workers	2,2	+0,1	+1	47%	-1	+5	63%	=
House persons	-0,9	+0,1	-20	56%	-4	-4	60%	-4
Unemployed	-5,5	+0,5	-60	21%	+5	+11	35%	=
Retired	1,8	+0,3	-14	57%	-2	-6	67%	-1
Students	2,3	+0,2	+12	48%	=	+24	46%	-1
<b>Difficulties paying bills</b>								
Most of the time	-3,5	-0,7	-45	34%	-8	-6	46%	-3
From time to time	-0,2	=	-20	45%	-2	-1	55%	-4
Almost never	3,2	+0,1	+7	53%	=	+8	65%	-2

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

Analysing the data by socio-demographic groups, we can see that men and women are less evenly balanced in their opinion on their current employment situation, with male respondents displaying a slightly higher average level of satisfaction (1.6) than women (1.3). Overall, this sets the tone for the way that the demographic groups responded to this question – though once again, there are some exceptions.

Age does not seem to be a significant factor in changes in employment satisfaction across the EU – the lowest score came from the 40-54 age group, who averaged 1.2, the highest was found in the next age band up (55+) who recorded an average of 1.9.

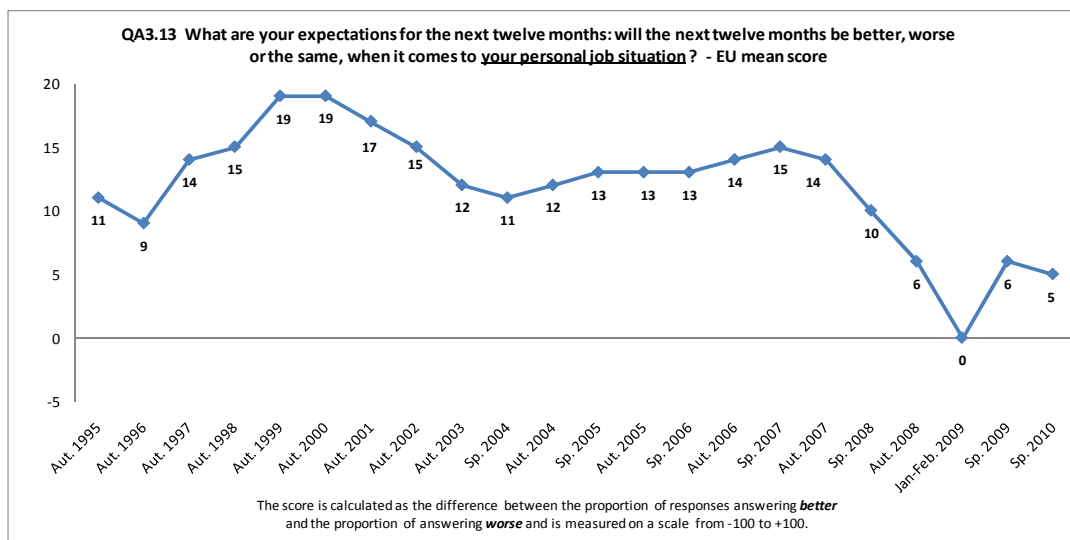
There is a relatively steep rise in satisfaction levels among people who stayed longer in education – with the results ranging from 0.3 for those who left before the age of 16 to 2.9 for those who studied into their twenties. Those who finished their education at the age of 15 or before are more hopeful about the situation than last year – their average response shows a rise of +0.4 of an index point this year.

As we might expect, an analysis of respondents' occupations reveals the wide variety of responses which make up the relatively low EU average score of 1.5. Managers record an index of 4.1, whereas the result for the unemployed is much lower (-5.5). Similarly, the index for those who admit to having financial difficulties stands at -3.5, while those who have no problems have a satisfaction level of 3.2. However, although rising costs of living across the EU might have contributed to the negative response from those who have almost always difficulties paying their bills (this year's score is -0.7 lower than last year), hopes seem to be on the rise – the unemployed are +0.5 of an index point more satisfied this year than last.

In the five-year comparison, the unemployed and those with financial difficulties reported a significant decrease in levels of satisfaction with their employment situation (with indexes of -60 and -45 respectively). A small proportion of each of these groups also said that things had remained the same (21% and 34%).

The twelve-month forecast revealed a significant degree of optimism among the youngest age band and those who are still studying. Younger respondents are confident that things will improve over the next twelve months (+23 for the 15-24 age group, +13 for the 25-39 group) although these scores have fallen since the last survey wave by -4 and -1 respectively. Current students and those educated to age 20+ are also confident, with average scores of +24 and +10 respectively, although these scores have fallen by – 1 since the last report.

**Figure 9: QA3.13 - Trend line**





As with the “general life situation” trend line, we see a relatively even line broken by a sharp dip at the start of the financial crisis (September 2008), and a tentatively optimistic recovery between the beginning of 2009 (January-February) and spring 2009. However, levels of optimism are lower than at the start of the line (autumn 1995).

#### **1.4 Household financial situation (QA2\_13; QA3\_14; QA4\_14<sup>7</sup>)**

The average index of the evaluation of the current household financial situation is 1.1. This represents a drop of -0.1 since the last wave in spring 2009. The average score for the five-year comparison has also dropped by -3, giving a negative overall result of -18: the majority of respondents believe that the situation has worsened. When asked to consider the situation over the forthcoming twelve months, the average response is also negative (-3) and down on last year's result (also by -3 points).

Average responses to the question relating to the **current** financial state of the household differ markedly from Member State to Member State, with a top score of 4.8 recorded in Denmark, and the lowest score of -2.8 reported in Romania.

The top six ranking Member States are the Nordic and Benelux countries, providing the most distinct example of a pattern noted in this set of questions. There is a steady drop in score as we move down through the middle-ranking countries in the table, with a series of steeper drops in the average scores of the bottom-ranking Member States of Greece, Bulgaria, Hungary and Romania.





























Both Greece and Romania also record a sharp decline in the household financial situation since the last wave, by -1.1 and -1.9 respectively. Hungary stands near the bottom of the list despite a relatively strong increase in the score since last year, up +0.7 of a point. Significant improvements in the assessment of the household financial situation were also recorded in Slovakia (+1.1) and Austria (+0.8), both countries demonstrating trends observed in other questions in this round. Hungary and Cyprus also reported a relatively high increase of +0.7 and +0.6 respectively this year.

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<sup>7</sup> QA2.13 - How would you judge the current situation of... The financial situation of your household, QA3.14 - 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, QA4.14 - Compared with five years ago, would you say things have improved, gotten worse or stayed about the same when it comes to...? The financial situation of your household.

Figure 10: QA2.13, QA3.14 and QA4.14 - Score cards (index table, showing evolutions)

COUNTRY RANKING: The financial situation of your household

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
	EB 73.5	EB 73.5 - EB 71.2	Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
			EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
 EU27	1,1	-0,1	-18	44%	-3	-3	60%	-3
 DK	4,8	+0,1	+15	46%	-3	+15	71%	-1
 SE	4,8	-0,2	+26	29%	+8	+24	60%	+9
 LU	4,5	+0,4	+24	50%	+18	+9	68%	+2
 NL	4	-0,6	+9	46%	-8	+3	64%	-1
 FI	3,8	+0,1	+11	57%	+2	+6	78%	=
 BE	2,7	-0,1	0	57%	=	+10	69%	+1
 AT	2,6	+0,8	-10	53%	+11	+4	67%	+15
 UK	2,3	+0,2	-3	42%	+5	+3	58%	-5
 DE	1,9	-0,1	-12	50%	+3	-5	66%	+2
 FR	1,6	+0,1	-9	43%	+1	+7	61%	-5
 IE	1,1	+0,4	-28	40%	-5	-10	61%	+7
 CY	1,1	+0,6	-32	41%	-12	-22	62%	-3
 SK	1,1	+1,1	-11	46%	+7	+4	60%	+20
 EE	1,1	+0,2	-15	36%	-13	+15	49%	+19
 MT	0,9	+0,3	-15	39%	+12	-10	59%	+3
 SI	0,8	-0,3	-32	43%	+2	-8	64%	+6
 CZ	0,8	+0,2	-29	42%	-4	-17	61%	-1
 ES	0,6	-0,1	-33	45%	-16	0	65%	-10
 IT	0,4	-0,1	-22	56%	+7	0	60%	+4
 PL	0,1	-0,1	-9	41%	-1	+3	61%	+1
 LV	-0,7	-0,1	-37	28%	-7	+6	56%	+17
 LT	-0,8	-0,1	-52	25%	-16	-20	53%	-4
 PT	-1	-0,6	-45	38%	-8	-21	55%	-11
 EL	-1,9	-1,1	-62	22%	-22	-56	33%	-33
 BG	-2,3	+0,2	-48	34%	-6	-10	50%	+11
 HU	-2,5	+0,7	-60	25%	+9	+1	50%	+49
 RO	-2,8	-1,9	-49	27%	-32	-38	36%	-33

*The current situation index is measured on a scale from -10 to +10.  
The better-worse indexes are measured on a scale from -100 to +100.*

The better/worse index comparing the current situation with the situation **five years ago** demonstrates a trend towards the worse, with several countries recording a low enough percentage of “same” answers for this to be significant.

Although five Member States near the top of the table – Denmark, Sweden, the Netherlands, Luxembourg and Finland – reported scores between +26 and +9, there is a unanimous move towards the view that things are worse now than they were before across the remaining Member States, except in Belgium where the index stands at 0.

The lowest scores are recorded in Portugal (-45), Bulgaria (-48), Romania (-49), Lithuania (-52), Hungary (-60) and Greece (-62), indicating that respondents in these countries think that the situation is much worse now than it was five years ago. Since the last survey, the most noticeable upward changes have occurred in Luxembourg (+18), Malta (+12) and Austria (+11), while Romania (-32) and Greece (-22) have recorded the biggest declines.





Optimism for the **next twelve months** also varies greatly from one Member State to other. Some countries, such as Sweden (+24), Estonia and Denmark (both +15), and Belgium (+10), report a degree of optimism. In contrast, others – Greece (-56), Romania (-38) and Cyprus (-22) – are pessimistic.

The evolution of the score from the last survey is also very varied. The Hungarian score of +1 represents a +49 increase on last year, while in both Greece and Romania the score fall by -33.

Overall, increases across all three dimensions were recorded in Luxembourg, Austria, Malta, Slovakia and Hungary, and thus in countries that are at the top, in the middle and at the bottom of the scale.

Figure 11: QA2.13, QA3.14 and QA4.14 - SD tables (index table, showing evolutions)

SOCIO-DEMOGRAPHIC TABLE: The financial situation of your household

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
			Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
	EB 73.5	EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
EU27	1,1	-0,1	-18	44%	-3	-3	60%	-3
<b>Gender</b>								
 Male	1,3	-0,2	-13	45%	-2	-1	60%	-3
Female	0,9	=	-21	43%	=	-5	60%	-3
<b>Age</b>								
 15-24	1,6	-0,2	+1	41%	-2	+16	54%	-2
25-39	1	-0,2	-3	35%	-4	+9	52%	-1
40-54	0,8	-0,1	-22	43%	-1	-5	60%	-1
55 +	1,1	-0,1	-32	53%	=	-17	68%	-1
<b>Education (End of)</b>								
 15-	0	=	-37	48%	-2	-15	64%	-3
16-19	0,6	-0,3	-23	42%	-1	-5	58%	-2
20+	2,5	-0,1	0	43%	-6	+3	61%	-4
Still studying	2,1	-0,1	+1	47%	-1	+17	58%	=
<b>Respondent occupation scale</b>								
 Self-employed	1,7	=	-10	43%	+1	-3	57%	-11
Managers	3,3	-0,3	+17	43%	-8	+7	64%	-1
Other white collars	2	-0,2	-3	42%	-6	+3	59%	-3
Manual workers	1	-0,2	-12	42%	-1	+2	59%	+2
House persons	-0,2	-0,3	-32	44%	-2	-10	60%	-4
Unemployed	-2,9	+0,1	-57	23%	=	-1	37%	-1
Retired	1	-0,1	-34	53%	=	-18	69%	-3
Students	2,1	-0,1	+1	47%	-1	+17	58%	=
<b>Difficulties paying bills</b>								
Most of the time	-4,6	-0,6	-68	19%	-8	-20	36%	-6
From time to time	-0,7	-0,1	-38	36%	-4	-8	51%	-2
Almost never	2,9	=	0	52%	=	+3	68%	-1

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

Broken down by socio-demographic group, the averages for this index are uniformly low and also show a significant decrease since the last wave. Men and women assessed the current situation differently, with a 0.4 difference between their scores (1.3 and 0.9 respectively). Optimism about the current situation is strongest in the youngest respondents, with an index of 1.6 in the 15-24 group, compared to 0.8 in the 40-54 band.

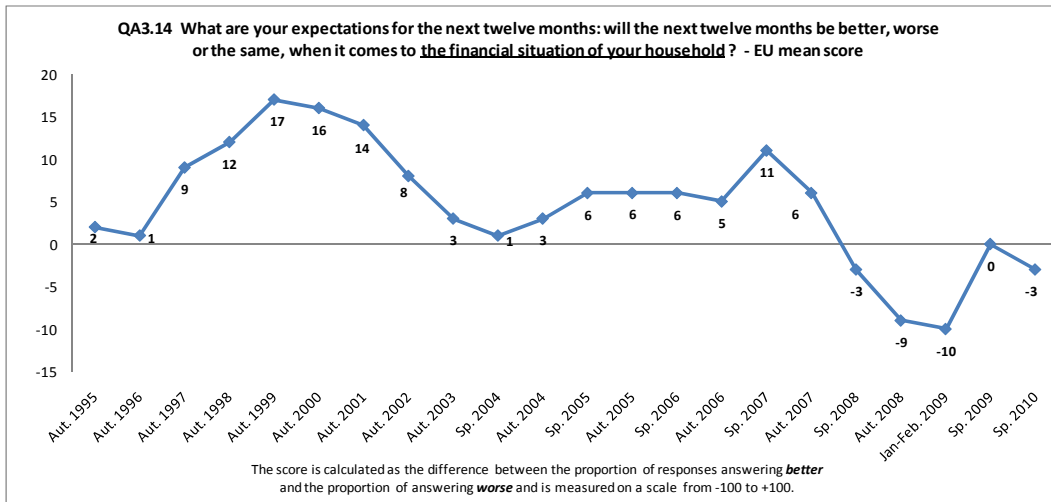
Those who studied until their twenties, or who were still studying when questioned, are on average more positive than those who finished their studies at an earlier age. The most striking difference is between those who finished their education before 16, who record a score of 0, and those who finished in their twenties, whose score stands at an average of 2.5.

An analysis by occupation reveals a marked difference between the top earners (managers) and the unemployed; these two groups recorded average scores of 3.3 and -2.9 respectively. Unsurprisingly, there is also a distinct difference between the scores of those who frequently have difficulties in paying the bills (-4.6) and those who do not (2.9).

Almost none of these scores showed an increase on last year, apart from the average recorded for the unemployed, who reported a +0.1 improvement in assessments of their household financial situation. The decreases were relatively low across the board, except in the case of those who reported financial difficulties, whose score has declined on average by -0.6 of an index point.

In the five-year comparison, the only people who reported an improvement are managers (+17), students (+1) and the 15-24 age band (+1). There is also an emerging trend towards optimism about the next twelve months among the youngest age groups, managers, white collar workers, and the highly educated, accompanied by pessimism among the older age groups and those who have difficulties paying their bills.

Figure 12: QA3.14 - Trend line



Like other trend lines in the report so far, levels of optimism relating to the household’s financial situation over the next twelve months dipped sharply in 2008 and have yet to reach the comparatively high levels recorded in the late 1990s. Expectations are at their highest ten years ago and, although the mood took a somewhat gloomy turn four years into the new century, a series of fluctuations maintained a low level of optimism. However, this took a severe knock around the onset of the crisis and, despite some improvement, has yet to return to positive figures.

## CONCLUSIONS

Indexes on the current situation are positive for all dimensions tackled: life in general, residential area, personal job situation and household financial situation. These positive scores indicate that the number of Europeans satisfied with their personal situation outnumbers those who are not satisfied, the situation of the residential area summarising well this pattern: all Member States recorded a positive index, with scores ranging from 7 in Sweden to 1.2 in Bulgaria.

The evolutions of scores for current situation from the last wave which was conducted one year ago are relatively limited, except for Romania, which recorded the biggest decrease in the European Union for three analysed dimensions out of four (-2.2 for life in general, -2.4 for personal job situation and -1.9 for the financial situation of the household).

However, the situation now is seen as worse than it was five years ago for three of the four domains analysed, the residential area being the exception. The worst 'better/worse' index is recorded for the financial situation of the household (-18 at European level), but there are five countries where people seeing an improvement outweigh those who see a deterioration: Denmark, Sweden, the Netherlands, Luxembourg and Finland. Except for these countries, and Belgium where the index stands at 0, there is a strong sense that things are worse now than they were five years earlier across the remaining Member States. The lowest scores are recorded in Lithuania (-52), Hungary (-60) and Greece (-62).

When it comes to the prospects for the next twelve months, the situation varies slightly from one domain to the other: positives scores are recorded for life in general and the personal job situation, negative ones for the residential area and the financial situation of the household. The highest better/worse index is recorded for life in general (+9 at European level): 21 of the 27 Member States express optimism about the short-term future, with the highest scores recorded in Sweden (+42) and Denmark (+30). Optimism has, however, weakened somewhat since the last wave.

There are clear geographical divides across the EU. Certain Northern European Member States, the three Benelux countries (Belgium, the Netherlands and Luxembourg), the UK and Ireland all report a degree of content and optimism. In these Member States, scores for all three dimensions – current, the comparison with five years ago, and expectations for the next year – are all simultaneously improving. Romania, Greece, Bulgaria, Portugal and Hungary report consistently low scores and also very low levels of optimism, although Hungary is showing distinct signs of improvement compared to the last wave.

## 2. GENERAL SITUATION IN THE COUNTRY

We now turn away from respondents' personal situation to analyse the general situation. For this analysis, six banks of questions were asked – relating to the current situation, the situation as compared to five years ago and the projected situation over the next twelve months. The questions cover the following topics: economic situation, employment situation, the cost of living, affordability of energy, affordability of housing and the way in which public administration is run.

### 2.1 *Economic situation (QA2\_11; QA3\_12; QA4\_12<sup>8</sup>)*

Firstly, respondents were asked to rate the general economic situation. Perceptions are extremely negative. Average figures are extremely low, particularly in comparison with the previous sets of questions. The EU27 score for the current situation is -3.6, the better/worse index for the five-year comparison is -69, and the expectations for the next twelve months are also that things will get worse (-19). The percentage of respondents who answered that things had remained the same is very low (16% in the EU). However, these results are all better than in the last survey wave.





























The score for the current situation is up +0.5 on the previous wave, and the better-worse index for both the five-year comparison and expectations over the next twelve months is also up on last year (+3 and +7 respectively). The judgement of the national economic situation is still gloomy, but the evaluation is better than it was a year ago: this may mean that respondents have perceived the first signs of economic recovery.

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<sup>8</sup> QA2.11 How would you judge the current situation of... The economic situation in (our country), QA3.12 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), QA4.12 Compared with five years ago, would you say things have improved, gotten worse or stayed about the same when it comes to...? The economic situation in (our country).

Figure 13: QA2.11, QA3.12 and QA4.12 - Score cards (index table, showing evolutions)

COUNTRY RANKING: The economic situation in (OUR COUNTRY)

EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS				
		Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index		
		EB 73.5	EB 73.5 - EB 71.2	EB 73.5	EB 73.5 - EB 71.2	EB 73.5	EB 73.5 - EB 71.2		
	EU27	-3,6	+0,5	-69	16%	+3	-19	35%	+7
	SE	3,1	+4,1	-25	21%	+31	+42	36%	+50
	LU	2,3	+0,9	-55	21%	=	-6	41%	+17
	AT	0,7	+2,1	-53	30%	+22	+4	43%	+38
	NL	0,3	+0,2	-79	10%	-4	-4	35%	+26
	FI	0,1	+0,3	-61	26%	-2	+5	46%	+32
	DK	-0,3	-2,7	-64	14%	-27	+9	40%	+19
	DE	-0,4	+2,8	-64	20%	+12	0	36%	+31
	PL	-1,4	+0,4	-7	34%	+22	+4	53%	+16
	MT	-2,1	+1,7	-40	17%	+22	-11	34%	+20
	CY	-2,3	-2,7	-86	7%	-33	-48	35%	-6
	EE	-2,5	+2,2	-62	10%	+2	+12	31%	+50
	BE	-2,6	+0,8	-73	18%	+8	-14	36%	+8
	SK	-3,3	+0,4	-54	23%	+7	-11	39%	+41
	SI	-3,6	-0,8	-68	15%	-5	-35	36%	+2
	FR	-4,2	+0,1	-84	9%	-4	-30	33%	-12
	IT	-4,3	+0,5	-62	26%	+8	-18	38%	+5
	CZ	-4,5	-0,1	-76	15%	+2	-31	35%	+23
	UK	-5,2	+0,3	-83	8%	-2	-19	29%	-1
	PT	-5,9	=	-85	12%	-8	-50	30%	-10
	LT	-6,1	-0,9	-91	4%	-14	-33	38%	=
	ES	-6,2	-0,9	-89	8%	-2	-38	31%	-18
	BG	-6,2	-0,5	-79	13%	-14	-17	38%	+22
	HU	-6,5	+0,8	-85	11%	+3	+2	37%	+62
	IE	-7,1	-0,6	-83	7%	-2	-36	29%	+10
	LV	-7,3	+1	-86	9%	-4	-8	43%	+31
	RO	-7,4	-2,3	-83	8%	-28	-60	21%	-34
	EL	-7,9	-1,7	-93	5%	-14	-76	13%	-20

*The current situation index is measured on a scale from -10 to +10.  
The better-worse indexes are measured on a scale from -100 to +100.*



Respondents in only five Member States feel upbeat about **the current economic situation** in their country: Sweden tops the Member States list, with an index of 3.1, a +4.1 point increase on the last wave.

Luxembourg (2.3) is the only other Member State to report a positive score above 1, and Austria (0.7), the Netherlands (0.3) and Finland (0.1) are the only other Member States not to record a negative average score. All other countries have negative indexes, and the scores fall steadily to -7.9 (Greece).

The scores drop at a steady rate – it is important to note that some countries which reported a relatively high or improved score for questions on personal situation recorded low scores here when asked about the general situation. This applies to Belgium (-2.6), Slovakia (-3.3), the UK (-5.2) and Ireland (-7.1).

Although the situation is seen as having worsened since the previous wave of June 2009 in some countries, such as Denmark, Cyprus (both -2.7), Romania (-2.3) and Greece (-1.7), many other Member States report that things are improving. Germany (+2.8), Estonia (+2.2) and Austria (+2.1) are examples of Member States which report significantly increased scores.

When asked to consider the situation now compared to **five years ago**, the mood is similarly negative. The answers indicated that the current situation is really perceived as worse than it was: the average score for the EU as a whole is -69 on the better/worse index and even in the top-scoring Member States respondents say that on average, the situation has deteriorated. The least pessimistic scores were noted in Poland (-7) and Sweden (-25). The lowest scores were recorded in Greece (-93) and Lithuania (-91).






Although there were no positive scores on the better/worse index for this question, some Member States, including Sweden (+31), Poland, Austria and Malta (all +22) and to a lesser extent, Germany (+12), reported significant improvements compared to last year. Several other Member States reported smaller improvements.

Levels of optimism for the **next year** are also low. Only Sweden (+42) recorded a significantly positive index, and many Member States, including Cyprus (-48), Portugal (-50), Romania (-60) and Greece (-76), reported a very low level of confidence in improvement.

The general trend for this dimension shows an improvement since the last wave, with a higher better/worse index in 19 Member States. The greatest improvements were recorded in Hungary (+62 points since last wave), Estonia and Sweden (both +50 since last wave).

Figure 14: QA2.11, QA3.12 and QA4.12 - SD tables (index table, showing evolutions)

SOCIO-DEMOGRAPHIC TABLE: The economic situation in (OUR COUNTRY)

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
			Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
	EB 73.5	EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
EU27	-3,6	+0,5	-69	16%	+3	-19	35%	+7
<b>Gender</b>								
 Male	-3,3	+0,5	-67	17%	+1	-16	35%	+7
 Female	-3,9	+0,4	-71	15%	+4	-20	35%	+8
<b>Age</b>								
 15-24	-3	+0,6	-58	18%	+4	-3	35%	+7
25-39	-3,7	+0,3	-69	15%	+1	-15	34%	+7
40-54	-3,8	+0,5	-73	15%	=	-21	36%	+7
55 +	-3,6	+0,6	-71	17%	+5	-24	36%	+9
<b>Education (End of)</b>								
 15-	-4,5	+0,6	-74	17%	+4	-29	37%	+4
16-19	-3,9	+0,5	-73	15%	+1	-22	34%	+5
20+	-2,7	+0,3	-68	15%	-1	-11	34%	+12
Still studying	-2,5	+0,6	-54	17%	+3	+3	36%	+14
<b>Respondent occupation scale</b>								
 Self-employed	-3,7	+0,2	-68	17%	+2	-22	37%	=
Managers	-2,5	+0,5	-69	16%	+2	-11	35%	+12
Other white collars	-3,6	+0,2	-70	14%	-1	-19	31%	+1
Manual workers	-3,7	+0,7	-71	17%	+2	-18	36%	+9
House persons	-4,7	-0,3	-77	14%	-5	-24	34%	+3
Unemployed	-5	+0,7	-78	12%	=	-28	30%	+1
Retired	-3,5	+0,6	-69	18%	+5	-24	37%	+10
Students	-2,5	+0,6	-54	17%	+3	+3	36%	+14
<b>Difficulties paying bills</b>								
Most of the time	-6	-0,2	-83	11%	-4	-41	32%	-4
From time to time	-4,5	+0,2	-75	15%	=	-29	34%	+3
Almost never	-2,8	+0,7	-66	17%	+4	-10	36%	+11

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

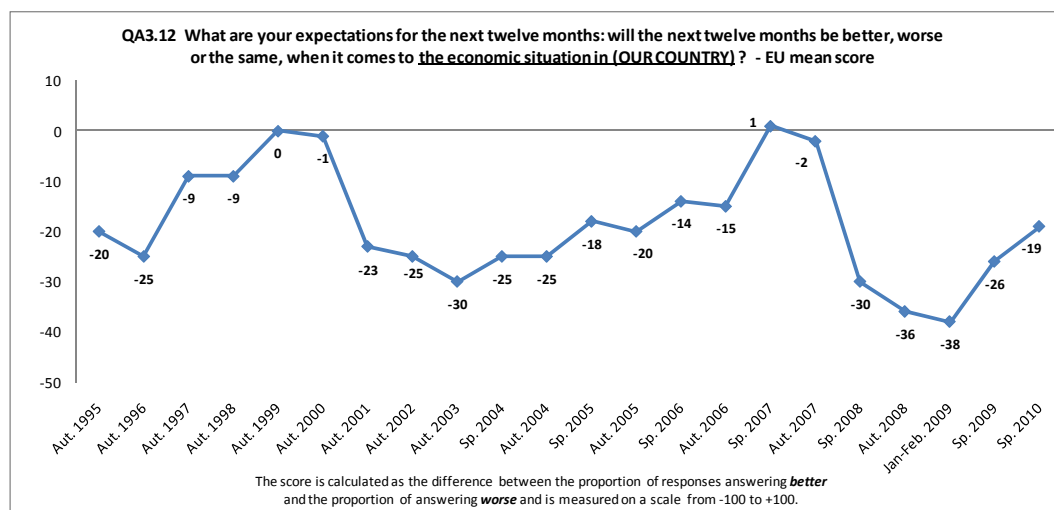
Every demographic group reports a negative impression of the general economic situation. However, improvement on the last wave of research is also almost universal. One socio-demographic group which recorded a worse assessment of the current situation than last year is the group experiencing financial difficulties 'most of the time' (with a -0.2 index point decline). The greatest increases since the last wave are recorded among manual workers (+0.7), the unemployed (+0.7) and those who almost never face difficulties paying bills (+0.7). This result confirms that the improvement is quite general, regardless of the living standard of respondents.

Results for the five-year comparison are almost uniformly negative in socio-demographic as well as in geographical terms, with a low percentage of "same" answers also evident. Here, though, the answers were in general relatively better than last year's responses, although the improvement is slight (no higher than +5 where applicable).

Levels of optimism for the coming year are also low. The only indication that things will improve was given by respondents who are still studying, and the score for this group is low (+3). Those who left school at the age of 15 or before (-29), and those who reported difficulties in paying the bills 'from time to time' (-29) and 'most of the time' (-41) are most pessimistic about the chances of improvement.

Although the picture is negative, it is interesting to compare these results with the results for respondents' personal financial situations, which are – on average – less pessimistic. It seems as if there is a clear distinction made between respondents' individual situations and the general (national) situation.

Figure 15: QA3.12 - Trend line



The trend line shows that this question has produced negative answers for the past decade and a half, with the highest score recorded in relation to expectations for the next twelve months being 1, in spring 2007. Shortly after this, levels of optimism plummeted again. However, despite the fact that the score is low, things are slowly improving. As with the indexes, it is evident here that the results are getting "less bad" as time goes on.

## 2.2 *Employment situation (QA2\_14; QA3\_15; QA4\_15<sup>9</sup>)*

Respondents are even less positive about the general employment situation than they were regarding the economic situation in their countries. The EU27 average of -4 index points (for the current situation) again reflects the very low number of Member States where respondents recorded a positive index. Unlike the general economic situation index, no Member State recorded an average score equal or of more than 1 point.

In the five-year comparison, the overall results suggest that respondents think things have got worse, with an average EU27 score of -68. Similarly, respondents expect the situation to worsen in the next twelve months; the score here is -21. All these scores show an improvement on the last survey wave: the index for the current situation is +0.4 points higher than before; the five-year comparison index has also improved slightly on last year (+2); and expectations for the next twelve months are +14 points improved on the last wave.





























Although the situation is still seen as bad, it is not as bad as it was before. At the EU level, the three indexes and their evolutions are quite close to those observed for the national economic situation.

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<sup>9</sup> QA2.14 How would you judge the current situation of... The employment situation in (our country), QA3.15 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 employment situation in (our country), QA4.15 Compared with five years ago, would you say things have improved, gotten worse or stayed about the same when it comes to...? The employment situation in (our country)

Figure 16: QA2.14, QA3.15 and QA4.15 - Score cards (index table, showing evolutions)

COUNTRY RANKING: The employment situation in (OUR COUNTRY)

		EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
				Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
		EB 73.5	EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
	EU27	-4	+0,4	-68	18%	+2	-21	36%	+14
	LU	0,9	+1,8	-58	23%	+10	-17	36%	+25
	NL	0,6	-0,2	-69	17%	-8	+3	36%	+56
	DK	0,1	-0,5	-62	17%	-13	+22	38%	+56
	AT	0	+1,7	-52	32%	+21	-1	42%	+41
	SE	-0,6	+1,8	-51	17%	+19	+46	31%	+66
	MT	-1,4	+2	-28	27%	+27	-5	39%	+30
	FI	-1,6	+0,6	-67	20%	+6	+7	44%	+47
	BE	-2,1	+0,7	-66	21%	+8	-19	41%	+16
	DE	-2,3	+1,8	-51	26%	+13	-11	39%	+42
	CY	-2,5	-1	-75	13%	-20	-49	35%	-4
	PL	-3,2	=	-29	37%	+4	-5	59%	+13
	UK	-3,5	+1,1	-72	13%	+6	-32	31%	+2
	CZ	-4,4	-0,3	-73	17%	+1	-30	40%	+21
	FR	-4,6	+0,7	-85	10%	+1	-30	32%	-3
	IT	-4,7	+0,1	-64	26%	+6	-17	39%	+7
	SK	-4,8	+0,3	-66	19%	+4	-10	37%	+45
	EE	-4,8	+0,3	-79	8%	-6	+24	33%	+61
	SI	-5,1	-1	-71	18%	+1	-33	35%	+8
	PT	-5,8	+0,4	-85	12%	-7	-46	30%	-7
	HU	-6	+0,3	-79	16%	+4	+6	41%	+65
	LT	-6,1	-0,5	-88	6%	-10	-38	35%	+4
	BG	-6,1	-1,2	-78	14%	-22	-16	38%	+23
	EL	-6,6	-0,8	-90	6%	-14	-79	13%	-29
	LV	-6,9	+0,3	-87	8%	-6	-4	46%	+33
	ES	-7	-0,6	-91	7%	-2	-30	31%	-10
	RO	-7,2	-2,3	-80	11%	-25	-57	24%	-30
	IE	-7,4	-0,6	-87	6%	-5	-37	26%	+16

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

Although there is some similarity between these results and those analysed previously in terms of the positions of Member States in the table, the geographical trends observed so far are contradicted by the responses of some countries – most notably Ireland which, despite the high scores for respondents' personal situation, sits at the bottom of **the current situation index** scorecard with a low average score of -7.4 index points.

Spain and Romania both record scores of -7 or less (-7 and -7.2 respectively) with Hungary, Lithuania, Bulgaria, Greece and Latvia also reporting very low scores. At the other end of the scale, Luxembourg, the Netherlands and Denmark are the only Member States with a positive index (0.9, 0.6 and 0.1 respectively). In terms of evolution, 15 of the 27 Member States recorded higher scores than in the last survey wave. Luxembourg, Sweden and Germany all reported indexes +1.8 points higher than last year, Austria recorded an increase of +1.7 points, and the UK recorded a score +1.1 index points higher than in the previous wave. These are the highest scores, in terms of evolution, recorded across the EU.





The lowest score for the **five-year comparison** was recorded in Spain, with a score of -91 and 7% of "same" answers. Malta and Poland recorded the least negative answers in this instance, with -28 and -29 respectively. While there has been some improvements since the last survey wave in some cases, such as Malta (+27), Austria (+21) and Sweden (+19), significant decreases were also recorded in Romania (-25), Bulgaria (-22), and Cyprus (-20).

Across the EU, opinion is sharply divided as to whether **the next twelve months** will be better or worse. Despite a low overall average of -21 on the better/worse scale, respondents in Sweden (+46), Estonia (+24) and Denmark (+22), are among the Member States which recorded a degree of confidence in the employment situation in the coming year – again, worth noting as they were the highest recorded from all of the Member States and providing a comparison to the average. On the other hand, respondents in Greece (-79), Romania (-57), and Cyprus (-49) expect the situation to worsen.

Compared to last year's results, levels of optimism for the next twelve months are high in many Member States, despite the low overall average. However, there was a decline across all three indexes in Romania, Spain, Greece and Cyprus.

Figure 17: QA2.14, QA3.15 and QA4.15 - SD tables (index table, showing evolutions)

SOCIO-DEMOGRAPHIC TABLE: The employment situation in (OUR COUNTRY)

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
	EB 73.5	EB 73.5 - EB 71.2	Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
			EB 73.5	EB 73.5 - EB 71.2	EB 73.5	EB 73.5 - EB 71.2		
EU27	-4	+0,4	-68	18%	+2	-21	36%	+14
<b>Gender</b>								
 Male	-3,8	+0,4	-66	19%	=	-18	36%	+16
Female	-4,3	+0,4	-70	18%	+4	-22	37%	+14
<b>Age</b>								
 15-24	-3,5	+0,2	-56	18%	+2	-5	40%	+9
25-39	-3,9	+0,3	-68	18%	=	-19	36%	+10
40-54	-4,2	+0,4	-71	18%	+2	-25	36%	+15
55 +	-4,2	+0,6	-71	19%	+4	-27	35%	+16
<b>Education (End of)</b>								
 15-	-5	+0,6	-73	18%	+6	-29	35%	+11
16-19	-4,2	+0,4	-70	18%	+2	-24	36%	+11
20+	-3,3	+0,2	-68	17%	-2	-14	36%	+22
Still studying	-3,1	+0,1	-52	20%	+3	-2	42%	+14
<b>Respondent occupation scale</b>								
 Self-employed	-3,7	+0,3	-68	18%	-3	-26	35%	+6
Managers	-2,7	+0,3	-65	19%	-2	-15	39%	+23
Other white collars	-3,6	+0,1	-66	20%	+3	-19	35%	+13
Manual workers	-4	+0,5	-70	18%	+1	-21	37%	+16
House persons	-5,1	-0,1	-71	19%	+3	-26	34%	+8
Unemployed	-6,2	+0,6	-82	11%	+3	-23	32%	+7
Retired	-4,3	+0,5	-69	20%	+6	-28	36%	+15
Students	-3,1	+0,1	-52	20%	+3	-2	42%	+14
<b>Difficulties paying bills</b>								
Most of the time	-6,4	-0,2	-82	13%	-4	-39	31%	+2
From time to time	-5	-0,1	-74	16%	=	-30	36%	+5
Almost never	-3,2	+0,7	-64	20%	+4	-15	37%	+20

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

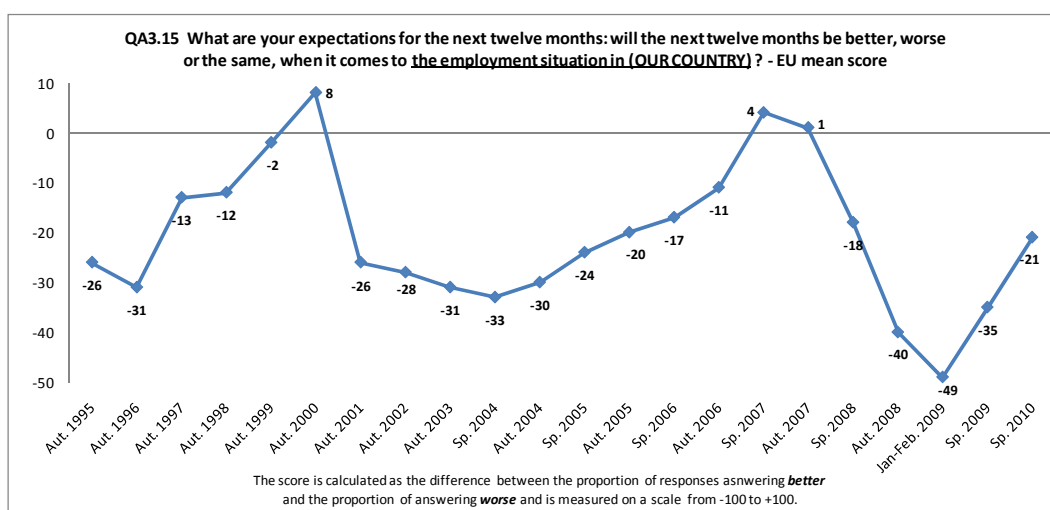
Socio-demographic analysis reveals that no matter where respondents lay on the occupation scale, their reaction to the current situation is negative, as it is across demographic categories of gender, age, education level and financial situation. The youngest age band is less negative than the older groups (-3.5, higher than the EU average, compared to 40-54 and 55+, both of which gave scores of -4.2). Those still studying have a less pessimistic outlook than those whose education ended earlier (-3.1 for students and -5 for those who finished their education before the age of 16). As well as the expected low scores from the unemployed (-6.2) and those who report financial difficulties (-6.4), even managers (-2.7), white collar workers (-3.6), the self-employed (-3.7) and those who almost never have difficulties paying bills (-3.2) report dissatisfaction with the current general employment position.

Most of these results are better than in the last survey wave. However, those who report financial difficulty 'from time to time' (-0.1 points compared to 2009), 'almost never', -0.2 compared to 2009) and house persons (-0.1 compared to 2009) reporting a worsening of the situation. Women (-4.3) report a significantly lower level of satisfaction with the current employment situation than men (-3.8).

Scores for the five-year comparison indicate that the situation was perceived as having deteriorated by all demographic groups, with only a very slight improvement (+2 points) on last year's results. Current students (-52) and the youngest age band (-56) are the least negative about this, while the unemployed and those who report frequent financial difficulties (both -82) are the most negative.

Most respondents believe that the situation will worsen over the coming 12 months (an average score of -21), though these results again show an improvement on the last survey wave.

Figure 18: QA3.15 - Trend line



Levels of optimism are not as uniformly low for this item as for the cost of living (as we will see in the next section), but the range of responses over the last decade and a half is very varied. It is also interesting to note the abrupt decline in confidence that the situation will improve. The outlook changes from tentative optimism at the end of the last century, through a phase of negativity in the first few years of the new millennium, returning to cautious optimism until spring 2007, then dropping abruptly in autumn 2008 and January-February 2009 (immediately following the crisis) and improving starting with Spring 2009. It is important to note, though, that the sharp increase caused by the last two waves disguises the fact that the overall view of the situation is still negative.



### 2.3 Cost of living (QA2\_5; QA3\_6; QA4\_6<sup>10</sup>)

We now analyse the cost of living across the EU – a topic which is closely tied to the previous two questions relating to the economic and employment situations. Given the answers previously analysed, it comes as no surprise to note another low score across the board with only four of the 27 Member States recording a positive score. However, the EU average score of -2.7 represents a +0.3 point increase on last year's result. The result for the five-year comparison showed a slight improvement across the EU of +2 points (although the overall score of -69 sits very firmly in "worse"). Despite the improvement in opinions of the current situation and the comparison with five years ago, the low "worse" score for the latter is mirrored in the result for expectations over the following year: -47 (a -8 decrease on last year's result). These expectations are worse than those recorded for the national employment and economic situation.

The score in individual Member States is very closely tied to the previous responses relating to the economic situation. The Nordic Member States of Sweden and Denmark lead the table showing **the current situation index** (with scores of 2.2 and 1.4 respectively) followed by Austria (1.3), the Netherlands (1.2) and then Germany (-0.2).

The decline from this point is quite severe, and there are only nine Member States which report an average score higher than the EU average. Romania, Greece, Hungary, Bulgaria and Portugal stand at the bottom of the table, with scores ranging from -5.2 in Portugal to -6.5 in Romania.

However, Portugal and Bulgaria – along with the majority of other Member States – report an improvement on last year's results. Some of these improvements are significant – Austria report a rise of 1.1 points, Belgium, Slovakia and Spain each report a 0.9 point increase, and Latvia a 0.8 point increase. Of the few countries which report a worsening of respondents' evaluations, Luxembourg and Romania are the most obvious, with a drop of 1.2 points in each case.





























The better/worse index scores for many Member States relating to the situation now as compared to **five years ago** reflect a low score across the board and a significantly low proportion of "same" answers. Overall, there are no countries in which respondents feel that the situation is better than it was five years ago, with Sweden's score of -26 by far the least pessimistic. Some Member States, such as Austria and Finland (+17 on last year) and Slovakia (+13 on last year) report improved figures compared to last year, but the actual position on the index remains very low. In some countries, such as Greece, with a score of -90 and 8% "same" answers, respondents are almost unanimous that things have got worse.

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<sup>10</sup> QA2.5 How would you judge the current situation of... The cost of living in (our country), QA3.6 What are your expectations for the next twelve months; will the next twelve months be better, worse or the same, when it comes to...? The cost of living in (our country), QA4.6 Compared with five years ago, would you say things have improved, gotten worse or stayed about the same when it comes to...? The cost of living in (our country)

Figure 19: QA2.5, QA3.6 and QA4.6 - Score cards (index tables, showing evolutions)

COUNTRY RANKING: The cost of living in (OUR COUNTRY)

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
	EB 73.5	EB 73.5 - EB 71.2	Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
			EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
 EU27	-2,7	+0,3	-69	19%	+2	-47	35%	-8
 SE	2,2	+0,3	-26	35%	+8	-15	59%	+11
 DK	1,4	=	-40	36%	+2	-27	58%	-9
 AT	1,3	+1,1	-50	33%	+17	-25	45%	+15
 NL	1,2	-0,2	-67	24%	-1	-54	37%	-12
 DE	-0,2	+0,3	-67	25%	+2	-55	38%	-7
 LU	-0,8	-1,2	-66	22%	-8	-44	38%	-12
 FI	-1	+0,3	-54	35%	+17	-31	61%	-2
 BE	-1,1	+0,9	-74	19%	+2	-42	38%	-7
 UK	-1,7	+0,6	-70	14%	+6	-59	23%	-16
 ES	-2,7	+0,9	-73	17%	-1	-47	34%	-18
 CZ	-3,1	=	-74	18%	+3	-65	29%	=
 SK	-3,3	+0,9	-57	24%	+13	-38	34%	+19
 EE	-3,4	-0,2	-75	11%	-5	-57	23%	-14
 CY	-3,6	+0,7	-85	10%	-3	-61	30%	=
 FR	-3,6	+0,3	-85	9%	+2	-48	30%	-15
 SI	-3,9	+0,2	-81	13%	+2	-58	29%	-5
 PL	-4	+0,2	-63	23%	+6	-39	42%	+8
 IT	-4,1	+0,6	-63	25%	+9	-27	40%	=
 MT	-4,8	+0,8	-80	9%	+1	-53	28%	-3
 IE	-4,9	+0,7	-62	14%	+10	-32	38%	+5
 LV	-5,1	+0,8	-74	17%	+7	-38	46%	=
 LT	-5,2	-0,9	-81	8%	-36	-48	36%	-5
 PT	-5,2	+0,3	-82	14%	-6	-58	27%	-18
 BG	-5,5	+0,3	-73	18%	-6	-28	40%	+12
 HU	-6,1	=	-82	14%	+7	-20	39%	+53
 EL	-6,2	-0,1	-90	8%	-12	-80	12%	-26
 RO	-6,5	-1,2	-78	11%	-24	-63	20%	-33





*The current situation index is measured on a scale from -10 to +10.  
The better-worse indexes are measured on a scale from -100 to +100.*

Optimism for **the forthcoming year** is low, although a number of countries with relatively high scores for the current situation report a high percentage of “same” answers for the twelve-month expectations item: Sweden and Denmark, for example, which lead the table, recorded “same” scores of 59% and 58% respectively.

In terms of evolution, the index is significantly higher than last year in Hungary (+53, continuing a previously-noted trend toward improvement) and Slovakia (+19). Sharp decreases in score were noted in Romania (-33) and Greece (-26).

**Figure 20: QA2.5, QA3.6 and QA4.6 - SD tables (index table, showing the evolutions)**

SOCIO-DEMOGRAPHIC TABLE: The cost of living in (OUR COUNTRY)

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
			Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
	EB 73.5	EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
EU27	-2,7	+0,3	-69	19%	+2	-47	35%	-8
<b>Gender</b>								
 Male	-2,4	+0,3	-68	20%	+1	-45	35%	-6
Female	-2,9	+0,3	-71	19%	+3	-47	34%	-7
<b>Age</b>								
 15-24	-2,1	+0,3	-59	20%	+3	-32	38%	-3
25-39	-2,9	+0,4	-71	17%	+1	-44	34%	-9
40-54	-3,1	+0,2	-73	18%	+2	-52	32%	-8
55 +	-2,4	+0,4	-70	21%	+3	-49	35%	-5
<b>Education (End of)</b>								
 15-	-3,3	+0,6	-74	19%	=	-50	35%	-7
16-19	-3,1	+0,3	-72	17%	+3	-50	32%	-7
20+	-1,8	=	-68	20%	+1	-47	35%	-10
Still studying	-1,6	+0,3	-55	22%	+7	-29	42%	-4
<b>Respondent occupation scale</b>								
 Self-employed	-3	-0,1	-70	17%	-1	-46	35%	-10
Managers	-1,3	=	-68	21%	+1	-46	35%	-12
Other white collars	-2,7	+0,2	-70	20%	=	-47	34%	-8
Manual workers	-3	+0,5	-71	18%	+3	-45	33%	-3
House persons	-3,5	=	-75	17%	-2	-49	32%	-8
Unemployed	-4,1	+0,8	-76	12%	+4	-51	29%	-7
Retired	-2,5	+0,4	-71	22%	+3	-51	35%	-7
Students	-1,6	+0,3	-55	22%	+7	-29	42%	-4
<b>Difficulties paying bills</b>								
Most of the time	-5,7	-0,1	-82	11%	-4	-56	28%	-8
From time to time	-4,1	+0,1	-75	16%	=	-48	32%	-5
Almost never	-1,5	+0,4	-66	22%	+3	-45	37%	-8

*The current situation index is measured on a scale from -10 to +10.  
The better-worse indexes are measured on a scale from -100 to +100.*

Certain socio-demographic factors influence answers to this question quite markedly. In evaluating **the current situation**, women are more acutely aware of difficulties than men (with an average score of -2.9 compared to -2.4) and the middle two age bands have a significantly lower score than the youngest and the oldest (compare -3.1 for those aged 40-54 to -2.1 for those aged 15-24). As has been noted with other sets of answers, those who are still studying are significantly less dissatisfied than those who finished their education earlier – those who are still studying record an average score of -1.6, compared to -3.3 for those who finished their education by age 15 or less.

However, the biggest variation in responses reflects respondents' personal financial position: those who suffer frequently from financial difficulties give an average score of -5.7, compared to -4.1 for those with financial problems 'from time to time' and -1.5 for respondents who 'almost never' have problems paying the bills.

Scores are up on last year's for most demographic groups, indicating that although Europeans are unhappy with the cost of living generally in 2010, things are slowly improving. This can be compared to the responses related to the situation compared to **five years ago**, which are also negative overall (with the negative results on the better/worse scale spread very evenly across the socio-demographic categories), but showing a slight improvement on last year's results.

Expectations for the **next twelve months** are also low. The indication from these answers is that, although a significant percentage of respondents expect things to remain the same, many think that the situation will get worse. The decline in these results since the last survey wave suggests that there is less confidence that the cost of living will improve in Europe in the next year. This contradicts the results for short-term expectations regarding the general economic situation and employment, both of which show some improvement.

#### **2.4 Affordability of energy (QA2\_8; QA3\_9; QA4\_9<sup>11</sup>)**

When asked to consider one specific aspect of the cost of living, the affordability of energy in their countries, respondents are more positive than they are about the general cost of living. The index for the evaluation of the current situation stands at -2, a +0.2 point increase on last year's figure. Although this figure is higher than the figures for the cost of living, the national economy and national employment, the index is still negative, suggesting that a majority of Europeans are dissatisfied with the affordability of energy in their country.

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<sup>11</sup> QA2.8 How would you judge the current situation of... How affordable energy is in (our country), QA3.9 What are your expectations for the next twelve months; will the next twelve months be better, worse or the same, when it comes to...? How affordable energy is in (our country), QA4.9 Compared with five years ago, would you say things have improved, gotten worse or stayed about the same when it comes to...? How affordable energy is in (our country)

Moreover, the five-year comparison produced a better/worse index of -56, indicating a clear impression that affordability has deteriorated. Expectations for the next twelve months show that people have little confidence in the likelihood of improvement, with a better/worse index of -37. Both better/worse index scores are very low; the five-year comparison index is also -1 point worse than in the last survey wave, and the twelve-month forecast index is -9 points lower than before.

The geographical patterns – such as the positive responses recorded in, for example, the Nordic and Benelux Member States - which we have observed so far in responses to economic and cost-of-living related questions do not all apply to the evaluation of **the current situation** in this instance. Estonia heads the table, with a score of 4.4, followed by the Czech Republic with 3.2, Latvia with 2.9, and the Netherlands and Austria both on 1.2.

Sweden, Finland and Denmark are further down the table, with Finland and Sweden both reporting negative scores (-1 and -1.2 respectively). Romania (-5.3), Greece (-5.8) and Hungary (-6), all of which reported low scores in response to questions relating to other aspects of the financial and employment situations, make up the bottom of the table.





























Although overall the scores are slightly better than last year, the results are very varied, some Member States reporting decreases in affordability and some noting sharp increases. A significant example of this is Bulgaria, where the average answer (-0.3) represents a +5.6 point increase on last year's score – by far the biggest national increase on the current evaluation indexes, all dimensions included. Slovakia and Finland (both +1.2) and Austria (+1.1) also showed signs of improvement on last year. In contrast, Lithuania (-1.6), Sweden and Romania (both -1.3) both reported significant decreases in the affordability of energy since the last survey wave.

Opinions on the situation now as compared to **five years ago** are sharply divided from Member State to Member State. The scores range from mildly positive (+14 in Estonia) to extremely negative (-91 in Lithuania). Estonia's positive score is notable for being the only such score in this index, although some Member States, such as Latvia (-6) and the Czech Republic (-8), are only slightly negative.

A key factor conditioning scores for the five-year comparison is the fact that the percentage of "same" answers varies greatly from country to country. Responses range from 6% in Lithuania (with a corresponding low score on the better/worse scale of -91, indicating an almost unanimous same/worse response) to 67% in Latvia.

Figure 21: QA2.8, QA3.9 and QA4.9 - Score cards (index table, showing evolutions)

COUNTRY RANKING: How affordable energy is in (OUR COUNTRY)





	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
	EB 73.5	EB 73.5 - EB 71.2	Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
			EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
 EU27	-2	+0,2	-56	26%	-1	-37	40%	-9
 EE	4,4	+0,6	+14	63%	+2	+8	69%	+7
 CZ	3,2	=	-8	55%	+2	-9	64%	=
 LV	2,9	-0,3	-6	67%	-3	-4	74%	-1
 NL	1,2	+0,9	-46	32%	+12	-39	46%	-19
 AT	1,2	+1,1	-44	40%	+17	-27	45%	+11
 ES	1,1	-0,6	-16	47%	-22	-13	59%	-24
 DK	0,6	-0,5	-43	42%	-5	-29	57%	-4
 LU	0,5	+0,5	-61	23%	+1	-41	37%	-7
 BG	-0,3	+5,6	-35	45%	+39	-12	57%	+36
 FI	-1	+1,2	-61	31%	+8	-42	48%	=
 SE	-1,2	-1,3	-53	21%	-18	-19	52%	+1
 DE	-1,6	+0,5	-74	18%	=	-59	30%	-13
 SK	-1,6	+1,2	-33	42%	+24	-21	50%	+15
 SI	-2,2	-0,9	-67	21%	-8	-51	34%	-17
 UK	-2,3	+1	-69	16%	+1	-46	31%	-12
 FR	-2,5	-0,5	-67	18%	-11	-42	32%	-24
 BE	-2,7	+0,1	-66	21%	+6	-37	40%	-12
 IT	-2,7	+0,2	-40	36%	+8	-15	47%	+2
 IE	-3,4	+0,3	-49	22%	-1	-26	42%	-1
 PL	-3,4	+0,2	-57	27%	+6	-37	45%	+3
 PT	-4,6	+0,1	-75	19%	-10	-53	33%	-20
 CY	-4,8	-0,4	-86	8%	-2	-66	25%	-8
 MT	-4,8	+0,1	-79	9%	-10	-49	26%	-11
 LT	-5,3	-1,6	-91	6%	-13	-65	24%	-18
 RO	-5,3	-1,3	-68	20%	-14	-52	31%	-26
 EL	-5,8	-0,8	-84	10%	-18	-71	21%	-28
 HU	-6	-0,1	-85	10%	+3	-21	36%	+49

*The current situation index is measured on a scale from -10 to +10.  
The better-worse indexes are measured on a scale from -100 to +100.*

The same can be said, to a lesser extent, on the expectations for the forthcoming **twelve months**. There is little confidence that things will get better – the only positive score was recorded by Estonia (8+) – and respondents in some Member States, including Greece (-71), Cyprus (-66) and Lithuania (-65) are very pessimistic about the chances of improvement. However, as negative as these results are, in some instances they represent a great improvement on the last survey wave. The twelve-month forecast index is up by +49 on the last wave in Hungary, and Bulgaria recorded a +36 increase. In Greece (-28), Romania (-26), Spain and France (both -24) expectations of improvement have declined.

**Figure 22: QA2.8, QA3.9 and QA4.9 - SD tables (index tables, showing evolutions)**

SOCIO-DEMOGRAPHIC TABLE: How affordable energy is in (OUR COUNTRY)

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
			Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
	EB 73.5	EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
EU27	-2	+0,2	-56	26%	-1	-37	40%	-9
<b>Gender</b>								
 Male	-1,8	+0,1	-55	27%	-3	-38	40%	-11
Female	-2,1	+0,3	-56	25%	=	-37	40%	-9
<b>Age</b>								
 15-24	-0,9	=	-38	27%	-1	-23	42%	-8
25-39	-2	+0,1	-53	27%	-2	-33	40%	-10
40-54	-2,3	+0,2	-61	25%	-1	-41	40%	-11
55 +	-2,1	+0,3	-61	26%	=	-42	39%	-7
<b>Education (End of)</b>								
 15-	-2,6	+0,2	-59	27%	-3	-41	39%	-8
16-19	-2,3	+0,2	-60	24%	-2	-39	38%	-11
20+	-1,5	=	-57	27%	-2	-37	42%	-10
Still studying	-0,6	-0,1	-34	29%	=	-19	44%	-7
<b>Respondent occupation scale</b>								
 Self-employed	-2	+0,4	-55	27%	-3	-36	42%	-11
Managers	-1,4	-0,1	-59	26%	=	-38	42%	-12
Other white collars	-1,9	=	-56	27%	-1	-35	41%	-14
Manual workers	-2,3	+0,2	-57	26%	-2	-37	39%	-8
House persons	-2,2	-0,1	-56	27%	-7	-41	39%	-15
Unemployed	-2,3	+0,7	-54	25%	+3	-36	40%	-6
Retired	-2,3	+0,2	-63	26%	-2	-44	38%	-9
Students	-0,6	-0,1	-34	29%	=	-19	44%	-7
<b>Difficulties paying bills</b>								
Most of the time	-4	+0,2	-66	22%	-6	-44	35%	-9
From time to time	-2,8	=	-57	26%	=	-37	38%	-8
Almost never	-1,3	+0,2	-55	27%	-2	-36	42%	-9

*The current situation index is measured on a scale from -10 to +10.  
The better-worse indexes are measured on a scale from -100 to +100.*

There are evident differences of opinion between socio-demographic categories. On the current situation index, the youngest age band reported a significantly better figure (-0.9) than the other three age groups (-2 to -2.3). Symmetrically, students have an index higher than those from the other occupation category (-0.6). It should be noted that these categories are less likely to be directly involved in the payment of energy bills. The contrast between respondents who reported difficulties paying the bills 'most of the time' (-4) and the other two groups ('from time to time', -2.8; 'almost never', -1.3) is also obvious.

Overall, scores for individual demographic groupings are higher this year than in the last survey wave, with the lowest scores coming from students and managers. The unemployed in particular reported an improvement in the affordability of energy, with an average score +0.7 points higher than in the last wave.

The percentage of "same" answers to the five-year comparison and the twelve-month forecast questions are very evenly spread – with a relatively small percentage of "same" answers for the first of these. The better/worse index for the five-year comparison is uniformly low, as are the scores for the twelve-month forecast. Scores for this last question have fallen overall since the last survey wave, indicating a general decline in optimism.

## ***2.5 Affordability of housing (QA2\_9; QA3\_10; QA4\_10<sup>12</sup>)***

The overall EU score for the current situation index on the affordability of housing is -2.7, but it represents an increase on last year's score of +0.4.

Although the better/worse index for the five-year comparison, at -52, is in the "worse" category, it is up +3 on last year's score. However, optimism for the forthcoming twelve months is low: the better/worse index is again negative (though higher than the cost of living and energy affordability indexes), standing at -27, a decline of -5 on last year's figure.





























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<sup>12</sup> QA2.9 How would you judge the current situation of... How affordable housing is in (our country), QA3.10 What are your expectations for the next twelve months; will the next twelve months be better, worse or the same, when it comes to...? How affordable housing is in (our country), QA4.10 Compared with five years ago, would you say things have improved, gotten worse or stayed about the same when it comes to...? How affordable housing is in (our country).



Figure 23: QA2.9, QA3.10 and QA4.10 - Score cards (index tables, showing evolutions)

## COUNTRY RANKING: How affordable housing is in (OUR COUNTRY)

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
	EB 73.5	EB 73.5 - EB 71.2	Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
			EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
 EU27	-2,7	+0,4	-52	29%	+3	-27	46%	-5
 DK	1,6	+0,7	-18	46%	+11	-13	67%	-8
 EE	1,6	+0,5	-7	39%	-9	+2	65%	+6
 SE	0,7	-0,4	-29	36%	+1	-29	55%	-7
 AT	0,6	+0,8	-41	44%	+14	-18	51%	+20
 DE	0,5	-0,2	-31	49%	-2	-24	58%	-6
 LV	0,5	-0,2	-6	46%	-10	0	69%	-1
 NL	-0,2	-0,3	-56	30%	-2	-37	45%	-18
 CZ	-1,2	+0,1	-31	38%	+2	-28	51%	+1
 BG	-1,2	+5,2	-32	42%	+32	-8	57%	+25
 FI	-1,7	+0,3	-57	36%	+12	-37	54%	-1
 BE	-2,1	+0,8	-63	27%	+9	-34	48%	-11
 IE	-3,1	+1,3	-14	17%	+25	+3	41%	+7
 UK	-3,1	+0,5	-62	17%	+1	-30	38%	-11
 FR	-3,3	+0,7	-71	18%	=	-34	40%	-17
 SK	-3,4	+0,6	-33	32%	+27	-22	46%	+16
 IT	-3,6	+0,6	-48	35%	+9	-17	48%	+1
 ES	-4,1	+1,2	-64	18%	+5	-28	40%	-7
 LU	-4,2	=	-70	18%	+1	-31	41%	-14
 PT	-4,3	=	-64	24%	-6	-48	36%	-19
 SI	-4,4	-0,4	-61	19%	+5	-33	36%	-2
 MT	-4,6	+0,4	-67	17%	-4	-41	36%	-2
 HU	-5,1	=	-81	14%	+2	-18	40%	+50
 EL	-5,1	-0,2	-71	19%	-6	-54	29%	-11
 PL	-5,3	-0,3	-57	24%	+2	-27	48%	-3
 RO	-5,7	-0,3	-58	20%	-10	-45	33%	-23
 LT	-5,9	-0,3	-71	10%	-2	-41	37%	-12
 CY	-6,5	+1	-90	6%	+2	-57	34%	-8

The current situation index is measured on a scale from -10 to +10.  
The better-worse indexes are measured on a scale from -100 to +100.

Given the different conditions in the EU Member States, it comes as no surprise that the results for this question vary significantly from country to country.

For **the current situation** index, the six top scoring Member States record low positive scores: from 1.6 in Denmark and Estonia, 0.7 in Sweden, 0.6 in Austria and 0.5 in Latvia and Germany. There is a steady decline to the lowest score of -6.5, recorded by respondents in Cyprus.

Although the overall average score has risen slightly since the last wave, there are again several instances of small decreases: the index is down -0.4 in Slovenia, and -0.3 in Poland, Romania and Lithuania. There are also some very significant increases, namely in Bulgaria (+5.2 on the last survey wave), Ireland (+1.3), Spain (+1.2) and Cyprus (+1). As with the energy affordability question, there seems to be a significant improvement in Bulgaria specifically; although the scores are still relatively low, they are far better than before.






The situation is generally seen as worse that it was **five years ago**. Although there are no positive scores recorded, some Member States are significantly less downbeat than others – for example, Latvia and Estonia record scores of -6 and -7 respectively, compared to the lowest scores from Cyprus (-90), Lithuania, Greece and France (all -71).

Significant improvements of this index since last year's survey are reported in Bulgaria (+32), Slovakia (+27) and Ireland (+25), although it is important to note that despite these improvements since the last survey, the actual better/worse scores are still low.

The wide range of "same" answers given in response to the five-year comparison question is also notable. Where the percentages of these answers are very low (for example, 6% in Cyprus and 10% in Lithuania) the better/worse index records a significantly worse score. The same can be said about the answers to the question relating to the situation in **one year's time**, although there are some significant improvements, for example in Hungary, where the low score of -18 is tempered by the fact that it is 50 points higher than last year's.

Figure 24: QA2.9, QA3.10 and QA4.10 - SD tables (index tables, showing evolutions)

SOCIO-DEMOGRAPHIC TABLE: How affordable housing is in (OUR COUNTRY)

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
			Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
	EB 73.5	EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
EU27	-2,7	+0,4	-52	29%	+3	-27	46%	-5
<b>Gender</b>								
 Male	-2,5	+0,4	-51	30%	+3	-26	47%	-5
 Female	-2,9	+0,4	-55	27%	+3	-30	44%	-6
<b>Age</b>								
 15-24	-2,3	+0,3	-42	28%	+4	-17	47%	-2
25-39	-3,1	+0,4	-53	26%	+4	-27	44%	-8
40-54	-3	+0,3	-57	28%	+1	-31	48%	-7
55 +	-2,4	+0,4	-53	31%	+3	-32	45%	-5
<b>Education (End of)</b>								
 15-	-3	+0,5	-56	28%	+2	-33	44%	-5
16-19	-2,9	+0,4	-55	27%	+3	-30	44%	-6
20+	-2,6	=	-52	29%	=	-27	48%	-10
Still studying	-1,9	+0,5	-39	31%	+5	-12	50%	=
<b>Respondent occupation scale</b>								
 Self-employed	-2,9	+0,1	-53	30%	+1	-29	46%	-13
Managers	-2,3	=	-54	28%	-2	-26	48%	-11
Other white collars	-3	=	-51	30%	+3	-29	46%	-13
Manual workers	-2,9	+0,5	-56	26%	+2	-27	45%	-3
House persons	-3,1	+0,4	-54	26%	+2	-34	43%	-5
Unemployed	-3,7	+1	-59	24%	+5	-29	41%	+1
Retired	-2,5	+0,3	-52	31%	+4	-32	45%	-5
Students	-1,9	+0,5	-39	31%	+5	-12	50%	=
<b>Difficulties paying bills</b>								
Most of the time	-4,9	+0,1	-69	20%	-1	-40	38%	-5
From time to time	-3,6	+0,4	-57	27%	+4	-33	42%	-5
Almost never	-2	+0,3	-48	30%	+3	-24	49%	-7

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

The EU27 average conceals a wide variety of answers across demographic groups. Although the overall scores tend to be negative, there is a slight increase since the last survey wave; every single average score for all groups is higher than or, in a few cases, equal to that recorded in the last report.

Women see the situation as worse than men do, with a score of -2.9 compared to -2.5. The youngest age group (who sometimes pay no rent) and the oldest band (who are more likely to own their homes) have a slightly better perception of affordability than respondents aged between 25 and 54, with those aged 25-39 least positive about the situation, recording a score of -3.1. Correlating with the score of the youngest respondents, students are the most upbeat about the current situation with a score of -1.9, compared with -3 for those who finished their education before the age of 16, and -3.7 (up +1 point on last year) for the unemployed.

Again, the biggest difference is between respondents who have frequent financial difficulties (-4.9), those who only have difficulties 'from time to time' (-3.6) and those who 'almost never' have problems paying their bills (-2).

Relatively few respondents think that the situation is the same as it was five years ago, and these answers are spread fairly evenly across the socio-demographic groups. The better/worse index indicates an average score of around -50 to -55 across the board, with a few exceptions – such as students, who have an average score of -39, and those who have problems paying the bills, who report an average score of -69 (with a "same" answer proportion of 20%). This represents a very slight increase compared to the situation one year ago – of one to five points – in almost all cases.

As we have seen in many other questions relating to whether the general situation will get better or worse in the next twelve months, a significant proportion of respondents across all groups feel that it will remain the same (an average score of 46%). However, the better/worse index scores for this question also indicate that those who think it will change are not tremendously optimistic about the chances for improvement.

## ***2.6 The way the public administration is run (QA2\_10; QA3\_11; QA4\_11<sup>13</sup>)***





























Respondents have then been asked about the way public administration is run in their country. On this issue, overall, EU opinion has remained relatively stable since last year, with an average score of -1.3, representing a decrease of -0.1 index points since the previous survey. Only a slight change is recorded in the five-year comparison and the twelve-month forecast, though in both cases this change is downwards (-3 and -4 respectively). Significantly, there is a high percentage of "the same" answers on average in response to this question. Although the overall answers are still downbeat and into the minus numbers, the answers to this particular question are the least negative of all the questions relating to the general situation.

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<sup>13</sup> QA2.10 How would you judge the current situation of... The way public administration runs in (our country), QA3.11. 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 way public administration runs in (our country). QA4.11. Compared with five years ago, would you say things have improved, gotten worse or stayed about the same when it comes to...? The way public administration runs in (our country).

Figure 25: QA2.10, QA3.11 and QA4.11 - Score cards (index tables, showing evolutions)

## COUNTRY RANKING: The way public administration runs in (OUR COUNTRY)

		EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
				Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
				EB 73.5	EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2	EB 73.5
	EU27	-1,3	-0,1	-28	52%	-3	-15	57%	-4
	SE	2	+0,5	-9	58%	+5	+3	76%	+12
	AT	1,7	+0,5	-9	69%	+11	-4	72%	+12
	LU	1,6	+0,1	+4	66%	+3	+6	69%	+3
	EE	1,4	-0,1	+10	56%	+6	+9	66%	+16
	DK	1,2	-0,4	-32	46%	-10	-27	55%	-21
	DE	1	-0,2	-19	69%	-3	-18	70%	-10
	FI	0,9	-0,5	-20	64%	-4	-9	77%	+4
	BE	0,1	-0,3	-15	64%	-4	-6	52%	+5
	UK	-0,4	+1,1	-30	43%	+5	-14	46%	-2
	NL	-0,6	-0,4	-34	50%	-9	-16	48%	-1
	MT	-0,6	+0,4	-13	42%	-1	-4	55%	+3
	SK	-0,9	+0,2	-18	54%	+3	-6	56%	+10
	CZ	-1	+0,1	-23	52%	+2	-12	63%	+6
	CY	-1,1	+0,3	-13	62%	-12	-13	75%	-9
	SI	-1,2	-1,5	-32	42%	-6	-18	57%	-2
	FR	-1,3	-0,2	-38	49%	-9	-17	58%	-9
	ES	-1,3	-0,1	-29	54%	-16	-17	59%	-15
	PL	-1,7	+0,1	-6	59%	+3	+1	70%	+6
	HU	-2,2	+0,2	-36	45%	+6	+9	48%	+41
	BG	-2,2	+0,2	-21	49%	-12	+5	57%	+8
	IT	-2,8	+0,4	-31	46%	+9	-13	51%	+3
	LT	-3	-1	-39	42%	-15	-15	61%	-6
	PT	-3,5	-0,4	-42	38%	-9	-32	49%	-19
	IE	-4,1	-0,1	-47	34%	=	-21	53%	+3
	LV	-5,6	-0,6	-45	38%	=	-3	59%	+5
	EL	-6	-1	-62	27%	-15	-49	33%	-14
	RO	-6	-2,4	-58	27%	-34	-44	37%	-32

The current situation index is measured on a scale from -10 to +10.  
The better-worse indexes are measured on a scale from -100 to +100.





The top-ranking countries in this table – including Sweden (with a score of 2), Austria (1.7), Luxembourg (1.6), Estonia (1.4) and Denmark (1.2) have been high up the overall rankings for many of the indexes evaluating of the **current situation** throughout this survey wave. Though the index on how public administration is run shows a slightly negative trend across the majority of the Member States, the top-ranking countries in this table report positive scores -Sweden (2), Austria (1.7), Luxembourg (1.6), Estonia (1.4) and Denmark (1.2). The top 13 Member States report a score of -1 or above, indicating an overall degree of positivity.

Opinions of the situation compared to **five years ago** vary across Member States. Estonia (+10) and Luxembourg (+4) report positive scores. Some others (Poland with -6, Sweden and Austria with -9) report negative scores. Others, such as Greece (-62) and Romania (-58), report very low scores, although in comparison to other questions regarding the general situation, these are not quite as negative as we might expect.

Overall, the five-year comparison shows a higher proportion of “same” answers – 52% across all Member States – than the other questions in this category. As the overall ranking for each Member State goes down, the percentage of “same” answers tends to go down alongside it, and the better/worse index score (-28 overall) decreases in tandem. Greece and Romania both give negative results on this question, each returning a “same” answer percentage of 27% and scoring -62 and -58 on the better/worse index respectively. A large proportion of respondents also said they expected things to remain the same over **the forthcoming twelve months** – 57% overall, with this figure rising as high as 77% (Finland), 76% (Sweden) and 75% (Cyprus). Elsewhere, optimism is low, with an average score of -15 across the EU Member States and only a few countries – Estonia (+9), Hungary (+9), Luxembourg (+6), Bulgaria (+5), Sweden (+3) and Poland (+1) recording positive scores for this index.

Figure 26: QA2.10, QA3.11 and QA4.11 - SD tables (index table, showing the evolutions)

SOCIO-DEMOGRAPHIC TABLE: The way public administration runs in (OUR COUNTRY)

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
			Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
	EB 73.5	EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
EU27	-1,3	-0,1	-28	52%	-3	-15	57%	-4
<b>Gender</b>								
 Male	-1,2	=	-28	53%	-5	-15	58%	-4
Female	-1,3	-0,1	-28	51%	-1	-15	56%	-3
<b>Age</b>								
 15-24	-0,7	-0,1	-16	49%	-4	-6	56%	-3
25-39	-1,6	+0,1	-27	52%	-3	-12	58%	-2
40-54	-1,6	-0,1	-33	51%	-4	-19	57%	-6
55 +	-1	-0,2	-30	52%	-2	-19	57%	-5
<b>Education (End of)</b>								
 15-	-1,6	-0,2	-33	51%	-2	-20	56%	-6
16-19	-1,5	-0,1	-30	51%	-1	-16	57%	-4
20+	-0,9	-0,2	-26	55%	-7	-14	59%	-5
Still studying	-0,4	+0,2	-13	50%	-5	-2	58%	=
<b>Respondent occupation scale</b>								
 Self-employed	-1,8	=	-30	51%	-3	-16	55%	-7
Managers	-0,7	-0,2	-25	56%	-7	-15	59%	-6
Other white collars	-1,3	=	-27	49%	-4	-15	56%	-6
Manual workers	-1,6	-0,1	-30	52%	-2	-14	59%	-2
House persons	-2	-0,4	-34	49%	-5	-21	52%	-8
Unemployed	-2,2	+0,1	-33	47%	-2	-19	54%	-5
Retired	-0,8	-0,1	-31	53%	-5	-17	59%	-4
Students	-0,4	+0,2	-13	50%	-5	-2	58%	=
<b>Difficulties paying bills</b>								
Most of the time	-3,6	-0,5	-43	41%	-3	-25	49%	-4
From time to time	-2,2	-0,2	-36	46%	-4	-19	53%	-5
Almost never	-0,5	=	-22	56%	-3	-11	60%	-3

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

Although there are some socio-demographic differences in relation to the current situation, these variations are not as pronounced as those seen elsewhere in the report. Men and women view the situation fairly similarly. The most negative answers come from those who experience frequent difficulties in paying their bills (-3.6), the unemployed (-2.2) and the self-employed (-1.8). A similar pattern emerges in the answers on the five-year comparison and the twelve-month forecast.

## CONCLUSIONS

All the subjects covered in this chapter (economic situation, employment situation, cost of living, affordability of energy, affordability of housing and the way public administration is run) recorded negative scores for all three dimensions at European level: current situation, situation compared with five years ago and expectations for the coming 12 months.

Although many of the questions asked in this chapter are similar to those from the 'personal situation' section - financial concerns, employment - the responses are very different: respondents make clearly the difference between their personal situation and the situation of their country as a whole. This suggests also that when it comes to the situation in their country, Europeans are less optimistic than about their own situation.

For all six topics analysed here, the scores for the current situation are negative for almost all the countries surveyed. However, there are some countries who recorded positive scores in at least four of the six topics: Sweden, Luxembourg, the Netherlands, Denmark and Austria, the only country with positive scores for five topics (except for employment). Even if the majority of the indexes for current situation are negative, there are some significant improvements since last year, when the first wave was conducted. Malta recorded the biggest increased (+2.2), followed by Denmark, Luxembourg and Sweden (+1.8 for all three countries), Austria (+1.7) and UK (+1.1); the biggest decrease being in Cyprus (-1) and Slovenia (-1).

The situation now compared with five years ago looks worse for all the topics: negative scores are recorded in all countries. Two exception though: Estonia, who recorded positive scores for affordability of energy (+14) and the way public administration is run (+10) and Luxembourg (+4 for the latest topic).

Europeans are not very optimistic about the situation in their countries in the next 12 months either. However, the scores show that the respondents are more confident in the future than in the situation as it is now when it comes to the economic situation; seven countries recording positive indexes: Sweden (with the biggest score recorded, +42), Austria, Finland, Denmark, Poland, Estonia and Hungary. Employment is the other topic for which six countries registered positive indexes: Sweden recorded again the biggest score, followed by Estonia, Denmark, Malta, the Netherlands and Hungary,

Despite the overall low scores and diminished level of satisfaction with the general situation, the evolution of the data shows an improvement on the last wave for almost all aspects, although people appear to have become often more pessimistic about the near future than they were one year ago (on four out of the six topics analysed: cost of living, affordability of energy, affordability of housing, and the way public administration runs).



### 3. SOCIAL PROTECTION AND INCLUSION

For the final group of questions, we considered aspects of social protection and inclusion. Opinion of these aspects of EU life was measured in the same way as for all the previous questions; the topics covered are provision of health care, provision of pensions, unemployment benefits, relations between people from different cultural backgrounds, and the way inequalities and poverty are addressed in each Member State.

#### 3.1 Health care provision (QA2\_2; QA3\_3; QA4\_3<sup>14</sup>)





























The EU27 index for the evaluation of national health care provision is positive 1.3 points – the same in this wave as in the 2009 wave. However, despite the fact that the current situation is seen as relatively positive, it is also believed to have worsened over the last five years, and expected to continue to worsen over the next twelve months. For the five-year comparison, the EU27 average is -29 on the better/worse index (a -2 decrease on last year's results). Optimism for the next twelve months is also low; the better/worse index of -19 for this dimension is -5 below the score from the 2009 survey.

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<sup>14</sup> QA2.2 How would you judge the current situation in each of the following? Health care provision in (OUR COUNTRY), QA3.3 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 healthcare system in (OUR COUNTRY), QA4.3 Compared with five years ago, would you say things have improved, gotten worse or stayed about the same when it comes to...? The healthcare system in (OUR COUNTRY)

Figure 27: QA2.2, QA3.3 and QA4.3 - Score cards (index tables, showing evolutions)

COUNTRY RANKING: Health care provision in (OUR COUNTRY)

		EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
				Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
				EB 73.5	EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2	EB 73.5
	EU27	1,3	=	-29	44%	-2	-19	54%	-5
	BE	5,3	-0,2	+3	67%	-6	-1	71%	-6
	LU	5,2	+0,2	+13	64%	+1	-3	61%	-4
	NL	4,6	-0,5	-28	46%	-9	-41	46%	-19
	AT	4,6	-0,1	-8	61%	+10	-4	64%	+7
	UK	4,4	+0,1	-1	49%	+3	-9	56%	-7
	SE	3,9	+0,3	-15	46%	+7	+4	68%	+18
	MT	3,2	+0,5	+36	22%	+27	+19	47%	+13
	DK	2,9	-0,3	-21	45%	-8	-24	52%	-24
	FI	2,9	-0,2	-13	54%	+8	-14	71%	+5
	FR	2,7	+0,1	-36	42%	-5	-20	54%	-9
	ES	2,7	+0,4	-1	55%	-11	-3	64%	-16
	CZ	2,3	+0,8	-15	48%	+5	-16	59%	-1
	SI	1,3	+0,4	-43	41%	-1	-28	52%	-3
	DE	1,3	+0,3	-58	31%	+4	-50	39%	-9
	EE	0,8	+0,2	-1	42%	-1	+8	57%	+35
	CY	0,6	+0,4	+11	46%	-7	-6	66%	-14
	SK	0,5	+0,8	-25	48%	+15	-7	58%	+19
	IT	-0,3	-0,2	-26	54%	+3	-7	57%	-2
	LT	-1,2	-0,1	-46	38%	-8	-22	56%	+3
	IE	-1,5	+0,2	-49	25%	-2	-30	47%	+5
	PT	-1,5	-0,5	-29	36%	-11	-24	51%	-20
	HU	-1,9	+0,2	-49	36%	+12	+10	56%	+47
	PL	-2,3	-0,6	-26	50%	+1	-9	65%	+5
	LV	-2,7	-0,9	-54	26%	-21	-25	54%	+10
	BG	-2,9	+0,5	-57	31%	-13	-10	51%	+7
	EL	-3,6	-0,5	-57	30%	-16	-46	38%	-19
	RO	-4,2	-1,2	-65	19%	-30	-45	34%	-37

The current situation index is measured on a scale from -10 to +10.  
The better-worse indexes are measured on a scale from -100 to +100.

17 of the 27 Member States recorded a positive score for the index on the **current situation** – the top of the table is dominated by Belgium, Luxembourg and the Netherlands, with high scores of 5.3, 5.2 and 4.6 respectively. They are joined by Austria, the UK, Sweden, Finland and Denmark. Respondents in Malta also gave a positive high average score of 3.2.

Behind the stability at EU level, we observe some evolutions at country level, although these are relatively limited. Some slight decreases are noticed among the highest-scoring countries, not least Belgium which – despite topping the table with 5.3 – recorded a score -0.2 points lower than in the last wave. There were significant decreases in Romania (-1.2) and Latvia (-0.9). In contrast, significant increases were recorded in the Czech Republic and Slovakia (both +0.8), and Bulgaria (+0.5, despite a low score of -2.9 overall) as well as in Malta (+0.5).






When respondents are asked how they see the situation now compared to **five years ago**, there are a few positive responses despite the overall degree of negativity: Malta (+36) Luxembourg (+13), Cyprus (+11) and Belgium (+3) all report “better” scores on the index – although these are the only positive responses in this particular index. Romania (-65), Bulgaria and Greece (both -57) all report a significantly “worse” score on the index.

Compared to the last wave of analysis, the most striking increases are those recorded in Malta (+27), Slovakia (+15, taking the score to -25) and Hungary (+12, taking the score to -49). The most striking decreases are recorded in Romania (-30), Latvia (down -21 to a score of -54) and Greece (-16).

The highest scores for optimism for **the forthcoming twelve months** came in Malta (19), Hungary (10) and Estonia (8). The highest levels of pessimism are in Germany (-50), Greece (-46) and Romania (-45). There are some striking increases on the last wave of analysis, notably in Hungary (+47) and Estonia (+35). Sharp decreases were noted in Romania (-37) and Denmark (-24).

Figure 28: QA2.2, QA3.3 and QA4.3 - SD tables (index tables, showing evolutions)

SOCIO-DEMOGRAPHIC TABLE: Health care provision in (OUR COUNTRY)

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
			Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
	EB 73.5	EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
EU27	1,3	=	-29	44%	-2	-19	54%	-5
<b>Gender</b>								
 Male	1,4	-0,1	-27	45%	-2	-20	55%	-7
 Female	1,1	=	-30	43%	-2	-19	53%	-5
<b>Age</b>								
 15-24	1,8	=	-10	45%	-1	-4	58%	-5
25-39	1	=	-29	43%	-4	-15	54%	-5
40-54	1	=	-36	42%	-1	-26	51%	-7
55 +	1,5	+0,1	-32	46%	-1	-24	53%	-5
<b>Education (End of)</b>								
 15-	1	-0,1	-31	47%	-5	-20	55%	-8
16-19	1	=	-33	42%	-2	-21	52%	-7
20+	1,7	=	-30	44%	-2	-23	52%	-5
Still studying	2,1	-0,1	-8	46%	-1	-3	58%	-3
<b>Respondent occupation scale</b>								
 Self-employed	1	+0,2	-28	46%	+1	-23	52%	-9
Managers	2	=	-30	41%	+1	-25	54%	-5
Other white collars	1,3	+0,2	-31	42%	-3	-21	53%	-8
Manual workers	1,1	=	-30	44%	-1	-17	54%	-4
House persons	0,5	-0,5	-34	44%	-10	-22	51%	-9
Unemployed	0,6	+0,3	-32	41%	-2	-17	52%	-10
Retired	1,4	-0,1	-32	46%	-2	-24	53%	-6
Students	2,1	-0,1	-8	46%	-1	-3	58%	-3
<b>Difficulties paying bills</b>								
Most of the time	-0,9	-0,5	-42	38%	-1	-23	50%	-5
From time to time	0,3	-0,1	-35	42%	-5	-21	52%	-7
Almost never	2,1	+0,1	-24	46%	=	-18	55%	-6

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

Scores broken down by socio-demographic groupings are consistently positive in almost all instances, although not particularly high. The only negative score relating to the current situation (-0.9) is given by those who frequently suffer financial difficulties (as has been observed in just about every other group of questions analysed so far). It can be seen that those who almost never face difficulties paying bills are comparatively far more satisfied (2.1). There are few differences between these results and those of the previous wave.

It is generally considered that the situation is worse now than it was five years ago, although the youngest age band responded more positively to this question, with a better/worse score of -10, than did the older age groups (-36 for those aged 40-54, and -32 for the 55+ group). Results from house persons in the five-year comparison are down by -10 points.

Finally, in terms of education, levels of optimism about the next twelve months are low across all socio-demographic groups: scores on this question for every group are negative on the better/worse index. There are distinct differences between age groups, with the 15-24 age band being less pessimistic (with a score of -4) than the others, each of which recorded a score of -15 or less. Although we see that those who are still studying are the least pessimistic (-3 compared to scores uniformly below -20), the previously-observed pattern of negative responses from those who finished their education soonest is not repeated here. This group is less pessimistic (-20) than the remaining two groups. All groups show a decrease in relation to the last survey wave.

### ***3.2 Provision of pensions (QA2\_3; QA3\_4; QA4\_4<sup>15</sup>)***

Opinion regarding the provision of pensions is negative. The overall EU average is (-1.2), representing a decrease of -0.2 on last year's results. The overall average answer for the five-year comparison is also very low: a "better-worse" index of -42 and a relatively low percentage of "same" answers (37%). Compared to last year's data, this represents a decrease of -9. When respondents were asked about their expectations for the next twelve months, the percentage of "same" answers is 43% and the overall "better-worse" index is -34. This year's result is down by -11 compared to the 2009 wave.





























This question saw the largest proportional decrease in the general index score of all of the areas studied in the survey. Although the scores from some individual Member States often reflect a degree of positivity or optimism, the overall decline is significant.

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<sup>15</sup> QA2.3 How would you judge the current situation in each of the following? The provision of pensions in (OUR COUNTRY), QA3.4 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 provision of pensions in (OUR COUNTRY), QA4.4 Compared with five years ago, would you say things have improved, gotten worse or stayed about the same when it comes to...? The provision of pensions in (OUR COUNTRY)

Figure 29: QA2.3, QA3.4 and QA3.4 - Score cards (index tables, showing evolutions)

COUNTRY RANKING: The provision of pensions in (OUR COUNTRY)

EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS				
		Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index		
		EB 73.5	EB 73.5 - EB 71.2	EB 73.5	EB 73.5 - EB 71.2	EB 73.5	EB 73.5 - EB 71.2		
	EU27	-1,2	-0,2	-42	37%	-9	-34	43%	-11
	LU	4,5	-0,1	-3	57%	-4	-20	43%	-13
	NL	3,7	-0,2	-45	35%	-1	-50	37%	-4
	DK	3,1	-0,1	-11	63%	-6	-24	63%	-15
	AT	2,5	-0,4	-27	50%	=	-18	56%	+5
	BE	1,1	-0,4	-20	57%	-16	-23	49%	-8
	FI	1	-0,1	-17	65%	+2	-17	72%	-1
	SE	0,8	+0,4	-24	48%	+9	-2	65%	+25
	MT	0,8	+0,3	+5	29%	+14	-3	46%	+3
	UK	0,6	+0,5	-29	36%	-1	-29	39%	-10
	DE	-0,1	+0,2	-52	36%	-3	-46	43%	-5
	CY	-0,4	+0,5	+8	36%	-22	-19	56%	-26
	SI	-0,8	-0,7	-54	35%	-6	-34	46%	+2
	FR	-0,8	-0,7	-57	33%	-11	-43	30%	-21
	IE	-1	+0,3	-38	27%	=	-31	45%	+2
	ES	-1,1	-0,6	-39	34%	-31	-38	40%	-36
	EE	-1,5	-0,9	+12	35%	-24	-8	58%	+18
	CZ	-1,8	=	-25	43%	-9	-41	46%	-15
	SK	-2	+0,4	-6	47%	+1	-19	52%	+7
	IT	-2,2	+0,1	-45	40%	-4	-20	46%	-4
	HU	-3,4	+0,2	-48	32%	+16	-7	54%	+50
	PL	-3,8	-0,4	-24	55%	+1	-14	64%	+3
	LT	-4	-2,6	-74	12%	-52	-48	36%	-16
	PT	-4	+0,3	-55	29%	-20	-45	38%	-27
	LV	-4,2	-1	-50	24%	-37	-38	43%	+1
	BG	-4,5	+0,2	-47	33%	-19	-14	47%	=
	EL	-6	-0,6	-83	11%	-28	-79	14%	-42
	RO	-6,1	-2,2	-69	14%	-48	-59	22%	-47

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

Nine Member States have a positive index for the evaluation of **current pension provision** in their country – Luxembourg is the highest-scoring Member State, with a score of 4.5 (-0.1 lower than in the last wave). Of these nine countries, only three reported an improvement since last year – these are Sweden (0.8, an increase of +0.4), Malta (0.8, an increase of +0.3) and the UK (0.6, an increase of +0.5).

The average score falls very sharply throughout the rest of the table, with Portugal (-4), Latvia (-4.2), Bulgaria (-4.5), Greece (-6) and Romania (-6.1) at the bottom of the list. Of these, Bulgaria and Portugal report an improvement from last year (by +0.2 and +0.3 respectively); Romania and Latvia both report significant falls (-2.2 and -1, the second and third steepest in the entire table after Lithuania's decrease of -2.6).

There are other significant decreases noted in Estonia (-0.9), France and Slovenia (-0.7), and Greece (-0.6). Despite small increases noted in some Member States, these sharp dips contribute to the overall high average EU27 decrease.

The situation now as compared to **five years ago** is perceived negatively by most Member States, with only Estonia (+12), Cyprus (+8) and Malta (+5) reporting positive scores. Extremely low scores are noted in Greece (-83), Lithuania (-74), and Romania (-69).






Significant improvements on last year's results are observed in Hungary (+16), Malta (+14) and Sweden (+9). Significant decreases came from Lithuania (-52), Romania (-48) and Latvia (-37).

Expectations for the **next twelve months** are still low, with negative scores across the entire table. The least pessimism is noted in Sweden (-2) and Malta (-3). The lowest scores came from Greece (-79) and Romania (-59). Hungary's score increased by +50; Sweden's score represents a +25 point increase on last year's. In Romania the score drops by -47 points and in Greece by -42.

No Member States report a positive outlook across all three sections – this is because the better/worse index scores for the twelve-month forecast are entirely negative. However, there are some Member States where improvement on last year has been noted in all instances, including Sweden, Malta and Slovakia. In Hungary, a significant increase is noted in all three indexes.

Figure 30: QA2.3, QA3.4 and QA3.4 - SD tables (index tables, showing evolutions)

SOCIO-DEMOGRAPHIC TABLE: The provision of pensions in (OUR COUNTRY)

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
			Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
	EB 73.5	EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
EU27	-1,2	-0,2	-42	37%	-9	-34	43%	-11
<b>Gender</b>								
 Male	-1	-0,1	-42	38%	-9	-34	43%	-11
 Female	-1,5	-0,4	-43	36%	-9	-34	43%	-11
<b>Age</b>								
 15-24	-0,9	-0,2	-29	33%	-12	-20	42%	-11
25-39	-1,7	-0,3	-42	35%	-10	-33	42%	-13
40-54	-1,5	-0,2	-50	35%	-10	-39	42%	-11
55 +	-0,9	-0,2	-44	42%	-8	-36	45%	-10
<b>Education (End of)</b>								
 15-	-1,7	-0,4	-46	39%	-12	-35	45%	-13
16-19	-1,5	-0,2	-46	36%	-12	-35	42%	-12
20+	-0,5	-0,1	-43	38%	-7	-38	41%	-11
Still studying	-0,6	-0,2	-23	35%	-5	-19	43%	-8
<b>Respondent occupation scale</b>								
 Self-employed	-1,7	+0,1	-48	36%	-13	-36	44%	-13
Managers	-0,2	+0,2	-43	36%	-5	-40	40%	-9
Other white collars	-1,4	-0,2	-48	35%	-13	-36	41%	-15
Manual workers	-1,7	-0,4	-45	36%	-10	-33	42%	-11
House persons	-2,1	-1,2	-46	36%	-12	-37	41%	-15
Unemployed	-2,5	-0,3	-47	31%	-16	-36	39%	-18
Retired	-0,7	=	-41	43%	-8	-35	46%	-8
Students	-0,6	-0,2	-23	35%	-5	-19	43%	-8
<b>Difficulties paying bills</b>								
Most of the time	-4,1	-0,7	-59	27%	-14	-43	37%	-17
From time to time	-2,4	-0,5	-50	32%	-14	-37	39%	-14
Almost never	-0,2	=	-37	41%	-7	-32	45%	-11

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

Women see the current situation as considerably worse than men, recording an average score of -1.5 compared to -1. Additionally, the age bands provide some interesting results, with a less negative view from the oldest and youngest age groups (-0.9) than the middle two. However, by both gender and age groups there is a decrease in satisfaction since last year's results across the board.



Respondents with difficulties in paying the bills 'most of the time' report the lowest average score of -4.1 (a decrease of -0.7 from last year), compared to those who 'almost never' have these problems (-0.2). In short, the situation is worst for those in financial difficulty and continues worsen.

House persons and the unemployed reported the lowest levels of satisfaction with the current situation (-2.1 and -2.5, with decreases of -1.2 and -0.3 respectively). The self-employed and managers are the only groups to report an improvement, however slight. Respondents in the middle two age bands (25-39 and 40-54) give the lowest scores (-1.7 and -1.5 respectively), while those who are collecting/are closest to collect their pensions (respondents aged 55+) and the youngest age group both recorded scores of -0.9. The retired have a score of -0.7, the same as last year.

In both the five-year comparison and the twelve-month forecast, the average answers from every group fell.

### **3.3 Unemployment benefits (QA2\_4; QA3\_5; QA4\_5<sup>16</sup>)**

The mood regarding unemployment benefits is, on the whole, pessimistic, with figures quite comparable to those for pensions. An EU index of -1.4 for the evaluation of the current situation represents a decrease of -0.2 index points on last year. The better/worse indexes for the five-year comparison (-37, a decrease of -7) and the twelve-month forecast (-32, down -11) are even lower than in the 2009 wave. It is worth comparing this set of results with the results for the general employment situation (section 2.2) which recorded an overall increase of +0.4.

When assessing the **current situation** of unemployment benefits in their country, Luxembourg tops the list with a comparatively high score of 3.8, followed by the Netherlands (3), Denmark (2.9), Austria (2.9) and Belgium (2). Ten Member States have a positive index but four of these are below 0.5. There is again another sharp drop towards the bottom of the table, where the lowest-scoring countries are Romania (-5.9), Greece (-5.8), Bulgaria (-5), Hungary (-4.3) and Lithuania (-4),

A few Member States reported improvements in the situation since last year, although these tended to be slight, except in Luxembourg where an increase of +1.4 was reported. The current situation was assessed as considerably worse in Romania (-1.6), Lithuania (-1.2) and Spain (-0.9).

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<sup>16</sup> QA2.4 How would you judge the current situation in each of the following? Unemployment benefits in (OUR COUNTRY), QA3.5 What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...? Unemployment benefits in (OUR COUNTRY), QA4.5 Compared with five years ago, would you say things have improved, gotten worse or stayed about the same when it comes to...? Unemployment benefits in (OUR COUNTRY)

Luxembourg was also the only Member State to report a positive better/worse index in the **five-year comparison**, with a score of 4, up +14 on last year. Although the rest of the scores ranged from quite neutral (-2 in Malta and Estonia) to very negative (-70 in Greece, -65 in Lithuania, -64 in Romania), there are some improvements on last year's score – in Malta (an increase of +13) and Luxembourg (an increase of +14) for example. Significant decreases are noted in Romania (-39), Lithuania (-36) Greece and Spain (both -22).

In the **twelve-month forecast**, Sweden (+10) is the only Member State to show a significant optimism. Greece (-71), Romania (-58) and the Netherlands (-57) reported the highest degree of pessimism. However, there are some Member States which – despite low scores – report improvements on last year's results, such as Hungary (-10, an increase of +40) and Estonia (-5, an increase of +38).

Figure 31: QA2.4, QA3.5 and QA3.5 - Score cards (index tables, showing evolutions)

COUNTRY RANKING: Unemployment benefits in (OUR COUNTRY)






	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
	EB 73.5	EB 73.5 - EB 71.2	Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
			EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
 EU27	-1,4	-0,2	-37	34%	-7	-32	42%	-11
 LU	3,8	+1,4	+4	44%	+14	-12	50%	+1
 NL	3	-0,5	-36	41%	-12	-57	32%	-22
 DK	2,9	+0,5	-22	53%	-8	-33	50%	-22
 AT	2,9	-0,2	-12	52%	+7	-4	58%	+16
 BE	2	+0,1	-14	58%	-6	-20	56%	-3
 FI	0,9	+0,4	-10	69%	+2	-12	76%	+7
 FR	0,4	-0,1	-39	29%	-7	-29	40%	-14
 DE	0,2	=	-43	34%	-4	-48	39%	-20
 IE	0,1	-0,2	-31	24%	-13	-43	38%	-2
 UK	0,1	=	-20	32%	-2	-31	33%	-15
 SI	-0,3	=	-38	36%	+8	-30	47%	+5
 SE	-0,5	=	-46	20%	+4	+10	57%	+29
 CY	-0,6	+0,3	-7	33%	-17	-21	50%	-17
 MT	-0,7	+0,3	-2	27%	+13	-4	43%	+4
 CZ	-2,1	-0,1	-41	35%	-1	-49	38%	-12
 ES	-2,5	-0,9	-46	29%	-22	-42	36%	-26
 SK	-2,9	+0,3	-23	38%	+5	-24	47%	+11
 PL	-3,1	+0,3	-14	52%	+4	-7	67%	+6
 IT	-3,1	+0,3	-37	37%	+1	-20	45%	-2
 LV	-3,3	+0,4	-43	23%	-7	-34	46%	+12
 EE	-3,4	-0,3	-2	25%	-1	-5	51%	+38
 PT	-3,8	-0,2	-56	24%	-18	-50	32%	-29
 LT	-4	-1,2	-65	12%	-36	-47	32%	-9
 HU	-4,3	-0,1	-49	33%	+5	-10	53%	+40
 BG	-5	=	-45	29%	-17	-15	46%	+2
 EL	-5,8	-0,5	-70	20%	-22	-71	18%	-37
 RO	-5,9	-1,6	-64	14%	-39	-58	23%	-47

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

Figure 32: QA2.4, QA3.5 and QA3.5 - SD tables (index tables, showing evolutions)

SOCIO-DEMOGRAPHIC TABLE: Unemployment benefits in (OUR COUNTRY)

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
			Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
	EB 73.5	EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
EU27	-1,4	-0,2	-37	34%	-7	-32	42%	-11
<b>Gender</b>								
 Male	-1,2	-0,3	-36	36%	-8	-33	42%	-10
 Female	-1,5	-0,1	-38	33%	-7	-32	41%	-12
<b>Age</b>								
 15-24	-1,2	-0,3	-30	31%	-10	-19	41%	-9
25-39	-1,4	-0,2	-36	35%	-9	-33	42%	-14
40-54	-1,5	-0,1	-40	36%	-4	-36	43%	-9
55 +	-1,3	-0,2	-37	34%	-7	-35	41%	-12
<b>Education (End of)</b>								
 15-	-2,1	-0,1	-41	31%	-7	-34	42%	-11
16-19	-1,7	-0,2	-39	34%	-7	-36	41%	-14
20+	-0,5	-0,3	-33	38%	-6	-32	43%	-10
Still studying	-0,5	-0,1	-25	32%	-7	-17	42%	-10
<b>Respondent occupation scale</b>								
 Self-employed	-1,5	-0,4	-36	35%	-9	-34	43%	-16
Managers	0,1	=	-29	38%	-2	-34	43%	-12
Other white collars	-1,1	+0,2	-37	37%	-6	-33	41%	-10
Manual workers	-1,6	-0,4	-41	34%	-8	-33	42%	-12
House persons	-2,2	-0,6	-45	31%	-14	-38	41%	-17
Unemployed	-2,9	+0,2	-48	29%	-10	-38	36%	-12
Retired	-1,4	-0,3	-35	35%	-5	-33	42%	-10
Students	-0,5	-0,1	-25	32%	-7	-17	42%	-10
<b>Difficulties paying bills</b>								
Most of the time	-4,1	-0,5	-56	27%	-12	-40	37%	-10
From time to time	-2,5	-0,5	-45	31%	-11	-36	39%	-13
Almost never	-0,3	=	-30	37%	-5	-30	43%	-11

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

Broken down by socio-demographic groups, the main differences concerning the current situation relate to the level of education, employment and financial status. Those who finished their education at 15 or under report a very low average response of -2.1, compared to -0.5 for those who studied until the age of 20 or after or are still studying.

The only demographic category to record a positive response are managers, with an average of 0.1 – this figure falls to -2.9 for the unemployed, who are of course the most affected by the level of unemployment benefits, and -2.2 for house persons. Those who have difficulties paying the bills 'most of the time' report a very low score of -4.1.

Despite the low scores, there is some improvement from the perspective of the unemployed – their score represents a +0.2 increase on last year. The same increase of +0.2 from the previous wave is registered for the other white collars. The scores for managers and for those who have 'almost never' difficulties in paying bills is the same as in the previous wave. Otherwise, the indexes for the other categories have all decreased since the previous wave of the survey.

The situation compared to five years ago is seen as negative across the board, and as getting significantly worse. In terms of evolutions, relatively large drops of -14 (for the house persons) and -10 (in the case of unemployed) are noted.

Optimism for the next twelve months is also low, with universally "worse" answers given against middling percentages of "same" responses, and again a decrease across all groups since last year's report.

### ***3.4 Relations between people from different cultural backgrounds (QA2\_6; QA3\_7; QA4\_7<sup>17</sup>)***

Overall, when questioned about the relations between people from different cultural and religious backgrounds or nationalities, the EU mood is slightly positive – the score of 0.3 represents no change from last year's report. However, it is generally considered that things have got worse in the last five years, with a better/worse index score of -21 and a "same" percentage of 48%. This is -1 lower than the same average answer in the last survey wave.





























When asked whether things would improve over the next twelve months, the score is also negative (-12), although this is compared with a high percentage (59%) of 'same' responses. This is also a -1 decrease against 2009 survey. Overall, the answers have remained stable since the previous wave. The relatively high levels of "same" percentages for the two better-worse indexes (situation compared with five years ago and expectations for the coming 12 months).

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<sup>17</sup> A2.6 How would you judge the current situation in each of the following? Relations in (OUR COUNTRY) between people from different cultural or religious backgrounds or nationalities, QA3.7 What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...? Relations in (OUR COUNTRY) between people from different cultural or religious backgrounds or nationalities, QA4.7 Compared with five years ago, would you say things have improved, gotten worse or stayed about the same when it comes to...? Relations in (OUR COUNTRY) between people from different cultural or religious backgrounds or nationalities

Figure 33: QA2.6, QA3.7 and QA3.7 - Score cards (index tables, showing evolutions)

COUNTRY RANKING: Relations in (OUR COUNTRY) between people from different cultural or religious backgrounds or nationalities

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
	EB 73.5	EB 73.5 - EB 71.2	Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
			EB 73.5		EB 73.5 - EB 71.2		EB 73.5	
 EU27	0,3	=	-21	48%	-1	-12	59%	-1
 LU	2,9	+0,4	-1	63%	=	-2	67%	+4
 EE	2	+0,6	+8	61%	+20	+14	73%	+12
 LV	1,9	+0,6	-6	71%	+5	+4	76%	+11
 ES	1,7	+0,9	-14	50%	-6	-13	58%	-9
 SK	1,6	+1,4	-19	53%	+5	-1	61%	+19
 UK	1,5	+0,1	-18	44%	+5	-16	57%	+1
 PL	1,4	+0,6	+5	62%	=	+5	73%	+2
 LT	1,4	=	-16	61%	-4	-4	70%	+2
 BG	1,4	+0,6	-11	65%	-3	+6	67%	+7
 IE	1,3	+0,3	-1	44%	+10	-5	64%	+9
 AT	1	+0,8	-21	50%	+23	-8	55%	+24
 DE	0,7	+0,1	-14	54%	+3	-16	65%	+1
 SI	0,5	+0,2	-38	49%	+3	-23	59%	+1
 PT	0,4	-0,2	-16	47%	-9	-16	58%	-12
 FI	0,3	-1,2	-22	48%	-21	-16	66%	-11
 CY	0,3	=	-13	48%	-16	-18	70%	-1
 MT	0,3	+0,5	-5	36%	+15	+6	56%	+10
 NL	0	-0,1	-49	32%	-8	-39	45%	-4
 CZ	-0,1	+0,9	-29	52%	+11	-22	63%	+11
 BE	-0,2	-0,6	-37	44%	-19	-27	51%	-14
 RO	-0,3	-1,6	-22	52%	-19	-13	57%	-18
 SE	-0,4	-0,3	-13	42%	+2	+5	59%	+17
 HU	-0,4	+0,3	-35	51%	+8	-2	63%	+27
 DK	-0,6	+0,1	-23	43%	+7	-10	62%	+2
 EL	-1	+0,7	-35	42%	-4	-38	46%	-14
 FR	-1,1	-0,5	-47	37%	-14	-21	54%	-18
 IT	-1,1	-0,3	-18	45%	+11	-3	52%	+9

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

Nine Member States record positive scores when evaluating **the current situation** of relations in their country between people from different religious or cultural backgrounds or nationalities, and it is difficult to draw any clear geographical conclusions.

Instead we can note that countries such as Luxembourg (highest-scoring with 2.9, a +0.4 increase on last year), Estonia (2, a +0.6 increase), Latvia (1.9, up +0.6), Spain (1.7, up +0.9) and Slovakia (1.6, the highest increase at +1.4) are the top-scoring Member States. Responses from Member States which stand much higher in the table, such as Belgium (-0.2, down -0.6), Sweden (-0.4, down -0.3) and Denmark (-0.6, an increase of +0.1) are notable. The lowest-scoring Member States are Greece (-1, up +0.7), France (-1.1, down -0.5) and Italy (-1.1, down -0.3).

Most Member States report a negative score on the better/worse index in **the five-year comparison** (but it should be remembered that there is a high percentage of "same" responses across the board). The only exceptions are Estonia (+8) and Poland (+5). The Netherlands (-49), France (-47) and Slovenia (-38) record the lowest scores.





The biggest changes for the better/worse index since last wave are in Austria (+23), Estonia (+20) and Malta (+15); the biggest drops occur in Belgium and Romania (both -19) and Cyprus (-16).

Six Member States report optimistic expectations for **the next year** – these are Estonia (+14), Bulgaria, Malta (both +6), Sweden (+5), Poland (+5) and Latvia (+4). Several are very negative about this, including the Netherlands (-39), Greece (-38) and Belgium (-27). Striking improvements are noted in Hungary (+27 from the last wave) and Austria (+24), compared to major decreases in France and Romania (both -18).

In many cases – for example, Estonia, Latvia, Slovakia, the UK, Ireland, Austria, Germany, Slovenia, Malta, the Czech Republic, Hungary and Denmark – an improvement has been observed on last year's data in all three sections of the question – the current situation, the five-year comparison and expectations for the coming twelve months.

Figure 34: QA2.6, QA3.7 and QA3.7 - SD tables (index tables, showing evolutions)

SOCIO-DEMOGRAPHIC TABLE: Relations in (OUR COUNTRY) between people from different cultural or religious backgrounds or nationalities

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
			Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
	EB 73.5	EB 73.5 - EB 71.2	EB 73.5	EB 73.5 - EB 71.2	EB 73.5	EB 73.5 - EB 71.2		
EU27	0,3	=	-21	48%	-1	-12	59%	-1
<b>Gender</b>								
 Male	0,4	=	-21	49%	-3	-13	59%	-2
Female	0,3	+0,1	-21	47%	=	-12	59%	=
<b>Age</b>								
 15-24	0,6	+0,1	-8	44%	-3	-2	58%	-4
25-39	0,4	+0,2	-19	47%	-2	-10	58%	-2
40-54	0,2	=	-25	48%	=	-15	60%	+2
55 +	0,3	=	-26	50%	-2	-16	58%	=
<b>Education (End of)</b>								
 15-	0,3	=	-25	50%	=	-17	58%	-3
16-19	0,2	-0,1	-24	48%	-1	-14	59%	-1
20+	0,4	+0,2	-22	48%	-3	-12	59%	=
Still studying	0,8	+0,3	-3	43%	-3	+2	58%	-3
<b>Respondent occupation scale</b>								
 Self-employed	0,4	=	-18	48%	-2	-13	58%	-4
Managers	0,5	-0,2	-20	48%	-7	-12	62%	-1
Other white collars	0,1	+0,1	-27	46%	-3	-17	58%	-5
Manual workers	0,3	=	-22	50%	+2	-11	59%	+3
House persons	0,2	=	-22	48%	-1	-18	57%	-2
Unemployed	0,4	+0,6	-21	47%	+4	-11	57%	+1
Retired	0,3	-0,1	-26	50%	-3	-17	59%	-3
Students	0,8	+0,3	-3	43%	-3	+2	58%	-3
<b>Difficulties paying bills</b>								
Most of the time	-0,8	-0,3	-30	44%	-2	-15	56%	-1
From time to time	0	=	-25	46%	-1	-16	55%	-3
Almost never	0,7	+0,1	-19	50%	-2	-11	61%	=

The current situation index is measured on a scale from -10 to +10.  
The better-worse indexes are measured on a scale from -100 to +100.

The socio-demographic breakdown reveals generally positive scores from all groups on the current evaluation index – with the exception of those with frequent financial difficulties (-0.8, a decrease of -0.3). Low positive scores for the current situation are consistent across the demographic groups, with no significant fluctuations. Only the unemployed record a significant change on last year's results, with a +0.6 increase.

There is a high percentage of "same" answers across all demographic groups for both the five-year comparison and the twelve-month forecast. The most positive (or least negative) responses came from students (who recorded a score of -3 on the five-year comparison and +2 for the twelve-month forecast) and the youngest respondents aged 15-24 years old (respectively -8; -2).



### 3.5 *The way inequalities and poverty are addressed (QA2\_7; QA3\_8; QA4\_8<sup>18</sup>)*

Turning now to the question of how inequalities and poverty are addressed, we can see a general negative picture. The EU27 index is -2.2 for the current situation, a decrease of -0.2 of an index point on last year's data. Both the five-year comparison (-32, a decrease of -5 points) and the twelve-month forecast (-20, a fall of -2 points) indicate that Europeans believe that matters are currently bad, worse than before, and set to get worse still. Compared to the other topics tackled in this section on social protection and inclusion, the current situation index for this item is by far the most negative.

Only two Member States – Luxembourg and Austria (both 0.4) – report positive indexes for **the current situation**. Austria's score represents an increase of +0.7 on last year's score, whereas Luxembourg's score has dropped by -0.5. Sweden, the Netherlands and Malta all report a score of -0.1. The lowest-scoring Member States are Hungary (-4.6), Greece (-4.8), Lithuania (-5.1), Latvia (-5.7) and Romania (-5.8).

Romania and Lithuania record the steepest decreases on last year's results (-2.1 and -1.1 respectively). The Bulgarian score of -4 is +0.6 better than in the last wave. The Slovakian score of -2.2 represented a +0.5 increase.

When asked to consider the situation compared to **five years ago**, every Member State apart from Malta (+4) reports a "worse" score on the better/worse index, although there is a high percentage of "same" answers across the board. These negative scores also have largely fallen since the last survey wave, although there are a few countries, such as Austria (-18 score, up +21 on last year), and Hungary (-52 score, up +15 on last year) which record increases.





























Optimism for **the year ahead** is low, although many Member States again report an improvement since last year. Only Sweden (+8), Hungary (+2), Estonia (+3) and Malta (+1) have positive scores here. Sweden's score of 8 is also +19 higher than last year. Hungary's score represents the biggest improvement, +56 points higher than in 2009. In terms of how these scores have changed since the last survey wave, there are large increases in Hungary (+56), Estonia (+30) and Austria (+20), and sharp drops in France (-18), Greece (-19) and Romania (-30).

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<sup>18</sup> A2.7 How would you judge the current situation in each of the following? The way inequalities and poverty are addressed in (OUR COUNTRY), QA3.8 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 way inequalities and poverty are addressed in (OUR COUNTRY), QA4.8 Compared with five years ago, would you say things have improved, gotten worse or stayed about the same when it comes to...? The way inequalities and poverty are addressed in (OUR COUNTRY)

Figure 35: QA2.7, QA3.8 and QA3.8 - Score cards (index tables, showing evolutions)

COUNTRY RANKING: The way inequalities and poverty are addressed in (OUR COUNTRY)






EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS				
		Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index		
		EB 73.5	EB 73.5 - EB 71.2	EB 73.5	EB 73.5 - EB 71.2	EB 73.5	EB 73.5 - EB 71.2		
	EU27	-2,2	-0,2	-32	44%	-5	-20	53%	-2
	LU	0,4	-0,5	-2	55%	+2	-5	55%	+5
	AT	0,4	+0,7	-18	53%	+21	-9	57%	+20
	SE	-0,1	-0,1	-22	43%	=	+8	66%	+19
	NL	-0,1	-0,4	-24	48%	-9	-35	46%	-16
	MT	-0,1	=	+4	39%	+7	+1	53%	-1
	UK	-0,4	-0,1	-18	48%	-2	-14	52%	+1
	DK	-0,6	-0,3	-30	50%	-4	-22	60%	-10
	FI	-0,8	-0,8	-25	55%	-10	-11	68%	+2
	ES	-1,1	+0,6	-28	46%	-15	-24	53%	-16
	CY	-1,3	-0,2	-26	45%	-18	-26	57%	-9
	BE	-1,5	-0,5	-28	51%	-9	-17	56%	-6
	CZ	-1,6	+0,4	-30	54%	+3	-26	62%	+3
	DE	-1,9	-0,3	-40	42%	-9	-35	50%	-5
	IE	-2,1	-0,2	-21	43%	+4	-14	59%	+9
	PL	-2,1	+0,3	-9	57%	+6	-6	69%	+7
	SK	-2,2	+0,5	-29	50%	+7	-12	55%	+18
	SI	-2,3	-0,1	-43	37%	+5	-27	52%	+4
	IT	-2,3	-0,2	-25	45%	+8	-5	51%	+7
	EE	-3,2	=	-11	52%	+12	+3	62%	+30
	PT	-3,4	=	-42	36%	-9	-30	48%	-14
	FR	-4	-0,2	-50	33%	-7	-27	50%	-18
	BG	-4	+0,6	-35	44%	-10	-2	56%	+13
	HU	-4,6	+0,4	-52	36%	+15	+2	50%	+56
	EL	-4,8	-0,1	-61	30%	-12	-54	34%	-19
	LT	-5,1	-1,1	-57	29%	-21	-30	52%	-6
	LV	-5,7	-0,5	-42	44%	-9	-14	60%	+6
	RO	-5,8	-2,1	-52	32%	-28	-40	40%	-30

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

Figure 36: QA2.7, QA3.8 and QA3.8 - SD tables (index tables, showing evolutions)

SOCIO-DEMOGRAPHIC TABLE: The way inequalities and poverty are addressed in (OUR COUNTRY)

	EVALUATION OF THE CURRENT SITUATION		SITUATION COMPARED WITH FIVE YEARS AGO			EXPECTATIONS FOR THE COMING 12 MONTHS		
	EB 73.5	EB 73.5 - EB 71.2	Better-worse index	% The same	Better-worse index	Better-worse index	% The same	Better-worse index
			EB 73.5		EB 73.5 - EB 71.2	EB 73.5		EB 73.5 - EB 71.2
EU27	-2,2	-0,2	-32	44%	-5	-20	53%	-2
<b>Gender</b>								
 Male	-2	-0,1	-31	46%	-4	-20	54%	-2
 Female	-2,3	-0,1	-33	43%	-5	-20	51%	-3
<b>Age</b>								
 15-24	-1,6	-0,5	-18	43%	-7	-6	56%	-4
25-39	-2,1	=	-30	45%	-4	-18	54%	-4
40-54	-2,5	-0,1	-38	44%	-4	-24	52%	-2
55 +	-2,2	-0,1	-36	44%	-4	-25	51%	-1
<b>Education (End of)</b>								
 15-	-2,3	+0,2	-36	44%	-3	-25	51%	-1
16-19	-2,3	-0,1	-36	43%	-6	-22	52%	-3
20+	-2,1	-0,4	-30	45%	-5	-21	52%	-5
Still studying	-1,4	-0,4	-15	43%	-8	-3	58%	-2
<b>Respondent occupation scale</b>								
 Self-employed	-1,8	-0,1	-32	45%	-7	-21	53%	-6
Managers	-1,6	-0,3	-30	46%	-9	-21	55%	-5
Other white collars	-2,2	-0,3	-34	44%	-4	-18	54%	-2
Manual workers	-2,3	+0,1	-34	44%	-1	-20	52%	-1
House persons	-2,4	-0,5	-33	43%	-4	-24	50%	-5
Unemployed	-2,9	+0,5	-36	41%	-3	-25	49%	-5
Retired	-2,3	-0,2	-36	44%	-5	-24	52%	-2
Students	-1,4	-0,4	-15	43%	-8	-3	58%	-2
<b>Difficulties paying bills</b>								
Most of the time	-4,3	-0,5	-45	36%	-3	-28	48%	-2
From time to time	-2,8	-0,2	-40	40%	-7	-25	50%	-6
Almost never	-1,5	=	-27	47%	-3	-17	54%	-1

The current situation index is measured on a scale from -10 to +10.

The better-worse indexes are measured on a scale from -100 to +100.

The overall lowest response (-4.3) for the current situation index comes from respondents with frequent financial difficulties, as they are probably the most affected by the way inequalities and poverty are addressed in their country. In comparison, the index for those who 'almost never' have such difficulties is -1.5. The least negative score (-1.4) comes from students.

Although there is a decrease for this item across most groups compared to last year's report, the unemployed, manual workers and the youngest age band record slight increases. However, all groups record a decrease in both the five-year comparison and the twelve-month forecast. Both these indexes demonstrate large differences between age groups, with the youngest respondents always being less negative than their older counterparts.

## CONCLUSIONS

Two topics analysed in this chapter recorded positive scores for the current situation at European level: health care provision (+1.3) and relations between people from different cultural backgrounds (+0.3). The other three topics recorded negative scores: provision of pensions (-1.2), unemployment benefits (-1.4) and the way inequalities and poverty are addressed (-2.2).

Comparing with the results of the first wave, all the indexes have decreased, except that of situation between people from different cultural backgrounds or nationalities, which remained the same. We can also note that on this latter index, countries often placed on the top of the table on the personal/general questions appear near the lower part of the scorecard: it is the case of the Netherlands (0), Sweden (-0.4), Denmark (-0.6), compared to a score of 0.3 at EU level.

When we compare the questions on the current situation of unemployment benefits and pensions to the question on the way in which poverty is addressed at the country level, we see once again a differentiation between respondents' assessment of their own position and the general situation in Member States. The general situation is far more negatively perceived than the personal situation.

When it comes to the situation compared to five years ago, Europeans believe that the current situation worsened for all dimensions analysed here. The respondents from only four countries consider that the health care provisions are better now than in the past: Belgium, Cyprus, Luxembourg and Malta, who recorded the biggest score (+36) and also the highest evolution since the previous wave (+27).

The near future doesn't seem very bright: Europeans from all 27 countries are dissatisfied with how situation of the provision of pensions and unemployment benefits will be in the next 12 months, the indexes in all the analysed countries being negative. However, the respondents from Hungary are far more optimistic about the future than they were one year ago; for this country, the evolutions of scores for the future from the last wave, which was conducted one year ago, are significantly high for all the topics of this chapter, for example for the index on the way and poverty are addressed (+56).

### THREE AGGREGATE MEASURES OF THE SOCIAL CLIMATE

Now we turn to the overall analysis of the **current situation**, broken down by Member State, for each of the individual sections analysed (personal situation, general situation, social protection and inclusion) and, finally, the overall score, for all dimensions analysed in the survey.

Across the Member States, there is a distinct difference between the three types of situation. Respondents' opinion of their personal situation is relatively good - a positive score of 2.5, with no change from the last wave of analysis. The picture related to the general situation (-2.7) with a negative index indicating that large proportions of Europeans judge the general situation in their country pessimistically. However, there has been a slight increase in the score for the current general situation, up by +0.3 index points compared to the last data wave. The score for social protection and inclusion is better, but remains negative (-0.7). We can observe a very slight decrease of -0.1 points in the social protection and inclusion index since the last year's survey.

The overall score is a negative -0.7, although this has not changed since the last wave of analysis.





























The results are ranked by overall score and show a certain degree of similarity between the Member States at the top of this index (overall score) and that which relates to the **personal situation**. Here, Sweden (6), Denmark (5.7) and Luxembourg (5.4) appear in the top five countries. In fact, Nordic and Benelux Member States return high scores quite consistently here.

The most dissatisfied Member States in terms of the personal situation are at the bottom of the "overall score" list Romania (-1.4), Bulgaria (-1.2) and Greece (-1). Ireland is notable in this index for its high score of 3.4, an increase of +0.5 points since last year's survey – but a low score in the general situation index, so that its overall aggregate score is relatively low in comparison to other Member States.

Of the top-scoring countries for the personal situation, Luxembourg and Austria are the only ones to report a significant positive evolution as compared to the last data round, with an increase of +0.4 and +0.5 points respectively. Significant increases are also recorded in Hungary (+0.8, despite a low score of -0.7 and a low overall total score), Slovakia (+0.8) and Ireland (+0.5). Things have got significantly worse in Romania (-2), Portugal (-0.8) and Greece (-0.7). In this last case, the score is certainly influenced by the severe budgetary crisis that hit Greece at the beginning of 2010.

Figure 37: Average index score for the current situation (ranked by overall score)

OVERALL COUNTRY RANKING OF THE CURRENT SITUATION

	PERSONAL SITUATION		GENERAL SITUATION		SOCIAL PROTECTION AND INCLUSION		OVERALL SCORE	
	EB 73.5	EB 73.5 - EB 71.2	EB 73.5	EB 73.5 - EB 71.2	EB 73.5	EB 73.5 - EB 71.2	EB 73.5	EB 73.5 - EB 71.2
 EU27	2,5	=	-2,7	+0,3	-0,7	-0,1	-0,7	=
 LU	5,4	+0,4	-0,1	+0,2	3,2	+0,2	2,5	+0,2
 DK	5,7	-0,2	0,8	-0,6	1,6	+0,1	2,4	-0,4
 NL	5	-0,4	0,4	-0,1	2,3	-0,4	2,4	-0,2
 SE	6	=	1,1	+0,9	0,7	+0,2	2,3	+0,5
 AT	3,8	+0,5	1	+1,2	2,3	=	2,3	+0,7
 FI	5,1	=	-0,7	+0,4	0,9	-0,4	1,4	=
 BE	4,2	-0,2	-1,8	+0,4	1,4	-0,3	0,8	-0,2
 DE	3,3	=	-0,5	+0,8	0	=	0,7	+0,4
 MT	2,6	-0,2	-3,1	+0,9	1	+0,2	0,2	+0,4
 UK	3,8	=	-2,7	+0,9	1	-0,1	0	=
 EE	2,3	+0,1	-0,5	+0,6	-1,1	+0,1	0	+0,4
 CZ	2,4	-0,1	-1,8	=	-0,7	+0,3	-0,1	+0,2
 FR	3,1	+0,1	-3,4	+0,1	-0,6	-0,3	-0,8	=
 CY	3,1	=	-3,4	-0,3	-0,4	+0,1	-0,8	-0,1
 SK	2,4	+0,8	-2,9	+0,5	-1,1	+0,7	-0,8	+0,8
 SI	2,4	=	-3,4	-0,8	-0,4	-0,1	-0,9	-0,4
 ES	2,1	+0,4	-3,3	+0,1	-0,1	+0,1	-0,9	+0,1
 IE	3,4	+0,5	-5	+0,2	-0,7	+0,2	-1,4	+0,4
 PL	2	=	-3,2	+0,1	-2,1	-0,1	-1,4	-0,1
 IT	1	-0,1	-3,7	+0,4	-1,9	-0,1	-1,8	+0,1
 LV	0,6	-0,1	-3,6	+0,1	-2,9	-0,3	-2,3	-0,1
 PT	0,1	-0,8	-4,9	=	-2,5	-0,1	-2,8	-0,5
 LT	0,3	-0,2	-5,3	-0,9	-2,7	-0,9	-3,1	-0,6
 BG	-1,2	+0,2	-3,6	+1,7	-3,2	+0,3	-3,1	+0,5
 HU	-0,7	+0,8	-5,3	+0,2	-3	+0,2	-3,4	+0,3
 EL	-1	-0,7	-6,3	-0,8	-4,3	-0,2	-4,3	-0,5
 RO	-1,4	-2	-6,4	-1,7	-4,5	-1,7	-4,5	-2,1

The current situation index is measured on a scale from -10 to +10.  
The better-worse indexes are measured on a scale from -100 to +100.

When we look at the **general situation**, the scores are low - although there has been some improvement at EU level, and in a great number of Member States, since the last survey wave. Low positive scores make up the top of the table, from Member States such as Sweden (1.1), Austria (1) and Denmark (0.8). The score plummets as we move down the list to the very lowest-scoring Member States: Romania with -6.4, Greece with -6.3, and Hungary and Lithuania with -5.3 each.

However, these low scores represent an improvement on last year's results in many cases, with a high proportion of Member States recording an increase. Significantly higher scores are recorded in Bulgaria (+1.7), Sweden, Malta and the UK (all +0.9). Sharp decreases are again seen in Romania (-1.7), Lithuania (-0.9) Slovenia and Greece (both -0.8).

Regarding **social protection and inclusion**, there is a very wide spectrum of answers. The highest-scoring Member States are Luxembourg (3.2), the Netherlands and Austria (both 2.3). Sweden's high scores in the previous sections are not reflected here (the average is 0.7). The lowest scoring Member States are Romania (-4.5), Greece (-4.3) and Bulgaria (-3.2). There is also some similarity between the top-scoring Member States in this index and those which top the overall aggregate score index. Levels of increase and decrease are also mixed here - significant increases came from Slovakia (+0.7), Bulgaria and the Czech Republic (both +0.3). The largest decreases are recorded in Romania (-1.7), Lithuania (-0.9) and the Netherlands (-0.4).

Regarding the **overall score**, we can see that overall, the top-scoring nations are Luxembourg (2.5), Denmark and the Netherlands (both 2.4). The remaining Nordic and Benelux Member States make up the top part of the table, alongside Austria. The lowest-scoring Member States are Romania (-4.5), Greece (-4.3) and - despite notable signs of overall improvement in certain aspects of life - Hungary (-3.4). Things have got better in Slovakia (+0.8), Austria (+0.7), Sweden and Bulgaria (+0.5 for both); they have got much worse in Romania (-2.1), and decreases are recorded in Lithuania (-0.6), Greece and Portugal (-0.5 for both).

There is a marked geographical pattern here: all countries that top the ranking are from the North or the West of the European Union. The first country that breaks this trend is Malta, coming in ninth position. At the other end of the scale, the pattern is also clear: the nine countries at the bottom are all from the South or the East of the EU. The results of Baltic States are worthy of mention, as they are quite different from one to another. Estonia is in 10th position, equal with the UK, while Latvia is in 21st position and Lithuania 23rd.

Overall, it should be noted that some countries are quite similar, in the sense that all three overall indexes regarding the current situation have increased: this is the case for Luxembourg, at the top of the scale for the overall index, Estonia, Slovakia, Spain and Ireland in the middle of the scale, and Bulgaria and Hungary at the bottom. In these countries, there has clearly been a general improvement since the last survey was conducted, just 8 months after the beginning of the crisis. Decreases in all three dimensions can be observed in the Netherlands, in Lithuania, in Greece and in Romania. In this last Member State, the drops are particularly striking (comprising the most important decreases for all three indexes), reflecting a severe deterioration of the economic situation.



## GENERAL CONCLUSIONS

The purpose of this survey was to offer an in-depth examination of the social climate in the EU. The objectives of the study were to explore the nature of the current key social concerns of European Union citizens, and to measure their evaluations of the past five years and their expectations for the coming twelve months. Since this is the second wave of analysis, we can also take a view of how opinions and expectations have evolved since the 2009 wave; and in so doing, we have sought to achieve a comprehensive, evidence-based analysis that can address topical queries regarding social conditions in today's European Union.

Three aspects of the current social climate are explored in this report: the personal situation, the general situation and social protection and inclusion.

In many respects, people see the situation as bad – but overall, not quite as bad as it has been at various points in the last few years. This is the overwhelming impression that we get from this year's Special Eurobarometer report. There is also a clear difference in many Member States, between the problems faced by countries as a whole and by individuals. However, there is some positivity overall in many Member States, even if they see the situation that the country as a whole faces as problematic.

There are several cases of general optimism and confidence – certain Member States and socio-demographic groups show a pattern of relative satisfaction, no matter what the question and the situation are. There are also several Member States and socio-demographic groups where the opposite is true and where pessimism and gloom prevail.

Geographically, a good deal of optimism and confidence can be seen in the Nordic Member States), the Benelux Member States and Austria. There is a great degree of pessimism and lack of confidence in the Member States with widely-reported economic problems such as Romania, Greece, Hungary and Bulgaria.

However, the situation is seen as improving in Bulgaria and Hungary, whereas all indexes have decreased in Greece and, to a greater extent, in Romania. Their views on all the dimensions analysed in this survey have worsened significantly since last year's survey, when they were already quite negative.

In terms of socio-demographic categories, students and the youngest respondents are far more optimistic than other categories, and in a significant number of instances the mood and levels of optimism improve in parallel with the length of time spent in education and decline with the age of respondents. On the other hand, those who experience frequent financial difficulties are, quite logically, far less happy or optimistic than those who do not. House persons and the unemployed tend to be more pessimistic than those in other occupational groups; the differences are generally far more pronounced in these groups than in gender and age groups. The same, those who have difficulties in paying their bills 'most of the time' are far more negative than those who are 'almost never' in this situation.

The personal situation of respondents is seen as much better than the general situation, which is influenced by external factors such as the media and opinions of peer groups/personal circles. It is also far easier for respondents to criticise the general situation ahead of their own personal situations – consideration of problems at the top level or in broad terms is common, and frequently fuelled by negative media coverage.

Interesting to note it's also that the aspects about social inclusion, such as healthcare, the provision of pensions and unemployment, concern Europeans more than the personal situation (general life situation, residential area, job situation and household financial situation) and less than the general situation of their country (economic situation, cost of living, affordability of energy etc).

In terms of evolution, the satisfaction about the aspects concerning the personal situation (analysed for the current situation, comparison with five years ago and expectations for the next twelve months) have decreased for all dimensions, except for the area of living, where the current situation is seen as it was one year ago. In comparison, the majority of the topics related to the general situation have recorded improved scores; Europeans being the most optimistic about the employment situation in the next 12 months. This indicates that respondents feel that the broader situation is getting better overall, even if their own experiences are worsening.

There is a worrying trend toward pessimism in the field of social policies, social cohesion and protection. Europeans are less confident in the provision of pensions, unemployment benefits and in the way inequalities and poverty are addressed in their countries than they were when the first wave was conducted; only the current situation of the relation between people from different backgrounds and cultures, and of the healthcare provision remained the same as in 2009.