

Exploratory study

MAJOR TRENDS IN EUROPEAN PUBLIC OPINION WITH REGARD TO THE EUROPEAN UNION Updated November 2015

This exploratory study was commissioned by the European Parliament and has been coordinated by the Directorate-General for Communication (Public Opinion Monitoring Unit).

This document does not represent the views of the European Parliament. The interpretations and opinions contained in it are solely those of the authors.

TNS opinion

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INTRODUCTION

Since 1973 and the birth of the Eurobarometer, the European Union has gone through various defining stages in its history and its institutional and political structure, affecting a wide range of issues: the strengthening of the institutions, the first direct elections to the European Parliament in 1979, successive enlargements, the signing of various European Treaties, the opening of borders between Member States, referendums and the introduction of the single currency. But the evolution of the European Union has also taken place during various periods of economic and political difficulty. It has seen the collapse of the Soviet bloc, international conflicts, several oil crises, periods of monetary instability, and, since 2008, a global financial and economic crisis which has resulted in aid plans being introduced for several Member States faced with very considerable economic difficulties. In 2015, the European Union has still to emerge from the crisis, even if the economy is showing encouraging signs of recovery.

The Standard Eurobarometer, a survey established in 1973 and conducted twice a year (in spring and autumn), and the special Eurobarometers have ever since enabled changes in European public opinion to be measured among an ever-increasing number of Europeans as the various enlargements have taken place (from nine Member States in 1979 to 28 in 2013). TNS opinion has carried out an exploratory study for the European Parliament's Public Opinion Monitoring Unit to analyse changes in European public opinion over time on a number of issues. The first version of this study was carried out in 2013, followed by an update in early 2015, which took into account the surveys conducted in 2013 and 2014. Following the Standard Eurobarometer survey of spring 2015 and the Special 'Parlemeter' Eurobarometer survey in September 2015, the analysis should be updated.

The following aspects were studied:

- **Changes in European public opinion with regard to the European Union and its institutions;**
- **Democracy in the European Union;**
- **The Economy of the European Union;**
- **The lives of Europeans;**

Several indicators will be analysed in each of these areas.

This analysis will attempt to take stock of European public opinion concerning these major themes.

Each part starts with a box highlighting the main findings based on changes in the indicators.

This analysis is based on several quantitative Eurobarometer surveys conducted face-to-face by the European Commission or European Parliament (Standard EB and Special EB)¹. It relates mainly to the Eurobarometer surveys conducted since autumn 1989 (EB32), even though in most cases the questions analysed have only been asked more recently, sometimes only in a limited number of waves. On certain questions, the analysis goes back to the first time the question was asked (EB0 in September 1973 in the case of the question on membership of the EU, or EB19 in spring 1983 in the case of the perceived benefits of membership of the European Union).

The analysis is based on the European average of the Member States which made up the European Union at the time the survey was conducted. This average is weighted to reflect the population of each of the Member States.

The reader should take into account the fact that in today's Europe of 28 Member States, the six most populous countries represent 70% of the EU average.

¹ In the case of a Standard EB (a survey conducted twice a year, in spring and autumn), the survey is designated by its number and by the period in which it was conducted. For example, we talk about EB78, autumn 2012 when referring to Standard Eurobarometer survey 78, conducted in autumn 2012. In the case of a Special Eurobarometer, the survey is designated by the exact name of the wave in which it was conducted, as well as by the month(s) in which the field work was carried out. So, for example, we talk about EB67.1, February 2007.

1. THE EUROPEAN UNION, ITS POLICIES AND INSTITUTIONS

- **Elections to the European Parliament** are also a time when indicators of support for the European Union improve: these indicators improved significantly after the 2004 vote, for example, but the improvement was less marked after those of 2009 and 2014.
- **The year 2005, which was marked by the debate over ratification of the Constitutional Treaty was an exception as far as major institutional moments are concerned**, because opinions tended to decline: public perception of EU membership and the image of the EU also went down. Trust in the EU, however, remained stable.
- **The impact of the single currency** on the main indicators of opinion regarding the European Union is also not unambiguous:
 - on the eve of the single currency being put into circulation in the first 11 countries of the eurozone, indicators tended to improve (trust in the EU or opinion about a country's membership).
 - In spring 2002, after the introduction of the euro, the EU's image improved and opinions on membership held firm, but trust in the EU fell.
- Overall in the period under analysis – since 1997 for trust in the EU and spring 2000 for the image of the EU – there has been a significant fall in these two key indicators of support for the European Union. Europeans blame it more for the economic weaknesses and associate it less with the founding principles, such as democracy and influence in the world. Trust in the institutions has also been strongly shaken by the economic crisis.
- However, for both indicators the latest measurements (autumn 2014 and September 2015) show an improvement.
- **Trust in the EU is higher than in national institutions (governments and parliaments)**, but the gap has tended to close since the onset of the crisis.
- However, despite the crisis Europeans continue to **associate the EU with positive themes**:
 - Benefits of membership at the highest level since 1983.
 - A feeling of both national and European citizenship is also at the highest level.

1. MEMBERSHIP OF THE EUROPEAN UNION AND THE BENEFITS IT BRINGS

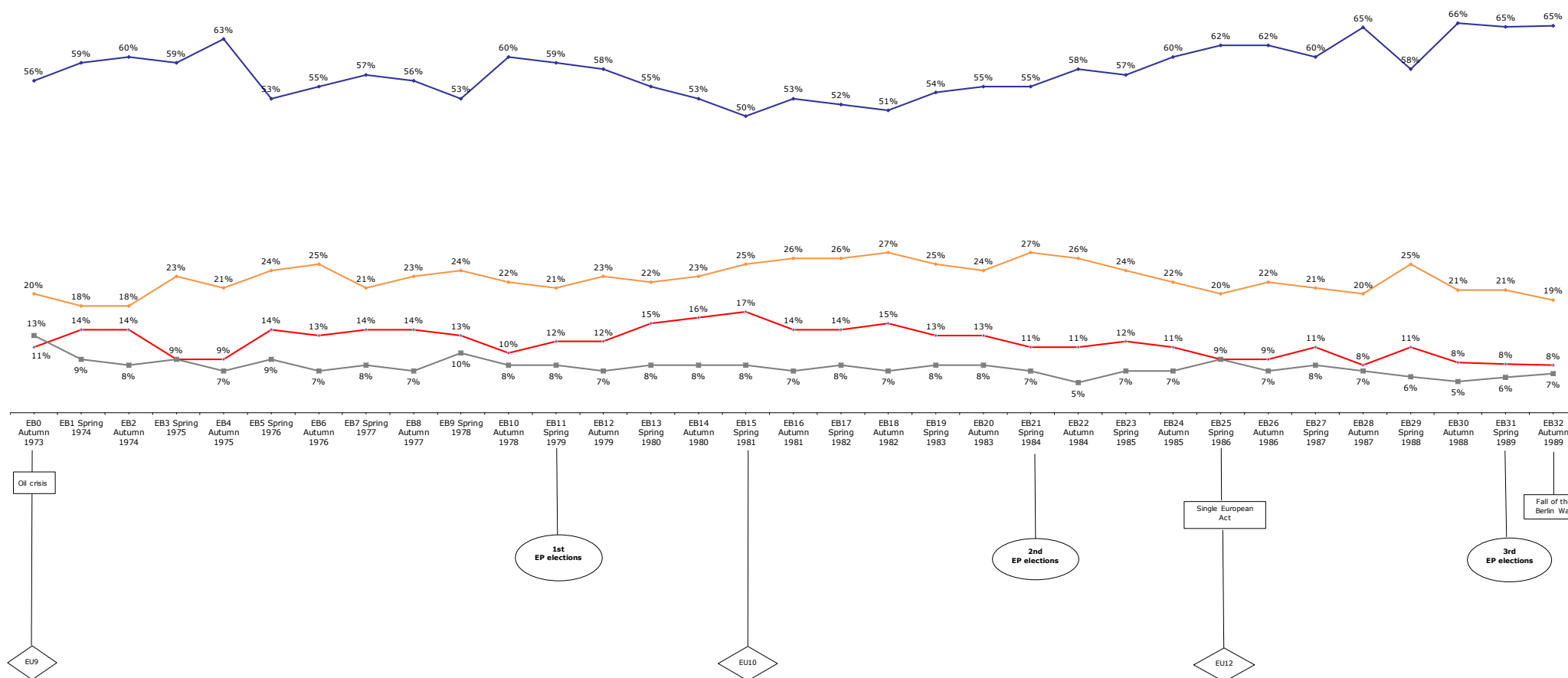
Membership of the European Union: above all, a good thing in the eyes of Europeans from 1973 to 2015

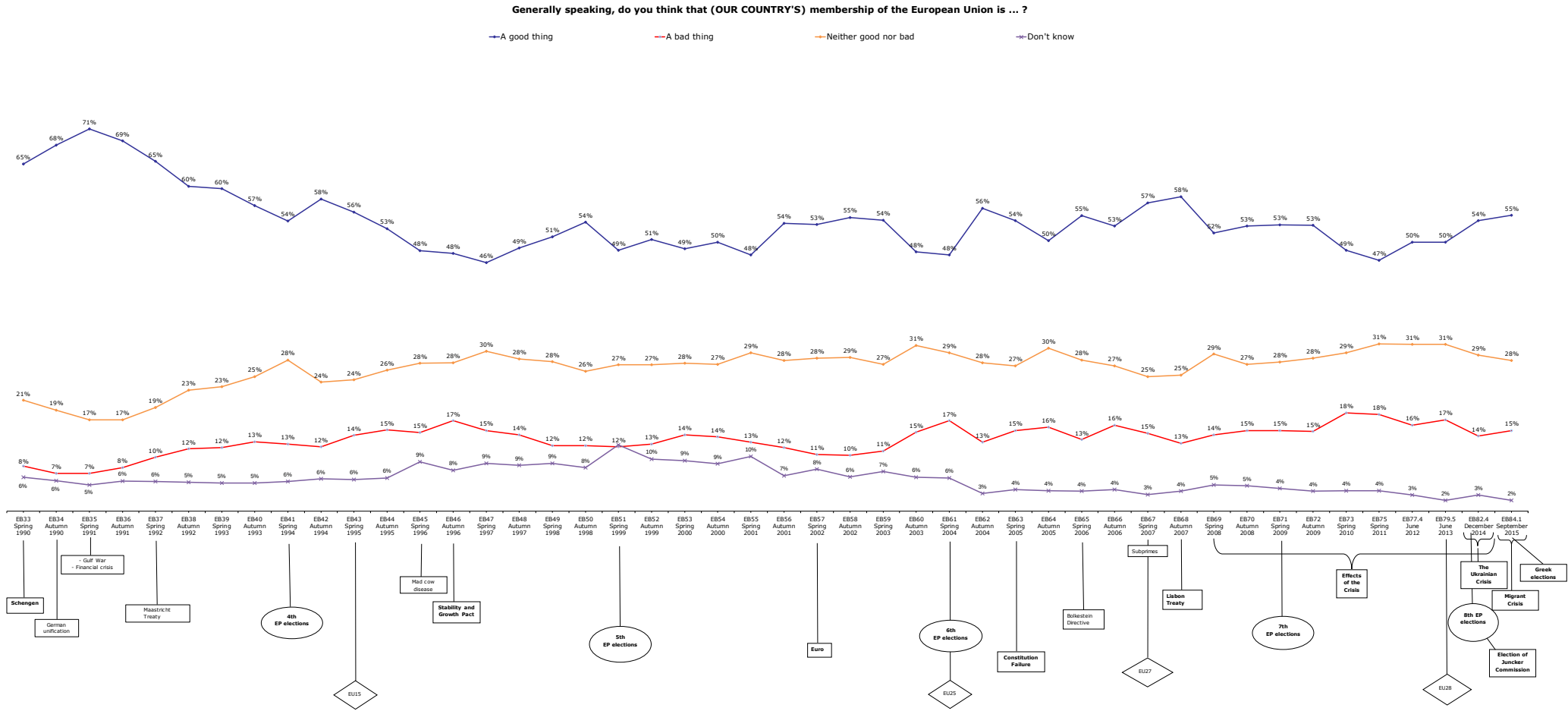
The opinions expressed by Europeans on their country's membership of the European Union² have remained largely positive throughout the whole of the period under review (1973–2015). Similarly, 'neutral' opinions, i.e. deeming one's country's membership of the Union to be 'neither a good thing nor a bad thing', have remained greater than negative opinions (i.e. classifying membership of the EU as a 'bad thing').

² In general, do you think that the fact that (OUR COUNTRY) is part of the European Union is...?

Generally speaking, do you think that (OUR COUNTRY'S) membership of the European Union is ... ?

— A good thing — A bad thing — Neither good nor bad — Don't know



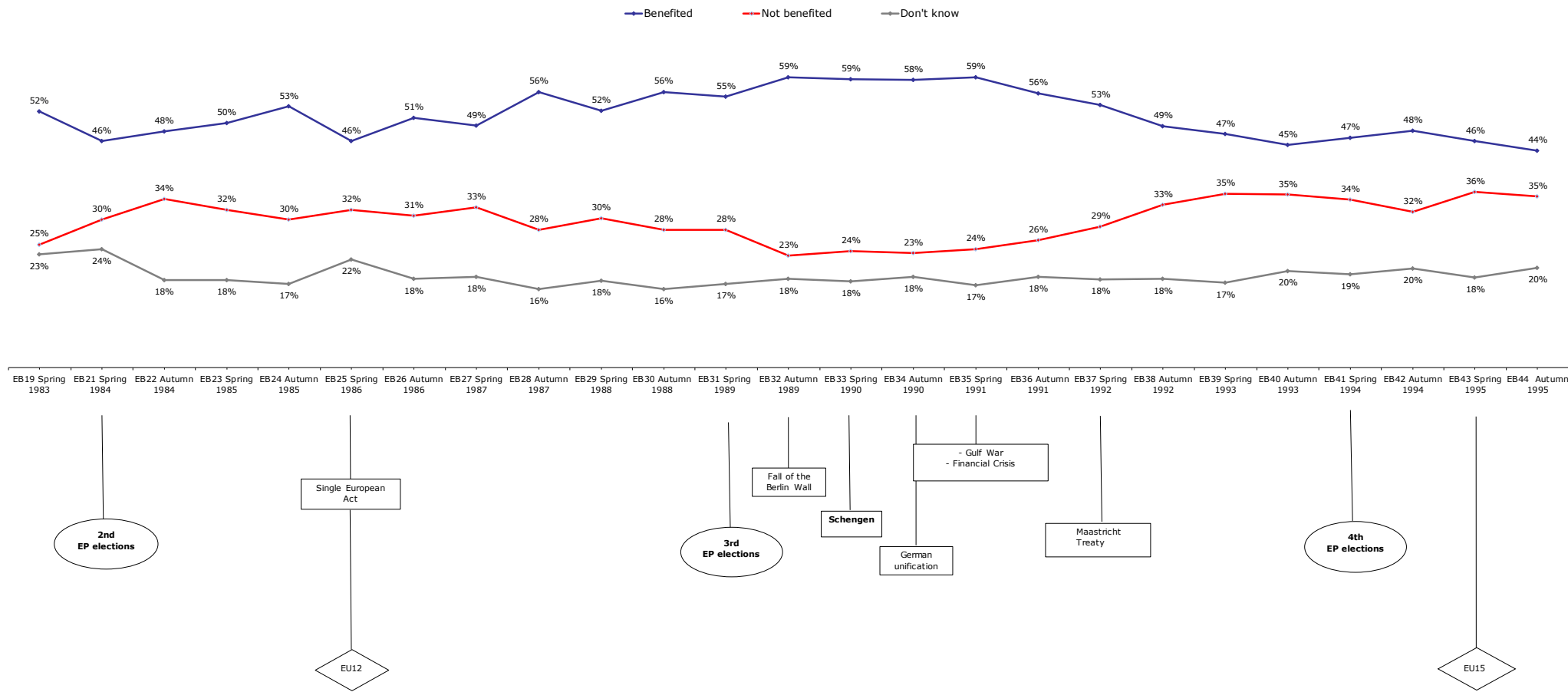


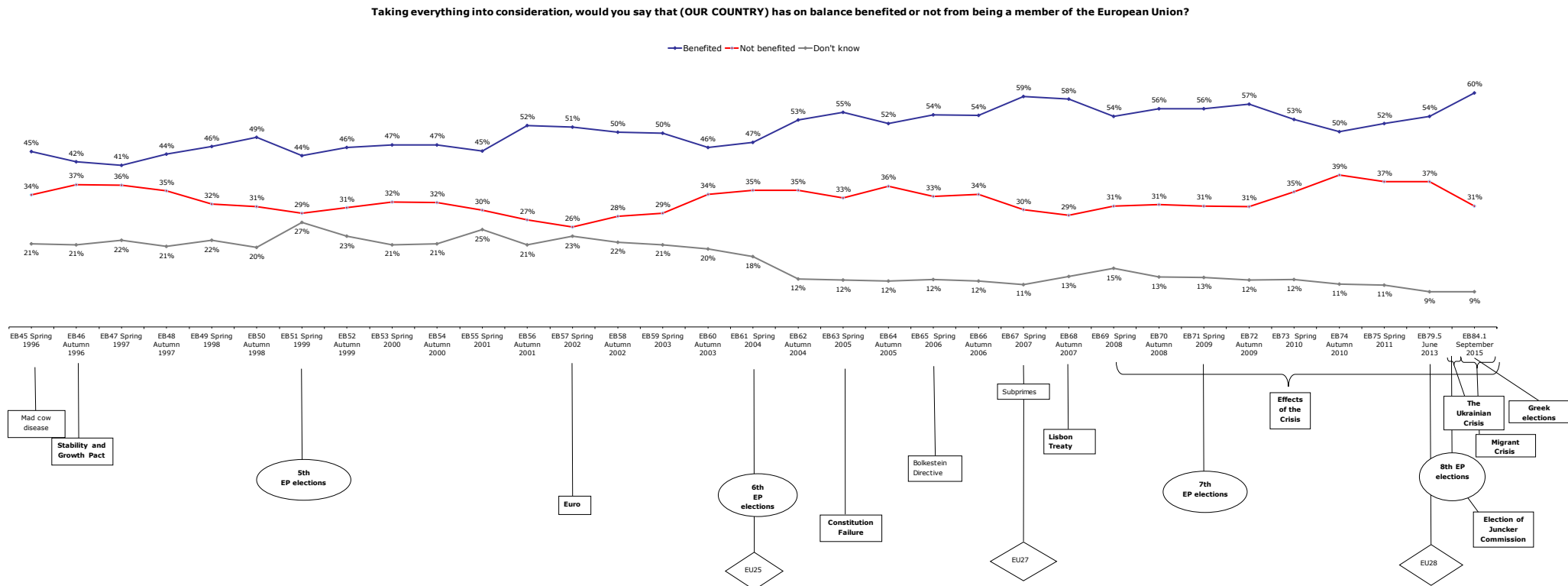
The benefits of membership of the European Union: always a majority over the period, with the highest level ever in 2015

The feeling that one's country has benefited from being a member of the European Union³ has remained a majority sentiment throughout the period under review, from spring 1983 to September 2015. In the September 2015 survey it reached as high as 60%, which is the highest level ever achieved since 1983. The response 'has not benefited' reached its highest ever level in survey EB74 in autumn 2010 (39%), whilst nevertheless remaining at a much lower level than that of the positive responses 'has benefited' (50%).

³ All things considered, do you think that (OUR COUNTRY) has or has not benefited from EU membership?

Taking everything into consideration, would you say that (OUR COUNTRY) has on balance benefited or not from being a member of the European Union?



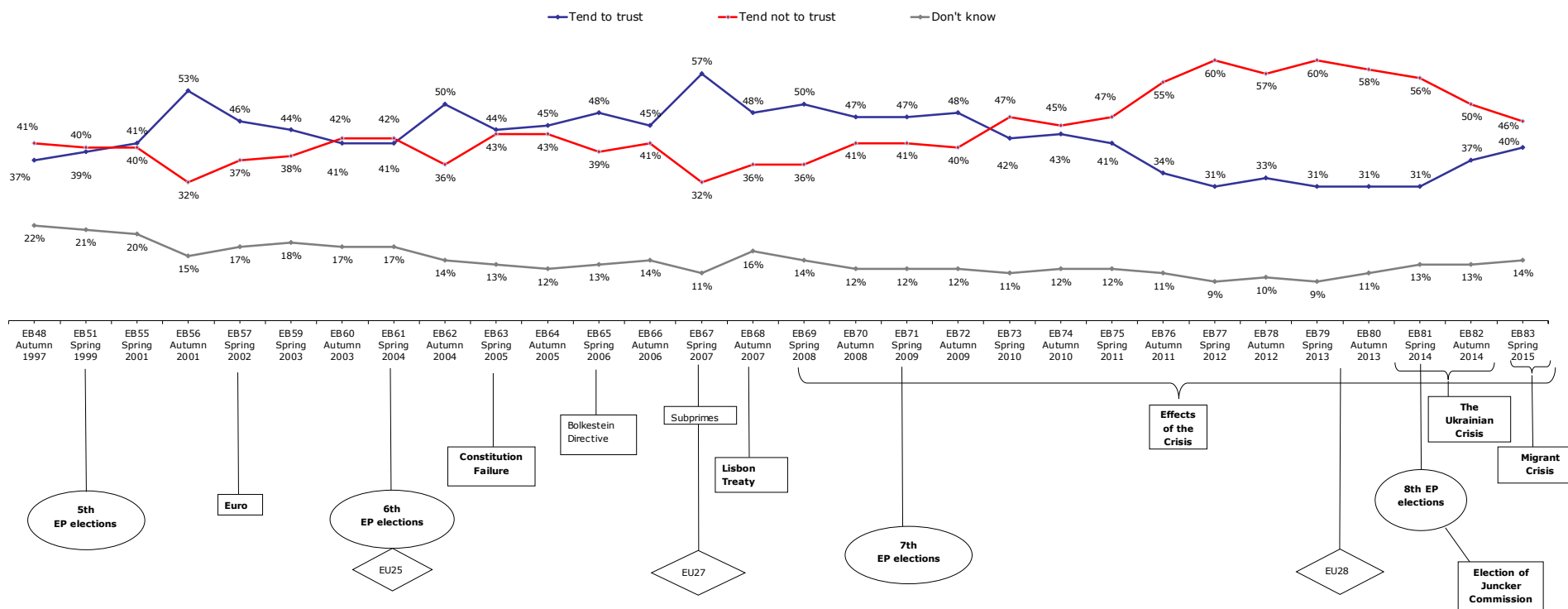


2. TRUST IN THE EUROPEAN UNION

Europeans' faith in the European Union was tested between autumn 1997 and spring 2015. After having been in the majority since autumn 2004 and the enlargement to 25 Member States, faith in the EU has gone back into the minority since EB73 in spring 2010. However, having stabilised at its lowest level in spring and autumn 2013, and in spring 2014 (EB81), it recovered slightly in the autumn 2014 survey (37% against 50% 'tend not to trust') and the spring 2015 survey (40% against 46%), while remaining in the minority.

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

- The European Union

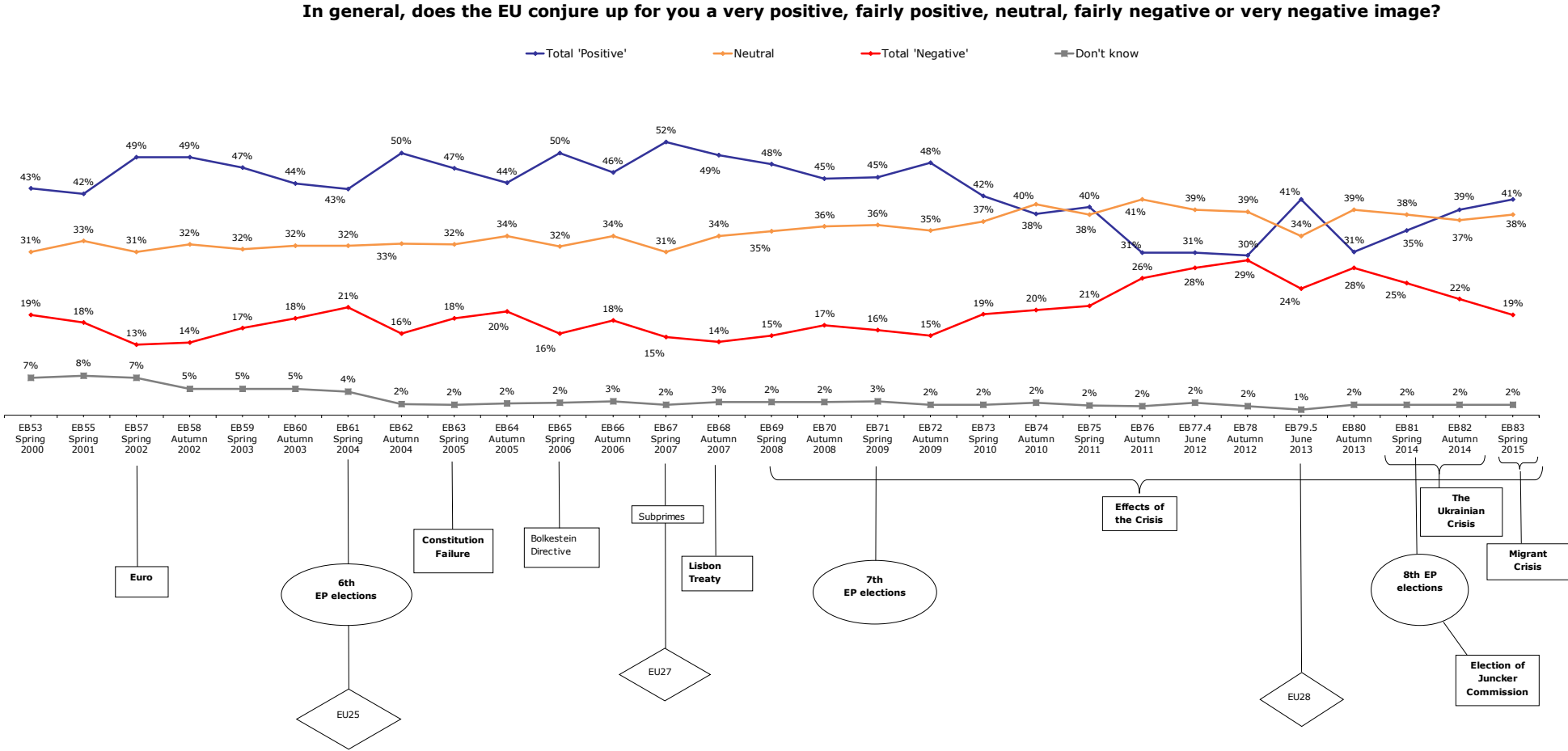


3. THE IMAGE OF THE EUROPEAN UNION AND WHAT IT MEANS TO EUROPEANS

The image of the European Union remains predominantly positive but has waned over time

The image of the European Union among Europeans⁴ has changed since spring 2000. Positive opinions remained clearly in the majority until autumn 2009 (EB72), before starting to decline in spring 2010 (EB73). Since autumn 2010 (EB74), they have remained below 42% and have been surpassed several times by neutral opinions (people saying that they have a 'neutral' image). However, the share of respondents declaring a positive image of the EU has progressed steadily since autumn 2013, increasing from 31% to 41% in spring 2015. Over the whole of the period under review, positive opinions have exceeded negative ones, and the neutral image has been increasing since 2000.

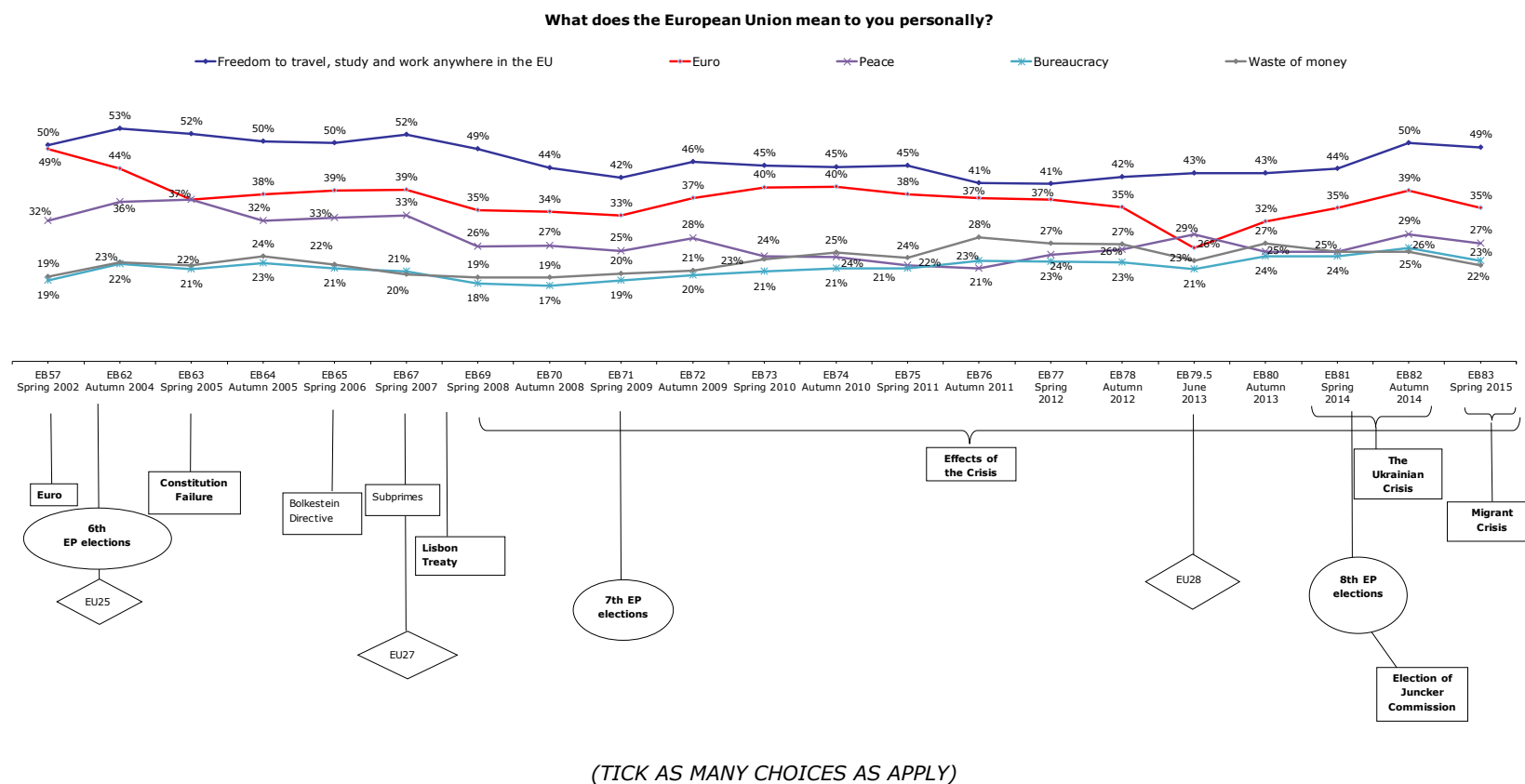
⁴ In general, is your image of the EU very positive, quite positive, neutral, quite negative or very negative?



What the European Union means: a trio of positive dimensions heads people's thinking

Throughout the survey period (from spring 2002 (EB57) to autumn 2014 (EB82)), **'freedom to travel, study and work anywhere in the EU'** was the principle which Europeans most commonly associated with the European Union. Next came **the euro**, with the exception of the survey conducted in June 2013 (EB79.5), when it was briefly overtaken by **peace**. **Peace** occupied third place in most of the surveys analysed. The concepts most frequently associated with the EU are therefore positive.

However, fourth and fifth positions are occupied by negative concepts: **bureaucracy** and **wasting money**. These have been gradually increasing since 2002.



4. TRUST IN THE EUROPEAN INSTITUTIONS

The European institutions have suffered a gradual erosion of trust, closely linked to the onset of the international economic crisis.

Europeans' faith in the European institutions fell significantly between autumn 2004 (EB62)⁵ and autumn 2015 (EB82). Whilst people generally trusted most of the institutions, this pattern started to reverse starting in autumn 2011 (EB76).

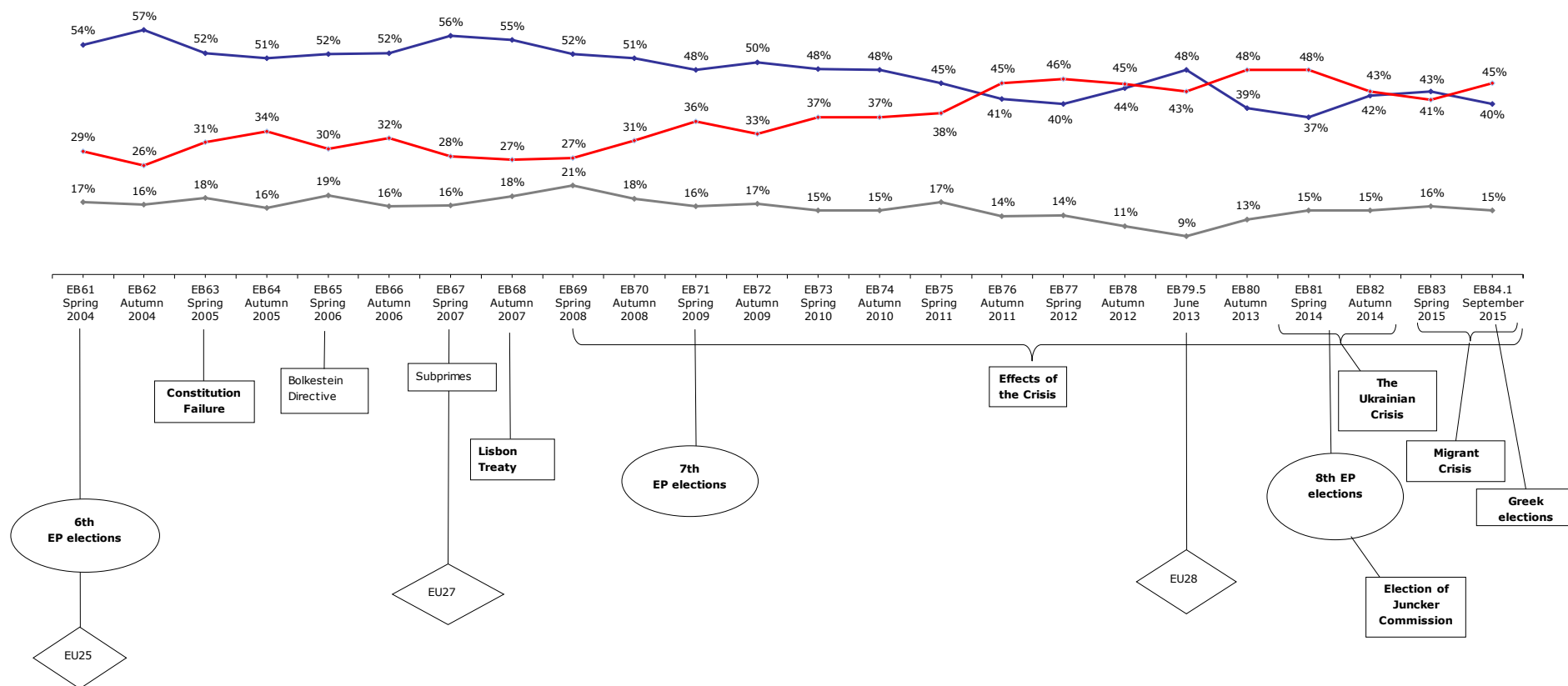
Broadly positive in autumn 2004 (57% in EB62 of autumn 2004), **there was a gradual reduction in the level of faith in the European Parliament until it fell behind** starting in autumn 2011 (in EB76, 41% trusted the EP as opposed to 45% who did not). It should be noted that the round of surveys conducted in autumn 2011 showed up a sharp decline in all the indicators. Trust in the EP briefly held the upper hand in the June 2013 (48% as against 43%) and spring 2015 (43% as against 41%) surveys. In the most recent survey (September 2015), 'trust' is again below 'no trust' (40% as against 45%).

⁵ For each of the following European institutions, please state if you trust them or not.

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

- The European Parliament -

— Tend to trust — Tend not to trust — Don't know

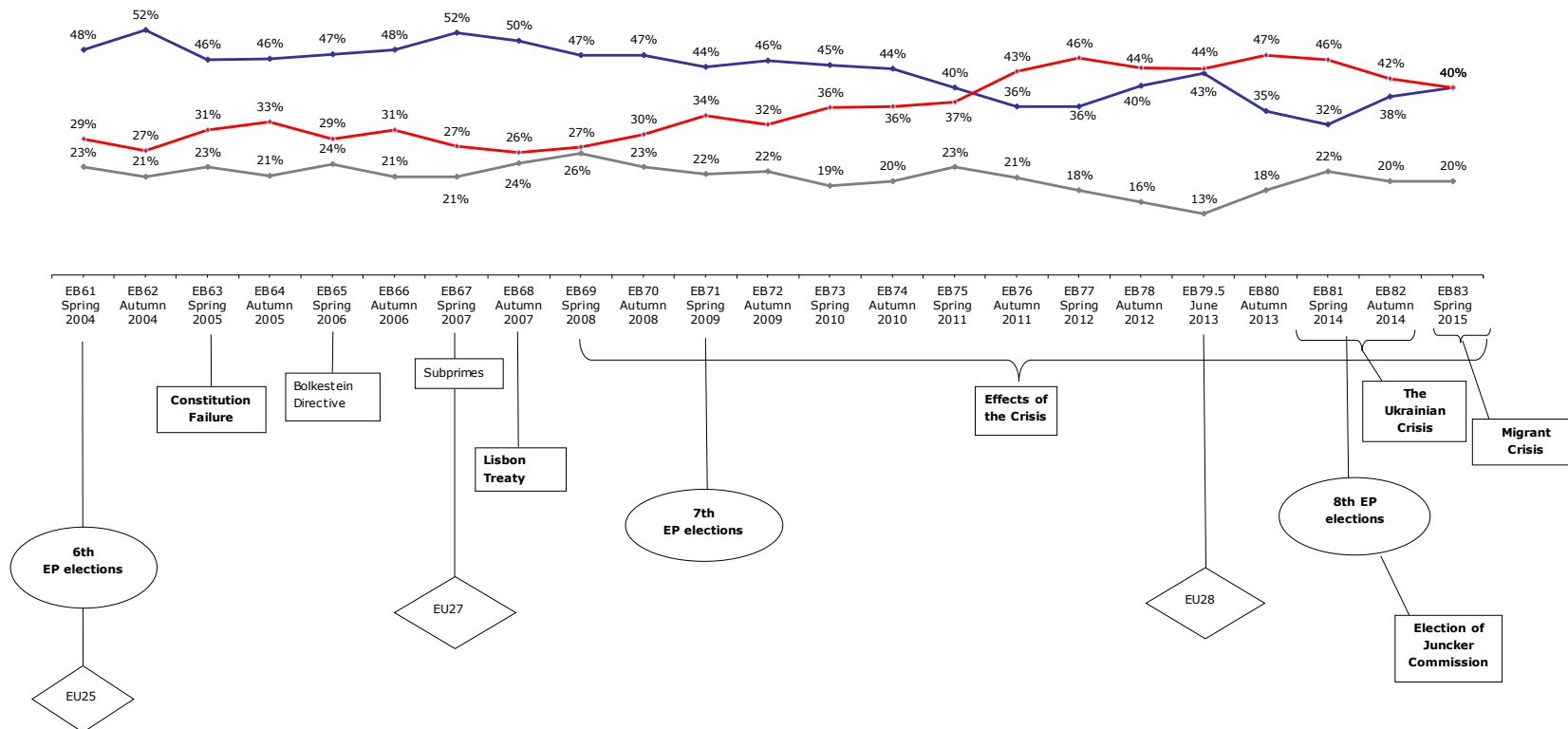


There was a similar trend for **faith in the European Commission**. The level of trust in this institution steadily fell until it lagged behind starting in autumn 2011 (43% for 'no trust' in EB76, with 36% for 'trust'). After that, mistrust was dominant until the spring 2014 survey (38% as against 42%). The last spring 2015 survey (EB83) showed trust and mistrust as being equal (40% for each).

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

- The European Commission -

— Tend to trust — Tend not to trust — Don't know

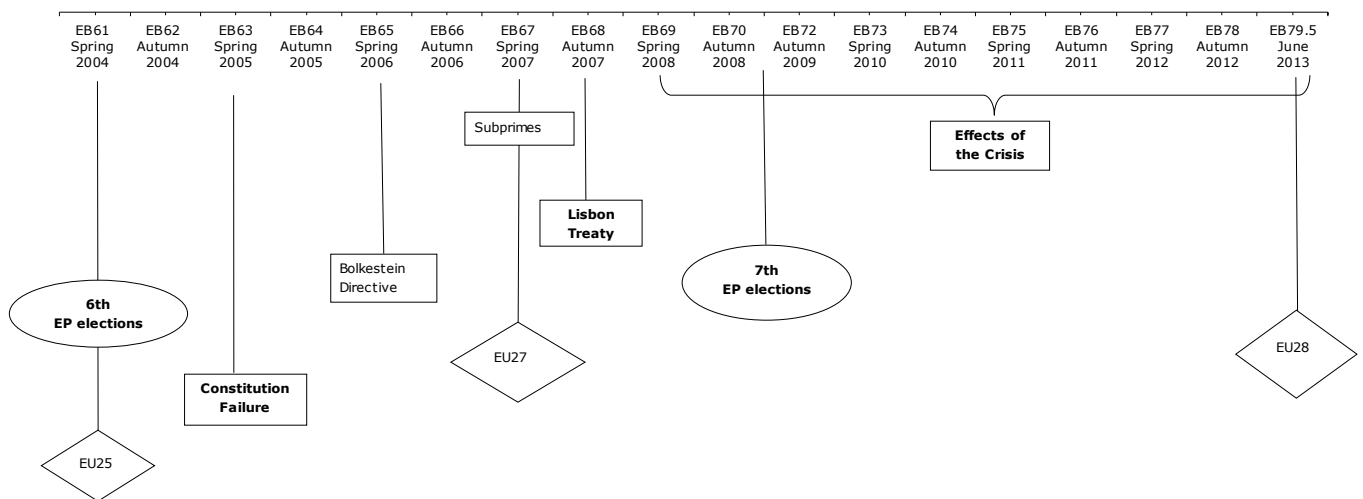
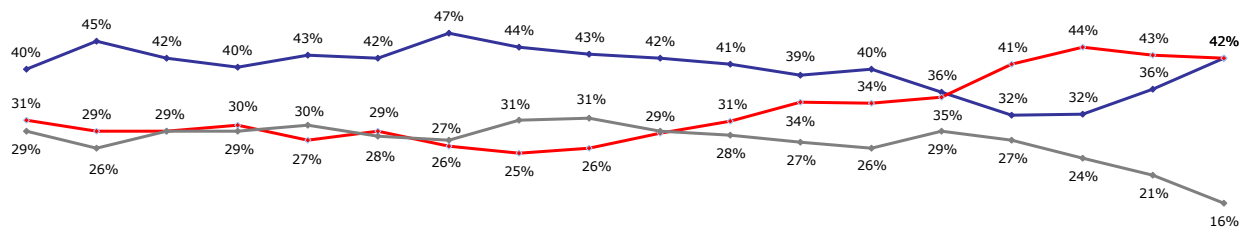


Faith in the Council of the European Union also diminished and became the lesser-held view starting in autumn 2011 (EB76). However, people's faith showed an upturn after autumn 2012, reaching 42% the last time this was recorded, in June 2013 (the same figure as for mistrust). The proportion of no replies is high but has been steadily falling since autumn 2011 (16% in EB79.5, June 2013).

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

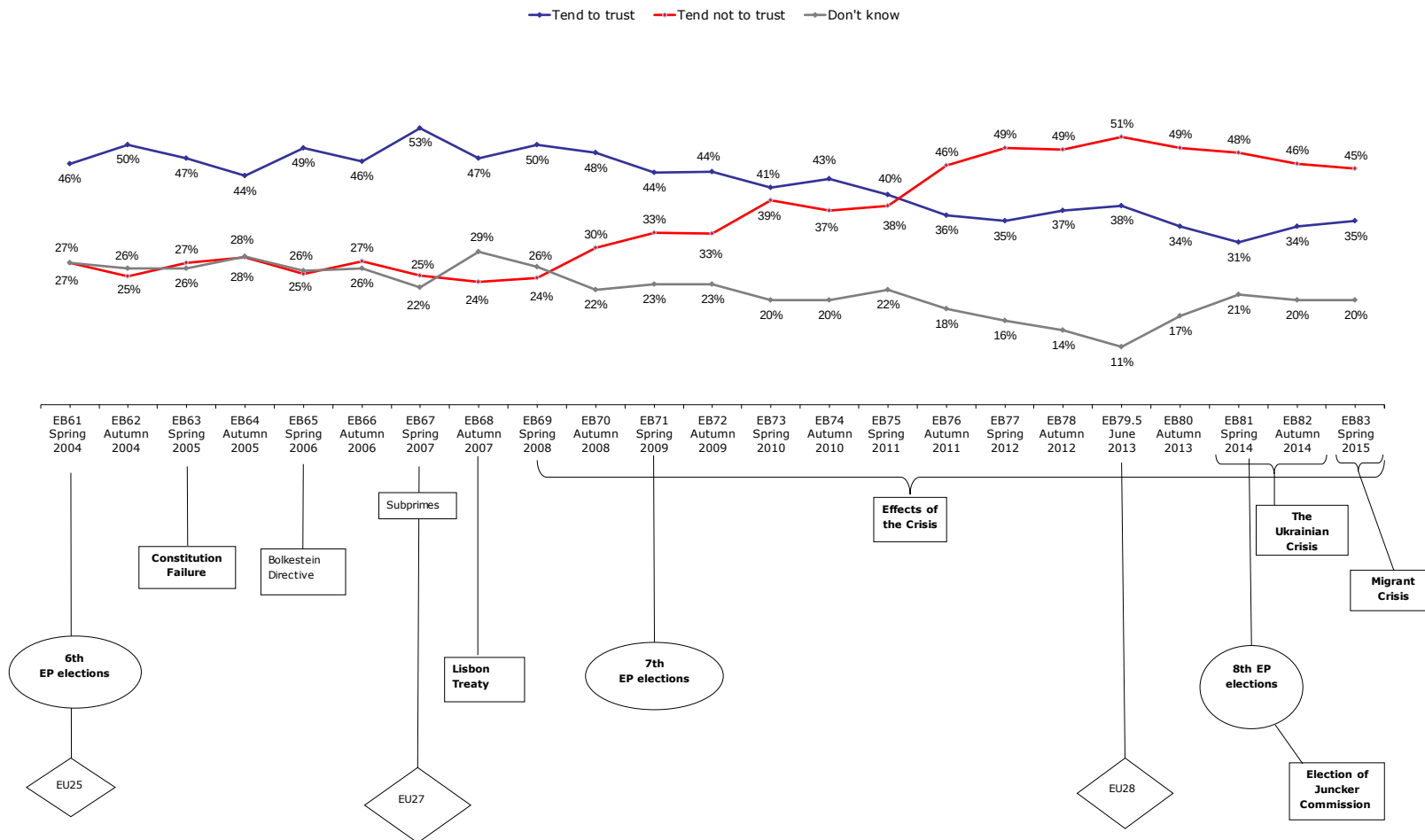
- The Council of the European Union -

— Tend to trust — Tend not to trust — Don't know



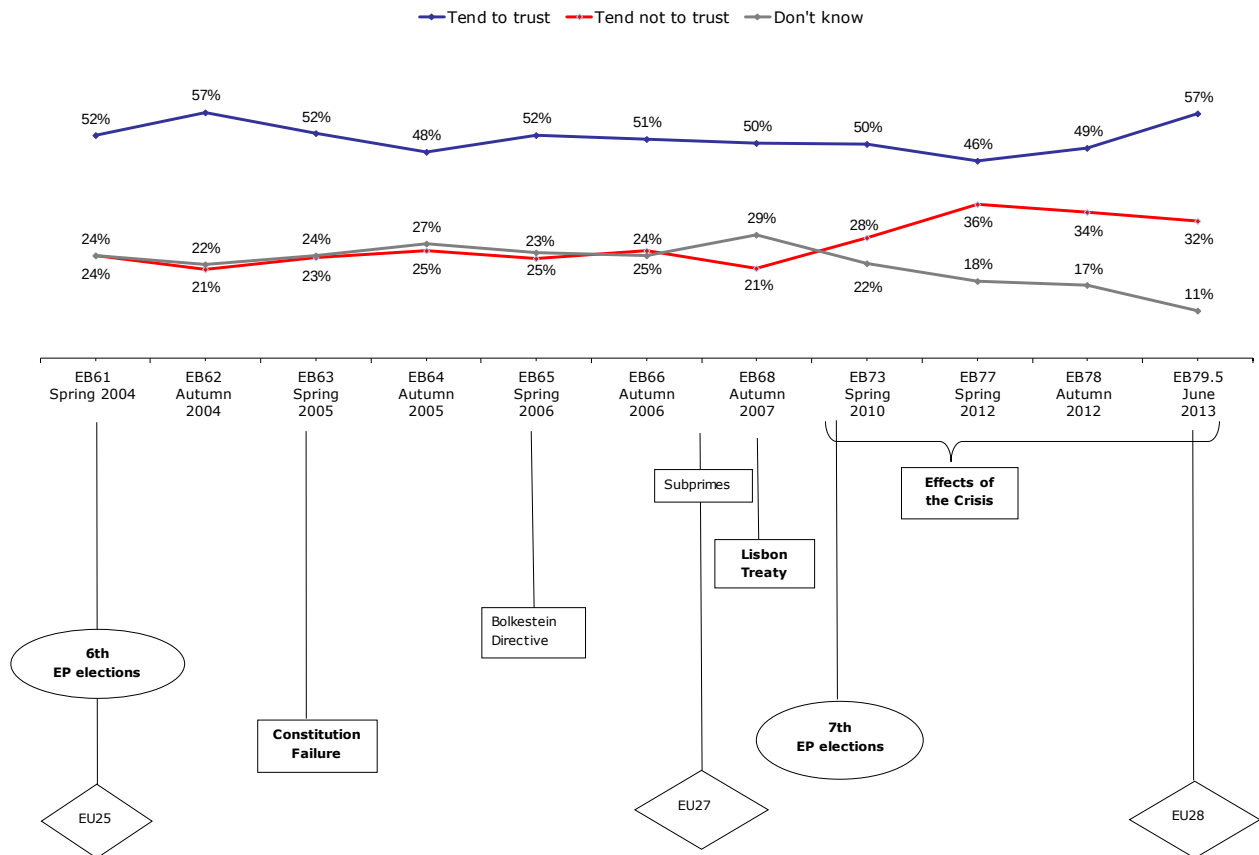
Faith in the European Central Bank has followed the same pattern. This is the institution with the highest level of mistrust, although this has been in steady decline since autumn 2013 (EB80).

For each of the following European bodies, please tell me if you tend to trust it or tend not to trust it.
- The European Central Bank -



The Court of Justice of the European Union stands out from the other institutions: 'trust' has remained comfortably ahead throughout the period in question (from autumn 2004 (EB62) to June 2013 (EB79.5)). However, mistrust made great strides starting in spring 2010 (EB73), reaching 36% in spring 2012 (EB77). It has since fallen back slightly but is over 30%.

For each of the following European bodies, please tell me if you tend to trust it or tend not to trust it.
- The Court of Justice of the European Union-



5. KNOWLEDGE OF HOW THE EUROPEAN INSTITUTIONS WORK

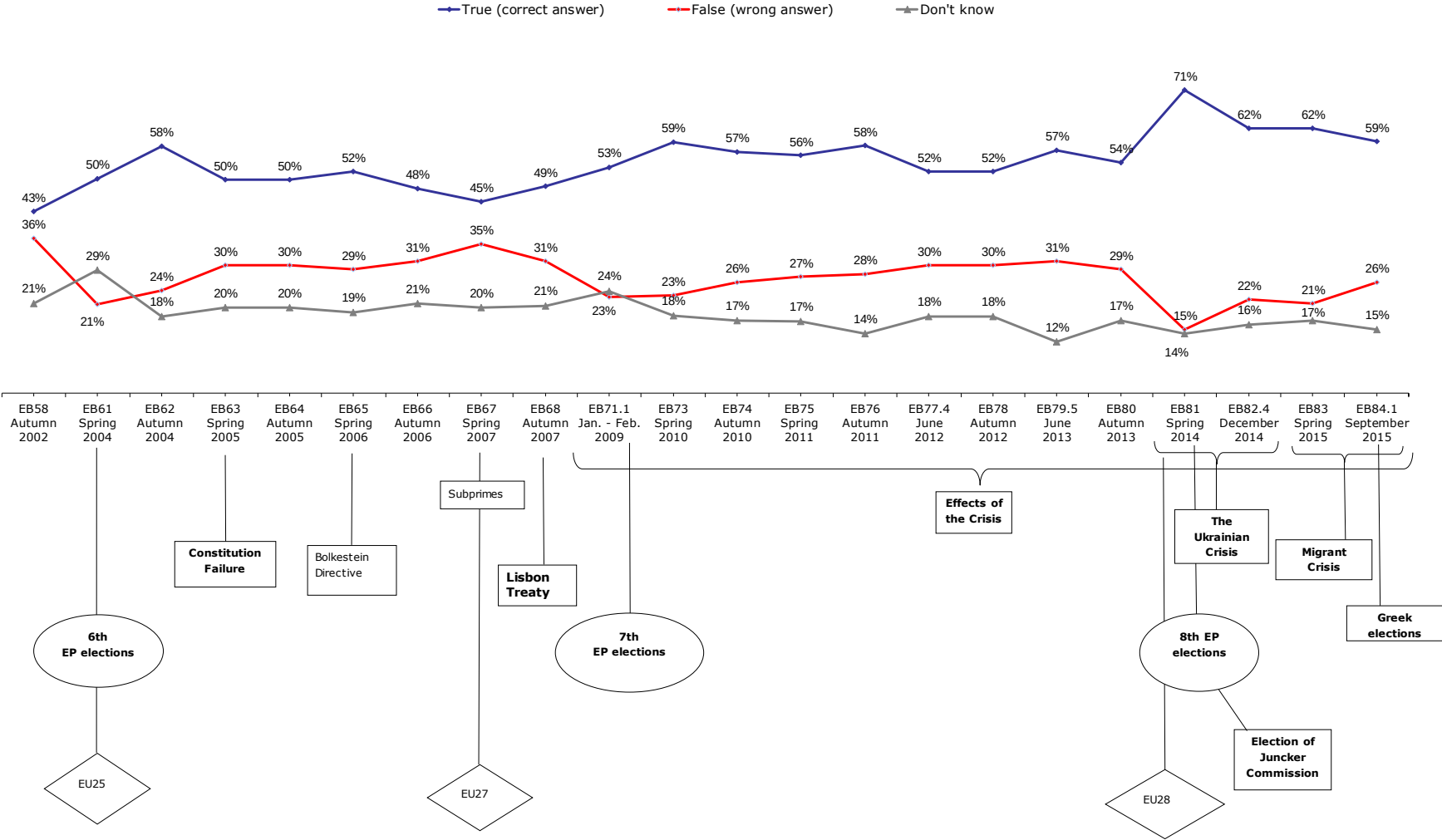
A majority of Europeans seem to know about some of the main workings of the EU.

When asked a 'true/false' quiz question⁶ on their knowledge of how the European institutions work, **Europeans showed that they are quite well informed, with most choosing the correct answer to the questions posed.**

Knowledge of the principle of the election of Members of the European Parliament by direct universal suffrage in every Member State has been dominant since autumn 2002 (EB58). It has shown an increase at every European election. The rise was particularly marked before the most recent elections, in May 2014 (71%, an increase of 17 percentage points), after which there was a fall to 59% at the time of the last survey, in September 2015.

⁶ For each of the following statements about the EU, please state if you think they are true or false.

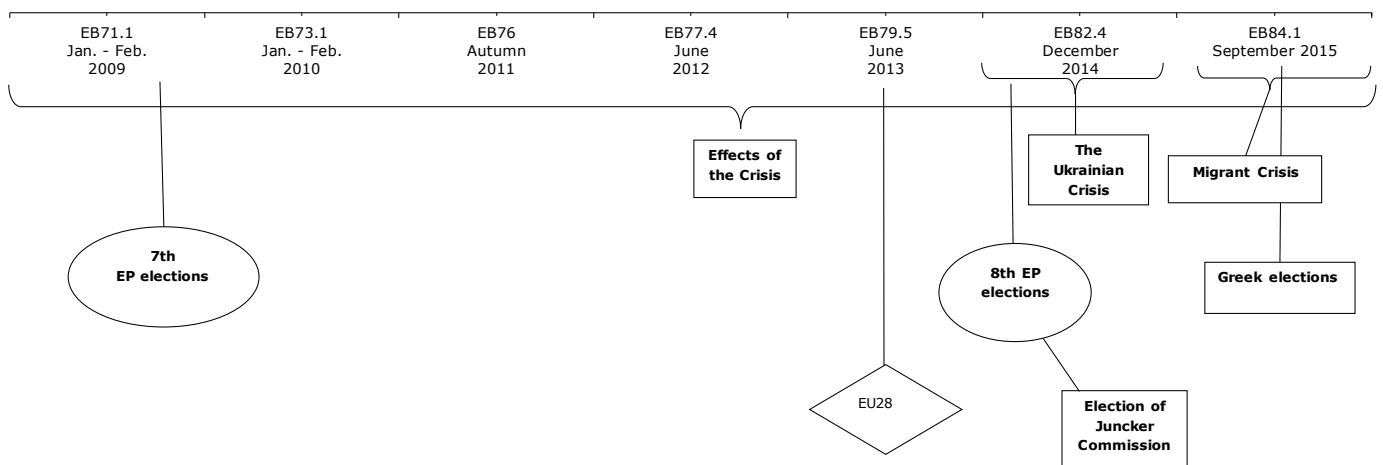
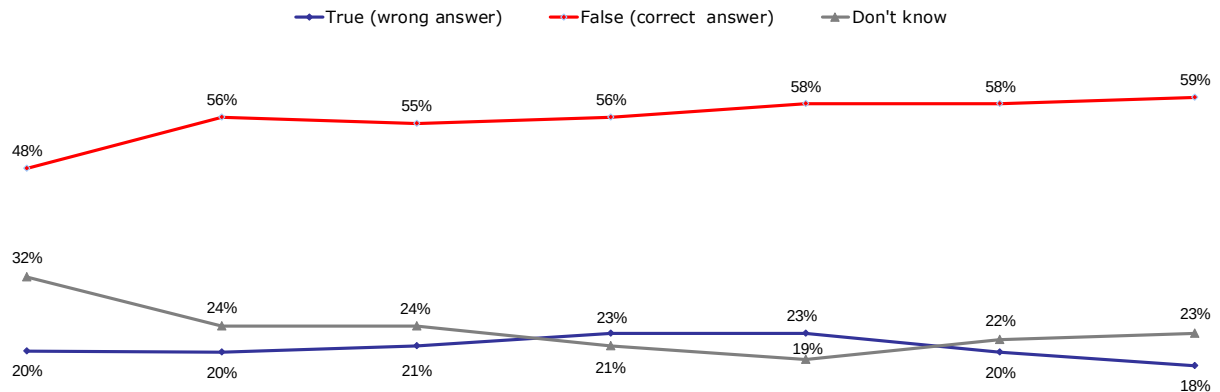
For each of the following statements about the EU could you please tell me whether you think it is true or false.
- The members of the European Parliament are directly elected by the citizens of each Member State-



The majority of Europeans know that the Member States do not all have the same number of MEPs. After rising between January-February 2009 (EB71.1) and January-February 2010 (EB73.1) (an increase of 8 points, from 48% to 56%), Europeans' level of knowledge about the number of MEPs from each Member State has continued to rise steadily.

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

- Each Member State has the same number of Members of the European Parliament -

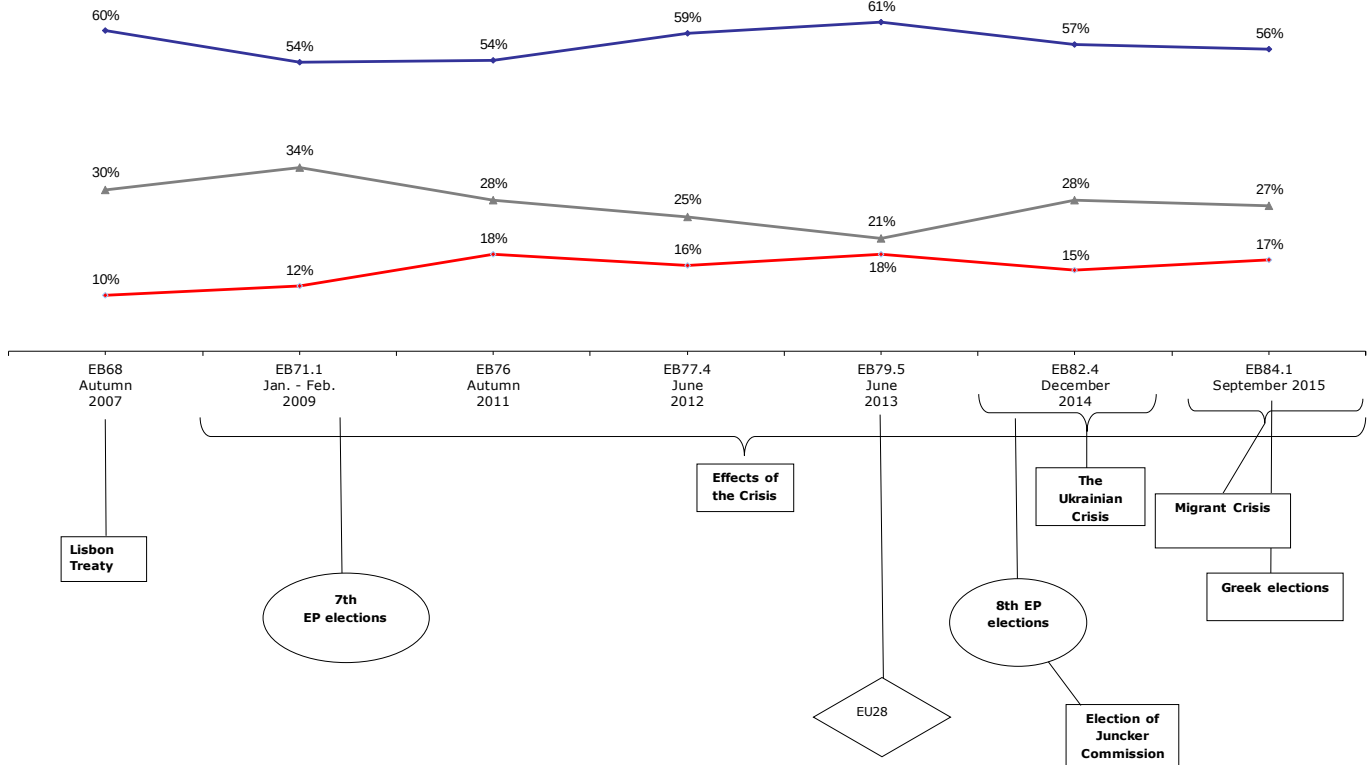


In terms of the principle of joint agreement between the European Parliament and the Member States regarding determining the budget of the EU, here again there is a prevalence of correct responses throughout the period in which the question was asked, although there was no increase.

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

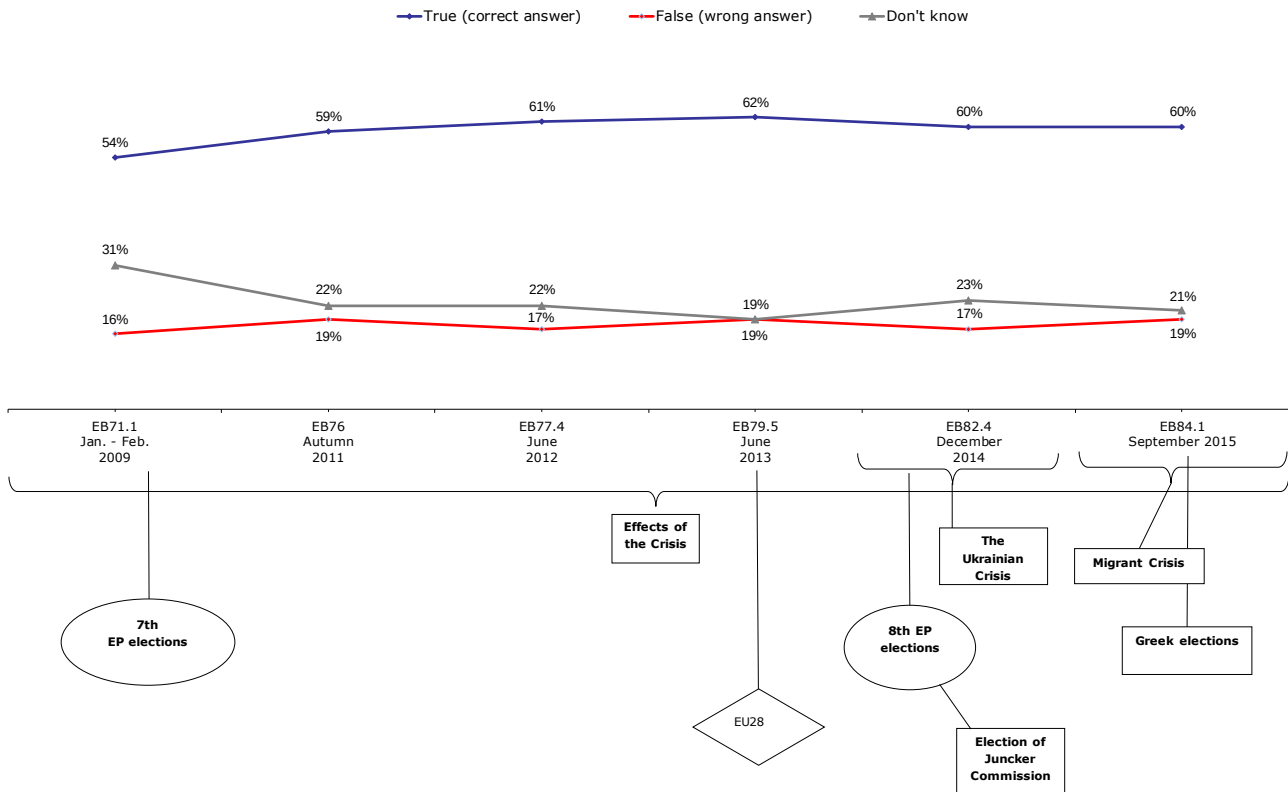
- The EU's budget is determined jointly by the European Parliament and the Member States-

— True (correct answer) — False (wrong answer) — Don't know



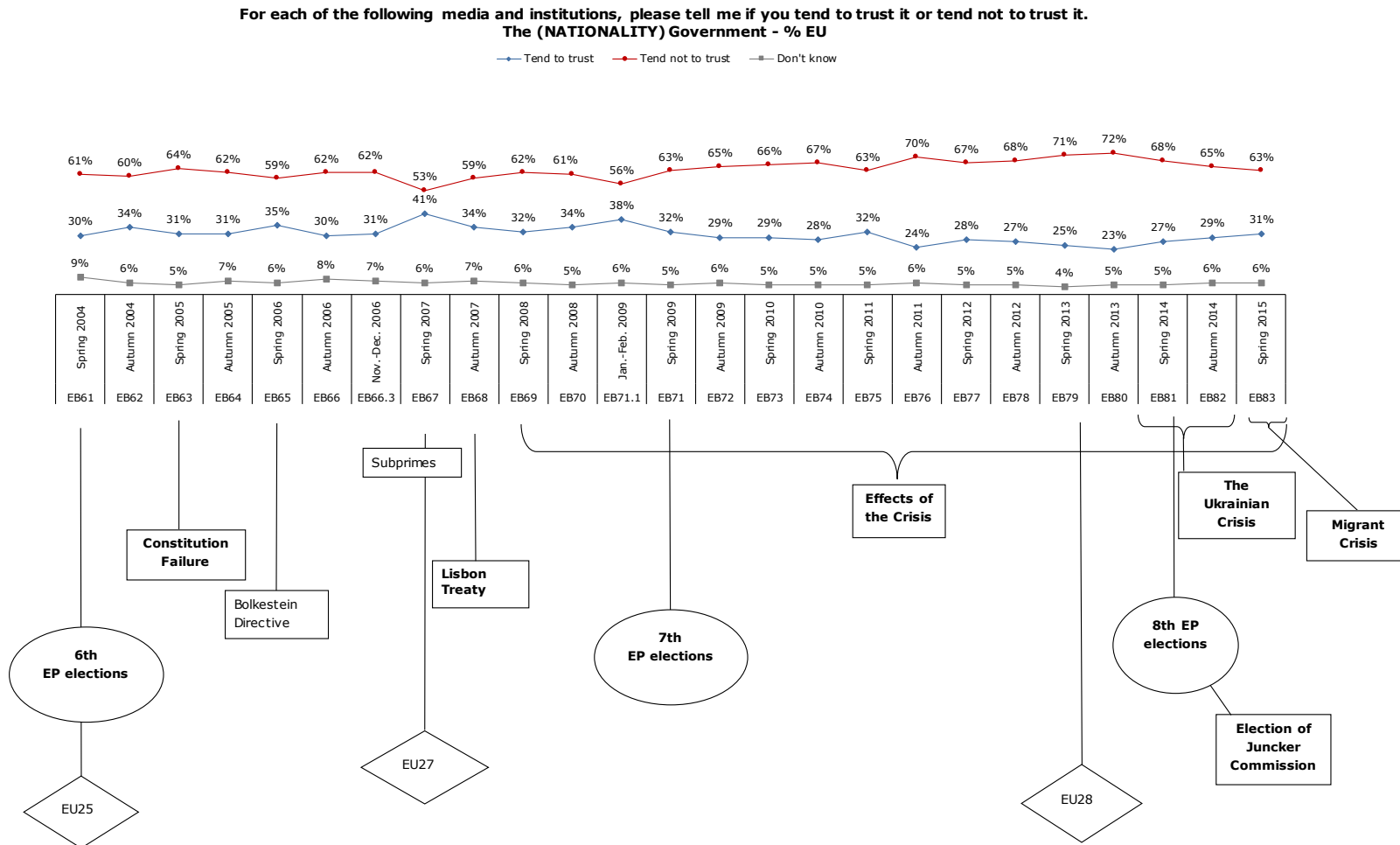
Broadly speaking, a majority of people are aware of the principle of agreement between the European Parliament and the Member States on European directives and regulations: this awareness crept up from January-February 2009 (EB71.1) to autumn 2011 (59%), and has remained at around 60% since.

For each of the following statements about the EU could you please tell me whether you think it is true or false.
 - At the EU level, European laws (directives and regulations) have to be agreed jointly by the European Parliament and the Member States -



6. TRUST IN NATIONAL INSTITUTIONS

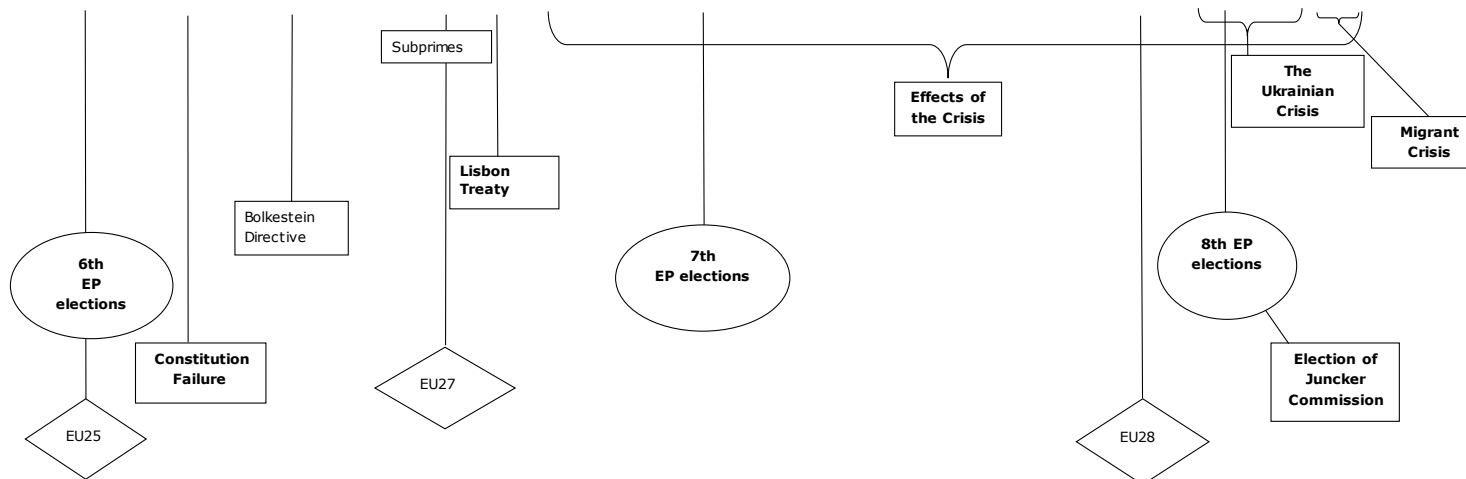
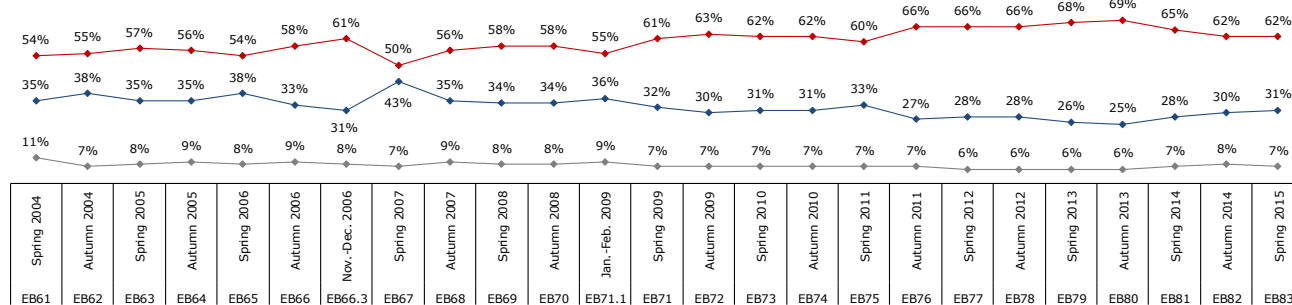
A large majority of Europeans do not trust their national government, and trust fell overall between 2004 and 2015. Having reached its lowest level in autumn 2013 (23% in EB80), this trust in the national government has improved slightly since, reaching 31% in the autumn 2015 survey.



Similarly, only a minority of Europeans trust their national Parliament. This trust in the national Parliament follows the same trends as trust in the national government: it fell slightly overall between 2004 and 2015, reaching its lowest level in autumn 2013 (25% in EB80). It has, **however, rallied recently, to 31% in spring 2015. In each of the surveys analysed, trust in the national Parliament very slightly exceeded trust in the national Government. However, trust in national institutions is lower than trust in the European Union,** even though the gap has tended to reduce since the start of the economic crisis.

For each of the following media and institutions, please tell me if you tend to trust it or tend not to trust it.

—●— Tend to trust —●— Tend not to trust —●— Don't know



II. DEMOCRACY IN THE EUROPEAN UNION

THE MAIN FINDINGS

- **In 2002, one European in five believed that their opinion mattered in the EU. In 2015, it was nearly two in five.**
- **Over the same period, the proportion of those believing that their opinion did not matter fell from almost seven in ten in 2002 to fewer than six in ten in 2015.**
- In most of the surveys analysed, **the majority of European citizens believe that their opinion matters in their country, a percentage that has considerably increased since 2008. A little more than six out of ten Europeans believe that their country's opinion matters in the EU**, but the number of people who think the opposite has increased since 2002.
- **The share of people feeling they are European citizens remained stable at above 50 per cent**, without being affected by the European Union's own issues and fluctuations in the economic and political climate. There were no significant changes in this indicator between 1992 and 2015. National identity was at its highest levels in the mid-1990s, on the eve of the introduction of the euro, and again in spring 2010 in the midst of the debt crisis engulfing several Member States. Feelings of European citizenship increased following the adoption of the euro and even in the midst of the economic crisis, in particular in 2012, and reached its highest point in 2015.
- **Feelings of belonging to the European Union split public opinion in two** over the period under review: It increased during the slightly contentious debate on the ratification of the Constitutional Treaty, which appeared to have had the effect of making the European Union a more tangible reality in the eyes of Europeans. The 2007 enlargement also had a positive effect on this feeling. It then dropped off, as a result of the financial and debt crisis in the Member States, which also affected all the other indicators, before bouncing back and exceeding 50 per cent in 2015.

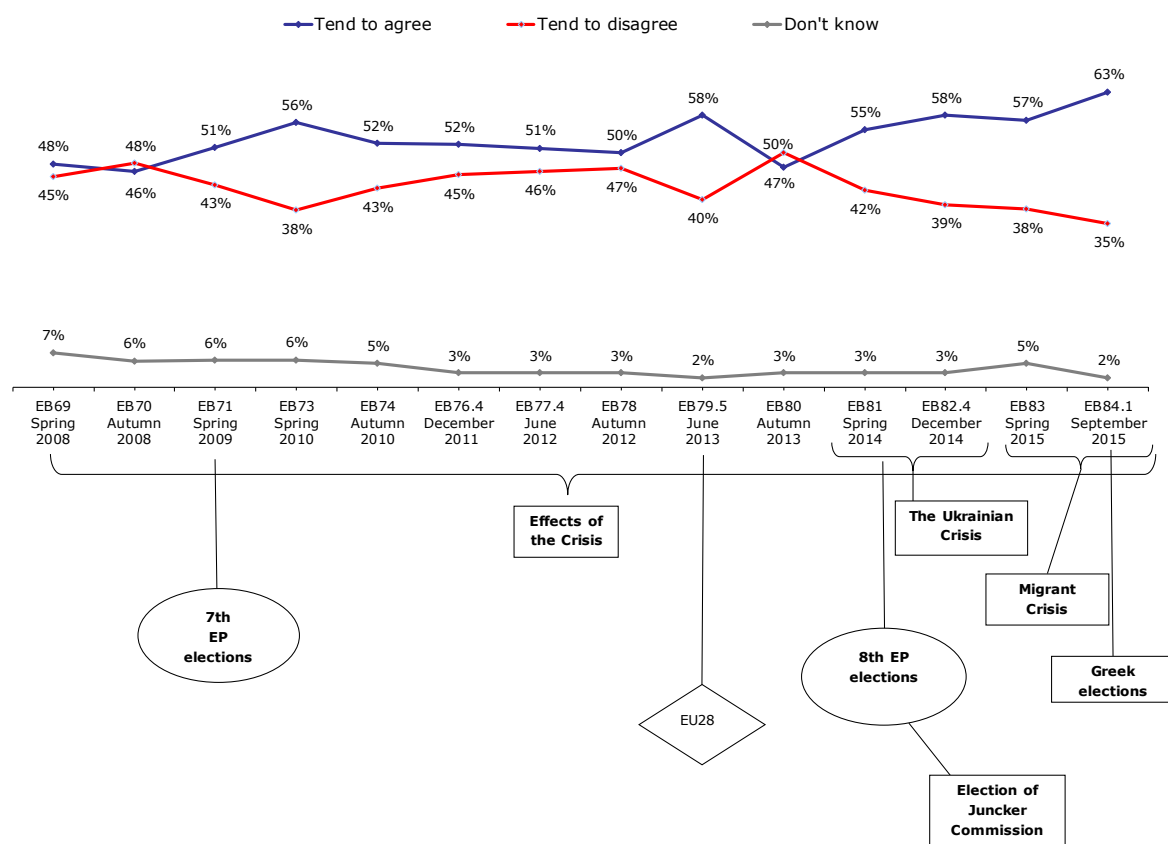
- Nevertheless, **a clear majority of Europeans share the feeling that what unites them in the EU is more important than what divides them.** They also identify as forcefully as ever, in spite of the crisis, several European Union identity markers, and in particular democratic values and the euro, which prove to be the principal elements constituting European identity.
- **The feeling of European citizenship remains strong in spite of the turmoil experienced by the European Union** in recent years.

1. THE VOICE OF EUROPEAN CITIZENS

Europeans have the increasingly strong conviction that their voice counts in their own country

Tested between spring 2008 (EB69) and the end of 2015 (EB84.1), more than half of Europeans believed that their opinion mattered in their own country⁷ with two exceptions: autumn 2008 (48% 'do not agree', against 46% 'agree') and autumn 2013 (50% against 47%), when a small majority of Europeans believed that their opinion mattered in their own countries.

Please tell me for each statement, whether you tend to agree or tend to disagree.
- My voice counts in (OUR COUNTRY)-



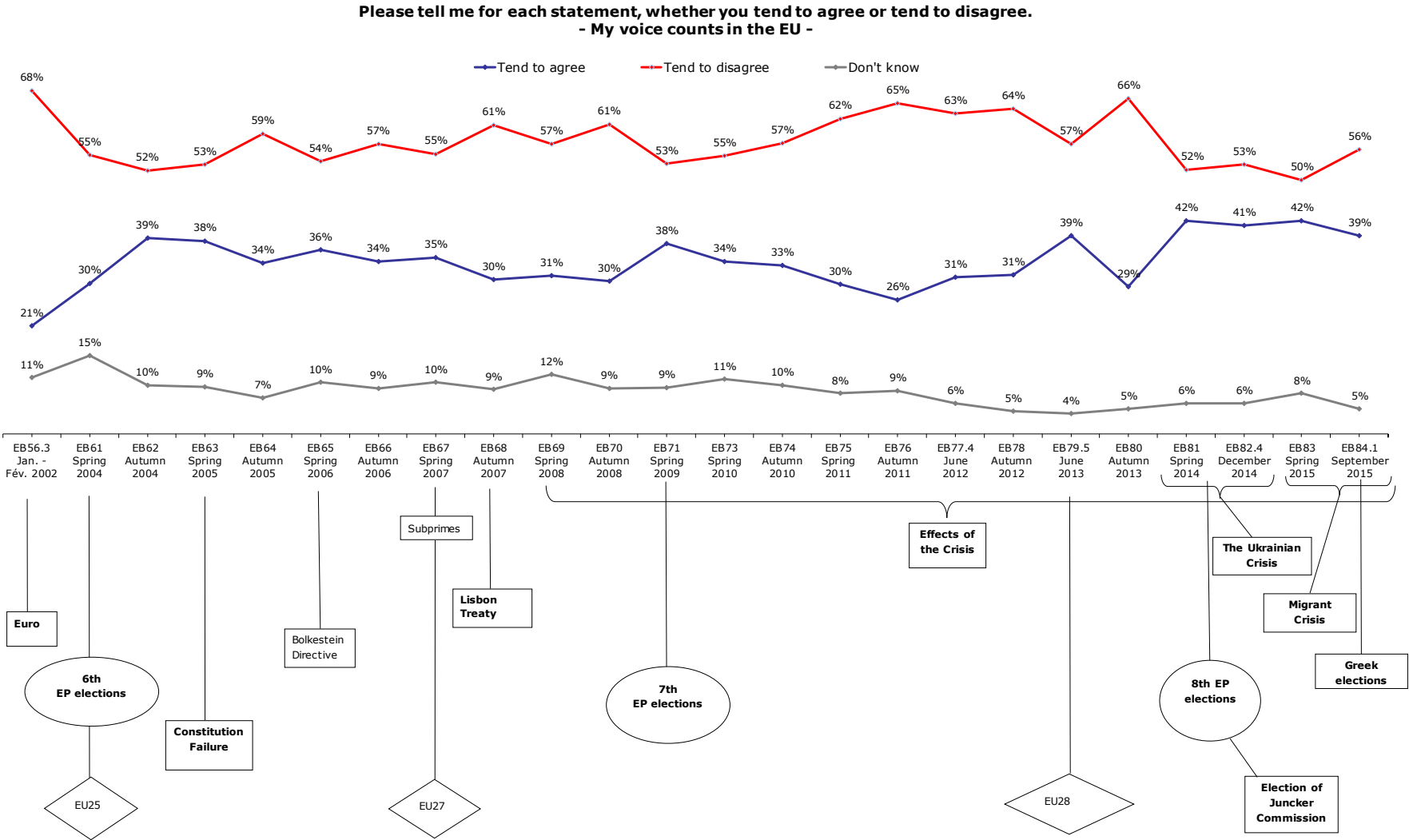
⁷ To what extent do you agree or disagree with each of the following statements?
 - My opinion matters in (OUR COUNTRY) -

The majority of Europeans believe that their opinion does not matter in the EU.

Less than half of Europeans consulted between the beginning of 2002 (EB56.3 January-February 2002) **and September 2015** (EB84.1) **believed that their opinion mattered in the European Union;**⁸ **at no point in the period did this proportion exceed 50%.** As a trend, this feeling has gained traction since 2002, rising from 21% in EB56.3 in 2002 to 39% in September 2015 (EB84.1). **This conviction spiked in surveys taken in the wake of European elections:** in 2004 (+9 points, to 39% in EB62), in 2009 (+8, to 38% in EB71), and in 2014 (+13 to 42% in EB81).⁹

⁸ To what extent do you agree or disagree with each of the following statements? - My opinion matters in the EU -

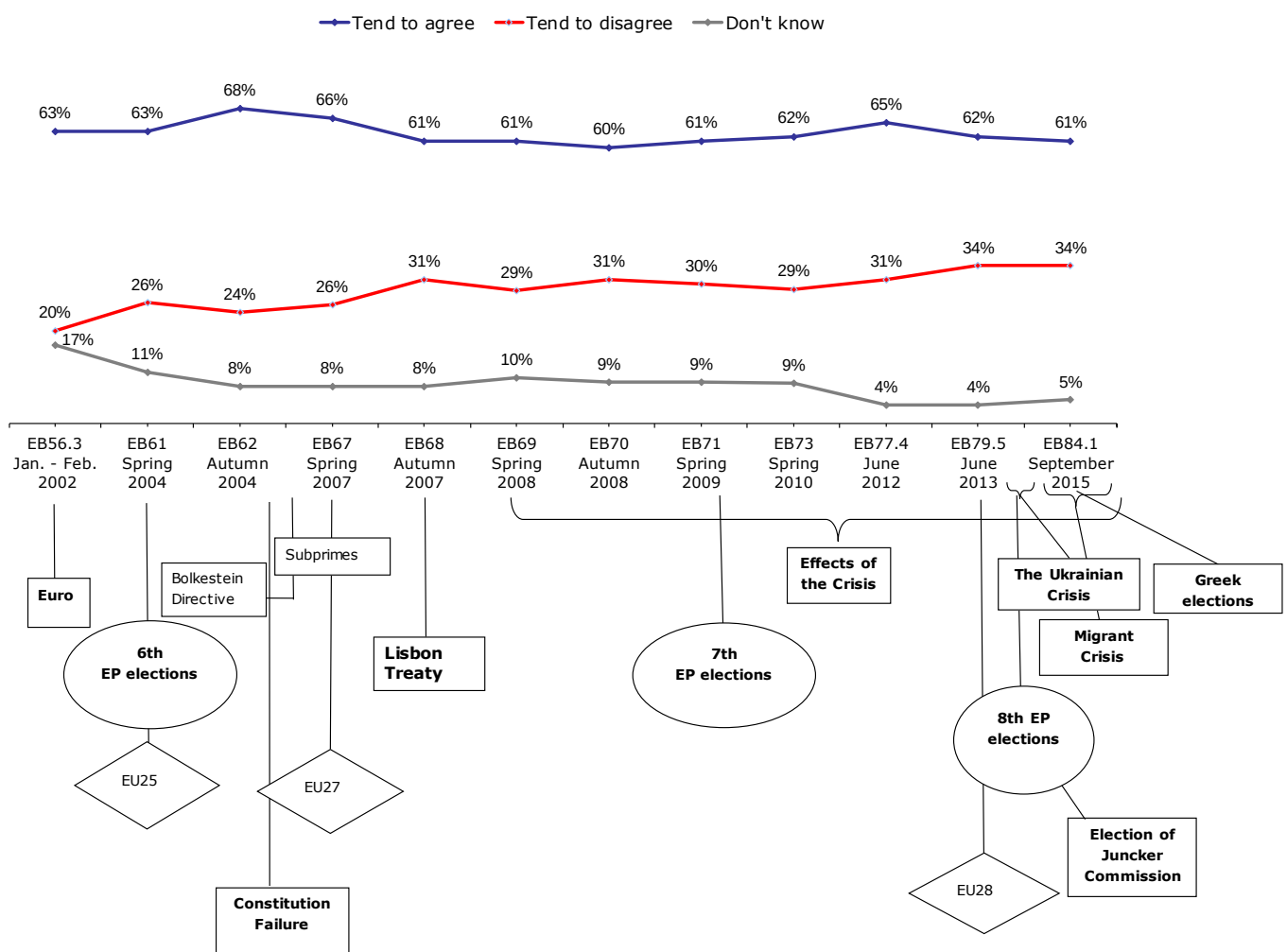
⁹ Survey EB61 in spring 2004 was conducted prior to the European elections of 2004. Surveys EB71 in spring 2009, and EB81 in spring 2014 were conducted *on the day after* the European elections.



More than six out of ten Europeans believe that their country's opinion matters in the EU

Considerably less than half of Europeans consulted between early 2002 (EB56.3) and September 2015 (EB84.1) believed that their country's opinion mattered in the European Union.¹⁰ Despite minor fluctuations, this proportion remained at or above 60% at all times. However, the proportion of people who do not agree with this opinion is trending upwards, from 20% in EB56.3 in January-February 2002, to 34% in September 2015 (EB84.1).

Please tell me for each statement, whether you tend to agree or tend to disagree.
- (OUR COUNTRY)'s voice counts in the European Union -

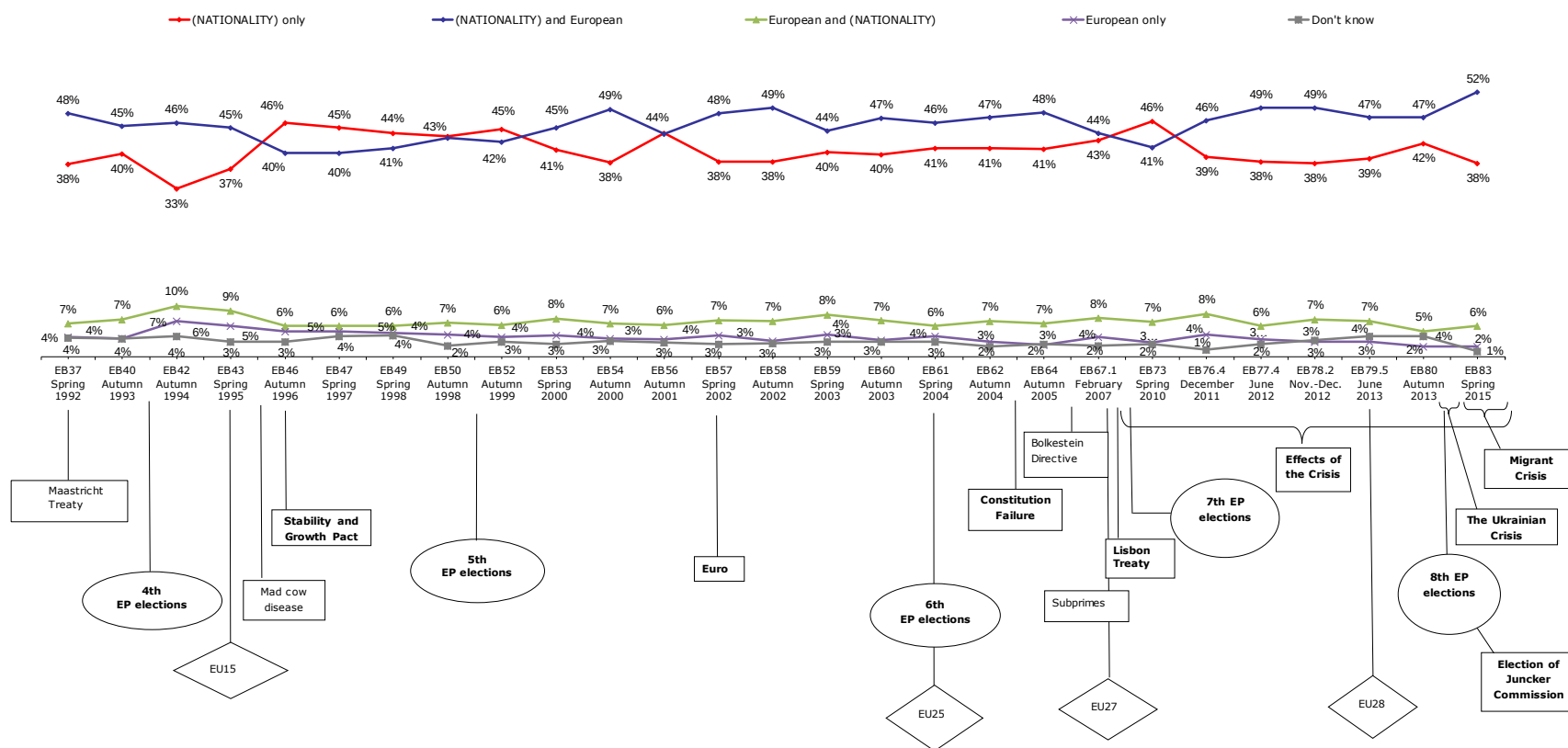


¹⁰ To what extent do you agree or disagree with each of the following statements?
- (OUR COUNTRY'S) opinion matters in the EU -

2. A FEELING OF EUROPEAN CITIZENSHIP WHICH SURVIVES THE CRISIS

In most of the surveys analysed, **the majority of Europeans say that they see themselves as national and European** (in proportions of between 40% and 50%), except in the most recent survey, which saw the proportion seeing themselves as European rise to 52%. **A significant proportion of people see themselves solely as national**, a view held by the majority between autumn 1996 and spring 1998, in autumn 1999 and in spring 2010.

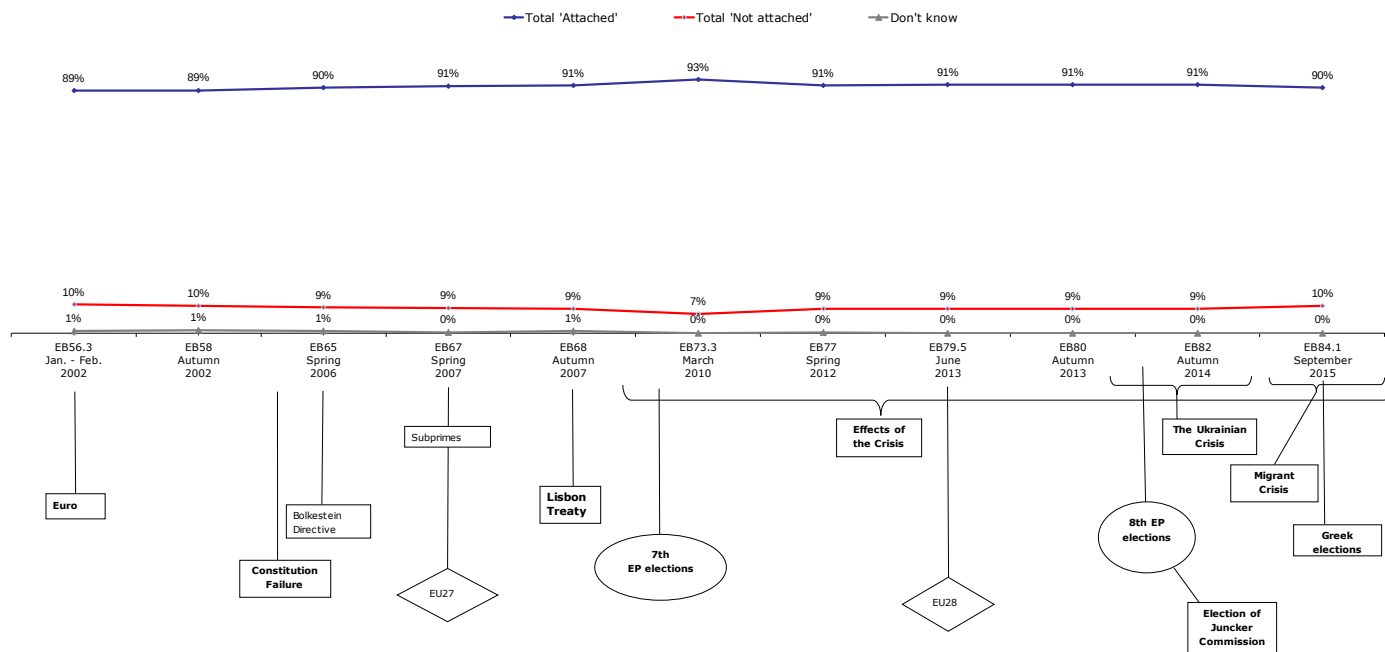
Do you see yourself as ...?



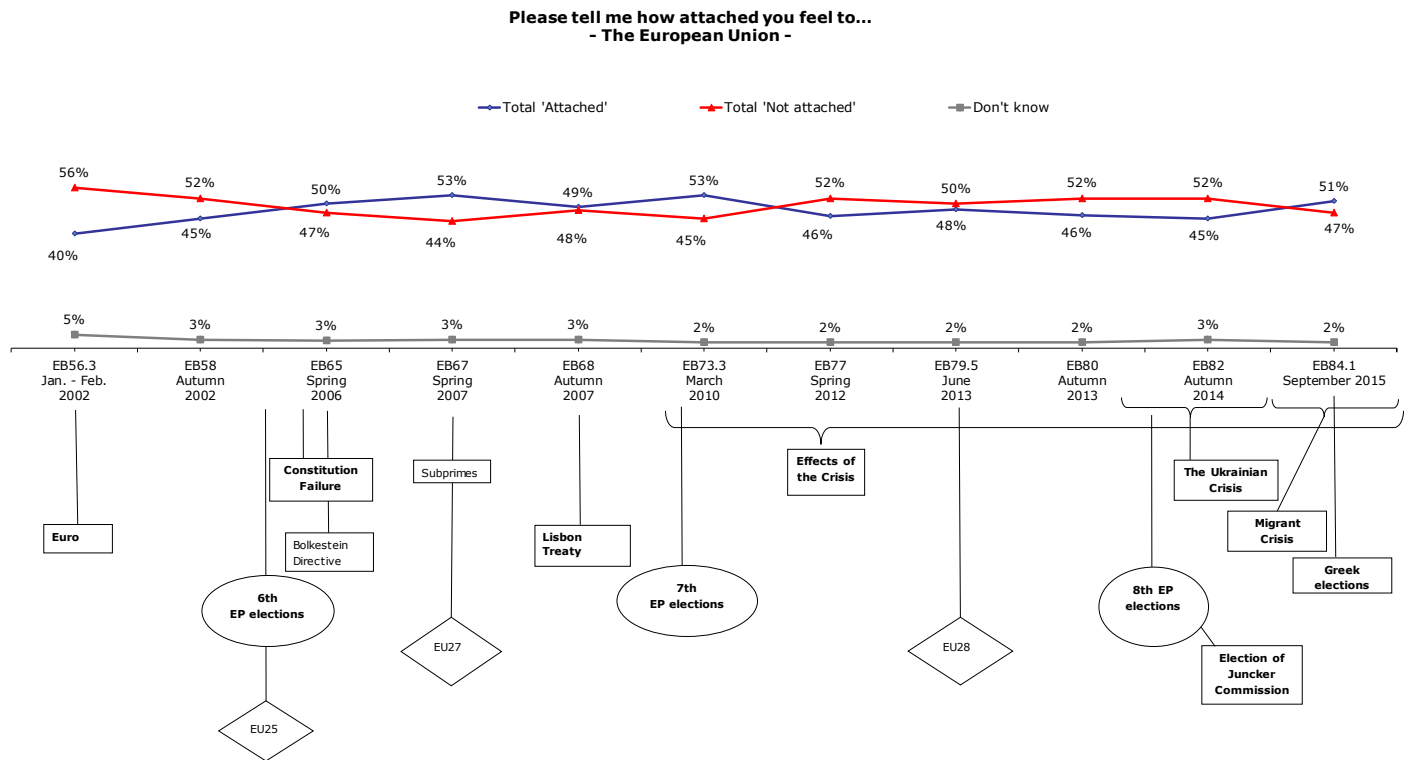
3. AN ENDURING ATTACHMENT TO THE EUROPEAN UNION

The attachment of Europeans to their country at around 90% remains very strong and stable over time (around 90% between EB56.3 in January-February 2002 and EB84.1 in September 2015).

People may feel different levels of attachment to their village, town or city, to their region, to their country or to the European Union. Please tell me how attached you feel to...
- (OUR COUNTRY) -



Europeans are clearly more divided when it comes to their attachment to the European Union: after being in the majority between EB65 in spring 2006 and EB73.3 in March 2010, it once again dipped below 50% between EB77 in spring 2012 to autumn 2014. This attachment then bounced back, returning to being a majority opinion in September 2015 (EB84.1).

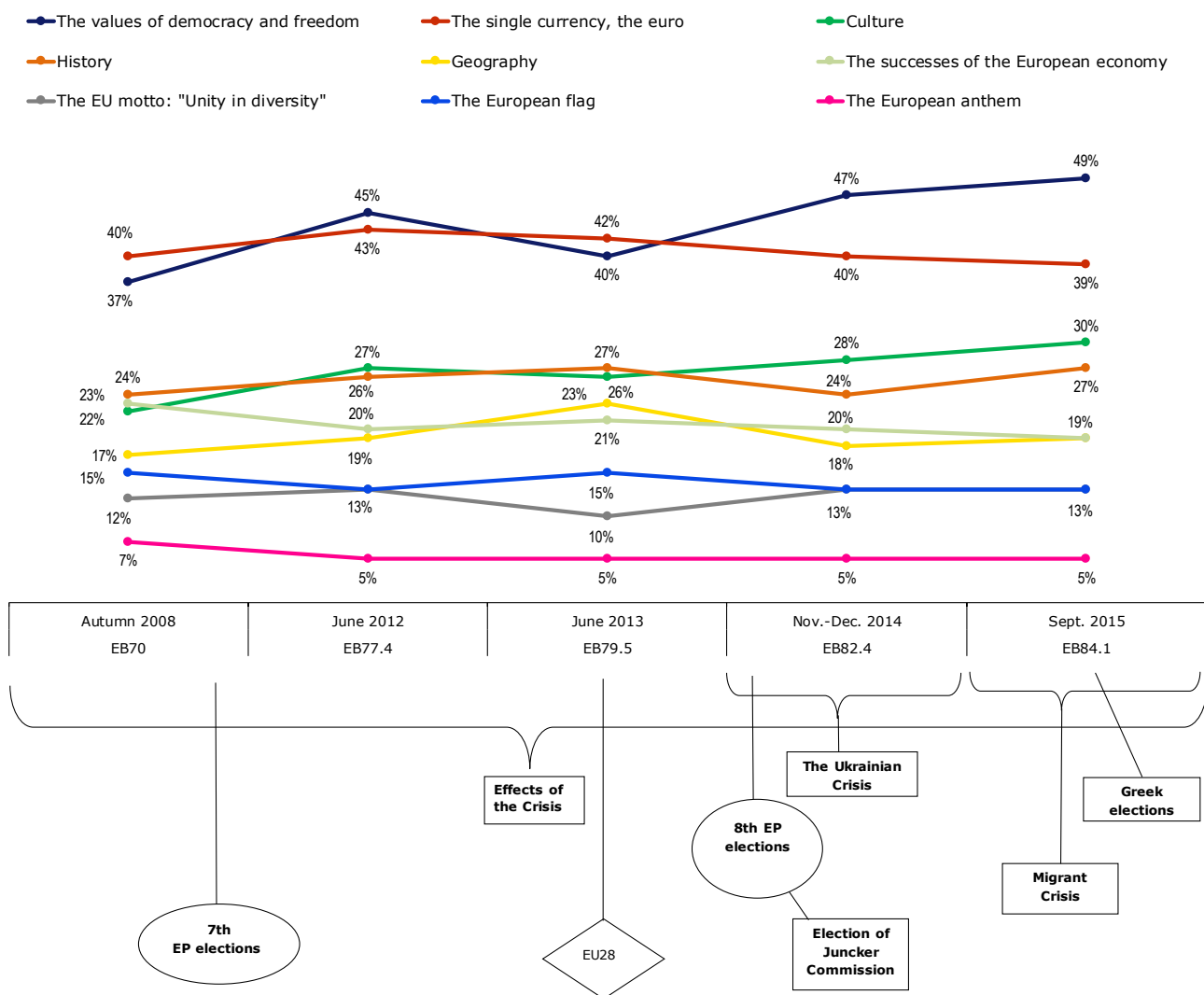


4. THE COMPONENTS OF AN EU IDENTITY

→ Identity markers which persist despite the crisis

'The values of democracy and freedom' were identified by respondents as the main element underpinning the EU's identity in their eyes¹¹ (47% in EB84.1 of September 2015). The euro came in second place (39% in September 2015). This was followed by culture (30%) and history (27%). Other considerations are cited by less than a fifth of Europeans.

The European identity can be composed of several elements. In your opinion, which of the following are the most important elements that go to make up the European identity?
(MAX. 3 ANSWERS) - % EU

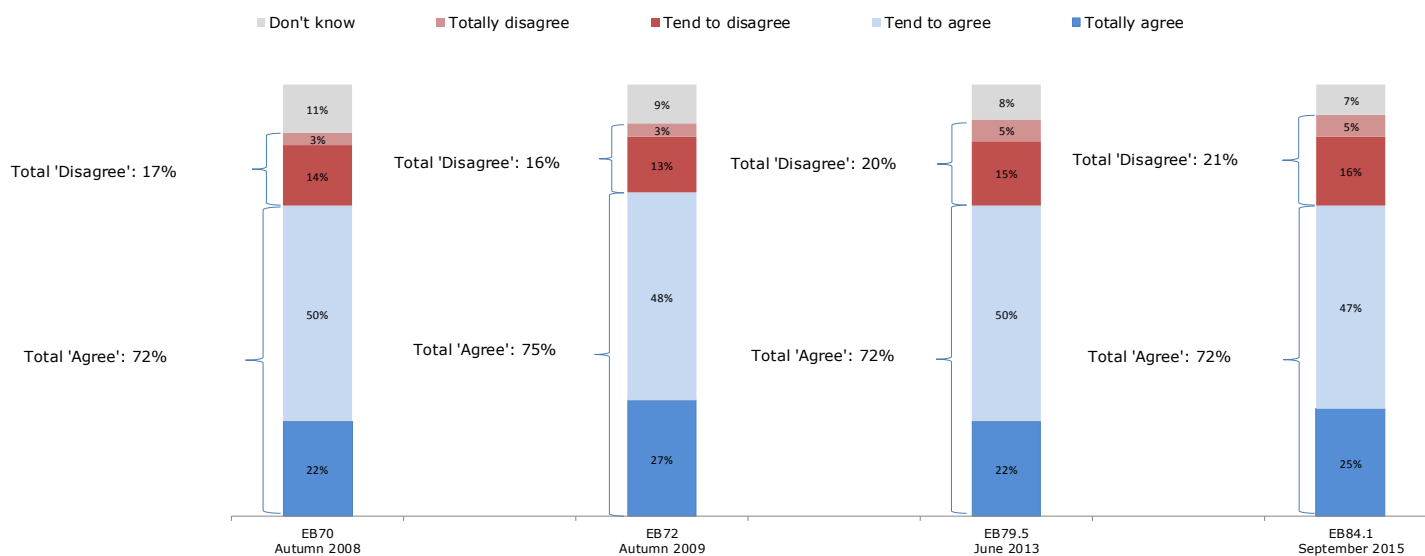


(MAXIMUM 3 POSSIBLE RESPONSES)

¹¹ European identity can be composed of several elements. In your opinion, which of the following are the most important elements that go to make up the European identity? (MAXIMUM 3 POSSIBLE RESPONSES)

Some three quarters of Europeans agree with the following statement regarding the building of Europe: **'what unites the citizens of the various countries is more important than what divides them'**. This has been the case on each occasion when the question was asked, in autumn 2008 (EB70), autumn 2009 (EB72), June 2013 (EB79.5) and September 2015 (EB84.1).

**Can you tell me whether you agree or disagree with the following statement:
- What brings the citizens of the different EU Member States together is more important than what separates them. -**



III. THE ECONOMY IN THE EU

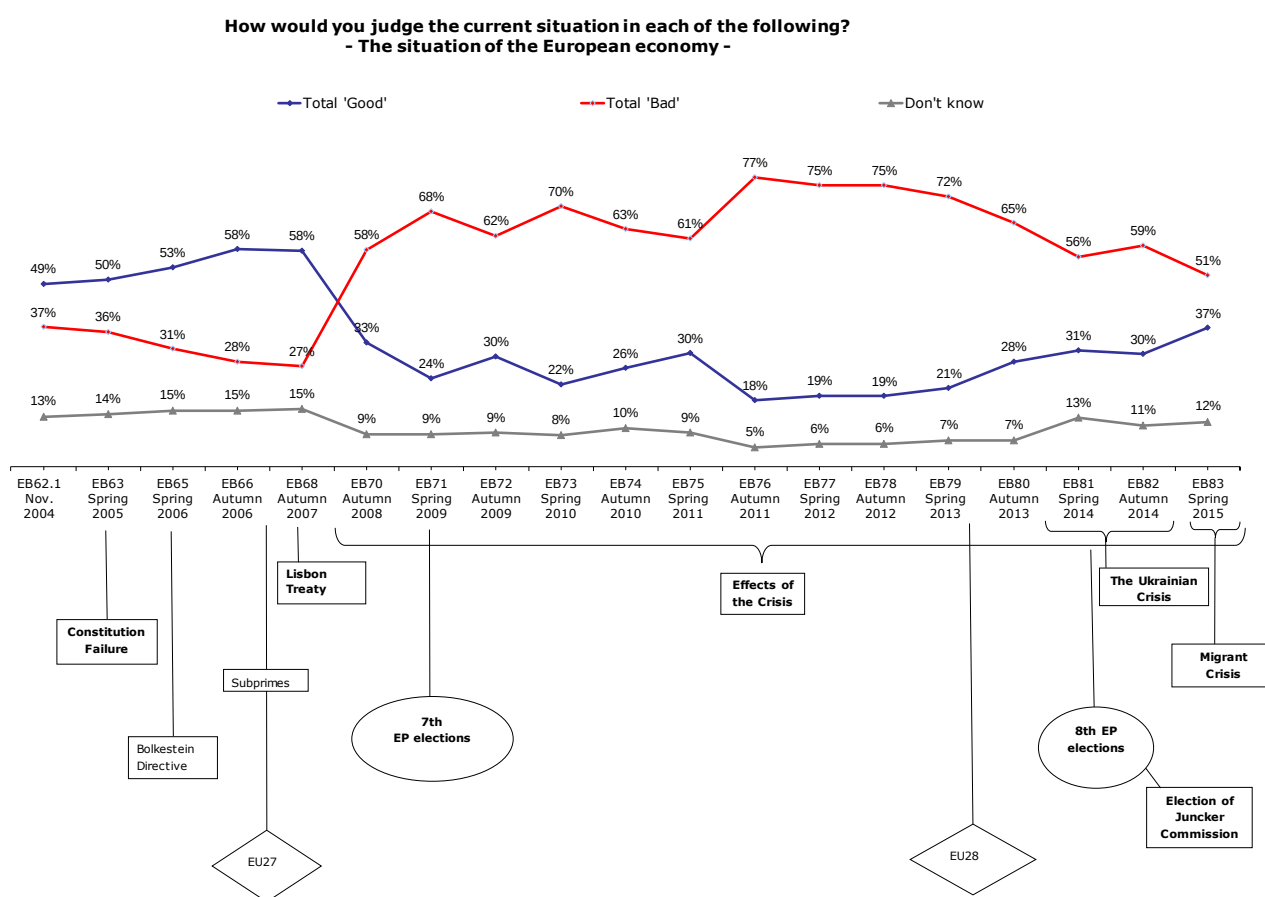
THE MAIN FINDINGS

- **The economic crisis has had a major impact on how Europeans perceive the economic situation in their countries and in the EU:** Both are currently perceived as bad, although this perception has improved in recent surveys.
- While prior to the crisis Europeans perceived their national economies to be in worse shape than the EU economy, this has been reversed due to the debt crisis. **The EU therefore no longer seems to be a reassuring point of reference in the crisis.**
- **In terms of short-term expectations,** the most recent survey from spring 2015 (EB83) brings the first signs of optimism **regarding the various aspects that were examined** (national and European economic situation, national employment situation). Over the whole period under review, the predominant sentiment was that things would not change.
- **Other signs of tension:** Although European public opinion remains largely in favour of coordinated responses to deal with the crisis, an increasing proportion of Europeans would like to see individual measures taken.
- Today, **the proportion of Europeans who want to wait until all the Member States are ready before stepping up the development of a common European policy is significantly higher** than the proportion who want to do it without waiting until the other Member States are ready.
- Nonetheless, the fact that **Europeans continue to view the EU as the most credible actor to act effectively in response to the crisis** is an encouraging sign.
- **The keys to strengthening economic performance** are training and innovation, but the crisis has brought other issues to light, such as reducing public debts, and has undermined investment strategies.
- **Europeans' expectations of the EU are mainly focused on the economy:** they would like the European budget to be allocated, first and foremost, to social affairs, employment and economic growth.

1. THE EUROPEAN ECONOMIC SITUATION AND THAT OF THE NATIONAL ECONOMY

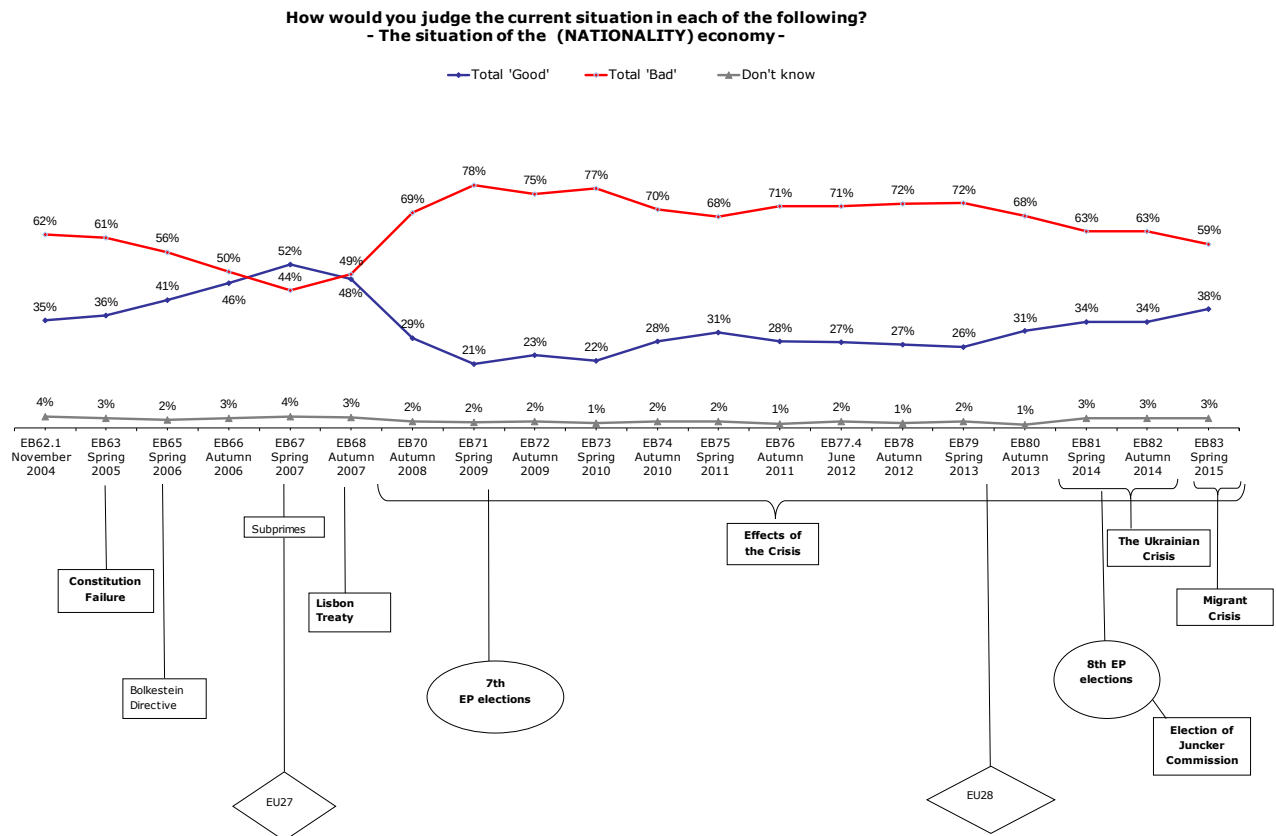
Judgments about the European economy and about the national economy veered wildly towards negative in 2008, after the onset of the economic crisis.

The judgments of Europeans about the economic situation of the European Union¹², which were positive and on an upward trend from November 2004 (EB62.1) until autumn 2007 (EB68) became negative from autumn 2008 (EB70). They reached their lowest level in autumn 2011 (EB76), right in the midst of the debt crisis (18%). Since then, they have grown almost continuously, reaching 37% in spring 2015 (EB83). Over the same period, negative judgments have fallen from 77% in autumn 2011 to 51% in spring 2015.

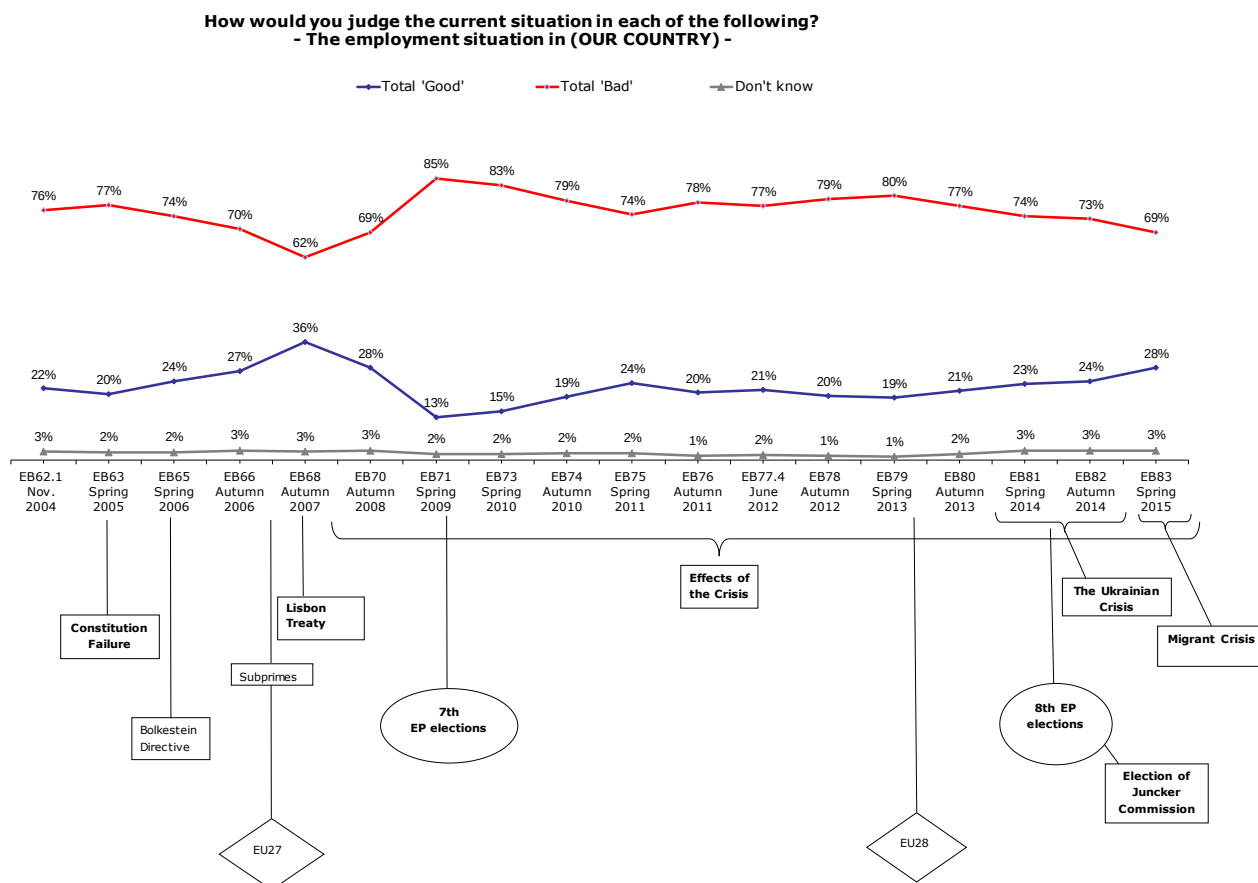


¹² How would you judge the current situation in each of the following? Situation in (OUR COUNTRY'S) economy/Situation in the European economy/Employment situation in (OUR COUNTRY).

The judgments of Europeans about the situation of the economy in their country follow the same trend: **increase from 2004 to 2007, then rapid deterioration in 2008**. The main difference in the perception of the European economy was that the judgments were negative in 2004 and remained negative throughout the period under review, with the exception of spring 2007 (52% of the total 'good' against 44% in EB67). Since 2009, these judgments have gradually improved, rising from 21% in spring 2009 (EB72) to 38% in spring 2015 (EB83).



The assessment of the employment situation at national level has seen a similar change over the period, with negative judgments a clear majority, an improvement in 2007 and a significant deterioration in autumn 2008 and spring 2009. Since then, judgments have improved slightly, whilst still remaining broadly negative.



2. ECONOMIC PROJECTIONS

Economic projections as a whole are fairly gloomy: fewer than one third are optimistic, whichever indicator is analysed.

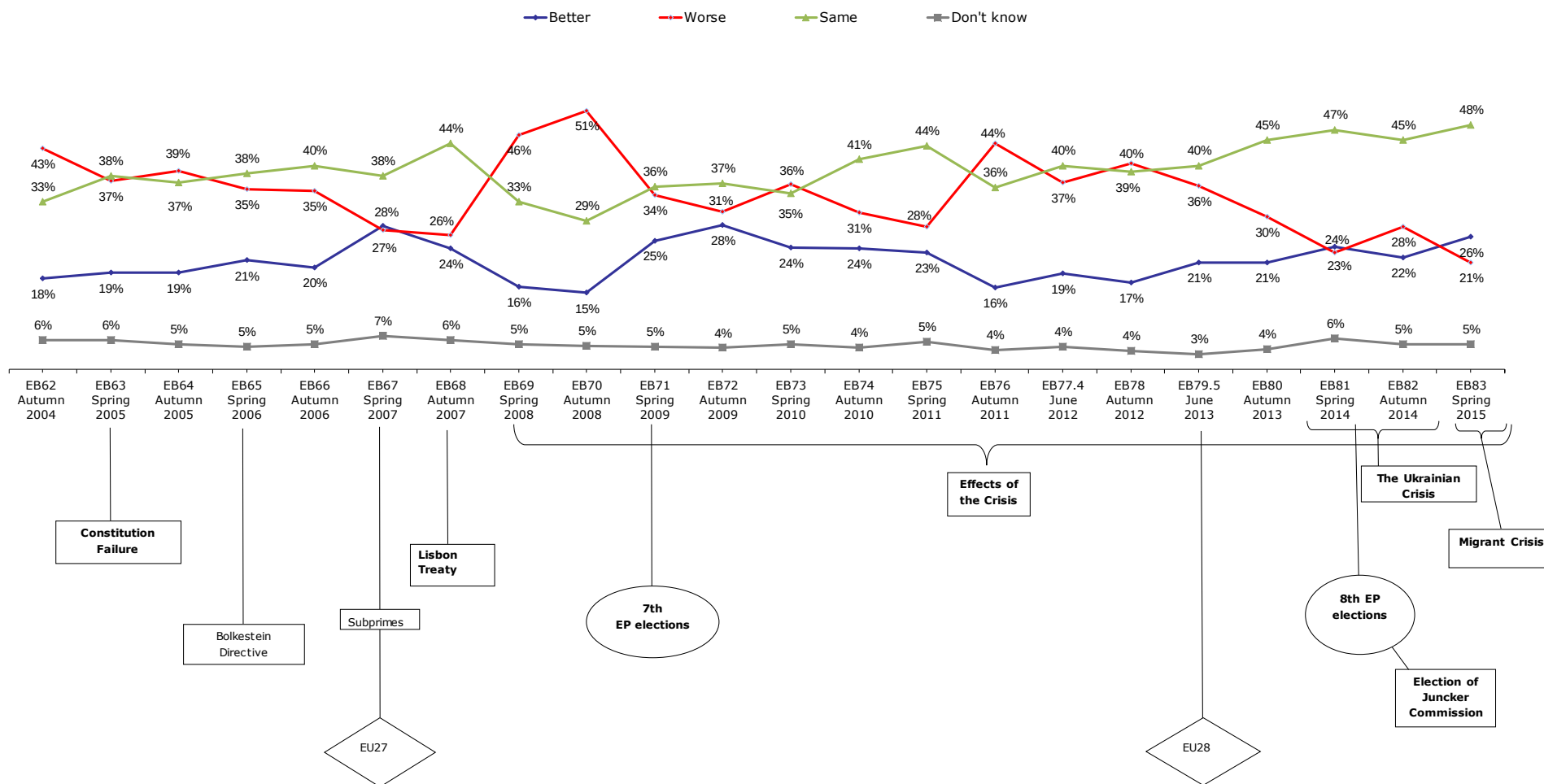
Projections about the national economic situation for the coming 12 months¹³ are dominated by pessimism, which wins out over optimism across virtually the whole of the period analysed (from autumn 2004 (EB62) to spring 2015 (EB83)).

A key development occurred in spring 2015, and for only the third time: optimism once again started to predominate (26% thought that the coming 12 months would be 'better', while 21% thought they would be 'worse').

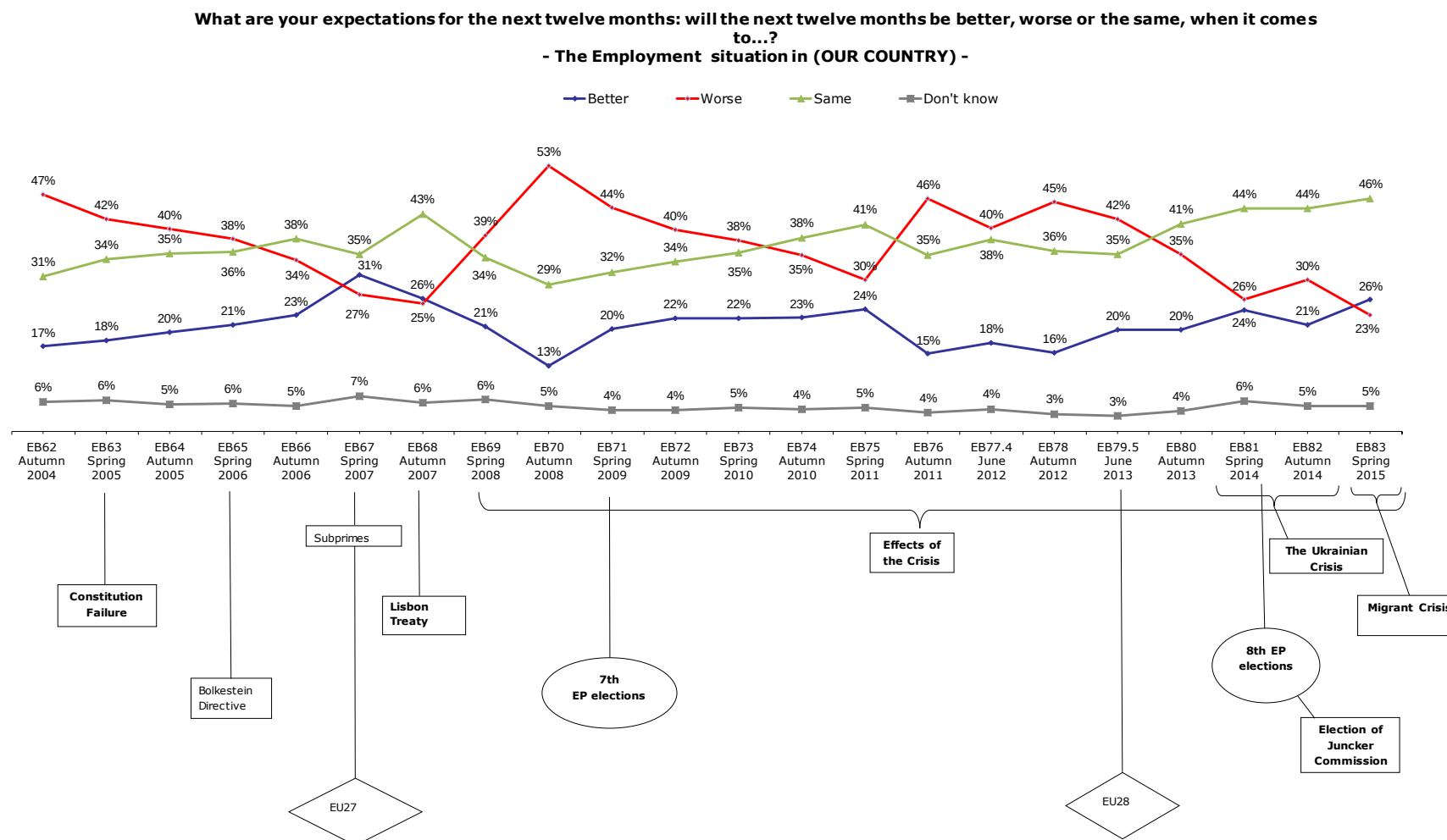
Over and above these two aspects, it is the response 'no change' which takes a clear lead.

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...? Situation in the economy (NATIONALITY)/Situation in the European economy/Employment situation in (OUR COUNTRY).

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

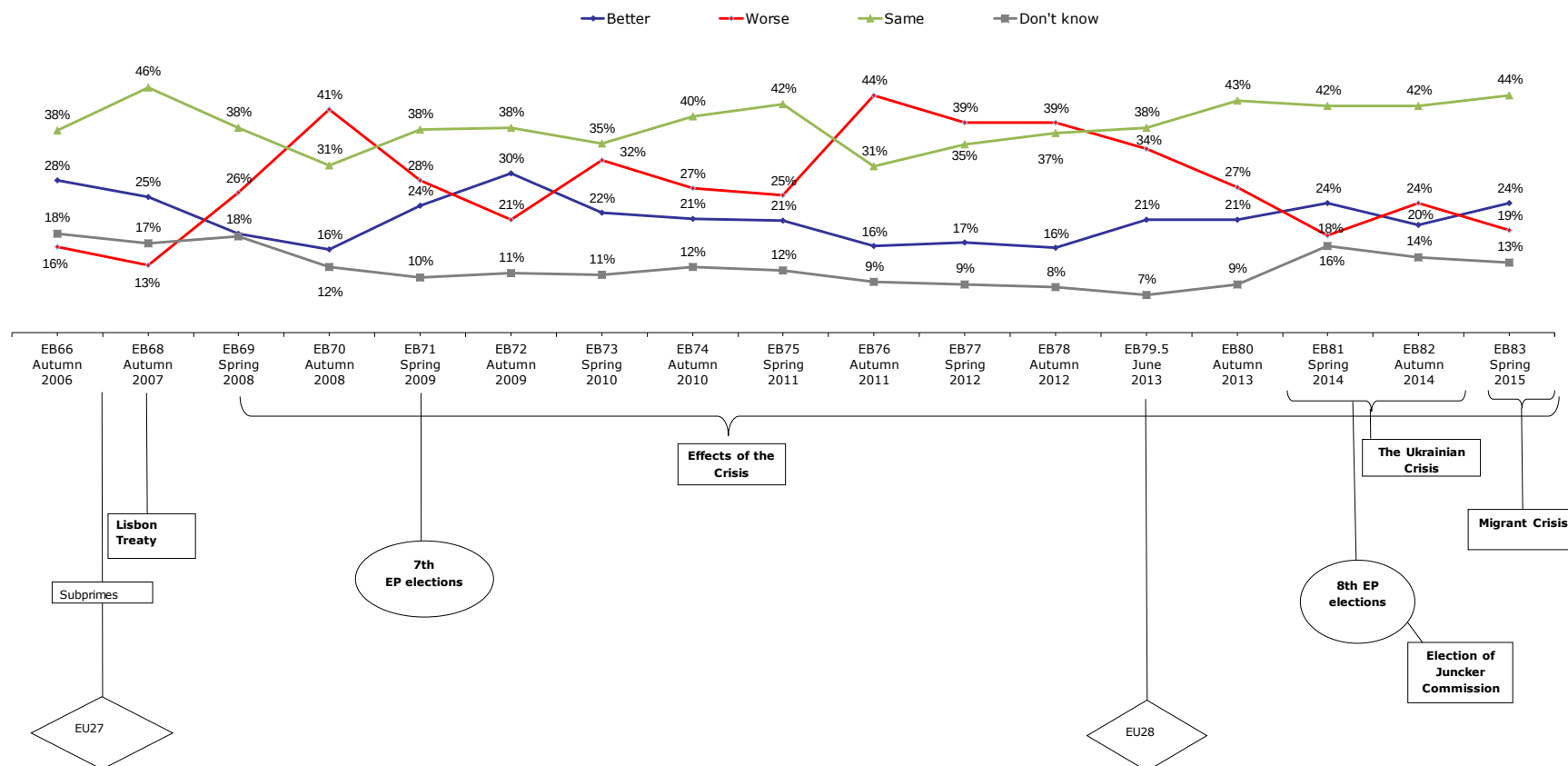


The projections for employment at national level have also, for the most part, remained pessimistic across a large part of the period under review (the surveys in spring 2007 (EB67), autumn 2007 (EB68) and spring 2015 (EB83) being the only exceptions).



In the case of the projections for the European economy, the pessimists mostly prevail over the optimists. However, across the whole of the period (from autumn 2006 (EB66) to spring 2015 (EB83)), the response 'no change' is in the majority in most of the surveys analysed.

What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?
- The economic situation in the EU -

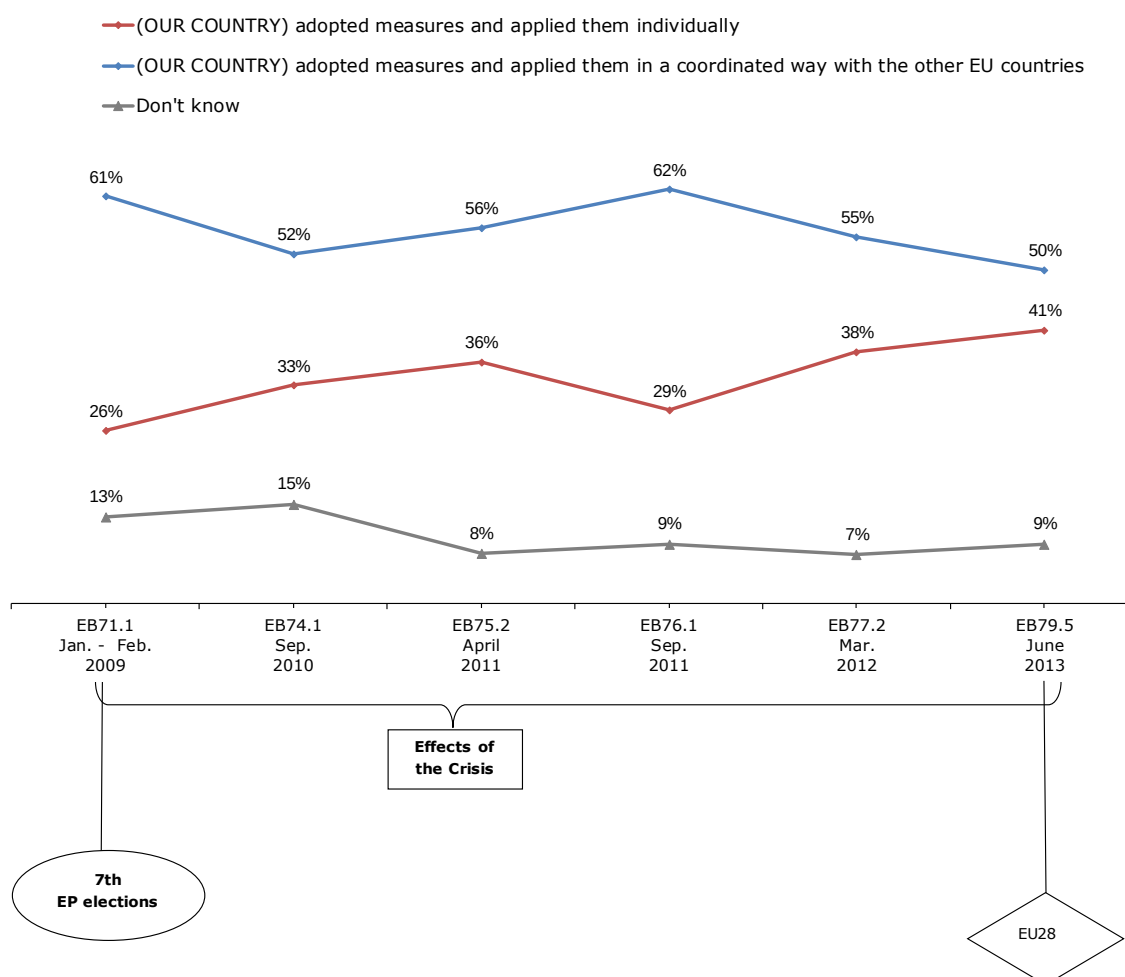


3. THE EUROPEAN UNION IN THE FACE OF THE CRISIS

In spite of serious concerns relating to the economic difficulties, Europeans continue to favour joint action by means of coordinated measures to individual measures.

The proportion of Europeans who believe that they would be better protected against the financial and economic crisis if their country adopted measures individually rose between the start of 2009 and June 2013¹⁴: it moved gradually from 26% to 41%. Over the same period, the proportion of those advocating measures taken in a coordinated manner with other EU countries went from 61% to 50%: they remain in the majority, however.

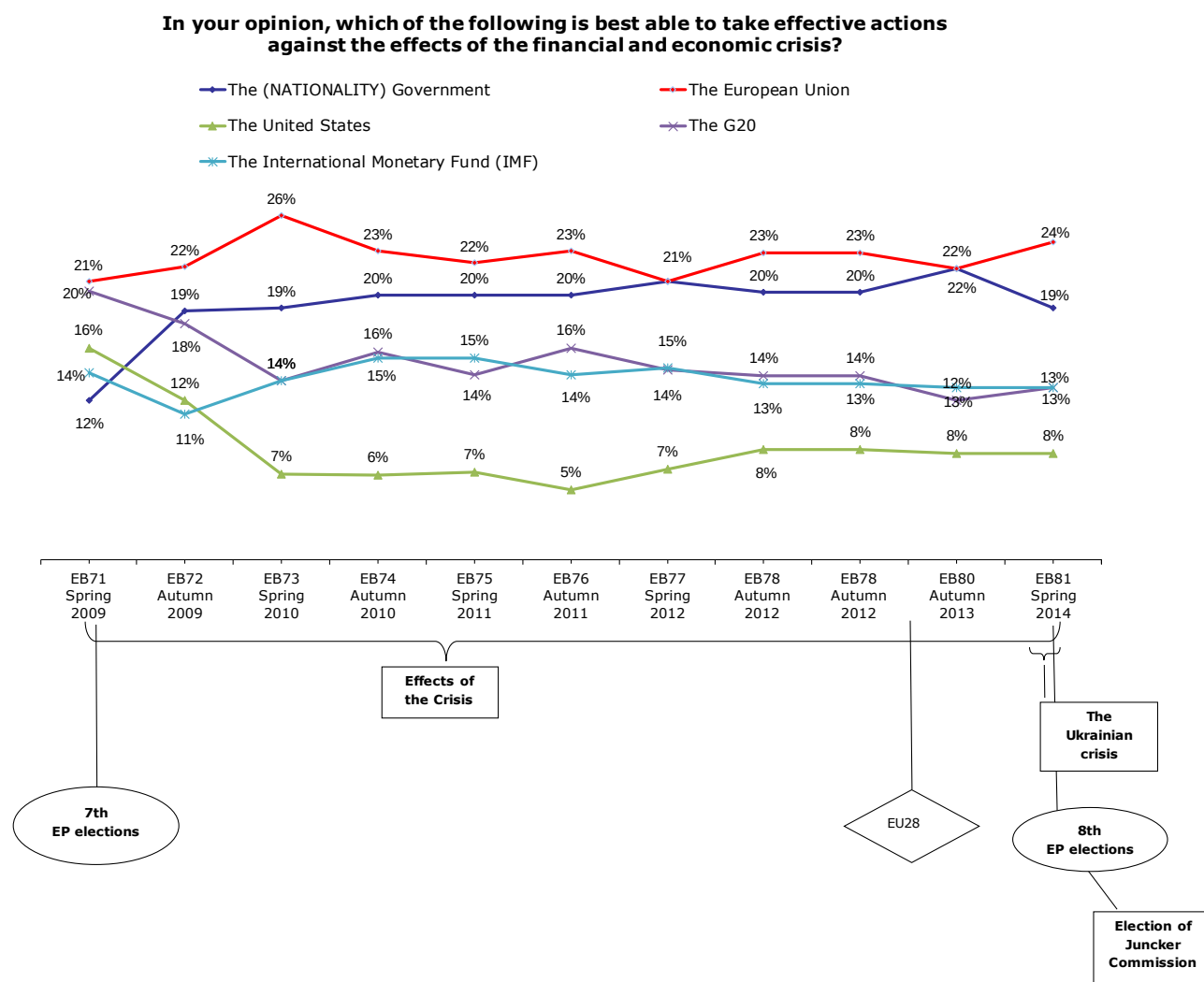
As a citizen would you say that you would be better protected in the face of the current crisis if...?



¹⁴ As a citizen, do you feel that you would be better protected against the current crisis if...? (OUR COUNTRY) adopted measures and applied them individually/(OUR COUNTRY) adopted measures and applied them in a coordinated manner with other EU countries/ Don't know.

The European Union remains the player best placed to take effective action in response to the crisis

The European Union heads the field of players seemingly best placed to take effective action against the effects of the crisis, closely followed by national governments. Other players such as the G20, the IMF and the United States were cited less often.

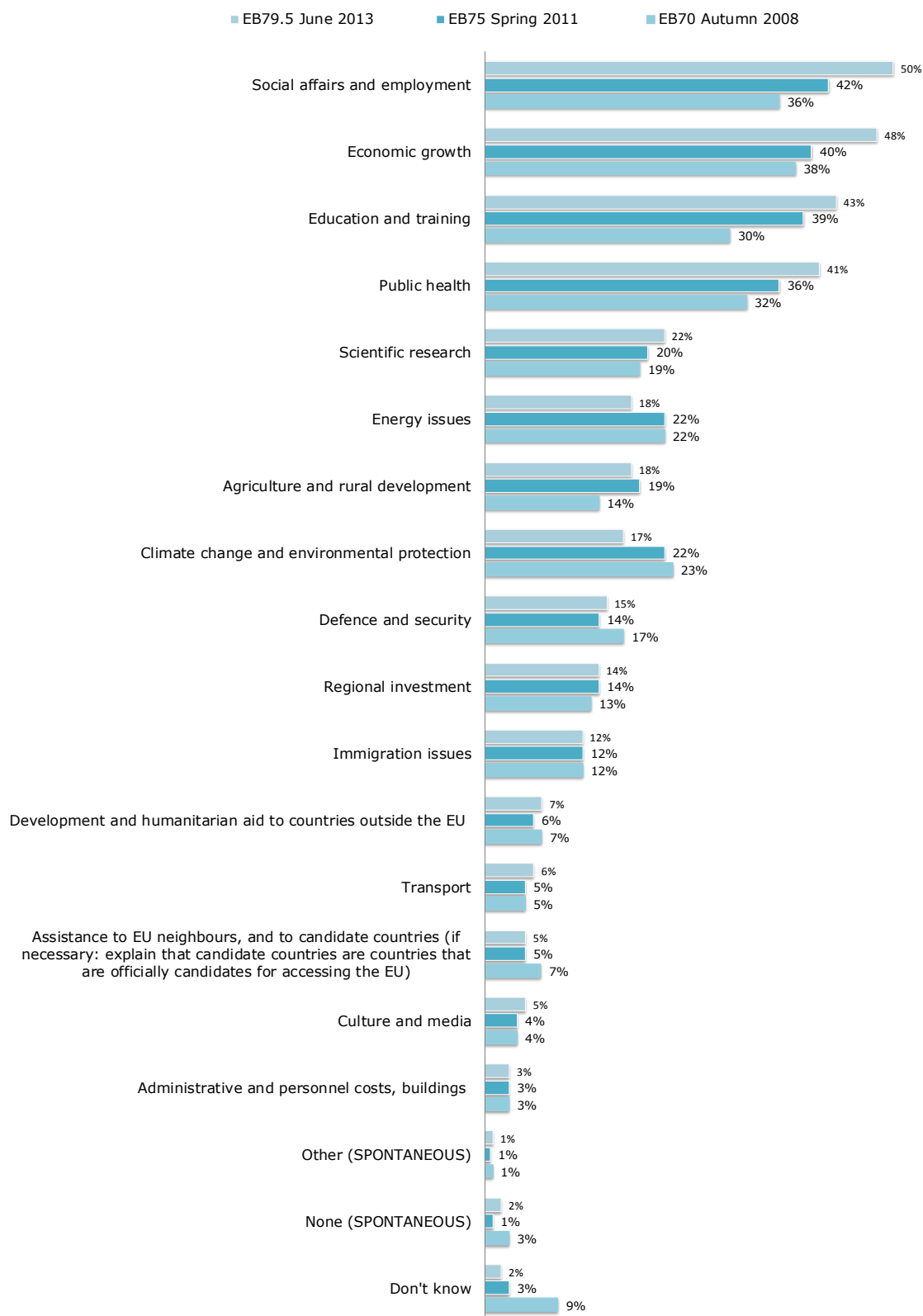


High but differing expectations of the European Union

When asked where they would like to see the European Union's budget allocated to as a priority¹⁵, Europeans cited a range of areas, reflecting high but differing expectations of the EU. Two economic matters head the list: **social affairs and employment** (50% in June 2013 – i.e. +14 points since the first time this question was asked, in autumn 2008, in the EB70), and **economic growth** (48%, +10 points). These are followed by **education and training** (43%, +13 points), and **public health** (41%, +9 points). Other considerations are cited by less than a quarter of Europeans.

¹⁵ And on which of the following would you like the EU budget to be spent? Firstly? And then? (YOU MAY SELECT UP TO 4 AREAS)

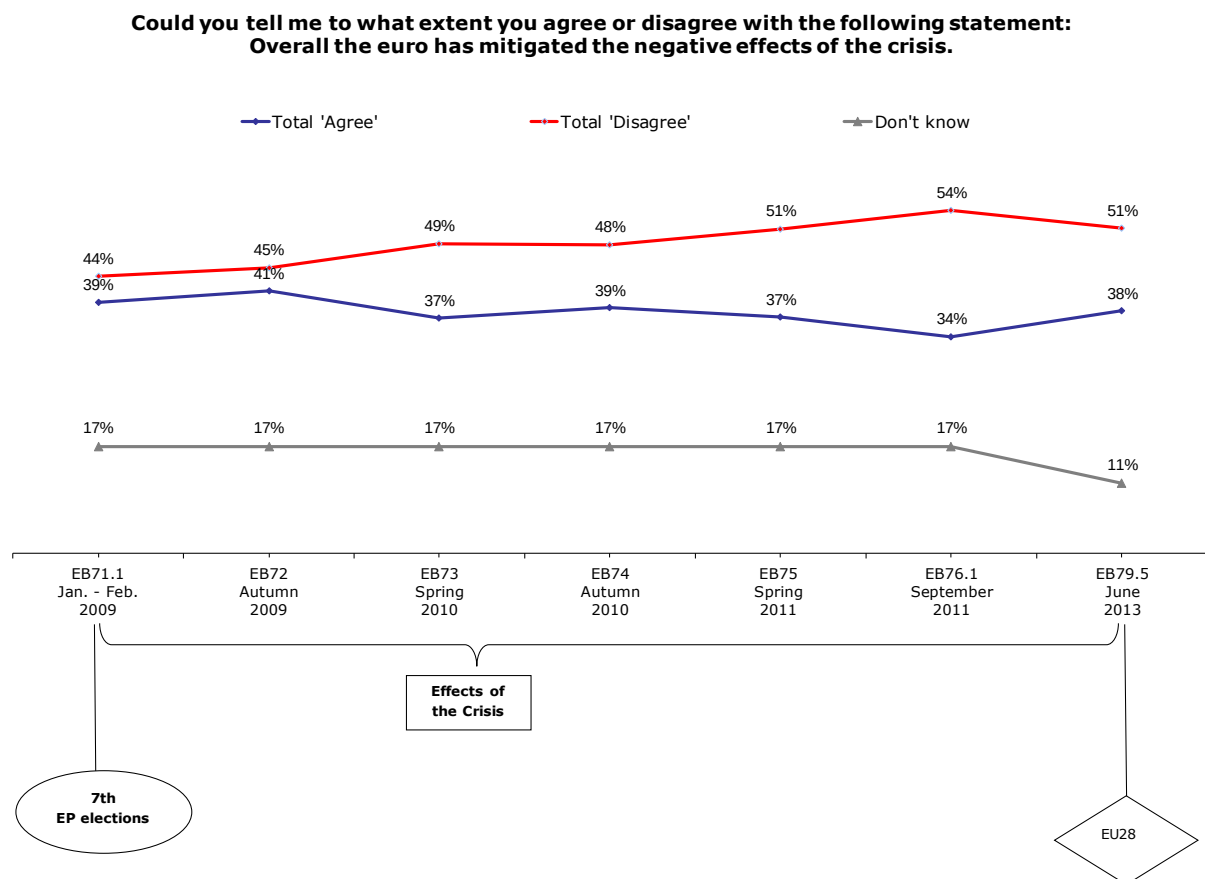
And on which of the following would you like EU budget to be spent? Firstly? And then?



(PLEASE SELECT A MAXIMUM OF 4 AREAS)

A growing majority do not feel that the euro has limited the impact of the crisis

Although Europeans see the European Union as a credible player when it comes to addressing the financial and economic crisis, **they do not feel that the single currency has played a part in limiting the impact of the crisis**¹⁶. A majority of Europeans have since early 2009 (EB71.1) disagreed with the view that the euro has mitigated the adverse effects of the crisis. This figure has grown overall, passing the 50% mark in spring 2011 (EB75).



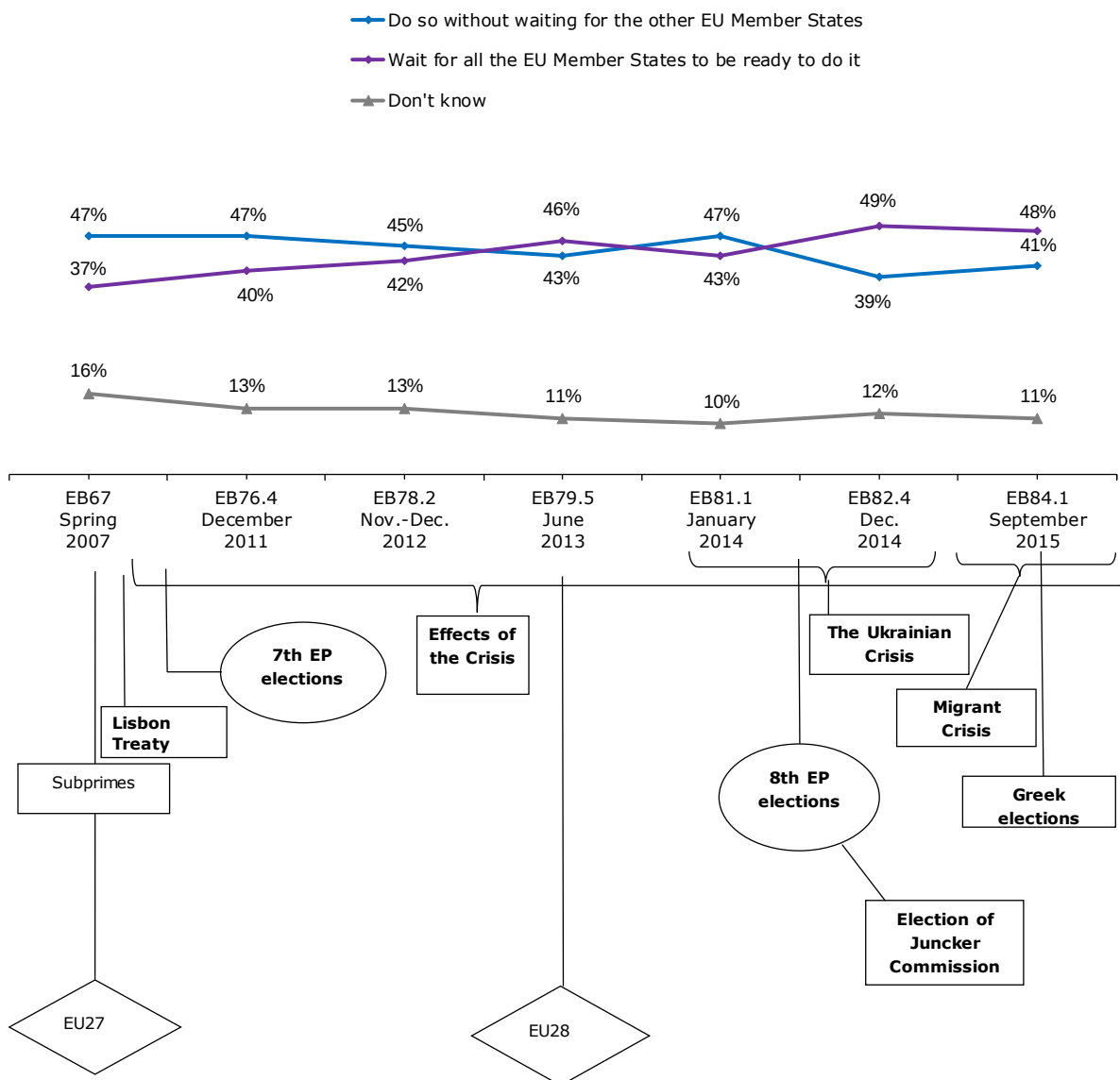
Yet in the eyes of the same Europeans, as is shown on page 15, the euro is the second most important thing in terms of what the EU represents for them personally. The euro is also one of the most important factors in European identity, coming in second place after democratic values (page 38).

¹⁶ Could you tell me to what extent do you agree or disagree with the following statement: overall the euro has mitigated the negative effects of the crisis

Europeans divided on the pace of integration

The view that Europe should wait until all Member States are ready before stepping up the development of common European policies in key areas has **gained ground** since this question was first asked in spring 2007 (EB67.2): **it has become the majority view**, rising from 37% in spring 2007 to 48% in September 2015 (EB84.1).

When it comes to EU's activities, some Member States are ready to set up common European policy in certain important areas. Do you think that they should...?



4. PERFORMANCE OF THE EUROPEAN ECONOMY

Strengthening the European Union's economic performance

Europeans have been asked, since autumn 2004, to state what initiatives they consider would strengthen the economic performance of the EU17: during the period under review (autumn 2004 to June 2013)¹⁸, they consistently placed 'improving education and professional training' at the top of their list. 60% respondents cited this item in the period up until the start of the economic crisis in 2008. From 2009 onwards – i.e. from the start of the crisis, but also with the addition of new items – it is cited less often, while remaining top of the list by some way.

Between 2004 and 2009, the second-placed initiative for improving the economic performance of the European Union was **investing in research and innovation**. From the EB72 in autumn 2009, around a year after the start of the crisis, it remains a key priority in the eyes of Europeans, even though it is cited less often. **Reducing public deficits and debt, which was added at the time the crisis became a debt crisis**, in the EB72 of spring 2010, has grown in importance and took over in second place from autumn 2010.

Making it easier to start a business is also perceived as a priority lever for improving the performance of the European economy: it occupies third place in most of the surveys reviewed.

¹⁷ Which three initiatives could most improve the performance of the European economy? (YOU MAY SELECT UP TO 3 INITIATIVES)

¹⁸ N.B. New items were gradually added to this field in 2009 and 2010, which altered the order of priority of the responses. It would nevertheless seem worthwhile considering those changes, which reflect the economic crisis, while factoring in the usual methodological precautions arising from the changes to the list of initiatives given to respondents.

Which three initiatives could most improve the performance of the European economy?

	Most cited answer	2nd most cited answer	3rd most cited answer
EB62.1 Nov. 2004	Improve education and professional training	Invest in research and innovation	Make it easier to set up a business
	63%	49%	43%
EB63 Spring 2005	Improve education and professional training	Invest in research and innovation	Make it easier to set up a business
	60%	49%	46%
EB64 Autumn 2005	Improve education and professional training	Invest in research and innovation	Make it easier to set up a business
	58%	43%	42%
EB65 Spring 2006	Improve education and professional training	Invest in research and innovation	Make it easier to set up a business
	62%	47%	43%
EB66 Autumn 2006	Improve education and professional training	Invest in research and innovation	Make it easier to set up a business
	65%	47%	43%
EB72 Autumn 2009	Improve education and professional training	Invest in research and innovation	Make it easier to set up a business
	52%	40%	34%
EB73 Spring 2010	Improve education and professional training	Make it easier to set up a business	Invest in research and innovation
	42%	33%	28%
EB74 Autumn 2010	Improve education and professional training	Reduce public deficits and debt	Make it easier to set up a business
	47%	35%	33%
EB75 Spring 2011	Improve education and professional training	Reduce public deficits and debt	Make it easier to set up a business
	48%	34%	34%
EB77 Spring 2012	Improve education and professional training	Reduce public deficits and debt	Make it easier to set up a business
	46%	38%	35%
EB78 Autumn 2012	Improve education and professional training	Reduce public deficits and debt	Make it easier to set up a business
	46%	39%	33%
EB79.5 June 2013	Improve education and professional training	Reduce public deficits and debt	Make it easier to set up a business
	47%	32%	32%

(PLEASE SELECT A MAXIMUM OF 3 INITIATIVES)

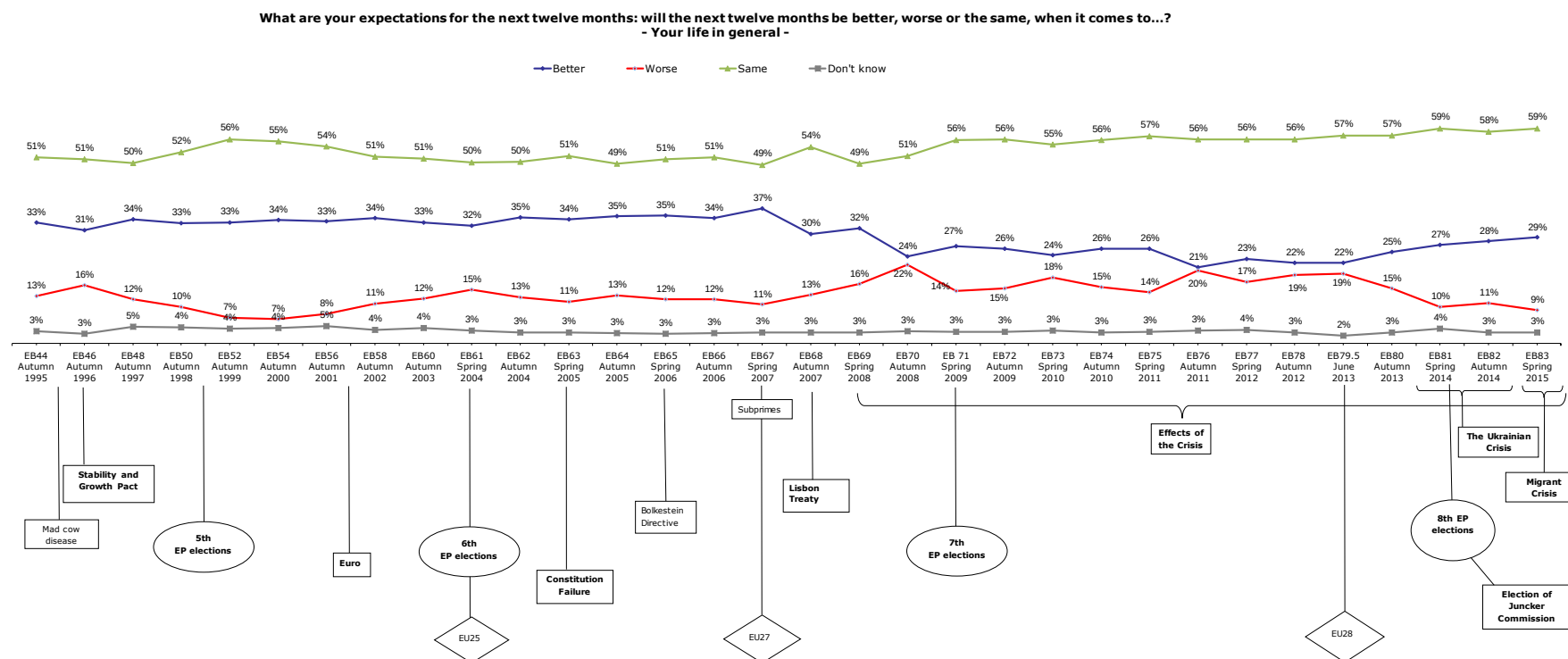
IV. THE LIVES OF EUROPEANS

THE MAIN FINDINGS

- **Europeans' expectations concerning their personal lives are dominated by the feeling** that things will remain the same over in the year to come. More respondents viewed the future positively than negatively in most of the surveys reviewed. The crisis had a clear impact on their expectations.
- In their replies concerning **'life in general'**, fewer respondents were optimistic and more became pessimistic: this trend began in autumn 2007 and took off again in autumn 2011. However, **since autumn 2011, there has been an increase in positive expectations** among the European public.
- The same is true in the case of the **personal job situation** of respondents to surveys between 1998 and 2015.
- The area worst affected by the events of recent years has been the **financial situation of households**, with pessimism concerning the coming months being greater than optimism as early as spring 2008, and markedly so as from autumn 2011. It was not until spring 2014 that optimism overtook pessimism again (EB81).

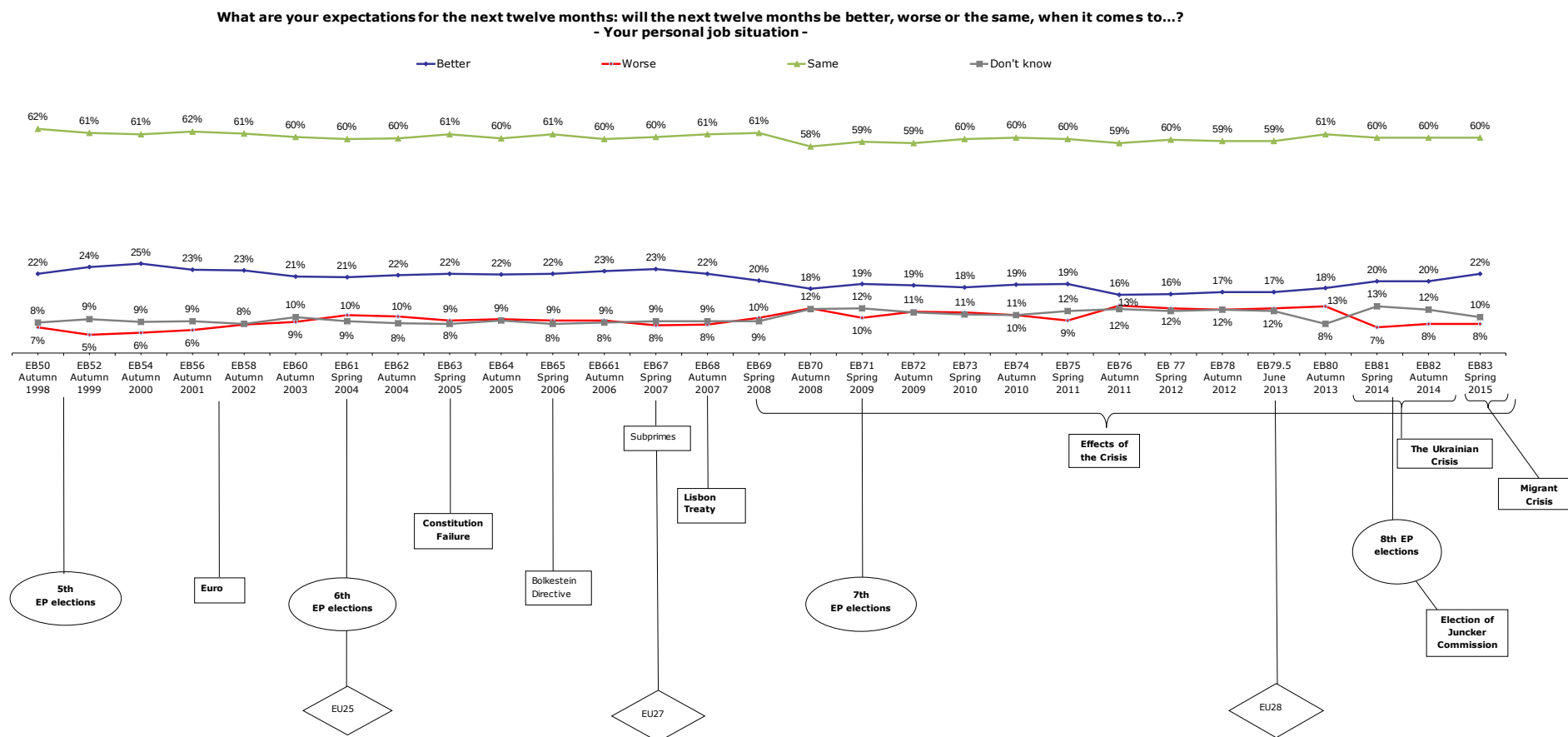
Personal outlooks have been consistent over time

Throughout the period autumn 1995 to autumn 2014, a clear majority of Europeans felt their 'life in general' was going to remain the 'same' over the next 12 months (with percentages ranging from 49% to 59% over the period as a whole)¹⁹. Optimism has always won out over pessimism, although the gap between the two shrank significantly with the start of the economic crisis (from a 27-point gap in the EB54 in autumn 2000, to a 1-point gap in the EB76 in autumn 2011). However, since autumn 2013 (EB80), the gap has again started to widen (20 points in the EB83 survey in spring 2015).

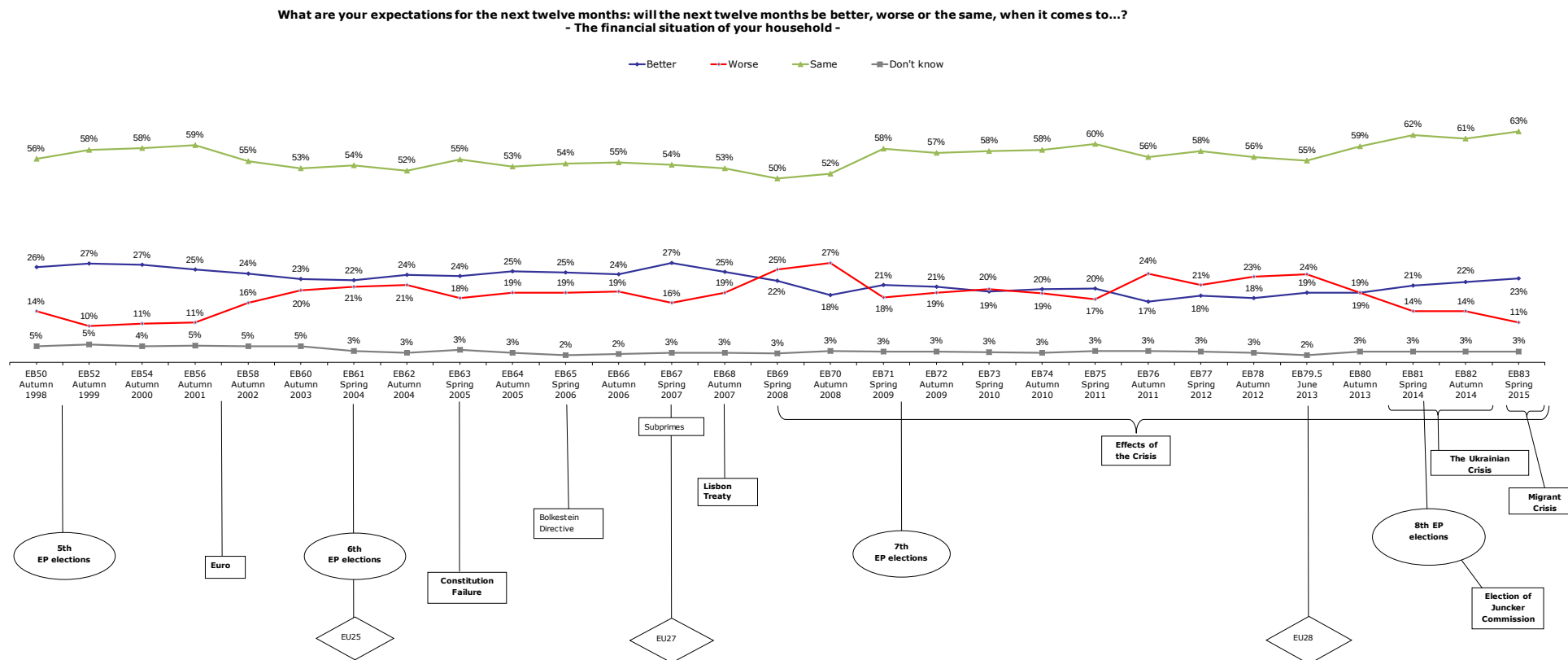


¹⁹ What are your expectations for the next twelve months: will the next twelve months be better, worse or the same when it comes to...? Your life in general / The financial situation of your household / Your personal job situation

The findings are quite similar, but even more consistent, when Europeans are asked more specifically about their career prospects: an absolute majority of Europeans, varying very little between 1998 and 2015, think that things will stay the same in the coming year. Over the whole of the period under review, the proportion of Europeans who think that their personal job situation will improve is consistently higher than the proportion expecting it to deteriorate. That gap decreases with the start of the crisis, but not as much as for 'life in general'.



The same general trends emerge when Europeans are asked how they expect the financial situation of their household to change: a majority expect their situation to remain the same in the coming year (between 50% and 60% over the period 1998 to 2012 as a whole).



CONCLUSION

The main findings to emerge from this review were as follows:

1/ A number of trends can be detected from an assessment of the changes in European public opinion over the period of more than forty years from 1973 to 2014:

- Since 1973, **the feeling that membership of the EU is a good thing** has been shared by a clear majority of Europeans.
- Moreover, since 1983 and reaching a peak in 2015, a majority of respondents have felt their **country has benefited from membership** of the EU.
- Despite some fluctuations, economic circumstances and political changes have had little impact on the feeling of **attachment to the European Union**.

2/ However, the major institutional and political developments affecting the EU and in particular successive enlargements and the eight European elections held since 1979 have frequently brought about changes in opinion:

- **Enlargements** have often proved to be occasions on which views on the EU have improved after an initial hardening of opinion. This is particularly true in the case of feelings about membership of the EU, as well as confidence in the EU and the image of the EU.
- In the case of **European elections**, this swing is less clear. However, in the aftermath of European elections, one sees an increase in the feeling among European citizens that '[their] vote counts in the EU'. There was a particularly sharp increase in that feeling after the elections in May 2014.

3/ Throughout the period under review, economic circumstances have had a determining effect on swings in European public opinion. Economic crises have triggered a serious worsening of opinions about the European Union, especially when those crises are likely to impact directly on the lives of European citizens. This is especially true of the 2008 economic crisis, which produced significant changes in the indicators reflecting support for the European Union:

- There was a **significant deterioration of the EU's image between autumn 2011 and autumn 2013**, when the economic crisis became a Member State public debt crisis; since autumn 2013, there has been a gradual increase in the number of respondents having a positive image of the EU.
- **confidence in the European Union and its institutions deteriorated** from spring 2010: confidence in the EU reached a low point in spring 2012, spring 2013, autumn 2013 and spring 2014, before recovering in autumn 2014 and in spring 2015, while remaining the minority opinion.
- The crisis also had an adverse impact on the feeling among European citizens that their **voices were not taken into account in the European Union**.

Unsurprisingly, the assessment indicators for the economic situation have also deteriorated, sometimes spectacularly, since the start of the crisis. Since autumn 2008, the economic situation in Europe has been judged increasingly 'bad' by Europeans, and this reached a low-point in autumn 2011. Since then, however, the number of respondents viewing the economic situation positively has started to increase.

- There has also been an impact on **outlook indicators**: between 2009 and 2011, the proportion of Europeans feeling that the national and European economic situations would improve over the next 12 months fell, before recovering again as from 2011.
- However, an absolute majority of Europeans has continued to believe that **their life, their personal job situation and the financial situation of their household would remain stable over the coming 12 months**.
- **The changeover to the euro does not seem to have had a major impact on European public opinion**: all that happened was national sentiments peaked very slightly immediately before the launch of the single currency (in 2002).
- On the other hand, a majority of Europeans feel that **the euro has not mitigated the negative effects of the crisis**. Nevertheless, it remains a key factor in European identity and an important symbol of what the EU means to Europeans.

4/ The economic crisis has understandably had repercussions on Europeans' opinions, especially when it comes to indicators of support for the EU, but there are several positive considerations:

- Even though some indicators show support for the EU to have hardened during the crisis, a clear majority of Europeans still **feel that there is more that unites the citizens of the Member States than divides them**: this was the case each time this question was asked, in 2008, 2009, 2013 and 2015.
- Europeans believe that **they would be better protected against the crisis if their country took coordinated measures** with the other Member States, rather than individual measures. However, this feeling decreased between September 2011 and June 2013, despite remaining the majority feeling.
- Between 2009 and 2015, **the EU was always considered by Europeans to be the player best placed to take effective action** against the effects of the financial and economic crisis.