

Exploratory study

MAJOR CHANGES IN EUROPEAN PUBLIC OPINION WITH REGARD TO THE EUROPEAN UNION

This exploratory study has been requested by the European Parliament and co-ordinated by the Directorate-General for Communication (Public Opinion Monitoring Unit).

This document does not represent the point of view 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 seen some major phases in its history and institutional and political construction, affecting some very different issues: building the institutions, the first direct elections to the European Parliament in 1979, successive enlargements, signature of various European Treaties, the opening of the frontiers between Member States, referendums and even the introduction of the single currency. However the European Union has also evolved in various often difficult economic and political contexts. It has seen the collapse of the Soviet bloc, international conflicts, several oil crises, periods of monetary instability, and since 2008, a world financial and economic crisis which has resulted in aid plans being set up for several Member States faced with considerable economic difficulties. In 2015, the European Union has not yet come out of the crisis, even though the economy is showing encouraging signs of recovery.

The Standard Eurobarometer, created in 1973 and conducted twice a year (in spring and autumn), and the special Eurobarometers have since then enabled changes in European public opinion to be measured, among ever-increasing numbers of Europeans as the various enlargements have taken place (going from 9 Member States in 1979, to 28 Member States in 2013). The latest European elections, in May 2014, marked a new phase in the construction of a political European Union in the sense that for the first time, by means of their votes, European citizens took part in the election of the President of the European Commission by the European Parliament. After these elections, the European Parliament's Public Opinion Monitoring Unit thought it was appropriate to sum up the state of European opinion across several dimensions, paying particular interest to changes in opinion since the creation of the Eurobarometer.

The dimensions examined are as follows:

- **Changes in European public opinion with regard to the European Union and its institutions**
- **Democracy in the European Union**
- **Economy of the European Union**
- **Social issues in the European Union**
- **Migration in the European Union.**

Several indicators will be analysed in each of these sections.

In this analysis, we will be attempting to review the current state of European public opinion across these major axes.

Each section starts with a box which highlights the main findings according to the variation 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 in order to reflect the population of each of the Member States.

The reader should take into account that in today's Europe of 28 Member States, the six most populated 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 when 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. Therefore, for example, we talk about EB67.1, February 2007.

I. THE EUROPEAN UNION, ITS POLICIES AND ITS INSTITUTIONS

THE MAIN FINDINGS

- The impact of the economic context on opinions about the European Union follows a complex mechanism.
- The onset of economic crises does not systematically result in a fall in opinions about the European Union (at least not initially): we see this in the case of the oil crisis of the 70s, the slowing down of the economy in the early 2000s associated with the bursting of the Internet bubble, and even in the case of the financial crisis since 2008.
- **Initially, the European Union appears in fact as a bulwark against the crisis.** The indicators of support for the EU (opinions on membership of one's country, trust in the EU, image) do not improve, but they resist.
- **Europeans seem to react more when the effects of these crises appear to be more 'specific' and likely to affect them directly.** Opinions about the European Union did indeed go down significantly in the periods of monetary instability in both the 70s and the 90s; since 2008, it was when the economic and financial crisis became a debt crisis with a big increase in unemployment in certain Member States, that we saw a rise in negative opinions about the Union (from 2010 onwards).
- Conversely, **2007** is characterised by the increase to 27 Member States (membership of Romania and Bulgaria) and also by a more favourable economic context within the European Union: it was **the year with record support for** and trust in the European Union.
- **The big institutional moments of the EU** are often the time of an improvement in positive opinions about the Union. This is especially the case with enlargements and elections to the European Parliament.
- **Before the enlargements, a certain hardening of European public opinion with regard to the EU is often recorded,** probably because European citizens are worried about the consequences of membership of these new countries. This was the case in particular in autumn 2003 (prior to the enlargement from 15 to 25 Member States, in 2004). By contrast, **the surveys which follow enlargements more often than not record noticeable improvements in opinions,** due to the enthusiasm of the new entrants, but also to a form of acceptance of this new stage by other Europeans.

- **The European Parliament elections** also see an improvement in the indicators of support for the European Union: thus we note a substantial rise in these indicators after the 2004 election, but less clear after the elections in 2009 and 2014.
- **2005, which was characterised by the debates surrounding ratification of the Constitutional Treaty, is an exception in these great institutional moments** since opinions had a tendency to harden: the perception of membership and of the EU's image therefore deteriorated. However, trust in the EU remained stable.
- **The impact of the single currency** on the major indicators of opinion about the European Union is not clear either:
 - On the eve of the introduction of the single currency in the first 11 countries of the euro zone, the indicators tended to improve (whether in terms of trust in the EU or the judgment about the country's membership).
 - In spring 2002, after the introduction of the euro, the EU's image improved, opinions about the country's membership resisted, but trust in the EU fell.
- Across the board, we see for the periods under review – since autumn 1997 in the case of trust in the EU; spring 2000 in the case of the EU's image – a marked deterioration in both of these key indicators of support for the European Union. Europeans tend to attribute economic weaknesses to it, more than associating it with its underlying themes such as democracy and world influence. Trust in the institutions is also greatly damaged in the context of an economic crisis.
- However, for all these indicators, the latest measurements (spring and/or autumn 2014) seem to show some improvement.
- **Trust in the EU is greater than that in national institutions (Government and Parliament)**, but the difference has tended to reduce since the onset of the crisis.
- Nevertheless, Europeans continue over time and in spite of this context of a crisis to **associate the European Union with positive issues**.

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

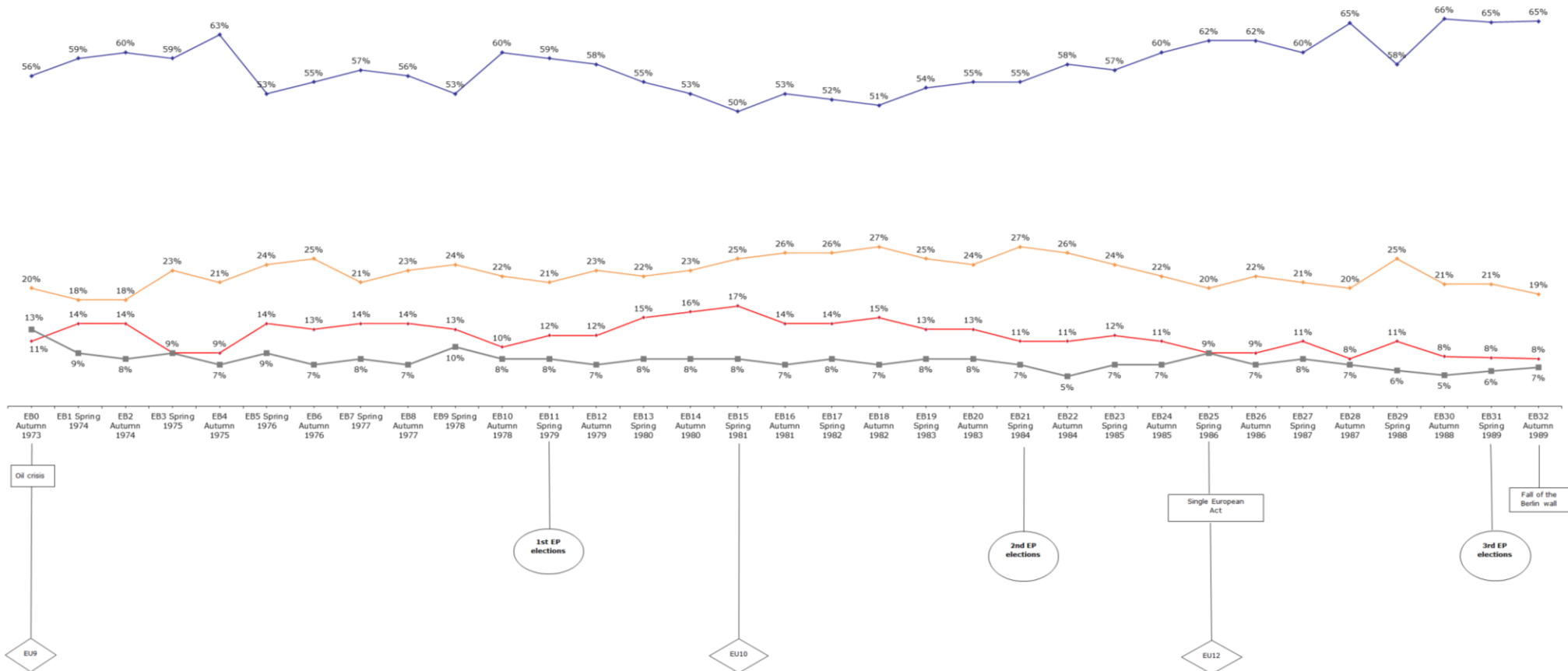
Membership of the European Union: above all a good thing in the eyes of Europeans from 1973 to 2014

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 – 2014). Similarly, 'neutral' opinions, i.e. deeming that one's country's membership of the Union is 'neither a good, nor a bad thing', have still remained greater than negative opinions (namely 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...?

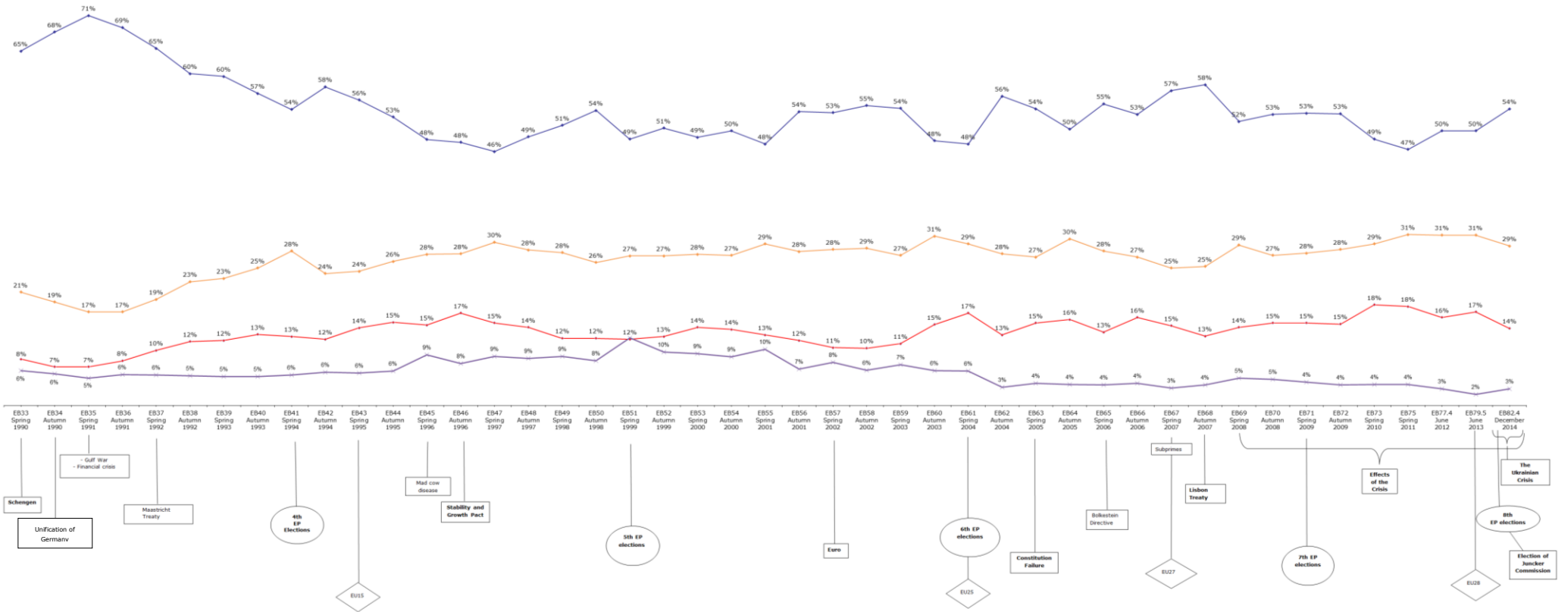
Generally speaking, do you think that (OUR COUNTRY)'s membership of the European Union is...?

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



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

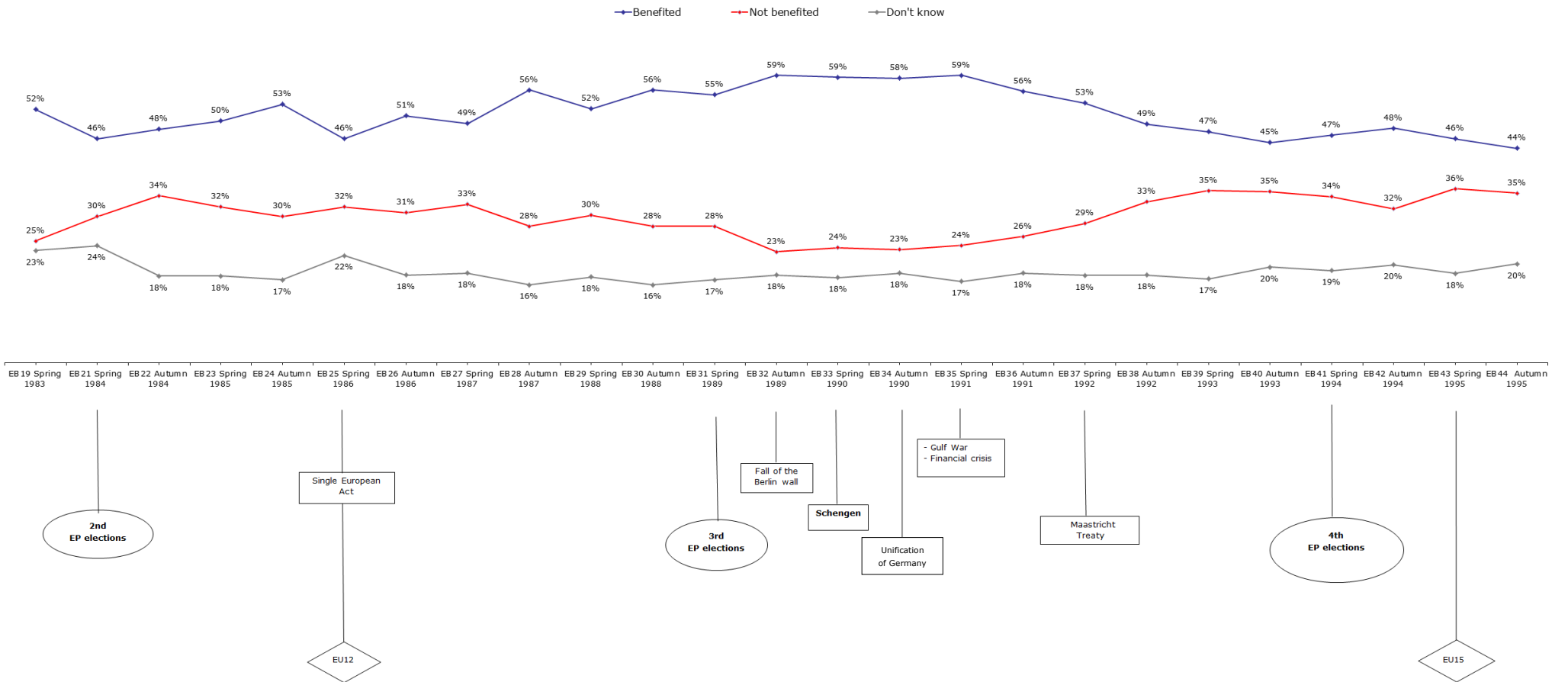


Benefits of membership of the European Union: always perceived by the majority of EU citizens over the period

The feeling that one's country has benefitted from being a member of the European Union³ has remained in the majority throughout the period under review, from spring 1983 to June 2013. 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%).

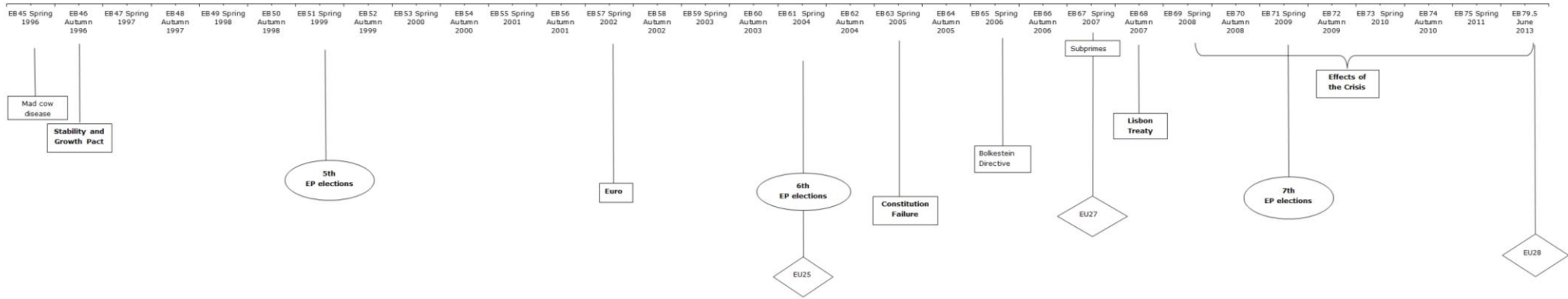
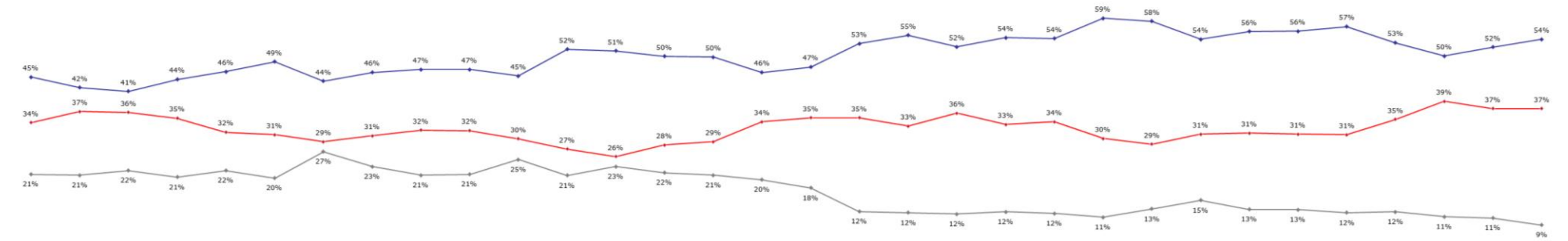
³ All things considered, do you think that (OUR COUNTRY) has or has not benefited from EU membership?

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



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

Benefited Not benefited Don't know

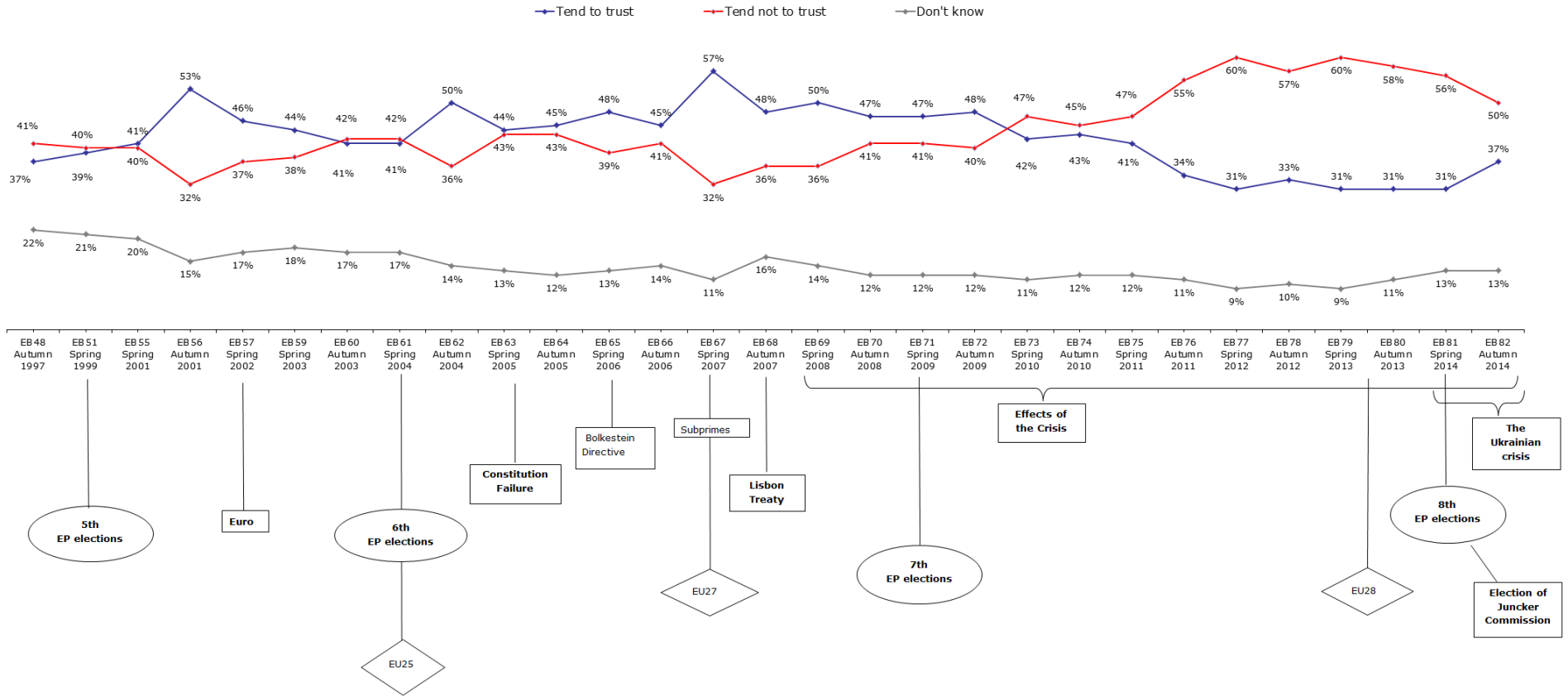


2. TRUST IN THE EUROPEAN UNION

Europeans' faith in the European Union was tested between autumn 1997 and autumn 2014. 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, though still remained in the minority (37% against 50% 'tend not to trust').

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



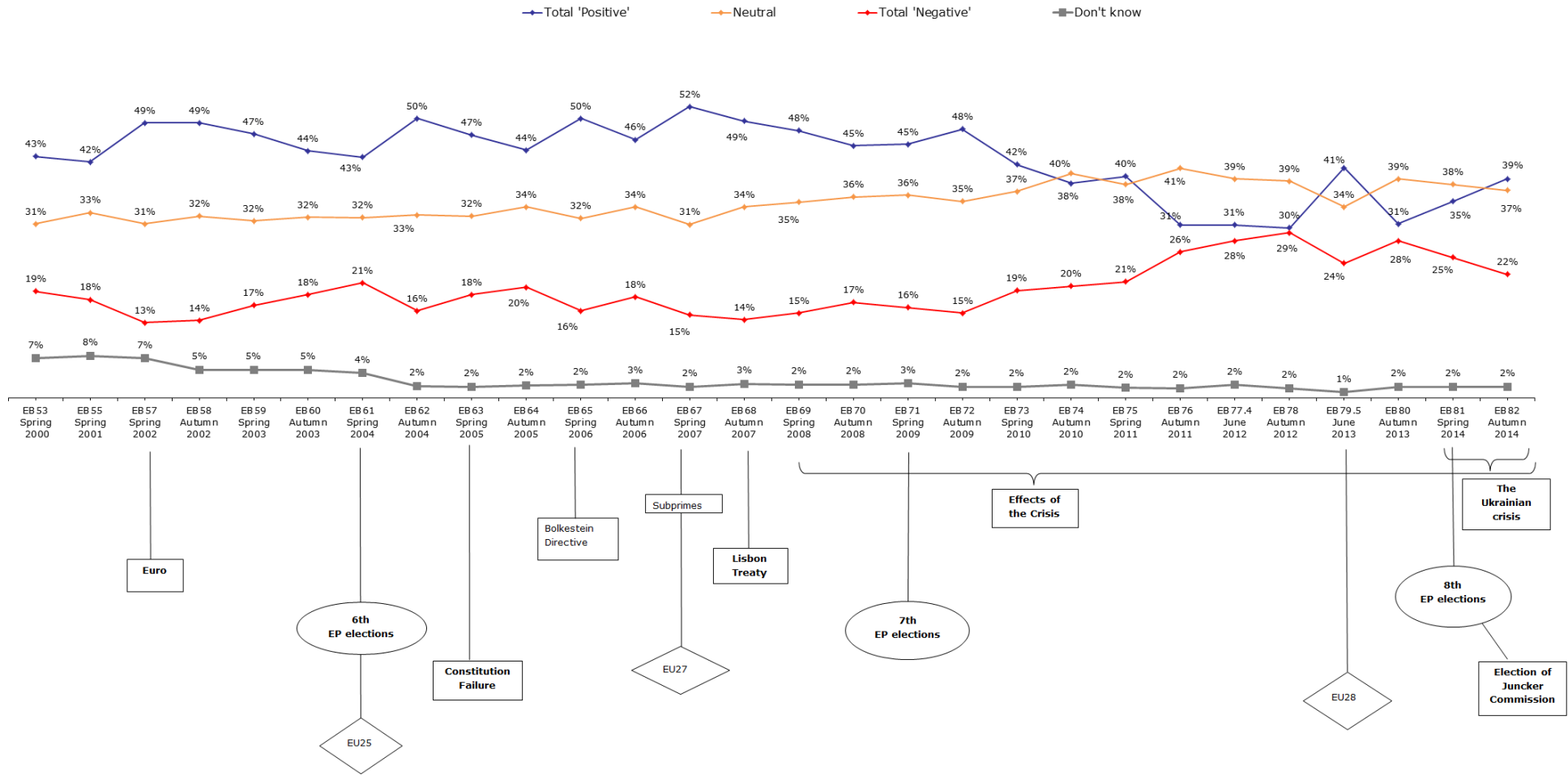
3. THE IMAGE OF THE EUROPEAN UNION AND WHAT IT MEANS TO EUROPEANS

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 at below 42% and have been surpassed several times by neutral opinions (people saying that they have a 'neutral' image). 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 ?

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

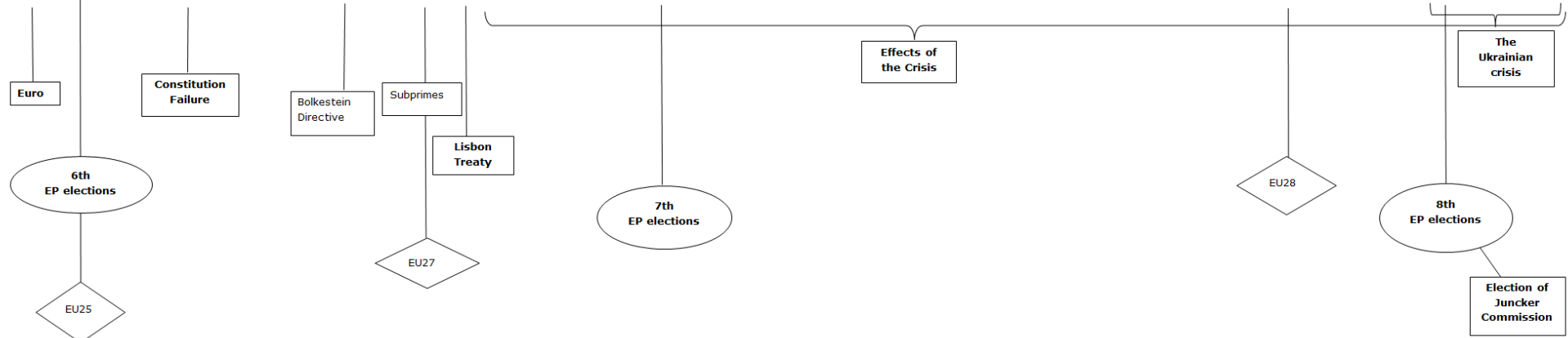
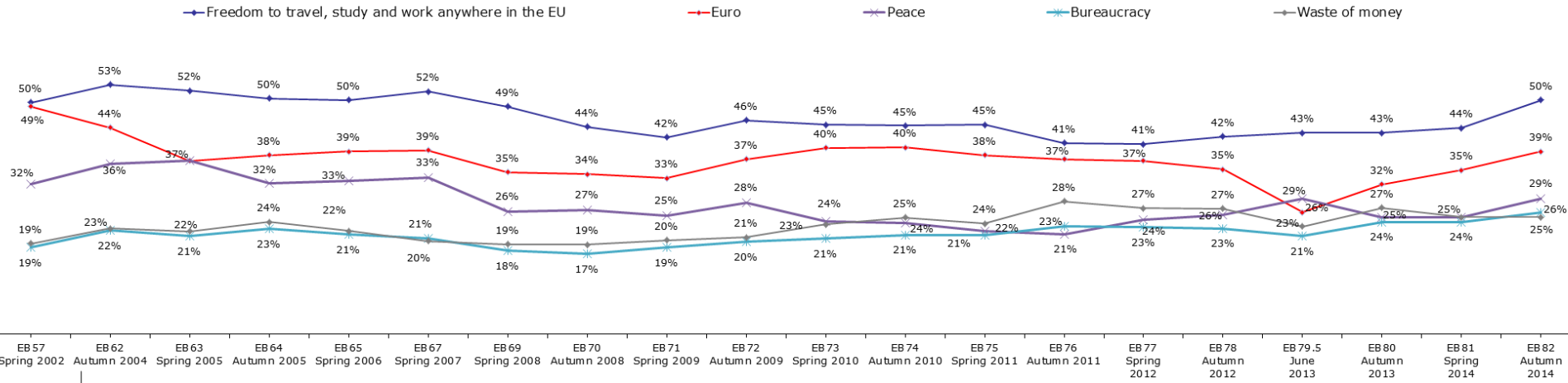


What the European Union means: a trio of positive dimensions at the head of the associations

Over the whole of the period when the question was asked, i.e. from spring 2002 (EB57) to autumn 2014 (EB82), **'freedom to travel, study and work anywhere in the EU'** is the first issue that Europeans associate with the European Union. **The euro** is in second place throughout the period under review, with the exception of the survey in June 2013 (EB79.5) when this item was briefly overtaken by **peace**. This last dimension is in third place in most of the surveys analysed: the items most frequently associated with the EU are positive issues.

However, two negative items are found in fourth and fifth places: **bureaucracy** and a **waste of money**. They have been going up slightly since 2002.

What does the EU mean to you personally? ?



(SEVERAL POSSIBLE RESPONSES)

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.

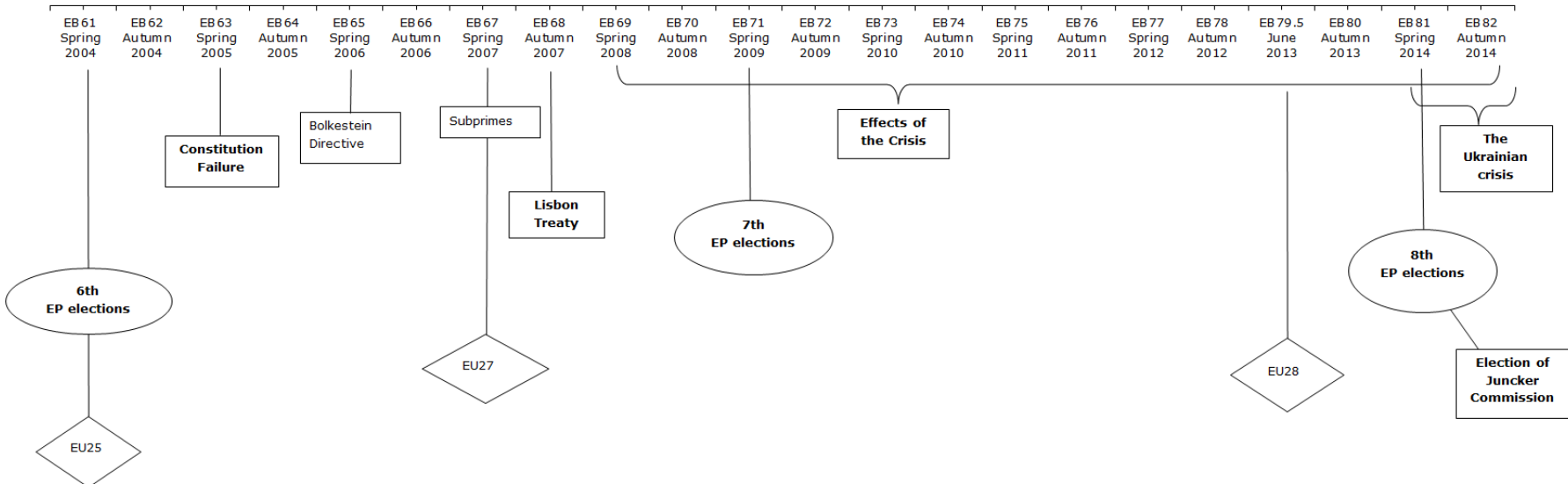
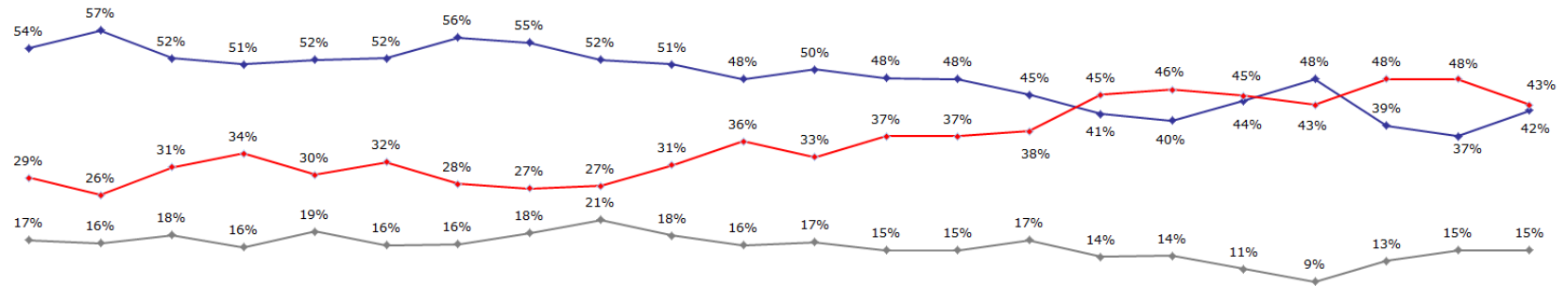
Europeans' faith in the European institutions fell significantly between autumn 2004 (EB62)⁵ and autumn 2014 (EB82). Whilst the majority of Europeans trusted most of the institutions, the trend lines tended to go the other way from autumn 2011 (EB76).

Fairly broadly positive in autumn 2004 (57% in EB62 in autumn 2004), **trust in the Parliament gradually fell until it was in the minority** from autumn 2011 onwards (45% against 41% trust in EB76). It should be remembered that this survey wave of autumn 2011 shows a strong deterioration in all the indicators. In the June 2013 survey, trust in the EP briefly went back into the majority (48% against 43%). Finally, in autumn 2014, trust in the European Parliament is at virtually the same level as mistrust (42% against 43%).

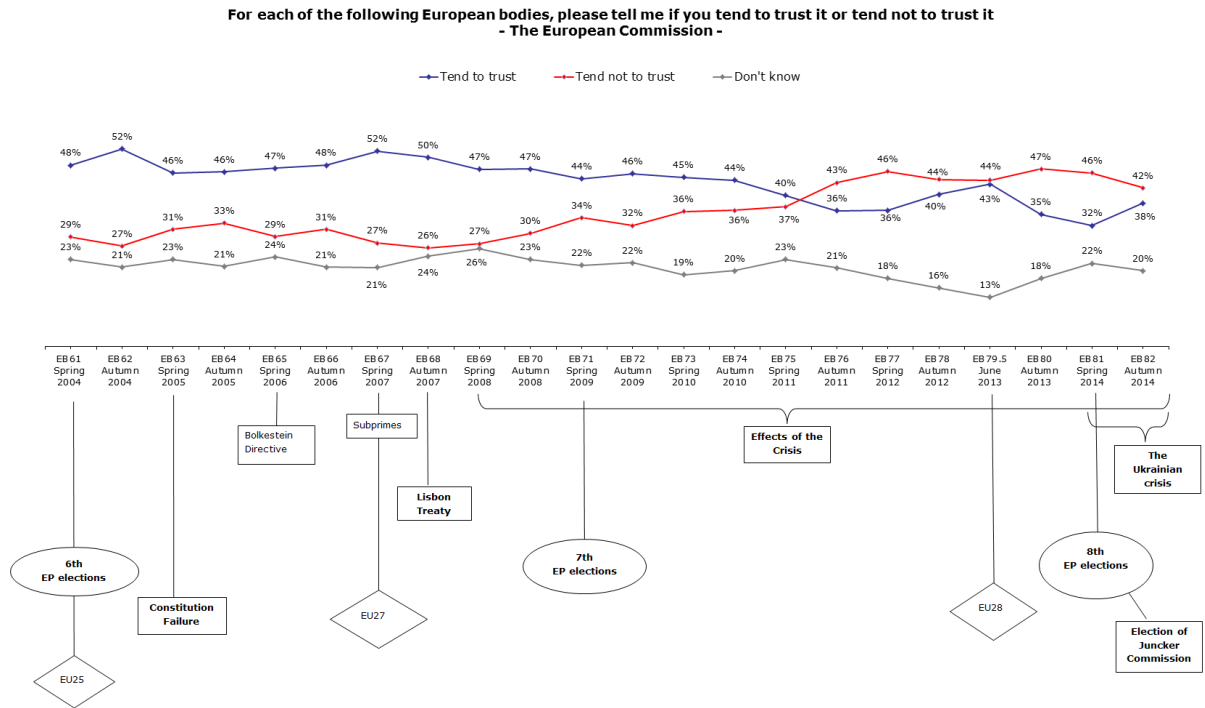
⁵ For each of the following European institutions, could you tell me whether on the whole you do or do not trust it.

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



The evolution is similar in the case of **trust in the European Commission**. The level of trust gradually fell until it was in the minority from autumn 2011 onwards (43% in EB76, against 36% trust). Since then, mistrust has remained dominant, although trust is increasing in the latest survey.

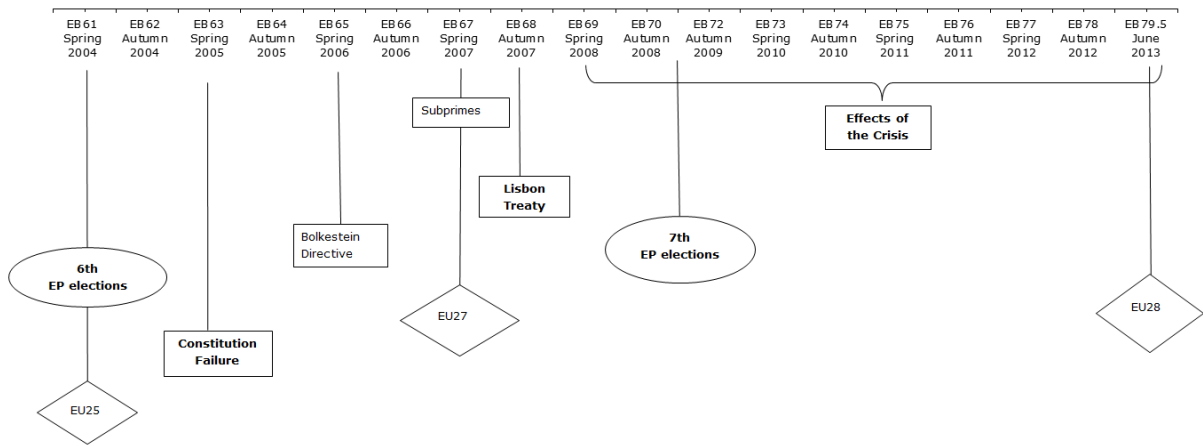
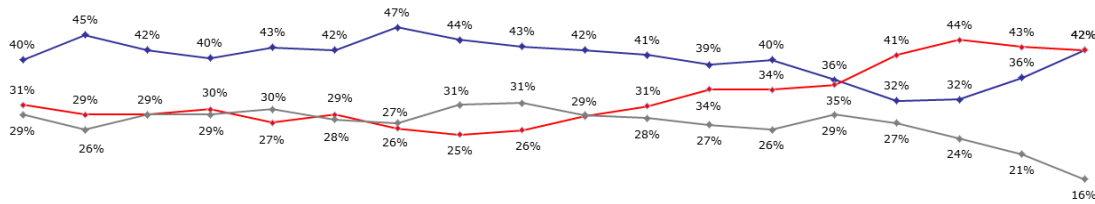


Trust in the Council of the European Union has also gone down to be in the minority from autumn 2011 onwards (EB76). Having said that, this trust has recovered since autumn 2012, to reach 42% in the last measurement in June 2013 (same level as mistrust). The no response rate is high, but has continued to fall since autumn 2011 (16% in EB79.5 in June 2013).

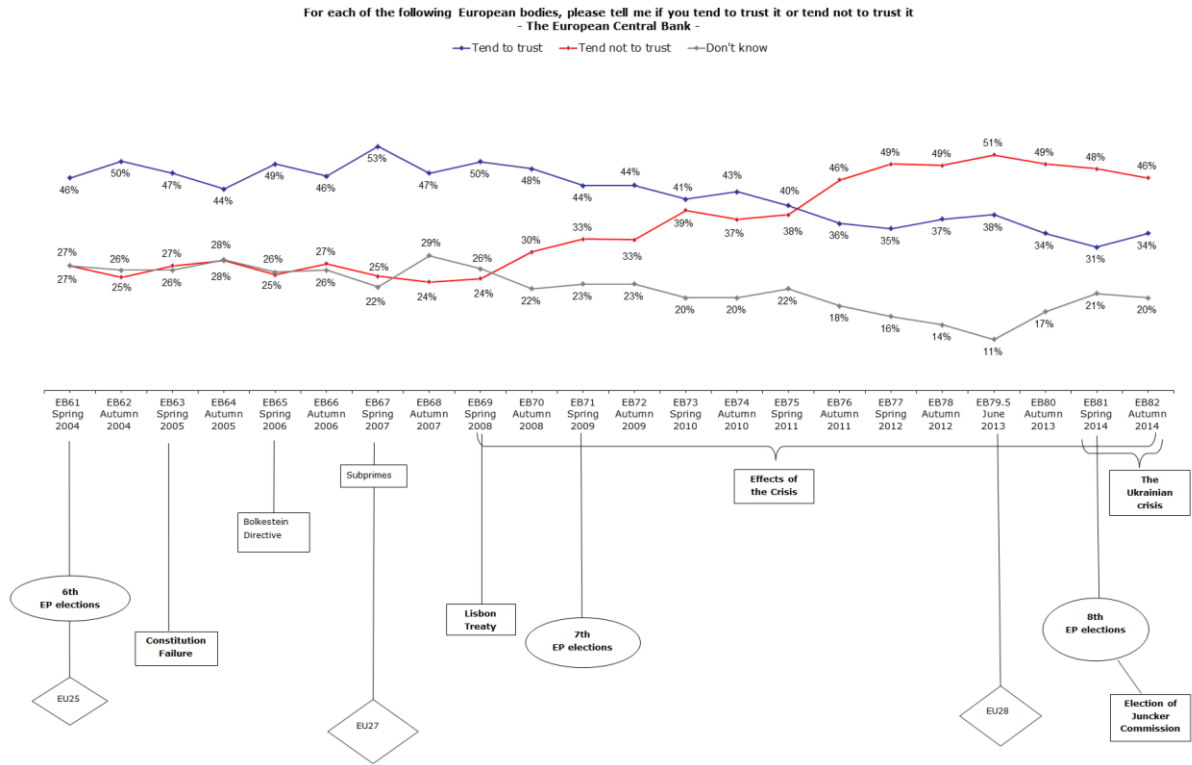
For each of the following European bodies, please tell me if you tend to trust it or tend not to trust it

- The Council of the European Union -

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

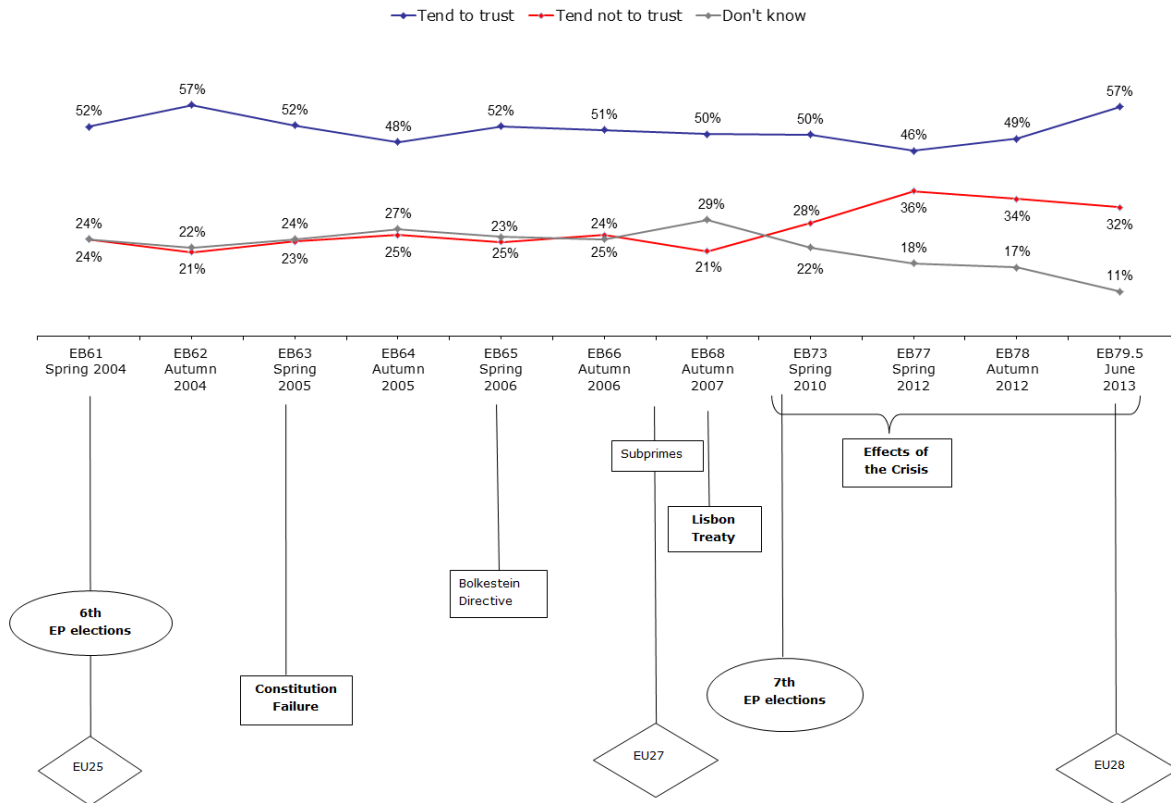


Trust in the European Central Bank has tended to follow the same changes. This is the institution in which distrust is the highest, in spite of a slight fall since autumn 2013 (EB80).



The Court of Justice of the European Union stands out from the other institutions: trust has remained broadly in the majority throughout the period under review (between autumn 2004 (EB62) and June 2013 (EB79.5)). However, mistrust increased significantly from spring 2010 (EB73), reaching 36% in spring 2012 (EB77). It has fallen slightly since but still remains above 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. AWARENESS OF HOW THE EUROPEAN INSTITUTIONS OPERATE

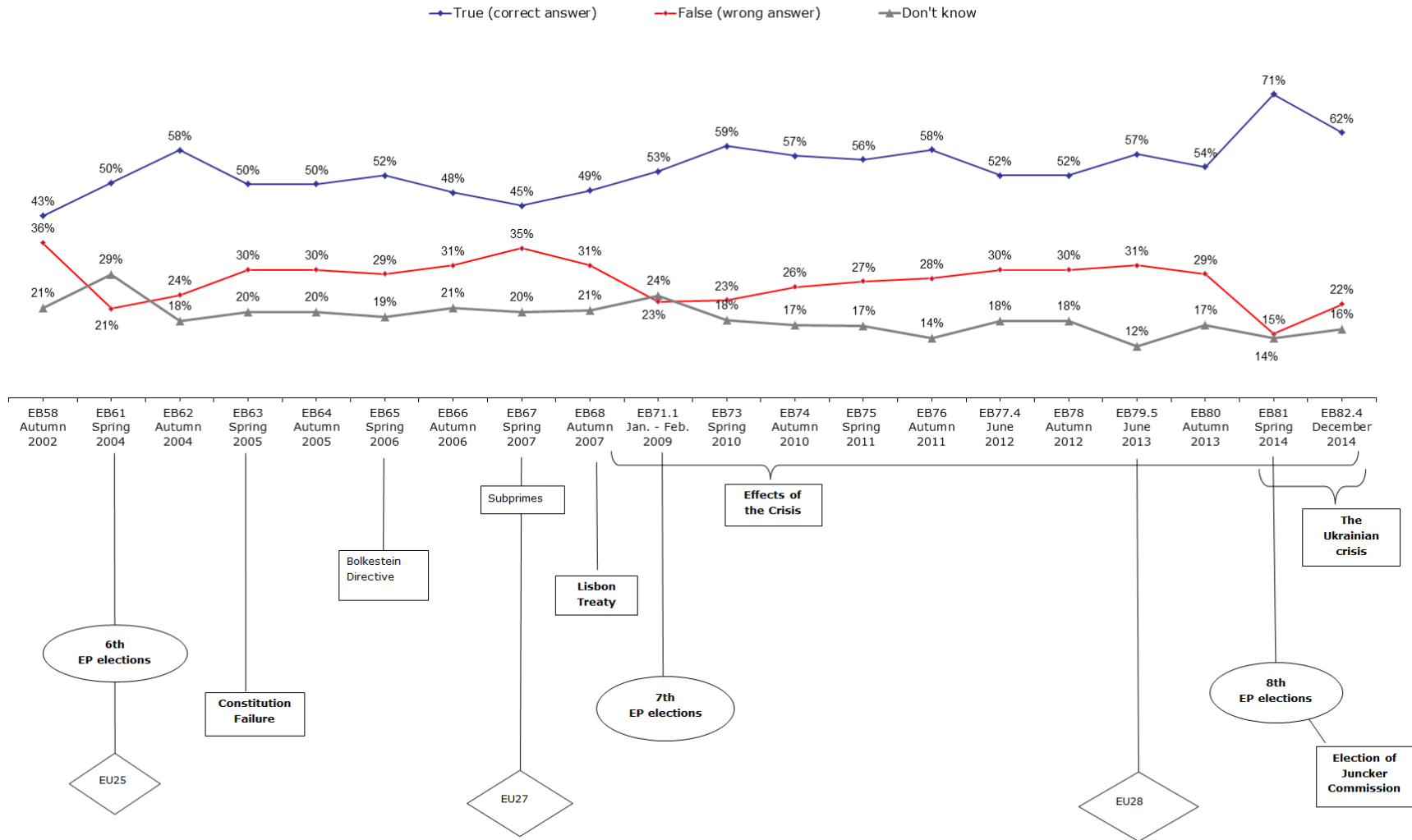
The majority of Europeans appear to be aware of some of the major operating mechanisms of the EU.

When asked using a quiz question (true/false)⁶ about their knowledge of the operation of the European institutions, Europeans show a relatively high level of information since the majority chose the correct response across all the hypotheses which were tested.

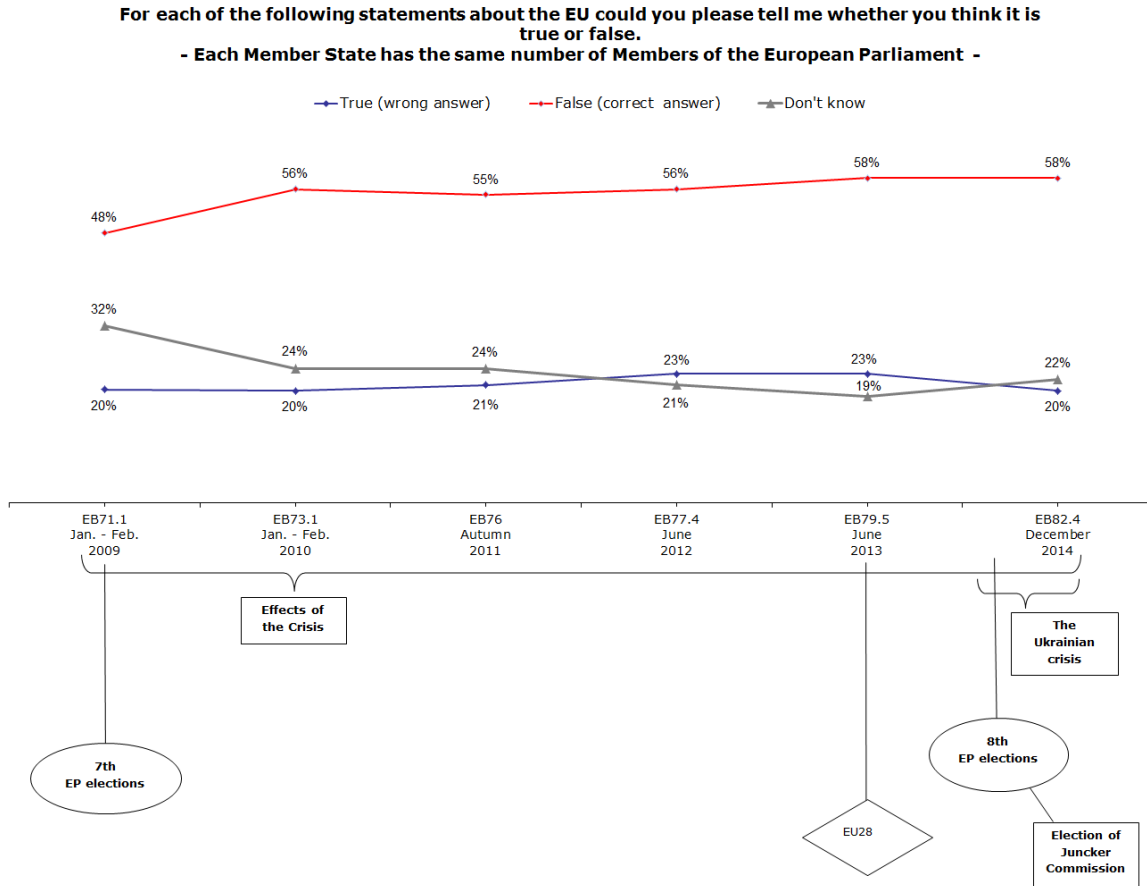
Awareness of the principle of the election of Members of the European Parliament by direct universal suffrage in each Member State has been in the majority since autumn 2002 **(EB58)**. **This awareness undergoes positive change at each European election. This rise is especially marked in the case of the latest elections in May 2014 (71%, +17 percentage points), before falling back to 62% at the time of the last survey, carried out in December 2014, its second best level.**

⁶ For each of the following statements about the EU, could you tell me whether you think it is true or false.

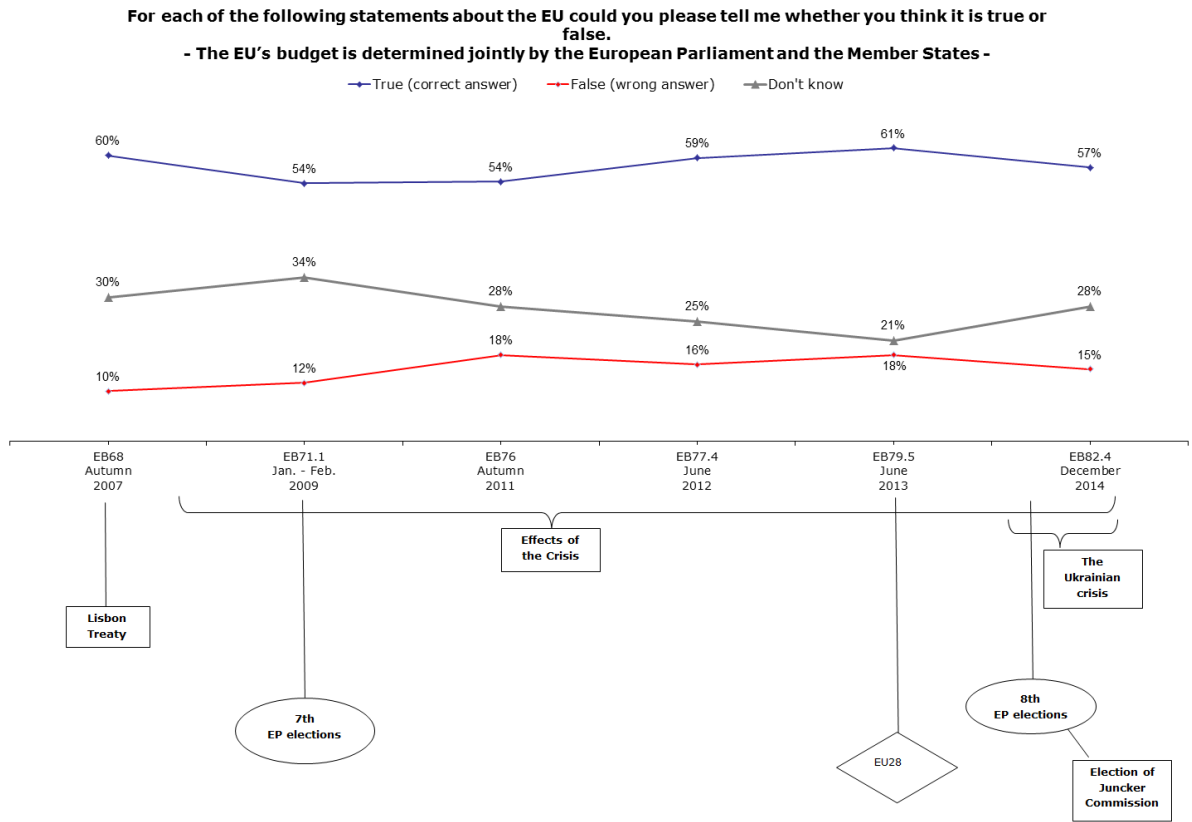
For each of the following statements about the EU could you please tell me whether you think it is true or false.
 - The members of the European Parliament are directly elected by the citizens of each Member State -



The majority of Europeans know that Member States do not have the same number of representatives in the European Parliament. Following a slight improvement between January-February 2009 (EB71.1) and January-February 2010 (EB73.1) (+8 points, from 48% to 56%), the level of information among Europeans about the number of representatives of each Member State within the European Parliament has remained more or less stable.

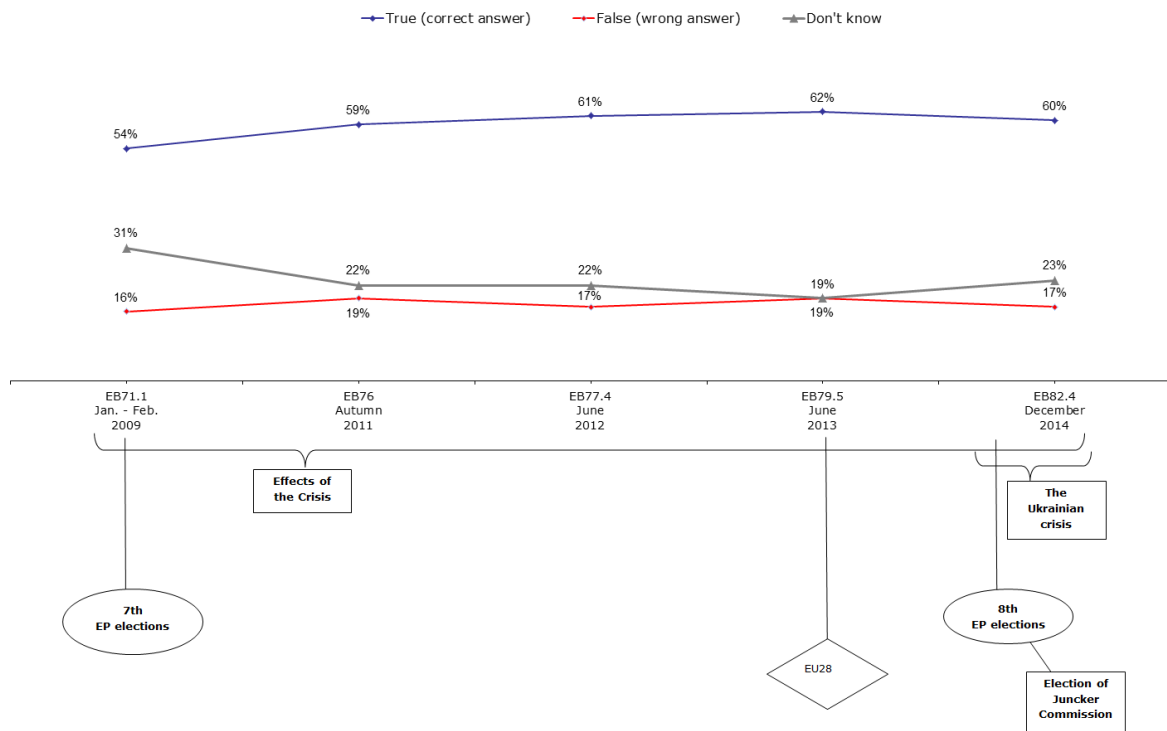


In the case of the principle of joint agreement between the European Parliament and the Member States for determining the EU budget, once again the correct responses clearly prevail **throughout the period under review, though they do not increase.**



Awareness of the principle of agreement between the European Parliament and the Member States on European directives and regulations is also broadly in the majority: **it improved slightly 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 -

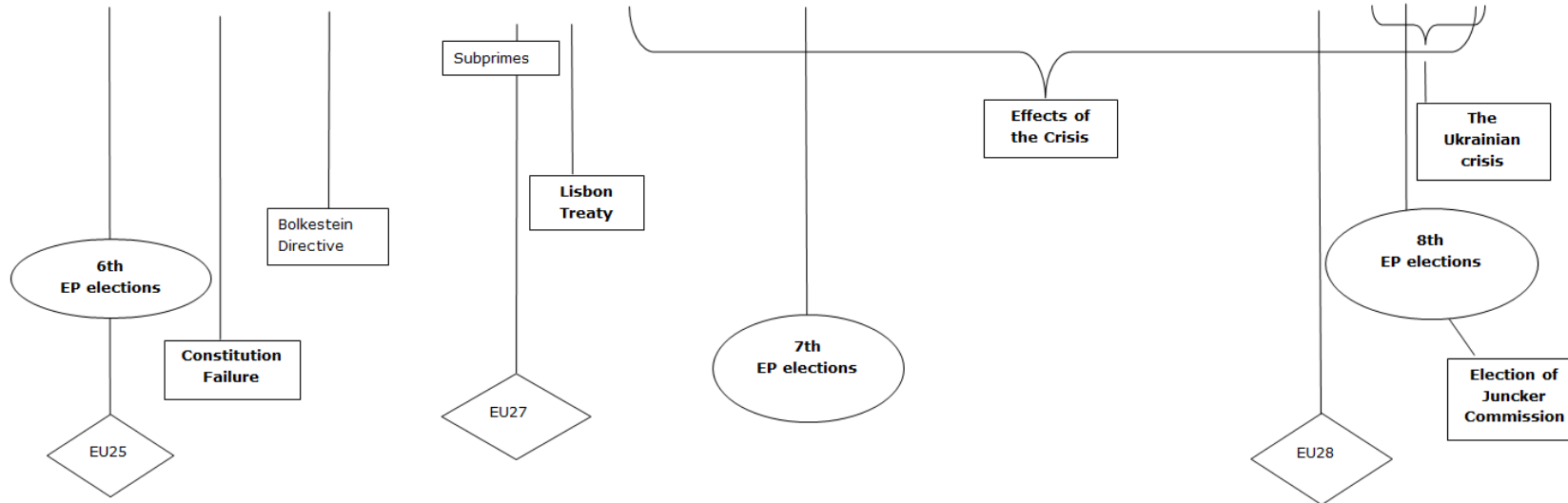
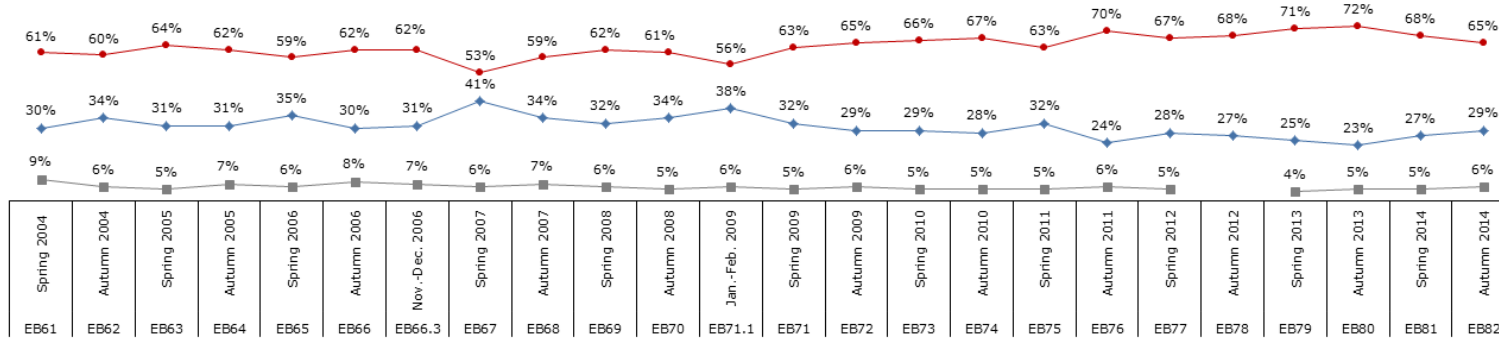


6. TRUST IN NATIONAL INSTITUTIONS

A large majority of Europeans do not trust their national government, and trust fell overall between 2004 and 2014. Having reached its lowest level in autumn 2013 (23% in EB80), this trust in the national government has improved slightly since, reaching 29% in the autumn 2014 survey.

For each of the following media and institutions, please tell me if you tend to trust it or tend not to trust it.
 The (NATIONALITY) Government - % EU

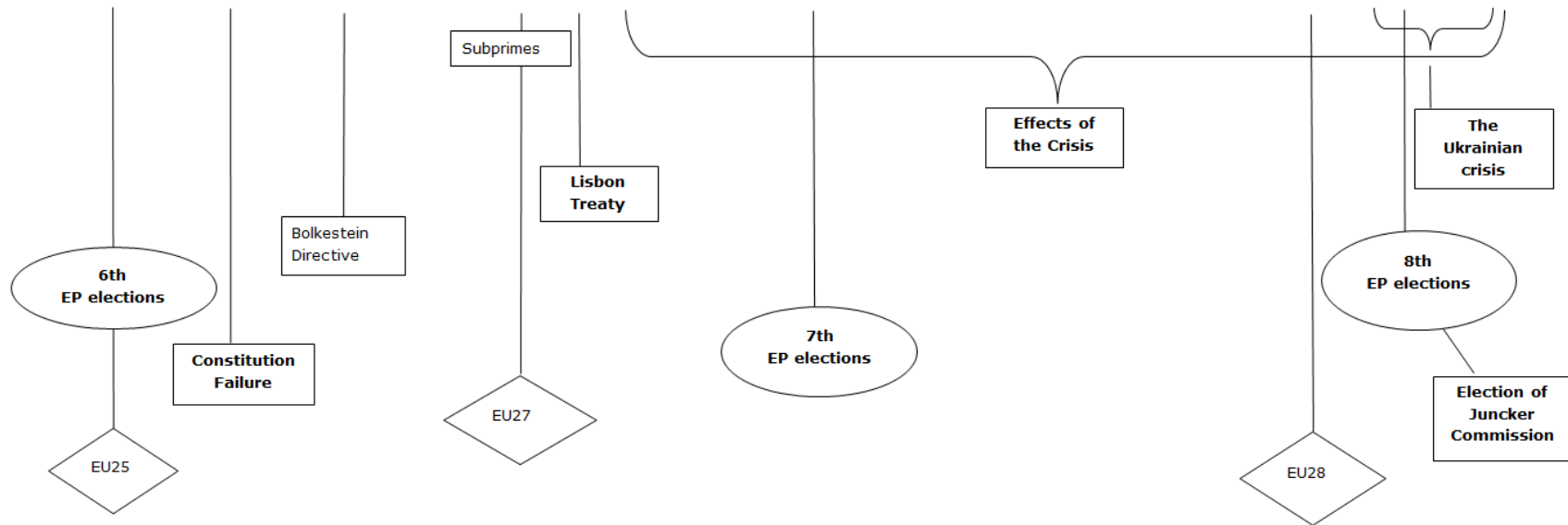
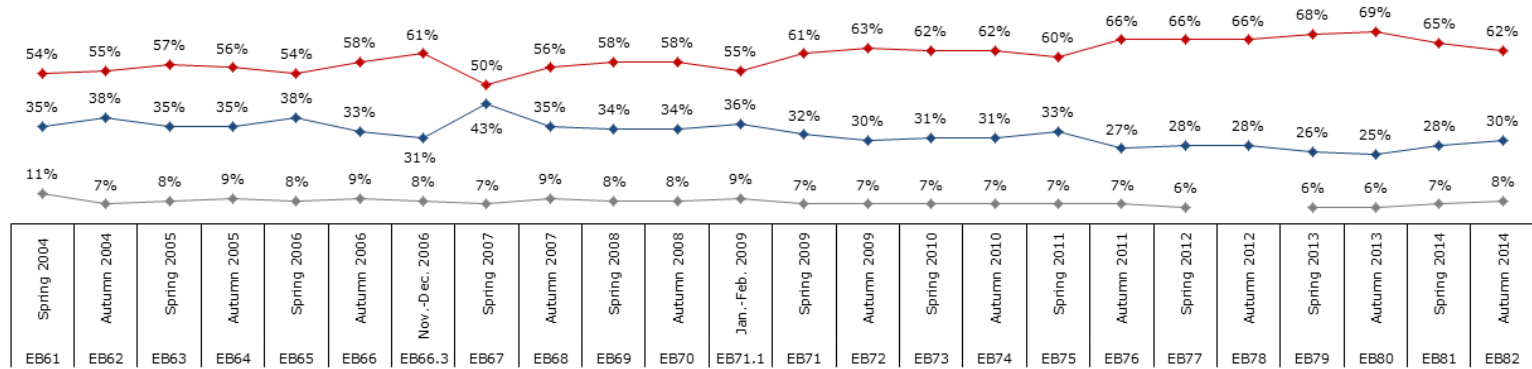
— Tend to trust — Tend not to trust — Don't know



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 overall between 2004 and 2014, reaching its lowest level in autumn 2013 (25% in EB80). In each of the surveys analysed, trust in the national Parliament is very slightly higher than 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.
The (NATIONALITY) Parliament - % EU

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



II. DEMOCRACY IN THE EUROPEAN UNION

THE MAIN FINDINGS

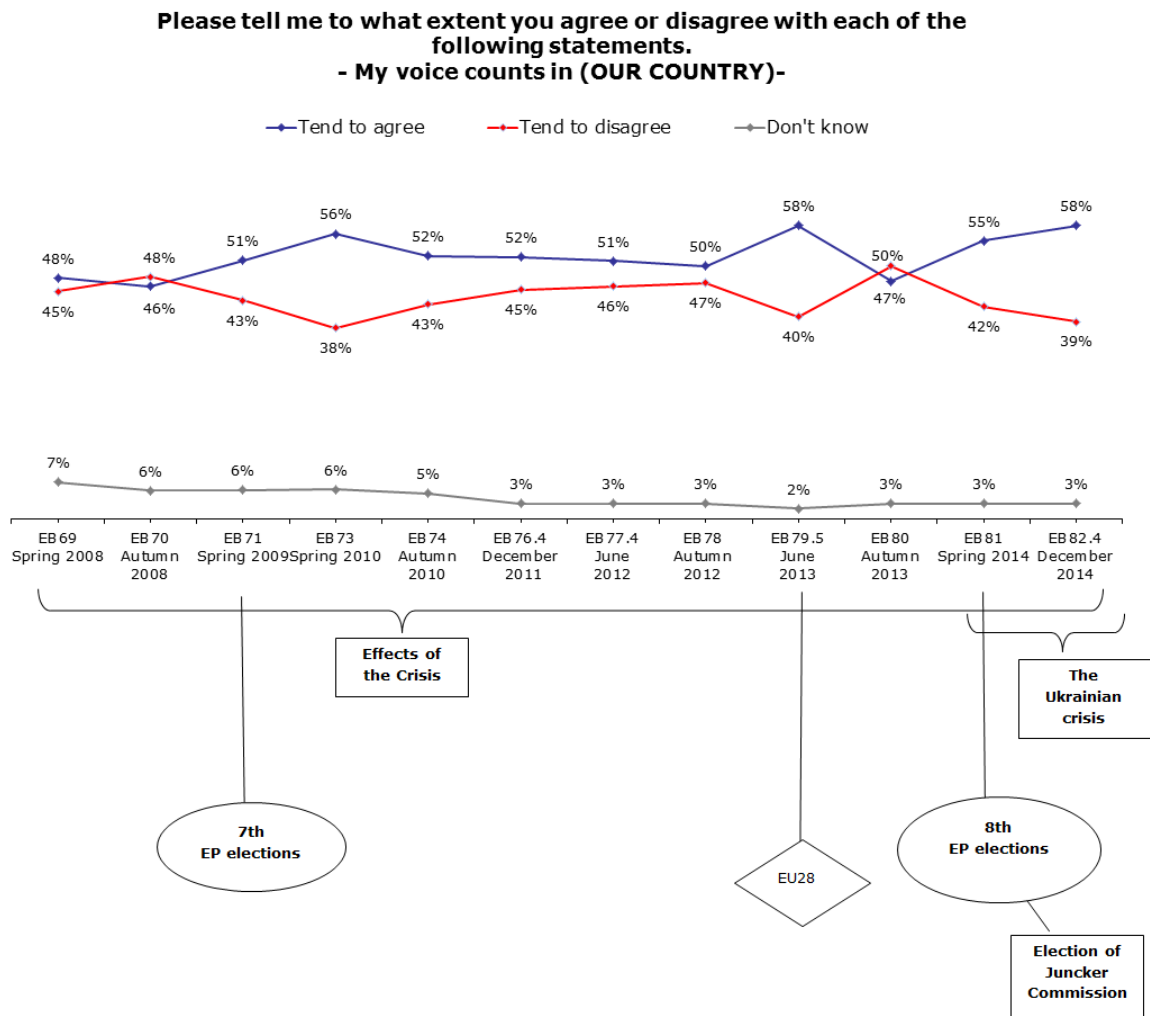
- **In 2002, one European in five believed that his voice counted in the EU. In 2014, it is two in five.**
- **Over the same period, the proportion of those who believe that their voice does not count went from two thirds in 2002 to just over half in 2014.**
- In most of the surveys analysed, **the majority of European citizens believe that their voice counts in their country. Slightly more again (more than six out of ten Europeans) believe that their country's voice counts in the EU**, but the number of people who think the opposite has increased since 2002.
- **The feeling of European citizenship has remained stable and in the majority**, without being affected by the European Union's own issues and changes in the economic and political context. There were no significant changes in this indicator between 1992 and 2013. National identity is stronger in the mid-90s, on the eve of the introduction of the euro, or even in spring 2010 in the midst of the debt crisis of several Member States. The feeling of European citizenship increased following the adoption of the euro and even in the midst of the economic crisis, in particular in 2012.
- **Attachment to the European Union splits public opinion in two** over the period under review: it increases in the slightly contentious period of debates on the ratification of the Constitutional Treaty which seems to have had the effect of making the European Union more concrete in the eyes of Europeans. The 2007 enlargement also had a positive effect on this feeling. It then drops off, as a result of the financial and debt crisis of the Member States, which also affects all the other indicators.

- 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 believe that their voice counts in their own country

Tested between spring 2008 (EB69) and the end of 2014 (EB82.4), the feeling among Europeans that their voice counts in their own country⁷ is prevailing apart from two exceptions: in autumn 2008 (48% 'do not agree', against 46% 'agree') and autumn 2013 (50% against 47%), a small majority of Europeans believed that their voice did not count in their own country.



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

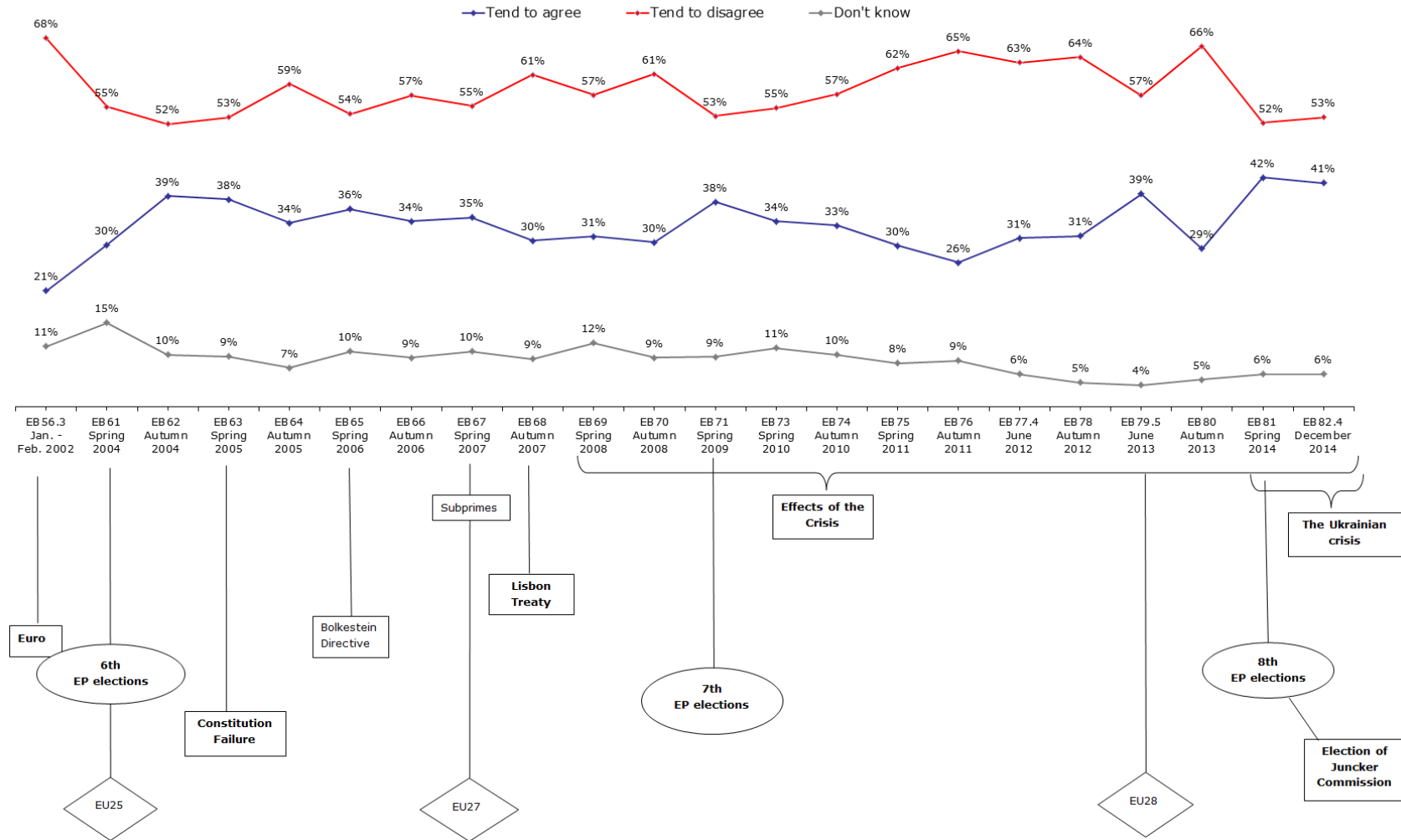
The majority of Europeans believe that their voice does not count in the EU.

The feeling of Europeans that their voice counts in the European Union⁸, tested between the beginning of 2002 (EB56.3 January-February 2002) and the end of 2014 (EB82.4, December 2014) is in the minority over the whole of the period. As a trend, this feeling has improved since 2002, going from 21% in EB56.3 in 2002, to 41% in December 2014 (EB82.4). **This opinion saw significant increases in the surveys conducted after the 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 voice counts 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.

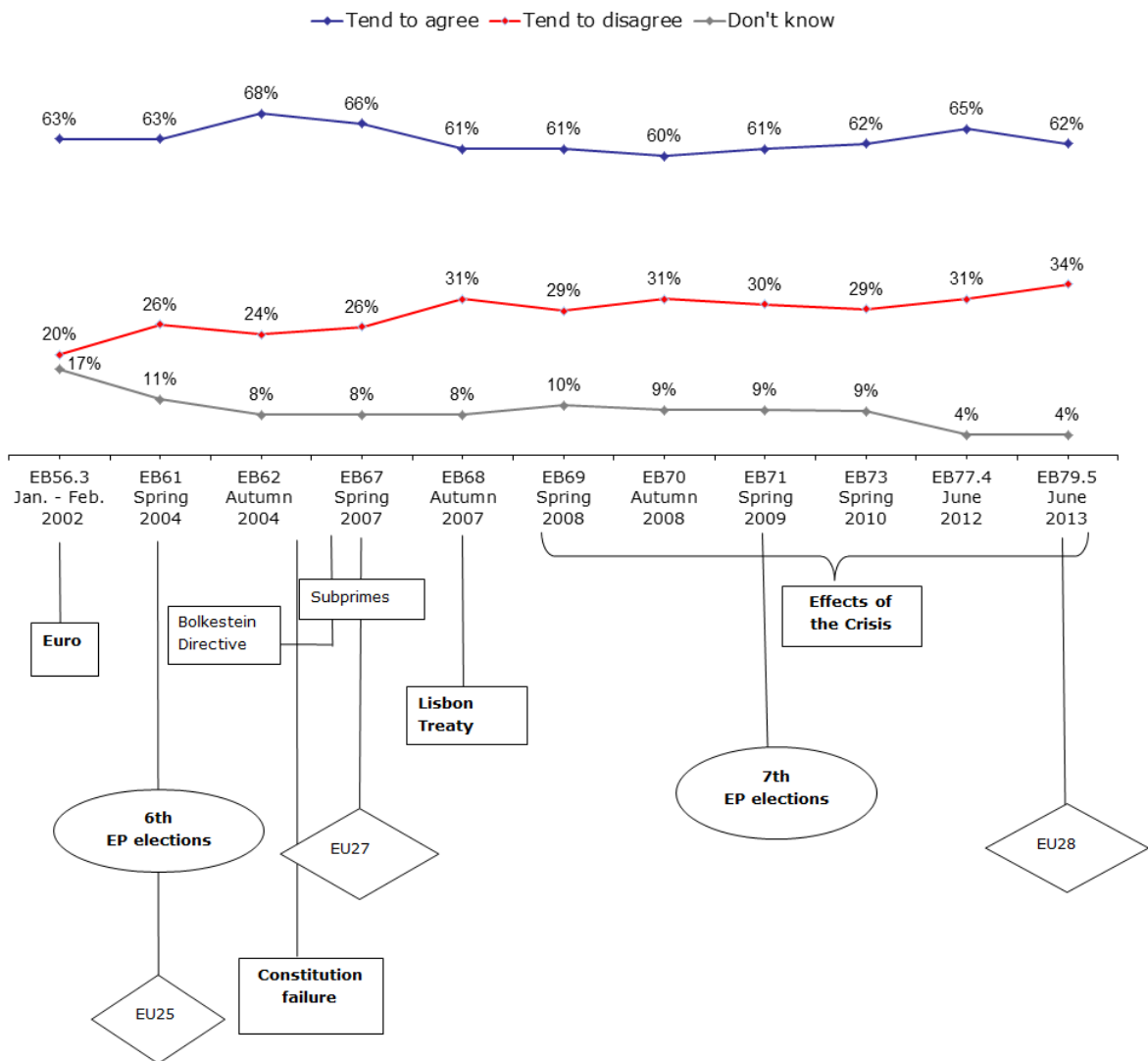
Please tell me to what extent you agree or disagree with each of the following statements.
 - My voice counts in the EU -



More than six out of ten Europeans believe that their vote counts in the EU

The feeling held by Europeans that their country’s voice counts in the European Union¹⁰ is clearly in the majority over the period from the start of 2002 (EB56.3) to June 2013 (EB79.5), with minor changes: it remains at or above 60% the whole time. However, the proportion of people who do not agree with this opinion is tending to increase, going from 20% in EB56.3 in January-February 2002, to 34% in June 2013 (EB79.5).

**Please tell me to what extent you agree or disagree with each of the following statements?
- (OUR COUNTRY)’s voice counts in the EU-**

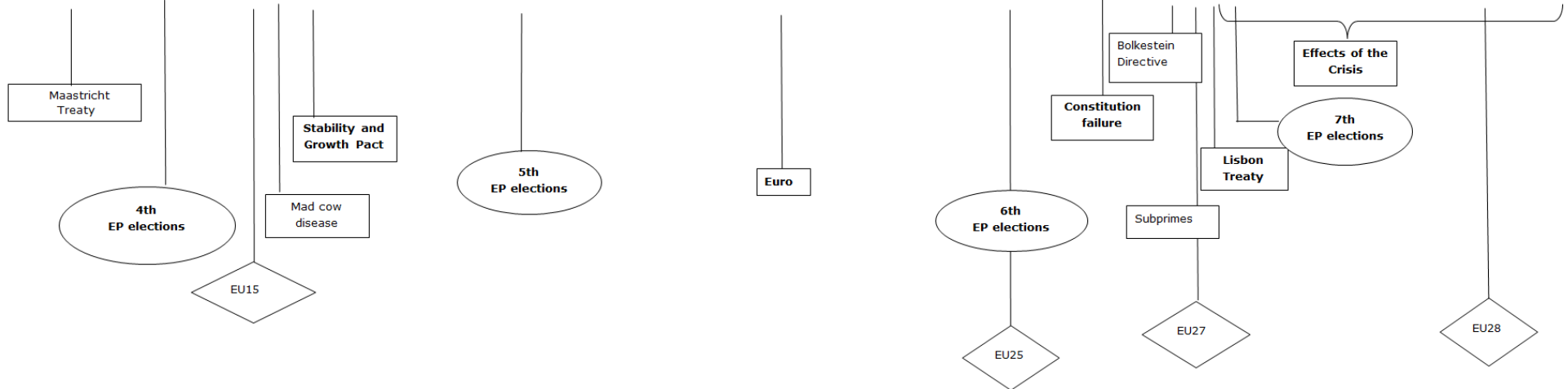
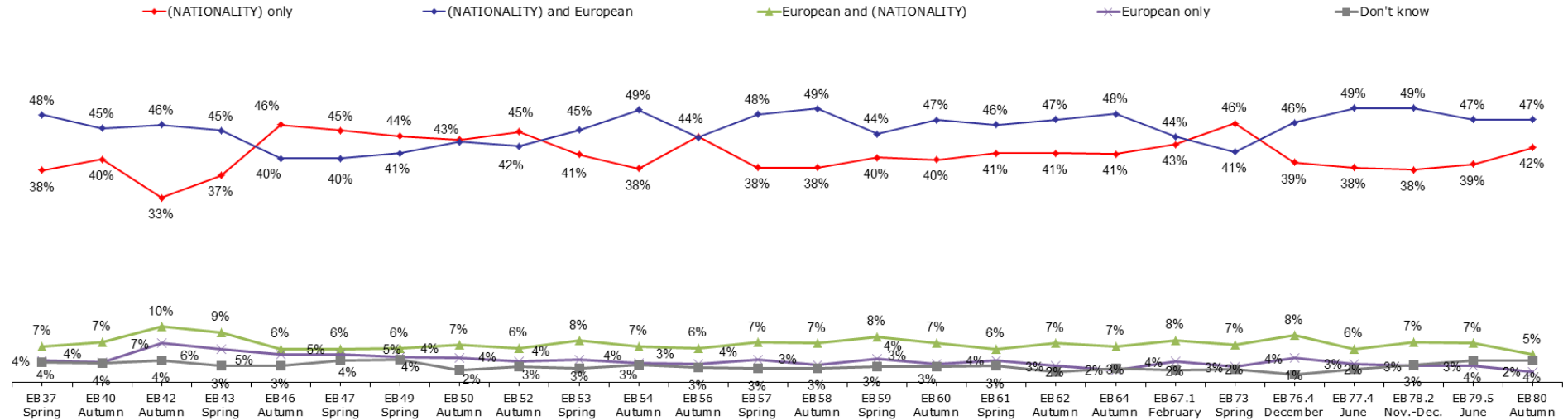


¹⁰ To what extent do you agree or disagree with each of the following statements?
- The voice of (OUR COUNTRY) counts in the EU -

2. A FEELING OF EUROPEAN CITIZENSHIP WHICH SURVIVES THE CRISIS

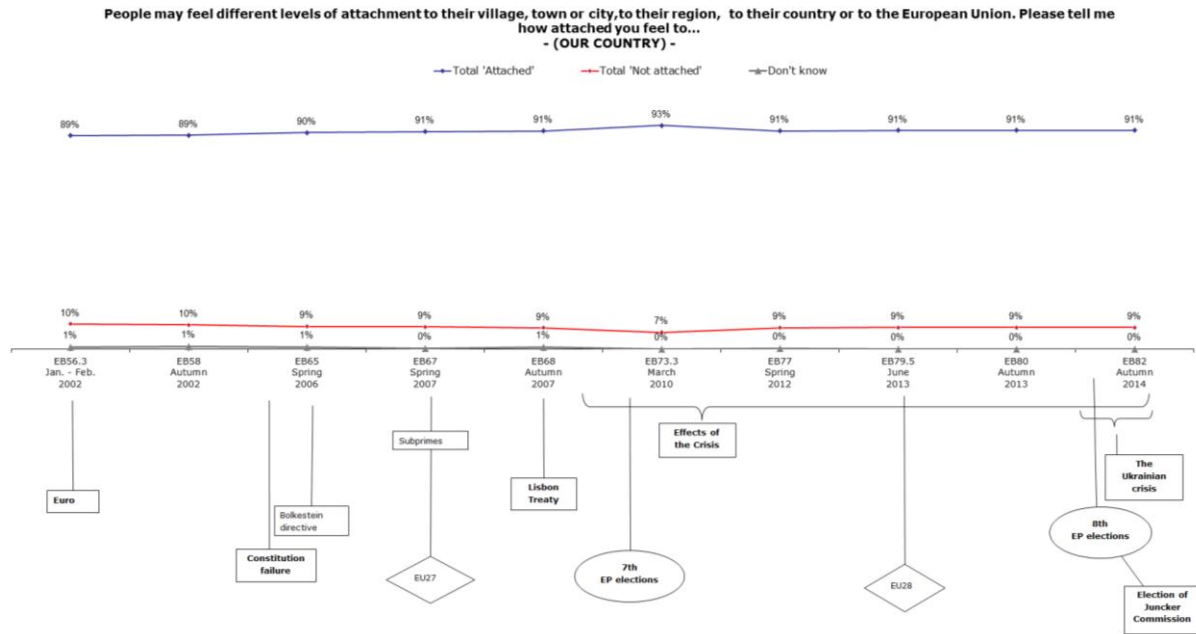
In most of the surveys analysed, **the majority of Europeans say that they see themselves as national and European** (in proportions of between 40% and 50%). **A significant number of them see themselves solely as national**, with this proportion even being in the majority between autumn 1996 and spring 1998, in autumn 1999 and in spring 2010. **10% or less see themselves as European and national, with an even smaller proportion seeing themselves as solely European.**

In the near future, do you see yourself as...?

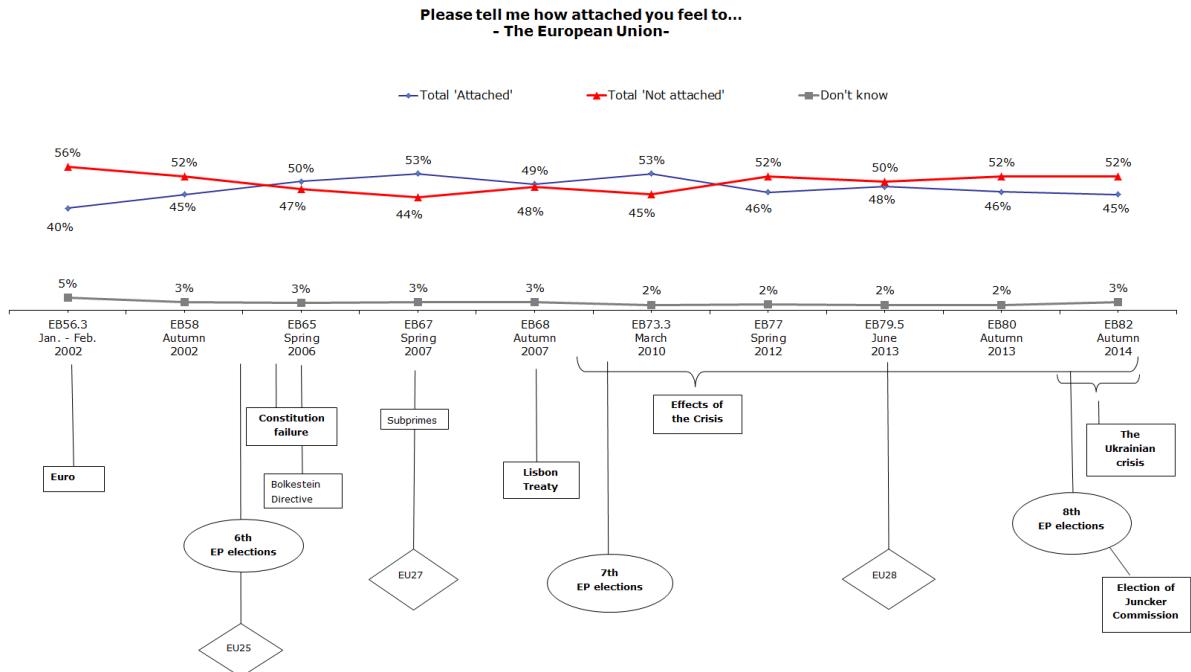


3. AN ENDURING ATTACHMENT TO THE EUROPEAN UNION

The attachment of Europeans to their country at around 90% is very strong and stable over time (around 90% between EB56.3 in January-February 2002 and EB82 in autumn 2014).



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 fell into the minority again from EB77 in spring 2012, until autumn 2014.



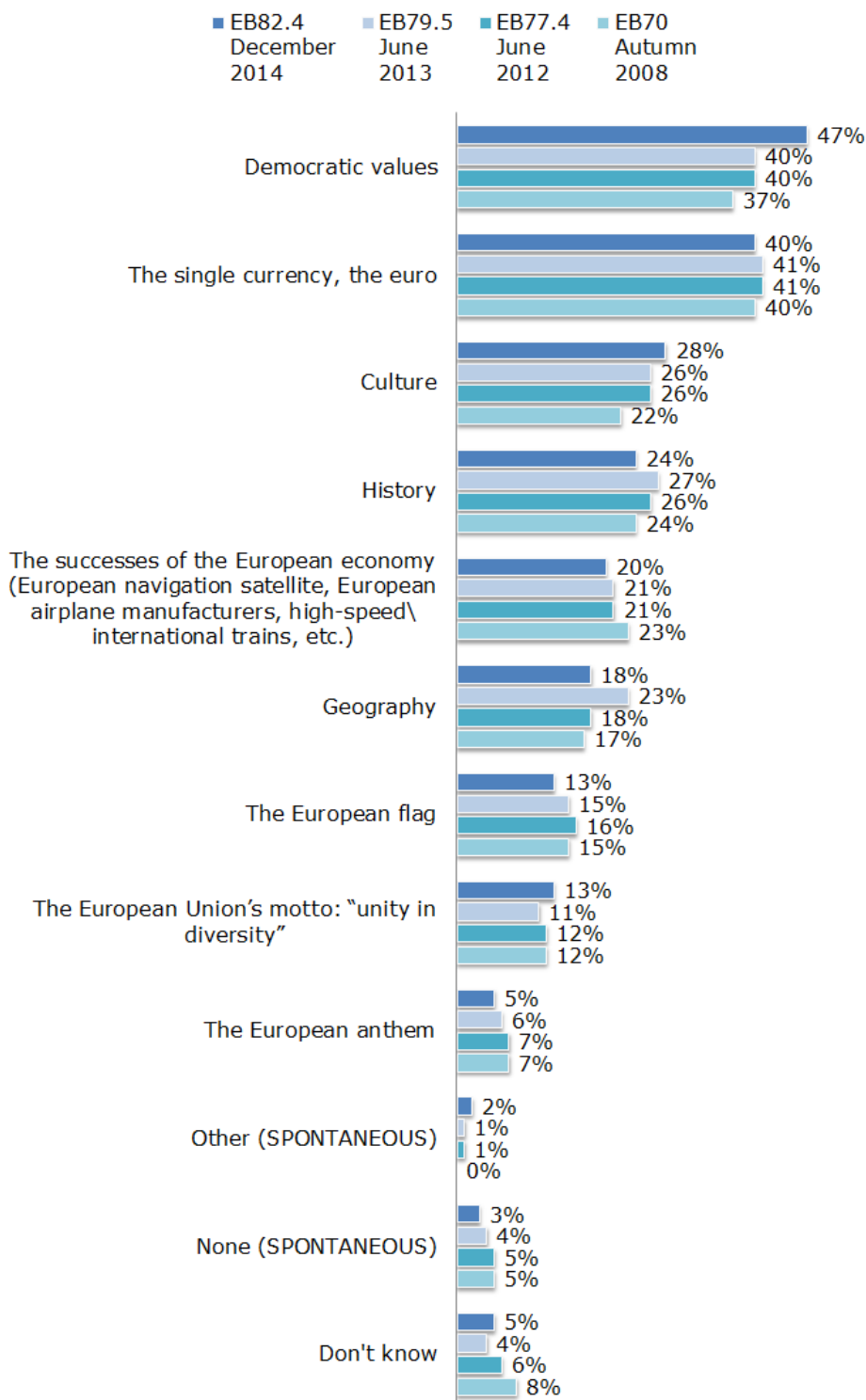
4. THE COMPONENTS OF AN EU IDENTITY

Identity markers which are retained in spite of the crisis

'Values of democracy and liberty' are identified by Europeans as the principal element constituting the identity of the EU in their eyes¹¹ (47% in EB82.4 of December 2014). In second place, Europeans place the euro (40% in December 2014), followed by culture (28%), history (24%), and 'the successes of the European economy' (20%). The other dimensions are cited by less than one fifth of Europeans.

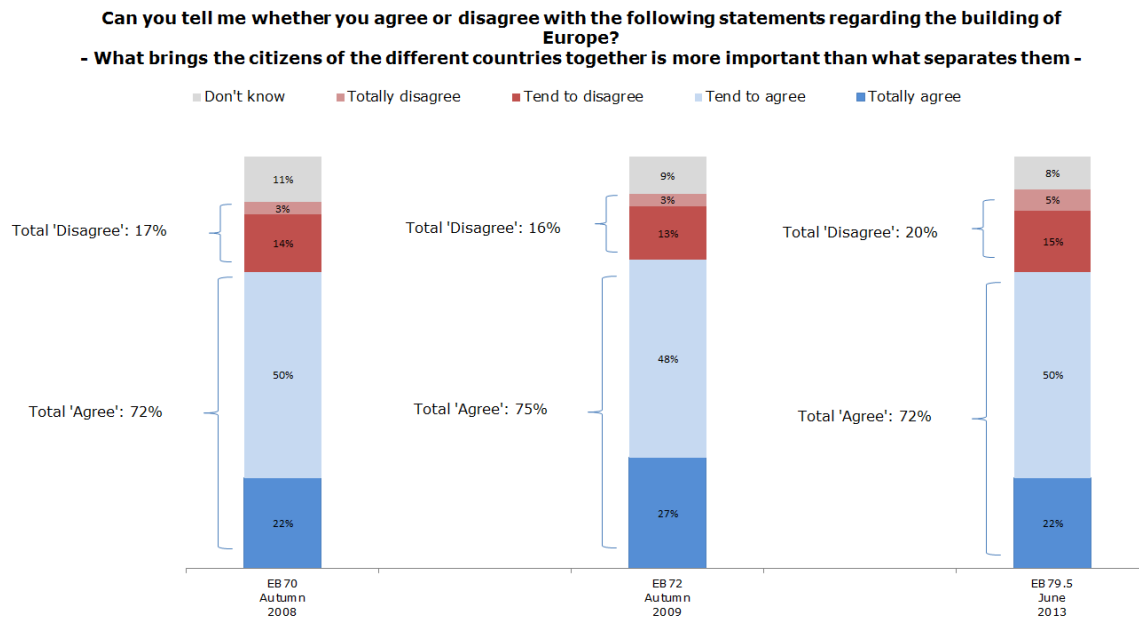
¹¹ Several elements may constitute the European identity. From the following, which do you consider to be the most important for constituting the European identity? (MAXIMUM 3 POSSIBLE RESPONSES)

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?



(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 the three occasions when the question was asked, in autumn 2008 (EB70), autumn 2009 (EB72) and June 2013 (EB79.5).



III. THE ECONOMY IN THE EU

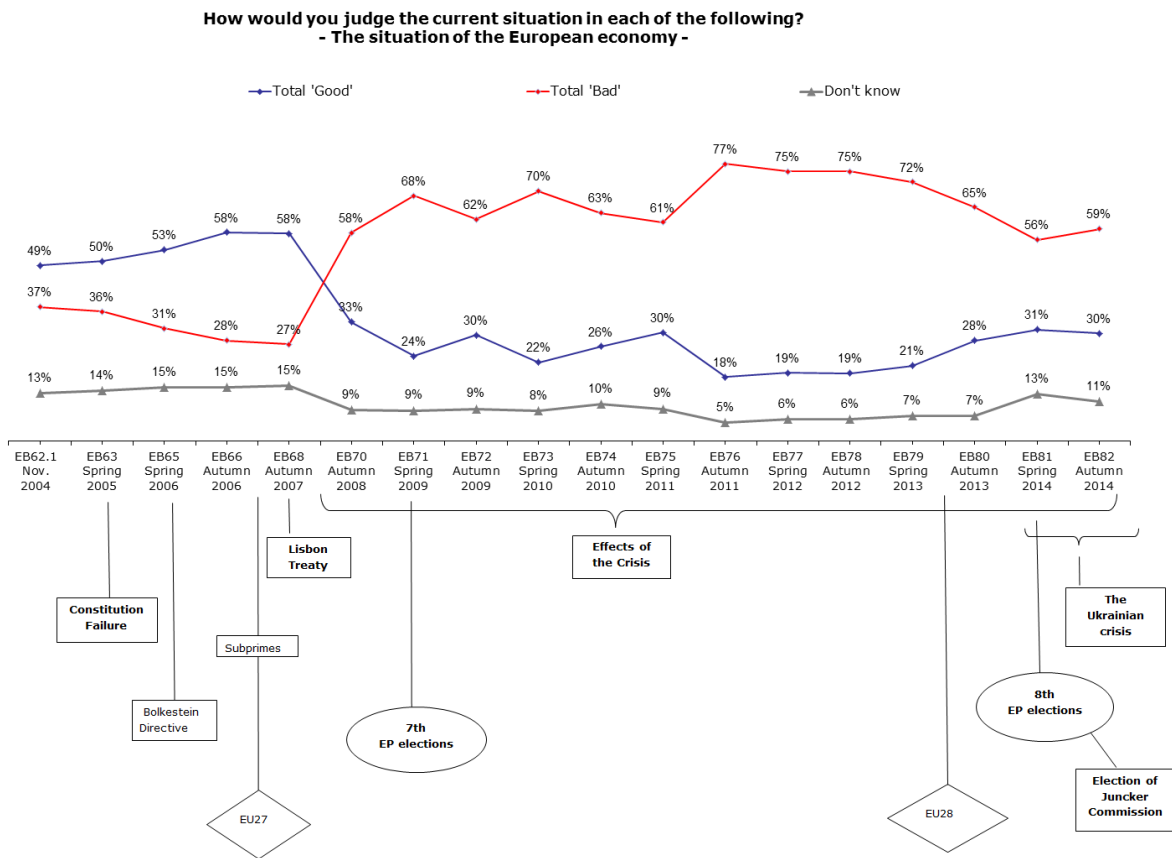
THE MAIN FINDINGS

- **The economic crisis has had a significant impact on Europeans' perceptions of the economic situation of their country and of the European Union:** both are now perceived as bad, even though this perception has improved slightly in recent surveys.
- Furthermore, whereas before the crisis, Europeans judged their national economy more harshly than that of the European Union, things have reversed with the debt crisis. **The European Union therefore no longer seems to appear as a reassuring scale of reference in the crisis.**
- **In terms of short-term expectations, pessimism wins over optimism across the various dimensions tested** (national, European economic situation, employment situation in the country), in the vast majority of surveys. The predominant feeling is that things are not going to change.
- **Another sign of hardening of opinion:** whilst European public opinion remains for the most part in favour of coordinated responses to the crisis, we are seeing an increase in the proportion of Europeans wanting individual measures.
- Today, **the proportion of Europeans who want to wait until all Member States are ready in order to intensify the development of a common European policy is clearly higher** than the proportion of those who want to do so without waiting until the other Member States are ready.
- Nevertheless, the fact that **Europeans continue to believe that the European Union is the most credible player to act effectively in the face of the crisis** is an encouraging sign.
- **The keys to improving economic performance** are training and innovation, but the crisis has highlighted other issues such as reducing public debt, and has given a lower profile to investment concepts.
- **Europeans' expectations of the EU relate first and foremost to the economy:** they want the European budget to be allocated first to social issues and employment, and to economic growth.

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

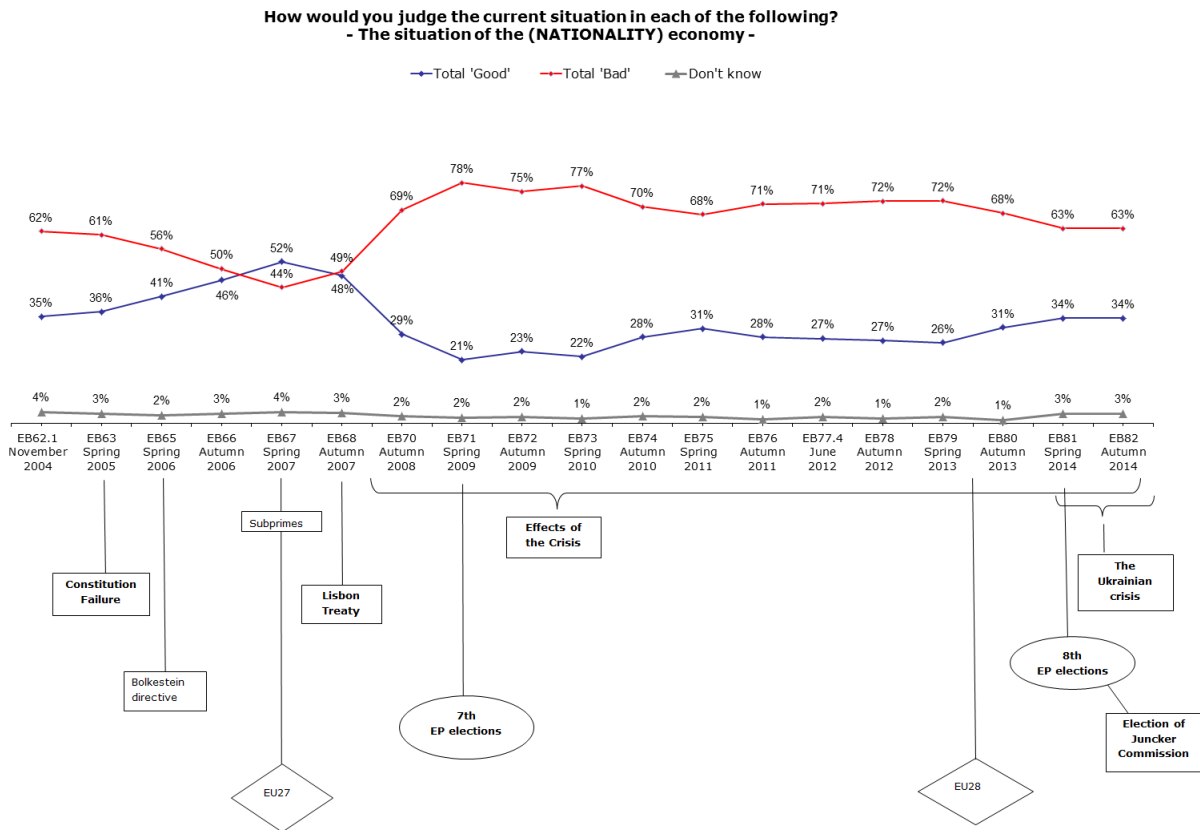
Judgments about the European economy and about the national economy dropped wildly towards negative in 2008, after the onset of the economic crisis.

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.

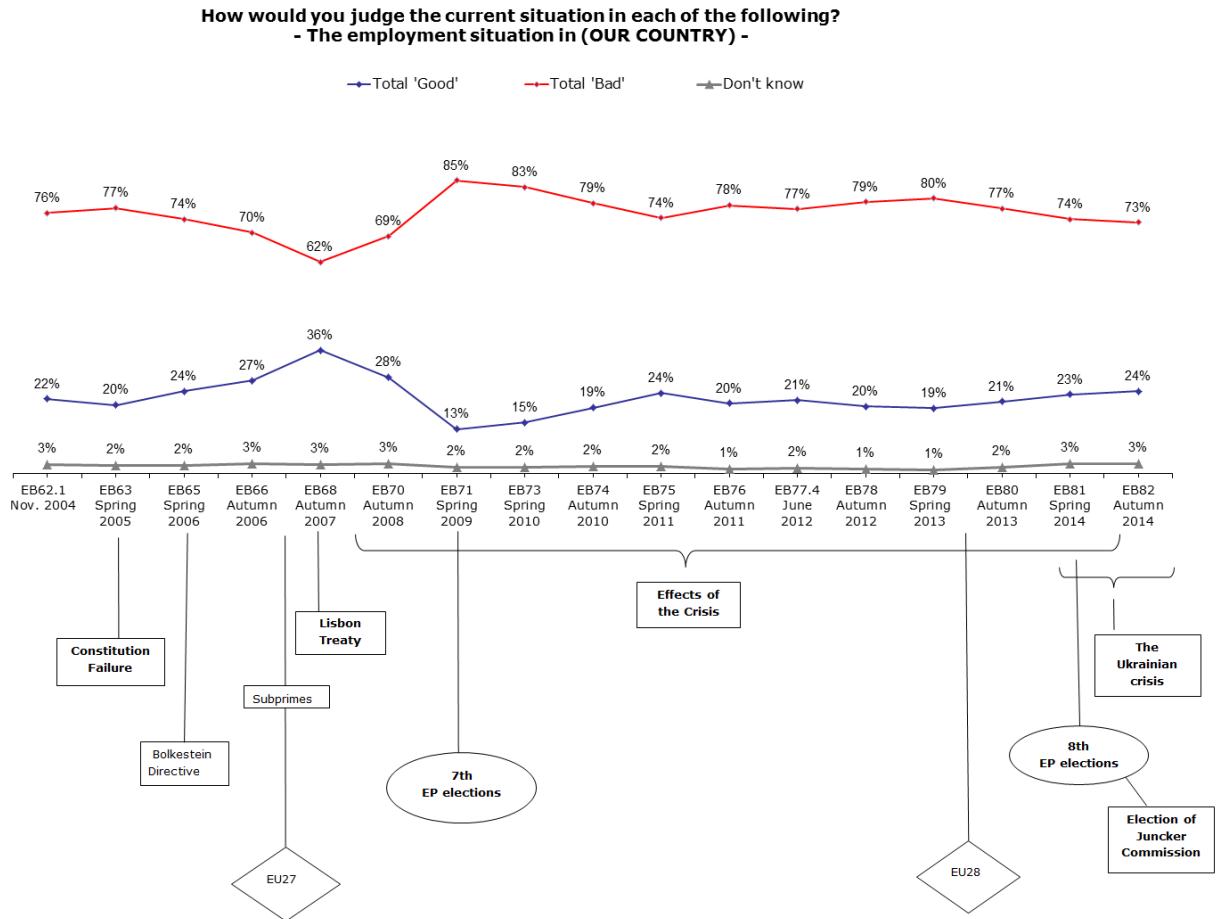


¹² What is your assessment of the current situation in each of the following areas? The situation of the (NATIONALITY) economy / The situation of the European economy / The employment situation in (OUR COUNTRY).

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.** Main difference from the perception of the European economy, the judgments were negative in 2004, and remain 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.



The assessment of the employment situation at national level has seen a similar change over the period, with a clear majority of negative judgments, 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

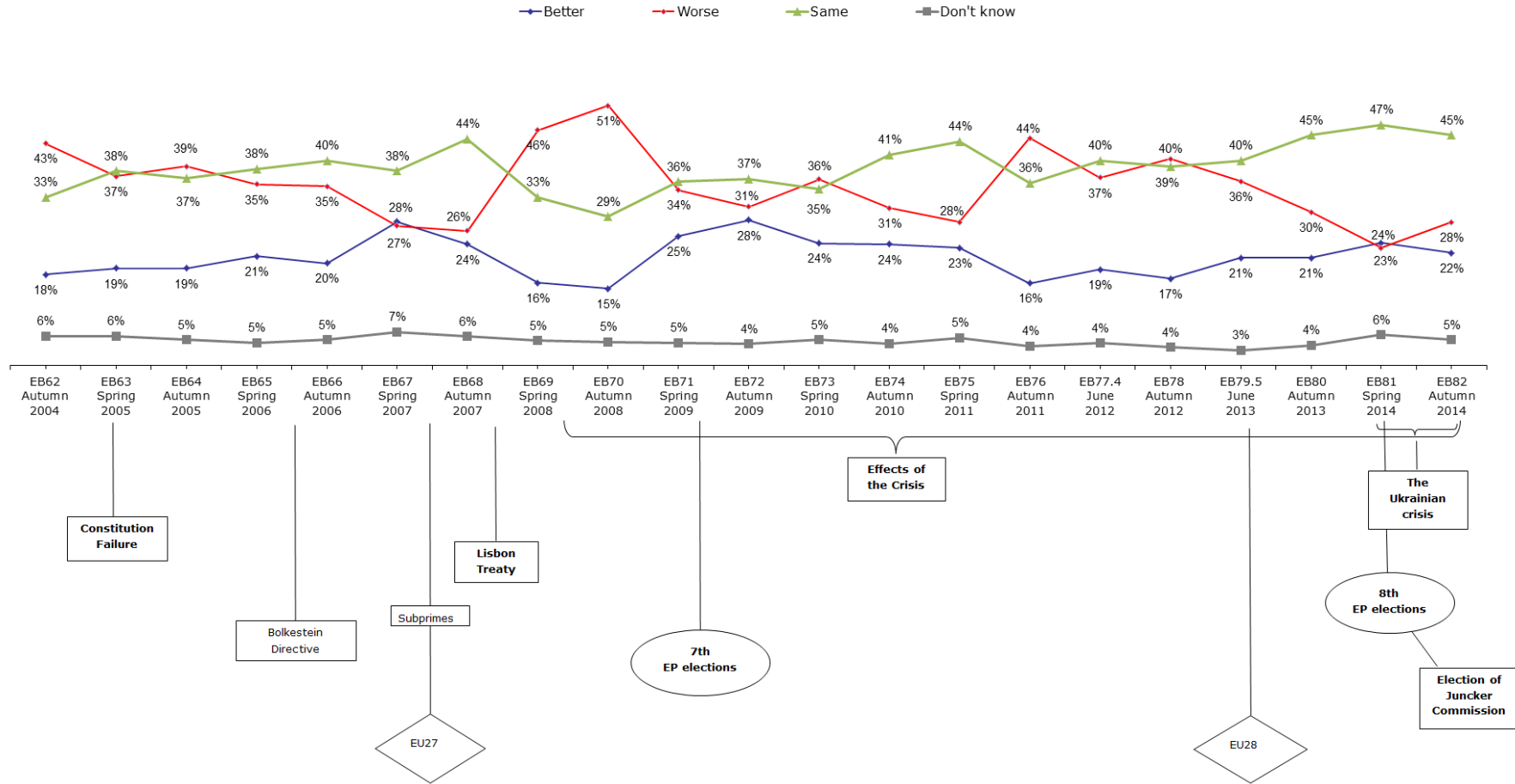
Economic projections as a whole are fairly gloomy: fewer than one third are optimistic, whichever indicator is analysed

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 autumn 2014 (EB82)). It is the pessimism curve (response 'less good') which has shown the greatest changes. In the spring 2014 survey (EB81), optimism prevailed over pessimism (24% 'better' against 23% 'less good'): it is the second time in the history of this indicator, with EB67 in spring 2007 (28% against 27%).

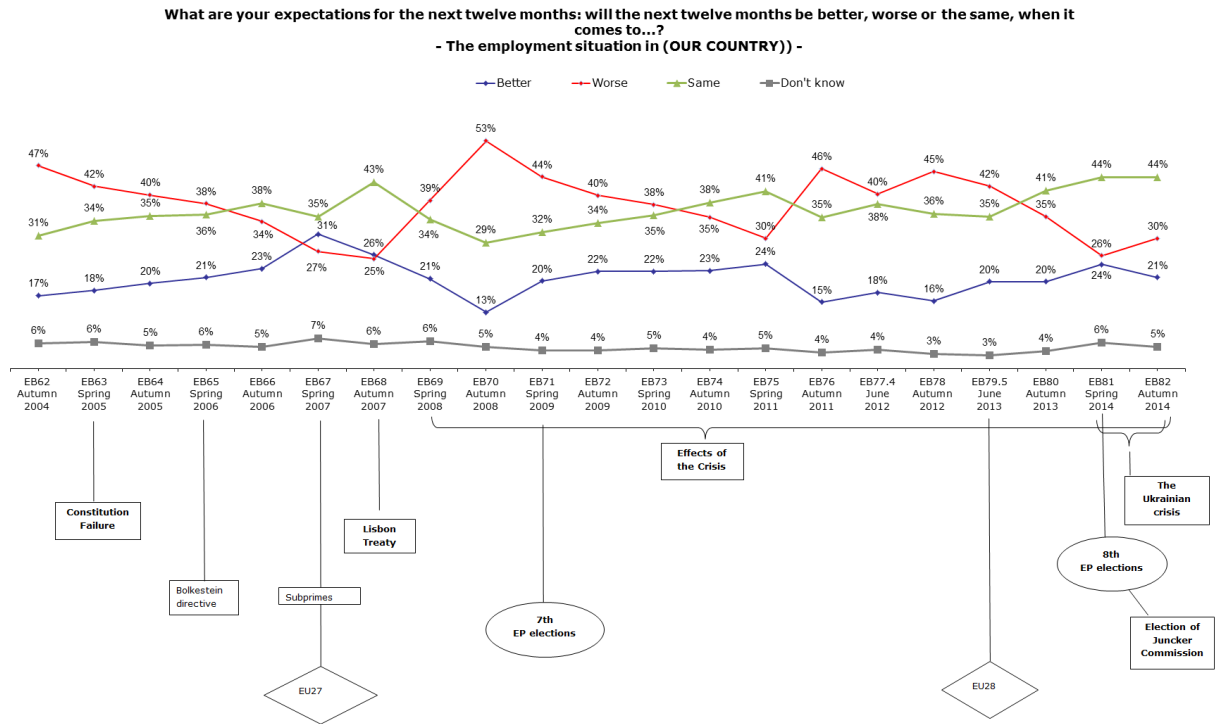
Over and above these two aspects, it is the response 'same' which takes a clear lead.

¹³ What are your expectations for the coming twelve months: will the next twelve months be better, less good or no change with regard to ... ? The economic situation in (OUR COUNTRY / The economic situation in the EU / The employment situation in (OUR COUNTRY)).

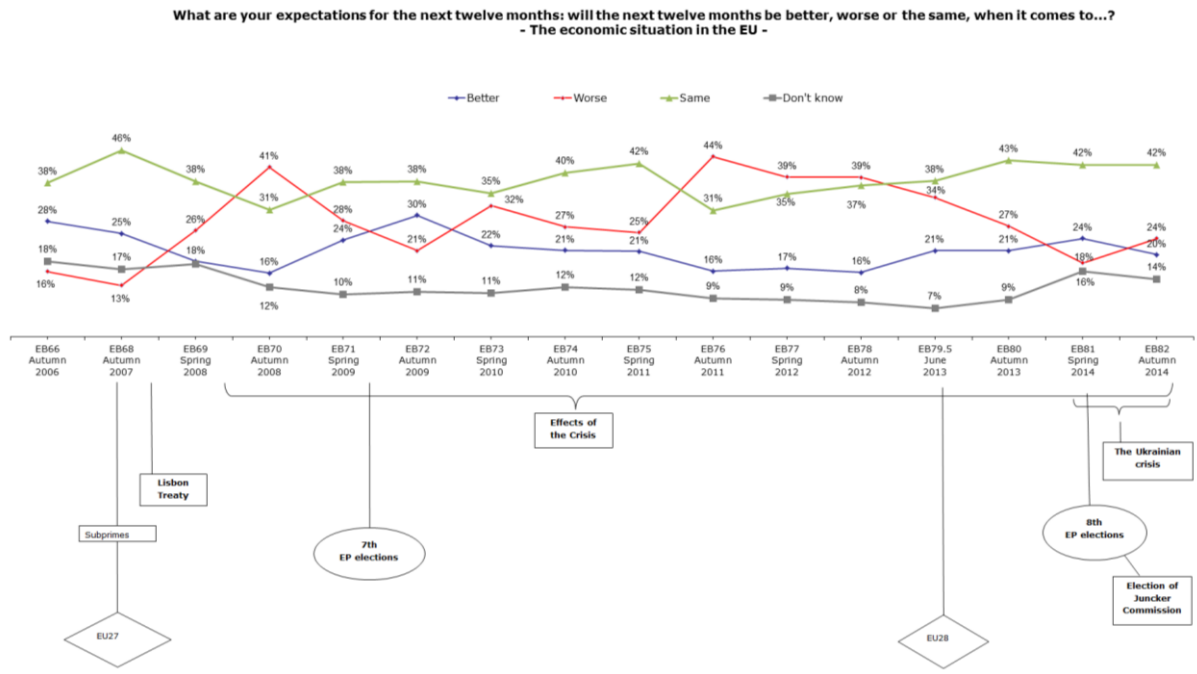
What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...? - The economic situation in (OUR COUNTRY) -



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 (EB67) and autumn 2007 (EB68) 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 autumn 2014 (EB82)), the response 'same' is in the majority in most of the surveys analysed.

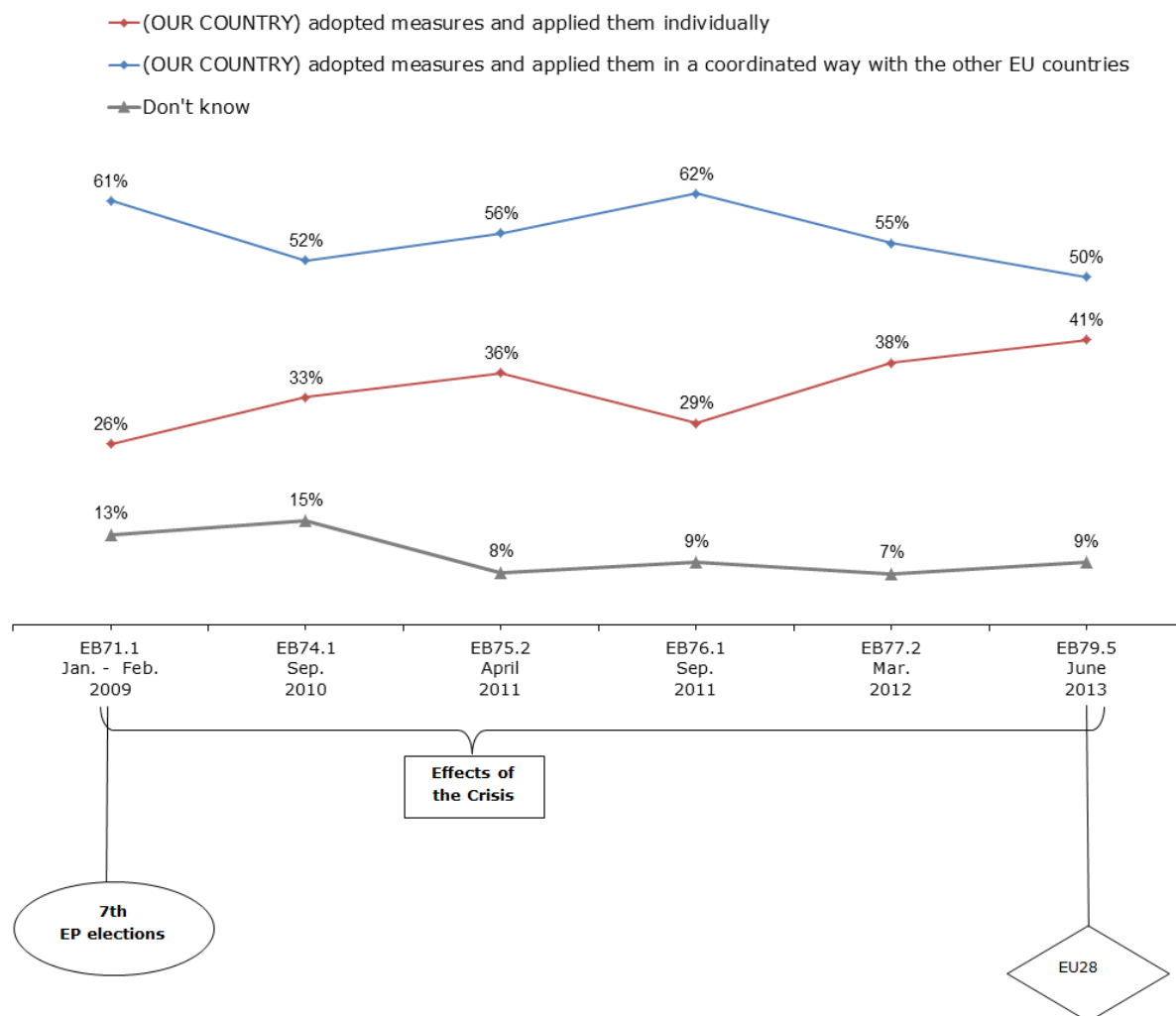


3. THE EUROPEAN UNION IN THE FACE OF THE CRISIS

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 gradually went from 26% to 41%. Over the same period, advocates of 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...?

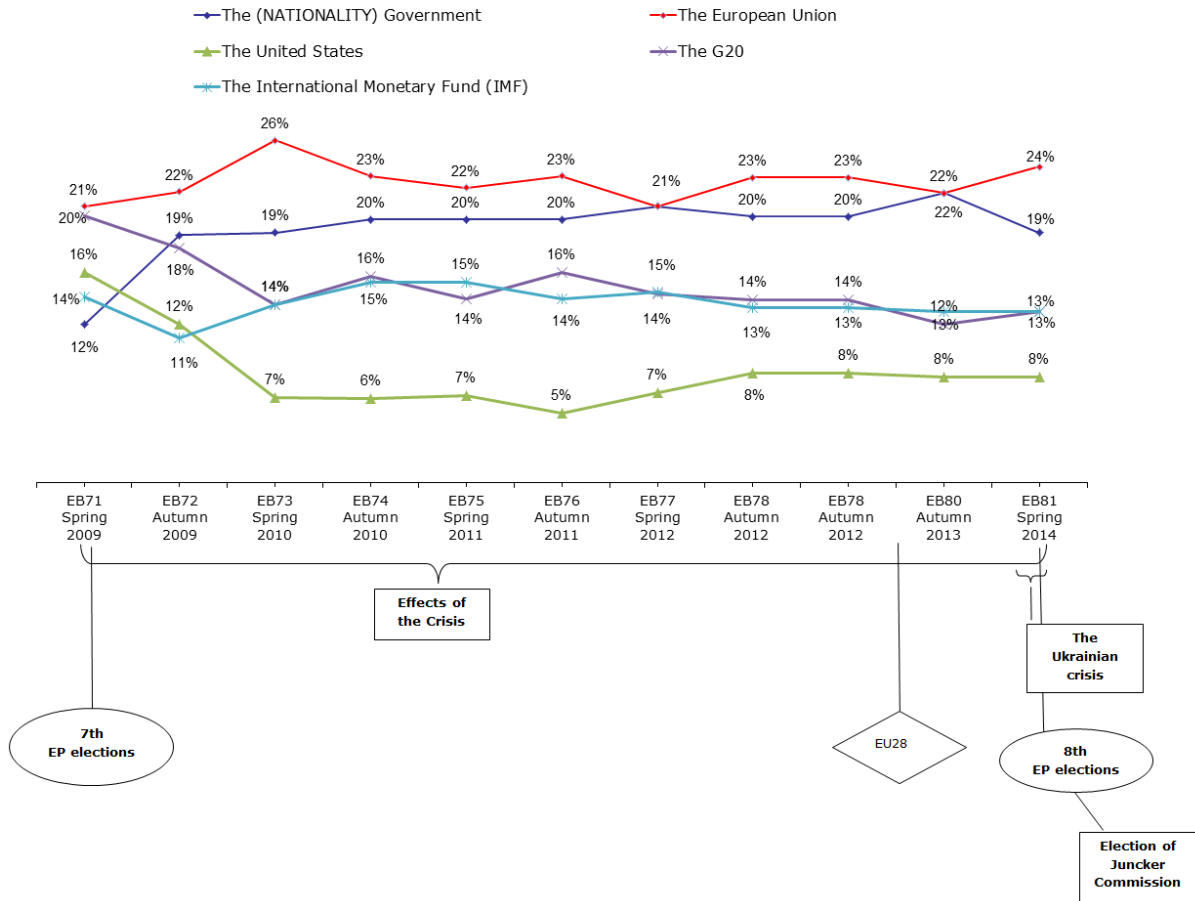


¹⁴ As a citizen, would you say that you would be better protected against the current crisis if ... ? (OUR COUNTRY) took measures and applied them individually / (OUR COUNTRY) took measures and applied them in a coordinated manner with other EU countries / Don't know.

The European Union remains the player most able to act effectively against the crisis

The European Union is at the head of the players who would appear to be the most able to act effectively against the consequences of the crisis, closely followed by the national government. The other players, G20, FMI and USA are cited less often.

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

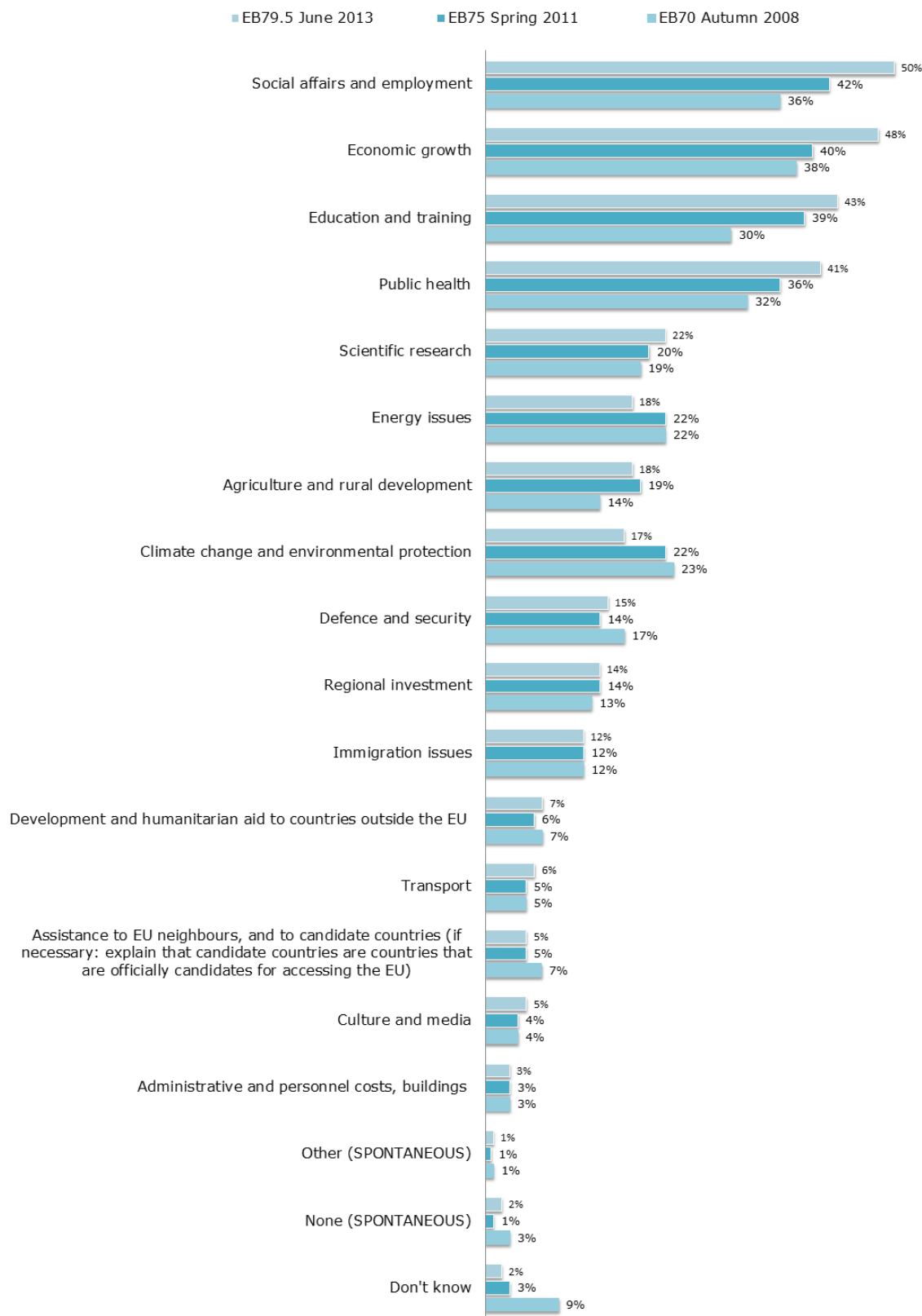


High and varied expectations of the European Union

When Europeans are asked about the priority areas to which they would like to see the European Union's budget allocated¹⁵, many subjects are quoted, a sign that expectations of the EU are high and varied. At the forefront, we find two economic issues: **social affairs and employment** (50% in June 2013, i.e. +14 points since this question was first asked, in autumn 2008 in EB70), and **economic growth** (48%, +10). Then come **education and training** (43%, +13), and **public health** (41%, +9). The other dimensions are cited by fewer than a quarter of Europeans.

¹⁵ And among the following areas, which are the ones where, in your opinion, the EU should use its budget ? First of all? And then? (MAXIMUM 4 POSSIBLE RESPONSES)

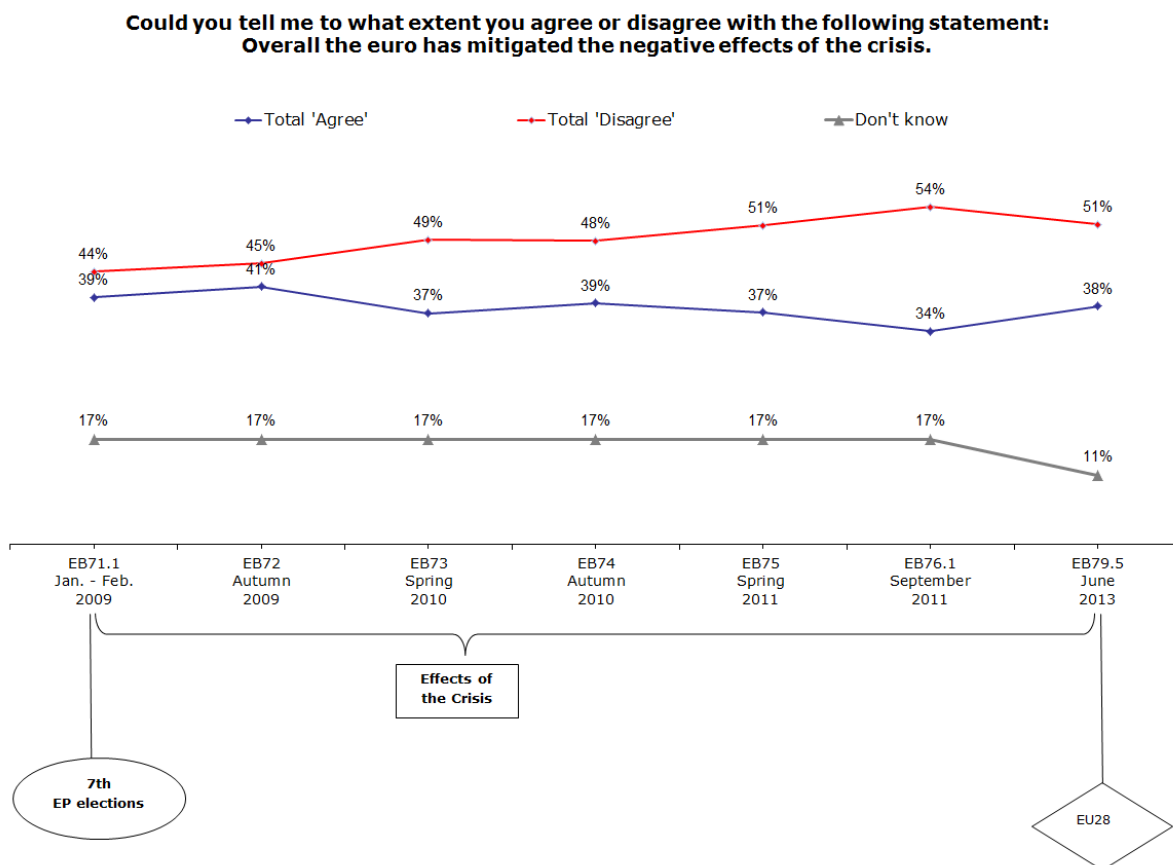
And on which of the following would you like EU budget to be spent? Firstly? And then?



(MAXIMUM 4 POSSIBLE RESPONSES)

An increasing majority do not think that the euro has limited the effects of the crisis

Although Europeans identify the European Union as a credible player when it comes to combating the financial and economic crisis, **they do not see the single currency as having a role to play in limiting the impact of the crisis**¹⁶. The proportion of Europeans who disagree with the stance that overall the euro has mitigated the negative effects of the crisis has always been in the majority since the start of 2009 (EB71.1), and has grown overall, exceeding 50% since spring 2011 (EB75).



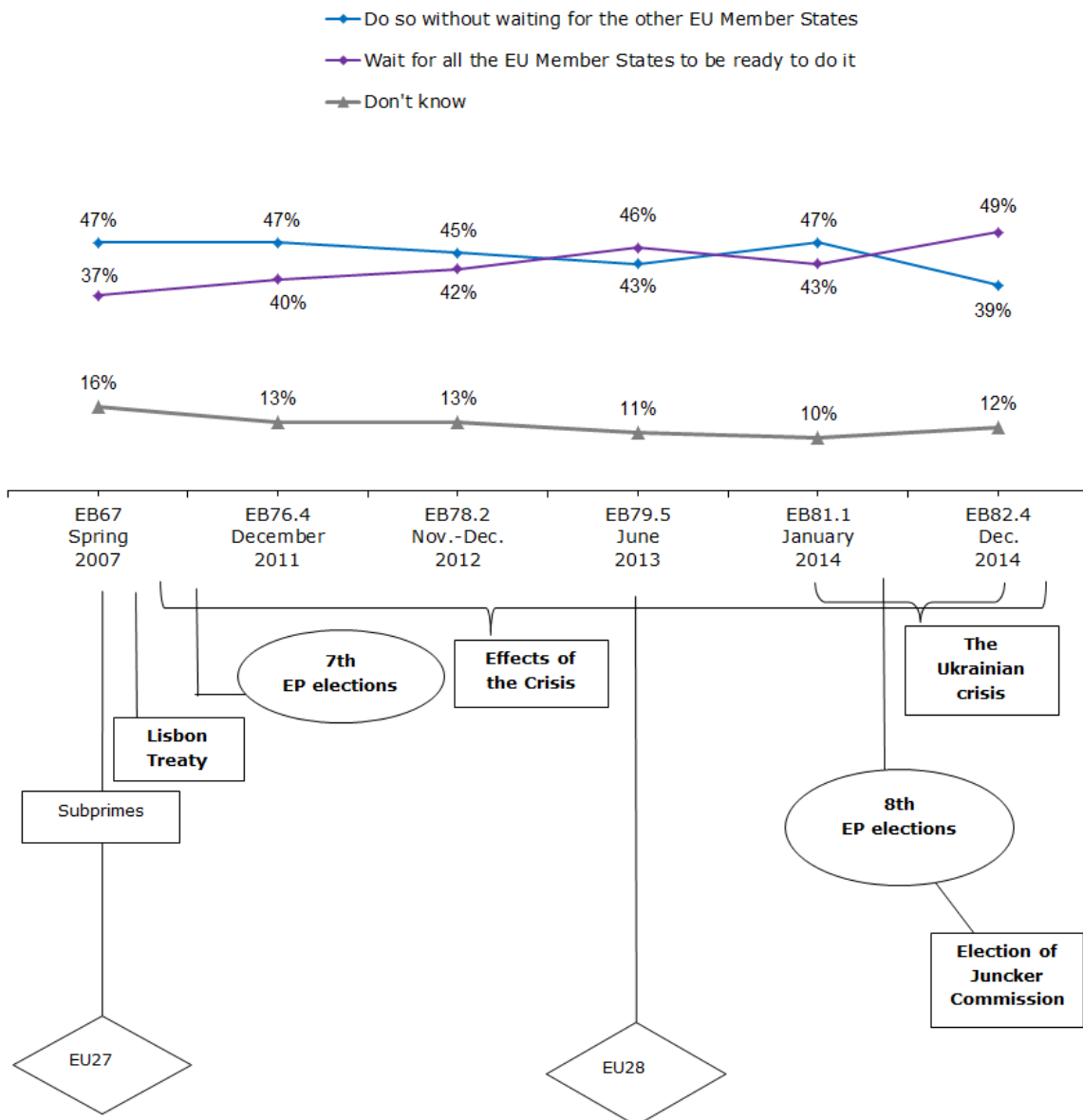
Yet in the eyes of the same Europeans, as shown on the page 14, the euro comes in second place when they are asked what the EU represents for them personally. Furthermore the euro is also one of the most important elements in the European identity, since it comes in second place after democratic values (page 32).

¹⁶ Can you tell me to what extent you agree or disagree with the following proposition: Overall the euro has mitigated the negative effects of the crisis.

Europeans divided on the pace of integration

The opinion that Europe should wait until all Member States are ready before intensifying the development of a common European policy in certain important areas has gained ground since the first time the question was asked, in spring 2007 (EB67.2): it has become the majority opinion, going from 37% in spring 2007, to 49% in December 2014 (EB82.4).

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

How to strengthen the economic performance of the European Union

Europeans have been called upon, since autumn 2004, to classify what initiatives would, in their view, strengthen the economic performance of the EU¹⁷: across the whole of the period under review, running from autumn 2004 to June 2013¹⁸, they place the greatest priority on **'improving education and professional training'**. The issue receives some 60% of the mentions up until the onset of the economic crisis of 2008. From 2009, i.e. after the start of the crisis, but also the addition of new items, it is cited less often, whilst still remaining largely at the forefront.

From 2004 to 2009, the second axis for improving the economic performance of the European Union is **'investment in research and innovation'**. From EB72 in autumn 2009, approximately one year after the start of the crisis, it remains a priority issue in the eyes of Europeans, even though it is cited less often. **'Reduction of debt and public deficits'**, introduced at the time when the crisis was becoming a debt crisis, in EB72 in spring 2010, was to gain in importance and occupy second place from autumn 2010.

'Making it easier to start businesses' is also perceived as a priority lever for improving the performance of the European economy: this dimension occupies third place in most of the surveys analysed.

¹⁷ Which three initiatives would most improve the performance of the European economy? (MAXIMUM 3 POSSIBLE RESPONSES)

¹⁸ Note: new items were progressively added on this question in 2009 and 2010, changing the hierarchy of the responses. It nevertheless seems interesting to pay attention to these changes which make sense in the context of an economic crisis, whilst still respecting the usual methodological precautions, associated with changing the list offered to the 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%

(MAXIMUM 3 POSSIBLE RESPONSES)

IV. THE LIVES OF EUROPEANS

THE MAIN FINDINGS

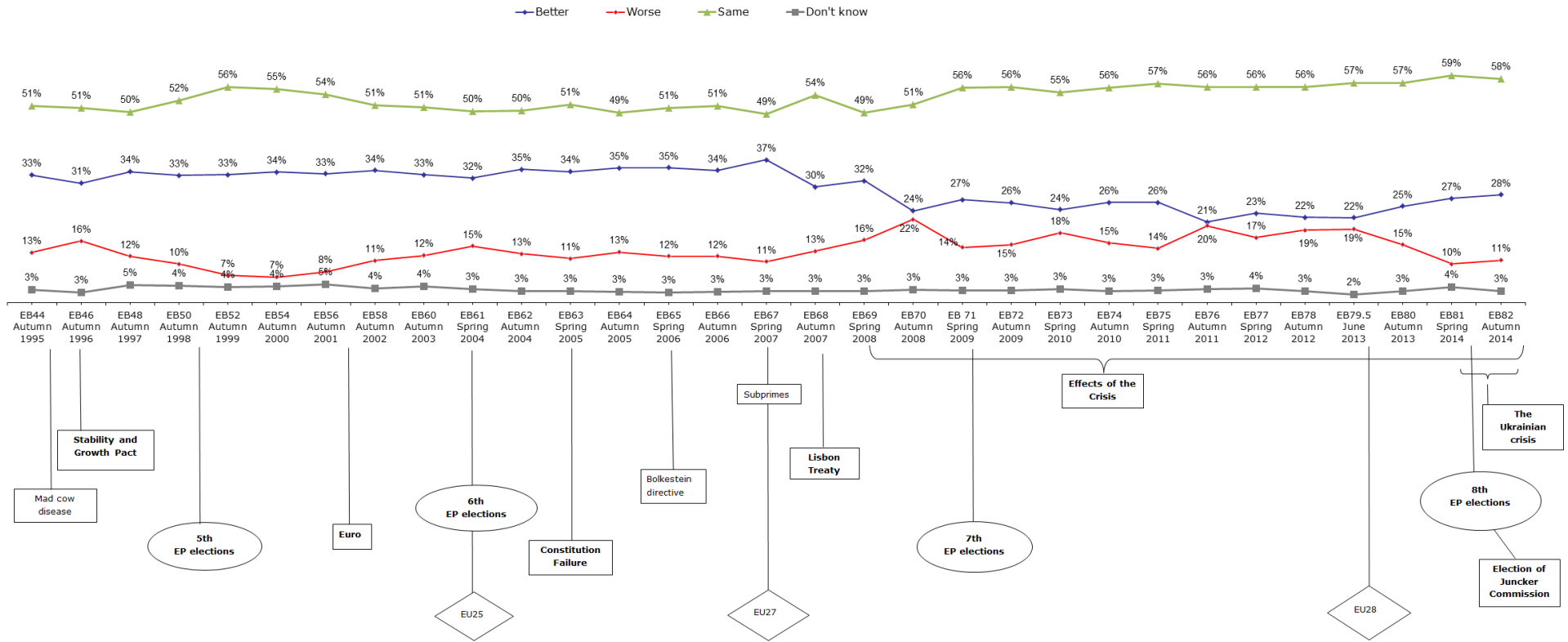
- **Europeans' expectations regarding their personal lives are dominated by the feeling that things will remain the same in the coming year.** The positive projections win out over the negative ones, in the majority of the surveys analysed. These expectations have been clearly affected by the crisis.
- **As regards 'life in general',** optimism fell whilst pessimism was gaining ground: from autumn 2007, initially, then stalling again in autumn 2011. Fear of suffering the effects of the crisis more directly increased in European public opinion.
- The mechanism is the same in the case of **career prospects**, tested between 1998 and 2014.
- It is the **financial prospects of the household** which have been undermined the most in recent years, with pessimism for the coming months prevailing over optimism from spring 2008, but even more markedly still from autumn 2011. Optimism won out again over pessimism from spring 2014 (EB81).

Personal projections of the future have remained stable over time

Throughout the period from autumn 1995 to autumn 2014, a clear majority of Europeans feels that their 'life in general' is going to remain 'unchanged' over the next 12 months (with values of between 49% and 59% across the whole of the period)¹⁹. The proportion of optimists systematically wins out over the pessimists, even though the difference has reduced significantly with the economic crisis (from +27 in EB54 in autumn 2000, to +1 in EB76 in autumn 2011). However, since autumn 2013 (EB80), this difference has increased slightly (+17 in survey EB82 in autumn 2014).

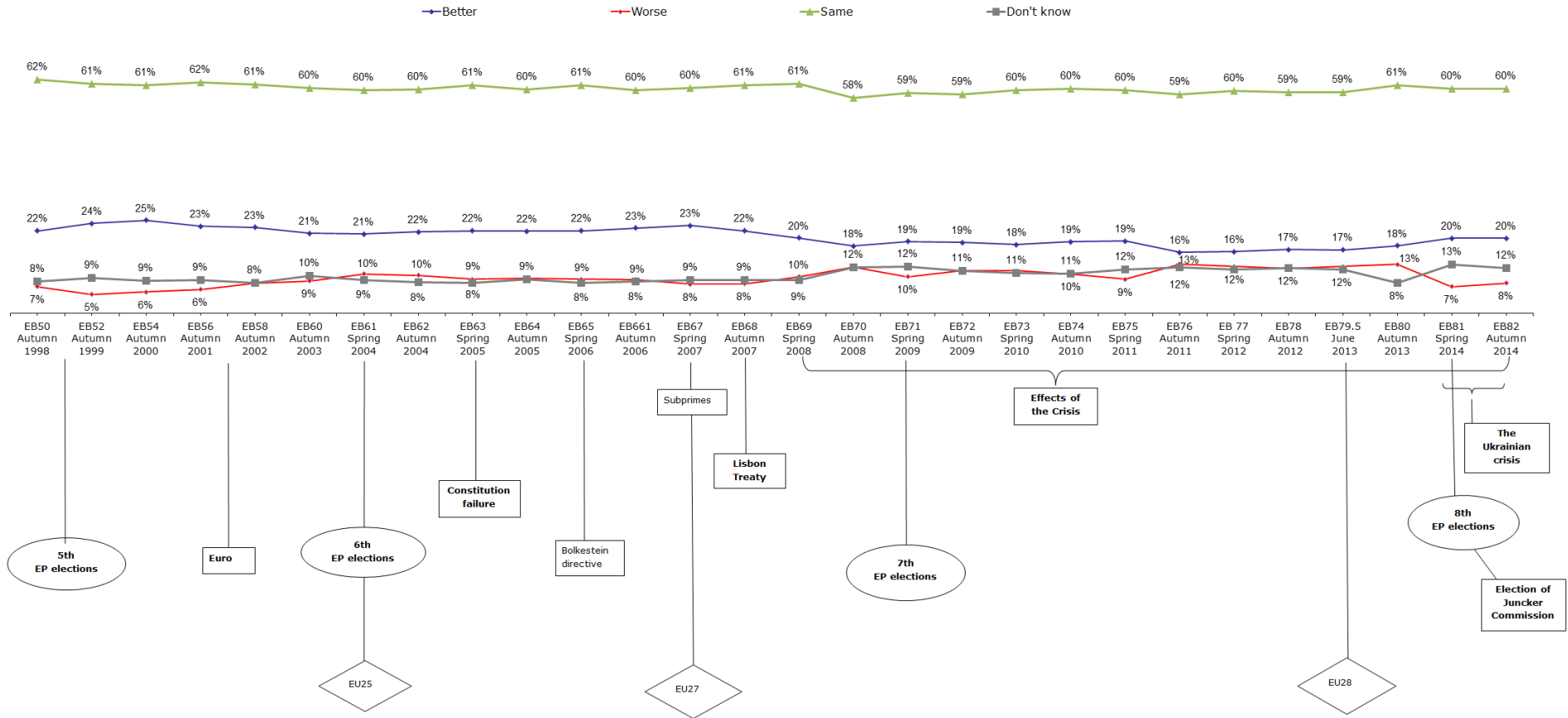
¹⁹ What are your expectations for the next twelve months: will the next twelve months be better, worse or no change, as regards ... ? Your life in general / The financial situation of your household / Your professional situation.

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 -



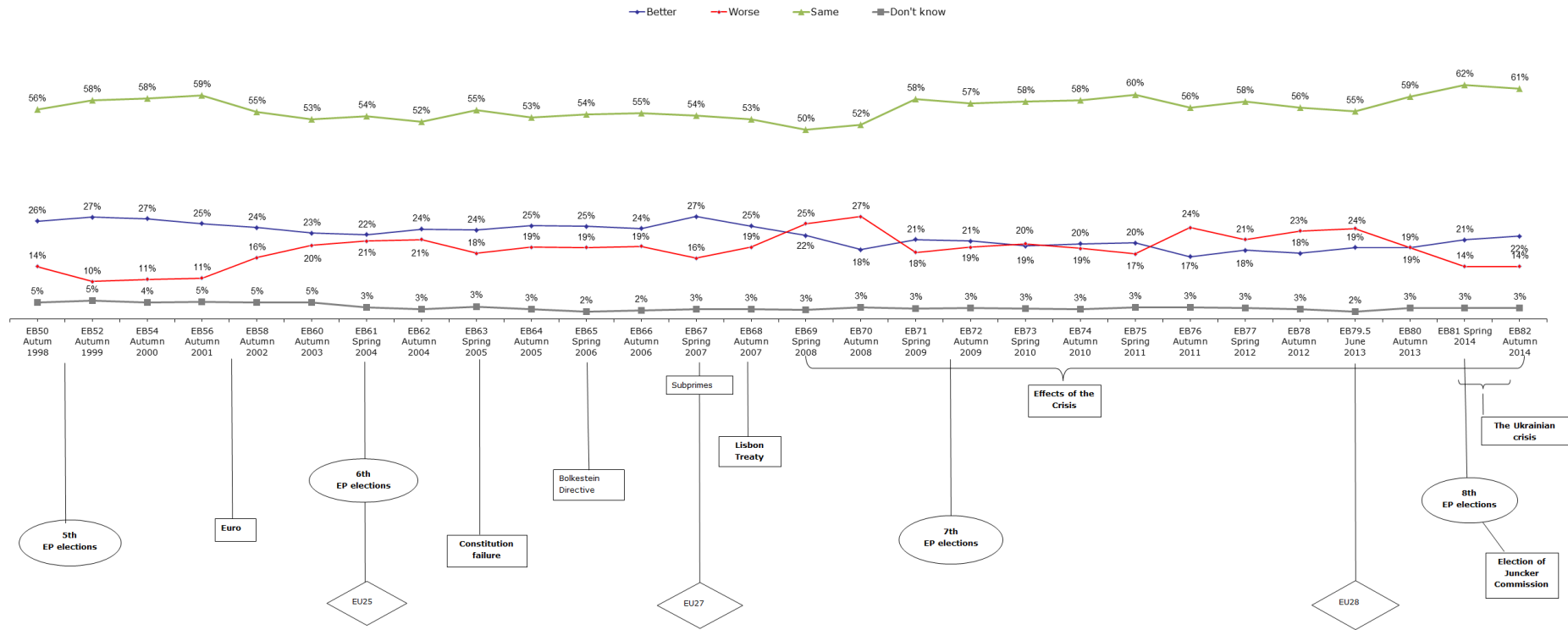
The findings are quite close, but even more stable, when Europeans are asked more specifically about their career prospects: an absolute majority of Europeans, varying very little between 1998 and 2014, believe that things will remain unchanged in the coming year. Across the whole of the period under review, the proportion of Europeans who believe that their professional life is going to improve remains higher than the proportion of those expecting deterioration. The difference reduces with the crisis, but in lesser proportions than for 'life in general'.

What are your expectations for the next twelve months: will the next twelve months be better, worse or the same, when it comes to...?
- Your personal job situation -



The major trends are the same when Europeans are asked about how they expect the financial situation of their household to change: the majority of them expect their situation to stagnate in the coming year (between 50% and 60% over the whole of the period from 1998 to 2012).

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 -



V. IMMIGRATION

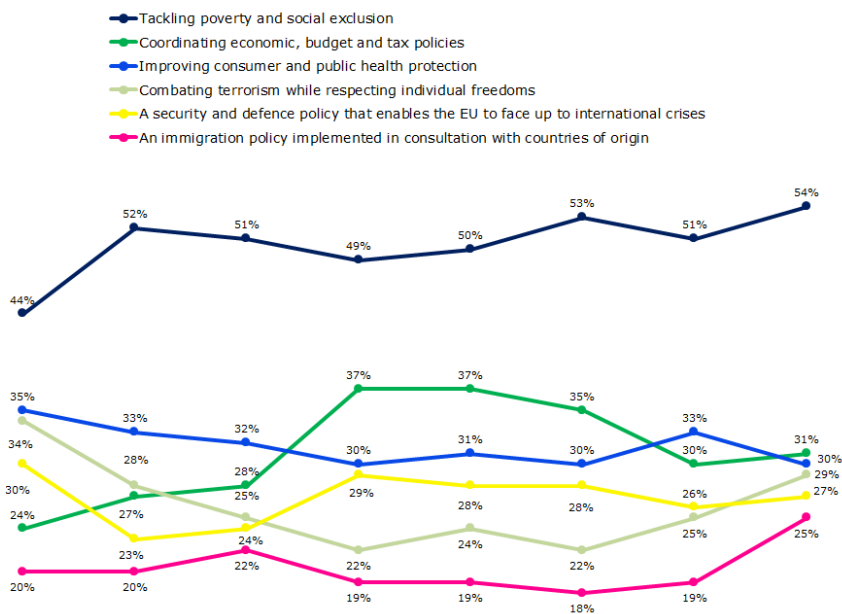
THE MAIN FINDINGS

- **'A concerted immigration policy with the countries of origin'** is a policy priority wished for more strongly over the last two years, but which still remains in sixth place on the list of these priority policies which Europeans want to see defended by the EP.
- **Immigration is a subject which divides Europeans:** approximately half of them believe that immigrants contribute a lot to their country. But a substantial minority are of the opposite opinion.
- **Just over half of Europeans have a positive image of intra-Community immigration,** with more than six out of ten having a negative image. This last finding is paradoxical, as over the same period, 'freedom to travel, study and work anywhere in the European Union' is the first thing that Europeans associated with the EU (see section I).
- **European public opinion is more critical of immigration from non-EU countries:** only just over a third are positive, against an absolute majority who say that they have a negative opinion.
- **In seven Member States, the majority of the population is against immigration, whether within or outside the Community:** Hungary, United Kingdom, Slovakia, Cyprus, Italy, Czech Republic and Latvia.

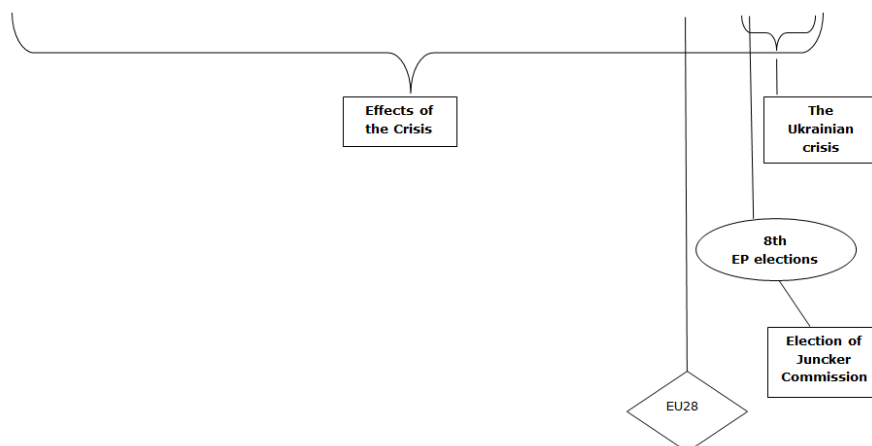
'An immigration policy implemented in consultation with countries of origin' is in sixth place on the list of policies which should be a priority for the European Parliament, according to citizens. Throughout the period from January-February 2010 to December 2014 (EB82.4), this dimension was never in the top 5 priority policies, which remains largely dominated by 'the fight against poverty and social exclusion' (for which mentions have varied between 49% and 54% since August-September 2010).

Across the whole of the period, immigration also remains less mentioned than 'the coordination of economic, budgetary and fiscal policies', 'greater protection for the consumer and public health', 'the fight against terrorism whilst respecting individual freedoms' and 'a security and defence policy enabling the EU to face up to international crises'. However, immigration is the dimension which has changed the most since 2013 (+6 points, to 25%).

The European Parliament promotes the development of certain policies at EU level. In your opinion which of the following policies should be given priority? Firstly? And then? (MAX. 4 ANSWERS) - % EU

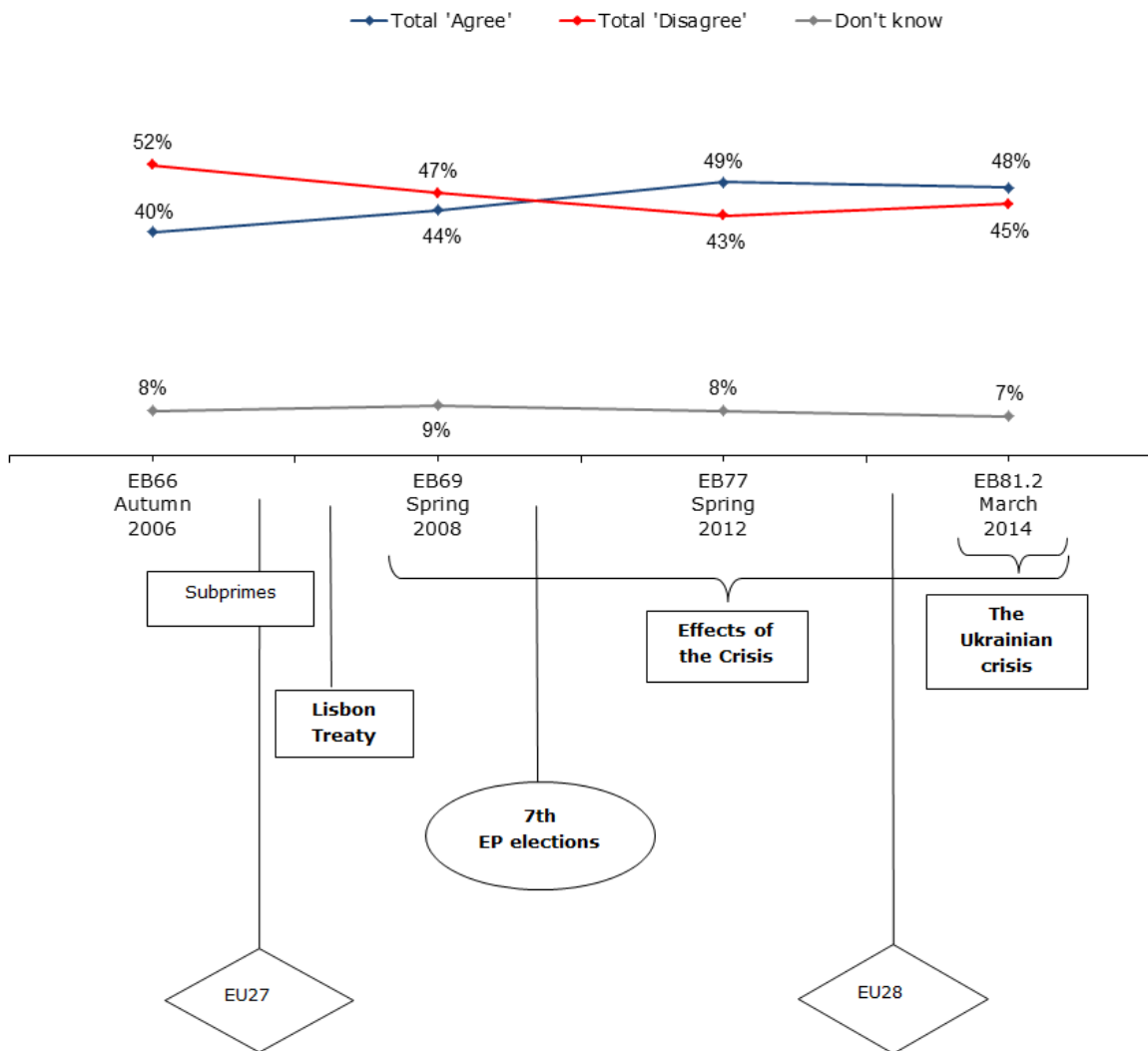


Jan.-Feb. 2010 EB73.1	Aug.-Sept. 2010 EB74.1	April-May 2011 EB75.2	Nov. 2011 EB76.3	June 2012 EB77.4	Nov.-Dec. 2012 EB78.2	June 2013 EB79.5	Dec. 2014 EB82.4
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Europeans are split on the contribution of immigration: **a narrow majority believes that immigrants contribute a lot to their country**, with this feeling having gone up over the period under review, to become the majority (from 40% in EB66 in autumn 2006, to 48% in EB81.2 in March 2014). Over the same period, the proportion of Europeans who disagree with the proposition fell from 52% to 45%.

To what extent do you agree or disagree with each of the following statements?
- Immigrants contribute a lot to (OUR COUNTRY) -



For the majority of Europeans, 'the immigration of people from other EU Member States' evokes something positive (52%, against 41% for whom it evokes something negative). When the question this time relates to 'the immigration of people coming from outside the EU', the findings are reversed: only 35% of Europeans have a positive feeling, whereas 57% have a negative feeling.

QA11. Please tell me whether each of the following statements evokes a positive or negative feeling for you.

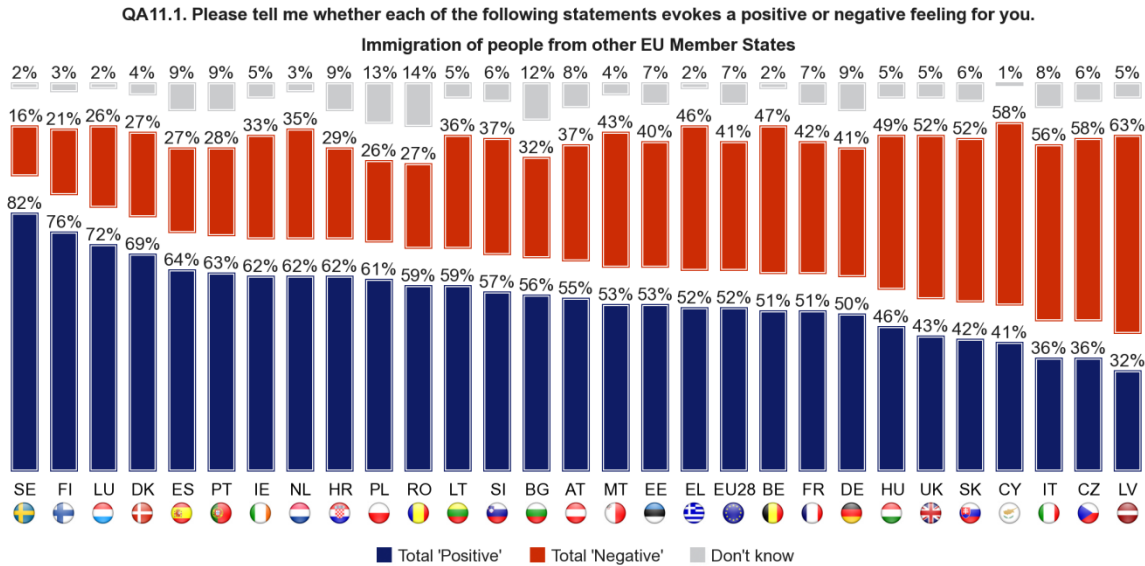


Total 'Positive'
 Total 'Negative'
 Don't know

EU28

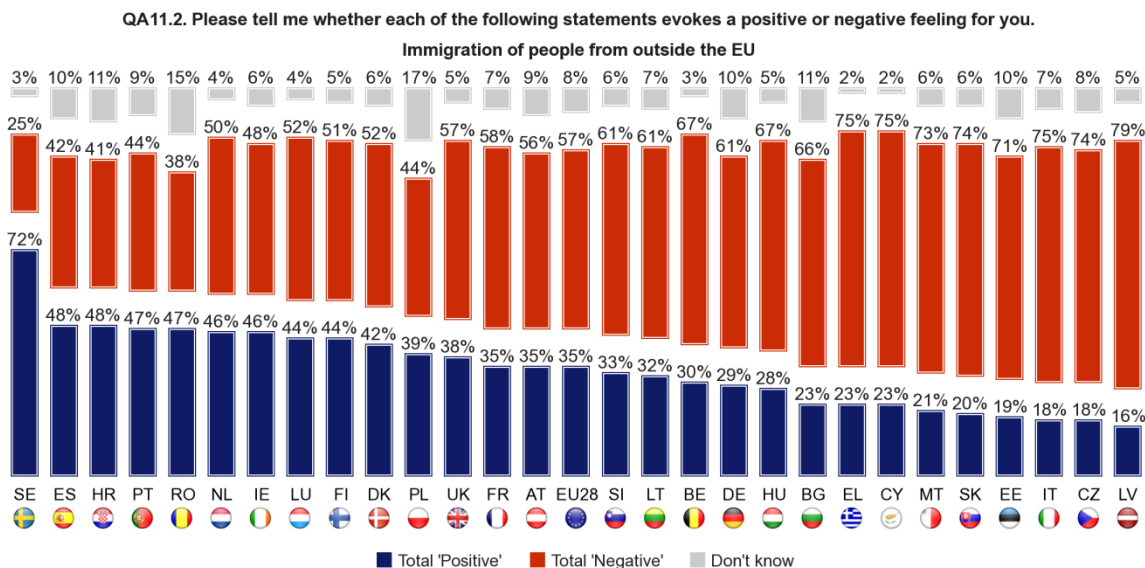
EB82 Autumn 2014

The immigration of people from other EU Member States elicits positive feelings in a large majority of Member States (21). By contrast, negative feelings are in the majority in Hungary, United Kingdom, Slovakia, Cyprus, Italy, Czech Republic and Latvia.



EB82 Autumn 2014

The immigration of people from non-EU countries is only viewed as positive in five countries: in Sweden, very clearly, but also in Spain, Croatia, Portugal and Romania where public opinion is, however, fairly divided. In all other Member States, the majority of people questioned state that the immigration of people coming from outside the EU evokes a negative feeling.



EB82 Autumn 2014

CONCLUSION

The main findings of this project are as follows:

1/ The analysis of changes in European public opinion over more than forty years (from 1973 to 2014) helps identify a number of trends:

- Since 1973, **the feeling that membership of the EU is a good thing** is shared by a clear majority of Europeans.
- In spite of some changes, **the economic context and political changes have little impact on attachment to the European Union.**

2/ However, the major institutional and political moments experienced by the EU and in particular the various successive enlargements of the EU and eight European elections since 1979 have frequently resulted in changes in opinion:

- **The enlargements** have often been occasions when judgments about the EU improved following an initial hardening of opinion. In particular, this was the case with feelings about membership of the EU, as well as confidence and the image of the EU.
- **For the European elections**, the movement is less clear. However, on the day following the European elections, we see a rise in the feeling among European citizens that '[their] vote counts in the EU'. This rise was particularly strong after the elections in May 2014.

3/ Over the period under review, the economic context had a dominant influence on swings in European public opinion. The economic crises have caused a real worsening of opinions about the European Union, especially when they are likely to directly impact the lives of European citizens. This is especially the case with the economic crisis of 2008, which resulted in significant changes to indicators of support for the European Union:

- **The EU's image deteriorates significantly from 2011**, when the economic crisis becomes a public debt crisis of the Member States.
- **Trust in the European Union and its institutions deteriorates** from spring 2010: trust in the EU reaches its lowest level in spring 2012, spring 2013, autumn 2013 and spring 2014.
- The crisis also had a negative impact on the feeling of European citizens that **their voice is not taken into account in the European Union.**
- **Not surprisingly, the indicators of change in the economic situation have also deteriorated**, often in a spectacular manner, since the onset of the crisis. Since autumn 2008, the European economic situation has been judged to be increasingly 'bad' by Europeans even though there has been an improvement in the positive indicator since 2013.

- At the same time, **the projective indicators have also been affected**: between 2009 and 2011, the proportion of Europeans who feel that the national and European economic situations are going to improve in the next 12 months falls, before recovering again from 2011.
- However, an absolute majority of Europeans continue to believe that **their life, their career situation and the financial situation of their household will remain stable over the next 12 months**.
- **The switch to the euro does not seem to have had a major impact on European public opinion**: all we saw was a very slight peak in national feeling just before the launch of the single currency (in 2002).
- By contrast, the majority of Europeans believe that **the euro has not mitigated the negative effects of the crisis**. Nevertheless, it remains a key element of European identity and an important symbol of what the EU means to Europeans.

4/ Obviously the economic crisis has repercussions on the opinion of Europeans, especially regarding the indicators of support for the EU, however we can pick out numerous favourable elements:

- Even though some indicators of support for the EU hardened up during the crisis, **the feeling that what unites citizens of the Member States is more important than what divides them** remains in the clear majority in European opinion: this is the case in 2008, 2009 and 2013.
- 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, even though this feeling remains in the majority, it fell between September 2011 and June 2013.
- Between 2009 and 2014, **the EU was always considered by Europeans as the player best placed to act effectively** against the consequences of the financial and economic crisis.

5/ Europeans are split on the issue of immigration, which has been an increasing concern since 2013: at the end of 2014, a quarter of Europeans believe that this should be a priority of the European Parliament. Furthermore, Europeans make an important distinction between intra-Community immigration and the immigration of people from non-EU countries:

- For more than half of Europeans, the immigration of persons from other EU countries evokes a positive feeling, but a significant minority hold the opposite view. In seven countries, intra-Community immigration evokes something negative.
- By contrast, the immigration of people from outside the EU provokes a negative sentiment for a clear majority of Europeans, this opinion being shared in 23 Member States.
- Europeans are split on the proposition 'immigrants contribute a lot to (OUR COUNTRY)'. In spring 2012 and March 2014, almost half of Europeans agree with this proposition, whilst a significant minority disagree.