



December 2016

EUROPE UPDATE

2016 in review

WELCOME

Europe: the world's second smallest continent. But, with a population in excess of 750 million in more than 50 countries, it has many different dimensions.

This report presents our second selection of Ipsos research on public attitudes in Europe. The 2015 release can be found [here](#).

We have used only studies conducted in more than one European country, with a view to focusing on where attitudes and behaviours across the continent are similar – and where they diverge.

2016 has been a tumultuous year for European citizens and consumers. The studies highlighted here reveal how some of the year's events felt to people on the ground. This is not a comprehensive audit of work – but we have tried to capture the key moments.



THE STATE WE'RE IN

Gloom prevails

Europeans' views on both their national economy and the direction of their country remain unchanged, and largely negative

BREXIT:

Predictions and reactions

Only the Italians and the French saw Brexit coming. The general view is that it will be bad for the UK – and bad for their own country as well

EDENRED WORKPLACE BAROMETER:

Motivation at work

The eleventh wave of the Edenred/Ipsos Workplace Barometer finds employee enthusiasm in developing nations at rather higher levels than in Europe

EUROPEAN AFFLUENT SURVEY

The 2016 Report

The Ipsos Affluent Europe survey examines the views of the most affluent citizens of 21 nations in Europe

WHAT WORRIES THE WORLD?

Introducing the World Worries Index

A new survey from Ipsos Public Affairs compares the major concerns for citizens in 25 nations worldwide

EUROPEAN HOLIDAY BAROMETER:

Off to the beach

A study comparing the holiday patterns of Europeans with their American & Brazilian counterparts

MIGRATION:

European views of the migration crisis

Ipsos Global @dvisor poll explores attitudes to immigrants and refugees across Europe and the world

INFRASTRUCTURE:

A European study of attitudes to infrastructure

Our audit of citizens' perceptions of the built infrastructure in their country reveals surprising pride in some areas of the national built environment





EUROPEAN PUBLIC OPINION Economic Pulse review

The European public starts 2017 in a similar frame of mind to a year ago: gloom prevails

Amongst EU publics, perceptions of how things are going in their country – including how the national economy is performing – have shifted little over 2016.

Analysis of 11 months of data for nine EU countries from the Ipsos Economic Pulse series confirms that, in a year marked by political and economic shocks, most Europeans remain negative about their national prospects.

Views of the *state of the national economy* have shifted in only two countries – Britain and Belgium – whilst satisfaction with the way things are going has changed in Belgium and France alone. In each of these cases where there has been a change in view, the direction of travel is negative.

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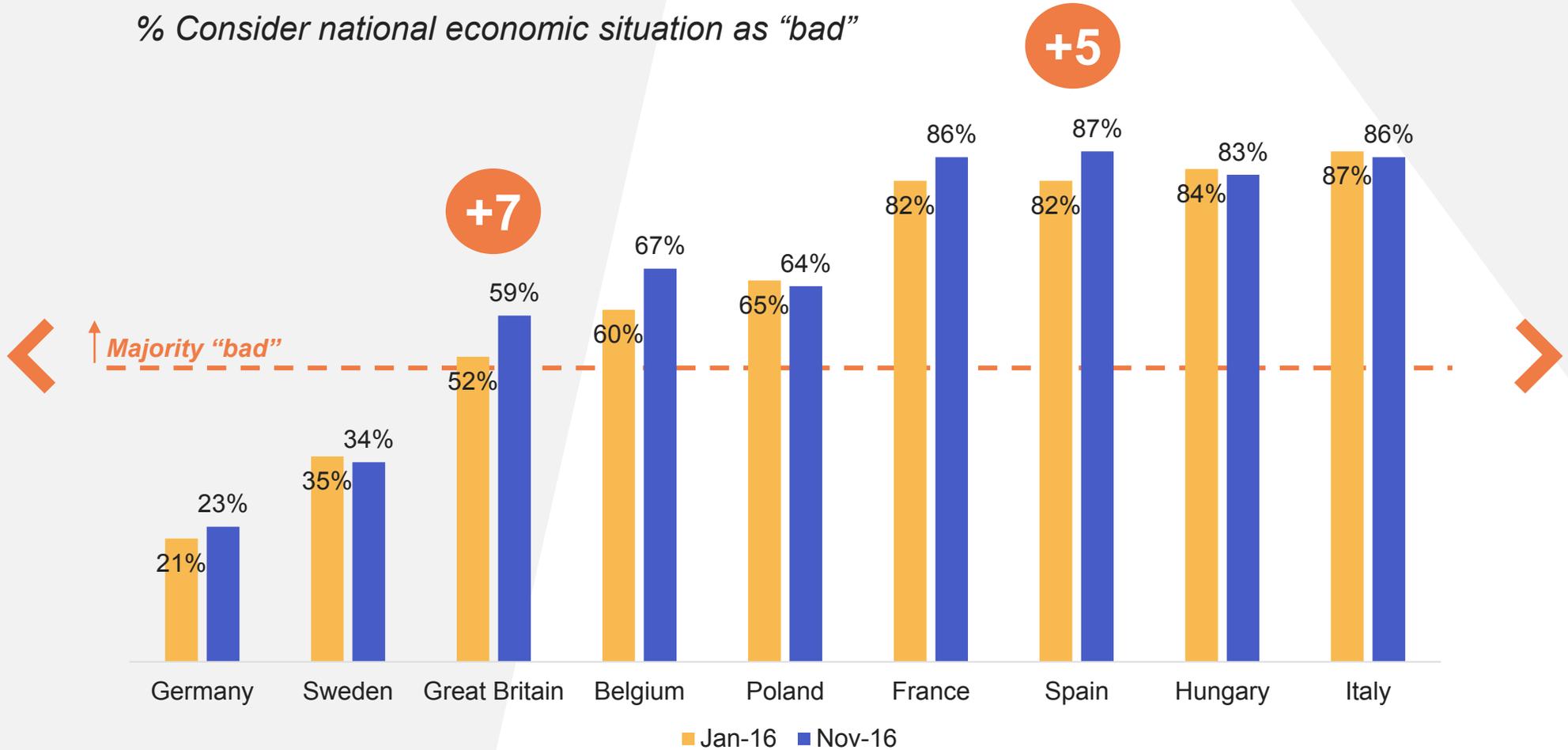
GAME CHANGERS





EUROPE #1: Economic negativity is “normal”

% Consider national economic situation as “bad”





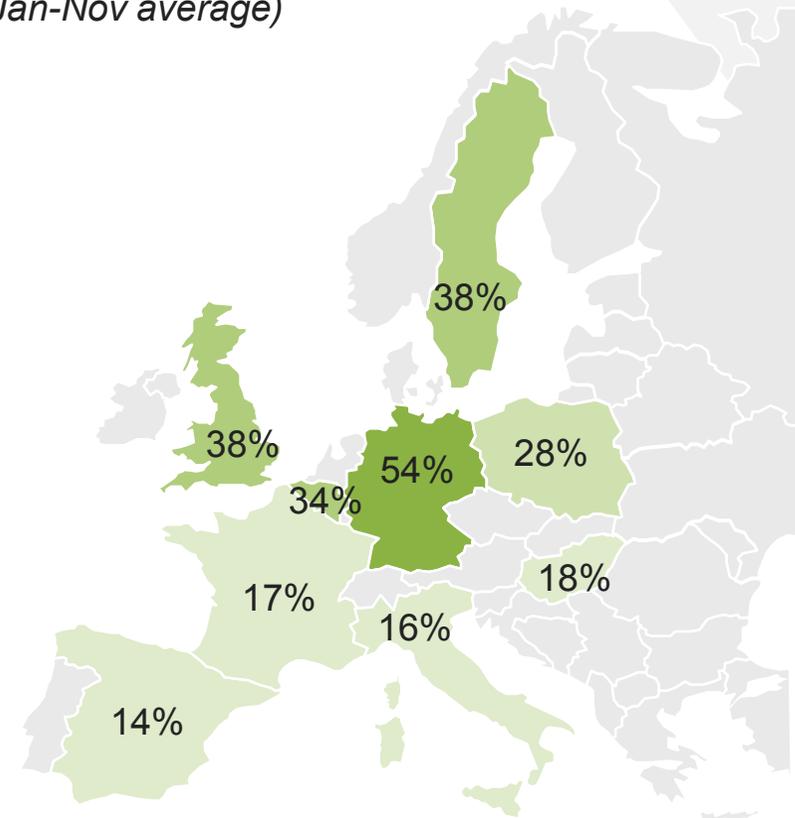
EUROPE #2: Only the Germans are satisfied with the way things are going

Satisfaction with how things are going has moved only in France and Belgium

Significant differences highlighted

	Jan 2016	Nov 2016	Change
Germany	57%	60%	+3
Great Britain	43%	40%	-3
Belgium	39%	33%	-6
Sweden	33%	33%	0
Poland	27%	28%	+1
France	21%	17%	-4
Hungary	18%	15%	-3
Spain	15%	14%	-1

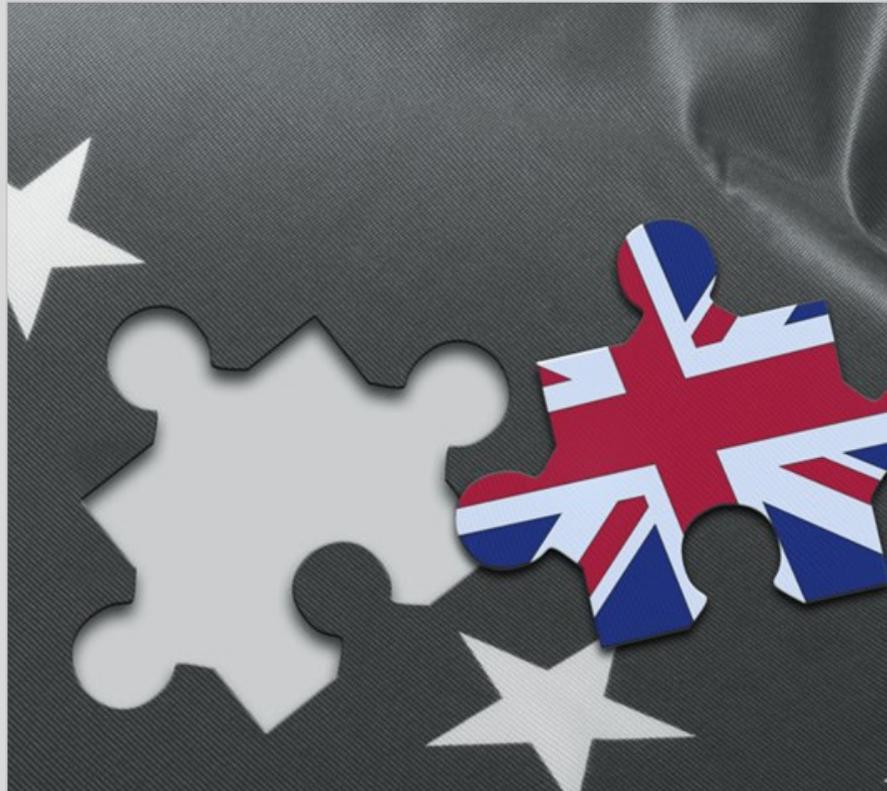
Proportion who are satisfied with how things are going in their country (Jan-Nov average)





EUROPE #3: EU publics end 2016 much as they started it





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BREXIT

Predictions and reactions

Europeans give their views on the consequences of the UK's vote to leave the EU

We take a look back at two international polls carried out by Ipsos Global @dvisor either side of the UK's vote to leave the European Union.

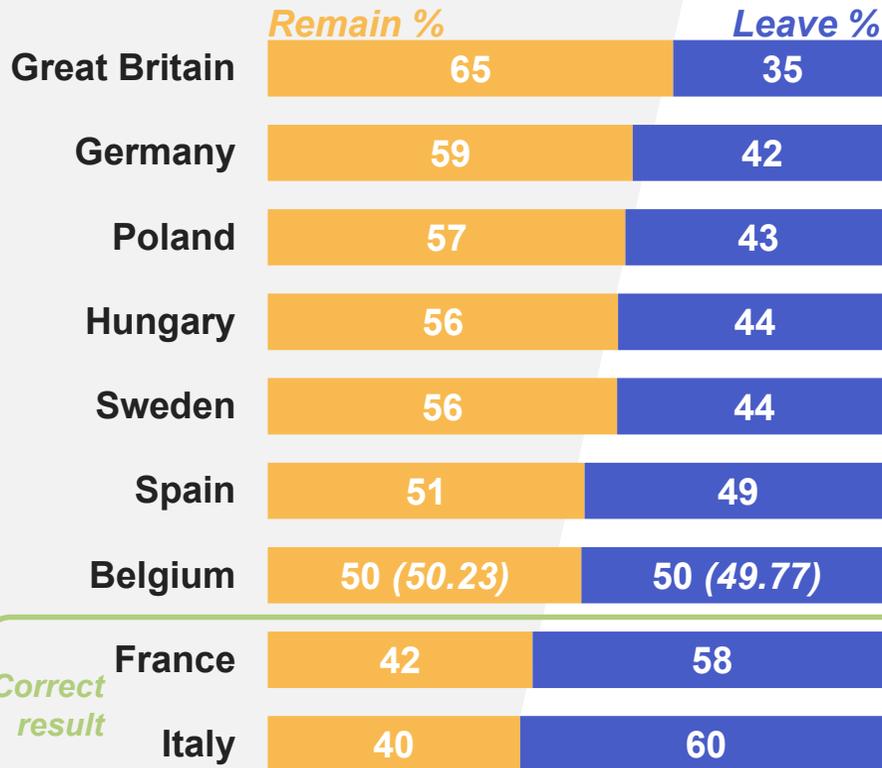
Four immediate headlines spring out:

1. Only the French and Italians saw Brexit coming
2. Europeans see Brexit as a lose-lose proposition for both the UK and EU
3. The German public were particularly surprised by the vote to leave
4. European publics are split on whether to take a conciliatory or punitive approach to negotiations with Britain: the French and Belgians take the hardest line



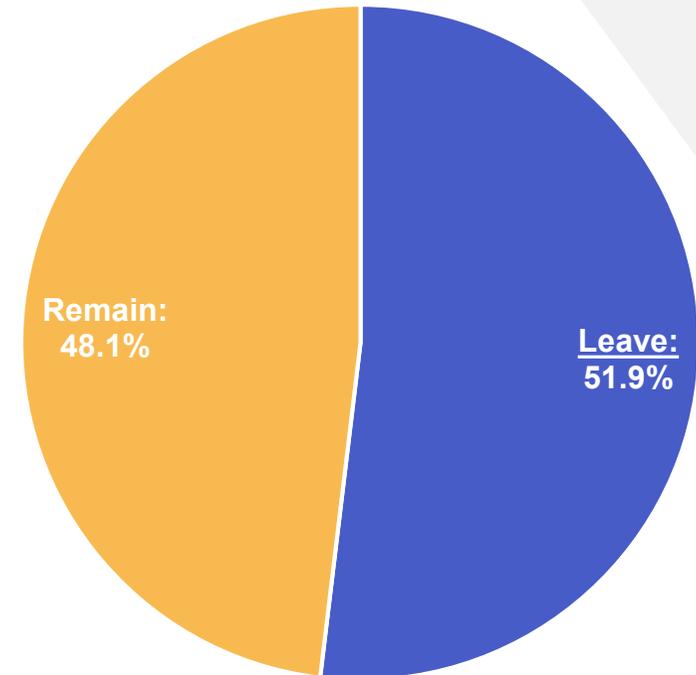
BREXIT #1: Pre 23 June few expected Brexit – especially the British

Thinking about Britain's referendum on European Union membership, which of the following outcomes do you think is most likely?



Correct result

Referendum result:

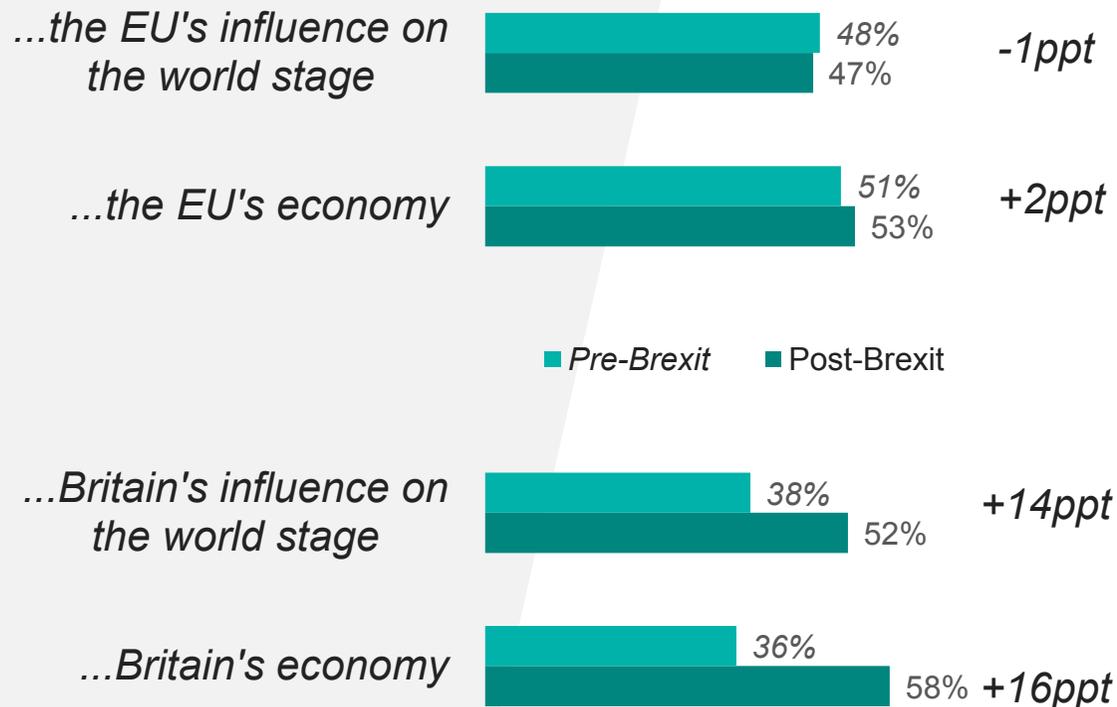




BREXIT #2: Post 23 June, many re-evaluated how it would impact Britain

Proportion agreeing that Brexit would/will be negative for...

Change:



55%

Thought Brexit was the wrong decision for Britain

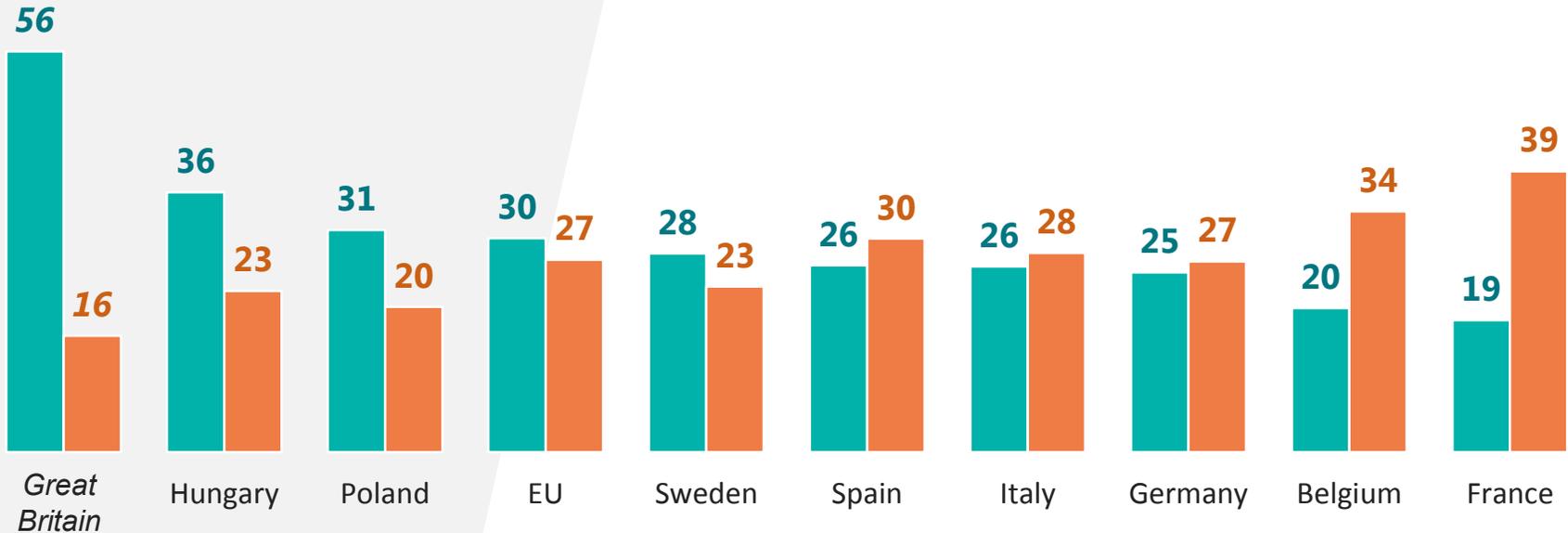


BREXIT #3: EU countries divided on how to approach negotiations

The EU should...

...Offer favourable terms to reduce negative impact on economy (% agree)

...Offer unfavourable terms to discourage other countries from leaving (% agree)





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EDENRED/IPSOS 2016 Workplace Barometer

The eleventh edition of the Edenred/Ipsos Workplace Barometer finds greater worker enthusiasm in developing nations

This survey has tracked employee views of their wellbeing in the workplace since 2006. This year's findings show seven in ten employees are satisfied with their well-being at work.

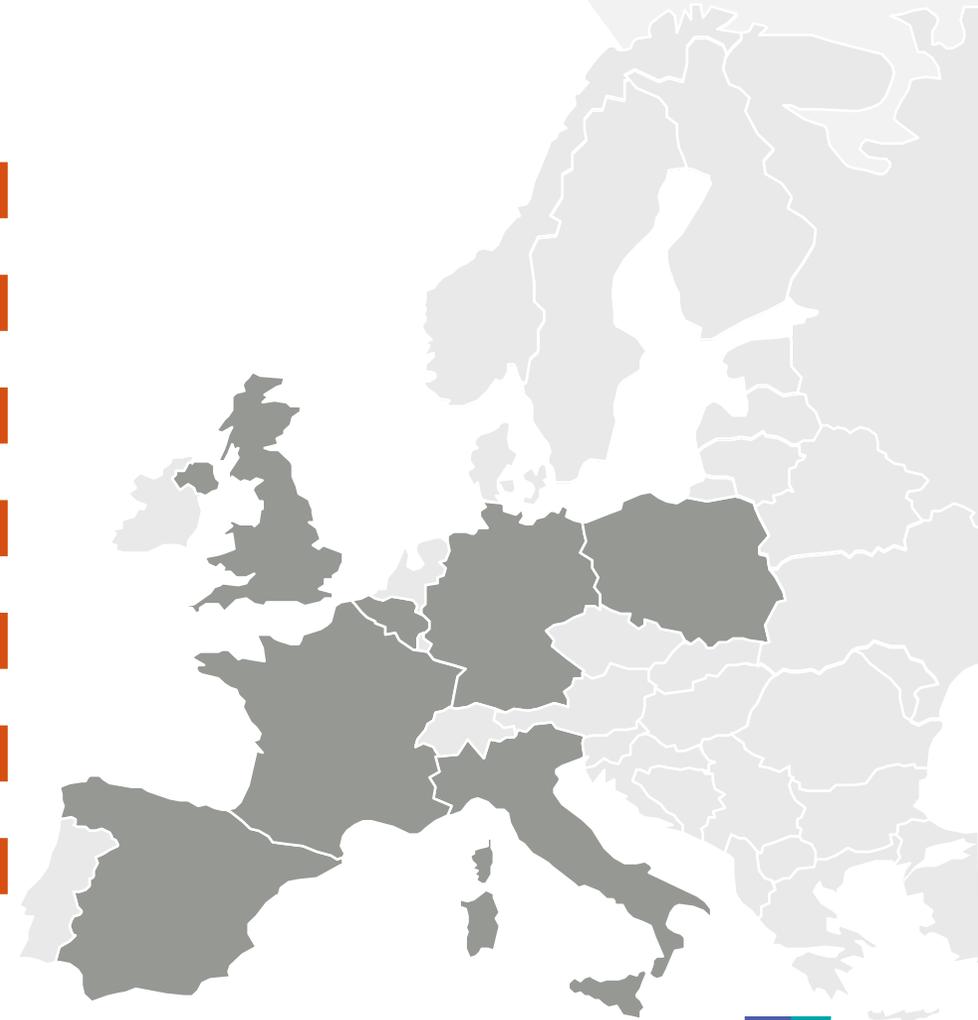
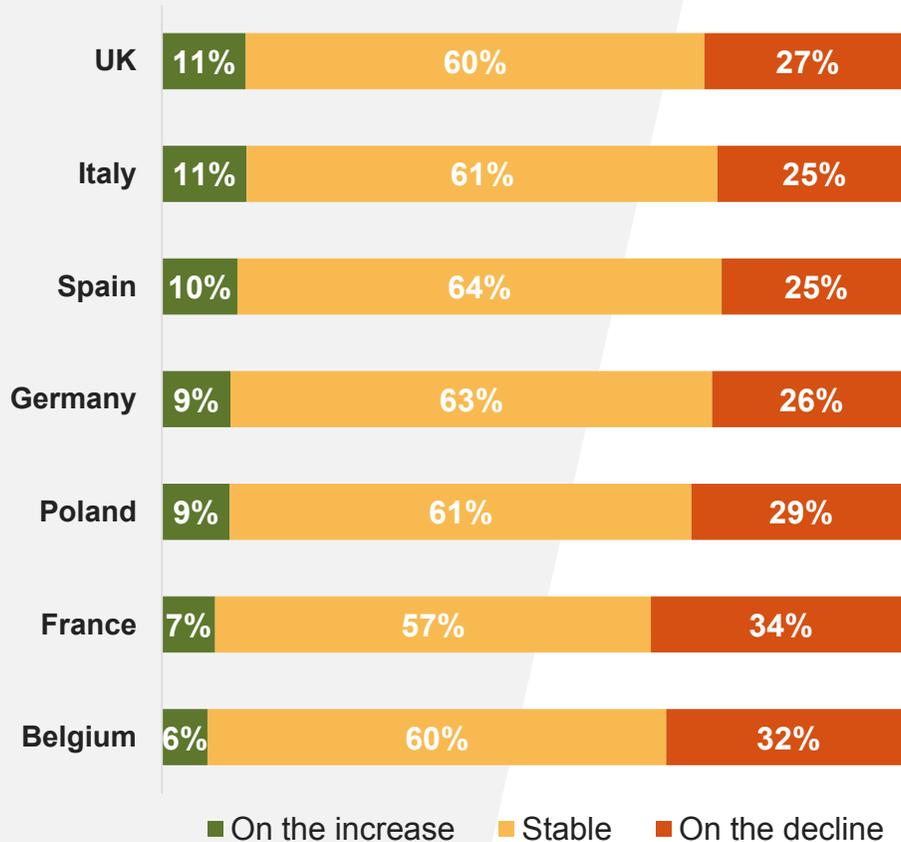
In the EU countries surveyed (Italy, Spain, Germany, France, the UK, Belgium and Poland) enthusiasm for work is rather less pronounced than in countries such as Turkey and Brazil. The norm for the European employees is to say their motivation is "staying about the same" or "on the decline".

Within EU countries, Germans tend to report the highest satisfaction with various aspects of their wellbeing at work, whilst those in Italy, Spain, France and Poland are less satisfied.



WORKPLACE #1: Enthusiasm is stable or increasing for most

Q: *Would you say your motivation at work is on the increase, stable, or on the decline?*



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© Ipsos Version 1 Source: *Edenred-Ipsos Barometer 2016.*
Base: *c.800 interviews per country*

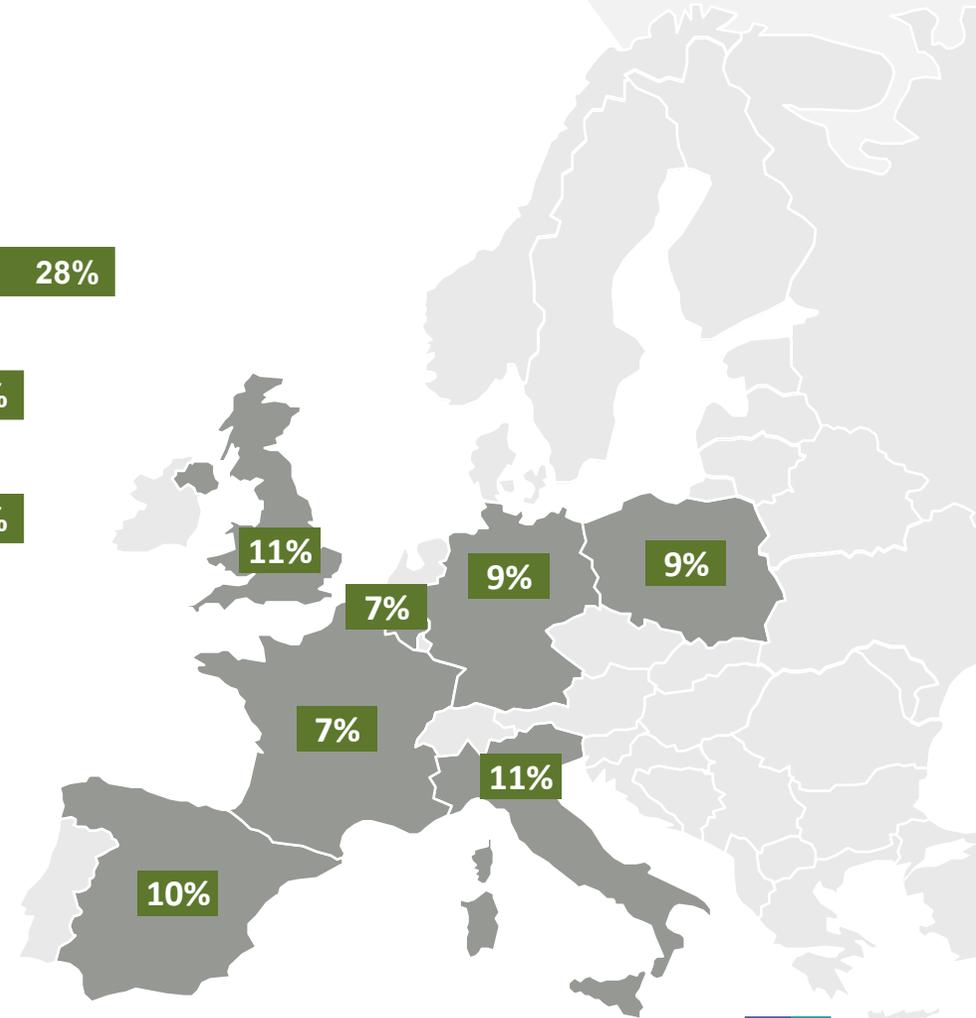
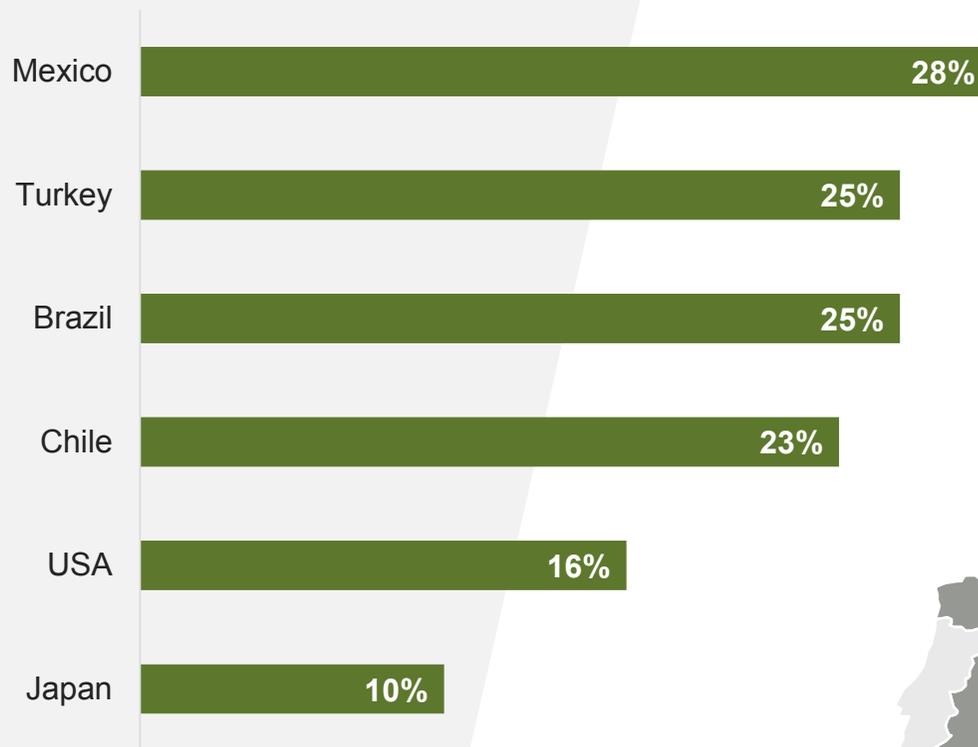




WORKPLACE #2: EU workers are less enthusiastic than others

Would you say your motivation at work is on the increase, stable, or on the decline?

% “on the increase”



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© Ipsos Version 1 Source: Edenred-Ipsos Barometer 2016.

Base: c.800 interviews per country



WORKPLACE #3: Employee wellbeing is higher in Germany and UK

Do you agree with the following statements?

% "Yes, absolutely":	UK	Germany	France	Belgium	Poland	Italy	Spain
...you are satisfied with your work/life balance	23%	24%	18%	21%	17%	13%	16%
...you enjoy coming into work in the morning	19%	23%	16%	19%	13%	13%	16%
...you feel respected by your management	27%	24%	15%	18%	18%	21%	23%
...you have an interesting job	27%	32%	22%	22%	20%	22%	18%



AFFLUENT EUROPE

Ipsos Affluent Survey 2016

This survey examines the behaviours – and attitudes – of the most affluent citizens of 21 nations in Europe

Understanding the behaviour of Europe's affluent is crucial to marketers. Not only do they have the majority of disposable income in the region, but as early adopters and opinion formers, where they lead, others follow. However, it would be a mistake to think of them as in anyway average.

Key findings from the report:

- 'Millennials' still love print; they read 53 minutes a day vs. 51 minutes for baby boomers
- Millennials spend more time online than 'Uploaders' but are more passive
- Smartphone ownership is approaching universal; 84% of affluent Europeans have one
- Technology is becoming more important for 'Baby Boomers'
- 'Globe trotters' are true to their name and are the heaviest international media consumers

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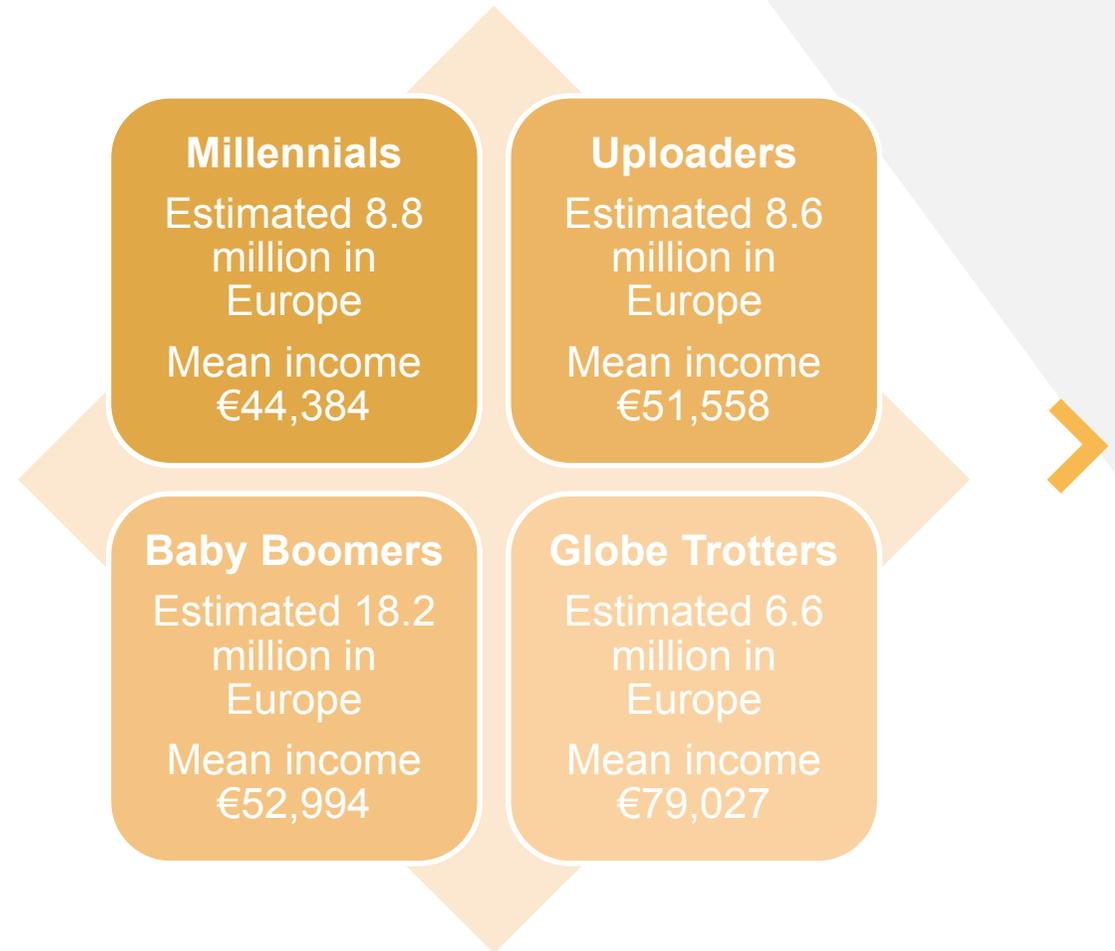
AFFLUENCE #1: Key segments in the European affluent universe

There are an estimated 52.2 million affluent consumers in the 21 European countries covered by the Affluent survey.

Millennials are 17 per cent of this market.

Other key segments are:

- **Baby boomers** (aged 52-70)
- **Uploaders** (those who contribute to online content >15 minutes per day)
- **Globe Trotters** (those making 6+ international air trips per year)

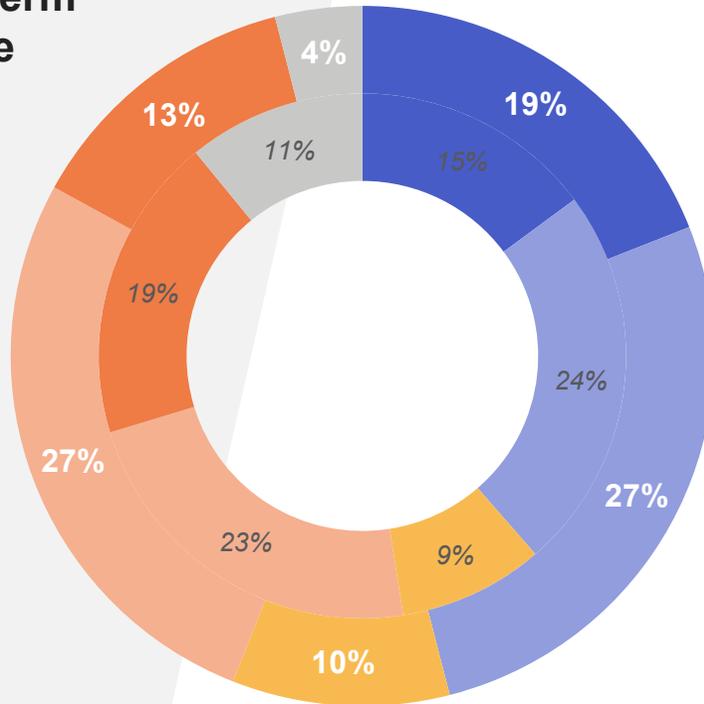




AFFLUENCE #2: Better-off Europeans more internationalist and pro-EU

Do you think your country's long-term policy should be to...

- ...work for the formation of a single European government
- ...stay in the EU and increase its powers
- ...leave things as they are
- ...stay in the EU and reduce its powers
- ...leave the EU
- Don't know



Inner ring: non-affluent consumers
Outer ring: affluent consumers

Half (46%) of affluent people were in favour of “more Europe”, compared to four in ten (39%) of others

- One in five (19%) affluent consumers were in favour of working towards a single European Government

26%

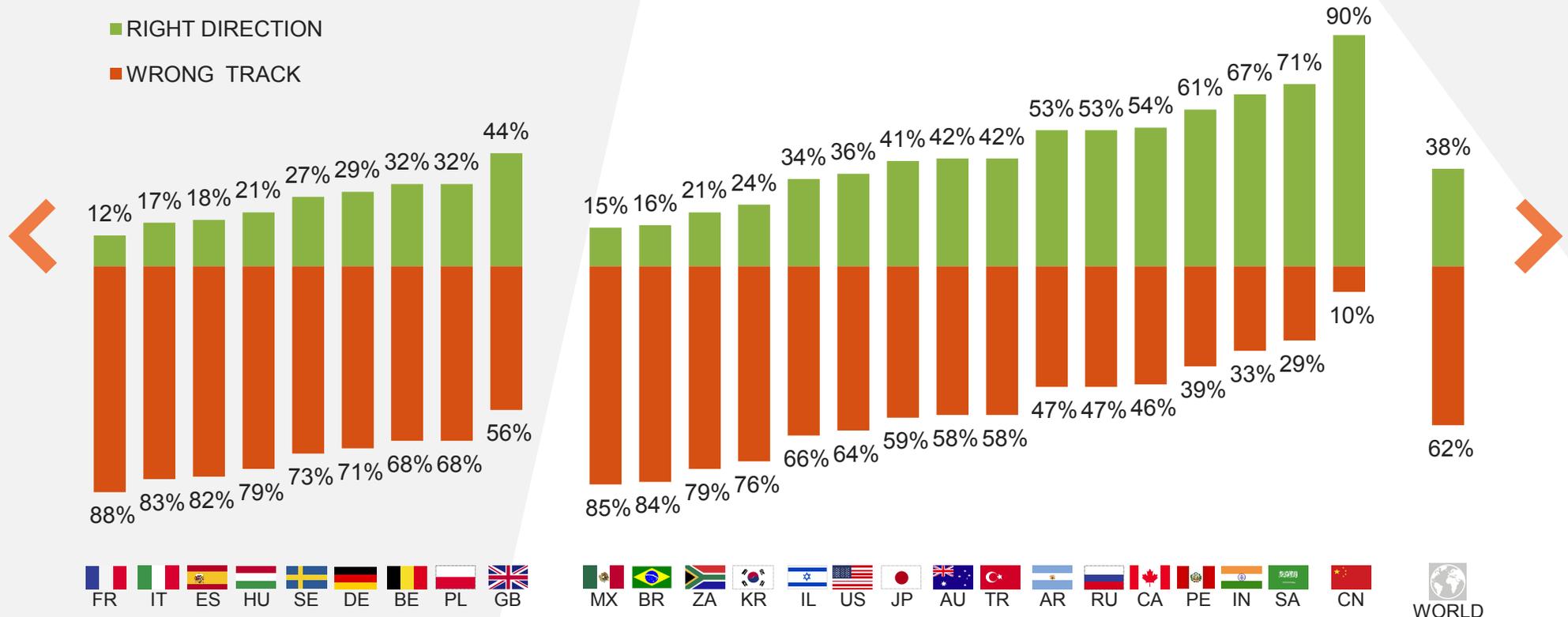
of Europe's affluent population currently live abroad



WORRIES #1: EU countries among most pessimistic on way things are going

Generally speaking, would you say things in this country are heading in the right direction, or are they off on the wrong track?

■ RIGHT DIRECTION
■ WRONG TRACK



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Source: Ipsos World Worries Index

Base: 18,014 adults aged 16-64 in 25 participating countries, August 26th - September 9th 2016

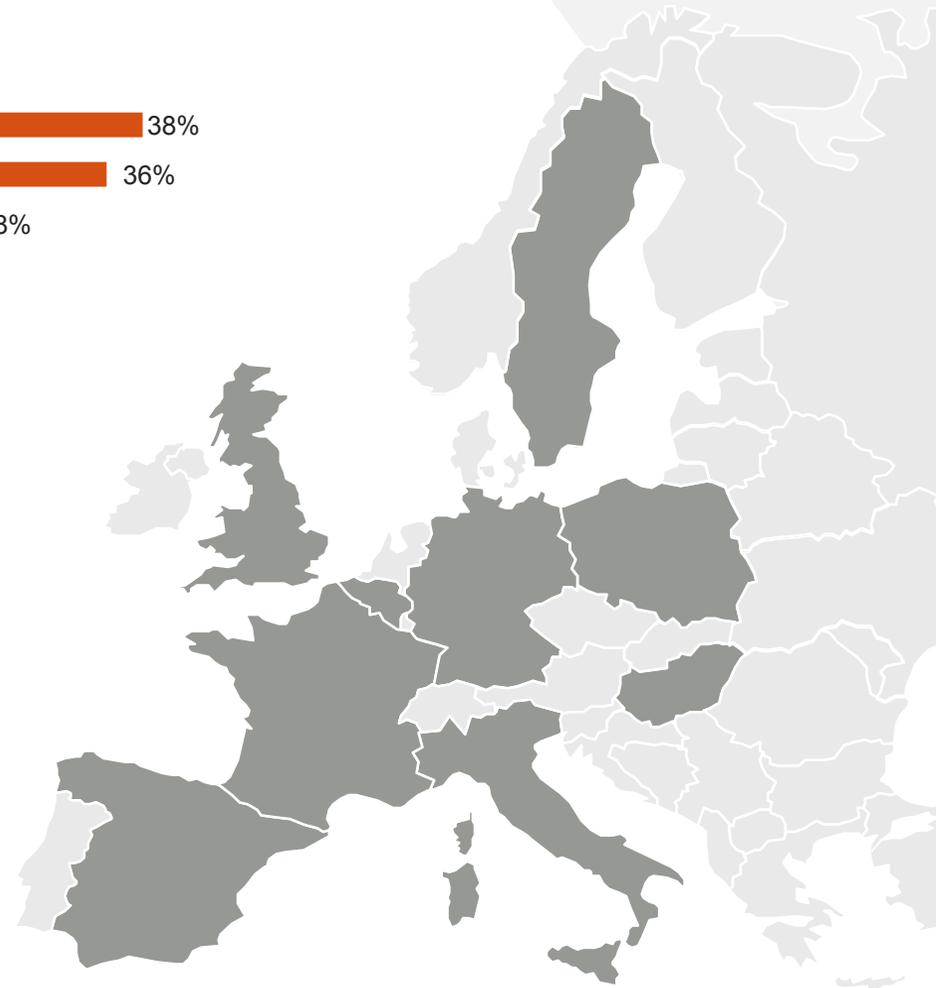
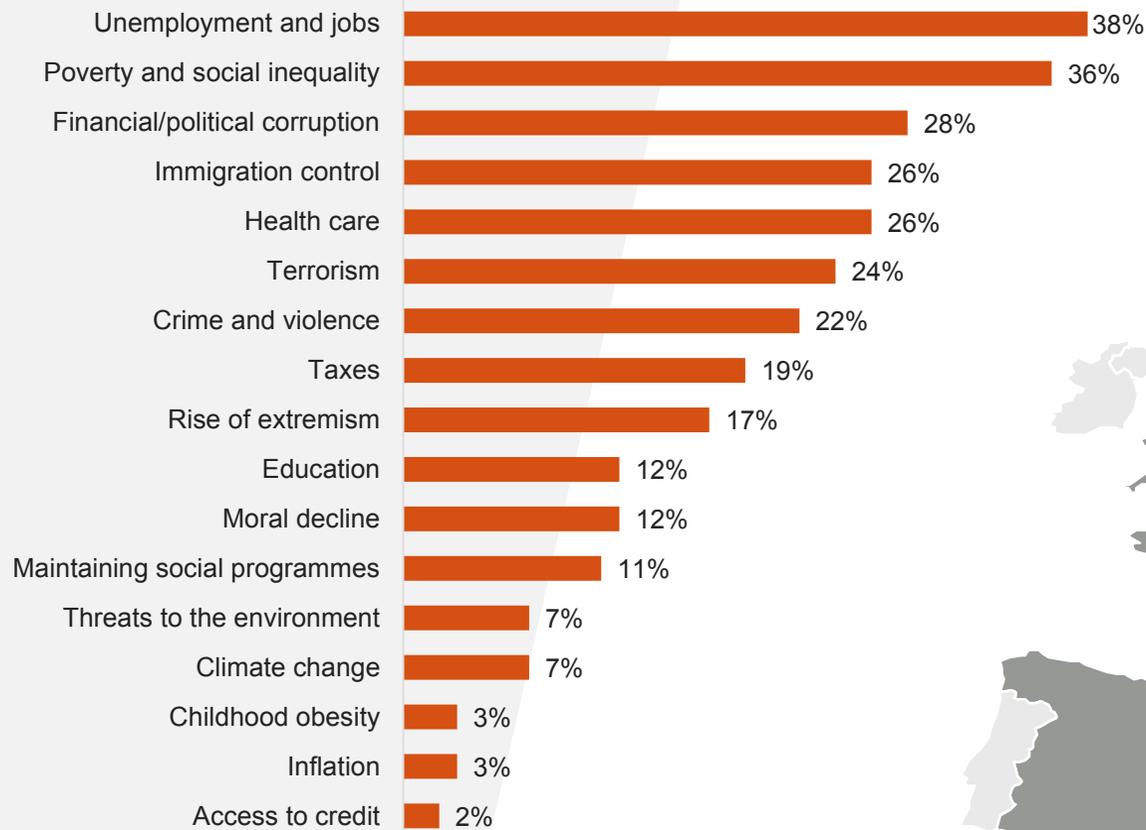
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WORRIES #2: Unemployment is the biggest EU issue overall

Which three of the following topics do you find the most worrying in your country? – EU Member States

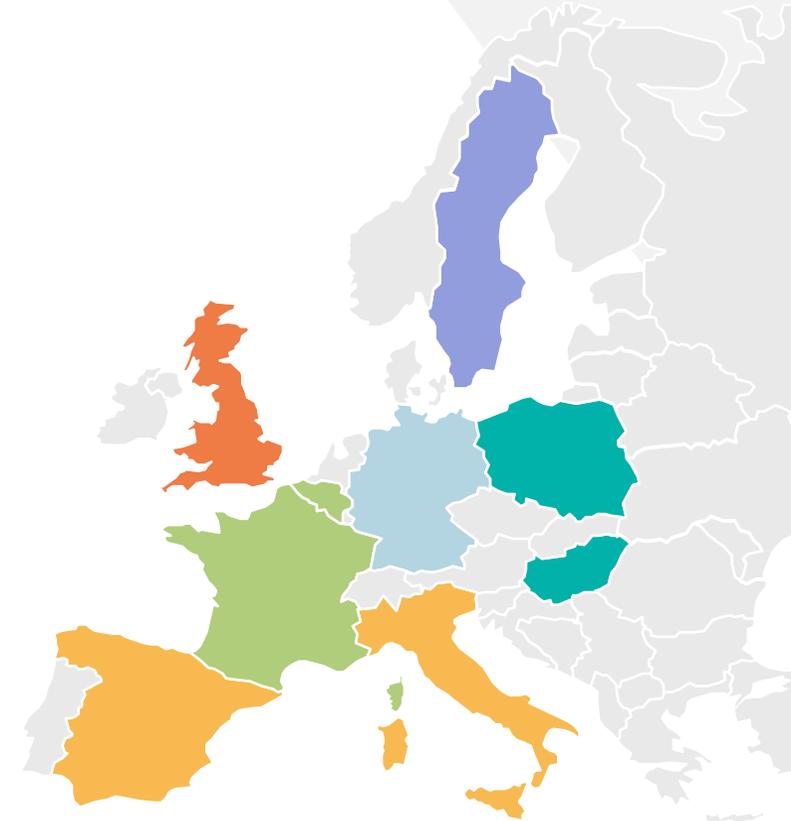




WORRIES #3: But priorities differ A LOT by country

Which three of the following topics do you find the most worrying in your country? – EU Member States

	First	Second	Third
Great Britain	Immigration – 42%	Healthcare – 34%	Terrorism – 31%
France	Terrorism – 55%	Unemployment – 48%	Taxes – 28%
Spain	Unemployment – 70%	Corruption – 53%	Inequality – 33%
Belgium	Terrorism – 38%	Inequality – 35%	Unemployment – 34%
Italy	Unemployment – 66%	Taxes – 40%	Corruption – 34%
Sweden	Crime and violence – 42%	Immigration – 33%	Unemployment – 28%
Germany	Inequality – 45%	Immigration – 41%	Terrorism – 31%
Hungary	Healthcare – 59%	Corruption – 58%	Inequality – 56%
Poland	Healthcare – 46%	Corruption – 45%	Inequality – 37%





EUROPEAN HOLIDAYS 2016 summer holiday plans

The Europ Assistance holiday barometer measures continental Europeans' holiday plans against Americans and Brazilians

What motivates people to go on holiday? And when, and where?

Focusing on people from mainland Europe, the US and Brazil, this survey paints a picture of where people go for their holidays – and how they spend their time.

It's the French, for example, who enjoy the longest breaks, with their average 2.5 week summer holidays contrasting with the average US vacation of just 1.6 weeks.

The French, Italians and Spanish all tend to holiday in their own country, with beach holidays most popular.

Germans tend to travel further afield, something which may explain why 80% say they will "log off" completely while off work, the highest of any country. In the US, this figure stands at just 53%.

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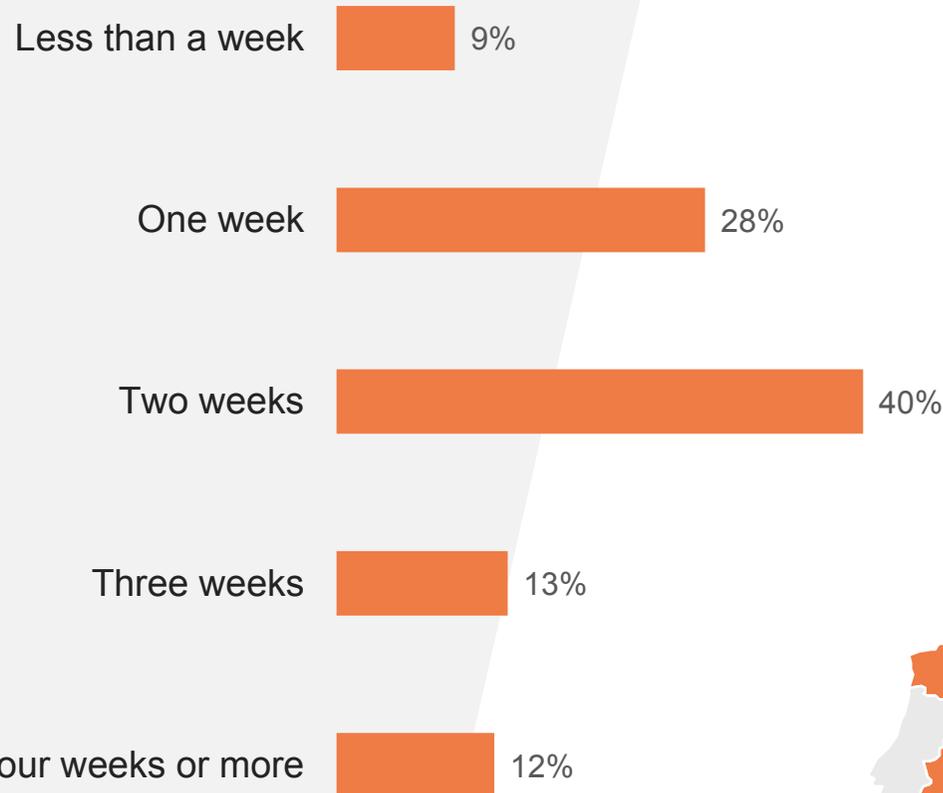
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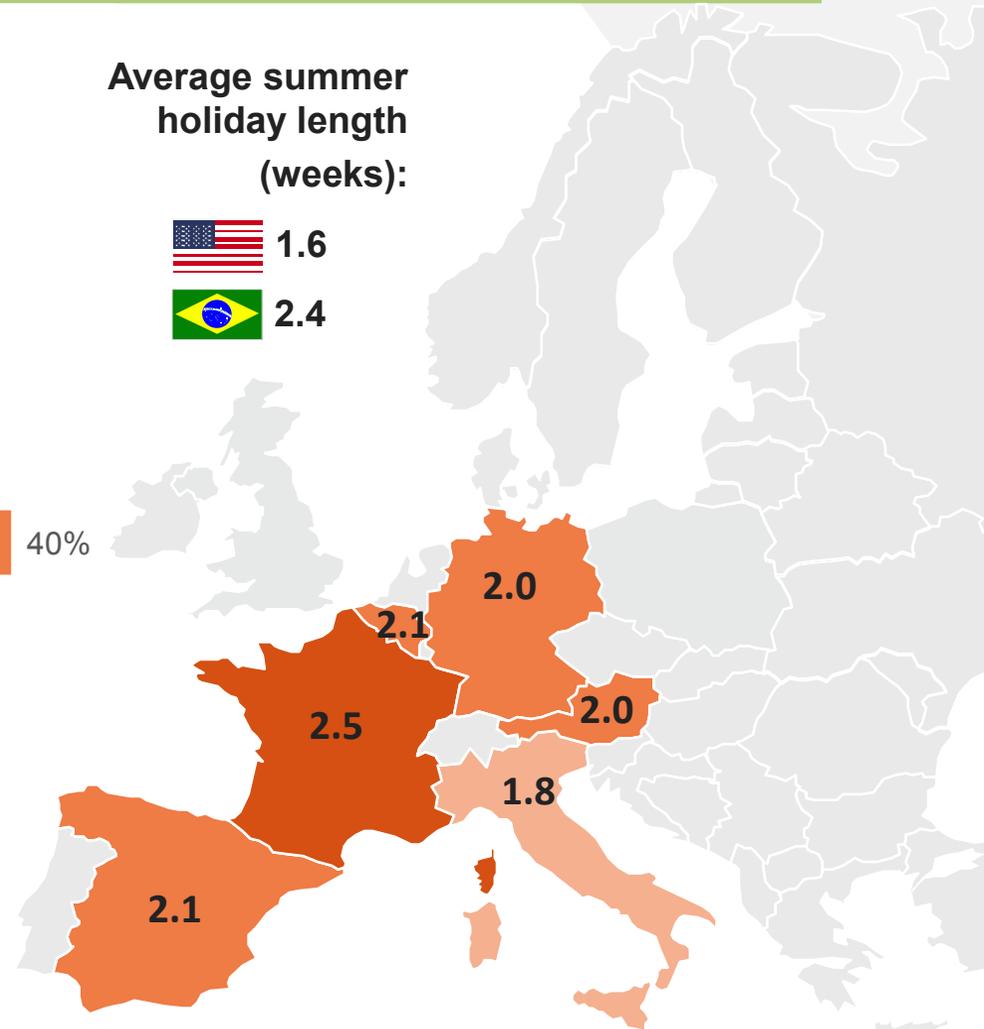


HOLIDAYS #1: The average European summer holiday was 2 weeks

Summer holiday duration:



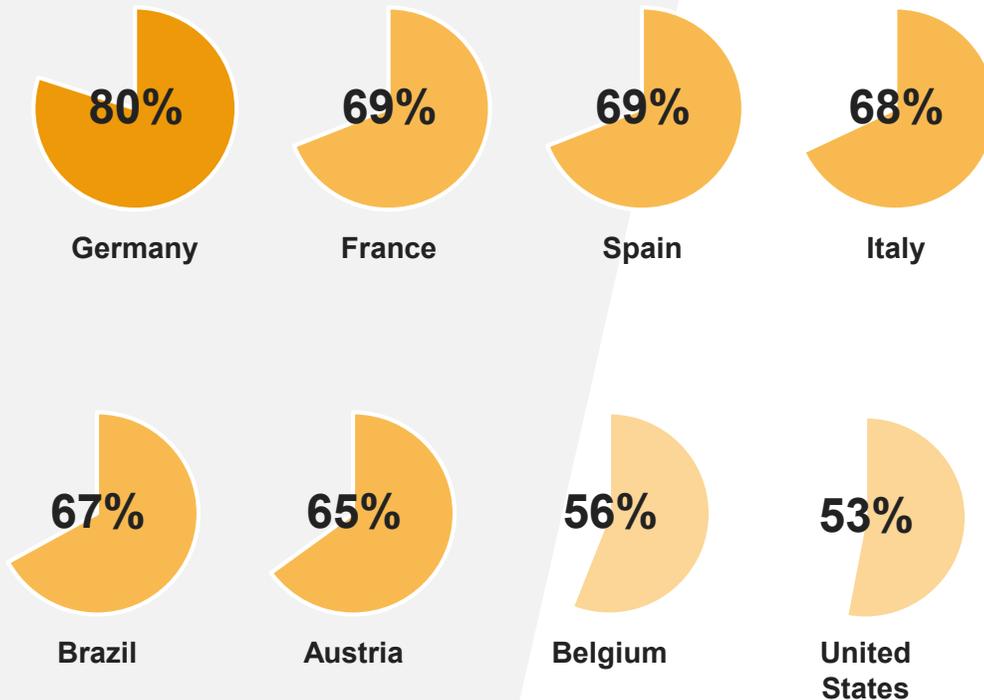
Average summer holiday length (weeks):



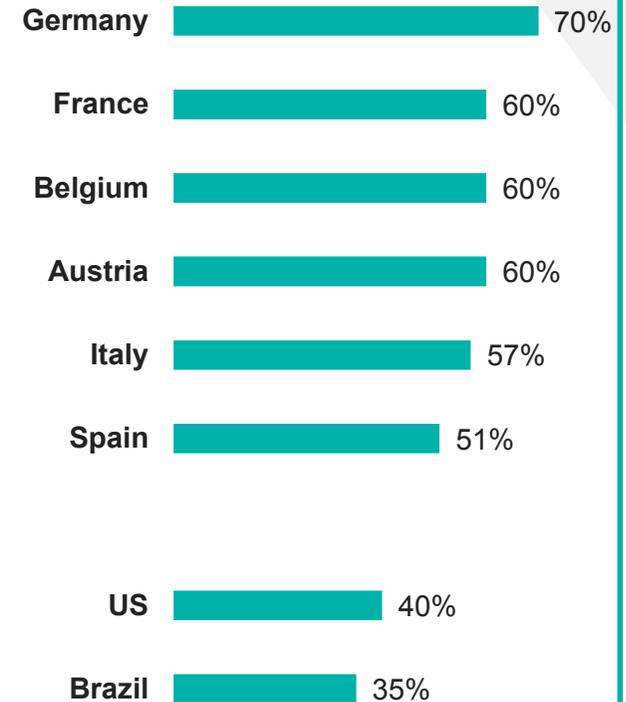


HOLIDAYS #2: Europeans more likely to switch off on holiday than Americans

% who will “completely log off from work”



% who will use social networks “less than usual” on holiday





MIGRATION

A continent under pressure?

An Ipsos Global Advisor poll examined attitudes towards immigrants and refugees across Europe and the world

Like 2015, 2016 has been a year of vast movements of people. In Turkey alone there are estimated to be more than three million displaced people. Hundreds of thousands have headed for Europe too, primarily through Italy and Greece.

Against this context, this Ipsos Global Advisor poll finds widespread negativity around immigrants and immigration in most countries – in Europe most agree that there are “too many” immigrants and that they put “too much pressure” on public services.

Taking a longer view, few say that immigration has had a favourable impact on their country: the British are most likely to say so, with 35% saying the overall balance sheet is positive.

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MIGRATION #1: Half believe there are “too many” migrants

July 2016 % agree – “There are too many immigrants in our country”

		Oct 2015	July 2015	2014	2013	2011
Total	49%	46%	50%	48%	51%	52%
Turkey	85%	82%	92%	83%	76%	51%
Italy	65%	61%	71%	67%	65%	67%
Russia	64%	63%	69%	73%	83%	77%
Belgium	60%	60%	61%	63%	70%	72%
France	57%	51%	60%	58%	57%	52%
Hungary	55%	50%	54%	46%	50%	50%
Germany	50%	48%	43%	51%	47%	53%
Great Britain	49%	53%	60%	60%	64%	71%
Sweden	43%	41%	43%	37%	33%	46%
Spain	40%	44%	48%	48%	56%	67%
Poland	33%	35%	32%	24%	28%	29%

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Source: Ipsos Global Advisor

Base: 16,040 adults aged 16-64 in 22 countries, July 2016

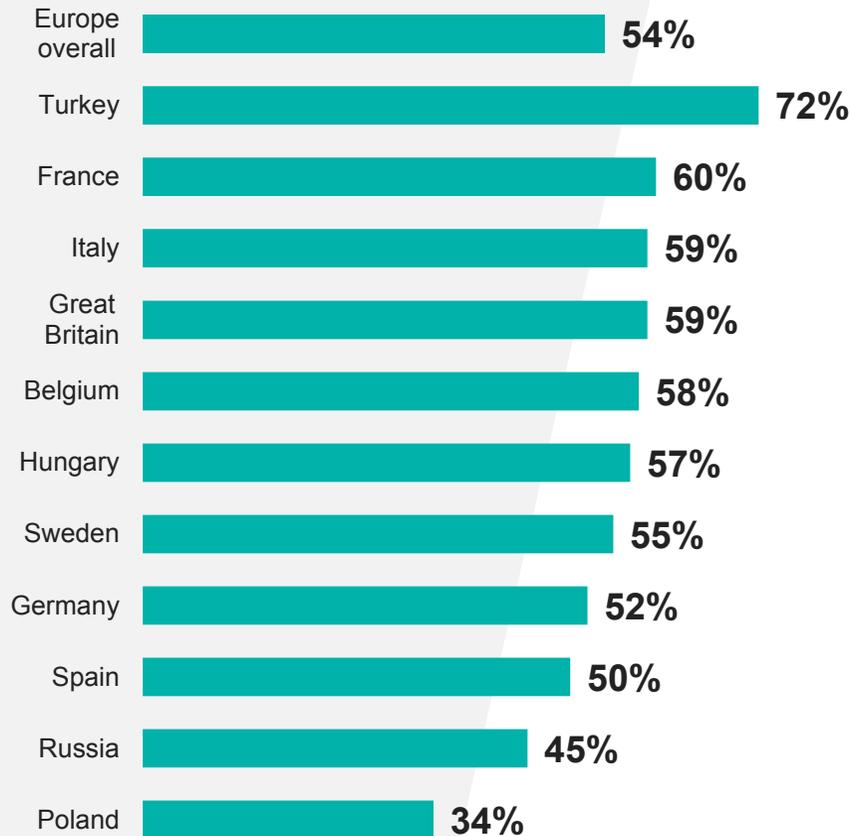




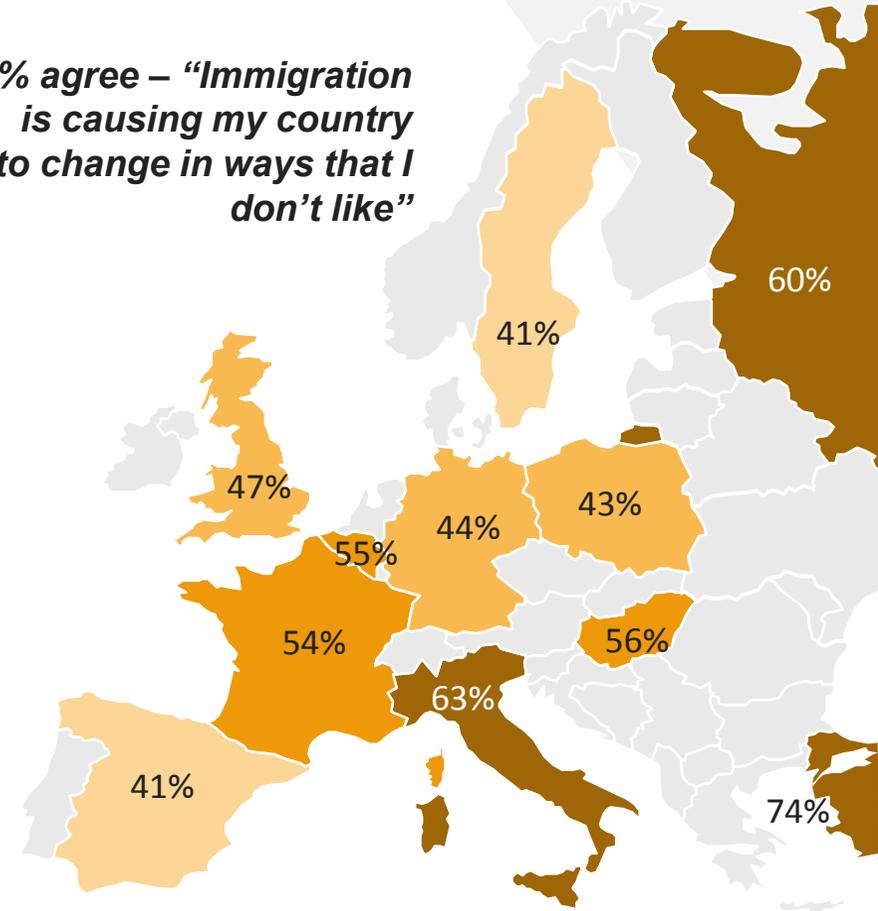
MIGRATION #2: Wide concern about immigration pressuring public services

“Immigration has placed too much pressure on public services in my country”

% agree:



% agree – “Immigration is causing my country to change in ways that I don’t like”



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Source: Ipsos Global Advisor

Base: 16,040 adults aged 16-64 in 22 countries, July 2016

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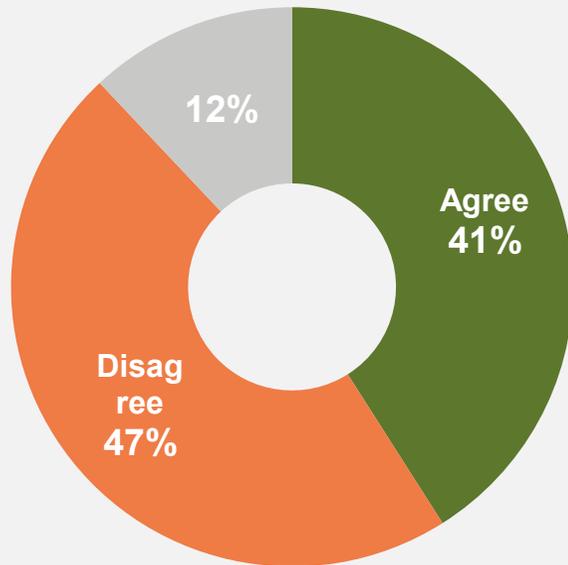


MIGRATION #3: Europe-wide views on migration are split

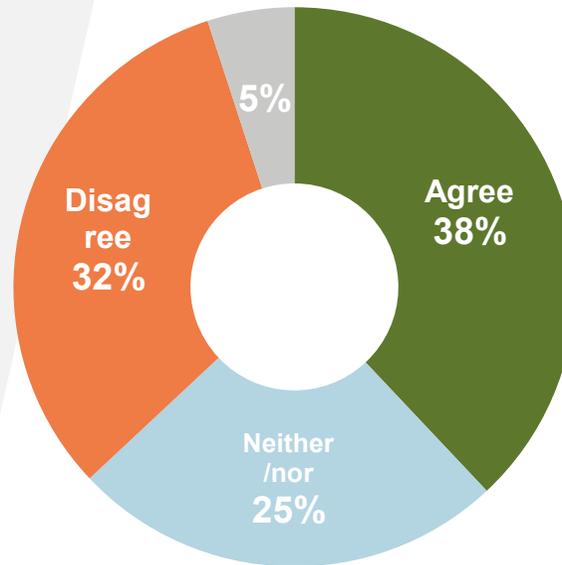
“We must close our borders to refugees entirely—we can’t accept any at this time”

“Immigrants in [country] have made it more difficult for [nationality] people to get jobs

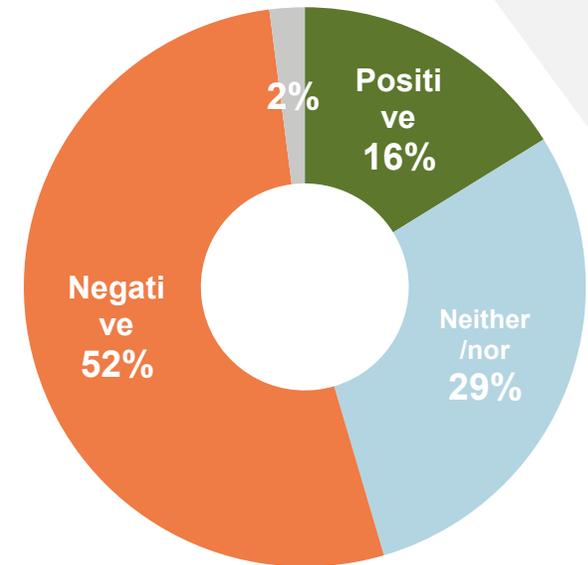
“Would you say that immigration has generally had a positive or negative impact on [country]?”



High – Turkey (64%)
Low – Spain (24%)



High – Turkey (78%)
Low – Sweden (25%)



Most positive – Great Britain (35%)
Most negative – Turkey (6%)



INFRASTRUCTURE European perspectives

Our new global study into citizens' perceptions of their country's national infrastructure reveals pride in some areas – and irritation in others

This research covered a range of infrastructure categories: road, rail and air networks, utilities such as energy and water, as well as housing and broadband.

Around the world, the highest ratings go to:

- Airports: 67% ('very/fairly good')
- High speed broadband: 54%
- Water supply and sewage: 53%

Meanwhile, the lowest scores are given to:

- New housing supply: 41%
- Nuclear energy: 32%
- Flood defences: 29%

The countries which are most critical about their national infrastructure are Brazil (62%), Hungary (51%) and Argentina (46%).

More on the European picture overleaf...

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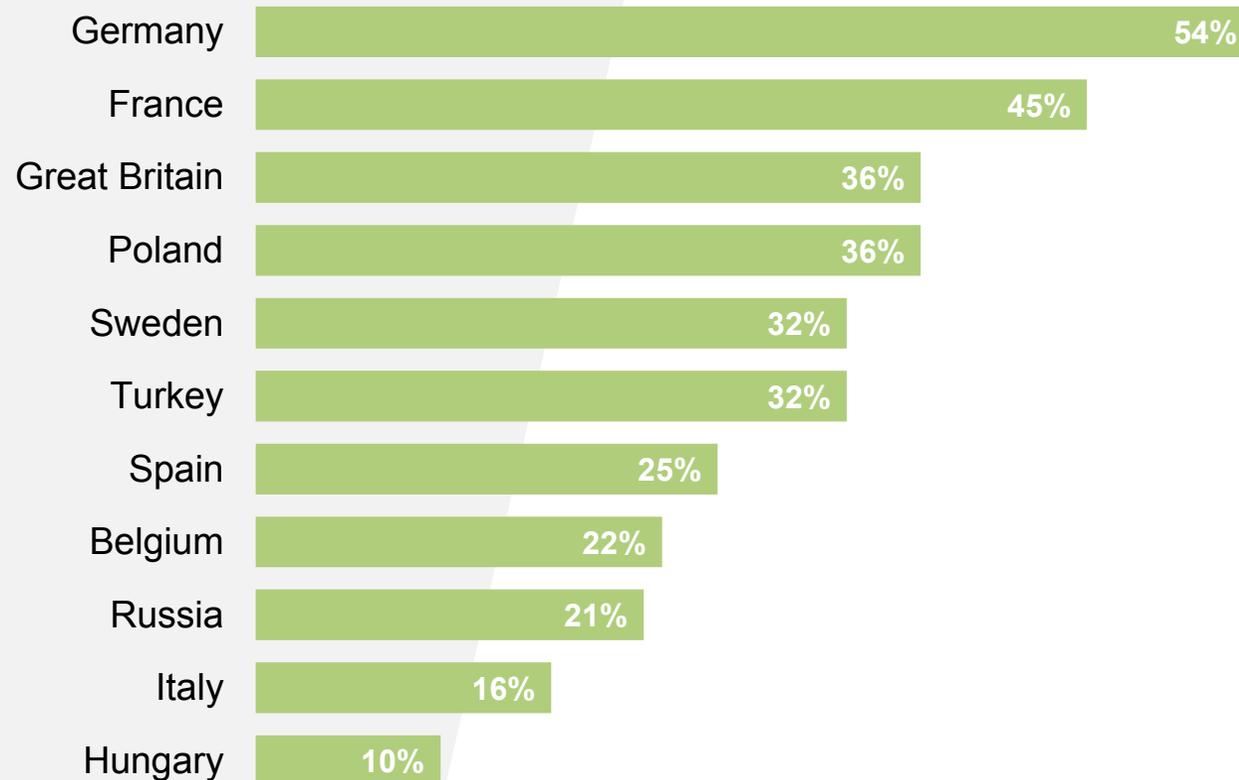
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INFRASTRUCTURE #1: Satisfaction varies widely across Europe

Overall, how satisfied or dissatisfied are you with [COUNTRY'S] national infrastructure? - % "satisfied"





INFRASTRUCTURE #2: Greatest pride in infrastructure differs across Europe

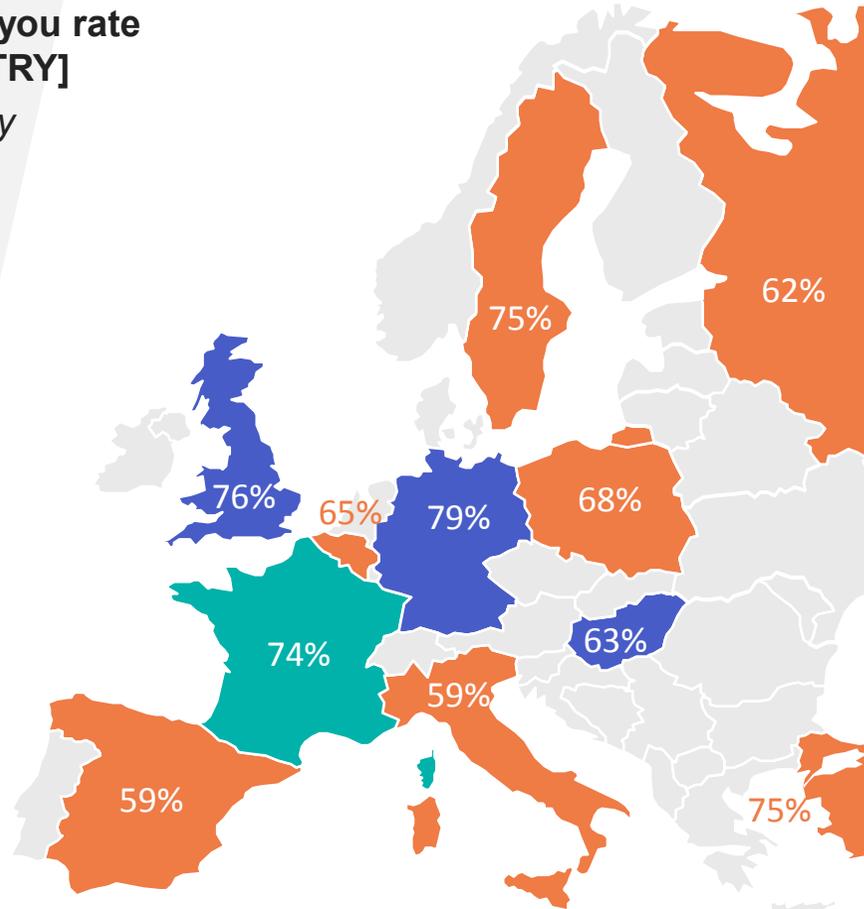
Please indicate how good or poor you rate the current quality of ... in [COUNTRY]

Top infrastructure category by country

- Airports
- Water and sewerage
- Motorway/major road network

Lowest rated infrastructure:

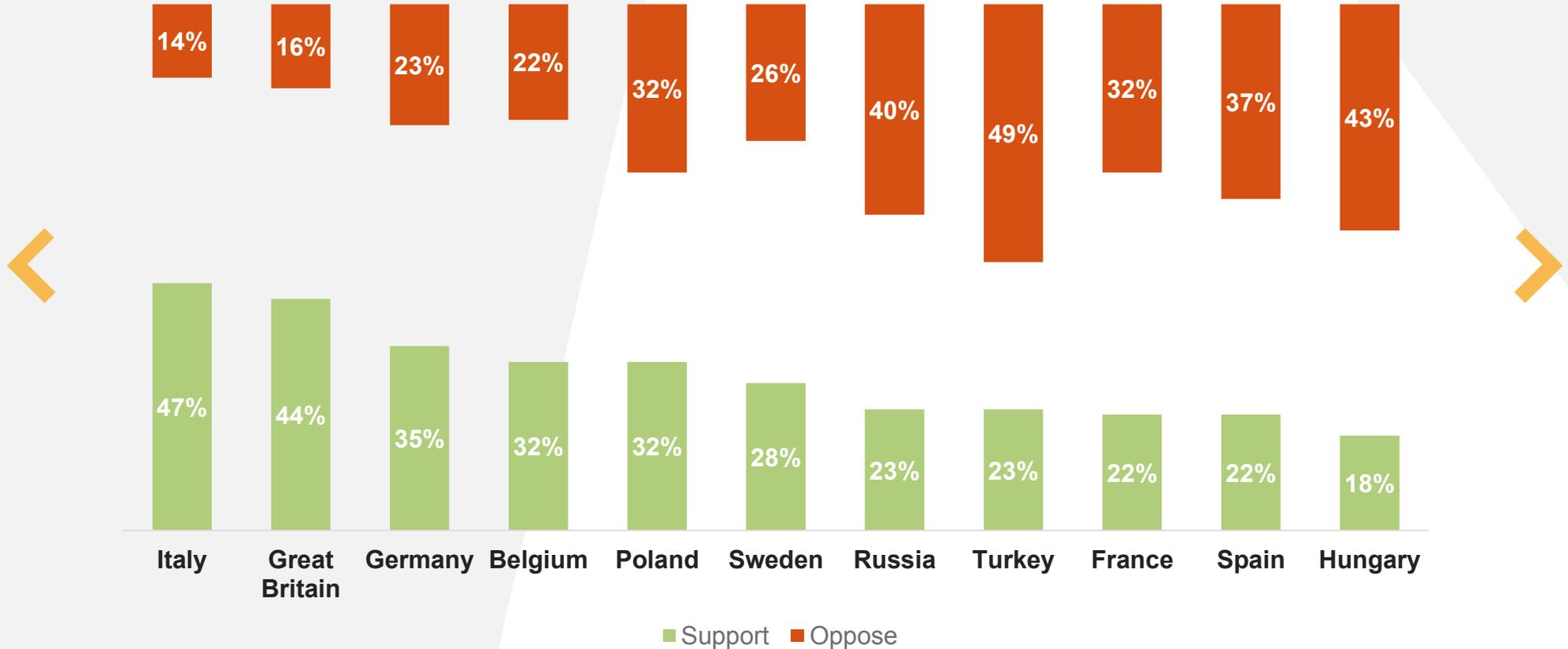
- Local roads
Belgium, Hungary, Russia
- Nuclear power
Poland
- New housing
Germany, Britain, Sweden
- Flood defences
France, Italy, Spain, Turkey





INFRASTRUCTURE #3: Public are split over borrowing to build infrastructure

To what extent do you support or oppose the national Government in [COUNTRY] borrowing money to fund the building of more/better infrastructure?





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