



December 2016

# EUROPE UPDATE

2016 in review

Ipsos Knowledge Centre

GAME CHANGERS





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# WELCOME

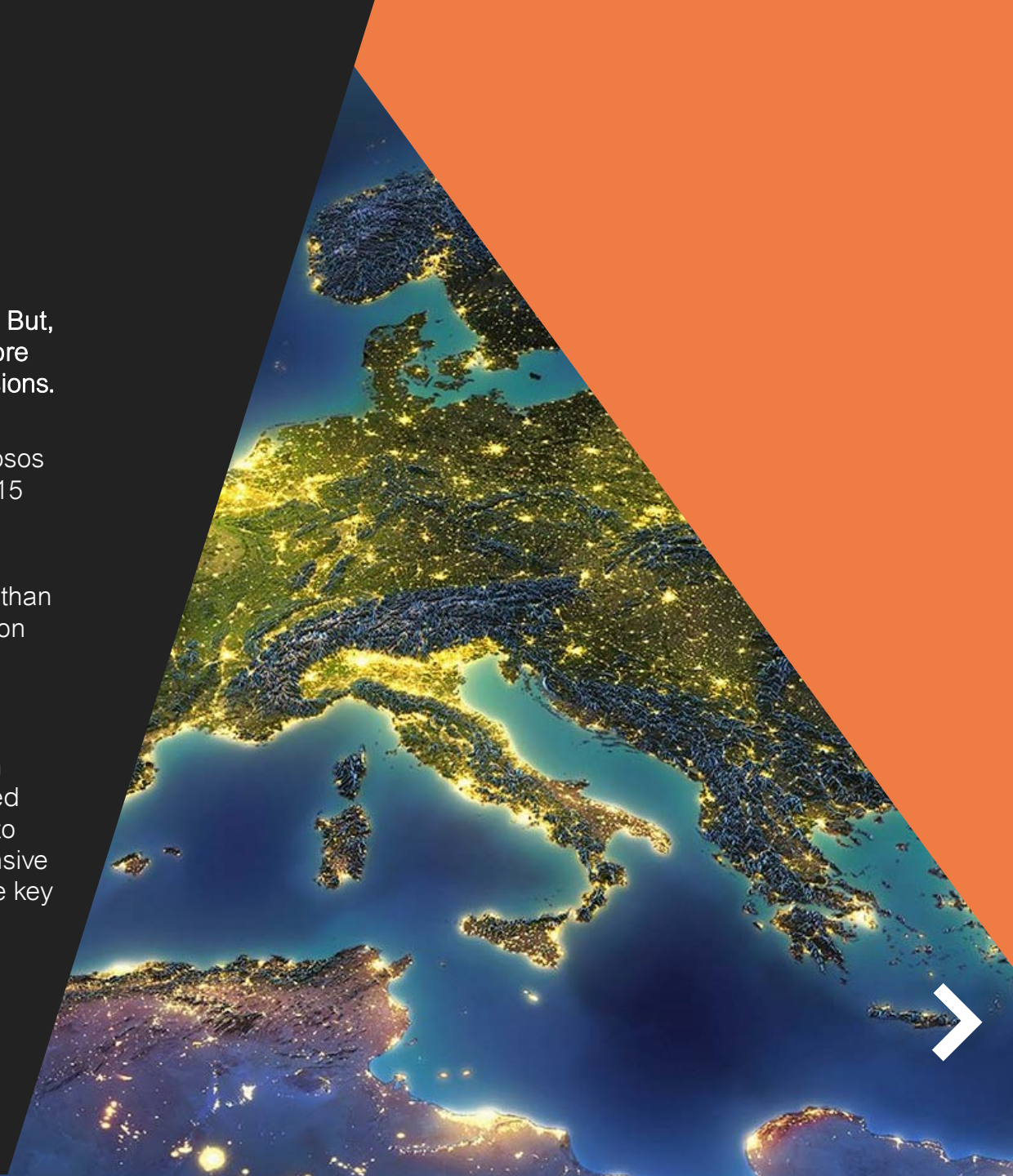
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Europe: the world's second smallest continent. But, with a population in excess of 750 million in more than 50 countries, it has many different dimensions.

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.



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## THE STATE WE'RE IN

### Gloom prevails

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

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## BREXIT:

### Predictions and reactions

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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

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## EDENRED WORKPLACE BAROMETER:

### Motivation at work

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

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## EUROPEAN AFFLUENT SURVEY

### The 2016 Report

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

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## WHAT WORRIES THE WORLD?

### Introducing the World Worries Index

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

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## EUROPEAN HOLIDAY BAROMETER:

### Off to the beach

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

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## MIGRATION:

### European views of the migration crisis

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

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## INFRASTRUCTURE:

### A European study of attitudes to infrastructure

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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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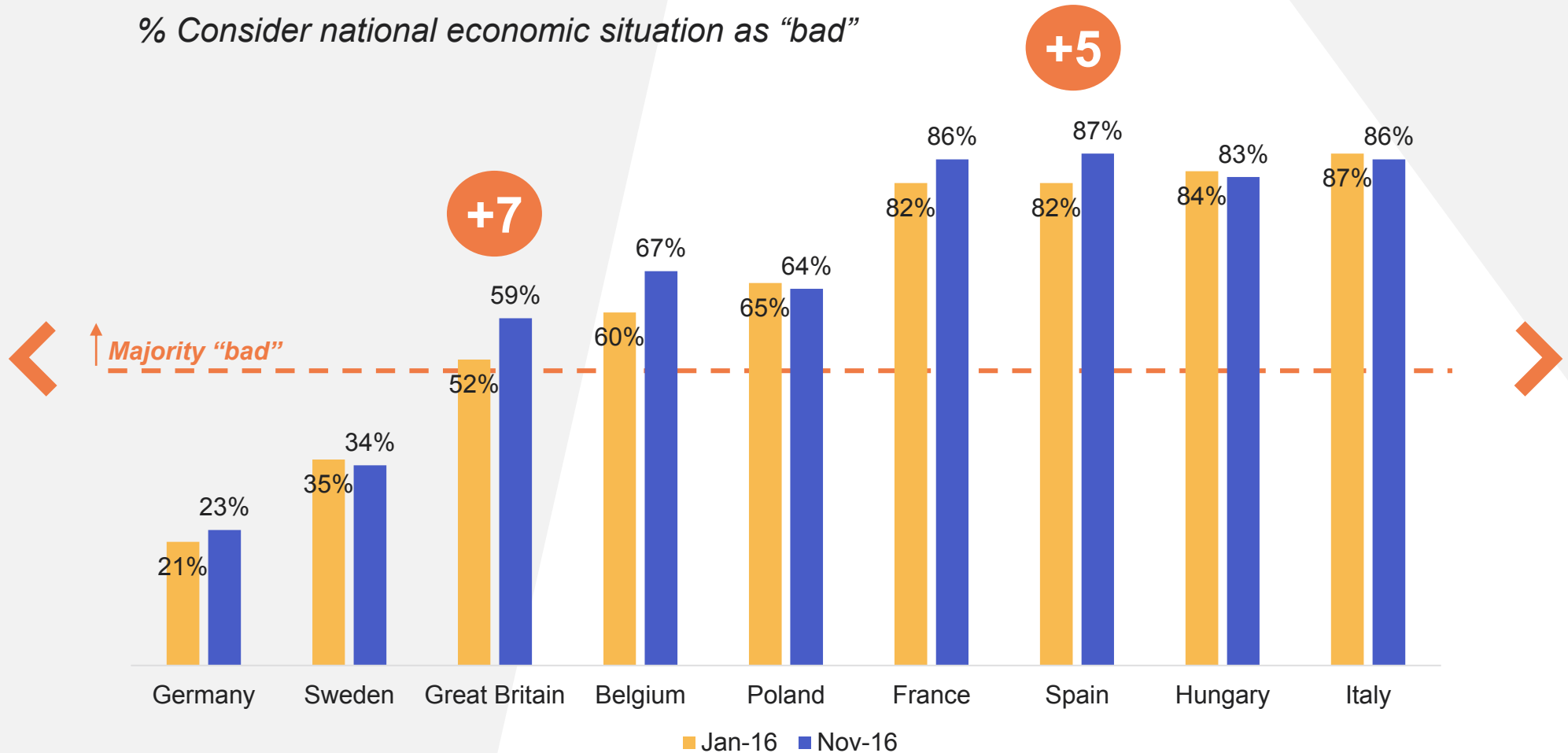
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# EUROPE #1: Economic negativity is “normal”

% Consider national economic situation as “bad”



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Source: Ipsos Global Advisor Economic Pulse Survey

Base: c 1,000 adults aged 16-64 each month per country (Belgium, Hungary, Poland, Sweden c. 500 per month)

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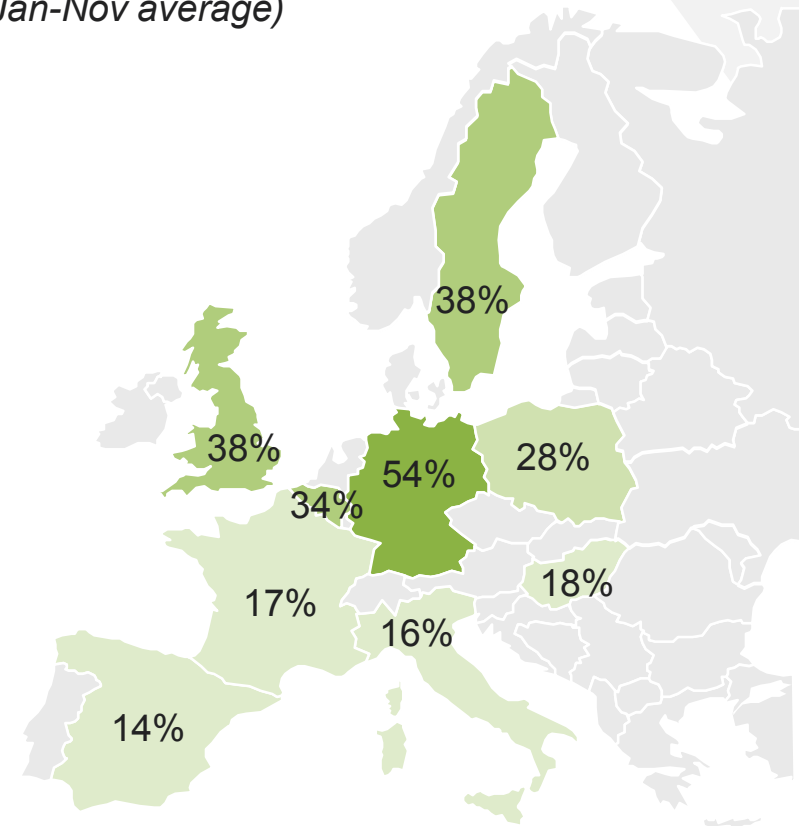
## EUROPE #2: Only the Germans are satisfied with the way things are going

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

*Significant differences highlighted*

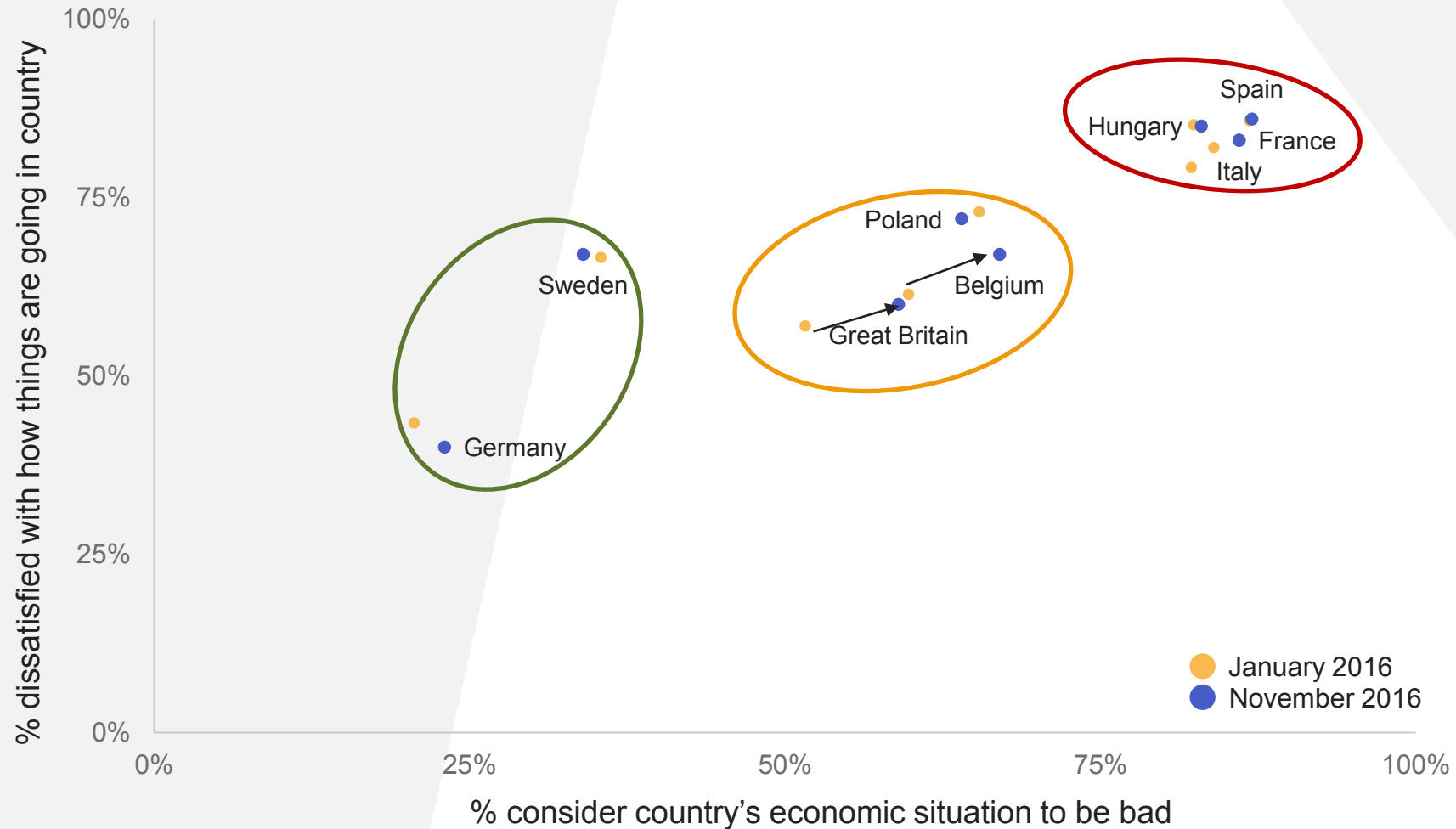
	Jan 2016	Nov 2016	Change
Germany	57%	60%	+3
Great Britain	43%	40%	-3
Belgium	39%	33%	-6
Sweden	33%	33%	0
Poland	27%	28%	+1
France	21%	17%	-4
Hungary	18%	15%	-3
Spain	15%	14%	-1

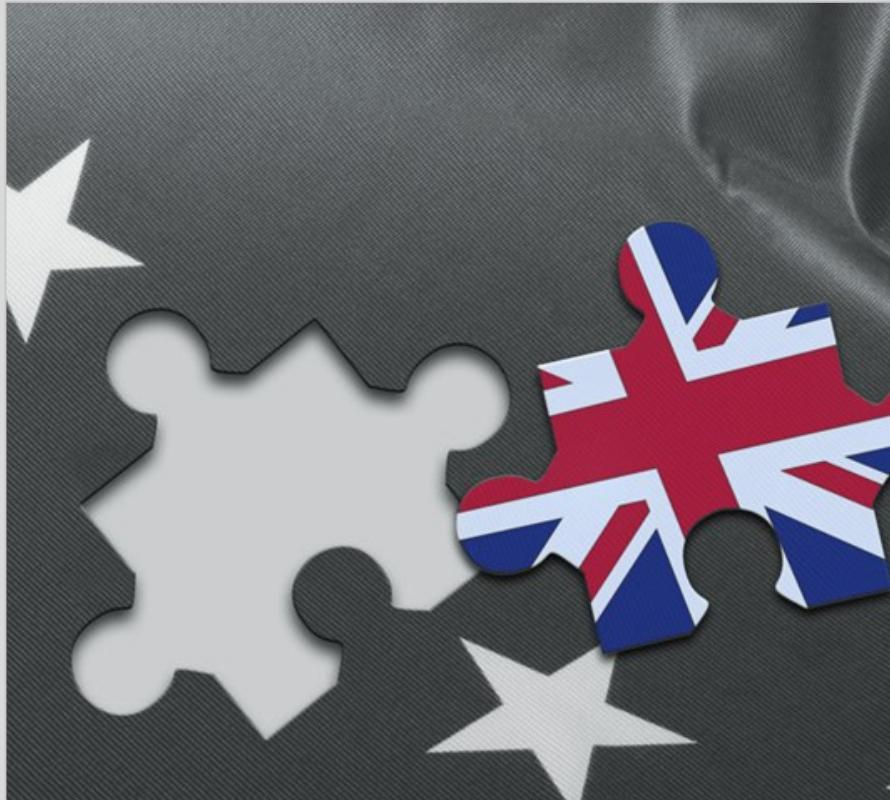
**Proportion who are satisfied with how things are going in their country**  
(Jan-Nov average)





## 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:

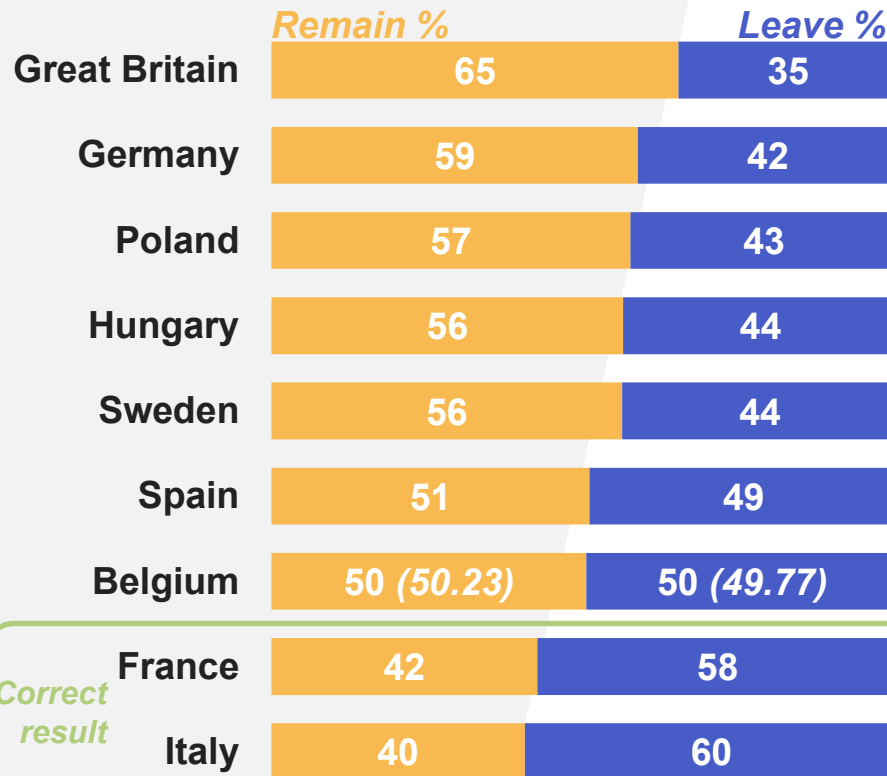
1. Only the French and Italians saw Brexit coming
2. Europeans see Brexit as a lose-lose proposition for both the UK and EU
3. The German public were particularly surprised by the vote to leave
4. European publics are split on whether to take a conciliatory or punitive approach to negotiations with Britain: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



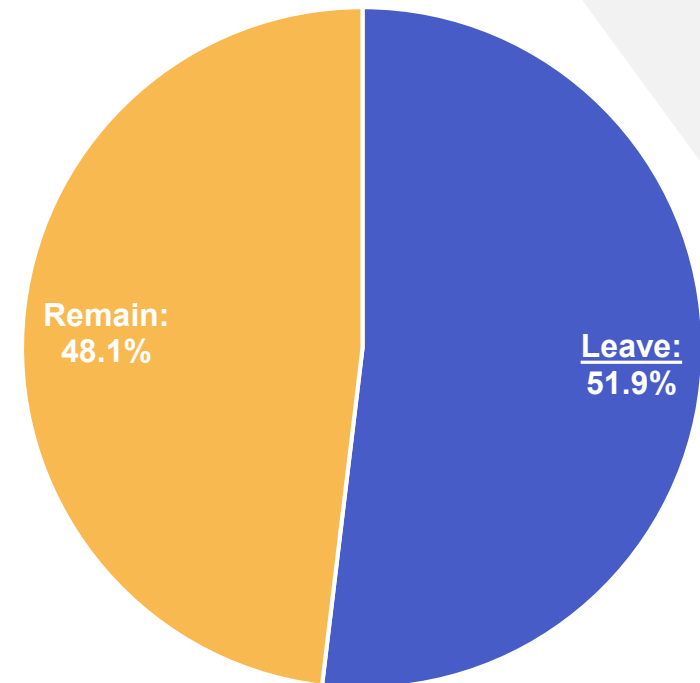


# BREXIT #1: Pre 23 June few expected Brexit – especially the British

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



Referendum result:

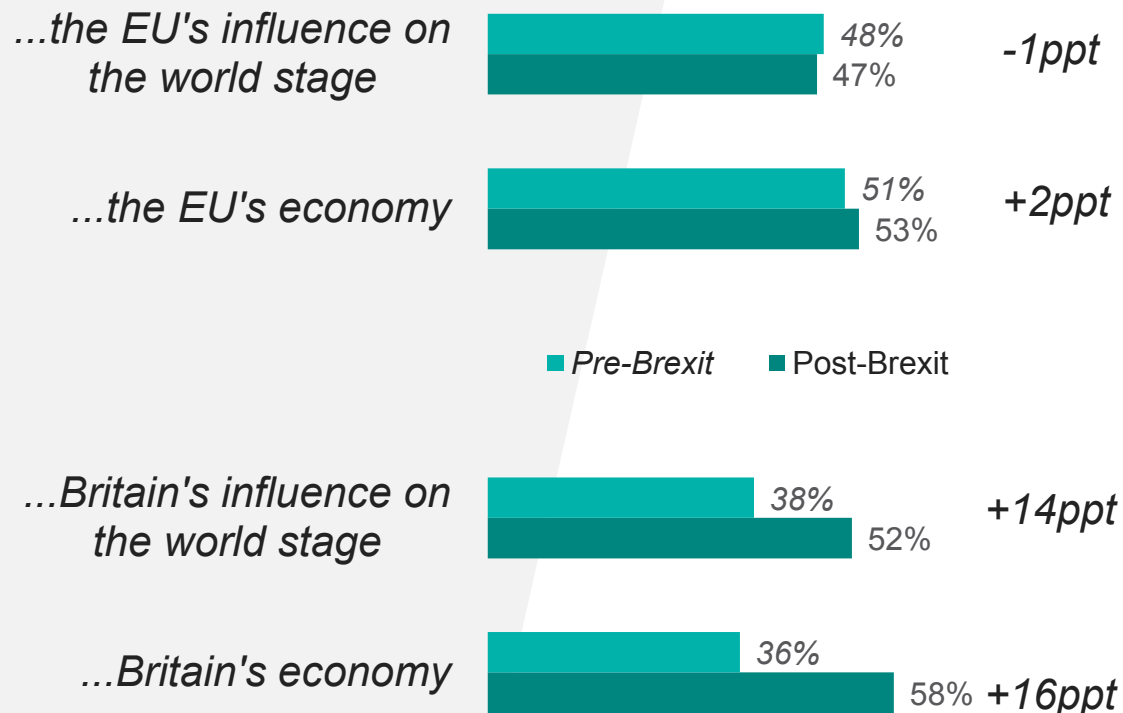




## BREXIT #2: Post 23 June, many re-evaluated how it would impact Britain

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

Change:



55%

Thought Brexit was the wrong decision for Britain

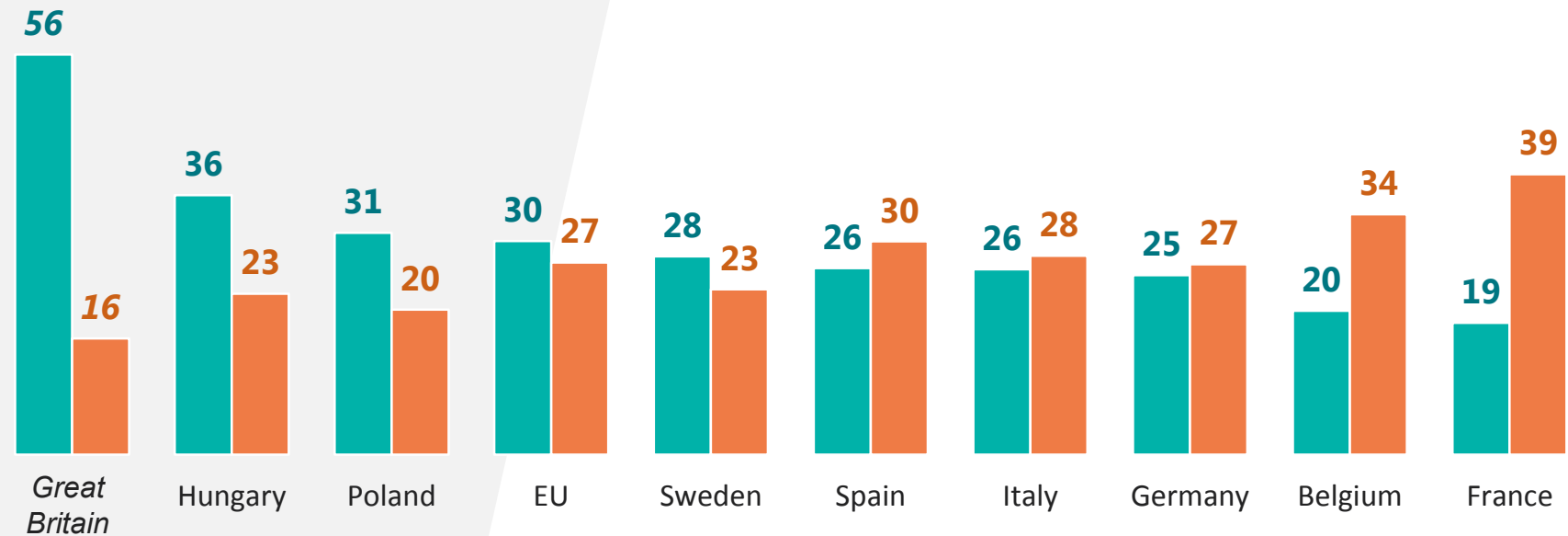


## BREXIT #3: EU countries divided on how to approach negotiations

### 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.

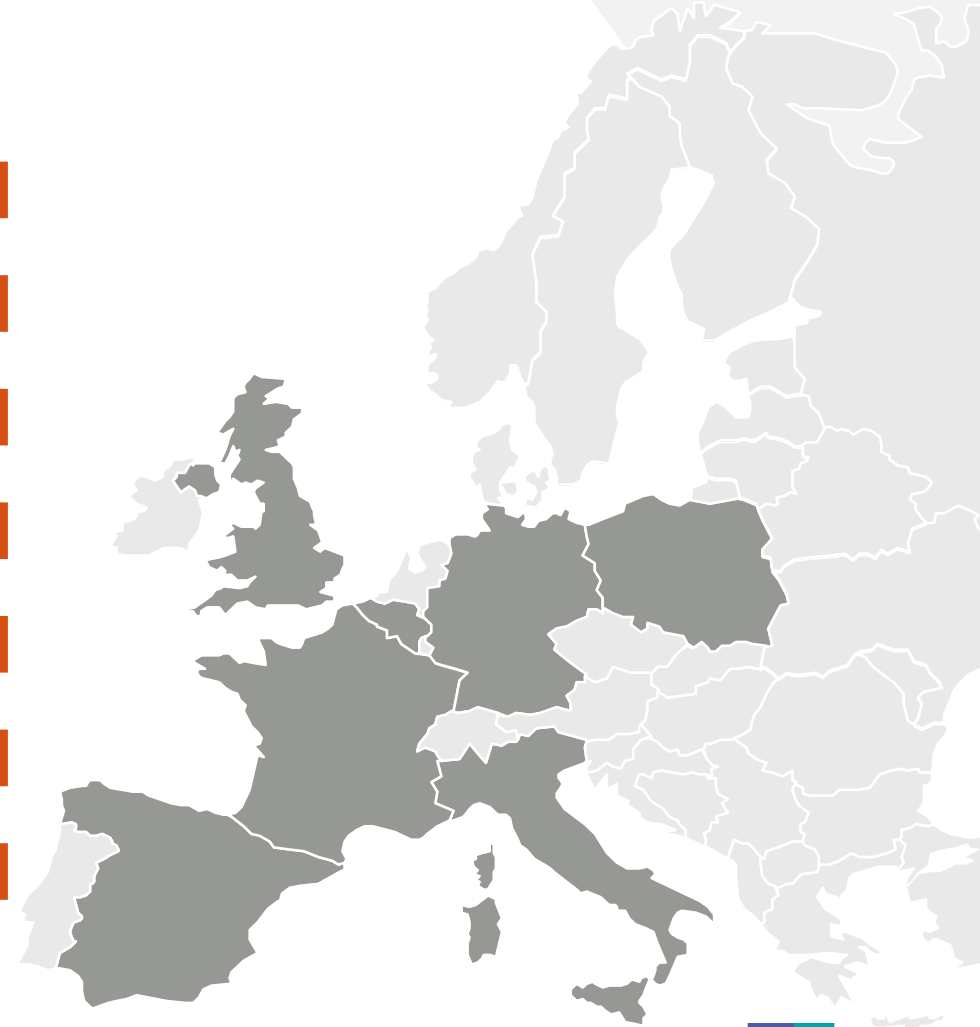
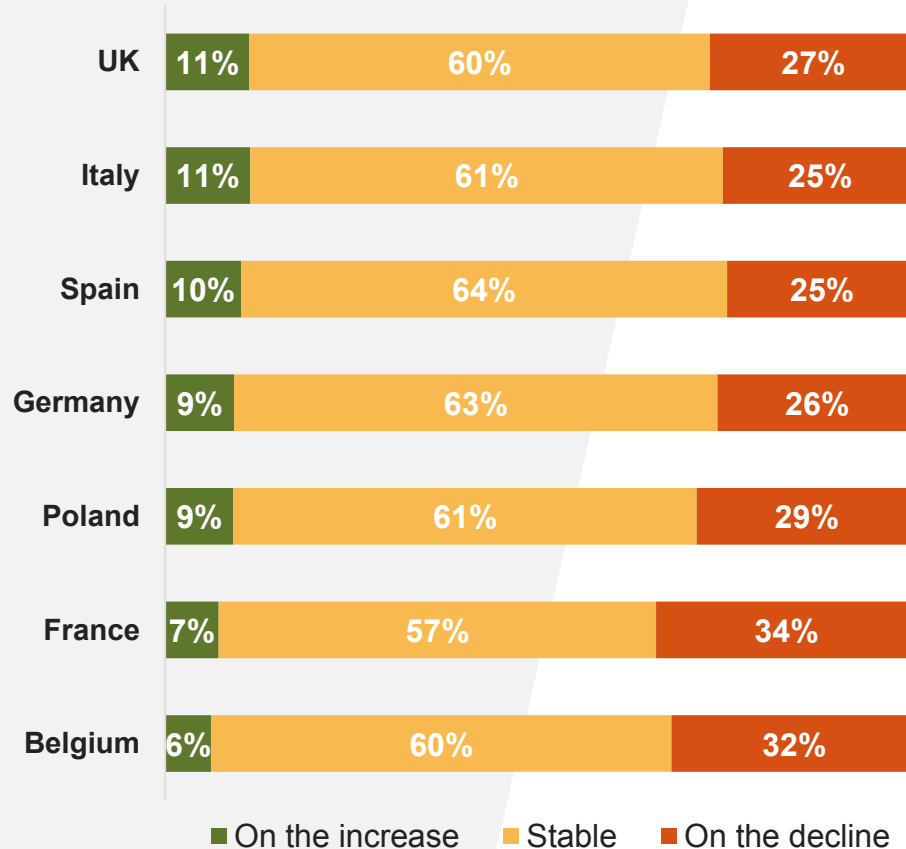
In the EU countries surveyed (Italy, Spain, Germany, France, the UK, Belgium and Poland) enthusiasm for work is rather less pronounced than in countries such as Turkey and Brazil. The norm for the European employees is to say their motivation is "staying about the same" or "on the decline".

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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Source: Edenred-Ipsos Barometer 2016.

Base: c.800 interviews per country

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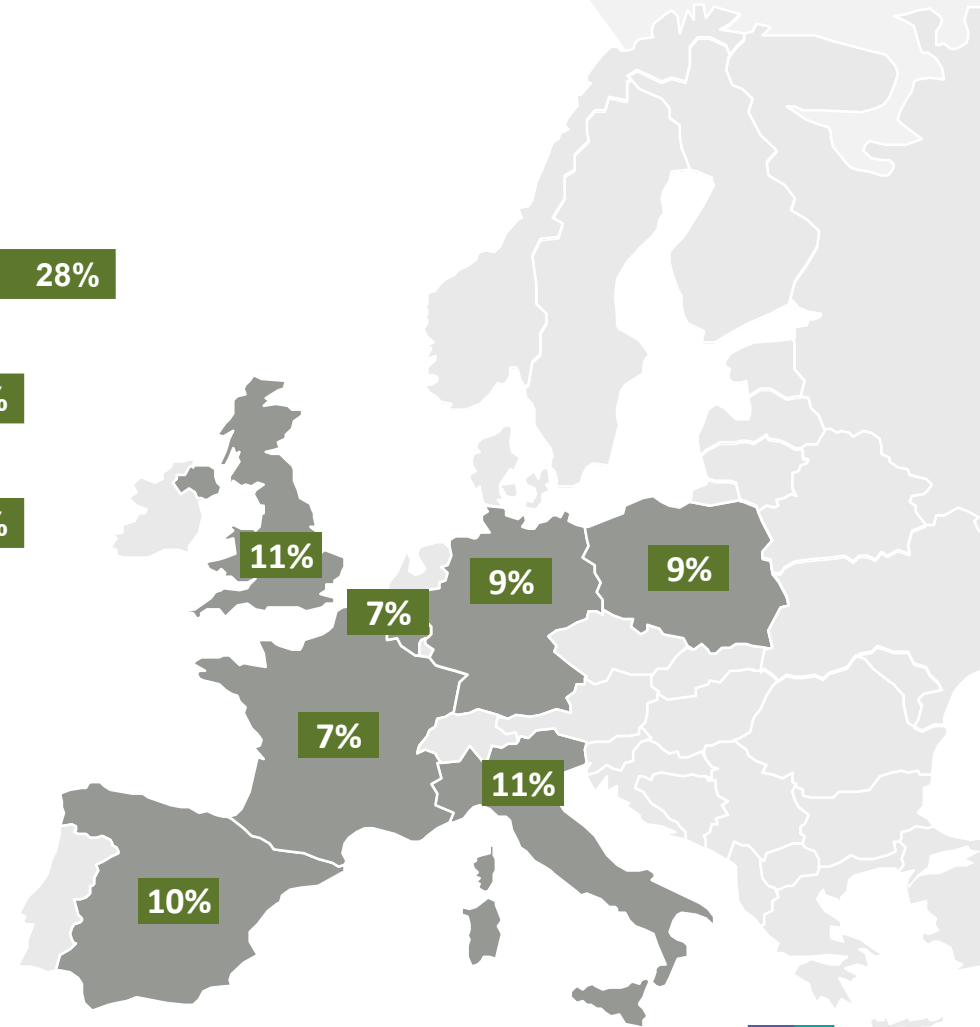
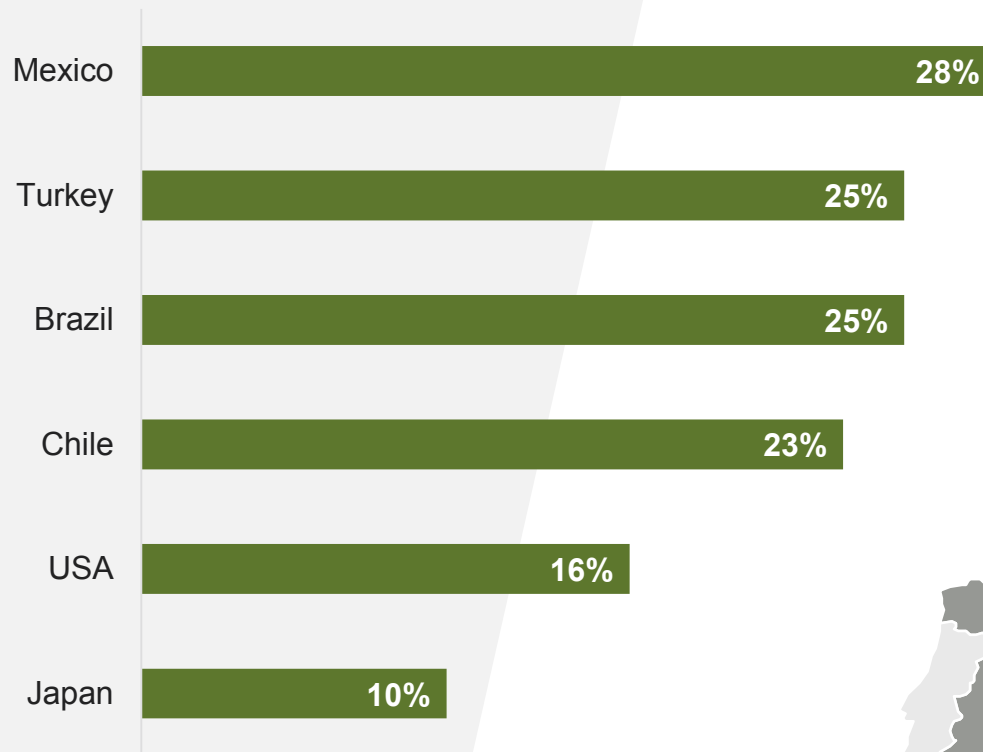




## WORKPLACE #2: EU workers are less enthusiastic than others

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

% “on the increase”



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Source: Edenred-Ipsos Barometer 2016.

Base: c.800 interviews per country

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## 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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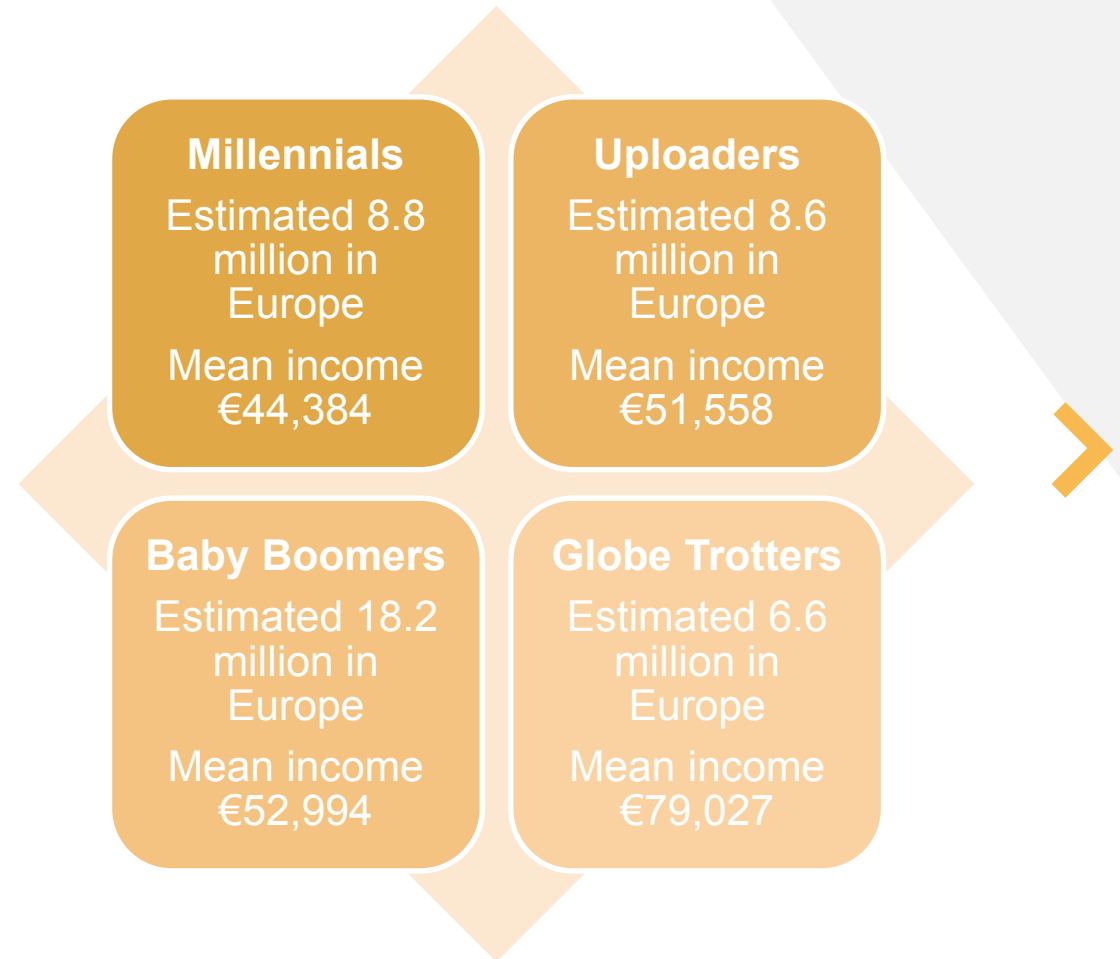
# AFFLUENCE #1: Key segments in the European affluent universe

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)



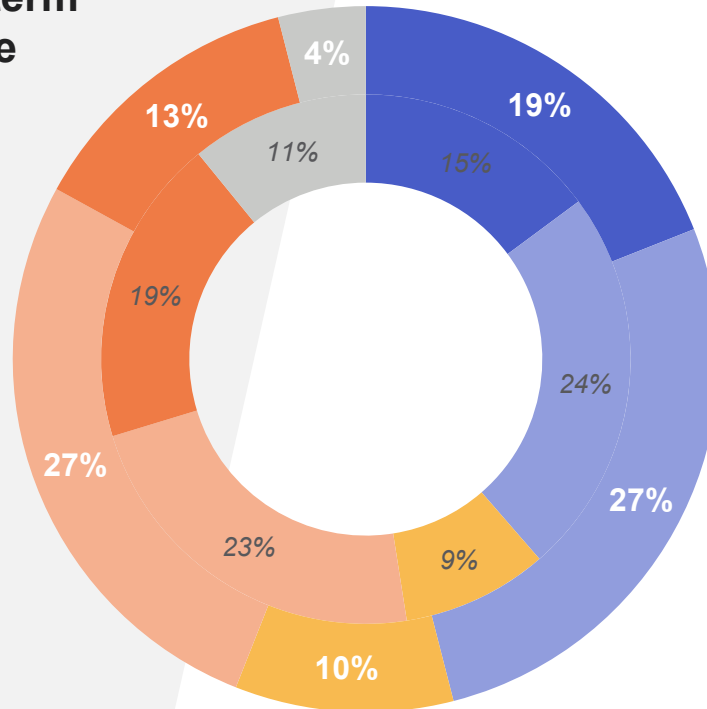




## AFFLUENCE #2: Better-off Europeans more internationalist and pro-EU

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

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## WORLD WORRIES INDEX

### What worries the world?

**2016 saw the launch of this new survey comparing the major concerns for citizens in 25 nations worldwide**

Unemployment, terrorism, corruption: a new Ipsos poll investigates the wide range of concerns pressing on global citizens.

Conducted monthly with an online sample of citizens in 25 countries, the Ipsos “What Worries the World” survey asks which (from a list of topic areas) are the issues people find most concerning.

When we focus on EU countries, the chief concern is unemployment (38%), followed closely by poverty and social inequality (36%). However, views within these countries differ sharply; Britons’ chief concern is immigration, in France and Belgium it is terrorism, whilst in Hungary and Poland it is healthcare.

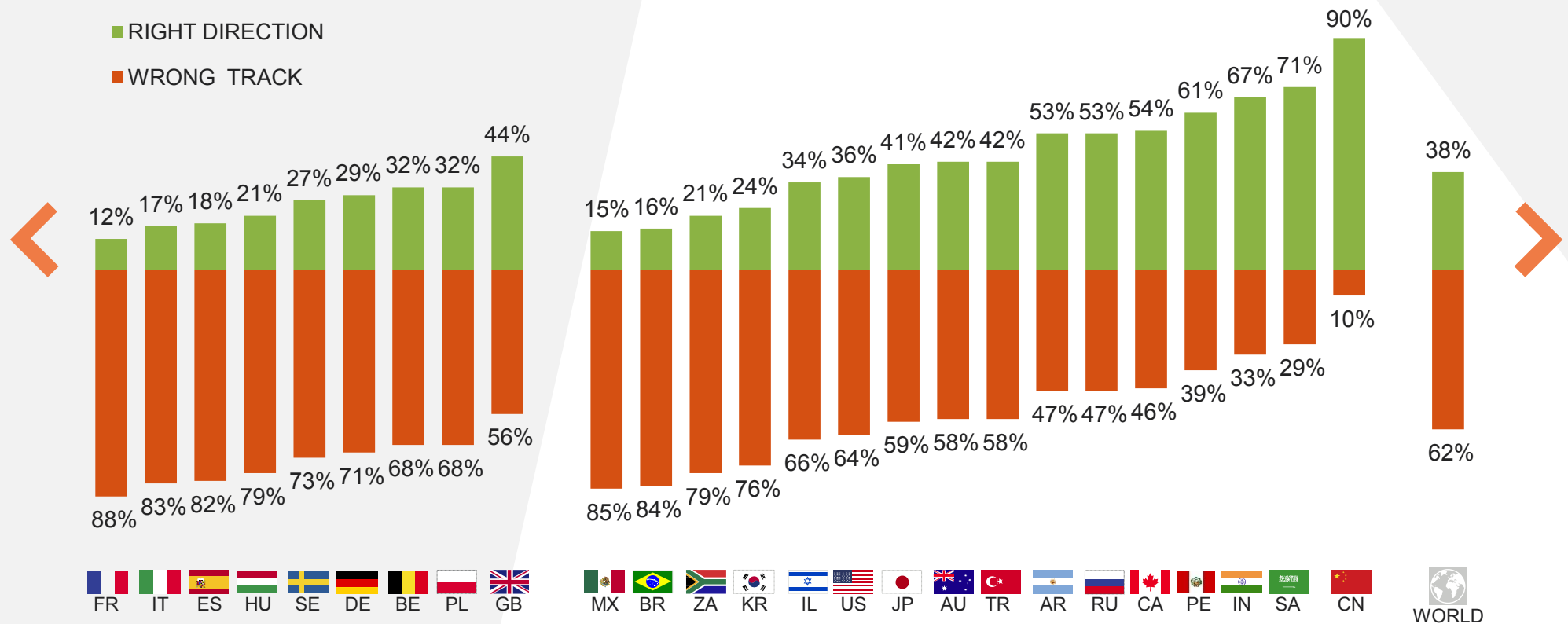


# WORRIES #1: EU countries among most pessimistic on way things are going

*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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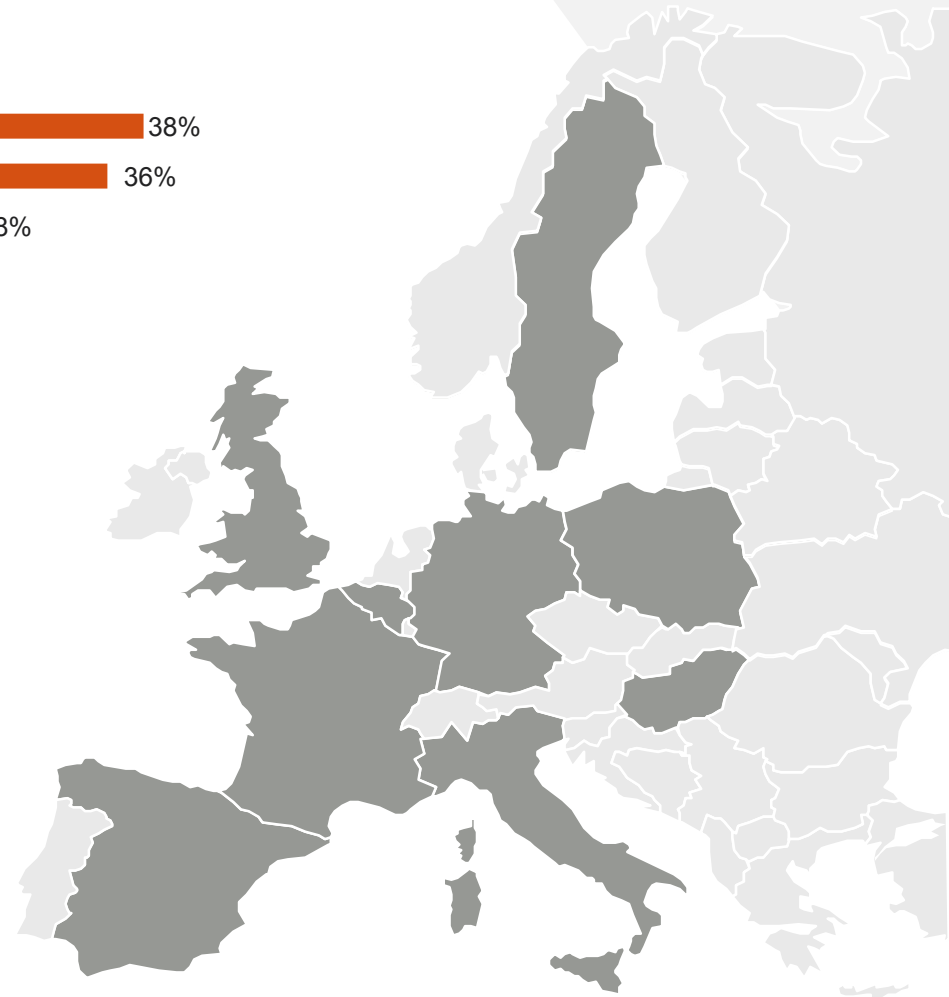
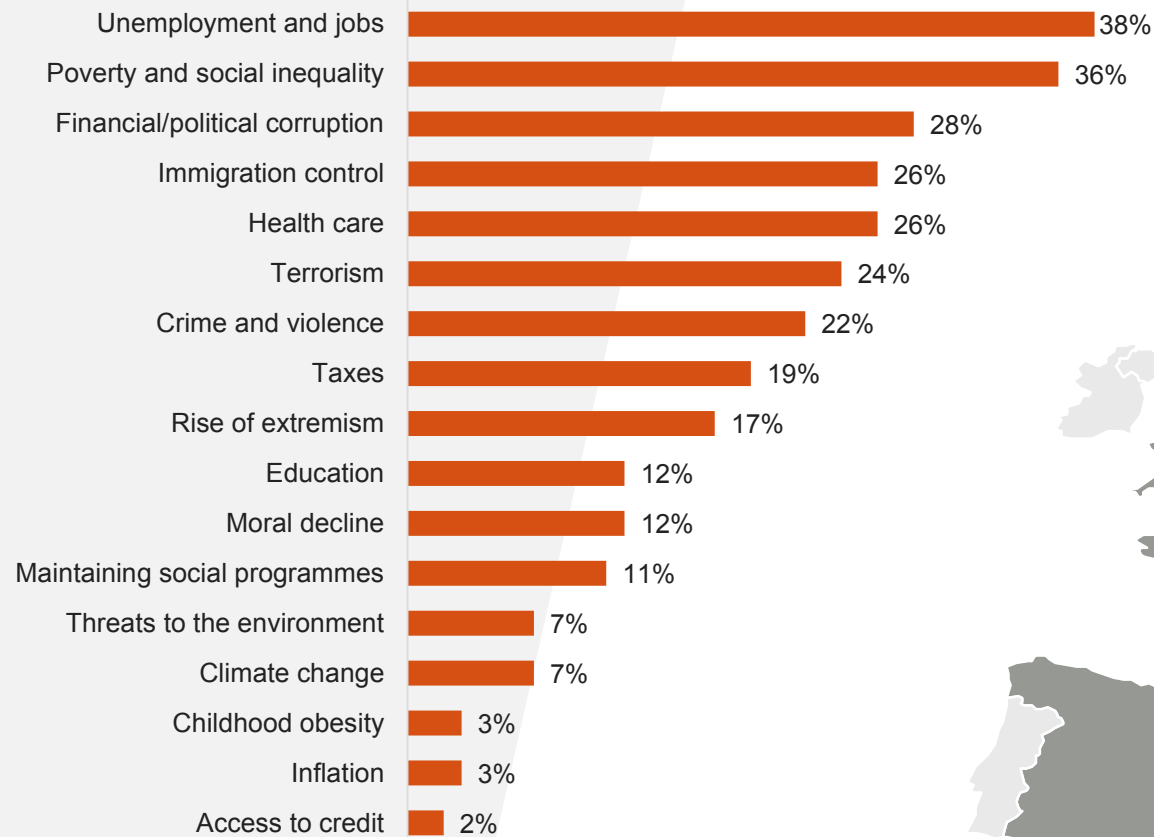






# WORRIES #2: Unemployment is the biggest EU issue overall

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



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Source: Ipsos World Worries Index

Base: Sample of 7,003 adults aged 16-64 in 9 participating countries, 26th August – 9th September

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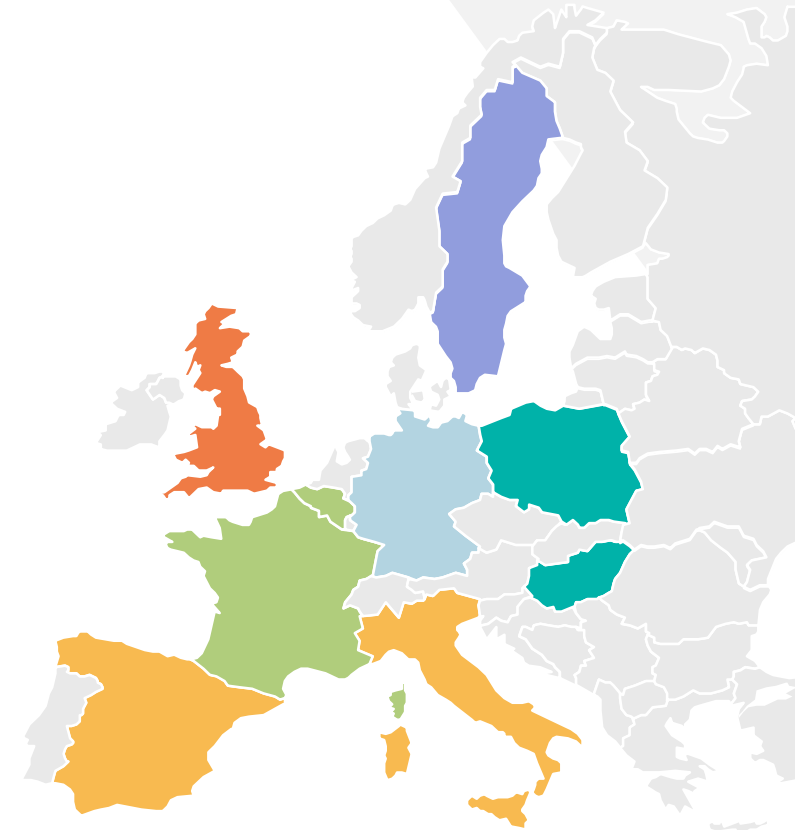




## WORRIES #3: But priorities differ A LOT by country

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

	First	Second	Third
<b>Great Britain</b>	Immigration – 42%	Healthcare – 34%	Terrorism – 31%
<b>France</b>	Terrorism – 55%	Unemployment – 48%	Taxes – 28%
<b>Spain</b>	Unemployment – 70%	Corruption – 53%	Inequality – 33%
<b>Belgium</b>	Terrorism – 38%	Inequality – 35%	Unemployment – 34%
<b>Italy</b>	Unemployment – 66%	Taxes – 40%	Corruption – 34%
<b>Sweden</b>	Crime and violence – 42%	Immigration – 33%	Unemployment – 28%
<b>Germany</b>	Inequality – 45%	Immigration – 41%	Terrorism – 31%
<b>Hungary</b>	Healthcare – 59%	Corruption – 58%	Inequality – 56%
<b>Poland</b>	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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# HOLIDAYS #1: The average European summer holiday was 2 weeks

## Summer holiday duration:

Less than a week 9%

One week 28%

Two weeks 40%

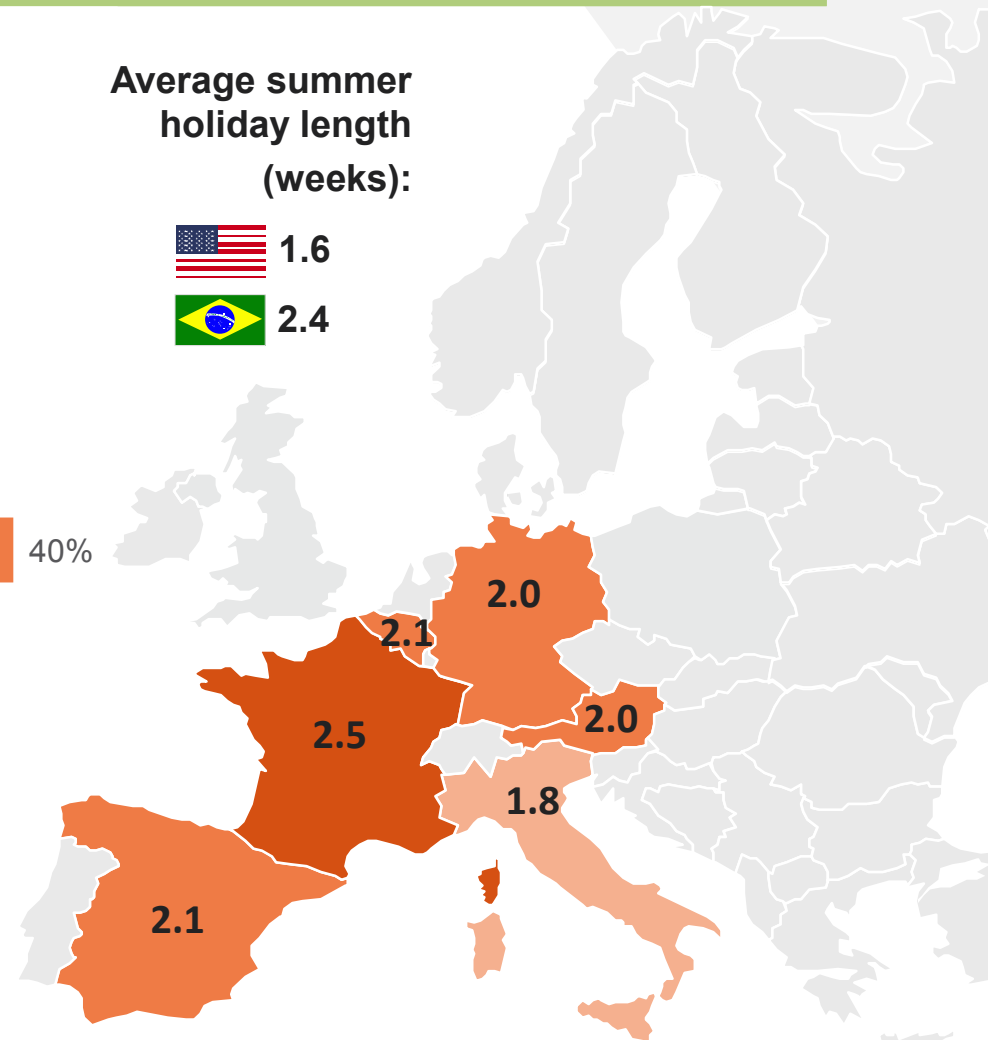
Three weeks 13%

Four weeks or more 12%

## Average summer holiday length (weeks):

 1.6

 2.4



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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

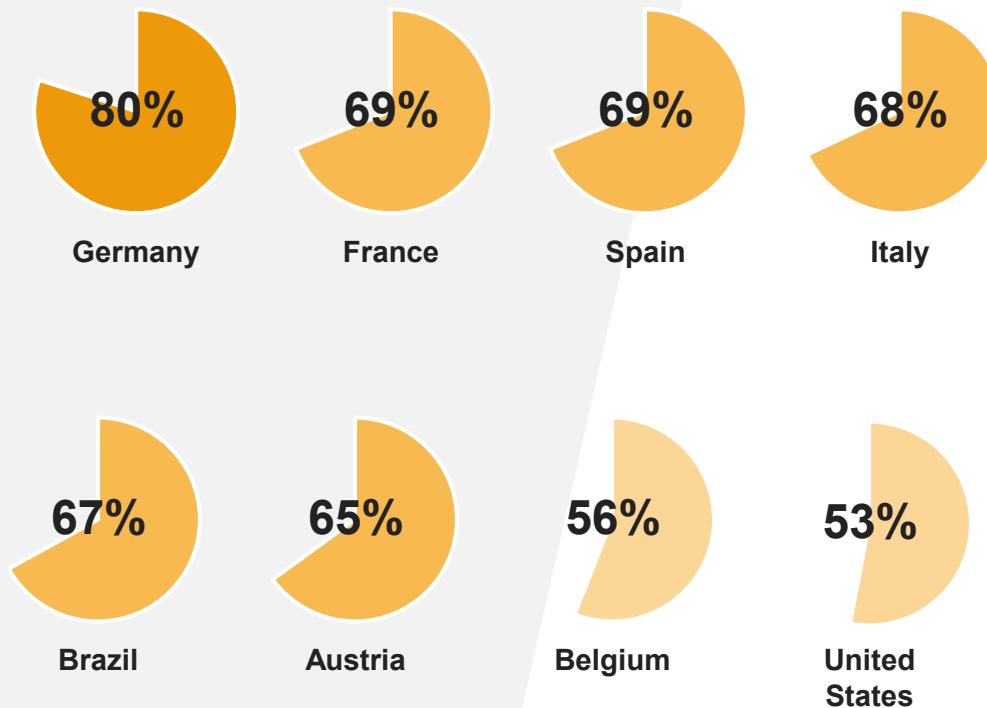
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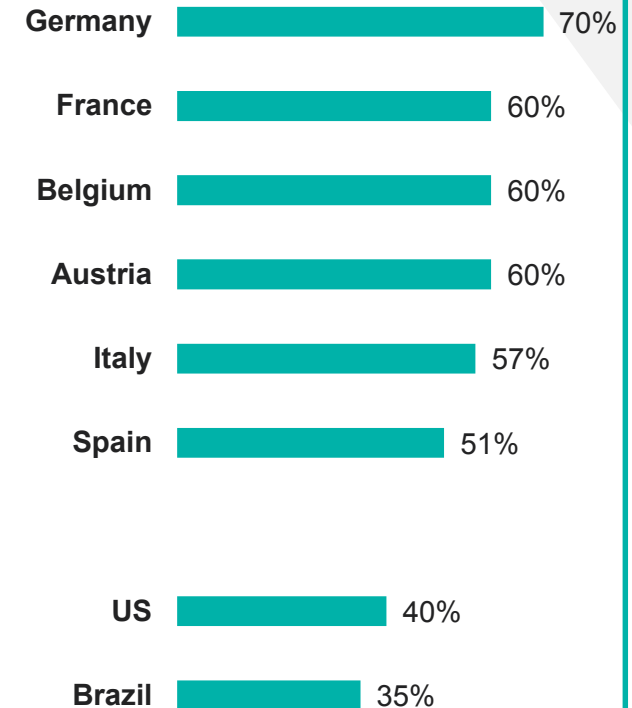


## HOLIDAYS #2: Europeans more likely to switch off on holiday than Americans

% 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 @dvisor 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

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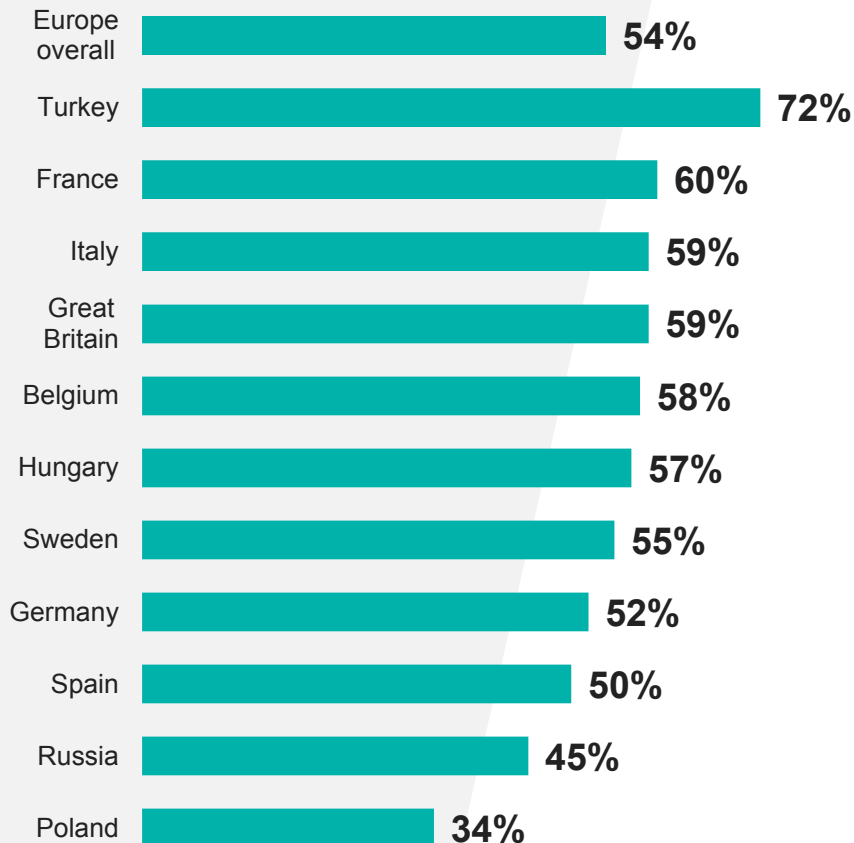




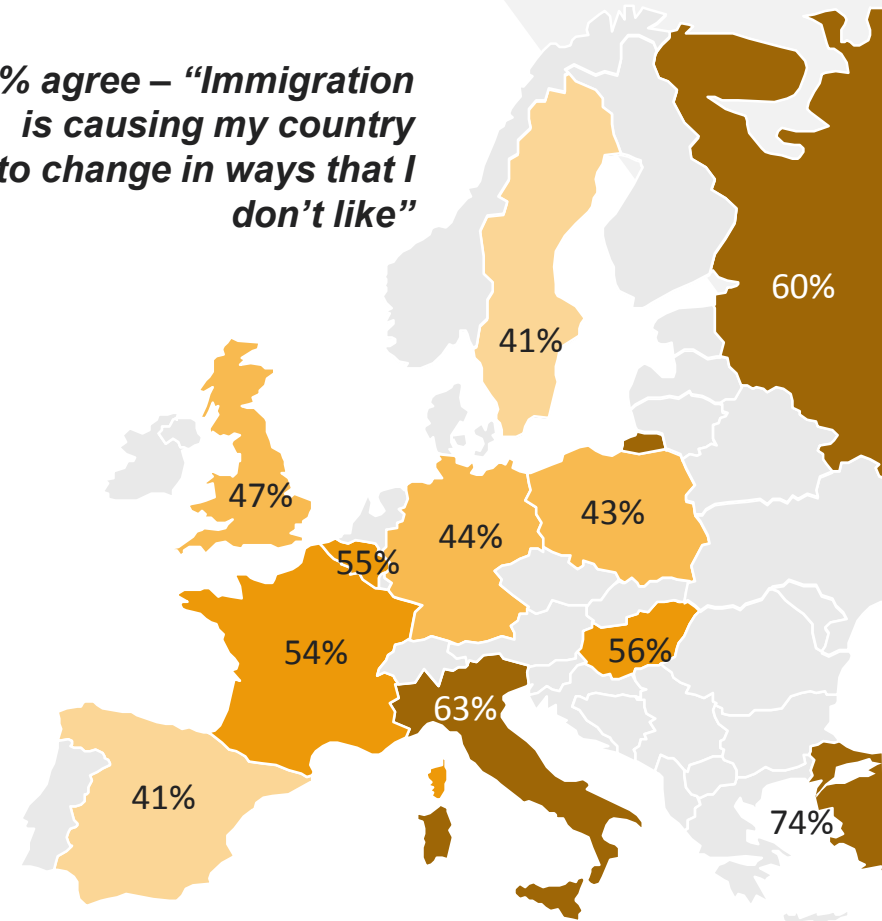
## MIGRATION #2: Wide concern about immigration pressuring public services

**“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

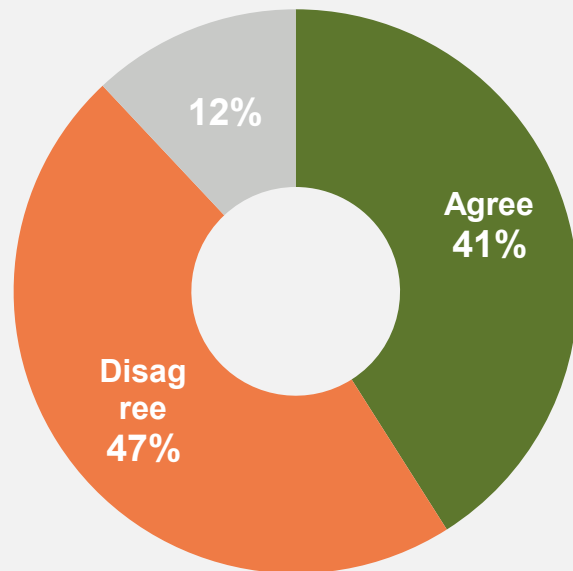
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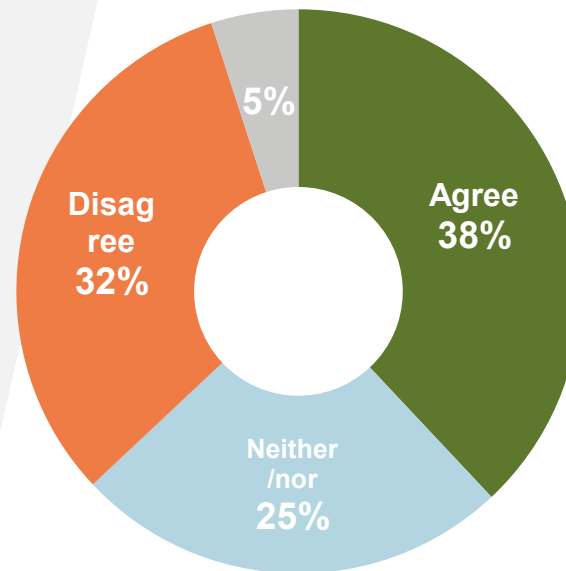
## MIGRATION #3: Europe-wide views on migration are split

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



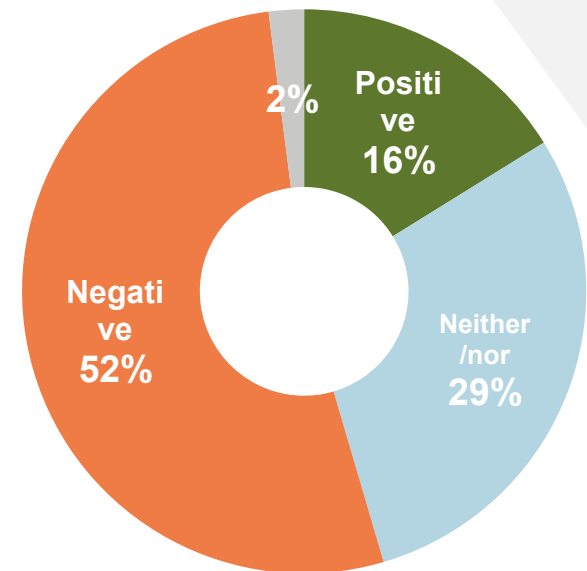
High – Turkey (64%)  
Low – Spain (24%)

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



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

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



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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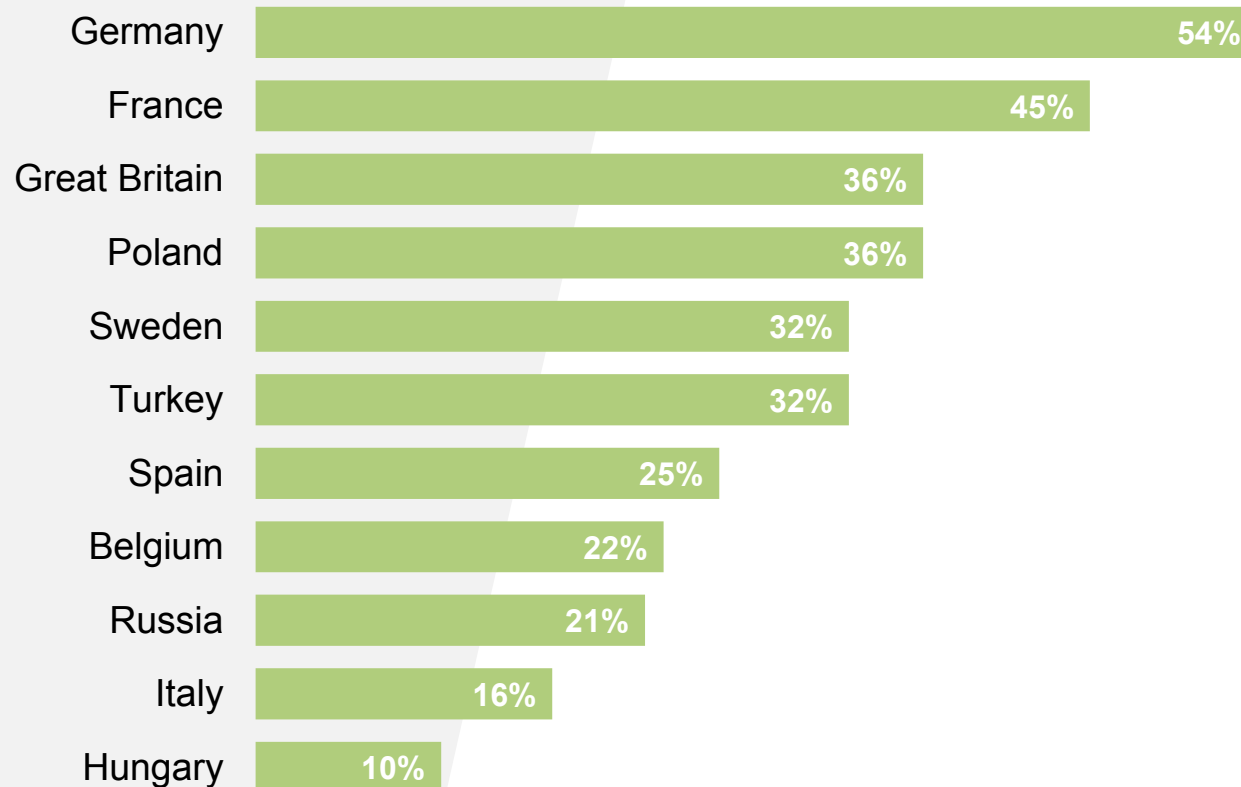






# INFRASTRUCTURE #1: Satisfaction varies widely across Europe

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





## INFRASTRUCTURE #2: Greatest pride in infrastructure differs across Europe

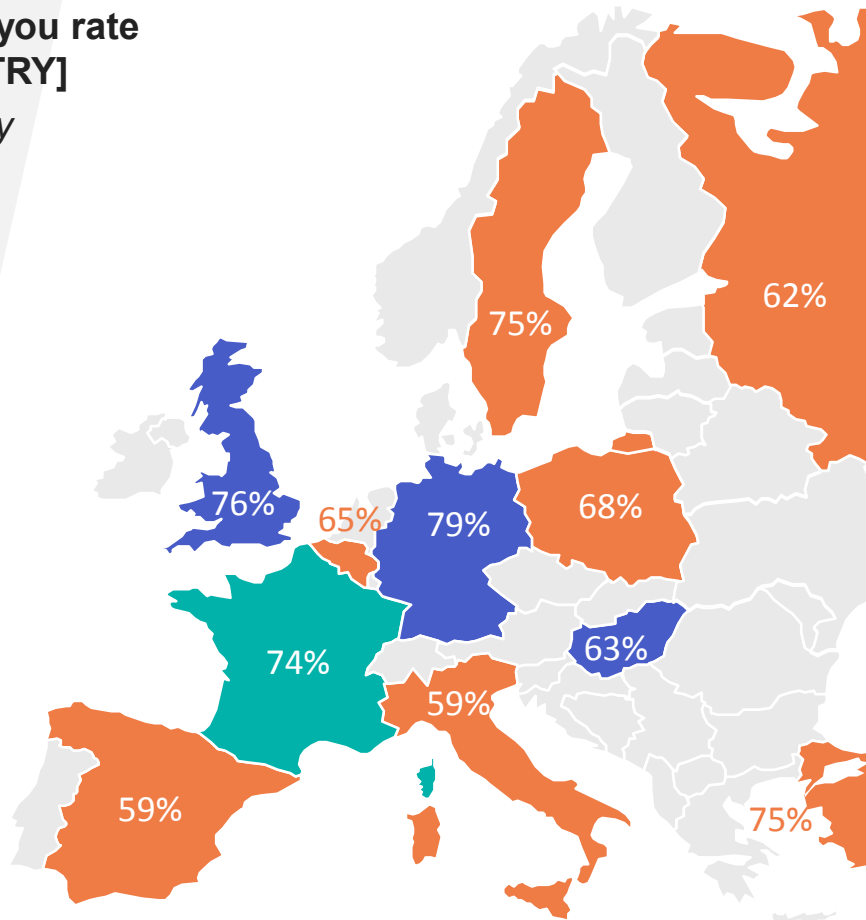
Please indicate how good or poor you rate the current quality of ... in [COUNTRY]

*Top infrastructure category by country*

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

### Lowest rated infrastructure:

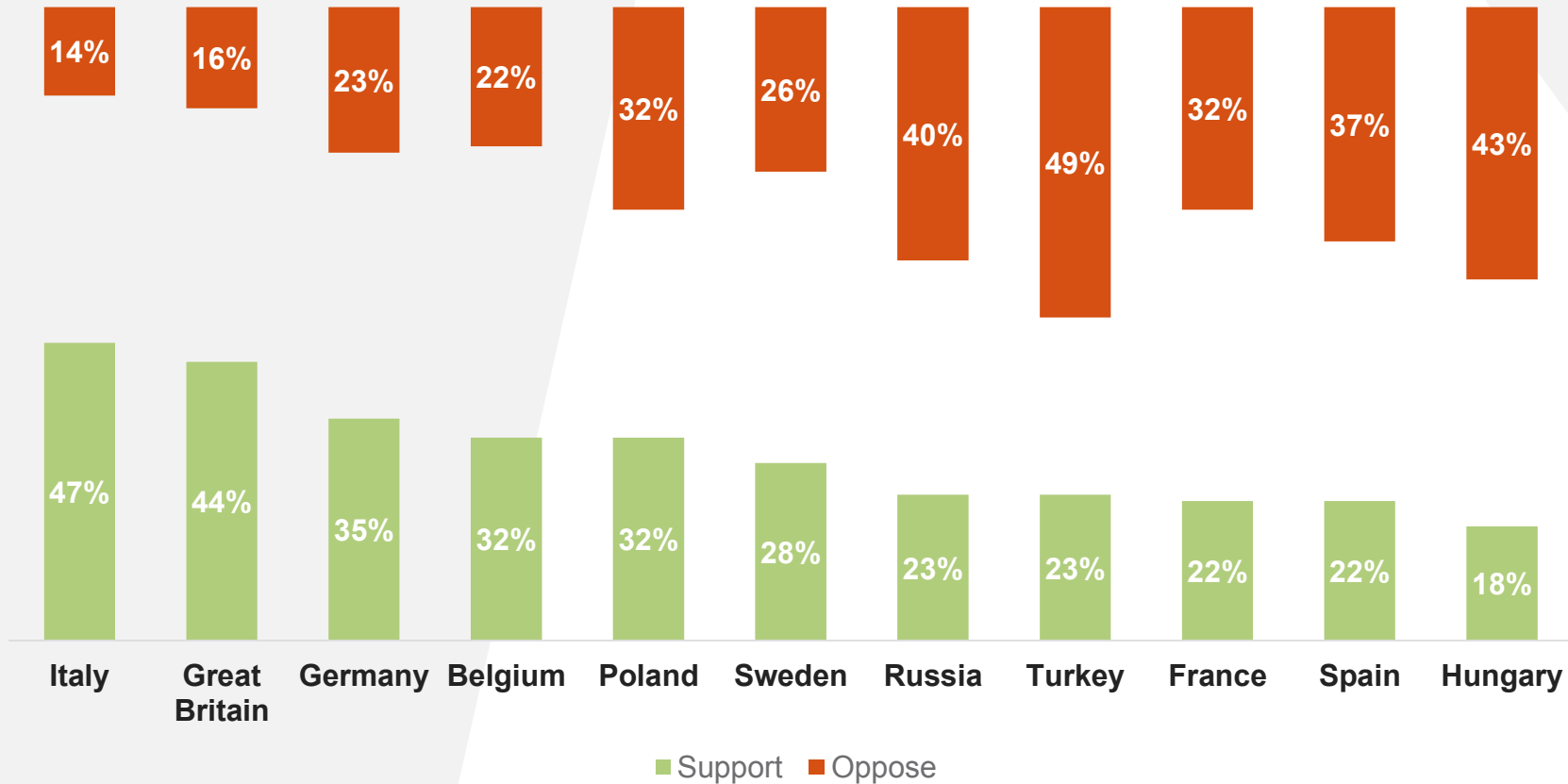
- Local roads  
*Belgium, Hungary, Russia*
- Nuclear power  
*Poland*
- New housing  
*Germany, Britain, Sweden*
- Flood defences  
*France, Italy, Spain, Turkey*





## 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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