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WISSEN WAS BEWEGT



Eyes on Europe Q4|2012

Wiener Neudorf, im
Jänner 2013

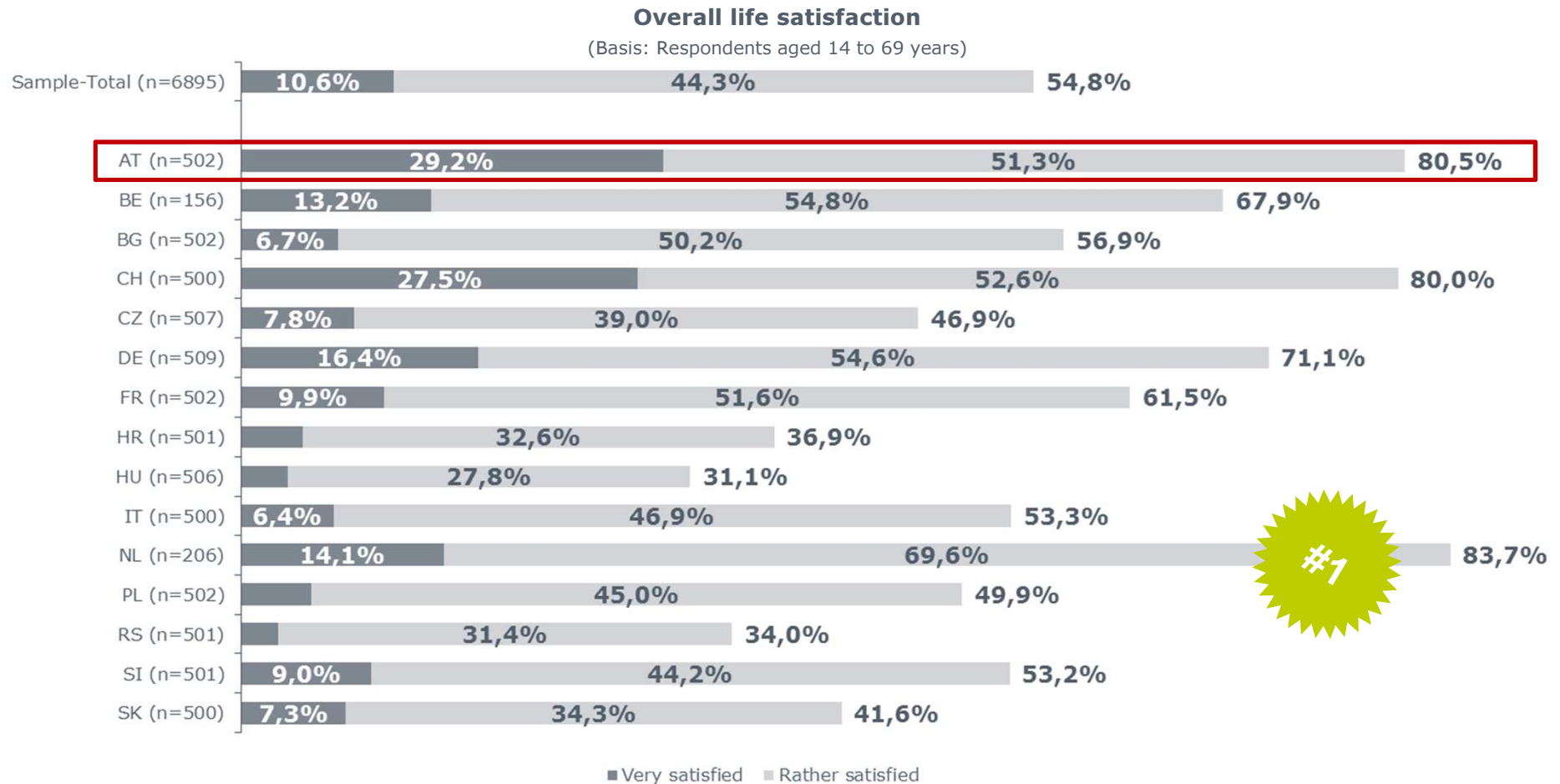


Studiensteckbrief | Erhebungsmethode:

- **Methode:** Computer Assisted Web Interviews (CAWI)
- **Erhebungsinstrument:** Online Interviews über die Marketagent.com Research-Plattform
- **Sample:** web-aktive Internet-Nutzer zwischen 14 und 69 Jahren in 15 Ländern
- **Länder:** AT, DE, CH, IT, FR, CZ, HU, HR, RS, SI, SK, BG, PL, BE, NL
- **Panel-Größe:** > 415.000 Panelisten (Stand: 01|2013)
- **Stichprobengröße:** n = 6.895 Netto-Interviews, Random Selection nach Quoten
- **Feldzeit:** 14.12.2012 – 25.12.2012
- **Screening:** Alter und Land
- **Incentives:** geldwerte Bonuspunkte
- **Fragebogenlänge (LOI):** 32 geschlossene Fragen
- **Studienleiter:** Marketagent.com, Primož Logar
- **Kontakt:** p.logar@marketagent.com



Overall life satisfaction: Österreich ist Vize-Europameister punkto Zufriedenheit.



Overall life satisfaction II:

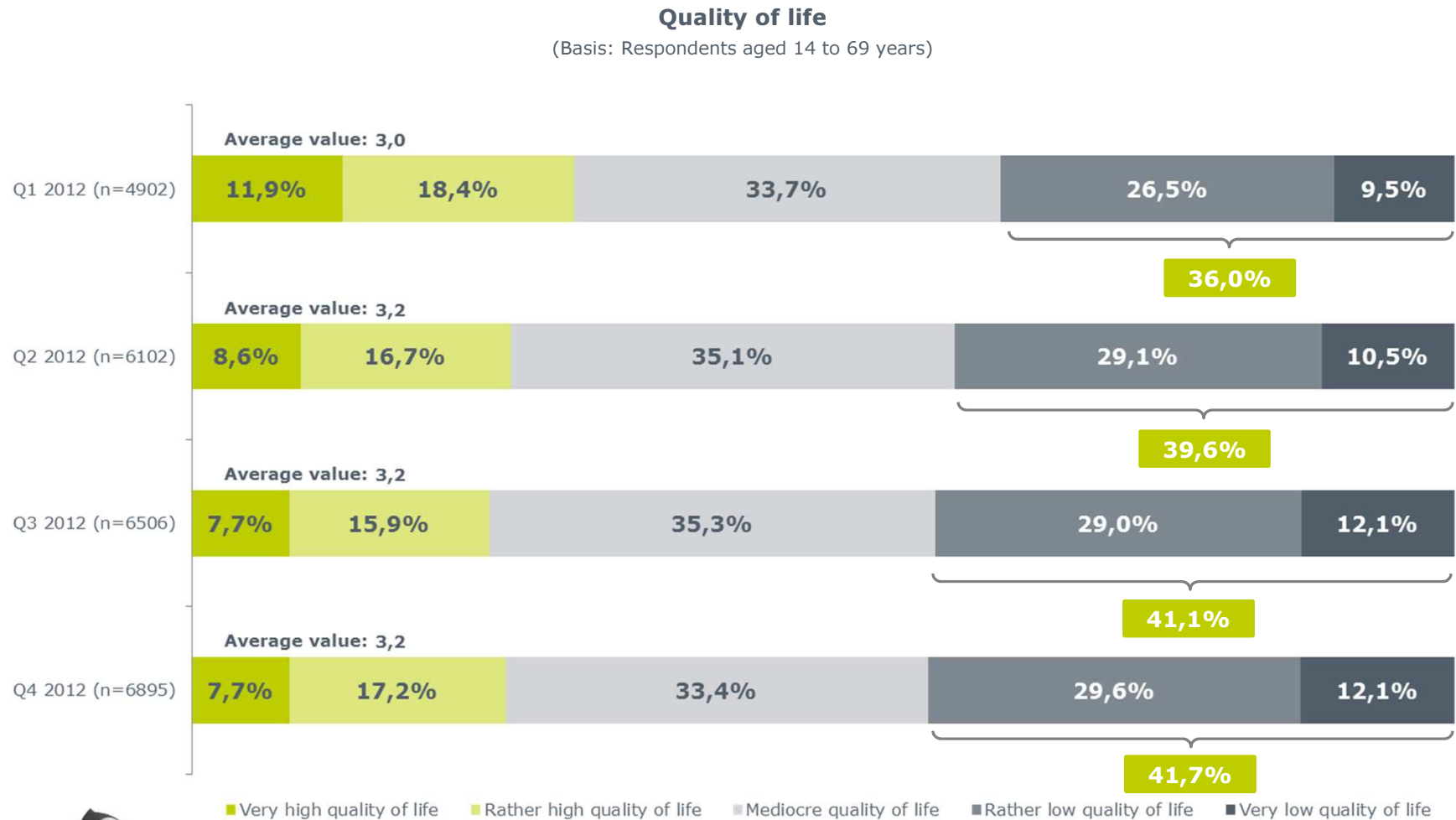
Rückgang auf hohem Niveau: Allgemeine Zufriedenheit zeigt Tiefstwert.

Top 2 Box: rated with "very satisfied" and "rather satisfied"	Q1 2012	Q2 2012	Q3 2012	Q4 2012
Sample-Total	57,2%	54,8%	55,0%	54,8%
AT	84,4%	82,8%	84,9%	80,5%
BE	-	-	-	67,9%
BG	-	61,8%	56,8%	56,9%
CH	83,1%	81,3%	80,6%	80,0%
CZ	50,1%	49,4%	46,7%	46,9%
DE	79,7%	77,4%	72,6%	71,1%
FR	63,6%	66,4%	70,2%	61,5%
HR	36,8%	34,6%	35,1%	36,9%
HU	32,1%	31,5%	33,7%	31,1%
IT	64,9%	54,3%	58,2%	53,3%
NL	-	-	-	83,7%
PL	-	49,4%	48,9%	49,9%
RS	32,9%	28,2%	32,2%	34,0%
SI	55,4%	52,1%	53,2%	53,2%
SK	41,9%	43,2%	41,9%	41,6%

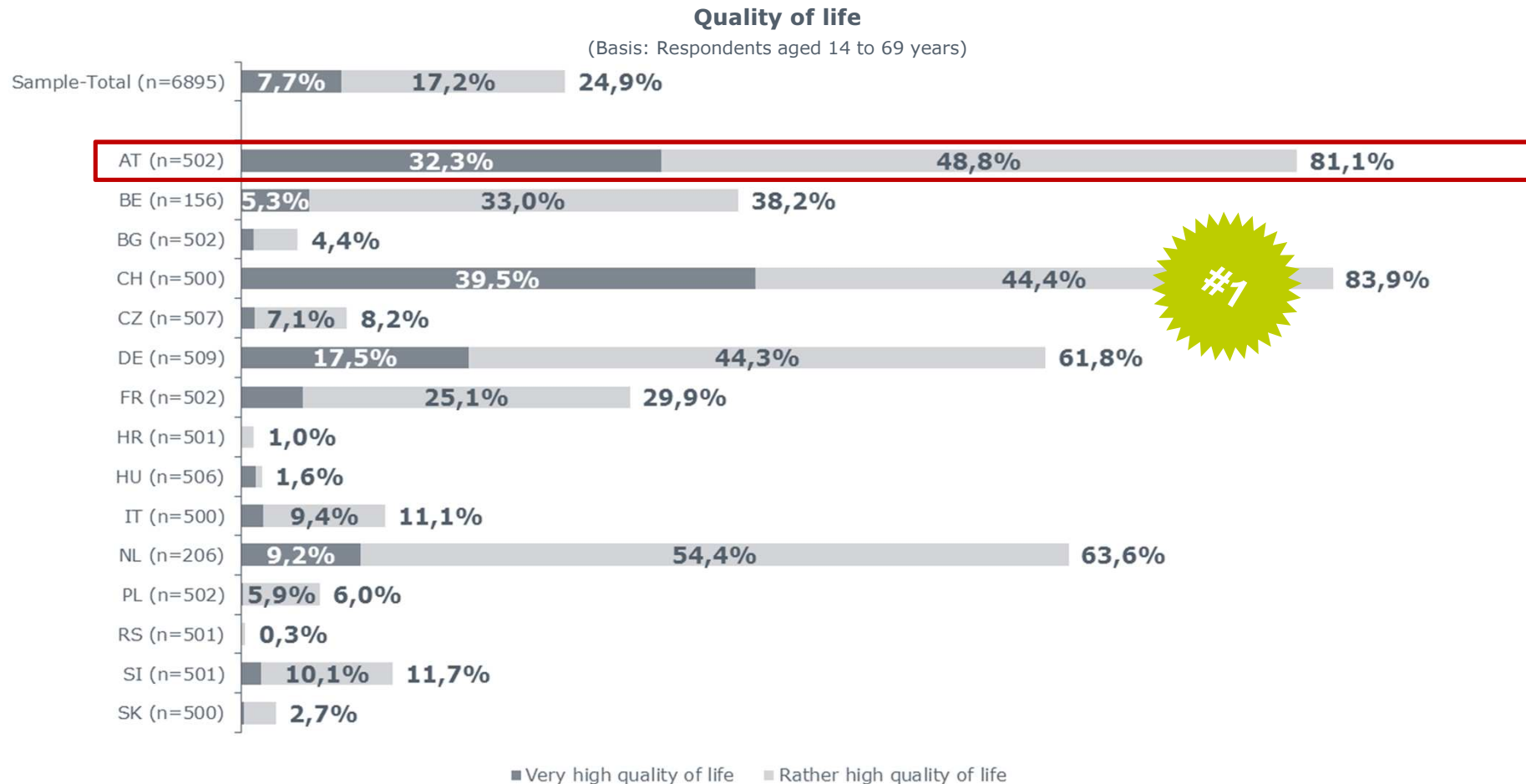
(Basis: Respondents aged 14 to 69 years)



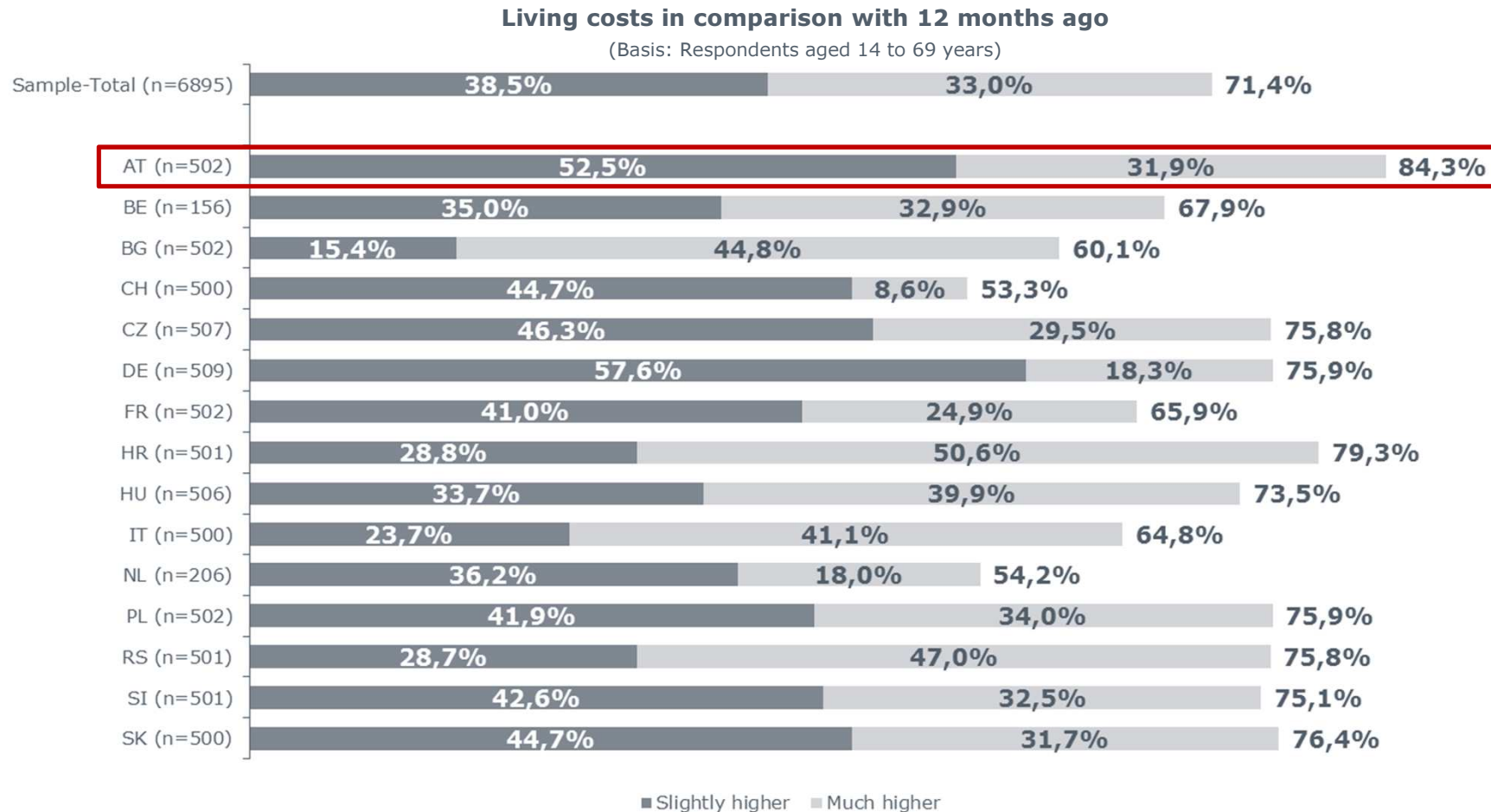
Quality of life: Die europäische Lebensqualität befindet sich auf einem leisen Rückmarsch.



Quality of life II: In der DACH-Region und den Niederlanden lässt es sich am besten leben.



Living costs in comparison with 12 months ago: Höchster Anstieg der wahrgenommenen Lebenserhaltungskosten in AT.



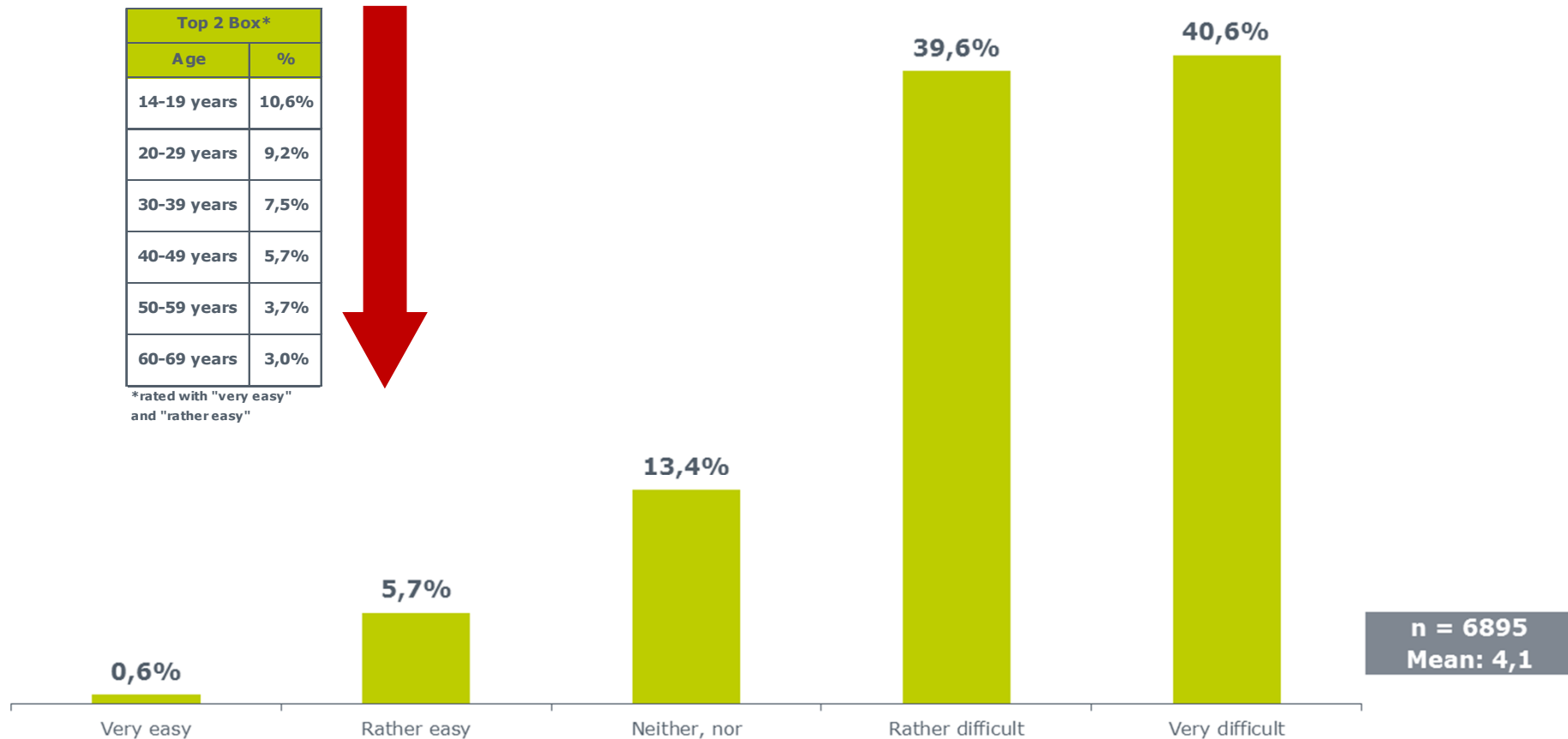
Simplicity of getting a job: Wenig überraschend: mit steigendem Alter wird es am Jobmarkt schwierig.

Simplicity of getting a job

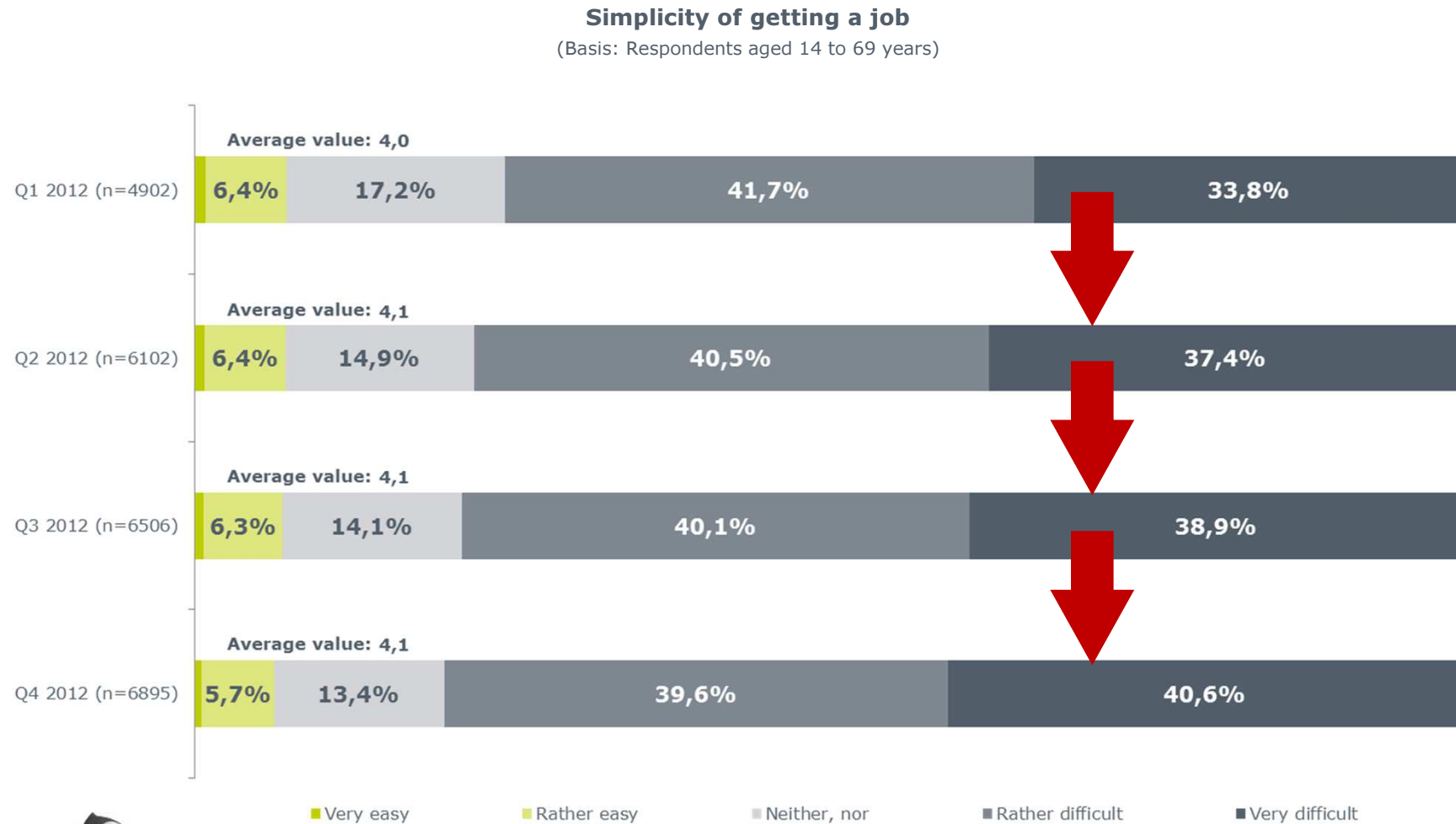
(Basis: Respondents aged 14 to 69 years)

Top 2 Box*	
Age	%
14-19 years	10,6%
20-29 years	9,2%
30-39 years	7,5%
40-49 years	5,7%
50-59 years	3,7%
60-69 years	3,0%

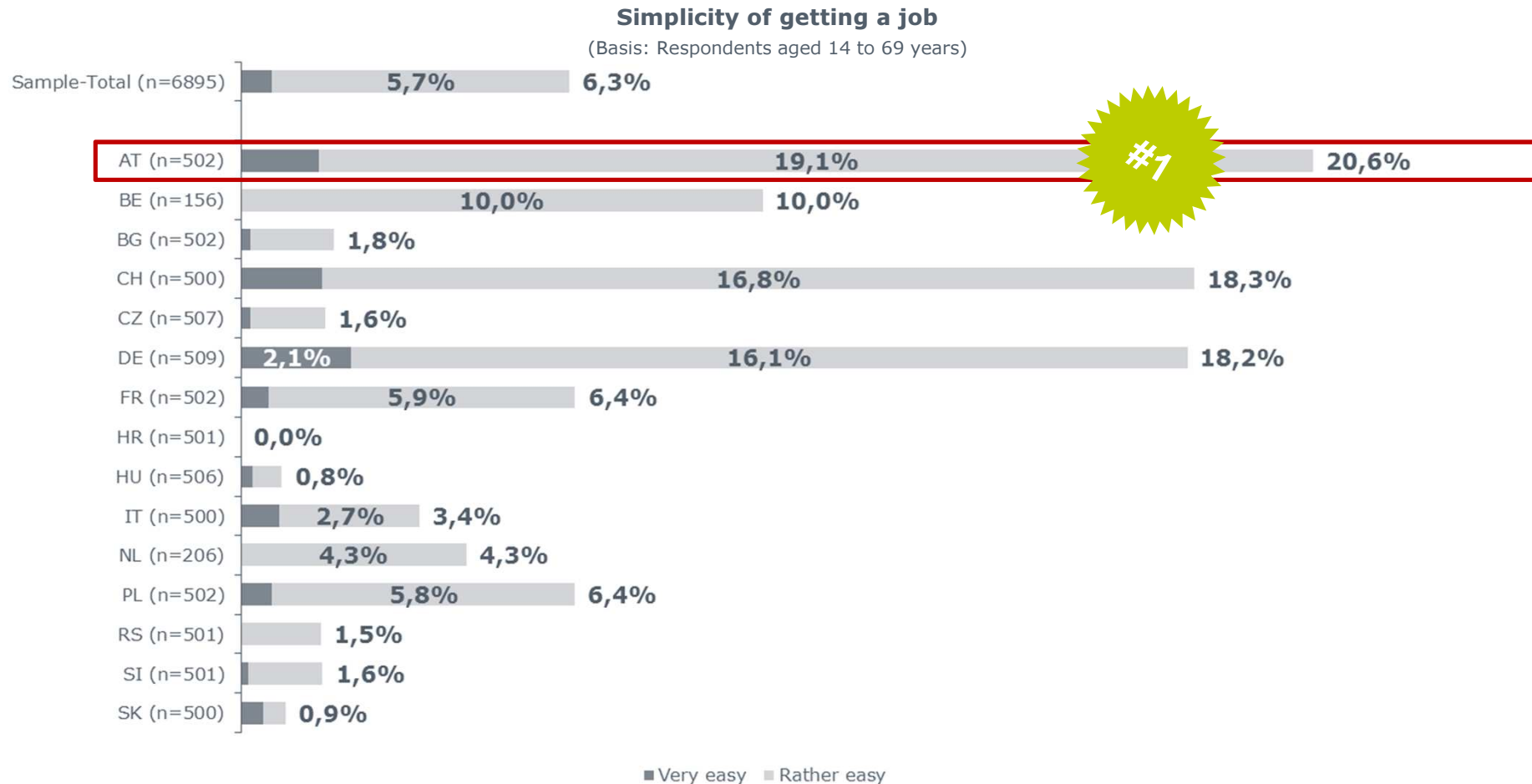
*rated with "very easy"
and "rather easy"



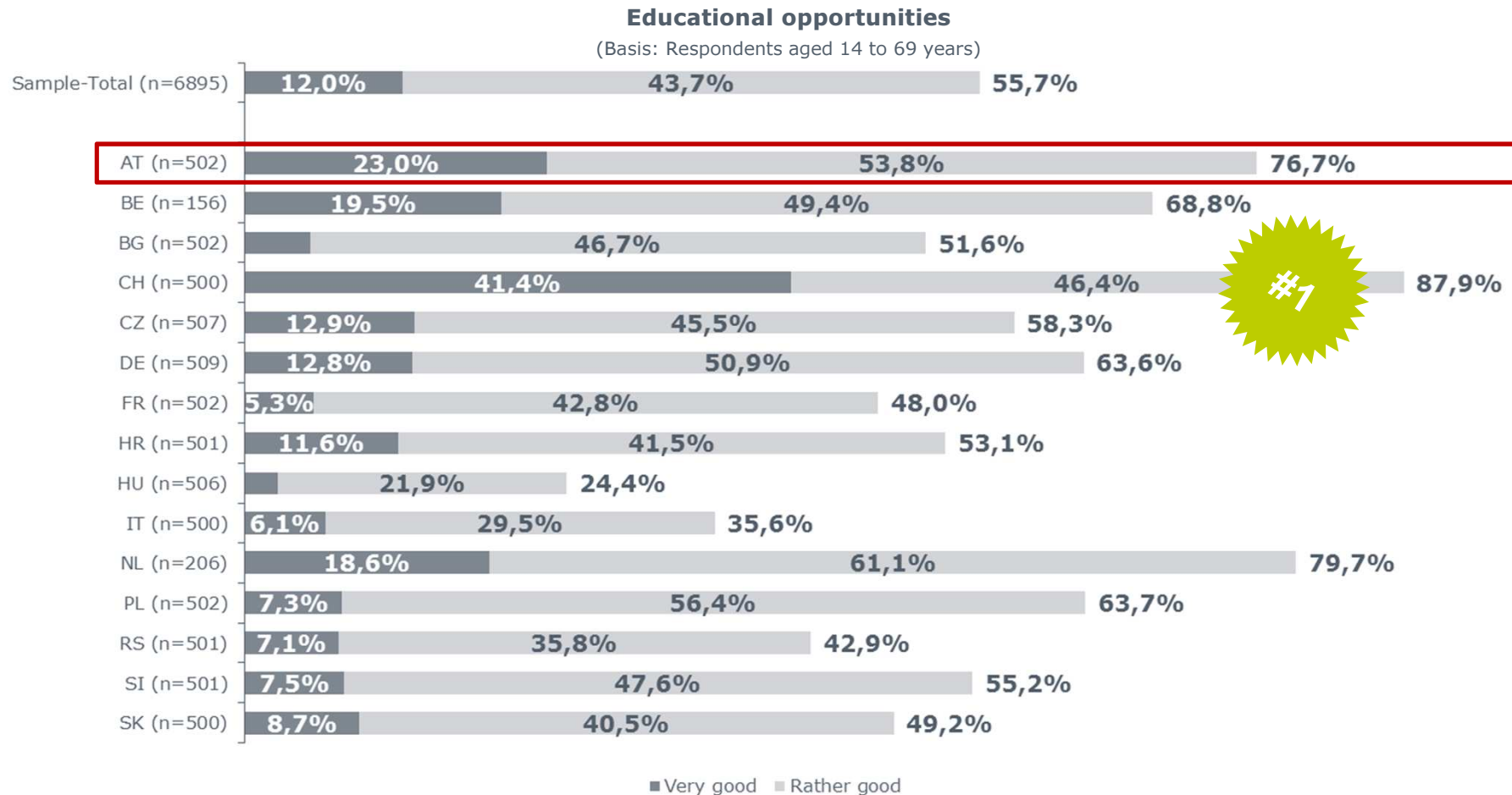
Simplicity of getting a job II: Der Arbeitsmarkt wird zunehmend angespannter wahrgenommen.



Simplicity of getting a job III: In Österreich scheint die Welt noch in Ordnung zu sein.



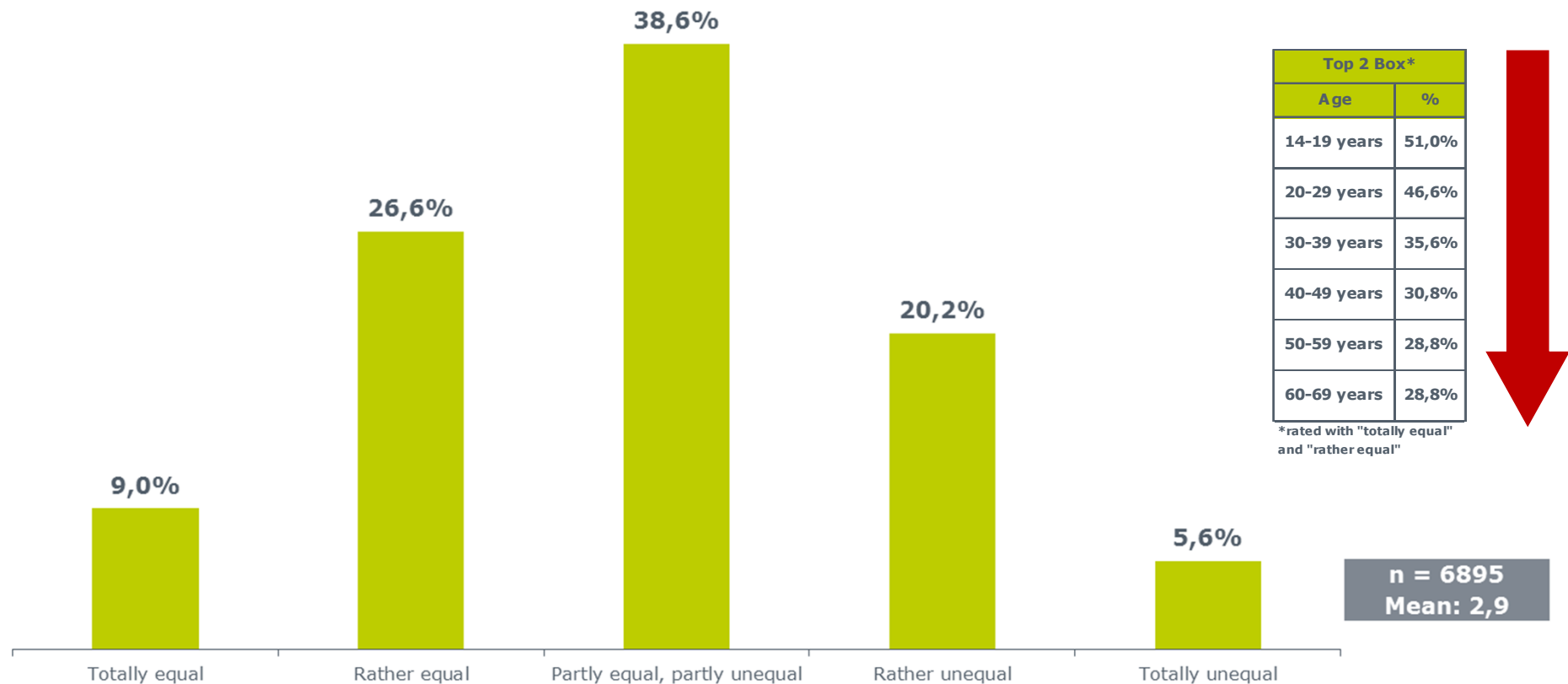
Educational opportunities: Podestplatz für Österreich hinsichtlich der Ausbildungsmöglichkeiten.



Equality between men and women: Gleichstellung zwischen Mann & Frau ist für die Jugend selbstverständlicher.

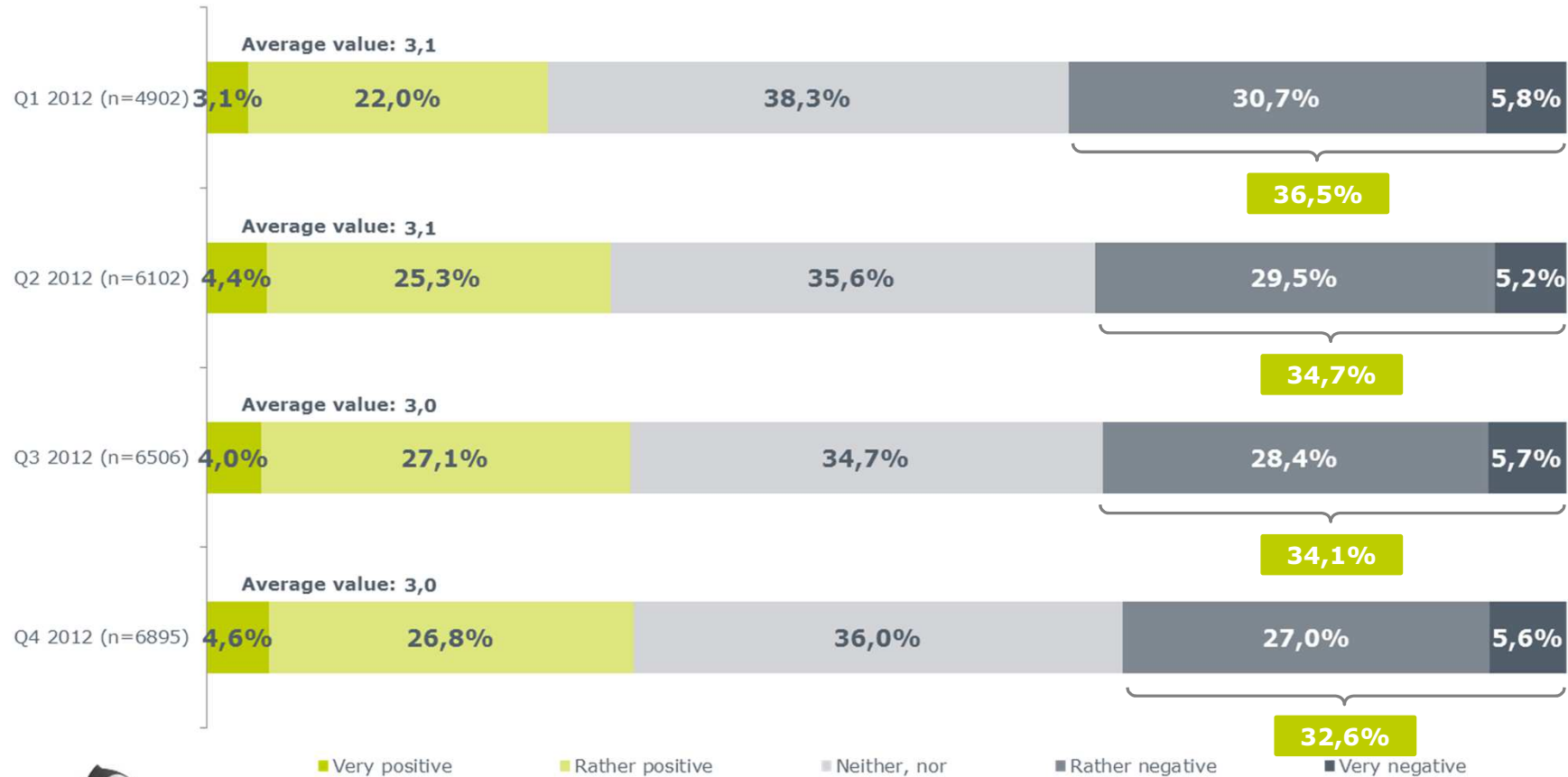
Equality between men and women (as to educational opportunities, income, opportunities for leadership positions, etc.)

(Basis: Respondents aged 14 to 69 years)

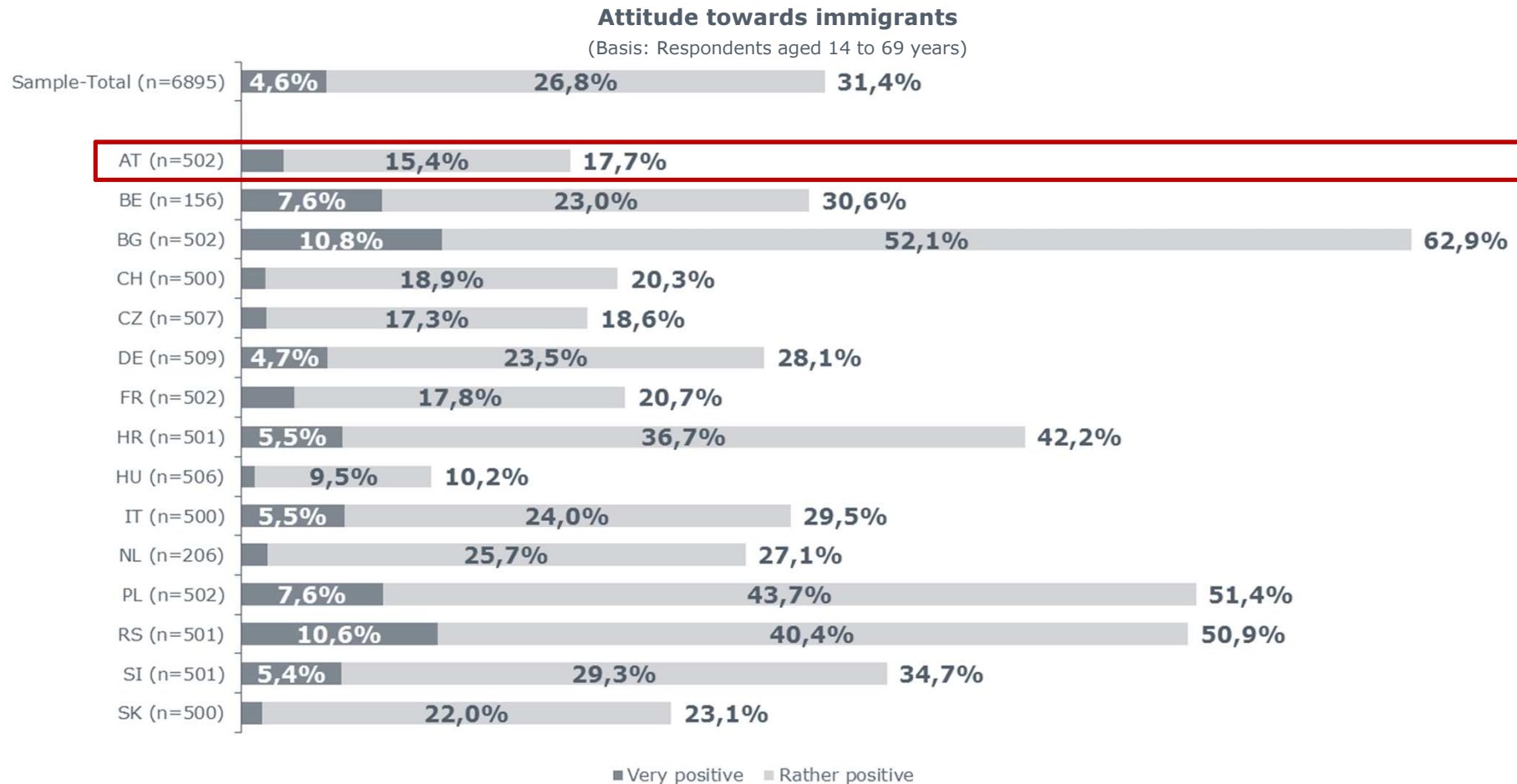


Attitude towards immigrants: Die Einstellung gegenüber Immigranten zeigt eine positive Entwicklung.

Attitude towards immigrants
(Basis: Respondents aged 14 to 69 years)



Attitude towards immigrants II: Leider hinkt Österreich aber massiv hinterher.



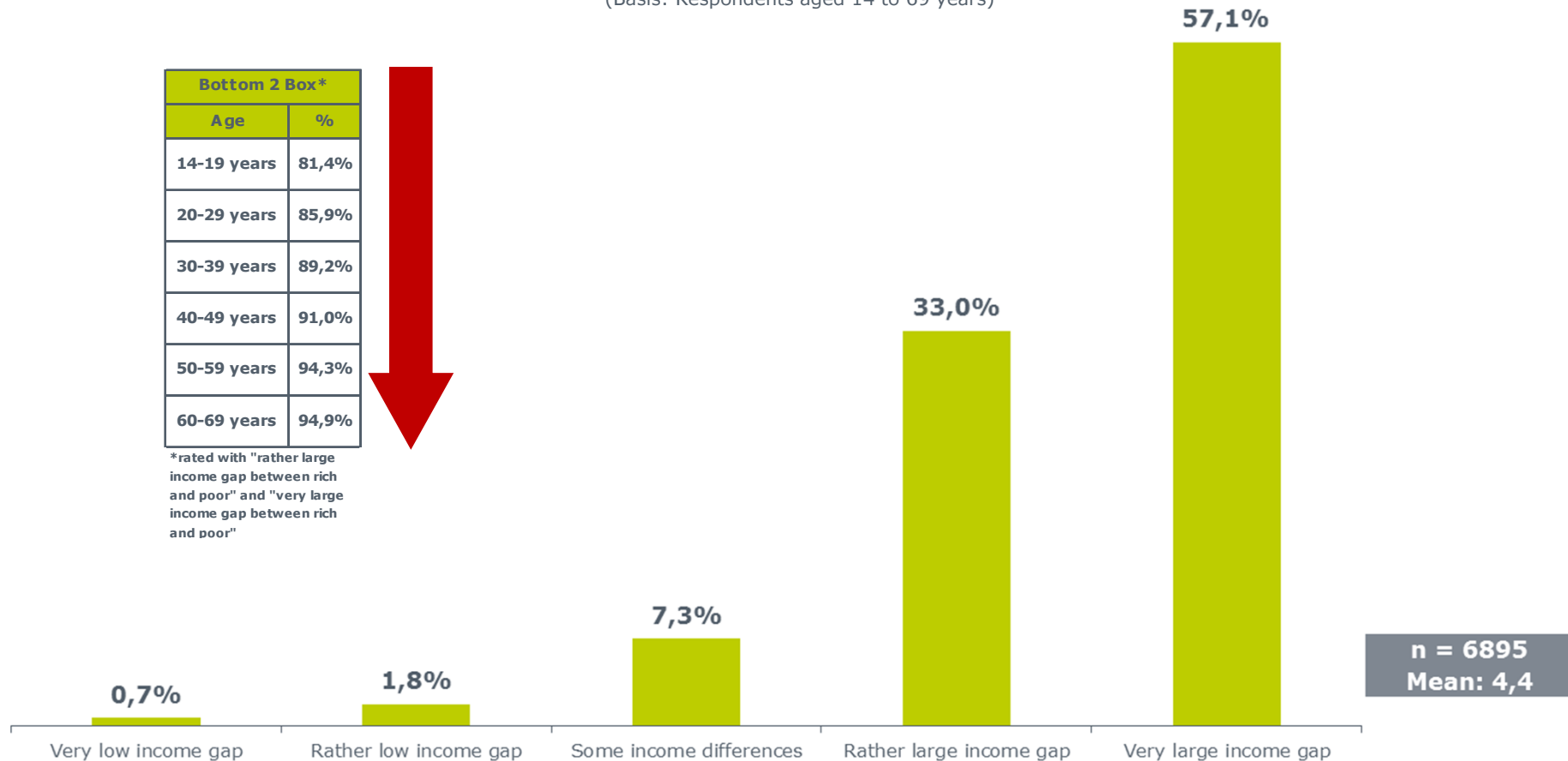
Income gap between rich and poor: Vor allem ältere Europäer spüren die Einkommensschere besonders stark.

Income gap between rich and poor

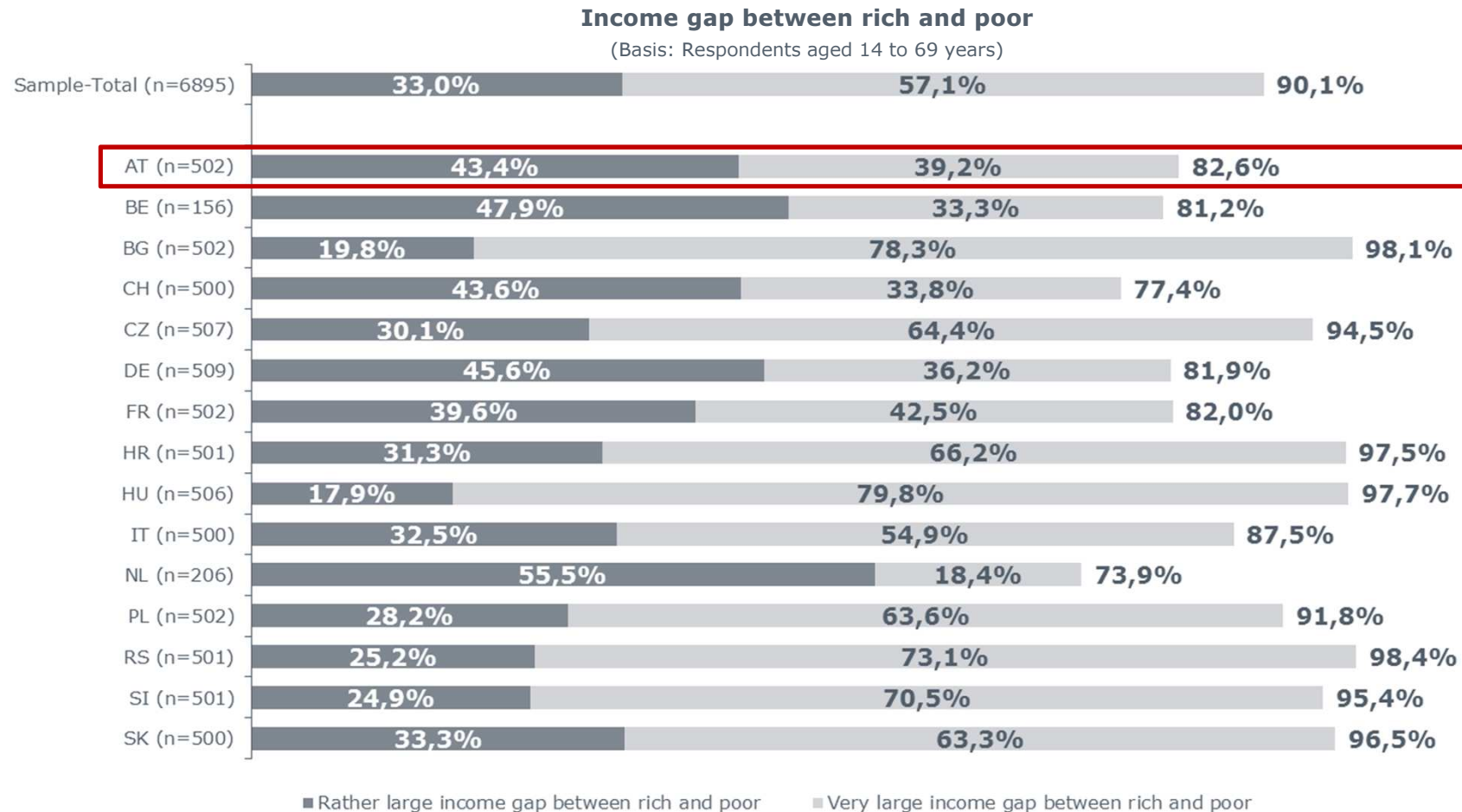
(Basis: Respondents aged 14 to 69 years)

Bottom 2 Box*	
Age	%
14-19 years	81,4%
20-29 years	85,9%
30-39 years	89,2%
40-49 years	91,0%
50-59 years	94,3%
60-69 years	94,9%

*rated with "rather large income gap between rich and poor" and "very large income gap between rich and poor"



Income gap between rich and poor II: Österreich liegt deutlich unter dem europäischen Schnitt.



Income gap between rich and poor III: Im Zeitverlauf zeigt die Situation in Österreich einen Tiefstwert.

Bottom 2 Box: rated with "rather large income gap between rich and poor" and "very large income gap between rich and poor"	Q1 2012	Q2 2012	Q3 2012	Q4 2012
Sample-Total	90,2%	90,9%	90,8%	90,1%
AT	77,3%	79,1%	78,9%	82,6%
BE	-	-	-	81,2%
BG	-	98,2%	95,3%	98,1%
CH	82,2%	78,1%	80,2%	77,4%
CZ	92,7%	95,6%	93,3%	94,5%
DE	78,9%	80,1%	81,3%	81,9%
FR	90,1%	83,9%	87,4%	82,0%
HR	98,0%	96,8%	96,1%	97,5%
HU	97,2%	98,8%	98,3%	97,7%
IT	88,1%	91,8%	88,1%	87,5%
NL	-	-	-	73,9%
PL	-	94,0%	91,9%	91,8%
RS	99,1%	98,7%	98,6%	98,4%
SI	96,4%	96,4%	96,5%	95,4%
SK	94,5%	94,9%	94,9%	96,5%

(Basis: Respondents aged 14 to 69 years)



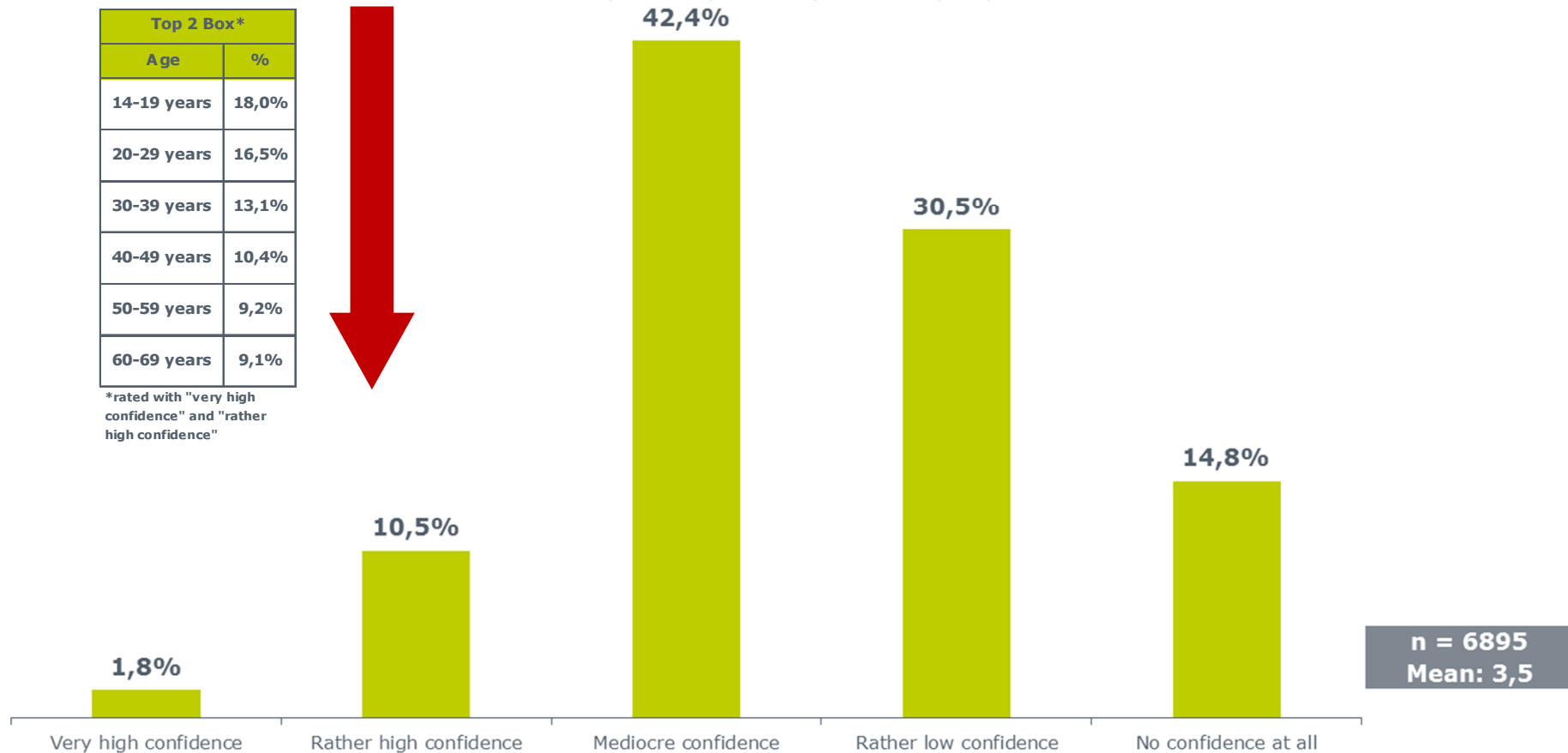
Confidence in the national financial institutions: Mit zunehmendem Alter geht das Vertrauen verloren.

Confidence in the national financial institutions

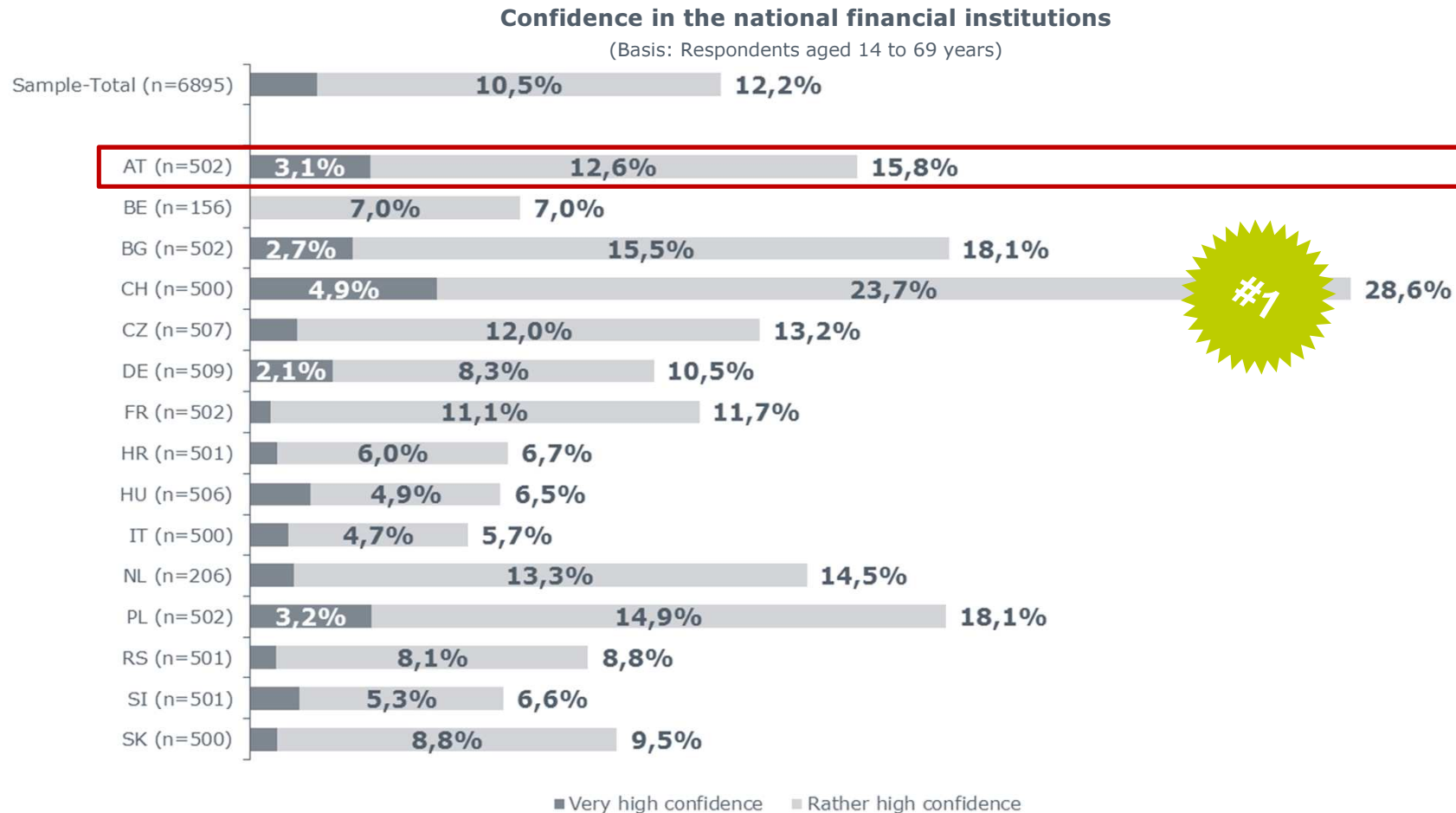
(Basis: Respondents aged 14 to 69 years)

Top 2 Box*	
Age	%
14-19 years	18,0%
20-29 years	16,5%
30-39 years	13,1%
40-49 years	10,4%
50-59 years	9,2%
60-69 years	9,1%

*rated with "very high confidence" and "rather high confidence"



Confidence in the national financial institutions II: In der Schweiz ist das Vertrauen nahezu doppelt so hoch wie in Österreich.



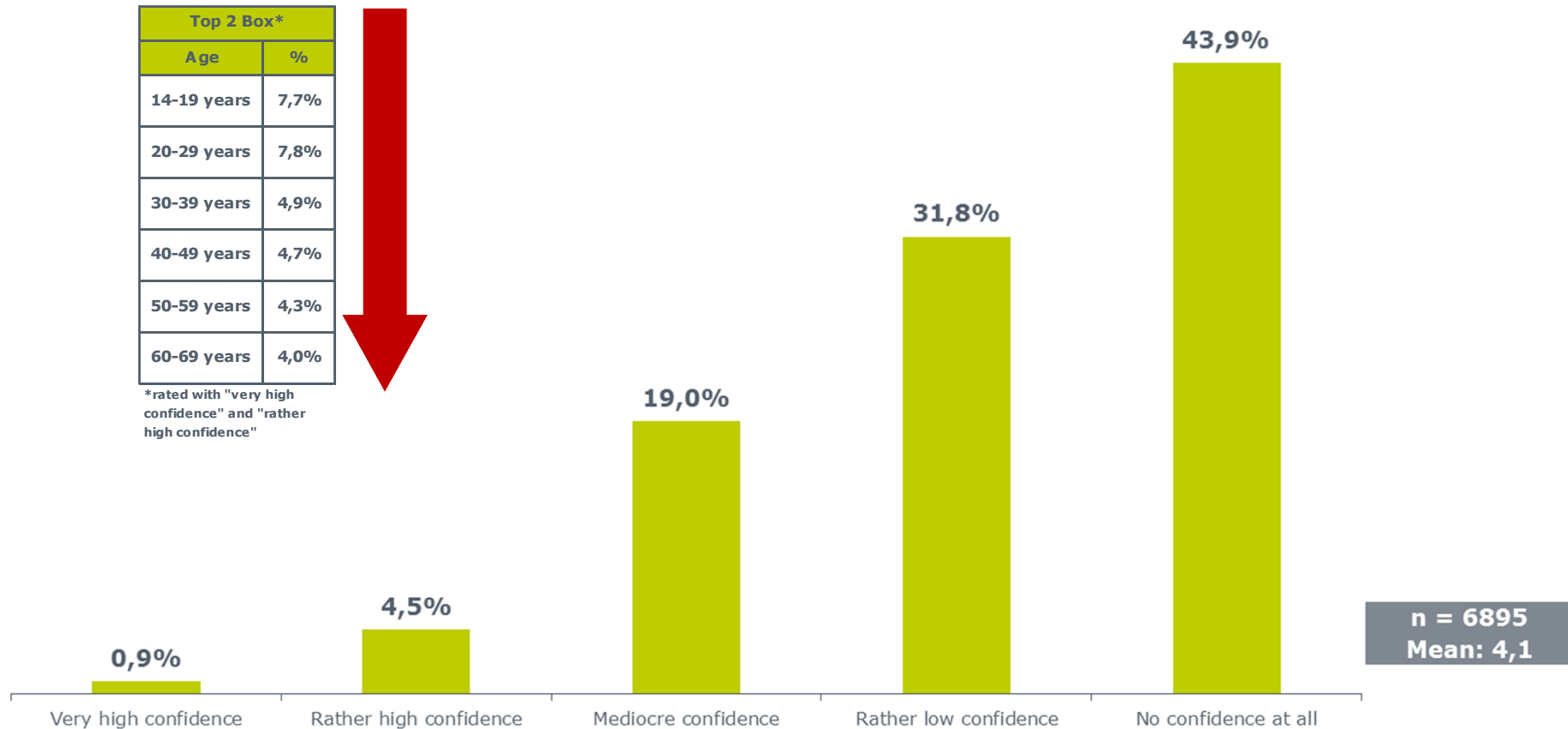
Confidence in the national politics: Je älter, desto größer die Politikverdrossenheit.

Confidence in the national politics

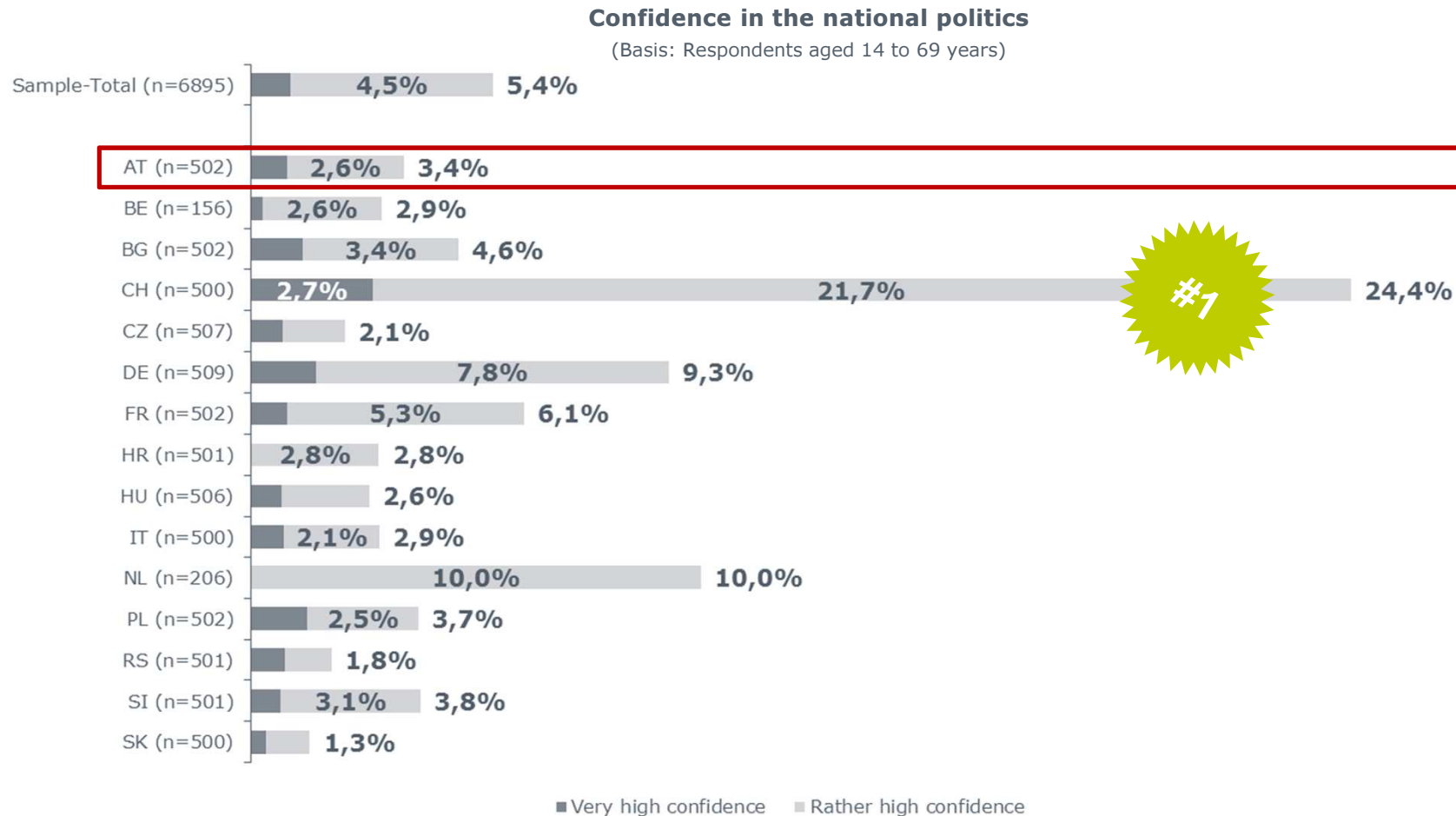
(Basis: Respondents aged 14 to 69 years)

Top 2 Box*	
Age	%
14-19 years	7,7%
20-29 years	7,8%
30-39 years	4,9%
40-49 years	4,7%
50-59 years	4,3%
60-69 years	4,0%

*rated with "very high confidence" and "rather high confidence"



Confidence in the national politics II: Lediglich 3,4% der Österreicher signalisieren Vertrauen in die Politik.



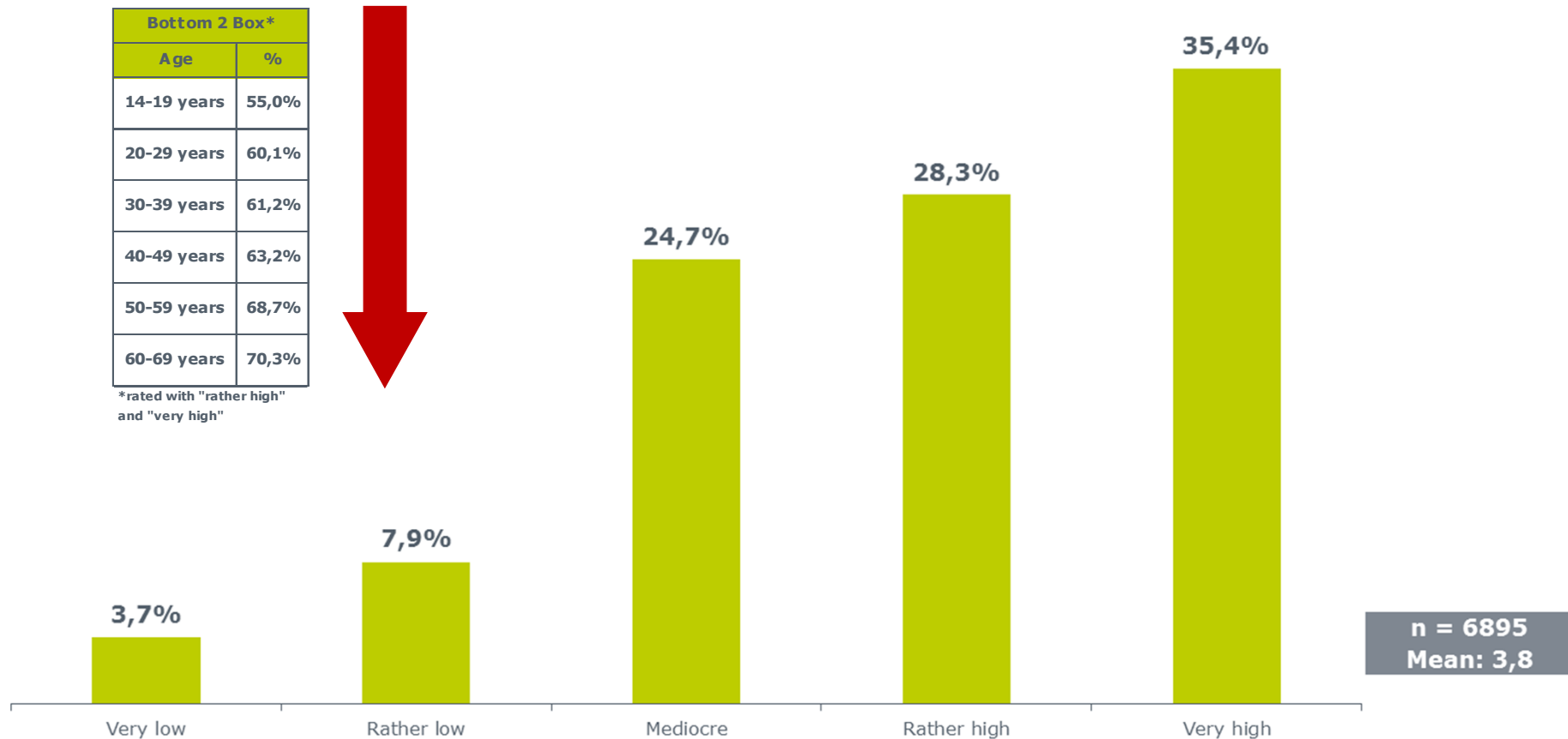
Desire for political reforms: Der Ruf nach politischen Reformen ist laut.

Desire for political reforms

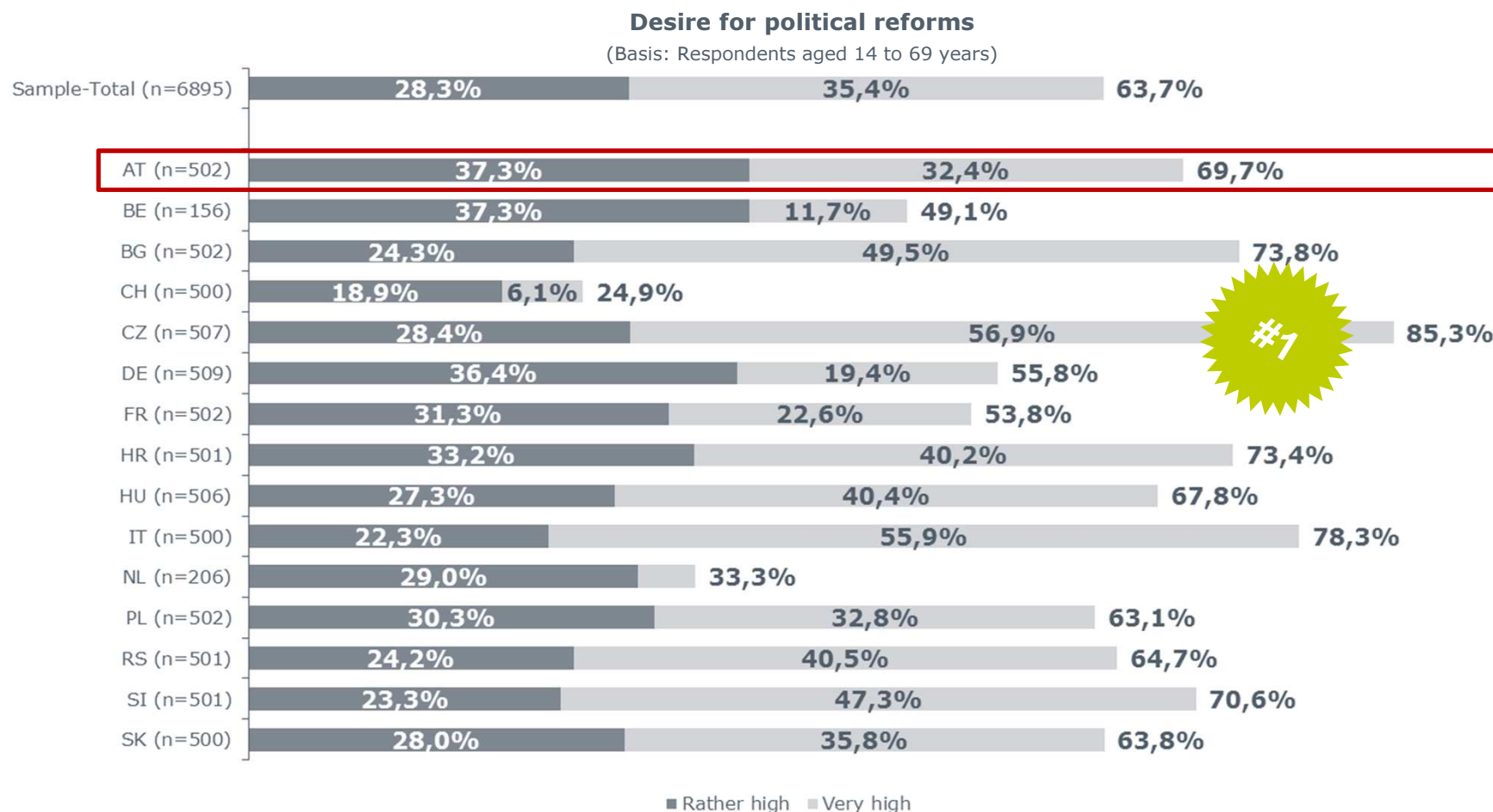
(Basis: Respondents aged 14 to 69 years)

Bottom 2 Box*	
Age	%
14-19 years	55,0%
20-29 years	60,1%
30-39 years	61,2%
40-49 years	63,2%
50-59 years	68,7%
60-69 years	70,3%

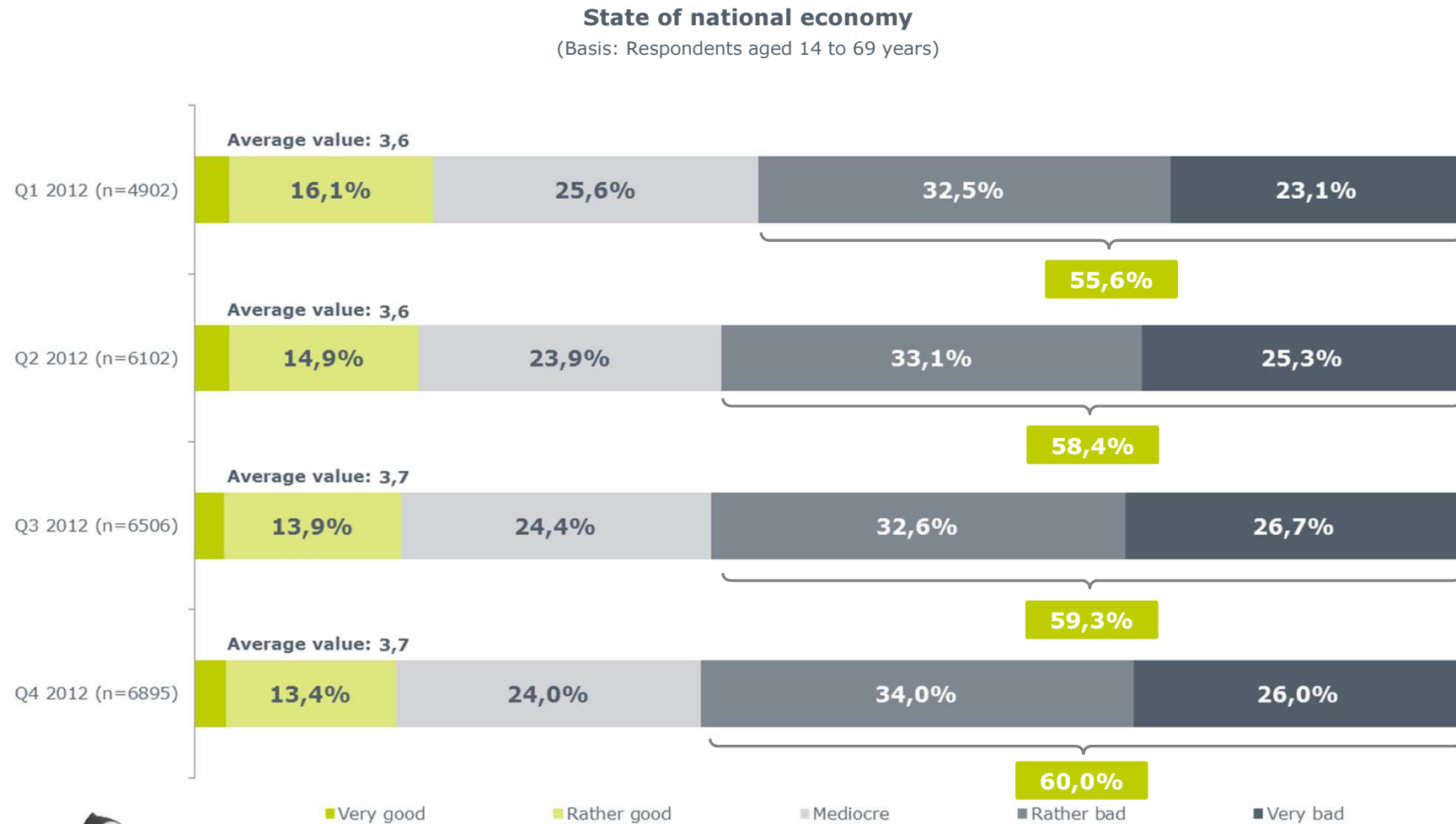
*rated with "rather high"
and "very high"



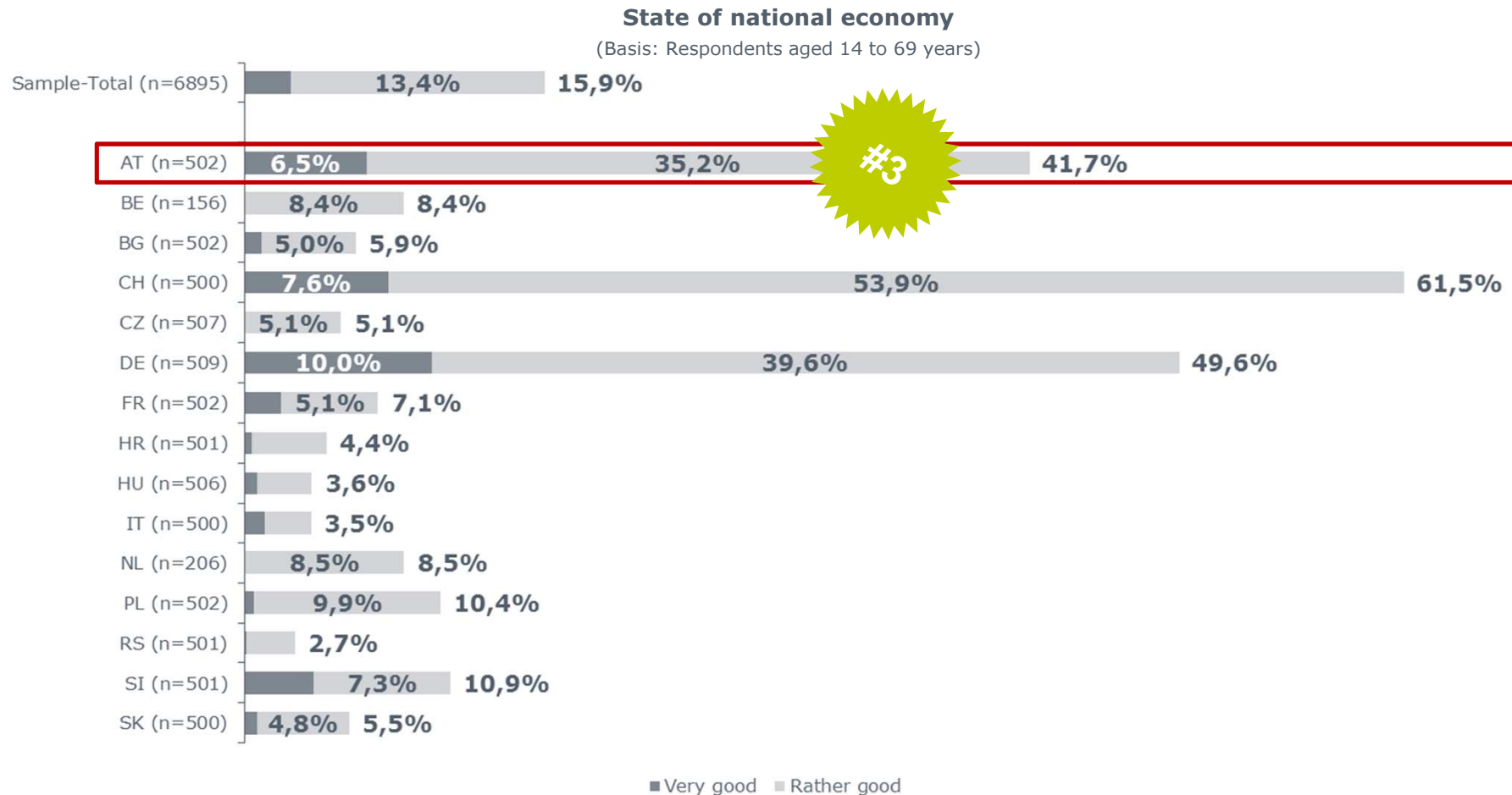
Desire for political reforms II: Speziell in der Tschechischen Republik wünscht man sich Veränderung.



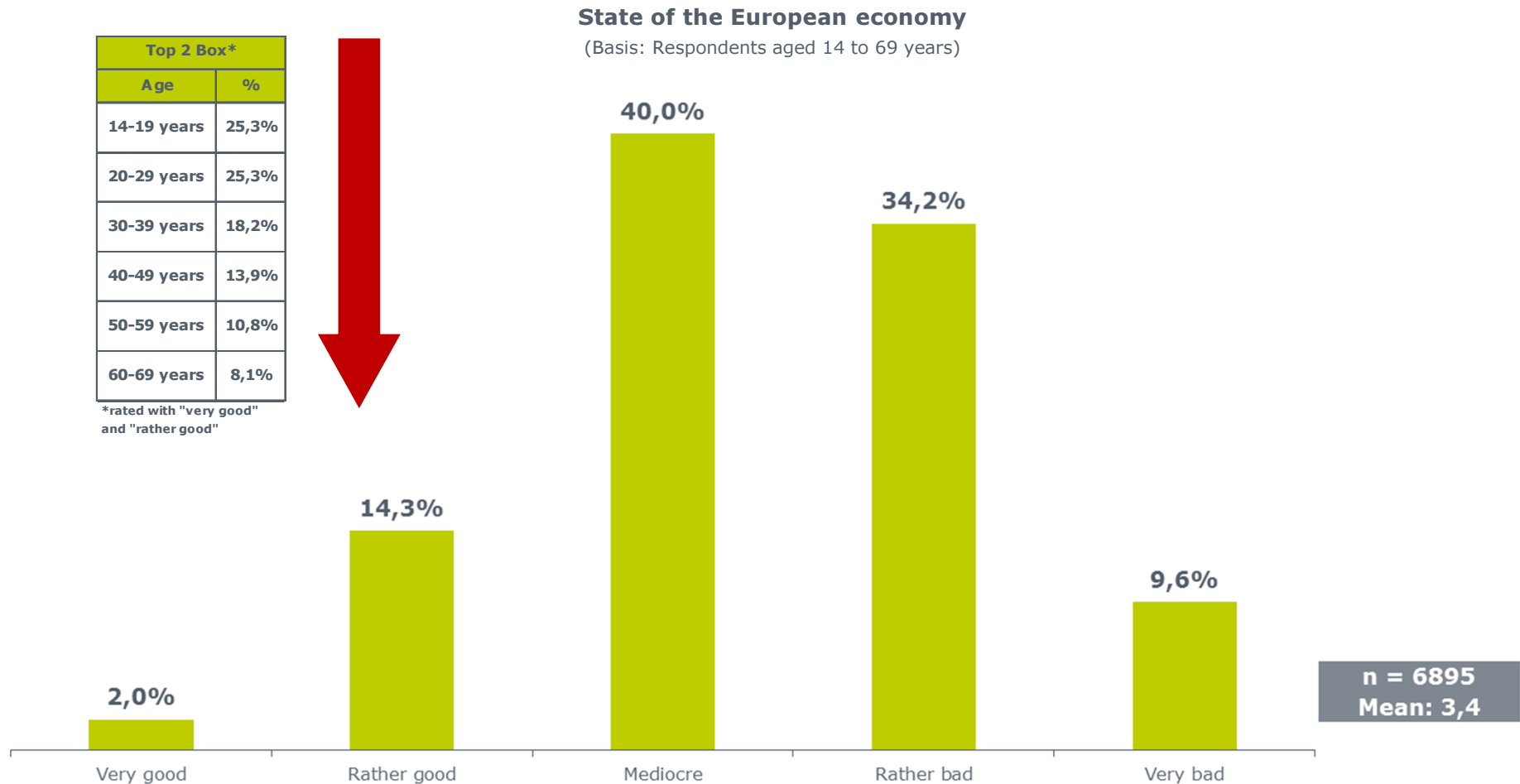
State of national economy: Die Situation der heimischen Wirtschaft wird zunehmend negativ beurteilt.



State of national economy II: In der DACH-Region erlebt man die Wirtschaft vergleichsweise florierend.



State of the European economy: Junge Europäer beurteilen die europäische Wirtschaftslage positiver.

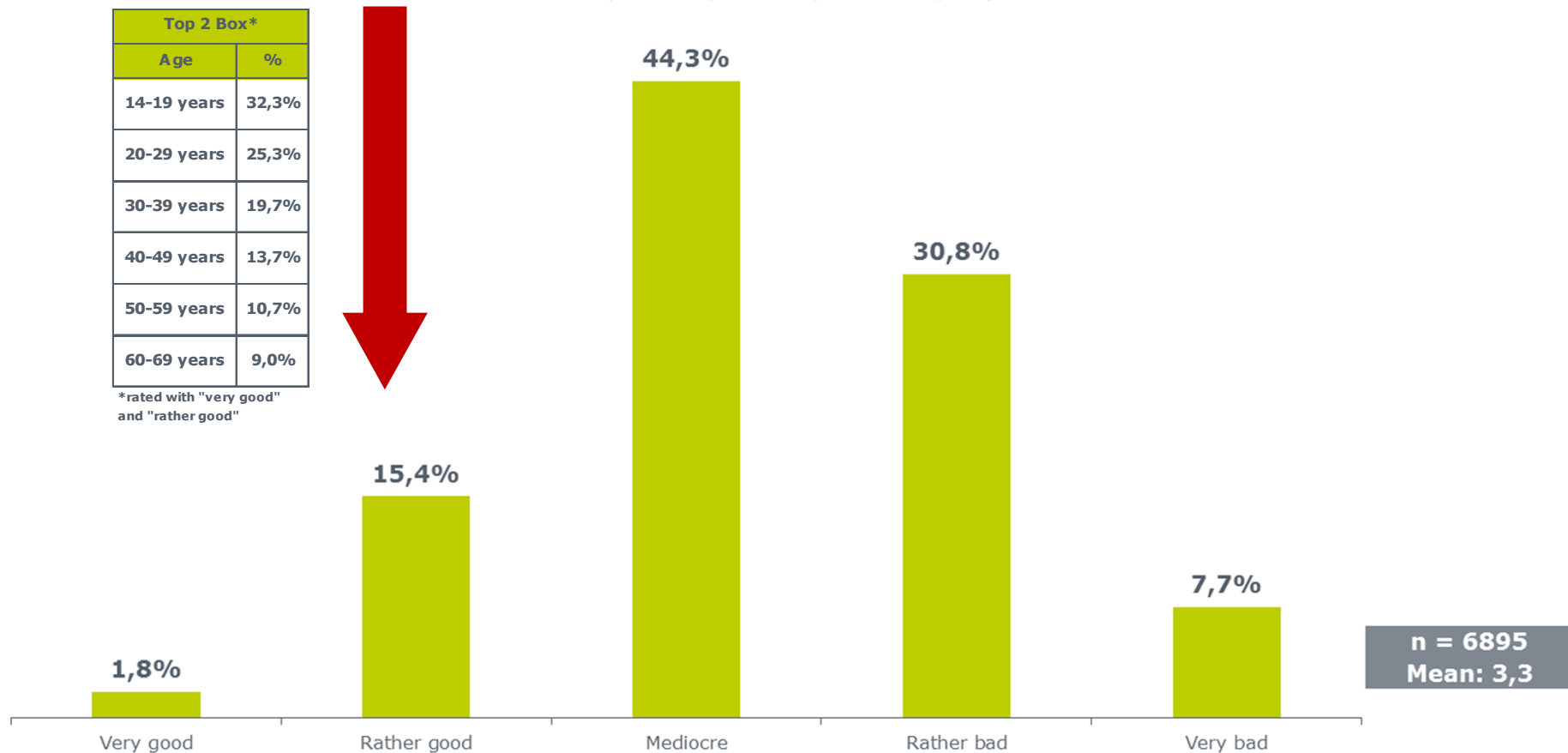


State of the global economy: Die Weltwirtschaft wird mit steigendem Alter weniger rosig wahrgenommen.

State of the global economy
(Basis: Respondents aged 14 to 69 years)

Top 2 Box*	
Age	%
14-19 years	32,3%
20-29 years	25,3%
30-39 years	19,7%
40-49 years	13,7%
50-59 years	10,7%
60-69 years	9,0%

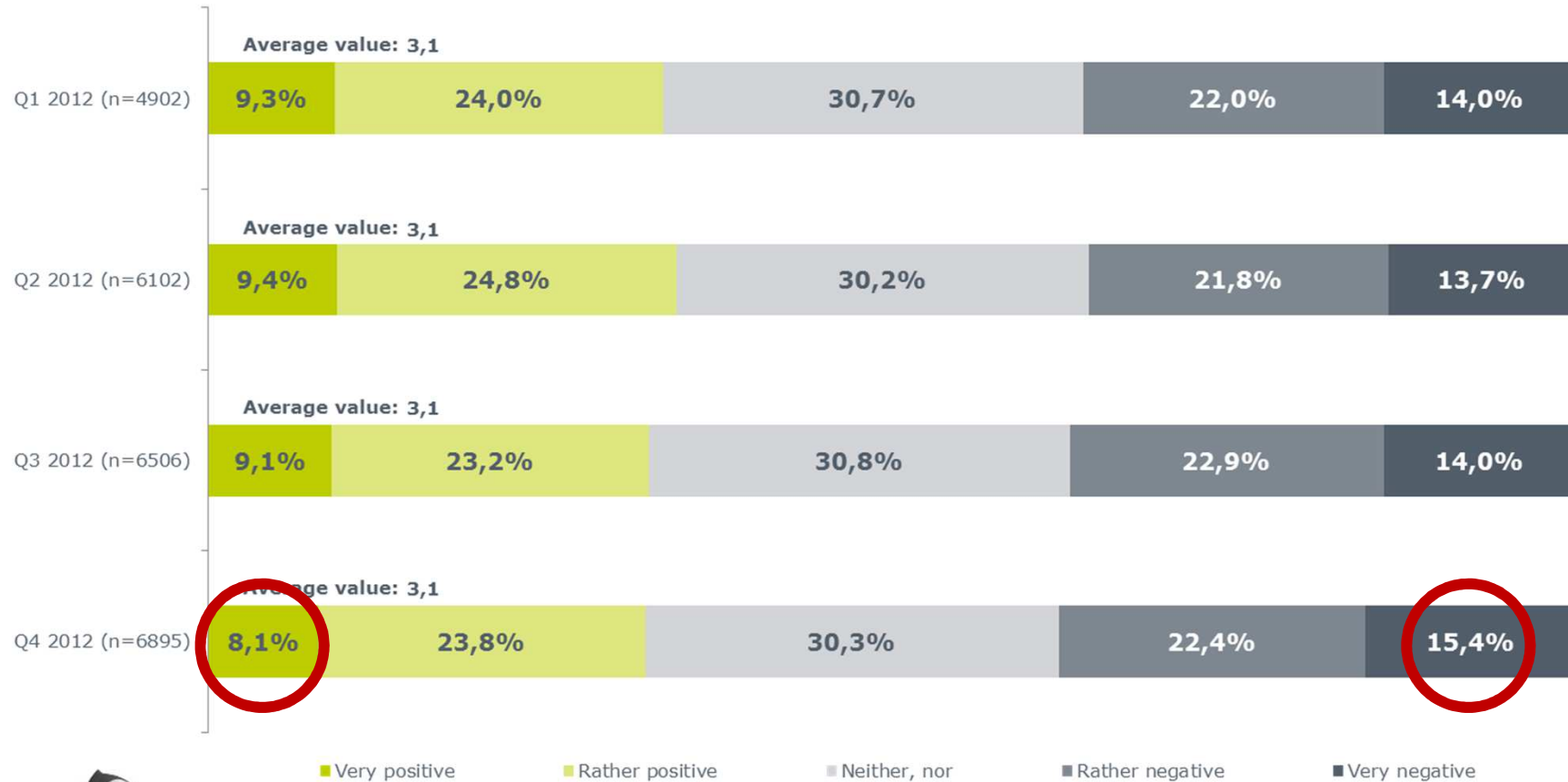
*rated with "very good"
and "rather good"



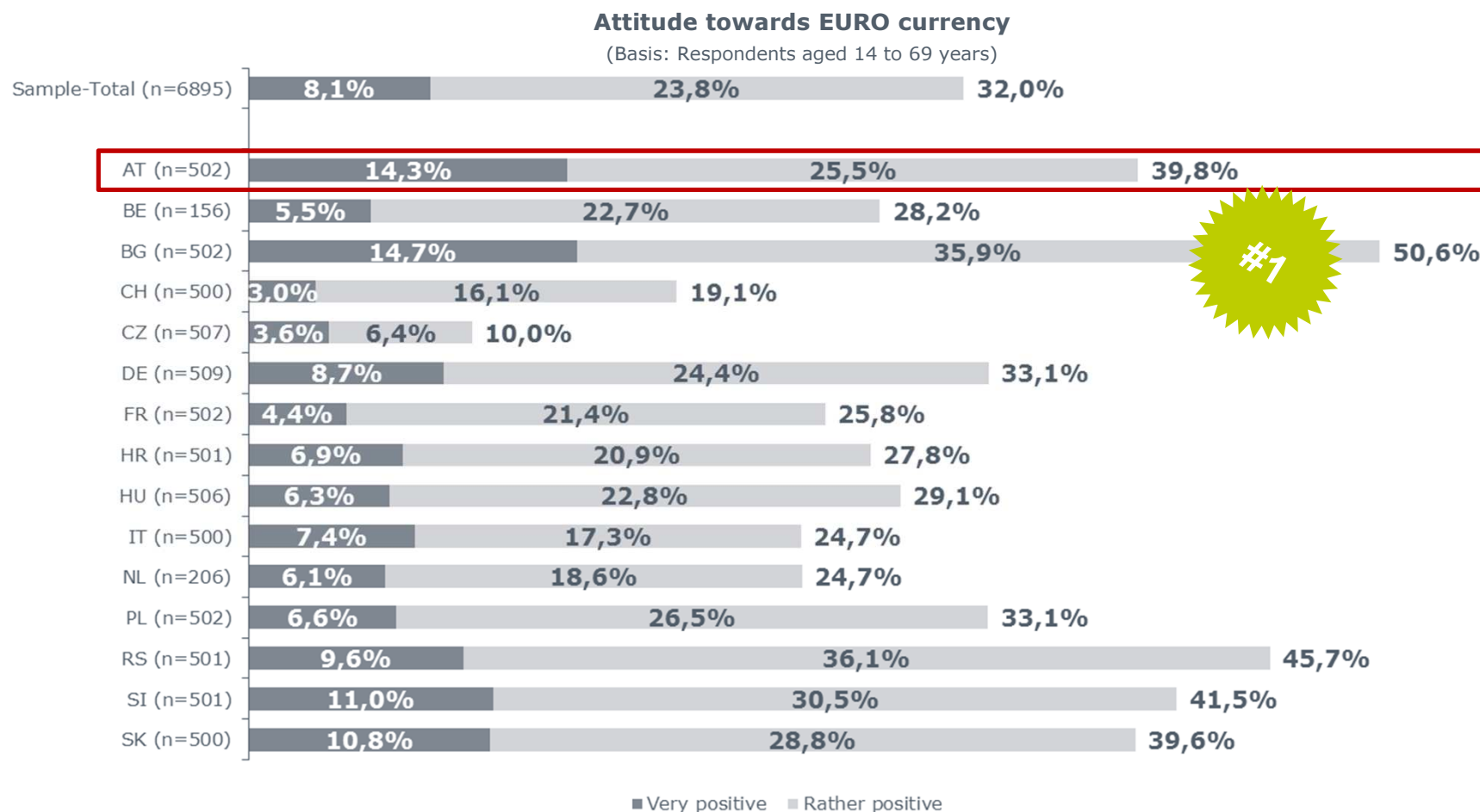
Attitude towards EURO currency: Die Einstellung zum EURO zeigt im 4. Quartal Tiefstwerte.

Attitude towards EURO currency

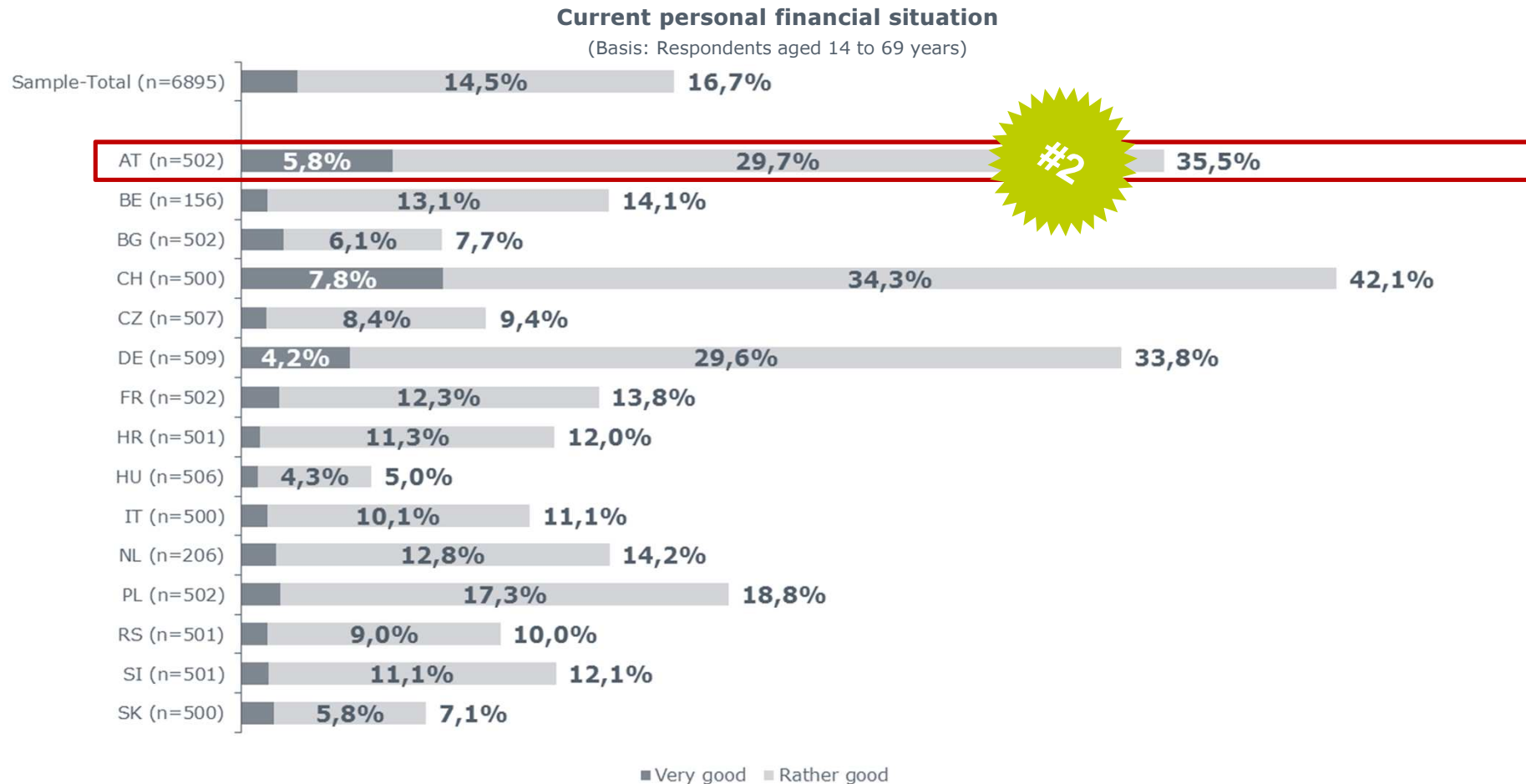
(Basis: Respondents aged 14 to 69 years)



Attitude towards EURO currency II: In Bulgarien steht der EURO hoch im Kurs.



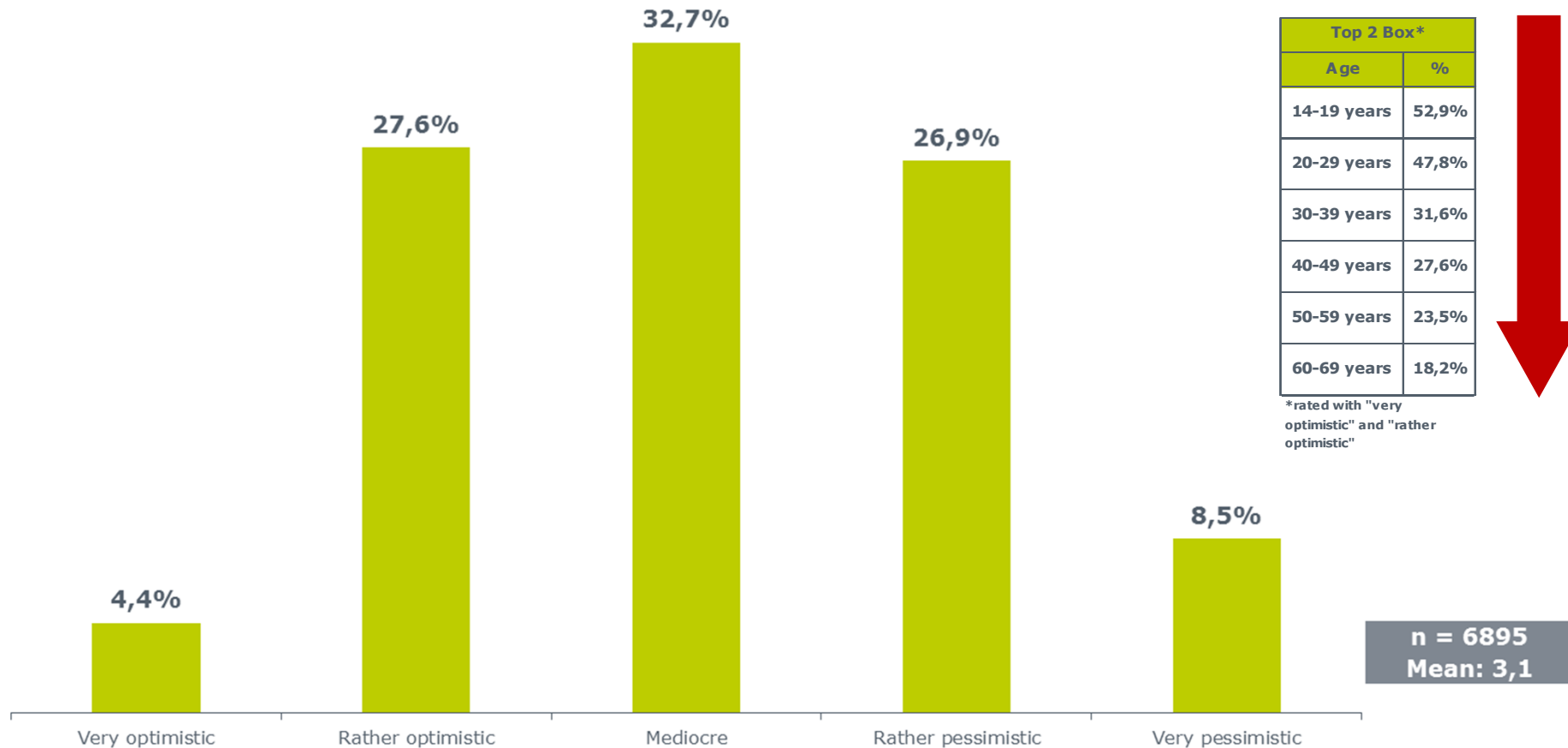
Current personal financial situation: Die Österreicher sind mit Ihrer finanziellen Situation vgl.weise zufrieden.



Expectations for future personal financial situation: Die Jugend sieht ihrer finanziellen Zukunft deutlich positiver entgegen.

Expectations for future personal financial situation

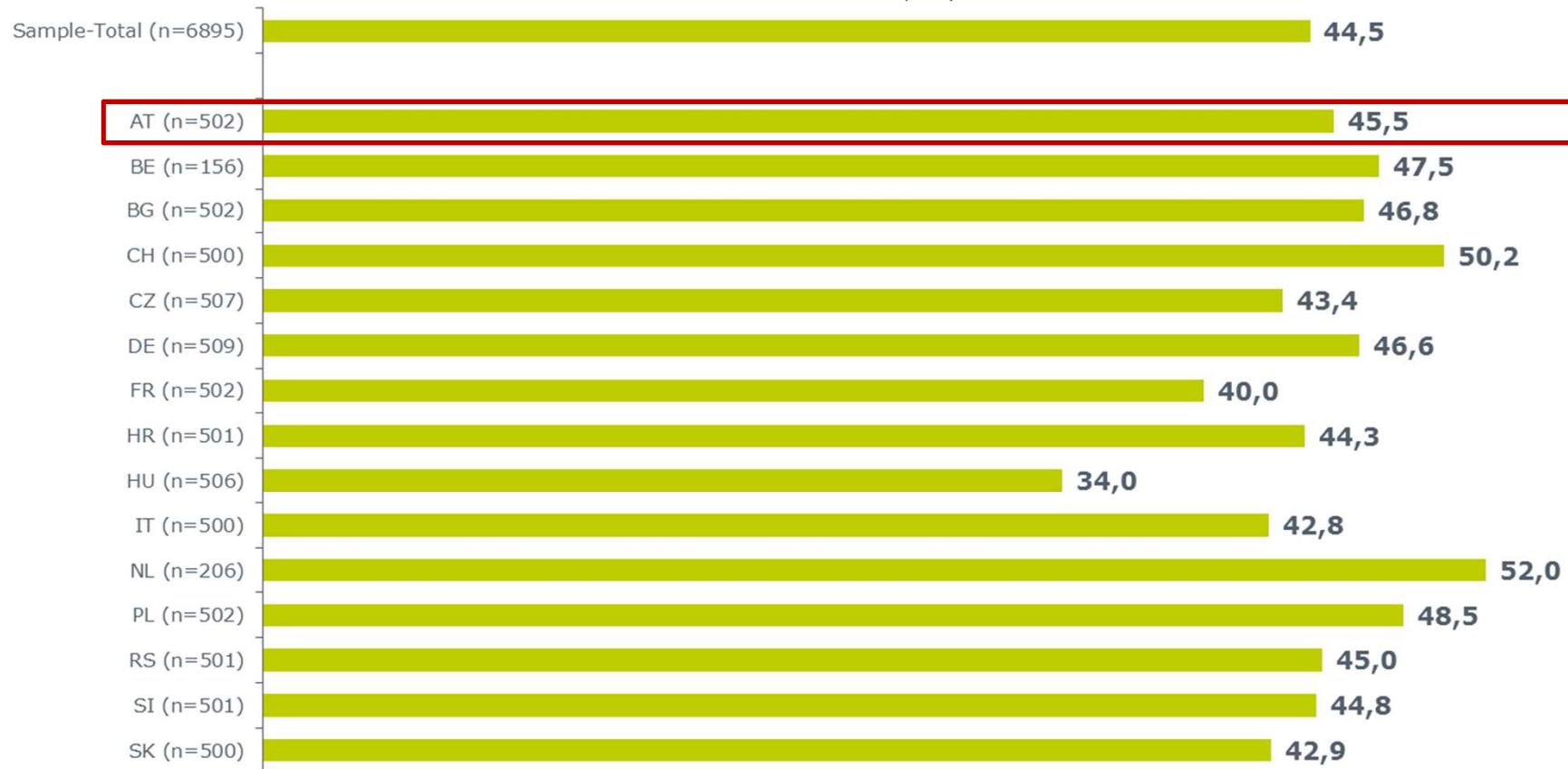
(Basis: Respondents aged 14 to 69 years)



FAIRNESS INDEX

FAIRNESS INDEX

(FAIRNESS INDEX was calculated on basis of following questions: Educational opportunities, equality between men and women, attitude towards immigrants, income gap between rich and poor)



Sample structure

Basis	Sample Total	AT	BE	BG	CH	CZ	DE	FR	HR	HU	IT	NL	PL	RS	SI	SK
	6.895	502	156	502	500	507	509	502	501	506	500	206	502	501	501	500
Gender																
Male	50,0%	49,8%	41,6%	49,3%	50,3%	50,2%	50,5%	45,5%	51,7%	48,9%	49,6%	47,3%	49,4%	57,9%	51,1%	49,6%
Female	50,0%	50,2%	58,4%	50,7%	49,7%	49,8%	49,5%	54,5%	48,3%	51,1%	50,4%	52,7%	50,6%	42,1%	48,9%	50,4%
Age																
14-19 years	8,6%	9,5%	8,6%	8,0%	9,2%	8,4%	8,4%	10,7%	8,1%	9,3%	8,1%	5,6%	9,8%	5,3%	8,0%	9,8%
20-29 years	17,9%	17,4%	18,8%	18,9%	17,2%	17,9%	16,8%	17,2%	19,0%	17,8%	15,1%	11,3%	21,1%	18,2%	17,8%	20,4%
30-39 years	19,4%	18,0%	15,9%	20,5%	18,7%	22,3%	16,6%	20,8%	17,5%	21,6%	20,4%	15,4%	20,0%	16,5%	20,1%	21,5%
40-49 years	19,9%	22,6%	21,1%	19,0%	22,0%	17,5%	23,2%	19,9%	17,3%	17,3%	22,4%	24,3%	16,5%	20,8%	20,1%	17,6%
50-59 years	19,6%	18,0%	19,9%	18,5%	18,1%	17,8%	19,7%	16,9%	23,3%	19,0%	18,1%	27,6%	19,9%	23,8%	19,9%	18,5%
60-69 years	14,7%	14,5%	15,7%	15,2%	14,7%	16,2%	15,3%	14,5%	14,7%	15,1%	15,9%	15,9%	12,7%	15,4%	14,2%	12,2%



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