



Paris, December 19 2008

## The morale of Europeans and Americans at the lowest

A **Harris Interactive** exclusive poll, in partnership with the channel of international information **FRANCE 24** and the *International Herald Tribune*

The latest **Harris Interactive / FRANCE 24 / International Herald Tribune** poll looks at international opinion as 2008 draws to a close. This poll shows a true concern and unprecedented pessimism among Europeans with a major consequence: a noticeable decrease of the budget allocated to the holiday season. 2008 left a deep mark on 2 subjects: a worry with the worldwide financial crisis and a hope with the election of Barack Obama.

Results to be released on December 19<sup>th</sup> 2008 on FRANCE 24's "Business News" and published in the *International Herald Tribune* of December 19<sup>th</sup> 2008

### **Methodology**

*The latest poll was conducted online by Harris Interactive, in partnership with FRANCE 24 and The International Herald Tribune, among a total of 6,165 adults (aged 16-64) within France, Germany, Great Britain, Spain and the United-States; and adults (aged 18-64) in Italy, from 26th November to 8th December 2008. The data were weighted, where necessary, by age, gender, education, region and Internet usage to make it representative of the general population profile for each country. Propensity score weighting was applied to adjust for respondents' propensity to be online.*

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The poll explores a variety of issues, including:

- The morale of populations at the end of 2008, and a comparison to morale at the end of 2006
- The most significant international events of 2008
- The impact of the election of Barack Obama
- Changes expected for 2009
- The budget allocated for the 2008 holiday season

*Please note that any communication of these results has to be made with technical elements such as: survey methodology, fieldwork dates, name of the agency, sample size.*

**THE MORALE OF POPULATIONS AT THE END OF 2008, AND A COMPARISON TO MORALE AT THE END OF 2006**





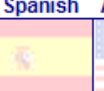

At the end of 2008, the current morale of some Europeans and Americans shows a true concern which is tied to the current economic situation in their country.

These Europeans show a real pessimism, specifically the French where 83% say they are pessimistic (including 25% who are very pessimistic).

Americans, who just elected a new President, seem to be less worried about the economic situation in their country, even if half of them say they are pessimistic.

**Regarding the economic status of your country, would you say that you are today ...?**





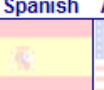

*Base : All Respondents*

						
<i>Unweighted Base</i>	1,034	1,074	1,111	997	949	1,000
<b>Very + Somewhat optimistic (4+5)</b>	<b>17%</b>	<b>37%</b>	<b>30%</b>	<b>26%</b>	<b>30%</b>	<b>48%</b>
Very optimistic (4)	*	3%	4%	2%	2%	8%
Somewhat optimistic (3)	16%	34%	26%	24%	27%	40%
<b>Very + Somewhat pessimistic (1+2)</b>	<b>83%</b>	<b>63%</b>	<b>70%</b>	<b>74%</b>	<b>70%</b>	<b>52%</b>
Somewhat pessimistic (2)	58%	52%	56%	53%	46%	40%
Very pessimistic (1)	25%	11%	14%	20%	25%	12%
<b>Mean</b>	<b>1,9</b>	<b>2,3</b>	<b>2,2</b>	<b>2,1</b>	<b>2,1</b>	<b>2,4</b>

This economic crisis is not only a general perception: people are also concerned about their personal economic situation. Again, Europeans seem to be the most concerned.

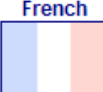
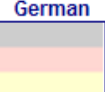


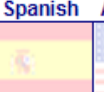

**And more specifically regarding your own economic situation, would you say that you are today ...?**

*Base : All Respondents*

						
<i>Unweighted Base</i>	1,034	1,074	1,111	997	949	1,000
<b>Very + Somewhat optimistic (4+5)</b>	<b>37%</b>	<b>48%</b>	<b>42%</b>	<b>38%</b>	<b>41%</b>	<b>54%</b>
Very optimistic (4)	3%	7%	4%	2%	4%	10%
Somewhat optimistic (3)	34%	42%	38%	37%	37%	44%
<b>Very + Somewhat pessimistic (1+2)</b>	<b>63%</b>	<b>52%</b>	<b>58%</b>	<b>62%</b>	<b>59%</b>	<b>46%</b>
Somewhat pessimistic (2)	50%	42%	45%	49%	40%	35%
Very pessimistic (1)	13%	10%	13%	12%	19%	11%
<b>Mean</b>	<b>2,3</b>	<b>2,5</b>	<b>2,3</b>	<b>2,3</b>	<b>2,3</b>	<b>2,5</b>

This situation has drastically changed in 2 years. At the end of 2006, the morale of the inhabitants of the 5 largest European countries as well as Americans was clearly positive.

Currently, **the trend has reversed** to a very strong worry.

						
<i>Very + Somewhat optimistic - december 2008</i>	37%	48%	42%	38%	41%	54%
<i>Very + Somewhat optimistic - december 2006</i>	72%	73%	66%	67%	85%	81%
<b>Différence</b>	<b>-35%</b>	<b>-25%</b>	<b>-24%</b>	<b>-29%</b>	<b>-44%</b>	<b>-27%</b>


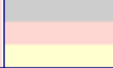


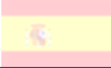

\* : less than 0,5%

People are more divided when asked about how 2008 was for them personally. Germans are more likely (35%) than those in the other 5 countries to positively evaluate their 2008 situation.

Americans are glum as 47% say 2008 has been a negative year.

**Regarding your personal situation, would you say that 2008 has been...**

*Base : All respondents*

						
<i>Unweighted Base</i>	1,034	1,074	1,111	997	949	1,000
<b>Positive (A very positive + A somewhat positive year)</b>	<b>25%</b>	<b>35%</b>	<b>27%</b>	<b>23%</b>	<b>25%</b>	<b>28%</b>
A very positive year (5)	5%	6%	6%	4%	5%	7%
A somewhat positive year (4)	21%	29%	21%	19%	20%	21%
A neither positive nor negative year (3)	36%	33%	34%	34%	37%	25%
<b>Negative (A very negative+ A somewhat negative year)</b>	<b>38%</b>	<b>31%</b>	<b>39%</b>	<b>43%</b>	<b>38%</b>	<b>47%</b>
A somewhat negative year (2)	23%	21%	26%	28%	26%	30%
A very negative year (1)	15%	10%	14%	15%	12%	17%
<b>Mean</b>	<b>2,8</b>	<b>3</b>	<b>2,8</b>	<b>2,7</b>	<b>2,8</b>	<b>2,7</b>

Americans are more negative than Europeans on the past year, but more optimistic for the coming years, as if the crisis was already behind them. Much of this can probably be attributed to the hope that a new presidency can bring.

\* : less than 0,5%


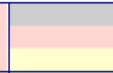

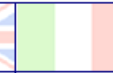
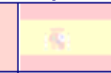

## THE MOST SIGNIFICANT EVENTS OF 2008

Two big events particularly held people's attention in 2008: the **current financial crisis** and the **election of Barack Obama** as president in the United-States.

The Olympics in China comes in 3<sup>rd</sup> in this ranking for Europeans when Americans are more focused on the evolution of the situation in Iraq.

### Which of the following do you feel have been the 3 most significant international events of 2008?

Base : All respondents


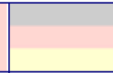

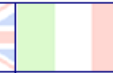
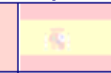

						
<i>Unweighted Base</i>	1,034	1,074	1,111	997	949	1,000
The stock exchange/banking/financial crisis	92%	84%	77%	85%	92%	87%
The election of Barack Obama in the United States	83%	82%	73%	82%	81%	80%
The Olympic Games in China	34%	38%	41%	33%	44%	25%
The conflict between China and Tibet	32%	26%	14%	31%	16%	7%
The conflict between Russia and Georgia	18%	21%	20%	19%	13%	24%
Evolution of the situation in Iraq	8%	10%	22%	12%	12%	35%
France as president of Europe	11%	2%	3%	2%	5%	3%
Other	5%	8%	6%	6%	10%	11%
Not sure	1%	4%	9%	2%	4%	4%

And when they are asked for the most significant event of the year, it is, for Europeans, the current financial crisis that comes in 1<sup>st</sup> place: an event that is far ahead of the other events for Spaniards (81%).

Americans are not surprisingly more divided between the current financial crisis and the historical election of their new President as the most significant event.

### And among these events, which one has been the most significant for you personally in 2008?

Base : Respondents for who there were significant international events in 2008

						
<i>Unweighted Base</i>	1,034	1,074	1,111	997	949	1,000
The stock exchange/banking/financial crisis	57%	49%	67%	58%	81%	49%
The election of Barack Obama in the United-States	30%	35%	17%	31%	12%	44%
The Olympic Games in China	4%	8%	10%	5%	5%	1%
The conflict between China and Tibet	6%	3%	2%	3%	1%	*
Evolution of the situation in Iraq	*	1%	3%	2%	1%	4%
The conflict between Russia and Georgia	2%	3%	1%	1%	1%	1%
France as president of Europe	1%	*	1%	0	*	*

According to Patrick VAN BLOEME, CEO for FRANCE at Harris Interactive, “these 2 events are linked: the financial crisis had a major role in the American campaign and Barack Obama's success. This election restored hope to Americans who are more optimistic than Europeans when faced with this crisis.”

\* : less than 0,5%





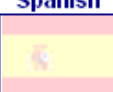
## THE IMPACT OF THE ELECTION OF BARACK OBAMA

In this climate of strong concern, the election of Barack Obama appears as a hope for people.

Europeans are very enthusiastic regarding the impact of this election for the United States. This feeling is particularly strong amongst French who were already strong supporters of Barack Obama before his election.

**In your opinion, what impact will the election of Barack Obama have for the United States?**

*Base : All Europeans*







					
<i>Unweighted Base</i>	1,034	1,074	1,111	997	949
<b>Very + Somewhat positive (4+5)</b>	<b>78%</b>	<b>71%</b>	<b>61%</b>	<b>70%</b>	<b>66%</b>
A very positive impact (5)	18%	18%	25%	24%	21%
A somewhat positive impact (4)	60%	53%	36%	46%	46%
An equally positive and negative impact(3)	9%	17%	18%	18%	16%
<b>Very + Somewhat negative (1+2)</b>	<b>3%</b>	<b>4%</b>	<b>5%</b>	<b>3%</b>	<b>4%</b>
A somewhat negative impact (2)	2%	3%	3%	2%	3%
A very negative impact (1)	1%	1%	2%	1%	1%
It would not have any impact	4%	2%	2%	4%	3%
Not sure	5%	6%	15%	6%	11%
<b>Mean</b>	<b>4,0</b>	<b>3,9</b>	<b>3,9</b>	<b>4,0</b>	<b>4,0</b>

This hope goes beyond the situation of the United States as over half of Spaniards and nearly half of French, Germans and Italians believe this election will have a positive impact on their own countries, as do a plurality of Britons.

However, while over half of Americans believe the election will have a positive impact on the US, 21% of Americans say it will have a negative impact.

**In your opinion, what impact will the election of Barack Obama have for your own country ?**

*Base : All Respondents*

						
<i>Unweighted Base</i>	1,034	1,074	1,111	997	949	1,000
<b>Very + Somewhat positive (4+5)</b>	<b>49%</b>	<b>48%</b>	<b>41%</b>	<b>46%</b>	<b>57%</b>	<b>53%</b>
A very positive impact (5)	5%	5%	7%	10%	10%	30%
A somewhat positive impact (4)	44%	43%	35%	37%	46%	23%
An equally positive and negative impact(3)	17%	28%	20%	20%	15%	12%
<b>Very + Somewhat negative (1+2)</b>	<b>4%</b>	<b>5%</b>	<b>7%</b>	<b>3%</b>	<b>4%</b>	<b>21%</b>
A somewhat negative impact (2)	3%	5%	5%	2%	4%	8%
A very negative impact (1)	1%	1%	1%	1%	1%	13%
It would not have any impact	21%	10%	9%	17%	12%	1%
Not sure	10%	9%	23%	14%	12%	13%
<b>Mean</b>	<b>3,7</b>	<b>3,6</b>	<b>3,6</b>	<b>3,8</b>	<b>3,8</b>	<b>3,6</b>

\* : less than 0,5%

## WHAT CHANGES FOR 2009?

If they had the ability to make changes in 2009, it seems that the French would change first their political leaders (an opinion less shared by Germans than for the others), then their head of state/government, and particularly for the French. Americans, who just elected their new President, are the least likely to wish to change it again.

After this, people want to change their physical appearance and their work, with a specific mention for Americans who are the ones who really wish to change their physical appearance.


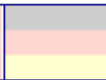

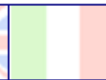
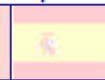

2 major material elements come next: changing one's house and one's car. These 2 markets, are both in trouble (both automotive and real-estate sales being in decline), but as this question asked if it was possible, economic realities may not make it so, meaning this doesn't translate to actions.

It is also interesting to note that it is in Germany, Italy and Great Britain where people wish the most changes in their country.

Finally, there are only very few expectations of changes on the human and social environment of people (neighbours, boss, colleagues, spouses, children, parents).

### If it was possible for you to change anything in 2009, which of these would you like to change?

Base : All Respondents

	French	German	British	Italian	Spanish	American
						
<i>Unweighted Base</i>	1,034	1,074	1,111	997	949	1,000
Your political leaders	32%	28%	38%	56%	39%	31%
Your head of state / government	44%	39%	32%	39%	34%	20%
Your physical appearance / look	29%	29%	37%	25%	30%	44%
Your job	28%	30%	30%	28%	25%	26%
Your car	29%	25%	23%	30%	26%	25%
Your house	32%	19%	31%	20%	28%	25%
Your age	20%	19%	24%	20%	17%	18%
The country you live in	10%	28%	24%	28%	6%	8%
Your neighbours	8%	13%	13%	14%	12%	11%
Your boss	12%	14%	12%	13%	9%	7%
Your co-workers	9%	8%	6%	10%	6%	7%
Your spouse	9%	6%	7%	5%	5%	6%
Your friends	5%	8%	6%	3%	2%	5%
Your parents	2%	5%	2%	4%	2%	4%
Your child/children	2%	6%	3%	1%	2%	2%
None of the above	13%	16%	10%	9%	15%	15%
Average number of change	2,82	2,93	2,97	3,05	2,58	2,54

\* : less than 0,5%

## THE BUDGET ALLOCATED FOR THE 2008 HOLIDAY SEASON







In this time of economic worries, Europeans as well as Americans have adapted their allocated budget for the 2008 holiday season.

61% of Americans think they will spend less than last year on their overall holiday budget.







Europeans will also follow this trend; especially among French, Italians and Spaniards.







**In comparison to last year, for the upcoming holiday season, will the budget you plan to allocate for each of the following categories be ...?**







*Base : All respondents*

	French	German	British	Italian	Spanish	American
<b>Your overall budget for the holidays</b>						
<i>Unweighted Base</i>	1,034	1,074	1,111	997	949	1,000
Higher	8%	12%	8%	7%	6%	5%
Similar	38%	42%	42%	32%	37%	28%
Lower	49%	34%	37%	54%	48%	61%
Does not apply	5%	12%	13%	7%	9%	6%

Presents, decorations and clothing will be the most impacted by these budget decreases. Globally, the budget allocated to food and drink is impacted the least.

	French	German	British	Italian	Spanish	American
<b>Will allocate a LOWER budget</b>						
<i>Unweighted Base</i>	1,034	1,074	1,111	997	949	1,000
Presents	44%	32%	39%	54%	43%	48%
Decorations	45%	33%	40%	47%	40%	44%
Clothing	40%	27%	41%	49%	42%	40%
Outings	36%	28%	39%	42%	40%	45%
Beauty/wellness (hairdresser, beauty care...)	34%	24%	35%	39%	37%	34%
Weekends and travel	32%	28%	34%	38%	33%	42%
Transports	28%	27%	26%	35%	33%	36%
Food and drink	30%	18%	26%	28%	35%	32%

	French	German	British	Italian	Spanish	American
<b>Will allocate a SIMILAR budget</b>						
<i>Unweighted Base</i>	1,034	1,074	1,111	997	949	1,000
Food and drink	56%	66%	59%	62%	54%	55%
Presents	40%	53%	47%	35%	44%	39%
Clothing	31%	57%	46%	37%	40%	45%
Beauty/wellness (hairdresser, beauty care...)	39%	55%	41%	42%	35%	40%
Transports	35%	48%	50%	44%	41%	36%
Outings	36%	50%	42%	42%	40%	35%
Weekends and travel	24%	45%	42%	31%	30%	33%
Decorations	30%	43%	36%	31%	25%	33%

	French	German	British	Italian	Spanish	American
<b>Will allocate a HIGHER budget</b>						
<i>Unweighted Base</i>	1,034	1,074	1,111	997	949	1,000
Food and drink	9%	12%	11%	7%	6%	7%
Weekends and travel	8%	15%	8%	9%	6%	5%
Presents	13%	10%	9%	7%	6%	6%
Outings	7%	14%	10%	9%	5%	5%
Clothing	4%	12%	6%	7%	7%	6%
Transports	9%	6%	12%	7%	6%	5%
Beauty/wellness (hairdresser, beauty care...)	5%	8%	4%	4%	4%	2%
Decorations	4%	6%	5%	4%	4%	3%

\* : less than 0,5%

**About Harris Interactive**

Harris Interactive is a global leader in custom market research. With a long and rich history in multimodal research, powered by our science and technology, we assist clients in achieving business results. Harris Interactive serves clients globally through our North American, European and Asian offices and a network of independent market research firms. For more information, please visit [www.harrisinteractive.com](http://www.harrisinteractive.com).

**Contact presse**Harris Interactive en France:

Laurence Lavernhe

5-7 rue du Sahel – 75012 Paris

Tel: 01 44 87 60 94 – Fax: 01 44 87 60 31

[llavernhe@harrisinteractive.fr](mailto:llavernhe@harrisinteractive.fr)

Harris Interactive Corporate Communications:

Office: +1 (585) 214-7479

[press@harrisinteractive.net](mailto:press@harrisinteractive.net)