



Flash Eurobarometer 349

INTRODUCTION OF THE EURO IN THE MORE RECENTLY ACCEDED MEMBER STATES

REPORT

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This survey has been requested by the European Commission, Directorate-General for Economic and Financial Affairs (DG ECFIN) and co-ordinated by Directorate-General for Communication.

This document does not represent the point of view of the European Commission.
The interpretations and opinions contained in it are solely those of the authors.

Flash Eurobarometer 349 - TNS Political & Social

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Introduction of the euro in the more recently acceded Member States

Conducted by TNS Political & Social at the request of
the European Commission,
Directorate-General Economic and Financial Affairs
(DG ECFIN)

Survey co-ordinated by Directorate-General Communication

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INTRODUCTION

All EU Member States are to adopt the common currency, the euro, once they have fulfilled the criteria defined in the Maastricht Treaty on the Functioning of the European Union (with the exception of Denmark and the UK which have a specific opt-out from these Treaty provisions). There is no common strategy or fixed timetable for the introduction of the euro in the Member States that joined in or after 2004, but the Treaty does require them to join the euro area at an undefined date in the future.

Of the countries that joined the EU in or after 2004, Slovenia, Cyprus and Malta joined the euro area in 2007 and 2008, Slovakia followed in January 2009 and Estonia in January 2011. Before adopting the euro, a country must comply with the Maastricht criteria including membership of the Exchange Rate Mechanism II (ERM II) for a minimum of two years. Lithuania and Latvia are members of ERM II, while Poland, the Czech Republic, Hungary, Bulgaria and Romania have not yet joined it.

The European Commission keeps track of general opinions, levels of knowledge and familiarity with the single currency among citizens of the respective countries in view of the introduction of the euro in the Member States that joined the EU in 2004 or later. This survey is the fourteenth of its kind, following earlier Flash Eurobarometer surveys in the period 2004–2012.

The objectives of this survey are identical to those of previous rounds: to identify and track citizens' perceptions in the seven Member States that joined the European Union in the recent years and have not yet adopted the euro (the "NMS7") regarding the future introduction of the common currency.

The main themes of this report are an examination of:

- levels of knowledge about and experience of the euro among citizens in the NMS7
- citizens' feelings about how well they have been informed and their preferred information channels
- NMS7 citizens' perceptions of, and support for, the single currency
- their expectations about the adoption of the euro and the potential inconveniences they foresee.

This report sums up the main attitudes towards the euro in the NMS7 and describes the climate of opinion in each of the countries which are due to adopt the common currency at a future date. It should be noted that "average" perceptions might change because of the different composition of samples in comparison to previous rounds:

Slovenia was dropped from the surveys in 2007, Malta and Cyprus in 2008 and Slovakia in 2009. Estonia was excluded as of May 2011. In addition, Bulgaria and Romania joined the surveys from autumn 2007. In the current round, the NMS7 average includes Bulgaria, the Czech Republic, Hungary, Latvia, Lithuania, Poland and Romania.

The Eurobarometer web site can be consulted at the following address:

http://ec.europa.eu/public_opinion/index_en.htm

*We would like to take the opportunity to thank all the respondents across the continent
who have given of their time to take part in this survey.*

Without their active participation, this study would simply not have been possible.

This survey was carried out by TNS Opinion & Social network in the new seven Member States that joined the European Union in the recent years and have not yet adopted the euro (the "NMS7") between 19 April and 21 April 2012. Some 7011 respondents from different social and demographic groups were interviewed face-to-face at home in their mother tongue on behalf of Directorate-General Economic and Financial Affairs (DG ECFIN). The methodology used is that of Eurobarometer surveys as carried out by the Directorate-General for Communication ("Research and Speechwriting" Unit)¹. A technical note on the manner in which interviews were conducted by the Institutes within the TNS Opinion & Social network is appended as an annex to this report. Also included are the interview methods and confidence intervals².

Note

ABBREVIATIONS

	The seven Member States that joined the European Union
NMS7	in the recent years and have not yet adopted the euro (2004 and 2007)
BG	Bulgaria
CZ	Czech Republic
LV	Latvia
LT	Lithuania
HU	Hungary
PL	Poland
RO	Romania

¹ http://ec.europa.eu/public_opinion/index_en.htm

² The results tables are included in the annex. It should be noted that the total of the percentages in the tables of this report may exceed 100% when the respondent has the possibility of giving several answers to the question.

MAIN FINDINGS

Awareness of – and experience with – the euro

- When asked about the number of Member States already in the euro area, nearly three out of 10 (29%) respondents know the correct answer: 17 countries. This figure represents a marginal increase since November 2011, though it remains below the level recorded in September 2010 (32%). The proportion of respondents able to state the correct number of euro zone countries ranges from 36% in the Czech Republic to 25% in Romania.
- Over four out of 10 (44%) NMS7 respondents anticipate their country joining the euro by 2016 at the latest. This is down significantly on the 54% of respondents who thought this in November 2011 and on the 57% who said this in May 2011.
- The proportion of respondents who thought their country would join the euro area by 2016 at the latest ranges from 70% in Latvia and 54% in Bulgaria and Lithuania, to 27% in the Czech Republic and 29% in Hungary. The proportion of respondents who think their country will join by 2014 has also fallen in all seven countries.
- Seven out of 10 (71%) respondents believe that their nation has a choice as to whether it can adopt the euro, even though the Accession Treaty obliges all new Member States to join the euro area – more than said this in November 2011. A quarter (25%) of respondents correctly answer that their country has no choice in this regard; at the individual country level this figure ranges from 41% in Hungary to 21% in Poland and the Czech Republic.
- As in other rounds of the survey, in most NMS7 countries citizens are more familiar with euro banknotes than euro coins:
 - While 51% of interviewees know that euro banknotes have the same design in all euro area countries, only 35% correctly say that euro coins have partly different designs from country to country.
 - 89% of respondents have seen euro banknotes and 84% have seen euro coins; 66% have already used the banknotes and 58% have used euro coins
- Half (50%) of the respondents say they have only used euro banknotes abroad, up from the 47% who said this in November 2011. 19% have only used euro banknotes *in their home country* and 31% had used them *both at home and abroad*.

Informing citizens about the euro

- A majority (59%) of citizens in the NMS7 do not feel well informed about the euro: 46% say they are *not very well informed* and 13% *do not feel well informed at all*. Focusing on respondents who feel informed about the euro, 34% answer that they feel *rather well informed* and 5% say they are *very well informed*.
- The Czech Republic is the only NMS7 country in which more respondents feel well informed about the euro than the contrary: 53% say they are well informed, while 44% say they are not. But in the other six NMS7 countries, a majority of respondents say they are not well informed.
- Among respondents who do not feel well informed about the euro, a majority would like to receive information about the introduction of the euro well in advance of the changeover. Over a quarter (27%, -1 point compared with November 2011) would like to be informed as soon as possible. Over a third (34%, -1 point) would like to be informed a few years before. Over a quarter (29%, +2 points) would like to know a few months before. Just a small minority (6%, no change) would like to be informed a few weeks before.
- The proportion of respondents who would like to be informed as soon as possible ranges from 32% in Poland to 14% in Hungary. Those saying they would like to be informed a few years before range from 42% in Lithuania to 28% in Hungary. Respondents in Hungary (41%) are the most likely to say that they would like to be informed a few months before, while those in Lithuania (23%) are the least likely to say this.
- More than three-quarters (76%) of respondents say they would trust information regarding the euro and issues related to the changeover provided by their national central bank. Nearly six respondents out of ten (58%) say the same about information from the European institutions.
- Less than half of respondents would trust information about the euro changeover from governments, national or regional authorities (43%), tax and fiscal administrations (43%), consumer associations (42%), commercial banks (39%), trade unions (30%), and journalists (29%).
- Television is the preferred channel for information about the introduction of the euro (selected by 70%, -3 points). It is followed by the internet (56%, -2 points), banks (48%, -4 points), the radio (47%, -3 points), and newspapers and magazines (44%, -5 points).
- In terms of which campaign activities and tools are essential in preparation for the changeover, knowing the value of one euro in their country's currency is

considered the most important campaign tool (by 75% of respondents), followed by the practical implications of the euro regarding the salary and personal bank account (74%) and the way the euro will be introduced should be included (72%).

The euro: perceptions and support for its introduction

- More respondents in the NMS7 think that the euro will have *negative* consequences for their country (54%) than positive (39%). Respondents' expectations have generally become slightly more positive than in November 2011. Then, 55% thought the consequences would be negative. This marks the end of a long-running trend of decline in the proportion of respondents who said the consequences of joining the euro would be positive.
- Romania is the only NMS7 country in which a higher proportion of respondents think the introduction of the euro would have positive consequences for their country, by 49% to 44%. People in the Czech Republic are the most likely to think that introduction of the euro would have negative consequences: 77% say this, with only 18% saying it would be positive.
- A majority (51%) of NMS7 citizens think the personal consequences of introducing the euro will be negative, while 40% think they will be positive. These results are very much in line with those obtained in November 2011.
- Romania (54%), Latvia (45%) and Hungary (44%) are the only countries where a higher proportion of respondents think the introduction of the euro will have positive consequences for them personally. People in the Czech Republic are the most likely to think that the introduction of the euro would have negative consequences for them personally: 72% say this, with only 21% saying they would be positive.
- A relative majority (49% vs. 47%) of NMS7 respondents are against joining the euro, a shift from the equal numbers (48%) that were for and against in November 2011.
- A majority of respondents are in favour of introducing the euro in three countries: Romania (64%), Hungary (58%) and Bulgaria (53%). Opposition is highest in the Czech Republic, where 81% are against joining the euro.
- The proportion of respondents (44%) who would like the euro to be introduced as late as possible has fallen for the first time in several waves of the survey. Roughly one-third (35%) of interviewees want the changeover to happen *after a certain time*, while 17% want to join *as soon as possible*.

Consequences of adopting the euro

- Over 4 in 10 (46%) respondents believe that the changeover to the euro has had *very* or *rather positive* consequences in the countries that are already using it, while 42% think the euro's impact has been *very* or *rather negative*. This marks an important turnaround on the November 2011 results, when a relative majority believed that the euro had had negative consequences.
- A relative majority of respondents in four countries and an outstanding majority in two of them think that the euro has had positive consequences in those countries that are already using it, the only exception being the Czech Republic.
- Seven out of ten (71%) respondents think the changeover to the euro will increase prices, while only 20% think it will help keep prices stable.
- A majority of respondents in all seven countries think that introducing the euro will increase prices, ranging from the 81% who think so in Poland to the 54% who think so in Romania.
- When asked about the political and economic consequences of joining the euro, 48% of respondents think that introducing the euro will make them feel more European than they do now. 44% think that joining the euro will reinforce the place of Europe in the world.
- When asked about the practical consequences of joining the euro, over four fifths (81%) think that it will be more convenient for those who travel in other countries that use the euro, and two thirds (66%) say that joining will make it easier to shop in other countries that use the euro. Six out of 10 respondents say that joining the euro will allow people to easily compare prices with other countries that use the euro (60%), and that it will save money by eliminating currency exchange charges in other countries that use the euro (59%). Only 26% of respondents think that introducing the euro will protect their country from the effects of international crises.
- In all seven countries, most respondents say that joining the euro will make it more convenient for those who travel in other countries that use the euro, ranging from 88% in the Czech Republic to 71% who think so in Hungary.
- A majority (74%) of respondents agree that they are concerned about abusive price setting during the changeover (-1 point compared with November 2011). The proportion of respondents expressing concern about abusive price setting ranges from 83% in Latvia to 64% in Hungary.

- Under half (46%, +1 point) of respondents feel that replacing their national currency will cause them a lot of inconvenience. The proportion of respondents who think this range from 55% in the Czech Republic to 42% in Romania.
- Just under half (47%, -1 point) of all respondents feel that adopting the euro will mean that their country will lose a part of its identity. The proportion of respondents expressing this view ranges from 68% in Latvia to 38% in Hungary.
- Just over four in ten (43%, no change) feel that adopting the euro will mean that their country will lose control over its economic policy. The proportion of respondents who think this ranges from 57% in Latvia to 36% in Hungary.

I. AWARENESS OF THE EURO

1. CITIZENS' AWARENESS OF THE EURO AREA AND THE EURO'S INTRODUCTION

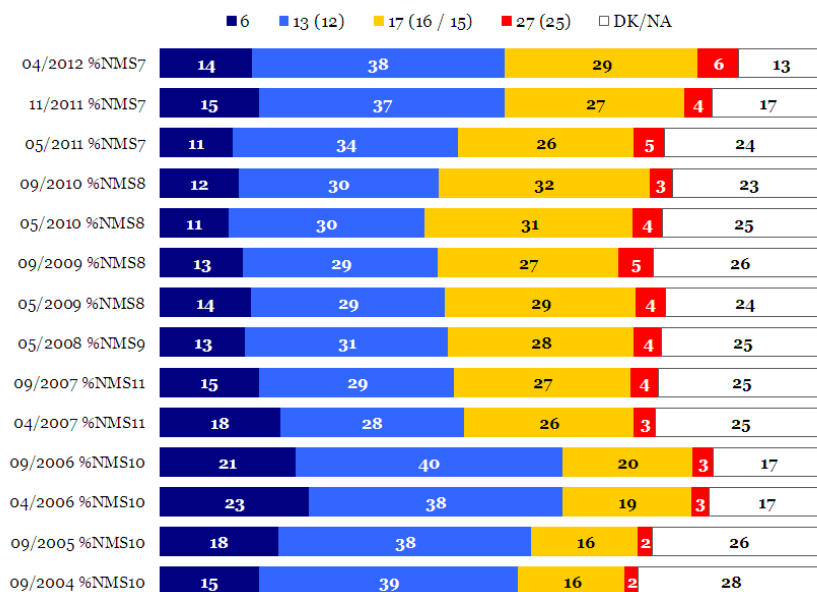
1.1. Awareness of the current number of euro area countries

- Three out of 10 of respondents correctly think that there are 17 euro-area countries –

When asked how many EU countries have already introduced the euro, nearly three out of 10 (29%) of all NMS7 respondents say correctly that 17 have done so³. This is an increase on the 27% who gave this response in the previous two waves of the survey (in November and May 2011), although still lower than the proportion of correct answers given in September 2010 (32%) and in May 2010 (31%)⁴.

A majority of respondents give an incorrect answer: 38% say there are 13 euro countries (up marginally from 37% in November 2011), 14% think there are six (down from 15%), and 6% think there are 27 (up from 4%). There has been a decline in the proportion of respondents answering 'don't know': 13% say this now, compared with 17% in November 2011 and 24% in the May 2011 survey.

Number of current euro area countries

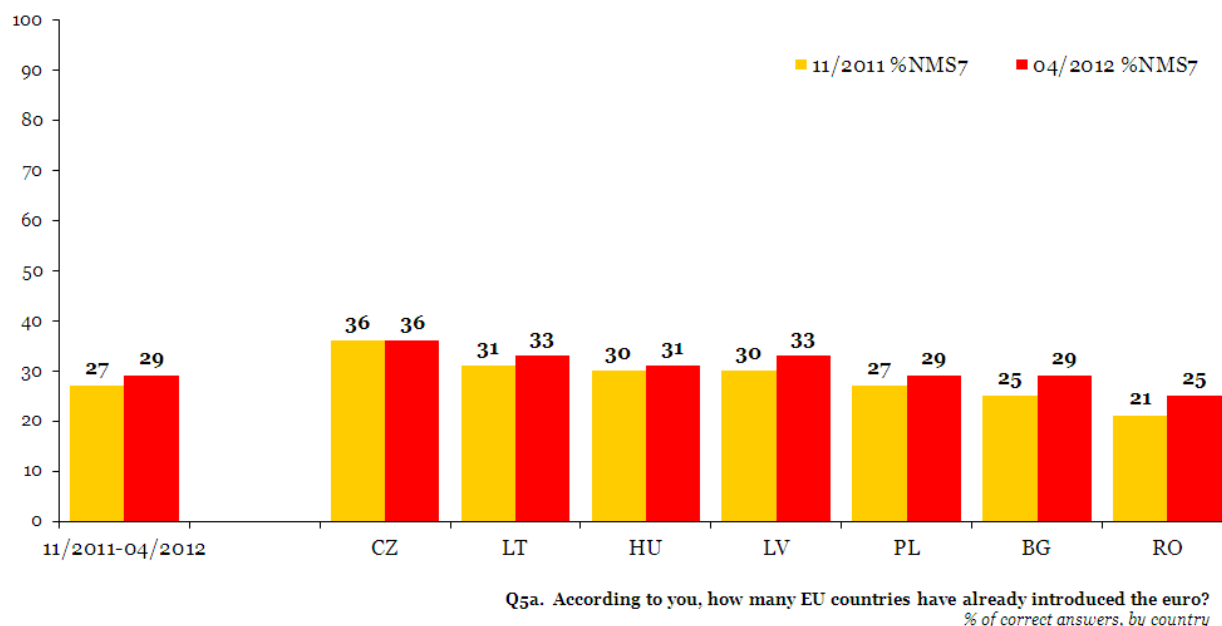


Q5a. According to you, how many EU countries have already introduced the euro?
(figures in parentheses were asked in previous surveys)

³ Q5a: According to you, how many EU countries have already introduced the euro? 27; 17; 13; 6; don't know.

The proportion of respondents able to state the correct number of euro area countries ranges from 36% in the Czech Republic to 25% in Romania. The proportion of people giving this answer rose in six NMS7 countries: Bulgaria (+4 points), Romania (+4 points), Latvia (+3 points), Lithuania (+2 points), Poland (+2 points) and Hungary (+1 point). It held steady in the Czech Republic, and fell in none of the seven countries covered by the survey (in contrast with the previous wave, when falls were registered in three NMS7 countries).

Number of current euro area countries (% correct answers: "17" in 11/2011 and 04/2012)







The socio-demographic data shows that:

- Men are more likely than women to say that 17 EU countries have already introduced the euro, by a margin of 37% to 22%.
- While 33% of respondents aged 55 and over rightly say that 17 Member States have introduced the euro, only 26-29% of people in the three younger age groups say the same.
- Respondents who spent longer in education are slightly more likely to say there are 17 countries in the euro area.

⁴ In the two 2010 surveys, eight Member States were included in the survey, and at that time 16 countries had joined the euro.

- While a third of respondents (33%) who live in large towns say that 17 Member States have introduced the euro, only 26% of those who live in rural villages say the same.
- 36% of respondents who consider themselves to be well-informed about the euro correctly say that 17 Member States are in the euro area, as opposed to 26% who describe themselves as not well-informed.

Q5a According to you, how many EU countries have already introduced the euro?

	6	13	17	27	DK/NA	Total 'Wrong answers'
NMS7	14%	38%	29%	6%	13%	58%
 Sex						
Male	9%	37%	37%	7%	10%	53%
Female	18%	39%	22%	5%	16%	62%
 Age						
15-24	15%	40%	29%	9%	7%	64%
25-39	14%	41%	26%	6%	13%	61%
40-54	14%	39%	29%	5%	13%	58%
55 +	13%	34%	33%	4%	16%	51%
 Education (End of)						
15-	13%	31%	28%	7%	21%	51%
16-19	15%	38%	27%	6%	14%	59%
20+	13%	39%	31%	5%	12%	57%
Still studying	14%	40%	32%	9%	5%	63%
 Subjective urbanisation						
Rural village	16%	38%	26%	7%	13%	61%
Small/ Mid-size town	14%	39%	29%	5%	13%	58%
Large town	12%	37%	33%	5%	13%	54%
Level of information about the euro						
Total 'Informed'	12%	38%	36%	5%	9%	55%
Total 'Not informed'	15%	38%	26%	6%	15%	59%

1.2. Expected date of the euro's adoption

- For the first time, less than half of the people in the NMS7 think their country will have joined the euro by 2016 –

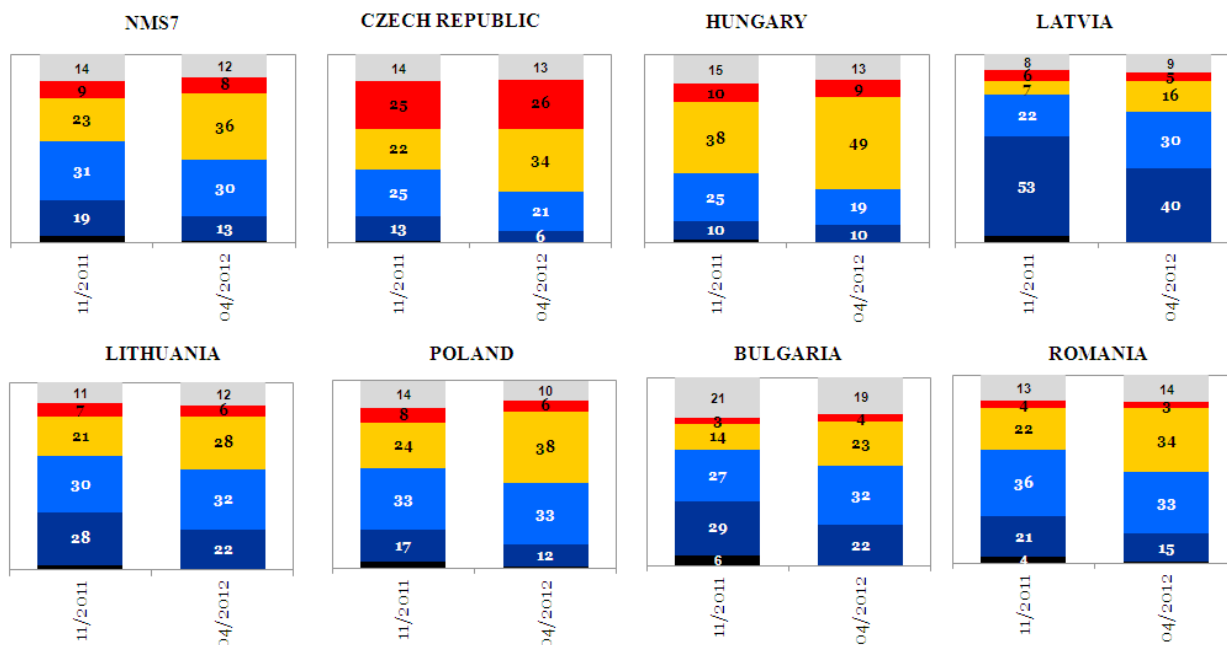
Over four out of 10 (44%) of all NMS7 respondents expect their country to adopt the euro by 2016⁵. This is down significantly on the 54% of respondents who thought this in November 2011 and on the 57% who said this in May 2011. Nearly a third (30%, -1 point) think their country will adopt the euro in 2015-16, while 13% (-6 points) think this will happen in 2013-14, and 1% (-3 points) anticipate it in 2012⁶.

Over a third (36%) think their country will join the euro in 2017 or later – a large increase on the 23% that said this in November 2011. However, the proportion of respondents who think their country will never join the euro has fallen slightly, from 9% to 8%. A further 12% (-2 points) say they don't know when their country will adopt the euro.

Expected date of the euro's adoption

■ 2011-2012 ■ 2013-2014 ■ 2015-2016 ■ 2017 or later ■ Never ■ DK/NA

Q5c. When, in which year do you think the euro will be introduced in [COUNTRY]?
% by country



⁵ Q5c: When, in which year do you think the euro will be introduced in [COUNTRY]? 2011-12, 2013-14, 2015-16, 2017 or later; never; don't know.

⁶ In previous waves respondents were asked whether they anticipated entry to the euro in 2011-12.

The proportion of respondents who think their country will join the euro by 2016 ranges from 70% in Latvia and 54% in Bulgaria and Lithuania, to 29% in Hungary and 27% in the Czech Republic. The proportion saying accession will occur in 2017 or later is highest in Hungary (49%) and lowest in Latvia (16%). And the proportion saying their country will never introduce the euro is highest in the Czech Republic (26%) and lowest in Bulgaria (4%) and Romania (3%).

Looking at the changes that have occurred since November 2011, the proportion of respondents who think their country will adopt the euro by 2016 has fallen in the seven Member States: Romania (49%, -12 points), the Czech Republic (27%, -12 points), Latvia (70%, -9 points), Bulgaria (54%, -8 points), Poland (46%, -8 points), Hungary (29%, -8 points), and Lithuania (54%, -7 points).

Only a tiny minority of respondents in all seven Member States now think their country will join the euro in 2012. The proportion of respondents who think their country will join by 2014 has also fallen in all seven countries: Latvia (40%, -17 points), Bulgaria (22%, -13 points), Romania (16%, -9 points), Lithuania (22%, -9 points), Poland (13%, -8 points), the Czech Republic (6%, -8 points) and Hungary (10%, -2 points).

By contrast, the number of people who think their country will adopt the euro in 2017 or later has increased substantially in all seven countries: Poland (38%, +14 points), Romania (34%, +12 points), the Czech Republic (34%, +12 points), Hungary (49%, +11 points), Latvia (16%, +9 points), Bulgaria (23%, +9 points), and Lithuania (28%, +7 points).

The proportion of respondents who say their country will never join the euro increased slightly in two countries, Bulgaria (4%, +1 points) and the Czech Republic (26%, +1 point), while falling slightly in the other five: Poland (6%, -2 points), Hungary (9%, -1 point), Lithuania (6%, -1 point), Romania (3%, -1 point) and Latvia (5%, -1 point).

The socio-demographic results show that:

- Women are more inclined to think their country will introduce the euro by 2014 or by 2016, while men are more likely to say their country will join in 2017 or later.
- Individuals who left education at a younger age are more likely to think their country will join the euro by 2014, while those who left later are more likely to think their country will join after 2015 or never.
- Manual workers are the most likely to envisage entry to the euro by 2014, while employees are the most inclined to expect it in 2015-16. Self-employed respondents are the most likely to say that their country will adopt the euro in 2017 or later, or never.

- Individuals who have not already seen euro banknotes or coins are more likely to expect accession to happen by 2014, while those who have already seen them are more likely to say it will happen after 2015, or never.
- People who say they are well-informed about the euro are more likely to say that their country will join in 2015 or later. Those who consider themselves to be uninformed are more likely to think accession will happen by 2014.
- Respondents who say the euro is having positive consequences in the countries that already use it are more likely to think their country will join at some stage, while those who think the euro is having negative consequences are more inclined to say they country will never become part of the single currency.

Q5c When, in which year do you think the euro will be introduced in [OUR COUNTRY]?

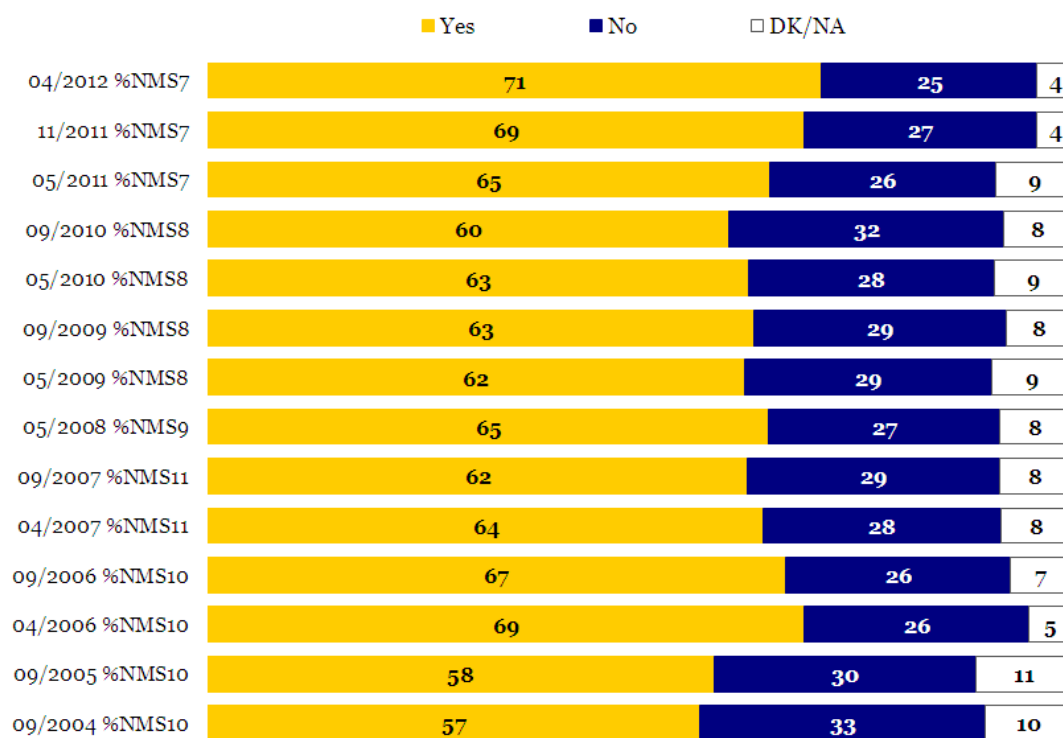
	2011-2012	2013-2014	2015-2016	2017 or later	Never	Don't know/ No answer
NMS7	1%	13%	30%	36%	8%	12%
Sex						
Male	-	11%	29%	41%	8%	11%
Female	1%	16%	31%	31%	7%	14%
Education (End of)						
15-	3%	20%	26%	27%	4%	20%
16-19	-	15%	29%	35%	8%	13%
20+	-	11%	30%	38%	8%	13%
Still studying	2%	13%	31%	39%	8%	7%
Respondent occupation scale						
Self-employed	-	10%	28%	39%	11%	12%
Employee	-	10%	32%	37%	8%	13%
Manual workers	1%	17%	25%	38%	8%	11%
Not working	1%	15%	30%	34%	7%	13%
Already seen euro banknotes						
Yes	1%	12%	30%	37%	8%	12%
No	2%	22%	25%	28%	6%	17%
Already seen euro coins						
Yes	-	12%	30%	38%	8%	12%
No	1%	21%	28%	26%	7%	17%
Level of information about the euro						
Total 'Informed'	-	11%	29%	39%	9%	12%
Total 'Not informed'	1%	15%	30%	34%	7%	13%
Consequences in countries already using it						
Total 'Positive'	1%	15%	34%	38%	3%	9%
Total 'Negative'	1%	12%	27%	34%	13%	13%

1.3. Can new Member States choose whether or not to adopt the euro?

- Only a quarter of all respondents are aware that their country is obliged to introduce the euro under the terms of EU membership -

Over seven out of 10 (71%) of all NMS7 respondents say that their country can choose whether to adopt the euro⁷. This marks an increase on the 69% who said this in November 2011, and is the highest proportion of respondents ever to have given this answer in the history of the survey. Just a quarter (25%) say, correctly, that their country cannot choose.

Can Member States choose whether or not to adopt the euro?



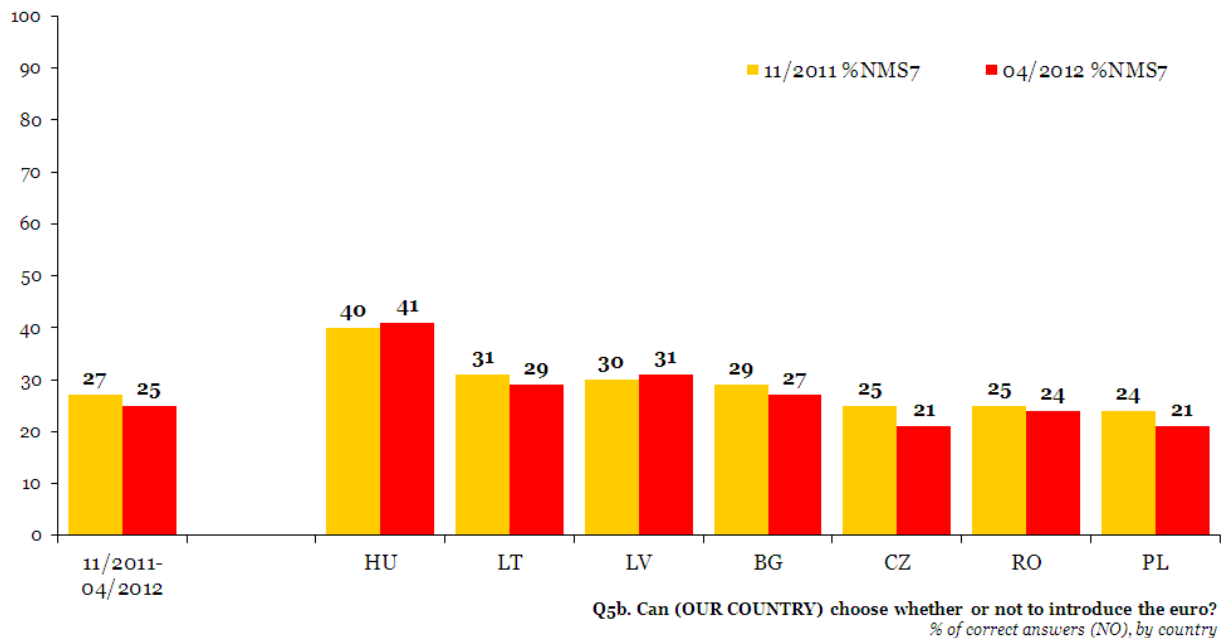
Q5b. Can [COUNTRY] choose whether or not to introduce the euro?

Awareness that EU Member States are obliged to join the euro is highest in Hungary, where 41% say their country cannot choose. It is lowest in Poland (21%) and the Czech Republic (21%).

⁷ Q5b: Can [COUNTRY] choose whether or not to introduce the euro? Yes; no; don't know.

Compared with November 2011, only Hungary (41%, +1 point) and Latvia (31%, +1 point) have seen slight increases in the number of people saying that their country cannot choose whether to introduce the euro. In the other five countries, fewer people say their country cannot choose than did so in the previous wave of the survey: the Czech Republic (21%, -4 points), Poland (21%, -3 points), Bulgaria (27%, -2 points), Lithuania (29%, -2 points), and Romania (24%, -1 point).

Can Member States choose whether or not to adopt the euro? % of correct („NO”) answers





Socio-demographic analysis reveals that:

- There is no gender variation on this question.
- Younger respondents are more likely to think that their country can choose whether or not to join the euro.
- People who consider themselves to be informed about the euro are – contrary to what one might expect – somewhat more likely to say that their country can choose to join the euro: 74% say this, compared with 69% of people who do not consider themselves to be informed.
- Respondents who say that the consequences of the euro in countries already using it are positive are more likely to say their country has a choice about whether to join, whereas those who say the consequences have been negative are more likely to say their country does not have a choice. This pattern recurs when people are asked about the expected consequences of the euro for their own country and also about the expected personal consequences.

- Those in favour of joining the euro are more likely to say their country can choose whether to join, while those who are against are more likely to say their country does not have a choice.

Q5b In your opinion, can (OUR COUNTRY) choose whether or not to introduce the euro?

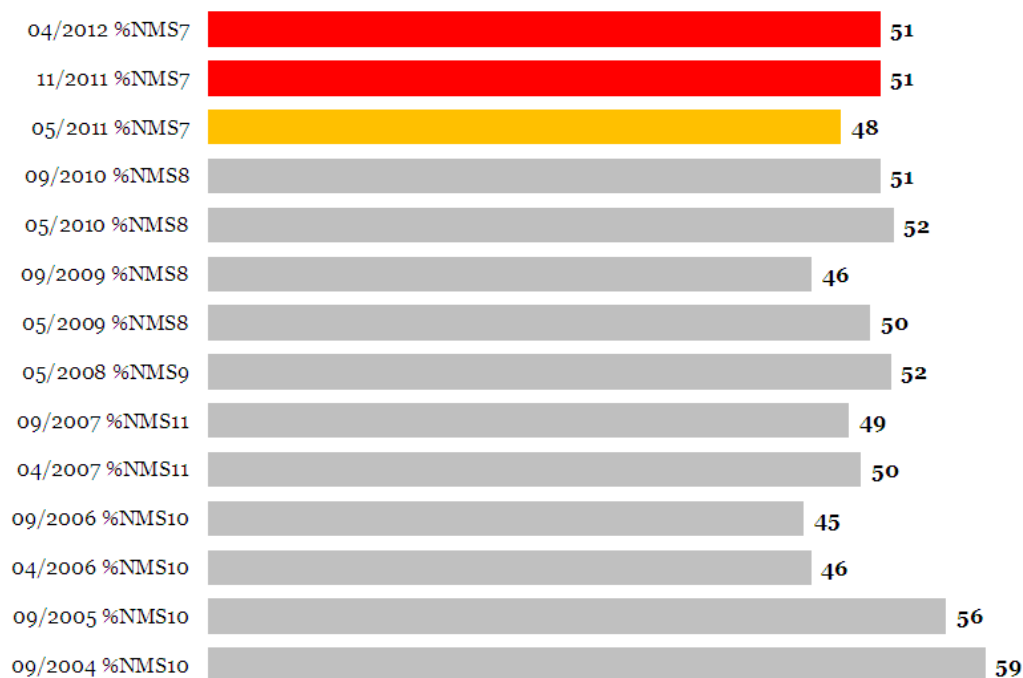
	Yes	No	DK/NA
NMS7	71%	25%	4%
 Sex			
Male	71%	25%	4%
Female	71%	25%	4%
 Age			
15-24	77%	22%	1%
25-39	72%	25%	3%
40-54	69%	25%	6%
55 +	67%	27%	6%
Level of information about the euro			
Total 'Informed'	74%	23%	3%
Total 'Not informed'	69%	26%	5%
Consequences in countries already using it			
Total 'Positive'	75%	22%	3%
Total 'Negative'	67%	28%	5%
Expected consequences of the euro for own country			
Total 'Positive'	77%	20%	3%
Total 'Negative'	67%	29%	4%
Expected personal consequences of the euro			
Total 'Positive'	76%	21%	3%
Total 'Negative'	67%	29%	4%
Attitude towards the introduction of the euro in the country			
Total 'In favour'	75%	21%	4%
Total 'Against'	67%	29%	4%

1.4. Familiarity with the design of euro banknotes

- Half of all respondents are aware that euro banknotes look the same in all countries that use the currency –

A majority (51%) of all NMS7 respondents think that euro banknotes look exactly the same in all countries that use the euro⁸. This marks no change on the result obtained in November 2011. Just under a third (31%) think the banknotes have partly different designs from country to country, while 18% don't know whether the designs vary.

Familiarity with the design of euro banknotes: the euro banknotes look exactly the same in all countries that use the euro



2006-2012: Q3. And what do you think, which of the following statements is correct?
The euro banknotes look exactly the same in all countries/have partly different designs from country to country/that use the euro

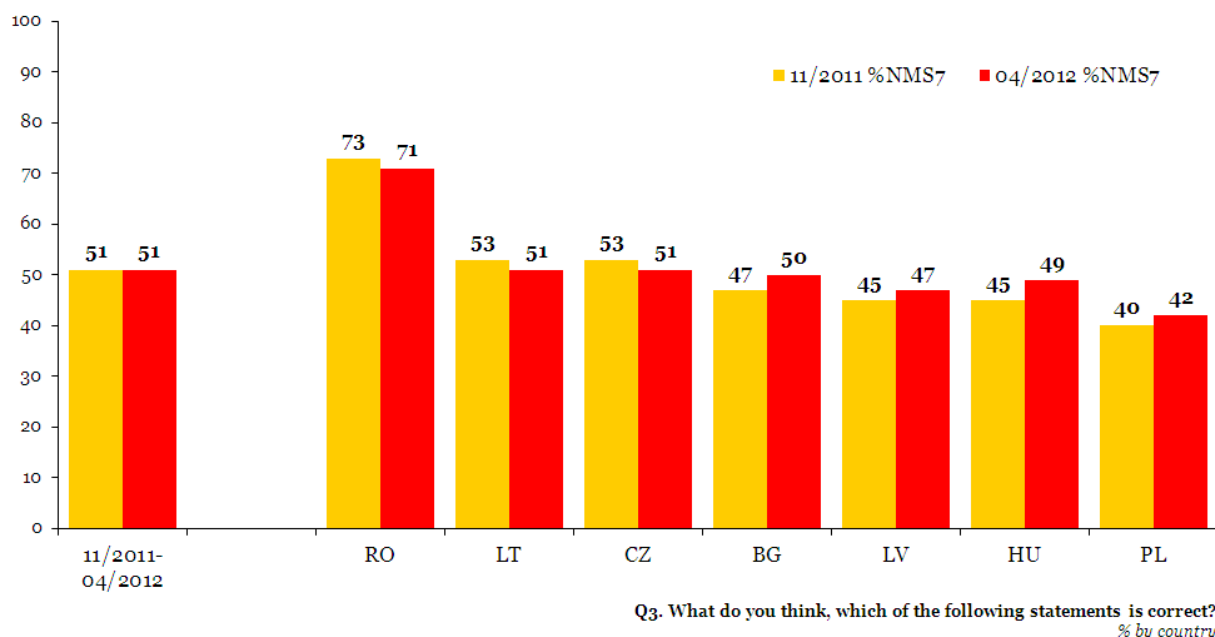
2004-2005: Q15. According to you, do the euro banknotes look the same in all countries of the euro area?
Yes/No/DK/NA

A majority of respondents in Romania (71%), Lithuania (51%), the Czech Republic (51%) and Bulgaria (50%) are aware that euro banknotes look the same throughout the euro zone. However, fewer than half know this in Hungary (49%), Latvia (47%), and Poland (42%).

⁸ Q3: And what do you think, which of the following statements is correct? The euro banknotes look exactly the same in all countries that use the euro/have partly different designs from country to country.

Compared with November 2011, awareness that euro banknotes look the same in all Member States increased slightly in four countries: Hungary (+4 points), Bulgaria (+3 points), Poland (+2 points), and Latvia (+2 points). Awareness fell marginally in Romania (-2 points), Lithuania (-2 points) and the Czech Republic (-2 points).




**Familiarity with the design of euro:
euro banknotes look exactly the same in all countries of the euro area**



The socio-demographic data show that:

- Women are slightly more likely than men to be aware that euro banknotes look the same in all countries, by a margin of 53% to 50%.
- Younger respondents are much more likely to be aware that euro banknotes look the same in all countries: 60% of 15-24 year-olds know this, compared with just 44% of people aged over 55.
- While 53-54% of employees, manual workers and self-employed people are aware that euro banknotes look the same in all countries, only 49% of people who are not working say this.
- A majority (52%) of people who have seen euro banknotes are aware that they look the same in all countries, as opposed to 43% of those who have not seen them before.

Q3 What do you think, which of the following statements is correct?

	The euro banknotes look exactly the same in all countries that use the euro	The euro banknotes have partly different designs from country to country	DK/NA
NMS7	51%	31%	18%
 Sex			
Male	50%	37%	13%
Female	53%	26%	21%
 Age			
15-24	60%	36%	4%
25-39	55%	33%	12%
40-54	52%	30%	18%
55 +	44%	27%	29%
 Respondent occupation scale			
Self-employed	53%	34%	13%
Employee	54%	34%	12%
Manual workers	54%	30%	16%
Not working	49%	30%	21%
Already seen euro banknotes			
Yes	52%	31%	17%
No	43%	30%	27%

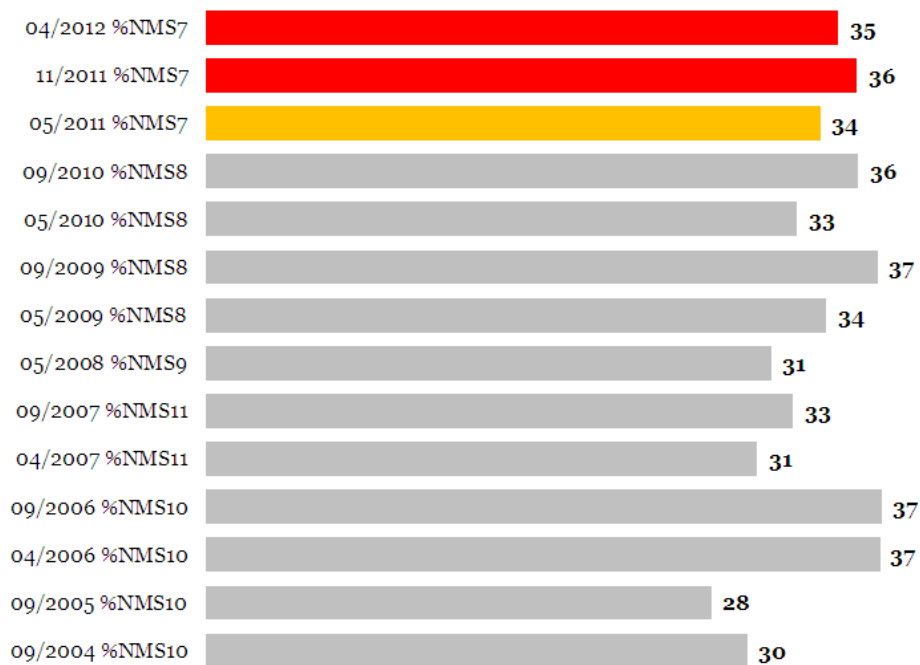
1.5. Familiarity with the design of euro coins

- Respondents continue to be less familiar with euro coins than they are with euro banknotes –

As shown consistently by previous surveys, respondents tend to be less familiar with euro coins than with euro banknotes⁹. Just over a third (35%) of NMS7 respondents correctly say that euro coins have partly different designs from country to country, compared with 51% who correctly say that euro banknotes look exactly the same. However, this is a slight drop on the 36% who said this in November 2011, though still up slightly on the May 2011 level of 34%.

By contrast, almost half (47%) of NMS7 respondents think that euro coins look exactly the same in all countries that use the euro (up from 46% who said this in November 2011, and 41% who said this in May 2011). Just under a fifth (18%) say they don't know (no change on the November 2011 result, and well below the 25% who said this in May 2011).

Familiarity with the design of euro coins: the euro coins have partly different designs from country to country



2006-2012: Q4. And what do you think, which of the following statements is correct?
The euro coins look exactly the same in all countries- / have partly different designs from country to country/ that use the euro

2004-2005: Q16. According to you, do the euro coins look the same in all countries of the euro area?
Yes/No/DK/NA

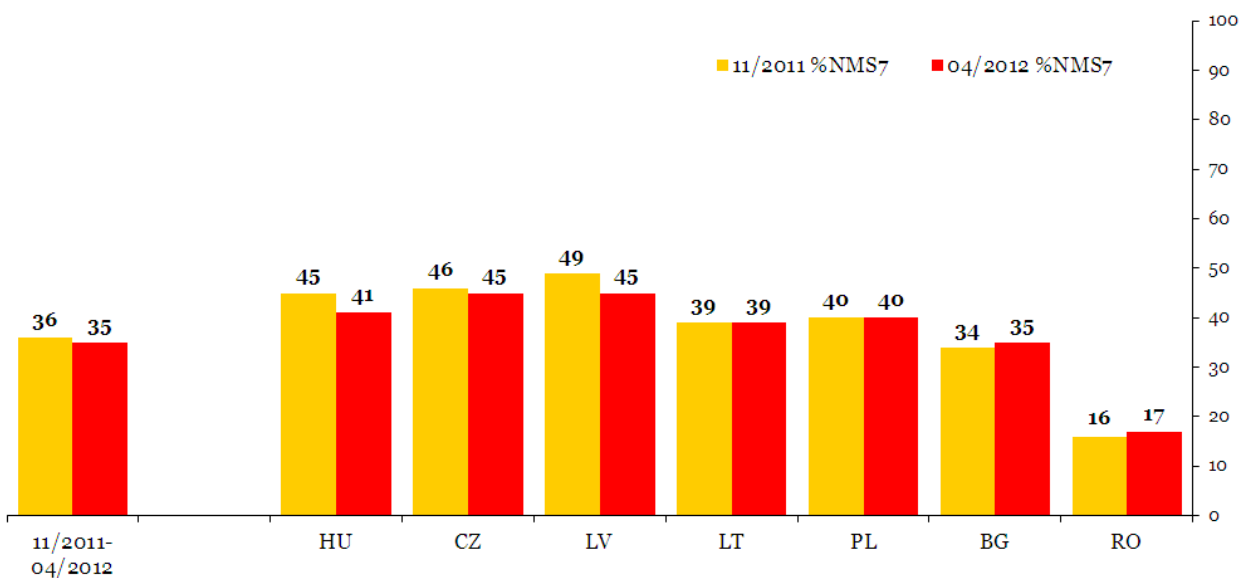
⁹ Q4: And what do you think, which of the following statements is correct? The euro coins look exactly the same in all countries that use the euro/have partly different designs from country to country.

The following chart provides a comparison of familiarity of the design of euro banknotes and coins. While awareness that banknotes all look the same irrespective of the country concerned has stayed at around the 50% mark for several waves of the survey, it is noticeable that the (incorrect) belief that coins also all look the same has been creeping up towards the 50% mark over the last few waves. It is also noticeable that awareness that the design of coins differs partially from country to country is only marginally higher than the (incorrect) belief that the design of banknotes also differs partially.

Awareness that euro coins differ in design from country to country ranges from 45% in Latvia and the Czech Republic, down to 17% in Romania, where familiarity with euro coins is lowest by a considerable margin (as in previous surveys). As the graph below shows, this result makes Romania an exception. In the other six NMS7 countries, awareness of euro banknotes and coins is quite similar, but in Romania familiarity with euro banknotes is far higher than it is for coins.

Since November 2011, awareness that euro coins have varying designs has risen slightly in Bulgaria (35%, +1 point) and Romania (17%, +1 point), while remaining the same in Poland (40%) and Lithuania (39%). Meanwhile, awareness fell in the remaining three countries: Latvia (45%, -4 points), Hungary (41%, -4 points), and the Czech Republic (45%, -1 point).

**Familiarity with the design of euro:
the euro coins have partly different designs from country to country**

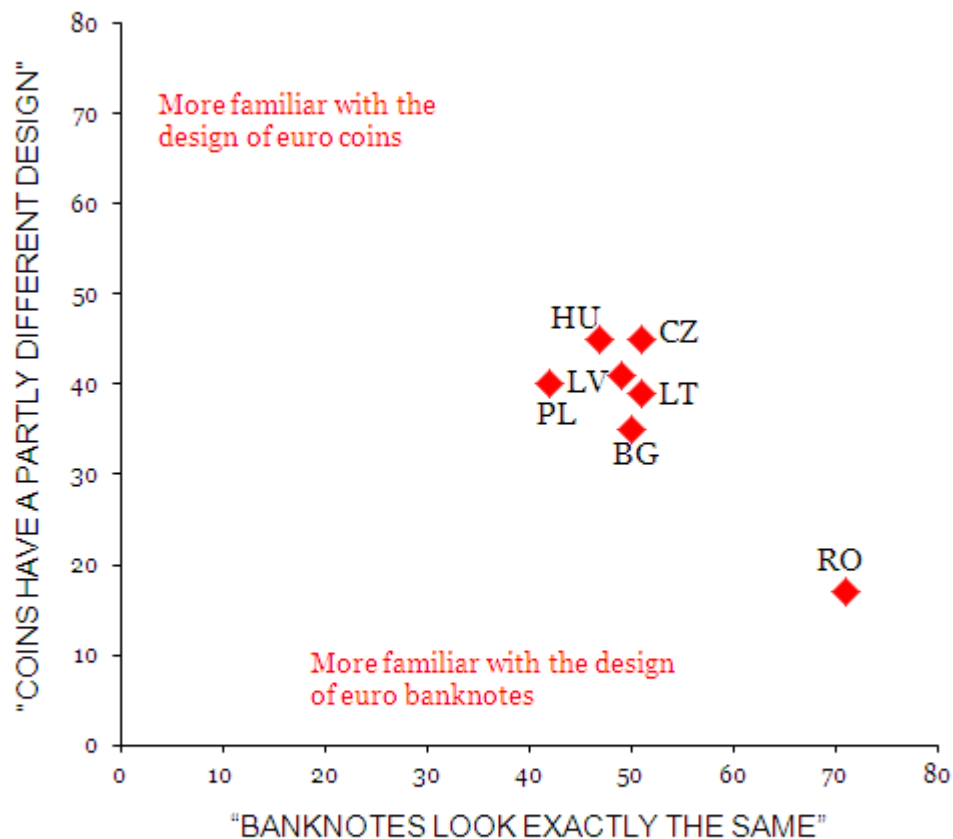


Q4. What do you think, which of the following statements is correct?
% by country

As the following chart shows, with the exception of Romania, the NMS7 countries have broadly similar shares of respondents who are familiar with the design of euro banknotes and the design of euro coins.

As in previous surveys, Romania is an outlier on this question, with respondents tending to be more familiar with the design of euro banknotes (71%) than the respondents in other MNS7 countries, while they were by far the least familiar with the actual design of euro coins (17%). Since November 2011 this gap has narrowed only slightly (from 73% vs. 16%).

The design of the euro money



Q3-Q4. What do you think, which of the following statements is correct?
% by country

The socio-demographic data show that:

- Men (42%) are more likely than women (29%) to say that euro coins have partly different designs from country to country.
- Respondents aged 55 and over (27%) are less likely than individuals aged 40-54 (34%) or 15-39 (41%) to say that euro coins have partly different designs depending on the country.
- Respondents with a higher level of education are more likely to be aware that euro coins have partly different designs from country to country.
- While 42% of self-employed people and 40% of employees are aware that euro coins have partly different designs from country to country, only 32% of people who are not working and 33% of manual workers say the same thing.
- 37% of people who have seen euro coins are aware that they have partly different designs from country to country, as opposed to 25% of those who have not seen them before.
- 41% of respondents who have used euro coins know that they have partly different designs, compared with 28% of those who have not used them before.
- While 45% of people who deem themselves to be informed about the euro say that euro coins have partly different designs from country to country, only 28% of people who say they are not informed give this answer.

Q4 And what do you think, which of the following statements is correct?

	The euro coins look exactly the same in all countries that use the euro	The euro coins have partly different designs from country to country	DK/NA
NMS7	47%	35%	18%



Sex

Male	43%	42%	15%
Female	50%	29%	21%



Age

15-24	53%	41%	6%
25-39	48%	41%	11%
40-54	47%	34%	19%
55 +	43%	27%	30%



Education (End of)

15-	46%	24%	30%
16-19	49%	32%	19%
20+	45%	37%	18%
Still studying	50%	44%	6%



Respondent occupation scale

Self-employed	45%	42%	13%
Employee	46%	40%	14%
Manual workers	51%	33%	16%
Not working	46%	32%	22%

Already seen euro coins

Yes	48%	37%	15%
No	41%	25%	34%

Used euro coins

Yes	47%	41%	12%
No	49%	28%	23%

Level of information about the euro

Total 'Informed'	44%	45%	11%
Total 'Not informed'	50%	28%	22%

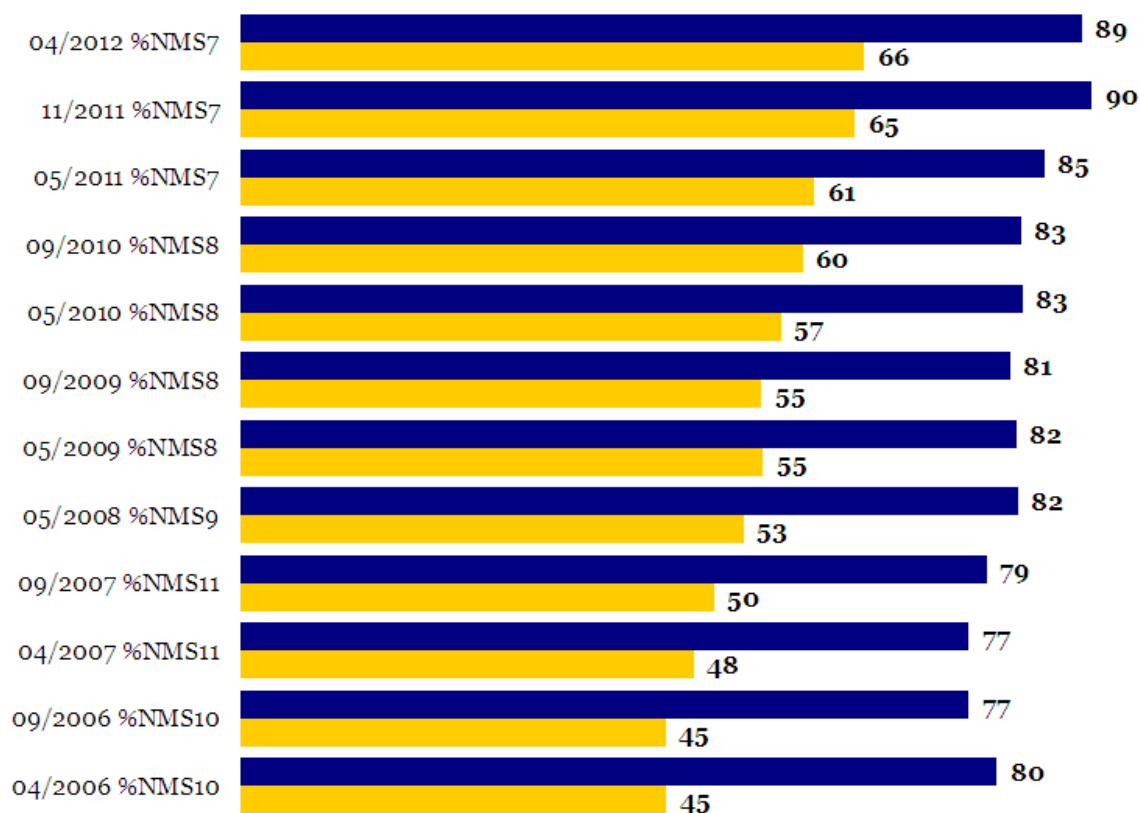
2. EXPERIENCE WITH EURO CASH

2.1. Euro banknotes

- **More people have both seen and used euro banknotes than those that said they had done so in previous surveys -**

Nine out of ten NMS7 respondents (89%) say that they have seen euro banknotes¹⁰, and two thirds (66%) say that they have used them¹¹. These results are very similar to those obtained in November 2011. The proportion of respondents who have seen euro banknotes dropped by 1 percentage point, ending a series of increases over the last few surveys. The proportion of respondents who have used euro banknotes rose by 1 percentage point to the highest level yet recorded by the survey, continuing a long series of increases on this point.

Seen and used euro banknotes



Q1.1. Have you already seen euro banknotes?
 Q2ab.1 Have you already used euro banknotes ?
 %, all respondents

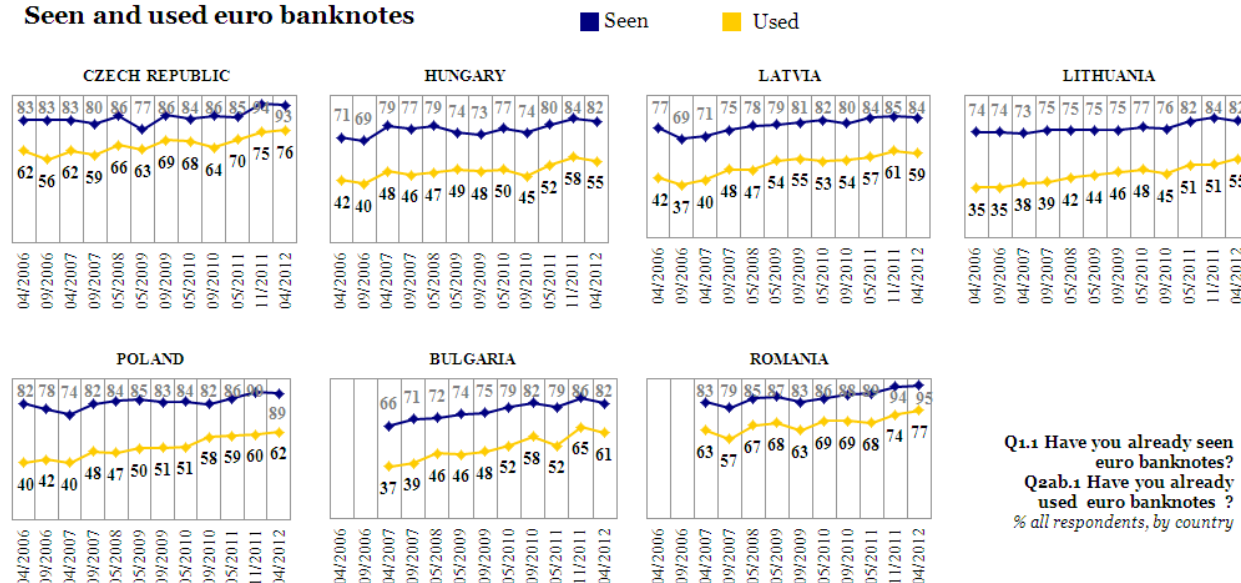
¹⁰ Q1.1: Have you already seen euro banknotes? Yes; no; don't know.

¹¹ Q2ab.1: Have you already used euro banknotes? Yes; no; don't know.

The proportion of respondents who have seen euro banknotes ranges from 95% in Romania and 93% in the Czech Republic, to 82% in Bulgaria, Hungary and Lithuania. The proportion increased slightly in Romania (95%, +1 point), but dropped in the other six countries: Bulgaria (82%, -4 points), Latvia (84%, -1 point), Hungary (82%, -2 points), Lithuania (82%, -2 points), the Czech Republic (93%, -1 point), and Poland (89%, -1 point).

The proportion of respondents who have used euro banknotes ranges from 77% in Romania and 76% in the Czech Republic, to 55% in Hungary and Lithuania. It rose in four countries: the Czech Republic (76%, +1 point), Romania (77%, +3 points), Lithuania (55%, +4 points), and Poland (62%, +2 points). The number of people saying they have used euro banknotes fell in the other three NMS7 countries: Bulgaria (61%, -4 points), Latvia (59%, -2 points), and Hungary (55%, -3 points).

Seen and used euro banknotes







According to the socio-demographic data:

- Men are more likely to have seen euro banknotes than women, by 92% to 87%, and they are also more likely to have used them, by 71% to 61%.
- Respondents who are 55 or over are the least likely to have seen or used euro banknotes. For example, only 52% have used them, compared with 76% of 25-39 year-olds.

- People who spent longer in education are more likely to have seen and used euro banknotes. 71% of those who left education at 20 or over have used them, compared with 39% of those who left at 15 or under.
- Respondents who live in large towns are more likely to have seen and used euro banknotes than those who live in rural villages.
- Respondents who say they are informed about the euro are more likely to say that they have seen and used euro banknotes. For example, while 79% of those who say they are informed have used euro banknotes, only 58% of people who are uninformed say the same thing.





Q1.1 Have you already seen...?

Euro banknotes

	Yes	No
NMS7	89%	11%
 Sex		
Male	92%	8%
Female	87%	13%
 Age		
15-24	88%	12%
25-39	94%	6%
40-54	91%	9%
55 +	85%	15%
 Education (End of)		
15-	75%	25%
16-19	88%	12%
20+	92%	8%
Still studying	90%	10%
 Subjective urbanisation		
Rural village	86%	14%
Small/ Mid-size town	90%	10%
Large town	92%	8%
Level of information about the euro		
Total 'Informed'	94%	6%
Total 'Not informed'	86%	14%

Q2ab.1 Have you already used...?

Euro banknotes

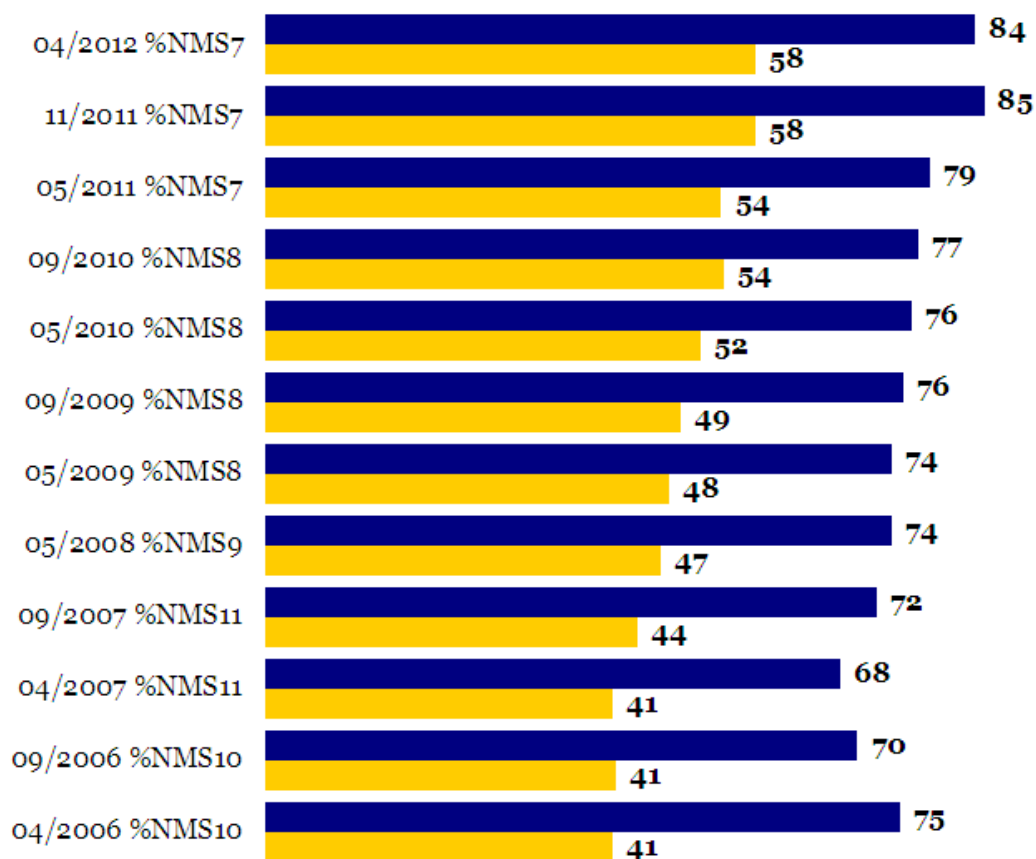
	Yes	No	DK/NA
NMS7	66%	23%	11%
 Sex			
Male	71%	21%	8%
Female	61%	26%	13%
 Age			
15-24	69%	19%	12%
25-39	76%	17%	7%
40-54	70%	21%	9%
55 +	52%	33%	15%
 Education (End of)			
15-	39%	36%	25%
16-19	62%	25%	13%
20+	71%	21%	8%
Still studying	70%	20%	10%
 Subjective urbanisation			
Rural village	57%	29%	14%
Small/ Mid-size town	66%	23%	11%
Large town	73%	19%	8%
Level of information about the euro			
Total 'Informed'	79%	15%	6%
Total 'Not informed'	58%	29%	13%

2.2. Euro coins

- The instance of encountering and using euro coins has not increased over the past six months, as in previous surveys -

As in previous surveys, fewer NMS7 respondents are found to have seen¹² or used¹³ euro coins than have seen or used banknotes. Over eight out of ten (84%) of respondents say they have seen euro coins (vs. 89% who have seen banknotes), down slightly on the 85% who had seen them in November 2011. Six out of 10 respondents (58%) say that they have used euro coins (vs. 66% who have used banknotes), the same result as in November 2011. So while the proportion of respondents who have seen or used euro coins has steadily risen over the lifetime of the survey, the latest wave suggests that this long-term trend has now ceased, at least for the time being.

Seen and used euro coins



Q1.2 Have you already seen euro coins?
 Q2.ab2 Have you already used euro coins ?
% all respondents

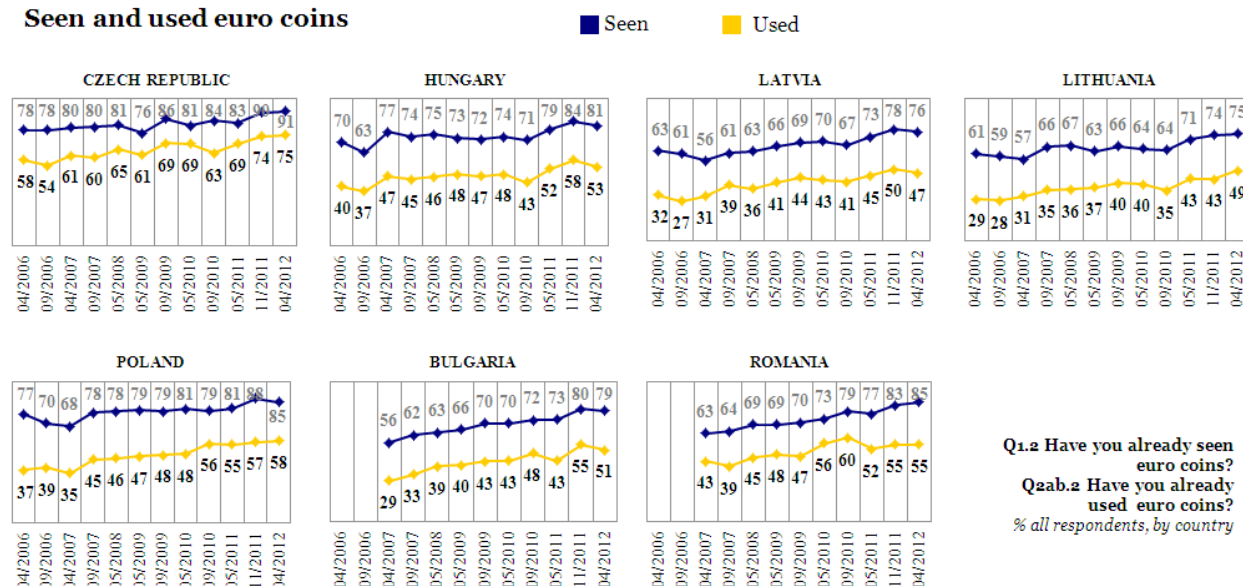
¹² Q1.2: Have you already seen euro coins? Yes; no; don't know.

¹³ Q2ab.2: Have you already used euro coins? Yes; no; don't know.

The proportion of respondents who have seen euro coins ranges from 91% in the Czech Republic to 75% in Lithuania. The proportion who have seen them has increased in three of NMS7 countries since November 2011: Romania (85%, +2 points), Lithuania (74%, +1 point), and the Czech Republic (91%, +1 point). But it fell in the other four countries: Poland (85%, -3 points), Hungary (81%, -3 points), Latvia (76%, -2 points), and Bulgaria (79%, -1 point).

The proportion of respondents who have used euro coins ranges from 75% in the Czech Republic – which has by far the highest result on this question – to 47% in Latvia. Since November 2011 the number of respondents who have used euro coins increased in three countries: the Czech Republic (75%, +1 point), Poland (58%, +1 point) and Lithuania (49%, +6%). It stayed the same in Romania (55%). And it fell in the remaining three countries: Hungary (53%, -5 points), Bulgaria (51%, -4 points), and Latvia (47%, -3 points).

Seen and used euro coins



Analysis of the socio-demographic data shows that:


- Men are more likely to have seen euro coins than women, by a margin of 88% to 80%, and are also more likely to have used them, by a margin of 63% to 53%.
- Respondents who are 55 or over are the least likely to have seen or used euro coins. Only 71% have seen them, compared with 93% of 25-39 year-olds. And only 42% have used them, vs. 69% of 25-39 year-olds.
- People who spent longer in education are more likely to have seen and used euro coins. 87% of those who left education at 20 or over have seen them, for example, compared with 68% of those who left at 15 or under.


- Respondents who live in large towns are more likely to have seen and used euro coins than those who live in rural villages.
- People in work (89-93%) are more likely to have seen euro coins than those not in work (77%). Self-employed people (76%) are the most likely to have used them, while those not in work (48%) are the least likely to have done so.
- 90% of people who feel they are informed about the euro say they have seen euro coins, compared with 80% of people who do not feel informed. 71% of people in the 'informed' group have used euro coins, as opposed to 49% of those in the 'not informed' category.


Q1.2 Have you already seen...?


Euro coins


	Yes	No
NMS7	84%	16%

 Sex		
Male	88%	12%
Female	80%	20%

 Age		
15-24	90%	10%
25-39	93%	7%
40-54	87%	13%
55 +	71%	29%

 Education (End of)		
15-	68%	32%
16-19	81%	19%
20+	87%	13%
Still studying	91%	9%

 Subjective urbanisation		
Rural village	81%	19%
Small/ Mid-size town	84%	16%
Large town	86%	14%


 Respondent occupation scale		
Self-employed	93%	7%
Employee	92%	8%
Manual workers	89%	11%
Not working	77%	23%


Level of information about the euro		
Total 'Informed'	90%	10%
Total 'Not informed'	80%	20%


Q2ab.2 Have you already used...?


Euro coins


	Yes	No	DK/NA
NMS7	58%	26%	16%

 Sex			
Male	63%	25%	12%
Female	53%	27%	20%

 Age			
15-24	62%	27%	11%
25-39	69%	23%	8%
40-54	61%	26%	13%
55 +	42%	29%	29%

 Education (End of)			
15-	35%	33%	32%
16-19	51%	30%	19%
20+	64%	23%	13%
Still studying	64%	27%	9%

 Subjective urbanisation			
Rural village	50%	31%	19%
Small/ Mid-size town	58%	26%	16%
Large town	64%	22%	14%

 Respondent occupation scale			
Self-employed	76%	17%	7%
Employee	70%	22%	8%
Manual workers	57%	31%	12%
Not working	48%	29%	23%

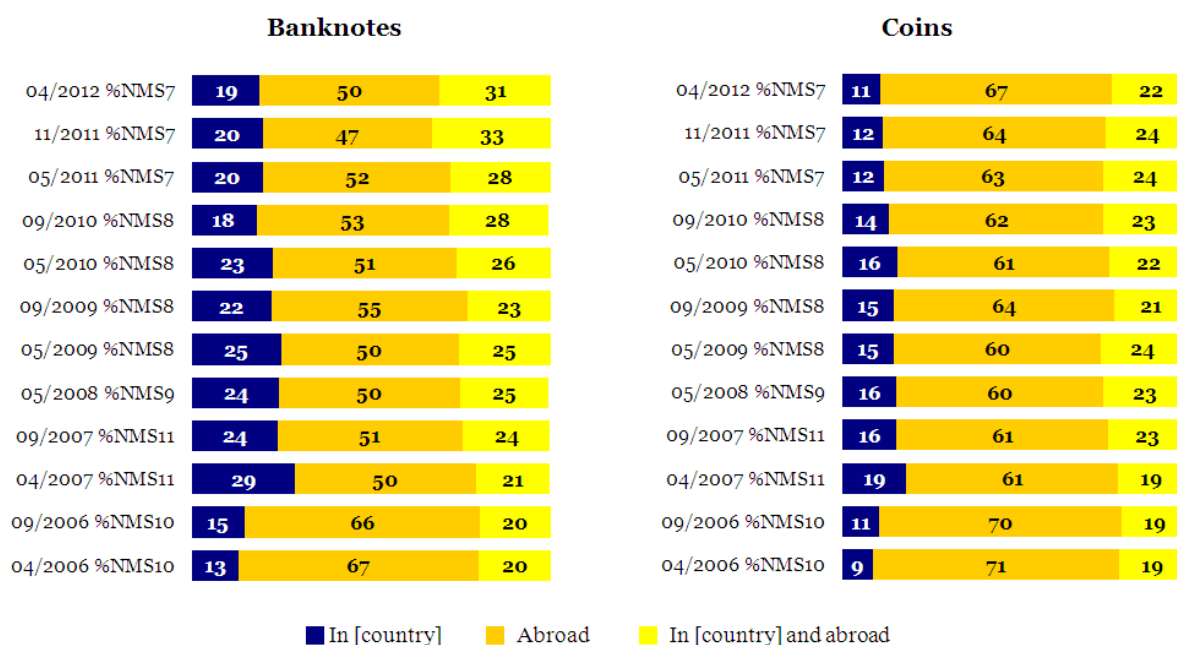
Level of information about the euro			
Total 'Informed'	71%	19%	10%
Total 'Not informed'	49%	31%	20%

2.3. Where do people use the euro?

- Half of all respondents who have used euro banknotes have only used them abroad -

This question applies only to respondents who say that they have used euro banknotes¹⁴ and/or coins¹⁵. Half (50%) of the people in this group say they have only used euro banknotes abroad, up from the 47% who said this in November 2011 but still less than the 52% who said this in May 2011. Just under a third (31%) say that they have used them in their own country and abroad (down from 33% in November 2011), and 19% say they have used them in their own country (-1 point).

Two thirds (67%) of respondents say they have used euro coins abroad, up from the 64% who said this in November 2011. This is the highest proportion of NMS7 respondents to have given this answer since September 2006. A fifth (22%) say that they have used them in their own country and abroad (-2 points), and 11% say they have used them in their own country (-1 point).



Q2b. /Q2c. You said you already used euro banknotes/coins. Was it ..?
 Base: those, who have already used euro banknotes/coins

As in previous waves of the survey, in five countries more respondents have only used euro banknotes abroad than have used them domestically: the Czech Republic,

¹⁴ Q2b: You said you already used euro banknotes. Was it: in (OUR COUNTRY); abroad; in (OUR COUNTRY) and abroad; don't know/no answer.

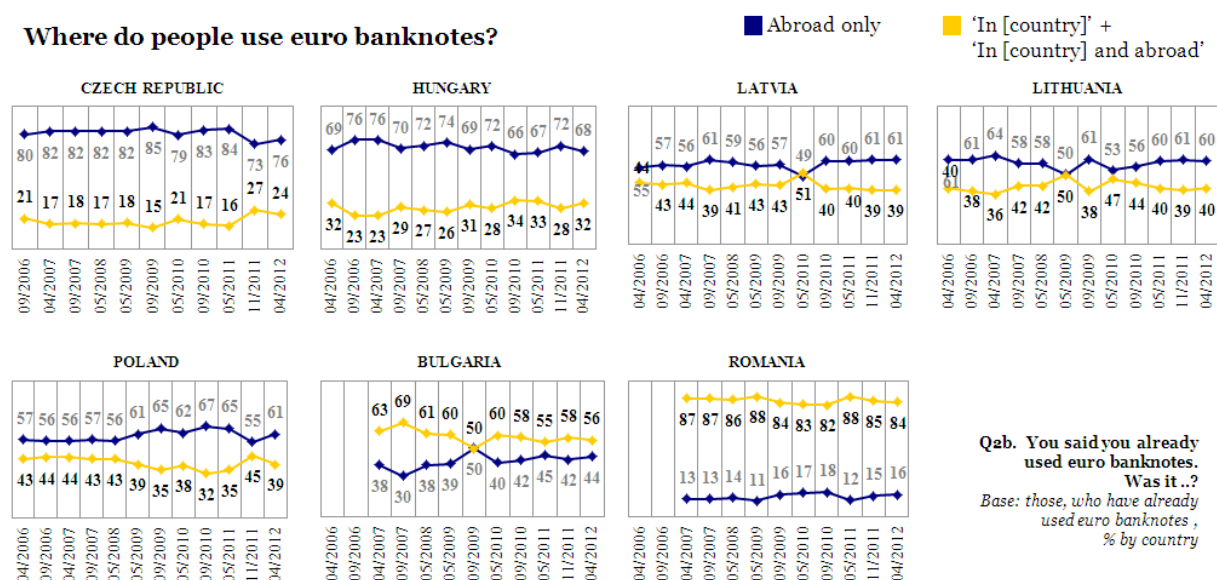
¹⁵ Q2c: You said you already used euro coins. Was it: in (OUR COUNTRY); abroad; in (OUR COUNTRY) and abroad; don't know/no answer.

Hungary, Latvia, Lithuania and Poland. However, in Bulgaria and Romania more people say they have used euro banknotes in their own country than say they have only used them abroad.

The gap between the proportion of people saying they have only used euro banknotes abroad and the proportion saying they have used them in their own country is widest in the Czech Republic (76% abroad only, 24% in their own country), followed by Hungary (68% abroad only, 32% in their own country), Latvia (61% abroad only, 39% in their own country), Poland (61% abroad only, 39% in their own country), and Lithuania (60% abroad only, 40% in their own country). The gap in the other direction is most considerable in Romania (16% abroad only, 84% in their own country), followed by Bulgaria (44% abroad only, 56% in their own country).

The proportion of people saying they use euro banknotes abroad only climbed in four countries: Poland (61%, +6 points), the Czech Republic (76%, +3 points), Bulgaria (44%, +2 points), and Romania (16%, +1 point). It stayed the same in Latvia (61%), and fell slightly in Hungary (68%, -4 points), and Lithuania (60%, -1 point).

Where do people use euro banknotes?

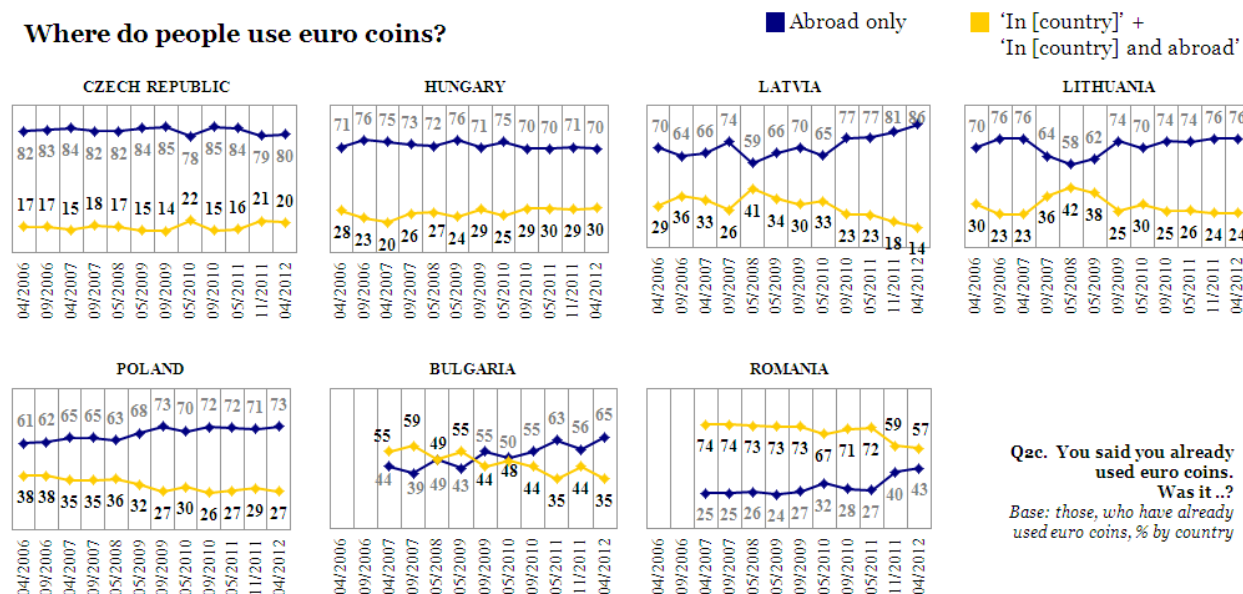


In all NMS7 countries except Romania – which was also the only exception in the previous wave of the survey – more respondents have only used euro coins abroad than have used them domestically or both at home and abroad. The gap between the proportion of people saying they have only used euro coins abroad and the proportion saying they have used them in their own country is widest in Latvia (86% abroad only, 14% used in their own country), followed by the Czech Republic (80% abroad only, 20% used in their own country), Lithuania (76% vs. 24%), Hungary (70% vs. 30%),

Poland (73% vs. 27%), and Bulgaria (65% vs. 35%). In Romania, the gap works in the other direction (43% abroad only, 57% used in their own country).

The proportion of people saying they only used euro coins abroad increased in five countries: Bulgaria (65%, +9 points), Latvia (86%, +5 points), Romania (43%, +3 points), the Czech Republic (80%, +1 point), and Poland (73%, +2 points). It stayed the same in Lithuania (76%) and fell slightly in Hungary (70%, -1 point).

Where do people use euro coins?






The socio-demographic data show that:

- Women are more likely than men to say they have only used euro banknotes abroad (by a margin of 56% to 45%) and also that they have only used euro coins abroad (by a margin of 72% to 62%).
- Respondents who spent longer in education are more likely only to have used euro banknotes or coins abroad.
- People who live in large towns are the most likely to say they have only used euro banknotes and coins abroad, while those who live in rural villages are the least likely to say this.
- Individuals who consider themselves to be informed about the euro are more likely to have used euro banknotes and coins both at home and abroad than those who do not consider themselves informed. However, people who say they are uninformed are more likely to have used euro banknotes only in their own country.

- People who expect the introduction of the euro to have negative consequences for their country and for them personally are more likely to have used the euro abroad only than those who anticipate positive consequences.
- 56% of those against the introduction of the euro have only used euro banknotes abroad, compared with 44% who are in favour of its introduction.

Q2c You said you already used euro coins. Was it...?

	In (OUR COUNTRY)	Abroad	In (OUR COUNTRY) and abroad	DK/NA
NMS7	11%	67%	22%	-
 Sex				
Male	12%	62%	26%	-
Female	10%	72%	18%	-
 Education (End of)				
15-	37%	44%	18%	1%
16-19	13%	65%	22%	-
20+	9%	67%	24%	-
Still studying	9%	74%	17%	-
 Subjective urbanisation				
Rural village	14%	62%	24%	-
Small/ Mid-size town	11%	66%	23%	-
Large town	9%	70%	21%	-
Level of information about the euro				
Total 'Informed'	10%	64%	26%	-
Total 'Not informed'	12%	69%	19%	-
Expected consequences of the euro for own country				
Total 'Positive'	12%	65%	23%	-
Total 'Negative'	9%	68%	23%	-
Expected personal consequences of the euro				
Total 'Positive'	12%	63%	25%	-
Total 'Negative'	9%	70%	21%	-
Attitude towards the introduction of the euro in the country				
Total 'In favour'	13%	63%	24%	-
Total 'Against'	9%	70%	21%	-

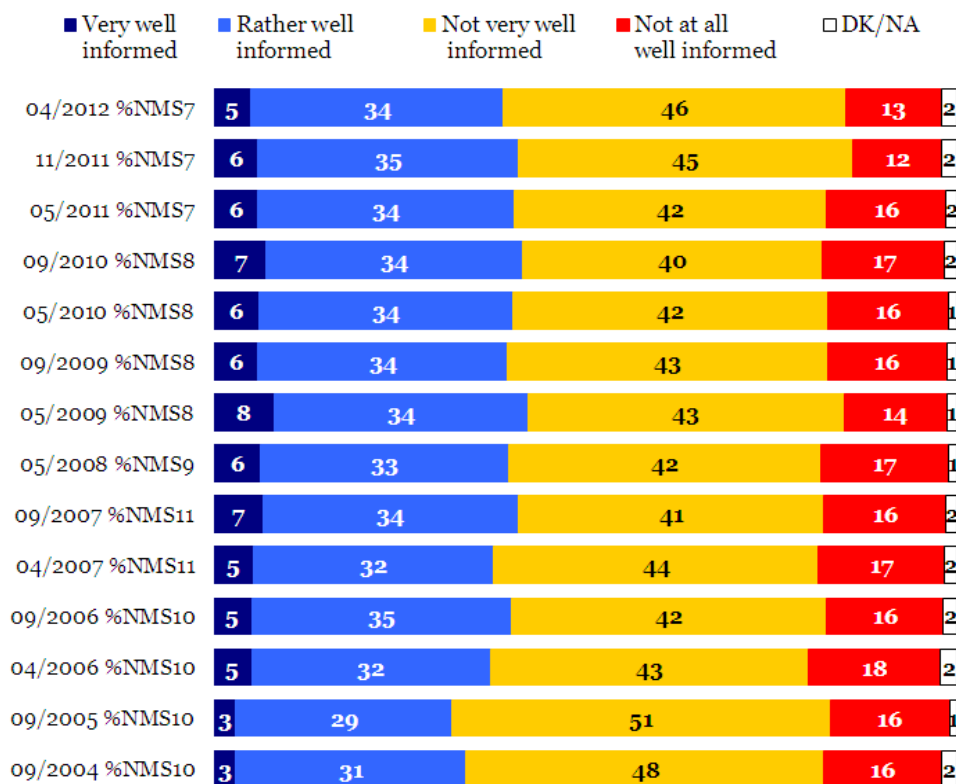
II. INFORMING CITIZENS ABOUT THE EURO

1. SELF-PERCEIVED LEVEL OF INFORMATION

- A growing majority of NMS7 respondents do not feel well informed about the euro -

A majority of NMS7 respondents (59%) do not feel well informed about the euro: 46% say they are not very well informed, and 13% say they are not at all well informed¹⁶. This marks a slight increase on the November 2011 results, when 45% said they were not very well informed, and 12% said they were not at all well-informed. Overall, 39% of respondents consider themselves to be well informed. A third (34%) say they are rather well informed (down slightly from 35% in November 2011), and 5% say they are very well informed (-1 point).

Evolution of self-perceived information level regarding the euro, %



Q6. To what extent do you feel informed about the euro? Do you feel...:

¹⁶ Q6: To what extent do you feel informed about the euro? Do you feel: very well informed; rather well informed; not very well informed; not at all well informed; don't know/no answer.

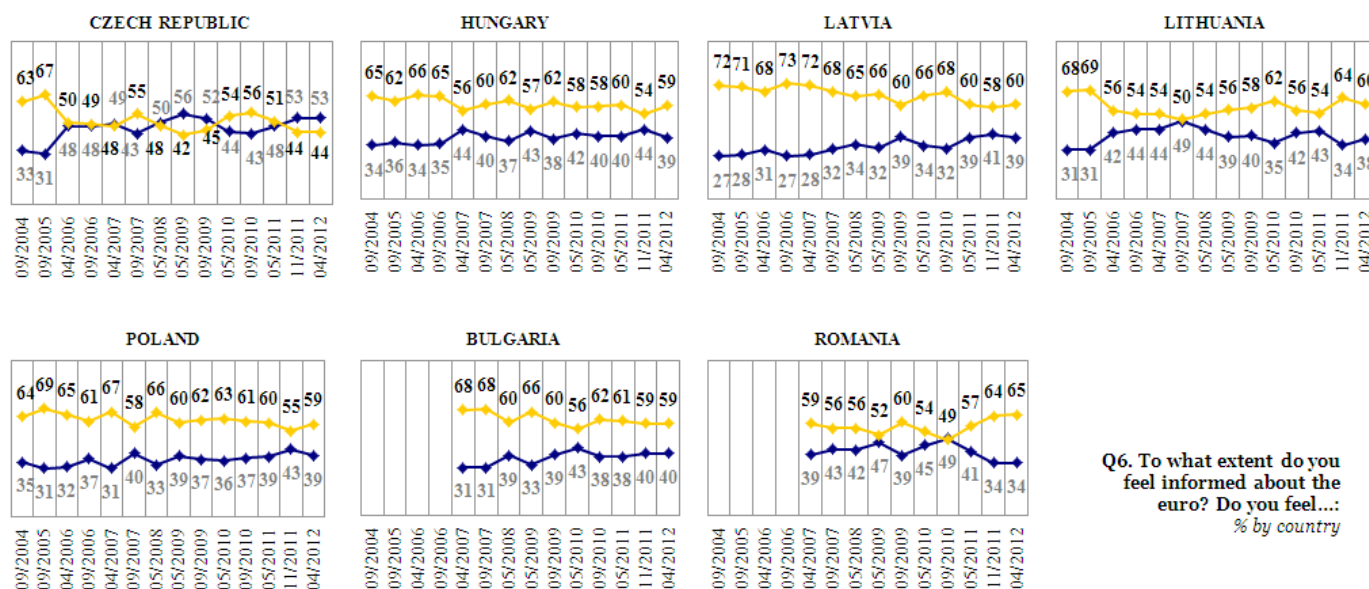
As in the previous wave of the survey, the Czech Republic is the only NMS7 country in which more respondents feel well informed about the euro than feel not well informed: 53% say they are well informed (i.e. either very well-informed or quite well-informed), while 44% say they are not well informed (i.e. either not very well-informed or not at all well-informed). But in the other six NMS7 countries, a majority of respondents say they are not well informed: Romania, 65% not well informed vs. 34% well informed; Lithuania, 60% vs. 38%; Latvia, 60% vs. 39%; Poland, 59% vs. 39%; Hungary, 59% vs. 39% well-informed; and Bulgaria, 59% vs. 40%.

Looking at the changes that have occurred since November 2011, the proportion of respondents who say they are not well informed about the euro has increased in four countries: Hungary (+5 points), Poland (+4 points), Latvia (+2 points) and Romania (+1 point). It remained unchanged in the Czech Republic and Bulgaria, and fell in just one country: Lithuania (-4 points).

Evolution of self-perceived information level regarding the euro, %

■ % of quite well and very well-informed

■ % not very well and not at all informed







Q6. To what extent do you feel informed about the euro? Do you feel...:
% by country

The socio-demographic data show that:

- Men are more likely to feel well informed about the euro than women, by a margin of 48% to 32%.
- People who spent longer in education are more likely to feel well informed: 44% of people who left education aged 20 or over feel they are well informed, compared with just 23% who left at 15 or under.
- While 43% of people who live in large towns feel informed about the euro, only 34% of those who live in rural villages say the same thing.
- While 48% of self-employed people feel well informed about the euro, only 35% of manual workers and 36% of those who are not working feel the same way.
- Those who have already seen and used euro banknotes and coins are more likely to feel well informed about the currency.
- Respondents who think the consequences of the euro will be positive either for their country or for themselves are more likely to say that they are well informed about it than those who think it will have negative consequences.
- People in favour of introducing the euro are more likely to say they are informed than those who are not in favour, by a margin of 45% to 36%.

Q6 To what extent do you feel informed about the euro? Do you feel:

	Total 'Informed'	Total 'Not informed'	DK/NA
NMS7	39%	59%	2%
 Sex			
Male	48%	51%	1%
Female	32%	66%	2%
 Education (End of)			
15-	23%	74%	3%
16-19	36%	62%	2%
20+	44%	55%	1%
Still studying	41%	59%	-
 Subjective urbanisation			
Rural village	34%	65%	1%
Small/ Mid-size town	40%	58%	2%
Large town	43%	55%	2%
 Respondent occupation scale			
Self-employed	48%	50%	2%
Employee	44%	55%	1%
Manual workers	35%	64%	1%
Not working	36%	62%	2%
Already seen euro banknotes			
Yes	42%	57%	1%
No	23%	74%	3%
Already seen euro coins			
Yes	43%	56%	1%
No	23%	75%	2%
Used euro banknotes			
Yes	47%	52%	1%
No	25%	73%	2%
Used euro coins			
Yes	49%	50%	1%
No	29%	69%	2%
Expected consequences of the euro for own country			
Total 'Positive'	44%	55%	1%
Total 'Negative'	37%	61%	2%
Expected personal consequences of the euro			
Total 'Positive'	46%	53%	1%
Total 'Negative'	36%	62%	2%
Attitude towards the introduction of the euro in the country			
Total 'In favour'	45%	54%	1%
Total 'Against'	36%	62%	2%

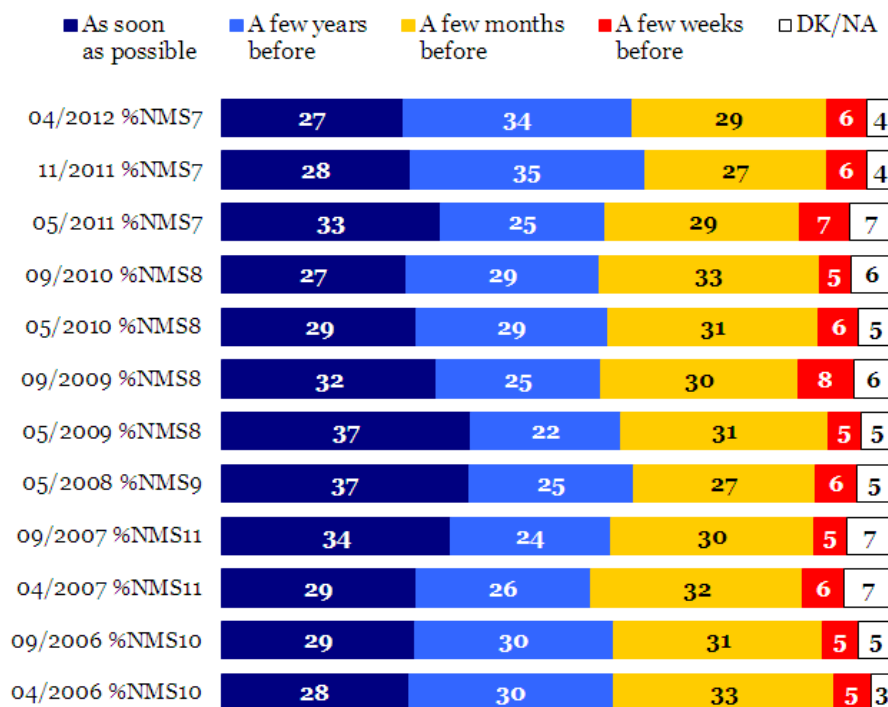
2. TIMING, CHANNELS AND CONTENT OF INFORMATION

2.1. Timing for the receipt of information about the euro

- A majority of people who do not feel well informed about the euro would like to be informed about its introduction as soon as possible or a few years before euro introduction -

This question applies only to people who said previously that they did not feel well informed about the euro. People in this group were asked when they would like to receive information about the introduction of the euro¹⁷. Most respondents say that they would like to receive information some time in advance of this event. Over a quarter (27%, -1 point compared with November 2011) would like to receive information as soon as possible. A third (34%, -1 point) would like to receive information a few years beforehand. Nearly three out of 10 respondents (29%, +2 points) would like to get their information a few months beforehand. Just a small minority (6%, no change) would like to receive information only a few weeks before.

Desired timeframe for being informed about the euro



Q7. When would you like to be informed about the introduction of the euro in [COUNTRY]?

Base: who are not informed

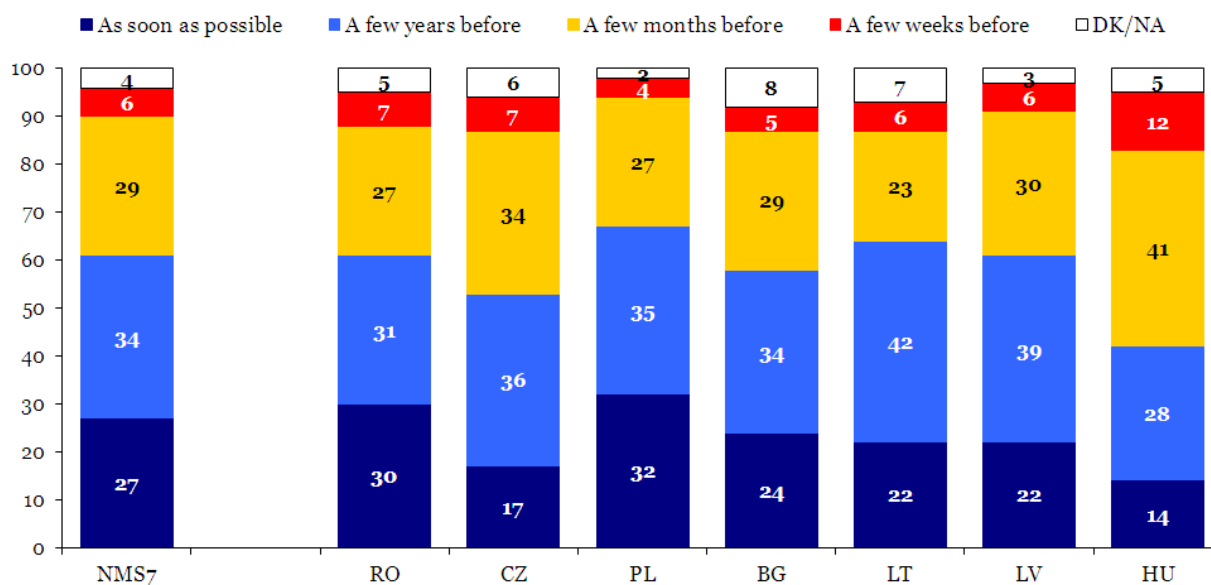
¹⁷ Q7: When would you like to be informed about the introduction of the euro in [COUNTRY]? As soon as possible; a few years before; a few months before; a few weeks before; don't know/no answer

The proportion of respondents who would like to receive information as soon as possible ranges from 32% in Poland and 30% in Romania, to 14% in Hungary and 17% in the Czech Republic. Those saying they would like to receive information a few years before ranges from 42% in Lithuania to 28% in Hungary.

Respondents in Hungary (41%) are the most likely to say that they would like to receive information a few months before, while those in Lithuania (23%) are the least likely to say this. Respondents in Hungary (12%) are also the most likely to say they would like to receive information a few weeks before the introduction of the euro, with just 4% of respondents in Poland saying this.

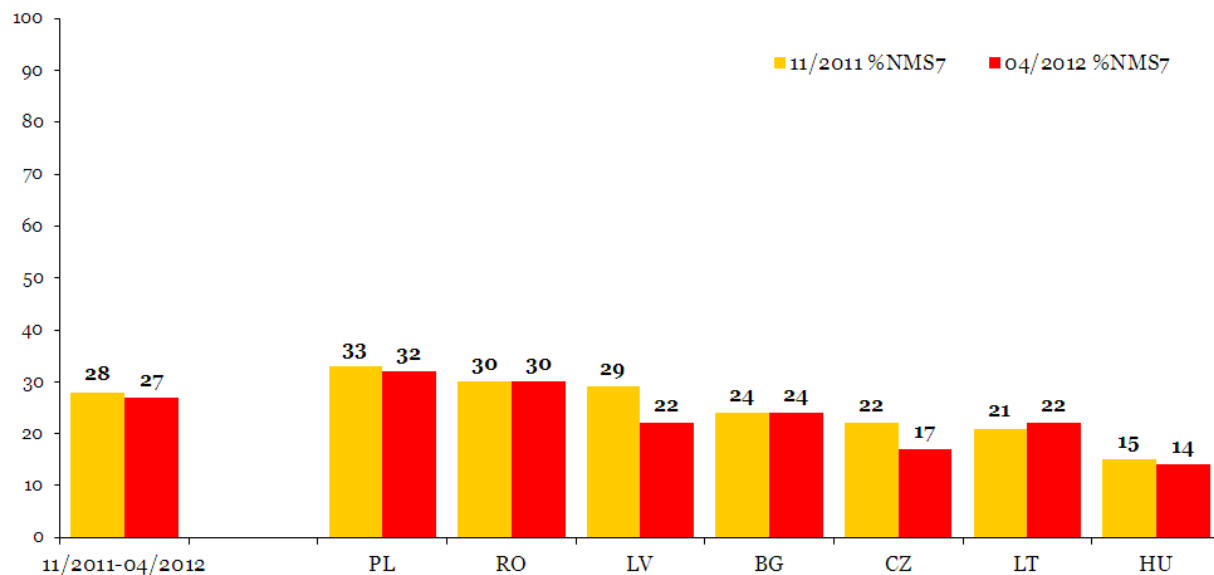
Hungary is therefore the only country where a majority (53%) of respondents would be satisfied with receiving information about the euro either months or weeks in advance. In the other six countries, a majority of respondents would like information to be provided years in advance or as soon as possible.

Desired timeframe for being informed about the euro



Q7. When would you like to be informed about the introduction of the euro in [COUNTRY]?
Base: who are not informed, % by country

The proportion of respondents who say that they would like to receive information as soon as possible increased in only one country: Lithuania (22%, +1 point). It remained the same in Romania (30%) and Bulgaria (24%). And it fell in the remaining four Member States: Latvia (22%, -7 points), the Czech Republic (17%, -5 points), Hungary (14%, -1 point), and Poland (32%, -1 point).




Desired timeframe for being informed about the euro (% "as soon as possible")

Q7. When would you like to be informed about the introduction of the euro in [COUNTRY]?
 Base: who are not informed, % by country

Analysis of the socio-demographic data¹⁸ shows that:

- Men are more likely to want to receive information about the introduction of the euro a few years before, by a margin of 37% to 32%, while women are more likely to want to know about it a few months before, by a margin of 31% to 24%.
- Younger respondents are the most likely to want to receive information as soon as possible, while those in the 55-and-over age category are the most likely to say they would like to receive information a few years before.
- Respondents who spent longer time in education are more inclined to say they would like to receive information a few years before (39%) while those still studying would prefer receiving information as soon as possible (37%).
- While 40% of respondents who think the consequences of joining the euro is negative in the countries that have it would like to receive information a few years before, only 29% of people who think the consequences are positive say this.
- People in favour of adopting the euro (31%) are more likely to want to receive information about its introduction as soon as possible than those who are against it (26%). But 40% of people who are against it would like to receive information a few years before, compared with 29% of those who are in favour.

Q7 When would you like to be informed about the introduction of euro in (OUR COUNTRY)?

	As soon as possible	A few years before	A few months before	A few weeks before	DK/NA
NMS7	28%	34%	28%	6%	4%
 Sex					
Male	28%	37%	24%	7%	4%
Female	29%	32%	31%	5%	3%
 Age					
15-24	36%	24%	31%	8%	1%
25-39	32%	34%	25%	7%	2%
40-54	27%	35%	29%	6%	3%
55 +	21%	39%	27%	5%	8%
 Education (End of)					
15-	28%	24%	29%	10%	9%
16-19	26%	32%	30%	7%	5%
20+	27%	39%	25%	5%	4%
Still studying	37%	24%	32%	7%	-
Consequences in countries already using it					
Total 'Positive'	32%	29%	30%	7%	2%
Total 'Negative'	25%	40%	25%	5%	5%
Attitude towards the introduction of the euro in the country					
Total 'In favour'	31%	29%	30%	7%	3%
Total 'Against'	26%	40%	25%	5%	4%

2.2. Trusted distributors of information on the euro

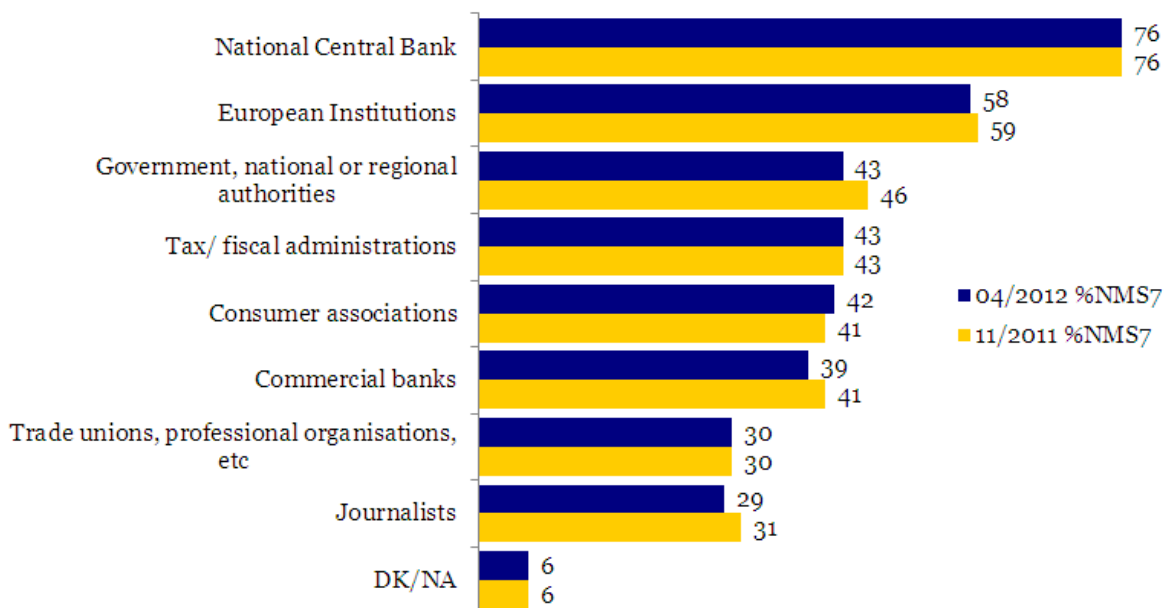
¹⁸ Base: all respondents

- A majority of respondents trust information provided by their national central bank and by European institutions -

All NMS7 respondents were asked whether they would trust information provided on the changeover to the euro from a series of institutions or groups¹⁹.

An absolute majority of respondents say they would trust information provided by their national central bank (76%, no change compared with November 2011) and by European institutions (58%, -1 point). Over four out of ten respondents say they would trust information provided by the government, national or regional authorities (43%, -3 points); tax/fiscal administrations (43%, no change); commercial banks (39%, -2 points); and consumer associations (42%, +1 point). Only 29% (-2 points) say they would trust information provided by journalists, while 30% (no change) say they would trust information provided by trade unions, professional organisations, etc.

Trusted distributors of information on the euro



Q8 For each of the following institutions or groups, please tell me if you would trust information they provide on the changeover to the euro?

Base: all respondents, % NMS7

The national central bank is the most trusted source of information in five NMS7 countries: the Czech Republic (87%), Romania (85%), Hungary (74%), Bulgaria (74%), and Poland (70%). While a majority of respondents also trust information from








¹⁹ Q8: For each of the following institutions or groups, please tell me if you would trust information they provide on the changeover to the euro? (ROTATE - MULTIPLE ANSWERS POSSIBLE). Government, national or regional authorities; tax/ fiscal administrations; National Central Bank; European institutions; commercial banks; journalists; trade unions, professional organisations, etc; consumer associations; don't know/no answer.

the national central bank in Lithuania (62%) and Latvia (65%), more people (70%) there say they trust European institutions, respectively 64% and 67%.

The national central bank and European institutions are the two most trusted sources of information in all countries apart from the Czech Republic, where commercial banks (63%) are the second most trusted source (the national central bank being the first, 87%).

Respondents in some countries tend to be more trusting of the information sources in general than people in other countries. In the Czech Republic, for example, a majority of people say they trust six out of the eight sources under discussion (all except journalists and trade unions). But at the other end of the scale, only two of the sources of information (the national central bank and European institutions) are trusted by a majority of respondents in Bulgaria, Hungary and Poland.

Q8 For each of the following institutions or groups, please tell me if you would trust information they provide on the changeover to the euro?

	National Central Bank	European Institutions	Government, national or regional authorities	Tax/fiscal administrations	Consumer associations	Commercial banks	Trade unions, professional organisations, etc	Journalists	Don't know
NMS 7	76%	58%	43%	43%	42%	39%	30%	29%	6%
 BG	74%	59%	47%	39%	40%	39%	25%	32%	7%
 CZ	87%	57%	53%	58%	56%	63%	32%	25%	3%
 LV	65%	67%	50%	53%	39%	41%	44%	29%	5%
 LT	62%	64%	47%	45%	34%	29%	30%	29%	6%
 HU	74%	50%	47%	48%	45%	43%	30%	17%	6%
 PL	70%	50%	39%	34%	37%	24%	27%	27%	8%
 RO	85%	73%	41%	48%	43%	54%	33%	41%	3%

Highest percentage per country

Lowest percentage per country

Highest percentage per item

Lowest percentage per item

Comparing the results with those from November 2011, the trends vary from country to country. In Bulgaria, trust in all eight institutions or groups has increased over the last six months, with trust in the national central bank (74%, +12 points) and tax/fiscal administrations (39%, +9 points) having risen the most.

In the Czech Republic, the level of trust in the various institutions has remained similar to the results seen in November 2011. Trust in the government (53%, -3 points) and commercial banks (63%, -3 points) fell slightly, for example, whereas trust in tax/fiscal administrations (58%, +2 points) and European institutions (57%, +1 point) rose slightly.

In Latvia, trust in all eight institutions or groups increased, with the exception of the national central bank, with trust in that institution remaining unchanged since November 2011 (65%). Relatively large increases in trust were observed in European institutions (67%, +6 points) and in trade unions (44%, +6 points).

In contrast with the countries discussed so far, in Lithuania the level of trust fell in all eight cases. The largest drops in trust related to trade unions (30%, -7 points), tax/fiscal authorities (45%, -7 points), and European institutions (64%, -6 points).

In Hungary, trust increased in seven of the types of institution, with only European institutions (50%, -3 points) experiencing a decrease in trust. Trust in consumer associations (45%, +5 points) and commercial banks (43%, +5 points) increased the most.

In Poland, as with Lithuania, trust in all eight types of information provider declined. Trust in the information provided by the government (39%, -7 points) and by journalists (27%, -7 points) fell the most.





In Romania, the results generally remained similar to those obtained in November 2011. The largest increase in trust occurred in the case of consumer associations (43%, +5 points), while trust in the government fell slightly (41%, -2 points).

Analysis of the socio-demographic data shows that:

- There is little difference between men and women on this question.
- Younger respondents trust all the sources of information under consideration more, apart from journalists, whom the 15-24 age group trust less than any of the other age categories.
- Respondents with a higher level of education are more trusting of most of the sources of information, with the exception of trade unions and commercial banks. People who are still studying trust the most all the sources of information, except journalists. People who left school at a younger age are more likely to trust trade unions while commercial banks are trusted more by those who left school between 16 and 19 years old.

- People who live in large towns are the most likely to trust the government and European institutions, while people who live in rural villages are the most likely to trust trade unions and journalists.
- Employees are the most likely to trust the government, tax/fiscal administrations, the central bank, and European institutions. Manual workers are the most likely to trust trade unions, consumer associations and journalists.
- People who say they are informed about the euro are more likely to trust all the sources of information, with the exception of trade unions.
- Respondents in favour of introducing the euro and those who expect the euro to have positive consequences both for their country and for themselves are more likely to trust all eight sources of information, apart from trade unions where respondents who expect the euro to have negative consequences for themselves are at the same level (30% both).

Q8 For each of the following institutions or groups, please tell me if you would trust information they provide on the changeover to the euro?

	National Central Bank	European Institutions	Government, national or regional authorities	Tax/ fiscal administrations	Consumer associations	Commercial banks	Trade unions, professional organisations, etc	Journalists	DK/NA
NMS7	76%	58%	43%	43%	42%	39%	30%	29%	6%
 Age									
15-24	83%	72%	52%	56%	51%	49%	43%	27%	5%
25-39	79%	64%	43%	50%	49%	43%	32%	31%	5%
40-54	75%	55%	42%	42%	40%	37%	27%	31%	6%
55 +	71%	47%	39%	30%	32%	33%	23%	28%	8%
 Education (End of)									
15-	66%	48%	33%	40%	38%	37%	35%	29%	12%
16-19	75%	55%	42%	41%	39%	38%	29%	31%	6%
20+	77%	57%	44%	41%	41%	37%	26%	28%	6%
Still studying	85%	76%	52%	58%	54%	53%	46%	27%	3%
 Subjective urbanisation									
Rural village	74%	55%	40%	42%	42%	40%	32%	33%	7%
Small/ Mid-size town	75%	56%	42%	41%	40%	37%	30%	27%	8%
Large town	79%	62%	47%	45%	43%	41%	27%	29%	4%
 Respondent occupation scale									
Self-employed	75%	57%	40%	40%	41%	34%	23%	31%	6%
Employee	80%	63%	47%	48%	44%	43%	26%	27%	4%
Manual workers	76%	56%	39%	45%	45%	39%	36%	34%	6%
Not working	74%	56%	43%	40%	40%	39%	31%	29%	7%
Level of information about the euro									
Total 'Informed'	80%	62%	49%	47%	46%	45%	28%	30%	4%
Total 'Not informed'	74%	56%	40%	40%	39%	36%	31%	29%	7%
Expected consequences of the euro for own country									
Total 'positive'	84%	68%	54%	48%	43%	46%	31%	33%	3%
Total 'negative'	71%	52%	36%	40%	42%	35%	30%	27%	8%
Expected personal consequences of the euro									
Total 'positive'	84%	69%	52%	50%	44%	47%	30%	33%	3%
Total 'negative'	71%	51%	36%	38%	41%	34%	30%	27%	9%
Attitude towards the introduction of the euro in the country									
Total 'In favour'	82%	66%	52%	47%	43%	45%	30%	33%	3%
Total 'Against'	70%	51%	36%	39%	41%	34%	30%	26%	8%

2.3. Preferred channels for information campaign

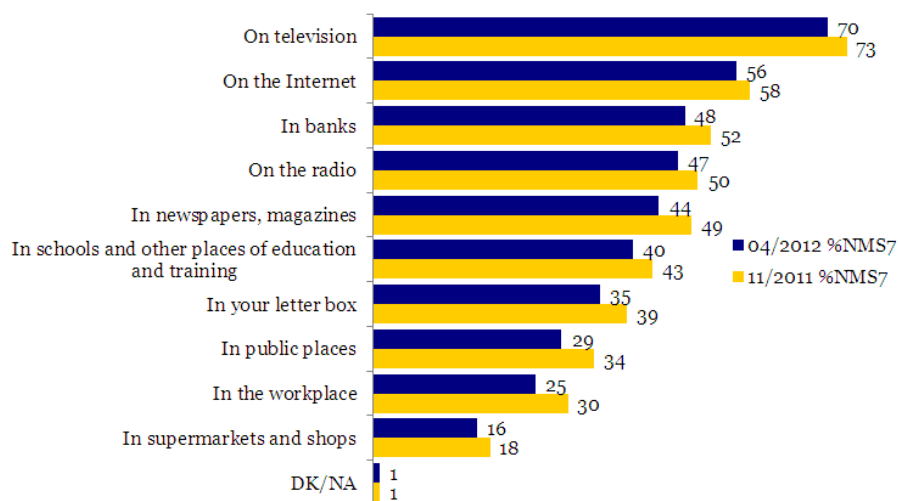
- The perceived usefulness of all 10 information channels has declined over the last six months -

All NMS7 respondents were asked what they would consider the most useful way to receive information about the euro and the changeover²⁰. The data show that respondents consider all 10 ways of providing information under discussion here to be less useful than they did six months earlier.

Seven out of 10 respondents (70%, -3 points compared with November 2011) think it would be useful to receive information on television. A majority (56%, -2 points) also thinks it would be useful to receive information on the internet. Just under half think it would be useful to come by this kind of information in banks (48%, -4 points), and on the radio (47%, -3 points).

Over four out of 10 respondents think it would be useful to be given information in newspapers and magazines (44%, -5 points), and for information to be provided in schools and other places of education and training (40%, -3 points). Fewer than four in ten think it would be useful to get information in their letterbox (35%, -4 points); in public places (29%, -5 points); in the workplace (25%, -5 points); and in supermarkets and shops (16%, -2 points).

Preferred channels for information campaign










Q9 Where would it be most useful for you to receive information about the euro and the changeover?

Base: all respondents, % NMS7

²⁰ Q9: Where would it be most useful for you to receive information about the euro and the changeover? (ROTATE - MULTIPLE ANSWERS POSSIBLE). In banks; in supermarkets and shops; in public places; in schools and other places of education and training; in the workplace; on the radio; on the television; in newspapers, magazines; in your letter box; on the internet; don't know/no answer.

Television is regarded as the most useful source of information in six of the NMS7 countries: Romania (78%), Latvia (76%), Poland (68%), Bulgaria (71%), Lithuania (65%), and Hungary (61%). While 69% of respondents in the Czech Republic also think it would be useful to be able to access information about the euro on television, 78% think it would be useful to obtain it from banks. The internet is regarded as the second most useful source of information in all countries except the Czech Republic (TV, 69%), with banks shared second in Romania.

Q9 Where would it be most useful for you to receive information about the euro and the changeover?

	On television	On the Internet	In banks	On the radio	In newspapers, magazines	In schools and other places of education and training	In your letter box	In public places	In the workplace	In supermarkets and shops	Don't know
NMS 7	70%	56%	48%	47%	44%	40%	35%	29%	25%	16%	1%
 BG	71%	50%	47%	40%	37%	27%	26%	24%	23%	15%	2%
 CZ	69%	68%	78%	56%	52%	53%	39%	40%	28%	14%	2%
 LV	76%	69%	48%	56%	54%	32%	46%	34%	28%	24%	0%
 LT	65%	52%	32%	38%	41%	19%	27%	20%	19%	14%	2%
 HU	61%	51%	41%	38%	32%	23%	34%	17%	21%	11%	1%
 PL	68%	58%	40%	45%	42%	41%	32%	28%	21%	11%	1%
 RO	78%	53%	53%	52%	49%	49%	42%	36%	34%	27%	1%

Highest percentage per country*Lowest percentage per country*

Highest percentage per item	Lowest percentage per item
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While the perceived usefulness of all 10 information sources has declined over the past six months at NMS7 level, the picture is more varied at individual country level. In three countries – Bulgaria, Hungary and Latvia – all 10 means of information are seen as being more useful now than they were six months earlier, while in three other Member States – Lithuania, Poland and Romania – the opposite trend can be observed. The Czech Republic is the only country where the results were broadly the same as in November 2011.

In Bulgaria the perceived usefulness of all 10 information sources actually increased, with the radio (40%, +9 points), schools (27%, +8 points) and banks (47%, +8 points) experiencing the largest rises since November 2011.

The results for the Czech Republic were broadly in line with those obtained six months earlier, with slight increases and decreases in the various categories. The perceived usefulness of providing information about the euro in the workplace (28%, +3 points) increased, for example, while the perceived usefulness of providing information in newspapers and magazines declined (52%, -3 points).

As with Bulgaria, respondents in Latvia find all 10 sources of information more useful than they did in November 2011, with the most substantial rises coming in the cases of public places (34%, +8 points) and banks (48%, +7 points).

However, this picture is reversed for Lithuania, where all 10 sources of information are deemed less useful than they were six months earlier. The largest falls in perceived usefulness applied to information received via one's letterbox (27%, -7 points) and in banks (32%, -6 points).

In Hungary the results swing back the other way, with all 10 sources of information perceived to be more useful than they were in November 2011. Schools (23%, +8 points) and banks (41%, +5 points) witnessed the largest rises in perceived usefulness as sources of information.




Respondents in Poland mirror those in Lithuania as regarding all 10 sources of information as less useful than they did six months earlier. Receiving information in public places (28%, -10 points) and in newspapers or magazine (42%, -9 points) fell the most.

Romania is the third country in which all 10 means of providing information are seen as less useful now than they were in November 2011. In particular, banks (53%, -10 points) and the workplace (34%, -7 points) are seen as being less useful than they were previously.

The socio-demographic data show that:

- There are only minor gender variations on this question.
- Younger respondents think it would be useful to receive information in some contexts, such as banks, supermarkets, schools, and the internet. Older respondents favour the television as a means of providing information about the euro.
- Respondents with a higher level of education are much more likely to think it is useful to receive information in schools, in newspapers or magazines, and on the internet, than those who left school at 15 or younger.
- Employees and self-employed respondents are much more likely than manual workers and people who are not working to say they think it would be useful to receive information over the internet.
- Individuals who have already seen and used euro banknotes and coins are more likely to think that it would be useful to receive information about the euro from all the sources of information considered, apart from receiving information through their letterbox.

Q9 Where would it be most useful for you to receive information about the euro and the changeover? (ROTATE - MULTIPLE ANSWERS POSSIBLE)

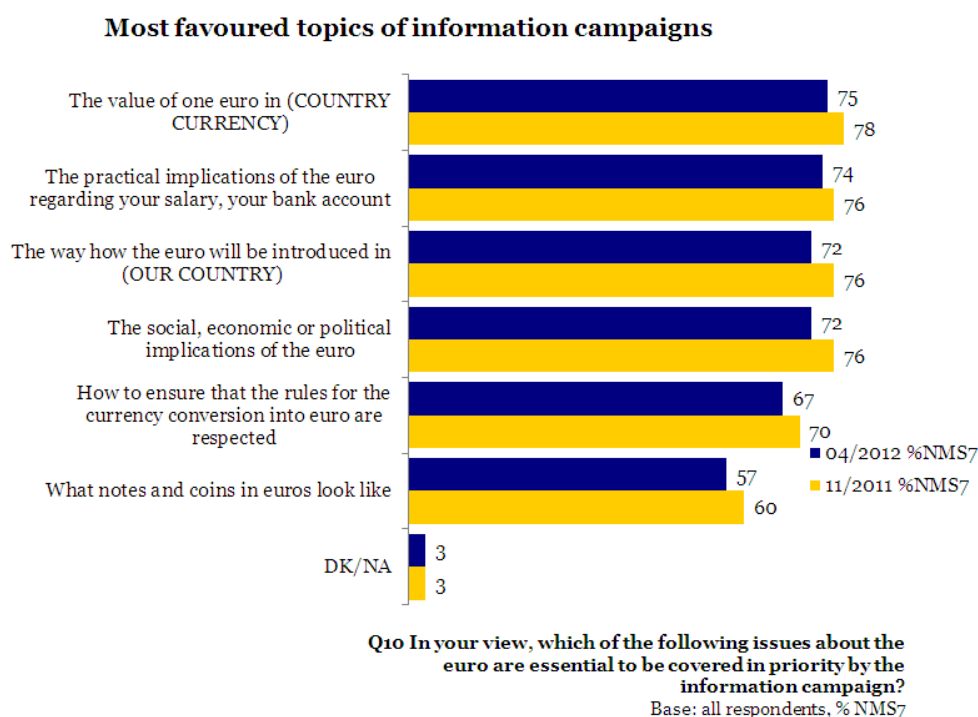
	On television	On the Internet	In banks	On the radio	In newspapers, magazines	In schools and other places of education and training	In your letter box	In public places	In the workplace	In supermarkets and shops	DK/NA
NMS7	70%	56%	48%	47%	44%	40%	35%	29%	25%	16%	1%
 Age											
15-24	68%	70%	52%	44%	44%	55%	31%	35%	37%	20%	0%
25-39	70%	67%	51%	48%	43%	45%	39%	37%	29%	18%	0%
40-54	71%	58%	47%	49%	45%	37%	35%	27%	26%	15%	1%
55 +	71%	39%	44%	45%	42%	31%	34%	21%	15%	13%	2%
 Education (End of)											
15-	73%	31%	44%	45%	37%	27%	37%	26%	20%	19%	2%
16-19	72%	50%	47%	46%	41%	36%	37%	26%	23%	16%	1%
20+	70%	62%	48%	48%	46%	41%	34%	32%	24%	15%	1%
Still studying	65%	69%	54%	42%	44%	59%	34%	36%	39%	19%	0%
 Respondent occupation scale											
Self-employed	72%	67%	46%	51%	48%	40%	30%	34%	21%	15%	1%
Employee	72%	68%	49%	51%	47%	42%	35%	34%	30%	17%	1%
Manual workers	69%	54%	54%	44%	42%	44%	36%	32%	30%	17%	1%
Not working	69%	49%	46%	44%	42%	39%	36%	26%	22%	15%	2%
Already seen euro banknotes											
Yes	71%	58%	49%	47%	45%	42%	35%	30%	26%	17%	1%
No	64%	42%	39%	41%	35%	29%	36%	24%	21%	12%	3%
Already seen euro coins											
Yes	71%	60%	49%	48%	45%	42%	35%	31%	27%	17%	1%
No	66%	38%	41%	42%	36%	32%	36%	23%	18%	13%	2%
Used euro banknotes											
Yes	72%	62%	51%	49%	47%	44%	35%	32%	27%	17%	1%
No	70%	47%	45%	42%	38%	37%	35%	26%	22%	15%	1%
Used euro coins											
Yes	71%	64%	50%	49%	47%	44%	35%	32%	27%	16%	1%
No	72%	52%	47%	44%	41%	38%	35%	28%	25%	17%	1%

2.4. Most favoured topics of information campaigns

- All six possible aspects of the information campaign are seen as less important than they were in November 2011 -

NMS7 respondents were next asked which issues they felt ought to be prioritised by the information campaign about the euro²¹. As in previous wave of the survey, a majority of respondents feel that all six issues under consideration ought to be covered. However, support for all six issues has declined since November 2011.

Three quarters (75%, -3 points) of respondents think the value of one euro in their country's currency should be included in the information campaign. Just under three quarters also think the way the euro will be introduced should be included (72%, -4 points); that the practical implications of joining the euro regarding their salary and bank account (74%, -2 points) should be included; and that the social, economic or political implications of the euro (72%, -4 points) should be included. Two thirds of respondents (67%, -3 points) think it is important to ensure that the rules for currency conversion are respected and over half (57%, -3 points) think it is important to cover what notes and coins look like.










²¹ Q10: In your view, which of the following issues about the euro are essential to be covered in priority by the information campaign? (ROTATE - MULTIPLE ANSWERS POSSIBLE). The way/how the euro will be introduced in (OUR COUNTRY); the value of one euro in (COUNTRY CURRENCY); what notes and coins in euros look like; how to ensure that the rules for the currency conversion into euro are respected; the practical implications of the euro regarding your salary, your bank account; the social, economic or political implications of the euro; don't know/no answer.

The order of priority in which the issues are placed varies from country to country. The way in which the euro will be introduced is emphasised by the largest proportion of respondents in Lithuania (62%) and the social, economic or political implications of the euro is considered the most important issue in the Czech Republic (89%). The practical implications of joining the euro are given the highest priority in two countries: Poland (73%) and Latvia (75%). And covering the value of one euro in their own currency is given the highest priority in three countries: Romania (83%), Bulgaria (71%) and Hungary (70%).

The level of support for these issues in general also varies according to the Member State. In the Czech Republic support for prioritising particular issues ranges from 89% (the social, economic or political implications of the euro) to 72% (what notes and coins look like). But in Hungary, the level of support ranges from 70% (the value of one euro) to 53% (what notes and coins look like).

Q10 In your view, which of the following issues about the euro are essential to be covered in priority by the information campaign?

	The value of one euro in (COUNTRY CURRENCY)	The practical implications of the euro regarding your salary, your bank account	The way how the euro will be introduced in (OUR COUNTRY)	The social, economic or political implications of the euro	How to ensure that the rules for the currency conversion into euro are respected	What notes and coins in euros look like	Don't know
NMS 7	75%	74%	72%	72%	67%	57%	3%
 BG	71%	67%	69%	68%	64%	54%	5%
 CZ	88%	86%	88%	89%	84%	72%	2%
 LV	70%	75%	74%	69%	71%	61%	4%
 LT	55%	61%	62%	61%	59%	28%	5%
 HU	70%	66%	64%	61%	53%	53%	3%
 PL	71%	73%	66%	71%	60%	49%	3%
 RO	83%	77%	81%	74%	80%	70%	3%
Highest percentage per country				<i>Lowest percentage per country</i>			
Highest percentage per item				Lowest percentage per item			

Again, the trend analysis shows that the last six months have had a very different impact on public opinion according to the country in question. In Bulgaria, more people think that all six issues should be prioritised than said so in November 2011. In some cases the increases were substantial, such as on the issues of knowing the value of one euro (71%, +14 points), how the euro will be introduced (69%, +13 points) and how to ensure that rules for currency conversion are respected (64%, +13 points).

In the Czech Republic, there were only minor variations. The largest change is related to the issue of ensuring that the rules for currency conversion are respected (84%, -3 points).

Latvia also experienced some minor increases and decreases, with the largest swing concerning the issue of whether to prioritise what euro notes and coins look like (61%, +5 points).

In Lithuania, support for prioritising all six issues declined. Support for giving priority to ensuring that the rules for currency conversion are respected suffered the largest fall (59%, -13 points), followed by prioritising the way in which the euro will be introduced (62%, -10 points).

In Hungary support for prioritising four out of the six issues increased, most substantially in the case of prioritising the way in which the euro will be introduced (64%, +7 points).

Support for covering all six aspects of euro accession declined in Poland. It fell most significantly in the cases of prioritising the way in which the euro will be introduced (66%, -11 points), of covering the value of one euro (71%, -9 points), of covering the social, economic and political implications of the euro (71%, -9 points) and of what notes and coins in euros look like (49%, -9 points).

In Romania the results remained broadly the same as in November 2011, with some slight increases and decreases. The largest change is related to the issue of covering what euro notes and coins look like (70%, -3 points).

The socio-demographic data show that:

- A higher proportion of women than men think that all six issues should be covered by the information campaign.
- Respondents with a higher level of education are much more likely to emphasize covering the way the euro will be introduced, ensuring that the rules for currency conversion are respected, the practical implications of joining the euro, and also the social, economic or political implications.
- Employees are the most likely to put the emphasis on giving priority to ensuring that the rules for currency conversion are respected, the practical implications of joining the euro, and the social, economic or political implications. Manual workers are the most likely to prioritize what notes and coins in euros look like.

Q10 In your view, which of the following issues about the euro are essential to be covered in priority by the information campaign?
(ROTATE - MULTIPLE ANSWERS POSSIBLE)

	The value of one euro in (COUNTRY CURRENCY)	The practical implications of the euro regarding your salary, your bank account	The way how the euro will be introduced in (OUR COUNTRY)	The social, economic or political implications of the euro	How to ensure that the rules for the currency conversion into euro are respected	What notes and coins in euros look like	DK/NA
NMS7	75%	74%	72%	72%	67%	57%	3%
Sex							
Male	73%	71%	71%	71%	66%	54%	3%
Female	77%	76%	73%	74%	68%	60%	3%
Education (End of)							
15-	76%	59%	64%	59%	60%	59%	5%
16-19	75%	72%	72%	69%	67%	59%	4%
20+	75%	76%	73%	76%	68%	55%	3%
Still studying	74%	79%	76%	77%	71%	57%	0%
Respondent occupation scale							
Self-employed	73%	70%	71%	74%	69%	54%	2%
Employee	77%	82%	76%	79%	73%	57%	2%
Manual workers	77%	77%	73%	70%	68%	60%	3%
Not working	74%	69%	70%	69%	63%	57%	4%

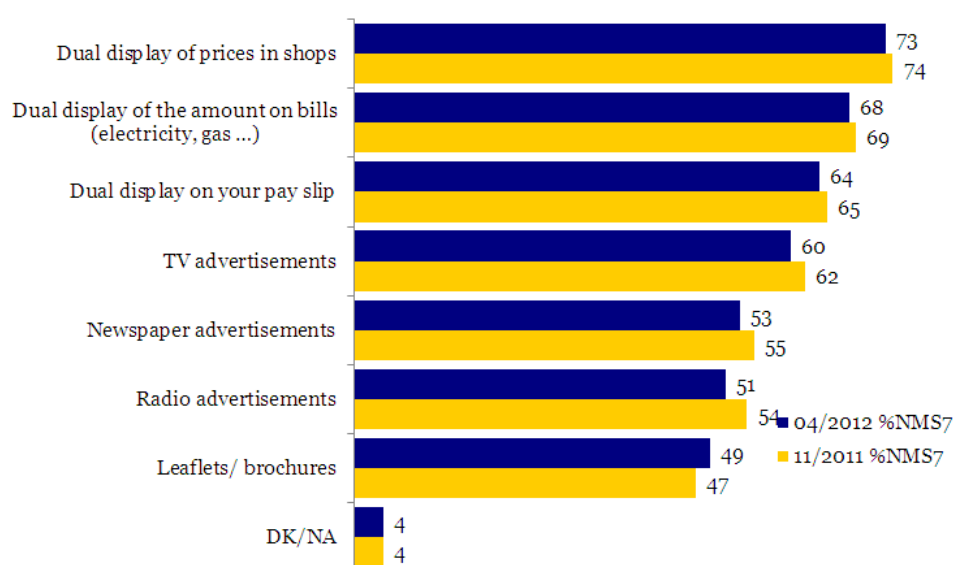
2.5. Main activities and events essential to be included in an information campaign

- A majority of people think that six out of seven activities and events are essential for the information campaign –

All NMS7 respondents were asked about the main activities and events which, in their view, are essential for an information campaign²². An absolute majority of respondents feel that six out of the seven activities under discussion – the exception being leaflets/brochures – ought to be included. However, leaflets/brochures are the only aspect of the information campaign whose support has increased over the last six months.

Almost three quarters of respondents (73%, -1 point) think the dual display of prices in shops is essential. Over two thirds of respondents (68%, -1 point) think the dual display of the amount on bills is essential. More than six people in 10 think that dual display on your pay slip should be included (64%, -1 point), and that TV advertisement should be included (60%, -2 points). Over half think that newspaper advertisements are essential (53%, -2 points), and that radio advertisements are essential (51%, -3 points). Just under half of all respondents think that leaflets and brochures should be included (49%, +2 points).

Main activities and events essential to be included in an information campaign










Q11 Here is a list of various information campaign actions. Could you tell me for each of them whether you would find it essential?

Base: all respondents, % NMS7

²² Q11: Here is a list of various information campaign actions. Could you tell me for each of them whether you would find it essential? (ROTATE - MULTIPLE ANSWERS POSSIBLE). Dual display of prices in shops; dual display of the amount on bills (electricity, gas ...); dual display on your pay slip; leaflets/ brochures; TV advertisements; radio advertisements; newspaper advertisements; don't know/no answer.

In all NMS7 countries, the dual display of prices in shops is most often regarded as an essential aspect of the information campaign, with results ranging from 87% who think so in Latvia to 61% in Poland. Dual display of the totals on bills is regarded as the second most important aspect in six of the seven countries, the exception being Lithuania where more people (68% vs. 66%) think that TV advertisements are important. Support for including this issue ranges from 81% in Latvia and Romania to 57% in Poland.

Q11 Here is a list of various information campaign actions. Could you tell me for each of them whether you would find it essential?

	Dual display of prices in shops	Dual display of the amount on bills (electricity, gas ...)	Dual display on your pay slip	TV advertisements	Newspaper advertisements	Radio advertisements	Leaflets/ brochures	Don't know
NMS 7	73%	68%	64%	60%	53%	51%	49%	4%
 BG	70%	65%	64%	57%	42%	44%	40%	5%
 CZ	80%	74%	64%	52%	52%	44%	49%	4%
 LV	87%	81%	75%	58%	47%	51%	46%	3%
 LT	77%	66%	54%	68%	56%	52%	27%	4%
 HU	81%	75%	71%	51%	29%	33%	26%	2%
 PL	61%	57%	55%	55%	55%	52%	49%	6%
 RO	85%	81%	78%	77%	66%	66%	65%	2%

Highest percentage per country

Lowest percentage per country

Highest percentage per item

Lowest percentage per item

As with the previous questions, the trend analysis shows that the last six months have had a varying impact from country to country. In Bulgaria, more people think that all seven information campaign actions are essential than felt so in November 2011. In some cases the increases were relatively substantial, notably having a dual display on your pay slip (64%, +10 points) and radio advertisements (44%, +9 points).

In the Czech Republic, there were once again only minor variations. The largest decrease is related to the issue of whether having a dual display on your pay slip is essential to the information campaign (64%, -3 points).

In Latvia, more people think that six information campaign actions are essential than said so six months earlier. The increases were fairly minor in most cases, with the notable exception of whether radio advertisements are essential (51%, +6 points).

The results in Lithuania were broadly similar to those obtained in November 2011, though fewer people now think that including TV advertisements is essential to the information campaign (68%, -5 points).

In Hungary support for prioritising five out of the seven campaign actions increased, most substantially in the case of including leaflets and brochures (26%, +5 points). But there was a slight fall in support for including radio advertisements (33%, -2 points).

Support for including all seven campaign actions fell in Poland. It fell most significantly in the cases of including dual price displays in shops (61%, -8 points), of including TV (55%, -8 points) and radio advertisements (52%, -8 points).

In Romania more respondents think that all seven information campaign actions are essential than felt six months earlier. The increases were only slight in most cases, though, with the largest rise relating to the inclusion of dual pricing displays in shops (85%, +4 points).

According to the socio-demographic data:

- A higher proportion of women than men think that most of the activities under discussion should be included in the information campaign, notably leaflets/brochures (52% vs. 45%) and dual displays on pay slips (67% vs. 61%).
- People in the 25-39 age group are the most likely to think that the dual display of prices in shops, on pay slips, and amounts on bills are essential.
- Employees are the most likely to think that the dual display of prices in shops, the dual display of the amount on bills, and dual display on your pay slip are essential.
- Respondents who are in favour of joining the euro are more likely to regard TV advertisements (65% vs. 55%), radio advertisements (55% vs. 48%) and newspaper advertisements (57% vs. 50%) as essential.

Q11 Here is a list of various information campaign actions. Could you tell me for each of them whether you would find it essential?
(ROTATE - MULTIPLE ANSWERS POSSIBLE)

	Dual display of prices in shops	Dual display of the amount on bills (electricity, gas ...)	Dual display on your pay slip	TV advertisements	Newspaper advertisements	Radio advertisements	Leaflets/ brochures	DK/NA
NMS7	73%	68%	64%	60%	53%	51%	49%	4%
Sex								
Male	73%	66%	61%	59%	53%	50%	45%	4%
Female	73%	70%	67%	60%	53%	52%	52%	4%
Age								
15-24	69%	65%	64%	62%	57%	48%	50%	4%
25-39	76%	72%	68%	62%	55%	55%	54%	3%
40-54	72%	67%	65%	60%	53%	52%	48%	4%
55 +	72%	66%	60%	58%	50%	50%	44%	5%
Respondent occupation scale								
Self-employed	74%	66%	57%	60%	56%	55%	51%	4%
Employee	80%	72%	69%	62%	56%	55%	53%	3%
Manual workers	69%	70%	68%	57%	52%	50%	47%	4%
Not working	70%	66%	62%	59%	51%	50%	46%	5%
Attitude towards the introduction of the euro in the country								
Total 'In favour'	74%	69%	65%	65%	57%	55%	50%	3%
Total 'Against'	71%	67%	63%	55%	50%	48%	47%	5%

III. THE EURO: PERCEPTIONS AND SUPPORT FOR ITS INTRODUCTION

1. CONSEQUENCES OF THE EURO'S INTRODUCTION

1.1. Consequences at a national level

- A majority of respondents think that introducing the euro would have negative consequences for their country –

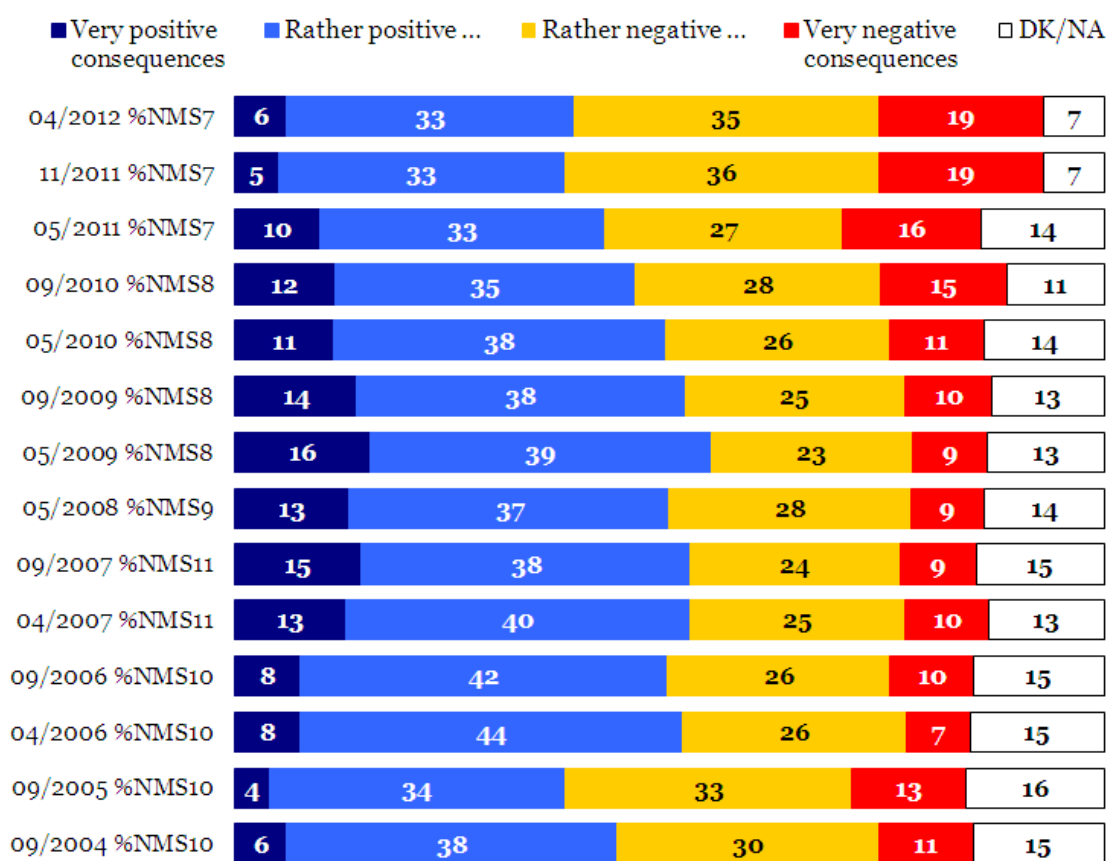
All NMS7 respondents were asked whether they think the introduction of the euro would have positive or negative consequences for their country²³. A majority (54%) think the consequences would be negative, with 19% saying they would be very negative and 35% saying they would be rather negative. However, 39% of respondents think the consequences for their country would be positive, with 6% thinking they would be very positive and 33% expecting them to be rather positive.

Respondents' expectations of the consequences of introducing the euro have improved only very slightly since November 2011, when 55% thought the consequences would be negative. However, the perception remains far worse than it did in May 2011, when equal numbers (43%) of people thought the consequences would be positive and negative.

The latest results are important in that they do not mark a further deterioration in public perception on the consequences of joining the euro. In the five surveys up to and including November 2011, the proportion of respondents who said the consequences of joining the euro would be positive fell by 17 points. So while the increase witnessed in this wave is only small, it is the first increase recorded since May 2009.

²³ Q13.1: Do you think the introduction of the euro would have positive or negative consequences for [OUR COUNTRY]? Very positive consequences; rather positive consequences; rather negative consequences; very negative consequences; don't know/no answer.

Consequences of the introduction of the euro at a national level



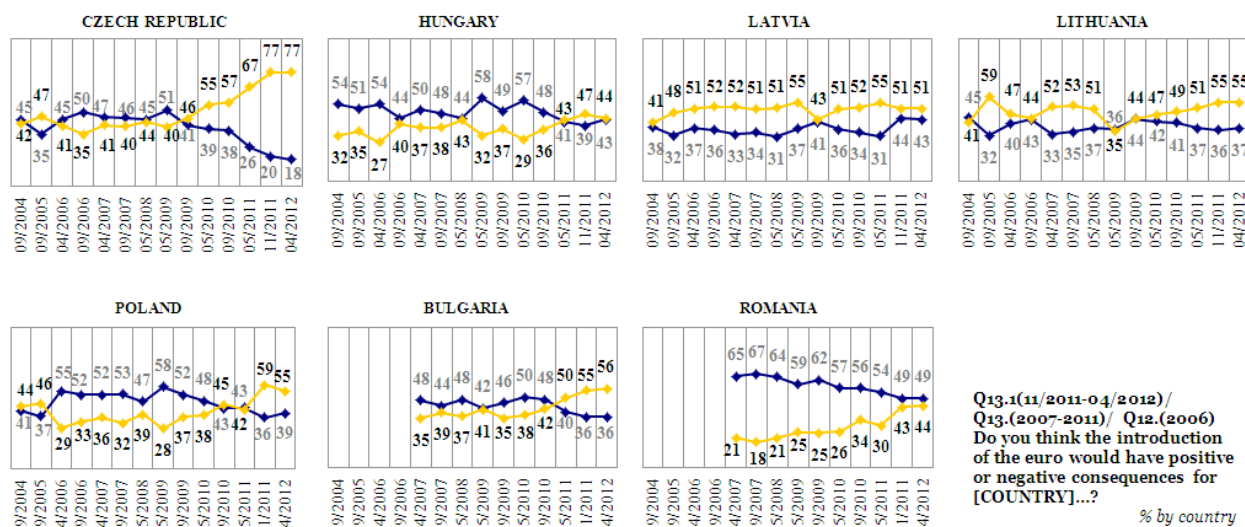
Q13.1(11/2011)/Q13.(2007-2011)/Q12(2006). Do you think the introduction of the euro would have positive or negative consequences for [COUNTRY]...?

As in previous waves of the survey, Romania is the only NMS7 country in which a higher proportion of respondents think the introduction of the euro would have positive consequences for their country, by 49% to 44%. People in the Czech Republic are the most likely to think that the introduction of the euro would have negative consequences: 77% say this, with only 18% saying it would be positive. In Poland 55% say the consequences would be negative, and 39% say they would be positive. In Bulgaria 56% see the consequences as negative, while 36% see them as positive, with a very similar result in Lithuania (55% vs. 37%). A majority (51%) of people in Latvia also think the consequences would be negative, while 43% think they would be positive. And under half (44%) of respondents in Hungary think the consequences would be negative, as opposed to 43% who think they would be positive.

The country-level results have changed very little on this question since November 2011. The largest changes occurred in Poland (55% negative, -4 points; 39% positive, +3 points), and in Hungary (44% negative, -3 points; 43% positive, +4 points). In Hungary, the proportion of respondents who think the consequences of introducing the euro would be positive is close to overtaking the proportion who think it would be negative.

Consequences of the introduction of the euro at a national level, %

■ % very and rather positive ■ % very and rather negative



The socio-demographic data reveals that:

- Men (45%) are more likely to think the euro will have positive consequences for their country than women (33%).
- Younger respondents are more likely to say the euro will have positive consequences for their country, while older respondents are more likely to say they don't know what the consequences would be.
- Employees (41%) are the most likely to say the euro would have positive consequences, while manual workers (34%) are the least likely.
- Over two thirds (70%) of respondents who think the euro is positive in countries already using it also think it would be positive for their country. But a quarter (26%) of those who think the euro is positive in countries already using it feel it would be negative for their own country.
- Over four fifths (81%) of people who think the euro would be positive for them personally think it would also be positive for their country.
- While 72% of people who are in favour of joining the euro think it would be positive for their country, a fifth (21%) of those in favour think the euro would have negative consequences for their country.

Q13.1 Do you think the introduction of the euro would have positive or negative consequences for...?

[OUR COUNTRY]

	Total 'Positive consequences'	Total 'Negative consequences'	DK/NA
NMS7	39%	54%	7%



Sex

Male	45%	48%	7%
Female	33%	59%	8%



Age

15-24	48%	50%	2%
25-39	37%	59%	4%
40-54	37%	54%	9%
55 +	38%	52%	10%



Respondent occupation scale

Self-employed	36%	58%	6%
Employee	41%	52%	7%
Manual workers	34%	59%	7%
Not working	39%	53%	8%

Consequences in countries already using it

Total 'Positive'	70%	26%	4%
Total 'Negative'	9%	86%	5%

Expected personal consequences of the euro

Total 'Positive'	81%	14%	5%
Total 'Negative'	8%	89%	3%

Attitude towards the introduction of the euro in the country

Total 'In favour'	72%	21%	7%
Total 'Against'	8%	87%	5%

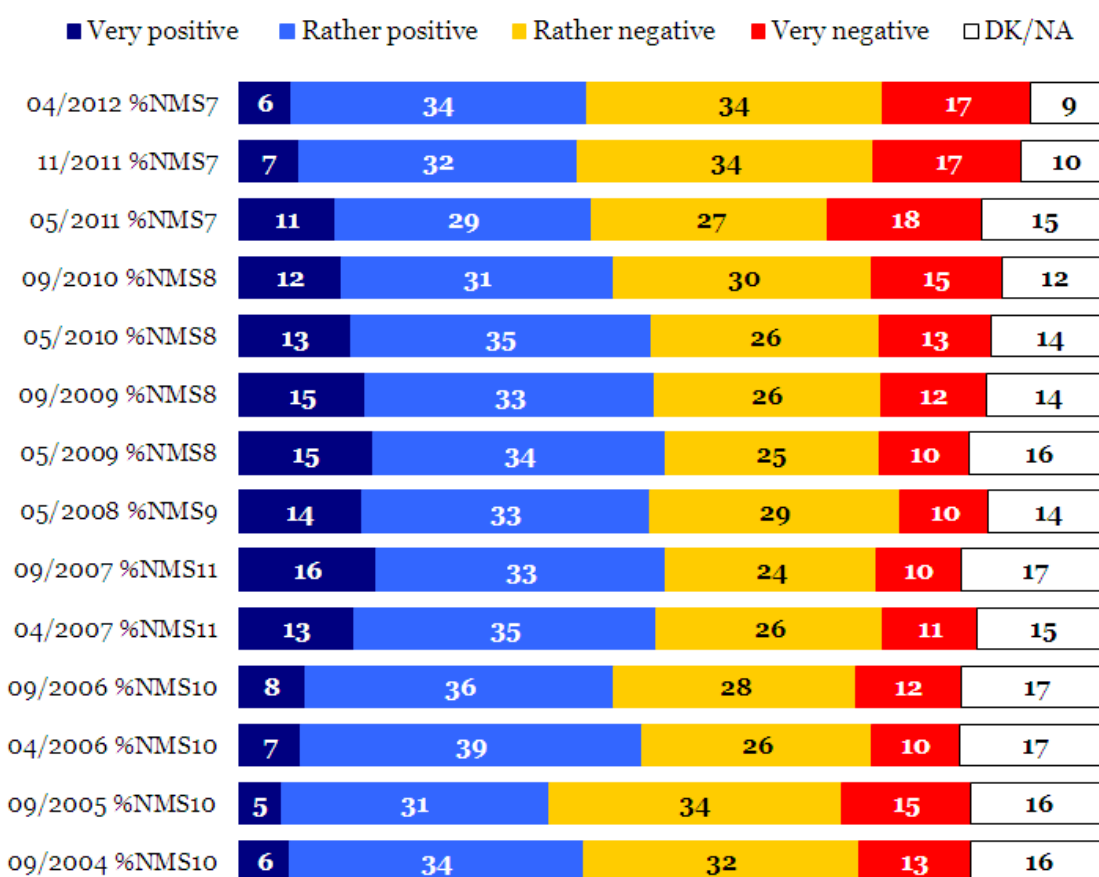
1.2. Personal consequences of the euro's introduction

- A majority of respondents think that introducing the euro would have negative consequences for them personally -

All NMS7 respondents were asked whether they think the introduction of the euro would have positive or negative consequences for them personally²⁴. A majority (51%) think the consequences would be negative, with 17% saying they would be very negative and 34% saying they would be rather negative. By contrast, 40% think the consequences for them would be positive, with 6% thinking they would be very positive and 34% thinking they would be rather positive. One in ten (9%) say they do not know.

People's expectations of the personal consequences of introducing the euro have remained steady since November 2011. Then, 51% of respondents thought the consequences would be negative, and 39% thought they would be positive. However, it is the first time since May 2009 that the proportion of respondents who think the euro's introduction would have positive consequences for them personally has risen.

Consequences of the introduction of the euro at a personal level



Q13.2 (11/2011)/Q14.(2007-2011)/Q13.(2006) And for you personally, do you think that it would be positive or negative if the euro would be introduced?

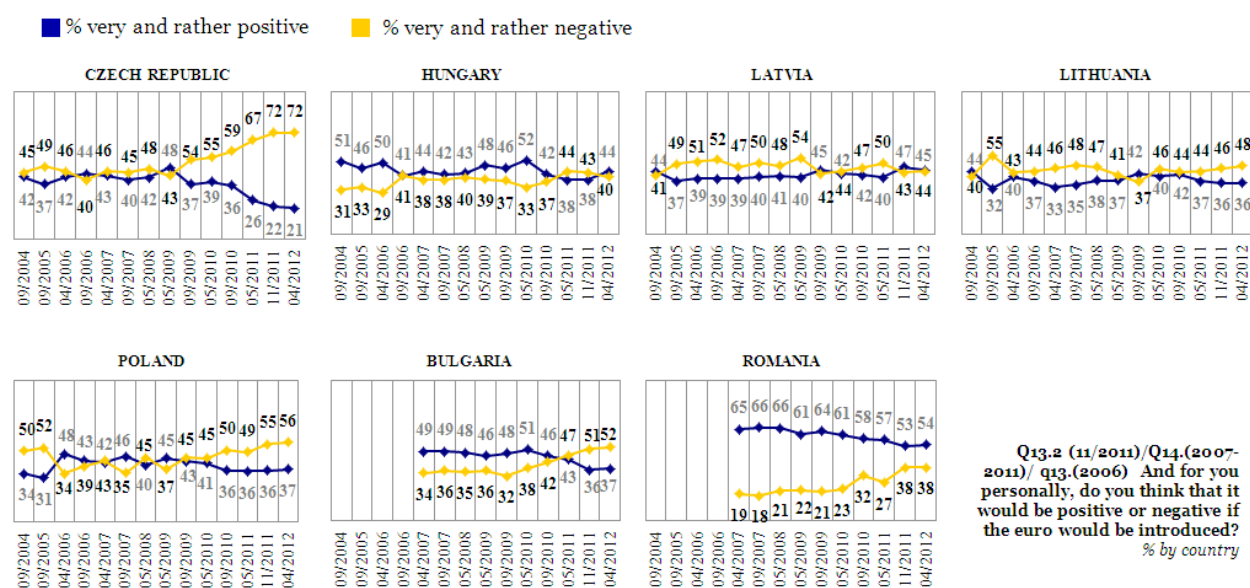
²⁴ Q13.2: Do you think the introduction of the euro would have positive or negative consequences for you personally? Very positive consequences; rather positive consequences; rather negative consequences; very negative consequences; don't know/no answer.

In Romania, Hungary and Latvia a higher proportion of respondents think that the introduction of the euro would have positive consequences for them personally: this marks a change from the previous wave, when this was true only for Romania and Latvia. In Romania 54% think the consequences would be positive, and 38% think they would be negative. In Latvia 45% think the consequences would be positive, and 44% think they would be negative. And 44% of respondents in Hungary think the consequences would be positive, as opposed to 40% who think they would be negative.

People in the Czech Republic are the most likely to think that the introduction of the euro would have negative consequences for them personally: 72% say this, with only 21% saying they would be positive. In Poland 56% say the consequences would be negative, and 37% say they would be positive. In Bulgaria 52% think the consequences would be negative, while 37% see them as being positive.

Public opinion has changed only slightly in most countries on this question since November 2011. The largest swing occurred in Hungary (44% positive, +6 points; 40% negative, -3 points), where the proportion of people who envisage positive consequence overtook the proportion who envisage negative personal consequences.

Consequences of the introduction of the euro at a personal level, %



The socio-demographic data reveals that:

- Men (46%) are more likely to think the euro will have positive consequences for them personally than women (35%).
- Younger respondents are more likely to say the euro will have positive consequences for them personally, while older respondents are more likely to say they would be negative or that they do not know what the consequences would be.

- Employees (45%) and self-employed people (44%) are the most likely to say the euro would have positive consequences for them personally, while manual workers (36%) and people who are not working (38%) are the least likely to say this.
- Over two thirds (68%) of respondents who think the euro is positive in countries already using it also think it would be positive for them personally. But a quarter (25%) of those who think the euro is positive in countries already using it think it would be negative for them personally.
- Over four fifths (84%) of respondents who think the euro would be positive for their country think it would also be positive for them personally.
- 73% of people who are in favour of joining the euro think it would be positive for them personally; but 18% of those in favour think the euro would have negative consequences for them.

Q13.2 Do you think the introduction of the euro would have positive or negative consequences for...?

For you personally

	Total 'Positive consequences'	Total 'Negative consequences'	DK/NA
NMS7	40%	51%	9%



Sex

Male	46%	46%	8%
Female	35%	56%	9%



Age

15-24	51%	43%	6%
25-39	41%	53%	6%
40-54	41%	51%	8%
55 +	33%	54%	13%



Respondent occupation scale

Self-employed	44%	52%	4%
Employee	45%	46%	9%
Manual workers	36%	58%	6%
Not working	38%	51%	11%

Consequences in countries already using it

Total 'Positive'	68%	25%	7%
Total 'Negative'	13%	81%	6%

Expected consequences of the euro for own country

Total 'Positive'	84%	9%	7%
Total 'Negative'	10%	85%	5%

Attitude towards the introduction of the euro in the country

Total 'In favour'	73%	18%	9%
Total 'Against'	9%	84%	7%

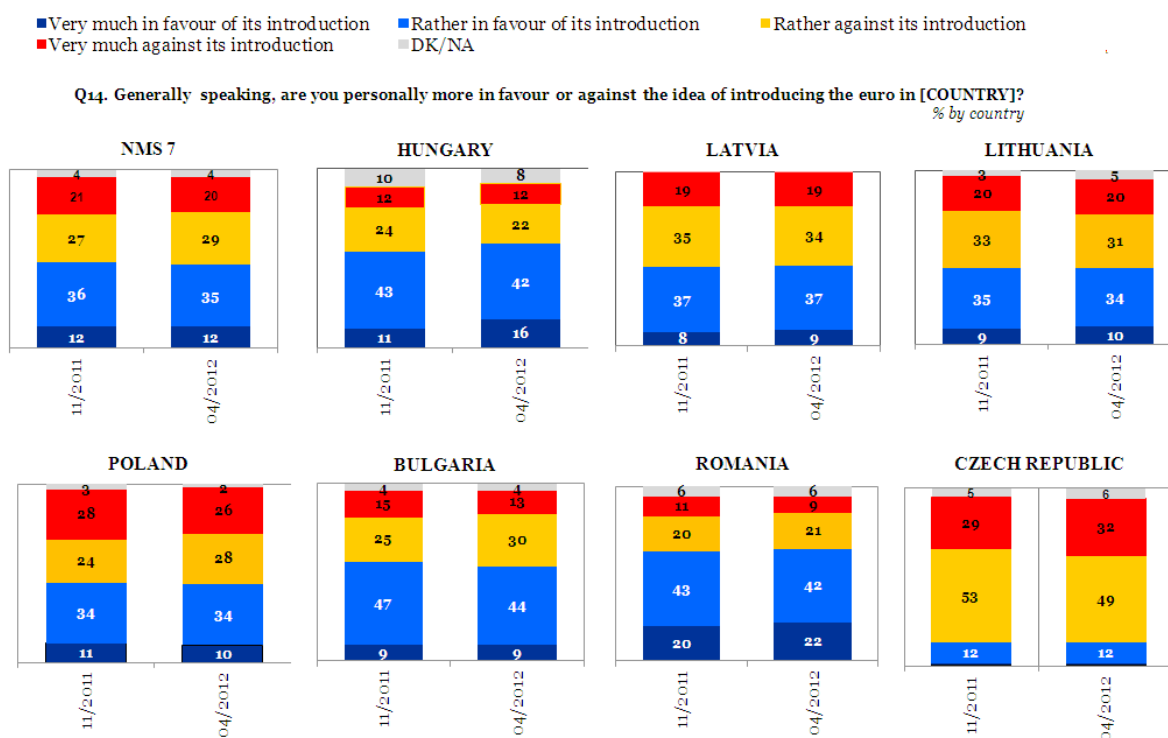
2. SUPPORT FOR THE SINGLE CURRENCY

2.1. Opinions within the respondents' social environment

- A relative majority of NMS7 respondents now opposes the introduction of the euro -

All NMS7 respondents were asked whether they are in favour of or against the idea of introducing the euro²⁵. Just under half (47%) are in favour of the euro being introduced, with 12% very much in favour and 35% rather in favour. A similar overall proportion of respondents (49%) is against the introduction of the euro, though more are very much against (20%) and fewer are only rather against (29%). This marks a very slight shift against joining the euro since November 2011, when 48% of respondents were in favour and 48% were against.

General support for the introduction of euro



As in the previous wave of the survey, a majority of respondents are in favour of introducing the euro in three countries: Romania, where 64% are in favour (22% very much in favour, 42% rather in favour); Bulgaria, where 53% are in favour (9% very, 44% rather); and Hungary, where 58% are in favour (16% very, 42% rather). A relatively high proportion of people in Hungary (8%) also say that they do not know whether they favour the introduction of the euro.

²⁵ Q14 Generally speaking, are you personally more in favour or against the idea of introducing the euro in (OUR COUNTRY)? Very much in favour of its introduction; rather in favour of its introduction; rather against its introduction; very much against its introduction; don't know/no answer.

In the other four countries, a majority of people are against introducing the euro. Opposition to joining is by far the highest in the Czech Republic, where 81% are against (32% very much against, 49% rather against). But smaller majorities also oppose the introduction of the euro in: Latvia, where 53% are against (19% very, 34% rather); Lithuania, where 51% are against (20% very, 31% rather); and Poland, where 54% are against (26% very, 28% rather).

The country-level results are very much in line with those obtained in November 2011, with just a couple of exceptions. The largest changes occurred in Hungary (58% in favour, +4 points) and Bulgaria (53% in favour, -3 points).

The socio-demographic data shows that:

- Men are more likely to be in favour of the introduction of the euro, by a margin of 54% to 41%.
- The 15-24 age group is the only one in which an absolute majority of respondents are in favour of introducing the euro: 53% are in favour.
- While 52% of people who live in large towns are in favour of the introduction of the euro, this opinion is shared by only 45% of those who live in rural villages.
- 48-49% of employees, self-employed people and those who are not working are in favour of the introduction of the euro, compared with 42% of manual workers.
- An equal share of the people who have seen euro coins are in favour of and against its introduction.
- A majority (53%) of people who feel informed about the euro are in favour of its introduction, whereas 44% of people who do not feel informed are in favour.
- Three quarters (75%) of those who think the euro has positive consequences for the countries already using it are in favour of joining, although 23% of people who think the euro has positive consequences for the countries already using it are against.
- Almost nine out of ten (87%) of respondents who think the euro would have positive consequences for their own country are in favour of joining, although 11% of those who think the euro would have positive consequences for their own country are still against joining.

Q14 Generally speaking, are you personally more in favour or against the idea of introducing the euro in (OUR COUNTRY)?

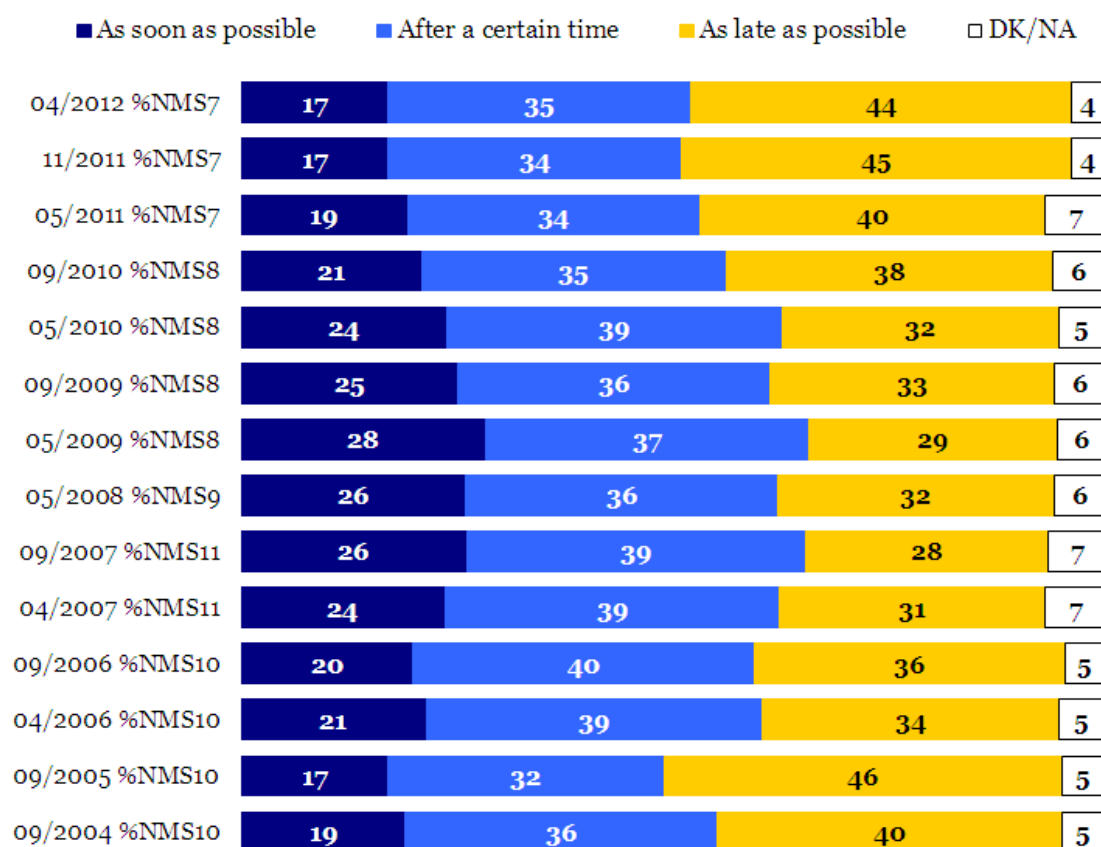
	Total 'In favour of its introduction'	Total 'Against its introduction'	DK/NA
NMS7	47%	49%	4%
Sex			
Male	54%	42%	4%
Female	41%	54%	5%
Age			
15-24	53%	46%	1%
25-39	45%	51%	4%
40-54	46%	50%	4%
55 +	48%	46%	6%
Subjective urbanisation			
Rural village	45%	51%	4%
Small/ Mid-size town	46%	50%	4%
Large town	52%	44%	4%
Respondent occupation scale			
Self-employed	48%	51%	1%
Employee	49%	47%	4%
Manual workers	42%	55%	3%
Not working	48%	47%	5%
Already seen euro banknotes			
Yes	49%	47%	4%
No	43%	52%	5%
Already seen euro coins			
Yes	48%	48%	4%
No	46%	48%	6%
Used euro banknotes			
Yes	49%	47%	4%
No	45%	50%	5%
Used euro coins			
Yes	49%	48%	3%
No	47%	48%	5%
Level of information about the euro			
Total 'Informed'	53%	44%	3%
Total 'Not informed'	44%	51%	5%
Consequences in countries already using it			
Total 'Positive'	75%	23%	2%
Total 'Negative'	19%	78%	3%
Expected consequences of the euro for own country			
Total 'Positive'	87%	11%	2%
Total 'Negative'	18%	78%	4%

2.2. The most desired timeframe for the adoption of the euro

- The proportion of respondents (44%) who would like the euro to be introduced as late as possible has fallen for the first time in several waves of the survey -

All NMS7 respondents were asked when they would like the euro to become their currency²⁶. Over four out of ten (44%) say they would like the euro to be introduced as late as possible. Over a third (35%) want to adopt the euro after a certain time. Just 17% would like to introduce the euro as soon as possible.

These results have changed only slightly since November 2011, when 45% of respondents said they would like the euro to be introduced as late as possible. However, the number of people giving this answer had previously been rising, going up from 32% in May 2010. So the most recent result, with only a small downward shift, is noteworthy in marking the end of this trend.



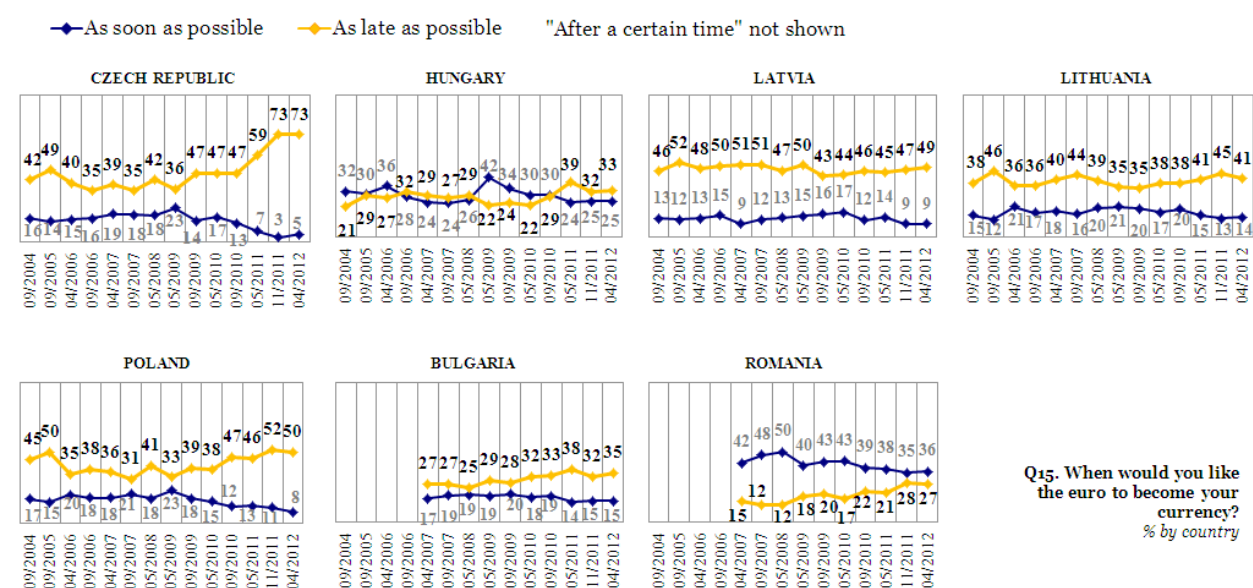
Q15. When would you like the euro to become your currency?

²⁶ Q15: When would you like the euro to become your currency? As soon as possible; after a certain time; as late as possible; don't know/no answer.

As in the previous wave, Romania is the only NMS7 country where more respondents would like to join the euro as soon as possible (36%) than would like to join as late as possible (27%). In the Czech Republic, a large majority (73%) would prefer to join as late as possible, with just 5% saying they want to join as soon as possible. Elsewhere the margin is less pronounced: Poland, 50% as late as possible compared, with 8% as soon as possible; Latvia, 49% vs. 9%; Lithuania, 41% vs. 14%; Bulgaria, 35% vs. 15%; and Hungary, 33% vs. 25%.

Most countries experienced only very minor changes compared with November 2011. The largest evolutions occurred in Lithuania (41% as late as possible, -4 points), Bulgaria (35% as late as possible, +3 points), and Poland (50% as late as possible, -2 points; 8% as soon as possible, -3 points).

Desired timeframe for adopting the euro, %




The socio-demographic data show that:


- Men are more likely than women to want to introduce the euro as soon as possible, by a margin of 22% to 12%. By contrast, women (50%) are more inclined than men (37%) to want to join as late as possible.
- While 44% of respondents aged 15-24 would like to join after a certain time, only 33-35% of people in the three older age brackets say this. By contrast, 44-46% of people aged 25 and over would like to join as late as possible, compared with 38% of 15-24 year-olds.
- People who left school aged 15 or under are the most likely to want to introduce the euro as soon as possible. Those who left education aged 20 or over are the most likely to favour joining after a certain time.
- A majority (51%) of manual workers want to join the euro as late as possible, but only 40% of employees say this.


- A majority of people who think the euro will have positive consequences both for their country (54%) and for themselves (53%) favour the idea of introducing the euro after a certain time.
- A majority (56%) of people who are in favour of the euro prefer the idea of introducing the euro after a certain time, with only 34% of those in favour of joining as soon as possible.


Q15 When would you like the euro to become your currency?

	As soon as possible	After a certain time	As late as possible	DK/NA
NMS7	17%	35%	44%	4%

 Sex				
Male	22%	37%	37%	4%
Female	12%	34%	50%	4%

 Age				
15-24	17%	44%	38%	1%
25-39	17%	35%	46%	2%
40-54	18%	34%	45%	3%
55 +	16%	33%	44%	7%

 Education (End of)				
15-	29%	21%	44%	6%
16-19	19%	33%	45%	3%
20+	14%	38%	44%	4%
Still studying	16%	46%	37%	1%

 Respondent occupation scale				
Self-employed	17%	32%	48%	3%
Employee	16%	41%	40%	3%
Manual workers	17%	30%	51%	2%
Not working	18%	35%	43%	4%

Expected consequences of the euro for own country				
Total 'Positive'	34%	54%	10%	2%
Total 'Negative'	5%	22%	70%	3%

Expected personal consequences of the euro				
Total 'Positive'	34%	53%	11%	2%
Total 'Negative'	5%	21%	71%	3%

Attitude towards the introduction of the euro in the country				
Total 'In favour'	34%	56%	8%	2%
Total 'Against'	1%	16%	80%	3%

IV. CONSEQUENCES OF ADOPTING THE EURO

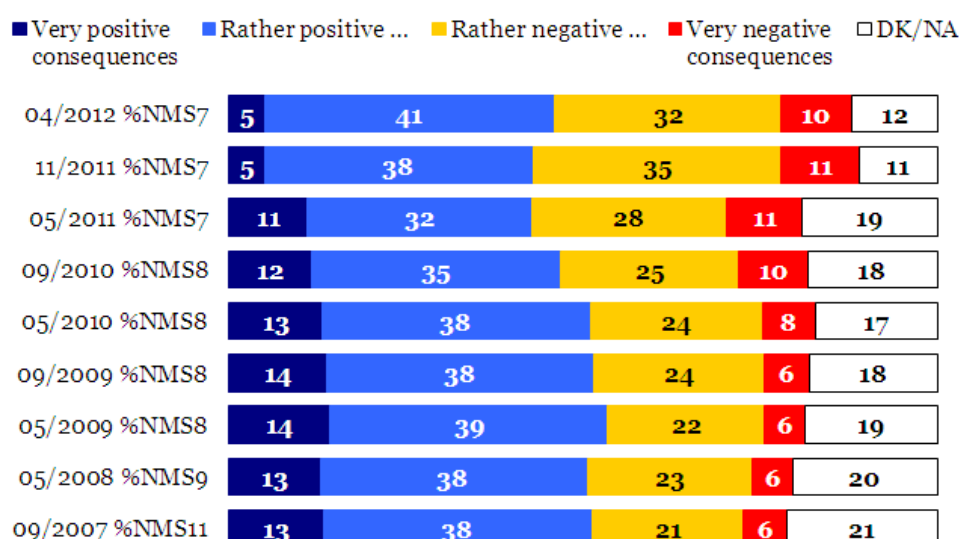
1. THE CONSEQUENCES IN GENERAL

- A relative majority of respondents in six of the seven countries now think that introducing the euro has had positive consequences for the countries already using the currency –**

All NMS7 respondents were asked whether they think the introduction of the euro has had positive or negative consequences in those countries that are using the euro already²⁷. A relative majority (46%) think the euro has had positive consequences, with 5% saying it has been very positive, and 41% saying it has been rather positive. Over four out of ten (42%) respondents think the euro has had a negative impact in those countries, with 10% saying it has been very negative, and 32% saying it has been rather negative. The remaining 12% of respondents say they don't know.

This marks an important turnaround on the November 2011 results. Then, a relative majority believed that the euro had had negative consequences. The number of people who think the consequences have been positive increased by 3 points, while the number who think the consequences have been negative declined by 4 points. The proportion of respondents who think the euro has had positive consequences is now at its highest level since September 2010 (though still some way below the 53% mark recorded in May 2009).

Consequences of the introduction of the euro in those countries already using the euro



Q12. Do you think the introduction of the euro has had positive or negative consequences in those countries that are using the euro already?

²⁷ Q12: Do you think the introduction of the euro has had positive or negative consequences in those countries that are using the euro already? Very positive consequences; rather positive consequences; rather negative consequences; very negative consequences; don't know/no answer.

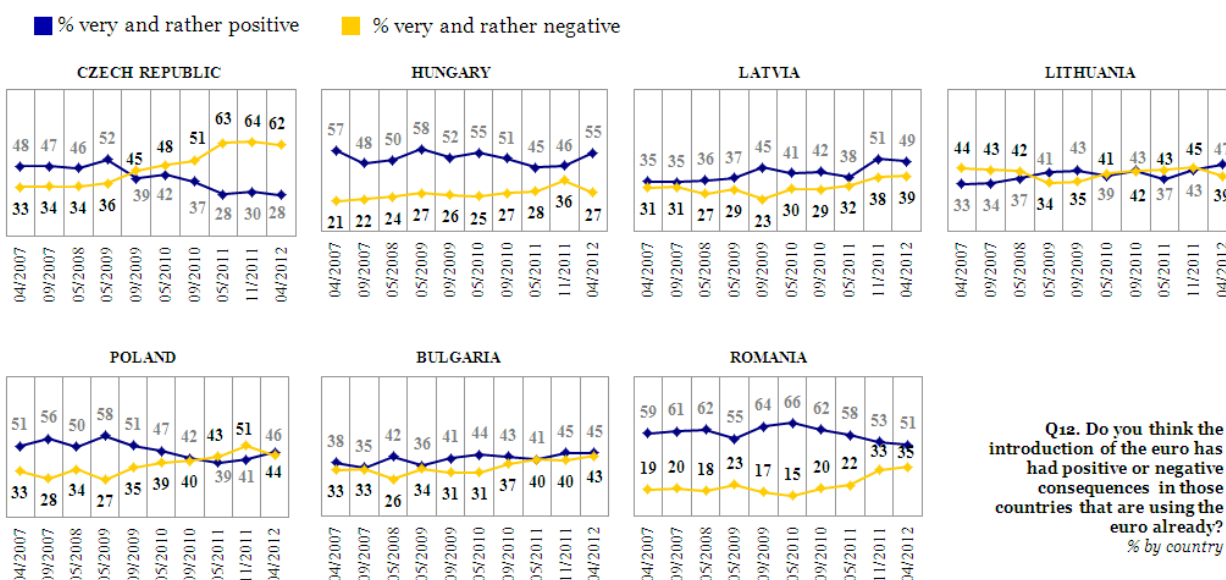
In four of the seven NMS7 Member States there is a relative majority of respondents who think that the euro has had positive consequences in those countries that are already using it: Latvia (49% positive, and 39% negative); Bulgaria (45% positive, and 43% negative); Lithuania (47% positive, and 39% negative); and Poland (46% positive, and 44% negative).

In two countries, an outstanding majority of respondents thinks that the euro has had positive consequences in countries already using it: Hungary, where 55% think the consequences have been positive, and 27% think they have been negative; Romania, 51% positive, and 35% negative.

However, in the Czech Republic the general public clearly hold the view that the euro has had negative consequences, with 62% of respondents saying this, and only 28% saying the consequences have been positive.

Since November 2011, three countries have experienced positive evolutions in terms of the number of people who think the euro has had positive consequences in the countries already using it: Hungary (55% positive, +9 points; 27% negative, -9 points); Lithuania (47% positive, +4 points; 39% negative, -6 points); and Poland (46% positive, +5 points; 44% negative, -7 points). However, the gap narrowed in favour of the euro having had negative consequences in Latvia (49% positive, -2 points; 39% negative, +1 point), Bulgaria (45% positive, no change; 43% negative, +3 points), and Romania (51% positive, -2 points; 35% negative, +2 points).

Consequences of the introduction of the euro in those countries already using the euro, %



According to the socio-demographic data:

- Men (50%) are more likely than women (42%) to think that the euro has had positive consequences.
- Younger respondents are more likely to think the euro has had positive consequences: while 65% of 15-24 year-olds say this, only 38% of over-55s say the same.
- 48% of manual workers and 47% of employees say the euro has had positive consequences, but only 41% of self-employed people say this.
- A majority (51%) of people who feel informed about the euro think that it has had positive consequences, as opposed to 43% of respondents who do not feel informed.
- 82% of people who think the euro will have positive consequences for their own country also think it has had positive consequences in the countries that use it already. Just 10% of those who think the euro will have positive consequences for their own country think it has had negative consequences in the countries that use it already.

Q12 Do you think the introduction of the euro has had positive or negative consequences in those countries that are using the euro already?

	Total 'Positive consequences'	Total 'Negative consequences'	DK/NA
NMS7	46%	42%	12%
Sex			
Male	50%	39%	11%
Female	42%	44%	14%
Age			
15-24	65%	29%	6%
25-39	46%	45%	9%
40-54	44%	43%	13%
55 +	38%	44%	18%
Respondent occupation scale			
Self-employed	41%	49%	10%
Employee	47%	41%	12%
Manual workers	48%	43%	9%
Not working	45%	41%	14%
Level of information about the euro			
Total 'Informed'	51%	39%	10%
Total 'Not informed'	43%	44%	13%
Expected consequences of the euro for own country			
Total 'Positive'	82%	10%	8%
Total 'Negative'	22%	67%	11%

2. POLITICAL AND ECONOMIC CONSEQUENCES OF INTRODUCING THE EURO

2.1. Will the changeover to the euro increase prices?

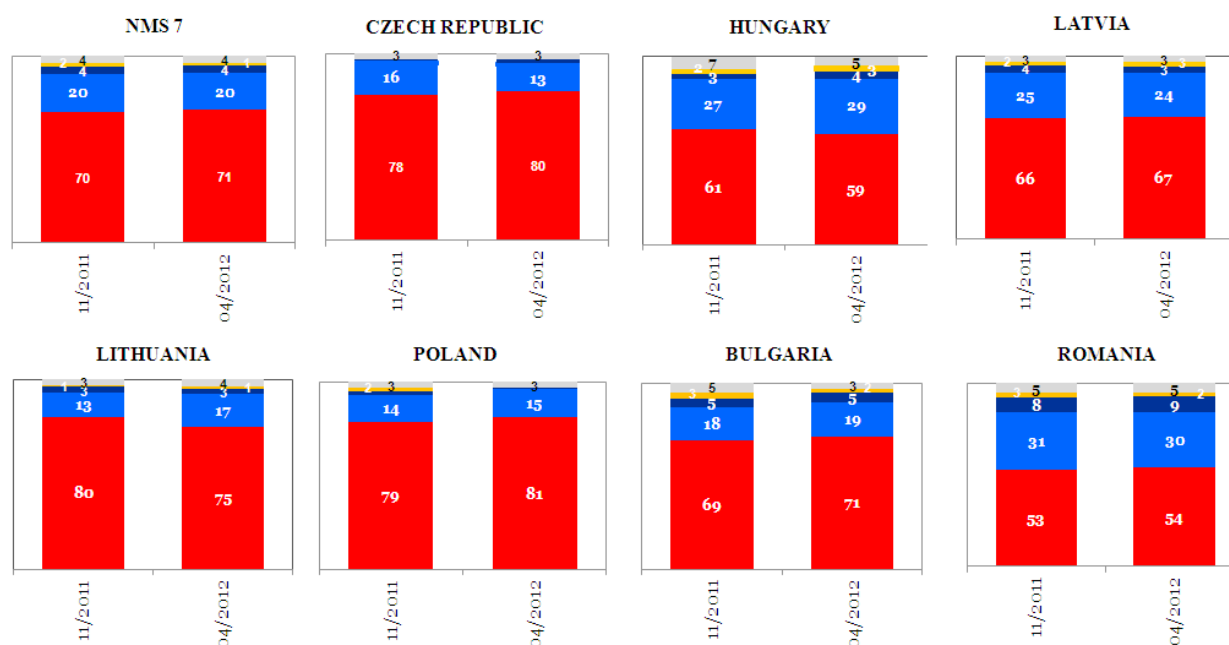
- Seven out of ten respondents think that introducing the euro would cause prices to rise -

All NMS7 respondents were asked what impact, if any, the introduction of the euro will have on prices in their country²⁸. Seven out of ten (71%) respondents think the changeover will increase prices, while 20% think it will help keep prices stable. Just 4% think it will help reduce prices, with a further 2% saying spontaneously that it will have no impact. These results are almost identical to those obtained in November 2011, with the number of people saying the changeover will increase prices having increased marginally from 70%.

Will the changeover to the euro increase prices ?

■ Will increase prices ■ Will help keep prices stable ■ Will help reduce prices ■ No impact ■ DK/NA

Q16 What impact, if any, do you think the introduction of euro will have on prices in [OUR COUNTRY]?
% by country



²⁸ Q16: What impact, if any, do you think the introduction of the euro will have on prices in (OUR COUNTRY)? Will increase prices; will help keep prices stable; will help reduce prices; no impact (DO NOT READ OUT); don't know/no answer.





A majority of respondents in all seven countries thinks that introducing the euro will increase prices, ranging from the 81% who think so in Poland and the 80% who think so in the Czech Republic to the 54% who think so in Romania. Romania (30%) has the highest proportion of people who think the euro will help keep prices stable; the Czech Republic (13%) has the lowest.

The results are very similar to those gathered in the previous wave of the survey, with only Lithuania experiencing a substantial evolution (75% say it will increase prices, -5 points; 17% say it will keep prices stable, +4 points). In contrast, the proportion of respondents who think that introducing the euro will increase prices rose slightly in Bulgaria (+2 points), the Czech Republic (+2 points), Poland (+2 points) and Romania (+1 point).

The socio-demographic data show that:

- Women (74%) are more likely than men (68%) to think that introducing the euro will increase prices.
- Older respondents are more likely to say that introducing the euro will increase prices: 74% of people aged 55 and over expect this to happen, as opposed to 61% of people in the 15-24 age group.
- While three quarters (75%) of people who left education aged 20 or over think the euro will increase prices, only 63% of those who left school aged 15 or under feel the same way.
- 78% of self-employed people think that introducing the euro will increase prices, as opposed to just 68% of manual workers and 71% of employees.
- Just over half (52%) of people who think the euro will have positive consequences for their own country think that introducing the euro will increase prices, whereas 85% of people who think the euro will have negative consequences for their own country expect prices to rise.
- Around half (54%) of respondents who are in favour of the euro say that introducing the euro will increase prices, while 88% of those who are against it say this.

Q16 What impact, if any, do you think the introduction of the euro will have on prices in (OUR COUNTRY)?

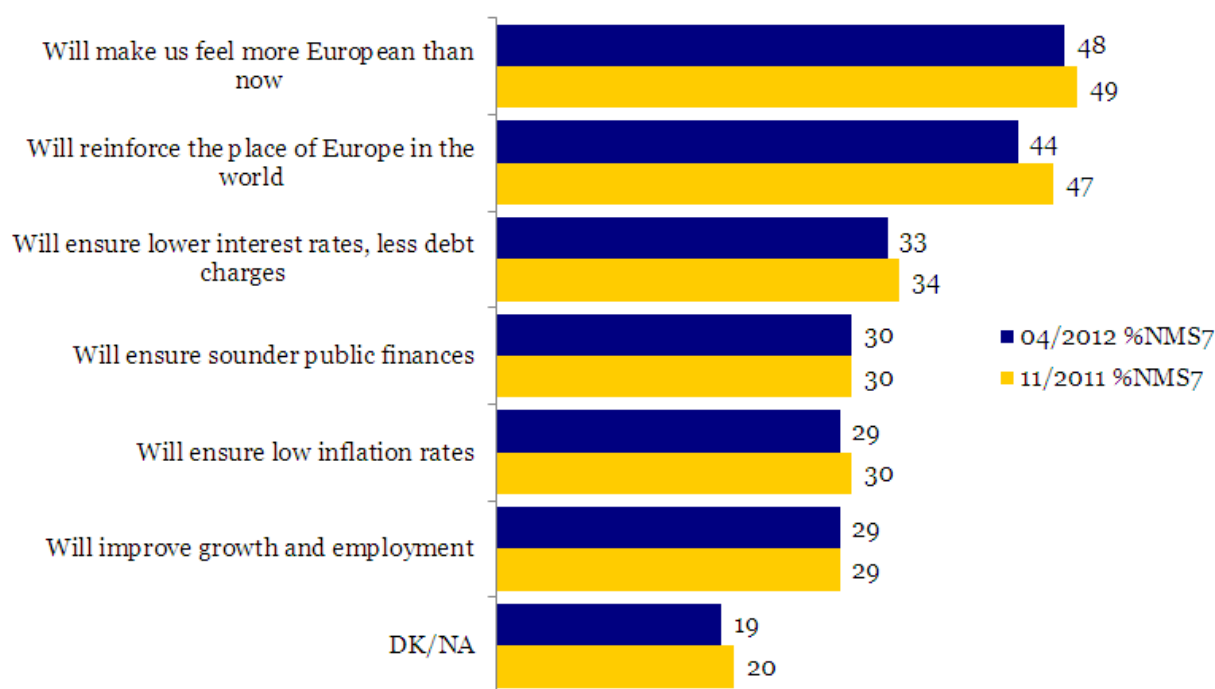
	Will increase prices	Will help keep prices stable	Will help reduce prices	No impact (DO NOT READ OUT)	DK/NA
NMS7	71%	20%	4%	2%	3%
 Sex					
Male	68%	24%	4%	1%	3%
Female	74%	17%	3%	2%	4%
 Age					
15-24	61%	28%	7%	2%	2%
25-39	72%	20%	3%	1%	4%
40-54	71%	20%	4%	2%	3%
55 +	74%	17%	3%	2%	4%
 Education (End of)					
15-	63%	18%	10%	2%	7%
16-19	69%	21%	5%	2%	3%
20+	75%	19%	2%	1%	3%
Still studying	62%	29%	7%	1%	1%
 Respondent occupation scale					
Self-employed	78%	16%	4%	1%	1%
Employee	71%	21%	2%	2%	4%
Manual workers	68%	21%	5%	1%	5%
Not working	70%	20%	5%	2%	3%
Expected consequences of the euro for own country					
Total 'Positive'	52%	37%	6%	2%	3%
Total 'Negative'	85%	9%	2%	1%	3%
Attitude towards the introduction of the euro in the country					
Total 'In favour'	54%	35%	6%	2%	3%
Total 'Against'	88%	6%	2%	1%	3%

2.2. Favourable political and economic consequences of the euro

- Nearly half of NMS7 respondents think that adopting the euro will make them feel more European than they do now -

All NMS7 respondents were asked whether introducing the euro would have certain favourable political and economic consequences in their country²⁹. Just under half of the respondents think that introducing the euro will make them feel more European than now (48%, -1 point compared with November 2011), and also that joining the euro will reinforce the place of Europe in the world (44%, -3 points). At least three people in ten think that introducing the euro will ensure lower interest rate charges and less debt charges (33%, -1 point), and that it will ensure sounder public finances (30%, no change). Just under three out of 10 respondents think that introducing the euro will ensure low inflation rates (29%, -1 points) or improve growth and employment (29%, no change). One respondent in five (19%, -1 point) say they don't know what the effects will be.

Favourable political and economic consequences of the euro



Q18 In your opinion, what of the following do you think the adoption of the euro will do for (OUR COUNTRY)?

Base: all respondents, % NMS7

²⁹ Q18: In your opinion, what of the following do you think the adoption of the euro will do for (OUR COUNTRY)? (MULTIPLE ANSWERS POSSIBLE). Will ensure lower interest rates, less debt charges; will ensure sounder public finances; will improve growth and employment; will ensure low inflation rates; will reinforce the place of Europe in the world; will make us feel more European than now; don't know/no answer.

As in the previous wave of the survey, Romania has the highest, or joint highest, proportion of respondents who expect positive political and economic consequences to result from introducing the euro on all six issues. On five of the six issues, the Czech Republic has the lowest proportion, the exception being whether introducing the euro will reinforce the place of Europe in the world (42%), on which point Poland has the lowest number of proponents (36%).

In three countries, the most respondents think that joining the euro will make them feel more European than now: Poland (53%), Bulgaria (48%) and Lithuania (48%). A relatively high proportion of people in Romania (54%) also hold this view, although relatively few do so in the Czech Republic (30%) and Hungary (37%).

In four countries, the most respondents think that the euro will reinforce the place of Europe in the world: Romania (59%), Latvia (53%), Hungary (43%), and the Czech Republic (42%). At least four people in ten also hold this view in Lithuania (44%) and Bulgaria (41%), although relatively few do so in Poland (36%).








The proportion of respondents who say they don't know what the adoption of the euro will do for their country ranges from 39% in the Czech Republic to 13% in Romania.

There some substantial changes in the country-level results compared with November 2011. In Bulgaria, there were positive shifts in the number of respondents who think that introducing the euro will reinforce the place of Europe in the world (41%, +11 points), that it will ensure lower interest rates (31%, +5 points) and sounder public finances (35%, +9 points), and that it will improve growth and employment (25%, +8 points).

One very positive evolution also occurred in Hungary, with an increase in the number of respondents who think that introducing the euro will make us feel more European (37%, +9 points). In Latvia there was an upswing in the number of respondents who think that introducing the euro will reinforce the place of Europe in the world (53%, +6 points).

However, some downward trends were also observed. In Poland, for example, the number of respondents who think that introducing the euro will reinforce the place of Europe in the world declined (36%, -8 points), as it did in Lithuania (44%, -5 points) and Romania (59%, -3 points).

Q18 In your opinion, what of the following do you think the adoption of the euro will do for (OUR COUNTRY)?

	Will make us feel more European than now	Will reinforce the place of Europe in the world	Will ensure lower interest rates, less debt charges	Will ensure sounder public finances	Will improve growth and employment	Will ensure low inflation rates	Don't know
NMS 7	48%	44%	33%	30%	29%	29%	19%
 BG	48%	41%	31%	35%	25%	26%	22%
 CZ	30%	42%	16%	17%	12%	19%	39%
 LV	49%	53%	30%	32%	27%	24%	18%
 LT	48%	44%	29%	36%	23%	24%	18%
 HU	37%	43%	36%	30%	36%	34%	15%
 PL	53%	36%	29%	23%	27%	25%	17%
 RO	54%	59%	48%	44%	41%	41%	13%

Highest percentage per country

Lowest percentage per country

Highest percentage per item

Lowest percentage per item

The socio-demographic data show that:

- Men are more likely than women to think that all six of the political and economic consequences under consideration will result from joining the euro, with the exception of reinforcing Europe's place in the world, which equal numbers of men and women expect to occur.
- Young respondents (15-24) are more likely than the other age categories to think that all six of the political and economic consequences under consideration will result from joining the euro.
- Employees are the most likely to think that introducing the euro will ensure lower interest rates and less debt charges, though they are the least likely to think that joining the euro will make them feel more European.
- Individuals who feel informed about the euro are more likely (36%) to say that joining would ensure lower interest rates and less charges than those who do not feel informed (31%).
- People who think the consequences of the euro in countries already using the euro are positive are much more likely to think that favourable economic and political consequences would result from joining.
- People in favour of the euro are similarly far more likely to say that favourable economic and political consequences would result.

Q18 In your opinion, what of the following do you think the adoption of the euro will do for (OUR COUNTRY)? (MULTIPLE ANSWERS POSSIBLE)

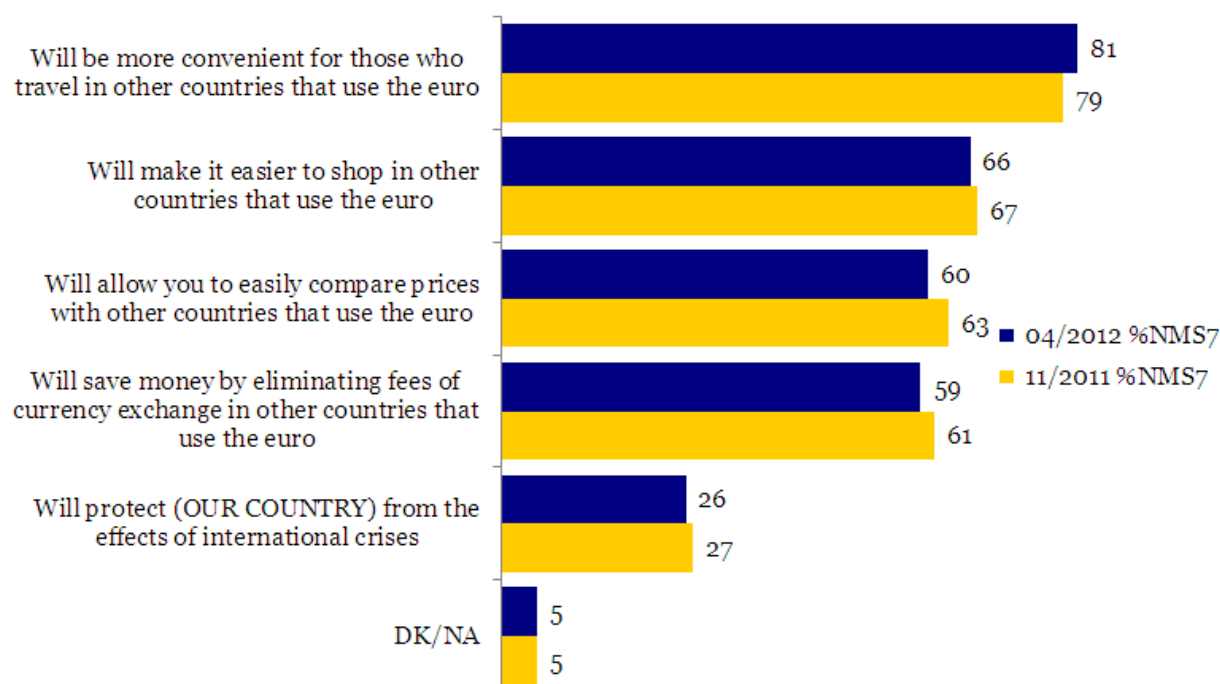
	Will make us feel more European than now	Will reinforce the place of Europe in the world	Will ensure lower interest rates, less debt charges	Will ensure sounder public finances	Will improve growth and employment	Will ensure low inflation rates	DK/NA
NMS7	48%	44%	33%	30%	29%	29%	19%
Sex							
Male	50%	44%	36%	33%	32%	33%	16%
Female	47%	44%	29%	26%	27%	25%	22%
Age							
15-24	53%	51%	34%	32%	39%	32%	7%
25-39	44%	43%	33%	28%	26%	29%	21%
40-54	49%	43%	34%	32%	27%	30%	19%
55 +	48%	41%	30%	28%	28%	26%	24%
Respondent occupation scale							
Self-employed	50%	40%	34%	29%	23%	28%	20%
Employee	45%	45%	36%	32%	27%	31%	19%
Manual workers	49%	44%	30%	28%	31%	30%	20%
Not working	49%	43%	32%	29%	31%	27%	19%
Level of information about the euro							
Total 'Informed'	49%	46%	36%	32%	32%	33%	17%
Total 'Not informed'	48%	43%	31%	28%	28%	27%	20%
Consequences in countries already using it							
Total 'Positive'	59%	55%	42%	42%	43%	39%	7%
Total 'Negative'	38%	33%	24%	17%	15%	19%	31%
Attitude towards the introduction of the euro in the country							
Total 'In favour'	64%	58%	44%	44%	45%	42%	5%
Total 'Against'	34%	30%	22%	16%	14%	16%	32%

3. PRACTICAL CONSEQUENCES OF THE EURO CHANGEOVER

- Respondents are generally convinced that joining the euro will have positive consequences, though they doubt whether joining will protect their country from international crises -

All NMS7 respondents were asked about the practical consequences of joining the euro³⁰. An absolute majority think that four of the five consequences under discussion will result. Over four fifths (81%, +2 points compared with November 2011) think that it will be more convenient for those who travel in other countries that use the euro, and two thirds (66%, -1 point) say that joining will make it easier to shop in other countries that use the euro. Six out of ten respondents say that joining the euro will allow people to easily compare prices with other countries that use the euro (60%, -3 points), and that it will save money by eliminating fees of currency exchange in other countries that use the euro (59%, -2 points). However, only a quarter of respondents think that introducing the euro will protect their country from the effects of international crises (26%, -1 point).

Practical consequences of the euro changeover



Q17 Do you think that the euro...? Base: all respondents, % NMS7

³⁰ Q17: Do you think that the euro...? (MULTIPLE ANSWERS POSSIBLE). Will allow you to easily compare prices with other countries that use the euro; will make it easier to shop in other countries that use the euro; will save money by eliminating fees of currency exchange in other countries that use the euro; will be more convenient for those who travel in other countries that use the euro; will protect (OUR COUNTRY) from the effects of international crises; don't know/no answer.

In all seven countries, the most respondents say that joining the euro will make it more convenient for those who travel in other countries that use the euro, ranging from the 88% who think this in the Czech Republic to the 71% who think so in Hungary.

In all the NMS7 countries, 'joining the euro will make it easier to shop in other countries that use the euro' is the second most popular answer. The proportions of respondents giving this answer range from 74% in the Czech Republic to 60% in Lithuania.

On four of the five questions, the Czech Republic has the highest proportion of respondents who think that the favourable consequence under discussion will result from joining the euro. However, the Czech Republic has the lowest proportion of respondents (14%) who think the euro will protect their country from international crises (compared with the highest, Romania, on 33%). On three questions, Lithuania has the lowest proportion of respondents who think that the favourable consequence under discussion will result from joining the euro.








Bulgaria recorded the most substantial positive evolutions since November 2011. There were increases in the number of people who think that it will be more convenient for those who travel in other countries that use the euro (81%, +16 points); who say that joining will make it easier to shop in other countries that use the euro (61%, +11 points); who say that joining the euro will allow people to easily compare prices with other countries that use the euro (57%, +10 points); who think that it will save money by eliminating fees of currency exchange in other countries that use the euro (54%, +9 points); and who think that introducing the euro will protect their country from the effects of international crises (32%, +3 points).

While none of the other NMS7 countries experienced evolutions on this scale, there were some sizeable changes. In Hungary, there was an upswing in the number of people who think that it will be more convenient for those who travel in other countries that use the euro (71%, +5 points), but also a decrease in the number who say that joining the euro will allow people to easily compare prices with other countries that use the euro (58%, -5 points).

In Lithuania, there were decreases in the proportion of respondents who think that joining the euro will make it easier to shop in other countries that use the euro (60%, -6 points) and who think that it will save money by eliminating fees of currency exchange in other countries that use the euro (44%, -6 points).

Poland experienced falls in the proportion of respondents who say that joining the euro will allow people to easily compare prices with other countries that use the euro (56%, -8 points); will make it easier to shop in other countries that use the euro (63%, -4 points) and who think that it will save money by eliminating fees of currency exchange in other countries that use the euro (58%, -5 points).

Q17 Do you think that the euro...?




	Will be more convenient for those who travel in other countries that use the euro	Will make it easier to shop in other countries that use the euro	Will allow you to easily compare prices with other countries that use the euro	Will save money by eliminating fees of currency exchange in other countries that use the euro	Will protect (OUR COUNTRY) from the effects of international crises	Don't know
NMS 7	81%	66%	60%	59%	26%	5%
 BG	81%	61%	57%	54%	32%	7%
 CZ	88%	74%	70%	65%	14%	5%
 LV	85%	72%	64%	61%	25%	5%
 LT	82%	60%	52%	44%	21%	8%
 HU	71%	63%	58%	59%	30%	5%
 PL	78%	63%	56%	58%	24%	5%
 RO	85%	71%	66%	63%	33%	5%
Highest percentage per country		<i>Lowest percentage per</i>				
		Highest percentage per item		<i>Lowest percentage per</i>		

The socio-demographic data demonstrate that:

- Men are more likely than women to think that joining the euro will have all of the practical consequences under discussion, with the exception of the idea that joining will make it more convenient for people who travel in other countries.
- Young respondents are more likely to think that favourable consequences will result than their older counterparts. For example, 67% of 15-24 year-olds think it will allow people to easily compare prices with other countries that use the euro, compared with 51% of over-55s.
- People who spent longer in education are more likely to think that favourable consequences will result: for example, 61% of those who left education aged 20 or over think joining the euro will allow people to easily compare prices with other countries that use the euro, compared with 44% of those who left aged 15 or under. However, people in the latter group are more likely to think that joining the euro will protect their country from international crises.
- People who have already seen or used euro banknotes are more likely to think that favourable consequences will result from joining (except for the idea that it will protect one's country from international crises).
- Respondents who expect positive consequences to ensue from joining the euro for their country and for themselves personally are similarly more likely to think that all five practical consequences will follow.

- Those in favour of the euro are also more likely to think that all five practical consequences will result. For example, 69% of those in favour say that joining will save money by eliminating currency exchange fees; but only 50% of respondents who are against joining think this will happen.

Q17 Do you think that the euro...? (MULTIPLE ANSWERS POSSIBLE)

	Will be more convenient for those who travel in other countries that use the euro	Will make it easier to shop in other countries that use the euro	Will allow you to easily compare prices with other countries that use the euro	Will save money by eliminating fees of currency exchange in other countries that use the euro	Will protect (OUR COUNTRY) from the effects of international crises	DK/NA
NMS7	81%	66%	60%	59%	26%	5%
 Sex						
Male	79%	67%	61%	62%	28%	5%
Female	82%	65%	59%	57%	25%	5%
 Age						
15-24	83%	73%	67%	66%	28%	2%
25-39	82%	70%	65%	64%	23%	4%
40-54	79%	66%	62%	59%	28%	5%
55 +	79%	59%	51%	52%	27%	7%
 Education (End of)						
15-	77%	54%	44%	44%	29%	6%
16-19	80%	65%	59%	58%	28%	5%
20+	81%	66%	61%	61%	24%	5%
Still studying	84%	77%	69%	67%	30%	2%
Already seen euro banknotes						
Yes	81%	67%	62%	61%	26%	5%
No	74%	55%	45%	45%	30%	7%
Used euro banknotes						
Yes	82%	69%	64%	63%	25%	4%
No	78%	64%	55%	55%	26%	6%
Expected consequences of the euro for own country						
Total 'Positive'	84%	74%	68%	68%	44%	1%
Total 'Negative'	78%	61%	54%	53%	14%	7%
Expected personal consequences of the euro						
Total 'Positive'	85%	75%	70%	70%	42%	1%
Total 'Negative'	78%	60%	53%	52%	15%	7%
Attitude towards the introduction of the euro in the country						
Total 'In favour'	84%	75%	68%	69%	40%	2%
Total 'Against'	77%	58%	52%	50%	13%	8%

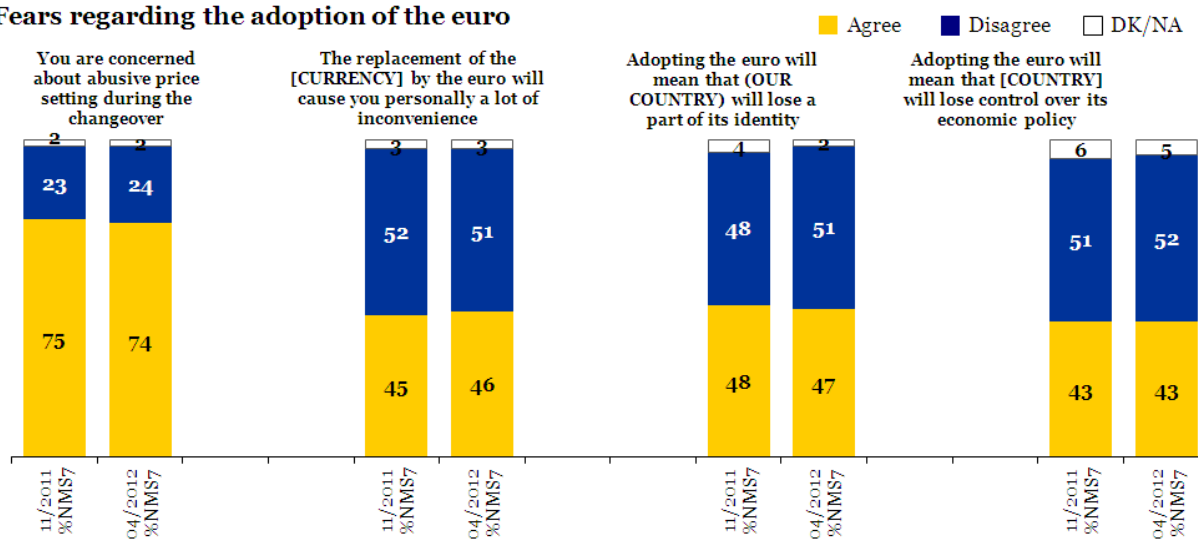
4. POTENTIAL INCONVENIENCES OF THE INTRODUCTION OF THE EURO

- Three quarters of respondents are concerned about abusive price setting during the euro changeover -

All NMS7 respondents were asked whether they agree or disagree with four statements about the effect that the changeover will have on them personally³¹. Nearly three quarters (74%) agree that they are concerned about abusive price setting during the changeover. This is very similar to the November 2011 result, when 75% of people agreed, and is the same as the May 2011 result.

However, only a minority of respondents agree with the other three statements, as in the previous wave. Just under half (47%, -1 point) of all respondents agree that adopting the euro will mean that their country will lose a part of its identity. 46% of respondents agree that the replacement of their national currency will cause them a lot of inconvenience (+1 point). And 43% agree that adopting the euro will mean that their country will lose control over its economic policy (no change).

Fears regarding the adoption of the euro



Q19.1-4. Could you tell me for each of the following statements if you agree or disagree...?

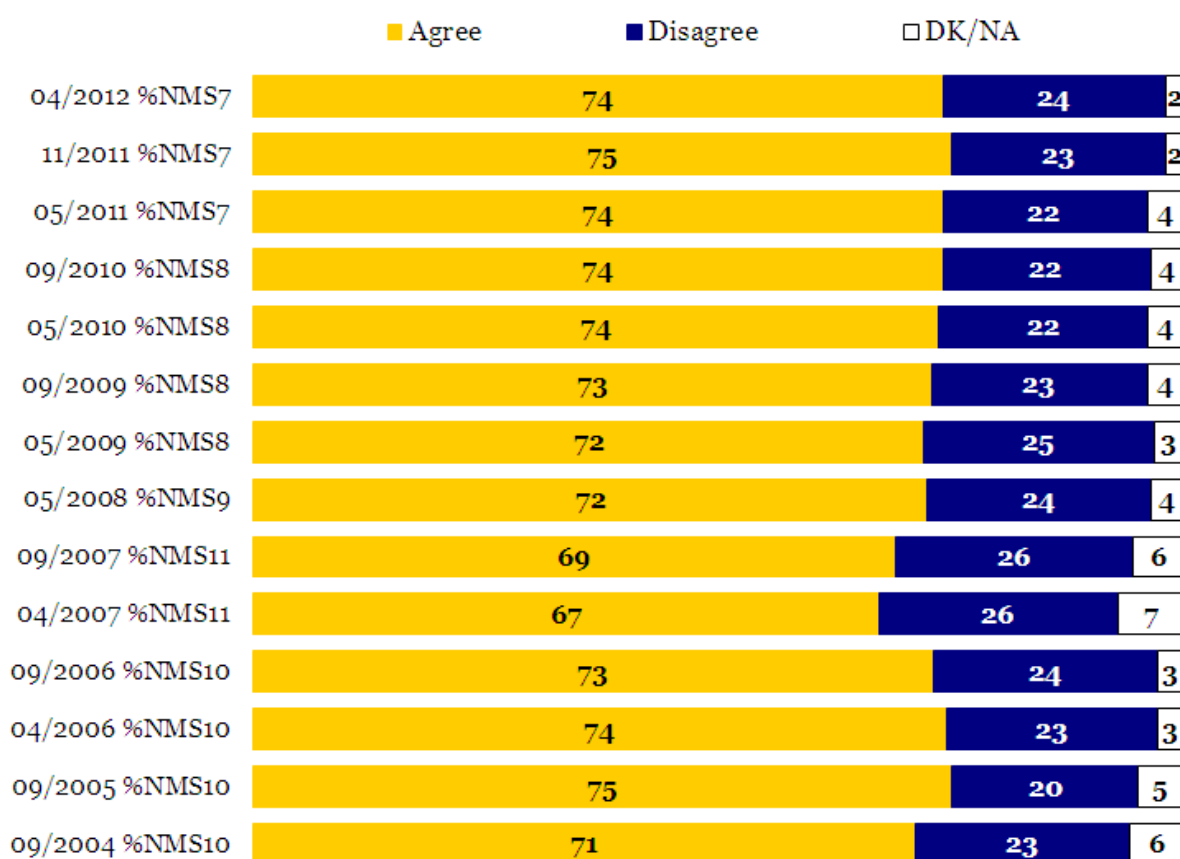
³¹ Q19: Could you tell me for each of the following statements if you agree or disagree...? The replacement of the (NATIONAL CURRENCY) by the euro will cause you personally a lot of inconvenience. You are concerned about abusive price setting during the changeover. Adopting the euro will mean that (OUR COUNTRY) will lose control over its economic policy. Adopting the euro will mean that (OUR COUNTRY) will lose a part of its identity. Totally agree; tend to agree; tend to disagree; totally disagree; don't know/no answer.

4.1. Concerns regarding abuses and cheating on prices during the changeover

- The level of concern about abusive price setting has fallen for the first time since April 2007 -

The 74% of respondents who express concern about abusive price setting marks a slight decline on the 75% who said they were concerned about this in November 2011. Of the 74% who express concern, 43% totally agree and 31% tend to agree. Of the 24% who say they are not concerned, 11% totally disagree and 13% tend to disagree. While the level of concern on this issue remains high by historical standards, this is the first time it has declined since April 2007, thus ending a very long-running trend of increasing concern about pricing abuses.

Concerns regarding the introduction of the euro: Fears of abuses and cheating on prices during the changeover

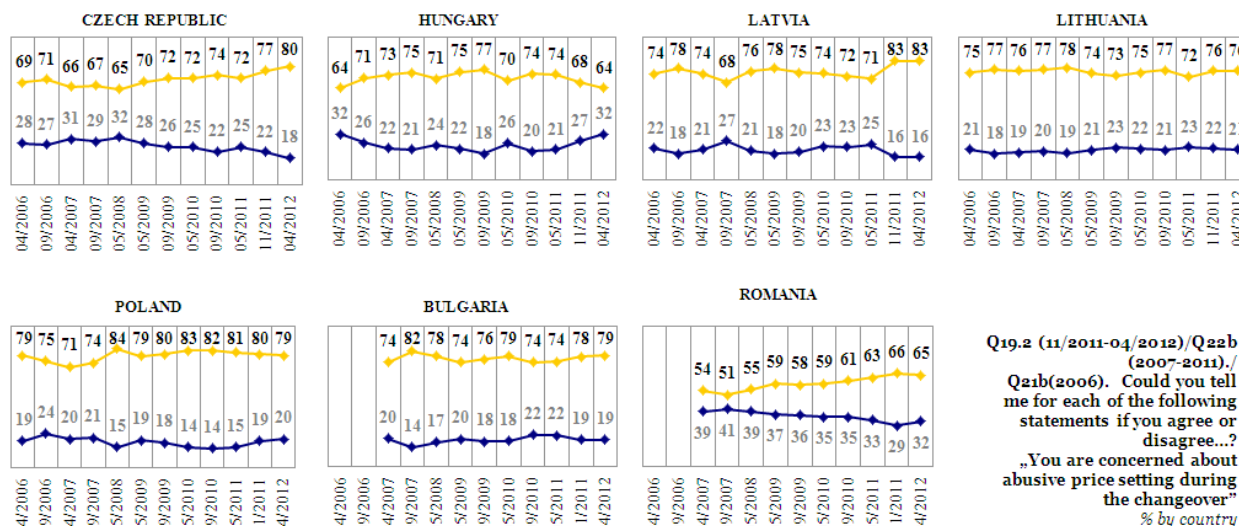


Q19.2(11/2011-04/2012)/Q22b.(2007-2011)/Q21b. (2006) Could you tell me for each of the following statements if you agree or disagree...?
„You are concerned about abusive price setting during the changeover”

The proportion of respondents expressing concern about abusive price setting ranges from the 83% who are worried about this in Latvia to the 64% who are worried about it in Hungary. The level of concern rose in the Czech Republic (80%, +3 points), declined in Hungary (64%, -4 points), and was broadly unchanged in the other five countries.

**Fears regarding the introduction of the euro:
afraid of abuses and cheating on prices during the changeover**

■ % agree ■ % disagree



According to the socio-demographic data:

- People in the 15-24 age group (70%) are less likely to think that the introduction of the euro will lead to abusive price setting than those in the three older age groups (75%).
- While 77% of people who completed their education aged 20 or over think the introduction of the euro will lead to abusive price setting, only 62% of those who left school aged 15 or under think the same thing.
- Two thirds (66%) of respondents who think the euro's introduction will have positive consequence for their country agree that it will lead to abusive price setting, whereas 81% of those who anticipate negative consequences say this.
- Of those in favour of the euro 68% say its introduction will lead to abusive price setting; but 81% of people who are against the euro expect this to happen.

Q19.2 Could you tell me for each of the following statements if you agree or disagree...?

You are concerned about abusive price setting during the changeover

	Total 'Agree'	Total 'Disagree'	DK/NA
NMS7	74%	24%	2%



Age

15-24	70%	30%	-
25-39	75%	24%	1%
40-54	75%	23%	2%
55 +	75%	22%	3%



Education (End of)

15-	62%	34%	4%
16-19	74%	24%	2%
20+	77%	22%	1%
Still studying	72%	27%	1%

Expected consequences of the euro for own country

Total 'Positive'	66%	33%	1%
Total 'Negative'	81%	18%	1%

Attitude towards the introduction of the euro in the country

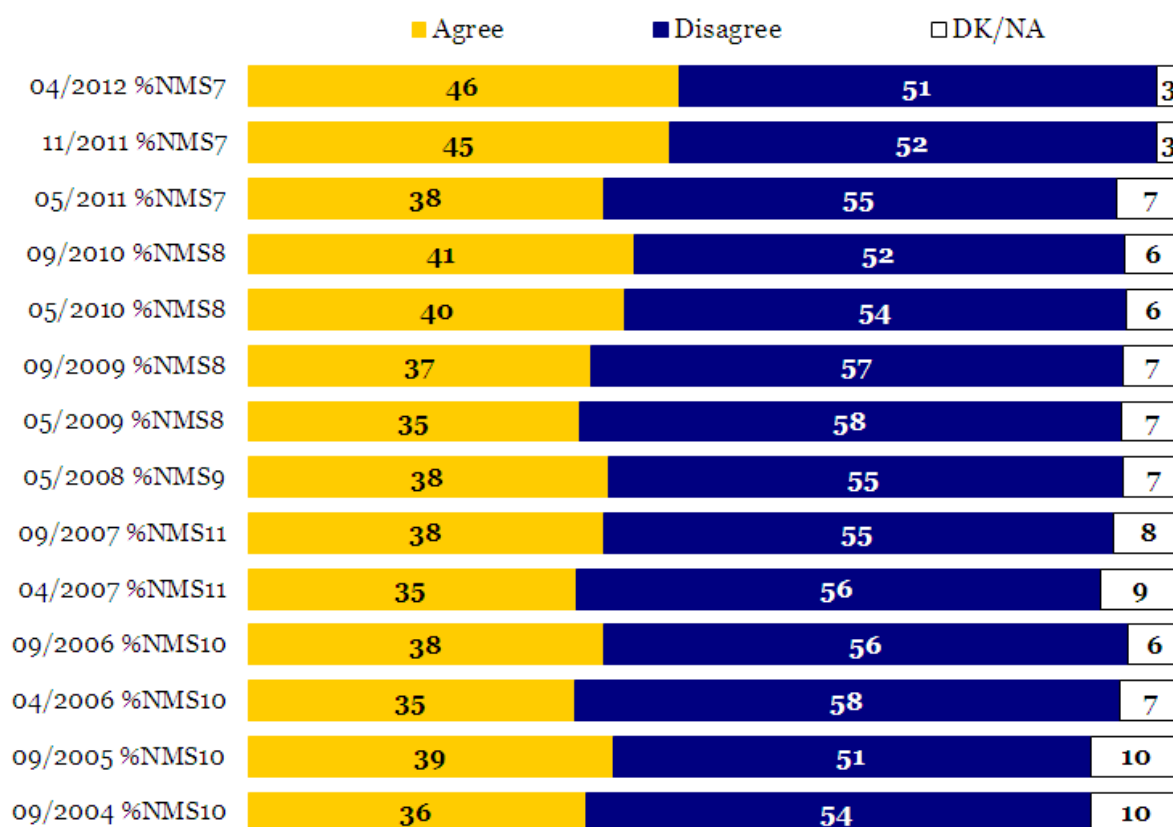
Total 'In favour'	68%	30%	2%
Total 'Against'	81%	18%	1%

4.2. Changes due to the euro's introduction

- The proportion of respondents who think the euro's introduction will cause them personal inconvenience has risen to a record high of 45% -

Nearly half (46%) of all NMS7 respondents agree that the introduction of the euro will cause them a lot of personal inconvenience: the most to have said this over the lifetime of the survey. 45% agreed in November 2011. Of the 46% who express concern about the inconvenience that the euro might cause, 22% totally agree and 24% tend to agree. Of the 51% who say the euro's introduction will not cause them a lot of inconvenience, 24% totally disagree and 27% tend to disagree.

Fears regarding the introduction of the euro: the euro will cause you personally a lot of inconvenience

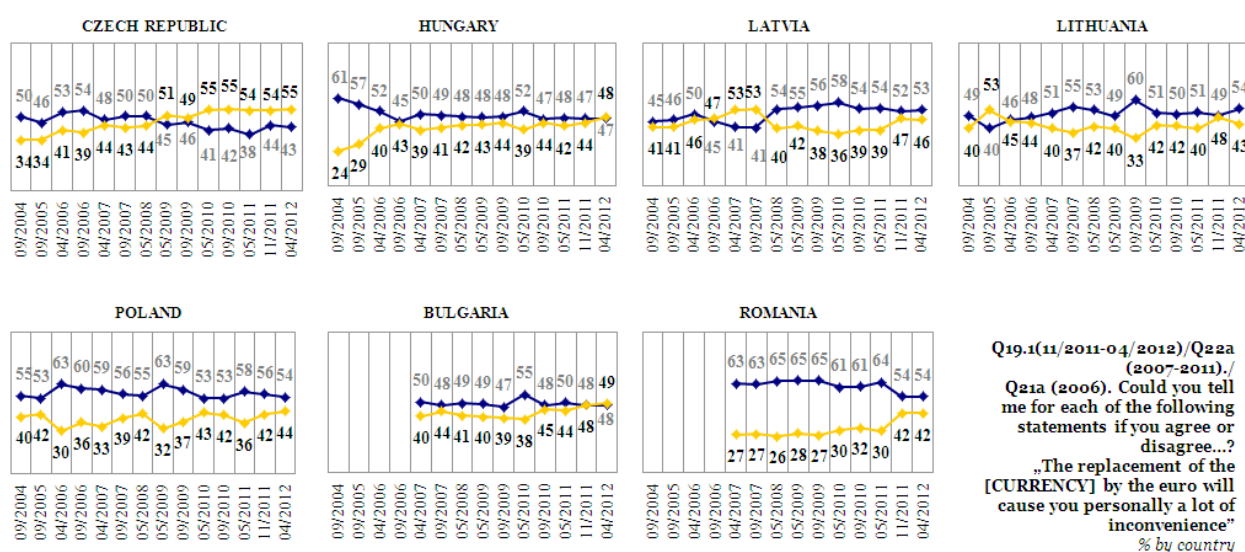


Q19.1(11/2011-04/2012)/Q22a.(2007-2011)/Q21a. (2006) Could you tell me for each of the following statements if you agree or disagree...?
„The replacement of national currency by the euro will cause you personally a lot of inconvenience“

The proportion of respondents who think the euro will cause them a lot of inconvenience ranges from the 55% who say this in the Czech Republic to the 42% who agree in Romania. An outstanding majority of respondents in the Czech Republic and a relative majority in Hungary and Bulgaria agree that introducing the euro would inconvenience them personally. Since November 2011 the level of agreement has risen in Hungary (48%, +4 points) and Poland (44%, +2 points); however, it declined in Lithuania (43%, -5 points).

**Fears regarding the introduction of the euro:
the euro will cause you personally a lot of inconvenience**

■ % agree ■ % disagree



According to the socio-demographic data:

- Women are more likely than men to think that the introduction of the euro will inconvenience them personally, by a margin of 52% to 39%.
- While 51% of people who left school aged 19 or under say the introduction of the euro will inconvenience them personally, only 41% of those who left aged 20 or over think the same thing.
- While 50% of manual workers think the introduction of the euro will inconvenience them personally, only 40% of employees agree.
- Only 27% of respondents who think the euro will have positive consequences for them agree that the introduction of the euro will inconvenience them personally, whereas 63% of those who expect it to have negative consequences expect to be inconvenienced.

- Of those in favour of the euro, only 29% say its introduction will inconvenience them personally; on the other hand, 63% of people who are against the euro expect to be inconvenienced by it.

Q19.1 Could you tell me for each of the following statements if you agree or disagree...?

The replacement of the (NATIONAL CURRENCY) by the euro will cause you personally a lot of inconvenience

	Total 'Agree'	Total 'Disagree'	DK/NA
NMS7	46%	51%	3%



Sex

Male	39%	58%	3%
Female	52%	45%	3%



Education (End of)

15-	51%	44%	5%
16-19	51%	46%	3%
20+	41%	57%	2%
Still studying	41%	57%	2%



Respondent occupation scale

Self-employed	44%	55%	1%
Employee	40%	57%	3%
Manual workers	50%	48%	2%
Not working	48%	48%	4%

Expected personal consequences of the euro

Total 'Positive'	27%	71%	2%
Total 'Negative'	63%	35%	2%

Attitude towards the introduction of the euro in the country

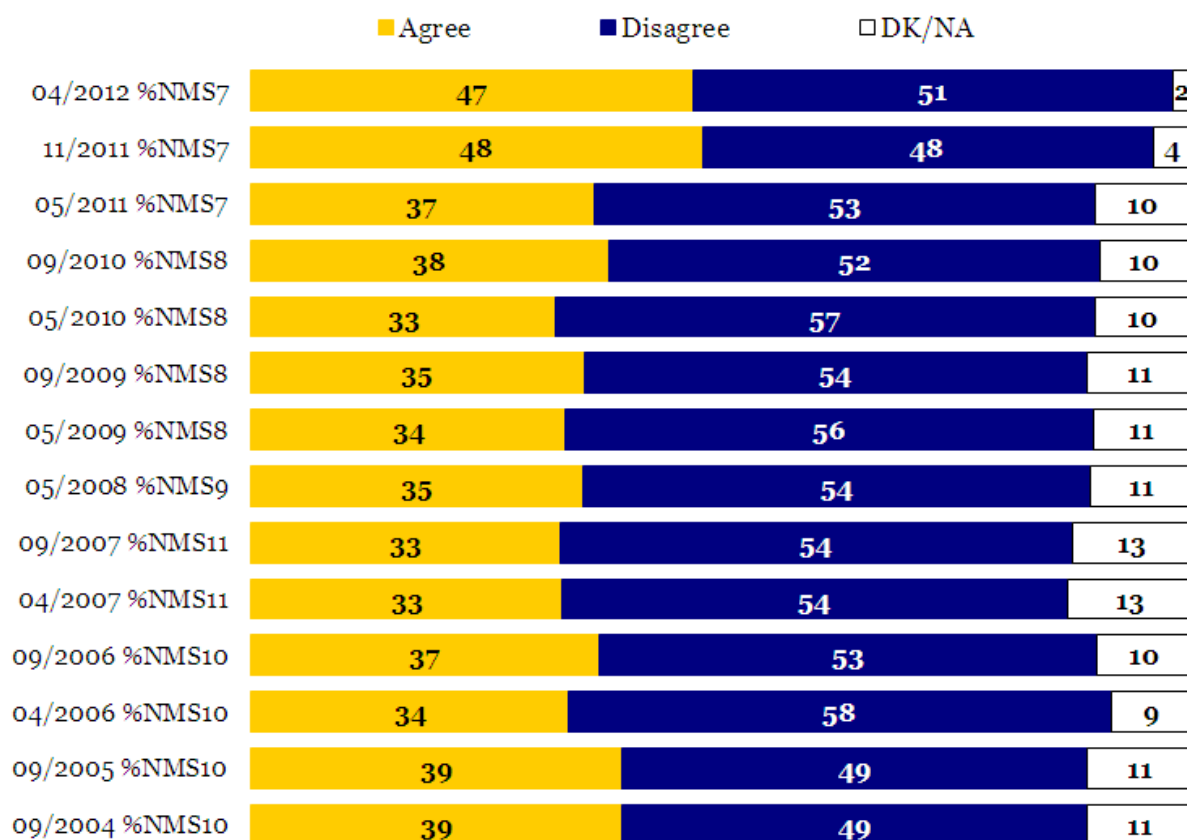
Total 'In favour'	29%	68%	3%
Total 'Against'	63%	35%	2%

4.3. Effects on national identity due to the adoption of the euro

- A majority of respondents do not think that introducing the euro would lead to a loss of national identity –

Just under half (47%) of all NMS7 respondents agree that adopting the euro will mean that their country will lose a part of its identity. Of these, 24% totally agree and 23% tend to agree. Of the 51% who disagree that adopting the euro will mean that their country will lose a part of its identity, 28% totally disagree and 23% tend to disagree. Slightly fewer people agree now than did so in November 2011 (when 48% agreed), although the level of agreement is still far higher than the 37% recorded in May 2011.

Fears regarding the introduction of the euro: adopting the euro will mean that [COUNTRY] will lose a great deal of its identity

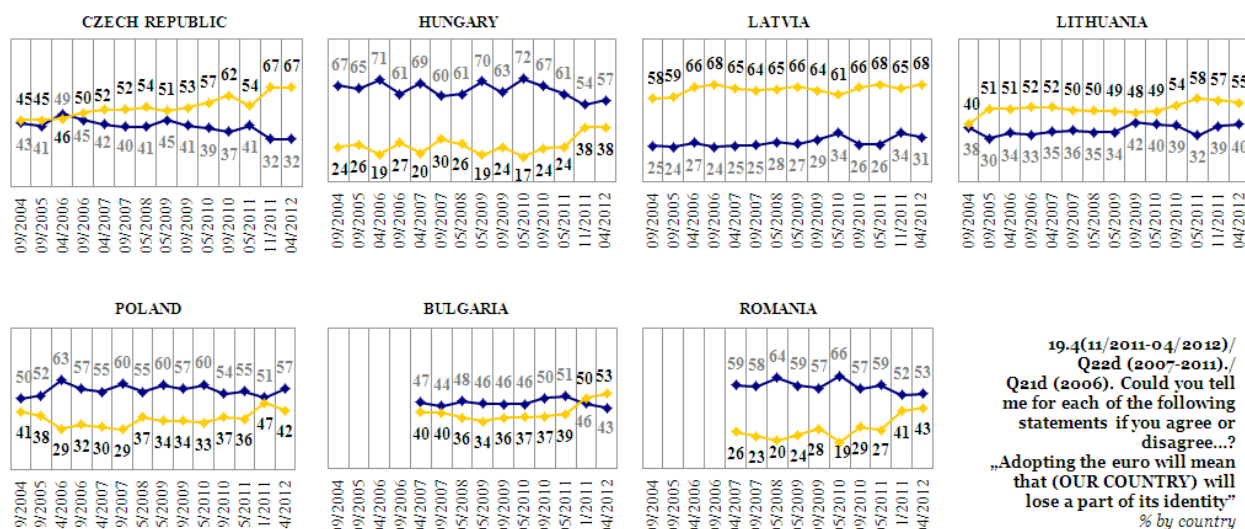


Q19.4(11/2011-04/2012)/Q22d.(2007-2011)/Q21d. (2006) Could you tell me for each of the following statements if you agree or disagree...?
„Adopting the euro will mean that (OUR COUNTRY) will lose a part of its identity”

The proportion of respondents who think adopting the euro will mean that their country will lose a part of its identity ranges from the 68% who say this in Latvia and the 67% who say this in the Czech Republic to the 38% who agree in Hungary. The level of agreement has risen since November 2011 in Latvia (68%, +3 points), Bulgaria (53%, +3 points) and Romania (43%, +2 points); but it fell in Poland (42%, -5 points) and Lithuania (55%, -2 points).

**Fears regarding the introduction of the euro:
adopting the euro will mean that [COUNTRY] will lose a great deal of its identity**

■ % agree ■ % disagree



According to the socio-demographic data:

- People in the 15-24 age group (55%) are the most likely to think that the introduction of the euro will lead to a loss of national identity, while those aged over 55 (41%) are the least likely.
- While 49% of people who live in rural villages and small/ mid-size towns think that the introduction of the euro will lead to a loss of national identity, only 42% of those who live in large towns think the same thing.
- 51% of self-employed people and 50% of manual workers believe the introduction of the euro will lead to a loss of national identity, but only 42% of employees agree.
- Only 33% of respondents who think the euro will have positive consequences for them agree that the introduction of the euro will lead to a loss of national identity, whereas 58% of those who expect it to have negative personal consequences say this.

- Of those in favour of the euro, only 31% say its introduction will lead to a loss of national identity. But 62% of people who are against the euro think a loss of national identity will occur.

Q19.4 Could you tell me for each of the following statements if you agree or disagree...?

Adopting the euro will mean that (OUR COUNTRY) will lose a part of its identity

	Total 'Agree'	Total 'Disagree'	DK/NA
NMS7	47%	51%	2%



Age

15-24	55%	45%	-
25-39	50%	49%	1%
40-54	45%	53%	2%
55 +	41%	54%	5%



Subjective urbanisation

Rural village	49%	49%	2%
Small/ Mid-size town	49%	48%	3%
Large town	42%	55%	3%



Respondent occupation scale

Self-employed	51%	48%	1%
Employee	42%	56%	2%
Manual workers	50%	49%	1%
Not working	47%	49%	4%

Expected personal consequences of the euro

Total 'Positive'	33%	65%	2%
Total 'Negative'	58%	39%	3%

Attitude towards the introduction of the euro in the country

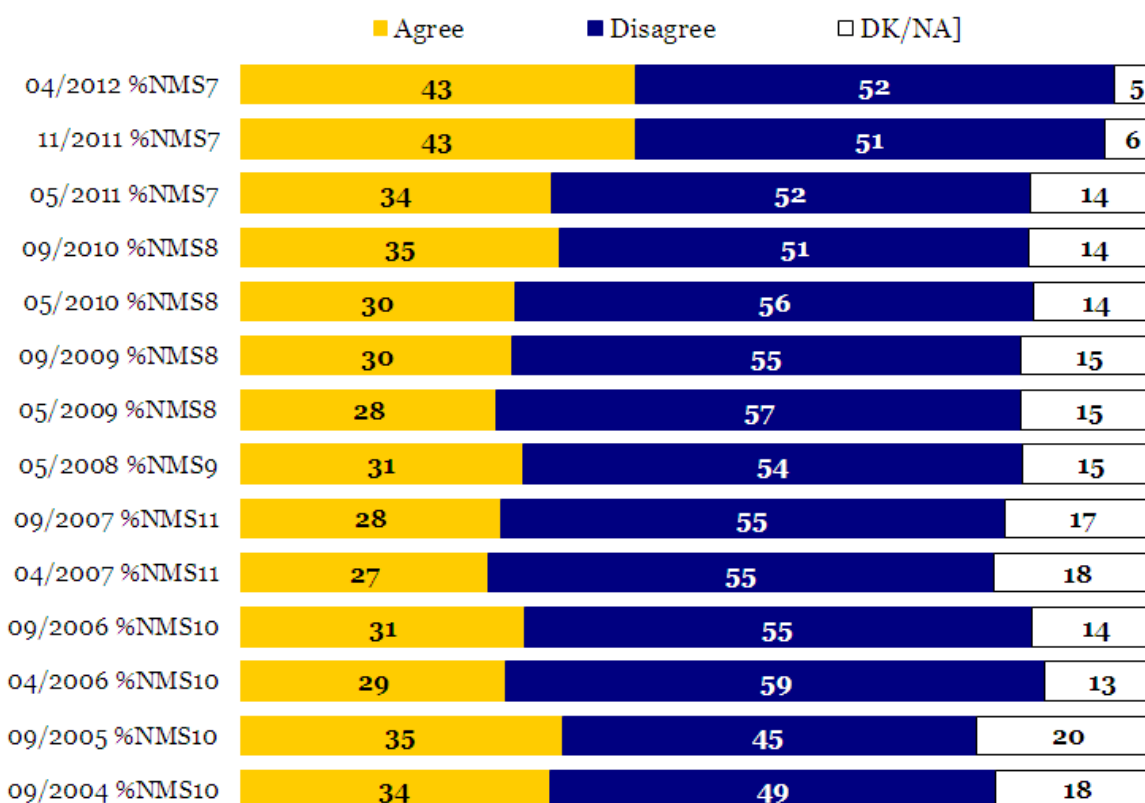
Total 'In favour'	31%	67%	2%
Total 'Against'	62%	36%	2%

4.4. Control over a nation's economic policy

- The proportion of respondents who think the euro's introduction will spell a loss of control over economic policy has remained at a record high of 43% -

An historically high proportion of respondents (43%) agree that adopting the euro will mean that their country will lose control over its economic policy. The same number of people said this in November 2011, and 43% remains the highest level of agreement on this question over the lifetime of the survey. Of these, 20% totally agree and 23% tend to agree. Of the 52% who disagree that adopting the euro will mean a loss of control over economic policy, 23% totally disagree and 29% tend to disagree.

Fears regarding the introduction of the euro: adopting the euro will mean that [COUNTRY] will lose control over its economic policy

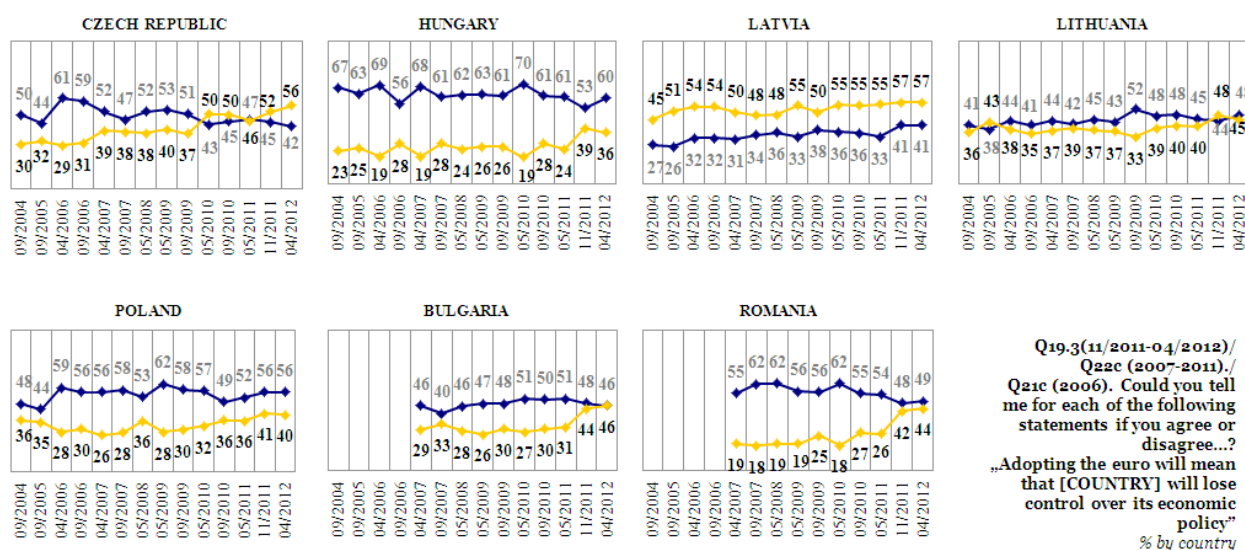


Q19.3(11/2011-04/2012)/Q22c.(2007-2011)/Q21c.(2006) Could you tell me for each of the following statements if you agree or disagree...?
 „Adopting the euro will mean that OUR COUNTRY will lose control over its economic policy”

The proportion of respondents who think adopting the euro will mean a loss of control over economic policy ranges from the 57% who say this in Latvia to the 36% who say so in Hungary. The level of agreement rose somewhat in the Czech Republic (56%, +4 points), Bulgaria (46%, +2 points), and Romania (44%, +2 points). It declined in Hungary (36%, -3 points).

**Fears regarding the introduction of the euro:
adopting the euro will mean that [COUNTRY] will lose control over its economic policy**

■ % agree ■ % disagree



According to the socio-demographic data:

- Men (55%) are slightly more likely than women (50%) to disagree that adopting the euro will lead to a loss of control over economic policy.
- While 47% of people who live in rural villages and 45% of people living in small/mid-size towns think that adopting the euro will lead to a loss of control over economic policy, only 39% of those who live in large towns say the same thing.
- While 50% of manual workers think adopting the euro will lead to a loss of control over economic policy, only 40% of employees agree.
- Only 30% of respondents who think the euro will have positive consequences for them agree that adopting the euro will lead to a loss of control over economic policy, whereas 55% of those who expect it to have negative consequences for them agree with this.
- Of those in favour of the euro, only 30% say its introduction will lead to a loss of control over economic policy. But 57% of people who are against the euro foresee a loss of economic control.

Q19.3 Could you tell me for each of the following statements if you agree or disagree...?

Adopting the euro will mean that (OUR COUNTRY) will lose control over its economic policy

	Total 'Agree'	Total 'Disagree'	DK/NA
NMS7	43%	52%	5%



Sex

Male	42%	55%	3%
Female	44%	50%	6%



Subjective urbanisation

Rural village	47%	48%	5%
Small/ Mid-size town	45%	51%	4%
Large town	39%	56%	5%



Respondent occupation scale

Self-employed	45%	52%	3%
Employee	40%	56%	4%
Manual workers	50%	46%	4%
Not working	43%	52%	5%

Expected personal consequences of the euro

Total 'Positive'	30%	67%	3%
Total 'Negative'	55%	40%	5%

Attitude towards the introduction of the euro in the country

Total 'In favour'	30%	67%	3%
Total 'Against'	57%	38%	5%

ANNEXES

TECHNICAL SPECIFICATIONS

FLASH EUROBAROMETER 349**"Introduction of the euro in the more recently acceded Member States"****TECHNICAL SPECIFICATIONS**

Between the 19th and the 21st of April 2012, TNS Political & Social, a consortium created between TNS political & social, TNS UK and TNS opinion, carried out the survey FLASH EUROBAROMETER 349 about "Introduction of the euro in the more recently acceded Member States".

This survey has been requested by the EUROPEAN COMMISSION, Directorate-general for Economic and Financial Affairs (DG ECFIN). It is a general public survey co-ordinated by the Directorate-General for Communication ("Research and Speechwriting" Unit). The FLASH EUROBAROMETER 349 covers the population of the respective nationalities of the European Union Member States, resident in Bulgaria, Czech Republic, Hungary, Lithuania, Latvia, Poland and Romania and aged 15 years and over. All interviews were carried using the TNS e-Call center (our centralized CATI system). In every country respondents were called both on fixed lines and mobile phones. The basic sample design applied in all states is multi-stage random (probability). In each household, the respondent was drawn at random following the "last birthday rule".

TNS has developed its own RDD sample generation capabilities based on using contact telephone numbers from responders to random probability or random location face to face surveys, such as Eurobarometer, as seed numbers. The approach works because the seed number identifies a working block of telephone numbers and reduces the volume of numbers generated that will be ineffective. The seed numbers are stratified by NUTS2 region and urbanisation to approximate a geographically representative sample. From each seed number the required sample of numbers are generated by randomly replacing the last two digits. The sample is then screened against business databases in order to exclude as many of these numbers as possible before going into field. This approach is consistent across all countries.

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from Eurostat population data or from national statistics offices. For all countries surveyed, a national weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. In all countries, gender, age, region and size of locality were introduced in the iteration procedure. For international weighting (i.e. EU averages), TNS Political & Social applies the official population figures as provided by EUROSTAT or national statistic offices. The total population figures for input in this post-weighting procedure are listed above.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

Statistical Margins due to the sampling process (at the 95% level of confidence)											
<i>various sample sizes are in rows</i>						<i>various observed results are in columns</i>					
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	
N=50	6,0	8,3	9,9	11,1	12,0	12,7	13,2	13,6	13,8	13,9	N=50
N=500	1,9	2,6	3,1	3,5	3,8	4,0	4,2	4,3	4,4	4,4	N=500
N=1000	1,4	1,9	2,2	2,5	2,7	2,8	3,0	3,0	3,1	3,1	N=1000
N=1500	1,1	1,5	1,8	2,0	2,2	2,3	2,4	2,5	2,5	2,5	N=1500
N=2000	1,0	1,3	1,6	1,8	1,9	2,0	2,1	2,1	2,2	2,2	N=2000
N=3000	0,8	1,1	1,3	1,4	1,5	1,6	1,7	1,8	1,8	1,8	N=3000
N=4000	0,7	0,9	1,1	1,2	1,3	1,4	1,5	1,5	1,5	1,5	N=4000
N=5000	0,6	0,8	1,0	1,1	1,2	1,3	1,3	1,4	1,4	1,4	N=5000
N=6000	0,6	0,8	0,9	1,0	1,1	1,2	1,2	1,2	1,3	1,3	N=6000
N=7000	0,5	0,7	0,8	0,9	1,0	1,1	1,1	1,1	1,2	1,2	N=7000
N=7500	0,5	0,7	0,8	0,9	1,0	1,0	1,1	1,1	1,1	1,1	N=7500
N=8000	0,5	0,7	0,8	0,9	0,9	1,0	1,0	1,1	1,1	1,1	N=8000
N=9000	0,5	0,6	0,7	0,8	0,9	0,9	1,0	1,0	1,0	1,0	N=9000
N=10000	0,4	0,6	0,7	0,8	0,8	0,9	0,9	1,0	1,0	1,0	N=10000
N=11000	0,4	0,6	0,7	0,7	0,8	0,9	0,9	0,9	0,9	0,9	N=11000
N=12000	0,4	0,5	0,6	0,7	0,8	0,8	0,9	0,9	0,9	0,9	N=12000
N=13000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,9	0,9	N=13000
N=14000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,8	0,8	N=14000
N=15000	0,3	0,5	0,6	0,6	0,7	0,7	0,8	0,8	0,8	0,8	N=15000
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	

ABBR.	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+
BG	Bulgaria	TNS BBSS	1.002	19/04/2012	21/04/2012	6.537.510
CZ	Czech Rep.	TNS Aisa s.r.o	1.000	19/04/2012	21/04/2012	9.012.443
LV	Latvia	TNS Latvia	1.000	19/04/2012	21/04/2012	1.447.866
LT	Lithuania	TNS LT	1.000	19/04/2012	21/04/2012	2.829.740
HU	Hungary	TNS Hoffmann Kft	1.001	19/04/2012	21/04/2012	8.320.614
PL	Poland	TNS OBOP	1.003	19/04/2012	21/04/2012	32.413.735
RO	Romania	TNS CSOP	1.004	19/04/2012	21/04/2012	18.246.731
TOTAL NMS7			7010	19/04/2012	21/04/2012	78.808.639

QUESTIONNAIRE

EB FLASH 349 - Introduction of the Euro in the More Recently Acceded Member States

ASK ALL				
---------	--	--	--	--

Q1	Have you already seen...?			
----	---------------------------	--	--	--

(ONE ANSWER PER LINE)				
-----------------------	--	--	--	--

		Yes	No	DK/NA
--	--	-----	----	-------

1	Euro banknotes	1	2	3
2	Euro coins	1	2	3

FL336				
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ASK Q2a IF THE RESPONDENT HAS SEEN EURO, Q1.1=1 OR Q1.2=1, OTHERS GO TO Q2b				
---	--	--	--	--

Q2a	Have you already used...?			
-----	---------------------------	--	--	--

(ONE ANSWER PER LINE)				
-----------------------	--	--	--	--

		Yes	No	DK/NA
--	--	-----	----	-------

1	(ASK ITEM 1 if CODE 1 IN Q1.1) Euro banknotes	1	2	3
2	(ASK ITEM 2 if CODE 1 IN Q1.2) Euro coins	1	2	3

FL336				
-------	--	--	--	--

ASK Q2b IF THE RESPONDENT ALREADY USED EURO BANK NOTES, Q2a.1=1, OTHERS GO TO Q2c				
---	--	--	--	--

Q2b	You said you already used euro banknotes. Was it...?			
-----	--	--	--	--

(READ OUT – ONE ANSWER ONLY)				
------------------------------	--	--	--	--

In (OUR COUNTRY)	1
Abroad	2
In (OUR COUNTRY) and abroad	3
DK/NA	4

FL336				
-------	--	--	--	--

ASK Q2c IF THE RESPONDENT ALREADY USED EURO COINS, Q2a.2=1, OTHERS GO TO Q3

Q2c You said you already used euro coins. Was it...?

(READ OUT – ONE ANSWER ONLY)

In (OUR COUNTRY)	1
Abroad	2
In (OUR COUNTRY) and abroad	3
DK/NA	4

FL336

ASK ALL

Q3 What do you think, which of the following statements is correct?

(READ OUT – ONE ANSWER ONLY)

The euro banknotes look exactly the same in all countries that use the euro	1
The euro banknotes have partly different designs from country to country	2
DK/NA	3

FL336

Q4	And what do you think, which of the following statements is correct?
----	--

(READ OUT – ONE ANSWER ONLY)

The euro coins look exactly the same in all countries that use the euro	1
The euro coins have partly different designs from country to country	2
DK/NA	3

FL336

Q5a	According to you, how many EU countries have already introduced the euro?
-----	---

(READ OUT – ONE ANSWER ONLY)

6	1
13	2
17	3
27	4
DK/NA	5

FL336

Q5b	In your opinion, can (OUR COUNTRY) choose whether or not to introduce the euro?
-----	---

(ONE ANSWER ONLY)

Yes	1
No	2
DK/NA	3

FL336

Q5c	When, in which year do you think the euro will be introduced in [OUR COUNTRY]?
-----	--

(READ OUT - RECORD EXACT YEAR) (INT.: IF "NEVER" CODE '9998' - IF "DK/NA" CODE '9999')
--

				Year
--	--	--	--	------

FL336

Q6	To what extent do you feel informed about the euro? Do you feel:
----	--

(READ OUT – ONE ANSWER ONLY)

Very well informed	1
Rather well informed	2
Not very well informed	3
Not at all well informed	4
DK/NA	5

FL336

Q7	When would you like to be informed about the introduction of euro in (OUR COUNTRY)?
----	---

(READ OUT – ONE ANSWER ONLY)

As soon as possible	1
A few years before	2
A few months before	3
A few weeks before	4
DK/NA	5

FL336

Q8	For each of the following institutions or groups, please tell me if you would trust information they provide on the changeover to the euro?
----	---

(ROTATE - READ OUT – MULTIPLE ANSWERS POSSIBLE)

Government, national or regional authorities	1,
Tax/ fiscal administrations	2,
National Central Bank	3,
European Institutions	4,
Commercial banks	5,
Journalists	6,
Trade unions, professional organisations, etc	7,
Consumer associations	8,
DK/NA	9,

FL336

Q9	Where would it be most useful for you to receive information about the euro and the changeover?
----	---

(ROTATE - READ OUT – MULTIPLE ANSWERS POSSIBLE)

In banks	1,
In supermarkets and shops	2,
In public places	3,
In schools and other places of education and training	4,
In the workplace	5,
On the radio	6,
On television	7,
In newspapers, magazines	8,
In your letter box	9,
On the Internet	10,
DK/NA	11,

FL336

Q10	In your view, which of the following issues about the euro are essential to be covered in priority by the information campaign?
-----	---

(ROTATE - READ OUT – MULTIPLE ANSWERS POSSIBLE)

The way how the euro will be introduced in (OUR COUNTRY)	1,
The value of one euro in (COUNTRY CURRENCY)	2,
What notes and coins in euros look like	3,
How to ensure that the rules for the currency conversion into euro are respected	4,
The practical implications of the euro regarding your salary, your bank account	5,
The social, economic or political implications of the euro	6,
DK/NA	7,

FL336

Q11	Here is a list of various information campaign actions. Could you tell me for each of them whether you would find it essential?
-----	---

(ROTATE - READ OUT – MULTIPLE ANSWERS POSSIBLE)

Dual display of prices in shops	1,
Dual display of the amount on bills (electricity, gas ...)	2,
Dual display on your pay slip	3,
Leaflets/ brochures	4,
TV advertisements	5,
Radio advertisements	6,
Newspaper advertisements	7,
DK/NA	8,

FL336

Q12	Do you think the introduction of the euro has had positive or negative consequences in those countries that are using the euro already?
-----	---

(READ OUT – ONE ANSWER ONLY)

Very positive consequences	1
Rather positive consequences	2
Rather negative consequences	3
Very negative consequences	4
DK/NA	5

FL336

Q13	Do you think the introduction of the euro would have positive or negative consequences for...?
-----	--

(ONE ANSWER PER LINE)

	(READ OUT)	Very positive consequences	Rather positive consequences	Rather negative consequences	Very negative consequences	DK/NA
--	------------	----------------------------	------------------------------	------------------------------	----------------------------	-------

1	[OUR COUNTRY]	1	2	3	4	5
2	For you personally	1	2	3	4	5

FL336

Q14	Generally speaking, are you personally more in favour or against the idea of introducing the euro in (OUR COUNTRY)?
-----	---

(READ OUT – ONE ANSWER ONLY)

Very much in favour of its introduction	1
Rather in favour of its introduction	2
Rather against its introduction	3
Very much against its introduction	4
DK/NA	5

FL336

Q15	When would you like the euro to become your currency?
-----	---

(READ OUT – ONE ANSWER ONLY)

As soon as possible	1
After a certain time	2
As late as possible	3
DK/NA	4

FL336

Q16	What impact, if any, do you think the introduction of the euro will have on prices in (OUR COUNTRY)?
-----	--

(READ OUT – ONE ANSWER ONLY)

Will increase prices	1
Will help keep prices stable	2
Will help reduce prices	3
No impact (DO NOT READ OUT)	4
DK/NA	5

FL336

Q17	Do you think that the euro...?
-----	--------------------------------

(READ OUT – MULTIPLE ANSWERS POSSIBLE)

Will allow you to easily compare prices with other countries that use the euro	1,
Will make it easier to shop in other countries that use the euro	2,
Will save money by eliminating fees of currency exchange in other countries that use the euro	3,
Will be more convenient for those who travel in other countries that use the euro	4,
Will protect (OUR COUNTRY) from the effects of international crises	5,
DK/NA	6,

FL336

Q18	In your opinion, what of the following do you think the adoption of the euro will do for (OUR COUNTRY)?
-----	---

(READ OUT – MULTIPLE ANSWERS POSSIBLE)

Will ensure lower interest rates, less debt charges	1,
Will ensure sounder public finances	2,
Will improve growth and employment	3,
Will ensure low inflation rates	4,
Will reinforce the place of Europe in the world	5,
Will make us feel more European than now	6,
DK/NA	7,

FL336

Q19	Could you tell me for each of the following statements if you agree or disagree...?
-----	---

(ONE ANSWER PER LINE)

	(ROTATE - READ OUT)	Totally	Tend to	Tend to	Totally	DK/NA
--	---------------------	---------	---------	---------	---------	-------

1	The replacement of the (NATIONAL CURRENCY) by the euro will cause you personally a lot of inconvenience	1	2	3	4	5
2	You are concerned about abusive price setting during the changeover	1	2	3	4	5
3	Adopting the euro will mean that (OUR COUNTRY) will lose control over its economic policy	1	2	3	4	5
4	Adopting the euro will mean that (OUR COUNTRY) will lose a part of its identity	1	2	3	4	5

FL336








TABLES

Q1.1 Avez-vous déjà vu...?

Des billets d'euro

Q1.1 Have you already seen...?

Euro banknotes








		Oui Yes		Non No		NSP/SR DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	82	-4	18	4	0	0
	CZ	93	-1	7	1	0	0
	LV	84	-1	16	1	0	0
	LT	82	-2	18	2	0	0
	HU	82	-2	18	2	0	0
	PL	89	-1	11	1	0	0
	RO	95	1	5	-1	0	0

Q1.2 Avez-vous déjà vu...?

Des pièces d'euro

Q1.2 Have you already seen...?

Euro coins








		Oui Yes		Non No		NSP/SR DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	79	<i>-1</i>	21	<i>1</i>	0	<i>0</i>
	CZ	91	<i>1</i>	9	<i>-1</i>	0	<i>0</i>
	LV	76	<i>-2</i>	24	<i>2</i>	0	<i>0</i>
	LT	75	<i>1</i>	24	<i>-2</i>	1	<i>1</i>
	HU	81	<i>-3</i>	19	<i>3</i>	0	<i>0</i>
	PL	85	<i>-3</i>	15	<i>3</i>	0	<i>0</i>
	RO	85	<i>2</i>	15	<i>-2</i>	0	<i>0</i>

Q2a.1 Avez-vous déjà utilisé...?

Des billets d'euro

Q2a.1 Have you already used...?

Euro banknotes








		Oui Yes		Non No		NSP/SR DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	74	<i>-1</i>	26	<i>1</i>	0	<i>0</i>
	CZ	82	<i>2</i>	18	<i>-2</i>	0	<i>0</i>
	LV	70	<i>-2</i>	30	<i>2</i>	0	<i>0</i>
	LT	67	<i>6</i>	33	<i>-6</i>	0	<i>0</i>
	HU	67	<i>-2</i>	33	<i>2</i>	0	<i>0</i>
	PL	70	<i>4</i>	30	<i>-4</i>	0	<i>0</i>
	RO	81	<i>2</i>	19	<i>-2</i>	0	<i>0</i>

Q2a.2 Avez-vous déjà utilisé...?

Des pièces d'euro

Q2a.2 Have you already used...?

Euro coins








		Oui Yes		Non No		NSP/SR DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	65	-4	35	4	0	0
	CZ	83	0	17	0	0	0
	LV	62	-3	38	3	0	0
	LT	65	6	35	-6	0	0
	HU	66	-3	34	3	0	0
	PL	68	3	32	-3	0	0
	RO	65	-2	35	2	0	0

Q2ab.1 Avez-vous déjà utilisé...?

Des billets d'euro

Q2ab.1 Have you already used...?

Euro banknotes








		Oui Yes	Non No	NSP/SR DK/NA
		EB 34.9	EB 34.9	EB 34.9
	BG	61	21	18
	CZ	76	17	7
	HU	55	27	18
	LV	58	25	17
	LT	55	27	18
	PL	62	27	11
	RO	77	18	5

Q2ab.2 Avez-vous déjà utilisé...?

Des pièces d'euro








Q2ab.2 Have you already used...?

Euro coins

		Oui Yes	Non No	NSP/SR DK/NA
		EB 34.9	EB 34.9	EB 34.9
	BG	51	27	22
	CZ	75	15	10
	HU	53	27	20
	LV	47	29	24
	LT	49	26	25
	PL	58	27	15
	RO	55	29	16








Q2b Vous dites avoir déjà utilisé des billets d'euro. Était-ce... ?

Q2b You said you already used euro banknotes. Was it...?

		Dans (NOTRE PAYS) In (OUR COUNTRY)		A l'étranger Abroad		Dans (NOTRE PAYS) et à l'étranger In (OUR COUNTRY) and abroad		NSP/SR DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	24	-3	44	2	32	1	0	0
	CZ	3	-1	76	3	21	-2	0	0
	LV	14	1	61	0	25	-1	0	0
	LT	15	-4	60	-1	25	5	0	0
	HU	9	-1	68	-4	23	5	0	0
	PL	11	0	61	6	28	-6	0	0
	RO	41	-1	16	1	43	0	0	0








Q2c Vous dites avoir déjà utilisé des pièces d'euro. Était-ce... ?

Q2c You said you already used euro coins. Was it...?

		Dans (NOTRE PAYS) In (OUR COUNTRY)		A l'étranger Abroad		Dans (NOTRE PAYS) et à l'étranger In (OUR COUNTRY) and abroad		NSP/SR DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	12	-4	64	8	23	-5	1	1
	CZ	3	0	80	1	17	-1	0	0
	LV	4	1	86	5	10	-5	0	-1
	LT	9	-2	76	0	15	2	0	0
	HU	8	-2	70	-1	22	3	0	0
	PL	7	0	73	2	20	-2	0	0
	RO	25	-1	43	3	32	-1	0	-1








Q3 Selon vous, laquelle des affirmations suivantes est correcte ?

Q3 What do you think, which of the following statements is correct?

		Les billets d'euro sont exactement les mêmes dans tous les pays qui utilisent cette monnaie		Les billets d'euro ont certains motifs qui sont différents d'un pays à l'autre		NSP/SR	
		The euro banknotes look exactly the same in all countries that use the euro		The euro banknotes have partly different designs from country to country		DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	50	3	29	1	21	-4
	CZ	51	-2	38	1	11	1
	LV	47	2	39	-1	14	-1
	LT	51	-2	29	-3	20	5
	HU	49	4	38	-3	13	-1
	PL	42	2	37	-1	21	-1
	RO	71	-2	14	1	15	1








Q4 Selon vous, laquelle des affirmations suivantes est correcte ?

Q4 And what do you think, which of the following statements is correct?

		Les pièces d'euro sont exactement les mêmes dans tous les pays qui utilisent cette monnaie		Les pièces d'euro ont certains motifs différents d'un pays à l'autre		NSP/SR	
		The euro coins look exactly the same in all countries that use the euro		The euro coins have partly different designs from country to country		DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	42	4	35	1	23	-5
	CZ	42	-2	45	-1	13	3
	LV	38	5	45	-4	17	-1
	LT	39	-4	39	0	22	4
	HU	43	4	41	-4	16	0
	PL	41	1	40	0	19	-1
	RO	64	-3	17	1	19	2








Q5a Selon vous, combien de pays ont déjà introduit l'euro ?

Q5a According to you, how many EU countries have already introduced the euro?

		6		13		17		27		NSP/SR		Total 'Réponses incorrectes'	
		6		13		17		27		DK/NA		Total 'Wrong answers'	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	10	-2	38	6	29	4	6	1	17	-9	54	5
	CZ	11	0	41	-1	36	0	4	-2	8	3	56	-3
	LV	12	0	40	-3	33	3	6	1	9	-1	58	-2
	LT	13	0	37	0	33	2	5	0	12	-2	55	0
	HU	12	1	44	-1	31	1	6	1	7	-2	62	1
	PL	16	-2	42	0	29	2	3	2	10	-2	61	0
	RO	13	-3	28	5	25	4	11	4	23	-10	52	6








Q5b Selon vous, (NOTRE PAYS) peut-elle choisir d'introduire l'euro ou non ?

Q5b In your opinion, can (OUR COUNTRY) choose whether or not to introduce the euro?

		Oui Yes		Non No		NSP/SR DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	68	<i>5</i>	27	<i>-2</i>	5	<i>-3</i>
	CZ	77	<i>5</i>	21	<i>-4</i>	2	<i>-1</i>
	LV	65	<i>-2</i>	31	<i>1</i>	4	<i>1</i>
	LT	65	<i>1</i>	29	<i>-2</i>	6	<i>1</i>
	HU	54	<i>-1</i>	41	<i>1</i>	5	<i>0</i>
	PL	75	<i>2</i>	21	<i>-3</i>	4	<i>1</i>
	RO	71	<i>1</i>	24	<i>-1</i>	5	<i>0</i>








Q5c Quand, en quelle année, pensez-vous que l'euro sera introduit en (NOTRE PAYS) ?

Q5c When, in which year do you think the euro will be introduced in [OUR COUNTRY]?

		2011-2012		2013-2014		2015-2016		2017 ou plus tard		Jamais		NSP/SR	
		2011-2012		2013-2014		2015-2016		2017 or later		Never		DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	0	-6	22	-7	32	5	23	9	4	1	19	-2
	CZ	0	-1	6	-7	21	-4	34	12	26	1	13	-1
	LV	0	-4	40	-13	30	8	16	9	5	-1	9	1
	LT	0	-3	22	-6	32	2	28	7	6	-1	12	1
	HU	0	-2	10	0	19	-6	49	11	9	-1	13	-2
	PL	1	-3	12	-5	33	0	38	14	6	-2	10	-4
	RO	1	-3	15	-6	33	-3	34	12	3	-1	14	1








Q6 Dans quelle mesure estimez-vous être informé sur l'euro ? Pensez-vous être...

Q6 To what extent do you feel informed about the euro? Do you feel:

		Très bien informé(e) Very well informed		Plutôt bien informé(e) Rather well informed		Pas très bien informé(e) Not very well informed		Pas bien informé du tout(e) Not at all well informed		NSP/SR DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	7	-1	33	1	46	-1	13	1	1	0
	CZ	7	0	46	0	33	-2	11	2	3	0
	LV	3	0	36	-2	48	2	12	0	1	0
	LT	4	-1	34	5	45	-6	15	2	2	0
	HU	4	1	35	-6	48	3	11	2	2	0
	PL	5	-2	34	-2	45	4	14	0	2	0
	RO	5	-2	29	2	54	2	11	-1	1	-1








Q6 Dans quelle mesure estimez-vous être informé sur l'euro ? Pensez-vous être...

Q6 To what extent do you feel informed about the euro? Do you feel:

		Total 'Informé'		Total 'Pas informé'	
		Total 'Informed'		Total 'Not informed'	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	40	<i>0</i>	59	<i>0</i>
	CZ	53	<i>0</i>	44	<i>0</i>
	LV	39	<i>-2</i>	60	<i>2</i>
	LT	38	<i>4</i>	60	<i>-4</i>
	HU	39	<i>-5</i>	59	<i>5</i>
	PL	39	<i>-4</i>	59	<i>4</i>
	RO	34	<i>0</i>	65	<i>1</i>








Q7 Quand souhaiteriez-vous être informé de l'introduction de l'euro en (NOTRE PAYS) ?

Q7 When would you like to be informed about the introduction of euro in (OUR COUNTRY)?

		Dès que possible		Quelques années avant		Quelques mois avant		Quelques semaines avant		NSP/SR	
		As soon as possible		A few years before		A few months before		A few weeks before		DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	26	<i>1</i>	33	<i>-2</i>	29	<i>3</i>	5	<i>-3</i>	7	<i>1</i>
	CZ	17	<i>-3</i>	38	<i>3</i>	33	<i>-2</i>	7	<i>1</i>	5	<i>1</i>
	LV	25	<i>-3</i>	38	<i>5</i>	28	<i>-2</i>	5	<i>0</i>	4	<i>0</i>
	LT	21	<i>-1</i>	40	<i>1</i>	25	<i>0</i>	6	<i>1</i>	8	<i>-1</i>
	HU	16	<i>-5</i>	31	<i>1</i>	37	<i>0</i>	11	<i>3</i>	5	<i>1</i>
	PL	34	<i>-1</i>	35	<i>-2</i>	25	<i>3</i>	4	<i>1</i>	2	<i>-1</i>
	RO	30	<i>-1</i>	33	<i>1</i>	26	<i>2</i>	7	<i>-1</i>	4	<i>-1</i>

Q8 Pour chaque institution ou groupe suivant, pourriez-vous me dire si vous auriez confiance dans les informations qu'ils fournissent sur le passage à l'euro ? (ROTATION - PLUSIEURS REPONSES POSSIBLES)

Q8 For each of the following institutions or groups, please tell me if you would trust information they provide on the changeover to the euro? (ROTATE - MULTIPLE ANSWERS POSSIBLE)

		Le gouvernement, les autorités locales ou nationales		Les administrations fiscales		La banque centrale nationale		Les institutions européennes		Les banques privées	
		Government, national or regional authorities		Tax/ fiscal administrations		National Central Bank		European Institutions		Commercial banks	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	47	7	39	9	74	12	59	7	39	2
	CZ	53	-3	58	2	87	-1	57	1	63	-3
	LV	50	2	53	2	65	0	67	6	41	4
	LT	47	-2	45	-7	62	-4	64	-6	29	-1
	HU	47	2	48	5	74	3	50	-3	43	5
	PL	39	-7	34	-4	70	-2	50	-4	24	-4
	RO	41	-2	48	1	85	-1	73	0	54	-2








Q8 Pour chaque institution ou groupe suivant, pourriez-vous me dire si vous auriez confiance dans les informations qu'ils fournissent sur le passage à l'euro ? (ROTATION - PLUSIEURS REPONSES POSSIBLES)

Q8 For each of the following institutions or groups, please tell me if you would trust information they provide on the changeover to the euro? (ROTATE - MULTIPLE ANSWERS POSSIBLE)

		Les journalistes		Les syndicats, les associations professionnelles, etc.		Les associations de consommateurs		NSP/SR	
		Journalists		Trade unions, professional organisations, etc		Consumer associations		DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	32	6	25	3	40	8	7	-2
	CZ	25	2	32	1	56	1	3	0
	LV	29	-1	44	6	39	1	5	0
	LT	29	-3	30	-7	34	-4	6	0
	HU	17	3	30	3	45	5	6	-1
	PL	27	-7	27	-4	37	-4	8	1
	RO	41	2	33	2	43	5	3	0








Q9 Où serait-il le plus utile d'obtenir des informations sur l'euro et sur son introduction ? (ROTATION - PLUSIEURS REPONSES POSSIBLES)

Q9 Where would it be most useful for you to receive information about the euro and the changeover? (ROTATE - MULTIPLE ANSWERS POSSIBLE)

		Dans les banques		Dans les supermarchés et les magasins		Dans les espaces publics		Dans les écoles et autres lieux de formation et d'éducation		Sur le lieu de travail	
		In banks		In supermarkets and shops		In public places		In schools and other places of education and training		In the workplace	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	47	8	15	2	24	3	27	8	23	2
	CZ	78	2	14	1	40	-2	53	3	28	3
	LV	48	7	24	4	34	8	32	6	28	5
	LT	32	-6	14	-4	20	-4	19	-1	19	-6
	HU	41	5	11	1	17	2	23	8	21	5
	PL	40	-8	11	-3	28	-10	41	-8	21	-9
	RO	53	-10	27	-4	36	-3	49	-4	34	-7








Q9 Où serait-il le plus utile d'obtenir des informations sur l'euro et sur son introduction ? (ROTATION - PLUSIEURS REPONSES POSSIBLES)

Q9 Where would it be most useful for you to receive information about the euro and the changeover? (ROTATE - MULTIPLE ANSWERS POSSIBLE)

		A la radio		A la télévision		Dans les journaux, magazines		Dans votre boîte aux lettres		Sur Internet		NSP/SR	
		On the radio		On television		In newspapers, magazines		In your letter box		On the Internet		DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	40	9	71	3	37	4	26	5	50	7	2	0
	CZ	56	2	69	0	52	-3	39	0	68	2	2	1
	LV	56	6	76	1	54	2	46	3	69	4	0	0
	LT	38	-3	65	-3	41	-4	27	-7	52	-4	2	1
	HU	38	2	61	1	32	3	34	3	51	1	1	-1
	PL	45	-6	68	-5	42	-11	32	-7	58	-3	1	0
	RO	52	-6	78	-4	49	-7	42	-6	53	-6	1	1








Q10 Selon vous, quelles sont les principales questions sur l'euro que devrait aborder en priorité la campagne d'information à ce sujet ?
(ROTATION - PLUSIEURS REPONSES POSSIBLES)

Q10 In your view, which of the following issues about the euro are essential to be covered in priority by the information campaign?
(ROTATE - MULTIPLE ANSWERS POSSIBLE)

		La façon dont l'euro sera introduite dans (NOTRE PAYS)		La valeur d'un euro en (MONNAIE NATIONALE)		L'apparence des pièces et des billets		La façon de garantir le respect des règles de conversion monétaire vers l'euro		Les implications pratiques de l'euro concernant le salaire, le compte en banque		Les implications sociales, économiques et politiques de l'euro		NSP/SR	
		The way how the euro will be introduced in (OUR COUNTRY)		The value of one euro in (COUNTRY CURRENCY)		What notes and coins in euros look like		How to ensure that the rules for the currency conversion into euro are respected		The practical implications of the euro regarding your salary, your bank account		The social, economic or political implications of the euro		DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	69	13	71	14	54	11	64	13	67	8	68	8	5	-5
	CZ	88	-1	88	0	72	-1	84	-3	86	0	89	2	2	1
	LV	74	2	70	-2	61	5	71	3	75	0	69	1	4	1
	LT	62	-10	55	-8	28	-7	59	-13	61	-8	61	-7	5	1
	HU	64	7	70	-3	53	3	53	4	66	3	61	-3	3	-1
	PL	66	-11	71	-9	49	-9	60	-8	73	-8	71	-9	3	1
	RO	81	-2	83	2	70	-3	80	0	77	0	74	-1	3	1





Q11 Voici une liste de différentes actions de campagne d'information. Pourriez-vous me dire, pour chacune d'entre elles, si vous la considérez comme indispensable ? (ROTATION - PLUSIEURS REPONSES POSSIBLES)

Q11 Here is a list of various information campaign actions. Could you tell me for each of them whether you would find it essential? (ROTATE - MULTIPLE ANSWERS POSSIBLE)

		Le double affichage des prix dans les magasins		Le double affichage des montants sur les factures (électricité, gaz, etc.)		Le double affichage du montant sur la fiche de salaire		Des brochures / dépliants	
		Dual display of prices in shops		Dual display of the amount on bills (electricity, gas ...)		Dual display on your pay slip		Leaflets/ brochures	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	70	6	65	7	64	10	40	7
	CZ	80	-1	74	1	64	-3	49	3
	LV	87	2	81	1	75	3	46	3
	LT	77	1	66	0	54	-1	27	-4
	HU	81	3	75	3	71	3	26	5
	PL	61	-8	57	-6	55	-6	49	-1
	RO	85	4	81	2	78	3	65	2








Q11 Voici une liste de différentes actions de campagne d'information. Pourriez-vous me dire, pour chacune d'entre elles, si vous la considérez comme indispensable ? (ROTATION - PLUSIEURS REPONSES POSSIBLES)

Q11 Here is a list of various information campaign actions. Could you tell me for each of them whether you would find it essential? (ROTATE - MULTIPLE ANSWERS POSSIBLE)

		De la publicité à la télévision		De la publicité à la radio		De la publicité dans la presse		NSP/SR	
		TV advertisements		Radio advertisements		Newspaper advertisements		DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	57	6	44	9	42	7	5	-4
	CZ	52	3	44	2	52	3	4	0
	LV	58	1	51	6	47	0	3	0
	LT	68	-5	52	-3	56	-1	4	0
	HU	51	4	33	-2	29	0	2	-1
	PL	55	-8	52	-8	55	-6	6	2
	RO	77	1	66	1	66	1	2	0








Q12 Pensez-vous que l'introduction de l'euro a eu des conséquences positives ou négatives dans les pays qui l'utilisent déjà ?

Q12 Do you think the introduction of the euro has had positive or negative consequences in those countries that are using the euro already?

		Des conséquences très positives Very positive consequences		Des conséquences plutôt positives Rather positive consequences		Des conséquences plutôt négatives Rather negative consequences		Des conséquences très négatives Very negative consequences		NSP/SR DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	5	<i>0</i>	40	<i>0</i>	35	<i>3</i>	8	<i>0</i>	12	<i>-3</i>
	CZ	3	<i>1</i>	25	<i>-3</i>	48	<i>-1</i>	14	<i>-1</i>	10	<i>4</i>
	LV	1	<i>-1</i>	48	<i>-1</i>	33	<i>-1</i>	6	<i>2</i>	12	<i>1</i>
	LT	4	<i>1</i>	43	<i>3</i>	31	<i>-8</i>	8	<i>2</i>	14	<i>2</i>
	HU	4	<i>1</i>	51	<i>8</i>	24	<i>-7</i>	3	<i>-2</i>	18	<i>0</i>
	PL	3	<i>0</i>	43	<i>5</i>	32	<i>-6</i>	12	<i>-1</i>	10	<i>2</i>
	RO	11	<i>-3</i>	40	<i>1</i>	26	<i>3</i>	9	<i>-1</i>	14	<i>0</i>

Q12 Pensez-vous que l'introduction de l'euro a eu des conséquences positives ou négatives dans les pays qui l'utilisent déjà ?

Q12 Do you think the introduction of the euro has had positive or negative consequences in those countries that are using the euro already?








		Total 'Conséquences positives'		Total 'Conséquences négatives'	
		Total 'Positive consequences'		Total 'Negative consequences'	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	45	0	43	3
	CZ	28	-2	62	-2
	LV	49	-2	39	1
	LT	47	4	39	-6
	HU	55	9	27	-9
	PL	46	5	44	-7
	RO	51	-2	35	2

Q13.1 Pensez-vous que l'introduction de l'euro aurait des conséquences positives ou négatives pour... ?

(NOTRE PAYS)

Q13.1 Do you think the introduction of the euro would have positive or negative consequences for...?

[OUR COUNTRY]








		Des conséquences très positives		Des conséquences plutôt positives		Des conséquences plutôt négatives		Des conséquences très négatives		NSP/SR	
		Very positive consequences		Rather positive consequences		Rather negative consequences		Very negative consequences		DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	3	<i>-1</i>	33	<i>1</i>	40	<i>2</i>	16	<i>-1</i>	8	<i>-1</i>
	CZ	2	<i>0</i>	16	<i>-2</i>	45	<i>-2</i>	32	<i>2</i>	5	<i>2</i>
	LV	2	<i>0</i>	41	<i>-1</i>	40	<i>-1</i>	11	<i>1</i>	6	<i>1</i>
	LT	4	<i>1</i>	33	<i>0</i>	40	<i>-3</i>	15	<i>3</i>	8	<i>-1</i>
	HU	4	<i>2</i>	39	<i>2</i>	32	<i>-4</i>	12	<i>1</i>	13	<i>-1</i>
	PL	4	<i>1</i>	35	<i>2</i>	35	<i>-3</i>	20	<i>-1</i>	6	<i>1</i>
	RO	13	<i>0</i>	36	<i>0</i>	29	<i>2</i>	15	<i>-1</i>	7	<i>-1</i>

Q13.1 Pensez-vous que l'introduction de l'euro aurait des conséquences positives ou négatives pour... ?

(NOTRE PAYS)

Q13.1 Do you think the introduction of the euro would have positive or negative consequences for...?

[OUR COUNTRY]








		Total 'Conséquences positives'		Total 'Conséquences négatives'	
		Total 'Positive consequences'		Total 'Negative consequences'	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	36	<i>0</i>	56	<i>1</i>
	CZ	18	<i>-2</i>	77	<i>0</i>
	LV	43	<i>-1</i>	51	<i>0</i>
	LT	37	<i>1</i>	55	<i>0</i>
	HU	43	<i>4</i>	44	<i>-3</i>
	PL	39	<i>3</i>	55	<i>-4</i>
	RO	49	<i>0</i>	44	<i>1</i>

Q13.2 Pensez-vous que l'introduction de l'euro aurait des conséquences positives ou négatives pour... ?

Vous personnellement

Q13.2 Do you think the introduction of the euro would have positive or negative consequences for...?

For you personally








		Des conséquences très positives		Des conséquences plutôt positives		Des conséquences plutôt négatives		Des conséquences très négatives		NSP/SR	
		Very positive consequences		Rather positive consequences		Rather negative consequences		Very negative consequences		DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	4	<i>0</i>	33	<i>1</i>	38	<i>3</i>	14	<i>-2</i>	11	<i>-2</i>
	CZ	2	<i>-1</i>	19	<i>0</i>	40	<i>-5</i>	32	<i>5</i>	7	<i>1</i>
	LV	5	<i>2</i>	40	<i>-4</i>	36	<i>1</i>	8	<i>0</i>	11	<i>1</i>
	LT	5	<i>1</i>	31	<i>-1</i>	37	<i>1</i>	11	<i>1</i>	16	<i>-2</i>
	HU	5	<i>2</i>	39	<i>4</i>	29	<i>-4</i>	11	<i>1</i>	16	<i>-3</i>
	PL	4	<i>0</i>	33	<i>1</i>	37	<i>2</i>	19	<i>-1</i>	7	<i>-2</i>
	RO	14	<i>-2</i>	40	<i>3</i>	26	<i>1</i>	12	<i>-1</i>	8	<i>-1</i>

Q13.2 Pensez-vous que l'introduction de l'euro aurait des conséquences positives ou négatives pour... ?

Vous personnellement








Q13.2 Do you think the introduction of the euro would have positive or negative consequences for...?

For you personally

		Total 'Conséquences positives'		Total 'Conséquences négatives'	
		Total 'Positive consequences'		Total 'Negative consequences'	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	37	<i>1</i>	52	<i>1</i>
	CZ	21	<i>-1</i>	72	<i>0</i>
	LV	45	<i>-2</i>	44	<i>1</i>
	LT	36	<i>0</i>	48	<i>2</i>
	HU	44	<i>6</i>	40	<i>-3</i>
	PL	37	<i>1</i>	56	<i>1</i>
	RO	54	<i>1</i>	38	<i>0</i>








Q14 De façon générale, êtes-vous plutôt en favorable ou contre l'idée de l'introduction de l'euro en (NOTRE PAYS) ?

Q14 Generally speaking, are you personally more in favour or against the idea of introducing the euro in (OUR COUNTRY)?

		Très favorable à son introduction Very much in favour of its introduction		Plutôt favorable à son introduction Rather in favour of its introduction		Plutôt contre son introduction Rather against its introduction		Tout à fait contre son introduction Very much against its introduction		NSP/SR DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	9	<i>0</i>	44	<i>-3</i>	30	<i>5</i>	13	<i>-2</i>	4	<i>0</i>
	CZ	1	<i>0</i>	12	<i>0</i>	49	<i>-4</i>	32	<i>3</i>	6	<i>1</i>
	LV	9	<i>1</i>	37	<i>0</i>	34	<i>-1</i>	19	<i>0</i>	1	<i>0</i>
	LT	10	<i>1</i>	34	<i>-1</i>	31	<i>-2</i>	20	<i>0</i>	5	<i>2</i>
	HU	16	<i>5</i>	42	<i>-1</i>	22	<i>-2</i>	12	<i>0</i>	8	<i>-2</i>
	PL	10	<i>-1</i>	34	<i>0</i>	28	<i>4</i>	26	<i>-2</i>	2	<i>-1</i>
	RO	22	<i>2</i>	42	<i>-1</i>	21	<i>1</i>	9	<i>-2</i>	6	<i>0</i>








Q14 De façon générale, êtes-vous plutôt en favorable ou contre l'idée de l'introduction de l'euro en (NOTRE PAYS) ?

Q14 Generally speaking, are you personally more in favour or against the idea of introducing the euro in (OUR COUNTRY)?

		Total 'Favorable à son introduction'		Total 'Contre son introduction'	
		Total 'In favour of its introduction'		Total 'Against its introduction'	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	53	-3	43	3
	CZ	13	0	81	-1
	LV	46	1	53	-1
	LT	44	0	51	-2
	HU	58	4	34	-2
	PL	44	-1	54	2
	RO	64	1	30	-1








Q15 Quand souhaitez-vous que l'euro devienne votre monnaie ?

Q15 When would you like the euro to become your currency?

		Dès que possible As soon as possible		Après un certain temps After a certain time		Le plus tard possible As late as possible		NSP/SR DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	15	0	45	-2	35	3	5	-1
	CZ	5	2	20	-2	73	0	2	0
	LV	9	0	39	-3	49	2	3	1
	LT	14	1	39	1	41	-4	6	2
	HU	25	0	37	-1	33	1	5	0
	PL	8	-3	39	5	50	-2	3	0
	RO	36	1	33	1	27	-1	4	-1








Q16 Quel impact éventuel aura l'introduction de l'euro sur les prix en (NOTRE PAYS) ?

Q16 What impact, if any, do you think the introduction of the euro will have on prices in (OUR COUNTRY) ?

		Augmentation des prix Will increase prices		Participation à la stabilisation des prix Will help keep prices stable		Participation à la baisse des prix Will help reduce prices		Pas d'impact (NE PAS LIRE) No impact (DO NOT READ OUT)		NSP/SR DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	71	2	19	1	5	0	2	-1	3	-2
	CZ	80	2	13	-3	2	0	2	1	3	0
	LV	67	1	24	-1	3	-1	3	1	3	0
	LT	75	-5	17	4	3	0	1	0	4	1
	HU	59	-2	29	2	4	1	3	1	5	-2
	PL	81	2	15	1	1	-1	0	-2	3	0
	RO	54	1	30	-1	9	1	2	-1	5	0








Q17 Pensez-vous que l'euro... ? (PLUSIEURS REPONSES POSSIBLES)

Q17 Do you think that the euro...? (MULTIPLE ANSWERS POSSIBLE)

		Permettra de comparer facilement les prix avec les autres pays qui utilisent l'euro		Facilitera les achats dans les magasins des autres pays qui utilisent l'euro		Permettra d'économiser de l'argent grâce à l'élimination des frais de conversion monétaire dans les autres pays qui utilisent l'euro	
		Will allow you to easily compare prices with other countries that use the euro		Will make it easier to shop in other countries that use the euro		Will save money by eliminating fees of currency exchange in other countries that use the euro	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	57	<i>10</i>	61	<i>11</i>	54	9
	CZ	70	4	74	1	65	-2
	LV	64	3	72	4	61	4
	LT	52	-2	60	-6	44	-6
	HU	58	-5	63	1	59	3
	PL	56	-8	63	-4	58	-5
	RO	66	-1	71	0	63	0








Q17 Pensez-vous que l'euro... ? (PLUSIEURS REPONSES POSSIBLES)

Q17 Do you think that the euro...? (MULTIPLE ANSWERS POSSIBLE)

		Sera plus pratique pour ceux qui voyagent dans les autres pays qui utilisent l'euro		Protégera (NOTRE PAYS) des conséquences des crises internationales		NSP/SR	
		Will be more convenient for those who travel in other countries that use the euro		Will protect (OUR COUNTRY) from the effects of international crises		DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	81	16	32	3	7	-4
	CZ	88	1	14	-3	5	1
	LV	85	1	25	3	5	2
	LT	82	-3	21	-3	8	1
	HU	71	5	30	1	5	-2
	PL	78	-2	24	-2	5	1
	RO	85	2	33	-1	5	0








Q18 Selon vous, quelles affirmations, parmi les suivantes, correspondent aux effets qu'aura l'introduction de l'euro sur (NOTRE PAYS) ? (PLUSIEURS REPONSES POSSIBLES)

Q18 In your opinion, what of the following do you think the adoption of the euro will do for (OUR COUNTRY)? (MULTIPLE ANSWERS POSSIBLE)

		Garantir des taux d'intérêt bas sur la dette, moins à rembourser		Garantir des finances publiques plus saines		Améliore la croissance et l'emploi		Garantir un taux d'inflation faible	
		Will ensure lower interest rates, less debt charges		Will ensure sounder public finances		Will improve growth and employment		Will ensure low inflation rates	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	31	5	35	9	25	8	26	4
	CZ	16	1	17	-3	12	-2	19	-1
	LV	30	-1	32	1	27	-1	24	2
	LT	29	0	36	-4	23	-7	24	-4
	HU	36	-2	30	0	36	2	34	3
	PL	29	-1	23	-1	27	-1	25	-3
	RO	48	-3	44	-2	41	0	41	0

Q18 Selon vous, quelles affirmations, parmi les suivantes, correspondent aux effets qu'aura l'introduction de l'euro sur (NOTRE PAYS) ? (PLUSIEURS REPONSES POSSIBLES)

Q18 In your opinion, what of the following do you think the adoption of the euro will do for (OUR COUNTRY)? (MULTIPLE ANSWERS POSSIBLE)








		Renforcer la place de l'Europe dans le monde		Permettre de se sentir plus Européens qu'aujourd'hui		NSP/SR	
		Will reinforce the place of Europe in the world		Will make us feel more European than now		DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	41	11	48	-1	22	-1
	CZ	42	-2	30	0	39	5
	LV	53	6	49	-4	18	3
	LT	44	-5	48	-1	18	-2
	HU	43	2	37	9	15	-5
	PL	36	-8	53	-3	17	-2
	RO	59	-3	54	-2	13	-1

Q19.1 Pourriez-vous me dire si vous êtes d'accord ou pas d'accord avec chacune des affirmations suivantes...?

Le remplacement de (MONNAIE NATIONALE) par l'euro vous causerait personnellement beaucoup de désagrément

Q19.1 Could you tell me for each of the following statements if you agree or disagree...?

The replacement of the (NATIONAL CURRENCY) by the euro will cause you personally a lot of inconvenience








		Tout à fait d'accord		Plutôt d'accord		Plutôt pas d'accord		Pas du tout d'accord		NSP/SR	
		Totally agree		Tend to agree		Tend to disagree		Totally disagree		DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	23	<i>0</i>	26	<i>1</i>	17	<i>-3</i>	31	<i>3</i>	3	<i>-1</i>
	CZ	27	<i>3</i>	28	<i>-2</i>	30	<i>-1</i>	13	<i>0</i>	2	<i>0</i>
	LV	18	<i>-2</i>	28	<i>1</i>	36	<i>2</i>	17	<i>-1</i>	1	<i>0</i>
	LT	17	<i>-4</i>	26	<i>-1</i>	27	<i>1</i>	27	<i>4</i>	3	<i>0</i>
	HU	19	<i>2</i>	29	<i>2</i>	28	<i>-3</i>	19	<i>3</i>	5	<i>-4</i>
	PL	18	<i>0</i>	26	<i>2</i>	34	<i>1</i>	20	<i>-3</i>	2	<i>0</i>
	RO	26	<i>1</i>	16	<i>-1</i>	18	<i>1</i>	36	<i>-1</i>	4	<i>0</i>

Q19.1 Pourriez-vous me dire si vous êtes d'accord ou pas d'accord avec chacune des affirmations suivantes...?

Le remplacement de (MONNAIE NATIONALE) par l'euro vous causerait personnellement beaucoup de désagrément

Q19.1 Could you tell me for each of the following statements if you agree or disagree...?

The replacement of the (NATIONAL CURRENCY) by the euro will cause you personally a lot of inconvenience








		Total 'D'accord'		Total 'Pas d'accord'	
		Total 'Agree'		Total 'Disagree'	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	49	<i>1</i>	48	<i>0</i>
	CZ	55	<i>1</i>	43	<i>-1</i>
	LV	46	<i>-1</i>	53	<i>1</i>
	LT	43	<i>-5</i>	54	<i>5</i>
	HU	48	<i>4</i>	47	<i>0</i>
	PL	44	<i>2</i>	54	<i>-2</i>
	RO	42	<i>0</i>	54	<i>0</i>

Q19.2 Pourriez-vous me dire si vous êtes d'accord ou pas d'accord avec chacune des affirmations suivantes...?

Vous êtes préoccupés par une conversion abusive des prix lors du passage à l'euro

Q19.2 Could you tell me for each of the following statements if you agree or disagree...?

You are concerned about abusive price setting during the changeover








		Tout à fait d'accord		Plutôt d'accord		Plutôt pas d'accord		Pas du tout d'accord		NSP/SR	
		Totally agree		Tend to agree		Tend to disagree		Totally disagree		DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	51	<i>3</i>	28	<i>-2</i>	8	<i>1</i>	11	<i>-1</i>	2	<i>-1</i>
	CZ	43	<i>8</i>	37	<i>-5</i>	13	<i>-4</i>	5	<i>0</i>	2	<i>1</i>
	LV	52	<i>3</i>	31	<i>-3</i>	12	<i>1</i>	4	<i>-1</i>	1	<i>0</i>
	LT	43	<i>2</i>	33	<i>-2</i>	13	<i>-1</i>	8	<i>0</i>	3	<i>1</i>
	HU	27	<i>-1</i>	37	<i>-3</i>	21	<i>2</i>	11	<i>3</i>	4	<i>-1</i>
	PL	45	<i>-3</i>	34	<i>2</i>	13	<i>1</i>	7	<i>0</i>	1	<i>0</i>
	RO	46	<i>4</i>	19	<i>-5</i>	11	<i>2</i>	21	<i>1</i>	3	<i>-2</i>

Q19.2 Pourriez-vous me dire si vous êtes d'accord ou pas d'accord avec chacune des affirmations suivantes...?

Vous êtes préoccupés par une conversion abusive des prix lors du passage à l'euro

Q19.2 Could you tell me for each of the following statements if you agree or disagree...?

You are concerned about abusive price setting during the changeover








		Total 'D'accord'		Total 'Pas d'accord'	
		Total 'Agree'		Total 'Disagree'	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	79	<i>1</i>	19	<i>0</i>
	CZ	80	<i>3</i>	18	<i>-4</i>
	LV	83	<i>0</i>	16	<i>0</i>
	LT	76	<i>0</i>	21	<i>-1</i>
	HU	64	<i>-4</i>	32	<i>5</i>
	PL	79	<i>-1</i>	20	<i>1</i>
	RO	65	<i>-1</i>	32	<i>3</i>

Q19.3 Pourriez-vous me dire si vous êtes d'accord ou pas d'accord avec chacune des affirmations suivantes...?

L'adoption de l'euro impliquera que (NOTRE PAYS) perde le contrôle sur ses politiques économiques

Q19.3 Could you tell me for each of the following statements if you agree or disagree...?

Adopting the euro will mean that (OUR COUNTRY) will lose control over its economic policy








		Tout à fait d'accord		Plutôt d'accord		Plutôt pas d'accord		Pas du tout d'accord		NSP/SR	
		Totally agree		Tend to agree		Tend to disagree		Totally disagree		DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	21	4	25	-2	20	-1	26	-1	8	0
	CZ	24	2	32	2	31	-4	11	1	2	-1
	LV	24	0	33	0	30	0	11	0	2	0
	LT	14	-3	31	0	29	1	19	3	7	-1
	HU	15	1	21	-4	34	1	26	6	4	-4
	PL	18	4	22	-5	35	-1	21	1	4	1
	RO	24	2	20	0	17	0	32	1	7	-3

Q19.3 Pourriez-vous me dire si vous êtes d'accord ou pas d'accord avec chacune des affirmations suivantes...?

L'adoption de l'euro impliquera que (NOTRE PAYS) perde le contrôle sur ses politiques économiques

Q19.3 Could you tell me for each of the following statements if you agree or disagree...?

Adopting the euro will mean that (OUR COUNTRY) will lose control over its economic policy








		Total 'D'accord'		Total 'Pas d'accord'	
		Total 'Agree'		Total 'Disagree'	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	46	2	46	-2
	CZ	56	4	42	-3
	LV	57	0	41	0
	LT	45	-3	48	4
	HU	36	-3	60	7
	PL	40	-1	56	0
	RO	44	2	49	1

Q19.4 Pourriez-vous me dire si vous êtes d'accord ou pas d'accord avec chacune des affirmations suivantes...?

L'adoption de l'euro impliquera que (NOTRE PAYS) perde une partie de son identité

Q19.4 Could you tell me for each of the following statements if you agree or disagree...?

Adopting the euro will mean that (OUR COUNTRY) will lose a part of its identity








		Tout à fait d'accord		Plutôt d'accord		Plutôt pas d'accord		Pas du tout d'accord		NSP/SR	
		Totally agree		Tend to agree		Tend to disagree		Totally disagree		DK/NA	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	28	4	25	-1	13	-4	30	2	4	-1
	CZ	38	4	29	-4	21	0	11	0	1	0
	LV	38	5	30	-2	21	-2	10	-1	1	0
	LT	25	-3	30	1	21	-2	19	3	5	1
	HU	17	4	21	-4	28	-3	29	6	5	-3
	PL	19	-5	23	0	28	1	29	5	1	-1
	RO	26	2	17	0	18	2	35	-1	4	-3

Q19.4 Pourriez-vous me dire si vous êtes d'accord ou pas d'accord avec chacune des affirmations suivantes...?

L'adoption de l'euro impliquera que (NOTRE PAYS) perde une partie de son identité

Q19.4 Could you tell me for each of the following statements if you agree or disagree...?

Adopting the euro will mean that (OUR COUNTRY) will lose a part of its identity

		Total 'D'accord'		Total 'Pas d'accord'	
		Total 'Agree'		Total 'Disagree'	
		EB 34.9	Diff. EB 33.6	EB 34.9	Diff. EB 33.6
	BG	53	3	43	-2
	CZ	67	0	32	0
	LV	68	3	31	-3
	LT	55	-2	40	1
	HU	38	0	57	3
	PL	42	-5	57	6
	RO	43	2	53	1