

Reflection Paper

Preparation and analysis of Eurobarometer on social exclusion¹

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I. Overview: Special Eurobarometer surveys and reports on poverty and exclusion

Special Eurobarometer surveys on poverty and social exclusion have been conducted (and the reports published) in 1976 (published in 1977), 1989 (1990), 1993 (1994), 2001 (2002), and 2007 (2007). A survey on “European Social Reality” in 2006 (published in 2007) contains a section on poverty and social exclusion².

Evolution of surveys over time

Helene Riffault, of the French Institute of Public Opinion (L'IFOP) and Jean-Rene Rabier of the European Commission carried out the first of these in 1976. Entitled in French *La perception de la misère en Europe*, (in English, *The Perception of Poverty in Europe*), this was in many ways a landmark study exploring the subjective perception of poverty, the extent of deprivation in terms of living conditions and public understandings of the causes of poverty (Riffault and Rabier, 1977). It flowed from a tradition of work that had been centrally concerned with changes in social values.

There was then a considerable gap before the second survey – *The Perception of Poverty in Europe 1989* – was carried out as part of the Poverty 3 Programme, focusing primarily on people's experiences of their living conditions.

In 1993, a third survey was carried out, in the context of a growing interest in the problem of social exclusion. The title of the report, '*La perception de la pauvreté et de l'exclusion sociale*' (Riffault, 1994) captured its transitional position between two rather different conceptual currents.

¹ This Reflection paper has been produced for the European Commission by the Social Inclusion and Income Distribution network of the European Observatory on the Social Situation and Demography. The views expressed are those of the authors and do not necessarily represent those of the European Commission.

² The Perception of Poverty in Europe 1976 (published in 1977); The Perception of Poverty in Europe 1989 (published in 1990); The Perception of Poverty and Social Exclusion in Europe, 1993 (published in 1994); Social Precariousness and Social Integration 2001 (published in 2002); European Social Reality 2006 (published in 2007); and Poverty and Exclusion 2007 (published in 2007). See Annex for details of these.

Contrary to earlier surveys describing the conditions of groups that had already become separated from the mainstream of society, the fourth survey, *Social Precariousness and Social Integration 2001* (Gallie and Paugam 2002) was concerned about the risk of marginalisation in the longer-term. The report focused on two major dimensions of social precariousness— precariousness of living conditions and precariousness of work conditions.

It therefore provided comparisons over time with a wider range of indicators than any of the earlier surveys, particularly in relation to work experience. To achieve this, the study built upon an earlier survey carried out in 1996 by DG Employment, which focused primarily on precarious working conditions and unemployment (Gallie, 1997).

The most recent survey *Poverty and Exclusion 2007*, provides a snapshot cross-country analysis on (1) the perceived existence of poverty and attitudes towards poverty, (2) homelessness, (3) what Europeans regard as necessary in order to have a decent standard of living with regard to financial means, housing needs, ownership of durable goods, basic necessities and social integration. The comparability of some of these questions with the 2001 survey allows us to present changes over time (see below).

The profile of the *European Social Reality 2006* survey is somewhat different, in addition to poverty and social exclusion, it also covers immigration, evaluations of social welfare systems (pensions in particular), and a series of subjective questions on well-being, such as on personal happiness, satisfaction with life, and perceptions of family life, work, leisure time, voluntary work and politics.

Comparability over time

The existence of these earlier surveys is clearly crucial in opening up the opportunity for comparison across time. At the same time the shifts in focus and method impose inherent constraints on what can be achieved in terms of charting trends. With respect to living conditions, it was possible in certain instances to provide analyses of trends as far back as 1976, in others only from 1989. With respect to the precariousness of work, evidence is necessarily confined to the shorter period of the second half of the 1990s.

It must also be borne in mind that in earlier surveys, the importance of consistency in wording and question format was not always fully taken into account, with apparently random changes in phrasing or in the options listed often undermining the opportunity for rigorous comparison across the full set of years. The approach of Gallie and Paugam (2002) was to confine themselves to indicators where the exact equivalents existed in different years, rather than to modify non-consistent variables in an attempt to make them comparable.

II. Special Eurobarometer – social precariousness and social integration 2001(2002): objectives and main findings

The objective of this report was to chart trends in social precariousness in the EU Member States. The report focused on two major dimensions of social precariousness – precariousness of living conditions and precariousness of working conditions.

With respect to living conditions, a crucial factor that heightens precariousness is clearly inadequacy of financial resources. This involves not only the current level of income but also the duration of time over which people have experienced financial deprivation.

The second major dimension of precariousness examined was that of the precariousness of work – since the nature of people's jobs has been shown consistently to be a central factor affecting their long-term risks of unemployment, poverty and ill-health.

The report addressed three issues.

- 1) Has precariousness of living and work conditions been increasing or not in the countries of the European Union, and if, so which dimensions of precariousness have changed most?
- 2) Has the process been relatively consistent across countries or have there been marked variations in trends reflecting different institutional systems?
- 3) What are the implications of precariousness for social integration, both in terms of people's personal sense of integration in society and in terms of their attitudes to the institutional framework of society?

The evolution and perception of poverty

A measure of subjective poverty (based on whether people's total net income is lower than the amount they judge absolutely necessary) showed that the proportion of individuals in poor households was greatest in Southern Europe (especially Portugal, Greece and Italy), and in Ireland. The inter-country differences were more marked than those that emerge from relative (and less subjective) poverty indicators. For instance, 66% of individuals in Portugal were poor on the subjective measure compared with only 9% in Denmark – the country with the lowest level of subjective poverty.

There were also strong inter-country variations in perceptions of the causes of poverty. The proportions that viewed poverty as the result of the characteristics of individuals were highest in Portugal (48%), Denmark (47%), the UK (43%) and Ireland (41%). In contrast, social explanations of poverty were predominant in Sweden and East Germany (69%), Finland (66%), France and West Germany (59%).

Perceptions of poverty seem to be strongly affected by the economic cycle. In the majority of the northern and central countries in the EU (as well as in Spain), there was a marked decline of explanations in terms of individual laziness between 1989 and 1993 as economic conditions deteriorated, followed by an increase between 1993 and 2001 when economic conditions improved. Conversely, in most countries (9 out of 11) explanations in terms of social injustice were most frequent in 1993, and had declined by 2001. The analysis indicated that unemployment levels were a strong predictor of people's perceptions of the causes of poverty.

Those in the Southern countries of the EU were notably more likely to view poverty as an inherited condition: 53% of people in Greece and Portugal and 46% in Italy and Spain believed that those who were poor had always been in the same situation. In contrast, with the exception of Ireland and the UK, the most common view in the Northern and Central countries of the EU was that people fell into poverty after some unfavourable life event.

The experience of poverty

There was a general reduction between 1993 and 2001 in the proportion of people directly experiencing financial difficulty. The only exceptions were Portugal and the Netherlands. Moreover, the level of financial difficulty experienced remained very high in Greece and Portugal where it affected more than 50% of the population.

There were considerable country variations in the proportion of people experiencing financial difficulty among those with low incomes, ranging from around a quarter of those in the lowest income quartile in Denmark to around 80% in Greece and Portugal.

While there was a reduction or little change in the proportion experiencing difficulty in meeting housing expenses for people in general in most countries, it was notable that there was an increase in most countries in the proportion in the lowest income quartile.

There were marked differences in the duration of poverty between northern and southern countries. In the former the majority of those affected by poverty reported a duration of two or three years, whereas in the latter, the duration tended to be around 14 or 15 years. This points to the conjunctural nature of poverty in the northern countries and the structural nature in southern countries.

Table 1. Risk of poverty rate and subjective poverty measures in 2001 and 2007

	2001		2007		
	Risk of poverty, %	Subjective poverty, %	Risk of poverty, %	Subjective poverty, %	% with financial difficulties
BE	13	32	15	27	14
BG			15	80	70
CZ			10	36	30
DK	10	9	12	8	3
DE	11	14	13	20	15
EE			18	51	31
EL	20	54	20	55	51
ES	19	34	20	37	27
FR	13	30	13	34	27
IE	21	24	20	19	17
IT	19	41	19	51	26
CY			16	47	43
LT			21	57	29
LV			19	79	45
LU	12	8	13	7	7
HU			13	84	35
MT			15	21	30
NL	11	18	11	12	4
AT	12	16	12	21	13
PL			21	63	21
PT	20	66	20	47	39
RO			18	82	46
SI			10	48	13
SK			13	62	38
FI	11	30	12	18	9
SE	9	20	9	10	7
UK	28	27	19	20	16
EU 27				38	24
EU15			16	30	21
NMS12				67	33
HR			18	75	26

Source: Eurostat NewCronos database; Special Eurobarometer 2001 and 2007

Note: Risk of poverty rate is the proportion of people with equivalised disposable income below 60% of the national median. The probability of people experiencing financial difficulties was considerably greater among those who spent their childhood in an economically disadvantaged family. This was particularly strong in the southern countries.

The proportion reporting being able to rely on others in situations of personal difficulty increased in most European countries between 1996 and 2001. However, in all countries other than Italy, it declined over the same period for the poorest income quartile.

In the Southern countries, with the exception of Portugal, the frequency of social contact tended to be higher for those with low incomes than for those with higher levels, while the reverse was the case in the northern countries.

However, subjective social isolation was greater for those with low incomes in all countries, while there latter were also more likely to feel that others did not value them. Equally, those who were unemployed did not have less frequent contact with other people than those in work, but they felt significantly more isolated. This was also the case even for those with relatively high levels of income. The feeling of social isolation also tended to be more prevalent among those living in cities and large towns than among those living in other places.

Precariousness of work

The results indicate that there was no improvement in the perceived quality of jobs over the period but instead it seems to have deteriorated. There was also, however, no evidence of an intensification of pressure at work.

Less than a third of employees in 2001 reported being in high quality jobs with opportunity for self-development and control over the tasks performed and there was an overall decline in the proportion reporting being in such jobs between 1996 and 2001.

More women reported being in jobs of poor quality than men in both 1996 and 2001. In addition, more people in Denmark, Finland and Sweden than in other countries reported being in high quality jobs in the two years. On the other hand, more people in Sweden as well as in the UK reported working under relatively high pressure than elsewhere, whereas the reverse was the case in the Netherlands and Luxembourg.

Pressure at work was highly correlated with skill levels, those in more skilled occupations reporting high levels of pressure than those in lower skilled ones. However, there was no change between 1996 and 2001 in the proportion of people in different occupations reporting experiencing high pressure.

Social precariousness and attitudes to society and the welfare state

Critical attitudes to social policy are most frequent in countries where state welfare policies are relatively underdeveloped (especially those in Southern Europe). Support for social policy is also particularly strong among the unemployed and those with low income.

Favourable attitudes towards social solidarity are indicated by a willingness to pay higher taxes if these are used to improve the situation of those on low incomes. This is especially the case in Denmark, Great Britain, Sweden, Luxembourg, Italy and Spain.

III. Special Eurobarometer - Poverty and Exclusion (2007): Objectives and main findings

The survey focused on the perceptions of poverty in the European Union. The first part examined the extent of poverty in different countries, how far respondents were conscious of poverty in the area in which they live and what they regarded as the underlying causes. The second part focused on homelessness, perhaps the most extreme form of social exclusion, while the third part investigated what people considered necessary in order to have a decent standard of living.

Subjective poverty

The survey was based on two measures of subjective poverty, the first where income is less than what people consider to be absolutely necessary for a proper standard of living, the second where people report having financial difficulties. The results indicate that the proportion of people reporting being poor on these subjective measures is much higher than the proportion recorded as having income below the poverty line as conventionally defined in most Member States. The only exceptions were Sweden, the Netherlands, Denmark and Luxemburg.

This proportion was higher in 2007 than in 2001 in some countries (Austria, France, Germany, Greece Italy and Spain) and lower in others (Finland, Portugal and Sweden).

Perceptions of poverty

According to the survey, people in the EU considered that 10% of the people in the area in which they lived were in extreme poverty and almost 30% were in poverty, while a further 30% were considered to be at risk of falling into poverty. These figures, as might be expected were highest in the new Member States – around twice as high as in EU15 countries. In the latter, however, the figures were significantly higher in 2007 than in 2001 (32% being regarded as living in poverty as against 20% six years earlier).

Less than a third of respondents felt that people living in poverty had always been in the same situation, while 59% believed that they fallen into poverty from having known something better. Most people in EU Member States, except for Ireland, regarded poverty as an acquired condition, though the proportion concerned varied across countries, being particularly high (78% or higher) in the former DDR, Latvia and Estonia. The view that people had always been in poverty was most prevalent in Portugal (45%), Ireland and the UK (41% in both).

As compared with 2001, a larger proportion of people in EU15 countries in 2007 regarded poverty as being an acquired condition, though this was not the case in the Netherlands, Austria, Finland and Sweden.

Causes of poverty

Some 37% of people in the EU believe that injustice is the main cause of poverty, 20% that it is laziness or the lack of willpower and 19%, that it is bad luck, while 13% considered poverty to be an inevitable part of progress. People's views on this seem to be heavily influenced by their own situation. People who consider themselves poor are more likely to believe that poverty is caused by injustice in society, while those who report not having financial problems are inclined to see poverty as an inevitable part of progress or to blame it on

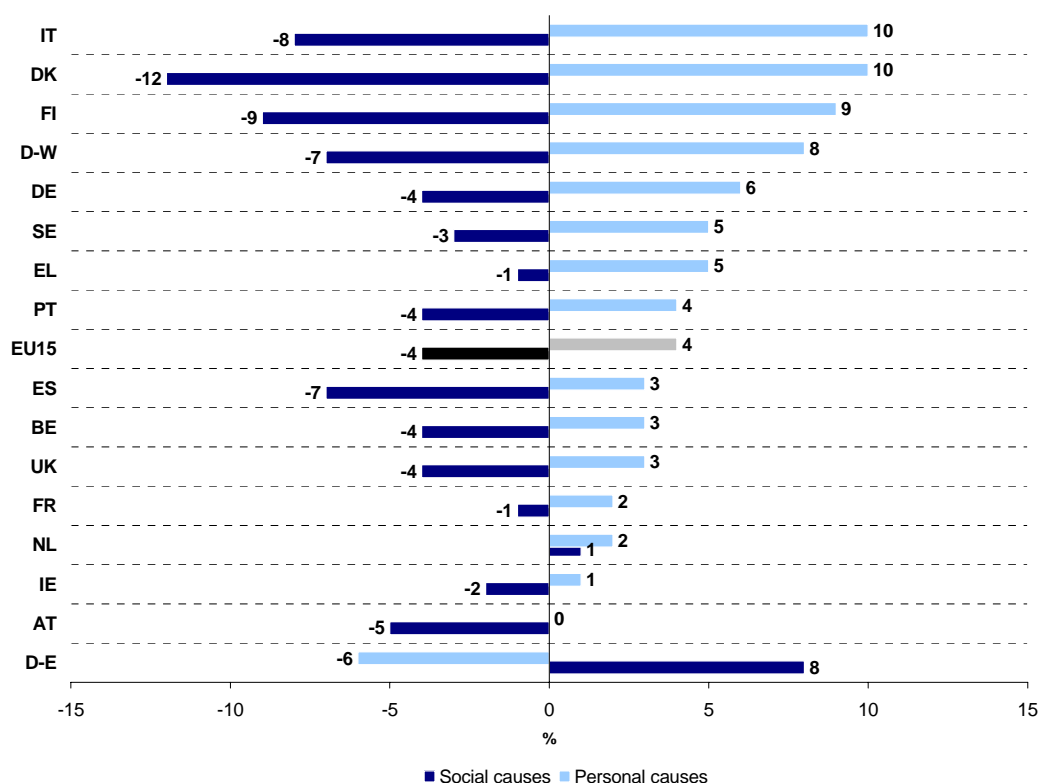
laziness or a lack of willpower. In addition, those who believe that poverty is an inherited condition are more likely to see laziness as the primary cause than those who regard it as an acquired condition, who are more likely to believe it is caused by social injustice (49%).

The view that social injustice is the main cause of poverty is most widely held in East Germany (65%), Bulgaria (59%), Croatia (57%) and Hungary (56%). In contrast, the proportion of people regarding laziness as the main cause is highest in Lithuania (39%), Latvia, Malta (36% in both) and the Czech Republic (34%). Although the figures for the latter are lower in EU15 countries, they were higher in many cases in 2007 than in 2001.

At the same time, the proportion of people considering that poverty is caused by long-term unemployment (35%), low paid jobs (34%) and inadequate levels of social benefits or pensions (33%) was also relatively high. Addiction (29%) and a lack of education (23%) are considered major causes by respondents who do not report being poor themselves. In Denmark, Estonia and Finland, 57-60% of people believed that addiction was a primary cause, in Greece (68%), Bulgaria (61%) and Romania (59%), a substantial proportion of people pointed to low benefits, and in the Netherlands (44%) to long-term illness or disability. In Sweden, significantly more people than in other countries mentioned discrimination as an important cause (24% as against 9%) and in France, a lack of affordable housing (22% as against 8%).

Figure 1 An increased proportion of people see personal rather societal factors as main causes of poverty

*Shifts in the perceived causes of poverty between 2001 and 2007
(percentage point changes)*



IV. Suggestions for questions to be included in a regular survey

The following questions are taken from previous Eurobarometers and accordingly would provide a means of identifying changes over time.

1. In your opinion, what would be the very lowest net monthly income that your household would need to have in order to make ends meet, given the present circumstances and composition of your household? (Net income is after tax and social security contributions have been deducted)
2. Is the total net monthly income of your household higher, lower or more or less the same as this figure?
 - Much higher
 - Higher
 - More or less the same
 - Lower
 - Much lower
 - Don't know
3. Which of the following best describes how your household is keeping up with all its bills and credit commitments at present?
 - I am\ we are keeping up without any difficulties
 - I am\ we are keeping up but struggle to do so from time to time
 - I am\ we are keeping up but it is a constant struggle
 - I am\ we are falling behind with some bills and credit commitments
 - I am\ we are having real financial problems and have fallen behind with many bills and credit commitments
 - Don't know
4. In the area where you live, are there people who live in one or the other of the following situations?

A great many Many Some None or hardly any

Situation of extreme poverty

Situation of poverty

At risk of falling into poverty

Don't know

(The following questions to be asked if in answer to previous question people are thought to be living in poverty or at risk of poverty)

5. Do you ever happen to see for yourself the conditions in which these people really live?

(If yes) Do you see these conditions often, sometimes or rarely?

- Yes, often
- Yes, sometimes
- Yes, rarely
- No, never
- Don't know

6. Would you say that, for the most part, these people:

- Have always been in their present situation?
- Have fallen into it after knowing something better?
- Don't know

7. Why in your opinion are there people who live in poverty? Which of the following 4 views is closest to yours?

- Because they have been unlucky
- Because of laziness and lack of willpower
- Because there is much injustice in our society
- It's an inevitable part of progress
- None of these
- Don't know

8. Which three of the following reasons best explain why people are poor or excluded from our society? (maximum of 3 answers)

- Social benefits and pensions are not high enough
- There is a lack of concern from people around them
- They suffer from a long term illness or disability
- They have been through a family break-up or lost a family member
- Their current work doesn't pay enough
- They suffer from alcoholism, drug abuse or other addictions
- They have been unemployed for a long time (M)

- They live in a poor area
- They have too many children
- They lack education
- They don't do enough to get by
- Their parents were poor
- They suffer from discrimination based on ethnic origin, age, disability or sexual orientation
- They cannot access affordable housing
- Don't know

Additional questions:

A.1. Who should be responsible for taking people out of poverty?

Mainly To some extent Not at all

The Government

Their families

The individuals themselves

A.2. What are the main measures which should be adopted to reduce the number of people living in poverty?

Increased benefit levels

Help for them to find work

Withdrawal of benefits to persuade them to find work

V. References

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Annex. Country coverage and sample size of previous surveys

1. *Poverty and Exclusion 2007(2007)*

Eurobarometer 67.1

Countries include: EU27 + Croatia. Total sample: 27.466. The sample is representative of the total population aged 15 years and over.

The methodology used is that of the Standard Eurobarometer surveys of the Directorate-General Communication ("Public Opinion and Media Monitoring" Unit). A technical note concerning the interviews, carried out by the institutes of the TNS Opinion & Social network, is annexed to the report.

1. European Social Reality 2006(2007)
Eurobarometer 66.3

Countries include: EU25 + Bulgaria and Romania (not yet members at the time of the survey). Total sample: 26.755.

2. *Social Precariousness and Social Integration 2001(2002)*

Eurobarometer 56.1

Countries include: EU15. Total sample: 15.805.

3. *The Perception of Poverty and Social Exclusion in Europe 1993(1994)*

Eurobarometer 40

Countries include: Belgium, Denmark, Germany, Greece, Finland, France, Ireland, Italy, Luxemburg, the Netherlands, the UK, Spain, Portugal and Finland.

4. *The Perception of Poverty in Europe 1989(1990)*

Countries include: Belgium, Denmark, Germany, France, Ireland, Italy, Luxemburg, the Netherlands, the UK, Greece, Spain, and Portugal.

Total sample: 11.819. Respondents are chosen randomly (DK, NL, LU), by quota sampling (BE, FR, IT, UK, IE), or by a combination of the two ("random route") (DE, GR, ES, P).

5. *The Perception of Poverty in Europe 1976(1977)*

Eurobarometer 5

Countries include: Belgium, Denmark, Germany, France, Ireland, Italy, Luxemburg, the Netherlands, and the UK. Respondents are chosen either randomly (BE, DK, NL, LU) or by quota sampling (FR, IT, UK, IE, DE).