

Confidence Study

Overview of results for ten European countries, May 2008

INSURANCE | ASSET MANAGEMENT | BANKING



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Study design

| | |
|--------------------------|---|
| Method: | CATI (Computer-assisted telephone interviews) |
| Countries: | Austria, Croatia, France, Germany, Greece, Italy, Portugal, Russia, Spain, Turkey |
| Target group: | Country populations, males and females aged 15+ |
| Sample: | Representative sample of the population in each country, n=1,000 interviews* |
| Field time: | April - May 2008 |
| Research partner: | GfK Market Research** |

* Russia: n=1,665 interviews, aged 18+

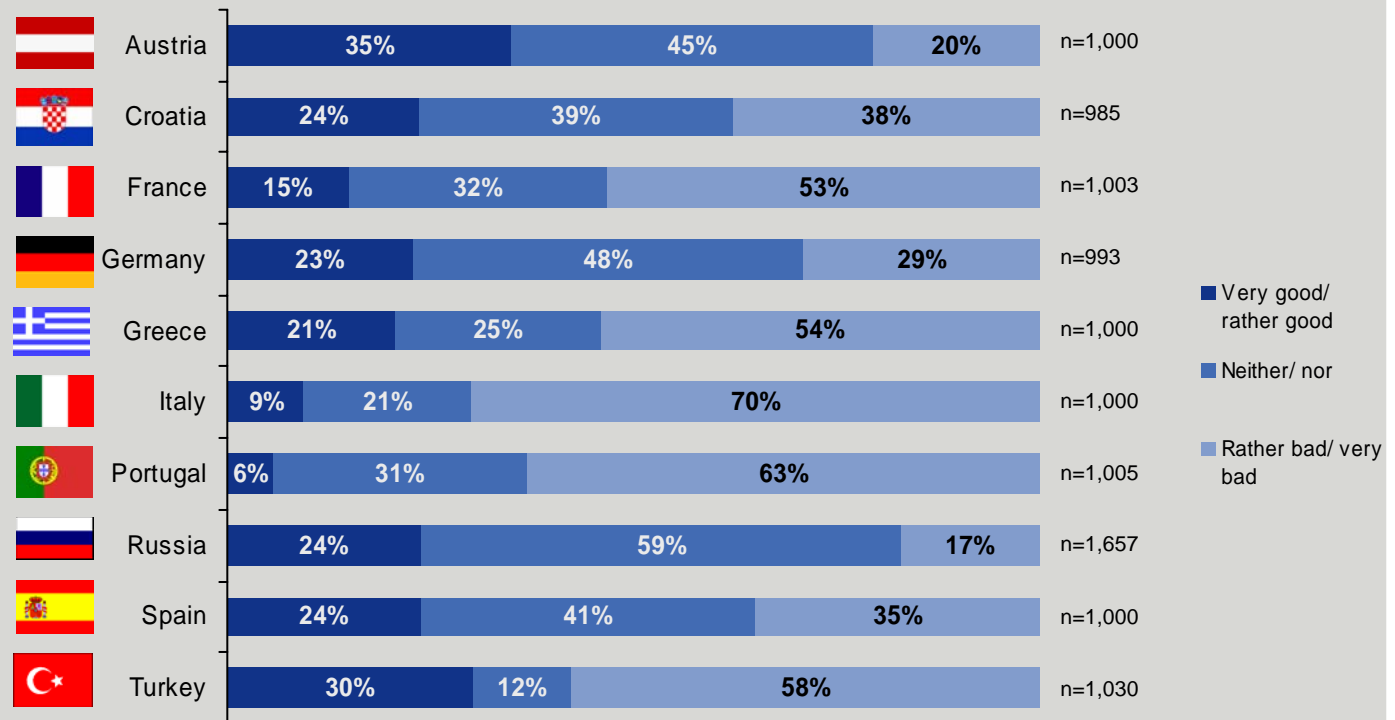
** excluding Croatia, Germany and Russia

Contents

- Study design
- **Results**

Austrians and Turks evaluate the current overall situation in their countries most positively.

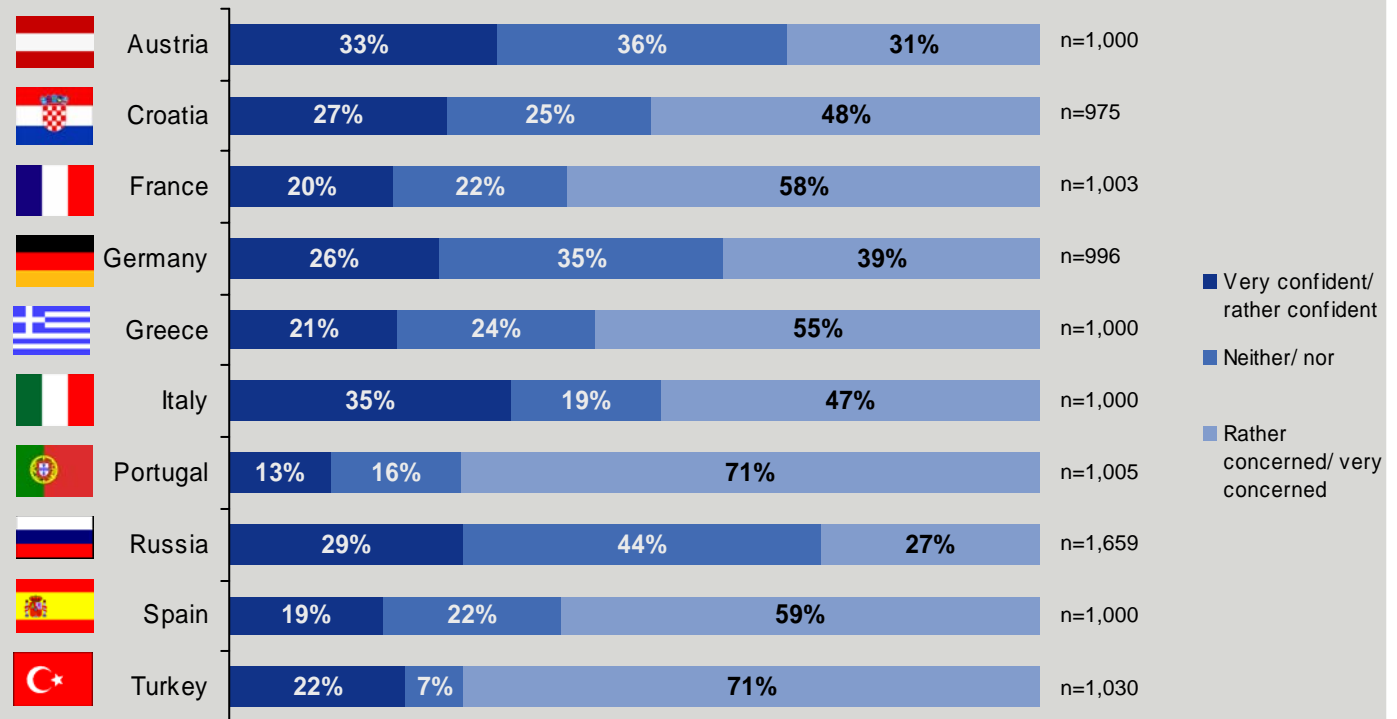
Current view – overall situation in the country



Question 1: What is your current view – all in all – of the following situations? Is the situation very good, rather good, neither / nor, rather bad or very bad?
Basis: Total without d.k./n.a.

Italians and Austrians are most confident about the future of their countries.

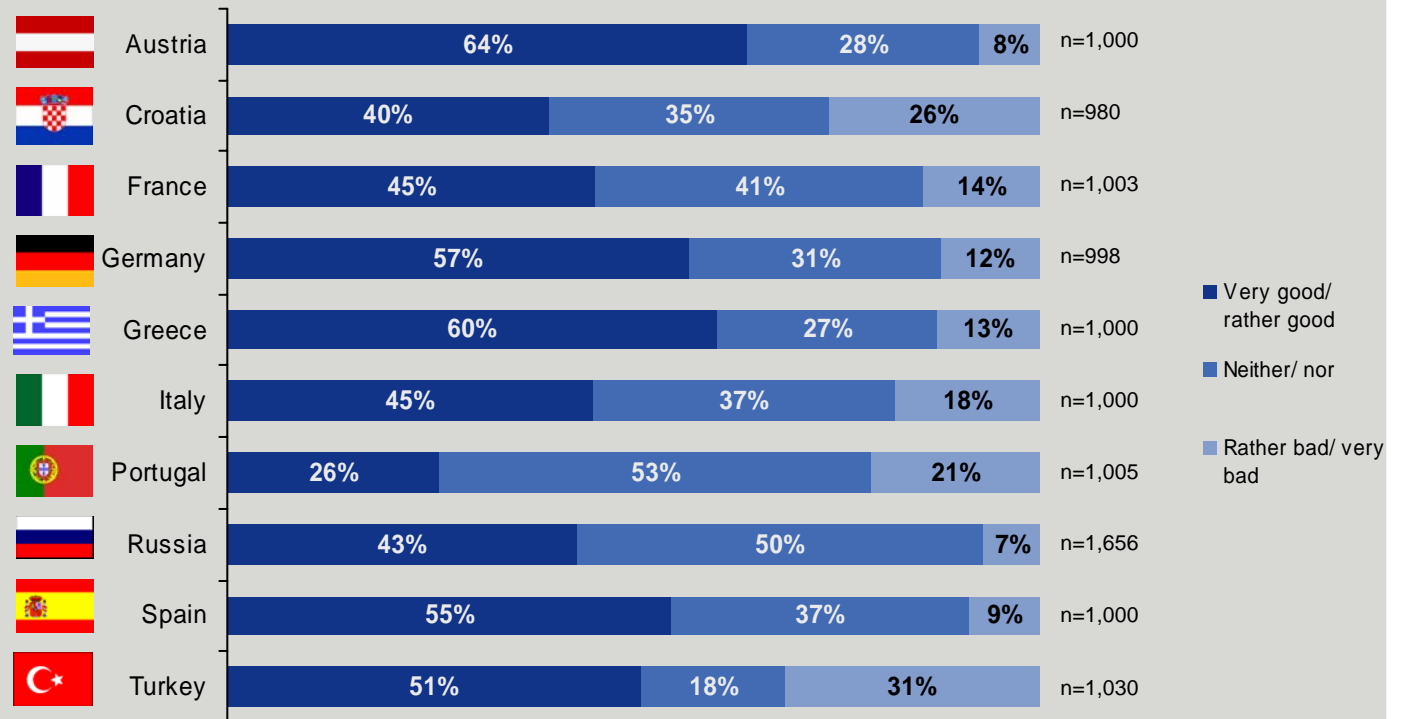
Situation over the next 12 months – overall situation in the country



Question 2: If you think about the following situations: Is your view over the next 12 months very confident, rather confident, neither / nor, rather concerned or very concerned?
Basis: Total without d.k./n.a.

More than half of Austrians, Greeks, Germans, Spaniards and Turks are happy with their current personal situation.

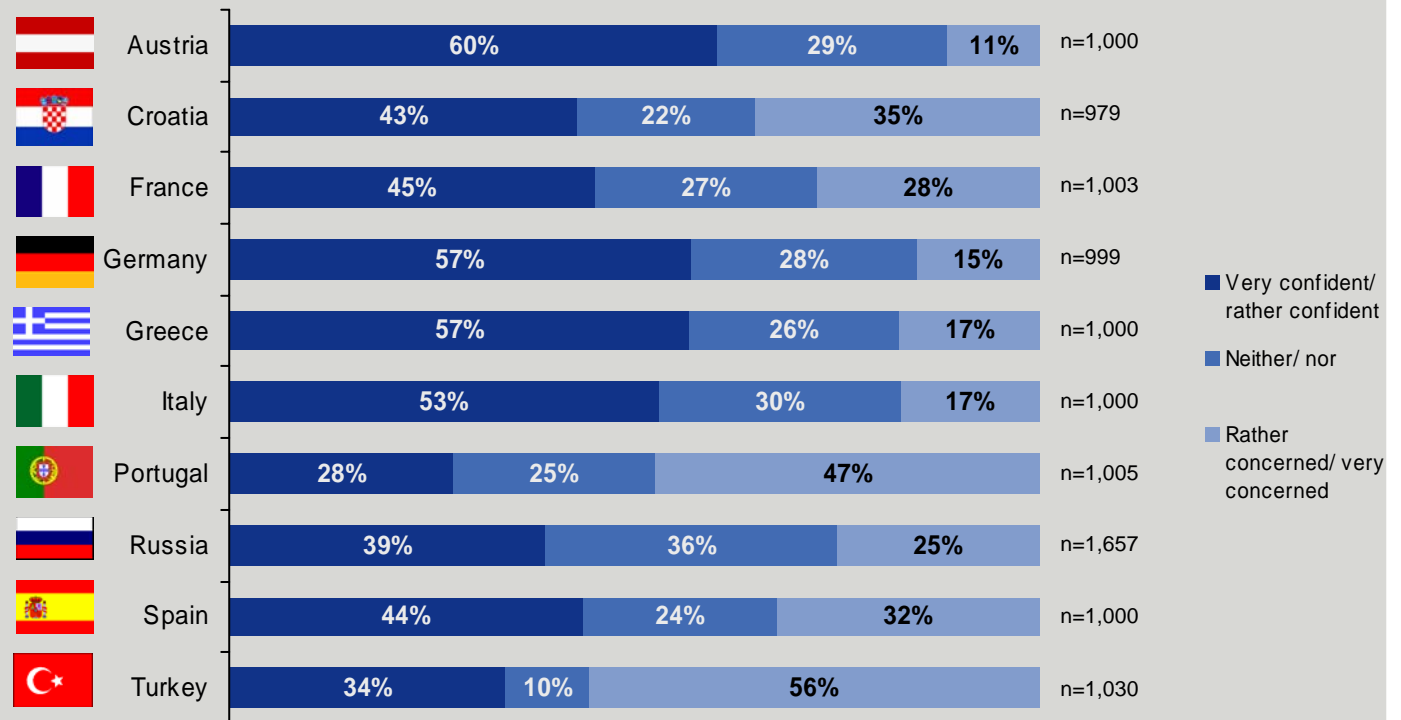
Current view – personal situation



Question 1: What is your current view – all in all – of the following situations? Is the situation very good, rather good, neither / nor, rather bad or very bad?
Basis: Total without d.k./n.a.

Austrians, Germans, Greeks and Italians are most confident regarding their future personal situation.

Situation over the next 12 months – personal situation



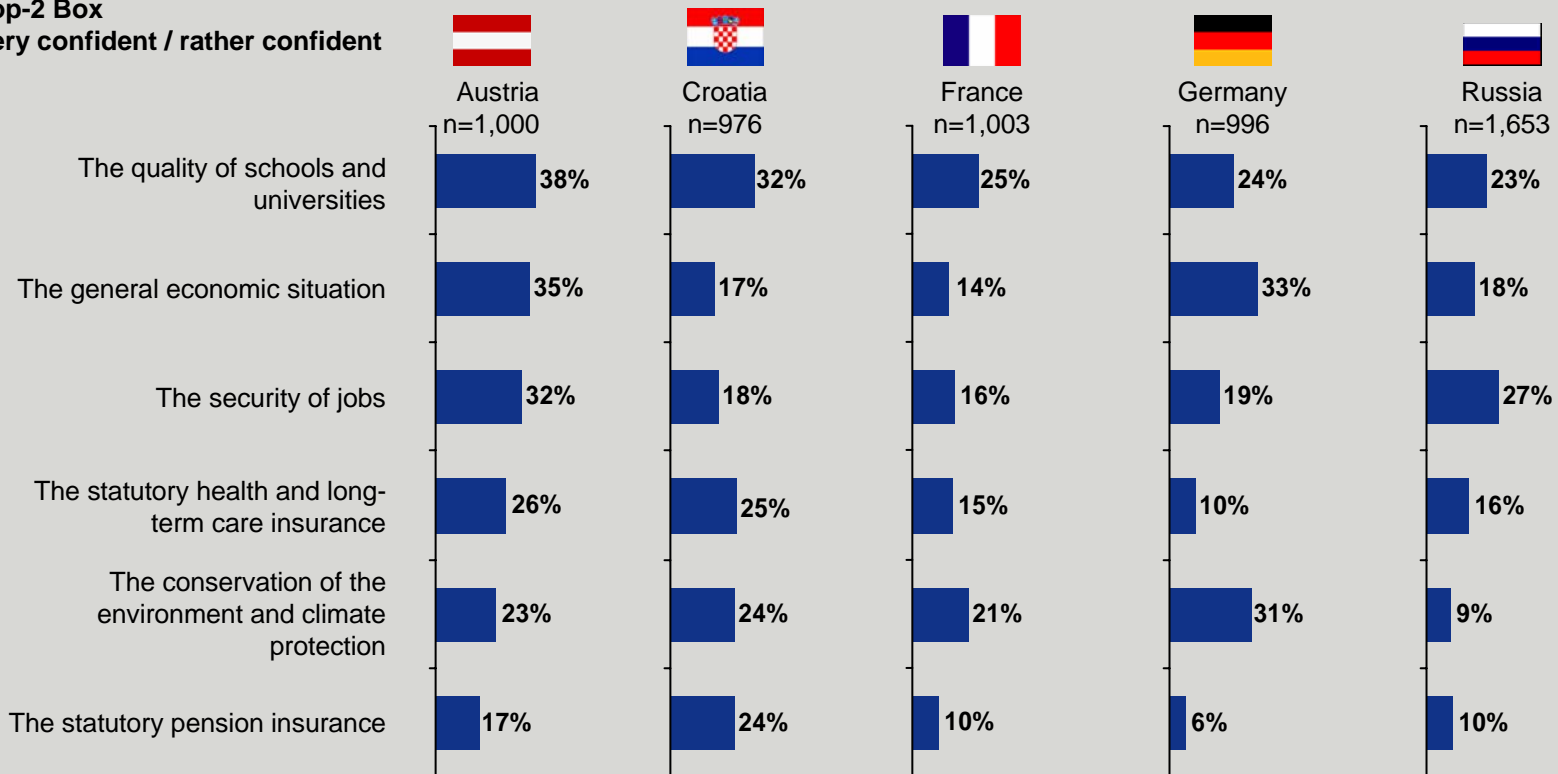
Question 2: If you think about the following situations: Is your view over the next 12 months very confident, rather confident, neither / nor, rather concerned or very concerned?
Basis: Total without d.k./n.a.

Regarding important issues that play a role for the future of a country, respondents generally don't feel very confident.

Attitudes towards issues that play a role for the future in ...

Top-2 Box

Very confident / rather confident



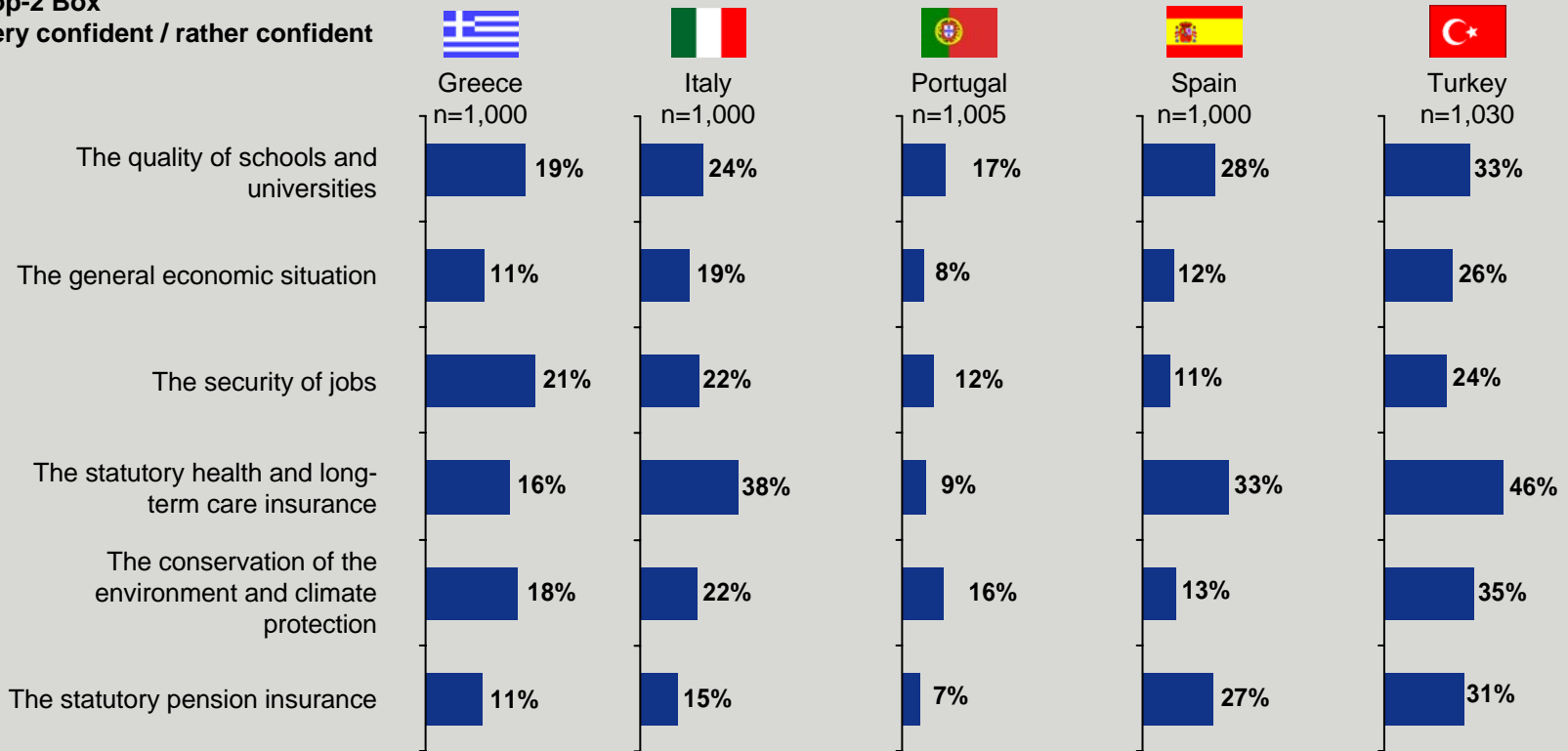
Question 3a: I will read you some statements about issues that may play a role for the future in Please tell me for each of these issues whether your view of them over the next 12 months is very confident, rather confident, neither / nor, rather concerned or very concerned? Basis: Total without d.k./n.a.

People in Portugal feel least confident regarding the future of their country.

Attitudes towards issues that play a role for the future in ...

Top-2 Box

Very confident / rather confident



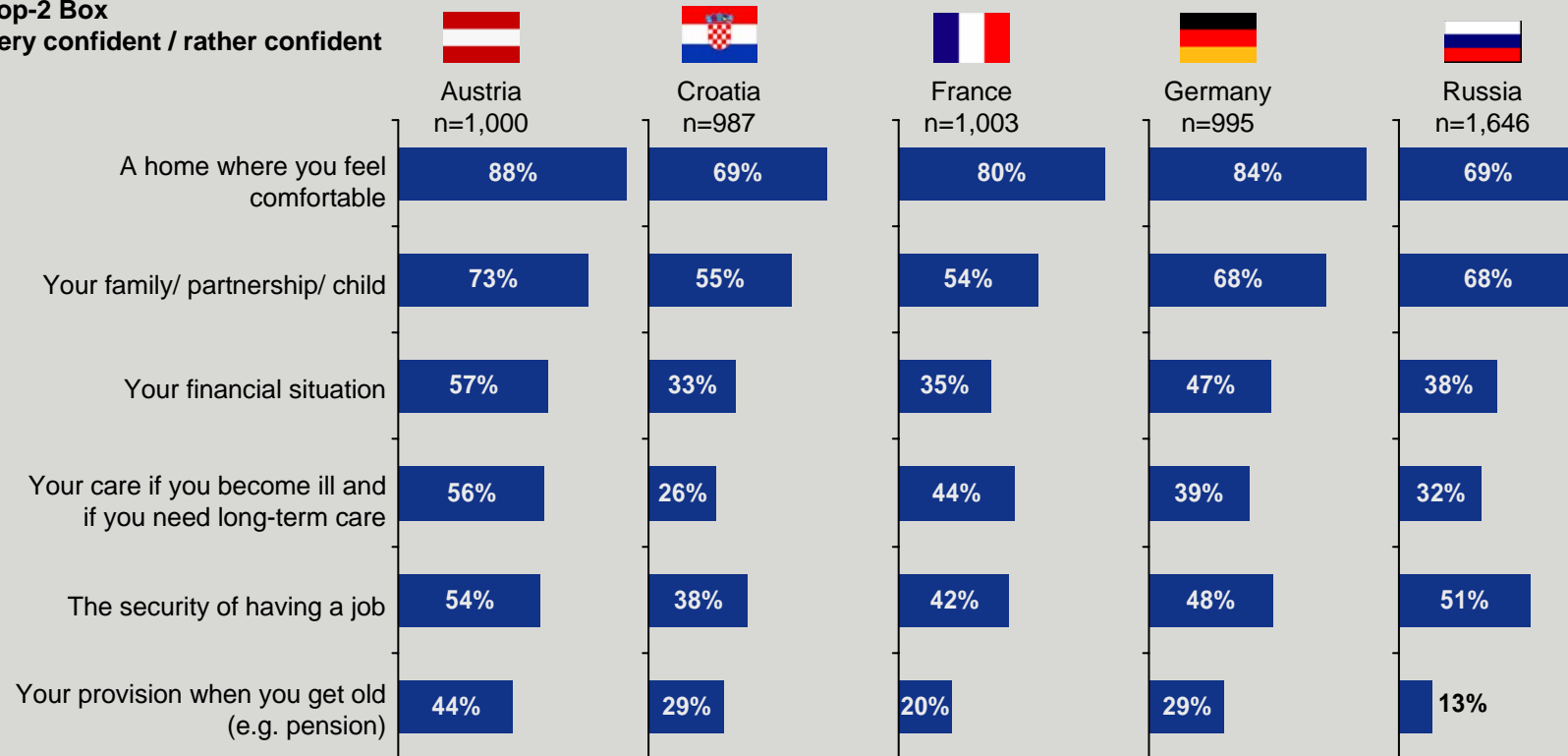
Question 3a: I will read you some statements about issues that may play a role for the future in Please tell me for each of these issues whether your view of them over the next 12 months is very confident, rather confident, neither / nor, rather concerned or very concerned? Basis: Total without d.k./n.a.

Regarding important issues that play a role in the future personal situation, Austrians are most confident, followed by Germans.

Attitudes towards the personal situation

Top-2 Box

Very confident / rather confident



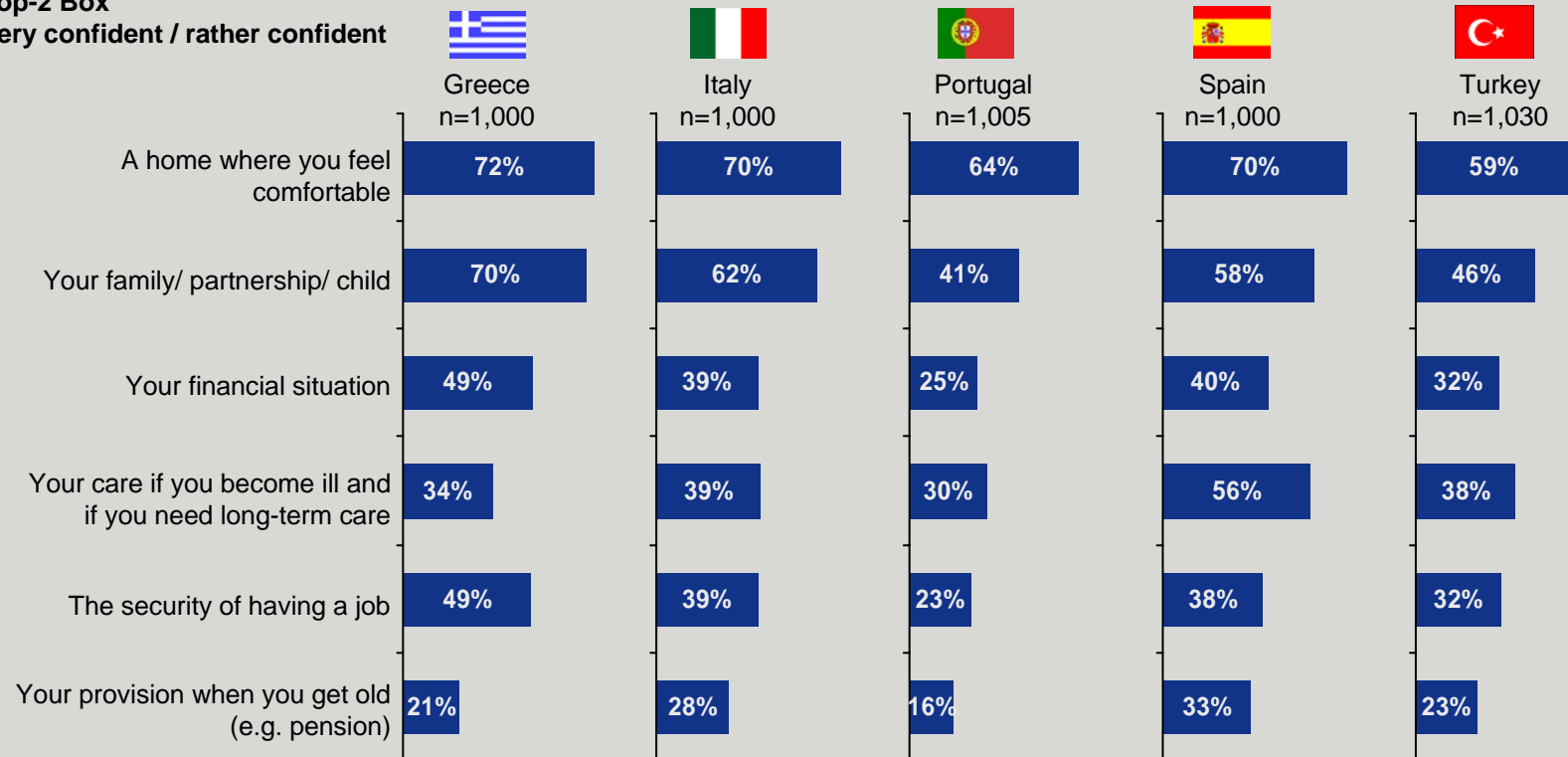
Question 3b: I will now read you some statements about issues that may play a role in your own life. Please tell me for each of these issues whether your view of them over the next 12 months is very confident, rather confident, neither / nor, rather concerned or very concerned? Basis: Total without d.k./n.a.

People in all countries are concerned about old age provision.

Attitudes towards the personal situation

Top-2 Box

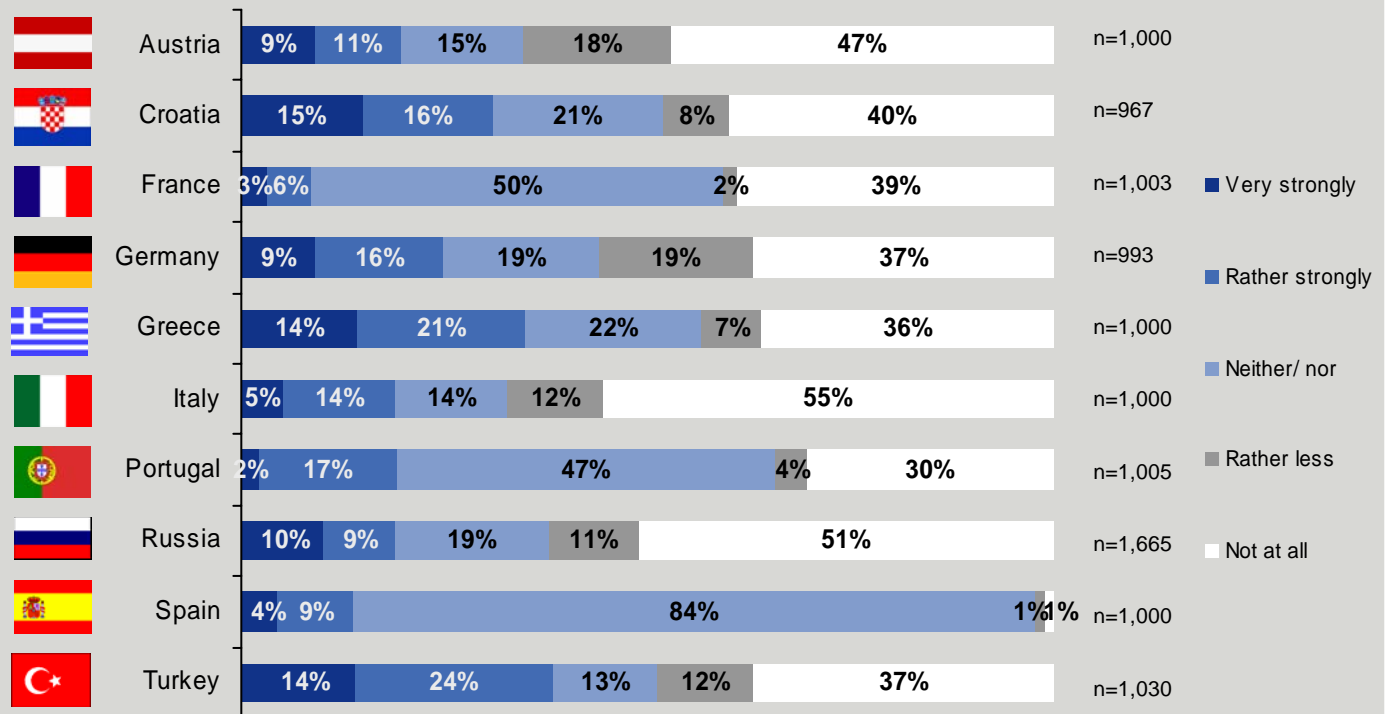
Very confident / rather confident



Question 3b: I will now read you some statements about issues that may play a role in your own life. Please tell me for each of these issues whether your view of them over the next 12 months is very confident, rather confident, neither / nor, rather concerned or very concerned? Basis: Total without d.k./n.a.

The moods of Turks, Greeks and Croats are most influenced in a positive way by the upcoming European Football Championship.

European Football Championship



Question 4: The European Football Championship will begin in Austria and Switzerland in a few days time. How much does the prospect of this tournament improve the way you feel? Basis: Total without d.k./n.a.

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