

**TABLE 11**  
**EXPECTED CHANGE IN FINANCIAL SITUATION IN 5 YEARS**  
**(Three Month Moving Averages)**

The question was: "And 5 years from now, do you expect that you (and your family living there)  
will be better off financially, worse off, or just about the same as now?"

( Note: Prior to 1972 a four year horizon was used)

| <u>Date of Survey</u> | <u>Better Off</u> | <u>Same</u> | <u>Worse Off</u> | <u>DK, NA</u> | <u>Total</u> | <u>Relative</u> | <u>Cases</u> |
|-----------------------|-------------------|-------------|------------------|---------------|--------------|-----------------|--------------|
| September 1980        | 66                | 22          | 9                | 3             | 100          | 157             | 789          |
| March 1981            | 64                | 20          | 13               | 3             | 100          | 151             | 810          |
| September 1981        | 70                | 19          | 8                | 3             | 100          | 162             | 813          |
| March 1982            | 65                | 21          | 11               | 2             | 100          | 154             | 853          |
| September 1982        | 68                | 20          | 10               | 2             | 100          | 158             | 858          |
| March 1983            | 72                | 18          | 8                | 2             | 100          | 164             | 831          |
| September 1983        | 74                | 18          | 6                | 2             | 100          | 168             | 797          |
| March 1984            | 75                | 19          | 5                | 2             | 100          | 170             | 808          |
| September 1984        | 77                | 16          | 5                | 2             | 100          | 172             | 799          |
| September 1985        | 72                | 21          | 5                | 2             | 100          | 166             | 687          |
| September 2011        | 67                | 28          | 5                | 0             | 100          | 161             | 153          |
| October 2011          | 73                | 21          | 6                | 0             | 100          | 167             | 156          |
| November 2011         | 67                | 25          | 8                | 0             | 100          | 158             | 156          |
| December 2011         | 67                | 24          | 9                | 0             | 100          | 158             | 160          |
| January 2012          | 68                | 21          | 10               | 1             | 100          | 158             | 155          |
| February 2012         | 75                | 15          | 8                | 1             | 100          | 167             | 162          |
| March 2012            | 77                | 15          | 6                | 2             | 100          | 171             | 151          |
| April 2012            | 75                | 18          | 5                | 2             | 100          | 170             | 155          |
| May 2012              | 73                | 22          | 3                | 2             | 100          | 170             | 144          |
| June 2012             | 75                | 20          | 4                | 1             | 100          | 171             | 133          |
| July 2012             | 76                | 16          | 6                | 1             | 100          | 170             | 125          |
| August 2012           | 73                | 19          | 7                | 1             | 100          | 165             | 143          |
| September 2012        | 71                | 20          | 8                | 1             | 100          | 163             | 162          |
| October 2012          | 70                | 24          | 5                | 1             | 100          | 165             | 174          |
| November 2012         | 75                | 19          | 4                | 2             | 100          | 171             | 169          |
| December 2012         | 76                | 17          | 3                | 3             | 100          | 173             | 168          |
| January 2013          | 78                | 18          | 2                | 2             | 100          | 175             | 166          |
| February 2013         | 76                | 19          | 4                | 1             | 100          | 172             | 181          |
| March 2013            | 76                | 18          | 5                | 1             | 100          | 171             | 186          |
| April 2013            | 76                | 17          | 6                | 2             | 100          | 170             | 199          |
| May 2013              | 76                | 17          | 5                | 2             | 100          | 171             | 207          |
| June 2013             | 75                | 18          | 5                | 1             | 100          | 170             | 214          |
| July 2013             | 78                | 17          | 5                | 1             | 100          | 173             | 213          |
| August 2013           | 78                | 15          | 7                | 0             | 100          | 170             | 216          |
| September 2013        | 79                | 14          | 5                | 2             | 100          | 174             | 231          |
| October 2013          | 78                | 16          | 5                | 1             | 100          | 173             | 229          |
| November 2013         | 76                | 20          | 3                | 1             | 100          | 174             | 226          |
| December 2013         | 72                | 23          | 5                | 0             | 100          | 167             | 210          |
| January 2014          | 70                | 22          | 7                | 1             | 100          | 163             | 219          |
| February 2014         | 74                | 18          | 6                | 1             | 100          | 168             | 207          |
| March 2014            | 77                | 16          | 5                | 2             | 100          | 172             | 219          |
| April 2014            | 76                | 16          | 5                | 2             | 100          | 171             | 231          |
| May 2014              | 76                | 15          | 8                | 2             | 100          | 168             | 239          |
| June 2014             | 77                | 12          | 9                | 1             | 100          | 168             | 230          |
| July 2014             | 77                | 13          | 8                | 2             | 100          | 169             | 217          |
| August 2014           | 73                | 17          | 6                | 4             | 100          | 167             | 217          |

**TABLE 11**  
**EXPECTED CHANGE IN FINANCIAL SITUATION IN 5 YEARS**  
**(Three Month Moving Averages)**

| <u>Date of Survey</u> | <u>Better Off</u> | <u>Same</u> | <u>Worse Off</u> | <u>DK, NA</u> | <u>Total</u> | <u>Relative</u> | <u>Cases</u> |
|-----------------------|-------------------|-------------|------------------|---------------|--------------|-----------------|--------------|
| September 2014        | 74                | 19          | 3                | 4             | 100          | 171             | 239          |
| October 2014          | 76                | 18          | 3                | 3             | 100          | 174             | 262          |
| November 2014         | 78                | 16          | 4                | 2             | 100          | 174             | 281          |
| December 2014         | 78                | 16          | 5                | 1             | 100          | 173             | 281          |
| January 2015          | 77                | 17          | 5                | 1             | 100          | 171             | 291          |
| February 2015         | 80                | 16          | 4                | 1             | 100          | 176             | 294          |
| March 2015            | 79                | 17          | 3                | 0             | 100          | 176             | 320          |
| April 2015            | 75                | 22          | 3                | 0             | 100          | 172             | 325          |
| May 2015              | 74                | 23          | 3                | 0             | 100          | 170             | 358          |
| June 2015             | 73                | 21          | 4                | 1             | 100          | 169             | 347          |
| July 2015             | 77                | 17          | 4                | 2             | 100          | 172             | 346          |
| August 2015           | 78                | 16          | 4                | 2             | 100          | 174             | 349          |
| September 2015        | 76                | 18          | 5                | 2             | 100          | 171             | 375          |
| October 2015          | 76                | 18          | 4                | 2             | 100          | 172             | 382          |
| November 2015         | 75                | 19          | 4                | 2             | 100          | 171             | 366          |
| December 2015         | 77                | 17          | 4                | 1             | 100          | 173             | 338          |
| January 2016          | 78                | 17          | 4                | 1             | 100          | 174             | 332          |
| February 2016         | 78                | 17          | 4                | 2             | 100          | 174             | 337          |
| March 2016            | 77                | 18          | 3                | 2             | 100          | 174             | 353          |
| April 2016            | 75                | 20          | 3                | 2             | 100          | 172             | 360          |
| May 2016              | 76                | 19          | 3                | 2             | 100          | 173             | 363          |
| June 2016             | 78                | 16          | 4                | 2             | 100          | 175             | 354          |
| July 2016             | 81                | 13          | 4                | 2             | 100          | 177             | 358          |
| August 2016           | 77                | 15          | 6                | 2             | 100          | 171             | 348          |
| September 2016        | 76                | 16          | 6                | 1             | 100          | 170             | 356          |
| October 2016          | 78                | 15          | 7                | 1             | 100          | 171             | 366          |
| November 2016         | 82                | 11          | 6                | 1             | 100          | 177             | 393          |
| December 2016         | 82                | 12          | 4                | 2             | 100          | 178             | 414          |
| January 2017          | 82                | 13          | 3                | 2             | 100          | 179             | 410          |
| February 2017         | 81                | 14          | 4                | 1             | 100          | 177             | 405          |
| March 2017            | 80                | 13          | 5                | 2             | 100          | 174             | 390          |
| April 2017            | 77                | 15          | 6                | 2             | 100          | 171             | 383          |
| May 2017              | 78                | 14          | 5                | 3             | 100          | 173             | 395          |
| June 2017             | 78                | 14          | 5                | 2             | 100          | 173             | 423          |
| July 2017             | 76                | 15          | 6                | 3             | 100          | 171             | 434          |
| August 2017           | 77                | 16          | 5                | 2             | 100          | 172             | 419          |
| September 2017        | 77                | 18          | 4                | 1             | 100          | 173             | 386          |
| October 2017          | 79                | 17          | 3                | 1             | 100          | 176             | 373          |
| November 2017         | 80                | 16          | 4                | 1             | 100          | 176             | 385          |
| December 2017         | 81                | 13          | 5                | 1             | 100          | 177             | 392          |
| January 2018          | 82                | 13          | 5                | 0             | 100          | 177             | 420          |
| February 2018         | 79                | 15          | 5                | 0             | 100          | 174             | 403          |
| March 2018            | 77                | 17          | 4                | 1             | 100          | 173             | 397          |
| April 2018            | 76                | 19          | 4                | 2             | 100          | 172             | 377          |
| May 2018              | 75                | 20          | 3                | 2             | 100          | 172             | 358          |
| June 2018             | 74                | 19          | 5                | 2             | 100          | 169             | 361          |
| July 2018             | 75                | 18          | 6                | 1             | 100          | 169             | 352          |
| August 2018           | 76                | 16          | 7                | 1             | 100          | 169             | 385          |
| September 2018        | 80                | 14          | 5                | 1             | 100          | 175             | 390          |
| October 2018          | 80                | 12          | 6                | 2             | 100          | 174             | 388          |
| November 2018         | 80                | 12          | 6                | 2             | 100          | 174             | 358          |
| December 2018         | 75                | 17          | 7                | 1             | 100          | 169             | 367          |
| January 2019          | 76                | 17          | 6                | 1             | 100          | 170             | 368          |
| February 2019         | 78                | 15          | 6                | 1             | 100          | 173             | 377          |

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| <u>Date of Survey</u> |      | <u>Better Off</u> | <u>Same</u> | <u>Worse Off</u> | <u>DK, NA</u> | <u>Total</u> | <u>Relative</u> | <u>Cases</u> |
|-----------------------|------|-------------------|-------------|------------------|---------------|--------------|-----------------|--------------|
| March                 | 2019 | 83                | 11          | 5                | 1             | 100          | 178             | 352          |
| April                 | 2019 | 82                | 12          | 5                | 1             | 100          | 177             | 369          |
| May                   | 2019 | 78                | 16          | 5                | 1             | 100          | 174             | 376          |
| June                  | 2019 | 77                | 16          | 5                | 1             | 100          | 172             | 382          |
| July                  | 2019 | 76                | 16          | 5                | 2             | 100          | 171             | 359          |
| August                | 2019 | 79                | 13          | 5                | 2             | 100          | 174             | 349          |
| September             | 2019 | 78                | 15          | 5                | 2             | 100          | 173             | 337          |
| October               | 2019 | 81                | 13          | 5                | 1             | 100          | 177             | 369          |
| November              | 2019 | 81                | 13          | 5                | 0             | 100          | 176             | 362          |
| December              | 2019 | 82                | 12          | 6                | 0             | 100          | 176             | 374          |
|                       |      |                   |             |                  |               |              |                 |              |
| January               | 2020 | 81                | 14          | 4                | 1             | 100          | 176             | 348          |
| February              | 2020 | 78                | 16          | 5                | 1             | 100          | 173             | 350          |
| March                 | 2020 | 79                | 15          | 4                | 2             | 100          | 175             | 365          |
| April                 | 2020 | 78                | 15          | 5                | 1             | 100          | 173             | 386          |
| May                   | 2020 | 82                | 13          | 4                | 1             | 100          | 178             | 416          |
| June                  | 2020 | 82                | 14          | 3                | 1             | 100          | 180             | 397          |
| July                  | 2020 | 83                | 13          | 3                | 1             | 100          | 179             | 386          |
| August                | 2020 | 83                | 13          | 4                | 0             | 100          | 179             | 377          |
| September             | 2020 | 82                | 14          | 4                | 0             | 100          | 178             | 371          |
| October               | 2020 | 79                | 16          | 3                | 2             | 100          | 176             | 371          |
| November              | 2020 | 77                | 17          | 4                | 2             | 100          | 174             | 363          |
| December              | 2020 | 78                | 16          | 3                | 2             | 100          | 175             | 385          |
|                       |      |                   |             |                  |               |              |                 |              |
| January               | 2021 | 81                | 14          | 4                | 1             | 100          | 177             | 389          |
| February              | 2021 | 80                | 16          | 4                | 1             | 100          | 176             | 392          |
| March                 | 2021 | 77                | 17          | 5                | 1             | 100          | 171             | 370          |
| April                 | 2021 | 79                | 15          | 6                | 1             | 100          | 173             | 365          |
| May                   | 2021 | 79                | 15          | 5                | 1             | 100          | 173             | 365          |
| June                  | 2021 | 80                | 14          | 6                | 1             | 100          | 174             | 395          |
| July                  | 2021 | 77                | 16          | 6                | 1             | 100          | 170             | 414          |
| August                | 2021 | 77                | 15          | 7                | 1             | 100          | 170             | 402          |