# TABLE 12

## FIVE YEAR TREND IN PAST AND EXPECTED HOUSEHOLD FINANCIAL SITUATION

| | Feb 2023 | Mar 2023 | Apr 2023 | May 2023 | Jun 2023 | Jul 2023 | Aug 2023 | Sep 2023 | Oct 2023 | Nov 2023 | Dec 2023 | Jan 2024 | Feb 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Personal Financial Progress | | | | | | | | | | | | | |
| Continuous increase (a) | 34% | 30% | 30% | 33% | 30% | 34% | 33% | 30% | 28% | 31% | 31% | 32% | 30% |
| Intermittent increase (b) | 18 | 17 | 17 | 14 | 15 | 18 | 19 | 18 | 15 | 18 | 15 | 18 | 18 |
| Remain unchanged (c) | 3 | 5 | 4 | 4 | 5 | 3 | 3 | 5 | 6 | 4 | 6 | 4 | 5 |
| Intermittent decline (d) | 12 | 14 | 13 | 13 | 15 | 11 | 12 | 11 | 12 | 12 | 11 | 10 | 12 |
| Continuous decline (e) | 8 | 10 | 11 | 10 | 9 | 8 | 9 | 10 | 12 | 12 | 11 | 9 | 9 |
| Mixed change (f) | 21 | 19 | 18 | 20 | 21 | 19 | 20 | 19 | 21 | 18 | 19 | 21 | 21 |
| DK, NA | 4 | 5 | 7 | 6 | 5 | 7 | 4 | 7 | 6 | 5 | 7 | 6 | 5 |
| TOTAL | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| CASES | 602 | 603 | 601 | 605 | 600 | 601 | 604 | 603 | 605 | 600 | 600 | 601 | 602 |
| INDEX SCORE | 132 | 123 | 123 | 124 | 121 | 133 | 131 | 127 | 119 | 125 | 124 | 131 | 127 |

### FIVE YEAR TREND IN PAST AND EXPECTED HOUSEHOLD FINANCIAL SITUATION - INDEX SCORE
### THREE MONTH MOVING AVERAGES

| | Feb 2023 | Mar 2023 | Apr 2023 | May 2023 | Jun 2023 | Jul 2023 | Aug 2023 | Sep 2023 | Oct 2023 | Nov 2023 | Dec 2023 | Jan 2024 | Feb 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| All | 130 | 129 | 126 | 123 | 123 | 126 | 128 | 130 | 126 | 124 | 123 | 127 | 127 |
| Age 18 to 44 | 157 | 157 | 153 | 155 | 153 | 156 | 153 | 154 | 150 | 148 | 147 | 149 | 152 |
| Age 45 to 64 | 125 | 121 | 119 | 110 | 112 | 114 | 122 | 126 | 121 | 120 | 115 | 120 | 117 |
| Age 65+ | 101 | 99 | 96 | 94 | 93 | 98 | 102 | 103 | 96 | 93 | 98 | 105 | 107 |
| Income Bottom Third | 110 | 110 | 110 | 110 | 110 | 110 | 110 | 110 | 107 | 103 | 104 | 110 | 111 |
| Income Middle Third | 126 | 125 | 124 | 119 | 118 | 121 | 124 | 127 | 123 | 128 | 127 | 128 | 124 |
| Income Top Third | 156 | 154 | 146 | 141 | 140 | 146 | 152 | 154 | 148 | 141 | 139 | 144 | 148 |
| Educ High School or Less | 111 | 108 | 107 | 104 | 108 | 113 | 115 | 112 | 109 | 104 | 106 | 108 | 112 |
| Educ Some College | 122 | 122 | 120 | 117 | 117 | 116 | 120 | 119 | 116 | 111 | 111 | 118 | 122 |
| Educ College Degree | 144 | 144 | 139 | 137 | 132 | 136 | 137 | 143 | 138 | 139 | 135 | 139 | 136 |
| Democrat | 146 | 148 | 146 | 144 | 143 | 148 | 149 | 150 | 144 | 146 | 146 | 153 | 151 |
| Independent | 135 | 130 | 124 | 118 | 119 | 123 | 129 | 129 | 126 | 121 | 120 | 124 | 127 |
| Republican | 105 | 105 | 107 | 108 | 103 | 102 | 103 | 109 | 107 | 104 | 103 | 101 | 99 |

Combination of the responses to the questions on Tables 10 and 11.

Key: (a) Better off financially than 5 years ago/Better off 5 years from now
(b) Better/Same or Same/Better
(c) Same/Same
(d) Worse/Same or Same/Worse
(e) Worse/Worse
(f ) Worse/Better or Better/Worse

Index Score is the percent favorable minus the percent unfavorable plus 100