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Cetelem

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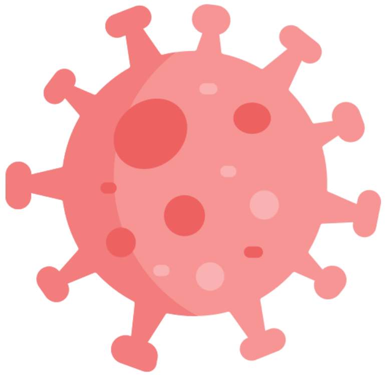
# L’Observatoire Cetelem CONSO 2020

**Intermediate measure** following the Coronavirus health crisis



**September 2020**

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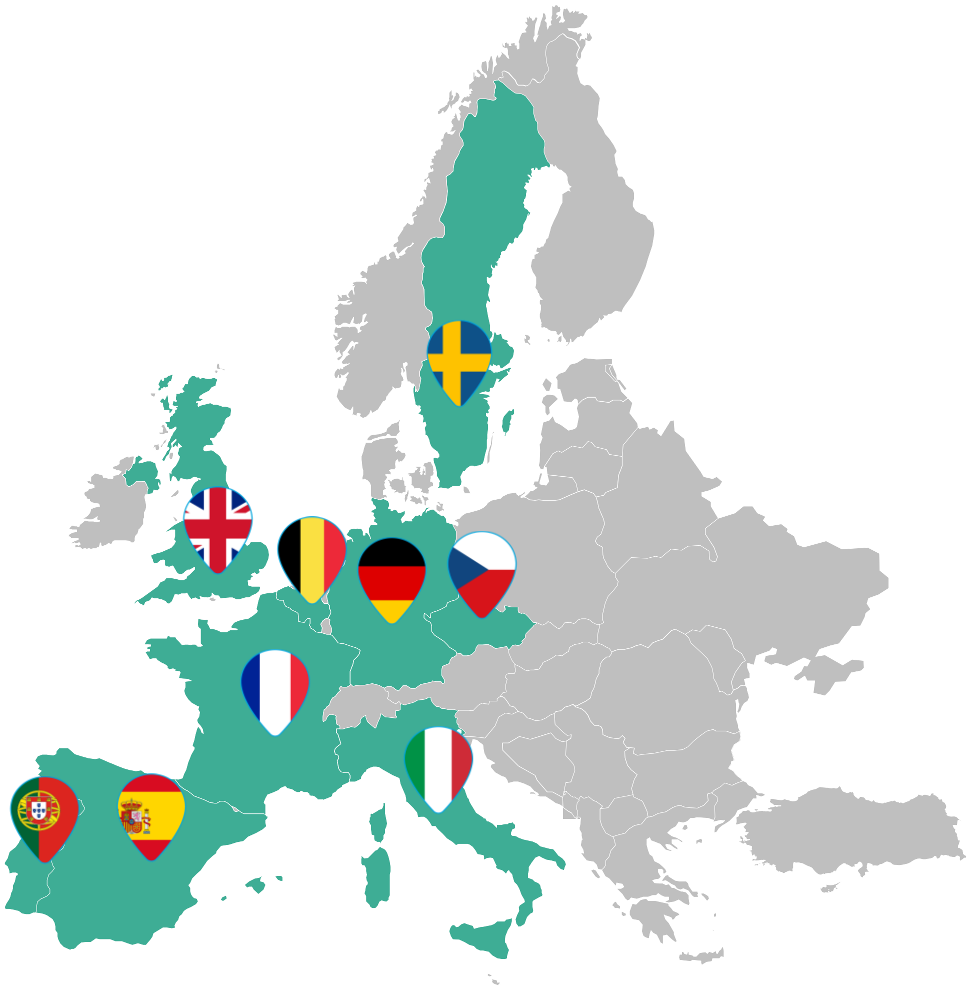
# Study methodology



- Studies **led online and simultaneously in nine European countries**
- **Nine samples representing the national population of each country aged from 18 to 75, questioned from 25th August to 2 September 2020**
- **In total, 7400 people questioned, spread across the different countries as follows:**
    - **France** 1000 interviewees
    - **Germany** 800 interviewees
    - **Belgium** 800 interviewees
    - **Spain** 800 interviewees
    - **Italy** 800 interviewees
    - **Portugal** 800 interviewees
    - **Czech Republic** 800 interviewees
    - **United Kingdom** 800 interviewees
    - **Sweden** 800 interviewees
- **Representativeness is guaranteed by quota sampling and an adjustment** applied to the following variables: gender, age, region of residence and the level of income (or socio-professional category) of those questioned in each of the countries. Each country was attributed a weighting allowing us to pass on the impact of its internal market within the gross sample.
- **The trends** presented in this report refer to the study by the l'Observatoire de la Consommation carried out for Cetelem in 2020 in fifteen countries**.** The trends in the "Grouped" figures are nevertheless presented **in the results of the study led in the same nine countries.**

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# Confidence interval

The confidence interval (often called “margin of error”) lets you determine the confidence that can be attributed to a value, taking into account the value observed and the size of the sample. The confidence interval (often called “margin of error”) lets you determine the confidence that can be attributed to a value, taking into account the value observed and the size of the sample.

| Sample Size | 5% or 95% | 10% or 90% | 20% or 80% | 30% or 70% | 40% or 60% | 50% |
|---|---|---|---|---|---|---|
| 100 interviews | 4.4 | 6.0 | 8.0 | 9.2 | 9.8 | 10 |
| 200 interviews | 3.1 | 4.3 | 5.7 | 6.5 | 6.9 | 7.1 |
| 300 interviews | 2.5 | 3.5 | 4.6 | 5.3 | 5.7 | 5.8 |
| 400 interviews | 2.2 | 3.0 | 4.0 | 4.6 | 4.9 | 5.0 |
| 500 interviews | 2.0 | 2.7 | 3.6 | 4.1 | 4.4 | 4.5 |
| 600 interviews | 1.8 | 2.4 | 3.3 | 3.8 | 4.0 | 4.1 |
| 800 interviews | 1.5 | 2.1 | 2.8 | 3.2 | 3.4 | 3.5 |
| 1 000 interviews | 1.4 | 1.8 | 2.5 | 2.9 | 3.0 | 3.1 |
| 2,000 interviews | 1.0 | 1.3 | 1.8 | 2.1 | 2.2 | 2.3 |
| 3,000 interviews | 0.8 | 1.1 | 1.5 | 1.7 | 1.8 | 1.8 |
| 4,000 interviews | 0.7 | 0.9 | 1.3 | 1.5 | 1.6 | 1.6 |
| 6,000 interviews | 0.6 | 0.8 | 1.1 | 1.3 | 1.4 | 1.4 |

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***Note to the reader:*** **in the case of a sample of 1,000 people,** if the percentage measured is 10%, the margin of error is equal to 1.8. There is therefore a 95% chance that the real percentage is between 8.2% and 11.8% (more or less 1.8 points).

# I. Economic and budgetary dynamics on the scale of household consumption

BAROMETRIC QUESTIONS

# Retrospectives, the state of play and outlook: Europeans managing the crisis

In a global context marked for several months by the Covid-19 pandemic, Europeans provide **contrasting outlooks** on the situation **with a general feeling that things have deteriorated more for the country than for their personal situations** (-0.5 for the country's situation compared to last year, -0.1 in terms of their perceived personal situation).

The results reveal mixed feelings depending on the country, with those **more impacted by the pandemic generally suffering from more severe judgements and displaying greater gaps with regard to the perception of the country's situation**: Belgium (-0.7), France (-0.6), Spain (-0.6, to 3.9, the lowest level measured in Europe), and UK (-0.5), a view trending downward over two years for these two countries, which the pandemic has reinforced while Italy remains stable, at a level which was already low before the crisis (4.9, or -0.1). We note the exception of Germany whose sharp decline (-0.7) refers less to the management of the crisis than it does to the very high level before the crisis, which is now closer to other European countries (and which is even been passed by Sweden)

At the same time, **the evaluation of its personal situation doesn't display any significant gaps at a time when the crisis seems to be staying rather than going away.** All countries thereby currently display indicators linked to the appreciation of their relatively stable personal situation (-0.1 overall).

Although this type of gap is observed regularly, it is particularly so in this precise case, in those countries impacted for the long term by this crisis (firstly, health-related) cited above. Furthermore, this gap in perceptions is particularly high in France (4.7 being the country's situation and 6.0 being its personal situation).

**This is therefore an impact of the crisis that, in the most severely affected countries, now seems to exist on a more national level than an individual one.**

# Retrospectives, the state of play and outlook: Europeans managing the crisis

On a purely economic level, **the tendency to save more, as in the past, seems to be higher than that of increasing spending over the next twelve months**. The general attitude seems to come back to a **certain degree of caution** (49% intend to increase their savings, 35%, -3 to increase their spending). This autumn, the intention to save increases almost everywhere and that of increasing spending tends to drop with significant disparities, however, between countries, as already displayed in the past but accentuated by the impact of the crisis.

We therefore observe variable dynamics from one country to another. **Consumers in the most severely impacted countries display more marked intentions than in the past, aiming to prevent potential difficulties**: the intention to increase savings has thereby increased by 4 points in Belgium and the UK, 5 points in Italy, and very strongly in France (+8 points). It also remains high in Germany (53%), Sweden (62%), Spain (56%) and Portugal (62%).

At the same time, Italians, the British and Czechs are among the highest number to be more vigilant than in the past when it comes to increasing their spending over the coming months. Although the recorded levels related to these intentions remains high, they have nevertheless fallen by -18 and -7 points respectively.

In this context, **the intention to buy different products in the coming year has also fallen,** significantly for most of them (-1 to -6 points), and very noticeably for travel and leisure , with a drop of 20 points. This cautious approach to the future in terms of touristic consumption, despite travel restrictions having been relaxed compared to past months, now illustrates how difficult it will be to make progress in this area, despite everything, from a period of inactivity lasting several months to a possible rebound in the pandemic.

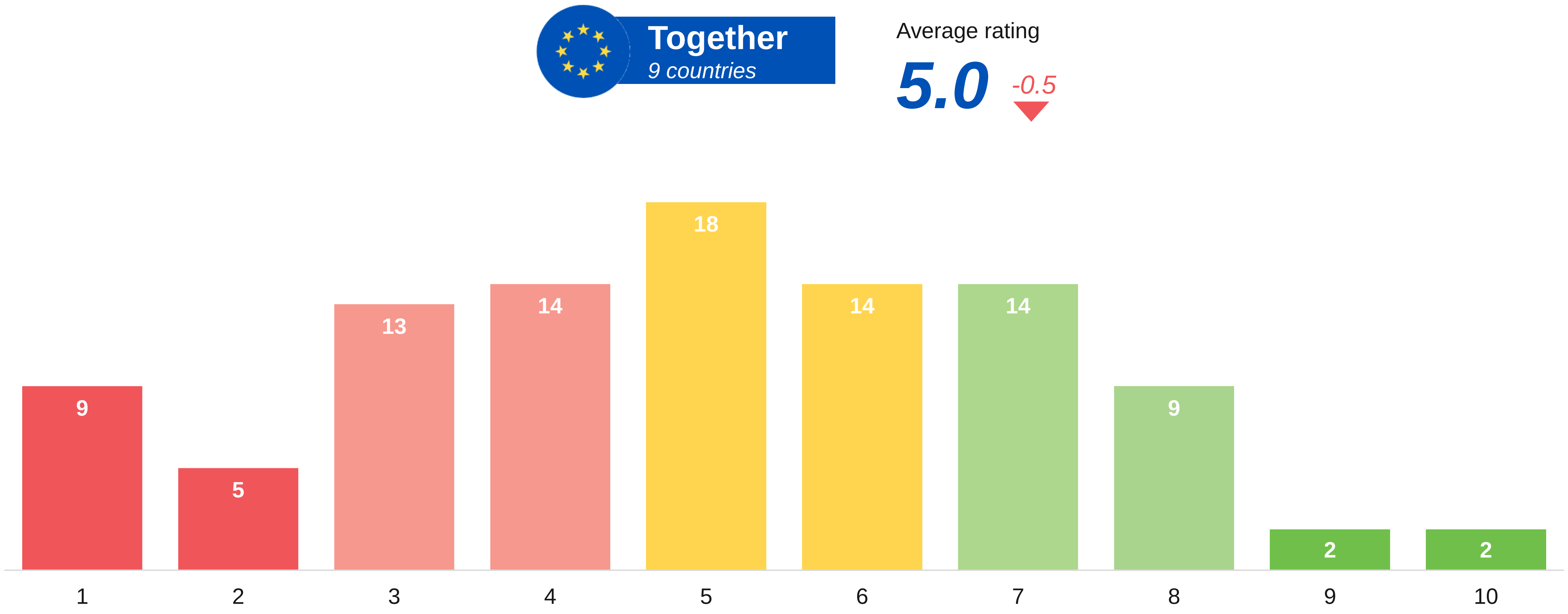
# I. Economic and budgetary dynamics on the scale of household consumption

*A. General representations*

# Invited to describe the current general situation in their country during the Covid-19 crisis, Europeans give a score of 5/10

How would you describe the current general situation in your country on a scale of 1 to 10?

- To all respondents, in % -

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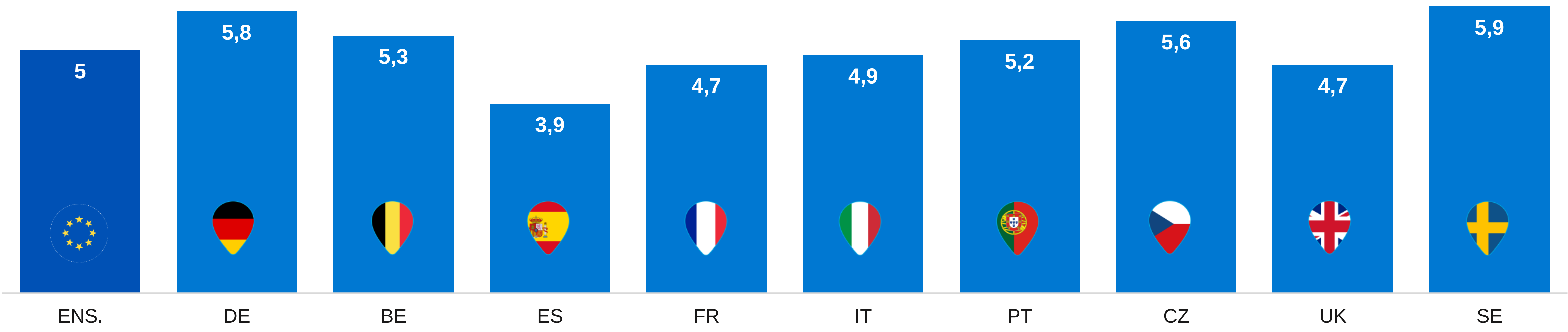
# Details per country

How would you describe the current general situation in your country on a scale of 1 to 10?

- To all, on average -

**Together**
*9 countries*

Average rating
**5.0** -0.5



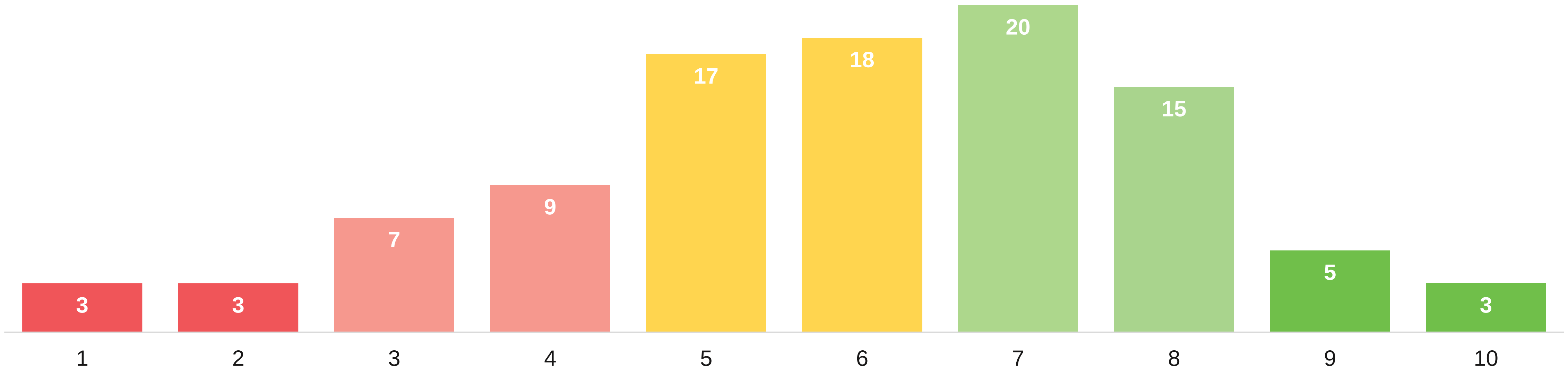
# Invited to describe the current personal situation in their country during the Covid-19 crisis, Europeans give a score of 5.9/10

How would you currently rate your personal circumstances on a scale of 1 to 10?

- To all respondents, in % -

**Together**
*9 countries*

Average rating
**5.9** -0.1

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# Details per country

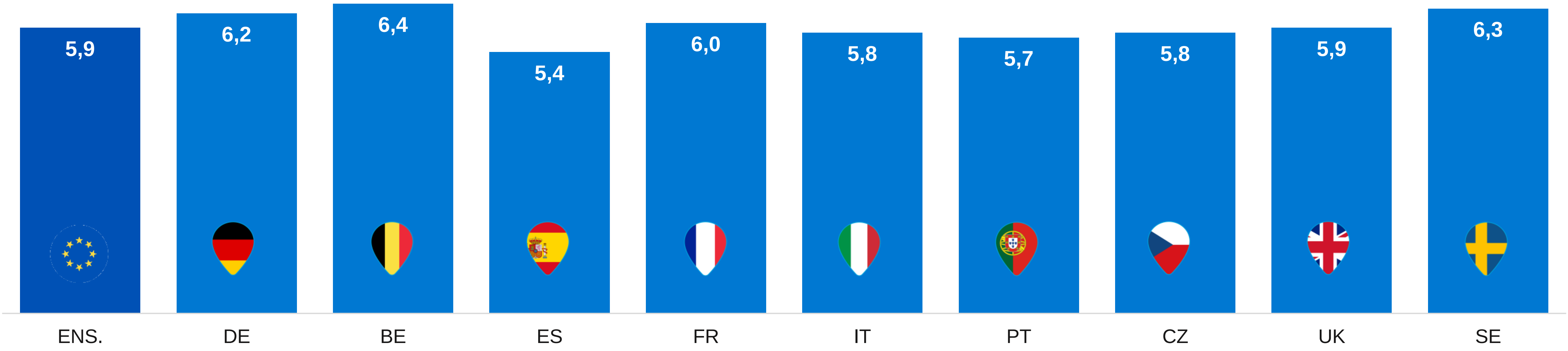
How would you currently rate your personal circumstances on a scale of 1 to 10?

- To all, on average -

**Together**
*9 countries*

Average rating

**5.9** -0.1



# Details per country

How would you describe the current general situation of your country on a scale of 1 to 10? / And, how would you describe your current personal situation on a scale of 1 to 10?

- To all, on average -

**Perception of the development of the country**

| | Obs 2019 | Obs 2020 | Sept. 2020 (Intermediate measure) | Obs 2020 Development- Int. Measure |
|---|---|---|---|---|
| ENS. | 5.5 | 5.5 | 5.0 | -0.5 |
| DE | 6.6 | 6.5 | 5.8 | 0.7 |
| BE | 5.7 | 6.0 | 5.3 | 0.7 |
| ES | 4.8 | 4.5 | 3.9 | 0.6 |
| FR | 4.6 | 5.3 | 4.7 | 0.6 |
| IT | 4.9 | 5.0 | 4.9 | -0.1 |
| PT | 5.5 | 5.5 | 5.2 | 0.3 |
| CZ | 5.4 | 5.6 | 5.6 | = |
| UK | 5.9 | 5.2 | 4.7 | -0.5 |
| SE | 6.1 | 6.1 | 5.9 | 0.2 |

**Perception of the development of the personal situation**

| | Obs 2019 | Obs 2020 | Sept. 2020 (Intermediate measure) | Obs 2020 Development- Int. Measure |
|---|---|---|---|---|
| ENS. | 6.2 | 6.0 | 5.9 | -0.1 |
| DE | 6.5 | 6.3 | 6.2 | -0.1 |
| BE | 6.3 | 6.4 | 6.4 | = |
| ES | 5.9 | 5.6 | 5.4 | 0.2 |
| FR | 5.7 | 6.1 | 6.0 | -0.1 |
| IT | 5.9 | 5.9 | 5.8 | -0.1 |
| PT | 5.8 | 5.8 | 5.7 | -0.1 |
| CZ | 5.6 | 5.6 | 5.8 | +0.2 |
| UK | 6.6 | 6.1 | 5.9 | 0.2 |
| SE | 6.6 | 6.5 | 6.3 | 0.2 |

# I. Economic and budgetary dynamics on the scale of household consumption

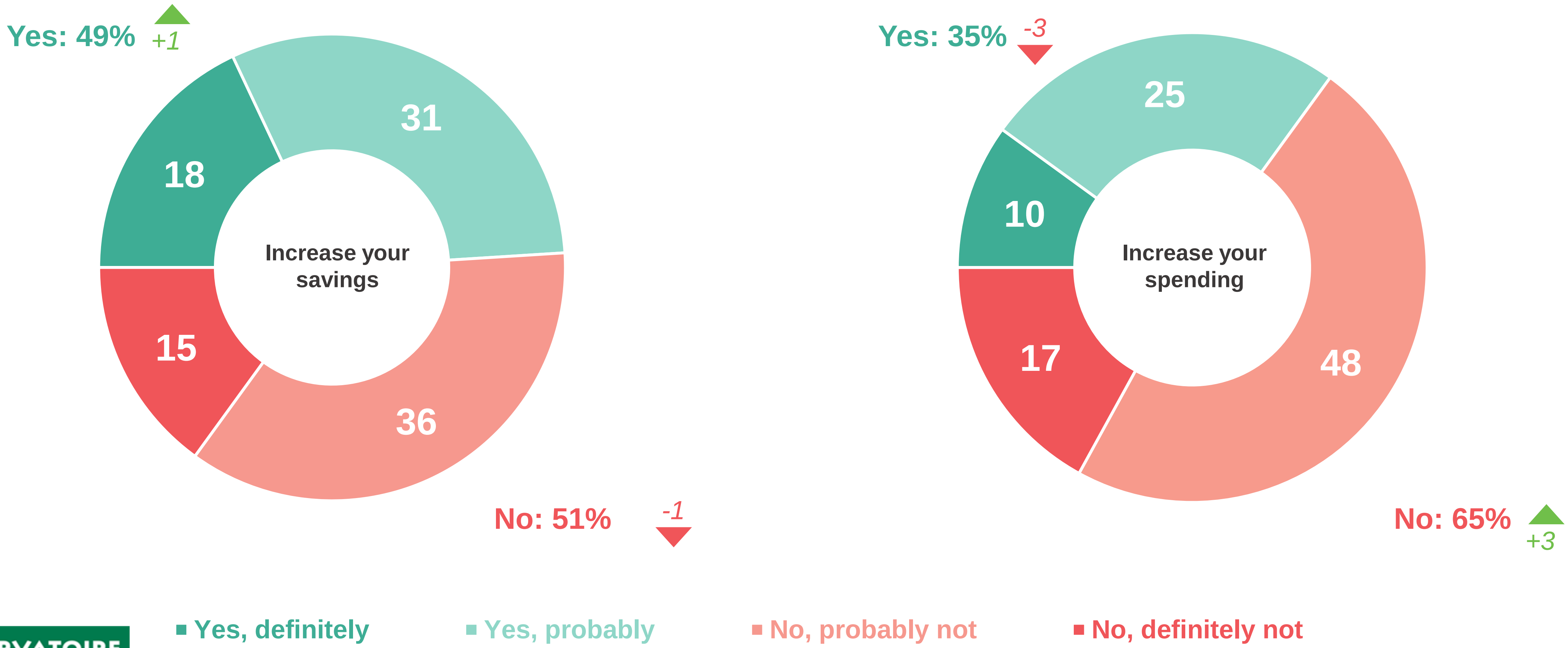
*B. Purchasing power and consumption outlook*

# Following the Covid-19 pandemic and its consequences, Europeans expect to restrict their spending and increase their savings

Over the next 12 months, do you expect to…

**Together**
*9 countries*

- To all respondents, in % -

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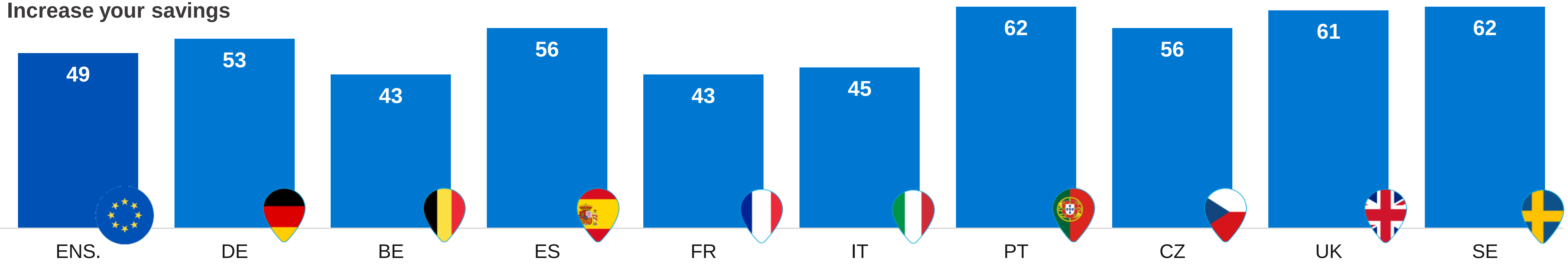
# Details per country

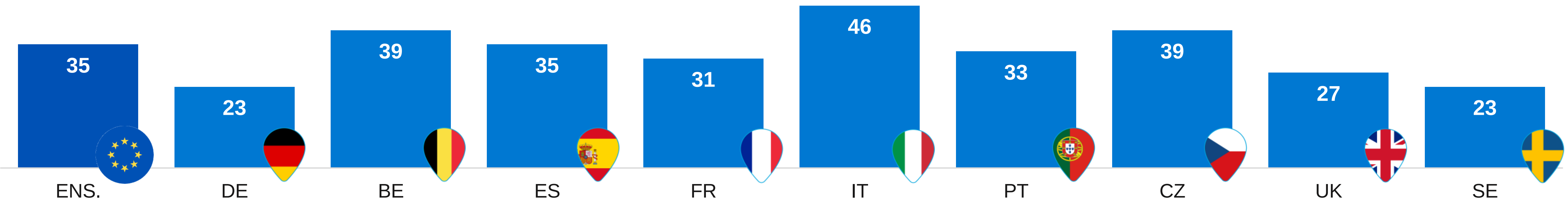
Over the next 12 months, do you expect to…

- To all, as a % of responses “**Yes**” -

**Increase your savings**




**Increase your spending**

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# Details per country

Over the next 12 months, do you expect to…

- To all, as a % of responses “**Yes**” -

| Change in sentiment concerning increasing savings | Obs 2019 | Obs 2020 | Sept. 2020 (Intermediate measure) | Obs 2020 Development-Int. Measure |
|---|---|---|---|---|
| ENS. | 47 | 48 | 49 | +1 |
| DE | 44 | 51 | 53 | +2 |
| BE | 36 | 39 | 43 | +4 |
| ES | 56 | 57 | 56 | -1 |
| FR | 29 | 35 | 43 | +8 |
| IT | 50 | 40 | 45 | +5 |
| PT | 64 | 60 | 62 | +2 |
| CZ | 48 | 53 | 56 | +3 |
| UK | 59 | 57 | 61 | +4 |
| SE | 63 | 66 | 62 | -4 |

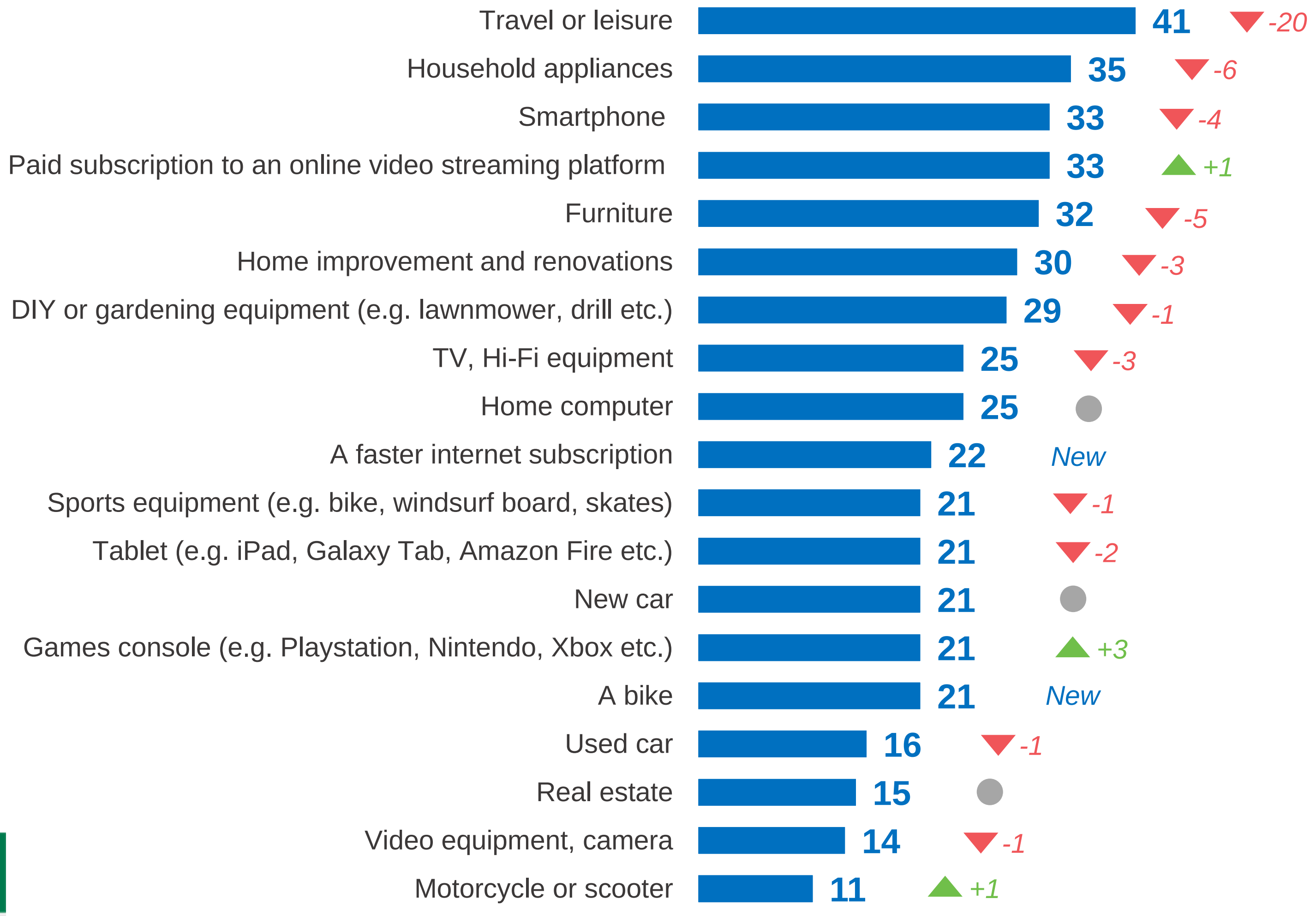
| Change in sentiment concerning increasing spending | Obs 2019 | Obs 2020 | Sept. 2020 (Intermediate measure) | Obs 2020 Development-Int. Measure |
|---|---|---|---|---|
| ENS. | 38 | 38 | 35 | -3 |
| DE | 32 | 28 | 23 | -5 |
| BE | 42 | 40 | 39 | -1 |
| ES | 45 | 36 | 35 | -1 |
| FR | 35 | 35 | 31 | -4 |
| IT | 49 | 64 | 46 | -18 |
| PT | 33 | 31 | 33 | -2 |
| CZ | 60 | 49 | 39 | -10 |
| UK | 32 | 34 | 27 | -7 |
| SE | 42 | 27 | 23 | -4 |

# Main effect of the health crisis, anticipated spending on leisure activities falls sharply

Are you considering buying any of the following products and services over the next 12 months?

- To all, as a % of responses "**Yes**" -

**Together**
*9 countries*



# Details per country

Are you considering buying any of the following products and services over the next 12 months?

- To all, as a % of responses "**Yes**" -

| 1/2 | ENS | DE | BE | ES | FR | IT | PT | CZ | UK | SE |
|---|---|---|---|---|---|---|---|---|---|---|
| Travel or leisure | **41** | 44 | 37 | 35 | 40 | 43 | 40 | 41 | 45 | 43 |
| Household appliances | **35** | 31 | 28 | 37 | 31 | 44 | 32 | 38 | 37 | 28 |
| Smartphone | **33** | 30 | 21 | 42 | 26 | 41 | 26 | 30 | 37 | 28 |
| Paid subscription to an online video streaming platform | **33** | 27 | 20 | 42 | 22 | 44 | 22 | 17 | 40 | 35 |
| Furniture | **32** | 33 | 24 | 33 | 29 | 31 | 27 | 30 | 35 | 33 |
| Home improvement and renovations | **30** | 35 | 27 | 30 | 33 | 33 | 24 | 23 | 21 | 31 |
| DIY or gardening equipment (e.g. lawnmower, drill etc.) | **29** | 24 | 23 | 27 | 26 | 34 | 22 | 27 | 36 | 25 |
| TV, Hi-Fi equipment | **25** | 24 | 13 | 30 | 21 | 34 | 16 | 15 | 26 | 20 |
| Home computer | **25** | 21 | 17 | 31 | 23 | 32 | 20 | 15 | 23 | 15 |

# Details per country

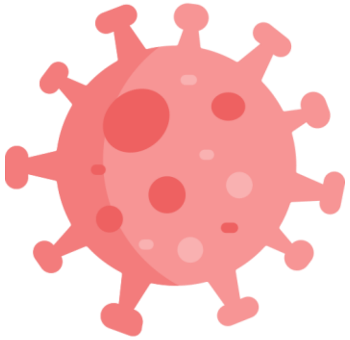
Are you considering buying any of the following products and services over the next 12 months?

- To all, as a % of responses "**Yes**" -

| 2/2 | ENS | DE | BE | ES | FR | IT | PT | CZ | UK | SE |
|---|---|---|---|---|---|---|---|---|---|---|
| A faster internet subscription | **22** | 19 | 12 | 30 | 20 | 31 | 18 | 14 | 23 | 14 |
| Sports equipment (e.g. bike, windsurf board, skates) | **21** | 21 | 19 | 25 | 18 | 27 | 13 | 19 | 18 | 22 |
| Tablet (e.g. iPad, Galaxy Tab, Amazon Fire etc.) | **21** | 19 | 9 | 27 | 15 | 29 | 13 | 16 | 24 | 18 |
| New car | **21** | 19 | 8 | 25 | 19 | 32 | 9 | 9 | 20 | 15 |
| Games console (e.g. Playstation, Nintendo, Xbox etc.) | **21** | 20 | 9 | 25 | 17 | 22 | 11 | 11 | 27 | 13 |
| A bike | **21** | 22 | 15 | 20 | 18 | 27 | 13 | 13 | 19 | 16 |
| Used car | **16** | 17 | 10 | 15 | 17 | 18 | 17 | 15 | 19 | 16 |
| Real estate | **15** | 13 | 11 | 19 | 15 | 14 | 11 | 9 | 16 | 12 |
| Video equipment, camera | **14** | 14 | 7 | 17 | 13 | 17 | 9 | 10 | 15 | 8 |
| Motorcycle or scooter | **11** | 12 | 5 | 14 | 9 | 14 | 7 | 7 | 11 | 7 |

# I. Economic and budgetary dynamics on the scale of household consumption

*C. The impact of the health crisis and lockdown on consumption habits*



# Retrospectives, the state of play and outlook: Europeans managing the crisis

In the context of the health crisis, **the sense of an increase in purchasing power has dropped significantly, often halving in some countries. It is 13% overall (-8 points)** and even drops to 7% and 9% in Italy and Portugal respectively. A sense of stagnation in terms of purchasing power is clearly more dominant in countries where the authorities have deployed strong and widespread measures to try to curb the effects of the economic crisis and its repercussions on households (particularly aiming to protect jobs as much as possible and guarantee income for as many as possible). This is the case for France, particularly where we measure a lower sense of falling purchasing power. Although the proportion of those saying that it has risen is low (11%, compared to 13% at the end of 2019), fewer believe that it has deteriorated: 38% compared to 48% at the end of 2019) an significantly more believe it is stable (51%, +12 points). Furthermore, significantly more than the average say they have had a tendency to consume and spend more than save since the end of lockdown compared to the period before Covid-19. **This suggests that the feared economic effects of the crisis and the particularly sober outlook announced for several months has not, at this stage, been felt noticeably on an individual level, at least in France, even though caution concerning the future largely remains people's position.**

**Elsewhere in Europe, trends tend to be much worse**, with very negative effects on the sense of purchasing power, particularly in Spain, Italty and Portugal, countries which were already economically fragile before the start of the Covid-19 crisis where nearly one person in two believe that their purchasing power has decreased recently, an increase of 14 to 21 points compared to the end of 2019.

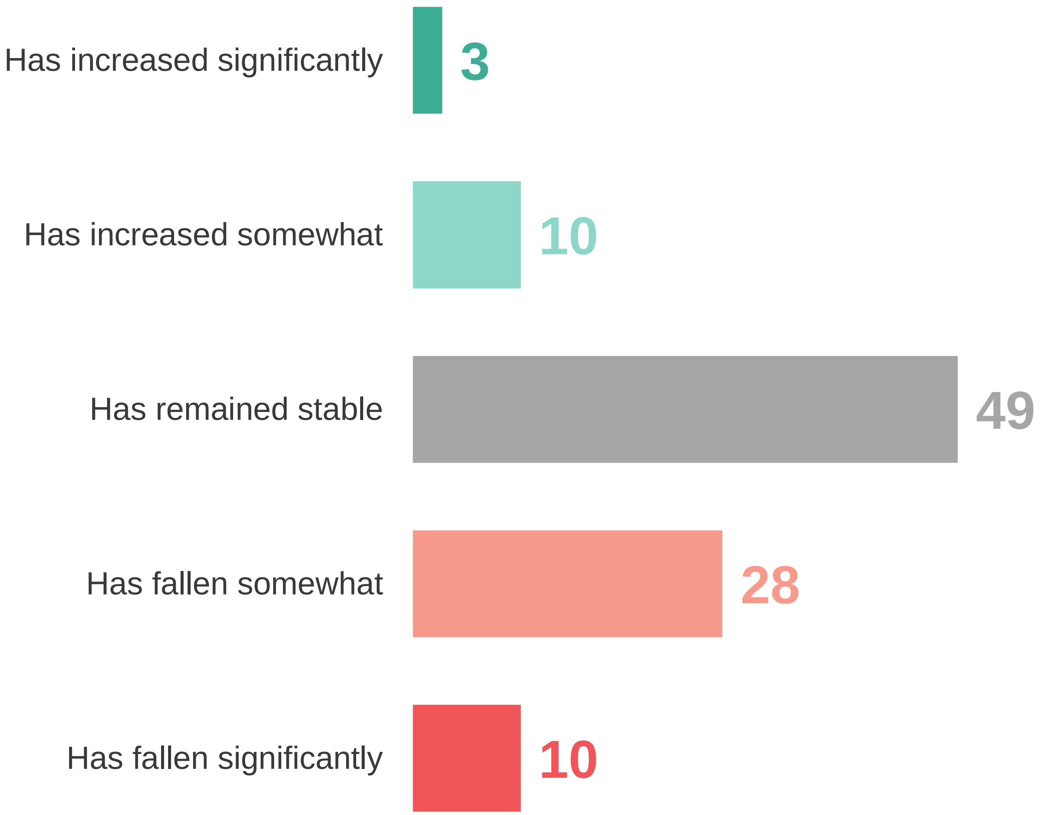
Beyond that, **it seems that everywhere it is time for prudence and to wait and see.** Since the end of the lockdown periods, the majority of Europeans say they have paid more attention to their spending and saving (78% on average, up to 84% in Spain and 91% in Portugal) than to consuming or investing (22%). From their point of view, the only area of spending that has really changed compared to the pre-Covid-19 crisis situation is food, and this across all countries. In their statements, all other areas of spending have decreased or remained stable. The highest reductions concern spending on leisure, travel and holidays (we've noted that intentions concerning these sectors over the next twelve months are just as low). Finally, spending dedicated to accommodation and household appliances has seen an appreciable rise without however being significant and above all varying from one country to another (High in Spain, 29%, low in Germany, 13%).

# In the different European countries, the dominant feeling is that of stagnation or a drop in purchasing power

In the context of the health crisis, would you say that your purchasing power...?

**Together**
*9 countries*

- To all respondents, in % -




**13%**
Believe that their purchasing power **has increased** in the context of the health crisis

**38%**
Believe that their purchasing power **has decreased** in the context of the health crisis

*Obs 2020 Reminder**

| | | |
|---|---|---|
| Has increased significantly | 4 | 21 |
| Has increased somewhat | 17 | |
| Has remained stable | 46 | |
| Has fallen somewhat | 23 | 33 |
| Has fallen significantly | 10 | |

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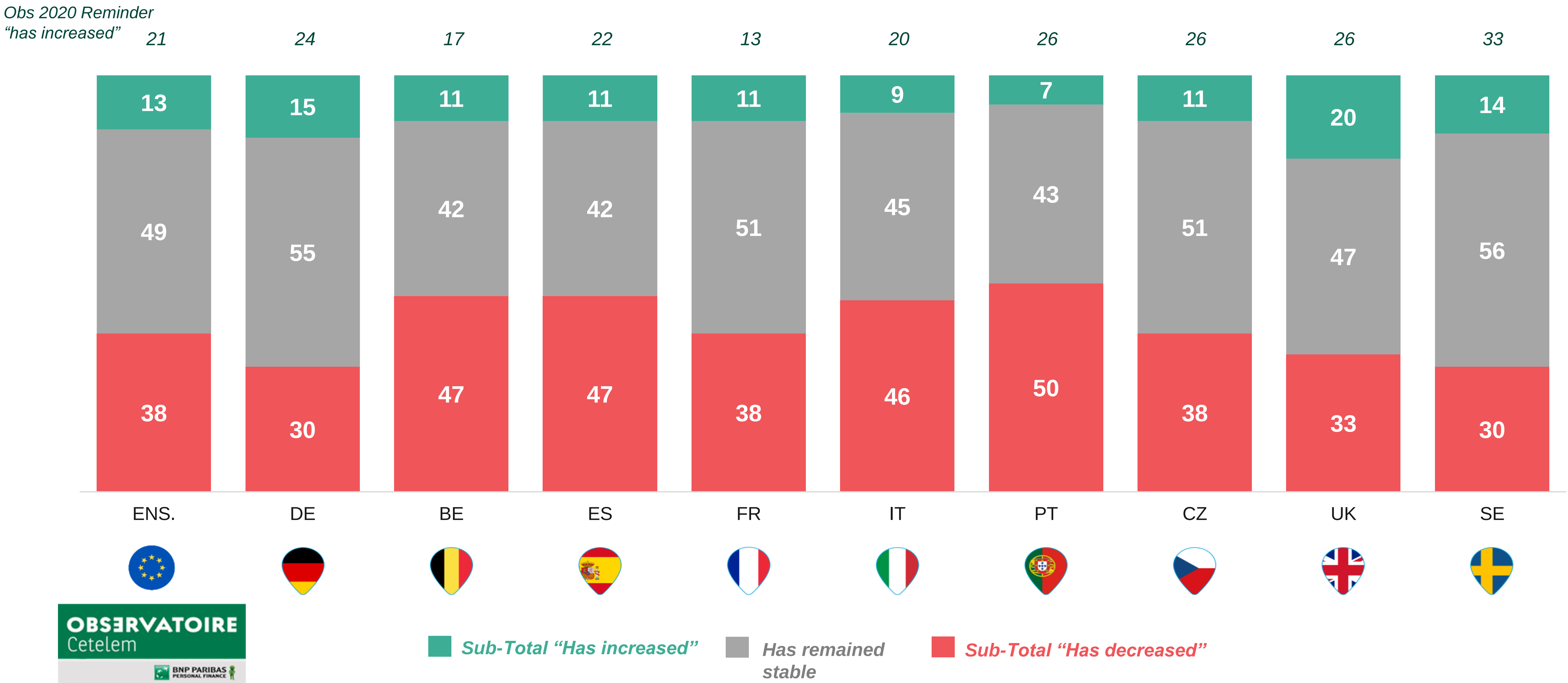
**The question in the previous survey was: “Over the last 12 months, would you say that your purchasing power…?”*

# Details per country

In the context of the health crisis, would you say that your purchasing power...?

- To all respondents, in % -



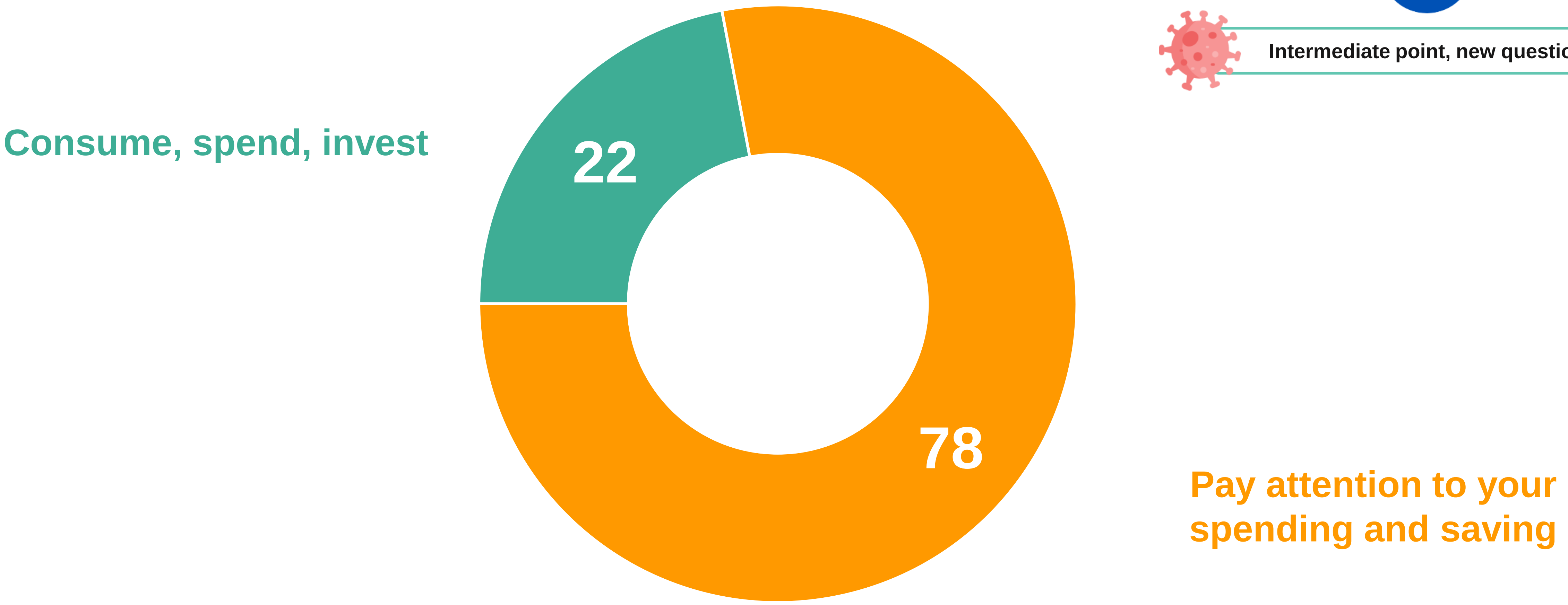
# Invited to consider their attitude since the end of lockdown, the vast majority of Europeans say they are in a state of mind where they pay attention to their spending and try to save, rather than consume and invest

Among the two following approaches, which do you feel you are closest to personally? Since the end of lockdown, you generally feel...?

**Together**
*9 countries*

- To all respondents, in % -

**Intermediate point, new question**

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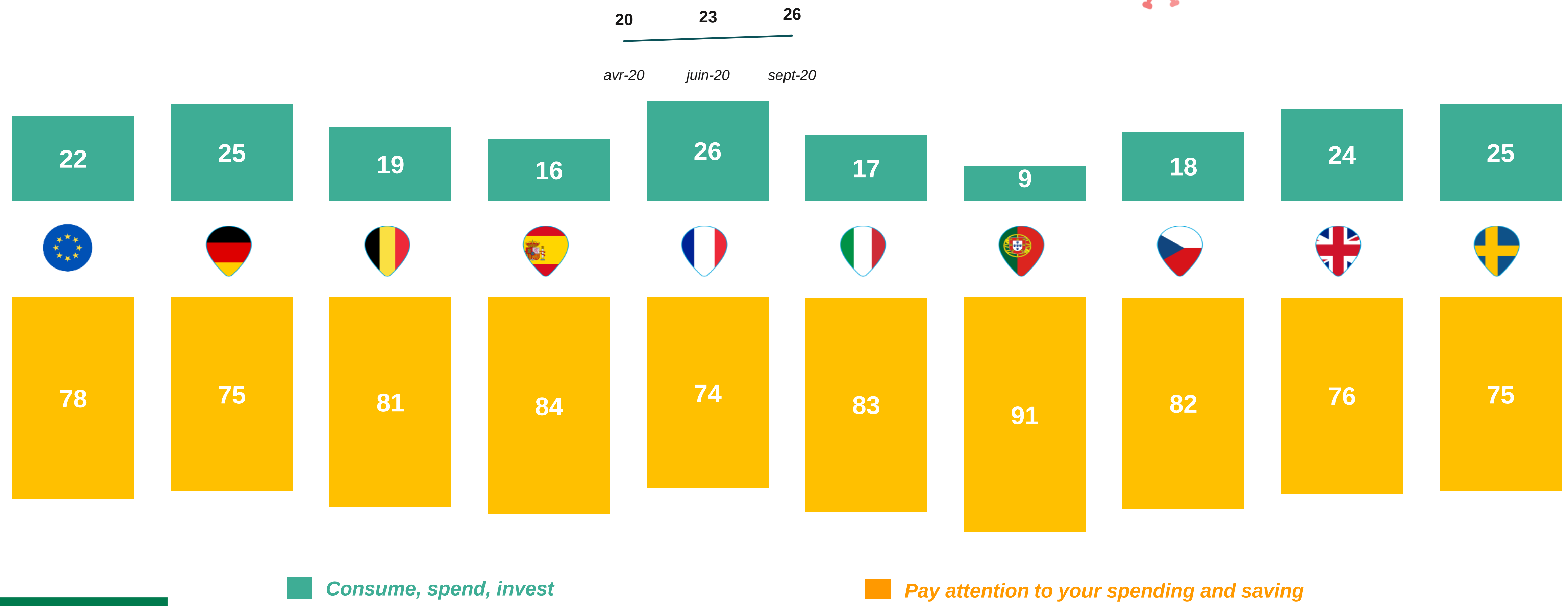
# Details per country

Among the two following approaches, which do you feel you are closest to personally? Since the end of lockdown, you generally feel...?

- To all respondents, in % -

Intermediate point, new question




* In France: a question already asked within the context of “Observatoire Cetelem Zooms” in April (situation envisaged on D37 of lockdown) and in June 2020

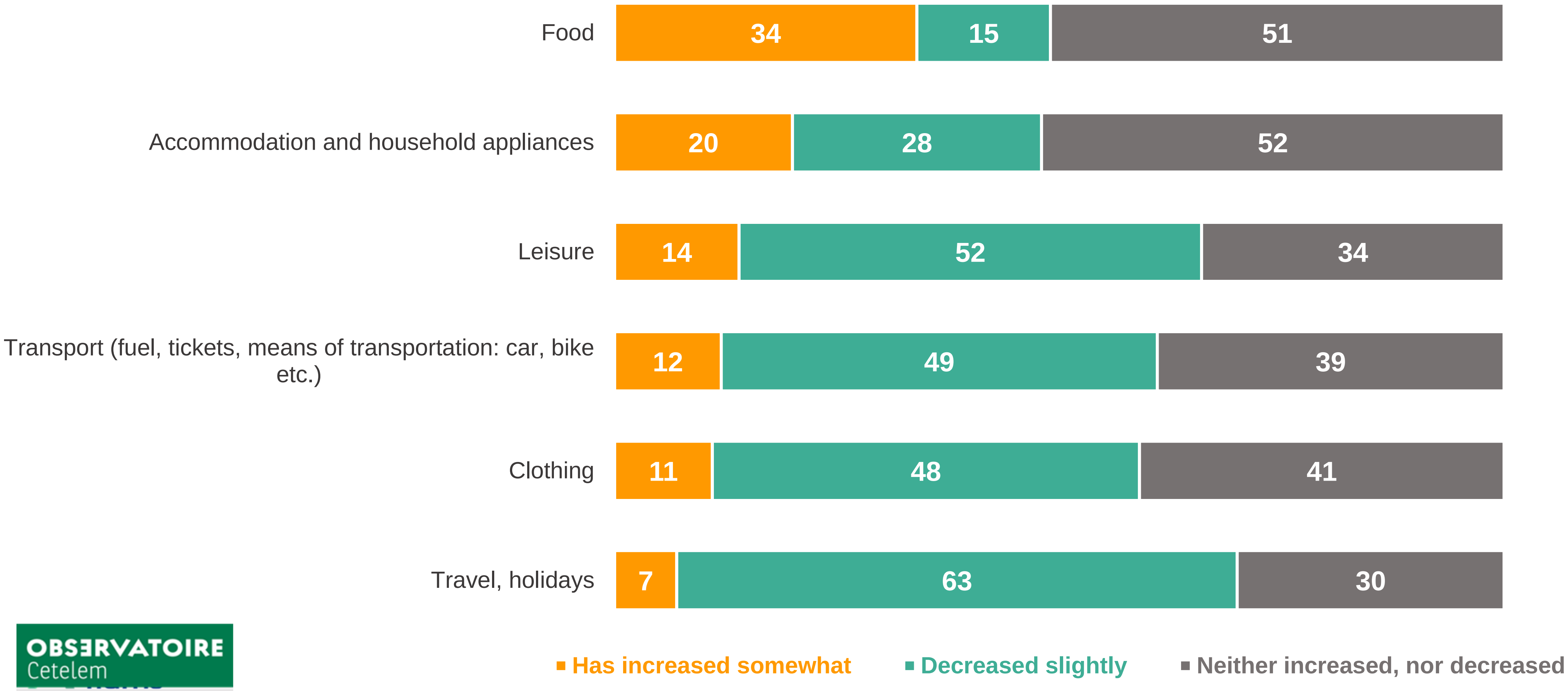
# As a whole, one third of Europeans believe that their spending on food has increased, contrary to spending on clothing, travel and holidays which has decreased somewhat

Compared to the situation before the Covid-19 crisis, do you feel that the following expenses in your budget have increased, decreased or stayed the same? Spending on..

- To all respondents, in % -

**Together**
*9 countries*

**Intermediate point, new question**

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# Details per country

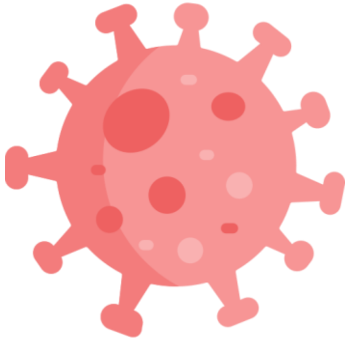
Compared to the situation before the Covid-19 crisis, do you feel that the following expenses in your budget have increased, decreased or stayed the same? Spending on..

- To all, as a % of responses "**Increased somewhat** " -

**Intermediate point, new question**

| | ENS | DE | BE | ES | FR | IT | PT | CZ | UK | SE |
|---|---|---|---|---|---|---|---|---|---|---|
| Food | **34** | 29 | 43 | 34 | 35 | 32 | 45 | 39 | 39 | 28 |
| Accommodation and household appliances | **20** | 13 | 23 | 29 | 18 | 19 | 24 | 19 | 24 | 16 |
| Leisure | **14** | 16 | 11 | 10 | 12 | 12 | 12 | 10 | 17 | 10 |
| Transport (fuel, tickets, means of transportation: car, bike etc.) | **12** | 11 | 14 | 10 | 14 | 13 | 11 | 17 | 9 | 11 |
| Clothing | **11** | 10 | 14 | 9 | 14 | 9 | 9 | 11 | 11 | 10 |
| Travel, holidays | **7** | 7 | 8 | 5 | 9 | 6 | 5 | 12 | 6 | 4 |

## II. Local consumption at the time of Covid-19



# Retrospectives, the state of play and outlook: Europeans managing the crisis

While concerns have been crystallizing significantly over recent months around health under the effects of the pandemic, environmental concerns remain and **the indicators point to an acute collective awareness of the benefits of more responsible consumption.** A very large majority of Europeans thereby continue to the believe this is important (51%) or even an absolute priority (43%) to encourage buying locally-made products.

**Nevertheless, major disparities remain revealing different degrees of maturity depending on the country in terms of these issues**, deemed to be clearly more of a priority in Italy and Portugal and much less in Sweden, for example, where these practices are already more widespread. **Thus, far from having shaken up the consciences, these recent months marked by the virus have rather contributed to strengthening trends already present before the crisis**. So, consuming local products is considered firstly to be an act in support of the environment (44%, up to 52% in Germany and 55% in Sweden) to a lesser degree an target that you set (27%) or a duty (20%), while the tendency to consider it as a patriotic act has tended to fall over the last two years. Although only 15% say they don't pay attention to consuming local products, the Belgians, British and Czechs are still more likely to be less concerned by this issue.

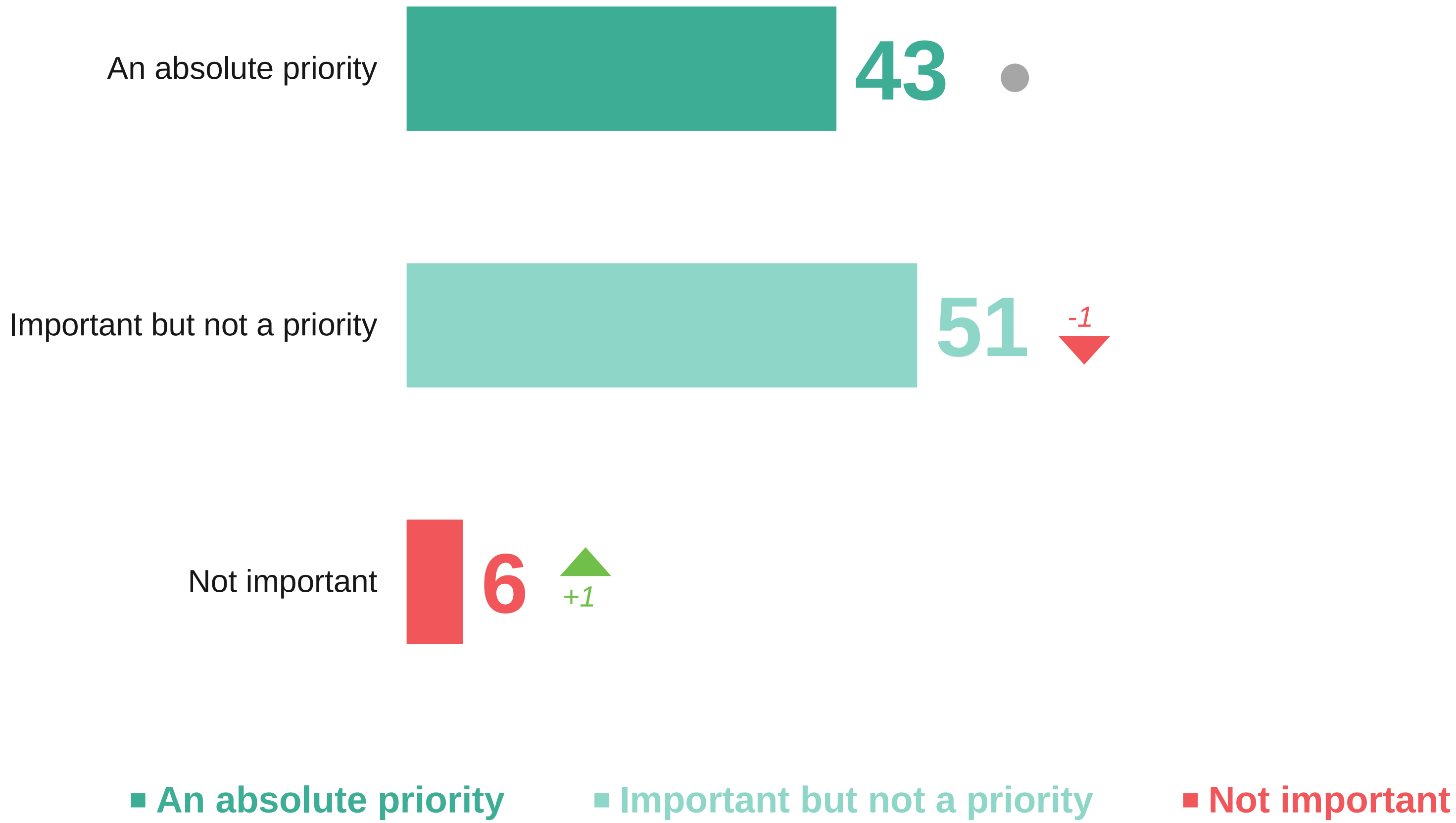
Overall, **buying locally-made products in the context of the Covid-19 crisis is viewed positively in numerous respects** :protecting/creating jobs in the country, ensuring product traceability, consuming quality products, reducing CO2 emissions. We note that although consuming local products continues to be seen positively, ensuring the economic independence of our country, this idea is not more important than the others even while the issue of relocating certain industries and the independence of certain countries with respect to others, particularly at a time when the shortage of face masks has been brought to light, especially in France.

# The importance given to local products is still something of a priority for Europeans

Would you say that encouraging people to purchase products made locally, i.e., in your country, is...?

- To all respondents, in % -

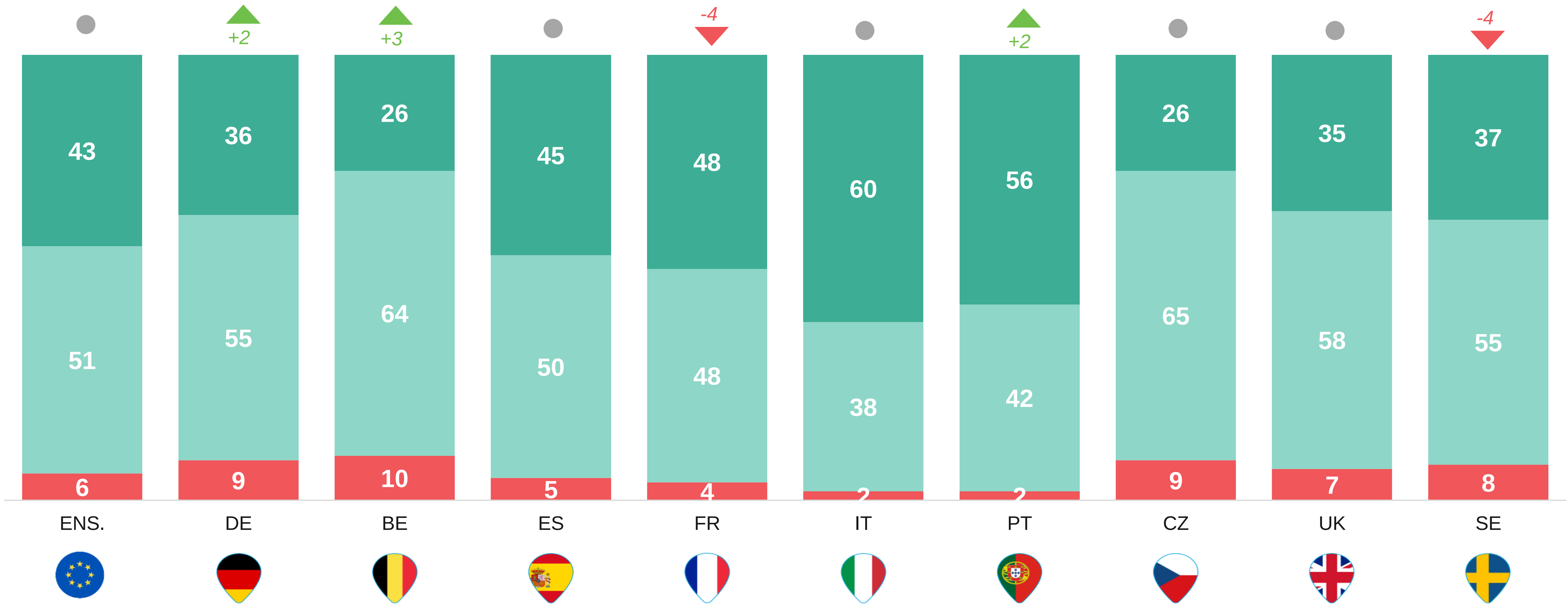
**Together**
*9 countries*



# Details per country

Would you say that encouraging people to purchase products made locally, i.e., in your country, is...?

- To all, in % - Trends presented corresponding to the category “**Absolute priority**”




*An absolute priority* | *Important but not a priority* | *Not important*

# Map - The priority given to buying locally-made products

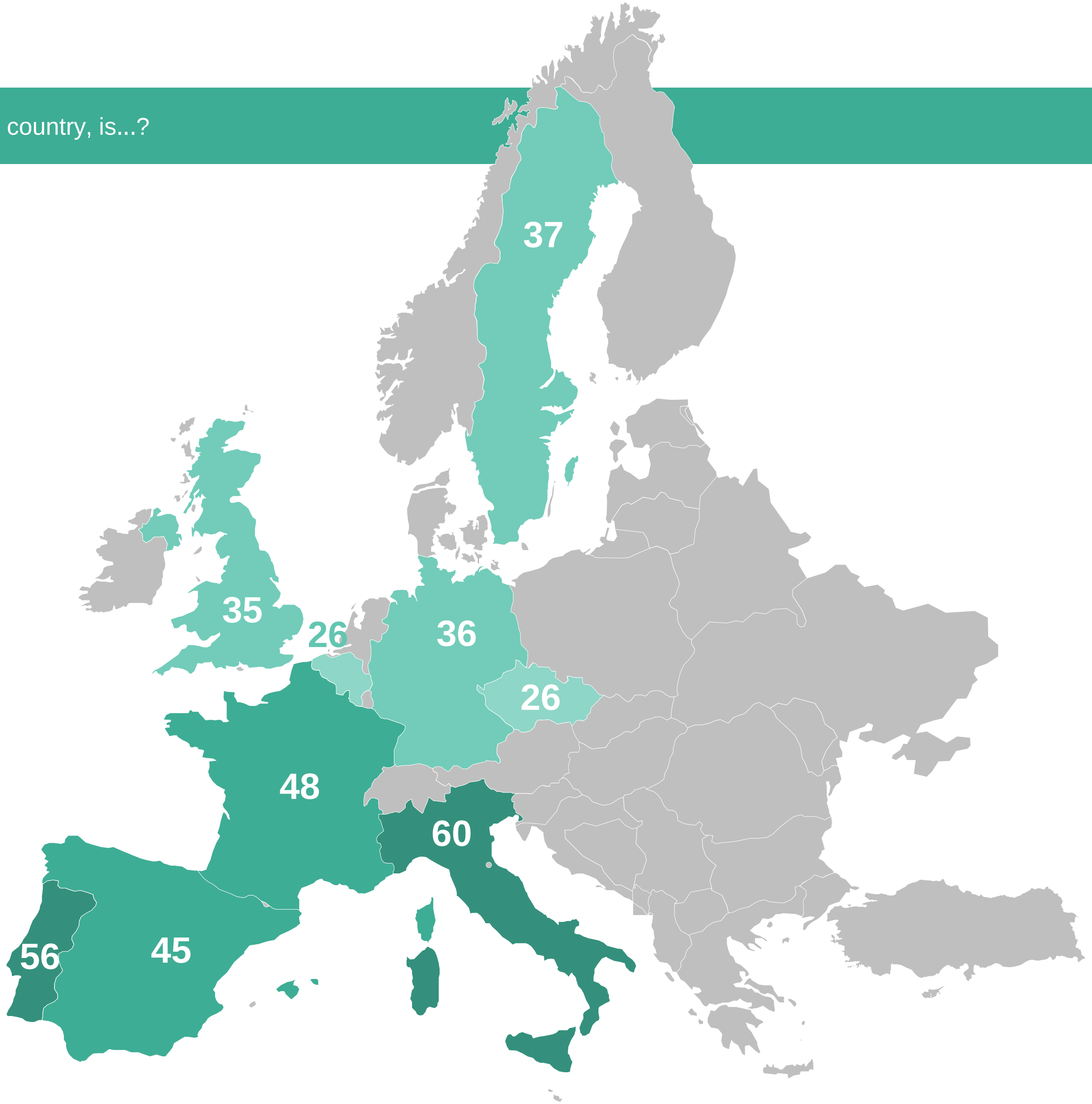
Would you say that encouraging people to purchase products made locally, i.e., in your country, is...?

- To all respondents, in % -

**Together**
*9 countries*

**"An absolute priority"**

**43%**

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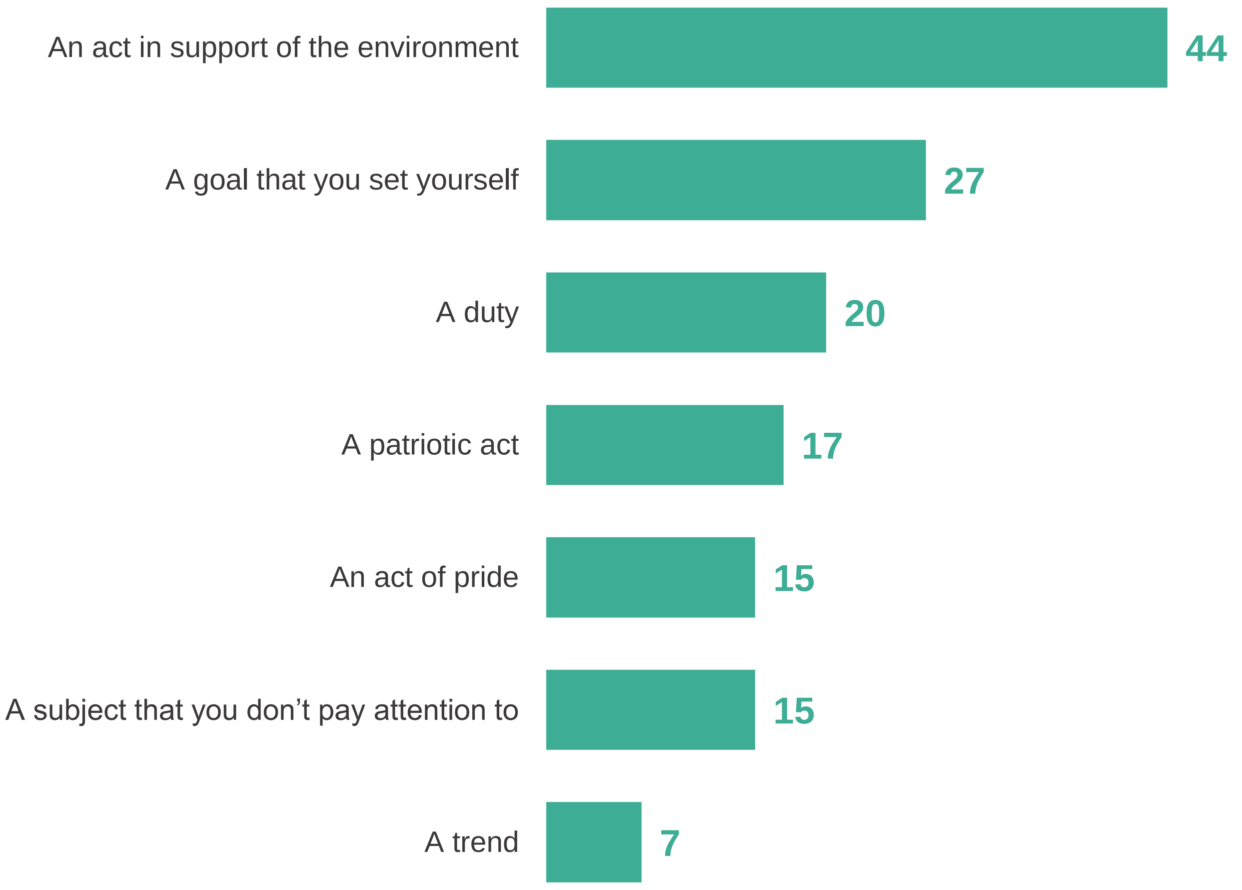
# Local consumption is presented by Europeans primarily as an act in support of the environment, but also a goal and a duty

For you, would you say that consuming local, meaning to favour products made in [Name of Country], is above all...?
Responses given from a list - Two possible responses - Total higher than 100%

- To all, as a % - The trends are presented in comparison to the **2018** wave

**Together**
*9 countries*




| *Reminder 2018* |
|---|
| 42 |
| 26 |
| 20 |
| 24 |
| 20 |
| 17 |
| 6 |

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# Details per country

For you, would you say that consuming local, meaning to favour products made in [Name of Country], is above all...?
Responses given from a list - Two possible responses - Total higher than 100%

- To all respondents, in % -

| | ENS | DE | BE | ES | FR | IT | PT | CZ | UK | SE |
|---|---|---|---|---|---|---|---|---|---|---|
| An act in support of the environment | **44** | 52 | 38 | 37 | 44 | 46 | 22 | 35 | 42 | 55 |
| A goal that you set yourself | **27** | 20 | 22 | 45 | 30 | 28 | 28 | 17 | 21 | 27 |
| A duty | **20** | 14 | 13 | 22 | 20 | 34 | 40 | 15 | 14 | 9 |
| A patriotic act | **17** | 23 | 15 | 11 | 17 | 16 | 27 | 27 | 13 | 18 |
| An act of pride | **15** | 15 | 13 | 7 | 16 | 17 | 13 | 16 | 19 | 9 |
| A subject that you don’t pay attention to | **15** | 16 | 24 | 9 | 11 | 10 | 6 | 25 | 24 | 16 |
| A trend | **7** | 5 | 11 | 7 | 11 | 6 | 5 | 4 | 6 | 7 |

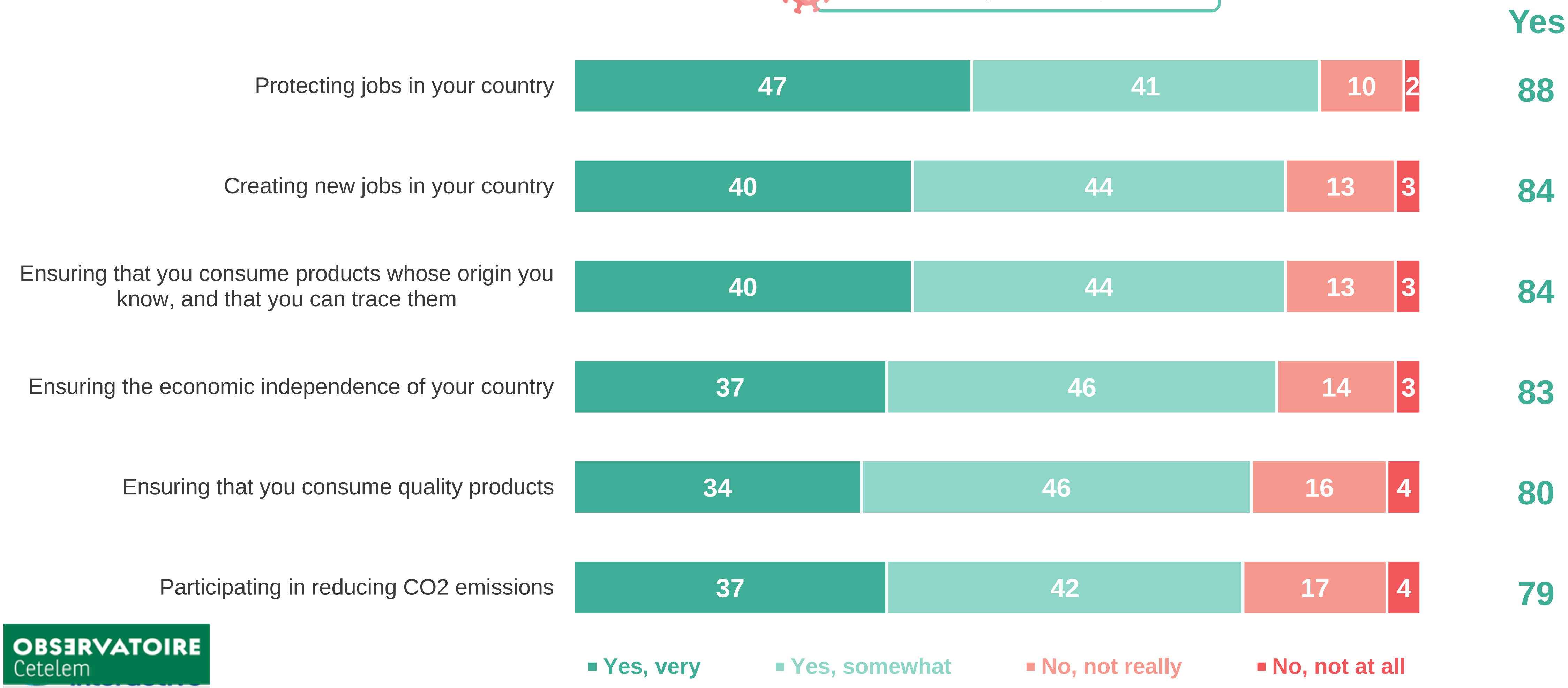
# The majority of Europeans believe that buying local products in the context of the health crisis meets several objectives, particularly that of protecting jobs

And according to you, in the context of the Covid-19 crisis, buying locally-made products, meaning [in your country], is or isn't it a way of...?

**Together**
*9 countries*

- To all respondents, in % -

**Intermediate point, new question**

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# Details per country

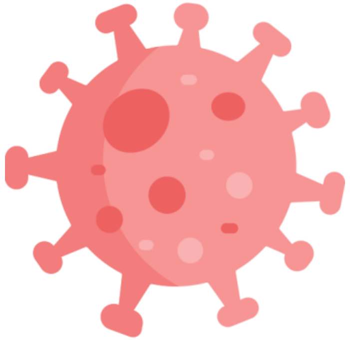
And according to you, in the context of the Covid-19 crisis, buying locally-made products, meaning [in your country], is or isn't it a way of...?

- To all, as a % of responses "**Yes**" -

**Intermediate point, new question**

| | ENS | DE | BE | ES | FR | IT | PT | CZ | UK | SE |
|---|---|---|---|---|---|---|---|---|---|---|
| Protecting jobs in your country | **88** | 83 | 88 | 91 | 89 | 93 | 96 | 85 | 85 | 86 |
| Creating new jobs in your country | **84** | 76 | 81 | 89 | 85 | 91 | 94 | 83 | 80 | 84 |
| Ensuring that you consume products whose origin you know, and that you can trace them | **84** | 79 | 79 | 86 | 88 | 91 | 87 | 79 | 78 | 81 |
| Ensuring the economic independence of your country | **83** | 78 | 79 | 85 | 82 | 87 | 93 | 83 | 82 | 85 |
| Ensuring that you consume quality products | **80** | 78 | 74 | 82 | 83 | 89 | 85 | 83 | 72 | 76 |
| Participating in reducing CO2 emissions | **79** | 81 | 77 | 75 | 82 | 79 | 71 | 68 | 78 | 79 |

# III. New purchasing habits encouraged by the health crisis



# Retrospectives, the state of play and outlook: Europeans managing the crisis

**Although the Covid-19 crisis has momentarily changed purchasing and consumption habits, it does not, however, seem to be able to, at least at this stage, generate lasting change in this area** , beyond the trends already measured beforehand. Continuing to buy local products is a long-term consideration in terms of consumption, a trend already present before the crisis, with the attractiveness of physical stores remaining high (63%) while cohabiting with online stores (60%, up to 71% and 72% in Spain and Italy, respectively). However, the long-term tendency to buy organic products, second-hand products or even have groceries delivered to your home address is markedly weaker (a trend more marked on the last point, however, in Spain and Portugal where more than elsewhere consumers say they want to continue this habit taken up during the crisis: 55% and 52% compared to 37% on average).

**We don’t therefore see any major shift in purchasing intentions in the light of these indicators. We do note, however, that the crisis is contributing to exacerbating trends already present beforehand: a even stronger desire among seniors to go to physical stores, and a strengthened attraction among younger people to shop online.**

Invited to react to a strengthening of certain practices leading to less human contact and reliance on digital technology under the effect of the health crisis, a large majority of Europeans believe that this is a relatively good thing (78%, but only 20% saying that it’s a very good thing). Young people share this opinion more than seniors do. Beyond this consensus, both in reality grasp these changes with more or less ease, depending on the area concerned and the country. In the field of commerce or even work, more than six out of ten Europeans say that these changes are easy to grasp. Concerning health, these changes more or less divide Europeans, half of whom say that they tackle them with difficulty. Finally, reservations are largely more marked concerning the area of culture and further still when it comes to human relationships (24% of whom say that this is very difficult). The advent of a more pronounced “contactless” and more digital era, seems to further create difficulties in certain countries. Belgians thereby experience greater difficulty in all the areas tested. Finally, we note that France and, above all, Portugal also find it much more difficult than the average when tackling these changes, particularly in terms of human relationships.

# Three out of four Europeans say that the Covid-19 crisis would encourage them to buy local products in the long term

Has the Covid-19 crisis encouraged you to sustainably...?

**Together**
*9 countries*

- To all respondents, in % of "**Yes**" answers -

**Intermediate point, new question**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# Details per country

Has the Covid-19 crisis encouraged you to sustainably...?

- To all respondents, in % of "**Yes**" answers -

**Intermediate point, new question**

| | ENS | DE | BE | ES | FR | IT | PT | CZ | UK | SE |
|---|---|---|---|---|---|---|---|---|---|---|
| Buy local products | **75** | 69 | 68 | 86 | 72 | 88 | 87 | 67 | 67 | 72 |
| Buy in-store | **63** | 67 | 65 | 68 | 63 | 60 | 60 | 63 | 56 | 55 |
| Buy online | **60** | 50 | 56 | 71 | 52 | 72 | 67 | 53 | 63 | 62 |
| Buy organic products | **47** | 44 | 37 | 58 | 45 | 61 | 54 | 34 | 35 | 48 |
| Buy second-hand products | **39** | 39 | 38 | 43 | 41 | 35 | 39 | 24 | 42 | 48 |
| Have your groceries delivered directly to your home | **37** | 25 | 24 | 55 | 27 | 44 | 52 | 30 | 43 | 35 |

# Map - The tendency to have groceries delivered directly to people’s homes following the Covid-19 crisis

Has the Covid-19 crisis encouraged you to sustainably...?

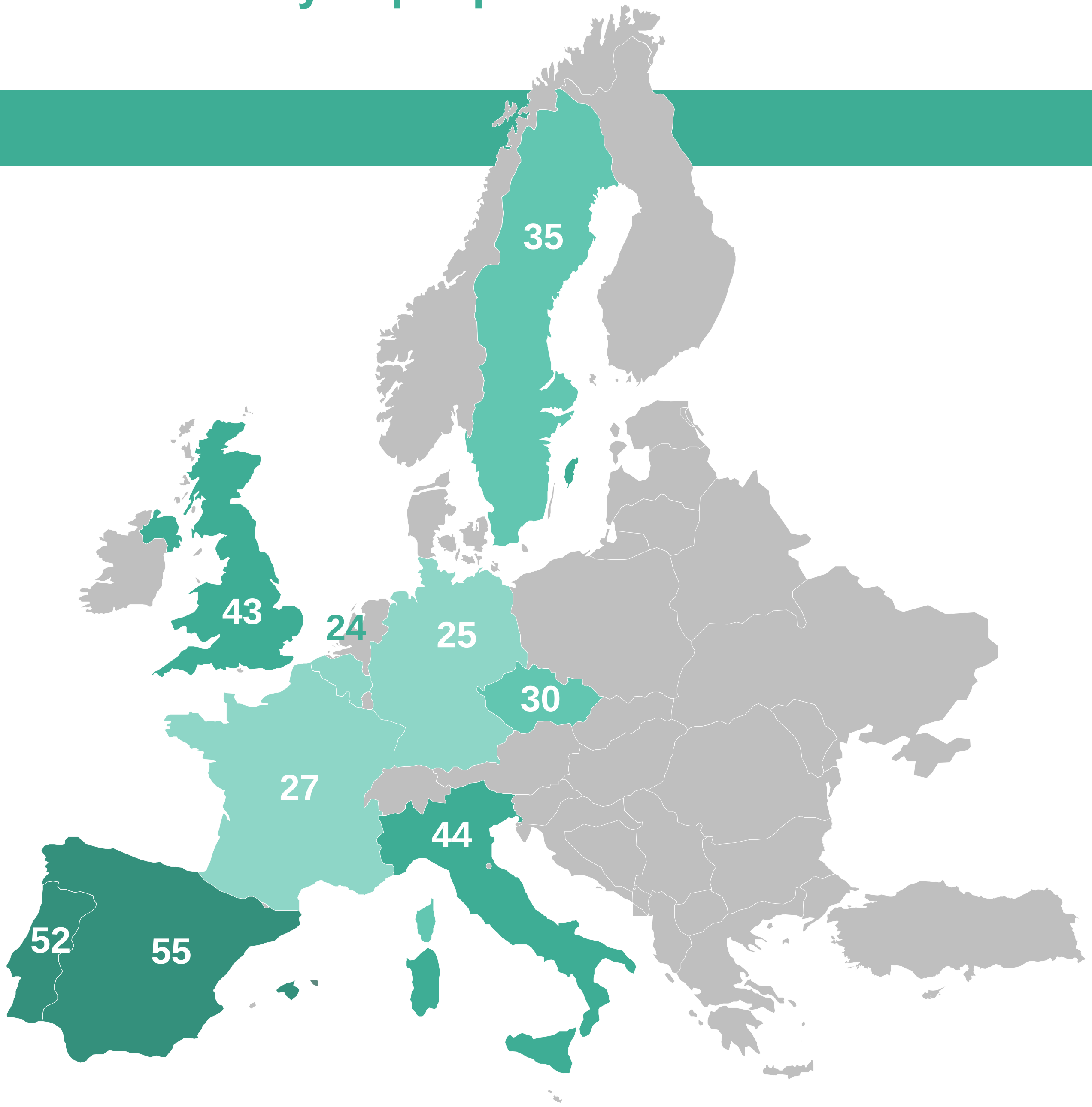
- To all respondents, in % of “**Yes**” answers -

**Intermediate point, new question**

**Together**
*9 countries*

## “Have your groceries delivered directly to your home”

# 37%

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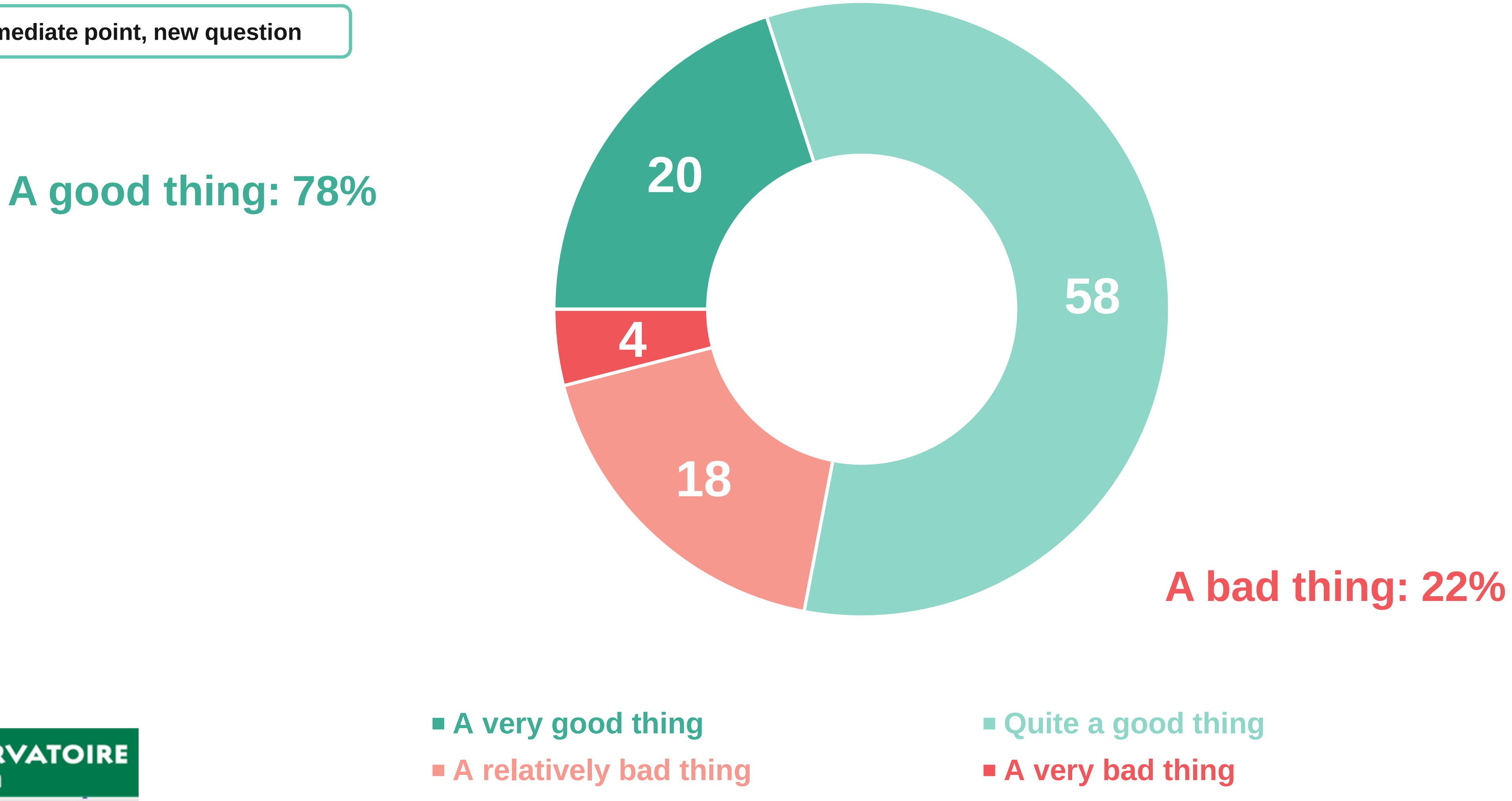
# Nearly eight out of ten Europeans say that greater reliance on digital technology in their everyday lives is a good thing

The health crisis has contributed to strengthening certain practices that result in less contact on a daily basis and favour the use of digital technology (online purchases, remote working, contactless payment etc.). Would you say that this is...?

**Together**
*9 countries*

- To all respondents, in % -

**Intermediate point, new question**

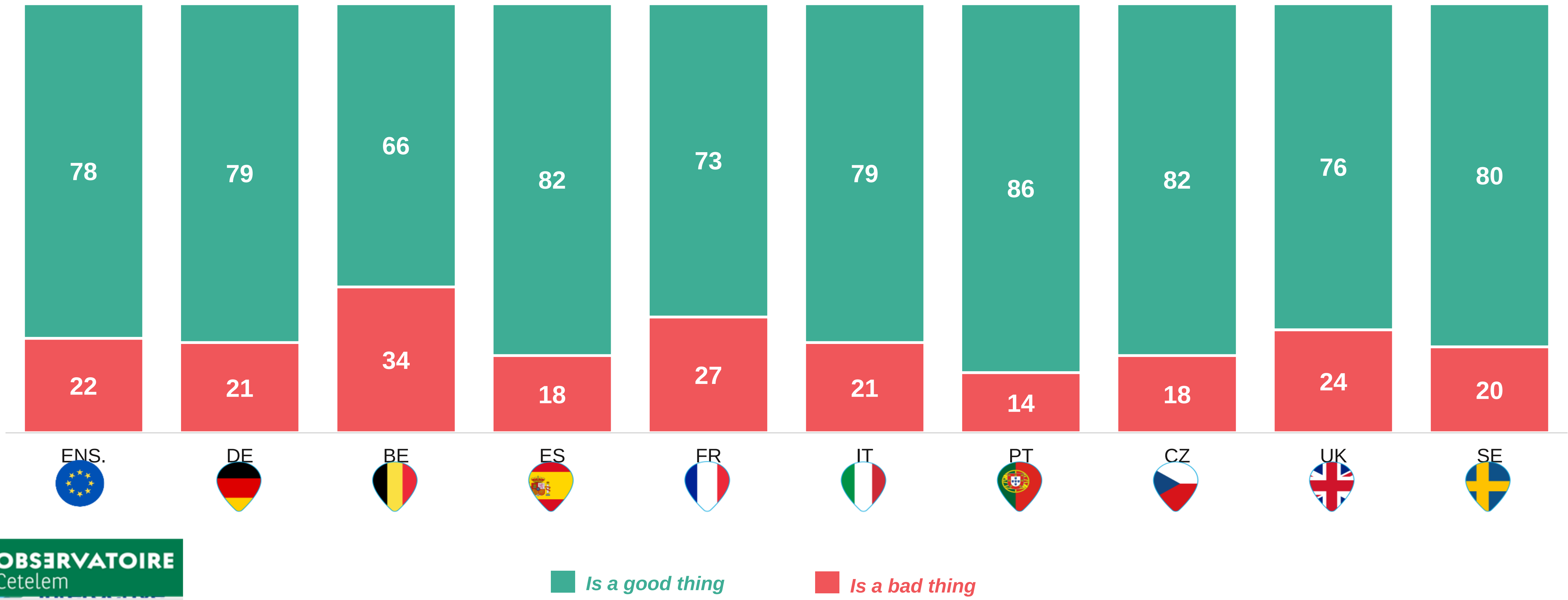


# Details per country

The health crisis has contributed to strengthening certain practices that result in less contact on a daily basis and favour using digital technology (online purchases, remote working, contactless payment etc.). Would you say that this is...?

- To all respondents, in % -

**Intermediate point, new question**

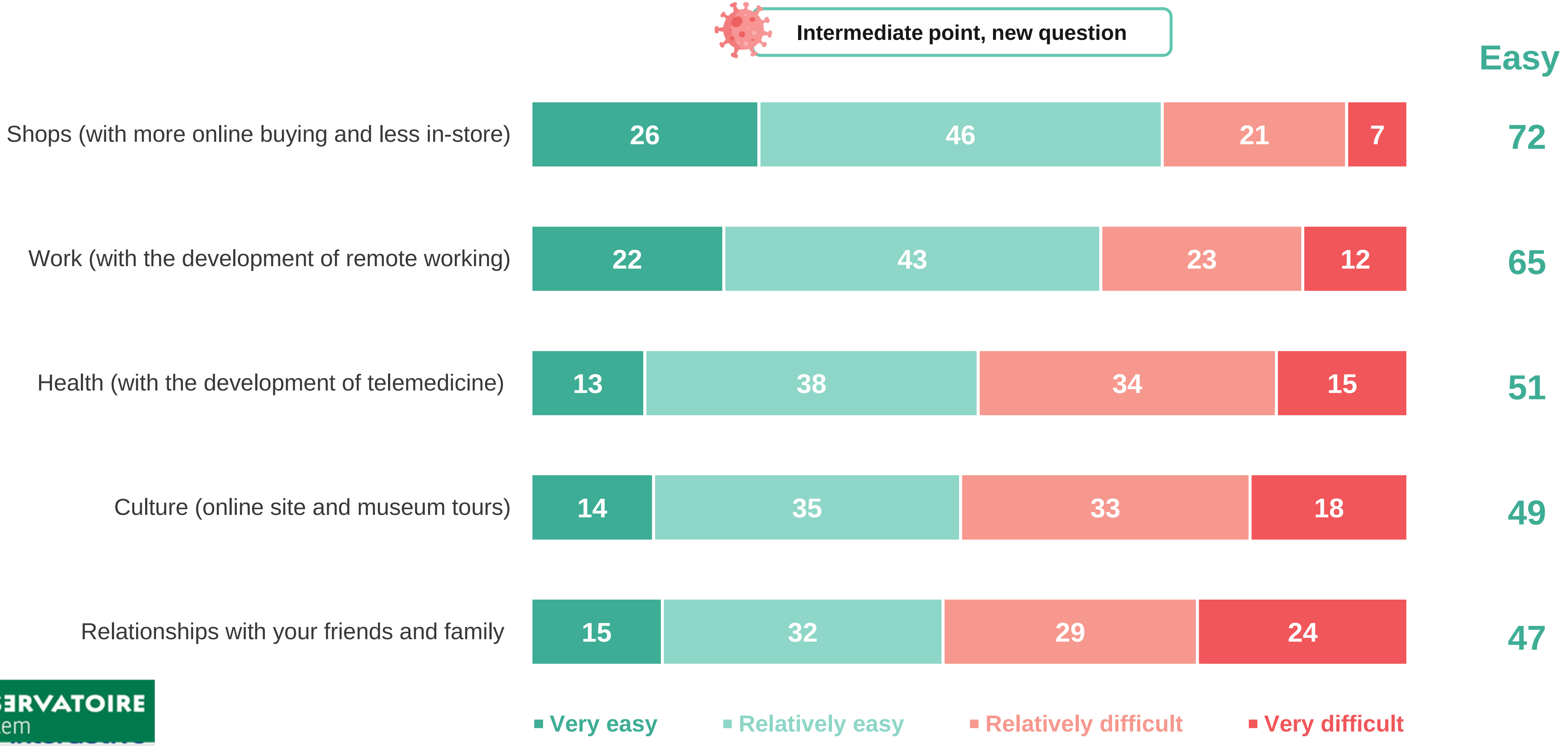


# As a whole, Europeans believe that it would be quite easy for them to adapt to making more online purchases and developing work, but say that the decline in physical contact with friends and family is harder

For you personally, would you say that it would be easy or difficult to adapt to a world in which there would be less physical human contact and more digital in each of the following areas?

- To all respondents, in % -

**Together**
*9 countries*

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# Details per country

For you personally, would you say it would be easy or difficult to adapt to a world in which there would be less physical human contact and more digital in each of the following areas?

- To all, as a % of "**Easy**" -

**Intermediate point, new question**

| | ENS | DE | BE | ES | FR | IT | PT | CZ | UK | SE |
|---|---|---|---|---|---|---|---|---|---|---|
| Shops (with more online buying and less in-store) | **72** | 72 | 58 | 74 | 61 | 79 | 69 | 74 | 73 | 78 |
| Work (with the development of remote working) | **65** | 65 | 63 | 68 | 61 | 67 | 68 | 68 | 64 | 65 |
| Health (with the development of telemedicine) | **51** | 54 | 34 | 54 | 44 | 52 | 39 | 50 | 57 | 58 |
| Culture (online site and museum tours) | **49** | 50 | 36 | 55 | 44 | 52 | 37 | 46 | 50 | 47 |
| Relationships with your friends and family | **47** | 49 | 30 | 47 | 42 | 52 | 24 | 45 | 51 | 43 |

# Map - The perceived difficulty making more online purchases and fewer in-store

For you personally, would you say it would be easy or difficult to adapt to a world in which there would be less physical human contact and more digital in each of the following areas?

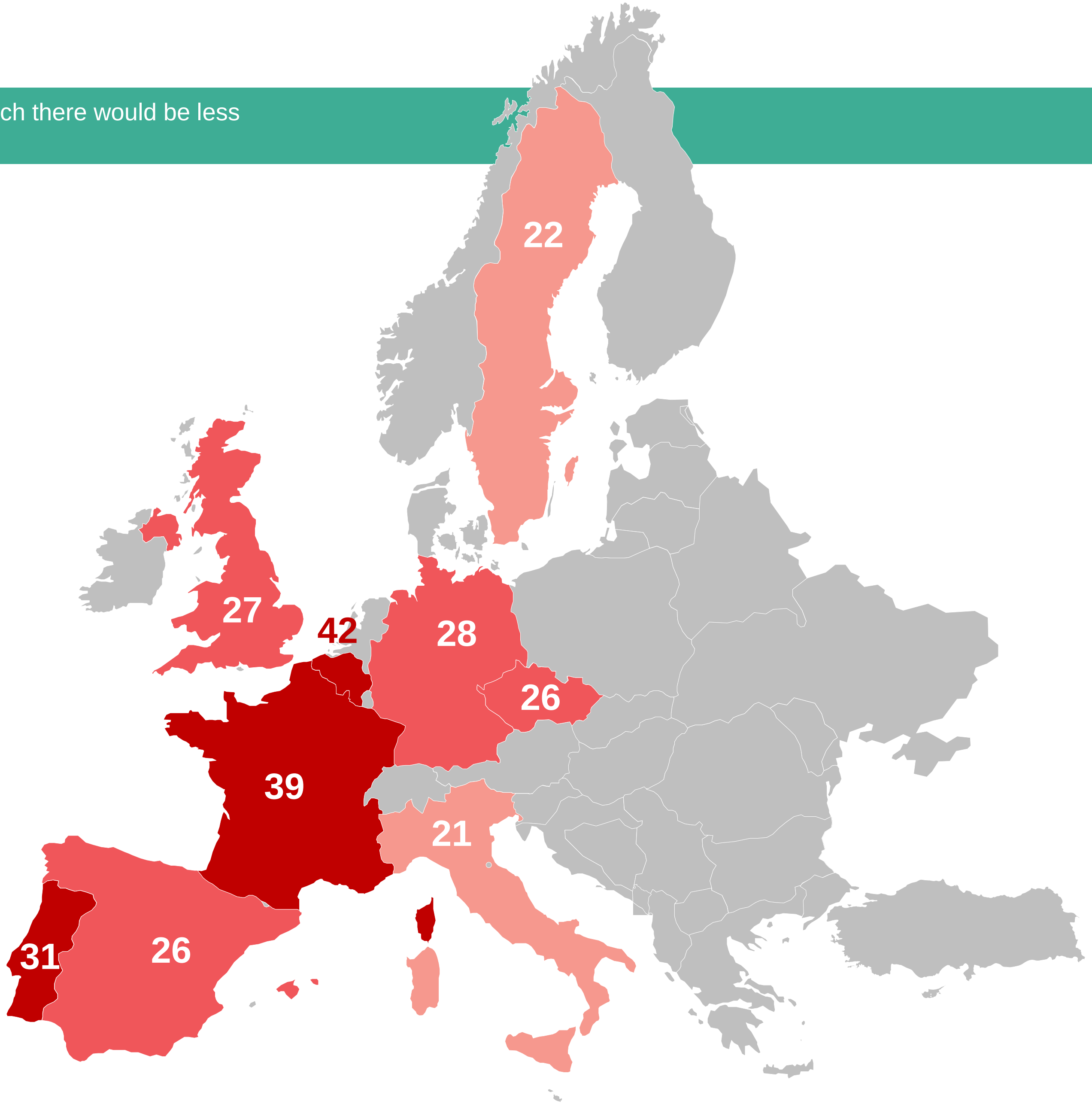
- In all, as a % of "**Difficult**" -

**Intermediate point, new question**

**Together**
*9 countries*

**Shops (with more online purchases and fewer in-store)**

**28%**

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# Map - The perceived difficulty in reducing human contact in your relationships with friends and family

For you personally, would you say it would be easy or difficult to adapt to a world in which there would be less physical human contact and more digital in each of the following areas?

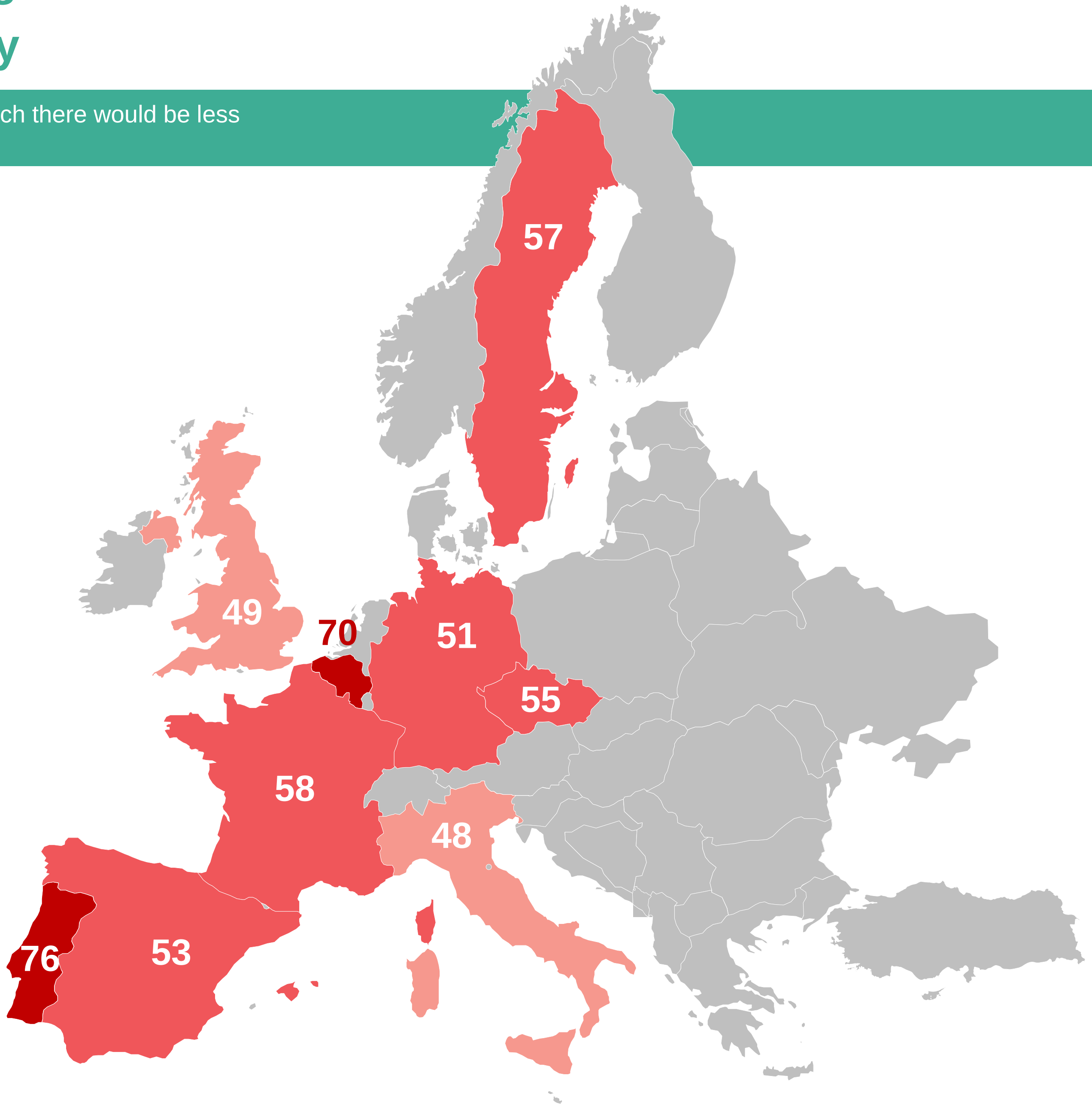
- In all, as a % of "**Difficult**" -

**Intermediate point, new question**

**Together**
*9 countries*

**Relationships with friends and family**

**53%**



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